Odyssey File & Serve™ HTML5

Firm User Guide – Release 3.16

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PUBLISHING HISTORY

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Chapter 1 System Overview

Topics Covered in This Chapter

The File & Serve system 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.

Release 3.16 New Features

This section lists the new features for Release 3.15.

Note: Features vary based on your system configuration.

Addition of a Cancel Icon on the Filing History Page

The system has been updated so that a Cancel icon ( ) has replaced the **Actions** menu for a submitted filing listed on the *Filing History* page. The icon is displayed only for filings that can be canceled.

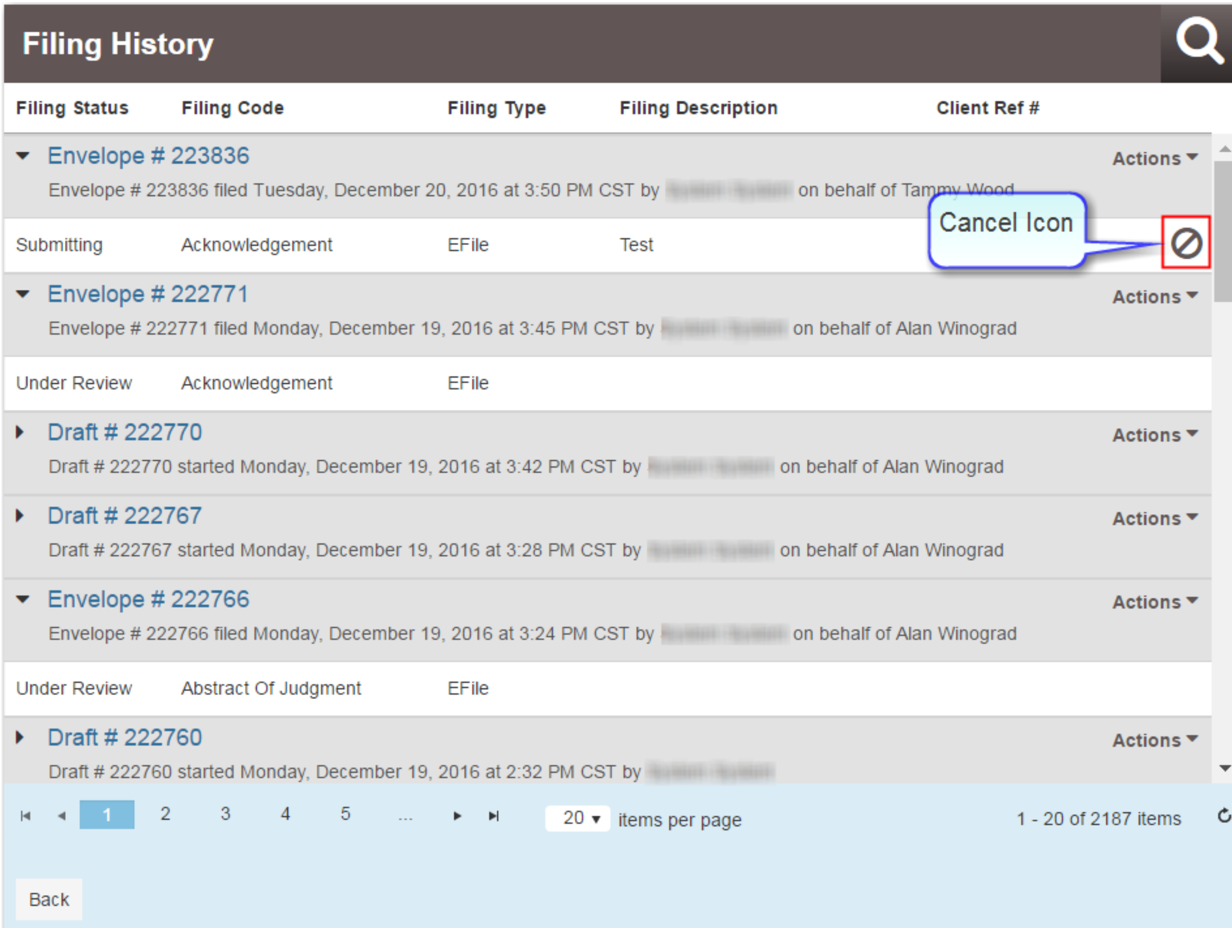


Figure 1.1 – Filing History Page with the Cancel Icon

Add Ability to Collect Date of Birth for Parties

The system has been updated to include the **Date of Birth** field in the **Party Information** section of a filing. A calendar is included in the **Date of Birth** field, so the filer has the option of typing the party's date of birth in the field or selecting the date from the calendar.

Note: The Date of Birth field is configured by Tyler and may not be available on your system.

Note: The Date of Birth field is displayed only when filers are adding a new party.

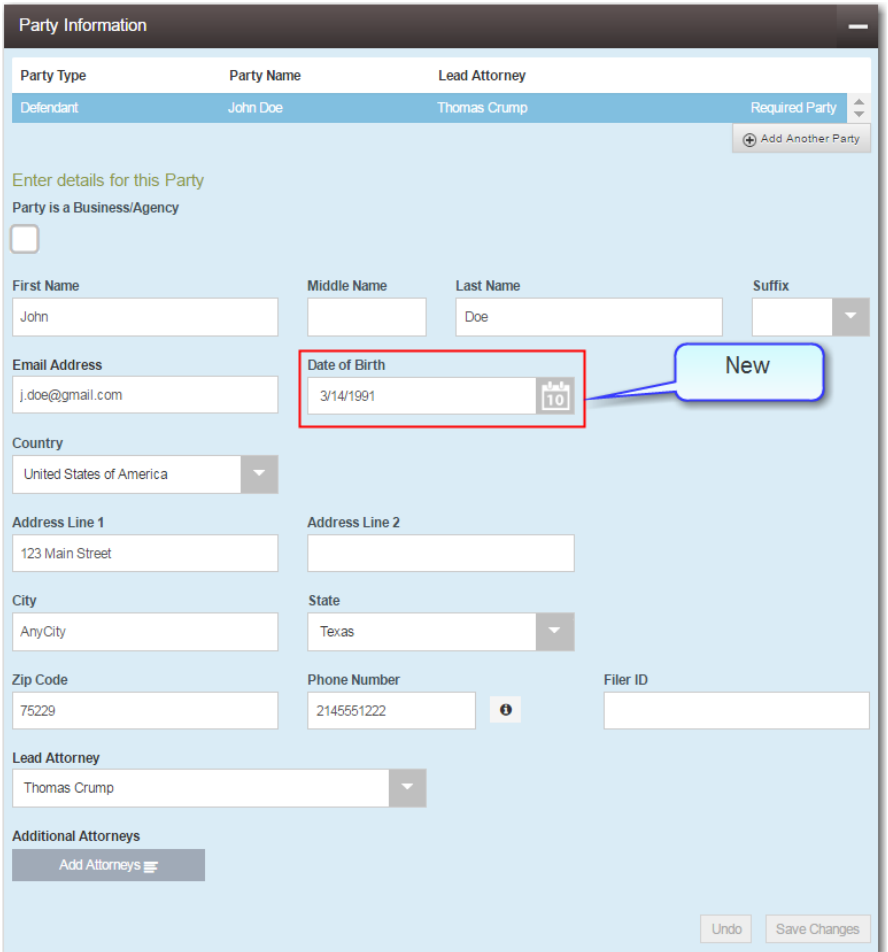


Figure 1.2 – Party Information Section with the Date of Birth Field

Before You Begin

This guide is intended for firm users.

Firm User

Only Firm Administrators can add and manage firm users. Please contact your Firm Administrator to request any changes.

Payment Accounts

Only Firm Administrators can add and manage payment accounts. Please contact your Firm Administrator to request any changes.

Attorneys

Only Firm Administrators can add and manage firm attorneys. Please contact your Firm Administrator to request any changes.

Setup

Before you begin, review this information to successfully operate the software.

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

System Requirements

This section describes the recommended requirements to successfully use the system:

- **Browser Requirements** – The system supports Internet Explorer® 10 or 11; Chrome™; Mozilla® Firefox®; or Safari® application programs. If your browser does not meet these minimum requirements, please contact your network administrator.

  Note: Safari on iOS is not supported.

- **Operating Systems** – The system supports Microsoft® Windows®, Linux®, Chrome OS™, Android™, and OS X® desktop class operating system software.

  Note: iOS is not supported.

- **Minimum Hardware Requirements** – The system supports the following hardware:
  - Intel® Core™ Duo processors or AMD processors manufactured in 2012 or later
  - 2 GB of RAM
  - 1366 x 768 resolution screens for desktop computers, or 1280 x 720 resolution screens for mobile devices
- **Recommended Hardware Requirements** – Tyler recommends the following hardware:
  - Intel® Core™ i3 or AMD A6 processors with at least a 2.0 GHz clock speed
  - 4 GB of RAM
  - 1920 x 1080 resolution for both desktop computers and mobile devices
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Document Format** – The Adobe® PDF format is the only format allowed for attaching documents in Odyssey File & Serve HTML5.

Page Navigation

The following sections describe how to navigate the system and populate data fields throughout the filing process.

Keyboard Shortcuts

At any time while you are in the File & Serve system, you can use keyboard shortcuts for assistance. Press SHIFT+? to display the following window.

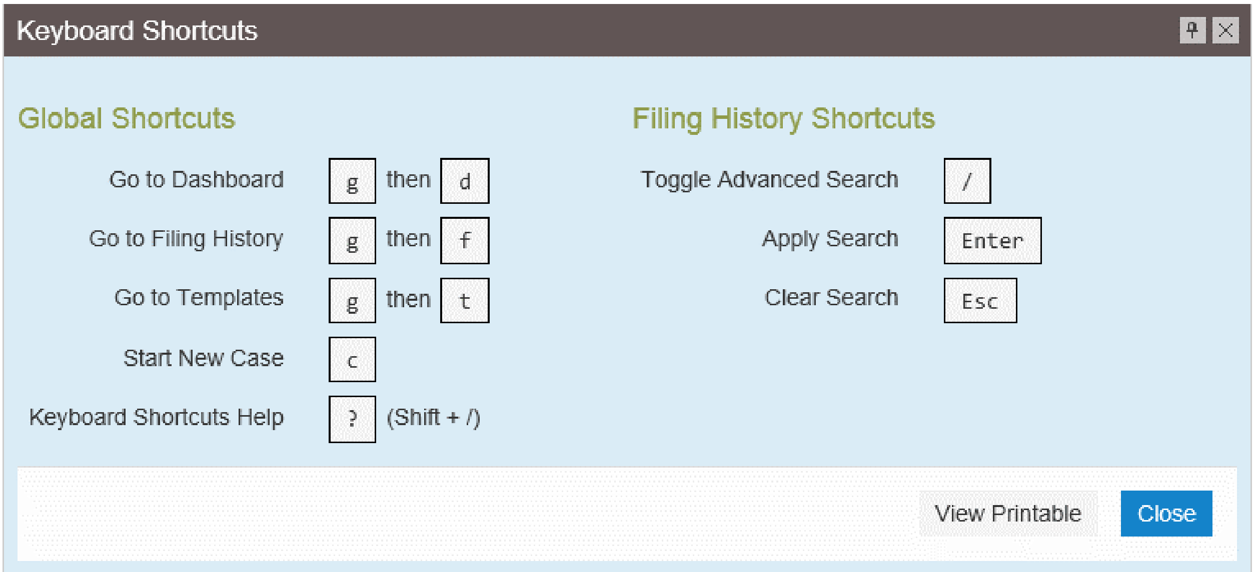


Figure 1.3 – Keyboard Shortcuts Window

Press any shortcut key to initiate an action depending on the key you pressed. The keyboard shortcuts are designed to make your experience flow more smoothly and to help you to gain efficiency in using the system.

Note: The tab key is not functional within the Safari application program.

Resume Filing

During the filing process, the system automatically saves a draft of each page on which you have completed all required fields. This feature allows you to stop work on a filing and resume at a later time. To resume filing a saved draft, navigate to the *Filing History* page and find the draft that you want to complete. From the **Actions** drop-down list, select **Resume Draft Envelope**.

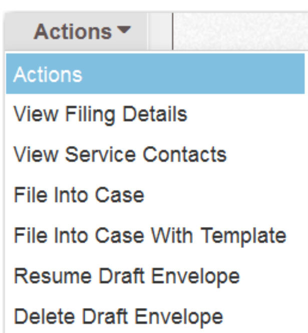


Figure 1.4 – Actions Drop-Down List

Error Messages

The system displays several error messages to alert you when either required information is not entered or invalid information is provided.

Enter Data in Required Fields

Required fields are outlined in red on your form. If the information is not entered in the required fields, you will receive error messages when you try to advance to the next page.

Note: Required fields may vary in different sections.

ORIENTATION

When you sign in to File & Serve, the *Filer Dashboard* page is displayed. From here, drop-down lists provide various filing options.

Filer Dashboard and Actions Drop-Down List

Start a new case or add a filing to an existing case, using one of two methods:

- From the *Filer Dashboard* page

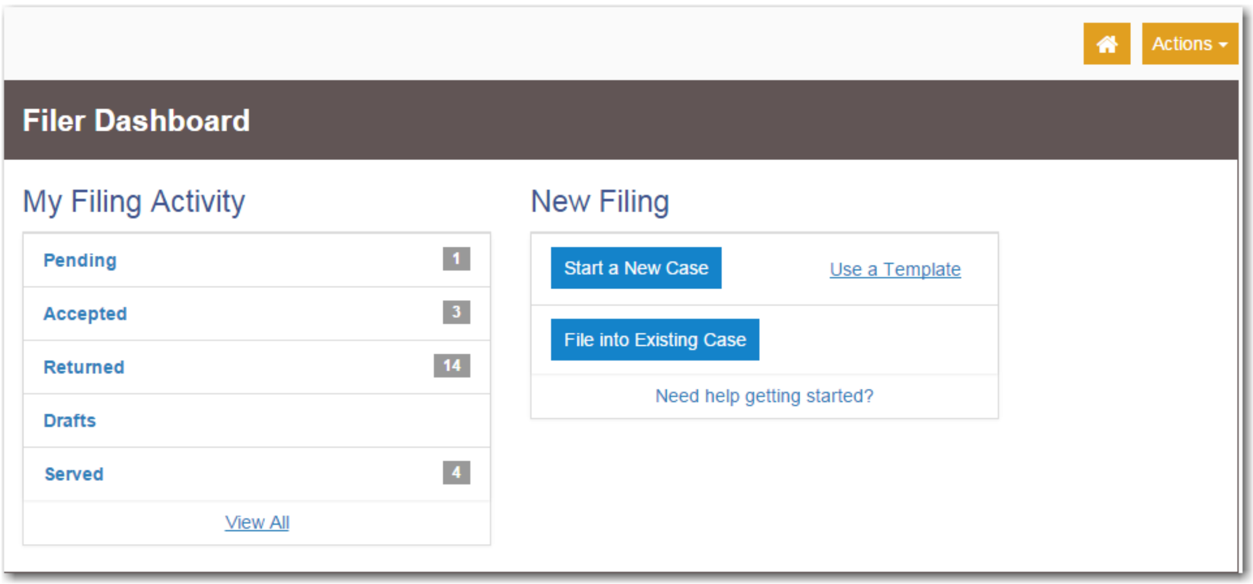


Figure 1.5 – Filer Dashboard Page

From the **Actions** drop-down list

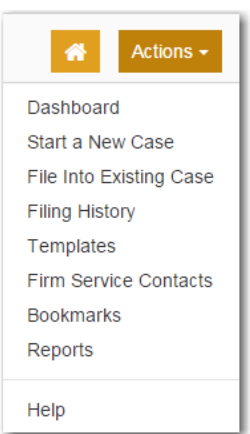


Figure 1.6 – Actions Drop-Down List

The **Actions** drop-down list can also be used for other case actions.

Click the home icon ( ) from any page in the system to return to the *Filer Dashboard* page.

Start a New Case

Click **Start a New Case** to open a new case and enter the required information. You can also select **Start a New Case** from the **Actions** drop-down list.

File Into Existing Case

Click **File into Existing Case** to locate an existing case and add a filing to the case. You can also select **File Into Existing Case** from the **Actions** drop-down list.

The *File Into Existing Case* page includes tooltips. Pause on the case type to view the tooltip associated with that case type.

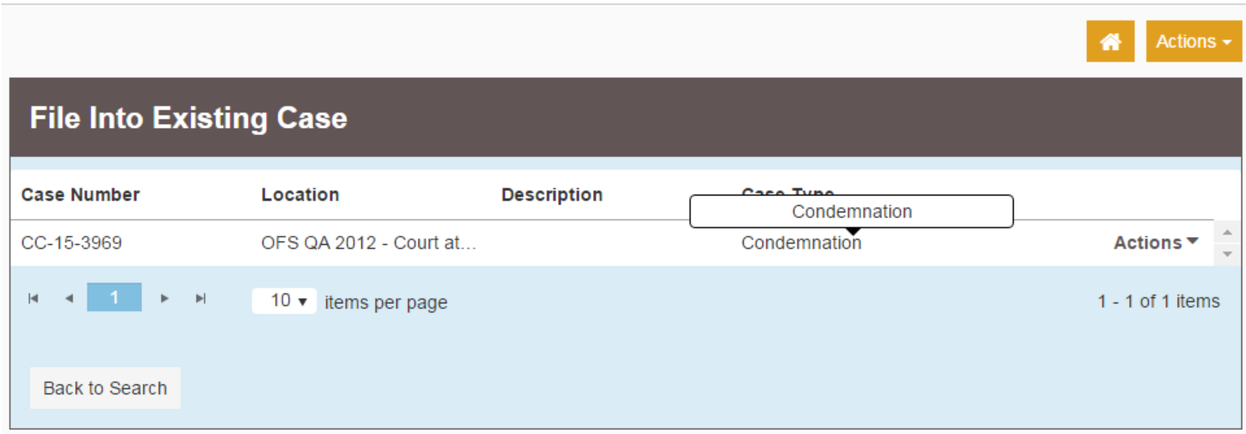


Figure 1.7 – File Into Existing Case Page with Tooltip Displayed

Filing History

After uploading and submitting your filing, it is displayed on the *Filing History* page. From here, you can view the status of your filing, check the filing type, get a document description, see the number assigned to your case, review the details of the case, and cancel a filing. You can also pause on a filing description to see the tooltip associated with that description.

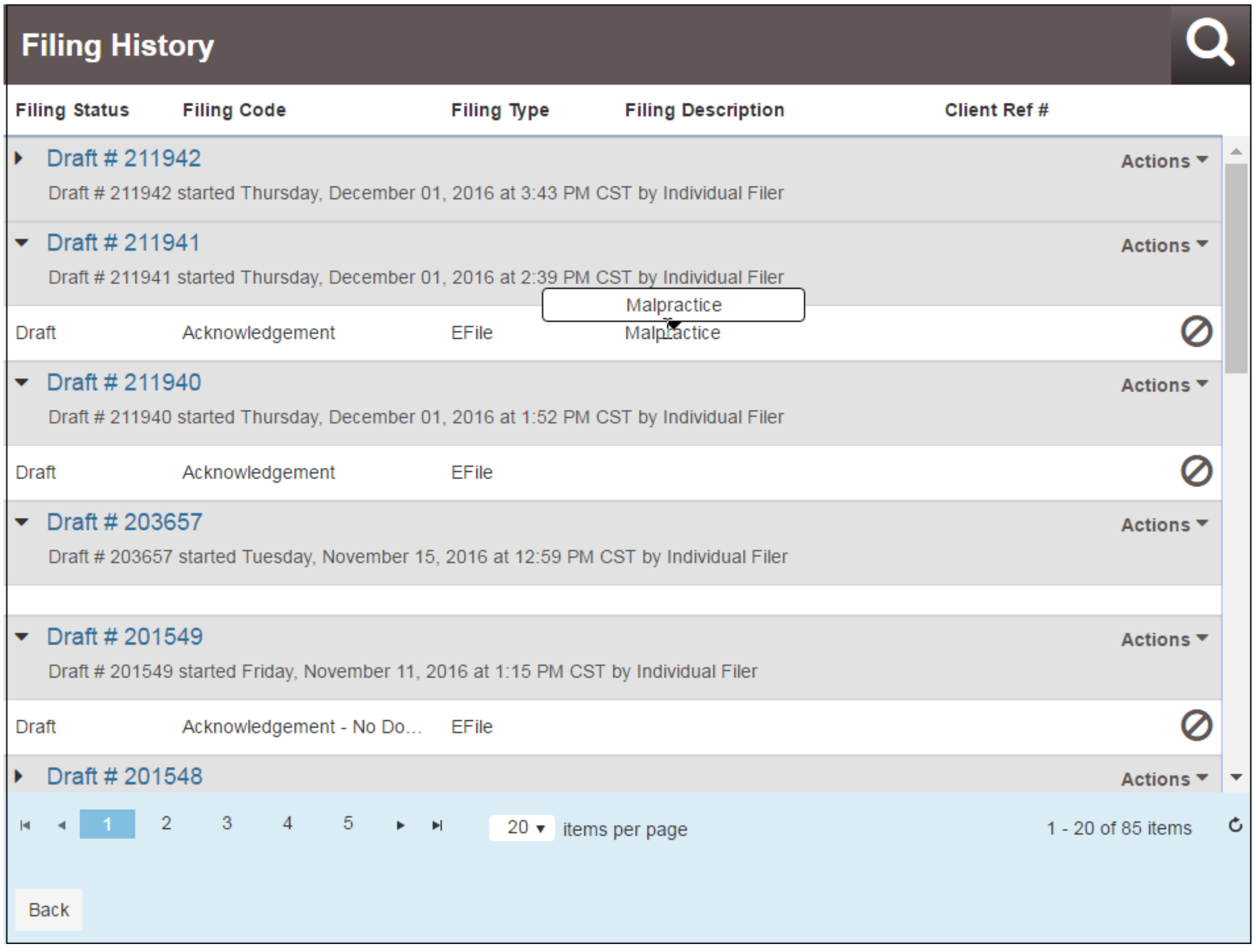


Figure 1.8 – Filing History Page with Tooltip Displayed

Templates

Envelope templates allow you to quickly file into a case or create a new case from a template that you have created, saving you time. Templates exist for new case filings and existing case filings.

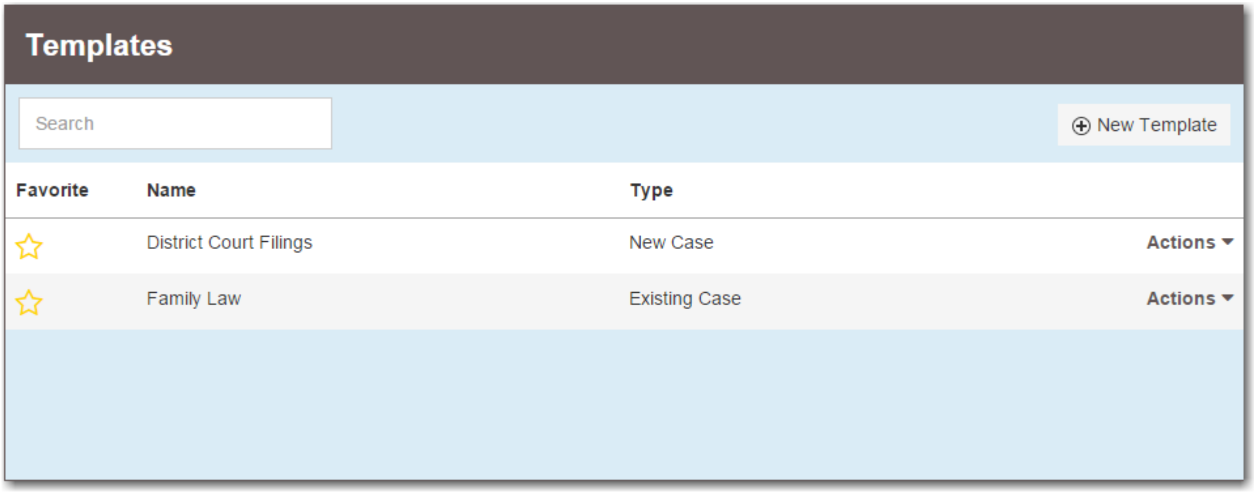


Figure 1.9 – Templates Page

Firm Service Contacts

The **Firm Service Contacts** feature displays all of the service contacts associated with your firm. Firm service contacts can also be deleted from a firm.

Bookmarks

The *Bookmarks* page displays a list of case numbers, locations, and descriptions for the cases that you have bookmarked. Only you and your firm (depending on the firm setup) can see this information. Neither the public nor any other firm can see your case list.

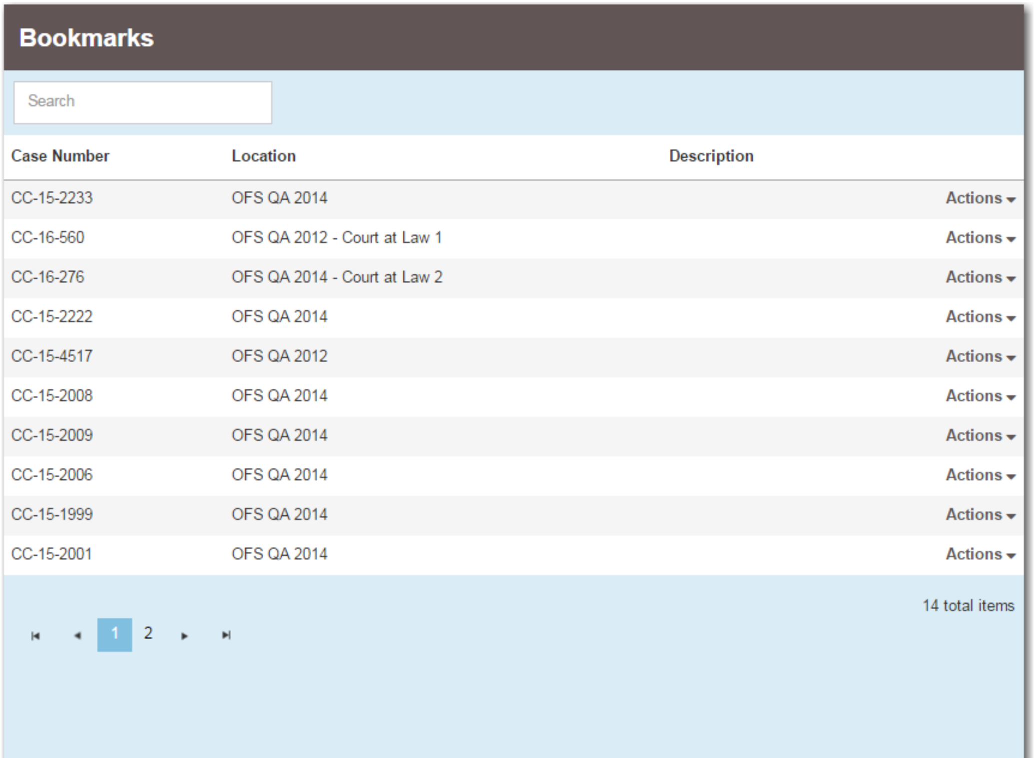


Figure 1.10 – Bookmarks Page

Reports

You can create reports on your filing activity and export the reports into an easily accessible Microsoft® Excel® file.

The Financial Reconciliation Report contains a report at the **Envelope** level that is designed to help you reconcile your filing fees to your credit card statements.

The Filings Report is a detailed look into every filing, filing status, and fee associated with the filings that your or your firm performed.

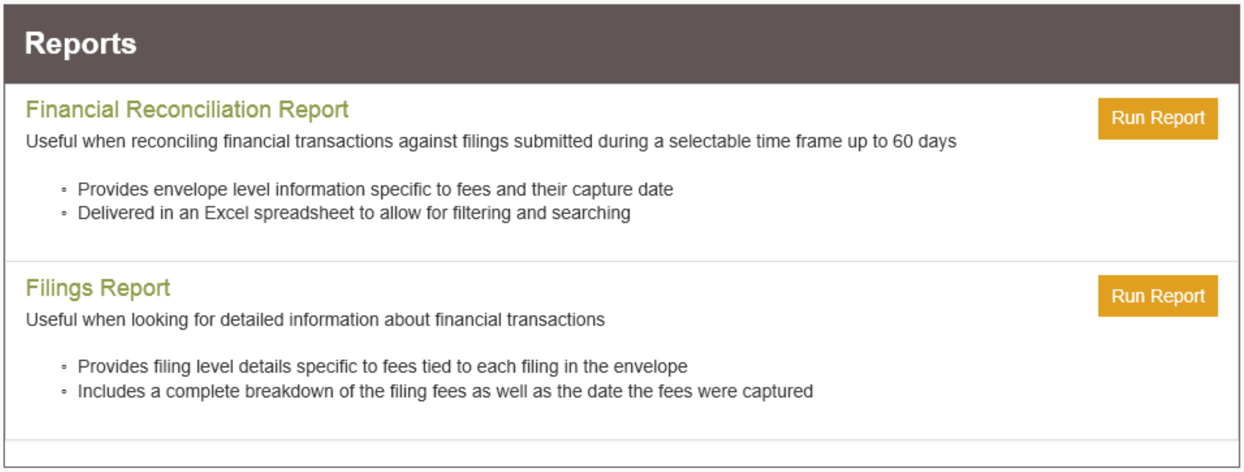


Figure 1.11 – Reports Page

Help

Select **Help** from the **Actions** drop-down list to view additional training materials, contact information, and **Self-Service Support**.

CHAPTER 2 E-FILING OVERVIEW

TOPICS COVERED IN THIS CHAPTER

♦ FILING QUEUE STATUS

This section describes the e-filing process.

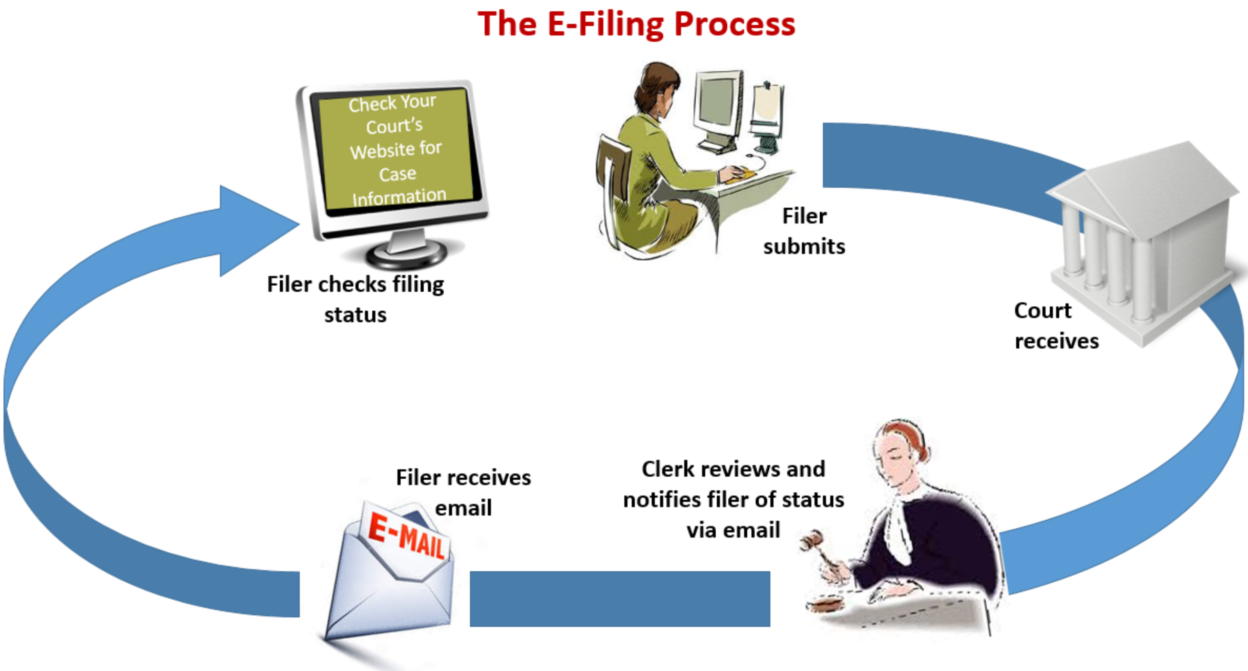


Figure 2.1 – The E-Filing Process

Once a user has registered to use Odyssey File & Serve™, a filer can electronically file documents to the court. When the filing is submitted, the filing is electronically delivered to the clerk's inbox. The clerk then reviews the filing and either accepts, rejects, or returns the filing.

If the clerk accepts the filing, the case is docketed and set to appear in the clerk's case management system. An email is sent to the filer with the case status along with any pertinent information regarding the case. If the option for service was selected during the filing, service is electronically sent to the contacts on the case.

If the filing is returned or rejected, the envelope is sent back to the filer with a reason for rejection, and the filer is given a time line in which to make the correction and resubmit the filing.

If the filer has questions regarding the filing or case, it is recommended that the filer contact the local court.

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.

Note: EFO – EFile Only; EFS – EfileAndServe; SO – Service Only

Status	Filing Type	Definition
Draft	EFO, EFS, SO	The filer has entered full or partial filing data, but has not yet submitted the filing.
Submitting	EFO, EFS, SO	The filer has submitted the filing, but the document file format and payment information have not been verified on the back end.
Submitted	EFO, EFS, SO	The document file format and payment information have been verified and accepted, but the filing has not yet entered the Review Queue/Workflow Process.
Court Processing	EFO, EFS, SO	Some additional action needs to be taken by the court.
Under Review	EFO, EFS	A clerk reviewer has selected a filing from a queue. **Note: Once a filing reaches the Under Review status, it cannot return to the Submitted status. Selecting the End Review retains the Under Review status and returns the filing to the queue.**
Receipted	EFO, EFS	The filing has been acknowledged by the court as received, but it is not being transmitted to the case management system to become part of the court record. The filing may or may not be part of the proposed order work flow.
Accepted	EFO, EFS	The reviewer has reviewed the filing and accepted it.
Rejected	EFO, EFS	The reviewer has reviewed the filing and rejected it.
Returned	EFO, EFS	The reviewer has reviewed and returned the filing as additional action must be taken by the filer. **Note: The filer can cancel or copy a filing in the Returned status.**
Served	SO	Service Only filings are completed.
Service Incomplete (Service Only filings)	SO	One or more servings failed; the service was incomplete. Example: The email or domain was rejected.

Status	Filing Type	Definition
Canceled	EFO, EFS, SO	The filer has canceled the filing. The filer can only cancel draft and submitted filings.
Submission Failed	EFO, EFS	A file format or billing error has occurred when the filer submitted the filing. Failure specifics are available on the *Details* page, and the filer is notified of specifics through email.

CHAPTER 3 HOME PAGE

TOPICS COVERED IN THIS CHAPTER

♦ REGISTERING AS A FIRM USER
♦ RESETTING YOUR PASSWORD

The home page serves as the gateway to the system. From this page, you can register, sign in, view training sessions, and get contact information for Technical Support.

Note: To join a firm, request an invitation from your Firm Administrator.

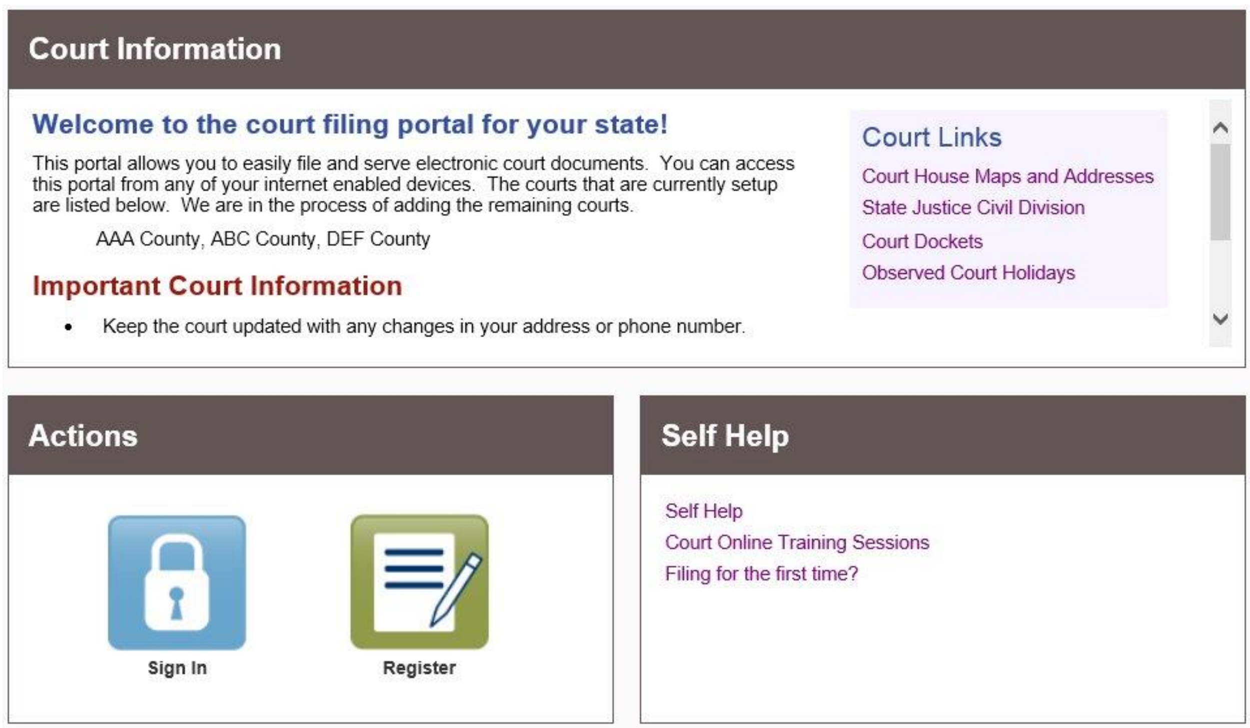


Figure 3.1 – File & Serve Home Page

Court Information

The **Court Information** panel provides links to the courts in your area. Click those links to access detailed information about the courts, including their location and general information about each court.

Actions

The **Actions** panel is where you sign in to the system or register as a user.

The **Sign In** area is where you sign in to and use the File & Serve system. Type your email address and password to sign in to File & Serve.

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

Self Help

The **Self Help** panel contains links to online training sessions, answers to questions regarding e-filing, and user documentation.

The following types of documents are available to help you answer many of your day-to-day operation questions:

- The *Individual Filer User Guide* provides step-by-step instructions on using the system. The user guide covers activities such as signing into the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and passwords.
- The *Firm Administrator Guide* is specifically for the Firm Administrator. This guide covers administrative functions such as registering the firm, managing firm users, payments, and attorney accounts, as well as creating and editing the firm's service contact lists.
- The *Firm User Guide* is specifically for the firm users who are not Firm Administrators. This guide covers activities such as signing into the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and passwords.
- The *Quick Reference Guide* (QRG) provides only the steps needed to complete common tasks such as registering for an account, initiating a new case, and filing into an existing case.

Registering as a Firm User

You can create an account with a firm and register as a firm user after being invited to join the firm.

Note: If you would like to have an account with the File & Serve system, please contact your Firm Administrator. Your Firm Administrator can invite you to join the firm through email. Follow the link provided in the email, and you can join the firm in the File & Serve system.

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

1. Click the link in the invitation email to join a firm.

You have been invited to join firm GF Law. Please use this link to begin electronic filing with Odyssey File and Serve.
https://PLADVSVOFSANO1//OfsWeb/UserModule/Registration?firm=75de1a69-033e-43f4-9b9a-35c0388f2b79

Figure 3.2 – Example of Firm User Invitation Email

Note: If you do not have an invitation email, request one from your Firm Administrator.

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

After you click the link, the *Register* page is displayed.

2. Complete the required fields outlined in red font: **First Name**, **Last Name**, **Email Address**, **Password**, **Security Question**, and **Security Answer**.

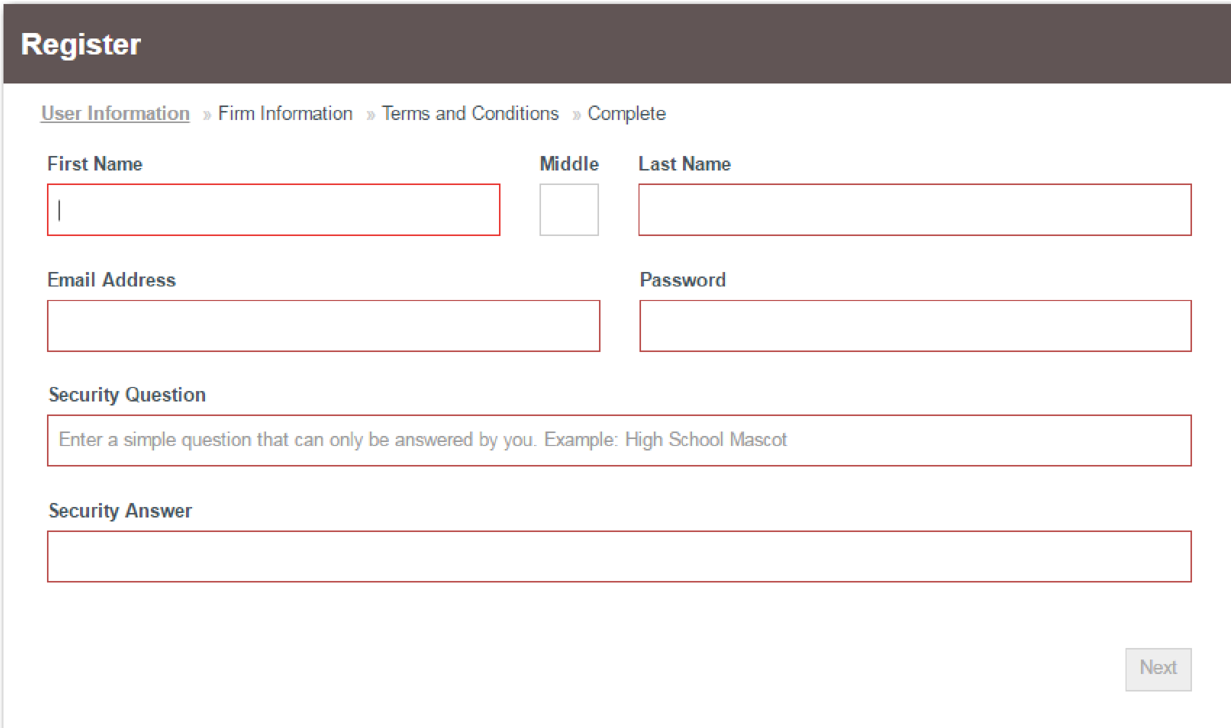


Figure 3.3 – Register Page for Firm User

3. Click 

.

   The next page is displayed, showing the firm you were invited to join.

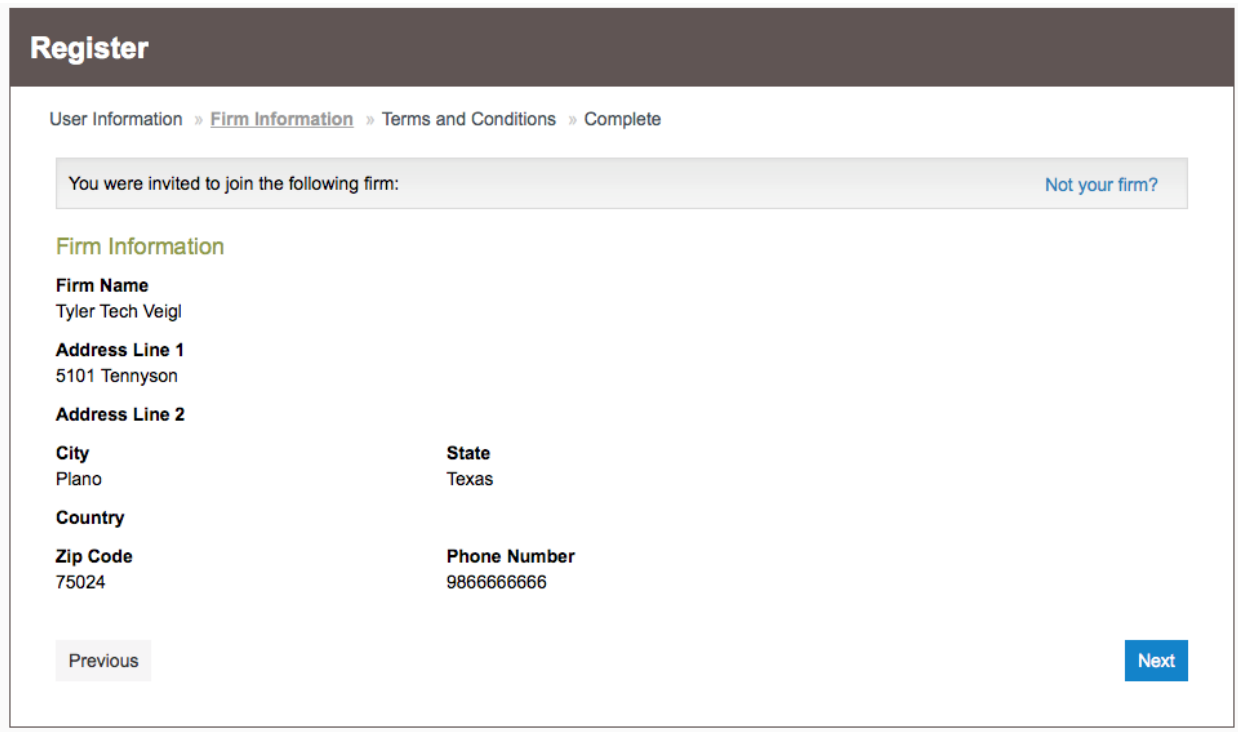


Figure 3.4 – Register Page with Firm Information

4. Click Next to continue with your registration, or click Previous to return to the previous page.
5. If you choose to continue with your registration, the *Register* page is displayed. Read the agreement before proceeding.

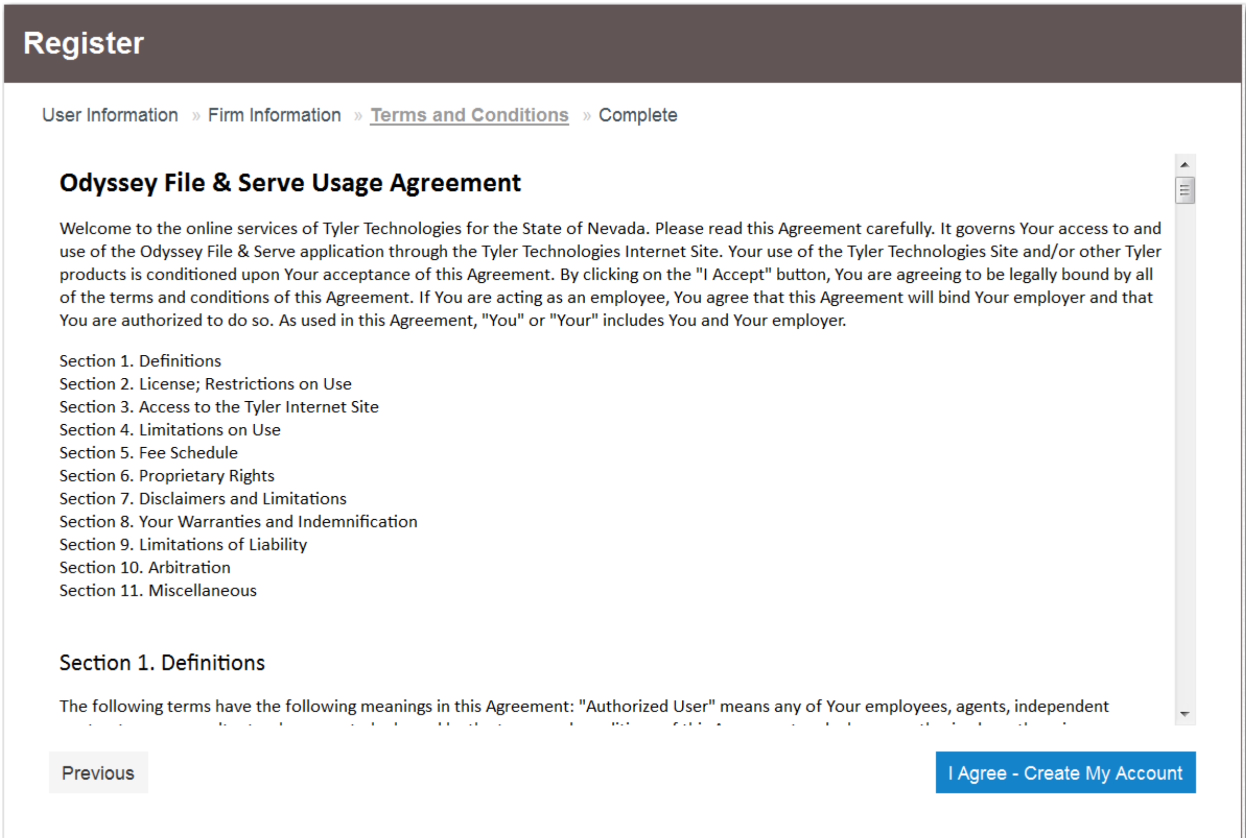


Figure 3.5 – Register Page with Usage Agreement

6. Select I Agree - Create My Account to accept and agree to the terms listed on your page. If you do not want to continue with your registration, click Previous to return to the previous page.
7. If you continue with your registration, a confirmation page is displayed, and a verification email is sent to the email address you provided.

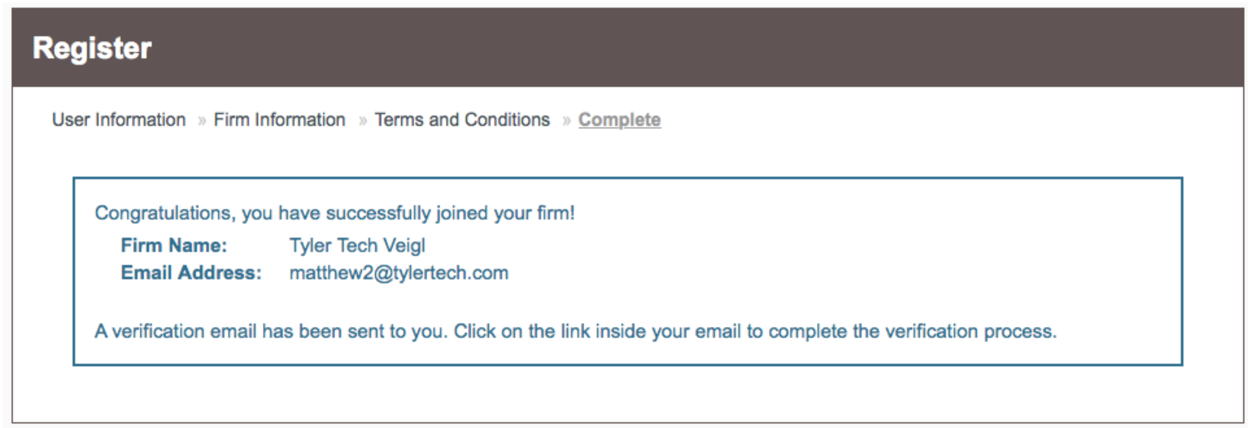


Figure 3.6 – Register Page with Confirmation

Note: You must verify your email address to complete the registration process. A verification email (from File & Serve) 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.

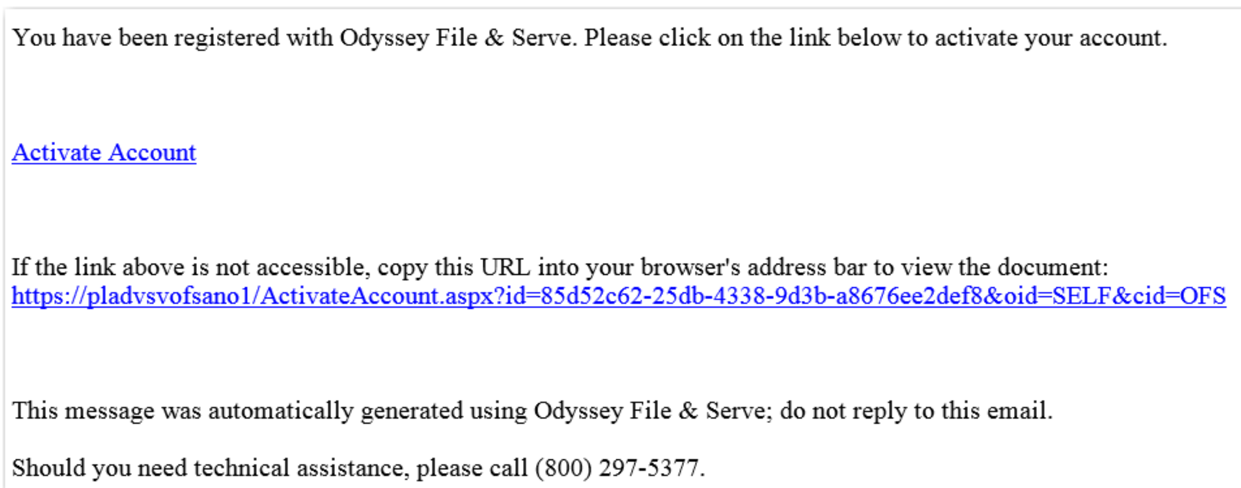


Figure 3.7 – Verification Email

Your registration is complete. Navigate to the home page to log on.

Resetting Your Password

To reset your password, perform the following steps:

1. On the File & Serve home page, click 
.
2. Type your email address in the **User ID** field.

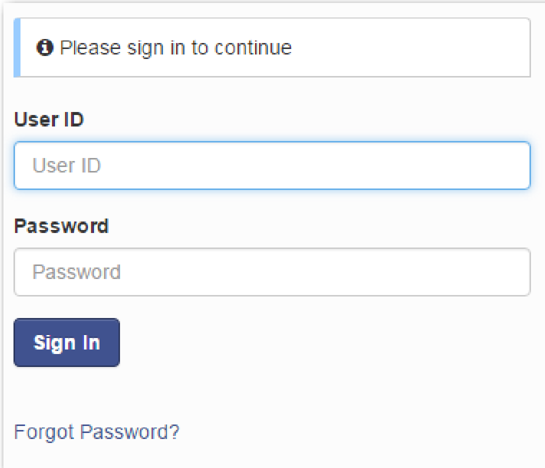


Figure 3.8 – Sign In Page

3. Click Forgot Password? .

   A page is displayed with a message requesting that you type your email address.

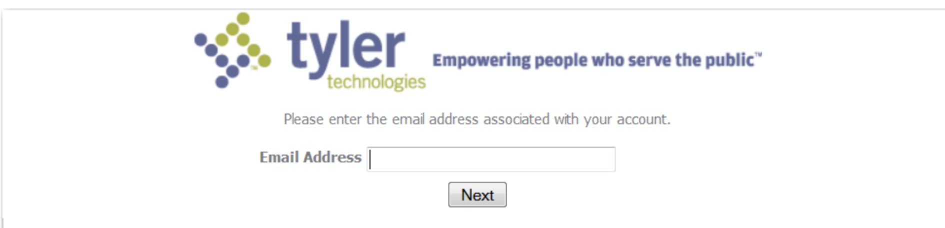


Figure 3.9 – Change Password Page

4. Type the email address that you provided during the registration process in the **Email Address** field.
5. Click Next .
6. On the next screen, you are asked to confirm that you are a human and not a machine. Select the **I'm not a robot** check box.

   Note: The size of the screen that is displayed may vary, depending on where you are in the system when you request a password reset.

Figure 3.10 – Password Reset Page – Check Box Cleared

Note: A screen might be displayed from which you must select specified images. If so, continue with the next step. If not, continue with Step 8.

7. Click the requested images, and then click **Verify**.

   If you selected the proper images during the verification process, the first screen is displayed again, and the **I'm not a robot** check box is now selected.

   Note: The size of the screen that is displayed may vary, depending on where you are in the system when you request a password reset.

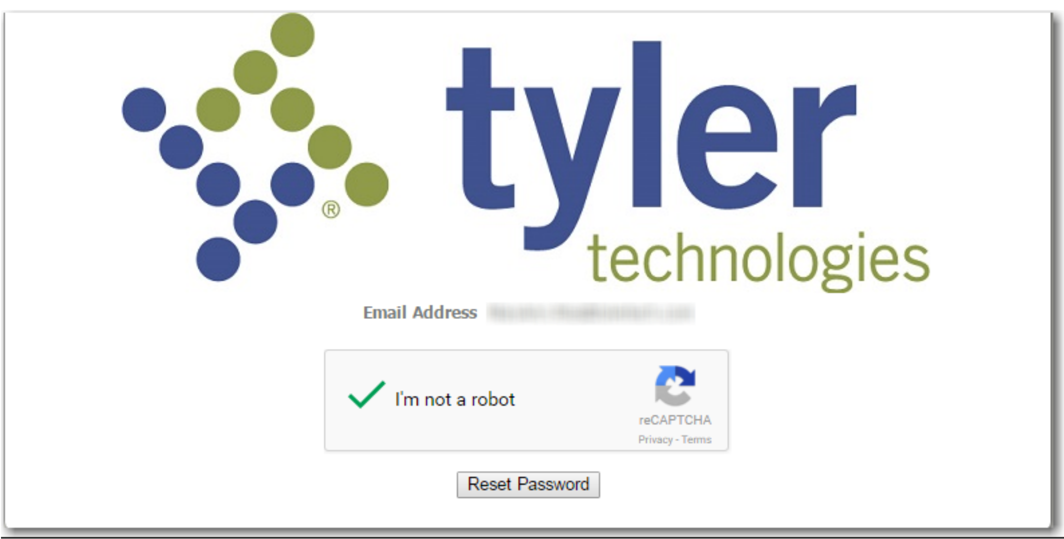


Figure 3.11 – Password Reset Page – Check Box Selected

8. Click **Reset Password**.

   When you have successfully selected the correct images (if you were asked to do so), the system displays this message: `A password reset link has been sent to the email address` `associated with your account. If you do not see the password reset email in your Inbox, please check to see if it was delivered to your spam folder.`

9. Check your email inbox.
10. Locate the email from File & Serve.
11. Click the link that is labeled click **here** to reset your password.

    You are prompted to create a new password.
12. Type a new password in the **New Password** field.
13. Retype your new password in the **Repeat New Password** field.
14. Click **Change Password**.

    A confirmation page displays the following message: `Your password has been changed successfully.`

Chapter 4 Sign In and Sign Out

Topics Covered in This Chapter

All users are required to sign in 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 sign out after they have completed their transactions.

Signing In

Sign in by using the email address and password that you provided during the registration process. You must sign in to be able to e-file or e-serve documents.

**Note: Click 

to register if you have not registered before.**

Perform the following steps to sign in:

1. Navigate to the home page.
2. Click 

.
3. Type your email address and password (which is case sensitive) in the fields provided.

