Montana Courts Electronic Filing – Registration

Note: these instructions were prepared to assist individuals registering as Attorneys, Govt Attorneys, Clerks of District Court, and Authorized Staff for these individuals, as well as Case Participants and Court Reporters. The instructions may not be appropriate in other instances. E-Filing is not enabled for Pro-se litigants at this time.

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Overview

Logging In to E-Filing

Login credentials to the E-Filing system are either a State Employee account or an Okta account. You will use these credentials each time you log on to the E-Filing system. One of the following methods will be required for establishing an E-Filing system account, each of which is explained in more detail below:

1. Register with your existing State Employee Account. These logins are provided for state employees and some other court personnel. They are in the format cu####, cj#### or other similar number. If you have one of these login ID's you must use it to register with and access the E-Filing system. If you have one of these IDs but you do not remember your password, contact your agency's IT department. See page 3.
2. Register with existing Okta credentials. Individuals who use the state File Transfer or other montana.gov services may already have an Okta account. Use your existing Okta account to register and log in to the E-Filing system. See page 4.
3. If you do not have an Okta account or a State Employee account, create an Okta account. After obtaining Okta credentials, use these to register with the E-Filing system. See page 4.
4. If you submit documents to the courts as both a County/City Attorney as well as a private attorney, you may need to register with the E-Filing system twice, as explained more fully on page 5.
5. Pre-registration is required to register as a judge or clerk of district court. The E-Filing system administrator will arrange a time for pre-registration and registration activities for judges and clerks of court.

Registering With the Appropriate Role

During registration you will select an E-Filing system "role." It is important to do this correctly so that you will be able to access case information from within the E-Filing system as well as to file necessary documents. For example, a criminal case will only be initiated by an e-filer who is registered in the role of "Govt Attorney." This section begins on page 5.

You will be presented with a registration screen which requires information to be entered, verification that you are a person (as opposed to a bot) and your agreement to Terms and Conditions. Each of these is described below in more detail.

Verification of Primary Email Address

Note that registration is a two-part or three-part process, depending on your registration role. All registrants will complete the first of the two parts:

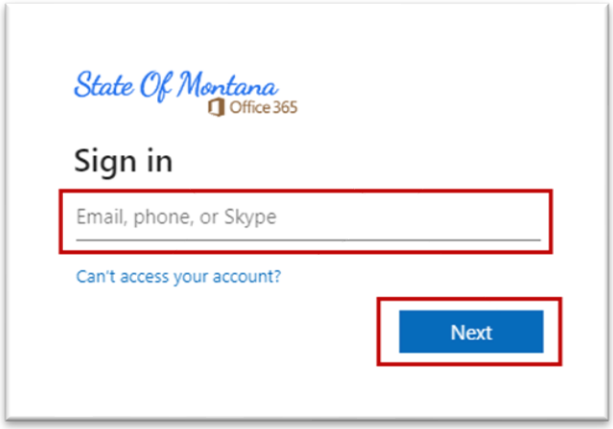
1. Filling in the fields in the registration form and clicking the "Next" button; and
2. Receiving an email in which you must click a link to finalize your registration.
3. If you register in the role of "Authorized Staff" you must then also have the principal, for whom you are authorized staff, add you to his/her account. This is described in more detail on page 9.

Access the E-Filing system at: **https://mtefile.courts.mt.gov/login**

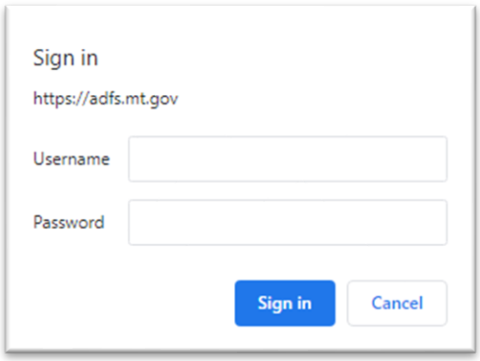
Click the "login·mt·gov" image to begin.

Registering as a State Employee

If you have a State Employee Account, you must use it to register and access the E-Filing system. Enter your state email address and click the "next" button to continue.

