



TrueFiling

Quick Reference

Version 1.0

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About TrueFiling Quick Reference

The purpose of this document is to provide a short description of the most commonly used features of the TrueFiling system. Since TrueFiling is an intuitive, web-based system, the intent is that this short manual will provide many users with enough information to use the system productively, and save the time associated with reading one of the more detailed documents.

What is TrueFiling?

TrueFiling is a Web-based eFiling and service solution for attorneys and self-represented (pro per) filers. TrueFiling is found on the Web at www.truefiling.com and allows the filing of documents to a court remotely, through the Web, instead of in person. It expedites justice by reducing paper handling and travel time and improves the court's internal processes through electronic workflow. The solution can be configured to support any types of cases, however the supported case types are defined by the court (see "Obtaining Additional Information" at the end of this document for more details about supported case types).

Related Documents

The following related TrueFiling documents exist. To view these documents you must first login to the TrueFiling site.

- TrueFiling User Guide
- TrueFiling Admin Guide

Quick Reference

Username and Logging in

To use the TrueFiling system, you need first to create a Username and password. Go to the www.truefiling.com login page, and click the “New User” link and follow the instructions.

What Courts are Supported?

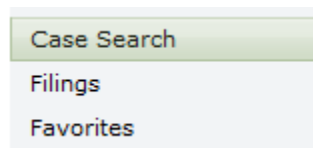
Only specific courts are supported by the TrueFiling system. To determine if a court is supported see “Obtaining Additional Information” at the end of this document. New courts are being added all the time so check back often.

Preparing a Filing to an Existing Case

Once logged in, the fundamental purpose of the system is to file documents that are on your local computer to a court case.

You can file in 2 ways: 1) To an existing case, or 2) Open a new case. This section discusses filing documents **to an existing court case**:

1. Select the “Case Search” link from the list in the left-side menu



2. Select the Court from your list of Favorites in the pull-down menu (Note: use the “Court Lookup” button to change your Favorite Courts)
3. Perform a search for the case by entering values in either the “Case Search” and/or the date fields and press the “Search” button. The “Case Search” field searches against both the case number and the court-assigned case description. The “Case Search” field is quite flexible, and will let you enter a partial or whole value, for example entering “DM” will find any case with these characters in either the case number or case description.
4. Once a case is found, select the case by clicking on the case number in the search result list
5. You will now see some details about the case. TrueFiling requires that you assign each filing to an attorney (the attorney could be yourself or another member of your firm). Click on the “Add Attorney” link to select an attorney for the filing.



6. Once an attorney is selected you can create the filing bundle by selecting the “Add New Filing” link



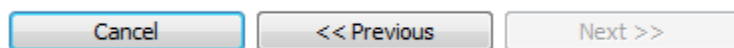
7. This begins the New Filing Wizard, as described below.

New Filing Wizard

The New Filing Wizard steps the user through the 5-step process of creating a filing. At each step the user is provided with guidance on what actions to take. The step you are currently at is highlighted in dark blue at the top of the page:



The user traverses forward and backward through the wizard using the buttons at the bottom:



IMPORTANT: Creating a filing within the wizard will not submit the filing to the court. Nothing will be actually filed to the court until after the user traverses all the way through the 5-step process presses “Finish” and then “Submits” the filing on a separate page. TrueFiling allows you the freedom to build a filing, and make multiple changes or cancel the filing prior to submittal. You can even log on and off the system and the unsubmitted filing will be preserved between sessions (Note: if you start the new filing wizard and don’t press “Finish” any changes made in that wizard session will not be saved).

The 5-Steps of the wizard are described below.

