

Michigan Appellate Assigned Counsel System

Fall Training

October 15, 2015

**E-Filing: Creating Appendices,
Bookmarking, Filing**

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Michigan Commission on Law Enforcement Standards**

Order

**Michigan Supreme Court
Lansing, Michigan**

November 26, 2014

Robert P. Young, Jr.,
Chief Justice

ADM File No. 2002-37

Michael F. Cavanagh
Stephen J. Markman

Administrative Order No. 2014-23

Mary Beth Kelly

Brian K. Zahra

E-filing System for the
Michigan Supreme Court and
the Michigan Court of Appeals

Bridget M. McCormack

David F. Viviano,
Justices

On order of the Court, effective immediately, the Michigan Supreme Court (MSC) and the Michigan Court of Appeals (COA) are authorized to implement an electronic filing and electronic service system.

Although the Court of Appeals has had an e-filing system available for several years, this new system by ImageSoft, Inc., called TrueFiling, will enable filers to e-file documents with either the MSC or COA. The TrueFiling system allows for initiating a new case or e-filing a document into an existing case. The system is designed to maximize ease of its use and promote utility for e-filers, whether they are attorneys or self-represented litigants.

Under this system, e-filing will initially be voluntary for filers in all case types, but the Court anticipates that e-filing will eventually become mandatory in both courts. The experience gained from this voluntary program will help determine the future parameters of an expected mandatory program.

Although this order sets out the manner in which e-filed documents are submitted to the courts or served on other parties to an action, it does not change the time periods required for taking action under the Michigan Court Rules, except as explicitly provided.

I. Definitions

For purposes of this order:

- (A) “Authorized user” means a party, a party’s attorney, or court staff who is registered in the TrueFiling system (www.truefiling.com) and who has satisfied the requirements imposed by the courts relating to electronic filing and service procedures. A court may revoke user authorization for good cause as determined

by the court, including but not limited to a security breach or failure to comply with system requirements. An authorized user must notify the court and ImageSoft, Inc., of any change in the authorized user's firm name, delivery address, telephone number, fax number, e-mail address, or other required registration information. This notice must occur as soon as practicable but no later than 7 days after the effective date of the change.

- (B) "Electronic filing" or "e-filing" means the completed electronic transmission of documents or information to the court.
- (C) "Electronic notice/notification" or "e-notice/notification" means the electronic transmission of documents or information from the court.
- (D) "Electronic service" or "e-service" means the electronic transmission of documents or information to a party, a party's attorney, or a party's representative.

II. Scope

- (A) Consistent with the Michigan Court Rules and the provisions of this order, the MSC and the COA may:
 - (1) accept electronic filing and permit electronic service of documents from authorized users, except as provided in subsection (B) below;
 - (2) issue electronic filing guidelines consistent with this order. The guidelines must be posted prominently on the courts' electronic filing website; or
 - (3) electronically issue, file, and serve notices, orders, opinions, and other documents, subject to the provisions of this order.

Filers need not provide hard copies to the courts, as otherwise required by the court rules, of documents that are electronically filed.

- (B) Registered users agree to accept e-service through the TrueFiling system unless and until the user's registration is terminated. Service on nonregistered users must be accomplished in a manner allowed under the court rules, such as by first-class mail, hand delivery, or e-mail under MCR 2.107(C)(4).

III. Signatures

- (A) A document electronically filed or electronically served under this order shall be deemed to have been signed by the party, the party's attorney, or the declarant for all purposes provided in the Michigan Court Rules. A statutory or court rule

requirement for an original signature in a document is satisfied by inserting a typed signature with “/s/ [Name]” or a graphic image of a handwritten signature, including an actual signature on a scanned document. A digital signature that authenticates digital information through computer cryptography may not be used.

- (B) A document containing the signature of a third party (e.g., affidavits, stipulations) may also be filed electronically by indicating that the signed original is maintained by the filing party. Signed copies shall be provided to the parties or court upon request.

IV. Retention of Documents

Unless otherwise ordered by the court, copies of all documents electronically filed or served shall be maintained by the party filing those documents and shall be made available, upon reasonable notice, for inspection or copying. Parties shall retain such copies until final disposition of the case and the expiration of all appeal opportunities.

V. Official Case Record

The electronically filed documents maintained on the courts’ servers are the official record of the court.

VI. Payment of Filing Fees and Costs

- (A) A filing fee is due and payable at the time of the transmission of the electronic document unless:
 - (1) the document type does not require a fee;
 - (2) the filing is accompanied by a motion to waive fees;
 - (3) the fee is waived by the court pursuant to statute or court rule; or
 - (4) payment is deferred pending an interagency transfer of funds.

Failure to timely pay a filing fee may result in the filing being rejected by the court.

- (B) Fees and costs are paid electronically through the TrueFiling system.

VII. Transmission Failures and System Outages

- (A) In the event of a transmission failure of an electronically filed document, a party may file a motion requesting that the court enter an order permitting a document to be deemed filed *nunc pro tunc* on the date of the unsuccessful transmission. The moving party must prove to the court's satisfaction that:
 - (1) the transmission was attempted on the date and at the time asserted by the party;
 - (2) the transmission failed because of the failure of the TrueFiling system to process the electronic document or because of the court's computer system's failure to receive the document; and
 - (3) the transmission failure was not caused, in whole or in part, by the action or inaction of the party.
- (B) Scheduled system outages, such as for system maintenance, shall be posted on the court and TrueFiling websites and will be scheduled before 9:00 a.m. or after midnight on business days whenever feasible.
- (C) Notice will be provided on the court and TrueFiling websites if the TrueFiling system becomes unavailable for an extended or uncertain period. The notice shall indicate whether filers are responsible for filing the documents conventionally in order to meet the deadlines imposed by statute or court rule.

VIII. Filing Completion

- (A) A document filed electronically shall be considered filed with the court when the transmission to the TrueFiling system is complete and the system reflects a "Filed" status.
- (B) If the court rejects an e-filed document pursuant to court rule, the court shall notify the filer of the rejection and the document shall not become part of the official court record.
- (C) Upon completion of an e-filing transmission to the TrueFiling system, the system shall issue to the filer and to the court a notification that includes the date and time of the transmission.

IX. Time for Filing

Filings may be transmitted to the TrueFiling system twenty-four hours a day, seven days a week (with the exception of the system's downtime required for periodic maintenance). However, a document electronically filed or served after 11:59 p.m. Eastern Time, or on

a Saturday, Sunday, or court holiday (see MCR 8.110[D][2]) shall be deemed to have been filed or served on the next business day. See MCR 1.108.

X. Format of Documents

The TrueFiling system accepts the following file types for e-filed documents: Microsoft Word (DOC and DOCX), PDF, text files (TXT), images such as a TIFF, PNG or JPG. The courts strongly prefer that original pleadings be submitted as Word documents, text files, or searchable PDFs. Nonoriginal documents may be scanned into PDF as nonsearchable images.

Staff Comment: Administrative Order No. 2014-23 authorizes implementation and sets out the basic requirements for voluntary e-filing in the Michigan Supreme Court and Michigan Court of Appeals.

The staff comment is not an authoritative construction by the Court.



I, Larry S. Royster, Clerk of the Michigan Supreme Court, certify that the foregoing is a true and complete copy of the order entered at the direction of the Court.

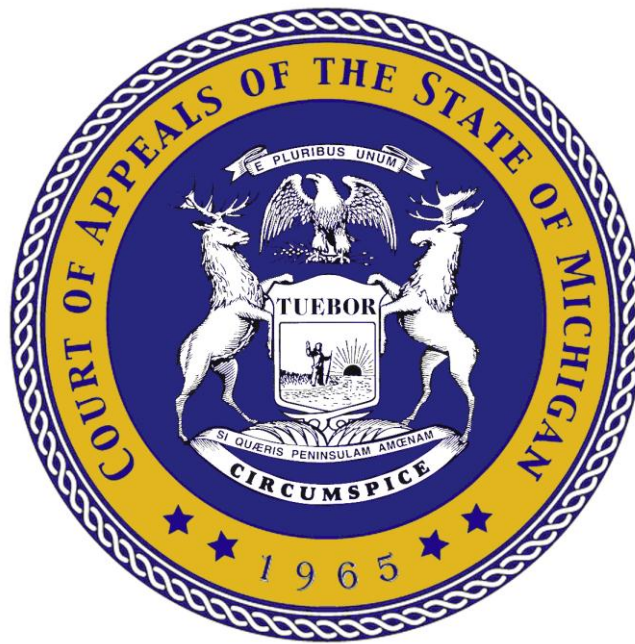
November 26, 2014

A handwritten signature in black ink, appearing to read "Larry S. Royster", is written over a horizontal line.

