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 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.
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 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.

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).
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.

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.