Odyssey® File & Serve

User Guide – Release 3.4

Copyright and Confidentiality

Contents

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1 Odyssey® File & Serve Overview

Topics Covered in this Chapter

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 can only cancel draft and submitted 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 Icons

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.
	Manage your service contacts.
	View the service contact, filing, or template details.
	File into the case.
	Bookmark the case.
	Resume the draft envelope.
	Cancel the filing.
	Copy the envelope or filing.
	Add template to My Favorites folder.
	Edit a template.
	View attached case list.
	Replace service contacts.

Page Navigation

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

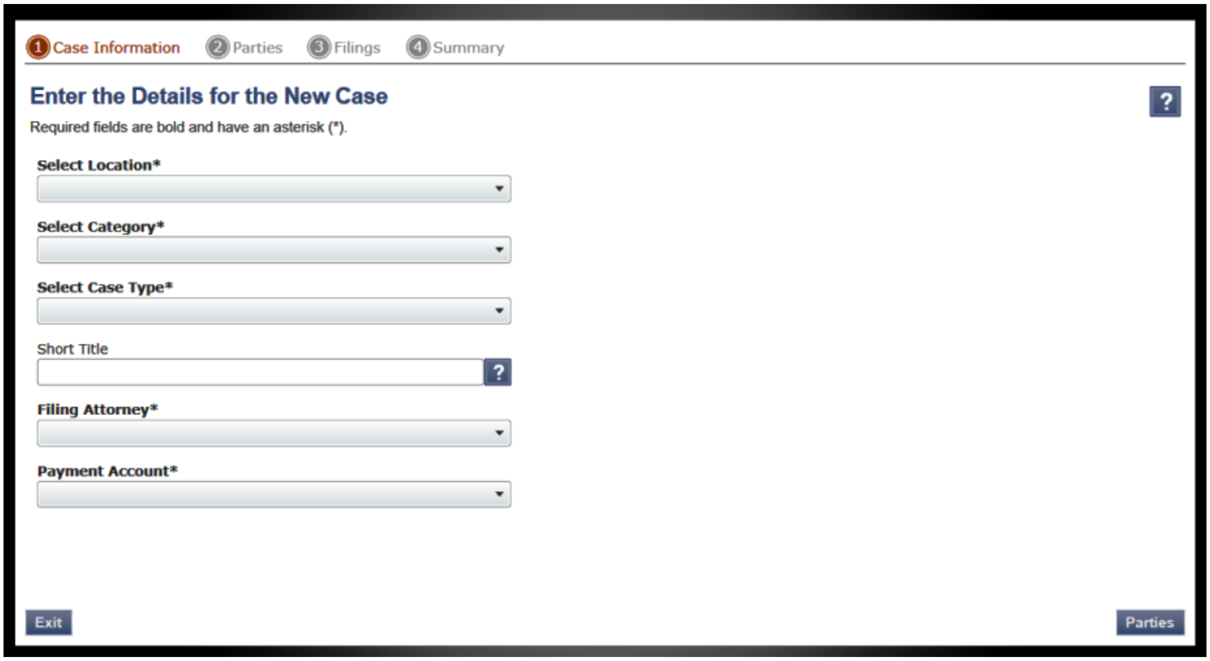


Figure 2.1 – Case Information Page

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.

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.

Figure 2.2 – Breadcrumb Navigation

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	
Defendant	Bob Jones	
Trustee	April Smith	
Petitioner	jackson Williams	

Figure 2.3 – Data Table

Enter User Information

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

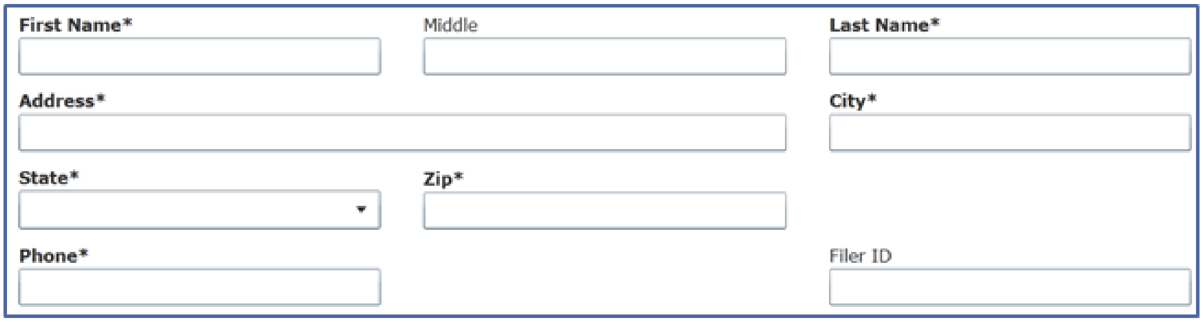


Figure 2.4 – Data Fields

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 icon to resume your filing.

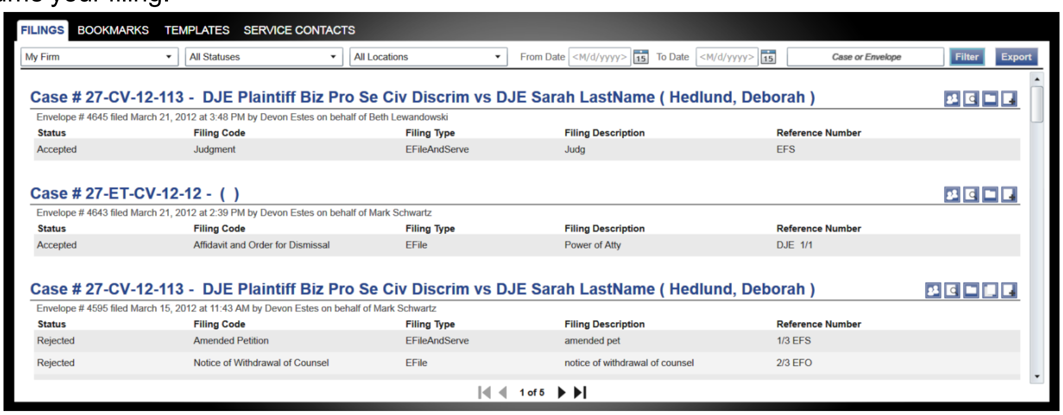


Figure 2.5 – File & Serve Workspace

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.

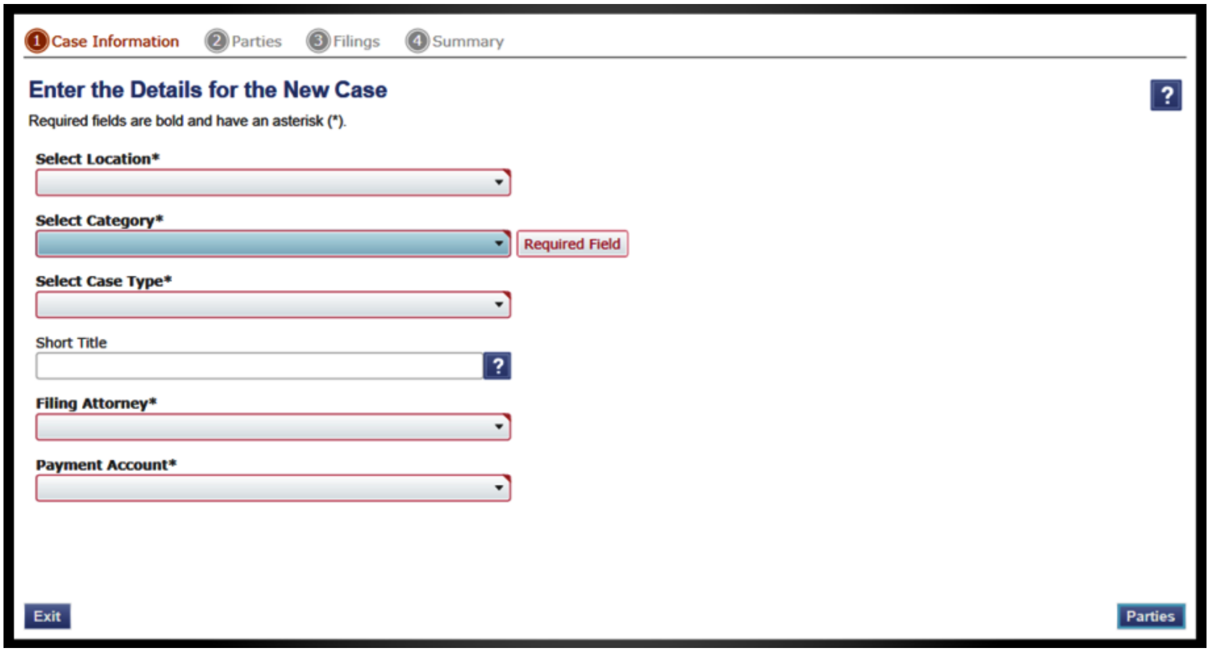


Figure 2.6 – Required Field Error Message

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.

Figure 2.7 – Invalid Entry Error Message

3 File & Serve Registration

Topics Covered in this Chapter

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.

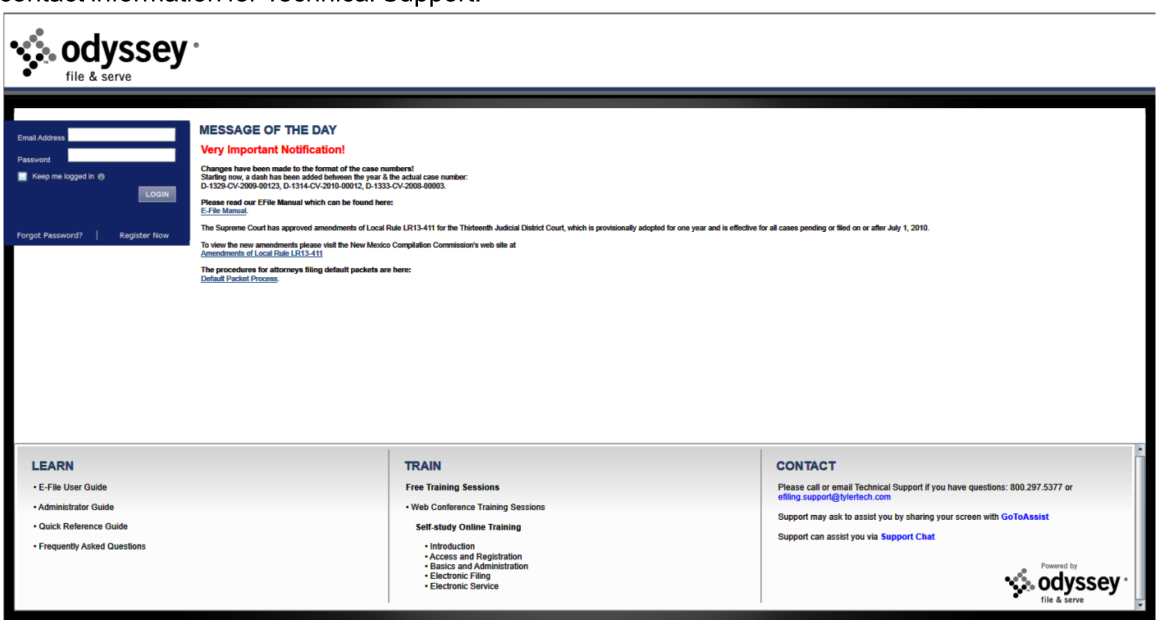


Figure 3.1 – File & Serve Home Page

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.

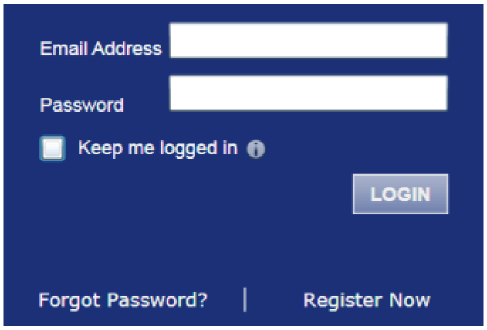


Figure 3.2 – Login Window

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.

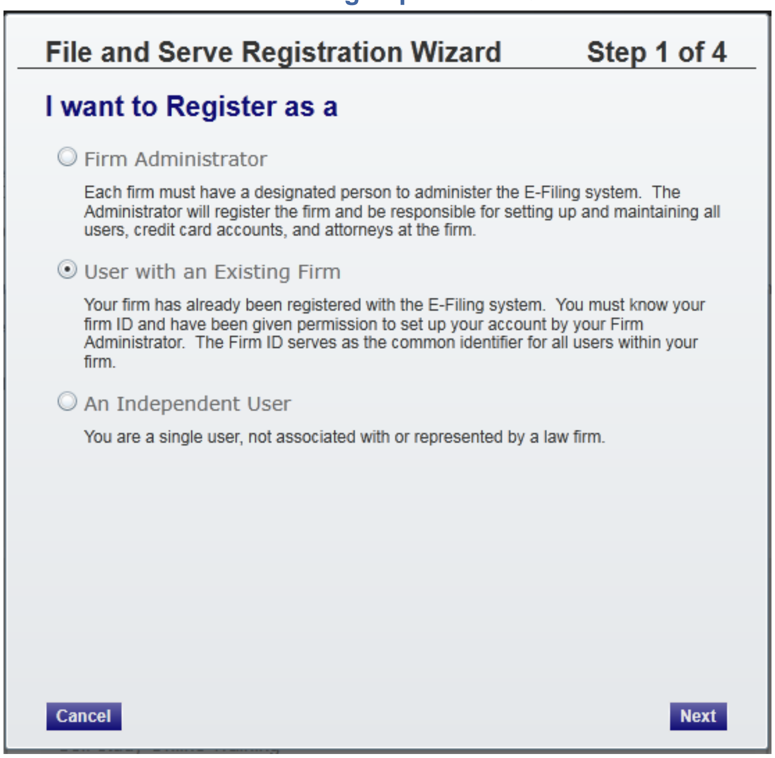


Figure 3.3 – File and Serve Registration Wizard (Step 1 of 4)

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.

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.

