Montana Courts Electronic Filing – Registration

Note: these instructions were prepared to assist individuals registering as attorneys, prosecutors, clerks of district court and authorized staff for these individuals, as well as court reporters. The instructions may not be appropriate in other instances.

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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 ePass 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 IDs 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 ePass credentials. Individuals who use the state File Transfer or other montana.gov services may already have an ePass account. Use your existing ePass account to register and log in to the E-Filing system. See page 4.
3. If you do not have an ePass account or a State Employee account, create an ePass account. After obtaining ePass credentials, use these to register with the E-Filing system. See page 5.
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 6.
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 "Prosecutor." This section begins on page 6.

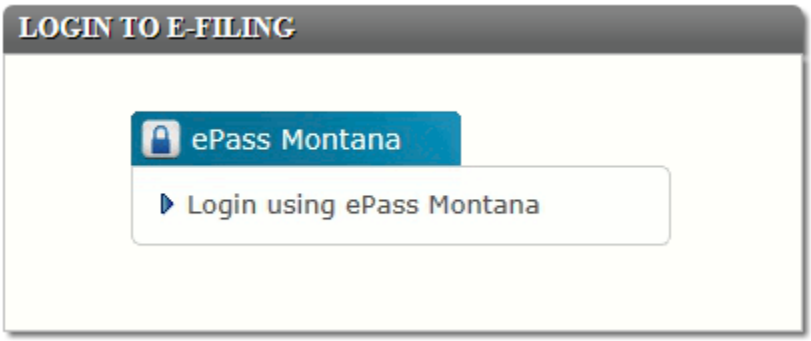
You will be presented with a Registration screen which requires information to be entered, verification that you are a person (as opposed to a bot) and your agreement to Terms and Conditions. Each of these is described below in more detail.

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:

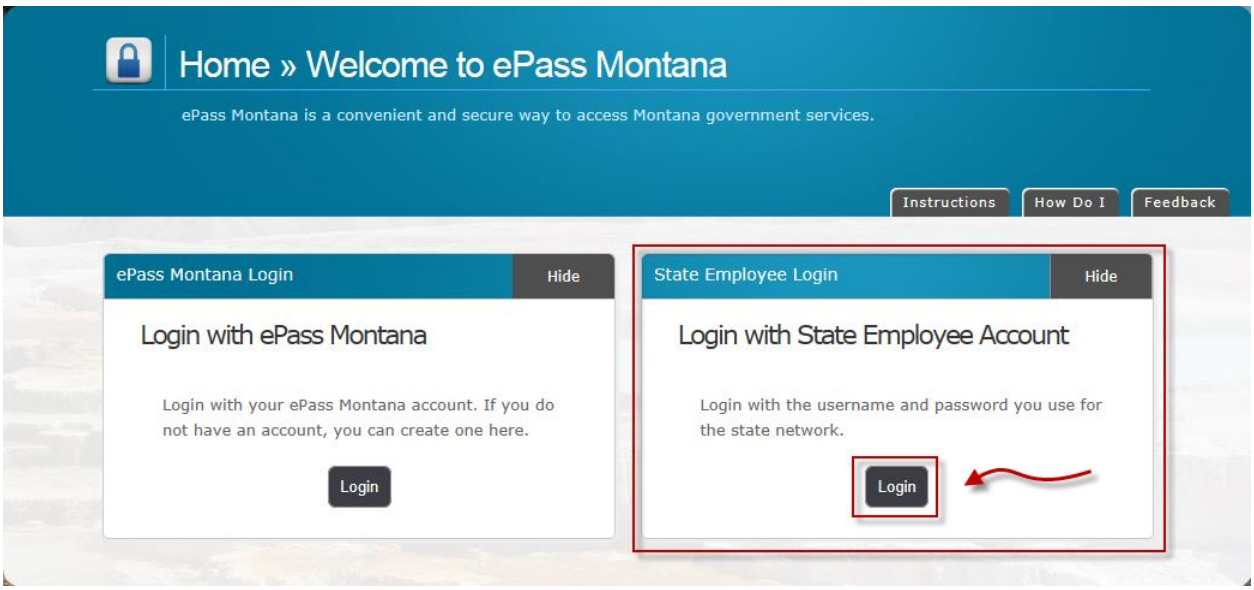
1. Filling in the fields in the registration form and clicking the "Next" button; and
2. Receiving an email in which you must click a link to finalize your registration.
3. If you register in the role of "Authorized Staff" you must then also have the principal, for whom you are authorized staff, add you to his/her account. This is described in more detail on page 12.

