



# Odyssey® File & Serve™ Quick-Reference Guide

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## Registering as a User with an Existing Firm

You can register as a user if your Firm Administrator has already registered with the system 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 you search for the name, and you must contact the Firm Administrator to be registered.

To register as a user in the firm, perform the following steps:

1. Click **Register Now** in the login section.

The Odyssey File & Serve Registration Wizard is displayed.

**Note:** There is no fee to sign up for the product.

**Note:** Registration options vary by site.

2. Select the **User with an Existing Firm** option.
3. Click **Next** to select your firm, or click **Cancel** to cancel the registration process.
4. Type your firm name in the **Firm Name** field, or click **Search** to view a list of all available firms. Select your firm name from the list.
5. Click **Next** to enter your account information, click **Previous** to return to the previous page, or click **Cancel** to cancel the registration process.

**Note:** An asterisk (\*) indicates required information.
6. Complete the **User Information** form.
7. Type a simple security question in the **Security Question** field. (Example: What was your high school mascot?)
8. Type a security answer in the **Security Answer** field.

**Note:** Select the **I am also an Attorney** check box 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.

**Note:** Click **Verify** if prompted. This action verifies that your attorney number is in the system.
9. Click **Register**.

The system displays the **Your Registration is Complete** message.

10. Record the login details displayed for your records.

11. Click **Finish**.

## Registering as an Independent User

You can register as an “independent user” if you are a single user of the system. A single user is a user who is not associated with any firm or represented by any firm.

**i Note: Refer to your local court’s website before registering as an independent user because the registration options may vary.**

To register as an independent user, perform the following steps:

1. Click **Register Now**.

**i Note: There is no fee to sign up for e-filing.**

2. Select the  **An Independent User** option.

3. Click **Next** to continue, click **Previous** to go back, or click **Cancel** to cancel the registration process.

4. Read the Usage Agreement before proceeding.

5. Select the  **I Agree** check box to accept and agree to the terms listed on your page.

6. Click **Next** to continue, click **Previous** to go back, or click **Cancel** to cancel the registration process.

7. Complete the **Contact Information** form.

8. Click **Next** to continue, click **Previous** to go back, or click **Cancel** to cancel the registration process.

9. Complete the **User Information** form.

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

**i Note: Your security question is required to restore your password in case you forget your password.**

11. Type a response in the **Security Answer** field.

12. Click **Register**.

The message *Your Registration is Complete* is displayed.

13. Click **Finish**.

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

Your registration is complete. Access your *Home* page to log in.

## Logging In

To log in, perform the following steps:

1. Access your *Home* page.
2. Type your email address and password (case-sensitive) in the fields provided.
3. Click .

## Filing a New Case

You can file a new case by using the *Case Information* page.

A payment account must be set up prior to filing a new case.

To file a new case, perform the following steps:

1. Click **NEW CASE**.

The *Case Information* page is displayed.

**Note:** An asterisk (\*) indicates required fields.

2. Select your court location from the **Select Location** drop-down list.
3. Select a case category from the **Select Category** drop-down list.
4. Select a case type from the **Select Case Type** drop-down list.

**Note:** The case type can be configured to mask the text that would be displayed for the case category and case type values. The masking is configured by Tyler at the court's request. It may not be available on your system.

5. Select the case sub type from the **Select Case Sub Type** drop-down list.

**Note:** The Case Sub Type feature is configured by Tyler and may not be available on your system.

6. If you want, type a short title for the case in the **Short Title** field.
7. Select a filing attorney from the **Filing Attorney** drop-down list.
8. Select the filer type from the **Filer Type** drop-down list.
9. Select a payment account from the **Payment Account** drop-down list.

10. Click  to save the case information and to continue.

**Note:** Once you click , the system automatically saves a draft of the pages where all of the 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 **WORKSPACE**, find your case on the *Filings* page, and click .

## Entering Party Details

Each case requires a party type.

To enter the details for the parties involved in the case, perform the following steps:

1. Click **Parties** on the *Case Information* page.
2. Select the  I am this party check box to indicate you are the party.
3. Choose the party type from the list in the **Party Type** column. You can also select the party type from the **Party Type** drop-down list.

**Note:** Defendant and Plaintiff are used as examples in the screen shot.

4. Select either the **Person** check box or the **Business** check box, as appropriate.
5. Select the attorney from the **Lead Attorney** drop-down list.
6. Click **Close** to close the page.
7. Type the party name in the fields provided.

**Note:** An asterisk (\*) indicates a required field.

8. Type the party's date of birth in the **Date of Birth** field, or click the date on the calendar.
9. Type the party's email address in the **Email Address** field.
10. Select the country from the **Country** drop-down list.