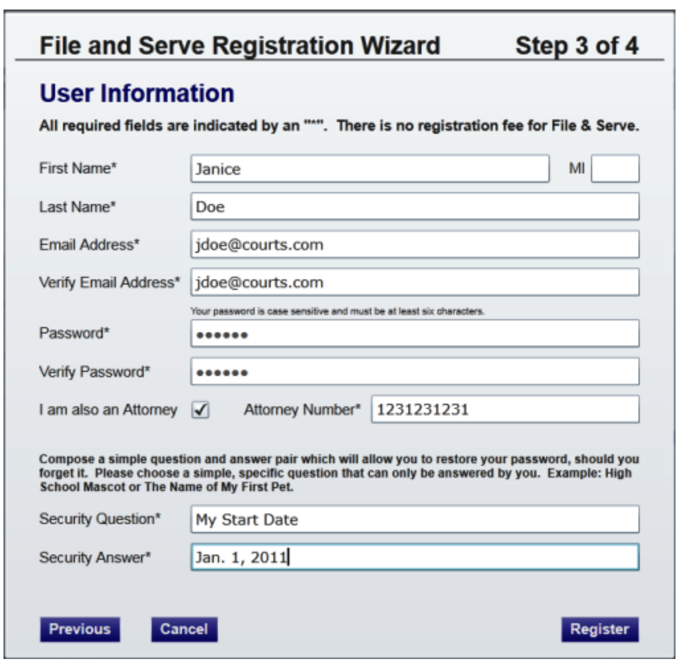


Figure 3.5 – File and Serve Registration Wizard (Step 3 of 4)

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?`)

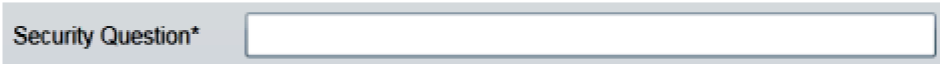


Figure 3.6 – Security Question Field

9. Enter a **Security Answer** in the field provided.

Figure 3.7 – Security 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.

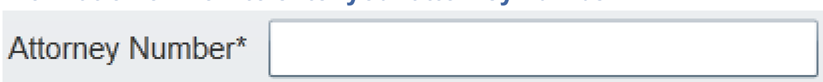


Figure 3.8 – Attorney Number Field

Note: Click the Verify 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.

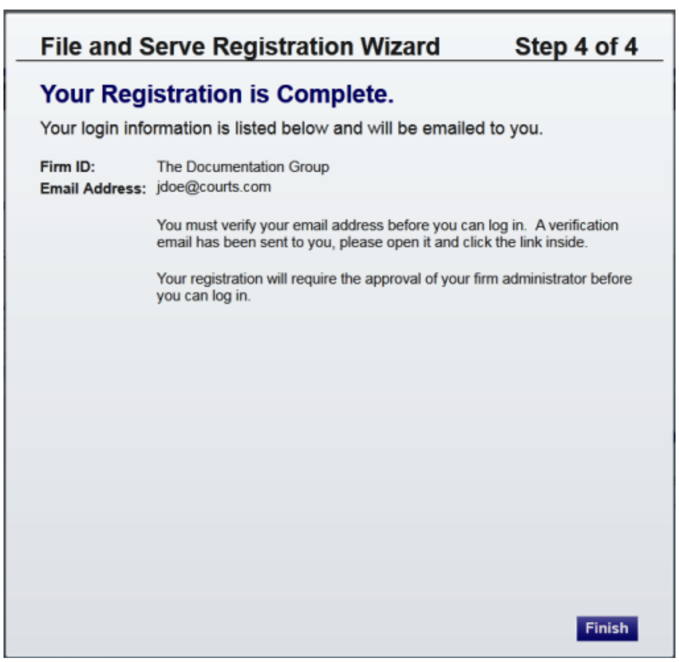


Figure 3.9 – File and Serve Registration Wizard (Step 4 of 4)

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.

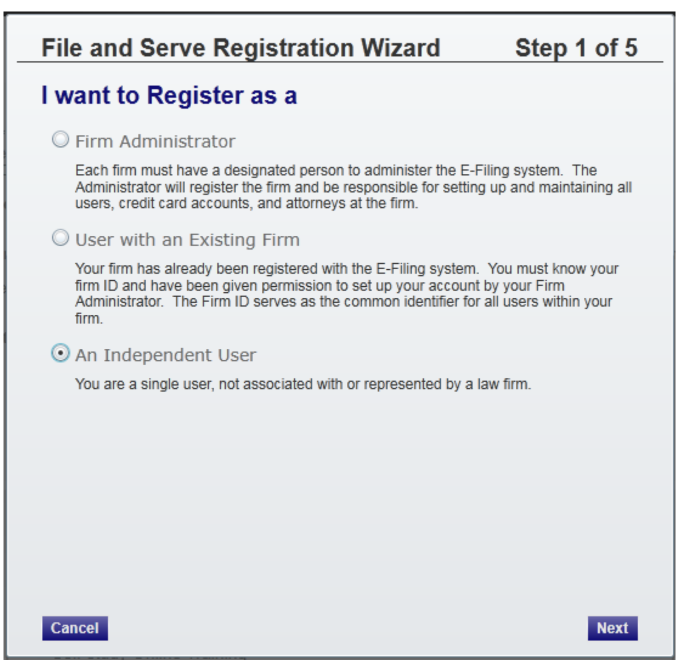


Figure 3.10 – File and Serve Registration Wizard (Step 1 of 5)

4. Read the **Odyssey File and Serve Usage Agreement**.

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.

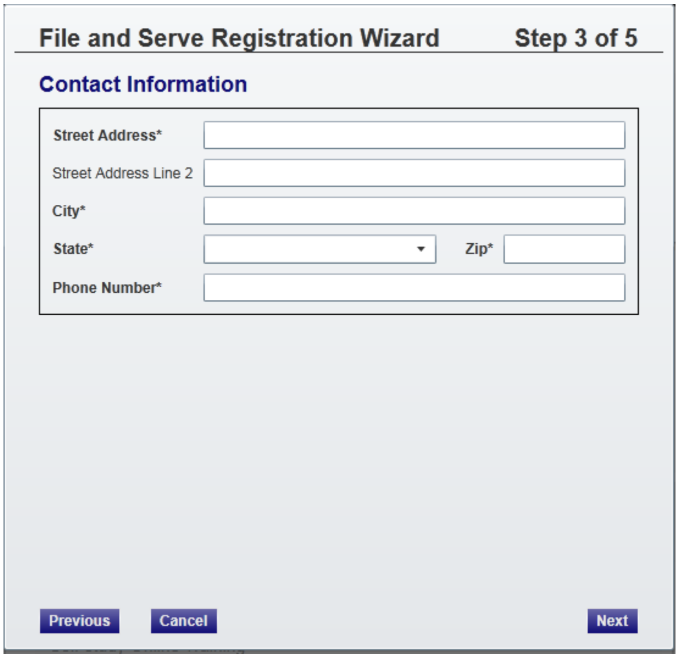


Figure 3.12 – File and Serve Registration Wizard (Step 3 of 5)

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.

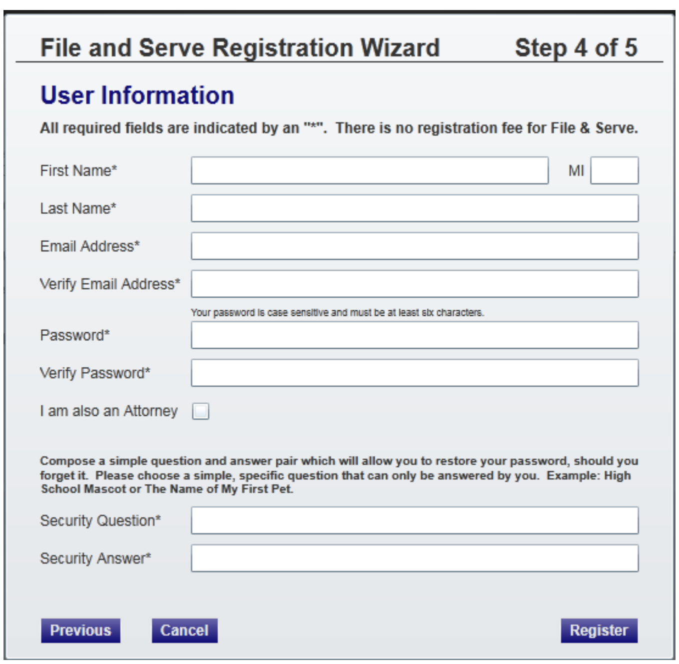


Figure 3.13 – File and Serve Registration Wizard (Step 4 of 5)

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.

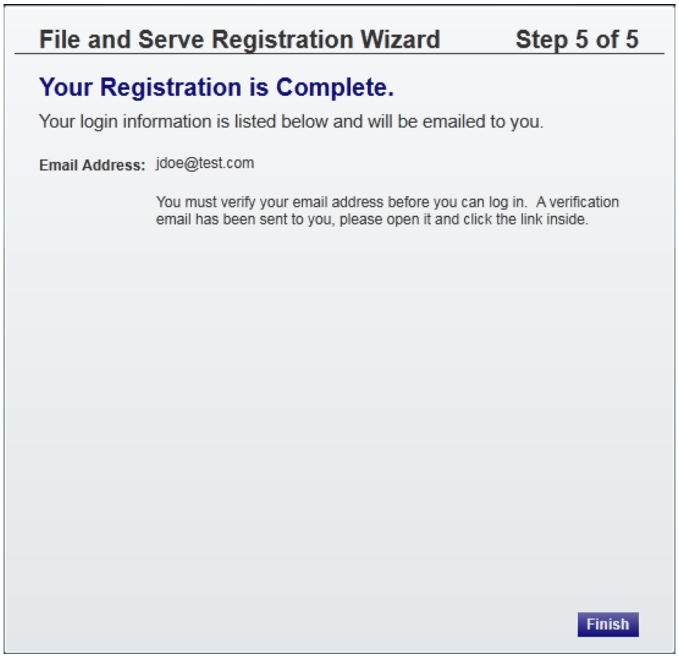


Figure 3.14 – File and Serve Registration Wizard (Step 5 of 5)

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.

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.

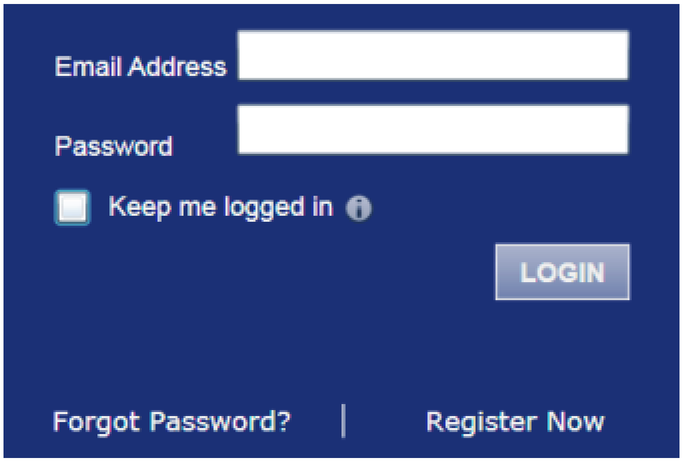


Figure 3.15 – Login Window

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

   The **Reset Password** window opens.

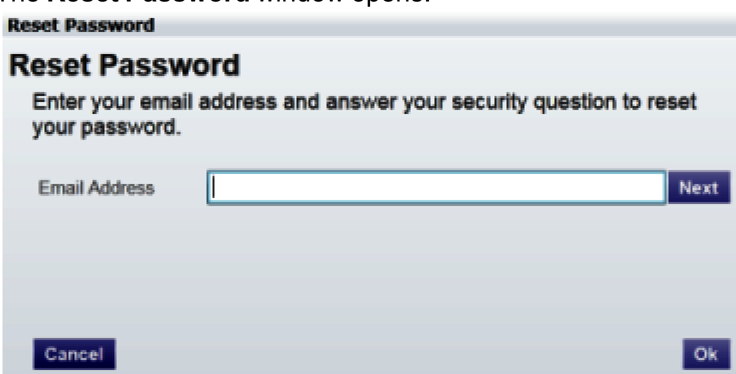


Figure 3.16 – Reset Password – E-mail Address

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.

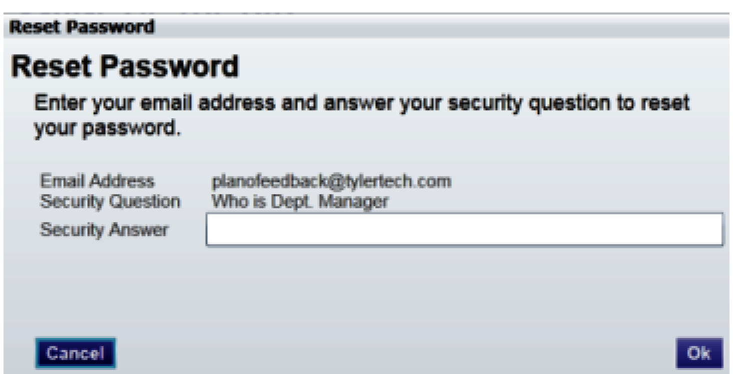


Figure 3.17 – Reset Password – Security Answer

4. Type your answer in the **Security Answer** field.

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.

Figure 3.18 – Reset Password – Confirmation

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

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.

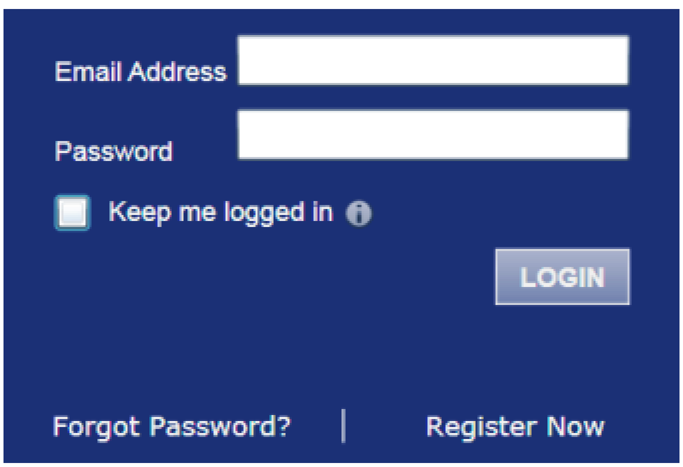


Figure 4.1 – File & Serve Login Area

3. Select the Keep me logged in 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.

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.

