Tybera

eFlex Electronic Filing

USER'S GUIDE FOR FILERS

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EFILING BASICS

This user's guide is intended to instruct filers on the features of the eFlex system.

The eFiling system is designed to make the work associated with initiating and processing a case more efficient and convenient for both filers and court personnel. Not only does the Interface allow filers to submit their documents to the court electronically, it also provides means for them to view case histories, check the status of their submissions, send follow up documents and access service lists.

For court staff, the software routes the filings to the appropriate personnel for review, response, generation of additional documents, or further action. For most integrations, when documents are filed in hard copy, once the court personnel have scanned the documents, the filer interface distributes a courtesy notice to electronic participants on the case and those participants may access the documents electronically.

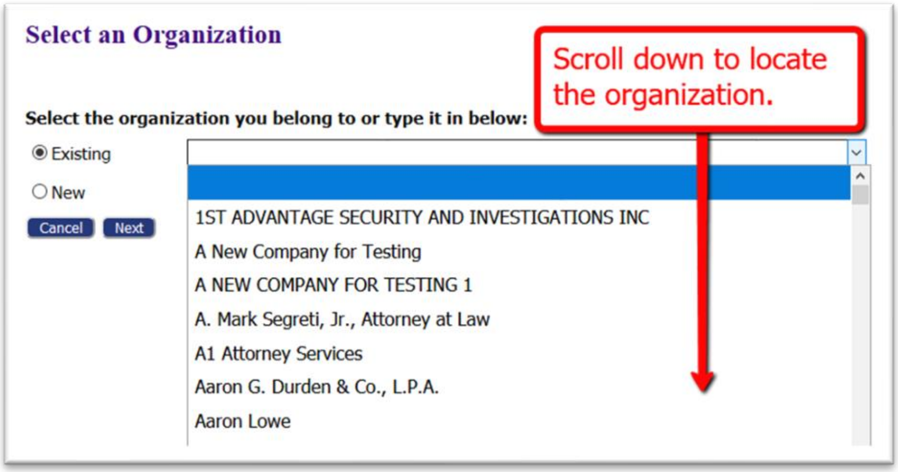
In addition to the fields inside the login box: **Username, Password**, **Forgot your password**, **Forgot your user name**, and **Request Account**, the **login page** is also used to post occasional messages from the system administrator to the filers, such as announcing upcoming system maintenance that will make the system unavailable for a set period of time. Links to rules may also be posted for the convenience of the filer.

Located at the bottom of the Login page, and each subsequent page throughout the eFiling process, are informational hyperlinks which, when clicked, will direct the user to more information to assist them: **eFiling Quick Reference Guide**, **Terms of Use**, **Privacy Policy**, **Payment Policy**, **Support**, and **about Tybera Development Group, Inc**.

REQUESTING AN ACCOUNT

1. Click the button **Request Account** on the **Login** page.
2. Read the **User Agreement.** Select the **radio button** at the bottom of the page that agrees to the contract. Click the **Submit** button.
3. Scroll though the drop-down list in the **Existing** field and click the appropriate organization.

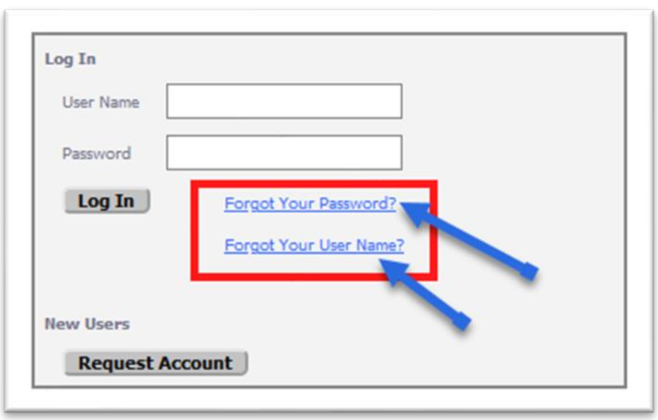
Image: Selecting an Organization when Requesting an Account



4. If the organization is not listed, click the radio button **New** and type the name in the provided field.
5. On the **Request a User Account Page,** create a user profile. Fields marked with an asterisk* are required. Click **Submit**.
7. **Login** is available *after* notification is received that the account request has been approved.

FORGOTTEN USERNAME OR PASSWORD

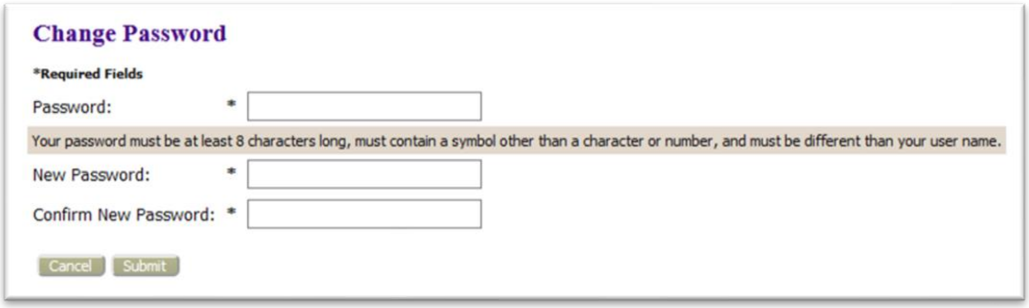
Image: Forgot Password or User Name



A. FORGOT PASSWORD

1. If you have forgotten your password, click **Forgot Your Password** on the **Login page**. The *Request Password Reset* page will appear.
2. Enter your username and click **Submit**.
3. An email containing a link will be sent to the account listed on your user profile. Upon clicking the link, you will be directed to a page with a temporary password that you may use to login to the eFlex system.
4. After login, hover over the **My Profile Tab** and select **Change Password** from the dropdown menu.
5. Enter the temporary password in the **Password field**.

Image: Change Password Page



6. Create a new password following the password requirements and type it into the **New Password field**. Be sure that the password you select is one you will remember, contains eight characters, including a special character (such as an exclamation point, asterisk, or period), and is different from your username.
7. In the **Confirm New Password field**, re-type the password exactly as you entered it in step 6.
8. Click **Submit** to save your changes.
9. Be sure you notify your legal assistant, or any others who may enter your filings for you, of the change in password.

B. FORGOT USERNAME

If you have forgotten your username, click **Forgot Your User Name** on the **Login page**. A page will appear asking you to enter the *primary email address* associated with your account.

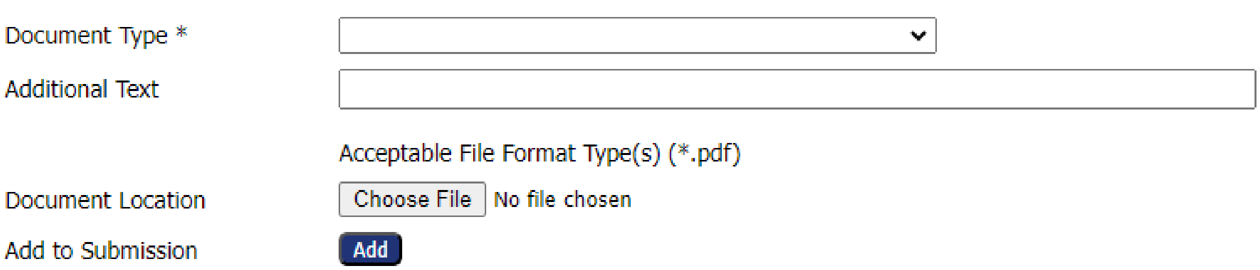
1. Fill in your primary email address and click **Submit**.
2. Check your email account for a message sent from the eFlex system. It will contain your username.

DOCUMENT PREPARATION PRIOR TO EFILING

Documents must be submitted in an accepted format. Failure to do so will generate an error message.

- Documents need to be submitted in a **PDF format**.

Image: Text that Identifies Acceptable Format Type for Document Upload

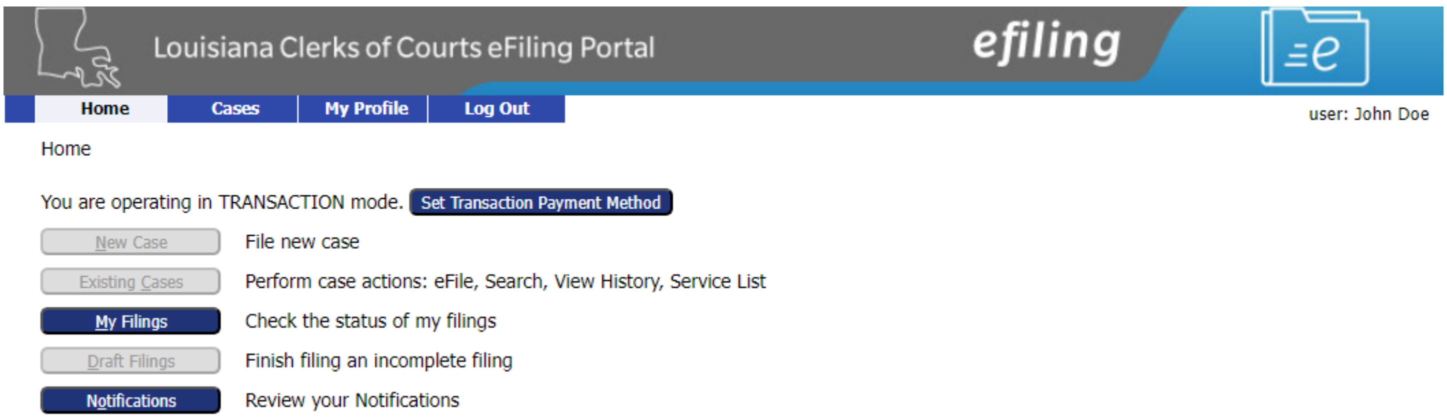


- Using only PDF format also applies to exhibits such as copies of contracts, copies of cancelled checks, etc. Scan and save these items as a PDF instead of jpg or jpeg.
- Individual document size is limited to **100 MB**. Multiple documents can be included in a single submission. The size limitation for an entire submission is **300 MB**.

