filetime

FileTime Administrators' eFiling Guide

This guide provides you detailed instructions on how to manage your firm's/company's filers, eFilings, eServices, and more.

It also provides a primer on how the eFiling Manager eService system works.

If you have questions about how to do something for your firm eFiling account or for your firm filers you will probably find the answer here.

Revised 2/9/2017

Table of Contents

1.	Overview of the Firm eFiling Admin Functions 1	
	A. Role of the Firm eFiling Admin1	
	B. Design of the eFiling Manager System1	
	C. eFilings2	
	D. eServices	
2.	FileTime Overview	5
	A. Top Navigation Bar	
	B. Workspace Sub-Navigation Bar	
	C. Admin Sub-Navigation Bar8	
	D. My Account Sub-Navigation Bar	
	E. Training Sub-Navigation Bar16	
	F. Submit Filing(s)	
3.	Administering Firm Users 19)
	A. Update Users from eFiling Manager	
	B. Make All Registered Attorneys available to accept eService	
	C. Register Firm Users	
	D. Approve Users	
	E. User Roles	
	F. Registration	
	G. Status	
	H. Update Filer Information	
	I. Update Filer Email Address	
	J. Update Filer Roles	
	K. Update Button	
	L. Users Actions	
4.	Registering Firm Members	
	A. Set Up a Firm Account and Register Yourself	
	B. Allow Users to self register for this account	
	C. Register Users from the Admin Section	
5	D. Complete the Activation Process	,
5.	Manage Your Firm's eFiling Users	3
	A. Update User Information	
	B. Update a User's Email Address	
	D. Unlock Filer Account	
	E. Resend the Registration Activation Email	
	F. Delete Firm Users	
6.	Manage Your Firm's Service Contacts	
0.	A. General Information about Service Contacts	
	B. Adding Service Contacts to a Case	
	C. Remove Service Contacts from a Case	
	D. Managing Non-Firm Service Contacts	
7.	Managing eFiling and eService Notification eMails	-
	A. Direct Emails to Other Staff Members	-
	B. Direct eService Emails to Additional Firm Staff Member	-
	C. Add Additional eService Notification eMail Recipients	
	D. Customize the eService Notification Copies List	



	E. Select to Not Receive Specific Notification Emails	
	F. Add Recipients for all the eFiling Manager and FileTime Notifica	tion Emails to You 40
	G. Redirect Notification Emails to Avoid the User's Inbox	
8.	Generating Reports	41
	A. Accessing the Reports Feature	
	B. eFiling Reports	
	C. eServices Reports	
	D. Alerts Reports	61
	E. Failed Filings	
9.	Navigating and Customizing Your Views	
	A. Firm/Personal Filter	
	B. Sorting Grid Columns	67
	C. Customizing Grid Columns	67
	D. Searching in Grids	67
	E. Drill Down	
	F. Grid Navigator	
10	eFile Notification Emails	71
	A. Registration Emails	71
	B. eFiling Manager eFiling Notifications	72
	C. eFiling Manager eService Notification eMails	
	D. FileTime Registration eMail	
	E. FileTime eFiling Notification eMails	
	F. FileTime eService Notification Emails	
	G. FileTime Fax Service Notifications	
11	Archiving/Reactivating Cases	
	A. Archive a Case/Submission/Filing	
	B. Access an Archived Case	
	C. Reactivate an Archived Case	
12	. Getting Assistance and Giving Feedback	
	A. Training	
	B. Video Training	
	C. Manuals	
	D. Contact Us	
	E. Knowledge Base	
	F. Feedback	



Page ii

Chapter 1

I. Overview of the Firm eFiling Admin Functions

A. Role of the Firm eFiling Admin

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

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

B. Design of the eFiling Manager System

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



Figure 1-1, The Design and Flow of the eFiling Manager System

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

You next enter the filing and/or eService information.

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



C. eFilings

eFiling Manager:

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

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

When a filing is accepted, eFiling Manager then:

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

Notifies FileTime, and

Sends the Notification of Acceptance email to the filer.

D. eServices

The flow of an eService is slightly different.

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

Manager then:

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





Chapter 2

II. FileTime Overview

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

	A WORKSPACE	ADMIN	MY ACCOUNT	TRAINING	SUBMIT	FILING(S)			
в	Dashboard	Submit Filing(s)	Cases	Submissions	Filings	Services ~	Drafts	Templates ~	Alert(s) 4
								_	

Figure 2-1. Top Navigation Bar

A. Top Navigation Bar

1. Workspace

Clicking the **Workspace** button returns you to the area from which you can eFile and eServe and manage all your eFilings and eServices. When clicked on **Workspace** you have access to all the functionalities described below for the Workspace Sub-Navigation bar (section B) below.

2. Admin

This button is visible only to persons designated as a firm eFiling administrator. Clicking this button takes you to the Firm Admin area (section **C** below).

3. My Account

Click this button when you need to change your password, change your name in the eFiling system, optin to the Public Service Contact List, or update which notification emails you receive from us. See section **D** below for more information about this section.

4. Training

We provide several training options. Click this button to view our training options (<u>section E</u> <u>below</u>).

5. Submit Filing(s)

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

B. Workspace Sub-Navigation Bar

You will be automatically taken to this sub-menu when you login.

1. Submit Filing(s)

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

2. Cases

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

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



Lis	t o	f Cases					
Searc	n Case	es					
🕀 Sı	bmit N	lew Case Filing					
Castr	Coun	ty - District Clerk	- Required		Go		Advanced Search
							17 V
My Ca My Ca			•				
Firm (Archiv	ases ed Cas	ses					Case Details
Drag a	colum	nn header and drop it here to	group by that column				View Case Details
		Client ID ~	Case Number v	Jurisdiction ~			view Gase Details
		•	•	•		Bookmark	
•	*	Mary	123456	Castro County - District	Refresh File Archive	Case Details	
				Clerk		Client ID:	Mary
	Ca	se Information Submissio	ons Service Contacts eSe	ervice Notifications Service	Contact History eService Inbox C	Case Number:	123456
0			123456	Cass County - District Clerk	Refresh File Archive	Style:	
0		jenifer	201007044	Harris County - 270th Civil	Refresh File Archive	Jurisdiction:	Castro County - District Clerk
live c	hat	3. TR 2.4 (1)4	na posta antina. Primpinante	District Court		Attorney:	Jenifer Malik

Figure 2-3, Cases Page

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

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

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

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

3. Submissions

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





WC	RKSPACE	ADMIN	MY ACCO	UNT	TRAINING	SUBMIT	FILING(S)									
Dasht	board Su	ubmit Filing	(s) Case	s Si	ubmissions	Filings	Services ~	Drafts	Template	is v 🕐	lert(s) 4					
Su	bmiss	sions		Cr.		h						-6				
	Submit New (ch Submiss															
					17											
Subi	mission ID/Cl	lient ID/Ca	se Number		Go											
	mission ID/Cl Gubmissions	lient ID/Ca	se Number	•												
My S	Submissions														Submission Details	
My S	Submissions	eader and d		group b					~	Style	~					
My S	Submissions a column he	eader and d	frop it here to	group b	y that column Description				Ŷ	Style	Ŷ			Refrest		
My S	Submissions a column he	eader and d	frop it here to	group b	y that column Description					Style		Archive		Refrest		
My S Drag	Submissions a column he Date	eader and d	fropithereto CaseNumbe	group b	y that column Description					Style		Archive	Submission ID	Refrest	h Proof Of Submission	

Figure 2-4, Submissions Page

4. Filings

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

,101	RKSPACE	ADMI	N MYA	CCOUNT	TRAINING	S	UBMIT FILING	(S)								
Dashb	oard	Submit Fili	ng(s) (Cases	Submissions	Fil	lings Servic	ces ∽ D	rafts	Templates ~	Alert(s) 4)				
Fil	ings	E							ł		-	-8			-	100
Searc	ch Filings															
Clien	t ID/Case	Number/S	ubmission I	D	Go											
My Fi	ilinas															
	lingo				*											
		header and	l drop it her	re to grou	p by that column	n										Filing Details
			l drop it her Date	re to grouj ~	p by that colum		Description		~	Jurisdiction	~					Filing Details
	a column I				p by that column Case Number		Description		Ý	Jurisdiction	Ŷ				Retry	Filing Details New Filing Details
	a column I	on Id 🗸		~	p by that column Case Number	r v	Description Paternity			Jurisdiction	9	Archive	•	Status:		
Drag	a column I Submissie	on Id 🗸	Date	~	p by that column	r v				Castro County -	© District Clerk	Archive	•	Submission ID:		View Filing Details cancelled 161350
Drag •	a column I Submissio 161350 160963	on Id 🗸	Date 01/05/17 12/20/16	~	p by that column Case Number	r ~	Paternity Petition			Castro County - Bexar County -	District Clerk District Clerk	Archive	•	Submission ID: Submit Time:		View Filing Details
Drag	a column I Submissio	on Id 🗸	Date 01/05/17	~	p by that column	r ~	Paternity	digency		Castro County -	District Clerk District Clerk		•	Submission ID:		View Filing Details cancelled 161350

Figure 2-5, Filings Page

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

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

5. Services

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

filetime

Page 5

WORKSPACE AD	MIN MY ACCOUNT	training sl	JBMIT FILING(S)					
ashboard Submit	Filing(s) Cases	Submissions Filir	ngs Services - Draft:	s Templates 🗸 🗛	lert(s) 4			
Service - I	nbox		Inbox eService Outbox Fax Service Outbox	de				
Search Services			eServices Search	¢.				
Case Number		Go						
My Services		·•						
	nd drop it here to group by							eService Details
	nd drop it here to group by Jurisdiction		 From 	Attorney/Filer		*		eService Details
Drag a column header a			From	-		×		
Drag a column header a Case Number ~	Jurisdiction	y that column	The second sec				Status:	e Service Details
Drag a column header a Case Number v	Jurisdiction Bexar County - District C	y that column Clerk		-			Status: Served Date:	
Drag a column header a Case Number ~ 2016Cl31245	Jurisdiction	y that column Sterk Zierk	The Gellar Firm	Uncle Buck				Opened
Drag a column header a Case Number ~ 2016Cl31245 2016Cl31245	Jurisdiction Bexar County - District C Bexar County - District C	Yerk Zerk Clerk Clerk	The Gellar Firm The Gellar Firm	Uncle Buck Uncle Buck			Served Date:	Opened 11/23/16 03:54 PM CST

Figure 2-6, Services Section

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

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

6. Drafts

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

WORKSPACE ADMIN	MY ACCOUNT	TRAINING	SUBMIT	f Filing(S)				
shboard Submit Filing(s)	Cases	Submissions	Filings	Services v Drafts Ten	nplates ~ Alert(s))		
Drafts			h			-	-	-
Submit New Filing(s)								
A. Davida								
wy Draits	•							
	•							Draft Details
My Drafts Drafts Drag a column header and drog		p by that column					Created:	Draft Details 01/25/17 02:35 PM CST
Drafts Drag a column header and drop		p by that column	v	Jurisdiction	✓ Style	~	Created: For:	
Drafts Drag a column header and drop) it here to grou	p by that column	Ý		✓ Style	·		01/25/17 02:35 PM CST
Drafts	there to grou						For:	01/25/17 02:35 PM CST Jenifer Malik
Drafts Drag a column header and drop Saved Date	o it here to grou ~ Cause ()						For: By: Filing: Answer/Contest/F	01/25/17 02:35 PM CST Jenifer Malik Jenifer s Malik
Drafts Drag a column header and drop Saved Date 01/125/17 CST	o it here to grou ~ Cause ()			Bexar County - District Clerk			For: By: Filing:	01/25/17 02:35 PM CST Jenifer Malik Jenifer s Malik

Figure 2-7, Drafts

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



7. Templates

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

WORKSPACE ADMIN MY ACCOUN	t training	SUBMIT FILING(S)							
Dashboard Submit Filing(s) Cases	Submissions	Filings Services ~ Dra	fts Templa	ates ~	Alert(s))			
List of Case Templa	tes			Templates Party Temp	late			-	4:38
Submit New Case Filing				1	O Add Ne	w Case Temp	plate		
Case List									Case Template Details
Drag a column header and drop it here to gro	up by that column								
Template Name	 Location 		~					Case Template Detail	
								Template Name:	Jenifer
	•		•					Template Desc:	hb vs df
Jenifer	Bexar Co	ounty - District Clerk		Edit	View	Submit	*	Jurisdiction:	Bexar County - District Clerk
Hp vs Dell	Bexar Co	ounty - District Clerk		Edit	View	Submit		Attorney:	Jenifer Malik

Figure 2-8, Templates Section

- **Case Templates** This function enables you to use a Case Template created by your Admin team to start a new submission.
- Case Party Templates You and/or your firm members can create templates containing the names and addresses of parties your firm often represents. In this section, you can add new case party templates and edit existing templates.

