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## About the Portal

## What is the Washington State Appellate Courts' Portal?

The Washington State Appellate Courts' Portal, which may be called the eFiling Portal, or just simply the Portal, provides the ability to electronically file documents with the Supreme Court and with the three divisions of the Court of Appeals.

## Who can use the Washington State Appellate Courts' Portal?

The Portal can be accessed by court staff and anyone who registers to use the Portal. Typical users of the Portal include court staff, attorneys, pro se litigants, court reporters, transcriptions, employees of the WSBA, employees of the CJC, and Federal Court employees.

## Do I have to be registered to use the eFiling Portal?

- Court staff do not have to register. Court staff will use their JIS/RACFID to access the Portal.
- Non court staff must register to use the Portal.

## **Registration Options**

## I see there are 3 registration options. How do I know which one to select?

The registration option available when registering are:

#### 1) Setup an Office Account

Use this option if you work in a law firm, prosecutor's office, or some other large organization with several attorneys. Office Accounts should be created when office staff will be expected to file on behalf of one or more attorneys. With an office account, attorneys may or may not ever file any of their own documents, they may rely mostly or entirely on staff to file for them.

An initial Office Account should be set up by one person in the office who will be designated as the office administrator and who will be responsible for maintaining information on staff working in the office.

When an Office Account is created it will be assigned an Office ID.

## 2) Register with an Established Office

This option should be used only by those who work for an organization that has already set up an Office Account to be used with the Washington State Appellate Courts'.

In order to use this option, you must have been provided with an Office ID by the Portal's Office Administrator.

#### 3) Register as an individual

This option is meant for attorneys who will file documents themselves and who will not be relying on office staff to file for them. Generally speaking this applies to attorneys working in small firms.

Attorneys who want to do some or all of their own filings, and who work in an organization that has setup and Office Account, may want to Register with an Established Office rather than setting up an Individual Account. Registering with an Office provides the option for office staff to file some files for the attorney if needed, but also allows the attorney to file their own documents if desired. It is the more flexible option.

Besides attorneys, this option should also be used by the following:

- Court Reporters
- Transcriptionists
- CJC Employees
- Federal Court Employees
- Pro Se Litigants/Participants
- WSBA Employees

## Our organization is very large with several divisions. Can we set up an office account for each division?

**Yes**. Just be sure when setting up the office that the Office/Organization Name, the Office Email Address (if used), and the Office Phone Number) are all unique.

Attorneys that work in more than one division of an organization can be added to more than one Office Account if needed.

## I want to register with an Established Office, how do I get an Office ID?

You will need to determine who in your organization may have setup and Office Account. That person will be the office administrator and will have received an email with the Office ID.

## Setup an Office Account

## Are there instructions for setting up an Office Account?

Yes. There are <u>Detailed Instructions</u> and a <u>Quick Start Guide</u> on the Portal.

## I want to setup an Office Account. What do I need to know before I get started?

Before beginning the process of setting up an Office Account, be sure to be prepared with the following:

- 1) A designated person to be the Office Administrator. That person should be the person who will fill out the online form.
- 2) The person setting up the Office Account will also be setting up their own user account at the same time, so a unique User ID will need to be chosen.
- 3) A list of attorneys who will be associated with the office. There must be at least one attorney associated with an office, additional attorneys can be added at a later date if needed.
- 4) The WSBA bar number for each attorney to be associated with the office.
- 5) An alternate email address for any attorneys who would like to receive documents at an address other than the address on file with the WSBA.

## If an attorney is associated with an Office Account are they registered to use the Portal?

**No**. By associating an attorney with an Office, registered office staff may file on an attorneys behalf. If an attorney wants to file their own documents, they will need to set up their own account by choosing the Register with an Established Office option.

## If an attorney is associated with an Office Account do they still need to register and have their own ID?

**No**. If an attorney is associated with an Office, then any office staff will be able to file on their behalf. An attorney may register if they like, but it is not necessary.

## When setting up an Office Account do I have to enter all attorneys at that time?

**No**. Only one attorney needs to be added when an account is established. Other attorneys can be added to the office at a later date by using the Manage Account option in the Portal.

## Do I need to know an attorney's bar number in order to associate them with the Office Account?

**Yes**. The attorney's WSBA bar number must be entered in the application and the bar number must match one on file with the Judicial Information System (JIS). If the bar number is not in JIS, the attorney cannot be added.

## I entered the bar number for an attorney, but the information I have does not match the information reported back by the application. What do I do?

