eFileTexas.gov™

Court Administrator User Guide

Copyright and Confidentiality

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1 System Overview

Topics Covered in this Chapter

This system enables registered users to file documents with the court anytime, anywhere, 24 hours a day, seven days a week. This highly automated, scalable system provides customers the opportunity to transition from an inefficient paper-based process to a streamlined technology-based electronic filing (e-filing) system.

Release 3.7 New Features

Note: You must have Court Administrator privileges to use the features.

Digital Signatures

The digital signature feature allows a user to digitally sign a document using a stamp or an annotation.

The digital signature feature has been updated to keep the original signature valid when annotations or stamps are added to the document. Previously, a change in an annotation would have made the digital signature invalid.

Service Notifications for single or multiple digitally signed documents are no longer invalidated once digitally signed.

Multiple pages with the same annotations now receive one digital signature.

Auto-Accept Rules

Note: This feature must be configured by Tyler personnel.

The Auto-Accept feature gives the courts the ability to automatically accept certain filings (not envelopes) that do not require review.

Unlock Envelope

The Court Administrator can unlock filings that have been locked by other administrators so other reviewers can review the filings and perform the necessary actions.

Before You Begin

Before you begin, there are several items you should be aware of to assist you with the successful operation of your software.
Note: Depending on your setup, all features may not be available. As a result, your screen may vary from what is shown in the document.

System Requirements

This section describes the recommended system requirements to successfully use the system.

- **Browser Requirements** – The system supports current versions of the Windows operating system using Internet Explorer 7 or above or Firefox. If your browser does not meet these minimum requirements, please contact your network administrator.
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Minimum Screen Resolution** – For best results, a setting of 1024x768 or better is highly recommended. If necessary, users can set their monitors to 800x600 pixels, but doing so may compromise the graphic display.
- **Document Format** – PDF is the only format allowed for attaching documents when using the system.

Page Navigation

The following describes how to navigate eFileTexas.gov and populate data fields throughout the filing process.

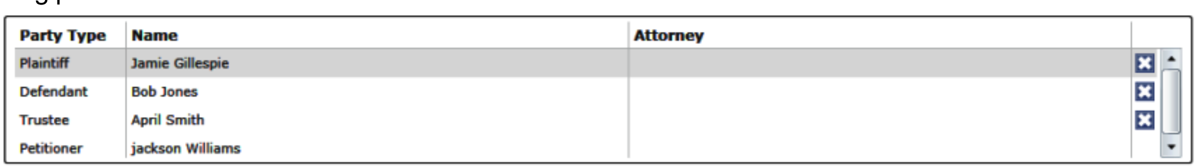
Navigate with Breadcrumbs

Breadcrumbs are a visual representation of the page you are currently on in the filing process. As you complete a page and move to the next page, the next page title illuminates to show you where you are in the process.
Note: Breadcrumb navigation requires information to be entered in a sequential order. You cannot move to the next breadcrumb until all of the required information on the current or previous page is completed.

Figure 1.1 – Breadcrumb Navigation

Populate the Data Table

The data table is populated using information entered or selected when completing the forms throughout the filing process.



Party Type	Name	Attorney
Plaintiff	Jamie Gillespie	
Defendant	Bob Jones	
Trustee	April Smith	
Petitioner	jackson Williams	

Figure 1.2 – Data Table

Enter User Information

The user information you enter or select populates the data table.

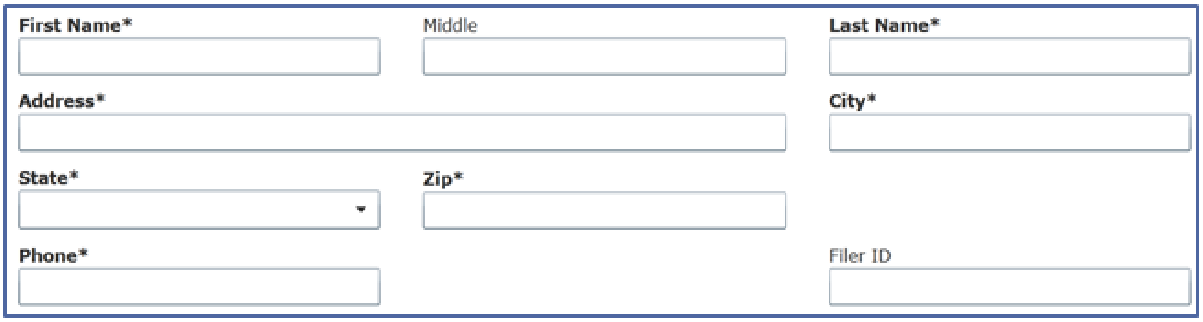


Figure 1.3 – Data Fields

Resume Filing

eFileTexas.gov automatically saves a draft of pages where you have completed all required fields. This feature allows you stop work on a filing and resume the filing at a later time. To resume filing of a saved draft, click WORKSPACE the link at the top of the page, find your case on the **Filings** screen, and click the icon to resume your filing.

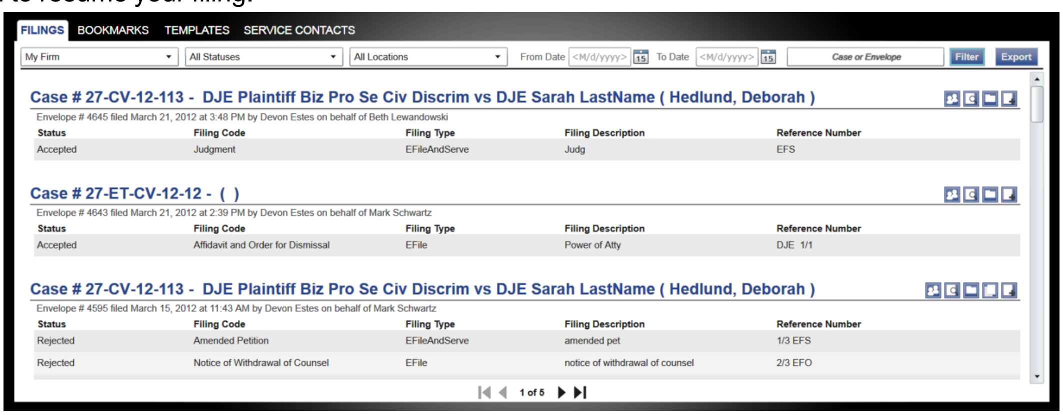


Figure 1.4 – eFileTexas.gov Workspace

Error Messages

eFileTexas.gov displays several error messages to alert users when required information is not entered or invalid information is provided.

Password Reset Error Scenarios

Invalid User – To reset the password for your account, you will need to provide the username for the account and answer the security question for the account. **Note: That user does not exist.**

No Security question on File – No security question on file for (username). Your firm administrator may still reset your password. **Note: Reset your password.**

Enter Data in Required Fields

Required fields are those that contain an asterisk (*) next to the field name. If you don't enter the information required into a required field and try to advance, you will receive error messages.
Note: Required fields may vary in different sections.

Look for a field outlined in red in your form. Place the cursor on the outline of the field, and a required field message displays.