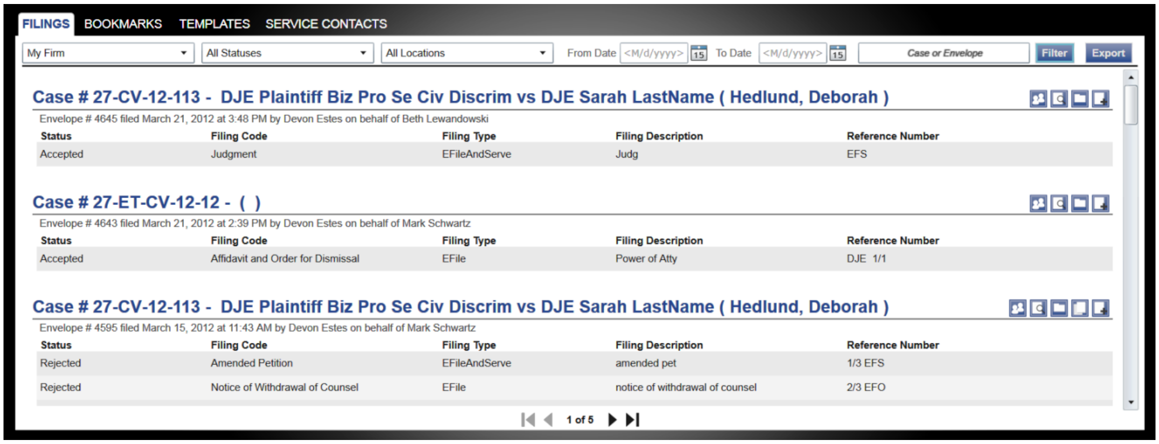


Figure 5.1 – File & Serve Workspace

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.

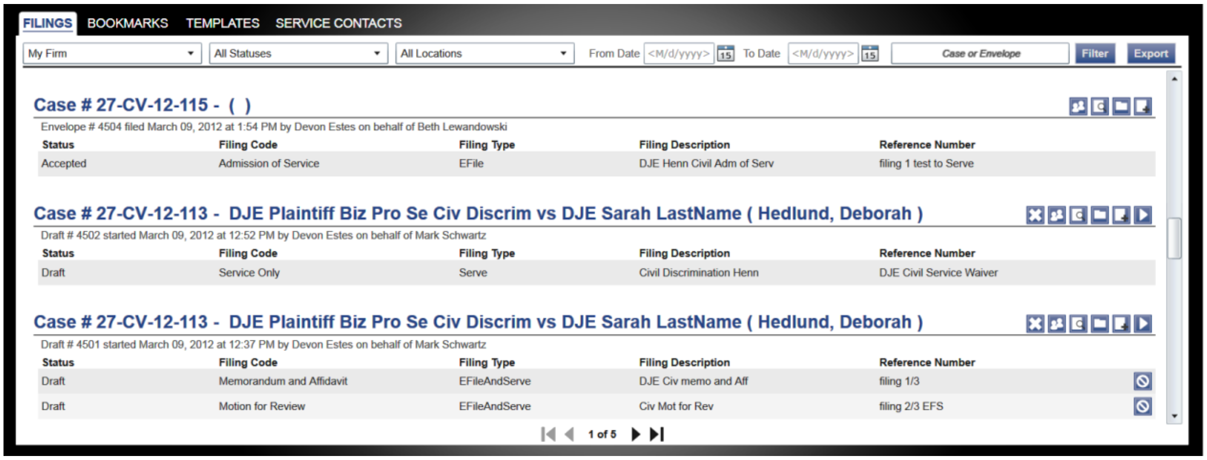


Figure 6.1 – Templates Screen

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 Filter button.

- Click the icon to add the template to your favorites.
- Click the icon to view the template 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

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

Figure 7.1 – New Case Link

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.

Figure 7.2 – New Case Link

The **Case Information** page opens.

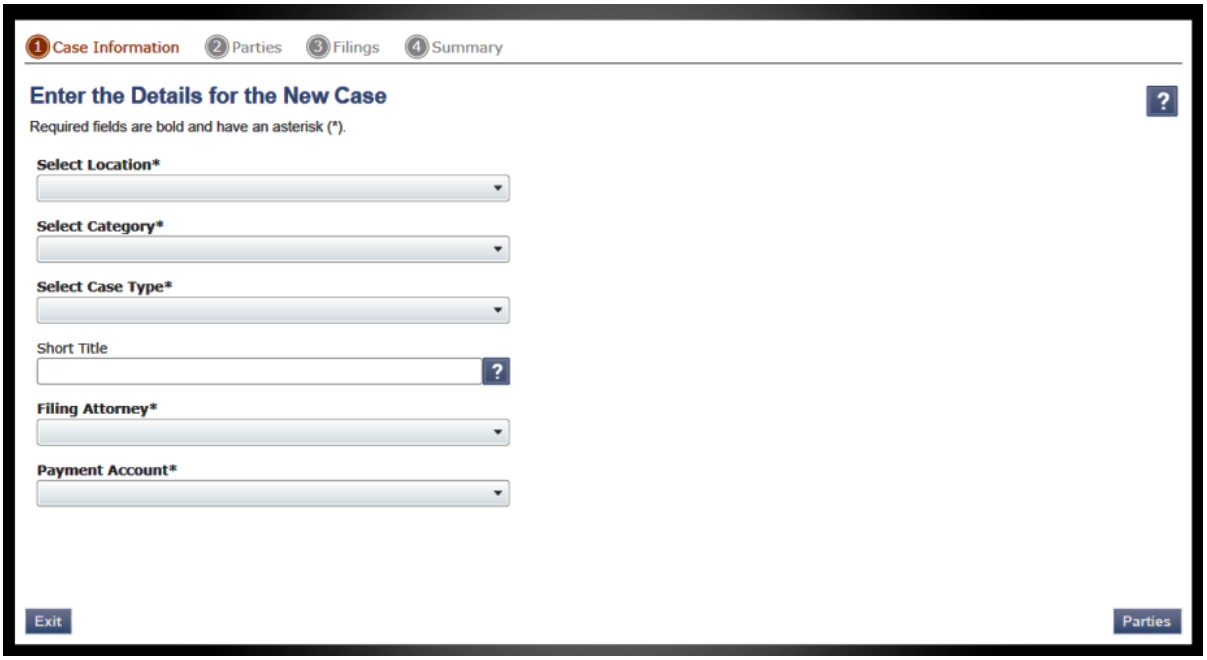


Figure 7.3 – Case Information Page

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

   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 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.

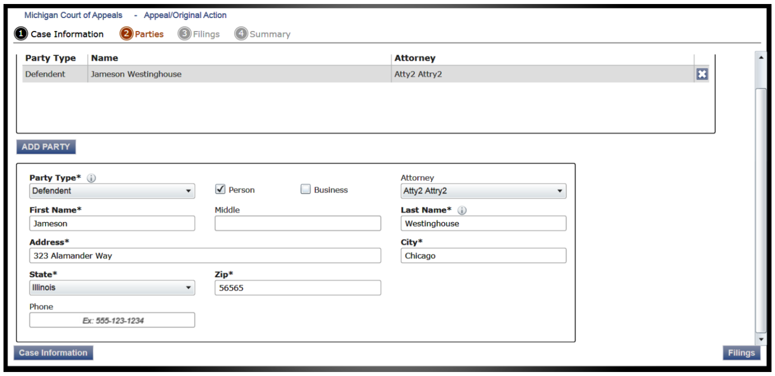


Figure 7.4 – Parties Page

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.

   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.

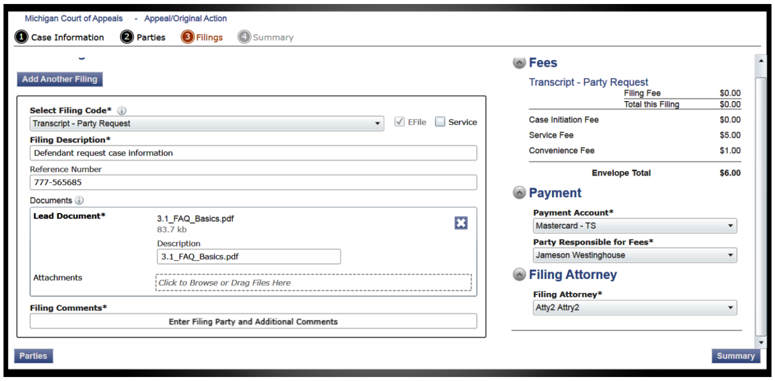


Figure 7.5 – Entering Filing Details Screen

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.

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

   c. Click Open 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.

      Note: Multiple documents can be uploaded as attachments simultaneously.

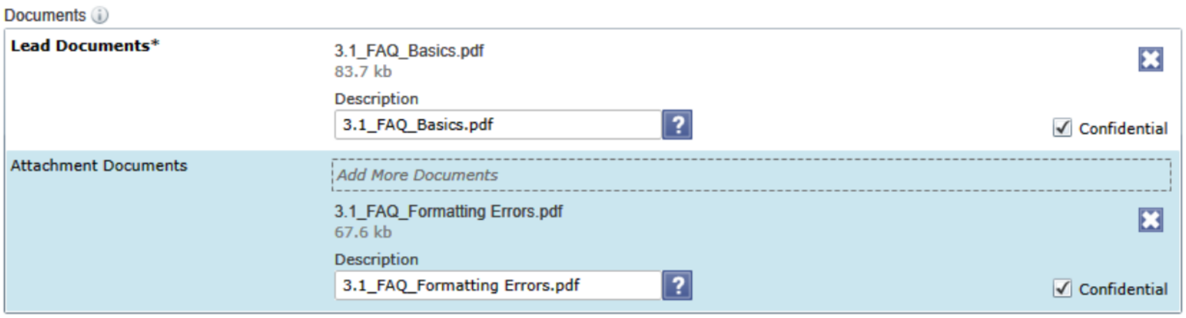


Figure 7.6 – Uploading an Attachment

c. Click Open 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 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 Parties button to return to the previous screen.

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.

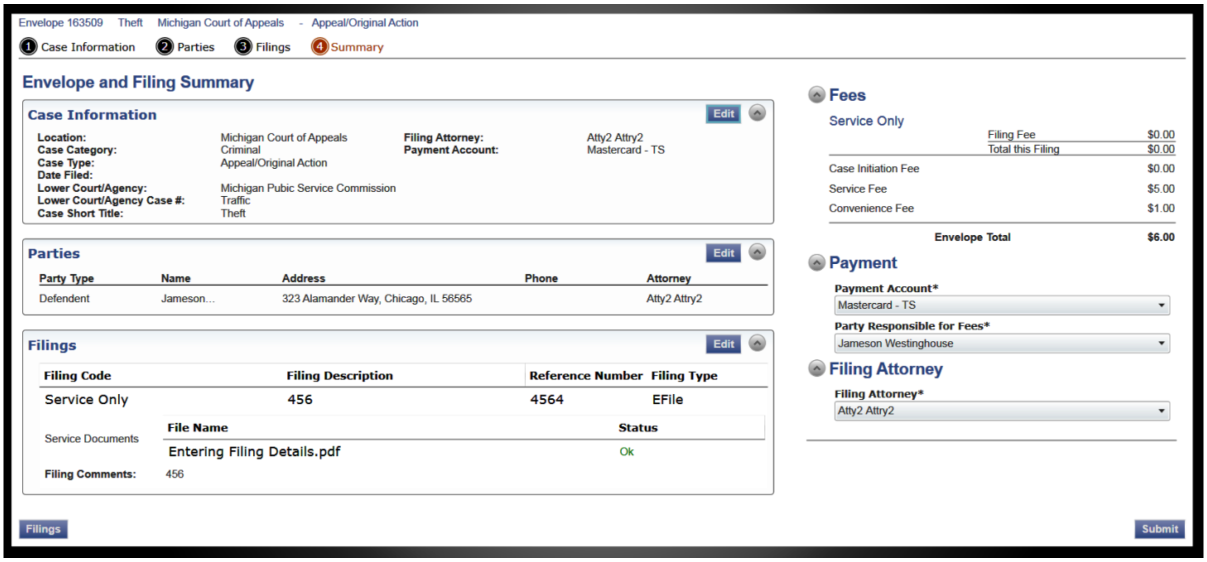


Figure 7.7 – Envelope and Filing Summary Page

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.

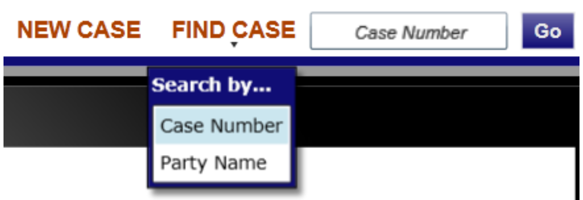


Figure 8.1 – Search by Case Number Option

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.

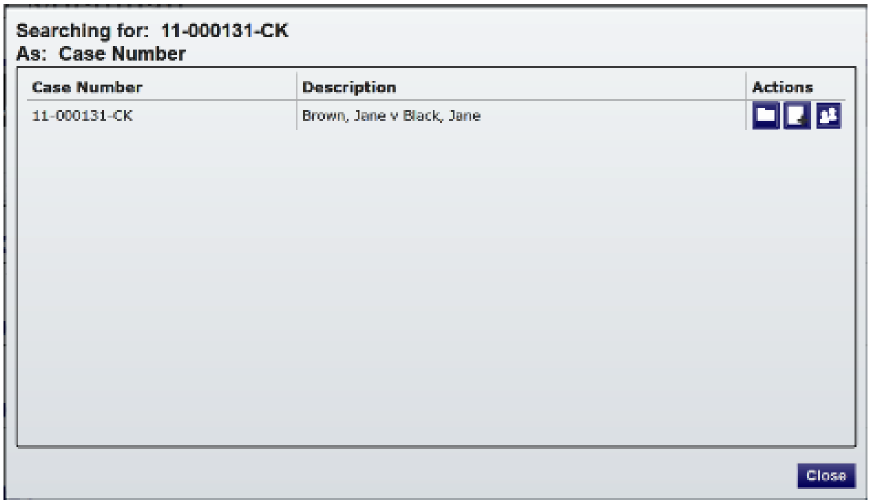


Figure 8.2 – Case Search Results

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.

