TYBERA

eFlex Electronic Filing – Filer Interface

Franklin County Ohio

User's Guide for Filers

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Introducing e-Filing

e-Filing Basics

Franklin County's e-Filing system is designed to make the work associated with initiating and processing a case more efficient for both filers and court personnel. The web-based filer interface part of the software allows attorneys, registered filers (Pro Se), law enforcement, government agencies, and others to create documents and submit them to the court electronically. The filer interface also provides the means for users to view case histories, check the status of submissions, send follow up documents, and access service lists.

For the court personnel, the software routes the filings to the appropriate personnel for review, response, generation of additional documents, or further action. For most integrations, when documents are filed in hard copy, once the court personnel scan the documents, the filer interface distributes a courtesy notice to electronic participants on the case so those participants may access the documents electronically.

This user's guide is intended to instruct filers on the features of the eFlex system. In addition to this manual, Franklin County has video tutorials outlining step-by-step procedures for some of the features of the filer interface. You may access those tutorials from the Franklin County Court Login Page or the Tybera website.

Document Preparation Prior to Login

For most types of cases, the filer will need to attach documents with the initial filing. For the most part, those documents and any additional documents that are submitted at a later time need to be submitted as an Adobe® Acrobat® PDF file (Portable Document Format). There are some documents, such as proposed orders, that are exceptions to this rule and may be submitted as Microsoft® Word 2003 or higher or Corel WordPerfect® 10 or higher files. It is best to be prepared before logging into Franklin County Courts' filer interface.

The requirement for submitting documents in PDF files also applies to paper exhibits such as copies of contracts or copies of cancelled checks. Such paper exhibits must be scanned and saved as a PDF or as a TIFF. Because color scans add to the file size, it is highly recommended that black and white settings be used with a lower resolution setting of 300 dpi (dots per inch) when scanning paper exhibits unless the loss of the color degrades the value of the evidence.

If you need instruction on creating a PDF file, please refer to Appendix A at the end of this user guide.

Note: Individual document size is limited to 5 MB. Multiple documents can be included in a single submission. The size limitation for an entire submission is 30 MB. If the document is larger than the 5 MB limit, it will be necessary to split the document into a set of smaller files. When the large documents are split into parts, it is helpful to save the individual parts with file names such as "Part 2 of Motion," "Part 3 of Motion," etc. Preparing large documents in this manner prior to beginning the case initiation will save time.

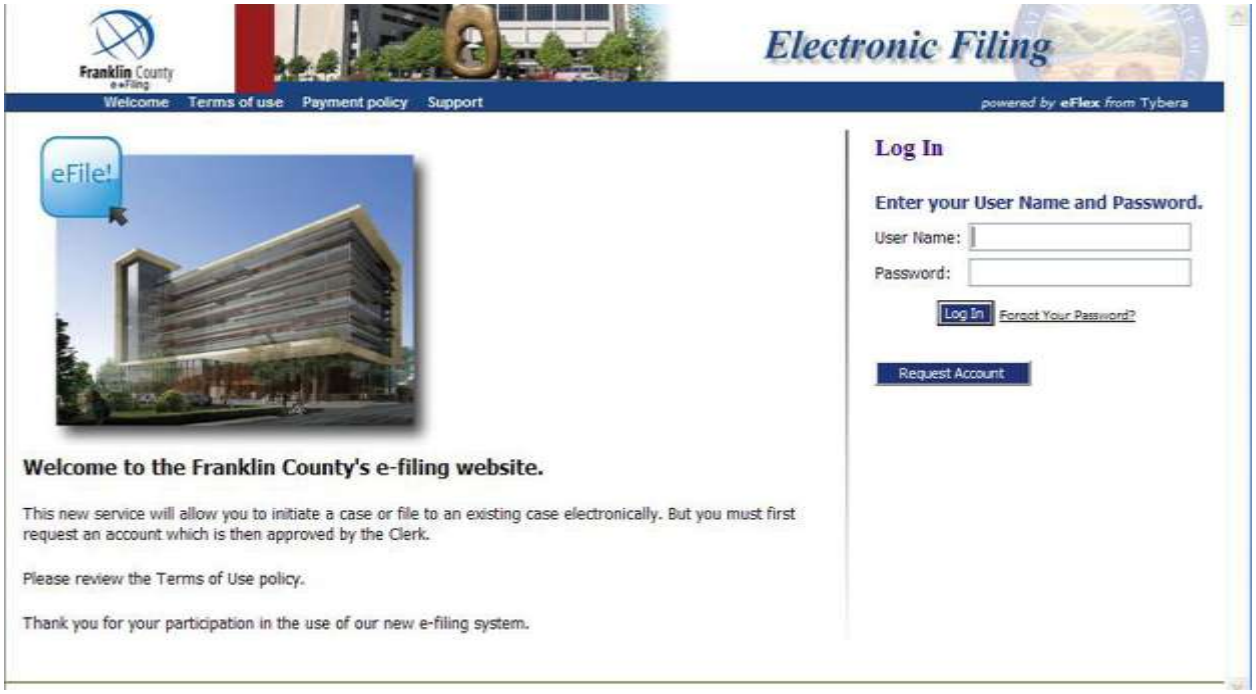
Getting Started

Login

To begin e-Filing you must first go to the "Login" page located at: https://e-Filing.franklincountyohio.gov and request an account if you do not already have one.

The "Login" page is the place where, periodically, the system administrator may communicate with filers by posting a message providing links to rules or forms or by posting a message notifying users of upcoming system maintenance that will make the system unavailable for a set time period.

Figure 1: Login Screen



1. To begin the registration process, click on the **Request Account** button on the login page. The "User Agreement" page will open.

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Figure 2: Read and Accept User Agreement

2. After reading the user agreement, accept the terms by selecting the proper radio button, and click **Submit**. The "User Roles" page will appear.

3. Select the appropriate user role by clicking in the proper radio button.

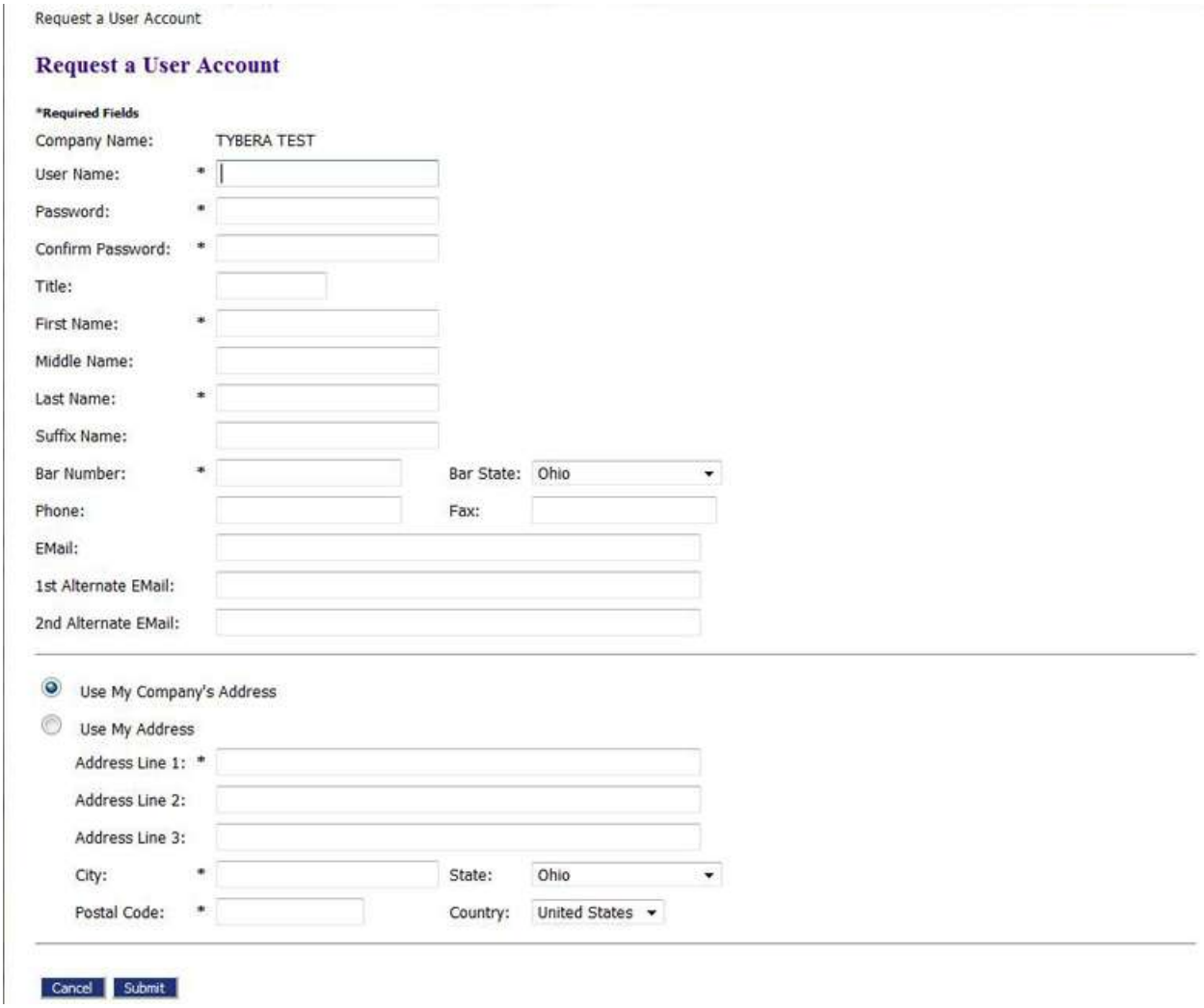
4. Click **Next**. The "Select a Company" page will open.

Figure 3: Association with an Organization

5. Each user must be associated with an organization. On the "Select a Company" page, use the drop-down menu to select a company that is already a part of the eFlex community. Alternately, to create a new organization account, select "New" and fill in the textbox with the company name for which an account is being established. Make sure you use the legal name of the company.

6. Click **Submit**. The "Request a User Account" page will display.

Figure 4: User Profile Information



7. Fill in the textboxes with the appropriate information. Fields marked with an asterisk are required.

Note: Some information, such as your user name and your supreme court number (or bar number if you are an out-of-state attorney), cannot be modified after you register.

8. Click **Submit**. A page notifying you that a user account has been requested appears and displays basic user information including the company with which the user is associated.

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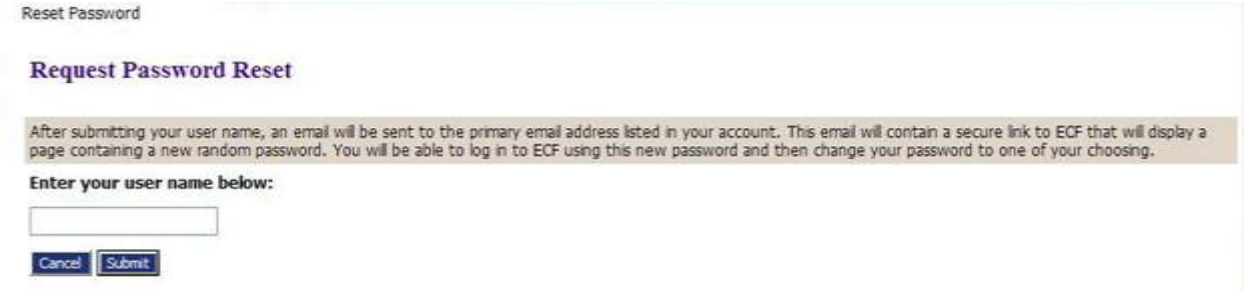
Figure 5: Notification of User Account Request

9. Click **OK** to be returned to the "Login" page. Once you have completed the registration process and your account has been approved, you will receive an email message that your account is approved. You can then log in to the e-Filing system with your username and the password you established during the registration process.

Resetting Forgotten Password

1. If you have forgotten your password, on the "Login" page, click **Forgot Your Password**. The "Request Password Reset" page will appear.

Figure 6: Requesting a Password Reset



2. Enter your user name and click **Submit**. An email containing a link will be sent to the account listed on your user profile.

3. Upon clicking the link, you will be directed to a page with a temporary password that you may use to login to the eFlex system.

Figure 7: Temporary Password for One-Time Login

4. After login, proceed to the "Change Password" page. You may also access this page by selecting **My Profiles > Change Password** from the menu bar located at the top of most pages.

Figure 8: Changing a Password

5. Enter the temporary password in the "Password" field.
6. Create a new password following the password requirements and type it into the "New Password" field.
7. In the "Confirm New Password" field, re-type the password exactly as you entered it in step 6.
8. Click **Submit** to save your changes.
9. Be sure you notify your legal assistant, or any others who may enter your filings for you, of the change in password.

Navigating from the Home Page

The "Home Page" is your starting point as a filer and is the default screen you see when you login. All the basic filer functions are accessed by clicking the appropriate button listed on the home page. You can also navigate using the menu bar that appears at the top of most pages on the website. Roll the mouse over the listings on the menu bar to become familiar with options not available in the list of buttons at the left of the page. For instance, on the menu bar the "My Profile" drop down list allows you to access pages to view and modify profile information, including changing your password.

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Figure 9: Home Page

Your username appears on the right side below the banner.

Note: This is a web application. Your web session will terminate automatically if there is no activity on the webpage for 20 minutes. A session is considered active as long as you are interacting with the web server. For example, if you do not click a **Submit, Next, or Save** button within 20 minutes, the session will time out and log you off the system. When the system logs you out, the screen doesn't change. It appears that you're still logged on; however, as soon as you click a button, you will be asked to login. Typing in a text field does not count as being "active."

Logging Out

1. Click the **Logout** button listed on the right side of the menu bar. A "Logout" page will appear.

Figure 10: Notification of Drafts

Filing ID	Client #	Court Case #	Case Title	Filing Description	▼Create Date
1970				Other Civil	04-22-2011:01:52:17 P
1917		11CV000703	PRIMARY PLAINTIFF -VS- PRIMARY DEFENDANT ET AL	Other Civil	04-20-2011:05:00:08 P
1849		600123A	BONES, BECKY	Improve Real Estate	04-18-2011:05:43:26 P
1838				Executions	04-18-2011:02:39:40 P
1727		11CV000706		Foreclosures	04-13-2011:02:14:05 P
1709		11CV000570	BUGGS BUNNY -VS- DAFFY DUCK	Foreclosures	04-12-2011:07:43:45 P
1708		10CV000285	AMERICAN FAMILY INSURANCE COMPANY -VS- DUSTIN WORTHINGTON	Personal Injury (Other Torts)	04-12-2011:07:43:04 P
1690	asdf			Executions	04-11-2011:10:17:23 P
1618		11CV000570	BUGGS BUNNY -VS- DAFFY DUCK	Foreclosures	04-09-2011:09:20:18 P
1617		485246B	VON JASINSKI, LORETTA JANE	Land Sale	04-08-2011:07:06:24 P
1502		485246B	VON JASINSKI, LORETTA JANE	Land Sale	04-06-2011:01:56:48 P
1498		485246B	VON JASINSKI, LORETTA JANE	Land Sale	04-06-2011:01:04:57 P
1497		11CV000338	COLE WOOD -VS- CALHOUN WOOD	Foreclosures	04-06-2011:12:57:43 P
1306		10CV000100	CHASE HOME FINANCE LLC -VS- PRASHANT D MATHUR	Other Civil	03-29-2011:05:03:24 P
1178		11CV000248	FRED PLAINTIFF -VS- FRANK DEFENDANT	Foreclosures	03-25-2011:01:39:47 P
1168		11CV000544	JOE JONES -VS- FRED FREDS	Foreclosures	03-25-2011:12:17:51 P
1150		11CV000544	JOE JONES -VS- FRED FREDS	Foreclosures	03-24-2011:12:06:45 P
1081		11CV000248	FRED PLAINTIFF -VS- FRANK DEFENDANT	Foreclosures	03-22-2011:09:41:19 P
1080				Certificate of Judgment from a Common Pleas Judgment	03-22-2011:08:38:31 P

2. Review the list of incomplete filings. Prior to completing user logout, the eFlex system notifies users of drafts he or she may still have in process. Because eFlex saves information entered for a filing after the addition of parties or documents, a user is able to begin a filing and leave the eFlex session before finalizing the filing. The eFlex system also automatically executes a save action on incomplete filings when a user selects **Logout**. The information entered will be saved in draft form and accessible for completion on subsequent logins.

Working with Profiles

My User Profile

When you register for an account, you are required to provide profile information, which can be edited or updated later as needed.

To view or edit your user profile:

1. Select **My Profile** > **My Profile** from the menu. The "User Profile" page will appear and display the information entered when the user account was created or modified.