Clerk

Michigan Court of Appeals

Preparing a PDF Document For Electronic Filing



April 2013

Preparing a PDF Document for Electronic Filing at the Michigan Court of Appeals

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*The following instructions offer guidelines for PDF best practices to assist you
in creating documents that are both acceptable and useful
at the Michigan Court of Appeals.*

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Note About Word Processing and PDF Creation Software

We have created these general instructions using Word 2007/2010 and Adobe Acrobat 9.0. All screenshots are from these environments. While the concepts are applicable across word processors and PDF conversion software, you may need to adapt the directions for your particular word processor and the version of Acrobat or other PDF conversion software that you are using. In that case, the name and location of menu options referenced herein may not be accurate. In addition to Adobe, many other vendors provide software to create PDF documents. Please note that the Court does not endorse or recommend any specific PDF software. Because there are so many different applications, and we could not depict instructions for all, we have chosen to depict our instructions with reference to Adobe Acrobat.

Thank You

Thank you for your PDF document preparation efforts. We are confident that incorporating these essential steps into your regular habits will help you create useful PDF documents that will greatly benefit Court of Appeals judges and staff attorneys, as well as others who receive your electronically served documents. It is likely that you will also find these techniques of value in your day-to-day work processes.

What is a Court-Friendly PDF Document?

Documents created for the Court must be converted to Portable Document Format (PDF) prior to filing electronically with the Court. If you attempt to submit a non-PDF file through the e-filing system, you will receive an error message and the document will be rejected. PDF format is required because PDF documents retain the pagination, layout, formatting, graphics and fonts of the original document. The document will look the same no matter what type of computer is used to view it or what printer is used to print it.

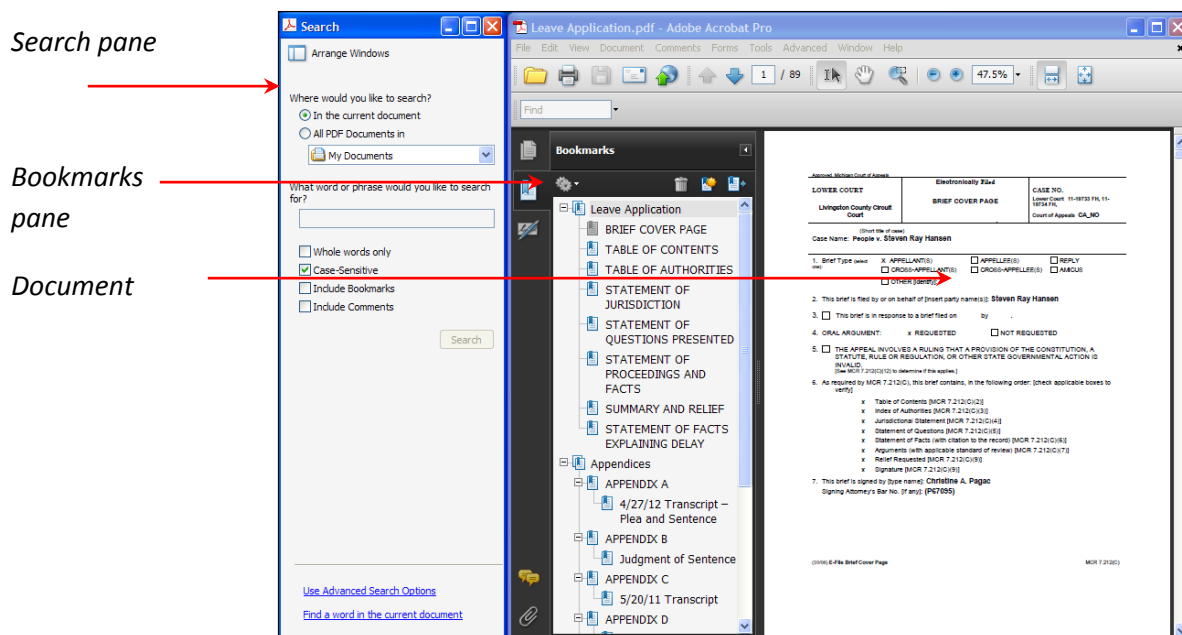
As we transition to a world with less printed paper and more online viewing of documents at the Court of Appeals, we offer the following suggestions for formatting your documents to make them more useful to our Judges, law clerks, and research attorneys.

Create a Searchable Document

The Court prefers to receive documents in searchable PDF format when they are original appeal pleadings. PDF documents that are created from electronic files, such as word-processing documents, automatically include searchable text. On the other hand, scanning a printed document into PDF format often creates only a graphic image of the document, which is not searchable. (This depends on the equipment and settings used to scan.) Appendices to pleadings will often be scanned images.

Create a Document that is Easy to Navigate

Use Bookmarks. The Court requests that PDF files include bookmarks to serve as a navigational aid. Bookmarks provide a table of contents and usually represent the major sections in a document. When you create bookmarks in a document, they appear in the navigation panel. Anyone viewing the file can click a bookmark to navigate to the specified location within the PDF document.



Use Hyperlinks. Hyperlinks are another feature that can make it easier to navigate in documents. *Internal* hyperlinks, which point to other places within the same document, are permissible. However, *external* links, which point to other documents, websites or legal sources, must be avoided in documents submitted through the e-filing system. Use of *external* links can result in format errors that prevent your document from being accepted by the system.

Create an Optimized Document

Optimizing means to create the best quality document at the most efficient file size. Reducing the file size of PDF documents improves their performance. PDF optimization is an important step when creating PDF files. Each of these concepts is discussed in detail below.

An Overview PDF Document Types

Filers or their support staff will prepare required pleadings, forms, or appendices as detailed in the Court Rules. You may use existing document templates and forms for this process. There are three different types of PDF documents – text-based, form-based, and image-based.

Text-Based PDF

Documents converted directly from word processing are *text-based* documents. Creating a PDF file in this manner requires that your word processor enables you to save to PDF format, or else requires a PDF conversion program. Adobe Acrobat is one example of PDF conversion program; however, it is not your only option. There are many programs that enable you to create a PDF document from your word processor.

COA Request: When preparing your PDF documents, convert all original word-processed documents directly to PDF. The Court's strong preference is that documents filed through the e-filing system are text-based PDF files, so that text is searchable and selectable.



COA Caution: At this time, the Court is able to receive documents created with many versions of Adobe Acrobat. However, the PDF document that you submit must be compatible, at a minimum, with Acrobat 7.0 or later. If you limit compatibility to Acrobat 9.0 or later, we may not be able to open the file and you will likely receive a format error and need to re-submit the document. For further details, see [notes on document compatibility](#) later in this document.

Form-Based PDF

You may submit interactive fillable PDF forms. This type of form contains fields that you can select or fill in and save. A set of **E-Filing Forms** is available on the Court of Appeals E-Filing Forms website page [<http://courts.mi.gov/Courts/COA/forms/Pages/EFiling.aspx>].

The forms can include a typed signature and can be saved in PDF. Therefore, the form does not need to be printed, signed, and scanned before it is filed.

In order to save a filled-in E-Filing form, you must have either Adobe Acrobat (rather than the free Adobe Reader which is useful for viewing forms) or other PDF conversion software.

You are not required to use the E-Filing forms to work with the e-filing system; the forms are optional and available for the convenience of those who have the software mentioned above. The alternative is to use your existing forms and then save or convert these documents to PDF format.

Approved: Michigan Court of Appeals
LOWER COURT: _____
E-Filed: _____
CASE NO.: _____
BRIEF COVER PAGE
Lower Court: _____
Court of Appeals: _____
Case Name: (Short title of case) _____
1. Brief Type (select one):
☐ APPELLANT(S) ☐ APPELLEE(S) ☐ REPLY
☐ CROSS-APPELLANT(S) ☐ CROSS-APPELLEE(S) ☐ AMICUS
☐ OTHER (specify): _____
2. This brief is filed by or on behalf of (insert party name(s)): _____
3. ☐ This brief is in response to a brief filed on _____ by _____
4. ORAL ARGUMENT: ☐ REQUESTED ☐ NOT REQUESTED
5. ☐ THE APPEAL INVOLVED A RULING THAT A PROVISION OF THE CONSTITUTION, A STATUTE, RULE OR REGULATION, OR OTHER STATE GOVERNMENTAL ACTION IS INVALID.
(See MCR 7.212(C)(1) to determine the rules.)
6. As required by MCR 7.212(C), this brief contains, in the following order: (check applicable boxes to verify)
☐ Table of Contents (MCR 7.212(C)(2))
☐ Index of Authorities (MCR 7.212(C)(3))
☐ Jurisdictional Statement (MCR 7.212(C)(4))
☐ Statement of Questions (MCR 7.212(C)(5))
☐ Statement of Facts (with citation to the record) (MCR 7.212(C)(6))
☐ Arguments (with applicable standards of review) (MCR 7.212(C)(7))
☐ Matter Requested (MCR 7.212(C)(8))
☐ Signature (MCR 7.212(C)(9))
7. This brief is signed by (type name): (s/ _____)
Signing Attorney's Bar No. (if any): _____
(9/10) E-File Brief Cover Page MCR 7.212(C)

Image-Based PDF

You can also create PDF documents by imaging (or scanning) paper documents. These are sometimes called *image-based* PDF documents. It is acceptable for non-original documents to be scanned into PDF.

