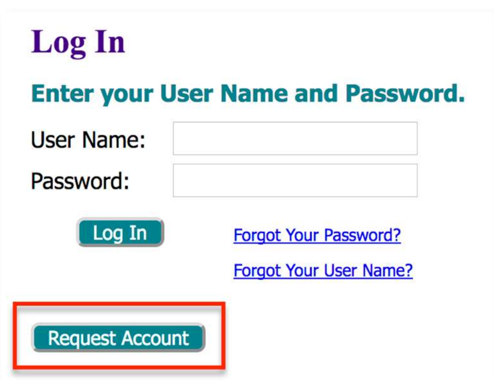
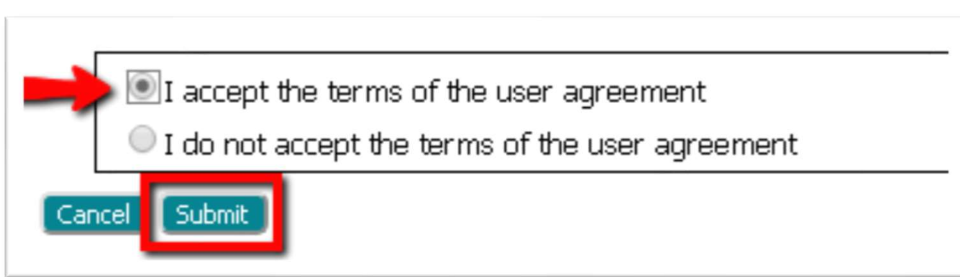
Quick Guide for FILERS

REQUESTING AN ACCOUNT

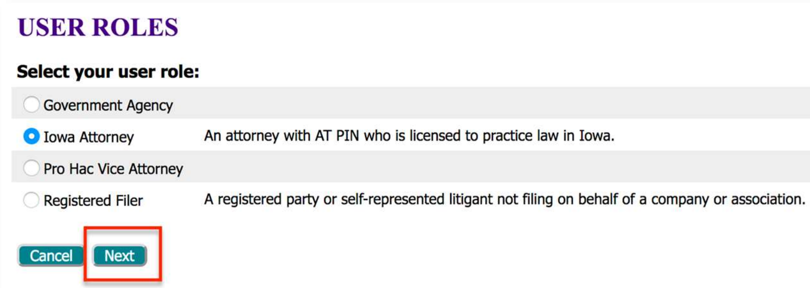
1. Click **Request Account** on 'Login' page.



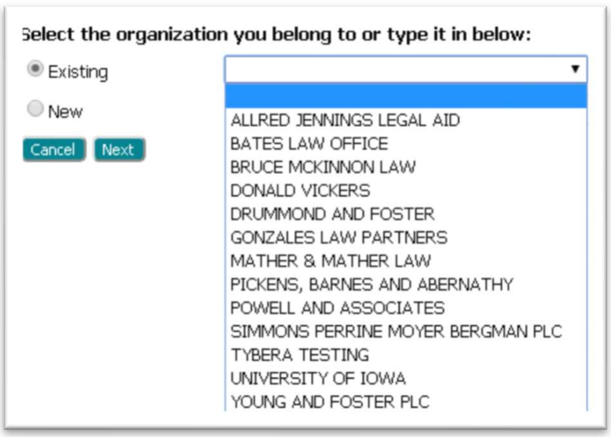
2. Read **User Agreement,** click the radio button **I Accept the terms of the user Agreement**, and click **Submit** button.



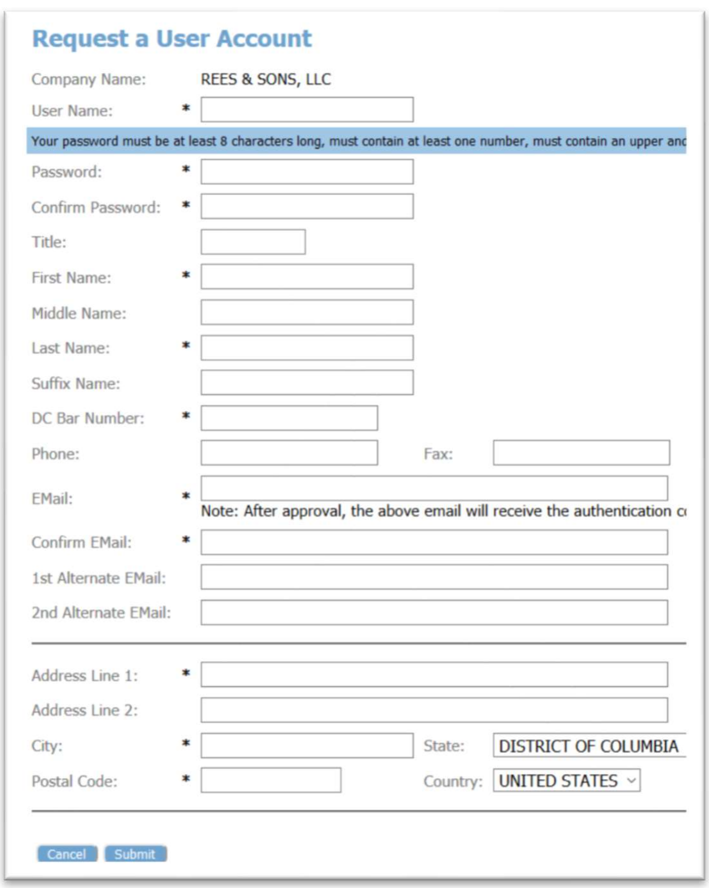
3. Select the appropriate **User Role** and click **Next**.



4. Select the organization you belong to by marking the **Existing** radio button, clicking the down-arrow, and scrolling through the System's current listings.



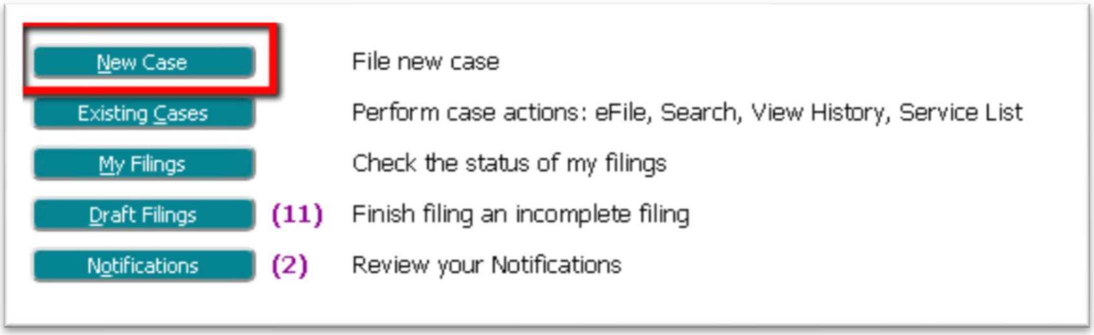
5. If the organization is not listed, click the **New** radio button and type the name in the provided field.
6. On the **Request a User Account page**, fill in the requested information. Fields marked with an asterisk are required. For attorneys, use the assigned Iowa AT pin number in the bar number field.



