

Client Training HQ

Understanding How Annual Maintenance Fees Are Calculated

Annual Maintenance Fees (AMFs) are charges associated with the storage and maintenance of your Foreign National (FN) files. These fees are triggered on the one-year anniversary of the Foreign National case creation but are only billed if at least 100KB (or more) data was stored in OnDocs during the past year.

These fees vary depending on your Firm's agreement, but they are charged to help offset the cost of storing, insuring, and backing up the data stored within the FN's file.

Frequently Asked Questions Related to Annual Maintenance Fees

What type of data is counted toward the 100KB threshold?

SureMessages, Case Notes, and uploaded files (including e-mails) to the OnDocs folder count toward the 100KB threshold.

Will we still incur an AMF if the case is closed or inactive?

Yes, as the documents are still being stored, insured, and backed up, closed or inactive cases would incur an AMF if they require 100KB of data storage or more.

How can I see the size of my files?

The amount of data storage being used by documents in a Foreign National's case file may be viewed in the **OnDocs Notes** tab of the FN profile. The **AMF Info** is located on the lower left side of the screen, just below the **OnDocs History** active links.

What are the benefits of storing documents within your FN files?

Storing documents within your FN files provides several advantages:

- Secure access to the FN documents or forms
- Ability to view documents anywhere with an internet connection
- Reduced need for physical storage
- Increased office efficiency through a centralized location for all FN-related information/documents
- Meets state bar FN retention requirements

How can I avoid Annual Maintenance Fees?

Firms surpassing the 100KB threshold have the ability to opt into one of the unlimited storage options. These options increase the one-time case activation fee (to bundle the AMF charges at a substantial discount), but provide unlimited storage for either five or ten years. If you are interested in this option, please contact us.

What are the advantages of opting into one of the unlimited storage options?

Opting into an unlimited storage option allows Firms to pass along the case activation/storage fee upfront, as it is difficult to pass along the yearly AMF charge. Many Firms use one of the unlimited storage options to move to a paperless environment, saving office space and employee time.

Can we avoid the AMF by deleting data prior to the anniversary date?

The AMF is triggered when the FN storage size reaches 100KB, so deleting the documents will not prevent the charge for the upcoming anniversary. However, if you delete the documents and the FN file remains below 100KB, the Firm will not be charged on the second anniversary.

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