



Odyssey File & Serve™ HTML5

Firm User Guide – Release 3.16

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CHAPTER 1 SYSTEM OVERVIEW

TOPICS COVERED IN THIS CHAPTER

- ◆ RELEASE 3.16 NEW FEATURES
- ◆ BEFORE YOU BEGIN

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.

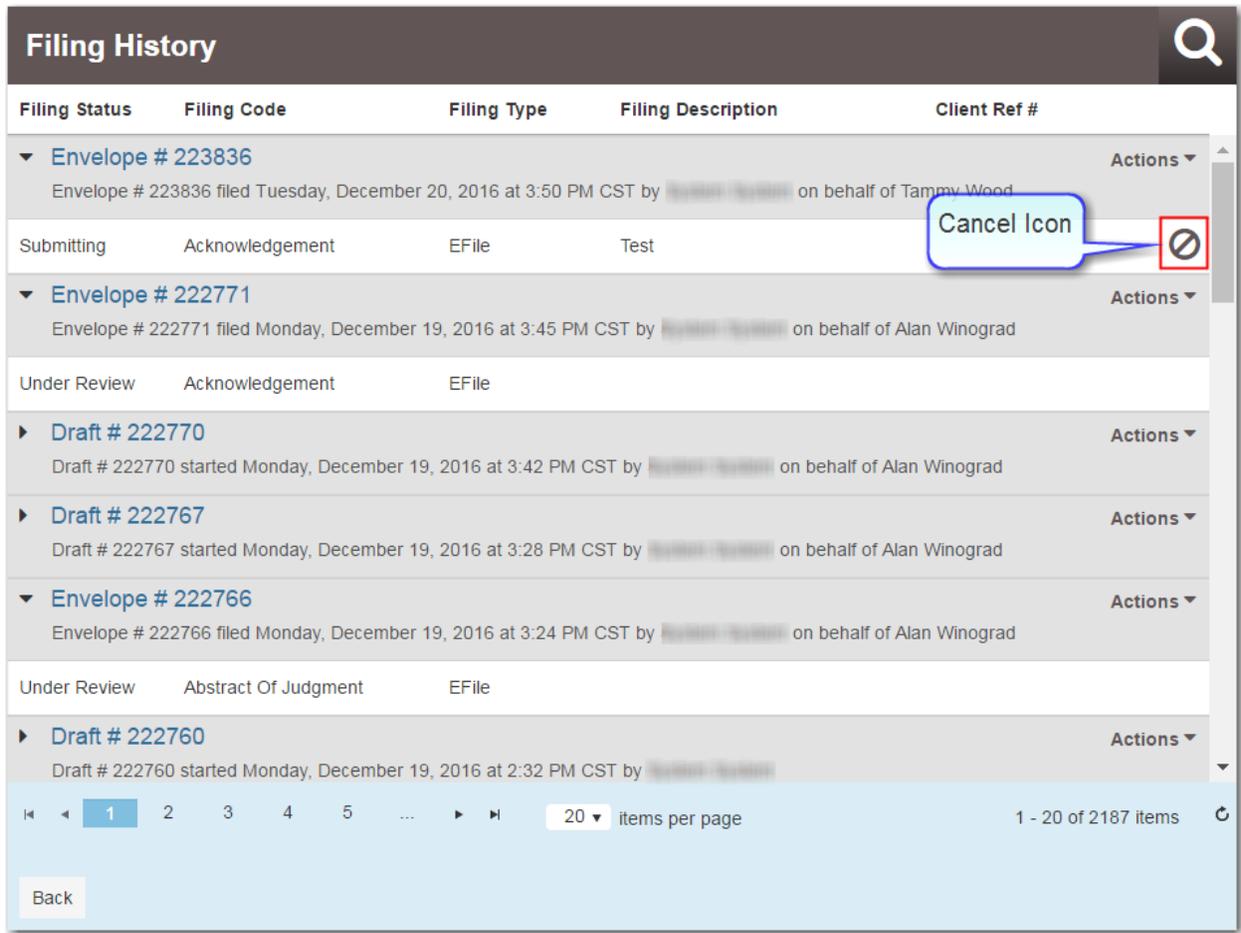


Figure 1.1 – Filing History Page with the Cancel Icon

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.

- i Note:** The **Date of Birth** field is configured by Tyler and may not be available on your system.
- i Note:** The **Date of Birth** field is displayed only when filers are adding a new party.

The screenshot shows a web form titled "Party Information". At the top, there is a table with columns "Party Type", "Party Name", and "Lead Attorney". The first row contains "Defendant", "John Doe", and "Thomas Crump". To the right of the table is a "Required Party" dropdown and an "Add Another Party" button. Below the table, there is a section "Enter details for this Party" with a checkbox "Party is a Business/Agency". The form contains several input fields: "First Name" (John), "Middle Name" (empty), "Last Name" (Doe), "Suffix" (dropdown), "Email Address" (j.doe@gmail.com), "Date of Birth" (3/14/1991, highlighted with a red box and a "New" callout), "Country" (United States of America), "Address Line 1" (123 Main Street), "Address Line 2" (empty), "City" (AnyCity), "State" (Texas), "Zip Code" (75229), "Phone Number" (2145551222), and "Filer ID" (empty). At the bottom, there is a "Lead Attorney" dropdown (Thomas Crump) and an "Additional Attorneys" section with an "Add Attorneys" button. "Undo" and "Save Changes" buttons are at the bottom right.

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**.

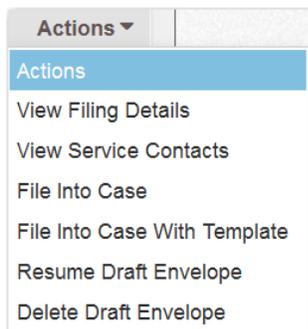


Figure 1.4 – Actions Drop-Down List

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

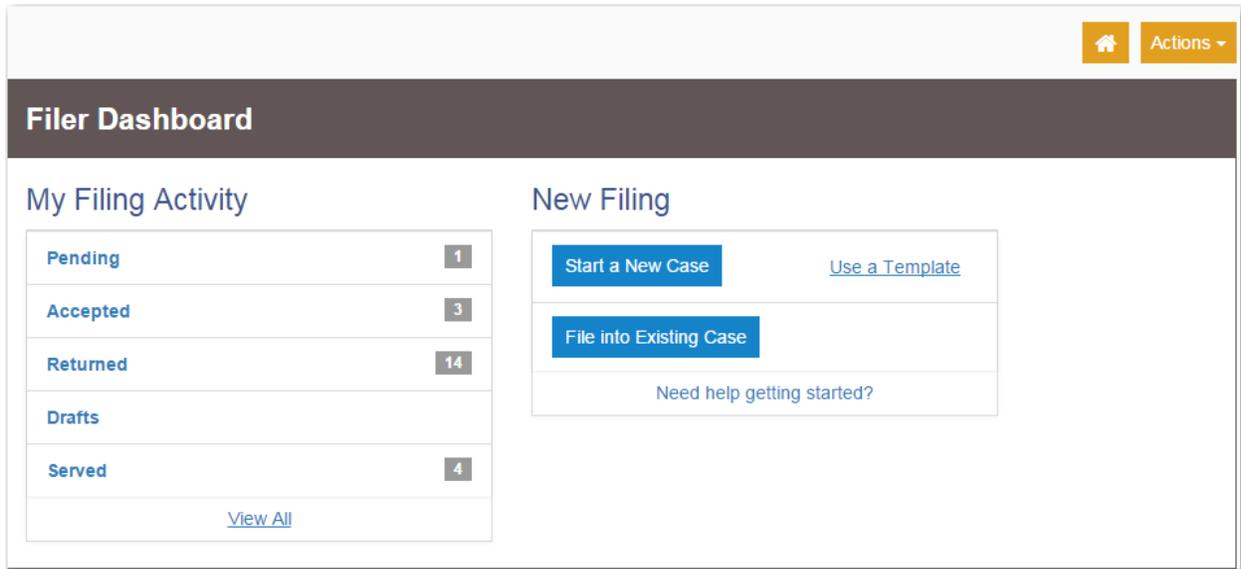


Figure 1.5 – Filer Dashboard Page

From the **Actions** drop-down list

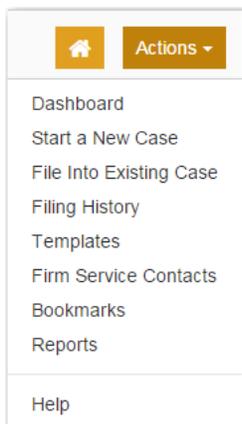


Figure 1.6 – Actions Drop-Down List

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.

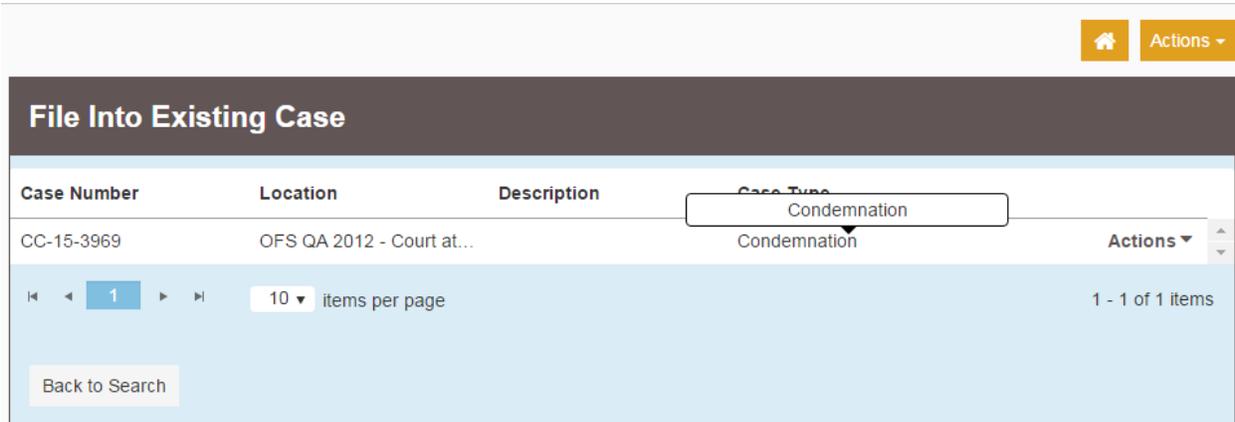


Figure 1.7 – File Into Existing Case Page with Tooltip Displayed

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.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
▶	Draft # 211942				Actions ▼
	Draft # 211942 started Thursday, December 01, 2016 at 3:43 PM CST by Individual Filer				
▼	Draft # 211941				Actions ▼
	Draft # 211941 started Thursday, December 01, 2016 at 2:39 PM CST by Individual Filer				
Draft	Acknowledgement	EFile	Malpractice Malpractice		⊘
▼	Draft # 211940				Actions ▼
	Draft # 211940 started Thursday, December 01, 2016 at 1:52 PM CST by Individual Filer				
Draft	Acknowledgement	EFile			⊘
▼	Draft # 203657				Actions ▼
	Draft # 203657 started Tuesday, November 15, 2016 at 12:59 PM CST by Individual Filer				
▼	Draft # 201549				Actions ▼
	Draft # 201549 started Friday, November 11, 2016 at 1:15 PM CST by Individual Filer				
Draft	Acknowledgement - No Do...	EFile			⊘
▶	Draft # 201548				Actions ▼
◀ 1 2 3 4 5 ▶▶ 20 items per page					1 - 20 of 85 items
Back					

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.



Templates			
Search		⊕ New Template	
Favorite	Name	Type	
☆	District Court Filings	New Case	Actions ▾
☆	Family Law	Existing Case	Actions ▾

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.

Bookmarks		
<input type="text" value="Search"/>		
Case Number	Location	Description
CC-15-2233	OFS QA 2014	Actions ▾
CC-16-560	OFS QA 2012 - Court at Law 1	Actions ▾
CC-16-276	OFS QA 2014 - Court at Law 2	Actions ▾
CC-15-2222	OFS QA 2014	Actions ▾
CC-15-4517	OFS QA 2012	Actions ▾
CC-15-2008	OFS QA 2014	Actions ▾
CC-15-2009	OFS QA 2014	Actions ▾
CC-15-2006	OFS QA 2014	Actions ▾
CC-15-1999	OFS QA 2014	Actions ▾
CC-15-2001	OFS QA 2014	Actions ▾

14 total items

◀ 1 2 ▶

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.

Reports	
<p>Financial Reconciliation Report</p> <p>Useful when reconciling financial transactions against filings submitted during a selectable time frame up to 60 days</p> <ul style="list-style-type: none">• Provides envelope level information specific to fees and their capture date• Delivered in an Excel spreadsheet to allow for filtering and searching	Run Report
<p>Filings Report</p> <p>Useful when looking for detailed information about financial transactions</p> <ul style="list-style-type: none">• Provides filing level details specific to fees tied to each filing in the envelope• Includes a complete breakdown of the filing fees as well as the date the fees were captured	Run Report

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.

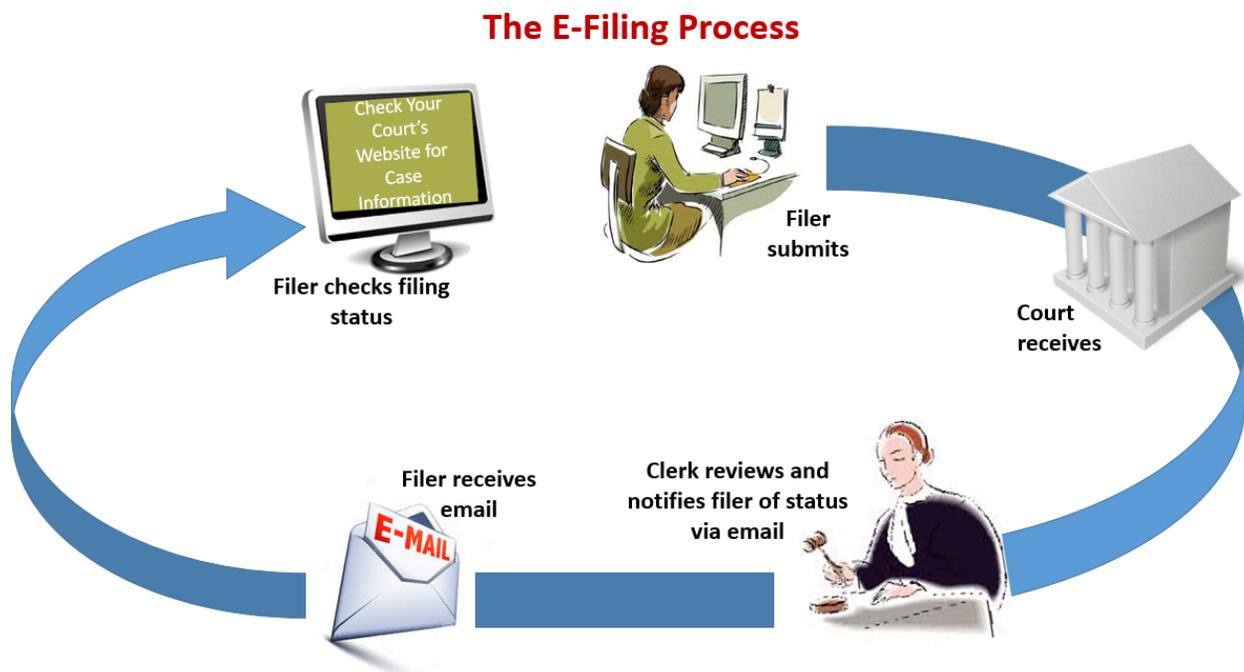


Figure 2.1 – The E-Filing Process

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.

i 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.
Received	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 <i>Details</i> 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.

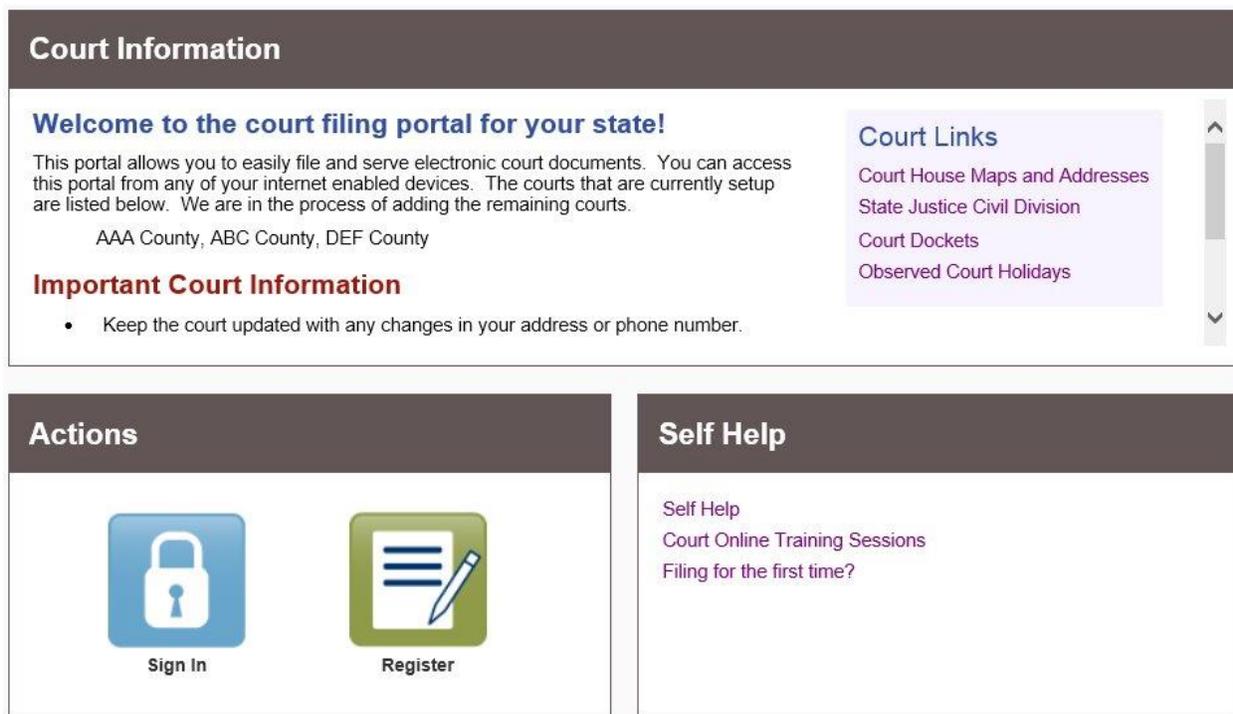


Figure 3.1 – File & Serve Home Page

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://PLADVSVOFSAN01//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**.

Register

[User Information](#) » [Firm Information](#) » [Terms and Conditions](#) » [Complete](#)

First Name

Middle

Last Name

Email Address

Password

Security Question

Enter a simple question that can only be answered by you. Example: High School Mascot

Security Answer

Next

Figure 3.3 – Register Page for Firm User

3. Click  .

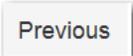
The next page is displayed, showing the firm you were invited to join.

The screenshot shows a registration page titled "Register" with a dark header. Below the header, a breadcrumb trail reads "User Information » Firm Information » Terms and Conditions » Complete". A message box states "You were invited to join the following firm:" with a link "Not your firm?". The "Firm Information" section lists the following details:

Firm Name	Tyler Tech Veigl		
Address Line 1	5101 Tennyson		
Address Line 2			
City	Plano	State	Texas
Country			
Zip Code	75024	Phone Number	9866666666

At the bottom of the form, there are two buttons: "Previous" (disabled) and "Next" (active).

Figure 3.4 – Register Page with Firm Information

4. Click  to continue with your registration, or click  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.

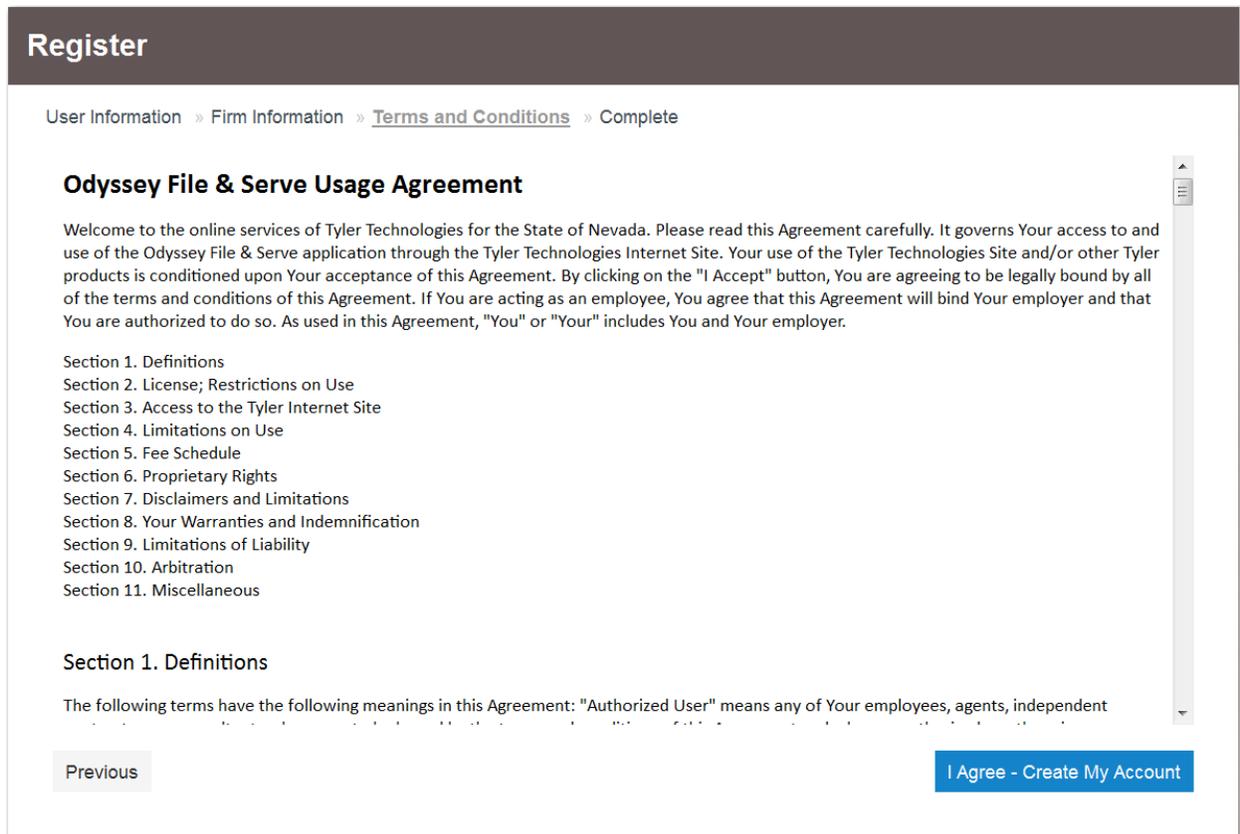


Figure 3.5 – Register Page with Usage Agreement

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.