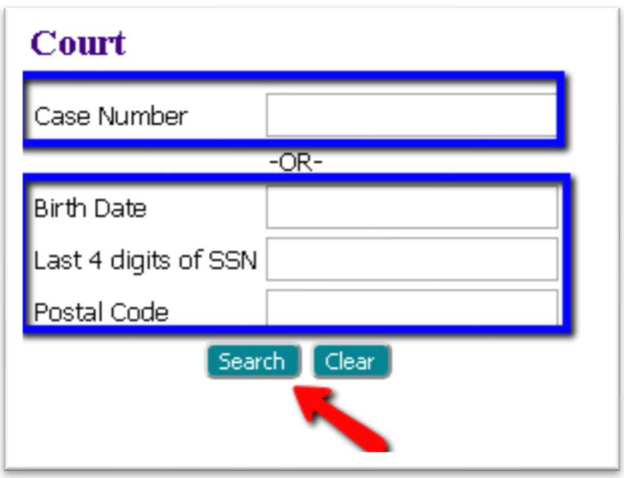
7. Login after you receive notification that your account has been approved.

FILING A NEW CASE

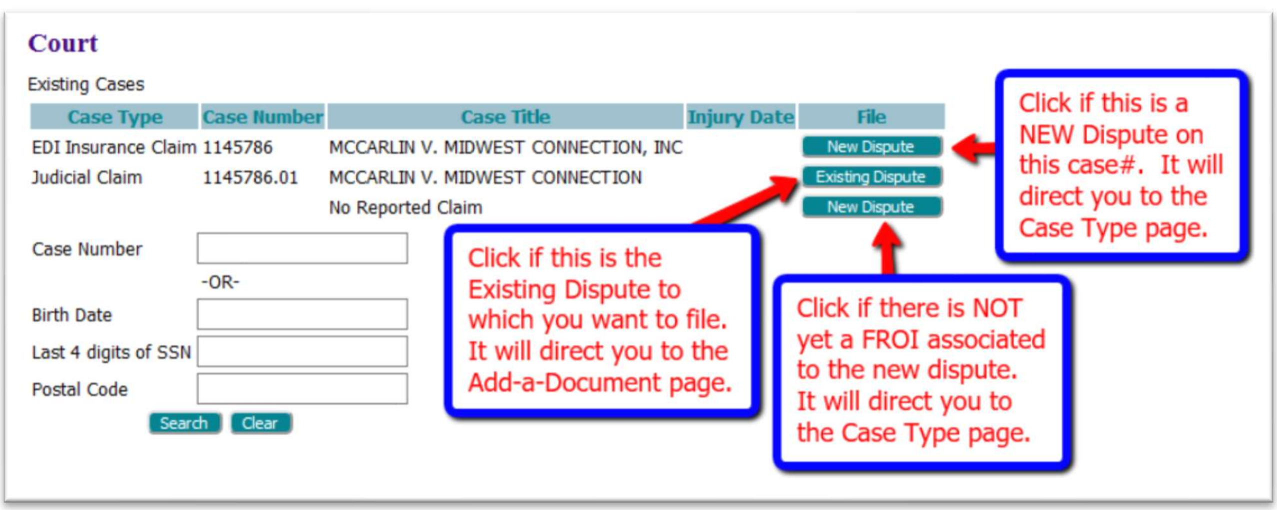
1. On the Home Page, click the **New Case** button.



2. Enter the **Case Number** or fill out at least 2 of the 3 **Party information** fields. Click **Search**.

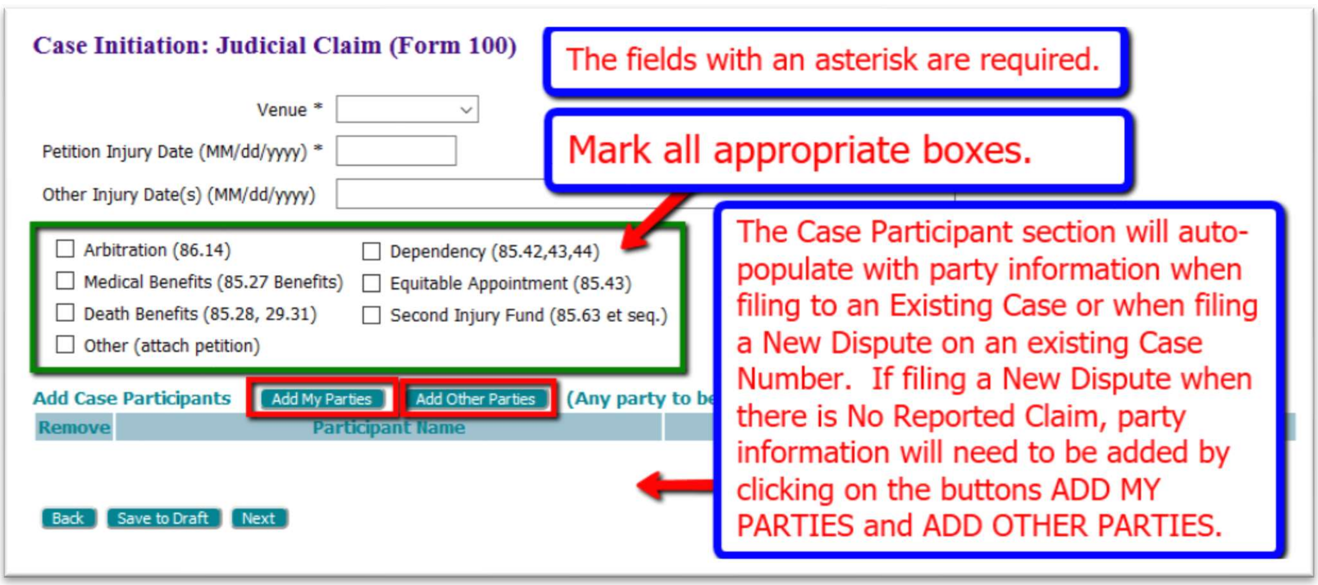


3. Click the appropriate button under the **File column** to continue.



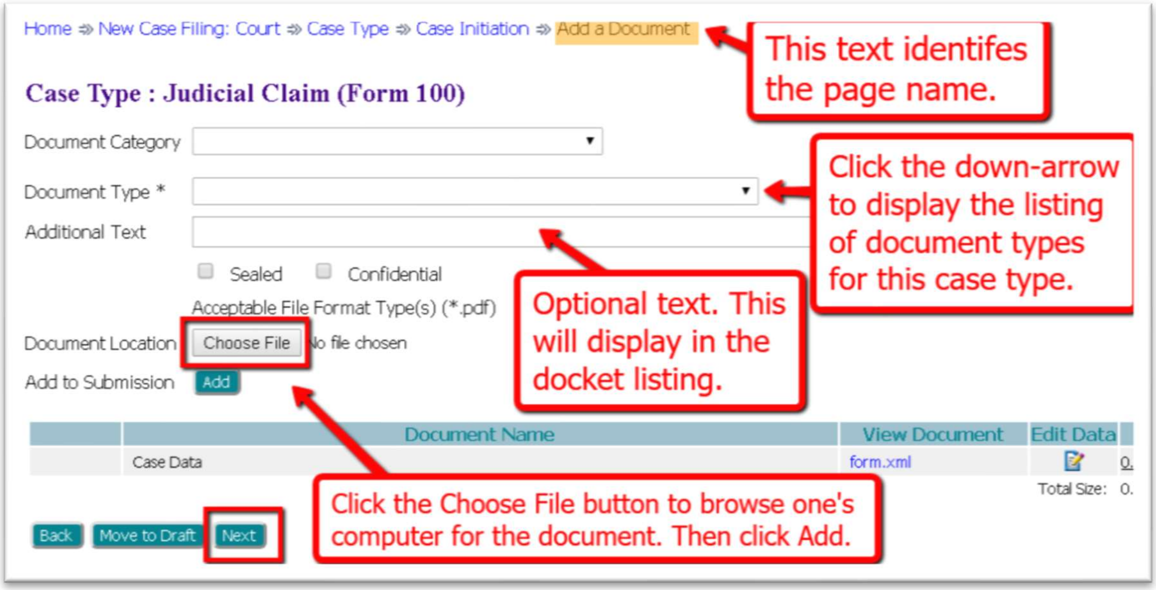
4. If the **NEW DISPUTE** button or **No Reported Claim NEW DISPUTE** button are selected, the user will be directed to the **Case Type page** where the case type of the claim to be filed may be picked. The most common *new dispute filing* is the **Judicial Claim** which contains the initial petition.

