EBOOK

Best Practices on How to Avoid Rejected Court Filings

Contents

Introduction

This guide is designed to assist filers in creating compliant electronic documents for the courts using Word (2013 or later) and various Foxit tools, including PDF Editor, PDF Editor+, PDF Compressor, and Rendition Server. While it is particularly beneficial for appellate attorneys, this guide also offers valuable PDF tips for other lawyers practicing in trial courts. (**Note:** Foxit is compatible with Word 2013 or later on Windows and Word 2016 or later on Mac.)

The current technical standard of the United States Courts' Case Management and Electronic Case Filing (CM/ECF) system is PDF or PDF/A. However, the Federal Judiciary plans to transition to the PDF/A standard to enhance the long-term archiving and preservation of case-related documents. Foxit's PDF Editor, PDF Editor+, PDF Compressor, and Rendition Server provide numerous options for converting various formats to PDF/A, ensuring standardization.

Foxit offers a wide range of features through PDF Editor and Editor+ that are ideal for legal professionals, including:

- Unified Document Management
- Streamlined and Automated Redaction
- File Security
- Digital Signatures
- Court-Compliance Features
- Automated 508 Compliance
- Efficient Compression and Conversions

Additionally, Foxit PDF Compressor is a comprehensive solution that addresses the diverse document management needs of legal professionals. It enables users to convert scanned documents into searchable PDF files, reduce file sizes to optimize storage space, and share documents across different platforms.

Foxit's PDF Compressor is also integrated with EMC Captiva, allowing users to create color PDF and PDF/A files that are distinguished by their small file size and high quality. Furthermore, PDF Compressor is packaged with Panasonic scanners, offering higher compression rates than many other options available.
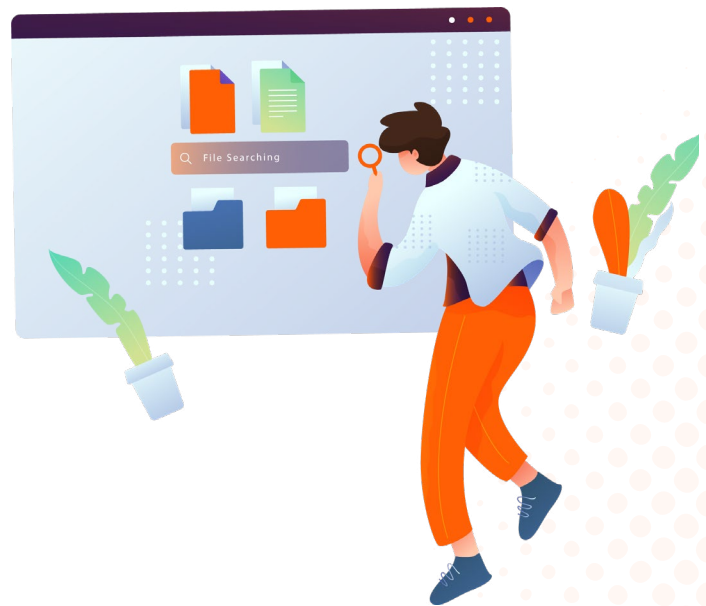
1. Creating Electronic Appellate Briefs, Original Proceedings, Etc.

The proper formatting and submission of electronic documents are crucial for successful filings of appellate briefs and original proceedings. Understanding the PDF and/or PDF/A formats and using the right tools ensures the compliance for electronic filing and streamlines the creation and management of these documents. Pagination is another essential aspect to maintain order and clarity in lengthy documents. Following these basic steps in electronic filing, while adhering to court rules and requirements, are vital for ensuring that submissions are accepted without issue.

A. Format

Before submitting your documents, check the court's website where you are filing to ensure that you meet all formatting requirements and guidelines. Most courts require documents to be submitted in PDF, as this preserves the original layout of the document and ensures consistency in viewing the same file in its intended form. Proper preparation helps you save time and avoid hassle. As per California Rules on e-filing, all documents must have a page size of 8-1/2 by 11 inches.

B. Tools

Word Processor

A word processor is the primary tool for creating electronic briefs or original proceedings. Microsoft Word offers some features to simplify this process. Word's Style feature (see Generating Bookmarks) lets you create headings in your brief that automatically generate bookmarks when you convert the document as a PDF.

Foxit PDF Editor

Foxit PDF Editor sets the standard for creating, combining, editing, redacting and making PDFs searchable. Eventually, you will need to do all these things if you are working with electronic documents in the court system. It functions like a word processor where it allows you to easily reflow text across paragraphs, columns, and pages, change document layout, modify text size, font, or line spacing, and add multimedia.

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C. Basic Steps

1. Save or convert your document from the original word processing document, such as Word, directly to PDF (do not scan the document to create a PDF).
2. Create bookmarks from the Table of Contents.
3. Redact any information that must be redacted under applicable rules. (See section 3 on redaction)
4. Make your document text searchable.

Note: *You may skip step 3 if your document does not contain any information that requires redaction.*

D. Pagination

Before saving/converting the document as a PDF, ensure that the pages are numbered consecutively starting with the cover page of the document, using only the Arabic numerals, 1, 2, 3, with a number on each page. The page number for the cover page may be suppressed and need not appear on the cover page. When a document is filed in both paper form and electronic form, the pagination in both versions must comply with this paragraph.

When a file exceeds 25 MB and requires multiple filing, the first file must include a master chronological and alphabetical index stating the contents for all files. Each file must have a cover page stating (a) the file number for that file and the total number of files for that document, (b) the volumes contained in that file, and (c) the page numbers contained in that file. (For example: File 2 of 4, Volumes 3-4, pp. 301-499.) In addition, each file must be paginated consecutively across all files in the document, including the cover pages for each file. For example, if the first file ends on page 300, the cover of the second file must be page 301.