- To keep the file size down when scanning, use the black and white setting rather than color (unless the loss of the color degrades the value of the evidence.) Color increases the size of a file. Another option to reduce file size is to reduce the dpi, as long as the resolution is high enough to make the document readable.

REGISTERING THE EFILING CONVENIENCE FEE PAYMENT METHOD

As a newly approved account holder, when you first log into your eFiling account, you'll find that the buttons **New Case**, **Existing Cases**, and **Draft Filings** are inaccessible. You cannot click on them to proceed with any action. In order to access the functionality of the eFiling service, you must first establish the method by which you will pay for the eFiling service.



Click on the button at the top of the **Home page** labeled **Set Transaction Payment Method**. You will be directed to the third-party vendor's site where the payment set-up may be completed.

THE TRANSACTION PAYMENT METHOD

The **Transaction Payment Method** will charge a $6 fee for each submission through the efiling system regardless of whether or not a court fee is assessed with the filing. Once the **Transaction Payment Method** is set up, the user will have the ability to file to a new or existing case. They will also be able to access case histories, notifications, filing statuses, etc.

* If the card for the Transaction Payment Method needs to be updated, follow the instructions under SET THE TRANSACTION PAYMENT METHOD FROM THE USER PROFILE PAGE*

SET THE TRANSACTION PAYMENT METHOD FROM THE USER PROFILE PAGE

1. Click on the My Profile button at the top of the page, and select My Profile from the dropdown list.

2. At the bottom of the User Profile section, click on the Set Transaction Payment Method button.

3. The screen will be routed to the third-party vendor's site. Input the card and billing information, agree to the terms of use, and submit payment.

* If the card for the Transaction Payment Method needs to be updated, follow the above instructions.*

CREATE A WALLET TO PAY FOR COURT FEES

The wallet section under the My Profile tab will enable the filer to pay for all court fees associated with case initiation and document filings.

1. Click on the My Profile button at the top of the page, and select My Profile from the dropdown list.

2. At the bottom of the User Profile section is a list of the parishes available to efile to. Click the Add button next to desired parish.

3. Enter a description or nickname for the card being entered. Click Add next to the description line.

4. The screen will be routed to the third-party vendor's site. Input the card, or checking, and billing information, agree to the terms of use, and submit payment. The screen will be routed back to the My Profile screen, and the card will now be listed under the selected parish.

DELETING A CARD FROM THE WALLETS SECTION

1. Click on the My Profile button at the top of the page, and select My Profile from the dropdown list.

2. Under the Wallets section, find the parish and card to be deleted. Click on the Delete button next to the card.

3. A popup at the top of the screen will ask if the wallet should be deleted. Select OK to delete card, or Cancel.

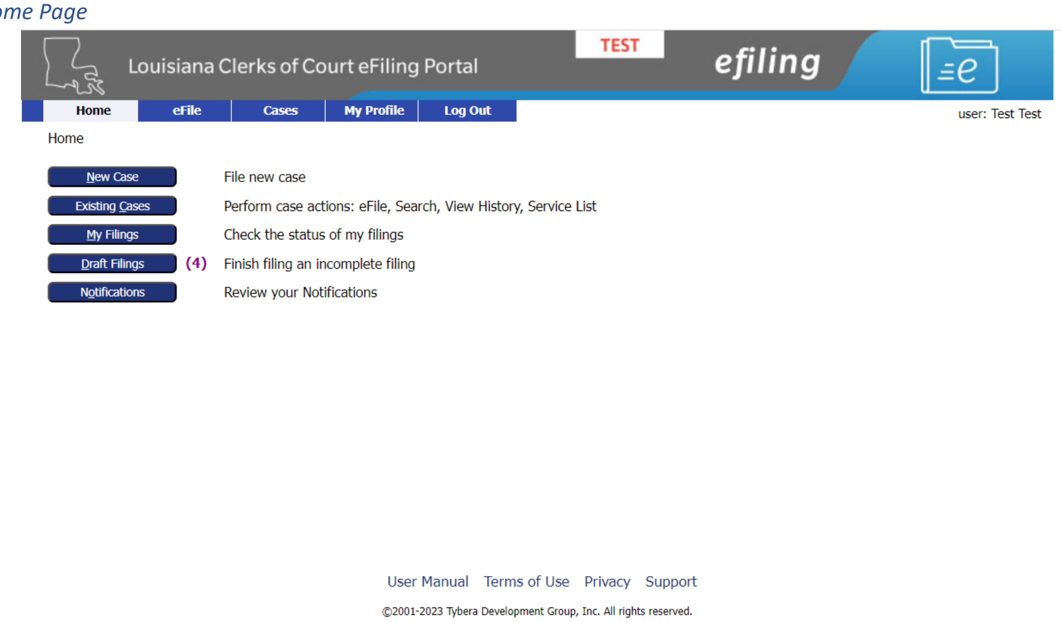
4. If deleted, the card will no longer show on the Wallets section.

NAVIGATING THE FILER INTERFACE

THE HOME PAGE

The **Home page** of the **Filer Interface** is the first screen upon login. The **Home Buttons** provide quick access links to take the user to the screens most often visited. The user may also navigate the interface using the **Menu Bar** which is conveniently located across the top of every page. Hover over each tab to display page options available for the filer. Many of these menu items are replicated as a Home button.

Image: The Home Page



- Any number in parentheses next to the **Buttons** indicates the number that has yet to be acted upon by the filer.
- The **username** appears in the upper right corner of the screen, based on the user's profile information.

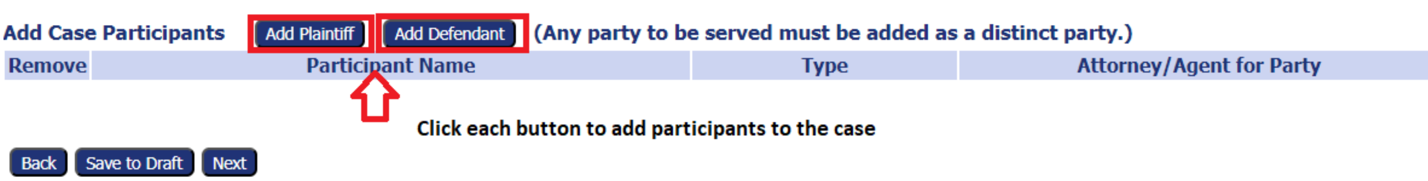
- For best results, users are strongly encouraged to use only the navigation buttons that are displayed on the eFiling interface, rather than using the internet browser back arrow. These navigation buttons will appear at the bottom of each page and will give the user options such a **Back** or **Next**.
- Another navigation tool is the **breadcrumb trail** displayed at the top of every page, just under the **menu bar**. The active links show the pages the user has visited to get to the current page. Clicking any of these links will take the user back to the page listed.
- This is a web application. The web session will terminate automatically if there is no activity on the webpage for 20 minutes. A session is considered active as long as there is interaction with the web server, such as clicking **Next** or the **Submit** button. Typing in a text field does not count as being "active."

Buttons on the Home Page

INITIATING A NEW CASE

1. On the **Home Page**, click the **New Case** button. Alternately, hover over the eFile Tab and select New Case from the drop-down selections.
2. Click the appropriate **Jurisdiction**; click the desired **Case Category**; click the desired **Case Type**. Each page choice filters the available options on the next page.
3. On the **Case Initiation page:**
   a) Click the **Add Plaintiff button** to be directed to the **Add a Party Page**.

Image: Buttons to add Case Parties



4. On the **Add a Party page**:
   a) Select the appropriate radio button for **Company** or **Person** and fill out text fields for information that you have, noting that fields with an asterisk are required in order to add the party to the case.
   b) It is unnecessary to fill out the section **Add an Attorney for this Party** because the attorney filing will automatically be added as the attorney on the case since they are the one initiating the case for their client.
   c) Click **Next** at the bottom of the page to return to the **Case Initiation page**.
5. On the **Case Initiation page**:
   a) To add additional plaintiffs, click the **Add Plaintiff button** again and repeat the listed steps above.
   b) Click the **Add Defendant button**.

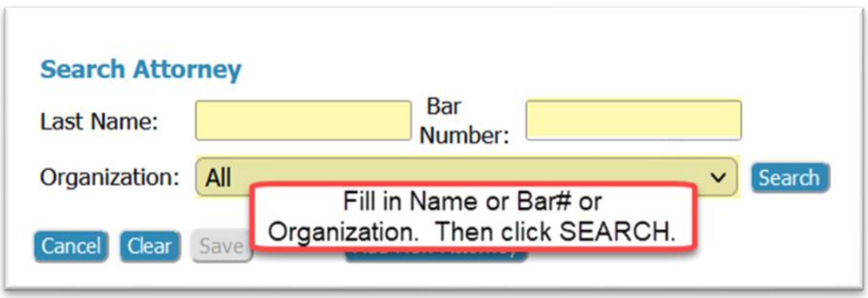
c) Create the profile following the steps above.

d) If the opposing attorney information is known, click the **Add button** under the **Add an Attorney for this Party** section.

Image: Click the Add Button

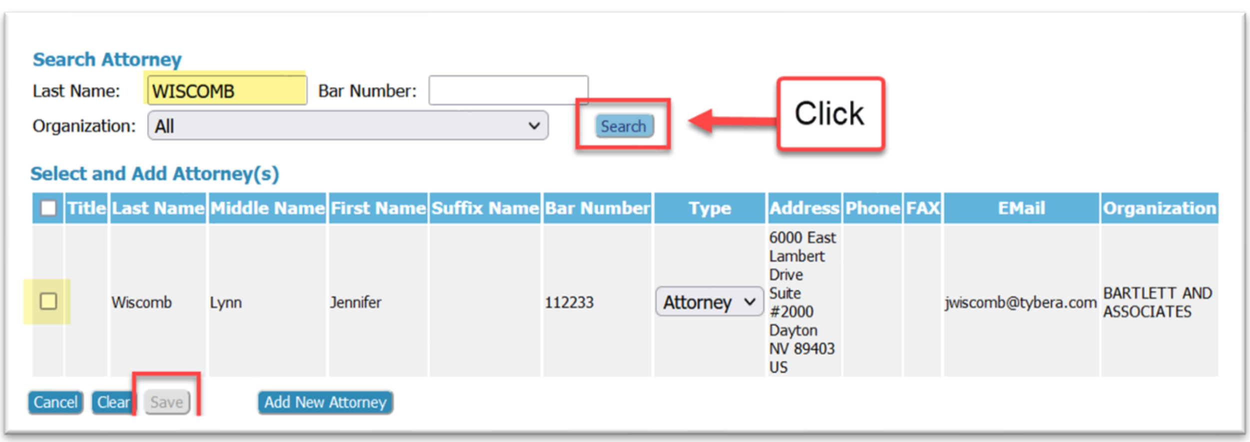
e) Choose to fill in either the attorney's last name, the bar number, or the organization. Click the **Search button** to see if this individual is in the system.