5. On the **Case Initiation Page**, fill in the required fields. Only the page for the **Judicial Claim Case Type** will display checkboxes that identify the specific relief that is being sought, as indicated in the petition. Multiple boxes may be marked. Please note that if the checkbox **Arbitration** is selected, a **filing fee** will be charged.



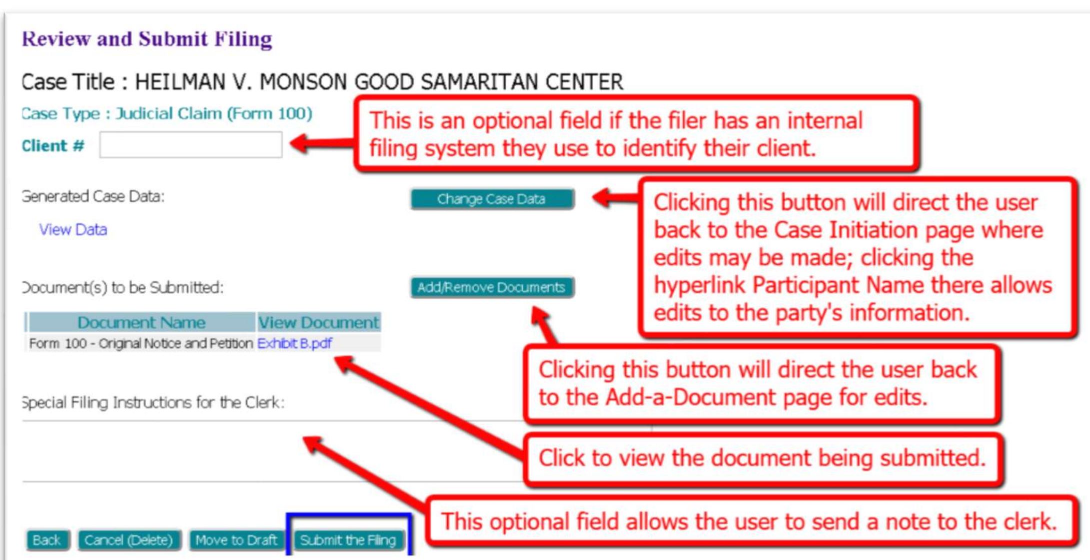
6. The bottom portion of the screen will display case participants. This section will auto-populate when filing either to an **Existing Case** or a **New Dispute** on an Existing case number. This section will be blank if filing a **New Dispute when there is not a previously reported claim**. Subsequently, case participant information will need to be added.
7. To add case participants, first click on the button **Add My Parties**.

8. On the **Add-a-Party page**, fill in the party information fields. Required fields are marked with an asterisk. Click the **Submit button** at the bottom to continue.
9. Click the **Add Other Parties button** to add the defendant information. A section is also available on this page to add the defendant's attorney, if that information is known. Click the **Submit button** at the bottom to continue.
10. When the case participant section is complete, click **Next**.
11. On the **Add-a-Document page**, click the down-arrow in the **Document Type field** to select which document type is being filed. It may be helpful, but not required, to click the down-arrow in the **Document Category field** to filter the search selections that display in the **Document Type field**.



11. If desired, enter additional identifying text in the optional **Additional Text** field. This will display alongside the document type in the docket listing.
12. Click **Choose File** to search one's computer or thumb drive for the needed document. Click **Add**.
13. The selected document will display in the Document table at the bottom of the page. To view the document, click the hyperlink title in the **View Document column**. To delete the document from the filing, click the "X" icon in the **Remove column**.
14. Additional documents may be added to the filing by repeating steps 11 – 14. Be aware that the total submission size of the filing must be less than 30 MB.
15. With all documents added, click **Next**.
16. On the **Review and Submit Filing Page** one may view, add, or remove documents from the filing.
    a. The optional Client # field is a convenience for filers who use an internal filing system.
    b. If desired, add a note for the clerk using the text field provided.
    c. Click the button **Submit the Filing**.

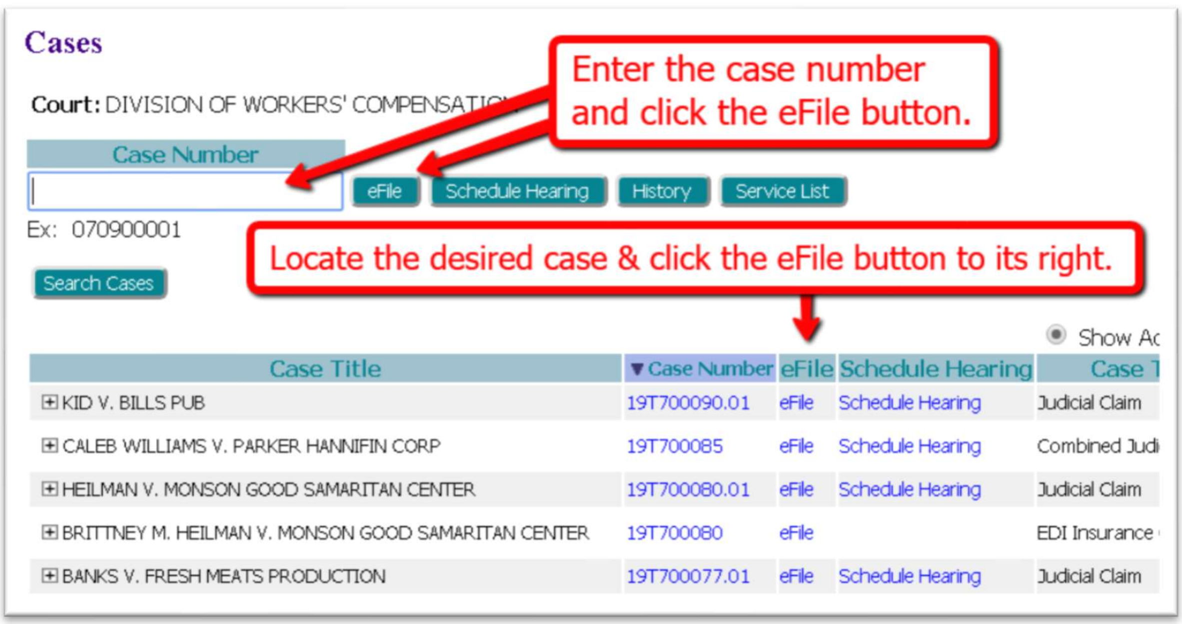
    NOTE: if the user chooses to save the filing to submit at a later time, click the **Move to Draft button**. When ready to submit the filing, hover over the **eFile tab** at the top of the screen and select **Draft Filings** from the drop-down list, OR, click on the **Draft Filings** button on the Home page. Locate the needed draft and click on the **hyperlink description** to be directed to the **Add-a-Document page** where **Next** button is clicked to return the filer to the **Review and Submit Filing page**.