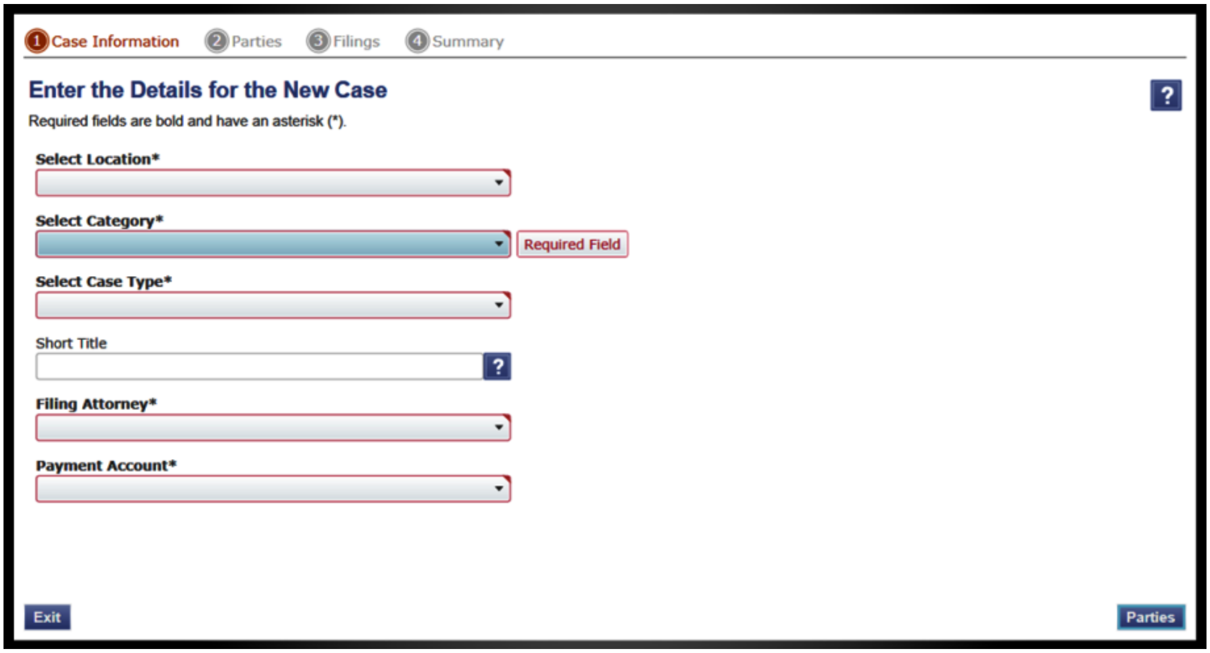


Figure 1.5 – Required Field Error Message

Receive Error Messages

When eFileTexas.gov displays an invalid error message, this means a required field must be populated to continue.

If the screen does not change when a navigation button is selected, look for a field outlined in red in your form. Place the cursor on the outline of the field, and an error message displays.

Figure 1.6 – Invalid Entry Error Message

2 Home Page

The home page serves as the gateway to the system. From this screen, you can register, log in, read your court's **Message of the Day**, access the user guides, view training sessions, and get contact information for Technical Support.

Figure 2.1 – Home Page

Message of the Day

The **Message of the Day** provides important messages from the court. Check this section daily for important messages from the court.

Login

The **Login** area allows the user to log in and use the system. Users can log in to by entering their e-mail address and password.

Register Now

The *Register Now* link allows is a user to register in the system using their name, contact, and payment information. The system requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

Forgot Password

The *Forgot Password* link allows a user to request their password information be re-sent to them in cases where they have forgotten their password.

Keep Me Logged In

The *Keep me logged in* checkbox allows a user to remain logged into the system for future access.

Learn

The **Learn** section has links to the user documentation. The following types of documents available to help you answer many of your day-to-day operation questions:

- The **User Guide** provides step-by-step instructions on using the system. The user guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and password.
- The **Firm Administrator Guide** is specifically for the Firm Administrator. This guides covers administrative functions such as registering the firm; managing user, payment, and attorney accounts; and creating and editing the firm's contact lists.
- The **Quick Reference Guide** (QRG) provides only the steps needed to complete common tasks such as logging in to the system, searching for a case, initiating a new case, filing into an existing case, and reviewing the filing status.
- The **Frequently Asked Questions** (FAQ) guide lists the most frequently asked questions from the users. The FAQ covers questions pertaining to functionality.

Train

Free regularly scheduled online training is available. You can register for training online and download user manuals.

- The **Web Conference Training Sessions** are scheduled according to the needs of the courts. Locate your specific court by scrolling through the list of training sessions for your court.
- **Self-study Online Training** is available by clicking on the link and choosing the topic of your choice.

Support

The Technical Support Team is available to assist all users by calling 855.839.3453 Monday through Friday between the hours of 7 a .m. to 9 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an e-mail to support@efiletexas.gov or by using the Chat option.

3 Login and Logout

Topics Covered in this Chapter

♦ Logging in
♦ Logging Out
♦ Resetting your Password

All users are required to log in to e-file and serve a document or to check the status of an existing filing. It is also a best practice for users to log out after they have completed their transactions.

Logging in

You can log in by using your e-mail address and password provided during the registration process. You must log in to be able to e-file or e-serve.

Note: Click Register Now to register if you have not registered before.

Perform the following steps to log in:

1. Go to your home page.
2. Enter your e-mail address and password (case-sensitive) in the fields provided.

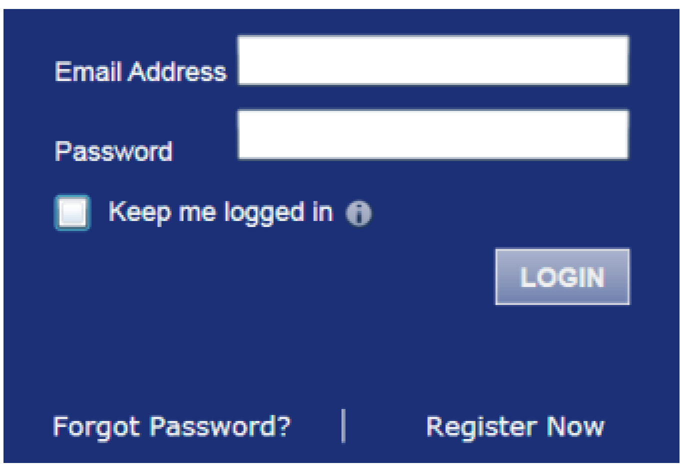


Figure 3.1 – Login Area

3. Select the Keep me logged in check box to stay logged in. This keeps you logged in until you click the logout link to logout.
4. Click the LOGIN button.

   Note: After several failed attempts to log in to the system, your account is locked. You can unlock your account by using the Forgot Password? option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.

   Once you have successfully logged in, you can begin to e-file and e-serve.

Logging Out

This section describes how to properly log out.

Perform the following steps to log out:

1. Click the LOGOUT link at the top right corner of the page to automatically log out.

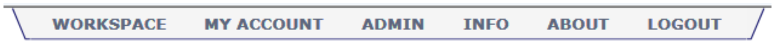


Figure 3.2 – Logout Link

2. Return to the home page to log in to the system.

Resetting your Password

If you have forgotten your password, you can reset your password by entering the e-mail address provided during registration and clicking the Forgot Password? link.

Note: Your password is case-sensitive. Make sure your caps lock is not on.

Note: You can unlock your account by using the Forgot Password? option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.

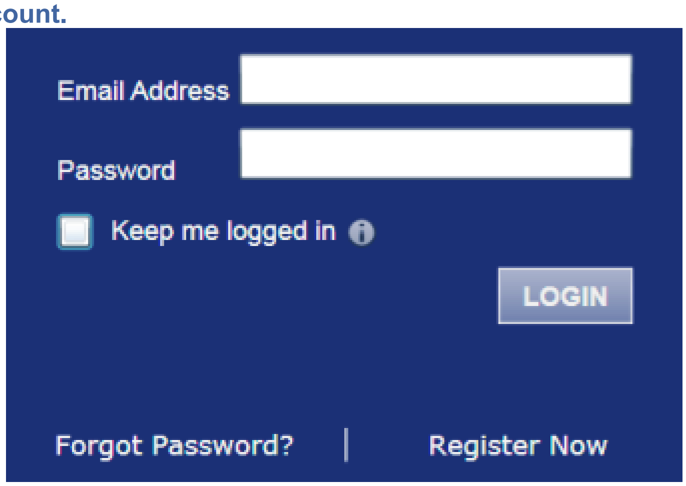


Figure 3.3 – Login Window

1. Click the Forgot Password? link on the **Login** window.

   The **Reset Password** window opens.

Figure 3.4 – Reset Password – E-mail Address

2. Type the e-mail address you provided during the registration process in the **E-mail Address** field.

   Note: An error message stating No user is registered with that email address displays if the system cannot is unable to find your email address.

