

ProDoc eFiling

A Guide to Registering for eFiling in Texas State Courts

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Overview:

The eFiling system for state courts in Texas has been in existence for over ten years. The system allows filers to select and eFile through an eFiling Service Provider, (EFSP). The EFSP collects the filing information and documents and transmits them to the State's eFiling Manager, (EFM) who forwards the information and documents to the appropriate jurisdiction. The court clerk then reviews the information and documents. The clerk will either approve the filing or return the filing for corrections.

If the filing is Rejected or Returned for Correction, the filer will receive an email which will include the clerk's instruction to the filer. If the filing is accepted the filer will receive an email with a link to the date stamped, downloadable document.

The Supreme Court adopted statewide Rules of Procedure eFiling in [Civil Courts](#) effective January 1, 2014 and for [Criminal Courts](#) effective May 1, 2017. The rules govern such items as the date and time of a filing when eFiled, what documents can and cannot be eFiled, acceptable electronic formats for eFiling and other aspects of eFiling and eService.

The Judicial Committee for Internet Technology has standardized many aspects of the eFiling process. The eFiling [Technology Standards](#) includes lists that detail much of the data required by eFiling. Including case categories, case types, required parties, filing types, court services, reasons for returning a filing and reason for rejecting a filing. Jurisdictions all use these lists and cannot add to the list.

Before eFiling we suggest you follow these steps to adopt eFiling in your practice:

- Attend a live, [MCLE certified live webinar training class](#)
- Read over this guide
- Register for eFiling
- Review the [Jurisdiction Specific Information](#) for the jurisdiction you will be eFiling in
- eFile

If you encounter any problems, contact our customer support team. Email efile-manager@thomsonreuters.com or call 800.759.5418.

Register for eFiling

Preparation and Tips

The eFiling system is set up to include a firm and then filers, attorneys and service contacts within that firm.

A service contact can be attached to a case to receive eService notifications on that case.

Firms are considered owners of all eFilings made in their name. A filer will only have access to the eFilings and documents for the firm of which he/she is currently a member.

A single person can be a filer and/or an attorney and/or a service contact.

The person setting up the firm will automatically become a firm eFiling Administrator.

One or more filers must be designated as the firm eFiling Administrator. The firm eFiling Administrator can:

- Edit firm information;

- Add filers, attorneys and service contacts to the firm;

- Unlock filer accounts and reset passwords;

- Create payment accounts for the firm;

- Designate other filers as additional firm eFiling Managers;

- Access reports containing all firm eFilings.

ProDoc suggests that a firm have at least two firm eFiling Administrators when possible because of the importance of this function in the system.

A filer's User ID is their email address. The system does not allow duplicate email addresses.

Attorneys must enter a Texas State Bar number. The system will validate bar numbers against a list provided by the State Bar of Texas.

At least one payment account must be set up for the firm before eFiling can begin.

Register Firm and firm eFiling Administrator

At the [ProDoc eFiling Home Page](#), select Register for eFiling.

Complete the Firm Information entry fields. All * fields are required.

Complete the eFile Firm Manager information fields.

Be sure to remember your Password.



Home **Register for eFiling** Resources

Register a new firm by filling out the form below. When you are finished, click "Continue" at the bottom of the page to continue to your User Registration.

Required fields are bold and marked with an asterisk (*).