1. **Create or Select Existing Bundle** – This page allows the user to enter the new bundle name, or select an existing “in-progress” bundle. The wizard gives the user the option of creating personalized names for the Bundle and the Filings within the bundle, or the user can simply let the system default the name using current date-time.
2. **Click one of the filing types listed below** – This page show the user all the possible filing types based on the type of case selected, along with the corresponding court fees associated with the filing. The user selects one of the filing types to continue. When the user selects the filing type the system will display court-specific information about the filing. This information is provided by the court as-is, and should not be interpreted as legal advice.
3. **Click the attorney responsible for this filing** – You must select the attorney responsible for the filing by selecting the name of the attorney from the list of available attorneys.
4. **Upload documents associated with this filing** – This page allows you to select the files from your computer to upload (Note: you may want to review the section below

entitled “What Can I File” to become familiar with the terminology). Start by selecting the Primary File by entering the full path name of the file in the Primary File field, or press the “Browse” button to select a file from your computer. Once a file is selected you must press the “Upload” button to load the file to the TrueFiling site. Once the Primary File is uploaded it will appear on the page, and you will be able to upload any attachments. Note: the system supports any number of attachments.

- 5. Choose the servicing type and recipients** – For certain types of filings the court may require the filer to serve (deliver the document) to other case parties. TrueFiling provides an electronic mechanism for performing service called eService. Some courts require eService as a mandatory step and some courts allow the user to perform manual service. This page allows the user to select to eServe the filed documents to parties associated with the case. Note: pressing “Finish” at this step will not file the document or perform service. The user must affirmatively “Submit” the filing on another page. So if you need to add another recipient or make other changes, go ahead and “Finish” the wizard to save your work, and then you can make changes prior to submittal.

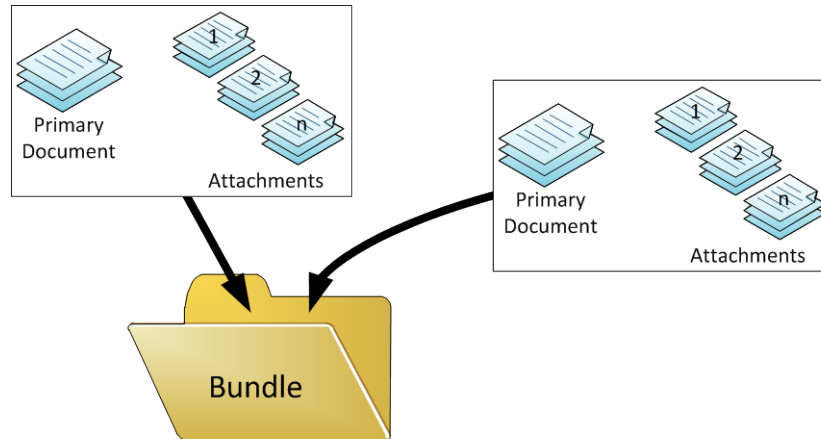
Once the “Finish” button is pressed in step 5 of the wizard the filing is in an “In Progress” state (see Checking the Status of Filings below). As stated previously, the filing has not been submitted to the court, nor has it been eServed to the parties. In this state the user is free to make additional changes or to cancel the filing altogether.

Preparing a Filing to Open a New Case

None of the courts using TrueFiling currently support initiation of a new case. This feature is coming in a future release.

What Can I File

TrueFiling allows you to file document from your computer. A filing can consist of multiple computer files grouped into a bundle as illustrated below. Each bundle consists of one or more filings, and each filing consists of a Primary File and optional attachments.



A bundle is a TrueFiling concept that allows multiple filings to be grouped together. A bundle can be thought of as an electronic folder. A bundle is required whether you're filing a single document or multiple documents. The computer files (primary document or attachments) can be in any of the following formats:

- MS Word
- PDF
- Text
- TIFF
- JPG
- PNG

Submitting a Filing and Paying Fees

Once one or more filings have been prepared, as described above, the filing are in an "In Progress" state. This state means that the filing(s) have not yet been submitted to the court and they have not been eServed to any of the parties. To submit the filing to the court the user must go to the Filing Submit page and press the Submit button. You'll know this screen because it shows the fee window in the upper right corner, similar to what is shown below:

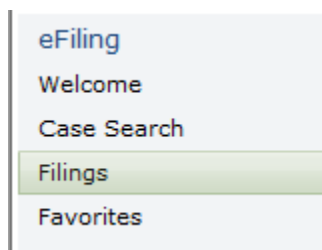
Fees	Add'l Fees	Total
\$300.00	\$18.00	\$318.00
Payment Account	<input type="text" value="Visa 1 - [4111**11]"/>	
Tom Cardholder	10/2012	
<input type="button" value="Submit"/>		

The Filing Submit page will automatically appear after step 5 of the new filing wizard. You can also display the Filing Submit page by clicking on the bundle name while in the Filing Status page, which is described below.