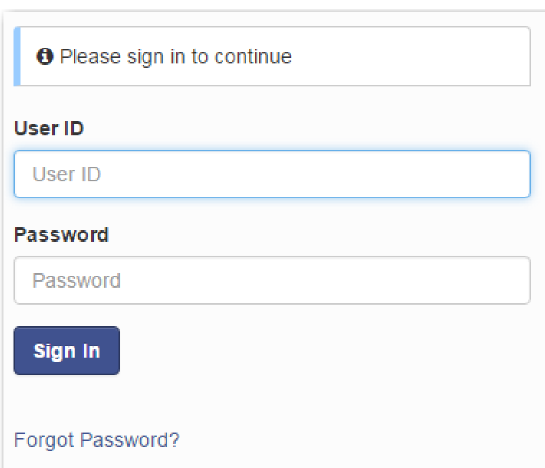


Figure 4.1 – Sign In Page

Note: After you make several failed attempts to sign in to the system, your account is locked. You can unlock your account by clicking Forgot Password?.

Once you have successfully signed in, you can begin to e-file and e-serve documents.

Signing Out

This section describes how to sign out of File & Serve.

Perform the following steps to sign out:

1. From the profile drop-down list on the page, click **Sign Out**.

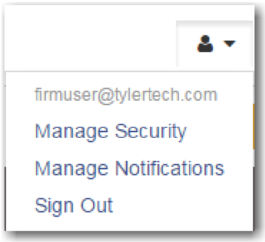


Figure 4.2 – Sign Out Option on Profile Drop-Down List

The *Sign Out* page is displayed.

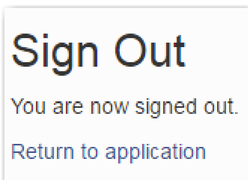


Figure 4.3 – Sign Out Page

2. Return to the home page to sign in to the system.

CHAPTER 5 PROFILE PREFERENCES

TOPICS COVERED IN THIS CHAPTER

The profile drop-down list provides options for changing your password and managing your notifications.

CHANGING THE USER PASSWORD

Change your password from the *Manage Security* page.

To change the user password, perform the following steps:

1. From the profile drop-down list, select **Manage Security**.

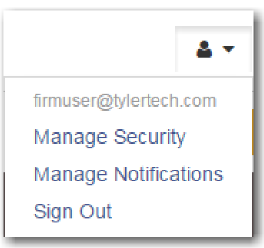


Figure 5.1 – Profile Drop-Down List

The *Manage Security* page is displayed.

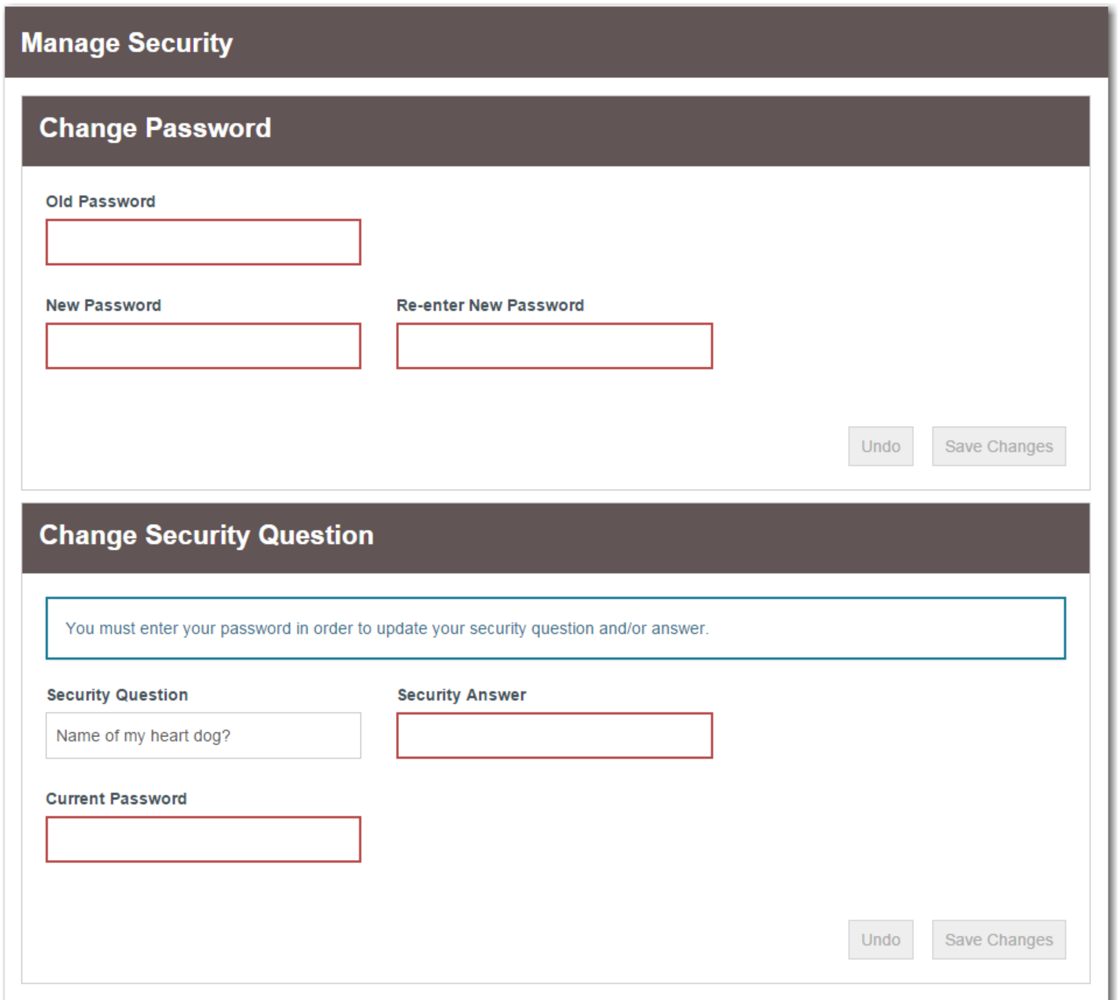


Figure 5.2 – Manage Security Page

2. Type your old password, followed by your new password. Then, retype your new password.

   Note: Your password is case sensitive and must be at least eight characters in length with at least one lowercase letter, one uppercase letter, and one number or symbol.

3. Click Save Changes to change your password, or click Undo to exit without changing your password.

Changing the Security Question

Change your security question from the *Manage Security* page.

Perform the following steps to change your security question:

1. From the profile drop-down list, select **Manage Security**.

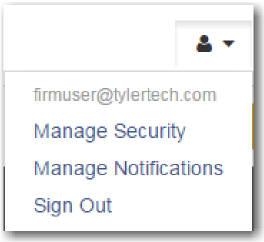


Figure 5.3 – Profile Drop-Down List

The *Manage Security* page is displayed.

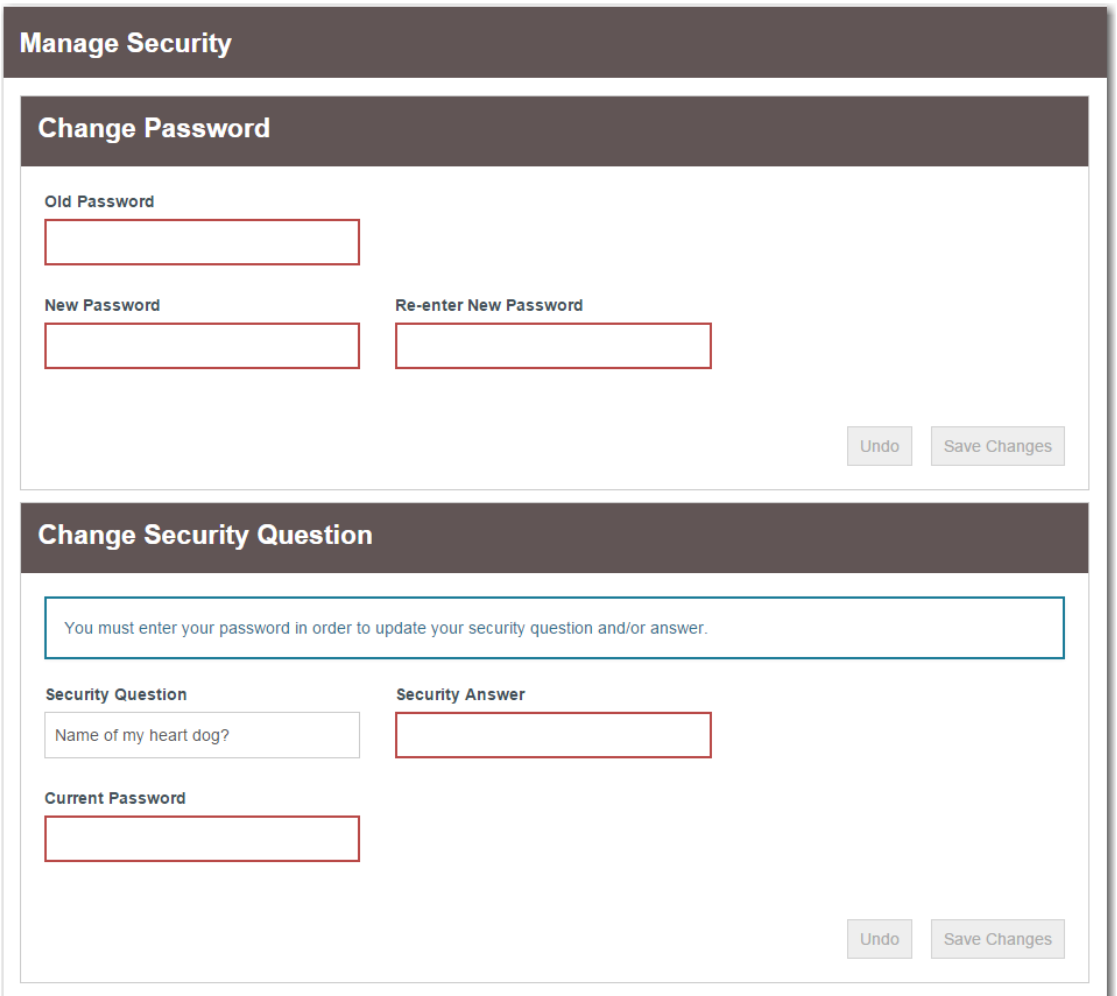


Figure 5.4 – Manage Security Page

2. Change your security question and answer by typing your new information in the **Security Question** and **Security Answer** fields. Then, type your current password in the **Current Password** field.
3. Click Save Changes to change your security information, or click Undo to exit without changing your security information.

Managing Notifications

You can set your notification preferences for receiving filing information.

Perform the following steps to set your email notifications:

1. From the profile drop-down list, select **Manage Notifications**.

   The *Manage Notifications* page is displayed.

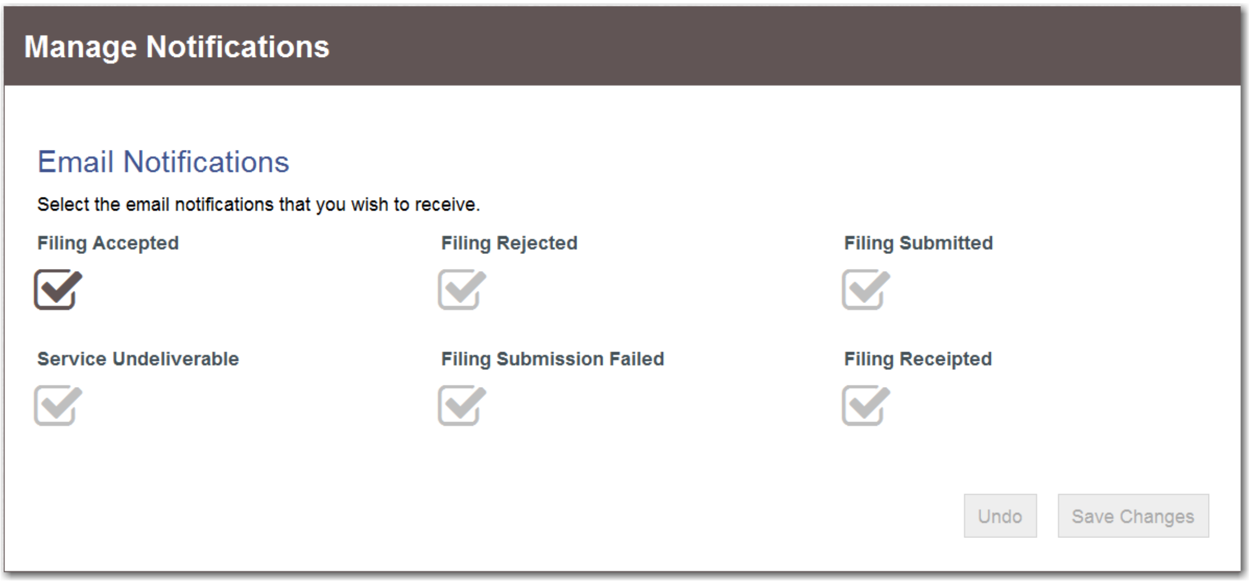


Figure 5.5 – Manage Notifications Page

2. Select the check boxes that correspond to the methods by which you want to be notified of filing information. The options that you can select include **Filing Accepted**, **Filing Rejected**, **Filing Submitted**, **Service Undeliverable**, **Filing Submission Failed**, and **Filing Receipted**.

3. Click Save Changes to save your notification selection, or click Undo to exit without changing your notification information.

Chapter 6 Filer Dashboard

Topics Covered in This Chapter

♦ Dashboard Filing Category Descriptions

The *Filer Dashboard* page is the starting page for all filings. From here, you can start a new case, file into an existing case, and check the status of all filings that have been made.

The number counter by each status indicates there are filings that have been recently done or added. The number counter resets after a filer checks the activity.

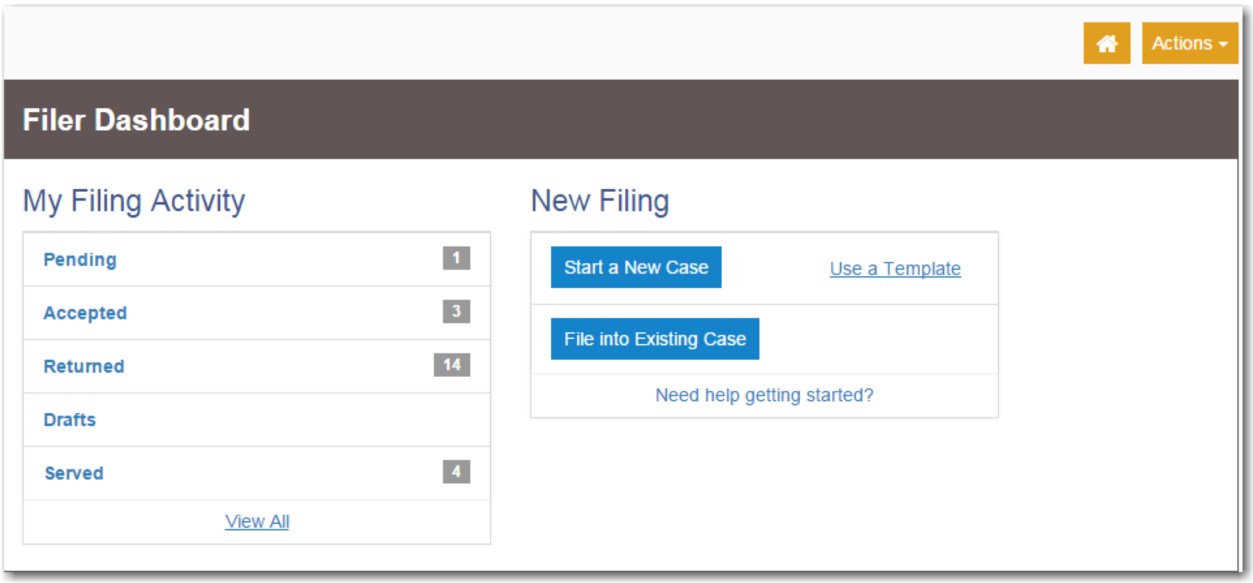


Figure 6.1 – Filer Dashboard Page

The home icon () next to the **Actions** drop-down list can be clicked from any page in the system to return to the *Filer Dashboard* page.

Dashboard Filing Category Descriptions

The status of all filings can be found in the **My Filing Activity** pane on the *Filer Dashboard* page.

The following table lists the status categories and their descriptions.

Filing Category	Description
Pending	Click to view envelopes that have been submitted and are being processed. Envelopes with a **Pending** status remain pending until there is some action from the court.
Accepted	Click to view envelopes that have been accepted by the court and are filed.
Returned	Click to view envelopes that have been returned from the court to be corrected.

Filing Category	Description
Drafts	Click to view envelopes that have not been submitted yet.
Served	Click to view envelopes that have service-only filings that have been delivered. Envelopes with a **Served** status have been delivered to the party.

Chapter 7 Payment Accounts

Topics Covered in This Chapter

Unavailable Payment Accounts

During a filing, if any payment account is unavailable, the system notifies you that you are trying to use an invalid account.

A blue link is displayed after the **Payment Account** field. The link contains the following phrase: `View Unavailable Payment Accounts`.

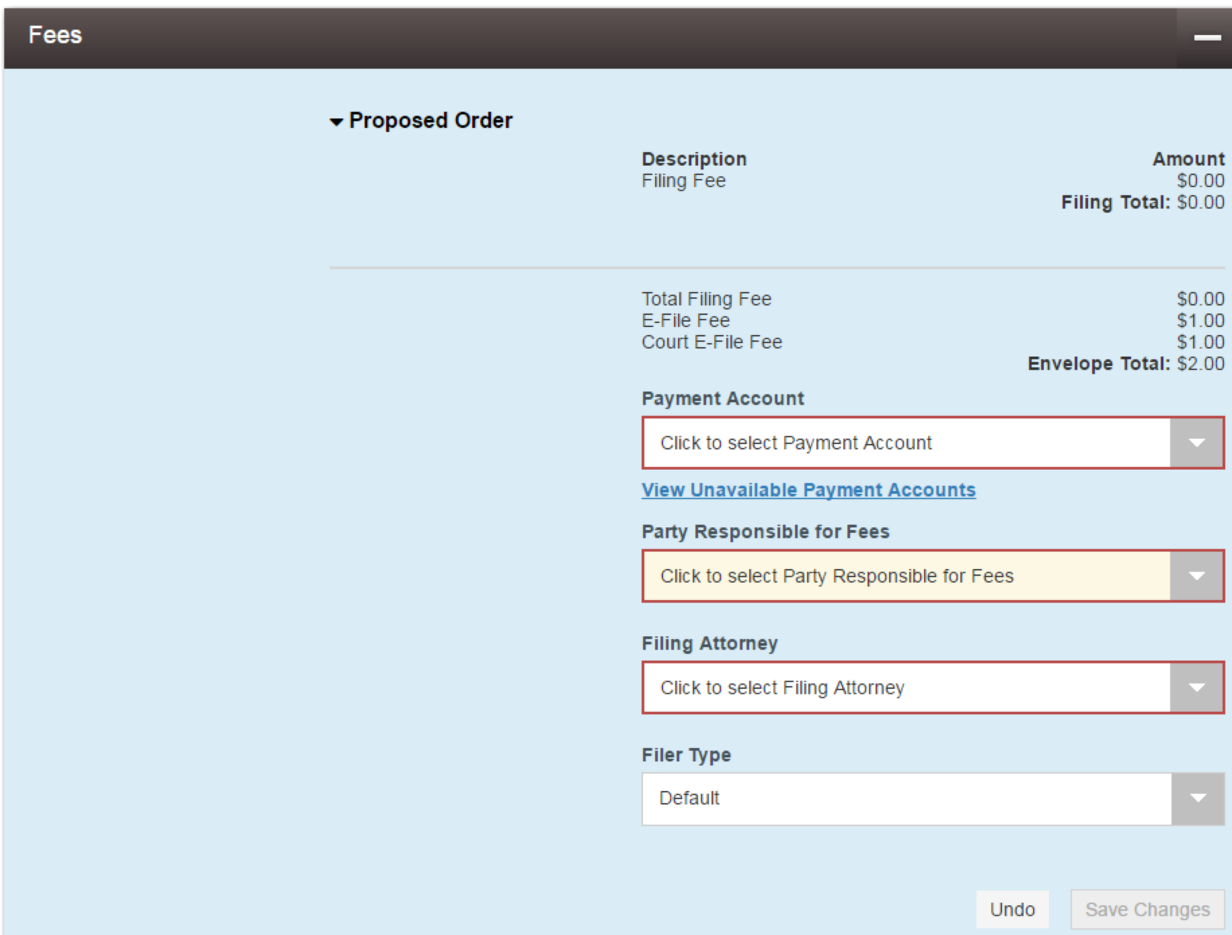


Figure 7.1 – Error Message Regarding Payment Accounts

When you click the link, a window is displayed showing both the unavailable payment account and the reason that the payment account is unavailable.

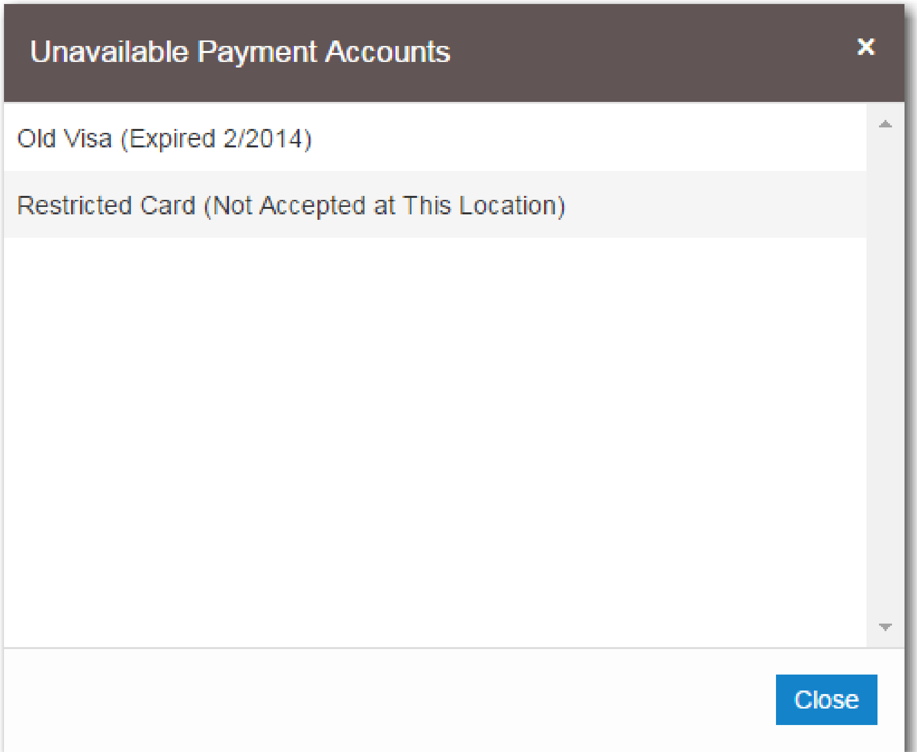


Figure 7.2 – Unavailable Payment Accounts Window

You cannot continue with your filing until you enter the correct information.

Draw Down Account User Interface

The locations of existing draw down accounts can be edited.

Note: Draw down accounts are configured by Tyler and may not be available on your system.

A tree view of the draw down accounts shows the parent-child relationship of the courts, which means that you can easily see and select the courts that you want to file into.

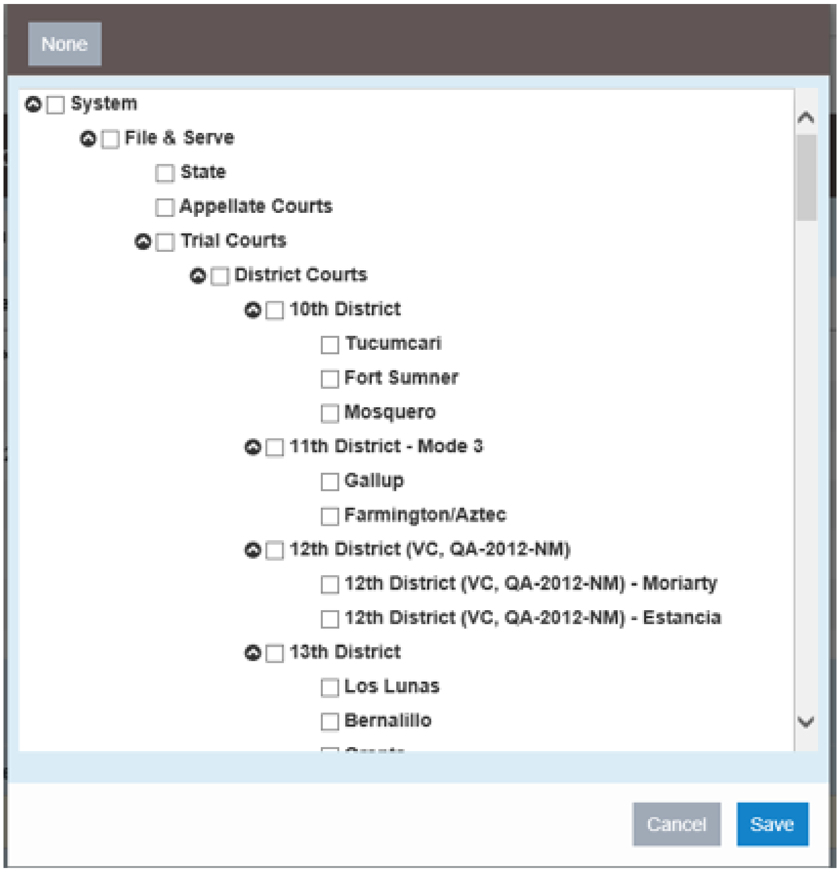


Figure 7.3 – Draw Down Account with Parent-Child Relationship of Courts

Chapter 8 Templates

Topics Covered in This Chapter

- ♦ Creating a Template
- ♦ Editing a Template
- ♦ Using a New Case Template
- ♦ Using an Existing Case Template
- ♦ Viewing Template Details
- ♦ Deleting a Template

Creating a Template

Envelope templates allow you to quickly file into a case or create a new case from a template that you have created, which saves you time.

To create a new template, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Templates**.

   The *Templates* page is displayed.

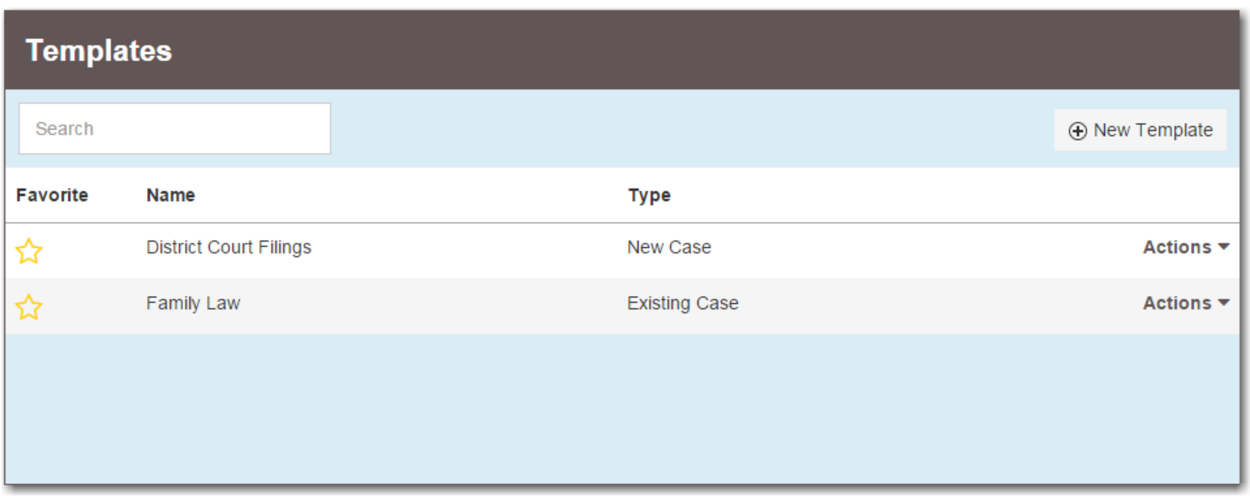
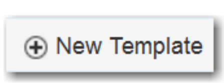


Figure 8.1 – Templates Page

2. Click 

.

   The *New Template* page is displayed.

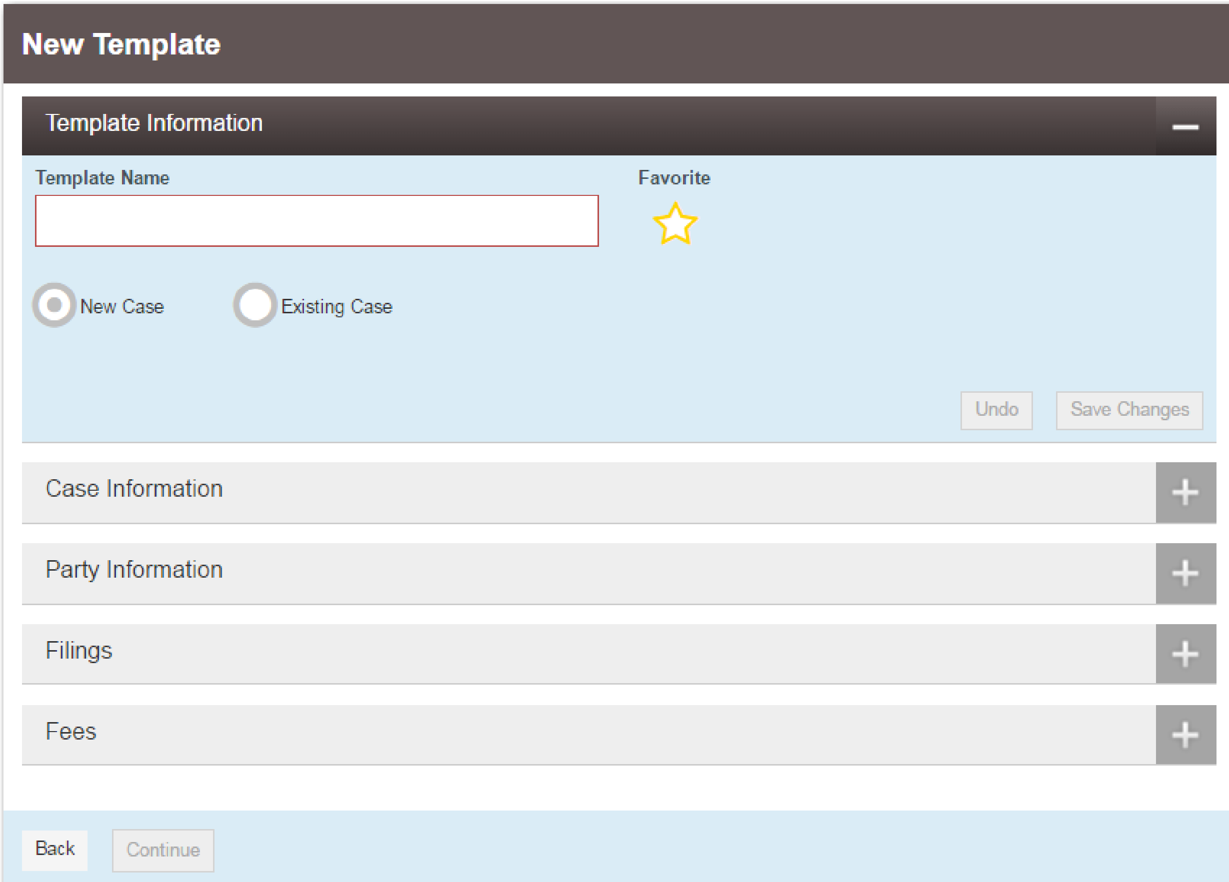


Figure 8.2 – New Template Page

3. To create a new template, type a name for the template in the **Template Name** field. Then, select one of the following options:

   - Click the **New Case** option when creating a template for a new case.

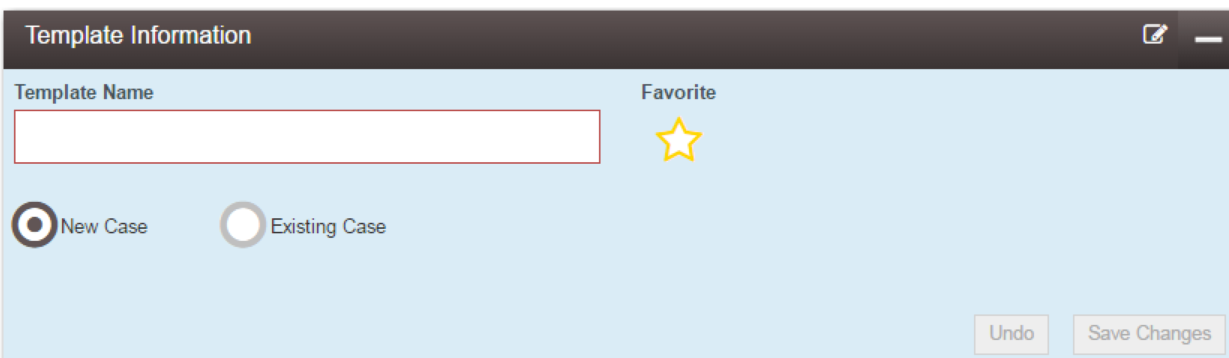


Figure 8.3 – Template Information Section with New Case Option Selected

   - Click the **Existing Case** option when creating a template for an existing case (i.e. subsequent filing).

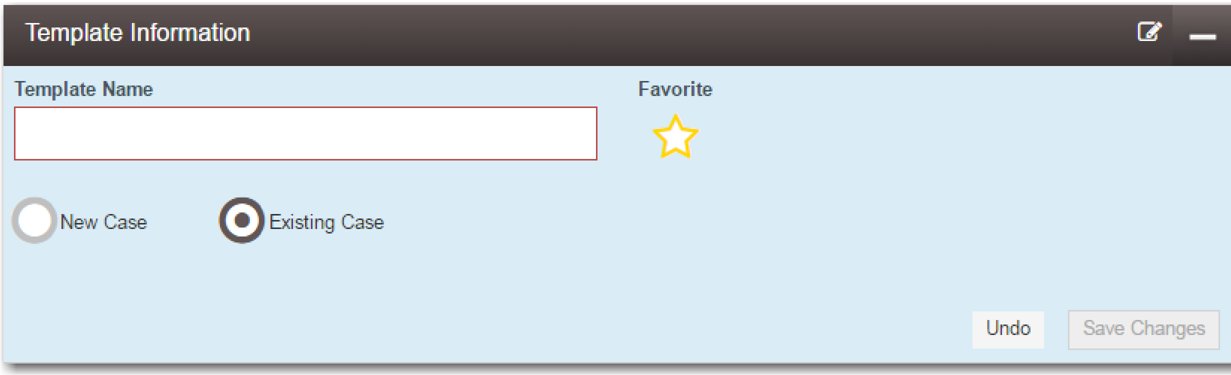


Figure 8.4 – Template Information Section with Existing Case Option Selected

4. Click Save Changes to save your changes, or click Undo to cancel the action.

   Note: Only the template name is required. You can enter as little or as much information on a template as you want.

5. Complete the fields in the **Case Information** section:

   a. Select your court location from the **Location** drop-down list.

      Note: The court location is generally the county or district court where you will be doing the filing.

   b. Select the specific court from the **Refine Location** drop-down list.

      Note: The location filtering feature is configured by Tyler and may not be available on your system.

      Note: The items in this list are limited to only the courts in the county or district that you previously selected.

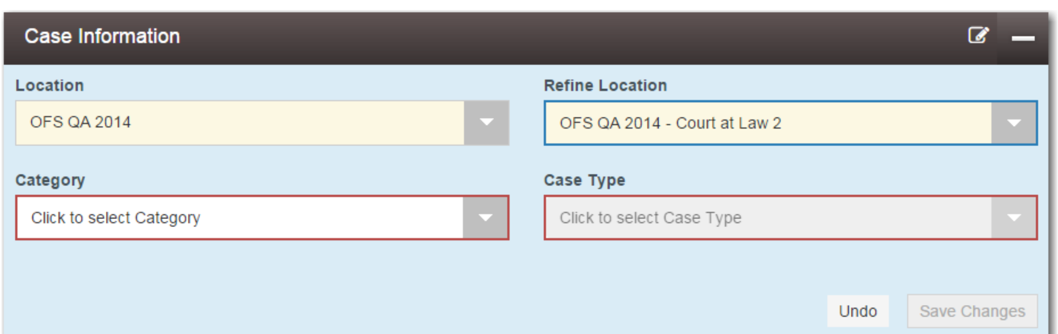


Figure 8.5 – Refine Location Drop-Down List in the Case Information Section

   c. Select the category from the **Category** drop-down list.

      Note: The items in this list are determined by the location you selected.

   d. Select the case type from the **Case Type** drop-down list.

      Note: The items in this list are determined by the category you selected.

      The fee associated with the case type is displayed.

6. Click Save Changes to save your changes, or click Undo to cancel the action.
7. Complete the fields in the **Party Information** section.

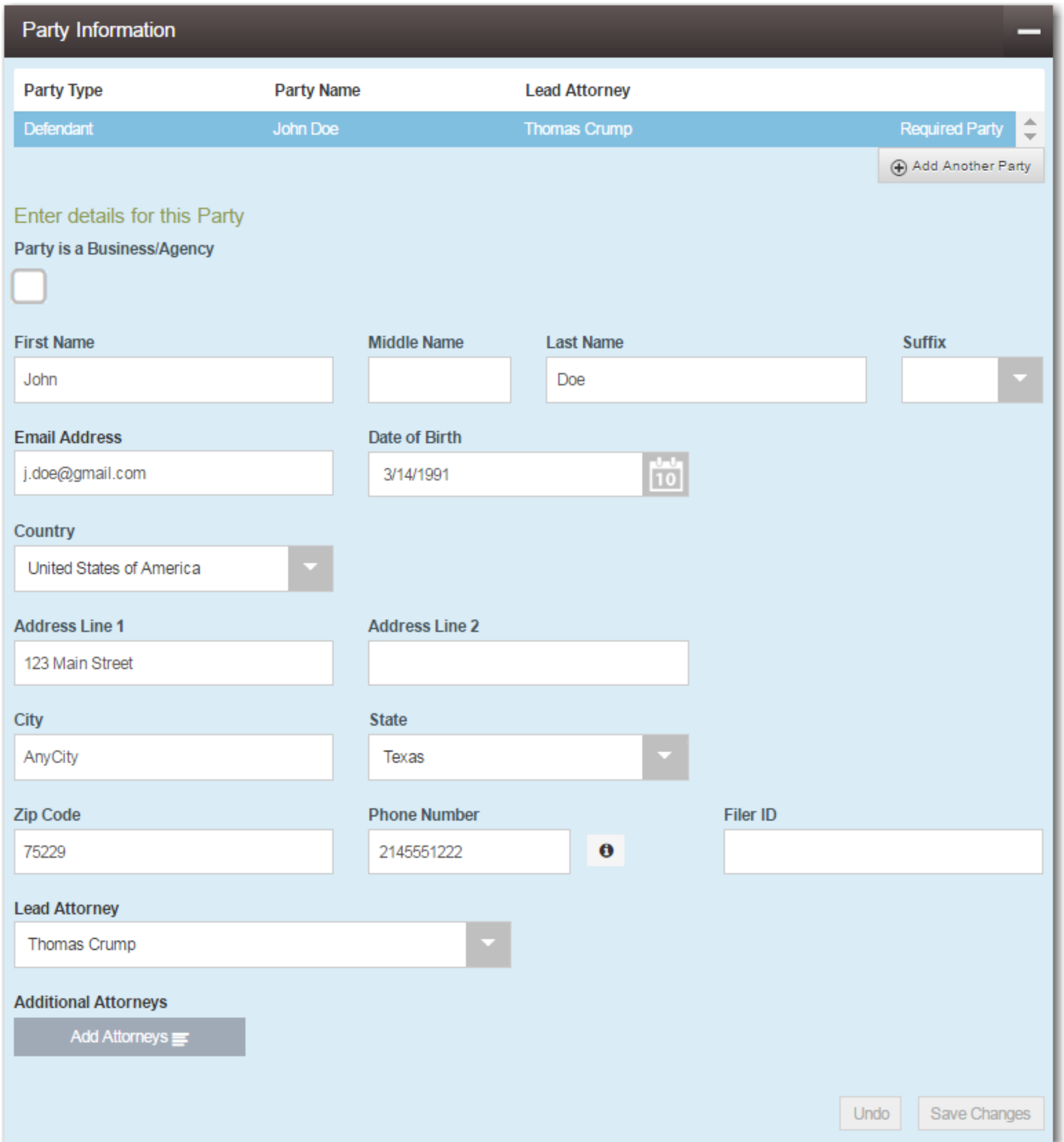


Figure 8.6 – Party Information Section

8. Complete the information in the **Filings** section.

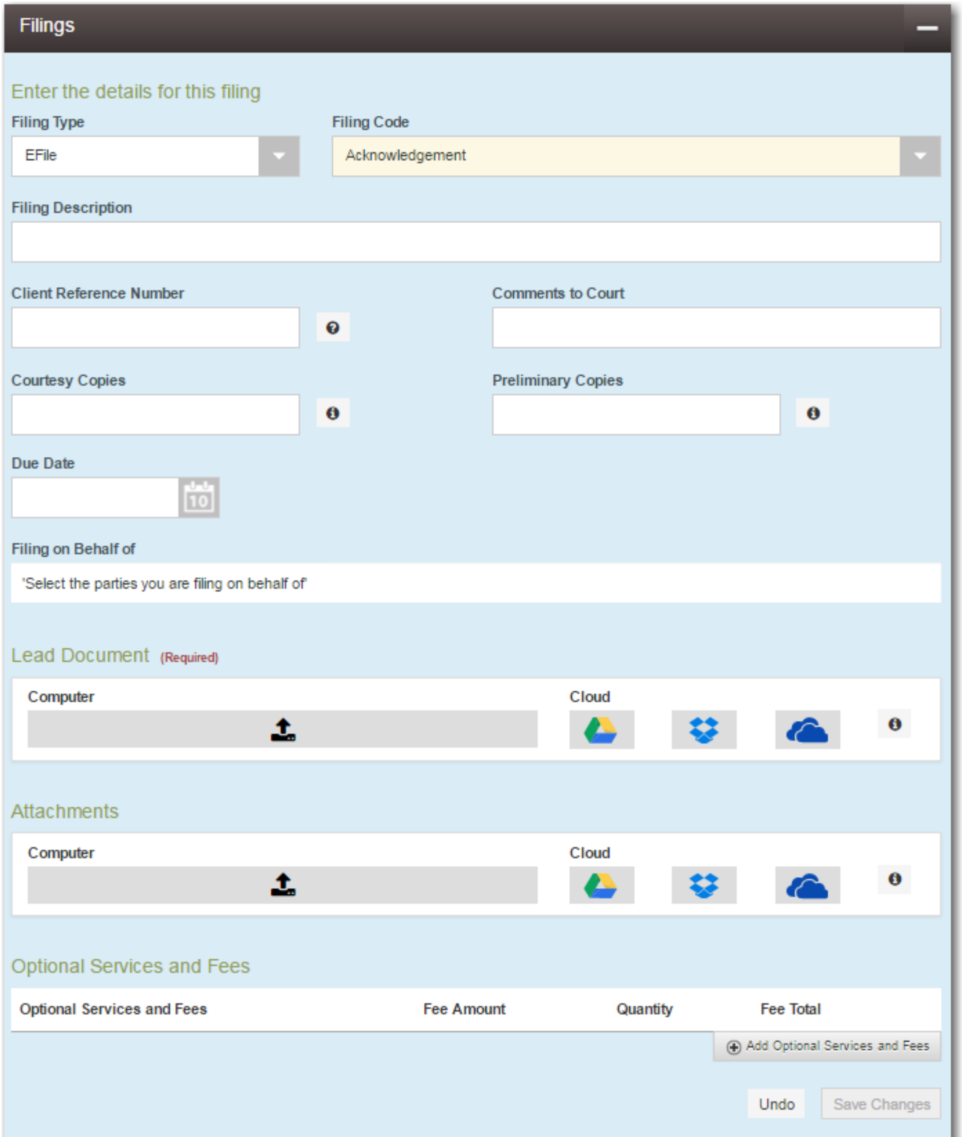


Figure 8.7 – Filings Section

a. Select a filing type from the **Filing Type** drop-down list.
b. Select a filing code from the **Filing Code** drop-down list.

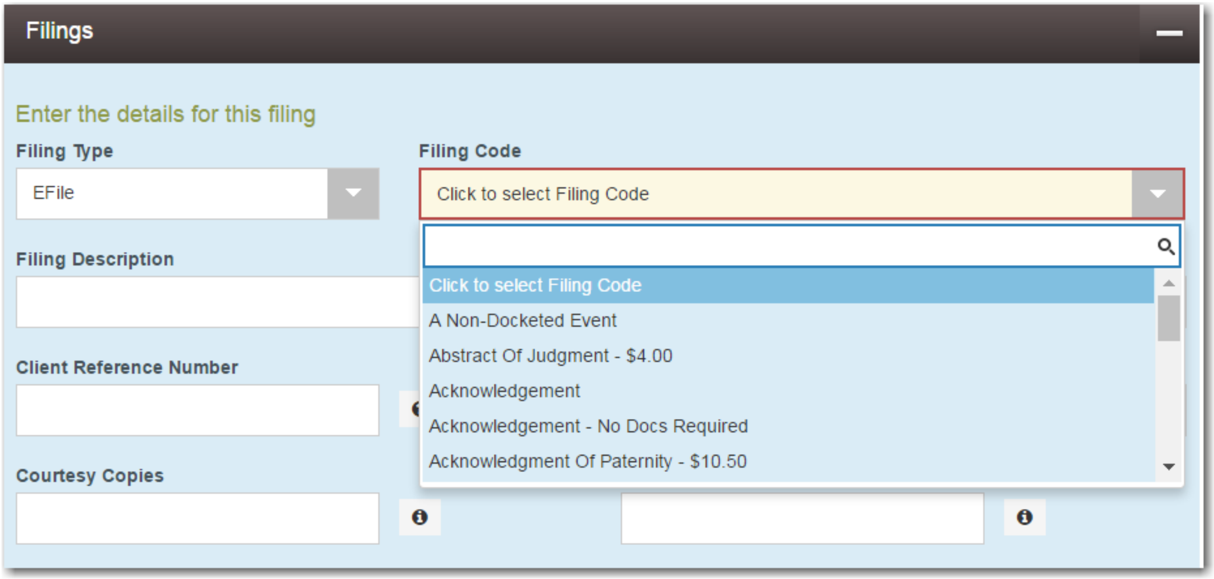


Figure 8.8 – Filing Code Drop-Down List

After you select the filing code, the fee associated with the filing code is displayed.

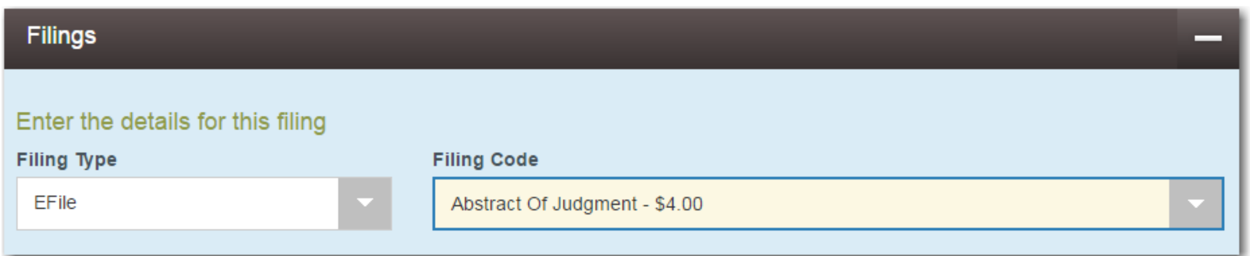


Figure 8.9 – Filing Code Field with Fee Displayed

c. Type a description of the filing in the **Filing Description** field.

d. Type a client reference number in the **Client Reference Number** field.

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

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

Note: The Due Date field is configured by Tyler and may not be available on your system.

A calendar is displayed from which you can select the specified date.

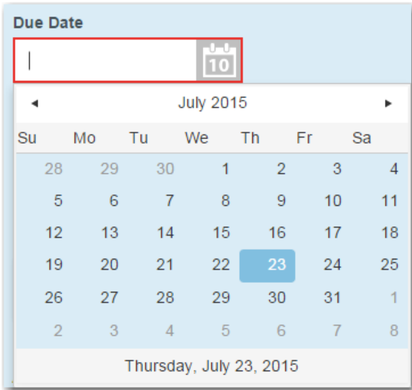


Figure 8.10 – Due Date Calendar

h. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

Note: The filing on behalf of feature is configured by Tyler and may not be available on your system.

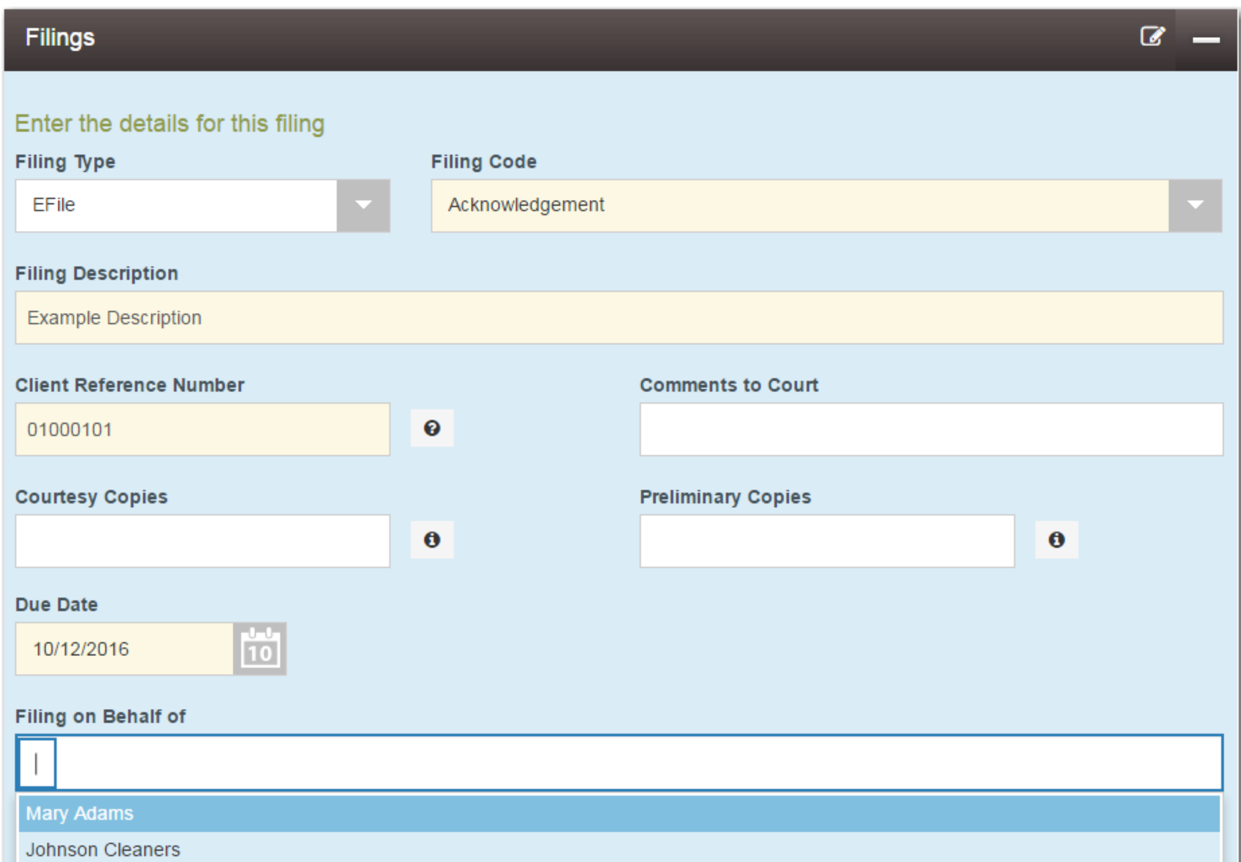


Figure 8.11 – Filing on Behalf of Field in the Filings Section

i. Click the **Lead Document** field to select a lead document to load. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. Only one document can be uploaded as a lead document.

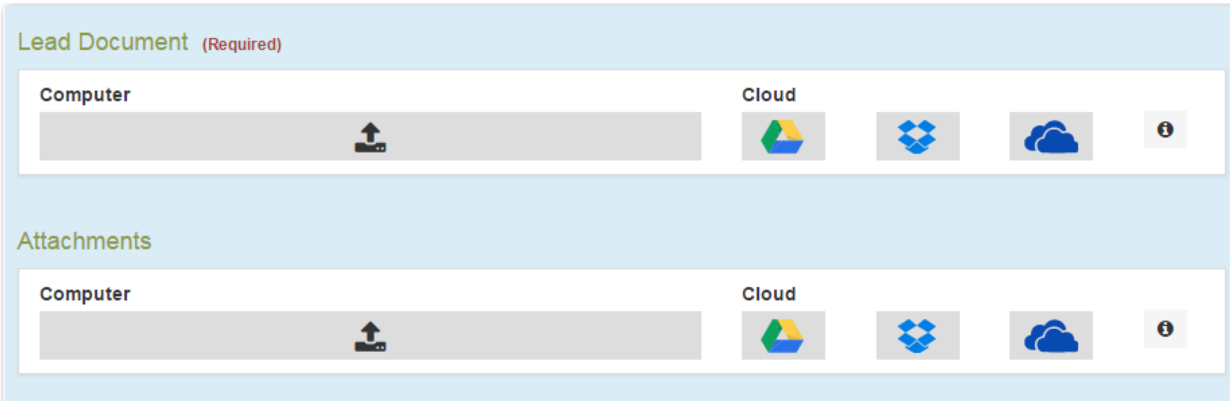


Figure 8.12 – Lead Document and Attachments Fields in the Filings Section

j. Type a name for the lead document in the **Description** field.

Note: A maximum length for the document name can be configured by Tyler at the customer's request. When configured, if a user assigns a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

k. Click the **Security** drop-down list to select the level of security to attach to the document.

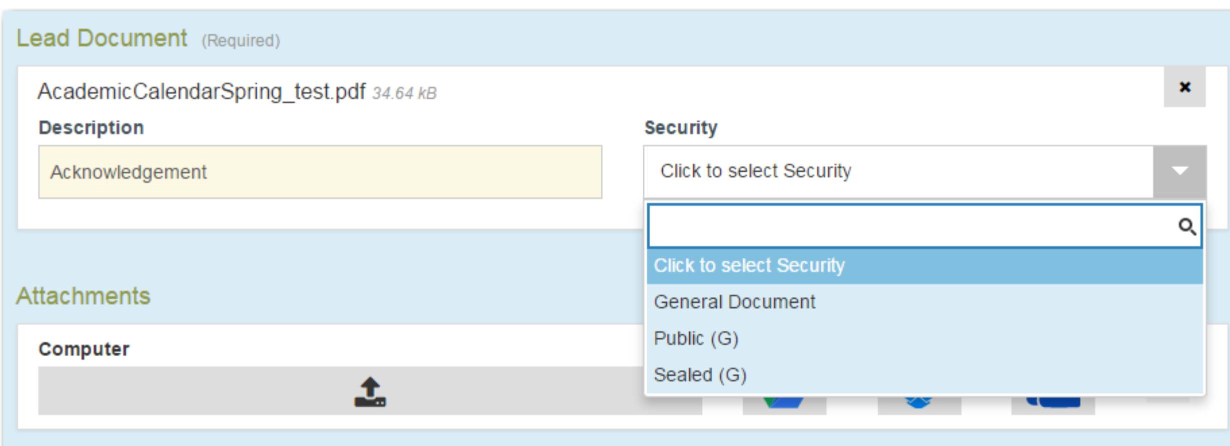


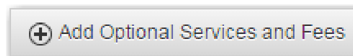
Figure 8.13 – Security Drop-Down List in the Lead Document Section

l. If you have attachments to load, click the **Attachments** field to select the documents to load. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

Figure 8.14 – Optional Services and Fees Section

m. If you want to add an optional service to the filing, click 

.

The **Optional Services and Fees** field is displayed.

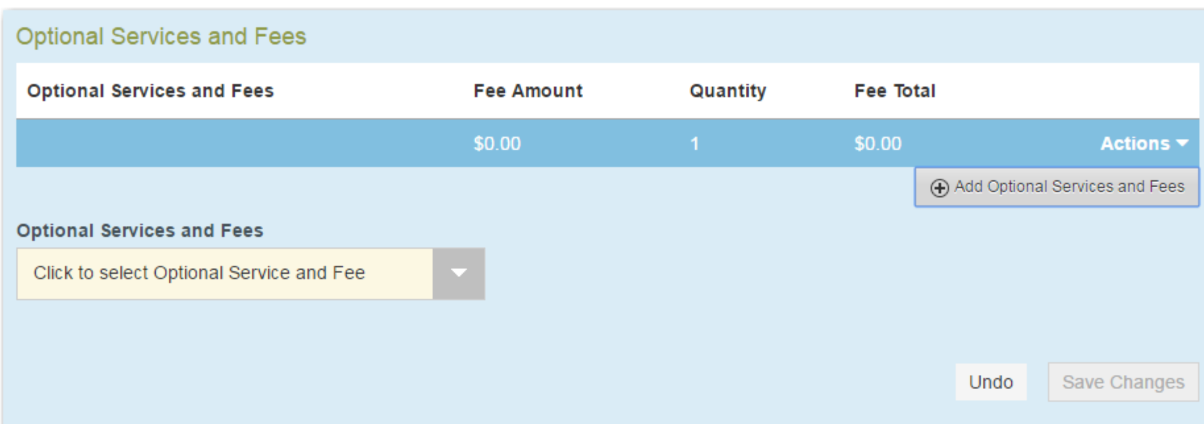


Figure 8.15 – Optional Services and Fees Field in the Optional Services and Fees Section

n. Select a service from the **Optional Services and Fees** drop-down list.

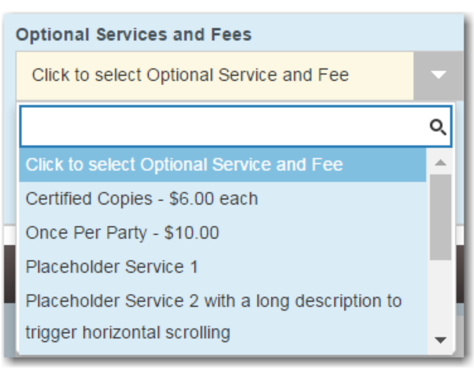


Figure 8.16 – Optional Services and Fees Drop-Down List

The fee associated with the optional service is displayed.

o. When you select the service for certified copies, type the number of copies that you want in the **Enter number of certified copies desired** field.

