



PART 2 IN A SERIES

## Implementing a Successful eFiling System

*When choosing an eFiling system, it's easy to focus solely on internal document management needs and judicial processes, but taking steps to support the filer is equally critical and often a costly oversight in the implementation process of a successful eFiling system. If user-friendly design and top-notch client support aren't at the top of your criteria, you may find a rough road ahead, consisting of frustrated filers and a much slower adoption process—as well as more paper-handling, money processing and support issues than you bargained for.*

*But you can avoid the bumpy ride, and save valuable time and resources, simply by evaluating the eFiling solution beyond the Court's perspective. To help keep you (and your filers) on the road to smooth eFiling, we've compiled a checklist of essential elements to take into consideration when selecting and implementing an eFiling system.*

## The Essential Elements of an eFiling System

### **USER-FRIENDLY PORTAL**

Ask for a hands-on demo of the application from the filer's side where you get a chance to actually file a document. The application should offer a user-friendly portal with logical menus and obvious graphical icons and a simple, step-by-step filing process. Submitting filings in a reliable, intuitive manner is a necessity and should be a seamless, fast and properly supported process for the filer. A system that is self-explanatory, easy to use, and offers on-screen direction translates to a smooth implementation, decreased anxiety and increased adoption.

### **EXTENSIVE WEBSITE RESOURCES**

The application should provide a convenient location for end users to find answers to their questions. Frequently asked questions and specifics surrounding the electronic submission procedure such as filing deadlines, electronic signatures, exceptions to electronic filings and instructions on how to register are some of the resources that the application should make readily available online. When easy to use online resources are unavailable, finding answers to questions becomes a frustrating process.

### **SUPPORTING ALL LEVELS OF THE COURT (TRIAL AND APPELLATE)**

The application should be able to support all levels of courts including trial and appellate courts. Easy access to documents amongst the courts with electronic linking to lower court cases is also imperative to improve efficiency, ensure integrity of case data and documents, and facilitate the flow of information between the courts.

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## **TIMELY CLIENT SERVICE**

Regardless of how much training is offered, you'll still need to answer questions—especially from filers who are new to registering and eFiling. Therefore, it's imperative to choose an eFiling vendor offering client service that is available 24 hours a day, 7 days a week and 365 days a year. A call center offering round the clock reliable service must be able to provide answers about filings, timelines, or general jurisdictional inquiries. The ideal call center support should offer:

- Multiple options for filers to communicate with support including phone, email and "Live Chat"
- Court specific phone options that include detailed directions and guidance to filers who call a specific toll-free number
- Product knowledgeable call center staff with strong communication skills
- A ticketing system to ensure all calls are tracked and timely follow-up is provided

## **EASY PAYMENT PROCESS AND FINANCIAL TRANSACTIONS**

Having an easy online payment process is essential. Some questions to ask include:

- How will payment processing and financial reconciliation be handled?
- How will statutory fees be collected, deposited and refunded?
- What payment methods will be accepted and will fee waiver options be provided?
- Can the eFile system provide extracts or integrate with the Court's financial system?

Some courts require firms to deposit money in escrow accounts, which can be an expensive drain on firms, and is not a very client-friendly process. An eFiling vendor should be able to handle the Payment Card Industry Data Security Standard (PCI DSS) requirements for you, collecting both court fees and filing fees. Eliminate the burden of collections and worrying about bounced checks—your eFiling vendor should provide a seamless service for your filers by offering credit card transactions or even firm-wide billing.

## **COMPREHENSIVE TRAINING RESOURCES AVAILABLE**

Regardless of how intuitive the application is, training should be readily available and cover all levels of filers:

- Attorneys
- Judges
- Government filers
- Out-of-state filers
- Legal staff
- Judicial staff
- Legal aid organizations
- Self-represented litigants

Training should cover topics such as the basic how-to's of eFiling, best practices, filing checklists, rules and ethics, new features and content should be updated with new versions or as client needs evolve. The eFiling vendor should also offer several types of self-service training such as remote webcasts (bi-weekly or monthly), online tutorials and user manuals. In addition, consider live, one-on-one "walk-through" trainings—which allow filers to get individual and focused assistance to their eFiling inquiries.

Finally, whether creating the application yourself or choosing an eFiling vendor, take the time to understand the needs of your filers and how you or your vendor are set up to support those needs. Partnering with an eFiling vendor that has a support system with a call center, training and the ability to provide the client assistance filers need will make adoption easier for the filer (and you) plus save big headaches down the road.

## **About File & ServeXpress**

File & ServeXpress, headquartered in Irving, Texas, focuses on providing attorneys with case, document and party management solutions that simplify the litigation workflow of a case. By offering electronic filing to courts, process service, secure document exchange among judges and attorneys, alert and notification tools, and a document repository, File & ServeXpress offers a complete litigation solution for the life of a case.

The File & ServeXpress team has successfully worked with attorneys and courts around the country to implement electronic filing, with existing eFiling and/or secure document exchange projects spanning 30 states and the District of Columbia. The current products in the File & ServeXpress portfolio include File & ServeXpress, File & Serve Indiana, and CaseFileXpress.

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