Image: Attorney Search Fields



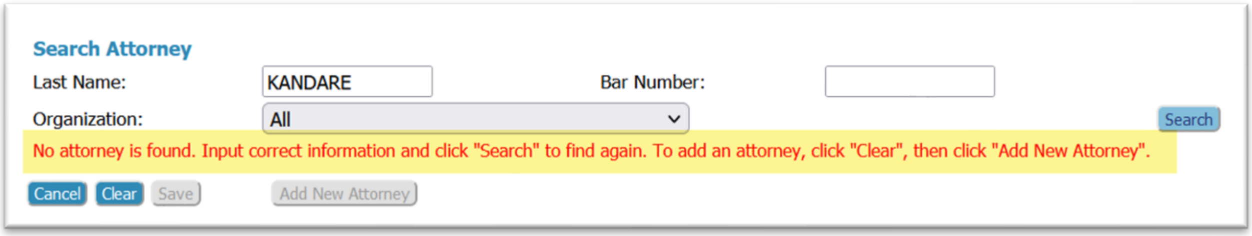
f) The system will display possible matches, especially if an organization field has an entry and multiple attorneys may appear. Mark the checkbox next to the correct attorney. This will enable the **SAVE button** to be clicked. **Click** to proceed.

Image: Clicking Search opens a Table if there is a Match



g) If there is not a match in the system, a red text message will appear. One may opt to skip the **Add an Attorney for this Party** section of the page, or choose to click the **Clear button** and proceed by clicking the **Add New Attorney button**.

Image: Red text Message will Appear if there is No Match



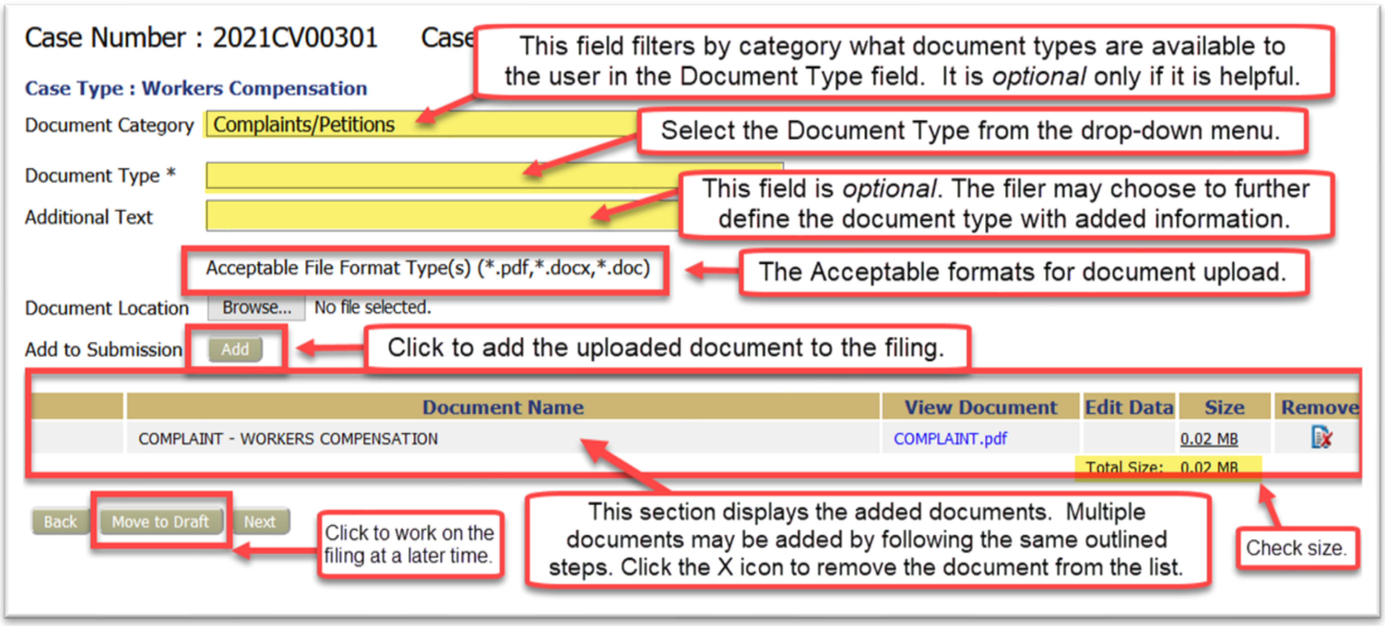
h) The **Add/Edit New Attorney Details pop-up box** will appear when the **Add New Attorney button** is clicked. Fill in the fields will all known information. Be aware that the fields marked with an *asterisk* are required. Click the **Save button** at the bottom.

Image: The Add/Edit New Attorney Details Pop-up Box.

i) Click the **Next button** at the bottom of the page to continue with the case initiation.

6. View the case participants listed. Click their *hyperlink name* to make any edits. Click **X** to remove them. Click **Next** to proceed.
7. On the **Add a Document Page:**

Image: The Add a Document Page



a) **Document Type -** Select the appropriate document type from the drop-down menu.

b) **Additional Text –** Enter text in this *optional field* to give greater detail to the document type, if desired. This description will display as part of the document listing in the **Case Summary**.

c) Take note of the system acceptable **File Format Types** when choosing a document to upload. Choosing the wrong type will result in an error message.

d) **Document Location –** Click the **Browse** button to locate the document on your computer.

e) **Add –** Click to upload the selected document to the filing.

NOTE: Some document types require additional information. When applicable, after clicking **Add,** the user will be directed to another screen which will request the additional information. An example would be a *Notice of Case Association* for Pro Se filers. Fill out the requested information and click **Next**.

Add subsequent documents one at a time. (The total submission size must be less than 300 MB.) To view the listed document, click its *hyperlink title*. To delete, click the **Remove icon**.

f) **Move to Draft Button –** Click if you choose to finish the submission at a later time. All data will be saved. (To retrieve the **Draft** later, hover over the **eFile tab** and select **Draft Filings**. Click the ***hyperlink Description*** to proceed with the filing.)

g) Click **Next** when all documents have been added.

8. **Review and Approve Filing Page** – The filer is able to view, edit, add/or remove documents, select a payment method if applicable to the filing, go back to a previous page in the case initiation, cancel the filing, move the filing to be a draft in order to act on it at a later time, or submit the filing to the court.

   a) **The Client #** - This optional field is a convenience for filers with an internal filing system.

b) If there are required fees associated to the filing, the amount due will display as *estimated fees*. Any wallet items that have already been created will be listed below the *Estimated* Fees. Click the radio button next to the card. To add a new payment method, click the **Add Wallet Item button** next to the *Estimated Fees* and add a description for the new payment method. The screen will be rerouted to the third-party payment vendor's site. Enter in the card and billing information (Note that fields with an asterisk* are required), then click Create Payment. The Review and Submit Filing page will be displayed again. Click on the radio button for the desired Wallet Item. Payment of all fees is required before the filing will be submitted to the court. If applicable to the filing, click the radio button **Indigent, Court Exempt** or **Deferral**.

Image: Top Portion of the Review and Submit Filing Page

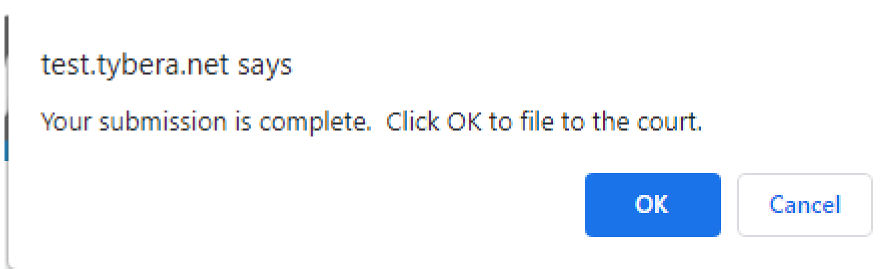
c) The **Change Case Data button** enables the filer to return to the **Case Initiation page** to edit case participant information.

d) Click the *hyperlink document title* to view the documents. Click the **Add/Remove Document button** to make changes.

e) Use the optional **Special Filing Instructions field** as a means to communicate with the court.

f) Click the button **Submit the Filing.** You may also choose to select **Back** or **Move to Draft** as needed.

g) A popup at the top of the screen will state thet the filing is complete. Click the blue OK button to file to the court.



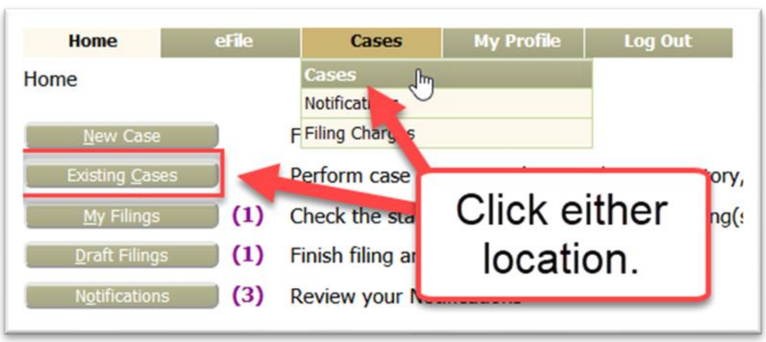
NOTE: When you initiate a new case as a case participant, the case number will automatically be added to your "*Cases*" list. These may be view by hovering over the **Cases Tab** in the menu bar and selecting **Cases** from the drop-down list. The **Cases data table** is a useful tool to easily find case-relevant information.