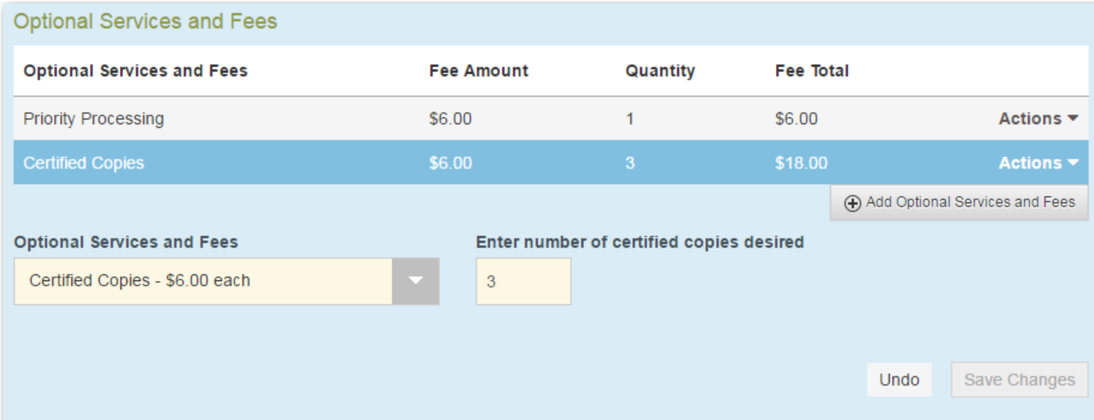


Figure 8.17 – Optional Services and Fees Section with Services Selected

p. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

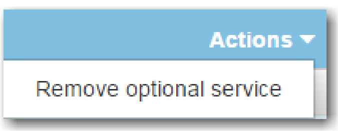


Figure 8.18 – Optional Service Actions Drop-Down List

q. When you are done adding optional services, click 

.

Figure 8.19 – Optional Services and Fees Section with Optional Services Saved

Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

r. Verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

s. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.

9. Complete the fields in the **Fees** section.

Note: Your credit card is authorized when submitted. However, the transaction fees are not posted 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.

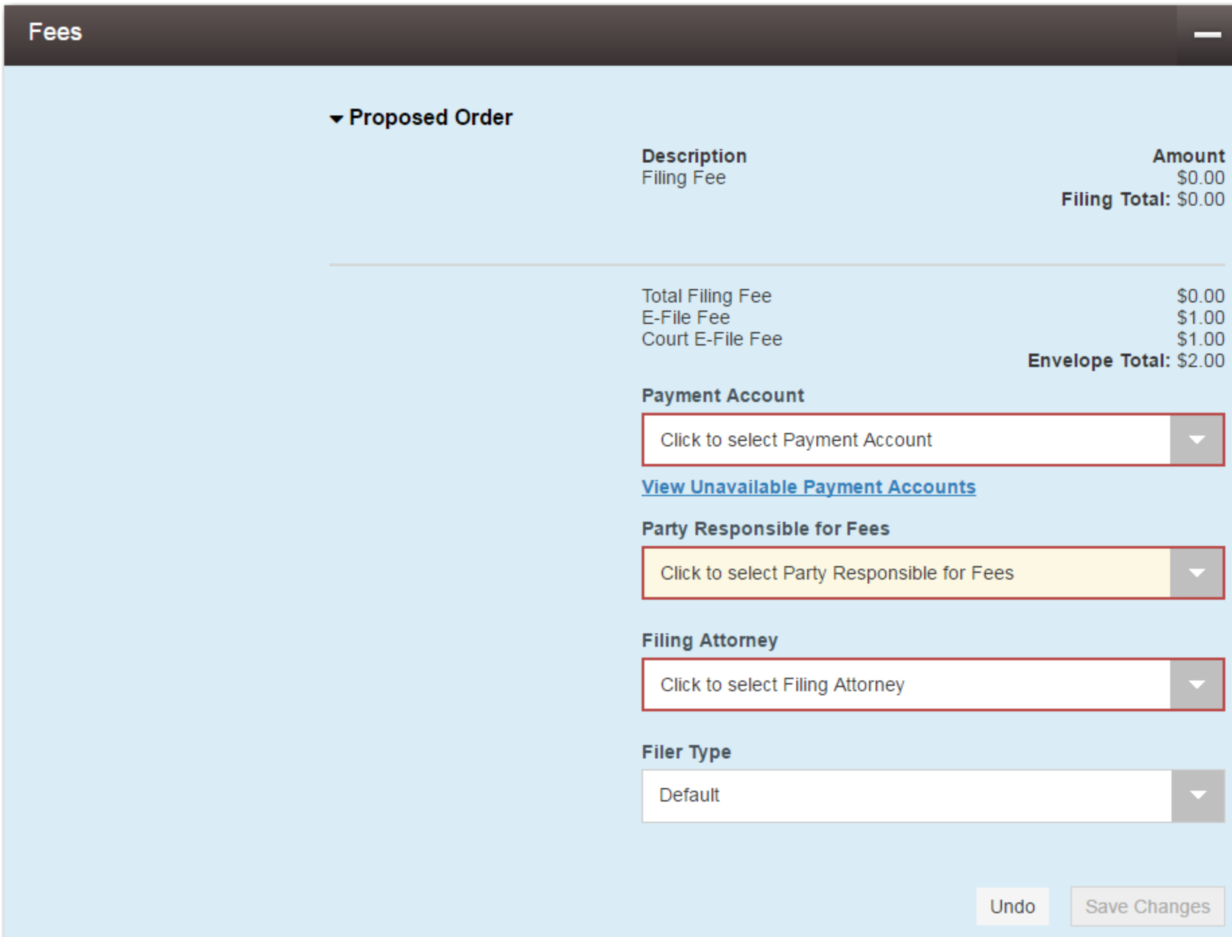


Figure 8.20 – Fees Section

a. Select the payment account from the **Payment Account** drop-down list.

Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

b. Select the party that is responsible for paying the fees in the **Party Responsible for Fees** drop-down list.

c. Select the filing attorney from the **Filing Attorney** drop-down list.

d. Select the filer type from the **Filer Type** drop-down list.

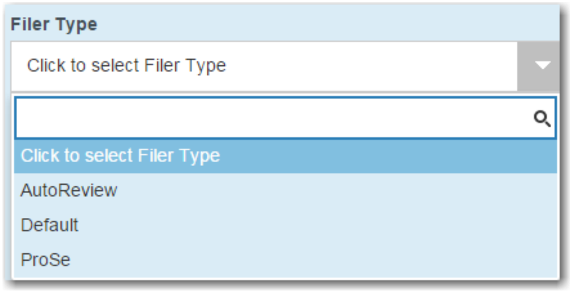


Figure 8.21 – Filer Type Drop-Down List

e. Click Save Changes to save your changes, or click Undo to cancel the action.

10. Click Continue to continue creating the template, or click Cancel to cancel the template creation.

When you click Continue, the *Confirm Template Details* page is displayed.

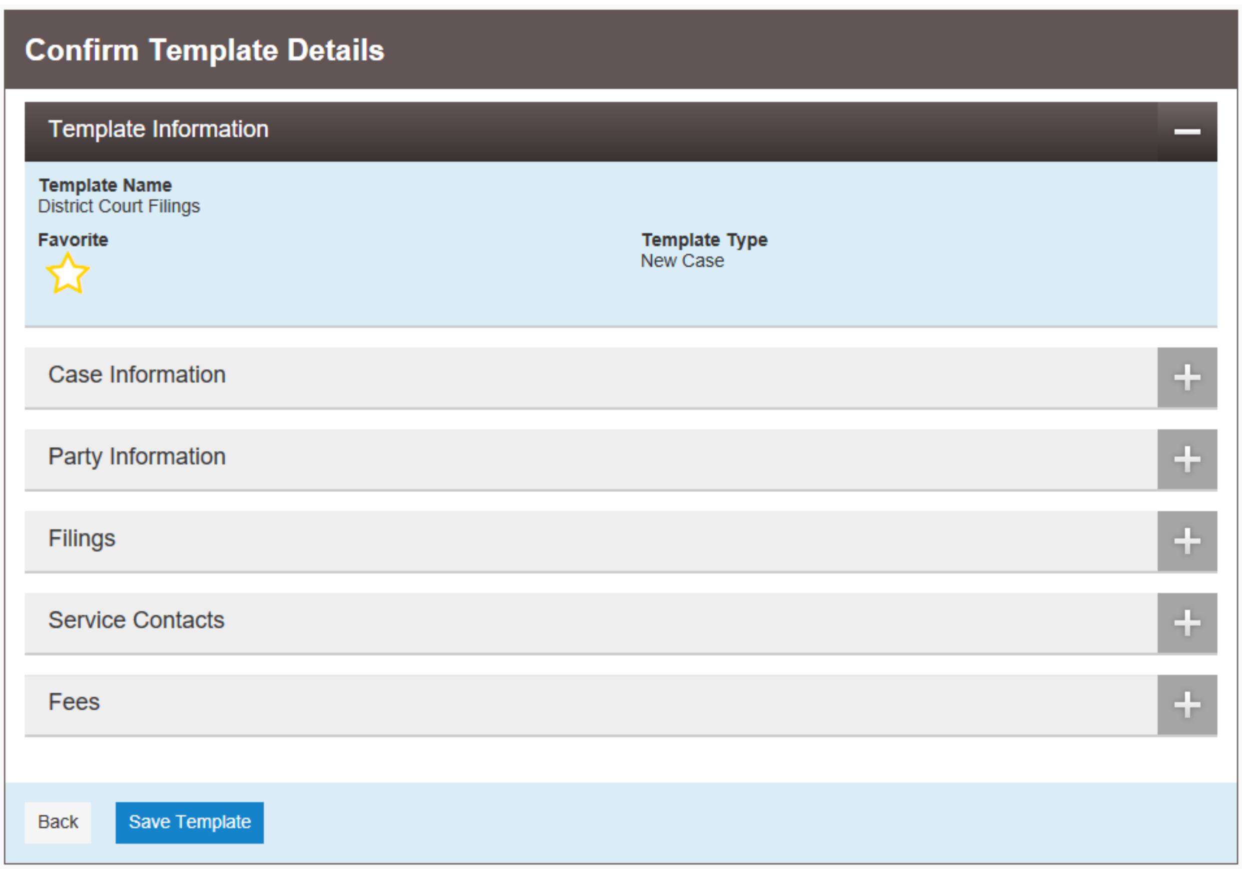


Figure 8.22 – Confirm Template Details Page

11. Review the template details and click Save Template to save the template, or click Back to go back to the previous page.

12. To designate a template as a favorite, click in the **Favorite** column on the *Templates* page.

    The color of the star fills in, indicating this template is a favorite ( ).

    Note: Favorite templates are displayed first on the *Templates* page.

Editing a Template

You can edit an existing template if you need to make changes to it.

To edit a template, perform the following steps:

1. From the **Actions** drop-down list, select **Templates**.

   The *Templates* page is displayed.

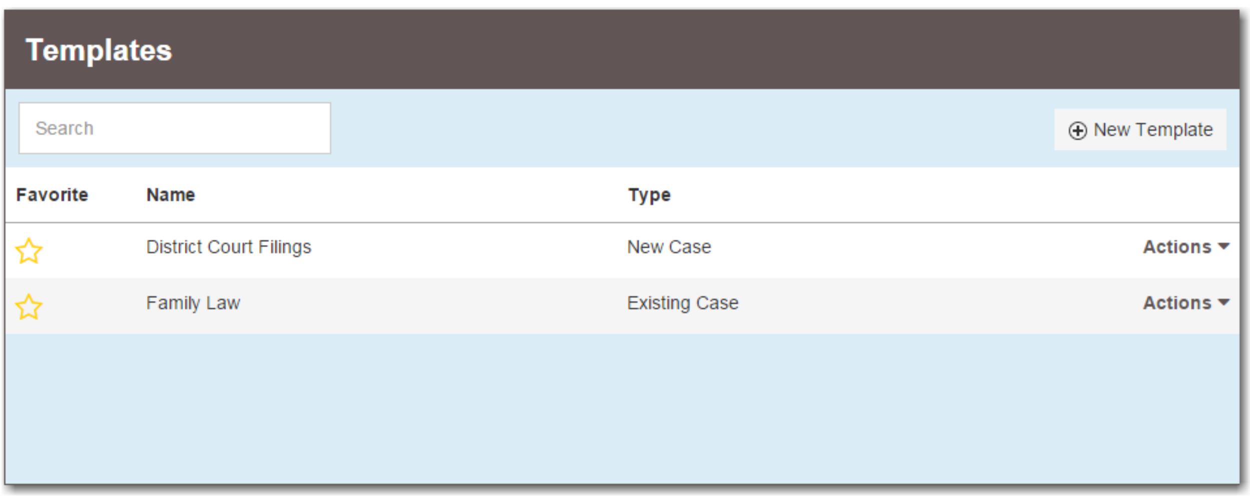


Figure 8.23 – Templates Page

2. Locate the template that you want to change. From the **Actions** drop-down list for the specified template, select **Edit Template**.

   The template is displayed.
3. Make any necessary changes.
4. When you are done modifying the template, click Continue.

   The *Confirm Template Details* page is displayed.
5. If you are satisfied with your changes to the template, click Save Template.

Using a New Case Template

After a template has been created, use it to accelerate your filing.

To use a template that you previously created, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Templates**.

   The *Templates* page is displayed.

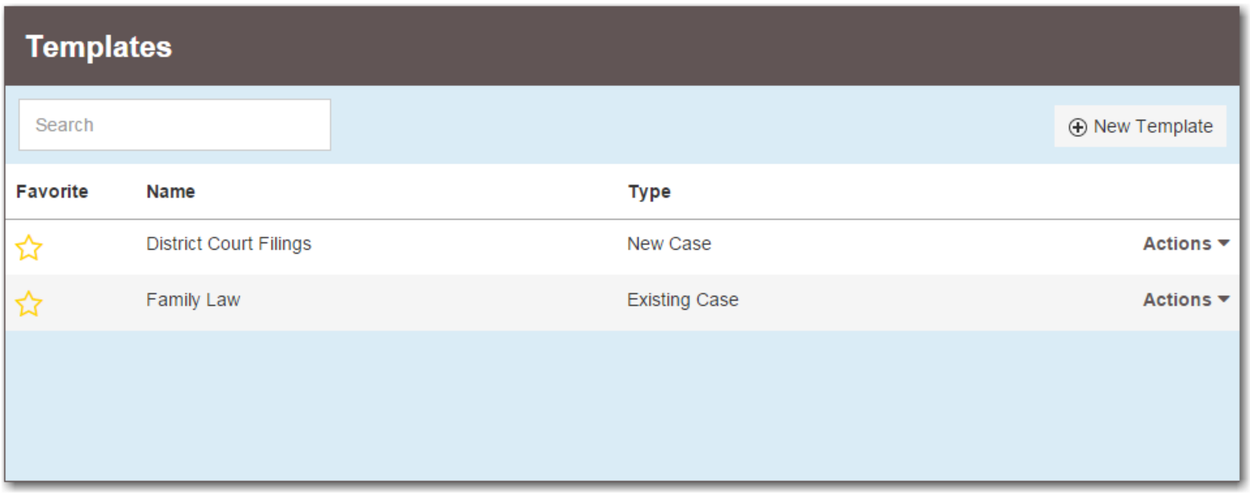


Figure 8.24 – Templates Page

2. Locate the template that you want to use for your case. From the **Actions** drop-down list for the specified template, select **Use Template**.

   The template is displayed. The portions of the template that you created previously are auto-filled.
3. As applicable, complete all remaining fields for the new case (i.e., **Party Information**, **Filings**, including uploading a lead document, and **Fees**).
4. When all fields have been completed, click Save as Draft or Summary.

   If you click Summary, the case is displayed for your review.
5. If you are satisfied with the case, click Submit.

Using an Existing Case Template

After a template has been created, use it to accelerate your filing when filing into an existing case.

To access an existing case template, perform the following steps:

1. On the *Filing History* page, locate the case that you want to file into.
2. From the **Actions** drop-down list for the specified case, select **File Into Case With Template**.

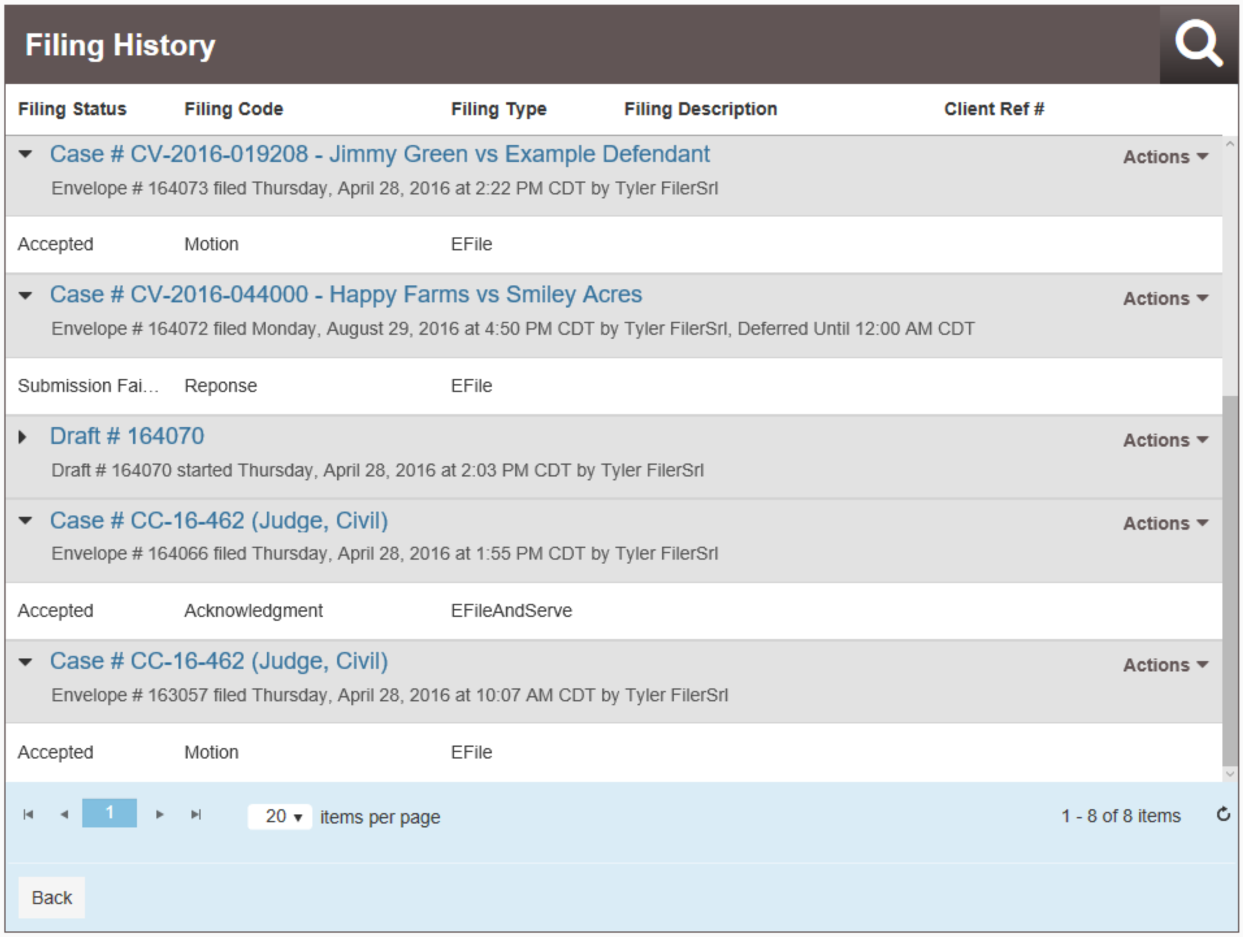


Figure 8.25 – Filing History Page

The *File Into Case With Template* page is displayed.

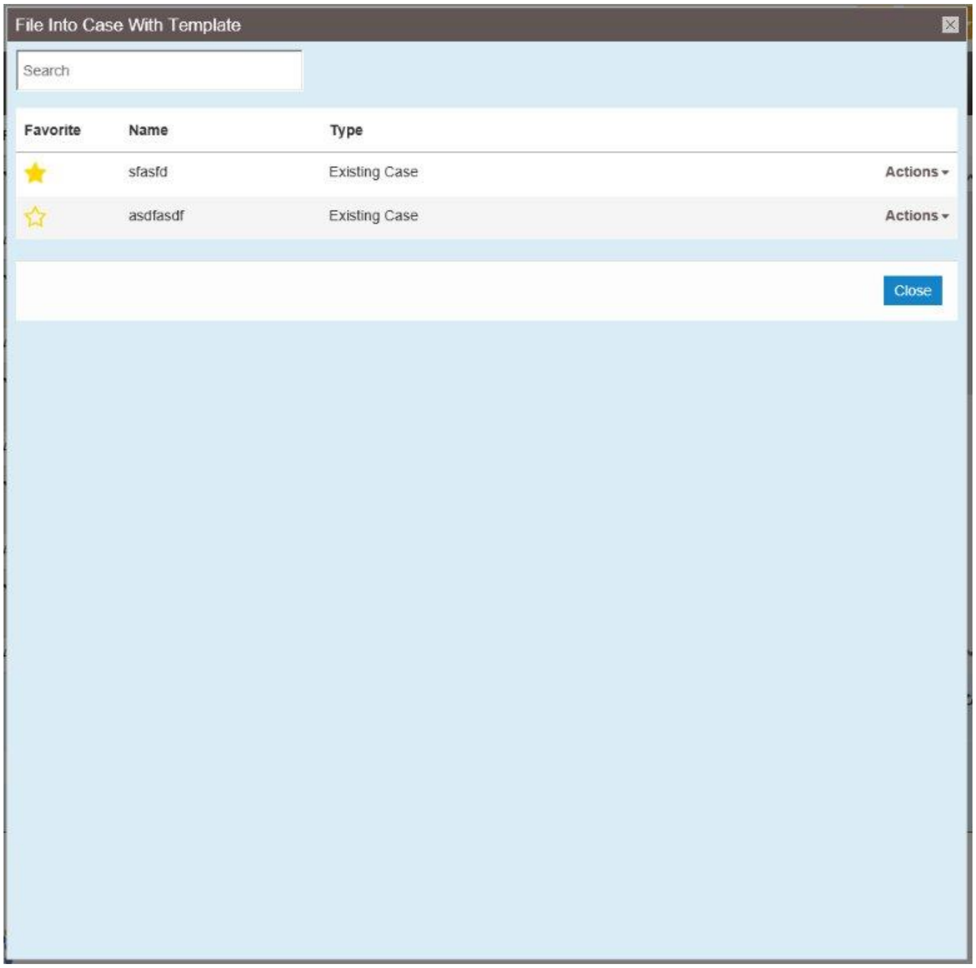


Figure 8.26 – File Into Case With Template Page

3. Locate the template that you want to use for the case you are filing into. From the **Actions** drop-down list for the specified template, select **Use Template**.

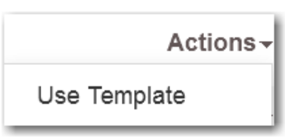


Figure 8.27 – Actions Drop-Down List for Existing Case Templates

The template that you selected is displayed. The **Case Information** and **Party Information** fields are already populated since this is an existing case. You can add additional parties.

4. Complete the filing details in the **Filings** section.
5. Complete the fields in the **Fees** section.
6. Click either 

or 

.

Note: If you save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue your filing.

Clicking Summary displays a page that reflects your filing.

7. If you click Summary, review the page, and then click Submit.

   A new **Envelope** of your filing is included on the *Filing History* page.

Viewing Template Details

You can view a template that you previously created.

To view the details of an existing template, perform the following steps:

1. From the **Actions** drop-down list, select **Templates**.

   The *Templates* page is displayed.

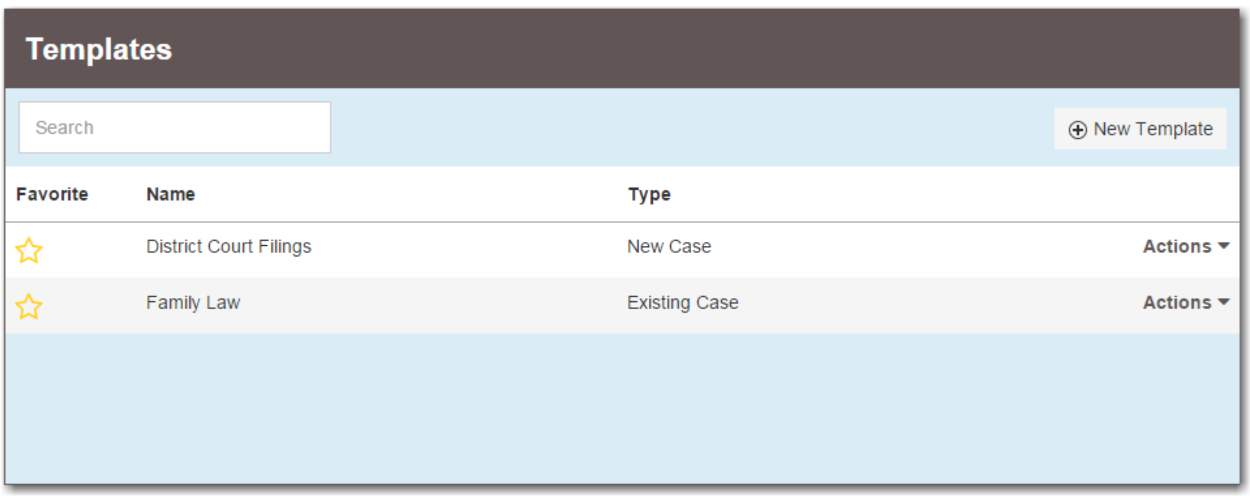


Figure 8.28 – Templates Page

2. Locate the template that you want to view. From the **Actions** drop-down list for the specified template, select **View Template Details**.

   The last version of the template that you saved is displayed.

Deleting a Template

You can delete a template that you no longer need.

To delete an existing template, perform the following steps:

1. From the **Actions** drop-down list, select **Templates**.

   The *Templates* page is displayed.

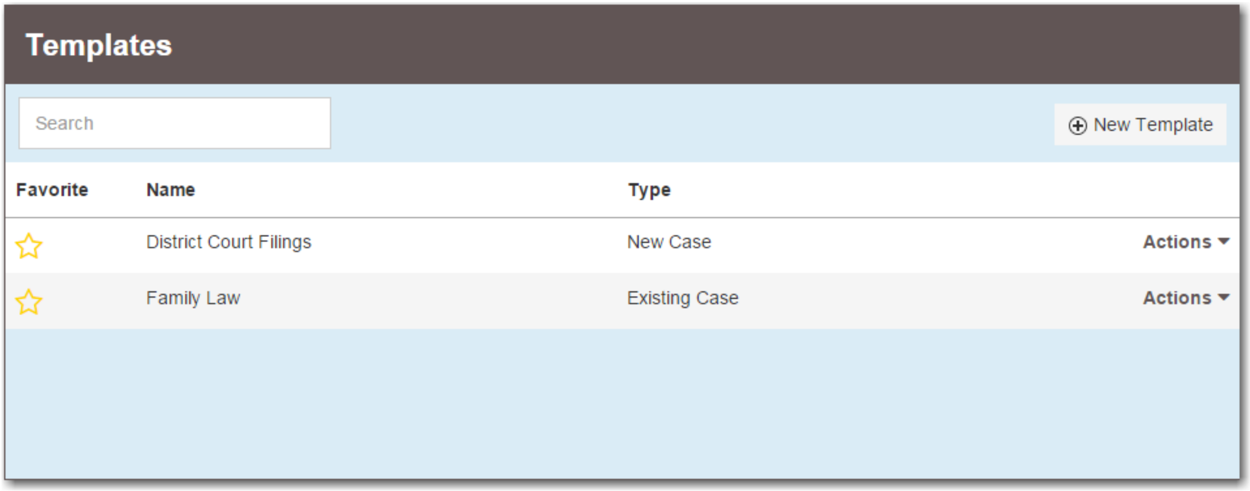


Figure 8.29 – Templates Page

2. Locate the template that you want to delete. From the **Actions** drop-down list for the specified template, select **Delete Template**.

   The template is immediately deleted.

Chapter 9 Case Initiation

Topics Covered in This Chapter

You can initiate a case from the **Actions** drop-down list on the *Filer Dashboard* page or from the **New Filing** section on the *Filer Dashboard* page.

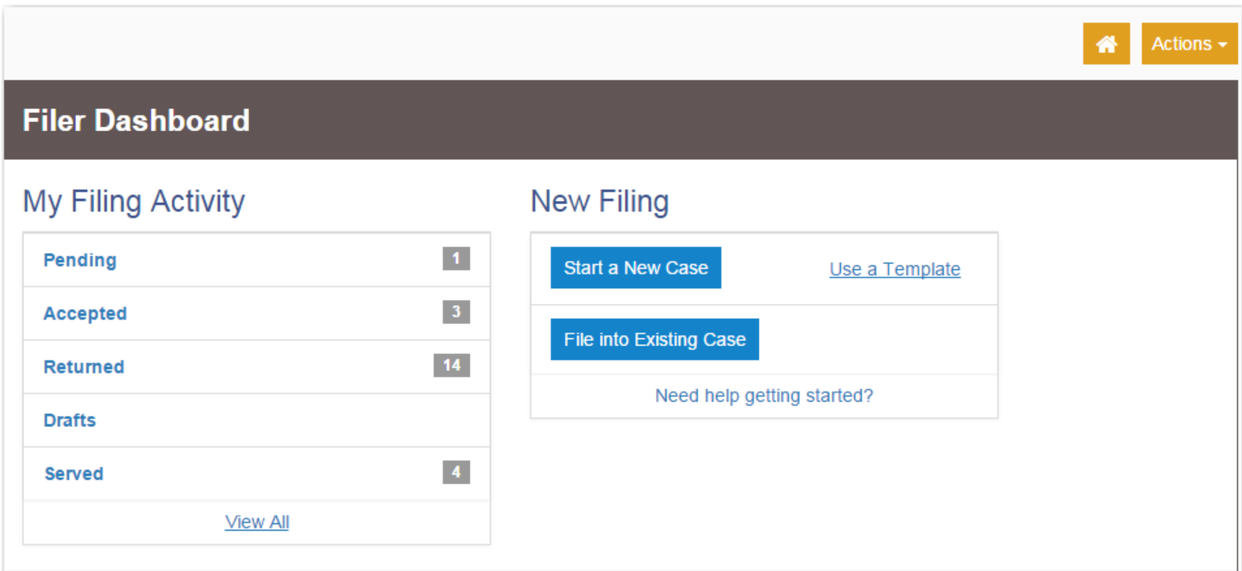


Figure 9.1 – Filer Dashboard Page

Filing a New Case

You can file a new case in a couple of ways.

To file a new case, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

   The *Start a New Case* page is displayed.
2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section:

   Note: A red box around the field indicates that it is required.

   a. Select your court location from the **Location** drop-down list.

Note: The court location is generally the county or district court where you will be doing the filing.

b. Select the specific court from the **Refine Location** drop-down list.

Note: The location filtering feature is configured by Tyler and may not be available on your system.

Note: The items in this list are limited to only the courts in the county or district that you previously selected.

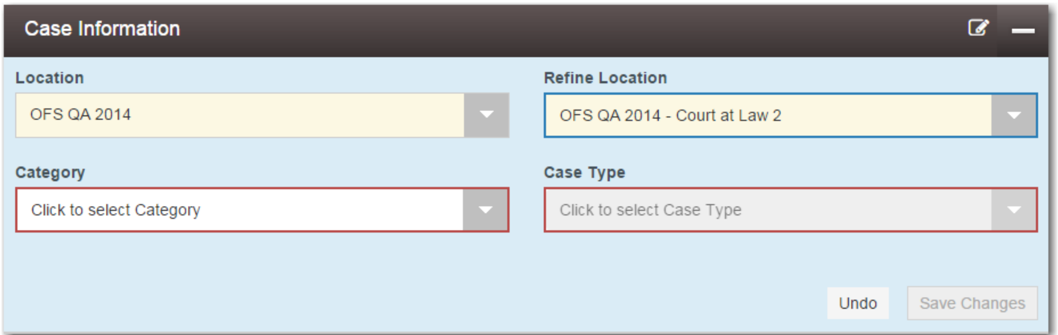


Figure 9.2 – Refine Location Drop-Down List in the Case Information Section

c. Select the category from the **Category** drop-down list.

Note: The items in this list are determined by the location you selected.

d. Select the case type from the **Case Type** drop-down list.

Note: The items in this list are determined by the category you selected.

The fee associated with the case type is displayed.

3. After completing the required fields, click Save Changes.

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

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. In the **Party Information** section, enter the information for the first party on the case. Indicate whether the party is a business or agency by selecting the **Party is a Business/Agency** check box.

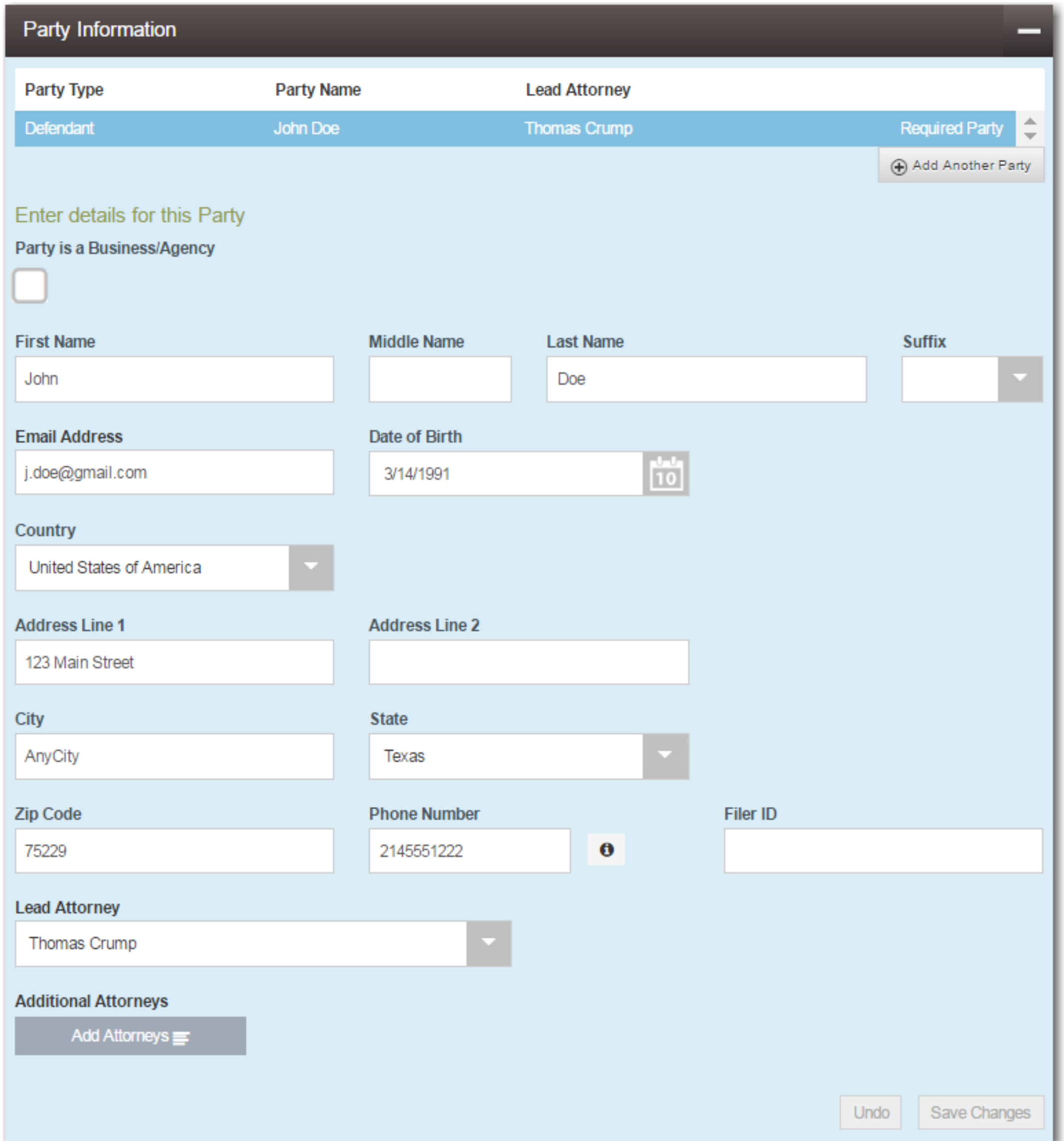


Figure 9.3 – Party Information Section

2. Complete the **First Name**, **Middle Name** (if applicable), and **Last Name** fields.
3. Type the email address in the **Email Address** field.
4. Type the party's date of birth in the **Date of Birth** field, or select a date from the calendar.

Note: The Date of Birth field is configured by Tyler and may not be available on your system.

5. Select the country from the **Country** drop-down list.

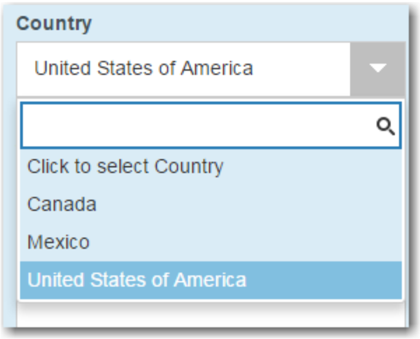


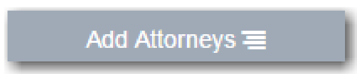
Figure 9.4 – Country Drop-Down List

6. For a party in the United States, complete the **Address**, **City**, **State**, **Zip Code**, **Phone Number**, and **Filer ID** fields.

   For a party in Mexico, complete the **Address**, **City**, **State**, **Postal Code**, **Phone Number**, and **Filer ID** fields.

   For a party in Canada, complete the **Address**, **City**, **Postal Code**, **Phone Number**, and **Filer ID** fields. Select the province from the **Province** drop-down list.
7. Select a lead attorney from the **Lead Attorney** drop-down list.

   Note: If you select Pro Se from the Lead Attorney drop-down list, the system displays "Pro Se" as the lead attorney instead of the party's actual name when viewing filing details.

   After you select a lead attorney, the **Additional Attorneys** field is displayed.
8. To add additional attorneys to the case, click 

.

   Note: The Add Attorneys button can be removed at the customer's request.

   The *Add Attorneys* dialog box is displayed.

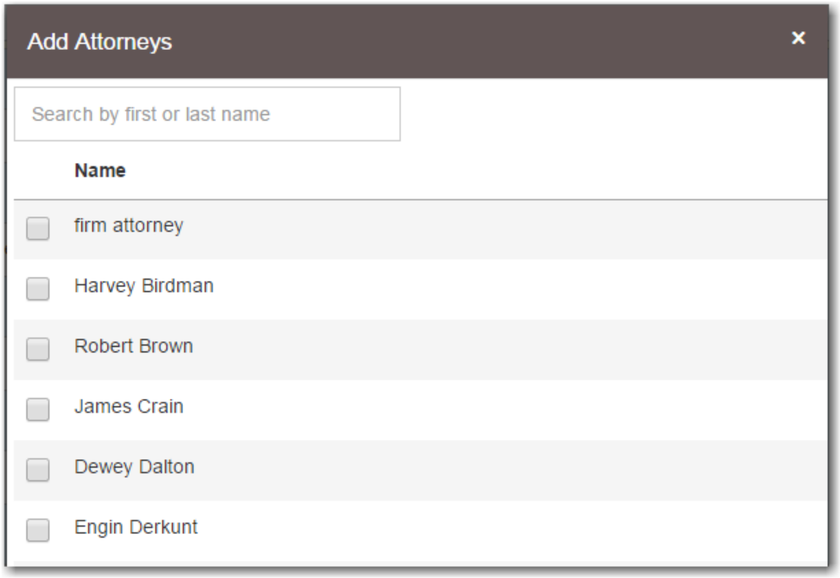


Figure 9.5 – Add Attorneys Dialog Box

9. Select the check boxes for each attorney that you want to add to the case. When you are finished, click Close.

   The additional attorneys that you selected are displayed in the **Additional Attorneys** field.

Figure 9.6 – Lead Attorney and Additional Attorneys Fields

10. If you want to add another party to the filing, click Add Another Party, and then enter the party information for the second party.

    Note: After all attorneys for both parties have been selected, the lead attorney's name is displayed next to the specified party, along with the number of additional attorneys that are also associated with the party.

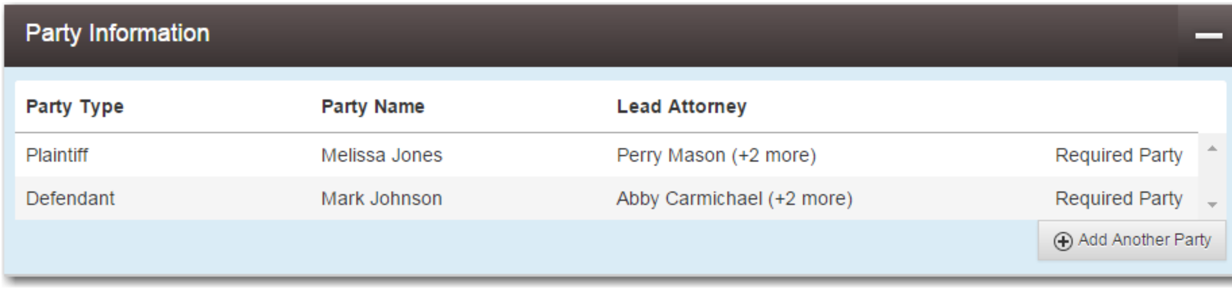


Figure 9.7 – Party Information Section with Lead Attorneys Displayed

11. After completing the fields for all parties, click Save Changes .

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

Display "Pro Se" for Party Name

You can select **Pro Se** in the **Lead Attorney** field when filing a case, filing into an existing case, or filing a case using a template.

Pro Se is displayed for the specified party in place of the party's actual name in the following places in the system:

- On case filing screens, including when using templates

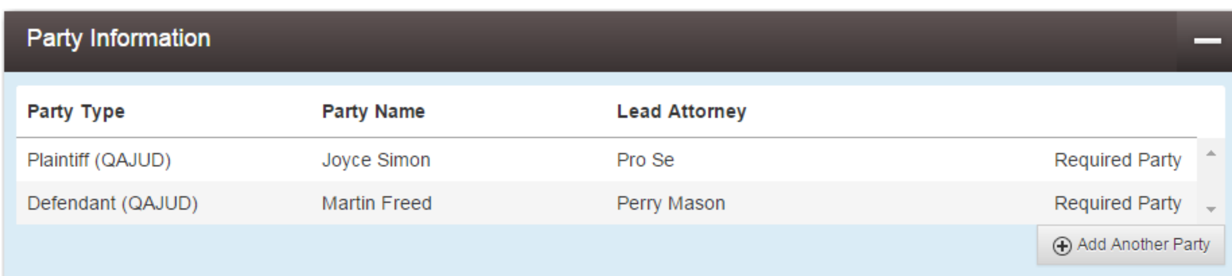


Figure 9.8 – Party Information Section on Case Filing Screen

- When viewing envelope details

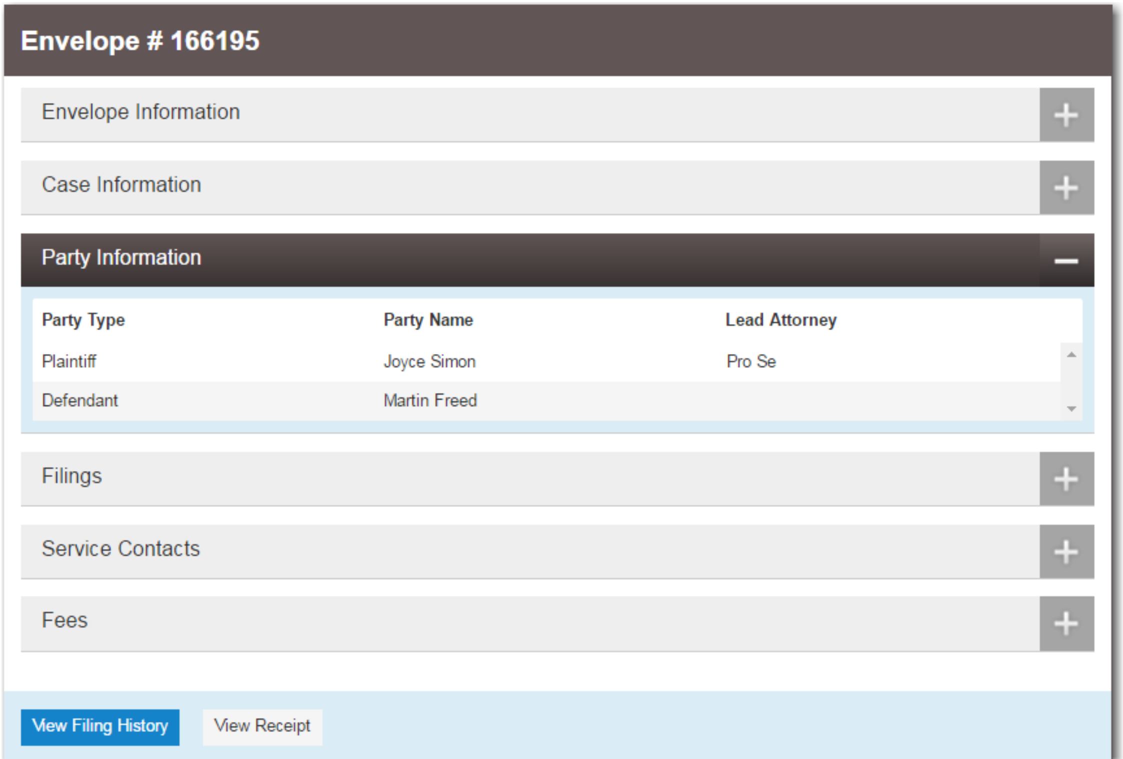


Figure 9.9 – Envelope Page Displaying Filing Details

Entering Filing Details

The **Filings** section allows you to enter the filing details and calculate the fees associated with the filing.

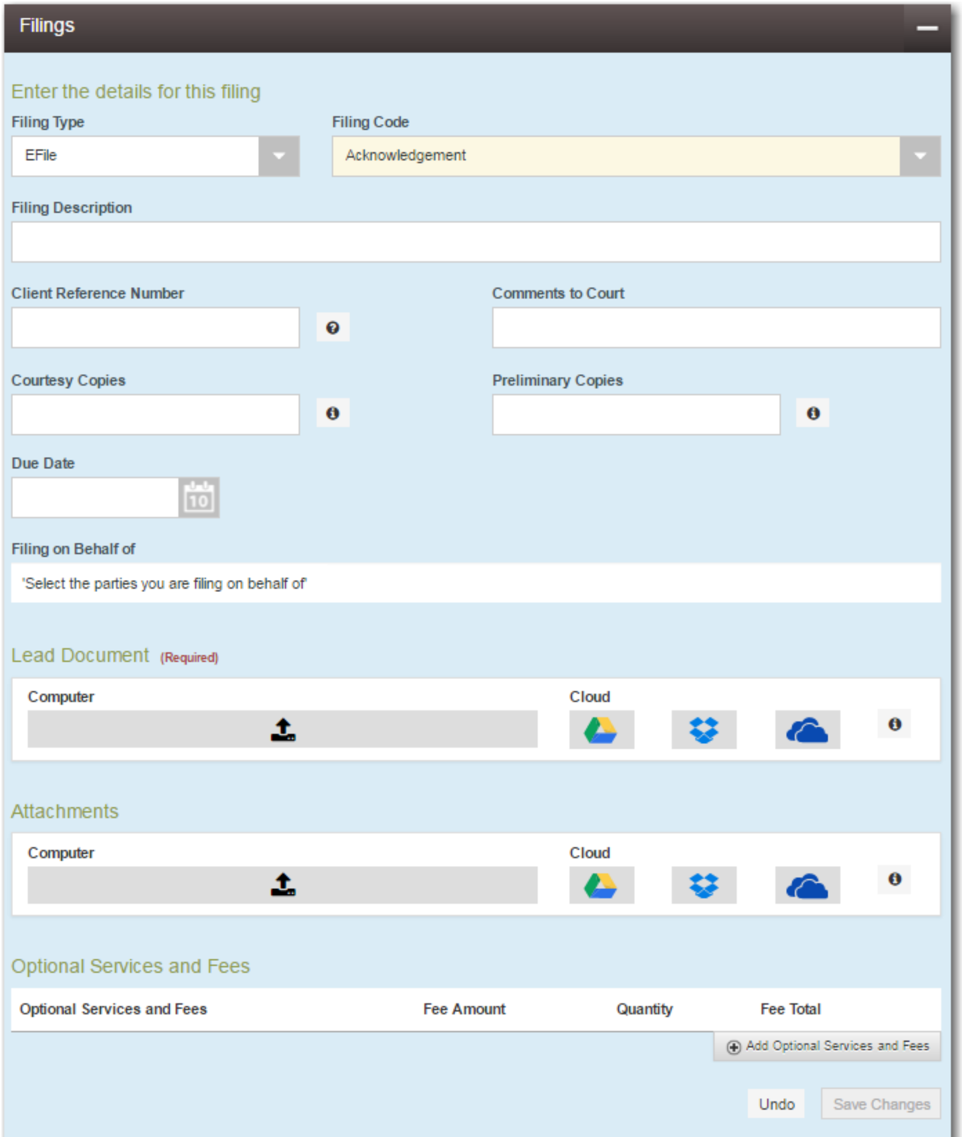


Figure 9.10 – Filings Section

To enter the filing details, perform the following steps:

1. Enter the filing details for the case in the **Filings** section:
    a. Select a filing type from the **Filing Type** drop-down list.
    b. Select a filing code from the **Filing Code** drop-down list.

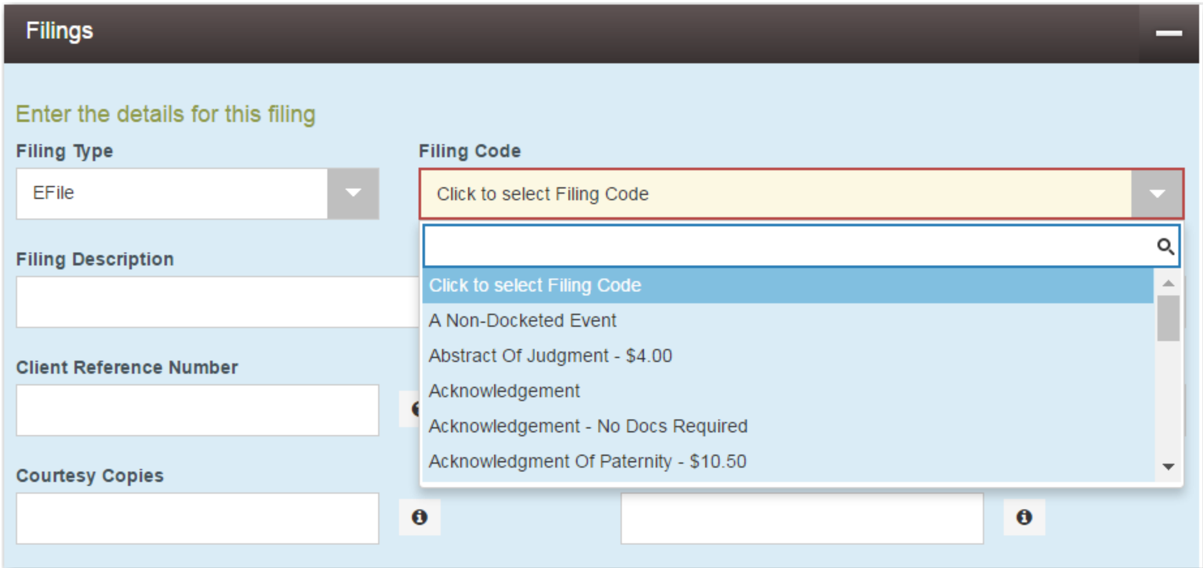


Figure 9.11 – Filing Code Drop-Down List

Note: Depending on your system configuration, some filing codes cause the Due Date field to be enabled.

After you select the filing code, the fee associated with the filing code is displayed.

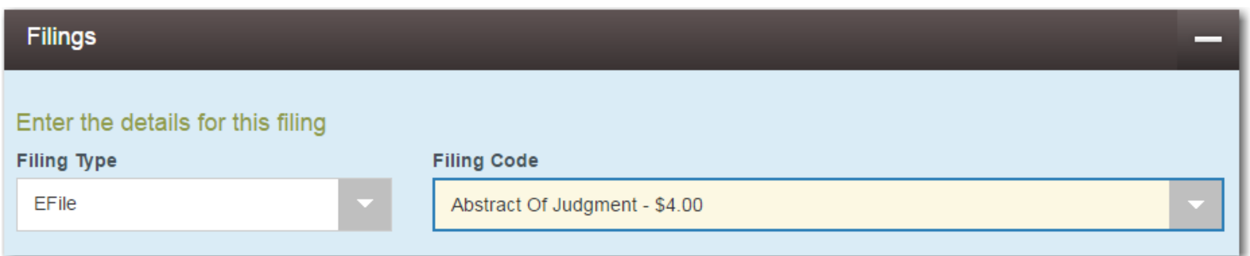


Figure 9.12 – Filing Code Drop-Down List with the Fee Displayed

c. Type a description of the filing in the **Filing Description** field.

d. Type a client reference number in the **Client Reference Number** field.

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

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

Note: The Due Date field is configured by Tyler and may not be available on your system.

A calendar is displayed from which you can select the specified date.

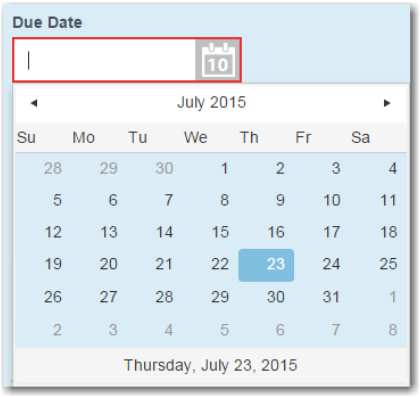


Figure 9.13 – Due Date Calendar

h. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

Note: The filing on behalf of feature is configured by Tyler and may not be available on your system.

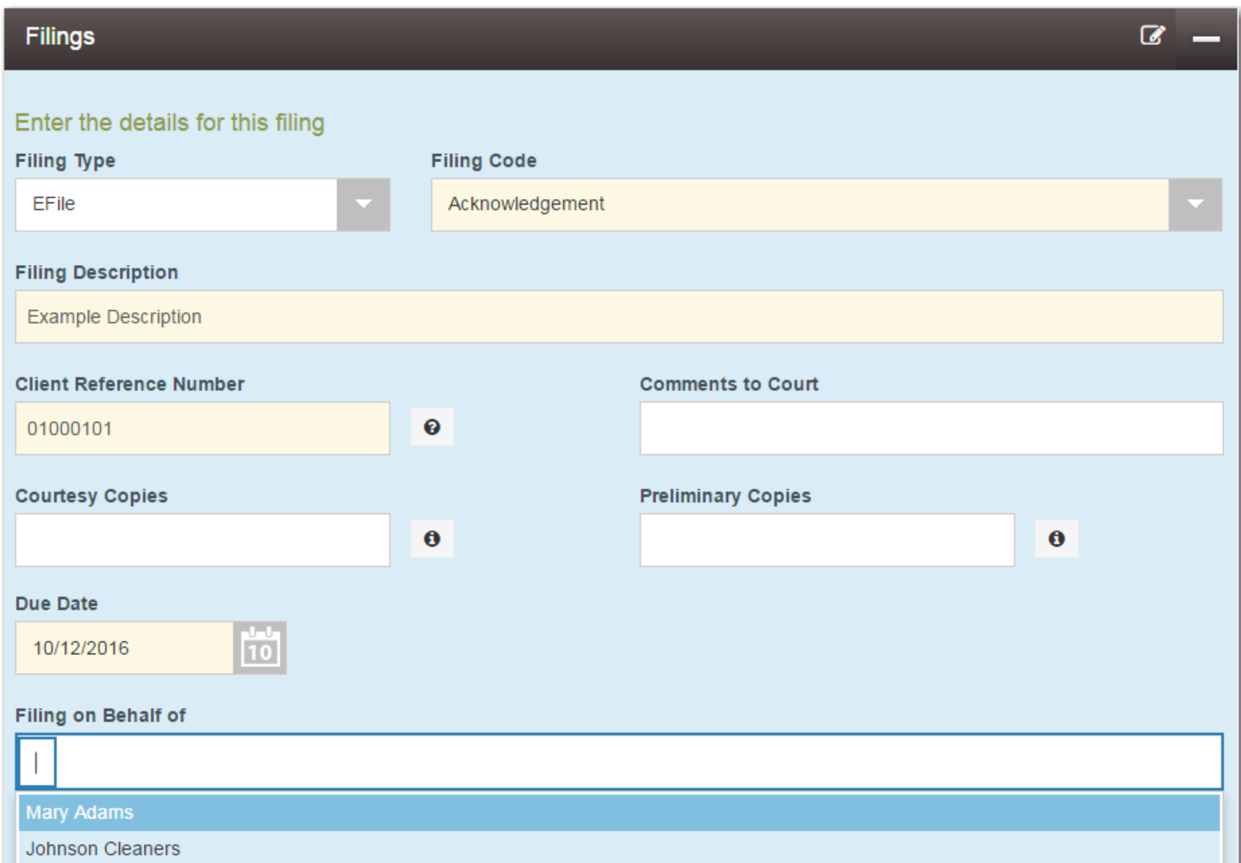


Figure 9.14 – Filing on Behalf of Field in the Filings Section

i. Click the **Lead Document** field to select a lead document to load. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. Only one document can be uploaded as a lead document.

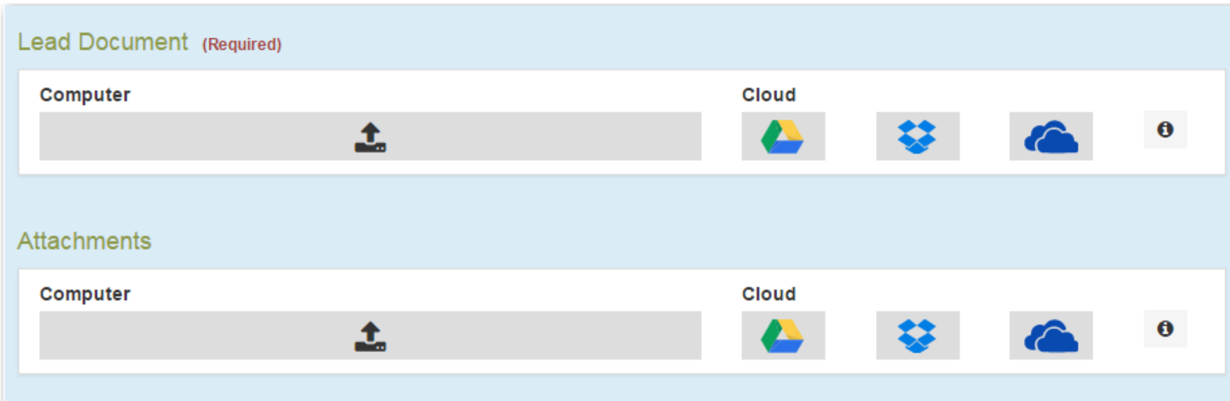


Figure 9.15 – Lead Document and Attachments Fields in the Filings Section

j. Type a name for the lead document in the **Description** field.