| Firm Registration | |
|---|--|
| Firm / Organization Information | |
| Name* | <input type="text"/> |
| Country* | <input type="text" value="United States"/> |
| Address Line 1* | <input type="text"/> |
| Address Line 2 | <input type="text"/> |
| City* | <input type="text"/> |
| State* | <input type="text" value="Texas"/> |
| Zip* | <input type="text"/> |
| Phone* | <input type="text" value="XXX-XXX-XXXX"/> |
| Firm Administrator Information | |
| Email Address* | <input type="text"/> |
| Your Email Address will be used as your Log In | |
| Re-type Email Address* | <input type="text"/> |
| The State eFiling system requires your password to be at least 8 characters with one lower character one upper character and one symbol. | |
| Password* | <input type="text"/> |
| Re-type Password* | <input type="text"/> |
| First Name* | <input type="text"/> |
| Middle Name | <input type="text"/> |
| Last Name* | <input type="text"/> |
| <input type="checkbox"/> Firm Admin is an Attorney <input type="checkbox"/> Add Firm Admin to Service Contact List | |
| Optional Information | |
| <input type="checkbox"/> Require Matter Number/Description for all eFilings | |
| Please email us if you are Sales Tax Exempt with the following link (You must provide Texas Sales and Use Tax Exemption Certification) | |
| Email us | |
| Firm Agreement | |
| Click here for a printable version | |
| ProDoc® Subscriber Agreement for Firms Access to and use of ProDoc eFiling Service is subject to the terms and conditions of the ProDoc License Agreement ("Agreement") for Firms, a legal document between the firm you represent ("Firm" or "Subscriber") and West, a Thomson Reuters business ("West"). Please read the Agreement. If you agree with the terms and conditions of the Agreement and agree to be bound by them, accept the terms by clicking on "I Agree" below and continue with the software installation. If you do not agree with the terms and conditions of the Agreement, click on "I Don't Agree" and you will not be able to install the software or use the service. 1. DEFINITIONS a. Service - Means the ProDoc eFiling service, and any related software, servers, products or services provided to Firm by West to assist Firm with electronically filing and electronically serving legal documents and in performing related tasks. b. Firm Account - Means a single administrative account with West through which the Service is provided under this Agreement. c. Firm - Means the legal entity through which the Firm Account is established and maintained. d. Individual User Account - Means the account of a single person who is a registered Licensee. e. Electronic Filing Manager ("EFM") - Means the manager of the electronic filing system on behalf of the specific state. f. Effective Date - Means the date that the Agreement accepted by the Firm. g. You - Means the person accepting this Agreement on behalf of the Firm and establishing the Firm Account as described | |
| Name of Person Agreeing: | <input type="text"/> |
| <input type="checkbox"/> I Agree <input type="checkbox"/> I Don't Agree | |
| <input type="button" value="Continue"/> | |

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If you are registering as an Attorney, click on the box next to Firm Admin is an Attorney.

Enter your State Bar of Texas Bar Number. The number you enter will be validated by the State eFiling Manager against a list provided by the State Bar of Texas.

First Name* Steve
 Middle Name
 Last Name* Schenk
 Bar Number* Please enter a Bar Number
 Firm Admin is an Attorney

If you will be a [Service Contact](#), click on the box beside Add Firm Admin to Service Contact List.

Let us know if your organization will be exempt from State Sales Tax on your eFiling transactions by clicking on the 'Email us' link.

Be sure to send us your [Texas State Sales and Use Tax Exemption Certificate](#) and firm name. **We must have that in hand before exempting your organization.**

Review the [Firm Agreement](#), and sign or initial the Name of Person Agreeing box.

Select I Agree and press Continue.

Firm Agreement

[Click here for a printable version](#)

ProDoc® Subscriber Agreement for Firms Access to and use of ProDoc eFiling Service is subject to the terms and conditions of the ProDoc License Agreement ("Agreement") for Firms, a legal document between the firm you represent ("Firm" or "Subscriber") and West, a Thomson Reuters business ("West"). Please read the Agreement. If you agree with the terms and conditions of the Agreement and agree to be bound by them, accept the terms by clicking on "I Agree" below and continue with the software installation. If you do not agree with the terms and conditions of the Agreement, click on "I Don't Agree" and you will not be able to install the software or use the service. 1. DEFINITIONS a. Service - Means the ProDoc eFiling service, and any related software, servers, products or services provided to Firm by West to assist Firm with electronically filing and electronically serving legal documents and in performing related tasks. b. Firm Account - Means a single administrative account with West through which the Service is provided under this Agreement. c. Firm - Means the legal entity through which the Firm Account is established and maintained. d. Individual User Account - Means the account of a single person who is a registered ...