Existing Cases

FILING TO AN EXISTING CASE

On the **Home Page**, click the **Existing Cases** button. Alternately, hover over the **eFile Tab** on the **Menu Bar** and select **Existing Case** from the drop-down list. This directs the user to the **Cases Page.** The **Cases page** not only allows a filer to efile to an existing case, it also gives the user easy access to cases, documents filed to the cases, and to the service list information associated to a particular case at the time of the query.

Image: Navigating to the Cases Page



1. Select the parish the case is in.
2. The top portion of the **Cases page** displays a Case Number text field. Enter a case number and click one of the three buttons to its right:

Image: Action Buttons on the Cases Page

- The **eFile button** - This button directs the user to the **Add-a-Document page** to proceed with a new filing.
- The **History button** - This opens a new browser tab and displays the **Case History**.
- The **Service List button** - This opens a new browser tab and identifies those case parties who will receive a filing's notification electronically or those who will need to be served in the traditional manner. (This list will vary moment to moment depending on when new filers request an efiling account and gain access to electronic notification.)

3. The **Search Cases button** is also used in conjunction with entering a case number in the **Case number field** when the user chooses to locate the case within the **Case Data Table**.

Image: The Search Button to Find a Case inside the Case Data Table

4. The bottom portion of the page displays the **Case Information Table**.

Image: The Case Information Table

- The data in each column has an ascending/descending sort feature that sorts alphabetically or numerically. Click the **column header** of choice to cause the table display to be organized according to the header selected. Clicking the column header a second time reverses the order of the displayed information.
- Hovering and pausing over any blue text hyperlink will pop-up a help guide for the user explaining what action will happen if you click on it.
- Clicking the **+sign** next to any listing in the **Case Title column** will *expand* the section and display the case documents. Clicking the ***hyperlink*** **Document Title** will open the document for viewing, printing, or saving. Clicking the **– sign** will *collapse* the section.

a) Clicking the ***hyperlink case number*** in the **Case Number column** on the line of the intended case, will open a new browser tab and display the **Case History**, which includes case participant information. Clicking the plus button next to Show/Hide Participants will display the case participant information.

Image: The Case History Page Displays in a New Browser Tab

Case Number	024682
Case Type	CIVIL `
Opened	02-16-2023
Status	Active

Plaintiff	GULFCO OF LOUISIANA, LLC, D/B/A TOWER LOAN OF TALLULAH
Defendant	JOSEPHINE EZELL
Judge	
Amt. of Claim	$.00
Jury/Non Jury	Non Jury

⊟ Show/Hide Participants

Plaintiff	Counsel of Record
GULFCO OF LOUISIANA, LLC, D/B/A TOWER LOAN OF TALLULAH	GRAY H. MCCRAW, III

Defendant[s]	Counsel of Record
JOSEPHINE EZELL SAINT JOSEPH, LA 71366	GRAY H. MCCRAW, III
JUD[s] LAURIE BRISTER	Counsel of Record
ATT[s] GRAY H. MCCRAW, III	Counsel of Record JOSEPHINE EZELL SAINT JOSEPH, LA 71366

File Date	Case History

b) Clicking the ***eFile hyperlink*** on the **Case History page** will direct the filer to the **Add a Document page** to proceed with a new filing to the existing case.

c) Clicking the ***hyperlink Service List*** in the **Service List Column** opens a new browser tab and identifies those case parties who received a filing's notification electronically or by traditional means. (This list will vary moment to moment depending on when new filers request an efiling account and gain access to electronic notification.)

Image: The Service List Displays in a New Browser Tab

Service List

Service List RE: 21-CV-0062

Case Number:	21-CV-0062
Judge:	Judge John P. Schlegelmilch - Dept 1 - Division 4234
Court:	Third Judicial District Court Family
Case Title:	CRELLIN VS. MASON

This certificate was automatically generated by the courts auto-notification system.

Date Generated: 07-21-2021:09:55:19 AM

As of 07-21-2021, the electronic filing system will send a Notice of Electronic Filing (NEF) to the following parties:

Mark Klein for KELLY CRELLIN

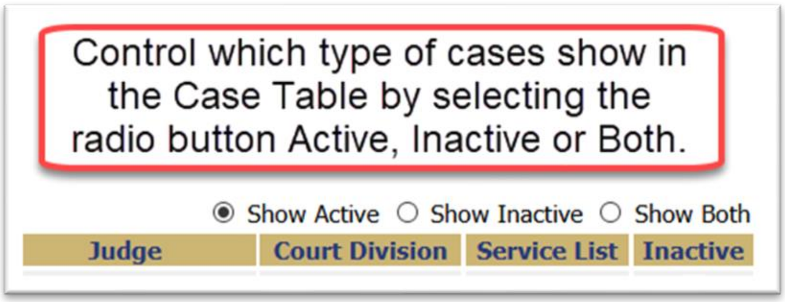
The electronic filing system will not send a Notice of Electronic Filing (NEF) to the following parties, who must be notified by a traditional method of service:

MELINDA MASON

Address: MELINDA MASON
89 N STRATFORD AVENUE
ECHO, NV 78987

d) Marking the checkbox in the **Inactive column** gives the user the option to hide the case from view by clicking their choice of radio buttons: **Show Active**, **Show Inactive** and **Show Both.**

Image: Radio buttons on the Cases Page



NOTE: Any user with a correct case number can efile on a case; however, users will not be to view a case history unless they are a party on the case or counsel of record.

My Filings

CHECKING THE STATUS OF A FILING

On the **Home Page**, click the **My Filings button** to be directed to the **My Filings page**. Alternately, hover over the **eFile Tab** on the **Menu Bar** and select **My Filings** from the drop-down list.

Image: Navigating to the My Filings Page

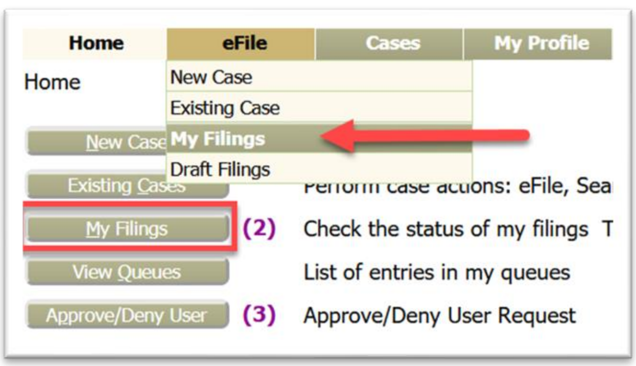
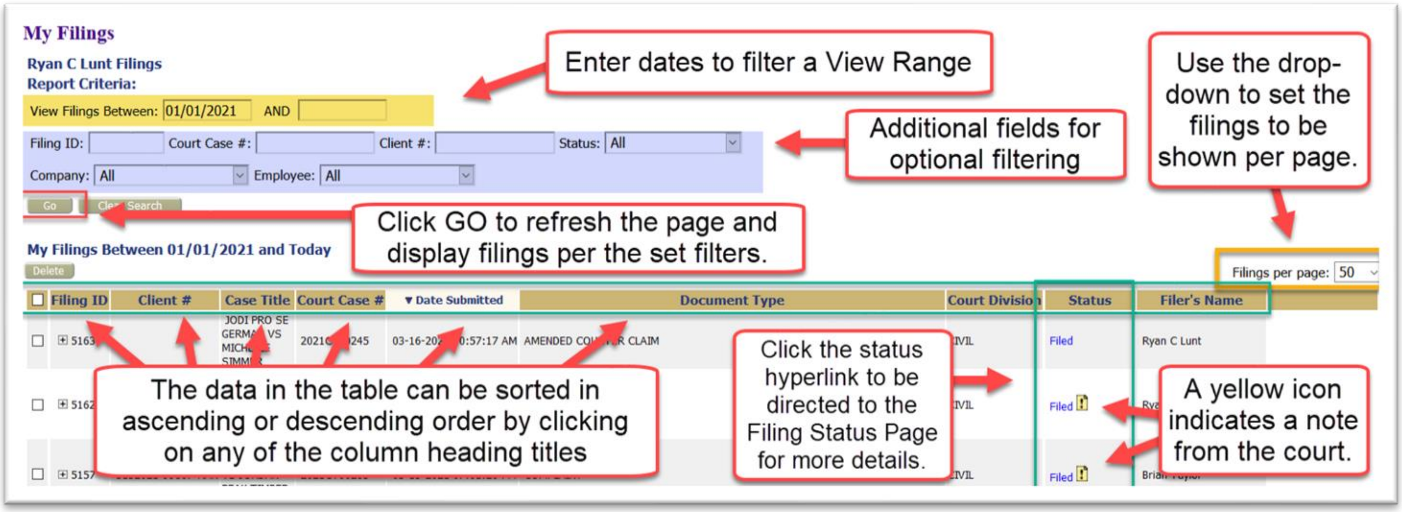


Image: Overview of the My Filings Page



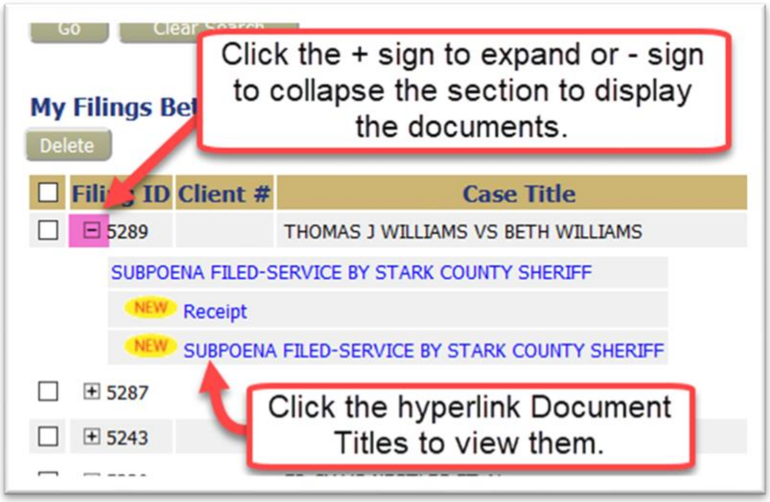
1. Use the *filtering fields* at the top of the page to narrow your search: Filing ID, Court Case #, Status, or Client # (This number corresponds to the *optional* **client # field** on the **Review and Submit page.** It is offered as a convenience to the filer if they have an internal filing system related to their clients. It is not a number used by the efiling system.) For the fields **View Filings Between**, set the date to include the date of submission. Click **Go** to refresh the page and locate the submission listing.

