

Odyssey® File & Serve User Guide – Release 3.4

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1 Odyssey® File & Serve Overview

Topics Covered in this Chapter

Filing Queue Status

The Odyssey File & Serve solution enables registered users to file documents with the court anytime, anywhere, 24 hours a day, seven days a week. This highly automated, scalable system provides customers the opportunity to transition from an inefficient paper-based process to a streamlined technology-based electronic filing (e-filing) system.

Filing Queue Status

The filing queue status lets you know where you are in the e-filing process. The key represents the status listed for your filing.

The following filing status key table describes the status associated with each filing type.

Status	Filing Type	Definition
Draft	EFO, EFS, SO	Filer entered full or partial filing data, but has not yet submitted filing.
Submitting	EFO, EFS, SO	Filer has submitted filing, but the document file format and payment information has not been verified on the back end.
Submitted	EFO, EFS, SO	Document file format and payment information has been verified and accepted, but the filing has not yet entered the Review Queue / Workflow Process.
Under Review	EFO, EFS	A clerk reviewer has selected filing from a queue. Note: Once a filing reaches the "Under Review" status, it cannot return to "Submitted." Selecting "End Review" retains the "Under Review" status and returns the filing to the queue.
Accepted	EFO, EFS	Reviewer has reviewed filing and accepted.
Rejected	EFO, EFS	Reviewer has reviewed filing and rejected.
Served	SO	Service only filings completed.

Status	Filing Type	Definition
Cancelled	EFO, EFS, SO Filer cancels filing. Filer concels filing. Filer constraints only cancel draft and sub filings.	
Submission Failed	EFO, EFS	File format or billing error has occurred upon filer submitted filing. Failure specifics are available through "View Details," and the filer is notified of specifics through e-mail.

2 Before You Begin

Topics Covered in this Chapter

- System Requirements
- Prepare to File & Serve
- E-filing Icons
- Page Navigation
- Error Messages

Before you begin, there are several items you should be aware of to assist you with the successful operation of your software.

• Note: Depending on your set up, all features may not be available. As a result, your screen may vary from what is shown in the document.

System Requirements

This section describes the recommended system requirements to successfully use File & Serve.

- Browser Requirements File & Serve supports current versions of the Windows operating system
 using Internet Explorer 7 or above or Firefox. If your browser does not meet these minimum
 requirements, please contact your network administrator.
- Connection Requirements A high-speed Internet connection is recommended.
- **Minimum Screen Resolution** For best results, a setting of 1024x768 or better is highly recommended. If necessary, users can set their monitors to 800x600 pixels, but doing so may compromise the graphic display.
- Document Format PDF is the only format allowed for attaching documents when using File & Serve.

Prepare to File & Serve

This section describes the preparations that needs to be done to successfully e-file and serve your case.

To e-file successfully, complete the following:

- Ensure all documents are completed and signed.
- Convert all documents you plan to e-file into PDF.
- · Check the court rules for required forms, pleadings, and other filings.
- Compile documents into a working directory for easy access while uploading to e-file.

Once the preceding steps are completed, proceed to the Odyssey File & Serve Home Page to submit a filing transaction.

E-filing lcons

Several icons are displayed during the file and serve process. The table below explains the different icons on the screens as you move around the application.

Icon	Description
×	Deactivate the user, unbookmark the case, delete the party, delete a filing, delete a draft envelope, delete a template.
25	Manage your service contacts.
C	View the service contact, filing, or template details.
	File into the case.
	Bookmark the case.
	Resume the draft envelope.
0	Cancel the filing.
	Copy the envelope or filing.
*	Add template to My Favorites folder.
	Edit a template.
	View attached case list.
0	Replace service contacts.

Page Navigation

The following describes how to navigate File & Serve and populate data fields throughout the filing process.

Case Information 2 Parties	Filings OSummary	
Enter the Details for the	New Case	?
Required fields are bold and have an as	sterisk (*).	-
Select Location*	•	
Select Category*		
Select Case Type*	•	
	•	
Short Title	?	
Filing Attorney*	•	
Payment Account*		
	•	
Exit		Parties

Figure 2.1 – Case Information Page

Navigate with Breadcrumbs

Breadcrumbs are a visual representation of the page you are currently on in the filing process. As you complete a page and move to the next page, the next page title illuminates to show you where you are in the process.

1 Note: Breadcrumb navigation requires information to be entered in a sequential order. You cannot move to the next breadcrumb until all of the required information on the current or previous page is completed.



Populate the Data Table

The data table is populated using information entered or selected when completing the forms throughout the filing process.

Party Type	Name	Attorney	
Plaintiff	Jamie Gillespie	E	× *
Defendant	Bob Jones	E	×
Trustee	April Smith	E	×
Petitioner	jackson Williams		•

Figure 2.3 – Data Table

Enter User Information

The user information you enter or select populates the data table.

-

Figure 2.4 – Data Fields

Resume Filing

File & Serve automatically saves a draft of pages where you have completed all required fields. This feature allows you stop work on a filing and resume the filing at a later time. To resume filing of a saved draft, click

WORKSPACE the link at the top of the page, find your case on the **Filings** screen, and click the **D** icon to resume your filing.

LINGS BOOKMARK	S TEMPLATES SERVICE CONTACTS						
/y Firm	All Statuses All	Locations •	From Date K/d/yyyy> 15 To Date	ryyy> 15 Case or Envelope	Filter Export		
Case # 27-CV-1	12-113 - DJE Plaintiff Biz Pro S	e Civ Discrim vs D	JE Sarah LastName (Hedlund	l, Deborah)	22 C - L		
Envelope # 4645 filed Ma	arch 21, 2012 at 3:48 PM by Devon Estes on behalf of	Beth Lewandowski					
Status	Filing Code	Filing Type	Filing Description	Reference Number			
Accepted	Judgment	EFileAndServe	Judg	EFS			
Envelope # 4643 filed Ma Status	arch 21, 2012 at 2:39 PM by Devon Estes on behalf of Filing Code	Mark Schwartz Filing Type	Filing Description	Reference Number			
Status	Filing Code Affidavit and Order for Dismissal	Filing Type	Filing Description	DJF 1/1			
Case # 27-CV-1	12-113 - DJE Plaintiff Biz Pro S	e Civ Discrim vs D	JE Sarah LastName (Hedlund	, Deborah)	* C • • •		
Envelope # 4595 filed Ma	arch 15, 2012 at 11:43 AM by Devon Estes on behalf o	f Mark Schwartz					
Status	Filing Code	Filing Type	Filing Description	Reference Number			
Rejected	Amended Petition	EFileAndServe	amended pet	1/3 EFS			
Rejected	Notice of Withdrawal of Counsel	EFile	notice of withdrawal of counsel	2/3 EFO			

Figure 2.5 – File & Serve Workspace

Error Messages

File & Serve displays several error messages to alert users when required information is not entered or invalid information is provided.

Enter Data in Required Fields

Required fields are those that contain an asterisk (*) next to the field name. If you don't enter the information required into a required field and try to advance, you will receive error messages. Note: Required fields may vary in different sections.

Look for a field outlined in red in your form. Place the cursor on the outline of the field, and a required field message displays.

Case Information	Parties	Filings	Summary				
Enter the Detail	s for the N	New Case					?
Required fields are bold a	and have an ast	erisk (*).					
Select Location*							
			~				
Select Category*							
			Required	Field			
Select Case Type*							
			•				
Short Title							
			?				
Filing Attorney*							
			-				
Payment Account*							
			•				
I							
1							
Exit							Parties

Figure 2.6 – Required Field Error Message

Receive Error Messages

When File & Serve displays an invalid error message, this means a required field must be populated to continue.

If the screen does not change when a navigation button is selected, look for a field outlined in red in your form. Place the cursor on the outline of the field, and an error message displays.

Zip*				
654656	Invalid Zip Code			
·				

Figure 2.7 – Invalid Entry Error Message

3 File & Serve Registration

Topics Covered in this Chapter

- File & Serve Home Page
- Registering as a User with an Existing Firm
- Registering as an Independent User
- Resetting your Password

Registration is the process of registering users in the system using their name and contact information. File & Serve requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

File & Serve Home Page

The File & Serve home page serves as the gateway to the File & Serve system. From this screen, you can register, log in, read your court's **Message of the Day**, access the user guides, view training sessions, and get contact information for Technical Support.

	•				
Email Address Password Keep me koged in @ LOGM Forgot Password? Register Now	MESSAGE OF THE DAY Particular Register II				
LEARN - E-File User Guide - Administrator Guide - Guidk Reference Guide - Frequently Asked Questions		TRAIN For Training Sessions Conference Training Sessions Set Study Conference Training Hobolacian Automatic Segmentation Beacca and Administration Beacca and Administration Beacca and Administration Beacca and Administration Beacca and Sessional Beacca and Sess	CONTACT Please cit or email Technical Stupport if you have questions: 800 297 5377 or emiling supporting you have questions: 800 297 5377 or Support any such to assist you by sharing your screen with GoToAssist Support can assist you via Support Chat Provide Support Chat Provide Support Chat Provide Support Support Chat Provide Support Support Chat Provide Support Support Chat Provide Support Su		

Figure 3.1 – File & Serve Home Page

Message of the Day

The **Message of the Day** provides important messages from the court. Check this section daily for important messages from the court.

Login

The **Login** area allows the user to log in and use the File & Serve system. Users can log in to File & Serve by entering their e-mail address and password.

Register Now

The **Register Now** link takes you to the page where you can register users in the system using their name and contact information. File & Serve requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

Learn

The **Learn** section has links to the File & Serve user documentation. The following types of documents available to help you answer many of your day-to-day operation questions:

- The File & Serve User Guide provides step-by-step instructions on using the File & Serve system. The user guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and password.
- The **Firm Administrator Guide** is specifically for the Firm Administrator. This guides covers administrative functions such as registering the firm; managing user, payment, and attorney accounts; and creating and editing the firm's contact lists.
- The Quick Reference Guide (QRG) provides only the steps needed to complete common File & Serve tasks such as registering as a user with an existing firm, logging in to the system, searching for a case, initiating a new case, filing into an existing case, and reviewing the filing status.
- The **Frequently Asked Questions** (FAQ) guide lists the most frequently asked questions from the users. The FAQ covers questions pertaining to File & Serve functionality.

Train

File & Serve offers free regularly scheduled online training for File & Serve. You can register for training online and download user manuals.

- The **Web Conference Training Sessions** are scheduled according to the needs of the courts. Locate your specific court by scrolling through the list of training sessions for your court.
- Self-study Online Training is available by clicking on the link and choosing the topic of your choice.

Registering as a User with an Existing Firm

You can register as a user if your Firm Administrator has already registered with File & Serve and approved users to self-register.

• Note: You must know your firm's name to set up your account. The Firm Administrator may not allow users to self register. If this is the case, the firm's name is not available when searching, and you must contact the Firm Administrator to be registered.

Odyssey® File & Serve

Email Address Password Keep me logged	in 🕣	LOGIN
Forgot Password?	I	Register Now
Figure 3.2 – Logir	n Wir	ldow

Perform the following steps to register as a user in the firm:

1. Click the Register Now link on the login screen.

The File and Serve Registration Wizard opens.

Note: There is no fee to sign up for File & Serve.



Figure 3.3 – File and Serve Registration Wizard (Step 1 of 4)

1 Note: Registration options vary by site.

- 2. Select the User with an Existing Firm option.
- 3. Click the **Next** button to select your firm, or click the **Cancel** button to cancel the registration process.

File and Se	rve Registration Wizard	Step 2 of 4
Select Your	Firm	
Narrow your firm list	by entering all or part of the firm name.	
Search for Firm		Search
Selected Firm*	Tyler Tech System main	
	plano , TX 75093	
Donovan Law		
HauserLaw		
Law Firm		
Michigan Court of	Appeals	
Patricia Schuelke		
Rashawn Milam		
Rob Test		
Robert Adkins		
Tyler Tech System	1	
Previous	ancel	Next

Figure 3.4 – File and Serve Registration Wizard (Step 2 of 4)

- 4. Type your **Firm Name**, or click the **Search** button to view a list of all available firms.
- 5. Select your firm's name from the list.
- 6. Click the **Next** button to enter your account information; click the **Previous** button to return to the previous screen; or click the **Cancel** button to cancel the registration process.

USEI IIIOIIIIa	luon		
All required fields are	indicated by an "*". Then	e is no registration f	ee for File & Serve.
First Name*	Janice		MI
Last Name*	Doe		
Email Address*	jdoe@courts.com		
Verify Email Address*	jdoe@courts.com		
	Your password is case sensitive and must be at least six characters.		
Password*	•••••		
Verify Password*	•••••		
I am also an Attorney	Attorney Number*	1231231231	
Compose a simple questi forget it. Please choose a School Mascot or The Nai Security Question*	on and answer pair which will a a simple, specific question that me of My First Pet. My Start Date	llow you to restore your can only be answered by	password, should you you. Example: High
Security Answer*	Jan. 1, 2011		

Figure 3.5 – File and Serve Registration Wizard (Step 3 of 4)

• Note: An asterisk (*) indicates required information.

