

## Transitioning to TrueFiling 3.0

ImageSoft will release a new generation electronic court filing application that uses an intuitive user interface to guide the filer through the eFiling and eService process. In addition to a new, more modern interface, TrueFiling 3.0 is a cloud-based application that greatly enhances processing speed when filers create filings and submit them to the Court.

This document provides helpful information about existing and enhanced functionality you'll need to know as you transition to TrueFiling 3.0.

Within TrueFiling 3.0, a new, online Help system is available to guide you through the electronic filing and servicing process. As always, our TrueFiling Support team will be available to answer any questions you may have.

One important requirement in TrueFiling 3.0 is that a filing entity must now be a TrueFiling login user. If you intend to file on behalf of an attorney, that attorney **MUST** be a registered TrueFiling user.

As a result, prior to September, ensure any attorney on whose behalf you plan to file is a TrueFiling login user. If they're a login user in a TrueFiling Firm other than yours, you must send them a connection request from within TrueFiling 3.0 prior to filing on their behalf.

See [No More TrueFiling Law Firms – Now you'll Connect with other Users](#) on the following page for details on connections.

### The First Time you Log In to TrueFiling 3.0.....

Due to the improved security of TrueFiling 3.0, your existing TrueFiling password won't migrate to the new application. As a result, the first time you log in to TrueFiling 3.0, your first task will be to reset your password.

1. On the Log In page, input the email address you've always used to access TrueFiling.
2. Input your existing TrueFiling password.  
You'll be sent an email that contains a link you'll use to update your password. (You can also click the **Reset password** link on the Log In page.)
3. Open the email and click the link.  
You'll be auto-directed to the Password Reset page in TrueFiling.
4. Input a password of your choosing. The password is case-sensitive.
5. Confirm your password.
6. Click **Change Password**. Your password will be changed, and you'll be logged in.

Be sure to use this password the next time you log in to TrueFiling 3.0.

## **No More TrueFiling Law Firms – Now you'll Connect with other Users**

In TrueFiling 3.0, we've eliminated the "firm." Instead, you'll use "connections." From within TrueFiling, you'll invite co-counsel and firm members who are also TrueFiling login users to become connections. When they accept the invitation, they're granted proxy filing rights on your behalf. Connections have been designed so that you'll be able to file on their behalf as well.

In a similar fashion, you may be invited to "connect" with other TrueFiling login users associated with your organization.

We realize that you may belong to a firm that has many other TrueFiling users. Manually connecting with all your firm members could be time consuming.

To make the transition to TrueFiling 3.0 easier, we'll analyze our user base and automatically make all TrueFiling login users in your firm your connections. Similarly, you'll automatically be a connection to all other TrueFiling login users in your firm. This way, you'll start out with your connection network ready to go.

Existing TrueFiling login users within your firm will be part of your connections network even if they haven't yet performed an initial login for TrueFiling 3.0.

An important result of removing the concept of the "firm" is that there will no longer be a TrueFiling firm administrator. Each user will individually manage their settings, connections, and email addresses/external login accounts.

## **Your Filing and Payment History will be Maintained and Accessible**

You'll still have access to your filing history from TrueFiling 2.0. In TrueFiling 3.0, on the History page, you can select the My History filter to view filings that you filed, as well as filings that were filed on your behalf.

Select the Unsubmitted filter to view your filings (or those created on your behalf) that haven't yet been submitted to the Court.

You can also access and export an existing payment transaction simply by selecting a menu option and specifying the date parameters and output format.

## **User Roles**

In previous TrueFiling releases, when a firm member or co-counsel was invited to join the TrueFiling Law Firm site, the new user was identified by their role in the firm – either an attorney, a contact (employee, staff member, or client), or as a pro per filer.

When you sign up for TrueFiling 3.0, you specify your own role, which can be attorney, court reporter, or pro se (self-represented) filer. It's also possible to register for TrueFiling and not specify a role. If you don't specify a role, however, you can submit a filing only on a connection's behalf.