

Montgomery County Efiling

Process Server Instructions

Updated 5/16/18

Table of Contents

Process Servers: Standing Order/ Recurring or Case Specific Appointment	1
Request an Account	1
Process Servers: Standing Order/Recurring.....	1
Process Servers: Case Specific Appointment	1
To Access the Processors Queue	1
Deleting the Queue Entry	5
Filing the Service Return	6
Retrieving the Time Stamped Document.....	10

Process Servers: Standing Order/ Recurring or Case Specific Appointment

Montgomery County Clerk of Court along with Tybera has created a method in which Process Servers can pick up the Summons and Complaint electronically through the eFlex system. The Process Server may be appointed for a specific case, they may be a recurring Process Server for multiple cases, or they may have a Standing Order for the firm or individual. Regardless, all Process Servers are required to collect the documents through Montgomery County's eFiling system.

For the Recurring Process Server or those organizations/individuals covered by a Standing Order, they must request an eFiling account in order to access eFlex to print the Summons and Complaint and to file Returns of Service. If an organization would like a second account to file the Returns of Service, simply request another account. The second account will not be able to access the Queue Entries containing the Summons and Complaint; they will only be able to file the Returns of Service.

If a Process Server is only appointed for a specific case, a generic account has been established in eFlex. This Process Server does not need to request an eFiling account. They must contact the Clerk of Court's office at 937-225-4512 and request the username and password for the Generic Process Server eFlex account.

Once the account has been approved, or the generic account information is received, the Process Server can sign into eFlex and obtain the information from the system.

Request an Account

Process Servers: Standing Order/Recurring

Go to

- <http://www.mcclerkofcourts.org/efiling/process-server-user-account-form/> to assess the Process Server eFiling User Account Application form.
- Complete the Process Server eFiling User Account Application form
 - Submit the form via the Submit button (delivered via email)
- Once the Clerk of Court's office approves the account, an email will be sent to the email account provided in Request. The user can sign in and access the Process Server Queue

Process Servers: Case Specific Appointment

- Contact Clerk of Courts office at 937-225-4512 to obtain the username and password for the "generic" account

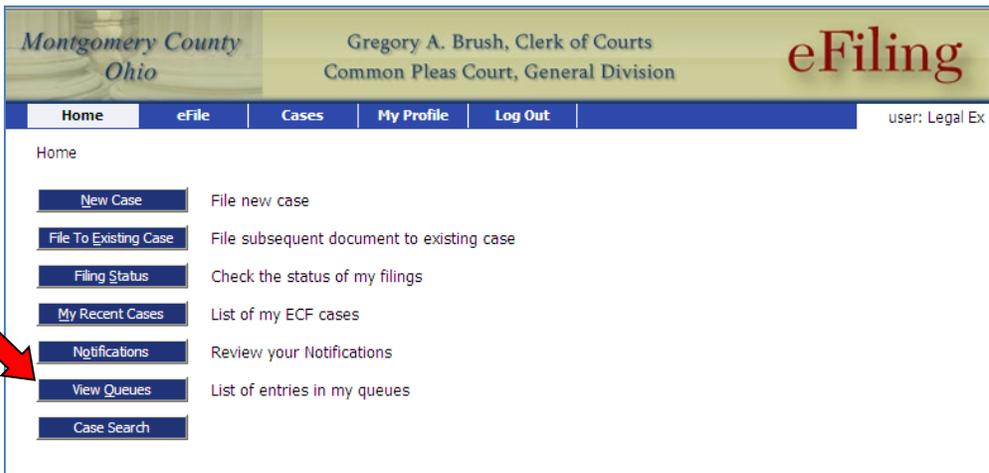
Once the username and password has been received, the user can sign in and access the Process Server Queue.