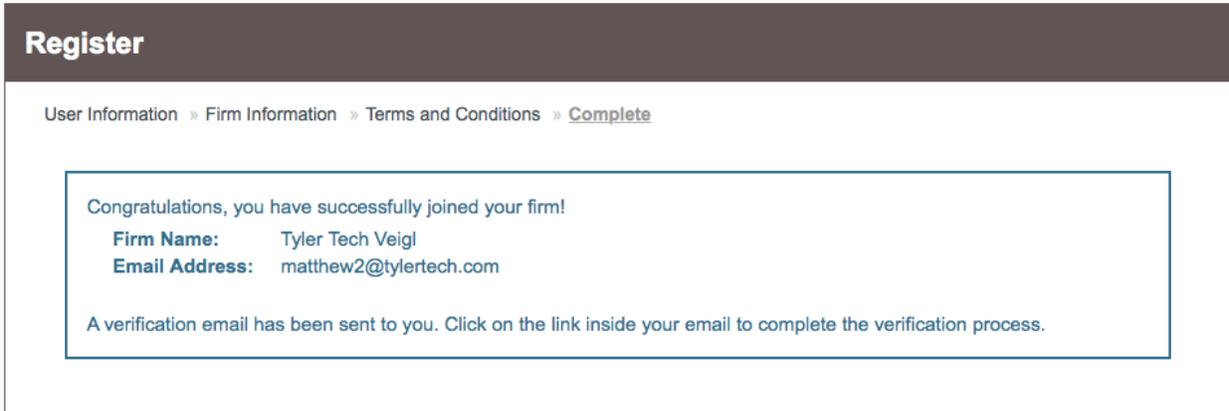


Figure 3.6 – Register Page with Confirmation

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.

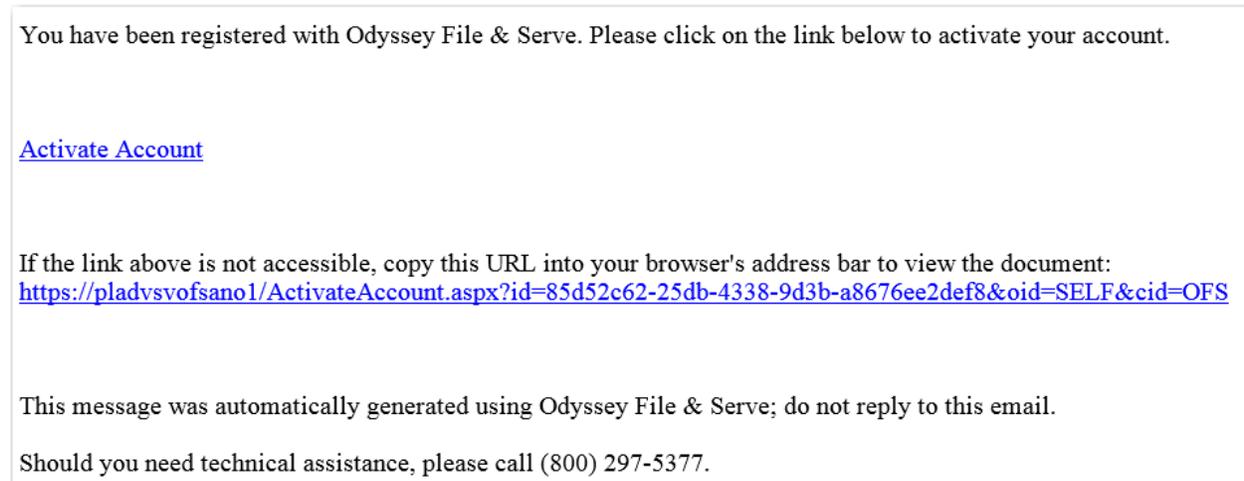


Figure 3.7 – Verification Email

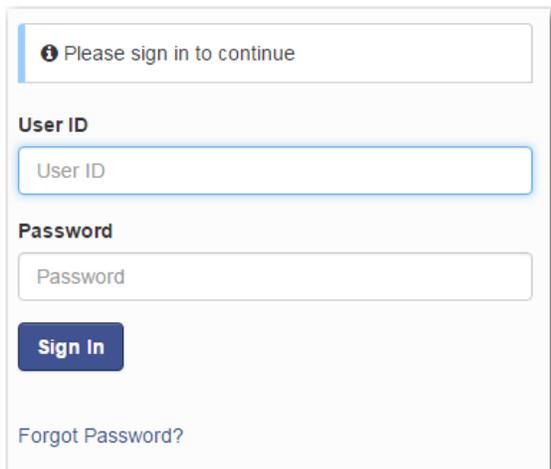
Your registration is complete. Navigate to the home page to log on.

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.



The image shows a sign-in form with a message at the top: "Please sign in to continue". Below this are two input fields: "User ID" and "Password". A blue "Sign In" button is positioned below the password field. At the bottom left of the form, there is a link that says "Forgot Password?".

Figure 3.8 – Sign In Page

3. Click  .

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



The image shows a page with the Tyler Technologies logo at the top, which includes the text "tyler technologies Empowering people who serve the public™". Below the logo, it says "Please enter the email address associated with your account." There is an input field labeled "Email Address" and a "Next" button below it.

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  .

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

- ◆ SIGNING IN
- ◆ SIGNING OUT

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.

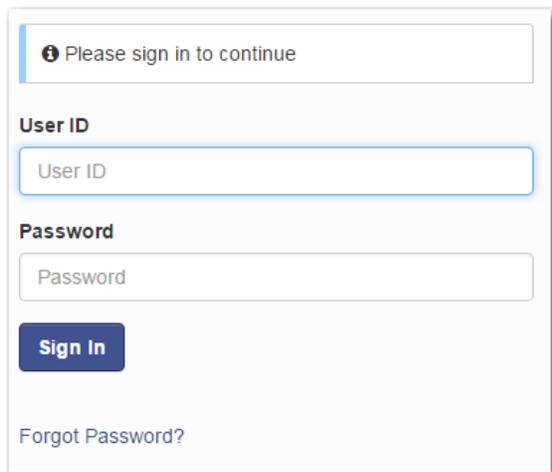
A screenshot of a web form for signing in. At the top, there is a message box that says "Please sign in to continue". Below this, there are two input fields: "User ID" and "Password". A blue "Sign In" button is positioned below the password field. At the bottom of the form, there is a link that says "Forgot Password?".

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**.

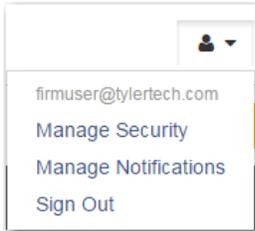


Figure 4.2 – Sign Out Option on Profile Drop-Down List

The *Sign Out* page is displayed.

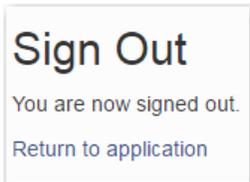


Figure 4.3 – Sign Out Page

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

CHAPTER 5 PROFILE PREFERENCES

TOPICS COVERED IN THIS CHAPTER

- ◆ CHANGING THE USER PASSWORD
- ◆ CHANGING THE SECURITY QUESTION
- ◆ MANAGING NOTIFICATIONS

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**.

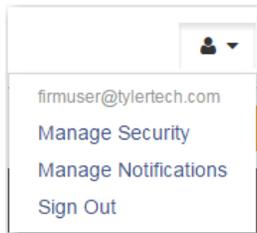


Figure 5.1 – Profile Drop-Down List

The *Manage Security* page is displayed.

The screenshot shows the 'Manage Security' page with two main sections:

- Change Password:** Contains three input fields: 'Old Password', 'New Password', and 'Re-enter New Password'. At the bottom right are 'Undo' and 'Save Changes' buttons.
- Change Security Question:** Contains a message box: 'You must enter your password in order to update your security question and/or answer.' Below this are three input fields: 'Security Question' (with the text 'Name of my heart dog?'), 'Security Answer', and 'Current Password'. At the bottom right are 'Undo' and 'Save Changes' buttons.

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  to change your password, or click  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**.

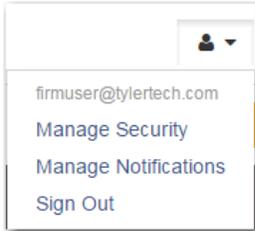


Figure 5.3 – Profile Drop-Down List

The *Manage Security* page is displayed.

The screenshot shows the 'Manage Security' page. It has a dark header with the title 'Manage Security'. Below the header is a section titled 'Change Password' with three input fields: 'Old Password', 'New Password', and 'Re-enter New Password'. At the bottom right of this section are 'Undo' and 'Save Changes' buttons. The next section is 'Change Security Question'. It starts with a message box: 'You must enter your password in order to update your security question and/or answer.' Below this are three input fields: 'Security Question' (containing 'Name of my heart dog?'), 'Security Answer', and 'Current Password'. At the bottom right of this section are 'Undo' and 'Save Changes' buttons.

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  to change your security information, or click  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.

The screenshot shows the 'Manage Notifications' page with a dark header. Below the header, the title 'Manage Notifications' is displayed. Underneath, there is a section titled 'Email Notifications' with the instruction 'Select the email notifications that you wish to receive.' There are six notification options, each with a checked checkbox: 'Filing Accepted', 'Filing Rejected', 'Filing Submitted', 'Service Undeliverable', 'Filing Submission Failed', and 'Filing Received'. At the bottom right of the form, there are two buttons: 'Undo' and 'Save Changes'.

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 Received**.

3. Click  to save your notification selection, or click  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.

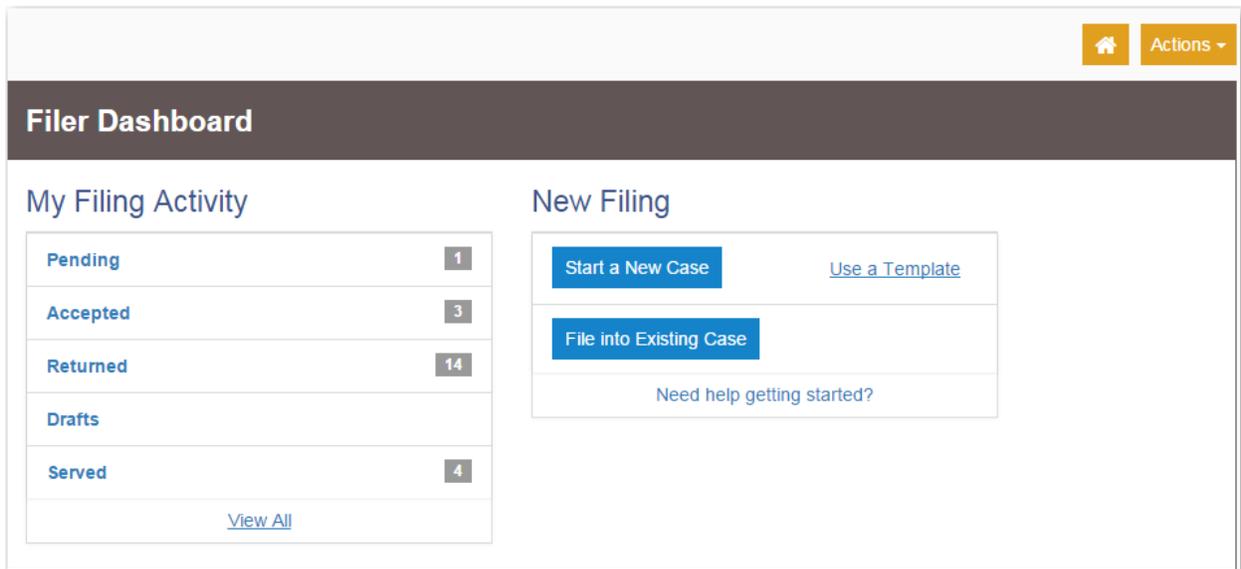


Figure 6.1 – Filer Dashboard Page

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
- ◆ DRAW DOWN ACCOUNT USER INTERFACE

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](#).

The screenshot shows a window titled "Fees" with a "Proposed Order" section. It lists fees: Filing Fee (\$0.00), Total Filing Fee (\$0.00), E-File Fee (\$1.00), and Court E-File Fee (\$1.00), with an Envelope Total of \$2.00. Below the fees, there are four dropdown menus: "Payment Account" (with a red border and a blue link "View Unavailable Payment Accounts" below it), "Party Responsible for Fees", "Filing Attorney", and "Filer Type" (set to "Default"). At the bottom right are "Undo" and "Save Changes" buttons.

Description	Amount
Filing Fee	\$0.00
Filing Total:	\$0.00
<hr/>	
Total Filing Fee	\$0.00
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total:	\$2.00

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.

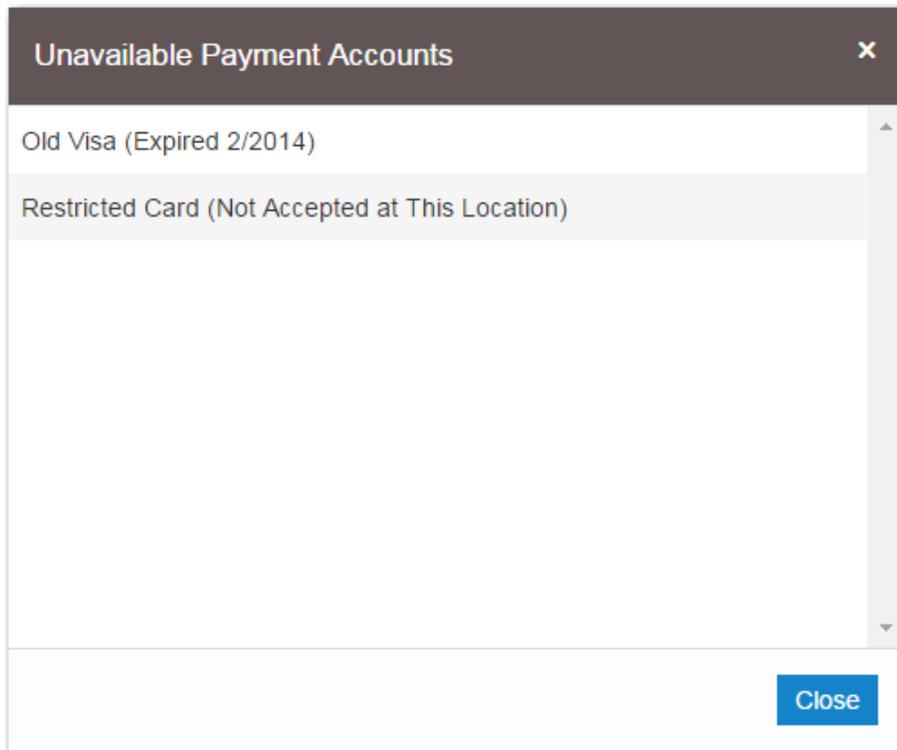


Figure 7.2 – Unavailable Payment Accounts Window

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.

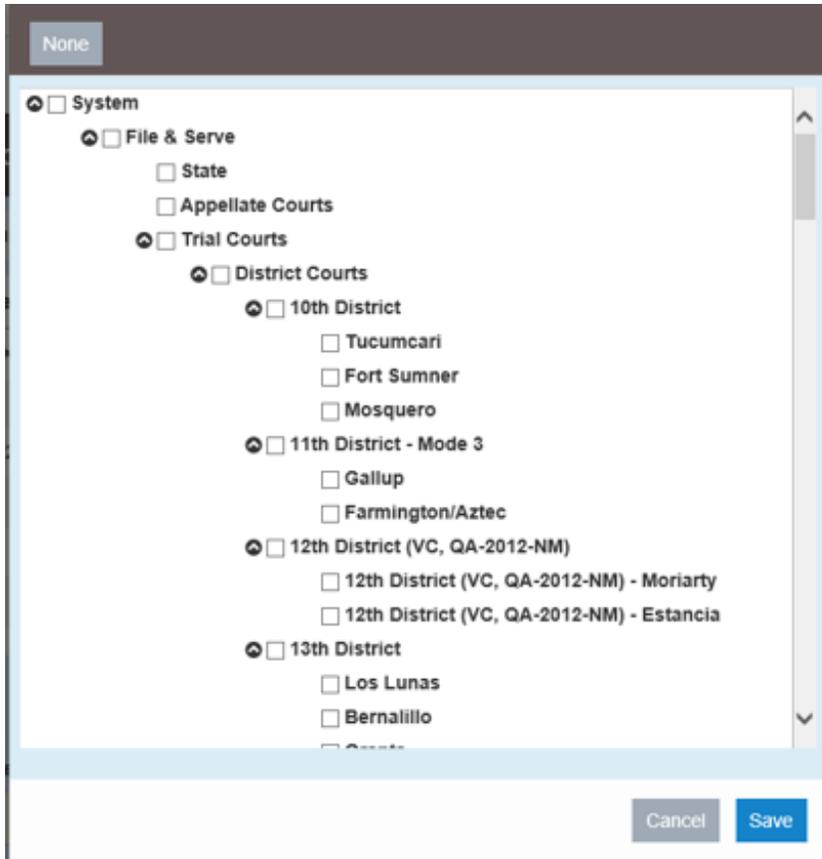


Figure 7.3 – Draw Down Account with Parent-Child Relationship of Courts

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.

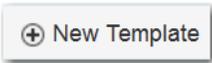
To create a new template, perform the following steps:

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.

New Template

Template Information

Template Name

Favorite 

New Case Existing Case

Undo Save Changes

Case Information +

Party Information +

Filings +

Fees +

Back Continue

Figure 8.2 – New Template Page

- 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.

Template Information

Template Name

Favorite 

New Case Existing Case

Undo Save Changes

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).

Template Information

Template Name

Favorite

New Case Existing Case

Undo Save Changes

Figure 8.4 – Template Information Section with Existing Case Option Selected

4. Click  to save your changes, or click  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.

Case Information

Location

Refine Location

Category

Case Type

Undo Save Changes

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.

Party Information

Party Type	Party Name	Lead Attorney
Defendant	John Doe	Thomas Crump

Required Party Add Another Party

Enter details for this Party

Party is a Business/Agency

First Name: John Middle Name: Last Name: Doe Suffix:

Email Address: j.doe@gmail.com Date of Birth: 3/14/1991

Country: United States of America

Address Line 1: 123 Main Street Address Line 2:

City: AnyCity State: Texas

Zip Code: 75229 Phone Number: 2145551222 Filer ID:

Lead Attorney: Thomas Crump

Additional Attorneys:

Figure 8.6 – Party Information Section

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

The screenshot shows a 'Filings' window with the following sections:

- Enter the details for this filing**
 - Filing Type:** EFile
 - Filing Code:** Acknowledgement
- Filing Description:** (Empty text box)
- Client Reference Number:** (Empty text box with info icon)
- Comments to Court:** (Empty text box)
- Courtesy Copies:** (Empty text box with info icon)
- Preliminary Copies:** (Empty text box with info icon)
- Due Date:** (Empty date picker with 'TO' icon)
- Filing on Behalf of:** (Text: *Select the parties you are filing on behalf of)

Lead Document (Required)

- Computer:** (Upload button)
- Cloud:** (Drop-down menu with icons for Google Drive, OneDrive, and Dropbox, plus an info icon)

Attachments

- Computer:** (Upload button)
- Cloud:** (Drop-down menu with icons for Google Drive, OneDrive, and Dropbox, plus an info icon)

Optional Services and Fees

Optional Services and Fees	Fee Amount	Quantity	Fee Total
+ Add Optional Services and Fees			

Buttons: Undo, Save Changes

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.

The screenshot shows a web form titled "Filings" with the instruction "Enter the details for this filing". The form contains several fields: "Filing Type" (set to "EFile"), "Filing Description", "Client Reference Number", and "Courtesy Copies". The "Filing Code" field is open, displaying a list of options: "Click to select Filing Code", "A Non-Docketed Event", "Abstract Of Judgment - \$4.00", "Acknowledgement", "Acknowledgement - No Docs Required", and "Acknowledgement Of Paternity - \$10.50".

Figure 8.8 – Filing Code Drop-Down List

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

The screenshot shows the same "Filings" form, but now the "Filing Code" field is closed and displays the selected option: "Abstract Of Judgment - \$4.00".

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.

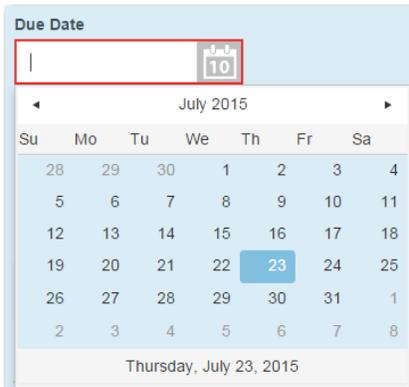


Figure 8.10 – Due Date Calendar

- 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.

The screenshot shows two sections: 'Lead Document (Required)' and 'Attachments'. Each section has a 'Computer' upload area with an upload icon and a 'Cloud' section with icons for Google Drive, Dropbox, and OneDrive, along with an information icon.

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.

The screenshot shows the 'Lead Document (Required)' section with a document titled 'AcademicCalendarSpring_test.pdf' (34.64 kB) and a description of 'Acknowledgement'. The 'Security' drop-down menu is open, displaying options: 'Click to select Security', 'General Document', 'Public (G)', and 'Sealed (G)'. Below this is the 'Attachments' section with a 'Computer' upload button.

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.

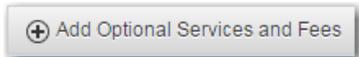
Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

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.

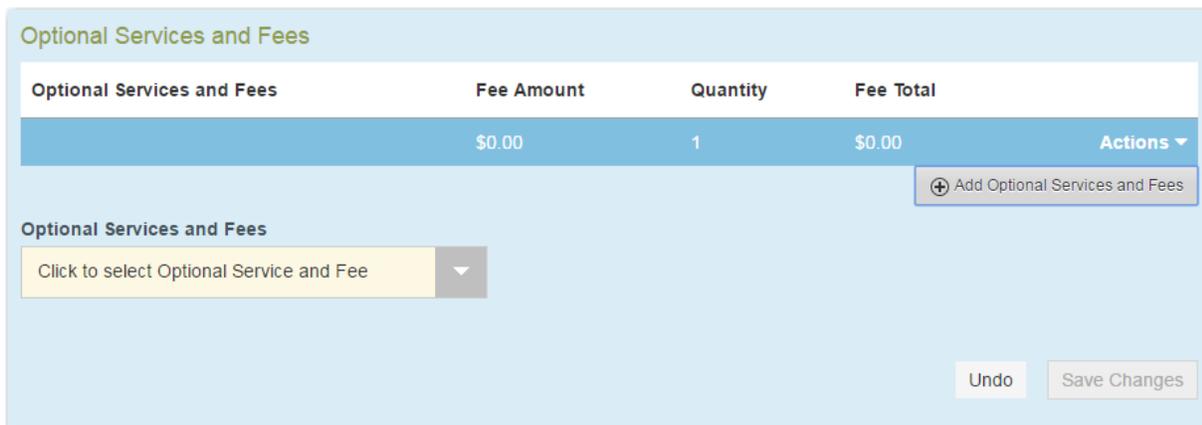


Figure 8.15 – Optional Services and Fees Field in the Optional Services and Fees Section

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

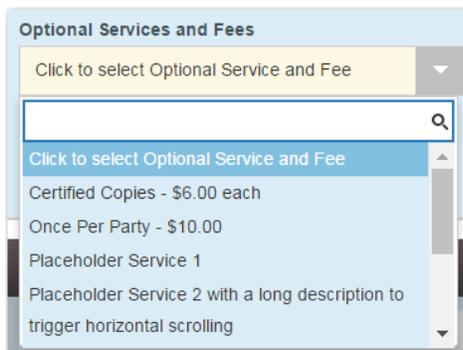


Figure 8.16 – Optional Services and Fees Drop-Down List

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.