7. Complete the User Information form.

8. Enter a simple Security Question in the field provided. (Example: What was your high school mascot?)

Security Question*	
Figure 3.6 – Securi	y Question Field

9. Enter a Security Answer in the field provided.

Security Answer*		
Figure 3.7 – Securit	y Answer Field	

• Note: Select I am also an Attorney if you are an attorney, and then enter your attorney number in the field. Attorney number formats vary by site; refer to your court's website for information on how to enter your attorney number.

Attorney Number*	
Figure 3.8 – Attorney	Number Field

• Note: Click the button if prompted. This verifies your attorney number is in the system.

10. Click the Register button. File & Serve displays the Your Registration is Complete. message on the screen.



Figure 3.9 – File and Serve Registration Wizard (Step 4 of 4)

11. Record the login details displayed for your records.

12. Click the **Finish** button.

13. Go to your e-mail inbox to access your registration confirmation e-mail.

• Note: You must verify your e-mail address to complete the registration process. A verification e-mail (from no-reply@tylerhost.net) will be sent to you. Open the e-mail and click the link to confirm your e-mail address. If you don't see the e-mail in your inbox, check your junk mail folder for the e-mail.

Your registration is now complete. Once you have received your e-mail confirmation, return to the login screen to log in to File & Serve.

Registering as an Independent User

You can register as an "independent user" if you are a single user of the system, meaning a user not associated with any firm or being represented by any firm.

• Note: Refer to your local court's website before registering as an independent user, as registration options may vary.

Perform the following steps to register as an independent user:

1. Click the Register Now link.

Note: There is no fee to sign up for File & Serve.

- 2. Select the An Independent User option.
- 3. Click the **Next** button to continue; click the **Previous** button to go back; or click the **Cancel** button to cancel the registration process.



Figure 3.10 – File and Serve Registration Wizard (Step 1 of 5)

4. Read the Odyssey File and Serve Usage Agreement.

Odyssey File & Serve Usag Welcome to the online services of Tyler Technologies Please read this Agreement carefully. It governs Your Odyssey File & Serve application through the Tyler Te	e Agreement for the State of New Mexico. access to and use of the
Welcome to the online services of Tyler Technologies Please read this Agreement carefully. It governs Your Odyssey File & Serve application through the Tyler Te	for the State of New Mexico.
Please read this Agreement carefully. It governs Your Odyssey File & Serve application through the Tyler Te	access to and use of the
Odyssey File & Serve application through the Tyler Te	
use of the Tules Technologies Cite and (as other Tules)	chnologies Internet Site. Your
use of the Tyler Technologies Site and/or other Tyler	products is conditioned upon
Your acceptance of this Agreement. By clicking on the	"I Accept" button, You are
agreeing to be legally bound by all of the terms and o	conditions of this Agreement. If
rou are acting as an employee, rou agree that this Ag	ad in this Agreement, "You" or
"Your" includes You and Your employer	ed in this Agreement, Tou or
Section 1. Definitions	
Section 2. License: Restrictions on Use	
Section 3. Access to the Tyler Internet Site	
Section 4. Limitations on Use	
Section 5. Fee Schedule	
Section 6. Proprietary Rights	
Section 7. Disclaimers and Limitations	
Section 8. Your Warranties and Indemnification	
Section 9. Limitations of Liability	
Section 10. Arbitration	
Section 11. Miscellaneous	
Section 1. Definitions	
The following terms have the following meanings in th	nis Agreement: "Authorized
11 B B B B B B B B B B B B B B B B B B	· · · · · ·

Figure 3.11 – File and Serve Registration Wizard (Step 2 of 5)

- 5. Select the I Agree check box to accept and agree to the terms listed on your screen.
- 6. Click the Next button to continue; click the Previous button to go back; or click the Cancel button to cancel the registration process.
- 7. Complete the **Contact Information** form.

treet Address*		
treet Address Line 2		
ity*		
tate*	•	Zip*
hone Number*		

Figure 3.12 – File and Serve Registration Wizard (Step 3 of 5)

- 8. Click the Next button to continue; click the Previous button to go back; or click the Cancel button to cancel the registration process.
- 9. Complete the **User Information** form.

File and Serv	e Registration Wizard	Step 4 of 5
User Informa	tion	
All required fields are	indicated by an "*". There is no registrat	ion fee for File & Serve.
First Name*		MI
Last Name*		
Email Address*		
Verify Email Address*		
	Your password is case sensitive and must be at least six character	8.
Password*		
Verify Password*		
I am also an Attorney		
Compose a simple questi forget it. Please choose a School Mascot or The Nar Sceurity Questions	on and answer pair which will allow you to restore simple, specific question that can only be answer ne of My First Pet.	your password, should you red by you. Example: High
Security Question-		
Security Answer*		
Previous Can	cel	Register

Figure 3.13 – File and Serve Registration Wizard (Step 4 of 5)

10. Enter a question in the **Security Question** field.

• Note: File & Serve requests your security question to restore your password in case you forget your password.

- 11. Enter a response in the Security Answer field.
- 12. Click the Register button.

File & Serve displays a Your Registration is Complete message on the screen.



Figure 3.14 – File and Serve Registration Wizard (Step 5 of 5)

13. Click the **Finish** button.

• Note: You must verify your e-mail address to complete the registration process. A verification e-mail from no-reply@tylerhost.net will be sent to you; open the e-mail and click the link to confirm your e-mail address. If you don't see the e-mail in your inbox, check your junk mail folder for the e-mail.

Your registration is complete, go to your home page to log in to use File & Serve.

Resetting your Password

If you have forgotten your password, you can reset your password by entering the e-mail address provided during registration and clicking the **Forgot Password?** link.

1 Note: Your password is case-sensitive. Make sure your caps lock is not on.

• Note: You can unlock your account by using the Forgot Password? option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.

Email Address Password		
Keep me logged	in	LOGIN
Forgot Password?	I	Register Now
Figure 3.15 – Login Wind	ow	

1. Click the **Forgot Password?** link on the **Login** window.

The **Reset Password** window opens.

Reset Password	
Reset Password	
Enter your email address and answer your security question to re your password.	set
Email Address	Next
Cancel	Ok
Figure 3.16 – Reset Password – E-mail Address	

- 2. Type the e-mail address you provided during the registration process in the **E-mail Address** field.
- 3. Click the **Next** button to continue.

Reset Password	
Reset Passwe	ord
Enter your email your password.	address and answer your security question to reset
Email Address Security Question Security Answer	planofeedback@tylertech.com Who is Dept. Manager
Cancel	Ok
Figure 3.17 – Re	eset Password – Security Answer

- 4. Type your answer in the **Security Answer** field.
 - ODY-FS-200-3116 v.7

5. Click the ok button, or click the Cancel button to cancel the reset password process.

Your password has been reset. Check your e-mail account for a temporary password to log in to File & Serve to change your password to one you prefer to use.



6. Click the **Ok** button to return to the **Login** window to log in to File & Serve.

4 File & Serve Login and Logout

Topics Covered in this Chapter

- Logging into File & Serve
- Logging out of File & Serve

All users are required to log into File & Serve to e-file and serve a document or to check the status of an existing filing. It is also a best practice for users to log out of File & Serve after they have completed their transactions.

Logging into File & Serve

You can log in by using your e-mail address and password provided during the registration process. You must log in to be able to use File & Serve.

• Note: Click Register Now to register if you have not registered to use File & Serve.

Perform the following steps to log in:

- 1. Go to your File & Serve home page.
- 2. Enter your e-mail address and password (case-sensitive) in the fields provided.

Email Address		
Password		
📃 Keep me logged i	n 🚯	
		LOGIN
Forgot Password?	I	Register Now

Figure 4.1 – File & Serve Login Area

- 3. Select the Keep me logged in C check box to stay logged in to File & Serve. This keeps you logged in to File & Serve until you click the logout link to logout.
- 4. Click the LOGIN button.

• Note: After several failed attempts to log in to the system, your account is locked. You can unlock your account by using the Forgot Password? option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.

Once you have successfully logged in, you can begin to use File & Serve.

Logging out of File & Serve

This section describes how to properly log out of File & Serve.

Perform the following steps to log out of File & Serve:

1. Click the **LOGOUT** link at the top right corner of the page to automatically log out of File & Serve.

INFO	ABOUT L	DGOUT /	Welcome System System
	NEW CASE	FIND CASE	Case Number Go
Figure 4.2 –	Logout Link		

2. Return to the File & Serve home page to log in to the system.

5 File & Serve Workspace

The Workspace page displays the links to access the Filings, Bookmarks, Templates, and Service Contacts pages.

Firm	✓ All Statuses ✓	All Locations •	From Date	YYYY> 15 Case or Envelope	Filter Exp
ase # 27-CV-	12-113 - DJE Plaintiff Biz P	ro Se Civ Discrim vs DJ	E Sarah LastName (Hedlund	l, Deborah)	2ª C 🖿 🖬
Envelope # 4645 filed N	Narch 21, 2012 at 3:48 PM by Devon Estes on be	half of Beth Lewandowski			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Accepted	Judgment	EFileAndServe	Judg	EFS	
invelope # 4643 filed N	Aarch 21, 2012 at 2:39 PM by Devon Estes on be Filing Code	half of Mark Schwartz Filing Type	Filing Description	Reference Number	
Status	Filing Code	Filing Type	Filing Description	Reference Number	
ase # 27-CV-	12-113 - DJE Plaintiff Biz P	ro Se Civ Discrim vs DJ	E Sarah LastName (Hedlund	i, Deborah)	28 C 🖿 🚺 🖬
Envelope # 4595 filed N	Narch 15, 2012 at 11:43 AM by Devon Estes on b	ehalf of Mark Schwartz			
	Filing Code	Filing Type	Filing Description	Reference Number	
Status	Amended Petition	EFileAndServe	amended pet	1/3 EFS	
Rejected	Ameridear eduori				
Status Rejected Rejected	Notice of Withdrawal of Counsel	EFile	notice of withdrawal of counsel	2/3 EFO	

Figure 5.1 – File & Serve Workspace

Workspace

You can access the **Workspace** after you have successfully logged into File & Serve. Click the **WORKSPACE** link at the top-right corner of the page. This will take you to the **Workspace** page.

The **Workspace** pages are used to view recent filings, manage templates, file into existing cases, manage case service contacts, bookmark cases, view the details of the case, copy the envelope to use in another filing, or cancel a filing (prior to court approval).

From the **Workspace** screen, you can perform the following tasks.

New Case

Use the New Case link located at the top of your screen for filing a new case, page 25.

Find a Case

You can search for a case by entering a case number or by entering the party name in the Find Case field.

Filings

From the Filings screen, you can perform the following tasks:

- · View the status of your filing
- Check the filing type
- Get a document description
- · See the number assigned to your case
- View case details
- Filter the Filing Queue, page 40
- Add service contacts, page 47
- View envelope details, page 33

- Copy the envelope, page 43
- Resume the filing process, page 45

Bookmarks

The **Bookmarks** screen displays a list of case numbers and descriptions for the cases you have bookmarked. Only you and your firm (depending on the firm setup) may see this information. Neither the public nor any other firm will be able to see your case list.

From the **Bookmarks** screen, you can perform the following tasks:

- View bookmarked cases
- Refresh the cases list
- File into an existing case, page 33
- · Remove a case from the bookmark list

Service Contacts

From the Service Contacts screen, you can perform the following tasks:

- Add service contacts, page 47
- View service contact details, page 57
- View the attached cases list, page 59
- Replace service contacts on the case, page 59

6 Templates

Users can establish and manage filing templates that simplify the filings for common parties, events, and documents when filing a new case.