To Access the Processors Queue

- Sign into eFlex



- Click on the View Queues button
 - If there is a number next to the View Queues button – ignore the number – the number is not account specific



- Select Processors Queue from drop down menu next to “View Entries In”
 - Please note – If you have an eFiling user’s account you will only be able to see Queue Entries for your specific account
 - For the “Generic” Process Server account – you will see all cases to be served by Process Servers that do not have a specific eFiling user’s account.



- Click Refresh
- Click on Title link “Summons to be Served”
 - For the “Generic” Process Server account - Click on Title link “Summons to be Served” on the specific case you have been appointed to serve. In the event you can’t locate the case contact the Clerk’s Office.

Montgomery County Ohio | Gregory A. Brush, Clerk of Courts | Common Pleas Court, General Division | eFiling

Home | eFile | Cases | My Profile | Log Out | user: Legal Ex

Home ⇒ My Queue Entries

My Queue Entries

Refresh View Entries in: Processors Queue Assigned To: Legal Ex null: Today's Items
Number of entries displayed per page: 10

Queue	Title	Case Title	Case Number	Official File Stamp	Original Filer	Assigned To null	Deferred Date
<input type="checkbox"/> Processors Queue	Summons to be Served Test	WELLS FARGO BANK NA vs GARY LYNN HOWARD	2008 CV 00001	0	Legal Ex	Legal Ex	

1

Assign task to myself Delete

- Click on the Document Link in the Action Details

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Home | eFile | Cases | My Profile | Log Out | user: Legal Ex

Home ⇒ My Queue Entries ⇒ Action Details

Action Details

Case Number: 2008 CV 00001 **Plaintiff:** WELLS FARGO BANK NA
Case Title: WELLS FARGO BANK NA vs GARY LYNN HOWARD **Defendant:** GARY LYNN HOWARD et al
Case Type: Civil **Judge:** MARY KATHERINE HUFFMAN - Department 7544
Opened: 01-02-2008

Document Information - Assigned To Legal Ex

Document Link	Document	File Date	Original Filer
3311f31b-b41f-4640-a6a3-27e65d818642.pdf	Summons to be Served Test	06-26-2012	Legal Ex

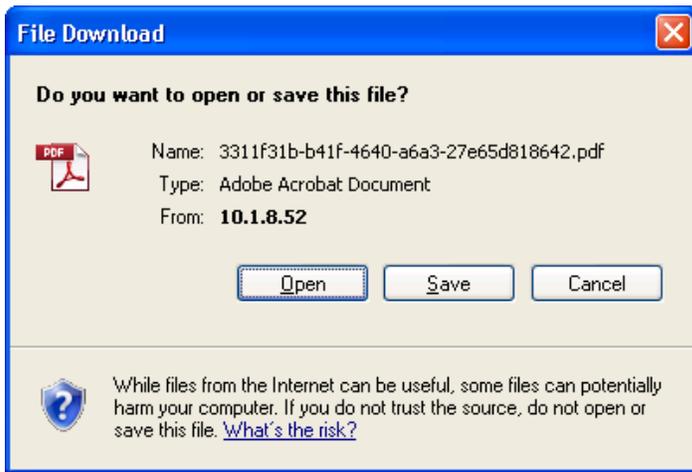
Note History None

Reassign To: Unassign Queue: Date Deferred

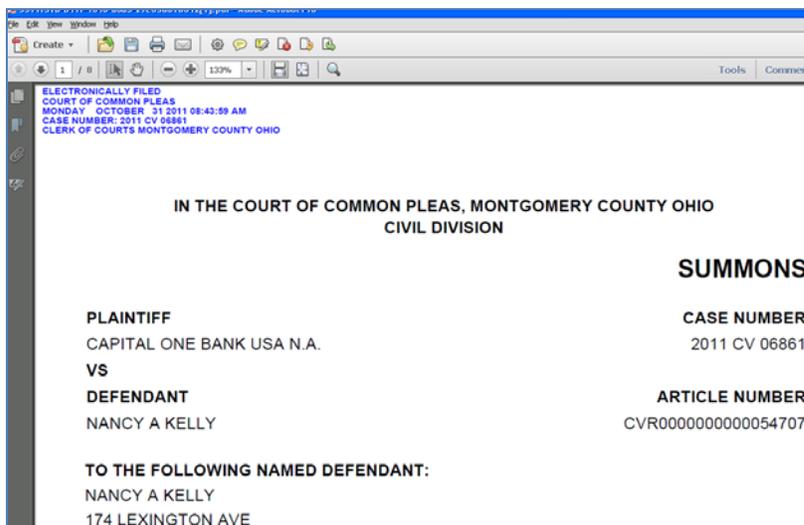
Add Note:

Back File on this case Delete Reassign

- The File Download Dialog box will open - Click on Open



- Print the Summons Packet to serve – This is what you will see if your package is less than 20 MB **OR**



- If the package is larger than 20MB – click on the link provided in the PDF

The document you requested can be retrieved from the following location:
<http://www.clerk.co.montgomery.oh.us/pstransfer/getfile.aspx?name=71315aac-2c14-4ee3-9b0f-9784ef634963>

- The Summons packet will open
- Print the Summons Packet to be served

Deleting the Queue Entry

Once the Summons Packet has been printed the Queue Entry must be deleted.

- Click delete in the Action Details Page **OR**

Montgomery County Ohio Gregory A. Brush, Clerk of Courts Common Pleas Court, General Division eFiling

Home eFile Cases My Profile Log Out user: Legal Ex

Home ⇒ My Queue Entries ⇒ Action Details

Action Details

Case Number: 2008 CV 00001
Case Title: WELLS FARGO BANK NA vs GARY LYNN HOWARD
Case Type: Civil
Opened: 01-02-2008

Plaintiff: WELLS FARGO BANK NA
Defendant: GARY LYNN HOWARD et al
Judge: MARY KATHERINE HUFFMAN - Department 7544

Document Information - Assigned To Legal Ex:

Document Link	Document	File Date	Original Filer
3311f31b-b41f-4640-a6a3-27e65d819e42.pdf	Summons to be Served Test	06-26-2012	Legal Ex

Note History: None

Reassign To: Unassign Queue: Date Deferred

Add Note:

Back File on this case Delete Reassign

- Click on the Back Button to return to “My Queue Entries Page”
- Select which one to delete
 - **For the Generic Process Server account - NOTE: Only delete the case that you have been appointed to serve.**
- Click Delete

Montgomery County Ohio Gregory A. Brush, Clerk of Courts Common Pleas Court, General Division eFiling

Home eFile Cases My Profile Log Out user: Legal Ex

Home ⇒ My Queue Entries

My Queue Entries

Refresh View Entries in: Processors Queue Assigned To: Legal Ex null: Today's Items

Number of entries displayed per page: 10

<input type="checkbox"/>	Queue	Title	Case Title	Case Number	Official File Stamp	Original Filer	Assigned To	null	Deferred Date
<input type="checkbox"/>	Processors Queue	Summons to be Served Test	WELLS FARGO BANK NA vs GARY LYNN HOWARD	2008 CV 00001	0	Legal Ex	Legal Ex		

