

# How to File Online

- ➤ If you experience any problems with this site, please contact Icon Toll Free at 866-501-4266.
- If you do not receive your e-mail notifications, please check your SPAM and Junk Mail folders.
- If you are using Internet Explorer, please make sure you are using Internet Explorer 9 or higher.

**Step 1: Go to www.maineprobate.net/efiling**. If you already have an account with Maine Probate EZ-File, continue to **Step 3**.

#### Step2: Create Your Account

Before you can submit a filing, you will be required to create an account. This will provide you with many benefits, including the ability to build your filing over time and the ability to track your filing once it has been submitted to the court.

To set up your account, click the *Create Account* button in the center of your screen.



The *Account Sign Up* screen will appear. Enter the information requested.

If you are an attorney, be sure to check the *Attorney* check box. This will ensure that you are automatically added as the attorney on each case you file. If you do not check the Attorney box, you will be automatically added as the Petitioner to each case you file. When the Attorney box is checked, fields for **bar number** and **firm name** will appear.



Each jurisdiction that Icon currently offers e-filing for will be listed in the second half of the screen. Check the box next to each jurisdiction that you would like to e-file with.

**Please Note:** Once your account is set up, you will be able to request access to additional jurisdictions at any time via the **Edit Account Information** link.

**Please Note:** Based on the e-filing policies in the court you are requesting access to, your account may have to be approved by the court before you are allowed to file. If this is the case, you will receive an e-mail when your access to that county has been granted.

In the middle of the screen, your primary email address is requested. This is the email address that will serve as your username. You may also enter up to 3 additional email addresses to receive notifications for your account.

# Title: First: Middle: Suffix: Address: Address 2: City/State/Zip: Phone: Attorney? ☑ CUMBERLAND Probate Court Requesting accounts for the following counties: PENOBSCOT Probate Court **VYORK Probate Court** Primary Email Address: Email (again for verification): You may enter up to 3 additional email addresses for notification purposes:

#### Sign up for an Account:

Create a password for your account and also enter your mother's maiden name. Your mother's maiden name will be used to retrieve your password if it is ever forgotten.

At the bottom of the screen, you can enter your credit card information and have this information stored on file.

You can also set up an ACH account to have your filing fees debited from your bank account.

**Please Note:** If you choose the ACH option, you will need to fill out the ACH agreement which can be found by clicking on the link in the ACH section.



**Please Note:** You are not required to enter payment information to complete your account set up.

Password:	
Password (again for verification):	
Mother's maiden name:	
f you would like to setup a credit card for payment now, please enter	the below.
Credit Card Type: Visa	
Credit Card #:	
Expiration Date: 01 ▼ 2012 ▼	
Name on Card:	
Security Number:	
Security Number.	
you would like to setup an ACH account for payment now, please ente	
you would like to setup an ACH account for payment now, please enterse note that you MUST fill out and fax an ACH request form first. To off form now, please click here.	
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at name would you like to call this account (Ex: My Visa Card)?  you would like to setup an ACH account for payment now, please enter ase note that you MUST fill out and fax an ACH request form first. To o form now, please click here.  Bank Name: Routing Number:	
you would like to setup an ACH account (Ex: My Visa Card)?  you would like to setup an ACH account for payment now, please enter asse note that you MUST fill out and fax an ACH request form first. To a form now, please click here.  Bank Name: Routing Number: Account Number: Account Number:	

Once you have filled out all requested information, enter the *image code* and click *Create Account*. A pop-up message will appear confirming that your information has been saved. It will also give you instructions on how to verify and activate your account.

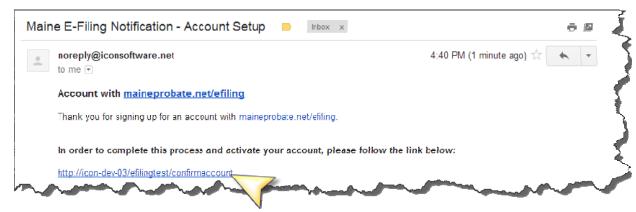


\*\*Before you will be able to create your filing, you will need to verify and activate your account.\*\* To do so, check the e-mail account your Maine Probate EZ-File account is set up under. You will have an e-mail from noreply@maineprobate.net in your inbox.

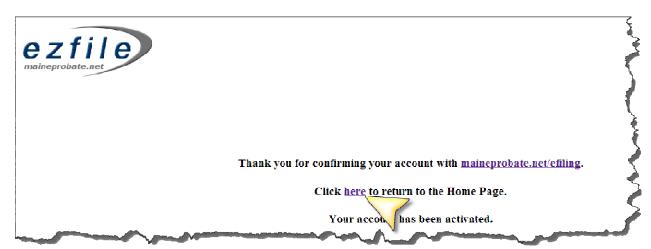
**Please Note:** If you do not receive this e-mail, please check your SPAM or junk mail folder and make sure your account allows e-mails from **noreply@maineprobate.net**.