FILING TO AN EXISTING CASE

1. On the Home Page, click the **Existing Cases** button

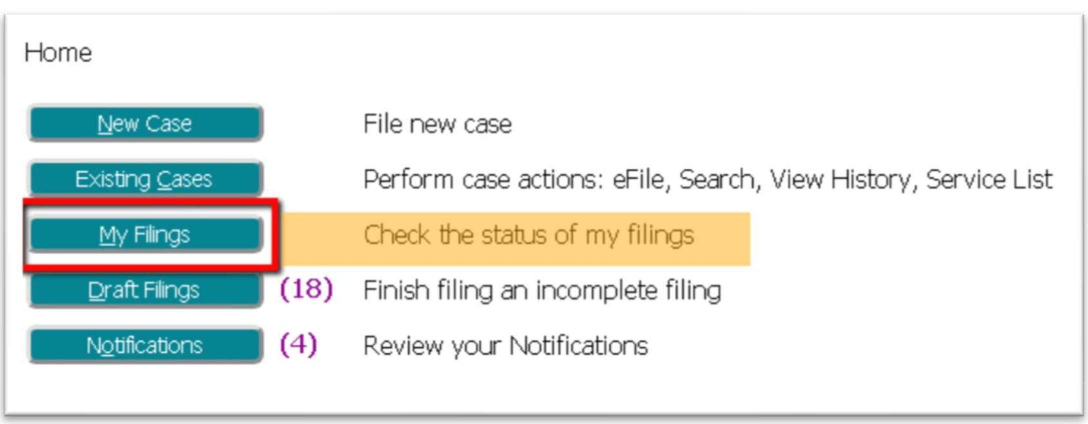
2. On the **Cases page**, enter the case number in the provided field and click the **eFile button**. Alternately, find the case in the Cases table listings and click the **hyperlink *eFile*** on the line of the desired case.



1. Proceed by following steps #11 - #17 from the **Filing a New Case** section listed above.

CHECKING A FILING'S STATUS

1. To check the status of a filing, click the **My Filings** button from the **Home** Page.

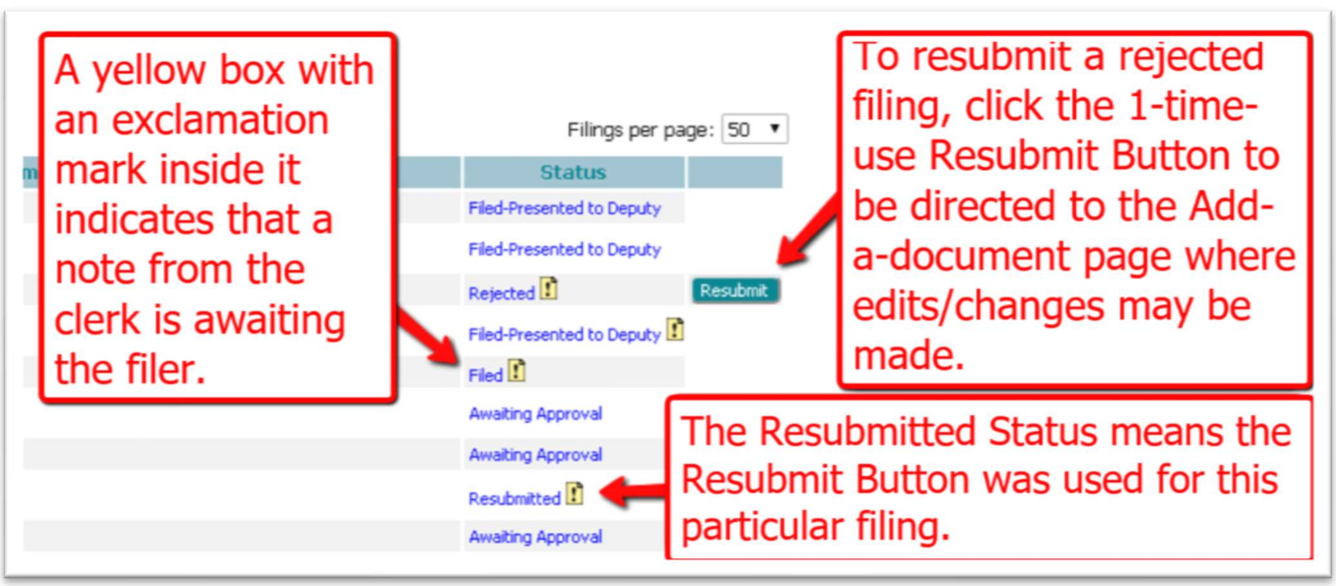


2. On the My Filings page, set the date fields to filter the search. If the information is known for Filing ID, Court Case #, Client #, and/or Status, fill in these fields. Click Go to locate the desired submission listing.

3. The Status column is on the far right. Click the status hyperlink to view more details about the filing, including documents and confirmation of receipt. File-stamped documents are available to be viewed and printed, if desired, when the status changes to either "Filed" or "Filed-Presented to Judge."

RESUBMITTING A REJECTED FILING

1. If a filing's status is **Rejected**, click the status link to view the reason for rejection.
2. A filing rejection will generate a "one-time-use" **Resubmit** button to the right of the status column.



Clicking **Resubmit** will cause the eFlex system to clone the information in the rejected submission for use in a new submission and will route the user to the Add-a-Document page so the corrections can be made. The user MUST continue through the new case or existing case submission process until the message that the filing has been submitted to the court is received.

3. Upon clicking **Resubmit**, the **Rejected** status will switch to **Resubmitted** to indicate the submission was cloned. The button will then disappear. If the filing is not submitted to the court when the button is activated, it will be stored in the **Draft Filings**.