Note: *Do not use a separate pagination system for tables within the document. Additionally, the page number does not need to appear on the cover page and can be suppressed. (California Rules of Court Rule 8.74 (a) (2))*
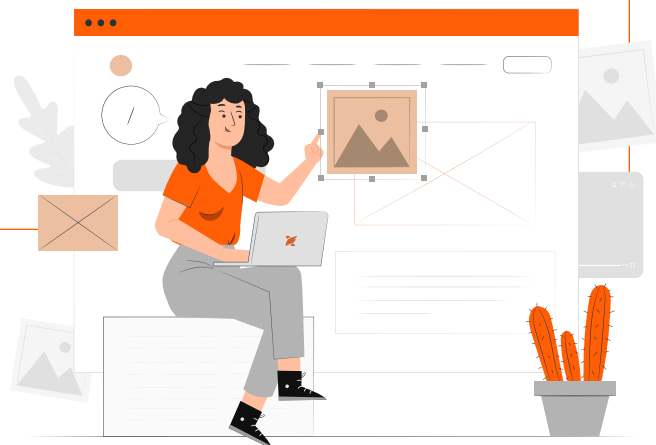
1.1 Saving/Converting Directly to PDF

There are 3 common ways to convert Word into PDF documents:

a. Online Converter

Drag and drop a Word document onto the **Foxit online Word to PDF** converter. Click **Start Conversion**, and then click **Download** your file.

b. Foxit PDF Editor

PDF Editor enables you to create a PDF with one click. Here's how:

- **Drag** the document you want to convert onto the **Foxit PDF Editor** desktop icon.
- If the Foxit PDF Editor is open, simply **Drag and Drop the File** directly into the application window.
- **Right-click** the document icon you want to convert and choose **Convert to PDF** in Foxit PDF Editor.

Your file will now be a PDF that you can share, publish, and even archive easily.

Foxit PDF Editor also allows you to quickly create PDFs right from your clipboard, webpages, blank pages, and templates, with commands in **File > Create** or under the **Convert** tab.

Note: You can convert the entire site or just a portion of it. You can also set options such as timeout and hyperlinks.

c. Save As Location

- If you configure a preferred Save As location, the location you've set will be automatically chosen in the **Save As** dialog box when you're prompted to specify a location to save a document.

Note: You may want to set a cloud storage service if you store documents in the cloud for sharing with a team. Or you might choose your local drive as the preferred Save As location because you're the point person for the file and its contents or the information is confidential.

- To set your preferred Save As location, select **Local Drive** and then click **Browse** to select the location, or input the location in the text box. If you're using a cloud storage system, select **Cloud Storage** and choose the desired cloud service.
- If you set a cloud storage option and then need to remove the Save As location, simply select **Local Drive** and leave the text box blank.
- Each Save As option gives you opportunities to customize how your PDF files are saved and streamline your processes at the same time.

How to Convert Files to PDF/A? (Microsoft Word)

Foxit PDF Editor supports converting general files to PDF/A. There are many ways to save files as PDF/A or convert existing documents to PDF/A.

Converting from Non-PDF Format File:

Users can convert non-pdf format files to PDF/A standards directly by configuring from Foxit PDF Editor printer properties or Foxit PDF Editor Add-in. Using MS Word as an example, follow the steps below:

1. Open the Word file that you wish to convert to PDF/A, press **Ctrl+P/Cmd+P** on your keyboard or go to **File > Print** to open the Print Dialog. Then, select Foxit PDF Editor printer and click on **Printer Properties.**

   Or you may go to the Foxit **PDF** Add-in tab and click on **Advanced**.

2. In the Foxit PDF Editor Printer Properties/Foxit PDF Editor Add-in window, choose the **Setting** tab and click on **Edit**.

3. In the Standard window, choose the **PDF Standards** item. In the compliance Standard dropdown menu, select the specific standards you need, then click **OK** to save it as a setting template and it will show as the Default Settings. Finally, click on **OK** to close Foxit PDF Editor Printer Properties/ Foxit PDF Editor Add-in window.

4. Click on the **Print Icon** to print the word file to PDF/A file. Or if you are using Foxit PDF Editor Add-in, click on **Create PDF** to convert the document.

Converting from PDF to PDF/A

There are **two ways** to convert a general pdf file to PDF/A.

1. Open the PDF file you wish to convert to PDF/A. Go to **File > Save As**. In the **Save as Type** dropdown menu at the bottom of the window, select **PDF/A** and click on **Settings** to choose the corresponding PDF/A standard. Finally, save the file with a new name.

2. Go to **Convert tab>Preflight**, choose the **Standards** tab and check **Save as PDF/A** then click **Continue**.

   Select the specific **Standards** you need and click on **Continue**... to continue and choose **Save As** to save your document as PDF/A with a new file name.

Foxit PDF Editor Ribbon in Word

When you install Foxit PDF Editor, the installer may add Foxit PDF buttons or menu commands to Microsoft Office applications (e.g., Word, Excel, PowerPoint).

The advantage of using Foxit PDF Editor to create a PDF from Word is that it automatically generates bookmarks for your document if you have utilized Word's Styles feature.

1. Choose **Foxit PDF** at the top of the screen (to the right of View).
2. Click **Create PDF** in the menu.
3. In the dialog box that appears, click **Save**.

When printing a hard-copy of a document, be sure to use the PDF file to ensure that the print exactly replicates the e-file version.

Note: *Pagination and sentence structure may change when converting a document to a PDF.*

1.2 Create Bookmarks

Bookmarks are important in legal documents for filing because they help with navigation, organization, and time reduction. Bookmarking is defined as, "A PDF document navigational tool that allows the reader to quickly locate and navigate to a designated point of interest within a document." Each electronic document must include an electronic bookmark to each heading, subheading, and the first page of any component of the document, including any table of contents, table of authorities, petition, verification, memorandum, declaration, certificate of word count, certificate of interested entities or persons, proof of service, exhibit, or attachment. Failure to bookmark your files, such as your exhibits, could result in a rejected filing.

What Should Be Bookmarked:

- **Table of Contents** bookmarked to each referenced section.
- **Electronic Exhibits** with links to the first page of each exhibit
- **Bookmark Titles** that identify the section or exhibit number or letter.
- **Brief Description** in title for exhibits.

Note: Check local rules regarding e-filing for any other specifics about bookmarking.

Bookmarks are helpful for users to mark a place in a PDF file so users can return to it with ease. Or you may like to have your own bookmark structure and new bookmark names. With Foxit PDF Editor, you can easily nest, edit, or delete bookmarks in a PDF file if the security settings allow.

How to Add Bookmarks in Foxit PDF Editor

Simply go to the part of the document where you want a bookmark, click the "new bookmark" icon on the bookmark panel, and voilà.

You can create nested bookmarks (or "sub-bookmarks") simply by dragging a new bookmark directly under another. Save yourself and anyone else reading your PDF document time and frustration by adding this simple feature.