Name of Person Agreeing:

I Agree
 I Don't Agree

You and your firm are now registered in the State's eFiling System. You will need to Activate your account before being able to log into the eFiling system.

[Activate Firm eFiling Administrator Account](#)

After you complete the registration page and press continue an email will be sent to the email address that you registered.



New User Activation

You have been registered with the E-Filing System. Please, click on the link below to activate your account.

[Click to Activate Account](#)

Please update your password after you log into your account.

For technical assistance, contact your service provider



Online: <https://prodocefile.com>
Phone: (800) 759-5418
Available 24x7 and online with chat

Please do not reply to this email. It was automatically generated.

Click where indicated to be taken to this site-



Click on Sign in now to be taken to ProDoc eFiling. Now you can log in with the email address and password that you registered.

Adding Filers with option to add as Attorney and/or Service Contacts

Preliminary information

The firm eFiling Administrator must register all additional firm filers, attorneys and service contacts.

Every new filer must activate their account.

If a filer has already registered, that filer must disassociate themselves from their current firm. See [Adding Filers with existing eFiling accounts Changing Firms](#).

Only filers can log into the system, i.e. Attorneys and Service Contacts cannot log into the system. Anyone who will eFile or will need to view information in the eFiling system should be registered as a filer.

Registering filers

A firm eFiling Administrator logs into ProDoc eFiling

Select Filers under the Firm Management tab

Click Add New Filer

Enter the filer's first, middle (optional) and last names

Enter the filer's email address and validate this by re-entering the email address

If this filer is an attorney, click the box by Filer is an Attorney and enter the Attorney's Texas State Bar Number

Also see [Enter Attorney Filer Delegates](#) below.

If this filer is also a firm service contact, click the box by Filer is a Service Contact.

Administrative Copy (optional) - Enter an email address to receive any eService notification that this Service Contact receives. Only one email address is permitted.

When complete, click Add User at the bottom of the information entry area

ProDoc eFiling 2 Log Out
logged in as sasteve1952@mailinator.com

Home Submit Filing Submit eService My Filings My Cases My eServices Firm Management Resources

Required fields are bold and marked with an asterisk (*).

Filer Information

Filer is an Attorney
 Filer is a Service Contact

First Name*
Middle Name
Last Name*
Bar Number*
Please enter a Bar Number

Email*
Re-type Email*
Administrative Copy
Country* United States ▾
Address Line 1
Address Line 2
City State Texas ▾ Zip
Phone XXX-XXX-XXXX
Fax XXX-XXX-XXXX

Select Filing Delegates

All filers checked, will indicate all filers in your firm will be allowed to file for this Attorney.

- Bradford, Julie (julieb@mailinator.com)
- Law, Jane (jane1952@mailinator.com)
- Newcomer, Mary (mary1952@mailinator.com)
- Schenk, Steve (sasteve1952@mailinator.com)

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NOTE: If you receive the error message “The Email Address is already in use”, the filer's email address is already in use and associated with another firm. The filer must be disassociated with the other firm before they can be added to this firm. See [Changing Firms](#).

Activate Filer Account

As soon as a filer has been added to the firm by the firm eFiling Manager, the EFM will validate the filer email address and provide an eFiling password.

The EFM sends an Activation/Password email to the email address entered by the firm eFiling Manager.

The filer will need to go to their email inbox and locate the Activation/Password email.



New User Activation

Your firm administrator has registered you for use with the eFiling system. Click the link below to activate your account. Please, contact your firm administrator with any questions.

[Click to Activate Account](#)

After activating your account, use the following password: B|Vu}[g9*H

Please, update your password after you log into your account.

For technical assistance, contact your service provider



Online: <https://prodocefile.com>
Phone: (800) 759-5418
Available 24x7 and online with chat

Please do not reply to this email. It was automatically generated.

The email sender is no-reply@tylerhost.cloud or no-reply@efilingmail.tylertech.cloud the subject line is **Activate your account: You have been added to an eFiling firm.**

If you do not see the email in your inbox, check your Spam folder. If you still cannot locate the Activation email, contact efile-manager@thomsonreuters.com.