Click the link at the bottom of the email to complete your account set up.



Once you click on the link, a pop-up window will appear confirming that your account is activated.



You can click on the link in the pop-up window to take you to the Maine Probate EZ-File home page.



# Step 3: Log In

Enter your **e-mail address** as your user name then enter the **password** you created. Click **Remember me next time** to have your user name saved for the next time you log on. Enter the **Image Code.** Click **Log In**.

Please Note: Passwords are case sensitive.



If you have forgotten your password, click *Forgot Password*. This will prompt you to enter your e-mail address and mother's maiden name.





Once you click **Send Password**, a pop-up will appear letting you know a temporary password has been sent to your email address on file.

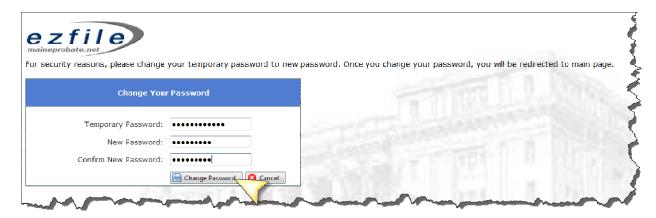


Click **OK** then check your email to retrieve your temporary password.



When you return to the Maine Probate EZ-File log in screen, enter your email address and temporary password then click *Log In*.

You will be prompted to change your password. To do so, enter your temporary password, then the new password you would like to use. Finally, re-enter the new password you would like to use and click *Change Password*. You will then be taken to the home screen.





#### Step 4: Creating Your Filing

Once you are logged in, the home screen will display **All** filings you have submitted through the Maine Probate EZ-File system.

You can filter the cases by:

- > **Approved** -filings that have been approved by the court
- Approved Pending Payment Filings that have been reviewed by the court, but the actual filing fee differs from the estimated fee shown on the checkout screen when the filing was submitted
- > **Denied** filings that have been denied by the court
- Pending Approval filings that have been submitted to the court and are waiting to be approved
- > Saved filings that are in process, but have not been submitted to the court

The cases under each section can also be sorted by clicking on the white heading at the top of the column. Once you have sorted the cases, the *Clear Sort* button will appear. To set the sort order back to the default order, click the *Clear Sort* button.

To create a new filing, click File a New Case.



## **Case Information**

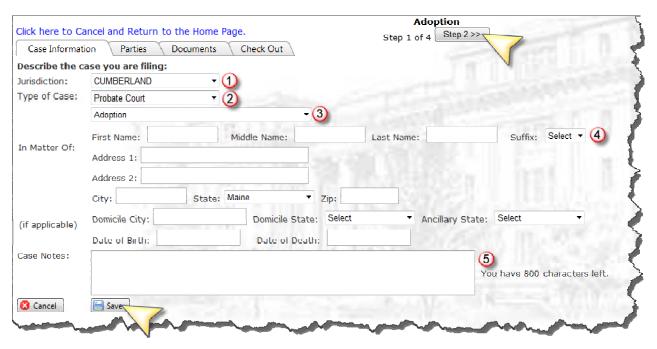
Select the *Jurisdiction* (1) you are filing in. Then select the *Court* (2) and *Type of Case* (3). Then enter the *In Matter Of* (4) information.

If you would like to submit additional notes to the court on this filing, please enter them in the *Case Notes* (5) field. The *Case Notes* field is optional.

Once you have entered in the basic filing information, click **Step 2** at the top of the screen or on the **Parties** tab to continue.

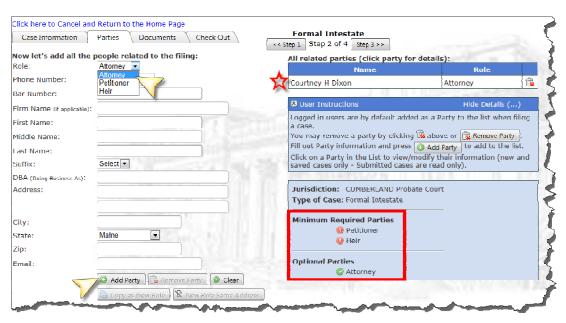
**Please Note:** At any time, you may click **Cancel** to cancel and return to the home screen or click **Save** to save your information and complete your filing at a later time.





# **Parties**

On the **Parties** screen, you will automatically be added as the **Petitioner** or **Attorney** depending on your account set up.