2. **Column headers** in the data table have an ascending/descending sort feature that sorts alphabetically or numerically. Click the **column header** of choice to cause the table display to be organized according to the header selected. Clicking the column header a second time reverses the order of the displayed information.

3. The default column for the data table is the **Date Submitted column,** which means the most recent filings will be at the top. This is recognized by the block color difference of the column header that is controlling the data display. If another column is selected for filtering, this will become the new default setting for the session. If you leave the page and return again in the same time session, it will stay as the default setting. However, if you logout or the session terminates because of inactivity, when you log back in, the setting will refresh and the **Date Submitted** will once again resume as the default column header.

4. Clicking the **+ sign** in the **Filing ID column** *expands* the section and displays the documents in the filing. Click the **– sign** to *collapse* the section. To view the documents, click their **hyperlink name**.

Image: The + sign expands the section to view the documents in the filing



5. When viewing the expanded section after clicking the **+ sign**, if **Receipt** is one of the documents displayed, this means the filing has been processed and its status is **Filed**. The Receipt document is the **Confirmation of Receipt** document sent to the filer from the court. Click its *hyperlink* to open a new browser tab to view or print this document.

6. The right column is the **Status column**. This column allows the filer to follow the progress of the filing through its various stages of processing. Some statuses happen so quickly that each stage may not visibly be tracked. Clicking the **Go button** will refresh the page view and post any changes in the status. Once it has been completely processed, the Final state is **Filed**.

   Other statuses include:

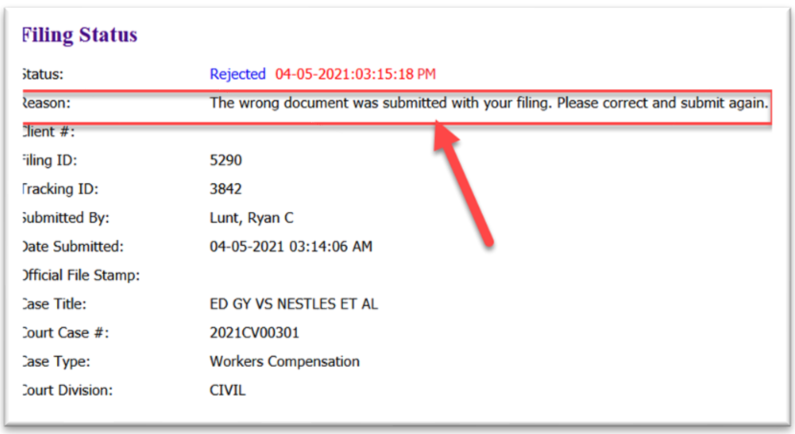
   - **Received** - The submission has received a time stamp and will be placed in a queue for further processing.
   - **Awaiting Approval** - The submission is in a queue for further processing.
   - **Receipt Pending** - An error occurred in communications. Call the e-Filing administrator.
   - **Rejected** - Submission was denied. See the note from the clerk for an explanation. To start the resubmission process, click **Resubmit**.
   - **Filed** – The final status of the filing. No further action. The filer should look at their case history or receipt of the submission to download signed documents and check for notes from the Clerk.
   - **Accepted-Presented to Judge** –Accepted and routed to a Judicial Queue for a judge to review. This means that even though the submission has been filed, the proposed document may not have been reviewed at this time, but it has been presented to a judge.
   - **Resubmitted** - This submission was "Rejected," and the filer used the old submission to create a new submission. The status of this submission has no future value, and the filer needs to look at the new submission status.

7. Click the ***status hyperlink*** to be directed to the **Filing Status Page**. (see pg 22 for the section: Accessing the stamped documents and Confirmation of Receipt.)

RESUBMITTING A REJECTED FILING

1. If a clerk rejects a filing, they are instructed to enter a note for the filer to explain the reason why. With these instructions, the filer can correct the filing and resubmit it. The system flags the filer of the note using an *exclamation point inside a yellow rectangle*. Clicking the *hyperlink status* of the **Rejected**, listed under the **Status Column**, the user will be directed to the **Filing Status page** where they may read the note written by the clerk or in some instances, the message generated by the system.

Image: The Message returned to the Filer on the Filing Status page

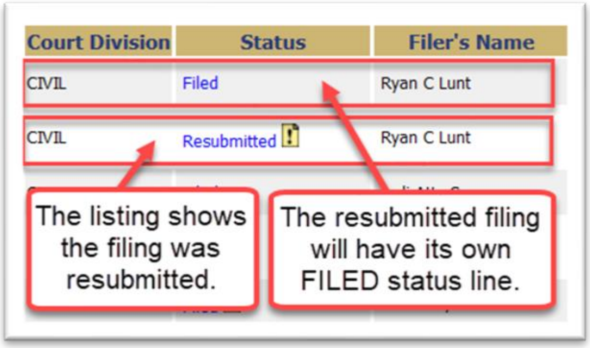


2. The system will also generate a "one-time-use" **Resubmit button** which will display to the right of the status column.

Image: The Rejected and Resubmit Buttons

3. Click the **Resubmit** button. This will cause the eFlex system to *clone the information* from the rejected submission and route the user to the **Add a Document page** where the user can make the necessary corrections to the filing and proceed to resubmit the filing back to the court.
4. After the corrections have been made, click **Next.**
5. On the **Review and Approve Filing page** click **Submit.**
6. The **Filing Status page** will now display a **Resubmitted status** for the first filing and will create a new line for the resubmitted filing.

Image: The Display of the Resubmitted Status



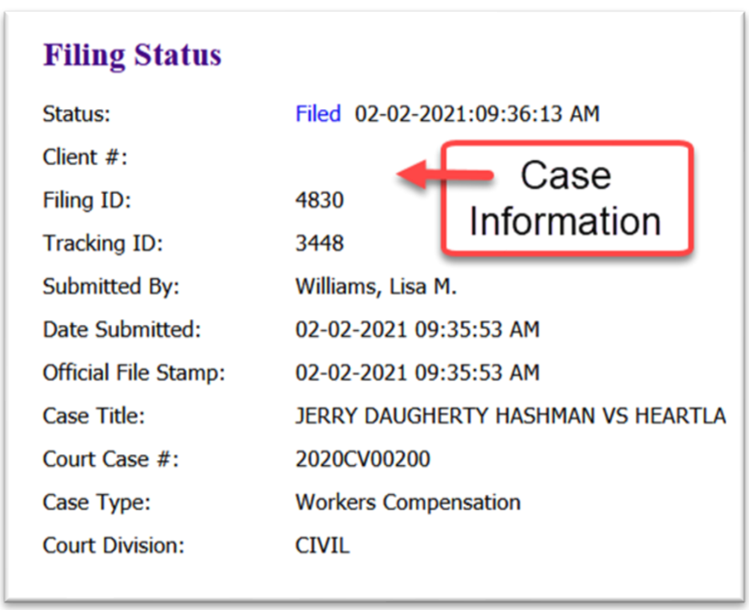
ACCESSING THE STAMPED DOCUMENTS & CONFIRMATION OF RECEIPT

The **Filing Status Page** allows you to access documents that were filed with your case for either viewing or printing purposes.

1. On the **My Filings page**, click the submission's **hyperlink status** inside the **Status Column**.

Image: The Hyperlink Status on the Filing Status Page

Image: Top Portion of the Filing Status Page

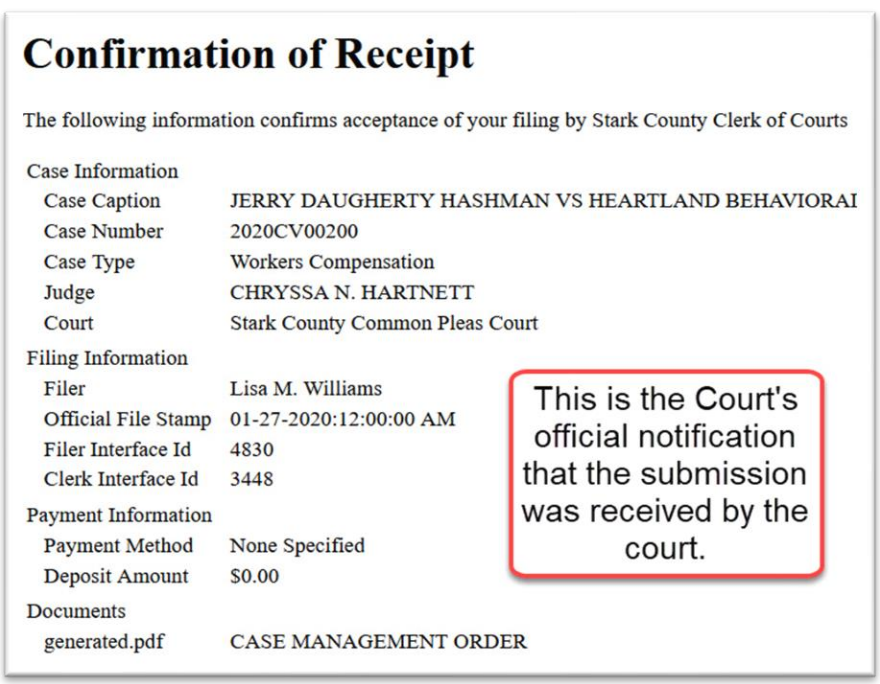


2. The Documents, as filed in the original submission, will display in the section with the column headings **Document Name** and **View Document**. These documents do not have the court's time and date stamp.

