TrueFiling

TrueFiling™ Quick Start Guide

ImageSoft

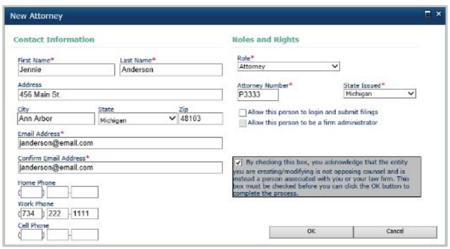
Log on to TrueFiling

1. Go to www.TrueFiling.com.

2. Input your **Username** and **Password**.
3. Click Logon.

Add an Attorney or Staff Member to Your Firm

1. Select **Settings >> Contacts and Attorneys** in the navigation pane.
2. Click Add New Attorney / Add New Contact / Add New Self-Represented Filer.



3. Input the contact information.
4. Select the appropriate **Role**.
5. Input the **Attorney Number** (for Attorney only; defaults to Pro Per for Self-Represented Filer).
6. Select the **State** where the Attorney Number was issued (disabled for Firm Staff/Employee/Client).
7. Select the acknowledgement checkbox to confirm this person is not a member of opposing counsel.
8. Click **OK**.

Set Email Notifications

1. Select **Settings >> My Settings** in the navigation pane.

2. Select when to receive TrueFiling email notifications.
3. Click Save Preferences.

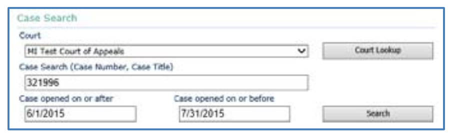
Initiate a Case

1. Click **Main Pages >> eFile** in the navigation pane.
2. Click the **Initiate a Case** button.
3. Select the **Court** from the drop-down list.

4. Select the **Form of Initiation**.
5. Select the **Filing Attorney**.
6. Click **Create**. A dialog is displayed for case detail entry.
7. Input the case details. * indicates a required field.
8. Click Finish. The case initiation Bundle Detail page is displayed.
9. Correct any Validation Errors listed.
10. Select the appropriate **Payment Account**.
11. Click Submit.
12. Click **OK** on the confirmation dialog.

Search for a Case

1. Select **Main Pages >> Case Search** in the navigation pane.



2. Select the **Court** from the drop-down list.
3. Input the Case Number or Case Title.
4. Input a date range to refine the search, if needed.
5. Click Search.
6. Click the Case Number in the Search Results to launch the Case Detail.

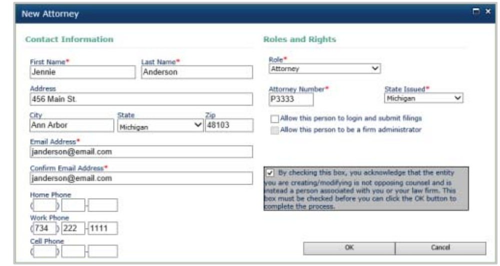
Add a Firm Member as a Case Contact

1. Click Add Attorney / Add Contact / Add Self-Represented Filer on the Case Detail page. A dialog displays firm members not yet associated to the case – for example, attorneys:

2. Select the checkbox beside the member(s) to add.
3. Click Add Selected.

Add a New Contact to a Case and to Your Firm

1. Click Add New Attorney / Add New Contact / Add New Self-Represented Filer on the Case Detail page.



2. Input the contact information.
3. Select the appropriate **Role**.
4. Input the **Attorney Number** (for Attorney only; defaults to Pro Per for Self-Represented Filer).
5. Select the **State** where the Attorney Number was issued (disabled for Firm Staff/Employee/Client).
6. Select the acknowledgement checkbox to confirm this person is not a member of opposing counsel.
7. Click **OK**.

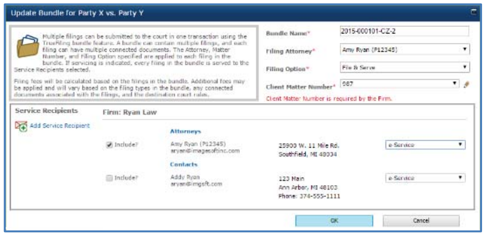
Add Registered Opposing Counsel as a Case Contact

1. Click Find Opposing Counsel on the Case Detail page.
2. Input the attorney name, number, firm name, or email address as the search criteria.
3. Select the checkbox to include **Contacts and Pro Per filers** in the search results (optional).
4. Click **Search**.

