Quick Start Guide

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.
3. 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: eFileCA Courts

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* **eFileCA Courts** section.
3. Enter a **Payment Account Nickname**.
4. Select a **Payment Account Type**: Credit Card, Waiver, or eCheck.
5. Check **Make this card available account wide to pay filing fees** if applicable, 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.
9. 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.

Add Payment: Other CA Courts

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, click the **Advanced Case Search** link and enter the requested information. Then click the **Add/Search** button.

Initiate a Case: eFileCA Courts

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. Request Service of Process (optional) to serve documents directly to parties at their home or place of business.
8. Select a payment method to pay estimated fees.
9. Review your filing and submit it to the court.

Initiate a Case: Other CA Courts

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

1. Choose the court location, case type, and any additional case data (i.e. an incident zip code and/or premise address)
2. Define, select, and upload the documents that make up your filing.
3. Enter the required new case parties listed on your petition/complaint.
4. Select all parties you are filing on behalf of.
5. Add service contacts (optional) to perform electronic service.
6. Request Service of Process (optional) to serve documents directly to parties at their home or place of business.
7. Select a payment method to pay estimated fees.
8. Review your filing and submit it to the court.

Subsequent Filings: eFileCA Courts

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).
7. 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.

Subsequent Filings: Other CA Courts

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. Enter any additional information that the court requires.
4. Add/select service contacts to perform electronic service (optional).
5. 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).
6. Select a payment method to pay estimated fees.
7. Review your filing and submit it to the court.