1. Go to the page where you want the bookmark to link to.
2. If there's no bookmark in the document, click **Edit** > **Links** > **Bookmark**, or click the **New Bookmark** icon at the top of the Bookmarks panel.
3. Select the bookmark after which you want to place the new bookmark. If you don't select a bookmark, the new bookmark is automatically added at the end of the bookmark list. Click **Edit > Links > Bookmark** or click the **New Bookmark** icon at the top of the Bookmarks panel, or right-click the selected bookmark and choose **Add Bookmark**.
4. Type or edit the name of the new bookmark, and press **Enter**.

Bookmark Settings

- To maximize the impact of your document, **set** the bookmarks to **open automatically**.
- While the document is open, click **File** > **Preferences** > **Page Display tab**.
- **Click the Navigation tab** dropdown and **select Bookmarks Panel** and **Page**.
- Click **OK**.

Generating Bookmarks

If you use the paragraph styles available in Word to label the headings in your document, when you use the built-in Foxit PDF ribbon to generate your PDF, your document will already include bookmarks to the headings in your document.

Manually Adding Bookmarks

To manually add a bookmark in Foxit PDF Editor, follow these steps:

- Click on the page where you want to create a bookmark.
- Click the **New Bookmark** icon in the **Bookmarks Panel** or select **CTRL** and **B** keys simultaneously.
- In the text of the new bookmark, type the name or label that you want to give the bookmark.

OR

- Highlight the text on the page you want to bookmark, then press the **CTRL** and **B** simultaneously.
- The bookmark will appear in the panel and the name will be the same as the text you highlighted.

Editing Bookmarks

To delete a bookmark, **Select** the bookmark and press the **Delete** key.

To **Edit** the name of a bookmark, **Double Click** on the bookmark.

Once the bookmark text is highlighted, you can edit the text of the bookmark. Press **Enter** when you are satisfied with the results.

Note: *Avoid using names like Header A, Header B, etc. Instead, try something like Statement of the Case, Conclusion.*

Moving Bookmarks

To move bookmarks up and down in the Bookmarks panel, **Left click** and **Hold the text** and **Drag the bookmark** to the desired location in the **Bookmarks** panel. Once the arrow and dotted line are in the new location, release the left mouse button to drop the bookmark in its new location.

Nesting Bookmarks

Bookmarks can also be nested underneath other bookmarks to create a tiered structure of bookmarks.

To nest a bookmark underneath another bookmark, move the bookmark as described above. But this time, move the bookmark underneath the primary bookmark where you want it nested. In other words, select the bookmark by **Left Clicking and Holding the Mouse Button Down**. Then move it up and to the right without releasing the mouse button. Release the mouse button **Once the Bookmark Appears to Be Indented**.

Clicking on the **Minus Sign** next to the bookmark collapses these bookmarks so that they are not visible. A plus sign then appears next to the bookmark, which will expand the nested bookmarks and make them visible again.

1.3 Redacting

Redaction is the process used to prepare a document by removing confidential information before it can be shared publicly or to a third party. In filing cases, redaction is important in legal documents because it ensures client confidentiality, protects sensitive information, and complies with the mandate laid down by laws such as the Federal Rules of Civil Procedure Rule 5.2 Privacy Protection For Filings Made with the Court (a) Redacted Filings and Federal Rules of Criminal Procedure Rule 49.1 Privacy Protection For Filings Made with the Court. The responsibility for redacting personal identifiers rests solely on the filer/counsel as well as the parties.

Both rules require the following details to be removed from court filings for the protection of individual privacy:
- Social Security Number and taxpayer-identification numbers: Use only the LAST FOUR DIGITS.
- Dates of Birth: Only the year of birth can be left if necessary.
- Names of Minor Children: In the case of minor children, only initials are permitted.
- Home Address: Only if a home address must be included, use only the city and state.
- Financial Account Numbers: Identify the name or type of account and the financial institution where maintained but use only the account number's last four digits.
- Follow any additional court orders about the redaction of sensitive information based on the case.
- Use extreme caution and redact for security when including any of the following information:
  1. Driver's License Numbers
  2. Medical Records
  3. Employment History
  4. Individual Financial Information
  5. Proprietary or Trade Secret Details

Redacting Using Foxit PDF Editor

There are four different methods you can use to easily and effectively protect sensitive information or personal identifiers when using Foxit PDF Editor:

a. The Whiteout Feature

Whiteout is a one-click method that erases the content you select and changes the area to a white background. It eliminates the data, metadata, and structural content where the tool was applied, rendering it unretrievable.

Foxit PDF Editor provides the Whiteout feature to enable you to erase information with one click to speed up your workflow.

To remove content from your PDF with the **Whiteout** command, do the following:
- Choose **Protect > Redaction > Whiteout.**
The cursor changes into a cross.
- Click and drag a rectangle around the content you want to remove.
- Click **OK** in the prompt warning you that the "Whiteout" cannot be undone. You can click **Don't ask again** in the prompt so that you won't be bothered the next time you usethe feature.

Now you can see the selected content is removed and replaced with the white background.

b. The Mark for Redaction Feature

Mark for Redaction eliminates the text and images you select but also provides you with additional capabilities in the **Properties** menu and to Search and Redact based on patterns. Redaction requires two steps: selecting (marking) the content for redaction and applying it. This enables you to review the content and be sure you want to redact it before you commit to it.

With Foxit PDF Editor+, redaction is a simple two-phase process that lets you first mark the text or graphics for Redaction and then apply the redaction.

1. Mark the texts and graphics

To mark text or graphics for redaction, select **Protect** > **Redaction** > **Mark for Redaction** > **Text & Images,** and the Hand command changes into a cross icon automatically. Then do any the following to mark the content:

- Drag a rectangle where you want to add redaction. This method allows you to select and mark both text and images at the same time.
- Double-click an image to mark an entire image.
- Hover the pointer over the text. When the pointer changes into a cross, click and drag to select the text you want to redact.
- Right-click the redaction box and choose **Properties** and choose options such as redaction fill color, overlay text, and redaction codes

To mark pages for redaction, please select **Protect** > **Redaction** > **Mark for Redaction** > **Pages** and choose the page range you want to add redaction to. In the **Extract** menu you can choose even or odd pages from the page range to add redaction to.

The marked content or page will be filled with black color in a red rectangle. You can move and resize the rectangle before you apply the redaction.

c. Search and Redact Feature

You can find and remove content either in a single PDF file or in multiple PDF files under a specified folder that contain searchable text with the **Search & Redact Command**.