There are several factors to consider when determining how the scanning will be done. The level of detail recorded by the scanner determines the quality of the document. This detail is referred to as the resolution, which is measured by the dots per inch (dpi). A higher resolution is slower to scan and creates a document with a larger file sizes. This, in turn, will cause retrieval of the document to be slower. Documents scanned for e-filing with the Court of Appeals should be scanned at a resolution of either 200 or 300 dpi. A resolution higher than that makes the file unnecessarily large.

Another factor to consider is the mode of scanning. Most of the time, scanning should be done in black and white (rather than color or grayscale), so that the file size will be as small as possible. Never scan in color unless absolutely necessary. This may produce an extremely large file size, which will take longer to retrieve for viewing purposes.

Depending on your scanning equipment, OCR (optical character recognition) may be a part of the conversion process, so that the text can be manipulated like a text-based PDF.

COA Request: Scanning is acceptable for pre-existing exhibits. If it is necessary to scan documents to PDF, please consider the settings that will produce an optimum PDF file. Strive to find the balance of the best quality results with the smallest file size.

Before you submit a scanned PDF, consider optimizing the scanned PDF, if that feature is available to you. [Step by step optimizing instructions are available](#) later in this document.

Create a PDF Document

Before filing through the e-filing system, convert all documents to PDF format.

COA Request: When creating a PDF document, use descriptive filenames and avoid special symbols. The names should be reasonably concise and provide some idea about the file contents. It is acceptable to include upper- and lower-case letters, spaces and hyphens in your filename; avoid using special characters (such as # / \$ & %) as they may cause problems. Filenames that begin with “Attach” at the beginning of the filename can also cause problems.

COA Request: When preparing your PDF documents, whenever possible, convert all original word-processed documents directly to PDF. Use settings that add bookmarks and generate the bookmarks based on Word’s headings or your customized styles.

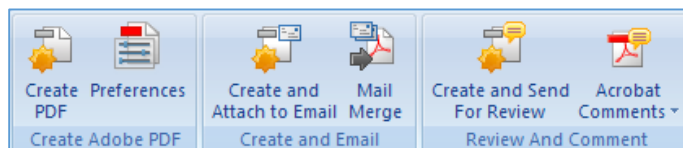
Save a Document as PDF from a Word Processor

Newer versions of popular word-processing programs, such as Word and WordPerfect, enable you to easily save documents to PDF file format and thereby create a PDF document.

1. **Open** your word-processed document.
2. Depending on the word-processing program and version, there are many built-in options for saving a PDF. You may select **File, Save As** and select File Type of PDF. (Or, you may select **File, Publish As, PDF** or select **File, Export, Create PDF**.)
3. **Save** the file. By default, the PDF is saved to the same folder as the original document file.

Convert a Document to PDF using Adobe Acrobat

With Adobe Acrobat or other PDF conversion software installed, you will likely have access to a set of buttons to enable you to convert a file to a PDF document and specify related preferences.



To convert a Microsoft Word document to a PDF file using the Acrobat PDFMaker Add-In:

1. **Open** your word-processed document.
(You will need to save the document in Word before creating a PDF.)
2. From the **Adobe PDF** menu or ribbon tab, choose **Create PDF**.
3. In the Save Adobe PDF File As dialog box, enter a filename and location for the PDF, and click **Save**. A PDF file is created and saved in the appropriate location. The filename contains the .pdf extension.

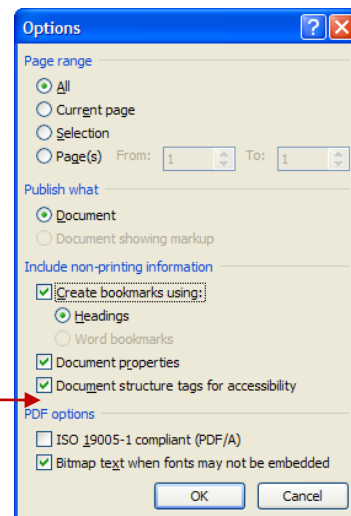
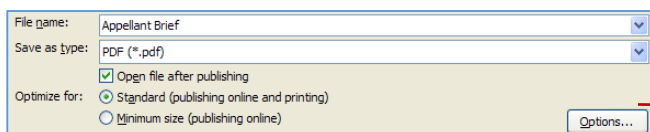


Specify Preferences for PDF File Creation

You may need to adjust the settings that apply when you generate PDF documents. There are options built into the word-processing program and Adobe Acrobat. For example, to incorporate bookmarks in your filings, we suggest that your document templates use heading styles to denote the primary sections of the filing. When you convert your document to PDF, you can specify that a bookmark appears for each heading style used in the document. A reader will be able to open the Bookmarks panel to use bookmarks to navigate to a specific section of the document.

Set Options for Saving to PDF

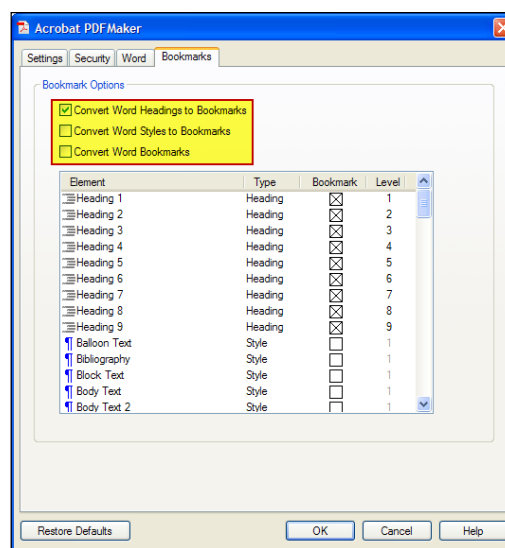
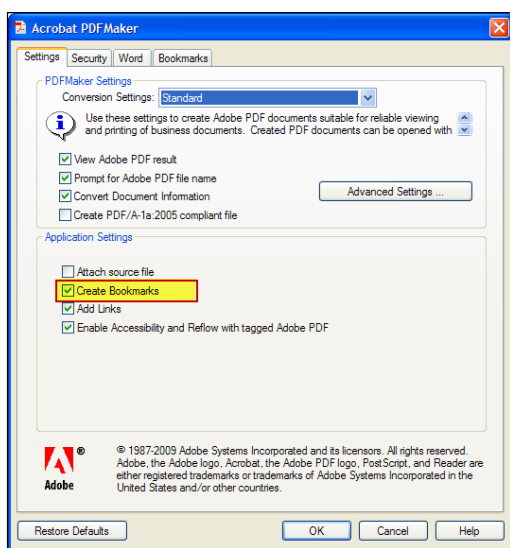
In Word, when you choose to save to the PDF file type, several options are available. The **Optimize for** setting controls the file size and quality of the PDF that is produced. When you click the **Options** button, additional options are available, including whether or not to create bookmarks based on your document headings.



Set Preferences for Creating a PDF

When using Acrobat for PDF conversion, settings determine the characteristics of the PDF files you generate. All settings specify a unique balance between the quality of a document and its file size.

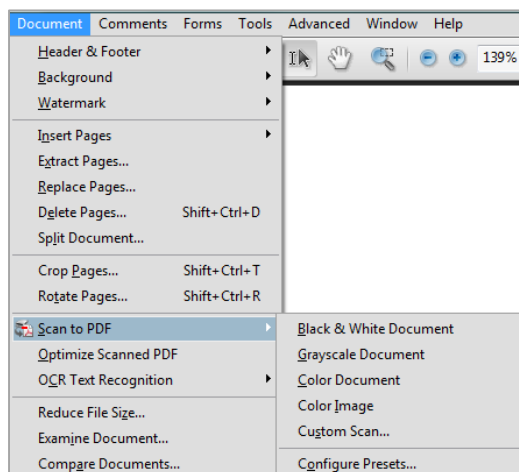
On the Adobe PDF ribbon tab, click **Preferences**. In the Acrobat PDF Maker dialog box, on the **Settings** tab, be sure that **Create Bookmarks** is checked. Also, on the **Bookmarks** tab, specify whether you want to use Word Heading styles or other Word styles to generate bookmarks. Click **OK** to close this dialog box.



Create a PDF Document by Scanning

There are several ways to create a PDF document from paper. Ideally, the resulting PDF will also be a document that is searchable and selectable.

- At the scanner, you can scan your document into an image file. The results depend on your scanner, but you can commonly specify PDF as the file type and turn on an OCR (or Text Recognition) setting.
- Or, you can scan directly into a program such as Acrobat by using the **Create PDF from Scanner** menu choice. If you use the **Create PDF from Scanner** option from within Acrobat, you can convert a paper document into a PDF that is searchable and selectable by choosing any of the three document presets (Black & White Document, Grayscale Document, Color Document). These presets have the OCR option enabled by default so you create a fully searchable and selectable scanned PDF.



Each scanner is different and uses different software, different defaults, and different preset configurations. Consequently, the results will vary, but you can usually make a document searchable during the scan process or you can manipulate already scanned PDF files.

