

Process Server

Instructions

Montgomery County Probate Court has created a method in which process servers can pick up the “service packet” electronically through the eFlex system. The process server is appointed within a specific case and is then required to collect the “service packet” through the Montgomery County’s eFiling system. A generic account has been established in eFlex for these process servers. A process server does not need to request an eFiling account but will need to contact the Court and request the user name and password for this generic account. You can contact the Court at 937-225-4649. The process server will sign into eFlex and obtain the “service packet” from the system.

To Access the Service Queue – Process Server

- Sign into the eFlex system.
- Click on View Queues button. If there is a number next to the View Queues button, ignore it.
- On the My Queue Entries page beside Filter By – View Entries in: click the dropdown and choose “Service Queue – Process Server”. Then click the “Go” button.
- A list of all the cases to be served by process servers will appear.
- Under the “Title” column click on the link, “Service Packet – Process Server”, for the specific case in which you have been appointed to serve. Keep in mind there are others there so be sure to choose the right case. In the event you can’t locate the case contact the Court at 937-225-4649.
- The Action Details page is displayed.
- Click on the link under the column titled “Document Link”.
- The file download dialog box will come up, click on Open.
- The documents to be served will open.
- You will now print the “service packet”.
- Once the “service packet” has been printed the Queue Entry must be cleared out.
- At the bottom of the Action Details page you will click the “Complete” button.

Filing the Service Return

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

- Sign into the eFlex system. If you do not have this information you will need to contact the Court at 937-225-4649.
- Click on the Existing Case button, the My Cases page is displayed.
- Enter the case number in the box and click the eFile button, the Add a Document page is displayed.
- Click on the dropdown beside Document Type and choose the appropriate one listed. You will see two (2) Process Server Returns listed:
 - 1st one (document type 5) is where you include on the Return your charges for serving
 - 2nd one (document type 5-) is where you DON'T include on the Return your charges for serving
- Click in the box beside Additional Text and insert either WITH or WITHOUT SERVICE – then enter name of party. (WITHOUT SERVICE – JANE DOE)
- 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 the “Add” button. If you have multiple Returns to file for the same case – select the proper Document Type – add the appropriate Additional Text – load the next PDF.
- Under the “On Behalf Of” column click the dropdown and choose the party that has appointed you to serve. This party will be the one responsible for the fees.
- Click the “Next” button when you have all your Return documents loaded.
- The Review and Approve Filing page will display. At this time you may review any document loaded, if needed.
- Click the “Submit the Filing” button to submit your Return to the Court.
- A pop-up appears; click OK to file to the Court.
- Click on the “Filing Status” button to view the status of your filing. The Return is at the Clerk’s office and awaiting their approval.
- From the Home Page – click the “My Filings” button to check the status of your filing. Once approved by the Court the status changes to “Filed”.

NOTE: The filing status always defaults to the current date. You may need to broaden the search by clicking in the empty box to the right of “View Filings Between” then click the “Go” button.

Retrieving a time stamped document

- The time stamped Return of Service will be available on the Court’s website: <http://www.mcoho.org/probate>