Highlight and copy the password in the email and save it to your clipboard.

Click on the Activate Account link in the email.

This activates your account and the link takes you to this site-



Click Sign in now

Log in at ProDoc eFiling, using the filer email address and pasting the password from the Activation/Password email.

Read and accept the [User Agreement](#).

Immediately select Change Your Password.

Enter a new more easily remembered password and validate this password by re-entering it where indicated.

Click Change Password when complete.

Adding Attorneys

Enter Attorney Information

A firm eFiling Manager logs into ProDoc eFiling

Select Attorneys under the Firm Management tab

Click Add New Attorney

Enter the attorney's first, middle (not required) and last names

Enter the attorney's Texas State Bar Number. The eFiling system will validate that the bar number is the correct length

Enter Attorney Filer Delegates

The eFiling system allows for any filer within a firm to eFile on behalf of any attorney in the firm. ProDoc allows you to select which filers can eFile on behalf of each attorney. ProDoc will default all firm filers as delegates on a newly created attorney

To disallow a filer to eFile for the attorney selected, uncheck the box next to that filer's name

Click the Add Attorney button

The screenshot shows the ProDoc eFiling 2 web interface. At the top right, there is a 'Log Out' link and the text 'logged in as sasteve1952@mailinator.com'. A navigation bar contains links for Home, Submit Filing, My Filings, Firm Management, Resources, and Help. Below the navigation bar, a note states 'Required fields are bold and marked with an asterisk (*)'. The main form is titled 'Attorney Information' and contains four input fields: 'First Name*', 'Middle Name', 'Last Name*', and 'Bar Number*'. Below this is a section titled 'Select Filing Delegates' with the instruction 'All filers checked, will indicate all filers in your firm will be allowed to file for this Attorney.' A list of filers is shown with checkboxes: Schenk, Steve (sasteve1952@mailinator.com), Law, Jane (jane1952@mailinator.com), and Newcmer, Mary (mary1952@mailinator.com). All checkboxes are checked. At the bottom of the form is an 'Add Attorney' button. The footer contains the text 'This site and all contents Copyright ©2003-2014 Thomson Reuters. All rights reserved.'

Adding Service Contacts

You should only add members of your firm as Service Contacts.

The firm eFiling Manager logs into ProDoc eFiling

Select Service Contacts under the Firm Management tab

Click Add New Service Contact

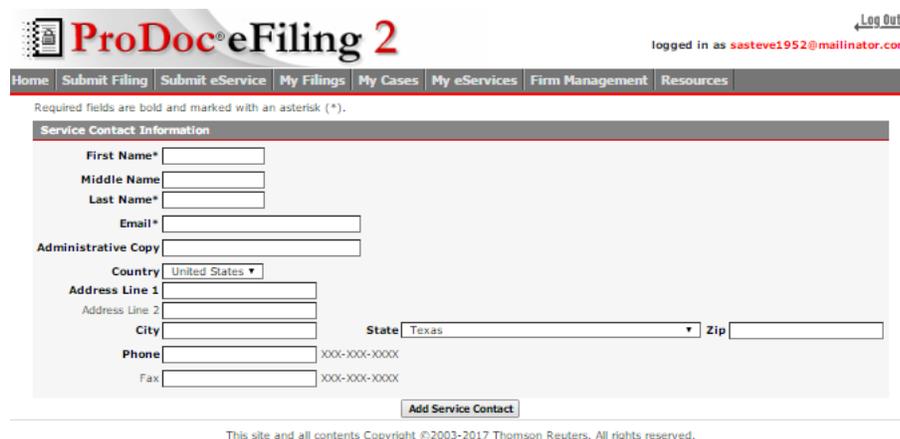
Enter the service contact's first, middle (not required) and last names

Enter service contact's email address.

Administrative Copy (optional) - Enter an email address or multiple email addresses for that email address to receive any eService notification that this Service Contact receives. Refer to [ProDoc eFiling's Notification Options](#) for expanded flexibility regarding notifications.