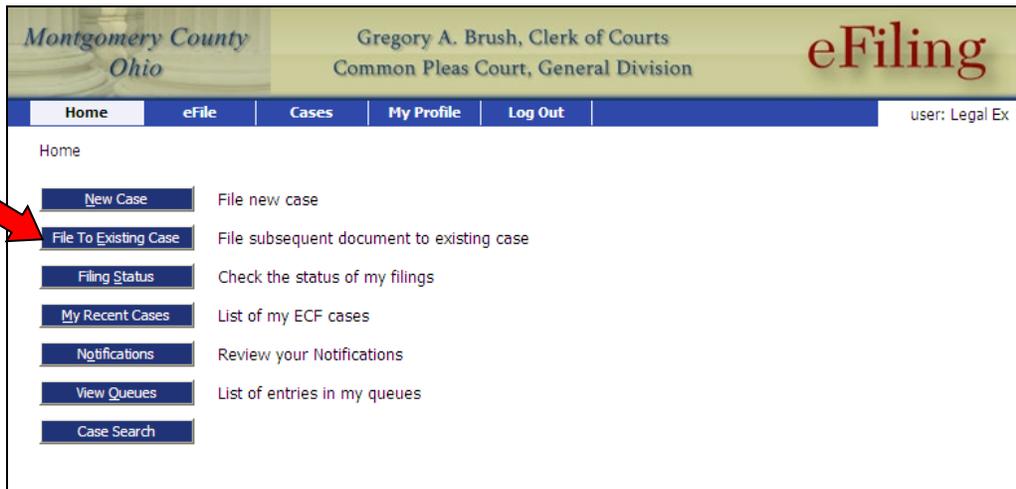
1

Assign task to myself Delete

Filing the Service Return

The Return of Service completed by the Process Server will now be filed electronically. The Return of Service must in a PDF format. It is important the document is a properly formatted PDF, preferably PDF/A.

- Sign Into eFlex
- Click **File to Existing Case**



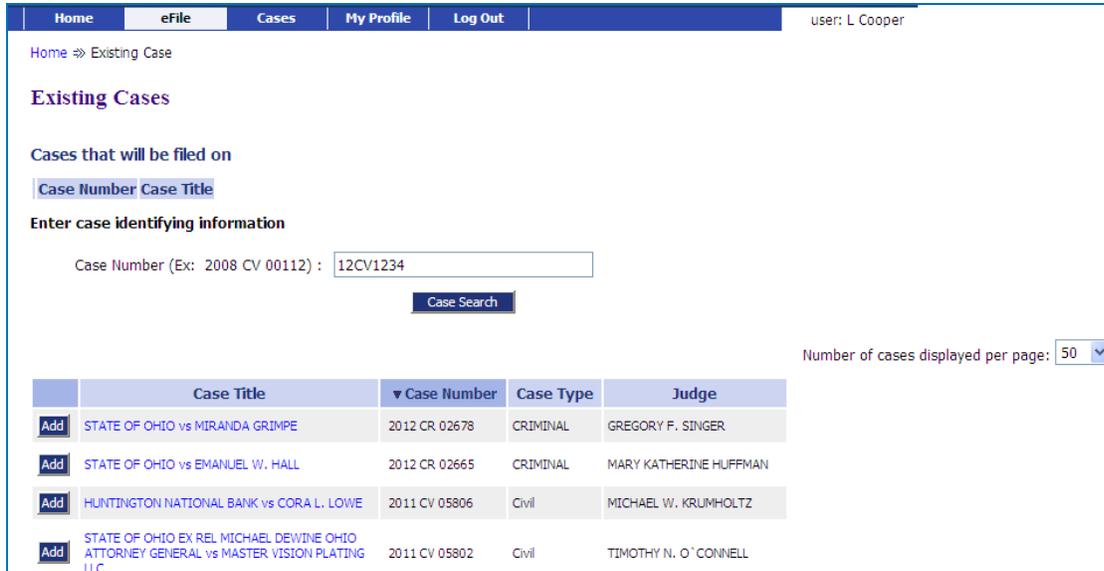
Montgomery County Ohio Gregory A. Brush, Clerk of Courts Common Pleas Court, General Division eFiling

Home eFile Cases My Profile Log Out user: Legal Ex

Home

- New Case File new case
- File To Existing Case** File subsequent document to existing case
- Filing Status Check the status of my filings
- My Recent Cases List of my ECF cases
- Notifications Review your Notifications
- View Queues List of entries in my queues
- Case Search

- Enter the case number;



