TrueFiling™

User Guide – Attorneys, Contacts and Self-Represented Filers

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Table of Contents

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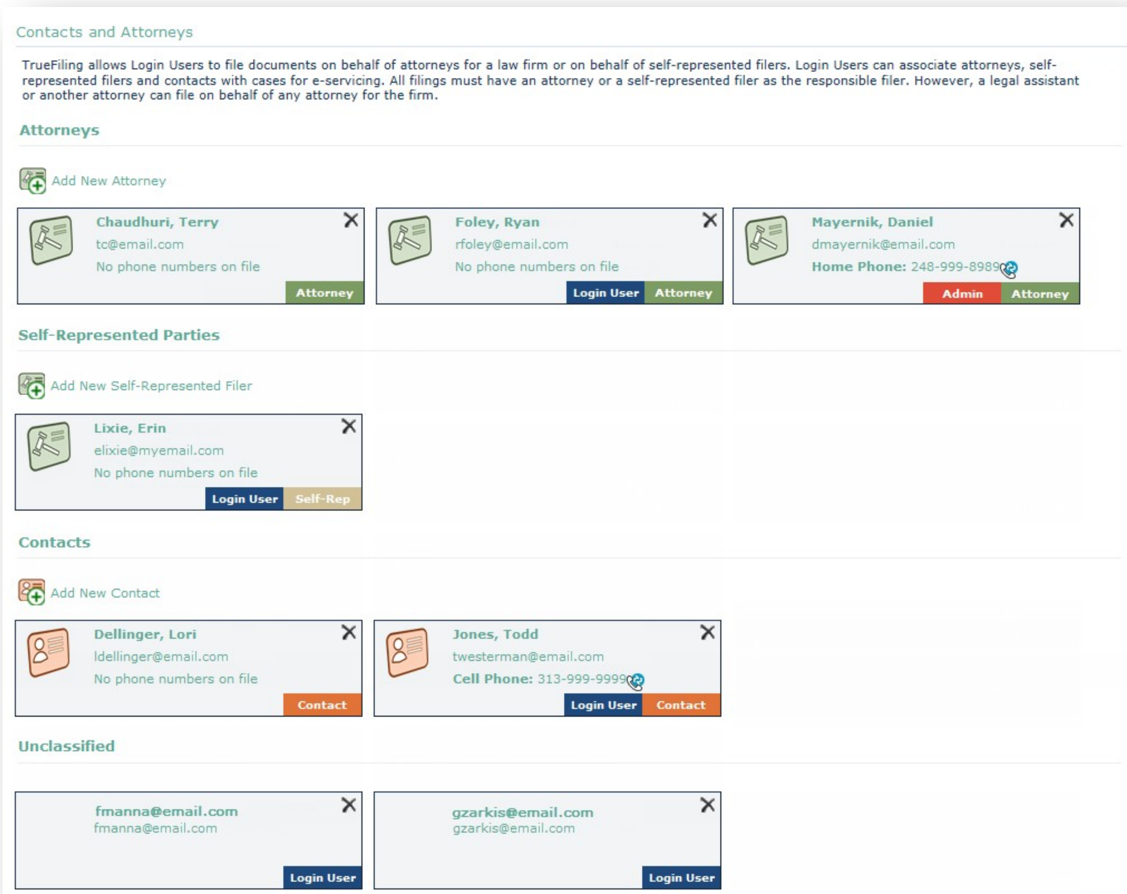
Attorneys, Contacts and Self-Represented Filers

The Contacts and Attorneys page is used to add and manage contacts, attorneys, and self-represented filers to a firm. You can select some or all of those listed for document e-service for a case.

This page is also used by administrators to invite users to join the firm's TrueFiling Law Firm site and enable those users to submit filings. The administrator can manage the users who can log on to the site (Login Users), including assigning the roles and rights. Administrative activities are detailed in the *TrueFiling Administrator Guide*.

Select **Settings >> Contacts and Attorneys** in the navigation pane to access the Contacts and Attorneys page.



NOTE: For non-administrative users, the "X" in the upper-right corner of the placard (which is used to remove the person from the firm's site) is not displayed.

Those listed on this page are identified on their placards as:

- **Attorney:** An attorney in your firm that can be associated to a case or be served a case filing (assuming service has been specified for the filing or bundle).
- **Self-Represented Party:** A self-represented filer.
- **Contact:** Any person that can be selected to be served a case filing (assuming service has been specified for the filing or bundle). Contacts may include employees, clients, and firm staff.
- **Login User:** Any person who can log on to a firm's TrueFiling site and submit filings.
- **Admin:** A member of a firm's TrueFiling Law Firm site that is responsible for:
  - Inviting / managing Login Users
  - Managing court favorites
  - Managing payment accounts
  - Managing firm settings

NOTE: The **Unclassified** section lists existing Login Users whose roles and responsibilities must be updated by an administrator. See the *TrueFiling Administrator Guide* for details on managing Login Users.

Managing Contacts

A contact is a member of the firm's TrueFiling community that can be selected for service (if e-service is specified) for a bundle.

You can add a new contact for your firm, add a new contact for your firm and associate them to a case, add an existing firm contact to a case, remove a contact from a case, and remove a contact from the firm (this functionality is available only to Firm administrators). You can also add an opposing counsel as a case contact.

It is important to understand that a contact is not an attorney. An attorney must be associated with a case. See *Managing Attorneys* later in this section.

Adding a New Contact for your Firm

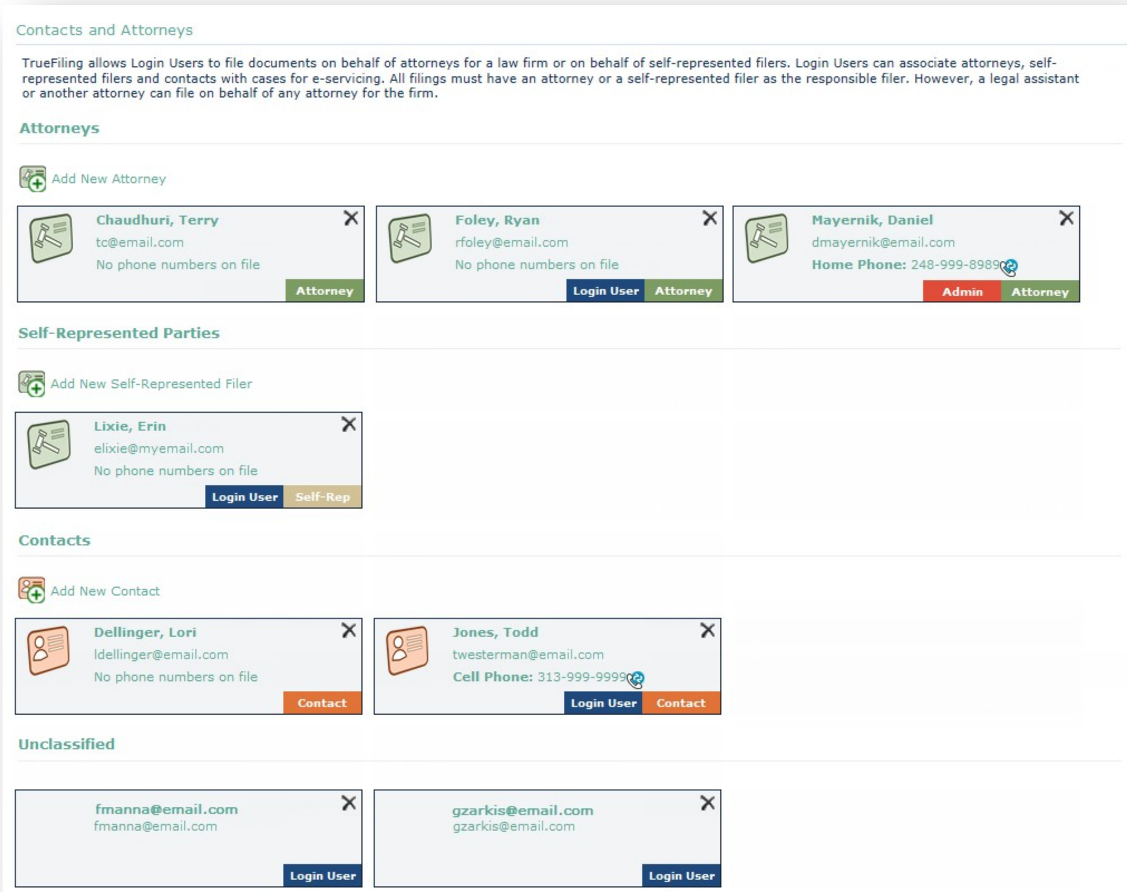
A new contact can be added through:

- The Contacts and Attorneys page (accessed through **Settings >> Contacts and Attorneys** in the navigation pane).
- An existing case – using this method adds a new contact and automatically associates the contact with the case.

