Registering as an Independent User

You can register as an "independent user" if you are a single user of the system, meaning a user not associated with any firm or being represented by any firm.

Note: Refer to your local court's website before registering as an independent user, as registration options may vary.

Perform the following steps to register as an independent user:

1. Click the **Register Now** link.

   Note: There is no fee to sign up for e-filing.

2. Select the ⊙ An Independent User option.

3. Click the **Next** button to continue; click the **Previous** button to go back; or click the **Cancel** button to cancel the registration process.

4. Read the **Usage Agreement** before proceeding.

5. Select the ☐ **I Agree** check box to accept and agree to the terms listed on your screen.

6. Click the **Next** button to continue; click the **Previous** button to go back; or click the **Cancel** button to cancel the registration process.

7. Complete the **Contact Information** form.

8. Click the **Next** button to continue; click the **Previous** button to go back; or click the **Cancel** button to cancel the registration process.

9. Complete the **User Information** form.

10. Enter a question in the **Security Question** field.

    Note: Your security question is required to restore your password in case you forget your password.

11. Enter a response in the **Security Answer** field.

12. Click the **Register** button.

    The message **Your Registration is Complete** displays on the screen.

13. Click the **Finish** button.

    Note: You must verify your e-mail address to complete the registration process. A verification e-mail from no-reply@tylerhost.net will be sent to you; open the e-mail and click the link to confirm your e-mail address. If you don't see the e-mail in your inbox, check your junk mail folder for the e-mail.

    Your registration is complete, go to your home page to log in.

1   Registering as a User with an Existing Firm

You can register as a user if your Firm Administrator has already registered with eFileTexas.gov and approved users to self-register.

Note: You must know your firm's name to set up your account. The Firm Administrator may not allow users to self register. If this is the case, the firm's name is not available when searching, and you must contact the Firm Administrator to be registered.
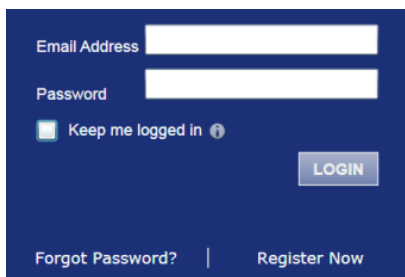

Figure 1.1 – Login Window

Perform the following steps to register as a user in the firm:

1. Click the **Register Now** link on the login screen.

    The **Registration Wizard** opens. **Note: There is no fee to sign up for eFileTexas.gov.**

    Note: Registration options vary by site.

2. Select the **User with an Existing Firm** option.

3. Click the **Next** button to select your firm, or click the **Cancel** button to cancel the registration process.

4. Type your **Firm Name**, or click the **Search** button to view a list of all available firms.

5. Select your firm's name from the list.

6. Click the **Next** button to enter your account information; click the **Previous** button to return to the previous screen; or click the **Cancel** button to cancel the registration process.

    Note: An asterisk (*) indicates required information.

7. Complete the **User Information** form.

8. Enter a simple **Security Question** in the field provided. (Example: What was your high school mascot?)

    Figure 1.2 – Security Question Field

9. Enter a **Security Answer** in the field provided.

    Figure 1.3 – Security Answer Field

Note: Select I am also an Attorney ✓ if you are an attorney, and then enter your attorney number in the field. Attorney number formats vary by site; refer to your court's website for information on how to enter your attorney number.
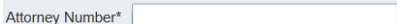

Figure 1.4 – Attorney Number Field

Note: Click the Verify button if prompted. This verifies your attorney number is in the system.

10. Click the **Register** button. eFileTexas.gov displays the **Your Registration is Complete.** message on the screen.

11. Record the login details displayed for your records.

12. Click the **Finish** button.

13. Go to your e-mail inbox to access your registration confirmation e-mail.

    Note: You must verify your e-mail address to complete the registration process. A verification e-mail (from no-reply@tylerhost.net) will be sent to you. Open the e-mail and click the link to confirm your e-mail address. If you don't see the e-mail in your inbox, check your junk mail folder for the e-mail.

    Your registration is now complete. Once you have received your e-mail confirmation, return to the login screen to log in to eFileTexas.gov.

2   Logging into eFileTexas. gov

You can log in by using your e-mail address and password provided during the registration process. You must log in to be able to use eFileTexas.gov.

Note: Click Register Now to register if you have not registered to use eFileTexas.gov.

Perform the following steps to log in:

1. Go to your eFileTexas.gov home page.

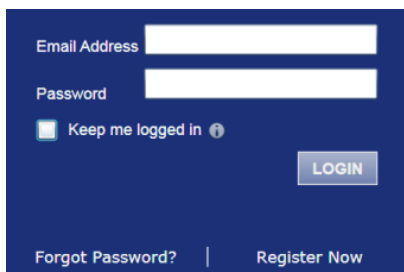2. Enter your e-mail address and password (case-sensitive) in the fields provided.

Figure 2.5 – eFileTexas.gov Login Area

3. Select the check box to stay logged in to eFileTexas.gov. This keeps you logged in to eFileTexas.gov until you click the logout link to logout.