Image: Bottom Portion of the Filing Status Page

3. Below the horizontal line is the **Response section**. This section displays the documents after they have been processed with the court's time and date stamp on them. When applicable to the document type, it will also have the court's electronic signature. Click the documents' hyperlink listings to display the document in a newly opened browser tab. Any document that is listed as *generated.pdf* is a system-generated document. Do not open the *form.xml link* as this is simply computer code that the system administrator can use for information should troubleshooting be necessary.
4. The **Confirmation of Receipt** is the Court's official notification that the submission was received. Click the **hyperlink receipt.html** to open a new browser tab to display the **Receipt.** It is recommended that you print or save a copy for your records because documents will be removed from your Filer Interface after 30 days.

Image: The Confirmation of Receipt



Confirmation of Receipt

The following information confirms acceptance of your filing by Stark County Clerk of Courts

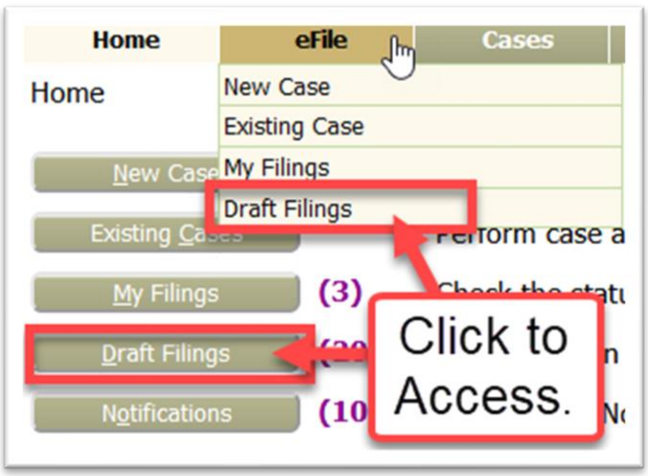
Case Information	
Case Caption	JERRY DAUGHERTY HASHMAN VS HEARTLAND BEHAVIORAI
Case Number	2020CV00200
Case Type	Workers Compensation
Judge	CHRYSSA N. HARTNETT
Court	Stark County Common Pleas Court
Filing Information	
Filer	Lisa M. Williams
Official File Stamp	01-27-2020:12:00:00 AM
Filer Interface Id	4830
Clerk Interface Id	3448
Payment Information	
Payment Method	None Specified
Deposit Amount	$0.00
Documents	
generated.pdf	CASE MANAGEMENT ORDER

Draft Filings

INCOMPLETE FILINGS

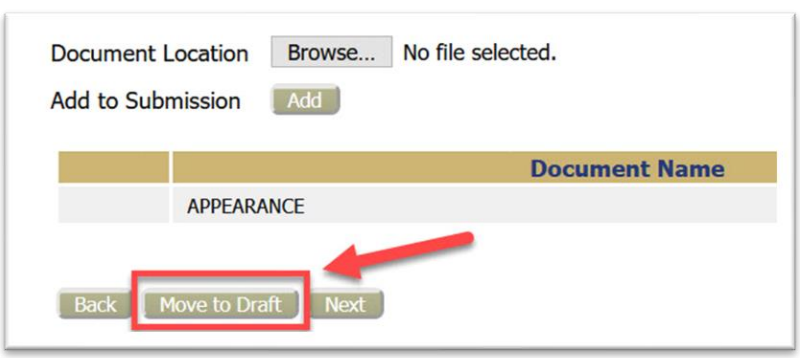
On the **Home Page**, click the **My Filings button** to be directed to the **My Filings page**. Alternately, hover over the **eFile Tab** on the **Menu Bar** and select **My Filings** from the drop-down list.

Image: Navigating to the Draft Filings page



During the process of creating a filing, a filer may need to stop their work, save it, and continue their filing at a later time. The **Save to Draft button**, located at the bottom of each filing page, is used for this purpose. Additionally, eFlex uses the **Draft feature** as a backup should the internet connection unexpectedly go down

Image: The Move to Draft Button at the Bottom of each Filing Page



To retrieve the Draft later, click the **Draft Filings Button** or select from the **Menu Bar**. A list of any partially completed submissions will display. To proceed, click the *hyperlink Description* on the line of the filing you intend to complete. Most submissions will default to the **Add a Document page.** If you need to back up to the **Case Initiation page**, press the **Back** button on the **Add a Document** page.

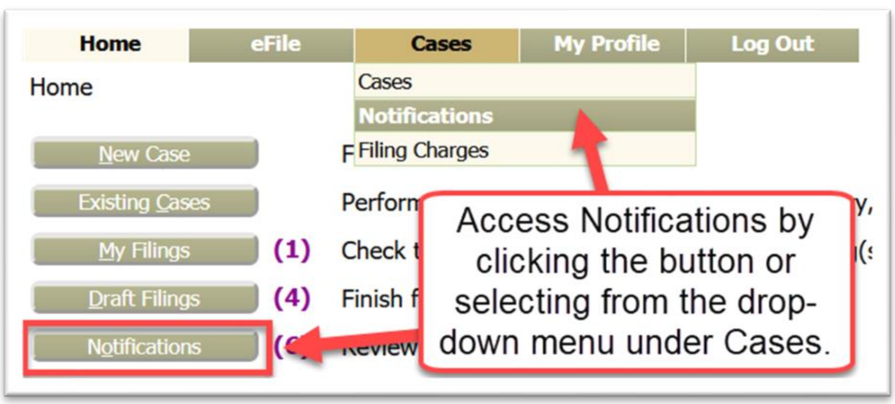
Image: Click the Hyperlink to Proceed with the Draft Filing

Notifications

NOTIFYING THE CASE PARTIES

On the **Home Page**, click the **Notifications Button** to be directed to the **Notifications page**. Alternately, hover over the **Cases Tab** on the **Menu Bar** and select **Notifications** from the drop-down list. If there is a number in parentheses next to the **Notifications** button, this indicates how many "unread" notifications currently exist.

Image: Navigating to the Notifications Page



The eFlex system generates emails, or *courtesy notifications*, to communicate with the efiling account user when filings are submitted on their cases. All email addresses entered in their profile will receive the email messages. There are 3 types of email notifications sent:

- Received Notice – This states that their submission was *received* by the court.
- Accepted Notice – This states that their submission was *accepted,* or approved and recorded by the court.
- Courtesy NEF – The "NEF," which means *Notice of Electronic Filing*, identifies document(s) that were filed to the court and which case participants received electronic notification through the eFiling system and which participants need to be served in the traditional manner. Addresses for the latter are included for mailing purposes. A link inside the NEF email is provided to direct the filer to the login page and then on to the **Notifications page** where the *official notification*, along with the documents, may be viewed.

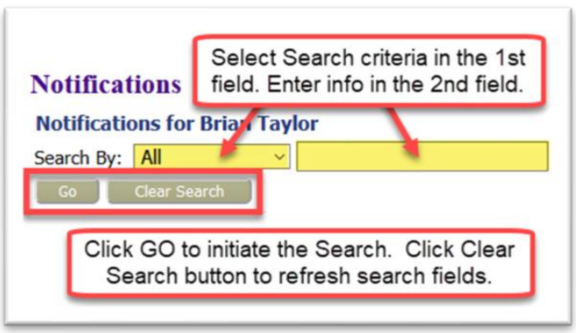
NOTE: Once you have efiled on a case and have been added as a party to that case by the clerk of court, your username will be associated with that case. When someone else sends a follow-up submission on any case on which you have been indexed as a participant, you will receive a *courtesy email* of this action and an *official notification* on your **Notification page.**

NOTE: For participants on the case that *do not* have an efiling account, it is required of the efiling user to continue the practice of service to those participants via paper and to include the **Certificate of Service** as part of the documents in the filings.

OVERVIEW OF THE NOTIFICATIONS PAGE

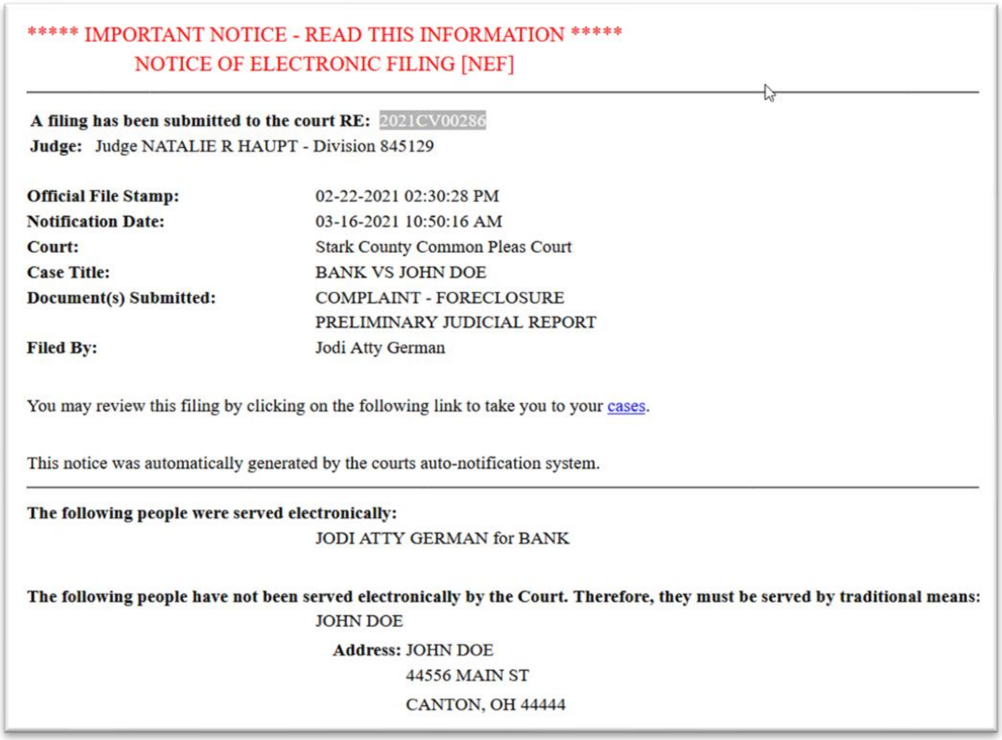
1. Use the two **Search By fields** at the top of the page to filter the display of information in the **Notifications Data Table**. In the left field, select a search category from the drop-down menu: Notification ID, Description, Case Title, Case Number, or Court Division. In the right field, enter the corresponding information. Click **Go** to *initiate the Search*. Clear the filtering fields by clicking the **Clear Search button**.