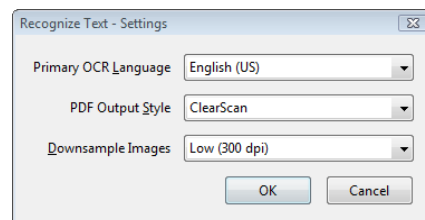
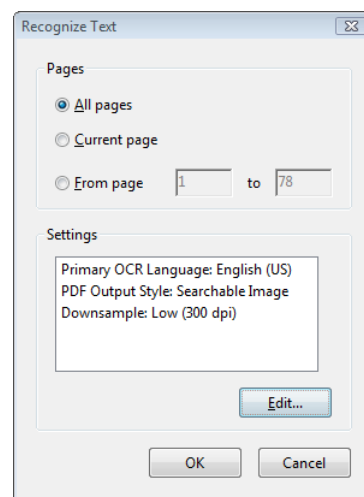
Recognize Text in a Scanned Document

If you already have a scanned PDF and you want to make it searchable and selectable, you can do so.

1. **Open** the scanned document in Acrobat.
2. Choose **Document, OCR Text Recognition, Recognize Text using OCR...**
3. Select the pages you want to OCR.
4. Click **OK** to initiate the OCR process.

Note about PDF Output Style

Consider changing the PDF Output Style to ClearScan. ClearScan OCR is not the default in Acrobat 9, so you will need to change a setting to use it. In the Recognize Text dialog box, click the **Edit** button to select the **ClearScan** PDF Output Style and click **OK**. The setting sticks for future sessions.



Prepare Documents for File & Serve

Court Guidelines for Submitting PDF Documents

Although there is no file size restriction on submitting documents through the e-filing system, there are practical limits to the size of an electronic document that judges and staff can quickly and easily retrieve and read within our case management system.

While it is possible to combine a number of separate PDF documents – such as appendices and exhibits – into a single PDF document, the Court has established guidelines with regard to what items should be bundled together. Any departure from these guidelines may cause your filing to be rejected by the Court.

COA Request: A distinct document – one that will be docketed separately – should be in its own separate PDF file. A **brief** or a **motion** is an example of a document that should be in one PDF file. Other documents that should be filed as separate attachments include **appendices**, **transcripts** and **PSIRs**.

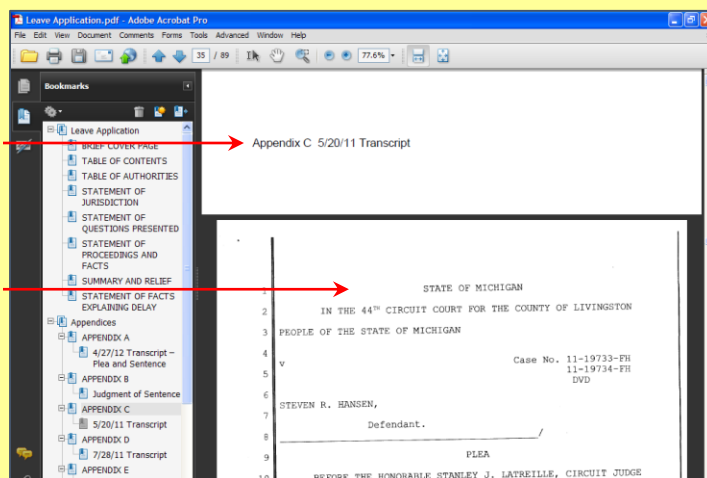
In general, individual attachments should be manageable, in terms of the time it takes to download or open the file. For example, if you are filing an application for leave to appeal and you need to submit the trial transcripts, each day of trial should be a separate attachment to the application, rather than combining several transcript volumes in a single attachment.

All **PSIRs** must be filed as separate attachments so that they can be handled in a confidential manner when received by the Court. It should NEVER be included with other items as part of a larger appendix.

When combining multiple items into an appendix, be sure to include a **cover page** to identify the position of each individual appendix. Ideally, the cover page should have Appendix XX toward the bottom of the page so when a bookmark is clicked to that page, it will actually display the beginning of the appendix on the next page.

*Bookmark text
should be placed in
the lower-left corner
of the cover sheet....*

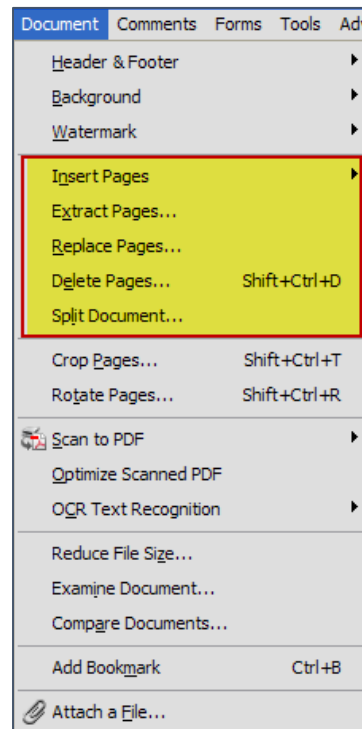
*so that text displays
here.*



Manipulate Individual PDF Files

PDF Conversion software, such as Adobe Acrobat, enables you to insert, delete, and extract pages to better assemble your PDF files. In general, you can use the **Document** menu options in Adobe Acrobat to manipulate pages in a PDF document that you are preparing to file.

- You can add all the pages from one PDF document to another PDF document using the **Insert Pages** command.
- You can also use the **Extract Pages** command to extract the pages you want from one PDF document and generate a new PDF file with only those pages.
- In a similar manner, you can use the **Replace Pages** command to replace an entire page, without affecting links and bookmarks.
- You can use the **Delete Pages** command to delete the pages you do not need.
- If you end up with a huge PDF and you would like to split the document into separate smaller documents, use the **Split Document** command. You can specify the criteria for dividing the document: by maximum number of pages, maximum file size, or by top-level bookmarks.

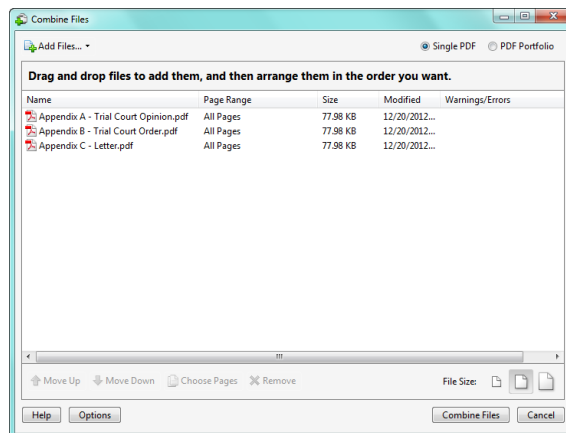


COA Caution: To combine a number of separate PDF docs, do not use embedded file attachments. Instead, use the **Document, Insert Pages** menu option. The e-filing system cannot accept PDF documents with file attachments added by using the Attach a File tool to combine separate PDF files.

Merge Files into a Single PDF

Software such as Adobe Acrobat enables you to merge files into a single PDF.

1. Within Acrobat, select **File, Create PDF, Merge Files into a Single PDF** (depends on version).
2. Click **Add Files** and select the files you want to add.
3. Click, drag, and drop to reorder the files and pages. Double-click on a file to expand and rearrange individual pages. Press the Delete key to remove unwanted content.
4. When finished arranging the files, click **Combine Files**.
5. Select **File, Save As, PDF**.
6. Name your PDF file and click **Save**.



Use Bookmarks to Create a PDF Document that is Easy to Navigate

When preparing your PDF documents, use bookmarks to denote the primary sections of the filing. If you converted your document from a word processing document and you converted headings or another style to bookmarks, you will be able to open the Bookmarks panel and view bookmarks. A bookmark appears for each heading or style used in the document. By displaying all of the headings and subheadings, the reader is able to get an overview of the document and to easily navigate to a specific section.

A scanned PDF document will not have any automatic bookmarks. See the [Create a Bookmark](#) section for more information.

It is best to work with bookmarks when you are finalizing your PDF. If you need to re-convert the original document from Word or re-scan a document, you may need to re-create and adjust your bookmarks.

COA Request: When preparing your PDF documents, use bookmarks to denote the primary sections of the pleading.

Bookmark text should accurately reflect the contents of the bookmark. Viewers will rely on the bookmark title to get an idea of what they can expect to find when they click the bookmark. (For instance, ***APPENDIX J Order and Memorandum Denying Motion for Relief from Judgment*** is preferable to ***APPENDIX J.***)

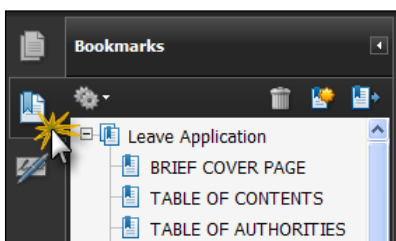
If you choose not to use bookmarks in your PDF document, the Court requires that you include a table of contents at the beginning of the document.

