### Add Attorneys to Your Account

Click the **Settings** tab in the top menu.

- 1. Select **Manage Users** from the left menu.
- 2. Click the **Add Attorney** link from the **Add New Users** box on the right.
- 3. Enter Attorney Information. You have the option to make the attorney a User/Filer, a Firm Administrator, and/or a Service Contact.
- 4. Click **Save**. The new attorney will be sent an activation email with their new account information.

# Add Support Staff

Click the **Settings** tab in the top menu.

- 1. Select **Manage Users** from the left menu.
- 2. Click the **Add Support Staff** link from the **Add New Users** box on the right.
- Enter Support Staff Information. You have the option to make them a Firm Administrator and/or a Service Contact.
- 4. Click **Save**. The new user will be sent an activation email with their new account information.

# Add Payment Type

Click the **Settings** tab in the top menu.

- 1. Select **Payment Settings** from the left menu.
- 2. Click Add New Payment Method in the **BOTTOM** eFile State Court section.
- 3. Enter a **Payment Account Nickname**.
- 4. Select a **Payment Account Type**: Credit Card, Waiver, or eCheck.
- Check Make this card available account wide to pay filing fees if a user wants everyone from their firm to have access to it in their filings, then click Continue for the next step.
- 6. Fill out all card info on Tyler's Online Gateway (Toga). Click **Continue** to begin entering the user's **Payment Information**.
- 7. Choose a method of payment.
- 8. Enter Payment information.
- Once the information is saved, users will see a congratulations screen. Click the **Continue** button, and the payment is fully added to the system.
- 10. Back on the main **Payments Setting** screen, users may now see any new Credit Cards, eChecks, and/or Waiver accounts for use.

# Payment Type: Service Fees

For states that have additional services that are not collected through the eFile State payment processor, filers will need to add a payment type for those services.

Click the **Settings** tab in the top menu.

- 1. Select **Payment Settings** from the left menu.
- 2. Click *Add New Payment Method* in the top payment type section.
- 3. Enter a **Payment Account** Nickname.
- 4. Select a **Payment Account Type**: Credit Card or eCheck.
- 5. Check **Make this card available account wide to pay filing fees** if a user wants everyone from their firm to have access to it in their filings, then click **Continue** for the next step.
- 6. Fill out all card info on the payment processor's screen.
- 7. Upon clicking the **Submit** button, the system will return the user back to the main Payments Setting screen.

#### Add a Case to Your Account

Click the **Add a Case** button from the left menu of the **Dashboard** to begin.

- 1. Enter the **Court** and **Case Number** and then click the **Add Case** button.
- 2. If the search fails to find any results, click the **Advanced Case Search** link to perform an advanced case search. Enter the requested information in those fields and then click the **Add/Search** button.

## Initiate a Case

Select Initiate a New Case from the left menu of the Dashboard to begin.

- 1. Choose the court location and case type to file your new case.
- 2. Define, select, and upload the documents that make up your filing.
- 3. Choose a security level, and any needed optional services, for each document.
- 4. Enter the required new case parties listed on your petition/complaint.
- 5. Select all parties you are filing on behalf of.
- 6. Add service contacts (optional) to perform electronic service.
- 7. Select a payment method to pay estimated fees.
- 8. Review your filing and submit it to the court.

### File on an Existing Case

Select File on Existing Case from the left menu of the Dashboard to begin.

- 1. Choose your case or click add a case to retrieve your case from the court's system.
- 2. Define, select, and upload the documents that make up your filing.
- 3. Choose a security level, and any needed optional services, for each document.
- 4. Enter a new case party (optional).
- 5. Select all parties you are filing on behalf of.
- 6. Add/select service contacts to perform electronic service (optional).
- Request courtesy copy delivery (optional) if you would like paper courtesy copies hand delivered to court for an additional fee (currently available in select courts).
- 8. Select a payment method to pay estimated fees.
- 9. Review your filing and submit it to the court.

### **Filing History**

Select **Filing Status** from the left menu of the **Dashboard** to view your filings.

- Locate the **Pagination** buttons on the upper right of the screen to filter through your filings.
- Above the pagination buttons is the **Filter Filings** box where users may enter a filing id, envelope number, or client matter number to refine search results. Additionally, this box allows users to filter the filings by status: draft, pending, accepted, and rejected.
- Click any filing id to return to that specific filing.
- Click any case number in the Case column to bring up that case summary.
- Only the lead documents show in the document columns. To see all documents in the submission, click the filing id to return to the filing.
- Click the **Print** link in the **Actions** column to print a receipt for the accepted filing.