TrueFiling User Guide

Release 3.0.14.53

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Revision History

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3.0.3.7	06.08.18	Updated for release 3.0.3.16
3.0.4.0	06.29.18	Updated for release 3.0.4
3.0.8.0	11.18.18	Updated for release 3.0.8.17
3.0.9.0	01.03.19	Updated for release 3.0.9.11
3.0.10.0	02.13.19	Updated for release 3.0.10.35
3.0.10.1	02.22.19	Updated Verified Contact content
3.0.12.0	04.15.19	Updated for release 3.0.12.22
3.0.13.0	05.17.19	Updated for release 3.0.13.16
3.0.14.0	06.21.19	Updated for release 3.0.14.43
3.0.14.1	08.24.19	Updated for release 3.0.14.53

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Table of Contents

About our Help System

Our Help system has been designed to guide you through each aspect of electronic court filing and servicing.

Be aware that the screen images presented in our Help system do not reflect one specific court. Therefore, some differences may exist between the images shown here and those you'll see when using TrueFiling.

Access Help through the **Help / Support** link under **Resources** in the TrueFiling navigation pane.

You can right click the link and select the **Open link in new tab** or **Open link in new window** option, which opens the Help system in a separate tab / window in your browser. While working in TrueFiling, you can then access Help whenever you need it simply by selecting that tab or accessing the window.

TrueFiling Help Topics

When you expand **TrueFiling Help Topics** in the table of contents, you're presented with Help topics that detail all aspects of TrueFiling, from signing up to submitting your filing and downloading court-generated documents. Select a topic to view the contents.

TrueFiling Guides

We've incorporated two guides within the Help - the TrueFiling User Guide and the TrueFiling Quick Start Guide. Both will launch within Help; however, you can download, save, and print them.

Quick Start Guide

You can download the Quick Start Guide PDF file and print it as a handy resource for your cube wall.

To access this file from within Help, select **TrueFiling Guides** in the table of contents and then click **Quick Start Guide**.

The guide will display in a separate tab. From there, you can save it and print it.

User Guide

All our Help topics are published in our User Guide PDF file. You can access this file and then save and print it.

Access the guide by selecting **TrueFiling Guides** in the table of contents and then clicking **User Guide**.

The guide will launch in a separate tab. From there, you can save it locally and / or print it.

TrueFiling Videos

We've developed two video series that let you see TrueFiling in action and understand how to quickly and intuitively create your filings and submit them to the court.

Quick Videos

If you need a quick refresher on how to perform TrueFiling tasks such as adding a connection to your network or enabling text notifications, our Quick Videos are the answer.

These short (usually between one and two minutes) videos provide to-the-point how-to's for common TrueFiling activities.

Select the **TrueFiling Videos** entry in the table of contents and select **Quick Videos**. Search through the video list, select the video you want to view, and click the arrow to launch.

Training Videos

We also provide training videos that take you step by step through TrueFiling functionality. These videos are narrated, and each operation is detailed.

Select the **TrueFiling Videos** entry in the table of contents and select **Training Videos**. Search through the video list, select the video you want to view, and click the arrow to launch.

Answers to Common Filer Questions

Select **Answers to Common Filer Questions** in the table of contents to view answers to common questions our filers ask. These answers are also provided in this guide. See Answers to Common Filer Questions for details.

More Resources

We’ve also provided links to ImageSoft sponsored web sites that provide additional information about TrueFiling. Access **More Resources** in the table of contents and select the appropriate site.

Getting Started in TrueFiling

If you're new to eFiling, you probably have questions.

If you're new to TrueFiling, you may have questions.

Review this section to understand what TrueFiling is and how you can easily sign up for your TrueFiling account.

In addition, explore TrueFiling Basics to understand key concepts and components of TrueFiling.

What is TrueFiling?

TrueFiling is a web-based eFiling and eService solution for attorneys, firm staff, court reporters, and pro se (self-represented) filers. It provides an intuitive user interface where filers can electronically file documents for an existing case or initiate a new case. Using an Internet connected computer instead of filing paper copies at the Clerk's office results in increased efficiency and accuracy.

The TrueFiling system also enables the court to electronically accept, route, and take action on filings such as signing proposed orders or summons, as well as case initiation requests. TrueFiling provides a completely paperless solution for case initiation, filing submission, court reporting, document service, and all the processes in between.

The filing process in TrueFiling typically consists of:

The filer - an attorney, self-represented filer, or court reporter (or a TrueFiling connection who can file on their behalf) - who will:

- Prepare the documents to file to the court using applications such as Microsoft Word or Adobe Acrobat.
- Log in to their TrueFiling account using their email address and password.
- Search for and locate their case. If the case has not yet been created at the court, the filer can initiate the case through TrueFiling.
- Upload the filing documents.
- Specify any service recipients for the filings.
- Submit their filings.
- Select the payment account that will be charged any fees associated with the filing.

Once successfully submitted, the documents are sent to the court Clerk for review. Any associated fees are charged accordingly.

The filer can view their filing's status with the court via the TrueFiling History page. Also, notifications regarding the filing's status can be sent via text message or email to the filer if the appropriate notification settings have been set.

eService

- For all filings specified for eServicing, the selected service recipients will be served via email. If the court requires a Proof of Service, and you eServe, TrueFiling will automatically generate and deliver a Proof of Service to the court. If allowed by the court, a single Proof of Service may be generated for all related filings submitted together.

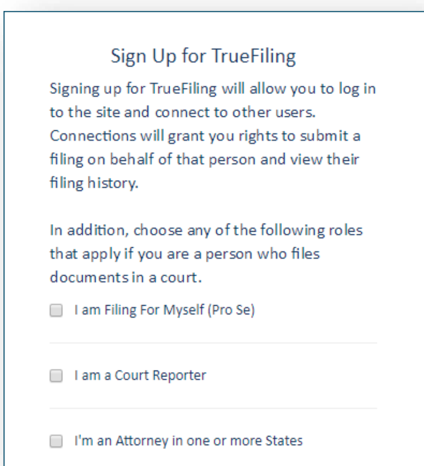
The Clerk, who will:

- Review the incoming filings and Proof of Service and then reject or tentatively accept each filing based on court rules.
- If the Clerk accepts the filing(s), the filer can view the filing's status with the court via the TrueFiling History page and be sent an acceptance notification via text message or email.
- If the Clerk rejects the filing(s), the filer can view the rejection reason via the History page and be sent a rejection notification.
- If the filing is accepted, and payment is approved, the Clerk will electronically stamp the filing and update the Register of Actions for the case accordingly.

Sign up for TrueFiling

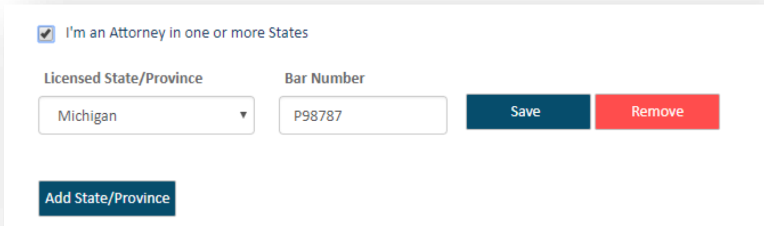
Before you can eFile with TrueFiling, you must sign up and create your TrueFiling account. This is a simple process.

1. Access the TrueFiling website at **mifile.courts.michigan.gov** (Michigan filers) or **tf3.truefiling.com**.
2. In the upper-right corner, click **Sign up**.
3. On the page displayed, input your **Email address**.
4. Input your **First Name** and **Last Name**.
5. Input your contact information.
6. Next, specify what user role you want associated with your login credentials.



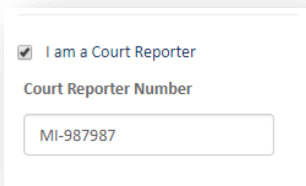
You can select one role, multiple roles, or none. If you don't select a user role, you'll only be able to file on behalf of other TrueFiling users with specified roles who are in your connection network. See TrueFiling Connections for details.

- If you select **I'm an Attorney**:



1) Select your state or province from the **Licensed State/Province** field drop-down list.
2) Input your **Attorney** or **Bar Number** (maximum of 25 characters).
3) If you plan to file in more than one state or province, click **Add State/Province** and repeat steps 1-2 for each location.

- If you select **I'm a Court Reporter**:



1) Input your **Court Reporter Number**.

- If you choose to file for yourself, select **I'm filing for myself (Pro Se)**.

NOTE: After you're registered, you can change your role on the Settings page. Select **Settings** in the navigation pane, expand the **My Information** pane, and scroll down to the **Manage Roles** section.

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7. Input the **Password** you want to use for TrueFiling. It must contain:
   - At least one lower-case letter [a-z]
   - At least one upper-case letter [A-Z]
   - At least one numeral [0-9]
   - At least one symbol [!@#^&*()+_,{}?-]
   - A minimum of 8 characters
   - A maximum of 20 characters

8. Confirm your password.

9. Click **Sign up**. A TrueFiling message is displayed indicating a registration confirmation email will be sent to the address you provided.
10. Open the email and click **Confirm now** to confirm your email address. A TrueFiling message will display indicating you've confirmed your address.
11. Click the link in the message to log in to TrueFiling. You can also click the **Log In** button located in the upper-right corner of the page.
12. On the Log In page, input your **Email Address.**
13. Input your **Password**.
14. Click **Log In**.
    The End User License Agreement is displayed.
15. Read the agreement and select the checkbox to confirm.
16. Click **I Accept**.

You will be logged in to TrueFiling.

As a new user, you should click **Settings** in the navigation pane so you can:

- Send connection requests to other TrueFiling users. See TrueFiling Connections for details.
- Set up your payment accounts. See Manage your Payment Accounts.
- Specify when to receive notifications about your filings. See Manage your Notification Settings.

Log in to TrueFiling

Before you can log in, you must sign up for a TrueFiling account. See Sign up for TrueFiling for details.

To log in:

1. Access the TrueFiling website at **mifile.courts.michigan.gov** (Michigan filers) or **tf3.truefiling.com**.
2. Input your **Email Address**.
3. Input the **Password** you specified when you signed up for your TrueFiling account.

   If you can't remember your password, see I Forgot my Password below for details on requesting a password reset.

4. Click **Log in**.

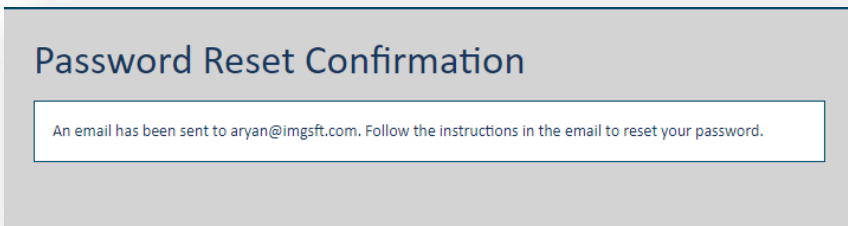
> After five unsuccessful login attempts, your account will be locked for five minutes. You can’t log in to your account if it’s locked.
>
> After five minutes, your account will be unlocked, and you can try to log in again.
>
> You can also unlock your account by resetting your password. To that end, when you’ve exceeded the number of login attempts, TrueFiling will send a password reset email to your email address. Follow the instructions in the email to reset your password. See I Forgot my Password in the next section for details on how to proceed.
>
> Once your password is reset, your account is unlocked.

If you're having trouble logging in to TrueFiling, information in Account Help later in this guide may be useful.

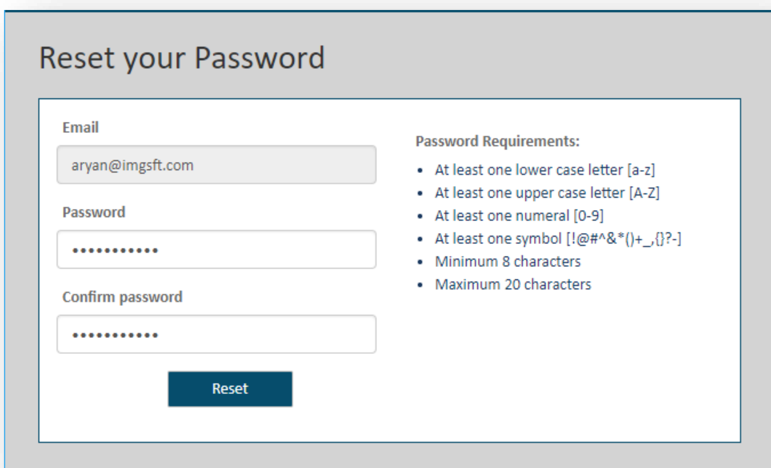
I Forgot my Password!

If you've forgotten your password, you can request a password reset.

1. On the Log In page, click the **Forgot password** link. The Forgot your Password page is displayed.
2. Input your **email address**.
3. Click **Submit**. A notification is displayed indicating a password reset email has been sent to the address you entered.



4. Open the email and click **Reset Password**. The Reset your Password dialog is displayed.



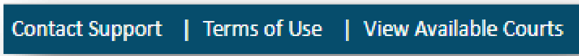
5. Input your new **Password**. It must contain:
   - At least one lower-case letter [a-z]
   - At least one upper-case letter [A-Z]
   - At least one numeral [0-9]
   - At least one symbol [!@#^&*()+_,{}?-]
   - A minimum of 8 characters
   - A maximum of 20 characters
6. Confirm your new password.

7. Click **Reset**.

Once your password is reset, you're automatically logged in.

View a List of TrueFiling Courts

You can access a list of courts that participate in TrueFiling electronic filing and view their contact information.



1. Click the **View Available Courts** link in the lower-right corner. You can also view the courts by clicking the **View Available Courts** link on the Log In page.

   A list of participating courts is displayed, organized by state.

2. Click **Close** to close the dialog.

TrueFiling Basics

Explore these topics to become familiar with TrueFiling features.

It may also be helpful to review Answers to Common Filer Questions later in this guide.

What's my Connection Network?

TrueFiling uses connections to build a network of firm attorneys, firm members, pro se filers, and court reporters.

When you add a registered TrueFiling user to your connection network, that user will be able to file on your behalf, and you can file on their behalf. Connections can also see each other's filing and payment histories and can use shared payment accounts. As a result, **it's important to send a connection request only to trusted persons such as co-counsel or other TrueFiling users in your firm**. You are responsible for any filing, service, and payment actions that you or your connected users make as a result of a connection.

A connection can be added to a case as a case contact and also selected as a service recipient for your filing documents.

When you ask another TrueFiling user to join your connection network, the next time they log in to TrueFiling, a Connection Request notification will display in the top menu bar. They'll also receive an email letting them know someone wants to connect.

To become part of your connection network, they MUST log in to TrueFiling and accept your request. They won't be an active connection until they accept the request.

You can connect only with a TrueFiling user whose email address has been confirmed. See Sign up for TrueFiling for details on email confirmation.

Some courts may allow only TrueFiling users whose user role is Attorney to send a connection request. In such courts, if your user role is not Attorney, you won't be able to send a connection request.

Just as you can send a connection request, you may receive a request from other TrueFiling users in your organization.

See TrueFiling Connections for more details.

How do I Find my Case in TrueFiling?

Each court determines what case types can be filed against in TrueFiling. As a result, not all courts will accept all case types. To determine which case types are supported for eFiling for a given court, contact the court Clerk's office.

In TrueFiling, you can search in TrueFiling registered courts for every case that's been assigned a permanent case number. The case list is updated each day with the previous day's newly created cases.

To locate your case and access its Case Details page, you can:

- Perform a search to locate your case and click the Case Number in the search results to launch the Case Details page. See Perform a Search to Access your Case later in this guide for details.

  OR

- If you or any of your connections have created a filing for a case and have submitted it to the court, you can access the History page, locate that case, and click the case number to launch the Case Details page.

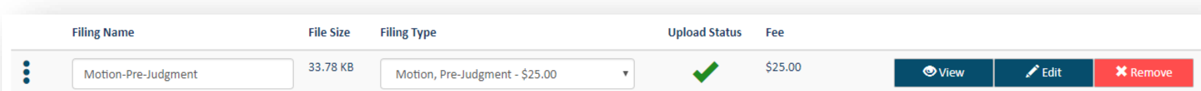
What Fees are Charged?

TrueFiling manages all billing transactions and account reconciliation with the court. Filing fees are calculated based on the filing type.

A filing may have one or more fees required for processing by the court. Each court can impose additional fees such as credit card processing fees, technology usage fees, or convenience fees. The court sets these fees, which may be based on the filing document type.

The court determines all associated fees and fee types based on the filing type. Therefore, the total filing fees may vary from court to court and from case type to case type.

On the Upload pane, the line item entry for each uploaded document lists the fee charged.



You can select the Fee amount to view the fee details.

The court may allow you to submit a fee waiver request to waive the fees associated with the case. See Request a Fee Waiver later in this guide.

Any or all of the following fees may be imposed:

Filing Fee

The filing fee is based on the case type and filing type and is the same fee that's applied when the filing is submitted as paper. Also known as a statutory fee, it is usually mandated at the state level.

In some courts, certain filing types require the filer to input the filing fee. If filer provided fees are enabled for the court you're filing in, one or more special filing types will be available in the **Filing Type** field drop-down list. If you select one of these filing types, you must input the fee amount. Any processing fees mandated by the court will be computed based on the amount you input.

Processing Fee

The processing fee is usually a set amount required to cover the credit card processing fee based on statutory or other fees. Each court determines the processing fee associated with each filing based on the case type and filing type. Usually, the fee is a fixed percentage, such as 3%, of the statutory fee. Some courts may elect to include the convenience fee as part of the processing fee calculation.

Processing fees may be applied to filer provided fees in courts where such fees exist.

Convenience Fee

The court determines convenience fees associated with a filing based on the servicing type and multiple filing maximum. Therefore, the total amount in fees for a filing may vary from court to court and from case type to case type.

The convenience fee is based on the type of servicing the filer specifies. Each court can specify the convenience fee amount based on the servicing selected.

For example, the court could impose a $5 convenience fee for eFiling only, an $8 convenience fee for eFiling with eService, and a $5 convenience fee for eService only. Each court will have a different fee schedule for the convenience fee.

Bundle Discount

The court can elect to cap the convenience fee when multiple filings are submitted together. This is known as a bundle discount.

If a discount is applied, the discount amount will be listed in the Checkout pane with any other fees that were applied.

Taxes

The court can tax any or all fees applied to a filling, or the tax may be applied only to fees associated with certain filing types.

What's a Fee Waiver?

You can request that the fees associated with your case be waived. The court you're filing in must permit fee waivers. The court determines which waiver types are available.

In some courts, you can download a waiver form from within TrueFiling, complete it locally, and then upload the completed form as part of your waiver request.

Depending on the court you're filing in, you can request a fee waiver if you:

- Believe the court has waived fees for the case – for example, if you're deemed indigent
- Receive public assistance
- Have been appointed counsel by the court and should be exempt
- Are filing on behalf of a government agency and should be exempt
- Upload a form that contains the fee waiver request
- Will pay the fees later through the court
- Are filing in a court that imposes an EFS (Electronic Filing Service) fee – in such courts you can request an exemption from that fee.

If your waiver is granted, all fees associated with the case are waived for you until the case is closed. Some courts, however, may waive or defer the fees only for a specific filing bundle, not until the case is closed.

You'll be notified via email if your fee waiver request was rejected. If the fees for the case aren't waived, your submitted filings will be rejected due to improper payment. You'll need to recreate and re-upload your filings.

See Request a Fee Waiver later in this guide for complete details, including information on downloading and uploading required waiver forms.

What's a Case Contact?

A case contact is someone associated with a case that can be selected for servicing when you file against the case. This person can be a party on the case, an attorney for parties and their associates, or other interested participant.

You'll add a contact to a case on the Case Details page. When a registered TrueFiling user is added as a service recipient for a submitted filing, that user will also be added as a contact to the case.

See Add or Remove a Case Contact later in this guide for details on how to add a case contact.

Verified and Standard Case Contacts

A court can be configured to classify case contacts as either Verified or Standard. A contact's classification determines if and how they can see other case contacts throughout TrueFiling, as well as if they are visible to other contacts and can be selected for servicing. A court may classify case contacts but place no restrictions on the information displayed.

Note: If a court is not configured to classify contacts, a case contact is visible to all, and any contact may be selected for document service**. The following information applies only to courts that are configured to classify case contacts as Verified or Standard.**

Standard Case Contact

When a person adds themselves, a connection, or other counsel as a case contact or service recipient for a filing, the added individual is identified as a Standard contact.

A court can be configured such that, when a user is added as a case contact or a service recipient, and the user's email address is in the same domain as an existing Verified case contact, that user will be added as a Verified case contact, not a Standard contact. The court can then identify domains (such as gmail.com, yahoo.com) that will be excluded from this configuration.

Depending on court configuration, any of the following may be true:

- Information (name, email address, and firm) of Verified contacts is redacted (not visible) for a Standard contact.
- A Standard contact will see all information of a Verified contact if they are connections. See TrueFiling Connections earlier in this guide.
- A Verified contact won't see a Standard contact or their information unless they are connections.
- A Standard contact will not see other Standard contacts unless they are connections.
    - If this configuration is set, other counsel added as a case contact or service recipient will not be visible.
- A Standard contact that is not a connection can't be selected for service.
- A Standard contact is not selected for service by default.

It is important to note that a court can be configured to enable all contacts to see all other contacts regardless of classification. See Verified Case Contacts throughout TrueFiling to see the impact Verified contacts have on the Case Details page and the Upload pane in TrueFiling.

Verified Case Contact

A contact is classified as Verified when any of these conditions are true:

- They have filed to the case, and the filing has been accepted and marked as Filed by the court.
- They have been added as a party to a case in the court's Case Management System (CMS), and that information has been integrated with TrueFiling.
- They have been accepted by the court Clerk as a Verified contact. This is a court-configurable option that will enable the filer to submit a request to the Clerk to verify a contact when the filer:
  - Adds themselves as a contact to the case or as a service recipient for a filing.
  - Adds a non-Verified connection as a contact to the case or as a service recipient.
  - Adds other counsel as a contact to the case or as a service recipient.

  As part of this process, the filer will, via a confirmation dialog, submit a request to the Clerk to verify the added case contact or service recipient.

  If the Clerk accepts the request, the contact is then classified as Verified for the case within TrueFiling. Otherwise, the contact will remain Standard.

  A court can be configured such that, when a user is added as a case contact or a service recipient, and the user's email address is in the same domain as an existing Verified case contact, that user will be added as a Verified case contact, not a Standard contact. The court can then identify domains (such as gmail.com, yahoo.com) that will be excluded from this configuration.

Depending on court configuration, any of the following may be true:

- A Verified contact can see information (name, email address, and firm) of all other Verified contacts.
- A Verified contact won't see a Standard contact unless they are connections.
- A Standard contact will not see other Standard contacts unless they are connections.
  - If this configuration is set, other counsel added as a case contact or service recipient will not be visible.
- A Standard contact that is not a connection can't be selected for service.
- A Standard contact is not selected for service by default.

It is important to note that the court can be configured to enable all contacts to see all other contacts regardless of classification. See Verified Case Contacts throughout TrueFiling below to see the impact Verified contacts have on the Case Details page and the Upload pane in TrueFiling.

Verified Case Contacts throughout TrueFiling

The court configures how Verified and Standard case contacts function within TrueFiling. This configuration will impact the following TrueFiling pages. A sample illustration is presented for each page.

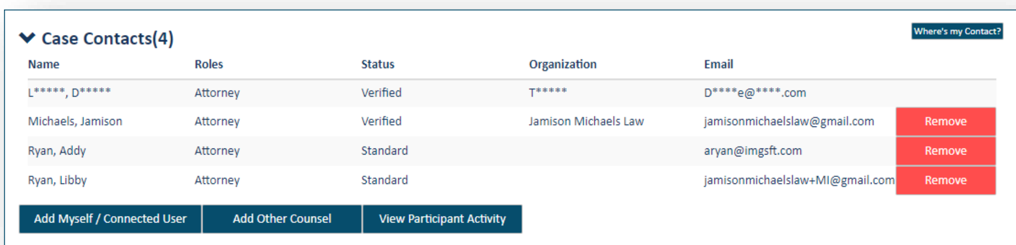
Again, the content in this section is true only for courts that classify case contacts as Verified and Standard.

- **Case Details page – Case Contacts section**

  The court can be configured so a Standard contact views Verified contacts as redacted. However, a Standard contact can view a Verified contact as unredacted if they're connections.

  In the following illustration, Addy Ryan is logged in and has accessed the Case Details page. She is a Standard contact on this case.

  - She is connected to Jamison Michaels, a Verified contact, who is shown unredacted.
  - She is connected to Libby Ryan, a Standard contact, who is shown unredacted.
  - One Verified contact, to whom she is not connected, is shown as redacted.

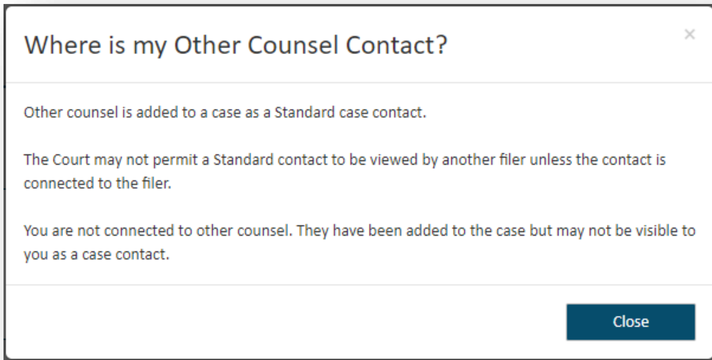


  The court can further be configured so that, when a user adds themselves, a connection, or other counsel as a case contact, they will, via a confirmation dialog, submit a request to the Clerk to verify the contact.

  If the request is accepted, the contact will be classified as Verified. Otherwise, the contact will remain a Standard contact.

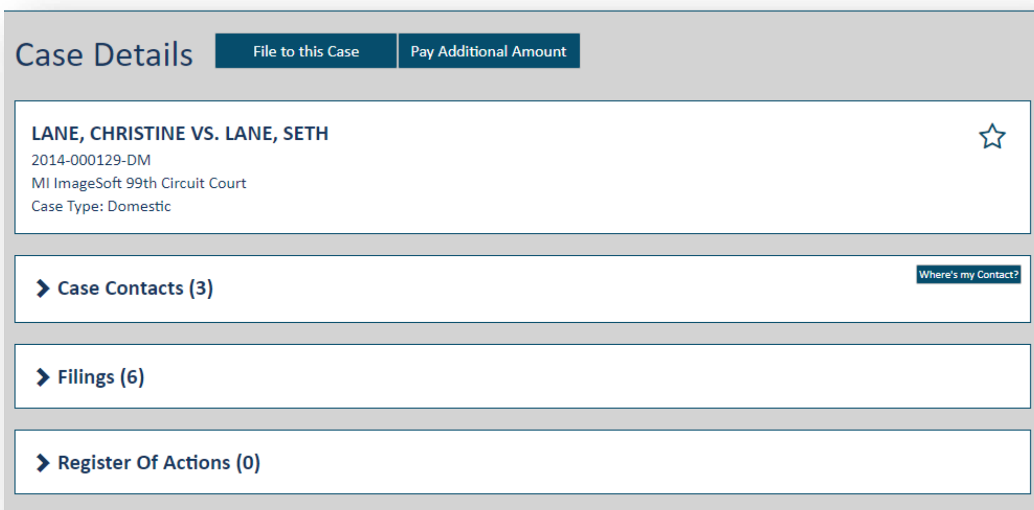
Don't see your Contact?

If you added other counsel as a case contact, and they're not listed, click the **Where's my Contact?** button to display information on when Standard contacts are listed.



- **Case Details page – Register of Actions**

  The court can be configured to prevent Standard contacts from accessing or viewing the Register of Actions for the case. If so configured, the View Register of Action button and the Request Case File button (in the Register of Actions section) will not be available to a Standard contact.



- **Upload pane – Select Service Recipients section**

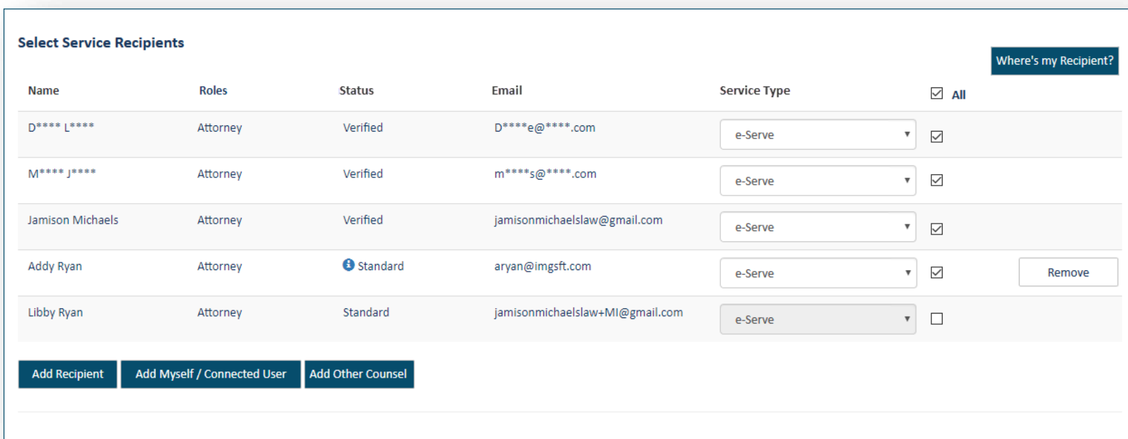
The court can be configured so a Standard contact will view Verified contacts as redacted. However, a Standard contact can view a Verified contact as unredacted if they're connections.

In the following illustration, Addy Ryan is logged in. She is not a contact for the case she's filing in. She selects herself as the filer and chooses the filing documents.

By default, she is added as a service recipient because she is the filer.

- She is connected to Jamison Michaels, a Verified contact, who is shown unredacted.
- She is connected to Libby Ryan, a Standard contact, who is shown unredacted.
- Two Verified contacts, to whom she is not connected, are shown redacted.

The court can also configure which recipients can be served. For example, the court may not allow a Standard contact that's not a connection to be selected for service.



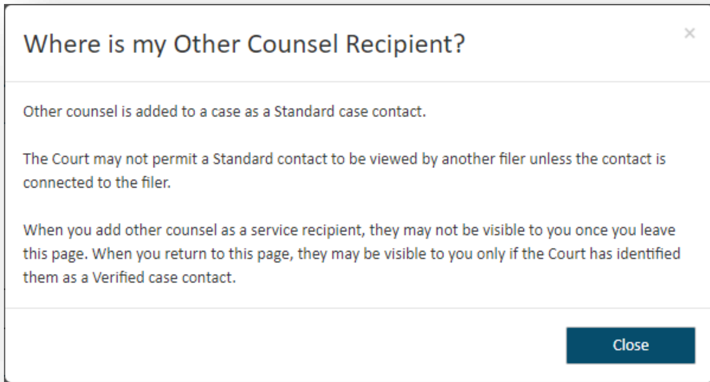
When the filing is submitted to the court, if the Clerk files the filing, Addy will become a Verified case contact. If the Clerk rejects the filing, she will remain a Standard contact.

If Addy is filing in a court that is also configured to send a case contact verification request to the Clerk, and she adds herself, a connection, or other counsel as a service recipient, as part of the process, a verification confirmation dialog will display. Addy will use that dialog to send a verification request to the Clerk for that recipient.

If the Clerk accepts the request, the recipient will be classified as a Verified contact. Otherwise, the recipient will remain a Standard contact.

Don't see your Recipient?

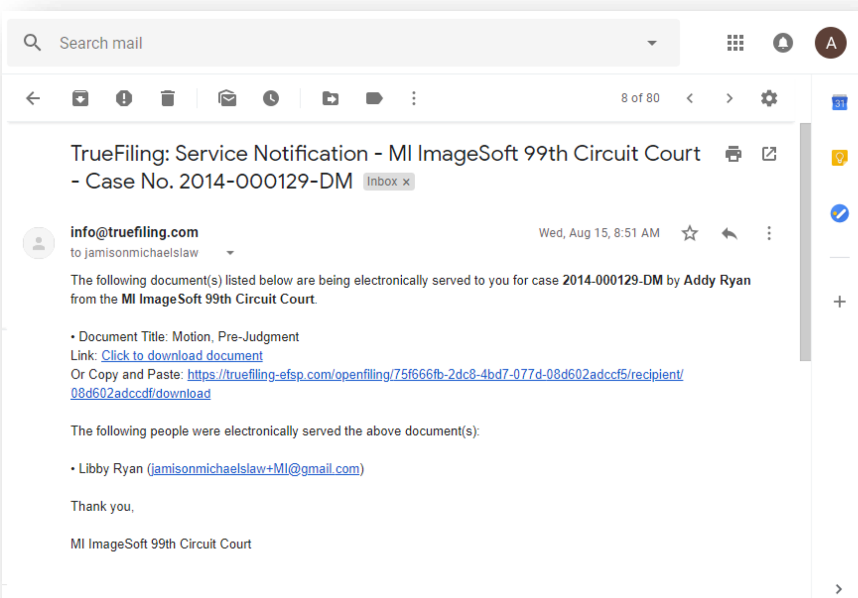
If you added other counsel as a service recipient, and they're not listed, click the **Where's my Recipient?** button to display information on when Standard contacts are listed.



Can TrueFiling Serve my Filings?

Through TrueFiling, you can eServe your case filings to others associated with the case. The parties of interest you specify will receive a servicing email when you submit your filings to the court.

The email will list all parties who were electronically served. In addition, a link is provided to download the served filing.



The court can be configured to hide the email address of each recipient.

You can also choose to serve your filings in person or through mail service. If you choose these service methods, **you are responsible for serving the filings; TrueFiling will not perform the service**.

The court can configure the email to include the names of all persons served, not just those eServed.

Each court has their own servicing requirements. Some courts require eService; for others, it's optional.

In addition, some courts will not allow any service for certain case types or for sealed or confidential filings. The court can provide information on which case types can't be served.

If the court requires a Proof of Service, and you eServe, TrueFiling will automatically generate and deliver a Proof of Service to the court. This document will list all served parties, whether electronically, in person, by mail, and, when enabled by the court, via a courtesy copy.

If allowed by the court, a single Proof of Service may be generated for all related filings submitted together.

You can download the Proof of Service TrueFiling submits to the court. See Download the Proof of Service for details.

If you choose to eServe, the court may impose an additional convenience fee. The fee is based on the filing type.

What's a User Role?

When you sign up for TrueFiling, you provide your email address and choose a password you'll use when you log in.

You'll also select which role you want associated with your login credentials. Three roles are available - Attorney, Pro Se filer, or Court Reporter. You can select one role, multiple roles, or none.

If you don't select a role, you can only file on behalf of another TrueFiling user who has specified a user role and is in your connection network.

You can edit your user role. See Manage your User Role later in this guide.

What's the Case Details Page?

The Case Details page lists information about an existing case and your interactions within that case.

Case specifics such as Court, Case Number, and Case Title

You can file to the case, view the Register of Actions, and / or identify the case as a Favorite. See File to an Existing Case, View the Register of Actions, and Add or Remove a Case as a Favorite later in this guide.

Select courts allow you to download a case file from within TrueFiling. See Request a Case File later in this section for details.

Some courts allow you to make additional payments toward a case. See Submit an Ad Hoc Payment to the Court for details.

Case contacts

A case contact can be selected for document service. You can add yourself, a connection, or other counsel (if allowed by the court) as a case contact.

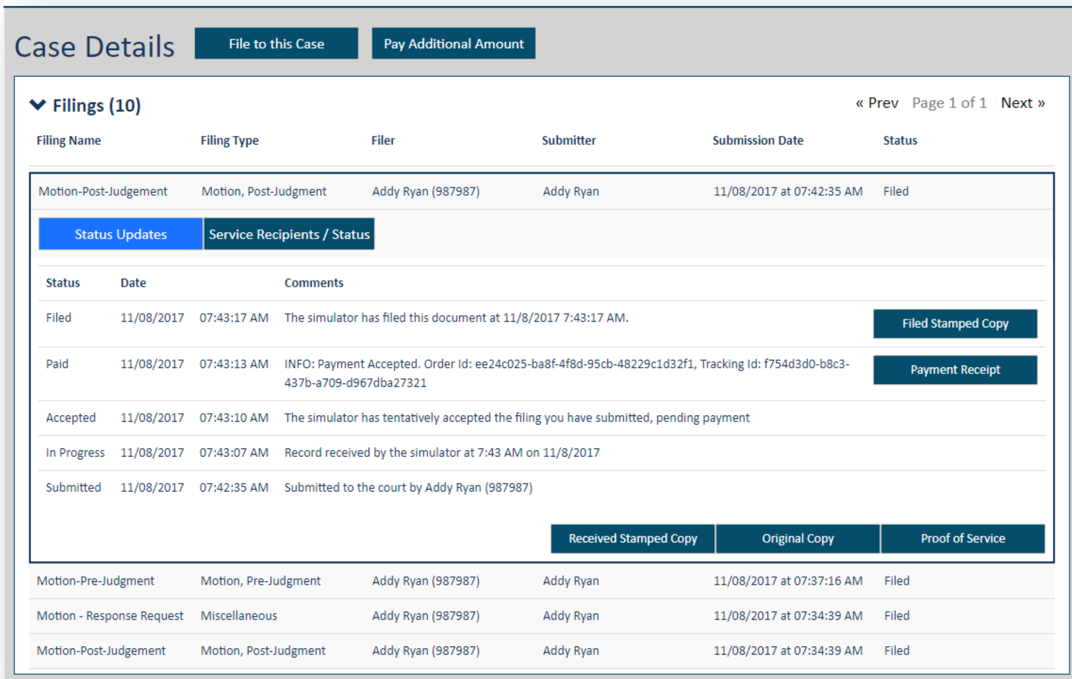
A court can be configured to classify case contacts as either Verified or Standard. A contact's classification determines if and how they can see other case contacts throughout TrueFiling, as well as if they are visible to other contacts and can be selected for servicing. A court can also classify case contacts but place no restrictions on the information displayed.

See What's a Case Contact – Verified and Standard Case Contacts earlier in this guide for details on how courts can configure case contacts.

You can also view a list of the contacts added to the case and who added them. See View Participant Activity.

