

Sayler Legal Service, Inc. was established in 1991, and that history doesn't help one bit in this electronic world. Let us set aside age and experience and embrace technology by learning from those in our circle who are electronically gifted. To not reinvent the wheel, please accept the list below as a conglomerate of information that I've gathered from those who have helped me along the way in becoming an EFSP (Electronic Filing Service Provider).

Please know that when you submit an electronic filing, it is still being reviewed by a clerk so that it may be accepted or rejected. Communication is key – help them help you. For the “nuts and bolts” of how to prepare and submit your documents for eFiling, please follow this link to a guide written by Christi McDonald, Esq. (who is a wizard):

[eFiling Checklist](#)

Here's the web address to the same:

<http://saylerlegal.com/wp-content/uploads/2016/07/eFiling-checklist.pdf>

Let's help the clerks and judges:

- Whether you are filing a new case or on an existing case, the bottom of the screen in the section labeled “Review & Submit”, please find the box labeled “Clerk Memo”. Each EFSP may label it a bit differently, but it's quite useful.
 - If there's a chance any fees are due, I suggest you type “I authorize the Clerk to charge me additional fees in the event I miscalculated.” A clerk cannot charge you more than what you've designated without your authorization. It's easy to forget to look in that pull-down menu for things like court reporter/jury fees.
 - Sadly, if you type “Statute of Limitations runs today in 10 minutes!” the clerk cannot view this on their monitor of incoming items. They only see this once they open the envelope. But type it anyway and plead your case if the filing is not deemed filed until the next day.
 - When choosing an Ex Parte date/hearing date, you may note “If calendar date is full, please provide next available date”.
 - If you are unsure of which Document Type to select from the pull down menu, you can provide further explanation to the clerk. Perhaps you chose a type that would not incur a fee, even if it didn't make perfect sense. Amended documents tend to fall into this category.
 - Confidential v Public – If you're unsure “Confidential” will be acceptable to the court, I suggest this comment: “Do not reject; okay to change from Confidential to Public if need be.”
- Avoid using colored text. If you need a photo to be in color to be effective, then produce it in color.
- Avoid using all capital letters.
- Document Type/Document Description – The Document Type is not always viewable on the judge's monitor; they're only seeing the Document Description in some courts. The Document Type may be “Complaint”, and the description provided by the filer may be “2016-06014 Johnson.pdf”. If the judge can only see the description, he has no idea this document is the Complaint. Our portal automatically repeats the Document Type in the Document Description field. You may add to this field for specificity purposes, but do not erase what appears in this field if you want to please the judges.
- Poor quality documents like deeds can be tricky. If you attempted to get a cleaner copy and failed, I suggest you add a page to the document prior to the poor attachment: “Regarding the attached document of poor quality, under penalty of perjury, to the best of my knowledge, the text on the attached document that is difficult to read is transcribed below:” Transcribe the fuzzy part of that legal description for the court.
- You upload a document but the clerk only sees blank pages or cannot view the pages. We've experienced this occurrence in two scenarios.
 1. You have an exhibit and you made it “text searchable” (OCR). This can render the documents blank when uploaded. Start over and remove the OCR formatting and then upload again. If it still doesn't work, try re-sizing.
 2. Use “unlocked” version of Judicial Counsel forms. When filers try to submit forms they've downloaded from the Judicial Council website, they are rejected because they are “secured”. The versions posted at the link below have removed the security, so that they can be submitted without issue.
<http://www.greenfiling.com/california/court-forms>

Some other helpful hints:

- If you upload Word/WordPerfect documents, our portal will convert to text-searchable PDF's. Be aware of the size limitations of your EFSP (range from 8 mg and up). Our portal is 20+ mg. Keep resolution at max. of 300 dpi to keep file sizes reasonable.
- Upload each document that you want to be file stamped separately. You can upload multiple documents into the same filing envelope.
- eService – An EFSP allows you to file and to conduct eService. You can also eServe without a filing (Home page, side menu, "Create Serve-Only"). If you file and eServe, but then your document is rejected, fix and re-serve. Everyone in the case can see who was served, but they cannot see the actual email addresses. A proof of service is still required and you mark that the service was done electronically. Our portal allows you to view when the email was opened.
- Request additional services – There is an option to ask your EFSP to deliver courtesy copies of the documents you just filed during the eFiling process. You can also ask that they be served on the defendant, opposing counsel by hand-delivery, etc., all during the eFiling process creating a quick, one-step communication.
- If you flip from one EFSP to another, (e.g. Odyssey eFileCA to Saylor Legal Service), you do the initial set up of your account, and all the case information is accessible to you just as before. All the Tyler Odyssey certified EFSPs connect to the court's EFM (electronic filing manager), which utilizes the Odyssey case management software. Once you establish your account at our portal, go to "Settings" in the top bar menu, then select "User Preferences" from the side menu. If you uncheck the top 3 boxes in the bottom section titled "Odyssey eFileCA User Preferences", you avoid receiving duplicate emails being generated by the Odyssey system (that you're already receiving from our system).
- "Payment Settings" (side menu) - I recommend you establish a minimum of two payment accounts (one credit card and one bank checking account). Click on "Add Payment Account" and use a name that's obvious to you ("ABC Law Credit Card", "Law firm checking", etc.). If you do work for public entities, also establish a "Waiver" account. All of these payment types can easily be found in the "payment account type" pull down menu. Why multiple payment accounts? A checking account transaction is a flat \$1.00. A credit card transaction incurs a convenience fee based on a percentage of the total fees charged (filing fees plus transaction fees). You may also want to establish payment accounts for your trust checking accounts. Not all courts accept all payment types at this time, and a credit card is still the only option in some courts.
- Reports – New reports are being developed at this time and the next release of upgraded reports for our portal is scheduled for September 10th. Detailed reports by case, including fee advance information, are helpful in reconciling payments and invoicing your clients. We will continue to improve upon these to meet the needs of our clients.

Notable Notes –

CCP – 1010.6

(2) (A) When a document to be filed requires the signature, not under penalty of perjury, of an attorney or a self-represented party, the document shall be deemed to have been signed by that attorney or self-represented party if filed electronically.

- **So, for example, you may now see complaints with no signatures filed with the court, but Proofs of Service (signed under penalty of perjury) will still require signatures.**

(3) Any document that is electronically filed with the court after the close of business on any day shall be deemed to have been filed on the next court day. "Close of business," as used in this paragraph, shall mean 5 p.m. or the time at which the court would not accept filing at the court's filing counter, whichever is earlier.

- **At the time of this article, both Monterey County and Santa Cruz County established a 5 pm cut-off. Santa Clara County reports that their cut-off will**

always align with the cut-off time of their drop box. So if that time changes, the cut-off for eFiling will automatically change.

Rules of Court - (b) Mandatory electronic filing

(1) The court must specify the types or categories of civil actions in which parties are required to file and serve documents electronically.

- This is important because each court introduces eFiling differently. For instance, San Luis Obispo County accepted limited civil electronically for a long time before accepting unlimited civil (mandatory on different dates).

FREE PDF Conversion tools:

- CutePDF - <http://www.cutepdf.com>
- PrimoPDF - <http://www.primopdf.com>
- Don't have Adobe Pro and need to split up a document that is too big to file ... try <http://www.splitpdf.com/>
- Don't have Adobe Pro and need to merge two PDF documents together ... try <http://www.pdfmerge.com/>
- Don't have Adobe Pro and need to rotate scanned images ... try <https://www.pdfrotate.com/>

Please know that the information provided may be instructions from various court officers, lessons learned from an attorney that experienced multiple rejections, "best practices" from seminars and the daily guidance and training by George Knecht, our eFiling software provider. Not all the information may be applicable to all courts, but I hope this information was generic enough to be useful in many venues. And if I mentioned any glitches that now no longer exist due to software updates by Tyler Technologies/Odyssey, my apologies and thankfulness to the fixers.

Please visit our website (www.SaylerLegal.com) for more information on eFiling and the services that we offer. You can also reach my Court Service Manager (Misha Conrad) and my entire team at Info@SaylerLegal.com, or telephone (831) 384-4030. You may also find the link to our portal on our website, or type in your browser: efile.saylerlegal.com