CT Corporation

SOP Intake Portal
E-Delivery

Benefits of E-Delivery
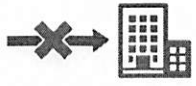
- You no longer need to handle those heavy, bulky documents
  - Cost savings on materials, reducing carbon footprint
  - Documents go straight from your device to the portal
    - *You can drag & drop multiple documents at the same time*
  - Simply stop by at any point in the day to finish commanding service
- Improved process & service time
  - Shorter wait time in the office!
  - Ability to make service changes prior to your arrival
  - Ability to view images of your uploads & make changes at any point prior to job approval by a CT Associate
- Ability to upload up to 50 service documents under one Job ID!

Introducing Electronic Upload

The SOP Intake Portal has now added functionality that allows you to electronically upload your SOP documents from the comfort and safety of your home, office, car...or anywhere really!

E-Delivery – What's New!

Current features & functionality with additional benefits!

✓	☁	Ability to enter & upload all SOP Service Documents (PDFs) under one Job directly into the Intake Portal
✓	🏢	No longer need to bring the physical SOP Service Documents to our CT office
✓	👍	Just stop by our CT office with your Job ID to finish commanding service and receive your acknowledgment receipt

"Don't worry! You still have the ability to create a hand delivery job for SOP documents that contain attachments that cannot be uploaded, such as cash, checks, compact discs. etc."

E-Delivery - Frequently Asked Questions

What is the difference between e-delivery & hand-delivery?
E-delivery provides you the ability to upload your service documents from your PC directly to our intake portal prior to your arrival to our CT office. This allows you to be able to just bring your job confirmation number and quickly and easily deliver your process in a fraction of the time. Traditional hand-delivery would require that you bring all service documents into our CT office.

Do I still have an option to hand-deliver?
Yes! You can select your desired service option under delivery method in the portal.

What type of service documents cannot be e-delivered?
Documents containing cash, check, disc., etc. – a separate hand-delivered job is required for those document types.

If I e-deliver will I receive a name for my proof of service?
E-delivery still requires that you make an appearance at our office to finish commanding service. Once an appearance is made you will receive the name of the intake associate handling your job.

Are there PC compatibility requirements? Certain types of software needs?
A PC with an up-to-date version of Google Chrome, Firefox.

Is there a maximum number of documents I can upload under one Job ID?
A job can have a maximum of 50 documents.

How can I view my documents after I have uploaded?
After a document has been uploaded by you and then reviewed by CT, the document can be viewed within the portal.

Can I replace a document with a new image or add to it after I have already uploaded it?
A document can be replaced or removed prior to submitting the job.

Is there a max number of pages that can be uploaded per document?
The maximum file size that can be uploaded per document is 25 MB.

Can I cancel a job after I have uploaded?
A job that is not needed or created by accident can be cancelled before submitting it. Any unsubmitted jobs will disappear from the dashboard after 14 days.

What happens if I upload the incorrect document to an entry?
A document can be replaced or removed prior to submitting the job.

What happens if I have uploaded a document and my entity selection needs to be updated but the image is correct?
The correct entity should be added to the job and the document should be uploaded to that line. The previous entry should be removed.

Will I still receive a service acknowledgement via email if I use e-delivery?
Yes. Once your job is reviewed and you appear in person at our CT office a service acknowledgment will be emailed to you.

What happens if I receive a message that my file is corrupted?
You can delete the case line or re-upload a new version of the file. If you do not have a clean version of the file, the case line must be deleted and you must bring the physical document to our CT office as a hand-delivery job.

If a job was already received am I still able to make changes?
No changes can be made on a job reviewed and received by CT.

My case status has not changed from validating, why?
There may be system issues that would cause this rare event. Please contact your local CT office and provide them with the Job ID in question.

If there are potential errors on my job how will I know and how will I know which items I need to review?
The system will notify you of errors in the job by displaying 'Exception' on the job dashboard. You can then go into the job details and the cases in error will have the error description that must be fixed by you.

Can I still bring in copies of physical documents that were uploaded using e-delivery?
Yes. You may still bring in courtesy copies of any documents uploaded using e-delivery however the documents that have been uploaded will be the ones forwarded for delivery. The clients I work for do not provide access to their electronic files and my service documents are already printed out for me.