View Bookmarks

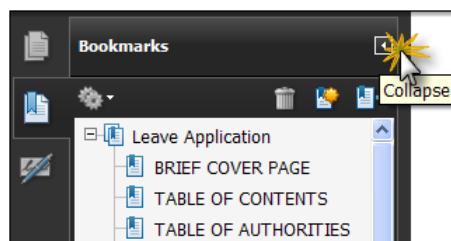
Open or Close Bookmarks

You can easily open or close the Bookmarks panel.

One way to open or close the Bookmarks panel is by clicking the [Bookmarks](#) button on the left side of the document window.



You can also close the panel by clicking the [Collapse](#) box in the navigation panel.



Expand or Collapse Bookmarks

Some bookmarks contain subtopics. If a bookmark contains subtopics, click the [plus sign](#) or the [minus sign](#) next to it to expand or collapse the list of subtopics.

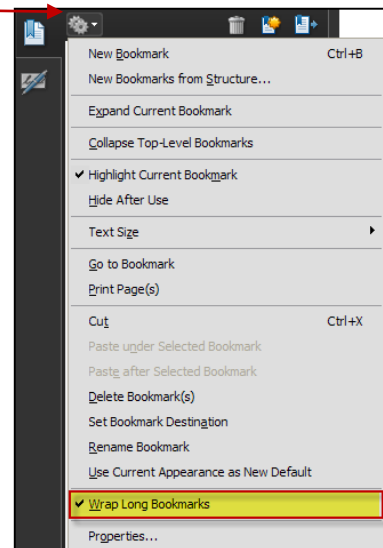
Wrap Long Bookmarks

If the bookmark text is truncated, you can click the **Options** button and select the **Wrap Long Bookmarks** option. All of the text will display, regardless of the width of the navigation pane.

Be Specific with Bookmark Destinations

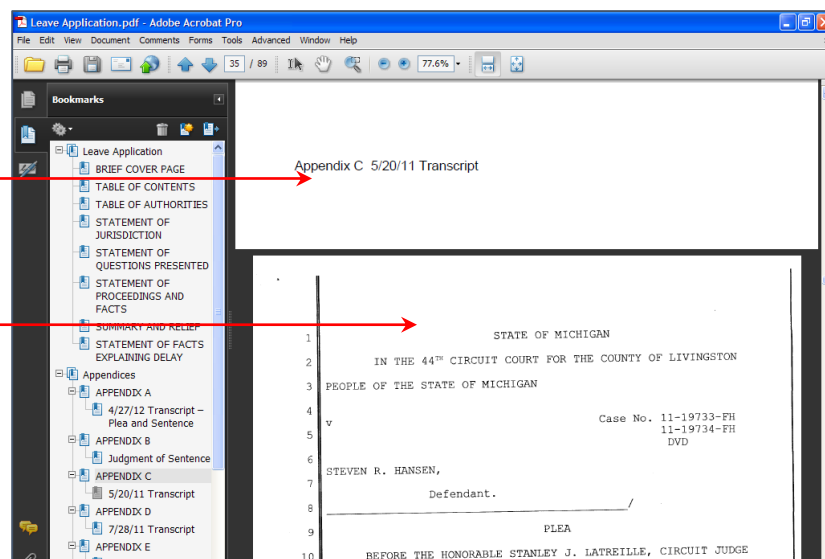
When combining multiple items into an appendix, be sure to include a cover page to identify the position of each individual appendix.

Ideally, the cover page should have Appendix XX toward the bottom of the page so when a bookmark is clicked to that page, it will actually display the beginning of the appendix on the next page.



Bookmark text should be placed in the lower-left corner of the cover sheet....

so that text displays here.

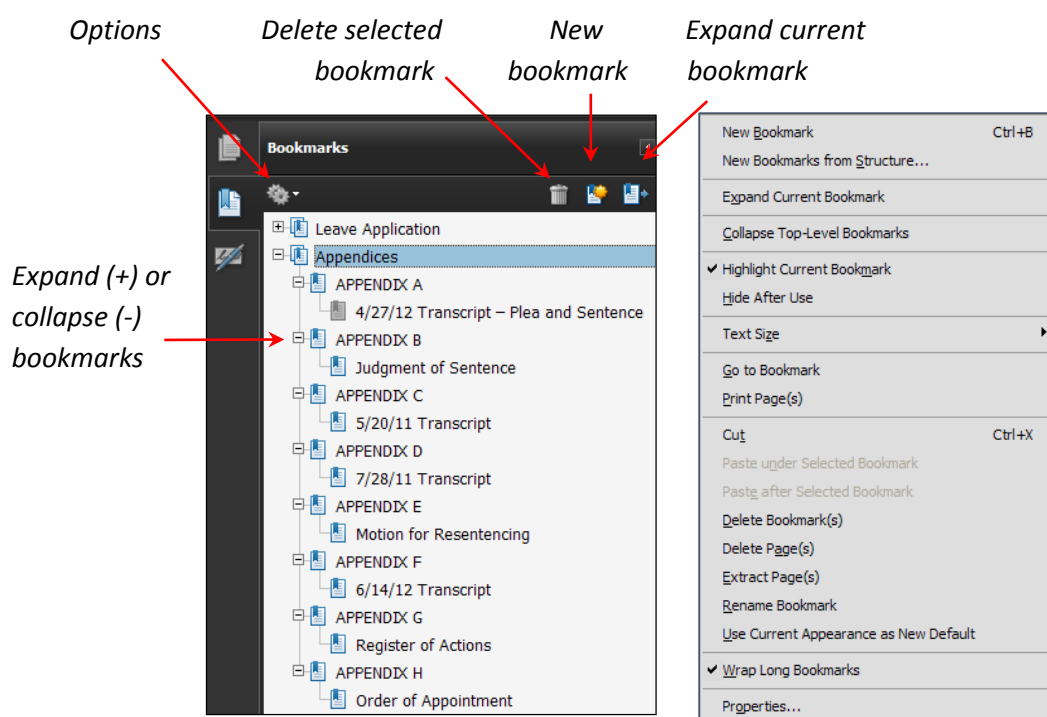


Modify a Bookmark

Creating bookmarks in a PDF file is easiest if you use Word's built-in heading styles or your own set of custom styles that you select in the conversion settings. However, after you have created a PDF document, you can also create new or additional bookmarks to draw the reader's attention to specific sections. When you create or edit bookmarks, use the Bookmarks toolbar to streamline your work.

Use Options to Manipulate Bookmarks

The Bookmark Options menu enables you to edit a bookmark by changing the bookmark destination, renaming a bookmark, or deleting a bookmark. Select the bookmark and then choose the appropriate option. In the Bookmark panel, you can also click and drag a bookmark to arrange it differently.



Create a Bookmark Manually

1. **Select text** in the PDF document.
2. In the Bookmarks panel, choose **Options**, **New Bookmark** or click the **New Bookmark** icon at the top of the Bookmarks panel. (Or, press [Ctrl] + B, which is the shortcut key for creating a bookmark.)
3. The new bookmark appears below the bookmark you selected when you clicked the icon. The bookmark name is highlighted. If necessary, **edit the name** of the new bookmark, and press **Enter**.

Tip: At your discretion, you can select a bookmark and then choose **Options**, **Properties** (or right-click the bookmark and choose Properties) to specify a text style and color for the bookmark.

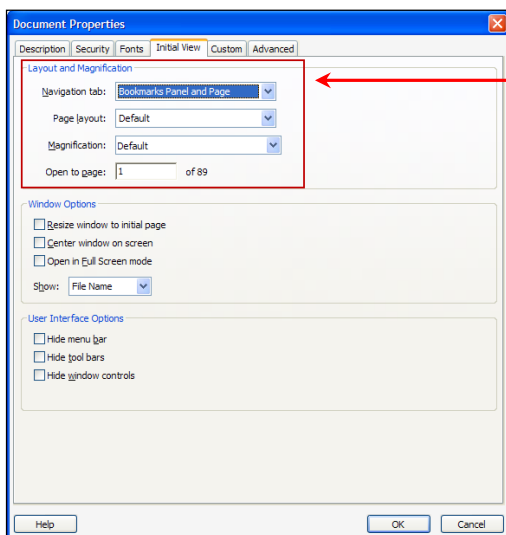
Define an Initial View that Includes Bookmarks

When a reader opens your PDF document, they see the initial view of the PDF. You can set the initial view to display the pages in the way that you want. Please take the time to specify an initial view that shows the Bookmarks Panel.

COA Request: When preparing your PDF documents, specify an initial view that displays the Bookmarks Panel. (While it is very easy to toggle the bookmarks on or off to suit individual preference, the initial display will alert our internal users that the bookmarks exist and serve as a point of reference while working with the PDF file.)

1. **Open** the PDF document in Acrobat.
2. Choose **File, Document Properties** (Ctrl + D).
3. In the Document Properties dialog box, select the **Initial View** tab.
4. In the Navigation tab field, select **Bookmarks Panel and Page**.
5. Click **OK**.
6. **Save** and reopen the file to confirm the initial view display.

Tip: This option should always be set for each file you submit so that users are immediately aware of the document navigation available through the Bookmarks panel.