Adding a New Contact through Contacts & Attorneys

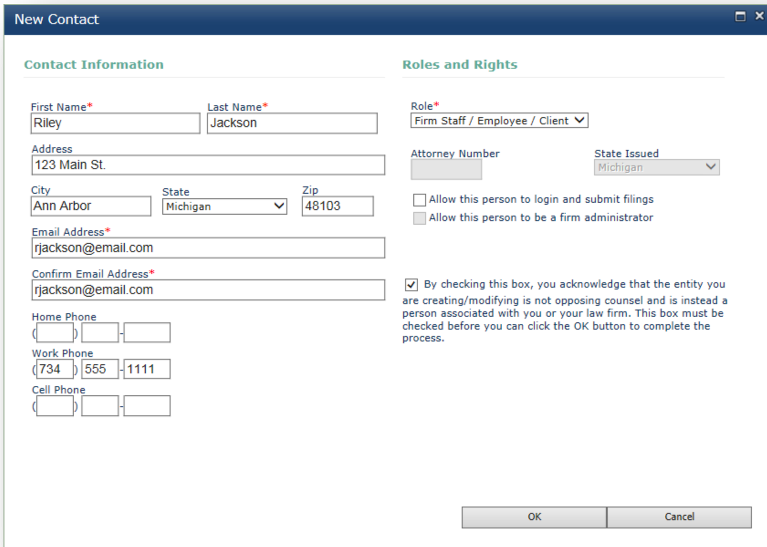
To add a new contact to the firm:

1. Select **Settings >> Contacts & Attorneys** in the navigation pane. The Contacts and Attorneys page is displayed.



2. Review the Contacts section to ensure the contact you want to add does not already exist.

3. Click **Add New Contact**. The New Contact dialog window is displayed.



4. Input the **Contact Information** for the new contact. A red asterisk (*) indicates a required field.
5. Ensure **Firm Staff / Employee / Client** is specified in the **Role** field drop-down list.

   Attorney Number and State Issued are not allowed for a contact so those fields are disabled.

   For Administrators Only

   You can use this form to add a new contact, but you can also use it to issue an invitation to the contact to join your firm's TrueFiling site and enable the contact to submit filings.

   See the *TrueFiling Administrator Guide* for complete details on inviting new users to join the firm and assigning rights.

   If you are not an administrator, the **Allow this person to login and submit filings** and the **Allow this person to be a firm administrator** options are disabled.

6. Select the check box to verify the contact can be added to your firm.

   NOTE: You must select this box to verify this individual is associated with you or your law firm and is not an attorney from the opposing counsel. If the box is not checked, this contact cannot be added.

7. Click **OK** to close the dialog window.

The Contacts and Attorneys page is re-displayed; the new contact will be added.

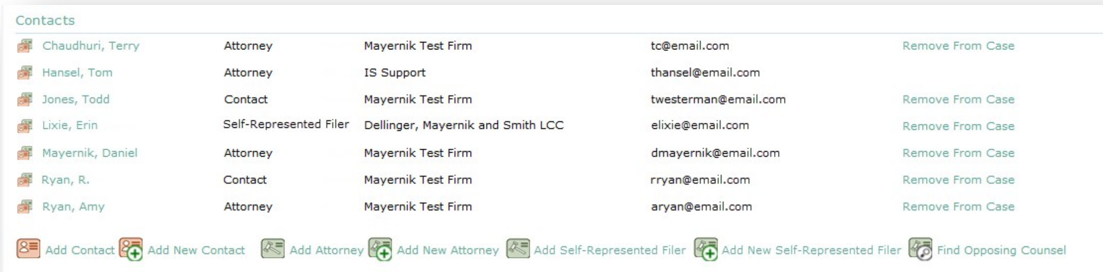
NOTE: The new contact is not yet associated with any case.

Adding a New Contact through an Existing Case

This process will add a new contact and associate that contact to a case.

1. Perform a case search and select the appropriate case from the results returned. Part of the Case Details page is displayed.

   Contacts associated with the case are listed in the Contacts section.

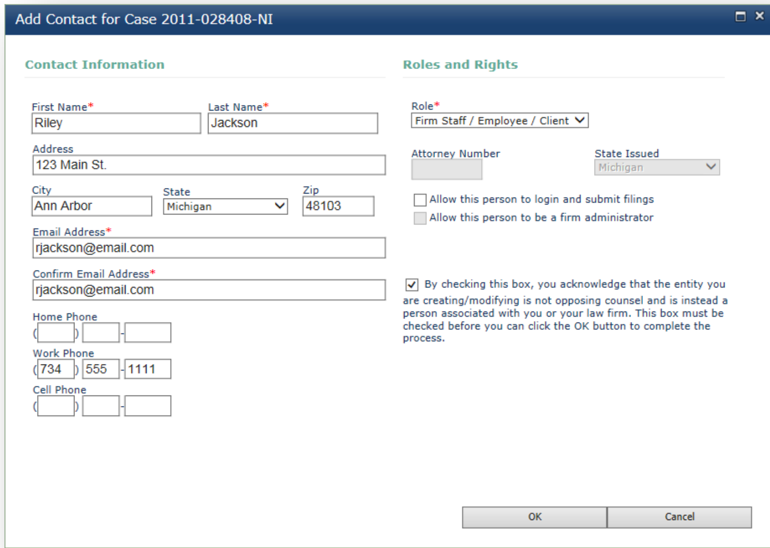


2. Ensure that the new contact is not already a firm contact:

   a. Click **Add Contact** in the Contacts section. The Add Existing Contact dialog window, which lists your firm's contacts who are not associated with the case, is displayed.
      If the contact you want to add is on the list, that contact already exists, and you don't need to add the contact to your firm. Proceed to *Adding an Existing Contact to a Case* later in this section.

   b. If the contact is not on the list, click **Cancel** to close the dialog window. The Case Details page is re-displayed. You can add this new contact to your firm through this page. Proceed to step 3.

3. Click **Add New Contact** in the Contacts section. The New Contact dialog window is displayed. The case number is listed in the dialog window heading.



4. Input the **Contact Information** for the new contact. A red asterisk (*) indicates a required field.
5. Ensure **Firm Staff / Employee / Client** is specified in the **Role** field drop-down list.

   Attorney Number and State Issued are not allowed for a contact so those fields are disabled.

For Administrators Only

You can use this form to add a new contact, but you can also use it to issue an invitation to the contact to join your firm's TrueFiling site and enable the contact to submit filings.

See the *TrueFiling Administrator Guide* for complete details on inviting new users to join the firm and assigning rights.

If you are not an administrator, the **Allow this person to login and submit filings** and the **Allow this person to be a firm administrator** options are disabled.

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6. Select the check box to verify the contact can be added to your firm.

NOTE: You must select the box to verify this individual is associated with you or your law firm and is not an attorney from the opposing counsel. If the box is not checked, this contact cannot be added.

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7. Click **OK** to close the dialog window.

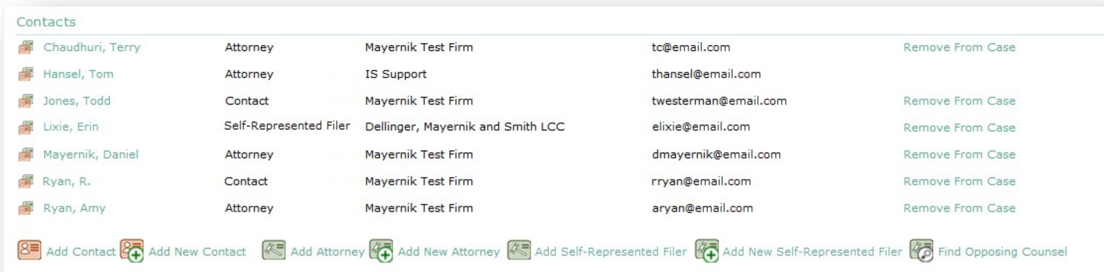
The Case Details page is re-displayed. The new contact is added to the Contacts section <u>and</u> is associated with the case.

In addition, the Contacts and Attorneys list—accessed through **Settings >> Contacts and Attorneys**—is also updated with the new contact. The contact can now be added to other cases. See *Adding an Existing Contact to a Case* below.

Adding an Existing Contact to a Case

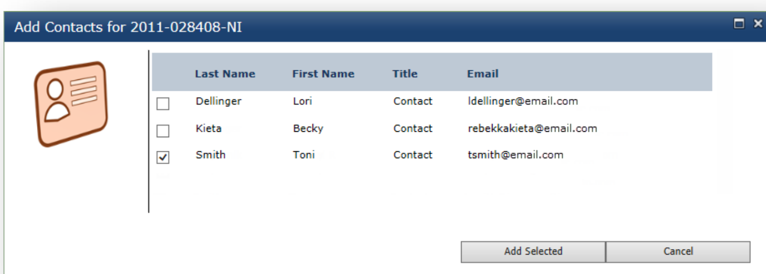
When a contact already exists, and you want to add them to a case:

1. Perform a case search and select the appropriate case from the results returned. The Case Details page is displayed.
2. Review the Contacts section to ensure the contact is not already associated with the case.



3. Click **Add Contact** in the Contacts section.

   The Add Contact dialog window that lists all existing firm contacts who are <u>not</u> associated with the case is displayed.