Image: The two Search By fields



2. The data in each column has an ascending/descending sort feature that sorts alphabetically or numerically. Click the **column header** of choice to cause the table display to be organized according to the header selected. Clicking the column header a second time reverses the order of the displayed information. This is a useful tool when searching through a lengthy data table.
3. Notifications that *have not* been read will have a bolded heading in the **Document(s) filed by** column and a closed envelope to the left of the **Notification ID.**
4. Clicking the ***hyperlink*** **Document Title** will open a new browser tab to display the *official* NEF, or *Notice of Electronic Filing*.
   a) The top of the NEF contains case-related information, including **document(s)** filed.
   b) The bottom portion of the NEF indicates the **service requirements** at the time the listed document was submitted. (Future or past submissions may have different service requirements.)
   c) Persons with eFiling accounts being served electronically are listed first on the NEF.
   d) Persons still requiring service by traditional means are listed under the second heading.

Image: The NEF – Notice of Electronic Filing



***** IMPORTANT NOTICE - READ THIS INFORMATION *****
NOTICE OF ELECTRONIC FILING [NEF]

A filing has been submitted to the court RE: 2021CV00286
Judge: Judge NATALIE R HAUPT - Division 845129

Official File Stamp:	02-22-2021 02:30:28 PM
Notification Date:	03-16-2021 10:50:16 AM
Court:	Stark County Common Pleas Court
Case Title:	BANK VS JOHN DOE
Document(s) Submitted:	COMPLAINT - FORECLOSURE PRELIMINARY JUDICIAL REPORT
Filed By:	Jodi Atty German

You may review this filing by clicking on the following link to take you to your cases.

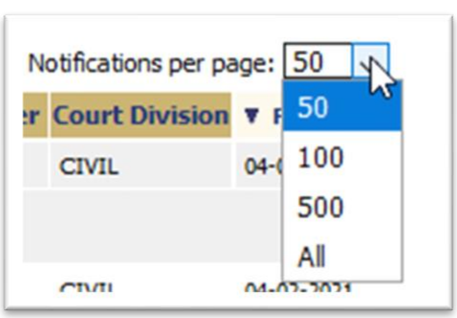
This notice was automatically generated by the courts auto-notification system.

The following people were served electronically:
JODI ATTY GERMAN for BANK

The following people have not been served electronically by the Court. Therefore, they must be served by traditional means:
JOHN DOE
Address: JOHN DOE
44556 MAIN ST
CANTON, OH 44444

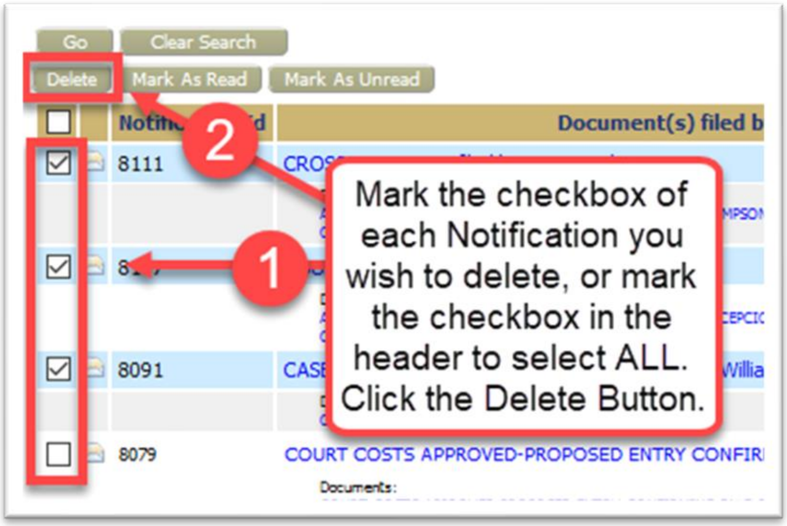
5. Notifications that *have* been read will have an unbolded title with an opened envelope.
6. Users may use the buttons **Mark as Read** and **Mark as Unread** to manually change the display of the envelope.
7. To view the document(s) within the filing, click the ***hyperlink document title*** listed under the **NEF title** in the **Documents(s) filed by column**. The time-stamped document will display as a pdf.
8. The number of notifications shown per page can be adjusted by selecting another menu option from the **Notifications per page** drop-down field. It is located on the right above the Data Table.

Image: The Notifications per Page field



9. The system is coded to auto-clean the notifications after a set period of time as determined by the court. Users can manually clean the page by using the checkbox in combination with the delete button.

Image: Manually Deleting Notifications



Tabs on the Menu Bar

Image: The eFile Tab and its Drop-Down Menu

The selections available to the Filer under the **efile Tab** are:

<u>**NEW CASE**</u> – Selecting **New Case** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **New Case button** on the **Home Page**. It directs the user through the process of selecting Court, Division, Case Category, Case Type, Case Initiation, Adding Parties, Adding Documents and ending with the Review & Submit Page before sending the case initiation filing to the court. Because the Menu Bar is available on every page, it is not necessary to return to the **Home Page** to click the **New Case Button**.

EXISTING CASE - Selecting **Existing Case** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **Existing Cases button** on the **Home Page**. It directs the user to the **Cases page**, where they can choose to efile, view a Case History, or view the current Service List which identifies which case parties will receive an NEF and which ones must be notified by a traditional method of service.

MY FILINGS - Selecting **My Filings** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **MY FILINGS Button on the Home Page.** It directs the user to the **My Filings page** where they can get an overview of all their filings. This includes checking the current status of their filings, viewing and printing the court-stamped documents that were submitted with their filings, and viewing and printing the **Confirmation of Receipt**.

DRAFT FILINGS - Selecting **Draft Filings** from the drop-down menu under the **eFile Tab** takes the user to the same page as if they had clicked the **Draft Filings Button** on the **Home Page**. It directs the user to the **Draft Filings page** where a table of partially completed filings may be viewed. To proceed with any one of them, click the *hyperlink Description* and it will direct you to the **Add a Document page.** If edits need to be made on the **Case Initiation page**, press the **Back** button to be directed there. Continue with the usual steps for filing to a new or existing case and submit the filing to the court.

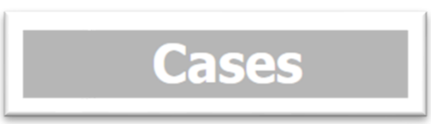
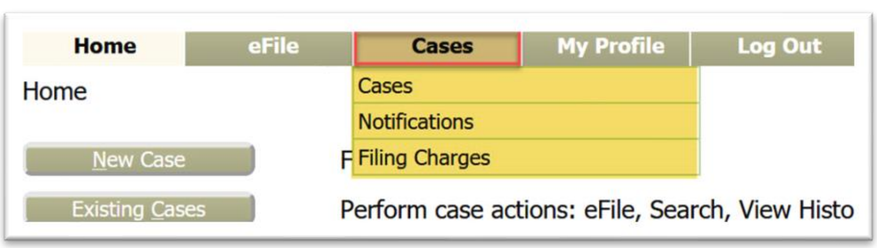


Image 38: The Cases Tab and its Drop-down Menu



The selections available to the Filer under the **Cases Tab** are:

CASES – Selecting **Cases** from the drop-down menu under the **Cases Tab** takes the user to the same page as if they had clicked the **Existing Cases Button** on the **Home Page**. It directs the user to the **Case page** where a case data table, made up of the user's own cases, can be searched to view individual cases in greater detail. Here they can efile to one of their own cases or any other existing case, view case histories and documents on cases in which they are council of record, or see the service list information associated to one of their cases at the time of the query.

NOTIFICATIONS – Selecting **Notifications** from the drop-down menu under the **Cases Tab** takes the user to the same page as if they had clicked the **Notifications Button** on the **Home Page**. It directs the user to the **Notifications page** where they can view the official **NEF's** received from the court as well as see all the court-stamped documents of filings that any party of their cases have made.

FILING CHARGES – Some documents filed to the court require the payment of fees. The total amount owing will show on the final page before submission (**Review and Submit Filing page**). After submission, the filer is directed to the secure site of PayGov.US, Stark County's third-party payment vendor, to enter their payment information. The eFlex system records the payments and keeps track of payment information going back twelve months.
NOTE: If the filer goes to the court and makes a direct payment to the clerk, these payments will not appear in eFlex.

OVERVIEW OF THE FILING CHARGES PAGE

1. On the **Filing Charges page**, click inside the **date fields** to select a date range from the pop-up calendar. Click **Go.**

Image: Left Side of Filing Charges Data Table

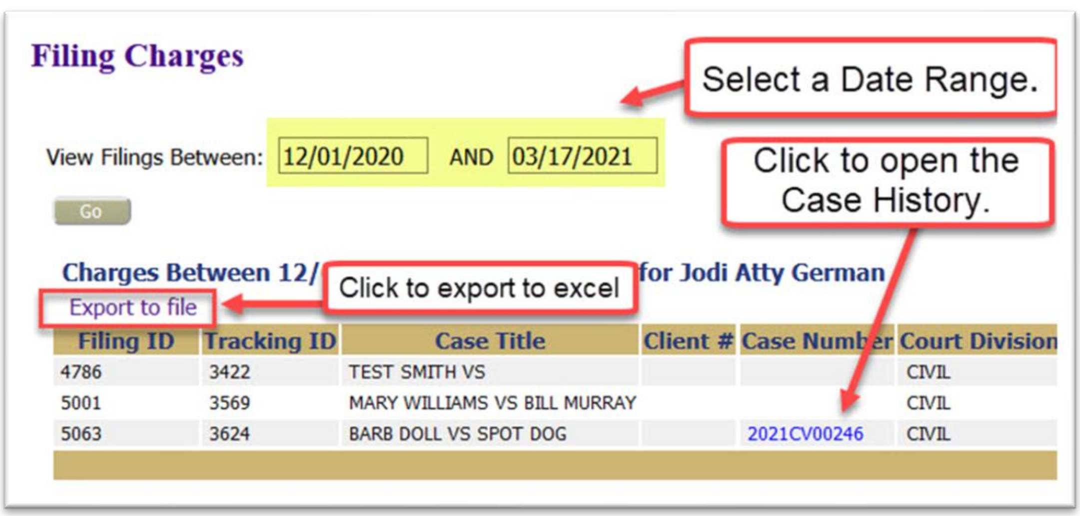


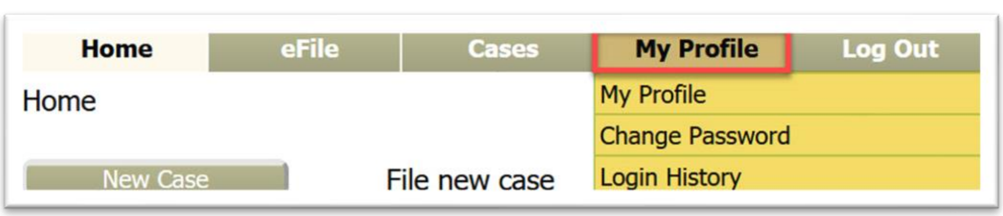
Image: Right Side of Filing Charges data table