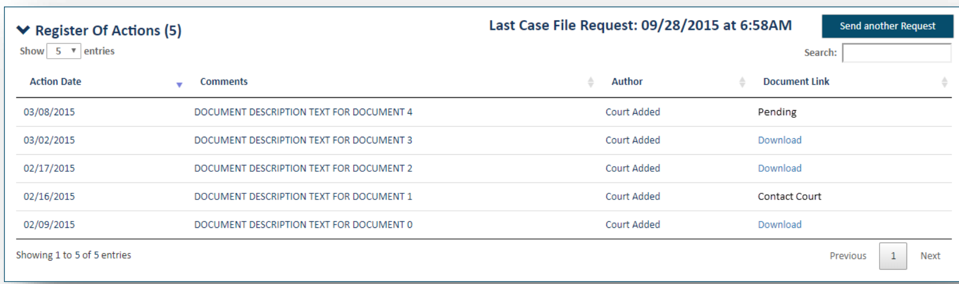
Submitted filings, their status with the court, and if they've been served and accessed (click the Filing Name to expand the pane).

You can also download documents related to a filing such as a Proof of Service, stamped copy, or payment receipt. See Download Documents Related to your Filing for details.



Request the Case File

If allowed by the court, you can request the case file and download the documents through the Register of Actions section on the Case Details page. In such instances, the Case Details page will not display the **View Register of Actions** button. See Request the Case File.



If you are not a Verified case contact, the court may not allow you to have access to the Register of Actions. See What's a Case Contact – Verified and Standard Case Contacts earlier in this guide for details on court configured limits for accessing and requesting case filings.

To access the Case Details page, do one of the following:

- Perform a search to locate your case and then select the Case Number in the search results.
- Access the History page, locate your filing, click the Filing Name, and then click the Case Number on the Properties pane.
- Access the File pane and then select the Case Number.

How can I Access my Filing History?

The History page details the filing history of you and your connections. You can select which filing history to view - only yours or your connections' histories as well.

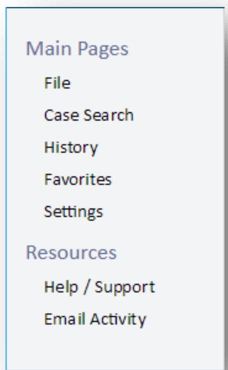
For each submitted filing, you can view the filing's properties, as well as its status in the court, and who's been served.

You can also download original and stamped copies of your filings, and any Proofs of Service and payment receipts.

The TrueFiling User Interface

TrueFiling has been designed with an intuitive user interface that enables you to easily and quickly upload filing documents, specify service recipients, and submit the filings to the court.

The navigation pane, which is located on the left side of the interface, allows you to quickly access whatever functionality you need - whether it's searching for a case to file against, creating a filing for court submission, adding a payment account, or specifying your notification settings.



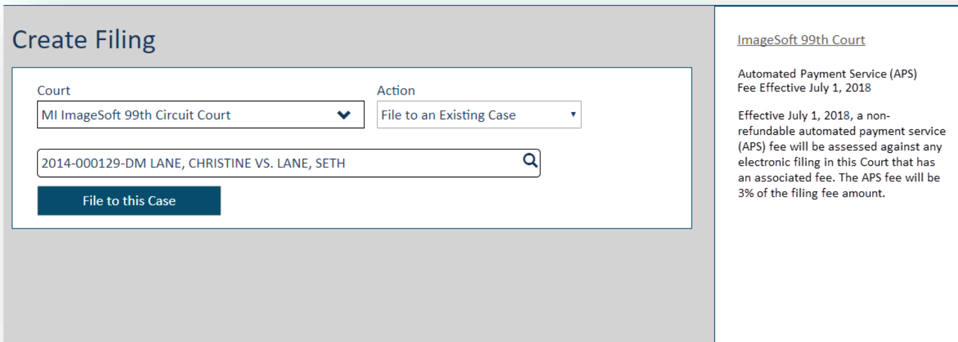
Main Pages	
File	Use to file against an existing case or to initiate a new case. See File to an Existing Case or Initiate a New Case.
Case Search	Use to locate an existing case. Once located, you can launch the Case Details page where you can start the filing process, add case contacts, view submitted filings, and download related documents. See Perform a Search to Access your Case.
History	Use to view and access the filing and payment histories of yourself and your connections. See Filing History and Properties.
Favorites	Use this page to quickly access cases you've identified as Favorites. See Add or Remove a Case as a Favorite.
Settings	Use to view and specify details regarding your contact information, connections, payment accounts, and notification settings. See Update your Contact Information, Manage your User Role, TrueFiling Connections, Manage your Payment Accounts, and Specify your Notification Settings.
Resources	
Help / Support	Use to access our TrueFiling Help system, which includes downloadable versions of the TrueFiling User Guide and the Quick Start Guide, as well as training and quick videos.
Email Activity	Use to view details on issues related to your email address or the email address of one of your connections. See Are Emails from TrueFiling being Blocked? for details.

Court Message Pane

The court can publish special information and messages on these pages:

- Create Filing page
- Case Search page
- Case Details page

To illustrate using the Create Filing page:



Once you select the court, any information or messages specific for that court are displayed on the right side of the page.

If no messages have been configured by the court, the pane will not display.

TrueFiling Connections

TrueFiling uses connections to build a network of firm attorneys, firm members, pro se filers, and court reporters.

When you add a registered TrueFiling user to your connection network, that user will be able to file on your behalf, and you can file on their behalf. Connections can also see each other's filing and payment histories and can use shared payment accounts. **As a result, it's important to send a connection request only to trusted persons such as co-counsel or other TrueFiling users in your firm.** You are responsible for any filing, service, and payment actions that you or your connected users make as a result of a connection.

A connection can be added to a case as a case contact and also selected as a service recipient for your filing documents.

When you ask another TrueFiling user to join your connection network, the next time they log in to TrueFiling, a Connection Request notification will display in the top menu bar. They'll also receive an email letting them know someone wants to connect.

To become part of your connection network, they MUST log in to TrueFiling and accept your request. They won't be an active connection until they accept the request.

You can connect only with a TrueFiling user whose email address has been confirmed. See Sign up for TrueFiling for details on email confirmation.

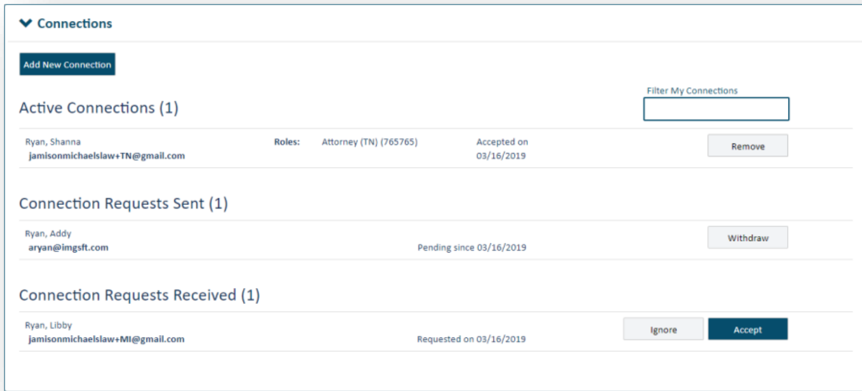
Some courts may allow only TrueFiling users whose user role is Attorney to send a connection request. In such courts, if your user role is not Attorney, you won't be able to send a connection request.

Just as you can send a connection request, you may receive a request from other TrueFiling users in your organization.

To view your connections:

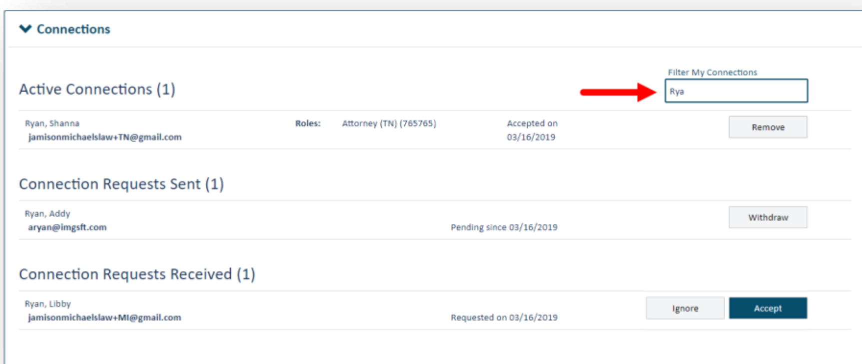
1. Click **Settings** under Main Pages in the navigation pane.
2. On the Settings page, expand the **Connections** pane.

Your active connections, connection requests you've sent, and connection requests you've received are listed.



Filter the Connections Listed

You can filter your existing and potential connections listed in the Connections pane.



Input part or all of a name, email address, or role in the **Filter My Connections** field. Filtering begins once you input three characters.

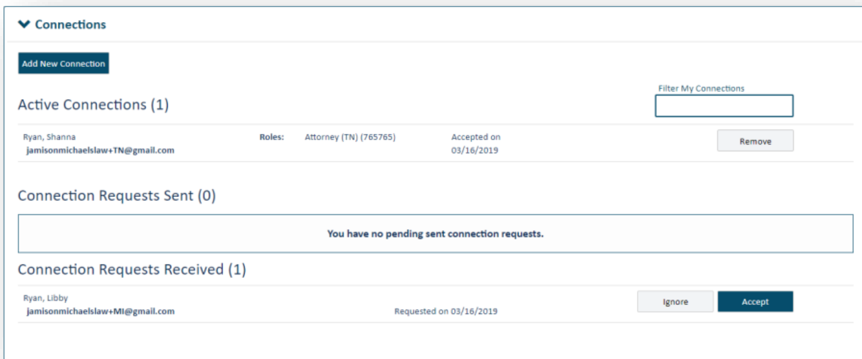
It’s important to understand that the filter applies only to existing or potential connections. Do not use this field to search for someone to whom you’re not yet connected.

Add a New Connection

You can connect only with a TrueFiling user whose email address has been confirmed. See Sign up for TrueFiling for details on email confirmation.

To ask someone to join your connection network:

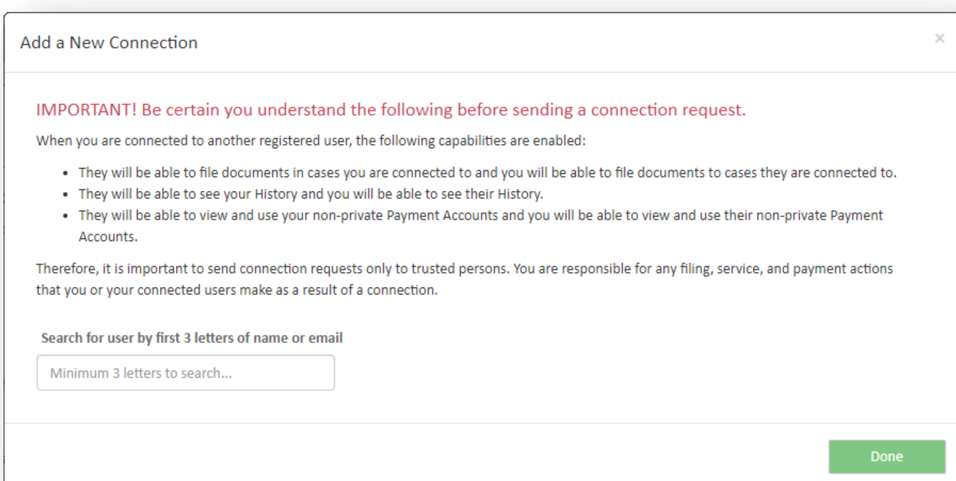
1. Click **Settings** in the navigation pane.
2. On the Settings page, expand the **Connections** pane.



3. Click **Add New Connection**.

Some courts may allow only TrueFiling users whose user role is Attorney to send a connection request. If you're filing in such a court, and your user role is not Attorney, the **Add New Connection** button is not visible.

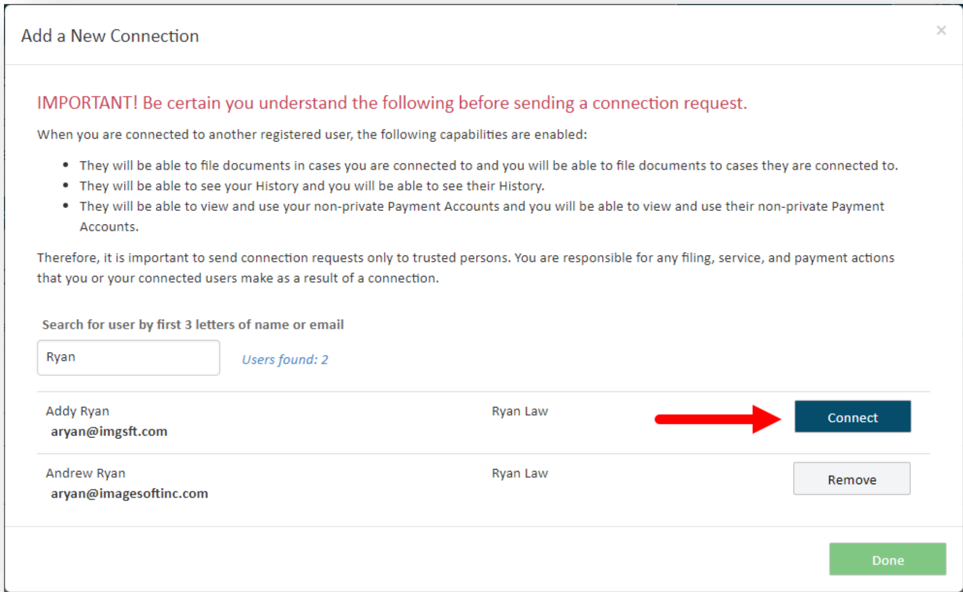
This dialog will display. Read it carefully and be certain you understand how TrueFiling connections work. See TrueFiling Connections earlier in this guide for more information.



If you don't want to continue to add the connection, click **Done**.

4. If you want to continue, input the name or email address of the person you want to add as a connection. Matching entries are listed after three characters are input.

   The entries listed will include TrueFiling users you're already connected to and those you can connect to. A message will display if no matching entries are found.

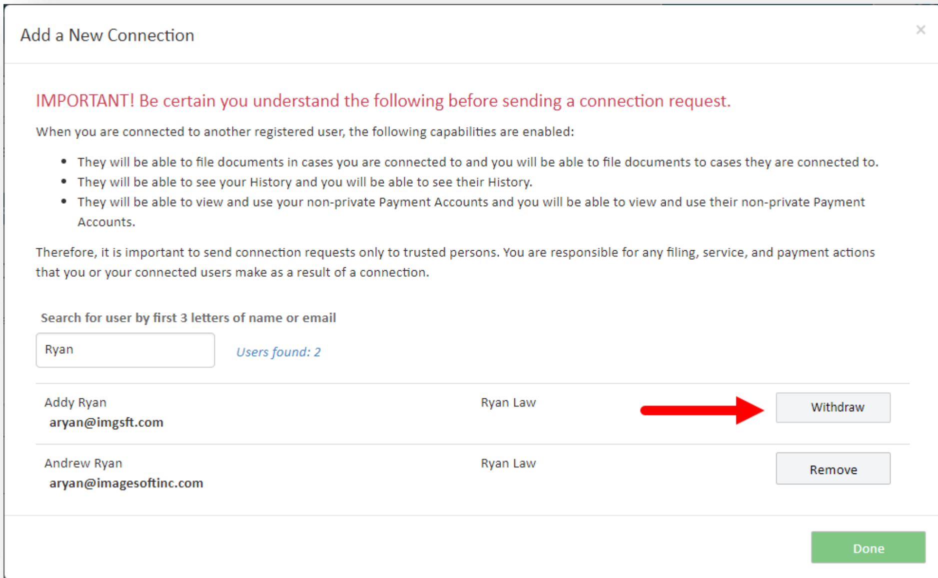


5. Locate the person you want to add as a connection.

   If more than five results are returned, a scroll bar is placed on the right edge of the dialog. Scroll through the results to locate the person you want to add.

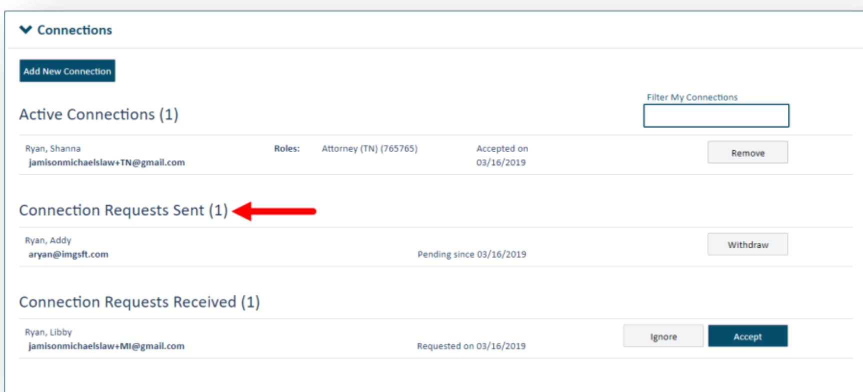
6. Click the **Connect** button beside the person to add. The connection request email will be sent. The potential connection will see a Connection Request notice when they log in to TrueFiling.

If you clicked **Connect** in error, you can click the **Withdraw** button. The Connection Request notice won't display when the user logs in; however, the request email is still sent to them.



7. Click **Done** when you're finished.

   Your potential connection is listed in the **Connection Requests Sent** section of the Connections pane; their status is **Pending**.



To become part of your connection network, they MUST log in to TrueFiling and accept your request. They won't be an active connection until they accept the request.

Their name will be added to your list of Active Connections with a status of **Accepted**.

Withdraw a Connection Request

If you invite someone to become a connection in error, you can withdraw the connection request before they accept it.

1. Click the **Withdraw** button in the Connection Requests Sent section of the Connections pane.
2. On the confirmation dialog, click **Yes** to confirm; click **No** to cancel the withdrawal.

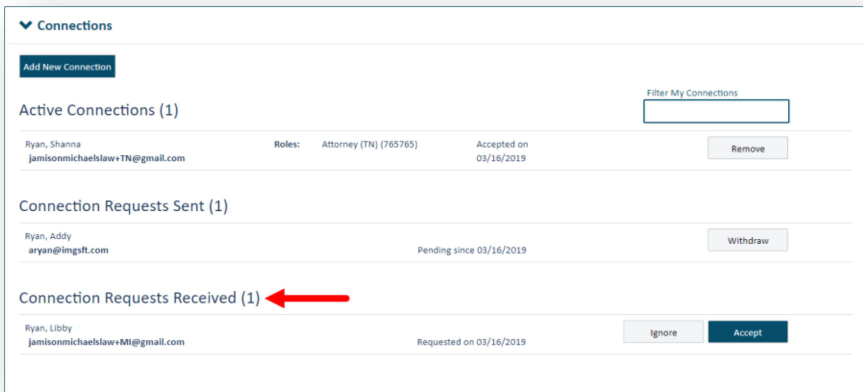
The Connection Request notice won't display when they log in; however, the request email is still sent.

Accept a Connection Request

When you log in to TrueFiling, a **Connection Request** button in the menu bar will display the number of connection requests that are awaiting your response.

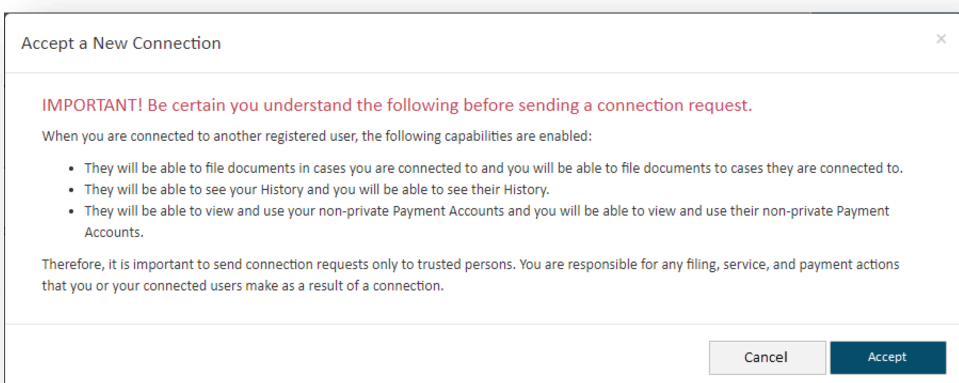
1. Click the button to be directed to the Connections page.

   The Connection Requests Received section lists connection requests you've received from other TrueFiling users.



2. If you don't want to accept the request, click **Ignore**. The dialog will close, and the request will be removed from Connections pane.
3. Click **Accept** to accept the request.

   This dialog will display. Read it carefully and be certain you understand how TrueFiling connections work. See TrueFiling Connections for more information.



   If you don't want to accept the request, click **Cancel**. You'll be returned to the Connections pane where you can click **Ignore** to reject the request.

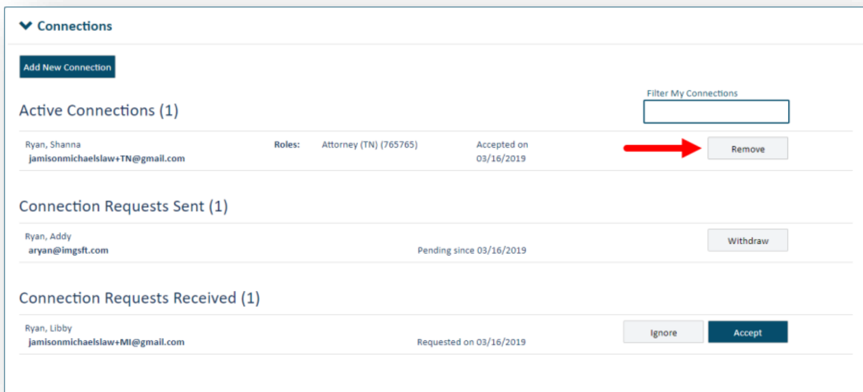
4. If you want to add this person to your connection network, click **Accept**.

Your new connection will be listed in the Active Connections section. Their status will be **Accepted**.

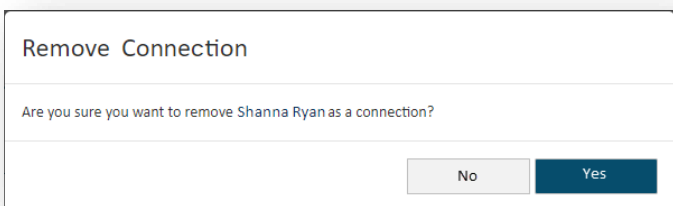
Remove a Connection

If you remove a connection, you won't be able to file on their behalf, access their filing and payment histories, or use any shared payment accounts.

1. Click **Settings** in the navigation pane.
2. On the Settings page, expand the **Connections** pane.
3. Locate your connection.



4. Click **Remove**.



5. Click **Yes** to confirm.

You can also remove a connection through the Add a New Connection dialog.

If this connection was added as a case contact for an existing case, they'll remain a contact unless you access the Case Details page for each case and remove them as a contact.

Specify your Notification Settings

All filings undergo a review and acceptance process before being officially filed or rejected by the Clerk's office or the court. You can choose to be notified via text message and/or email when your filing's status changes or when activity is performed on it.

You can also be notified when changes are made to your password or payment accounts.

If you want to be notified via text message, your contact information must include a validated mobile phone number. See Update your Contact Information for details.

Manage your Notification Settings

You can be notified when:

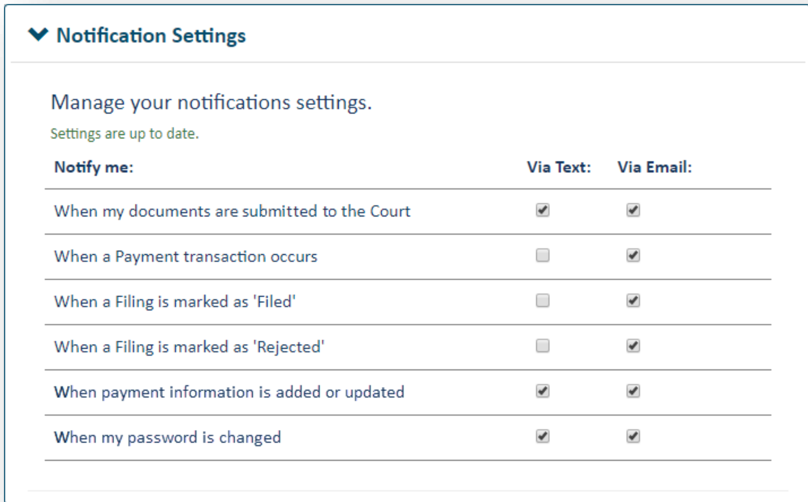
- Your filing documents are submitted to the court
- A payment transaction occurs
    - You'll also receive this notification when an ad hoc payment transaction occurs.
    - If a payment is rejected, you'll be notified if you have selected either "When a Payment transaction occurs" or "When a Filing is marked as Rejected."
    - You won't be notified if the payment amount is $0.00.
- Your filing is marked as Filed or Rejected
    - By default, you'll be notified when a filing is marked as Rejected and when a filing is marked as Filed. You can change those settings here.
- Payment information is added or updated
    - This notification helps ensure the security of your TrueFiling payment accounts. If you didn't add a payment account or modify an existing one, but you receive this notification, your payment accounts may have been compromised. Your notification will contain a link you can select to launch TrueFiling and access your payment account information.
- Your password is changed
    - This notification helps ensure the security of your TrueFiling account. If you didn't change your password, but you receive this notification, your account may have been compromised. Your notification will contain a link you can select to launch TrueFiling and reset your password.

In some courts, a Clerk can send an email message to a filer through the court's filing review process. This notification setting is not configurable in TrueFiling.

The comments in the email will be displayed on the Status Updates tab on the History page and in the Filings section of the Case Details page. Its status will be "In Progress."

To select your settings:

1. Click **Settings** under Main Pages in the navigation pane.
2. Expand the **Notification Settings** pane.



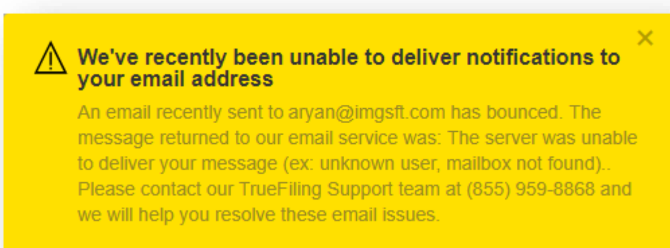
If you want to be notified via text message, your contact information must include a validated mobile phone number. See Update your Contact Information for details.

3. Select the appropriate option and notification method.

   You'll receive one notification for each action applied to each filing you submit.

   Some courts may eNotice (email) a filer when their filing is either filed or rejected irrespective of their notification settings.

If TrueFiling can't deliver notifications or eServed filings to your email address, you'll be notified via an email failure notice dialog when you log in to TrueFiling. It will resemble:



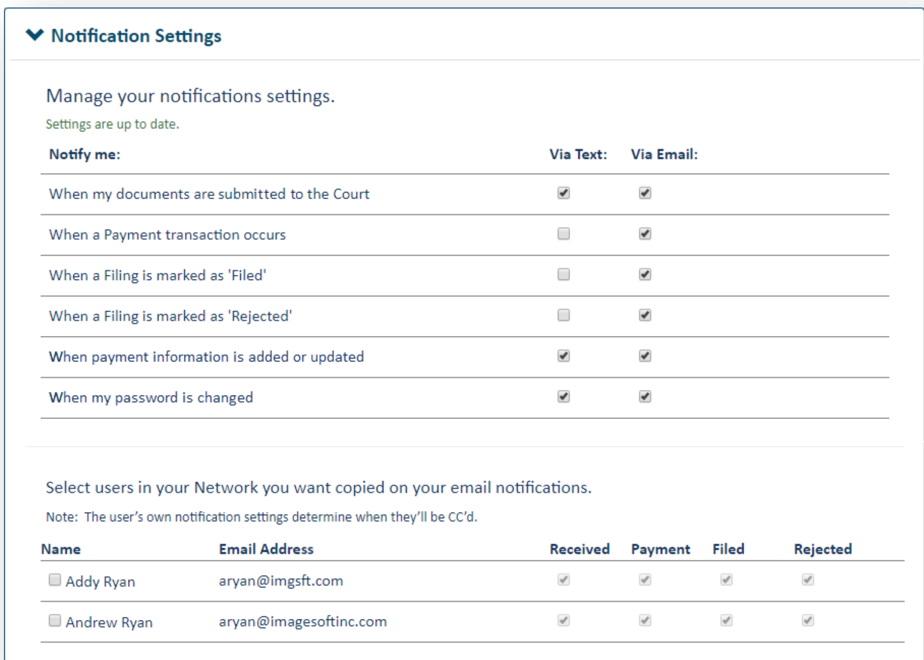
Contact TrueFiling Support to resolve the issue.

Copy Email Notifications to a Connection

You can select one or more of your connections to be copied whenever you receive an email notification from TrueFiling or the court regarding your filings.

IMPORTANT: Each connection's notification settings determine when they'll be copied. For example, if a connection chooses to be notified only when a filing is marked as rejected, they will be copied only on the "Filing Rejected" emails you receive.

1. Click **Settings** under Main Pages in the navigation pane.
2. Expand the **Notification Settings** pane.



You can copy your connections only on emails that relate to your filings and their status with the court. You can't copy connections regarding changes to your payment accounts or password.

3. Select the checkbox beside each connection you want copied.

Before You File to a Case

Before filing to a case, you may need to perform some preliminary actions such as:

- Perform a search to locate the case. In the search results, select the case number to launch the Case Details page. In addition to the specifics of the case, this page lists the case contacts currently associated with the case. See Perform a Search to Access your Case below.
- Add a case contact. This person can be you, a connection, or a member of other counsel (if allowed by the court). You can subsequently select a case contact as a service recipient for your submitted filings.
- Add the case as a Favorite, so you can access the Case Details page quickly through the Favorites page.

Perform a Search to Access your Case

TrueFiling has a list of every case that's been assigned a permanent case number for each court that participates in electronic filing. The case list is updated each day with the previous day's newly created cases.

To access your case:

1. In the navigation pane, select **Case Search** under Main Pages.
2. Click the **Court** field and select the court from the list displayed.
3. Input the **Case Number** or **Case Title**. In some courts, you may be able to input part or all of the number or title. See **Search Tips** below.

   A court can configure a different label for the **Search** field. Therefore, your search may not be based on case number or case title.

4. To limit your search results to cases that were opened within a specific date range, select the checkbox beside **Search by Date**. Input search start and end dates in the fields. Using this filter is optional.
5. Click **Search**.

   If more than 50 results are returned, and your case isn't listed, enter more detailed search parameters and click **Search** again.

6. Locate your case in the search results and click the case number to launch the Case Details page. From this page, you can select the **File to the Case** option to file against the case.

   If you selected the wrong case and launched the wrong the Case Details page, click your browser's **Back** arrow button to return to the Case Search page. Your original search results will be listed.

Re-order your Search Results

By default, search results are ordered by the Case Title column in ascending (A-Z) order.

You can sort on a different column heading to re-order how the results are displayed.

- Click a heading once to sort in descending (Z to A / newest to oldest) order.
- Click again to sort in ascending (A to Z / oldest to newest) order.

Search Tips

For best results, don't make your search criteria too specific. Often, a search performed using less information returns better results.

When you search by case title, remember that if the title contains a litigant name, the order the name appears in the title may vary by court. For example, some case titles may order the litigants' names as:

Smith, Samantha v. Jones, John

If you search by case title and input Samantha Smith, the search results won't contain your case.

Thus, make sure you enter the name in the **Search** field in the proper order or search for only the first or last name.

Add or Remove a Case Contact

You can add yourself or a connection as a case contact, and if the court permits, you can also add other counsel. Once added to a case, a contact can subsequently be selected for servicing a case filing.

You'll add a contact through the Case Details page. Also, when a registered TrueFiling user is added as a service recipient to a case filing, they will be added as a case contact.

Verified and Standard Case Contacts

A court can be configured to classify case contacts as either Verified or Standard. A contact's classification determines if and how they can see other case contacts throughout TrueFiling, as well as if they are visible to other contacts and can be selected for servicing. A court may also classify case contacts but place no restrictions on the information displayed.

A court may not be configured to classify contacts. In these courts, a case contact is visible to all, and any contact can be selected for service.

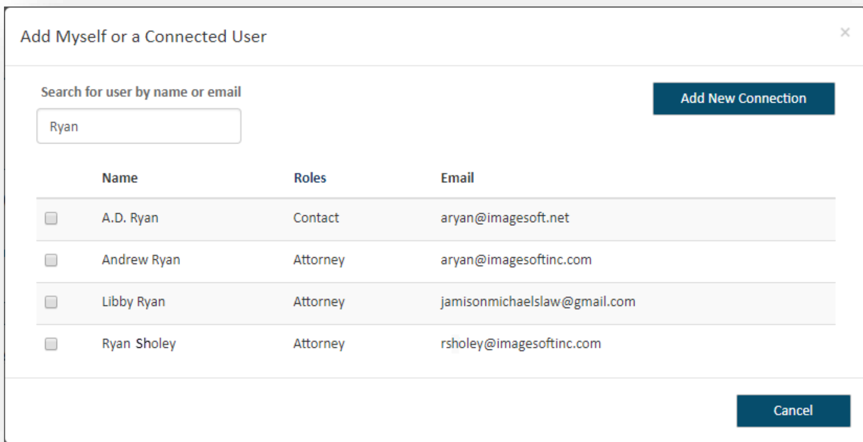
See What's a Case Contact >> Verified and Standard Case Contacts earlier in this guide for more details.

Add Yourself or a Connection as a Case Contact

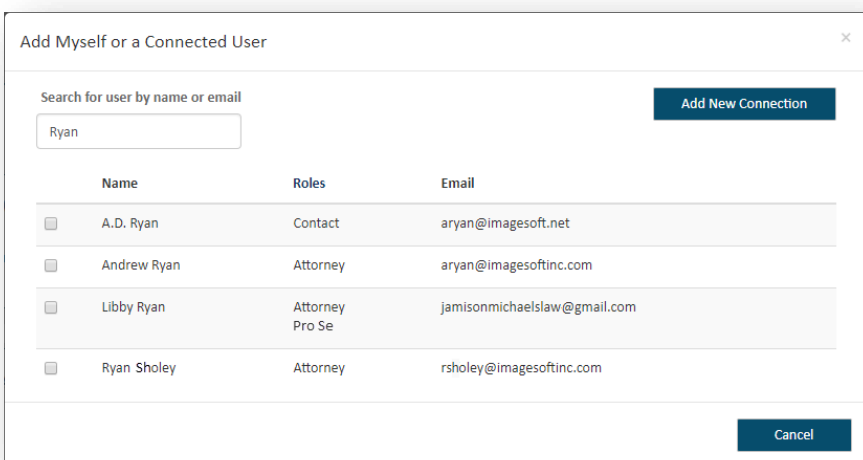
You can add yourself or a connection as a contact.

1. Launch the appropriate Case Details page. Perform a case search, if needed, and select the Case Number from the search results.
2. Review the Case Contacts section to ensure the person you want to add isn't already listed.
3. Click **Add Myself / Connected User**.

   A dialog listing your connections that are not contacts for this case is displayed. Only people that have accepted your connection request are listed.



If you or a connection has more than one TrueFiling user role, each role will be listed. Be aware, when you add a case contact, you're adding a person, not a specific role.

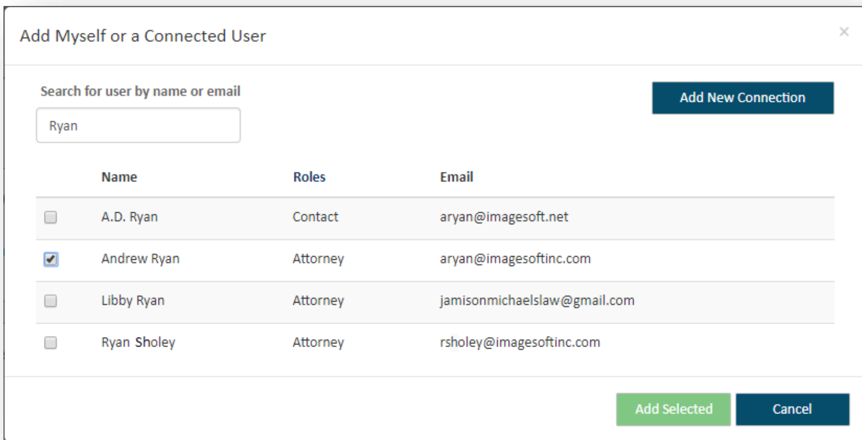


If the case contact you add has multiple roles, each role will be listed for that contact in the Case Contacts section.

4. To filter the connections listed, input the name or email address of the connection you're looking for in the **Search** field. Matching entries are listed after three characters are input.

   If you need to add a new connection, select the **Add New Connection** button. View details on this process at Add a New Connection.

   Some courts may allow only TrueFiling users whose user role is Attorney to send a connection request. If you're filing in such a court, and your user role is not Attorney, the **Add New Connection** button is not visible.



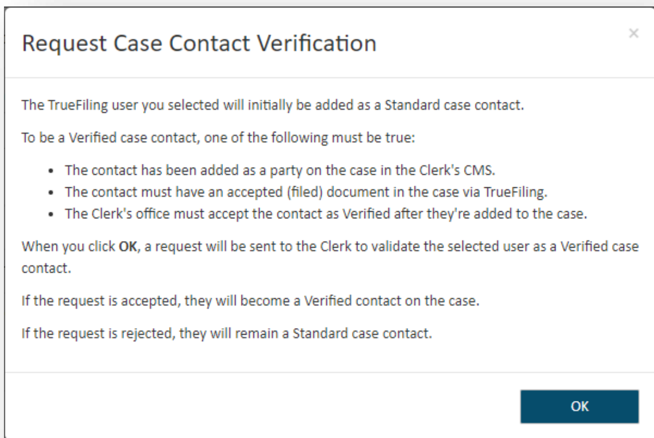
5. Locate the connection to add as a contact.
6. Select the checkbox beside their name.
7. Click **Add Selected**.

   The contact is added to the Case Contacts list. They can be selected for servicing when you create your filing.

Verified Contacts

Courts configured to use Verified and Standard case contacts can be further configured such that, when a user is added as a case contact or a service recipient, and the user's email address is in the same domain as an existing Verified case contact, that user will be added as a Verified case contact. The court can subsequently identify domains (such as gmail.com, yahoo.com) that will be excluded from this configuration.

Also, if a court is configured to use Verified and Standard contacts AND is also configured to submit a verification request to the Clerk when a case contact or service recipient is initially added as a Standard contact, this dialog is displayed when you select Add Selected:



When you click **OK**, a request is sent to the Clerk's office to verify the contact. The dialog will close, and the contact is added to the case as a Standard contact.

If the Clerk accepts the verification request, the contact will be classified as Verified. Otherwise, the contact will remain a Standard contact.

