

E-Filing Checklist

- Did you **convert** the pleading/judicial council form to a PDF?
- Did you **attach** a Proof of Service by electronic service provider?
- Did you **attach** any Exhibits?
- Did you **Redact** out any confidential information—bank account numbers, social security numbers, driver’s license numbers, or other private information which should not be part of the Court’s record.
- Did you **Mark Exhibits** with the Text Tool or otherwise insert Exhibit Pages to the file?
- Did you make any “scanned” documents “**text searchable**” (OCR)?
- Did you **paginate** the ALL the pages (including Exhibits) sequentially? (i.e. the entire document has one set of page numbers 1 through x, that matches what the pdf shows.)
- Did you **bookmark** the Exhibit Pages?
- Did you check that the **file size** is less than 20 MB? If not, “Save as Other” and select a **Reduced Size PDF**.
- Do you have a copy of the **original signature** for documents signed under penalty of perjury for your files? (i.e. Proof of Service, Declarations, Verifications)

Creating Documents for E-filing

1. **Convert Word/WordPerfect Files to PDF.**
 - a. From Word/Word Perfect: Print final document to PDF by selecting Acrobat as the Printer, save document on network where appropriate (probably the pleading folder).

OR right click on the file and select "convert to pdf"
 - b. From a fillable judicial council form: Print to PDF and save the document with a new name to get a non-fillable version. NOTE: You will probably need to use the Edit Tool to type "/s/ typed name" on the signature lines.

2. **Attach Proof of Service and any Exhibits to the converted PDF Pleading.**
 - a. Open Acrobat Program (not document)
 - b. Select the "Tools" Menu > "Combine Documents" Tool > Drag and Drop the files you want to combine (it will convert Word files automatically), placing them in the order you want them to appear (i.e. pleading first, then exhibits).
 - c. Select "Combine Files"
 - d. Save Document.

3. **Add Exhibit labels in Acrobat (if you didn't mark on the scanned pages)**
 - a. Open File With Exhibits
 - b. Select "Edit PDF"> "Add Text"
 - c. Type "Exhibit __" where you want to mark the exhibit.

4. **Redact any Confidential information (bank account numbers, social security numbers, confidential addresses, attorney-client privilege)**
 - a. With your document open,
 - b. Choose Tools > Redact.
 - c. The Redact toolset is displayed in the secondary toolbar. In the secondary toolbar, choose Mark for Redaction > Text & Images.
 - d. Mark items you want to remove by doing any of the following:
 - i. Double-click to select a word or image.
 - ii. Drag to select a line, block of text, object, or area.
 - e. When you have finished marking the items you want to redact, click **Apply** in the secondary toolbar to remove the items, then click OK.
 - f. **Save Document**

5. OCR/Text Searchable Pages:

- a. With file open,
- b. Select "Enhance Scans" > "Recognize Text" > Select English and then press "Recognize Text"
- c. It is okay if you get an error that says there is already "renderable text", just press ignore all future errors and press okay, it will find all the "non-renderable text" and skip the "renderable text".

6. Sequentially Number the Pages of the pleading and exhibits to match the pagination in PDF.

- a. With file open
- b. Select "Edit PDF" > "Header/Footer" > "Add"
NOTE: if you converted your document from Word which already has a footer, do not "Replace" because it will delete the Word Footer.
- c. Insert Page Number in bottom left of page (you can save the settings for future use).

7. Bookmark Exhibits in PDF.

- a. With File Open, go to the page you want to bookmark.
- b. Open the Navigation toolbar on the far left of the document (click on far left side if not open). Also, you can open by going to "Edit PDF" > "More" > "Add bookmark"
- c. Select the "bookmark icon" (looks like a bent bookmark) > Select "new bookmark"
- d. Type in the Name for the bookmark (i.e. Exhibit 1: Title of Document)
NOTE: If you combined files in Acrobat, then you may already have bookmarks for the different documents. If you redacted information in the document, this will either delete the bookmarks entirely or render the bookmarks non-functional unless you preserve the bookmarks and links when applying redactions, so you will have to delete the broken bookmarks and put new ones into the file.

8. Reduce File Size if File over 20 MB:

With your file Open,

Choose File > Save As Other > Reduced Size PDF.

Select "retain existing", and press OK.

Options for Correcting Errors/Rejected Documents Without Starting Over:

1. **Minor Edits to the PDF:** This is great for changing things like the Department number on the caption or the date or time of the hearing.

With your file Open,

Select "Edit PDF" > "Edit"

Then make whatever corrections you would like.

NOTE: If you use an unusual font for your pleadings, this option is not available. This will work for Times New Roman and any other fonts which are included in Adobe Acrobat only.

2. **Replace Pages in a PDF:**

- a. Make whatever corrections are necessary in your Word/Word Perfect file.
- b. Save Word/Word Perfect File as a PDF.
- c. Open the PDF with the error in it in Adobe Acrobat
- d. In the PDF with the error in it, select "Organize Pages" > "Replace"
- e. In the pop up window, navigate to the Corrected PDF you just created from Word/ Word Perfect and click "Open"
- f. Select the pages you want to replace in the Original PDF (the one with the error in it)

NOTE: I typically just replace the entire Word Document rather than just a single page, i.e. if the Word file is 10 pages, I will replace pages 1 through 10, that way my Word file matches my PDF file.)

Electronic Signatures

1. Electronic Signatures (i.e. "/s/ typed name) are preferred because the Court gets a very clean "text searchable" document, which they can't get with a scan.
 - a. It prevents the document from being rejected for being illegible.
 - b. It makes sure that if you ever have to get a certified copy from the Court that you will get a "clean copy" that is able to be recorded.
2. We must maintain the original "wet" signature in our files for documents signed under penalty of perjury ONLY.

Exceptions to the Rules:

Lodged Wills: The Lodged Will shall be lodged *electronically* and the original delivered or mailed to the Court within 10 days.

Documents that can't be converted to electronic form: The Court "may" allow documents which cannot reasonably be converted to electronic form to be filed in paper form.

E-Service

Include a proof of service, just like always, but all Attorneys will be E-service and any other non-attorney parties that CONSENT to e-service. Everyone else is mail only.

Add the filing attorney to the e-Service list, that way the filing attorney sees exactly what document was sent out by the EFSP and knows when the document was actually sent.

Add 2 days to the time to file a motion for E-service (versus 5 days for mailing). (CCP 1010.6(a)(4).)

Monterey Probate Investigator: For all conservatorships, electronic service on the Probate Court Investigator shall be sent to: probateinvestigator@monterey.courts.ca.gov

Examples of Information that should be redacted:

- Social Security Numbers
- Bank Account Numbers (or leave last 4 digits for identification if relevant)
- Privileged Information (Attorney-Client Privilege, Work Product, i.e. on legal invoices)
- Medical reports (or filed as a confidential document)
- HIV laboratory test results (or filed as a confidential document)
- Psychological records (or filed as a confidential document)
- Custody investigation reports (or filed as a confidential document)
- Police reports (or filed as a confidential document)