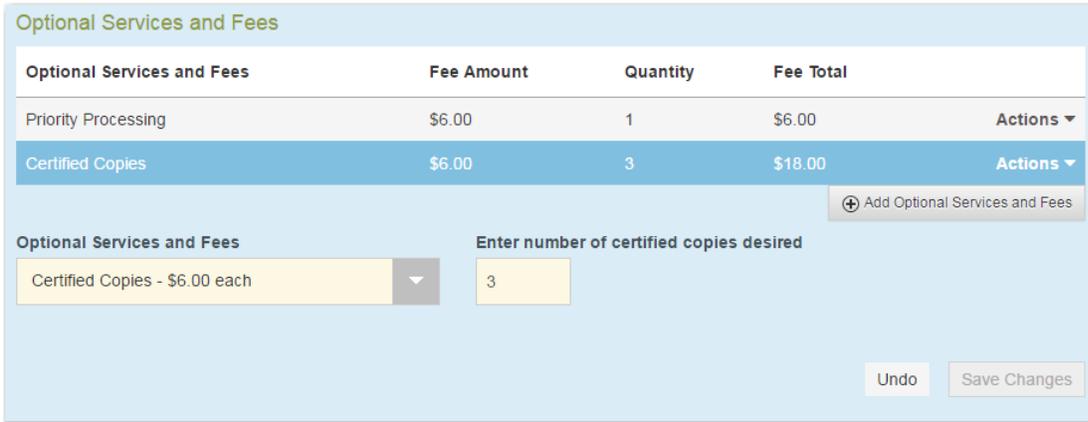


Figure 8.17 – Optional Services and Fees Section with Services Selected

- 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.

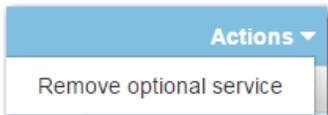


Figure 8.18 – Optional Service Actions Drop-Down List

- q. When you are done adding optional services, click

Save Changes



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.

Fees

▼ Proposed Order

Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	
Total Filing Fee	\$0.00
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total: \$2.00	

Payment Account

Click to select Payment Account

[View Unavailable Payment Accounts](#)

Party Responsible for Fees

Click to select Party Responsible for Fees

Filing Attorney

Click to select Filing Attorney

Filer Type

Default

Undo Save Changes

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.

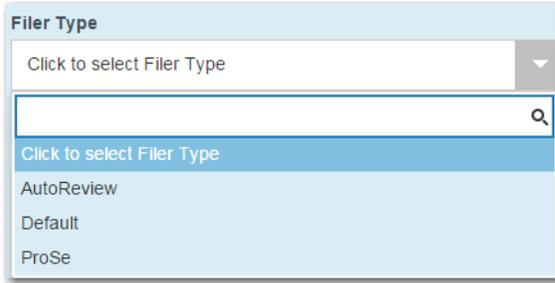


Figure 8.21 – Filer Type Drop-Down List

- 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.

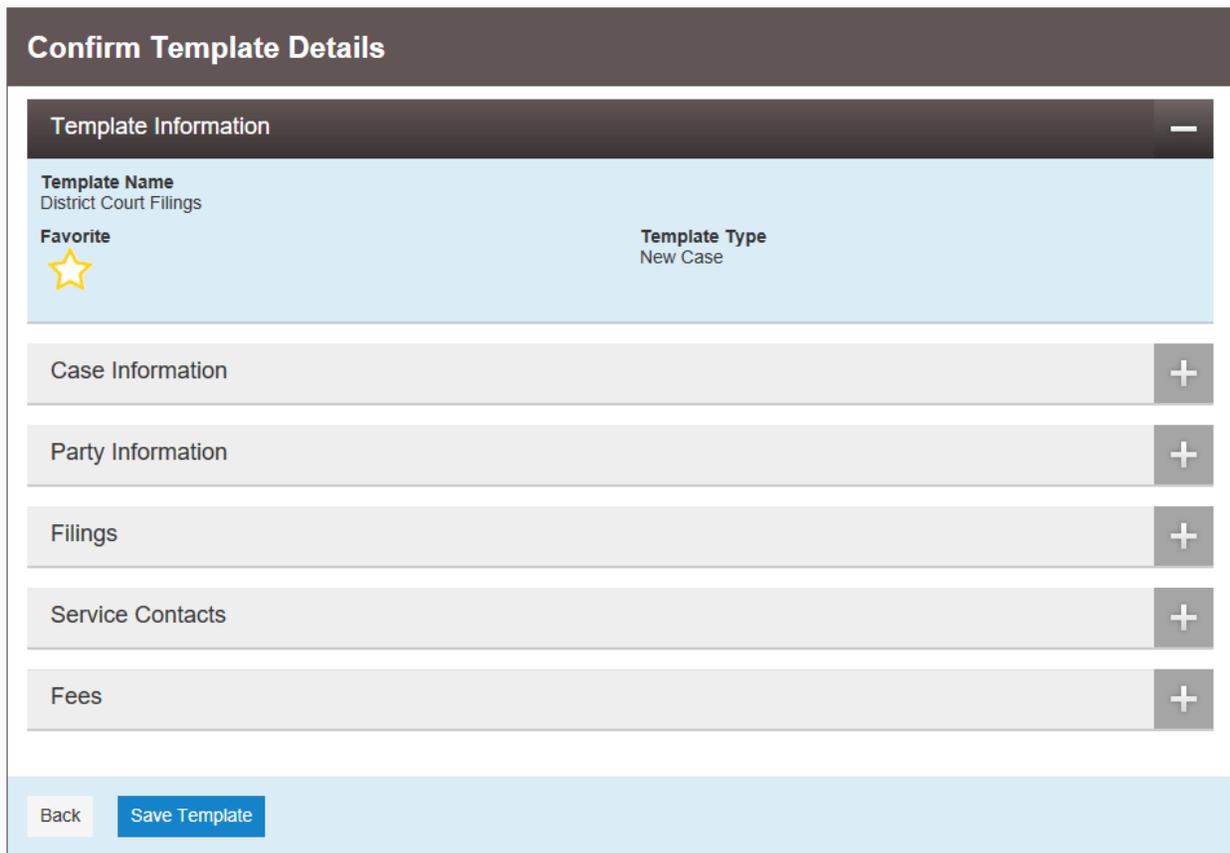


Figure 8.22 – Confirm Template Details Page

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.

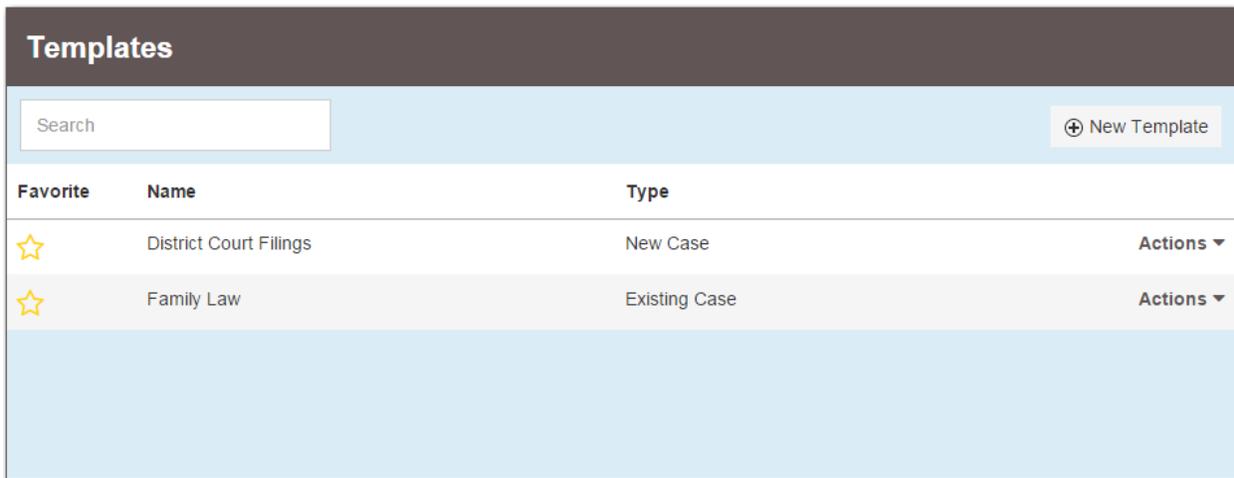
EDITING A TEMPLATE

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.



Templates			
Search			+ New Template
Favorite	Name	Type	
	District Court Filings	New Case	Actions ▾
	Family Law	Existing Case	Actions ▾

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 .

The *Confirm Template Details* page is displayed.

5. If you are satisfied with your changes to the template, click .

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  or .

If you click , the case is displayed for your review.

5. If you are satisfied with the case, click .

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**.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
▼	Case # CV-2016-019208 - Jimmy Green vs Example Defendant			Actions ▼	
Envelope # 164073 filed Thursday, April 28, 2016 at 2:22 PM CDT by Tyler FilerSrl					
Accepted	Motion	EFile			
▼	Case # CV-2016-044000 - Happy Farms vs Smiley Acres			Actions ▼	
Envelope # 164072 filed Monday, August 29, 2016 at 4:50 PM CDT by Tyler FilerSrl, Deferred Until 12:00 AM CDT					
Submission Fai...	Reponse	EFile			
▶	Draft # 164070			Actions ▼	
Draft # 164070 started Thursday, April 28, 2016 at 2:03 PM CDT by Tyler FilerSrl					
▼	Case # CC-16-462 (Judge, Civil)			Actions ▼	
Envelope # 164066 filed Thursday, April 28, 2016 at 1:55 PM CDT by Tyler FilerSrl					
Accepted	Acknowledgment	EFileAndServe			
▼	Case # CC-16-462 (Judge, Civil)			Actions ▼	
Envelope # 163057 filed Thursday, April 28, 2016 at 10:07 AM CDT by Tyler FilerSrl					
Accepted	Motion	EFile			
⏪ ◀ 1 ▶ ⏩ 20 items per page 1 - 8 of 8 items ↻					
Back					

Figure 8.25 – Filing History Page

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

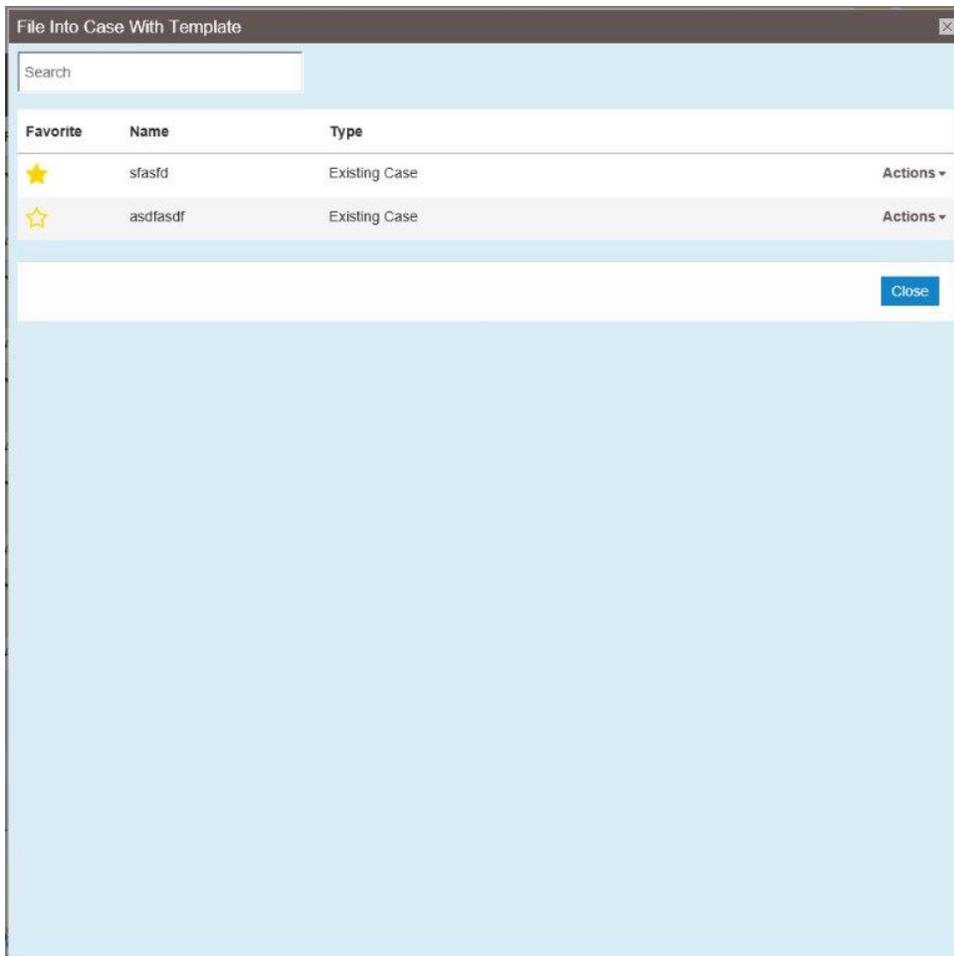


Figure 8.26 – File Into Case With Template Page

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**.

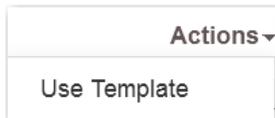


Figure 8.27 – Actions Drop-Down List for Existing Case Templates

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  displays a page that reflects your filing.

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

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.



Templates			
<input type="text" value="Search"/>			+ New Template
Favorite	Name	Type	
	District Court Filings	New Case	Actions ▾
	Family Law	Existing Case	Actions ▾

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.

Templates			
Search		⊕ New Template	
Favorite	Name	Type	
☆	District Court Filings	New Case	Actions ▾
☆	Family Law	Existing Case	Actions ▾

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

- ◆ FILING A NEW CASE
- ◆ ENTERING PARTY DETAILS
- ◆ DISPLAY “PRO SE” FOR PARTY NAME
- ◆ ENTERING FILING DETAILS
- ◆ COURT FEES FOR ADDITIONAL CASE PARTIES
- ◆ SUBMISSION AGREEMENTS
- ◆ VIEWING THE ENVELOPE SUMMARY

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.

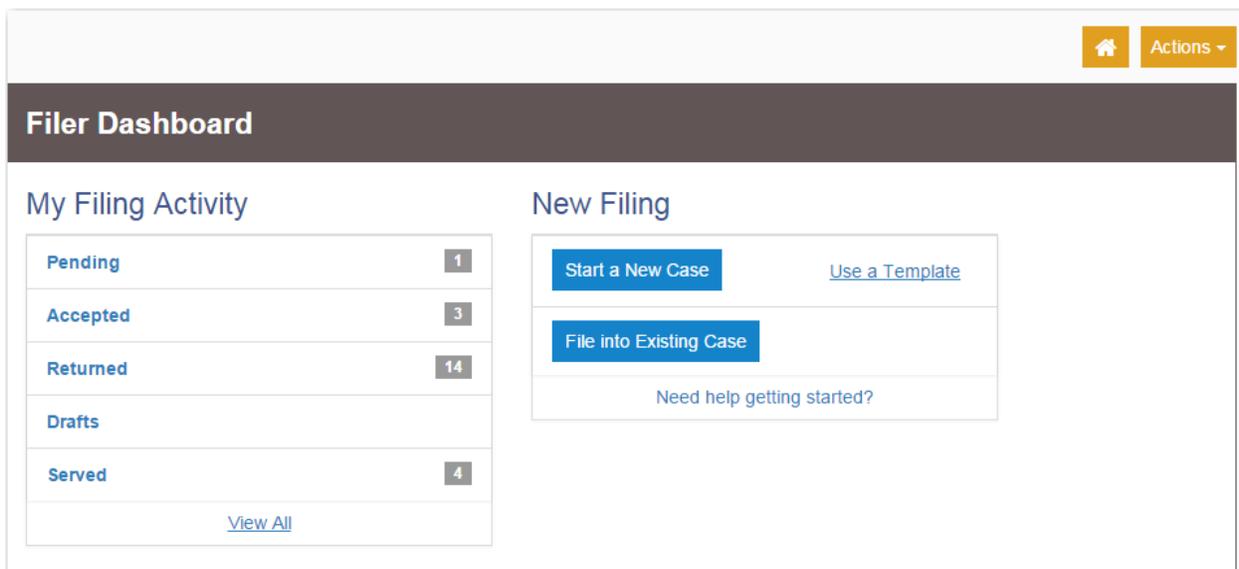


Figure 9.1 – Filer Dashboard Page

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**.
 - ❶ **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:
 - ❶ **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.

The screenshot shows a 'Case Information' window with four dropdown menus: 'Location' (OFS QA 2014), 'Refine Location' (OFS QA 2014 - Court at Law 2), 'Category' (Click to select Category), and 'Case Type' (Click to select Case Type). There are 'Undo' and 'Save Changes' buttons at the bottom right.

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.

Save Changes

3. After completing the required fields, click

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.

Party Information
—

Party Type	Party Name	Lead Attorney	
Defendant	John Doe	Thomas Crump	Required Party

+ Add Another Party

Enter details for this Party

Party is a Business/Agency

First Name

Middle Name

Last Name

Suffix

Email Address

Date of Birth

10

Country

Address Line 1

Address Line 2

City

State

Zip Code

Phone Number

i

Filer ID

Lead Attorney

Additional Attorneys

Add Attorneys

Undo
Save Changes

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

A rectangular button with a grey gradient background. The text "Add Attorneys" is centered in white, followed by a white hamburger menu icon (three horizontal lines).

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

The *Add Attorneys* dialog box is displayed.

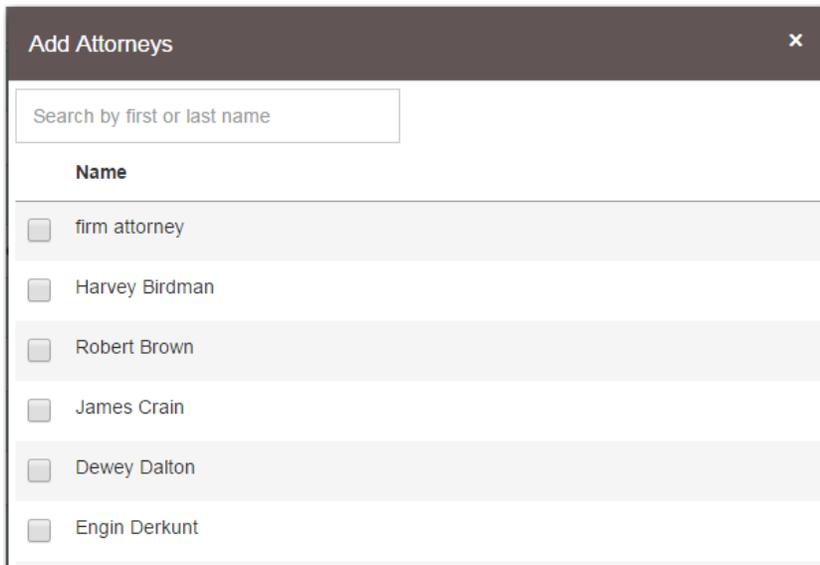


Figure 9.5 – Add Attorneys Dialog Box

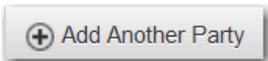
9. Select the check boxes for each attorney that you want to add to the case. When you are finished, click



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  , 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.

Party Information			
Party Type	Party Name	Lead Attorney	
Plaintiff	Melissa Jones	Perry Mason (+2 more)	Required Party ▲
Defendant	Mark Johnson	Abby Carmichael (+2 more)	Required Party ▼
			+ Add Another Party

Figure 9.7 – Party Information Section with Lead Attorneys Displayed

11. After completing the fields for all parties, click

[Save Changes](#)

i 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

Party Information			
Party Type	Party Name	Lead Attorney	
Plaintiff (QAJUD)	Joyce Simon	Pro Se	Required Party ▲
Defendant (QAJUD)	Martin Freed	Perry Mason	Required Party ▼
			+ Add Another Party

Figure 9.8 – Party Information Section on Case Filing Screen

- When viewing envelope details

Envelope # 166195

Envelope Information+

Case Information+

Party Information-

Party Type	Party Name	Lead Attorney
Plaintiff	Joyce Simon	Pro Se
Defendant	Martin Freed	

Filings+

Service Contacts+

Fees+

View Filing History
View Receipt

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.

Filings

Enter the details for this filing

Filing Type: EFile
Filing Code: Acknowledgement

Filing Description: [Text Area]

Client Reference Number: [Text Field] ⓘ
Comments to Court: [Text Field]

Courtesy Copies: [Text Field] ⓘ
Preliminary Copies: [Text Field] ⓘ

Due Date: [Date Picker]

Filing on Behalf of: *Select the parties you are filing on behalf of

Lead Document (Required)

Computer: [Upload Button] ⓘ
Cloud: [Drive Icons] ⓘ

Attachments

Computer: [Upload Button] ⓘ
Cloud: [Drive Icons] ⓘ

Optional Services and Fees

Optional Services and Fees	Fee Amount	Quantity	Fee Total
+ Add Optional Services and Fees			

Undo Save Changes

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.

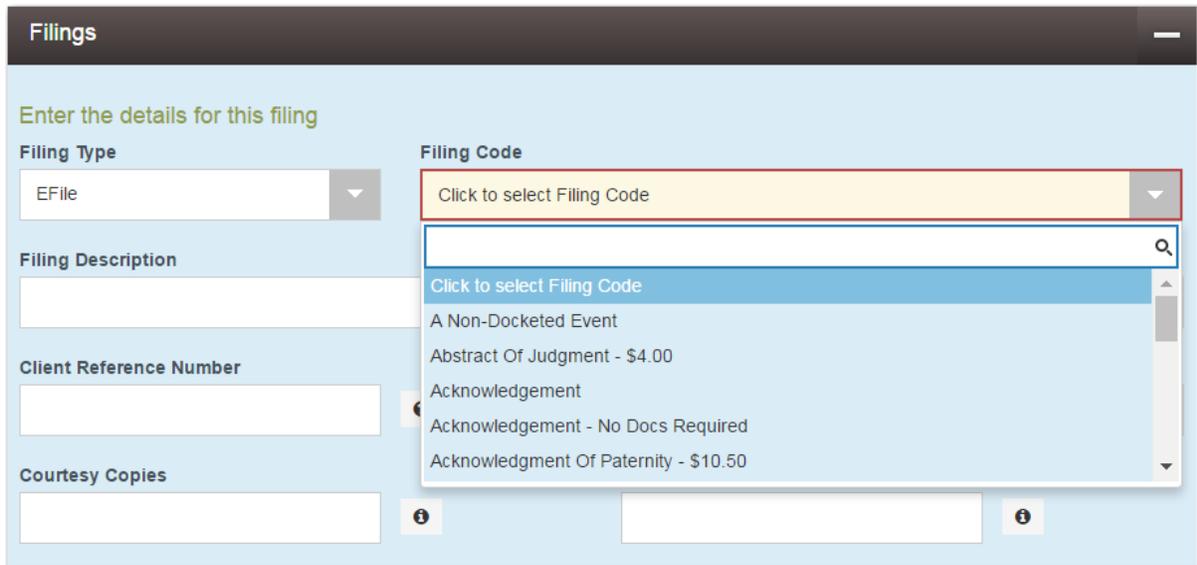


Figure 9.11 – Filing Code Drop-Down List

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.

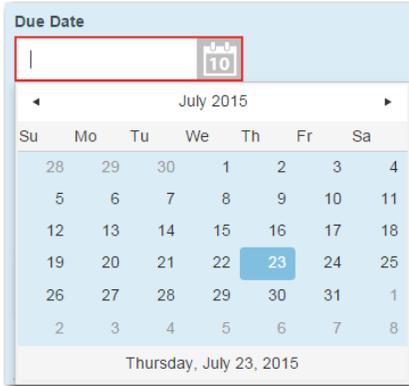


Figure 9.13 – Due Date Calendar

- 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.

Filings

Enter the details for this filing

Filing Type: EFile | Filing Code: Acknowledgement

Filing Description: Example Description

Client Reference Number: 01000101 | Comments to Court: [Empty]

Courtesy Copies: [Empty] | Preliminary Copies: [Empty]

Due Date: 10/12/2016

Filing on Behalf of: Mary Adams, Johnson Cleaners

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.