Note: If the court is configured to prevent a Standard contact from viewing a Verified contact that's not a connection, the Case Contacts section will display as:

See What's a Case Contact >> Verified and Standard Case Contacts earlier in this guide for more information on Verified contacts.

Remove a Case Contact

If you or any of your connections are case contacts, you can remove them by clicking **Remove**. You can't remove contacts that were added as other counsel.

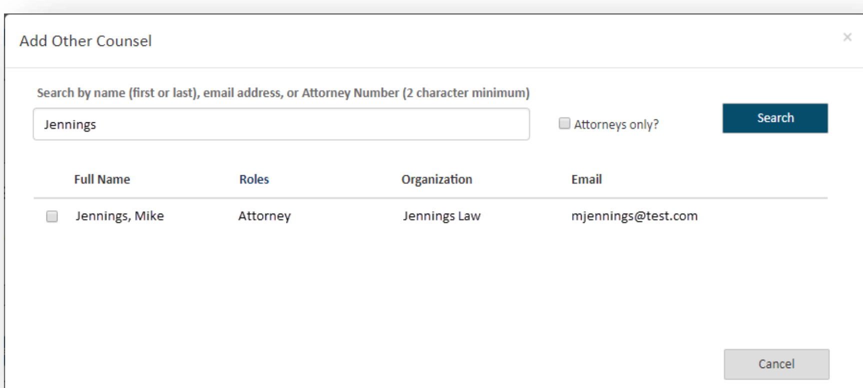
Add Other Counsel as a Case Contact

If allowed by the court, you can add counsel from another firm as a case contact.

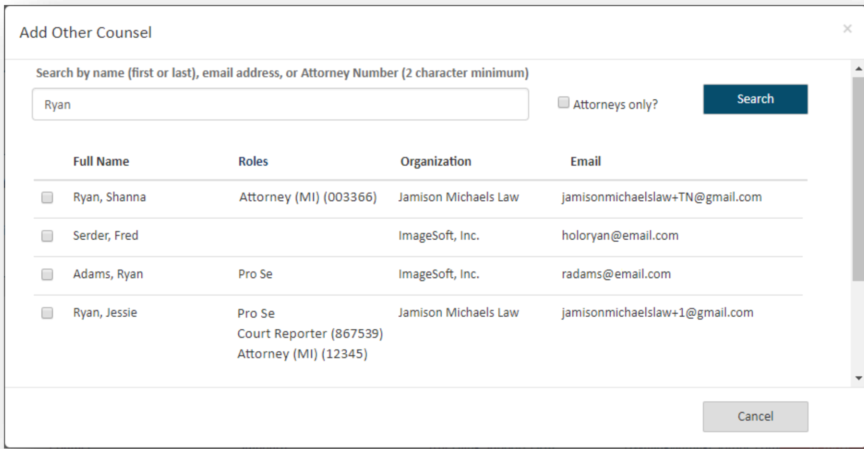
If not allowed, the **Add Other Counsel** button will not be visible.

Other counsel added as a case contact can be removed from the case ONLY by that person or one of their connections.

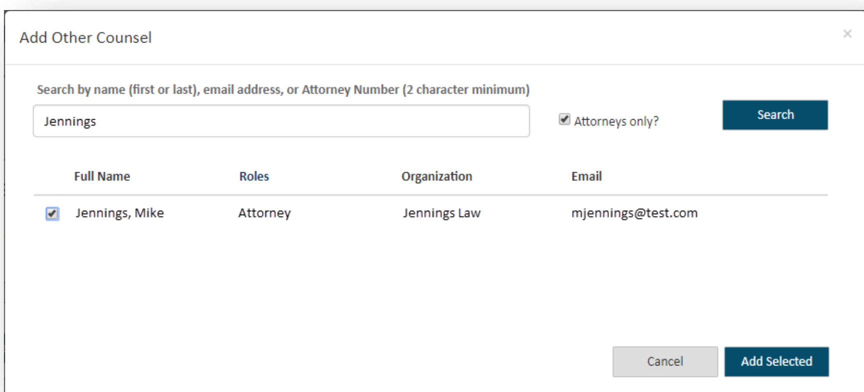
1. Access the Case Details page.
2. In the Case Contacts section, click **Add Other Counsel**.



If counsel has more than one TrueFiling user role, each role will be listed. Also, if they are a TrueFiling attorney in multiple states, each instance is listed. Be aware, when you add a case contact, you're adding the person, not a specific role.



If the contact you add has multiple roles or is registered for multiple states, each instance will be listed for that contact in the Case Contacts section.



3. Input their **Name** (first or last), **email address**, or **Attorney Number**. A minimum of two characters is required.

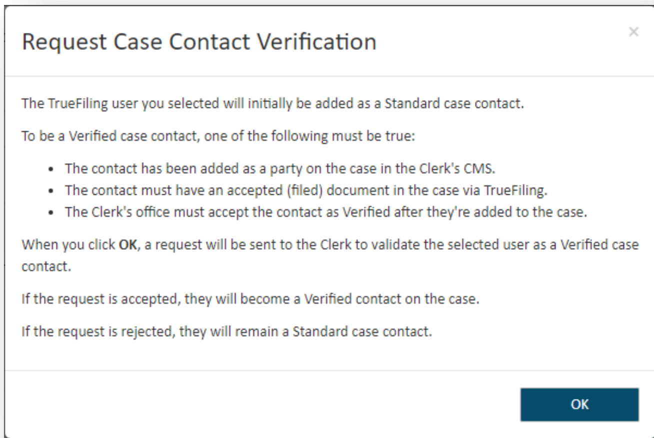
   By default, any person registered in TrueFiling (attorney, court reporter, or pro se filer) will be included in the search results. If you want to search only for registered TrueFiling attorneys, select the checkbox beside **Attorneys Only**.

4. Click **Search**.
5. Select the checkbox beside the person you want to add.
6. Click **Add Selected**. The contact is added. They can be selected for servicing when you create your filing.

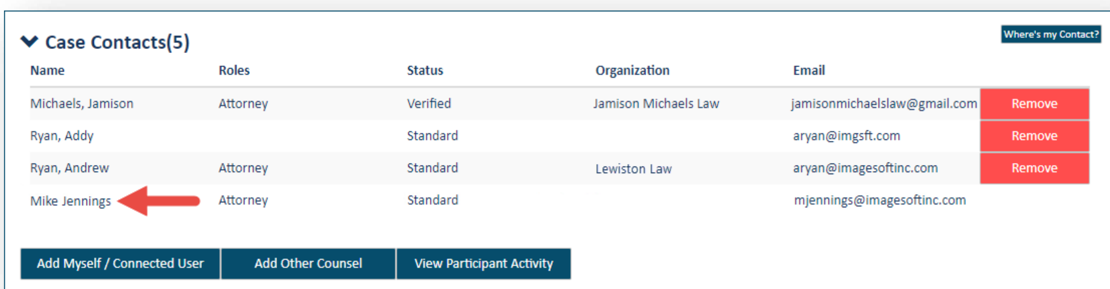
You can't remove contacts you're not connected to. As a result, the **Remove** option isn't available in the Case Contacts section.

Verified Contacts

If the court is configured to use Verified and Standard contacts AND is also configured to submit a verification request to the Clerk when a case contact or service recipient is initially added as a Standard contact, this dialog is displayed when you select Add Selected:



When you click **OK**, a request is sent to the Clerk's office to verify the contact. The dialog will close, and the contact is added to the case as a Standard contact.



If the Clerk accepts the verification request, the contact will be classified as Verified. Otherwise, the contact will remain a Standard contact.

If the court is configured such that a Standard contact that's not a connection will not be visible, any other counsel added will not be listed in the Case Contacts section. This is because you will not be connected to a member of other counsel.

See What's a Case Contact >> Verified and Standard Case Contacts earlier in this guide for information on Verified contacts.

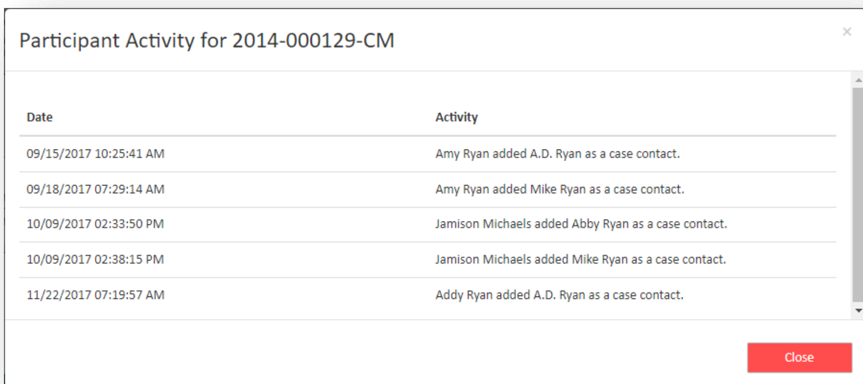
View Participant Activity

You can view a list of who was added or removed as a case contact, who added / removed them, and when the action occurred.

1. In the Case Contacts section of the Case Details page, click the **View Participant Activity** button.

   If a court is configured to classify case contacts as Verified or Standard and if the court redacts Verified contact information from Standard contacts, this button is visible only to Verified contacts.

   A dialog displays the case contact details. The list is ordered oldest to newest.



2. Click **Close** to close the dialog.

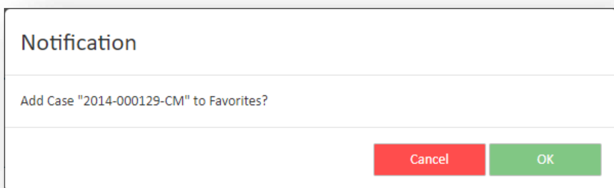
Add or Remove a Case as a Favorite

If you access a case frequently, you can make it a Favorite case. Once it's a favorite, you can access the Favorites page (**Main Pages >> Favorites** in the navigation pane) and select the Case Number to quickly launch the Case Details page.

Add a Case as a Favorite

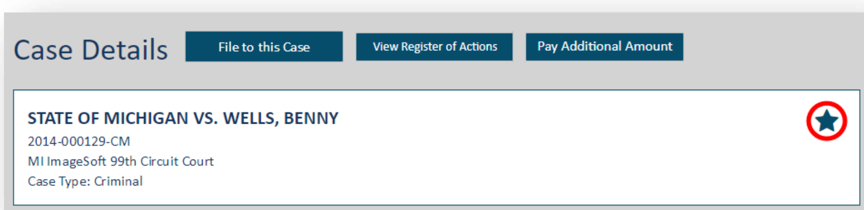
1. Launch the appropriate Case Details page. Perform a case search, if needed, and select the Case Number from the search results.

2. Click the star in the Details pane. You'll be asked to confirm.

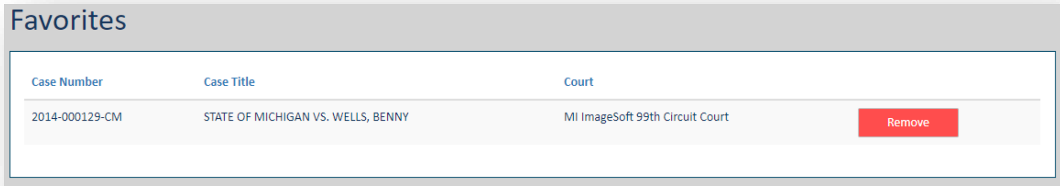


3. Click **OK**.

   The star in the Details pane will be filled, which indicates the case is a favorite.



The case will be listed on the Favorites page.



Remove a Case as a Favorite

1. Select **Favorites** under Main Pages in the navigation pane.
2. Locate the case.
3. Click the **Remove** button. The case is no longer a favorite. You can still access the Case Details page; you just can't do it through the Favorites page.

You can also remove a case as a favorite from the Case Details page.

1. In the Details section, click the Favorites star (which will be filled to indicate it's a favorite). You'll be asked to confirm the removal.
2. Click **OK**.

   The case is no longer a favorite, and the star is empty.

File to an Existing Case

If a case is accessible through TrueFiling, you can file to it.

You can upload multiple case filings and submit them together to the court for review. All filings submitted together must be for the same case.

You can choose to file, serve, or file and serve the filings. If you choose to serve, you'll need to select the service recipients and specify how they are to be served.

If the court requires a Proof of Service, and you eServe, TrueFiling will automatically generate and deliver a Proof of Service to the court. The court may be configured to generate a single Proof of Service for filings submitted together.

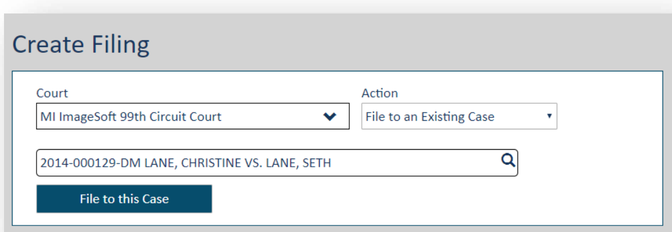
You may need to perform some preliminary actions before you file, such as searching for the case and accessing the Case Details page to specify case contacts. See Before You File to a Case earlier in this guide.

If no preliminary actions are needed, select **File** in the navigation pane to launch the File pane where you'll begin the filing process.

File to the Case

Once you've located your case and added any required case contacts, you can upload the filing documents and select your service recipients.

1. Click **File** under Main Pages in the navigation pane.
2. Select the **Court** you'll file in.
3. Click **File to an Existing Case**.



4. Input part or all of the **Case Number** or **Case Title** in the **Search for Case** field.

   A court can configure their own criteria requirements for the Search field. Therefore, your search may not be based on case number or case title.

5. Click the **Search** icon.

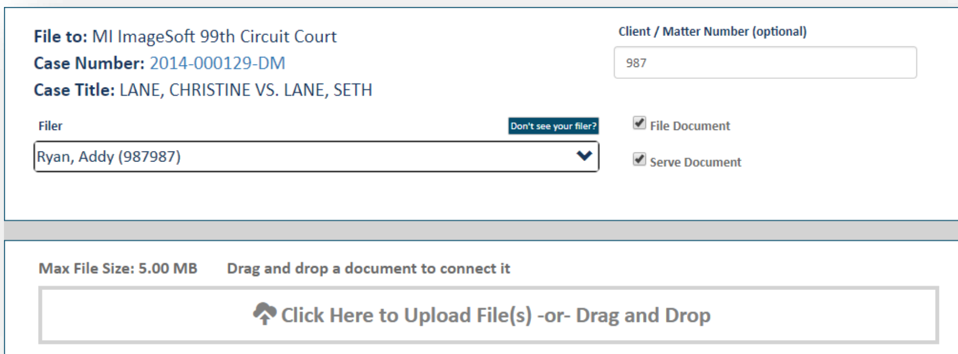
Search Tips

If more than 5 cases are returned, refine your search by entering more detailed information.

You can also select the **click here** link in the search results pane to be directed to the Case Search page. Here you can perform a more advanced search by adding a date range to your search criteria.

Once you locate your case in the search results pane, click the Case Number to launch the Case Details page. From here, you can select the **File to this Case** button and proceed to the File and Upload panes where you can select your filer and upload your filing documents, respectively.

6. Select the case from the list displayed.
7. Click the **File to this Case** button. The File pane is displayed.



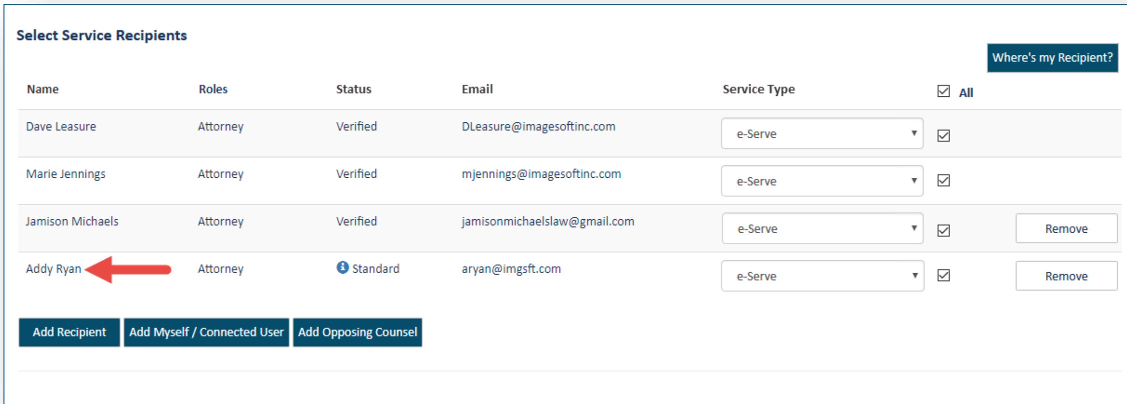
8. Click in the **Filer** field to display a list of possible filers.

   This list is populated with eligible filers you're connected to. If you have an assigned user role, your name will be listed as well. If the filer you want isn't listed, click **Don't see your filer**. See Where's my Filer in the next section for details.

9. Select the **Filer**.

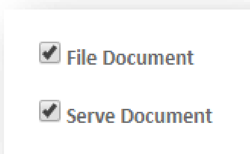
   If the selected filer is not already a case contact for the case, they will be automatically added as one once the filing is submitted.

If the court you're filing in is configured to use Verified and Standard contacts, and the selected filer is not a case contact, they will be added as a service recipient and selected for service by default. The filer is identified as a Standard contact.



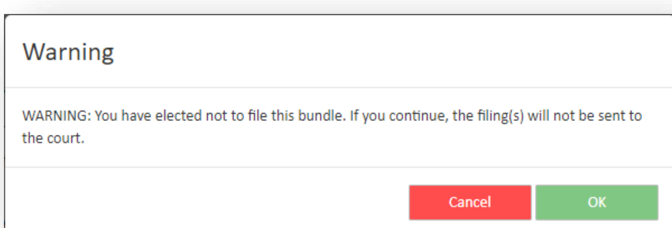
If the Clerk files the filing submitted to the court, the filer will become a Verified case contact. Otherwise, they will remain a Standard contact.

10. Input a **Client/Matter Number**, if it's required.



11. To file the document with the court, ensure **File Document** is selected.

IMPORTANT: If you de-select this option, your filing will NOT be sent to the court, and a confirmation dialog is displayed.



Click **OK** to continue without filing the document. If you click **Cancel**, the **File Document** option is re-selected.

12. If you want to serve your filings to parties of interest in the case, select **Serve Document**. If you select this option, you'll need to specify the service recipients and the servicing method. See Select the Service Recipients later in this section.

To continue the filing process:

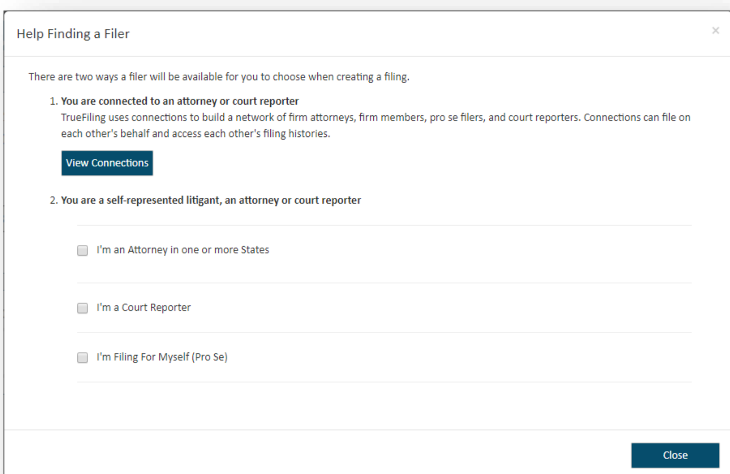
Upload your Documents / Download a Court Form / Create a Document
Select the Service Recipients
Save your Filing
Request a Fee Waiver
Submit your Filing to the Court

Where's my Filer?

When you access the **Filer** field, the filers available for you to select are either:

- An attorney, court reporter, or self-represented (pro se) litigant in your TrueFiling connection network on whose behalf you can file
  OR
- Yourself - registered as a TrueFiling attorney, court reporter, or self-represented (pro se) litigant

If the filer you want isn't listed in the Filer field, click the **Don't see your filer** button. A dialog is launched that explains how the **Filer** field is populated.



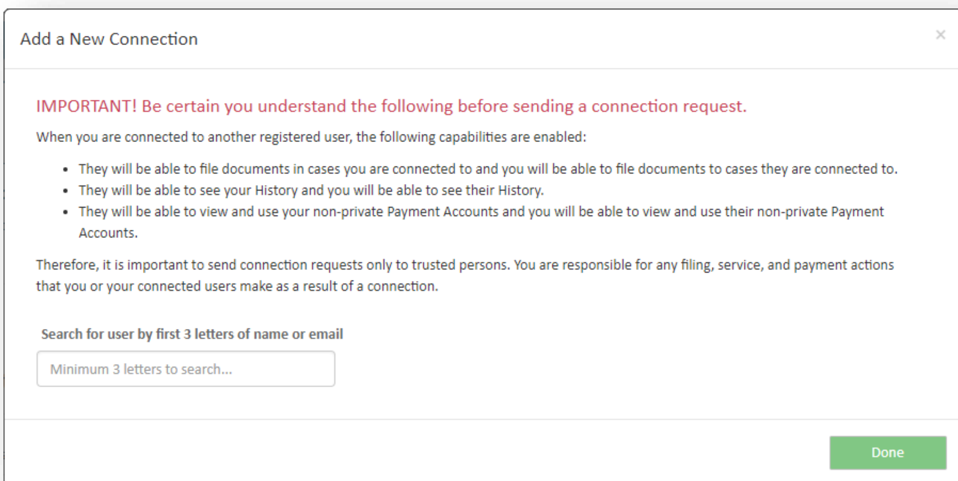
Filing for a Connection

If the person on whose behalf you want to file isn't in the **Filer** field list, you'll need to confirm they are a connection. If they're not, you must send them a connection request, and they must accept it before you can file on their behalf.

1. Click **View Connections** in the Help Finding a Filer dialog. You're re-directed to the Connections pane on the Settings page.
2. Check the Active Connections pane for the person you want to select as your filer.
3. If they're not an active connection, click **Add New Connection**.

   Some courts may allow only TrueFiling users whose user role is Attorney to send a connection request. If you're filing in such a court, and your user role is not Attorney, the **Add New Connection** button is not visible.

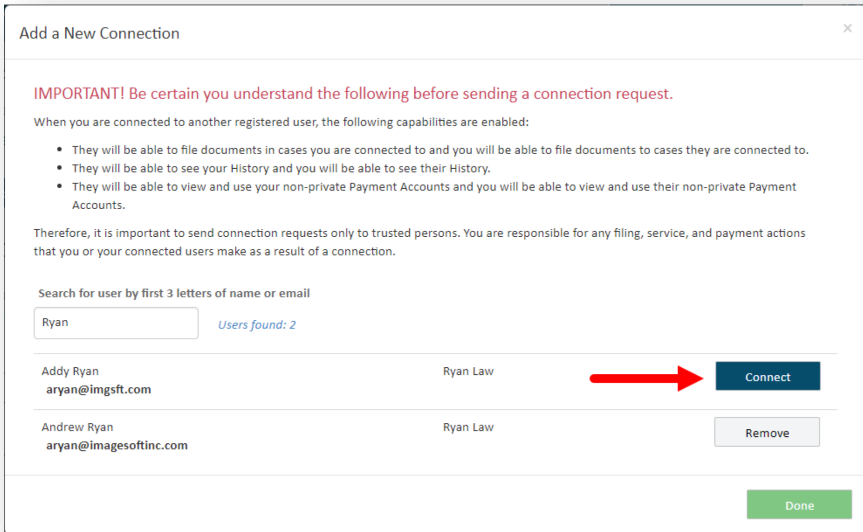
   This dialog will display. Read it carefully and be certain you understand how TrueFiling connections work. See TrueFiling Connections for more information.

   If you don't want to continue to add the connection, click **Done**.

4. If you want to continue, input the name or email address of the person you want to add as a connection. Matching entries are listed after three characters are input.

The entries listed will include TrueFiling users you're already connected to and those you can connect to. A message will display if no matching entries are found.

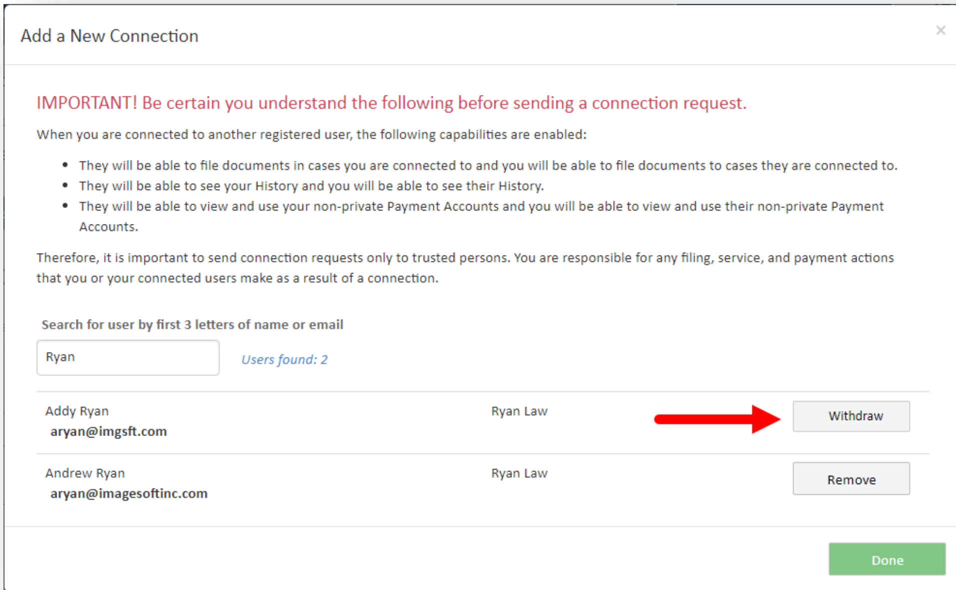


5. Locate the person you want to add as a connection.

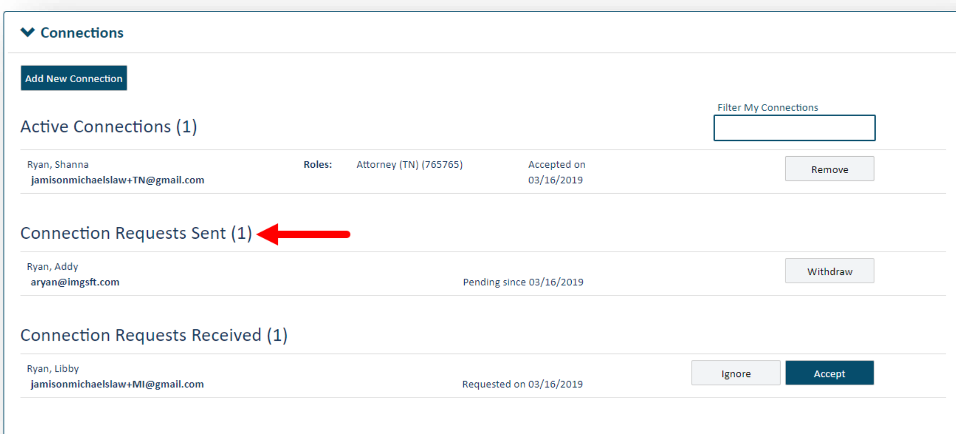
   If more than five results are returned, a scroll bar is placed on the right edge of the dialog. Scroll through the results to locate the person you want to add.

6. Click the **Connect** button beside the person to add. The connection request email will be sent. The potential connection will see a Connection Request notice when they log in to TrueFiling.

Note: If you clicked **Connect** in error, you can click the **Withdraw** button. The Connection Request notice won't display when the user logs in; however, the request email will still be sent to them.



7. Click **Done** when you're finished. Your potential connection is listed in the Connection Requests Sent section of the Connections pane; their status is **Pending**.



To become part of your connection network, they MUST log in to TrueFiling and accept your request. They won't be an active connection, and you can't file on their behalf, until they accept the request.

Once they accept, their name is available in the **Filer** field drop-down list on the File pane.

Filing for Yourself

If you want to file on your own behalf, you must have a specified user role. See Manage your User Role for details on how to select your role.

Once you specify a role and supply the required information, your name will be in the **Filer** field drop-down list.

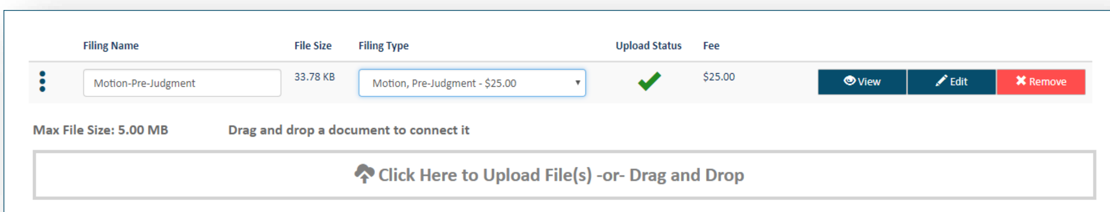
Upload your Filing Documents

You can upload documents with these file formats:

- Microsoft Word (.doc / .docx)
- Adobe PDF (.pdf)
- Plain text (.txt)
- Rich Text Format (.rtf)
- Scanned images (.tiff, .jpg, and .png)

Regardless of a document's original file format, upon upload, the document is converted to PDF.

1. In the Upload pane, click the **Upload File** box and select your document in the dialog displayed. You can also drag and drop the document from File Explorer into the box. You can select multiple documents and upload them together.



   A green checkmark in the **Upload Status** column indicates your document was successfully uploaded.

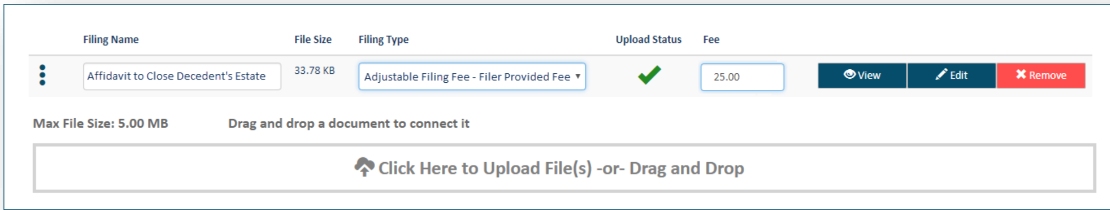
2. Select the **Filing Type** from the drop-down list. Based on the type selected, you may also need to specify a **Sub-filing Type**. If one is required, another field will display where you'll make your selection.

   The fee associated with the filing type will be listed in the **Fee** column. Click the fee amount to display a dialog that lists fee details.

   If the court permits, you can request that the fees associated with this case be waived. The court determines which fee waivers, if any, are available. See Request a Fee Waiver later in this guide for details.

MiFILE Only

MiFILE courts allow adjustable filing fees, which require the filer to input the filing fee. If such fees are enabled for the court you're filing in, one or more special filing types will be available in the **Filing Type** field drop-down list. To illustrate:

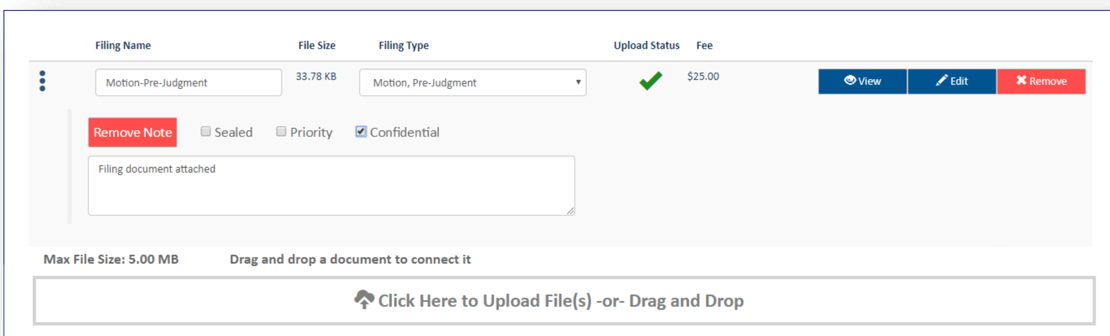


If you select one of these filing types, a text field is displayed in the **Fee** column.

1) Input a valid numeric fee amount; for example, **25.00**.

The fee will be listed in the Checkout dialog when you submit your filings. Any processing fees mandated by the court will be computed based on the amount you input.

3. If you want to assign an attribute to the uploaded filing or add a note that will be sent to the Clerk, click the **Edit** button.



4. If enabled by the court, you can specify one or more attributes; for example, Sealed, Priority, Confidential. **It is the filer's responsibility to ensure sealed or confidential information is served only to the appropriate parties**.

MiFILE Only

In MiFILE courts, any filing identified as Sealed or Confidential cannot be submitted to the court if the **Serve Document** option was specified in the File pane.

5. To add a note that will be delivered with the filing to the court, click **Add Note**.

The court determines if this option is available.

a. Input the note text. The court can configure the maximum number of characters allowed in this field. If this value is not configured, the note is limited to 200 characters.
b. Click **Remove Note** to delete the note.

6. Click **Edit** once again to retract the attributes and note pane.

   If allowed by the court, you can connect uploaded documents. See Connect Documents for details.

   If allowed by the court, you can merge uploaded documents into a single PDF file. See Merge Documents for details.

7. Continue to upload your filings.

If you want to review the filing document you uploaded, click the **View** button. The document will display in a separate window.

Documents with certain file extensions cannot be viewed in a separate window. Instead, the document will download to your computer where you can open, save, and print it.

You can re-order the filings before you submit them. See Reorder your Uploaded Filings for details.

To continue the filing process:

Select the service recipients
Save your filing so you can continue it later
Request a fee waiver
Submit your filing to the court

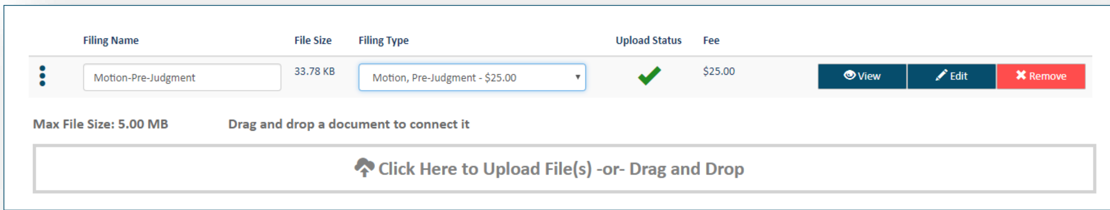
Some courts require the filer to use an online form to submit filings. See Download Form for details.

Some courts enable or require the filer to create a document to upload. See Create a Document for details.

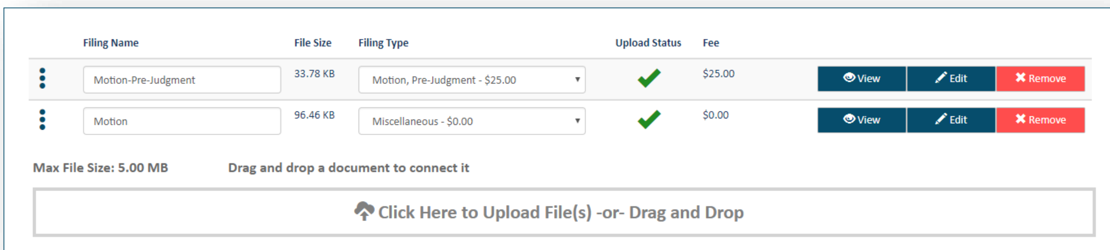
Connect Documents

A connected document is a separate filing associated with a filing. It functions as a "child" of the "parent" (primary) document. The court determines if connected documents are allowed.

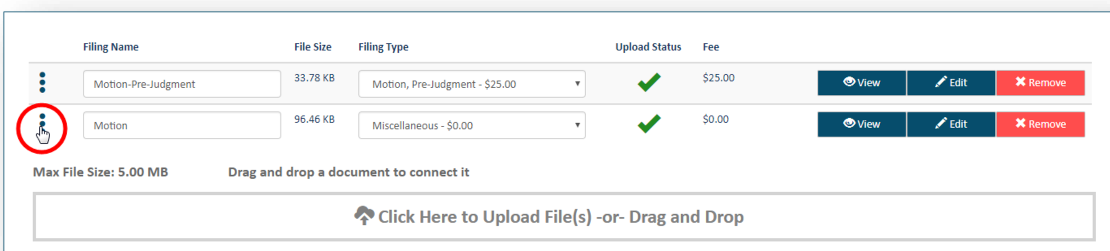
You'll upload a file and then connect it to the primary document. The filings are connected, yet still separate.



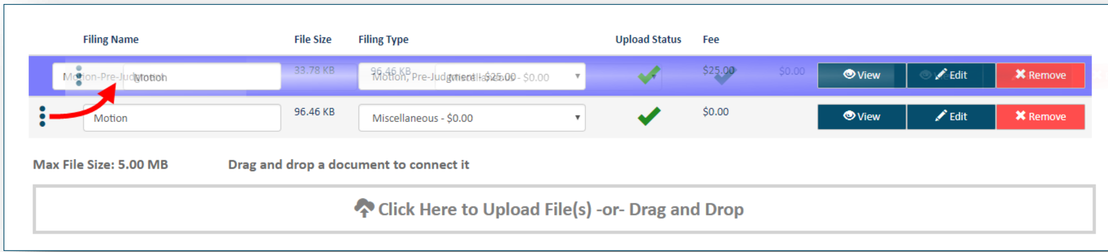
1. First, upload the primary document. See Upload your Filing Documents for details.



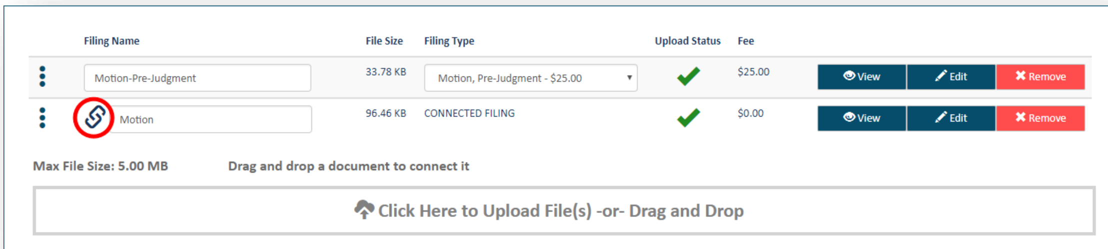
2. Next, upload the document to connect to the primary.
3. Select the **Filing Type**.