Under the Initial View tab, you can set which panels are displayed in the navigation panel.

The other Layout and Magnification options do not need to be changed unless there is a special need for the PDF document.

Final Document Preparation

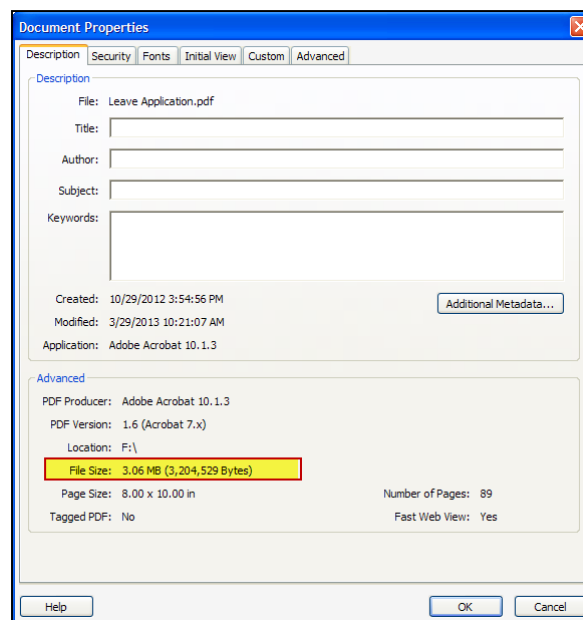
Determine the Size of a PDF Document

From within Acrobat, you can check the size of a file by choosing **File, Document Properties**. On the **Description** tab, the file size is listed toward the bottom.

Large files take a long time to download. Optimizing PDF files can significantly shrink their size and boost display speed.

Currently, 80% of the files we receive via e-filing at the Court are less than 1 MB (1,000 KB). An additional 17% are between 1 MB and 5 MB (1,000 KB and 5,000 KB). The Court prefers to receive files in this size range for manageability.

There are several ways to reduce the file size and results will vary with each file. You can try each of these techniques with a PDF document and compare the results to see which method produces the smallest file.



COA Request: When preparing your PDF documents, perform the necessary steps to reduce the file size and optimize the PDF for the best performance possible. These optimization methods are easy to use and essential to consider when you are preparing your PDF files prior to electronically filing with the Court.

Note: In the Document Properties dialog box, the **Description** tab also lists information about your document. By default, some of the options, such as Title and Author, may be automatically populated by your word-processing application. Text included in these fields is visible to anyone who opens the document. As a safeguard, you may want to consider the information that is included in the Document Properties **Description** fields, in light of your business processes, and make necessary adjustments.

Optimize PDF Files and Reduce File Size

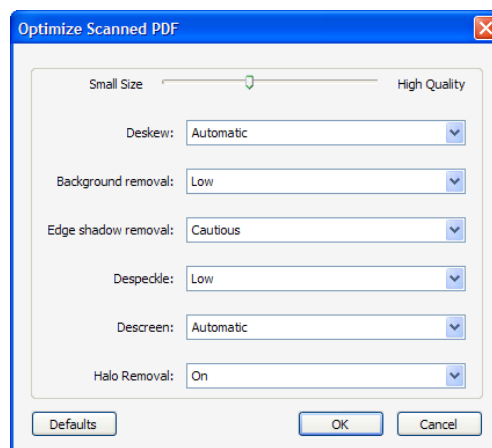
Use the File, Save As command

You can sometimes reduce the file size of a PDF simply by using the Save As command (rather than repeatedly using the Save command). Once you are done making changes to your PDF document, choose **File, Save As**. When prompted, save the document with the same name to overwrite the original with your changes. When you use the Save As command, Acrobat rewrites the entire PDF document as efficiently as possible.

Use the Document, Optimize Scanned PDF command

1. With the PDF document open, choose **Document, Optimize Scanned PDF**.
2. Click **OK**.
3. **Save** the optimized version of the document.
(You can overwrite the original file or you can save the optimized version separate from the original file. This might be a good idea until you verify the results since you cannot undo or de-optimize the file.)

After optimizing, it is a good idea to double-check the overall quality and readability of the document. Note that this option is only available in Acrobat 9 and later.

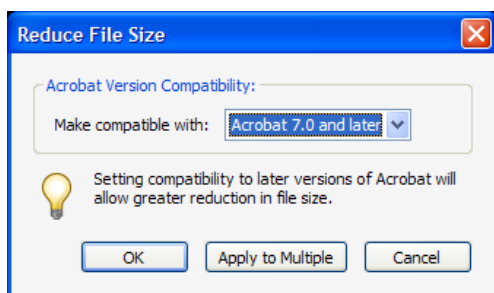


Use the Document, Reduce File Size command

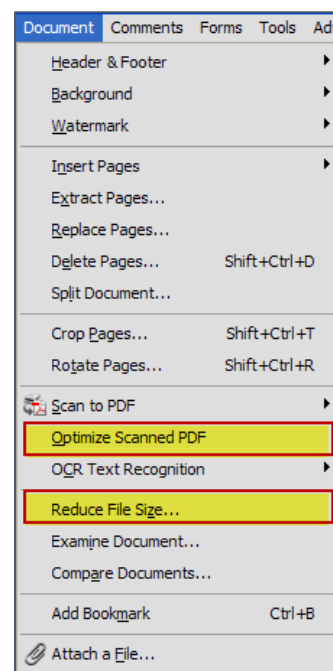
Another option is to use the Reduce File Size command on the Document menu, and set the compatibility to an appropriate version of Acrobat. The Reduce File Size command recompresses images, compresses document structure, and cleans up elements such as invalid bookmarks.

To reduce the file size in this way:

1. With the PDF document open, choose **File, Reduce File Size**.
2. Set the PDF Compatibility to **Acrobat 7.0 and later**.



3. Click **OK**.
4. When prompted, specify a name and location to save the file.

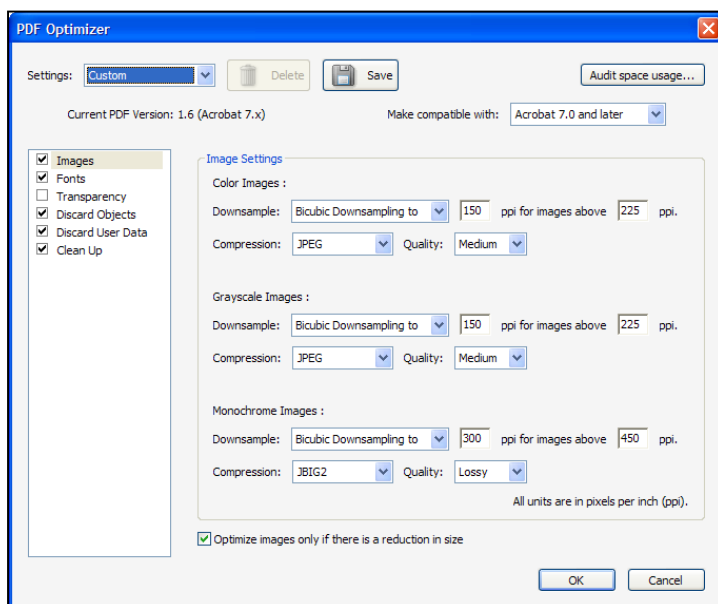


Use PDF Optimizer

In addition to PDF version, other factors in creating a small PDF file include image type and resolution, fonts and how they are embedded, and the level of compression. Using the PDF Optimizer you can select and carry out multiple operations or manipulate a single setting.

To reduce file size using the PDF Optimizer:

1. Choose **Advanced, PDF Optimizer...**
2. Set the PDF Compatibility to **Acrobat 7.0 and later**. If you are uncertain what the remaining options are for, just accept the default settings.
3. Click **OK**.



Important Note about Document Compatibility

The Tyler File & Serve system may not accept PDF documents created with Adobe Acrobat 9.x or later. PDF documents created using Acrobat 9.x (or later) sometimes fail to process through the File & Serve system. However, sometimes the documents do successfully process. To reduce the risk of failure, we recommend that you save your documents to an earlier version of Acrobat. Overall, the e-filing system supports documents that are compatible with Acrobat 7.0 and later. At this time, the recommendation is to set the PDF compatibility to Acrobat 7.0 and later to ensure successful e-filing.

In order to change the PDF version to make your PDF document compatible with an earlier version of Acrobat, review the instructions above for using the Reduce File Size command or the PDF Optimizer feature. When you save the file in this manner, your PDF document should be ready to submit through the system.



Frequently Asked Questions (FAQs)

BASICS

How do I access TrueFiling?

Go to the following website: <https://www.truefiling.com> and follow the prompts on the screen to either signup or logon to TrueFiling.

Is TrueFiling a mandatory or voluntary system?

TrueFiling is a voluntary system at this time. The Courts expect that it will be mandatory in the future, at least as to some filers and case types.

Can the TrueFiling system be used to initiate cases and to file into existing cases?

Yes, TrueFiling can be used to initiate cases or file into existing cases.