Home eFile Cases My Profile Log Out user: L Cooper

Home ⇒ Existing Case

Existing Cases

Cases that will be filed on

Case Number Case Title

Enter case identifying information

Case Number (Ex: 2008 CV 00112) :

Case Search

Number of cases displayed per page: 50

	Case Title	Case Number	Case Type	Judge
Add	STATE OF OHIO vs MIRANDA GRIMPE	2012 CR 02678	CRIMINAL	GREGORY F. SINGER
Add	STATE OF OHIO vs EMANUEL W. HALL	2012 CR 02665	CRIMINAL	MARY KATHERINE HUFFMAN
Add	HUNTINGTON NATIONAL BANK vs CORA L. LOWE	2011 CV 05806	Civil	MICHAEL W. KRUMHOLTZ
Add	STATE OF OHIO EX REL MICHAEL DEWINE OHIO ATTORNEY GENERAL vs MASTER VISION PLATING LLC	2011 CV 05802	Civil	TIMOTHY N. O'CONNELL

- Click on Case Search

Existing Cases

Cases that will be filed on

Case Number Case Title

Enter case identifying information

Case Number (Ex: 2008 CV 00112) :

Case Number	Case Title	Action
2012 CV 01234	DEFENDANT, TEST BBB	<input type="button" value="Add this case to your list"/> <input type="button" value="Submit"/>
2012 CV 01234	STATE OF OHIO	<input type="button" value="Add this case to your list"/> <input type="button" value="Submit"/>

- Click Submit
- Once you have selected the case(s), the Add a Document page is displayed for that case:

Home » Existing Case » Add a Document

Case Number : 2010 CV 05641 Case Title : TEST PLAINTIFF vs TEST DEFENDANT

Case Type : Civil

Document Category

Document Type *

AdditionalText *

Emergency

Document Location

Add to Submission

Document Name	View Document	Edit Data	Size	Pg Count	Remove
Modify Party Information			0.01 MB		

****Note that the Case Number is now highlighted in a bright yellow bar to indicate that you are currently filing to an existing case with its case number also displayed.**

- Document Category – select Service Returns
- Document Type – Service Return filed by Process Server
- Additional Text – successful or failure on (enter name of party)
- Click on Browse and select the return (saved as a properly formatted PDF)
 - Double click on the document or single click and select open
- Click Add
 - If you have multiple Service Returns to file in the same submission – select the proper Document Type – add the appropriate Additional Text – load the next PDF
- Click Next when you have all your Return of Service documents loaded
- Review any of the documents loaded if needed

Review and Approve Filing

Case Number : 2008 CV 00001 Case Title : WELLS FARGO BANK NA

Case Type : Civil

Document(s) to be Submitted: [Add/Remove Documents](#)

Document Name	View Document
Service Return Process Server SUCCESSFUL SERVICE ON GARY LYNN HOWARD ON 07/02/2012	PROCESS SERVER RETURN.p

Use the link on the participants name to update their information.

Modified	Participant Name	Role
	WELLS FARGO BANK NA	Plaintiff
	GARY LYNN HOWARD	Defendant
	DENA M HOWARD	Defendant
	MONTGOMERY COUNTY TREASURER	Defendant

Special Filing Instructions:

[Back](#) [Cancel \(Delete\)](#) [Move to Draft](#) [Next](#)

- Click Next
- Click OK to submit to the Court
- Click on Filing Status

Montgomery County Ohio Gregory A. Brush, Clerk of Courts
Common Pleas Court, General Division eFiling

Home eFile Cases My Profile Log Out user: Legal Ex

Home ⇒ Existing Case ⇒ Submission Confirmation

Your Filing has been submitted

Case Type: Civil - Service Return Process Server

Note: This filing is now being processed and added to the Clerk of Court document repository. Once ECF has stored the documents associated with your filing, a receipt will be issued to you. You may view the status of this filing, and access your receipt for 60 days, after which it will be purged from this system. The documents will be retained and available long term through the Clerk of Court.