4. Select and hold the vertical dots beside the Filing Name of the document you want to connect to the primary document, as shown in the above image.



5. Drag the dots to the row that contains the primary document until the row is highlighted in purple.
6. Release the dots. The document is now connected to the primary document.

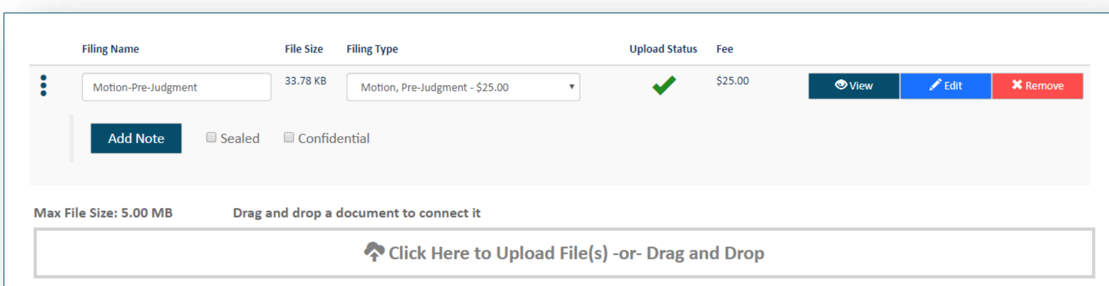


The Filing Type of the connected document may default to **CONNECTED FILING**. However, in some courts, you may be required to select the **Filing Type** of the connected document.

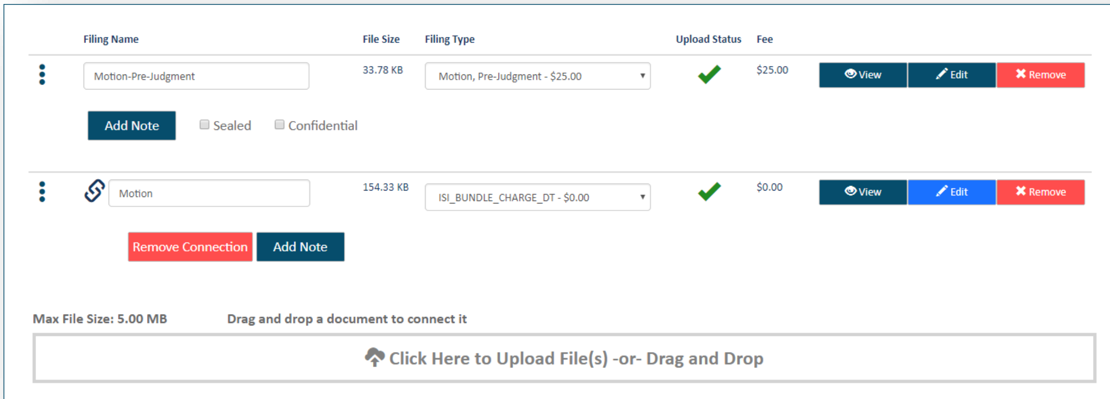
Repeat steps 2 – 6 as needed.

Confidential and Sealed Attributes in Connected Documents

The court can be configured to allow the Sealed and / or Confidential attributes to be applied to filing documents. If so enabled, when the Edit button is selected, the Sealed and / or Confidential checkboxes are visible:



If the court is also configured to allow connected documents, these checkboxes are visible only for the primary document. They are not available for any connected documents.

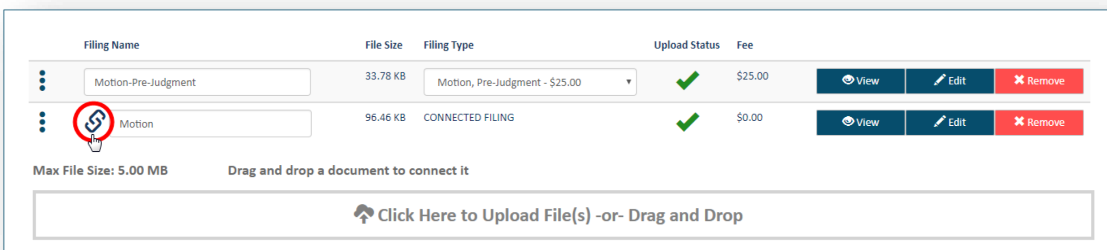


If no attributes are applied to the primary document, none will be applied to the connected document.

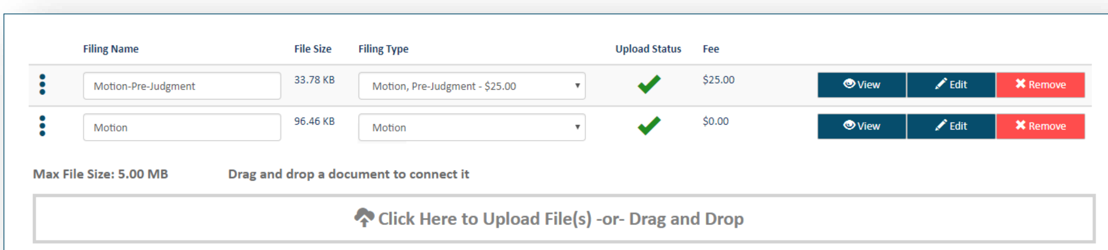
Similarly, if any attributes are applied to the primary document, they will also be applied to the connected document. Be aware that, in such instances, any restrictions the court configures regarding the service of confidential or sealed documents will be applied to both the primary and connected documents.

Separate Connected Documents

You can remove the connection between two documents.



1. Click the connection link icon. The connection is removed.



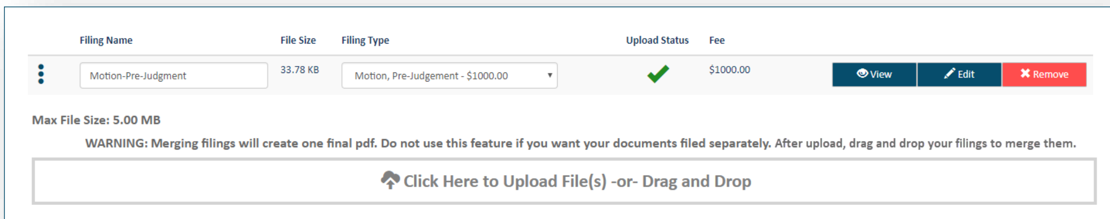
2. Select the appropriate **Filing Type** for the un-connected document if needed.

Merge Documents

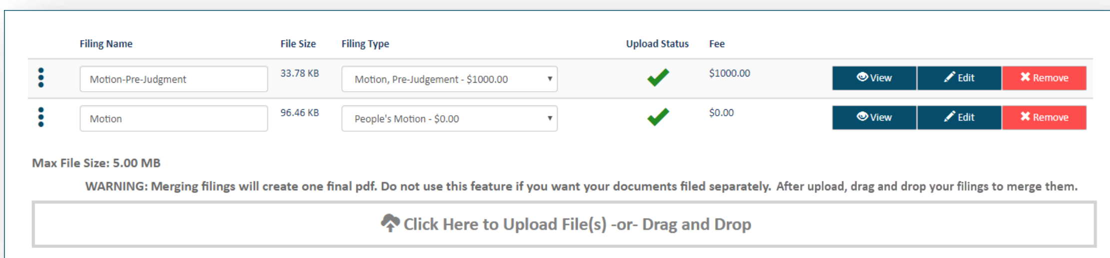
In merged documents, one or more "child" filings are appended to a "parent" filing. You'll upload a document and then merge it with the primary document. The result is one PDF file containing all the filings. The resulting file cannot exceed the maximum file size established by the court.

The court determines if merged documents are allowed.

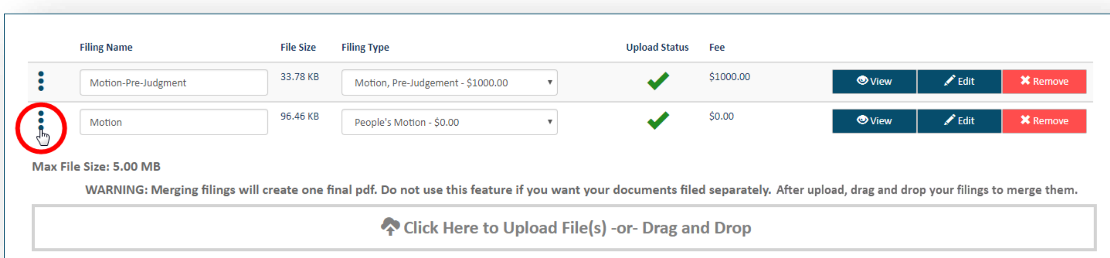
IMPORTANT: The order of your filings in the Upload pane will be the order in which they're merged into the single PDF file. You can re-order the filings before you merge them. See Reorder your Uploaded Filings later in this guide.



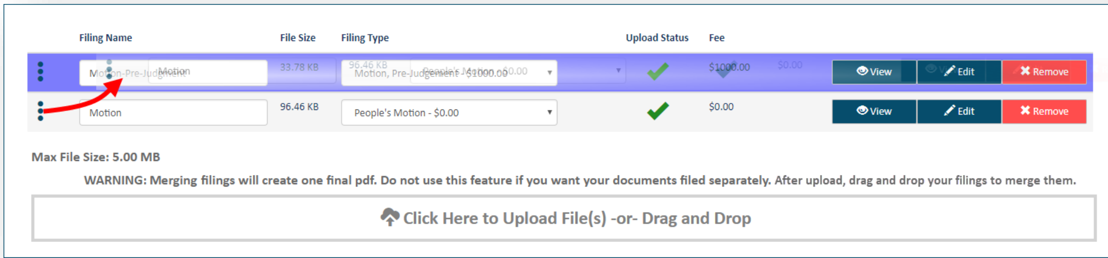
1. First, upload the primary document. See Upload your Filing Documents for details.



2. Next, upload the document to merge.
3. Select the **Filing Type**.

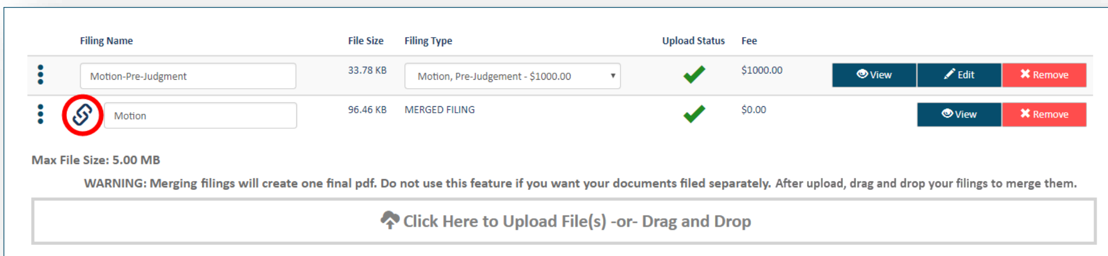


4. Select and hold the vertical dots beside the Filing Name of the document you want to merge with the primary document, as shown in the above image.



5. Drag the dots to the row that contains the primary document until the row is highlighted in purple.
6. Release the dots.

   The document is now merged with the primary document.



7. Repeat steps 2 - 6 as needed.

   Special notes:

   The Filing Type of the merged document defaults to **MERGED FILING**.

   Documents that are merged with a primary can't have a Note added. As a result, the **Edit** button is not available for documents that were merged.

See <u>View and Download Merged Documents</u> for details on how to download any document in a merged document that's been submitted to the court.

See <u>Separate Merged Documents</u> to learn how to release a merged document from the primary document.

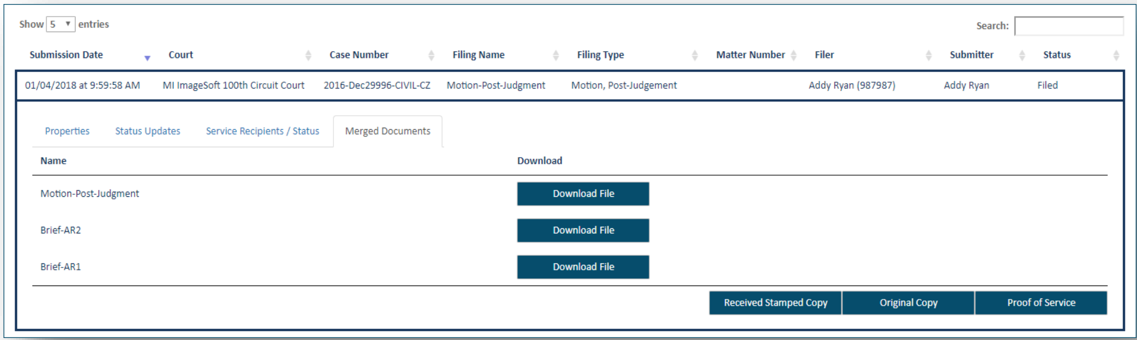
View and Download Merged Documents

After a merged document has been submitted to the court, you can view and download the documents that comprise the merged document via the History page.

1. Click **History** under Main Pages in the navigation pane.
2. Specify which filings to display:
   - **My History** - filings submitted to the court by you or by a connection on your behalf
   - **My Network's History** - filings submitted by you and your connections

3. Locate the merged filing and click the **Filing Name**.

   A pane with four tabs is displayed. (If the selected filing is not a merged document, only three tabs are present.)



4. Select the **Merged Documents** tab.

   All documents in the merged document are listed. The primary document is listed first.

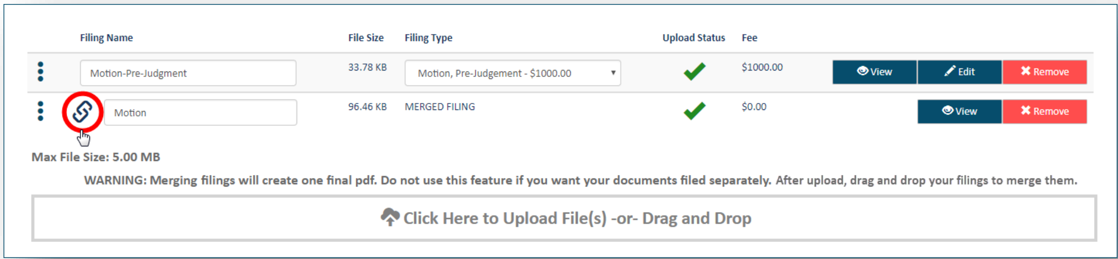
5. To download one of the documents, click the **Download File** button.

   In some browsers, the document will display in a separate window. You can save and / or print the document from within this window.

See Download Documents Related to your Filing for complete details on downloading documents through the History page.

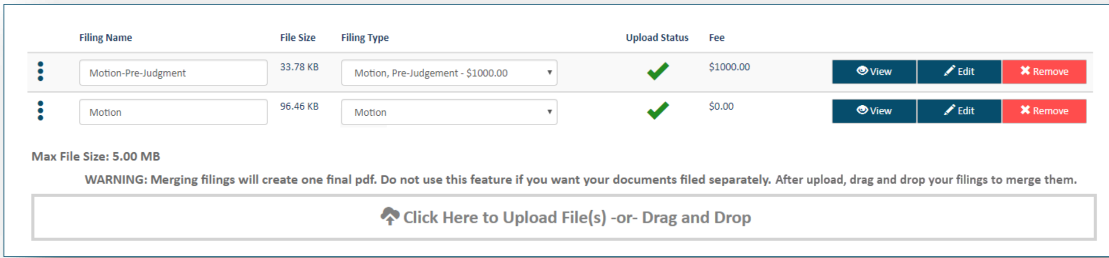
Separate Merged Documents

You can release a document that's merged to the primary.



1. Click the merged link icon.

The document is no longer merged with the primary.

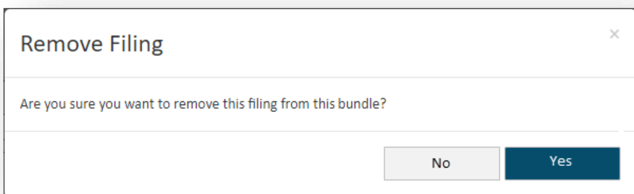


2. Select the appropriate **Filing Type** for the separated document.

Remove an Uploaded Filing

If you want to remove an uploaded filing before you submit it:

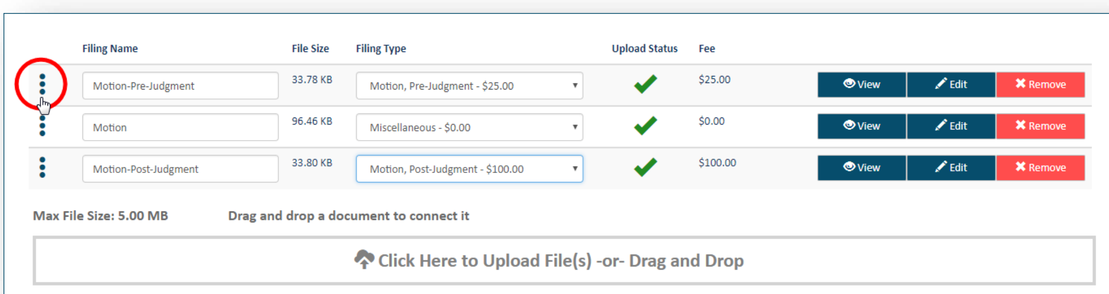
1. Locate the appropriate Filing Name in the Upload pane.
2. Click the **Remove** button.



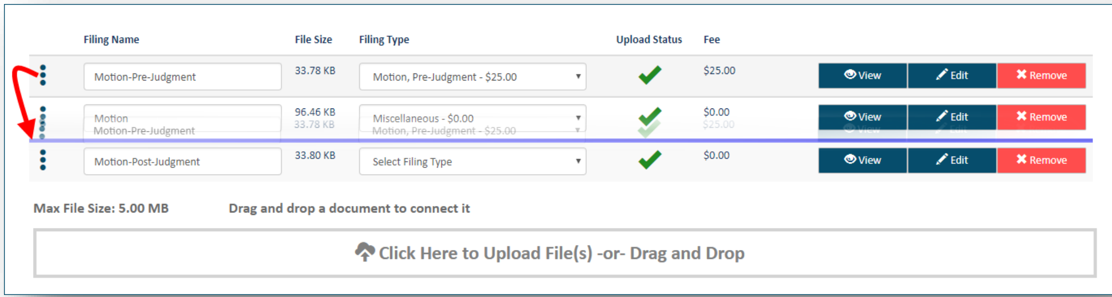
3. Click **Yes** to proceed; click **No** to leave the filing in the bundle.

Re-order your Uploaded Filings

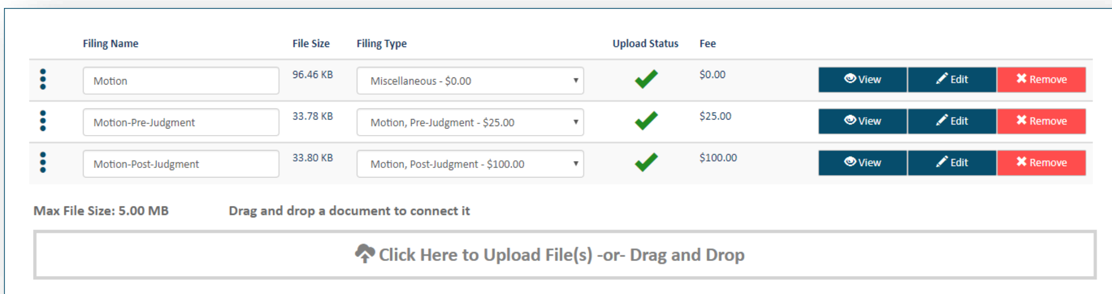
When you upload multiple filings, you can re-order them in the Upload pane.



1. Select the handle beside the filing to re-position.



2. Drag the filing until a purple line displays **above** the desired location.
3. Release the handle to re-position the filing.



Download a Form

Some courts require the filer to file using an online form. You'll download the form in TrueFiling, complete it, save it locally, and then upload it in TrueFiling.

To download a form:

1. On the Upload pane, select the **Download Form** button.
2. In the dialog displayed, select the arrow on the **Available Forms** field.
3. Select the appropriate form type from the list displayed.
4. Click **Download** to download the form to your computer.
5. Complete the form as required.
6. Save the completed form locally.
7. On the Upload pane, click the **Upload File** box and select the saved form in the dialog displayed. You can also drag and drop the document from File Explorer to the box.

   To view your uploaded document in a separate tab or window, click the **View** button.

8. Select the **Filing Type** from the drop-down list. Based on the type selected, you may also need to specify a **Sub-filing Type**. If one is required, another field will display where you'll make your selection.

   The fee associated with the filing type is listed in the **Fee** column.

   If the court permits, you can request that the fees associated with this case be waived. The court determines which fee waivers, if any, are available. See Request a Fee Waiver for details.

9. If you want to add a note to send to the Clerk or (if allowed by the court) assign an attribute to the filing, click the **Edit** button.
10. Select the checkbox beside one or more attributes - **Sealed**, **Priority**, **Confidential**. Assigning these attributes will NOT prevent TrueFiling from serving the document.

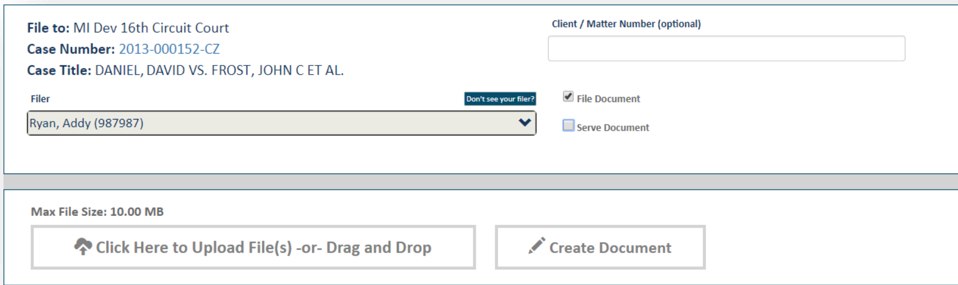
    It is the filer's responsibility to ensure sealed or confidential information is served only to the appropriate parties.

11. To add a note that will be delivered with the filing to the court, click **Add Note**.
12. Input the note text; the note is limited to 250 characters. (Click **Remove Note** to delete the note.)
13. Click **Edit** once again to retract the pane.

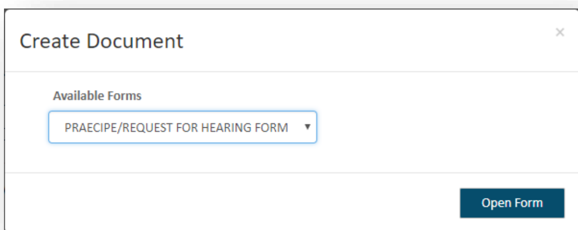
Create a Document

In some courts, filers can create a document from a form presented within TrueFiling and upload that document as a filing.

If the court is configured for this feature, the **Create Document** button is available in the Upload pane.

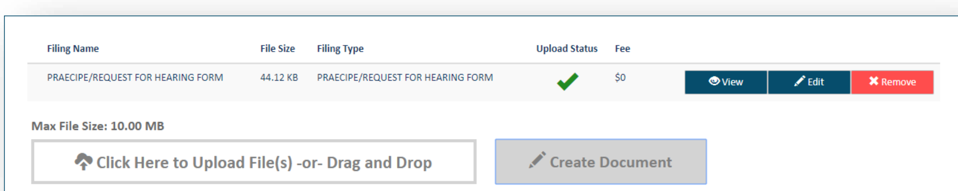


1. On the Upload pane, select the **Create Document** button.



2. In the dialog displayed, select the arrow on the **Available Forms** field. The court determines which forms are listed.
3. Select the appropriate form.
4. Click **Open Form**. The form is displayed.
5. Enter the form information as required.
6. At the end of the form, a **Complete**, **Sign Document**, **Finish**, or **Submit** button will be visible. The court determines the button label.
7. Click the button to complete.

   The Upload pane is re-displayed, and the form is listed.



The Filing Type defaults based on the form selected.

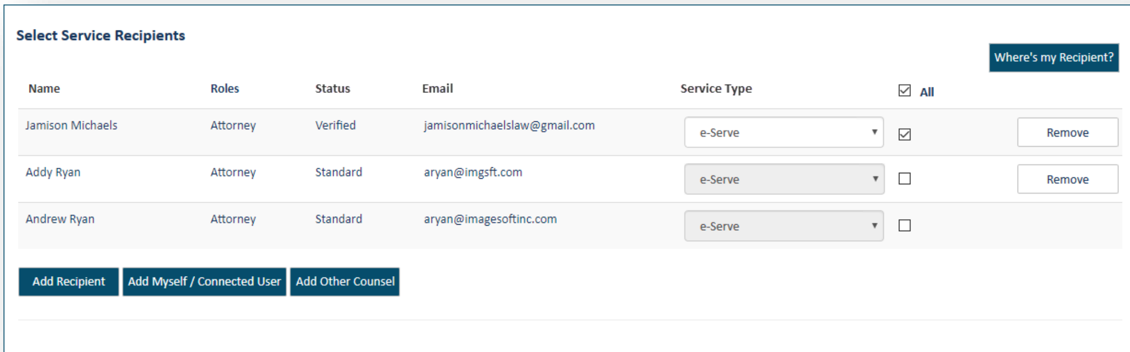
8. If permitted or required by the court, you can upload additional filings. See Upload your Filing Documents for details.
9. If you want to add a note to send to the Clerk, click the **Edit** button. A pane will expand where you can input the note text.
10. Input the note text. The court can configure the maximum number of characters allowed in this field. If this value is not configured, the note is limited to 200 characters. (Click **Remove Note** to delete the note.)
11. Click **Edit** once again to retract the Note pane.

If you want to review your form before you submit it, click the **View** button to display your completed form.
If there is an error in the form, be aware the **Edit** button will not allow you to edit it. You'll have to click the **Remove** button to remove it from the Upload pane and then re-create the document by clicking the **Create Document** button once again.

Select the Service Recipients

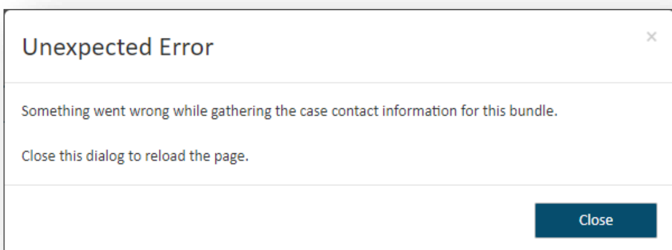
If you want to serve your filing documents, you must select the **Serve Document** checkbox in the File pane.

When this option is selected, the Select Service Recipients pane is displayed.



Existing case contacts and the selected filer are listed.

If the case contacts fail to load, this dialog is displayed.



Click **Close** to reload the page. The case contacts will populate the Select Service Recipients section.

The court dictates which service methods are allowed. By default, eServe is specified as the **Service Type**. If allowed by the court, you can choose a different type; however, some courts may allow only eService.

Be aware - if you select **Mail Service** or **Personal Service**, <u>you are responsible</u> for serving the document. TrueFiling <u>will not</u> perform the service.

You can add an ad hoc recipient for this filing submission only. This option may not be enabled for all courts. If it's not enabled, the **Add Recipient** button won't be visible.

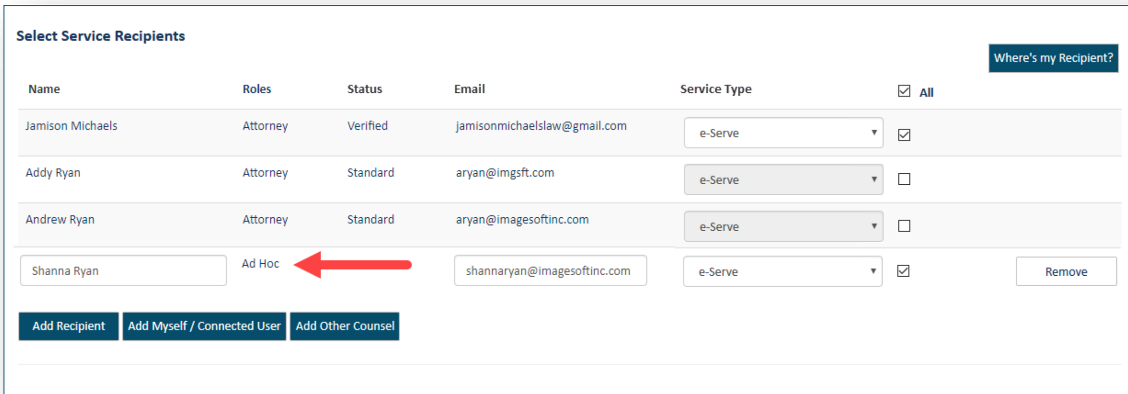
You can also add yourself / a connection or other counsel (if enabled by the court) as a recipient.

Add a Service Recipient for a Filing

If the court allows, you can add a recipient who isn't a TrueFiling user for this filing bundle ONLY. Adding this person as a recipient won't add them as a case contact for the case.

If not allowed, the **Add Recipient** button will not be visible.

1. In the Select Service Recipients section, click the **Add Recipient** button. A row of blank fields is displayed.



2. Input the recipient's name and email address. Their Role will default to **Ad hoc**. The checkbox is selected by default.
3. Select the **Service Type**.

   If you select **eServe**, this person will be served when the filing is submitted to the court.

   If you select **Mail Service** or **Personal Service**, input their mailing address instead of their email address. This recipient will be listed on the Proof of Service TrueFiling generates. However, it is YOUR responsibility to serve the documents.

   The court can be configured to allow a **Courtesy Copy** service type, which allows an ad hoc recipient to receive a copy of the email that's sent to eServed recipients. Such courts can, however, be configured to prevent courtesy copy recipients from being included in the TrueFiling generated Proof of Service.

   If needed, click **Remove** to remove them as a recipient.

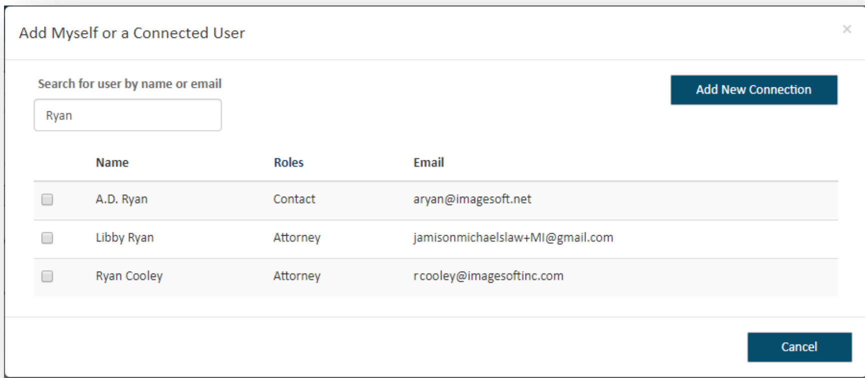
You can also add yourself or a connection or other counsel (if allowed by the court) as a recipient.

Add Yourself or a Connection as a Service Recipient

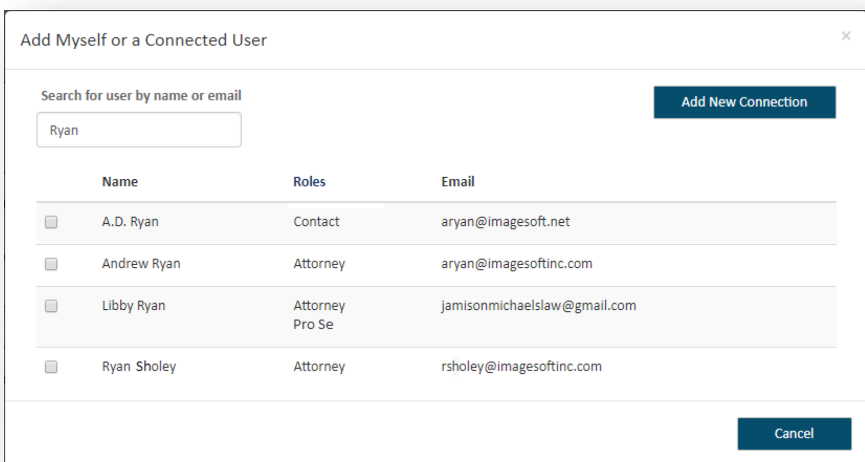
You can add yourself or a connection as a service recipient. This recipient will also be added as a contact for the case.

1. In the Select Service Recipients pane, click **Add Myself / Connected User**.

   A dialog listing your connections that aren't recipients for this filing is displayed. Only people that have accepted your connection request are shown.



If you or a connection has more than one TrueFiling user role, each role will be listed. Be aware, when you add a service recipient, you're adding the person, not a specific role.

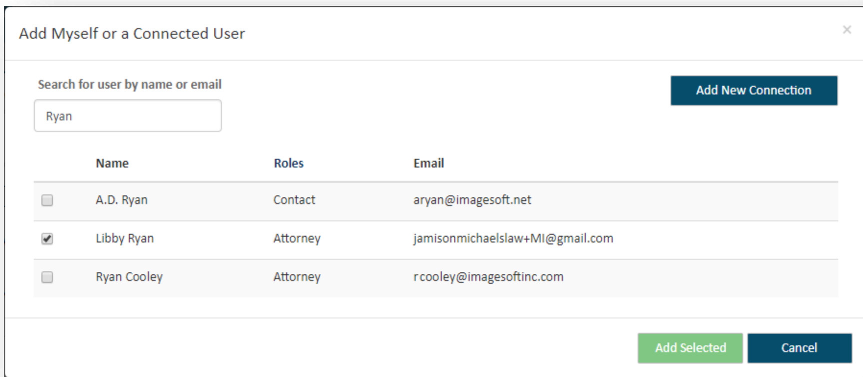


If the recipient you add has multiple roles, each role will be listed for that recipient in the Select Service Recipients section.

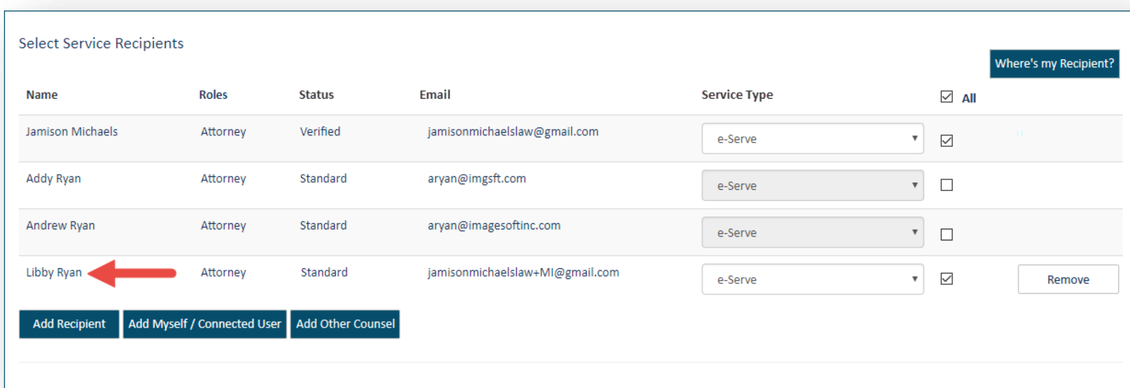
2. To filter the connections listed, input the name or email address of the connection you're looking for in the **Search** field. Matching entries are listed after three characters are input.

If you need to add a new connection, select the **Add New Connection** button. View details on this process at Add a New Connection.

Some courts may allow only TrueFiling users whose user role is Attorney to send a connection request. If you're filing in such a court, and your user role is not Attorney, the **Add New Connection** button is not visible.



3. Locate the connection to add as a recipient.
4. Select the checkbox beside their name.
5. Click **Add Selected**. The recipient is added.



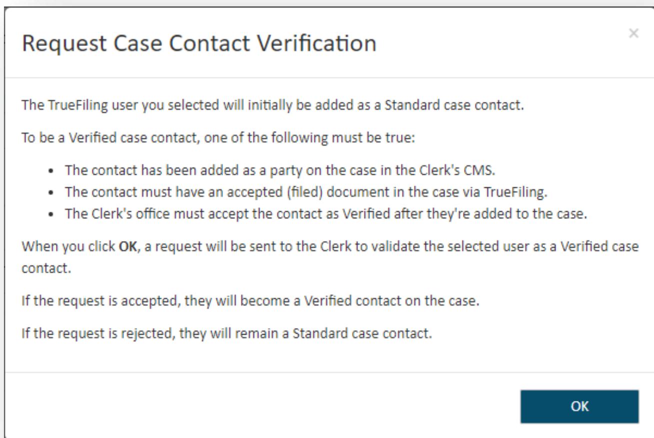
6. Select the **Service Type**.

Click the **Remove** button to remove the recipient, if needed. This option is available only before you submit your filing bundle to the court.

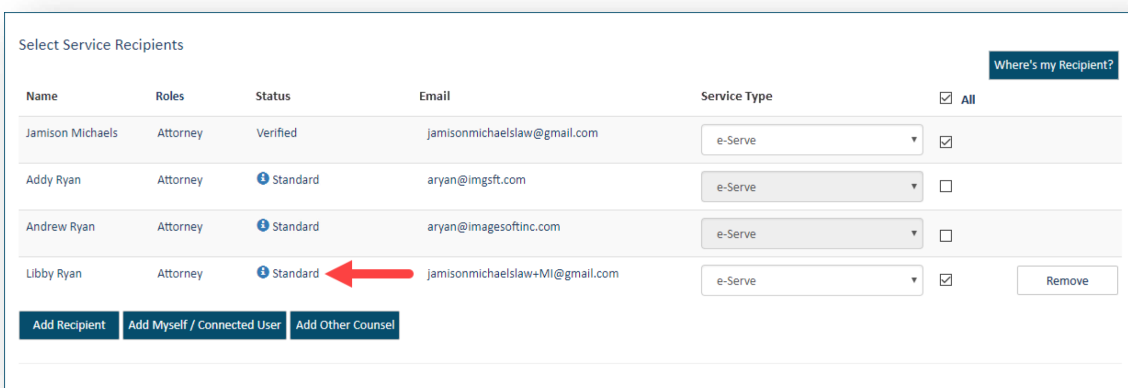
Verified Contacts

Courts configured to use Verified and Standard case contacts can be further configured such that, when a user is added as a case contact or a service recipient, and the user's email address is in the same domain as an existing Verified case contact, that user will be added as a Verified case contact. The court can subsequently identify domains (such as gmail.com, yahoo.com) that will be excluded from this configuration.

Also, if a court is configured to use Verified and Standard contacts AND is also configured to submit a verification request to the Clerk when a case contact or service recipient is initially added as a Standard contact, this dialog is displayed when you select **Add Selected**:



When you click **OK**, a request is sent to the Clerk's office to verify the contact. The dialog will close, and the recipient is added to the case as a Standard contact.