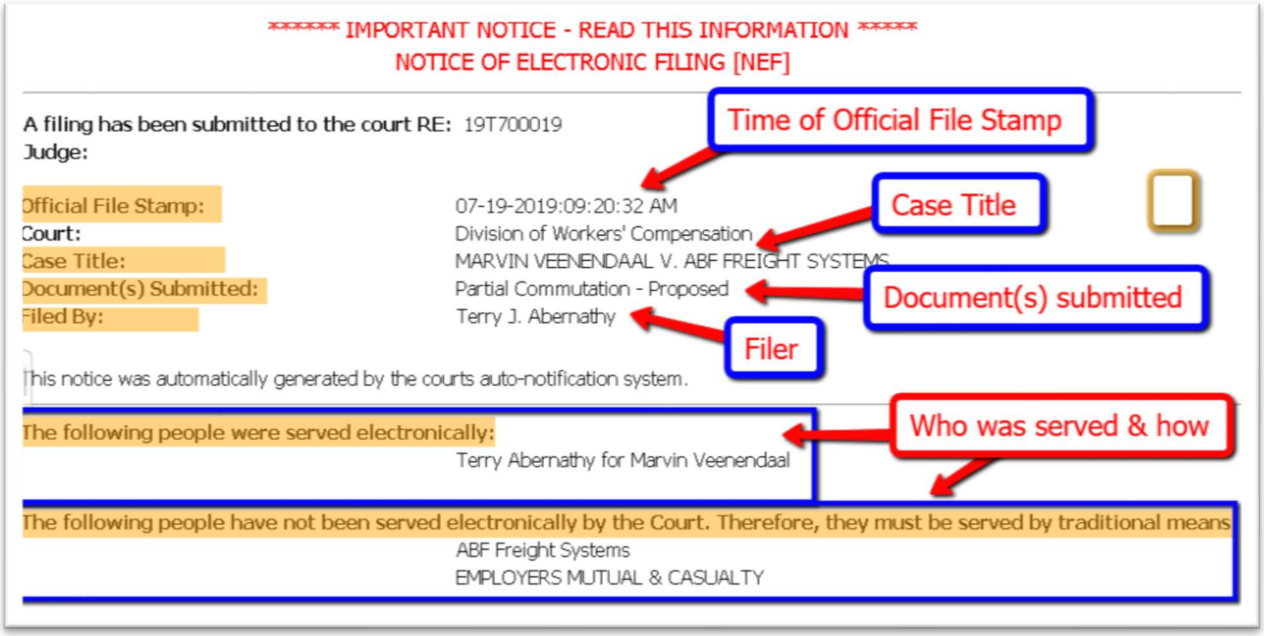
RETRIEVING NOTIFICATIONS

Notifications are the official court communication regarding eFiling activity on a case. To obtain the *official* notification, the user must login to the eFiling system. The user may also get *unofficial,* courtesy emails regarding efilings to the user's case.

1. On the **Home** page, click the **Notifications** button, or hover over the **Cases** Tab and select **Notifications** from the drop-down list.

2. Notifications with bolded blue headings are "Unread" Notifications. Additionally, unread notifications have a closed envelope to the left of the listing. This status is displayed when the page has been "refreshed" by exiting the page and then returning to the page.

3. To open the *Official Court Notification*, click on the hyperlink **Document Title** in the **Document(s) filed by column**.
4. The **NEF** (Notice of Electronic Filing) will display in a new browser tab.



a) The top of the NEF contains case-related information, including what **document(s)** were filed to trigger the NEF to be sent.
b) The bottom portion of the NEF indicates the **service requirements** at the time the listed document(s) were submitted. Future or past submissions may have different service requirements.
c) Persons being served via the email system are listed first on the NEF.
d) Persons still requiring service by traditional means are listed under the second heading.

5. To view document(s) on the **Notifications page**, click the hyperlink title listed under the **NEF title**. The time-stamped document will display as a pdf. Users may choose to download hard-copies for their records.

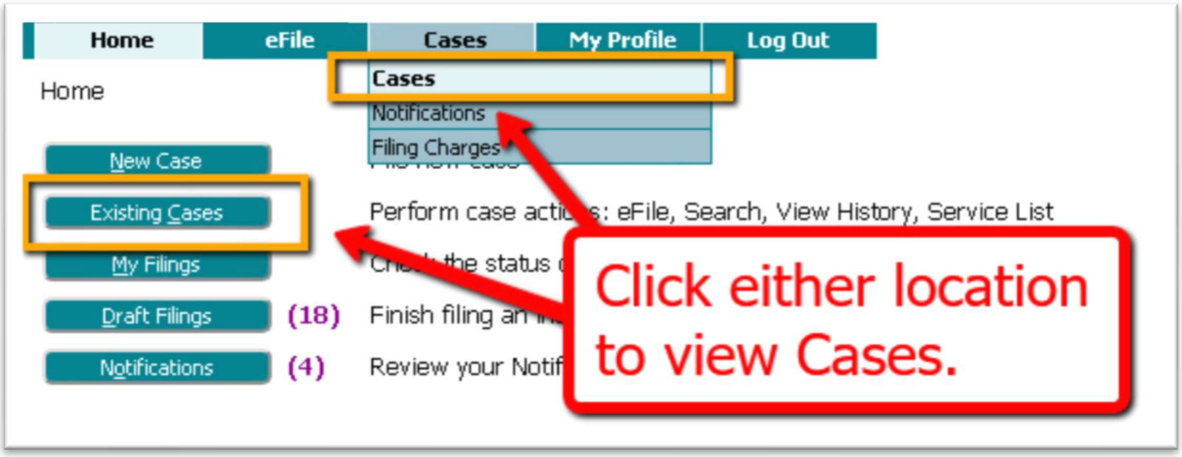
6. The system performs an auto clean-out 60 days after the NEF is delivered. Users can clean up the page manually by using the checkbox in combination with the delete button.

LOCATING CASE INFORMATION

The **Cases** page gives the user easy access to cases, documents filed to the case, and service list information associated to a particular case at the time of the query.

NOTE: During the transition period from paper-filing to electronic filing, it is possible that not all of an attorney's current cases will populate the **Cases Page**. EFiling a **Notice of Appearance** on these cases is advised (see instructions below). It may also be helpful to call the Support helpline for assistance.

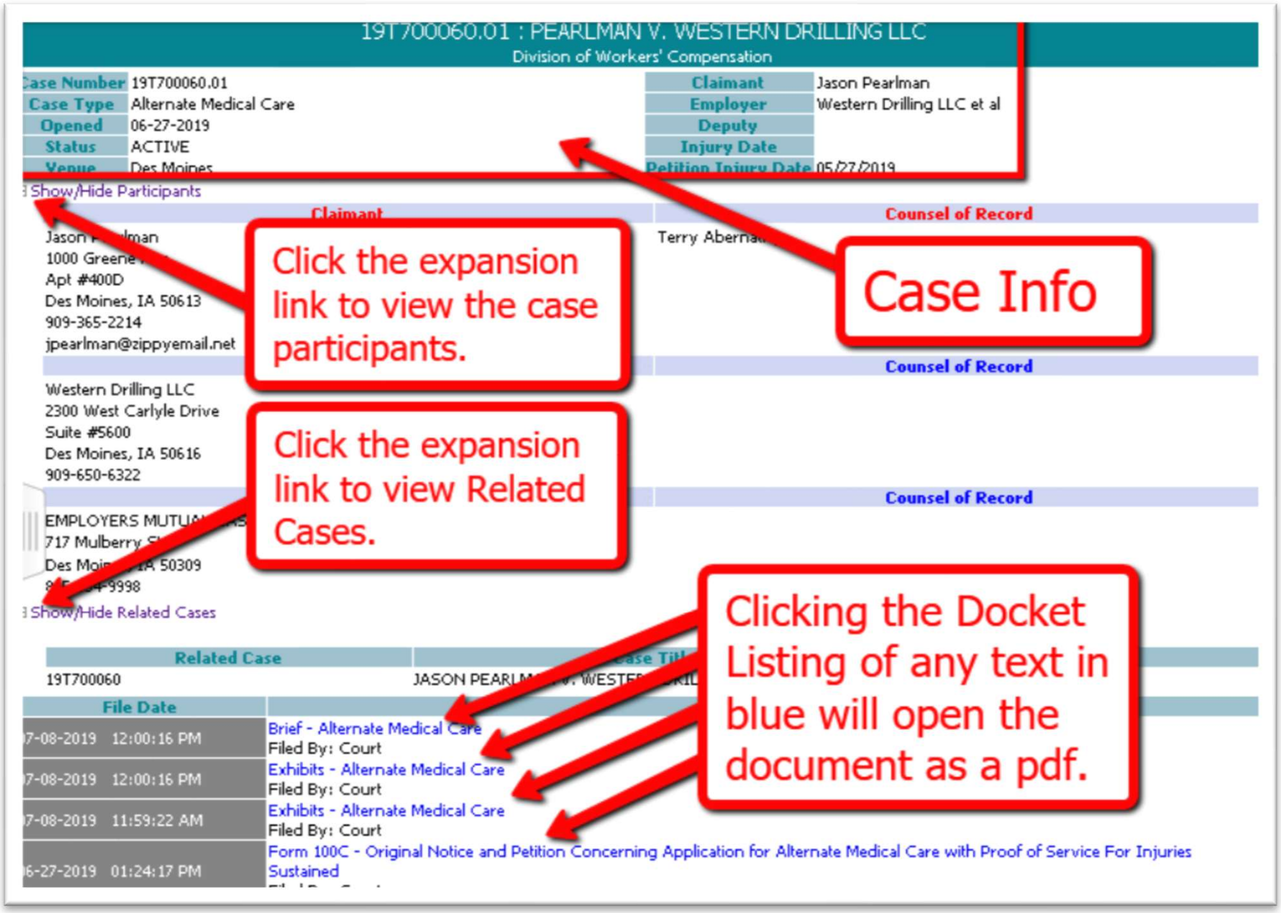
1) To navigate to the **Cases** page, click on the **Existing Cases** button on the Home page, or hover over the **Cases** Tab and select **Cases** from the drop-down list.