3. Click the Next button to continue.

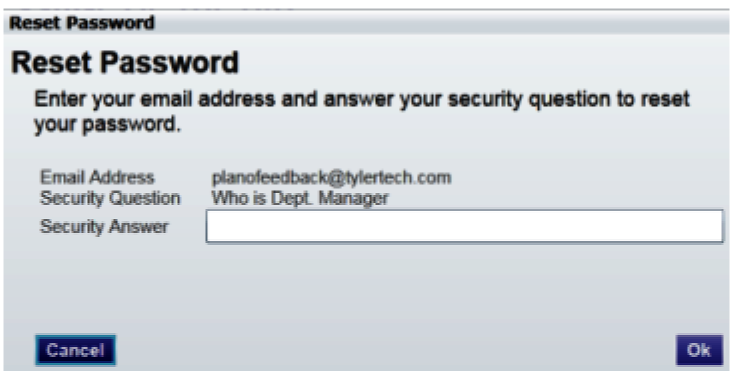


Figure 3.5 – Reset Password – Security Answer

4. Type your answer in the **Security Answer** field.
5. Click the Ok button, or click the Cancel button to cancel the reset password process.

   The system displays this message: **A password reset link has been sent to the email address associated with your account. If you do not see the password reset email in your Inbox, please check to see if it was delivered to your spam folder.**
6. Go to your email inbox.
7. Locate the email from no-reply@eFileTexas.gov.
8. Click the link labeled **Click here** to reset your password.

   You will be prompted to choose a new password.
9. Enter a new password in the *New Password* field.
10. Re-enter your new password in the *Repeat New Password* field.
11. Click the *Change Password* button.

    A confirmation screen displays: **Your password has been changed successfully.**

4 Case Search

Topics Covered in this Chapter

♦ Advanced Search

Search for a case by selecting a location, entering a case number or a party name.

Advanced Search

The **Advanced Search** feature provides the ability to search by party name using a person or a business name. The **Advanced Search** feature includes the ability to filter a search by party name based on the location or the case type.

Performing an Advanced Search by Person

An asterisk (*) indicates a required field. **Note: Color themes may vary by site.**

Complete the following steps to perform an **Advanced Search** using the **Person** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

   The *Advanced Search* dialog box opens.

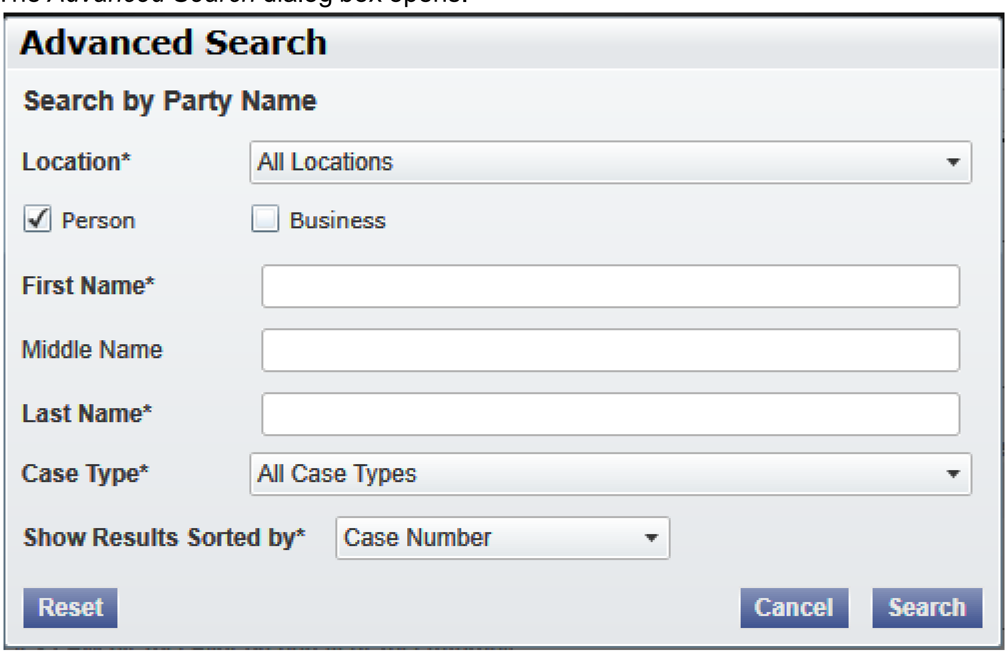


Figure 4.1 – Advanced Search Dialog Box

2. Select the **Person** check box.

   Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.

4. Click the **Search** button to continue or the **Cancel** button to cancel. Click the **Reset** button to reset the form.

The search results are displayed.

Performing an Advanced Search by Business

An asterisk (*) indicates a required field. **Note: Color themes may vary by site.**

Complete the following steps to perform an *Advanced Search* using the **Business** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

   The *Advanced Search* dialog box opens.

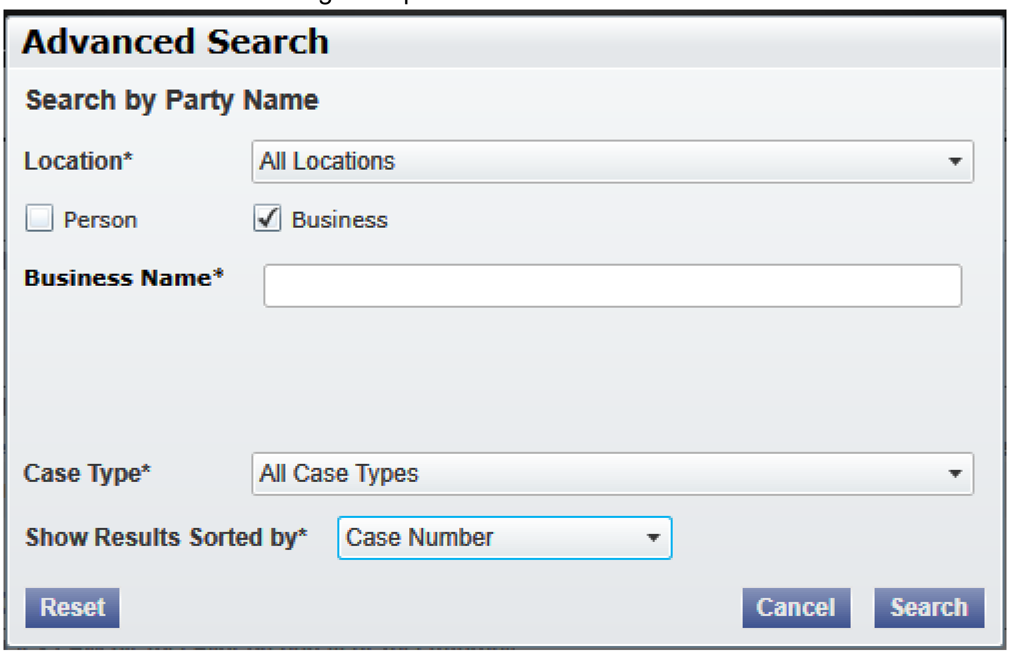


Figure 4.2 – Advanced Search Dialog Box

2. Select the **Business** check box.

   Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.
4. Click the **Search** button to continue, or the **Cancel** button to cancel. Click the **Reset** button to reset the form.

The search results are displayed.

5 Court Administration

Topics Covered in this Chapter

♦ Approving and Rejecting New Users

The **Court Administration** section allows the Court Administrator to approve or reject new users, manage court users, and modify user accounts.

Approving and Rejecting New Users

The Court Administrator approves or rejects new users for the firm. When a user registers for the system, the Firm Administrator receives notification a user has registered and has requested to be added to the firm.

Perform the following steps to accept or reject new users:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Approve New Users** tab.

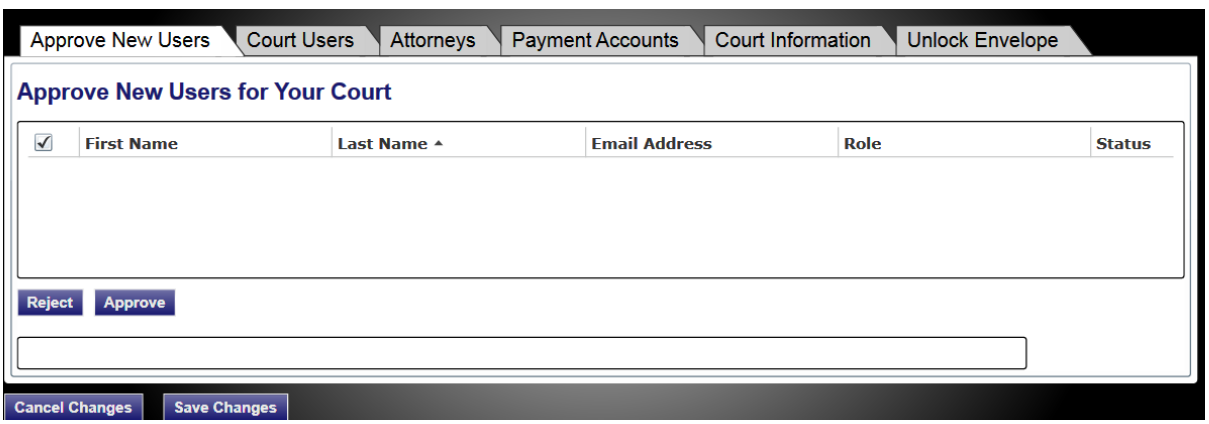


Figure 5.1 – Approve New Users Tab

3. Select the user from the list to approve or reject.
4. Click the Approve button to approve the new user, or click the Reject button to reject the new user.
5. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

6 Manage Court User Accounts

Topics Covered in this Chapter

The Court Administrator is responsible for registering and approving new users, adding user accounts, resetting passwords, and activating and deactivating user accounts for the courts.