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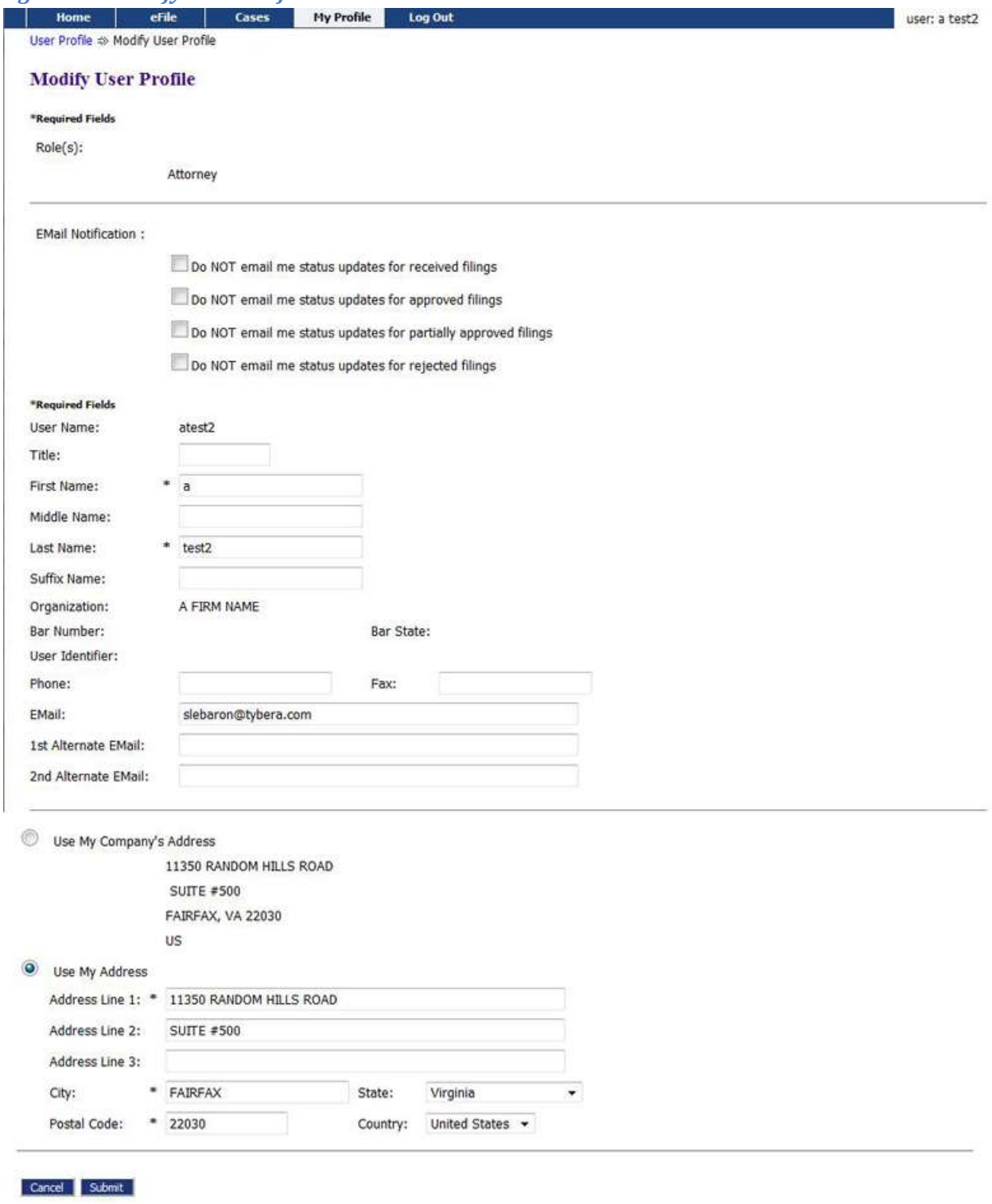
Figure 12: Modify User Profile



2. To change the information in the user profile, click **Modify User Profile** to cause the "Modify User Profile" page to appear. Fields that display a textbox may be modified.

3. **Optional:** If you do not include an email address in your profile, you will not receive notifications through email. The alternative email addresses are provided so that someone else can receive email notices when you receive courtesy notices on your cases. This may be used for partners or assistants.

4. **Optional:** The eFlex system default is to automatically send users emails notifying them of status updates for action taken on their filings. If you do not wish to receive email updates on status changes for received filings, approved filings, partially approved filings, or rejected filings on all of your cases, select the appropriate radio button to discontinue that service.

5. Click **Submit** to save the changes you have made and be returned to the "User Profile" page.

Note: If modification needs to be made to fields without a textbox, the user will need to contact the system administrator. For instance, a system administrator is able to change a user's assigned role or the organization with which the user is associated.

Passwords

You may change your password whenever you want. Periodically changing your account password is a wise security measure. We recommend that your password be something that you can remember but is difficult for others to figure out. A good password has symbols, upper and lower case characters, numbers, and is greater than 4 digits. Passwords are case sensitive.

To change your password:

1. Select **My Profile** > **Change Password** from the menu bar at the top of the page or, from the "User Profile" page, click **Change Password**.

Figure 13: Change Password Screen

2. Enter the temporary password in the "Password" field.

3. Create a new password following the password requirements and type it into the "New Password" field.

4. In the "Confirm New Password" field, re-type the password exactly as you entered it in step 3.

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5. Click **Submit** to save your changes and view the "User Profile" page.

6. Be sure you notify your legal assistant, or any others who may enter your filings for you, of the change in password.

Note: When you are changing your password using the "Forgot My Password" feature on the log-in page make sure you type in the new temporary password in the first password field. Don't try to remember your old password because it has been changed.

Login History

The "Login History" screen shows your login failures to help you monitor any unauthorized login attempts.

If your account has too many login failures, the system will automatically suspend your account. If this occurs, call support to reset your password. Changing your password on a regular basis is one way to help avoid unauthorized access to your account.

To view login history:

1. Select **My Profile** > **View Login History** from the menu. The "Login History" page appears displaying a list of the login attempts along with the date, login result, and IP address of the requesting machine.

Figure 14: Login History

2. Use the menu bar at the top of the page to navigate to your next task.

Working with Cases

There are three options under the menu bar option labeled "Cases". They are:

- "My Cases"

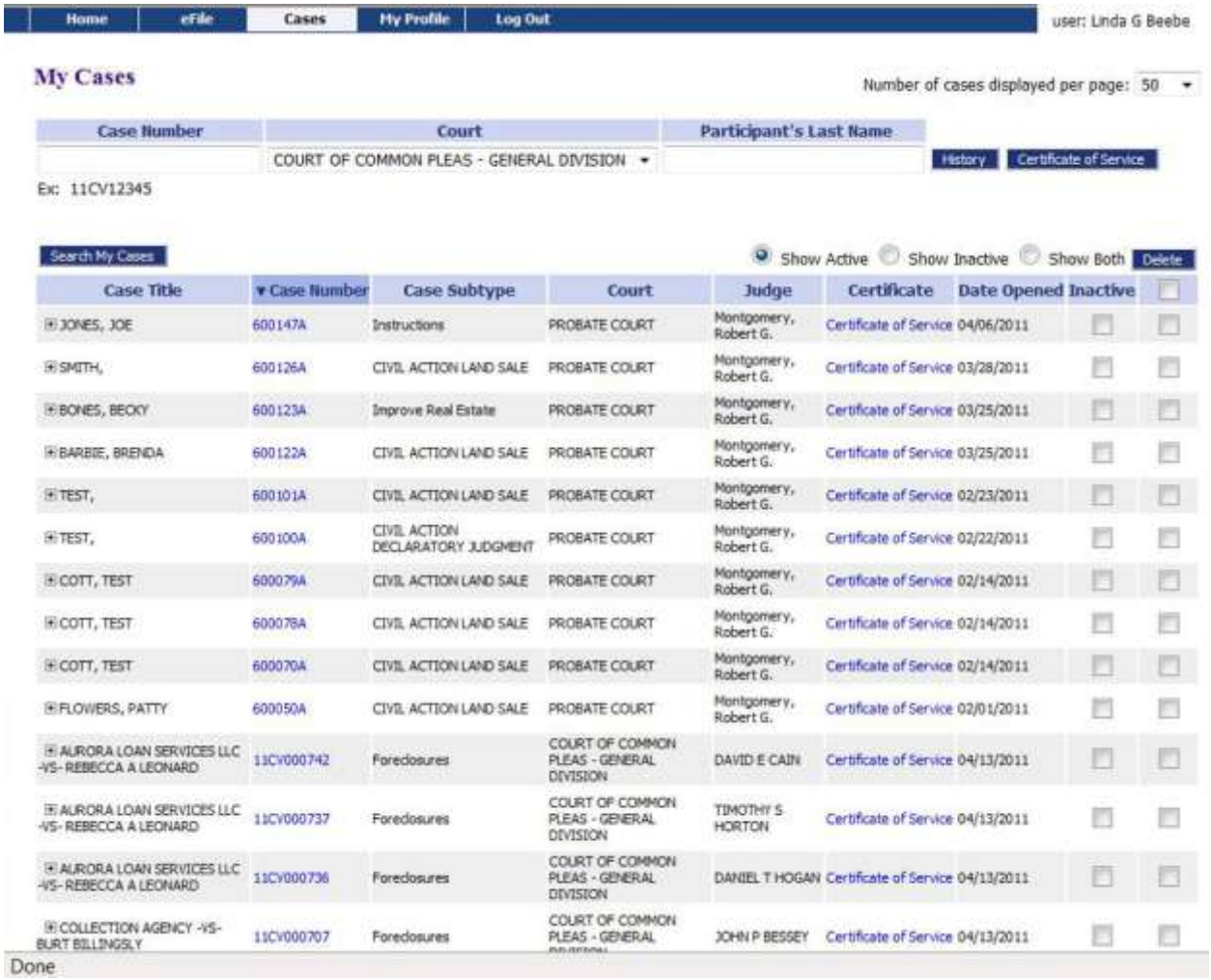
- "Notifications"
- "Filing Charges"

When you initiate a new case or send in a follow-up filing, even if it is just a notification, the case number is added to the "My Cases" list if you are a participant, and the e-Filing system recognizes that condition. From the menu bar, clicking on **My Cases** will allow you to access a list of cases on which you are a registered participant.

To View My Cases:

Click **My Recent Cases** on the home page or select **Cases** > **My Cases** from the menu bar.

Figure 15: List of "My Cases"



From here you can:

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- View any case history of non-confidential cases that have been initiated electronically by entering a case number, court, and participant's last name (if probate court, the last name used in the case title), then clicking **History**.
- View a case history by clicking the case number.
- Filter cases by active, inactive, or both.
- View case documents by clicking the plus "+" sign next to the "Case Title."
- Search for cases by clicking **Search My Cases** and entering search criteria.

Attorneys: As a licensed attorney you may see cases listed here that you have not e-Filed on. If you are indexed by the clerk as an attorney representing a party on a case, the e-Filing system will update your list as soon as anyone on the case submits something through the e-Filing system on that case.

Pro Se Filers: If you are a Registered Filer, cases you are currently participating in may not automatically show on your list. The reason for this may be that you haven't associated your e-Filing account to your cases. You must submit a "Notice of Case Association" document on each case to have the case show on this list.

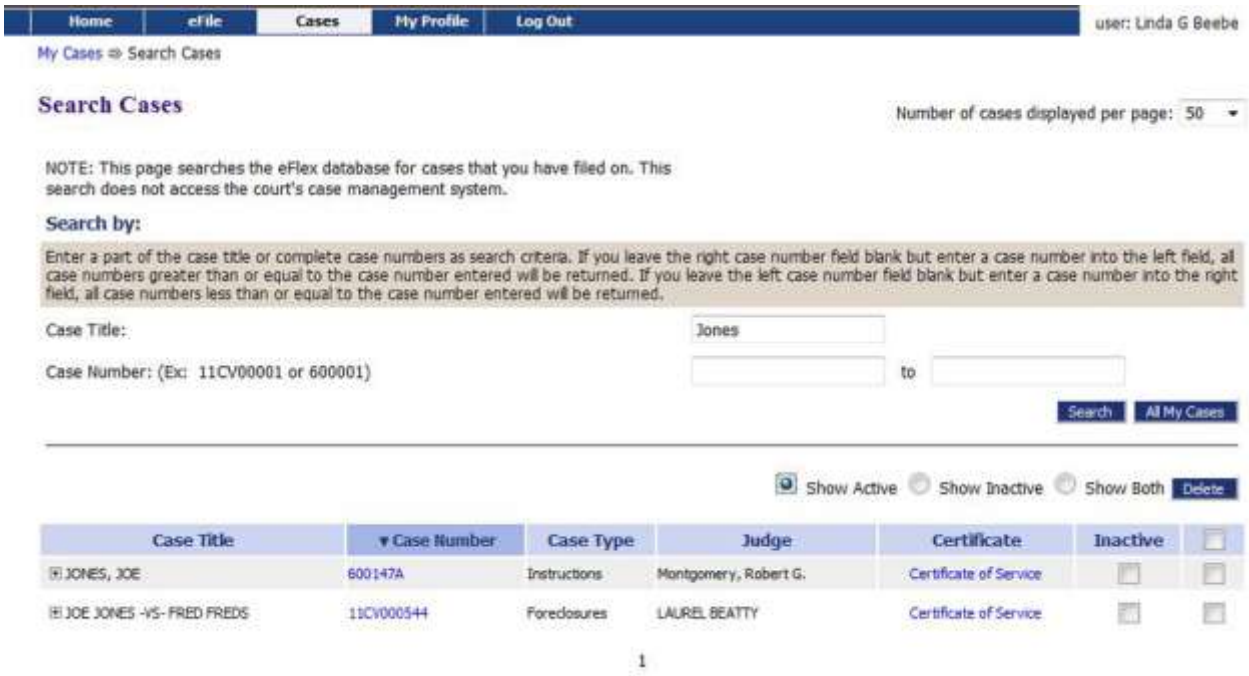
1. Limit or expand the number of cases listed by clicking on the "Number of Cases Displayed Per Page" drop-down menu in the upper right corner of the page.
2. **Optional:** Search for cases not listed by filling in the case number, court, and the case title in the search boxes at the top of the page and then clicking either **History** or **Certificate of Service**. This feature is helpful if you have not e-Filed on a case but need to view the case history or review the list of participants that need service in paper.
3. The "Show Active," "Show Inactive," and "Show Both" radio buttons at the right side above the list of cases is another means of filtering what is displayed on the page. The system default is "Show Active."
4. Filter the cases listed by selecting the "Inactive" checkbox to the right of a case on which there is no current activity. The default setting for the "My Cases" page is "Show Active" so cases flagged as "Inactive" will not be displayed on the "My Cases" list.

Note: If action is taken on a case you have marked as "Inactive," you will receive notifications of that action and can then reset the flag to active so the case will display on your "My Cases" list.

5. To reset a case as "Active," select the **Show Inactive** radio button on the right side above the list. When the inactive cases appear on the page, un-check the "Inactive" checkbox for the entry that has become active. The entry will be reset to "Active" and will display on your "My Cases" active list.

6. **Optional:** Click the **Search My Cases** button to be directed to a page where you can search the eFlex system for case on which you have filed. The search does not access the CMS. Enter part of the title or case number information as requested, and click **Search**. Cases fitting the criteria will be displayed on the "Search Cases" page.

Figure 16: Search Cases



7. **Optional:** Access additional information about the cases listed on the page by clicking on the "Case Number" link to view the "Case History" or on the "Certificate" link to view the lists of both electronic participants and the list of participants who will need notifications in paper.

To Delete a Case from My Cases Page

If you have cases listed and you do not want them on your list because you are no longer a participant on the case, because the case is dismissed, or for some other reason, you can delete cases from your "My Cases" list.

1. Click **My Recent Cases** on the home page or select **Cases** > **My Cases** from the menu bar.

2. Filter the list of cases displayed by using the drop-down menu at the upper right or by using the "Show Active" and "Show Inactive" radio buttons above the list of cases.

3. Find the case or cases you would like to delete from this view. Click the checkbox to the far right of the listing. Be sure you are selecting the checkbox in the "Delete" column.

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4. Click the **Delete** button. You will be prompted with the following: "If you delete cases, you will no longer receive case notifications, and it will no longer be listed in your 'My Cases' list."

Note: The cases you delete are still on the court server, but they are not in your eFlex account. They can be re-added to your "My Cases" list later if new activity occurs and you are a participant on the case at that time. This will occur if you e-File something or if you get a notification on that case. Also, searching for a case history will add the case back to your "My Cases" list.

Viewing Case History

1. From the "My Cases" page, click either the "Case Number" link or use the textboxes to enter the case number, court, and case title, and click **History**. A secondary page will open. The "Case History" view will vary depending on the type of case it is.

Figure 17: Case History View of Probate Case

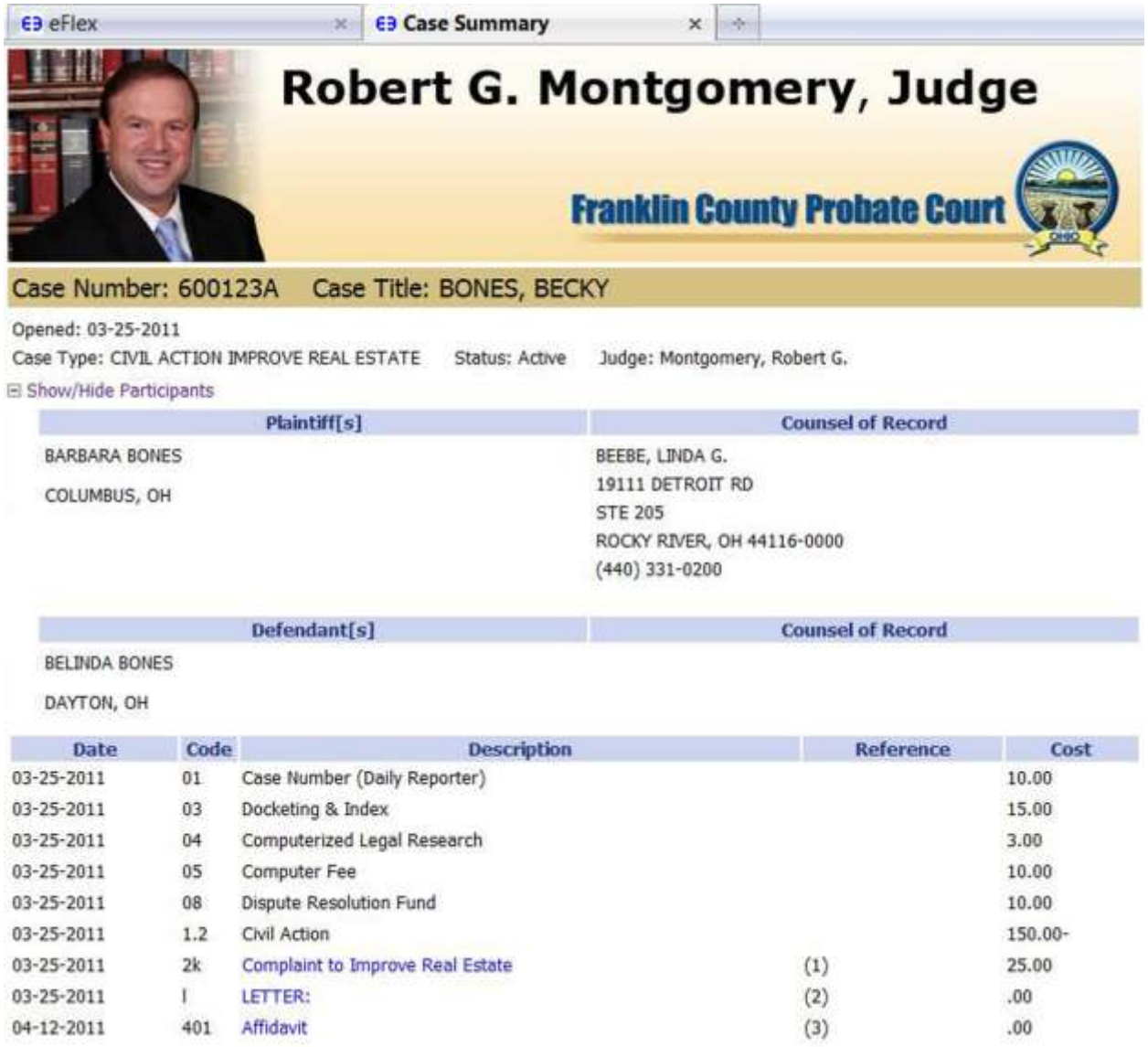

Figure 18: Case History View of Court of Common Pleas

2. Click the **+/-** near the upper left corner of the page to show or hide participants such as plaintiffs, defendants, or attorneys listed on the case.

