E-Filing 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: Green Filing Fees

*Utah filers need to set up a separate payment account for Green Filing's fees by adding a payment type in the box marked **Green Filing Fees**.*

Click the **Settings** tab in the top menu.

1. Select **Payment Settings** from the left menu.
2. Click *Add New Payment Method* in the **GREEN FILING FEES** section.
3. Enter a **Payment Account Nickname**.
4. Select a **Payment Account Type**: Credit Card or eCheck, then click **Continue** for the next step.
5. Fill out all card info on the payment processor's screen.
6. Upon clicking the **Submit** button, the system will return the user back to the main Payments Setting screen.

Add Payment: Utah Court Fees

*Utah filers need to set up a separate payment account for Utah's Court fees by adding a payment type in the box marked **Utah Court Fees**.*

Click the **Settings** tab in the top menu.

1. Select **Payment Settings** from the left menu.
2. Click *Add New Payment Method* in the **UTAH COURT FEES** section.
3. Enter a **Payment Account Nickname** and click **Continue** to be forwarded to Utah's payment processor, *Heartland Payment Services*.
4. Fill out all required information and then click the button marked **Token**.
5. Click the **Continue** button on the Congratulations screen to return to Green Filing.

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. Enter the required new case parties listed on your petition/complaint.
4. Complaint Amount - Enter the amount of the claim, if applicable.
5. Enter any additional information the court may require for your filing type.
6. Select a payment method to pay the court’s fees.
7. 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. Enter any additional information that the court requires.
4. Serve documents by mail (extra fees apply) and/or electronically serve anyone the Court's Notification of Electronic Filing (NEF) does not serve (optional).
5. Select a payment method to pay the court’s fees.
6. 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.