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

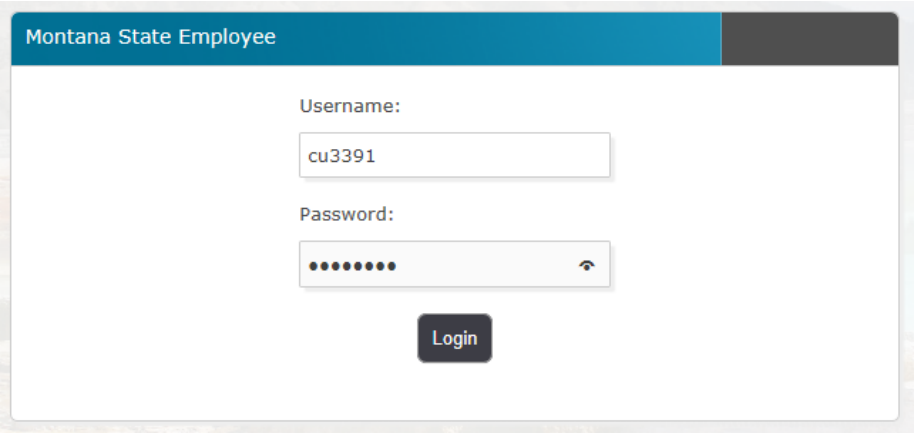


Click the ePass Montana link to begin.

Registering With a State Employee Account

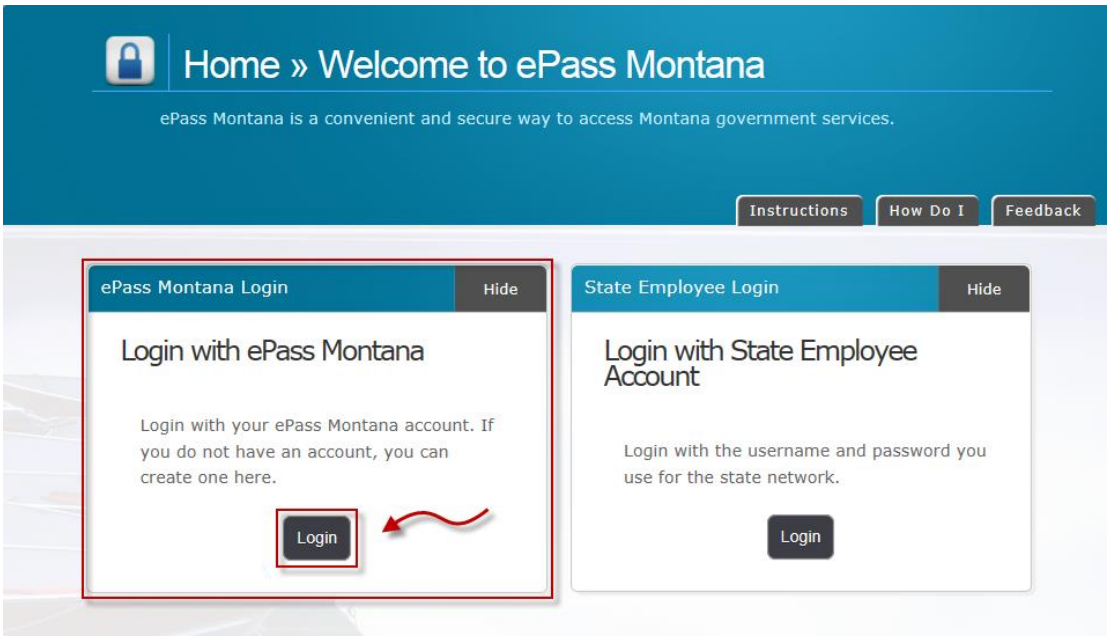


If you have a State Employee Account you must use it to register and access the E-Filing system. These login IDs are in the format cu#### or cj#### or similar. If you have such a login but do not remember your password, contact your agency's IT department. Select "Login with State Employee Account."