Note: A maximum length for the document name can be configured by Tyler at the customer's request. When configured, if a user assigns a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

k. Click the **Security** drop-down list to select the level of security to attach to the document.

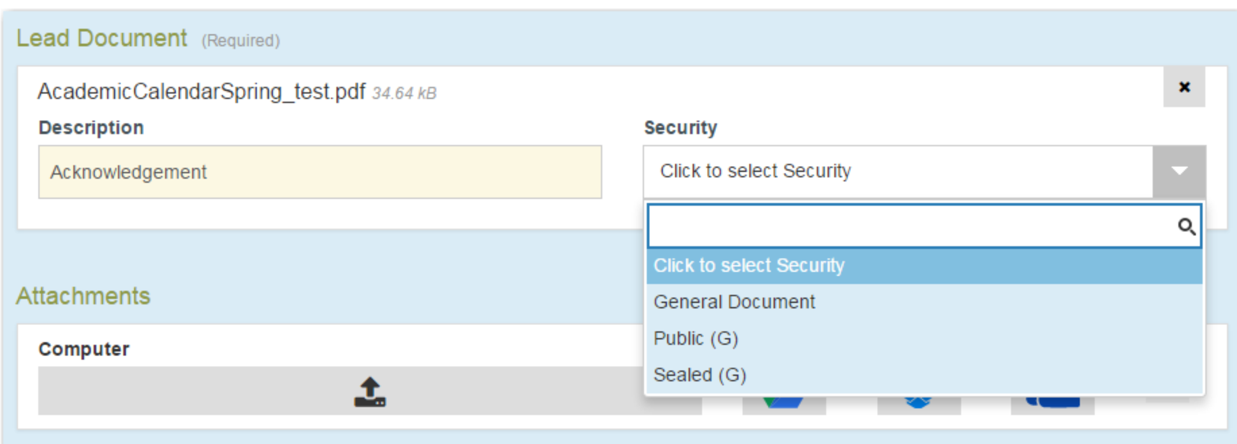


Figure 9.16 – Security Drop-Down List in the Lead Document Section

l. If you have attachments to load, click the **Attachments** field to select the documents to load. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

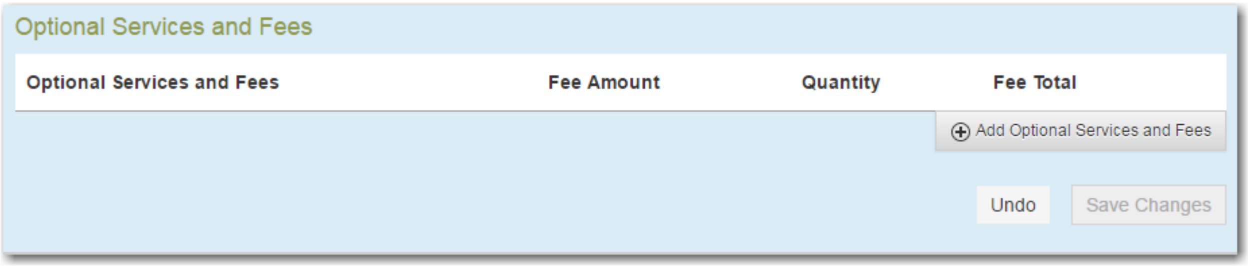
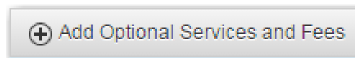


Figure 9.17 – Optional Services and Fees Section

m. If you want to add an optional service to the filing, click .

The **Optional Services and Fees** field is displayed.

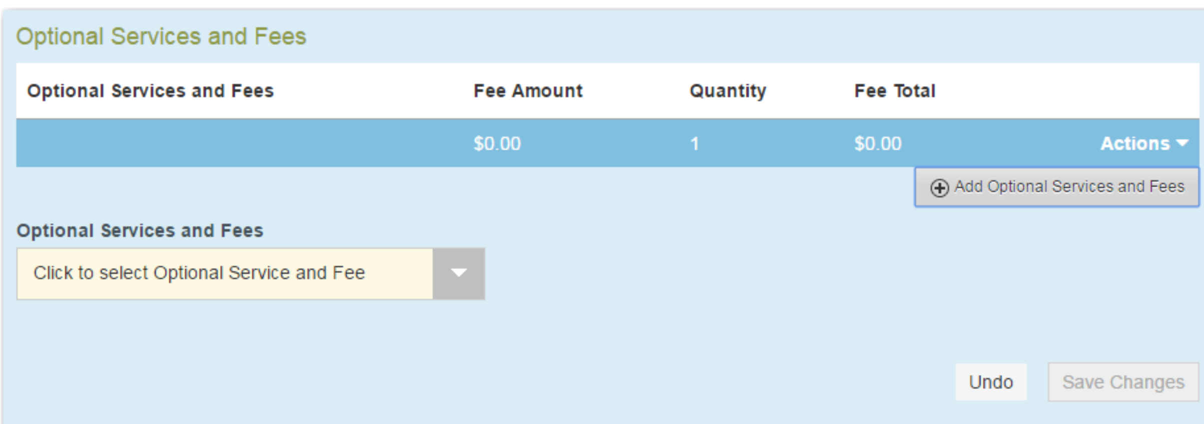


Figure 9.18 – Optional Services and Fees Field in the Optional Services and Fees Section

n. Select a service from the **Optional Services and Fees** drop-down list.

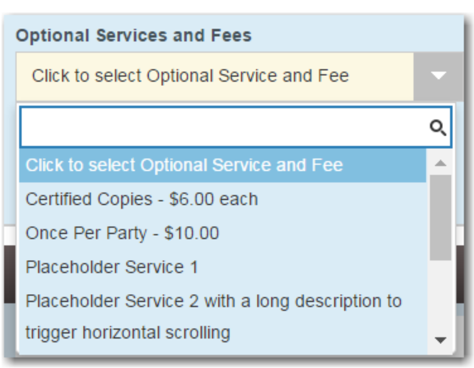


Figure 9.19 – Optional Services and Fees Drop-Down List

The fee associated with the optional service is displayed.

o. When you select the service for certified copies, type the number of copies that you want in the **Enter number of certified copies desired** field.

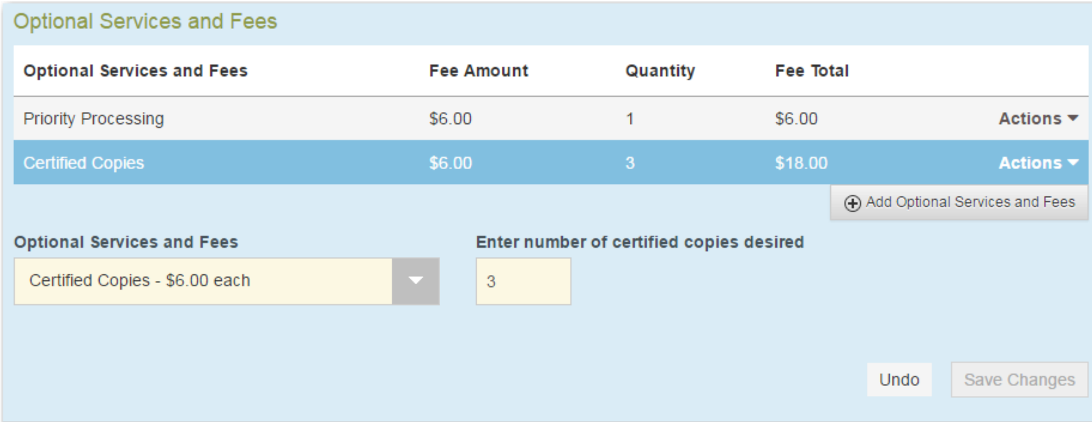


Figure 9.20 – Optional Services and Fees Section with Services Selected

p. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

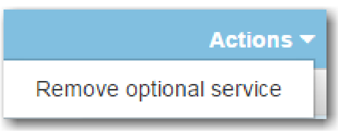


Figure 9.21 – Optional Service Actions Drop-Down List

q. When you are done adding optional services, click 

.

Figure 9.22 – Optional Services and Fees Section with Optional Services Saved

Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

r. Verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

s. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.

2. Complete the fields in the **Fees** section.

Note: Your credit card is authorized when submitted. However, the transaction fees are not posted 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.

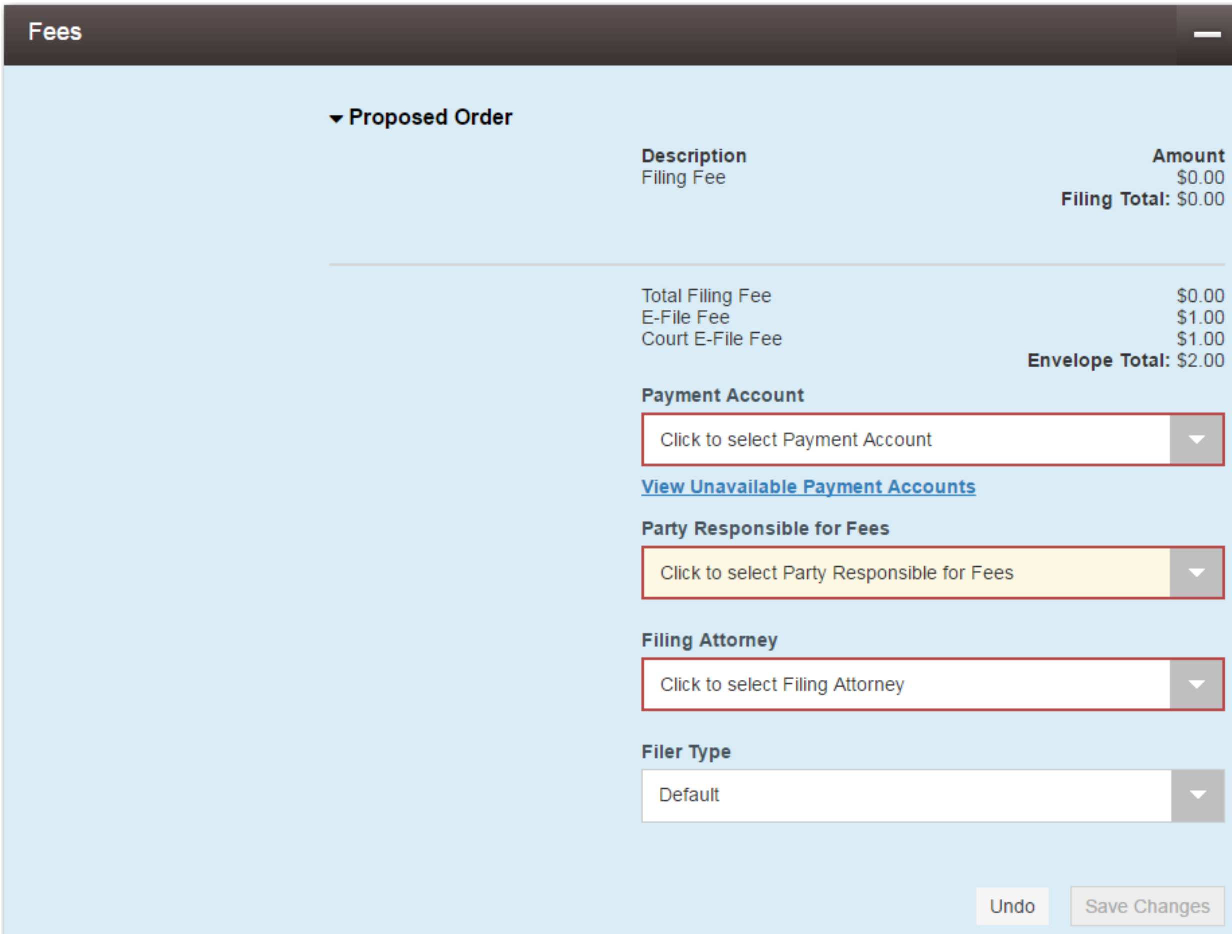


Figure 9.23 – Fees Section

a. Select the payment account from the **Payment Account** drop-down list.

Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

b. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

c. Select the filing attorney from the **Filing Attorney** drop-down list.

d. Select the filer type from the **Filer Type** drop-down list.

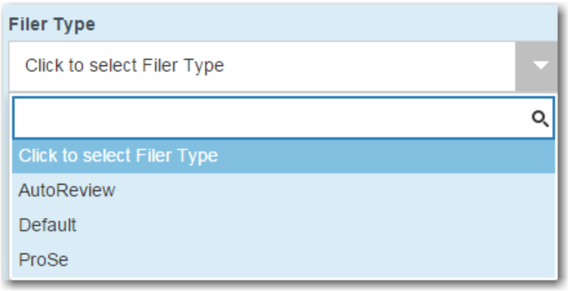


Figure 9.24 – Filer Type Drop-Down List

e. Click 

to save your changes, or click 

to cancel the action.

3. In the **Submission Agreements** section, select the check box for the appropriate submission agreement.

   Note: Submission agreements are configured by Tyler and may not be available on your system.

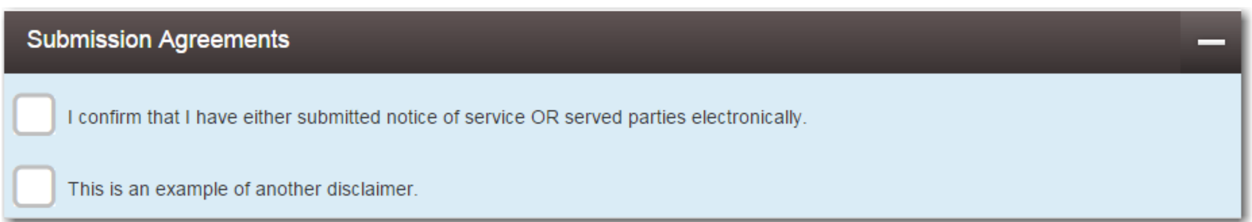


Figure 9.25 – Submission Agreements Section

4. After completing the fields in all of the sections on the page, perform one of the following actions:

   - Click 

to stop working on your filing and resume work at a later time. **Note: To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.**
   - Click 

to review a summary of your filing.

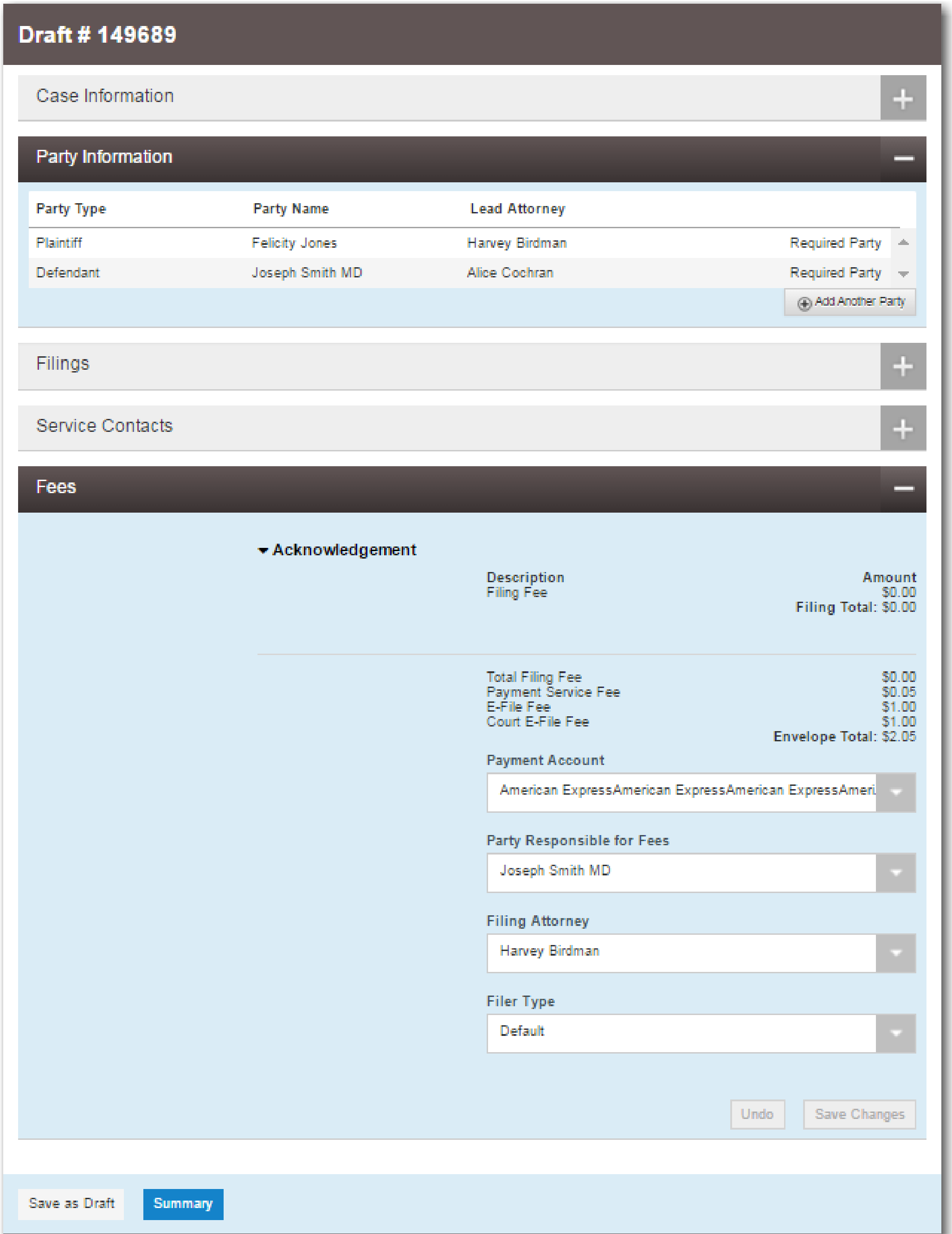


Figure 9.26 – Summary Page

5. If you clicked **Summary**, review the filing for accuracy. If you need to make any changes, click **Back** to return to the previous page. Make any necessary corrections, and then click **Summary** again.

6. When you are satisfied with the information in your filing, click **Submit**.

A new **Envelope** of your filing is included on the *Filing History* page.

Court Fees for Additional Case Parties

The system supports the ability to configure court fees that are to be applied to a party type.

Note: The ability to collect court fees is configured by Tyler and may not be available on your system.

When a specific combination of node, case type, and party type matches the configured rule, a court fee is assessed for additional parties that are added to a case. The configuration is customer-specific. For example, a fee may not be assessed for the first defendant, but a fee may be charged for each additional defendant.

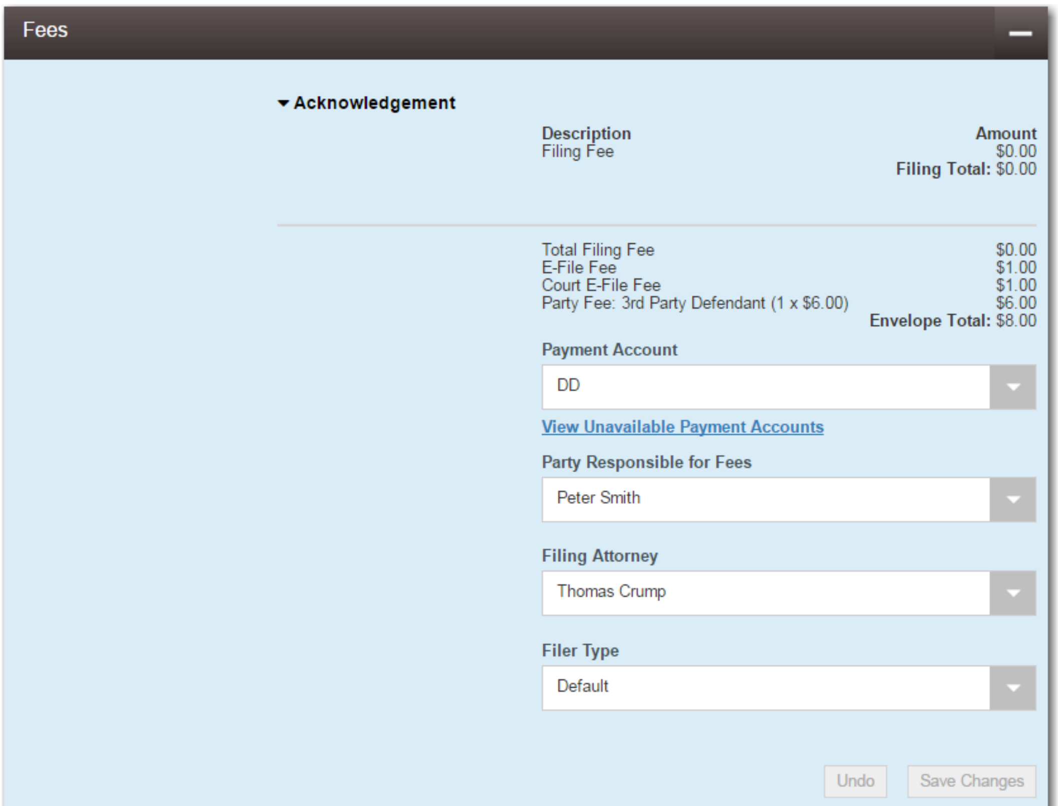


Figure 9.27 – Fees Section with Party Fees Displayed

Submission Agreements

The court may elect to have a submission agreement that is specific to the terms of the e-filing rules. In this case, a dialog box is displayed in which you must select a check box before continuing with your filing.

Note: Submission agreements are configured by Tyler and may not be available on your system.

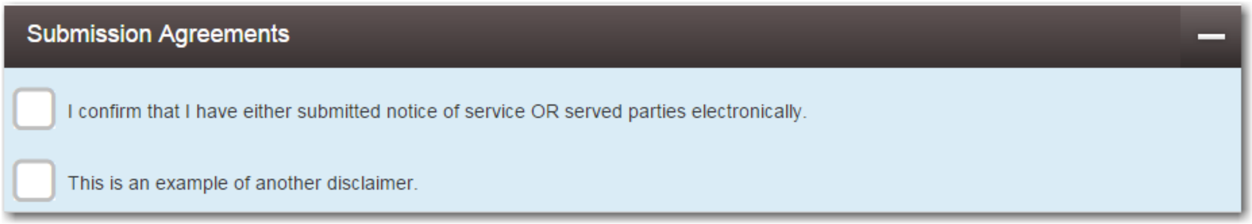


Figure 9.28 – Submission Agreements Dialog Box

Viewing the Envelope Summary

The envelope summary provides a summary of case information, such as the location of the filing, the parties involved in the case, filing details, fees, and payments for the case. The date and time that the filing was submitted are also displayed. The time stamp corresponds to the time zone in which the filing occurred.

The party, filings, and fees information must be complete before you can view the envelope summary. A payment account must be assigned to the case to complete the filing process.

To view the envelope summary, perform the following steps:

1. Complete the required information in the **Case Information**, **Party Information**, **Filings**, and **Fees** sections.

2. After you have completed the fields in each section, click 

.

   The *Envelope Summary* page is displayed.

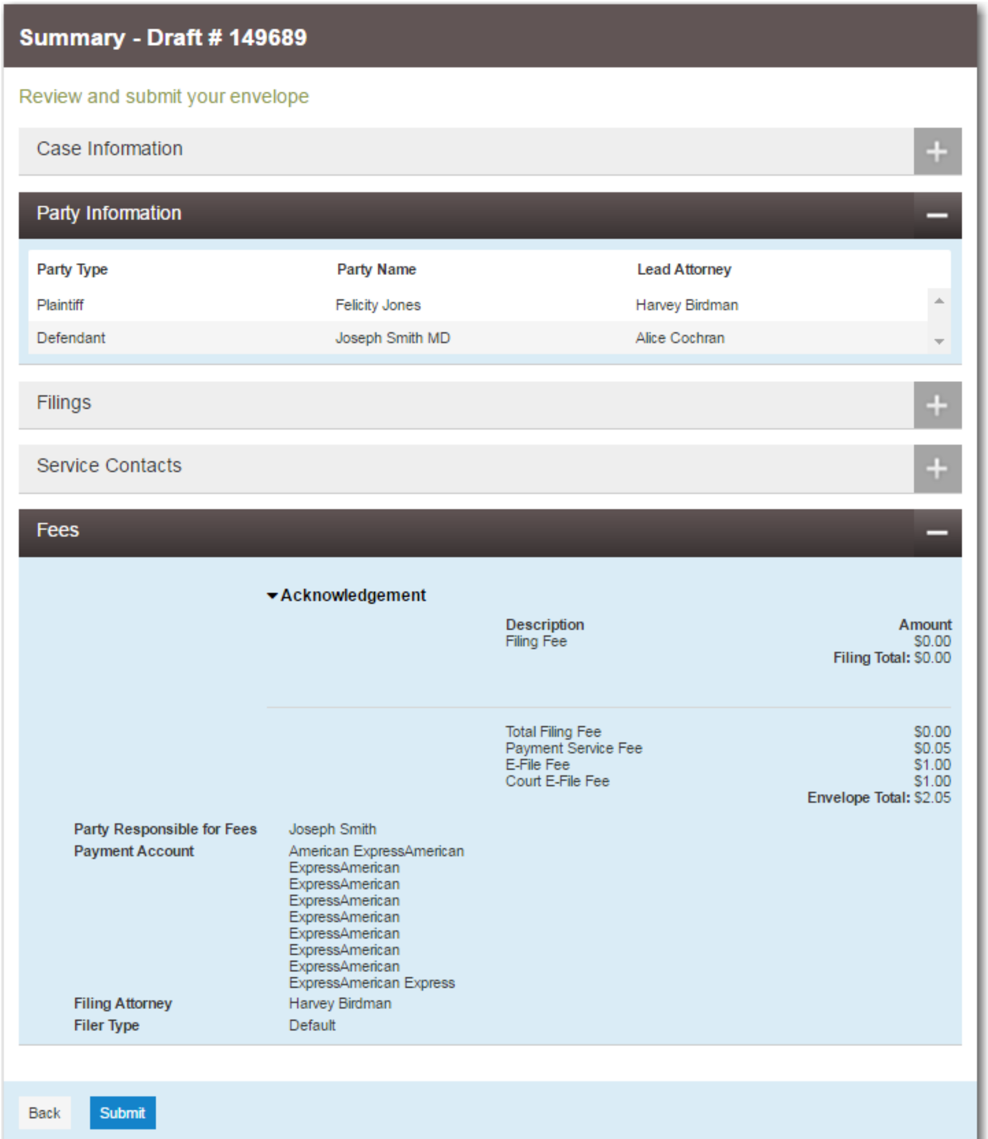


Figure 9.29 – Envelope Summary Page

3. Review the page. After you are satisfied with the information in your filing, click Submit.

Chapter 10 File into an Existing Case

Topics Covered in This Chapter

Once a new case has been created by the courts, you can file into the existing case.

Use one of the following methods to file into a case:

- On the *Filing History* page, locate the case that you want to file into. From the **Actions** drop-down list for the specified case, select **File Into Case**.
- On the *Bookmarks* page, locate the case that you want to file into. From the **Actions** drop-down list for the specified case, select **File Into Case**.
- On the *Filer Dashboard* page, click **File into Existing Case**.
- On the *Filer Dashboard* page, from the **Actions** drop-down list, select **File Into Existing Case**.

Filing into an Existing Case from the Filing History Page

To file into an existing case from the *Filing History* page, perform the following steps:

1. On the *Filer Dashboard* page, from the **Actions** drop-down list, click **Filing History**.

   The *Filing History* page is displayed.

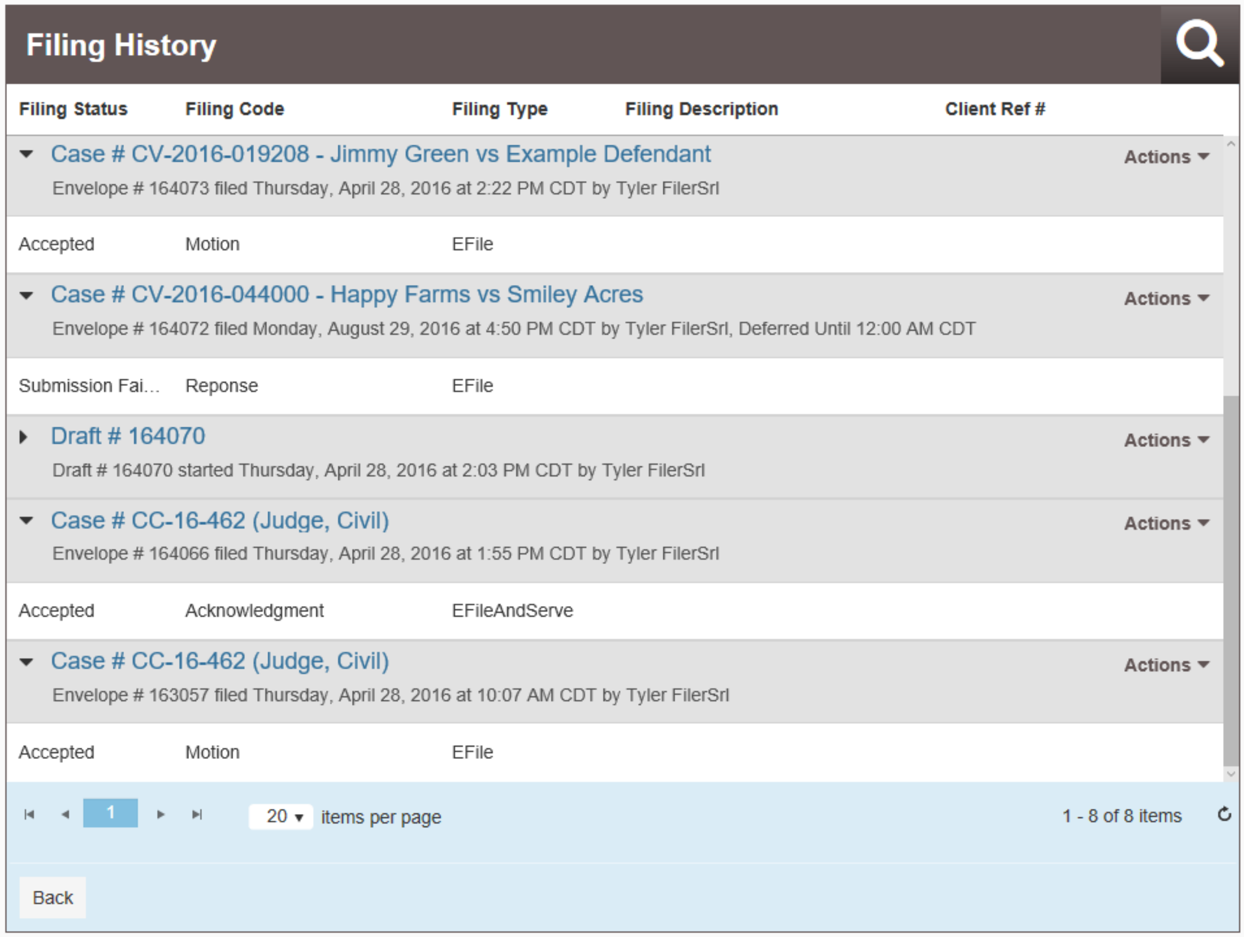


Figure 10.1 – Filing History Page

2. Locate the case that you want to file into.
3. From the **Actions** drop-down list for the specified case, select **File Into Case**.

Figure 10.2 – Actions Drop-Down List

The **Case Information** and **Party Information** fields are already populated since this is an existing case. You can immediately view the parties associated with the case.

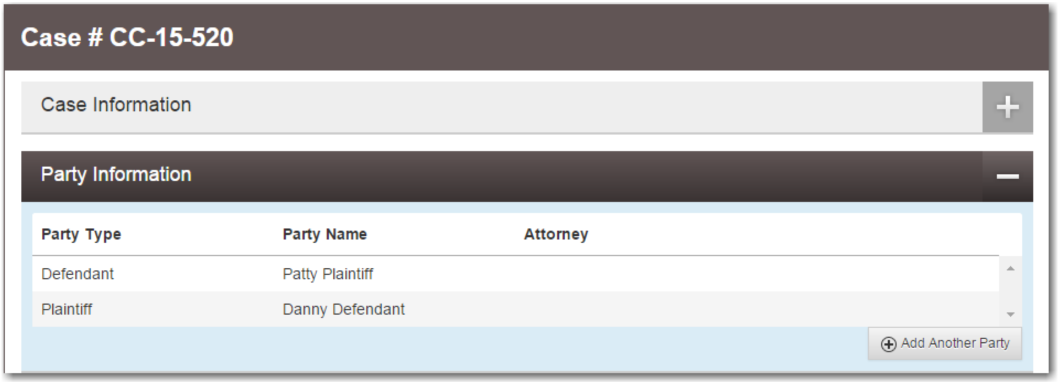


Figure 10.3 – Party Information Section Expanded for Existing Cases

When more than 100 parties are on a case, only the first party of each required type is displayed, along with a message that additional parties could not be displayed due to system constraints. Add additional parties to the case if you want.

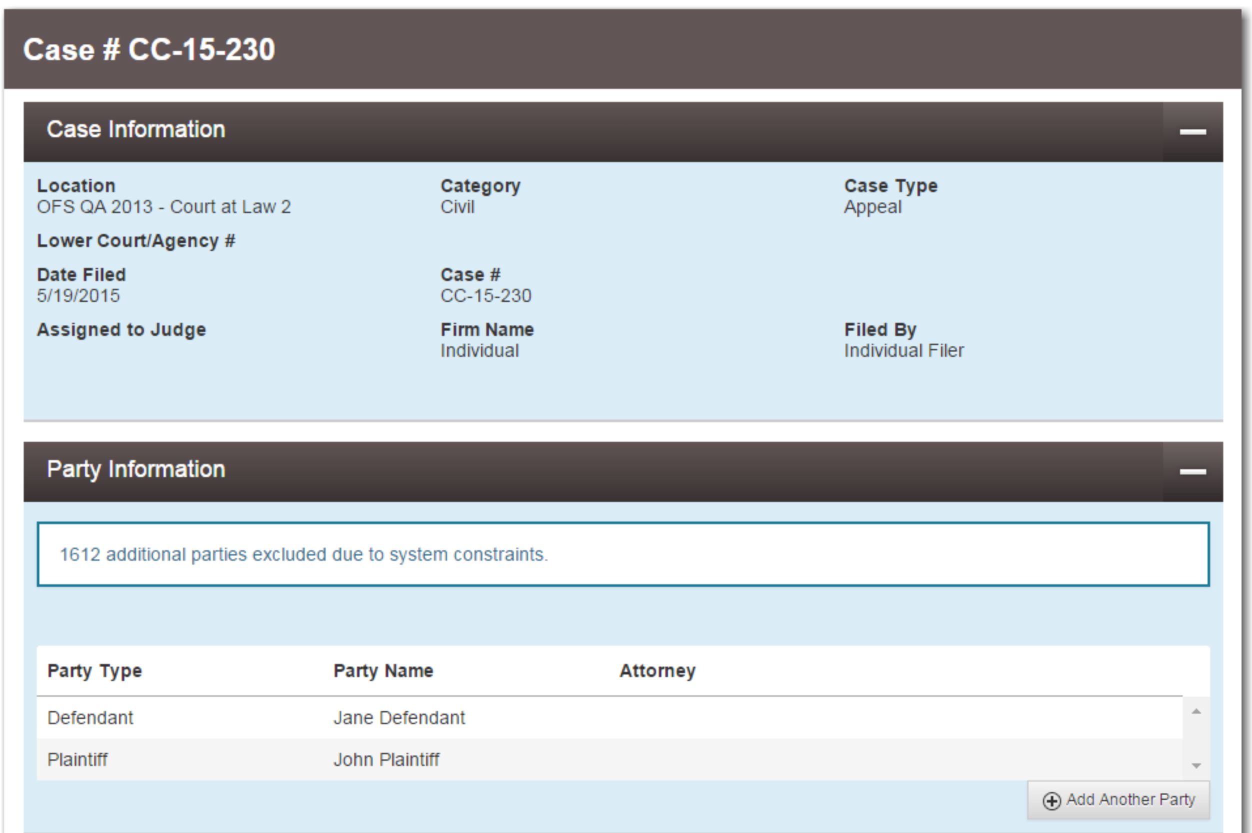


Figure 10.4 – Case Information and Party Information Sections

4. Complete the filing details in the **Filings** section.

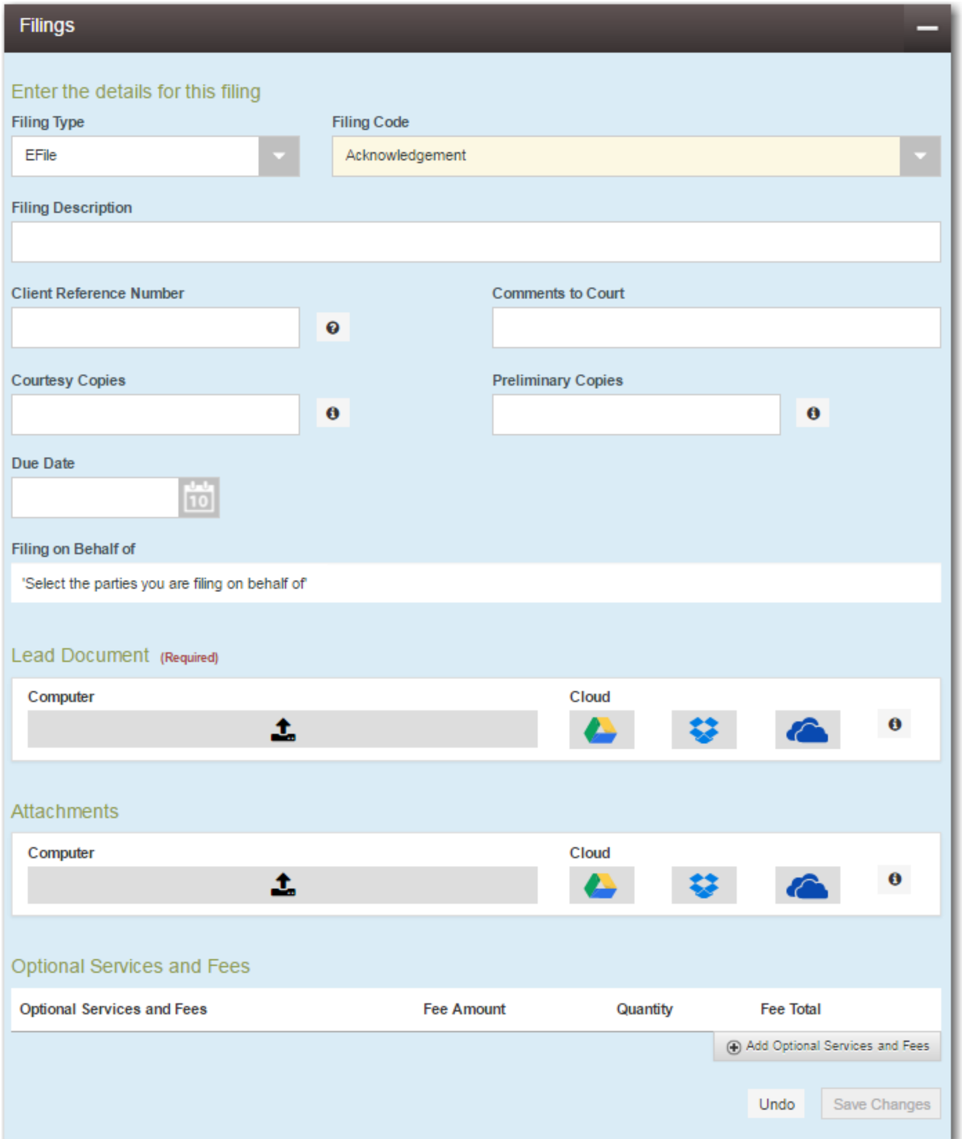


Figure 10.5 – Filings Section

a. Select a filing type from the **Filing Type** drop-down list.

   A default filing type can be configured for existing case filings. The default filing type can be set to **EFileAndServe** or just **EFile**.

   Note: Serve is not a default option.

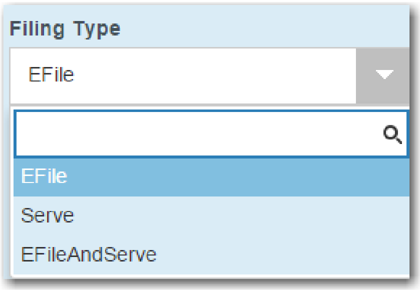


Figure 10.6 – Filing Type Drop-Down List

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

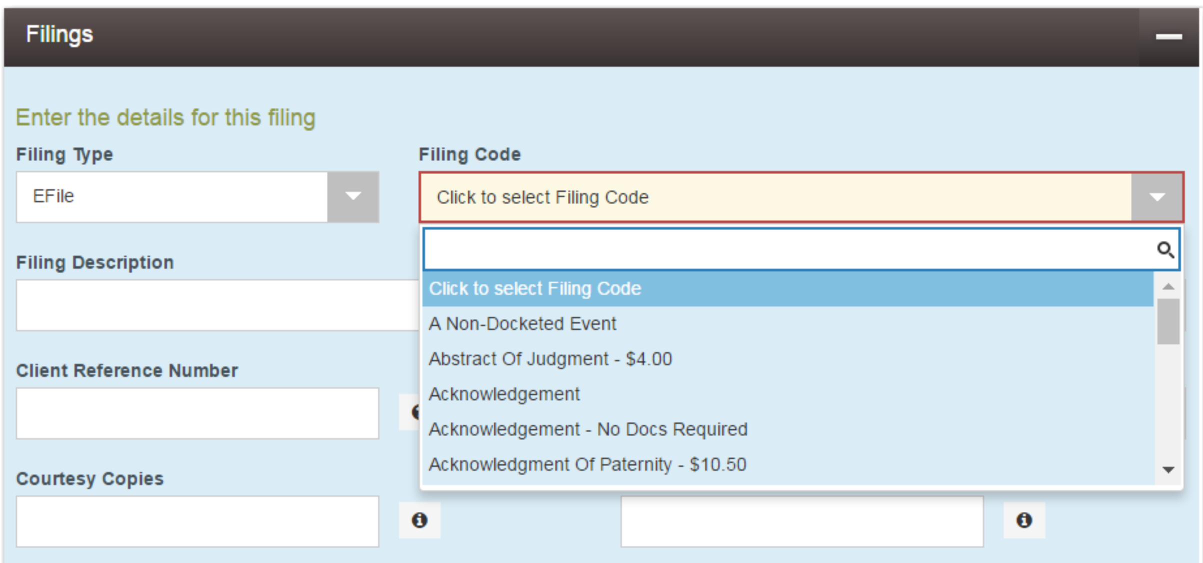


Figure 10.7 – Filing Code Drop-Down List

After you select the filing code, the fee associated with the filing code is displayed.

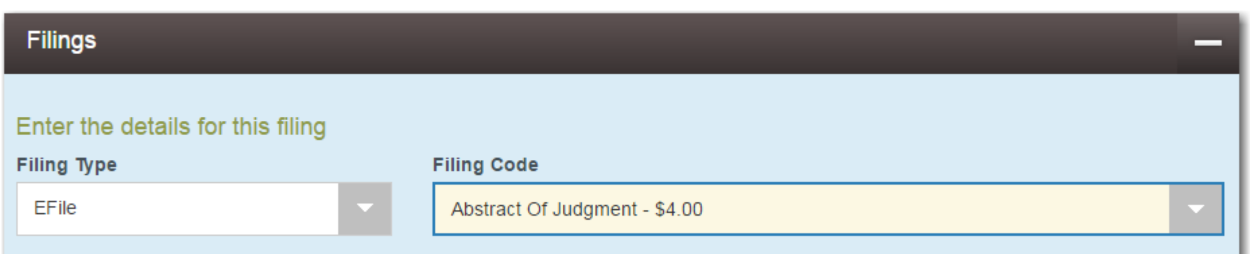


Figure 10.8 – Filing Code Field with the Fee Displayed

c. Type a description of the filing in the **Filing Description** field.

d. Type a client reference number in the **Client Reference Number** field.

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

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

Note: The Due Date field is configured by Tyler and may not be available on your system.

A calendar is displayed from which you can select the specified date.

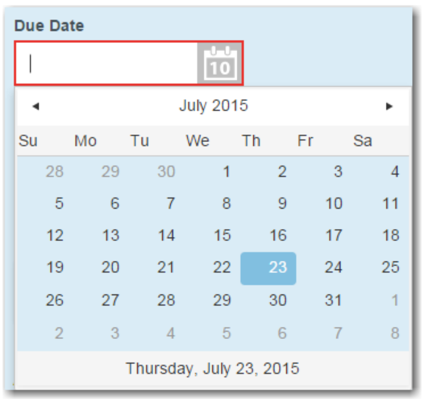


Figure 10.9 – Due Date Calendar

h. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

Note: The filing on behalf of feature is configured by Tyler and may not be available on your system.

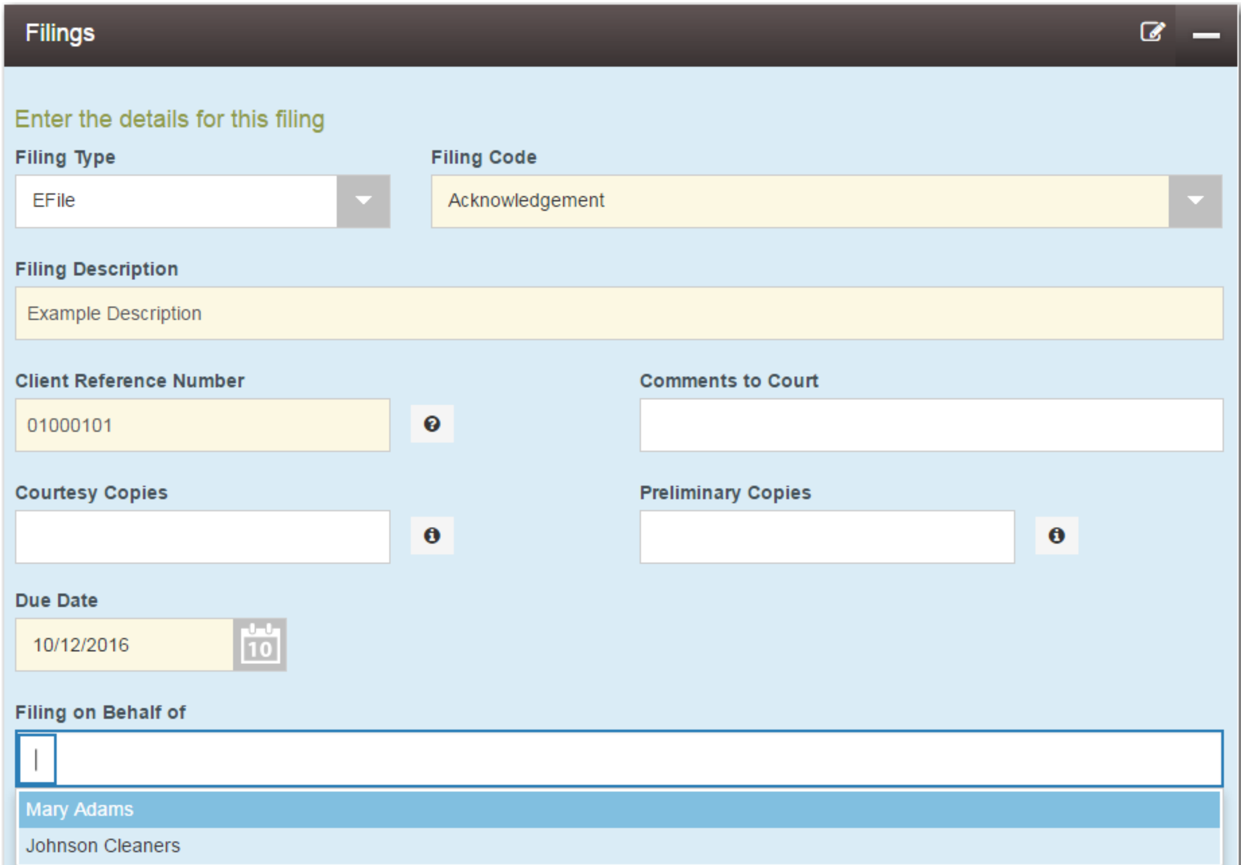


Figure 10.10 – Filing on Behalf of Field in the Filings Section

i. Click the **Lead Document** field to select a lead document to load. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. Only one document can be uploaded as a lead document.

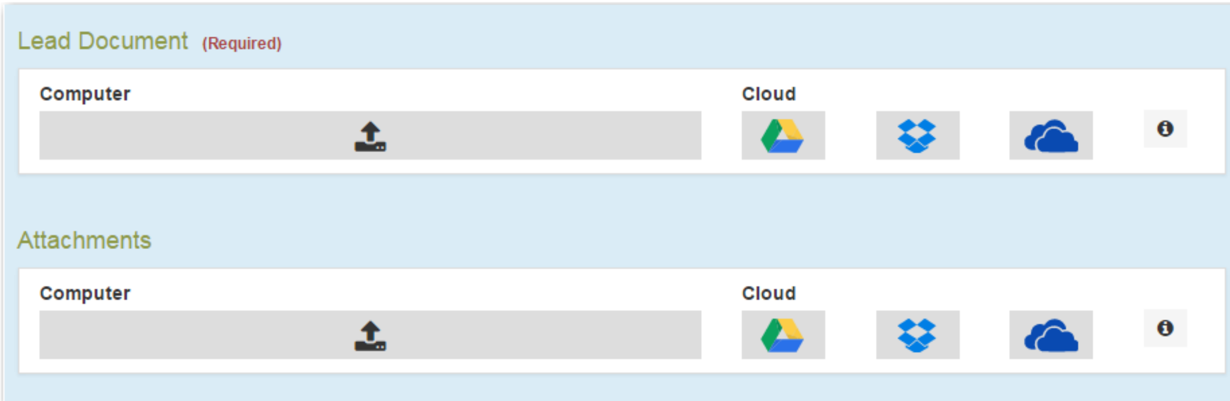


Figure 10.11 – Lead Document and Attachments Fields in the Filings Section

j. Type a name for the lead document in the **Description** field.

Note: A maximum length for the document name can be configured by Tyler at the customer's request. When configured, if a user assigns a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

k. Click the **Security** drop-down list to select the level of security to attach to the document.

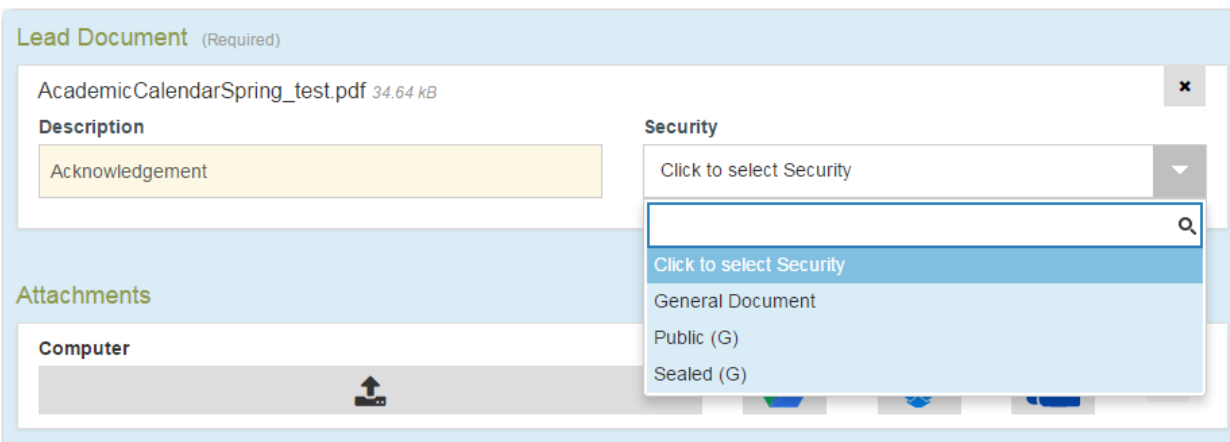


Figure 10.12 – Security Drop-Down List in the Lead Document Section

l. If you have attachments to load, click the **Attachments** field to select the documents to load. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

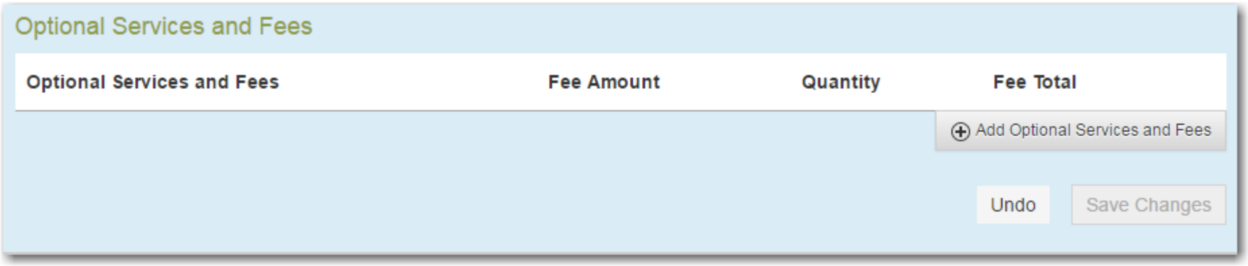
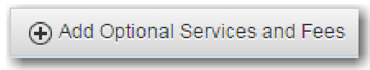


Figure 10.13 – Optional Services and Fees Section

m. If you want to add an optional service to the filing, click .

The **Optional Services and Fees** field is displayed.

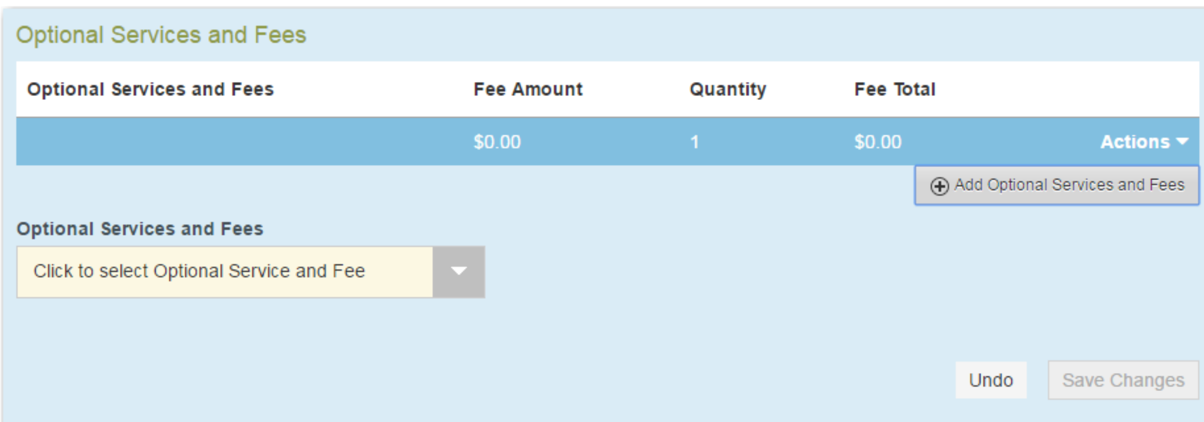


Figure 10.14 – Optional Services and Fees Field in the Optional Services and Fees Section

n. Select a service from the **Optional Services and Fees** drop-down list.

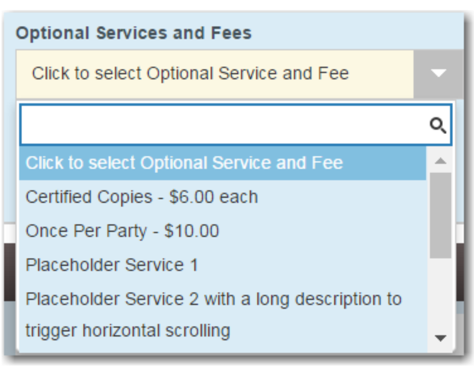


Figure 10.15 – Optional Services and Fees Drop-Down List

The fee associated with the optional service is displayed.

o. When you select the service for certified copies, type the number of copies that you want in the **Enter number of certified copies desired** field.

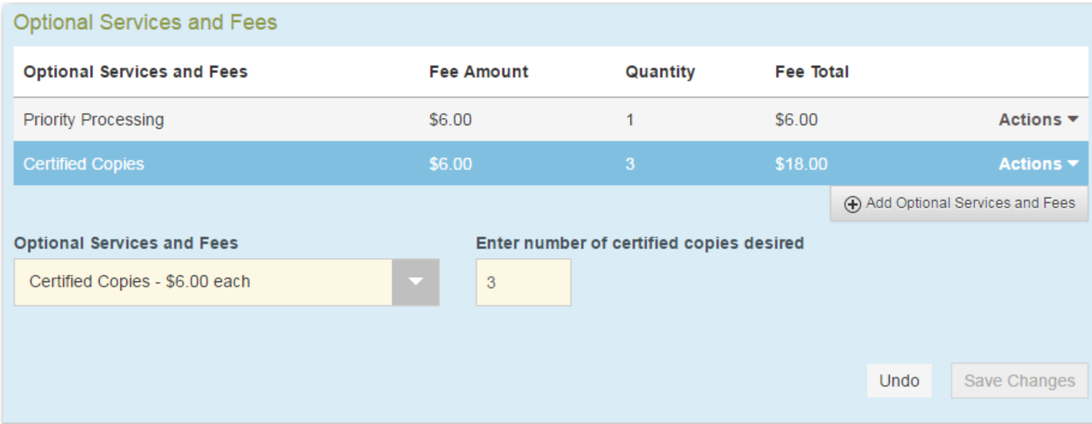


Figure 10.16 – Optional Services and Fees Section with Services Selected

p. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

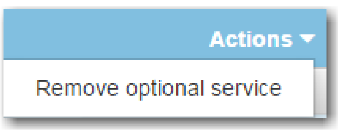


Figure 10.17 – Optional Service Actions Drop-Down List

q. When you are done adding optional services, click Save Changes.

Figure 10.18 – Optional Services and Fees Section with Optional Services Saved

Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

r. Verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

s. Click Save Changes to save your changes, or click Undo to cancel the action.

5. Complete the fields in the **Fees** section.

   Note: Your credit card is authorized when submitted. However, the transaction fees are not posted 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.