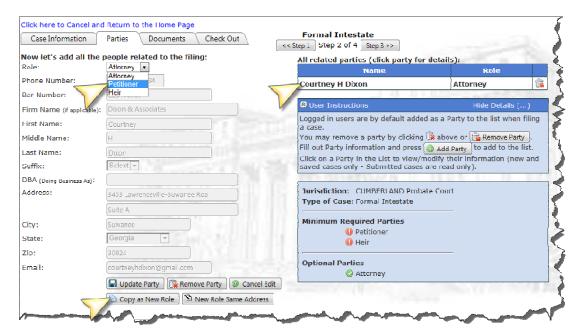
# **Required Parties**

Depending on the type of filing you are submitting, the court will require specific parties be added to the case. Parties required by the court to submit the filing are listed under *Minimum Required Parties*. As a required party is added to the filing, the red button next to the party type will turn green.

To add a party, select the *Role* from the dropdown then enter the party's information and click **Add Party**.

**Please Note:** If you attempt to add a party without entering all required information, you will see a pop-up letting you know what information you are missing.

The same party can be added as two different roles, i.e. John Doe can be listed as both the Petitioner and the Attorney. To add the same party under a new role, click on the party name under *All Related Parties*. The party's information will appear in the fields to the left. Select a new role for the party from the dropdown list then click *Copy as New Role*. Click *Add Party* and the party will appear under *All Related Parties* on the right as the new role.





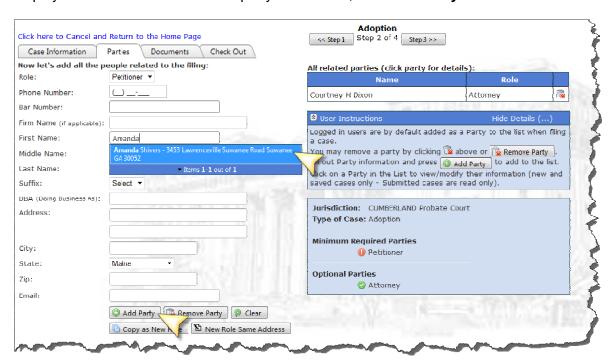
# **Optional Parties**

You may also add any optional parties listed in the *Role* dropdown.

To add optional parties, select the *role* of the party from the dropdown list. Fill out the information for the party then click *Add Party*. The name of the party will appear under *All Related Parties* on the right.

## Registered Filers

A database of registered filers is maintained in the Maine Probate EZ-File system. When you begin typing a party's bar number, first name or last name, you will see any matching results appear in the dropdown. If you see a party you would like to add to your filing in the dropdown, click on the name and the party's information will be displayed in the fields. To add the party to the case, click **Add Party**.



Once the filing is imported by the court, registered filers are notified of their addition to a filing through an email similar to the one shown below. Registed filers are also notified by email each time there is activity on the case.

**Please note:** Party information for registered filers cannot be modified.





# **EService**

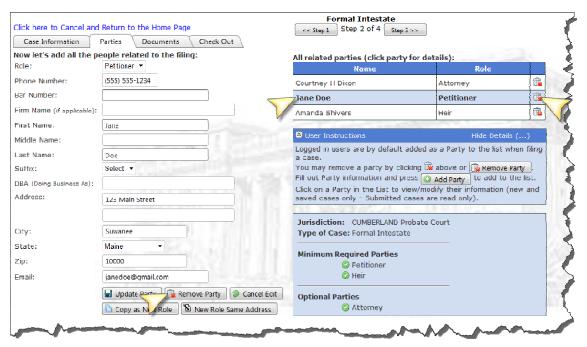
Registered filers are also eligible for EService. After the filing has been approved by the court, you will be able to visit the **Parties** screen and view the service information for all registered filers on your filing.

For more information on EService, please see *Page 24* of this document.

## **Modifying Parties**

Once a party has been added to the filing, it can be modified by clicking on the name under *All Related Parties*. The name will be in bold and the party's information will be displayed in the fields to the left. Make any needed changes then click *Update Party* to save the changes.

To remove a party from the filing, click the *trashcan icon* next to the party's name or click on the name under *All Related Parties* then click *Remove Party* at the bottom of the screen.



Once all parties have been added, click **Step 3** or the **Documents tab** to move to the **Documents** section of the filing.

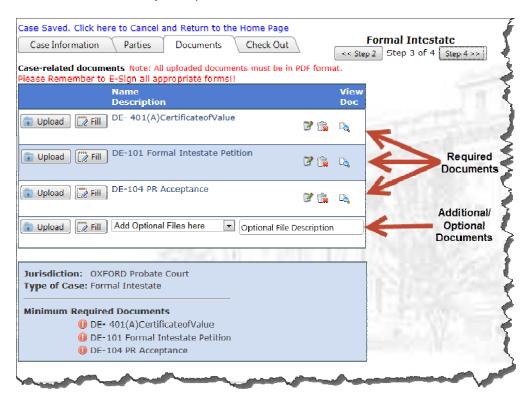
#### **Documents**

On the **Documents** screen, you will have the ability to **Upload** or **Fill** documents associated with your filing. Some courts may not allow both methods for every form.