3. Click the **+/-** to the left of the "Case History" column entry to view additional information.

4. Click a link under the "Case History" column to download that particular document. Your ability to access the documents will depend on the case type and security level.

Viewing Certificate of Service

1. From the "My Cases" page, click either the "Certificate" link or use the textboxes to enter the case number, court, and case title, and click **Certificate of Service**. A secondary page will open.

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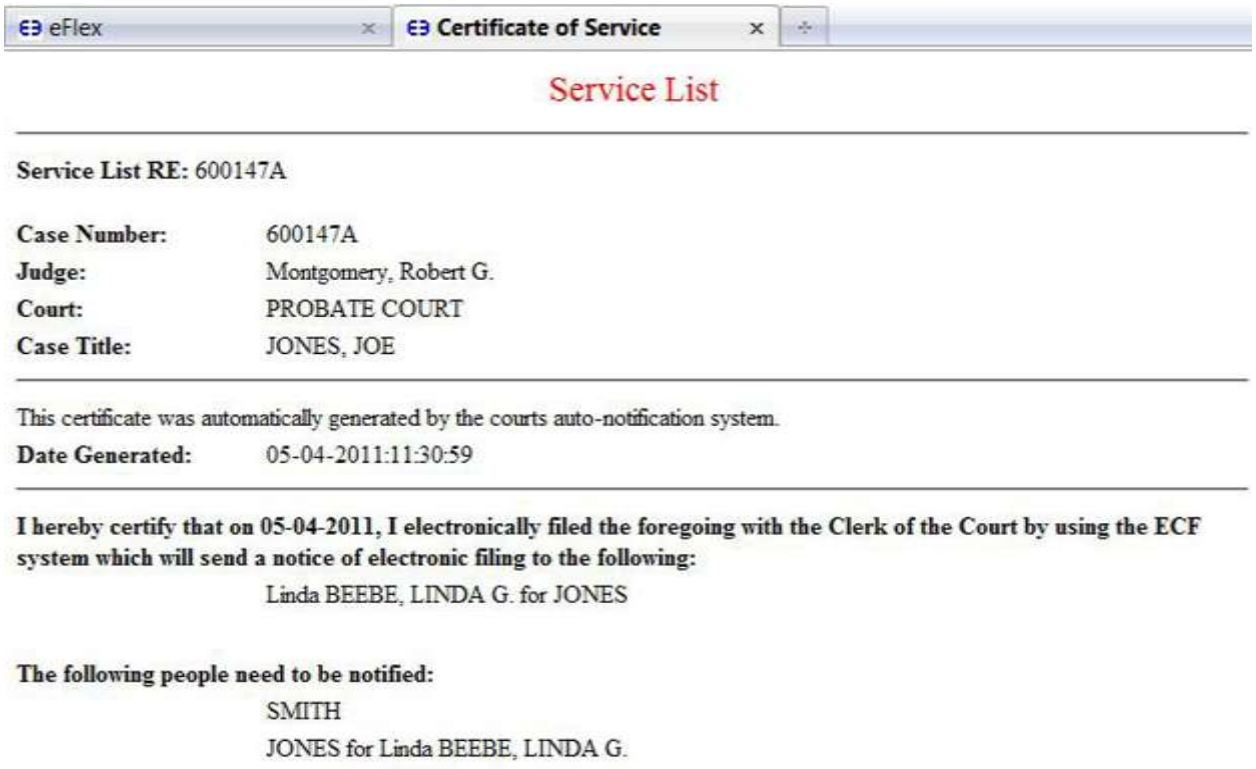
Figure 19: Service List


eFlex | Certificate of Service

Service List

Service List RE: 600147A

Case Number:	600147A
Judge:	Montgomery, Robert G.
Court:	PROBATE COURT
Case Title:	JONES, JOE

This certificate was automatically generated by the courts auto-notification system.
Date Generated: 05-04-2011:11:30:59

I hereby certify that on 05-04-2011, I electronically filed the foregoing with the Clerk of the Court by using the ECF system which will send a notice of electronic filing to the following:
Linda BEEBE, LINDA G. for JONES

The following people need to be notified:
SMITH
JONES for Linda BEEBE, LINDA G.

2. The "Service List" view will list the electronic participants first. Those participants who need to be notified in paper will be under the heading "The following people need to be notified."

Notifications

As part of your original account registration, you provided an email address and were given the opportunity to include additional email addresses. The eFlex system automatically generates emails to communicate with participants when action is taken on their cases. All email addresses entered in your profile will receive email messages of both types of notifications generated by the system. The email does not include the documents or all the details of the submissions. The official notice is accessed through the filer interface. The email tells you there is a notice waiting for you to access.

The two types of notifications that can show in your notification list are:

- "Notice of Electronic Filing" (NEF)
- "Courtesy Notifications"

A "Notice of Electronic Filing" (NEF) is a notice of documents that are filed on a case electronically. For participants on the case that do not have an e-Filing account, the Franklin County Courts require that you continue the practice of service to those participants in paper and include your certificate of service as part of your documents in this case.

When you receive a "Courtesy Notification" this means a paper document was submitted to the court, and the clerk scanned the documents into electronic format to be recorded. Links to these scanned

documents are included in the courtesy notification. You should have received a paper copy of these documents from the filer if they submitted their documents in paper; however, many Pro Se filers do not understand the rules of service and fail to distribute the service properly. The courtesy notifications help the filers know when this occurs, or the courtesy notification may simply be faster than the time it takes to receive the service in the mail.

Once you have e-Filed on a case and been added as a party to that case by the clerk of court, the case number is stored in a database, and your username is associated with that case. When someone else sends a follow-up submission on any case on which you have been indexed as a participant, you will receive an email and the notification list will be updated with the submission information.

Notifications generally go out when the court records a submission. Notifications are also sent when the submission is accepted or "Returned Not Filed" by the clerk.

Accessing Your Notifications

1. To access your notifications from within the email, you can click on the link embedded in the email. This will launch a web browser and take you to the "Login" page. Once you log in, you will be transferred to the "Notification Listing." (If you already have the e-Filing application open, it is not recommended to open a new session by logging into a different browser window.)

Note: If for some reason you do not get your email messages, you can still log in and view your notifications. The e-Filing system holds all notifications, access to the details of the notifications, and the ability to download the documents.

2. To access your notifications from the "Home" page, you can click on the **Notifications** button. Next to the **Notifications** button on the "Home" page may be a number in parentheses such as (**10**). This number represents the number of notifications you have not accessed yet and does not include the notifications that you have already accessed.

3. You can also access your notifications from the menu bar **e-File > Notifications.**

Note: These notifications are not permanent. They are deleted after a period of time determined by the court. Currently, that time limit is 90 days, but it can change. For more information about your responsibilities for notification in paper, please refer to the Court Rules.

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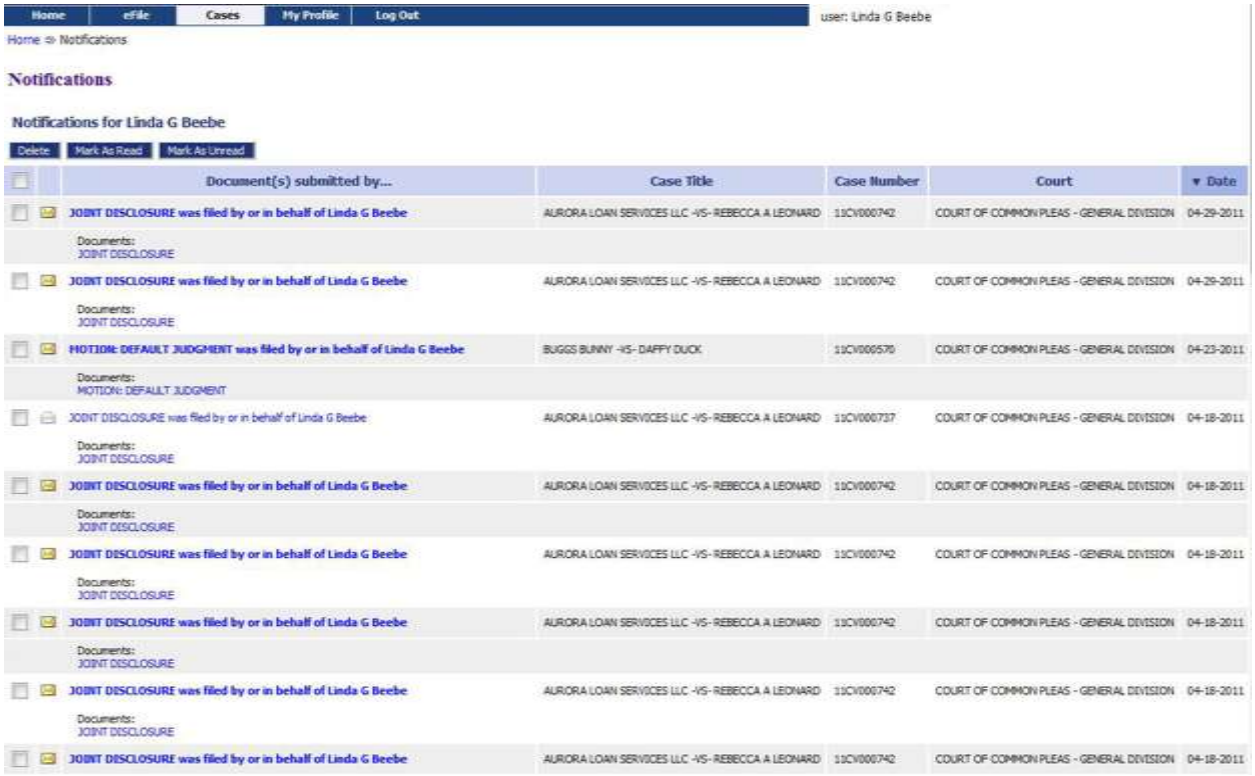
Figure 20: List of Notifications



4. An unopened envelope icon will appear to the left of each email notification you have not yet viewed.

5. Click the email link of the submission you wish to view. A secondary page opens where you can view the service list for the case. The list indicates both participants who have been served electronically by the court and a list of those participants who will need to be served by traditional, paper means.

6. A sub-listing of each email will display the documents that were filed with the case. Click on the document link to download a PDF of the document onto your local computer.

7. The envelope icon will change to an open envelope after you have viewed the email.

8. After you have viewed the email notification and downloaded the related documents, you can delete the notification by selecting the checkbox to the left of the notification and clicking the **Delete** button. The page will refresh, and the deleted notification will no longer appear on the list.

Viewing Filing Charges

Some documents that you file require court fees. Before you submit anything to the court, the final step is to review the data and documents in your submissions. The eFlex system automatically queries the Court system to calculate fees and displays those fees on the "Review and Approve" page for the filer. If one of the documents you included requires a court fee, you will be required to pay the fees with a

credit card. MasterCard®, American Express®, Discover® and Visa® payments are accepted. When payments are made, eFlex records the payments and keeps track of charges associated with each case and payments made for a twelve month period. Because a third party vendor is used for payments and because federal law stipulates, eFlex does not store any credit card information. If you go to the court and make a payment directly to the clerk, those payments will not appear in eFlex.

To view filing charges:

1. Select **Cases** > **Filing Charges** from the menu.

Figure 21: List of Filing Charges

2. The current month is displayed by default. Select a month from the "Report Month" drop-down list. Information about each payment made during that month, including the case number, case title, method of payment, and the amount, is displayed.

Working with e-File

There are four options under the menu bar option labeled "e-File". They are:

- **New Case**
- **Existing Case**
- **Filing Status**
- **Draft Filings**

Initiating a New Case

Prior to initiating a new case, prepare all documents associated with the case ahead of time. Be sure they are saved as a PDF and are under the 5 MB size limitation. For more information on document preparation, see the "Document Preparation Prior to Login" and the "Appendix A" sections of this manual.

1. From the home page, click the **New Case** button or select **e-File > New Case** from the menu bar at the top of most pages on the website. A "Court" page will appear.

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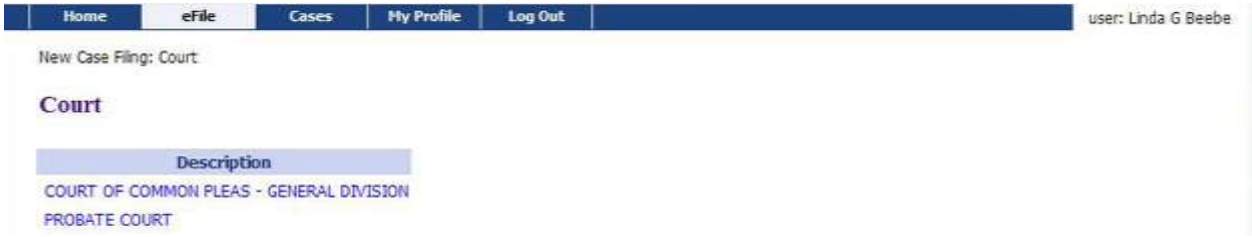
Figure 22: Define the New Case by Selecting the Court

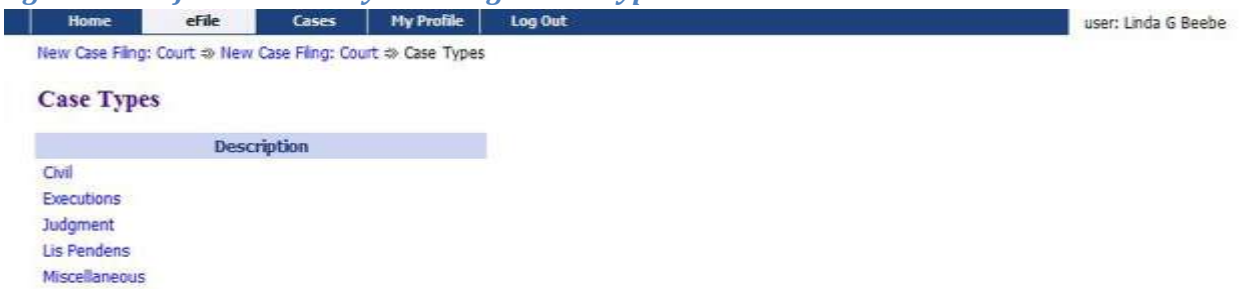


2. Click on the description of the court you will be filing with. The link will cause another "Court" page to appear listing divisions within the court you selected.

Figure 23: Select the Court Division

3. Further define your submission by clicking on the appropriate court division link. This will cause the "Case Types" page to appear.

Figure 24: Define the Case by Selecting a Case Type



4. Select the link for the appropriate case type. A "Case Subtype" page will appear.

To Add Case Parties and additional Case Data

1. When the "Case Subtype" page is displayed, click on the "Case Subtype" you wish to file. (The case subtype list will differ based on the "Case Type" you selected.) The "Case Initiation" page for the selected case subtype will appear.

Figure 25: Select the Case Subtype

2. **Optional:** If you do not see the case subtype you are wishing to file, click the **Back** button to be redirected to the "Case Type" page where you can make a different selection.

Figure 26: Begin Creating the Submission on the Case Initiation Page

3. **Optional:** If your organization has an office filing system for cases, in the "Filer Reference No" textbox enter the appropriate filing information for your organization's tracking purposes. This number only has meaning to your office personal/office filing system. It is in no way connected to the court system. The field for that number is included for your convenience only.

