eService Guide

This guide provides you detailed instructions on using the FileTime eService features, many of which are exclusive to FileTime.

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

Revised 12/12/2016

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Chapter 1

I. The eService Process

A. How eService Works

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

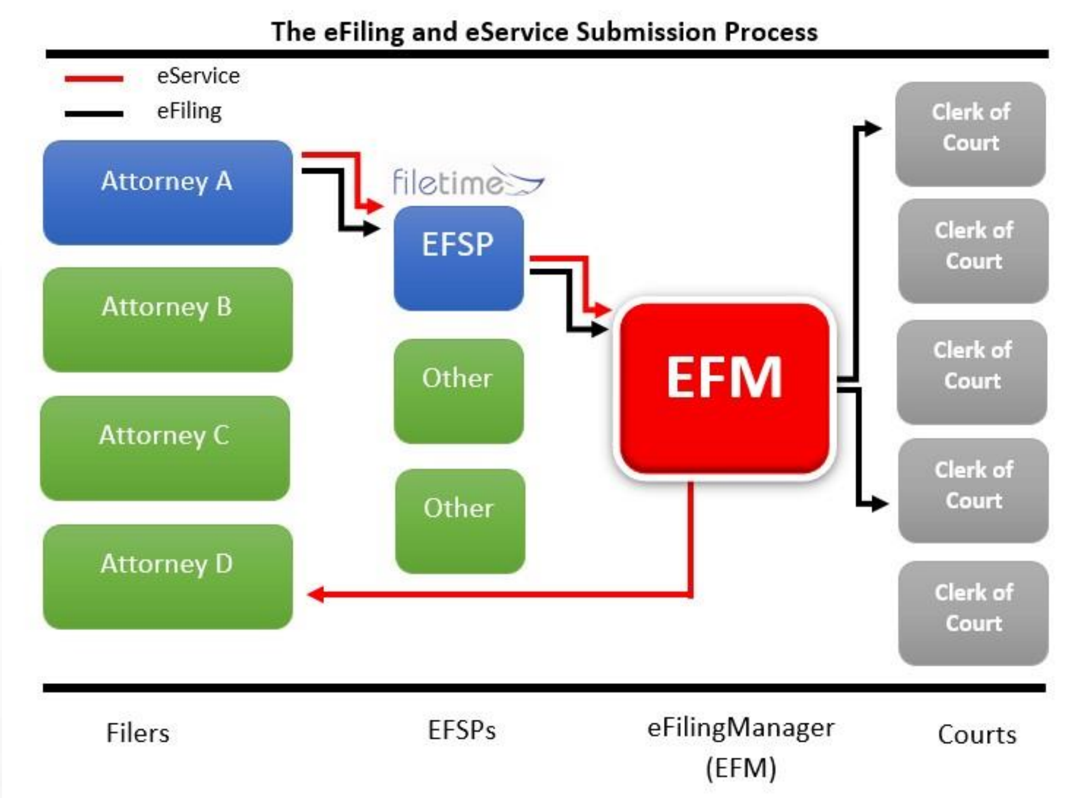

Figure 1-1, The Design and Flow of the eFileManager System

When you login as Attorney A, or on behalf of attorney A, you are logging into the eFileManager system through FileTime, or whichever service 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 eFileManager.

1. eFilings

eFileManager (EFM):

- 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, eFileManager then:

- Submits the final billing for the submission to your credit/debit card issuer,
- Notifies FileTime, and
- Sends the Notification of Acceptance Email to the filer.

2. **eServices**

The flow of an eService is slightly different.

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

eFileManager then:

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

3. **Mandate eService**

Here are the pertinent rules regarding eService:

RULE 21a. METHODS OF SERVICE

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

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

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

(b) When Complete.

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

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

C. Time and Date of Service

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

RULE 21a. METHODS OF SERVICE

(b) When Complete.

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

Chapter 2

II. Two Types of eService

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

A. Service with a Court Filing

When going through the submission process, leave the **Filing Type** default selections of **eFile** and **eServe** (Figure 2-1, A).

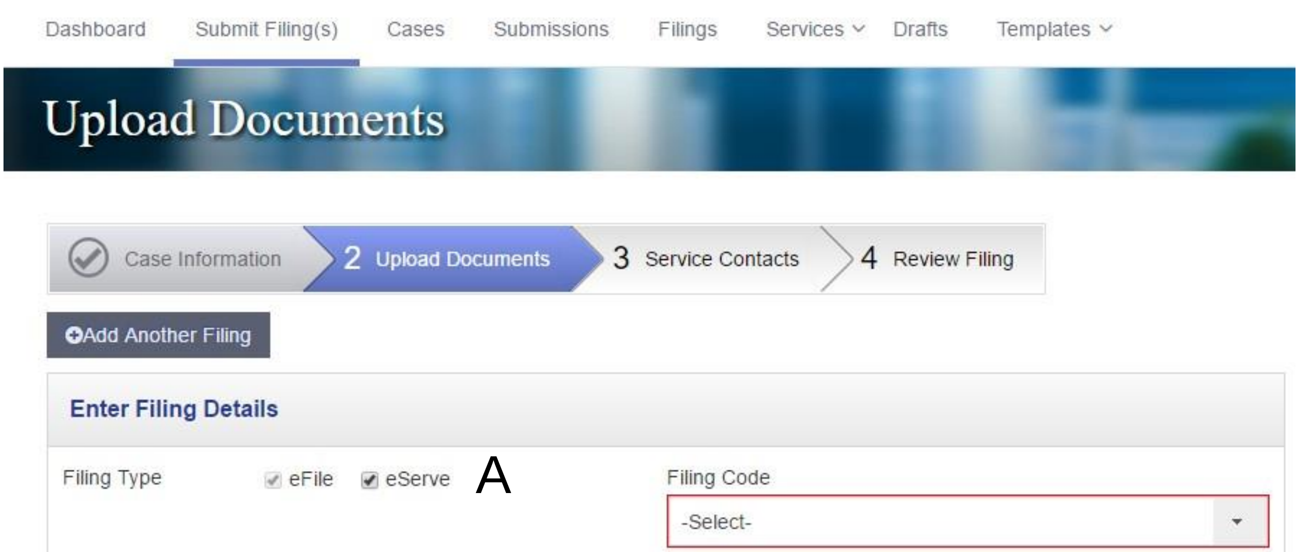

Figure 2-1, Choose Service with a Court Filing

B. Service of Discovery

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

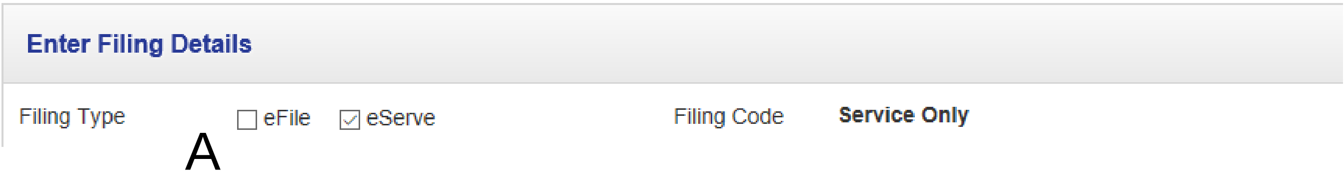

Figure 2-2, Service Without a Concurrent Court Filing

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

Chapter 3

III. Opt-in and Out of eService

You cannot be eServed unless you, or someone on your behalf, opts you in as a service contact for the case. This does not apply to Texas Users.

A. Five Ways to Opt You In for eService

1. By Your Firm eFiling Administrator

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

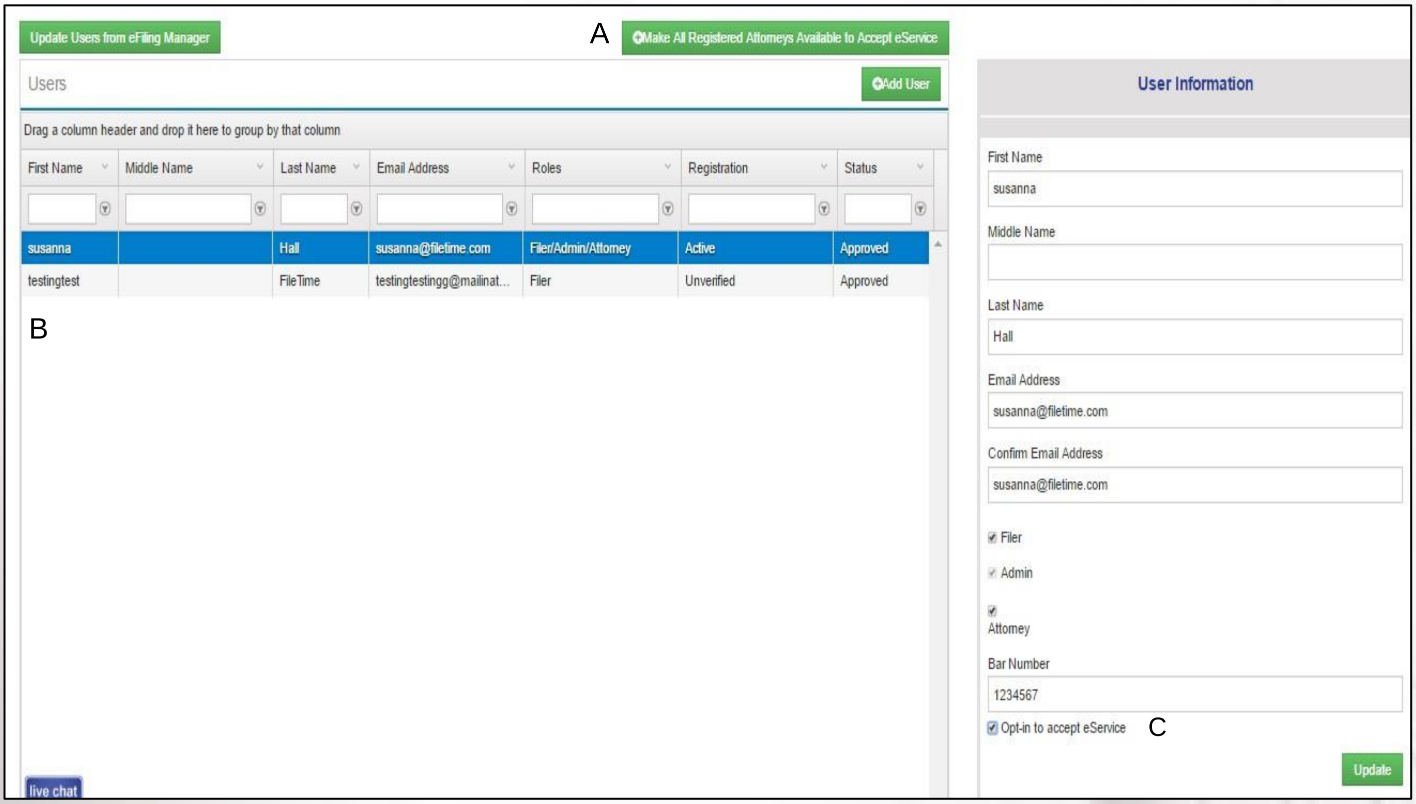

Figure 3-1, Opted In to the Public Service Contact List

The firm eFiling administrator logs in at www.filetime.com, clicks the **Admin** button and then click the **Firm Users** button.