Each document that is required by the court will be listed. You will also have the option to upload additional documents by selecting the type of document from the dropdown list.



**Please Note:** You will be required to give the document a description if you choose **Other Document** as your optional document.

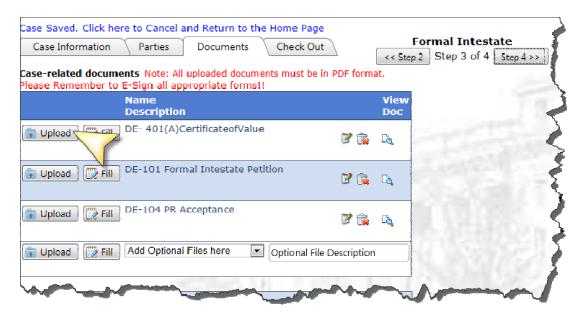


Upload: Use this method if you have the document saved on your computer and want to upload the file. This is a similar process to attaching a document to an email.

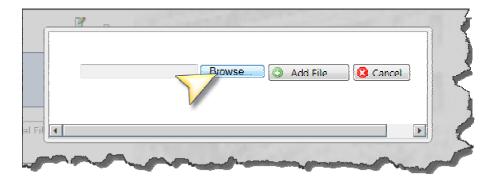
**Please Note:** The file must be saved in PDF format to be uploaded.

To upload to the Maine Probate EZ-File application, click the *Upload* button.

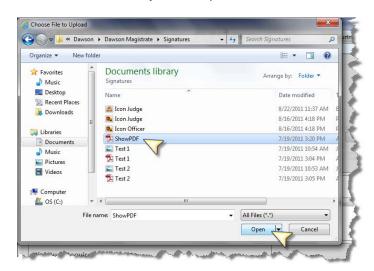




#### Then click Browse.



Find the location on your computer where the file is saved, then click *Open*.

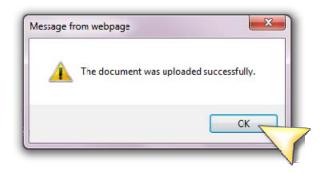




The location of the file will be displayed in the box. Click **Add File** to attach the document to your filing.

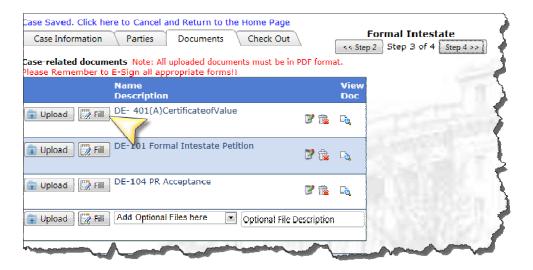


A pop-up will appear confirming the file has been uploaded successfully.



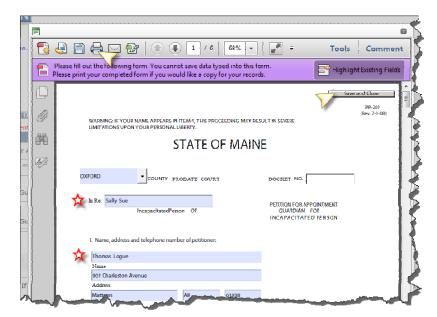
Fill: Use this method to fill out a PDF copy of the form and submit it directly to the application. You can also use this option to fill out a form that requires a signature. The form can be filled out, then printed and scanned and saved to your computer then uploaded following the instructions for uploading.

Click the *Fill* button and a fillable PDF form will appear.





**Please Note:** The **In Matter Of** information, as well as any party information already entered on the **Parties** screen will be automatically filled in on the PDF form. Any additional information entered on the first form will carry over to subsequent forms without having to be re-entered.

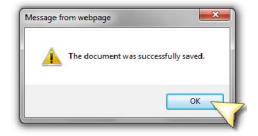


Complete any fields not automatically filled in, then click **Save and Close**.

**Please Note:** If you do not click **Save and Close**, your information will be lost. Clicking **Save and Close** will only save the information you have entered. It will **NOT** submit your filing to the court. You will still be able to make changes to this information until you complete the check-out process. Each time you make changes, you will need to click **Save and Close** to save the changes you have made.

**Please Note:** You will not be able to save a completed copy of this form to your computer. You will be able to print a copy of the completed form for your records by right-clicking then selecting **Print** or clicking the **printer icon** at the top of the screen.

Once you click **Save and Close**, you will see a pop-up confirming that your form information is successfully saved. Click **OK** to return to the Documents screen.