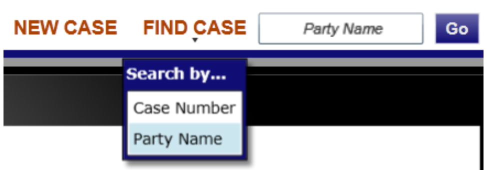


Figure 8.3 – Searching by Party Name Option

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.

   Note: This will take you to the Filings screen.

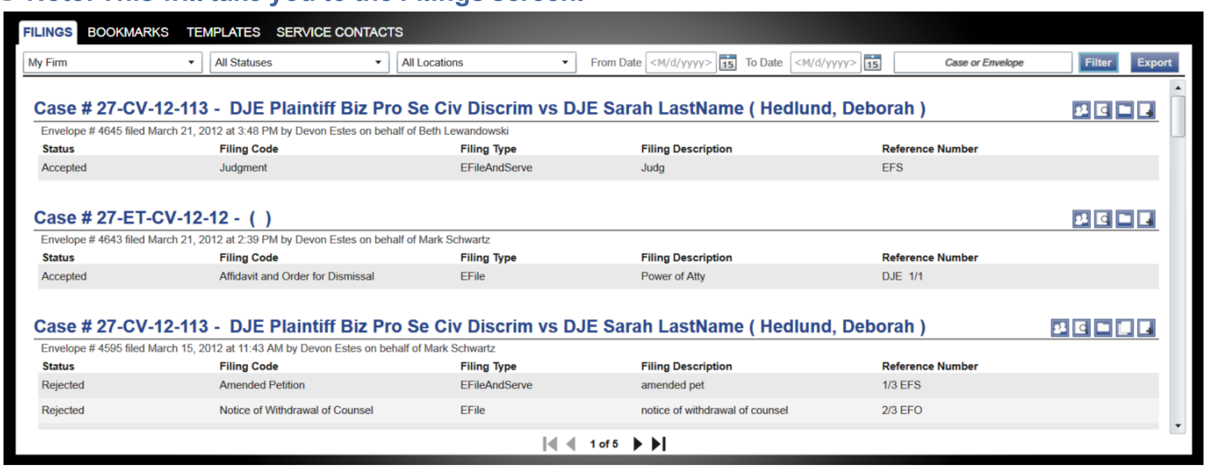


Figure 9.1 – Filing Screen

   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.

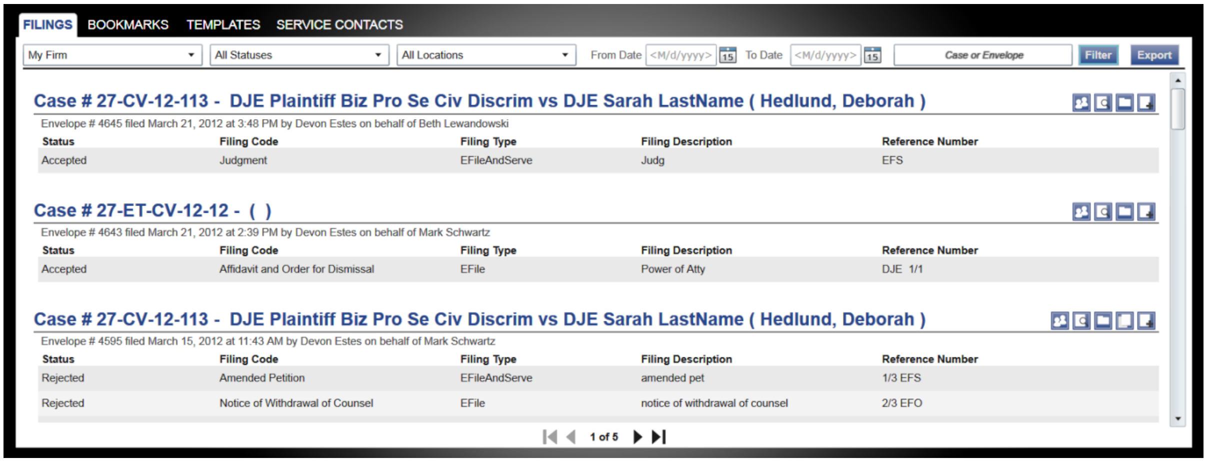


Figure 9.2 – Filing Screen

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.

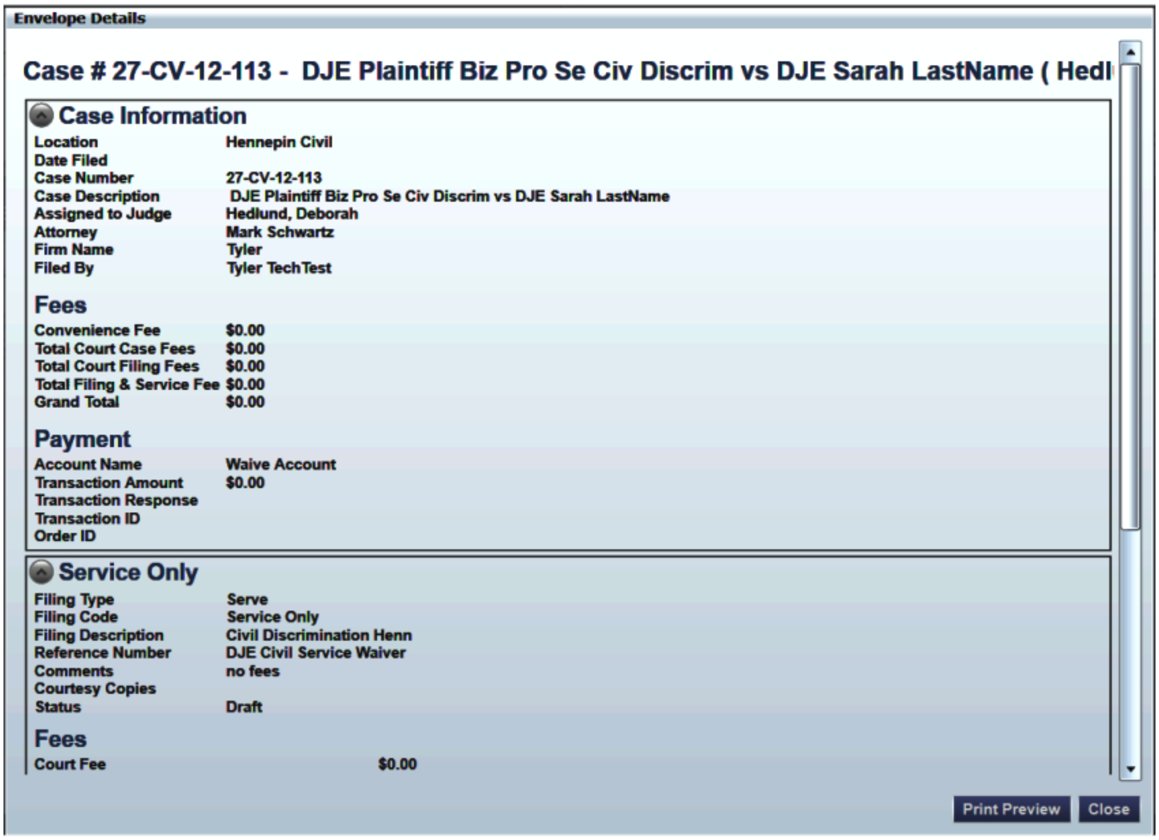


Figure 9.3 – Envelope Details Screen

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.

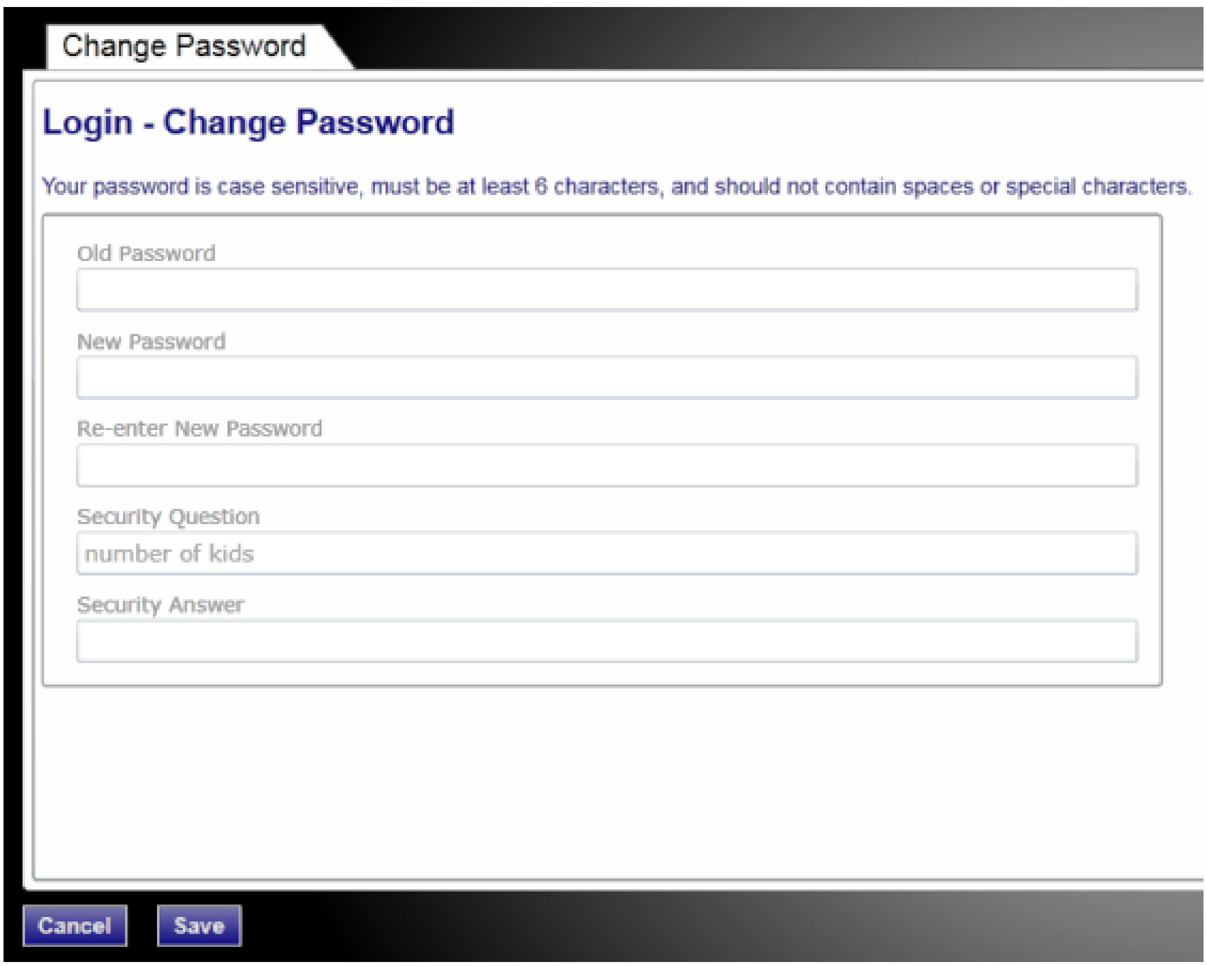


Figure 10.1 – Login – Change Password Screen

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.

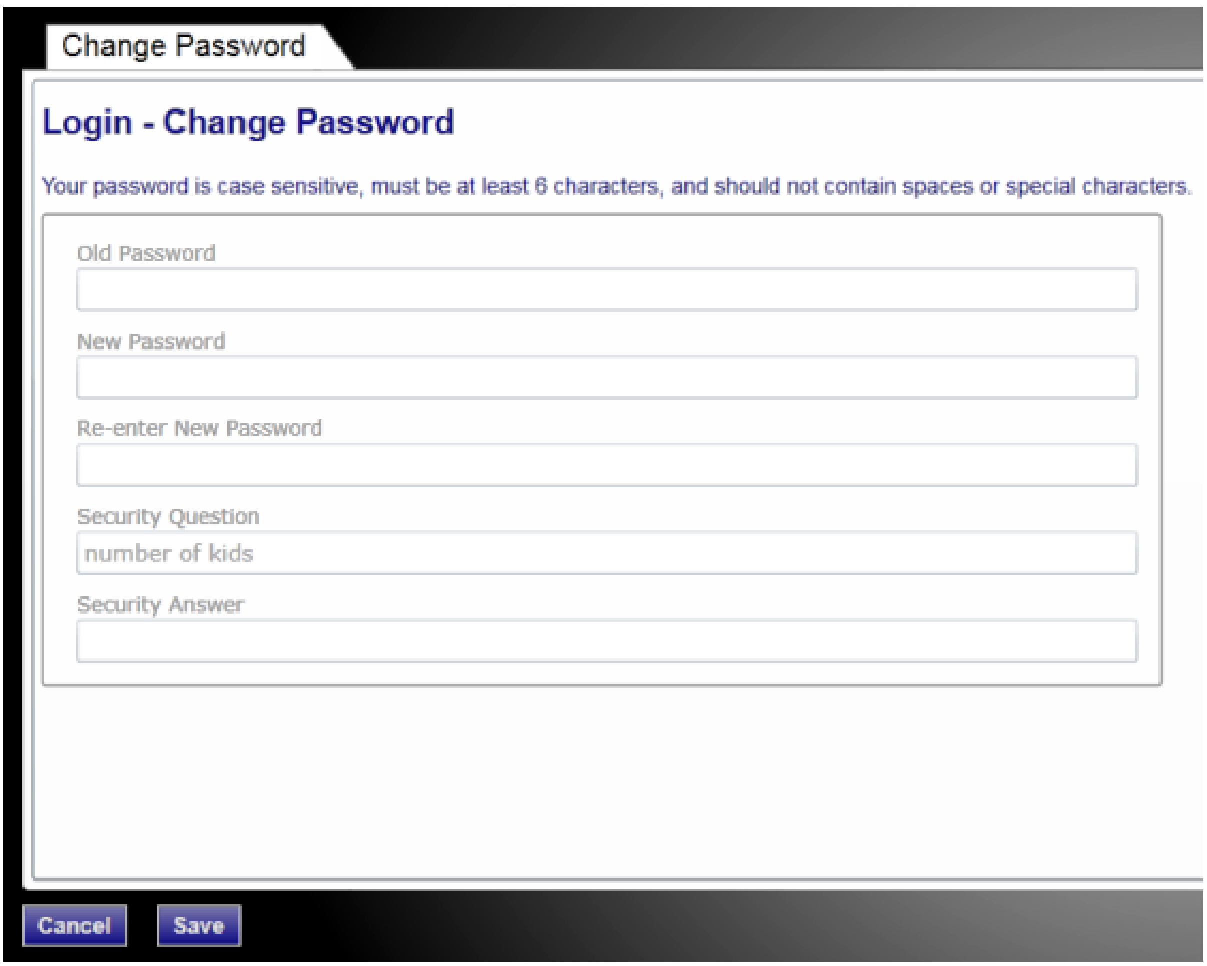


Figure 10.2 – Change the Security Question

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 

button to refresh the **Bookmarks** page.