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

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

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

2. Add Yourself to the Public Service Contact List

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

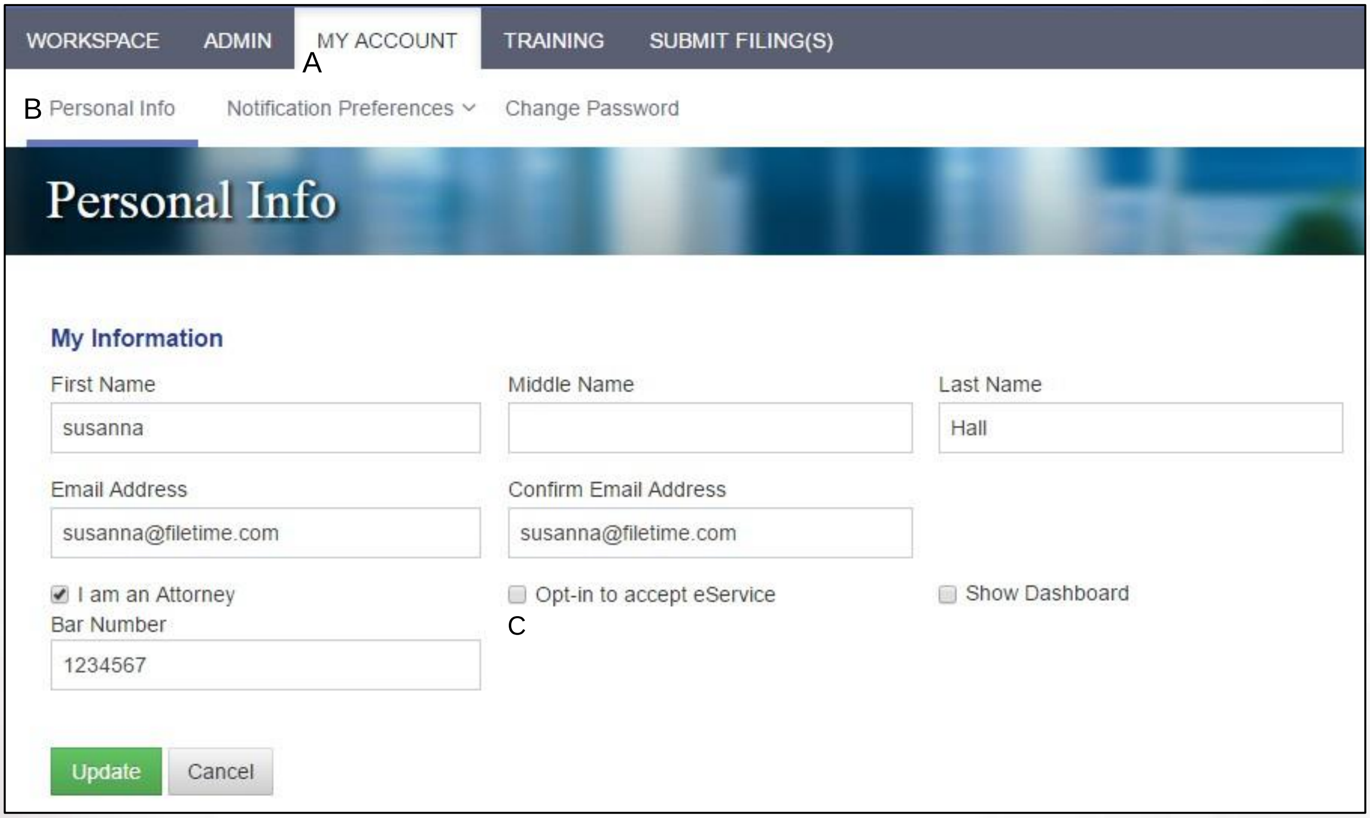

Figure 3-2, Opt Yourself Into the Public Service Contact List

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

By default you will be taken to the **Personal Information** page (Figure 3-2, B).

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

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

3. By Service Contacts Page

This is the most common method of directly adding an attorney, or any other firm member to the Service Contact List.

After logging into www.FileTime.com, click the **Admin** button.

Click the **Service Contacts** Tab, this will give you a drop down, Click on **Firm Service Contacts**

Click **Add Contact**

Click the Opt-in to accept eService button (Figure 3-2, C). You or the attorney you are adding will be added to the eFileManager Public Service Contact List.

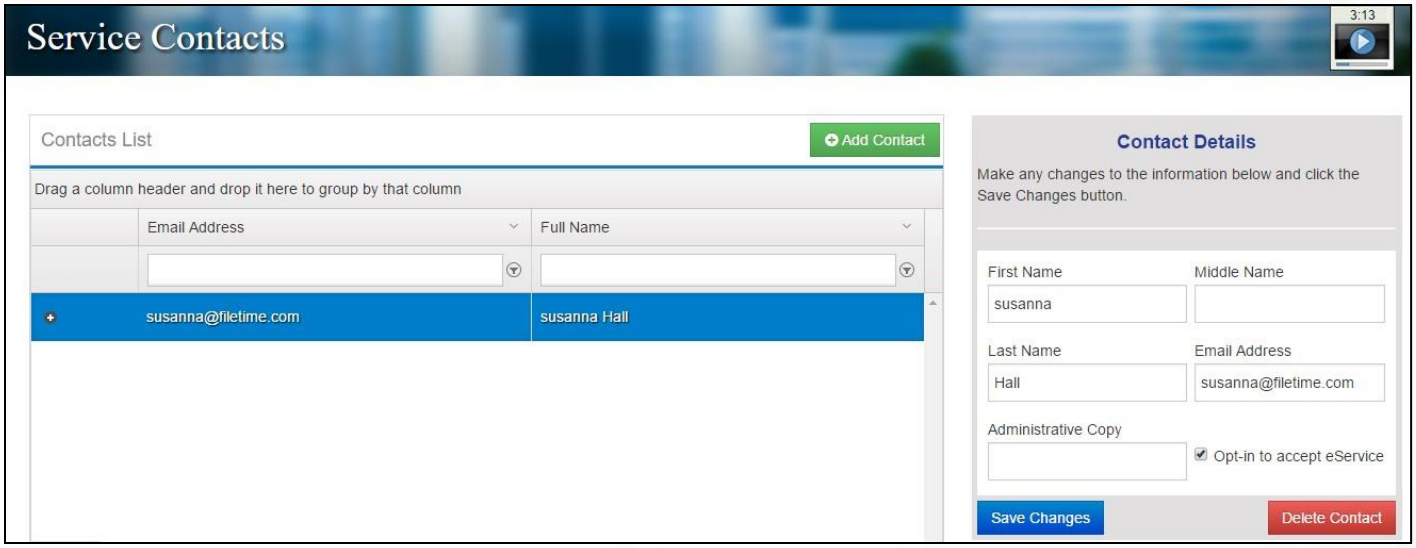

Figure 3-3, Add Firm Service Contact

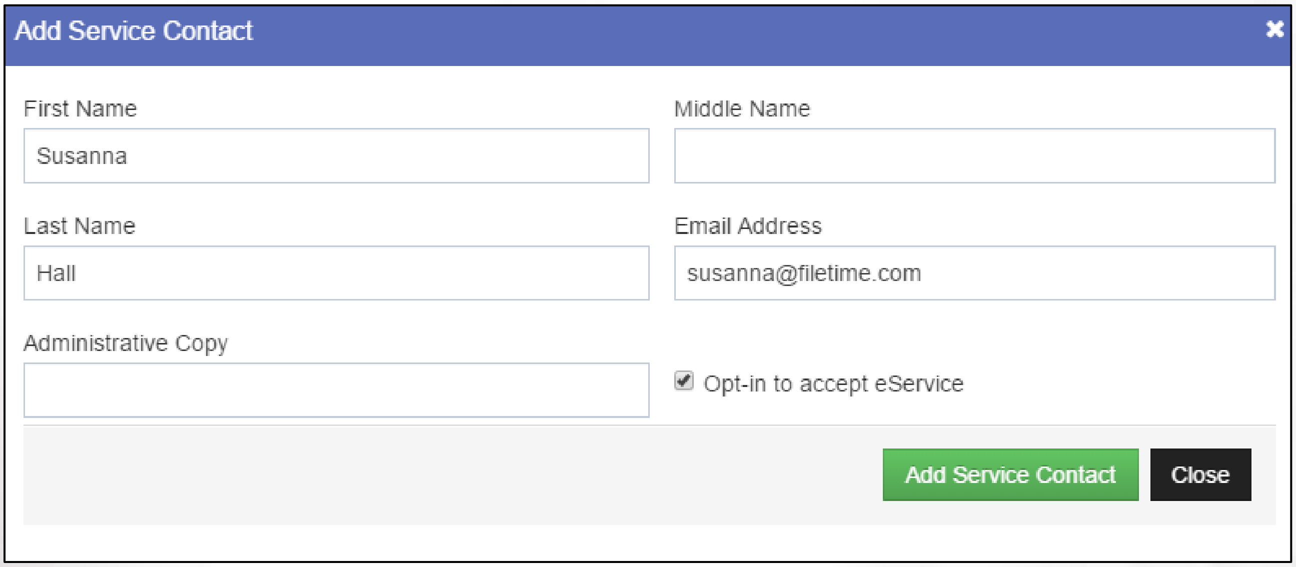

Figure 3-4. Add as a Service Contact pop up

Texas State Bar of Texas Public Service List: *Below is information for the State of Texas*

The State Bar of Texas, among many other things, maintains the Public Service List for the eFileTexas system, so that counsel can be added to a case that they will be eServed in. All details for eService will be pulled from the State Bar of Texas website.

Add Yourself to the Public Service Contact List:

The Texas Supreme Court issued an order in June 2016 requiring that all Texas attorneys provide the State Bar of Texas with an electronic service email address for use in the statewide e-filing system and for other important communications.

Log into your account on www.texasbar.com and provide the email address you would like to use as your electronic service address. Electronic service addresses have been active for the eFiling system since October 1, 2016 and show those addresses are in the Public Service List already. If you did not update your electronic service address by that date, then your preferred State Bar of Texas email address currently on file with the State Bar will be used as your electronic service address until it is changed.

FAQs about the new Public Service.

Here are some tips and facts that may help you better understand how it works:

Can I still put someone as admin copy to receive notifications for my eService?
The State Bar of Texas only provides a primary email address. Administrative copy will not be included.

If you add on your firm service contacts to the case when filing, the administrative copy will receive a copy of service.

How quick will the SBOT update my email address?
Once you change your email on the State Bar of Texas website (SBOT), the change will be made by the next day for eService purposes. The system refreshes to the eFileManager at midnight every night.

What if someone is not registered with SBOT?
Not a problem, you can still add anyone you would like to be eService as a non-firm contact. All you need is their first, last name, email address and firm name.

B. Four Ways to Opt You Out of eService

1. **By Firm eFiling Administrator**
   Your firm administrator can opt you out of the Public Service Contact List by reversing the process explained in A. 1.
   The firm eFiling administrator de-selects the **Opt-in to accept eService** button and saves the changes.
   You are no longer on the eFileManager Public Service Contact List but that does not remove you as a service contact for any cases. It simply prevents counsel from using the Public Service Contact list to add you as a service contact for a case.

2. **Remove Yourself from the Public Service Contact List**
   Reverse the steps in **A. 2.**
   Login at **www.filetime.com** and click **My Account** (Figure 3-2, A) and then **Personal Information** (Figure 3-2, B).
   De-select the **Opt-in to accept eService** button (Figure 3-2, C) and click the **Update** button. You will be removed from the eFileManager Public Service Contact List but that does not remove you as a service contact for any cases. It simply prevents counsel from using the Public Service Contact list to add you as a service contact for a case.

3. **Remove Yourself as a Service Contact During a Submission**
   On the **Service Contacts** page during a submission, click the **Delete from Case** button.

4. **Remove Yourself as a Service Contact Outside of a Submission**
   Go to the Service Contacts tab for the case from which you wish to be removed as a service contact. Find the service contact to be deleted and click the **Detach** button.
   If you find your name on the list of service contacts but there is no **Detach** button, that means that another counsel has added you as a non-firm service contact. Only that counsel's firm or eFileManager can remove you as a service contact for the case.

Chapter 4

IV. Adding eService Recipients to a Submission

Counsel to a case will only be eServed when he/she is listed as a service contact for a case. eFileManager makes no distinction among service contact-types in the system. They consider all counsel associated with a case to be service contacts for the case.

At FileTime we classify case service contacts in three categories:

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

V. Recipient Already Opted In

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

Susanna Hall displays as an eService Recipient for the case. She either opted in while filing for the case or someone added her from the eFileManager Public Service Contact List.

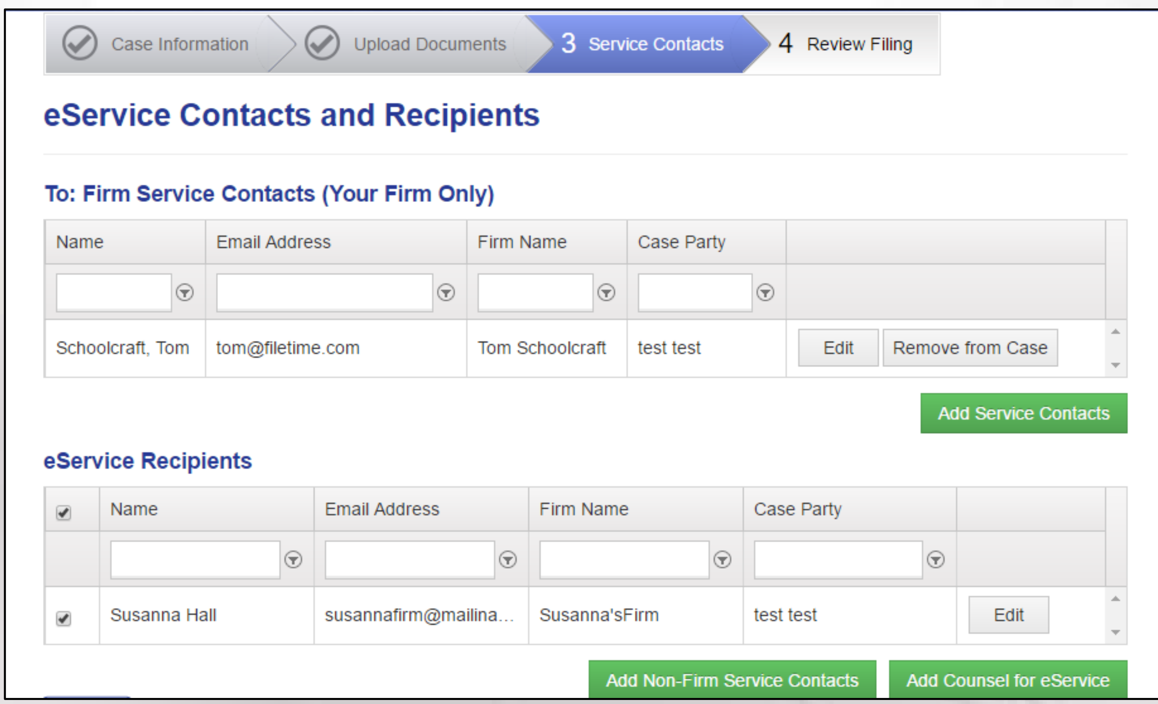

Figure 4-1, One eService Recipient Already Opted In

However, there may be other counsel to the case and we need to add them to the service list. First, check to see if you can add counsel from the eFileManager Public Service Contact List.

