

How to Place an eFiling Order for Initiating Cases (California)

Send us the documents that open a new case, and we will eFile them with the court. You can also ask us to serve the documents once they are filed, in the same order.

Start here

LOG IN TO THE PORTAL →

Or go to directlegal.legalconnect.com and log in with your email address and password. Use a current version of Chrome, Edge, Firefox or Safari. New to the portal? See our **Creating a New Account** guide.

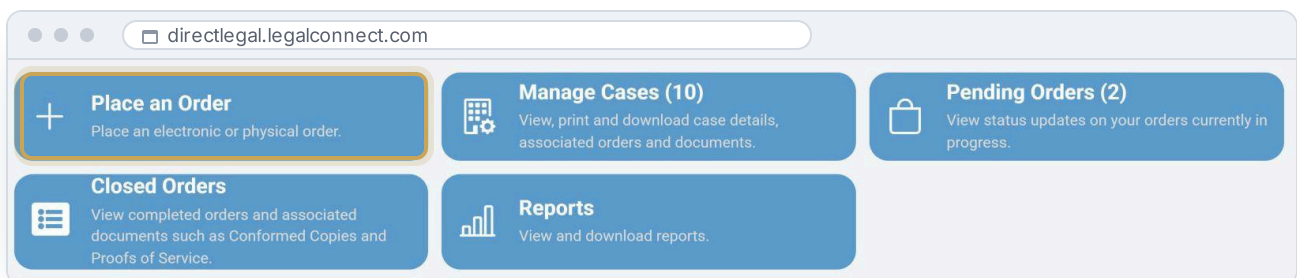
What you will need

- ✓ Your documents as PDF files, one file per document
- ✓ The county and court where you are filing
- ✓ The case category, case type and amount in dispute
- ✓ The names of the parties and attorneys (a self-represented party also needs an address, phone number and email)
- ✓ Your billing code or client matter number, if your firm uses one
- ✓ To have the documents served: who to serve and where



Click Place an Order

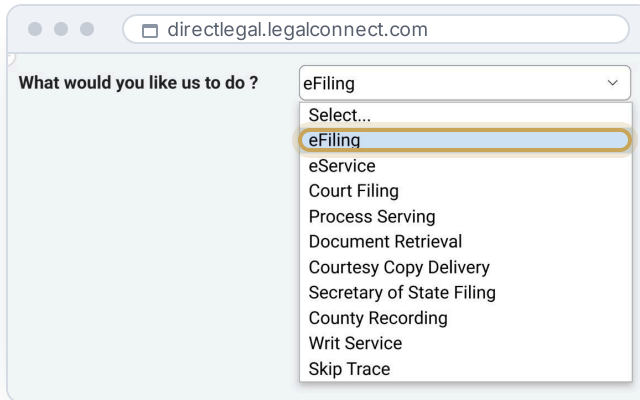
Log in to your account. On your dashboard, click **Place an Order**.



2

Choose eFiling

In **What would you like us to do?**, select **eFiling**.



A screenshot of a web browser window showing the 'What would you like us to do?' dropdown menu. The menu is open, showing a list of options: 'Select...', 'eFiling', 'eService', 'Court Filing', 'Process Serving', 'Document Retrieval', 'Courtesy Copy Delivery', 'Secretary of State Filing', 'County Recording', 'Writ Service', and 'Skip Trace'. The 'eFiling' option is highlighted with a blue border.

3

Select the county and Case Initiation

If the form shows **Select State**, choose **California**. In **Select County**, choose the county where the case will be filed. Under **Select Filing Type**, choose **Case Initiation**.

Some counties, such as Orange, also show **Select Case Category**. Choose **Civil, Mental Health, Probate, Small Claims** or **Family**.

Under **Serve after filing**, choose **Yes** if you want us to serve the documents once they are filed. Click **Next**.