   NOTE: A message is displayed if no contacts have been added to the case. You must add a contact. See *Adding a New Contact through Contacts and Attorneys* earlier in this section. You can also directly add a contact to this case. See *Adding a New Contact through an Existing Case* earlier in this section.

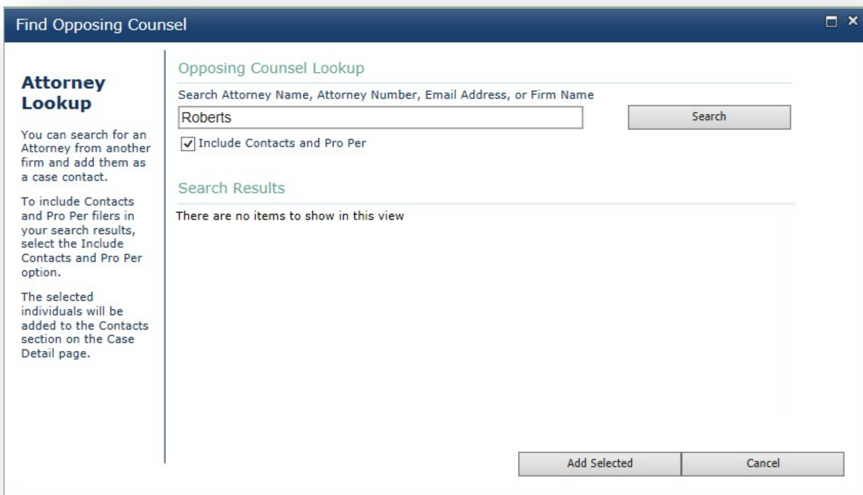
4. Select the check box beside a contact to add. More than one contact can be selected.
5. Click **Add Selected**.

The Case Details page is re-displayed. The selected contact is displayed in the Contacts section, which indicates the contact is now associated with the case.

Adding Opposing Counsel to a Case as a Contact

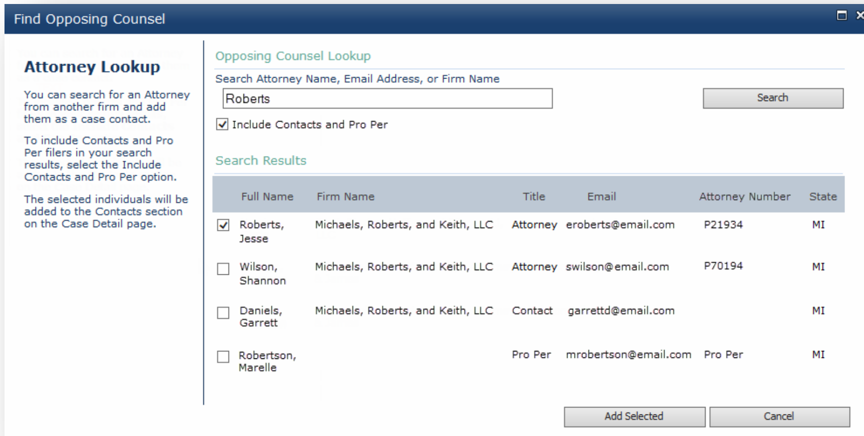
You can add an attorney from another firm as a case contact. This attorney can be selected for servicing for a bundle.

1. Perform a case search and select the appropriate case from the results returned. The Case Details page is displayed.
2. In the Contacts section, click **Find Opposing Counsel**. The following dialog window is displayed.



3. Input the search criteria needed to locate the attorney—attorney name, attorney number, firm name, or email address.
4. If you want to include Contacts and Self-Represented Filers in the search results, select the check box for **Include Contacts and Pro Per**.

5. Click **Search**. The search results are displayed. All instances of the search criteria are listed.

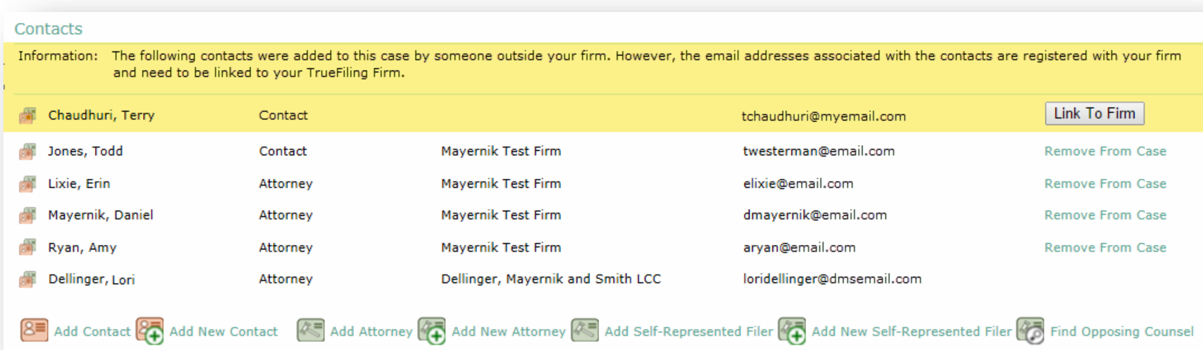


NOTE: Search results are limited to the state in which the Court resides.

6. Select the check box beside the person(s) you want to add to the case as contact(s).
7. Click **Add Selected**. The individuals selected are added to the Contacts section on the Case Details page.

Associating a Court-added Contact to a Case

A case contact can be added by the Court or another law firm. If the email address of this contact is identical to the email address of a member of your firm's site, that person is listed in the Contacts section of the Case Details page in yellow highlight:



In such instances, you'll want to link this person to your firm for this case. Linking will update the person's contact information on the Court's side with the contact information that already exists within your firm's site. This process will ensure that the Court has the most up-to-date contact information for a case contact.

1. Click the **Link To Firm** button.

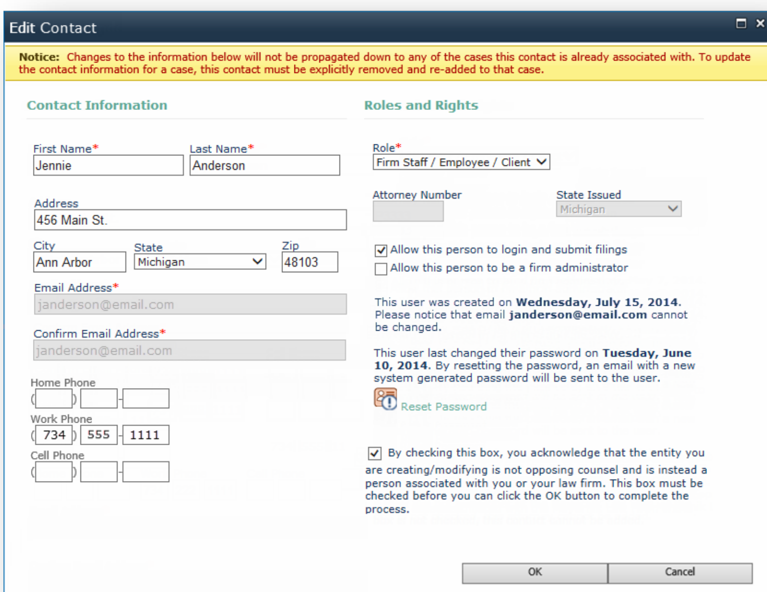
   The contact's information listed in the Contacts sections will reflect the contact information your firm has for them:

Editing a Contact's Information

Contact information and the role assigned to a contact can be edited. If you are an administrator you can also edit login rights and reset a Login User's password.

NOTE: Changes made here are not propagated to other cases with which the contact is associated. You must explicitly remove and re-add this person to the other cases.

1. Select **Settings >> Contacts & Attorneys** in the navigation pane.
2. Locate the contact on the Contacts and Attorneys page.
3. Click the contact's placard. The Edit dialog window for the contact is displayed.



4. Make any required changes to the contact information.

NOTE: You cannot change a user's email address once the user has been created.

5. If required, you can change a user's role. Be aware that if you change a Self-Represented Filer to another role type, the information associated with the filer is removed. A confirmation dialog window is displayed to confirm the change.

   Similarly, you can change an Attorney to another role type. Again, the information associated with the attorney is removed. A confirmation dialog window is displayed to confirm the change.

For Administrators Only
To reset a Login User's password, click **Reset Password** to send the user an email that contains a new system generated password. This process is detailed in the *TrueFiling Administrator Guide*. This option is not visible to non-administrative users.

Indicate if TrueFiling login rights should be granted by selecting (grant) or de-selecting (deny) the box beside the **Allow this person to login and submit filings** option.

Specify whether administrator rights should be granted by selecting (grant) or de-selecting (deny) the box beside the **Allow this person to be a firm administrator** option. This option cannot be selected unless the user has been granted login rights.