B. Add from eFileManager Public Service Contact List

Click the **Add Counsel for eService** button to first search the Public Service Contact List.

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

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

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

Select the **Case Party** represented by the counsel.

Click the **Save and Close** button.

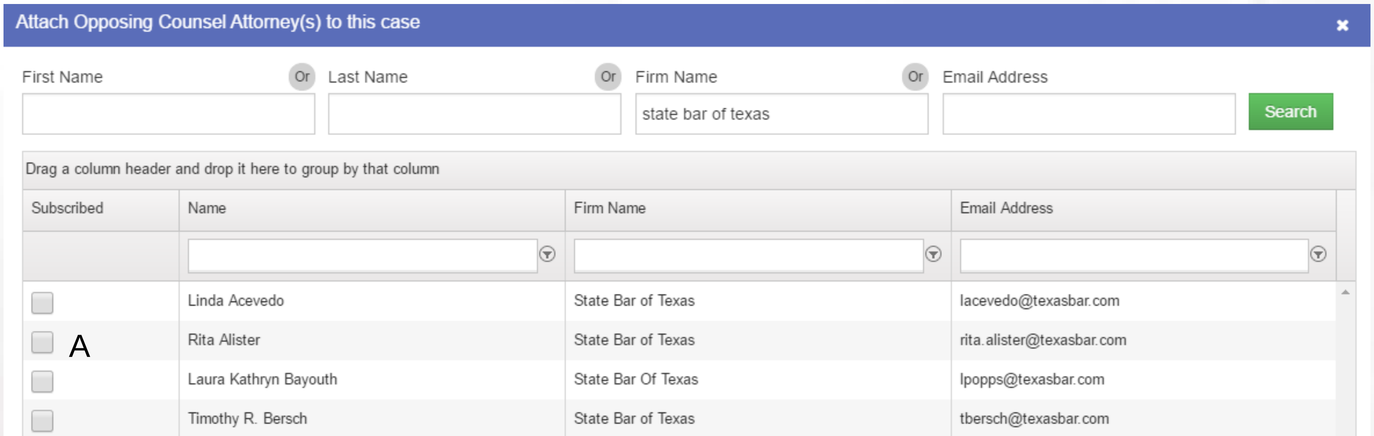

Figure 4-2, Adding Counsel from the Public Service Contact List

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

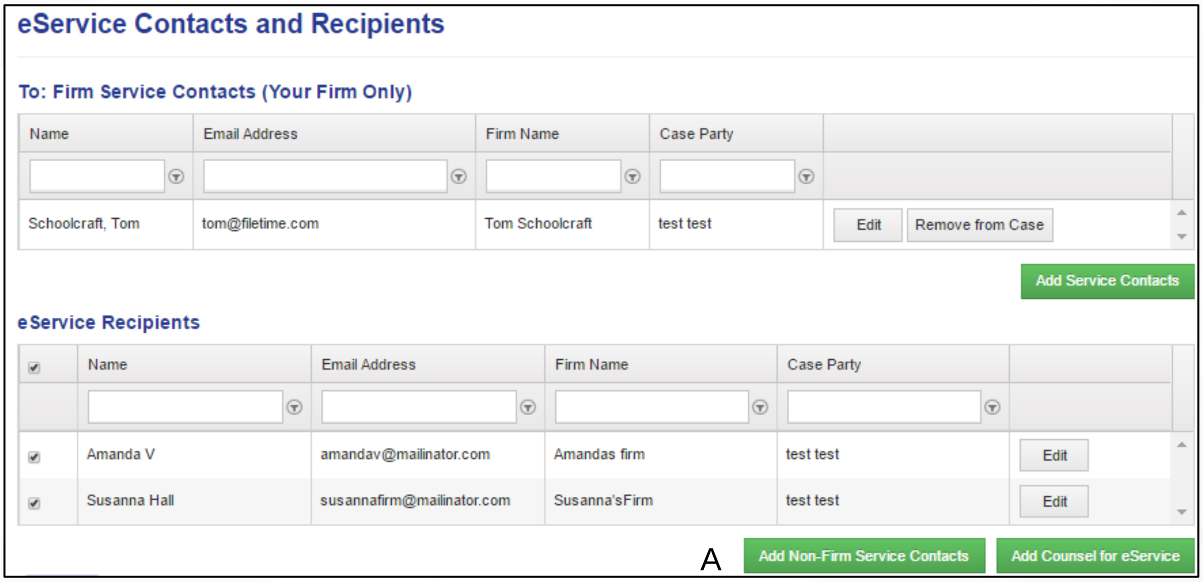

Figure 4-3, Counsel Added

However, if the search of the Public Service Contact List did not find the names you are looking for, the next step is to see if we can add them as Non-Firm Service Contacts or, as a last resort, add one, or both, as Fax Service recipients.
Click the **Add Non-Firm Service Contacts** button (Figure 4-3, A).

C. Add Non-Firm Service Contact

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

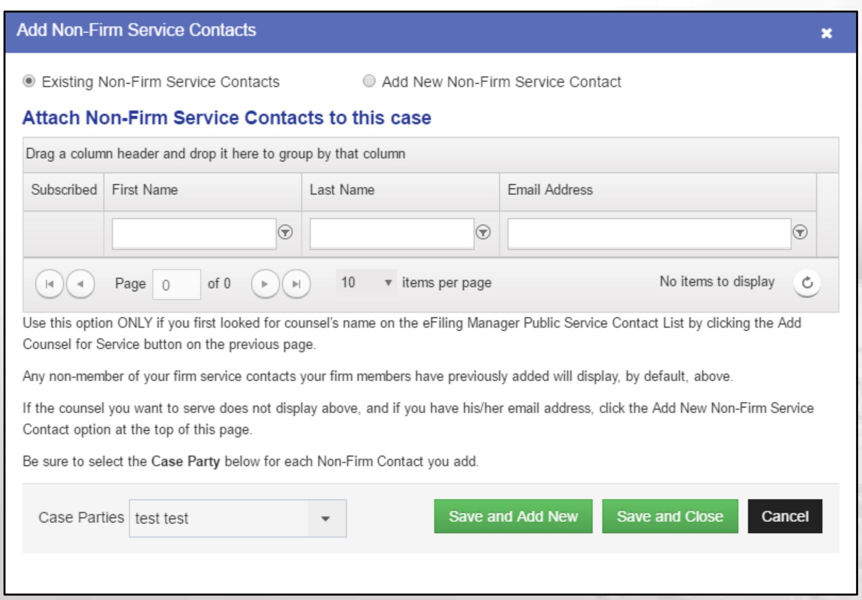

Figure 4-4, Attaching a Non-Firm Service Contact

By default, you are shown all the Non-Firm Service Contacts (Figure 4-4) that have been added by your firm members to your firm's list of Non-Firm Service Contacts and you may not have any added like you see above.

This list is composed of counsel:

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

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

Click the **Add New Non-Firm Service Contact** option (Figure 4-5, A**)**

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

Select the party represented by that counsel.

Click the **Save and Close** button.

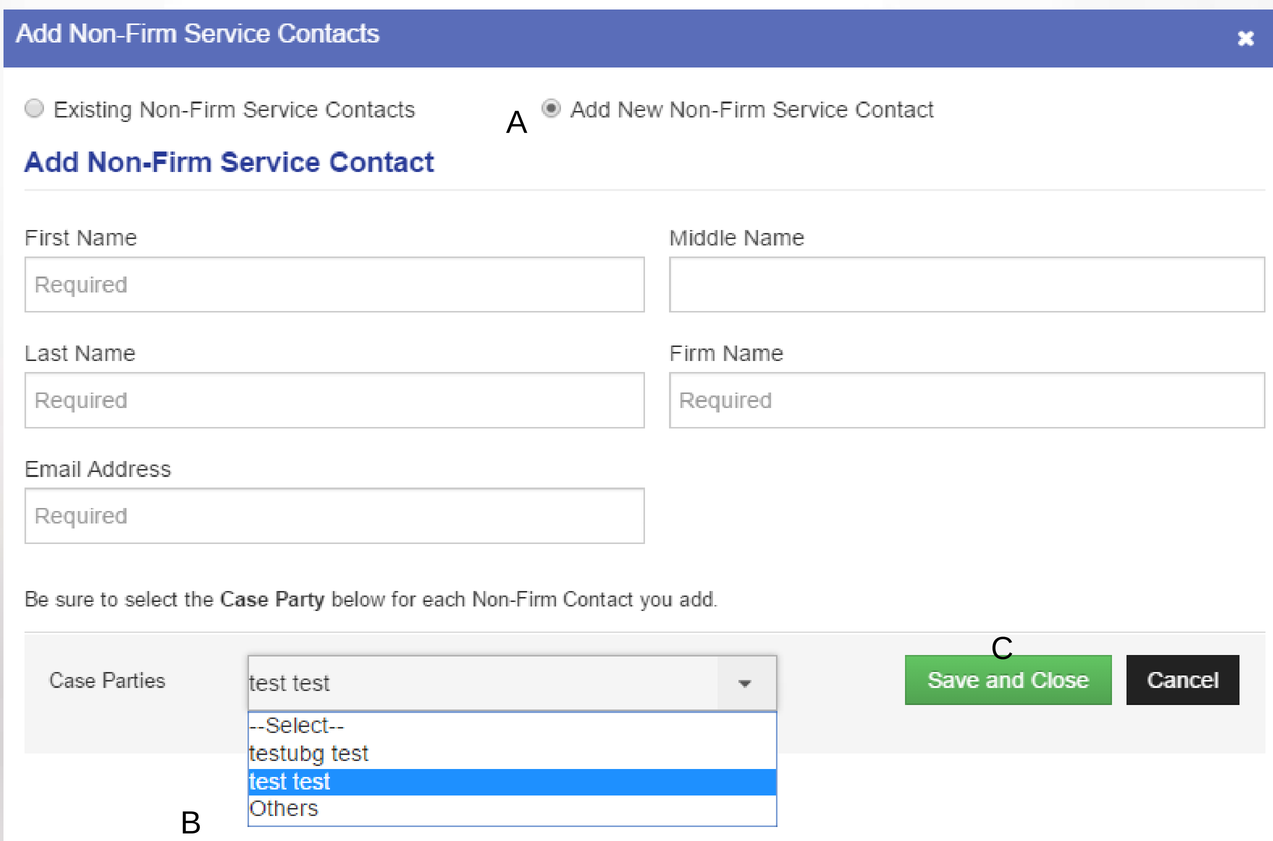

Figure 4-5, Adding New Non-Firm Service Contact

The newly added Non-Firm Service Contact now displays as an eService Recipient for the case (Figure 4-5).

Figure 4-6, Fax Service

D. Add Fax Service Recipients

If you cannot find the opposing counsel in the Public Service List or do not have their email address. You can send Service via Fax.

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

On the **Add Fax Service** page (Figure 4-7), add the name and fax number and click Save and Close to finish or Save and Add New to add another fax number.