You will not be able to add the attorney until the information in the Judicial Information System (JIS) is correct. You will need to promptly contact the WSBA and provide them with the attorney's most current information. It will then take approximately 2 to 3 weeks for the changes to be sent from the WSBA to be loaded to the JIS. You will need to wait a few weeks after notifying the WSBA, then return to the Portal and use the Manage Account option to associate the attorney with the Office.

## Can I provide an alternate email address for attorneys?

**Yes**. If the attorney has an email address they want to use, in addition to the official address provided to the WSBA, the registration process offers an option to enter that alternative address. When documents are filed on behalf of that attorney, then attorneys with alternative email addresses will receive confirmation email at both the official address and the primary address.

## Does the Office email address receive any email from the Portal?

**No**. At this time the office email address is just informational only. No correspondence from the Portal will be sent to the office email address.

## I would like all correspondence from the Portal to go to one email address for the Office. Is that possible?

**Yes**. If the office email address is used as an alternate email address for all attorneys associated with the office, and if all office staff use the office email as their alternative email address, then the office email will receive a copy of all correspondence generated by the Portal and sent to office staff and attorneys.

## My organization is large. I setup one Office and now I have to setup a second. Do I need to create another User ID to be the administrator for the second office?

**No**. Once the office and attorney information has been entered for an office, you will be prompted to identify yourself as either a Registered user or not. If you have already created an account, you will choose "Yes" when asked "Are you Registered to use the Portal?", then you will enter your user information. Once your user information is validated, the office setup will be completed.

## I don't understand the question "Are you Registered to use the Portal?"

If a person has already registered to use the Portal, and has valid User ID, then that person would answer Yes to the question "Are you Registered to use the Portal?" and the office setup would be completed on verification of the entered information (this is the least likely scenario). However, if the person setting up the office has not previously registered to use the Portal (which is the most common scenario), then the person setting up the office will answer No to the question and will continue on with the process. The remaining steps in the process will be to register the person.

## I am trying to enter a User ID, but it is being rejected?

A User ID must be unique and must meet our standards. Please see our <u>User ID Standards</u> for more information.

## I am trying to enter a Password, but it is being rejected?

Passwords must meet a fairly strict set of guidelines. Please review our <u>Password Standards</u> for more information.

## Register with an Established Office

## Are there instructions for Registering with an Established Office?

Yes. There are Detailed Instructions and a Quick Start Guide on the Portal.

## I want to register with an established office. What do I need to know before I get started?

You will need to obtain an Office ID from the Office Administrator.

If you are an attorney, you will need to make sure that you are aware of the information the WSBA has on file for you. When setting up your account, your entered last name and email address must match what is found in the Judicial Information System (JIS) which obtains its information from the WSBA.

If your WSBA information is out of date, you should contact the WSBA before attempting to register for the Portal. Then after contacting the WSBA, plan to wait 2 to 3 weeks before registering. It may take that long before the WSBA sends the updated information to JIS.

## I want the Portal to use a different email address from the one I have on file with the WSBA. Is that possible?

**Yes.** You have the option to enter an alternative email address. That alternative address will receive a copy of all correspondence that is sent to your official address. Please note that your official email address will still also be used for all correspondence as that is a requirement of the application.

## I know my office added me when the office was setup. Do I still need to register?

**No**. You only need to register if you want to file documents yourself. If you never expect to file on your own documents, you do not need an account.

## I know my office added me when the office was setup. Can I still register and have my own account?

**Yes**. If you would like to file your own documents, you will need an account. By having your own account, you can file yourself when you want, or you can ask office staff to file on your behalf when that is your preference.

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## Register as an Individual

## Are there instructions for Registering as an Individual?

Yes. There are Detailed Instructions and a Quick Start Guide on the Portal.

## I want to register as an Individual. What do I need to know before I get started?

If you are an attorney, you will need to make sure that you are aware of the information the WSBA has on file for you. When setting up your account, your entered last name and email address must match what is found in the Judicial Information System (JIS) which obtains its information from the WSBA.

If your WSBA information is out of date, you should contact the WSBA before attempting to register for the Portal. Then after contacting the WSBA, plan to wait 2 to 3 weeks before registering. It may take that long before the WSBA sends the updated information to JIS.

## I want the Portal to use a different email address from the one I have on file with the WSBA. Is that possible?

**Yes.** You have the option to enter an alternative email address. That alternative address will receive a copy of all correspondence that is sent to your official address. Please note that your official email address will still also be used for all correspondence as that is a requirement of the application.

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