4. Select any options applicable to the case you are initiating by clicking in the radio box.

5. Click **Add My Parties**. The "Add a Party" page will open.

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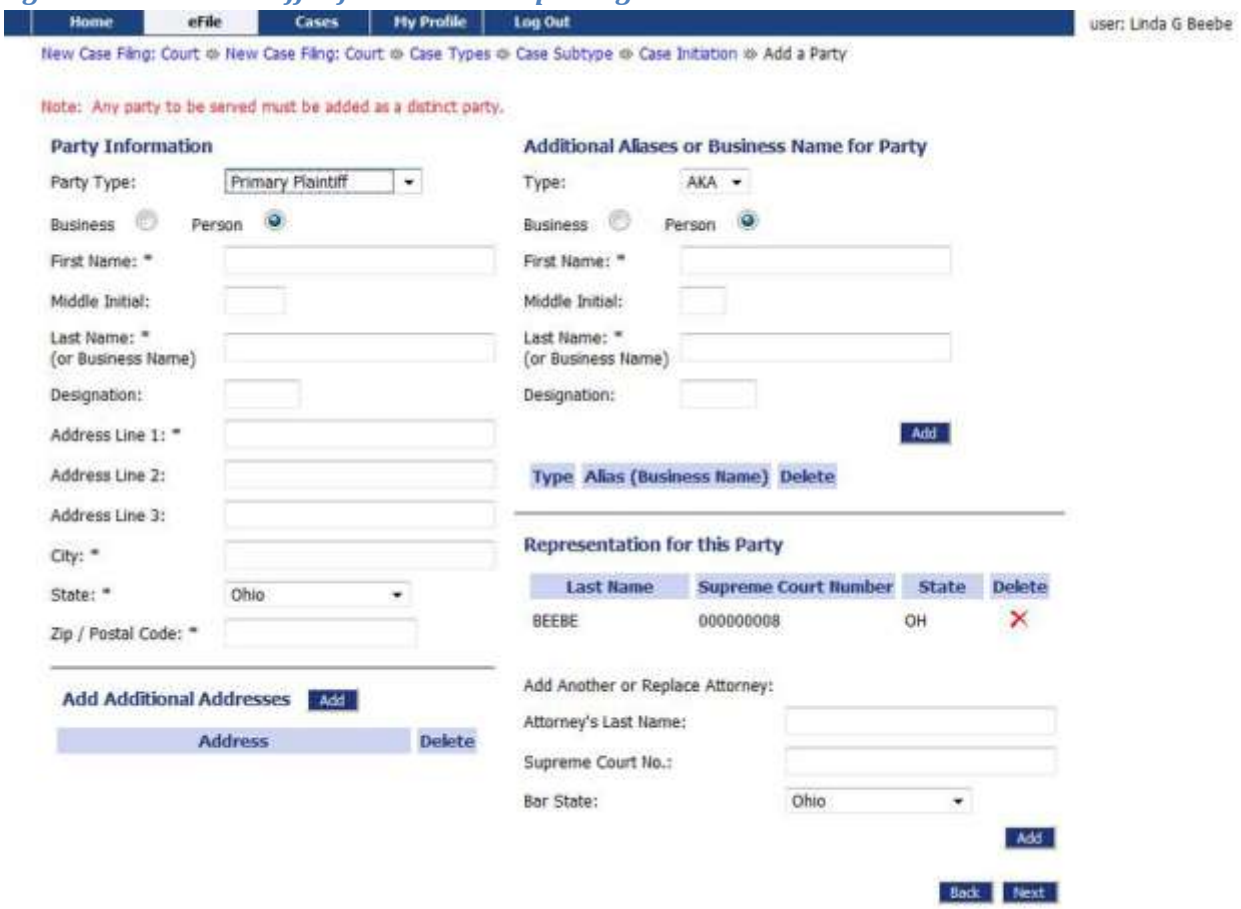
Figure 27: Add Plaintiff Information Sample Page



6. The **Add My Parties** button allows you to add the plaintiffs, appellants, and petitioners that you represent if you are an attorney. As an attorney, the e-Filing system automatically associates you to the parties you enter using the **Add My Party** button. If you are a Registered Filer/Pro Se, the e-Filing system automatically adds you as a party on the case.

7. Use the "Party Type" drop down list to select the correct party type.

8. Fill in all the fields that you have the information for. The case data requested will vary dependent upon which court the filing is for.

Note: Fields marked with an asterisk are required by this system; however, this does not mean those are the only fields you must fill in. This means these are the required fields to add a party on the case. Sometimes other information is not known, and in that case, you are not responsible to fill out fields of information you do not have. However, if you have the information, it is best to provide it. If the clerk would expect the information and it is not provided, then the clerk may reject the submission or require you to send in an additional submission with more information.

9. Click **Next**. This will return you to the "Case Initiation Page" where the party you added will appear on the list displayed.

Figure 28: Case Initiation Displays Plaintiff Added

10. **Optional:** Add additional plaintiffs following the same procedure listed above.

12. Click **Add Other Parties**. The "Add a Party" page allowing you to add defendants or respondents will appear.

Note: The **Add Other Parties** button **does not associate** you to the parties you are adding. You will have the option of adding the attorney for the defendant. If you do not have both the attorney's name and the attorney's bar number, do not add the attorney for the defendant.

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Figure 29: Add Defendant Information

13. Use the "Party Type" drop down list to select the correct party type.

14. Fill in all the fields that you have the information for.

Note: Fields marked with an asterisk are required by this system; however, this does not mean those are the only fields you must fill in. This means these are the required fields to add a party on the case. Sometimes other information is not known, and in that case, you are not responsible to fill out fields of information you do not have. However, if you have the information, it is best to provide it. If the clerk would expect the information and it is not provided, then the clerk may reject the submission or require you to send in an additional submission with more information.

10. Click **Next**. This will return you to the "Case Initiation Page" where the party you added will appear on the list displayed.

Figure 30: Case Initiation Page Displaying Both Parties

16. **Optional:** Add additional plaintiffs following the same procedure listed above.

To Add Documents on a New Case

1. Click **Next** on the "Case Initiation" page. The "Add a Document" page will display.

Figure 31: Add a Document

2. **Optional:** Use the drop-down menu to select a "Document Category." Although this is optional, the "Document Category" selection narrows the scope of the "Document Type" list, making it easier to find the correct "Document Type" from the list of documents shown. You can leave the "Document Category" list at the blank default. This will cause the "Document Type" list to display all possible documents that could be e-Filed on this "Case Subtype." If you are struggling

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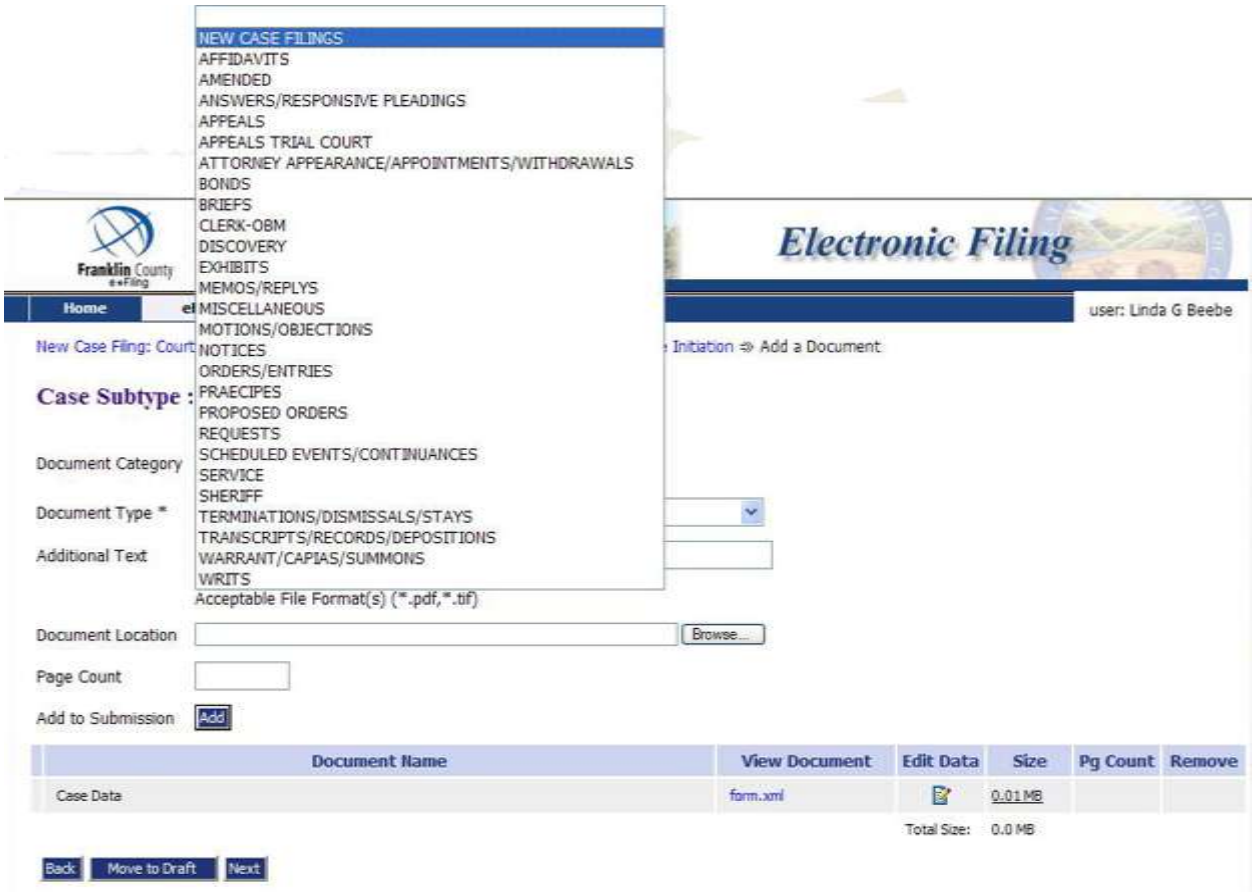
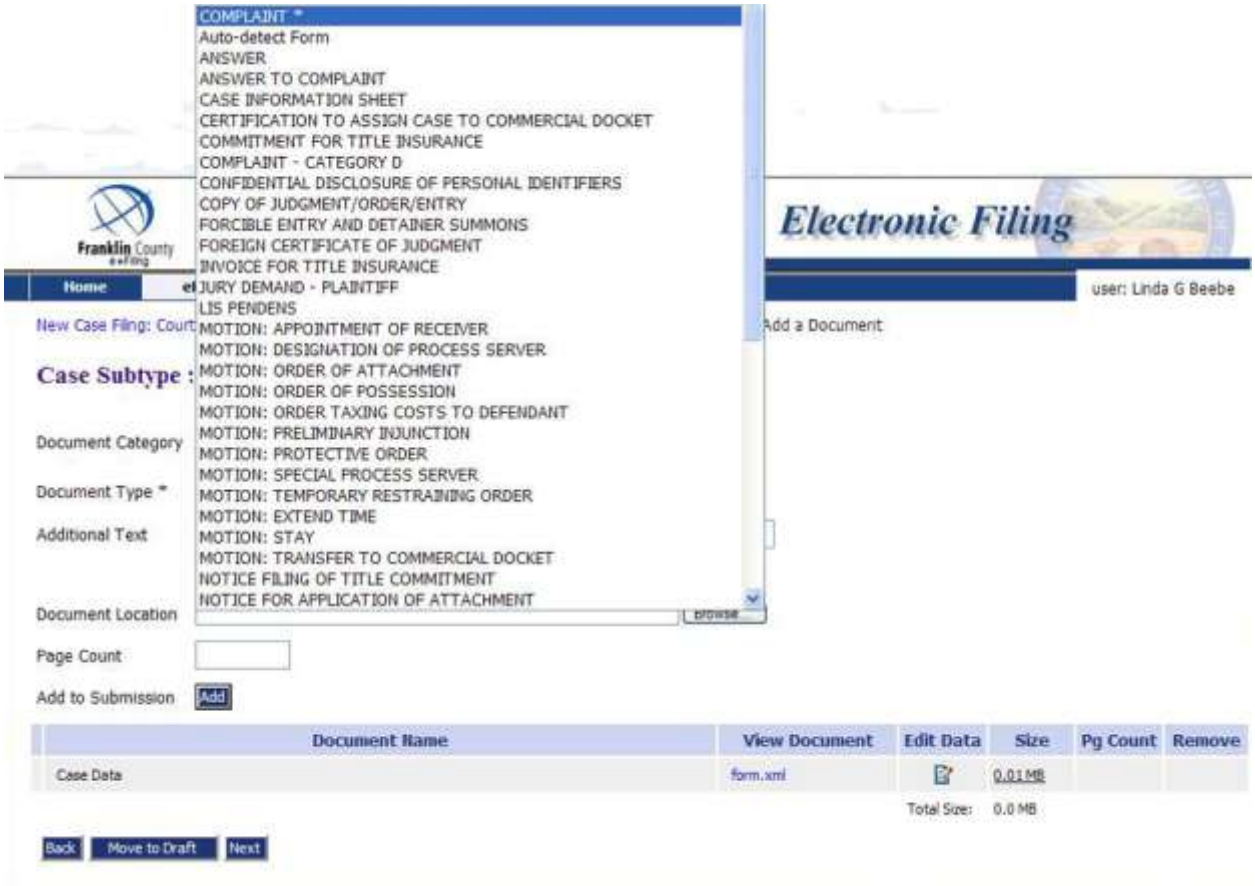
to find the right "Document Type," leave the "Document Category" blank to see all the documents.

Figure 32: Document Category Drop Down



3. From the "Document Type" pull-down menu, select the type of document you are going to add to this submission. You can add more than one document to this submission, but it must be done one document at a time, repeating each of the "Add Document" steps for each document.

Figure 33: Document Type Drop Down



4. **Optional:** Enter any "Additional Text" in the text field provided. This additional text helps the clerk, judge, or other participants understand more about the document. For example, if you are adding a motion, you may want to give more information about the purpose of the motion.

5. Locate the document you have prepared by clicking on **Browse**. The operating system "Open Dialog" will display.

6. Browse to locate your document, select the document, and then click on the **Open** button. This will return you to the "Add a Document" page with the file path to your document displayed in the "Document Location" field.

7. If you are uploading a non-PDF or TIFF, you must indicate the length of your document in the "Page Count" textbox.

8. Click the **Add** button. If the document is large, you will see a message "UPLOADING DOCUMENT. PLEASE WAIT". This process will copy the document from your local machine to the Court servers. Once the transfer is complete, repeat the steps 2 through 7 on this page to add additional documents.

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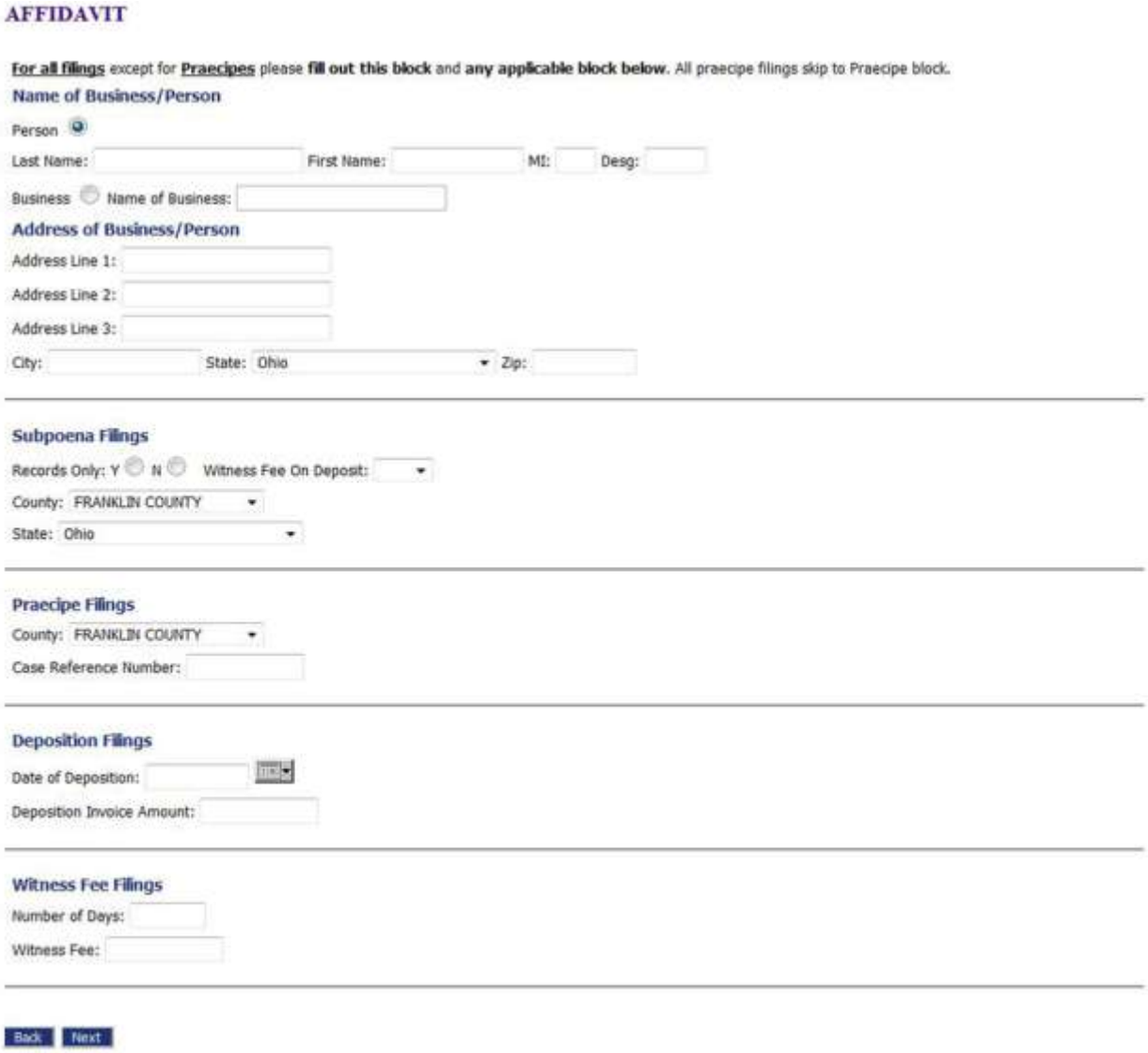
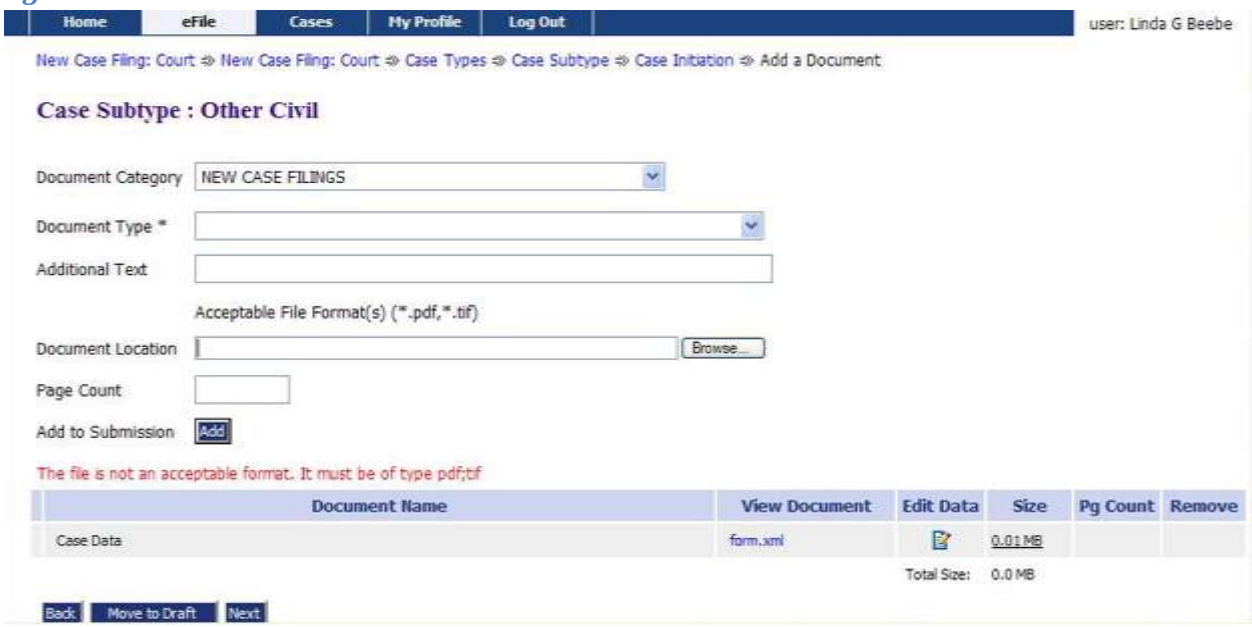
9. Some documents require additional information. If this is so, clicking **Add** will cause a screen to display requesting the additional information. This system generated form is referred to as a "Document Form." Fill out the displayed form as completely as you can, and click **Next**. Your documents will be added to the case at this time. Examples of a document type requiring the user to complete additional information are affidavits or "Notice of Case Association" for Pro Se filers.