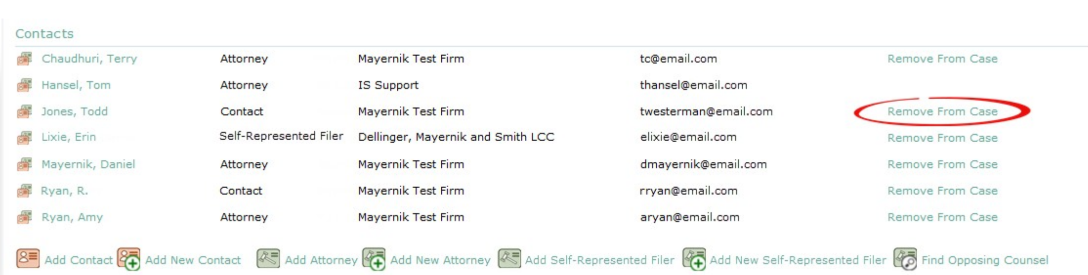
If you are not an administrator, these options are disabled.

6. Click **OK** to close the dialog window and save any edits made. Click **Cancel** to leave the dialog window and not save the changes.

Removing a Contact from a Case

This process will remove a contact from a case but not from the firm:

1. Perform a case search and select the appropriate case from the results returned. Part of the Case Details page is displayed.
2. Locate the contact in the Contacts section.



3. Click the **Remove from Case** option beside the contact to remove.

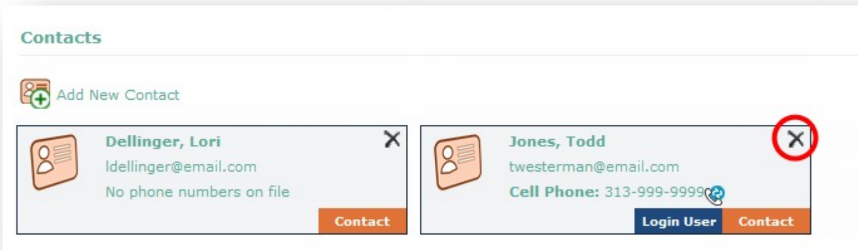
No confirmation dialog window is displayed. The selected contact is simply removed from the case.

Removing a Contact from the Firm

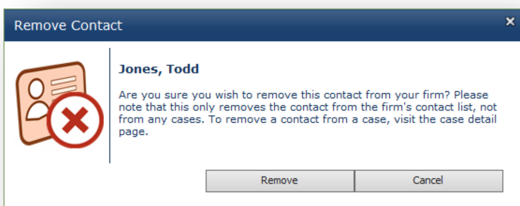
NOTE: This functionality is available only to administrative users.

To remove a contact from the firm:

1. Select **Settings >> Contacts & Attorneys** in the navigation pane. Part of the Contacts and Attorneys page is displayed.



2. Click the **X** in the upper-right corner of the appropriate placard to remove the contact. A confirmation dialog window is displayed.



3. Click **Remove**. The Contacts and Attorneys page is re-displayed; the contact is removed from the firm.

This process will not remove a contact from a case. When the Case Details page is displayed, the contact is identified in the Contacts section as “Removed from Firm.”

See also *Removing a Contact from a Case* earlier in this section.

Managing Attorneys

An attorney is responsible for the filings submitted for a case. You can add a new attorney to your firm, add a new attorney and associate them to a case, associate an existing attorney to a case, remove an attorney from the case, or remove an attorney from the firm.

NOTE: An attorney from your firm must be associated with a case. It is important to recognize that any attorney from another firm you add to the case is considered a contact, NOT the associated attorney.

Adding a New Attorney for your Firm

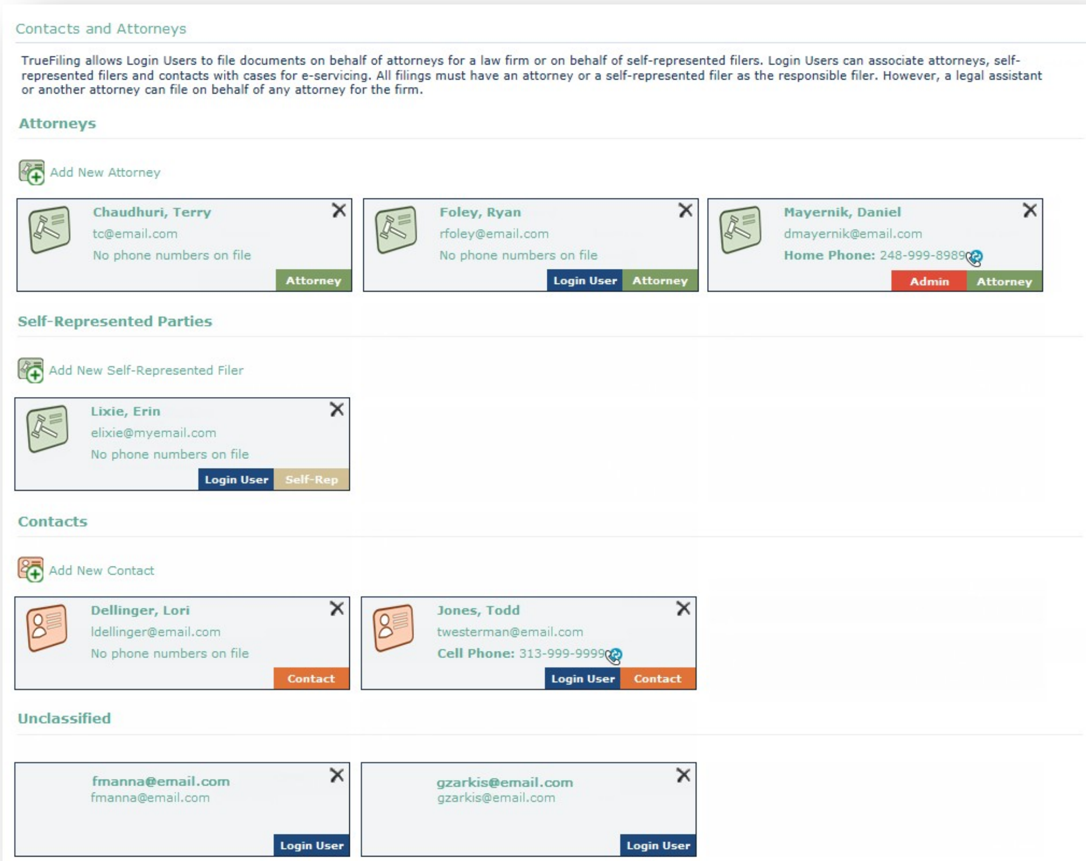
A new attorney can be added to your firm through:

- The Contact and Attorneys option (accessed through **Settings >> Contacts and Attorneys** in the navigation pane).
- An existing case – this method adds a new attorney and automatically associates the attorney with the case.

Adding a New Attorney through Contacts & Attorneys

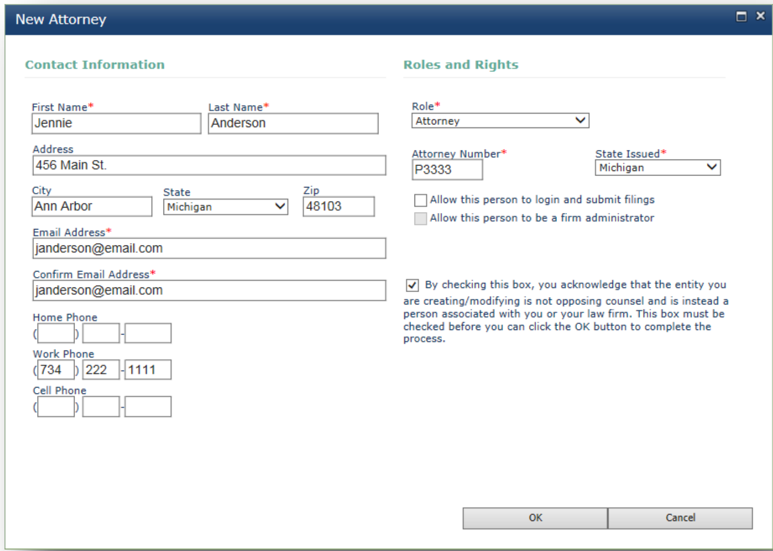
To add a new attorney to the firm:

1. Select **Settings>> Contacts & Attorneys** in the navigation pane. The Contacts and Attorneys page is displayed.



2. Review the list to ensure the attorney you want to add is not already a member of your TrueFiling firm.

3. Click **Add New Attorney**. The New Attorney dialog window is displayed.



4. Input the **Contact Information** for the new attorney. A red asterisk (*) indicates a required field.
5. Ensure **Attorney** is specified in the **Role** field drop-down list.
6. Input the **Attorney Number**.
7. Select the state in which the Attorney Number was issued (**State Issued** field).

For Administrators Only

You can use this form to add a new attorney, but you can also use it to issue an invitation to the attorney to join your firm's TrueFiling site and enable the contact to submit filings.

See the *TrueFiling Administrator Guide* for complete details on inviting new users to join the firm and assigning rights.

If you are not an administrator, the **Allow this person to login and submit filings** and the **Allow this person to be a firm administrator** options are disabled.