2. Enter the case number in the provided text field and click the **History button.** A **Case Summary** will display in a new browser tab. Alternately, one may also choose to click the **hyperlink case number** from the **Cases Table** to be directed to the **Case History page**

3. To view who has been electronically served and who needs to be served by traditional means, enter the case number in the provided text field and click the Service List button which will open a new tab and display the Certificate of Service. This page may also be accessed by locating the desired case in the Cases table and clicking the hyperlink Service List in the Service List column on the right.

NOTE: Although any user with a correct case number can file, users will not be able to view a case history unless they are party to the case or counsel of record on the case. Pro Se filers may need to file the document type Notice of Case Association.

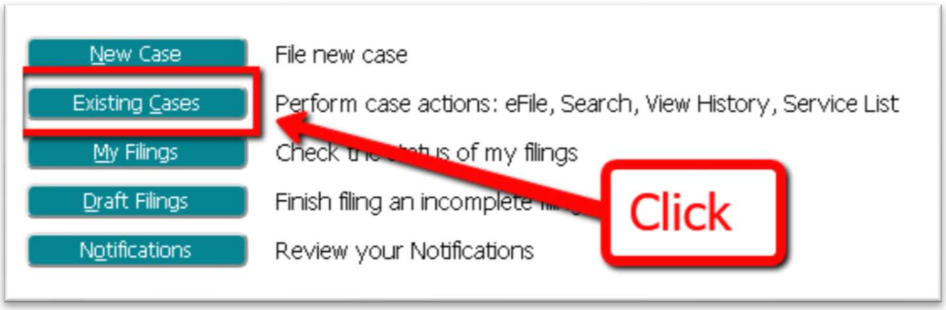


4. Within the Case Summary page, Click the Show/Hide Participants expansion link to view the case participants, their addresses and their Counsel of Record.
5. Click the Show/Hide Related Cases expansion link to view related cases.
6. Clicking the docket listing of any text appearing in blue will allow the user to open and/or save the document.

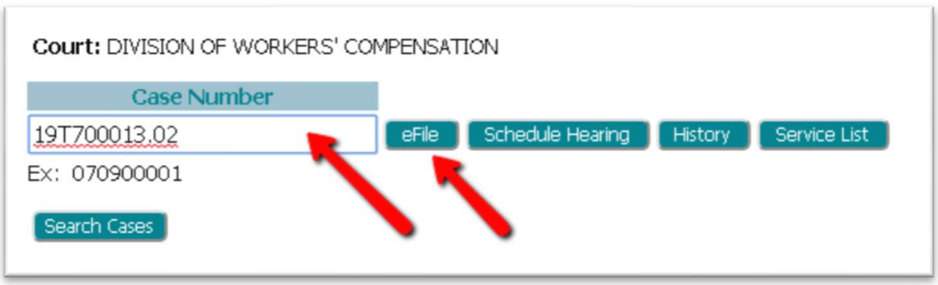
ASSOCIATION TO A CASE/NOTICE OF APPEARANCE

When an attorney efiles a new case, they will automatically be associated to the case and listed as the attorney for the plaintiff. When an attorney efiles an answer to a case, they will be associated to the case in this manner:

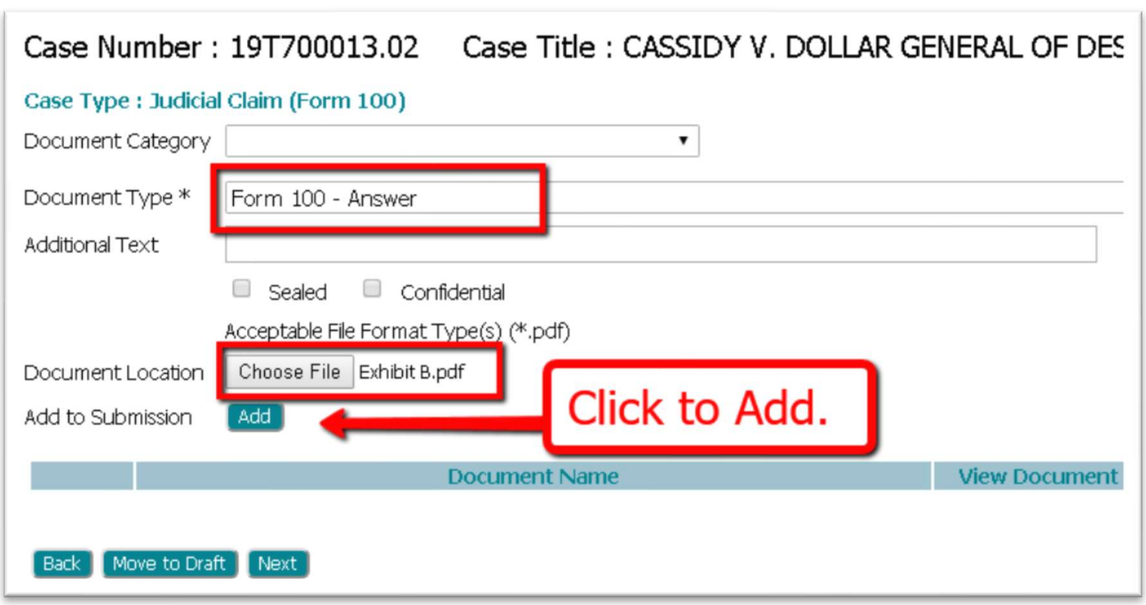
1) On the **Home page**, click to file to an **EXISTING CASE**.



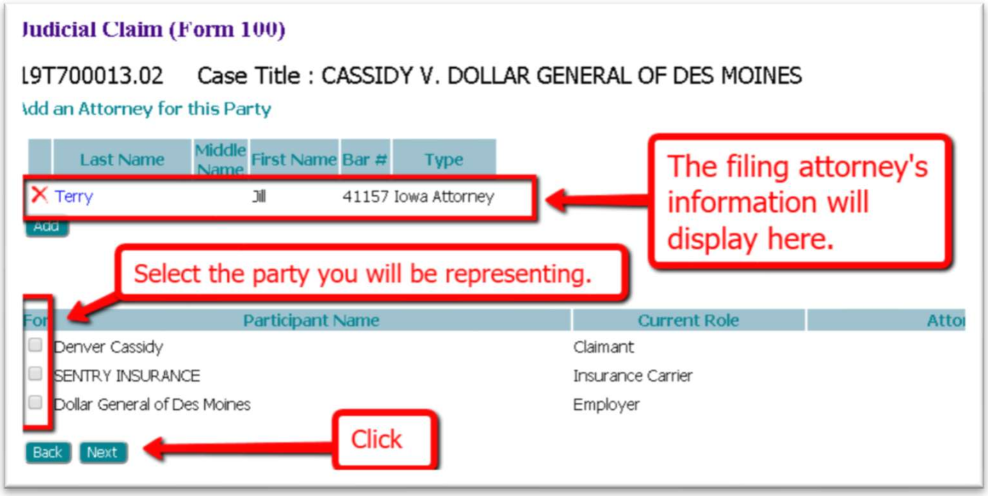
2) On the **Search Cases page**, enter the case number in the provided field and click **eFile**.



