

# TOP TIP SERIES:

## AVOIDING EFILING REJECTIONS IN CALIFORNIA COURTS

First Legal has created this Top Tip Series to educate, raise awareness, enhance skills, reduce errors, and improve efficiencies by highlighting a single subject that directly relates to your daily work.

### GENERAL TIPS

- Ensure all pages of a Mandatory Judicial Council form are included. The most common examples are civil case cover sheets, substitutions of attorney, and requests for dismissal documents which are missing page 2 of the 2-page form. Although not necessarily required to fill out, it is required by the Court that the 2nd page is included.
- Multiple parties cannot be listed on substitution of attorney. For an SOA, you may only list one party per document.
- All parties must be listed on a single summons. Submitting separate summonses for each party on a new case or cross-complaint will result in rejection. If there are too many parties to fit on the first page of the summons form, you may use the Sum-200(A) "Additional Parties Attachment" to list the additional parties, and have it submitted attached to the actual summons.
- Parties listed on a summons must match the complaint (or X-Comp) exactly.
- When filing a stip & order, it is the submitting party's responsibility to ensure first appearance fees were already paid by all parties, and if they have not been, that submitter must pay the fees at the time of filing. Because of this, one of two scenarios will occur: 1) The court will automatically assess fees for all parties listed on the filing, or 2) the filing will be rejected because fees were not proactively selected. In the first scenario, the court will not refund fees. The filing party will need to request reimbursement from opposing counsel, which can be difficult in contentious cases.
- Flatten all PDFs. Many courts automatically reject a document when fillable forms are not flattened.
- Certain courts require a proposed order coversheet – you will want to confirm with the Court/department when the cover sheet is needed. Some courts only want them for orders prior to a hearing, others want for all, etc.
- Most Courts require the attorney and representing party information in the top-left corner of the proposed order/judgment documents. If in doubt, include the information or contact the department where the order is being signed.





## COURT-SPECIFIC TIPS

- Bookmarks: San Diego & Santa Cruz have a firm policy and will reject if missing.
- Searchable Text (OCR): LASC and San Diego have a firm policy and will reject if missing.
- In LASC Civil, if the department is a “Participating Department” and requires a Court reservation made via the Court’s “Court Reservation System” (CRS), the Court reservation receipt must be attached to the back of the motion or demurrer and the reservation number must be included on the caption page of the document. The following link provides a list of participating departments. Click [here](#) to view.
- Civil case cover sheet addendums are required for new case initiations in [LASC Civil](#) and [Santa Barbara Civil](#). The addendum must be attached to the CCCS in LASC and submitted as a separate document in Santa Barbara.
- In San Diego, for notice of lodgings, only the pleading is submitted for eFiling - the FULL NOL with exhibits attached is sent for filing OTC.
- Appeals and paying the notice of appeal fee, Reporter’s Transcript Fee, Court of appeal deposit
  - Los Angeles (and most other courts): can take the \$100.00 for the notice of appeal, but all other deposits must be paid at the Court (the \$775.00 for CACOA and Reporter’s Transcript fees)
  - The only Court that can take all appeal fee deposits is San Francisco. The only way they can capture those is by the filer submitting multiple documents on firm letterhead, stating:
    - Deposit of \$50.00 Admin Fee to Hold the Reporter Transcript
    - Deposit of \$XX.XX for the cost of the Reporter’s Transcript
    - Deposit of \$775.00 for the Appeal to Court of Appeal
    - Deposit of \$225.00 for the Notice of Appeal
- Orange County: can take the \$100.00 notice of appeal and \$775.00 CACOA deposit, but all other fees must be paid at the Court
- San Diego: all fees must be paid at the Court
- Filing Under Seal in SFSC requires the filer to submit both the redacted and unredacted versions of the document(s) in the same transaction. The File & Serve Express portal must be used if eFiling sealed documents directly.
- OCSC requires Word versions for proposed orders/stipulations and proposed orders for civil unlimited cases. Even if the stipulation has no signatures on the Word, OK to submit without. If the Judge needs a fully executed version, they will request upon reviewing the Word document. The only time you submit both versions is when you are specifically advised to do so, or when there is an Exhibit attached to the PDF that cannot be included on the Word document.



## TIPS FOR WORKING WITH A CONCIERGE SERVICE

- Although there are many advantages to using concierge service providers, they are typically not paralegals or legal secretaries. They are trained on the peculiarities of the various courts and court portals. They review documents for size, file type, file errors, unflattened form fields, blank pages, bookmarks, and text search. They will address any of these issues before a filing is submitted. Think of your concierge eFiler as a second set of eyes but not ultimately responsible for the content of the documents.
- Avoid blanket statements such as “advance all fees”.
  - In most eFiling courts, the filer must proactively select the fees - not all courts assess fees automatically. This is especially problematic when first appearance fees are due for a party (or parties) on a submission. There is no flag or indicator from the portal to show that first appearance fees are due for XX party(ies).
  - This also applies to complex fees. Indicate when complex fees are due and for how many parties. It may not be obvious that the case is complex when filing into it.
- When filing a notice of appeal in Superior Court, indicate the specific fee amounts and deposit types. Procedures and fees vary by court and some fees are paid over the counter vs. online.
- Make the document “type” as clear as possible in the title. The court portals offer limited options for document types. If you want your concierge service to submit a document as a declaration, it is best to lead with “Declaration” in the title. Consider this example: “Reply Declaration in Support of Motion” could be mistakenly submitted as a “Reply” and not as a “Declaration”. A better title is “Declaration in Support of Reply to Motion”.
- A concierge service is an extension of your team. They provide a valuable, time-saving service and can be a tremendous asset for a busy legal secretary. The tips listed above will help avoid miscommunications, but at the end of the day, your provider is there to fill the gap even if you are rushed and forget to dot an “i” or cross a “t”.

*For any questions or comments about the information provided, please let us know via this [link](#). We also welcome your suggestions for new topics!*

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