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8. Select the check box to verify the attorney is a member of your firm and has rights to file for your firm.

NOTE: You must select the box to verify this individual is associated with you or your law firm and is not an attorney from the opposing counsel. If the box is not checked, this attorney cannot be added.

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9. Click **OK** to close the dialog window.

The Contacts and Attorneys page is re-displayed; the new attorney has been added.

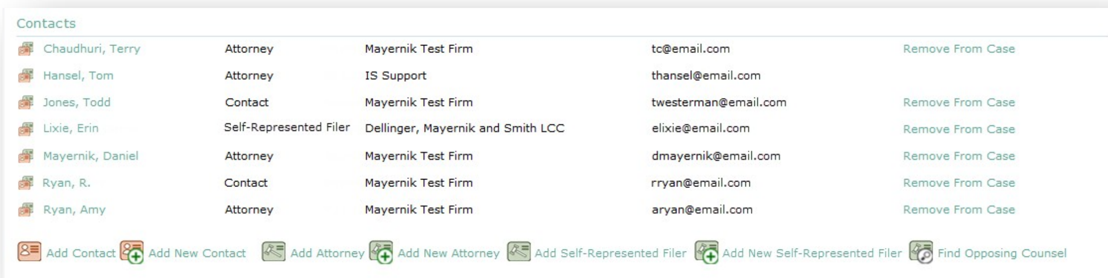
NOTE: The new attorney is not yet associated with any case.

Adding a New Attorney through an Existing Case

This process will add a new attorney and associate the attorney to a case.

1. Perform a case search and select the appropriate case from the results returned. The Case Details page is displayed.

   Attorneys associated with the case are listed in the Contacts section.



2. Ensure the new attorney does not already exist in the Contacts and Attorneys list.

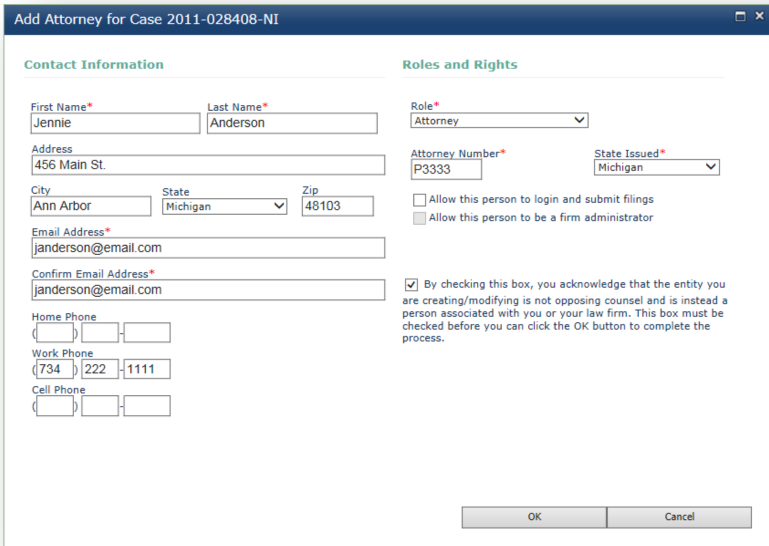
   a. Click **Add Attorney** in the Contacts section. The Add Attorney dialog window, which lists your firm's attorneys who are not associated with the case, is displayed.

      If the attorney you want to add is on the list, that attorney already exists, and you do not need to add him or her to your firm. Proceed to *Adding an Existing Attorney to a Case* later in this section.

   b. If the attorney is not on the list, click **Cancel** to close the dialog window. The Case Details page is re-displayed. You can add the new attorney to your firm through this page. Proceed to step 3.

3. Click **Add New Attorney**.

The New Attorney dialog window is displayed. The case number is listed in the dialog window heading.



4. Input the **Contact Information** for the new attorney. A red asterisk (*) indicates a required field.
5. Ensure **Attorney** is specified in the **Role** field drop-down list.
6. Input the **Attorney Number**.
7. Select the state in which the Attorney Number was issued (**State Issued** field).

For Administrators Only

You can use this form to add a new attorney, but you can also use it to issue an invitation to the attorney to join your firm's TrueFiling site and enable them to submit filings.

See the *TrueFiling Administrator Guide* for complete details on inviting new users to join the firm and assigning rights.

If you are not an administrator, the **Allow this person to login and submit filings** and the **Allow this person to be a firm administrator** options are disabled.

---

8. Select the check box to verify the attorney is a member of your firm and has rights to file for your firm.

NOTE: You must select the box to verify this individual is associated with you or your law firm and is not an attorney from the opposing counsel. If the box is not checked, this attorney cannot be added.

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9. Click **OK** to close the dialog window.

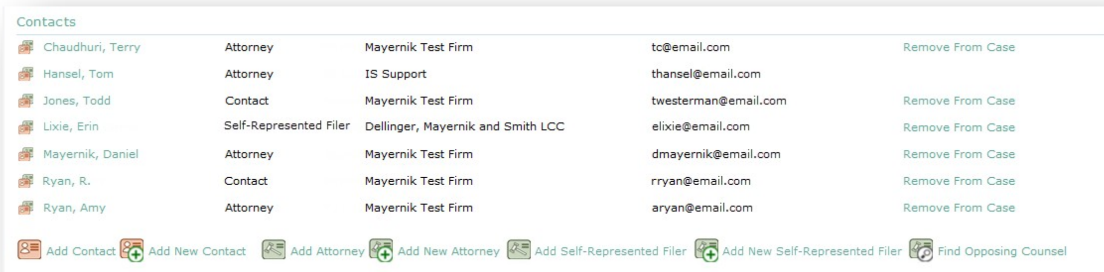
The Case Details page is re-displayed. The new attorney is added to the Contacts section and is associated with the case.

In addition, the Contacts and Attorneys list—accessed through **Settings >> Contacts and Attorneys**—is updated with the new attorney. This attorney can now be associated with other cases. See *Adding an Existing Attorney to a Case* below.

Adding an Existing Attorney to a Case

When an attorney already exists, and you want to add the attorney to a case:

1. Perform a case search and select the appropriate case from the results returned. The Case Details page is displayed.
2. Review the Contacts section to ensure the attorney is not already associated with the case.



3. In the **Contacts** section, click **Add Attorney**.

   The Add Attorney dialog windowthat lists all existing attorneys who are <u>not</u> associated with the case is displayed.

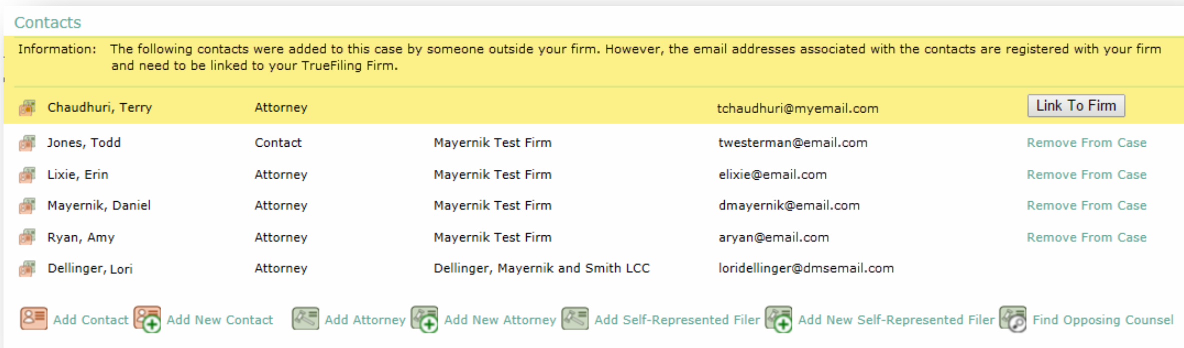
   NOTE: A message is displayed if no attorneys have been added to the case. You must add an attorney. See *Adding a New Attorney through Contacts and Attorneys* earlier in this section. You can also directly add an attorney to this case. See *Adding a New Attorney through an Existing Case* earlier in this section.

4. Select the check box beside the attorney to add. More than one can be selected.
5. Click **Add Selected**.

The Case Details page is re-displayed. The selected attorney is displayed in the Contacts section, which indicates the attorney is now associated with this case.

Associating a Court-added Attorney to a Case

An attorney can be added as a case contact by the Court or another law firm. If the email address of this attorney is identical to the email address of a member of your firm's site, it will be listed in the Contacts section of the Case Details page in yellow highlight as:



In such instances, you'll want to link this attorney to your firm for this case. Linking will update the attorney's contact information on the Court's side with the contact information that already exists within your firm's site for this attorney. This process will ensure that the Court has the most up-to-date contact information for a case contact.