				-								
fy Firm	•	All Statuses	•	All Locations	•	From Date <m d="" yyyy=""></m>	To Date	<m d="" yyyy=""></m>	Case or En	welope	Filter	Ехро
Case # 27-C	CV-12-115	- ()									2ª C	
Envelope # 4504 fil	led March 09, 20	12 at 1:54 PM by Devon E	Estes on beh	alf of Beth Lewandowski								
Status		Filing Code		Filing Type		Filing Description		R	eference Number			
Accepted		Admission of Service		EFile		DJE Henn Civil Adm	of Serv	fil	ing 1 test to Serve			
Caso # 27.C	V-12-113	DIE Plaintiff	F Biz Dr	o So Civ Discrim v	- n	IE Sarah LastNamo		llund Dobo	rah)			
	V-12-113			V SE CIV DISCHIII V	5 0		(nec	nunu, Deboi	an <i>j</i>	E		
Statue	d March 09, 2012	2 at 12:52 PM by Devon E	stes on bena	all of Mark Scriwartz								
		Filing Code		Filing Type		Filing Description		P	eference Number			
Draft		Filing Code		Filing Type		Filing Description	lenn	R	eference Number	er		
Draft		Filing Code Service Only		Filing Type Serve		Filing Description Civil Discrimination H	lenn	R	eference Number JE Civil Service Waive	er		
Draft		Filing Code Service Only		Filing Type Serve		Filing Description Civil Discrimination H	lenn	R	eference Number JE Civil Service Waive	er		
Draft Case # 27-C	:V-12-113	Filing Code Service Only - DJE Plaintiff	f Biz Pro	Filing Type Serve	s D	Filing Description Civil Discrimination H JE Sarah LastName	enn	R D Ilund, Deboi	eference Number JE Civil Service Waive rah)	er		
Draft Case # 27-C Draft # 4501 started	V-12-113 d March 09, 2012	Filing Code Service Only - DJE Plaintiff 2 at 12:37 PM by Devon E	f Biz Pro	Filing Type Serve O Se Civ Discrim vs alf of Mark Schwartz	s D	Filing Description Civil Discrimination H	enn (Hec	R D	eference Number JE Civil Service Waive rah)	er		30
Draft Case # 27-C Draft # 4501 started Status	X-12-113	Filing Code Service Only - DJE Plaintiff 2 at 12:37 PM by Devon E Filing Code	f Biz Pro	Filing Type Serve O Se Civ Discrim V: alf of Mark Schwartz Filing Type	s D	Filing Description Civil Discrimination H JE Sarah LastName Filing Description	enn (Hec	R D Ilund, Deboi R	eference Number JE Civil Service Waive rah) eference Number	er	• E • 1	30
Draft Case # 27-C Draft # 4501 started Status Draft	XV-12-113 d March 09, 2012	Filing Code Service Only - DJE Plaintiff 2 at 12:37 PM by Devon E Filing Code Memorandum and Alfida	f Biz Pro	Filing Type Serve O Se Civ Discrim V: alf of Mark Schwartz Filing Type EFileAndServe	s D	Filing Description Civil Discrimination H JE Sarah LastName Filing Description DJE Civ memo and A	lenn e (Hec	R D Ilund, Deboi R ଲା	eference Number JE Civil Service Walve rah) eference Number ing 1/3	er		
Draft Case # 27-C Draft #4501 started Status Draft Draft	CV-12-113 d March 09, 2012	Filing Code Service Only - DJE Plaintiff 2 at 12:37 PM by Devon E Filing Code Memorandum and Alfide Motion for Review	f Biz Pro	Filing Type Serve O Se Civ Discrim VS all of Mark Schwartz Filing Type EFileAndServe EFileAndServe	s D	Filing Description Civil Discrimination H JE Sarah LastName Filing Description DJE Civ memo and A Civ Mot for Rev	e (Hec	R D Ilund, Deboi ព ព ព ព ព ព	eference Number JE Civil Service Waive rah) eference Number ing 1/3 ing 2/3 EFS	er		 N N

Figure 6.1 – Templates Screen

Using the **Templates** screen, filers are able to create, manage, and use a filing template recently created.

When creating a new filing using a template, the information can be modified as needed for the particular filing. The modification will not affect the original template. Templates created by an individual filer are accessible by all users within the firm.

From the Templates screen, you can perform the following tasks:

- Save commonly used templates to the **My Favorites** folder for easier access to the template.
- To view the templates saved in My Favorites, select My Templates from the drop-down list, and then click the Filter button.
- To view the templates saved by your firm, select My Firm from the drop-down list, and then click the Filter button.
- To select a location, use the drop-down list to filter by location, and then click the Filter button.
- To select a case type, use the drop-down list to filter by case types, and then click the Filter button.
- To select a filing code, use the drop-down list to filter by filing codes, and then click the button.

- Click the icon to add the template to your favorites.
- Click the details.
- Click the icon to file using an existing template.
- Click the *icon* to edit the template.
- Click the 🔀 icon to delete the template.

7 Case Initiation

Topics Covered in this Chapter

- Filing a New Case
- Entering Party Details
- Entering Filing Details
- Viewing the Case Summary

Initiate a case using the NEW CASE link located at the top of your screen.



Click the **New Case** link at the top of the page to open the **Case Information** page and to begin the case initiation process for e-filing.

• Note: A payment account must exist before you can submit a filing.

Filing a New Case

File a new case using the Case Information screen.

A payment account and a filing attorney must be set up prior to filing a new case. Contact your Firm Administrator to set up the accounts prior to starting the filing process.

Perform the following steps to file a new case:

1. Click the **NEW CASE** link.

NEW CASE	FIND CASE	Case Number	Go
	a a Limbr		

Figure 7.2 – New Case Link

The Case Information page opens.

Case Information	Parties	Filings	Summary	
Enter the Details	s for the N	lew Case		?
Required fields are bold a	nd have an ast	erisk (*).		
Select Location*				
			•	
Select Category*				
			•	
Select Case Type*				
			•	
Short Title				
			?	
Filing Attorney*				
			•	
Payment Account*				
			•	
Exit				Parties

Figure 7.3 – Case Information Page

2. Complete the details for the new case form using the drop-down list.

1 Note: An asterisk indicates required fields.

3. Click the **Parties** button to save the case information and continue.

• Note: Once you click the **Parties** button, File & Serve automatically saves a draft of those pages where all required fields have been completed. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing a saved draft, click the **WORKSPACE** link at the top of the page, find your case on the Filings screen, and click the **D** icon.

Entering Party Details

Each case requires a party type. File & Serve requires that you complete all required information for the party types in the fields provided.

Case Inform	ation 🕑 Parties 🕑 Fil	ings 🔘 Summary			
Party Type	Name			Attorney	
Defendent	Jameson Westinghouse			Atty2 Attry2	86
DD PARTY					
Party Type*	(i)			Attorney	
Defendent	•	Person	Business	Atty2 Attry2	
First Name*		Middle		Last Name* (j)	
Jameson				Westinghouse	
Address*				City*	
323 Alamand	ler Way			Chicago	
State*		Zip*			
Illinois	•	56565			
Phone					
	Ex: 555-123-1234				

Figure 7.4 – Parties Page

Perform the following steps to enter the details for the parties involved in the case:

- 1. Click the **Parties** button from the **Case Information** screen to enter the party details for the case.
- 2. Choose the party type by selecting either **Plaintiff** or **Defendant** under the **Party Type** column. You can also select the party type using the drop-down menu in the **Party Type** field.
- 3. Enter the party information in the fields provided.

1 Note: Required field names are bold and followed by an asterisk.

If you want to add another party to the filing, click the **ADD PARTY** button, and enter the party information in the required fields.

4. Click the **Filings** button to save the party details, or click the **Case Information** button to return to the previous screen.

Entering Filing Details

The **Filing Details** screen allows you to enter the filing details and calculate the fees associated with the filing.

Case Information	Farbes OFinings Summary			
-			Fees	
dd Another Filing			Transcript - Party Request	
			Filing Fee	\$0.00
Select Filing Code* 🥡			Case Initiation Eco	\$0.00
Transcript - Party Request		✓ EFIle Service	Case Initiation Fee	\$0.00
Filing Description*			Service Fee	\$5.00
Defendant request case i	nformation		Convenience Fee	\$1.00
Reference Number			Envelope Total	\$6.00
777-565685			Deument	
Documents (i)			S Payment	
Lead Document*	3.1 FAQ Basics.pdf		Payment Account*	
	83.7 kb	E4	Mastercard - TS	•
	Description		Party Responsible for Fees*	
	3.1_FAQ_Basics.pdf		Jameson Westinghouse	•
Attachments			Filing Attorney	
	Click to Browse or Drag Files Here		Eiling Atterney's	
Filing Comments*			Atty2 Atty2	•
ining comments	Enter Filing Party and Additional Comments		,,.	
	Enter Fining Party and Additional Commenta			

Figure 7.5 – Entering Filing Details Screen

Perform the following steps to enter the filing details for the case:

- 1. Click the **Filings** button from the **Parties** screen to enter the filing details.
- 2. Select the filing code using the Select Filing Code drop-down menu.
- 3. Select the EFfile check box to select the e-file option.
- 4. Enter a brief description of the filing associated with the filing code previously selected in the **Filing Description** field.
- 5. Type a reference number of your choice that you can refer back to for this filing in the **Reference Number** field.
- 6. Select the Lead Document for this filing.
 - a. Click Click to Browse or Drag Files Here to select a Lead Document.

This opens Windows Explorer on your computer.

b. Select a document to upload from the files on your computer.

1 Note: Only one document can be uploaded as a lead document.

- c. Click _____ to attach the file.
- d. Wait as the attachment uploads.
- e. Type a description of the uploaded attachment.
- f. Select a security option for the attachment.
- g. To delete the uploaded attachment, click the 🔛 icon.
- 7. Select the Attachments to upload for this filing.
 - a. Click Click to Browse or Drag Files Here to select an attachment.

This opens Windows Explorer on your computer.

- b. Select the attachments to upload from the files on your computer.
 - **1** Note: Multiple documents can be uploaded as attachments simultaneously.

Documents (i)		
Lead Documents*	3.1_FAQ_Basics.pdf 83.7 kb Description	×
	3.1_FAQ_Basics.pdf	✓ Confidential
Attachment Documents	Add More Documents	
	3.1_FAQ_Formatting Errors.pdf 67.6 kb	×
	Description	
	3.1_FAQ_Formatting Errors.pdf	✓ Confidential

Figure 7.6 – Uploading an Attachment

- c. Click to attach the file.
- d. Wait as the attachment uploads.
- e. Type a description of the uploaded attachment.
- f. Select a security option for the attachment.
- g. To delete the uploaded attachment, click Marcale I located under Confidential.
- 8. Enter the Filing Comments for the court reviewer to read.
- 9. Click the Add Another Filing button to add more documents to this envelope.
- 10. Review the filing **Fees** located on the right side of the screen.

• Note: File & Serve authorizes your credit card; however, the transaction fees will not post to the credit card account until the court accepts the filing. Once the filing is accepted, File & Serve displays the total filing fee to be submitted for the filing.

- 11. Select a payment account to use to pay the filing fees.
- 12. Select the party responsible for the filing fees.
- 13. Select a filing attorney.
- 14. Click the Summary button to save the filing details when you are done, or click the button to return to the previous screen.

Parties

Viewing the Case Summary

The **Summary** page displays the case information, parties involved in the case, filing details, fees, payments, and filing attorney for the case.

The **Parties** and **Filings** pages must be complete before you can view the case summary. A payment account and a filing attorney must be assigned to the case to complete the filing process.

Perform the following steps to view the case summary:

1. Click the **Summary** button from the **Filings** screen to view the case summary.

	-								
Envelope and Fil	ing Sum	mary					Fees		
Case Informatio	n					Edit 🔗	Service Only		
Location: Case Category:		Michigan Court of Appeals Criminal	Filing Attorney: Payment Account:	A	ty2 Attry2 astercard - TS			Filing Fee Total this Filing	\$0.0 \$0.0
Case Type: Date Filed:		Appeal/Original Action					Case Initiation Fee		\$0.0
Lower Court/Agency:		Michigan Pubic Service Commissi	on				Service Fee		\$5.0
Lower Court/Agency (Case Short Title:	Case #:	Theft					Convenience Fee		\$1.0
							Envelo	pe Total	\$6.0
Parties						Edit 🔿	Payment		
Party Type	Name	Address		Phone	Attorney		Payment Account*		
Defendent	Jameson	323 Alamander Way,	Chicago, IL 56565		Atty2 Attry	/2	Mastercard - TS		•
							Party Responsible for Fe	es*	
Filings						Edit 🔗	Jameson Westinghouse		•
Filing Code		Filing Descriptio	n	Reference	Number Filing T	уре	Filing Attorney		
Service Only		456		4564	EFile		Filing Attorney*		
	File Nan	ne			Status		Atty2 Attry2		*
Service Documents	Enterin	g Filing Details.pdf			Ok				
Filing Comments:	456								

Figure 7.7 – Envelope and Filing Summary Page

The Envelope and Filings Summary window opens. Here, you can view the Case Information, the Parties involved in the case, Filing codes, the filing Fees, the Payment accounts, and the Filing Attorney for the case.

2. Click the **Submit** button to submit your filing, or click the **Filings** button to take you back to the **Filings** screen.

8 Case Search

Topics Covered in this Chapter

- Searching by Case Number
- Searching by Party Name

Search for a case by entering the case number assigned by the courts or by entering the party name in the **Find Case** field.

Searching by Case Number

Search for a case by entering the exact case number assigned by your court in the **Case Number** field at the top-right corner of your screen. No wildcards can be used in the **Case Number** field. Searching by case number is one of the two most common ways to search for an existing case.