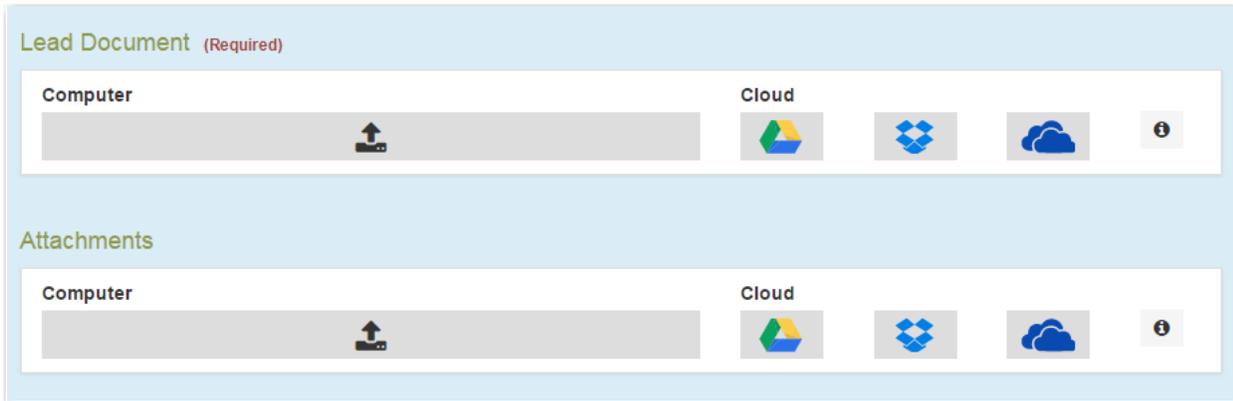


Figure 9.15 – Lead Document and Attachments Fields in the Filings Section

- 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.

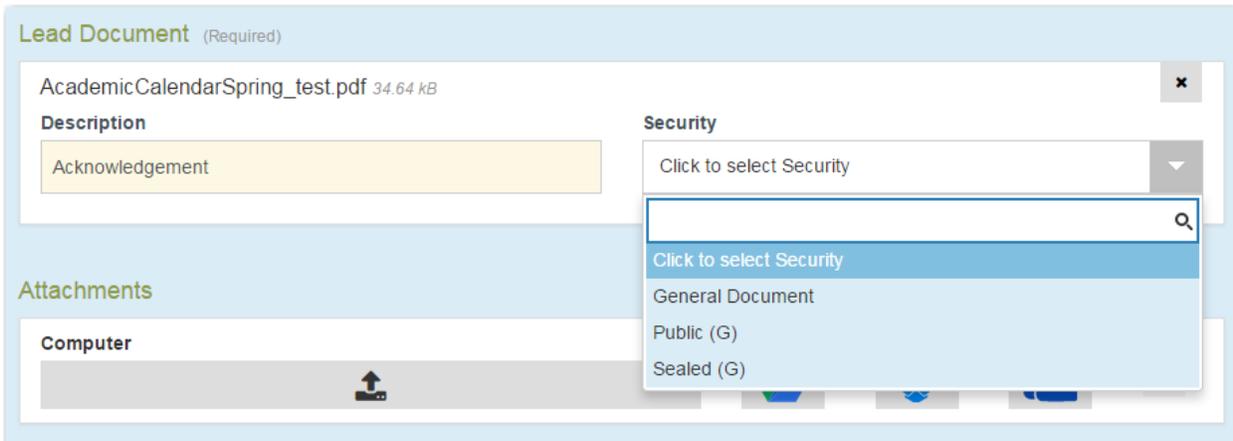


Figure 9.16 – Security Drop-Down List in the Lead Document Section

- 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.

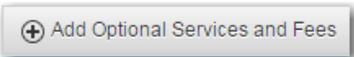
Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

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.

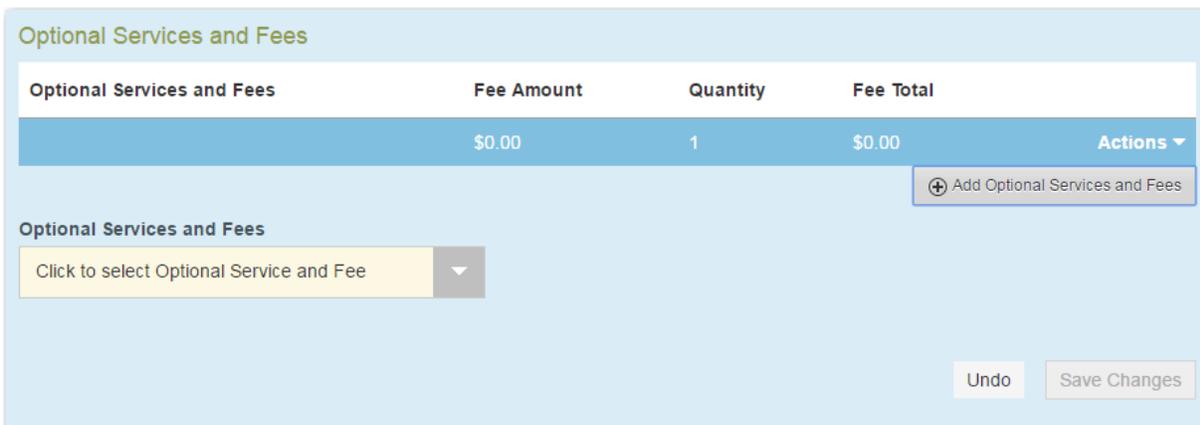


Figure 9.18 – Optional Services and Fees Field in the Optional Services and Fees Section

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

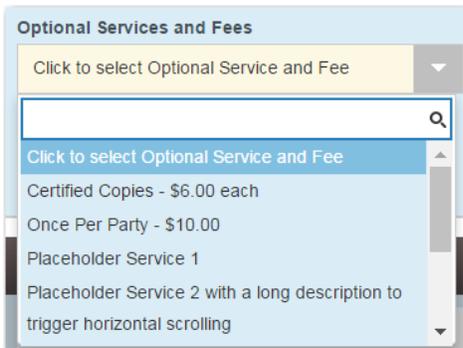


Figure 9.19 – Optional Services and Fees Drop-Down List

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.

Optional Services and Fees

Optional Services and Fees	Fee Amount	Quantity	Fee Total	
Priority Processing	\$6.00	1	\$6.00	Actions ▾
Certified Copies	\$6.00	3	\$18.00	Actions ▾

Optional Services and Fees **Enter number of certified copies desired**
 Certified Copies - \$6.00 each 3

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.

Actions ▾
Remove optional service

Figure 9.21 – Optional Service Actions Drop-Down List

- q. When you are done adding optional services, click

Optional Services and Fees

Optional Services and Fees	Fee Amount	Quantity	Fee Total	
Certified Copies	\$6.00	3	\$18.00	Actions ▾
Priority Processing	\$6.00	1	\$6.00	Actions ▾

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.

Fees

▼ Proposed Order

Description	Amount
Filing Fee	\$0.00
Filing Total:	\$0.00

Total Filing Fee	\$0.00
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total:	\$2.00

Payment Account

Click to select Payment Account

[View Unavailable Payment Accounts](#)

Party Responsible for Fees

Click to select Party Responsible for Fees

Filing Attorney

Click to select Filing Attorney

Filer Type

Default

Undo Save Changes

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.

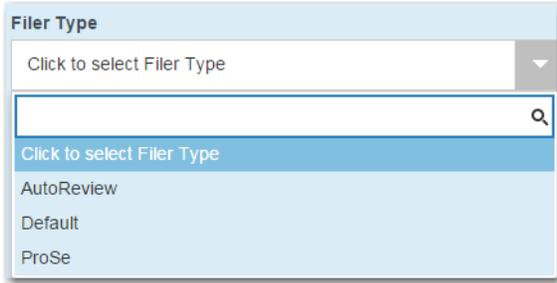


Figure 9.24 – Filer Type Drop-Down List

- e. Click **Save Changes** to save your changes, or click **Undo** 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.

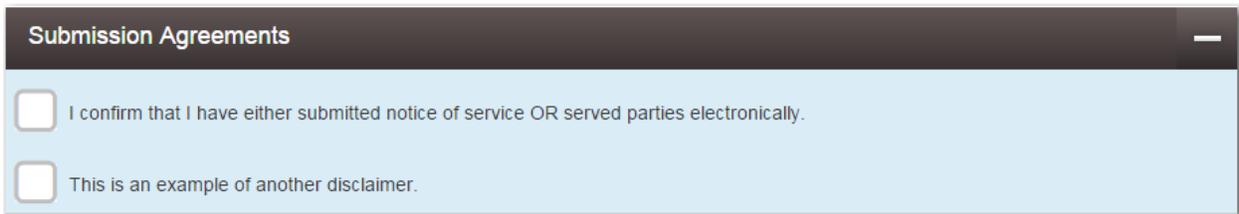


Figure 9.25 – Submission Agreements Section

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

Draft # 149689

Case Information +

Party Information -

Party Type	Party Name	Lead Attorney	
Plaintiff	Felicity Jones	Harvey Birdman	Required Party ▲
Defendant	Joseph Smith MD	Alice Cochran	Required Party ▼

[+ Add Another Party](#)

Filings +

Service Contacts +

Fees -

▼ Acknowledgement

Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	
Total Filing Fee	\$0.00
Payment Service Fee	\$0.05
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total: \$2.05	

Payment Account

American ExpressAmerican ExpressAmerican ExpressAmeri ▼

Party Responsible for Fees

Joseph Smith MD ▼

Filing Attorney

Harvey Birdman ▼

Filer Type

Default ▼

Undo
Save Changes

Save as Draft
Summary

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.

i 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.

Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	
Total Filing Fee	\$0.00
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Party Fee: 3rd Party Defendant (1 x \$6.00)	\$6.00
Envelope Total: \$8.00	

Payment Account: DD

[View Unavailable Payment Accounts](#)

Party Responsible for Fees: Peter Smith

Filing Attorney: Thomas Crump

Filer Type: Default

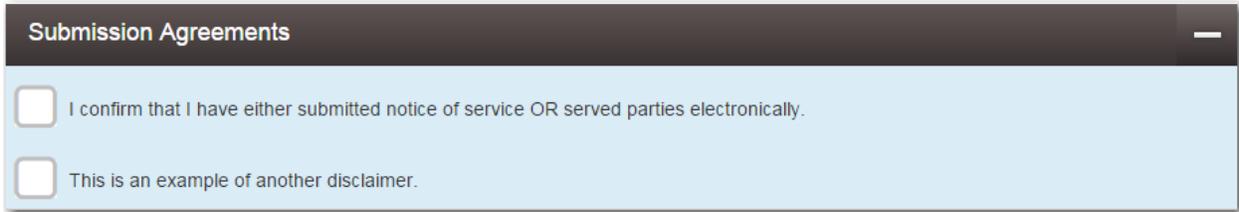
Undo Save Changes

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.

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



Submission Agreements

I confirm that I have either submitted notice of service OR served parties electronically.

This is an example of another disclaimer.

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.

Summary - Draft # 149689

Review and submit your envelope

Case Information +

Party Information -

Party Type	Party Name	Lead Attorney
Plaintiff	Felicity Jones	Harvey Birdman
Defendant	Joseph Smith MD	Alice Cochran

Filings +

Service Contacts +

Fees -

▼ Acknowledgement

Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	
<hr/>	
Total Filing Fee	\$0.00
Payment Service Fee	\$0.05
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total: \$2.05	

Party Responsible for Fees: Joseph Smith

Payment Account: American ExpressAmerican ExpressAmerican ExpressAmerican ExpressAmerican ExpressAmerican ExpressAmerican ExpressAmerican Express

Filing Attorney: Harvey Birdman

Filer Type: Default

Back Submit

Figure 9.29 – Envelope Summary Page

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

CHAPTER 10 FILE INTO AN EXISTING CASE

TOPICS COVERED IN THIS CHAPTER

- ◆ FILING INTO AN EXISTING CASE FROM THE FILING HISTORY PAGE
- ◆ FILING INTO AN EXISTING CASE FROM THE BOOKMARKS PAGE
- ◆ FILING INTO AN EXISTING CASE FROM THE FILER DASHBOARD PAGE
- ◆ CREATING A SERVICE ONLY FILING
- ◆ FILING AN APPEAL TO AN EXISTING CASE

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.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
▼	Case # CV-2016-019208 - Jimmy Green vs Example Defendant			Envelope # 164073 filed Thursday, April 28, 2016 at 2:22 PM CDT by Tyler FilerSrl	Actions ▼
Accepted	Motion	EFile			
▼	Case # CV-2016-044000 - Happy Farms vs Smiley Acres			Envelope # 164072 filed Monday, August 29, 2016 at 4:50 PM CDT by Tyler FilerSrl, Deferred Until 12:00 AM CDT	Actions ▼
Submission Fai...	Reponse	EFile			
▶	Draft # 164070			Draft # 164070 started Thursday, April 28, 2016 at 2:03 PM CDT by Tyler FilerSrl	Actions ▼
▼	Case # CC-16-462 (Judge, Civil)			Envelope # 164066 filed Thursday, April 28, 2016 at 1:55 PM CDT by Tyler FilerSrl	Actions ▼
Accepted	Acknowledgment	EFileAndServe			
▼	Case # CC-16-462 (Judge, Civil)			Envelope # 163057 filed Thursday, April 28, 2016 at 10:07 AM CDT by Tyler FilerSrl	Actions ▼
Accepted	Motion	EFile			
⏪ ◀ 1 ▶ ⏩ 20 items per page 1 - 8 of 8 items ↻					
Back					

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.

Case # CC-15-520

Case Information +

Party Information -

Party Type	Party Name	Attorney
Defendant	Patty Plaintiff	
Plaintiff	Danny Defendant	

+ Add Another Party

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.

Case # CC-15-230

Case Information -

Location OFS QA 2013 - Court at Law 2	Category Civil	Case Type Appeal
Lower Court/Agency #		
Date Filed 5/19/2015	Case # CC-15-230	
Assigned to Judge	Firm Name Individual	Filed By Individual Filer

Party Information -

1612 additional parties excluded due to system constraints.

Party Type	Party Name	Attorney
Defendant	Jane Defendant	
Plaintiff	John Plaintiff	

+ Add Another Party

Figure 10.4 – Case Information and Party Information Sections

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

Filings

Enter the details for this filing

Filing Type: EFile | Filing Code: Acknowledgement

Filing Description: [Text Field]

Client Reference Number: [Text Field] ⓘ | Comments to Court: [Text Field]

Courtesy Copies: [Text Field] ⓘ | Preliminary Copies: [Text Field] ⓘ

Due Date: [Calendar Picker]

Filing on Behalf of: *Select the parties you are filing on behalf of

Lead Document (Required)

Computer: [Upload Button] | Cloud: [Drive Icons] ⓘ

Attachments

Computer: [Upload Button] | Cloud: [Drive Icons] ⓘ

Optional Services and Fees

Optional Services and Fees	Fee Amount	Quantity	Fee Total
+ Add Optional Services and Fees			

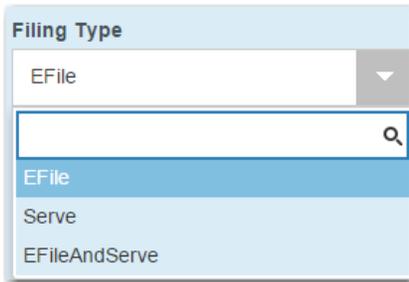
Undo | Save Changes

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**.

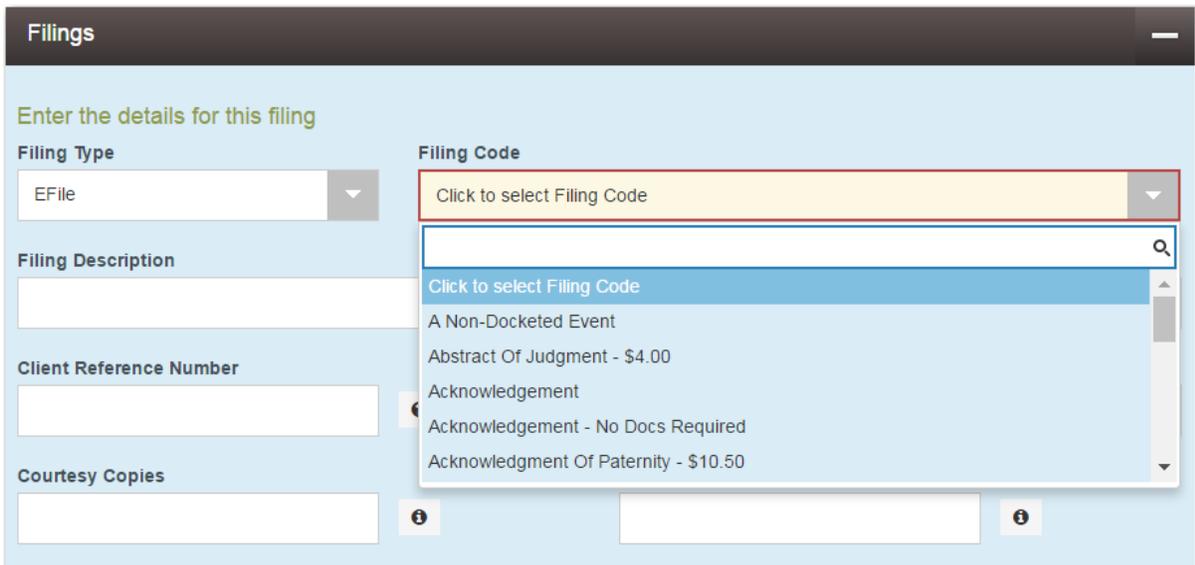
Note: Serve is not a default option.



The image shows a 'Filing Type' dropdown menu. The selected option is 'EFile'. Below the dropdown is a search bar with a magnifying glass icon. The search results list 'EFile', 'Serve', and 'EFileAndServe'.

Figure 10.6 – Filing Type Drop-Down List

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



The image shows a 'Filings' form with the 'Filing Code' dropdown menu open. The dropdown list includes the following options: 'Click to select Filing Code', 'A Non-Docketed Event', 'Abstract Of Judgment - \$4.00', 'Acknowledgement', 'Acknowledgement - No Docs Required', and 'Acknowledgment Of Paternity - \$10.50'. The 'Filing Type' is set to 'EFile'.

Figure 10.7 – Filing Code Drop-Down List

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



The image shows the 'Filings' form with the 'Filing Code' dropdown menu selected. The selected option is 'Abstract Of Judgment - \$4.00'. The 'Filing Type' is set to 'EFile'.

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.

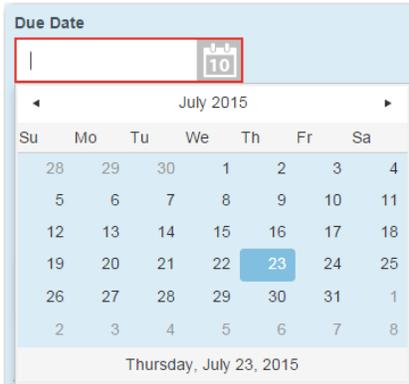


Figure 10.9 – Due Date Calendar

- 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.

Filings

Enter the details for this filing

Filing Type
EFile

Filing Code
Acknowledgement

Filing Description
Example Description

Client Reference Number
01000101

Comments to Court

Courtesy Copies

Preliminary Copies

Due Date
10/12/2016

Filing on Behalf of
Mary Adams
Johnson Cleaners

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.

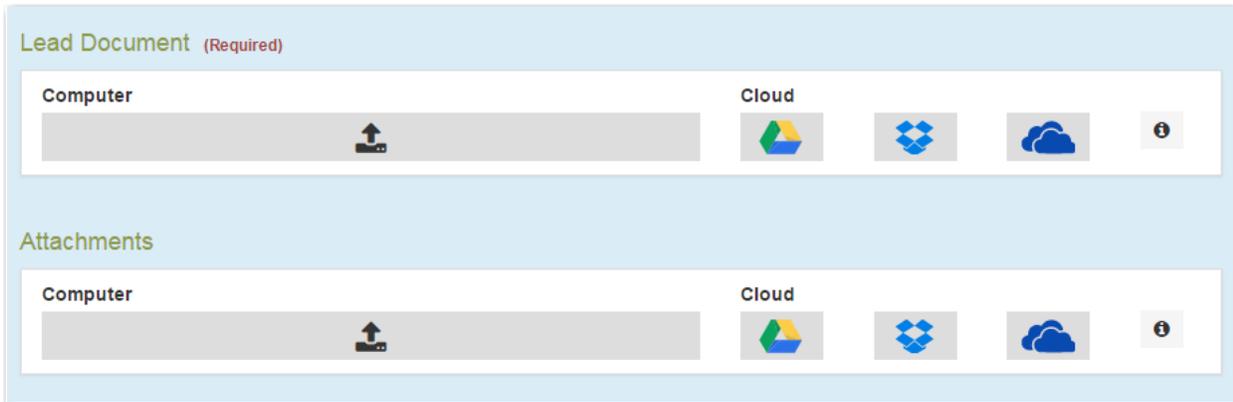


Figure 10.11 – Lead Document and Attachments Fields in the Filings Section

- 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.

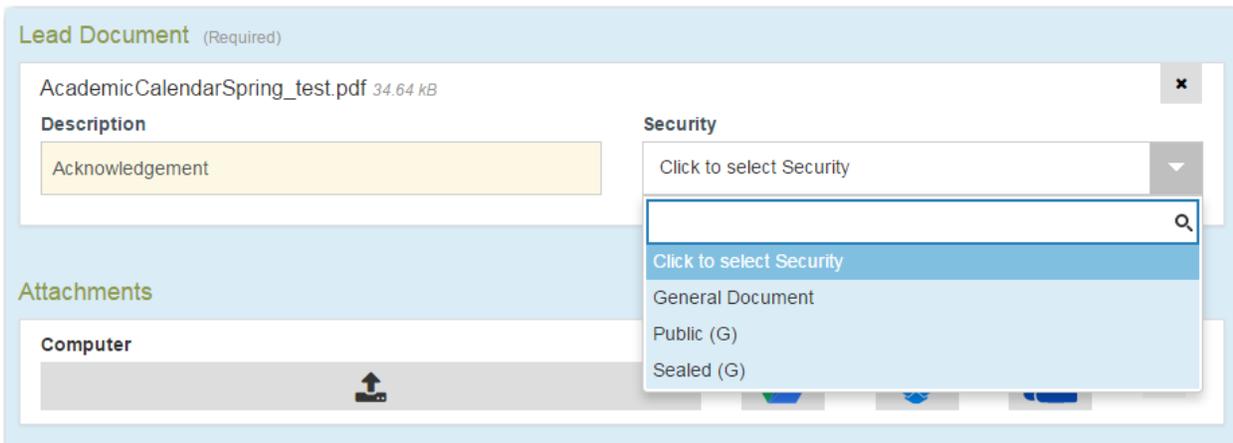


Figure 10.12 – Security Drop-Down List in the Lead Document Section

- 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.