1. Click the **Link To Firm** button.

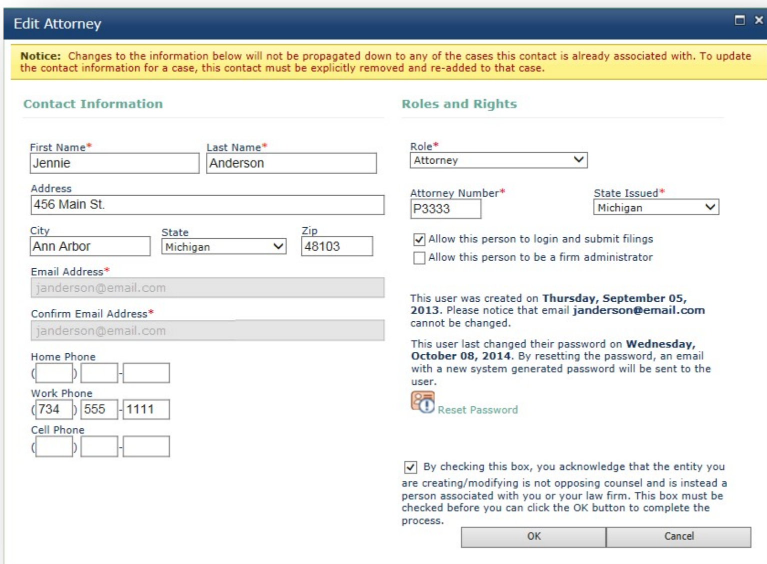
   The attorney information listed in the Contacts sections will reflect the contact information your firm has:

Editing an Attorney's Information

Contact information and the role assigned to an attorney can be edited. If you are an administrator you can also edit login rights and reset a Login User's password.

NOTE: Changes made here are not propagated to other cases this attorney is associated with. You must explicitly remove and re-add this person to the other cases.

1. Select **Settings >> Contacts & Attorneys** in the navigation pane.
2. Locate the attorney on the Contacts and Attorneys page.
3. Click the attorney's placard. The Edit dialog window is displayed.



4. Make any required changes to the contact information.

NOTE: You cannot change a user's email address once the user has been created.

5. If required, you can change a user's role. Be aware that if you change a Self-Represented Filer to another role type, the information associated with the filer is removed. A confirmation dialog window is displayed to confirm the change.

   Similarly, you can change an Attorney to another role type. Again, the information associated with the attorney is removed. A confirmation dialog window is displayed to confirm the change.

For Administrators Only

To reset a Login User's password, click **Reset Password** to send the user an email that contains a new system generated password. This process is detailed in the *TrueFiling Administrator Guide*. This option is not visible to non-administrative users.

Indicate if TrueFiling login rights should be granted by selecting (grant) or de-selecting (deny) the box beside the **Allow this person to login and submit filings** option.

Specify whether administrator rights should be granted by selecting (grant) or de-selecting (deny) the box beside the **Allow this person to be a firm administrator** option. This option cannot be selected unless the user has been granted login rights.

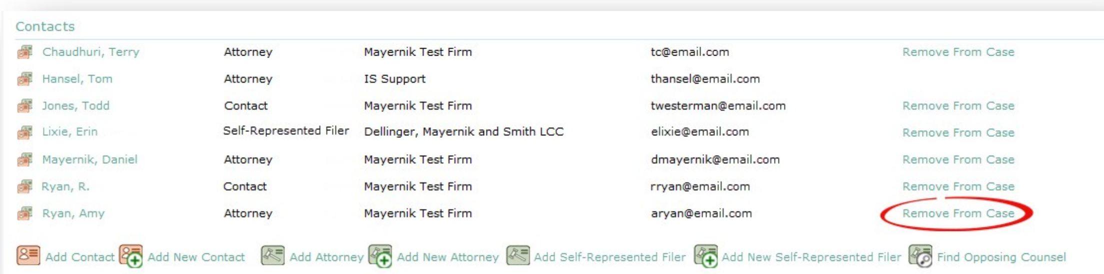
If you are not an administrator, these options are disabled.

6. Click **OK** to close the dialog window and save any edits made. Click **Cancel** to leave the dialog window and not save the changes.

Removing an Attorney from a Case

This process will remove an attorney from a case but not from the firm:

1. Perform a case search and select the appropriate case from the results returned. Part of the Case Details page is displayed.
2. Locate the attorney in the Contacts section.



3. Click the **Remove from Case** link beside the attorney to remove.

No confirmation dialog window is displayed. The selected attorney is removed from the case.

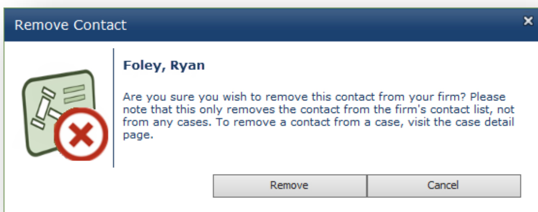
Removing an Attorney from the Firm

NOTE: This functionality is available only to administrative users.

To remove an attorney from the firm:

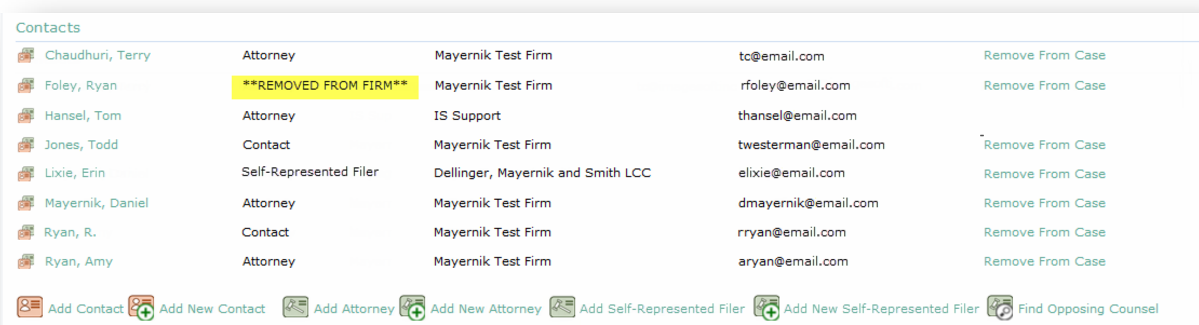
1. Select **Settings >> Contacts & Attorneys** in the navigation pane. Part of the Contacts and Attorneys page is displayed.

2. Click the **X** in the upper-right corner of the appropriate placard to remove the attorney. A confirmation dialog window is displayed.



3. Click **Remove**. The Contacts section is re-displayed; the attorney is removed.

This process will not remove an attorney from a case. When the Case Details page is displayed, the attorney is identified in the Contacts section as “Removed from Firm”:



See also *Removing an Attorney from a Case* earlier in this section.

Managing Self-Represented Filers

A self-represented filer is a term used to identify a person who chooses to represent himself/herself in a legal action instead of using an attorney.

Adding a New Self-Represented Filer to a Firm

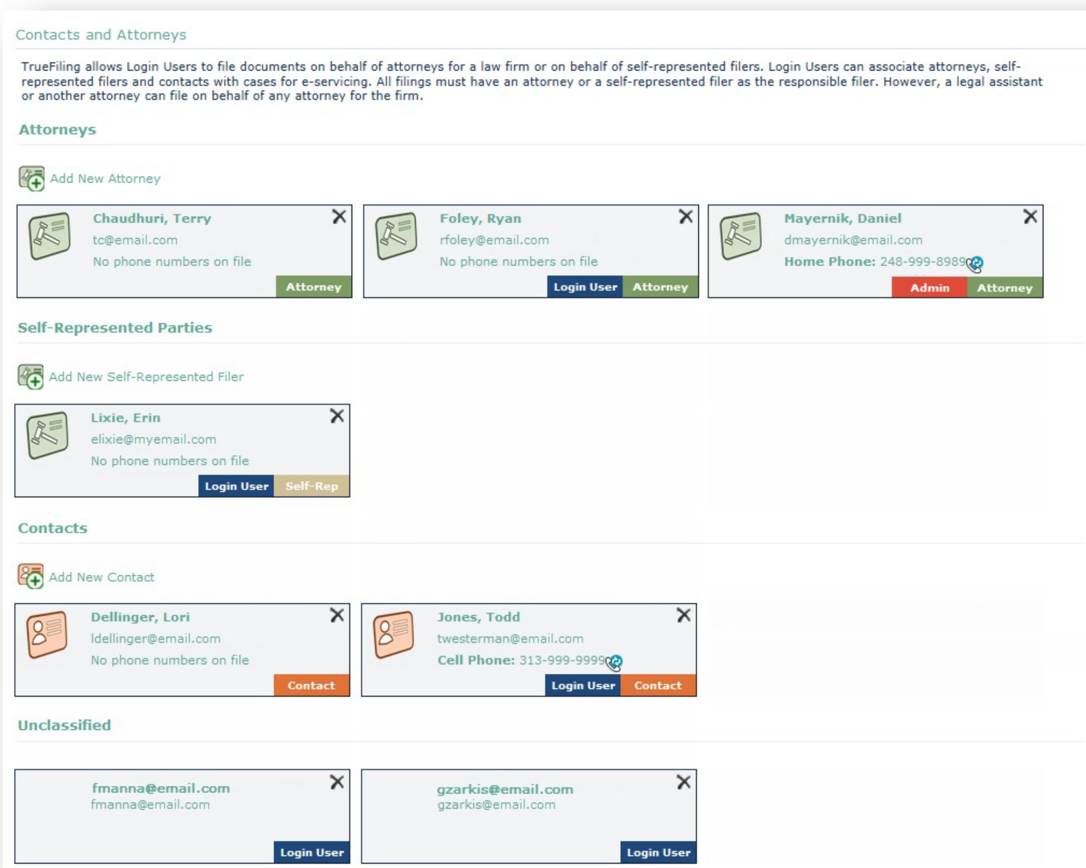
A new self-represented filer can be added to a firm through:

- The Contact and Attorneys option (accessed through **Settings >> Contacts and Attorneys** in the navigation pane).
- An existing case – this method adds the new self-represented filer and associates the filer with the case.