NEW CASE	FIND CASE	Case Number Go
	Search by	
	Case Number	
	Party Name	
Figure 8.1 –	Search by (Case Number Option

Perform the following steps to search for an existing case:

- 1. Click the **FIND CASE** link at the top of the page.
- 2. Click the drop-down arrow to view the search options.
- 3. Select the Case Number option.

File & Serve displays the word Case Number in the case search field.

- 4. Type the exact case number assigned by your court in the **Case Number** field. No wildcards can be used in the **Case Number** field.
- 5. Click the Go button.

The result screen displays the case meeting the criteria entered in the Case Number field.

case municer	Description	Actions
11-000131-CK	Brown, Jane v Black, Jane	

Figure 8.2 – Case Search Results

6. Select an icon under the **Actions** column and perform actions as necessary, or click the **Close** button if you choose not to perform any further actions.

Searching by Party Name

You can search for a case by using the names of the parties involved in the case.

NEW CASE	FIND CASE	Party Name	Go
	Search by		
	Case Number		
	Party Name		

Figure 8.3 – Searching by Party Name Option

Perform the following steps to search for a case using the party's name:

- 1. Click the **FIND CASE** link at the top of the page.
- 2. Click the drop-down arrow to view the search options.
- 3. Select the **Party Name** option.

File & Serve displays the word Party Name in the search field.

- 4. Type the party's first and last name in the *Party Name* field to search for a case by party name.
- 5. Click the **Go** button.

File & Serve displays a list of cases meeting the criteria entered in the Party Name field.

- 6. Select an icon under the Actions column and perform actions as necessary.
- 7. Click the **Close** button when you are done.

9 Subsequent Filing

Topics Covered in this Chapter

Filing into an Existing Case

Once a new case has been created by the courts, you can file into the existing case. Filing into an existing case is also called subsequent filing.

Filing into an Existing Case

You can file into an existing case once you have initiated a case either in File & Serve or at the courthouse. The procedures that follow describe the three different ways to access a case to file into the case. Perform the following steps to access your case to begin a subsequent filing.

1. Click the **WORKSPACE** link at the top of the page.

1 Note: This will take you to the Filings screen.



Figure 9.1 – Filing Screen

- a. Locate your case on the Filings screen.
- b. Click the icon to file into the case.
- c. Complete the filing details, page 28.

Viewing the Envelope Details

From the **Filings** screen, you can see the information entered for the envelope, the filing details, and the documents submitted.

Perform the following steps to view the envelope details:

1. Click the **WORKSPACE** link at the top of the page.

• Note: This will take you to the Filings screen.

Firm	All Statuses All	Locations •	From Date <m d="" yyyy=""> To Date <m d="" th="" y<=""><th>Case or Envelope</th><th>Filter</th></m></m>	Case or Envelope	Filter
		cocatorio			T nice and
None # 07 CV/			E Carab LootName / Hedlund	Debergh	
ase # 27-0v-	12-113 - DJE Plaintin Biz Pro S	e Civ Discrim vs DJ	E Saran LastName (Hediund	, Deboran)	
Envelope # 4645 filed M	arch 21, 2012 at 3:48 PM by Devon Estes on behalf of	Beth Lewandowski			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Accepted	Judgment	EFileAndServe	Judg	EFS	
# 07 FT					
	SV-12-12 - ()				
ase # 21-E1-0					
Envelope # 4643 filed M	arch 21, 2012 at 2:39 PM by Devon Estes on behalf of	Mark Schwartz			
Envelope # 4643 filed M Status	larch 21, 2012 at 2:39 PM by Devon Estes on behalf of Filing Code	Mark Schwartz Filing Type	Filing Description	Reference Number	
Envelope # 4643 filed M Status	arch 21, 2012 at 2:39 PM by Devon Estes on behalf of Filing Code Affidavit and Order for Dismissal	Mark Schwartz Filing Type EFile	Filing Description Power of Atty	Reference Number DJE 1/1	
Accepted	arch 21, 2012 at 2:39 PM by Devon Estes on behalf of Filing Code Affidavit and Order for Dismissal	Mark Schwartz Filing Type EFile	Filing Description Power of Atty	Reference Number DJE 1/1	
Envelope # 4643 filed M Status Accepted	arch 21, 2012 at 2:39 PM by Devon Estes on behalf of Filing Code Affidavit and Order for Dismissal	Mark Schwartz Filing Type EFile	Filing Description Power of Atty	Reference Number DJE 1/1	
Table # 27-E1-C Envelope # 4643 filed M Status Accepted	Arch 21, 2012 at 2:39 PM by Devon Estes on behalf of Filing Code Affidavit and Order for Dismissal	Mark Schwartz Filing Type EFile	Filing Description Power of Atty E Sarah LastName (Hedlund	Reference Number DJE 1/1	
Envelope # 4643 filed M Status Accepted	arch 21, 2012 at 2:39 PM by Devon Estes on behalf of Filing Code Affidavit and Order for Dismissal 12-113 - DJE Plaintiff Biz Pro S arch 15, 2012 at 11:43 AM by Devon Estes on behalf of	Mark Schwartz Filing Type EFile Ce Civ Discrim vs DJ (Mark Schwartz	Filing Description Power of Alty E Sarah LastName (Hedlund	Reference Number DJE 1/1 I, Deborah)	24 C 🖿 🗖
Case # 27-E1-C Envelope # 4643 filed M Status Case # 27-CV- Envelope # 4595 filed M Status	arch 21, 2012 at 2.39 PM by Devon Estes on behalf of Filing Code Affidavit and Order for Dismissal 12-113 - DJE Plaintiff Biz Pro S arch 15, 2012 at 11.43 AM by Devon Estes on behalf of Filing Code	Mark Schwartz Filing Type EFile C Civ Discrim vs DJ (Mark Schwartz Filing Type	Filing Description Power of Alty E Sarah LastName (Hedlund Filing Description	Reference Number DJE 1/1 I, Deborah) Reference Number	2 C -
The second secon	Arch 21, 2012 at 2:39 PM by Devon Estes on behalf of Filing Code Affidavit and Order for Dismissal 12-113 - DJE Plaintiff Biz Pro S arch 15, 2012 at 11:43 AM by Devon Estes on behalf of Filing Code Amended Petition	Mark Schwartz Filing Type EFile Contemportation of the schwartz Filing Type EFileAndServe	Filing Description Power of Alty E Sarah LastName (Hedlund Filing Description amended pet	Reference Number DJE 1/1 I, Deborah) Reference Number 1/3 EFS	
Accepted ase # 27-CV revelope # 4595 filed M status Rejected tejected	Affidavit and Order for Dismissal Affidavit and Order for Dismissal	Mark Schwartz Filing Type EFile Ce Civ Discrim vs DJ (Mark Schwartz Filing Type EFileAndServe EFile	Filing Description Power of Alty E Sarah LastName (Hedlund Filing Description amended pet notice of withdrawal of counsel	Reference Number DJE 1/1 I, Deborah) Reference Number 1/3 EFS 2/3 EFO	#C •

Figure 9.2 – Filing Screen

- 2. Locate your case on the Filings screen.
- 3. Click the *icon* for the details of the envelope you want to view.

This action opens the **Envelope Details** window. Here, you can view the **Case Information**, the **Fees**, the **Payment** information, the **Service** type, the case type, and the documents attached to the case. **()** Note: If the Service check box was selected during the filing process, the type of service is displayed.

ata	•
Case Information	on
Location Date Filed Case Number	Hennepin Civil 27-CV-12-113
Case Description Assigned to Judge	DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName Hedlund, Deborah
Attorney	Mark Schwartz
Filed By	Tyler TechTest
Fees	
Convenience Fee Total Court Case Fees Total Court Filing Fees Total Filing & Service Fee Grand Total	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00
Payment	
Account Name Transaction Amount Transaction Response Transaction ID Order ID	Waive Account \$0.00
Service Only	
Filing Type Filing Code Filing Description Reference Number Comments Countesy Copies	Serve Service Only Civil Discrimination Henn DJE Civil Service Waiver no fees
Foor	
Court Fee	to no.

Figure 9.3 – Envelope Details Screen

4. Click the **Print Preview** button to open a printable version of the envelope details, or click the **Close** button when you are done to take you back to the **Filings** screen.

10 My Account

Topics Covered in this Chapter

- Changing the User Password
- Changing the Security Question

The My Account page displays the Change Password and the Manage Notifications tabs.

You can change your password and your security question using the Login - Change Password form.

You can manage the e-mail notifications that you wish to receive using the Manage Notifications tab.

Changing the User Password

File & Serve allows the user to change their password using the Login – Change Password screen.

Change Password	
Login - Change Password	
Your password is case sensitive, must be at least 6 characters, and should not contain spaces or special characters	k.
Old Password	
New Password	
Re-enter New Password	
Security Question	
Security Answer	
Cancel Save	
we 40.4 Login Change Decovered Server	-

Figure 10.1 – Login – Change Password Screen

• Note: Your password is case sensitive and must be at least six characters in length.

Perform the following steps to change the user password:

1. Click the MY ACCOUNT link at the top of the page.

The Change Password Tab opens the Login – Change Password screen.

2. Complete the Login – Change Password form by entering your account information.

• Note: You can unlock your account by using the Forgot Password? option, resetting your password without having to contact the Firm Administrator if a security question is associated with the account.

3. Click **Save** to change your password, or click **Cancel** to exit without changing your password.

Changing the Security Question

File & Serve allows users to change their security question.

Change Password
Login - Change Password
Your password is case sensitive, must be at least 6 characters, and should not contain spaces or special characters
Old Password
New Password
Re-enter New Password
Security Question
number of kids
Security Answer
Cancel Save

Figure 10.2 – Change the Security Question

Perform the following steps to change the security question:

1. Click the MY ACCOUNT link at the top of the page.

The Change Password tab opens the Login – Change Password screen.

- 2. Change your security question and answer by entering your new information in the **Security Question** and **Security Answer** fields.
- 3. Click **Save** to change your password, or click **Cancel** to exit without changing your password.

11 Bookmarks

The **Bookmark** screen displays a list of case numbers and descriptions for the cases you have bookmarked. Only you and your firm (depending on the firm setup) may see this information. Neither the public nor any other firm will be able to see your case list.

View Bookmarked Cases

You can view a list of your bookmarked cases, file into existing case, or remove the bookmarked case from the case list using the **Bookmarks** screen.

Refreshing the Bookmarked Cases List

You can manually refresh the **Bookmarks** screen as changes are made to the system. Click the **Refresh** button to refresh the **Bookmarks** page.

Filing into an Existing Case

Click the **L** icon under the **Actions** column on the **Bookmarks** screen when filing into an existing case, page 33.

Removing a Case from the Bookmark List

You can remove a case from the bookmarked case list by clicking the icon under the **Actions** column on the **Bookmarks** screen.

12 Filings

Topics Covered in this Chapter

- Filtering the Filings Queue
- Exporting E-filing Transactions
- Copying the Envelope
- Adding Service Contacts to the Firm
- Resuming the Filing Process
- Canceling a Filing

After you have uploaded and submitted your filing, File & Serve displays the **Filings** queue. From here, you can view the status of your filing, check the filing type, get a document description, see your number assigned to the case, review the details of the case, and cancel a filing.

View Filings

You can access the **Filings** screen after initiating a case, filing into a subsequent case, or by going to the **Filing** screen directly.

Click the **WORKSPACE** link at the top of the page. This will take you to the **Filings** screen.

Use the **Filings** screen to perform many of the tasks associated with e-filing. From the **Filing** screen, you can manage your firm's service contacts on a case, view the details of the case, add subsequent filings to a case, bookmark the case as a frequently accessed case, resume (continue) the filing process of a case saved as a draft, and cancel a filing.