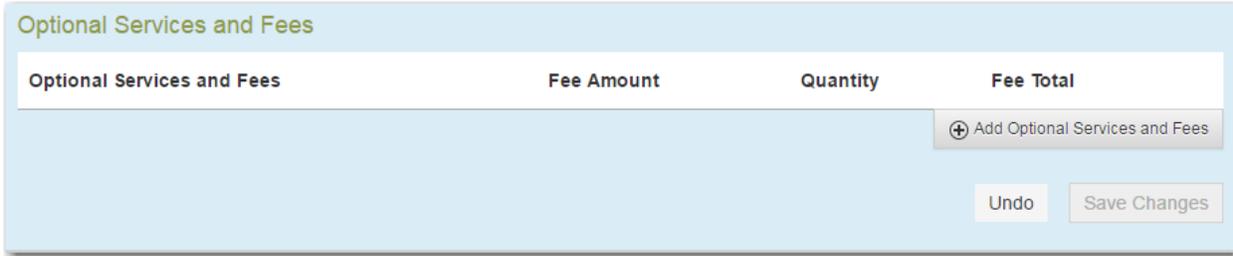


Figure 10.13 – Optional Services and Fees Section

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



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

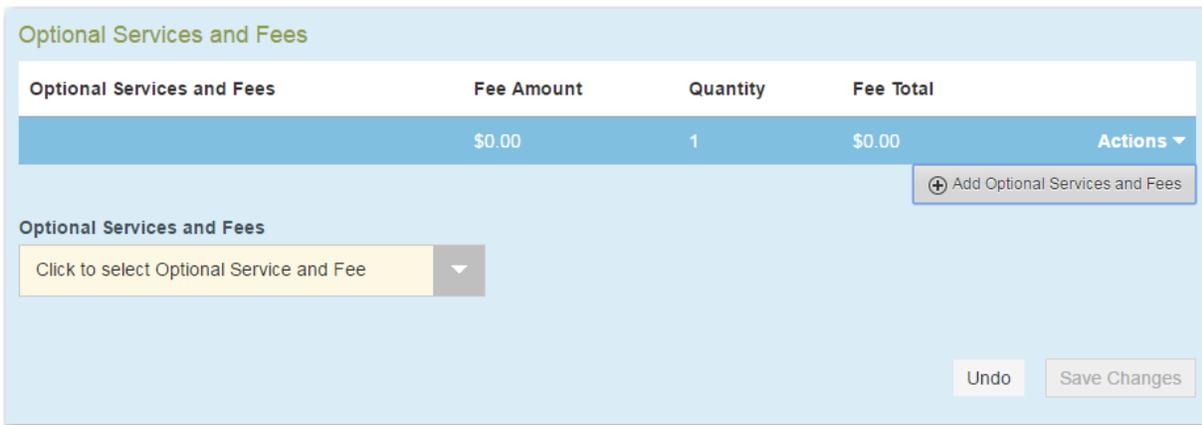


Figure 10.14 – Optional Services and Fees Field in the Optional Services and Fees Section

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

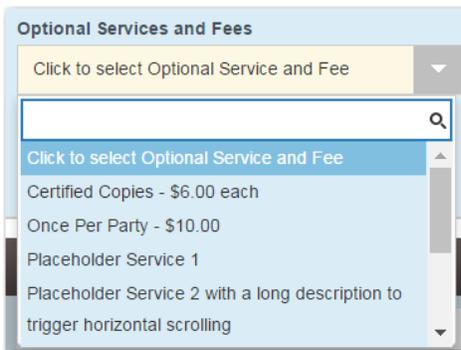


Figure 10.15 – Optional Services and Fees Drop-Down List

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.

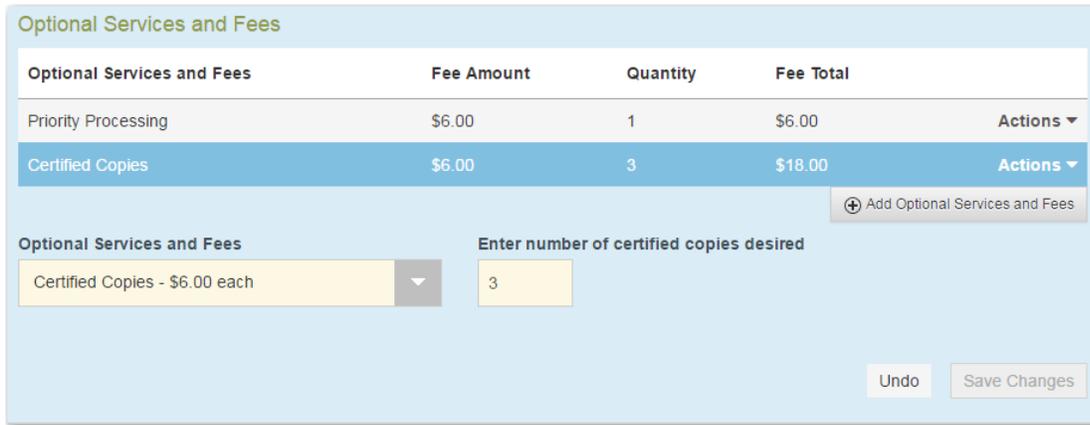


Figure 10.16 – Optional Services and Fees Section with Services Selected

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.

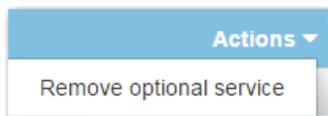


Figure 10.17 – Optional Service Actions Drop-Down List

q. When you are done adding optional services, click



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  to save your changes, or click  to cancel the action.

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

i 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.

Fees

▼ Proposed Order

Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	
Total Filing Fee	\$0.00
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total: \$2.00	

Payment Account

Click to select Payment Account

[View Unavailable Payment Accounts](#)

Party Responsible for Fees

Click to select Party Responsible for Fees

Filing Attorney

Click to select Filing Attorney

Filer Type

Default

Undo Save Changes

Figure 10.19 – Fees Section

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

i 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.

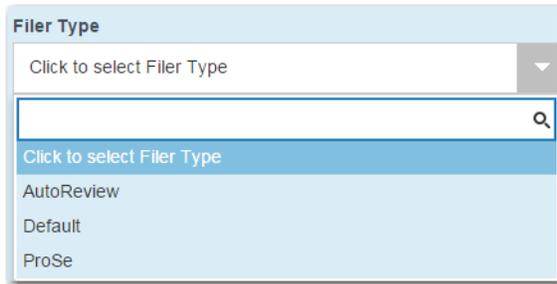


Figure 10.20 – Filer Type Drop-Down List

- 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:

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

Bookmarks			
Search			
Case Number	Location	Description	
CC-15-1375	OFS QA 2014		Actions ▾
8675309	OFS Non-Integrated		Actions ▾
CV-2016-008764	OFS MockCMS	Jane Doe vs Smith Apartments	Actions ▾
CV-2016-008669	OFS MockCMS	Peter Plaintiff vs Daniel Defendant	Actions ▾
CC-16-430	OFS QA 2014		Actions ▾
CC-16-381	OFS QA 2012	Jessy James v. Mark Twain	Actions ▾
CC-16-379	OFS QA 2012	maricio chantre v. brian woodson	Actions ▾
CC-16-353	OFS QA 2012		Actions ▾
CC-16-311	OFS QA 2012	lee nabol v. tom james	Actions ▾
2015-CV-0097	QAJUD (Odyssey Mainline QA)	Test Plaintiff VSTest Defendant	Actions ▾
			10 total items

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**.

File Into Case
View Service Contacts
Remove Bookmark

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.

Case # CV-2016-008669 - Peter Plaintiff vs Daniel Defendant

Case Information —

Location OFS MockCMS	Category Civil	Case Type Fraud
Lower Court/Agency # Lower Court Code		
Case # CV-2016-008669		

Party Information —

Party Type	Party Name	Lead Attorney
Plaintiff	Peter Plaintiff	
Defendant	Daniel Defendant	

Figure 10.23 – Case Information and Party Information Sections

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

Filings

Enter the details for this filing

Filing Type: EFile
Filing Code: Acknowledgement

Filing Description:

Client Reference Number: ⓘ

Comments to Court:

Courtesy Copies: ⓘ

Preliminary Copies: ⓘ

Due Date:

Filing on Behalf of: *Select the parties you are filing on behalf of

Lead Document (Required)

Computer: ⓘ

Cloud: ⓘ

Attachments

Computer: ⓘ

Cloud: ⓘ

Optional Services and Fees

Optional Services and Fees	Fee Amount	Quantity	Fee Total
+ Add Optional Services and Fees			

Undo Save Changes

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.

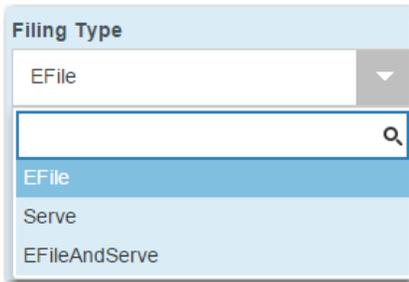


Figure 10.25 – Filing Type Drop-Down List

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

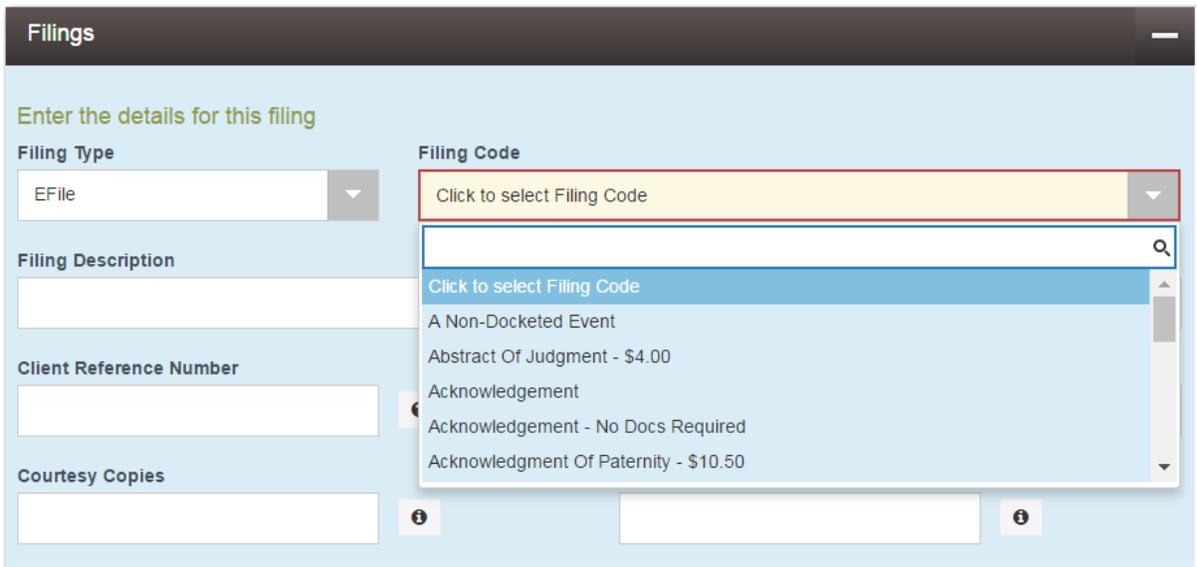


Figure 10.26 – Filing Code Drop-Down List

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.

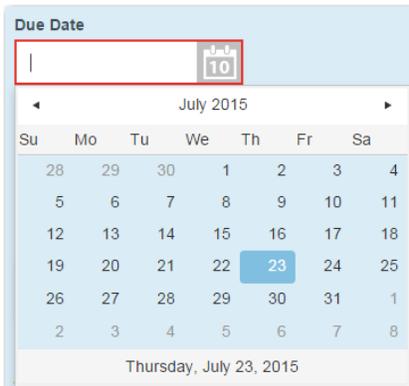


Figure 10.28 – Due Date Calendar

- 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.

Filings

Enter the details for this filing

Filing Type
EFile

Filing Code
Acknowledgement

Filing Description
Example Description

Client Reference Number
01000101

Comments to Court

Courtesy Copies

Preliminary Copies

Due Date
10/12/2016

Filing on Behalf of
Mary Adams
Johnson Cleaners

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.

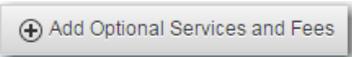
Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

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.

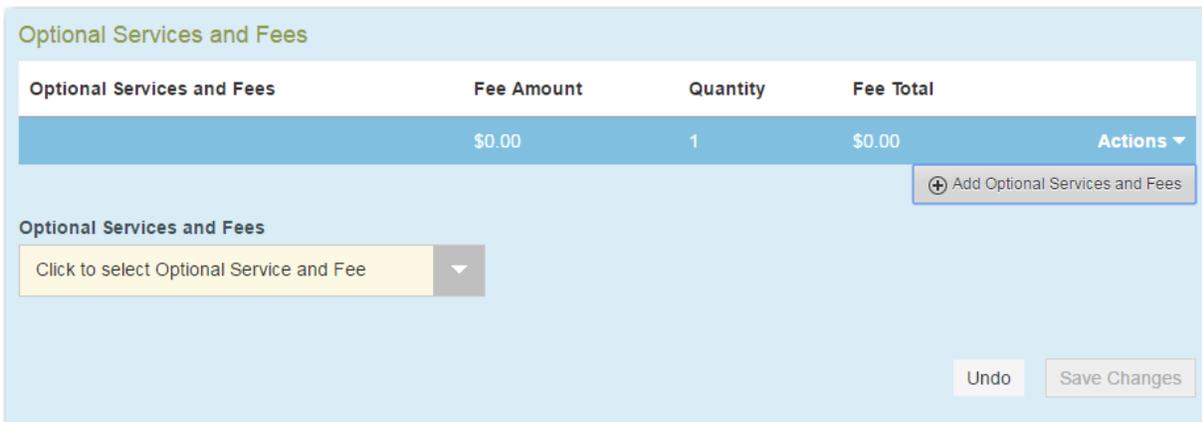


Figure 10.33 – Optional Services and Fees Field in the Optional Services and Fees Section

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.

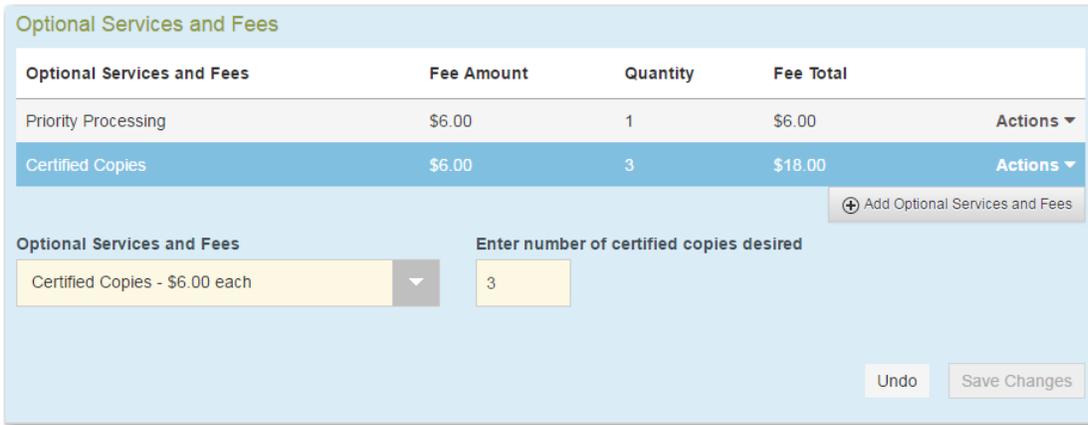


Figure 10.35 – Optional Services and Fees Section with Services Selected

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.

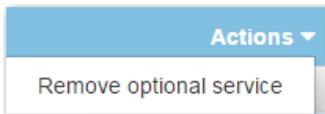


Figure 10.36 – Optional Service Actions Drop-Down List

q. When you are done adding optional services, click



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  to save your changes, or click  to cancel the action.

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

i 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.

Fees

▼ Proposed Order

Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	
Total Filing Fee	\$0.00
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total: \$2.00	

Payment Account

Click to select Payment Account

[View Unavailable Payment Accounts](#)

Party Responsible for Fees

Click to select Party Responsible for Fees

Filing Attorney

Click to select Filing Attorney

Filer Type

Default

Undo Save Changes

Figure 10.38 – Fees Section

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

i 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.

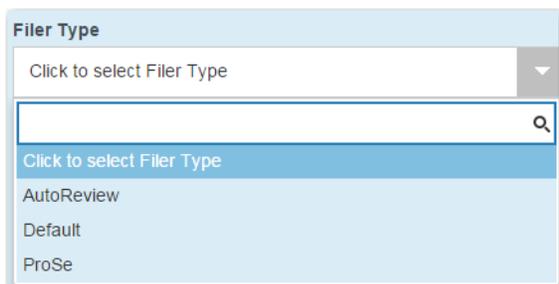


Figure 10.39 – Filer Type Drop-Down List

- 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.

Case # CC-15-520

Case Information +

Party Information -

Party Type	Party Name	Attorney
Defendant	Patty Plaintiff	
Plaintiff	Danny Defendant	

+ Add Another Party

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.

Case # CC-15-230

Case Information -

Location OFS QA 2013 - Court at Law 2	Category Civil	Case Type Appeal
Lower Court/Agency #		
Date Filed 5/19/2015	Case # CC-15-230	
Assigned to Judge	Firm Name Individual	Filed By Individual Filer

Party Information -

1612 additional parties excluded due to system constraints.

Party Type	Party Name	Attorney
Defendant	Jane Defendant	
Plaintiff	John Plaintiff	

+ Add Another Party

Figure 10.43 – Case Information and Party Information Sections

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

Filings

Enter the details for this filing

Filing Type: EFile
Filing Code: Acknowledgement

Filing Description: [Text Area]

Client Reference Number: [Text Area] ⓘ
Comments to Court: [Text Area]

Courtesy Copies: [Text Area] ⓘ
Preliminary Copies: [Text Area] ⓘ

Due Date: [Calendar]

Filing on Behalf of: *Select the parties you are filing on behalf of

Lead Document (Required)

Computer [Upload Icon] Cloud [Dropbox] [OneDrive] [iCloud] ⓘ

Attachments

Computer [Upload Icon] Cloud [Dropbox] [OneDrive] [iCloud] ⓘ

Optional Services and Fees

Optional Services and Fees	Fee Amount	Quantity	Fee Total
+ Add Optional Services and Fees			

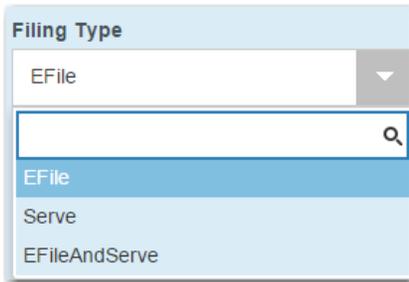
Undo Save Changes

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**.

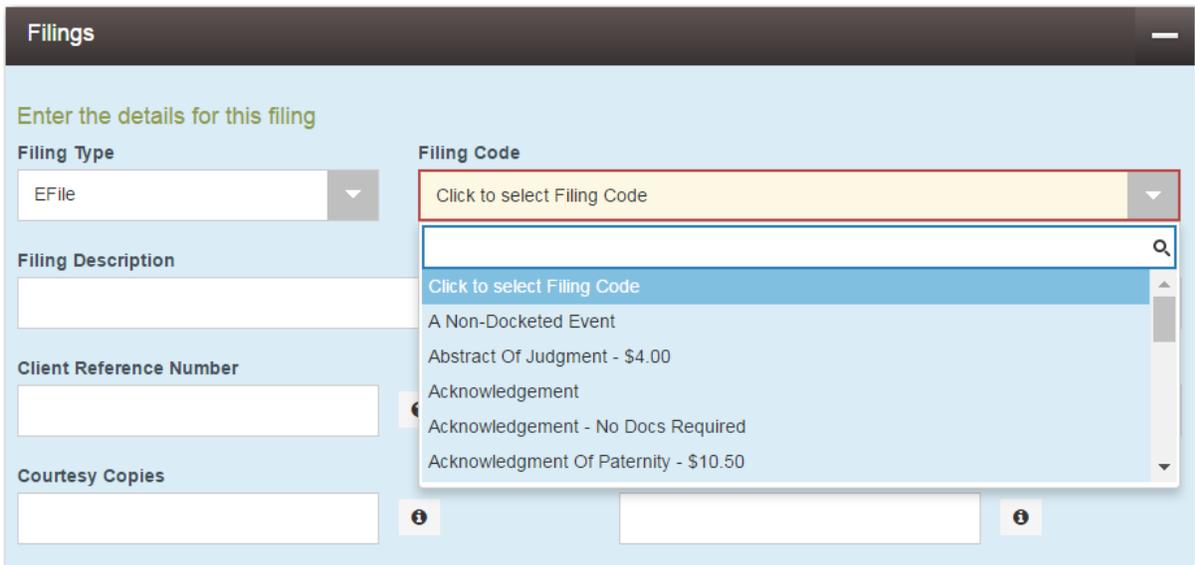
Note: Serve is not a default option.



The image shows a 'Filing Type' dropdown menu. The selected option is 'EFile'. Below the dropdown is a search bar with a magnifying glass icon. The search results list 'EFile', 'Serve', and 'EFileAndServe'.

Figure 10.45 – Filing Type Drop-Down List

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



The image shows a 'Filings' form with the following fields: 'Filing Type' (set to 'EFile'), 'Filing Description', 'Client Reference Number', and 'Courtesy Copies'. The 'Filing Code' dropdown is open, showing a search bar and a list of options: 'Click to select Filing Code', 'A Non-Docketed Event', 'Abstract Of Judgment - \$4.00', 'Acknowledgement', 'Acknowledgement - No Docs Required', and 'Acknowledgement Of Paternity - \$10.50'.

Figure 10.46 – Filing Code Drop-Down List

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



The image shows the 'Filings' form with the 'Filing Code' dropdown now displaying 'Abstract Of Judgment - \$4.00'.

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.

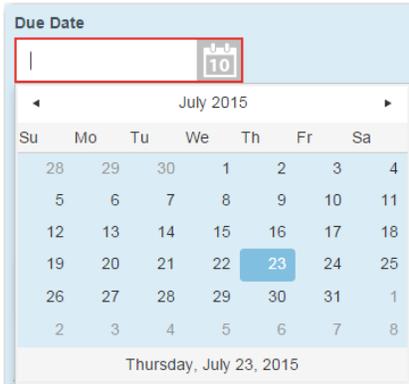


Figure 10.48 – Due Date Calendar

- 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.

Filings

Enter the details for this filing

Filing Type
EFile

Filing Code
Acknowledgement

Filing Description
Example Description

Client Reference Number
01000101

Comments to Court

Courtesy Copies

Preliminary Copies

Due Date
10/12/2016

Filing on Behalf of
Mary Adams
Johnson Cleaners

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.

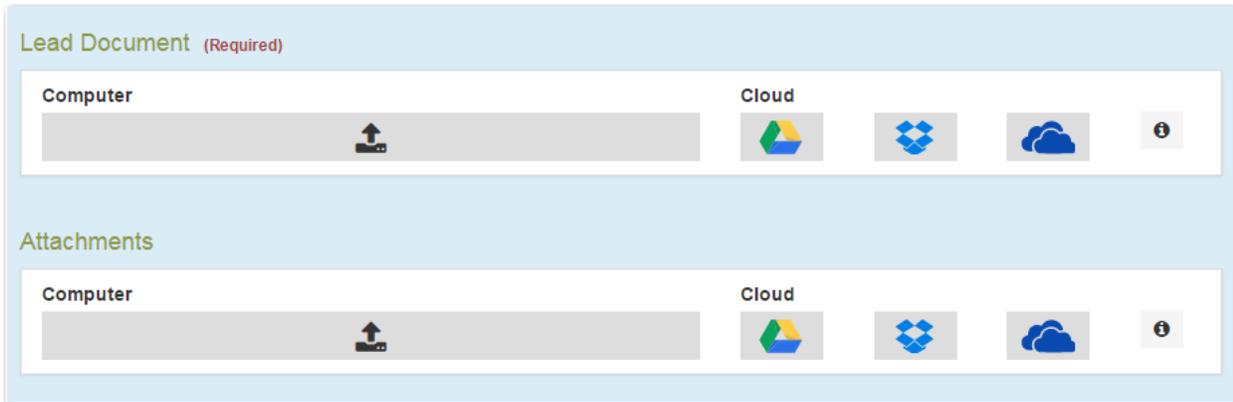


Figure 10.50 – Lead Document and Attachments Fields in the Filings Section

- 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.