Figure 34: Example Document Form Requiring Additional Information from User



Note: You must file documents in the accepted format (PDF, in most cases) and length. Please see instructions for "Document Preparation Prior to Login" at the beginning of this guide or "Appendix A" at the end of this guide. Failure to attach documents in the correct format will generate an error message.

Figure 35: Incorrect Document File Format



10. Each time you add a document, the document entry is displayed in the lower section of the page as shown in Figure 36. The picture below shows that a "Complaint" and an "Affidavit" were added with no additional text. The size of each document is also included on the entry as is the page count.

Figure 36: List of Added Documents

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10. **Optional:** If you click on the "View Document" link of each entry, the e-Filing system will copy the document stored in the Court Judicial Branch servers back to your local machine so you can view what you uploaded.

11. **Optional:** Click the "Edit Data" icon next to any listed document to change the information you entered that was associated to that document. If there is no information collected that is associated to that specific document, no "Edit Data" icon will be displayed for that document entry. For more information about these special documents, refer to the "Special Document Types" section of this user manual.

12. **Optional:** If you happened to upload the wrong document, you can click on the red "X" under the "Remove" column. This will remove that document from your submission. Then add the correct documents.

13. **Optional:** Click the **Cancel** button to discard the submission you just created. This will remove the documents from the Court Judicial Branch servers and eliminate the submission information.

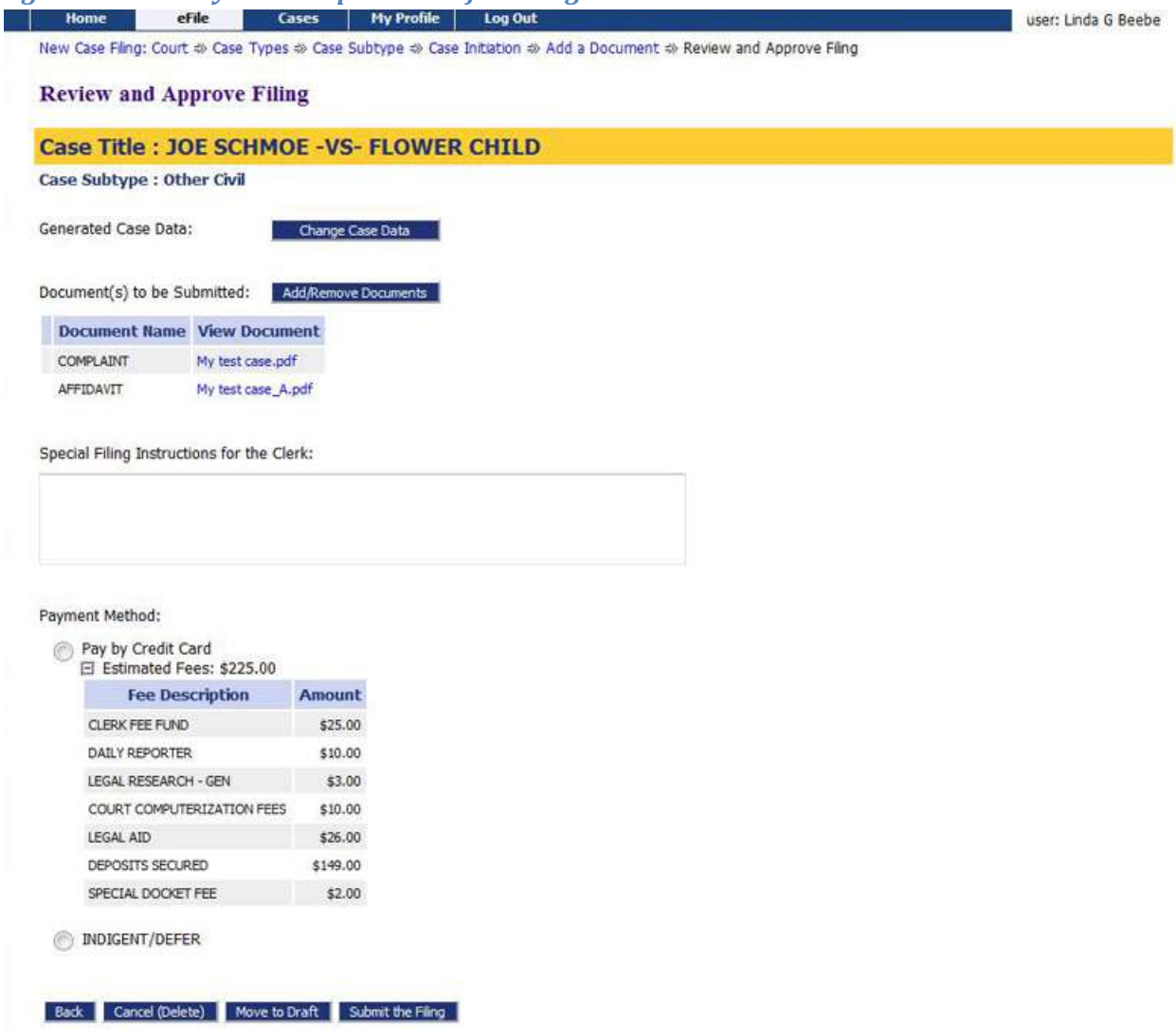
14. **Optional:** Click **Move to Draft** if you want to finish this submission at a later time. Each time you click on a **Next** button, the Court Judicial Branch servers are updated and the partial information you have entered in this process is recorded with the documents. If your session times out because of inactivity, you will be required to log in again. From the "Login" page, go to **Draft Filings** to finish your submission.

15. On the "Add a Document" page click the **Next** button at the bottom of the page. The "Review and Approve Filing" page will display.

To Submit the Initial Filing

The fee amount you owe is displayed on the "Review and Approve" page. Payment of fees must be completed before the filing will be submitted to the court. The "Review and Approve" page gives you several payment options. Payment by credit card will most often be the appropriate selection and is, therefore, listed first.

Figure 37: Fee Payment Requirement for Filing



1. In some cases, a waiver of immediate credit card payment may be the appropriate option to select. Some reasons for selecting the waiver option include indigents, second adoption submission, and others. Look at the waiver options to determine if any apply. Make sure you include appropriate affidavits to support any waiver option you may have selected. Do not select waivers to avoid payment.

2. **Optional:** From the "Review and Approve" page, you can also go back to change the case information, which includes the party information, by clicking on the **Change Case Data** button. (Refer to previous instructions to add or remove parties.)

3. **Optional:** You can go back to change the documents you have included in this submission by clicking the **Add/Remove Documents** button. This will re-direct you to the "Add a Document" page. (Refer to previous instructions to add or remove documents.) You can also click the **Back**

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button at the bottom of the "Review and Approve" page to go back to the "Add a Document" page.

4. **Optional:** You can cancel and discard this submission by clicking on the **Cancel (Delete)** button. This will remove the documents on the Court servers and delete any information about this submission that was not sent.

5. **Optional:** You can leave your submission in Draft state and finish it later by clicking on the **Move to Draft** button.

6. Click on the **Submit the Filing** button to file the submission. You will see a dialog box asking if you are ready to submit your filing.

7. If you owe fees, after clicking **OK** on the dialog box, you will be directed to "Pay Gov," a PCI certified secure payment site.

Note: Credit card information must be re-entered with each filing as, according to the Payment Card Industry (PCI) standards, the system does not record or retain credit card information.

Figure 38: Secure Payment Site Information

8. Your charges are displayed on the left hand column.

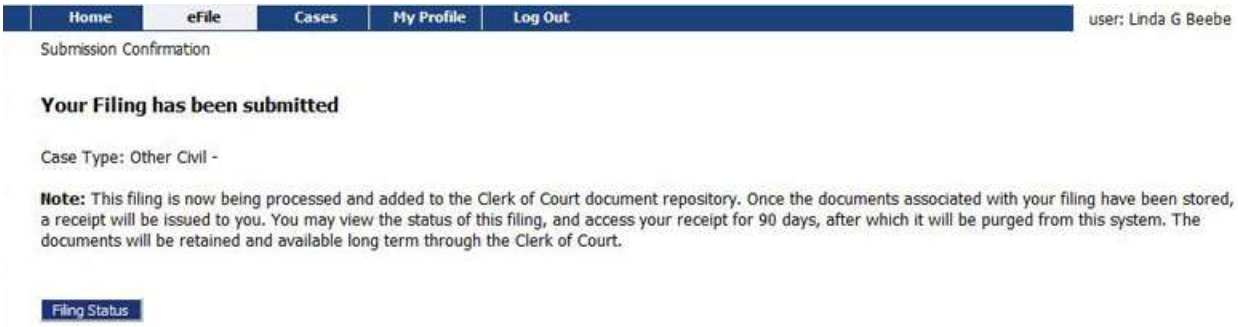
9. Enter the required information and submit your payment by clicking the **Review and Pay** button.

10. After reviewing the information displayed, click **Submit**. The e-Filing system will contact the payment process to collect money and then transfer the submission for the clerk to review or for the judge to review.

11. **Optional:** Clicking the **Cancel** button will return you to the "Review and Approve" page.

12. If your payment is successful, "Your Filing has been Submitted" message is displayed as shown below.

Figure 39: Filing Submitted Message



13. When this message is displayed, it means your payment was successful and your submission is being transferred for review.

14. **Optional:** Click on the **Filing Status** button if you wish to review the status of your submission. The status may take a few minutes to update. If you continue to refresh the status page, you will see the status of your submission change. "Awaiting Approval" means payment is processed and has been received by the court's servers, and the submission is waiting to be recorded. When the submission has completed all the steps at the court, your submission will have an "Accepted" status. If you sent in a "Proposed Order," an "Accepted, Presented to Judge" status does not mean the proposed order is accepted; it simply means the proposed order has reached the point where a judge can review the document.

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Figure 40: Filing Status

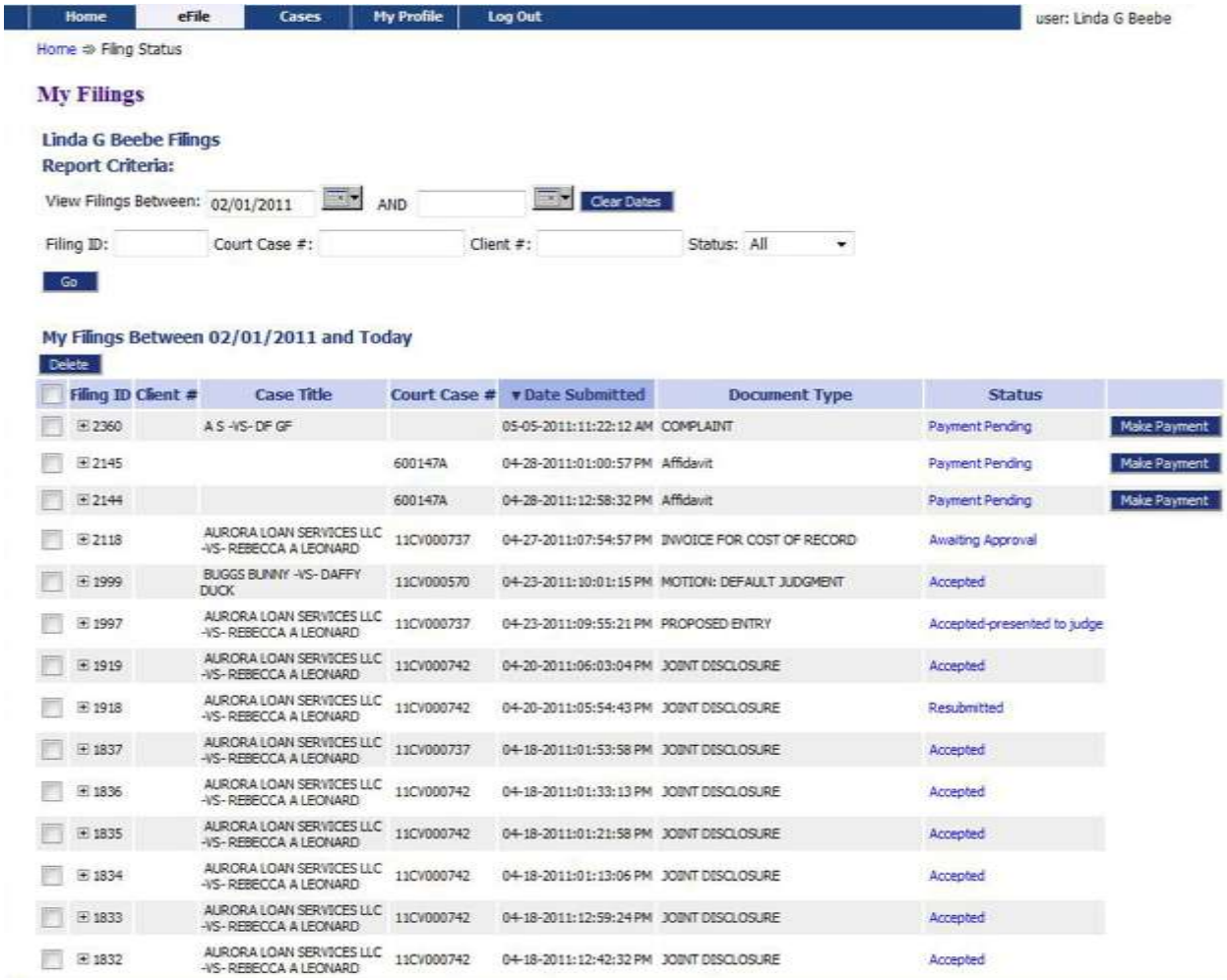
15. Click the **Home** link on the menu or any other link to go to a different point in the e-File application.

To View or Print Documents Associated with A Case:

The "Filing Status" page will allow you to access documents that were filed with your case for either viewing or printing purposes.

1. To access the "Filing Status" page, select **Filing Status** from the "Home" page or **e-File>My Filings** from the menu bar at the top of any page.

Figure 41: My Filings Page Displays Filings with Links for Additional Information



2. The "My Filings" page will appear, allowing you to search for the case you need. Click on the link under the "Status" column, and you will be directed to the "Filing Status" page for that particular case.

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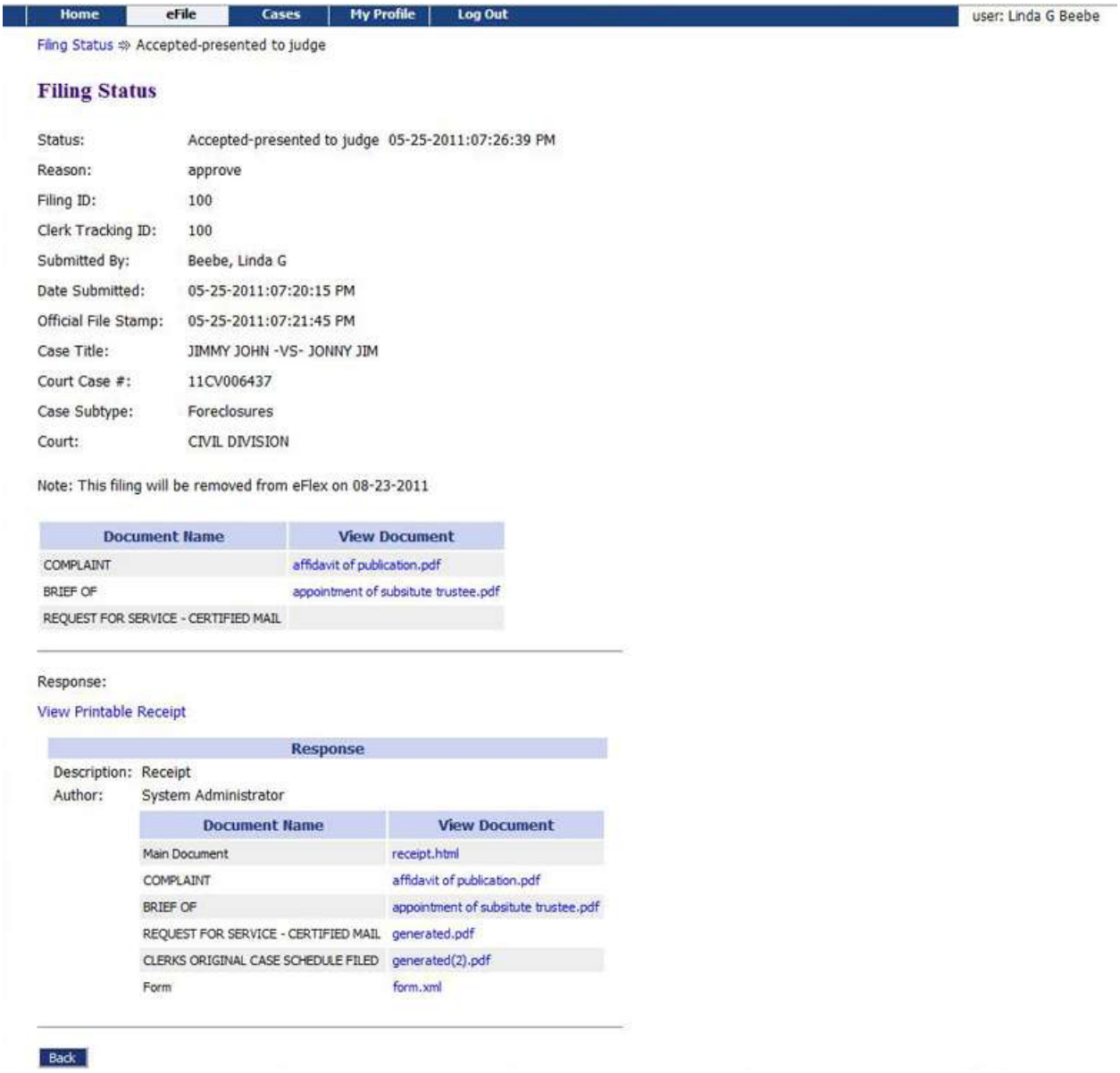
Figure 42: Viewing Documents from the Filing Status Page