If the Clerk accepts the verification request, the recipient will be classified as a Verified contact. Otherwise, the recipient will remain a Standard contact.

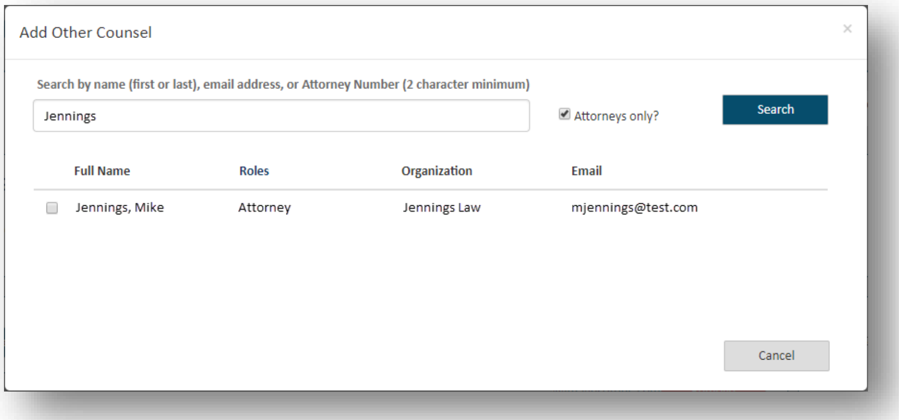
See What's a Case Contact >> Verified and Standard Case Contacts earlier in this guide for more information on Verified contacts.

Add Other Counsel as a Service Recipient

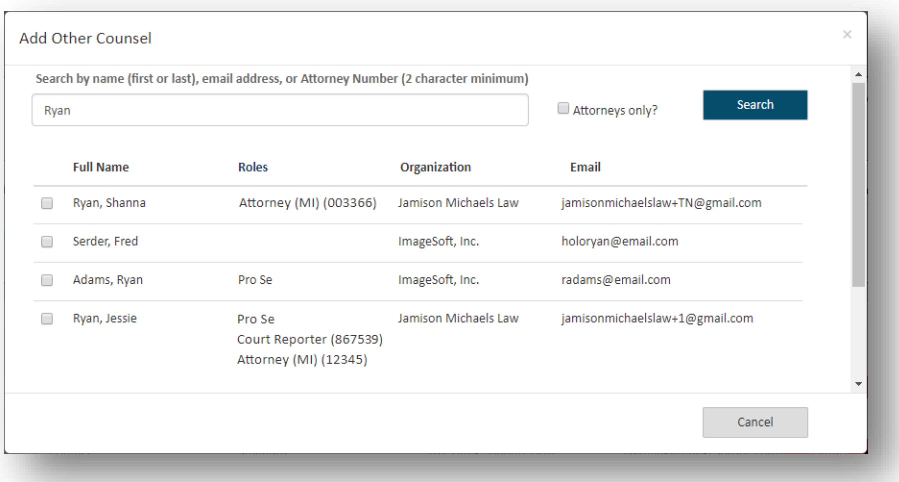
If allowed by the court, you can add other counsel as a service recipient. They will also be added as a contact for the case.

If not allowed, the **Add Other Counsel** button will not be visible.

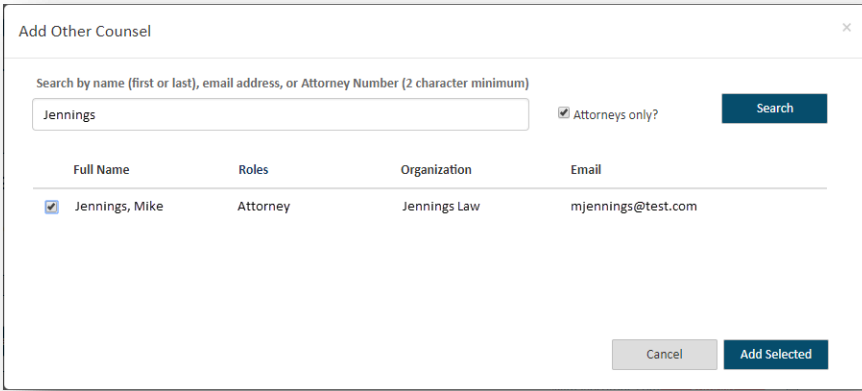
1. In the Select Service Recipients pane, click **Add Other Counsel**.



If counsel has more than one TrueFiling user role, each role will be listed. Also, if they are a TrueFiling attorney in multiple states, each instance is listed. Be aware, when you add a service recipient, you're adding the person, not a specific role.



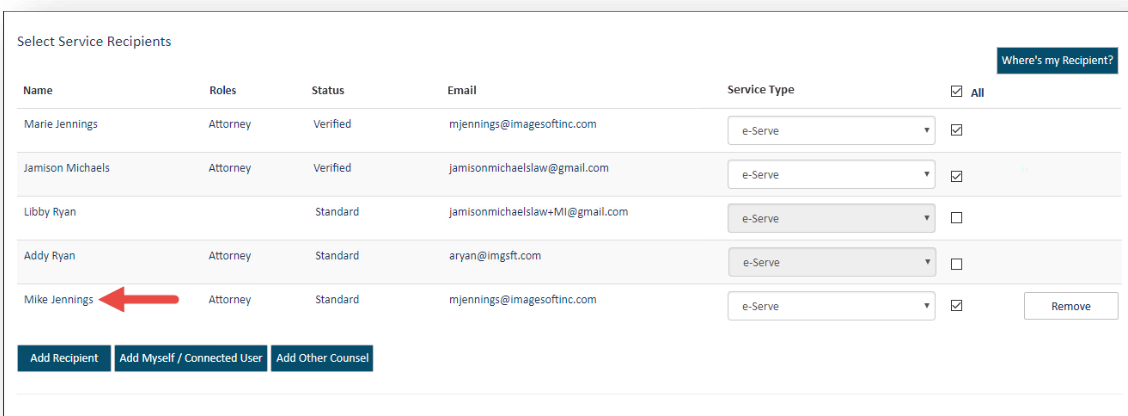
If the recipient you add has multiple roles or is registered for multiple states, each instance will be listed for that recipient in the Service Recipients section.



2. Input their **Name** (first or last), **email address**, or **Attorney Number**. A minimum of two characters is required.

   By default, any person registered in TrueFiling (attorney, court reporter, or pro se filer) will be included in the search results. If you want to search only for registered TrueFiling attorneys, select the checkbox beside **Attorneys Only**.

3. Click **Search**.
4. Locate the counsel to add and select the checkbox beside their name.
5. Click **Add Selected**. The recipient is added.

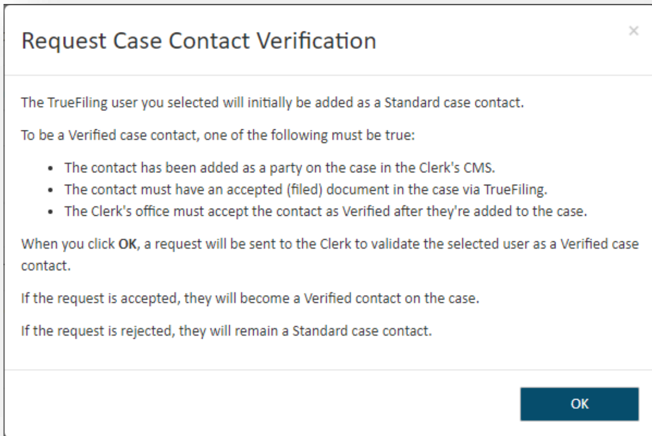


6. Select the **Service Type**.

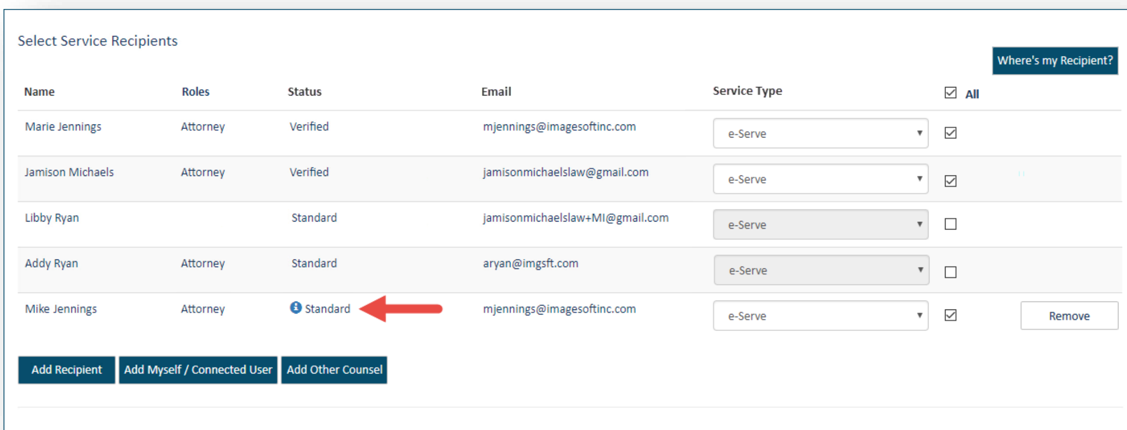
   Click the **Remove** button to remove the recipient, if needed. This option is available only before you submit your filing bundle to the court.

Verified Contacts

If the court is configured to use Verified and Standard contacts AND is also configured to submit a verification request to the Clerk when a case contact or service recipient is initially added as a Standard contact, this dialog is displayed when you select **Add Selected**:



When you click **OK**, a request is sent to the Clerk's office to verify the contact. The dialog will close, and the recipient is added to the case as a Standard contact:



If the Clerk accepts the verification request, the recipient will be classified as a Verified contact. Otherwise, the recipient will remain a Standard contact.

Note: If the court is configured such that a Standard contact that isn't connected to you will not be visible, once you refresh this page, or leave it and return, the added recipient will no longer be listed. This is because other counsel is added as a Standard contact, and you will not be connected to other counsel. As a result, the added counsel recipient will not be listed.

See What's a Case Contact >> Verified and Standard Case Contacts earlier in this guide for more information on Verified contacts.

To continue the filing process:

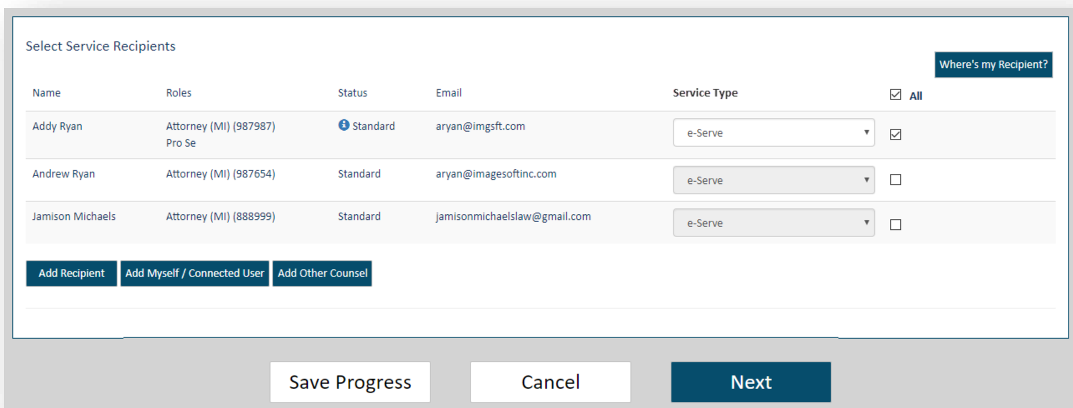
Save your filing bundle

Submit your filing to the Court

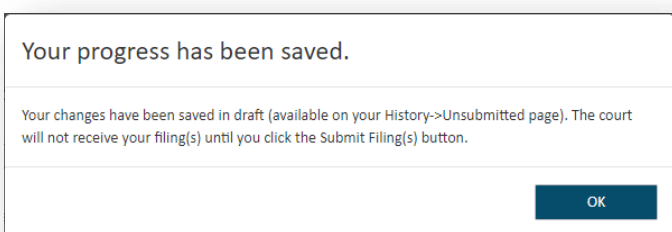
Save your Filing Bundle

If you don't want to submit your filing bundle at this time, you can save it and return to finish it later.

1. On the Upload pane, scroll to the bottom of the page.



2. Click the **Save Progress** button.



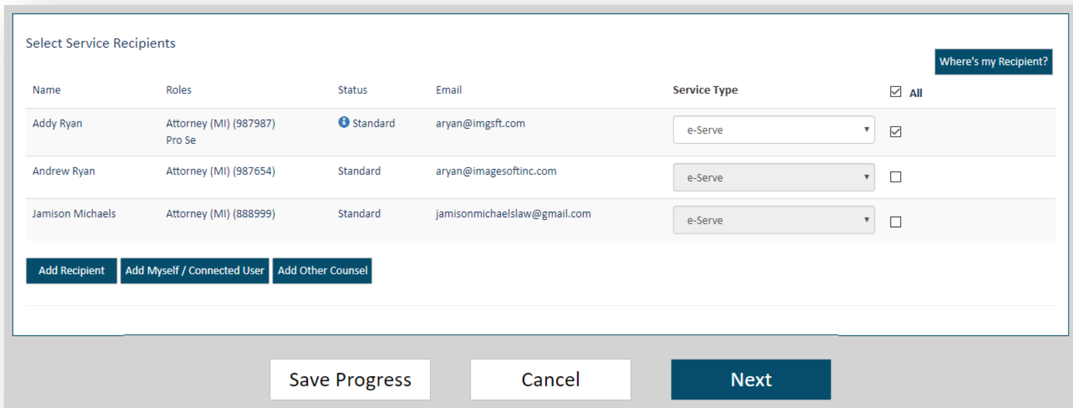
3. Click **OK** to close the dialog.

See Access a Saved Filing for details on completing your filing. When your filing is complete, you can submit it to the court. See Submit your Filings and Check Out later in this guide.

Leave the Upload Pane

You can also leave the Upload pane without saving or submitting your filing.

1. On the Upload pane, scroll to the bottom of the page.



1. Click **Cancel**.

If you click **Cancel** on a bundle you accessed through the Unsubmitted tab on the History page, your bundle will no longer be available. If you want to be able to access your saved bundle again, click **Save Progress**.

A confirmation dialog is displayed.

2. Select **Stay** to continue to work on the filing; select **Leave** to confirm the cancellation.

Access a Saved Filing

When you're uploading documents to a case, you can save your progress and not submit your filing bundle to the court. Within TrueFiling, the saved bundle's status is Unsubmitted.

To access the saved filing when you're ready to finish and submit it:

1. Select **History** under Main Pages in the navigation pane.
2. Select the **Unsubmitted** tab.
3. Locate and select the appropriate entry in the **Bundle Information** column.

TrueFiling will validate that the bundle the selected filing is in hasn't been submitted to the court. If it has been submitted, a dialog is displayed stating that fact. Click **OK**. The filings associated with the bundle will be removed from the Unsubmitted tab.

If the filing's bundle hasn't been submitted, a confirmation dialog is displayed. Click **OK**. The Upload pane will launch, listing all the filings that were uploaded before the save.

You can upload more filings or add service recipients.

Once the filing is completed, you can submit it to the court.

IMPORTANT: If you click **Cancel** instead of Save Progress or Next, your bundle will no longer be available on the History page. If you want to be able to access your saved bundle again, click **Save Progress**.

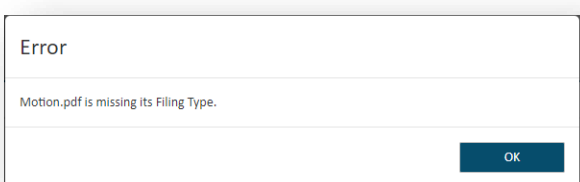
Submit your Filings and Check Out

Once your filing documents are uploaded, and you've selected any required service recipients, you can submit your filing bundle to the court.

Filing and Bundle Validation

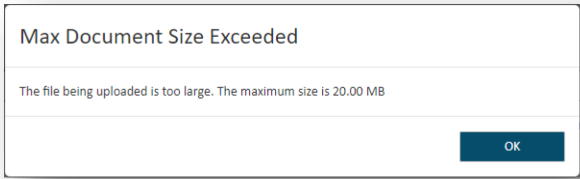
As you move through the submission process, TrueFiling performs various validation checks on your uploaded and submitted filings. Some examples include:

If you didn't select a Filing Type for an uploaded filing, this validation error dialog is displayed after you click **Next** on the Upload pane.



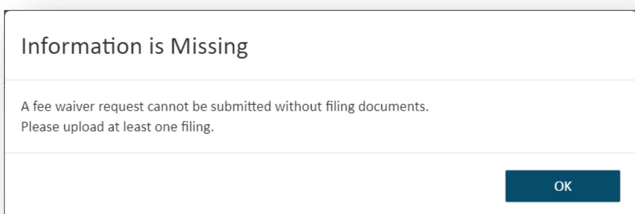
a. Click **OK** to close the dialog.
b. Return to the Upload pane and select a Filing Type.

If an uploaded document exceeds the maximum file size set by the court, this dialog is displayed after you click **Next** on the Upload pane.



a. Click **OK** to close the dialog.
b. Remove the filing document from the Upload pane.
c. Restructure the document into smaller documents that do not individually exceed the file size maximum.
d. Upload the documents.
e. Click **Next** to begin the submission process.

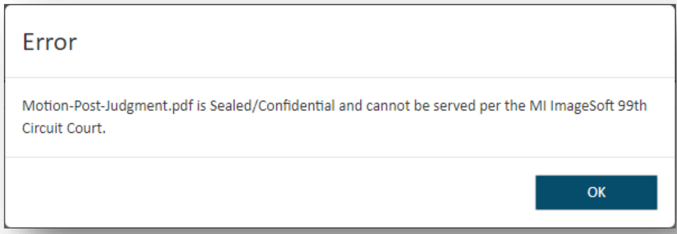
If you have requested a fee waiver, validation is performed to ensure your bundle contains at least one filing document. This dialog is displayed after you click **Next** on the Upload pane if there isn't an uploaded filing associated with the fee waiver request.



a. Click **OK** to close the dialog. You're returned to the Upload pane.
b. Upload the filing to submit (see Uploading your Filing Documents for details).
c. Click **Next** to begin the submission process.

A court can be configured to not allow filings with the Sealed or Confidential attribute to be served. If you applied the Sealed or Confidential attribute to any filing in the bundle, and you chose to serve your filing by selecting the **Serve Document** option on the File pane, your submission will fail.

This message will display after you click **Next** on the Upload pane.

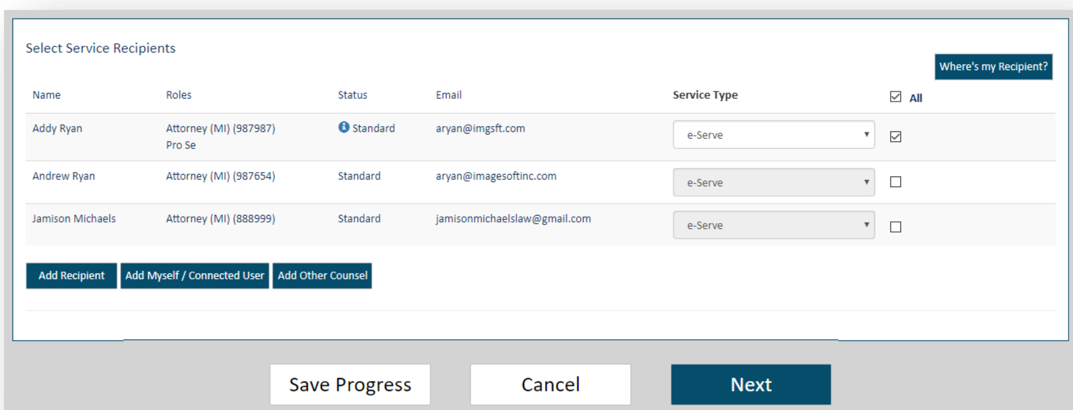


In courts so configured, sealed and confidential documents cannot be served; however, they can be filed to the court.

a. Click **OK** to close the dialog.
b. Return to the File pane and uncheck the **Serve Document** option.
c. Click **Next** to begin the submission process.

Submit your Filings

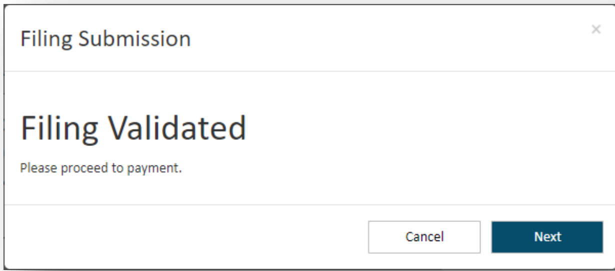
1. On the Upload pane, scroll to the bottom of the page.



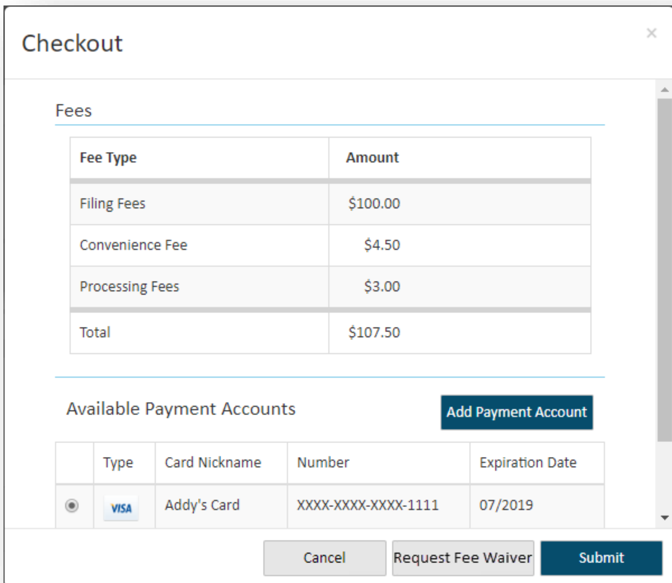
2. Click **Next**.

Your submission will be validated. See Filing and Bundle Validation earlier in this section.

If no errors are present, this dialog confirms your submission was validated.



3. Click **Next**. The Checkout dialog is displayed.



See What Fees are Charged? earlier in this guide for details on the fees that may be applied to your filings.

4. In the Checkout pane, confirm the fees listed are correct.

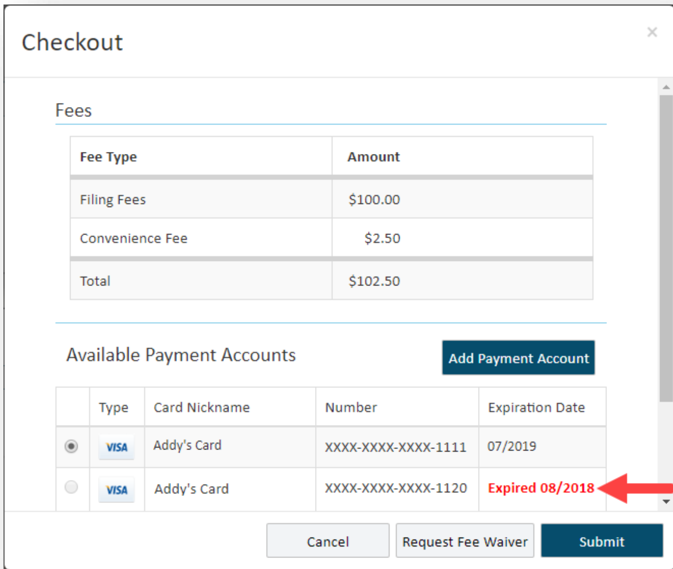
   You can request that the fees associated with your case be waived. The court you're filing in must permit fee waivers. The court determines which waiver options are available. See Request a Fee Waiver later in this section to learn how to request a fee waiver.

5. Select the appropriate **Payment Account**. Depending on court configuration, a payment account can be a credit card, escrow account, or inter agency transfer account. Escrow and inter agency transfer accounts must be authorized by the court. Refer to the Glossary later in this guide for more information on these account types.

   You don't have to select a payment account if the Total is $0.

If no payment accounts are listed, click the **Add Payment Account** button. See Add a New Payment Account for details on how to add an account.

Expired payment accounts are identified as such on the Checkout dialog and cannot be selected for payment.



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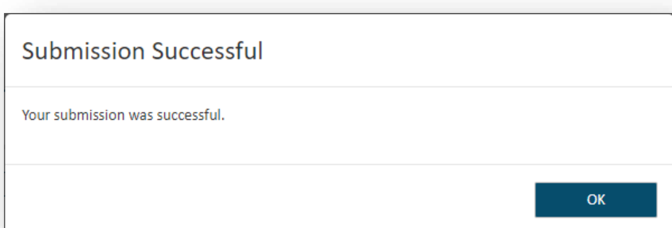
6. Click **Submit** to submit your filings to the court.

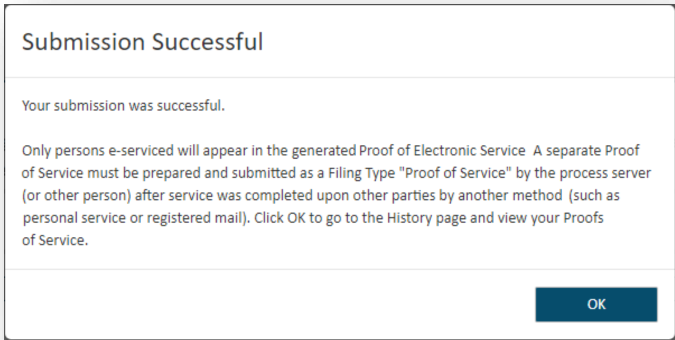
   A confirmation dialog is displayed once all validations are successful, and your filings are successfully submitted.



7. Click **OK**.

   On the History page, your submitted filing will be listed on the My History tab, even if you submitted the filing on a connection's behalf.

If you selected to serve your filing, the court may be configured to display this message after submission.



Click **OK** to close the dialog. You'll be re-directed to the History page. There, you can locate your filing on the My History tab and view / download your Proof of Service.

Once your filing is received by the court, the Clerk will review it and either accept or reject it. If it's accepted, the Clerk will file it, and it will become part of the official case record.

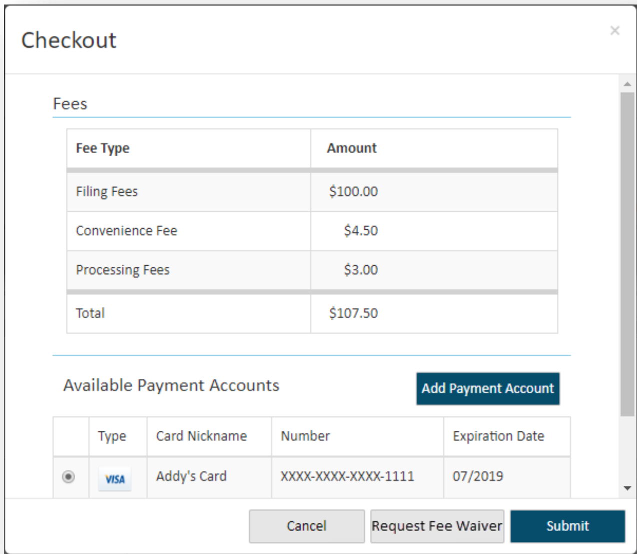
You can then download a Filed stamped copy of the filing for your records. See Download the Filed Stamped Copy later in this guide.

If it's rejected, you'll be notified via text message or email if your notification settings are appropriately set. See Notification Settings earlier in this guide for details.

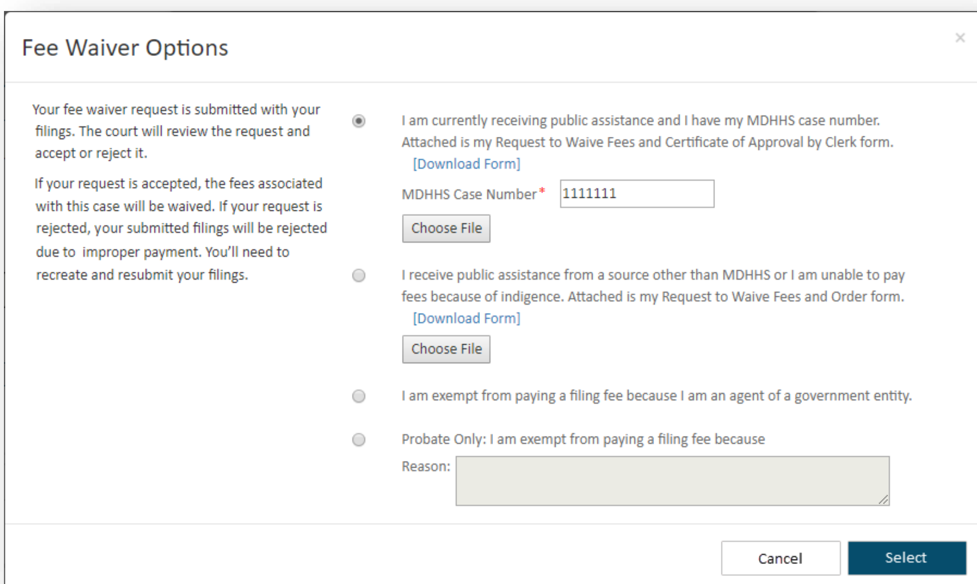
Request a Fee Waiver

The court may allow filers to request that the fees for their submitted filings be waived. **The court determines which fee waivers, if any, are available**.

To submit a waiver request:

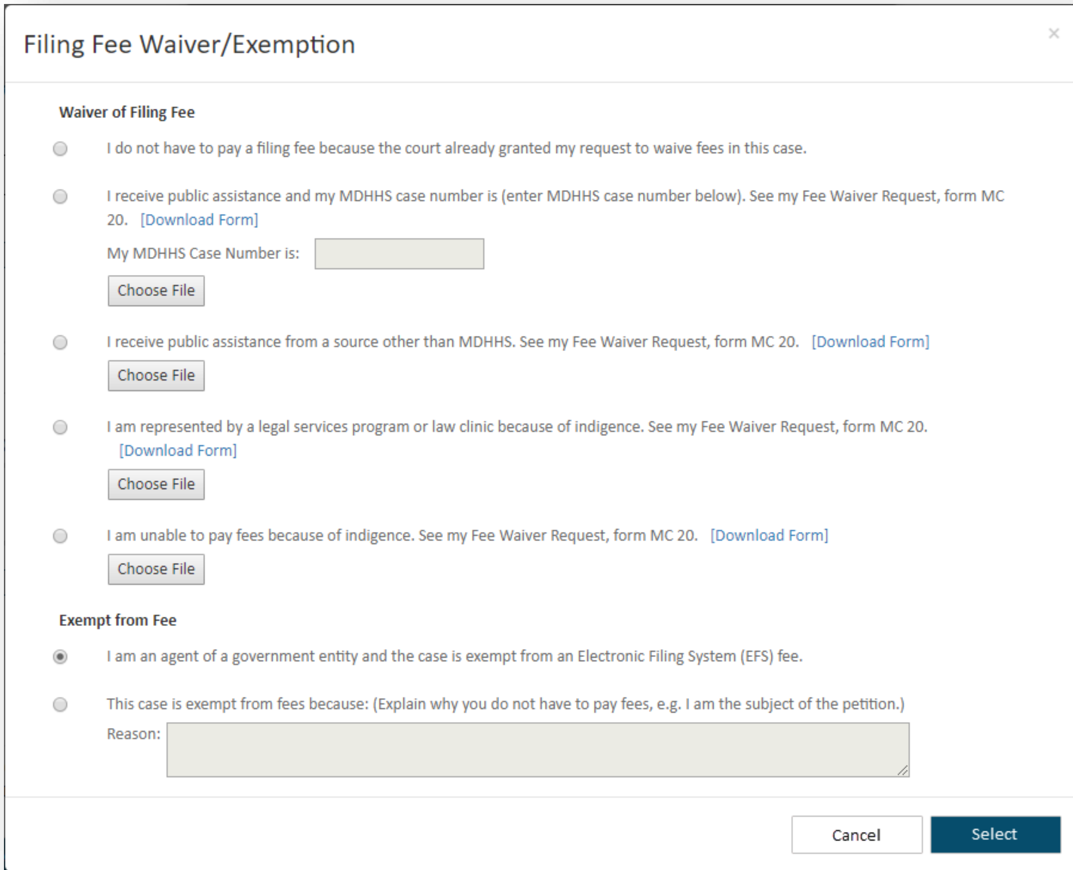


1. On the Checkout dialog, click **Request Fee Waiver**. The Fee Waiver Options dialog is displayed.



If configured by the court, this dialog can include a message pane that displays information the court wants to convey to the filer.

If a court imposes an EFS (Electronic Filing Service) fee, this dialog may be configured so the filer can request an exemption from that fee. For example:



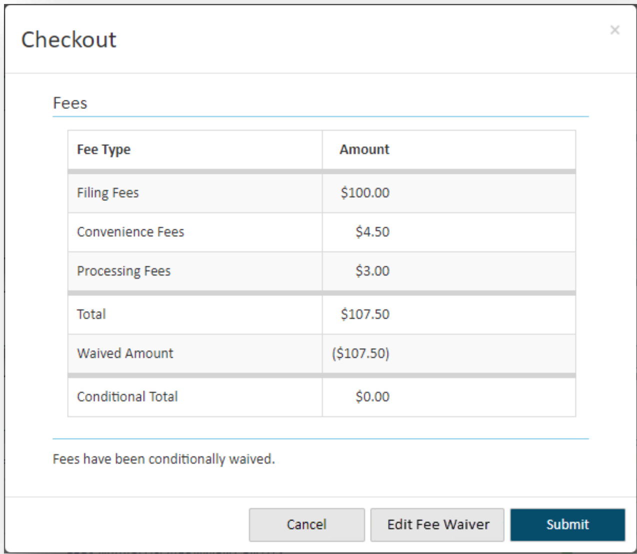
2. Select the appropriate Fee Waiver type. See What's a Fee Waiver? earlier in this guide for information on the available waiver types.
3. If the option you select requires you to upload a document, click **Choose File** (or **Browse**) and select the file in the dialog displayed. The file name will be listed after it's selected.

Some courts may allow you to download a court-provided form through TrueFiling and upload the completed form with your fee waiver request. See Submit a Fee Waiver Form in the next section for details.

Some waiver options require you to input information, such as a case number or the reason for your waiver request. Input the required information in the field provided. The maximum number of characters allowed is 250.

4. Click **Select** on the Fee Waiver Options dialog.

The Checkout dialog is displayed, and your fees are zeroed out as a Conditional Total.



5. Click **Submit**.

Your request is submitted with your filing bundle. The court will review the request and accept or reject it.

If it's rejected, your submitted filings will be rejected due to improper payment. You'll need to recreate and re-upload your filings.

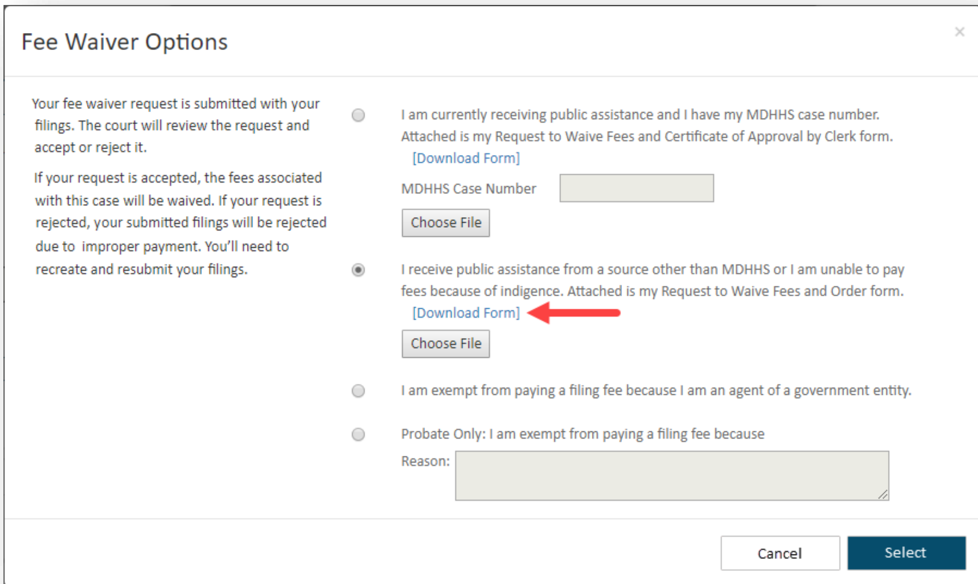
See also:

Submit a Fee Waiver Form for details on downloading a court-provided form and submitting the completed form to the court.
Change your Waiver Type for details on changing the fee waiver type you selected.
Remove your Waiver Request for details on removing the request.

Submit a Fee Waiver Form

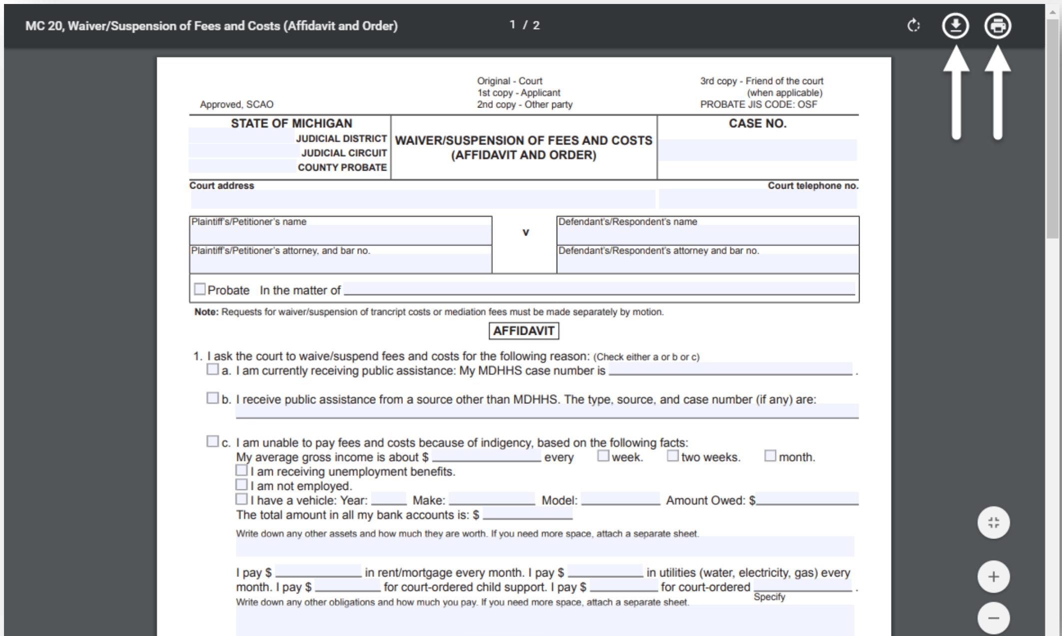
In some courts, you must download a court-provided fee waiver form from within TrueFiling. You'll complete the form and store it on your computer. You may also print the form, complete and scan it, and then store it locally.