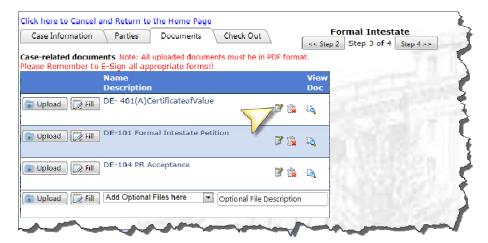




To reaccess the form to modify, click *Fill* again. The document will appear in the PDF window. Make any necessary changes, then click *Save and Close*.

# **Modifying File Descriptions & Viewing Completed Documents**

To modify a file description, click on the *notepad icon* rext to the file name.

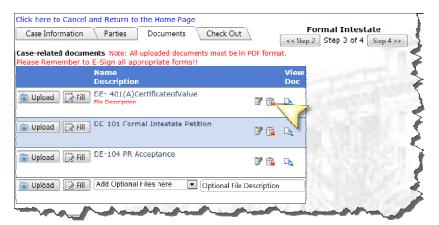


Make the necessary changes, then click the **green** button to save your changes or the **red** button to cancel.

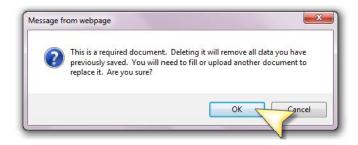


To delete a file you have added, click the *trashcan icon* is next to the document name.



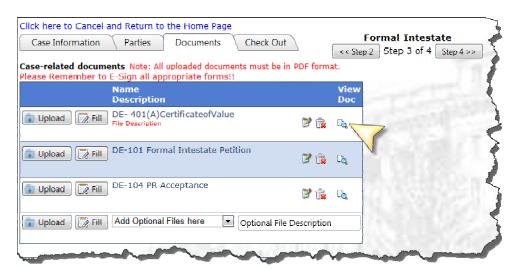


A pop-up will appear confirming that you want to delete the document and letting you know you will need to replace it with a new document if it is a required document. Click **OK** to remove the document or **Cancel** to keep the document as part of the filing.



**Please Note:** If you delete a required document, you will need to upload or fill another document in its place before you will be able to move to the check out screen.

You can view a completed document by clicking on the *magnifying glass* are next to the file name.





The document will appear in a window to the right. To close the document preview, click the  $\boldsymbol{X}$  in the top right corner of the document.

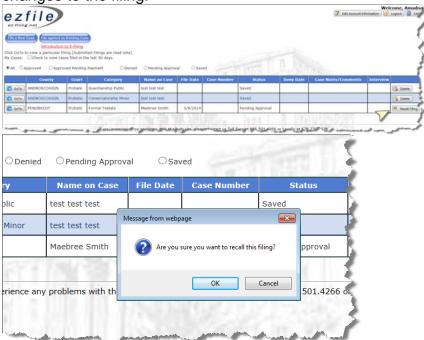


When all documents have been added, click on the **Step 4** or the **Check Out** tab to move on to the checkout screen.



# Recalling a case

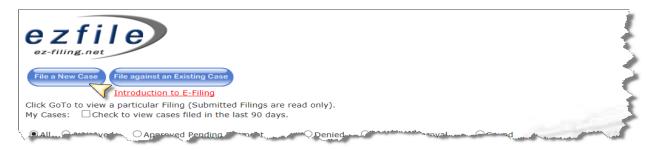
This is a feature that was added so users could edit a filing even after checking out. The filer can recall the case all the way up until the county imports the filing. If the filer wishes to recall the case they will not be charged and can make changes to the filing.



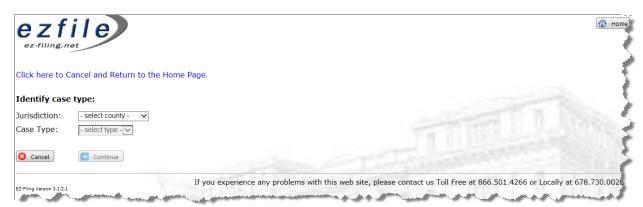


# **E-filing with Interview**

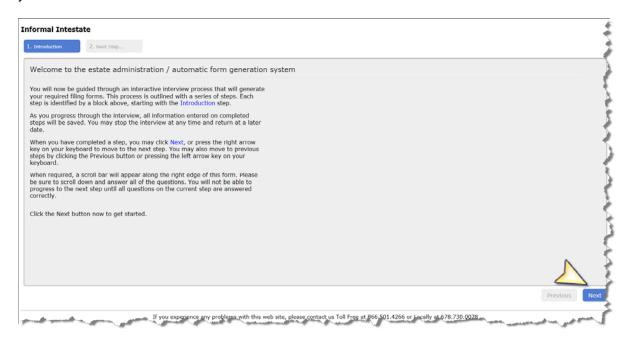
Click file New Case to begin.



Pick Jurisdiction and the Case Type.



You will then come to the introduction screen. Once you have reviewed the information you will click next.