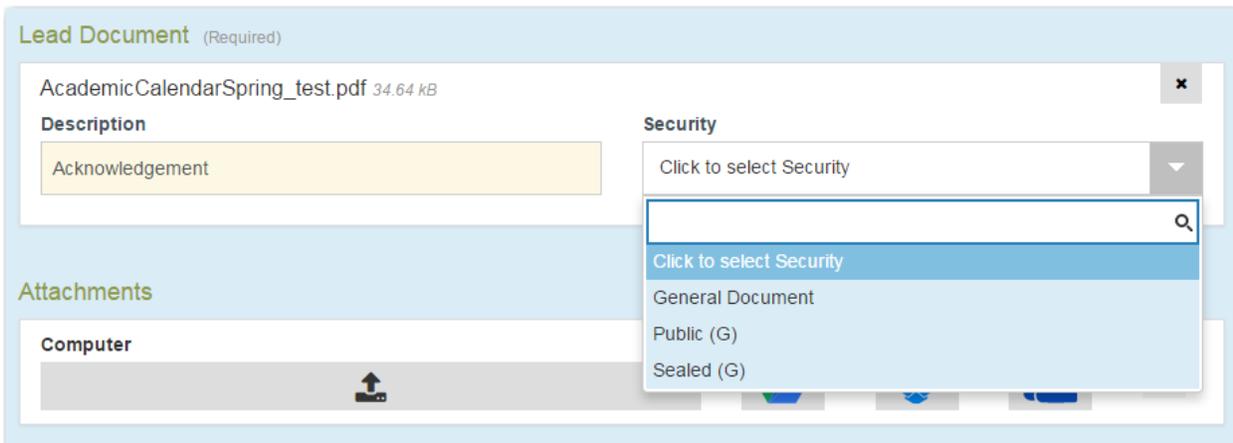


Figure 10.51 – Security Drop-Down List in the Lead Document Section

- 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.

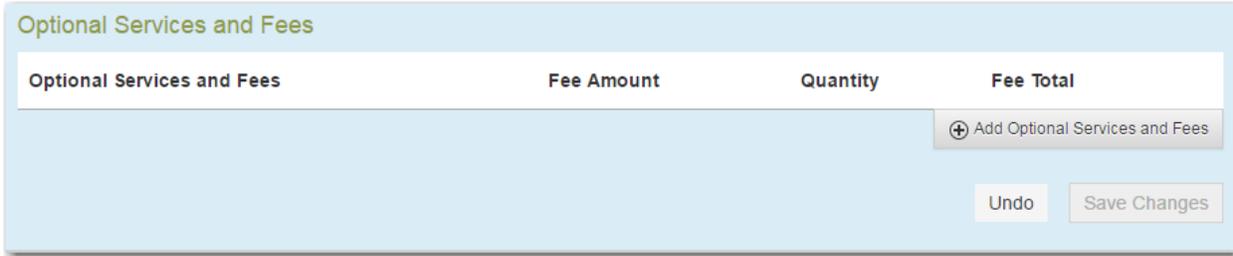
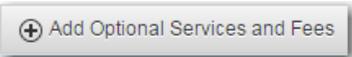


Figure 10.52 – Optional Services and Fees Section

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



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

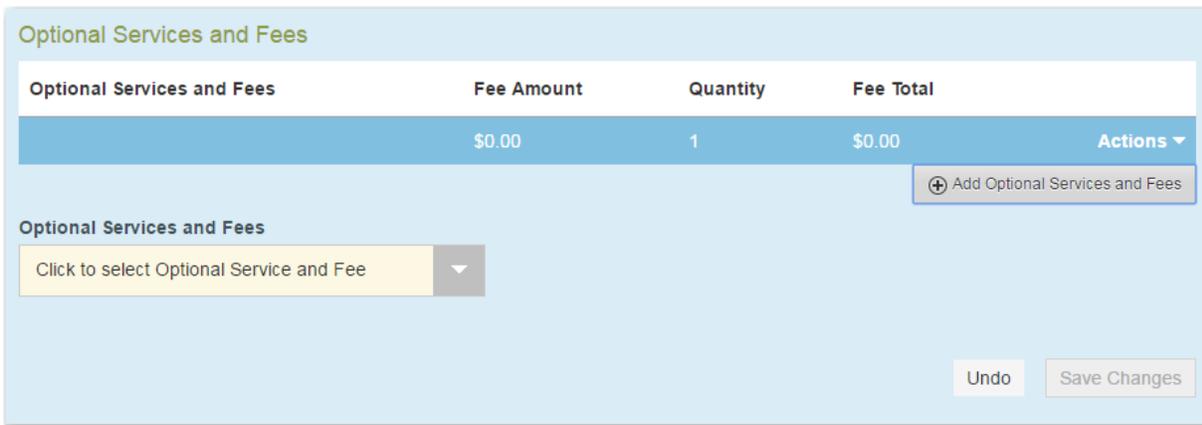


Figure 10.53 – Optional Services and Fees Field in the Optional Services and Fees Section

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

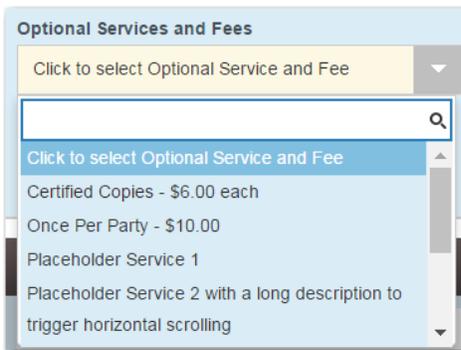


Figure 10.54 – Optional Services and Fees Drop-Down List

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.

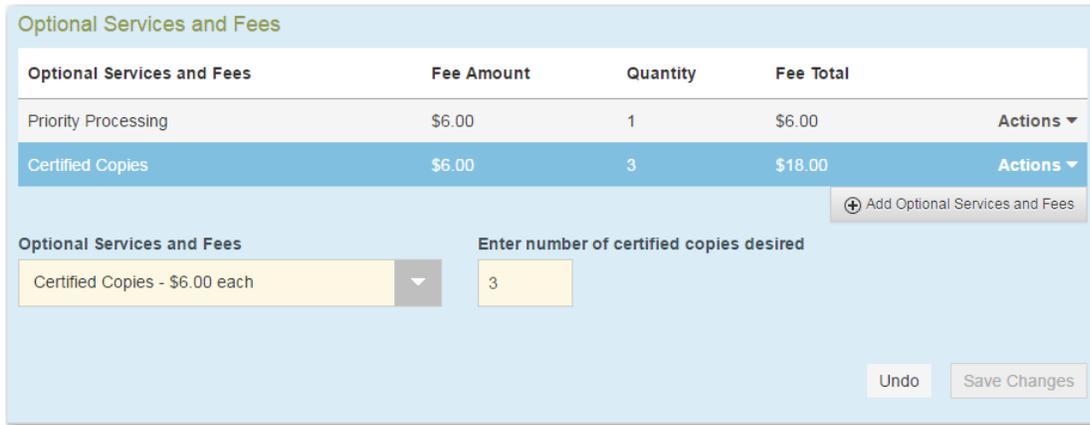


Figure 10.55 – Optional Services and Fees Section with Services Selected

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.

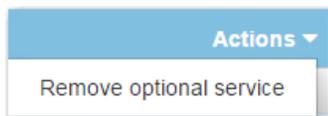


Figure 10.56 – Optional Service Actions Drop-Down List

q. When you are done adding optional services, click



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  to save your changes, or click  to cancel the action.

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

i 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.

Fees

▼ Proposed Order

Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	
Total Filing Fee	\$0.00
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total: \$2.00	

Payment Account

Click to select Payment Account

[View Unavailable Payment Accounts](#)

Party Responsible for Fees

Click to select Party Responsible for Fees

Filing Attorney

Click to select Filing Attorney

Filer Type

Default

Undo Save Changes

Figure 10.58 – Fees Section

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

i 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.

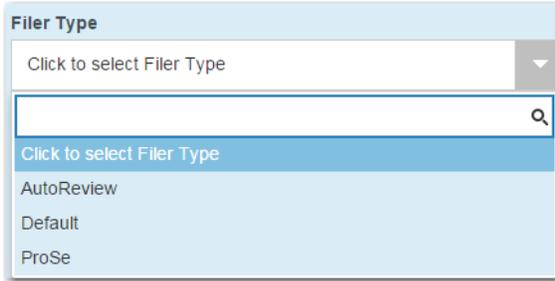


Figure 10.59 – Filer Type Drop-Down List

- 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.

Case # CC-16-3108 - A Plaintiff v. A Defendant

Case Information +

Party Information +

Filings -

Filing Code	Client Ref #	Filing Description
Service Only		Service only

[Add Another Filing](#)

Enter the details for this filing

Filing Type

Filing Description

Client Reference Number

Comments to Court

Courtesy Copies

Preliminary Copies

Filing on Behalf of

Service Document (Required)

AcademicCalendarSpring_test.pdf 34.64 KB

Description

Security

Computer

Cloud

[Undo](#) [Save Changes](#)

Service Contacts +

Fees -

Service Only

Description	Amount
Filing Fee	\$0.00
Filing Total:	\$0.00
<hr/>	
Total Filing Fee	\$0.00
View Unavailable Payment Accounts	Envelope Total: \$0.00
Filing Attorney <input type="text" value="Perry Mason"/>	
Filer Type <input type="text" value="Default"/>	

[Undo](#) [Save Changes](#)

[Save as Draft](#) [Summary](#)

Figure 10.60 – Case Page

- 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 .
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  to stop working on your filing and resume work at a later time, or click  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.

Save Changes

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**.

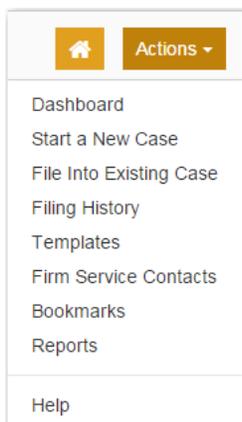


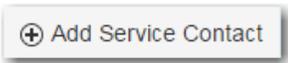
Figure 11.1 – Actions Drop-Down List

The *Firm Service Contacts* page is displayed.

The screenshot shows a web interface titled "Firm Service Contacts". At the top, there is a search bar with the placeholder text "Search by first or last name" and a button labeled "Add Service Contact" with a plus icon. Below the search bar is a table with two columns: "Name" and "Email". The table contains ten rows of contact information. Each row has an "Actions" dropdown menu to its right. At the bottom of the table, there is a pagination control showing "1" selected, "Items per page: 10", and "43 total items".

Name	Email	Actions
mary adams	retrwet@aqwer.com	Actions ▾
George Adams	gadams@yahoo.com	Actions ▾
Jennifer d Anderson	jennifer.anderson@mailinator.com	Actions ▾
john babbitt	johnbabbitt@tylertech.com	Actions ▾
aaa bbb	bbb@tylertech.com	Actions ▾
reggie burbank	asdsa@dsfsd.com	Actions ▾
one contact	one@contact.com	Actions ▾
two sd contact	two@contact.com	Actions ▾
third contact	third@contact.com	Actions ▾
fourth contact	fourth@contact.com	Actions ▾

Figure 11.2 – Firm Service Contacts Page

2. Click  .

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  to save the contact, or click  to cancel the action.

If you click , 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**.

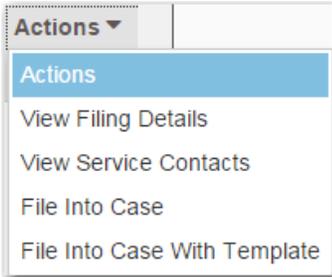


Figure 11.4 – Actions Drop-Down List

The *Service Contacts* page is displayed.

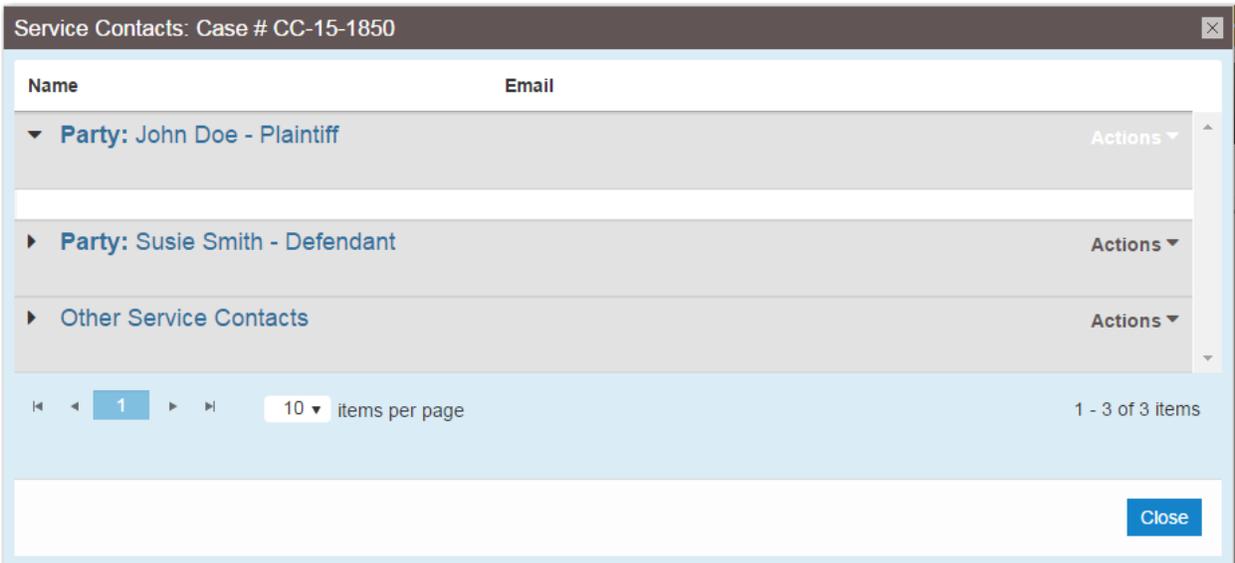


Figure 11.5 – Service Contacts Page

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.

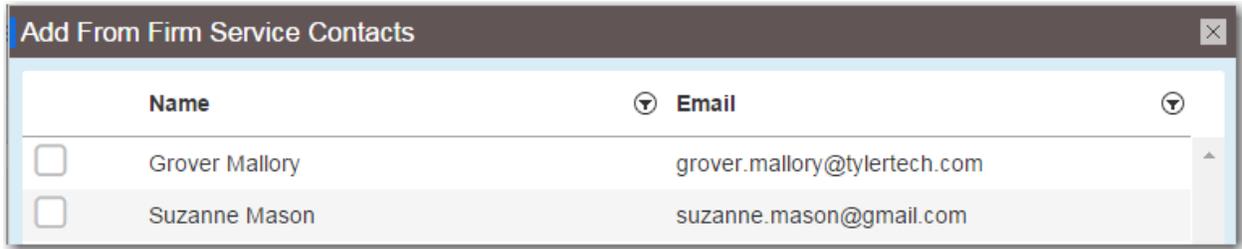


Figure 11.7 – Add From Firm Service Contacts Dialog Box

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.

Firm Service Contacts		
Search by first or last name		+ Add Service Contact
Name	Email	
mary adams	retrwet@aqwer.com	Actions ▾
George Adams	gadams@yahoo.com	Actions ▾
Jennifer d Anderson	jennifer.anderson@mailinator.com	Actions ▾
john babbit	johnbabbit@tylertech.com	Actions ▾
aaa bbb	bbb@tylertech.com	Actions ▾
reggie burbank	asdsa@dsfsd.com	Actions ▾
one contact	one@contact.com	Actions ▾
two sd contact	two@contact.com	Actions ▾
third contact	third@contact.com	Actions ▾
fourth contact	fourth@contact.com	Actions ▾

42 total items

Items per page: 10 ▾

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.

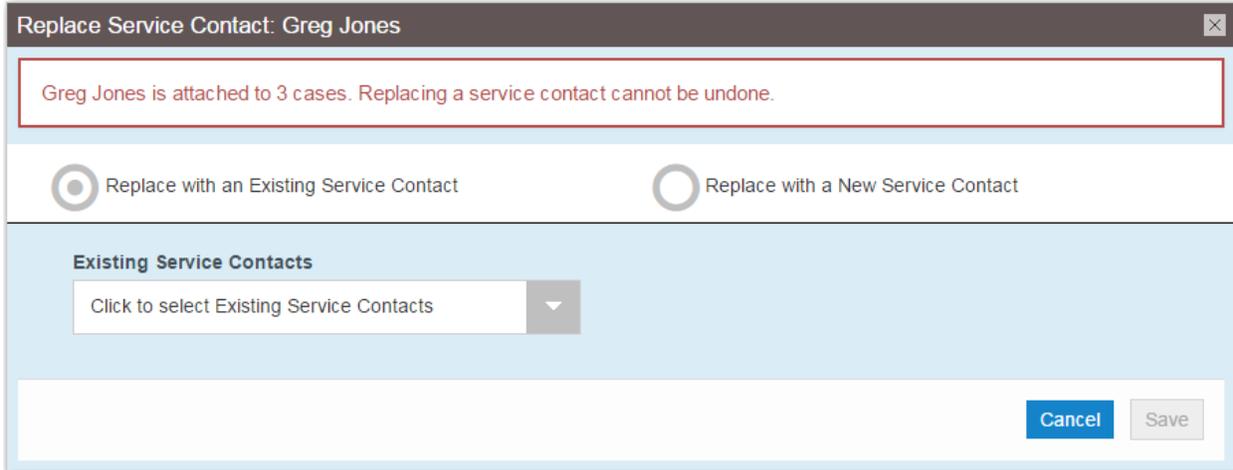


Figure 11.10 – Replace Service Contact Dialog Box

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  .

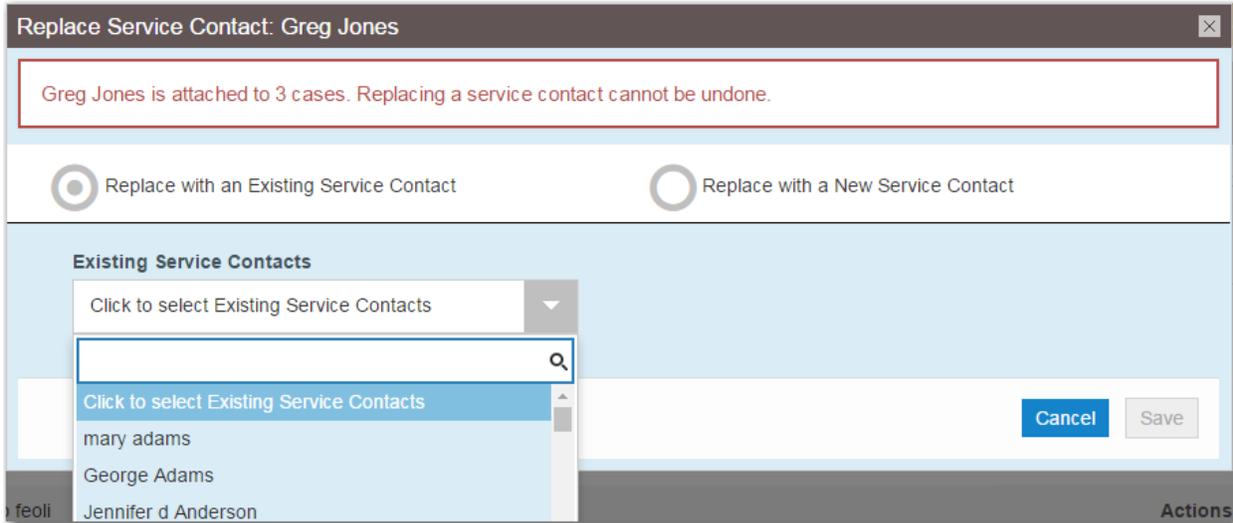


Figure 11.11 – Replace Service Contact Dialog Box with Existing Service Contacts Drop-Down List

- 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  .

Replace Service Contact: Greg Jones

Greg Jones is attached to 3 cases. Replacing a service contact cannot be undone.

Replace with an Existing Service Contact Replace with a New Service Contact

First Name:

Middle Name:

Last Name:

Firm Name:

Email:

Administrative Copy:

Country:

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Phone Number:

Make This Contact Public ⓘ

Undo Save Changes Cancel

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

i 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.

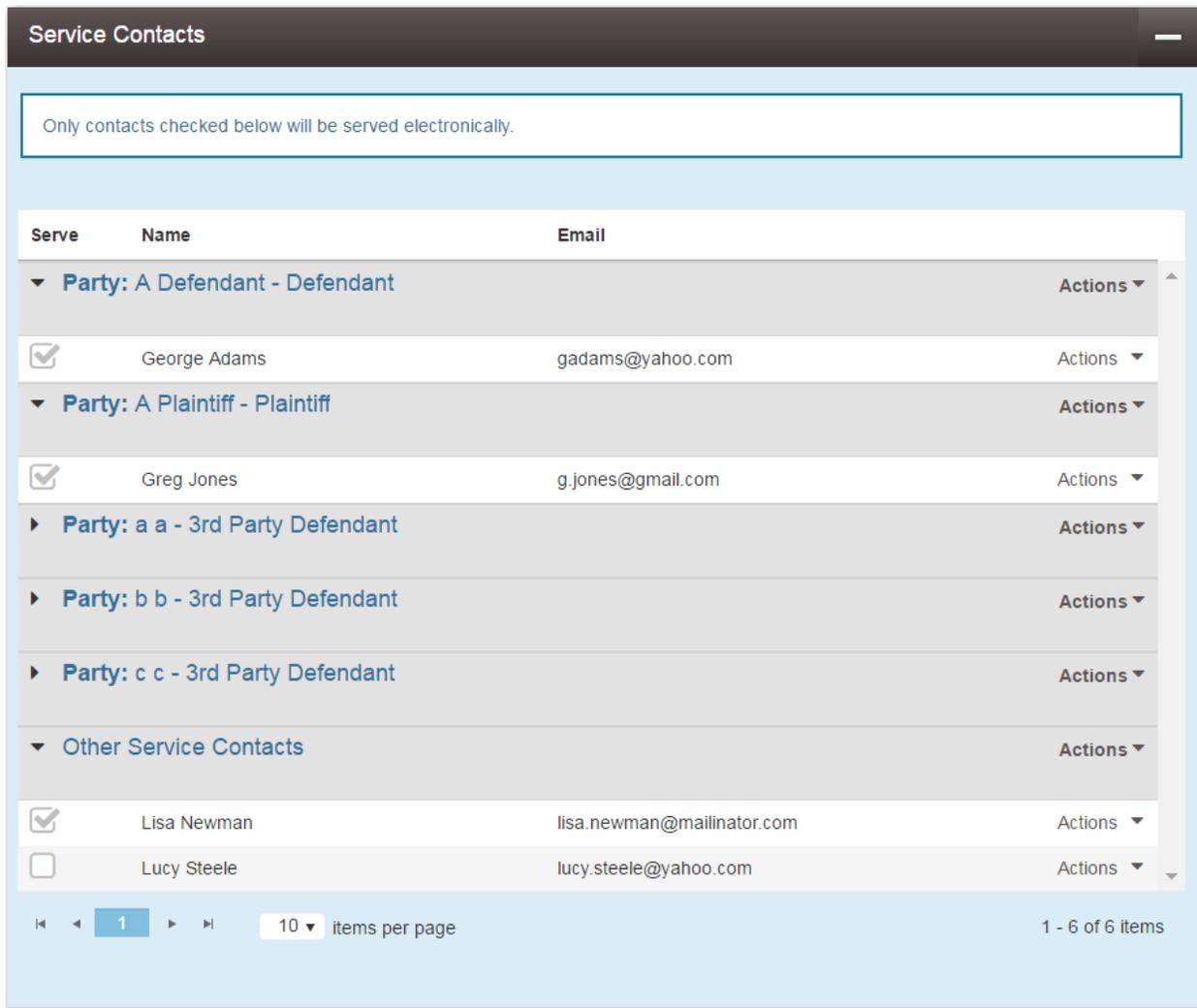


Figure 11.13 – Service Contacts Selected by Default (With One Contact Deselected)

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.