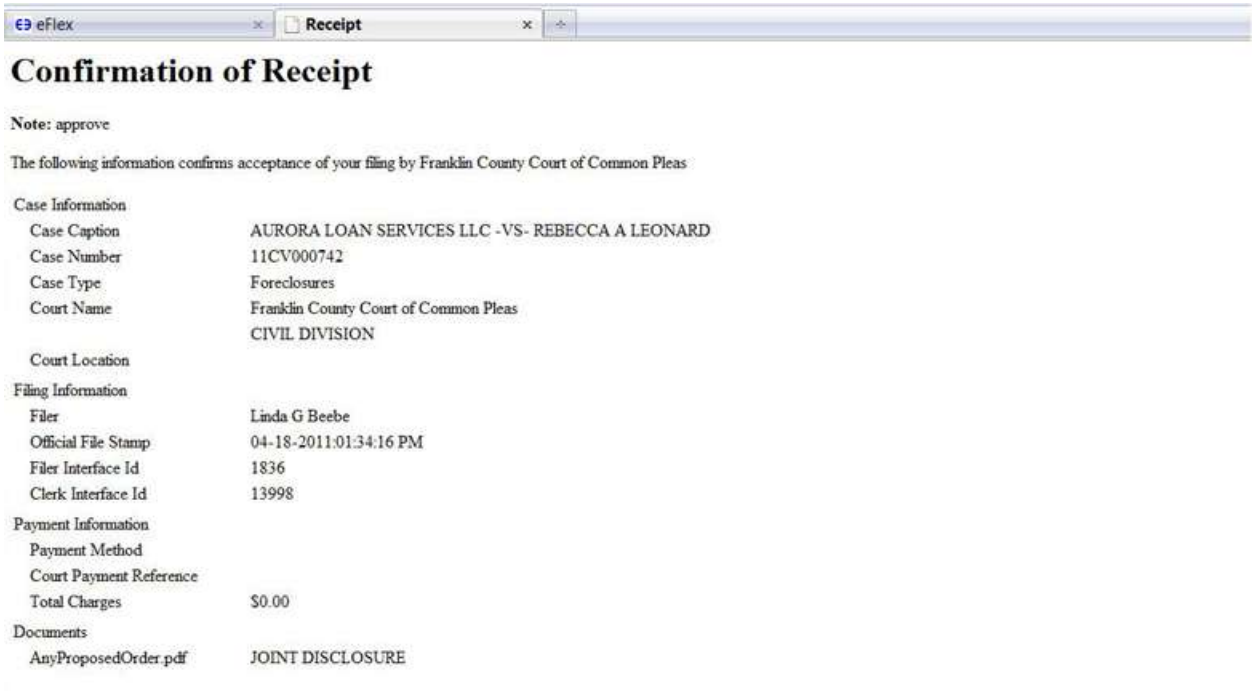
3. The documents you originally submitted may be viewed by clicking the link under "View Documents" in the listing above the horizontal line on the page. These documents do not have the court's time and date stamp.

4. Below the horizontal line on the page, you will find a "Response" section. It is in this section that you will be able to view or print documents that have been processed by the court. The documents listed in the "Response" section will include a court time/date stamp and, if required, the court's electronic signature. In the "Response" section, any document that is listed as "generated.pdf" is a court generated, required document that is based on the document you filed with the case initiation. Do not open the "form.xml" link as this is simply

computer code that the system administrator can use for information in case troubleshooting is necessary.

Note: Once you have opened a document listed under the "Response," it is imperative that you print it or save the signed document to your local machine using a "Save As" command as "Response" documents will be removed from your e-Filer view after 90 days.

Figure 43: Court Generated Receipt


eFlex | Receipt

Confirmation of Receipt

Note: approve

The following information confirms acceptance of your filing by Franklin County Court of Common Pleas

Case Information	
Case Caption	AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD
Case Number	11CV000742
Case Type	Foreclosures
Court Name	Franklin County Court of Common Pleas
	CIVIL DIVISION
Court Location	
Filing Information	
Filer	Linda G Beebe
Official File Stamp	04-18-2011:01:34:16 PM
Filer Interface Id	1836
Clerk Interface Id	13998
Payment Information	
Payment Method	
Court Payment Reference	
Total Charges	$0.00
Documents	
AnyProposedOrder.pdf	JOINT DISCLOSURE

e-Filing to an Existing Case

Filing to an existing case is similar to filing a new case.

To add a document to an existing case:

1. Click **File to Existing Case** on the home page or select **e-File** > **Existing Case** from the menu bar on the top of any page. The "Existing Cases" page will appear.

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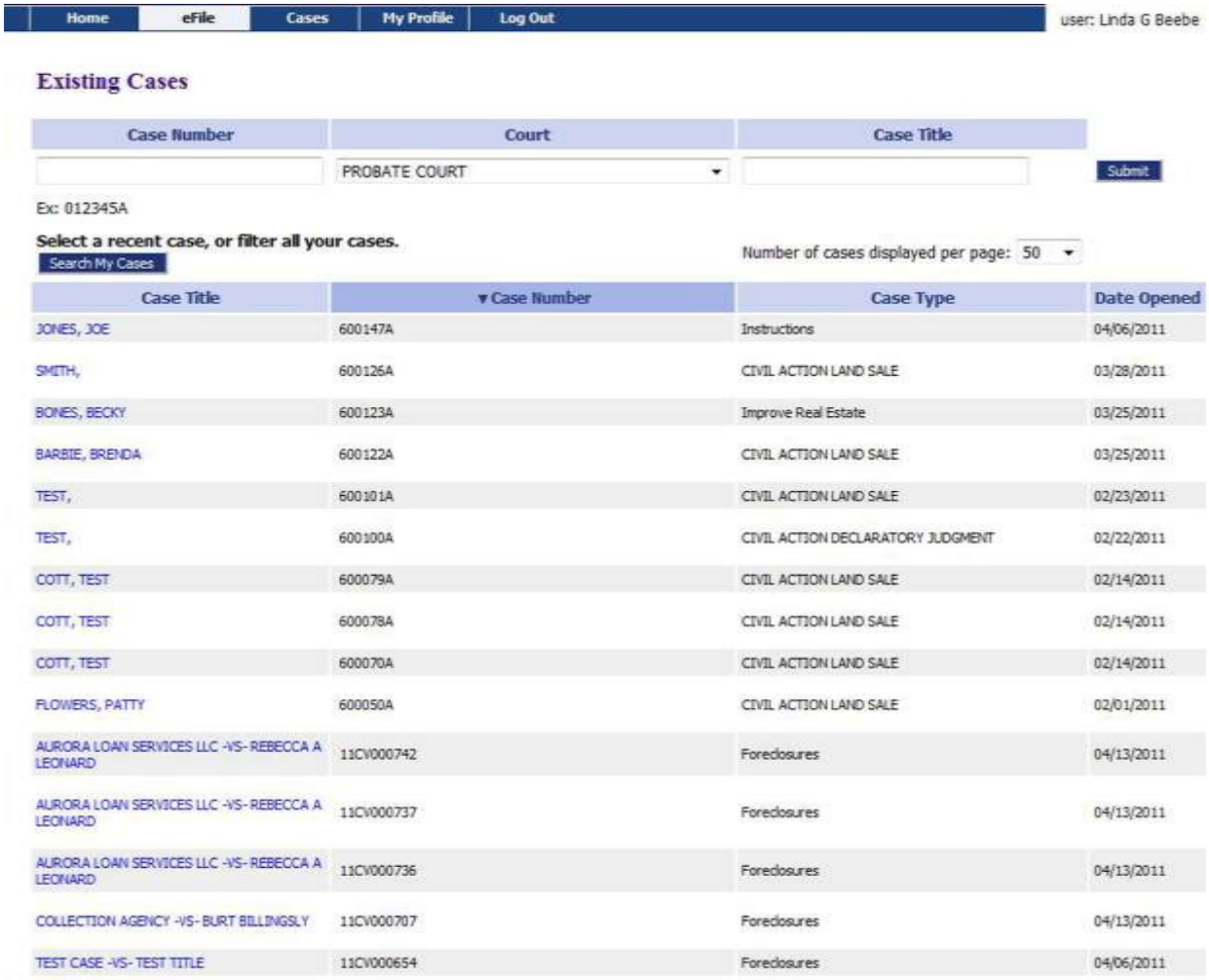
Figure 44: Existing Cases



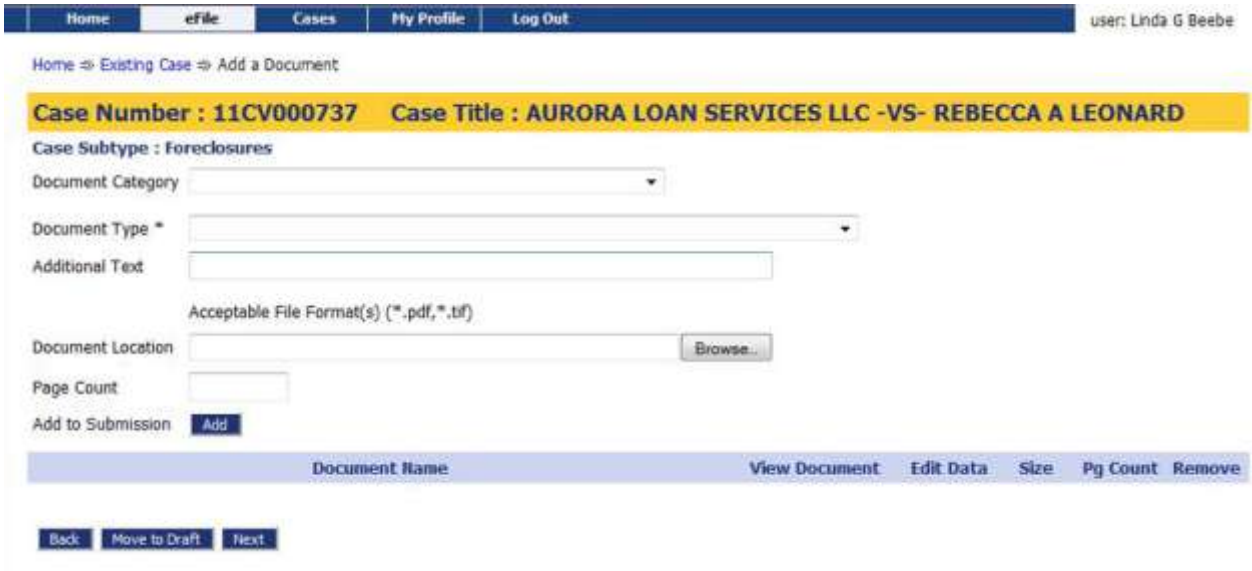
2. If you are not yet registered as a participant on the case, you must enter a case number, court, and participant's last name (or, if Probate, the last name on the case title). Click **Submit** in the upper section of this page. This action will check to see if this case was initiated electronically in the e-Filing system.

3. If you entered the wrong case number, wrong court, or did not enter a Party's last name properly, you will receive an error message, and you must repeat the process.

4. If you are already registered on the case, you can select a case from the list on the page as displayed in Figure 44.

5. From either method of selecting a specific case, the "Add a Document" page will display. The "Add a Document" page allows a filer to distinguish between an existing case and a new case by means of a yellow banner near the top of the page for an existing case. A new case has no such banner.

Figure 45: Yellow Banner on Existing Case Add a Document Page



6. **Optional:** Use the drop-down menu to select a "Document Category." Although this is optional, the "Document Category" selection narrows the scope of the "Document Type" list, making it easier to find the correct "Document Type" from the list of documents shown. You can leave the "Document Category" list at the blank default. This will cause the "Document Type" list to display all possible documents that could be e-Filed on this "Case Subtype." If you are struggling to find the right "Document Type," leave the "Document Category" blank to see all the documents.

7. From the "Document Type" pull-down menu, select the type of document you are going to add to this submission. You can add more than one document to this submission, but it must be done one document at a time, repeating each of the "Add Document" steps for each document.

8. **Optional**: Enter any "Additional Text" in the text field provided. This additional text helps the clerk, judge, or other participants understand more about the document. For example, if you are adding a motion, you may want to give more information about the purpose of the motion.

9. Locate the document you have prepared by clicking on **Browse**. The operating system "Open Dialog" will display. Browse to locate your document, select the document, and then click on the **Open** button. This will return you to the "Add a Document" page with the file path to your document displayed in the "Document Location" field.

10. If you are uploading a non-PDF or TIFF, you must indicate the length of your document in the "Page Count" textbox.

11. Click the **Add** button. If the document is large, you will see a message "UPLOADING DOCUMENT. PLEASE WAIT". This process will copy the document from your local machine to the Court

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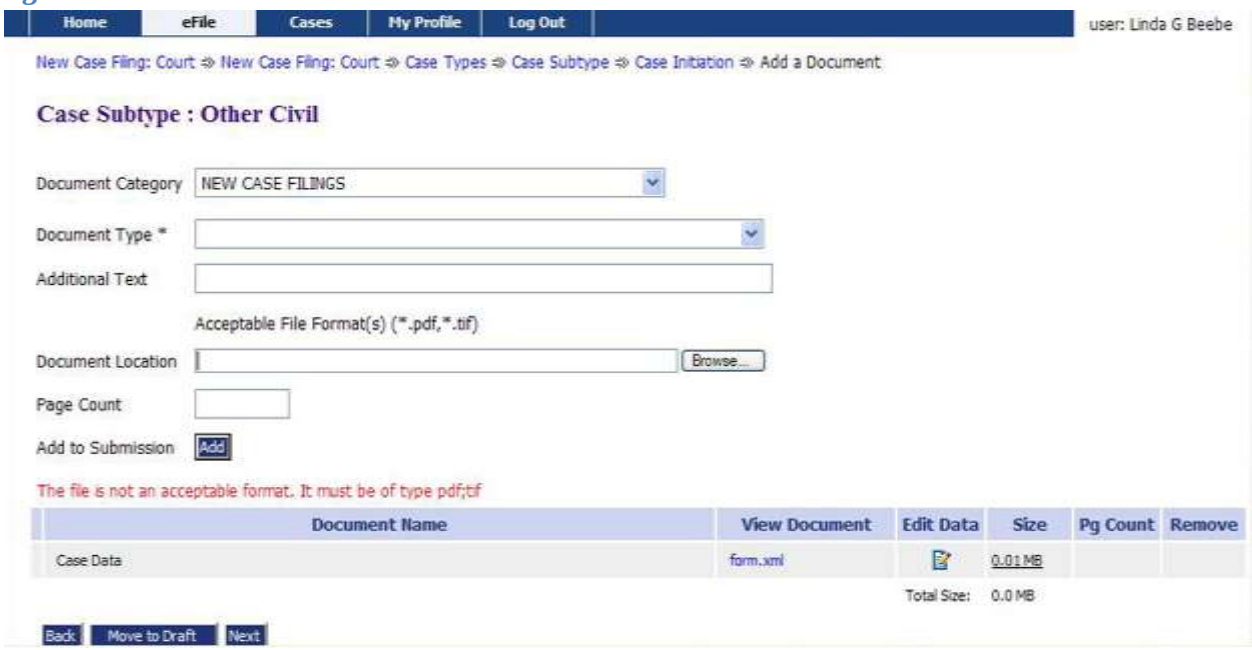
servers. Once the transfer is complete, repeat the steps 2 through 7 on this page to add additional documents.

12. Some documents require additional information. If this is so, clicking **Add** will cause a screen to display requesting the additional information. Fill out the displayed form as completely as you can, and click **Next**. Your documents will be added to the case at this time. Examples of a document type requiring the user to complete additional information are affidavits or appearance.

Figure 46: Additional Information Required when Adding Some Documents

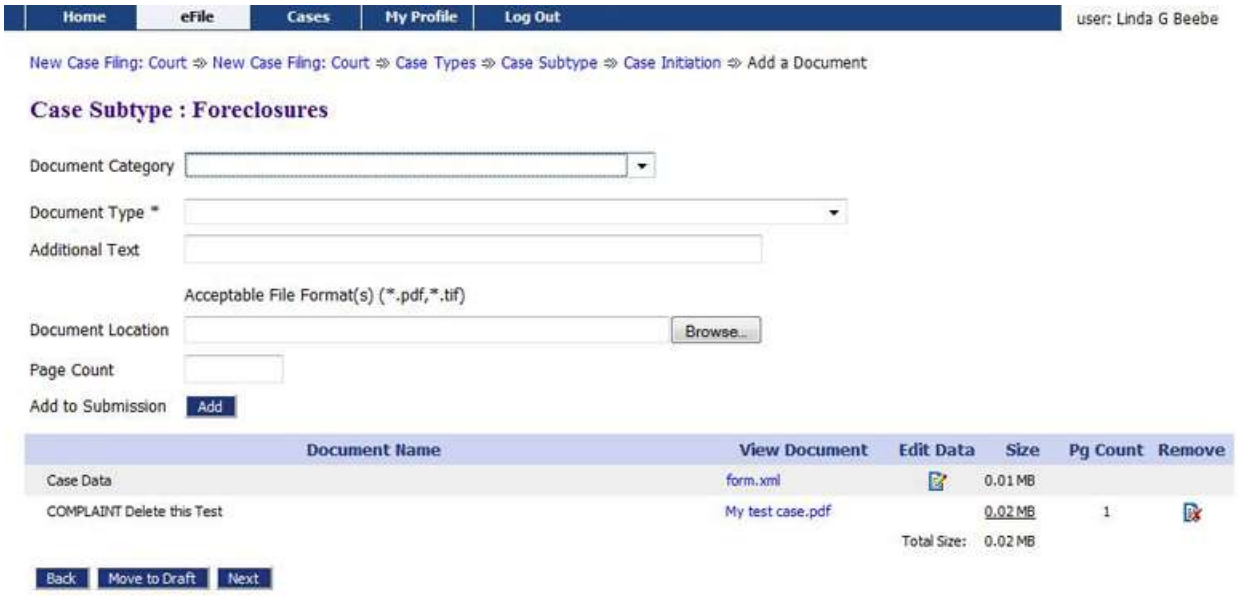
Note: You must file documents in the accepted format (PDF, in most cases) and length. Please see instructions for "Document Preparation Prior to Login" at the beginning of this guide or "Appendix A" at the end of this guide. Failure to attach documents in the correct format will generate an error message.

