

## A Complete Checklist for Selecting a Certified eFiling Service Provider

When interviewing a new electronic filing service provider (EFSP) you want to cut through the hype, collect credible information, and find the best match for your firm. These questions will help in your decision-making process to evaluate any organization that wants to be a [preferred vendor](#) for your eFiling services.

### #1: Scope of service

- How many California counties and courts does the EFSP serve with its court eFiling solution? It is far more productive and cost-effective to use an EFSP that eFiles into *all* [California eFiling](#) courts, not just some.
- Does the provider offer additional litigation services such as courtesy copy delivery and service of process?
- Does the EFSP have a well-documented performance and acceptance rate with the courts?

### #2: Performance and productivity

- How many ways does the vendor deploy its eFiling and other litigation support services; through a portal, application programming interface (API) or both?
- If using the EFSP's portal, is it user friendly and does it provide instant access to all the eFiling courts?
- Are court-stamped documents returned quickly and reliably? What about custom reports and analytics?
- Can the EFSP's eFiling platform integrate with a law firm's practice management system? Can the vendor provide interoperability with a law firm's accounting systems to automate eFiling spend and reconciliation, and reduce manual record keeping?

### #3: Domain knowledge and court filing expertise

- How much experience does the EFSP have in the California court system with eFiling and physical court services?
- What is the provider's level of expertise and service offerings through its portal with [courtesy copy delivery](#), [document retrieval](#), [service of process](#), and other related services?
- What customer support options does the provider offer? Is phone, chatbot, and other online options available?

### #4: Performance metrics

- Does the EFSP provide [performance metrics](#) such as eFiling turnaround times for the various courts? Other important metrics include eFiling success rates, user behavior, and order data. Ask if they are available for review.
- Can the provider benchmark its acceptance rates and rejection rates against the rest of the industry?
- Your staff will perform routine work in submitting each eFiling order. Can the provider explain how that work is distributed across your law firm so you can assess efficiencies and productivity?

### #5: References

- What is the eFiling service provider's [track record and history](#) working with the courts?
- What do the courts say about this provider? Does it have references from the courts they work with?
- Does the EFSP have references from any of the courts' electronic filing managers (EFM) vendors that integrate with the EFSP's offering? These are companies that provide the actual eFiling systems and court case management systems to the courts, so the vendor you select should have excellent relationships with them.

### Let's get started.

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