Upload the completed form through TrueFiling and submit it to the court. To illustrate:



1. Select the appropriate option for your circumstance.
2. Click the **Download Form** link.

The form will launch in a separate browser window.


MC 20, Waiver/Suspension of Fees and Costs (Affidavit and Order) 1 / 2

Approved, SCAO
Original - Court
1st copy - Applicant
2nd copy - Other party
3rd copy - Friend of the court
(when applicable)
PROBATE JIS CODE: OSF

STATE OF MICHIGAN
JUDICIAL DISTRICT
JUDICIAL CIRCUIT
COUNTY PROBATE

WAIVER/SUSPENSION OF FEES AND COSTS
(AFFIDAVIT AND ORDER)

CASE NO.

Court address
Court telephone no.

Plaintiff's/Petitioner's name
Plaintiff's/Petitioner's attorney, and bar no.
v
Defendant's/Respondent's name
Defendant's/Respondent's attorney and bar no.

☐ Probate In the matter of

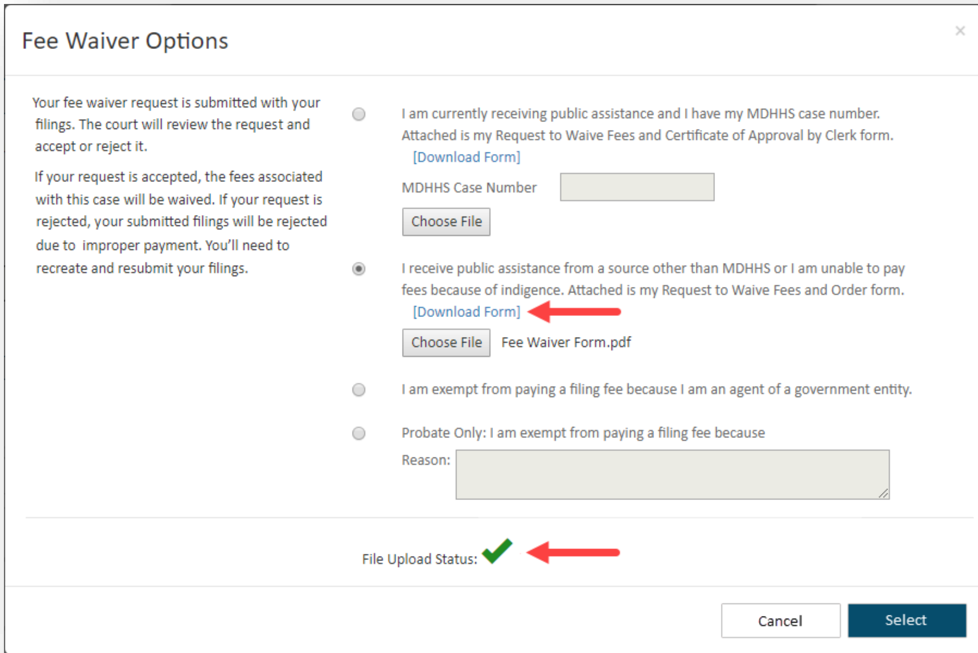
Note: Requests for waiver/suspension of trancript costs or mediation fees must be made separately by motion.

AFFIDAVIT

1. I ask the court to waive/suspend fees and costs for the following reason: (Check either a or b or c)
   - ☐ a. I am currently receiving public assistance: My MDHHS case number is ________.
   - ☐ b. I receive public assistance from a source other than MDHHS. The type, source, and case number (if any) are:
   - ☐ c. I am unable to pay fees and costs because of indigency, based on the following facts:
     My average gross income is about $ ________ every ☐ week. ☐ two weeks. ☐ month.
     ☐ I am receiving unemployment benefits.
     ☐ I am not employed.
     ☐ I have a vehicle: Year: ____ Make: ________ Model: ________ Amount Owed: $________
     The total amount in all my bank accounts is: $ ________
     Write down any other assets and how much they are worth. If you need more space, attach a separate sheet.
     I pay $ ________ in rent/mortgage every month. I pay $ ________ in utilities (water, electricity, gas) every month. I pay $ ________ for court-ordered child support. I pay $ ________ for court-ordered ________ (Specify).
     Write down any other obligations and how much you pay. If you need more space, attach a separate sheet.

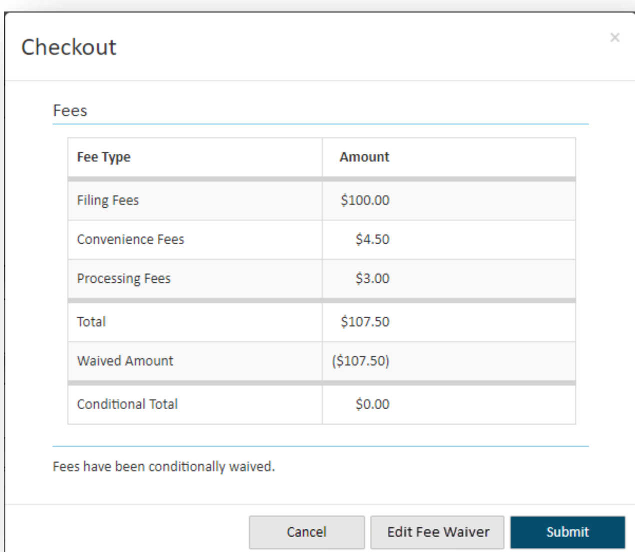
You may be able to complete the form in your browser and then save the document on your computer as a PDF file. You may also download or print the form, enter the required information, and scan it to your computer in a PDF format.

3. To upload the PDF file to the court, click **Choose File** (or **Browse**) on the Fee Waiver Options dialog.
4. In the dialog displayed, locate and select the waiver form PDF file.



A successful file upload is indicated, and the uploaded file is listed.

5. Click **Select**. The Checkout dialog is displayed, and the fees are zeroed out as a Conditional Total.



6. Click **Submit**.

Your request is submitted with your filings. The court will review the request and accept or reject it. If it's rejected, your submitted filings will be rejected due to improper payment. You'll need to recreate and re-upload your filings.

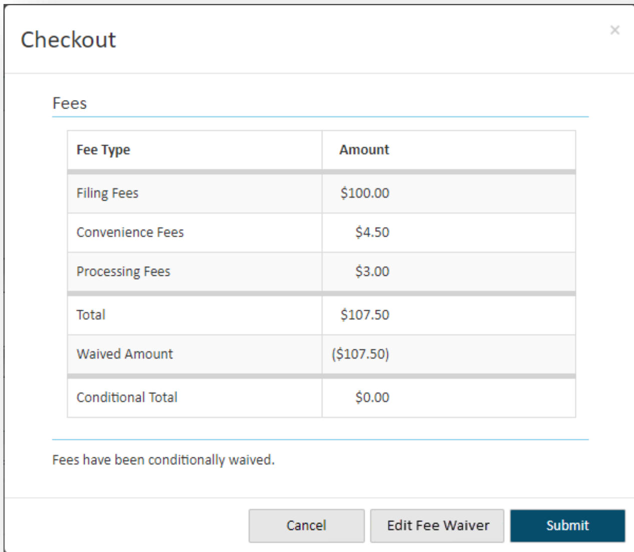
The fee waiver form will be listed on the History page under the My History tab.

See also:

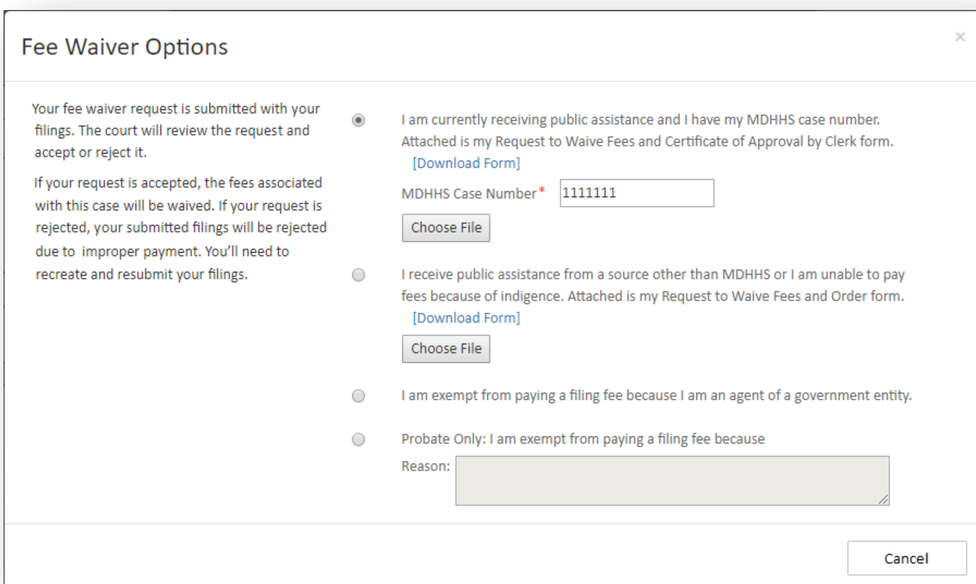
Change your Waiver Type for details on changing the fee waiver type you selected before submitting to the court.
Remove your Waiver Request for details on removing the request.

Change your Waiver Option

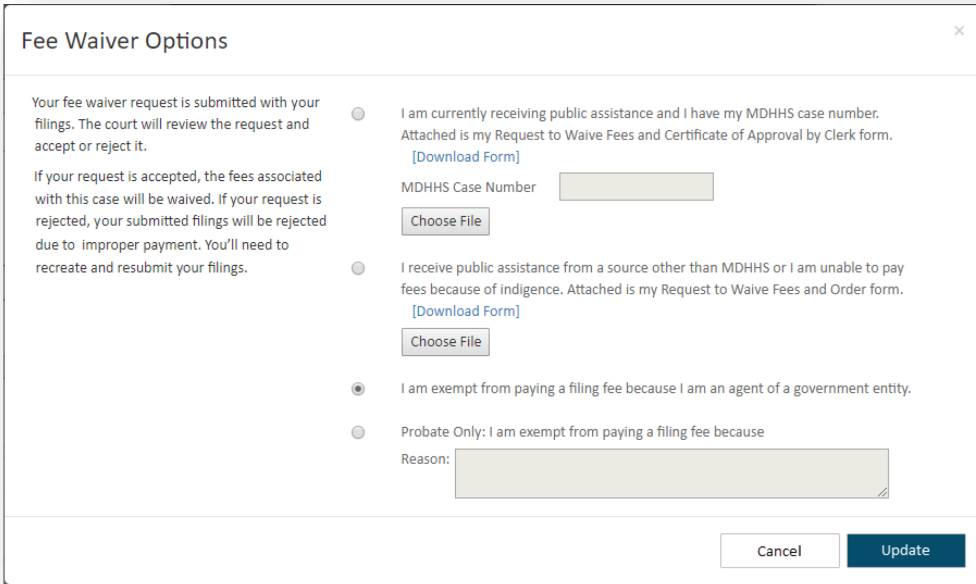
Before you submit to the court, you can change the fee waiver option you selected.



1. Click the **Edit Fee Waiver** button on the Checkout dialog. The Fee Waiver Options dialog is displayed.



2. Select the correct option.

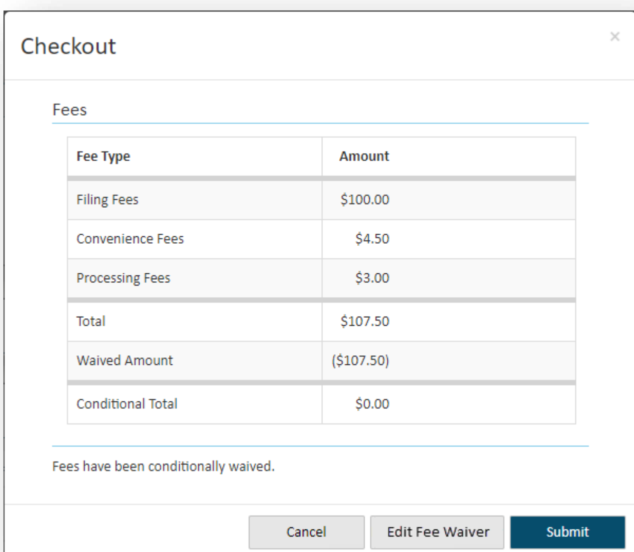


3. Click **Update**.

The Checkout dialog is re-displayed. Your waived amount will be listed in the Fees pane.

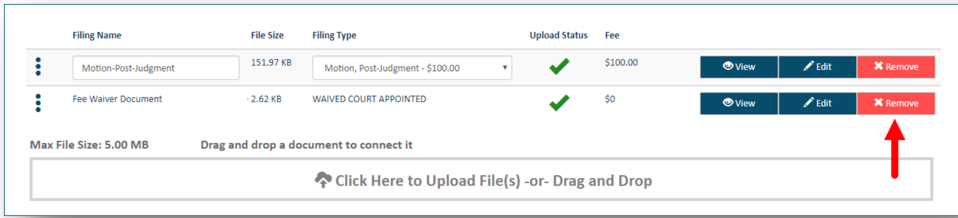
Remove your Waiver Request

If you want to remove your request to waive fees before you submit your filings:



1. On the Checkout dialog, click **Cancel**.

The Upload pane is re-displayed. The fee waiver request is listed.



2. Click the **Remove** button on the Fee Waiver Document line item to remove the request.

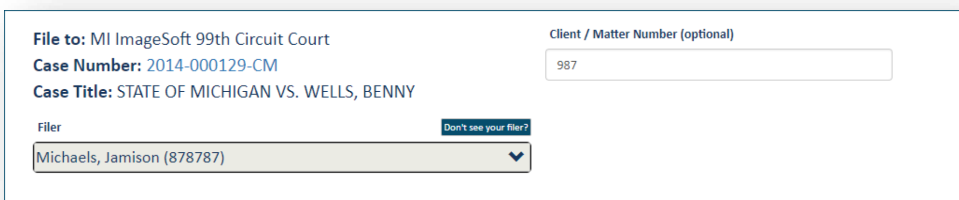
You can now submit the filing without the fee waiver request. You will need to select a payment account when you check out.

Submit an Ad Hoc Payment to the Court

Some courts will allow you to submit an additional payment for a case. You'll access this functionality through the Case Details page.

1. Launch the appropriate Case Details page. Perform a case search, if needed, and select the Case Number from the search results.

2. Click the **Pay Additional Amount** button. The File pane is displayed.



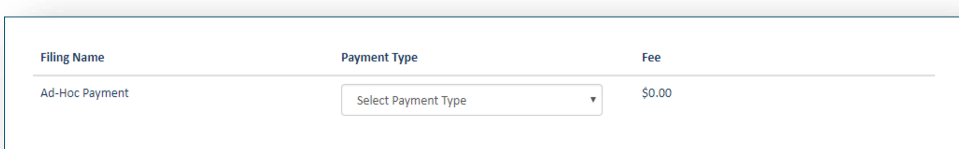
3. Input a **Client/Matter Number**, if one is required.
4. Select the arrow in the **Filer** field to display a list of possible filers.

   This list is populated with eligible filers you're connected to. If you have an assigned user role, your name will be listed as well.

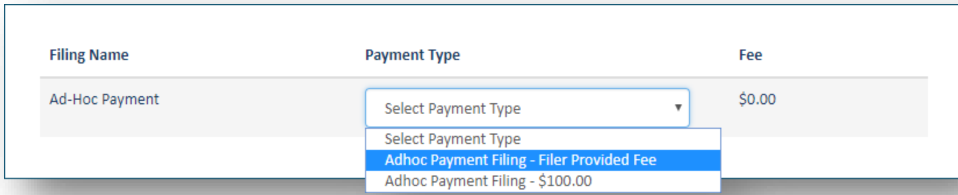
   If the filer you want isn't listed, click **Don't see your filer**. Refer to <u>Where's my Filer</u> earlier in this guide for details on locating the filer.

5. Select the **Filer**.

   Once they're selected, an additional pane is displayed.



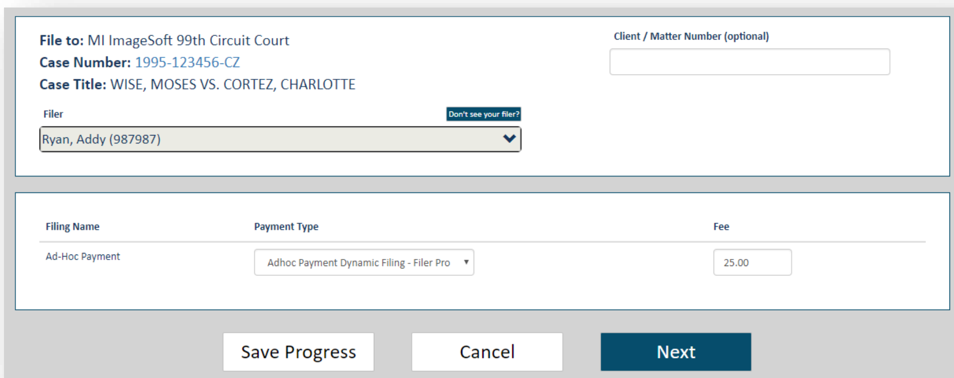
The **Filing Name** defaults to **Ad-Hoc Payment**.



6. Select the appropriate payment type from the **Payment Type** field drop-down list.

   The payment type may be dynamic or static. A dynamic payment requires the user to input the amount paid, whereas the amount of the static payment is set by the court.

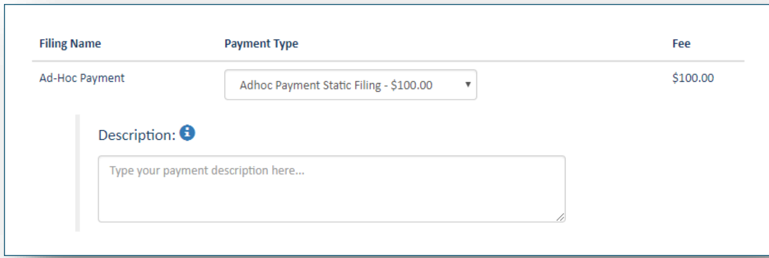
   If you select a court specified payment type, the associated amount will auto-populate the **Fee** field.



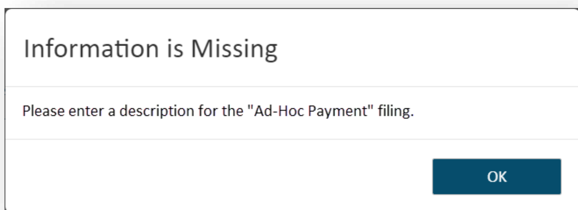
7. If you select the **Filer Provided Fee** option, input your payment amount in the **Fee** field. Enter a valid numeric value; for example, **25.00**. You must input a value greater than $0.00.

   The court can configure the fee format. For example, a court can choose to accept only whole dollar amounts and not allow decimal values ($50 vs $50.15).

Note: The court can configure certain ad hoc payment types to require information from the filer. If such a payment type is selected, a **Description** field is displayed.



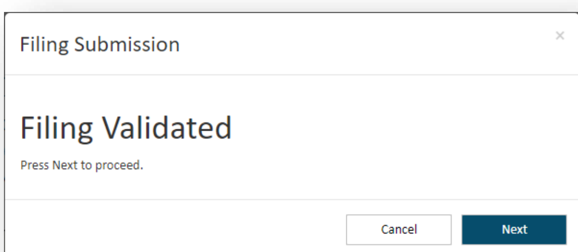
Input details about the payment in this field.
If you fail to input a description, this dialog will display when you click **Next** to submit your payment.



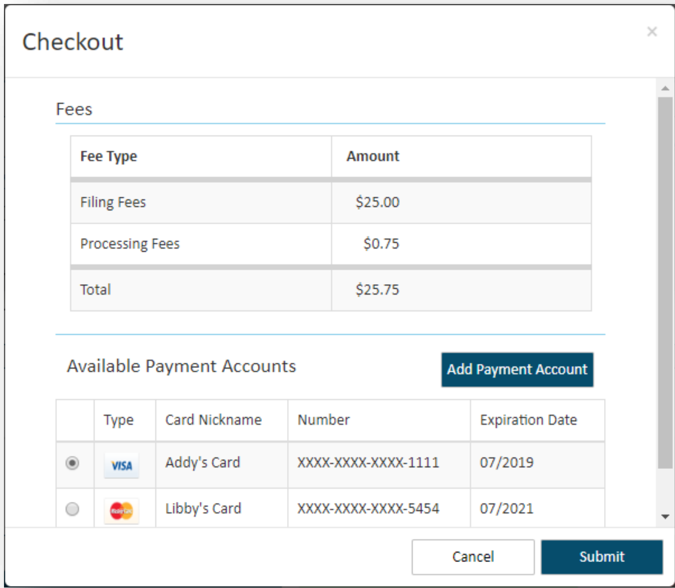
Click **OK** to close the dialog and input the required description.

8. Click **Next** on the Upload payment to submit your payment to the court.

   Your submission is validated.



9. Click **Next**.

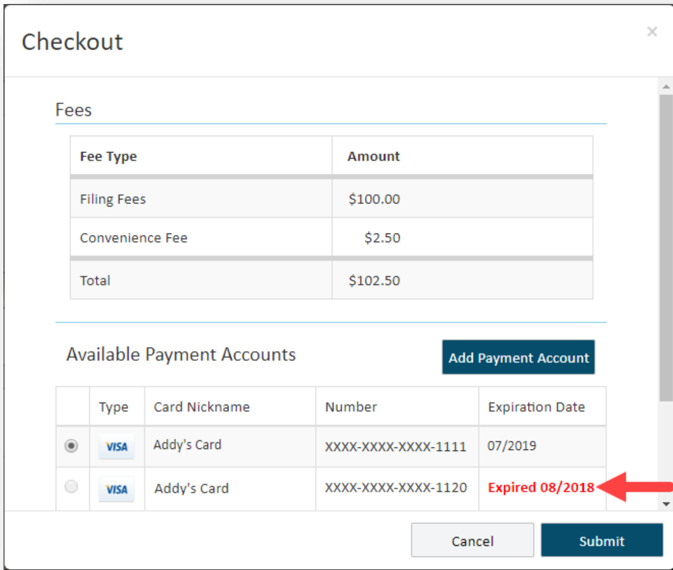


Any processing fees mandated by the court for the ad hoc payment type you selected will be computed based on the amount you pay.

10. In the Checkout pane, confirm the fees listed are correct.
11. Select the appropriate **Payment Account**. Depending on court rules, a payment account can be a credit card, escrow account, or inter agency transfer account. Escrow and inter agency transfer accounts must be authorized by the court. Refer to the Glossary for more information on these account types.

    If no payment accounts are listed, click the **Add Payment Account** button. See Add a New Payment Account for details on how to add an account.

Expired payment accounts are identified as such on the Checkout dialog and cannot be selected for payment.



12. Click **Submit** to submit your payment to the court. A confirmation dialog is displayed when the submission is successful.
13. Click **OK** to close the dialog.

The History page is displayed. Your ad hoc payment is listed under the **My History** tab.

If you click the **Ad hoc payment** Filing Name, properties related to the payment are displayed just as they are for a court filing document. See Filing History and Properties for details.

Also see Download your Filing's Payment Receipt for details on accessing and downloading the payment receipt.

If your notification settings are set to notify you when a payment transaction occurs, you'll be notified via text and / or email.

Initiate a New Case

Not all courts allow new case initiation through TrueFiling. If case initiation is available, the **Initiate New Case** button is shown in the File pane after you've selected your court. The court determines which case types can be initiated through TrueFiling.

TIP: Perform a search to ensure your case doesn't already exist. See Perform a Search to Access your Case.

The court and case type you want to initialize determines what information you must provide. The process for case initiation is somewhat standard. However, the user input required is completely dependent on the court and case type you choose.

1. In the navigation pane, under Main Pages, click **File**.
2. Select the **Court** you'll file in.
3. Click **Initiate a New Case**.
4. Select the arrow in the **Filer** field to display a list of possible filers.

   This list is populated with eligible filers you're connected to. If you have an assigned user role, your name will be listed as well.

5. Select the **Filer**. If you're filing on behalf of a connection, select their name.

   If you cancel out of the case initiation process and re-start it using a different court, you'll need to re-select the filer.

6. Select the **Case Category** or **Case Type**. The type you select determines the forms you'll use to initiate the case.

   Click **Next** to move between form tabs or form panes.

7. Input the **Party Details** or **Party Information**; for example, the plaintiff, defendant, petitioner, and representing attorneys.
8. Input the **Case Information** or **Case Details**.

   A notice is displayed if the court requires specific filing documents be submitted with the case initiation forms.

9. To upload any required filing documents, click **Choose File** (or **Browse**) and locate and select the appropriate document files in the dialog displayed.

   In some courts, you may be able to download a required document, such as a cover sheet. Complete the form, save it locally to your computer, and then upload it as detailed in step 9.

10. Click **Finish** or **Save**.

The Upload pane is displayed. The case initiation form and any filings are listed. You may also be able to upload any additional required filing documents through the Upload pane.

If enabled by the court, an edit option will be available on the Upload pane so you can modify the information you input in the case initiation form. You cannot, however, edit the case title or case type. You can also edit saved case initiation forms you retrieve through the Unsubmitted tab on the History page.

The court determines if case initiation filings can be served. If servicing is not allowed, the Serve Document option will not be available in the File pane.

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11. Proceed to select any required service recipients. See Select the Service Recipients for details.
12. Submit the filings and check out. See Submit your Filings and Check Out.

    In some courts for certain civil cases, if the case involves monetary claims, TrueFiling will compute the filing fee you'll be charged based on the claim amount you input in the Case Information or Case Details section.

Once you've submitted the case initiation filing to the court, a temporary case number is assigned.

If you selected to eServe the filings, a Proof of Service is generated and delivered to the Clerk. Based on court configuration, a Proof of Service may be generated for the entire bundle of filings, or a Proof of Service may be generated for each document in the bundle.

The court will review the case initiation submission and related documents. If the case is accepted, a permanent case number will be assigned.

View the Register of Actions / Request the Case File

The Register of Actions is a chronological list that details the date and/or description of actions, documents, and participants in a case. The list can include the names of the attorneys for the plaintiff and defendant, presiding justice name, complaints, motions, exhibits, and others.

A court can make the Register of Actions available through TrueFiling. In such courts, you can request electronic access to one or more case file documents. See Request the Case File later in this section.

View the Register of Actions

In some courts, the Register of Actions is available through the court's website. You can access this website through a link in TrueFiling.

1. Access the appropriate Case Details page.

   If needed, select **Case Search** under Main Pages in the navigation pane to perform a search and locate the case. In the search results, click the **Case Number** to launch the Case Details page.

   The court can be configured to prevent Standard contacts from accessing or viewing the Register of Actions for the case. As such, the **View Register of Actions** button will not be available if you are a Standard contact on this case. See What's a Case Contact >> Verified and Standard Case Contacts earlier in this guide for more information on Verified contacts.

2. Click the **View Register of Actions** button.

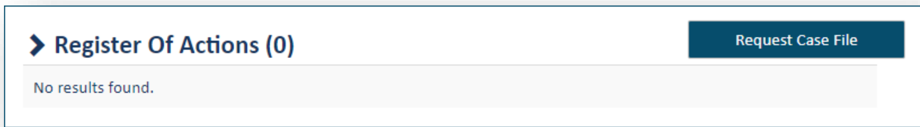
   You'll be re-directed to the court's website. Follow the directions presented there to access the Register of Actions and obtain any case files.

Request the Case File

If allowed by the court, you can send a request to the court to download the official case filings through TrueFiling.

1. Access the appropriate Case Details page.

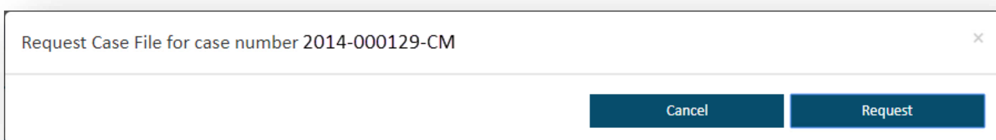
   If needed, select **Case Search** under Main Pages in the navigation pane to perform a search and locate the case. In the search results, click the **Case Number** to launch the Case Details page.



2. In the Register of Actions section, click **Request Case File**.

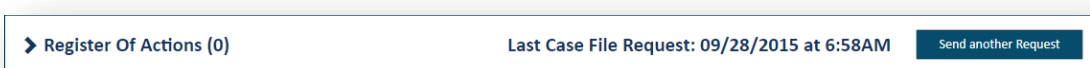
The court can be configured to prevent Standard contacts from accessing or viewing the Register of Actions for the case. As such, the **Request Case File** button will not be available in the Register of Actions section if you are a Standard contact on this case. See What's a Case Contact >> Verified and Standard Case Contacts earlier in this guide for more information on Verified contacts.

A confirmation dialog is displayed.



3. Click the **Request** button. The request for the case files associated with this case is sent to the court.

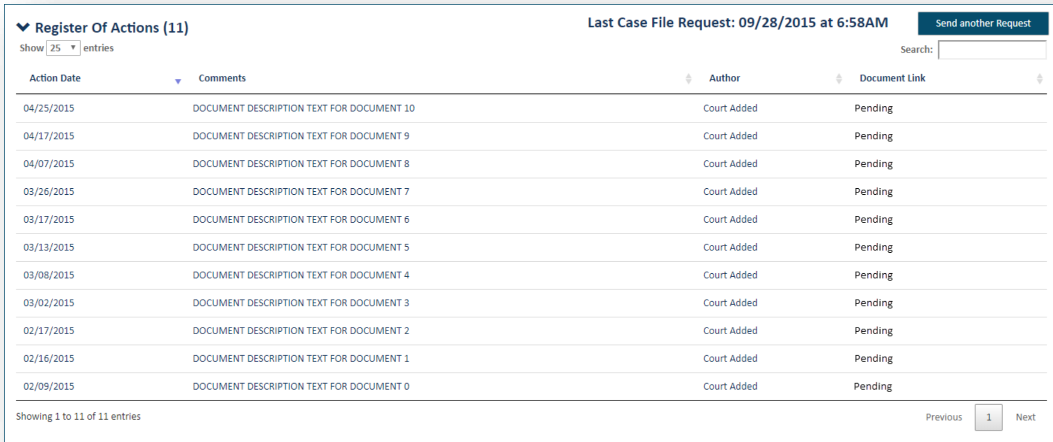
   The court will accept or reject the request. You'll receive an email indicating their decision. Note that this process is not instantaneous.



The date and time of the request is placed in the Register of Actions pane. This timestamp will remain until the case file documents are sent and are available for download.

If the request is accepted, the list of case file documents is sent.

Expand the Register of Actions pane to view the list. Some courts may return multiple renditions (such as the original, Filed stamped, or Certified copy) of a document. Each document's status will initially be **Pending**.

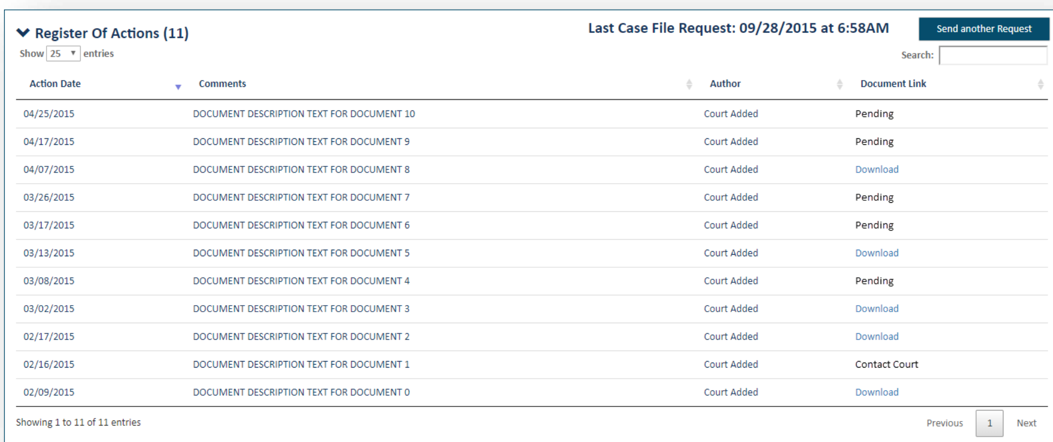

Register Of Actions (11) Last Case File Request: 09/28/2015 at 6:58AM Send another Request

Show 25 entries Search:

Action Date	Comments	Author	Document Link
04/25/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 10	Court Added	Pending
04/17/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 9	Court Added	Pending
04/07/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 8	Court Added	Pending
03/26/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 7	Court Added	Pending
03/17/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 6	Court Added	Pending
03/13/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 5	Court Added	Pending
03/08/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 4	Court Added	Pending
03/02/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 3	Court Added	Pending
02/17/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 2	Court Added	Pending
02/16/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 1	Court Added	Pending
02/09/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 0	Court Added	Pending

Showing 1 to 11 of 11 entries Previous 1 Next

Once the case file has been requested, the **Request Case File** button label changes to **Send another Request**. Click this button to resend the request to obtain the most up to date documents.


Register Of Actions (11) Last Case File Request: 09/28/2015 at 6:58AM Send another Request

Show 25 entries Search:

Action Date	Comments	Author	Document Link
04/25/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 10	Court Added	Pending
04/17/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 9	Court Added	Pending
04/07/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 8	Court Added	Download
03/26/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 7	Court Added	Pending
03/17/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 6	Court Added	Pending
03/13/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 5	Court Added	Download
03/08/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 4	Court Added	Pending
03/02/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 3	Court Added	Download
02/17/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 2	Court Added	Download
02/16/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 1	Court Added	Contact Court
02/09/2015	DOCUMENT DESCRIPTION TEXT FOR DOCUMENT 0	Court Added	Download

Showing 1 to 11 of 11 entries Previous 1 Next

After all the documents are sent, the Register of Action pane will list each document's status as either:

Download

Click the **Download** button to download the document. You can then save or print it locally.

Contact Court

No document was sent. You must contact the court regarding this document.

Tips for Locating a Case File Document

Use the display options to quickly locate a case file document.

- Use the **Show** field drop-down list to specify the number of entries to display. The default value is 25.
- Use the **Previous** and **Next** buttons at the bottom of the section to move between pages. You can also simply select the page number.
- Use the **Search** field to filter the entries displayed.
- By default, the grid is ordered base on the **Action Date** – most recent to oldest. You can sort on a column to re-order how the grid is displayed.
  1) Determine which column you want to sort.
  2) Click the column header. A small arrow is displayed beside the header.
  3) An upward arrow indicates ascending order (A to Z / oldest to newest / least to greatest); a downward arrow indicates descending order (Z to A / newest to oldest / greatest to least).
  4) Click the heading a second time to change the order.

  Only one column can be sorted at a time. Once a column sort is specified, existing sorts on other columns are removed.

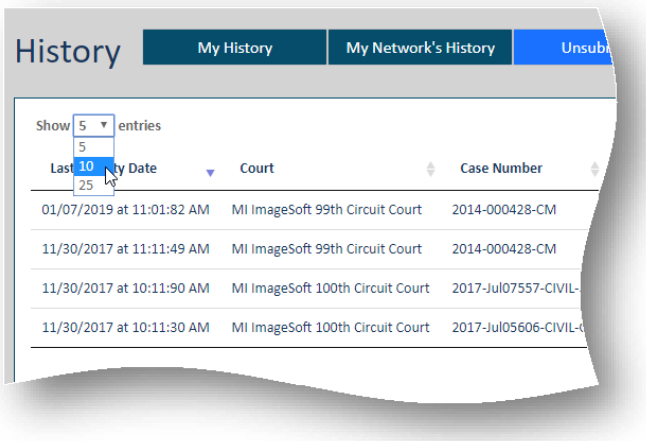
Filing History and Properties

The History page details your filing history, as well as your connections' histories. You can choose to view just your filing history (on the My History tab) or your connection network's filing history, which includes yours (on the My Network's History tab). You can also access filing bundles you've saved but haven't submitted to the court on the Unsubmitted tab.

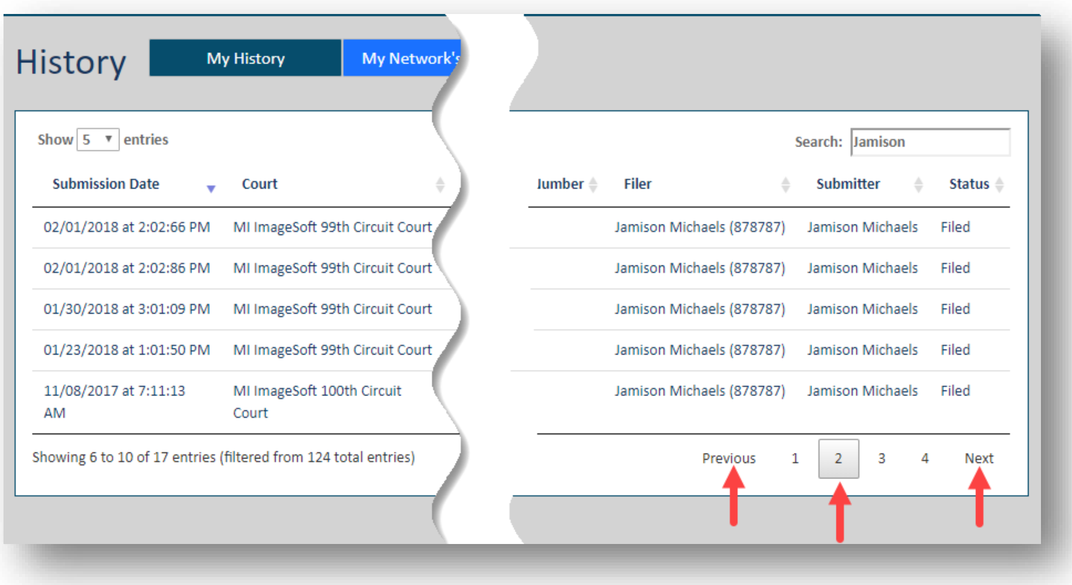
Helpful Tips for this Page

Use the display options to quickly locate your filings.