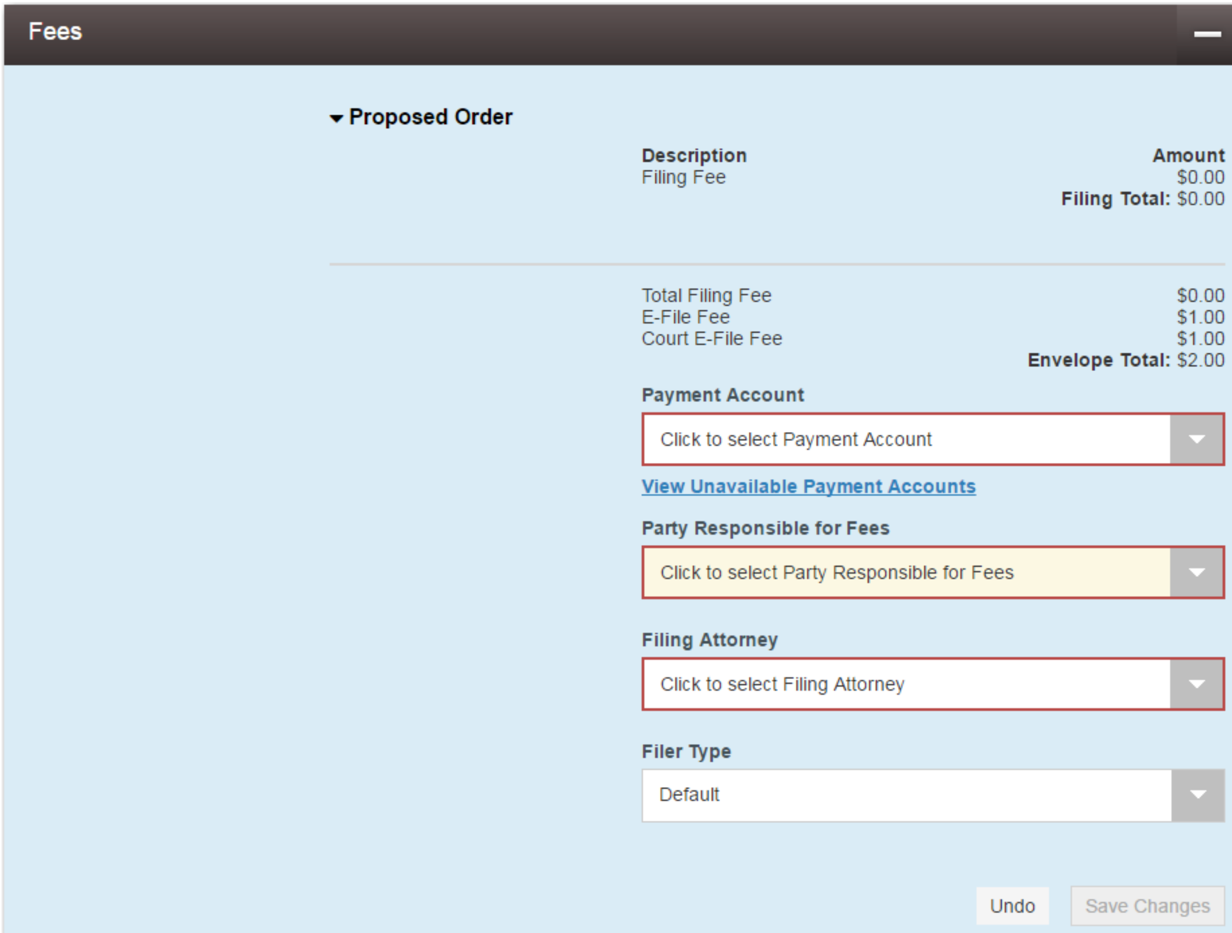


Figure 10.19 – Fees Section

   a. Select a payment account from the **Payment Account** drop-down list.

      Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

   b. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

   c. Select the filing attorney from the **Filing Attorney** drop-down list.

   d. Select the filer type from the **Filer Type** drop-down list.

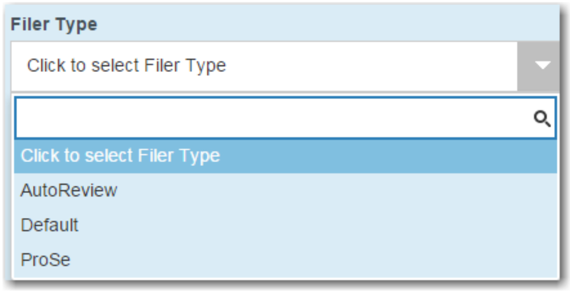


Figure 10.20 – Filer Type Drop-Down List

e. Click Save Changes to save your changes, or click Undo to cancel the action.

6. After completing the fields in all of the sections on the page, perform one of the following actions:

   - Click Save as Draft to stop working on your filing and resume work at a later time. **Note: To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.**

   - Click Summary to review a summary of your filing.

7. If you clicked Summary, review the filing for accuracy. If you need to make any changes, click Back to return to the previous page. Make any necessary corrections, and then click Summary again.

8. When you are satisfied with the information in your filing, click Submit.

   A new **Envelope** of your filing is included on the *Filing History* page.

Filing into an Existing Case from the Bookmarks Page

To file into an existing case from the *Bookmarks* page, perform the following steps:

1. On the *Filer Dashboard* page, from the **Actions** drop-down list, click **Bookmarks**.

   The *Bookmarks* page is displayed.

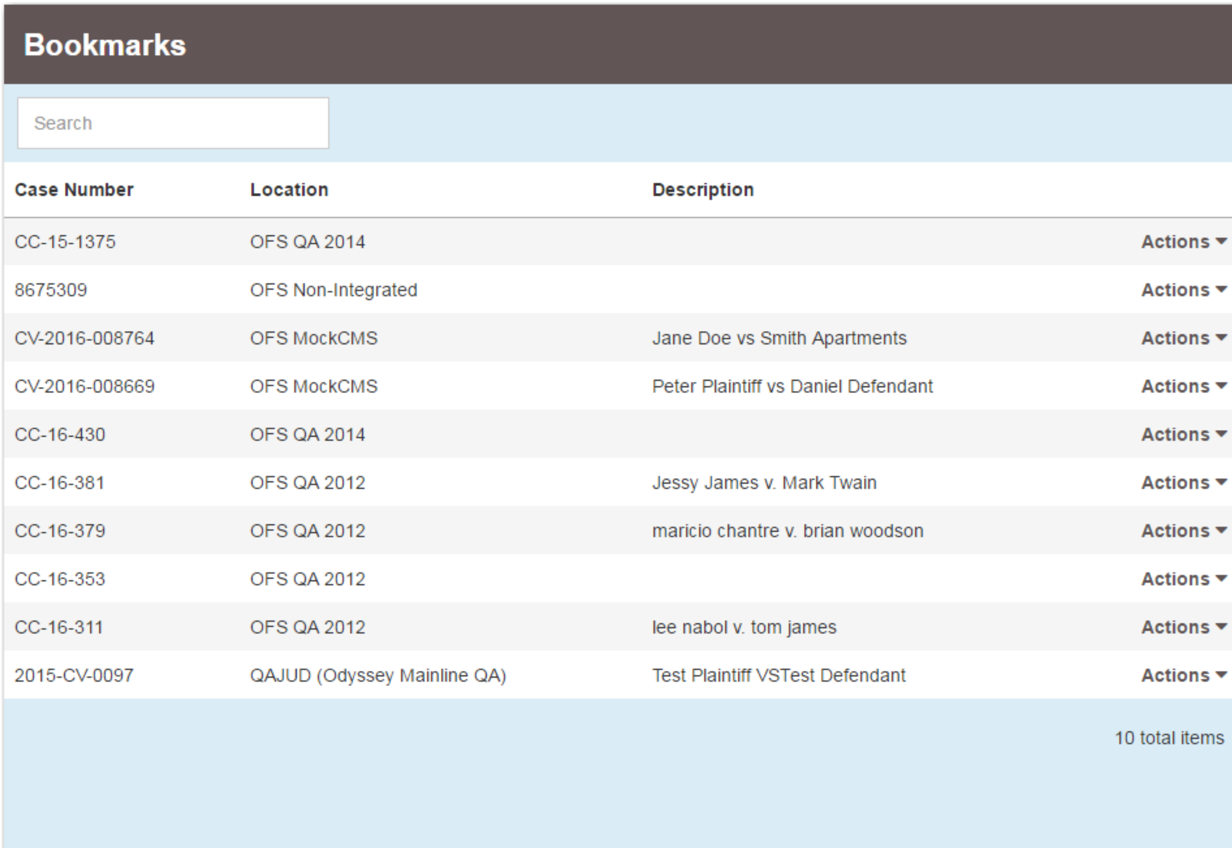


Figure 10.21 – Bookmarks Page

2. Locate the case that you want to file into.
3. From the **Actions** drop-down list for the specified case, select **File Into Case**.

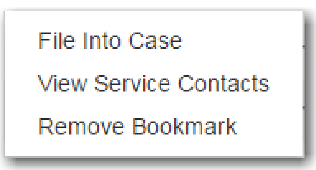


Figure 10.22 – Actions Drop-Down List

The **Case Information** and **Party Information** fields are already populated since this is an existing case. You can immediately view the parties associated with the case.

Figure 10.23 – Case Information and Party Information Sections

4. Complete the filing details in the **Filings** section.

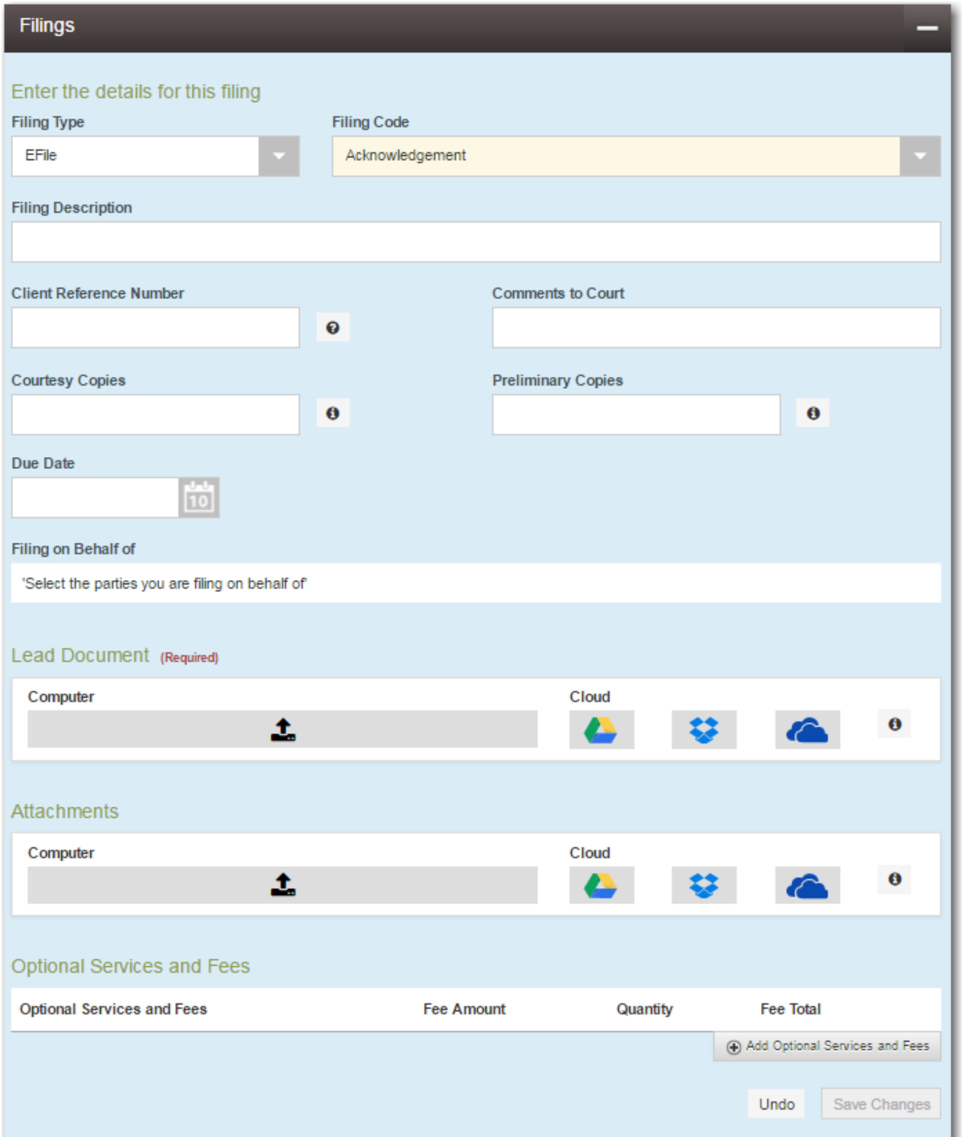


Figure 10.24 – Filings Section

a. Select a filing type from the **Filing Type** drop-down list.

A default filing type can be configured for existing case filings. The default filing type can be set to **EFileAndServe** or just **EFile**.

Note: Serve is not a default option.

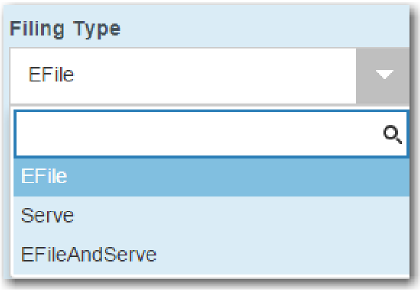


Figure 10.25 – Filing Type Drop-Down List

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

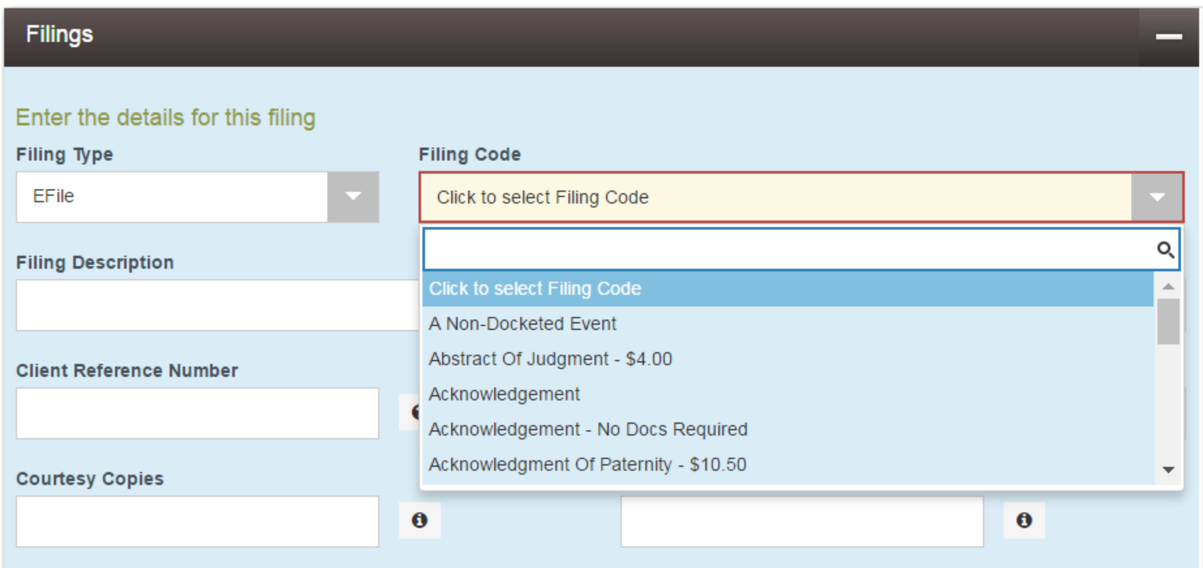


Figure 10.26 – Filing Code Drop-Down List

After you select the filing code, the fee associated with the filing code is displayed.

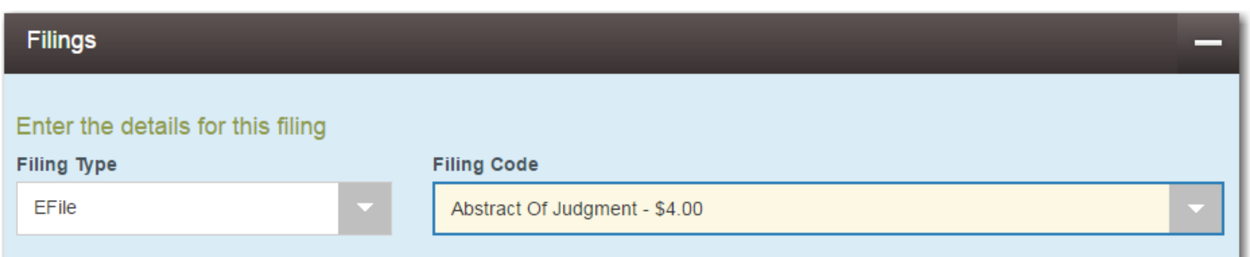


Figure 10.27 – Filing Code Field with the Fee Displayed

c. Type a description of the filing in the **Filing Description** field.

d. Type a client reference number in the **Client Reference Number** field.

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

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

Note: The Due Date field is configured by Tyler and may not be available on your system.

A calendar is displayed from which you can select the specified date.

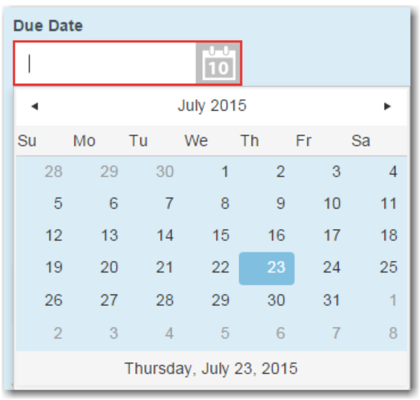


Figure 10.28 – Due Date Calendar

h. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

Note: The filing on behalf of feature is configured by Tyler and may not be available on your system.

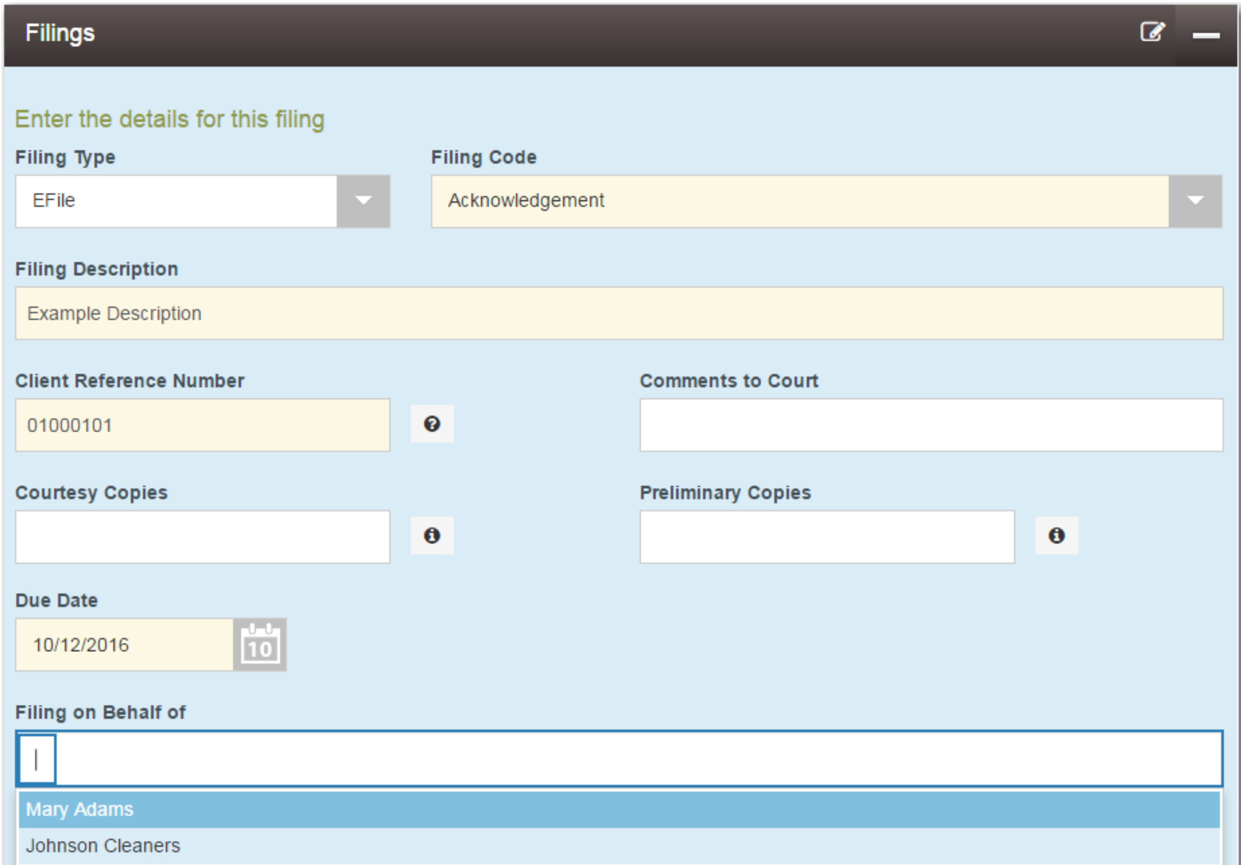


Figure 10.29 – Filing on Behalf of Field in the Filings Section

i. Click the **Lead Document** field to select a lead document to load. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. Only one document can be uploaded as a lead document.

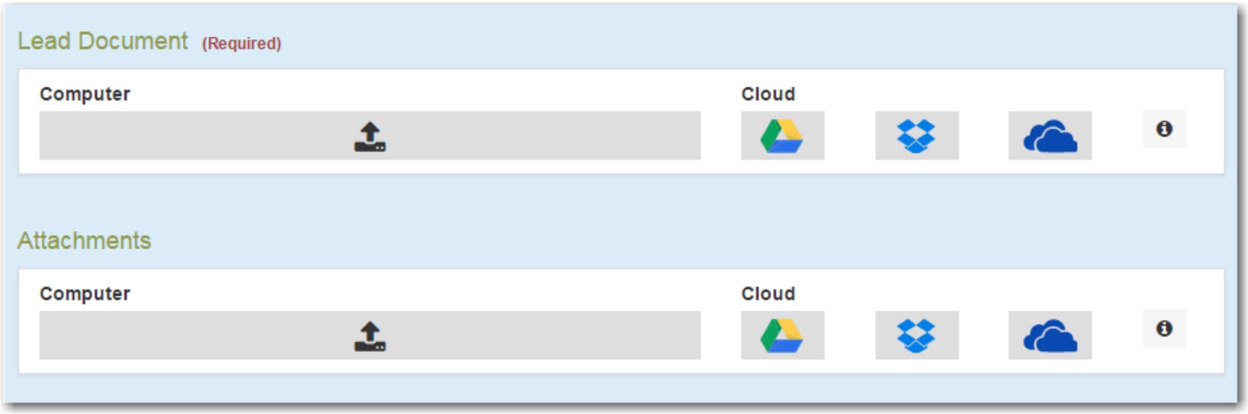


Figure 10.30 – Lead Document and Attachments Fields in the Filings Section

j. Type a name for the lead document in the **Description** field.

Note: A maximum length for the document name can be configured by Tyler at the customer's request. When configured, if a user assigns a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

k. Click the **Security** drop-down list to select the level of security to attach to the document.

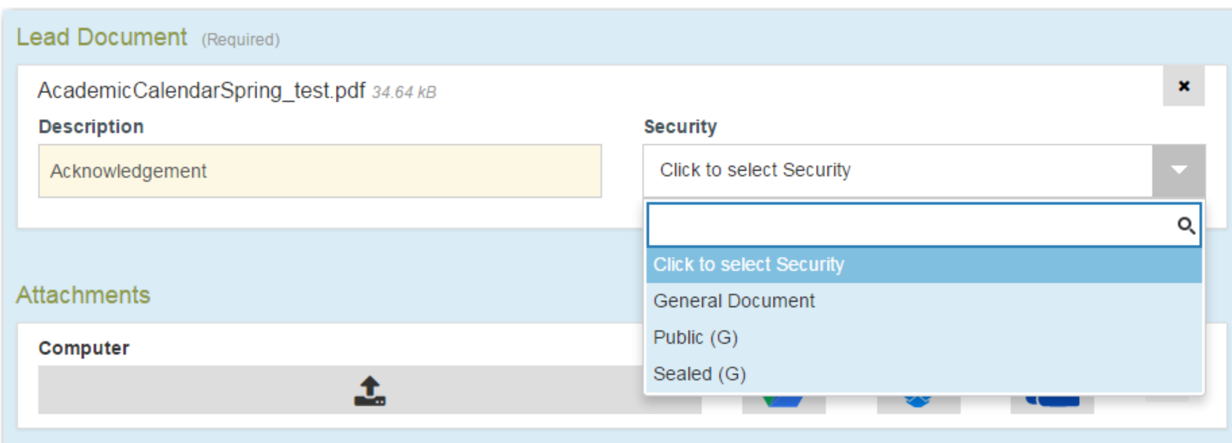


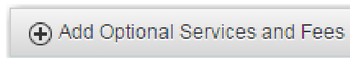
Figure 10.31 – Security Drop-Down List in the Lead Document Section

l. If you have attachments to load, click the **Attachments** field to select the documents to load. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

Figure 10.32 – Optional Services and Fees Section

m. If you want to add an optional service to the filing, click  .

The **Optional Services and Fees** field is displayed.

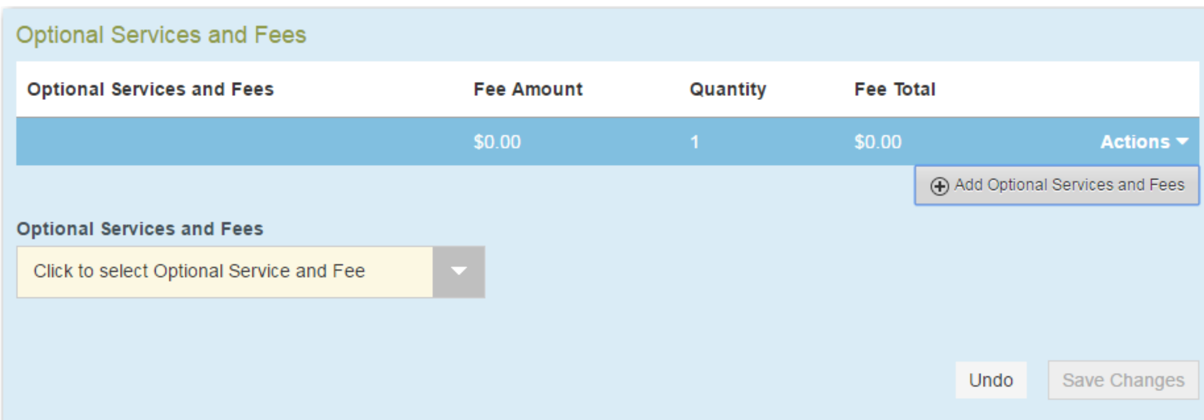


Figure 10.33 – Optional Services and Fees Field in the Optional Services and Fees Section

n. Select a service from the **Optional Services and Fees** drop-down list.

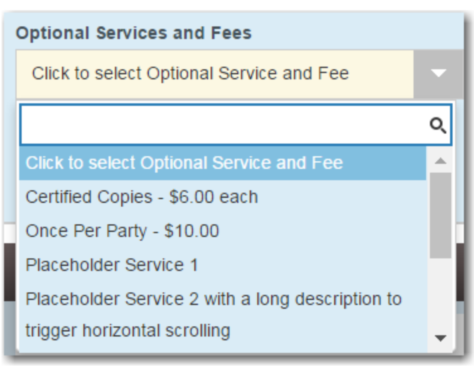


Figure 10.34 – Optional Services and Fees Drop-Down List

The fee associated with the optional service is displayed.

o. When you select the service for certified copies, type the number of copies that you want in the **Enter number of certified copies desired** field.

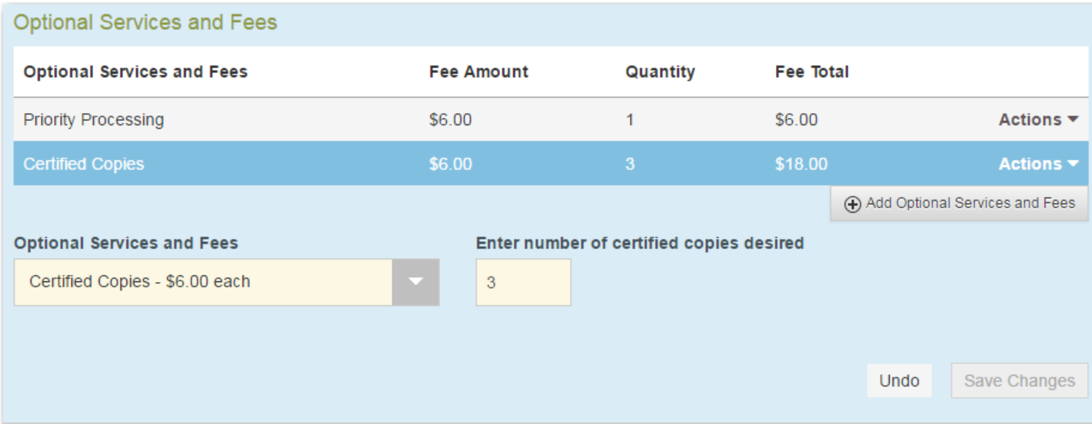


Figure 10.35 – Optional Services and Fees Section with Services Selected

p. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

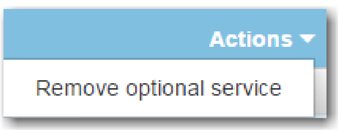


Figure 10.36 – Optional Service Actions Drop-Down List

q. When you are done adding optional services, click Save Changes.

Figure 10.37 – Optional Services and Fees Section with Optional Services Saved

Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

r. Verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

s. Click Save Changes to save your changes, or click Undo to cancel the action.

5. Complete the fields in the **Fees** section.

   Note: Your credit card is authorized when submitted. However, the transaction fees are not posted 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.

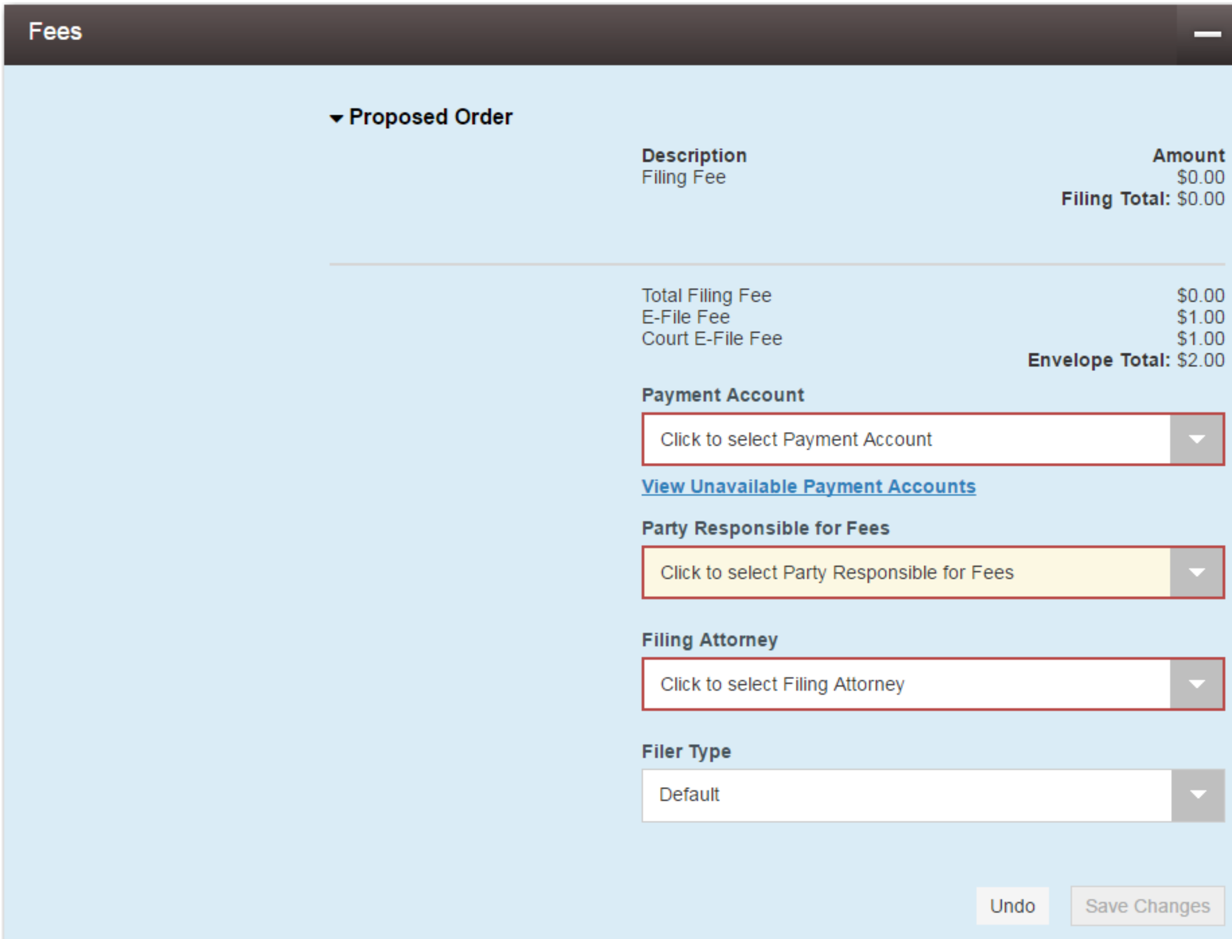


Figure 10.38 – Fees Section

   a. Select a payment account from the **Payment Account** drop-down list.

      Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

   b. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

   c. Select the filing attorney from the **Filing Attorney** drop-down list.

   d. Select the filer type from the **Filer Type** drop-down list.

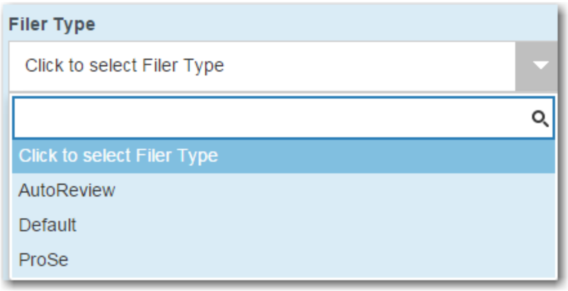


Figure 10.39 – Filer Type Drop-Down List

e. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.

6. After completing the fields in all of the sections on the page, perform one of the following actions:

   - Click **Save as Draft** to stop working on your filing and resume work at a later time. **Note: To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.**
   - Click **Summary** to review a summary of your filing.

7. If you clicked **Summary**, review the filing for accuracy. If you need to make any changes, click **Back** to return to the previous page. Make any necessary corrections, and then click **Summary** again.

8. When you are satisfied with the information in your filing, click **Submit**.

   A new **Envelope** of your filing is included on the *Filing History* page.

Filing into an Existing Case from the Filer Dashboard Page

To file into an existing case from the *Filer Dashboard* page, perform the following steps:

1. On the *Filer Dashboard* page, click **File into Existing Case**.

   Note: You could also click File Into Existing Case from the Actions drop-down list on the *Filer Dashboard* page.

   The *File Into Existing Case* page is displayed.

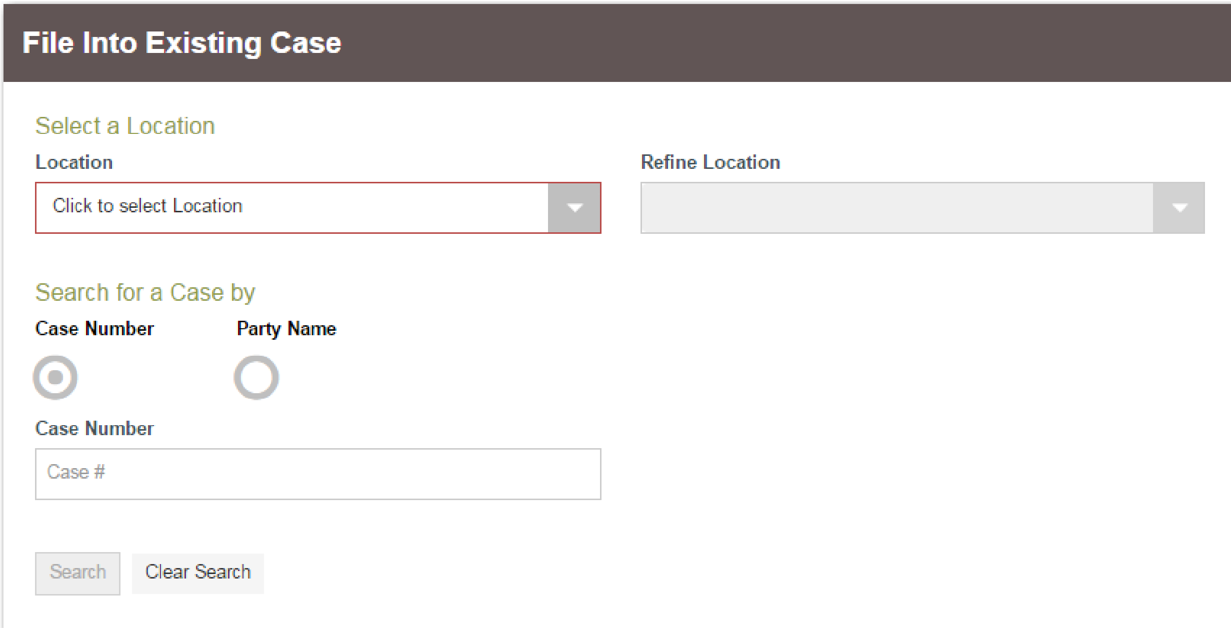


Figure 10.40 – File Into Existing Case Page

2. Select the county or district location from the **Location** drop-down list.
3. Select the specific court from the **Refine Location** drop-down list.

   Note: The items in the list are based on the court that you previously selected.

   Note: The location filtering feature is configured by Tyler and may not be available on your system.

4. Click the search option that you plan to use: **Case Number** or **Party Name**.
5. Enter the search criteria, and then click **Search**.
6. When the correct case is displayed, select **File Into Case** from the **Actions** drop-down list for the specified case.

Figure 10.41 – Actions Drop-Down List

The **Case Information** and **Party Information** fields are already populated since this is an existing case. You can immediately view the parties associated with the case.

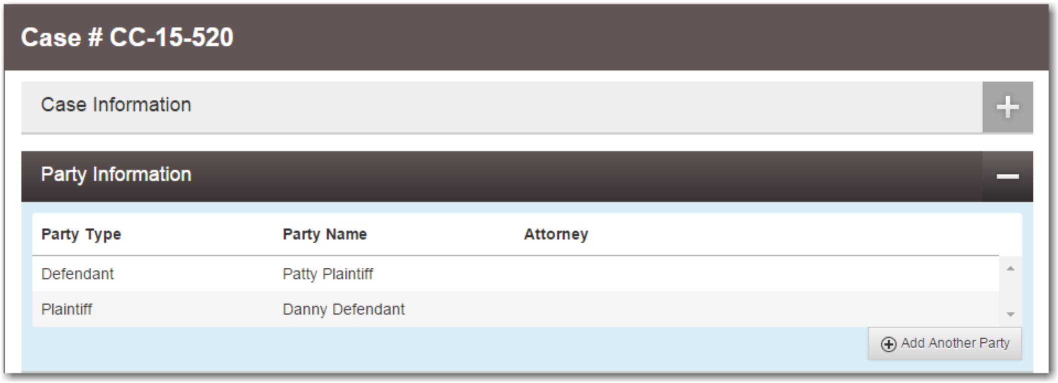


Figure 10.42 – Party Information Section Expanded for Existing Cases

When more than 100 parties are on a case, only the first party of each required type is displayed, along with a message that additional parties could not be displayed due to system constraints. Add additional parties to the case if you want.

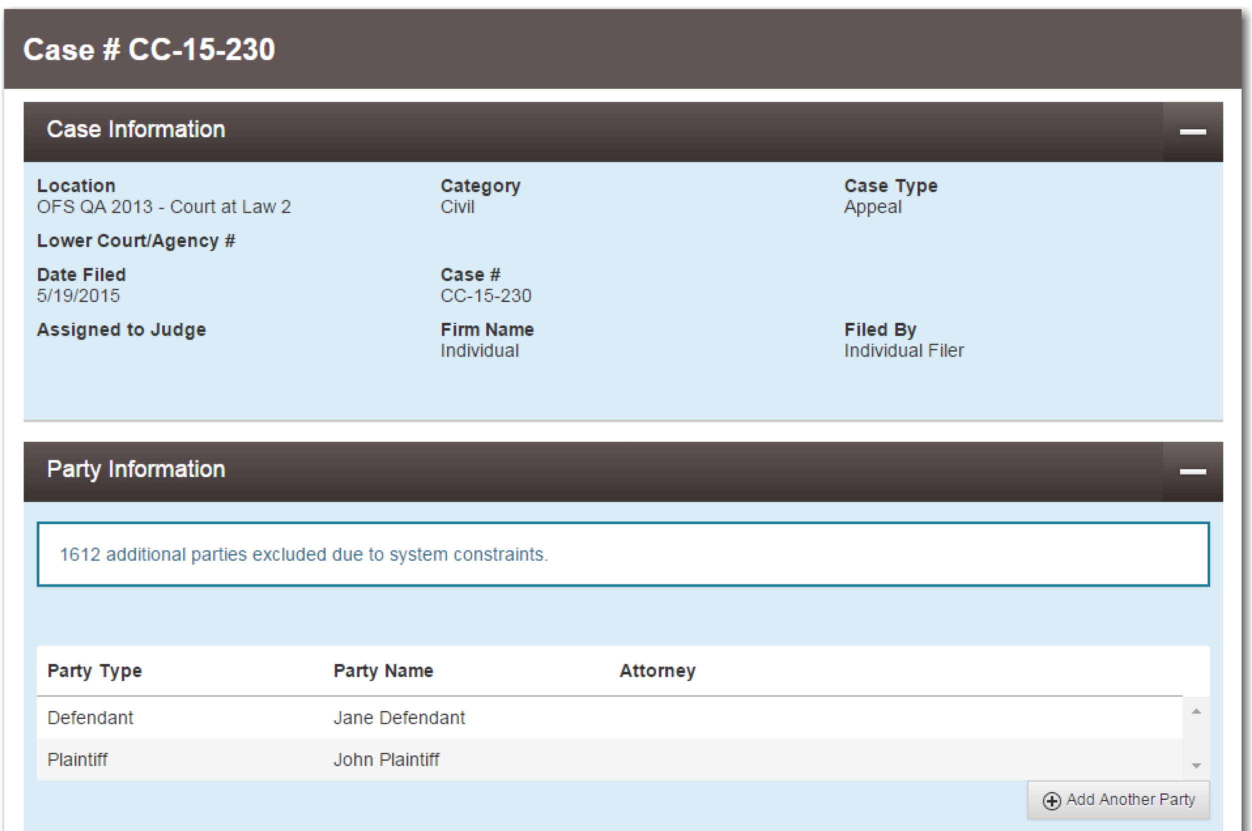


Figure 10.43 – Case Information and Party Information Sections

7. Complete the filing details in the **Filings** section.

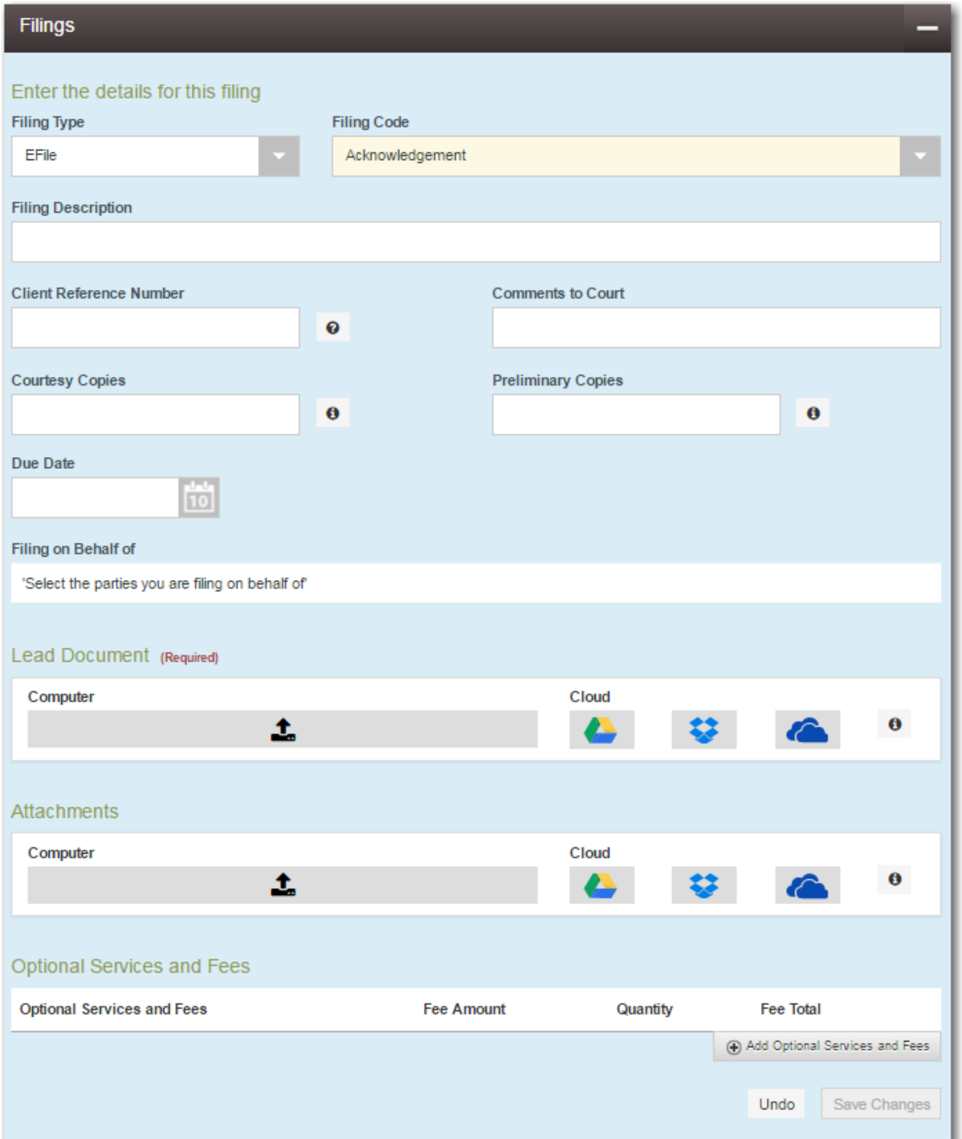


Figure 10.44 – Filings Section

a. Select a filing type from the **Filing Type** drop-down list.

A default filing type can be configured for existing case filings. The default filing type can be set to **EFileAndServe** or just **EFile**.

Note: Serve is not a default option.

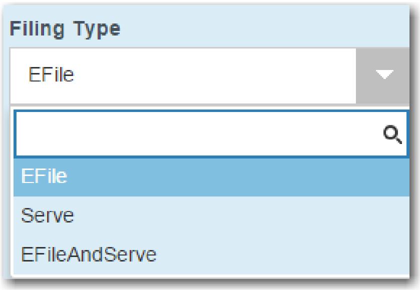


Figure 10.45 – Filing Type Drop-Down List

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

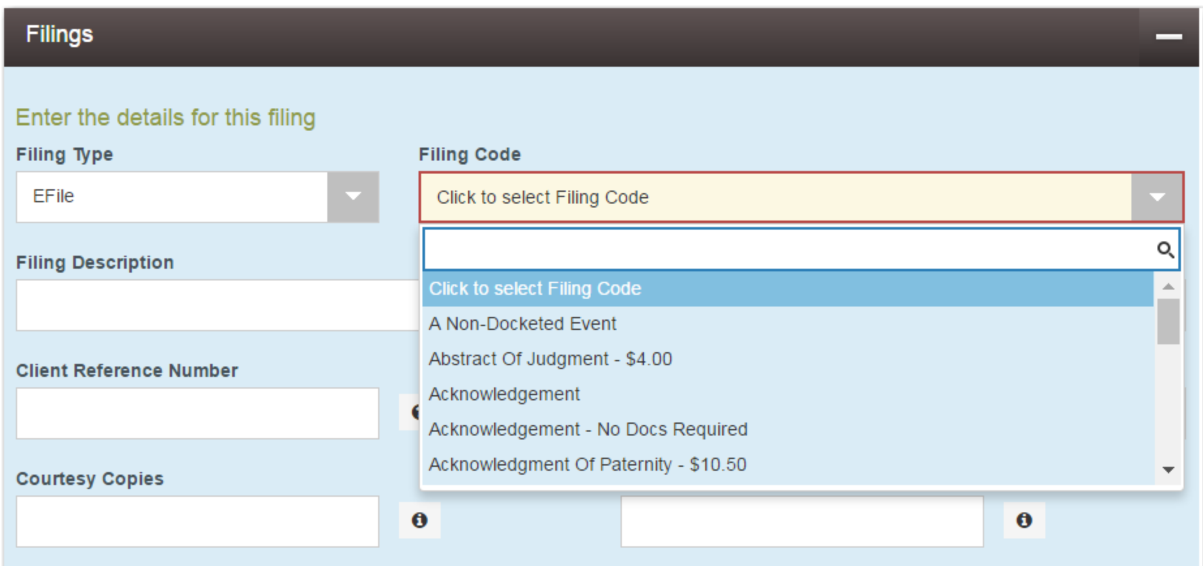


Figure 10.46 – Filing Code Drop-Down List

After you select the filing code, the fee associated with the filing code is displayed.

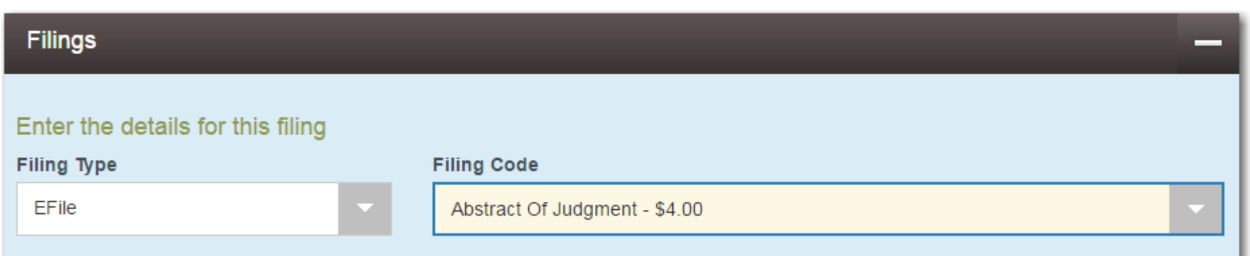


Figure 10.47 – Filing Code Field with the Fee Displayed

c. Type a description of the filing in the **Filing Description** field.

d. Type a client reference number in the **Client Reference Number** field.

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

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

Note: The Due Date field is configured by Tyler and may not be available on your system.

A calendar is displayed from which you can select the specified date.

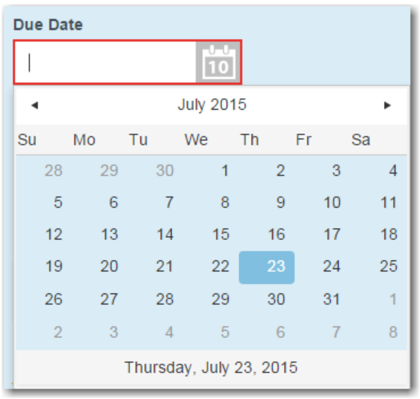


Figure 10.48 – Due Date Calendar

h. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

Note: The filing on behalf of feature is configured by Tyler and may not be available on your system.

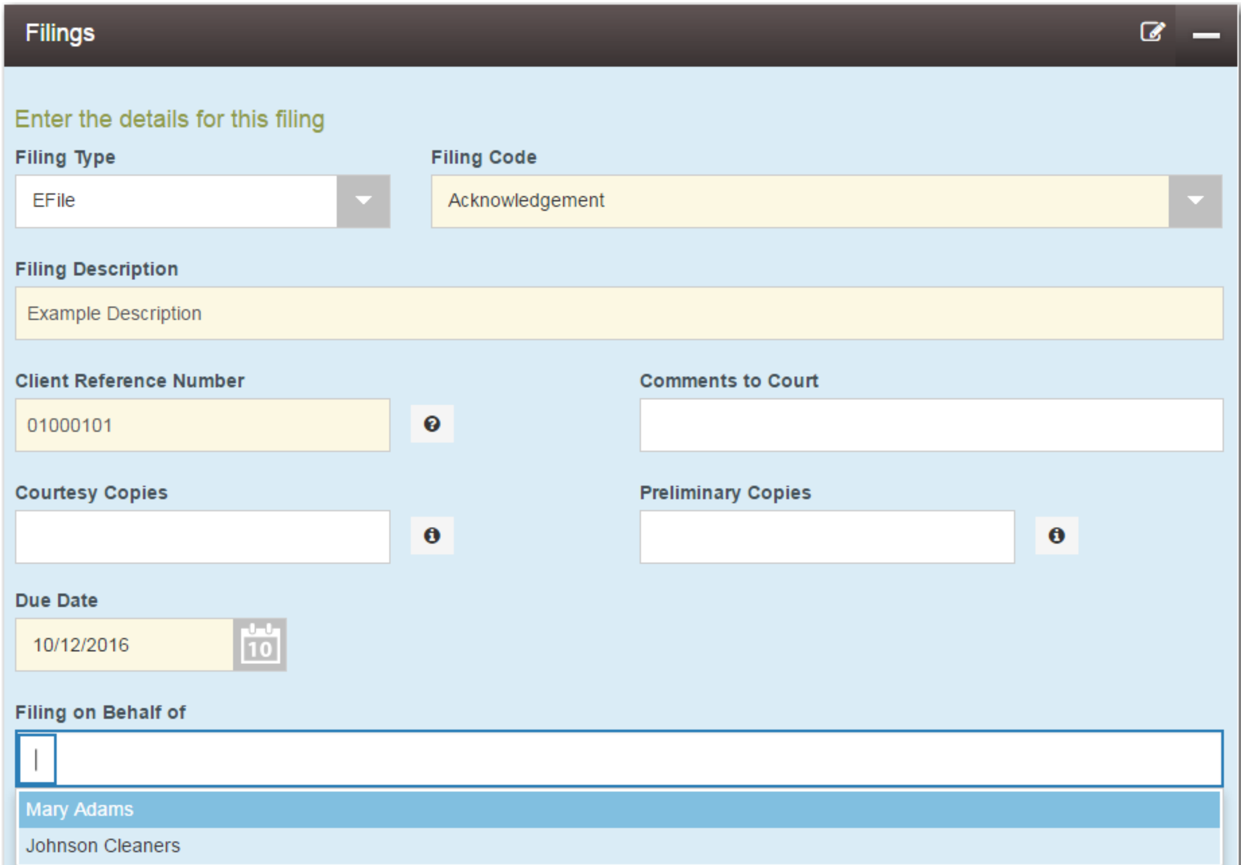


Figure 10.49 – Filing on Behalf of Field in the Filings Section

i. Click the **Lead Document** field to select a lead document to load. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. Only one document can be uploaded as a lead document.

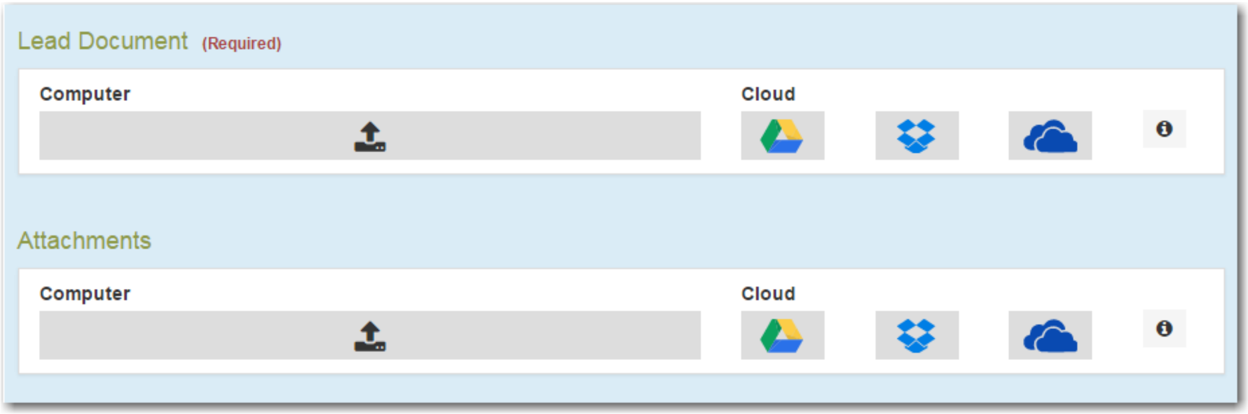


Figure 10.50 – Lead Document and Attachments Fields in the Filings Section

j. Type a name for the lead document in the **Description** field.

Note: A maximum length for the document name can be configured by Tyler at the customer's request. When configured, if a user assigns a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

k. Click the **Security** drop-down list to select the level of security to attach to the document.

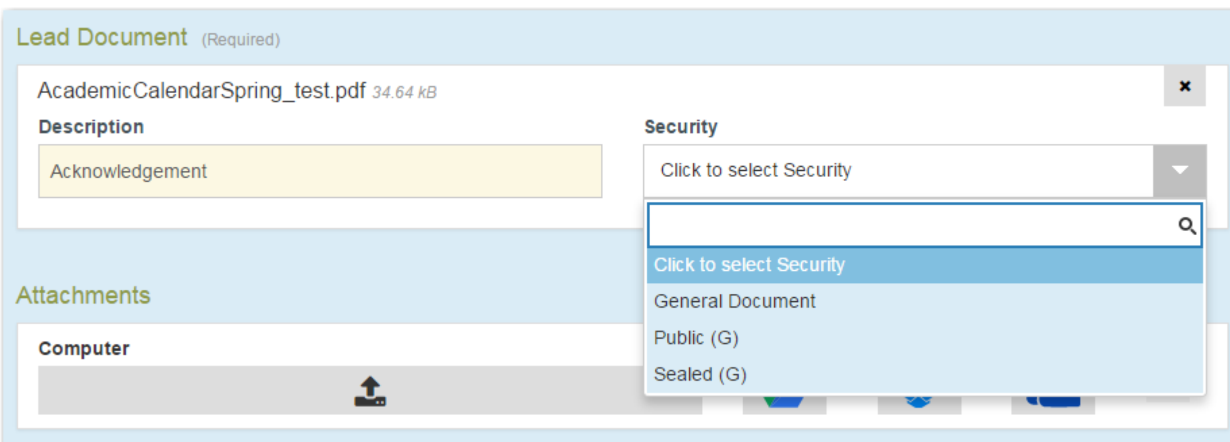


Figure 10.51 – Security Drop-Down List in the Lead Document Section

l. If you have attachments to load, click the **Attachments** field to select the documents to load. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

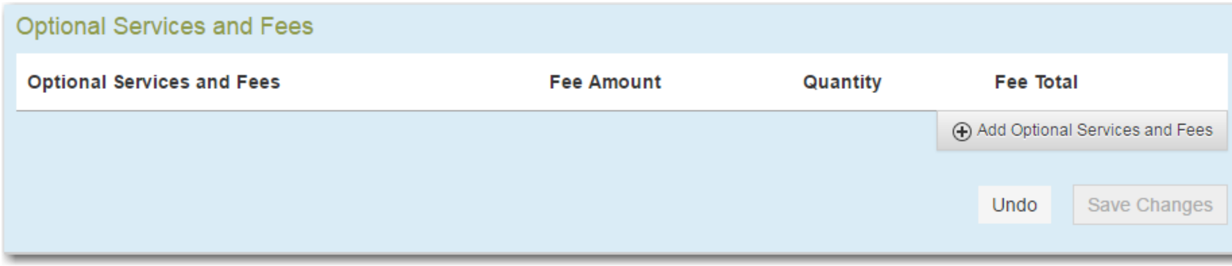
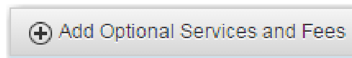


Figure 10.52 – Optional Services and Fees Section

m. If you want to add an optional service to the filing, click  .

