

This is a presentation of the new screens and functionality which will be available on January 19<sup>th</sup> of this year in the - NYS Courts Efiling system < NYSCEF >

This presentation is being given to familiarize the attorney user (E-Filer) with the new look and functionality of the NYSC EF system.

If you have been using the current system, we are sure that you will have no problem using the new one.

If you have not yet had an opportunity to use NYSCEF, this demonstration will show how simple it is, to EFILE and SERVE documents through NYSCEF and we encourage you to apply for a password and join the thousands of other filers who are enjoying all the benefits of E-Filing.

The Screen you are looking at is the initial welcome screen to the New NYSCEF.

To get to this screen on January 19<sup>th</sup> you will simply log in to [www.NYCourts.gov/efile](http://www.NYCourts.gov/efile)

<> on this screen you will see selections for the Live and Training system for both Supreme court /ct of claims — and for the Surrogate and Scar system.

At this time the only update to screens is for the Supreme & Ct of claims, the current screens and processes used for Surrogate and SCAR filings are still in place.

On this entrance screen

<> **Select** either the Live or Training system of the court you wish to file in.

This will bring you to a main screen for those courts.

As you can see on this main screen there are many useful links which this presentation will not review in detail but which you can click on and review on your own.

To user the NYSCEF system, you will need a user ID and password

To obtain one click on “Create an Account and follow the links to the online application.

<> Note, that although this application is filled out online, as a final step, this application must be printed / Signed and submitted as instructed on the form which will be printed at the end of the process. Passwords are usually issued within 24 -48 hours however

There is a link that will allow you to obtain a temporary password in the event that you need one more expeditiously.

For help with obtaining a user ID and password , or for any general Efiling assistance you can contact the NYSCourts EF Resource Center at 646-386-3033

or email that office at [Efile@nycourts.gov](mailto:Efile@nycourts.gov)

For the purpose of this demonstration we will logging in as an attorney/filing user, and commencing a case in the Supreme court.

In addition to having a user ID and password, you must have your documents in PDF format Portable document format ( adobe or similar ) once created , you should save your PDF documents in a folder or somewhere on your computer or server where you can retrieve them when needed. You may name your PDF file anything you like

NYSCEF has no restrictions on the file name for any document . However, the file must not be encrypted and must be in PDF format.

In the example you will see here - we have created a folder for our CASE FILE and have given it the name of the specific client.

—> once you have your main and any supporting documents in PDF format, and have saved them in a place that you can retrieve them from, , you are ready to begin.

To begin filing ,

<> **Enter your user ID and password**

YOU ARE NOW LOGGED IN AS A NYSCEF USER

There are VARIOUS OPTION ON THIS SCREEN -

FOR NOW, WE WILL BE looking at - STARTING A NEW CASE OR PROCEEDING

notice that there is an option on the left panel, bottom panel, as well as the option in the middle of the page in the E-File area to click on.

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**SELECT START A NEW CASE**

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A Filing Help Button on top right of most screens is available for on screen help as you move forward.

**NEXT >SELECT A COURT FROM THE DROP DOWN AND CLICK the NEXT button**

Notice AT THE TOP OF THIS SCREEN IS A PROGRESS BAR... IT WILL TELL YOU WHERE YOU ARE at any point in the commencement PROCESS and guide you through.

>It is I M P O R T A N T to Note here >>that the NYSCEF System will monitor and display your progress throughout your filing however the current version of this program will not allow you to pause or suspend a filing and return at a later time. Therefore, you must either complete the filing to the end of the process OR cancel a filing and begin again.

---On this screen you should also note THE CASE SUMMARY AT THE TOP OF THE PAGE

THIS DISPLAYs your selections from prior screens ON THIS FILING AS YOU MOVE through them.

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In addition, A PREVIOUS BUTTON in the upper Right hand corner, as well as AT THE BOTTOM OF THE PAGE is available.

These buttons WILL ALLOW YOU TO GO BACK TO THE PREVIOUS PAGE at any time in the filing process.

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**To proceed, SELECT A CASE TYPE AND CLICK NEXT**

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**ADD PARTIES >**

-----AGAIN THE CASE SUMMARY IS UPDATED, AND THE PROGRESS BAR HAS MOVED TO “ PARTIES “ .

