

## The 10-Point Evaluation Checklist for California Law Firms

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Navigating eFiling mandates, process serving, records retrieval,  
and case management in an evolving legal technology landscape.

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California's court system is undergoing the most significant technology transition in its history. The Supreme Court has mandated electronic filing through approved service providers. Los Angeles Superior Court now requires all represented parties to accept electronic service in civil cases. Family law, juvenile dependency, probate, and mental health appeals are all transitioning to mandatory eFiling by mid-2026.

**This means every law firm in California that handles litigation must now choose a litigation support provider. Not someday. Now.**

But choosing the wrong provider creates real problems: rejected filings that miss deadlines, failed service attempts that delay cases, scattered workflows across multiple vendor portals, and costs that creep up with hidden fees. Switching providers mid-case is painful. The decision you make now will likely stick for years.

This guide gives you a structured framework for evaluating litigation support providers. It covers the 10 criteria that matter most, explains what to look for (and what to watch out for), and includes a scoring checklist you can use to compare vendors objectively.

Whether you're a solo practitioner choosing your first eFiling provider or a mid-size firm consolidating vendors, this guide will help you make a confident, informed decision.

<b>85%</b> of litigators now use electronic court filings	<b>77%</b> expect AI to transform litigation support by 2031	<b>32%</b> of firms will increase lit support spending in 2026	<b>\$8.45B</b> litigation support market size (2024)
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Sources: ABA 2024 Tech Report, US Legal Support 2026 Survey, Lighthouse eDiscovery Report

Use these criteria to evaluate any litigation support provider. Each section explains what to look for, what questions to ask, and the red flags that should give you pause.

## 1. SERVICE BREADTH: HOW MANY VENDORS DO YOU NEED?

The most overlooked cost in litigation support is vendor fragmentation. If you use one company for eFiling, another for process serving, a third for records retrieval, and a fourth for skip tracing, you are managing four logins, four billing relationships, four sets of credentials, and four disconnected workflows. Every handoff between vendors is a point where information gets lost, deadlines slip, and costs accumulate.

### What to look for:

- A provider that offers eFiling, process serving, records retrieval, skip tracing, and case management under one roof
- Integrated workflow where filing an action automatically feeds into service of process without re-entering case details
- A single dashboard where you can track every aspect of a case from filing through resolution

### Red flags:

- A provider that only handles one or two services and partners with others for the rest (you lose integration)
  - No case management layer connecting services together
  - Having to re-enter case information when moving from one service to another
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## 2. CALIFORNIA COURT COVERAGE: COUNTY BY COUNTY

Not all eFiling providers cover all California counties. Some are approved in 30 counties, others in 36, others in all 58. If your practice handles cases across multiple counties, gaps in coverage mean you need a backup provider for certain jurisdictions, which defeats the purpose of consolidation.

### What to look for:

- Court-approved Electronic Filing Service Provider (EFSP) status in the counties where you practice most
- Physical filing capability for counties that haven't adopted eFiling or for document types exempt from eFiling mandates
- Awareness of county-specific rules (Los Angeles has different procedures than San Francisco, which differs from Orange County)

- "Which California counties are you approved to eFile in today?"
- "How do you handle filings in counties where you're not an approved EFSP?"
- "What is your filing rejection rate, and how do you handle rejections?"

### 3. PRICING TRANSPARENCY: WHAT WILL YOU ACTUALLY PAY?

Some providers publish clear, per-transaction pricing. Others require you to call for a quote, which usually means the price depends on your negotiating skill and firm size rather than the actual cost of the service. Opaque pricing models create budget unpredictability and make it impossible to compare vendors objectively.

#### What to look for:

- Published per-service pricing on the provider's website (eFiling fee per filing, process serving fee per serve, etc.)
- Clear disclosure of what court fees are included versus passed through
- No hidden surcharges for rush orders, additional pages, technology fees, or account maintenance
- Volume discounts or bundled pricing for firms with predictable monthly volume

#### Red flags:

- "Contact us for pricing" with no published rates
  - Tiered pricing structures where the per-unit cost is unclear until after you commit to a volume tier
  - Separate technology fees, platform fees, or subscription charges on top of per-service fees
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### 4. TECHNOLOGY AND PLATFORM QUALITY

You will use this platform every day. If it is slow, clunky, or requires training to operate, your team will resist adoption and find workarounds that defeat the purpose of the system. The best litigation support platforms feel like consumer-grade software: intuitive, fast, and accessible from any device.

#### What to look for:

- Mobile-accessible platform (attorneys and paralegals need to check case status from court, depositions, and client meetings)
- Real-time order tracking with status updates and notifications
- Secure document storage with case-level organization
- 24/7 platform access (not just business-hours concierge)
- Integration capability with practice management software (Clio, MyCase, PracticePanther, Smokeball)

#### Questions to ask:

- "Can I see a live demo of your platform before committing?"
- "Is your platform accessible on mobile devices without a separate app download?"

- "Do you integrate with my practice management software?"