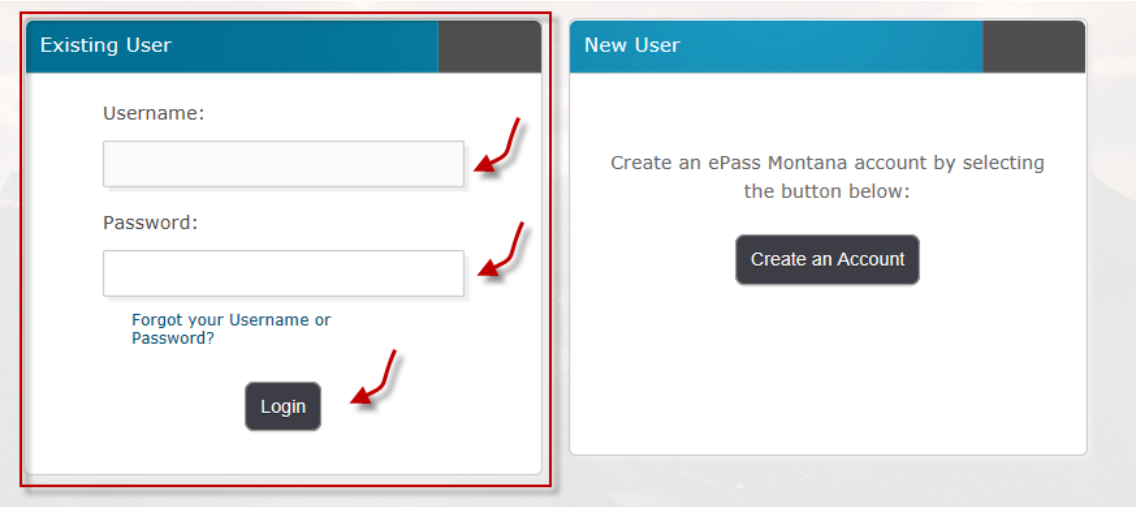


Enter your cj#### and password combination. Use the password that you always use when entering your cj####. Click the "Login" button. Skip to page 6 to continue registration instructions.