What are my options?
Hand-delivery is still an available option. For a time-savings approach you can also choose to scan the documents using a home/office scanner, save it locally and upload it to the intake portal using the e-delivery option.

The clients I work for will not email service documents over to CT Corp.?
E-delivery is not a service where documents are required to be emailed. E-delivery offers an express opportunity to upload your service documents directly to our intake portal resulting in a quicker processing time. Some of my clients need certain documents to be printed, signed, dated, and personally served.

How can I serve these documents types to CT Corp.?
Documents with special circumstances can still be served to CT Corp. using the hand-delivery option.

I have no access to a computer can I submit an e-delivery job via a cellular phone or tablet?
Yes. The intake portal is mobile friendly and can be accessed by using a mobile device that has the capability of uploading electronic files.

I accidently submitted a job that I do not need, can I delete it?
While we are working on a delete job feature, you can simply disregard the job for now and it will disappear from the main dashboard within 14 days. You can also use the same job to add new entries with new documents you intend to serve as well as remove older entries that you will no longer be serving.

Does e-delivery mean documents have been served electronically and not via a process server?
No. The e-delivery method is an express delivery option that guarantees a quicker processing time but does not eliminate the need for a process server to appear at our CT office to certify service.

Why do I need two separate job types if some of the documents I intend to serve contain a check, disc., or cash?
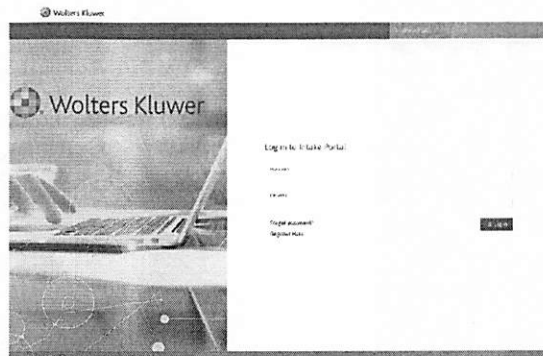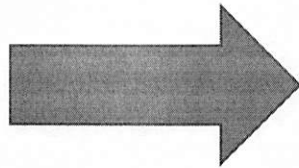Documents containing a check, disc., or cash unfortunately cannot be uploaded using e-delivery and the hand-delivery option should be selected for these types of documents.
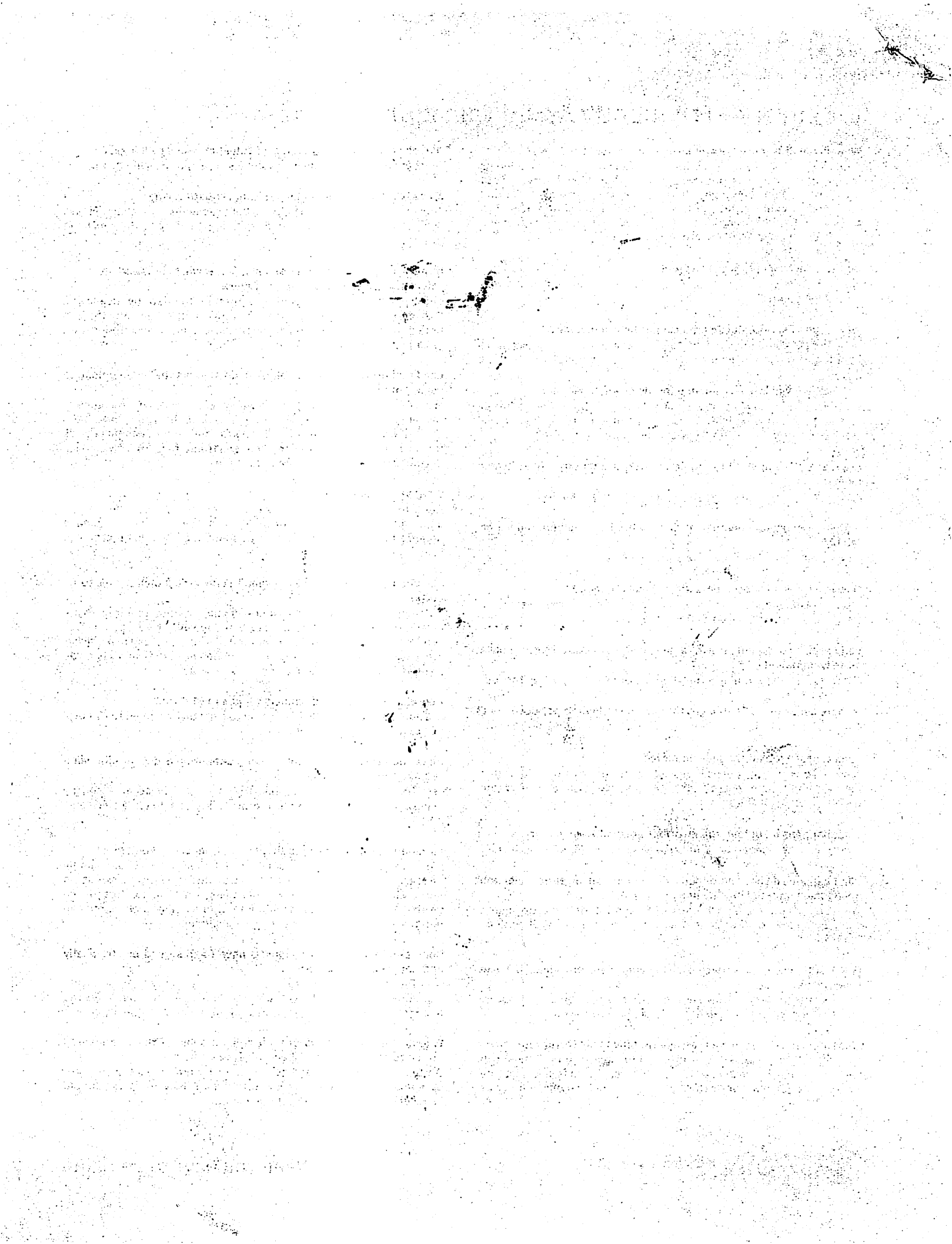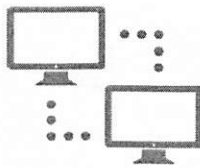
CT CORPORATION'S INTAKE PORTAL e-DELIVERY GUIDE