Filing into an Existing Case

Click the  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

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.

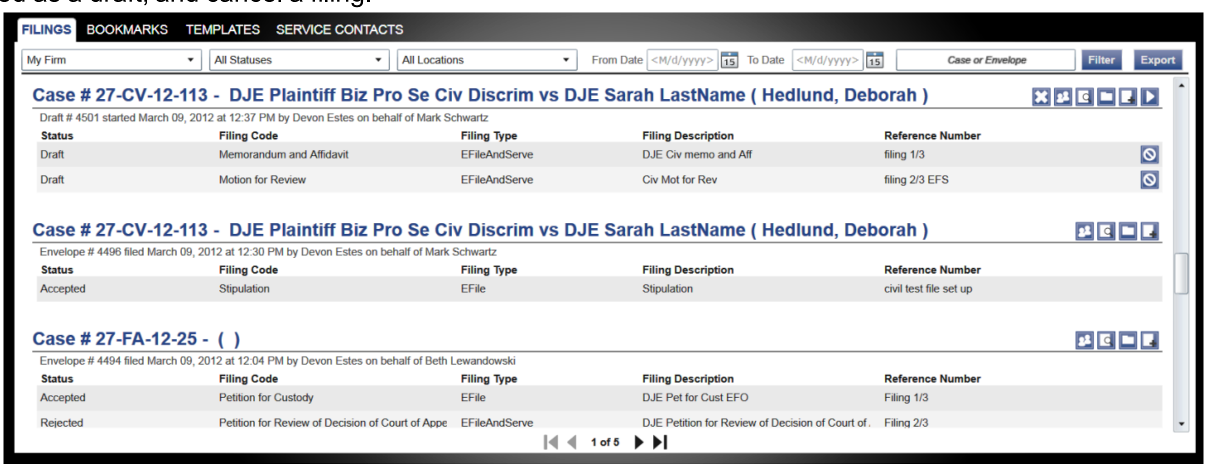


Figure 12.1 – Filings Screen

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.

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`).

Figure 12.2 – Select the Dates Using the Calendar

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

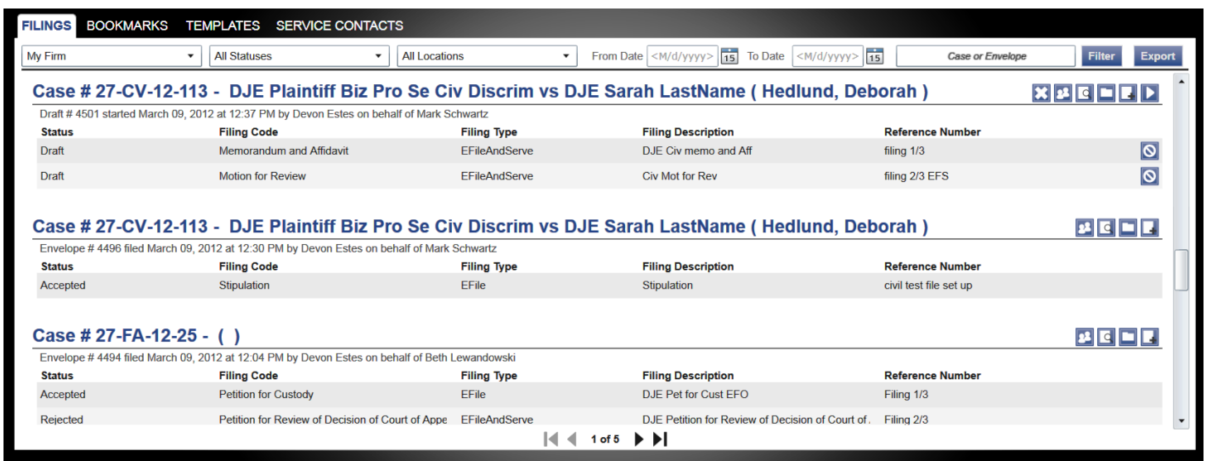


Figure 12.3 – Filings Screen

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.

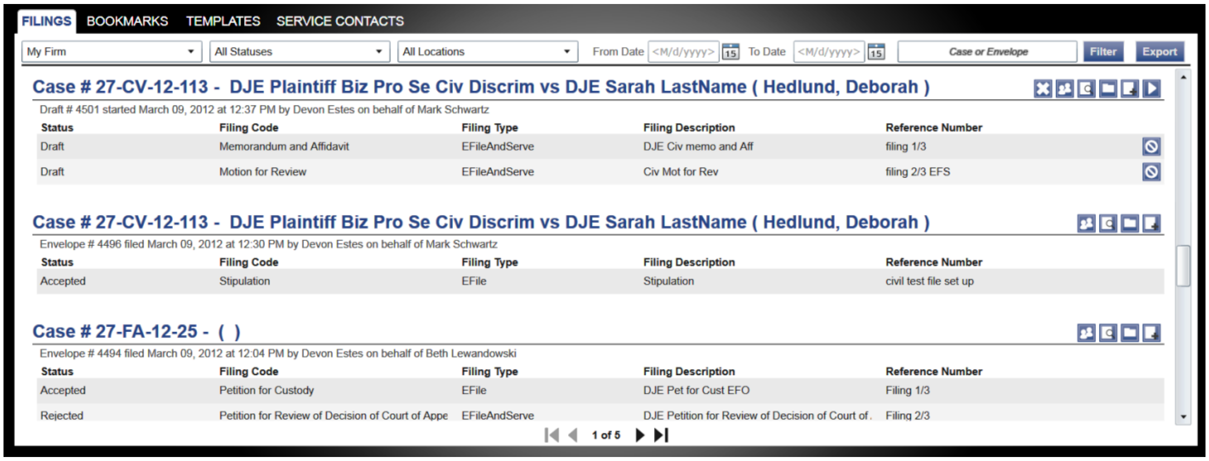


Figure 12.4 – Filings Screen

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 

button.

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

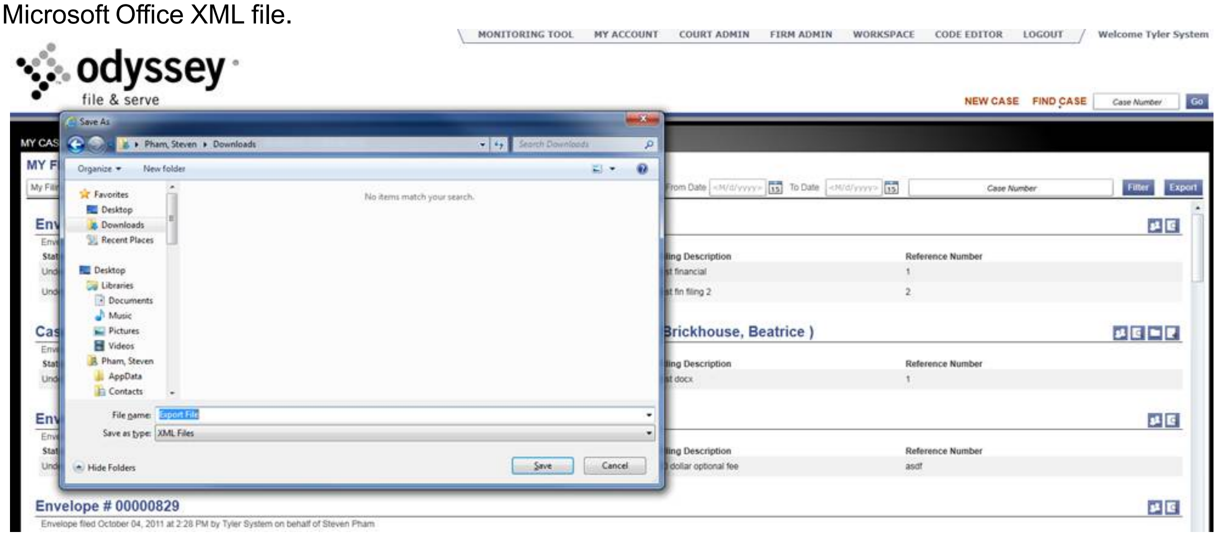
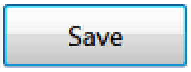


Figure 12.5 – Windows Explorer

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

Figure 12.6 – File Name Field

4. Click the  button to save the filings to your computer, or click the  button to cancel.

File & Serve saves the files to your computer.

Viewing the Export File

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  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.

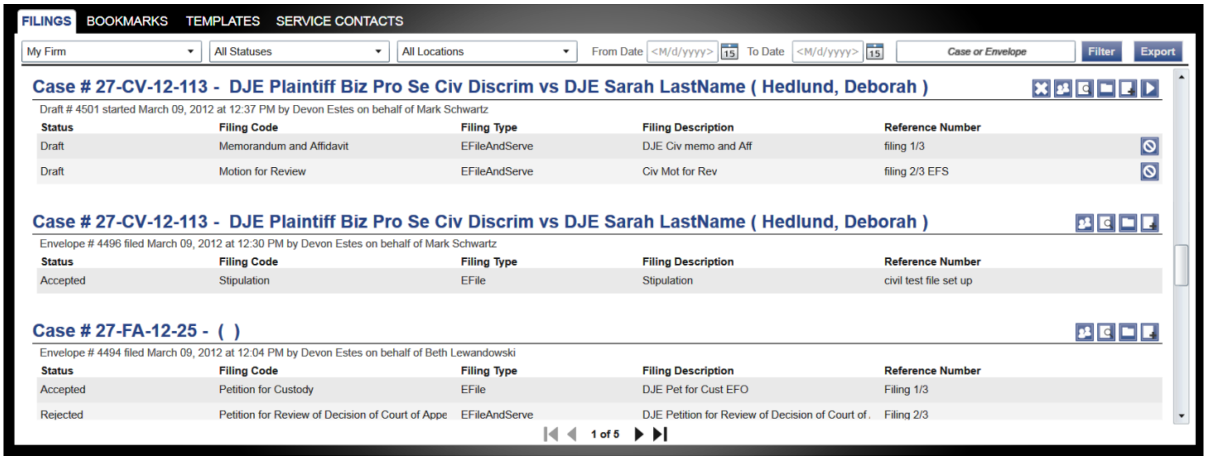


Figure 12.7 – Filings Screen

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.

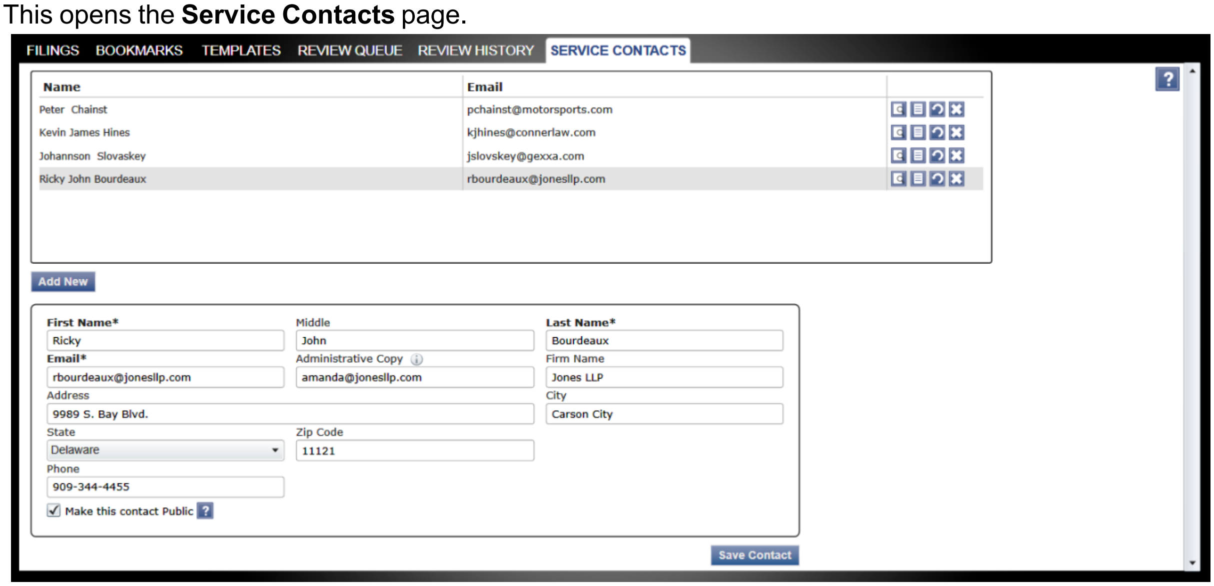


Figure 12.8 – Adding Service Contacts Form

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.

   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.