Registering With an ePass Account

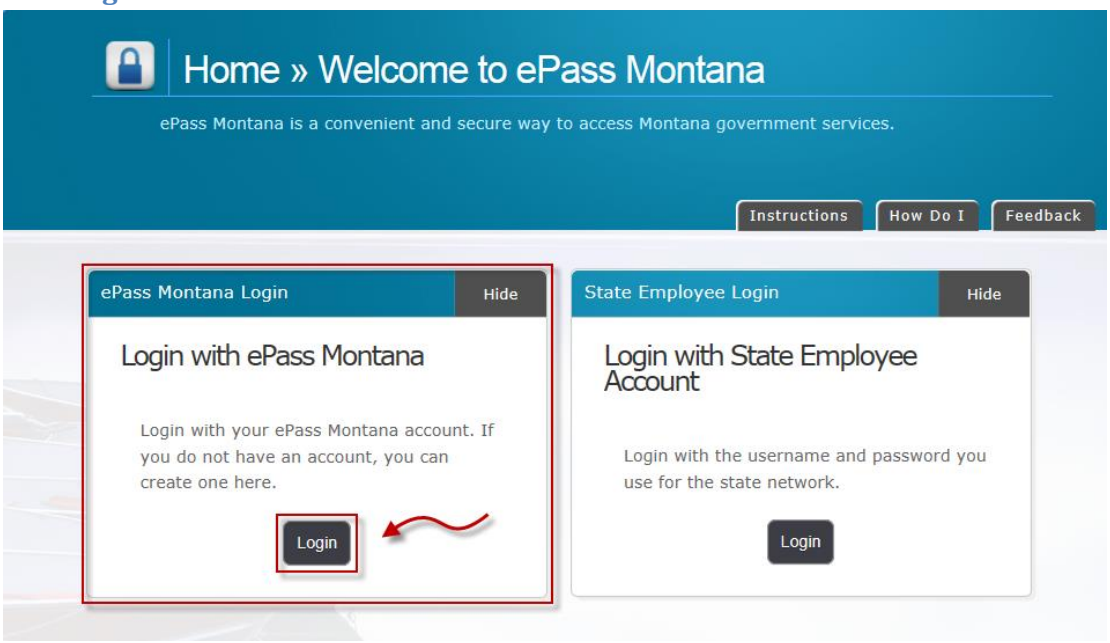


If you do not have a State Employee Account, but you have an ePass Montana Account, select the option to "Login with ePass Montana."

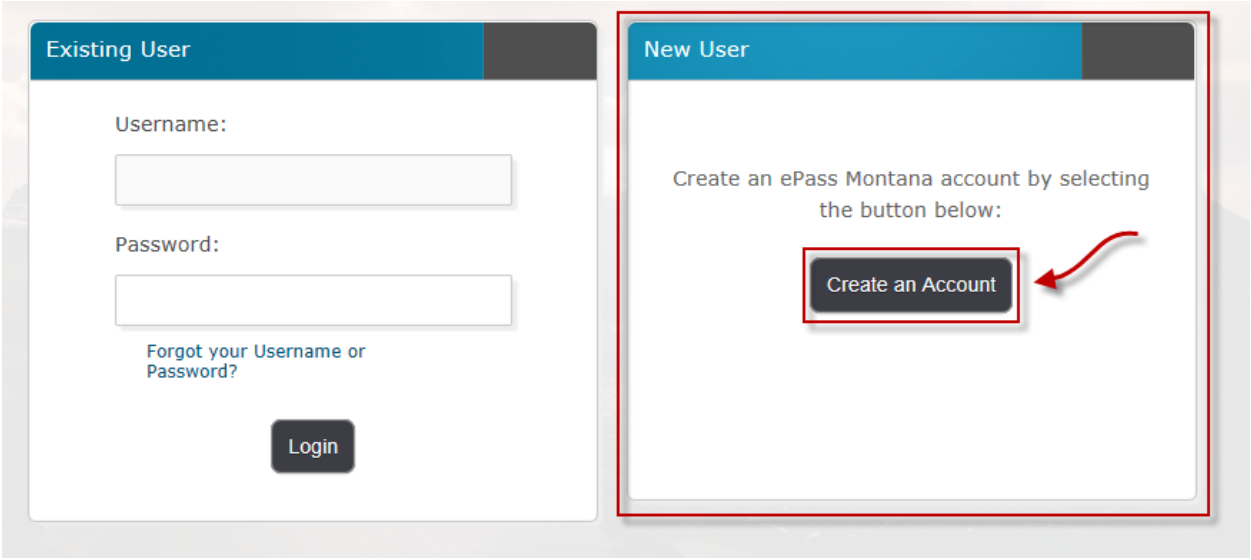


Enter your ePass username and password and click on the "Login" button. Skip to page 6 to continue registration instructions.

Creating an ePass Account

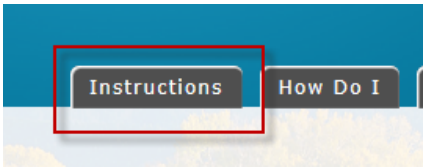


If you do not have either a State Employee Account or an ePass Account, you will be able to create an ePass Account by selecting the option to "Login with ePass Montana."