4. Click the **LOGIN** button.

     Note: After several failed attempts to log in to the system, your account is locked. You can unlock your account by using the Forgot Password? option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.

    Once you have successfully logged in, you can begin to use eFileTexas.gov.

3 Case Search

Topics Covered in this Document

♦ Advanced Search
♦ Performing an Advanced Search by Person

Search for a case by selecting a location using the drop-down list, and entering the case number assigned by the courts or by entering the party name in the search field.

Figure 3.6 – Case Search Fields

Advanced Search

The **Advanced Search** feature provides the ability to search by party name using a person or a business name. The **Advanced Search** feature includes the ability to filter a search by party name based on the location or the case type.

Performing an Advanced Search by Person

An asterisk (*) indicates a required field. **Note: Color themes may vary by site.**

Complete the following steps to perform an **Advanced Search** using the **Person** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

    The *Advanced Search* dialog box opens.

Figure 3.7 – Advanced Search Dialog Box

2. Select the **Person** check box.

     Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.

4. Click the **Search** button to continue or the **Cancel** button to cancel. Click the **Reset** button to reset the form.

The search results are displayed.

4 Filing into an Existing Case

You can file into an existing case once you have initiated a case.

The procedures that follow describe the three different ways to access a case to file into the case.

Perform the following steps to access your case to begin a subsequent filing.

1. Click the **WORKSPACE** link at the top of the page.

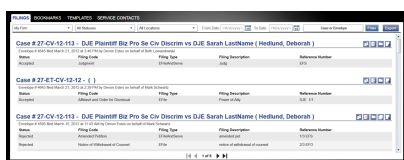   **Note: This will take you to the Filings screen.**

Figure 4.8 – Filing Screen

a. Locate your case on the **Filings** screen.

b. Click the icon to file into the case.

c. Complete the 7 filing details, page 4.

5 Filing a New Case

File a new case using the **Case Information** screen.

A payment account and a filing attorney must be set up prior to filing a new case. Contact your Firm Administrator to set up the accounts prior to starting the filing process.

Perform the following steps to file a new case:

1. Click the **NEW CASE** link.

Figure 5.9 – New Case Link
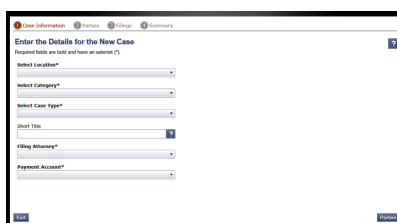
The **Case Information** page opens.

Figure 5.10 – Case Information Page

2. Complete the details for the new case form using the drop-down list.

   Note: An asterisk indicates required fields.

3. Click the **Parties** button to save the case information and continue.

   Note: Once you click the Parties button, a draft of the pages where all of the required fields have been completed is automatically saved. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing a saved draft, click the WORKSPACE link at the top of the page, find your case on the Filings screen, and click the ▶ icon.

6 Entering Party Details
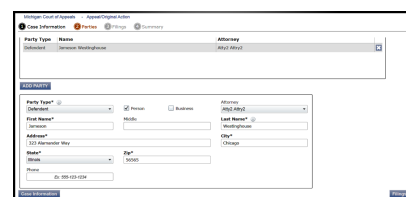
Each case requires a party type.

Figure 6.11 – Parties Page

Note: An asterisk (*) indicates a required field. You are required to complete all required information for the party types in the fields provided.

Perform the following steps to enter the details for the parties involved in the case:

1. Click the **Parties** button from the **Case Information** screen to enter the party details for the case.

2. Choose the party type by selecting either **Plaintiff** or **Defendant** under the **Party Type** column. You can also select the party type using the drop-down menu in the **Party Type** field.

3. Enter the party information in the fields provided.

   If you want to add another party to the filing, click the **ADD PARTY** button, and enter the party information in the required fields.

4. Click the **Filings** button to save the party details, or click the **Case Information** button to return to the previous screen.

7 Entering Filing Details

The **Filing Details** screen allows you to enter the filing details and calculate the fees associated with the filing.
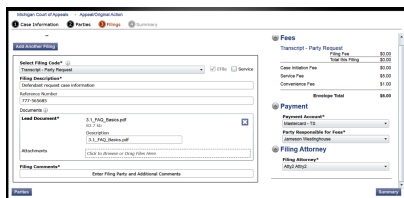

Figure 7.12 – Entering Filing Details Screen

Perform the following steps to enter the filing details for the case:

1. Click the **Filings** button from the **Parties** screen to enter the filing details.

2. Select the filing code using the **Select Filing Code** drop-down menu.

3. Select the **EFfile** check box to select the e-file option.

4. Enter a brief description of the filing associated with the filing code previously selected in the **Filing Description** field.

5. Type a reference number of your choice that you can refer back to for this filing in the **Reference Number** field.

6. Select the **Lead Document** for this filing.

    a. Click *Click to Browse or Drag Files Here* to select a **Lead Document**.