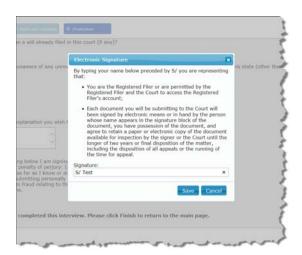


This will then bring you to the list of questions. After answering the questions on on each page you will click next at the bottom of the screen.



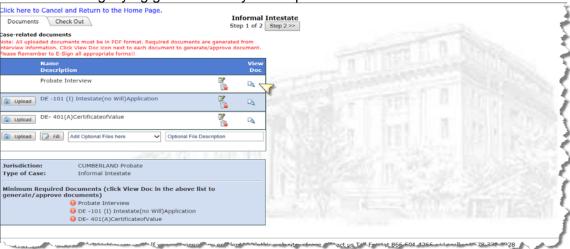
Once the interview answers are complete you will click finish.

Once you click finish you will be prompted to electrontically sign the efiling. After you have electrontically signed the filing you will click save.





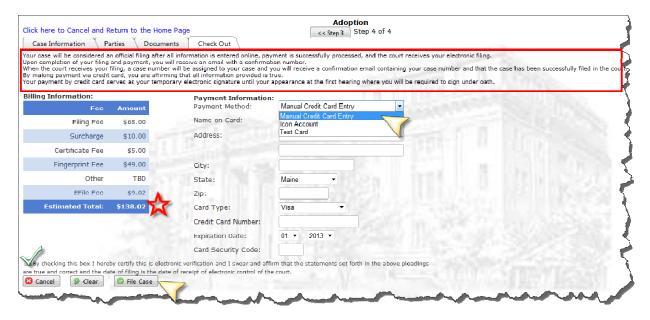
You will then be brought to the documents portion of the efiling process. You will have to click on the magnifying glass to satisfy the required documents.



\*\*\*\*Please note that once you have all the document satisfied you will still have to check out. Please go onto step 5.

#### Step 5: Checking Out

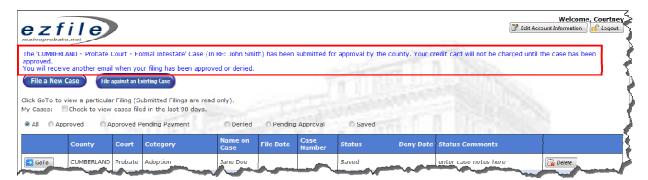
On the *Check Out* screen read the terms and conditions at the top of the screen. The *Estimated Fees* associated with your filing will be automatically calculated and the estimated total will be shown in the *Estimated Total* box. Select your method of payment from the dropdown list and enter the required information. Check the box at the bottom of the screen to agree to the terms of the filing then click *File Case*.





# **Confirmation**

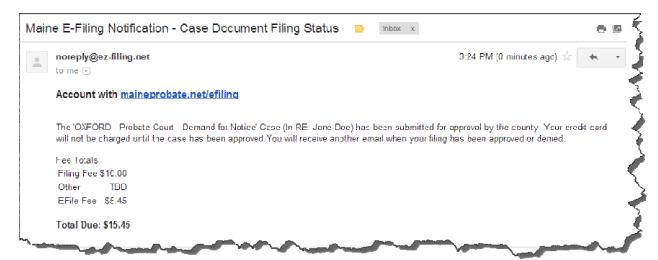
Once you submit your filing, you will be returned to the main screen. There will be a message at the top of the screen confirming that your filing has been submitted and that your credit card or bank account will not be charged until it is approved by the court.



You will receive multiple emails as your case is processed by the court:

#### **Email 1: Maine Probate EZ-File Confirmation**

This email confirms that your filing was accepted by Maine Probate EZ-File and has been submitted to the county for approval. Your filing has **NOT** been approved by the court at this point and your credit card or bank account has **NOT** been charged.





# Email 2: Court Acceptance & Case Number

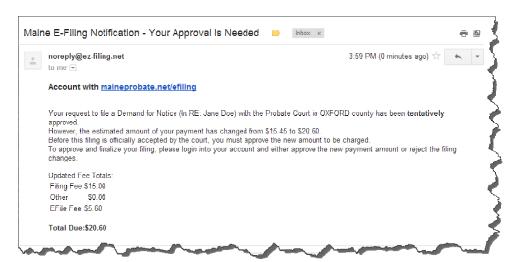
This email confirms that your filing has been approved by the court and your credit card or bank account has been charged and also includes the authorization number. Your case number will also be included in this email.



**Please Note:** If your filing is denied by the court, you will receive an email detailing why it was denied. You will be able to make modifications to your filing and resubmit it to the court. You will have **7 days** from your original filing date to resubmit your filing and maintain your original filing date.

## Tentative Approval Email

If the actual fees for your filing differ from the estimated fees shown on the checkout screen, you will receive an email similar to the one shown below letting you know the actual total you will be charged for the filing.