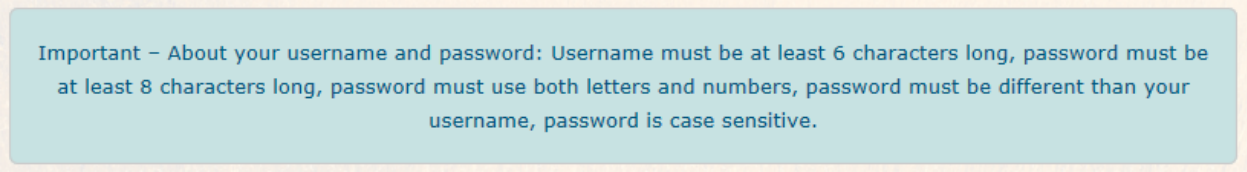


Select the option to "Create an Account."

Instructions for creating the ePass Montana account are available in the "Instructions" tab once you have selected the option to Create an Account.



In general, you must fill out information relative to your name, phone and email contact information and security questions on the left portion of the page. At the top right of the page, you must select a Username and Password that meet specific criteria. These criteria are listed at the top of the account creation page.



Upon finalizing your ePass 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. See page 7.
- *Prosecutor* – if you are, or practice in the office of, a County or City Attorney or Attorney General, register as a Prosecutor. The role of Prosecutor is the only one that permits the submission of initiating documents in criminal and other prosecutor-initiated civil cases (juvenile, dependent neglect, civil commitments). Enter your name exactly as it is registered with the Bar and provide your Bar ID. See page 8.
- *Part-time County/City Attorney who also practices as a private attorney* – If you regularly file as a prosecutor in addition to filing as a non-prosecutor (i.e., an attorney in private practice) you should register twice, once as a Prosecutor and once as an Attorney. Your email addresses must be different for each registration. This will allow you to maintain confidentiality of files from one office to the other if you have separate office staff. It will also allow you access to those cases that match the logged-in role when performing a case search. See page 7 and 8.
- *Authorized Staff* – If you are a staff member who is authorized to submit documents

on behalf of a prosecutor, 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. See page 8.

- *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. See page 8.
- *Pre-registration* by the E-Filing system administrator is required for Supreme Court Justices and Clerk of Court, District Court Judges and Clerks of District Court, and Judges of limited jurisdiction courts. Contact the E-Filing system administrator to begin pre-registration. See page 9.

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. See page 9.