Adding Court User Accounts

A Court Administrator can add court user accounts.

Note: An asterisk (*) indicates a required field.

Perform the following steps to add a new user account:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.

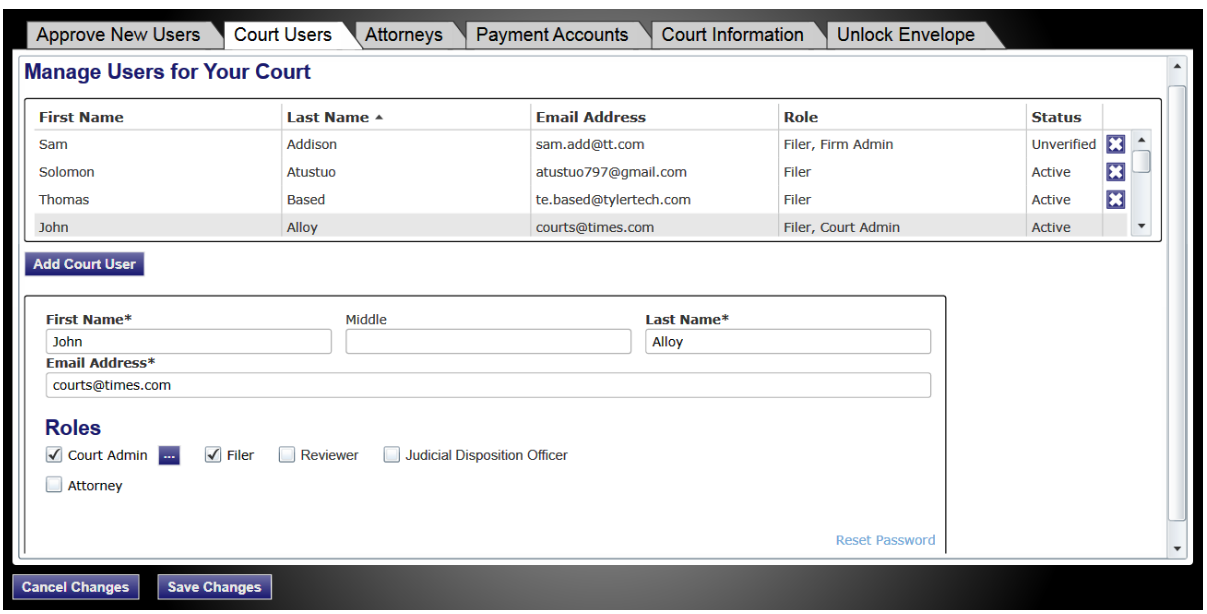


Figure 6.1 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Click the Add Court User button.
4. Complete the **Add Court User** form.
5. Assign a new court user role.

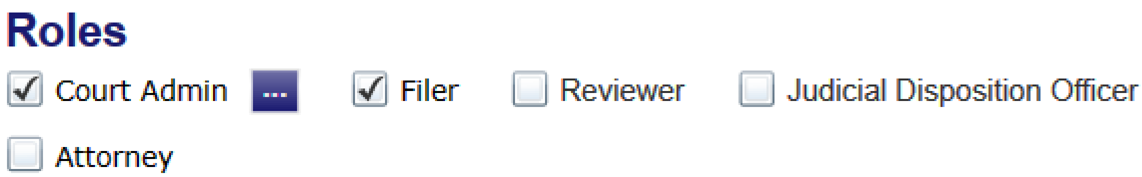


Figure 6.2 – Court User Roles

a. Select the Court Admin check box to assign the Court Administrator role to the new user.

b. Select Filer check box to assign the Filer role to the new court user.

c. Select the Reviewer check box to assign the Reviewer role to the new user.

d. Select the Judicial Disposition Officer check box to assign the Judicial Disposition Officer role to the new user.

e. Select the Attorney check box to assign the Attorney role to the new user.

6. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

The new user information is displayed at the top of the screen.

Editing Court User Accounts

The Court Administrator can edit court user accounts.

Perform the following steps to edit the court user account information:

1. Select the **Court Admin** link on the top menu.

   The **Court Administrator** function screen opens.

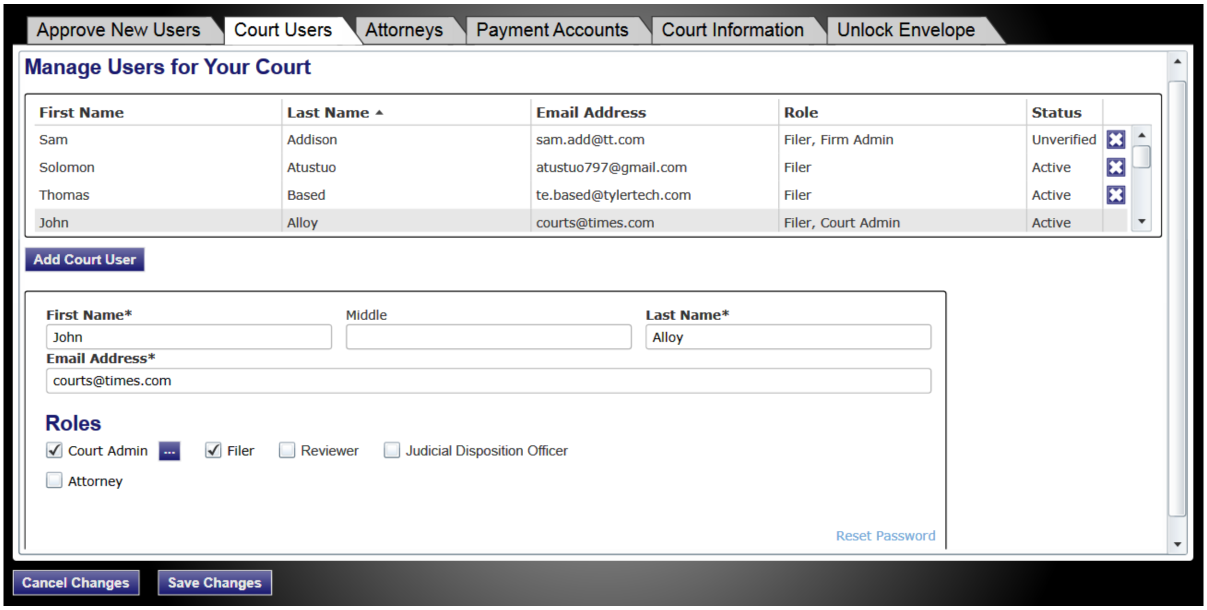


Figure 6.3 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Select the court user you want to edit from the list.
4. Edit the information in the form.
5. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

Deleting Court User Accounts

The Court Administrator can delete user accounts.

Perform the following steps to delete a court user account:

1. Select the COURT ADMIN link on the top menu.

   The **Court Administrator** function screen opens.