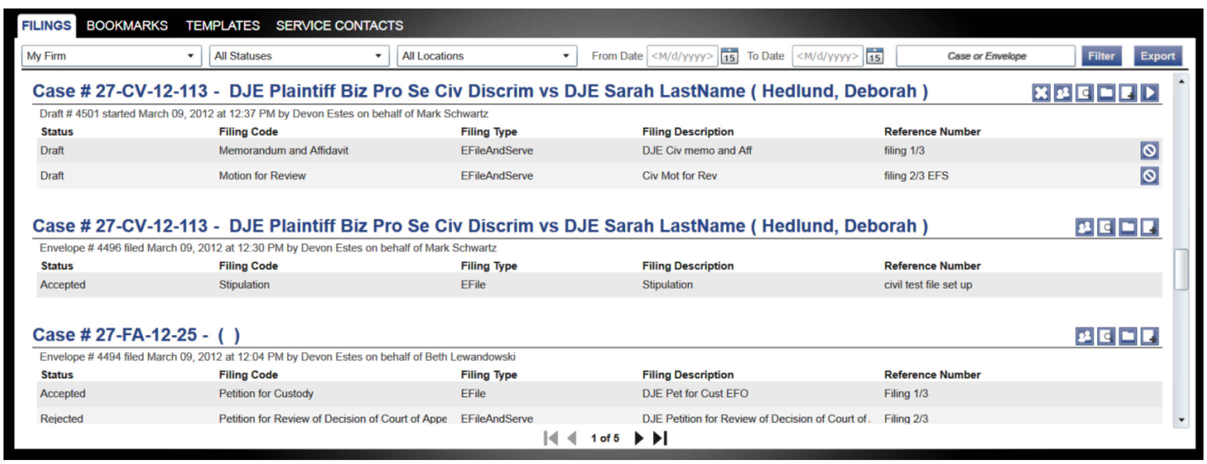


Figure 12.9 – Filings Screen

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 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.

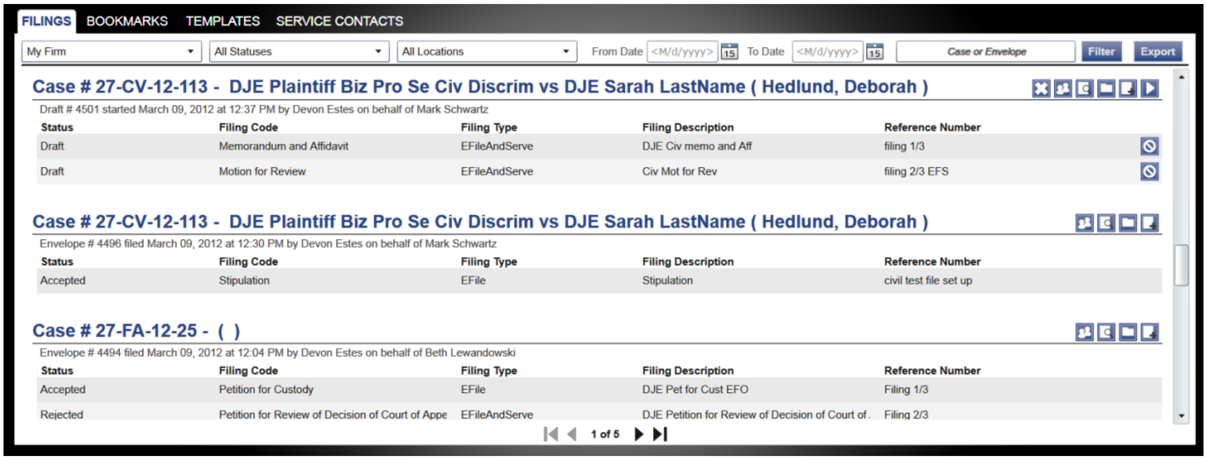


Figure 12.10 – Filings Screen

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  icon 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.

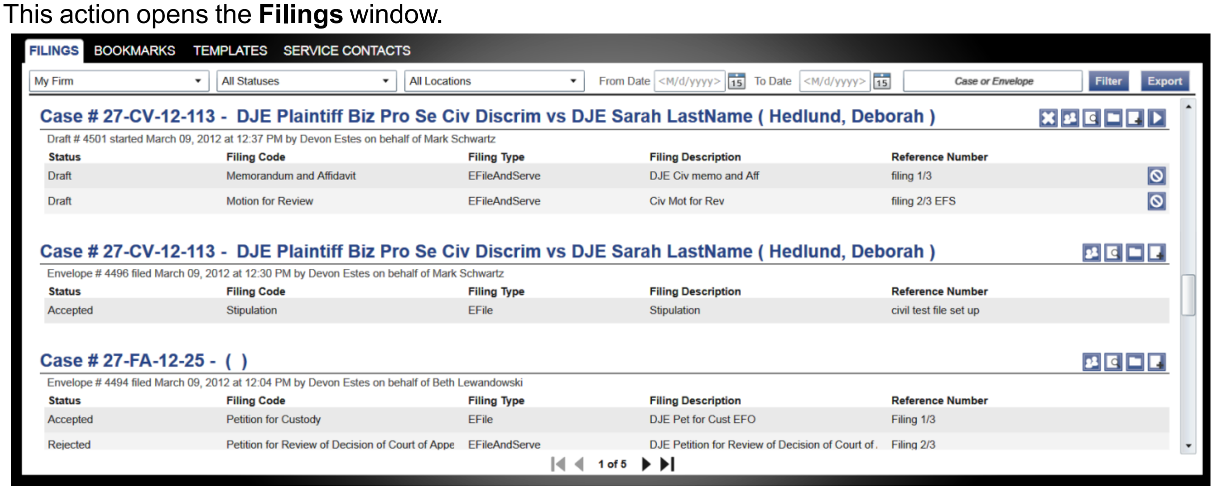


Figure 13.1 – Filings Window

2. Locate the case that you want to add service contacts.

3. Click the icon to add a service contact to the selected case.

   This opens the **Manage Case Service Contacts** window.

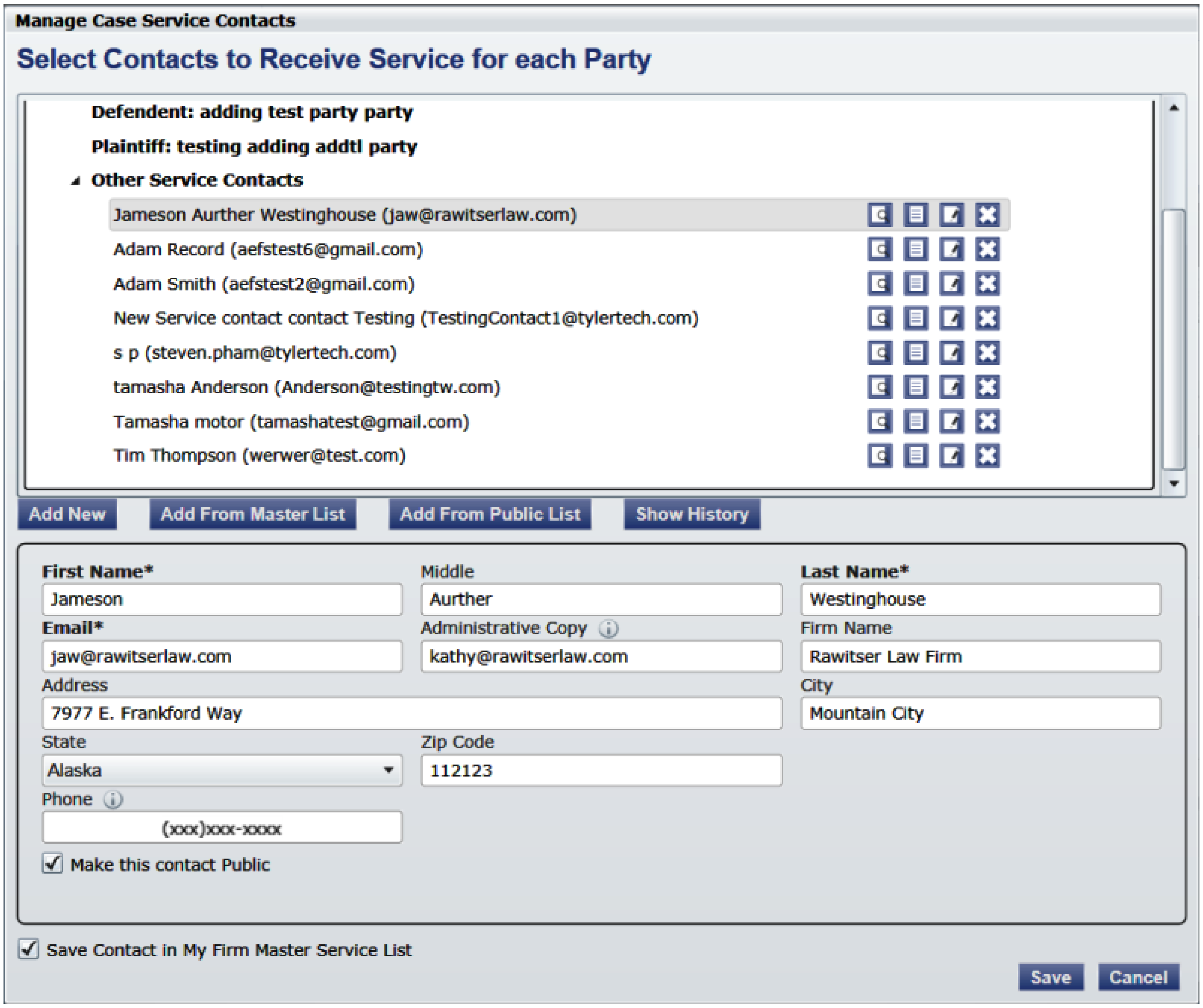


Figure 13.2 – Manage Case Service Contacts Window

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.

   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.

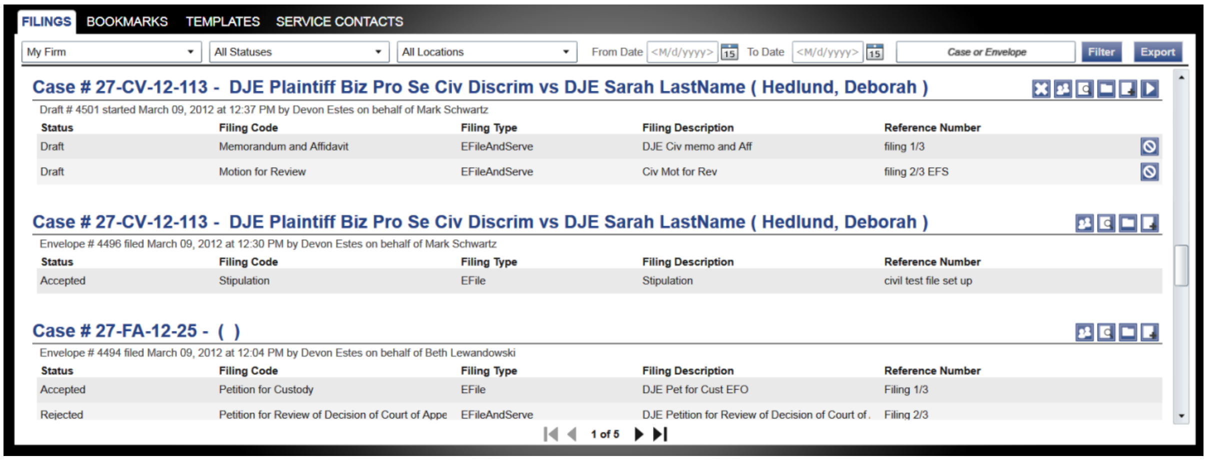


Figure 13.3 – Filings Window

2. Locate the case that you want to add the service contact to.

3. Click the icon to view the service contact information.

   This opens the **Manage Case Service Contacts** window.