Description	▲ Date	Account	Authorization Code	Receipt No.	Court Fees
COMPLAINT	01-26-2021 01:28		6410095		$323.00
COMPLAINT	02-26-2021 03:48		6410114		$323.00
COMPLAINT - FORECLOSURE	03-04-2021 09:32				$590.19
				Total:	$1,236.19

2. The information will display in a data table: Filing ID, Tracking ID, Case Title, Case Number, Court Division, Description, Date, Account, Authorization Code, Receipt No. and Court Fees. Each column in the data table has an **ascending/descending sort feature** by clicking on the column heading and controlling the order of the listings with the up/down arrow. This is a useful tool when searching through a lengthy data table.
3. Another useful tool is clicking the ***Export to file*** hyperlink. The default will allow you to export this to an excel spreadsheet. Other options are available as well.

Image: Export to File

Image: The My Profile Tab and its Drop-down Menu



The selections available to the Filer under the **My Profile Tab** are:

<u>**MY PROFILE -**</u> When you register for an account, you are required to provide profile information, which can be edited or updated later as needed. Periodically you might see a pop-up asking you to verify the current profile info. The default for the pop-up reminder may be every 90 days. This is set by the system

administrator per the court's instructions, so it may be more or less frequent.

OVERVIEW OF THE USER PROFILE PAGE

1. Hover over the **My Profile Tab** and select **My Profile** from the drop-down menu. The **User Profile page** will appear and display the information entered when the user account was created or modified.
2. To change the information in the user profile, click the button **Modify User Profile**. This will direct the user to the **Modify User Profile page**. Fields that display a textbox may be modified.

Image: The Modify User Profile Button

NOTE: It is important that the primary email associated with this account is kept up to date as that is the way the eFlex system communicates with you about activity that has taken place on your cases. If you change your email account and do not record the new email on your user profile, you will no longer receive NEF's (Notifications of Electronic Filing) for your cases.

3. *Optional:* The alternative email addresses are provided so that someone else can receive email notices when you receive courtesy notices on your cases. This may be used for partners or assistants.

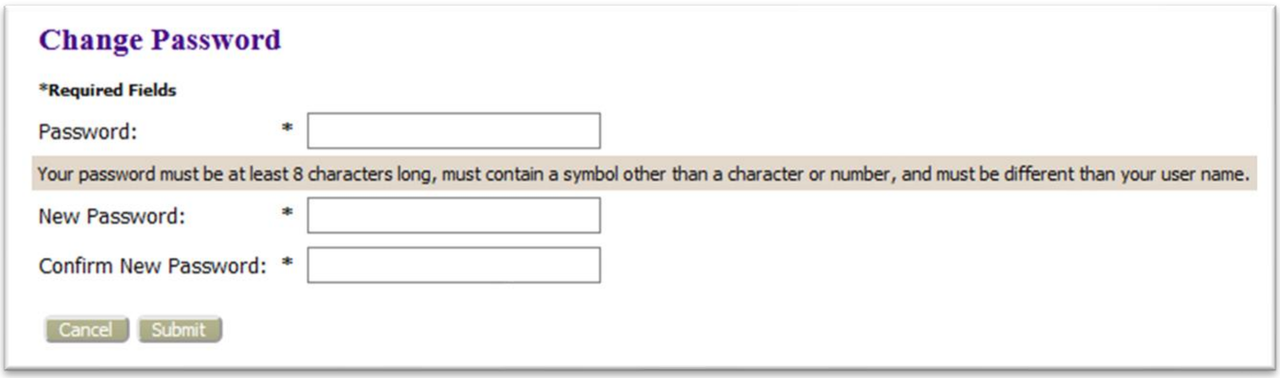
4. Click Submit to save the changes you have made and be returned to the **User Profile page**.

NOTE: If modification needs to be made to information on the **Profile page** that does not appear to be editable, such as the organization to which the user is associated, the user will need to contact the system administrator for assistance.

<u>**CHANGE PASSWORD -**</u> You may change your password whenever desired. Periodically changing of your account password is a wise security measure. We

recommend that your password be something that you can remember, but is difficult for others to figure out. A strong password has symbols, upper and lower case characters, and numbers. Passwords are case sensitive.

Image: The Change Password Fields



STEPS ON THE CHANGE PASSWORD PAGE

1. Hover over the **My Profile Tab** and select **Change Password** from the drop-down menu.
2. Enter the temporary password in the **Password field**.
3. Create a new password following the password requirements and type it into the **New Password field.**
4. In the **Confirm New Password field**, re-type the password exactly as you entered it in step 3.
5. Click **Submit** to save your changes.
6. Be sure you notify your legal assistant, or any others who may enter your filings for you, of the change to your password.

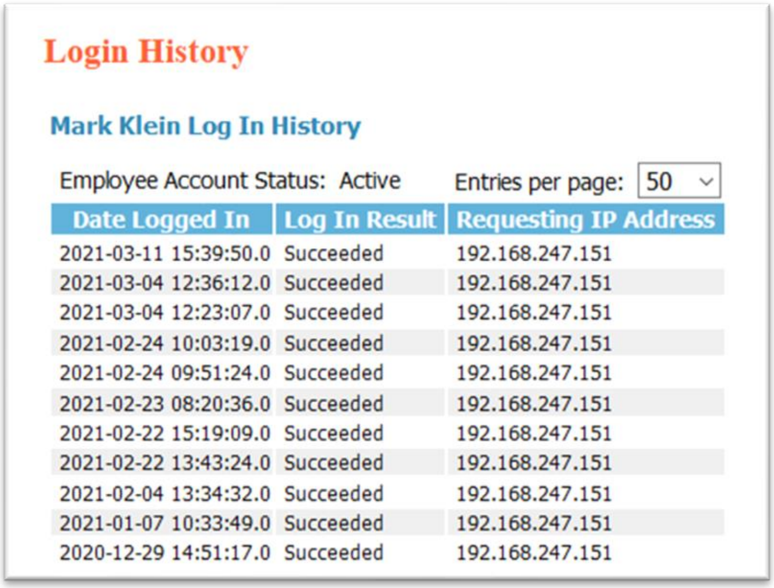
NOTE: When you are changing your password using the **Forgot My Password feature** on the log-in page, make sure in the first password field that you type the *new temporary password* given to you in the email. Don't try to remember your old password because that information no longer applies.

LOGIN HISTORY - The **Login History screen** shows your login failures. Its purpose is to help you monitor any unauthorized login attempts. If your account has too many login failures, the system will automatically suspend your account. If this occurs, call the support helpline to reset your password. Changing your password on a regular basis is one way to help avoid unauthorized access to your account.

STEPS ON THE LOGIN HISTORY PAGE

1. Hover over the **My Profile Tab** and select **Login History** from the drop-down menu.
2. The **Login History page** appears displaying a list of the login attempts along with the date, login result, and IP address of the requesting machine.

Image: The Login History Page



Login History

Mark Klein Log In History

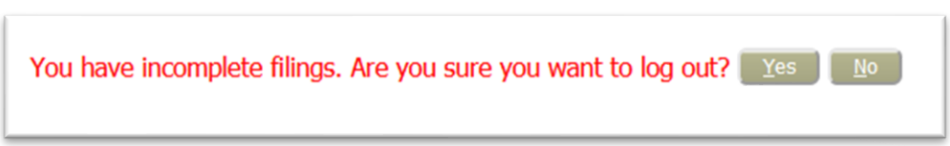
Employee Account Status: Active | Entries per page: 50

Date Logged In	Log In Result	Requesting IP Address
2021-03-11 15:39:50.0	Succeeded	192.168.247.151
2021-03-04 12:36:12.0	Succeeded	192.168.247.151
2021-03-04 12:23:07.0	Succeeded	192.168.247.151
2021-02-24 10:03:19.0	Succeeded	192.168.247.151
2021-02-24 09:51:24.0	Succeeded	192.168.247.151
2021-02-23 08:20:36.0	Succeeded	192.168.247.151
2021-02-22 15:19:09.0	Succeeded	192.168.247.151
2021-02-22 13:43:24.0	Succeeded	192.168.247.151
2021-02-04 13:34:32.0	Succeeded	192.168.247.151
2021-01-07 10:33:49.0	Succeeded	192.168.247.151
2020-12-29 14:51:17.0	Succeeded	192.168.247.151

Image: The Log Out Tab

1. To log out and terminate the current session to the server, click **Log Out** on the M**enu Bar**.
2. A red text message will appear if you have incomplete filings and ask if you are sure of this action.

Image: Warning Message to the Filer



3. Review the list of incomplete filings that have yet to be submitted to the court. These filings include those the Filer purposely postponed by clicking the **Move to Draft button** as well as any the system automatically added. (The eFlex system automatically executes a save action on incomplete filings when a user selects **Logout**.) The information entered will be saved in draft form and accessible for completion on

subsequent logins. To retrieve the **Draft** later, hover over the **eFile tab** and select **Draft Filings**. Click the ***hyperlink Description*** to proceed with its filing.