May I use TrueFiling to e-file in cases that were initiated through the prior e-filing system at the Court of Appeals or by paper filing?

Yes, you may submit filings through TrueFiling for all open cases in the Court of Appeals regardless of how they were initiated.

Can TrueFiling be used to file emergencies?

Yes, TrueFiling can be used to file emergencies. Filers are encouraged to call the Clerk's Office during business hours **before** submitting an emergency e-filing. Clerk's Office staff will not be available after 5:00 p.m. or on weekends to process emergencies. **A printed copy of the filing(s) must be served by traditional means (personal or mail) unless opposing counsel has registered with TrueFiling.**

By what time does a document need to be e-filed to be considered filed that day?

A filing received by 11:59 pm on a business day is considered filed that business day under MCR 7.202(2). A filing received on a weekend or holiday is considered received on the next business day.

Is technical support available?

For any technical support issues, you should contact TrueFiling Support at 855-959-8868 or by emailing support@truefiling.com. Technical Support is available Monday through Friday, from 8:00 am to 9:00 pm ET except on US holidays.

E-FILING DOCUMENTS AND E-SERVICE

Does TrueFiling accept only PDF documents?

In addition to accepting PDF documents, TrueFiling also accepts primary and connected documents (attachments) in these file formats:

- Microsoft Word (DOC and DOCX)
- Adobe PDF (PDF)
- Plain Text (TXT)
- Scanned Images (TIFF, JPG, and PNG)

However, the Courts prefer that documents be submitted in searchable PDF.

What is the maximum file size that can be electronically submitted?

10 MB is the maximum file size for each document (primary or connected) within a bundle. There is no maximum size limitation for a bundle.

Are hyperlinks permissible in PDF documents?

Internal links, which point to other places within the same document, are permissible. External links, which point to other documents, websites or legal sources, are discouraged as they may break over time.

Can I file multiple pleadings – such as a brief and motion – in one transaction?

Yes, provided the filings are all for the same case. TrueFiling looks at a transaction as a “bundle.” A “bundle” can hold multiple primary documents and each primary document can have multiple attachments referred to as connected documents.

What distinguishes a primary document from a connected document?

There are different “Filing Types” for primary and connected documents. The “Filing Types” for primary documents include applications, claims of appeal, briefs, motions, answers, stipulations, etc. The “Filing Types” for connected documents are more limited and include attachments and exhibits. Any filing that requires payment of a statutory fee must be filed as a primary document. A presentence investigation report may be submitted as either a primary or a connected document; however, it should always be submitted as a separate document because it contains confidential information.

If I have several documents to submit, should I create a single file that combines these documents, or would the Court prefer that I put each document in a separate file?

Each primary document such as a brief, motion, or answer, should be a separate file. To facilitate internal handling of appendices and exhibits, the Court prefers that they be combined into a single, separate file (provided the file size doesn't exceed 10 MB) and submitted as a connected document to the primary document. However, a confidential document such as a presentence investigation report should be submitted as a separate primary or connected document, i.e., not combined with other appendices or exhibits.

When I file a pleading, I typically include a cover letter and proof of service. Should I continue to do that in this system?

No, those documents are not necessary. TrueFiling creates a cover sheet for the Court that identifies the case name, docket number, filer information and the titles of the filings included in the bundle. An electronic proof of service is automatically generated by the system and is served on all e-service recipients. There is no need to include additional paperwork. You may print the electronic proof of service for delivery to any recipients that you do not electronically serve via TrueFiling so that the parties and the Court are in possession of the same documentation. As to a cover letter, if you believe that such a letter has a purpose in a specific case, please submit it as a separate filing within the bundle so that the Court's electronic copy of the primary document does not have a cover letter as page one.

Is it necessary to add a service recipient who is being served by mail, to the TrueFiling bundle, if that information is contained in a separate proof of service?

No. If a separate proof of service is drafted and e-filed along with the primary document, the filer does not need to add the person being served by first class mail as an additional service recipient in TrueFiling.

How do I e-file a proof of service that I drafted and mailed to opposing counsel with my primary filing?

The proof of service may be submitted in TrueFiling as the last page of the primary document, as a connected document, or as a separate primary document.

What if I need to withdraw an e-filing in TrueFiling?

If a bundle is in progress and has not yet been submitted in TrueFiling, it can be deleted by clicking on Delete Bundle on the Bundle Details page. Once a filing has been submitted, it cannot be withdrawn through TrueFiling.

Will I have access to the documents that I file in the system?

Yes, you may access your previously filed documents in an individual case from the Case Details page. Alternatively, your filings for all cases may be accessed by clicking on "History" in the main menu.

Note: You cannot view e-filings submitted by other parties on the case. However, parties who are electronically served through TrueFiling will receive an email notice that includes a link to the electronic document. You may wish to open and save the served document so that you continue to have access to it.

Can I access a time-stamped copy of an e-filing through TrueFiling?

Yes. The time-stamped copy is available only to the filer after the document is accepted by the Clerk. The time-stamped copy may be accessed through either the Case Details page or the filing History link. Click on the Filing Name and then click on the paperclip icon at the beginning of the line where the Status is Filed.

When is a filing considered “Filed” with the Court?

A filing is considered “Filed” once it has been accepted by the Court. Following acceptance, you will receive an email notification if you enable that notification type in TrueFiling.

How do I know if an attorney is registered with TrueFiling?

From the Case Details page, click on the Add Opposing Counsel link. In the *Search Attorney Name, Attorney Number, Email Address, or Firm Name* field, enter opposing counsel's 5-digit numeric bar number, and click the Search button. If opposing counsel is registered, their name and email address for e-service will be displayed in the Search Results. Opposing counsel can be linked to the case by clicking on the Add Selected button at the bottom of the page.

If opposing counsel's name does not appear in the Search Results, they are not registered with TrueFiling and have not agreed to e-service through TrueFiling. Attorneys who are not registered with TrueFiling should be served through traditional means (by mail or in person).

Filers should not rely on the list of approved e-service addresses previously published on the Court of Appeals website. This list applied to filers registered with the Tyler Odyssey File & Serve system and does not apply to the TrueFiling system.

If an attorney is not registered with TrueFiling, but has previously consented to e-service, is it acceptable to add them as an additional service recipient on a bundle, include a statement that they have agreed to e-service, and e-serve them through TrueFiling?

A statement that opposing counsel has previously agreed to e-service is insufficient. Agreement to e-service is part of the registration process with TrueFiling. A filer should not attempt to e-serve an unregistered attorney. Instead, they should either (1) serve opposing counsel through traditional means (i.e., by mail or in person), or (2) encourage opposing counsel to register with TrueFiling and then wait to e-serve counsel until he or she has completed the registration process.

Is it possible for multiple people from the same firm (attorneys and staff) to receive e-service and notification on filings in an individual case?

Yes, it is possible to add multiple attorneys and staff members from the same firm to a case. To do so, go to the Case Detail screen, scroll down to Firm Contacts and click on Add Attorney and/or Add Contact to add additional staff from your firm to the case.

How do I serve a copy of an appellate filing on a trial court that requires e-service?

The filer should submit a copy of the appellate filing to the trial court through the trial court's e-filing system and draft a separate proof of service for filing with the appellate court that reflects the manner of service on the trial court.

FEES

How do I request a fee waiver or submit a filing with an associated statutory fee when fees have been waived?

The Supreme Court and Court of Appeals handle fee waivers differently. Filers should review the options available for each Court by clicking on the Request Fee Waiver button on the Bundle Details page. Note, if you are filing a motion to waive fees in the Court of Appeals, it should be uploaded from the Request Fee Waiver screen.

If I am court-appointed counsel, do I need a credit card on file to submit filings?

No, you do not need to have a credit card on file when making filings as appointed counsel. But you will need to select the appropriate fee waiver option when you submit the bundle for filing.

Are there transaction, service, or convenience fees for submitting a filing?

At this time, there are no service or processing fees of any type when using TrueFiling to submit e-filings to the Supreme Court or Court of Appeals.

How do I access my payment activity in TrueFiling?

From the main menu, click Payment Accounts, then click the View Payment Information link and follow the onscreen directions.

How do I view payment receipt for an individual filing?

The payment receipt for an individual filing may be accessed through either the Case Details page or the filing History link. Click on the Filing Name and then click on the paperclip icon at the beginning of the line where the Status is Paid.

ADMINISTRATOR

What is the role of the Firm Administrator?

Every firm needs to designate a person to administrate the TrueFiling system. Even if there is only one user, there must be a designated Firm Administrator. The Administrator will initially register the firm with the system and will have administrative rights to set up and maintain all user and credit card data.

Do the passwords expire? What if I forget my password?

Passwords do not expire so you will not be required to periodically change your password. You may, however, change your password at any time through the My Settings link in the main menu. If you cannot remember your password, you should click the reset password link on the TrueFiling logon page.

Michigan Supreme Court and Court of Appeals

TrueFiling – Registration

Overview of TrueFiling Registration



A. Every user of TrueFiling must be:

- a. associated with a Firm.
- b. registered with a unique email address; and

*Note to self-represented filers, when you register, you will create a “Firm” for purposes of TrueFiling that is simply your first and last name.