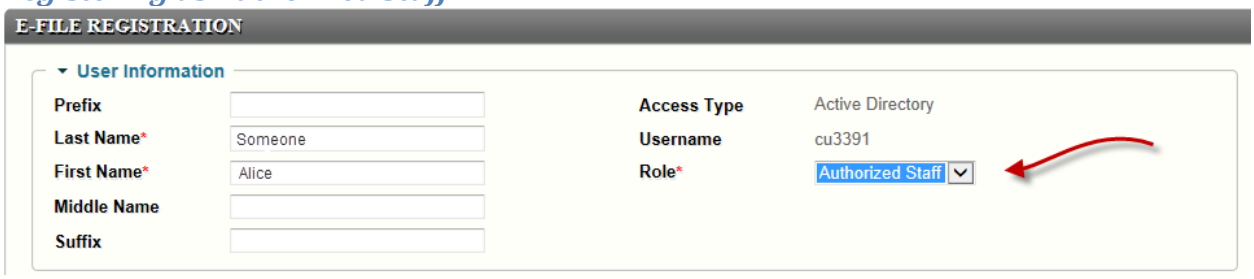
Registering as a Prosecutor

4. Select the Role of "Prosecutor."
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. See page 9.

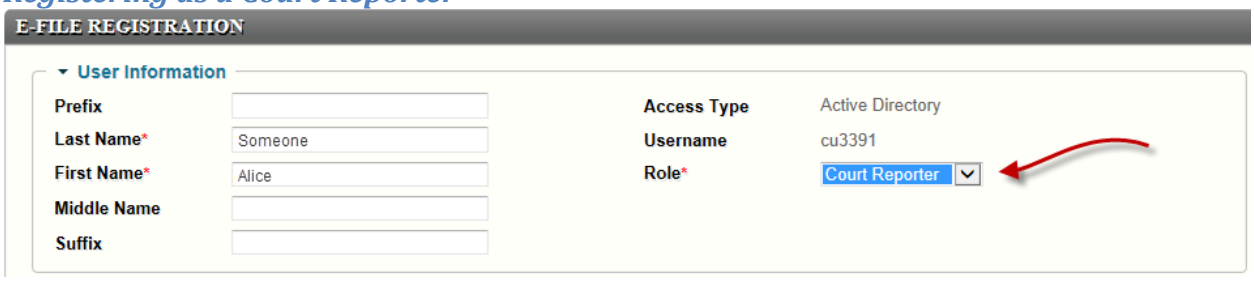
Registering as Authorized Staff



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. See page 9.

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.

Continue to fill in the rest of the fields. See page 9.

Pre-Registration for Court Personnel

Contact the E-Filing System Administrator to arrange for an email to be sent to your primary email address. A link in this email will take you to a registration page (similar to what is show in the screen images above) that will have your Role pre-populated and unable to be changed.

Enter your name as you wish it to appear on legal documents. Complete the rest of the registration form.

Continue to fill in the rest of the fields as described below.

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

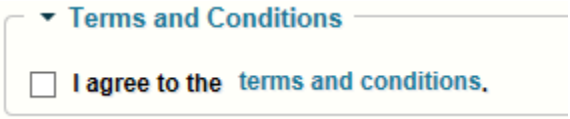
Enter your office phone number in the field “Primary Phone.” Additional phone numbers may be entered by clicking on the “Add Phone” link and entering the numbers, but there is little need to do so.

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 type the text you see or use the "audio" button and type what you hear. If you cannot discern the text that is displayed, you may click on the "refresh" button to have the text replaced.

Agreement to Terms and Conditions

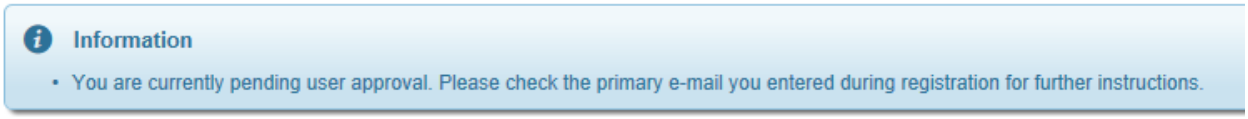


You must check the box indicating that you agree to the statewide Montana Courts E-Filing Terms and Conditions.

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 mail box and confirm as "not junk" if the confirmation email arrives there.

The confirmation email will look similar to this:

E-File User Registration Approval

noreplymtefile@mt.gov

Sent: Fri 7/18/2014 12:48 PM

To: Alice Someone

Montana Statewide E-Filing

This is a notice to inform you that your E-File User account has been created, accepted, and now pending e-mail confirmation. Please click here to confirm this as your primary e-mail.

If you have any further questions please use the main URL to navigate for help:
https://mtefile.courts.mt.gov

Do not respond to this system-generated e-mail notification. For help with technical problems, please e-mail [redacted]

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

https://mtefile.courts.mt.gov
approve/user/approveuser?
id=lotfbkpbgtjot6vlvyniqciu8ddt5mtkp6y
40fwrf7c=
Click to follow link

Click the "here" link to complete the registration. You will be taken to the following screen from which you can log in to your E-Filing home page, or your home page will automatically open.

MONTANA STATEWIDE E-FILING

Success

- You are now officially approved to use the E-File system.