1. In your web browser, type "intake.ctcorporation.com" (**PLEASE NOTE**: Do **NOT** type www.; enter the site the exact way it is shown above.)
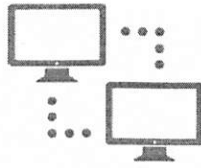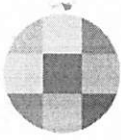

Your screen should come up like this

2. If you do not have a pre-existing sign in, please choose "**Register Here**" (*If you already have a log in, skip to step 5*)

3. Begin filling out the registration page with your information. Any field marked with (*) is required in order to complete your registration successfully. (*Please select the State location on where you will be serving your documents to the most. Also take note of the password requirements to successfully create a password that'll enable you to click the "***Registration***" button when finished.*)

4. Once registration is complete, you will receive a confirmation detailing that an Admin will verify your request. When your account has been verified, you will receive a confirmation email and then you will be able to successfully log in to begin creating jobs.
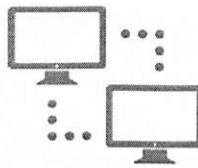
5. Once you've successfully logged in, you will be defaulted to the "**Create Job**" tab. Based on your registration, your information will be prepopulated for the jurisdiction you chose to serve. If you are serving documents in a different location other than the main site you've selected, you have the option to change the jurisdiction for the specific job you are about to create.

6. Next, you will need to select the "**e-Delivery**" delivery method. (*e-Delivery: Upload documents in Portal with job entry details and physically appear to acknowledge delivery and receipt.*) *****NOTE**: *Hand Delivery is **mandatory** for any document containing a **hardcopy**; that includes but is not limited to: checks, cash, any multimedia device, or any form of object that acts as presenting evidence belonging to the documents you will be serving.*

7. In the field "**Entity Name**" is where you will type and search for the entity you wish to serve. (*If the entity you've entered has no match in the database, you will select "**Add Entity**" that will appear in the top righthand corner; and manually enter the entity name you wish to serve.*)