        This opens Windows Explorer on your computer.

    b. Select a document to upload from the files on your computer.

    Note: Only one document can be uploaded as a lead document.

    c. Click **Open** to attach the file.

    d. Wait as the attachment uploads.

    e. Type a description of the uploaded attachment.

    f. Select a security option for the attachment.

    g. To delete the uploaded attachment, click the **X** icon.

7. Select the **Attachments** to upload for this filing.

    a. Click *Click to Browse or Drag Files Here* to select an attachment.

        This opens Windows Explorer on your computer.

    b. Select the attachments to upload from the files on your computer.

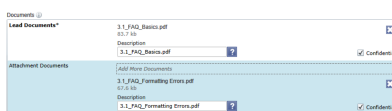   **Note: Multiple documents can be uploaded as attachments simultaneously.**

Figure 7.13 – Uploading an Attachment

    c. Click **Open** to attach the file.

    d. Wait as the attachment uploads.

    e. Type a description of the uploaded attachment.

    f. Select a security option for the attachment.

    g. To delete the uploaded attachment, click **X** located under **Confidential**.

8. Enter the **Filing Comments** for the court reviewer to read.

9. Click the **Add Another Filing** button to add more documents to this envelope.

10. Review the filing **Fees** located on the right side of the screen.

    Note: Your credit card is authorized when submitted; however, the transaction fees will not post to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.

11. Select a payment account to use to pay the filing fees.

12. Select the party responsible for the filing fees.

13. Select a filing attorney.

14. Click the **Summary** button to save the filing details when you are done, or click the **Parties** button to return to the previous screen.

8 Review Envelope and Filing Summary

The **Envelope and Filing Summary** screen displays the information you entered throughout the filing process along with the filing fees and payment information.
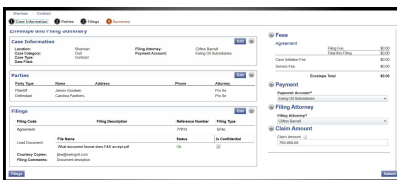

Figure 8.14 – Envelope and Filing Summary Screen

1. Carefully review the information on the screen to ensure all information entered is correct.

2. Click the **Edit** button to change any information on the screen, if needed.

3. Click the **Submit** button when you are done to submit your filing, or click the **Previous** button to return to the previous page.

9 Technical Support

The Technical Support Team is available to assist all users by calling 855.839.3453 Monday through Friday between the hours of 7 a .m. to 9 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an e-mail to efiling.support@tylertech.com or by using the Chat option.

System Requirements:

• Browser Requirements – eFile.TXCourts.gov supports current versions of the Windows operating system using Internet Explorer 7 and above or Firefox. If your browser does not meet these minimum requirements, you will need to upgrade before attempting to use the eFile.TXCourts.gov system.

• Connection Requirements – A high-speed Internet connection is recommended.

• Document Format – ****PDF is the only format allowed for attaching documents when using eFile.TXCourts.gov.****

If you're a new user, you'll first need to Register

To register, click the **Register Now** button

• **Firm Admin** = the designated "gatekeeper" for a group of filers. The Firm Admin can manage other user, attorney, and payment accounts

  • http://www.efiletexas.gov/filers/registering-as-a-firm-admin.htm

• **User with Existing Firm** = someone filing on a firm/attorney's behalf, such as a paralegal

  • http://www.efiletexas.gov/filers/registering-users-into-existing-firm.htm

• **Independent User** = someone not represented by an attorney and filing on their own behalf

  • http://www.efiletexas.gov/filers/registering-as-an-independent-user.htm

To pay for your filings, you'll need to create a Payment Account

1. Go to **FIRM ADMIN**
2. Go to the **Payment Accounts** tab
3. Click the **Add Payment Account** button
4. Name your payment account
5. Select the account type
6. Click the **Enter Credit Card Information** button
7. Then **Save Changes** **Bottom left corner

Forgot your password? Resetting is easy!

1. Click **Forgot Password?**
2. Enter your email address, then **Tab** and click **Next**
3. Answer your security question
4. Check your email
5. Copy the password in your email
6. Paste it into the password field by pressing **Ctrl** on your keyboard then **V**

System Requirements:

• Browser Requirements – eFile.TXCourts.gov supports Firefox for Apple computers. If you use any other browser on your Mac, you will need to download Firefox before attempting to use the eFile.TXCourts.gov system.

• Connection Requirements – A high-speed internet connection is recommended.

• Document Format – **PDF is the only format allowed for attaching documents when using eFile.TXCourts.gov.**

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  • http://www.efiletexas.gov/filers/registering-users-into-existing-firm.htm

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5. Select the account type
6. Click the **Enter Credit Card Information** button
7. Then **Save Changes** **Bottom left corner

Forgot your password? Resetting is easy!

1. Click **Forgot Password?**
2. Enter your email address, then **Tab** and click **Next**
3. Answer your security question
4. Check your email
5. Copy the password in your email
6. Paste it into the password field by pressing **Command** on your keyboard then **V**