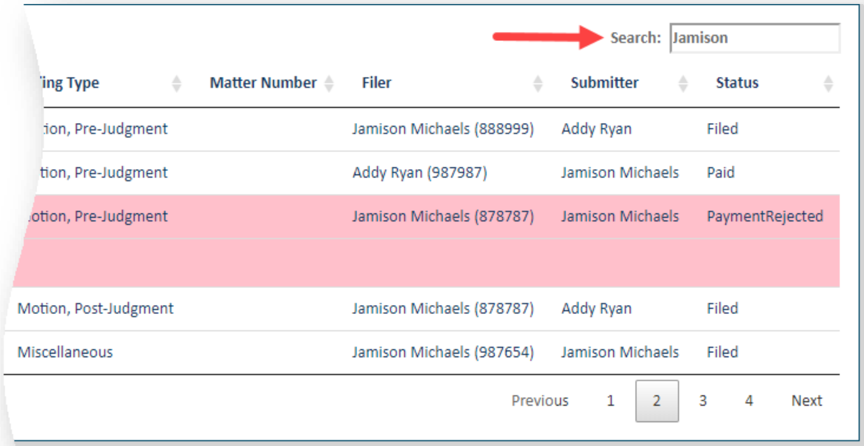
Use the **Show** field drop-down list to specify the number of entries to display. The default value is 5.



Use the **Previous** and **Next** buttons at the bottom of the page to move between pages. You can also simply select the page number.



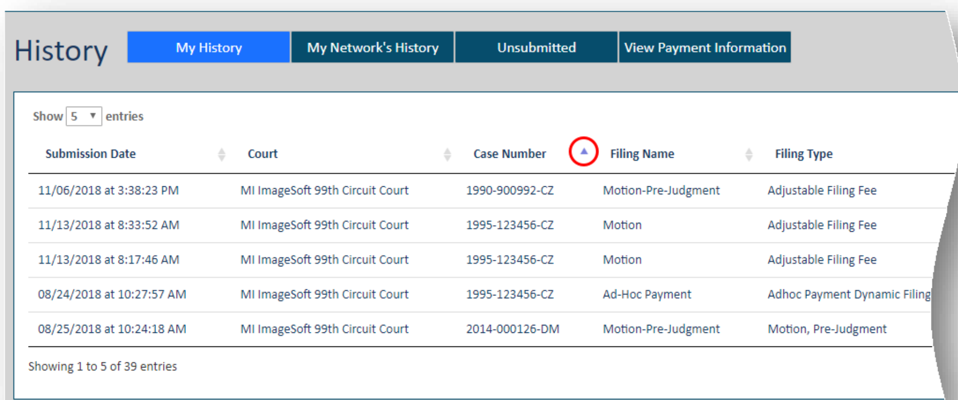
You can filter the entries displayed. Input criteria in the **Search** field. As you type, the transactions listed are filtered.



Re-order the Grid

By default, the grid is ordered based on the Submission Date or Last Activity Date (Unsubmitted tab) – newest to oldest. You can sort on a column to re-order how the grid is displayed.

1. Determine which column you want to sort.
2. Click the column header. A small arrow is displayed beside the header.



An upward arrow indicates ascending order (A to Z / oldest to newest / least to greatest); a downward arrow indicates descending order (Z to A / newest to oldest / greatest to least).

3. Click the heading a second time to change the order.

Only one column can be sorted at a time. Once a column sort is specified, existing sorts on other columns are removed.

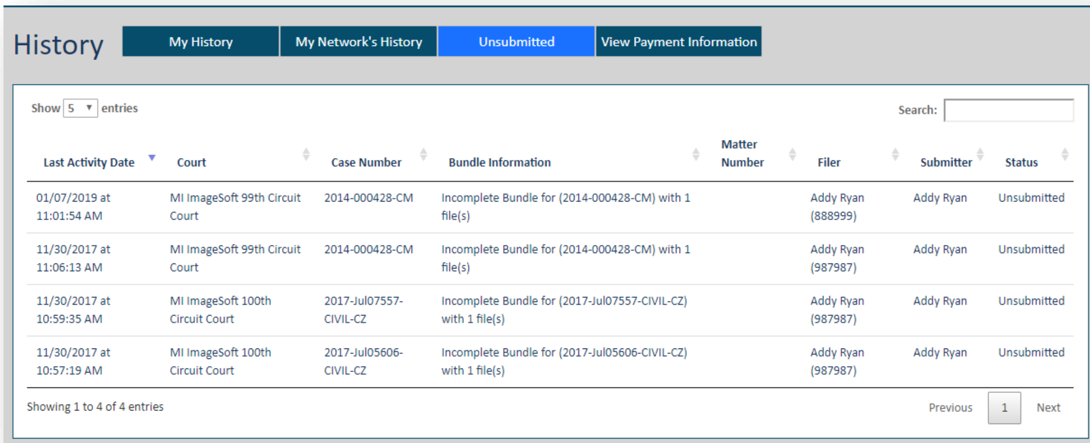
See Submitted Filing Properties for details on accessing the properties of filings you and your connections have submitted to the court and downloading related documents.

Unsubmitted Filings

Select the Unsubmitted tab to access filings you've saved but have not yet submitted to the court.

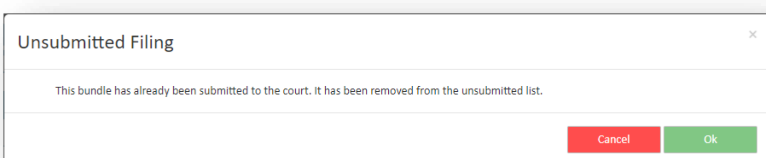
If you have no unsubmitted bundles, a message is displayed to let you know.

1. Click **History** under Main Pages in the navigation pane.
2. Select the **Unsubmitted** tab.



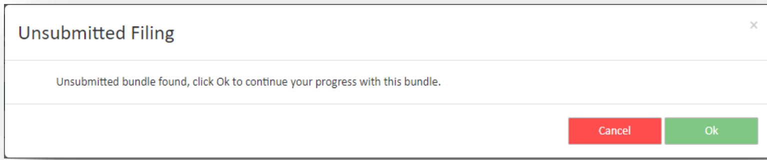
The court can't see and has no knowledge of these bundles. This tab lists only filing bundles you've saved; bundles your connections have saved aren't listed.

3. Locate and select the appropriate entry in the **Bundle Information** column.
   TrueFiling will validate that the selected bundle hasn't been submitted to the court. If it has been submitted, this dialog is displayed:



   a. Click **OK**. The filings associated with the bundle will be removed from the Unsubmitted tab.

If the bundle hasn't been submitted, this dialog will display:



a. Click **OK**. The Upload pane will launch, where you can continue to add filings to the bundle and select service recipients. See Access a Saved Filing for details.

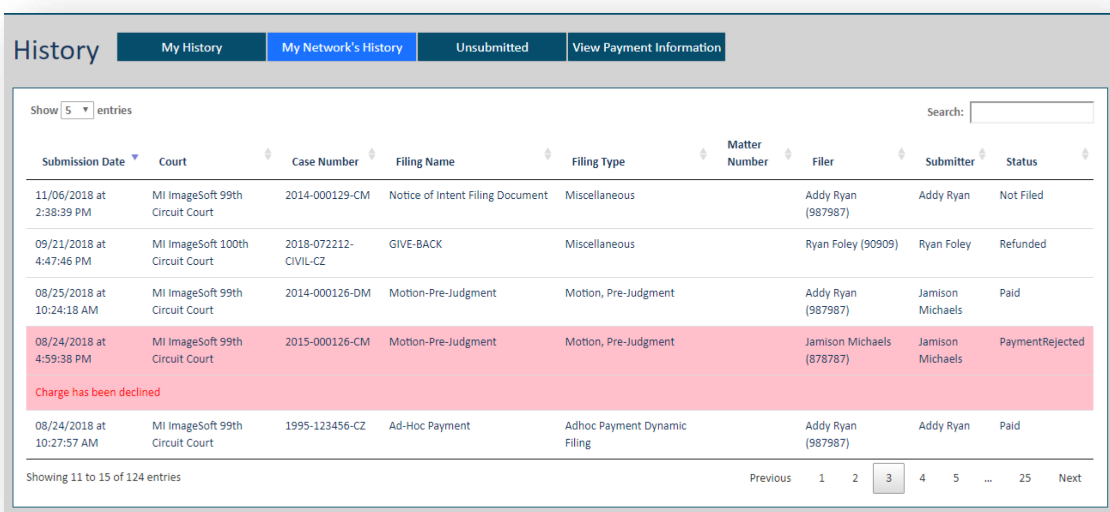
When enabled by the court, if you selected a case initiation bundle, an edit option will be available on the Upload pane so you can modify your original case initiation form. You cannot, however, edit the case title or case type.

Submitted Filings

For each filing submitted to the court, you can view the filing details, its properties, its status, and who's been served (and if they've accessed the filing document).

If you or your connections have no submitted filings, a message is displayed to let you know.

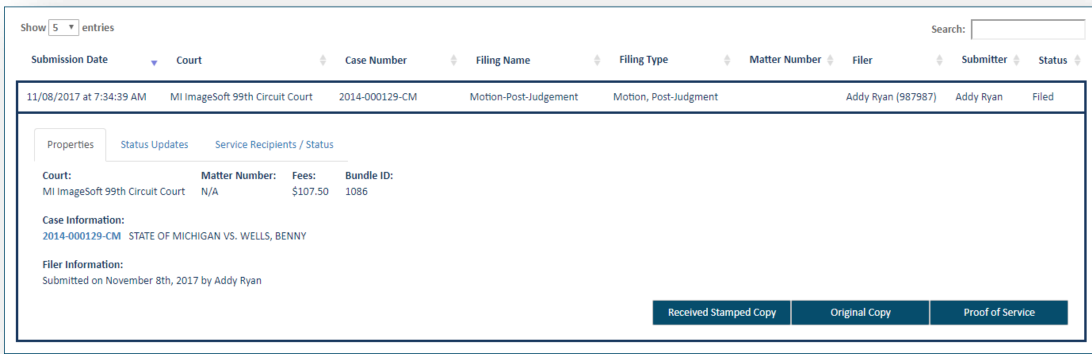
1. Click **History** under Main Pages in the navigation pane.
2. Specify which filings to display:
   - **My History** - filings submitted to the court by you or by a connection on your behalf
   - **My Network's History** - filings submitted by you and those in your connection network



Submitted Filing Properties

To access the properties of a submitted filing and download related documents:

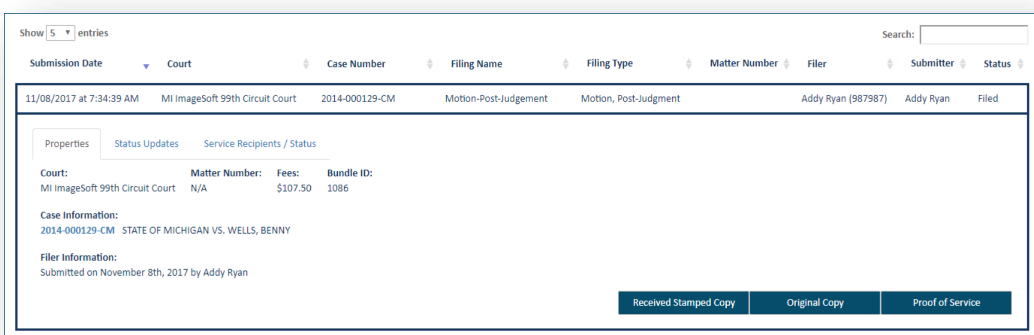
1. Select the **My History** or **My Network's History** tab.
2. Locate the filing and click the **Filing Name**. A pane with three tabs is displayed. (Click the Filing Name once more to retract the pane.)



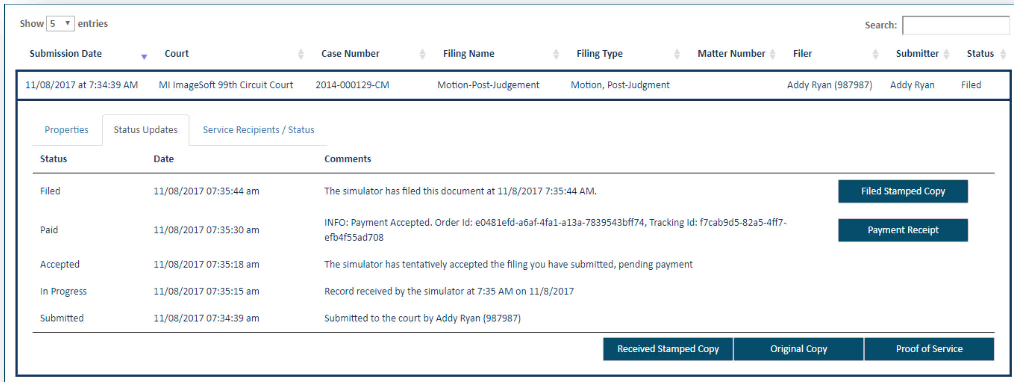
The details and history of the filing are accessed through these tabs:

- **Filing Properties**
  The Properties tab lists details about the case, as well as who submitted the filing and when it was submitted.

  You can click the Case Number (listed below **Case Information**) to launch the Case Details page, which lists the case contacts and any filings submitted to the court.



- **Status Updates**
  The status of your filings with respect to the court is listed.



Statuses include:

Submitted - The filing data was submitted by the filer to the system for the Clerk to review. <u>The filing is NOT yet part of the official case record.</u>
In Progress - The filing data has reached the court's filing review system. <u>The filing is NOT yet part of the official case record.</u>

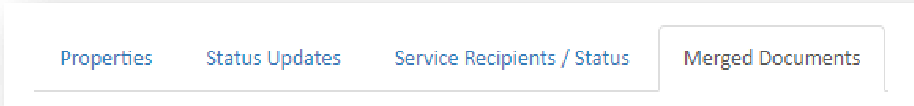
Note: If the court sends an email message to a filer through the filing review process, the comments in the email will be displayed in a line item with an **In Progress** status.

Accepted - The filing is now ready for payment to be collected. When the filing reaches this state, it is in queue for the Clerk to review. <u>The filing is NOT yet part of the official case record</u>.
Paid – Payment processing is complete. If the filing required payment, the specified payment account was charged, and a receipt is available. <u>The filing is NOT yet part of the official case record.</u>
Filed - The filing has been accepted by the Clerk, and the filing IS now part of the official case record.
Rejected - The filing has been rejected by the Clerk. The reason for rejection is listed.
Not Filed - This is the final status of a filing that was served but not filed.
Payment Rejected - Payment for the filing failed. Reasons can include an expired credit card, a closed account, insufficient funds, or that the card was deleted from TrueFiling.
Refunded - A payment charged for the filing has been refunded.

Important: If the court refunds a payment charged for a filing, the credit card service fee is not refunded.

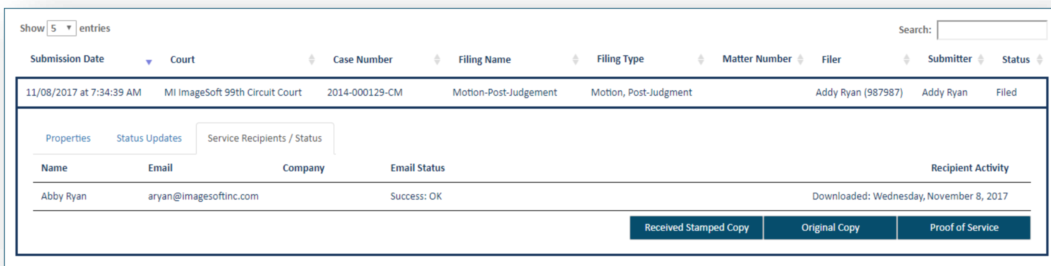
Refund Attempted - The court has requested a refund of the fee.
Refund Failed – The fee refund requested by the court has failed.

If the selected filing is a merged document, a fourth tab - **Merged Documents** - is present.



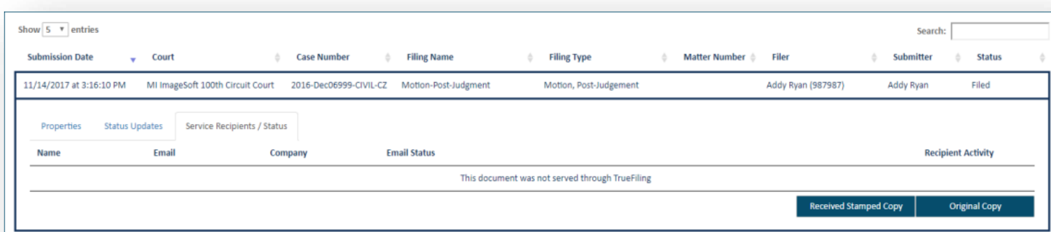
Select this tab to display a list of the documents that comprise the merged document. See View and Download Merged Documents earlier in this guide for details.

- **Service Recipients / Status**
  When this tab is selected, the **Email Status** column indicates if the servicing email delivery succeeded or failed. The **Recipient Activity** column specifies if and when the documents were accessed.



The court can be configured to display the available email statuses when you hover your cursor over the **Email Status** column header.

If the filing was submitted as File Only (not served), a message indicating that fact is displayed.



On the History page, you can download documents related to your filings such as the original and stamped copies of your filings, as well as any Proofs of Service and payment receipts. See Download Documents Related to your Filing for details.

View and Export your Payment Transactions

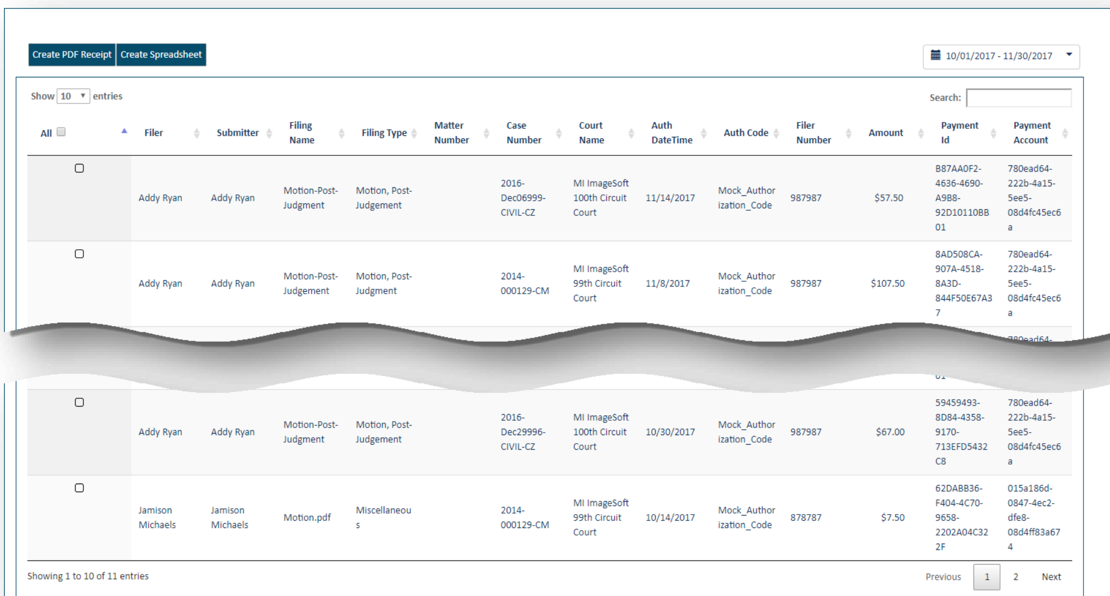
You can view a comprehensive payment history of your connection network's payment transactions, which includes your own.

You can subsequently create a payment receipt for selected payment transactions and generate a spreadsheet containing payment data for a specified date range. See Create a Payment Transaction Receipt and Generate a Payment Transaction Spreadsheet later in this section.

1. Select **History** under Main Pages in the navigation pane.
2. Select **View Payment Information**.

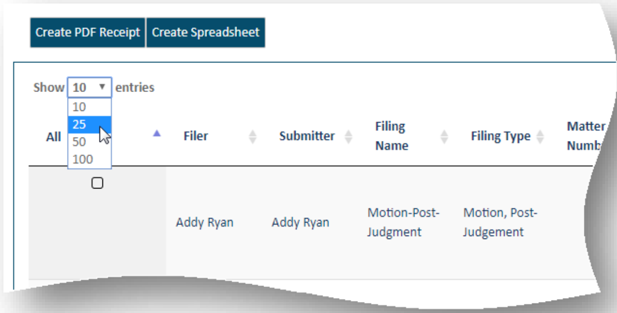
   A grid listing the transactions for the last 30 days is displayed. Each line item in the grid lists the filing details, along with the payment amount, payment date, and the account used. Refunded amounts display in parentheses.

Payment amounts of $0.00 are not listed.



Helpful Tips to Locate your Transaction

Use the **Show** field drop-down list to specify the number of entries to display. The default value is 25.



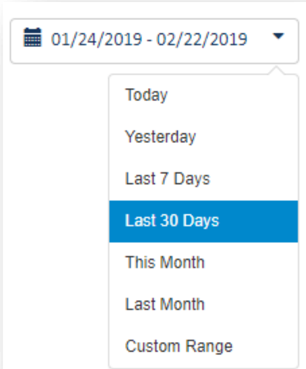
Use the **Previous** and **Next** buttons at the bottom of the page to move between pages. You can also simply select the page number.

You can manipulate what is shown on the transaction grid and how it's displayed. See:

- Change the date range
- Apply a custom date range filter
- Filter the Payment Transactions grid
- Re-order the Payment Transactions grid

Change the Date Range

You can change the date range of the transactions displayed.

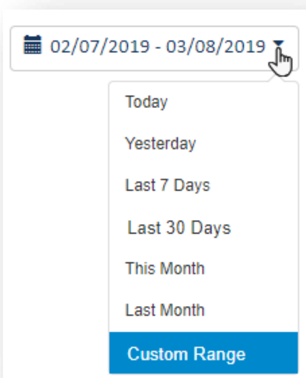


1. Select the arrow in the **Date** field to expose the filtering options.
   The filter initially defaults to the last 30 days. However, the most recently applied filter will become the default as long as you remain on the page.

2. Select the appropriate filter. You can also apply a custom date range filter. See below for details.

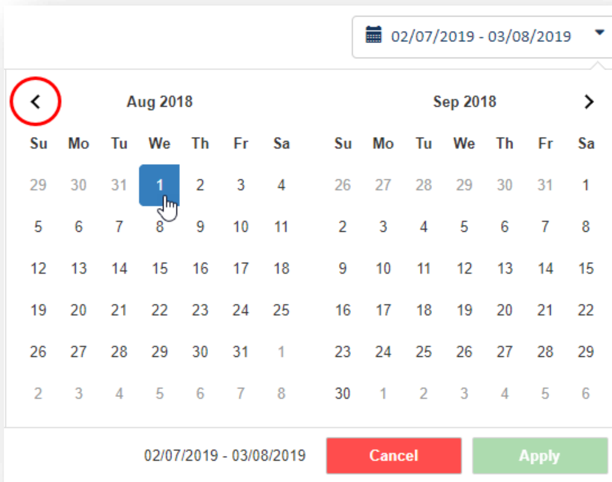
Apply a Custom Date Range Filter

You can display payment transactions that occurred within a specific date range.

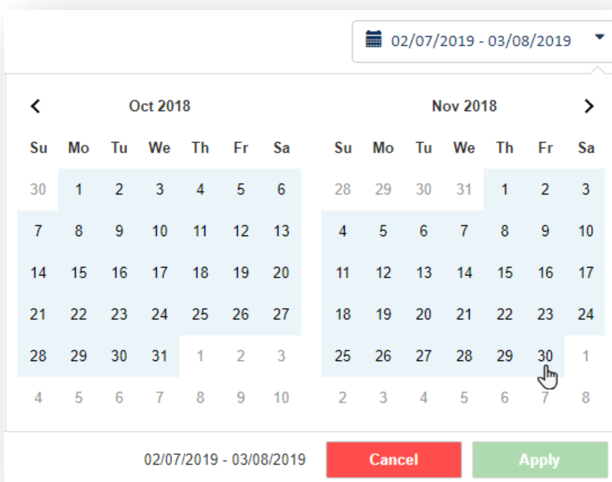


1. Select the arrow in the **Date** field.
2. Select **Custom Range**.

A date picker calendar is displayed.

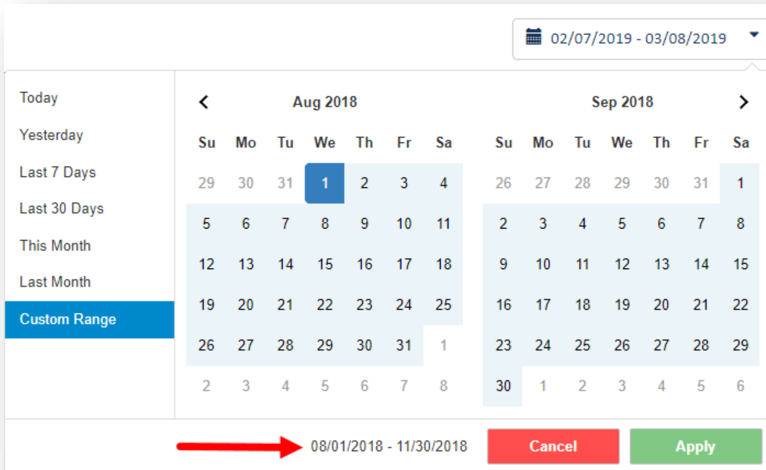


3. Navigate to and select the range's start date. Use the **< >** icons to move between months.



4. Navigate to the range's end date.
5. Select the end date.

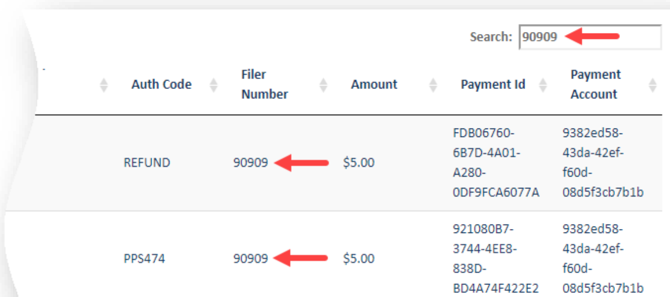
The selected range is listed.



6. Click **Apply** to re-display the transactions based on the selected range.

Filter the Payment Transactions Grid

To filter the transactions displayed, input criteria in the **Search** field. As you type, the transactions listed are filtered.



Re-order the Payment Transactions Grid

By default, the grid is ordered by the **Auth DateTime** column in descending (newest to oldest) order.

You can sort on a different column heading to re-order how the grid is displayed.

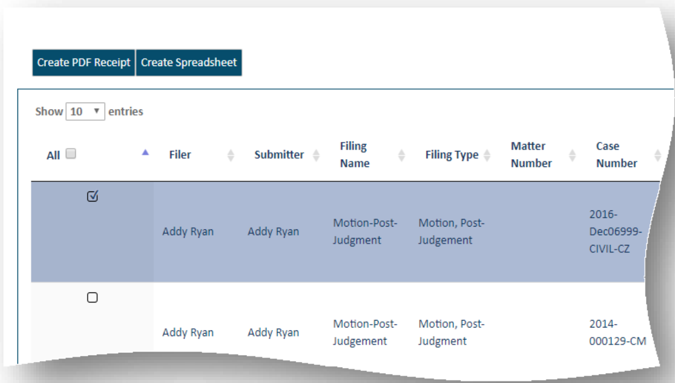
Click the heading once to sort in ascending (A to Z / oldest to newest / least to greatest) order.
Click again to sort in descending (Z to A / newest to oldest / greatest to least) order.

The sort column is highlighted in gray.

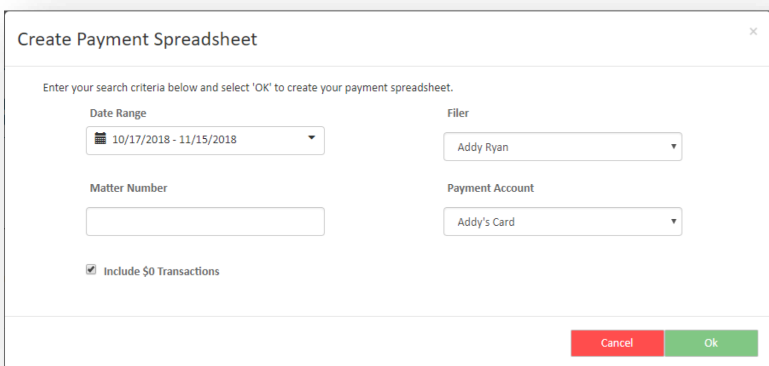
Generate a Payment Transaction Spreadsheet

You can generate a spreadsheet that contains your payment data.

Refunded amounts will display in parentheses.



1. Select the **Create Spreadsheet** button.



2. Click the arrow in the **Date Range** field to specify the transaction dates to include in the spreadsheet. This field is required.

   You can filter the payment data that's included in the spreadsheet.

3. To include payments associated with a specific filer, select the arrow button in the **Filer** field and select the appropriate filer from the list presented.
4. To include payments made from a specific payment account, select the arrow button in the **Payment Account** field and select the account from the list presented. The list is populated with the credit card nicknames.
5. To include payments associated with a certain matter number, input the number in the **Matter Number** field.
6. Select the checkbox to include transactions of $0 payment.

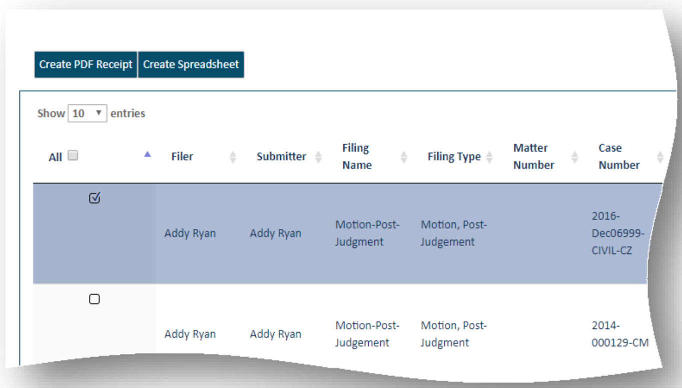
7. Click **OK**.

The spreadsheet is downloaded to your computer. You can access your Downloads folder, open the file, and save it, or you can open the file in Microsoft Excel and then save / print it.

You can also create a payment receipt for selected payment transactions.

Create a Payment Transaction Receipt

You can generate a PDF file that contains selected transaction receipts.



1. On the History page, click **View Payment Information**.
2. For each receipt to generate, select the checkbox beside the appropriate transaction. You **must** select at least one transaction to generate a receipt.
3. Select the **Create PDF Receipt** button.

   The PDF file containing the receipts is downloaded to your computer. You can access your Downloads folder, open the file, and save the receipt.

   In some browsers, the PDF file may launch in a separate window. From within that window, you can save and / or print the file.

You can also generate a spreadsheet of payment transaction data. See Generate a Payment Transaction Spreadsheet.

Download Documents Related to your Filing

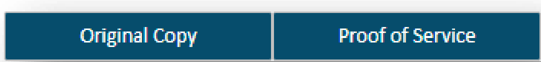
Documents related to your filings are generated by the court or TrueFiling during the submission, review, and filing processes. These documents include the stamped (Received, Rejected, and Filed) copies, payment receipts, and automatically generated Proofs of Service.

You can download these documents through the History page or through the Filings section on the Case Details page. Proceed to the end of this section for details on downloading the documents through the Case Details page.

Download the Original Document

To download a copy of the document you submitted:

1. Select **History** under Main Pages in the navigation pane.
2. Select the **My History** or **My Network's History** tab.
3. Locate the appropriate filing.
4. Click the **Filing Name**. The Properties pane will expand.



5. Click the **Original Copy** button.

   The document will display in a separate browser window. From within that window, you can save a copy for your records and print it.

   Note: When the selected filing is a fee waiver eForm or a case initiation eForm, the Original Copy button is not visible. However, the Original Copy button is available if you uploaded a fee waiver or case initiation document.

Download the 'Received' Stamped Copy

Some courts will stamp the original document as "Received" when the court receives it. You can download this copy of the document.

1. Select **History** under Main Pages in the navigation pane.
2. Select the **My History** or **My Network's History** tab.
3. Locate the appropriate filing.
4. Click the **Filing Name**. The Properties pane will expand.

5. Click the **Received Stamped Copy** button.

   The document will display in a separate browser window. From within that window, you can save a copy for your records and print it.

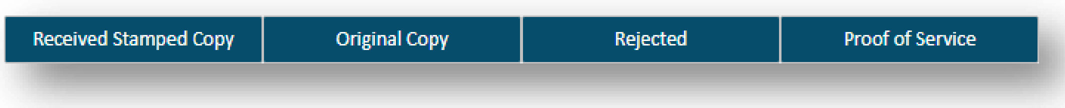
   Note: When the selected filing is a fee waiver eForm or a case initiation eForm, the Received Stamped Copy button is not visible.

If the filing was served but not filed with the court, the **Received Stamped Copy** button is not present.

Download the 'Rejected' Stamped Copy

Some courts will stamp a document as "Rejected" if the court has rejected it. You can download this copy if it's available.

1. Select **History** under Main Pages in the navigation pane.
2. Select the **My History** or **My Network's History** tab.
3. Locate the appropriate filing.
4. Click the **Filing Name**. The Properties pane will expand.



5. Click the **Rejected** button.

   The document will display in a separate browser window. From within that window, you can save a copy for your records and print it.

   Note: When the selected filing is a fee waiver eForm or a case initiation eForm, the Rejected button is not visible.

Download the 'Filed' Stamped Copy

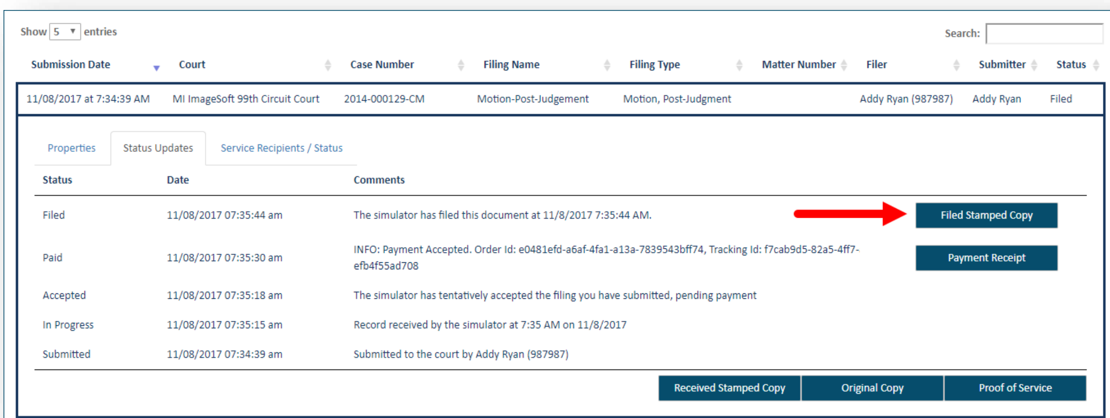
The official Filed stamped copy is usually a "Filed" stamped version of the submitted document. However, each court may have its own unique version.

Once the filing is officially filed by the court, you can download the Filed stamped copy of the document.

Depending on court rules and your TrueFiling notification settings, you may be able to download the Filed stamped copy through your email notification. Note that, fee waiver eForms and case initiation eForms are not stamped as Filed. As such, if the notification is related to an eForm, the link will direct you only to the original version of the eForm.

IMPORTANT: The court doesn't provide an official Filed stamped copy on paper when using TrueFiling. Therefore, it's very important to save a copy of the Filed stamped version for your own records and case file.

1. Select **History** under Main Pages in the navigation pane.
2. Select the **My History** or **My Network's History** tab.
3. Locate the appropriate filing.
4. Click the **Filing Name**. The Properties pane will expand.



5. Click the **Status Updates** tab to display the status of the filing with regard to the court.
6. Locate the line item associated with the **Filed** status.
7. Click the **Filed Stamped Copy** button. This button is available only if the court has filed the document.

   The document will display in a separate browser window. From within that window, you can save a copy for your records and print it.

Note: When the selected filing is a fee waiver eForm or a case initiation eForm, the Filed Stamped Copy button is not visible.

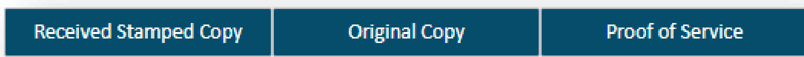
Download the Proof of Service

If you choose to serve a case's parties of interest through eServicing, and if the court requires a Proof of Service, TrueFiling will automatically generate a Proof of Service and submit it to the court. The Proof of Service will list all parties that were served, whether electronically, in person, by mail, or, when enabled by the court, via a courtesy copy.

Depending on court rules, a single Proof of Service may be generated for all filings submitted together.

To download the Proof of Service:

1. Select **History** under Main Pages in the navigation pane.
2. Select the **My History** or **My Network's History** tab.
3. Locate the appropriate filing.
4. Click the **Filing Name**. The Properties pane will expand.



5. Click the **Proof of Service** button.

   The Proof of Service will display in a separate browser window. It will resemble:

MI ImageSoft 100th Circuit Court Court Name	PROOF OF SERVICE	2016-Dec29996-CIVIL-CZ Case Number

1. At the time of service, I was at least 18 years of age.
2. My email address used to e-serve: **aryan@imgsft.com**
3. I served a copy of the following document(s) indicated below:

Title(s) of documents served:

- **Motion, Post-Judgement:** Motion-Post-Judgment

Person Served	Service Address	Type	Service Date
Addy Ryan	aryan@imgsft.com	e-Serve	01-04-2018 10:00:02 AM
		4402d610-8918-4f05-b740-4757d9197375	

TrueFiling created, submitted and signed this proof of service on my behalf through my agreements with TrueFiling. The contents of this proof of service are true to the best of my information, knowledge, and belief.

I declare under penalty of perjury that the foregoing is true and correct.

01-04-2018
Date

/s/Addy Ryan
Signature

Ryan, Addy (987987)
Last Name, First Name (Attorney Number)

Ryan Law
Firm Name

You can save a copy for your records and print it.