Firm	All Statuses All All Statuses	All Locations	From Date <m d="" yyyy=""> 15 To Date</m>	(Y> 15 Case or Enve	lope Filter Exp
ase # 27-CV-	12-113 - DJE Plaintiff Biz Pro	Se Civ Discrim vs DJ	E Sarah LastName (Hedlund,	Deborah)	X # E = E >
raft # 4501 started Ma	arch 09, 2012 at 12:37 PM by Devon Estes on behalf	of Mark Schwartz			
itatus	Filing Code	Filing Type	Filing Description	Reference Number	
raft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
raft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
ISE # 27-CV-	-12-113 - DJE Plaintiff Biz Pro March 09, 2012 at 12:30 PM by Devon Estes on behal	Se Civ Discrim vs DJ	E Sarah LastName (Hedlund,	Deborah)	98 C 🖿 🛃
ase # 27-CV-	-12-113 - DJE Plaintiff Biz Pro March 09, 2012 at 12:30 PM by Devon Estes on behal	Se Civ Discrim vs DJ	E Sarah LastName (Hedlund,	Deborah)	2å 🖸 🖬 🛃
ase # 27-CV- velope # 4496 filed M	-12-113 - DJE Plaintiff Biz Pro March 09, 2012 at 12:30 PM by Devon Estes on behal Filing Code	Se Civ Discrim vs DJ If of Mark Schwartz Filing Type	E Sarah LastName (Hedlund, Filing Description	Deborah) Reference Number	¥ C = 7
ase # 27-CV- nvelope # 4496 filed M tatus ccepted	-12-113 - DJE Plaintiff Biz Pro Warch 09, 2012 at 12:30 PM by Devon Estes on behal Filing Code Stipulation	Se Civ Discrim vs DJ If of Mark Schwartz Filing Type EFile	E Sarah LastName (Hedlund, Filing Description Stipulation	Deborah) Reference Number civil test file set up	38 G 🖿 🗜
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Figure 12.1 – Filings Screen

Filtering the Filings Queue

The **Filings** queue screen displays the status of each filing. The status information is located in the status column on the **Filings** screen. You will only see the status for the filings that you or your firm have submitted when logged on to the system, not all filings related to a case.

1 Note: Only you and your firm may see this information.

1. Select Filings on the toolbar.

All relevant information is displayed concerning your filings.

2. Select the filter parameters using the drop-down lists, or enter specific information in the search fields.

• Note: For the From Date or the To Date, click the 15 icon to select dates from a calendar, or you can type the dates manually (for example, 9/9/2010).

From Date	<m 0<="" th=""><th>l/yyy</th><th>/y></th><th>15</th><th>То</th><th>Dat</th><th>e < </th><th>M/d/yyyy> 15</th></m>	l/yyy	/y>	15	То	Dat	e <	M/d/yyyy> 15
	•	0	cto	ber,	201	1	•	
	Su	Мо	Tu	We	Th	Fr	Sa	
ckson	25	26	27	28	29	30	1	
•	2	3	4	5	6	7	8	R
	9	10	11	12	13	14	15	1
	16	17	18	19	20	21	22	
	23	24	25	26	27	28	29	1
	30	31	1	2	3	4	5	



3. Click **Filter** to filter the search.

FILINGS BOOKMARKS TEN	IPLATES SERVICE CONTACTS				
My Firm 🔹	All Statuses All Location	ns	te <m d="" yyyy=""> 15 To Date <m d="" yyyy=""> 1</m></m>	5 Case or Envelope	Filter Export
Case # 27-CV-12-113	- DJE Plaintiff Biz Pro Se Ci	v Discrim vs DJE Sar	ah LastName (Hedlund, Deb	oorah)	***
Draft # 4501 started March 09, 201	2 at 12:37 PM by Devon Estes on behalf of Mark S	chwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Case # 27-CV-12-113 Envelope # 4496 filed March 09, 20 Status	- DJE Plaintiff Biz Pro Se Ci 112 at 12:30 PM by Devon Estes on behalf of Mark Filing Code	v Discrim vs DJE Sar Schwartz Filing Type	rah LastName (Hedlund, Deb	Reference Number	
Accepted	Stipulation	EFile	Stipulation	civil test file set up	
Case # 27-FA-12-25 -	()				2 C 🖿 🛃
Envelope # 4494 filed March U9, 20	12 at 12:04 PM by Devon Estes on behalf of Beth I	Lewandowski	Filing Description	Deference Number	
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3	
Rejected	Petition for Review of Decision of Court of Appe	EFileAndServe	DJE Petition for Review of Decision of Court of.	Filing 2/3	-
		┥ ┥ 1 of 5	▶ ▶I		

Figure 12.3 – Filings Screen

1 Note: To clear the filter, select Filings on the toolbar.

File & Serve displays a list of cases meeting your search criteria.

Exporting E-filing Transactions

You can export a copy of the filings in the **Filings** queue to your computer using the **Export** option in File & Serve.

/ Firm	All Statuses All	Locations •	From Date </th <th>d/yyyy> 15 Case or Envel</th> <th>ope Filter Exp</th>	d/yyyy> 15 Case or Envel	ope Filter Exp
Case # 27-CV-12	-113 - DJE Plaintiff Biz Pro S	e Civ Discrim vs DJ	JE Sarah LastName (Hedlun	id, Deborah)	X 28 C = 2 >
Draft # 4501 started March	09, 2012 at 12:37 PM by Devon Estes on behalf of	Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
ase # 27-CV-12	-113 - DJE Plaintiff Biz Pro S	e Civ Discrim vs DJ	JE Sarah LastName (Hedlun	id, Deborah)	22 C 🖿 🛃
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Figure 12.4 – Filings Screen

Perform the following steps to export a copy of your filings to your computer:

- 1. Select the **Filings** tab on the toolbar.
- 2. Click the **Export** button.

The Windows Explorer window opens on your screen. This will allow you to export your filings to a Microsoft Office XML file.

Save As					
Colore i Pham Steven + Downloads	 * * Search Downloads 	٩			
Organize + New folder		5 · 0	a norman a state of the second		
🛠 Favorites	No items match your search.		From Date =M/d/yyyy= 35 To Date	Case Number	Fitter
E Desktop					
S Downloads					
22 Necent Places			ling Description	Reference Number	
E Desktop			st financial	1	
Cip Libraries			at fin filing 2	2	
Documents			and the second se		
E Pictures			Brickhouse, Beatrice)		
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B Pham, Steven			ting Description	Reference Number	
Contacts +			AT dock	1	
Electron Statement					
She at here VM Elec					
and a Dire laure rate			ling Description	Reference Number	
Querta	Seve	Cancel	I dollar optional fee	acit	

Figure 12.5 – Windows Explorer

3. Type a file name in the File name field provided.

File name:			•
Figure 12.	6 – File Nam	e Field	
Click the	Save	button to save the filings to your computer, or click the	Cancel
to cancel.			00000

File & Serve saves the files to your computer.

Viewing the Export File

4.

Once the file has been exported, navigate to the location where the file was saved and open the file. Depending on what operating system (Windows or Mac) and programs installed on your computer, your options here will vary. If Microsoft Excel (or a similar application) is installed on your computer, using it is the simplest way to view the data.

When the XML file is opened, there will be two worksheets – one named Envelopes and one named Filings. Most users find the Envelopes worksheet easier to use for reconciliation of credit card statements, as the Filings worksheet will contain multiple rows of data for envelopes created with multiple filings. Currently, the Export contains the following fields in the Envelopes worksheet: Order ID, Case, Case Description (Case Style), Filed Date, Court Fee, Service Fee, Convenience Fee, Total Fee, Response, Capture Date, Accept Date, Account, Responsible Party, Envelope #, Reference Number.

Using Microsoft Excel (or a similar application) provides the ability to sort, filter, and total data exported. Once the data has been sorted and filtered as appropriate, the 'Total Fee' column can be totaled using a formula. The Reference Number field is designed to be a way to link the client file in your office back to the e-filings created in File & Serve. When e-filing a document and using the Reference Number in this manner, it will assist in assist in reconciliation of charges to client files.

Copying the Envelope

You can copy an envelope to create another envelope using the L icon on the **Filings** screen if your filing has been rejected by the courts. You can also copy the envelope if there is an error in your filing and you want to create another filing.

Perform the following steps to copy the envelope:

1. Click the **Filings** link on the menu.

/ Firm	 All Statuses 	All Locations	From Date <m d="" yyyy=""> 15 To Date <m <="" th=""><th>(d/yyyy> 15 Case or Envelope</th><th>Filter Exp</th></m></m>	(d/yyyy> 15 Case or Envelope	Filter Exp
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Draft # 4501 started Ma	arch 09, 2012 at 12:37 PM by Devon	Estes on behalf of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affi	davit EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Case # 27-CV-	-12-113 - DJE Plaintin	ff Biz Pro Se Civ Discrim vs D.	JE Sarah LastName (Hedlu	nd, Deborah)	24 🖸 🖿 📕
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Case # 27-CV- Envelope # 4496 filed I Status Accepted Case # 27-FA- Envelope # 4494 filed I Status Accepted	12-113 - DJE Plaintif March 09, 2012 at 12:30 PM by Devo Filing Code Stipulation 12-25 - () March 09, 2012 at 12:04 PM by Devo Filing Code Petition for Custody	ff Biz Pro Se Civ Discrim vs D. n Estes on behalf of Mark Schwarz Filing Type EFile n Estes on behalf of Beth Lewandowski Filing Type EFile	JE Sarah LastName (Hedlun Filing Description Stipulation Filing Description DJE Pet for Cust EFO	nd, Deborah) Reference Number civil test file set up Reference Number Filing 1/3	# C • .

Figure 12.7 – Filings Screen

- 2. Select a case to copy on the Filings screen.
- 3. Click the 🛄 icon on the selected case to copy the envelope.

Adding Service Contacts to the Firm

You can add service contacts to the Service Contacts list.

Perform the following steps to add service contacts to the Service Contacts list:

1. Click the SERVICE CONTACTS link at the top of the window.

This opens the Service Contacts page.

INGS BOOKMARKS TEMPLA	TES REVIEW QUEUE REVIEW	VHISTORY SERVICE CONTACTS		
Name		Email		
eter Chainst		pchainst@motorsports.com	C = 7 ×	
evin James Hines		kjhines@connerlaw.com	E 目 つ X	
ohannson Slovaskey		jslovskey@gexxa.com	C E O X	
licky John Bourdeaux		rbourdeaux@jonesllp.com		
				J
lad New				
First Name*	Middle	Last Name*		
Ricky	John	Bourdeaux		
Email*	Administrative Copy 🥡	Firm Name		
rbourdeaux@jonesllp.com	amanda@jonesllp.com	Jones LLP		
Address		City		
9989 S. Bay Blvd.		Carson City		
State	Zip Code			
Delaware	· 11121			
Phone				
909-344-4455				
Make this contact Public ?				
		Save Cont	act	

Figure 12.8 – Adding Service Contacts Form

2. Click the Add New button in the middle of the window.

File & Serve displays the **Add Service Contacts** form.

3. Complete the Add Service Contacts form by providing the applicable information.

Note: An asterisk (*) indicates required information.

4. Type an e-mail address in the Administrative Copy field.

A courtesy copy of the service notification is sent to the e-mail address entered in this field. The administrative e-mail is an optional e-mail for the delivery of service. Delivery to this address is not considered a determining factor for the completion of e-service.

5. Select the Make this contact Public check box to make the contact available to any filer.

1 Note: Selecting this check box is helpful when the contact is the defendant in a court action.

6. Click the Save button to save the contact to the Service Contacts list.

The new contact information displays in the **Service Contact** list.

Resuming the Filing Process

You can resume the filing process after logging out of the system or exiting the filing process by accessing your case using the **Filings** link to access the **Filings** screen.

BOOKMAR					
Firm	▼ All Statuses ▼	All Locations	From Date </th <th>/d/yyyy> 15 Case or Envelop</th> <th>Filter Exp</th>	/d/yyyy> 15 Case or Envelop	Filter Exp
ase # 27-CV	-12-113 - DJE Plaintiff Biz Pl	ro Se Civ Discrim vs DJ	E Sarah LastName (Hedlu	nd, Deborah)	X ≠ E = E >
Draft # 4501 started Ma	arch 09, 2012 at 12:37 PM by Devon Estes on bel	half of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
)raft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Iraft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
ase # 27-CV	-12-113 - D.IF Plaintiff Biz P	ro Se Civ Discrim vs D.I	F Sarah LastName (Hedlu	nd Deborah)	
ase # 27-CV	-12-113 - DJE Plaintiff Biz Pl March 09, 2012 at 12:30 PM by Devon Estes on b	ro Se Civ Discrim vs DJ	E Sarah LastName (Hedlu	nd, Deborah)	2ª C 🖿 🛛
ase # 27-CV	-12-113 - DJE Plaintiff Biz P March 09, 2012 at 12:30 PM by Devon Estes on b Filing Code	ro Se Civ Discrim vs DJ ehalf of Mark Schwartz Filing Type	E Sarah LastName (Hedlu Filing Description	nd, Deborah)	98 C 🖿 .
ase # 27-CV- nvelope # 4496 filed I tatus ccepted	-12-113 - DJE Plaintiff Biz P March 09, 2012 at 12:30 PM by Devon Estes on b Filing Code Stipulation	ro Se Civ Discrim vs DJ ehalf of Mark Schwartz Filing Type EFile	E Sarah LastName (Hedlu Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	94 C 🖿 🗖
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ase # 27-CV- nvelope # 4496 filed 1 tatus ccepted ase # 27-FA- nvelope # 4494 filed 1 tatus	H2-113 - DJE Plaintiff Biz Planch 09, 2012 at 12:30 PM by Devon Estes on b Filing Code Stipulation H2-25 - () Harch 09, 2012 at 12:04 PM by Devon Estes on b Filing Code	ro Se Civ Discrim vs DJ ehalf of Mark Schwartz Filing Type EFile ehalf of Beth Lewandowski Filing Type	E Sarah LastName (Hedlu Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up Reference Number	<u></u> * C = 7
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Figure 12.9 – Filings Screen

Perform the following steps to resume the filing process on the case:

- 1. Select Filings on the toolbar.
- 2. Select a case or an envelope on the Filings screen to resume a filing.
- 3. Click the local icon for the selected case to resume the filing process. This opens the last saved pages in your envelope or case to continue the filing process.