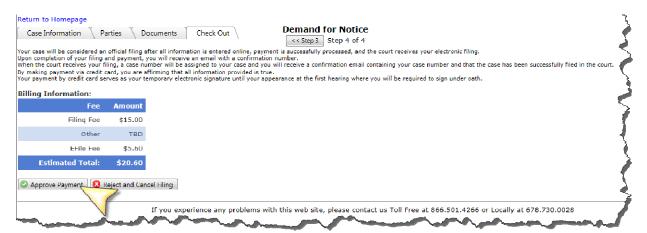
You will have to approve the new payment amount before the court can officially accept your filing. To do this, go to your Maine Probate EZ-File home page and filter your cases by *Approved Pending Payment*.



Click *GoTo* next to the filing you need to approve payment for. A pop-up will appear notifying you that the fees have been changed and need to be approved. Click *OK*.



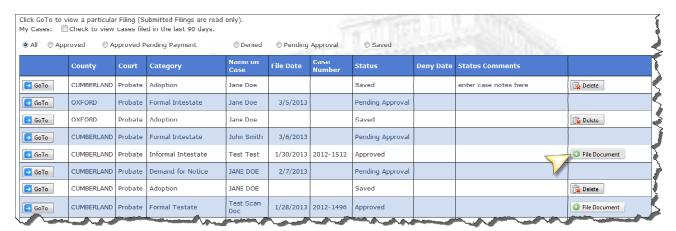
You will be taken to the *Check Out* tab. Click *Approve Payment* to accept the fee change or *Reject and Cancel Filing* to reject the fee change and cancel your filing.





# **Filing Subsequent Documents**

After you have received the email confirming court acceptance and providing your case number, you will have the ability to upload subsequent documents to the case. From the Maine Probate EZ-File homepage, find the case you would like to add additional documents to and click *File Document* in the column on the far right.

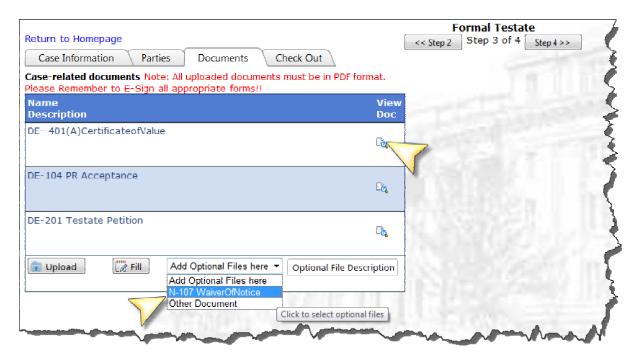


You will be taken to **Step 3** (the documents section). Any document that is already added to the case can be viewed by clicking on the magnifying glass next to the file name. To add a new file, select the type of document you would like to add from the dropdown list. If the specific document you are looking for is not listed, select **Other Document**.

If you select **Other Document**, you will be prompted to specify a description for the document before proceeding. Enter this information in the **Optional File Description** box next to the **Other Document** dropdown.

Follow the steps starting on *Page 11* to add your document to the filing.

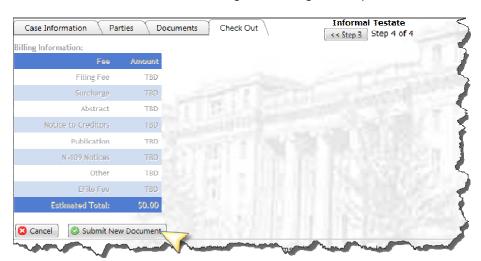




Once you have added all documents, click **Step 4** or the **Checkout Tab** to continue to the checkout screen.

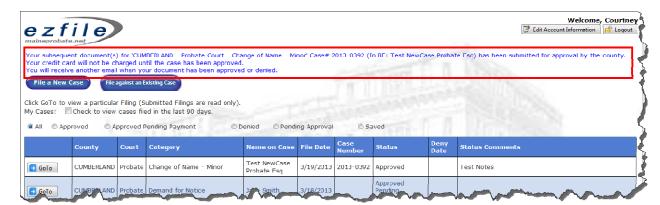
On the checkout screen, click **Submit New Document** to finish adding your subsequent document(s).

Please Note: You will not be charged for filing subsequent documents.

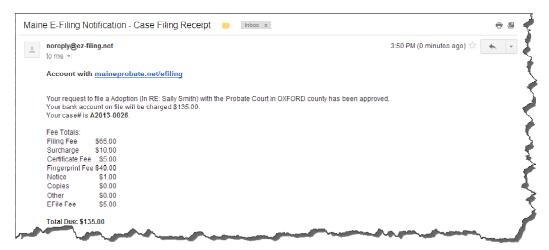


Once you click **Submit New Document**, you will be returned to the Maine Probate EZ-File homepage and a confirmation of your action will be listed at the top of the screen.



