

Transition to 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 create a connection network.

You'll ask fellow other TrueFiling users in your firm to become connections. Once they accept your connection request, they can file on each other's behalf, access each other's filing and payment histories, and use any shared payment accounts.

When you transition to TrueFiling 3.0, you and current 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 user. If you plan to file on behalf of an attorney, that attorney MUST be a registered TrueFiling user.

As a result, before you transition to TrueFiling 3.0, ensure 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'll be able to file documents only on behalf of other TrueFiling users in your connection network.

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 must select the state or province in which you're licensed as well as your Attorney / 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 registered TrueFiling user. If you plan to file on another person's behalf, that person must be a registered TrueFiling user, and they must be a connection.

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 or Confidential), click **Edit**.

Filing Name	File Size	Filing Type	Upload Status	Fee
Motion-Pre-Judgment	33.78 KB	Motion, Pre-Judgment - \$25.00	✓	\$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 later.

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Service Recipients

If you checked the **Serve Document** option on the File 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, a 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.

Name	Roles	Status	Email	Service Type	<input type="checkbox"/>
Addy Ryan	Pro Se Attorney (MI) (987987)	Standard	aryan@imgsoft.com	e-Serve	<input checked="" type="checkbox"/>
Andrew Ryan	Attorney (MI) (987654)	Standard	aryan@imgsoftinc.com	e-Serve	<input type="checkbox"/>
Libby Ryan	Attorney (MI) (987987)	Standard	jamesonmichaelslaw+MI@gmail.com	e-Serve	<input type="checkbox"/>
Shanna Ryan	Ad Hoc		shannaryan@imgsoftinc.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 Yourself or a Connection as a Recipient

You can add yourself or a connection as a service recipient.

1. In the Service Recipients pane, click **Add Myself / Connected User**.
2. Input their name or email address in the search field.
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.
6. Select the **Service Type**.

Once you submit your filings, they'll be added as a case contact.

Add Opposing Counsel as a Recipient

If allowed by the Court, you can add opposing counsel as a service recipient.

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

By default, any person registered in TrueFiling (attorney, court reporter, or pro se filer) will be included in the search results. To search only for registered TrueFiling 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.
6. Select the **Service Type**.

Once you submit your filings, they'll be added as a case contact

Filing History and Properties

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

Filing Name	Filing Type	Matter Number	Filer	Submitter	Court	Case Number	Submission Date	Status
Motion-Pre Judgment	Motion, Pre-Judgment	Libby Ryan (987987)	Addy Ryan	MI ImageSoft 99th Circuit Court	2014-000129-DM	11/30/2018 at 09:37:59 AM	Filed	

Status	Date	Comments
Filed	11/30/2018 09:59:24 AM	The simulator has filed this document at 11/30/2018 9:59:21 AM.
Paid	11/30/2018 09:58:57 AM	INFO: Payment Accepted. Order Id: 4b51c9c3-b02-4653-b5f2-06190b189c84, Tracking Id: e3054376-a6c1-4653-b4e9-21032bcc87a4. Original Filing Id: 2cd0a51c-1b4f-4683-b996-52f7b66cab7.
Accepted	11/30/2018 09:58:52 AM	The simulator has tentatively accepted the filing you have submitted, pending payment
In Progress	11/30/2018 09:58:45 AM	Record received by the simulator at 9:58 AM on 11/30/2018
Submitted	11/30/2018 09:57:59 AM	Submitted to the court by Addy Ryan (987987)

To display only your filings, click **My History**. To display your filings and your connections' filings, click **My Network's 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 **Bundle Name** to return to the saved filing on the Upload pane.