The **Optional Services and Fees** field is displayed.

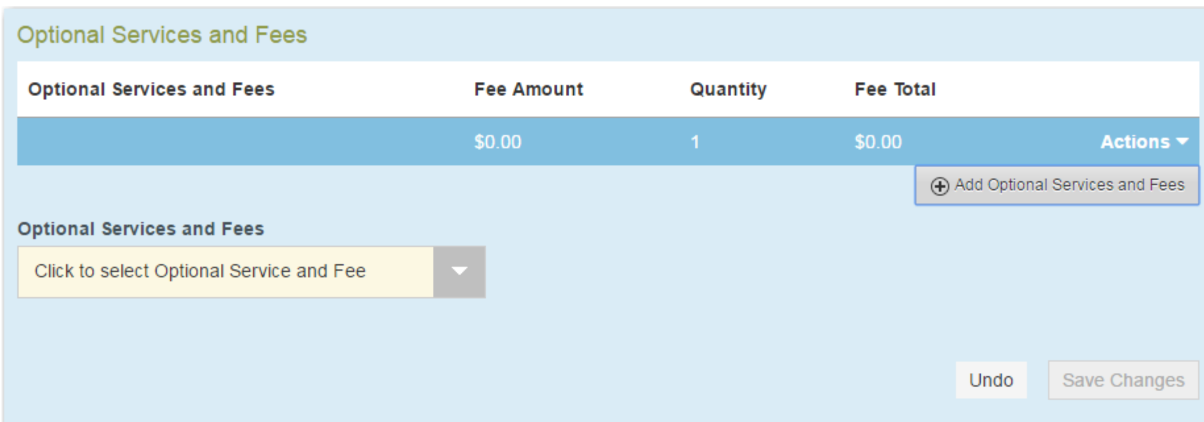


Figure 10.53 – Optional Services and Fees Field in the Optional Services and Fees Section

n. Select a service from the **Optional Services and Fees** drop-down list.

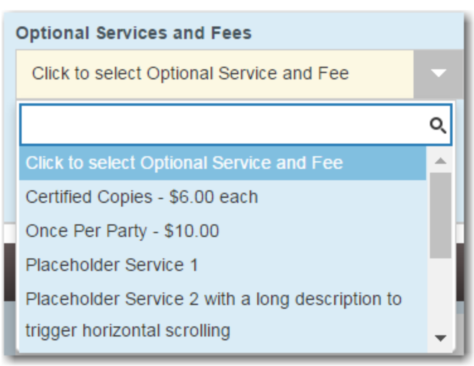


Figure 10.54 – Optional Services and Fees Drop-Down List

The fee associated with the optional service is displayed.

o. When you select the service for certified copies, type the number of copies that you want in the **Enter number of certified copies desired** field.

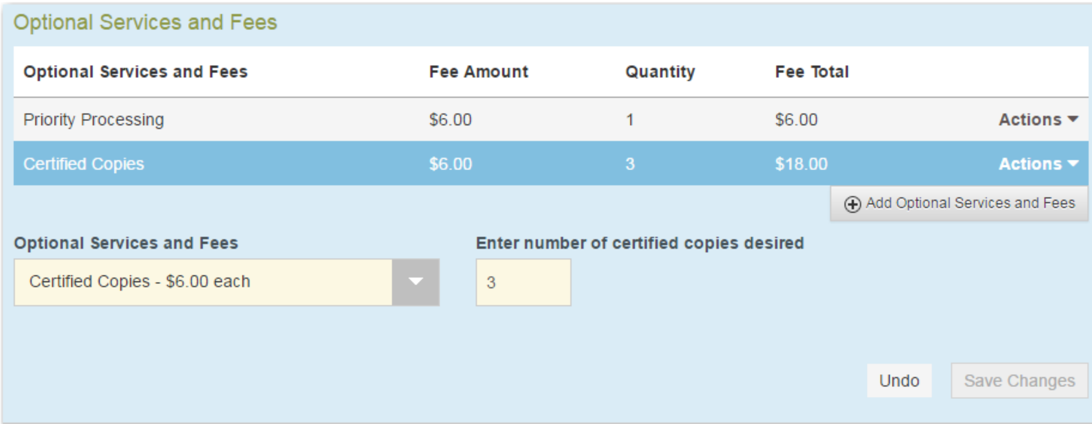


Figure 10.55 – Optional Services and Fees Section with Services Selected

p. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

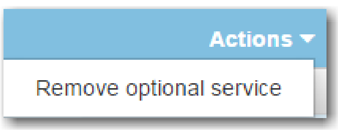


Figure 10.56 – Optional Service Actions Drop-Down List

q. When you are done adding optional services, click Save Changes.

Figure 10.57 – Optional Services and Fees Section with Optional Services Saved

Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

r. Verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

s. Click Save Changes to save your changes, or click Undo to cancel the action.

8. Complete the fields in the **Fees** section.

   Note: Your credit card is authorized when submitted. However, the transaction fees are not posted 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.

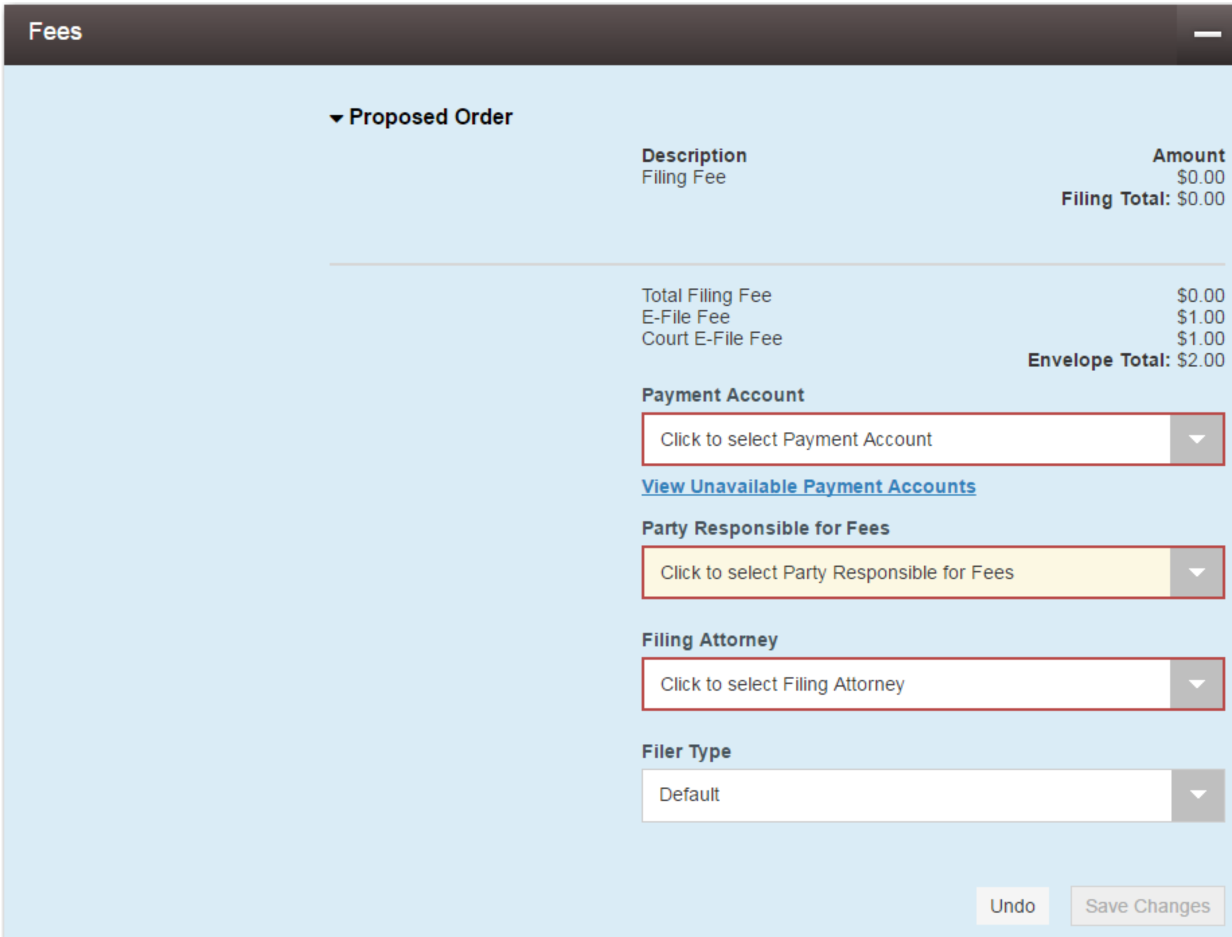


Figure 10.58 – Fees Section

   a. Select a payment account from the **Payment Account** drop-down list.

      Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

   b. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

   c. Select the filing attorney from the **Filing Attorney** drop-down list.

   d. Select the filer type from the **Filer Type** drop-down list.

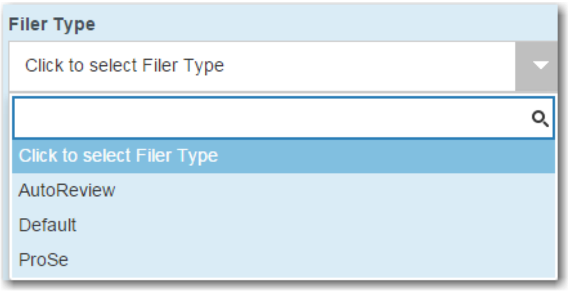


Figure 10.59 – Filer Type Drop-Down List

e. Click Save Changes to save your changes, or click Undo to cancel the action.

9. After completing the fields in all of the sections on the page, perform one of the following actions:

   - Click Save as Draft to stop working on your filing and resume work at a later time. **Note: To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.**
   - Click Summary to review a summary of your filing.

10. If you clicked Summary, review the filing for accuracy. If you need to make any changes, click Back to return to the previous page. Make any necessary corrections, and then click Summary again.

11. When you are satisfied with the information in your filing, click Submit.

    A new **Envelope** of your filing is included on the *Filing History* page.

Creating a Service Only Filing

To create a Service Only filing, perform the following steps:

1. Select an existing case that you want to file into.
2. Follow one of the methods for filing into an existing case (i.e., from the *Filing History* page, from the *Bookmarks* page, by clicking **File into Existing Case** in the **New Filing** section on the *Filer Dashboard* page, or from the **Actions** drop-down list on the *Filer Dashboard* page).

   Note: The Case Information and Party Information fields are already populated since this is an existing case.
3. Navigate to the **Filings** section. Select **Serve** in the **Filing Type** field.

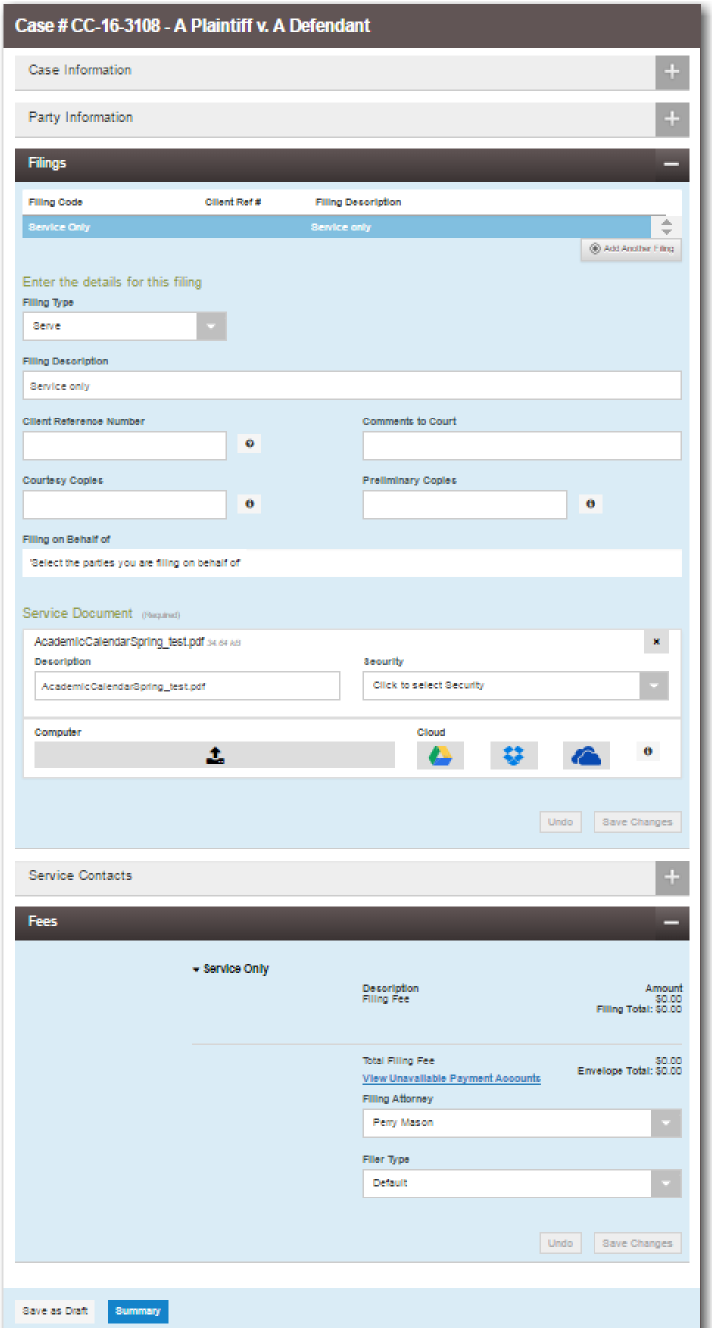


Figure 10.60 – Case Page

4. Click the **Service Document** field to select a service document to load. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

   Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

   Note: The Service Document field is required.

5. Click Save Changes.
6. Add the service contacts that you want to receive a Service Only filing in the **Service Contacts** section.
7. If applicable, select the payment account from the **Payment Account** drop-down list.
8. If applicable, select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.
9. Select the filing attorney from the **Filing Attorney** drop-down list.
10. Select the filer type from the **Filer Type** drop-down list.
11. Select the check box for the appropriate submission agreement in the **Submission Agreements** section.

    Note: Submission agreements are configured by Tyler and may not be available on your system.

12. Click Save as Draft to stop working on your filing and resume work at a later time, or click Summary to review a summary of your filing.

Filing an Appeal to an Existing Case

Note: The Appellate option is configured by Tyler and may not be available on your system.

Perform the following steps to file an appeal to an existing case using the Appellate option:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

    Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

    The *Start a New Case* page is displayed.
2. Complete the details for the appeal by using the drop-down lists in the required fields in the **Case Information** section:

    Note: A red box around a field indicates that it is required.

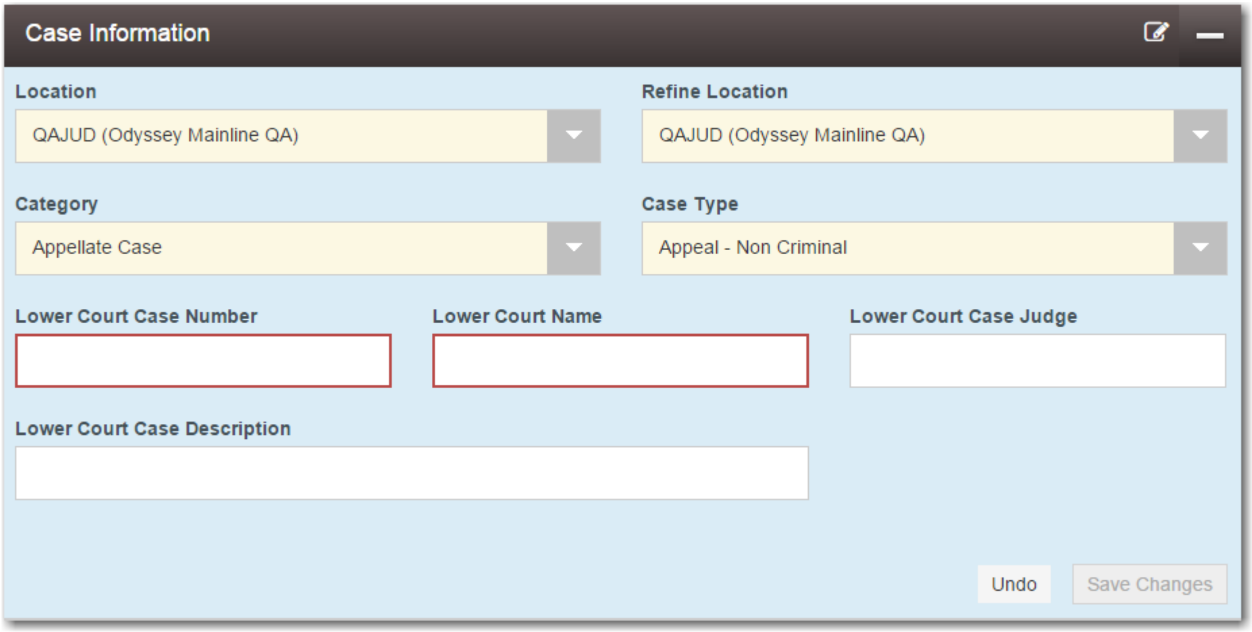


Figure 10.61 – Appellate Selections in the Case Information Section

a. Select your court location from the **Location** drop-down list.

Note: The court location is generally the county or district court where you will be doing the filing.

b. Select the specific court from the **Refine Location** drop-down list.

Note: The location filtering feature is configured by Tyler and may not be available on your system.

Note: The items in this list are limited to only the courts in the county or district that you previously selected.

c. Select **Appellate Case** from the **Category** drop-down list.

d. Select the case type from the **Case Type** drop-down list.

e. Type the original case number in the **Lower Court Case Number** field.

f. Type the name of the lower court in the **Lower Court Name** field.

g. Type the name of the lower court case judge in the **Lower Court Case Judge** field.

h. Type a description of the original case in the **Lower Court Case Description** field.

3. After completing the required fields, click Save Changes.

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

Chapter 11 Service Contacts

Topics Covered in This Chapter

♦ Adding Service Contacts to the Firm
♦ Adding Service Contacts to a Case
♦ Replacing a Firm Service Contact
♦ Default State of Service Contacts
♦ Public Service Contacts
♦ Adding Firm Service Contacts from a Public List
♦ Create New Service Contacts During a Filing
♦ Selecting the Service Method for Service Contacts
♦ Viewing Attached Case List of Firm Service Contacts
♦ Linking a Service Contact to Another Party
♦ Search and Paging Capability for Firm Service Contacts
♦ Removing a Service Contact from a Case
♦ Deleting a Service Contact from the Firm

You can view the current service contacts and add service contacts to your firm.

Adding Service Contacts to the Firm

You can add service contacts to the list of contacts associated with your firm.

To add a service contact to your firm, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, click **Firm Service Contacts**.

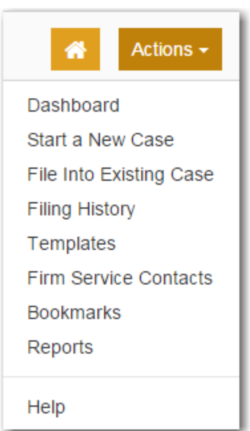


Figure 11.1 – Actions Drop-Down List

The *Firm Service Contacts* page is displayed.

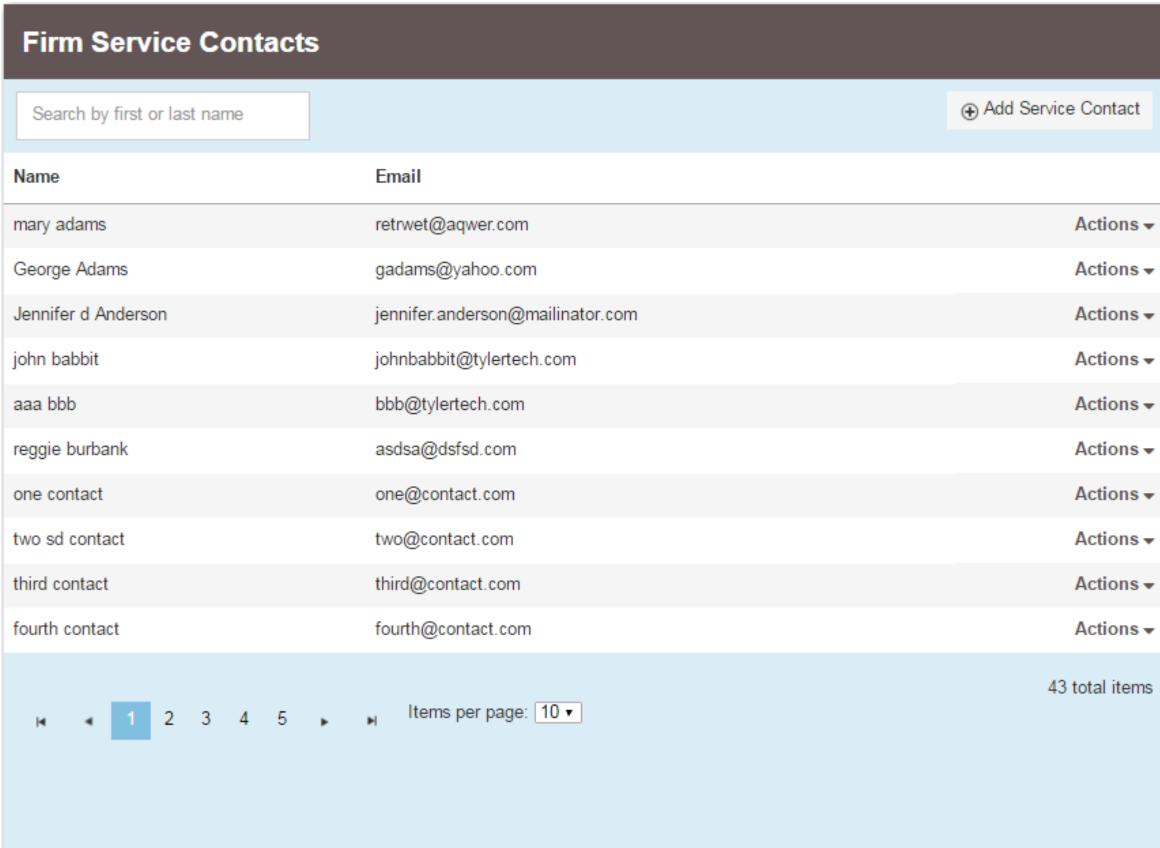
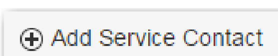


Figure 11.2 – Firm Service Contacts Page

2. Click 

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   The *Firm Service Contacts* page for adding a new contact is displayed.

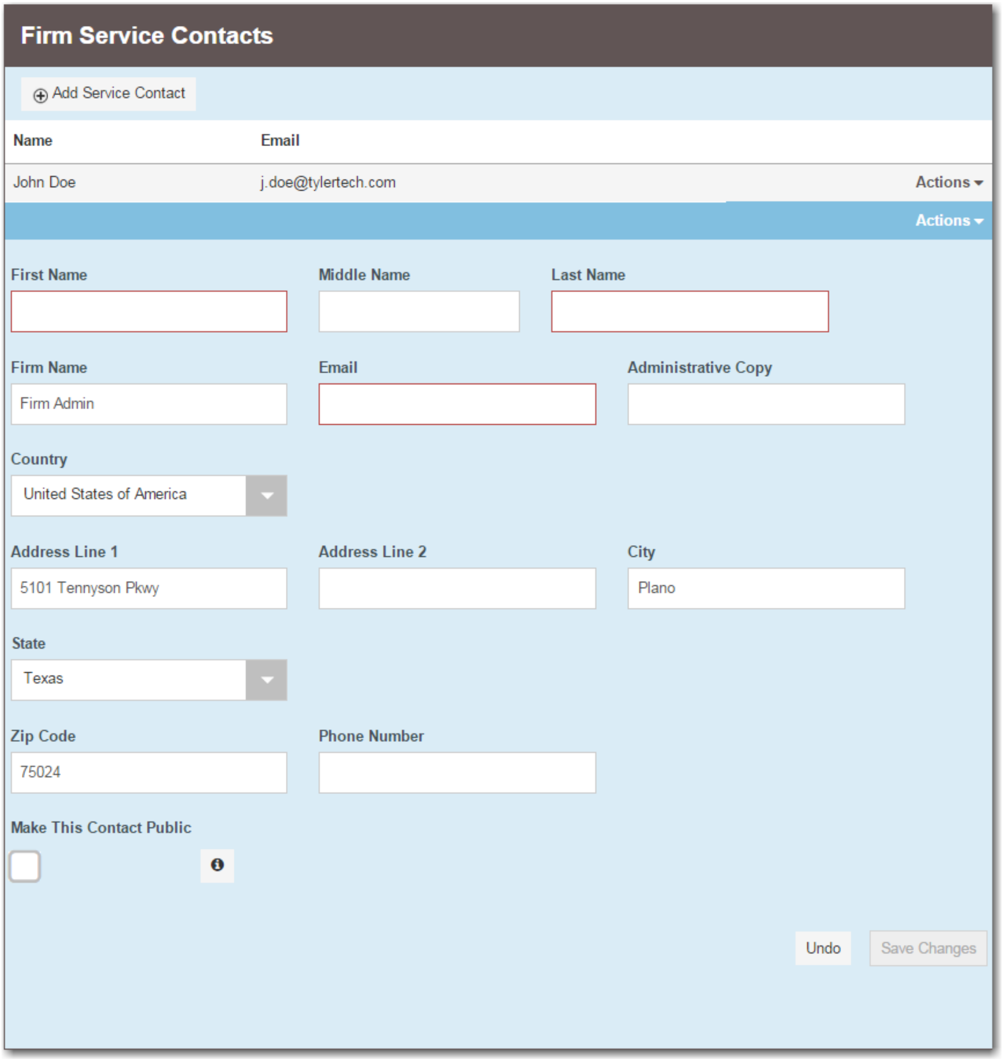


Figure 11.3 – Firm Service Contacts Page for Adding a New Contact

3. Complete the required fields to add the new service contact: **First Name**, **Last Name**, and **Email**.
4. If you want to make the contact available to any filer, select the **Make This Contact Public** check box.
5. Click Save Changes to save the contact, or click Undo to cancel the action.

   If you click Save Changes, the new contact information is displayed in the **Firm Service Contacts** list.

Adding Service Contacts to a Case

To add a service contact to a case, perform the following steps:

1. From the *Filing History* page, locate the case to which you want to add a service contact. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

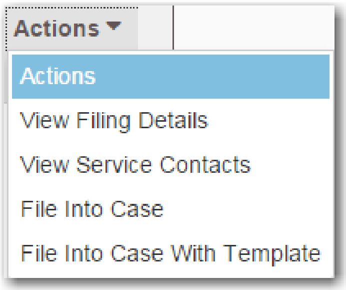


Figure 11.4 – Actions Drop-Down List

The *Service Contacts* page is displayed.

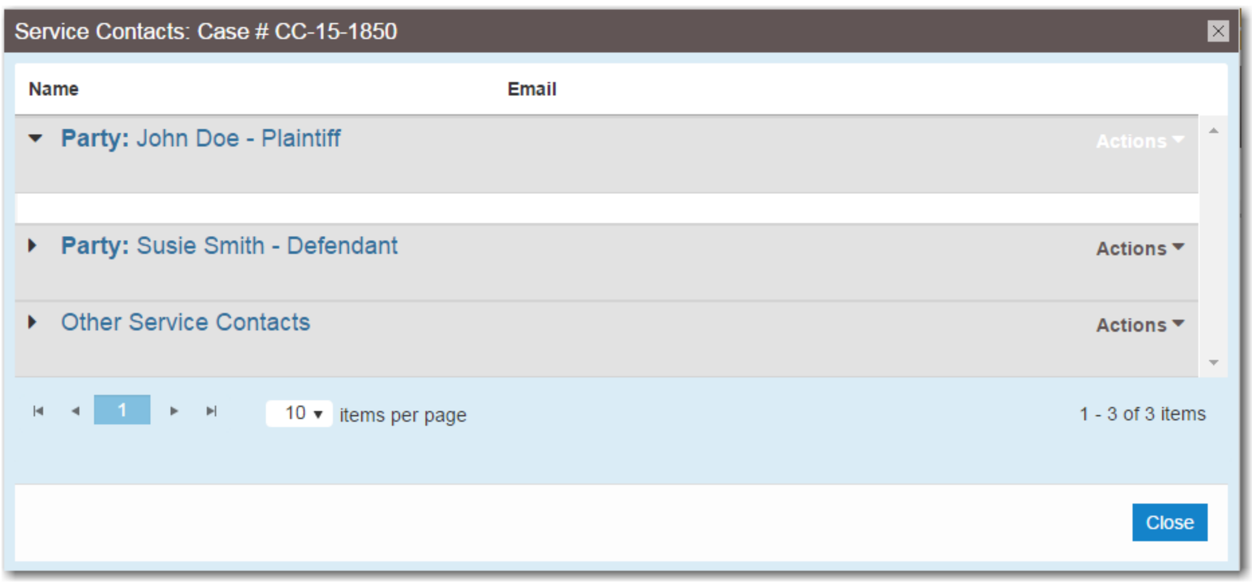


Figure 11.5 – Service Contacts Page

2. Locate the party to which you want to add a service contact. From the **Actions** drop-down list for the specified party, select **Add From Firm Service Contacts**.

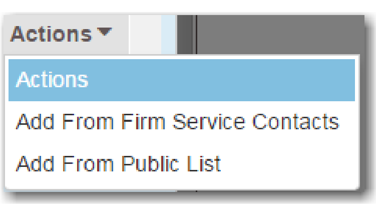


Figure 11.6 – Service Contacts Actions Drop-Down List

The *Add From Firm Service Contacts* dialog box is displayed.

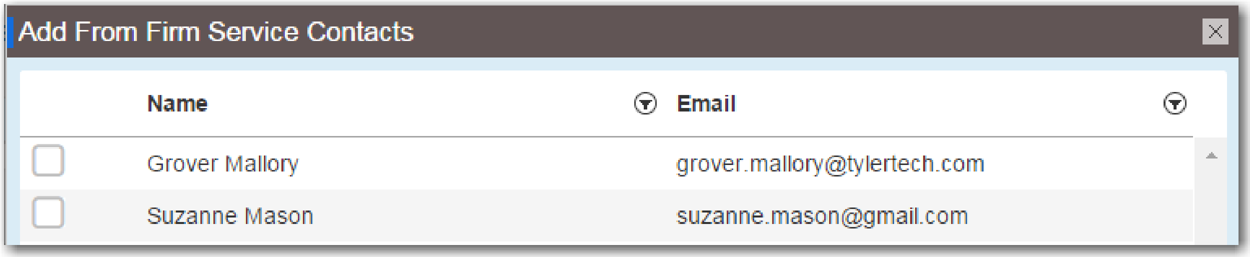


Figure 11.7 – Add From Firm Service Contacts Dialog Box

3. Select the check box next to the service contacts that you want to add to the case.
4. After selecting the new service contacts, click 

.

   The new service contacts are now displayed on the *Service Contacts* page under the party to which the service contact has been added.

5. Click 

to return to the *Filing History* page.

Replacing a Firm Service Contact

To replace a service contact, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Firm Service Contacts**.

   The *Firm Service Contacts* page is displayed.

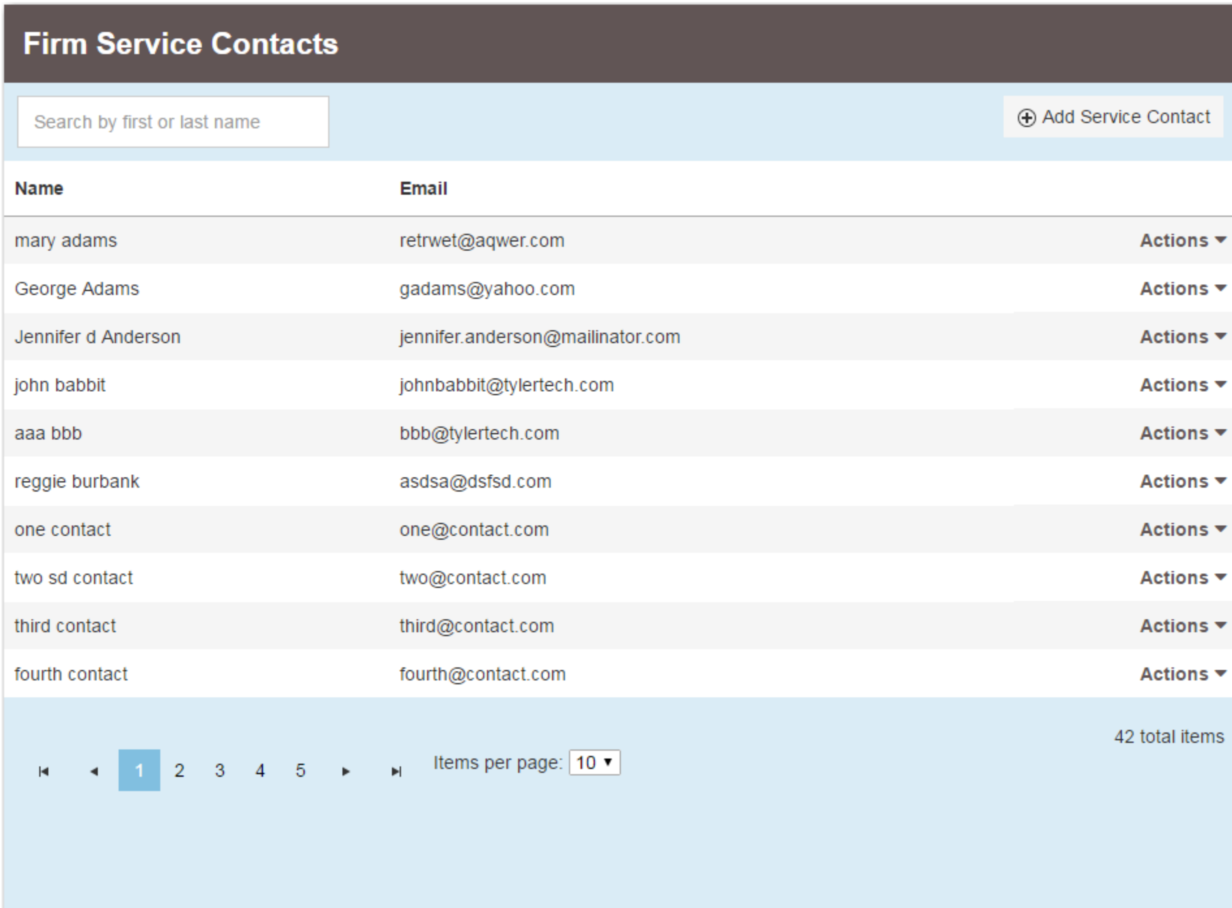


Figure 11.8 – Firm Service Contacts Page

2. Locate the service contact that you want to replace.
3. From the **Actions** drop-down list for the specified service contact, select **Replace Contact**.

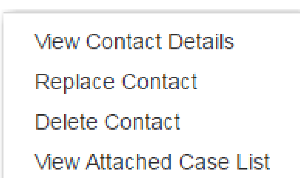


Figure 11.9 – Service Contacts Actions Drop-Down List

The *Replace Service Contact* dialog box is displayed.

Note: A warning message is displayed, which indicates the number of cases to which the service contact is attached. The warning message also reminds you that replacing a service contact cannot be undone.

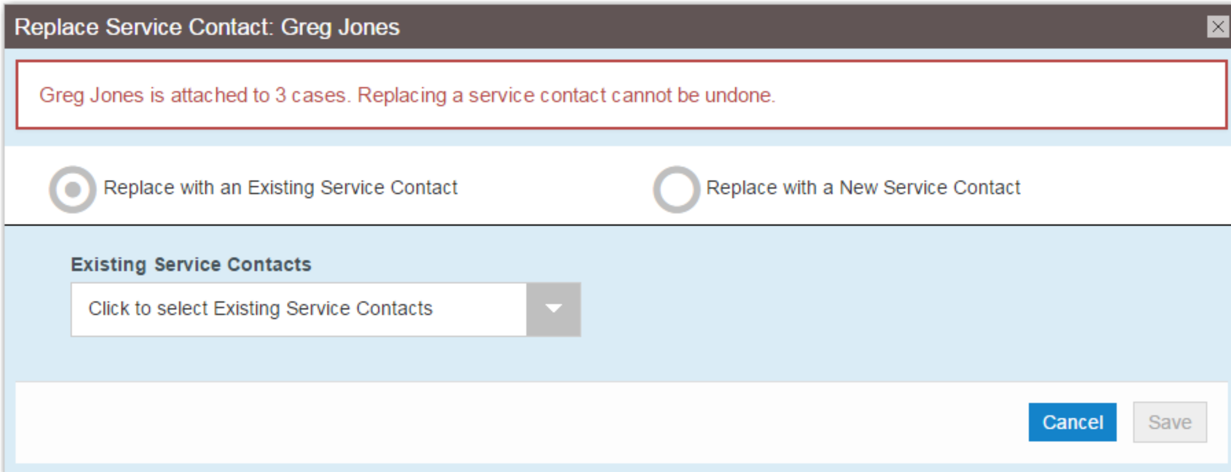


Figure 11.10 – Replace Service Contact Dialog Box

4. If you want to continue to replace the specified service contact, select one of the following methods to replace the service contact.
    - To replace the service contact with an existing contact, select the **Replace with an Existing Service Contact** option. Then select a replacement service contact from the **Existing Service Contacts** drop-down list. Click Save .

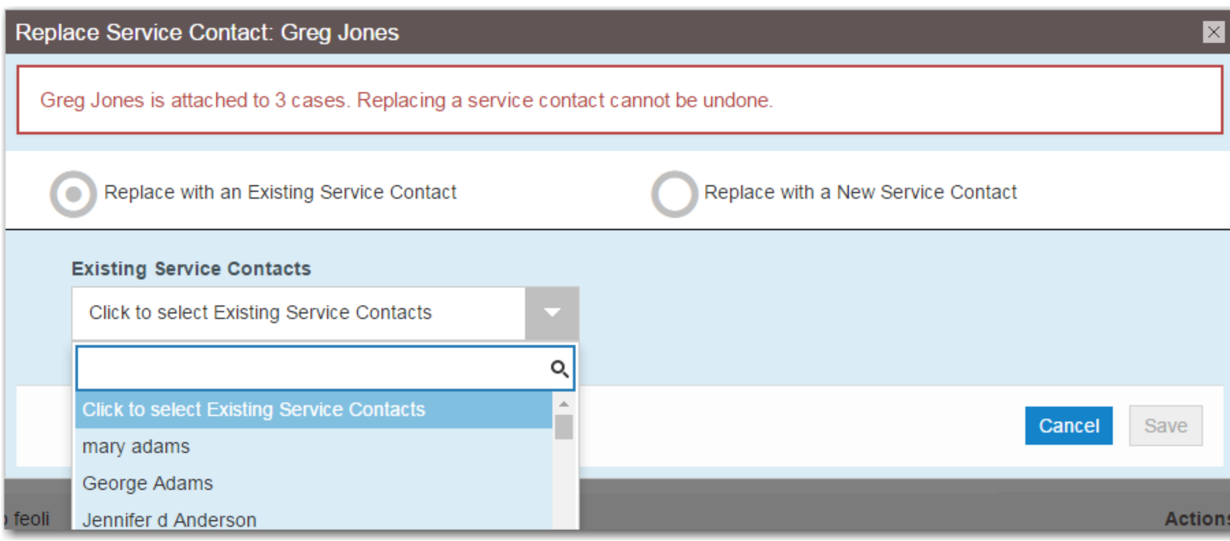


Figure 11.11 – Replace Service Contact Dialog Box with Existing Service Contacts Drop-Down List

    - To replace the service contact with a new contact, select the **Replace with a New Service Contact** option. The dialog box expands with fields to complete for the new contact. Complete the fields, and click Save Changes .

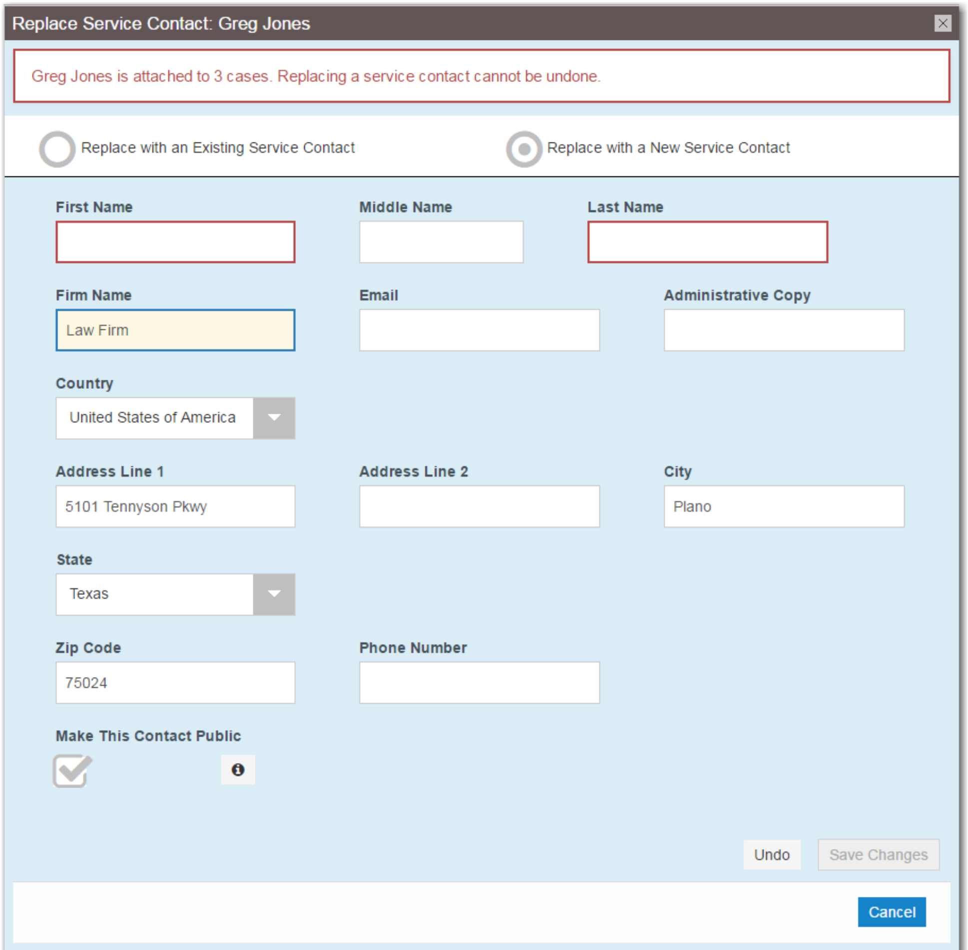


Figure 11.12 – Replace Service Contact Dialog Box for Adding New Service Contact

> **Note: You can make the service contact a public contact by selecting the Make This Contact Public check box.**

Default State of Service Contacts

During filing creation, the system default is for all service contacts to be selected for Service Only and EFileAndServe filings. You can deselect the service contacts that are not needed for that filing. This feature shortens your filing time, especially if you have dozens of service contacts associated with a case.

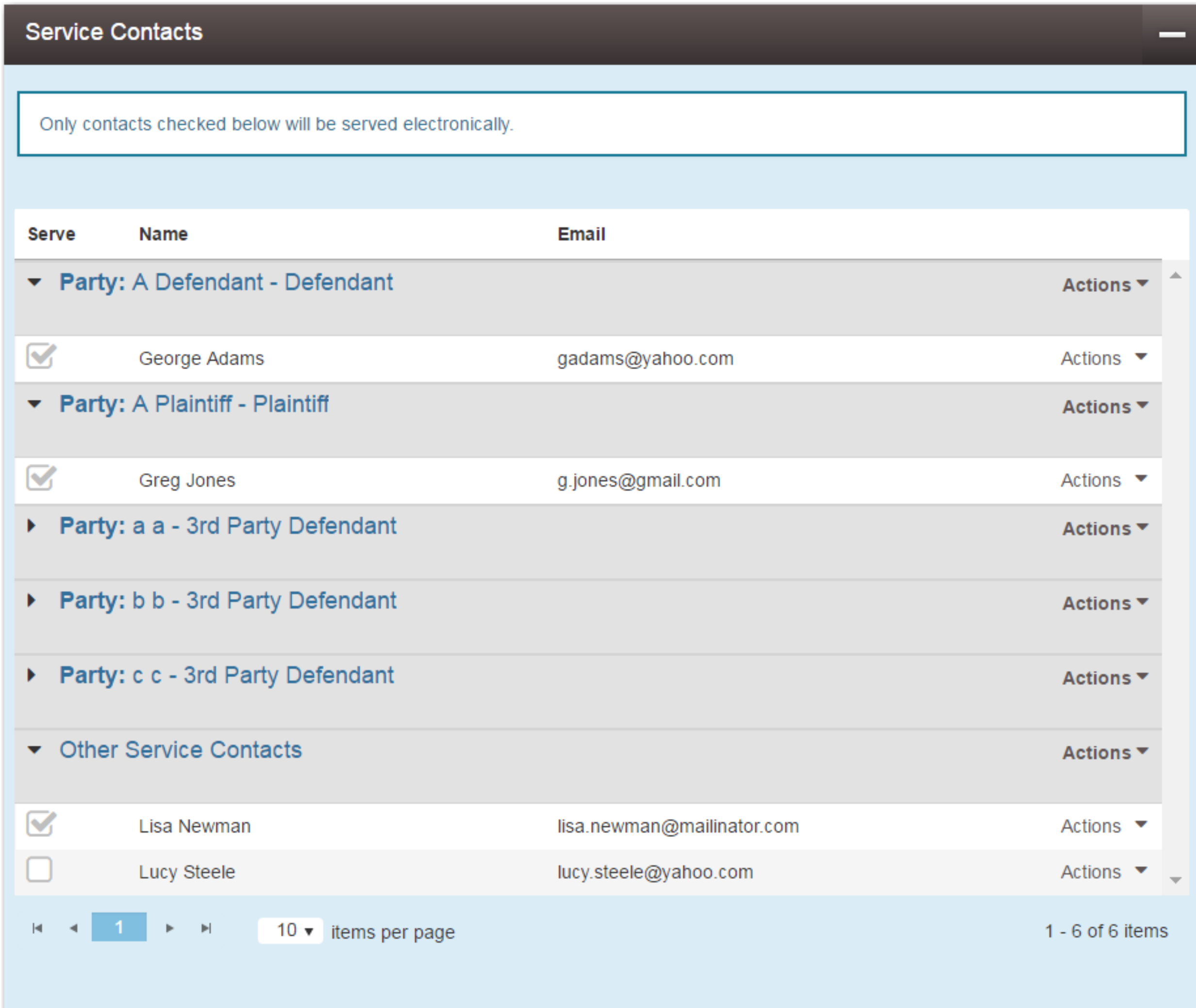


Figure 11.13 – Service Contacts Selected by Default (With One Contact Deselected)

Public Service Contacts

When a service contact is created and associated with a case, it can be designated as a public service contact. When specified as public, the service contact can then be used by anyone outside your firm.

Note: The public service contacts feature is configured by Tyler and may not be available on your system.

In addition, you can add service contacts from a public list to a case that you are starting or filing into.

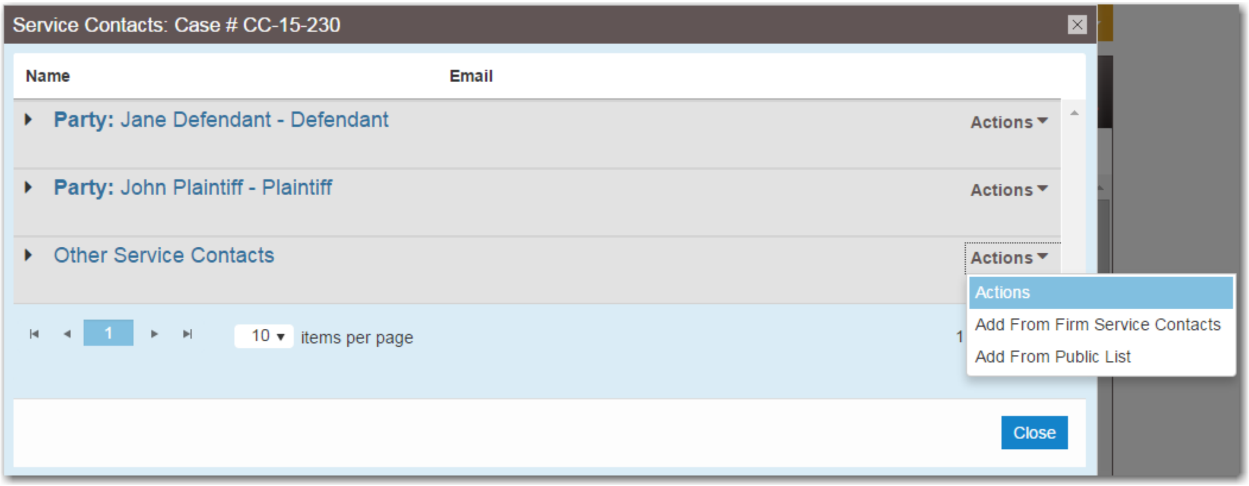


Figure 11.14 – Service Contacts Page

ADDING FIRM SERVICE CONTACTS FROM A PUBLIC LIST

Note: The public service contacts feature is configured by Tyler and may not be available on your system.

To add a firm service contact from a public list, perform the following steps:

1. From the *Filing History* page, locate the case to which you want to add a public service contact. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

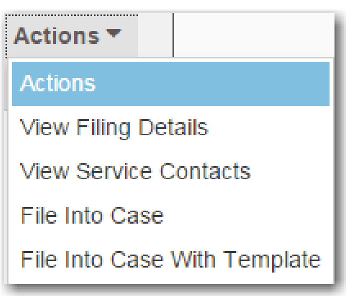


Figure 11.15 – Actions Drop-Down List

The *Service Contacts* page for the specified case is displayed.

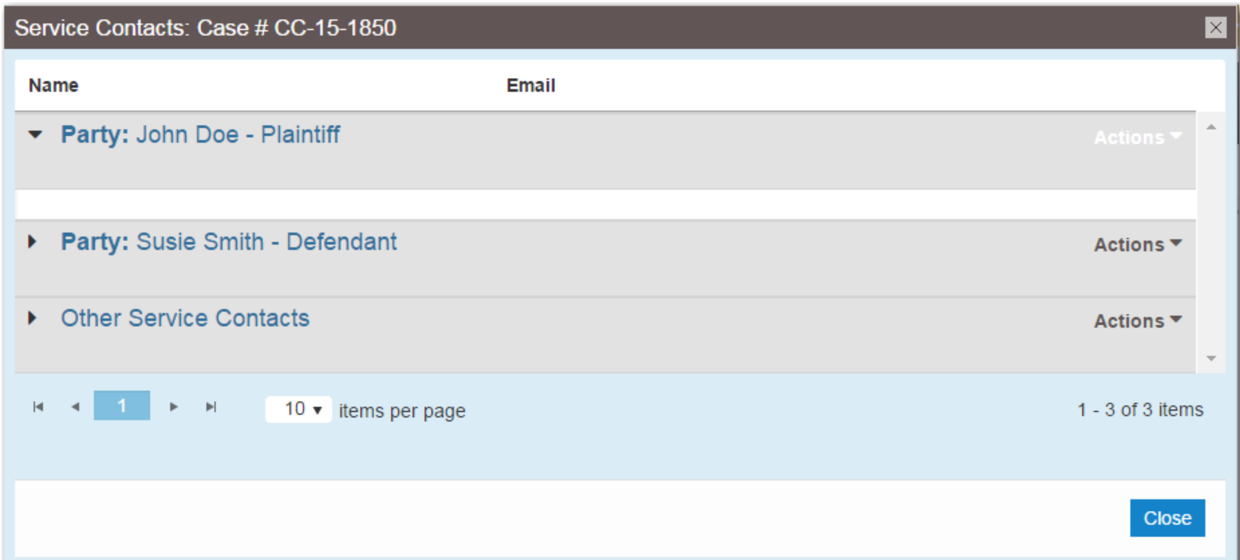


Figure 11.16 – Service Contacts Page

2. Locate the party to which you want to add a public service contact. From the **Actions** drop-down list for the specified party, select **Add From Public List**.

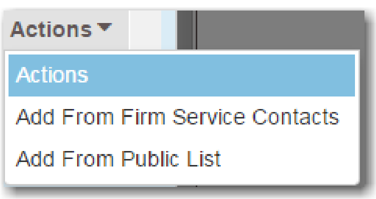


Figure 11.17 – Service Contacts Actions Drop-Down List

The *Add Service Contact from Public List* dialog box is displayed.

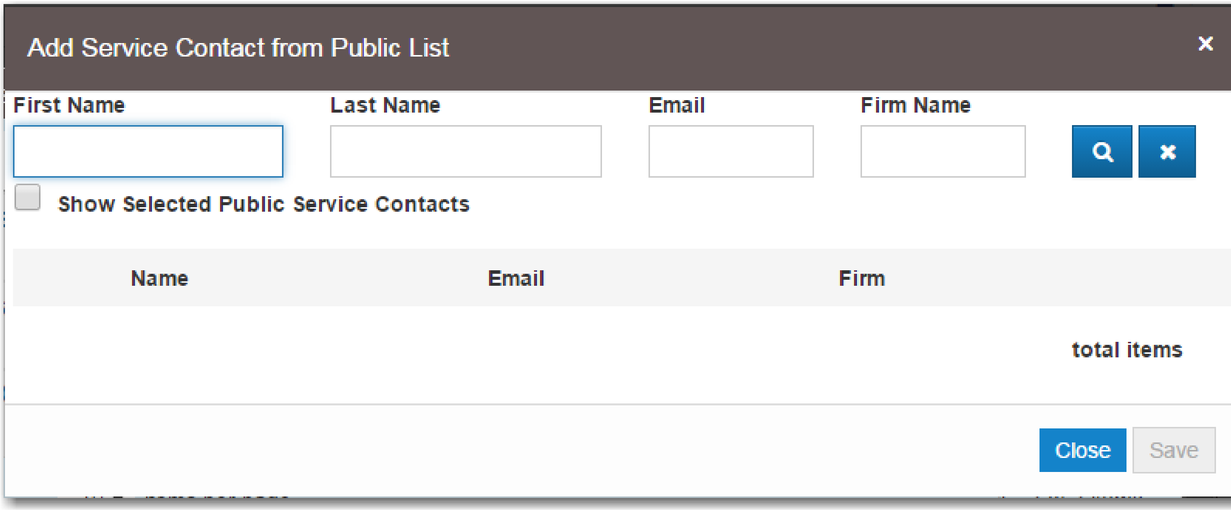


Figure 11.18 – Add Service Contact from Public List Dialog Box

3. Type the name of the service contact, or select the **Show Selected Public Service Contacts** check box to view the possible choices.

   The *Add Service Contact from Public List* page is displayed.

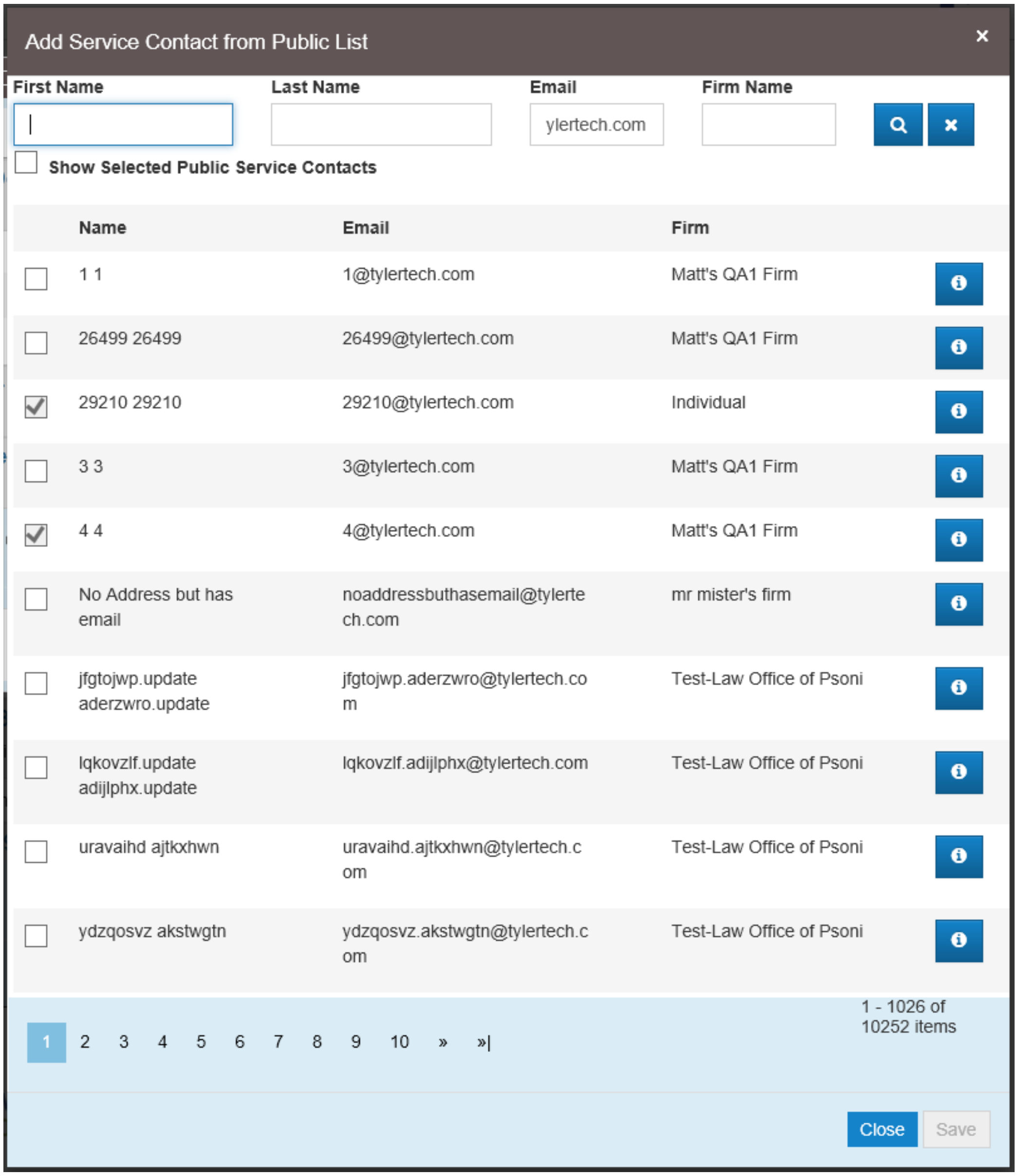


Figure 11.19 – Add Service Contact from Public List Page

4. Click the names of the public service contacts that you want to add to the case.
5. After selecting the public service contacts, click 

.