Canceling a Filing

You can cancel a filing you have submitted before it is accepted by the courts. Once the filing status changes to "Under Review" or "Accepted," a filing cannot be canceled.

/ Firm	All Statuses All	Locations •	From Date <m d="" yyyy=""> To Date <m d<="" th=""><th>d/yyyy> 15 Case or Envelop</th><th>e Filter Exp</th></m></m>	d/yyyy> 15 Case or Envelop	e Filter Exp
ase # 27-CV-	12-113 - DJE Plaintiff Biz Pro S	Se Civ Discrim vs DJ	E Sarah LastName (Hedlun	id, Deborah)	X 24 🖸 🖿 🖬 🕨
Draft # 4501 started Ma	irch 09, 2012 at 12:37 PM by Devon Estes on behalf of	Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
)raft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
ase # 27-CV-	12-113 - DJE Plaintiff Biz Pro S	e Civ Discrim vs DJ	E Sarah LastName (Hedlun	id, Deborah)	28 E 🖿 🖬
ase # 27-CV-	12-113 - DJE Plaintiff Biz Pro S	Se Civ Discrim vs DJ	E Sarah LastName (Hedlun	id, Deborah)	5ª C 🖿 🖬
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ase # 27-CV- Envelope # 4496 filed M Status Accepted	12-113 - DJE Plaintiff Biz Pro S farch 09, 2012 at 12:30 PM by Devon Estes on behalf Filing Code Stipulation	Se Civ Discrim vs DJ of Mark Schwartz Filing Type EFile	E Sarah LastName (Hediun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	¥ C = 2
ase # 27-CV- Envelope # 4496 filed M Status Accepted	12-113 - DJE Plaintiff Biz Pro S Aarch 09, 2012 at 12:30 PM by Devon Estes on behalf Filing Code Stipulation 12-25 - ()	Se Civ Discrim vs DJ of Mark Schwartz Filing Type EFile	E Sarah LastName (Hedlun Filing Description Stipulation	id, Deborah) Reference Number civil test file set up	2 C . .
ase # 27-CV- invelope # 4496 filed N Status Accepted ase # 27-FA- Envelope # 4494 filed N	12-113 - DJE Plaintiff Biz Pro S March 09, 2012 at 12:30 PM by Devon Estes on behalf of Filing Code Stipulation 12-25 - () March 09, 2012 at 12:04 PM by Devon Estes on behalf	Se Civ Discrim vs DJ of Mark Schwartz Filing Type EFile	E Sarah LastName (Hedlun Filing Description Stipulation	Id, Deborah) Reference Number civil test file set up	2 () () 2 () () () () () () () () () (
ase # 27-CV- invelope # 4496 filed M itatus incorpted ase # 27-FA- invelope # 4494 filed M itatus	12-113 - DJE Plaintiff Biz Pro S farch 09, 2012 at 12:30 PM by Devon Estes on behalf Filing Code Stipulation 12-25 - () farch 09, 2012 at 12:04 PM by Devon Estes on behalf of Filing Code	Se Civ Discrim vs DJ of Mark Schwartz Filing Type EFile of Beth Lewandowski Filing Type	E Sarah LastName (Hedlun Filing Description Stipulation Filing Description	Id, Deborah) Reference Number civil test file set up Reference Number	3 C = .
ase # 27-CV- invelope # 4496 filed M intus inccepted ase # 27-FA- invelope # 4494 filed M intus inccepted	12-113 - DJE Plaintiff Biz Pro S Aarch 09, 2012 at 12:30 PM by Devon Estes on behalf Filing Code Stipulation 12-25 - () filing Code Filing Code Petition for Custody	Se Civ Discrim vs DJ of Mark Schwartz Filing Type EFrie of Beth Lewandowski Filing Type EFrie	E Sarah LastName (Hedlun Filing Description Stipulation Filing Description DJE Pet for Cust EFO	Reference Number civil test file set up Reference Number Filing 1/3	3 C = .
Case # 27-CV- Envelope # 4496 filed h Status Accepted Case # 27-FA- Envelope # 4494 filed h Status Accepted Rejected	12-113 - DJE Plaintiff Biz Pro S Aarch 09, 2012 at 12:30 PM by Devon Estes on behalf Filing Code Stipulation 12-25 - () Aarch 09, 2012 at 12:04 PM by Devon Estes on behalf Filing Code Petition for Custody Petition for Review of Decision of Court of	Se Civ Discrim vs DJ of Mark Schwartz Filing Type EFile of Beth Lewandowski Filing Type EFile (Appe EFileAndServe	E Sarah LastName (Hedlun Filing Description Stipulation Filing Description DJE Pet for Cust EFO DJE Petiton for Review of Decision o	Reference Number civil test file set up Reference Number Filing 1/3 of Court of Filing 2/3	3 C • .

Figure 12.10 – Filings Screen

Perform the following steps to cancel the filing:

- 1. Click Filings on the toolbar.
- 2. Select a case or an envelope on the Filings screen to cancel.
- 3. Click the Sicon for the selected case to cancel the filing.

13 Service Contacts

Topics Covered in this Chapter

- Adding Service Contacts to a Case
- Viewing the Service Contact Details
- Viewing the Attached Cases List
- Replacing Service Contacts on the Case
- Deactivating a Service Contact on the Case

You can add service contacts to the case using the Service Contacts link.

Adding Service Contacts to a Case

You can add service contacts to a case.

Perform the following steps to add a service contact to a case:

1. Click the **WORKSPACE** link at the top of the screen.

This action opens the Filings window.

ILINGS BOOKMAR	RKS TEMPLATES SERVICE	CONTACTS			
/ly Firm	✓ All Statuses	All Locations	From Date K/d/yyyy> 15 To Date	d/yyyy> 15 Case or Envelope	Filter Export
Case # 27-CV	-12-113 - DJE Plaintiff	Biz Pro Se Civ Discrim vs D.	JE Sarah LastName (Hedlun	ıd, Deborah)	X # E = E >
Draft # 4501 started M	arch 09, 2012 at 12:37 PM by Devon E	stes on behalf of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affida	wit EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Envelope # 4496 filed Status	March 09, 2012 at 12:30 PM by Devon Filing Code	Estes on behalf of Mark Schwartz Filing Type	Filing Description	Reference Number	
Status Accepted	Filing Code Stipulation	Filing Type EFile	Filing Description Stipulation	civil test file set up	
Case # 27-FA-	-12-25 - ()				¥ C • 2
Envelope # 4494 filed	March 09, 2012 at 12:04 PM by Devon	Estes on behalf of Beth Lewandowski			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3	
Rejected	Petition for Review of D	ecision of Court of Appe EFileAndServe	DJE Petition for Review of Decision of	of Court of Filing 2/3	
		[4] 4	1 of 5 🕨 🕨		

Figure 13.1 – Filings Window

- 2. Locate the case that you want to add service contacts.
- 3. Click the ¹³ icon to add a service contact to the selected case.

This opens the Manage Case Service Contacts window.

berendenti duding test party	party	
Plaintiff: testing adding addt	party	
Other Service Contacts		
Jameson Aurther Westinghous	se (jaw@rawitserlaw.com)	
Adam Record (aefstest6@gma	ail.com)	
Adam Smith (aefstest2@gmai	l.com)	C 🗏 🗹 🗙
New Service contact contact T		
s p (steven.pham@tylertech.c	com)	
tamasha Anderson (Anderson	@testingtw.com)	
Tamasha motor (tamashatest	@gmail.com)	
Tim Thompson (werwer@test	com)	
dd New Add From Master List	Add From Public List Show Histo	
First Name*	Middle	Last Name*
Email*	Administrative Copy	Firm Name
iaw@rawitserlaw.com	kathy@rawitserlaw.com	Rawitser Law Firm
Address		City
7977 E. Frankford Way		Mountain City
State	Zip Code	
	 112123 	
Alaska		
Alaska Phone () (xxx)xxx-xxxx		

Figure 13.2 – Manage Case Service Contacts Window

4. Select the name of the service contact to add to the case, or click the Add New button in the middle of the window to add a new service contact.

File & Serve displays the add service contact fields.

5. Complete the add service contact fields by providing the applicable information.

1 Note: An asterisk (*) indicates required information.

6. Type an e-mail address in the Administrative Copy field.

The administrative e-mail is an optional additional e-mail for the delivery of service. Delivery to this address is not considered a determining factor for the completion of e-service.

- 7. Select the Make this contact Public check box to make the contact public.
- 8. Select the **Save Contact in My Firm Master Service List** check box to save the contact to the firm's master service list.
- 9. Click the **Save** button to save the contact.

Adding Service Contacts from Master List

You can add service contacts to the Case Service Contacts list from the Master List.

Perform the following steps to add service contacts to the Case Service Contacts list:

1. Click the **WORKSPACE** link at the top of the screen.

This action opens the Filings window.

BOOKMARKS					
/ Firm	▼ All Statuses ▼	All Locations	From Date	d/yyyy>	Filter Expo
Case # 27-CV-1	2-113 - DJE Plaintiff Biz Pr	o Se Civ Discrim vs DJ	E Sarah LastName (Hedlun	ld, Deborah)	× # @ =
Draft # 4501 started March	h 09, 2012 at 12:37 PM by Devon Estes on beha	alf of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Case # 27-CV-1	2-113 - DJE Plaintiff Biz Pr	o Se Civ Discrim vs DJ	E Sarah LastName (Hedlun	nd, Deborah)	38 C 🖿 🗖
Case # 27-CV-12	2-113 - DJE Plaintiff Biz Pr	TO SE Civ Discrim vs DJ	E Sarah LastName (Hedlun	ıd, Deborah)	¥ C 🖿 🖡
Case # 27-CV-1; Envelope # 4496 filed Mar Status	2-113 - DJE Plaintiff Biz Pr rch 09, 2012 at 12:30 PM by Devon Estes on be Filing Code Structure	o Se Civ Discrim vs DJ shalf of Mark Schwartz Filing Type	E Sarah LastName (Hedlun Filing Description	nd, Deborah) Reference Number	38 C 🖿 🛃
Case # 27-CV-1: Envelope # 4496 filed Mar Status Accepted	2-113 - DJE Plaintiff Biz Pr rch 09, 2012 at 12:30 PM by Devon Estes on be Filing Code Stipulation	o Se Civ Discrim vs DJ half of Mark Schwartz Filing Type EFile	E Sarah LastName (Hedlun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	34 G 🖿 📕
Case # 27-CV-12 Envelope # 4496 filed Mar Status Accepted Case # 27-FA-12	2-113 - DJE Plaintiff Biz Pr rch 09, 2012 at 12:30 PM by Devon Estes on be Filing Code Stipulation 2-25 - ()	o Se Civ Discrim vs DJ half of Mark Schwartz Filing Type EFile	E Sarah LastName (Hedlun Filing Description Stipulation	Id, Deborah) Reference Number civil test file set up	2 C
Case # 27-CV-12 Envelope # 4496 filed Mar Status Accepted Case # 27-FA-12 Envelope # 4494 filed Mar	2-113 - DJE Plaintiff Biz Pr rch 08, 2012 at 12:30 PM by Devon Estes on be Filing Code Stipulation 2-25 - () rch 09, 2012 at 12:04 PM by Devon Estes on be	o Se Civ Discrim vs DJ half of Mark Schwartz Filing Type EFile	E Sarah LastName (Hedlun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	# C = .
Case # 27-CV-12 Envelope # 4496 filed Mar Status Accepted Case # 27-FA-12 Envelope # 4494 filed Mar Status	2-113 - DJE Plaintiff Biz Pr rch 06, 2012 at 12:30 PM by Devon Estes on be Filing Code Stipulation 2-25 - () rch 09, 2012 at 12:04 PM by Devon Estes on be Filing Code	o Se Civ Discrim vs DJ half of Mark Schwartz Filing Type EFile half of Beth Lewandowski Filing Type	E Sarah LastName (Hedlun Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up Reference Number	3 C
Case # 27-CV-1: Envelope # 4496 filed Mar Status Accepted Case # 27-FA-12 Envelope # 4494 filed Mar Status Accepted	2-113 - DJE Plaintiff Biz Pr rch 09, 2012 at 12:30 PM by Devon Estes on be Filing Code Stipulation 2-25 - () rch 09, 2012 at 12:04 PM by Devon Estes on be Filing Code Petition for Custody	o Se Civ Discrim vs DJ half of Mark Schwartz Filing Type EFile half of Beth Lewandowski Filing Type EFile	E Sarah LastName (Hedlun Filing Description Stipulation Filing Description DJE Pet for Cust EFO	Id, Deborah) Reference Number civil test file set up Reference Number Filling 1/3	2 C
Case # 27-CV-1; Envelope # 4406 filed Mar Status Accepted Case # 27-FA-12 Envelope # 4404 filed Mar Status Accepted Rejected	2-113 - DJE Plaintiff Biz Pr rch 09, 2012 at 12:30 PM by Devon Estes on be Filing Code Stipulation 2-25 - () rch 09, 2012 at 12:04 PM by Devon Estes on be Filing Code Petition for Custody Petition for Review of Decision of Co	ball of Mark Schwartz Filing Type EFile thail of Beth Lewandowski Filing Type EFile but of Appe EFileAndServe	E Sarah LastName (Hedlun Filing Description Stipulation Filing Description DJE Pet for Cust EFO DJE Petition for Review of Decision of	rd, Deborah) Reference Number civil test file set up Reference Number Filing 1/3 of Court of. Filing 2/3	₽ C ■ 2

Figure 13.3 – Filings Window

- 2. Locate the case that you want to add the service contact to.
- 3. Click the service contact information.

