

## TrueFiling Bundles – Legacy and Streamlined

### Legacy Bundle

In a Legacy bundle, a filing is created for a case using the Filing Wizard. Within the wizard, the filing is added to an existing bundle, or a new bundle is created. Each filing has a Primary Document uploaded, and attachments can be appended as additional pages to this document as needed.

Each filing in a bundle has its own filing and servicing specifications, and a separate Proof of Service is generated for each filing.

### Streamlined Bundle

In a Streamlined bundle, the bundle is created first, and filings are added to it. Bundle properties - filing attorney, filing option, and client matter number – are specified, as well as service recipients. These properties and service recipients are applied to each filing in the bundle.

A filing will have a lead document. It may also have one or more connected documents, which are separate filings that are associated to the lead document. A file is uploaded for each connected document. Corresponding fees may be applied.

For courts transitioning from Legacy to Streamlined bundles, if e-servicing is specified, a separate Proof of Service is created for each filing in the bundle. These Proofs of Service are immediately delivered to the Clerk after the bundle is submitted to the Court.

For courts that have always used Streamlined bundles, if e-servicing is specified, a single, combined Proof of Service is generated for all filings in the bundle and is immediately delivered to the Clerk after the bundle is submitted to the Court.

### Case Detail Page

In a Streamlined bundle, the Case Detail page lists the case bundles (submitted and un-submitted), as well as the firm contacts, self-represented contacts, and opposing counsel associated with the case.

**Case Details**

**Party L vs. Party M**  
 2015-011345-CZ  
 MI ImageSoft 100th Circuit Court

7 Add to Favorites  
 8 View Register of Actions  
 Jury Demand

1

**Information:** The following bundles have not been submitted to the court yet.

|                         |                            |                                          |
|-------------------------|----------------------------|------------------------------------------|
| 2015-011345-CZ-20150622 | 2 <b>Amy Ryan (P12345)</b> | Not Submitted                            |
| 3 Motion                | Motion, Pre-Judgement      | In Progress \$300.00 Connected Documents |

**Previous Bundles**

|                            |                            |               |
|----------------------------|----------------------------|---------------|
| 2015-011345-CZ-20150702-24 | 4 <b>Amy Ryan (P12345)</b> |               |
| 5 Motion-070215            | Motion, Post-Judgement     | Filed \$25.00 |

Page 1 of 1 | First | Last

**Case Contacts** 6

|                    |          |          |                        |                  |
|--------------------|----------|----------|------------------------|------------------|
| Ryan, Addy         | Contact  | Ryan Law | aryan@imgsoft.com      | Remove From Case |
| Ryan, Amy (P12345) | Attorney | Ryan Law | aryan@imagesoftinc.com | Remove From Case |

**Firm Contacts**  
 Add Contact Add New Contact Add Attorney Add New Attorney

**Opposing Counsel**  
 Add Opposing Counsel

**Self-Represented Contacts**  
 Add Self-Represented Filer Add New Self-Represented Filer

- 1 Create a new bundle.
- 2 Name of the UNSUBMITTED bundle. Click to launch the Bundle Detail page.
- 3 Name of the filing in the bundle.
- 4 Name of the SUBMITTED bundle. Click to launch the Bundle Detail page.
- 5 Name of the filing in the bundle. Click to launch the Filing History dialog, where the file stamped copy and filing receipt can be downloaded.
- 6 Case Contacts section – lists all contacts for the case and enables additional contacts to be added, including opposing counsel and self-represented filers.
- 7 Add / Remove from Favorites option for the case.
- 8 Court specified and configured options.

## Bundle Detail Page

If the bundle hasn't been submitted, the Bundle Detail page displays as:

**Information:** This bundle has *not* yet been submitted to the Court. Please confirm that you have uploaded all filings you want to include in this bundle, verified the service recipients and reviewed the payment information prior to clicking Submit.

**Bundle Details**

**2015-011345-CZ-20150622**

**Case Title** Party L vs. Party M

**Case Number** 2015-011345-CZ

**Court** MI ImageSoft 100th Circuit Court

**Filing Attorney** Amy Ryan (P12345)

**Client Matter Number** 987

**Created By** aryan@imagesoftinc.com

|                 |                 |
|-----------------|-----------------|
| Filing Fees     | \$300.00        |
| Processing Fees | \$3.00          |
| <b>Total</b>    | <b>\$303.00</b> |

Payment Account: Mastercard 1 - [5111\*\*11]