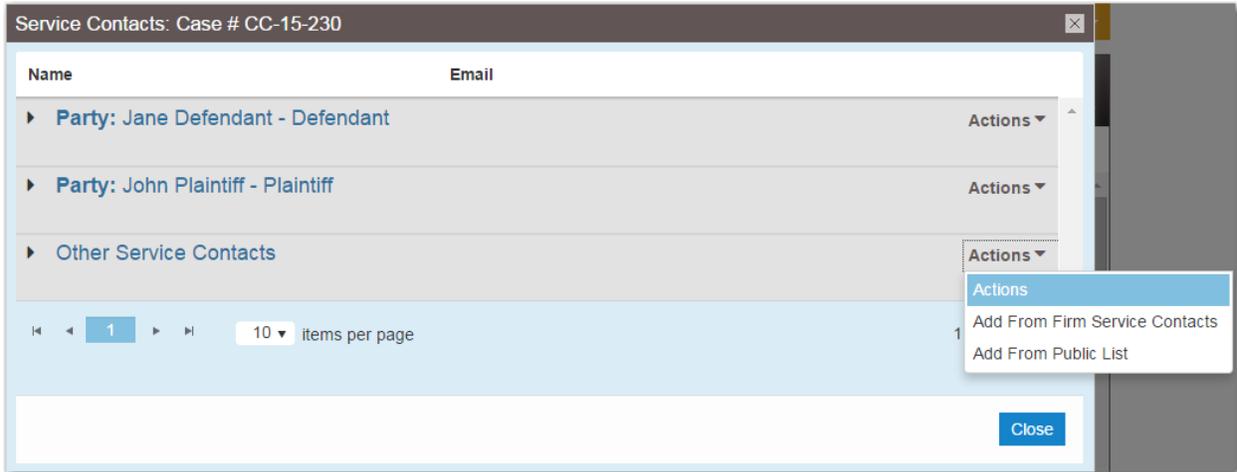


Figure 11.14 – Service Contacts Page

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**.

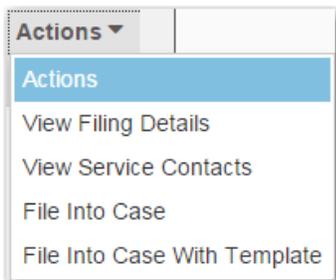


Figure 11.15 – Actions Drop-Down List

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

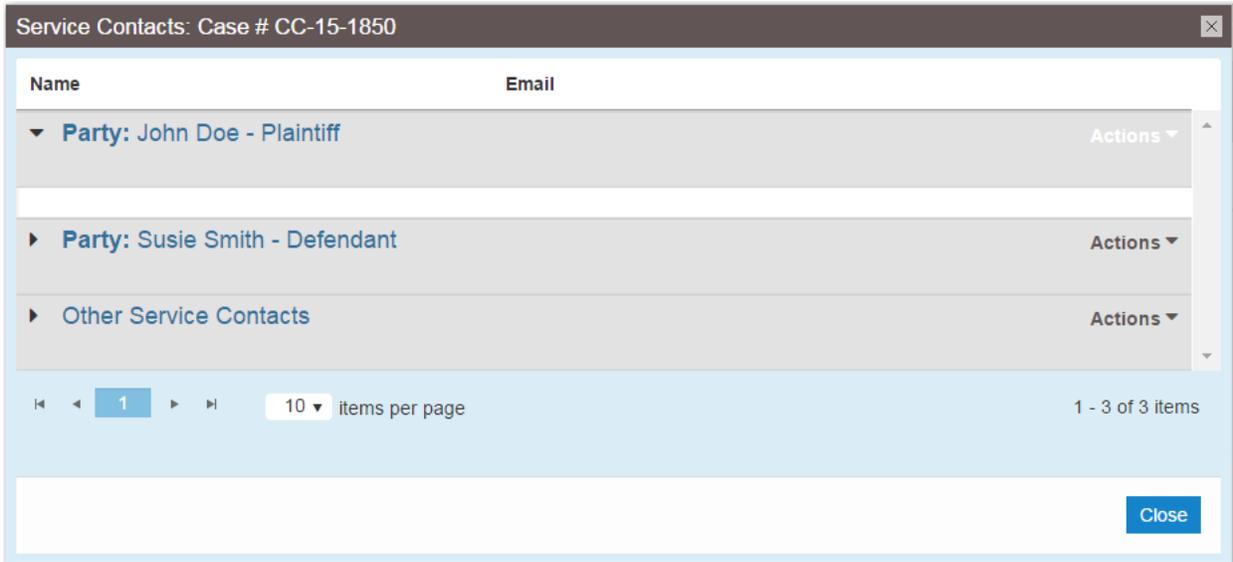


Figure 11.16 – Service Contacts Page

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.

Add Service Contact from Public List [X]

First Name [] Last Name [] Email [] Firm Name [] [Q] [X]

Show Selected Public Service Contacts

Name	Email	Firm
total items		

[Close] [Save]

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.

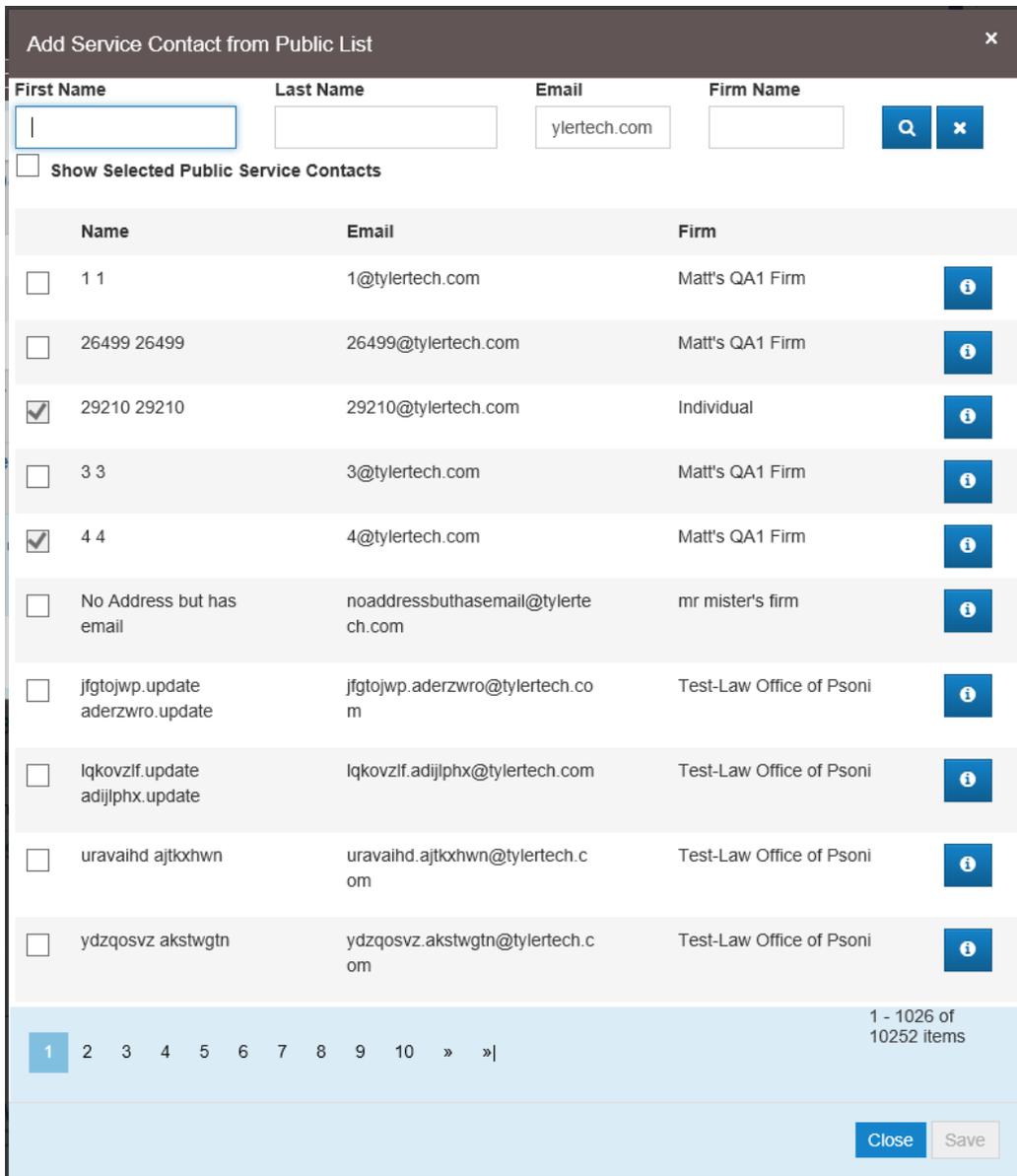


Figure 11.19 – Add Service Contact from Public List Page

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)

Other Service Contacts

Party: None

First Name: George

Middle Name:

Last Name: Adams

Firm Name:

Email: gadams@yahoo.com

Administrative Copy:

Country: United States of America

Make This Contact Public:

Save Contact to Firm Service Contacts:

Address Line 1:

Address Line 2:

City:

State: Click to select State

Zip Code:

Phone Number:

Undo Save Changes

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.

Firm Service Contacts		
<input type="text" value="Search by first or last name"/>		<input type="button" value="Add Service Contact"/>
Name	Email	
mary adams	retrwet@aqwer.com	Actions ▾
George Adams	gadams@yahoo.com	Actions ▾
Jennifer d Anderson	jennifer.anderson@mailinator.com	Actions ▾
john babbitt	johnbabbitt@tylertech.com	Actions ▾
aaa bbb	bbb@tylertech.com	Actions ▾
reggie burbank	asdsa@dsfsd.com	Actions ▾
one contact	one@contact.com	Actions ▾
two sd contact	two@contact.com	Actions ▾
third contact	third@contact.com	Actions ▾
fourth contact	fourth@contact.com	Actions ▾

43 total items

Items per 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.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
▼	Case # CV-2016-019208 - Jimmy Green vs Example Defendant			Envelope # 164073 filed Thursday, April 28, 2016 at 2:22 PM CDT by Tyler FilerSrl	Actions ▼
Accepted	Motion	EFile			
▼	Case # CV-2016-044000 - Happy Farms vs Smiley Acres			Envelope # 164072 filed Monday, August 29, 2016 at 4:50 PM CDT by Tyler FilerSrl, Deferred Until 12:00 AM CDT	Actions ▼
Submission Fai...	Reponse	EFile			
▶	Draft # 164070			Draft # 164070 started Thursday, April 28, 2016 at 2:03 PM CDT by Tyler FilerSrl	Actions ▼
▼	Case # CC-16-462 (Judge, Civil)			Envelope # 164066 filed Thursday, April 28, 2016 at 1:55 PM CDT by Tyler FilerSrl	Actions ▼
Accepted	Acknowledgment	EFileAndServe			
▼	Case # CC-16-462 (Judge, Civil)			Envelope # 163057 filed Thursday, April 28, 2016 at 10:07 AM CDT by Tyler FilerSrl	Actions ▼
Accepted	Motion	EFile			
⏪ ◀ 1 ▶ ⏩ 20 items per page 1 - 8 of 8 items ↻					
Back					

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**.

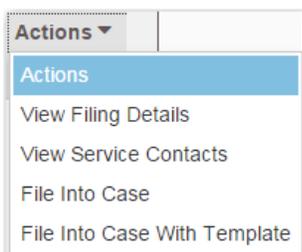


Figure 11.23 – Actions Drop-Down List

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

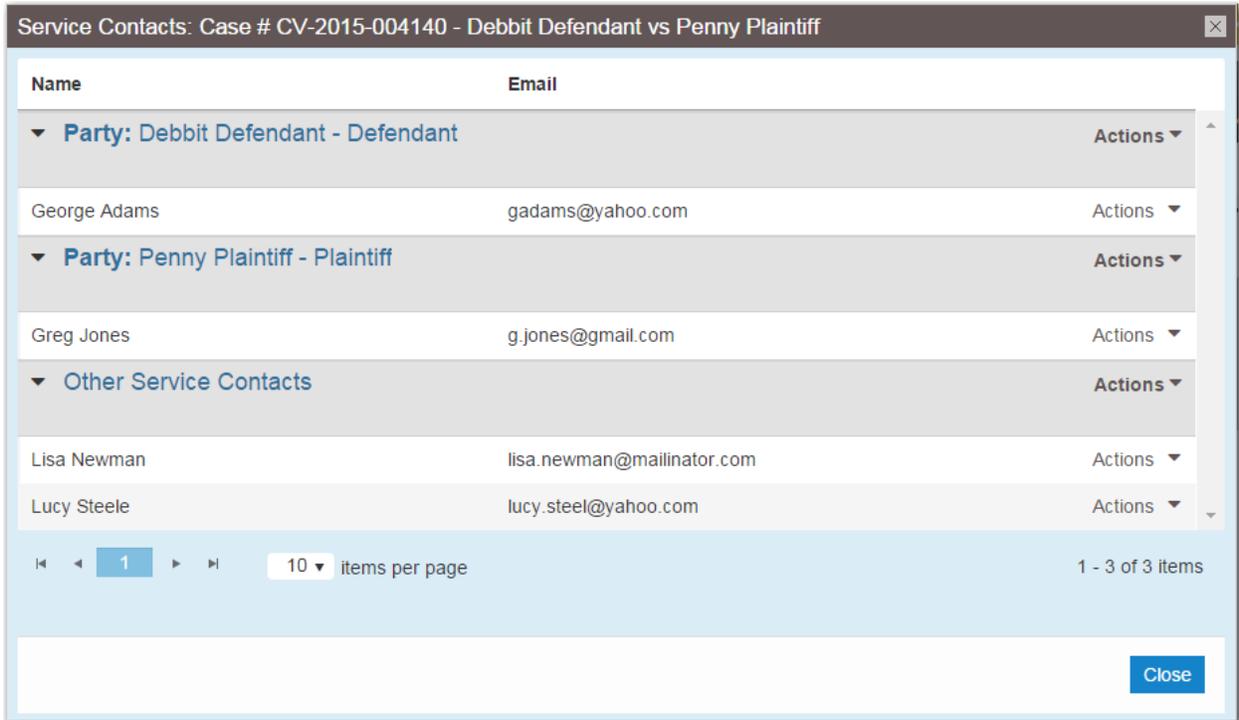


Figure 11.24 – Service Contacts Page

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

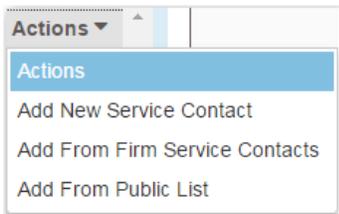


Figure 11.25 – Service Contacts Actions Drop-Down List

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.

- 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.

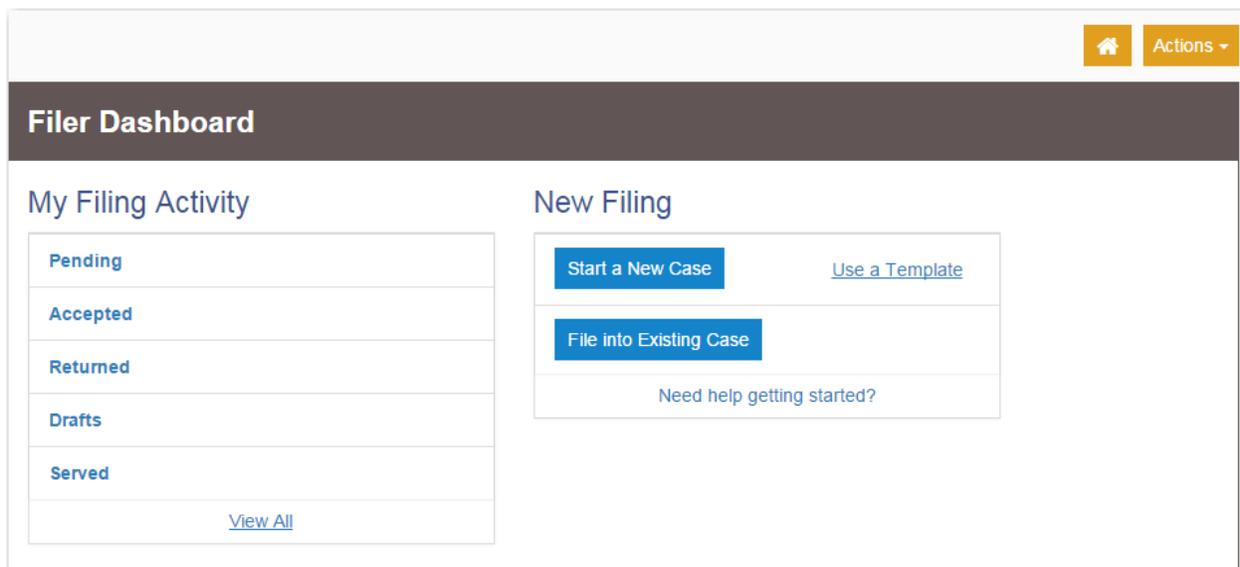


Figure 11.27 – Filer Dashboard Page

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**.

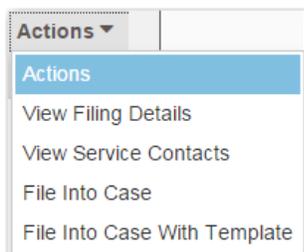


Figure 11.29 – Actions Drop-Down List

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**.

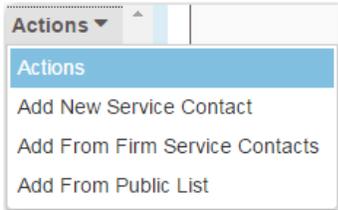


Figure 11.30 – Service Contacts Actions Drop-Down List

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**.

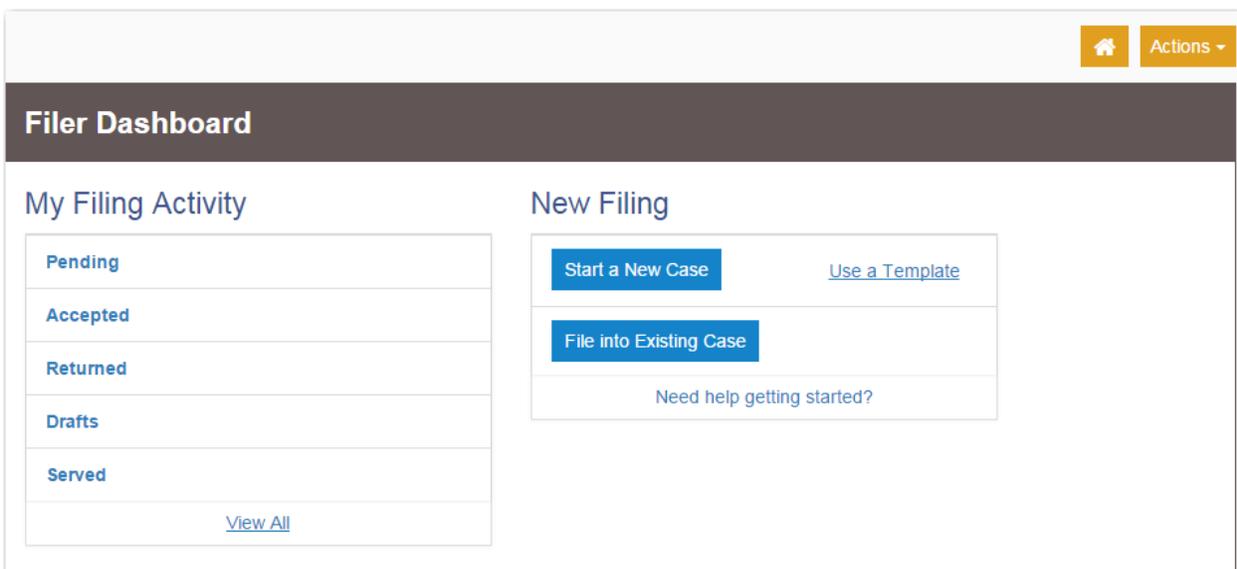


Figure 11.32 – Filer Dashboard Page

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.

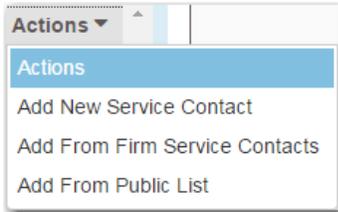


Figure 11.33 – Service Contacts Actions Drop-Down List

- 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

- 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:

- 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.
- 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.
- Complete the fields in the **Party Information** section.
- Enter the filing details for the case in the **Filings** section.
- 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.

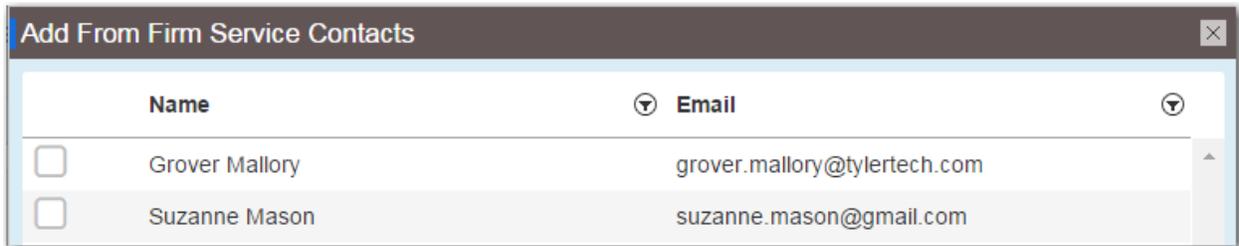


Figure 11.36 – Add From Firm Service Contacts Dialog Box

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.

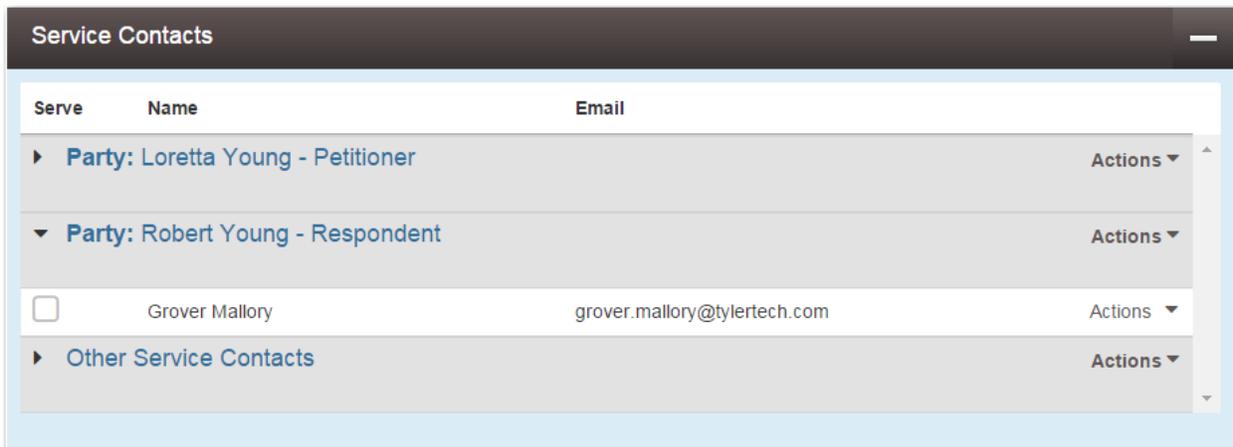


Figure 11.37 – Service Contacts Section

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.