Other information is optional but if you enter any part of any address filed, all fields will become required

Click the Add Service Contact button



Service Contacts Review and Modifications

You can only detach or modify the service contacts on a case if the service contact is yourself or a service contact in your firm.

Detaching and/or changing service contacts in a case can be accomplished when submitting an eFiling or eService as detailed in our [eFiling Guide](#).

Your firm's eFiling administrator can detach or change the service contacts on a case or cases using Firm Management-Service Contacts.

Select the Attached to case(s) icon next to the Service contact to be detached or changed.



| | First Name | Middle Name | Last Name | Email Address |
|--|---------------------|-------------|-----------|---------------------------------|
| | Pat | | Parick | pat@mailinator.com |
| | Janey | | Prankhorn | steve.schenk@thomsonreuters.com |
| | Steve | | Schenk | steve.schenk@thomsonreuters.com |
| | | | Schenk | steve.schenk@thomsonreuters.com |
| | Attached to case(s) | | Smith | steve.schenk@thomsonreuters.com |

A list of cases where the selected service contact is attached will be presented in a pop-up window.

Select the case or cases from the list where you wish to remove or change the exiting service contact.

Selecting the box at the top of the list will select all cases.

The screenshot shows the ProDoc eFiling 2 interface. At the top right, it says "logged in as sasteve1952@mailinator.com" with a "Log Out" link. The navigation menu includes "Home", "Submit Filing", "Submit eService", "My Filings", "My Cases", "My eServices", "Firm Management" (highlighted), and "Resources". Below the menu is the "Service Contacts" section, which contains a table with the following data:

| | First Name | Middle Name | Last Name | Email Address |
|--------------------------|------------|-------------|-----------|---------------------------------|
| <input type="checkbox"/> | Pat | | Parick | pat@mailinator.com |
| <input type="checkbox"/> | Janey | | Prankhorn | steve.schenk@thomsonreuters.com |
| <input type="checkbox"/> | Steve | | Schenk | steve.schenk@thomsonreuters.com |
| <input type="checkbox"/> | Frances | | Schenk | steve.schenk@thomsonreuters.com |
| <input type="checkbox"/> | John | | Smith | steve.schenk@thomsonreuters.com |

Below the table is a "New Service Contact" button.

The screenshot shows a pop-up window titled "steve.schenk@thomsonreuters.com - Attached to case(s)". It contains a table with the following data:

| <input type="checkbox"/> | Court | Cause Number | Description |
|-------------------------------------|-------------------------------------|----------------|-------------|
| <input type="checkbox"/> | Bexar County - County Clerk - Civil | 2021-99-001 | |
| <input checked="" type="checkbox"/> | Bexar County - County Clerk - Civil | 2021-09-667722 | |
| <input type="checkbox"/> | Hays County - District Clerk | 2021-CV-6655 | |

At the bottom of the window are buttons for "Detach Service Contact", "Replace Service Contact", "Print", and "Close".

To detach the service contact from the selected cases, click on the Detach Service Contact button.

Then confirm this action by clicking okay in the confirmation pop-up window

The screenshot shows the ProDoc eFiling 2 interface with a confirmation dialog box. The dialog box text reads: "Are you sure you want to Detach Service Contact from the below selected case(s)? Bexar County - County Clerk - Civil | 2021-09-667722". There are "OK" and "Cancel" buttons. The background shows the "Service Contacts" table from the previous screenshot.

The screenshot shows the same pop-up window as before, but the "Detach Service Contact" button is now highlighted in blue, indicating it has been clicked.

You cannot reverse this action once you have selected Okay. Please exercise caution when performing this action on a large number of cases.