A screenshot of the 'Order Info' tab in the Direct Legal Support portal. The form shows the following fields and options:

- Select State:** California
- Select County:** Orange (1)
- Select Filing Type:** Subsequent Filing, Case Initiation (2)
- Select Case Category:** Civil, Mental Health, Probate, Small Claims (3), Family
- Serve after filing:** Yes, No (4)

At the bottom of the form, there are buttons for « Previous, Next, and Save As Draft.

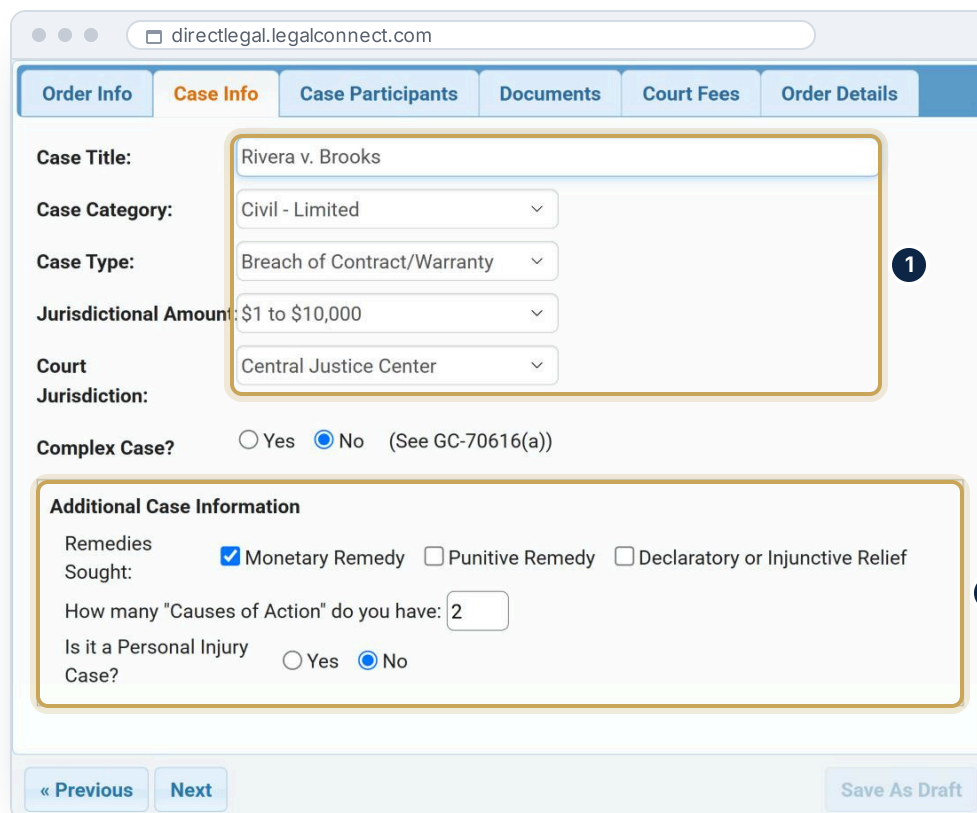
Serving after filing: If you choose **Yes**, enter how many people or businesses we should serve, then each one's name, capacity and agent for service, if any. You add the service addresses later, on the **Serve Info** tab (step 9A).

4

Enter the case information

On the **Case Info** tab, enter a **Case Title**. Choose the **Case Category**, **Case Type**, **Jurisdictional Amount** and **Court Jurisdiction**, and answer **Complex Case?** (1)

Under **Additional Case Information**, check the **Remedies Sought**, enter how many **Causes of Action** you have, and say whether this is a personal injury case (2). Click **Next**.



The screenshot shows a web browser window with the URL `directlegal.legalconnect.com`. The page has a navigation bar with tabs: **Order Info**, **Case Info** (selected), **Case Participants**, **Documents**, **Court Fees**, and **Order Details**.