Figure 47: Incorrect Document File Format



13. Each time you add a document, the document entry is displayed in the lower section of the page as shown in Figure 36. The picture below shows that a "Complaint" and an "Affidavit" was added with no additional text. The size of each document is also included on the entry as is the page count.

Figure 48: List of Added Documents



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14. **Optional:** If you click on the "View Document" link of each entry, the e-Filing system will copy the document stored in the Court Judicial Branch servers back to your local machine so you can view what you uploaded.

15. **Optional:** Click the "Edit Data" icon next to any listed document to change the information you entered that was associated to that document. If there is no information collected that is associated to that specific document, no "Edit Data" icon will be displayed for that document entry. For more information about these special documents, refer to the "Special Document Types" section of this user manual.

16. **Optional:** If you happened to upload the wrong document, you can click on the red "X" under the "Remove" column. This will remove that document from your submission. Then add the correct documents.

17. **Optional:** Click the **Cancel** button to discard the submission you just created. This will remove the documents from the Court Judicial Branch servers and eliminate the submission information.

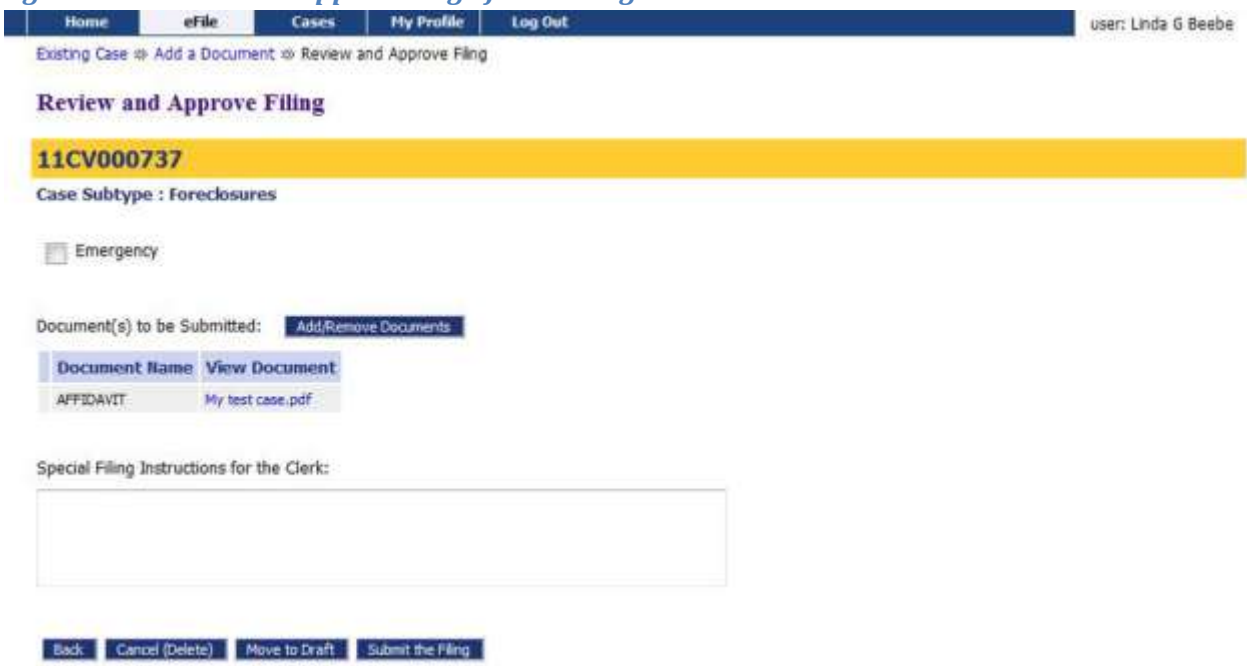
18. **Optional:** Click **Move to Draft** if you want to finish this submission at a later time. Each time you click on a **Next** button, the Court Judicial Branch servers are updated and the partial information you have entered in this process is recorded with the documents. If your session times out because of inactivity, you will be required to log in again. From the "Login" page, go to **Draft Filings** to finish your submission.

19. On the "Add a Document" page click the **Next** button at the bottom of the page. The "Review and Approve Filing" page will display.

To Submit a Filing to an Existing Case

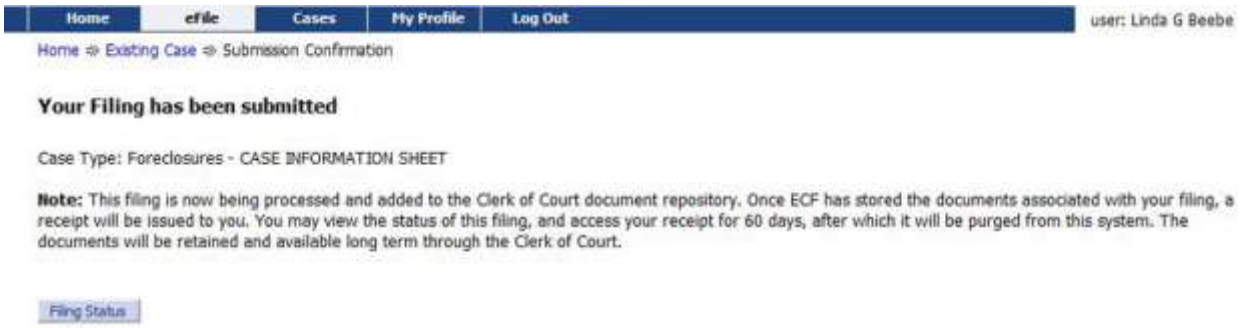
Generally there are no fees for follow-up filings; however, there are a few documents that require fees. The fee amount you owe is displayed on the "Review and Approve" page. Payment of fees must be completed before the filing will be submitted to the court. To make a payment, click on the link to enter your credit card information. The "Review and Approve" page gives you several payment options. Payment by credit card will most often be the appropriate selection and is, therefore, listed first.

Figure 49: Review and Approve Page for Existing Cases



1. If you do not owe fees, click the **Submit the Filing** button. A message will appear indicating your filing has been submitted. Click the **Filing Status** button at the bottom of the message to be returned to the "My Filings" page.

Figure 50: Filing Has Been Submitted



2. In some cases, a waiver of immediate credit card payment may be the appropriate option to select. Some reasons for selecting the waiver option include indigents, second adoption submission, and others. Look at the waiver options to determine if any apply. Make sure you include appropriate affidavits to support any waiver option you may have selected. Do not select waivers to avoid payment.

3. **Optional:** From the "Review and Approve" page, you can also go back to change the case information, which includes the party information, by clicking on the **Change Case Data** button. (Refer to previous instructions to add or remove parties.)

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4. **Optional:** You can go back to change the documents you have included in this submission by clicking the **Add/Remove Documents** button. This will re-direct you to the "Add a Document" page. (Refer to previous instructions to add or remove documents.) You can also click the **Back** button at the bottom of the "Review and Approve" page to go back to the "Add a Document" page.

5. **Optional:** You can cancel and discard this submission by clicking on the **Cancel (Delete)** button. This will remove the documents on the Court Judicial Branch servers and delete any information about this submission that was not sent.

6. **Optional:** You can leave your submission in Draft state and finish it later by clicking on the **Move to Draft** button.

7. Click on the **Submit the Filing** button to file the submission.

8. If you owe fees, after clicking **OK** on a dialog box, you will be directed to a PCI certified secure payment site.

Note: Credit card information must be re-entered with each filing as, according to the Payment Card Industry (PCI) standards, the system does not record or retain credit card information.

Figure 50: Secure Payment Site Information

1. Your charges are displayed on the left hand column.

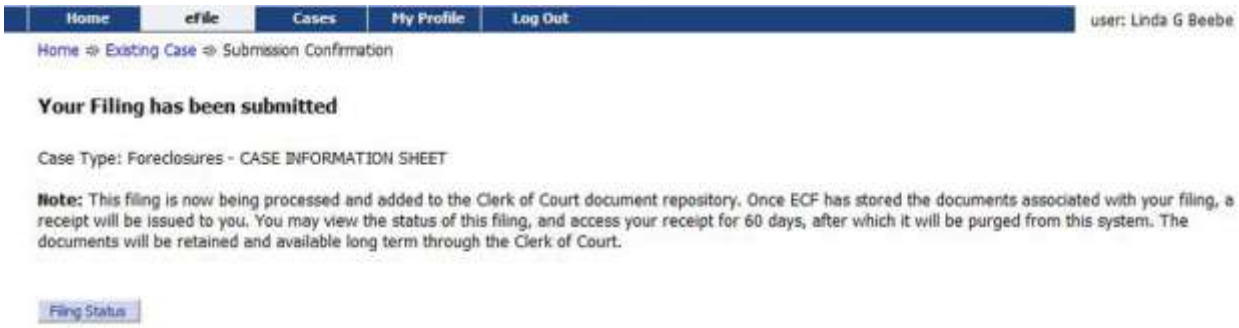
2. Enter the required information and submit your payment by clicking the **Review and Pay** button.

3. After reviewing the information displayed, click **Submit**. The e-Filing system will contact the payment process to collect money and then transfer the submission for the clerk to review or for the judge to review.

4. **Optional:** Clicking the **Cancel** button will return you to the "Review and Approve" page.

5. If your payment is successful, "Your Filing has been Submitted" message is displayed as shown below.

Figure 51: Filing Submitted Message



6. When this message is displayed, it means your payment was successful and your submission is being transferred for review.

7. **Optional:** Click on the **Filing Status** button if you wish to review the status of your submission. The status may take a few minutes to update. If you continue to refresh the status page, you will see the status of your submission change. "Awaiting Approval" means payment is processed and has been received by the court's servers, and the submission is waiting to be recorded. When the submission has completed all the steps at the court, your submission will have an "Accepted" status. If you sent in a "Proposed Order," an "Accepted, Presented to Judge" status does not mean the proposed order is accepted; it simply means the proposed order has reached the point where a judge can review the document.

8. Click the **Home** link on the menu or any other link to go to a different point in the e-File application.

Understanding Filing Status

Whenever you e-File something to the court, the status of your filing is updated to reflect its progress. Each filing will be updated with several different statuses. Some happen so quickly that you may not see all the status changes. The "My Filings" page displays the status of each submission as it is updated until the final status of "Accepted" has been posted. You may use the **Go** button near the top of the page to "Refresh" the page view. A filing can have the status of

- **Package Pending** - The submission is being prepared for clerk review but not yet sent.
- **Packaged** - The submission is prepared and sent for clerk review.

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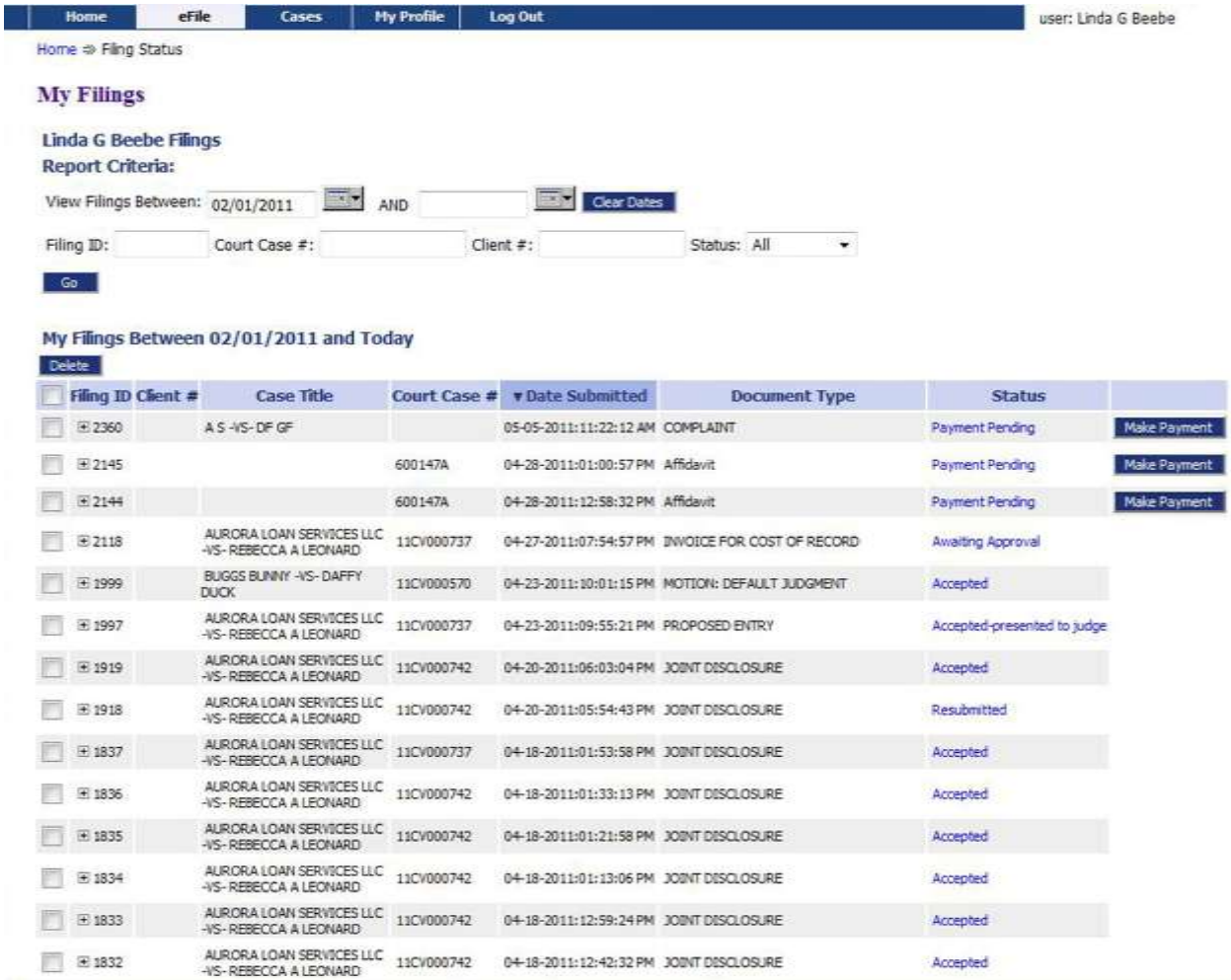
- **Received** - The submission has received a time stamp and will be placed in a queue for further processing.
- **Awaiting Approval** - The submission is in a queue for further processing.
- **Accepted** - The Clerk has approved submission, and it is being processed. Be patient.
- **Receipt Pending** - An error occurred in communications. Call the e-Filing administrator.
- **Not Accepted** - Submission was denied.
- **Accepted** - No further action. The filer should look at their case history or receipt of the submission to download signed documents and check for notes from the Clerk.
- **Accepted-Presented to Judge** –Accepted and routed to a Judicial Queue for a judge to review. This means that even though the submission has been filed, the proposed document may not have been reviewed at this time, but it has been presented to a judge.
- **Resubmitted** - This submission was "Not Accepted," and the filer used the old submission to create a new submission. The status of this submission has no future value, and the filer needs to look at the new submission status.

Figure 52: Check Filing Status on My Filings Page



Filing ID	Client #	Case Title	Court Case #	▼Date Submitted	Document Type	Status	
2360		A S -VS- DF GF		05-05-2011:11:22:12 AM	COMPLAINT	Payment Pending	Make Payment
2145			600147A	04-28-2011:01:00:57 PM	Affidavit	Payment Pending	Make Payment
2144			600147A	04-28-2011:12:58:32 PM	Affidavit	Payment Pending	Make Payment
2118		AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	11CV000737	04-27-2011:07:54:57 PM	INVOICE FOR COST OF RECORD	Awaiting Approval	
1999		BUGGS BUNNY -VS- DAFFY DUCK	11CV000570	04-23-2011:10:01:15 PM	MOTION: DEFAULT JUDGMENT	Accepted	
1997		AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	11CV000737	04-23-2011:09:55:21 PM	PROPOSED ENTRY	Accepted-presented to judge	
1919		AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	11CV000742	04-20-2011:06:03:04 PM	JOINT DISCLOSURE	Accepted	
1918		AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	11CV000742	04-20-2011:05:54:43 PM	JOINT DISCLOSURE	Resubmitted	
1837		AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	11CV000737	04-18-2011:01:53:58 PM	JOINT DISCLOSURE	Accepted	
1836		AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	11CV000742	04-18-2011:01:33:13 PM	JOINT DISCLOSURE	Accepted	
1835		AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	11CV000742	04-18-2011:01:21:58 PM	JOINT DISCLOSURE	Accepted	
1834		AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	11CV000742	04-18-2011:01:13:06 PM	JOINT DISCLOSURE	Accepted	
1833		AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	11CV000742	04-18-2011:12:59:24 PM	JOINT DISCLOSURE	Accepted	
1832		AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	11CV000742	04-18-2011:12:42:32 PM	JOINT DISCLOSURE	Accepted	

Each entry in the list represents the status of a filing.

Each entry on the "My Filings" page is temporary and is deleted after a certain period of time. The period of time this information remains is configurable by the e-Filing administrator, but is usually not less than 30 days.

Note: You should check each entry. Although a status is complete, there may still be a note from the Clerk of the Court informing you of some condition. Be sure to check each receipt.

To check the status of your submissions:

1. From the Home page, click **Filing Status** or click **e-File** > **My Filings** from the menu bar at the top of any page.
2. **Optional:** Filter the list by using the calendar icons to select a starting and ending date. Then click **Go**. If you leave the end date blank, the system default is today's date.
3. Click the "+" symbol in the "Filing ID" column to display the documents associated with the filing.
4. **Optional:** Click the document name link that appears when you click the "+" symbol to view/download the document.
5. Click the filing "Status" on the right to display additional details about the filing. This will include information such as the time-stamp on your submission.

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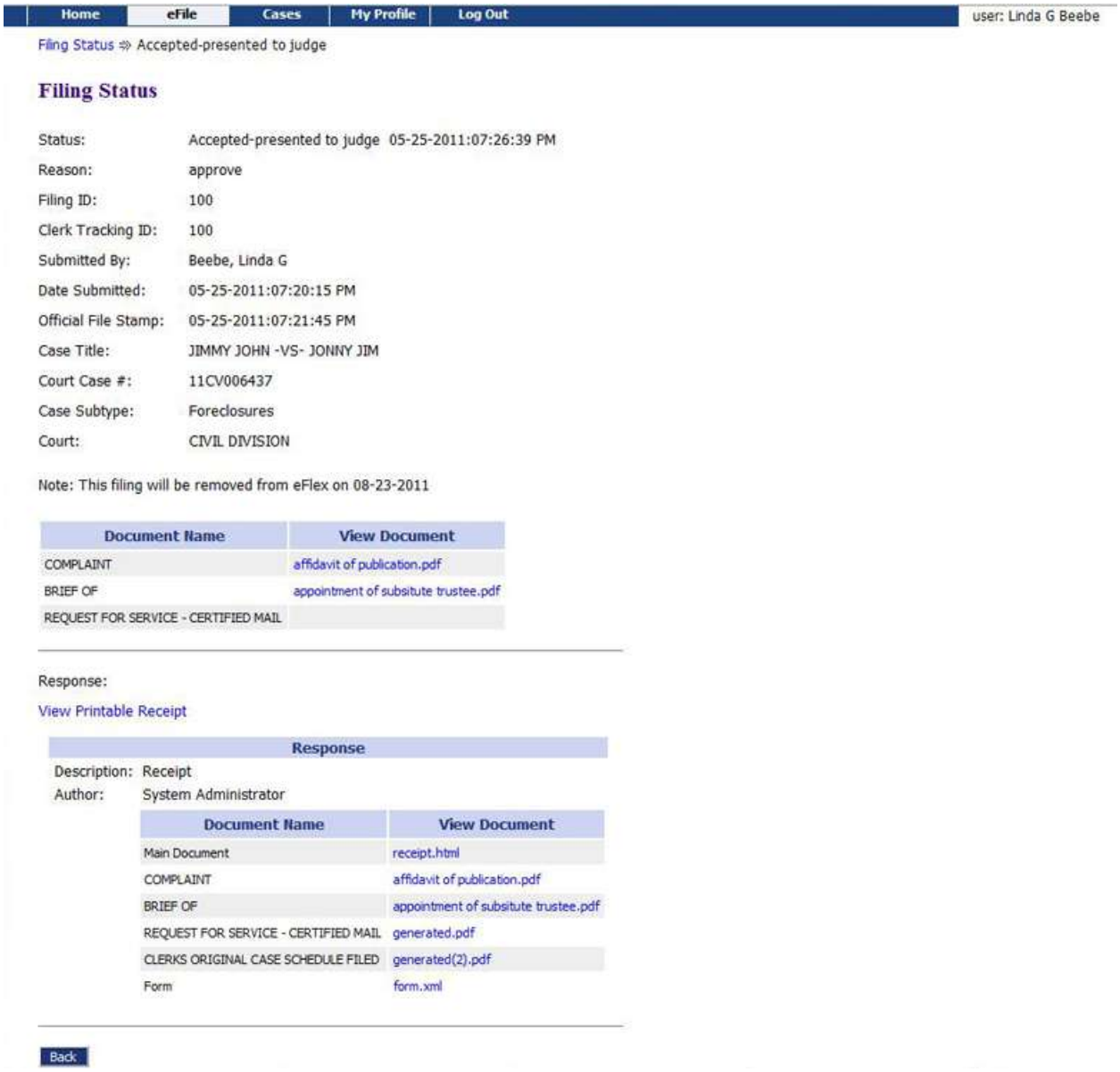
Figure 53: View Documents Associated with the Filing from the Filing Status Page



6. **Optional:** On the "Filing Status" page that appears after clicking the link, view/download the document by clicking the "View Document" link.

Handling a "Returned Not Filed" Status

If a submission is "Not Accepted," the receipt will include a reason field. Although some reasons are entered automatically by the system, for example, if one of the documents contained a virus, the clerk typically types in the reason for the rejection.

1. When a submission is "Not Accepted," a **Resubmit** button appears next to the status.

2. Click **Resubmit** to automatically create a new submission based on the previously rejected submission.

3. Change what was rejected by either deleting the document in question or correcting the information entered.

Note: The "Filing Status" screen is not where you should look for case information; instead, click **My Cases** on the "Home" page.

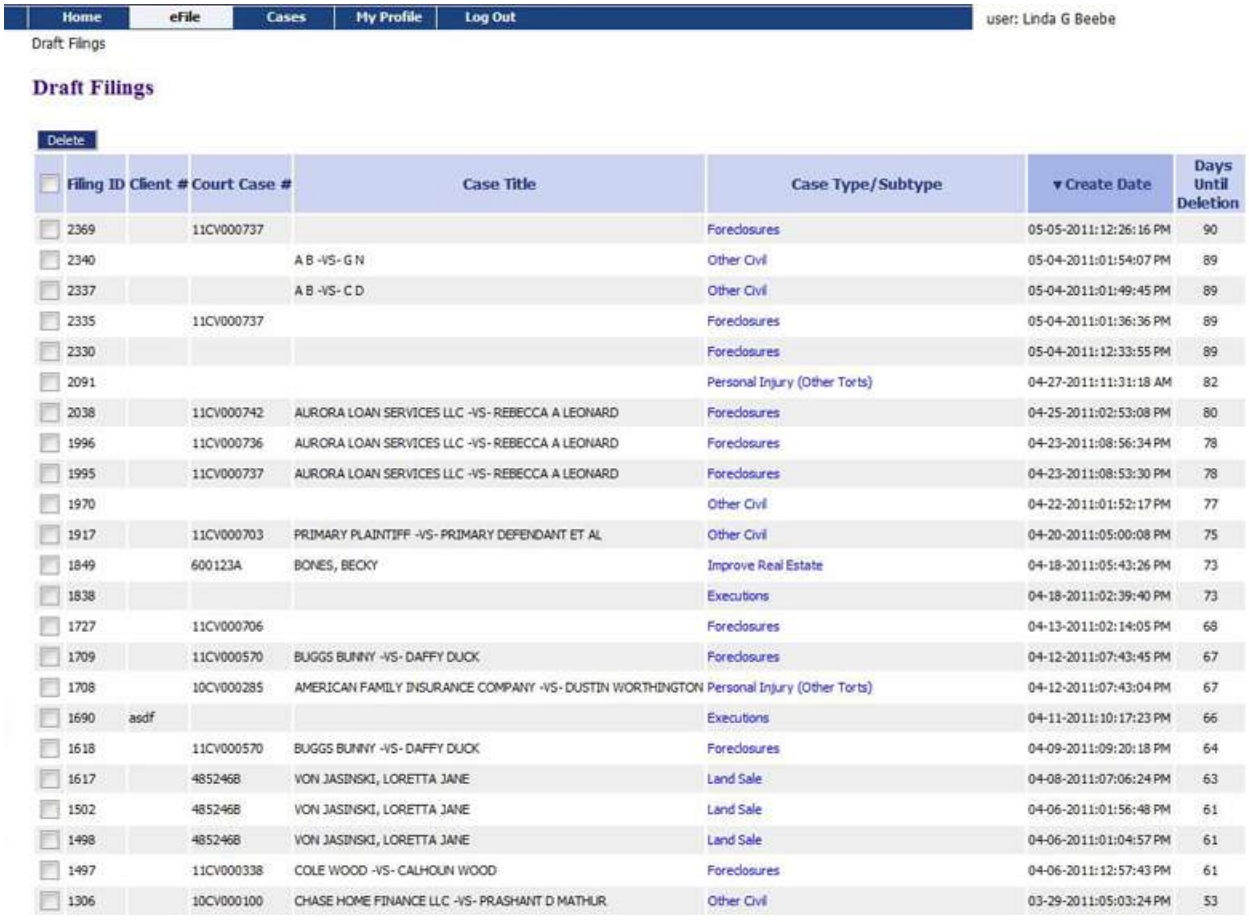
Draft Submissions

The "Draft" feature acts as a backup if you are disconnected from the internet. Whenever you begin creating a new submission, eFlex records data each time you advance to the next screen, including any document data you have loaded. If your internet connection goes down, the system creates a draft of your submission. When you're back online, you can continue the process where you left off. Each time you log out, you will be prompted if you have any partially completed submissions.

To resume work on a draft filing:

1. Click **e-File** > **Draft Filings** on the menu bar to see a list of partially completed submissions.

Figure 54: List of Draft Filings



Filing ID	Client #	Court Case #	Case Title	Case Type/Subtype	▼Create Date	Days Until Deletion
2369		11CV000737		Foreclosures	05-05-2011:12:26:16 PM	90
2340			A B -VS- G N	Other Civil	05-04-2011:01:54:07 PM	89
2337			A B -VS- C D	Other Civil	05-04-2011:01:49:45 PM	89
2335		11CV000737		Foreclosures	05-04-2011:01:36:36 PM	89
2330				Foreclosures	05-04-2011:12:33:55 PM	89
2091				Personal Injury (Other Torts)	04-27-2011:11:31:18 AM	82
2038		11CV000742	AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	Foreclosures	04-25-2011:02:53:08 PM	80
1996		11CV000736	AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	Foreclosures	04-23-2011:08:56:34 PM	78
1995		11CV000737	AURORA LOAN SERVICES LLC -VS- REBECCA A LEONARD	Foreclosures	04-23-2011:08:53:30 PM	78
1970				Other Civil	04-22-2011:01:52:17 PM	77
1917		11CV000703	PRIMARY PLAINTIFF -VS- PRIMARY DEFENDANT ET AL	Other Civil	04-20-2011:05:00:08 PM	75
1849		600123A	BONES, BECKY	Improve Real Estate	04-18-2011:05:43:26 PM	73
1838				Executions	04-18-2011:02:39:40 PM	73
1727		11CV000706		Foreclosures	04-13-2011:02:14:05 PM	68
1709		11CV000570	BUGGS BUNNY -VS- DAFFY DUCK	Foreclosures	04-12-2011:07:43:45 PM	67
1708		10CV000285	AMERICAN FAMILY INSURANCE COMPANY -VS- DUSTIN WORTHINGTON	Personal Injury (Other Torts)	04-12-2011:07:43:04 PM	67
1690	asdf			Executions	04-11-2011:10:17:23 PM	66
1618		11CV000570	BUGGS BUNNY -VS- DAFFY DUCK	Foreclosures	04-09-2011:09:20:18 PM	64
1617		485246B	VON JASINSKI, LORETTA JANE	Land Sale	04-08-2011:07:06:24 PM	63
1502		485246B	VON JASINSKI, LORETTA JANE	Land Sale	04-06-2011:01:56:48 PM	61
1498		485246B	VON JASINSKI, LORETTA JANE	Land Sale	04-06-2011:01:04:57 PM	61
1497		11CV000338	COLE WOOD -VS- CALHOUN WOOD	Foreclosures	04-06-2011:12:57:43 PM	61
1306		10CV000100	CHASE HOME FINANCE LLC -VS- PRASHANT D MATHUR	Other Civil	03-29-2011:05:03:24 PM	53

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2. Click the "Case Type/Subtype" name to return to the last page you worked on.

3. Continue with the submission. For most submissions the default is to go to the "Add a Document" page. If you need to back up to the "Case Initiation" page on some submissions, press the **Back** button on the "Add a Document" page.

Many times filers forget they already redid the submission. You can delete entries if you no longer need the information or if you completed the submission by starting over. Each time you log off the e-Filing system, if there are entries in draft status, you will be notified that you have entries in draft, and you will have to answer whether you want to exit or not.

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Appendix A: Creating a PDF and Other Document Display Information

PDF Basics

PDF (Portable Document Format) is a popular format created by Adobe Systems Incorporated. Documents using this format can be read by Adobe Reader®, a free application available from the Adobe website. This type of document is considered a final form document because it is not designed to be edited. It is fixed and appears the same on nearly every machine using Adobe Reader. Because the document looks the same regardless of the machine, EDMS policy is to send documents as PDF documents except for "Proposed Orders." A PDF document has the extension ".pdf" appended to the file name.

If you have a PDF printer driver installed, you can create PDF documents directly from Microsoft® Word. Some word processing applications, such as Corel® WordPerfect®, include a PDF printer driver as part of the application. There are several vendors that sell PDF printer drivers.

Creating Documents

All documents except "Proposed Orders" will need to be submitted as a PDF file.

For "Proposed Orders" you should prepare these documents in a word processor and submit them in one of the following formats:

- Microsoft Word 2007 (.docx)
- Microsoft Word 98 - 2003 (.doc)
- Rich Text Format (.rtf)
- WordPerfect 6 – 12 (.wpd)

To create your original documents, whether "Proposed Orders" or another document, you'll need a word processing application, such as Microsoft Word, WordPerfect, or another word processor. You need to use standard fonts when you are creating the original document. Times New Roman or Arial fonts are common and generally convert to PDF consistently. The font you select also needs to be a "TrueType" font. Selecting standard fonts will help ensure the document formatting converts correctly.

Note: All documents eventually will be converted to a PDF file. "Proposed Orders" submitted in a word processing format will be converted by the court later in the e-Filing process.

Except for "Proposed Orders," after you create your document, you need to convert it from the word processing format to Adobe PDF file.

Microsoft Word 2007 has an Acrobat tab on the right side of the menu bar. When you have your original document file opened, the "Create PDF" will allow you to save a copy of the document as a PDF. Many users of other word processing programs will install a PDF printer driver as that is the common way to create PDF documents. There are some free PDF printer drivers as well as products you can purchase. Adobe Acrobat Standard or Pro editions include printer drivers. It doesn't matter what operating system

or word processing application you use to create your original document as long as you can convert the finished document to a PDF document.

Including Paper Exhibits

With your submission you may need to include copies of paper documents such as a copy of a contract, a copy of a bounced check, or some other item. You must scan these types of paper exhibits into PDF to e-File them. To do this you must have access to a scanner. In your scanner control dialog box, be sure to select the "Scan to PDF" option.

Pay attention to court requirements for file size, color, and resolution. The Court EDMS system requests that you use black-and-white settings with a low resolution (300 dpi) resulting in 25 to 50 KB per page in size. Using color adds to the size of the file, so you should only scan using color settings when color is a vital element of the exhibit. If your scan includes color, and then lower the resolution enough to reduce the file size but not to destroy the ability to view the image. See your scanner's user documentation for more information.

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Appendix B: Dealing with Large Documents

The court has established a 30 MB limit for each document. Generally, a 200 page document printed from your word processor to a PDF document in black and white will be about 2 MB if the document does not have any images, such as pictures or graphs.

When your document is too large, you need to break the document down. As part of the submission you will include the primary document first. Then add the additional documents you split up as separate documents using the **Attach Document** option.

In your word processing application, if you have a PDF printer driver, select that printer. In the printer dialog, you can tell the printer what pages you want printed. Select the range of pages you want to print and name the document appropriately. For example, if you are printing the first 250 pages, you may want to call that document the "Motion Part One.pdf." From your application select the PDF printer again, and identify in the printer dialog the next range of pages such as 251 to 500. Name the document "Motion Part Two.pdf." Continue this until you have printed all the sections of your documents.

When you are submitting the document you have broken into parts, you will add them on the "Add a Document" page.

Figure A: Adding Large Document as Multiple Documents

1. Select a category from the "Document Category" drop-down list.
2. From the "Document Type" pull-down menu select the type of document you are going to add to this submission for the original document.
3. In the "Additional Text" identify that this is "Part One" of the document.
4. Check the appropriate boxes associated with this document.
5. Locate "Part One" of the document you have prepared by clicking on the **Browse**. The operating system "Open Dialog" will display. Browse to locate your document, select the document, and click on the **Open** button. This will return you to the "Add a Document" page with the file path to your document displayed in the "Document Location" field.
6. Click the **Add** button. If the document is large, you will see a message "UPLOADING DOCUMENT. PLEASE WAIT." This process will copy the document from your local machine to the Court Judicial Branch servers.
7. Each time you add a document, the document entry is displayed in the lower section of the "Add a Document" page as shown in Figure 44. The picture above shows that an "Original Notice" was added with no additional text. The size of the document is also included on the entry.

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8. Once the transfer is complete select "Attachments" in the "Document Category." This will only allow one type of document to display in the "Document Type" pull-down list. If the "Document Type" is blank select the "Document Type of Attachment."

9. Locate "Part Two" of the document you have prepared by clicking on the **Browse**. The operating system "Open Dialog" will display. Browse to locate your document, select the document, and click on the **Open** button. This will return you to the "Add a Document" page with the file path to your document displayed in the "Document Location" field.

10. Click the **Add** button.

11. A page will display that asks you what document this is associated with. If there is only one lead document, it will be automatically selected. If there is more than one lead document, you must identify which document the attachment is associated with by clicking the appropriate radio button.

Figure B: Add an Attachment to a Document

12. Click the **Next** button on this screen. If the document is large, you will see a message "UPLOADING DOCUMENT. PLEASE WAIT." This process will copy the document from your local machine to the Court Judicial Branch servers.

13. Each time you add an attachment, the document entry is displayed in the lower section of the page under the document you associated the attachment with. The listing is indented slightly, marked by a dash, and labeled "Attachment."

Figure C: Attachment Submitted

14. Repeat steps 8 through 13 for each portion of the document you broke down until you have completed loading all of the documents.

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