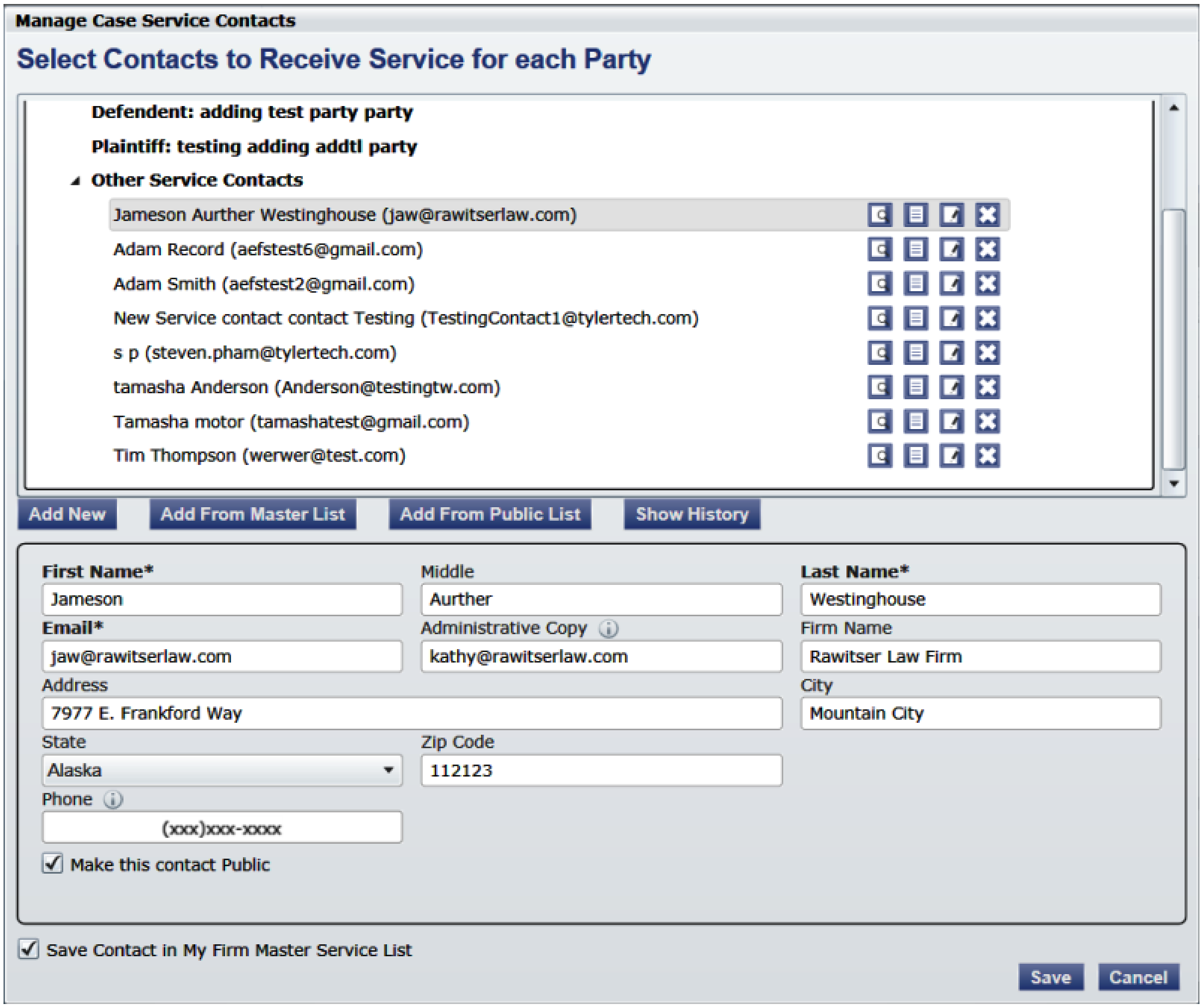


Figure 13.4 – Manage Case Service Contacts Window

4. Click the **Add From Master List** button.

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

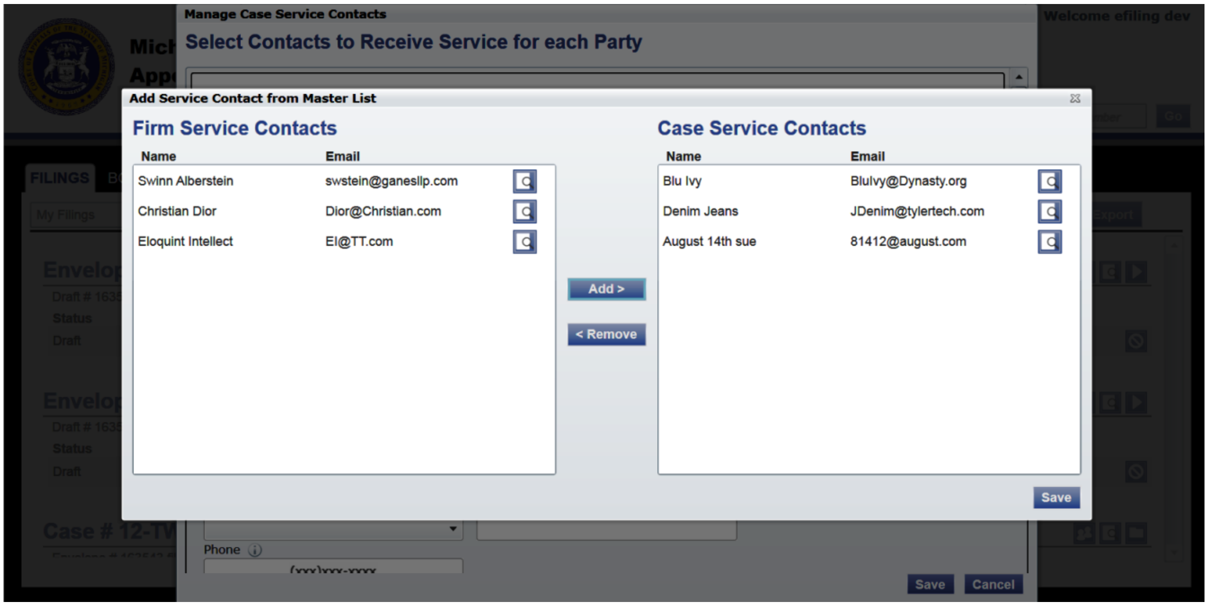


Figure 13.5 – Add Service Contact from Master List Window

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.

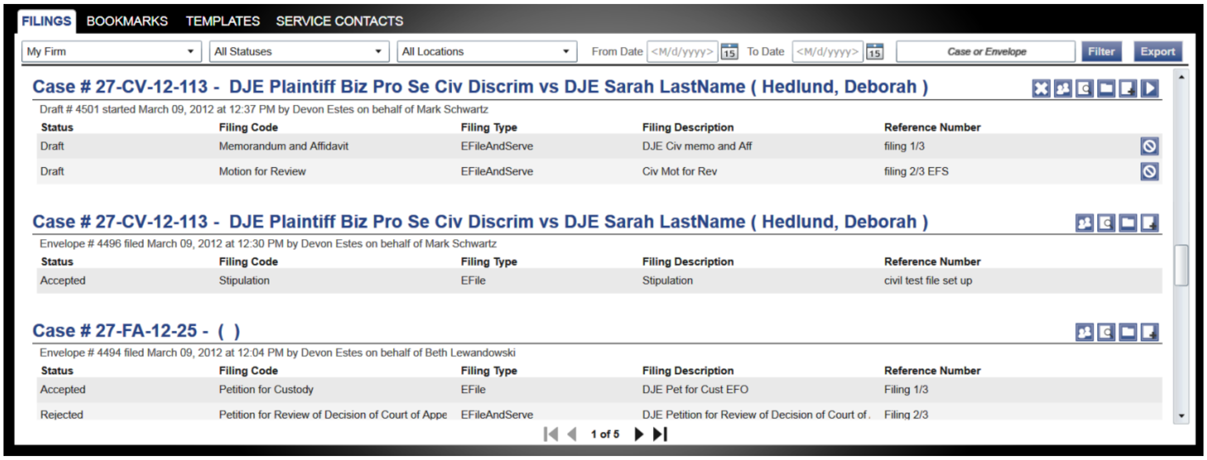


Figure 13.6 – Filings Window

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

   This opens the **Manage Case Service Contacts** window.

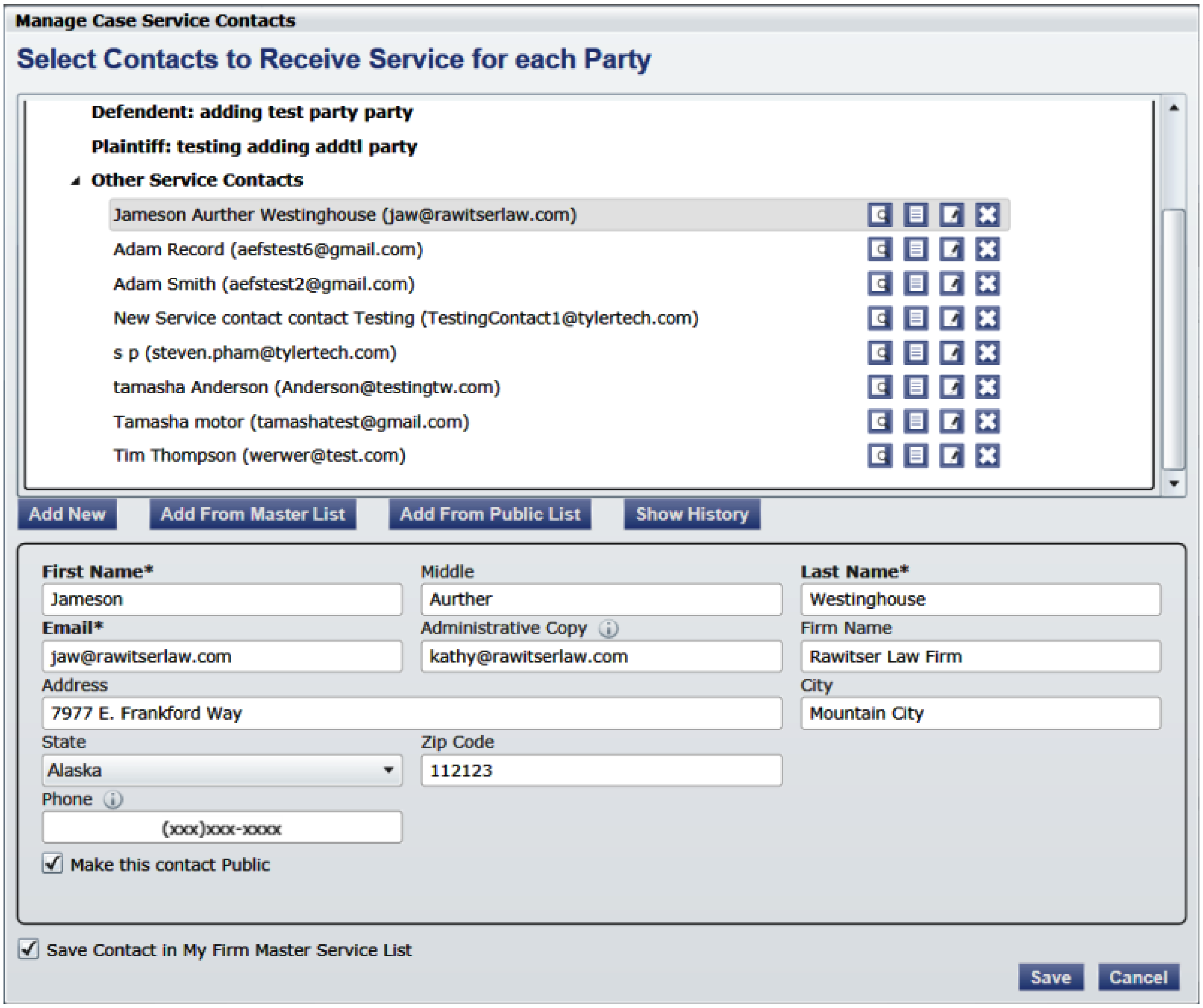


Figure 13.7 – Manage Case Service Contacts Window

4. Click the **Add From Public List** button.

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

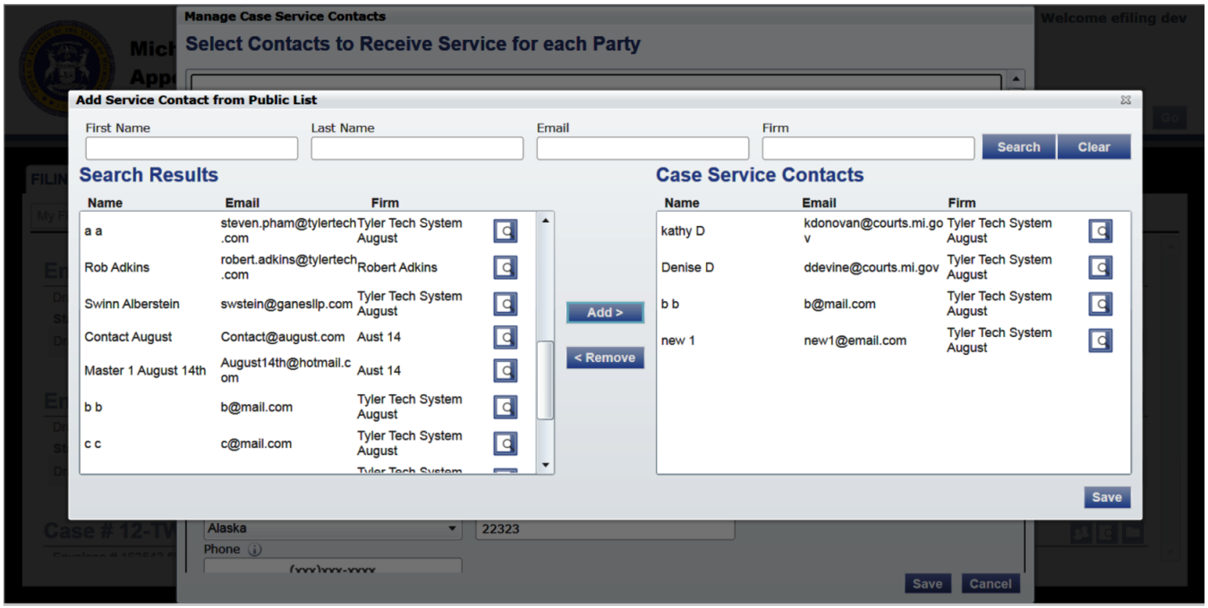


Figure 13.8 – Add Service Contact from Public List Window

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.

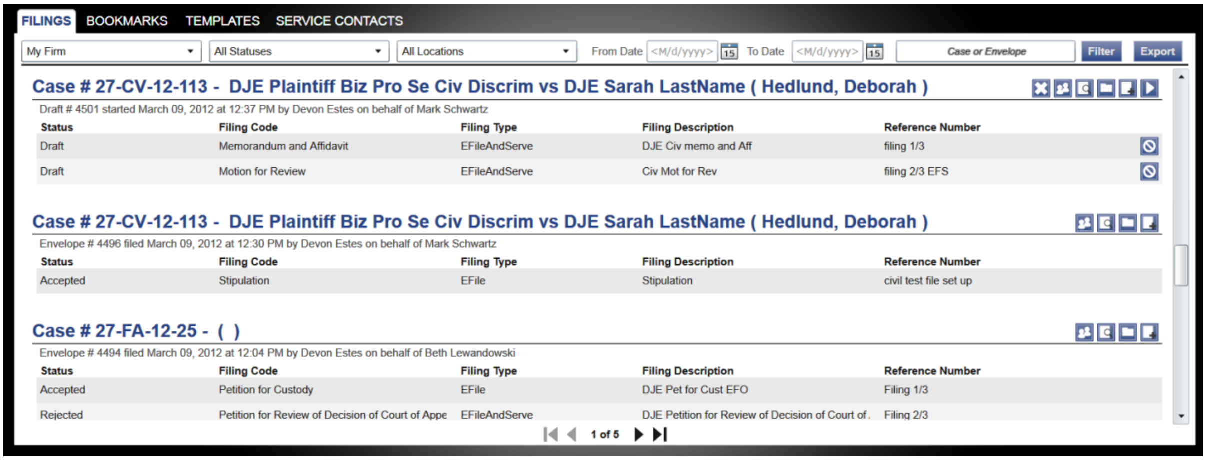


Figure 13.9 – Filings Window

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

   This opens the **Manage Case Service Contacts** window.