During submission the filer is required to enter a method of payment. The methods of payment are credit card accounts which are stored in the system for the firm. You can add a new credit card account to your firm by selecting the “Accounts” option from the left-side menu.

Checking the Status of Filing Bundles

The Filing Status page provides a list of all the filings that are currently in the system for your firm. This is a great place to get a big picture of everything that has either been filed, or is “In Progress” and waiting to be filed. You can get to the Filing Status page by selecting the “Filings” link from the left-side menu, as shown below:



Bundles shown in the Filing Status page can be in one of three states:





1. **In Progress** – bundles which have not been submitted to the court. You can make changes to these bundles.
2. **Submitted Filings** – bundles which have been submitted to the court, but which have not received a reply. Note: normally a filing will be responded to within 1 business day. If a filing has not received a response in this timeframe, please contact the court. Bundles in this state cannot be changed.
3. **Filed** – bundles which have been submitted to the court and have been accepted by the court. Look at the transaction history to see details and the final filed document. Bundles in this state cannot be changed.
4. **Rejected Filings** – bundles which have been rejected by the court. Look at the transaction history to see details on why the bundle was rejected.

Documents that are bundled and filed to the court undergo a conversion to PDF so that they can be accepted by the court. The following important excerpt is taken from the user’s agreement which is accepted during the enrollment process. Please read carefully.

IMPORTANT: IN ALL CASES YOUR DOCUMENT IS NOT OFFICIALLY FILED WITH THE RECEIVING ENTITY UNTIL YOU RECEIVE CONFIRMATION ALONG WITH A RETURN COPY OF THE FILED DOCUMENT AND UNTIL ANY RELATED PAYMENTS ARE RECEIVED AND ACCEPTED. BECAUSE THE UPLOADED FILE UNDERWENT A CONVERSION FROM ITS ORIGINAL FORMAT, AND CONVERSIONS ARE NOT GUARANTEED TO BE 100% ACCURATE, IT IS YOUR RESPONSIBILITY TO REVIEW THE RETURNED COPY OF THE FILED DOCUMENT TO ENSURE COMPLETENESS AND ACCURACY. IF THERE IS AN ISSUE WITH THE RETURN COPY, PLEASE CONTACT THE RECEIVING ENTITY IMMEDIATELY TO IDENTIFY THE ISSUE.

You can check the detailed status of a bundle by clicking on the Filing ID (bundle name) from the Filing Status page. A Bundle Status page will appear that provides a lot of detail about the bundle, including a detailed transaction history, similar to what is shown below:

Transaction History

Timestamp	Status	Comments	
 8/3/2011 12:29:13 AM	Filed	Manager 8/3/2011 12:29:11 AM : Payment received. Filing officially accepted and filed.	Respond
 8/3/2011 12:28:50 AM	Paid	Payment Accepted. Receipt Number: 0d723b5e-7af3-4e0c-8675-932962a0685c	
 8/3/2011 12:28:44 AM	Accepted	Manager 8/3/2011 12:28:42 AM : Document conditionally accepted pending payment.	Respond
 8/3/2011 12:10:03 AM	In Progress	Received record at 12:10 AM on 8/3/2011.	

You can see in the history many things, such as when it was submitted, and when it was accepted. The paperclip icon shown on the left allows the user to view the completed court filing. This is the official filing, and must be checked carefully after confirmation to ensure accuracy. Note: some courts allow the filer to submit a text response to the court by clicking the “respond” link (shown above). This link allows for a short text message to be submitted to the court.

Obtaining Additional Information

The best source for questions related to the TrueFiling system is to start with the court you wish to file to. If you already have a Username for the TrueFiling website then login at www.truefiling.com and select the “About” link from the left-side menu. This will provide you with a list of contacts for the courts which you have identified as “Favorites”.

If you do not have a Username for TrueFiling, or have forgotten your password then you can find a list of the court contacts by going to the TrueFiling login page (www.truefiling.com) and selecting the “New User” link.

You may also e-mail a question to support@truefiling.com .