This opens the Manage Case Service Contacts window.

Defendent: adding test party pa	arty	
Plaintiff: testing adding addtl p	arty	
Other Service Contacts		
Jameson Aurther Westinghouse	(jaw@rawitserlaw.com)	
Adam Record (aefstest6@gmail.	.com)	C 🗏 🗹 🗙
Adam Smith (aefstest2@gmail.c		
New Service contact contact Tes		
s p (steven.pham@tylertech.cor		
tamasha Anderson (Anderson@		
Tamasha motor (tamashatest@		
Tim Thompson (werwer@test.co		
First Name*	Middle	Last Name*
- Hot Hume	Aurther	Westinghouse
Jameson		
Jameson Email*	Administrative Copy (j)	Firm Name
Jameson Email* jaw@rawitserlaw.com	Administrative Copy 🥡 kathy@rawitserlaw.com	Firm Name Rawitser Law Firm
Jameson Email* Jaw@rawitserlaw.com Address	Administrative Copy (j) kathy@rawitserlaw.com	Firm Name Rawitser Law Firm City
Jameson Email* jaw@rawitserlaw.com Address 7977 E. Frankford Way	Administrative Copy (j) kathy@rawitserlaw.com	Firm Name Rawitser Law Firm City Mountain City
Jameson Email* Jaw@rawitserlaw.com Address 7977 E. Frankford Way State	Administrative Copy (i) kathy@rawitserlaw.com	Firm Name Rawitser Law Firm City Mountain City
Jameson Email* Jaw@rawitserlaw.com Address 7977 E. Frankford Way State Alaska Phone ()	Administrative Copy () kathy@rawitserlaw.com Zlp Code 112123	Firm Name Rawitser Law Firm City Mountain City
Jameson Email* Jaw@rawitserlaw.com Address 7977 E. Frankford Way State Alaska Phone () (xxx)xxx-xxxx	Administrative Copy () kathy@rawitserlaw.com Zlp Code 112123	Firm Name Rawitser Law Firm City Mountain City

Figure 13.4 – Manage Case Service Contacts Window

4. Click the Add From Master List button.

This action opens the Add Service Contact form from Master List window.

Add Service Contact fr	om Master List				23
Firm Service Co	ntacts		Case Service C	ontacts	
Name	Email		Name	Email	
Swinn Alberstein	swstein@ganesllp.com	d	Blu Ivy	Blulvy@Dynasty.org	d
Christian Dior	Dior@Christian.com	C	Denim Jeans	JDenim@tylertech.com	
Eloquint Intellect	EI@TT.com	G	August 14th sue	81412@august.com	d
636		Ad	d >		
		< Rei	move		
lor					l o
635					

Figure 13.5 – Add Service Contact from Master List Window

- 5. Select the service contact from the Firm Service Contacts list.
- 6. Click the Add > button to add the service contact to the Case Service Contacts list.

The new contact information displays in the Case Service Contacts list.

- 7. Select a contact from the **Case Service Contacts** list and click the **Remove** button to remove the contact from the **Case Service Contacts** list.
- 8. Click the **Save** button to save the **Case Service Contacts** list.

Adding Service Contacts from Public List

You can add service contacts to the Case Service Contacts list from the public list of contacts.

Perform the following steps to add service contacts to the Case Service Contacts list:

1. Click the **WORKSPACE** link at the top of the screen.

This action opens the Filings window.

BOOKWARK						
y Firm	All Statuses	All Location	s	From Date M/d/yyyy> 15 To Date	d/yyyy> 15 Case or Envelope	Filter Expo
Case # 27-CV-1	I2-113 - DJE Plainti	ff Biz Pro Se Civ	/ Discrim v	s DJE Sarah LastName (Hedlur	nd, Deborah)	X # E >
Draft # 4501 started Mare	ch 09, 2012 at 12:37 PM by Devon	Estes on behalf of Mark Sch	hwartz			
Status	Filing Code		Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Aff	davit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review		EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
200 # 27_CV_1	2-112 - DIE Plainti	ff Biz Bro So Civ		e D IE Sarah I astNamo (Hodiur	Deborah)	
Case # 27-CV-1 Envelope # 4496 filed Ma	12-113 - DJE Plainti arch 09, 2012 at 12:30 PM by Devo	ff Biz Pro Se Civ n Estes on behalf of Mark S	/ Discrim v	s DJE Sarah LastName (Hedlur	nd, Deborah)	28 🖻 🖬 🖬
Case # 27-CV-1 Envelope # 4496 filed Ma Status Accepted	12-113 - DJE Plainti arch 09, 2012 at 12:30 PM by Devo Filing Code Stipulation	ff Biz Pro Se Civ In Estes on behalf of Mark S	/ Discrim v ichwartz Filing Type EFile	s DJE Sarah LastName (Hedlur Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	¥ C 🖿 🗖
Case # 27-CV-1 Envelope # 4496 filed Ma Status Accepted Case # 27-FA-1	12-113 - DJE Plainti arch 09, 2012 at 12:30 PM by Deve Filing Code Stipulation 2-25 - ()	ff Biz Pro Se Civ in Estes on behalf of Mark S	/ Discrim v ichwartz Filing Type EFile	s DJE Sarah LastName (Hedlur Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	<u>* C • .</u>
Case # 27-CV-1 Envelope # 4496 filed Ma Status Accepted Case # 27-FA-1 Envelope # 4494 filed Ma	12-113 - DJE Plainti arch 09, 2012 at 12:30 PM by Devo Filing Code Stipulation 2-25 - () arch 09, 2012 at 12:04 PM by Devo	ff Biz Pro Se Civ In Estes on behalf of Mark S	v Discrim v ichwartz Filing Type EFile ewandowski	s DJE Sarah LastName (Hedlur Filing Description Stipulation	nd, Deborah) Reference Number civil test file set up	
Case # 27-CV-1 Envelope # 4496 filed Ma Status Accepted Case # 27-FA-1 Envelope # 4494 filed Ma Status	12-113 - DJE Plainti arch 09, 2012 at 12:30 PM by Deve Filing Code Stipulation (2-25 - () arch 09, 2012 at 12:04 PM by Deve Filing Code	ff Biz Pro Se Civ in Estes on behalf of Mark S	V Discrim v ichwartz Filing Type EFile ewandowski Filing Type	s DJE Sarah LastName (Hedlur Filing Description Stipulation Filing Description	nd, Deborah) Reference Number civil test file set up Reference Number	
Case # 27-CV-1 Envelope # 4496 filed Ma Status Accepted Case # 27-FA-1 Envelope # 4494 filed Ma Status Accepted	12-113 - DJE Plainti arch 09, 2012 at 12:30 PM by Deve Filing Code Stipulation 12-25 - () arch 09, 2012 at 12:04 PM by Deve Filing Code Petition for Custody	ff Biz Pro Se Cin n Estes on behalf of Mark S n Estes on behalf of Beth Lo	Discrim v chwartz Filing Type EFile ewandowski Filing Type EFile	s DJE Sarah LastName (Hedlur Filing Description Stipulation Filing Description DJE Pet for Cust EFO	nd, Deborah) Reference Number civil test file set up Reference Number Filing 1/3	
Case # 27-CV-1 Envelope # 4496 filed Ma Status Accepted Case # 27-FA-1 Envelope # 4494 filed Ma Status Accepted Rejected	12-113 - DJE Plainti arch 09, 2012 at 12:30 PM by Dev Filing Code Stipulation 12-25 - () Arch 09, 2012 at 12:04 PM by Devc Filing Code Petition for Custody Petition for Review of	ff Biz Pro Se Civ on Estes on behalf of Mark S n Estes on behalf of Beth Lo Decision of Court of Appe	/ Discrim v chwartz Filing Type EFile ewandowski Filing Type EFile EFile EFileAndServe	S DJE Sarah LastName (Hedlur Filing Description Stipulation Filing Description DJE Pet for Cust EFO DJE Petition for Review of Decision of	rd, Deborah) Reference Number civil test file set up Reference Number Filing 1/3 of Court of. Filing 2/3	<u>* C • .</u>

Figure 13.6 – Filings Window

- 2. Locate the case that you want to add the service contact to.
- 3. Click the service contact information.

This opens the Manage Case Service Contacts window.

Defendent: adding test party party	,	
Plaintiff: testing adding addtl part	v	
▲ Other Service Contacts	-	
Jameson Aurther Westinghouse (ja	w@rawitserlaw.com)	
Adam Record (aefstest6@gmail.com	n)	
Adam Smith (aefstest2@gmail.com		
New Service contact contact Testing		
s p (steven.pham@tylertech.com)		
tamasha Anderson (Anderson@test	ingtw.com)	
Tamasha motor (tamashatest@gma	ill.com)	
Tim Thompson (werwer@test.com)		
dd New Add From Master List A	dd From Public List Show History	
First Name*	Middle	Last Name*
Jameson	Aurther	Westinghouse
Email*	Administrative Copy (i)	Firm Name
jaw@rawitserlaw.com	kathy@rawitserlaw.com	Rawitser Law Firm
Address		City Mountain City
State	Zin Code	Hountain City
Alaska	112123	
Phone (i)		
Phone (i) (xxx)xxx-xxxx		
Phone (i) (xxx)xxx-xxxx Make this contact Public		

Figure 13.7 – Manage Case Service Contacts Window

4. Click the Add From Public List button.

This action opens the Add Service Contact from Public List window.

Add Service Contact	from Public List										2
First Name	Last N	ame		Em	ail		Firm		Sea	rch C	lear
Search Result	S					Case Serv	ice Co	ontacts			
Name	Email	Firm				Name		Email	Firm		
aa	steven.pham@tylertec .com	hTyler Tech System August	d	^		kathy D		kdonovan@courts.mi.go v	Tyler Tech Sy August	stem	q
Rob Adkins	robert.adkins@tylertec .com	^h Robert Adkins	d			Denise D		ddevine@courts.mi.gov	Tyler Tech Sy August	stem	q
Swinn Alberstein	swstein@ganesllp.com	Tyler Tech System August	d		Add >	b b		b@mail.com	Tyler Tech Sy August	stem	q
Contact August	Contact@august.com	Aust 14	q			new 1		new1@email.com	Tyler Tech Sy	stem	q
Master 1 August 14th	August14th@hotmail.c om	Aust 14	d		< Remove				August		
bb	b@mail.com	Tyler Tech System August	d								
cc	c@mail.com	Tyler Tech System August	d								
		Tuler Tech Svetem		•							

Figure 13.8 – Add Service Contact from Public List Window

- 5. Enter the name, e-mail address, or firm name in the fields provided, and then click the **Search** button to search for a specific service contact, or click the **Search** button to display all service contacts available.
- 6. Select the service contact from the Search Results list.
- 7. Click the Add > button to add the service contact to the Case Service Contacts list.

The new contact information displays in the Case Service Contacts list.

- 8. Select a contact from the **Case Service Contacts** list and click the **Remove** button to remove the contact from the **Case Service Contacts** list.
- 9. Click the **Save** button to save the **Case Service Contacts** list.

Viewing Service Contacts History

You can view the history of the service contacts attached to a case.

Perform the following steps to view the service contact's history:

1. Click the **WORKSPACE** link at the top of the screen.

This action opens the Filings window.