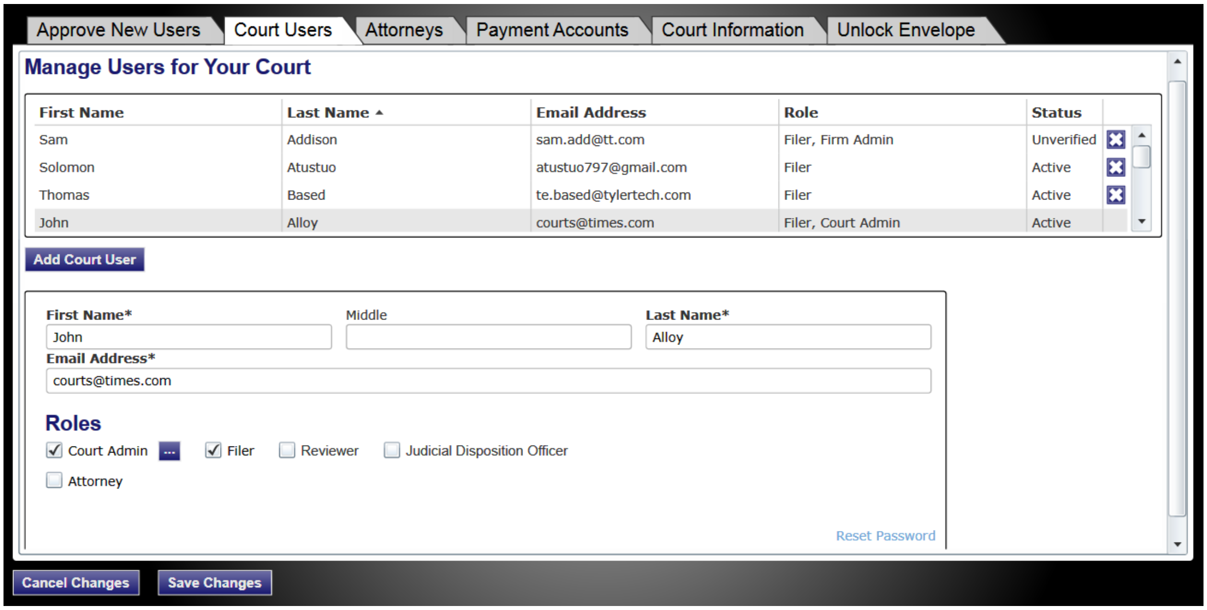


Figure 6.4 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Select the court user to delete on the list.
4. Click the button to delete the user from the list.
5. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

7 Manage Court Attorney Accounts

Topics Covered in this Chapter

♦ Adding Court Attorney Accounts
♦ Editing Court Attorney Accounts
♦ Deleting Court Attorney Accounts

The Court Administrator is responsible for managing attorney accounts for the courts.

Adding Court Attorney Accounts

The Court Administrator can add attorneys to the court's user accounts or the attorney list. Perform the following steps to add an attorney to the attorney list:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Attorneys** tab.

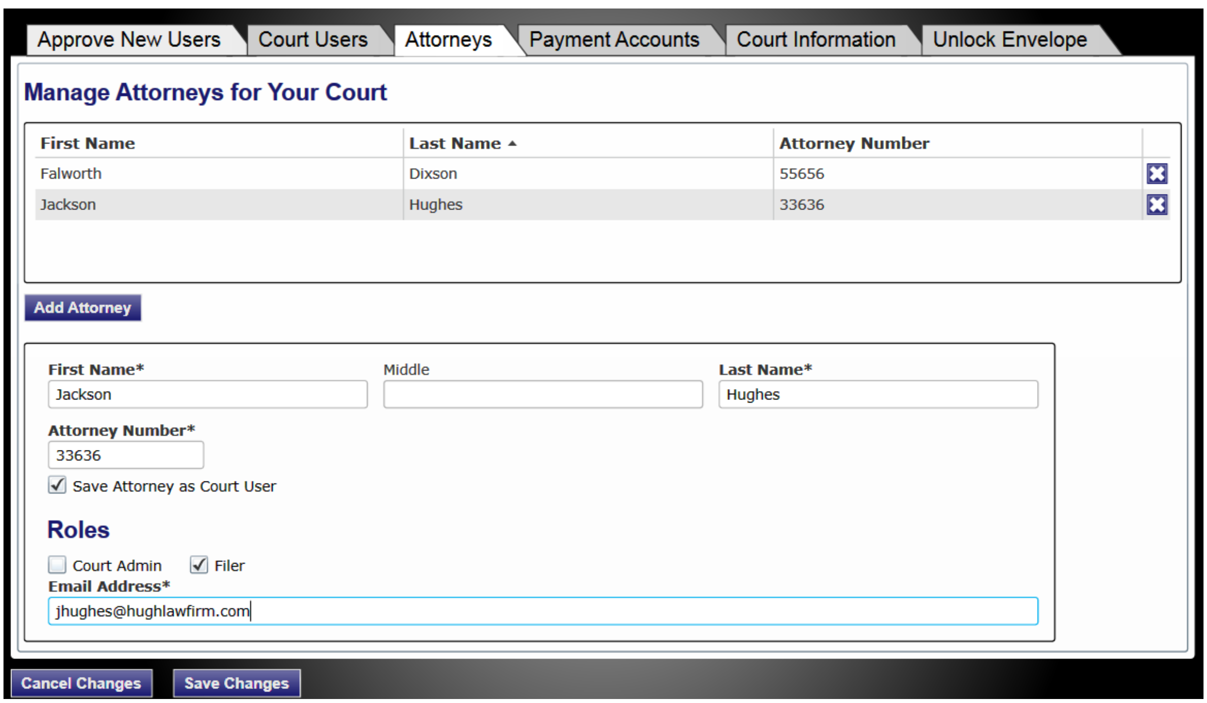


Figure 7.1 – Manage Court Attorneys Screen

3. Click the Add Attorney button.

   Note: An asterisk (*) indicates a required field.
4. Enter the attorney's first and last name in the fields provided.
5. Enter the attorney number in the **Attorney Number** field.

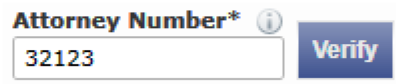


Figure 7.2 – Attorney Number Field

6. Click the Verify button to verify the attorney number is correct and registered with the court.

   The **Verify Attorney Information** window opens and loads the attorney information registered with the court.

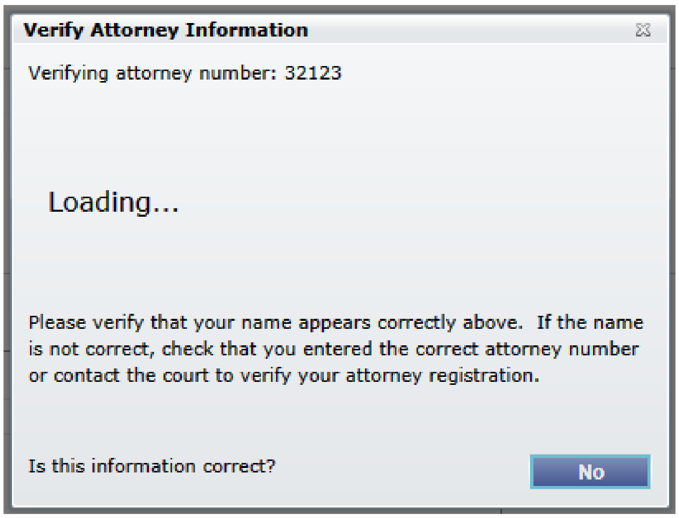


Figure 7.3 – Verify Attorney Information Window

Note: If the attorney information is incorrect, select the No button to correct the information. This takes you back to the Attorney tab.

7. Select the Save Attorney as Court User check box to save the attorney as a court user (optional).
8. Assign the court attorney roles.

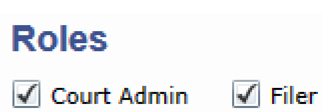


Figure 7.4 – Court User Roles

   a. Select Court Admin to assign the Court Administrator role to the new attorney.

   b. Select Filer to assign the Filer role to the new attorney.
9. Type the attorney's e-mail address.

Figure 7.5 – E-mail Address Field

10. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Editing Court Attorney Accounts

The Court Administrator can edit the attorney's information using the **Attorneys** screen.

Perform the following steps to edit the information entered for each attorney:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Attorneys** tab.