8. Alerts

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

WORKSPACE ADMIN	MY ACC	DUNT	TRAINING	3	SUBMIT FILIN	G(S)								
Dashboard Submit Filing	(s) Case	es	Submissions	ł	Filings Sen	/ices `	Drafts	Templates ~	Alert(s) 4					
Alerts Mana	ger				1	I			-					-62
My Alerts					•									
Returned for Correction	on by Cler	k												Dismiss All
Drag a column header and	lrop it here to	group	by that colun	nn										
Submission Id	~ Date	·~ (Client ID	~ (Case Number	~ 0	lient	~	Jurisdiction	~	Attor	ney	~	
	•	•	¢	•	(•		•		T			۲	
160269	12/14/ CST	16 j	enifer	2	2016CI10256	n	iary j		Bexar Count	y - District Clerk	Jenife	er Malik		Resubmit Dismiss Clerk Notes

Figure 2-9, Alerts Manager

Page 7

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



C. Admin Sub-Navigation Bar

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

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



Figure 2-10, Admin Sub-Navigation Bar

1. Firm Users

Manage all your firm users on the **Firm Users** page (Figure 2-11). You can add new users, opt your firm attorneys into the eFiling Manager Public Service Contact List, update user names, inactivate users from your firm account, assign a role of firm manager to additional registered firm staff, change user passwords, change users' email address in the eFiling Manager system, and more in this area.

												⊕ Add	User	User Information
rag a column	head	der and drop it her	re to g	group by that	colu	mn								
First Name	~	Middle Name	~	Last Name	~	Email Address	~	Roles	~	Registration	~	Status	~	First Name
	•		•		•		•	(•		•		•	James
lames			,	Rob		jamiexyz@mailin		Filer		Active	_	Approved	^	Middle Name
Jenifer		s		Malik		malik.jenifer@ma	a	Filer/Admin/Attorn	ey	Active		Approved		
														Last Name
														Rob
														Email Address
														jamiexyz@mailinator.com
														Confirm Email Address
														jamiexyz@mailinator.com
														✓ Filer
														Admin

Figure 2-11, Firm Users

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

2. Firm Info

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

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



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

Firm Information		
Please complete the following to update your firm account with FileTin	ne.	
Firm Name		
ABC Associates		
Country		
United States	-	
Address1		Address2
18600 US N 281		
City		Zip
San Antonio		78258
State:		Phone Number
Texas	*	(675) 675-4445
Firm Options:		
Make this account Texas sales tax exempt		
 Allow Users to self register for this account 		
Make Client ID required.		
Save Changes Cancel		

Figure 2-12, Firm Information Page

3. Payment Accounts

You must create at least one firm **Payment Account** (Figure 2-13) in order for your firm members to be able to eFile. However, you can create as many as needed. You can use a credit card or debit card for each Payment Account.

Creating a **Waiver Payment Account** allows your filers to submit filings for indigent and other no-fee cases you have.



Payment A	Accounts
-----------	----------

Add New Payr	nent	Account					
rag a column hea	ader a	and drop it here to gro	oup by t	hat column			
Account Name	×.	Туре	~	Card Type ~	Last 4 Digits ~	Expiry ~	
	T		\odot	•		•	
BC		CreditCard		MASTERCARD	5454	5/2018	Delete
Vaiver		Waiver					Delete
lenier		CreditCard		MASTERCARD	5454	5/2018	Delete

Figure 2-13, Payment Accounts Page

4. Firm Fee

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

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

Firm Fee Information

Basic Plan - FREE	Gold Plan - \$2.99 per Submission	Platinum Plan* - \$3.99 per Submission
Extended file-stamped document storage	All features of the Basic Plan	All features of the Basic and Gold Plans
eService Inbox - second way to retrieve service documents	Convert nearly any document to text-searchable PDF	Monthly Invoicing for firm filings
Export firm filing data	FREE Fax Service -100 pages per submission	FREE Fax Service - unlimited pages per submission
Proofs of Filing/eService/Fax Service	Automatically merge PDF files	Convert Word Processor Files to searchable PDFs
24X7, Knowledgeable Customer Support	Auto-correct PDF size & orientation	Automatically merge PDF files
Robust reporting	Extended file-stamped document storage	Auto-correct PDF size & orientation
		Extended file-stamped document storage

The Platinum Plan requires a credit report (business or personal) and billing agreement to become effective. Any changes up to the Platinum Plan or down from the Platinum Plan are effective the first day the change.

5. Firm Contacts

Figure 2-14, Firm Fee

This **Firm Contacts** page (Figure 2-15) is purely optional. By entering your firm's main Administration, IT, and Accounting contacts in this area you enable us to quickly contact the correct person in your firm if any issues arise.



Page 10

Contacts List					Add Contact		ntact Details
)rag a column header ar	nd drop it here to	group by that column				Make any changes to the info Changes button.	rmation below and click the Save
Full Name	~	Phone Number	~	Firm Contact Type	~		
	$\overline{\mathbf{v}}$		$\overline{\mathbf{v}}$		* ()		
ABCd		(555) 555-5555		Administration	<u> </u>	Full Name	Phone Number
John		(786) 576-8768		IT		ABCd	(555) 555-5555
						Firm Contact Type	Email Address
						Administration	 abc@maillinator.com
						Check any Notifications you v	vant to receive.
						Receive Notification of F	iling Submissions Emails
						Receive Notification of A	-

Figure 2-15, Firm Contacts

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

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

6. Service Contacts

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

wo	RKSPACE ADMIN	MY ACCOUNT	TRAINING S	SUBMIT FIL	NG(S)					
Firm U	Jsers Firm Info	Payments Accounts	Firm Fee	Firm Cont	cts Services ~	 Attorneys 	Reports ~	Case Templates		
Se	rvice Con	tacts		1		- ice Contacts Service Contact	ts			3:13
Co	ntacts List							Add Contact		Contact Details information below and click the Save
Drag	a column header and o	drop it here to group b	y that column						Changes button.	Information below and click the Save
	Email Address			~	ull Name			~		
				•				T	First Name	Middle Name
•	gm@mailinator.com				alileo Martinez			*	Galileo	
0	hm@bell.cim			3	arem belll				Last Name	Email Address
0	jamiexyz@mailinator	com			ames Rob				Martinez	gm@mailinator.com
0	jeniferjen@mailinato	r.com			enifer Jenifer				Administrative Copy	
0	malik.jenifer@mailina	ator.com			enifer s Malik				Administrative Copy	
0	johnsmith@mailinato	r.com			ohn SMith					
0	joseph.martin@maili	nator.com			seph martinez				Save Changes	Delete Contact
_	n@mailination o	om			aron Vogh					

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

• Firm Service Contacts - In this section you should enter the names of all firm attorneys and staff that will be designated to receive eService from counsel. On this page, you can also add attorneys and staff members (if desired) to the eFiling Manager Public Service Contact List. Names entered here will automatically populate the Service Contact selection list when a filer is submitting a filing and searching to add firm service contacts to the case.



• Non-Firm Service Contacts - In this section you will be able to add and manage counsel from other firms, or pro se filers, when you have an email address for that person and that counsel was not opted in to receive eServices for cases.

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

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

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

7. Attorneys

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

WORKSPACE ADMIN	MY ACCOUNT	TRAINING	SUBMIT	FILING(S))								
Firm Users Firm Info	Payments Accounts	Firm Fee	Firm C	Contacts	Services ~	Attorneys	Reports ~	Case Templates					
Firm Attorne	eys		i.				-					200	
Attorneys								Add Attorney			Attorne	y Details	
Drag a column header and	drop it here to group by	that column											
Full Name			~	Bar Numbe	er			~		First Name		Middle Name	
			T					۲		Carter			
Carter Bush			3	24056017					-	Last Name		Bar Number	
Jenifer s Malik			3	2 <mark>4</mark> 056017						Bush		24056017	
										Save Changes		Delete	Attorney

Figure 2-17, Firm Attorneys

8. Reports

The **Reports** feature (Figure 2-18) contains many different report types you can run, whether it be to assist in billing, to check on submissions/filing for a specific case, check on submissions by a specific staff member, etc.

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

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



eFil	ing Reports		Index
	Select the eFiling report you	want to generate	
× [Quick Overview Report		
20	Design Your Report Credit Card Reconciliation Report		
> 1	Accepted Submissions Report		
20	Individual Filing Report		
× 4	Export Report Generator		

Figure 2-18, Reports

Learn more about the reports in Chapter 8.

9. Case Templates

The **Case Templates** feature (Figure 2-19) enables your firm eFiling Administrator to create and edit case templates to be used by staff to file in new cases. The template saves the filer time because the template data is defaulted into the new case filing.

Case Temp	plates						-
Case List			Add	New Case Temp	late		Case Template Details
Drag a column header :	and drop it here to group by that column					Case Template Detail	s
Template Name v	Location ~	Payment Account ~				Template Name:	Jenifer
9	•	9				Template Desc:	hb vs df
Jenifer	Bexar County - District Clerk	ABC	Edit	Delete	-	Jurisdiction:	Bexar County - District Clerk
Hp vs Dell	Bexar County - District Clerk	ABC	Edit	Delete		Attorney:	Jenifer Malik
and Bernard States						Client:	rgg jhuu

Figure 2-19, Case Templates

D. My Account Sub-Navigation Bar

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

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



WORKSPACE	ADMIN	MY ACCOUNT	TRAINING	SUBMIT FILING(S)
Personal Info		Preferences ~ Ch		

Figure 2-20, My Account Sub-Navigation Bar

1. Personal Info:

Go to the Personal Info page (Figure 2-21) to update your name, opt in to be added to the eFiling Manager Public Service Contact List.