   The public service contacts are now displayed on the *Service Contacts* page under the party to which the public service contact has been added.
6. Click 

to return to the *Filing History* page.

Create New Service Contacts During a Filing

You can add service contacts while filing a case without first adding the service contacts to the Firm Service Contacts list.

Note: This feature is configured by Tyler and may not be available on your system.

Service contacts can be created from the following locations:

- The *Filing History* page
- When selecting **File Into Existing Case** from the *Filer Dashboard* page or the **Actions** drop-down list (i.e., performing a case search)
- When creating a new filing (in the **Service Contacts** section)

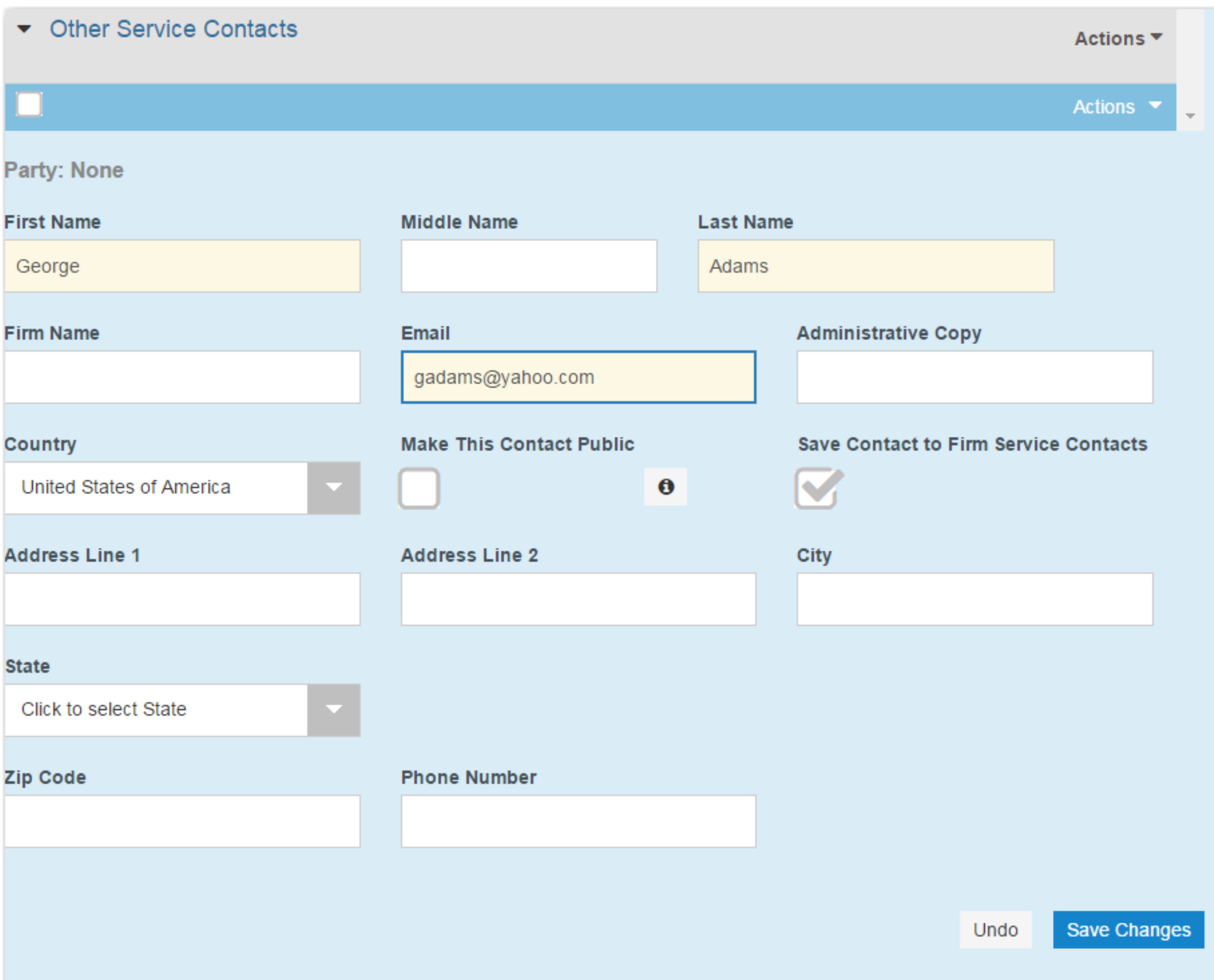


Figure 11.20 – Other Service Contacts Section (with New Contact Added)

After you add the new service contact, it is added to the *Firm Service Contacts* page.

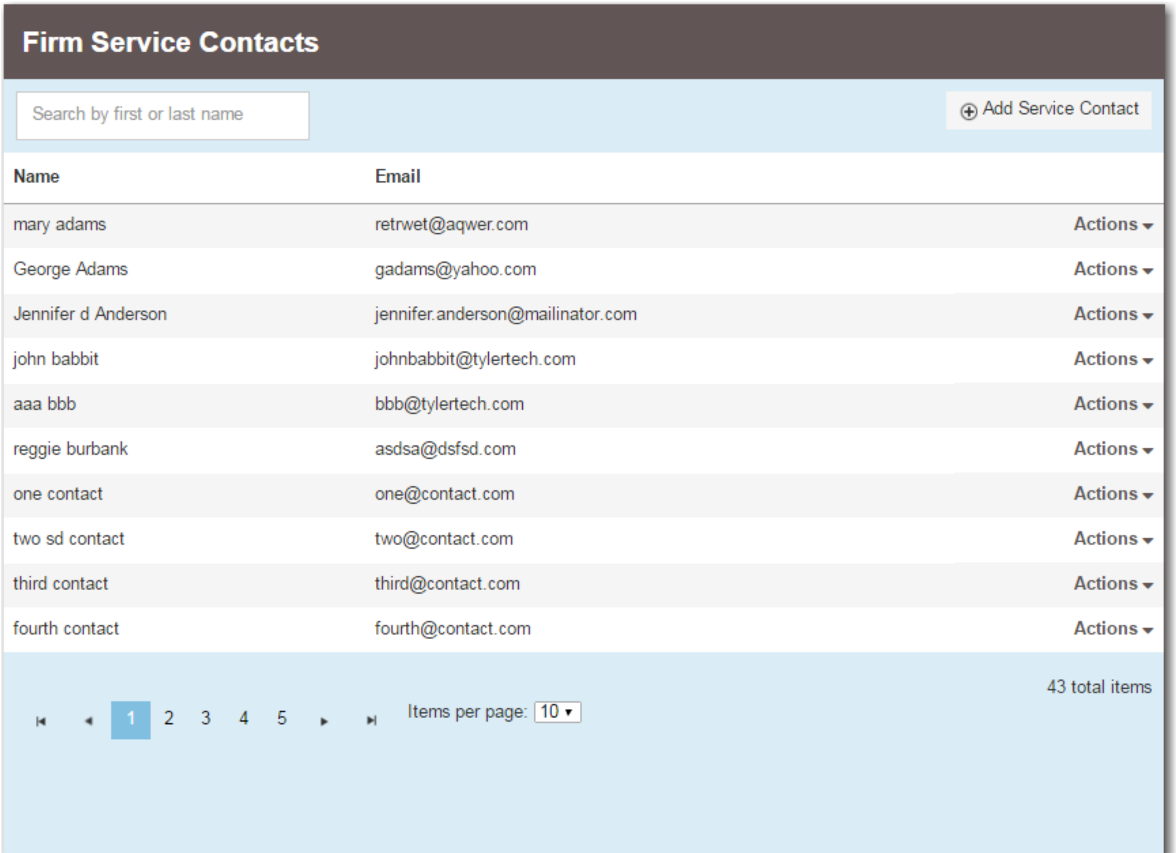


Figure 11.21 – Firm Service Contacts Page

Creating Firm Service Contacts from the Filing History Page

You can add service contacts to the Firm Service Contacts list for an existing case from the *Filing History* page.

To create a service contact from the *Filing History* page, perform the following steps:

1. From the **Actions** drop-down list, select **Filing History**.

   The *Filing History* page is displayed.

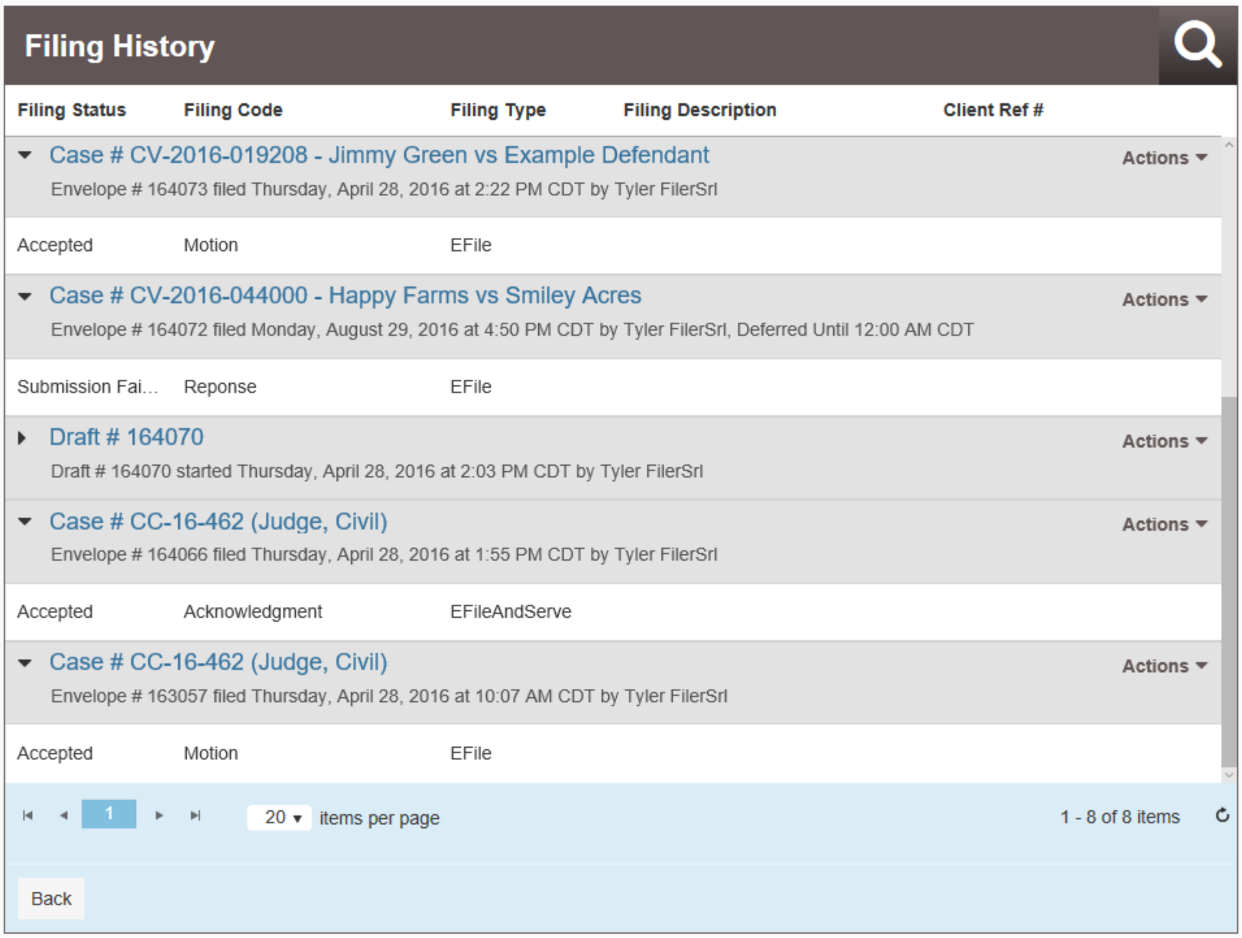


Figure 11.22 – Filing History Page

2. Locate a case for which you want to add a service contact. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

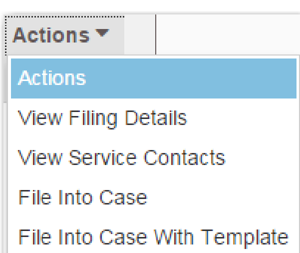


Figure 11.23 – Actions Drop-Down List

The *Service Contacts* page for the specified case is displayed.

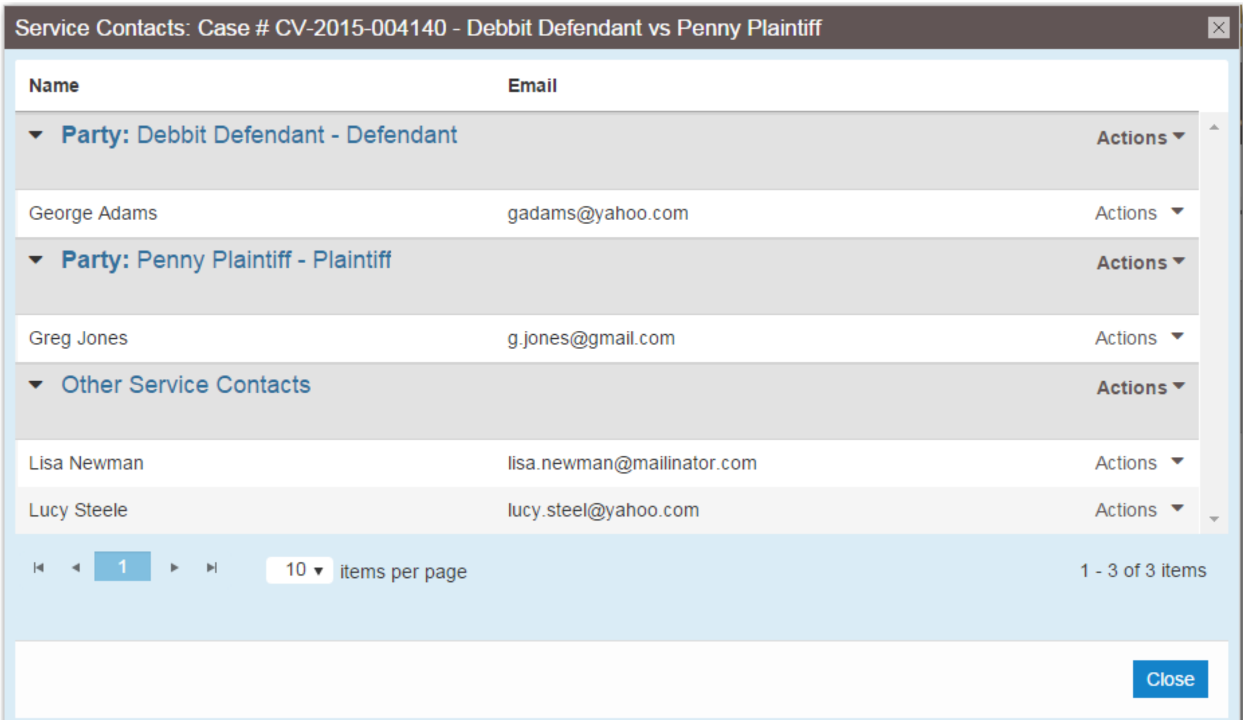


Figure 11.24 – Service Contacts Page

3. From the **Actions** drop-down list for the specified party, select **Add New Service Contact**.

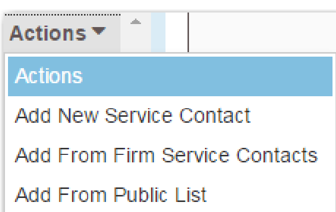


Figure 11.25 – Service Contacts Actions Drop-Down List

Note: You can also add new service contacts to the case in the Other Service Contacts section.

The page expands with new fields to complete for the new service contact.

4. Complete the required information for the new contact, and select the **Save Contact to Firm Service Contacts** check box to add the contact to the Firm Service Contacts list.

Figure 11.26 – Save Contact to Firm Service Contacts Check Box

Creating Firm Service Contacts During a Case Search (File Into Existing Case)

To create a firm service contact during a case search, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **File Into Existing Case**.

   Note: You can also click File into Existing Case on the Filer Dashboard in the New Filing section.

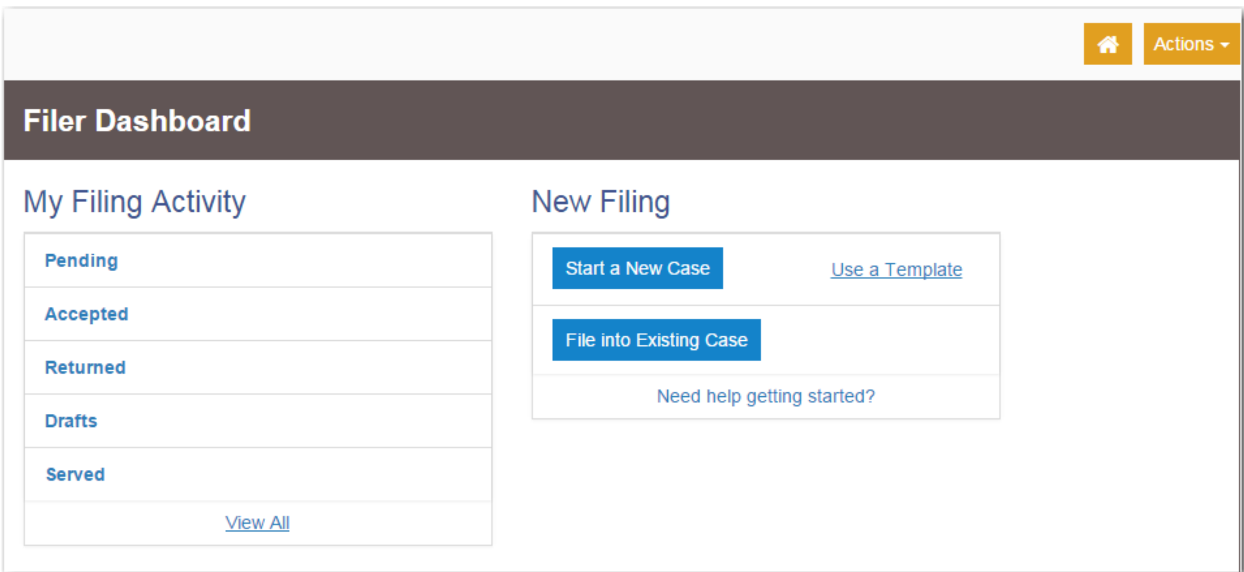


Figure 11.27 – Filer Dashboard Page

The *File Into Existing Case* page is displayed.

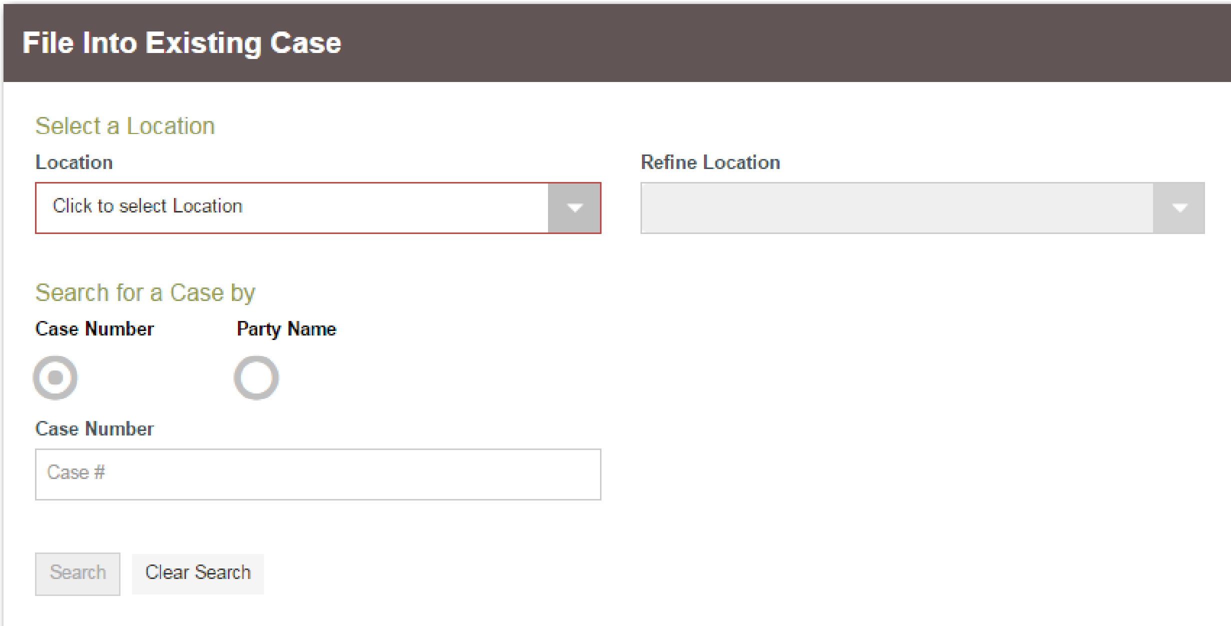
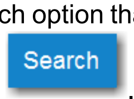


Figure 11.28 – File Into Existing Case Page

2. Select the county or district location from the **Location** drop-down list, and then select the specific court from the **Refine Location** drop-down list.

   Note: The items in the Refine Location list are determined by the location you selected.

   Note: The location filtering feature is configured by Tyler and may not be available on your system.

3. Click the search option that you plan to use: **Case Number** or **Party Name**. Enter the search criteria, and then click 

.
4. From the **Actions** drop-down list associated with the case, select **View Service Contacts**.

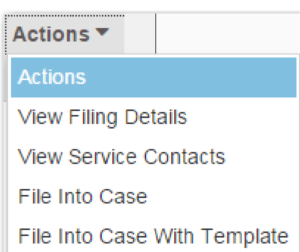


Figure 11.29 – Actions Drop-Down List

   The *Service Contacts* page for that case is displayed.

5. Locate the party for which you want to add service contacts. From the **Actions** drop-down list for the specified party, select **Add New Service Contact**.

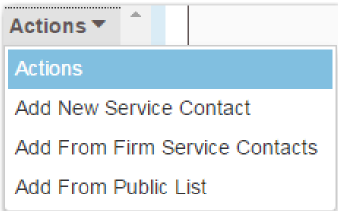


Figure 11.30 – Service Contacts Actions Drop-Down List

The page expands with new fields to complete for the new service contact.

6. Complete the required information for the new contact, and select the **Save Contact to Firm Service Contacts** check box to add the contact to the Firm Service Contacts list.

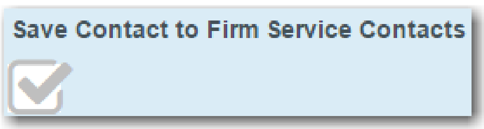


Figure 11.31 – Save Contact to Firm Service Contacts Check Box

7. Click 

.

Creating Firm Service Contacts During Envelope Creation

To create service contacts during envelope creation, perform the following steps:

1. From the *Filer Dashboard* page or the **Actions** drop-down list, select **Start a New Case**.

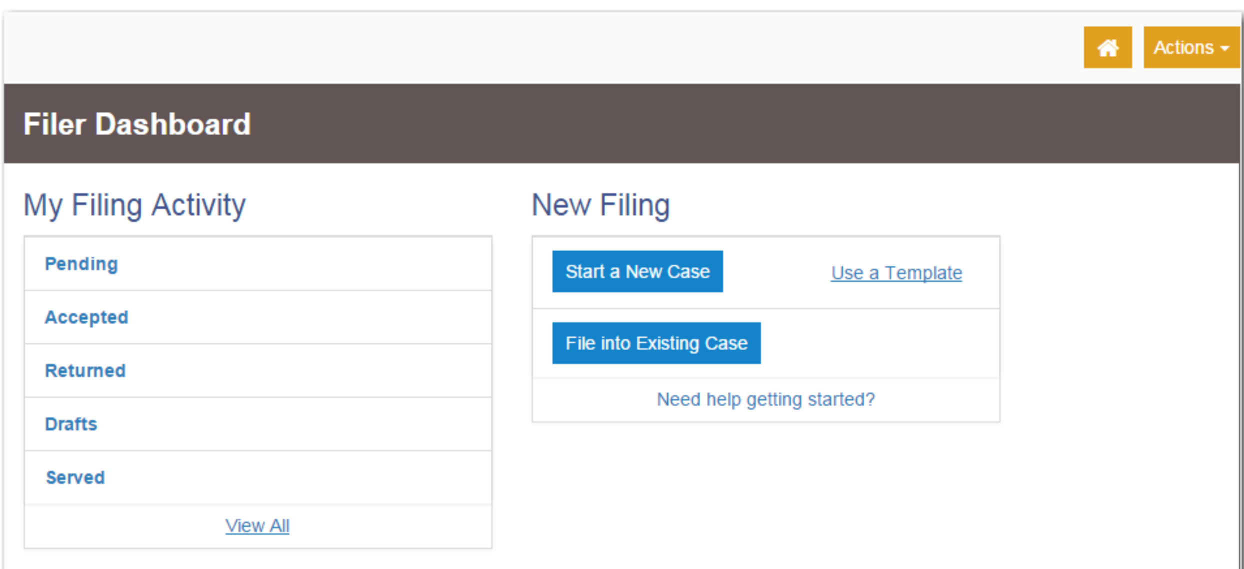


Figure 11.32 – Filer Dashboard Page

2. Complete the required fields in the **Case Information**, **Party Information**, and **Filings** sections.
3. Navigate to the **Service Contacts** section. Locate the party to which you want to add a service contact.
4. Select **Add New Service Contact** from the **Actions** drop-down list for the specified party.

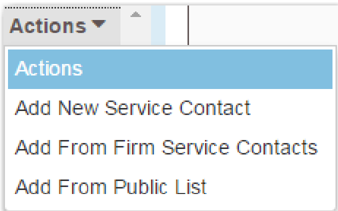


Figure 11.33 – Service Contacts Actions Drop-Down List

5. Complete the required fields for the new contact.

   Note: The Save Contact to Firm Service Contacts check box is selected by default. You can clear the check box if you do not want to add the service contact to the Firm Service Contacts list.

Figure 11.34 – Save Contact to Firm Service Contacts Check Box

6. Click 

, and then continue with the rest of the filing creation.

SELECTING THE SERVICE METHOD FOR SERVICE CONTACTS

You can select the service method for a service contact when you start a new case or when you add a service contact to an existing case.

To select the service method for a service contact when starting a new case, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

   The *Start a New Case* page is displayed.
2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section:

   Note: A red box around the field indicates that it is required.
3. Complete the fields in the **Party Information** section.
4. Enter the filing details for the case in the **Filings** section.
5. In the **Service Contacts** section, locate the party to which you want to add a service contact. From the **Actions** drop-down list for the specified party, select **Add From Firm Service Contacts**.

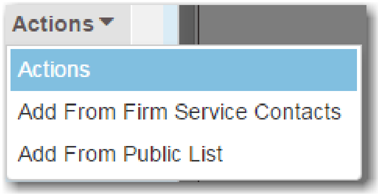


Figure 11.35 – Service Contacts Actions Drop-Down List

The *Add From Firm Service Contacts* dialog box is displayed.

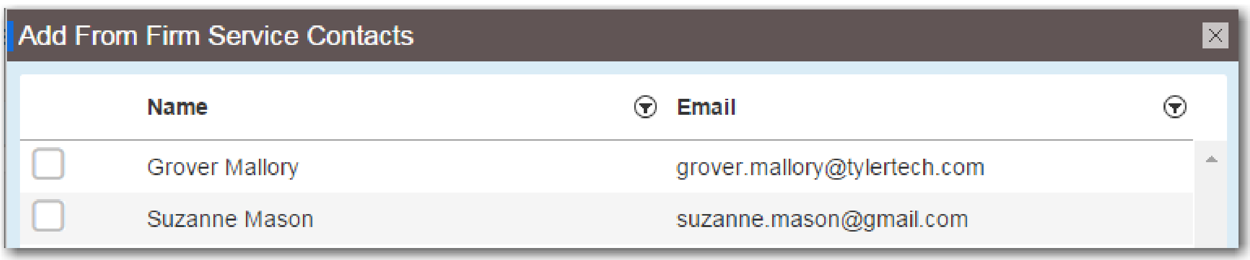


Figure 11.36 – Add From Firm Service Contacts Dialog Box

6. Select the check box next to the service contacts that you want to add to the case.

7. After selecting the new service contacts, click  .

   The new service contacts are now displayed in the **Service Contacts** section under the party to which the service contact has been added.

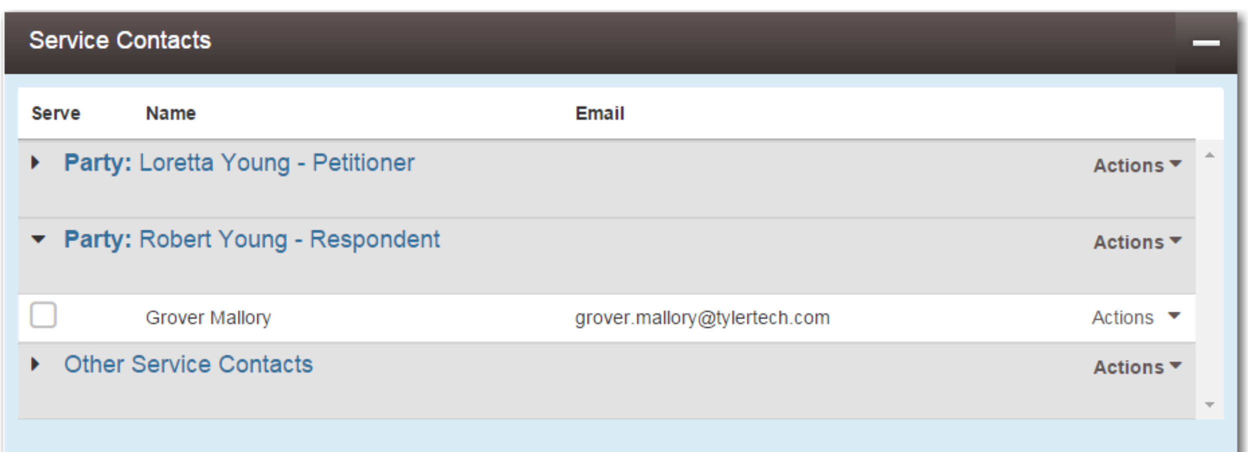


Figure 11.37 – Service Contacts Section

8. In the **Service Contacts** section, click the name of the new service contact that you added to select a service method.

   The **Service Method** field is displayed, along with the rest of the service contact's information.

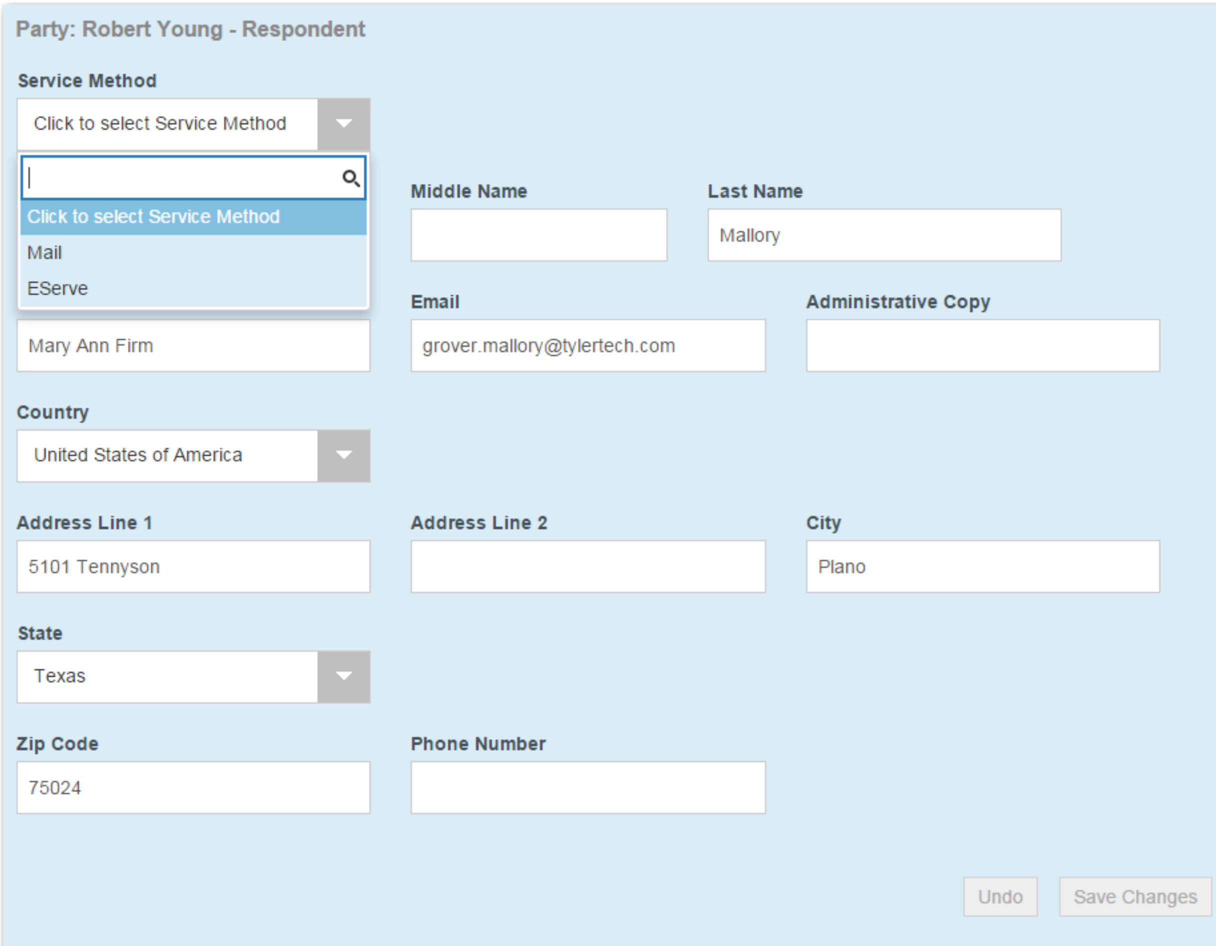


Figure 11.38 – Service Method Field in Service Contacts Section

9. Select the service method that you want from the **Service Method** drop-down list.

   Note: When the service method is set to EServe, an email address is required. When the service method is set to Mail, a street address is required.

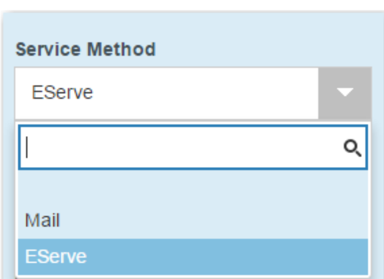


Figure 11.39 – Service Method Drop-Down List

10. Click 

.
11. Continue with the rest of your filing (i.e., selecting the fees).

12. When done, click either Save as Draft or Summary.

Viewing Attached Case List of Firm Service Contacts

To view the case list that is attached to a firm service contact, perform the following steps:

1. From the **Actions** drop-down list, select **Firm Service Contacts**.

   The *Firm Service Contacts* page is displayed.

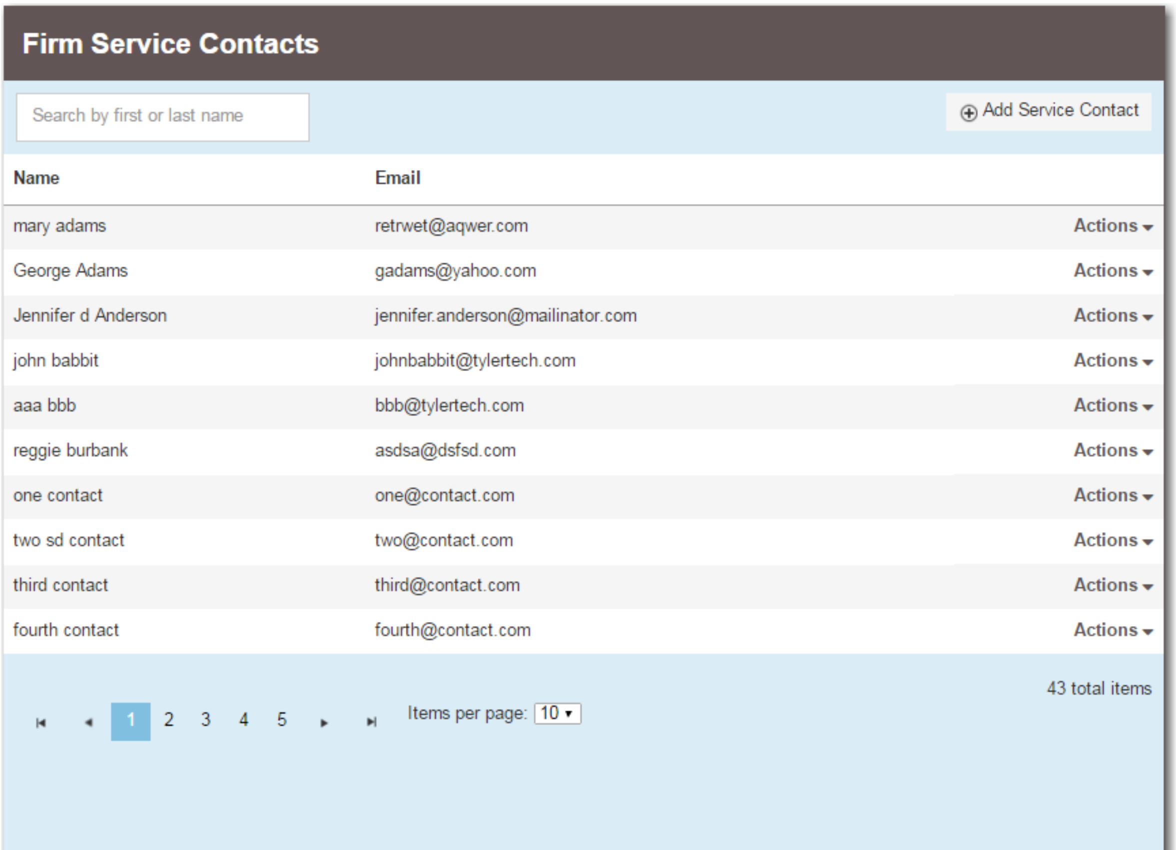


Figure 11.40 – Firm Service Contacts Page

2. Locate the name of the service contact for whom you want to view the attached cases. From the **Actions** drop-down list for the specified contact, select **View Attached Case List**.

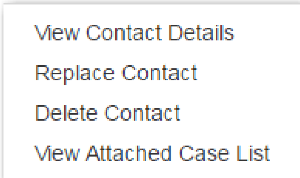


Figure 11.41 – Service Contacts Actions Drop-Down List

The attached case list is displayed.

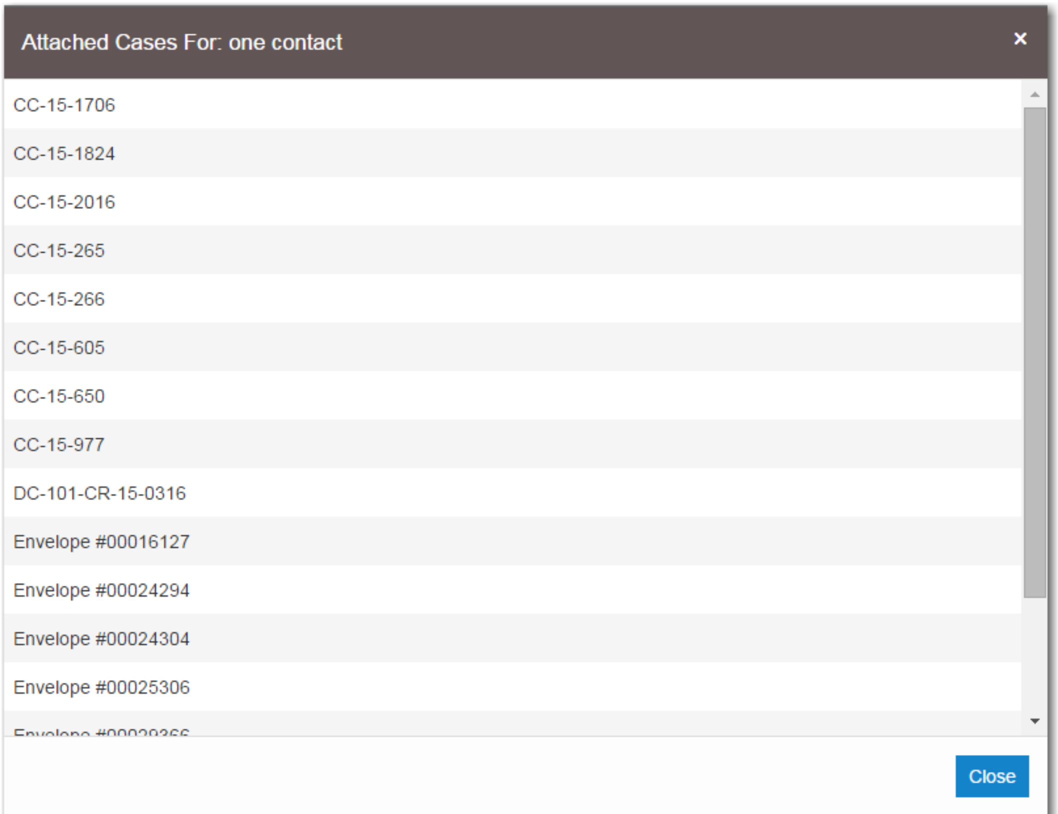


Figure 11.42 – Attached Cases Page

Linking a Service Contact to Another Party

You can link a service contact associated to a party on a case to another party on the same case.

To link a service contact to another party, perform the following steps:

1. From the *Filing History* page, locate the case for which you want to modify the service contacts. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

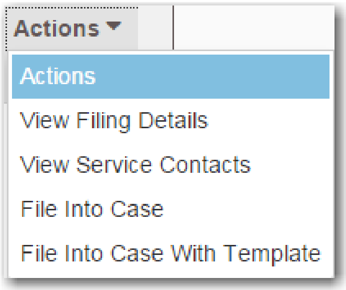


Figure 11.43 – Actions Drop-Down List

The *Service Contacts* page for the specified case is displayed.

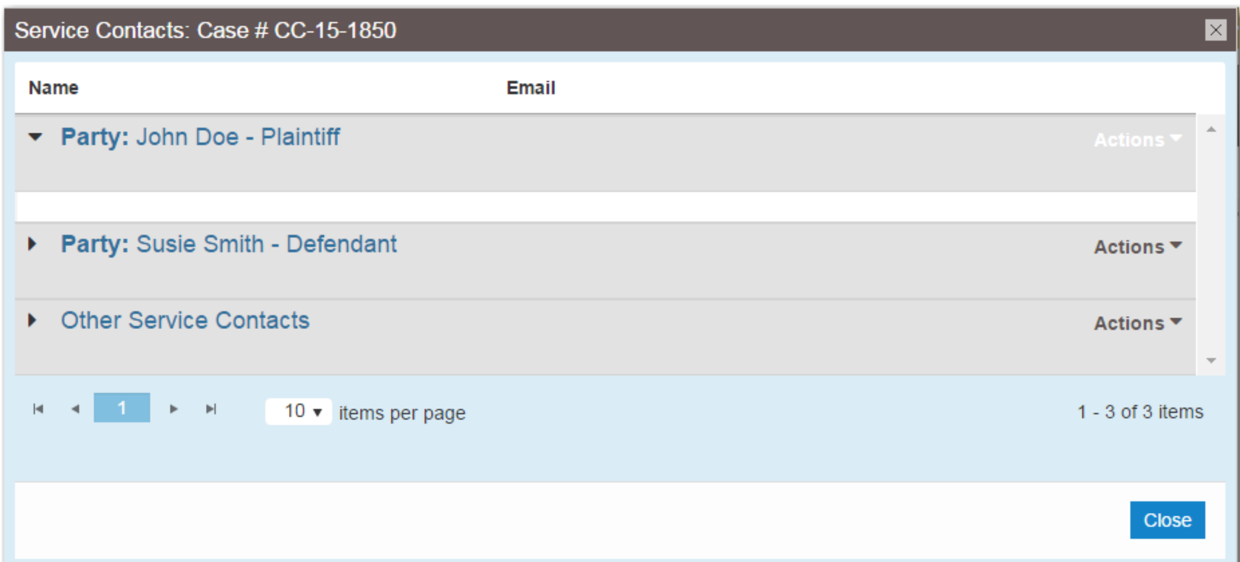


Figure 11.44 – Service Contacts Page

2. From the **Actions** drop-down list for the specified party, select **Link Parties with Contact**.

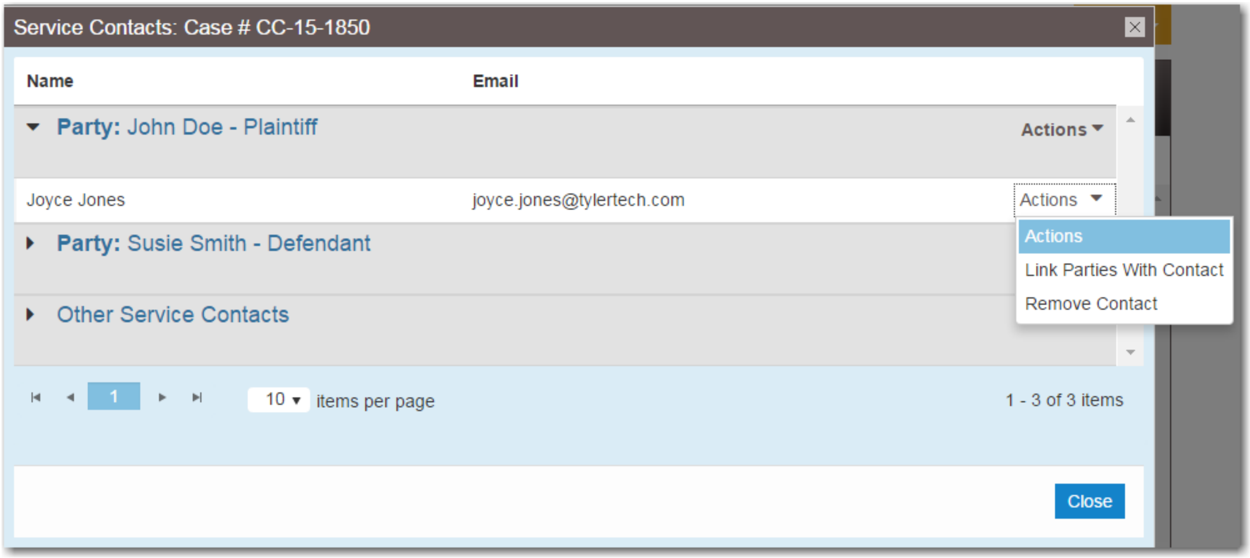


Figure 11.45 – Link Parties with Contact Drop-Down List on the Service Contacts Page

The *Link Parties* dialog box is displayed. You can link or unlink service contacts to parties on the case by selecting or clearing the check box associated with the party.

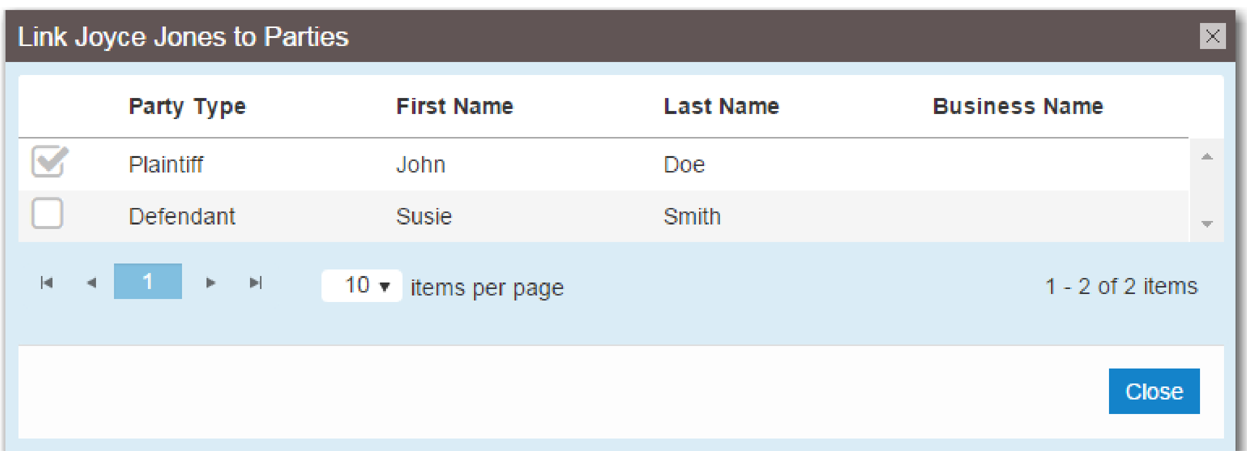


Figure 11.46 – Link Parties Dialog Box

3. Click 

to return to the *Service Contacts* page for the specified case.

Search and Paging Capability for Firm Service Contacts

Firm service contacts can be displayed on multiple pages to allow for searching among the contacts.

The paging is activated when more than 10 service contacts exist in the system. You can select the number of items per page to be displayed: 10, 25, or 50.

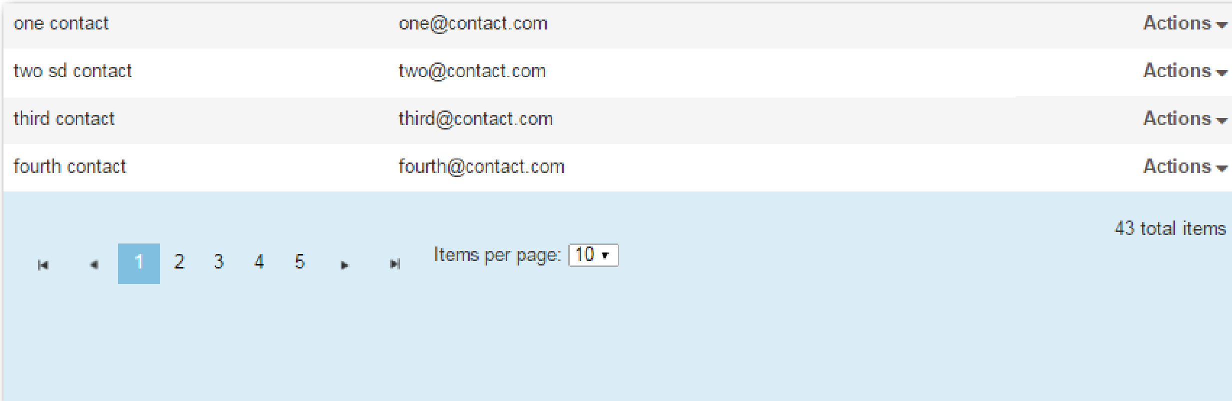


Figure 11.47 – Firm Service Contacts Page with Paging Feature

Also, you can search for a specific service contact by typing part of or the entire contact's name in the text box on the *Firm Service Contacts* search page.

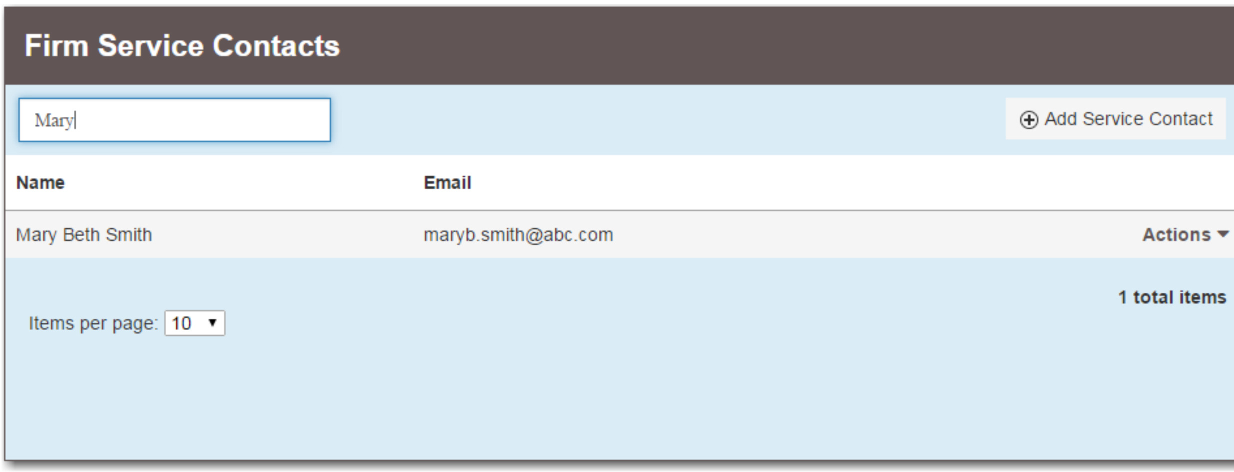


Figure 11.48 – Firm Service Contacts Search Page

Removing a Service Contact from a Case

You can remove a service contact that was previously added to a case.

Note: You can remove a service contact from a case only if you or your firm created that service contact or added that service contact to the case.

To remove a service contact from a case, perform the following steps:

1. From the *Filing History* page, locate the case from which you want to remove a service contact. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

   The *Service Contacts* page for the specified case is displayed.

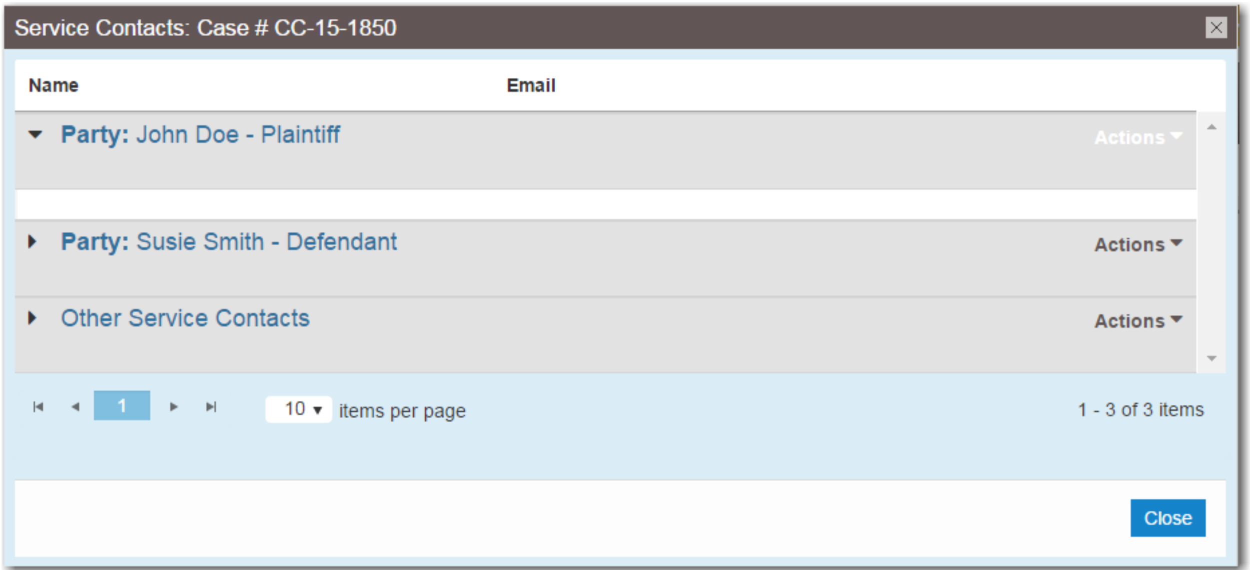


Figure 11.49 – Service Contacts Page

2. Locate the service contact that you want to remove. From the **Actions** drop-down list for the specified contact, select **Remove Contact**.

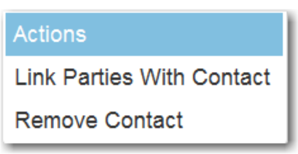


Figure 11.50 – Service Contacts Actions Drop-Down List

The contact is removed from the case.

Note: A notification is sent to service contacts that are being removed from a case.

Note: If the contact is a public service contact, it remains on the public service contacts list and can only be removed from the public list by a member of the firm that originally added the service contact.

Deleting a Service Contact from the Firm

You can delete a service contact associated with your firm.

To delete a service contact from your firm, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Firm Service Contacts**.

   The *Firm Service Contacts* page is displayed.

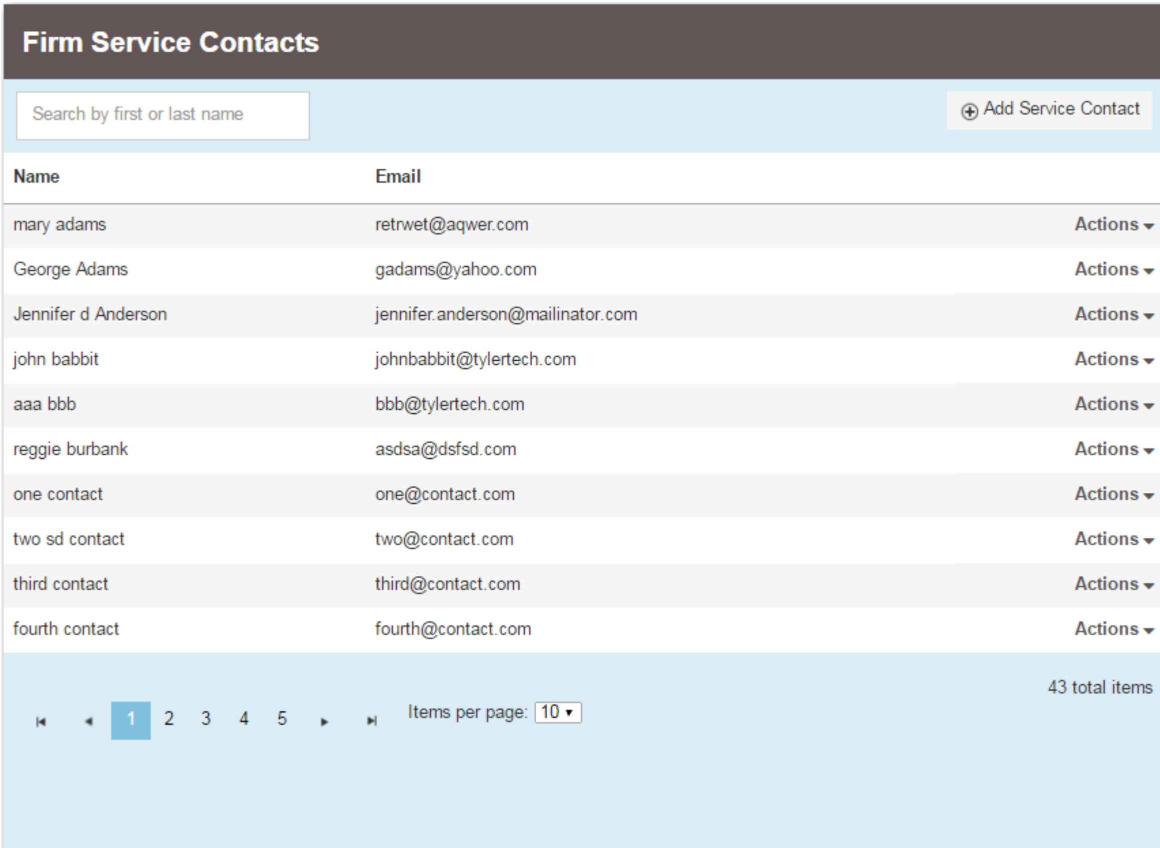


Figure 11.51 – Firm Service Contacts Page

2. Locate the service contact that you want to delete.
3. From the **Actions** drop-down list for the specified service contact, select **Delete Contact**.