LOGIN TO E-FILING

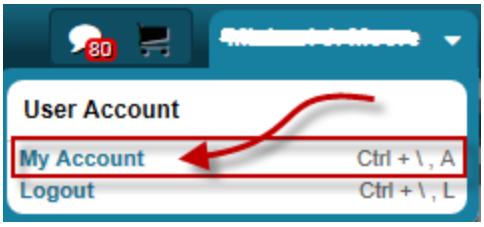
ePass Montana

Login using ePass Montana

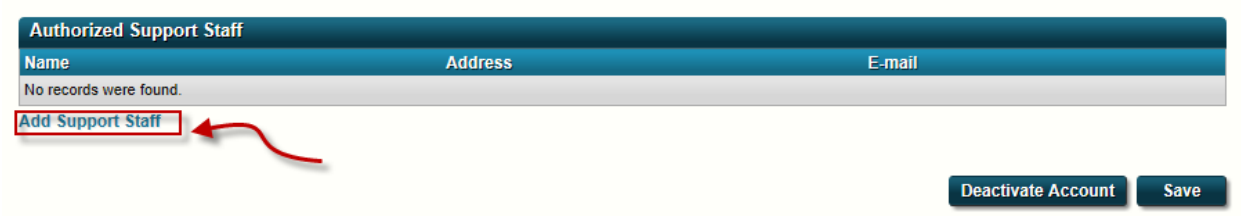
Adding Authorized Staff

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.

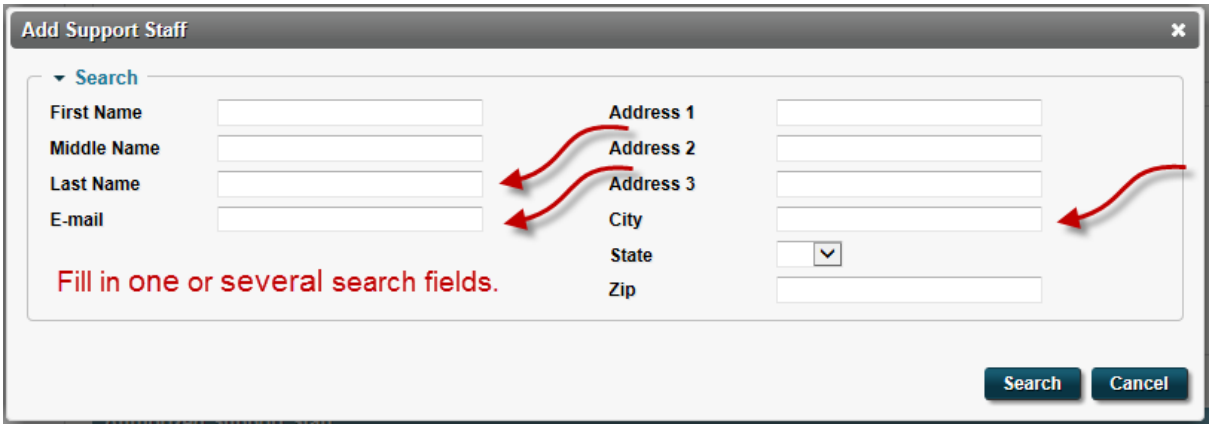
Those registered with the role of Attorney, Prosecutor, Judge, Justice and Clerk of Court may add authorized users. **Authorized users will have full and complete access to your E-Filing account** with the single exception being that they will not be able to add or remove authorized users. They may submit 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."