1. Select **Protect** > **Mark for Redaction** > **Search and Redact** or simply click the **Search** or **Replace** icons in the upper right corner of the application window and
   choose **Search & Redact**. To then specify what you want to redact in the Search panel, perform one of the following:
   - To search and redact an exact word or phrase, select **Match Exact Word or Phrase** and type the text you wish to find and redact into the search dialogue box.
   - You can search and redact multiple words or phrases at the same time. Select **Multiple Words or Phrase** and click **Select Words**…. In the pop-up dialog box, enter the word or phrase you want to search and redact, and click **Add**. Repeat until you add all the words/phrases you want to search for. Or you can click **Import** to import a text file with the list of words or phrases to search for. For the words you have added, click **Export** to export them to a text file.
   - To search and redact a predefined redaction profile, select **Redaction Profiles** and then select an existing redaction profile you want to use.
   - To search and redact patterns (such as phone numbers and credit card numbers), select **Looks like search pattern**. Then select the pattern you want to search from the **Select Your pPattern** drop-down list and choose the specific country or region from the **Country/Region** drop-down list.
2. Click **Search**.
3. Check the results you want to redact and choose **Mark Whole Word(s) for Redaction** to mark all characters

of the word(s) you search or choose **Mark Partial Word(s)** for redaction to mark the specified characters of the word(s). If you choose **Mark Partial Word(s) for Redaction**, the Settings dialog box pops up and allows you to specify the characters you want to mark. To change your character settings, click the **Settings** button in the Search panel.

4. Click the button **Mark Checked Results** for Redaction at the bottom of the search dialogue box.
5. Click the **Apply Redactions** button. Or Choose **Protect** > **Mark for Redaction** > **Apply Redactions**.

Note: This operation cannot be undone, and the selected content will be removed permanently when you select **Apply***. It is recommended that you save a backup copy of this document before you apply the redaction.*

d. Smart Redact (AI-based Document Redaction) (Included with Foxit PDF Editor+)

Smart Redact provides a simple, efficient, and comprehensive method to assist legal professionals in dealing with sensitive information from the (PDF) documents. It helps users who need to redact sensitive information in PDF but don't know the exact words to redact in advance. With Smart Redact, users don't have to read through every page to find sensitive information in each sentence, potentially missing pertinent sensitive data. Instead, Smart Redact lists all sensitive data in PDF files in seconds with a single click.

For users with a large volume of documents to redact, the **Batch Redact** function allows users to redact multiple documents at the same time.

The **Smart Redact Plugin** provides a powerful AI based redaction capability for users to redact sensitive information in PDFs while they are in the same PDF editor executing their typical document workflows.

Preparing Your Document with Smart Redact

1. **Upload Your Document:** Import your document into Foxit PDF Editor+.
2. **Identify Sensitive Information:** Let Smart Redact scan and identify sensitive information, such as personal names, addresses, financial data, and more.
3. **Review and Confirm:** Carefully review the suggested redactions to ensure accuracy. The AI's suggestions can be refined as needed.
4. **Apply Redactions:** With a simple click, Smart Redact applies the redactions, ensuring that sensitive content is removed from the document.

By starting your workflow with Smart Redact, you establish a solid data privacy foundation, ensuring that sensitive information is effectively masked.

In all the above-mentioned features, redaction is completely secure, removing the original text or image permanently from the document. No one can hover over the area to copy and paste because redacted content is permanently removed and cannot be reversed.

Generate Redacted and RMS-protected PDFs

Foxit PDF Editor+ allows users to generate a redacted and AIP-protected PDF from an existing PDF. Authorized users are granted access to view the full document while unauthorized users are only able to view the redacted document, which allows for improved knowledge sharing of non-sensitive information within a protected document.

To Generate a Redacted and AIP-Protected PDF, Please Do the Following:

- Mark the content for redaction.
- **Click Protect > Protect Redactions**, log on your AIP server and then choose an AIP template to encrypt the document.
- Then the document with redaction protected by the AIP template is generated and opened with a message box appearing in the document area. **Click View** the full content to view document's content without redaction. This message box appears only when the document is opened by the document owner.
- After clicking View the full content, two messages will appear in the message box. **Click Redacted Mode** to exit the full content mode and return to the document with redaction. **Click View Permission** to view the security properties of the document.

When the authorized users open this protected document, only the message to view permissions appears in the message box.

1.4 Bates Numbering

Bates numbering is used in the legal field to assign identifying numbers and date/time stamps to images and documents. It provides a unique serial number for every page of a collected document and serves as a method for indexing legal documents for easy identification and retrieval. Bates numbering is primarily utilized in litigation and discovery to facilitate the identification of numbers, dates, and timestamps on images and documents. This process ensures that no page is missed or misplaced, which is especially critical in legal proceedings where precision and accuracy are paramount.

Foxit PDF Editor enables users to customize Bates numbering schemes by selecting the number of digits, prefix, suffix, and location, as well as including numbering in the header or footer. Users can also select multiple files or folders to apply bulk Bates numbering, streamlining digital document indexing and retrieval for law firms of all sizes.

How to Add Bates Numbering

This feature is available in both **Foxit PDF Editor and PDF Editor+**

1. Choose **Organize > Bates Numbering > Add.**

2. In the **Add Bates Numbering dialog box, add files** (from local drives or ECM), folders, or opened files by **clicking Add Files, Add Folders or Add Open Files.**

Tip: You can also add files by directly dragging and dropping them to the box.

3. (Optional) In the files list, you can **change the order** in which Bates numbers are assigned. You can **reorder** the files by Name/Location/Size/Modified Time simply by **clicking the corresponding column name.** Alternatively, **reorder** the files **manually** as desired by c**licking the Move Up/Down button**, or by dragging and dropping the file in the list. **Select a file** and **click the Remove button** to delete it, if necessary.

4. **Click Output Options** to **set the target output folder, name the file and create the log file in the dialogue box. Click OK to exit** the box after completing these settings.

Tip: When naming output files, if you select **Add to original file names**, you can enter the string "**%BATES_ NUMBER_KEY%**" in the **Insert Before** or **Insert After** boxes to add the range of Bates number to the filenames (e.g., "0001-0020[original document name].pdf").

5. **Click OK** and a dialog box to **add Headers and Footers** will pop up for you to insert Bates Numbering on the PDF documents.

6. **Select Bates Number** in the Macro menu, and then **click Insert.**

7. **Another dialog box will appear** for setting the number of digits (any number from 3 to 15), the increment, the start number, rotate angle and the prefix/suffix, if needed.