You are now ready to enter parties .

THIS online SCREEN REPLACES ANY NEED FOR a PAPER APPLICATION FOR INDEX NUMBER FORM which is typically filed with commencement papers.

CARE SHOULD BE TAKEN IN MAKING SURE EVERY PLAINTIFF / PETITIONER, OR DEFENDANT/RESPONDENT IS CORRECTLY ENTERED.

IF the plaintiff or defendant is an Entity, , ENTER THAT IN THE BUSINESS / ORGANIZATION NAME.

ONLY ONE PARTY OR ENTITY is PERMITTED on each line.

The button to the Right of the entity field which reads “ **Other Name/STATUS** is for when

A caption may include an alternate name for a party such as an alias ("aka Billy the Kid") or a trade name ("dba Carwreckers Towing") or specify a legal status ("as Executor of the Estate of John Smith").

After you enter all plaintiffs and defendants, and Click NEXT YOU WILL HAVE AN OPPORTUNITY TO REVIEW AND CORRECT ANYTHING ON THE Verify caption page

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## **VERIFY Caption page :**

>>> IT IS VERY IMPORTANT THAT THE CAPTION MATCHES THE PLEADINGS YOU ARE SUBMITTING.

Expanded and New FUNCTIONALITY ON THIS PAGE ALLOWS YOU TO EDIT , ADD , OR REMOVE AS NEEDED.

YOU CAN EVER RE-ARRANGE PARTIES IF NEEDED BY CLICKING ON THE UP/DOWN BUTTONS.

>>> ONCE you have confirmed that THE CAPTION MATCHES, **CLICK “NEXT “ to proceed.**

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# ADD Documents PAGE

as the Progress bar now indicates, YOU ARE ON THE “DOCUMENTS“ PAGE.

notice > YOU CAN NOW have an option to DISPLAY FULL OR SHORT CAPTION IN THE CASE SUMMARY AREA.

--- >> On this page YOU WILL Attach AND ANNOTATE YOUR DOCUMENTS for transmittal

THERE ARE TWO CLASSES OF DOCUMENTS THAT YOU MAY NEED TO FILE

YOU WILL ALWAYS NEED TO FILE A Main, or in this case a COMMENCEMENT DOCUMENT, AND MAY NEED TO FILE another, or ACCOMPANYING DOCUMENT .

The commencement document is the first document or Main document. There can be only one.

<>There can be as many accompanying documents as you need to , in support of your commencement document.

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<>SELECT THE title of your COMMENCEMENT DOCUMENT FROM THE DROP-DOWN menu. In this case we are filing a Summons and Complaint. Note that a summons and complaint should be filed as ONE pdf.

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<> UNDER **FILE NAME**, Enter either THE PATH TO YOUR DOCUMENT by typing it in, OR SELECT BROWSE.

Which OPENS TO A NEW WINDOW WHERE YOU WILL NEED TO LOCATE YOUR SAVED PDF Document. DOUBLE CLICK OR CLICK OPEN to link to that document.

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<> To the right of the FILE NAME THERE ARE TWO YES NO BOXES, Secure and Contains SSN.

**Answer "Yes" to Secure** if the document you intend to file contains: individually identifiable health information; a social security number (where inclusion of such a number is permitted by General Business Law § 399-dd(6)); a credit card or bank account number; an individual's date of birth or home address; a minor child's name; or trade secrets. The document will then be marked "Secure" in NYSCEF. Access to Secure documents via NYSCEF is restricted only to consenting parties, counsel, the County Clerk, and the court. However, the public may view a Secure document via public access computers located inside the courthouse where the matter is pending (unless the document is sealed pursuant to Part 216 of the Uniform Rules for the Trial Courts).

**Answer Yes to “DOCUMENT CONTAINS SSN”** If your Document contains a SSN. Note that General Business Law § 399-dd(6) prohibits the filing of any document available for public inspection that contains the social security number of any other person, unless: that other

person is a dependent child or has consented to the filing; or the social security number is required by court rule. By answering "Yes," you are notifying the court and the County Clerk that the document you intend to file contains an individual's social security number.