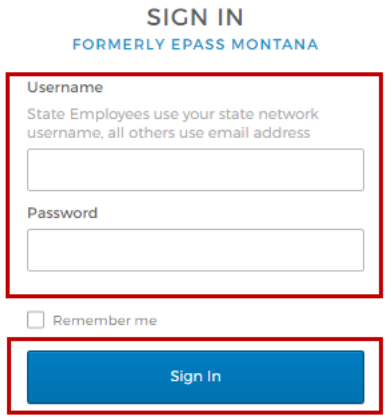


Use your State Employee login ID and password. These login IDs are in the format cu#### or cj#### or similar. If you have such a login but do not remember your password, contact your agency's IT department. Click the "Sign in" button. Skip to page 5 to continue registration instructions.



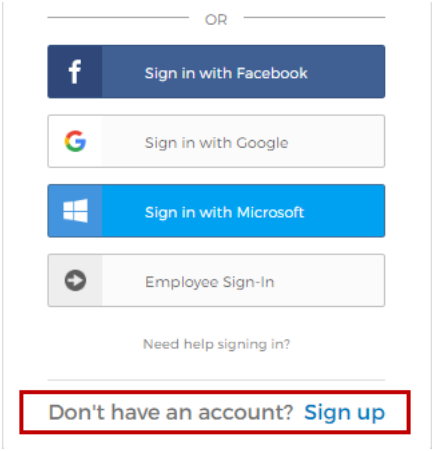
Registering With Okta as a non-State Employee

If you do not have a State Employee Account, but you have an Okta Montana Account, enter your email address and password associated with your Okta account and click the “Sign in” button. Skip to page 5 to continue registration instructions.

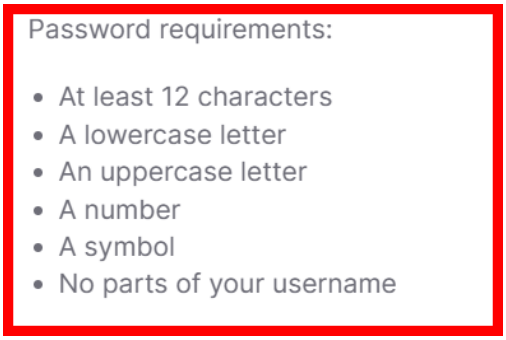


Creating an Okta Account

If you do not have either a State Employee Account or an Okta Account, you will be able to create an Okta Account by selecting the “Sign up” button.



You must fill out information relative to your name, phone, email contact information and a password that meets specific criteria. These criteria are listed once you begin typing a password.



A verification email will be sent to the email address you used to register. You must click "Activate Account" on that email to complete the Okta registration process.

Upon finalizing your Okta Montana account, you will be presented with the Montana Courts E-Filing system registration page.

Montana Courts E-Filing Registration Page

The first time you log in to the E-Filing system, you must register, selecting an e-filing role and entering information that the system will use to serve you with notifications and otherwise communicate with you.

User Information and Registration Role

It is important to register using the correct E-Filing role. This document addresses registration for the following roles:

- *Attorney* – You must be registered with the Montana State Bar. Enter your name exactly as it is registered with the Bar and provide your Bar ID.
- *Govt Attorney* – if you are, or practice in the office of, a County or City Attorney or Attorney General, register as a Govt Attorney. The role of Govt Attorney is the only one that permits the submission of initiating documents in criminal and other govt attorney-initiated civil cases (juvenile, dependent neglect, civil commitments). Enter your name exactly as it is registered with the Bar and provide your Bar ID.
- *Part-time County/City Attorney who also practices as a private attorney* – If you regularly file as a govt attorney in addition to filing as a non-govt attorney (i.e., an attorney in private practice) you should register twice, once as a Govt Attorney and once as an Attorney. Your email addresses must be different for each registration. It will also allow you access to those cases that match the logged-in role when performing a case search.
- *Authorized Staff* – If you are a staff member who is authorized to submit documents on behalf of a govt attorney, attorney, justice, judge or clerk, register with the role of Authorized Staff. Enter your name as you wish it to appear on legal documents. When you have completed your registration, your name will be available to add to the list of authorized users for the principal filer. The principal filer must then add the Authorized Staff in the "My Account" area of the principal's home screen.
- *Case Participant* - An authorized reporting agency may register as a Case Participant. This does not include Pro-se litigants. E-Filing for Pro-se litigants is not enabled at this time.
- *Court Reporter* – Register as a Court Reporter to be allowed to file and be served electronically. This allows you to submit documents to specific cases by typing in the exact case number of the specific case, but it does not allow access to the case file itself.

Pre-Registration for Court Personnel

Judges and court clerks only, contact the e-filing system administrator directly to get registered in your appropriate roles. Please e-mail: efilingtechsupport@mt.gov

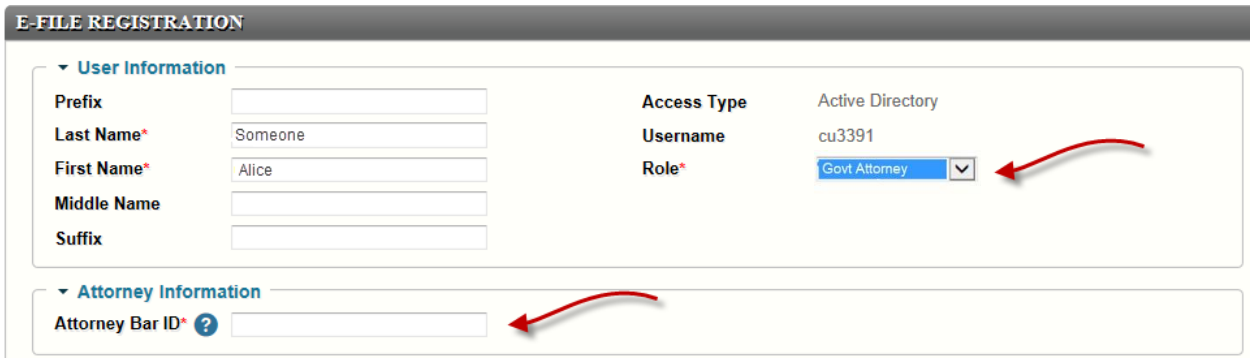
Registering as an Attorney

1. Select the Role of "Attorney."
2. **Enter your name in the name fields exactly as it is registered with the Montana State Bar**.
3. Enter your Attorney Bar ID.

The system will validate your name and Bar ID against the Roll of Attorneys maintained by the State Bar. This presents a first barrier to those who may be attempting to gain unauthorized access to the E-Filing system.

Continue to fill in the rest of the fields.

Registering as a Govt Attorney

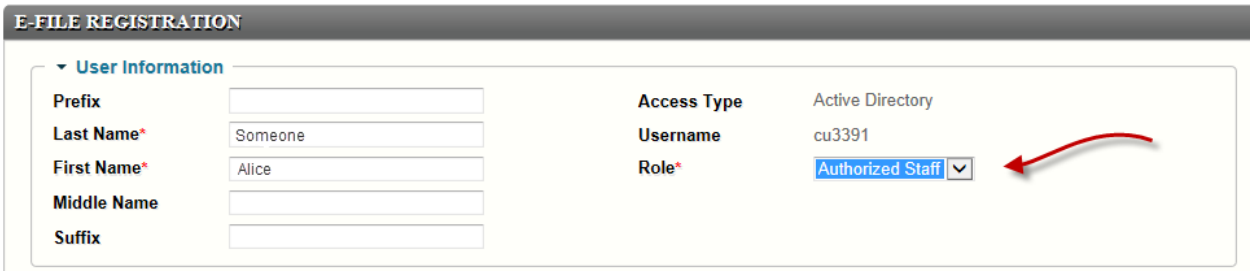


4. Select the Role of "Govt Attorney."
5. **Enter your name in the name fields exactly as it is registered with the Montana State Bar**.
6. Enter your Attorney Bar ID.

The system will validate your name and Bar ID against the Roll of Attorneys maintained by the State Bar. This presents a first barrier to those who may be attempting to gain unauthorized access to the E-Filing system.

Continue to fill in the rest of the fields.

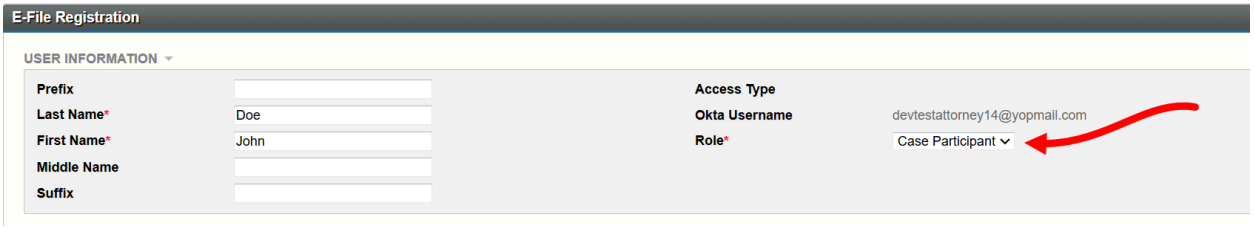
Registering as Authorized Staff



Enter your name as you wish it to appear on legal documents. You are not required to enter a Bar ID.

Continue to fill in the rest of the fields.

Registering as a Case Participant



Enter your name as you wish it to appear on legal documents. You are not required to enter a Bar ID.

Registering as a Court Reporter

Enter your name as you wish it to appear on legal documents. You are not required to enter a Bar ID.

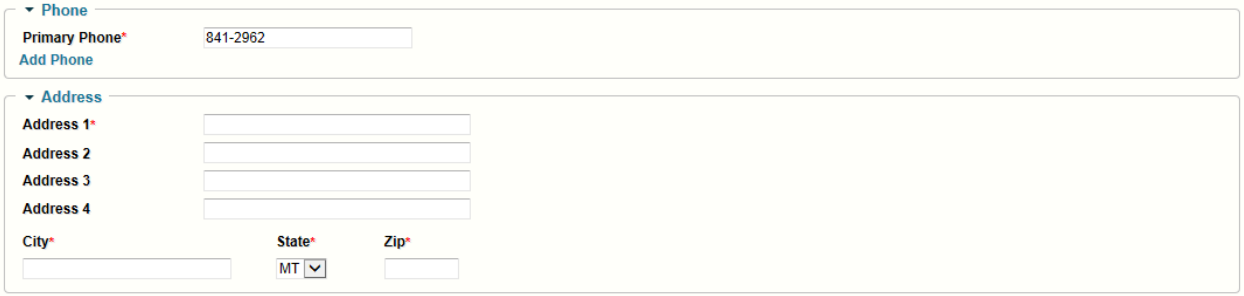
Account information

Email

The email address associated with your State Employee or your ePass Montana Account is displayed in the **Primary Email** field. This email address is the one that will be used to send you confirmation of your electronic filings and other messages from the E-Filing system. It is also the email address used to send the link to finalize your registration.

Use the **Secondary Email** field if desired. A strategy could be employed which uses a group email address as the Secondary Email field for all office staff, which would then contain all E-Filing system messages and could be centrally monitored.

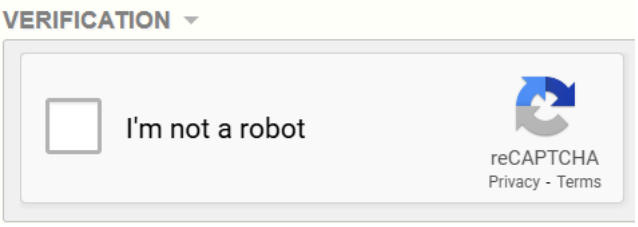
Phone and Address



Enter your office phone number in the field "Primary Phone." Additional phone numbers may be entered by clicking on the "Add Phone" link and entering the numbers, but there is little need to do so.

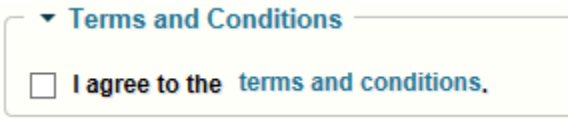
Enter your office address in the appropriate Address fields. Fields with a red asterisk are required to be filled in.

Verification That You Are a Person and Not a Bot



CAPTCHA™ ensures that you are a person rather than a bot. You must check the box to verify that you are not a bot. You may be asked to click a series of boxes or retype text to prove you are not a bot.

Agreement to Terms and Conditions

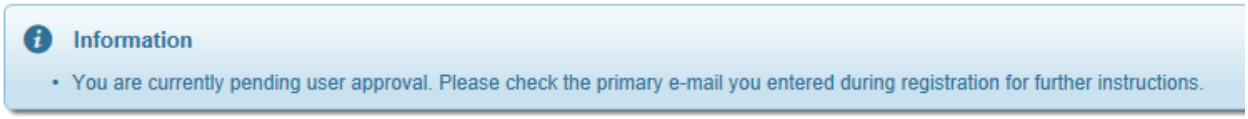


You must check the box indicating that you agree to the statewide Montana Courts E-Filing Terms and Conditions.

Click the "Next" button at the bottom right of the screen. You may receive an error message at the top of the screen if you have not filled in required fields, if the Bar ID does not match the name given or if the CAPTCHA™ routine does not authorize the text you typed.

Primary Email Verification

If you have successfully filled out the registration page, clicking the "Next" button brings you to this message:

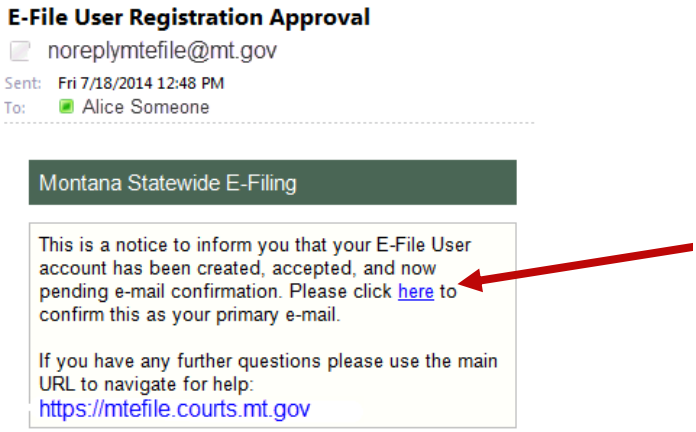


This completes the first of the two-part registration process. The two-part registration assures that you have registered with a valid email address.

As the message indicates, you must now check the email account you listed as your primary email account when filling out the registration page.

It might take a moment or two for the confirmation email to arrive in your inbox. You may also want to check the junk mailbox and confirm as "not junk" if the confirmation email arrives there.

The confirmation email will look similar to this:



If you hover over the "here" link, it will look similar to this (with a different id number):

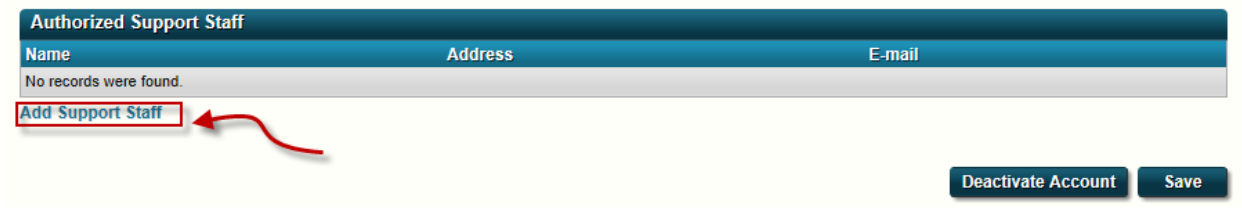
Click the "here" link to complete the registration. You will be taken to the E-filing login page, or your home page will automatically open.

Adding Authorized Staff

If you are registering with the role of "Authorized Staff," inform the individual on whose behalf you will use the system that you are now successfully registered.

Those registered with the role of Attorney, Govt Attorney, Judge, Justice and Clerk of Court may add authorized users. **Authorized users will have full and complete access to your E-Filing account** with the single exception being that they will not be able to add or remove authorized users. They may submit legal documents on your behalf. The signature on an automatically generated Certificate of Service will read "Electronically signed by [Authorized Staff] on behalf of [name of principal]."

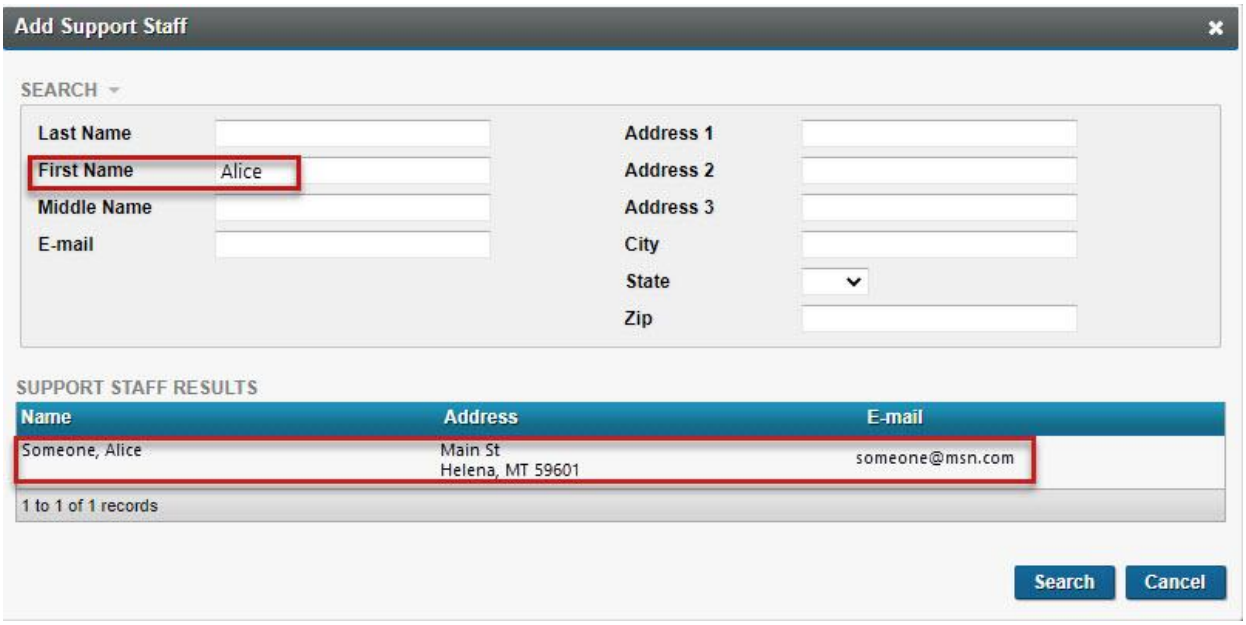
To add an authorized user, log in to your account and use the drop-down by your name to bring up "My Account."