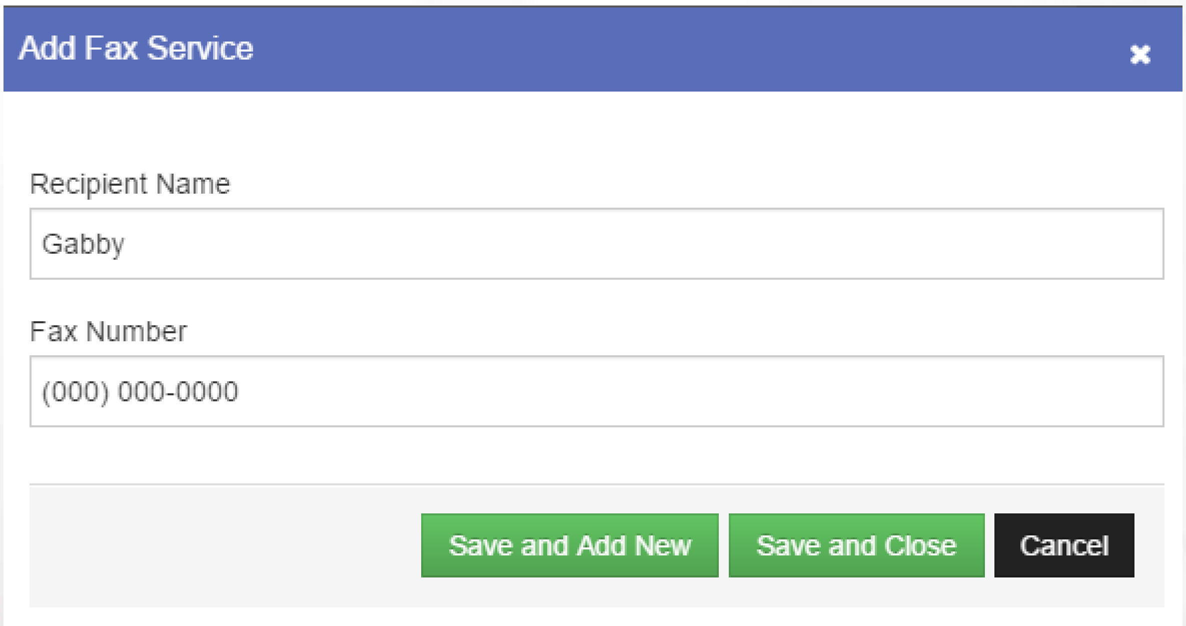

Figure 4-7, Add Fax Service Recipient

Once Service contacts page is completed:
Click the **Next** button at the bottom of the page to continue to the **Submission Review** page.

Chapter 5

V. Preparing Your Certificate of Service

A. Generic Certificate of Service

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

The two most common variations that we have seen are:

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

(or)

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

B. Check the Case Service Contact List

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

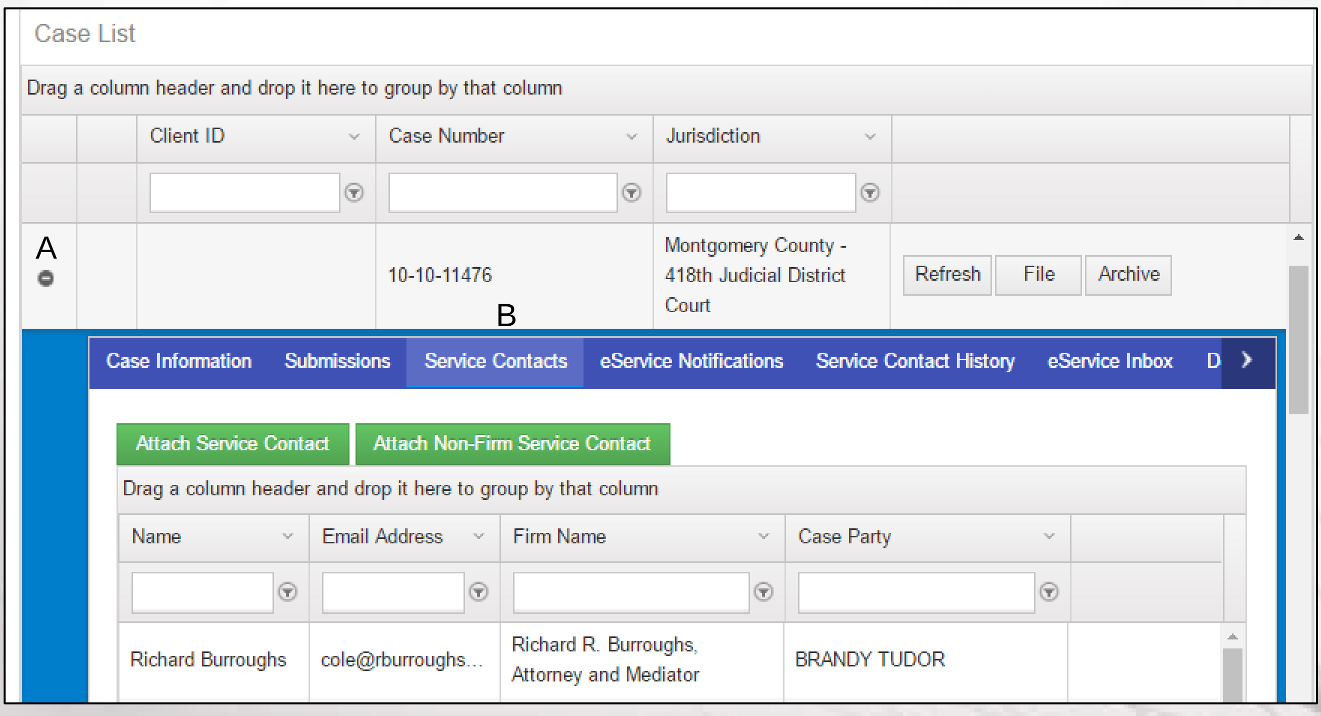

Figure 5-1, Case Service List

Go to Cases Tab.

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

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

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

Those with no Detach button have been opted in for eService by other counsel and you cannot change or remove them.

C. Check the Public Service Contact List

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

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

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

Figure 5-2, Public Service Contact List Search Feature

On the **Search eService Contacts** page (Figure 5-3), enter any part of the **First Name** (Figure 5-3, A), and/or **Last Name** (Figure 5-3, B), and/or **Firm Name** (Figure 5-3, C) and click the **Search** (Figure 5-3, D) button.

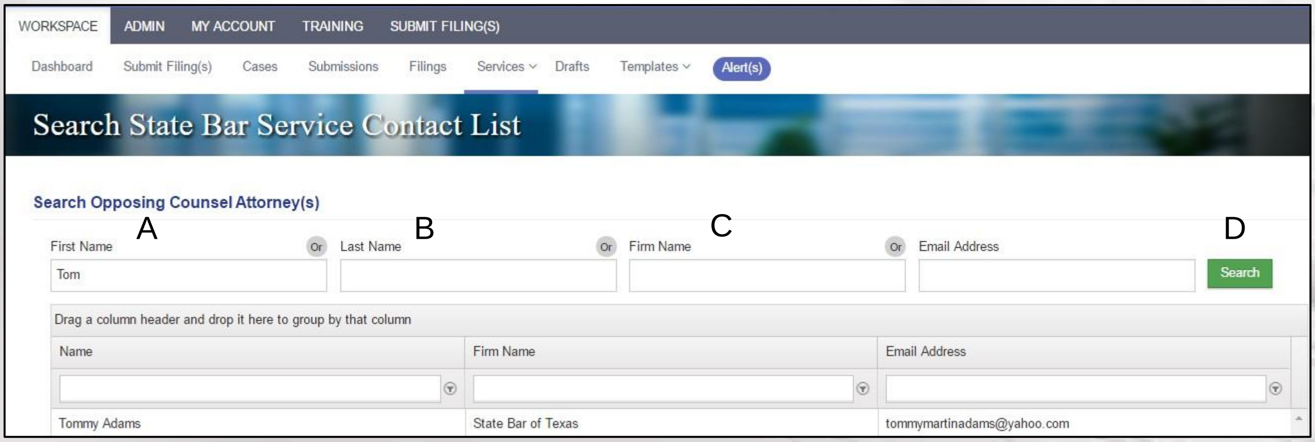

Figure 5-3, Search the Public Service Contact List

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

D. Add Non-Firm Service Contacts

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

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

E. Add Fax Service Recipients

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

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

Chapter 6

VI. Print Your Proofs of Service

A. Print Your Proof of eService

The simplest way it to go to print your Proof of Service from the eService Outbox.

From the **Workspace**, click the **Services** button and then **eService Outbox** on the drop-down menu.

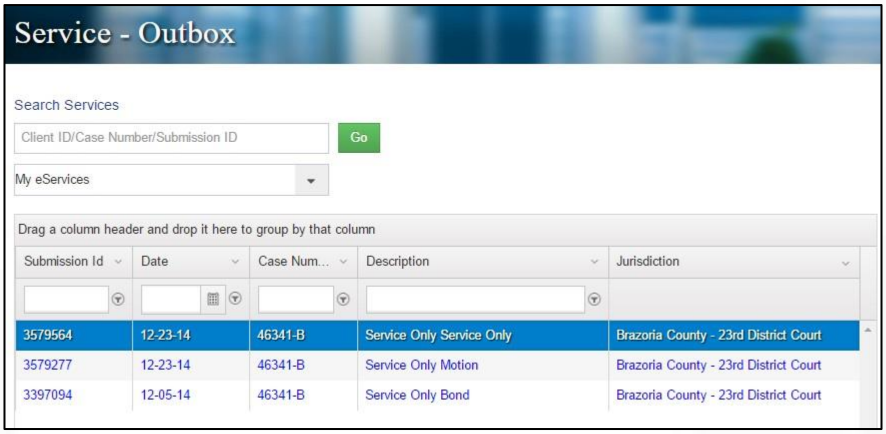

Figure 6-1, eService Outbox

On the **Service - Outbox** page (Figure 6-1), make sure to select whether you are searching for service by yourself or by another firm member (Figure 6-2, A).

Click on the eService for which you want to print the Proof of Service so it highlights.

That opens the **eService Details** section in the right column.

Click the **Print Proof of Service** button (Figure 6-2, B).

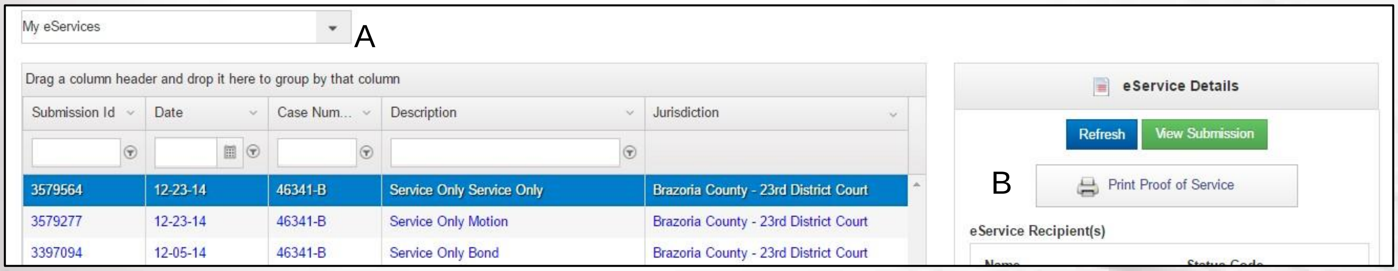

Figure 6-2, Print Proof of Service

B. Print Your Proof of Fax Service

From the **Workspace**, click the **Services** button and then **Fax Service Outbox** on the drop-down menu. Very similar as Figure 6-2.

The **Fax Service - Outbox** page opens.

Click on the Fax Service for which you want to print the Proof of Fax Service so it highlights.

That opens the **Submission Details** section in the right column.

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

Chapter 7

VII. eService Notification Emails

A. eService Notification Emails

eFileManager also sends four different notification emails regarding eService issues. Below are examples of what notifications look like in Texas. These could change depending on your state.

1. **Notification of Service**

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

EFILE TEXAS.gov	**Notification of Service**
	Envelope Number: **84010**

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

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

Document Details	
Lead File:	$$$leaddocumentfilename
Lead File Page Count:	$$$leaddocumentpagecount
File Stamped Copy:	**https://www.efiletexas.gov/ViewServiceDocuments.aspx?ADMIN=0&SID=262f09eb-76f9-49f0-8478-58b01cd4b249&RID=66ceea5e-9712-463a-97dd-bd866257a826** This link is active for 7 days.

Above find an email specific to Texas. However, this is the structure you will see regardless of the state.

2. **Copy of Notification of Service**

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

EFILE TEXAS.gov	**Copy of Service** Envelope Number: **84010**

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

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

Document Details	
Lead File:	$$$leaddocumentfilename
Lead File Page Count:	$$$leaddocumentpagecount
File Stamped Copy:	**https://www.efiletexas.gov/ViewServiceDocuments.aspx?ADMIN=0&SID=262f09eb-76f9-49f0-8478-58b01cd4b249&RID=66ceea5e-9712-463a-97dd-bd866257a826** This link is active for 7 days.

3. eService Failed

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

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

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

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

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

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

How to resolve a Failed Filing:

Although, it may not be this exact reason. We have found this to be the most common. The simplest way to resolve the issue is to print the document, scan it, save it as a new PDF file with a name that contains only alpha-numeric characters. If you have access to Adobe PDF, you can PRINT TO PDF which will essentially do the same thing. This will make the document(s) non text-searchable.

To make the document text-searchable you can OCR it or upload it to FileTime and let our document converter make it text-searchable for you (only available to you if your firm is on one of our pay-per-submission plans).

If it is not practical to scan your documents, you will need to systematically examine each one to determine the causal factor and resolve it. Take these steps in order:

- Check the name of each document and make sure there is nothing but alpha-numeric characters (a-z, 1-0) in the name(s).
- Open each document and ascertain that they do not contain any security features.
- Open each document and make sure you do not see the known invalid fonts. Press CTRL and the letter D at the same time to see the properties. The fonts will tell you if it is invalid.