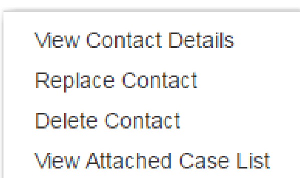


Figure 11.52 – Firm Service Contacts Actions Drop-Down List

The *Delete Service Contact* dialog box is displayed.

Note: A warning message is displayed, which indicates the number of cases to which the service contact is attached. The warning message also reminds you that deleting a service contact cannot be undone.

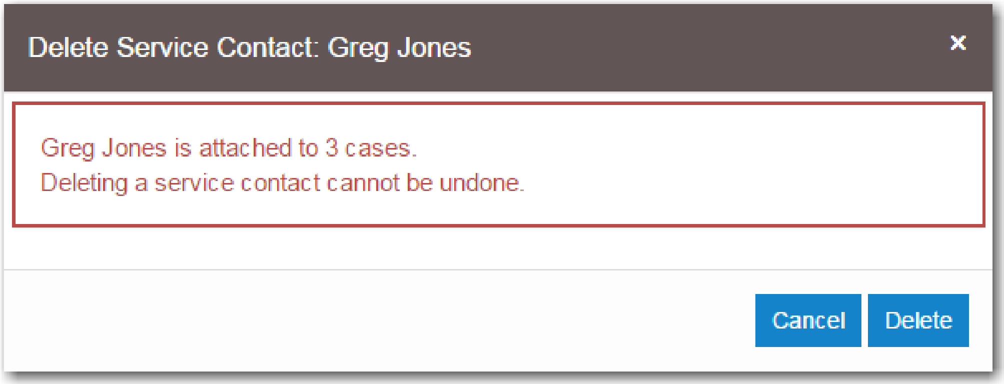


Figure 11.53 – Delete Service Contact Dialog Box

4. Click Delete to delete the contact, or click Cancel to cancel the action.

   If you deleted the service contact, it is removed from the Firm Service Contacts list and from any filings to which it was attached.

Chapter 12 Filings

Topics Covered in This Chapter

After you have uploaded and submitted your filing, the filing is displayed on the *Filing History* page. From this page, you can view the status of your filing, check the filing type, get a document description, see the number assigned to your case, review the details of the case, and cancel a filing. You can also view the time and date that the filing was submitted. The time stamp corresponds to the time zone in which the filing occurred.

View Filings

You can view the details of a case after starting a new case or filing into an existing case by using the *Filing History* page.

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

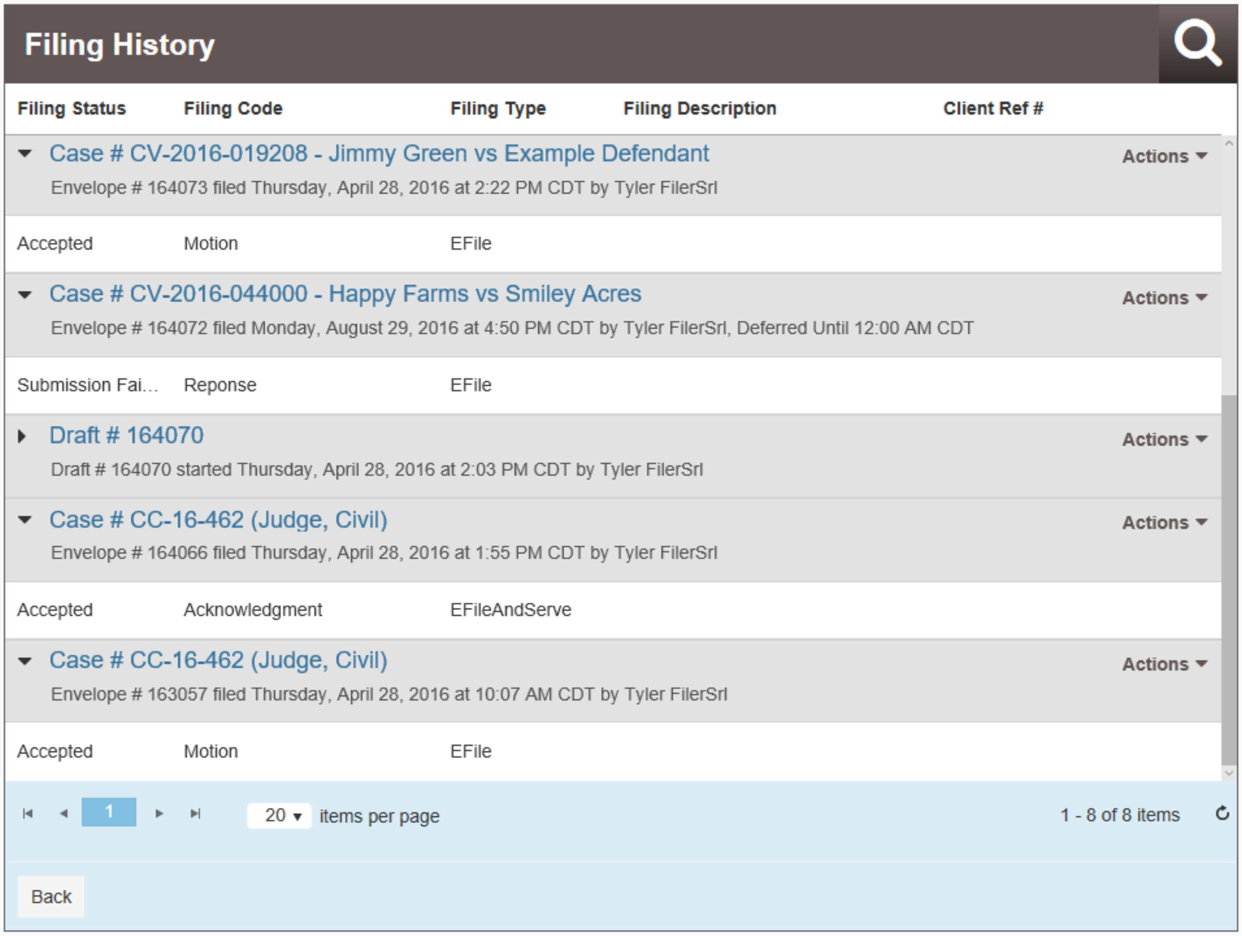


Figure 12.1 – Filing History Page

Filtering the Filings Queue

The *Filing History* page displays the status of each filing. The status information is located in the **Filing Status** column.

Note: You can see the status for only the filings that you have submitted, not for all filings related to a case.

To filter information in the filings queue, perform the following steps:

1. Select **Filing History** from the **Actions** drop-down list on the *Filer Dashboard* page.

   All relevant information concerning your filings is displayed on the *Filing History* page.

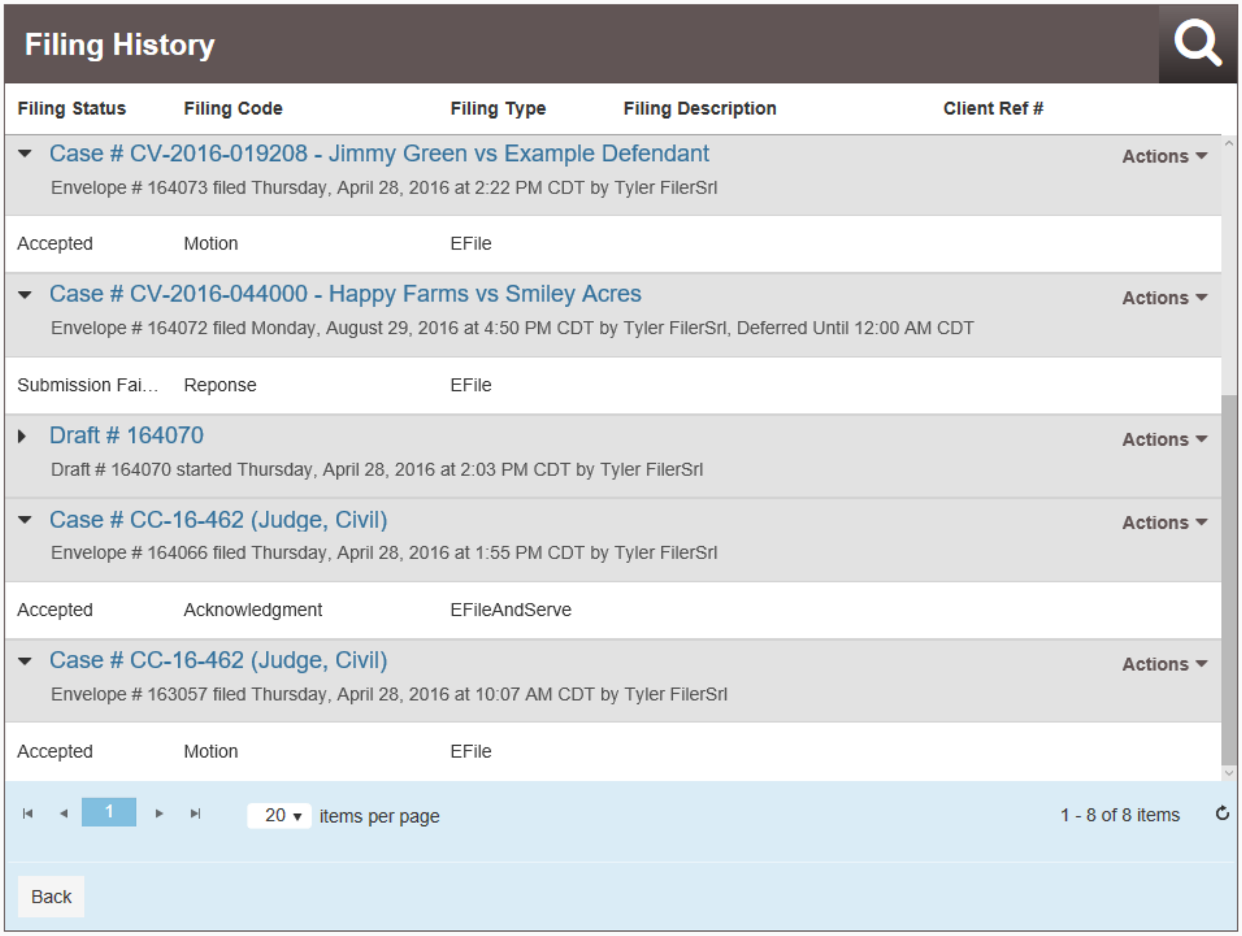


Figure 12.2 – Filing History Page

2. Click **Search** () to filter the search.

   The *Filing History* page for filtering a search is displayed.

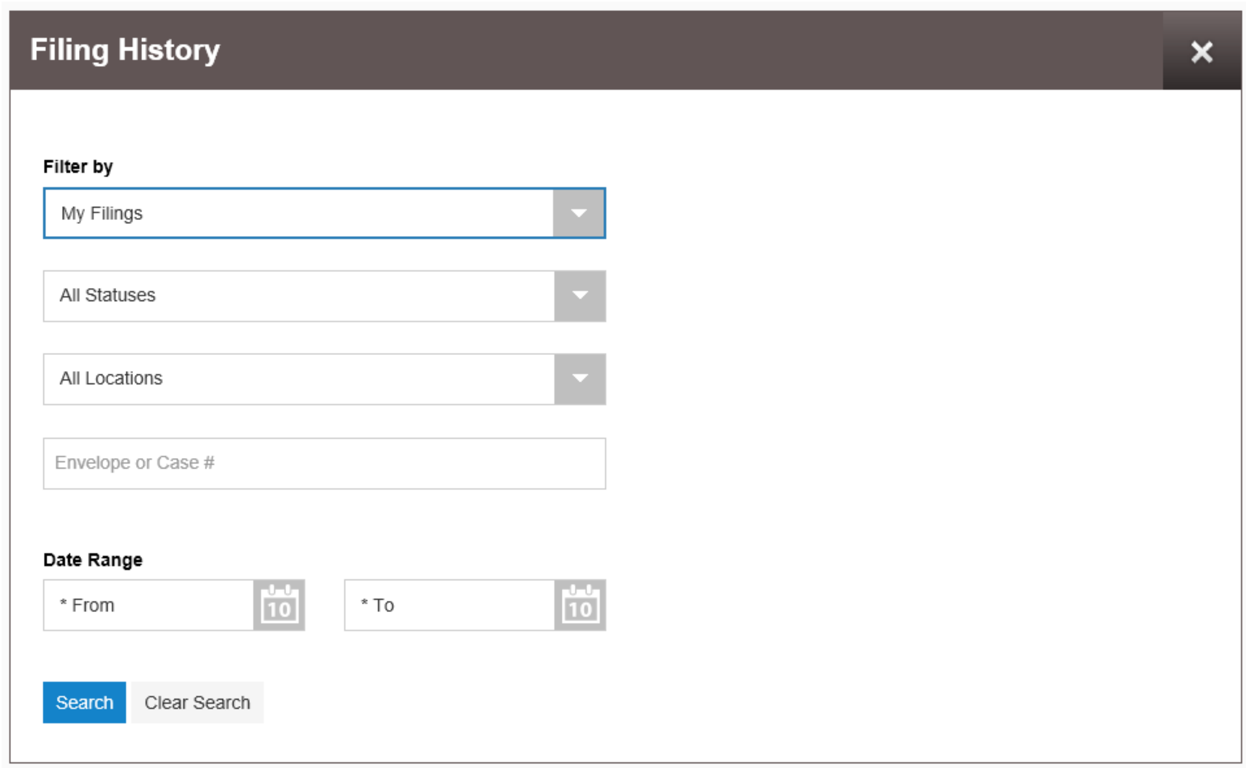


Figure 12.3 – Filing History Page for Filtering a Search

Note: To clear the filter, click  **.**

3. Enter more criteria to refine your search.

   a. In the **Filter by** field, select an option from the drop-down list.

Figure 12.4 – Filter by Drop-Down List

   b. Select the status from the **All Statuses** drop-down list.

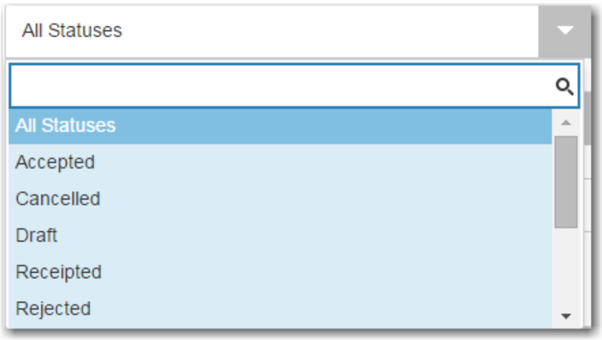


Figure 12.5 – All Statuses Drop-Down List

c. Select the location from the **All Locations** drop-down list.

d. If known, type the envelope or case number in the **Envelope or Case #** field.

e. In the **Date Range** field, select the dates for your search. For the **From** or the **To** date, click  to select dates from a calendar. Or, type the dates manually (for example, `7/15/2015`).

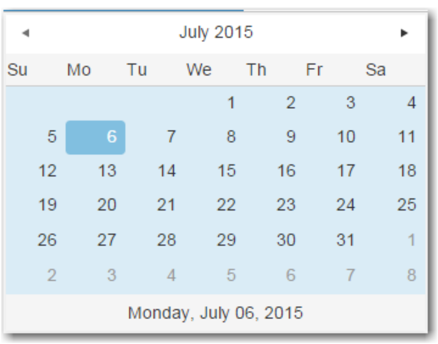


Figure 12.6 – Filter Date Calendar

4. Click 

A list of cases meeting your search criteria is displayed.

Copying the Envelope

You can copy an envelope to create a new envelope to resubmit to the courts if all filings on the envelope have been canceled or rejected.

Note: After you copy your envelope with a rejected filing, note that the first filing in the filing table is selected.

Note: This feature requires special configuration by Tyler. The feature can be configured two different ways. One way is to display the Copy Envelope option only one time. If the system is configured in this manner, you can copy the envelope only once. You cannot copy it again. The second configuration is to display the Copy Envelope option at all times. If the system is configured in this manner, you can copy the envelope multiple times.

To copy an envelope, perform the following steps:

1. From the **Actions** drop-down list, select **Filing History**.

   The *Filing History* page is displayed.

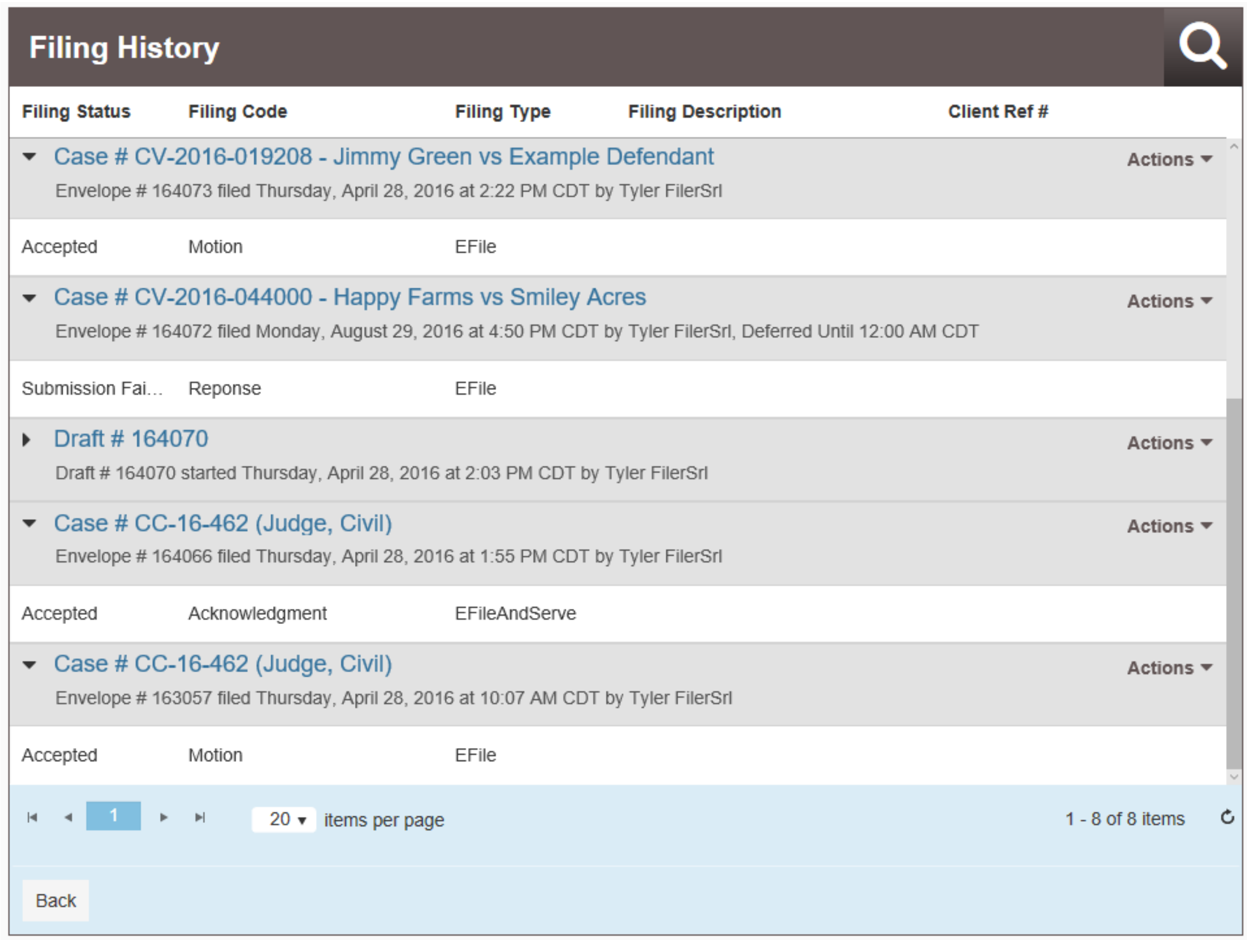


Figure 12.7 – Filing History Page

2. Locate your envelope on the *Filing History* page.
3. From the envelope **Actions** drop-down list, select **Copy Envelope**.

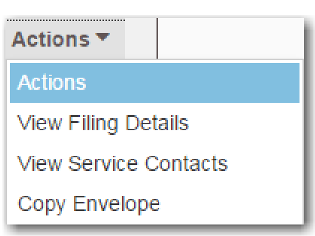


Figure 12.8 – Actions Drop-Down List

   The *Envelope* page is displayed.

4. Continue with your filing.

Viewing the Envelope Details

From the *Filing History* page, you can see the information entered for the envelope, the filing details, and the documents submitted.

To view the envelope details, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Filing History**.

   The *Filing History* page is displayed.

   Note: The time stamp indicates the time and date that the filing was submitted. The time stamp corresponds to the time zone in which the filing occurred.

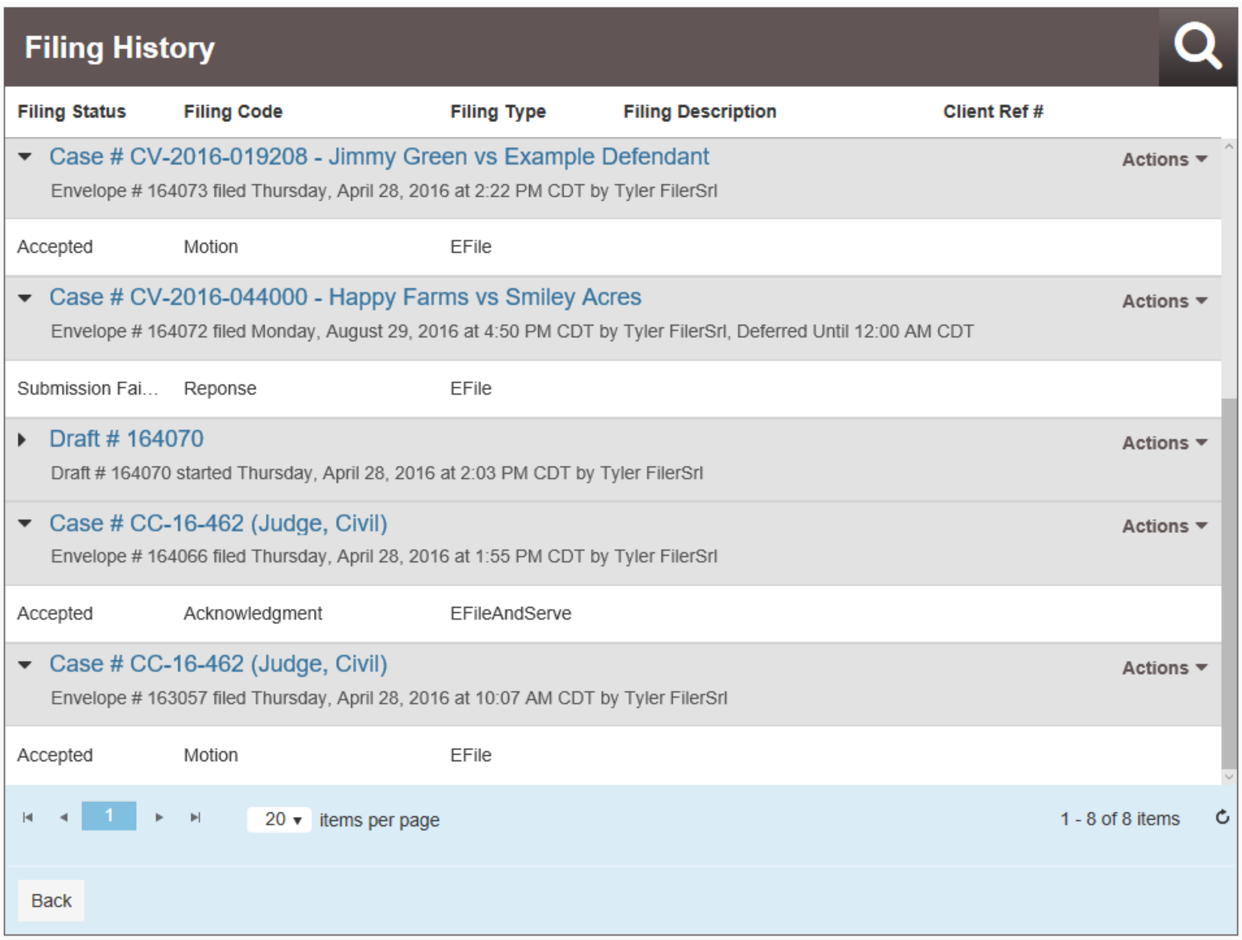


Figure 12.9 – Filing History Page

2. Locate your case on the *Filing History* page.
3. From the envelope **Actions** drop-down list, select **View Filing Details**.

   The *Envelope* page is displayed.

   Note: Only fields that contain values are displayed in the filing details. Fields that contain no data are not displayed.

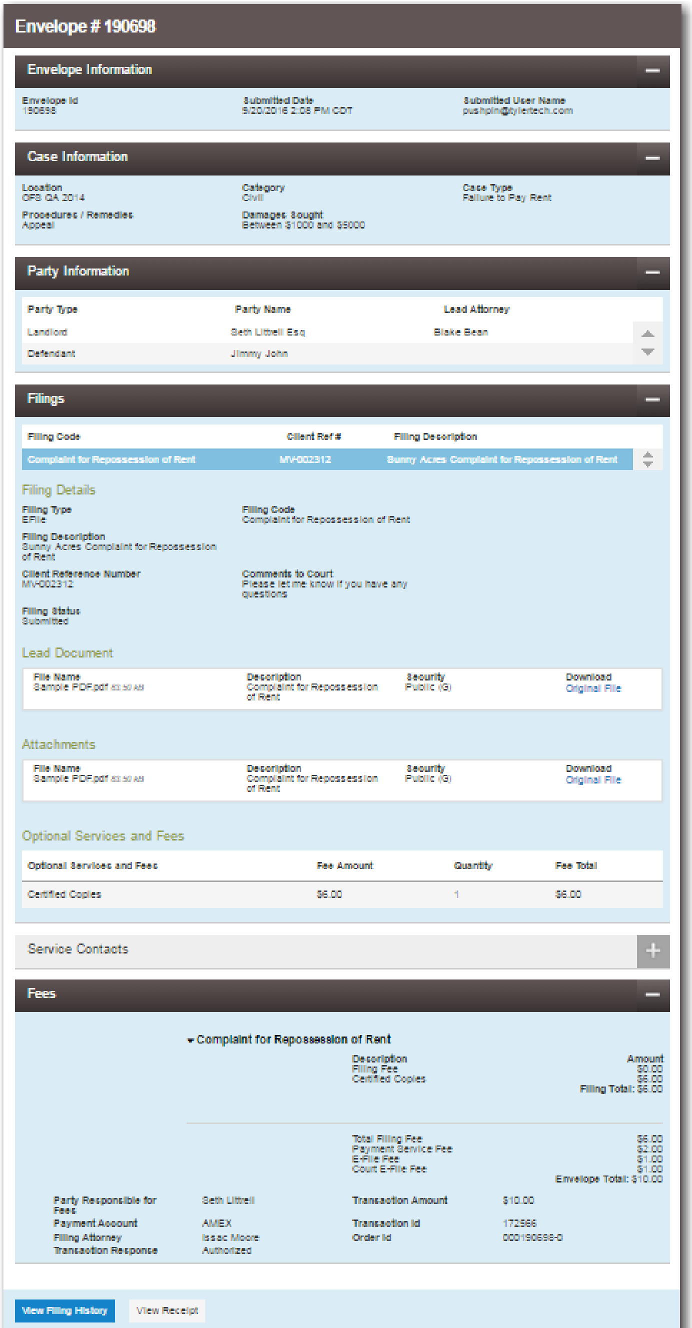


Figure 12.10 – Envelope Page

4. To return to the *Filing History* page, either select **Filing History** from the **Actions** drop-down list, or click 

.

Resuming the Filing Process

You can resume drafts after logging off from the system or exiting the filing process by accessing your case on the *Filing History* page.

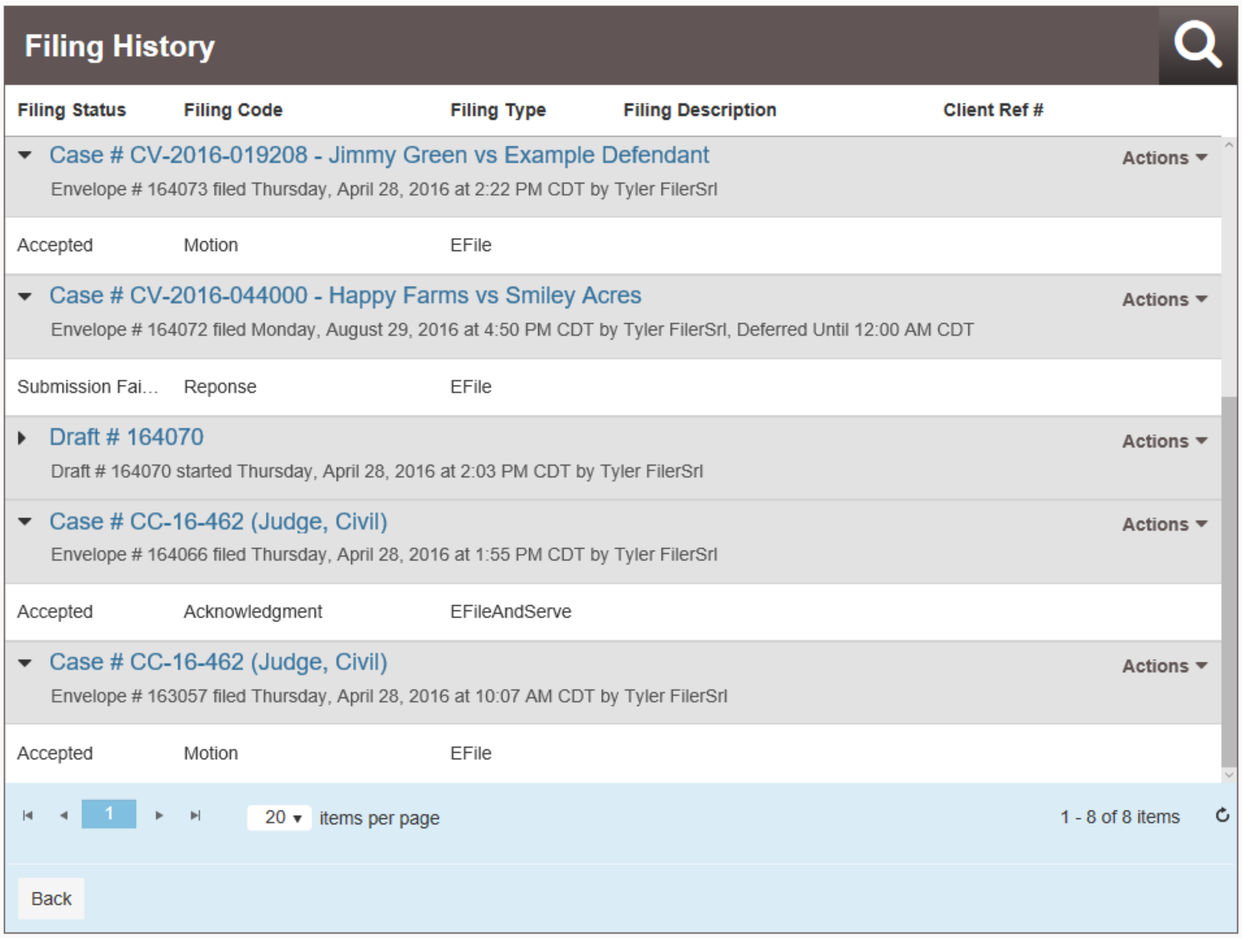


Figure 12.11 – Filing History Page

To resume the filing process on the case, perform the following steps:

1. Select the draft on the *Filing History* page for which you want to resume a filing.
2. From the **Actions** drop-down list for the specified draft, select **Resume Draft Envelope**.

   The envelope is displayed at the location where you left off.
3. Continue completing the fields for this filing.

Canceling a Filing

You can cancel a filing that you submitted before it has been reviewed by the court.

To cancel the filing, perform the following steps:

1. On the *Filing History* page, locate the filing that you want to cancel.

   Note: The filing must be in the Submitted state to be canceled.

2. Pause the cursor over the Cancel icon (), and click the icon.

Note: Ensure that you want to cancel the filing before you click the icon. Once you click the icon, the filing is canceled immediately, and you cannot undo the action.

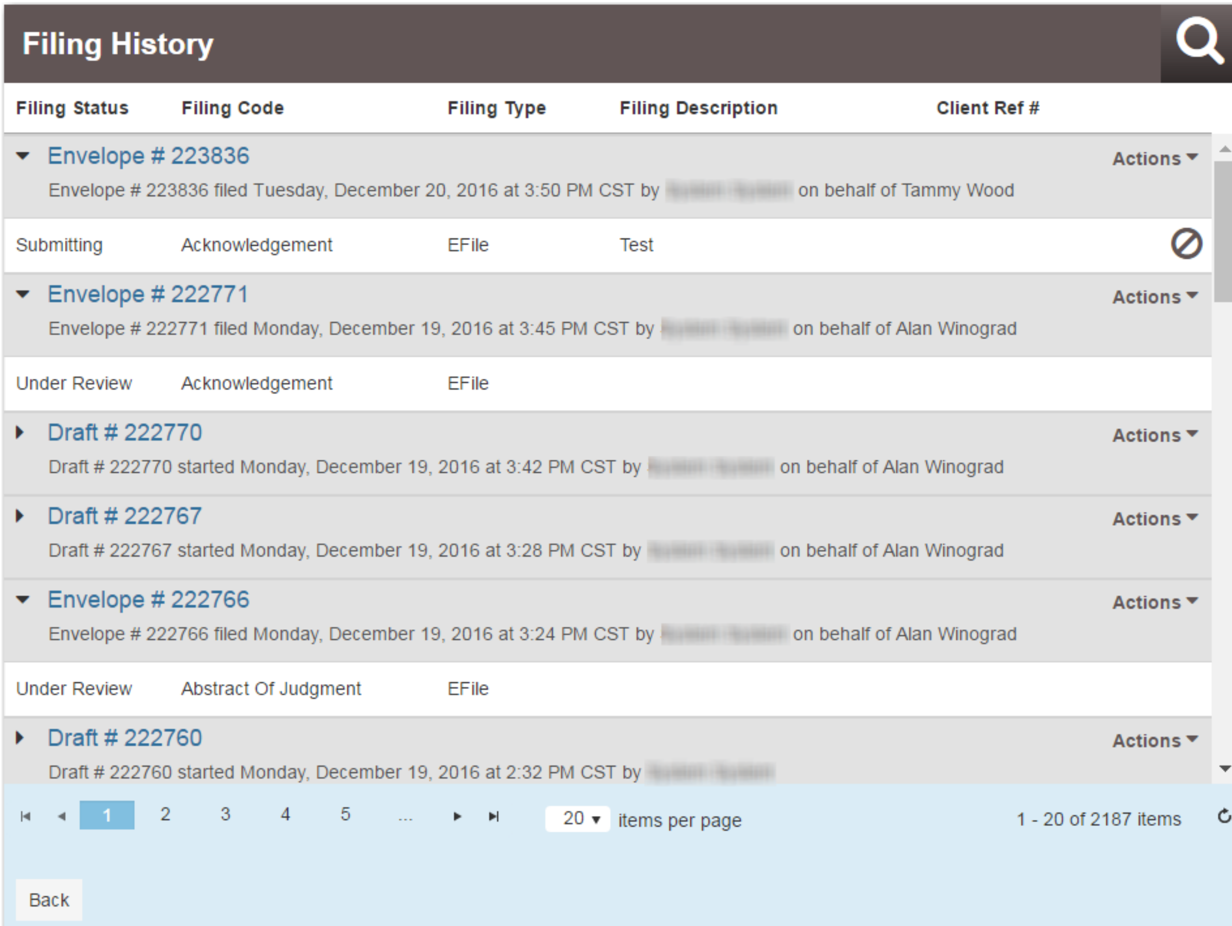


Figure 12.12 – Filing History Page – Canceling a Filing

Chapter 13 Bookmarks

The *Bookmarks* page displays a list of case numbers, locations, and descriptions for the cases that you have bookmarked. Only you and your firm (depending on the firm setup) can see this information. Neither the public nor any other firm can see your case list.

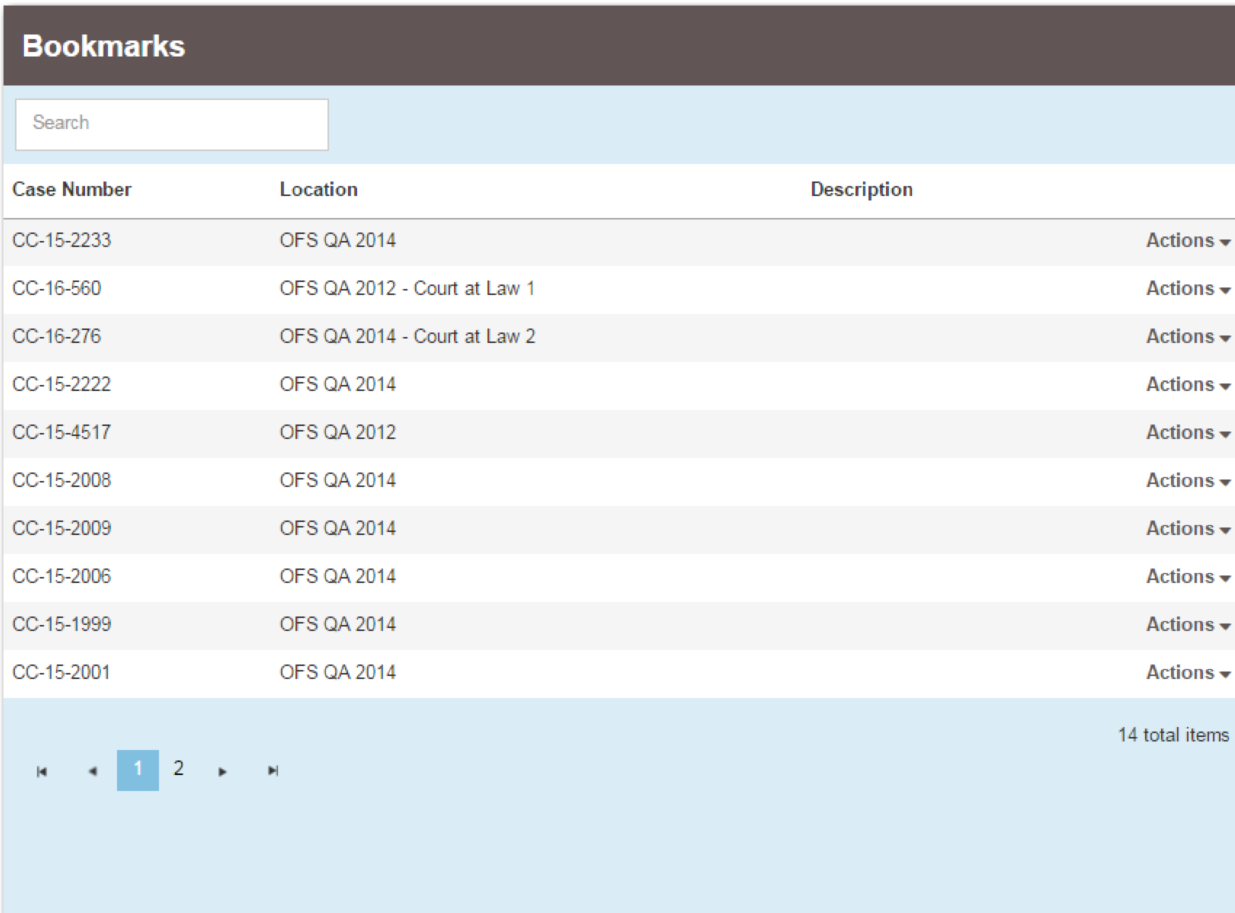


Figure 13.1 – Bookmarks Page

View Bookmarked Cases

You can view a list of your bookmarked cases, file into an existing case, remove the bookmarked case from the case list, and add service contacts to the case using the *Bookmarks* page.

Filing into an Existing Case

To file into an existing case, select **File Into Case** from the **Actions** drop-down list on the *Bookmarks* page.

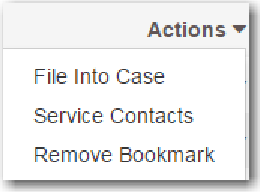


Figure 13.2 – Bookmarks Actions Drop-Down List

Removing a Case from the Bookmark List

You can remove a case from the bookmarked case list by selecting **Unbookmark this case** from the **Actions** drop-down list on the *Bookmarks* page.

Add Service Contact to the Case

You can add service contacts to the selected case by selecting **Service Contacts** from the **Actions** drop-down list on the *Bookmarks* page. The *Service Contacts* dialog box for the specified case is displayed. From here, you can add a service contact from the firm's service contact list, add a service contact from the public list, or create a new service contact.

Chapter 14 Reports

Topics Covered in This Chapter

Creating a Financial Reconciliation Report

The Financial Reconciliation Report contains a report at the **Envelope** level that is designed to help filers reconcile their filing fees to their credit card statements.

To run a financial reconciliation report, perform the following steps:

1. From the **Actions** drop-down list, select **Reports**.

   The *Reports* page is displayed.

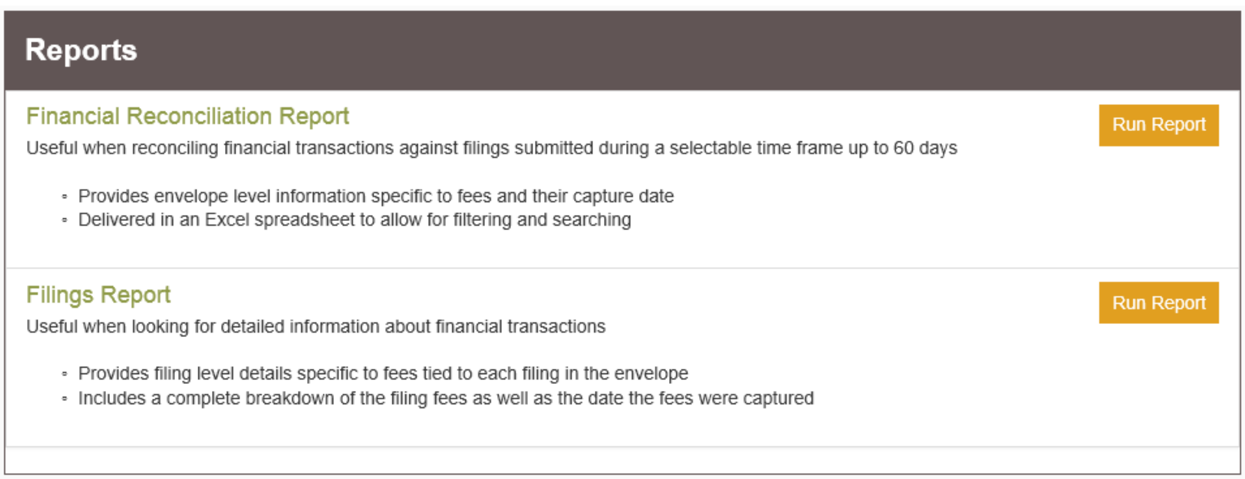


Figure 14.1 – Reports Page

2. In the **Financial Reconciliation Report** panel, click 

.

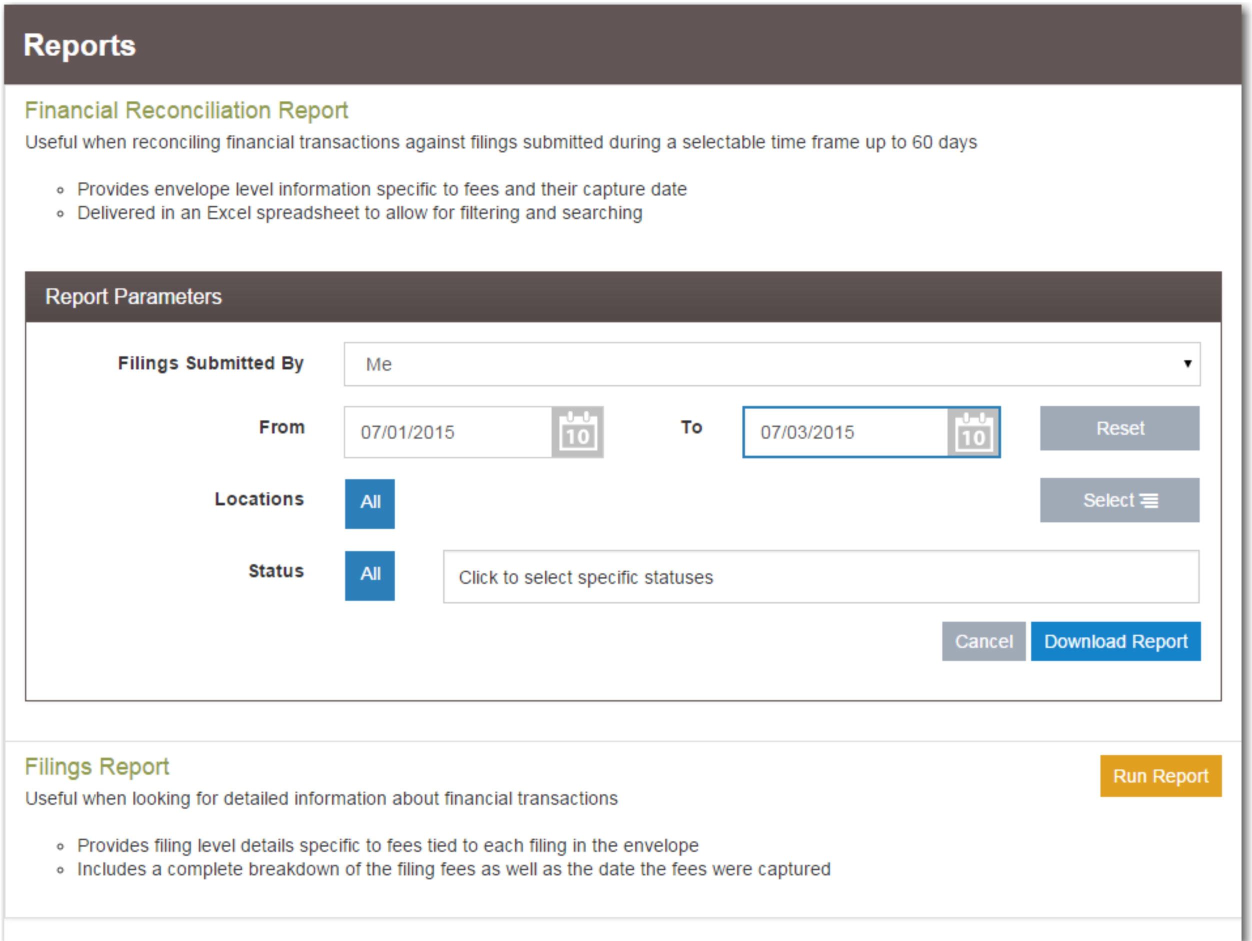


Figure 14.2 – Report Parameters Panel of Reports Page for Financial Reconciliation Report

3. In the **Report Parameters** panel, enter the report information in the fields provided:

   a. From the **Filings Submitted By** drop-down list, select either **Me** or **My Firm**.

   b. In the **From** and **To** date fields, click  to select the report date range from a calendar. Or, type the dates manually (for example, `7/31/2015`).

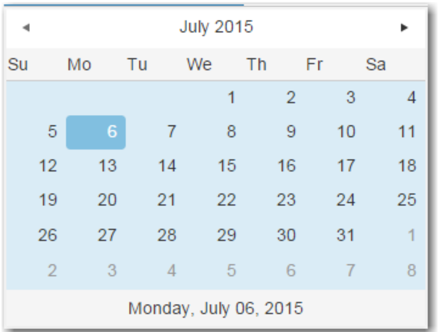


Figure 14.3 – Filter Date Calendar

c. In the **Locations** field, select **All** (default), or select one or multiple locations from the list.

d. In the **Status** field, select **All** (default), or select one or multiple statuses from the list.

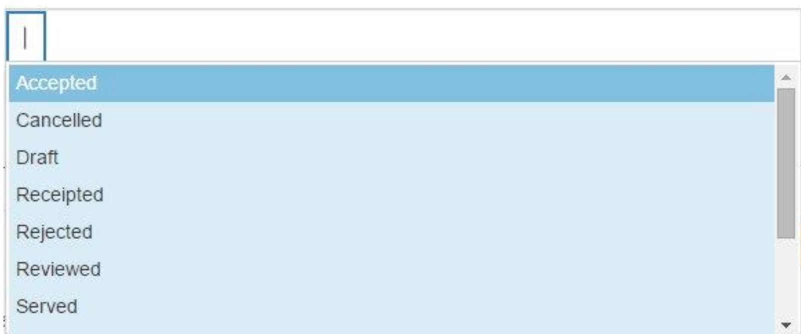
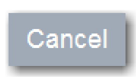


Figure 14.4 – Status Field Drop-Down List

4. Click  to run the report, or click  to cancel the action.
5. Open the report in Microsoft Excel, or save the report to another location.

Creating a Filings Report

The Filings Report is a detailed look into every filing, filing status, and fee associated with the filings you or your firm performed.

To create the Filings Report, perform the following steps:

1. From the **Actions** drop-down list, select **Reports**.

   The *Reports* page is displayed.

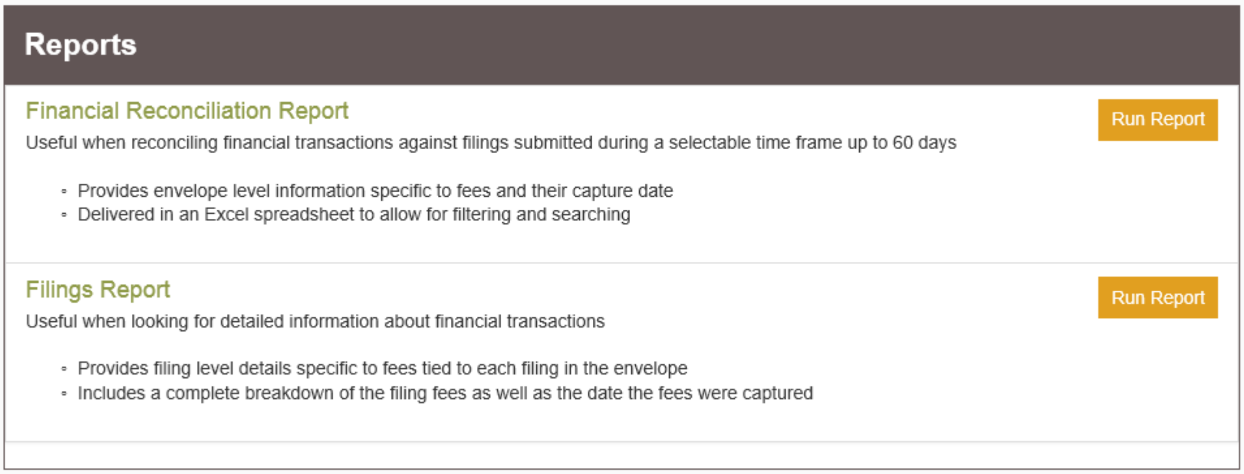


Figure 14.5 – Reports Page

2. In the **Filings Report** panel, click 

.

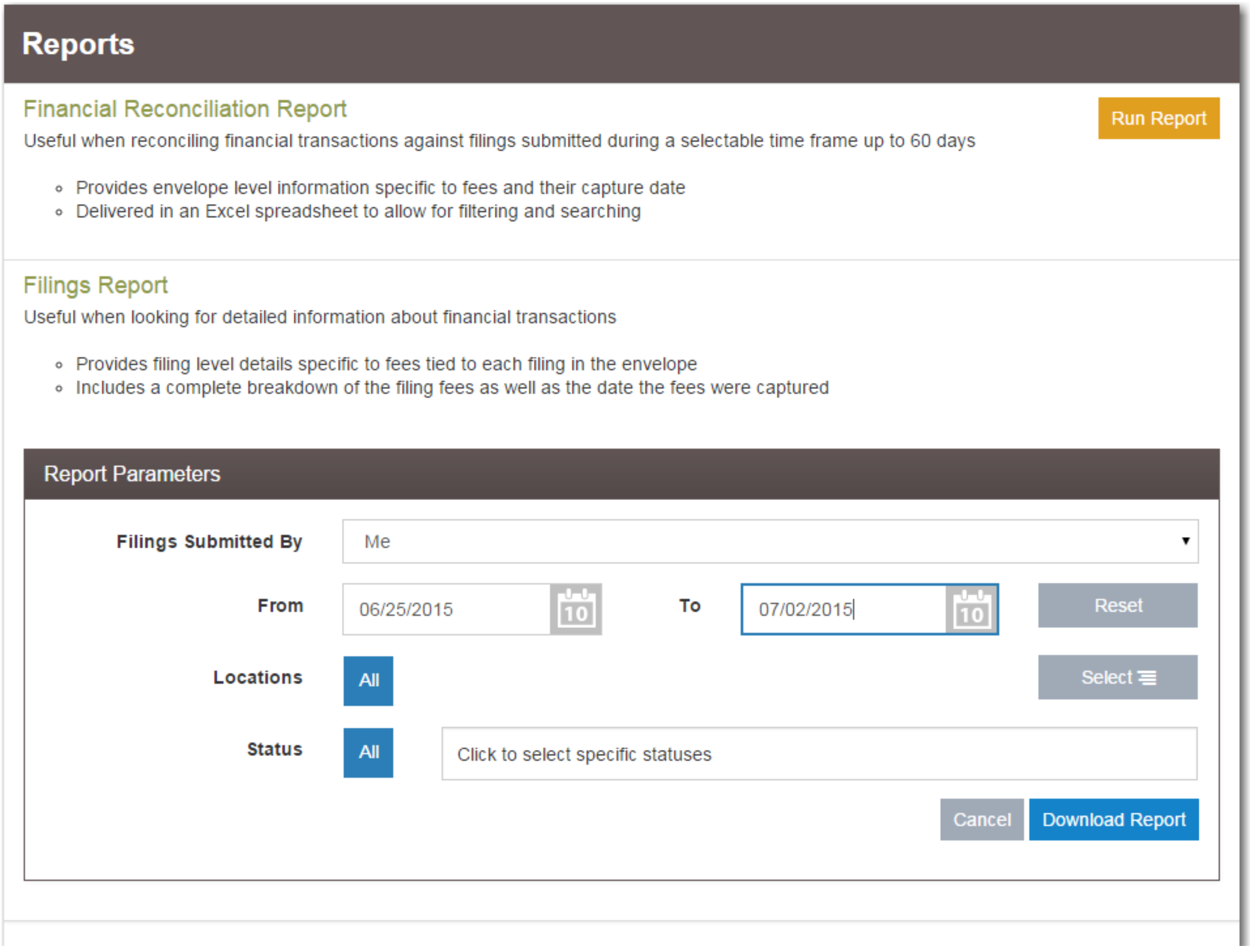


Figure 14.6 – Report Parameters Panel of Reports Page for Filings Report

3. In the **Report Parameters** panel, enter the report information in the fields provided:

   a. From the **Filings Submitted By** drop-down list, select either **Me** or **My Firm**.

   b. In the **From** and **To** date fields, click  to select the report date range from a calendar. Or, type the dates manually (for example, `7/31/2015`).

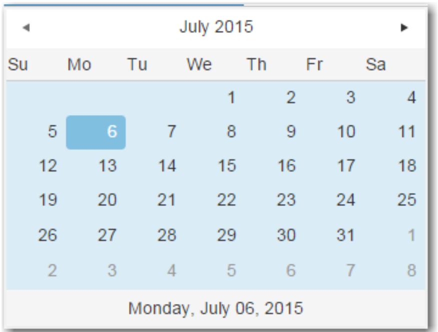


Figure 14.7 – Filter Date Calendar

c. In the **Locations** field, select **All** (default), or select one or multiple locations from the list.

d. In the **Status** field, select **All** (default), or select one or multiple statuses from the list.

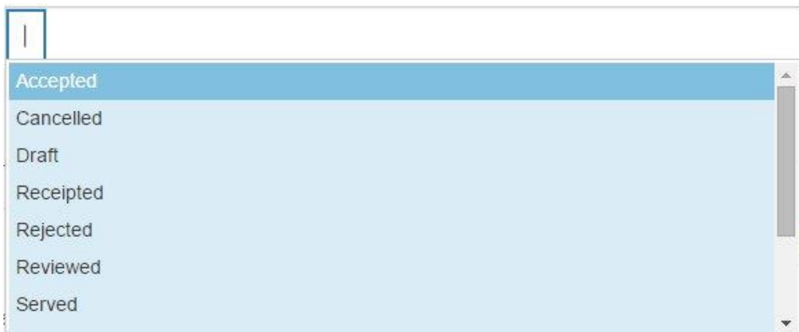


Figure 14.8 – Status Field Drop-Down List

4. Click 

to run the report, or click 

to cancel the action.
5. Open the report in Microsoft Excel, or save the report to another location.

CHAPTER 15 TYLER TECHNOLOGIES TECHNICAL SUPPORT CONTACT INFORMATION

For assistance, contact Tyler Technologies through the following resources.

Resource	Contact Information
Odyssey File & Serve Support Hours	7 am to 9 pm (CT), Monday through Friday
Odyssey File & Serve Support Chat	Assistance is also available online through Support Chat.
Odyssey File & Serve Email	efiling.support@tylertech.com
Odyssey File & Serve Telephone	800.297.5377
GoTo Assist (Support)	Support may ask to assist you by sharing your screen using GoToAssist.