**Note:** Foreign address fields are included to allow for non-U.S. addresses.

Note the following details:

- The following applies when the country listed is Canada:
  - The **State** field is displayed as **Province**.
  - If provinces are configured, then the **Province** field consists of a drop-down list of Canadian codes; otherwise, the **Province** field consists of a free-form text box.
  - The **City** field is displayed as **Municipality**.
  - The **Zip Code** field is displayed as **Postal Code**.
- The following applies when you select other foreign countries:
  - The **State** field is displayed as **Region**.
  - If regions are configured, then the **Region** field consists of a drop-down list with region codes; otherwise, the **Region** field consists of a free-form text box.
  - The **City** field is displayed as **Municipality**.
  - The **Zip Code** field is displayed as **Postal Code**.

11. Complete the remaining address fields for the party.

12. Type the filer ID in the **Filer ID** field.

**Note:** The Filer ID field is configured by Tyler and may not be available on your system.

13. Select the party's driver's license type from the **Drivers License Type** drop-down list.

14. Select the state where the party's driver's license was issued from the **Drivers License State** drop-down list.

15. Type the party's driver's license number in the **Drivers License Number** field.

16. Type the party's Social Security number in the **Social Security Number** field.

17. Select the party's gender from the **Gender** drop-down list.

18. If an interpreter is needed, select the language from the **Interpreter** drop-down list.

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

**Note:** When more than 100 parties are on a case, only the first party of each required party type will be displayed, along with a message that additional parties are not displayed due to system constraints.

20. Click **Filings** to save the party details, or click **Case Information** to display the previous page.

## Entering Filing Details

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

To enter the filing details for the case, perform the following steps:

1. Click **Filings** on the *Parties* page to enter the filing details.

The *Filings* page is displayed.

**Note:** The wording displayed on your system may differ from the example provided.

2. Select the filing code from the **Select Filing Code** drop-down list.

3. Select the **E-File** check box to electronically file the case.

4. Select the **Service** check box to electronically serve the case.

5. Enter a brief description in the **Filing Description** field of the filing associated with the filing code previously selected.

6. In the **Reference Number** field, type the reference number of your choice that you can refer back to for this filing.

**Note:** A reference number is a client-created number and is for internal purposes only. Most courts do not see or refer to the Reference Number field for the filing. This is an optional field.

7. In the **Optional Services** section, select an optional service from the **Optional Services** drop-down list.

The *Fee Adjustments* dialog box is displayed.

**i Note:** The wording displayed on your system may differ from the example provided.

8. Enter the fee amount for the optional service, and then click



The fee that you entered is displayed in the *Fee Adjustments* dialog box.

9. Select the parties to associate with or disassociate from the case.

10. Select the lead document for this filing, as follows:

- a. Click *Click to Browse* to select and upload a lead document.

This action opens Windows Explorer on your computer.

- b. From the list of files, select a document to upload.

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

- c. Click  to attach the file.

**i Note:** The maximum length for a document description is 40 characters.

- d. Wait as the document uploads.

**i Note:** Click  to delete the uploaded document.

- e. Type a description of the uploaded document in the **Description** field.

- f. Select a security option for the document.

11. From the list of files, select the attachments to upload for this filing, as follows:

- a. Click **Add More Documents** to select an attachment.

This action opens Windows Explorer on your computer.

- b. From the list of files, select the attachments to upload.

**i Note:** Multiple documents can be uploaded as attachments simultaneously.

**i Note:** The system provides a way to upload a file type that is not converted into Portable Document Format (PDF). Users can download and view the files externally by using the Rich Text Format (RTF).

**i Note:** The Auxiliary Filing feature enables filers to upload an editable RTF version of a document to the court. For example, many courts require documents to be in PDF format; however, a judicial officer may want an editable version of the document sent to the court so that the document can be modified in the Proposed Orders. As a result, the filer would submit both the PDF and RTF versions of the same document. The RTF version is used only if the judge is making changes to the filing.

- c. Click  to attach the file.

- d. Wait as the attachment uploads.

**Note:** Click  to delete the uploaded attachment.

- e. Type a description of the uploaded attachment in the **Description** field.
  - f. Select a security option for the attachment.
12. In the **Filing Comments** field, type the filing comments for the court reviewer to read.
  13. In the **Courtesy Copies** field, type the email addresses of the parties to receive courtesy copies of this filing.
  14. In the **Preliminary Copies** field, type the email addresses of the parties to receive preliminary copies of this filing.
  15. Click  to select a due date.
  16. Review the filing fees.

**Note:** Your credit card is authorized when it is submitted; however, the transaction fees will not post to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.