Adding a Self-Represented Filer through Contacts & Attorneys

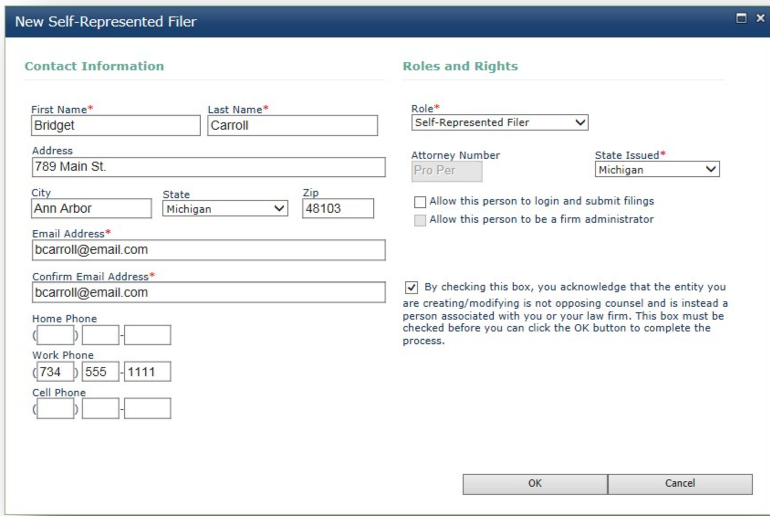
To add a self-represented filer to a firm:

1. Select **Settings >> Contacts & Attorneys** in the navigation pane. The Contacts and Attorneys page is displayed.



2. Review the Self-Represented Filer section to ensure the filer does not already exist.

3. Click **Add New Self-Represented Filer**. The following dialog window is displayed.



4. Input the **Contact Information** for the new filer. A red asterisk (*) indicates a required field.
5. Ensure **Self-Represented Filer** is specified in the **Role** field drop-down list. The **Attorney Number** defaults to Pro Per and cannot be edited.

6. Select the filer's state from **State Issued** field drop-down list.

For Administrators Only

You can use this form to add a new self-represented filer, but you can also use it to issue an invitation to the filer to join a firm's TrueFiling site and enable the filer to submit filings.

See the *TrueFiling Administrator Guide* for complete details on inviting new users to join a firm and assigning rights.

If you are not an administrator, the **Allow this person to login and submit filings** and the **Allow this person to be a firm administrator** options are disabled.

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7. Select the check box to verify this individual has the right to file documents with the Court.

NOTE: You must select the box to verify this individual is associated with you or your law firm and is not an attorney from the opposing counsel. If the box is not checked, this filer cannot be added.

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8. Click **OK** to close the dialog window.

The Contacts and Attorneys page is re-displayed; the new filer has been added to the Self-Represented Filers section.

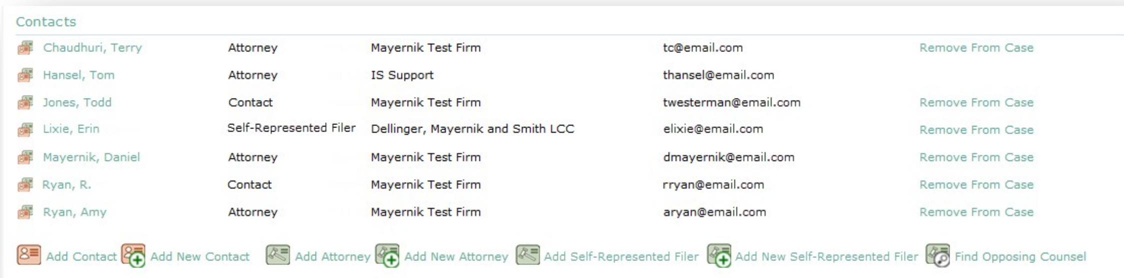
NOTE: The new filer is not yet associated with any case.

Adding a New Self-Represented Filer through an Existing Case

This process will add a new self-represented filer and associate them to a case.

1. Perform a case search and select the appropriate case from the results returned. Part of the Case Details page is displayed.

   Attorneys, contacts, and self-represented filers associated with the case are listed in the Contacts section.



Contacts

Chaudhuri, Terry	Attorney	Mayernik Test Firm	tc@email.com	Remove From Case
Hansel, Tom	Attorney	IS Support	thansel@email.com	
Jones, Todd	Contact	Mayernik Test Firm	twesterman@email.com	Remove From Case
Lixie, Erin	Self-Represented Filer	Dellinger, Mayernik and Smith LCC	elixie@email.com	Remove From Case
Mayernik, Daniel	Attorney	Mayernik Test Firm	dmayernik@email.com	Remove From Case
Ryan, R.	Contact	Mayernik Test Firm	rryan@email.com	Remove From Case
Ryan, Amy	Attorney	Mayernik Test Firm	aryan@email.com	Remove From Case

Add Contact   Add New Contact   Add Attorney   Add New Attorney   Add Self-Represented Filer   Add New Self-Represented Filer   Find Opposing Counsel

2. Ensure the new filer does not already exist in the Contacts and Attorneys list.

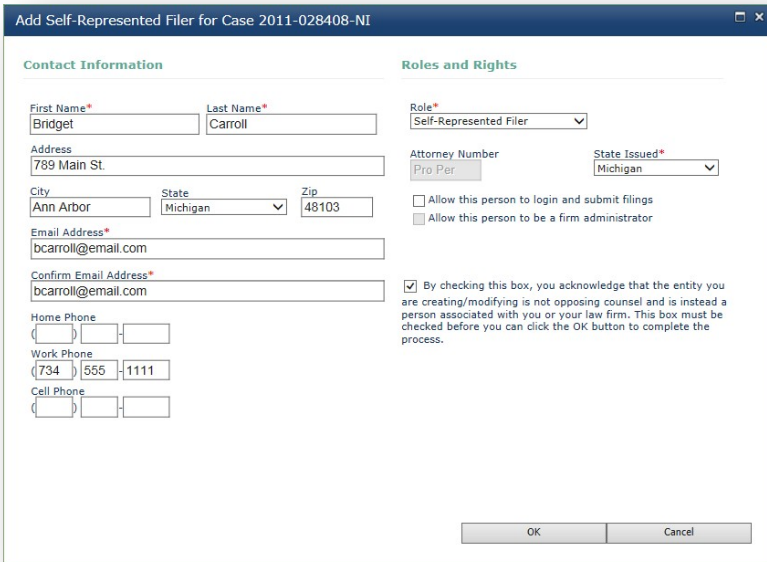
   a. Click **Add Self-Represented Filer** in the Contacts section. A dialog window, which lists the firm's self-represented filers who are not associated with the case, is displayed.

      If the filer you want to add is on the list, that filer already exists, and you do not need to add him or her. Proceed to *Adding an Existing Self-Represented Filer to a Case* later in this section.

   b. If the filer is not on the list, click **Cancel** to close the dialog window. The Case Details page is re- displayed. You can add the new filer to a firm through this page. Proceed to step 3.

3. Click **Add New Self-Represented Filer**.

The New Self-Represented Filer dialog window is displayed. The case number is in the dialog window heading.



4. Input the **Contact Information** for the new filer. A red asterisk (*) indicates a required field.
5. Ensure **Self-Represented Filer** is specified in the **Role** field drop-down list. The **Attorney Number** defaults to Pro Per and cannot be edited.

6. Select the filer's state from **State Issued** field drop-down list.

For Administrators Only
You can use this form to add a new self-represented filer, but you can also use it to issue an invitation to the filer to join the firm's TrueFiling site and enable him or her to submit filings.

See the *TrueFiling Administrator Guide* for complete details on inviting new users to join a firm and assigning rights.

If you are not an administrator, the **Allow this person to login and submit filings** and the **Allow this person to be a firm administrator** options are disabled.

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7. Select the check box to verify the filer has rights to file documents with the Court.

NOTE: You must select the box to verify this individual is associated with you or your law firm and is not an attorney from the opposing counsel. If the box is not checked, this filer cannot be added.