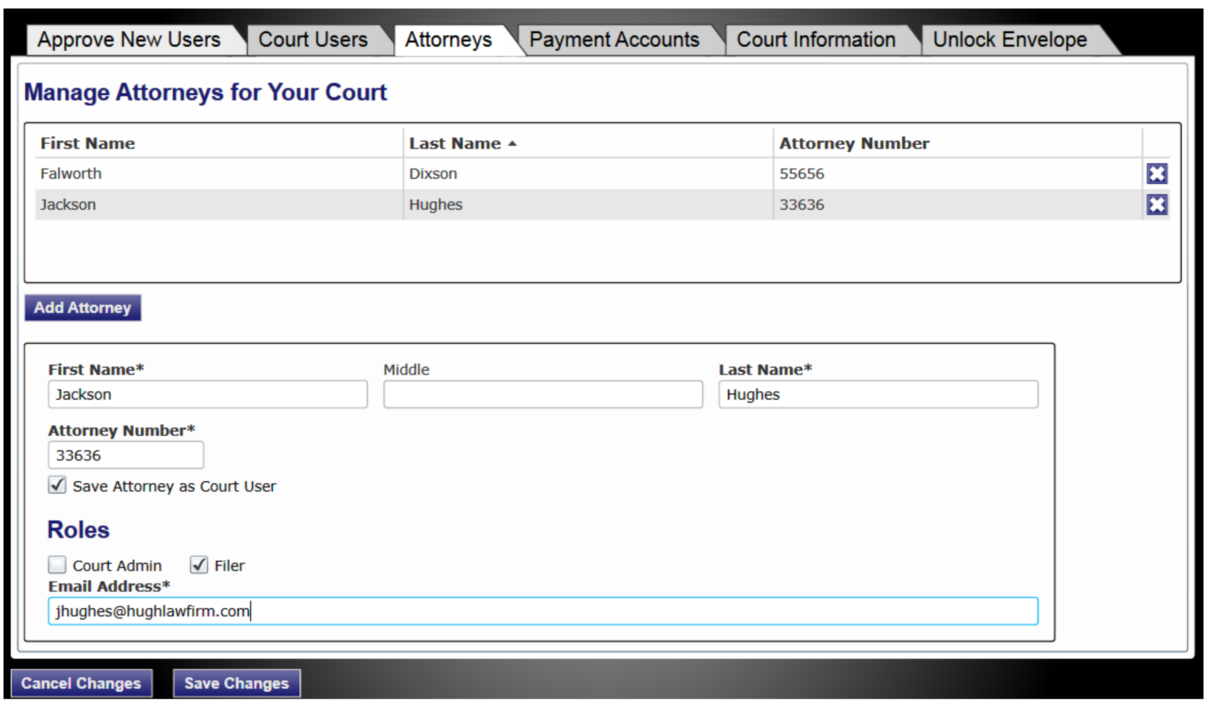


Figure 7.6 – Manage Court Attorneys Screen

3. Select the attorney you want to edit from the list.
4. Edit the information in the form.

   Note: An asterisk (*) indicates a required field.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Deleting Court Attorney Accounts

The Court Administrator can delete an attorney's account using the **Attorneys** screen.
Perform the following steps to delete an attorney account:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Attorneys** tab.

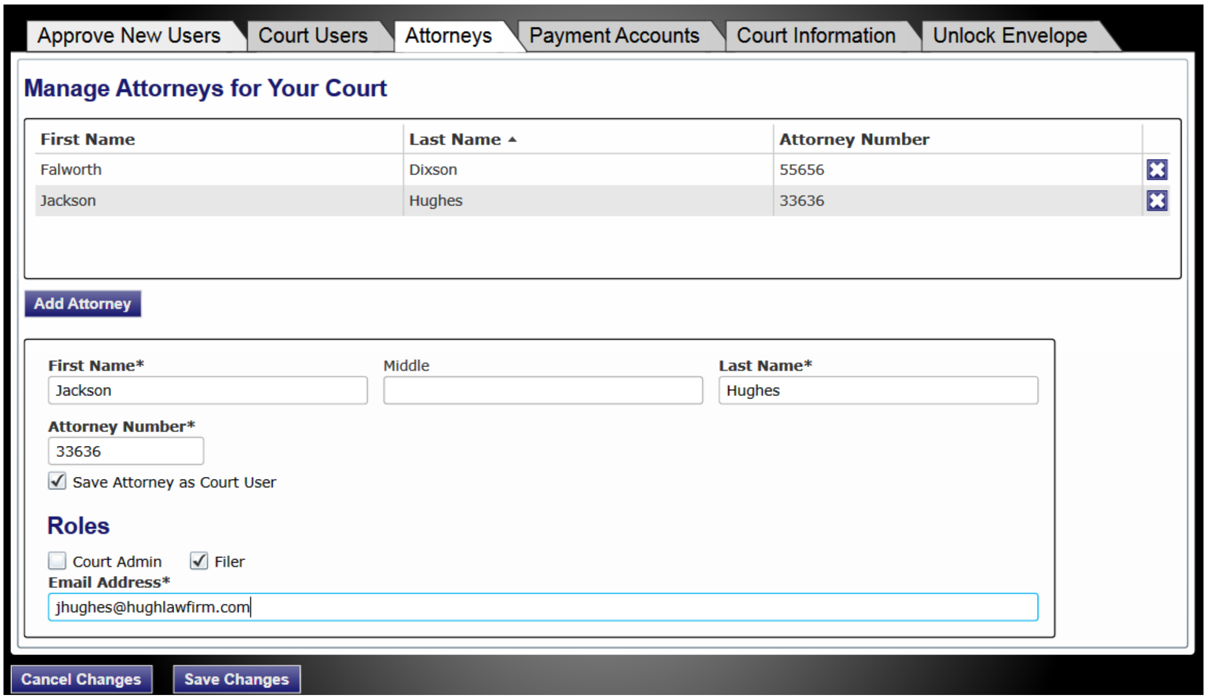


Figure 7.7 – Manage Court Attorneys Screen

3. Select the attorney you want to delete from the list.
4. Click the button next to the attorney's name to delete the attorney from the list.
5. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

8 Manage Court Payment Accounts

Topics Covered in this Chapter

The Court Administrator is responsible for managing payment accounts for vendor and statutory filing fees. Courts can have multiple payment accounts if needed. Credit cards and waivers are both valid forms of payment for vendor and statutory fees.

Adding Court Payment Accounts

All courts are required to have a payment account in order to file electronically. The Court Administrator adds payment accounts for the courts.

Perform the following steps to add a payment account for your court:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Payment Accounts** tab.

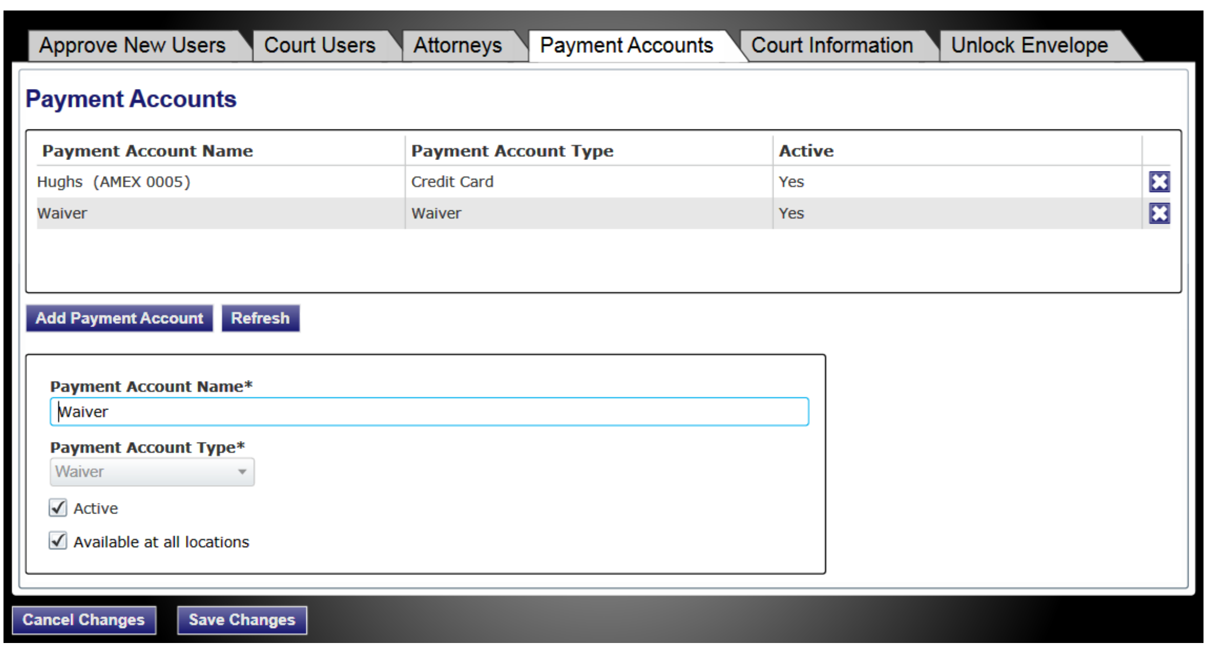


Figure 8.1 – Payment Accounts Tab Selected

3. Click the **Add Payment Account** button.
4. Complete the **Add Payment Account** form.

   a. Type a payment account name.

b. Select a payment account type (credit card, draw down, or waiver) using the drop-down list.