Download your Filing's Payment Receipt

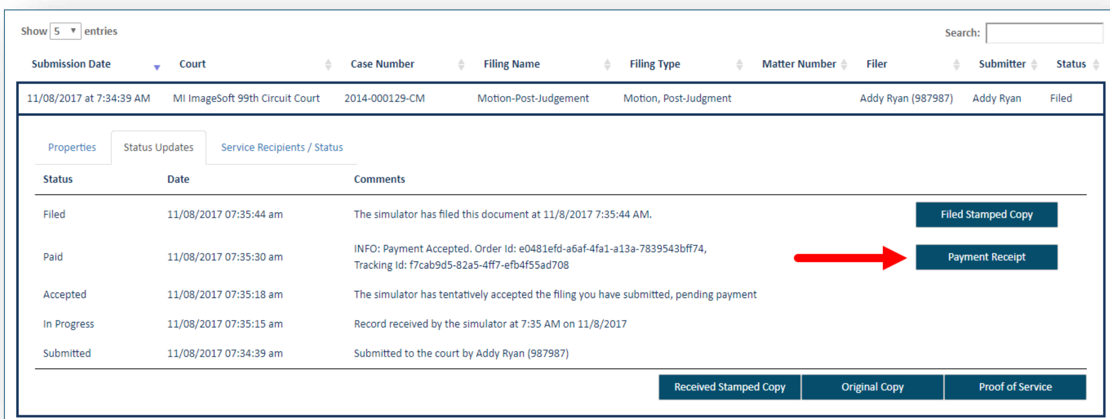
Every filing submitted to the court is accepted and authorized for payment individually. Thus, every filing will have a separate payment receipt detailing the amount charged (including $0.00 payment amounts), the authorization date and code, and any refunded amounts.

Multiple filings may be submitted together, and each filing may be charged individually. Court actions will determine if a charge is applied.

To download the payment receipt:

1. Select **History** under Main Pages in the navigation pane.
2. Select the **My History** or **My Network's History** tab.
3. Locate the appropriate filing.
4. Click the **Filing Name**.

   The Properties pane will expand.



5. In the expanded pane, click the **Status Updates** tab to display the status of the filing with regard to the court.
6. Locate the line item associated with the **Paid** status.
7. Click the **Payment Receipt** button.

The receipt will display in a separate browser window. From within that window, you can save a copy for your records and print it.

If you receive a refund for a submitted payment, you can download the refund receipt in the same manner. Instead of locating the line item with the **Paid** status, find the **Refund** status line item and click the **Payment Receipt** button.

Download Filing Documents from the Case Details Page

You can also download documents related to your filing from the Filings section of the Case Details page.

1. Access the appropriate Case Details page.
2. Expand the Filings section.
3. Locate and select the appropriate filing. A pane will expand, revealing the **Status Updates** button and the **Service Recipients / Status** button.
4. Click the **Status Updates** button.
5. Click the appropriate button – for example, **Filed Stamped Copy**.

   The document will display in a separate browser window.

   Note: Some courts may be configured to not allow fee waiver form downloads from within TrueFiling. In such courts, the download buttons are not visible. One exception, however, is if you uploaded the fee waiver. In such circumstances, you'll be able to view the original, uploaded fee waiver document, and the Original Copy button is available.

Manage your TrueFiling Account

You will manage your own notification settings, connections, and payment accounts. You can also deactivate your account if you choose.

Change your TrueFiling Password

You can change your password when you're logged in to TrueFiling.

1. Click **Settings** under Main Pages in the navigation pane.
2. Expand the **My Information** pane.
3. In the Update Password section, input your **Old Password**.
4. Input your **New Password**. The password must contain:
   - At least one lower-case letter [a-z]
   - At least one upper-case letter [A-Z]
   - At least one numeral [0-9]
   - At least one symbol [!@#^&*()+_,{}?-]
   - A minimum of 8 characters
   - A maximum of 20 characters
5. Confirm your **new password**.
6. Click **Change Password**.

Use your new password the next time you log in to TrueFiling.

Update your Contact Information

You can update your contact information on the Settings page.

1. Click **Settings** under Main Pages in the navigation pane.
2. Expand the **My Information** pane.
3. Update your contact information.
4. Click **Save**.

Add and Validate your Mobile Phone Number

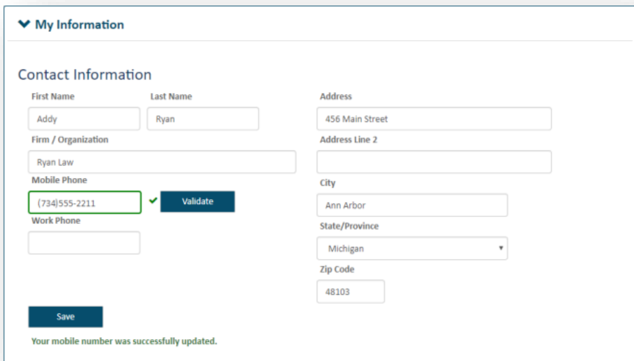
If you want to receive notifications about your filings via text message, your contact information must include a validated mobile phone number.

1. In the My Information pane, input your **Mobile Phone** number.
2. Click **Validate**. You'll receive a text message at the number you provided that contains a verification code.
3. Input the code in the **Verification Code** dialog.

If you didn't receive the text message or it was accidentally deleted, click the **Resend Verification Code** link to have another text sent.

4. Click **OK** to leave the dialog.

   When your number is successfully validated, a green check mark will display beside the **Mobile Phone** field.



You can now select the text option in the Notification Settings pane on the Settings page.

Manage your User Role

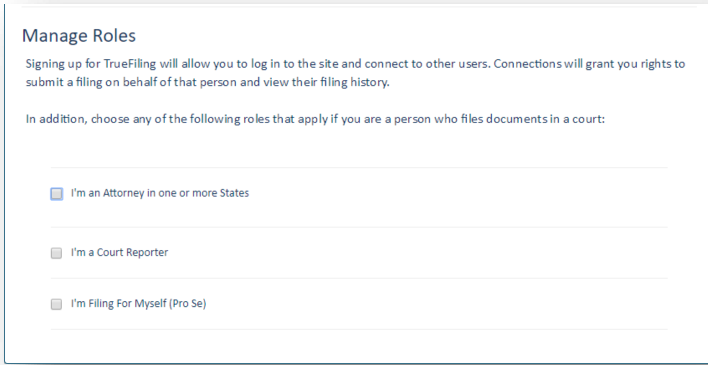
Your user role is associated with your login credentials and specifies how you'll submit filings to the court. Three roles are available - Attorney, Pro Se filer, or Court Reporter. You can select one role, multiple roles, or none.

If you don't select a user role, you can file only on another's behalf. That person must:

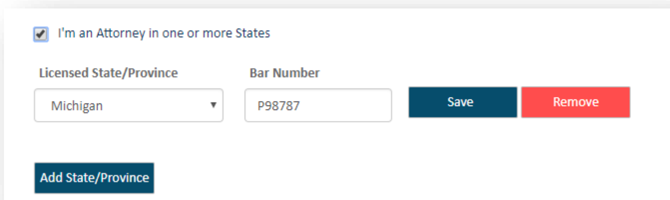
- Be a registered TrueFiling user, and
- Have an assigned user role, and
- Be one of your connections.

To change your role:

1. Click **Settings** under Main Pages in the navigation pane.
2. Expand the **My Information** pane.
3. In the Manage Roles section, select the appropriate role.



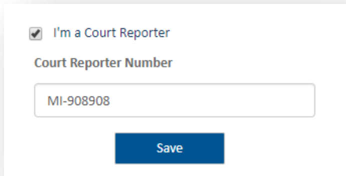
- If you select **I'm an Attorney in one or more States**:



a. Select your state or province from the **Licensed State/Province** field drop-down list.
b. Input the appropriate **Attorney** or **Bar Number** (maximum of 25 characters). Be sure this number is correct based on the location you selected in Step a.
c. Click **Save**.
d. If you're appropriately licensed and wish to register for other states or provinces, click the **Add State/Province** button.
e. Select the location and input your **Attorney** or **Bar Number**.
f. Click **Save**.

Click the **Remove** button to remove an entry.

- If you select **I'm a Court Reporter**:



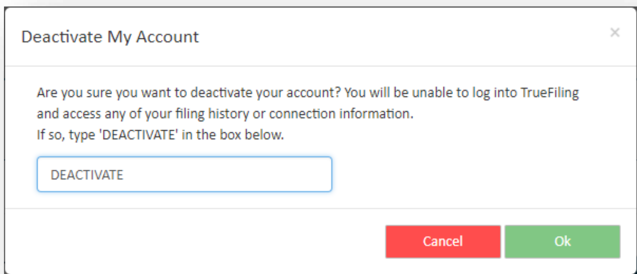
   a. Input your **Court Reporter Number**.
   b. Click **Save**.

- If you are representing yourself, select **I'm filing for myself (Pro Se)**.

Deactivate your Account

You can deactivate your TrueFiling account. If you choose to do so, you won't be able to log in to TrueFiling, nor will you be able to access your filing history, payment history, or your connection information.

1. Click **Settings** under Main Pages in the navigation pane.
2. Expand the **My Information** pane.
3. Click the **Deactivate Account** button.



4. Type **DEACTIVATE** (not case sensitive) in the confirmation dialog.
5. Click **OK** to confirm. You'll receive an email through which you'll finalize your account deactivation.
6. Open the email and click the **Deactivate Account** button.

   A dialog displays that indicates your account has been deactivated. You're prompted whether to remove your connections or keep them.

   IMPORTANT:

   If you remove your connections and subsequently reactivate your TrueFiling account, you'll need to issue connection invitations in order to re-establish those connections.

   ---

7. If you want your current connections to retain access to your filing and payment histories, click **No, keep my connections**.
8. Otherwise, click **Yes, remove connections**.

Upon confirmation, you will be automatically logged out of TrueFiling.

See Reactivate your Account for details on how to reactivate a deactivated account.

Reactivate your Account

To reactivate your account:

1. Access the TrueFiling log in page.
2. Enter your former login credentials (email and password). A message is displayed asking if you want to reactivate your account.
3. Click **Yes** to reactivate.

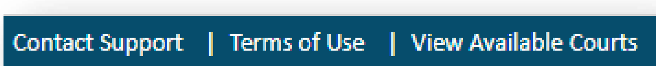
   You'll receive an email through which you'll reactivate your account.

4. Open the email and click the **Reactivate Account** button. The TrueFiling Password Reset page is displayed.
5. Input the password of your choosing. The password must contain:
   - At least one lower-case letter [a-z]
   - At least one upper-case letter [A-Z]
   - At least one numeral [0-9]
   - At least one symbol [!@#^&*()+_,{}?-]
   - A minimum of 8 characters
   - A maximum of 20 characters
6. Re-enter your password to confirm.
7. Click **Reset**. A message indicates your account has been reactivated.
8. Click the **Click here to Log In** link to log in to your TrueFiling account.

If you chose to keep your connections when you deactivated your account, those connections will still be valid when you reactivate your account.

View the License Agreement

To view the TrueFiling License Agreement, click the **Terms of Use** button in the lower-right corner.



Manage your Payment Accounts

When you submit your filings to the court, you'll select the payment account to use. This account is associated with a credit card that belongs to either you or one of your connections.

When you add a payment account, you can identify it as a shared account.

> A shared account can be used by any of your connections, and they can select it when they submit a filing. It's also visible to them on the Payment Accounts pane. However, only you (the user that created it) can edit or delete the account.
>
> **IMPORTANT:** If you select to share this account, you are responsible for all charges made on this account by members of your connection network.
>
> If you don't specify the account as shared, the account is for your use alone, and your connections can't access or use it.

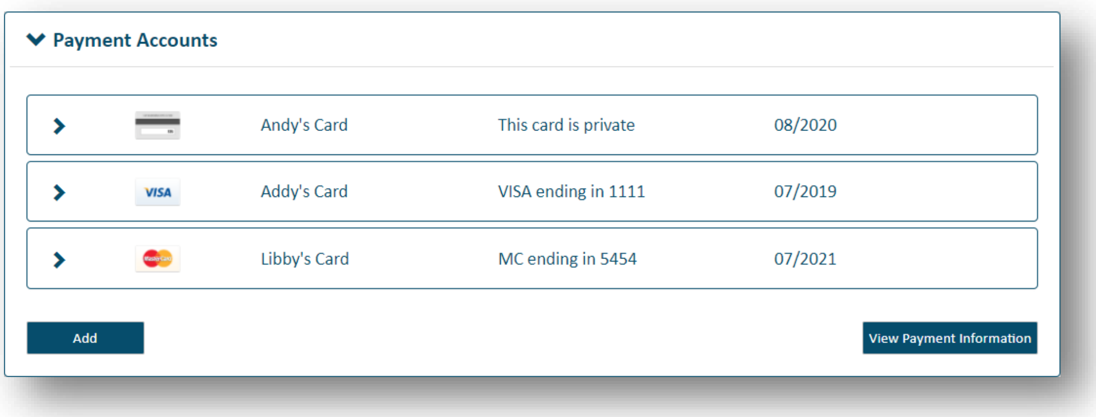
You can specify a default payment account. This account will be auto-selected when you submit your filing and check out. See Specify a Default Payment Account for details.

The court may allow you to request a fee waiver to waive the fees associated with the case. See Request a Fee Waiver earlier in this guide for details.

Add a New Payment Account

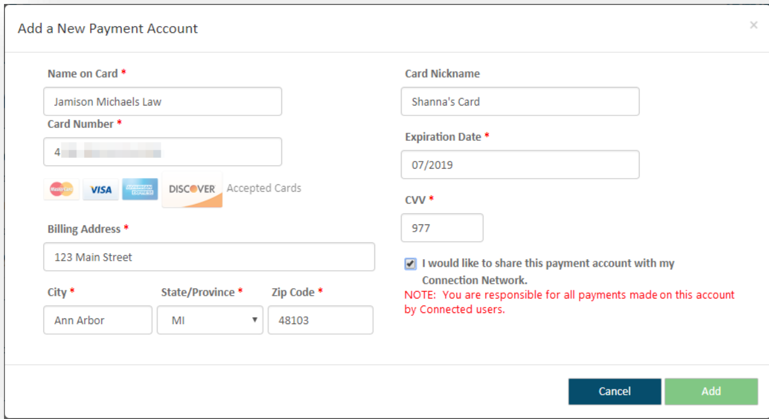
TrueFiling supports Visa, MasterCard, American Express, and Discover as valid payment account types.

1. Click **Settings** in the navigation pane.
2. On the Settings page, expand the **Payment Accounts** pane. Existing accounts are listed.



Expired cards are identified as such in the Payment Accounts pane and cannot be selected for payment when submitting your filings to the court.

3. Click **Add**.



4. Input the card holder's **Name** exactly as it appears on the card.
5. Input the **Card Number.**
6. Input the **Billing Address** information.
7. Input a **Nickname** for the card. This name will be displayed in the Available Payment Accounts pane on the Checkout dialog.
8. Input the card's **Expiration Date.**
9. Input the **CVV**.
10. Indicate if you want to share this account with your connection network. Don't select the checkbox if you want the account to be private.

IMPORTANT: If you select to share this account, you are responsible for all charges made on this account by members of your connection network.

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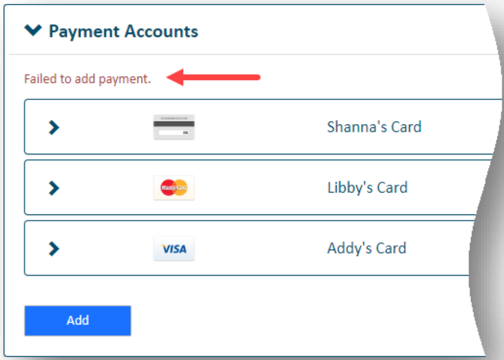
11. Click **Add**.

Once you've added the account, TrueFiling processes a nominal charge against the credit card to verify its validity. If the charge is successful, a refund request is immediately sent and processed to refund the charged amount.

You can identify this account as your default. See Specify a Default Payment Account for details.

The card will not be added, and this message will display on the Payment Accounts pane if you failed to input a valid card number with a valid expiration date:



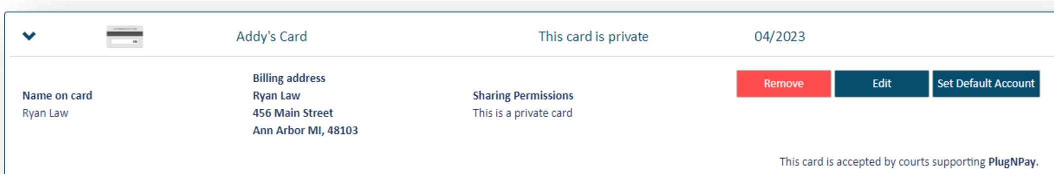
Click **Add** to add the card again and ensure all information is correctly formatted.

Specify a Default Payment Account

Instead of selecting a payment account each time you submit a bundle to the court, you can specify a default account that will be auto-selected on the Checkout dialog. This account can be either a private or shared account.

To identify a default payment account:

1. Click **Settings** in the navigation pane.
2. On the Settings page, expand the **Payment Accounts** pane.
3. Locate the account to identify as a default and click the **>**. The pane expands to list the account details.



4. Click the **Set Default Account** button. The button's label will then identify it as the Default Account.

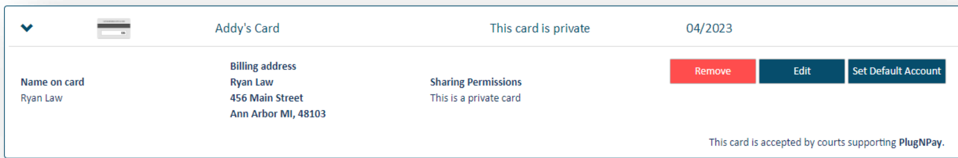
   Be aware that, if your default account is a shared account, and the connection that created the account makes it private, the account will no longer be available to you. As a result, you'll need to specify a different default account.

To remove this account as your default, click the **Default Account** button. The button's label will become **Set Default Account**, which indicates it can be selected as your default at a later time.

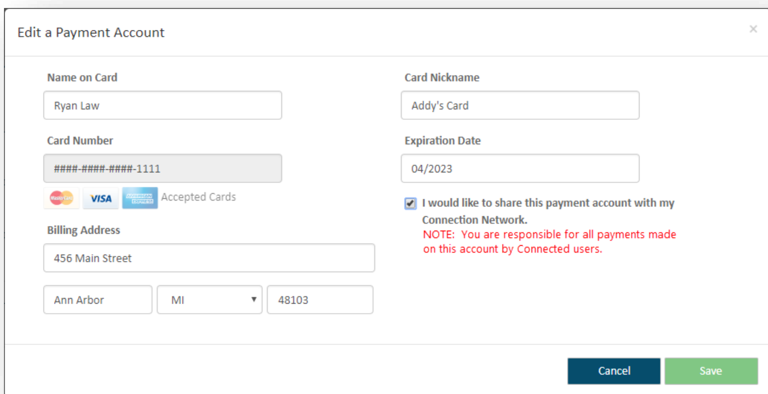
Edit a Payment Account

Only the TrueFiling user that created a payment account can edit it.

1. Click **Settings** in the navigation pane.
2. On the Settings page, expand the **Payment Accounts** pane.
3. Locate the account to edit and click the **>**. The pane expands to list the account details.



4. Click **Edit**.



The **Card Number** field is read-only and can't be changed. If you want to change this property, you must remove the account and add a new one with the correct credit card number. See Remove a Payment Account.

5. Make any required changes.

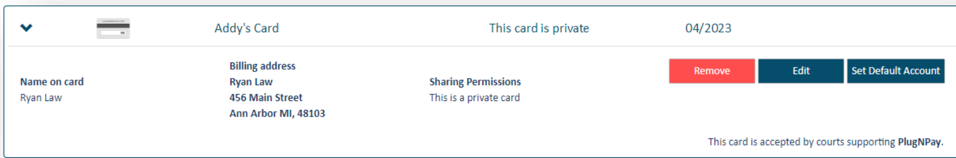
If you select to share this account, you are responsible for any charges made on this account by members of your connection network.

6. Click **Save**.

Remove a Payment Account

Only the TrueFiling user that created an account can remove it.

1. Click **Settings** in the navigation pane.
2. On the Settings page, expand the **Payment Accounts** pane.
3. Locate the account to delete and click the **>**. The pane expands to list the payment account details.



4. Click the **Remove** button.
5. Click **OK** to confirm the deletion.

When a shared payment account is deleted, any TrueFiling user that can access the account will receive an email notifying them that the payment account has been removed.

Account Help

Are you having trouble with your account? Review this information before you contact TrueFiling Support.

Having problems logging in?

If you're having trouble logging in to your TrueFiling account, review these possible causes.

You're using the wrong email address.

Make sure you're logging in using the email address you used when you registered for your TrueFiling account.

You're using the wrong password.

Be sure you're using your current password.
If you can't remember your password, you can request a password reset. On the Log In page, click the **Forgot Password** link to request a reset.

CAPS lock and / or NUM lock for your laptop or keyboard is ON.

Passwords are case-sensitive, so be sure you're not entering your password incorrectly due to the CAPS or NUM lock.
Also, if you copied and pasted your password from another source, be sure you didn't include extra spaces.

You haven't created your TrueFiling account yet.

It's possible you don't have a TrueFiling account. Try to sign up for an account.

a. On the Log In page, click **Sign Up** in the upper right corner. See Sign Up for TrueFiling for details.
b. On the Sign Up page, input your email address along with the other required information.
c. Click **Sign Up**.
d. If your email address is already associated with a TrueFiling account, a message will display to indicate this fact. If this occurs, you'll need to request a password reset. Click the **Forgot Password** link on the Log In page.

If your email address isn't associated with a TrueFiling account, your account will be created.

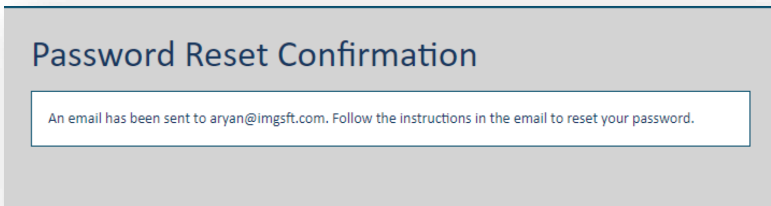
You've tried all the above, and you're still having trouble.

Contact our TrueFiling Support team. Select the **Contact Support** button on the lower-right corner.

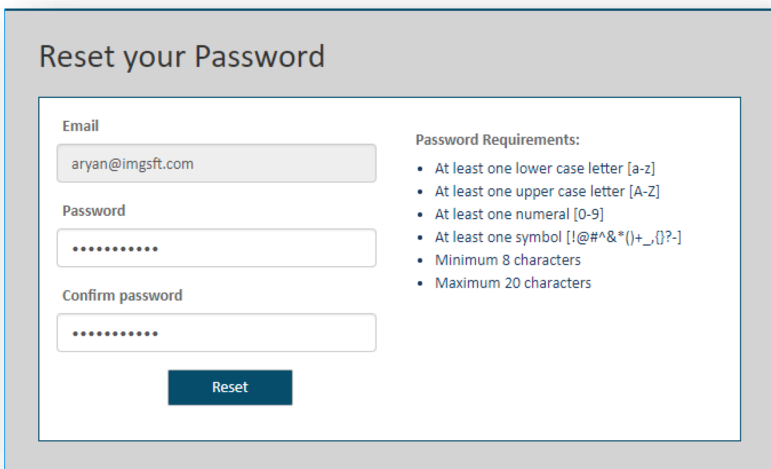
I Forgot my Password!

If you've forgotten your password, you can request a password reset.

1. On the Log In page, click the **Forgot password** link. The Forgot your Password page is displayed.
2. Input your **email address**.
3. Click **Submit**. A notification is displayed indicating a password reset email has been sent to the address you entered.



4. Open the email and click **Reset Password**. The Reset your Password dialog is displayed.



5. Input your new **Password**. The password must contain:
   - At least one lower-case letter [a-z]
   - At least one upper-case letter [A-Z]
   - At least one numeral [0-9]
   - At least one symbol [!@#^&*()+_,{}?-]
   - A minimum of 8 characters
   - A maximum of 20 characters

6. Confirm your new password.
7. Click **Reset**.

Once your password is reset, you're automatically logged in.

Are Emails from TrueFiling being Blocked?

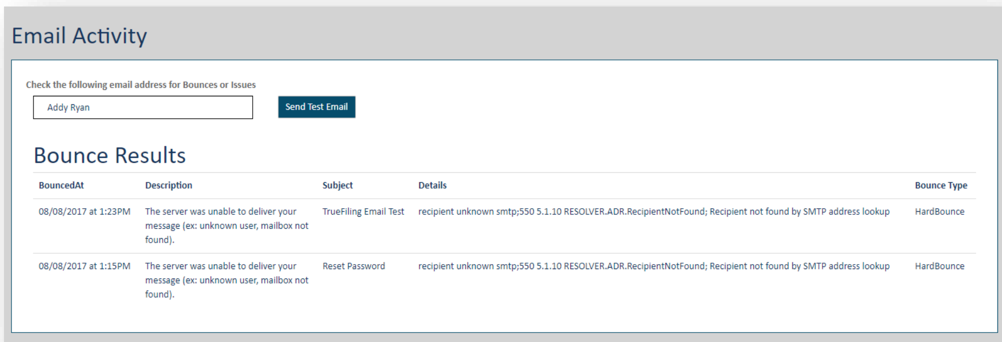
You can verify that your email server isn't blocking emails from TrueFiling.

1. In the navigation pane, under Resources, select **Email Activity**.
2. Click in the field. Your email address, along with those of your connections, will display.

   You can filter the list by entering an email address in the field. The address list is filtered as you type.

3. Select the appropriate address.

   TrueFiling will check for any email bounces associated with that address. Any bounce activity is displayed.



   To confirm the email address can receive emails from TrueFiling, click **Send Test Email**.

   TrueFiling will send an email message to the address specified. If your server isn't blocking emails from TrueFiling, you'll receive the message within a few minutes.

If your email server is blocking TrueFiling emails, contact TrueFiling Support to resolve the issue.

Answers to Common Filer Questions

Here are questions filers often ask. Select the question to display the answer.

What is the maximum file size allowed for an individual filing?

The maximum file size varies by court. There isn't a limit on the number of pages contained in a filing; however, there is a limit on the final size of the document.

What document file formats are accepted?

TrueFiling accepts filing documents in these formats:

- *Microsoft Word (DOC and DOCX)*
- *Adobe PDF (PDF)*
- *Plain text (TXT)*
- *Rich Text Format (RTF)*
- *Scanned images (TIFF, JPG, and PNG)*

What's the filing deadline for the court I'm filing in?

The filing deadline time is set by the court. To ensure you have the most accurate information, contact the court.

Can I cancel a filing that was submitted in error?

You must contact the court Clerk to cancel a submitted filing.

Can I eFile in all courts?

Each court determines what case types (for example criminal, civil, domestic) can be filed against in their jurisdiction using TrueFiling. Thus, not all courts will accept all case types.
To determine which case types are supported for eFiling in a given court, contact the court Clerk's office.

How do I contact the court?

*Click the **View Available Courts** link in the lower-right corner. A dialog listing participating courts is displayed, organized by state. Contact information for each court may be listed.*

Can I file on another's behalf?

Yes. You can file on behalf of any TrueFiling connection that has a specified user role. When you're creating your filing, select them as the filer.
See TrueFiling Connections and File to the Case for details.

When will the charges be made to my credit card?

Your payment account will be charged when you submit your filings to the court.

If payment is not accepted or my credit card is declined, do I need to file my documents again?

Yes, you'll need to update your credit card information and then resubmit your documents.
Refer to Add a New Payment Account or Edit a Payment Account for details.

If I mistakenly paid a filing fee or paid the fee twice, how do I get a refund?

All statutory fee refunds are handled directly by the court. You must contact the court and speak with a Clerk or Clerk Supervisor regarding these refunds.

Important Note: *If the court refunds a payment charged for a filing, the credit card service fee is not refunded.*

Can I use eService without filing a document with the court?

Yes. When you're preparing to upload your filing, you can choose to serve only, file only, or serve and file.

Do I have to generate a Proof of Service if I use eServicing?

No, if you eServe your filing documents, TrueFiling will automatically generate a Proof of Service and submit it to the court.

How do I mark my documents as Sealed / Confidential / Priority?

Once you've uploaded a filing, select the Edit button. A pane is displayed where you can specify a filing attribute. This feature is not available in all courts.
It's important to understand that assigning one or more of these attributes will NOT prevent TrueFiling from serving the document. ***It's your responsibility to ensure that sealed or proprietary information is served only to the appropriate parties.***
In some MiFILE courts, you can't serve sealed or confidential documents, but you can file them with the court.

What's a connected document?

A connected document is a separate filing associated with a filing. It functions as a "child" of the "parent" (primary) document. You'll upload a file and then connect it to the primary document.
Connected documents are permitted only if allowed by the court.
See Connect Documents.

What's a merged document?

In merged documents, one or more "child" filings are appended to a "parent" filing. You'll upload a file and then merge it with the primary document.
The result is one PDF file containing all the filings.
Merged documents are permitted only if allowed by the court.
See Merge Documents.

What's a Favorite case?

If you access a case frequently, you can specify it as a Favorite. You can launch the Case Details page quickly by selecting the Case Number on the Favorites page.
See Add or Remove a Case as a Favorite.

Contact Us

Still having trouble? We have a team of support specialists ready to help. You can contact us via email or phone. For both methods, be sure to have this information available.

- The court you're filing in
- The case number
- A detailed description of your question or issue

Phone Support FAQ

When you call Support, you'll initially hear a menu of frequently asked questions. Often, by selecting the appropriate option, your question can be answered.

If the self-directed FAQ doesn't answer your question, you can speak with a TrueFiling Support specialist.

To contact the TrueFiling Support Team:

Phone: (855) 959-8868
Email: support@truefiling.com

IMPORTANT
You should contact the court regarding legal or filing document questions such as:

What filing type should I choose?

Why hasn't my filing been filed yet?

Why was my filing rejected?

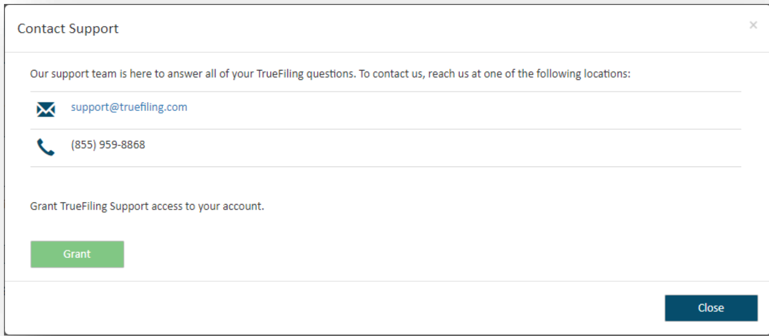
Grant Account Access to our Support Team

During a support call, you may be asked to allow a Technical Support Representative visibility to site details to assist with troubleshooting or to answer filer questions.

Once granted, access will last for 30 days.

1. To grant access, click **Contact Support** in the lower-right corner.

This dialog is displayed:



2. Click **Grant**.
3. Click **Close** to leave the dialog.

Granting access doesn't send a support request. You must still contact TrueFiling support.

Revoke Access Rights

1. To remove access rights at any time, click **Contact Support** in the lower-right corner.
2. Click **Revoke**.

The Support team's access to your account is removed.

Glossary

A

Accepted status: The filing is now ready for payment to be collected and is in queue for Clerk review. The filing is NOT yet part of the official case record.

Ad hoc service recipient: Recipient who will be served the submitted filing(s) on a one-time basis.

Attorney: A TrueFiling user role. A valid Attorney or Bar Number must be specified.

Attribute: Identifier assigned to a filing to indicate special circumstance - Priority, Confidential, Sealed.

Auto-servicing: Enables automatic Proof of Service generation for a filing to the court.

C

Case contact: An individual that can be selected for service in a case.

Case Details page: The Case Details page lists pertinent information about an existing case; specifically, case title/number/filer, case contacts, and the filings and their status with the court. In some courts, a request for case file documents can be submitted on this page. Any documents sent from the court can be subsequently downloaded.

Case file: All documents filed in a case.

Case search: Functionality used to locate a case in TrueFiling using the court, case number, or case title.

Clerk of the Court: The court officer who oversees administrative functions, especially managing the flow of cases through the court.

Connected document: A connected document is a separate filing associated with another filing. It functions as a "child" of the "parent" (primary) document. The filings are connected, yet still separate.

Connections: A network of firm attorneys, firm members, court reporters, and pro se filers. Connections can file on each other's behalf and can access each other's filing histories, payment histories, and any shared payment accounts.

Convenience fee: Fee charged based on the servicing type requested; each court determines the convenience fees to charge.

D

Default payment account: This payment account will be auto-selected during checkout.

Docket: A log that contains the complete history of each case in the form of brief chronological entries summarizing the court proceedings.

Document Type: A court filing category which may or may not include court fees.

E

eFile: Web-based service solution for court, law firm, and pro se filers.

Escrow payment account: If enabled through court configuration, this payment account is established between a TrueFiling user, ImageSoft, Inc., and the court. This type of account requires a special agreement between ImageSoft and the TrueFiling user and must be setup by contacting ImageSoft's TrueFiling support team. The account is funded upfront on a scheduled or as-needed basis. As long as the account remains funded, it will stay active. When the account is configured it will be available as a payment method during the checkout process similar to a credit card. Processing fees may be applied to payments made through an escrow account, depending on court configuration.

F

Favorite case: A frequently accessed case. You can quickly access the Case Details page by selecting the case on the Favorites page.

Fee waiver: A waiver granted by the court for fees associated with a case.

File: To place a document in the official custody of the court Clerk to enter into the files or records of a case.

File pane: The File pane is used to select the case to file against, specify whether to file and / or serve the document, and the filer.

Filed status: The filing has been accepted by the Clerk, and the filing IS now part of the official case record.

Filer: An individual filing a document through the eFiling system.

Filing attorney: The attorney responsible for the filing. This attorney's Attorney or Bar Number will be submitted with the filing to the court.

Filing fee: Fee charged based on the filing type of the submitted filing.

Filing history: Details on your filings; specifically, Properties, Service Recipients / Status, and Status Updates.

Filing properties: Court, case name, case title, fees, and filer information.

Filing status: The status of the filing with respect to the court; specifically, Submitted, In Progress, Accepted, Paid, Filed, Rejected, Not Filed, Payment Rejected, Refunded, Refund Attempted, Refund Failed.

Filing type: The type of filings in a case, which is used to determine the filing fee required.

H

History page: TrueFiling page that lists details of your filings and payment histories, as well as those of your connections.

I

In Progress status: The filing data has reached the court's filing review system. The filing is NOT yet part of the official case record.

Inter agency transfer payment account: If enabled through court configuration, this payment account enables payment between agencies with no funds being exchanged. The arrangement must be authorized and enabled by the court and setup by contacting ImageSoft's TrueFiling support team. When the account is configured, it will be available as a payment method during the checkout process similar to a credit card. Processing fees are not applied to payments made through an inter agency transfer account.

M

Maximum filing size: The maximum file size (in mB) that can be submitted to the court.

Merged documents: When merging documents, one or more "child" filings are combined with a "parent" (primary) filing. The result is one PDF file containing all the filings.

Miscellaneous: A document type that does not fall under any other filing type and is not associated with any fees.

N

Not Filed status: Final status of a filing that was served but not filed.

Notification settings: Settings used to specify when to receive text messages and/or email notifications regarding your filing's status, payment activities, and password changes.

O

Original copy: The document originally submitted to the court by the filer.

P

Paid status: Payment processing is complete. If the filing required payment, the specified payment account was charged, and a receipt is available. The filing is NOT yet part of the official case record.

Participant activity: A chronological listing of case contact additions or removals.

Payment account: Credit card to be charged for the current filing bundle.

Payment processor: A payment processor is a third-party organization that handles transactions for credit and debit cards. Each court uses the payment processor of their choice.

Payment Rejected status: Payment for the filing failed. Reasons can include an expired credit card, a closed account, insufficient funds, or the fact that the card was deleted from TrueFiling.

Primary document: The document uploaded for a filing that will be merged with or connected to another uploaded document.

Private payment account: A payment account available only to the user that created it.

Pro se filer: A self-represented filer.

Processing fee: Fee required to cover the credit card processing fee based on the statutory or other fees. Each court determines the processing fee associated with every filing based on the case type and filing type.

Proof of Service: A document delivered to the court that serves as proof a set of court documents was delivered to a party in a case.

R

Refund Attempted status: The court has requested a refund of the fee.

Refund Failed status: The fee refund requested by the court has failed.

Refunded status: A payment charged for the filing has been refunded. **Important:** If the court refunds a payment charged for a filing, the credit card service fee is non-refundable.

Register of Actions: A chronological list that details the date and description of each document filed in a case.

Registered user: An individual that has signed up for TrueFiling using their email address and a password of their choosing.

Rejected status: The filing has been rejected by the Clerk. The reason for rejection is listed.

Related filing: Multiple filings can be submitted to the court simultaneously. All such submitted documents are deemed related filings.

S

Service recipient: An individual that is served a case filing via email, mail delivery, or personal delivery. An email address is required for eService.

Service Recipient Status: The Service Recipient Status is part of a filing's history. It lists a filing's service recipients, if they've received the eServed document, and if they've downloaded the document.

Service Recipients pane: The Service Recipients pane is displayed if the filer selects to serve their filing. The pane lists all case contacts and enables the filer to select those contacts for service and to specify the service type. Ad hoc (one time) recipients, as well as connections and other counsel (if allowed by the court) can be added as recipients.

Servicing: The process of delivering court documents to a case's parties of interest.

Shared payment account: A shared account can be used by any of your connections. The card can be edited or deleted only by the user that created it. IMPORTANT: If you select to share this account, you are responsible for all charges made on this account by members of your connection network.

Stamped copy: A copy of the document submitted to the court that has been Received, Rejected, and/or Filed and is stamped as such.

Standard case contact: A contact added to a case that does NOT meet **at least one** of these criteria:

They have filed to the case, and the filing has been accepted and marked as Filed by the court.

They have been added as a party to a case in the court's Case Management System (CMS), and that information has been integrated with TrueFiling.

They have been accepted by the court Clerk as a Verified contact.

Submitted: The filing data was submitted by the filer to the system for the Clerk to review. The filing is NOT yet part of the official case record.

Support specialist: TrueFiling team member trained to assist filers in eService and eFiling.

U

Unsubmitted: Status assigned to a filing that has not yet been submitted to the court. Filings with this status can be edited. The court has no knowledge of filings in this state.

Upload pane: The Upload pane is used to upload filing documents that will be submitted to the court.

User role: A user role identifies how you'll submit filings to the court - Attorney, Pro Se filer, or Court Reporter. A role must be specified if you plan to file on your own behalf.

V

Verified case contact: A contact added to a case that meets one of these criteria:

They have filed to the case, and the filing has been accepted and marked as Filed by the court.

They have been added as a party to a case in the court's Case Management System (CMS), and that information has been integrated with TrueFiling.

They have been accepted by the court Clerk as a Verified contact.

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