B. The ONLY way to register with an existing TrueFiling Firm is by responding to an invitation email generated by TrueFiling when the Firm adds you as a Log-in User.

***Note: Do not go to truefiling.com and sign up (instead of responding to an email invitation from your TrueFiling Firm) as you will inadvertently create a new Firm.**

1. Choose a Firm Administrator.

The Firm Administrator will:

- a. create the firm, including setting up Payment Accounts and selecting Favorite Courts;
- b. add Attorneys and Contacts to the Firm; and
- c. maintain settings for the Firm, including Attorneys and Contacts (e.g., when people join or leave the Firm), and Payment Accounts (e.g., updating credit card(s) before they expire).

2. Firm Administrator enters truefiling.com in a web browser; creates their own account and Firm.

3. Firm Administrator clicks on **Firm Settings** page to select and save Firm settings.

*Note to Firms that have previously used a generic email address for e-service:

TrueFiling does not allow the use of generic email addresses for e-service. In TrueFiling, when opposing counsel selects an attorney in your Firm for e-service, the filing will be e-served to that attorney’s unique email address. If you wish, on the Firm Settings page, in the Servicing Email field, you may enter an email address to receive a courtesy copy of servicing notifications. You may similarly enter an email address to receive a courtesy copy of all email notifications.

4. Firm Administrator clicks on **Payment Accounts** page to set up credit cards for the Firm.

5. Firm Administrator clicks on **Case Search** page, then on the “Court Lookup” button, to select Favorite Court(s) for the Firm, i.e., the court(s) available in TrueFiling into which the members of the Firm may e-file.
6. Firm Administrator clicks on **Contacts & Attorneys** page to add Attorneys and Contacts (non-attorney Firm staff) to the Firm.
 - a. Check the “Allow this person to login and submit filings” box for each Attorney and Contact added who may want to log in to TrueFiling to check the status of a filing or to submit filings. TrueFiling automatically sends an invitation email to each Attorney and Contact for whom this box is checked. They complete their registration as Log-in Users by responding to the email.
 - b. It is recommended to check the “Allow this person to be a firm administrator” box for at least one other Attorney or Contact in your firm to handle issues requiring a Firm Administrator when you are unavailable.
7. Firm Administrator clicks on **My Settings** page to select their Default Page and Email Notifications preferences; and instructs Attorneys and Contacts who are Log-In Users to do so for themselves.

For technical assistance using TrueFiling, call ImageSoft Technical Support at (855) 959-8868 or send an email to support@truefiling.com.



1. Log in to [TrueFiling.com](https://www.truefiling.com).
2. Click the **eFile** link in the left navigation frame.
3. Select "Search for an existing case."
4. Select the "Court" in which you want to submit a filing.
5. In "Case Search," enter the docket number (full or partial) or the last name of a party and click the "Search" button.
6. From the Search Results, click on the Case Number into which you want to submit a filing.

*Note: If you expect to e-file additional documents in the case, you may want to add it as a Favorite for future filings by clicking on the Add to Favorites link in the upper-right corner of the Case Details page. The case will appear on your Favorites page, which is accessed by clicking the link in the left navigation frame.

7. On the **Case Details** page, review the "Case Contacts" listed on the middle of the page.
 - a. If the filing attorney is not listed as a Case Contact, click the "Add Attorney" link and select from the list of registered attorneys in your firm to add the filing attorney to the case.
 - b. Confirm that everyone to be e-served is listed as a Case Contact.
 - i. If opposing counsel is not listed, click the "Add Opposing Counsel" link to search for attorneys who have registered with TrueFiling. From the Search Results, select the checkboxes of the attorneys who are to be added as Case Contacts in the case.
 - ii. If you do not find opposing counsel using the "Add Opposing Counsel" link, you must serve them by mail or in person. You will have an opportunity to record mail or personal service by using the "Add Service Recipient" link in step 8 below.
 - c. Click the "Create New Bundle" button.
8. On the Create New Bundle page, confirm that the Service Recipient information is correct. To include a record of mail or personal service on the TrueFiling-generated proof of service, click the Add Service Recipient link and enter the required information. Otherwise, you must upload a proof of service regarding service by mail or in person. See "Overview of Service on TrueFiling," below, for more information on service.

9. On the **Bundle Details** page:
 - a. label and attach your primary filing.
 - b. select the "Add Connected Documents" link at the bottom of the screen to add connected document(s) such as exhibits;
 - b. review/update the payment information, as necessary; and
 - c. click the "Submit" button to submit the bundle.
-

Overview of Service in TrueFiling

- A. Case contacts are the only means for e-service via TrueFiling. When a filer submits a bundle in a case, all existing Case Contacts for that case are listed as Service Recipients who may be e-served.

Case Contacts are attorneys, support staff, and self-represented filers who have been added to a case.

An attorney may be added to a case as a Case Contact:

- a. by the attorney;
 - b. by a contact or attorney from the attorney's firm; or
 - c. by a filer using the "Add Opposing Counsel" search of attorneys registered in TrueFiling.
- B. An attorney or self-represented filer who has not yet registered in TrueFiling (and therefore cannot be added as a Case Contact) cannot be e-served via TrueFiling. A filer must serve such attorneys or self-represented filers by mail or in person. The filer may record mail or personal service by using the "Add Service Recipient" link. This results in the TrueFiling-generated Proof of Service showing both those who were e-served via TrueFiling and those who were served by mail or in person. Alternatively, the filer may upload a proof of service regarding service by mail or in person.

For technical assistance using TrueFiling, call ImageSoft Technical Support at (855) 959-8868 or send an email to support@truefiling.com.

Michigan Supreme Court and Court of Appeals

TrueFiling –Initiating a Case



1. Log in to [TrueFiling.com](https://www.truefiling.com).
2. Click the **eFile** link in the left navigation frame.
3. Select "Initiate a new case."
4. On the resulting page, select the appropriate court, form of initiation and filing attorney and click the "Create" button.
5. A page will open corresponding to the specific type of case initiation selected.
 - a. Enter information in all the required fields, and browse for and attach the case initiating document.
 - b. Click the "Finish" button to upload the document.
6. On the **Bundle Details** page:
 - a. select the "Add Connected Documents" link at the bottom of the screen to add connected document(s) such as exhibits;
 - b. click on the Case Number ("TEMP-") to open the Case Details page.

Bundle Details

Case Initiation for TEMP-BYMR8W3M

Case Title	PEOPLE OF MI V CRAIG HAMILTON
Case Number	TEMP-BYMR8W3M
Court	MI Test Court of Appeals
Filing Attorney	Kathy Donovan (88888)
Client Matter Number	(none)

7. On the **Case Details** page, add Case Contacts:
 - a. add any additional attorneys or contacts from the filer's firm;
 - b. click the "Add Opposing Counsel" link to search for opposing counsel who have registered with TrueFiling. If opposing counsel's name does not appear in the search results, you must serve them by mail or in person. You will need to indicate mail or personal service by using the "Add Service Recipient" link in step 8 below.
 - c. click on "Case Initiation for TEMP-" to return to the Bundle Details page.

PEOPLE OF MI V CRAIG HAMILTON

TEMP-BYMR8W3M
MI Test Court of Appeals

Information: The following bundles have not been submitted to the court yet.

Case Initiation for TEMP-BYMR8W3M	Kathy Donovan (88888)	Not Submitted	
Application	Application	In Progress	\$375.00

8. Click the "Edit Service Recipients / Bundle Properties" link and confirm that all information is correct. To include a record of mail or personal service on the TrueFiling-generated proof of service, click the Add Service Recipient link and enter the required information. Otherwise, you must upload a proof of service regarding service by mail or in person. See "Overview of Service on TrueFiling," below, for more information on service.
 9. On the **Bundle Details** page:
 - a. review/update the payment information, as necessary;
 - b. click the "Submit" button to submit the bundle.
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Overview of Service in TrueFiling

- A. Case Contacts are the only means for e-service via TrueFiling. When a filer submits a bundle in a case, all existing Case Contacts for that case are listed as Service Recipients who may be e-served.

Case Contacts are attorneys, contacts, and self-represented filers who have been added to a case.

An attorney may be added to a case as a Case Contact:

- a. by the attorney;
 - b. by a contact or attorney from the attorney's firm; or
 - c. by a filer using the "Add Opposing Counsel" search of attorneys registered in TrueFiling.
- B. An attorney or self-represented filer who has not yet registered in TrueFiling (and therefore cannot be added as a Case Contact) cannot be e-served via TrueFiling. A filer must serve such attorneys or self-represented filers by mail or in person. The filer may record mail or personal service by using the "Add Service Recipient" link. This results in the TrueFiling-generated Proof of Service showing both those who were e-served via TrueFiling and those who were served by mail or in person. Alternatively, the filer may upload a proof of service regarding service by mail or in person.

For technical assistance using TrueFiling, call ImageSoft Technical Support at (855) 959-8868 or send an email to support@truefiling.com.