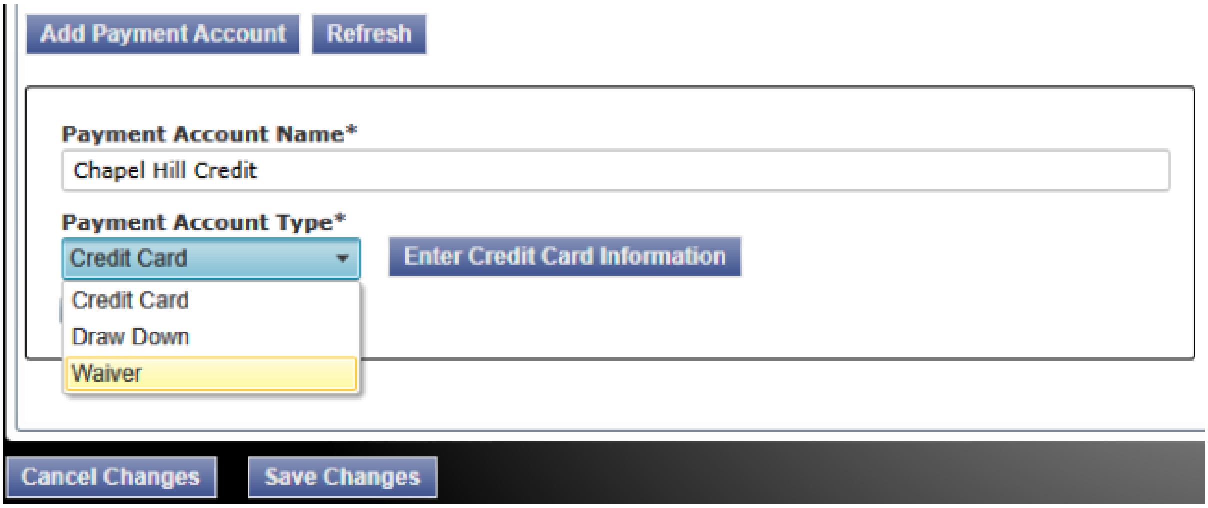


Figure 8.2 – Payment Account Drop-Down List

c. Select **Credit Card** if the payment account is a credit card.

d. Click the **Enter Credit Card Information** button to enter your credit card information.

Note: You are re-directed to a secure payment processing site to enter your credit card information.

e. Select **Draw Down** if the payment account is a draw-down account.

f. Click the **Enter Draw Down Information** button to select a draw-down account.

The **Draw Down** selection window opens.

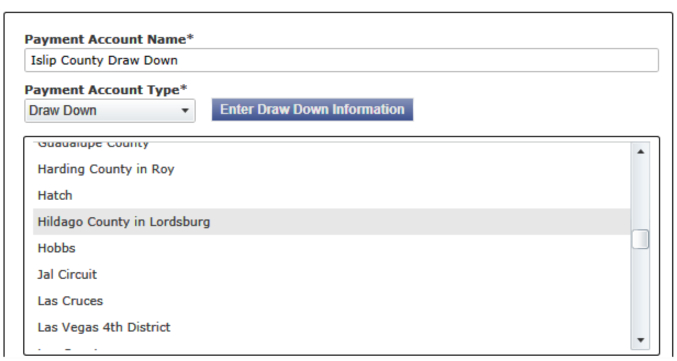


Figure 8.3 – Draw Down Selection Window

g. Select a draw-down account using the drop down list.

h. Select **Waiver** if the payment account is a waiver.

5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel** button to cancel any changes made.

The payment account information is displayed at the top of the screen.

Editing Court Payment Accounts

After a payment account has been entered, only the payment account name and the payment account type can be changed. You cannot edit credit card information after it has been entered. Instead, delete the payment account, and add a new one.

Perform the following steps to edit a payment account for your court:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Payment Accounts** tab.

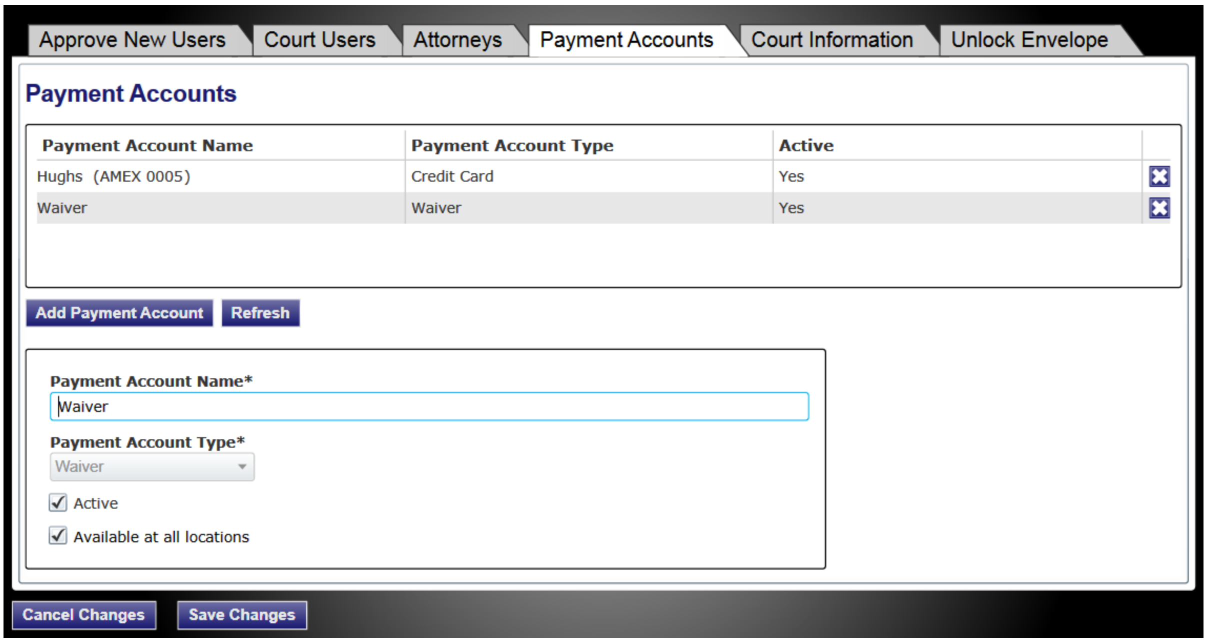


Figure 8.4 – Payment Accounts Tab Selected

3. Select the court payment account you want to edit from the list.
4. Edit the payment account name or type in the form.
5. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

Deleting Court Payment Accounts

The Court Administrator is responsible for deleting payments accounts.

Perform the following steps to delete a payment account for your court:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Payment Accounts** tab.

