

# TrueFiling 3.0 Quick Start Guide

As TrueFiling 3.0's release approaches, we want your transition from TrueFiling 2.5 to be as seamless as possible. We've developed this Quick Start Guide so you'll feel confident the moment you access TrueFiling 3.0. We've detailed some fundamental changes in how TrueFiling functions, as well as some critical user interface (UI) changes.

## Connections Instead of the TrueFiling Law Firm

In TrueFiling 3.0, we've eliminated the TrueFiling Law Firm; instead, you'll make connections.

You'll ask fellow TrueFiling login users in your firm to become connections. Once they accept your connection request, they can file on your behalf and access your filing history. Similarly, you'll be able to file on their behalf and access their history.

When you transition to TrueFiling 3.0, you and all login users in your firm will automatically become connections. Your connection network will be ready to go.

Another important change is a filer must now be a TrueFiling login user. If you intend to file on behalf of an attorney, that attorney MUST be a registered TrueFiling user.

As a result, before we transition to TrueFiling 3.0, you should ensure that any firm attorney on whose behalf you plan to file is a TrueFiling login user.

### Ensure Potential Connections are Already TrueFiling Login Users

1. Log in to TrueFiling 2.5.
2. In the navigation pane under **Settings**, select **Contacts & Attorneys**.
3. Locate the attorney you plan to file on behalf of.
4. If the attorney is a login user, their placard will show the Login User identifier.

A contact or attorney that has the Admin identifier is, by default, a login user.

If the attorney isn't a login user, contact your firm's TrueFiling administrator and ask them to grant the attorney login rights.

## User Roles

When you sign up for TrueFiling, you'll specify your user role - Attorney, Court Reporter, or Pro Se filer.

If you don't select a role, you can only file documents on behalf of others. In addition, you'll be able to file on behalf of another TrueFiling user ONLY if you are connected to that user.

You can update your user role.

1. Select **Settings** under Main Pages in the navigation pane.
2. Expand the **My Information** pane and scroll down to the **Manage Roles** section.
  - If you select **Court Reporter**, you must input your Reporter Number.
  - If you select **Attorney**, you'll input your Attorney / Bar number and the state in which you're licensed. You can specify more than one state and bar number.

## Uploading Filings

In TrueFiling 3.0, uploading documents and filing to a case is simple and intuitive.

1. Select **File** in the navigation pane.
2. Select the **Court** and then select **File to an Existing Case**.
3. Search for and select your case and then select **File to this Case**.
4. Select the **Filer**.

An important change in TrueFiling 3.0 is that the filer MUST be a TrueFiling login user. If you plan to file on another person's behalf, that person must be a registered TrueFiling user.

5. Select your **Filing** and **Service** options.
6. Upload your filing. You can either:
  - a. Click the **Upload** box and then select the document to upload, **OR**
  - b. From File Explorer, drag and drop the document in the box.
7. Select the **Filing Type**.

To add a note or a filing attribute (Sealed, Priority, Confidential), click **Edit**.

Filing Name	File Size	Filing Type	Upload Status	Fee
Motton-Pre-Judgment.pdf	33.79 KB	Motton, Pre-Judgment	✓	\$25.00

8. Continue to upload your documents.
9. If you choose to serve, select the recipients and select the service type. (See [Service Recipients](#) on the following page for details on adding recipients.)
10. Submit your filings and specify the payment method to use.

If you don't want to submit right now, click **Save Progress**. You can access the saved filing on the History page (on the Unsubmitted tab) and continue at a later time.

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## Service Recipients

If you checked the **Serve Document** option on the Upload pane, the Service Recipients pane is displayed.

Existing case contacts are listed and can be selected for service.

1. Select the checkbox beside those you want served.
2. Select the **Service Type**. If you select Mail Service, their mailing address is listed.

## Ad Hoc Recipient

You can add a recipient that isn't a TrueFiling user for this filing only.

1. Click the **Add Recipient** button. A new row of fields is displayed.

First / Last Name	Role	Address	Service Type	
Jamison Michaels	Attorney	jamisonmichaelslaw@gmail.com	e-Serve	<input checked="" type="checkbox"/>
Addy Ryan	Attorney	aryan@imgft.com	e-Serve	<input checked="" type="checkbox"/>
Shanna Ryan	Ad hoc	shannaryan@imagesoftnc.com	e-Serve	<input checked="" type="checkbox"/>

2. Input the recipient's name and email address.
3. Select the **Service Type**. If you select Mail Service, input their mailing address.

This person will be served when the filing is submitted to the Court.

## Add a Connection as a Recipient

You can add a connection as a service recipient. They'll also be added as a case contact.

1. In the Service Recipients pane, click **Add Connected User**.
2. Input their name or email address in the search field. After you've input the first three characters, matching entries are listed.
3. Locate the connection you want to add as a recipient.
4. Select the checkbox.
5. Click **Add Selected**. The selected connection is added as a service recipient for the filing and as a contact for the case.
6. Select the **Service Type**.

## Add Opposing Counsel as a Recipient

If allowed by the Court, you can add opposing counsel as a service recipient. They'll also be added as a case contact.

1. In the Service Recipients section, click **Add Opposing Counsel**.
2. Input their **Name** or **Attorney Number**.

By default, any person registered in TrueFiling (attorney, court reporter, or pro se filer) will be included in the search results. If you want to search only for TrueFiling registered attorneys, select the checkbox beside **Attorneys Only**.

3. Click **Search**.

4. Locate the counsel to add and select the checkbox beside their name.
5. Click **Add Selected**. The counsel is added as a service recipient for this filing and as a contact for the case.
6. Select the **Service Type**.

## Filing History and Properties

The History page details the filing and payment histories of you and your connections.

Filing Name	Filing Type	Filer	Court	Case Number	Submission Date	Status
Filed	Motion, Post-Judgment	Amy Ryan (987987)	MI ImageSoft 99th Circuit Court	2014-000129-CM	09/18/2017 at 11:03:26 AM	Filed

To display only your filings, click **My History**. To display your filings and your connections' filings, click **All History**.

For each submitted filing, you can click the **Filing Name** to display a pane that lists:

- Its filing properties  
You can click the Case Number to launch the Case Details page, which lists the case contacts and submitted filings.
- Who's been served and if they've accessed the document
- The filing's status with regard to the Court

On the History page, you can also download the original and stamped copies of the filings, as well as any Proofs of Service and payment receipts.

To view a list of your saved filings, click the **Unsubmitted** tab. Select the **Filing Name** to return to the saved filing on the Upload pane.