[Filing Status](#)

- Click Go to refresh
 - The Service Return is at the Clerk's office and awaiting their approval

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Home eFile Cases My Profile Log Out user: Legal Ex

Filing Status

My Filings

Legal Ex Filings
Report Criteria:

View Filings Between: 07/03/2012 AND [] Clear Dates

Go

My Filings Between 07/03/2012 and Today

Delete

<input type="checkbox"/>	Submitted	Documents	Filer Ref No.	Case Title	Court Case #	Status
<input type="checkbox"/>	07-03-2012:08:49:15 AM	Service Return Process Server		WELLS FARGO BANK NA vs GARY LYNN HOWARD	2008 CV 00001	Awaiting Approval

Number of Filings: 1

- From the Home Page - Click Filing Status to check any returns that have been submitted for approval

Montgomery County Ohio Gregory A. Brush, Clerk of Courts Common Pleas Court, General Division eFiling

Home eFile Cases My Profile Log Out user: Legal Ex

Home

- New Case File new case
- Existing Case File subsequent document to existing case
- Filing Status** Check the status of my filings
- My Recent Cases List of my ECF cases
- Notifications Review your Notifications
- View Queues List of entries in my queues
- Case Search

- Please note the filing status always defaults to the current date. Click on the calendar and pick the date needed for the Filing Status search.
- The filing status changes to Filed once the Clerk staff approves the filing

Home eFile Cases My Profile Log Out user: Legal Ex

Home ⇒ Filing Status

My Filings

Legal Ex Filings
Report Criteria:

View Filings Between: 07/03/2012 AND [] Clear Dates

Go

My Filings Between 07/03/2012 and Today

Delete

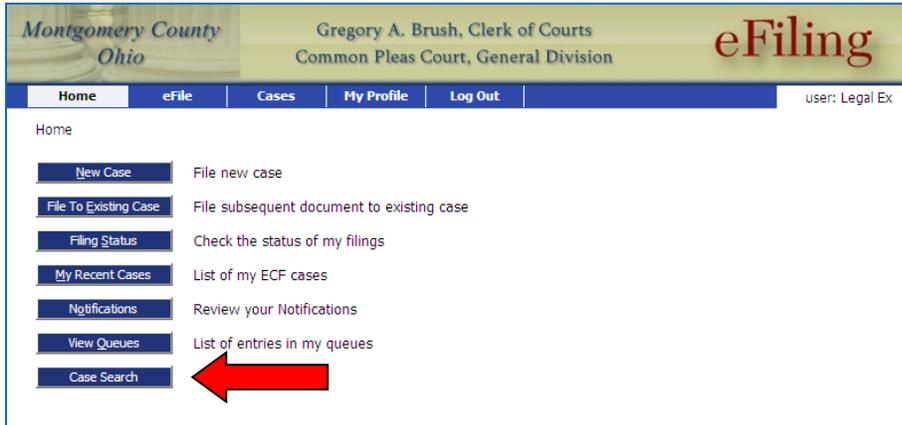
<input type="checkbox"/>	Submitted	Documents	Filer Ref No.	Case Title	Court Case #	Status
<input type="checkbox"/>	07-10-2012:09:09:56 AM	Queue Assignment		WELLS FARGO BANK NA vs GARY LYNN HOWARD	2008 CV 00001	Filed
<input type="checkbox"/>	07-05-2012:08:58:32 AM	Service Return filed by Process Server		WELLS FARGO BANK NA vs GARY LYNN HOWARD	2008 CV 00001	Awaiting Approval
<input type="checkbox"/>	07-03-2012:08:49:15 AM	Service Return filed by Process Server		WELLS FARGO BANK NA vs GARY LYNN HOWARD	2008 CV 00001	Receipt Pending

Number of Filings: 3

Retrieving the Time Stamped Document

The time stamped Return of Service will be available on the Clerk of Courts PRO site.

- Click Case Search



- PRO will appear in a new window