Tip: Setting the value of the increment to a negative number reverses the order of the Bates numbering.)

8. **Click OK to finalize** the setting.

1.5 Searchable Text

According to California Rules of Court 8.74 and California Rules of Civil Procedure Rule 2.256: Electronic documents must be in text-searchable portable document format (PDF) while maintaining the original document formatting. The document must be text searchable when technologically feasible without impairment of the document's image.

To make a PDF document text-searchable for case filing, you can use Foxit's Optical Character Recognition (OCR) solution or Foxit PDF Editor. OCR is a process that enables images or printed text to be translated into machine-readable text. OCR is most commonly used when scanning paper documents to create electronic copies but can also be performed on existing electronic documents (e.g. PDF or PDF portfolio).

Steps to Recognize Text

Foxit PDF Editor can detect whether a PDF file is scanned or image-based and make corresponding suggestions to initiate OCR when opening a scanned or image-based PDF. You can also run OCR anytime to recognize the image-based text in a PDF.

To recognize image-based or scanned text in a PDF file, perform the following steps:

1. Click **Convert** > **Recognize Text** > **Current File**, in the Recognize Text dialog box, specify the page range you need.

2. Choose the language used in your document. You can select multiple languages as well.
3. In the output type, check **Searchable Text Image** to make the image text selectable and searchable (or check **Editable Text** to enable the image text to be edited with Foxit PDF Editor). Then click **OK** to recognize the text.

Searchable Text Image:

During the OCR process, Foxit PDF Editor analyzes the image text and substitutes words/characters that closely approximate the image text. The substitute words/characters will be placed on an invisible layer of text in the PDF, which makes the image text selectable and searchable. If the substitution is uncertain, the text will be marked as OCR suspects which need to be corrected manually. Image text can be extracted from a PDF and saved as a .txt file.

To Enable OCR:

1. Open Foxit PDF Editor and go to **File** > **Open**. Find the PDF you want to implement OCR in, **Select** it, and click **Open**.
2. Go to **Tools** > **Image Recognition OCR.** The Image Recognition OCR dialog box appears.
3. In the **Language** drop-down list, **Select the Language of the Text** in your PDF.
4. In the **Output Options** section, you can choose to output the recognized text to a new file, or to have it overlay the original image text in the PDF.
5. Click **Start**. Foxit PDF Editor will begin the OCR process. A progress bar will appear, showing you the status of the OCR process.

When the OCR process is complete, you can close the **Image Recognition OCR Dialog Box**. The text in your PDF should now be selectable and searchable. If there are any errors in the OCR process, they will be marked as OCR suspects. You can correct these errors by going to **Tools > Correct Suspects**.

For mass quantities of scanned documents, PDF Compressor provides optimal OCR capabilities with back-end server technology.

1.6 Fixing Mistakes in Foxit PDF Editor

Mistakes or typographical errors can occur while drafting electronic briefs and other case documents. Fortunately, you can easily fix simple typographical errors using Foxit PDF Editor.

The **Edit Text Tool** allows you to erase and type in a PDF as if it were a word processing document. Foxit PDF Editor automatically recognizes the font type and size, enabling you to backspace to remove text and retype as needed, all while maintaining font and sizing consistency.

Select **Edit Ribbon > Edit Text**. Then place your cursor where you want to edit and type as you would with a word processor. If you used an uncommon font, the newly typed text will be replaced with another font available in Foxit PDF Editor.

Reflow Editing Command

Reflow editing mode is a text editing mode in **Foxit PDF Editor Pro**. The reflow editing feature provides a fluent text editing experience similar to editing texts in MS word application. The commands **Edit Text** and **Edit Object** can only allow you to edit text in one text block in one page. To edit text in a continuous mode like Word, you can use the **Reflow Editing** command. When you are in reflow editing mode, text will reflow automatically in pages in the document as you add or edit text content.

To Edit Texts Under Reflow Editing Mode, Please Do the Following:

1. Choose the Edit tab in Foxit PDF Editor> **Reflow Editing**, and a dialog box pops up to inform you about the benefits and notes about the reflow editing mode. Click **Continue** if you need to edit content in the Reflow Editing mode.

2. The **Format** tab appears in the right panel, allowing you to edit text format and paragraph styles.

3. Sometimes there are text blocks surrounded by pink outer borders; these text blocks are called floating objects. To edit floating objects under reflow editing mode, **double click on one of the specified floating objects** to enter its interior for editing, the bottom of floating object would flow down/up as you add or delete texts in it. When you need to move a floating object to another location in the PDF page, please **single click the floating object**, then drag and move the selected floating object to any location you want in the PDF page.

4. When you complete editing, click **Apply Changes** to save the changes or click **Exit Reflow Editing** to exit the Reflow Editing mode without applying any change.

Note: *In Reflowing Editing mode:*

- Comments and form data cannot be edited.
- Items in the magenta rectangle will not be affected by content reflow.
- Some properties of PDF contents may be removed.
- Some actions may take longer to process and additional information may be added.

To make editing easier, Foxit PDF Editor supports linking multiple text blocks together or connecting separate text blocks into one single paragraph. You can link text blocks not only in one page but also across multiple pages. Text will reflow in these linked blocks and will not cover the page contents that are located among these blocks.

To link text blocks, please do the following:

- Click **Edit > Link & Join Text** and the **Join & Split** context tab appears on the ribbon. Select text blocks you need to link together and the selected blocks will be marked with numbers as you click them.

- Click the **Link** command in the **Join** & **Split context tab**, or **right-click the selected blocks** and choose **Link Text Boxes**. This will link the selected blocks together.

  *Note: Once you add or edit text in these blocks with the **Edit Text** command , the text will reflow in these linked blocks and will not cover the image among them. And when the text added exceeds the final block, content following the linked blocks will be covered because they have not been linked together.*

- To unlink a text block, please click **Edit > Link & Join Text,** select the text block you need to unlink and then click the **Unlink** command in the **Join & Split** context tab. You can also right-click the selected block and choose **Unlink Text Blocks**.

Spellchecking

As with any writing scenario, but particularly in the legal field, running a thorough spellcheck before completing or sharing a document is essential. Foxit PDF Editor offers all standard required spellcheck components legal professionals rely on.