My Information			
First Name	Middle Name	Last Name	
Jay		Richardson	
Email Address	Confirm Email Address		
Jgrichardson72@gmail.com	Jgrichardson72@gmail.com		
I am an Attorney Bar Number	Show Dashboard		
99999999			
Update Cancel	Figure 2-21, Personal	Info	1
Update Cancel	Figure 2-21, Personal	Info	1
Update Cancel	Figure 2-21, Personal	Info	11
Update Cancel	Figure 2-21, Personal	Info	11
Update Cancel	Figure 2-21, Personal	Info	111
Update Cancel	Figure 2-21, Personal	Info	111
Update Cancel	Figure 2-21, Personal	Info	1111
Update Cancel	Figure 2-21, Personal	Info	1 1 1 1



Page 13

2. Notification Preferences

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

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

You can also click on Administrative copies to add additional recipients for the other eFiling Manager and FileTime notifications emails (other than eService notification emails).

	nge Password			
Service Notification (Copies		in the second	
names and email addresses below of additional	firm staff to whom you want c	opies sent of any eSer	rvice Notification emails delivered t	o your email addres
Add New Recipient				
ig a column header and drop it here to group by	that column Email Address			
ame	Email Address	•		
nifer Malik	malik.jenifer@mailinator.com		Q F P V D I H	*
	11	I	⊘ Edit × Delete	_
ames Rob	jamiexyz@mailinator.com		⊘ Edit × Delete	
hawn Malik	shawn@mailinator.com		⊘ Edit × Delete	
dministrative Copies			-	
			and the second	and the second
at the second second second second	and halve and a state of the set	161 11 - 6 11 - 6		
this feature to send, to the email addresses you	add below, copies of the not	ification emails for you	U29	
Add New Recipient				
g a column header and drop it here to group by	that column			
nail Id				
	۲			
lik.jenifer@mailinator.com		⊘ Edit × Delete	9	
ifer@mailinator.com		⊘ Edit X Delete	3	
nifer@mailinator.com		⊘ Edit X Delete	3	
nifer@mailinator.com		⊘ Edit X Delete	3	
@hu.com		⊘ Edit X Delete	9	
Aanage Notificatio	n Emails			
check any notifications you don't want to	receive.			
rm Admin Reports from FileTim	A			
Firm Submissions Waiting on Clerk Revie				
Firm Submissions Returned by the Clerk				
Were Manager Martin attack				
iling Manager Notifications	Illing Datums I for Com	Han		
Elling Assessed	Filing Returned for Correc Service Undeliverable	uon		
Filing Submitted				
Filing Submitted Filing Submitted Filing Submission Failed Filing Submitted Filing Submitted Filing Submitted	ng Accepted			
Filing Submitted Filing Submitsion Failed Ie Time Notifications Filing Submitted Filing Submitted	ng Accepted ng Returned for Correctio	n		
Filing Submitted Filing Submitsion Failed Ie Time Notifications Filing Submitted Filing Submitted	•	n		

filetime

Page 15

3. Change Password

The **Change Password** page (Figure 2-23) is where you go to change your password. This is especially important to do if you or we had eFiling Manager manually update your password because the automated **Forgot Password** function did not work correctly for you.

Current Password	Required	
New Password	Required	
Confirm Password	Required	

Figure 2-23, Change Password

E. Training Sub-Navigation Bar

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

Personal Info	Notification	Preferences ~ C	hange Password	4
Personal milo	Notification	Fielelelices • C	nange Fassword	,
	Figure	2-24, Training Su	ub- Navigation	Bar
				N/1 1
				11



1. Training Videos

The Training Guides page (Figure 2-25) enables you to access our Written Guides

filetine	FEATURES - BENEFITS PRICING FAC'S	TRAINING ~ Training Guides Videos Register For Training
	These guides provide you detailed how-to-do informat	AND REPORT OF A PROPERTY OF
Administrator Guide	My Account Guide	eFiling Guide
eService Guide	Administrator Reports Guide	Searchable PDF Guide
Non-Integrated Cases Guide		

Figure 2-25, Training Options

2. Register for Training

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

ICLE-Accred	lited eFiling Training)		
great deal of background ou learn the basics of eFi Date		tant rules and guidelines governing eFilin End Time	g and eservice. Receive one nour of with	CLE credit while
ou learn the basics of eFi	ling and eService		Register	

filetime



3. Videos

You can access all our training videos on the Videos page.



Figure 2-27, Training Videos

F. Submit Filing(s)

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



Chapter 3

III. Administering Firm Users

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

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

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

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

Update Users from	n eFiling Manager A								С	• Add	User		New User Request D Approve User
Drag a column hea	der and drop it here to group	by that column			Г								User Information
First Name 🗸	Middle Name ~	Last Name	 Email Add 	tress v	Roles	~	Registration		v s	Status	~		First Name J
			•			Y		(•		T	- I I	Cody
James		Rob	jamiexyz@	@mailinator.com	Filer		Active		Ap	pproved	*		Middle Name
Cody		Mosby	codymost	oy@mailinator.co	Filer		Unverified	F	Pe	ending	- E		widde ivanie
Jenifer		Malik	malik.jenif	er@mailinator.c	Filer/Admin/Attorney		Active	G	Ap	pproved			
Mary		Ко	maryko@	mailinator.com	Filer		Unverified	-	Pe	ending		- I I	Last Name Mosby
												K	Email Address codymosby@mailinator.com Confirm Email Address codymosby@mailinator.com Filer Admin L M Update Resend Activation Email N
live chat									_	_			Reset Password O Delete Filer P
				Fig	ure 3-1, Fi	rm	Users	Page					



Page 19

Here is a description of the functions on this page:

A. Update Users from eFiling Manager

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

B. Make All Registered Attorneys available to accept eService

Clicking this button will add all of your registered firm attorneys to the eFiling Manager Public Service Contact List. This will enable your firm attorneys to conform to the TRCP and TRAP that require an attorney to be available for eService in mandatory eFiling jurisdictions.

C. Register Firm Users

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

D. Approve Users

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

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

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

E. User Roles

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

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

F. Registration

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

1. Unverified

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

2. Active

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

G. Status

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



Page 20

1. Pending

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

2. Approved

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

H. Update Filer Information

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

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

I. Update Filer Email Address

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

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

J. Update Filer Roles

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

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

The three roles available in the system are:

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

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

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

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

K. Update Button

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

L. Users Actions

The buttons in this yellow-highlighted area will vary.



1. Resend Activation Email

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

2. Reset Password

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

3. Delete Filer

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



Chapter 4

IV. Registering Firm Members

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

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

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

A. Set Up a Firm Account and Register Yourself

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

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





Figure 4-2, Choose the Registration Option

1. Create a Firm Account

file**time**>>

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

2. Join an Existing Firm Account

Choose this option (Figure 4-2, B) to register yourself with an existing firm account. If you are not sure whether your firm has an eFiling account or not, choose this option first. If your firm

does not have an existing firm account this will become apparent to you during the registration process and you can choose instead the Create a Firm Account option.

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

3. As an Independent User

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

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

B. Allow Users to self-register for this account

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

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

Firm Information		the second se
irm Information		
Please complete the following to update your firm account with FileTime.		
im Name		
ABC Associates		
Country		
United States	•	
Address1		Address2
18600 US N 281		
City		Zip
San Antonio		78258
State:		Phone Number
Texas	*	(675) 675-4445
Firm Options:		
Make this account Texas sales tax exempt		
Allow Users to self register for this account		
Make Client ID required.		
Save Changes Cancel		

Figure 4-3, Allow Firm Staff to Self-Register

When a firm user registers him/herself the firm eFiling administrators will receive an <u>email</u> <u>alerting them to that fact</u>.

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



Page 24

Update Users fro Users	m eFiling Manager				С	O Add User		New User Request B Approve User
Drag a column hea	ader and drop it here to group i	by that column						
First Name 🗸 🗸	Middle Name ~	Last Name 🗸 🗸	Email Address v	Roles v	Registration	 Status 		First Name
		•	•	•		¥		Cody
James		Rob	jamiexyz@mailinator.com	Filer	Active	Approved	<u>~</u>	Middle Name
Cody		Mosby	codymosby@mailinator.co	Fler	Unverified	Pending A		
Jenifer		Malik	malik.jenifer@mailinator.c	Filer/Admin/Attomey	Active	Approved		
Mary		Ко	maryko@mailinator.com	Filer	Unverified	Pending		Last Name

Figure 4-4, Approve New Registrant

Login to FileTime and go to Admin > Firm Users.

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

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

C. Register Users from the Admin Section

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

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

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

D. Complete the Activation Process

The registration process is not complete until a new registrant:

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

1. Activate Account Emails

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

· User Self-Registered and created a password.

Subject: eFiling Manager.gov - New User Activation

Body:

You have been registered with eFiling Manager.gov. Please click on the link below to activate your account.

Activate Account

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



Page 25

• Firm Administrator Registered so no password was created

Subject: eFiling Manager.gov - New User Activation

Body:

You have been registered with eFiling Manager.gov. Please click on the link below to activate your account.

Activate Account

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

Password: **\$\$\$newpassword**

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

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

2. Login

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





Chapter 5

V. Manage Your Firm's eFiling Users

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

Update Users from	m eFiling Manager						
Users						O Add User	A User Information
Drag a column hea	ader and drop it here to group I	by that column					
First Name 🗸 🗸	Middle Name ~	Last Name 🗸	Email Address v	Roles ~	Registration ~	Status v	First Name
Y	•	T	Ŷ	Ý	•	•	James
James		Rob	jamiexyz@mailinator.com	Filer	Active	Approved	Middle Name
Cody		Mosby	codymosby@mailinator.co	Filer	Unverified	Approved	
Joseph		Martinez	jmartinez@mailinator.com	Filer	Unverified	Approved	Last Name
Jenifer		Malik	malik.jenifer@mailinator.c	Filer/Admin/Attomey	Active	Approved	Rob
Mary		Ко	maryko@mailinator.com	Filer	Unverified	Pending	Email Address
							jamiexyz@mailinator.com
							Confirm Email Address
							jamiexyz@mailinator.com
							✓ Filer
							Admin
							Attomey
							Update
							Reset Password B
							Delete Filer

Figure 5-1, Firm Users Page

A. Update User Information

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

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

B. Update a User's Email Address

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

Click on the name of the user on the **Firm Users** page to highlight it. Update that person's email address in the **User Information** section.

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

C. Resetting Passwords

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

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



D. Resend the Registration Activation Email

The registration process for a new user is not complete until the new user clicks the Activate Account in the <u>New User Activation email</u>.

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

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



Figure 5-3, Resend Activation Email

E. Delete Firm Users

When a user leaves your firm for any reason you can delete him/her from your firm account. Click on the name of the user on the **Firm Users** page to highlight it. Click the **Delete** button (Figure 5-1, C).

Deleting a firm user:

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



Page 29

Chapter 6

VI. Manage Your Firm's Service Contacts

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

A. General Information about Service Contacts

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

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

- a Service Contacts FileTime labels your own firm members as Service Contacts. Your service contacts will be eServed for the case the first time your firm adds them as a service contact for your firm. However, on future submissions by your firm in the case, FileTime suppresses eServices to your own firm service contacts so your team is not receiving eService Notification emails for your own eServices.
- b. eService Recipients FileTime labels service contacts for other case counsel as eService Recipients. They will receive eServices when your firm submits eServices for the case, unless your firm members specifically choose not eServe them.
- c. Non-Firm Service Contacts This is an attorney for another case party that your firm has added as a service contact for the case because that counsel has not made him/herself a service contact for the case and is not on the eFiling Manager Public Service Contact List, so can- not be added from that list. The Non-Firm Service Contact option is the final solution. Your firm members add that counsel, technically as a service contact under your firm, but add the correct firm name for the counsel to display.

1. Edit and Remove Service Contacts Added by Your Firm

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

A. Adding Service Contacts to a Case

Service Contacts are added to case in five different ways:

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



Page 30

Vam	ne	Email Add	ress	Firm	Name	Case Party					
	\bigtriangledown		\odot		\bigtriangledown		$\overline{\mathbf{v}}$				
Jones Scarlett		xyz@maill	inator.com	ABC Asso	ciates	N/A		Edit	Remo	Remove from Case	
		aaar@mai	linator.com	ABC Associates		Roger Ranch		Edit Remo		ove from Case	
				Asso	ciates	Kuyer Kanc	.11	С		Service Conta	
	vice Reci Name			Asso	ciates Firm Nam						
Ser	vice Reci		3	Asso				С			
Ser	vice Reci	pients [3	$\overline{\mathbf{v}}$		e	Case	С	Add		

Figure 6-1, eFiling Submission Service Contacts Page

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

- a. When other counsel for the case eFiled they could have added their firm service contacts for the case which now display under the eService Recipients area (Figure 6-1, B) when your firm members eFile into the case.
- b. Your firm members can find and add counsel from the eFiling Manager Public Service Contact List to a case. This only works, of course, if the other counsel has been added by their firm to the eFiling Manager Public Service Contact List. They would click the Add Counsel for eService button (Figure 6-1, F) button to do so.
- c. If counsel: (1) has not been added as a service contact for the case by his/her firm, (2) is not on the **Public Service Contact List**, and (3) you know his/her email address; your firm members may add that counsel as a **Non-Firm Service Contact**. They would click the **Add Non-Firm Service Contact** button (Figure 6-1, E) button to accomplish this.
- d. On the **Case** page (Figure 6-2) your firm filers can drill down in a case to get to the Service Contacts tab and there add and/or delete firm service contacts to the case.