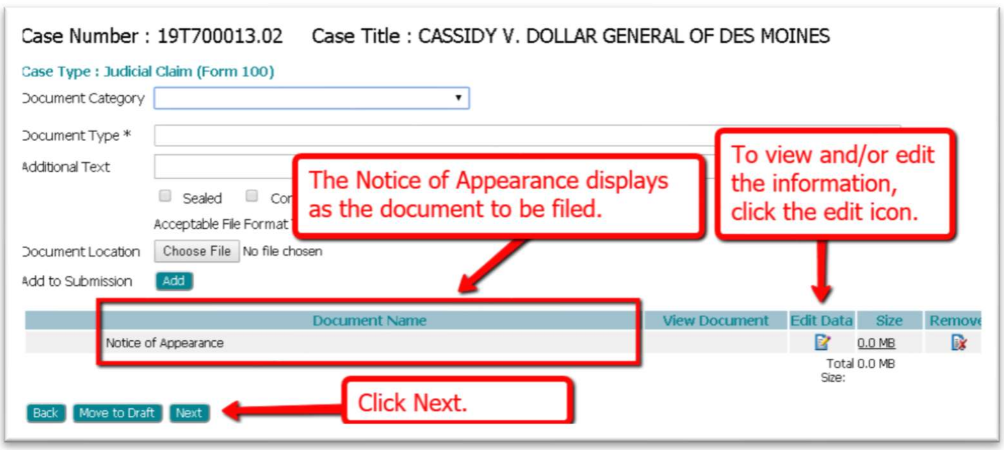
3) On the **Add-a-Document Page,** select the appropriate **Answer Document** in the **Document Type field**, click the button **Choose File**, and browse the computer to locate the prepared document.



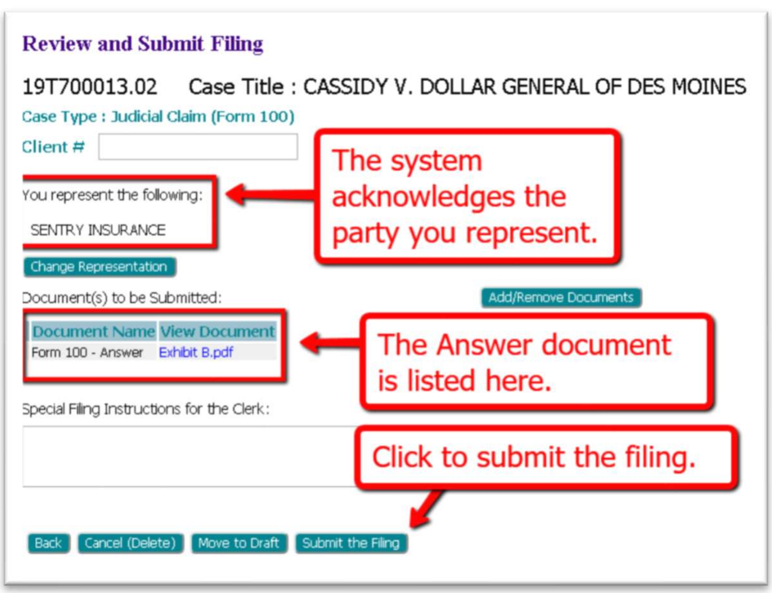
4) When the **Add button** is clicked, the user will be directed to the **Notice of Appearance page** where the attorney marks the box next to the party they are representing. **Click Next.**



5) The screen displays the document that will be efiled in the **Document Name column**. Click the **Next** button.

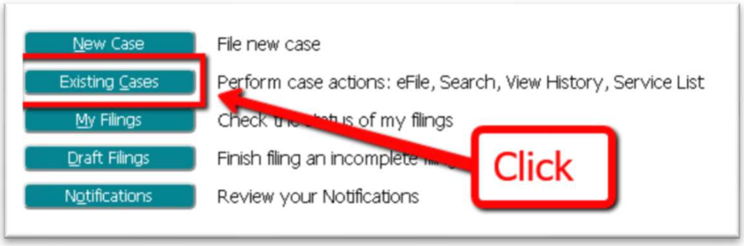


6) This brings the filer to the **Review & Submit Filing** page where the button **Submit the Filing** is clicked to complete the submission.

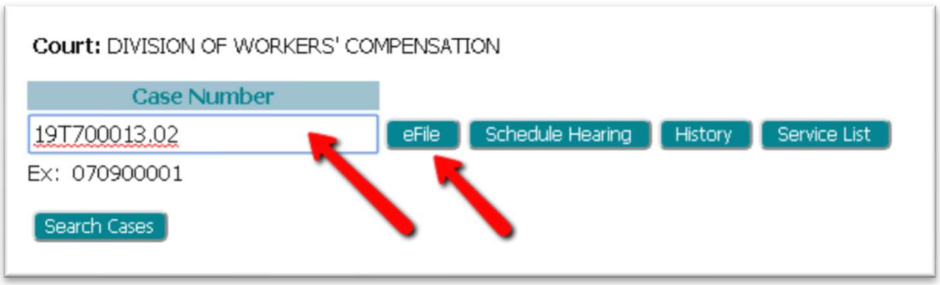


During the transition period from paper-filing to electronic filing, it is possible that not all of an attorney's current cases will populate the **Cases Page**. Efiling a **Notice of Appearance** on these cases may be advised. This is a similar process to the above listed steps:

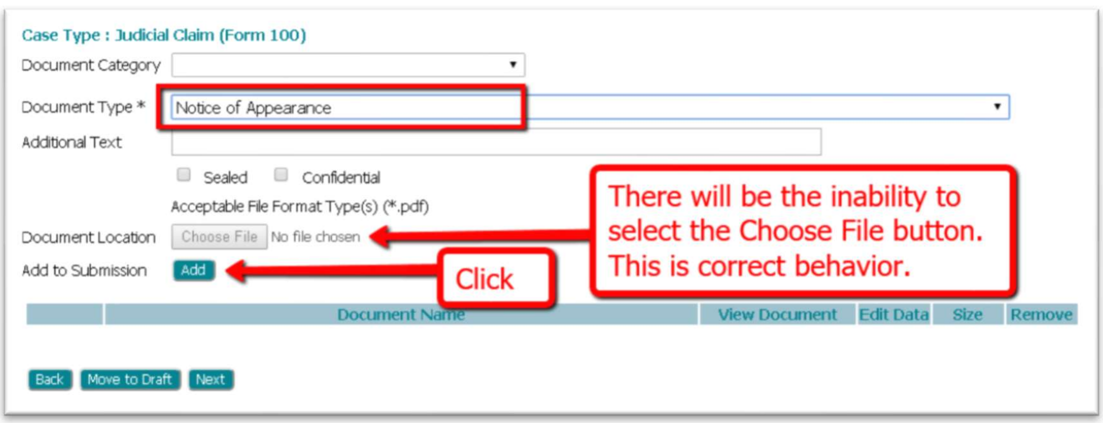
1) On the **Home page,** click to file to an **EXISTING CASE**.