- **Ignore** – Select **Ignore** if no correction is needed.
- **Ignore All –** Select **Ignore All** to skip all further occurrences of any current misspellings.
- **Change** – Select **Change** after selecting one suggestion to make the suggested correction.
- **Add To Dictionary** – Select **Add to Dictionary** if the suspected word is spelled correctly but doesn't appear in Foxit PDF Editor's dictionary. Choosing Add to Dictionary adds the word to your personal Foxit PDF Editor dictionary, which is a supplemental list of correctly spelled words used to proofread a document.
- **Cancel** – Select **Cancel** to exit the Check Spelling dialog box.

Tip: You can add, remove, or reorder dictionaries in **File > Preferences > Spelling.**

1.7 Replacing Pages

If the mistake cannot be fixed with the Edit Text tool, you may be able to fix the error by deleting the offending page and replacing it with a corrected page. To replace a page, **first fix the mistake** in your word processing program. Then, **Convert** the corrected word processing document to PDF. Now, **Extract** the corrected page from your corrected PDF and **Save** it as a separate PDF document. Then, **Delete** the page with the error from your original PDF and **Insert** the corrected page into the proper place in the original PDF.

Replace Pages (Foxit PDF Editor)

You can easily replace an entire PDF page with another PDF page using Foxit PDF Editor.

- Click **Organize** > **Replace**, or right-click a page thumbnail in the Pages panel or Thumbnails window and choose **Replace Pages**.
- Select the PDF document containing the replacement pages from your local device by navigating through your local disk or from ECM systems and cloud services by selecting **Open from ECM** and click **Open**.
- In the pop-up **Replace Pages** dialog box, do the following:
- In the **Original** group, specify the page range to be replaced in the original document.
- In the **Replacement** group: Specify the replacement page range. You can also click **Browse** to change the selected file.
- Click **OK**.

If you need to replace a page in your PDF file, simply use the **Replace Page** option. With this option, you can update a single page simply by replacing it with your updated page in one step. The text, images and comments on the original page will be replaced without the need for any further action.
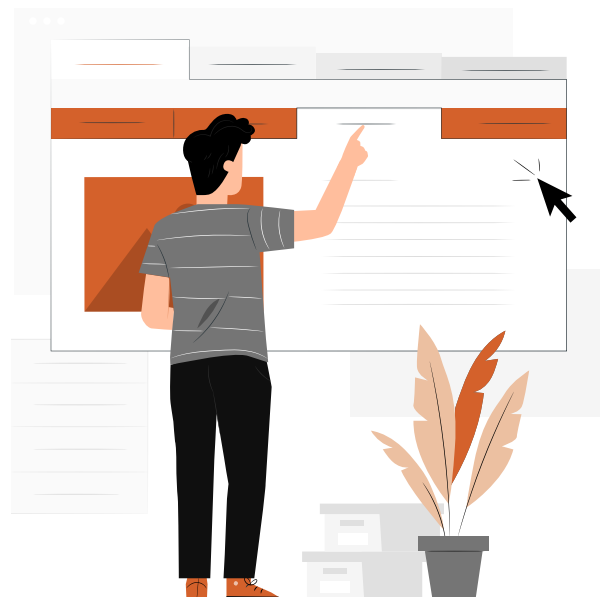
1.8 Combine Individual Files Into One PDF File

To combine individual files into a single PDF document, simply follow these steps:

Within a Document in Foxit PDF Editor

- Choose **Convert Ribbon > Combine Files**.

OR

From the File Menu in Foxit PDF Editor

- Choose **File > Create > Combine Files**.
- In the dialog box, add the individual files or folders that you want to combine into a single PDF. The files can be of any format supported by Foxit PDF Editor (DOCX, PDF, XML, JPG, PNG. TIF, etc.).
- Arrange the files in the order that you want to combine them.
- Save and name the combined document

Using Foxit PDF Editor for Merging PDF files on Windows

Foxit PDF Editor also offers robust features for manipulating PDF documents, including merging multiple files. Follow these steps to create a merged file:

1. **Launch PDF Editor.**
2. **Combine Files:**
   - Go to **File** in the top left corner.
   - Select **Create** and then choose **Combine Files**.
   - Add the files you want to merge by clicking **Add Files**.
3. **Arrange and Merge:**
   - Arrange the files in the desired order by dragging and dropping.
   - Click on the 'Combine' button to merge the PDFs into a single document.
4. **Save the Merged PDF:**
   - After the merging process is complete, save the combined file to your preferred location.

Combine PDF files online using your Windows device with our online PDF merger tool

Follow these steps to merge multiple PDFs together into one document:

1. Drag your PDF files onto the **Online PDF Combiner**. You will see the files that you have added under this free tool.
2. Click the up and down arrows to reorder files. Or click on the **Trash** button to remove a particular file.
3. To combine PDFs online, click **Start Now**.
4. When the file is merged, a dialog box will appear. You can then download it.

1.9 File Size

E-filing case file limitations may vary by court. Most courts require 25 megabytes per PDF document and 35 megabytes per envelope. Some courts also have a 50 MB cap for a single file. (**Note:** California Courts require 25 MB per file size). If a document exceeds the 25-megabyte file-size limitation, the electronic filer must submit the document in more than one file, with each file 25 megabytes or less. When an electronic filer wants to submit a document that has more than 10 files, or if the document cannot be filed in multiple parts, or if filing it electronically would be too difficult, the filer must submit the document manually. This means filing it to the court on an electronic medium like a flash drive, DVD, or compact disc (CD).

Make sure to check all rules with the court you are filing with to make sure you have met all their requirements and local rules for electronic documents.

Use Foxit PDF Editor's PDF Optimizer to Reduce File Size

With **PDF Optimizer,** you can reduce file size by compressing content, un-embedding fonts, and removing any redundancy in the data of PDF objects.

> PDF Optimizer offers several settings options, but the defaults are appropriate for many PDF documents. If you want to reduce the file size quickly using default settings, follow these steps:
>
> 1. Choose **File** > **PDF Optimizer** > **Reduce File Size**.
> 2. Select **Current File** to apply the settings. A dialog box pops up. Choose **Retain Existing** to keep the current version of PDF or select a desired version from the dropdown menu. Then choose the compression effect that you need. Click **OK**.
> 3. In the dialog box that appears, specify the file's name and the location where you want to save it. Click **Save** to begin optimization.

It's important to note that compressing a PDF can also affect the quality. Be sure to compare the original file with the compressed version to ensure it meets your requirements.

Use the PDF Optimizer in Foxit PDF Editor to Control What Gets Reduced

Foxit PDF Editor's **PDF Optimizer** lets you easily see what's getting compressed in your PDF document. With this feature, you can compress images, remove data redundancy of PDF objects, and update your PDFs.