The **Case Info** section contains the following fields:

- Case Title:** A text input field containing "Rivera v. Brooks".
- Case Category:** A dropdown menu with "Civil - Limited" selected.
- Case Type:** A dropdown menu with "Breach of Contract/Warranty" selected.
- Jurisdictional Amount:** A dropdown menu with "\$1 to \$10,000" selected.
- Court Jurisdiction:** A dropdown menu with "Central Justice Center" selected.
- Complex Case?** Radio buttons for "Yes" and "No" (selected), with a note "(See GC-70616(a))".

A yellow box highlights the dropdown menus for Case Category, Case Type, Jurisdictional Amount, and Court Jurisdiction, with a circled "1" next to it.

The **Additional Case Information** section contains the following fields:

- Remedies Sought:** Checkboxes for "Monetary Remedy" (checked), "Punitive Remedy", and "Declaratory or Injunctive Relief".
- How many "Causes of Action" do you have:** A text input field containing "2".
- Is it a Personal Injury Case?** Radio buttons for "Yes" and "No" (selected).

A yellow box highlights the Remedies Sought, Causes of Action, and Personal Injury Case fields, with a circled "2" next to it.

At the bottom of the form, there are three buttons: **« Previous**, **Next**, and **Save As Draft**.

4A For an unlawful detainer: add the premises

If the case is an unlawful detainer, **Additional Case Information** also asks for the **Premises Address**, one line at a time from the street address down to the ZIP code, and the **Daily Rental Amount**.

Additional Case Information

Remedies Sought: ☒ Monetary Remedy ☐ Punitive Remedy ☐ Declaratory or Injunctive Relief

Premises Address:

Unit #:

City:

State:

Zip:

How many "Causes of Action" do you have:

Daily Rental Amount:

5 Add the case participants

On the **Case Participants** tab, click **Add Party** or **Add Attorney** and enter each one's information. Check **Lead Client** next to your client. Click **Next** when everyone is listed.

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Order Info Case Info **Case Participants** Documents Court Fees Order Details

Add Party Add Attorney

Lead Client	Name	Role	Email	Action
☐	Rivera, Ana	Plaintiff		
☐	Brooks, Daniel	Defendant		

Show 50 entries | 2 participants in this case.
 First Previous 1 Next Last

« Previous Next Save As Draft

Attorney or self-represented party: The court needs at least one attorney or one self-represented party on the case. If a party has no attorney, mark the party as self-represented and enter their address, phone number and email address.



Billing Code

Lead Client: Plaintiff: Rivera, Ana

Billing Code: RLG-2041

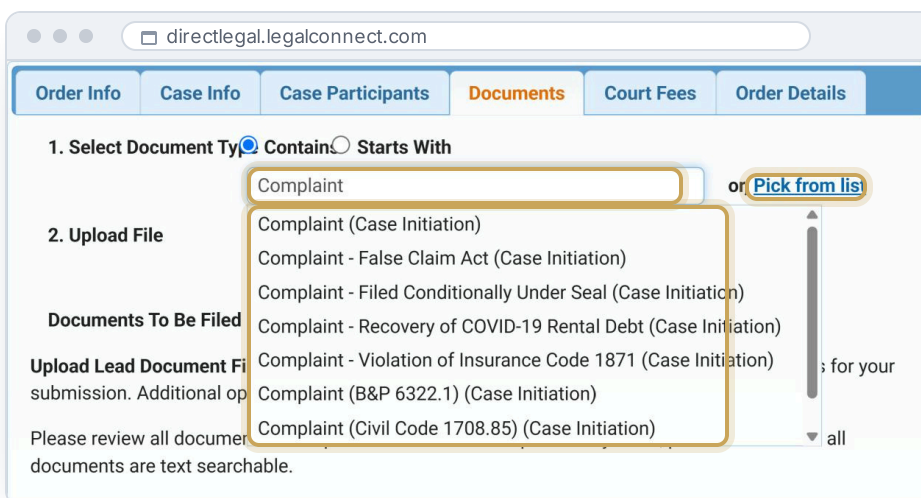
Save Cancel

Billing code: When you click **Next**, you may be asked for a **Billing Code**, depending on how your account is set up. Choose the **Lead Client**, enter your firm's internal billing or client matter number and click **Save**.

6

Choose the document type

On the **Documents** tab, start typing in **Select Document Type** and choose your document from the list. Choose **Contains** or **Starts With** to change how the list is searched, or click **Pick from list** to browse.



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Order Info Case Info Case Participants **Documents** Court Fees Order Details

1. Select Document Type ☒ Contains ☐ Starts With

Complaint or **Pick from list**

2. Upload File

Documents To Be Filed

Complaint (Case Initiation)

Complaint - False Claim Act (Case Initiation)

Complaint - Filed Conditionally Under Seal (Case Initiation)

Complaint - Recovery of COVID-19 Rental Debt (Case Initiation)

Complaint - Violation of Insurance Code 1871 (Case Initiation)

Complaint (B&P 6322.1) (Case Initiation)

Complaint (Civil Code 1708.85) (Case Initiation)

Upload Lead Document First

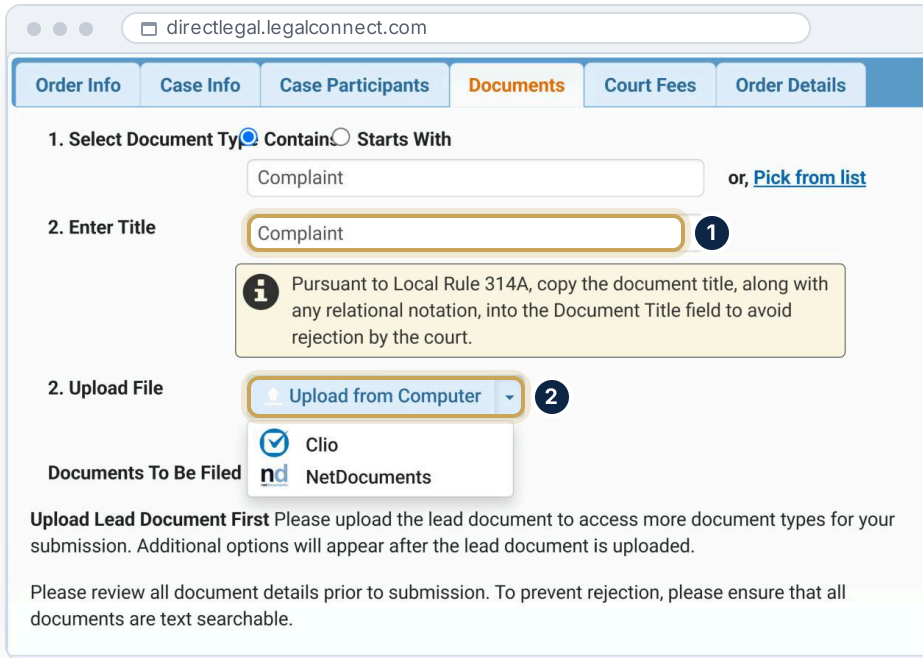
Please review all documents. Additional documents are text searchable.

Upload the lead document first: Choose and upload the main document in the filing, such as the complaint, before the others. More document types appear in the list once the lead document is uploaded.

7

Enter the title and upload the file

Check the **Title**. Some courts, such as Orange County, ask you to copy the document's exact title into this field (1). Then click **Upload from Computer** and double-click the file to upload it (2).

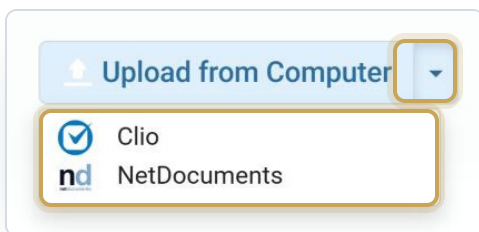


The screenshot shows the 'Documents' tab in the client portal. The '1. Select Document Type' section has 'Complaint' selected under 'Contain' and 'Starts With'. The '2. Enter Title' section has 'Complaint' entered in the title field, with a circled '1' next to it. A yellow information box below the title field states: 'Pursuant to Local Rule 314A, copy the document title, along with any relational notation, into the Document Title field to avoid rejection by the court.' The '2. Upload File' section has 'Upload from Computer' selected in the dropdown menu, with a circled '2' next to it. Below this, 'Clio' and 'NetDocuments' are listed as options for 'Documents To Be Filed'. At the bottom, there is a note: 'Upload Lead Document First Please upload the lead document to access more document types for your submission. Additional options will appear after the lead document is uploaded. Please review all document details prior to submission. To prevent rejection, please ensure that all documents are text searchable.'

One document per file: Upload each document separately, such as the Summons, Complaint, Civil Case Cover Sheet and Proof of Service. Repeat steps 6 and 7 until every document is attached.

7A

Or upload from Clio or NetDocuments



The close-up shows the 'Upload from Computer' dropdown menu. The dropdown is open, showing 'Clio' and 'NetDocuments' as options. 'Clio' has a checkmark icon next to it, and 'NetDocuments' has a 'nd' icon next to it.

If your firm keeps its files in **Clio** or **NetDocuments**, you can attach the document from there instead of from your computer. Click the arrow next to **Upload from Computer** and choose **Clio** or **NetDocuments**. Sign in if asked, then pick the file.

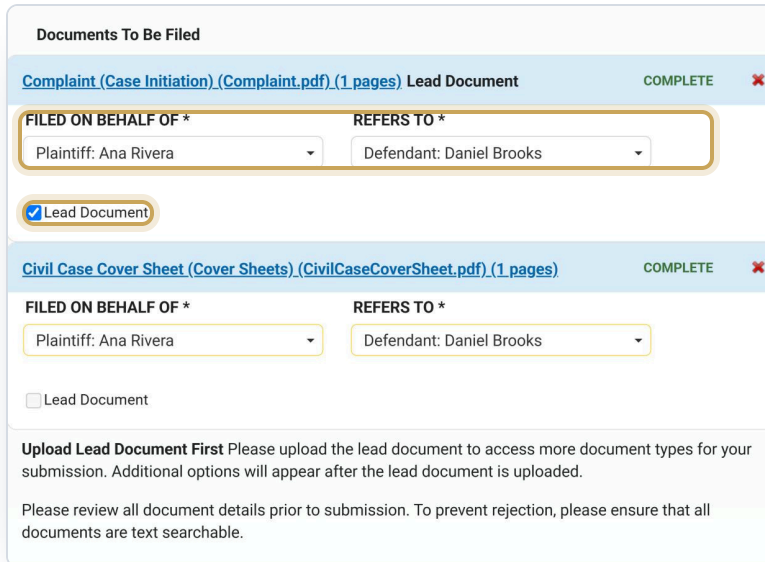
For the full steps, see [Using Clio with Direct Legal Support](#) or [Using NetDocuments with Direct Legal Support](#).

8

Fill in the document details

Your files are listed under **Documents To Be Filed**. For each document, fill in the fields marked with an asterisk, such as **FILED ON BEHALF OF** and **REFERS TO**, to show who is filing it and who it is about.

Check **Lead Document** on the main document in the filing, such as the complaint. Click **Next**.



9

Review the court fees

The **Court Fees** tab lists the fee for each document and the **EFM Fees** charged by the electronic filing manager, with the **Total Estimated Court Fees**. Make sure the right fee is chosen under **Fee Name** for each document (1), because the court may reject the filing if the correct fees are not selected. If a fee you need is not listed, click **Add Additional Services and Fees** (2).

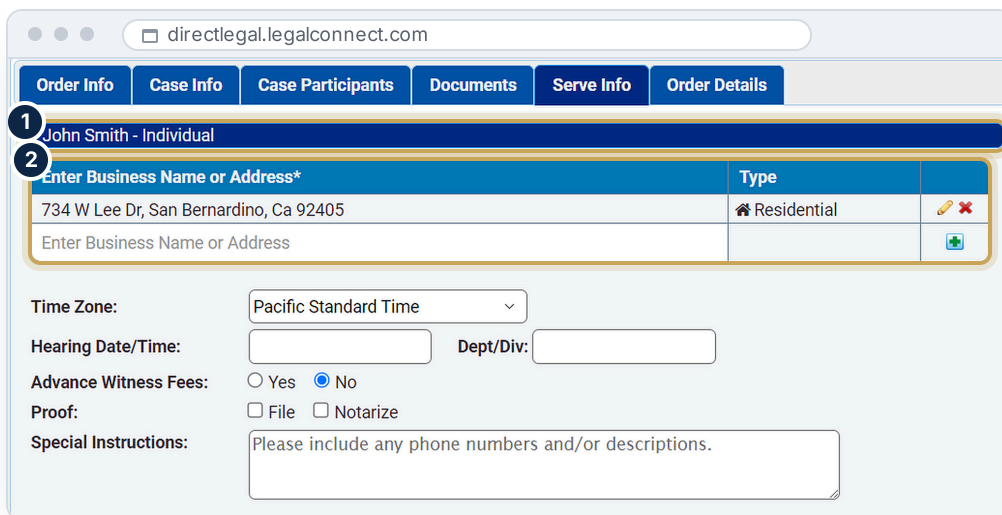
Under **Authorize Direct Legal Support to pay court fees**, choose **Yes** or **No** (3). Click **Next**.



9A If you are serving: add the service address

If you chose to serve the documents after filing, the **Serve Info** tab opens. Click a party's name to open the address fields.

In **Enter Business Name or Address**, enter the address where you would like us to serve the documents, then click the green **+** button to add it. Fill in any other details that apply, such as **Special Instructions**. Repeat for each party you need served, then click **Next**.



Order Info	Case Info	Case Participants	Documents	Serve Info	Order Details
1 John Smith - Individual					
2					
Enter Business Name or Address*		Type			
734 W Lee Dr, San Bernardino, Ca 92405		Residential			
Enter Business Name or Address					

Time Zone: Pacific Standard Time

Hearing Date/Time: Dept/Div:

Advance Witness Fees: ☐ Yes ☒ No

Proof: ☐ File ☐ Notarize

Special Instructions: Please include any phone numbers and/or descriptions.

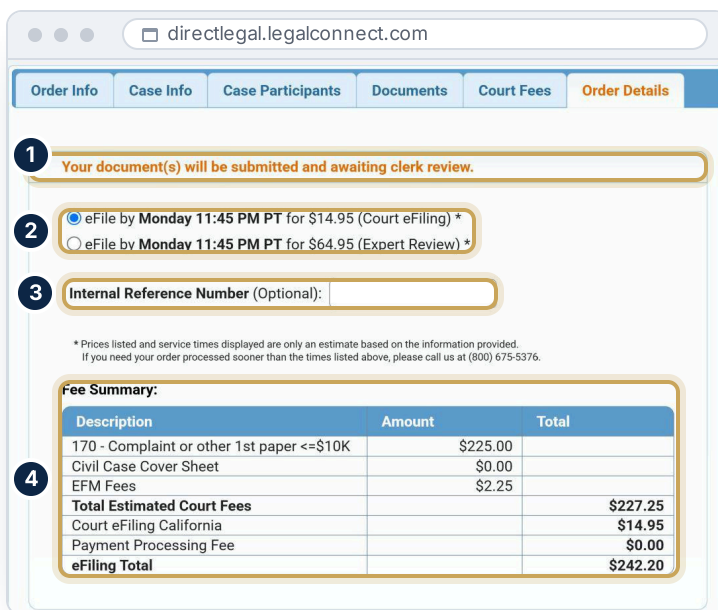
10

Choose your service level

On the **Order Details** tab, a notice says your documents will be submitted and awaiting clerk review (1). Choose a service level for the eFiling (2). If your firm tracks orders with its own number, enter it in **Internal Reference Number** (3).

If you are also having the documents served, open **When would you like this attempted?** and choose when we should attempt service.

The **Fee Summary** lists the court fees, the EFM fees, our eFiling fee and the total for your order (4). The prices and times shown are estimates based on the information you entered.



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Order Info Case Info Case Participants Documents Court Fees **Order Details**

1 Your document(s) will be submitted and awaiting clerk review.

2 ☒ eFile by Monday 11:45 PM PT for \$14.95 (Court eFiling) *
☐ eFile by Monday 11:45 PM PT for \$64.95 (Expert Review) *

3 Internal Reference Number (Optional):

* Prices listed and service times displayed are only an estimate based on the information provided.
 If you need your order processed sooner than the times listed above, please call us at (800) 675-5376.

4 **Fee Summary:**

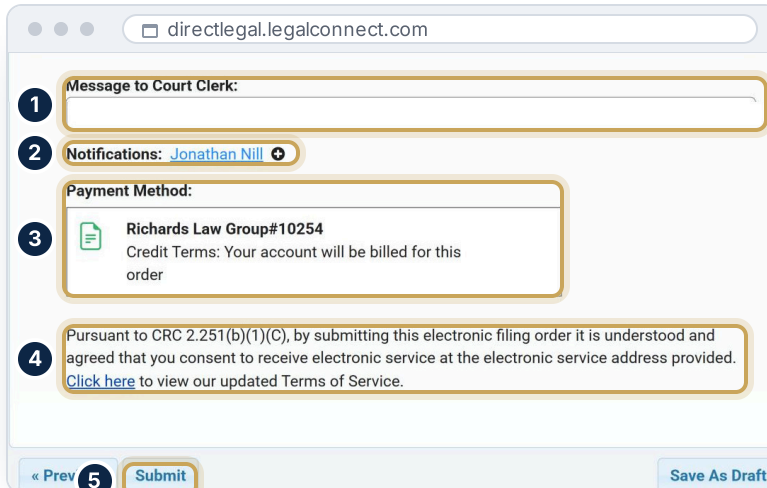
Description	Amount	Total
170 - Complaint or other 1st paper <=\$10K	\$225.00	
Civil Case Cover Sheet	\$0.00	
EFM Fees	\$2.25	
Total Estimated Court Fees		\$227.25
Court eFiling California		\$14.95
Payment Processing Fee		\$0.00
eFiling Total		\$242.20

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Add a message and submit

Type any **Message to Court Clerk** (1). **Notifications** shows who gets status updates about this order (2). Under **Payment Method**, check how the order will be paid (3).

By submitting an eFiling order, you consent to receive electronic service at the electronic service address you provided (4). When you are ready, click **Submit** (5).



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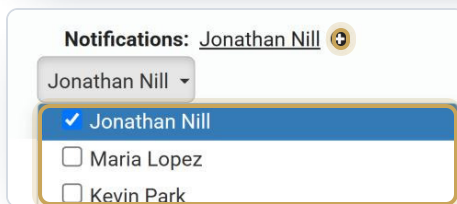
1 Message to Court Clerk:

2 Notifications: Jonathan Nill +

3 Payment Method: Richards Law Group#10254
Credit Terms: Your account will be billed for this order

4 Pursuant to CRC 2.251(b)(1)(C), by submitting this electronic filing order it is understood and agreed that you consent to receive electronic service at the electronic service address provided. [Click here](#) to view our updated Terms of Service.