At the bottom of the screen, click on the Add Support Staff link.

Fill in at least one of the fields in the search screen to bring up a list of individuals who are registered with the E-Filing system with the role of "Authorized Staff." Do not try to fill in all the search fields- last name only will suffice. (Filling in too many fields could limit the search much and yield too-narrow results.) Click on the correct staff member's account from the search results. Click "Save."

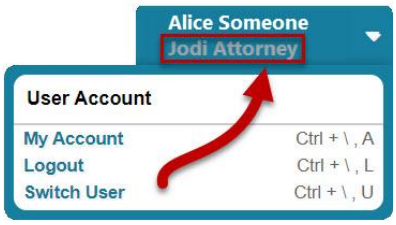
Click on the Search button to bring up a list of Authorized Staff who match your search criteria.



Click on the line containing the Support Staff you want to add. The individual will be added as Support Staff on your account page. **You must click the Save button to save your changes.**

An individual may be an Authorized Staff for multiple principals. Such an individual must pay attention to the logged-in user area at the top right of the screen which will indicate on whose behalf the authorized staff is searching or submitting information.

That area of the screen will look something like this:



The names of the other principals are available by using the drop-down next to the user's name and clicking on Switch User, then the desired name.

Setting the "Notification Type"

All registered users may set their "Notification Type" in their "My Account" screen.

There are two types of notifications that are routinely created by the E-Filing system.

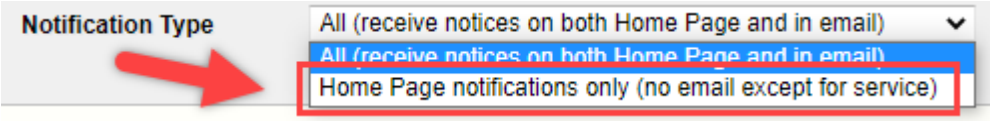
1. "System notices" regarding filings having been submitted and notices and submissions having been either approved or rejected by the Clerk of Court.
2. Notification of legal service from the E-Filing system.

Notification of service will always come to the Primary and Secondary Email Addresses that are stored in the "My Account" page. Also note that a widget on the e-filer's home page can be displayed to list recent "Service Received" notifications.

The "system notices" may be received in one of the following ways:

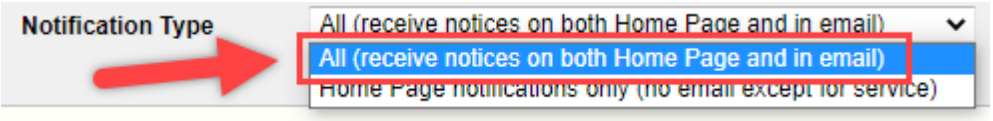
- From the e-filer's home page only. This works well for many e-filers in that the notices are available from the e-filer's home page, but each submission and approval/rejection notice is not filling the email boxes of both the primary and secondary email addresses. Notice of service will still be received at the primary and secondary email addresses.

Select this option:

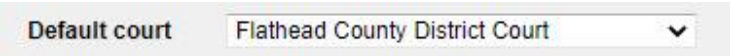


- Both email and home page notifications. If an e-filer would like to receive notice on both the home page as well as via email messages, choose this option.

  Select this option:



Setting a Default Court

All registered users may set their "Default Court" in their "My Account" screen.

When searching for cases or creating a new filing, the court selection field will be auto-populated with your default court.