> Here's how to use it:
>
> 1. Choose **File** > **PDF Optimizer** > **Advanced Optimization** > **Advanced Optimization**.
> 2. Set the properties in the PDF Optimizer dialogue box.
> 3. Click **Audit space usage** to see how big the current PDF file is and determine which items you need to optimize.
>
> It's a great way to get more granular and gain more control when you compress a PDF.

Note: *To optimize PDFs created from scanned documents, Foxit PDF Compressor provides the following file size reductions:*

- black/white = up to 1/10th of the original
- color scans = up to 1/100th of the original

Make sure to check the rules with the court you are in regarding whether color scans are allowed.

2. Creating Electronic Appellate Record On Appeal/Exhibits/Attachments

Appendices must comply with California Rules of Court, rule 8.124, including chronological and alphabetical indices. For Exhibits, see rule 8.486(b). When possible, use PDF files that are converted from native formats, rather than scanned documents. (See Saving/Converting directly to PDF.) Counsel or parties should cooperate in providing electronic copies of documents when requested and should check the local rules of the court where they will be filing to make sure all requirements for electronic documents have been met. This section provides the basic requirements and important points to remember in creating appendices, exhibits, and attachments.

1. Chronological Index

The chronological and alphabetical index should be converted from the word processing program used to create them. Where appendices or exhibits are submitted in multi-part electronic files, the first file must include a master chronological and alphabetical index stating the contents for all files. Each separate file should have a cover page stating (a) the file number for that file and the total number of files for that document, (b) the volumes contained in that file, and (c) the page numbers contained in that file, e.g. File 2 of V. Volumes 3-4, pp. 301-499.

2. Pagination

Make sure to number the pages consecutively beginning with the cover page of the document, using only the Arabic numbering system, as in 1, 2, 3. Every page must have a number. Do not use a separate pagination system for chronological or alphabetical indexes within the document. The page number does not need to appear on the cover page. See Pagination in Section I. for more information.

3. Scanning Documents

Although you are prohibited from scanning your documents that are available in electronic format (e.g. cases, statutes, etc.), there are occasions where you will need to scan a document to include it in your appendix.

For example, a trial court may not have electronic filing so you may have to scan a trial court order. Or you would like to include a contract in your appendix, and it is only available in paper form. In those situations, the only solution is to scan the document.

You can create a PDF file directly from your scanner using Foxit PDF Editor or other software. When scanning, make sure that the scanner settings are:

• 300 dots per inch (dpi)
• Black and white (not gray scale or color, unless scanning an image)
• OCR (optical character recognition)

A one-hundred-page scanned document (that does not include images) with these settings should be about 3.5 megabytes in size. (**Note:** *File size may vary with certain documents.)* If scanning is creating files that are too large, check the settings on your scanner. Most copiers, have a menu that allows the scanner settings to be adjusted. If you have already adjusted the scanner settings, and the file size is still too large, Foxit PDF Editor can help with that in the next section.

Note: *Make sure to do this before bookmarking the appendix.*

4. Scanning with Foxit PDF Editor

If you have a scanner connected to your computer, you can scan documents using Foxit PDF Editor.
Follow these steps:

* Insert the document into your scanner
* Open Foxit PDF Editor
* In Foxit PDF Editor choose **Convert ribbon > From Scanner**
* Choose Black and White in Color Mode

To scan a paper document to PDF using Foxit PDF Editor at higher DPI, Choose **File** > **Create** > **From Scanner** > the **From Scanner** button, or choose **Convert** > **Create** > **From Scanner**, or choose the **Home** tab > the **From Scanner.**

Select a scanner, uncheck **Configure scanner using scanner's interface** then click on the drop-down menu next to **Resolution** to change the DPI setting there. Then uncheck **Reduce size and optimize**.

You may also check **Configure scanner using scanner's interface** then uncheck **Reduce size and optimize** and directly use the scanner interface to scan, then change the DPI setting from the scanner's user interface.

Resolution DPI Options:
* For screen display (150DPI - 300DPI).
* For document OCR (300DPI - 600DPI).
* For photo print (600DPI or up).

Reduce size and optimize:
The Optimization Options dialog box for image settings controls how scanned images are compressed for the PDF. Default settings are suitable for a wide range of document pages, but you may want to customize settings for higher quality images and smaller file sizes.

Tip: Scanning at 300 DPI produces the best text for conversion. At 150 DPI, OCR accuracy is slightly lower. At 600 dpi, both scanning and processing are slower than it is at 300 DPI.

You can also perform OCR on an image by dragging and dropping it onto Foxit PDF Editor. Foxit PDF Editor will convert the image file into a PDF document and advise you that you can run text recognition to make it searchable or editable.

5. Scanning with PDF Compressor (Guide Images Not Included)

The PDF Compressor compresses and converts scanned documents to PDF or PDF/A. The outstanding document compression provided by the PDF Compressor greatly reduces file sizes while ensuring prime document quality in an ISO standard compliant format suitable for long-term archiving.

- Open PDF Compressor.
- Drag and drop a file or a folder onto the list window to add entries to the list.
- Double-click the corresponding entry within the list or right-click the entry and choose Properties to edit the properties such as the job priority, input and output options, OCR, etc.
- After configuration, select the entry you want to start and **Click the Start Button** on the toolbar to run the job.

6. Create Bookmarks for All Documents Contained in the Appendix

A bookmark is a text link that appears in the Bookmarks Panel of Foxit PDF Editor. Some courts require bookmarks for each document that is listed in the index. Each electronic bookmark must briefly describe the item to which it is linked. For example, an electronic bookmark to a heading must provide the text of the heading, and an electronic bookmark to an exhibit or attachment must include the letter or number of the exhibit or attachment and a brief description of the exhibit or attachment. An electronic appendix must include bookmarks to the indexes as well as to the first page of each separate exhibit or attachment. Exhibits or attachments within an exhibit must also be bookmarked.

Be sure to check the local rules of the court you are filing with to make sure you have met all requirements for electronic appendices. For documents without titles, be sure to use descriptive labels for your bookmarks. See Create Bookmarks in Section I. above for the steps in bookmarking.