« Prev 5 Submit Save As Draft



Notifications: Jonathan Nill +

Jonathan Nill

☒ Jonathan Nill

☐ Maria Lopez

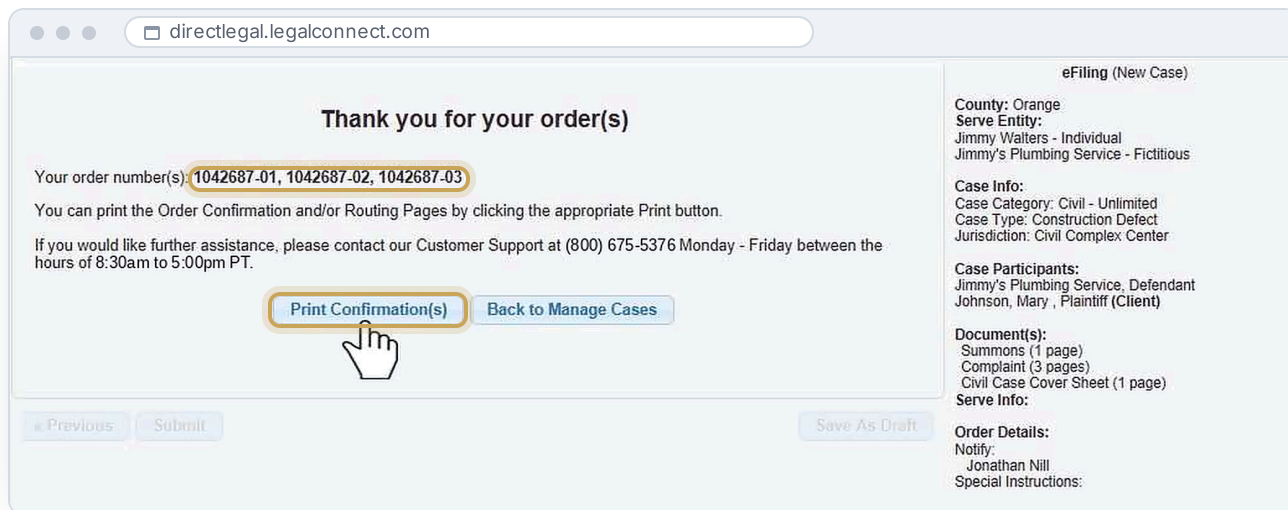
☐ Kevin Park

Notifications: You are listed by default. To add others, click the + icon next to the name, open the list and check each person who should get status updates.

12

Get your confirmation

Your order number appears to confirm that the order was placed. Click **Print Confirmation(s)** to keep a record of your order.



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Thank you for your order(s)

Your order number(s): **1042687-01, 1042687-02, 1042687-03**

You can print the Order Confirmation and/or Routing Pages by clicking the appropriate Print button.

If you would like further assistance, please contact our Customer Support at (800) 675-5376 Monday - Friday between the hours of 8:30am to 5:00pm PT.

Print Confirmation(s) **Back to Manage Cases**

Previous Submit Save As Draft

eFiling (New Case)

County: Orange
 Serve Entity:
 Jimmy Walters - Individual
 Jimmy's Plumbing Service - Fictitious

Case Info:
 Case Category: Civil - Unlimited
 Case Type: Construction Defect
 Jurisdiction: Civil Complex Center

Case Participants:
 Jimmy's Plumbing Service, Defendant
 Johnson, Mary, Plaintiff (Client)

Document(s):
 Summons (1 page)
 Complaint (3 pages)
 Civil Case Cover Sheet (1 page)

Serve Info:

Order Details:
 Notify:
 Jonathan Nill
 Special Instructions:

After you order

- ✓ Follow your eFiling under **Pending Orders** on your dashboard
- ✓ Find conformed copies under **Closed Orders** once the filing is complete

Good to know

Filing in a case that is already open? Choose **Subsequent Filing** in step 3. See our guide to eFiling for subsequent cases.

Filing in Texas, Illinois, Indiana or Maryland? See that state's eFiling guide.

Need it sooner than the times shown? Call us at **(800) 675-5376** before you place the order.

Questions? We're here to help.

Call our Litigation Division Monday to Friday, 8:30 a.m. to 5:00 p.m. Pacific, or email info@directlegal.com. Ready to order? [Log in to the portal](#).

(800) 675-5376