8. When you've selected/input the correct entity name you wish to serve, it will appear to the right of the search field bar. From there, click the box under "**No. of Services**" and enter the amount of separate services you will be serving for that specific entity. (***NOT** number of pages in service.*) *****NOTE**: *Once you've selected an entity, the delivery method cannot be changed. If the delivery method is incorrect, please create a new job with the correct delivery method. If you wish to create an e-delivery job later, this job will automatically save for you and you can re-open it by searching your saved "**Job Status**" under the "**Retrieve Job**" tab*

9. After you've entered the "**No. of Services**", the "**Browse/Drag & drop files**" button will appear. From there, select the correct pdf. file(s) containing the scanned images that matches the entity entered. (*You can drag multiple files at a time, make sure they are the correct documents*). After your document is uploaded; enter the case number(s) for each separate document that will be served for that same entity name you've selected. *****Make sure the correct case numbers are correspondent with the file name you've uploaded*** (*If one of the pdf files you uploaded was incorrect, you can click the symbol under "Actions" and re-upload the correct pdf file*) *****File sizes cannot exceed 25mb*****

10. If you have more than one entity that you wish to serve, **DO NOT** hit submit yet; instead go to the search bar again and type the next entity name you wish to serve and repeat steps 7-9. **NOTE**: *The maximum number of entries you can submit for an "**e-delivery**" job is 50.*


11. After you have typed in all the cases that you wish to serve, you can now hit "**Submit**" at the bottom right hand corner. You will receive a message with a **JobID** number and instructions along with the option to print out a receipt of your submission. *You do not have to have 1 document submitted jobs. You can submit multiple documents under 1 **JobID*** (Make a note of the **JobID** number when you are prepared to serve the documents at our location.) **Note**: You will not have the option to make edits since the documents are submitted electronically. If you notice a mistake with your e-Delivery and would like to make a change, contact the CT site location you will be serving and we will make an exception to allow you to make the corrections.

12. When you arrive at our office, make sure you have your **JobID** number to be further assisted. Once your **JobID** is acknowledged and approved by an intake specialist at our location, you will receive an email confirmation with the date and time it was received, along with whom acknowledged receipt of your documents for your records to keep. (**_You do not have to physically bring the paper documents in!!_**)
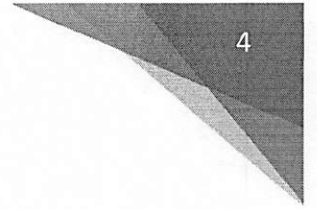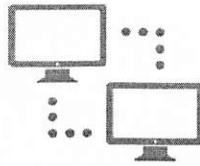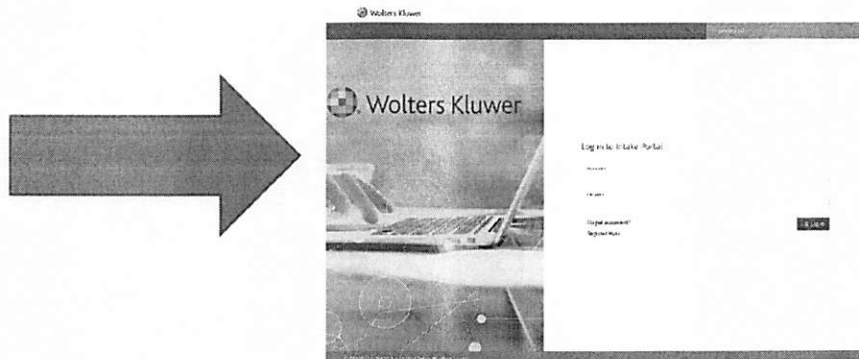
Thank you for properly submitting your documents with us, we appreciate your business!
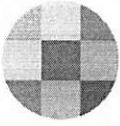
CT Corporation's Intake Portal
Create a Job Guide

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2. If you do not have a pre-existing sign in, please choose "**Register Here**" (*If you already have a log in, skip to step 5*)

3. Begin filling out the registration page with your information. Any field marked with (*) is required in order to complete your registration successfully. (*Please select the State location on where you will be serving your documents to the most. Also take note of the password requirements to successfully create a password that'll enable you to click the* "**Registration**" *button when finished.*)

4. Once registration is complete, you will receive a confirmation detailing that an Admin will verify your request. When your account has been verified, you will receive a confirmation email and then you will be able to successfully log in to begin creating jobs.