LINGS BOOKMARK	S TEMPLATES SERVICE CONTACTS				
1y Firm	All Statuses All All Statuses	All Locations	From Date	Case or Envelo	pe Filter Export
Case # 27-CV-1	2-113 - DJE Plaintiff Biz Pro	Se Civ Discrim vs DJB	E Sarah LastName (Hedlund, D	Deborah)	×≠∈ = = >
Draft # 4501 started Marc	ch 09, 2012 at 12:37 PM by Devon Estes on behalf of	of Mark Schwartz			
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3	0
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS	0
Envelope # 4496 filed Ma Status	rch 09, 2012 at 12:30 PM by Devon Estes on behal Filing Code	f of Mark Schwartz Filing Type	Filing Description	Reference Number	
Envelope # 4496 filed Ma Status	rch 09, 2012 at 12:30 PM by Devon Estes on behal Filing Code	f of Mark Schwartz Filing Type	Filing Description	Reference Number	
Accepted	Stipulation	EFile	Stipulation	civil test file set up	
Case # 27-FA-1	2-25 - ()	f of Reth Lewandowski			# C 🖿 🖬
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3	
Rejected	Petition for Review of Decision of Court	of Appe EFileAndServe	DJE Petition for Review of Decision of Court	t of . Filing 2/3	

Figure 13.9 – Filings Window

- 2. Locate the case that you want to view the contact's service history.
- 3. Click the service contact information.

This opens the Manage Case Service Contacts window.

	arty	
Plaintiff: testing adding addtl p	party	
Other Service Contacts		
Jameson Aurther Westinghouse	(jaw@rawitserlaw.com)	
Adam Record (aefstest6@gmail	.com)	
Adam Smith (aefstest2@gmail.	com)	C 🗏 🗹 🗙
New Service contact contact Te	sting (TestingContact1@tylertech.com)	C 🗏 🗹 🗙
s p (steven.pham@tylertech.co	m)	C 🗏 🗹 🗙
tamasha Anderson (Anderson@	testingtw.com)	
Tamasha motor (tamashatest@		
Tim Thompson (werwer@test.co	om)	
dd New Add From Master List	Add From Public List Show History	
First Name*	Middle	Last Name*
Jameson	Aurther	Westinghouse
taw@rawitserlaw.com	kathy@rawitserlaw.com	Firm Name Rawitser Law Firm
Address	Racing en annochamiconn	City
7977 E. Frankford Way		Mountain City
State	Zip Code	
ototo	 112123 	
Alaska		
Alaska Phone 🕢		
Alaska Phone () (xxx)xxx-xxxx		

Figure 13.10 – Manage Case Service Contacts Window

- 4. Select a service contact from the list.
- 5. Click the **Show History** button to view the history of the contact selected.

Sel	PF Service Contact History		
A	Pr Name	Action	Time
BOOKMA	New Service contact contact Testi	Attach	8/10/2012 3:09 PM
35 7 6	Adam Record	Attach	8/10/2012 3:13 PM
	Tamasha motor	Attach	8/10/2012 3:13 PM
elope # 0	tamasha Anderson	Attach	8/10/2012 3:13 PM
163545 starter	sp	Attach	8/13/2012 10:26 AM
	Adam Smith	Attach	8/13/2012 10:26 AM
Add New	Tim Thompson	Attach	8/13/2012 10:26 AM
	Jameson Aurther Westinghouse	Attach	8/15/2012 5:17 PM
First N	an		
163544 starter Email*	on		
jaw@r	aw		
Address	3		Clos
7977 8		o 1	
State	Ζιρ	Code	

Figure 13.11 – View Service Contact History

6. Click the **Close** to close the window and return to the service contacts page.

Viewing the Service Contact Details

You can view the service contacts details of a contact in the Service Contacts list.

Perform the following steps to view the service contacts details of a contact in the **Service Contacts** list:

1. Click the SERVICE CONTACTS link at the top of the window.

This action opens the Service Contacts page.

	SERVICE CON IAC			
lame		Email		
ark Schwartz		mark.schwartz@tylertech.com		-
ark Twedt		mark.twedt@tylertech.com		
aite Cervera		maite.cervera@tylertech.com		
ark DD Twedt		marktwedt@msn.com	E E O X	
avid Lomas		david.lomas@tylertech.com		
ave Lomas		david_lomas1@hotmail.com		
ike Smith		mark_schwartz@hotmail.com		-
First Name*	Middle	Last Name*		
	15 d.l	1 t N t		
First Name*	Middle	Last Name*		
First Name* Email*	Middle Firm Name Tyler	Last Name*		
First Name* Email* Address	Middle Firm Name Tyler	Last Name*		
First Name* Email* Address	Middle Firm Name Tyler	City		
First Name* Email* Address State	Middle Firm Name Tyler Zip Code	City		
First Name* Email* Address State Phone	Middle Firm Name Tyler Zip Code	City		
First Name* Email* Address State Phone	Middle Firm Name Tyler Zip Code	City		
Fi rst Name* Email* Address State Phone	Middle Firm Name Tyler Zip Code	City		
First Name* Email* Address State Phone	Middle Firm Name Tyler Zip Code	Last Name*	Contact	

Figure 13.12 – Service Contacts Screen

- 2. Locate the service contact you want to view the details for.
- 3. Click the disconfor that service contact.
- 4. This opens the Service Contact Details screen displaying the service contact information.

Name Jameson Aurther Westinghouse Rawkiser Law Film Denim Jeans Tamasha motor Adam Record Adam Smith August 14th sue Tim Thompson Jameson Aurther Westinghouse Add New First Name* Middle Last Name* Jameson Aurther Westinghouse Email* Administrative Copy @) Firm Name Email* Administrative copy Firm Name	GS BOOKMARKS T	EMPLATES REV Service Contact Detail	s: Jameson Aurther Westinghouse	23		
Tamasha motor Tamasha motor Adam Record Jaw@rawltserlaw.com Adam Smith Agust 14th sue Tim Thompson Jameson Aurther Westinghouse Add New Close	me	Jameson Aurther Westing	ghouse			7
Tamasha motor Adam Record Adam Smith August 14th sue Tim Thompson Jameson Aurther Westinghouse First Name* Jameson Aurther Aurther Middle Last Name* Jameson Aurther First Name Jameson Aurther Pirm Name First Name First Name	m Jeans	7977 E. Frankford Way, M	Mountain City, AK 22323	_	CEOX A	
Adam Record Adam Smith August 14th sue Tim Thompson Jameson Aurther Westinghouse First Name* Middle Last Name* Jameson Aurther Westinghouse First Name Aurther Westinghouse First Name Middle Copy @ Firm Name Jameson Aurther Middle Copy @ Firm Name	asha motor	Jaw@rawitseriaw.com			C E O X	
Adam Smith August 14th sue Tim Thompson Jameson Aurther Westinghouse Add New First Name* Middle Last Name* Jameson Aurther Westinghouse First Name Middle First Last Name*	n Record				C E O X	
August 14th sue Im Thompson Immeson Aurther Westinghouse First Name* Middle Last Name* Jameson Aurther Bameson Aurther Hiddle Last Name* Jameson Aurther First Name Pirst	n Smith				C E O X	
Im Thompson Iameson Aurther Westinghouse	ıst 14th sue				C E O X	
ameson Aurther Westinghouse	Thompson				C E O X	
Add New First Name* Middle Last Name* Jameson Aurther Westinghouse Email* Administrative Copy ③ Firm Name	eson Aurther Westinghouse				CEOX -	
First Name* Middle Last Name* Jameson Aurther Westinghouse Email* Administrative Copy @ Firm Name Daw@realtherdaw.com Previdence Firm				Close		
First Name* Middle Last Name* Jameson Aurther Westinghouse Email* Administrative Copy (i) Firm Name Jaw@rawlisedaw.com Pawliser Law Firm	New				_	
Jameson Aurther Westinghouse Email* Administrative Copy (i) Firm Name Jaw@irawitserlaw.com Pawitser Law Firm	st Name*	Middle	Last Name*			
Email* Administrative Copy () Firm Name	meson	Aurther	Westinghouse			
jaw@rawitserlaw.com Rawitserlaw.com	nail*	Administrative Copy 🥡	Firm Name			
June and Schamoon Radified and Schamoon Radified Law Hinn	w@rawitserlaw.com	kathy@rawitserlaw.com	Rawitser Law Firm			
Address City	dress		City			

Figure 13.13 – Service Contact Details Window

5. Click the **Close** button to return to the **Service Contacts** list.

Viewing the Attached Cases List

You can view the Attached Case list for the service contacts on the Service Contacts list.

Perform the following steps to view the **Attached Case** list for the service contacts on the **Service Contact** list:

1. Click the SERVICE CONTACTS link at the top of the window. This opens the Service Contacts page.

enim Jeans JDenim@tylertech.com Image: State St	lame	Email	
amasha motor tamashatest@gmail.com Imashatest@gmail.com Imasha	enim Jeans	JDenim@tylertech.com	
dam Record aefsets6@gmail.com Image: State Stat	amasha motor	tamashatest@gmail.com	
Adam Smith aefsets2@gmail.com Image: 1 and 1 and 2 an	Adam Record	aefstest6@gmail.com	
August 14th sue 81412@august.com Image: Comparison of the c	Adam Smith	aefstest2@gmail.com	
Tim Thompson werwer@test.com Image: Comparison of the strength of t	August 14th sue	81412@august.com	
Jameson Aurther Westinghouse jaw@rawitserlaw.com Add New	Tim Thompson	werwer@test.com	E = 🤉 🗙
Add New	ameson Aurther Westinghouse	jaw@rawitserlaw.com	
	Add New		

Figure 13.14 – Add New Firm Service Contact Form

- 2. Click the 🔲 icon for that service contact.
- 3. The Attached Cases screen appears.
- 4. Click the **Close** button to return to the **Service Contacts** list.

Replacing Service Contacts on the Case

You can replace service contacts on case and in the Service Contacts list.

Perform the following steps to replace a service contacts on the Service Contacts list:

1. Click the SERVICE CONTACTS link at the top of the window. This opens the Service Contacts page.

FILINGS BOOKMARKS TEMPLATES REVIEW QUEUE REVI	EW HISTORY SERVICE CONTACTS	
Name	Email	^
Denim Jeans	JDenim@tylertech.com	
Tamasha motor	tamashatest@gmail.com	
Adam Record	aefstest6@gmail.com	
Adam Smith	aefstest2@gmail.com	
August 14th sue	81412@august.com	
Tim Thompson	werwer@test.com	
Jameson Aurther Westinghouse	jaw@rawitserlaw.com	
Add New		
		_
		Ť

Figure 13.15 – Replacing Service Contacts Form

- 2. Click the 2 icon for that service contact.
- 3. The Replace Service Contact form screen appears.

1 Note: File & Serve sends a notification to service contacts being removed from a case.

- 4. Click the **Save Contact** button to save the contact to the **Service Contacts** list.
- 5. The new contact information is displayed in the **Service Contact** list.

Deactivating a Service Contact on the Case

You can deactivate a service contacts on the case in the Service Contacts list.

Perform the following steps to deactivate a service contacts on the Service Contacts list:

1. Click the SERVICE CONTACTS link at the top of the window. This opens the Service Contacts page.

Name Email Denim Jeans JDenim@tylertech.com Imails Tamasha motor tamashatest@gmail.com Imails Adam Record aefstest@gmail.com Imails Adam Smith aefstest@gmail.com Imails August 14th sue 81412@august.com Imails Tim Thompson Imails Imails Jameson Aurther Westinghouse jaw@rawitserlaw.com Imails	ILINGS BOOKMARKS TEMPLATES REVIEW QUEUE RE	VIEW HISTORY SERVICE CONTACTS	
Denim Jeans JDenim@tylerteh.com Image: Sector	Name	Email	
Tanasha motor tanashates@gmail.com Imashates@gmail.com	Denim Jeans	JDenim@tylertech.com	C 🗏 🔿 🗙 🔺
Adam Record aefstes6@gmall.com Image: State Sta	Tamasha motor	tamashatest@gmail.com	
Adam Smith aefstest2@gmail.com Image: Com August 14th sue S1412@august.com Image: Com Tim Thompson werwer@test.com Image: Com Jameson Aurther Westinghouse jaw@rawitserlaw.com Image: Com	Adam Record	aefstest6@gmail.com	
August 14th sue 81412@august.com Image: State S	Adam Smith	aefstest2@gmail.com	
Tim Thompson werwer@test.com Image: Comparison of the state of the	August 14th sue	81412@august.com	
Jameson Aurther Westinghouse jaw@rawitserlaw.com	Tim Thompson	werwer@test.com	
Add New	Jameson Aurther Westinghouse	jaw@rawitserlaw.com	
	Add New		

Figure 13.16 – Deactivating Service Contacts Form

2. Click the icon for that service contact. This removes a service contact from the **Service Contacts** list.

1 Note: File & Serve sends a notification to service contacts being removed from the case. This also removes the administrator's e-mail attached to the contact.