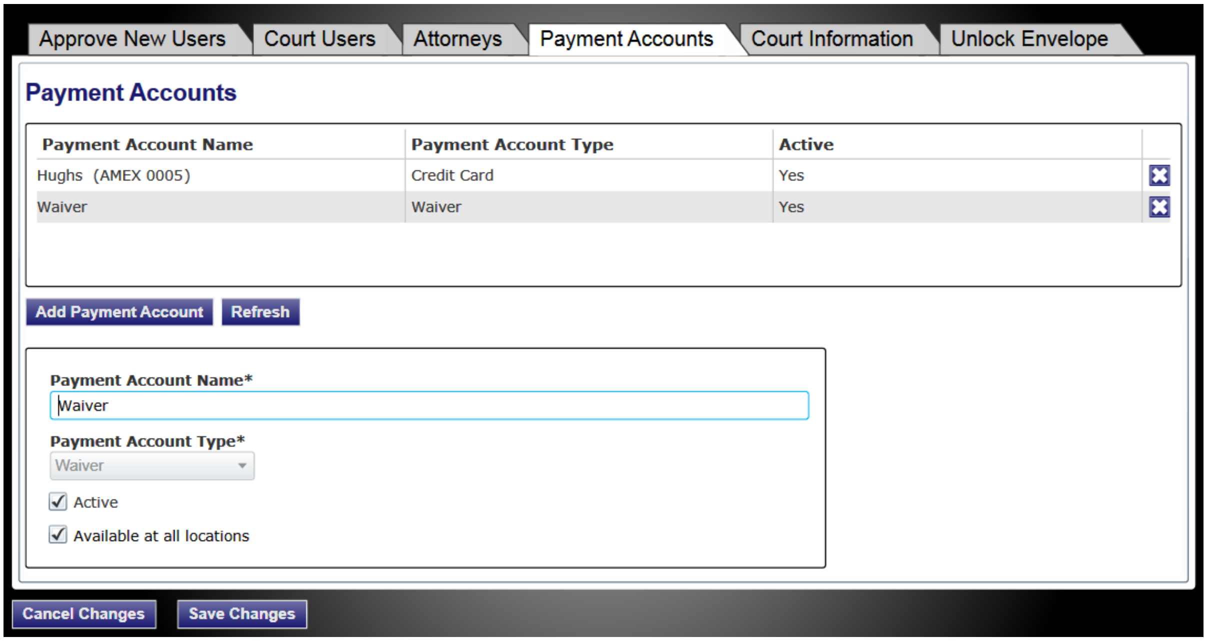


Figure 8.5 – Payment Accounts Tab Selected

3. Select the firm payment account to delete from the list.
4. Click the button next to the name in the list to delete the payment account..
5. Click the Save Changes button to save the changes and continue, or click the Cancel button to cancel any changes made.

   The payment account information is deleted in the table at the top of the screen.

9 Manage Court Information

Topics Covered in this Chapter

♦ Updating Court Information

The Court Administrator uses the **Court Information** tab to update the contact information for the courts (name, address, phone number). The Court Administrator can also use the **Court Information** tab to manage the registration process by maintaining the authority to register new users or allowing users to self register.

Updating Court Information

Use the **Court Information** form to update your court's contact information, change how a new user registers to use the system, allow the users to self-register, or change the approval process.

Perform the following steps to update court information:

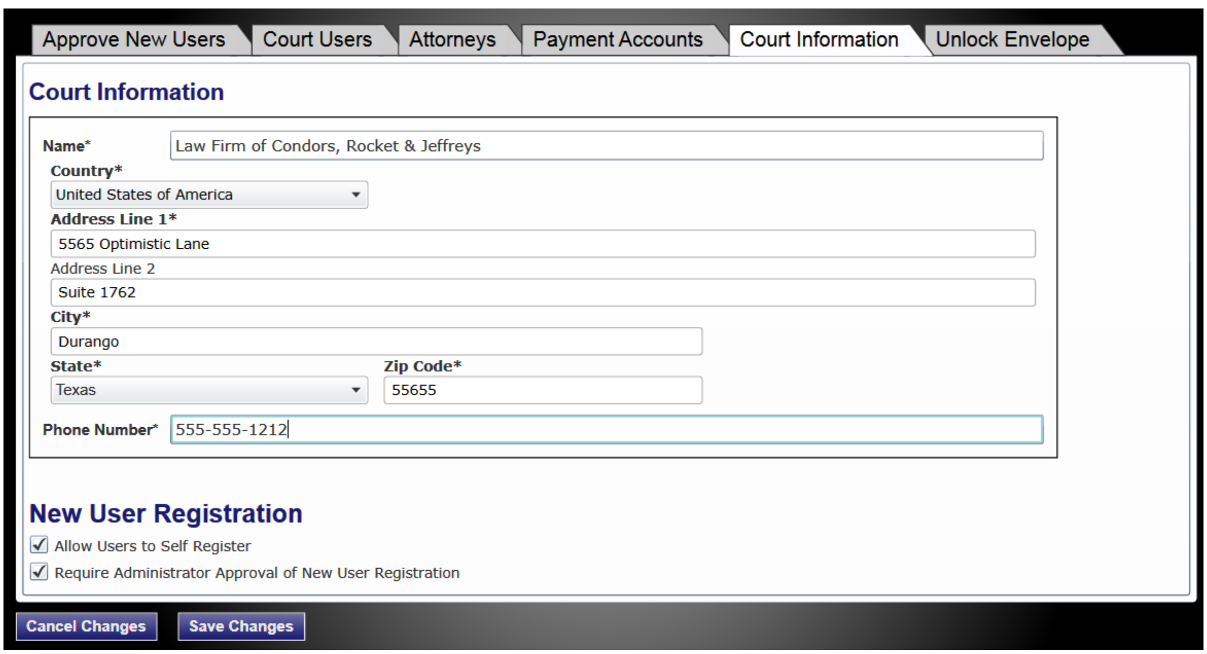


Figure 9.1 – Court User Information Screen

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Court Information** tab.

   The **Court Information** window opens.
3. Update the **Court Information** form as needed.
4. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made. The information entered here updates the court's information on the **Court Information** screen.

10 Unlocking an Envelope

When a reviewer opens an envelope in the Review Tool, that envelope becomes locked, preventing another reviewer from opening the same envelop and causing data integrity issues. However, there are times when a Court Administrator may need to unlock an envelope from one reviewer so that it can be worked by another. For example, when a reviewer opens an envelope and forgets to close it before going home. The Unlock Envelope feature gives the Court Administrator the ability to unlock an envelope that is locked by the original reviewer so that it can be worked by another reviewer.

Note: You must have Court Administrator privileges to use this feature.

Perform the following steps to unlock an envelope:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.

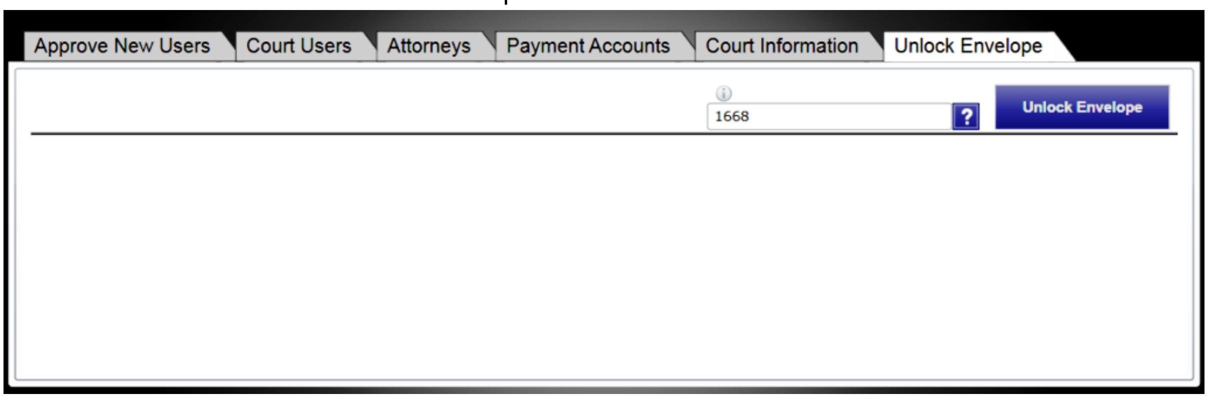


Figure 10.1 – Unlock Envelope Tab

2. Select the *Unlock Envelope* tab.
3. Type an envelope number in the blank field.
4. Click the Unlock Envelope button.

   The system performs an error check to ensure the envelope is locked and returns one of the following messages:

   - **Envelope Unlocked**: Envelope successfully unlocked.
     Note: Once the envelope is unlocked, refresh the queue to work the envelope. The original reviewer (who initiated the lock) will get an error indicating that they no longer have control of that envelope.
   - **Locked by Current User**: Envelope is currently locked by the currently logged in user. Please use the Review Tool to unlock. Simply access the envelope in the Review Tool and click the End Review/Stop button.
   - **Not Locked**: Envelope is not locked. Cannot unlock envelope which is not locked.

5. Click *OK* to continue.