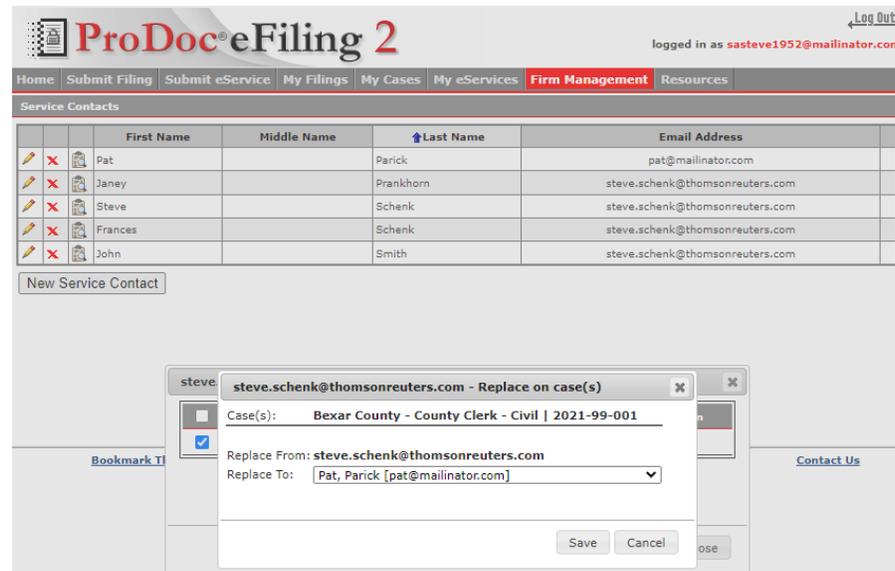
You will receive an email notification from eFileTX confirming the service contact removal for each case.



To change the existing service contact attached to the selected case(s):

Click on the Replace Service Contact button on the case list.

Then select the new service contact to replace the existing service contact from the dropdown in the pop-up.



Then confirm this action by clicking okay in the confirmation pop-up window.

You will receive a confirmation that the action was completed.

You will receive an email notification from eFileTX confirming the service contact removal for each case. However, there is not confirmation notification of the addition of the new service contact. You can confirm that the new service contact was added by selecting the Attached to case(s) icon next to the Service contact.

You cannot replace the existing service contact with a service contact that is already attached to the case(s). You will receive a pop-up letting you know this is an issue. You

can print the list of cases that a service contact is attached to by clicking on Print on the case list.

Changing Firms

The eFiling system does not allow duplicate email addresses in the system. If an email address is already in use, that email address is already registered in the system and is a filer for a firm.

If a filer wishes to retain the email address and join another firm, the filer's current firm's eFiling Manager must remove the filer from the firm.

A firm eFiling Manager logs into ProDoc eFiling

Select the Filers under the Firm Management tab

Click the red **X** next to the filer's name

Confirm the removal of the filer when the pop up dialog box appears

If the filer is also an Attorney and/or Service Contact for this firm, the Firm eFiling Manager should remove them from those lists as well by selecting the appropriate category under the Firm Management tab, clicking the red **X** next to the appropriate name and confirming their removal.

Now the new Firm's eFiling Manager can follow the steps to [add the Filer](#) to their firm.

The filer will need to [reactivate their account](#) as described earlier before being able to log in.

If the filer is the current Firm's only eFiling Manager, he/she cannot be removed from the firm.

If there are other filers in the current firm, one or more of those filers can be added as Firm eFiling Managers and then perform the steps above.

If there are no other filers in the current firm, the filer should remove any firm payment accounts, Attorneys and Service Contacts (including themselves). Then the filer will need to change their email address. This does not have to be an actual email address that you use.

Change your email address by selecting Edit Your Information at the Home page after log in.

Once completed, the new firm's eFiling Manager can add you as a filer and/or attorney and/or Service Contact in the new firm using the steps detailed above.

Adding a Payment Account

Important Information Regarding Payment Accounts

A payment account is required prior to eFiling. A payment account is a name associated with a credit card. Your credit card information is held in a secure third party site. Payment processing for your eFiling transactions is performed at the third party site. Only your payment account names are stored by ProDoc or the EFM.

Many jurisdictions do not accept American Express cards. A list of credit cards accepted by the jurisdiction you are eFiling into is displayed when you are preparing your eFiling submission.

If you primarily use an American Express card, we suggest you also enter a payment account for a VISA or MasterCard credit card.