17. From the **Payment Account** drop-down list, select a payment account to pay the filing fees.
18. From the **Filer Type** drop-down list, select a filer type for the payment account used to pay the filing fees.
19. From the **Party Responsible for Fees** drop-down list, select the party responsible for the filing fees.

**Note:** If the payment account selected is Waiver, the Party Responsible for Fees field may not be displayed.

20. To add another filing to the case, click , and enter the filing details in the required fields.
21. Click  to save the filing details when you are done, or click  to return to the previous page.

## Selecting Contacts to Receive Service

The *Service Contacts* page allows you to select the contacts that you want to receive service for the case.

To select the service contacts to receive service, perform the following steps:

1. Click  on the *Filings* page to select the service contacts.
2. Select the check box next to the name of the service contact to add to the case, or click  to add a new service contact.

The fields required to add a service contact are displayed.

3. Complete the **Add Service Contact** form by providing the applicable information.

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

4. Type an email address in the **Administrative Copy** field.

The administrative email is an optional additional email 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 public.
6. Select the **Save Contact in My Firm Master Service List** check box to save the contact to the firm's master service list.
7. Click **Save** to save the contact.
8. Select the check boxes next to the service contact names that you want to receive service.

**i Note: If you forget to add your name to the service contact list, the system will automatically add it for you, if the system is configured to do so.**

9. Click **Summary** to save the selected contact and view the case summary, or click **Filings** to return to the previous page.

## 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 must be assigned to the case to complete the filing process.

To view the case summary, perform the following steps:

1. Click **Summary** on the *Filings* page to view the case summary.

The *Envelope and Filings Summary* page is displayed. Here, you can view the case information, the parties involved in the case, the service contacts, the filing codes, the filing fees, the payment accounts, and the filing attorney for the case.

**i Note: Fields that contain protected data that is masked by configuration, such as the case category and case type, are displayed as asterisks.**

**i Note: The system prevents users from changing an envelope that has already been submitted.**

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

## Filing into an Existing Case

You can file into an existing case once you have initiated a case.

1. Click **WORKSPACE**.

The *Filings* page is displayed.

2. Locate your case on the *Filings* page.

3. Click  to file into the case.

4. Enter the details for the parties involved in the case.

**i Note: The courts can prevent users from adding new parties on subsequent filings.**

5. Click **Filings** to save your entries and continue.

6. Enter the filing details for the case.

A filer is required to resubmit documents when changing a filing code.

**i Note: An error message is displayed instructing the filer to resubmit documents if the current filing code has changed.**

7. Click **Service** to save your entries and continue.

8. Select the contacts to receive service for this envelope.

9. Click **Summary** to save your entries and view a summary of the case.

10. Click **Submit** to submit the filing.

## Case Search

You can search for a case by selecting a location and entering a case number or a party name.

**i Note: Some cases are restricted by source type. If you attempt to file into a restricted case, an error message will be displayed, and you will not be able to access that case.**

## Searching for a Case

You can search for a case by selecting a location and then entering the case number or the party name in the search field.



Figure 1.1 – Case Search Option

To search for a case, perform the following steps:

1. Click the drop-down arrow to select a location.
2. Type the exact case number assigned by the court, or type the party's name in the search field.

**i Note: No wild cards can be used in the search field.**

3. Click **Go**.

The *Case Search* page displays the case that meets the criteria that are entered in the search field.

**Note:** Fields that contain protected data that is masked by configuration, such as the case category and case type, are displayed as asterisks.

4. Click an icon under the **Actions** column and perform actions as necessary, or click **Close** if you do not want to perform any further actions.

## Advanced Search

The Advanced Search feature provides the ability to search by party name using a person's name or a business name. The Advanced Search feature includes the ability to filter a search by party name based on the location or the case type.

### Performing an Advanced Search by Person

Search for a case by selecting a location and entering a case number or a party name. The Advanced Search feature provides the ability to search by party name using a person's name.

**Note:** An asterisk (\*) indicates a required field.

**Note:** Color themes can vary by site.

To run an Advanced Search using the **Person** option, perform the following steps:

1. Click **Advanced Search** in the **New Case** section.

The *Advanced Search* dialog box opens.

2. Select the **Person** check box.

**Note:** Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses listed in the case management system, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.
4. Click **Search** to continue, or click **Cancel** to cancel. Click **Reset** to reset the form.

The search results are displayed.

## Technical Support Contact Information

The Odyssey File & Serve Technical Support Team is available to assist all users by calling 800-297-5377 Monday through Friday between the hours of 7:00 a.m. to 9:00 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an email to [efiling.support@tylertech.com](mailto:efiling.support@tylertech.com) or by using the [Support Chat](#) option.

Support may ask to assist you by sharing your screen using [GoToAssist](#).