## 5. PROCESS SERVING CAPABILITIES AND COVERAGE

Service of process is where cases succeed or stall. A provider with a deep network of local servers who know the neighborhoods, gated communities, and business parks in their territory will succeed on the first attempt far more often than a provider routing jobs to whoever is cheapest.

### What to look for:

- Nationwide coverage with emphasis on California-local process servers who know their territory
- GPS-verified service attempts with photo documentation
- Real-time tracking of every attempt (not just final confirmation)
- Integrated skip tracing for when subjects cannot be located at their known address
- Clear turnaround time commitments with escalation procedures for difficult-to-serve subjects

## 6. RECORDS RETRIEVAL EFFICIENCY

Records retrieval is often the most time-consuming aspect of case preparation. Medical records, employment files, financial documents, and institutional records all require different approaches, different custodian relationships, and different timelines. A provider with established custodian relationships will get your records faster than one that is starting from scratch with each request.

### What to look for:

- Established relationships with major custodians (hospitals, insurance companies, government agencies)
  - Subpoena preparation and service included in the retrieval workflow
  - Status tracking with estimated delivery dates
  - Document delivery directly into your case management system (not separate email attachments)
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## 7. SKIP TRACING AND INVESTIGATIVE RESOURCES

When you cannot locate a defendant, witness, or asset holder, your case stalls. Skip tracing capability integrated into your litigation support platform means you can escalate a failed service attempt into a locate request without switching vendors or re-entering information.

### What to look for:

- In-house skip tracing (not outsourced to a third party)
  - Access to multiple investigative databases and public records sources
  - Integration between process serving and skip tracing (a failed serve automatically triggers a locate request)
  - Transparent pricing per search, not hourly billing with uncertain outcomes
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## 8. CUSTOMER SUPPORT AND RESPONSIVENESS

When a filing is rejected at 4:55 PM on the day of a deadline, you need a human who can help immediately. When a service attempt fails and you need to redirect the server, you need someone who picks up the phone. Evaluate support quality before you need it.

### What to look for:

- 24/7 technical support (not just a chatbot or voicemail after hours)
- Dedicated account manager for firms with regular volume
- Concierge option where experts handle order placement on your behalf

- Average response time commitments (ask for their SLA)
- "What are your support hours and average response time?"
- "Will I have a dedicated account manager or a general support queue?"
- "What happens if I have an urgent filing issue after 5 PM?"

## 9. SECURITY, COMPLIANCE, AND CERTIFICATIONS

You are entrusting a vendor with confidential legal documents, client information, and case strategy. The provider's security posture must meet the standard of care your ethical obligations require.

- ISO certification (demonstrates adherence to international information security standards)
  - SOC 2 compliance or equivalent security auditing
  - Encryption of documents in transit and at rest
  - Role-based access controls within the platform
  - Data retention policies that align with your firm's obligations
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## 10. TRACK RECORD AND INDUSTRY REPUTATION

Litigation support is a relationship business. A provider's technology matters, but so does their institutional knowledge of court procedures, their relationships with court clerks, and their ability to navigate the quirks of specific jurisdictions. This comes from years of experience, not just good software.

### What to look for:

- Years of operation (newer entrants may have good technology but lack institutional relationships)
- Client references from firms similar to yours in size and practice area
- Published reviews on legal industry platforms (G2, Capterra, bar association directories)
- Bar association partnerships and sponsorships (signals community involvement and reputation)
- Founded or led by legal professionals who understand litigation workflows firsthand

Use this scorecard to evaluate up to three providers side by side. Rate each criterion on a scale of 1-5 (1 = does not meet, 3 = meets expectations, 5 = exceeds expectations). Total the scores to identify your best option.

Evaluation Criteria	Weight	Provider A	Provider B	Provider C
1. Service Breadth	x2	___ / 5	___ / 5	___ / 5
2. California Court Coverage	x2	___ / 5	___ / 5	___ / 5
3. Pricing Transparency	x1.5	___ / 5	___ / 5	___ / 5
4. Technology & Platform	x1.5	___ / 5	___ / 5	___ / 5
5. Process Serving	x1.5	___ / 5	___ / 5	___ / 5
6. Records Retrieval	x1	___ / 5	___ / 5	___ / 5
7. Skip Tracing	x1	___ / 5	___ / 5	___ / 5
8. Customer Support	x1.5	___ / 5	___ / 5	___ / 5
9. Security & Compliance	x1	___ / 5	___ / 5	___ / 5
10. Track Record	x1	___ / 5	___ / 5	___ / 5
<b>WEIGHTED TOTAL</b>		___	___	___

**Scoring guidance:** Weight each criterion's score by the multiplier in the Weight column. For example, if you rate a provider 4/5 on Service Breadth (weight x2), their weighted score for that criterion is 8. Sum all weighted scores for the total. The provider with the highest weighted total is your strongest option.

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Legal Document Server was built by attorneys and engineers who understood that law firms shouldn't need four vendors and four logins to manage litigation support.

Our platform combines eFiling, process serving, records retrieval, skip tracing, and case management into a single integrated system, accessible from any device, backed by 24/7 support and ISO-certified security.

**Book a Demo**

See the platform in action.  
No commitment required.

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