### **DOCUMENT DESCRIPTION FIELD :**

Not all documents require a description beyond the "Document Type" selected from the drop-down menu. However, you may use up to 255 characters in this space to provide any description you feel is necessary or helpful for present or future reference. For example, you might find it useful to describe an "Affidavit" as "Affidavit of John Smith in support of plaintiff's summary judgment motion."

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### **Special instructions**

Use this space to direct the document to a specific chambers, office, or clerk. For example, when filing a "Stipulation Adjourning Motion" with respect to a motion that is returnable in a particular Part, you might enter the Part number or the Justice's name into this field. **ADDITIONAL INFORMATION ON WHAT TO ENTER HERE WILL BE PROVIDED IN THE WHATS THIS AREA OF THE SCREEN.**

<<<<>>>>

DOCUMENTS 2 AND beyond, ARE FOR ACCOMPANYING DOCUMENTS:

use the same process to attach documents and annotate, with the following two exceptions :

1> **where a document is an exhibit**, you will be required to enter the exhibit number in the appropriate filed. Simply a letter or number is needed

2> In the area to the right, that reads, "**Attach to Commencement Document\***

If you check this box, this document will be treated as a sub-document to the commencement document.

In this example, the summons and complaint will be designated as Document # 1 and the accompanying document (exhibit) will be designated as Document # 1-1.

If you do not check this box, the exhibit will be designated as Document # 2.

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>>>>**CLICK NEXT** which will bring you to the payment page

# PAYMENT PAGE :

>Again, the PROGRESS BAR at the top SHOWS YOU what page you are on.  
You ARE now ON THE PAYMENT PAGE,

YOU MAY PAY FOR YOUR FILINGS online BY MASTERCARD / VISA  
OR SEE THE OTHER OPTIONS TO PAY AT COURTHOUSE or NO FEE

PREVIOUSLY PAID IS USED WHEN RE-SUBMITTING CORRECTED DOCUMENTS  
WHICH WERE PREVIOUSLY PAID, OR WHEN FILING DOCUMENTS THAT WERE  
PREVIOUSLY FILED IN PAPER WHERE AUTHORIZED BY COURT RULES.

THE COMMENT AREA is WHERE YOU CAN ENTER ANY INFORMATION YOU WANT  
TO CONVEY to the County Clerk ABOUT THE FILING OR PAYMENT OF.

>>**CLICK NEXT**

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–You are now on the **review screen.,**

on this screen you have a final opportunity to review each area of information that you entered  
and make any needed changes before “ sending “ your documents and payment off to the court.

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After you make any changes on this screen and / or you are satisfied that your data as it is  
displayed is correct,

**select FILE / to SEND Documents to the court.**

The documents and payment information will be sent for processing .

You will receive email confirmation in addition to the confirmation that you will see on the  
screen.

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## THANK YOU

The Success / thank you page that you see at the end of your filing may be printed.

In addition there are links to the Receipt, notice of filing where required, and to the  
Confirmation Notice which - by **court rule**, is required to be firmly affixed to any working  
copies that are requested by a court.

You can also view the case information from this screen by clicking on view case details.

Here you can view Docket Detail, Document Lists, and Document detail.

This presentation will not go into those functions of the New NYSCEF filing screens but we will soon be posting others to review them as well.

This presentation was created to help you become more familiar with the new look of NYSCEF

We hope it has been informative.

If you have any questions about any of the material that has been presented, please email [Efile@nycourts.gov](mailto:Efile@nycourts.gov) Or call the EF Resource Center at 646-386-3033

In addition The NYSCEF Resource Center located at 60 Centre Street in NY county offers Training every Wednesday and Friday at which attendees can receive 2 FREE CLE Credits. Sessions are also being provided in Westchester on Tuesdays and Thursdays.

Seating is limited ,

For information contact the resource Center. email [Efile@nycourts.gov](mailto:Efile@nycourts.gov) Or call the EF Resource Center at 646 - 386- 3033

Thank you for your attention, and your continued support of the NYS Courts Efiling system.  
NYSCEF