If at all possible, do not use any payment method that draws directly from your bank account, such as a debit card or Pay Pal for eFiling. When you eFile the EFM preauthorizes your card for the estimated fees for your eFiling transaction. If the jurisdiction returns your eFiling for corrections your card is not charged. However, if you have used a debit card, the preauthorization creates Pending Transactions in your bank account. Depending on your bank's policy these transactions may not be released for several days and you will not be able to access these funds until they are released. If this occurs we will work with you to get these funds released as quickly as possible however, it is best to avoid the situation.

Adding a Payment Account

The firm eFiling Manager logs into ProDoc eFiling.

Select Payment Methods under the Firm Management tab.

Click Add New Payment Account.

Enter a name to be associated with this credit card.

Click Add Credit Card.

You will be redirected to the third party's site.

Enter the credit card information.

Click Continue.

Review the terms and then click Save Information.

You will receive a message that the credit card was added.

Click Continue.

The card will now appear as a Payment Method for the firm.

Notification Options

Overview

The State's EFM sends notification emails to the email address of the filer. In the case of an eFiling submission, the documents being filed can also be emailed to additional recipients on a submission by submission basis using the Courtesy Copies or Preliminary Copies feature (refer to page in the ProDoc eFiling Guide).

The State's EFM also sends a notification email to the email address of the Service Contact when that Service Contact is eServed. The documents being served can also be emailed to a single additional recipient as indicated in the Service Contact's [Administrative Copy](#).

ProDoc's Notifications Options allows you to send notifications generated by ProDoc eFiling to any email you add. We will send notifications when an eFiling is submitted and a notification when the final disposition of the eFiling is received, i.e. accepted, cancelled or returned/rejected. We will also send a notification when you as a Service Contact are eServed.

Entering Email Addresses to Receive Notifications

Log in and click on Notification Options on the screen's left panel.

Enter the Name and Email address for anyone you would like to receive ProDoc Notifications.

Click on Save New Recipient.

Continue adding recipients as needed.

ProDoc® eFiling 2 Log Out
logged in as **sasteve1952@mailinator.com**

Home Submit Filing Submit eService My Filings Firm Management Resources

Filer Notification Distribution List

ProDoc notifications concerning eFilings and eServices will be sent to the email addresses listed here. If you would like notifications to go to the person filing, please include their email in this list.

| | Recipient Name | Email |
|---|----------------------|----------------------|
| Edit Delete | john Doe | johnd@mailinator.com |
| Save New Recipient | <input type="text"/> | <input type="text"/> |

[Import Firm Contacts](#)

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You can Edit or Delete your Notification Options at this screen at any time.

To automatically add Service Contacts from your firm,

Click on Import Firm Contacts.

Click on the box beside the Service Contact(s) to be added.

Click on Save.

The screenshot shows the ProDoc eFiling 2 web interface. At the top, the logo "ProDoc eFiling 2" is displayed, along with a "Log Out" link and the text "logged in as sasteve1952@mailinator.com". A navigation bar includes links for Home, Submit Filing, Submit eService, My Filings, Firm Management, and Resources.

The main content area is titled "Filer Notification Distribution List". Below the title, a text block explains that ProDoc notifications concerning eFilings and eServices will be sent to the email addresses listed here. Below this text is a table with the following data:

| | Recipient Name | Email |
|---|----------------------|----------------------|
| Edit Delete | john Doe | johnd@mailinator.com |
| Save New Recipient | <input type="text"/> | <input type="text"/> |

Below the table is an "Import Firm Contacts" button. A copyright notice reads: "This site and all contents Copyright ©2003-2014 Thomson Reuters. All rights reserved."

An "Email Notifications" dialog box is open, showing a table with the following data:

| Select | Name | Email |
|--------------------------|--------------|----------------------------|
| <input type="checkbox"/> | Jane Law | jane1952@mailinator.com |
| <input type="checkbox"/> | Mary Newcmer | mary1952@mailinator.com |
| <input type="checkbox"/> | Steve Schenk | sasteve1952@mailinator.com |

At the bottom right of the dialog box are "Save" and "Cancel" buttons.