---

8. Click **OK** to close the dialog window.

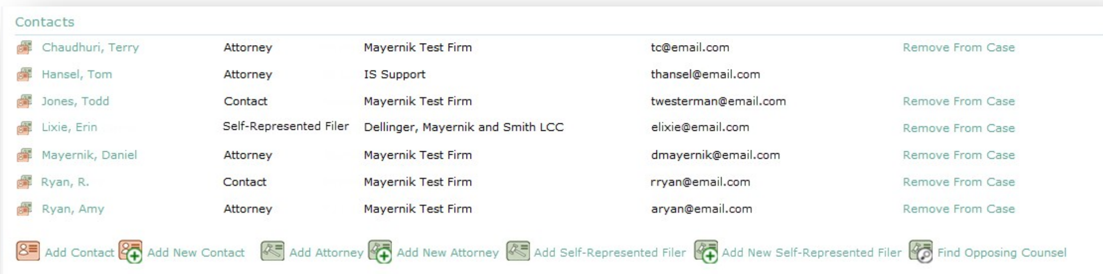
The Case Details page is re-displayed. The new filer is added to the Contacts section and is associated with the case.

In addition, the Contacts and Attorneys list—accessed through **Settings >> Contacts and Attorneys—**is updated with the new filer, who can now be associated with other cases. See *Adding an Existing Self-Represented Filer to a Case* below.

Adding an Existing Self-Represented Filer to a Case

When a self-represented filer already exists, and you want to add the filer to a case:

1. Perform a case search and select the appropriate case from the results returned. The Case Details page is displayed.
2. Review the Contacts section to ensure the filer is not already associated with the case.



3. In the **Contacts** section, click **Add Self-Represented Filer**.

   A dialog window that lists all existing self-represented filers who are <u>not</u> associated with the case is displayed.

NOTE: A message is displayed if no self-represented filers have been added to the case. You must return to the Case Details page and add a self-represented filer. See *Adding a New Self-Represented Filer through Contacts and Attorneys* earlier in this section. You can also directly add a self-represented filer to this case. See *Adding a New Self-Represented Filer through an Existing Case* earlier in this section.

4. Select the check box beside the filer to add. More than one can be selected.
5. Click **Add Selected**.

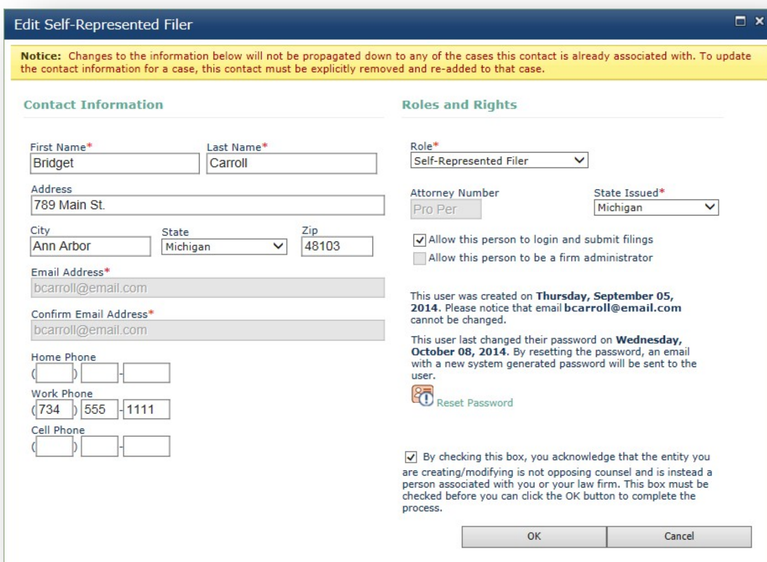
The Case Details page is re-displayed. The selected filer is displayed in the Contacts section, which indicates the filer is now associated with this case.

Editing a Self-Represented Filer's Information

Contact information and the role assigned to a self-represented filer can be edited. If you are an administrator you can also edit login rights and reset a Login User's password.

NOTE: Changes made here are not propagated to other cases the fileris associated with. You must explicitly remove and re-add this person to the other cases.

1. Select **Settings >> Contacts & Attorneys** in the navigation pane.
2. Locate the self-represented filer on the Contacts and Attorneys page.
3. Click the filer's placard. The Edit dialog window is displayed.



4. Make any required changes to the contact information.

NOTE: You cannot change a user's email address once the user has been created.

5. If required, you can change a user's role. Be aware that if you change a Self-Represented Filer to another role type, the information associated with the filer is removed. A confirmation dialog window is displayed to confirm the change.

For Administrators Only

To reset a Login User's password, click **Reset Password** to send the user an email that contains a new system generated password. This process is detailed in the *TrueFiling Administrator Guide*. This option is not visible to non-administrative users.

Indicate if TrueFiling login rights should be granted by selecting (grant) or de-selecting (deny) the box beside the **Allow this person to login and submit filings** option.

Specify whether administrator rights should be granted by selecting (grant) or de-selecting (deny) the box beside the **Allow this person to be a firm administrator** option. This option cannot be selected unless the user has been granted login rights.

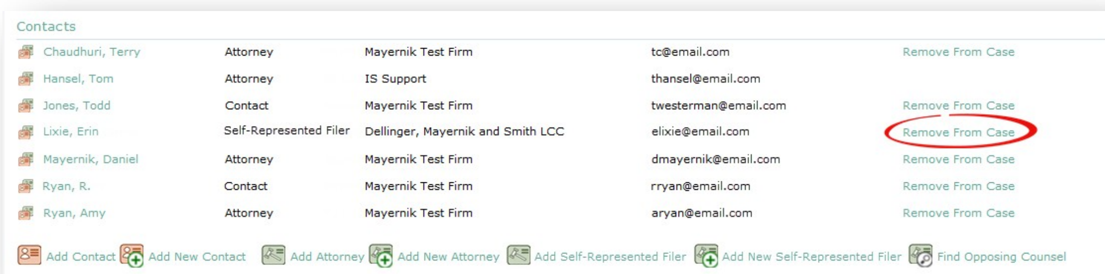
If you are not an administrator, these options are disabled.

6. Click **OK** to close the dialog window and save any edits made. Click **Cancel** to leave the dialog window and not save the changes.

Removing a Self-Represented Filer from a Case

This process will remove a self-represented filer from a case but not from the firm:

1. Perform a case search and select the appropriate case from the results returned. Part of the Case Details page is displayed.
2. Locate the filer in the Contacts section.



3. Click the **Remove from Case** link beside the filer to remove.

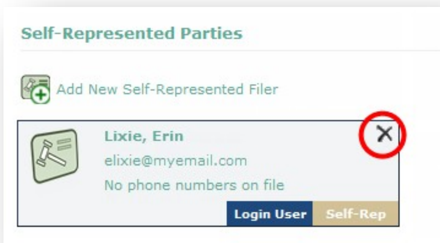
No confirmation dialog window is displayed. The selected filer is simply removed from the case.

Removing a Self-Represented Filer from the Firm

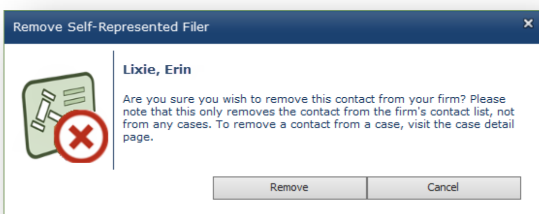
NOTE: This functionality is available only to administrative users.

To remove a self-represented filer from the firm:

1. Select **Settings >> Contacts & Attorneys** in the navigation pane. Part of the Contacts and Attorneys page display is displayed.

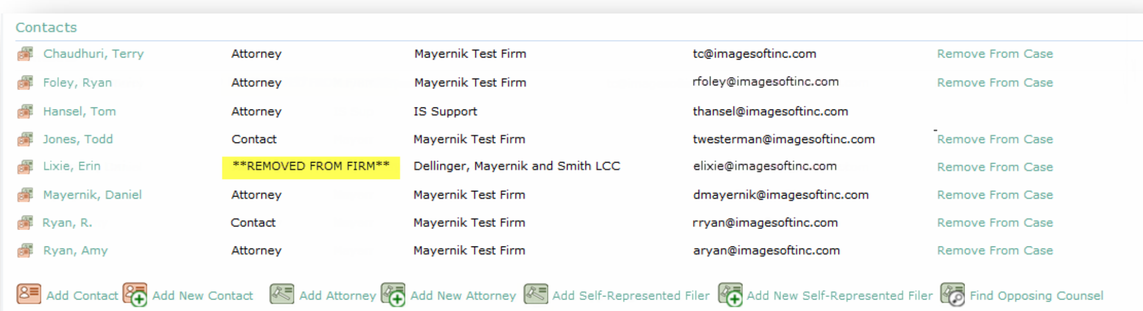


2. Click the **X** in the upper-right corner of the appropriate placard to remove the filer. A confirmation dialog window is displayed.



3. Click **Remove**. The Contacts section is re-displayed; the filer is removed from the firm.

This process will not remove the filer from a case. However, when the Case Details page is displayed, the filer is identified in the Contacts section as "Removed from Firm":



See also *Removing a Self-Represented Filer From a Case* earlier in this section.