2) On the **Search Cases page**, enter the case number in the provided field and click **eFile**.

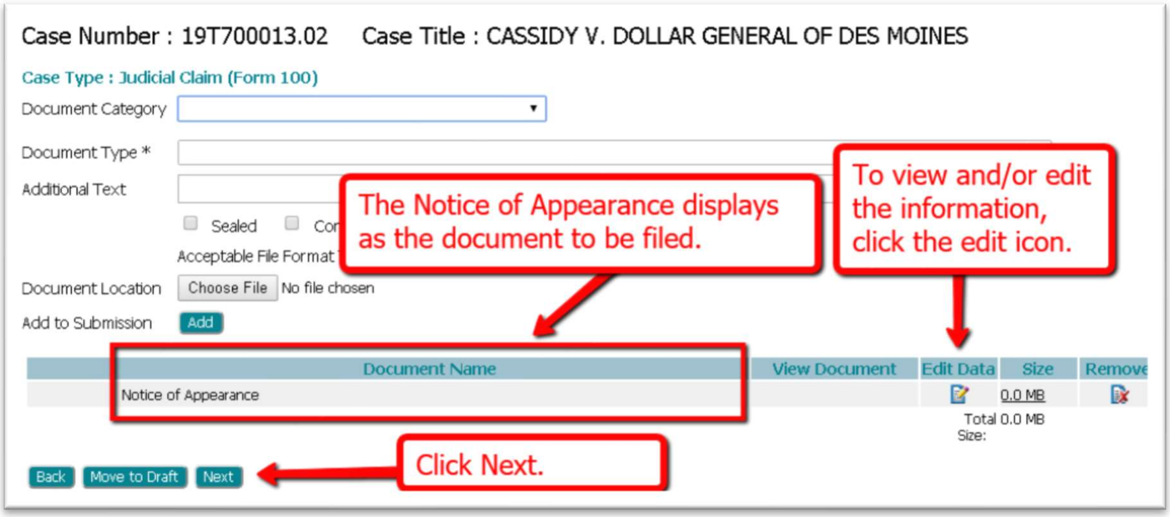


3) On the **Add-a-Document Page,** select Notice of Appearance and then click **ADD.** The **Choose File** button will be grayed out and inaccessible to click because it is not necessary to upload a document for this document type.

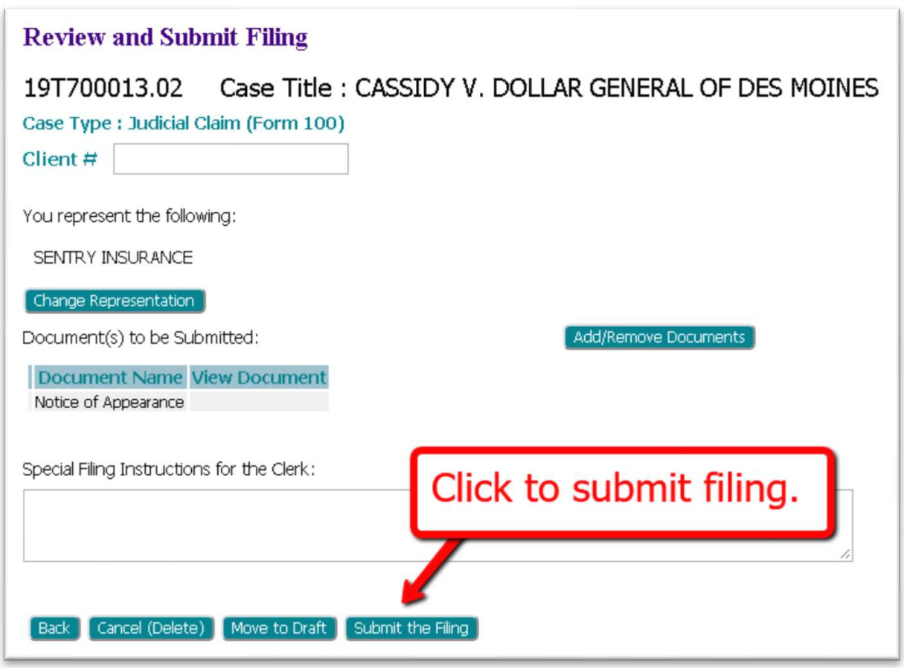


4) The next screen asks the attorney to mark the box next to the party they are representing. Click Next.

5) The screen displays the document that will be efiled. Click the **Next** button.



6) This brings the filer to the **Review & Submit Filing** page where the **Submit the Filing** button is clicked to complete the submission.



PAYING FOR FILING FEES

In the beginning stages of the Go-Live eFiling process, filing fees will be paid directly to the court by check. Very soon, the process of paying through the Filer's Interface will be implemented. At that point, the filer, after completing their submission on the **Review and Submit Filing page**, will be directed to the Payment Vendor's site. Information will be provided when this functionality is activated.

SCHEDULING A HEARING

The functionality for scheduling a hearing has been disabled at this time. When the scheduling feature is activated, the User's Quick Guide will be updated with step-by-step instructions.

Q&A

Why was I logged out of the system?

When working inside the Filer's Interface, be aware that the system will automatically log you out should there be 30 minutes of inactivity. If you plan to step away from your computer and don't want to lose any data that has been entered, click on the **Move to Draft button** found at the bottom of the **Add-a-Document Page** and the **Review and Submit Filing page.**

How do I continue with a filing that has been moved to *Draft*?

When ready to complete a Draft filing, hover over the **eFile tab** at the top of the screen and select **Draft Filings** from the drop-down list, **OR**, click on the **Draft Filings** button on the Home page. Locate the needed draft and click on the **hyperlink description** to be directed to the **Add-a-Document page** where the **Next** button is clicked to be returned to the **Review and Submit Filing page**.

For easier searching, are any of the case tables within the eFiling system sortable?

There are **Case Tables** found on each of the following pages: **Cases page, Draft Filings page**, **My Filings page**, **Notifications page** and **Filing Charges page**. The first four pages are found under their corresponding buttons on the **Home Page**, whereas the last one listed is found under the **Cases Tab**. Each column header has an ascending/descending order **sort feature** by clicking on its **Title** and controlling the listings with the **up/down arrow**. Click on the **column heading** of the column you wish to sort. The **up/down arrow** will transfer to that column to allow for the desired sorting.

How do I bring up the Case History Page for any of my cases?

On the **Home page**, click on the **Existing Cases button**. In the Cases table, click on the **hyperlink case number** in the **Case Number column** and a new browser tab will open up and display the **Case History page**.

Why can't I edit the organization listed on My Profile Page?

To edit your profile, hover over the **My Profile Tab** at the top of the screen and select **My Profile**. This directs you to the **User Profile page**. At the bottom of the page click the button **Modify User Profile**. This opens the page where edits may be made on any of the text boxes. The *role, user name, organization, bar number,* and *company address* cannot be edited by the user and requires a call to the Support Number for an administrator to make those changes.

How do I eFile as a claim representative?

Follow the instructions for requesting an eFiling account and select the role of **Claim Representative**. In this role you will have limited permissions. You will have the ability to file **Medical Reports** and **Settlement Documents,** but you will not have access to the case information since you are not a party on the case.