Sue Cardholder: 7/2017

or

**Filings**

|                                                    |                                                               |                                                                                                                                      |                                       |
|----------------------------------------------------|---------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|
| <input type="text" value="Motion Post-Judgement"/> | <input type="text" value="Motion, Post-Judgement - \$25.00"/> | <input type="text" value="Documents\MOTION.pdf"/>                                                                                    | <input type="button" value="Upload"/> |
| <p><b>Document Title</b></p> <p>Motion</p>         | <p><b>Filing Type</b></p> <p>Motion, Pre-Judgement</p>        | <p><b>Uploaded File</b></p> <p>View File [85 kb]</p>                                                                                 | <p><b>Fees</b></p> <p>\$303.00</p>    |
|                                                    |                                                               | <p><b>Actions</b></p> <p style="text-align: center;"> <input type="button" value="Delete"/> <input type="button" value="Edit"/> </p> |                                       |

|                                                |                                            |                                                                                                                |                                     |
|------------------------------------------------|--------------------------------------------|----------------------------------------------------------------------------------------------------------------|-------------------------------------|
| <input type="text" value="Motion-Supporting"/> | <input type="text" value="Miscellaneous"/> | <input type="text" value="View File [85 kb]"/>                                                                 | <input type="text" value="\$0.00"/> |
|                                                |                                            | <p style="text-align: center;"> <input type="button" value="Delete"/> <input type="button" value="Edit"/> </p> |                                     |

Add Connected Documents

- 1 Specify the Document Title and Filing Type.
- 2 Select the filing document and upload it.
- 3 Names of the filings in the bundle.
- 4 Fees associated with the filing. Click the fee amount to launch a fee disclosure dialog.
- 5 Actions available for the filing – Delete or Edit.
- 6 Connected Document associated with filing.
- 7 Delete the bundle.
- 8 Edit the Service Recipients and Bundle Properties. Click to launch the Bundle Properties dialog.

If the bundle has been submitted, the Bundle Detail page displays as:

**Bundle Details**

**2015-011345-CZ-20150702-24**

**Case Title** Party L vs. Party M

**Case Number** 2015-011345-CZ

**Court** MI ImageSoft 100th Circuit Court

**Filing Attorney** Amy Ryan (P12345)

**Client Matter Number** 987

**Created By** aryan@imagesoftinc.com

|                 |                 |
|-----------------|-----------------|
| Filing Fees     | \$300.00        |
| Processing Fees | \$3.00          |
| <b>Total</b>    | <b>\$303.00</b> |

Sue Cardholder: 5111\*\*11 (7/2017)

**Filings**

|                                            |                                                    |                                                                                                                |                                       |
|--------------------------------------------|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------|---------------------------------------|
| <input type="text" value="Motion-070215"/> | <input type="text" value="Motion, Pre-Judgement"/> | <input type="text" value="View File [82 kb]"/>                                                                 | <input type="text" value="\$303.00"/> |
|                                            |                                                    | <p style="text-align: center;"> <input type="button" value="Delete"/> <input type="button" value="Edit"/> </p> |                                       |

- 1 Delete the bundle, available only if the filings in the bundle have been filed or rejected.
- 2 Click the Filed Proof of Service link to download the bundle's filed Proof of Service document.
- 3 View the bundle properties and service recipients. Click to launch the Bundle Properties dialog, which is view only.
- 4 List of filings in the bundle, including any connected documents.

## Bundle Properties Dialog

When you click the **Create New Bundle** button on the Case Detail page, the Bundle Properties dialog is displayed. Here, you'll specify the bundle properties, which are applied to all filings in the bundle. In addition, you'll specify the service recipients for all the bundle filings.

For existing bundles that have been submitted to the Court, you can click the **View Service Recipients / Bundle Properties** link on the Bundle Detail page to view the dialog in read-only mode.

For existing bundles that have NOT been submitted, click the **Edit Service Recipients / Bundle Properties** link to launch the dialog and make any changes.

- 1 Specify the bundle properties. Properties are applied to all filings in the bundle.
- 2 Service Recipients section – case contacts and ad-hoc recipients selected for service.
- 3 List of case contacts specified for servicing.
- 4 Checkbox selected to include the recipient for servicing.
- 5 Select servicing method.
- 6 Ad-hoc service recipients added for this bundle.
- 7 Add ad-hoc service recipient link.

## Filing History Dialog

To access the Filing History dialog, click the Filing Name from the Case Detail, Bundle Detail, or History page.

| Activity Time       | Status      | Comments                                                                                                  |
|---------------------|-------------|-----------------------------------------------------------------------------------------------------------|
| 07/02/2015 13:03:13 | Filed       | OBWORKFLOW: Filing officially filed by the Court.                                                         |
| 07/02/2015 13:00:07 | Paid        | INFO: Payment Accepted. Order Id: 63571453206398621914, Tracking Id: e69db3b2-4aa1-4be0-b8aa-920931d3245d |
| 07/02/2015 12:58:15 | Accepted    | OBWORKFLOW: Your submitted filing has been tentatively accepted, pending payment.                         |
| 07/02/2015 12:44:45 | In Progress | Received filing 6c4a518d-f5eb-45cc-a6a8-5083588ddba5 at 12:44:23 PM on 7/2/2015.                          |

- 1 Click the paperclip icon beside the **Filed** status timestamp to download the official file stamped copy.
- 2 Click the paperclip icon beside the **Paid** status timestamp to download the payment receipt for the filing.