For more information on this issue, please click on the link below or call our customer support team at (800)658-1233:

http://feedback.filetime.com/knowledgebase/articles/612483-how-to-resolve-a-failed-filing

4. Filing Returned - 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.

	Filing Returned
	Envelope Number: **84010**

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

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

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

B. FileTime eService Notification Emails

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

1. eService Status

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

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

filetime

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This updates you with the status of service to counsel for the following submission:

Submission ID: 109242

Old Submission ID:

Submission Date and Time: 03/30/15 10:12 AM

Case Title: In the Matter of the Marriage of Rhonda Osagie and Kingsley Osagie

Court: Fort Bend County - 328th Judicial District Court

Cause Number: 13-DCV-209661

Client ID: FT2014-1110

Client: Kingsley Osagie

Filing(s)

No Fee Documents

No Fee Documents

Service Status

Status	Recipient	Serving Firm
Served	Thomas Schoolcraft	Law Office of Kindra Reese
Served	Kenneth Williams	Williams and Williams

2. Copy of eService

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

Subject: Notification of Service for Case No.DC-14-12214

eServed for Case No. DC-14-12214
Date and Time Filed: 05/15/15
Served To:
From Filer: Charles Smith
From Filer Firm: Smith, Peabody, and Brown

You may retrieve the service document using one of the following two methods:

1. Download Document – Click this link now to download the document
https://www.efiletexas.gov/DownloadResource.ashx?RID=022e9c6b-811d-41fe-be54-fc4bfac03f89

2. Login at www.filetime.com, go to eServices > Inbox, locate this eService and click on it to view the service details and print the service document(s).

You can log in to www.filetime.com anytime from anywhere and download this document.

C. FileTime Fax Service Notifications

1. Fax Service Successful

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

filetime — Fast and Reliable

RE: Client ID - FT141204
Dear Thomas,
Your fax service to:

- Recipient – Harold Cumby
- Fax Number – (888) 859-2349
- Case Number - DC-14-12214
- Jurisdiction - Dallas County - 191st District Court
- Filing Code - Motion (No Fee)(Consent and Agreement.pdf)

Was successfully delivered on 01/12/2015 08:53 AM.
Thanks for using FileTime Fax Service.

Best Regards,
The FileTime Team
www.filetime.com

Contact Us

800-658-1233
Support@FileTime.com

2. Fax Service Failed

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

filetime

Fast and Reliable

RE: Client ID - FT-20140116

Dear Thomas,

We were not able to deliver your fax service to:

- Recipient – Alex Kankas
- Fax Number – (210) 555-5555
- Case Number - DC-00-00143
- Jurisdiction - Dallas County - 14th District Court
- Filing Code - Service Only((1)One.pdf) Service Only((2)Two.pdf)

The reason for the failure was not reported us by our faxing service. But, if you suspect that it was due to a wrong number you can retry by following these steps.

- Login at www.filetime.com
- Go to **Filings** and locate the filing.
- Click the green **View Filing Details** button.
- Click the **Retry** button in the **Fax Service** area at the bottom of the **Filing Details** page.
- Enter the corrected fax number on the **Edit Fax Service** page and click **Save**.
- FileTime will resend the fax service to the corrected number.

Thanks for using FileTime Fax Service.

VIII. Retrieving Service Documents

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

A. Click the document link in the eFileManager Notification of Service email or

B. Access the document in your FileTime eService Inbox. This method enables you to view the eServices to any registered member of your firm.

C. View the eServices received by your firm by case from the Case Tab, by selecting the desired case and then clicking on eService Inbox. Any registered firm user can review the eServices by case.

A. eFileManager Notification Email

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

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

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

Document	
File Stamped Copy	**https://filerstage.efiletexas.gov/ViewSer-viceDocuments.aspx?ADMIN=0&SID=cfb 79 498-24cc-4b0a-acf1-d2e44334eb3a&RID=d- 840f54b-87d6-43af-bd50-3fd3f3bd313a** This link is active for 7 days.

This link is valid for seven days only.

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

B. FileTime eService Inbox

The FileTime eService Inbox feature saves the service document(s) associated with each eService to you for an extended period of time whereas eFilingManager deletes them after 7 days.

From the **Workspace** Figure 8-2, A, click **Services** on the sub-navigation bar and from the drop down menu, select **Inbox** (Figure 8-2, B).

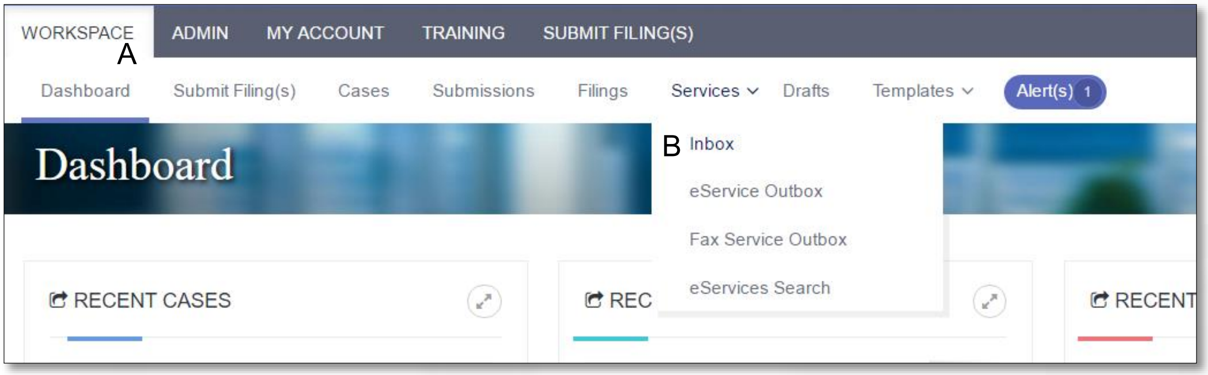

Figure 8-2, Access the eService Inbox

You can type in the case number to find an eService related to a specific case or leave it blank to see all eServices. From the drop down, you can also select specific people that you wish to see eServices for (Figure 8- 3, A). The drop down is defaulted to show My Services.

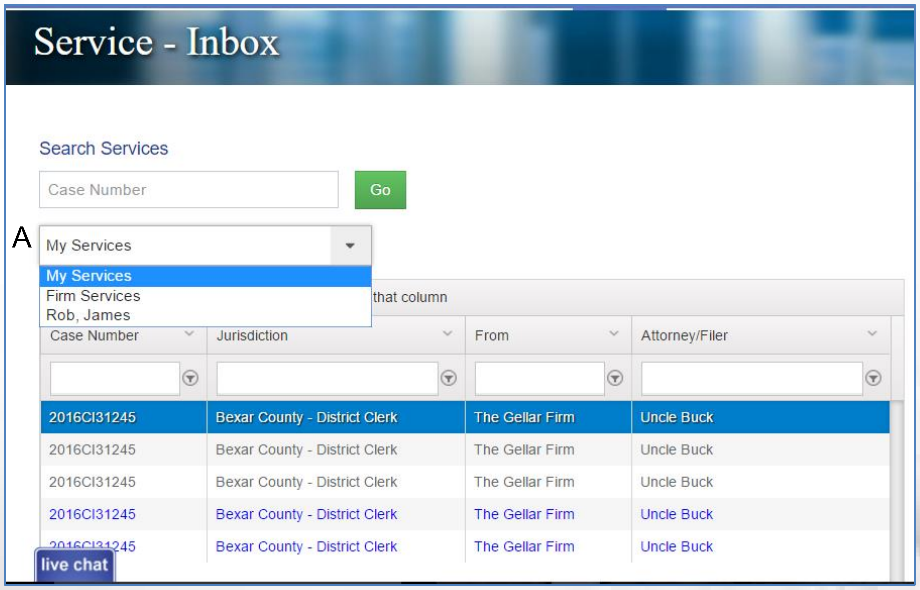

Figure 8-3, Select Service Contact for Viewing eServices

You can also type in a name and let FileTime find the name of the list for you - especially helpful if your firm is large.

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

On the **Service - Inbox** page (Figure 8- 4)**,** find the eService for which you want to print the service document(s) and click the row to highlight it (Figure 8- 4, A). You will see details of that service in the eService Details Box that opens on the right side of the page (Figure 8- 4, B) .

In the bottom of the **eService Details** section you will find a blue hyperlink (Figure 8- 4, C) to click and download the service document(s). Example below "(3)Three.pdf"

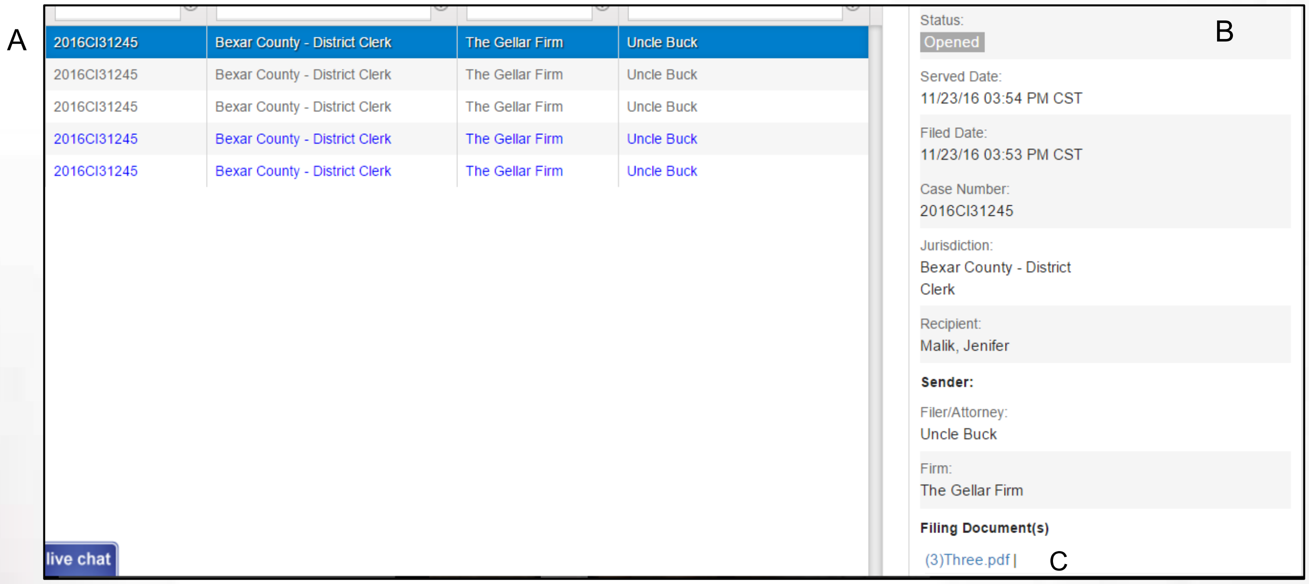

Figure 8-4, Print the Service Document(s)

C. eService Inbox on Cases Tab

Any firm member can view all eServices received by your firm, by case, in the FileTime Case eService Inbox. And, FileTime saves the service documents for 3 years.

Click on **Workspace** and from the sub-navigation bar, Click on **Cases** Tab

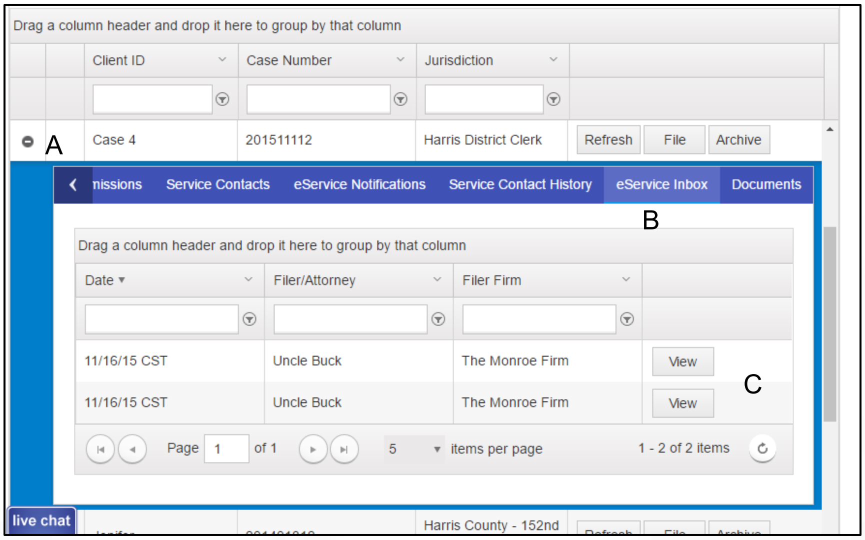

Figure 8-5, eService Inbox from Cases Tab

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

Once you find the case, click the **+** (Figure 8- 5, B)in the far left, beside the case number to allow a sub navigation bar to pop-down. Click the **eService Inbox** tab (Figure 8- 5, B).

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

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

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

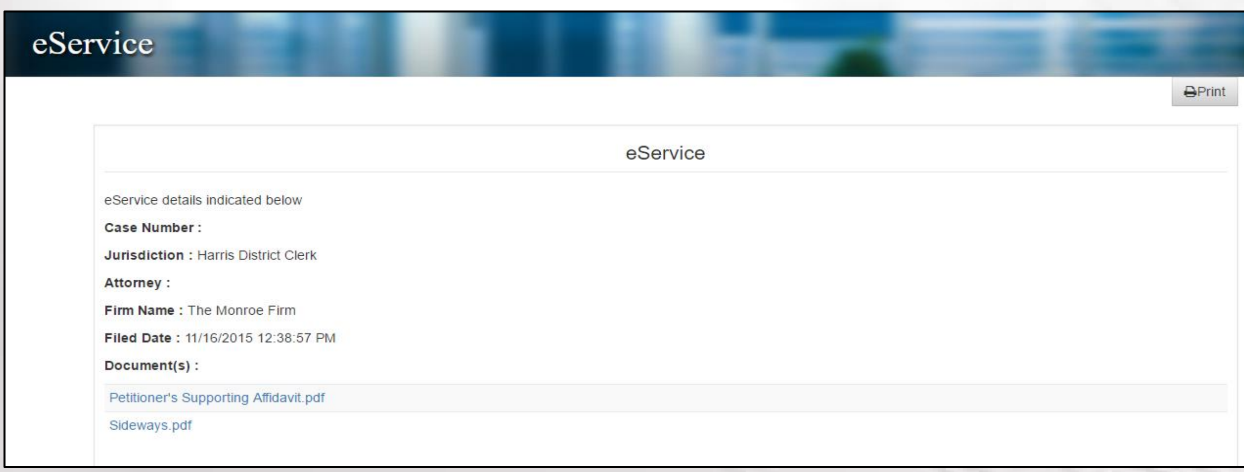

Figure 8-6, eService Details

Click the blue hyperlink(s) to the document(s) to view them or click the **Print** button to print the document(s).

Chapter 9

IX. FileTime Fax Service

A. FileTime Fax Service Cover Letter

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

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

TRCP 21a. - Service by Telephonic Transfer

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

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

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

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

Figure 9-1, FileTime Fax Service Cover Letter

B. FileTime Fax Service Outbox

Click on Workspace and on the Sub Navigation bar click on Services. Select **Fax Service Outbox** on the drop-down menu (Figure 9-2, A).

Be sure to select the correct person for whom you want to check the Fax Service Outbox.

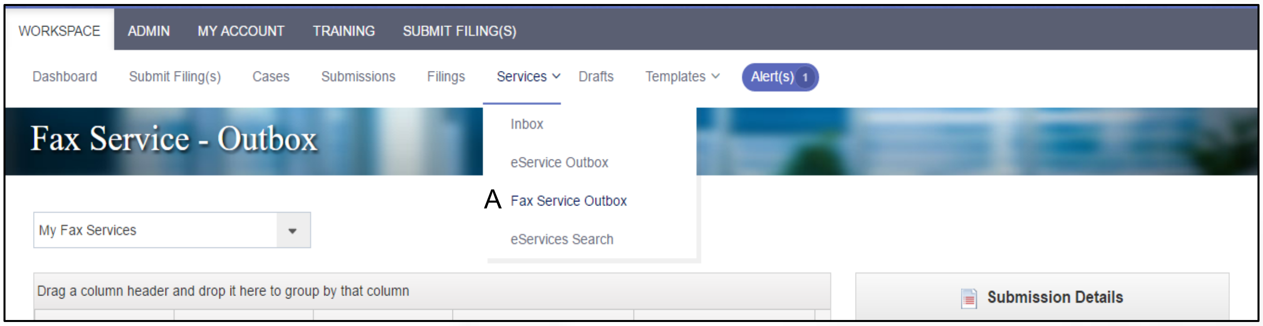

Figure 9-2, Navigate to the Fax Service Inbox

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

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

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

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

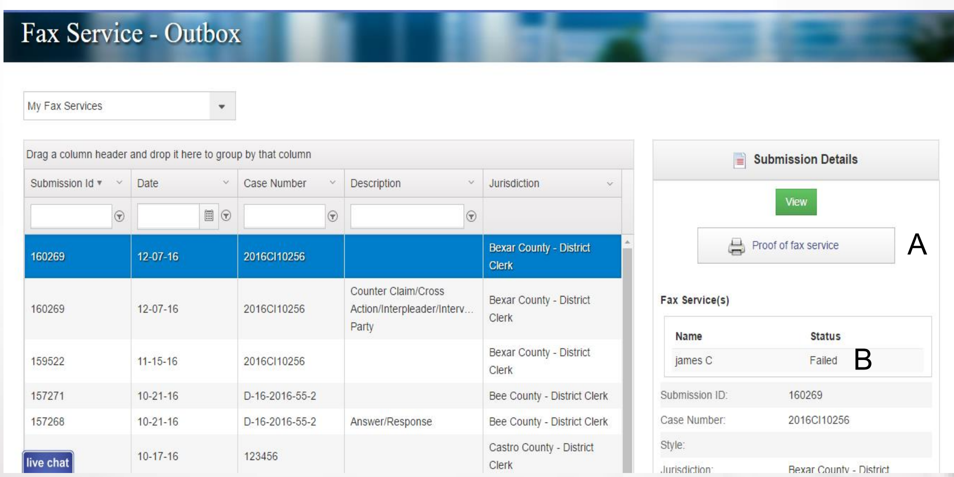

Figure 9-3, Fax Service - Outbox

Chapter 10

IX. Possible eService Issues

A. Not Receiving Notification Emails

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

1. Spam Filters Out Your Emails

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

You should white list the following email addresses:

- EFM email addresses,
- Support@filetime.com

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

2. You Are Being eServed to an Inactive Email Address

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

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

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

B. Can't Delete Attorney from Case Service List

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

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

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

C. Can't See eServices in My Inbox

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

Chapter 11

X. Managing Service Contacts and Service Recipients

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

A. Manage Your Firm Contacts Outside of a Filing

After logging into your firm account, Click on **Workspace** and from the sub-navigation bar click on **Cases.**

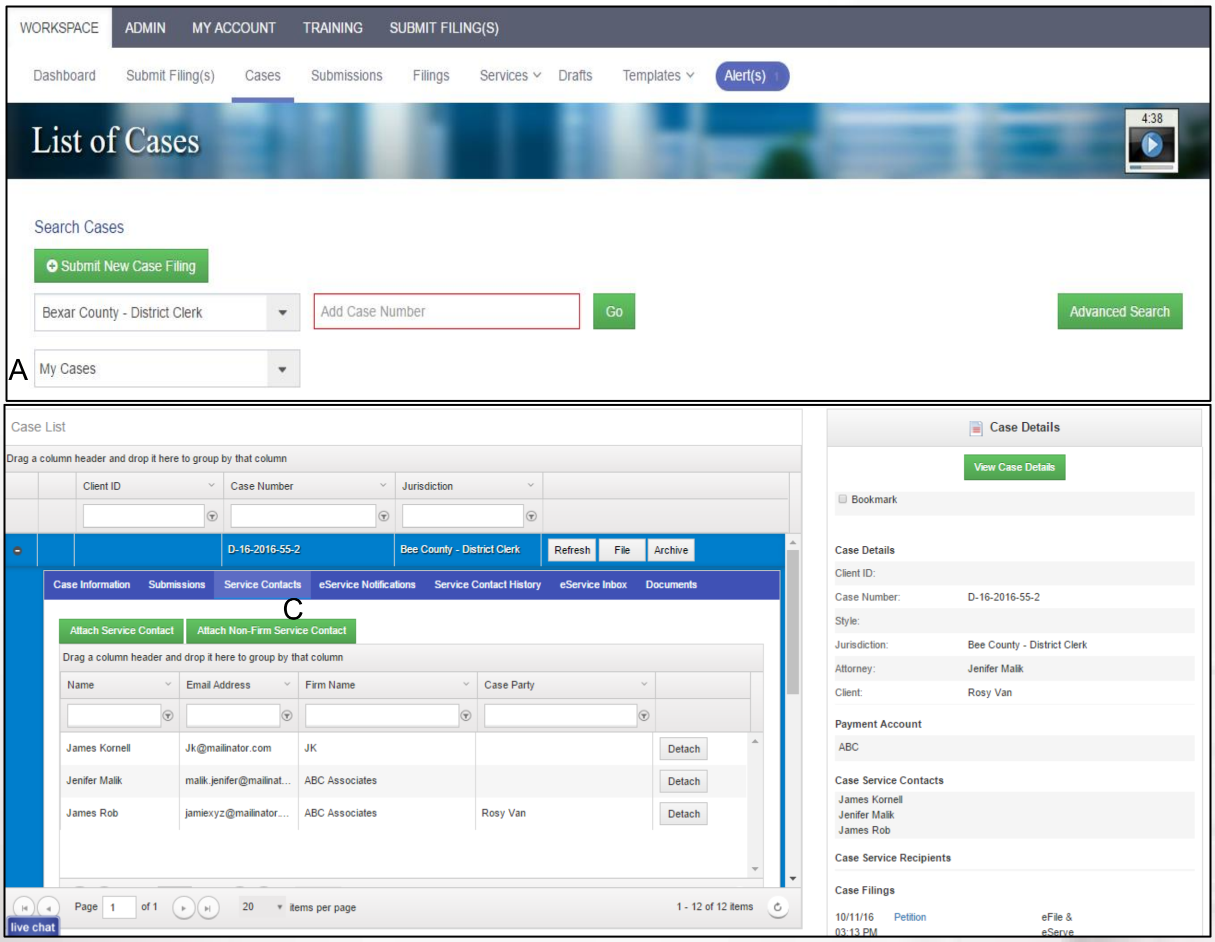

Figure 11-1, Case Service Contacts

By default, FileTime displays for you only your own cases (Figure 11-1, A). You can click the drop-down arrow to select to view all of your firm's cases or all the cases your firm has archived. Find the case for which want to view or manage the service contact list. Click on + (Figure 11-1, B) which turns into a - once opened. Click the **Service Contacts** tab (Figure 11-1, C)

.

eFileManager only allows you to delete your firm's service contacts so any of your firm's service contacts that you have assigned to the case will show the **Detach** button in the actions column.

Any case service contacts for counsel will be blank in the actions column.

Click the **Attach Service Contact** button to attach a service contact for your firm to this case.

B. Managing Service Contacts and Cases

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

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

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

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

Figure 11-2, Firm Service Contacts

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

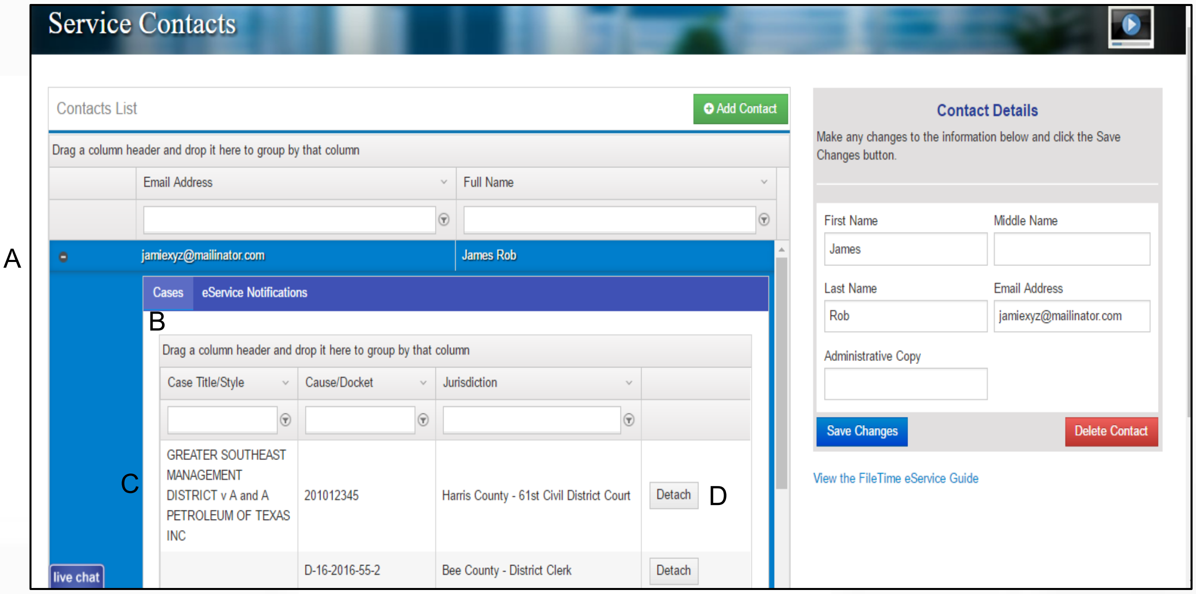

Figure 11-3, Cases Associated with the Service Contact

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

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

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

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

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

Chapter 12

XII. Managing eFiling and eService Notification Emails

eFileManager and FileTime email send many 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 eFileManager system.

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

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

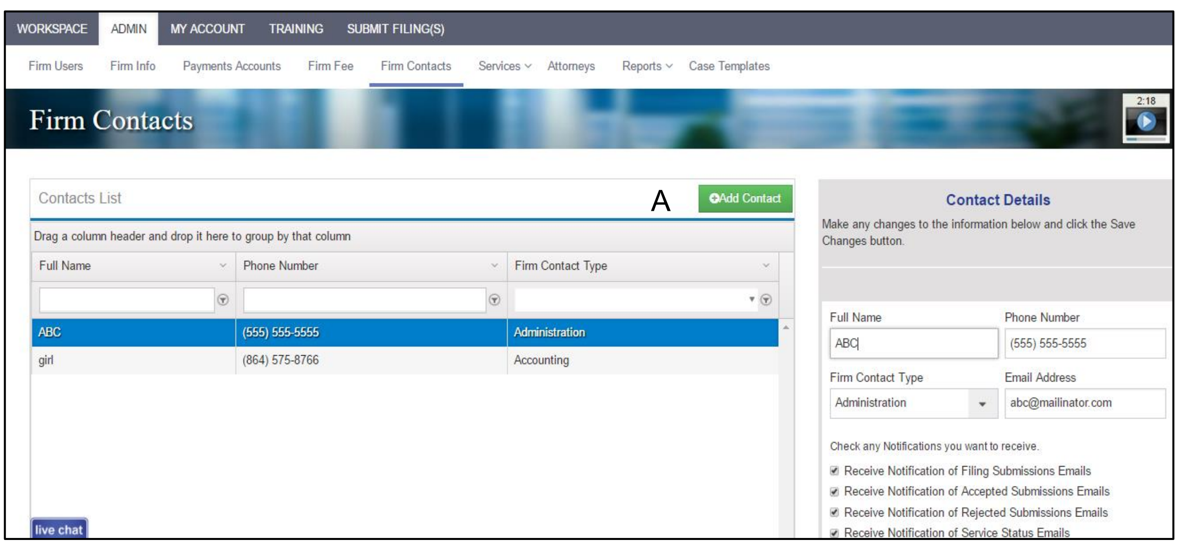

Figure 12-1, Set Up Firm Contacts and Notification Email Preference

1. Add a New Firm Contact

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

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

- Leave the default of **New Contact** (Figure 12-2, A) if you are adding a new person to the list.
- Enter the name and email address of the contact.
- Select the closest match for **Firm Contact Type**.
- Check any of the Notifications eMails you want the contact to receive (Figure 12-2, B).
- Click the **Add Firm Contact** button when done.

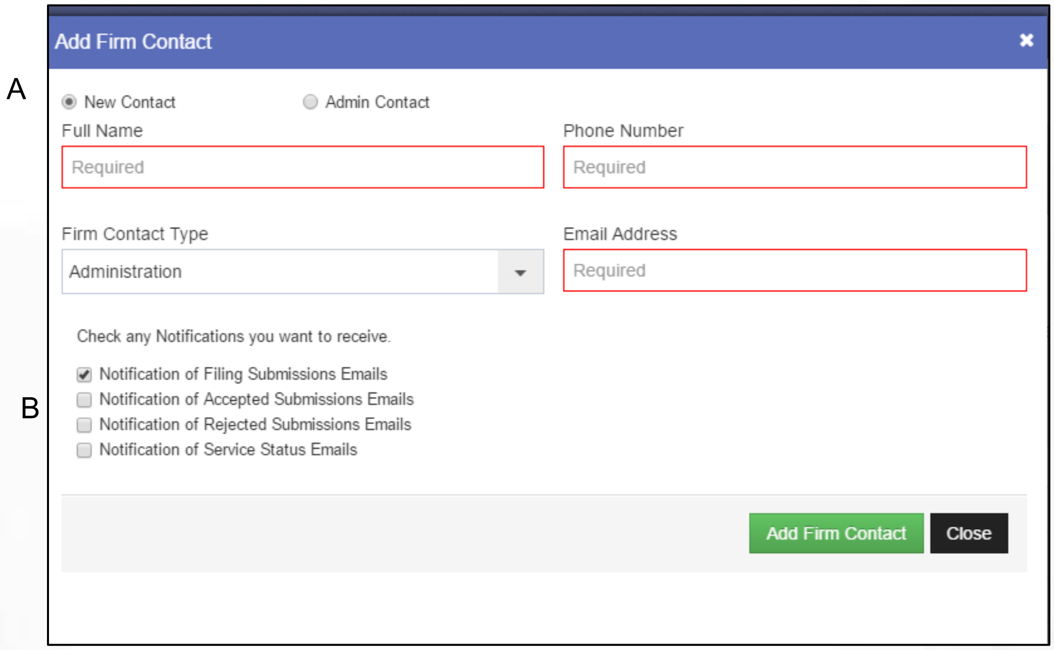

Figure 12-2, Add Firm Contact

2. **Edit an Existing Firm Contact**

Any existing **Firm Contacts** will display.

Click the name of the Firm Contact you wish to edit. It will be highlighted. Make any changes needed in the name, email address, and/or **Firm Contact Type**.

Check or uncheck any notification emails 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 on the top navigation bar and then click the **Service Contacts** button on the sub-navigation bar.

On the drop-down menu, click **Firm Service Contacts**.

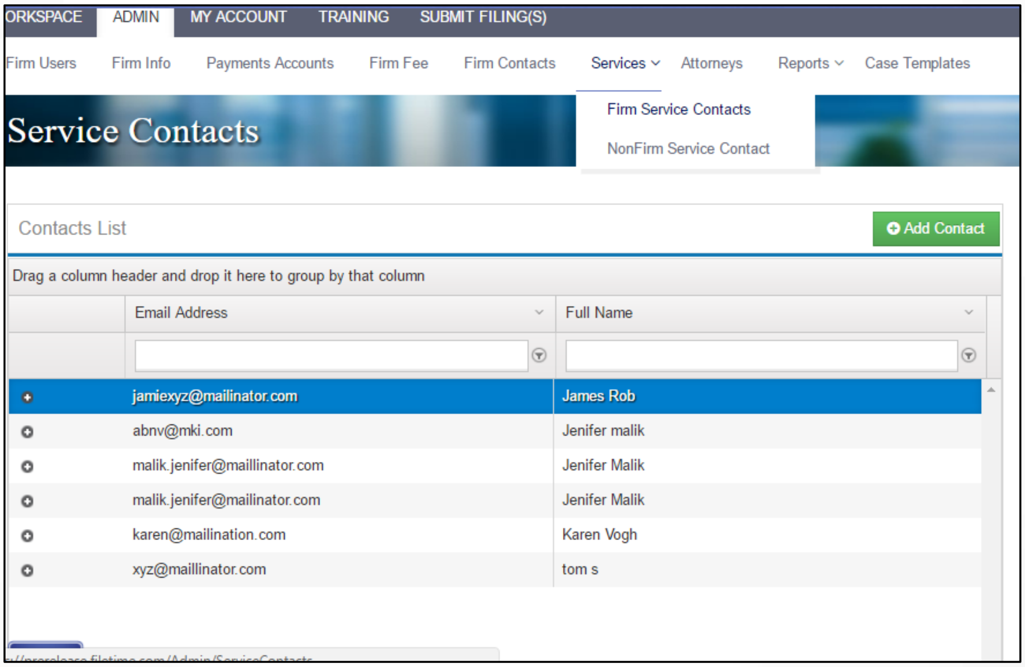

Figure 12-3, Add Administrative Copy Email Address to User

Find the name of a firm attorney to highlight his/her name. 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 to which additional copies of eService Notification emails should be delivered.

Click **Save Changes**.

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

C. Add Additional eService Notification Email Recipients

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

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

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

To add multiple eService notification recipients:

Click **My Account** on the top navigation bar (Figure 12-4, A).

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

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

On the **eService Notification Copies** page (Figure 12-4) you will see all individuals (Figure 12-4, D), if any, already added to receive copies of eService Notification emails sent to you. Click the **Add eService Notification** (Figure 12-4, E) button to add a new recipient.

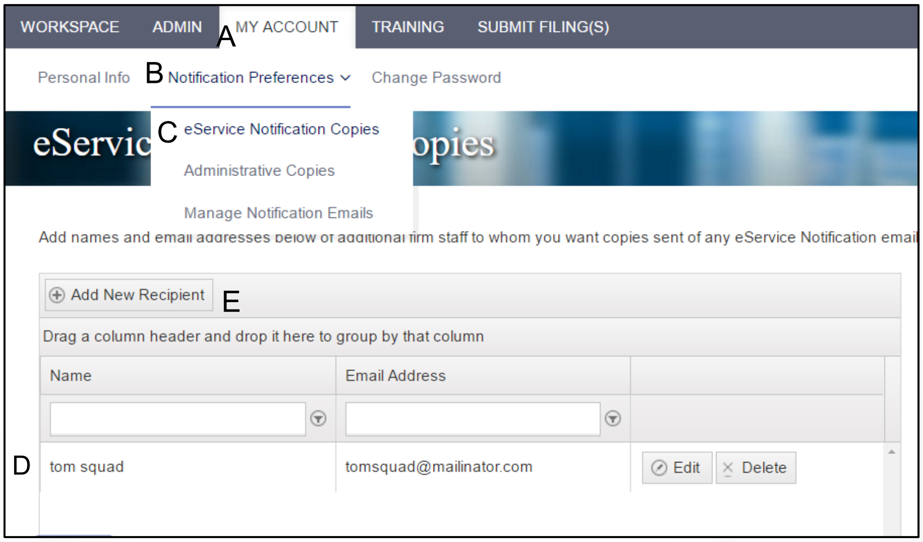

Figure 12-4, add multiple eService notification recipients

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

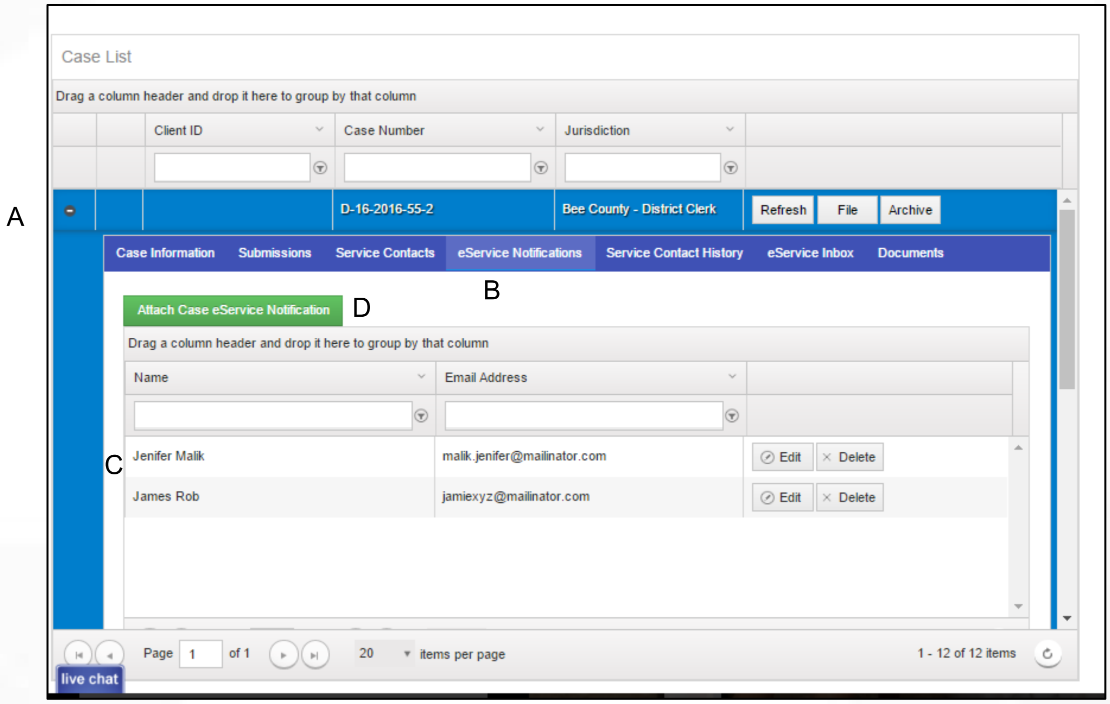

Figure 12-5, Case-Specific eService Notifications list.

From **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 12-5, A).

The case tabs open below the case.

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

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

Click the **Attach Case eService Notification** button (Figure 12-5, D) 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 eService emails for this case.

E. Select to Not Receive Specific Notification Emails

Individual users can opt out of receiving specific notification emails from eFileManager. Click **My Account** on the top navigation bar.

Click on **Notification Preferences**.

Click **Manage Notification Emails** from the drop-down menu. You are now on the Manage Notification Emails page.

There are two sections of this page.

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

1. **eFileManager Emails**
    - **Filing Accepted** - You receive this for every filings accepted by the clerk.
    - **Filing Submitted** - You receive this after each filing is received by eFileManager from you.
    - **Filing Returned for Correction** - You receive this when the clerk returns the filing for correction.
    - **Service Undeliverable** - This means that the eService cannot be delivered to the intended recipient.
    - **Filing Submission Failed** - You receive this when eFileManager fails the filing before it gets to the clerk.
2. **FileTime Notification Emails**
    - **Filing Submitted** - You receive this for each submission.
    - **Filing Accepted** - This comes to you after a filing is accepted and it provides billing information.
    - **Filing Failed** - You receive this when eFileManager fails a submission.
    - **Filing Returned for Correction** - You receive this email, which contains information about how to re-efile and preserve the original submission date when the clerk returns a filing for correction.
    - **Service Status** - This email updates you on the status of all the eService recipients after you eServe them.

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

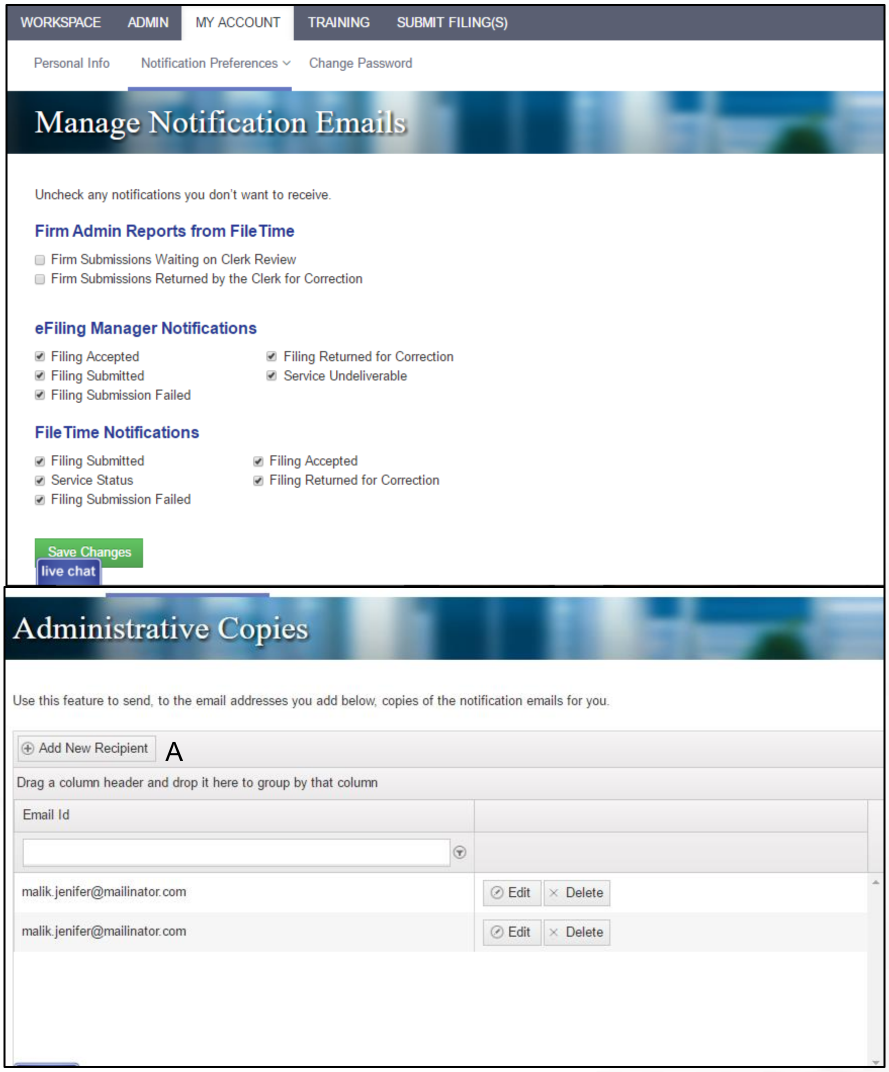

Figure 12-6, Opting Out of Notification Emails and Adding New Recipients

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

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

In the **Administrative Copies** section (Figure 12-6) you can now tell eFileManager and FileTime to send ALL of those Notification emails to as many email addresses as you wish.

Click the **Add New Recipient** button (Figure 12-6, A)

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 eFileManager 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 Inbox. This will prevent him or her from seeing them at all.

Read **Configuring Rules in Microsoft Outlook to automate message handling**

Chapter 13

XIII. Navigating and Customizing Your Views

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

A. Firm/Personal Filter

You will find a filter like the one below (Figure 13-1) on the Cases, Submissions and Filings pages. Most of your firm filters 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 to view actions firm-wide rather than just for yourself.

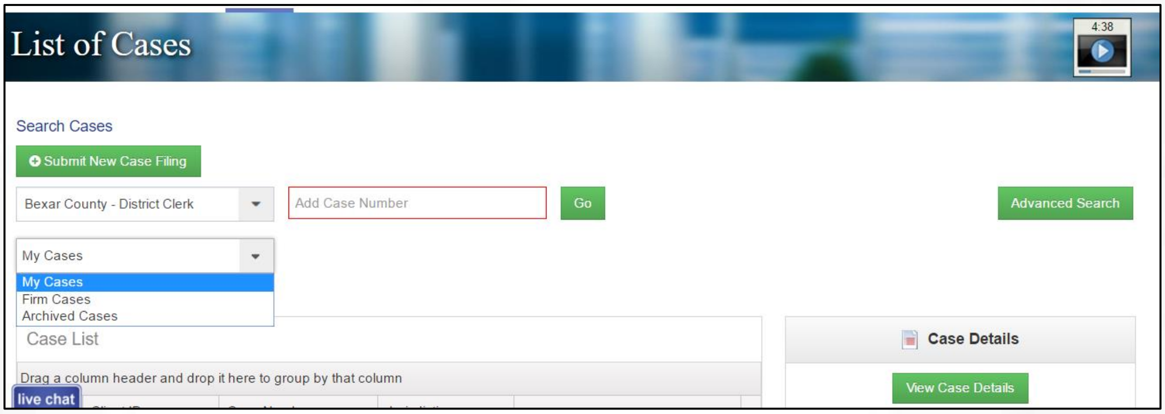

Figure 13-1, Firm/Personal Filter

B. Sorting Grid Columns

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

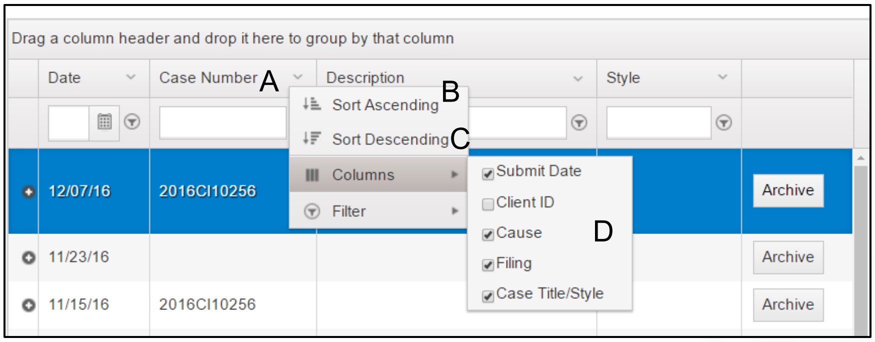

Figure 13-2, Grid Sorting and Display Options

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

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

C. Customizing Grid Columns

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

D. Searching in Grids

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

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

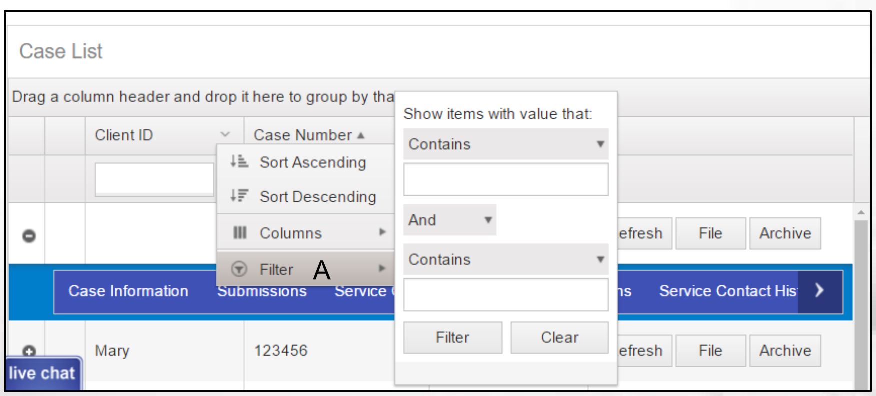

Figure 13-3, Searching the Column

1. **The Filter-type button provides you four options:**

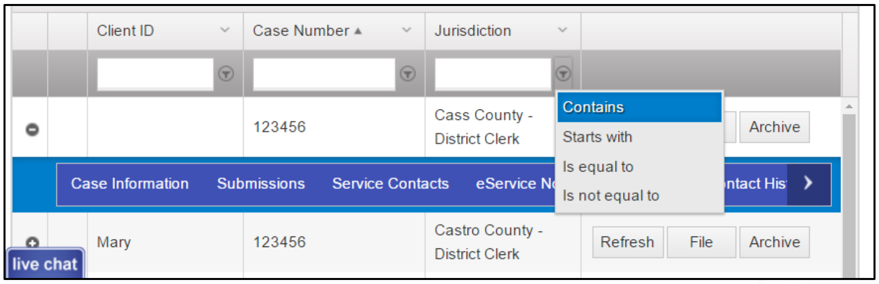

Figure 13-4, Filtering Options

- **Starts with** - Select this choice and you will filter for any records that start with the data you enter in.
- **Is not equal to** - Select this option leave all records displayed on the grid except those that are equal to the data you enter in**.**
- **Is equal to** - Select this option and only records that are exact matches to what you enter in will be displayed.
- **Contains** - 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.

2. **Enter your search criteria in the Filter Criteria field (Figure 13-3).**
   Depending on the Filter-type you selected in the previous step and the data column in which you are performing this search, you may need to enter the complete Case Style or just a few numbers of the matter number, as examples.
3. **Click the Filter or Clear button**
   Click the **Filter** button 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 to clear all the selections you made above and start over.

4. Grid Navigator

When you have many cases, submissions, filings, etc., they cannot all be displayed conveniently on one page.

The navigator at the bottom (Figure 13-6) of the grid provides ways to quickly view all the rows on the grid.

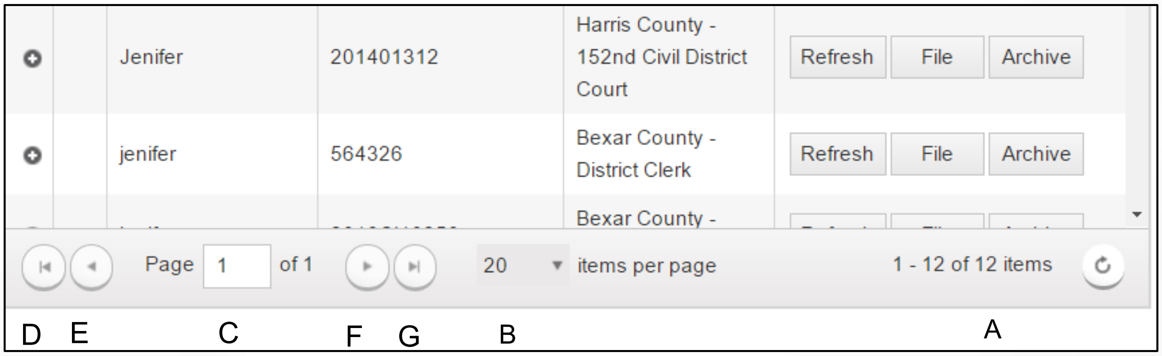

Figure 13-6, The Grid Navigator

- **Total Records** (Figure 13-6, A) - The records display shows which group out of the total number of records (cases, submissions, filings, etc. - depending on which grid) are available.
- **Items per Page** (Figure 13-6, B) - You have multiple selections concerning how many rows you want FileTime to display.
- **Page Displayed** (Figure 13-6, C) - This area shows you which page of the total pages available is displayed. The number of pages available will vary by the number of records available and the number of records you want FileTime to display.
- **Go to Beginning** (Figure 13-6, D) - Click this button and you are returned to the page containing the first record.
- **Go Back One Page** (Figure 13-6, E) - Click this button to go back one page.
- **Go Forward One Page** (Figure 13-6, F) - Click this button to go forward one page.
- **Go to End** (Figure 13-6, G) - Click this button to go to the last page

Chapter 14

XIV. Getting Assistance and Giving Feedback

We provide a number of training options for you.

A. Training

1. MCLE-Accredited eFiling Training

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

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

B. Video Training

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

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

C. Manuals

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

- **Administrator's Guide**- This is the bible for firm eFiling administrators..
- **eFiling Guide** - A detailed look at the FileTime eFiling process.
- **Searchable PDF Guide** - This guide explains what a searchable PDF is and how to create them

D. Contact Us

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

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

E. Knowledge Base

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

F. Feedback

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