7. Redacting

Protection of sensitive information: Electronic filers must comply with rules 1.201, 8.45, 8.46, 8.47, and 8.401 regarding the protection of sensitive information, except for those requirements exclusively applicable to paper form (rule 8.74 California Rules of Court). Redaction is crucial in the electronic filing of cases in the United States as it protects sensitive information, such as Social Security numbers and financial data, ensuring compliance with legal requirements and maintaining confidentiality. By removing personal identifiers, redaction helps prevent identity theft, facilitates fair trials by limiting prejudicial information, and streamlines legal processes, ultimately enhancing digital security and preserving the integrity of the legal system.

See Redacting in Section I above for the steps in redaction.

8. Text Searchable

Court Rules reiterate that electronic documents must be text in text-searchable portable document format (PDF) while maintaining the original document formatting. Text searchability allows quick access to specific information, especially in lengthy legal documents.

See Text Searchable in Section I above to see the steps in ensuring that your file is text searchable.

9. File Size

When an electronic filer wants to submit a document that has more than 10 files, or if the document cannot be filed in multiple parts, or if filing it electronically would be too difficult, the filer must submit the document manually. This means filing it to the court on an electronic medium like a flash drive, DVD, or compact disc (CD).

See File Size in Section I for the steps in reducing file size.

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3. Common Mistakes With E-Filing

While e-filing offers convenience and efficiency, it also comes with its own set of challenges. This section highlights common mistakes that filers often make when submitting documents electronically and how they can be corrected. From file size limitations to improper formatting, understanding these errors can help ensure a smoother filing experience. Common errors in documents e-filed include:
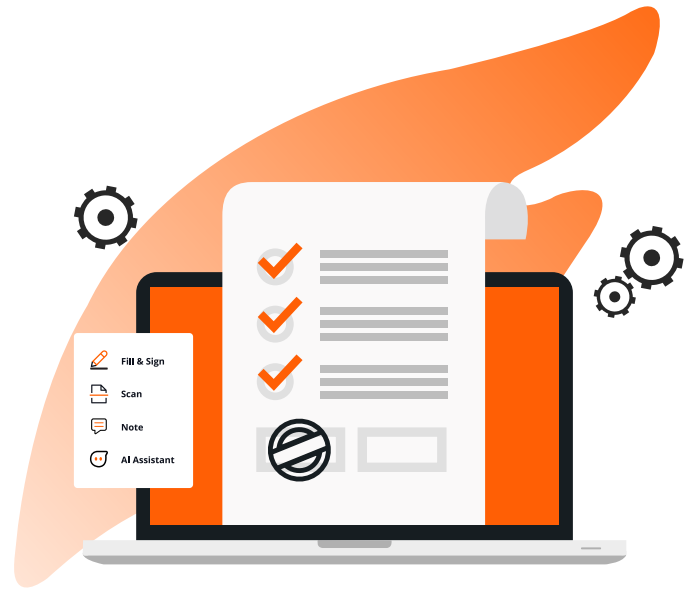
1. Conflicts With E-Filing Header

If the text on the PDF document overlaps with the e-filing header, an easy way to solve the problem is to organize headers using the **Header & Footer features** in Foxit PDF Editor.

- Open the PDF document with Foxit PDF Editor.
- Choose **Organize > Header & Footer > Remove All**.

If your PDF is a scanned document, you can complete OCR steps first and then use the **Edit** features in Foxit PDF Editor to organize headers.

- Open the scanned document with Foxit PDF Editor.
- Go to **Convert > Recognize Text > Current File**. Choose the page range, language and output type, and **click OK** to apply.
- Go to **Edit > Edit Object > Text**.
- Drag a box across the header that you want to remove and **click the Delete key** on your keyboard.
- After merging the documents, you can apply the e-filing header to all pages by choosing **Organize > Header & Footer > Update**. Choose **Page Range Options** to specify the page range

2. Skewed Documents

Often, scanned exhibits saved to PDF are skewed. The Deskew option is under **File> PDF Optimizer >Optimize Scanned PDF**. Also, you may turn on Deskew via **File->Create>From Scanner>Optimize Scanned PDF**. You can additionally apply OCR to all documents to make them text-searchable PDFs from this same dialog box.

To deskew a pdf page, you can use these two workarounds.
While creating a PDF file with your scanner, the deskew option has been enabled by default.
If you'd like to deskew the created pdf file, please open your file in Foxit, go to **File**>**Optimize Scanned PDF**, set the option Deskew to **On** to enable it, then click on **OK**.

3. Rotated Pages

Many e-filing systems require PDF documents to be submitted in portrait mode. But sometimes scanned images may result in rotated pages. When this happens, you may simply click the Organize tab and choose Rotate Pages to select which way to rotate pages.

Rotate Pages

- Click **Organize**.
- Do one of the following:
    - Select the page that you want to rotate and click **Rotate Pages** > **Left** or **Right** in the **Organize** tab to rotate it clockwise or counterclockwise.
    - Right-click a page thumbnail in the Pages and Thumbnails window and choose **Rotate Pages** > **Left** or **Right**.
    - Move your mouse over the page which you want to rotate and click which direction in which you would like to rotate, clockwise or counterclockwise.

Tips:

1. Press **Command/Shift** + click to select multiple page thumbnails at one time. If you want to select all the page thumbnails, select a single page thumbnail first, and then press **Command** + **A**.
2. The rotate buttons floating over a page thumbnail are available in Thumbnail View when you only select a single page thumbnail.

Rotate Manually

The scanned page is an image object normally, so we can rotate the whole page as image object. After open the scanned pdf file, go to Edit>Edit Object>Image, select the whole page, you will get the circular arrow to rotate the page as you need.

Note: *If you cannot see the circular arrow, please ensure that you are in the single mode.*

4. Failure to Redact Sensitive Information

Failure to redact sensitive information is a common mistake when electronically filing a case. Lawyers who fail to protect sensitive information may be sanctioned with fines or penalties by the court.
Foxit Editor+ AI-powered Smart Redact feature is designed automatically to detect and securely redact personal, confidential, or privileged information. This includes social security numbers, banking details, medical records, or any information that needs to be safeguarded. See the Smart Redact section for more information.

Final Thoughts

Electronic court filings can be challenging, but understanding and implementing best practices can significantly reduce the risk of rejections. By carefully adhering to formatting guidelines, ensuring compliance with file size and type requirements, and thoroughly reviewing documents before submission, filers can enhance their chances of successful acceptance. Knowing the latest court rules and leveraging available resources can further streamline the e-filing process. By following these proactive guidelines and using the right tool such as Foxit PDF Editor, legal professionals can save time, reduce frustration, and ensure a smoother process in the court system.