•	Jenifer	201012345		Harris County - 6 District Court	i1st Civil Refre	sh File	Archive	
	Case Information S	ubmissions Servic	e Contacts eS	Service Notifications	Service Contact	History e	Service Inbox	C >
в	Attach Service Con	tact Attach Non-	A Firm Service Con	tact C				
	Drag a column heade	er and drop it here to	group by that col	-				
	Name ~	Email Address	Firm Name	~	Case Party	~		
	•		0	Ŧ		$\overline{\mathbf{v}}$		
	test test	test@abc.com	Bud Panjwan	i	A and A PETROLEU TEXAS INC BY SEF DIRECTOR ADNAN	WING ITS		^
	test test	test@abc.com	Bud Panjwan	i	WALLIS STATE BAI REM ONLY)	NK (IN		
						TANT		

Figure 6-2, Service Contacts on Cases Tab

On this page, you can:

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



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

A. Remove Service Contacts from a Case

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

- a. When your firm members are submitting filings, they can delete firm service contacts from the case.
- b. On the **Cases** page your firm administrators and filers can drill down in a case to get to the **Service Contacts** tab and delete firm service contacts to the case (Figure 6-2, B).
- c. You can view all cases to which a firm service contact is associated and selectively delete the service contacts from cases (Figure 6-3).

WORKSF	PACE ADMIN	MY ACCOUNT	TRAINING	SUBMIT F	ILING(S)				
Firm Users	Firm Info	Payments Accounts	Firm Fee	Firm Co	ntacts	Services ~	Attorneys	Reports ~	Case Templates
Serv	ice Con	tacts		1					
Contac									◆ Add Contact
	umn header and o	frop it here to group by	y that column	~	Full Nan	10			~
	an radiess				T un reun				•
o ma	lik.jenifer@mailina	ator: com			Jenifer N	lalik			
C	Cases eService	Notifications							
	Drag a column h	eader and drop it here	to group by tha	t column					
	Case Title/Style	~ Cause	/Docket	~ Ju	isdiction			/	
		•		•			6	Ð	
		201610	025	Ca	ss County	- District Cler	k	Detach	
live chat	Ì	D-16-2	016-55-2	Be	a County -	District Clerk		Detach	

Figure 6-3, Selectively Disassociate Cases from Service Contacts

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



Page 32

WO	RKSPACE	ADMIN	MY ACCOUNT	TRAINING	SUBMIT FILING(S)								
Firm l	Jsers Fi	rm Info	Payments Account	s Firm Fee	Firm Contacts Se	ervices ~	Attorneys	Reports ~	Case Templates				
No	on-Fir	m Se	ervice Co	ntacts				-	-	=			3:13
Co	ntacts List	+						O Ad	d Non-Firm Contact			Contact [Detaile
			rop it here to group	by that column					a non r mir contact		ny changes to t es button.		below and click the Save
	Email Add	ress	~	Full Name		~	Firm Name		~				
			$\overline{\mathbf{v}}$			$\overline{\mathbf{v}}$			$\overline{\mathbf{v}}$	First N	Name	N	Middle Name
•	cm@cmass	s. com		Codyy Mody			CM Associates		A	Cody	y		
	Cases									Last N	lame	F	Firm Name
0	Jk@mailina	ator.com		dh saf			dssf			Mody	/		CM Associates
0	tgh@ghj.co			fgf tf			retyuhj			Email	Address		
0	harishsh@	mailinator.c	om	harish sharma			harishsh			cm@	cmass.com		
0	joanamaria	@mailinato	r. com	Joana Maria			joana maria						
0	jonasthhon	nas@joy.co	m	jonas thomas			JT			Save	Changes		Delete Contact
live	chat Dmaili	nator.com		Karem Jones			HYG						_

Figure 6-4, Add and Delete Service Contacts

A. Managing Non-Firm Service Contacts

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

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

As a firm administrator, you can add, edit, and delete Non-Firm Service Contacts associated with your firm account (Figure 6-4).

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



Chapter 7

VII. Managing eFiling and eService Notification eMails

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

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

A. Direct Emails to Other Staff Members

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

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

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

WORKSPACE ADMIN	MY ACCOUNT	TRAINING	SUBMIT FILING(S)				
irm Users Firm Info	Payments Accour	nts Firm Fee	Firm Contacts Services ~ Atto	neys Reports ~ Case Tem	plates		
Firm Contac	ts				-	-	2:18
Contacts List					A O Add Contact		tact Details
Drag a column header and dro	op it here to group	by that column				Make any changes to the information	n below and click the Save Changes button.
Full Name	~	Phone Number		Firm Contact Type	~		
	Ŧ		G		* 🐨	Full Name	Phone Number
ABC		(555) 555-5555		Administration		John	(786) 576-8768
John		(786) 576-8768		л D		Firm Contact Type	Email Address
				2		IT	➡ johnce@mailinator.com
						Check any Notifications you want to Receive Notification of Filing St Receive Notification of Accepte Receive Notification of Rejecte Receive Notification of Service	bmissions Emails d Submissions Emails d Submissions Emails

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

1. Add a New Firm Contact

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

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

filetime

Page 34
- Leave the default of **New Contact** (Figure 7-2, A) if you are adding a new person to the list.
- Enter the name and email address of the contact.
- Select the closest match for Firm Contact Type.
- Check any of the Notifications eMails you want the contact to receive (Figure 7-2, C).
- Click the Add Firm Contact button when done.

Add Firm Contact		×
New Contact A Admin Contact Full Name	Phone Number	
Gabby	(555) 555-5555	
Firm Contact Type	Email Address	
Administration	gabbyv@mailinator.com	
Check any Notifications you want to receive. Notification of Filing Submissions Emails Notification of Accepted Submissions Emails Notification of Rejected Submissions Emails Notification of Service Status Emails		
	Add Firm Contact Close	

Fig. 7-2 Adding firm Contact

2. Edit an Existing Firm Contact

Any existing Firm Contacts will display.

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

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

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

Click the Save Changes button.

B. Direct eService Emails to Additional Firm Staff Member

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

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

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



			^												
			Α												
۷	VORK	SPACE	ADMIN	MY ACCOUNT	TRAINING	SUBMIT F	ILING(S)								
Fin	m Use	rs Fin	n Info	Payments Accounts	Firm Fee	Firm Co	ntacts	Services ~	Attorneys	Reports ~	Case Templat	es			
S	erv	vice	Cont	acts		1		В		-				100	3:13
C	Conta	acts List									Add Cor	ntact	Maka any shangan ta t	Contact Details	alialy the Serve
Dr	rag a c	column hea	der and d	rop it here to group by	y that column								Changes button.	ne momation below and	C
	E	Email Addr	ess			~	Full Nar	me				~			•
						$\overline{\mathbf{v}}$						•	First Name	Middle Nam	ie
<) g	gm@mailin	ator.com				Galileo	Martinez				*	Galileo		
<	o ja	amiexyz@r	mailinator.c	com			James F	Rob					Last Name	Email Addre	ess
0	o j∈	eniferjen@	mailinator.	com			Jenifer .	Jenifer					Martinez	gm@mailir	nator.com
<	o n	nalik.jenife	r@mailina	tor.com			Jenifer I	Malik					Administrative Copy		
0	o jo	ohnsmith@)mailinator	com			John SN	<i>l</i> ith							
<	o jo	oseph.mar	tin@mailin	ator.com			joseph r	martinez							
0	o k	aren@mai	lination.co	m			Karen V	logh					Save Changes		Delete Contact
_	n h	bihh@jhgl	od.com				kjhj bj						View the FileTime eSer	vice Guide	

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

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

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

Click Save Changes.

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

C. Add Additional eService Notification Email Recipients

FileTime enables you to add an unlimited number of additional eService notification email recipients for any eServices you are sent. This feature is unique to FileTime.

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

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

To add multiple eService notification recipients:

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

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

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

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

Click the Add eService Notification button to add a new recipient.



Let FileTime guide you in adding the new recipient.

WORKSPACE ADMIN MY ACCOUNT	TRAINING SUBMIT FILING(S)	
Personal Info B Notification Preferences ~ Char	nge Password	
eService Notification Copies C Administrative Copies Manage Notification Emails Add names and email addresses below of additional	firm staff to whom you want copies sent of any eSer	vice Notification emails delivered to your email
Add New Recipient Drag a column header and drop it here to group by	that column	
Name	Email Address	
•	•	
Jenifer Malik	malik.jenifer@mailinator.com	⊘ Edit X Delete
James Robb	jamiexyz@mailinator.com	⊘ Edit × Delete
James Robb Shawn Malik	jamiexyz@mailinator.com shawn@mailinator.com	 ⊘ Edit × Delete ⊘ Edit × Delete

Figure 7-4, eService Notification Options

D. Customize the eService Notifications Copies List

In section C above we showed you how to create a default list of recipients to receive copies of eService notifications sent to a firm service contact.

However, FileTime also provides a for the firm to create a custom list of recipients for cases. When you create a custom list FileTime ignores the default list of recipients and sends the eService Notification emails only to the names on the case eService Notifications list.



My Ca	ses			-								
Case	e Lis	t										
Drag a	colu	mn header and d	rop it here to	group by that	column							
		Client ID	~	Case Number		~	Jurisdiction	~				
			\bigcirc			•		$\overline{\mathbf{v}}$				
•	*	Mary		123456			Castro County - Dis Clerk	strict	Refresh	File	Archive	
	С	ase Information	Submissio	ns Service (Contacts	- 6	ervice Notifications	•		0		C
					bonnacto	eSt	ervice notifications	Service	Contact Histo	ry ese	ervice Inbox	L
		Attach Case eS	Service Notifi		Sonacio	eoe	B	Service	Contact Histo	ry eSe	ervice Indox	L
		Attach Case eS Drag a column h		cation			В	Service	Contact Histo	ry ese	ervice Indox	L
				cation		t colu	B	Service	Contact Histo	ry ese	ervice Indox	
		Drag a column h		cation op it here to gro	oup by that	t colu	B		Contact Histo	ry eSe	ervice Inbox	L
С		Drag a column h		cation op it here to gr	oup by that Email Ad	t colu	B	~		× Delete		
С		Drag a column h Name		cation op it here to gr	oup by that Email Ad malik.jeni	t colu Idres Ifer@	B s	~	⊘ Edit		3	

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

Form the **Workspace** and while on the Cases page, find the case for which you want to create a custom eService notification emails distribution list.

Click the + sign in the far left column so that it becomes a - sign (Figure 7-5, A).

The case tabs open below the case.

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

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

Click the Attach Case eService Notification button to add recipients.

Click the Edit and Delete buttons for a recipient on the list as needed.

Again, when names are added to this list, only these individuals will receive notification of service emails for this case.

E. Select to Not Receive Specific Notification Emails

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

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

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

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

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

There are two sections of this page.

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



1. eFiling Manager Emails

- Filing Submitted You receive this after each filing is received by eFiling Manager from you.
- **<u>Filing Accepted</u>** You receive this for every filings accepted by the clerk.
- Filing Returned for Correction You receive this when the clerk returns the filing for correction.
- <u>Service Undeliverable</u> This means that the eService cannot be delivered to the intended recipient.
- <u>Filing Submission Failed</u> You receive this when eFiling Manager fails the filing before it gets to the clerk. The reason is always a problem with one of more of the documents.

2. FileTime Notification Emails

- Filing Submitted You receive this for each submission.
- <u>Filing Accepted</u> This comes to you after a filing is accepted and it provides billing information.
- Filing Failed You receive this when eFiling Manager fails a submission.
- Filing Returned for Correction You receive this email, which contains information about how to re-efile and preserve the original submission date when the clerk returns a filing for correction.
- <u>Service Status</u> This email updates you on the status of all the eService recipients after you eServe them.

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



Page 39

rsonal Info Notification Preferences ~ Change Password	
Isonal Into Information Preferences + Change Password	
Administrative Copies A	
e this feature to send, to the email addresses you add below, copies of the no	tification emails for you.
Add New Recipient B	
rag a column header and drop it here to group by that column	
Email Id	
Email Id	
\odot	⊘ Edit × Delete ▲
Email Id Imail Id Imail I definition I	⊘ Edit × Delete ⊘ Edit × Delete
€ malik, jenifer@mailinator.com	
The second secon	⊘ Edit × Delete

Figure 7-6, Adding Admin Copies

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

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

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

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

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

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

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

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



Chapter 8

VIII. Generating Reports

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

We provide your firm three major categories of report types:

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

A. Accessing the Reports Feature

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

Click the Reports button on the sub-navigation bar.

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



Figure 8-1, Accessing the Reports Section



Page 41



B. eFiling Reports

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

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

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



Figure 8-2, FileTime Report Options



1. Quick Overview Report

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

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

Quick C	verview Rep	ort Genera	tor	Halpha	
Date Range:	Overview Report Ger	herator			
Date From	eters for this report: 10/08/2016	1	Date To	12/29/2016	m
Filer	All	•	Attorney Of Record	Jenifer Malik	•
Client ID	All	•	Case Number	All	•
Submission Type	All	•	Status	Submitted	•
Back Gen	erate Report				

Figure 8-3, The Quick Overview Report Generator

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

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



Page 43

Quick Overvie	w Report					
						Export to PDF Export to Exc
Report Parameters	5:					
Date Range:	10/08/201	6 - 12/29/2016	Filer:	All	Attorney:	Jenifer Malik
Client ID:	All		Cause Number:	All	Submission Type:	All
Status:	Submitted	I				
Client ID: JM786	9				Case Style:	
Submission ID 15	9909 submitted by Jenifer Malik b	ehalf of Jenifer Malik				
Date	Status	Filing	Туре	Description	Total	\$262.62
11-23-16	submitted	Application	Both	Application Petition Pe	etition	
Client ID:					Case Style:	
Submission ID 15	8442 submitted by Jenifer Malik b	ehalf of Jenifer Malik				
Date	Status	Filing	Туре	Description	Total	\$3.33
10-25-16	submitted	Motion (No	Fee) Both	Motion		
Client ID:					Case Style:	
Submission ID 15	8327 submitted by Jenifer Malik b	ehalf of Jenifer Malik				
Date	Status	Filing	Туре	Description	Total	\$355.22
10-24-16	submitted	Petition	Both	Petition		

Figure 8-4, Sample Quick Overview Report



Page 44

2. Design Your Report

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

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

Select Table Columns	Select Par	ameters For T	his Report			
Submission ID	Submitted D	ate Range:				
Submission Date	Date From			Date To		
Acceptance Date	Accepted Da	te Range:				
Payment Account	Date From	te runge.	(100)	Date To		(m)
🗆 Filer				Duite fo		
Attorney C	Payment Account	All	-	Case Number	All	*
Filing Type	Filer			Jurisdiction		
Client		All	*		All	•
✓ Client ID	Client ID	All	-	Case Type	All	*
Cause Number	Filing Type	All	-	Case	All	_
Jurisdiction			•	Category		•
Case Type	Client	All	-	Attorney Of Record	All	-
Case Category	Case Parties			Case Parties		
□ Plaintiff	(Plaintiff)	All	•	(Defendant)	All	•
Defendant	Submission	All	•			
Submission Status	Status					

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

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

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

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



Page 45

Your Custom Report

Date Generated:	2/6/2017										Export To PDF	:
Report Parameters:												
For:			AII / AII									
Client ID:			All			Payn	ient Account:			All		
Status:			All									
PaymentAccount	Attorney	MatterNumber	SubmissionStatus	TotalFees	CourtFees	JurisdictionServiceFee	FileTimeFee	Salestax	EFileTexas ServiceFee			
ABC	Jenifer Malik	jenifer	filing has been accepted by the court	\$371.68	\$492.00	\$2.00	\$2.99	\$0.25	\$10.44			
ABC	Jenifer Malik			\$268.79	\$258.00	\$0.00	\$2.99	\$0.25	\$7.55			
ABC	Jenifer Malik	Mary	Filing was cancelled	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
ABC	Jenifer Malik		filing has been reviewed	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
ABC	Jenifer Malik	jenifer	filing has been cancelled	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
ABC	Jenifer Malik		filing has been accepted by the court	\$358.30	\$345.00	\$0.00	\$2.99	\$0.25	\$10.06			
ABC	Jenifer Malik		filing has been accepted by the court	\$466.34	\$1,044.00	\$0.00	\$2.99	\$0.25	\$13.10			
ABC	Jenifer Malik		filing has been rejected	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
	Jenifer Malik		filing has been submitted	\$262.62	\$252.00	\$0.00	\$2.99	\$0.25	\$7.38			
ABC	Jenifer Malik	Mary	filing has been accepted by the court	\$11.56	\$8.00	\$0.00	\$2.99	\$0.25	\$0.32			
	Jenifer Malik		filing has been submitted	\$285.25	\$272.00	\$2.00	\$2.99	\$0.25	\$8.01			
ABC	Jenifer Malik			\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
ABC	Jenifer Malik	MALIK	filing has been accepted by the court	\$295.54	\$282.00	\$2.00	\$2.99	\$0.25	\$8.30			
ABC	Jenifer Malik		filing has been accepted by the court	\$295.54	\$282.00	\$2.00	\$2.99	\$0.25	\$8.30			
live chat	Jenifer Malik		filing has been served	\$3.33	\$0.00	\$0.00	\$2.99	\$0.25	\$0.09			

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



Page 46

3. Credit Card Reconciliation Report

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

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

WORKSPACE	ADMIN	MY ACCOUNT	TRAINING	SUBMI	t filing(s)				
Firm Users Fir	m Info	Payments Accounts	Firm Fee	Firm	Contacts	Services ~	Attorneys	Reports ~	Case Templates
Credit C	ard]	Report Ge	enerato	r				-	
		eport Generator							
Accepted Date Ra		ier and report.							
Date From	10/03/20	16			Date To	11/12	2/2016		
Payment Account	All			*					
Back Gen	erate Repo	rt							



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

The resulting report will resemble Figure 8-8.

Credit C										
	ard Reconciliation Rep	ort								
)ate Rang	ge: 10/03/2016 - 11/12/2016	Payment Acco	unt: All					Ex	port to PDF	Export to Exe
ID	Submission Date	Acceptance Date	Cause Number	MatterNu	umber Attorney	FilerName	Payment Account	Transaction #	Fees	
156973	10/18/16 11:43 AM CDST	10/19/16 09:43 AM CDST	564326		Jenifer Malik	Jenifer Malik	ABC	166091	Total	\$295.54
Filings:	Filing	Туре			Description				Jurisdiction	\$284.00
		Both							eFiling Manager	\$11.54
156954	10/18/16 10:12 AM CDST	10/18/16 03:12 PM CDST	20161025		Jenifer Malik	Jenifer Malik	ABC	165840	Total	\$3.33
ilings:	Filing	Туре			Description				Jurisdiction	\$0.00
		EService							eFiling Man	ager \$3.33
156911	10/17/16 02:14 PM CDST	10/17/16 02:21 PM CDST	2016CI31245	MALIK	Jenifer Malik	Jenifer Malik	ABC	165761	Total	\$295.54
Filings:	Filing	Туре			Description				Jurisdiction	\$284.00
		Both							eFiling Manager	\$11.54
156004	10/17/16 01:56 PM CDST	10/17/16 05:31 PM CDST	123456	Mary	Jenifer Malik	Jenifer Malik	ABC	165812	Total	\$11.56

Figure 8-8, Credit Card Reconciliation Report



Page 47

4. Accepted Submissions Report

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

Select the par	ameters for this report:				
Date Range:					
Date From	10/01/2016		Date To	11/10/2016	
Payment Account	ABC	-	Case Number	All	-
Filer	All	•	Jurisdiction	All	-
Client ID	All	-	Case Type	All	-
Filing Type	eFile	-	Case Category	All	-
Client	All	-	Attorney Of Record	All	-

Figure 8-9, Accepted Submissions Report Generator

You can save this report in PDF format.

Figure 8-10 provides a sample report.



Page 49

ate Range: 1	10/01/2016 - 11/10/2016	Pa	yment Account	ABC		Attorney: All		Ехро	ort to PDF	Export to Exce
ID	Submit Date	Accept Da	te	Cause Number		MatterNumber	Client	Fees		
156973	10-18-16	10-19-16		564326			bfg ghj	Total	\$295.5	4
	Filing		Туре		Description	ו		Court Costs		\$284.00
			Both					Other Fees		\$11.54
156911	10-17-16	10-17-16		2016CI31245		MALIK	malik malik	Total	\$295.5	4
	Filing		Туре		Description	1		Court Costs		\$284.00
			Both					Other Fees		\$11.54
156904	10-17-16	10-17-16		123456		Mary	Roger Ranch	Total	\$11.56	
	Filing		Туре		Description	ı		Court Costs		\$8.00
			Both					Other Fees		\$3.56
156715	10-11-16	10-11-16		42387-2016				Total	\$466.3	4
	Filing	Туре	C	Description				Court Costs		\$450.00
	Petition	Both	P	Petition for employment is	ssue			Other Fees		\$16.34
156713	10-11-16	10-11-16		D-16-2016-55-2			Rosy Van	Total	\$358.3	0
	Filing		Тур	e	Desc	ription		Court Costs		\$345.00
	Petition		Bot	h	Petiti	on		Other Fees		\$13.30
	Petition		Bot	h	Petiti	on				

Figure 8-10, Sample Accepted Submissions Report



5. Accepted Filing Billing Report

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

Select the	parameters for this rep	ort:			
Date Range:					
Date From	09/10/2016		Date To	11/16/2016	
Payment Account	All	•	Case Number	All	*
Filer	All	•	Jurisdiction	All	-
Client ID	All	•	Case Type	All	•
Filing Type	All	•	Case Category	All	•
Client	All	-	Attorney Of Record	All	-

Figure 8-11, Accepted Filings Billing Report

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

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



Page 51

Submission A 11/16/2016	cceptance Date Range: 09/10/	2016 -	Payment Account: A	II	Att	orney: All			Export to PDF	Export to Exce
ID	Submission Date		Acceptance Date		Attorney	Cause Numb	er	MatterNumber	Fees	
156973	10-18-16		10-19- 1 6		Jenifer Malik	564326			Total	\$295.54
	Filing	Тур	e	Description	n		Status		Court	\$284.00
		Bot	h				accepted		Other	\$11.54
156954	10-18-16		10-18-16		Jenifer Malik	20161025			Total	\$3.33
	Filing	Туре			Description		Status		Court	\$0.00
	EService				served					\$3.33
156911	10-17-16		10-17- <mark>1</mark> 6		Jenifer Malik	2016CI31245		MALIK	Total	\$295.54
	Filing	Тур	e	Description	n		Status		Court	\$284.00
		Bot	h		accepted				Other	\$11.54
156904	10-17-16		10-17- <mark>1</mark> 6		Jenifer Malik	123456		Mary	Total	\$11.56
	Filing	Тур	Туре De		Description		Status		Court	\$8.00
		Bot	h				accepted		Other	\$3.56
live chat	10-11-16		10-11-16		Jenifer Malik	42387-2016			Total	\$466.34

Figure 8-12, Sample Accepted Filings Billing Report



Page 52

6. Individual Filing Report

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

Select the	parameters for this rep	ort:			
Date Range:					
Date From	11/01/2016		Date To	01/23/2017	<u> </u>
Payment Account	All	•	Case Number	All	-
Filer	All	-	Jurisdiction	All	-
Client ID	All	-	Case Type	All	-
Filing Type	All	•	Case Category	All	-
Client	All	•	Attorney Of Record	All	•

Figure 8-13, Individual Filings Report Generator

You can save this report in PDF format.

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

Date : Type : Client ID: Client	: 01/05/17 : Both : Mary
Cause Number:	: Marry Roger Ranch : 123456 : Castro County - District Clerk
Filing Code: Attorney: Filer:	: Castro County - District Clerk : 151327 : Jenifer Malik : Jenifer Malik
Billing Overviev	v
Court Fees Other Fees Total Fees	
Billing Details	
Pending Jury Demand Case Initiation Fee Court Service Fee Filing Manager Convenience Fee FileTime Fee Sales Tax	\$60.00 \$0.00 \$0.00 \$1.83 \$1.83 \$2.99 \$0.25
Total	\$65.07
Payment Accou	int
ABC	



Page 53

7. Export Report Generator

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

Accepted Filin		eters for this ex te Range:	port.				
Date From		Required			Date To	Required	
Payment Accou	unt ,	All		.			
SEQ I	nclude	Description	Input			Rules	
1	×	Date	 mm/dd/yy mm/dd/yyyy yyyymmdd 				
2	×	Client				Max Characters::	
3	×	Client ID				Max Characters::	
4	۷	Exp Code				Max Characters::	
5	8	Fee				Allow \$ Sign:	
6		Narrative				Max Characters::	

Figure 8-15, Export Report Generator

The data provided by default in this report is:

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



Page 54

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

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

Export Report

Report Export - Results

Created:	: 2/6/2017
Firm:	: ABC Associates
Report Criteria:	
Time Period:	: 10/1/2016 12:00:00 AM - 2/6/2017 11:59:59 PM
Payment Account:	: All

ID	Date	Client	Client ID	Exp Code	Fee (\$)	Narrative
156973	10-19-16	bfg ghj			295.54	
156954	10-18-16	John Cena			3.33	
156911	10-17-16	malik malik	MALIK		295.54	
156904	10-17-16	Roger Ranch	Mary		11.56	
156715	10-11-16				466.34	
156713	10-11-16	Rosy Van			358.30	
156696	10-11-16	mary j	jenifer		371.68	
Total:					1802.29	

Figure 8-16, Sample General Report



C. eServices Reports

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

WORKSPAC	E ADMIN	MY ACCOUNT	TRAINING	SUBMIT FILING(S)				
Firm Users	Firm Info	Payments Accounts	Firm Fee	Firm Contacts	Services ~	Attorneys	Reports ~	Case Templates
eServi	ice Rep	ports					-	
S.	elect the e	Service report	you want	to generate				
» 🔤	eService Int	box Report						
× 💽	eService Ou	tbox Report						

Figure 8-17, eServices Reports



Page 56

1. Inbox Reports

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

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

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

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

WORKSPACI	ADMIN	MY ACCOUNT	TRAINING	SUBMIT FILING(S)			
Firm Users	Firm Info	Payments Accounts	Firm Fee	Firm Contacts	Services ~ Attorneys	Reports ~	Case Templates
Report	Gene	rator					
eSe	rvice Inbo	x Report Gener	ator				
		x Report Gener	ator				
	arameters	for this report:	ator				
Select the p Select the par Date Range:	arameters	for this report:	2553.683 	Date To	01/07/2017		m
Select the par	arameters	for this report:	2553.683 				
Select the par Select the par Date Range: Date From	ameters for th	for this report:		Case Numbe			

Figure 8-18, eService Inbox Report Generator

Enter your filtering criteria and click the Generate Report button.

Your report will resemble Figure 8-19.



Page 57

						Export to PDF	Export to Excel
Date Range:	10/08/20	016 - 01/07/2017	Client ID:	All	Case Number:	All	Filer: All
Attorney:	All		Client:	All			
Served Date	Case Number	Jurisdiction	Attorney	Firm	Document		
10/10/16		Bee County - County Clerk	sun snu	Sirisha's Firm	eTimeTrack Lite Help manual.pdf		
10/11/16	DC-09-124234	Bexar County - District Clerk	sun snu	Sirisha's Firm	20161002115647 Exhibit A.pdf		
10/11/16		Cass County - District Clerk	Jenifer M	ABC	1 MB Filing.pdf 5 Pages Searchable.pdf		
10/11/16		Bee County - District Clerk	Jenifer M	ABC	rosy criminial.pdf		
10/11/16		Bee County - District Clerk	Jenifer M	ABC	5 Pages Searchable.pdf		
10/11/16		Bexar County - District Clerk	11	Sirisha's Firm	eTimeTrack Lite Help manual.pdf		
10/13/16		Bexar County - District Clerk	sun snu	Sirisha's Firm	abiz7 EMPLOYEE DETAILS.pdf		
10/14/16	DC-09-124234	Bexar County - District Clerk	sun snu	Sirisha's Firm	1 MB Filing.pdf		
10/17/16		Bexar County - District	Jenifer M	ABC	2.5 MB Filing.pdf		

Figure 8-19, eService Inbox Report



Page 58

2. Outbox Reports

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

	Generator			and the second	
=					
eServ	vice Outbox Report				
Select the pa Date Range:	rameters for this report:				
Date From	10/08/2016		Date To	01/23/2017	
Client ID	All	•	Case Number	All	•
Filer	All	.	Attorney Of Record	All	•
Client	All	•			
Back Ge	enerate Report				

Figure 8-21, eService Outbox Report Generator

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

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

Generate this report in the same manner that you generate the eService Inbox Report. View a sample report in Figure 8-22.



Page 59

Date Rang	10.		10/08/2016 - 01/2	23/2017 Client ID:	All	Case Number:	All			
Filer:	All			Attorney:	All	Client:	All			
		a		,						
Date	Client ID	Case Number	Recipient	Document			Statu			
10/11/16	jenifer	2016CI10256	tom s	petition.pdf 1 MB Filing.pdf Stamped1 MB	Filing.pdf Stampedpetition.pdf Stam	pedpetition.pdf Stamped1 MB Filing.pdf	Error			
10/11/16			Jenifer Malik	criminal 1.pdf criminal 2.pdf			Error			
10/11/16	Mary		Karem Jones	5 Pages Searchable.pdf			Sent			
10/11/16		20161025	Jenifer Malik	1 MB Filing.pdf 5 Pages Searchable.pdf Star	Filing.pdf 5 Pages Searchable.pdf Stamped_5 Pages Searchable.pdf Stamped_1 MB Filing.pdf					
10/11/16	jenifer	2016CI10256	James Kornell	2.5 MB Filing.pdf	MB Filing.pdf					
10/11/16		D-16-2016-55-2	Jenifer Malik	rosy criminial.pdf Stamped_rosy criminial.pdf	·		Sent			
10/11/16		42387-2016	Karen Vogh	Fillable Request Process Form.pdf 2.5 MB Fil	ing.pdf StampedFillable Request Proc	ess Form.pdf Stamped2.5 MB Filing.pdf	Error			
10/13/16			Jenifer malik	(1)One.pdf			Error			
10/17/16	Mary	123456	Karem Jones	5 Pages Searchable.pdf Stamped_5 Pages S	Searchable.pdf		Sent			
10/13/16			Jenifer Malik	(3)Three.pdf			Error			
10/17/16		123456	Karem Jones	4 Pages Searchable.pdf			Sent			
10/17/16	MALIK	2016CI31245	Nat brown	2.5 MB Filing.pdf Stamped2.5 MB Filing.pd	f		Sent			
10/18/16		564326	Jenifer Malik	Amended Notice of Hearing.pdf StampedAr	mended Notice of Hearing.pdf Stamped_	Amended Notice of Hearing.pdf	Sent			
10/18/16		20161025	Jenifer Malik	(1)One.pdf			receiv			
10/21/16		D-16-2016-55-2	James Rob	1 MB Filing.pdf 5 MB Filing.pdf			Sent			
10/21/16		D-16-2016-55-2	James Kornell	(3)Three.pdf			Sent			

Figure 8-22, eService Outbox Report



D. Alerts Reports

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

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

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

	WORKSPA	CE ADMIN	MY ACCOUNT	TRAINING	SUBMIT FILING(S)				
	Firm Users	Firm Info	Payments Accounts	Firm Fee	Firm Contacts	Services ~	Attorneys	Reports ~	Case Templates
6	Alert	Report	s					-	
	s	elect the a	lert report you	want to g	enerate				
	»	Returned for	Correction Filings						
	× 💽	Failed Filing	S						
	× 💽	eService Fa	iled						
	» 🌉	Fax Service	Failed						

Figure 8-23, Alerts Reports Options

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



Page 61

1. Returned for Correction Filings

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

Returned For Correction Report Generator									
Retu	Irned For Correction Re	eport Generator							
Select the p Date Range:	arameters for this report	t							
Date From	10/07/2016		Date To	12/30/2016					
Filer	All	•	Attorney Of Record	All	•				
Client ID	All	*	Case Number	All	•				
Status	All	•							
Back	Generate Report								

Figure 8-24, Returned for Correction Report Generator

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

Fillings already resubmitted display a status of Resubmitted.

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

Returned For Correction Report

Returned For Correction	Report					
						Export to PDF Export to Exc
Report Parameters:						
Date Range:	10/07/2016 - 12/3	0/2016	Date Range:	10/07/2016 - 12/30/2016	Filer:	All
Client ID:	All		Client ID:	All	Attorney:	All
Case Number:	All		Case Number:	All	Status:	All
Date	Client ID	Case Number	Filer	Document		Status
12/07/2016 14:42PM	jenifer	2016CI10256	Jenifer Malik	Open Obvious 12-07-16.pdf		Resubmitted
12/07/2016 14:42PM	jenifer	2016CI10256	Jenifer Malik	First Amended Petition.pdf		Resubmitted
10/12/2016 16:34PM			Jenifer Malik	5 MB Filing.pdf 2.5 MB Filing.pdf		Resubmitted

Figure 8-25, Returned for Correction Report



Page 62

2. Failed Filings

This report provides you a list of all submissions failed by the eFiling Manager system based on the

parameters you provide. You can even filter to see which ones have not been resubmitted. Figure 8-26 shows the report generator page.

Failed Filings Report Generator									
	d Filings Depart Conser								
	ed Filings Report Genera								
Date Range:	parameters for this report								
Date From	10/01/2016		Date To	01/16/2017					
Filer	All	•	Attorney Of Record	All	•				
Client ID	All	•	Case Number	All Carter Bush Jenifer Malik					
Back	Generate Report			Connor Hunny					
Duon									

Figure 8-26, Failed Filings Report Generator

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

Failed Filin	1gs Report				-		
Failed Filings Repo Report Parameters:	ort					Export to PDF	Export to Exce
Date Range:	10/01/2016 - 01/16/2017	Case Number:	All				
Clind ID:	All	Filer:	All		Attorney:		All
Date	Client ID	Case Number		Filer	Document	t	

Figure 8-27, Failed Filings Report



Page 63

3. eService Failed

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

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

Failed eService Report Generator Select the parameters for this report: Date Range: Date From Image: Client ID All Filer All Image: Contact	
Date Range: Date From Client ID All Client ID	
Date From Date To Case Number All	
Client ID All Case Number All	
Filer All Contact All	•
	•
Back Generate Report	

Figure 8-28, Failed eService Report Generator

Figure 8-29 shows a typical failed eService report.

Failed eService Re Report Parameters:	eport					Export to PDF	Export to Exc
Date Range:		10/09/2016	- 02/09/2017	Client ID:	All	Case Number:	All
Filer:		All		Contact:	All		
Date	Client ID	Case Number	Filer	Document			
02/02/2017 13:19PM	Mary	123456	Jenifer Malik	Jenifer Tracker.pdf			
11/23/2016 13:51PM	JM7869		Jenifer Malik	5 Pages Searchable.pdf			
11/15/2016 12:06PM	jenifer	2016CI10256	Jenifer Malik	Amended Notice Hearing.pdf			
10/24/2016 12:14PM			Jenifer Malik	1 MB Filing.pdf			
10/17/2016 13:56PM	Mary	123456	Jenifer Malik	5 Pages Searchable.pdf Stamped	Pages Searchable.pdf		
10/13/2016 18:17PM			Jenifer Malik	(3)Three.pdf			
10/13/2016 11:17AM			Jenifer Malik	(1)One.pdf			
10/11/2016 15:21PM		42387-2016	Jenifer Malik	Fillable Request Process Form.pdf 2	.5 MB Filing.pdf StampedFillable Re	equest Process Form.pdf Stamped2.5 MB Filing.pdf	
10/11/2016 11:59AM			Jenifer Malik	criminal 1.pdf criminal 2.pdf			
10/11/2016 11:33AM	jenifer	2016CI10256	Jenifer Malik	petition.pdf 1 MB Filing.pdf Stampe	d 1 MB Filing.pdf Stamped petition	.pdf Stamped petition.pdf Stamped 1 MB Filing.pd	ff

Figure 8-29, Failed eService Report



Page 64

4. Fax Service Failed

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

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

Report Generator										
	Service Failed Generate									
Date From		m	Date To							
Viewed By	All	•	Deleted By	All	*					
Client ID	All	•	Case Number	All	*					
Filer	All	•	Client	All						
Attorney Of Record	All	-								
Back	Generate Report									

Figure 8-30, Failed Fax Service Report Generator

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

Fax Service Faile	d Report								
Report Parameter	s:							Export to PD	F Export to Exce
Date Range:	11/	01/2016 - 02/09/	2017 Viev	wed By:	All	Client ID:	All	Case Number:	All
Deleted by:	All		File	r.	All	Client:	All		
				-					
Date	Client ID	Case Number	Filer	Document					Status Code
02/01/2017 19:02PM			Jenifer Malik	5 Pages Search	able.pdf Sideways.pdf U	lpside Down.pdf Zapfdingbats.pd	df Secured.PDF Affidavit	Controverting Motion.pdf	Unspecified failur
02/01/2017 19:02PM			Jenifer Malik	Motion for Disc	tion for Discovery.pdf				
01/05/2017 18:26PM	Mary	123456	Jenifer Malik	Jenifer Tracker.	pdf				Unspecified failur
12/07/2016 14:42PM	jenifer	2016CI10256	Jenifer Malik	Open Obvious	12-07-16.pdf				Unspecified failur
	jenifer	2016CI10256	Jenifer Malik	First Amended	Petition.pdf				Unspecified failur
12/07/2016 14:42PM									Unspecified failur

Figure 8-31, Failed Fax Service Report



Page 65

Chapter 9

IX. Navigating and Customizing Your Views

We designed FileTime data grids to provide you powerful tools to find specific records and customize the columns to better meet your needs.

A. Firm/Personal Filter

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

But, as a firm eFiling administrator you may want to click the Firm options in order to view actions firm-wide rather than just for yourself.

WORKSPAC	e admin	MY ACCOUNT	TRAINING	SUBMIT	FILING(S)			
Dashboard	Submit Filing(s)	Cases	Submissions	Filings	Services ~	Drafts	Templates ~	Alert(s)
List of	Cases							
Search Case	s							
G Submit Ne	w Case Filing							
Castro Count	y - District Clerk		- Require	d			Go	
My Cases			•					
My Cases			_					
Firm Cases Archived Case	es							

Figure 9-1, Firm/Personal Filter



A. Sorting Grid Columns

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



Fig 9-2, Grid Sorting and Display Options

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

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

A. Customizing Grid Columns

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

A. Searching in Grids

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

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



Fig 9-2, Searching the Column

Page 67



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

Case Number	A	
↓ Sort Ascending	Contains	C
↓ F Sort Descending	Starts with	A
III Columns 🕨	Is equal to	
⑦ Filter ▶	Is not equal to	E
	Contains •	
D-16-2016-55-2	Filter Clear	



- Starts with (Figure 9-4, A) Select this choice and you will filter for any records that start with the data you enter in Figure 9-3, C.
- Is not equal to (Figure 9-4, B) Select this option leave all records displayed on the grid except those that are equal to the data you enter into C.
- Is equal to (Figure 9-4, C) Select this option and only records that are exact matches to what you enter into C will be displayed.
- **Contains (**Figure 9-4, D) This option is often the most useful. Use is when you are not sure of the exact data you look up. This option causes FileTime to display and records with any part that matches the data you enter (Figure 9-3, C).

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

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

1. Click the Filer or Clear button

Click the **Filter** button (Figure 9-3, D) to perform the search/filter. You will be returned to the grid with only the record or records matching your search/filter being displayed.

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



Page 68

A. Drill Down

The **Cases** page contains a drill down option that enable you to dig down inside each case and see a great deal of the case information without going to a new page.

А	0		D-16-2016-55-2	Bee County - District Clerk	Refresh File Archive
		Case Information CSul	bmissions Service Co	ntacts eService Notifi	cations Service Contact His >
В	0		42387-2016	Austin County - District Clerk	Refresh File Archive

Figure 9-5, Drill Down for Case Information

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

Click on each tab to view the information available:

- · Case Information Under this tab you will find basic information about the case.
- **Submissions** You will find a list of submissions for the case under this tab. You will then be able to click to open the Details page for each submission.
- **Case Service Contacts** Under this tab you can view all counsel for the case, including your firm's service contacts and other counsel listed as service recipients.
- Case Service Contact History Under this tab you will be able to view the Add and Delete history for all the service contacts to this case.

In the example above, the **Submissions** tab is clicked and FileTime displays the single submission for this case (Figure 9-5, C).

A. Grid Navigator

file**time**>

When you have a large number of cases, submissions, filings, etc., they cannot all be displayed conveniently on one page.

The navigator at the bottom (Figure 9-6) of the grid provides ways to quickly view all the rows on the grid.

H Page 1 Image 1 20	 items per page 	1 - 20 of 20 items
DE C FG B	-	A

Figure 9-6, The Grid Navigator

• Total Records (Figure 9-6, A) - The records display shows which group out of the total number



of records (cases, submissions, filings, etc. - depending on which grid) are available.

- Items per Page (Figure 9-6, B) You have multiple selections concerning how many rows you want FileTime to display.
- **Page Displayed** (Figure 9-6, C) This area shows you which page of the total pages available is displayed. The number of pages available will vary by the number of records available and the number of records you want FileTime to display.
- Go to Beginning (Figure 9-6, D) Click this button and you are returned to the page containing the first record.
- Go Back One Page (Figure 9-6, E) Click this button to go back one page.
- Go Forward One Page (Figure 9-6, F) Click this button to go forward one page.
- **Go to End** (Figure 9-6, G) Click this button to go to the last page.



Chapter 10

X. eFile Notification Emails

A. Registration Emails

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

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

1. Activation Email - Administrator Registered

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

EFILE TEXAS.gov ⁻	New User Activation			
Your firm administrator has registered you for use with the eFiling system. Click the link below to activate your account. Please, contact your firm administrator with any questions.				
Click to Activate Account				
After activating your account, use the following password: 91^DFySv=)				
Please, update your password after you log into your account.				
	For technical assistance, contact your service provider			
	Online: https://www.FileTime.com Phone: (800) 658-1233 Available 24x7 and online with chat			
Please do not reply to this email. It was automatically generated.				

2. Activation Email - User Registered

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



filetime

Page 71
B. eFiling Manager eFiling Notifications

The following notification emails are delivered directly from eFiling Manager to the intended recipient. FileTime is not involved in any in the delivery process.

1. Submitted Filing Notification

You will receive this email immediately after your submission. You will receive an email for each filing included in the submission.

EFILE	Filing Submitted
TEXAS.gov	Envelope Number: 84000

Filing Details		
Date/Time Submitted:	10/21/2014 11:01:45 AM	
Filing Type:	Petition	
Activity Requested:	EFileAndServe	
Filed By:	Kindra Reese	

Fee Details			
This envelope is pending review and fees may change.			
Case Fee Information			\$282.21
Case Fees			\$272.00
Convenience Fees		\$8.21	
Court Service Fees		\$2.00	
Petition		\$10.00	
Optional Services Fee Per		Quantity	1.1
Citation On A Civil Case Served By A Private Process Server \$8.00		1	\$8.00
• Copies \$0.50		4	\$2.00
Total: \$292.21 (The envelope still has pending filings and the fea	es are subj	ect to chan	ge)

Document Details		
Lead File:	Petition - Motor Vehicle Accident.pdf	
Lead File Page Count:	4	



Page 72

2. Accepted Filing Notification

You will receive this email immediately after a filing has been accepted by the clerk office.



Filing Details		
Case Number	2014-34876	
Case Style	John Smith v Ames Towing	
Date/Time Submitted	10/21/2014 11:01:45 AM	
Date/Time Accepted	10/21/2014 11:10:53 AM	
Filing Type:	Petition	
Activity Requested:	EFileAndServe	
Filed By:	Kindra Reese	

Fee Details			
This envelope is pending review and fees may change.			1.40
Case Fee Information			\$282.21
Case Fees			\$272.00
Convenience Fees		\$8.21	
Court Service Fees			\$2.00
Petition			\$10.00
Optional Services Fee Per		Quantity	1
Citation On A Civil Case Served By A Private Process Server \$8.00		1	\$8.00
• Copies \$0.50		4	\$2.00
Grand Total			\$292.21

Document Details	
Lead File: Petition - Motor Vehicle Accident.pdf	
Lead File Page Count: 4	
File Stamped Copy https://filerstage.eFiling Manager.gov/ViewDocuments.aspx?- FID=5d12c449- 817b-4516-8693-208b071cbc0a	

Click the View Document link to download a file marked copy of the document.



Page 73

3. Filing Returned for Correction Notification

You will receive this notification when the clerk has returned the filing for correction. The clerk will provide the reason for the return.

FFILE
LILL
TEXAS gov

Filing Returned Envelope Number: 84006

The filing below which has been previously served to you has been returned for further action from the filer.

Return Reason(s) from Clerk's Office		
Return Reason(s) Incorrect/Incomplete Info: Please resubmit using correct Case Ca egory Incorrect/Incomplete Info: Please resubmit using correct Case Ca		
Return Comment		

Document Details		
Case Number	2013-CI-11516	
Case Style	Amanda Fleming v Acme Trucking	
Date/Time Submitted	10/22/2014 10:03:20 AM	
Activity Requested	No Fee Documents	
Filed By	Charles Smith	
Service Contacts	Kindra Reese	

The clerk has the option to "suspend" you filing for reasons such as:

- **Insufficient Fees** Occurs is you do not select and pay the correct fees required for the filing. This might include not selecting the Case Initiation Fee, not selecting the appropriate number of copies to attach to the citation, etc.
- **Insufficient Funds** This occurs when your credit card is declined by your credit card issuer. Neither FileTime nor eFiling Manager will ever decline a credit card that is always an issue with your issuer.
- Document Addressed to Wrong Clerk This occurs when you select the incorrect jurisdiction.
- **Incorrect/Incomplete Information** This occurs when you do not have not included required information such as the case number, case type, party names, party addresses, attorney-party emails addresses, etc.
- **Incorrect Formatting** There is a problem with one, or more, of the PDF files you submitted.
- **PDF Documents Combined** The jurisdiction requires that each of the lead documents be filed as separate documents, not all combined.
- Illegible/Unreadable The clerk deems the document to be illegible.
- Sensitive Data You need to redact the sensitive data in the document.

In order to preserve the original submission date for you resubmission, use the <u>Returned for</u> <u>Correction method</u>.



4. Failed Filing Notification

You will receive this notification if/when eFiling Manager detects an error with one, or more, of the documents in the filing. The reason for the error will probably not be clear so call our Customer Support team so we can contact the eFiling Manager or clarification of what changes are needed.



Filing Failed Envelope Number: 84010

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

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

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

A Failed filing is always caused by an issue with one, or more, of the documents you submitted.

The most common reasons for this are:

- Non-Allowed Character in the Document Name A document name can be composed only of alpha-numeric characters plus periods. You cannot use characters such as -, @. #, etc.
- Non-Allowed Fonts This occurs most commonly when you OCR pre-printed governmentstyle forms such as BVS forms. The OCR software sometimes inserts non-allowed fonts for symbols such as check boxes.
- Outside Links You cannot eFile documents that contain links to URLs outside the document.

You will have to resubmit a new filing when a filing has been Failed by eFiling Manager.



Page 75

C. eFiling Manager eService Notification eMails

eFiling Manager also sends four different notification emails regarding eService issues.

1. Notification of Service

eFiling Manager sends this email to every eService recipient for the case, unless the filer specifically chooses not to eServe a specific counsel.



Notification of Service Envelope Number: 84010

This is a copy of service for the filing listed. Please click the link below to retrieve the submitted document.

Filing Details		
Case Number:	201432551	
Case Style:	Amanda Fleming v Acme Trucking	
Court:	\$\$\$courtname	
Date/Time Submitted:	10/21/2014 11:01:45 AM	
Activity Requested:	No Fee Documents	
Filed By:	Anita Davalos	
Service Contacts	Other Service Contacts not associated with a party on the case: Sherry Land (sland@myfirm.com)	

	Document Details
Lead File:	\$\$\$leaddocumentfilename
Lead File Page Count:	\$\$\$leaddocumentpagecount
File Stamped Copy:	https://www.eFiling Manager.gov/ViewServiceDocuments. aspx?ADMIN=0&SID=262f09eb-76f9-49f0-8478- 58b01cd4b249&RID=66ceea5e-9712-463a-97dd- bd866257a826



Page 76

2. Copy of Notification of Service

eFiling Manager sends this email to persons designated to receive an Administrative Copy of eServices sent to a case eService recipient.



This is a copy of service for the filing listed. Please click the link below to retrieve the submitted document.

Filir	Filing Details	
Case Number:	201432551	
Case Style:	Amanda Fleming v Acme Trucking	
Court:	\$\$\$courtname	
Date/Time Submitted:	10/21/2014 11:01:45 AM	
Activity Requested:	No Fee Documents	
Filed By:	Anita Davalos	
Service Contacts	Other Service Contacts not associated with a party on the case: Sherry Land (sland@myfirm.com)	

	Document Details
Lead File:	\$\$\$leaddocumentfilename
Lead File Page Count:	\$\$\$leaddocumentpagecount
File Stamped Copy:	https://www.eFiling Manager.gov/ViewServiceDocuments. aspx?ADMIN=0&SID=262f09eb-76f9-49f0-8478- 58b01cd4b249&RID=66ceea5e-9712-463a-97dd- bd866257a826



Page 77

3. Filing Failed - eService Recalled

When a filer has eServed a recipient along with an eFiling, and if the eFiling is Returned for Correction by the clerk, this eService recall email is sent to the recipient.



The filing below which has been previously served to you has been returned for further action from the filer.

Return Reason(s) from the Clerk's Office
Return Reason	Incomplete Signature Block - TRCP 21(f)(2)/TRCP 57
Return Comment	\$\$\$rejectreason

	Filing Details
Case Number	DC-14-12214
Case Style	Helen Saunders, et al vs. Great State Insurance Company, et al
Court	Dallas County - District Clerk - Civil
Date/Time Submitted	5/15/2015 9:38:05 AM
Activity Requested	Motion (No Fee)
Filed By	Charles Smith
Service Contacts	\$\$\$allcontacts



Page 78

4. Filing Failed - eService Returned

When a filer has eServed a recipient along with an eFiling, and if the eFiling is Returned for Correction by the clerk, this eService recall email is sent to the recipient.



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

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

	Document Details
Case Number	DC-14-12214
Case Style	Helen Saunders, et al vs. Great State Insurance Company, et al
Court	Dallas County - District Clerk - Civil
Date/Time Submitted	5/15/2015 9:38:05 AM
Activity Requested	Motion (No Fee)
Filed By	Charles Smith
Service Contacts	\$\$\$allcontacts



Page 79

D. FileTime Registration eMail

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

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

	Fast and Reliable
Dear Jenifer:	
Cody Mosby has registered with your firm an one of your firm eFiling administrators.	d is waiting for approval from
To approve Cody:	
Login to www.filetime.com	
Click the ADMIN button,	
Click Firm Users,	
Find Cody Mosby on the grid, click to highlig User Information area.	ht, then click Approve in the
If you are out of the office you can do the sa device.	me from any Android mobile



E. FileTime eFiling Notification eMails

FileTime sends the following eFiling Notification eMails:

1. Proof of Submission

Proof of Submission

Submission ID: 167394

Submission Date & Time: 02/09/17 02:00 PM CST

Case Information

Case Title:	Client ID: jenifer
Jurisdiction: Castro County - District Clerk	Cause No: 123456
Case Category: Family/Juvenile - Title IV-D (OAG Use Only)	Attorney: Jenifer Malik
Case Type: (Title IV-D OAG Use	Filer: Jenifer Malik
Only)Capias/Writ	Payment Account: ABC
Case Parties	

Party Type	Name	Our Client
Petitioner	Roger Ranch	Yes
Respondent	Richie Rich	No
Respondent	Krish Rich	No

Filings

Fees Breakdown

Court Fees Notice of Appeal Filing Fee \$0.00 Total Fee For \$0.00 This Filing Submission Fees Sales Tax on \$0.00 FileTime Fee Total Submission \$0.00 Fees Total Fees for \$0.00 this Filing Credit Card Information for This Filing Your credit card statement will

statement will show: Pleading Jurisdiction \$0.00 eFiling \$0.00 Manager \$0.00

filetime

2. Accepted Filing

FileTime sends the following email to the filer after the filing has been accepted by the clerk of court. This email contains final eFiling fees data that can be used for billing.





Page 82

3. FileTime Filing Returned for Correction Notification

FileTime sends the following email to the filer when the clerk of court returns the filing for correction. If the filer re-submits the filing using the instructions in the email the original submission date of the documents will be preserved.

TEXAS	
Returned for Correction	
SUB: Your submission has been Returned for Correc	tion
The following Filing was Returned for Corre clerk of court.	ction by the
Submission ID: 167778	
Client ID:	
Cause Number:	
Style:	
Jurisdiction: Dallas County - County Clerk - Probate	
Case Category: Probate	
Case Type: Independent Administration	
Filing Type: eFile & eServe	
Document Name: (1)One.pdf	
Outpringing Times 02/45/47 04/50 DM OOT	
Submission Time: 02/15/17 04:58 PM CST	
Clerk Comments: No rejection comment was provided the court into which you are filing for more information	



Page 83

4. FileTime Filing Failed Notification

FileTime sends the filer the following email notification when a filing was failed by eFiling Manager before the filing was submitted to the clerk of court.

Therefore, the original filing date is not preserved.

eFiling Manager does not provide the reason a filing was Failed by them but it is always due to an **issue or issues with the document(s)**.





Page 84

F. FileTime eService Notification Emails

FileTime sends the following eService-related emails unless you specifically opt-out of receiving them.

1. eService Status

FileTime sends the eService Status email to the filer to provide a quick view of the status of the services.

- A status of **Served** indicates that the recipient has been legally served.
- A status of indicates that the service failed and you need to eServe the recipient using another method.

 filetime	Fast and Reliab	le
Proof of Service		
Submission ID: 167394		
Old Submission ID:		
Submission Date and Time: 02/	09/17 02:00 PM	
Jurisdiction: Castro County - Dis	strict Clerk	
Cause Number: 123456		
Case Title:		
Matter Number: jenifer		
Client ID: Roger Ranch		
eServed Document(S) Det	ails	
Filing	Document	
Notice of Appeal	Petitioner's Brief on the Merits.pdf	
Service Status Status Recipient Pending dh saf	Receiving Firm dssf	



Page 85

2. Copy of eService

If you have designated additional firm staff to receive copies of eService notifications sent to you, they will receive the following notification email from FileTime.





Page 86

G. FileTime Fax Service Notifications

1. Fax Service Successful

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





Page 87

2. Fax Service Failed

FileTime sends the following email to the filer when an eFax cannot be delivered.





Chapter 11

XI. Archiving/Reactivating Cases

FileTime enables you to archive inactive cases and submissions, filings, and eServices. Archiving moves inactive cases, for instance, from the list of active cases but it does not delete those cases from our data base. You can later access an archived case and reactivate them it if necessary.

A. Archive a Case/Submission/Filing

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

)rad	a co	lumn header and	d drop i	it here to group by that	column			
Jug		Client ID 🔺	~ ~	Case Number V	Jurisdiction ~			
•	*	Mary	•	123456	Castro County - District Clerk	Refresh	File	Archive
0				D-16-2016-55-2	Bee County - District Clerk	Refresh	File	Archive
^				42387-2016	Austin County - District Clerk	Refresh	File	Archive

Figure 11-1, Archive a Case

Click the Archive button (Figure 11-1, A) for that case.

The case is now moved from the list of active cases to the Archived Cases list.

Use the same process to archive **submissions**, **filings**, and **eServices** on their respective pages. Be aware that this process archives the case for your entire firm.



A. Access an Archived Case

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

Search Cases			
Submit New Case Filing			
Castro County - District Clerk	•	Required	Go
My Cases	•		
My Cases			
Firm Cases			
Archived Cases			



The drop-down selector opens - click Archived Cases (Figure 11-2, B).





Page 90

ag a	col	umn header and o	drop i	t here to group by	that co	olumn		
		Client ID ▲	~	Case Number	~	Jurisdiction ~		
			$\overline{\mathbf{v}}$		•	\bigcirc		
	*	Mary		123456		Castro County - District Clerk	Refresh File Reactivate	*



From the **Archived Cases** list choose the Case you wish to review and click on the row of the case to highlight it.

Click the **Refresh** button (Figure 11-4, B) to download the most current information about the case from eFiling Manager.

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

A. Reactivate an Archived Case

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

Page 91





Chapter 12

XII. Getting Assistance and Giving Feedback

We provide a number of training options for you.

A. Training

1. MCLE-Accredited eFiling Training

We provide a free one-hour MCLE accredited eFiling training class nearly every week. It is delivered over the Internet so you can participate from your desk or on your tablet computer from the beach if you prefer.

Register here for a training class: www.filetime.com/Training/Register

B. Video Training

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

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

C. Manuals

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

- <u>eService Guide</u> Everything you want and need to know about eService.
- <u>eFiling Guide</u> A detailed look at the FileTime eFiling process.
- <u>Searchable PDF Guide</u> This guide explains what a searchable PDF is and how to create them

D. Contact Us

Click the Contact Us button at the top of the page for our phone number or to send us an email.

Click the **Chat** button at the top of the page to initiate a chat session with us.

E. Knowledge Base

You can find answers to a wide variety of questions asked by customers about eFiling and eService. Go to the **FileTime Knowledge Base** and find the answers to your questions. If your question is not there, post a question and we'll get back to you with the answer. <u>http://feedback.filetime.com/</u> knowledgebase

F. Feedback

We welcome feedback and particularly look forward to suggestions for improving our product or service. After logging into FileTime.com you will find a **Feedback and Support** tab on the extreme left margin of your monitor. Click it to open a window in which you can enter your feedback.



Page 92