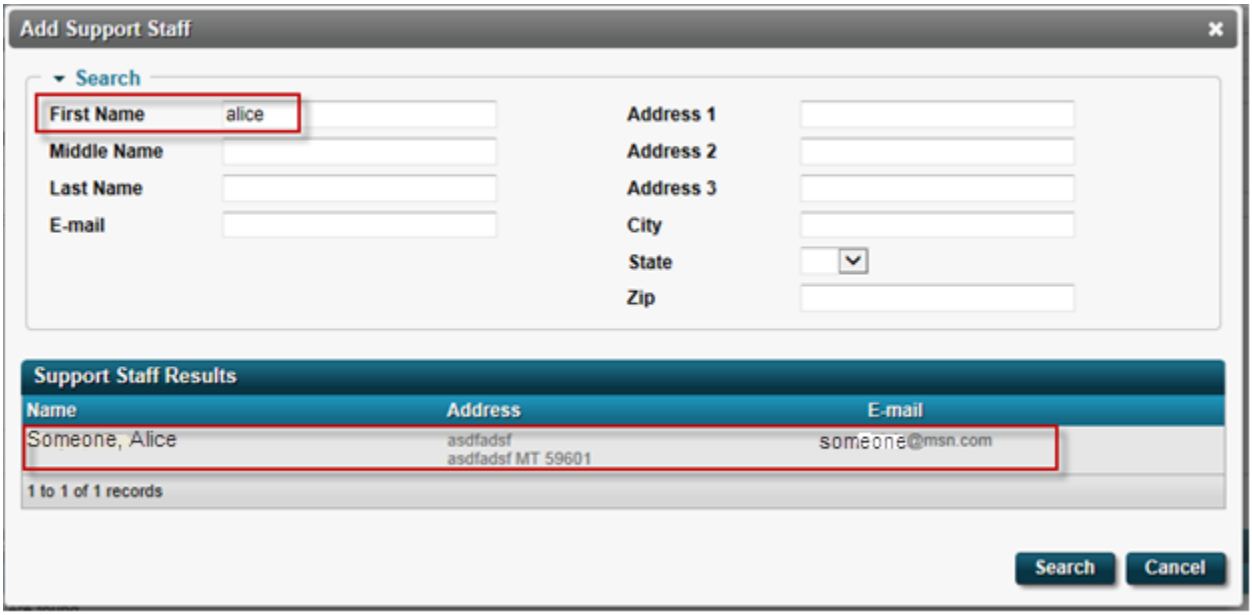


At the bottom of the screen, click on the Add Support Staff link.



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." It will be most convenient if you search on an "uncommon" value. For instance, searching for a First Name of "John" might yield many results, while searching for the Last Name "Minderbinder" will narrow the results considerably.

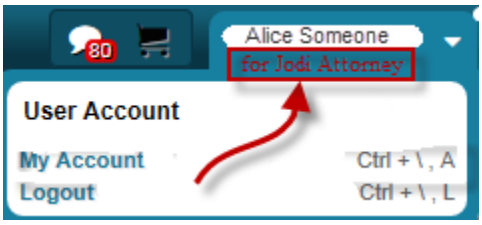
Click on the Search button to bring up a list of Authorized Staff who match your search criteria.



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 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.

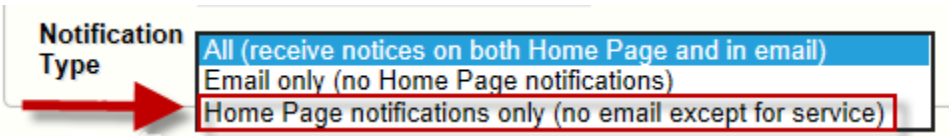
1. "System notices" regarding filings having been submitted and notices and submissions having been either approved or rejected by the Clerk of Court.
2. Notification of legal service from the E-Filing system.

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:

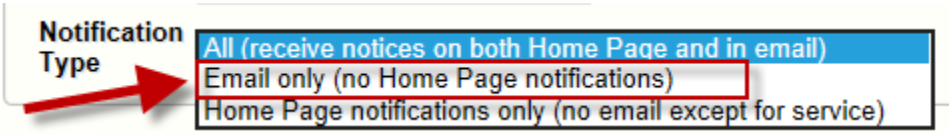
- From the e-filer's home page only. This works well for many e-filers in that the notices are available from the e-filer's home page, but each submission and approval/rejection notice is not filling the email boxes of both the primary and secondary email addresses. Notice of service will still be received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

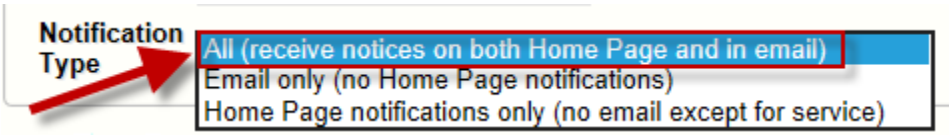
  Select this option:

- Via email only. Notices of submission and approval/rejection would not be available from an e-filer's home page but would be delivered to the primary and secondary email addresses only. Notice of service will still be received at the primary and secondary email addresses.

  Select this option:

- Both above methods. If an e-filer would like to receive notice on both the home page as well as via email messages, this option is available.

  Select this option: