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ImageSoft Training *Institute*
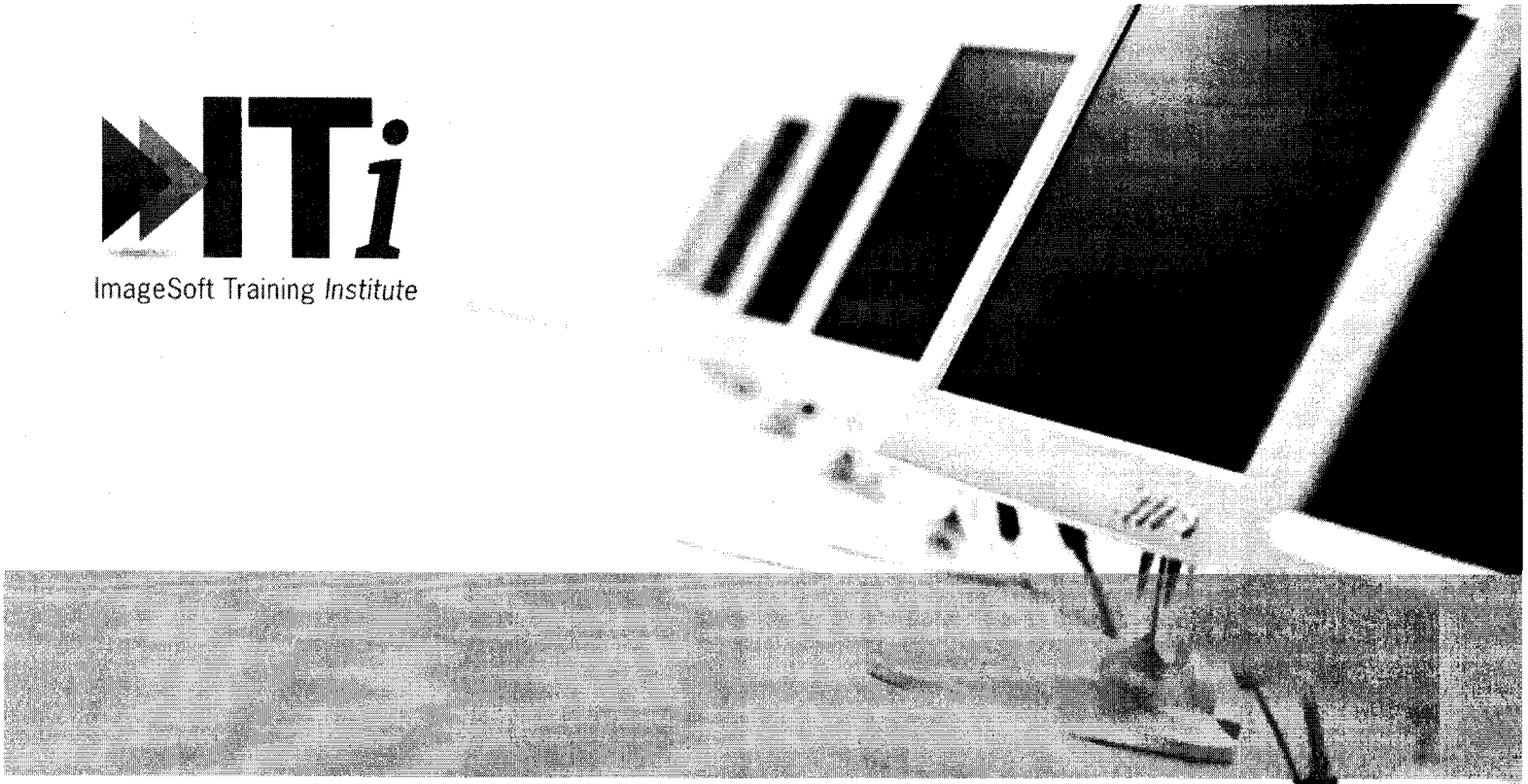
TrueFiling
User Guide

Version 1.0

Copyright

Table of Contents

About TrueFiling Manual

TrueFiling is an eFiling application developed by ImageSoft.

User Guide Structure

This manual has been designed as supporting material to be used as a guide to help you on the job and as a convenient reference for TrueFiling features. This manual provides you with detailed, step-by-step instructions that explain general navigation and processing in the TrueFiling application.

Related Documentation

This section is under construction. Check back at a later date.

Objectives

Upon reading this user guide, you will be able to:

✓ To provide an introduction to the features of the TrueFiling application.

✓ To search and retrieve cases in TrueFiling using the various search features.

✓ To add attorneys, contacts, and service recipients.

✓ To navigate within cases.

✓ To file and submit a file.

Introduction to TrueFiling

The Introduction to TrueFiling section provides you with the necessary knowledge that introduces you to eFiling court documents, the benefits to your organization, how to log into the application and TrueFiling navigation.

What is TrueFiling?

TrueFiling is a Web-based eFile and service solution for court, law firm and pro per filers. It expedites justice by reducing paper handling and travel time and improves the court's internal processes through electronic workflow. The solution supports all case types for Circuit, District and Probate courts and integrates with the court's Case Management System (CMS) and Enterprise Content Management (ECM) system to create a true Paper-on-Demand court environment.

First-time users or firms follow a simple registration process, providing contact information, email address and a secure password. After logging in, the user selects from a list of participating courts and then elects one of three options:

- Submit a case-initiating document

- File into an existing case

- Serve parties without filing

Logging on to TrueFiling

To access cases or file documents, you must first log on to TrueFiling.

1. From Internet Explorer, enter URL: www.truefiling.com.

2. From the logon Web site, in the **Username** text box, type your user name.

3. In the **Password** text box, type your password.

4. Click `Login`. The Web interface displays.

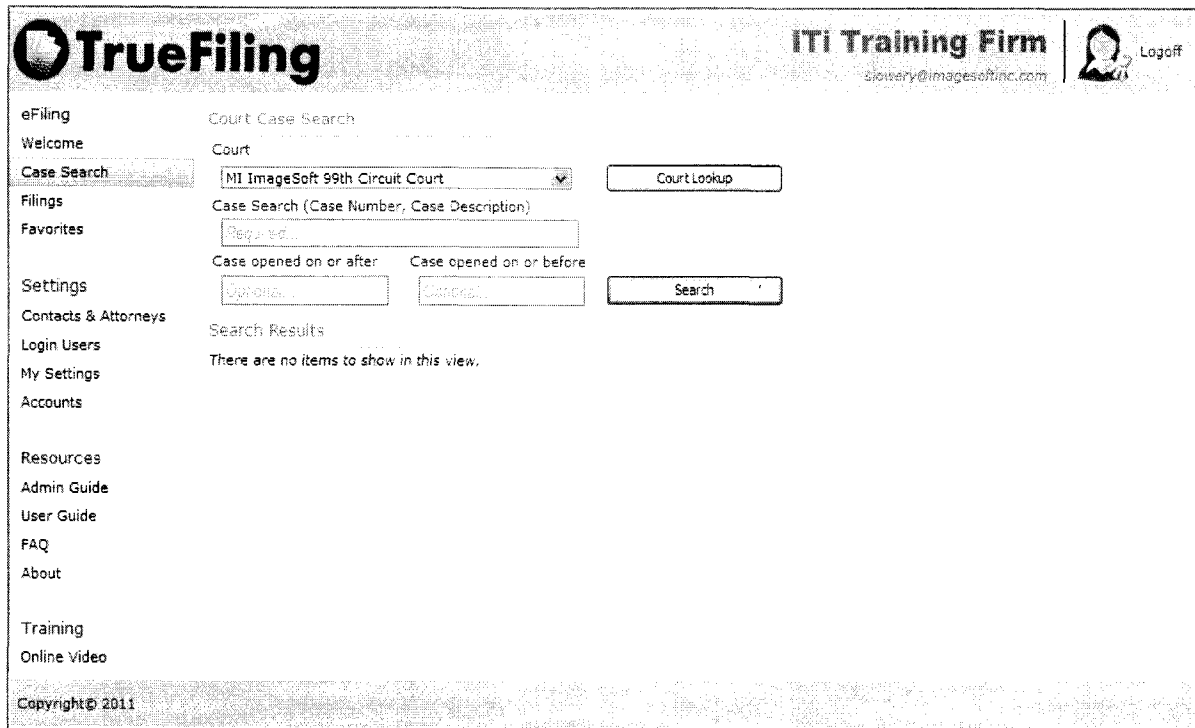**Note:** Username and Password are all case sensitive. If you forget your Username or Password, contact your Administrator to reset your password. When you are finished working, you can log out by clicking **Logoff** in the upper right-hand corner of the screen.

TrueFiling Main Screen

The TrueFiling program opens with the navigation menu displayed to the left of the screen, allowing you to access cases and file documents. Point-and-click functionality in the navigation menu provides the ability to rapidly switch from one section to another. These sections dynamically change as you select and perform various functions. The navigation menu's default position is the left side of the screen. Depending on configuration, your system will default to the *Court Case Search* page.

The following table describes the Main Menu and Sub-Menu options:
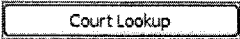
Main Menu Options	Sub-Menu Options	Description
eFiling	Welcome	The **Welcome** option contains your recent activity, such as filings, submissions, and adding of service recipients including the date and time of the activity.
	Case Search	The **Case Search** option allows you to selec t a court, search for an existing case using the Case Number, Case Description, and or search by Case Date.
	Filings	The **Filings** option lists your most recent filings, filings in progress, submitted filings, filed and rejected filings.
	Favorites	The **Favorites** option contains a list of cases that you have designated as your favorites from the case filing page.
Settings	Contacts & Attorneys	The **Contacts & Attorneys** option contains a list of contacts and attorneys for serving documents in a case already in the TrueFiling application.
	Login Users	The **Login Users** option allows system administrators to add new contacts and attorneys to your firm.
	My Settings	The **My Settings** option allows you to change your password.
	Accounts	The **Accounts** option provides credit card information for payment of filings and fees.
Resources	Admin Guide	The **Admin Guide** option provides you with access to a TrueFiling Admin Guide. **This option is currently under construction.**
	User Guide	The User Guide option provides you with access to a TrueFiling User Guide. **This option is currently under construction.**
	FAQ	The **FAQ** option provides you with access to TrueFiling's Frequently Asked Questions. **This option is currently under construction.**
	About	The **About** option contains system information for system administrators. **This option is currently under construction.**
Training	Online Video	The **Online Video** option provides access to a demonstration of theTrueFiling application. **This option is currently under construction.**

Favorites

The *Favorites* page lists all frequently accessed cases. Cases must be manually added to Favorites in order to appear on the *Favorites* page.

Adding Courts to Your Favorites

To add courts to your Favorites, perform the following steps:

1. From the *Case Search* page, select your court from the **Court** field.
2. Click [Court Lookup] .
3. Locate the court.
4. Click 🔍 **Add to Favorites**.

Adding Cases to Your Favorites

To add cases to your Favorites, perform the following steps:

1. From the *Case Search* page, select your court from the **Court** field.
2. Enter the case number or case description in the **Case Search** field.
3. Enter the from and/or to date in the **Case opened on or after** or **Case opened on or before** field(s).
4. Click [Search] .
5. Click 🔍 **Add to Favorites** to add the case to your favorites.

View Favorites

To view your Favorites, perform the following steps:

1. Click **Favorites** from the left menu option.
2. View your favorites and/or your firm's favorites.

Favorite Cases

🗐 **CourtName : MI ImageSoft 99th Circuit Court**

📄	2009-111111-DM	MI ImageSoft 99th Circuit Court	9/14/2009	SMITH, JUDY vs. SMITH, JACK	Remove
📄	2011-008076-DM	MI ImageSoft 99th Circuit Court	9/14/2009	GERAGHTY, SHARON M vs. GERAGHTY, SHAWN T	Remove
📄	2011-008070-PP	MI ImageSoft 99th Circuit Court	9/14/2009	SHAPTON, JUDITH vs. FRAZER, CARL MORLEY	Remove
📄	2011-026516-CH	MI ImageSoft 99th Circuit Court	4/1/2011	SPOHN, CHARLENE V AUTO CLUB INSURANCE CORP	Remove
📄	2010-028170-NF	MI ImageSoft 99th Circuit Court	9/3/2010	THE LIGHTHOUSE-TRAVERSE CITY L V FARMERS INSURANCE EXCHANGE	Remove

Favorite Courts

Court Name	
🏛 MI ImageSoft 99th Circuit Court	Remove

Getting Help

This section is under construction. Check back at a later date.
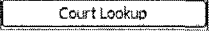
Searching for and Viewing Cases

The Searching for and Viewing Cases section provides you with the necessary knowledge to search for and view cases, view register of actions, add new and existing attorneys, add or remove contacts and add or remove cases from Favorites.

Selecting Your Court

TrueFiling's Web interface is fully integrated with multiple courts. A single user account can file to multiple courts. Communication with the court and filing status are readily available through the eFiling portal.

To search by Case Number, perform the following steps:

1. From the *Court Case Search* page, click [Court Lookup].
2. Select the appropriate court.

Note: Refer to the Favorites section on how to add courts to your favorites.

Court

MI ImageSoft 99th Circuit Court   Remove From Favorites

[Close]

Searching for Cases

You can search cases by case number, case description and case date using associated keywords.

Search by Case Number

To search by Case Number, perform the following steps:

1. From the *Court Case Search* page, select your court from the **Court** field.
2. Enter the Case Number in the **Case Search** field.
3. Click [Search].

Search by Case Description

To search by Case Description, perform the following steps:

1. From the *Court Case Search* page, select your court from the **Case Search** field.
2. Enter the case description in the **Case Search** field.
3. Click [Search].

Search by Case Date
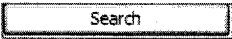
Once a case number or case description has been entered, you can search for specific cases by date or a combination of dates. This date represents the case date, which defaults to the date the document entered the system.

To search by date, perform the following steps:

1. From the *Case Search* page, select your court from the **Court** field.
2. Enter the Case Number or case description in the **Case Search** field.
3. Enter the from and/or to date in the **Case opened on or after** or **Case opened on or before** field(s).
4. Click [Search].

Court Case Search

Court

MI ImageSoft 99th Circuit Court ▼   [Court Lookup]

Case Search (Case Number, Case Description)

[Required]

Case opened on or after   Case opened on or before

[Optional]   [Optional]   [Search]

Search Results

There are no items to show in this view.

Filing Documents

The Filing Documents section provides you with the necessary knowledge to add new filing(s) to a case and submit those filings.

Primary Files and Attachments

The primary document is the case filing and the related documents are attachments to a case to supplement the primary document. For example, the primary document is Order Regarding Custody, Parenting Time or Child Support, Post-Judgment and the attachment is a letter from a child.

Supported File Types

A document to be filed is uploaded from the filers' computer through a browser. A filed document can consist of a primary document and any number of attachments. Uploaded files can be in any of the following supported formats:

- TIFF
- Adobe PDF
- Microsoft Word
- Text
- JPG

Filing Documents

When filing into an existing case, the user first searches by party or docket number and then attaches the required documents. Parties can be added for optional electronic service, which delivers an electronic link to court stamped documents via email. Users may perform electronic service on documents that are filed with the court or on unfiled documents.

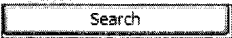**Note:** Before adding a new filing, you must either add attorney or add new attorney.

Create a New Filing

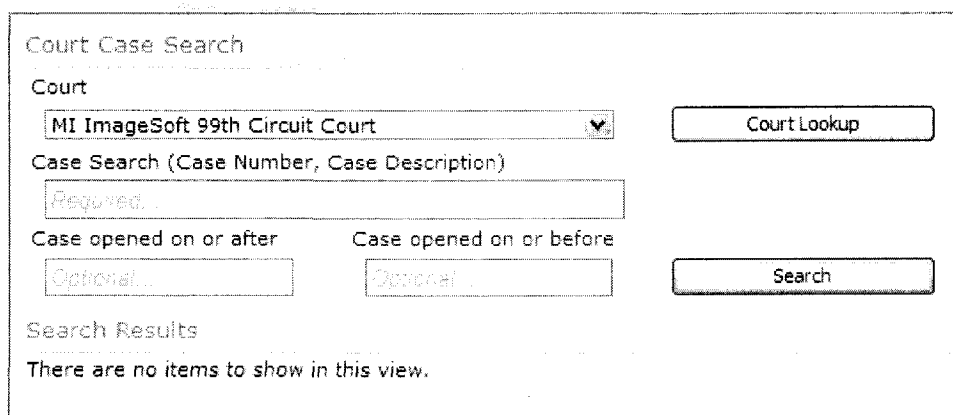To create a new filing, perform the following steps:

1. From the *Court Case Search* page, select your court from the **Court** field.
2. Enter the Case Number or case description in the **Case Search** field.
3. Enter the from and/or to date in the **Case opened on or after** or **Case opened on or before** field(s).
4. Click [Search].

Case: 2011-008076-DM

Case Number	2011-008076-DM
Case Description	GERAGHTY, SHARON M vs. GERAGHTY, SHAWN T
Court	MI ImageSoft 99th Circuit Court

Remove from Favorites

View Register of Actions

Case Filings

Filing Name	Document Type	Status	Filer	File Date	Fee
Sharon and Shewn Geharty	Order Regarding Custody, Parenting Time or Child Support, Post-Judgment	Submitted	spimlott@imagesoftinc.com	7/1/2011	$80.00

Add New Filing

Contacts

Conner, Jennifer	jconner@imagesoftinc.com		Remove
Lowery, Sherri	slowery@imagesoftinc.com		Remove

Add Existing Contact Add New Contact Add Attorney Add New Attorney

---

Note: You can view the history of the case with the court by clicking **View Register of Actions**.

5. Click **Add New Filing** under the **Case Filings** section.

New filing for Case 2011-008076-DM, MI ImageSoft 99th Circuit Court

Select Filing Type   Steps: 1 2 3 4

Filing Name [   ]

Use the following links to access helpful information.

Frequently Asked Questions
Local Governments

Associations & Agencies
Local Resources
State Court Administrative Office and
Court Forms Legal Terms

Please note that filings delivered after 4:30 pm will be date stamped as received the next business day. Filings will appear on the Register of Action within 2 business days of being accepted by the Clerk's office. ~~Judge's copies are not forwarded to the Judges until they appear on the Register of Action.~~
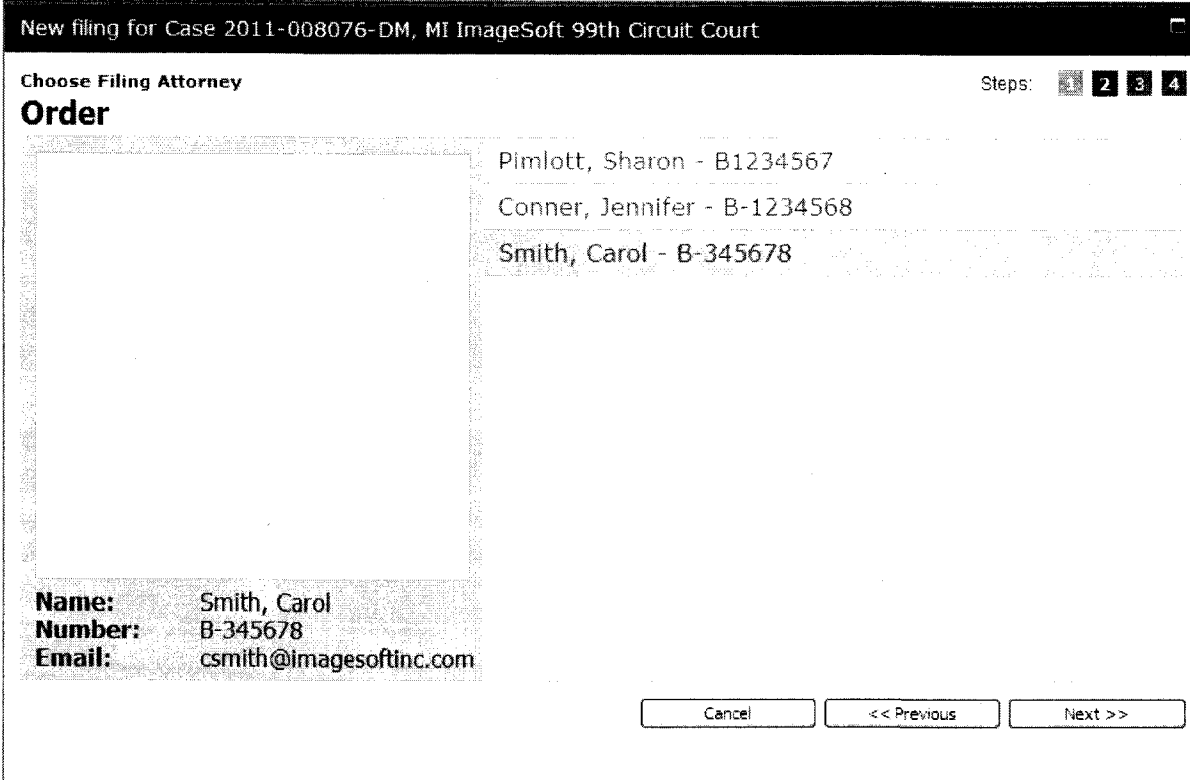
Filing Fee: $15.00
Processing Fee: $0.00
Form URL:

Dismissal, Post-Judgment	$100.00
Dismissal, Pre-Judgment	$20.00
Miscellaneous	$0.00
Motion, Post-Judgment	$100.00
Motion, Pre-Judgment	$25.00
Order	$15.00
Order Regarding Custody, Parenting Time or Child Support, Post-Judgment	$80.00
Order Regarding Support, Post-Judgment	$40.00
Order, Post-Judgment	$80.00
Subpoena	$0.00
Subpoena, Debtor Exam	$15.00

Cancel   Next

---

6. Enter the name of the filing in the **Filing Name** field.

7. Click the document type on the right side of the window. More detailed information for the selected document type appears in the lower left window, such as instructions, fees and possible links to forms.

8. Click ⬚ Next >> .

New filing for Case 2011-008076-DM, MI ImageSoft 99th Circuit Court

Choose Filing Attorney   Steps: ▢ 2 3 4
Order

Pimlott, Sharon - B1234567

Conner, Jennifer - B-1234568

Smith, Carol - B-345678

Name: Smith, Carol
Number: B-345678
Email: csmith@imagesoftinc.com

[Cancel] [<< Previous] [Next >>]

---

9. Select the attorney responsible for the filing to the right. Once you select the attorney, the attorney name, attorney number and email address displays.

10. Click ⬚ Next >> .

New filing for Case 2011-008076-DM, MI ImageSoft 99th Circuit Court

Upload Documents   Steps: 1 2 **3** **4**

Order

Primary File

[   ] [Browse...] [Upload]

Attachments

[Cancel] [<< Previous] [Next >>]

11. Click [Browse...] to attach the document that you want to add as the primary file for the filing.

12. Click [Upload] to load the document. At this time you can add additional attachments using the browse and upload functionality.

13. Click [Next >>] when done uploading all attachments.

14. Select the service method in the **Service Type** field (File Only, File & Serve or Serve Only).

15. Click [Finish].

16. The new filing displays under the **Case Filing** section.

Submit a Filing

To submit a filing, perform the following steps:

1. Click **Filings** from the left menu options.

2. Select the appropriate case.

3. Select the appropriate form of payment in the **Payment Account** field.

4. Click [Submit]. The system displays the message, *"Are you sure you want to submit this filing to the court?"*

5. Click [OK].

Fee	Add'l Fees	Total
$15.00	$5.45 ⑦	$20.45

Payment Account XXXXXXXXXXXXX1234 ▼

Tom Cardholder   10/2012

[Submit]

Note: The filing is submitted to the court. At this time, attachments cannot be added or removed and the service type cannot be changed. However, you can add or remove service recipients, if servicing was previously selected.

Cancel a Filing

You may want to cancel a filing that was entered for various reasons. Contact your Administrator if you need to cancel a filing.

View Filing Status

Information is displayed about the status, document type, filing title, and date filed for each of your filings. Only those filings that you or your firm has submitted are visible rather than all filings in a case. To view a filing status, perform the following steps:

1. From the *Court Case Search* or anywhere within TrueFiling, click **Filings.**

2. View the status filings.

In Progress					
Filing Id	Case Number	Court	File Date	Description	Modified
Order	2011-008076-DM	MI ImageSoft 99th Circuit Court		GERAGHTY, SHARON M vs. GERAGHTY, SHAWN T	7/13/2011 11:40:57 AM
TEST	2011-008076-DM	MI ImageSoft 99th Circuit Court		GERAGHTY, SHARON M vs. GERAGHTY, SHAWN T	7/11/2011 1:56:55 PM
Summons	2010-028098-CZ	MI ImageSoft 99th Circuit Court		ALLMAN & SONS INC V TRIPOLYMER INC, ET AL	7/1/2011 3:54:43 PM
Transcript	2010-028098-CZ	MI ImageSoft 99th Circuit Court		ALLMAN & SONS INC V TRIPOLYMER INC, ET AL	7/1/2011 3:53:42 PM
Request and Order to Seize Property	2010-028098-CZ	MI ImageSoft 99th Circuit Court		ALLMAN & SONS INC V TRIPOLYMER INC, ET AL	7/1/2011 3:52:49 PM

Page 1 of 2 ▶

The following filing statuses are available:

Status	Description
In Progress	A filing has not been submitted.
Submitted Filings	Your filing has been sent to the E-Filing System. The time stamp reflects the date and time of your submission once the filing has been accepted. A filing must be submitted by 4:30 p.m. to be filed that business day. Otherwise, the time stamp date reflects the next business day at 8:30 a.m.
Filed	Your filing has been received by the court and is waiting to be reviewed.
Rejected Filings	A filing envelope is rejected if ImageSoft has identified problems with your credit card or if the Clerk's Office has determined that the filing was directed to the wrong case. On the Details screen, ImageSoft uses the Transaction Response section to note any problems with payment. On the same screen, the Court uses the Review Comments section to note other explanations for rejection such as those listed above.

Court Notifications

Event notifications and status changes are delivered to the user through email. This section is under construction. Check back at a later date.

Electronic Document Service

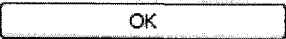The Electronic Document Service section provides you with the necessary knowledge to service documents.
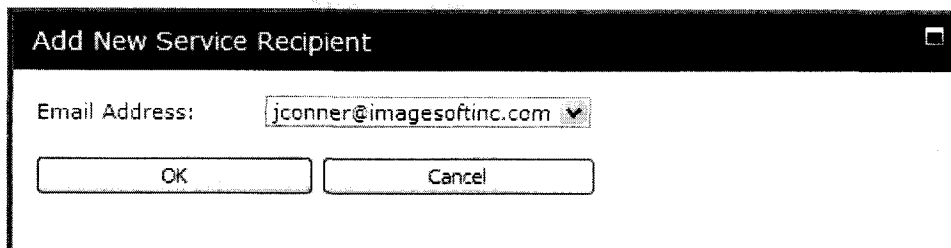
Service Recipients

The system provides the ability to add service recipients to a specific filing. A service recipient requires an email address to be considered serviceable.

An organization has the ability to maintain a list of contacts and attorneys which can be used as service recipients. The filing organization can add contacts as potential service recipients for each specific case. Filing organizations can only edit or remove their own contacts for a case. Contacts can be added as service recipients when creating a filing. Service recipients can be excluded during the time of filing and added after a filing is submitted to allow it to be served to new recipients as long as they paid for servicing.

Adding a Case Contact as a Service Recipient

To add a case contact as a service recipient, perform the following steps:

1. From within an existing filing, click ⊕ **Add New** in the **Service Recipients** section.
2. Select contact from the **Email Address** drop-down field.
3. Enter the appropriate email address of the service recipient
4. Click [OK].

Add New Service Recipient ◻

Email Address: [jconner@imagesoftinc.com ▾]

[OK] [Cancel]

Note: The new service recipient displays in the **Service Recipients** list.

Adding a Non-Case Contact as a Service Recipient

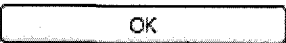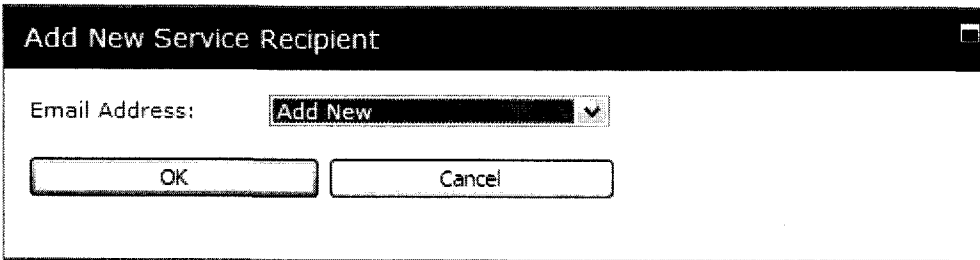To add a non-case contact as a service recipient, perform the following steps:

1. From within an existing filing, click 🔍 **Add New** in the **Service Recipients** section.
2. Select **Add New** from the Email Address drop-down field.
3. Enter the appropriate email address of the service recipient
4. Click [OK].

Note: The new service recipient displays in the **Service Recipients** list.

Add New Service Recipient

Email Address: Add New   ∨

[OK]   [Cancel]

Removing Service Recipients

1. From within an existing filing, locate the service recipient under the **Service Recipients** section.
2. Select each contact you wish to remove.
3. Click **Remove**.

Serving Documents

When a filed document is paid for servicing, TrueFiling serves the documents to all of the service recipients through e-mail. The system tracks the mail transaction history in order to provide verification of electronic submission to a mail transfer agent. Each served party is sent a unique URL providing them access to the served documents. Previously filed documents can be re-served to any recipient without requiring a new filing or additional charges.

TrueFiling Notifications

This section is under construction. Check back at a later date.

Service History

The Service History tracks when the served party logs in and if they opened a document. This section is under construction. Check back at a later date.

Subpoena, Jack and Judy Smith

	Fee	Add'l Fees	Total
	$0.00	$8.00 ⑦	$8.00

Document Type	Subpoena
Case Number	2009-111111-DM
Case Description	SMITH, JUDY vs. SMITH, JACK
Court	MI ImageSoft 99th Circuit Court
Filing Status	Submitted
Filing Fee	$0.00

Payment Account   XXXXXXXXXXXXX1234
Tom Cardholder   10/2012

File Only $5.00   ● File & Serve $8.00   Serve Only $5.00

Service Recipients

Address	Served	Viewed
☐ ✉ dmayernik@imagesoftinc.com	No	No
☐ ✉ slowery@imagesoftinc.com	No	No
☐ ✉ spimlott@imagesoftinc.com	No	No
☐ ✉ rsmith@imagesoftinc.com	No	No

✉ Remove   ✉ Re-Send   ✉ Add New

Primary File

File Name
OnBase End User Training Web Client Documentation v.2.5.docx   1707 kb

Attachments

File Name

Transaction History

The Transaction History section provides you with the necessary knowledge to view the transaction history of cases and filings.

Recent Activity

This section is under construction. Check back at a later date.

Transaction History

		Timestamp	Status	Comments
📎	🔄	7/11/2011 12:41:51 PM	In Progress	.
	🔄	7/11/2011 12:40:46 PM	In Progress	Still reviewing documents
	🔄	6/30/2011 2:02:24 PM	In Progress	Received record at 2:02 PM on 6/30/2011. Respond

Fees and Payments

The Fees and Payments section provides you with the necessary knowledge to understand the fee and payment process.

The eFiling portal manages all billing transactions and account reconciliation with the court.

Standard Fees

The TrueFiling system provides filing organizations with the ability to register accounts which are used to record fees and provide billing information. No fees are assessed until after a document is approved by the court. Fees are determined by the court based on filing type. No additional fees are charged to the filer for use of the electronic filing system.

Credit Cards

When an organization registers with the system, they are able to pay with a credit card at the time of filing (pay as you go). Credit card information is securely stored within the system and associated with a specific User or Filing Organization. An account must have a valid credit card associated with it. The credit card is verified for sufficient funds at the time of filing. No fees are charged against the credit card until after a document is approved by the court.

Indigent Status

This section is under construction. Check back at a later date.

Managing Settings

The Managing Settings section provides you with the necessary knowledge to add contacts, add attorneys, update user settings and change user passwords in the TrueFiling application.

The *My Contacts* page contains the contacts for serving documents in a case already in the TrueFiling application.

Add Contacts

Before adding contacts to your Firm Contact List, review the list first to avoid duplicate entries. Once you have established the list does not contain the contact you wish to add, you must first select a case. This avoids duplicate entries for the same service contact. There are two ways in which to add contacts:

1. Add contacts through the **Contacts & Attorneys** left menu option.
2. Add contacts through an existing case.

Note: Adding a contact through an existing case is equivalent to adding contacts through the **Contacts** left menu option and associating that contact with the case.

Add New Contacts

To add new contacts through the **Contacts & Attorneys** left menu option, perform the following steps:

1. Click **Contacts** from the left navigation menu.
2. Click **Add New Contact**.
3. Enter the contact information
4. Click [OK].

Add New Contact   ☐ ✕

Add New Contact

First Name   Last Name

Address

City   State   Zip
                        Michigan   ▼
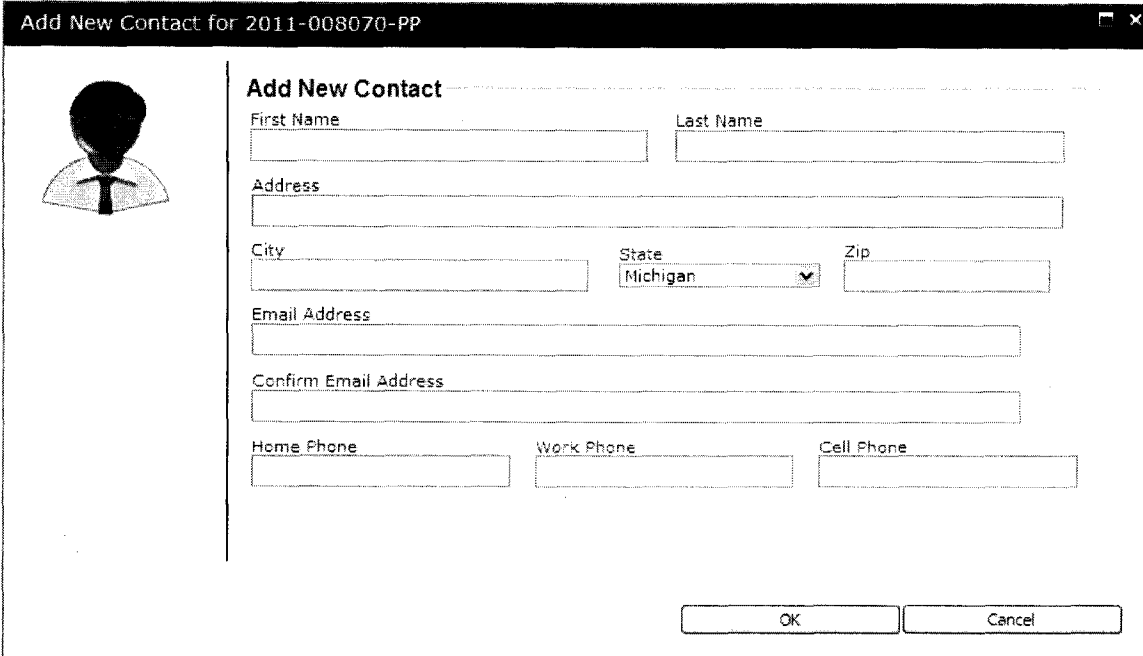
Email Address

Confirm Email Address

Home Phone   Work Phone   Cell Phone

                                        [OK   ] [Cancel   ]

To add new contacts through an existing case, perform the following steps:

1. Click ⊕**Add New Contact** in the **Contacts** section.
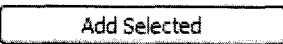
2. Enter the contact information

3. Click [OK].

Note: The case number displays in the header of the *Add New Contact* window.

Note: The contact added to the case was automatically added to the contacts listed in your contacts list and is available to be added to other cases.

Add New Contact for 2011-008070-PP

Add New Contact

First Name

Last Name

Address

City

State
Michigan

Zip

Email Address

Confirm Email Address

Home Phone

Work Phone

Cell Phone

[OK]   [Cancel]

Add Existing Contacts
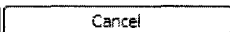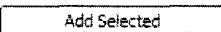
To add an existing contact, perform the following steps:

1. Perform a search for the appropriate case.
2. Click ⚑ **Add Existing Contact**.
3. Select the appropriate contact from the list.
4. Click [Add Selected].

Note: The contact is added to the **Contacts** list.

Add Contact for 2011-008070-PP

	Last Name	First Name	Title	Email
☐	Hyso	Joanne	Contact	jhyso@imagesoftinc.com
☐	Lowery	Sherri	Contact	slowery@imagesoftinc.com
☐	Smith	Robert	Contact	rsmith@imagesoftinc.com

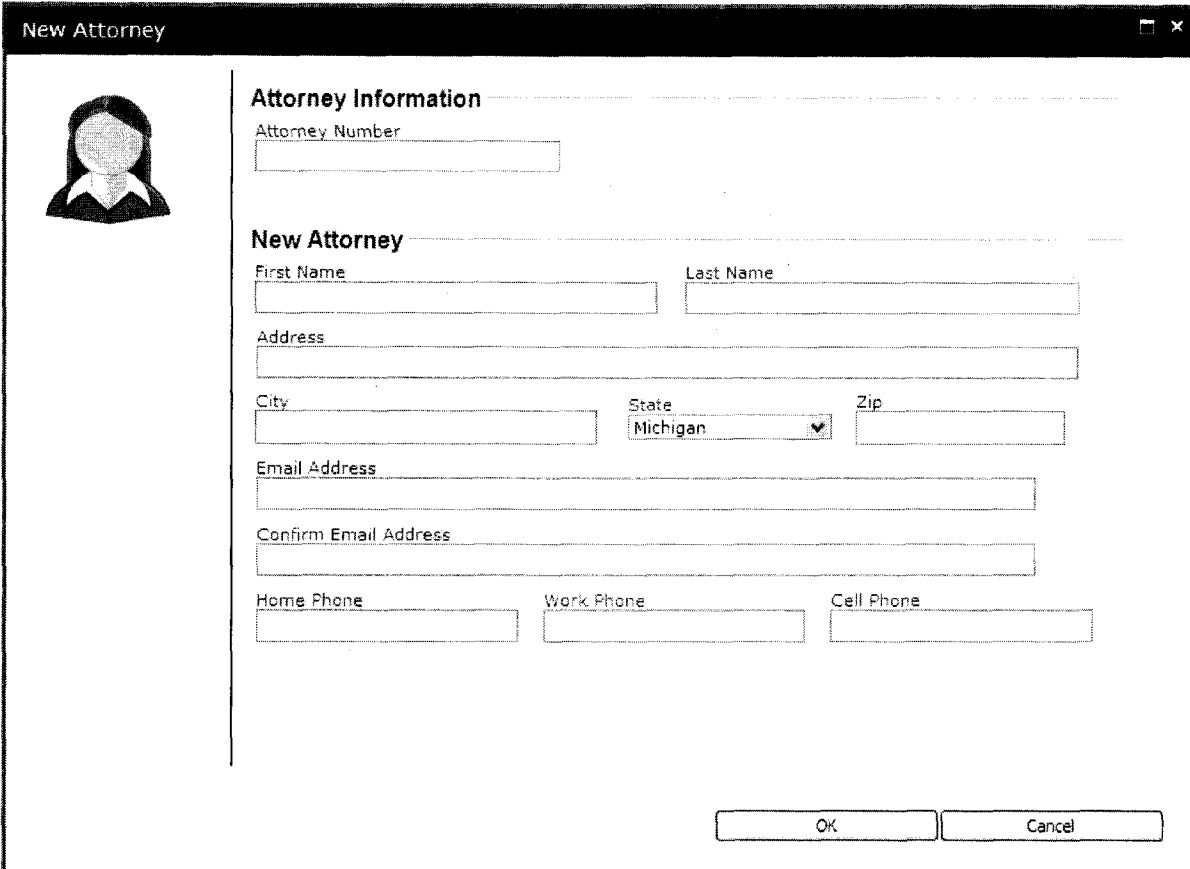[Add Selected] [Cancel]

Add Attorneys

Add New Attorneys

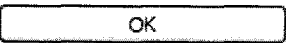There are two ways in which to add attorneys:

1. Add attorneys through the **Contacts & Attorneys** left menu option.
2. Add attorneys through an existing case.

To add new attorneys through the **Contacts & Attorneys** left menu option, perform the following steps:
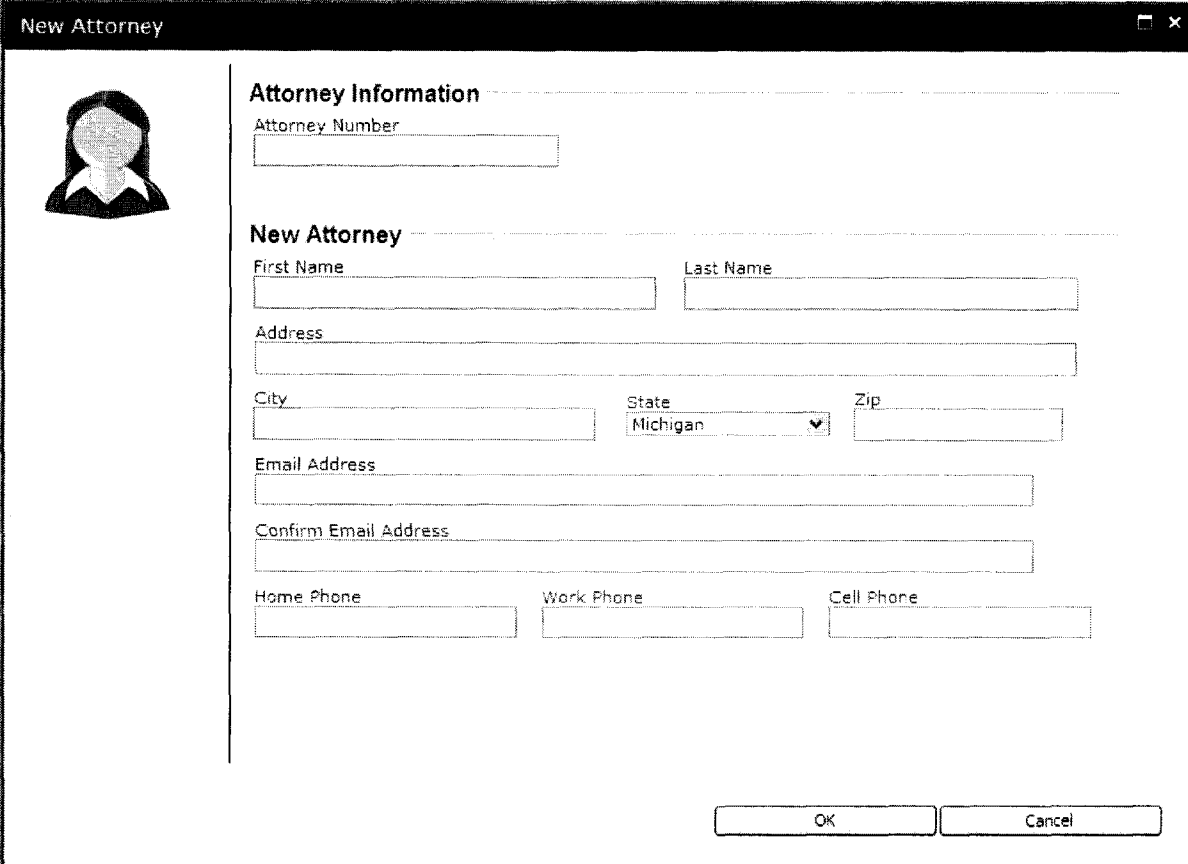
1. Click **Contacts & Attorneys** from the left navigation menu.
2. Click ⚑ **Add New Attorney**.
3. Enter the Attorney Number.
4. Enter the contact information
5. Click [OK].

New Attorney ☐ ✕

Attorney Information
Attorney Number
[_____]

New Attorney
First Name   Last Name
[_____]   [_____]

Address
[_____]

City   State   Zip
[_____]   Michigan ▼   [_____]

Email Address
[_____]

Confirm Email Address
[_____]

Home Phone   Work Phone   Cell Phone
[_____]   [_____]   [_____]

[OK] [Cancel]

To add new attorneys through an existing case, perform the following steps:

1. Perform a search for the appropriate case.

2. Click 🔒 **Add New Attorney** in the **Contacts** section.

3. Enter the new contact information for the attorney.

4. Click [　　　OK　　　].

Note: The new attorney is added to the **Contacts** list.

Add Existing Attorneys

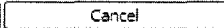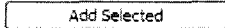To add an existing attorney, perform the following steps:

1. Perform a search for the appropriate case.

2. From within an existing case, click 🔒 **Add Attorney**.

3. Select the appropriate attorney.

4. Click [Add Selected].

Note: The attorney is added to the **Contacts** list.

	Last Name	First Name	Title	Email
☐	Conner	Jennifer	Attorney	jconner@imagesoftinc.com
☐	Pimlott	Sharon	Attorney	spimlott@imagesoftinc.com
☐	Smith	Carol	Attorney	csmith@imagesoftinc.com

Add Attorney for 2011-008070-PP

[Add Selected] [Cancel]

Passwords

If you have appropriate privileges, you can change your TrueFiling login password.

1. To access this function, select **My Settings** from the **Navigation** menu.
2. Enter the current password in the **Old Password** text box.
3. Enter the new password in the **New Password** text box.
4. Enter the new password again in the **Re-type Password** text box.
5. Click ⟨ Change Password ⟩ .

```
Password Change
Just for the record, your password was last changed on Tuesday, July 05, 2011.

Old Password
[                    ]
New Password
[                    ]
Re-type Password
[                    ]

[  Change Password  ]
```

Appendix

Appendix: Glossary of Terms

Term	Description
Filer	A person performing the task of filing a document through the E-Filing system
Filing Organization	An organization (normally a law firm) that has an account on the system for filing.

This section is under construction. Check back at a later date.