5. Select the box beside those to add as case contacts.
6. Click Add Selected.

Create a Bundle and Its Filings

1. Access the Case Detail page of the case to file against.
2. Click Create New Bundle.

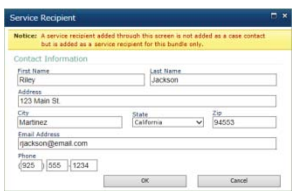


3. Edit the default **Bundle Name** (optional).
4. Select the **Filing Attorney.**
5. Select the **Filing Option**.
6. Input a **Client Matter Number** (may be required).
7. Select the **Include?** checkbox to indicate service recipients for the bundle.
8. Select the service method for each recipient.

Add an ad hoc service recipient for this bundle

This person is added only as a service recipient for this bundle; they aren't added as a case contact.

a. Click Add Service Recipient.



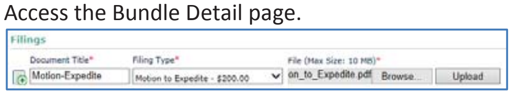
b. Input the Contact Information and click **OK**.

9. Click **OK** to close the dialog. The bundle is added to the Case Detail page.

Add a Filing to the Bundle

Document files for each filing type must be separated.

1. Access the Bundle Detail page.



2. In the Filings section, input the **Document Title**.
3. Select the **Filing Type**.
4. Click **Browse** (or **Choose File**), locate and select the file, and click **Open**.
5. Click Upload to upload the filing to the bundle.
6. Continue to add filings as needed.

Add a Connected Document

A connected document is a separate filing that's associated with a filing – Appendix, Exhibit, or Other Related document.

1. Locate the filing on the Bundle Detail page.
2. Click Add Connected Documents.

3. Input the **Document Title**.
4. Select the **Filing Type** from the drop-down list. The types listed are determined by the Court.
5. Click **Browse** (or **Choose File**), locate and select the file, and click **Open**.
6. Click Upload to upload the connected document.
7. Continue to add connected documents as needed.
8. Click **Close** to return to the Bundle Detail page.

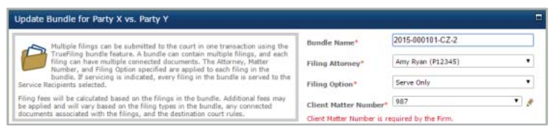
Submit the Bundle

1. Access the Bundle Detail page.
2. Select the Payment Account from the drop-down list. You can select **Settings >> Payment Accounts** to add a new account, if needed.
3. Click Submit.
4. Click **OK** on the confirmation dialog.

Change a Filing Property to "Serve Only"

Available only if the bundle hasn't been submitted.

1. Access the Bundle Detail page.
2. Click **Edit Service Recipients / Bundle Properties**.



3. Select **Serve Only** from the **Filing Option** drop-down list.
4. Click **OK** to close.

Download the Proof of Service

1. Access the Bundle Detail page.
2. Click Filed Proof of Service to download a PDF of the bundle's Proof of Service.
3. You should save the file locally for your records.
4. Open the file to verify the service recipients.

Download an Official File Stamped Copy

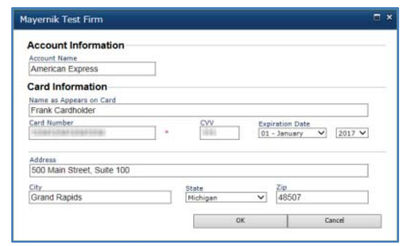
1. Select **Main Pages >> History** to launch the History page.
2. Select the **Filed** tab.
3. Locate the appropriate bundle and filing.
4. Click the **Filing Name**. The Filing History is displayed. (You can also access the Filing History by clicking a filing's **Document Title** on the Bundle Detail page.)
5. Click the paperclip icon beside the **Filed** timestamp to download a PDF of the file stamped copy.
6. Open the file to confirm it's the document submitted.

Download a Filing's Payment Receipt

1. Select **Main Pages >> History** to launch the History page.
2. Select the **Filed** tab.
3. Locate the appropriate bundle and filing.
4. Click the **Filing Name**. The Filing History is displayed. (You can also access the Filing History by clicking a filing's **Document Title** on the Bundle Detail page.)
5. Click the paperclip icon beside the **Paid** timestamp to download a PDF of the payment receipt.
6. Open the file to confirm the fees charged.

Add a Payment Account

1. Select **Settings >> Payment Accounts** in the navigation pane.
2. Click Create New Account.



3. Input the **Account Information**.
4. Input the **Card Information**.
5. Click **OK**. The card will be validated for accuracy before being added as an account.