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5. Once you've successfully logged in, you will be defaulted to the "**Create Job**" tab. Based on your registration, your information will be prepopulated for the jurisdiction you chose to serve. If you are serving documents in a different location other than the main site you've selected, you have the option to change the jurisdiction for the specific job you are about to create.

6. Next, you will need to select the desired delivery method "**Hand Delivery**" or "**e-Delivery**" (*Hand Delivery*: *Delivery of physical documents in person at CT location along with job entries completed in Portal.* *e-Delivery*: *Upload documents in Portal with job entry details and physically appear to acknowledge delivery and receipt.*) **NOTE*: *Hand Delivery is* **mandatory** *for any document containing a* **hardcopy**; *that includes but is not limited to: checks, cash, any multimedia device, or any form of object that acts as presenting evidence belonging to the documents you will be serving.*

7. In the field "**Entity Name**" is where you will type and search for the entity you wish to serve. (*If the entity you've entered has no match in the database, you will select* "**Add Entity**" *that will appear in the top righthand corner; and manually enter the entity name you wish to serve.*)

8. When you've selected/input the correct entity name you wish to serve, it will appear to the right of the search field bar. From there, click the box under "**No. of Services**" and enter the amount of separate services you will be serving for that specific entity. (**NOT** *number of pages in service.*) **NOTE*: *Once you've selected an entity, the delivery method cannot be changed. If the delivery method is incorrect, please create a new job with the correct delivery method.* *

9. (For **Hand Delivery** proceed to 9a, for **e-delivery** proceed to 9b)

   a. Next to "**No. of Services**", select the box under "**Case Number**" and enter the case number(s) for each separate document for that same entity name you've just selected. (*A case number must be entered in full for every field per document.*)

b. After you've entered the "**No. of Services**", the "**Browse/Drag & drop files**" button will appear. From there, select the correct pdf. file(s) containing the scanned images that matches the entity entered. (*You can drag multiple files at a time, make sure they are the correct documents*). After your document is uploaded; enter the case number(s) for each separate document that will be served for that same entity name you've selected. ***Make sure the correct case numbers are correspondent with the file name you've uploaded**** (*If one of the pdf files you uploaded was incorrect, you can click the symbol under "Actions" and re-upload the correct pdf file*) *__File sizes cannot exceed 25mb__*

10. If you have more than one entity that you wish to serve, **DO NOT** hit submit yet; instead go to the search bar again and type the next entity name you wish to serve and repeat steps 7-9a for **Hand Delivery** or steps 7-9b for **e-Delivery**. **NOTE**: *The maximum number of entries you can submit for an "e-delivery" job is 50.*

11. After you have typed in all the cases that you wish to serve, you can now hit "**Submit**" at the bottom right hand corner. You will receive a message with a **JobID** number and instructions along with the option to print out a receipt of your submission. *You do not have to have 1 document submitted jobs. You can submit multiple documents under 1 **JobID*** (*Make a note of the **JobID** number when you are prepared to serve the documents at our location.*) *If you've submitted a job through "Hand Delivery" and would like to make **additions** to your **pending job**; you can make edits and add additional documents as long as it has not been approved by an Intake Specialist. If you've submitted a job through "e-delivery" you will not have the option to make edits since the documents are submitted electronically. If you notice a mistake with your e-Delivery and would like to make a change, contact the CT site location you will be serving and we will make an exception to allow you to make the corrections.*
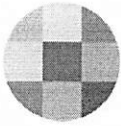
12. When you arrive at our office, make sure you have your **JobID** number to be further assisted. Once your **JobID** is acknowledged and approved by an intake specialist at our location, you will receive an email confirmation with the date and time it was received, along with whom acknowledged receipt of your documents for your records to keep. (*For **Hand Delivery**, you can either write the job number at the top corner of each case or bundle your documents and place a sticky note/printed submission receipt on top of the stack you are dropping off. **Please keep your documents in the same order in which you typed them in.**)*

Thank you for properly submitting your documents with us, we appreciate your business!