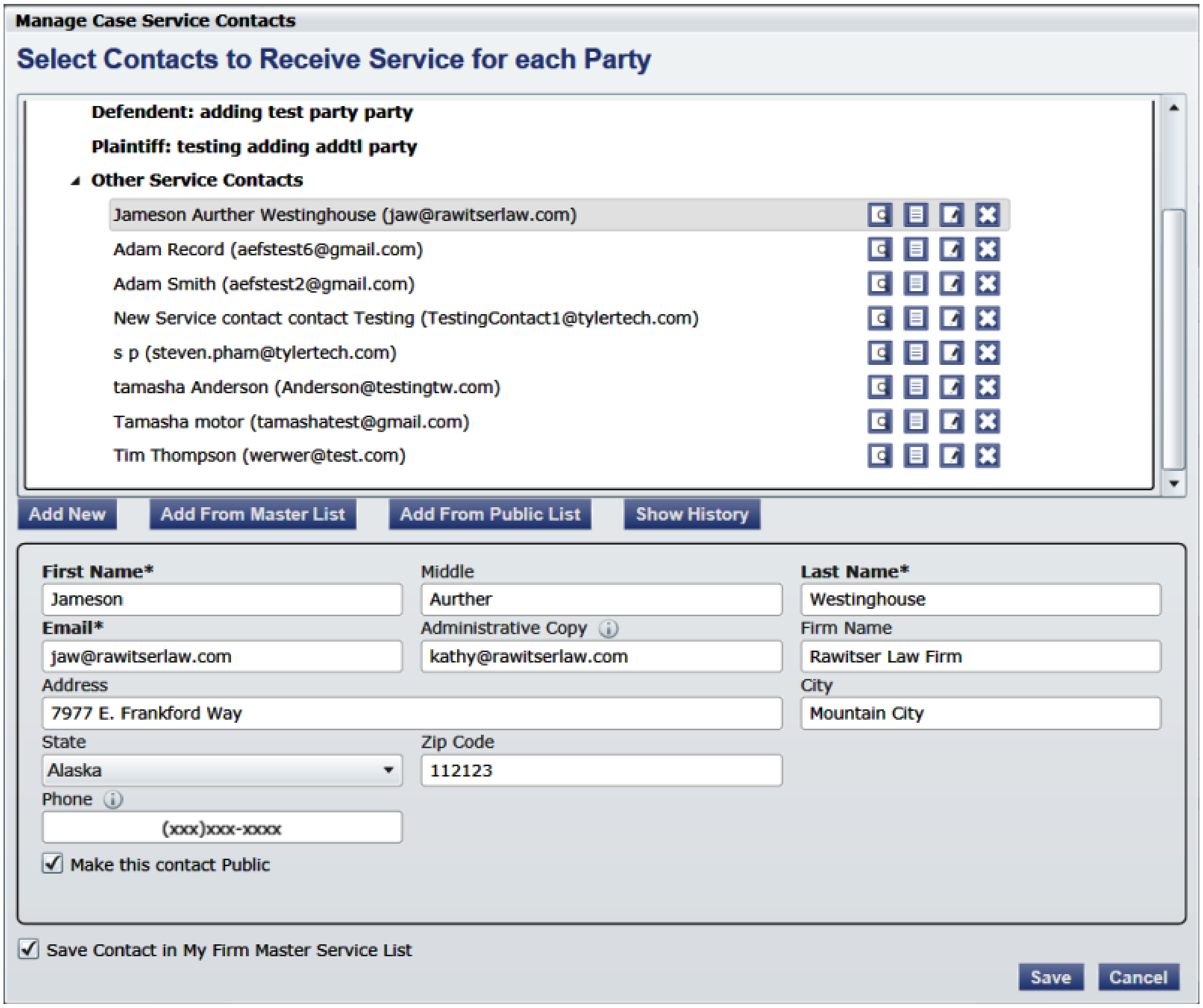


Figure 13.10 – Manage Case Service Contacts Window

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

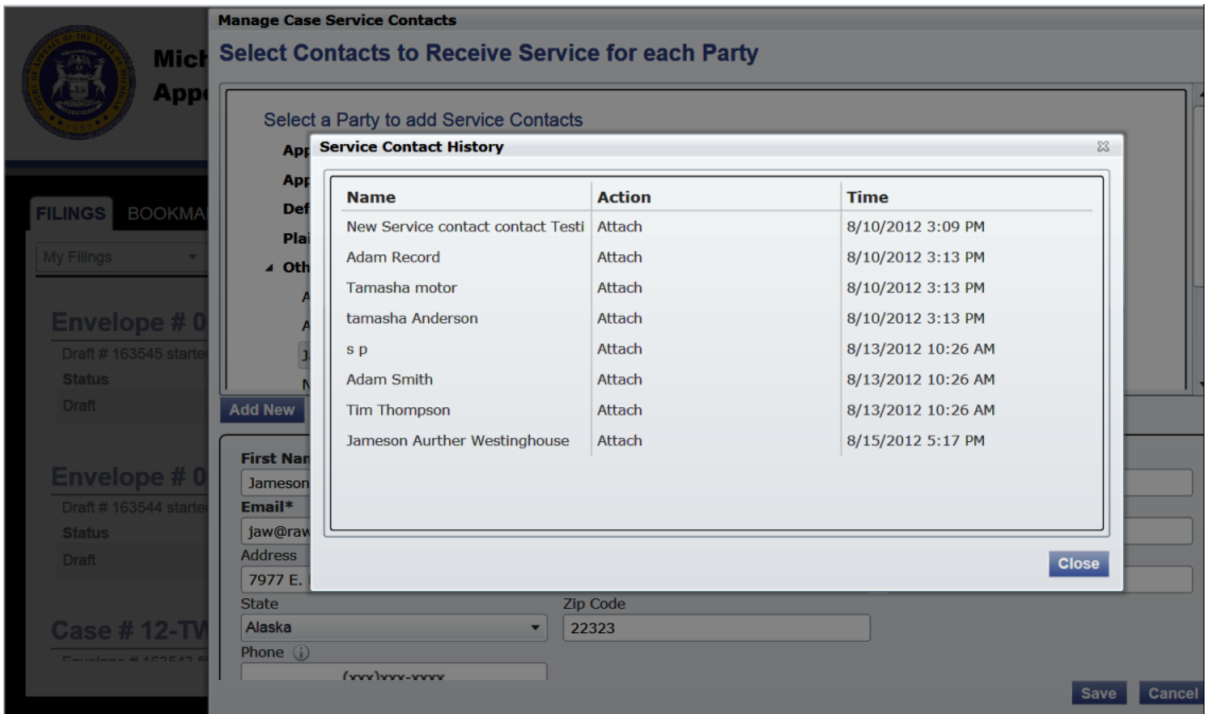


Figure 13.11 – View Service Contact History

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.

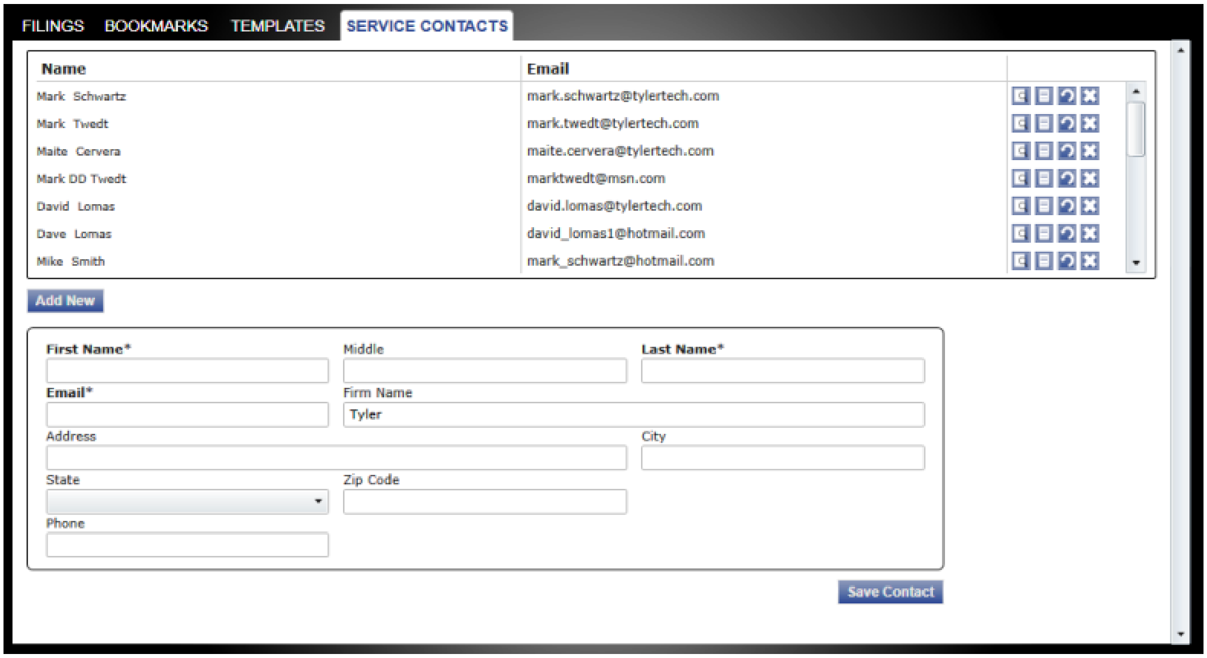


Figure 13.12 – Service Contacts Screen

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

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.

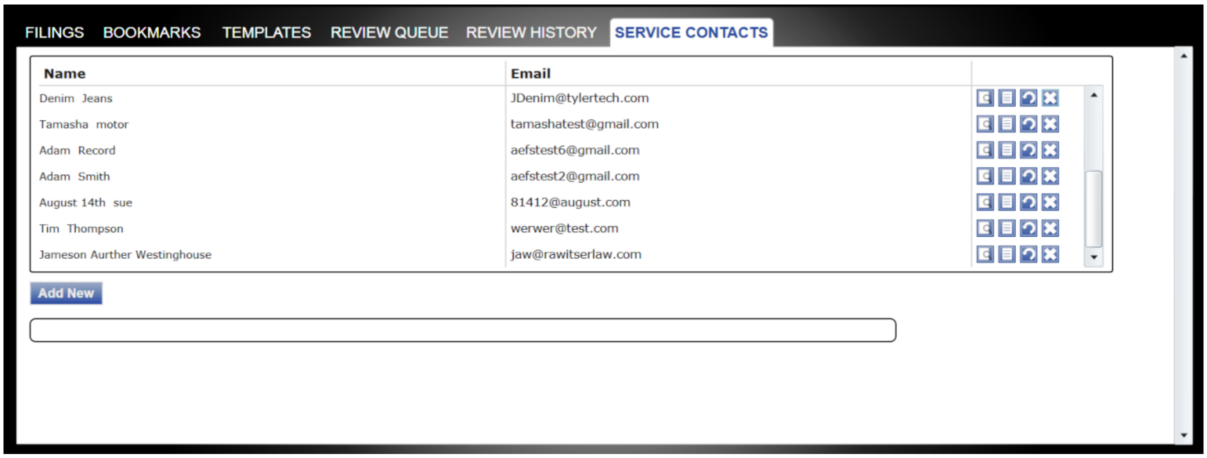


Figure 13.14 – Add New Firm Service Contact Form

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.

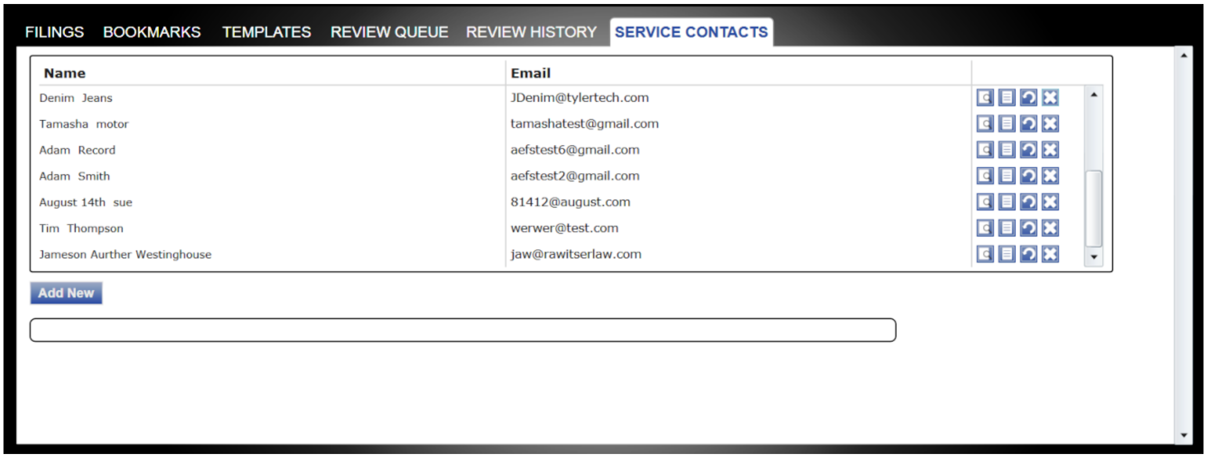


Figure 13.15 – Replacing Service Contacts Form

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

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.

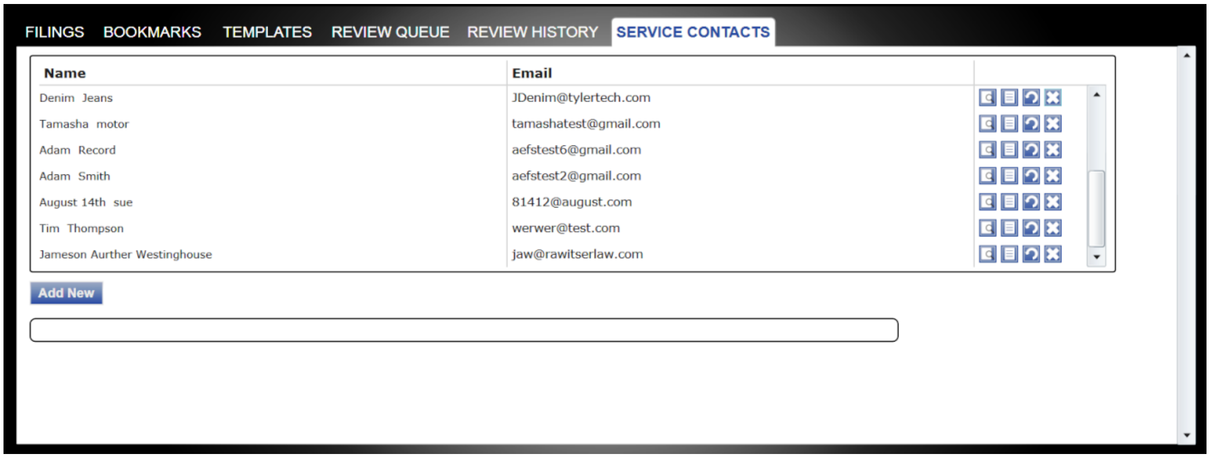


Figure 13.16 – Deactivating Service Contacts Form

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

   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.