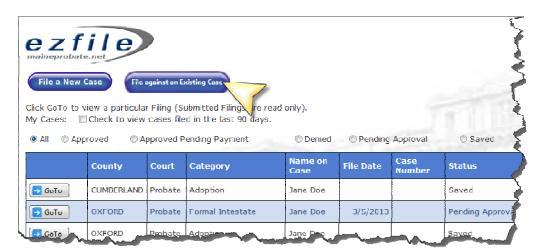


You will also receive an email confirming your action to the email address on file.



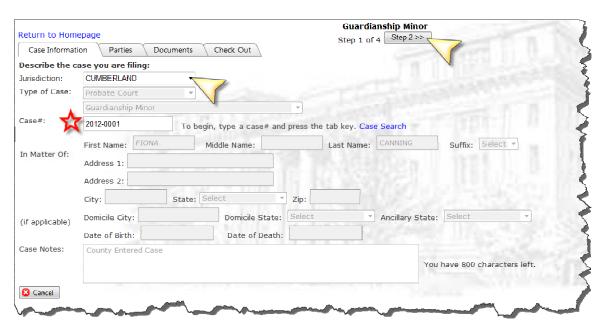
## Creating a Filing Related to an Existing Case

To create a filing related to an existing case, go to the Maine Probate EZ-File homepage and click *File against an Existing Case*.

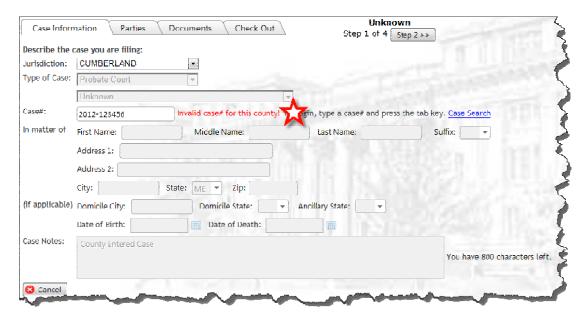




Enter the *Jurisdiction t*hen enter the *Case Number* for the case your filing is related to. If you do not know the case number, click the *Case Search* link. This link will take you to <a href="https://www.MaineProbate.net">www.MaineProbate.net</a> where you can look up the case and determine the case number.



**Please Note:** If you do not have a valid case number, the system will alert you and you will not be able to move forward.



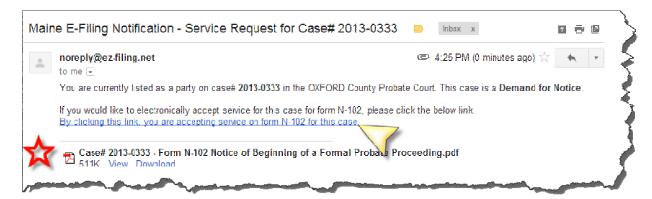
Complete your filing by following the steps for adding documents and checking out, starting on *Page 11* of this document.

**Please Note:** You will be able to view parties listed on the case, but you will not be able to add, delete or modify parties.



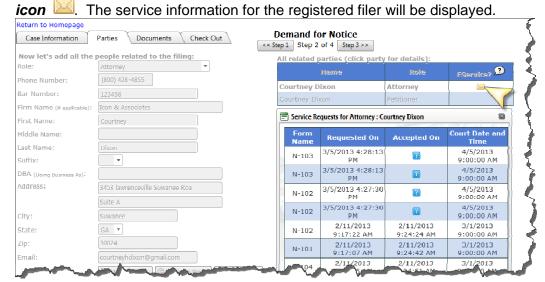
## **EService Additional Information**

All parties eligible for EService will be sent an email similar to the one below and will be able to accept service by clicking on the link in the email. The service document is also attached to the email as a PDF document which can be viewed or downloaded.



Once the party accepts service, an Acceptance of Service document will be automatically generated and will be available for you to view when you access the case on the Maine Probate EZ-File site.

To view service information for a party, go to the *Parties* tab and click on the *envelope* 

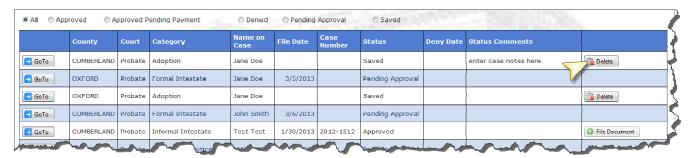


Additionally, each registered filer will be alerted by email each time something new is filed on the case.



# **Deleting Saved Filings**

Filings are automatically saved as you complete each step. To delete a saved filing and have it removed from your dashboard, click the **Delete** button in the far right column.



A pop-up will appear confirming you would like to delete the filing. Click **OK** to confirm the deletion and the filing will be removed from your dashboard. Click **Cancel** to keep the saved filing on your dashboard.