Party: Robert Young - Respondent

Service Method

Click to select Service Method

Click to select Service Method

Mail

EServe

Mary Ann Firm

Middle Name

Last Name

Mallory

Email

grover.mallory@tylertech.com

Administrative Copy

Country

United States of America

Address Line 1

5101 Tennyson

Address Line 2

City

Plano

State

Texas

Zip Code

75024

Phone Number

Undo Save Changes

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.

Service Method

EServe

Click to select Service Method

Mail

EServe

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.

Firm Service Contacts		
Search by first or last name		+ Add Service Contact
Name	Email	
mary adams	retrwet@aqwer.com	Actions ▾
George Adams	gadams@yahoo.com	Actions ▾
Jennifer d Anderson	jennifer.anderson@mailinator.com	Actions ▾
john babbit	johnbabbit@tylertech.com	Actions ▾
aaa bbb	bbb@tylertech.com	Actions ▾
reggie burbank	asdsa@dsfsd.com	Actions ▾
one contact	one@contact.com	Actions ▾
two sd contact	two@contact.com	Actions ▾
third contact	third@contact.com	Actions ▾
fourth contact	fourth@contact.com	Actions ▾

43 total items

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**.

View Contact Details
 Replace Contact
 Delete Contact
 View Attached Case List

Figure 11.41 – Service Contacts Actions Drop-Down List

The attached case list is displayed.

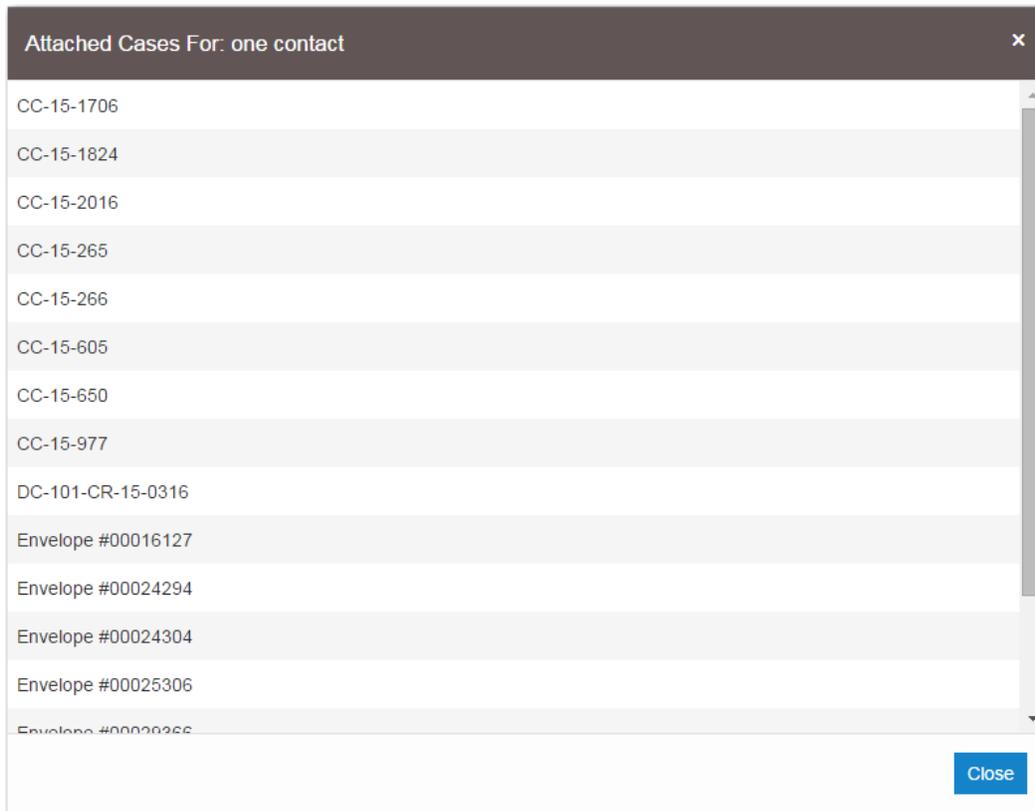


Figure 11.42 – Attached Cases Page

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**.

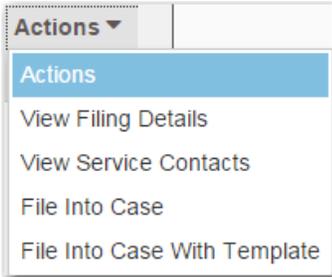


Figure 11.43 – Actions Drop-Down List

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

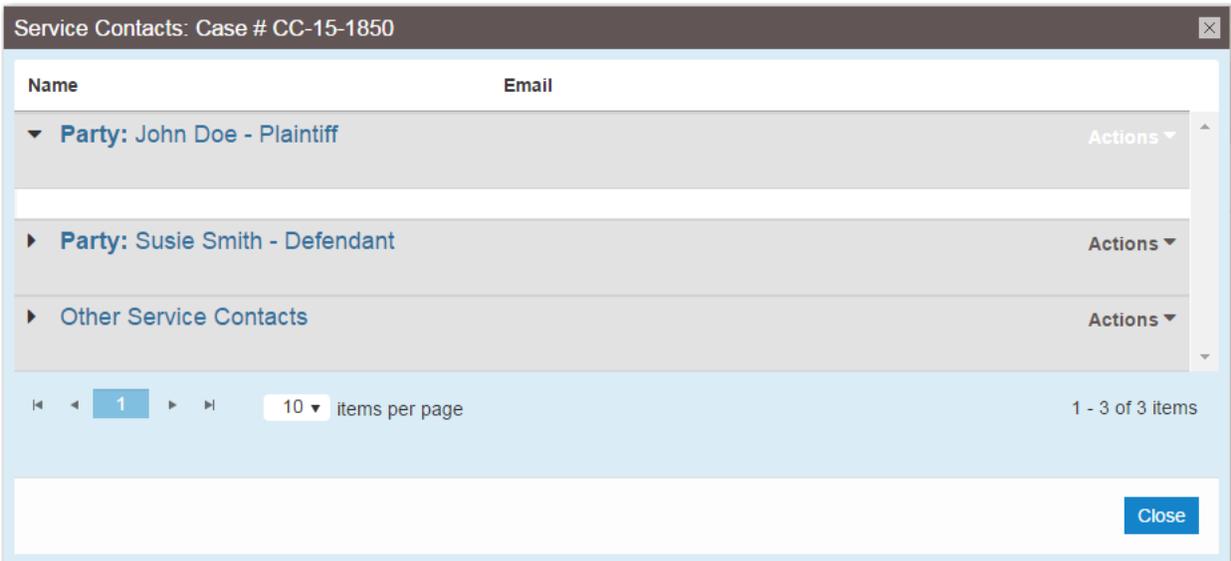


Figure 11.44 – Service Contacts Page

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

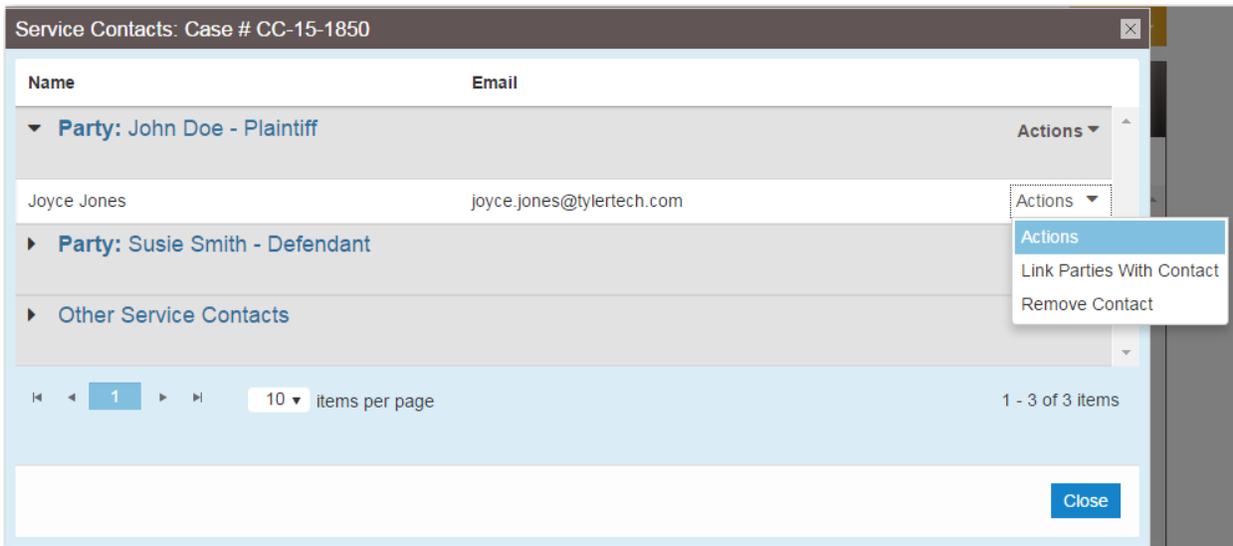


Figure 11.45 – Link Parties with Contact Drop-Down List on the Service Contacts Page

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.

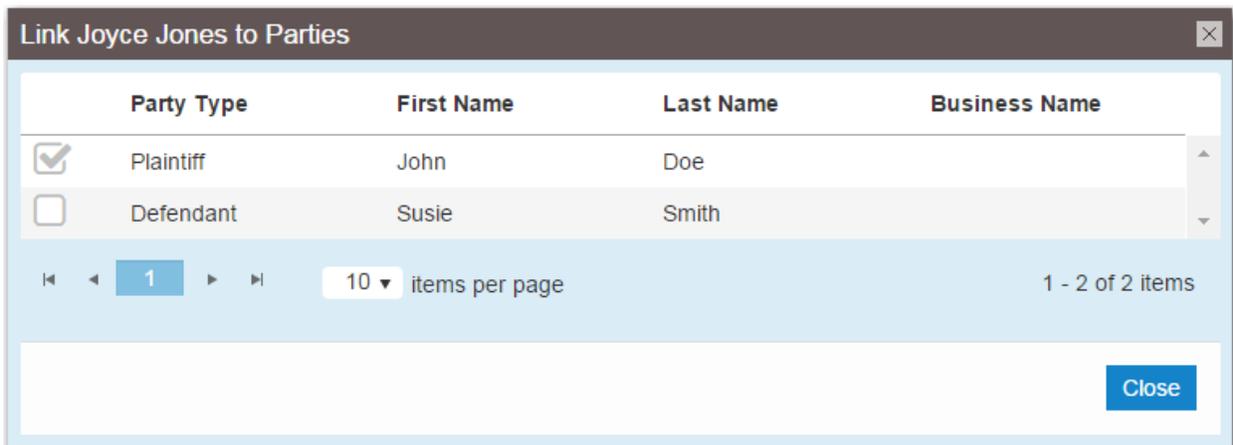


Figure 11.46 – Link Parties Dialog Box

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.

one contact	one@contact.com	Actions ▾
two sd contact	two@contact.com	Actions ▾
third contact	third@contact.com	Actions ▾
fourth contact	fourth@contact.com	Actions ▾

43 total items

Items per page: 10 ▾

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.

Firm Service Contacts

 ⊕ Add Service Contact

Name	Email	Actions ▾
Mary Beth Smith	maryb.smith@abc.com	Actions ▾

Items per page: 10 ▾

1 total items

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.

i 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.

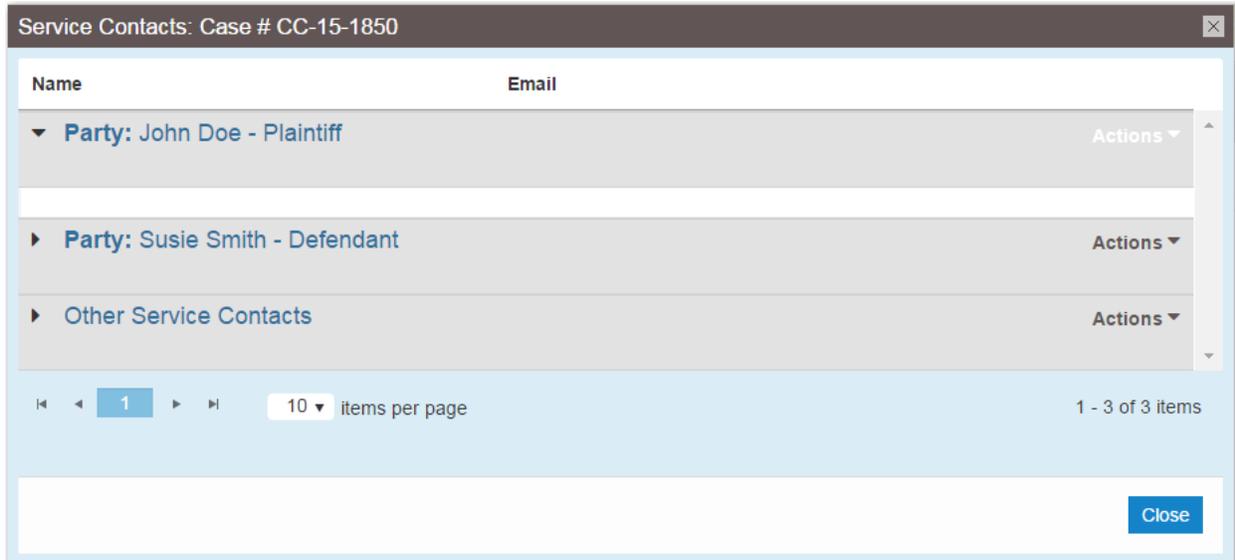


Figure 11.49 – Service Contacts Page

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.

Firm Service Contacts		
Search by first or last name		+ Add Service Contact
Name	Email	
mary adams	retrwet@aqwer.com	Actions ▾
George Adams	gadams@yahoo.com	Actions ▾
Jennifer d Anderson	jennifer.anderson@mailinator.com	Actions ▾
john babbitt	johnbabbitt@tylertech.com	Actions ▾
aaa bbb	bbb@tylertech.com	Actions ▾
reggie burbank	asdsa@dsfsd.com	Actions ▾
one contact	one@contact.com	Actions ▾
two sd contact	two@contact.com	Actions ▾
third contact	third@contact.com	Actions ▾
fourth contact	fourth@contact.com	Actions ▾

43 total items

Items per page: 10 ▾

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.

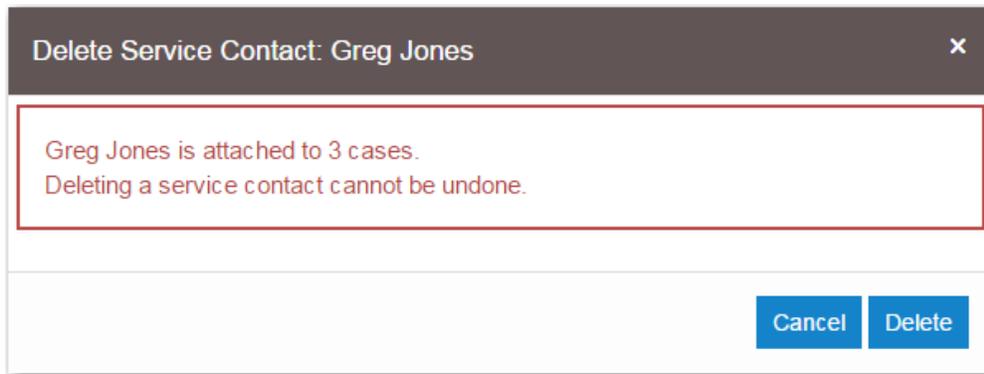
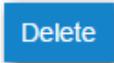


Figure 11.53 – Delete Service Contact Dialog Box

4. Click  to delete the contact, or click  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

- ◆ FILTERING THE FILINGS QUEUE
- ◆ COPYING THE ENVELOPE
- ◆ VIEWING THE ENVELOPE DETAILS
- ◆ RESUMING THE FILING PROCESS
- ◆ CANCELING A FILING

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.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
▼	Case # CV-2016-019208 - Jimmy Green vs Example Defendant			Envelope # 164073 filed Thursday, April 28, 2016 at 2:22 PM CDT by Tyler FilerSrl	Actions ▼
Accepted	Motion	EFile			
▼	Case # CV-2016-044000 - Happy Farms vs Smiley Acres			Envelope # 164072 filed Monday, August 29, 2016 at 4:50 PM CDT by Tyler FilerSrl, Deferred Until 12:00 AM CDT	Actions ▼
Submission Fai...	Reponse	EFile			
▶	Draft # 164070			Draft # 164070 started Thursday, April 28, 2016 at 2:03 PM CDT by Tyler FilerSrl	Actions ▼
▼	Case # CC-16-462 (Judge, Civil)			Envelope # 164066 filed Thursday, April 28, 2016 at 1:55 PM CDT by Tyler FilerSrl	Actions ▼
Accepted	Acknowledgment	EFileAndServe			
▼	Case # CC-16-462 (Judge, Civil)			Envelope # 163057 filed Thursday, April 28, 2016 at 10:07 AM CDT by Tyler FilerSrl	Actions ▼
Accepted	Motion	EFile			
⏪ ◀ 1 ▶ ⏩ 20 items per page 1 - 8 of 8 items ↻					
Back					

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.

Filing History					
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
▼	Case # CV-2016-019208 - Jimmy Green vs Example Defendant			Envelope # 164073 filed Thursday, April 28, 2016 at 2:22 PM CDT by Tyler FilerSrl	Actions ▼
Accepted	Motion	EFile			
▼	Case # CV-2016-044000 - Happy Farms vs Smiley Acres			Envelope # 164072 filed Monday, August 29, 2016 at 4:50 PM CDT by Tyler FilerSrl, Deferred Until 12:00 AM CDT	Actions ▼
Submission Fai...	Reponse	EFile			
▶	Draft # 164070			Draft # 164070 started Thursday, April 28, 2016 at 2:03 PM CDT by Tyler FilerSrl	Actions ▼
▼	Case # CC-16-462 (Judge, Civil)			Envelope # 164066 filed Thursday, April 28, 2016 at 1:55 PM CDT by Tyler FilerSrl	Actions ▼
Accepted	Acknowledgment	EFileAndServe			
▼	Case # CC-16-462 (Judge, Civil)			Envelope # 163057 filed Thursday, April 28, 2016 at 10:07 AM CDT by Tyler FilerSrl	Actions ▼
Accepted	Motion	EFile			
 1  20 items per page 1 - 8 of 8 items 					
<input type="button" value="Back"/>					

Figure 12.2 – Filing History Page

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

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

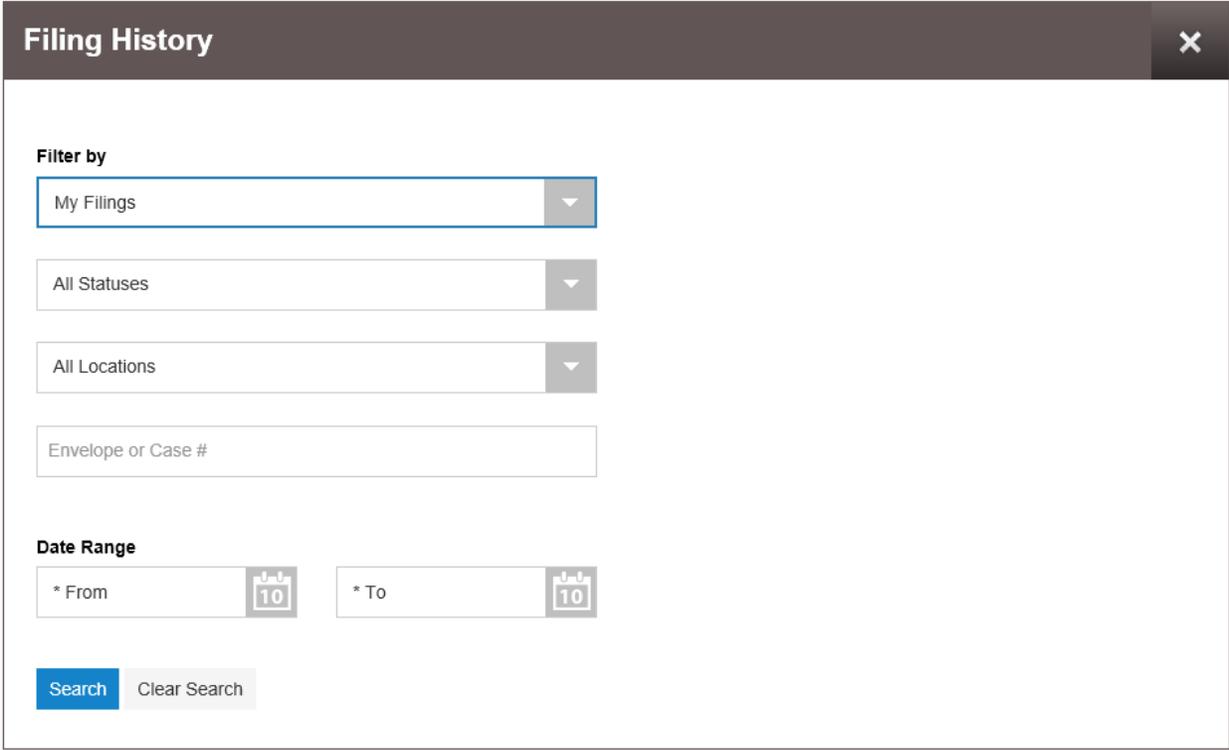


Figure 12.3 – Filing History Page for Filtering a Search

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.

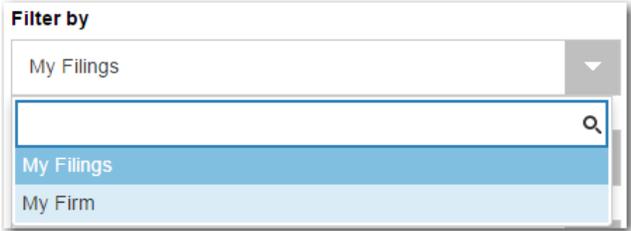


Figure 12.4 – Filter by Drop-Down List

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

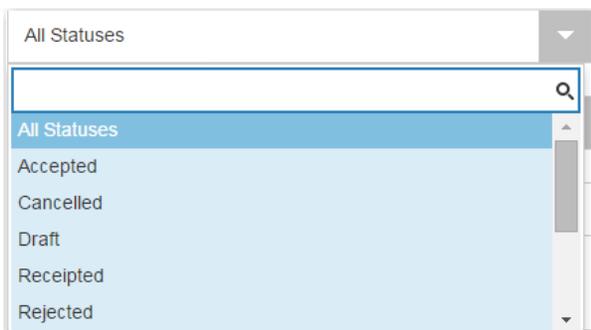


Figure 12.5 – All Statuses Drop-Down List

- 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).

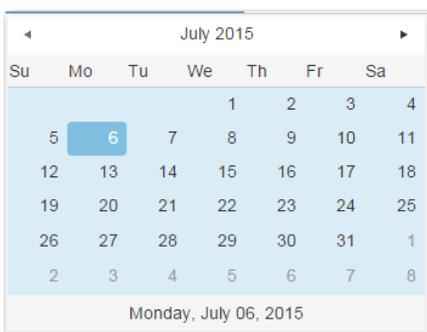


Figure 12.6 – Filter Date Calendar

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.

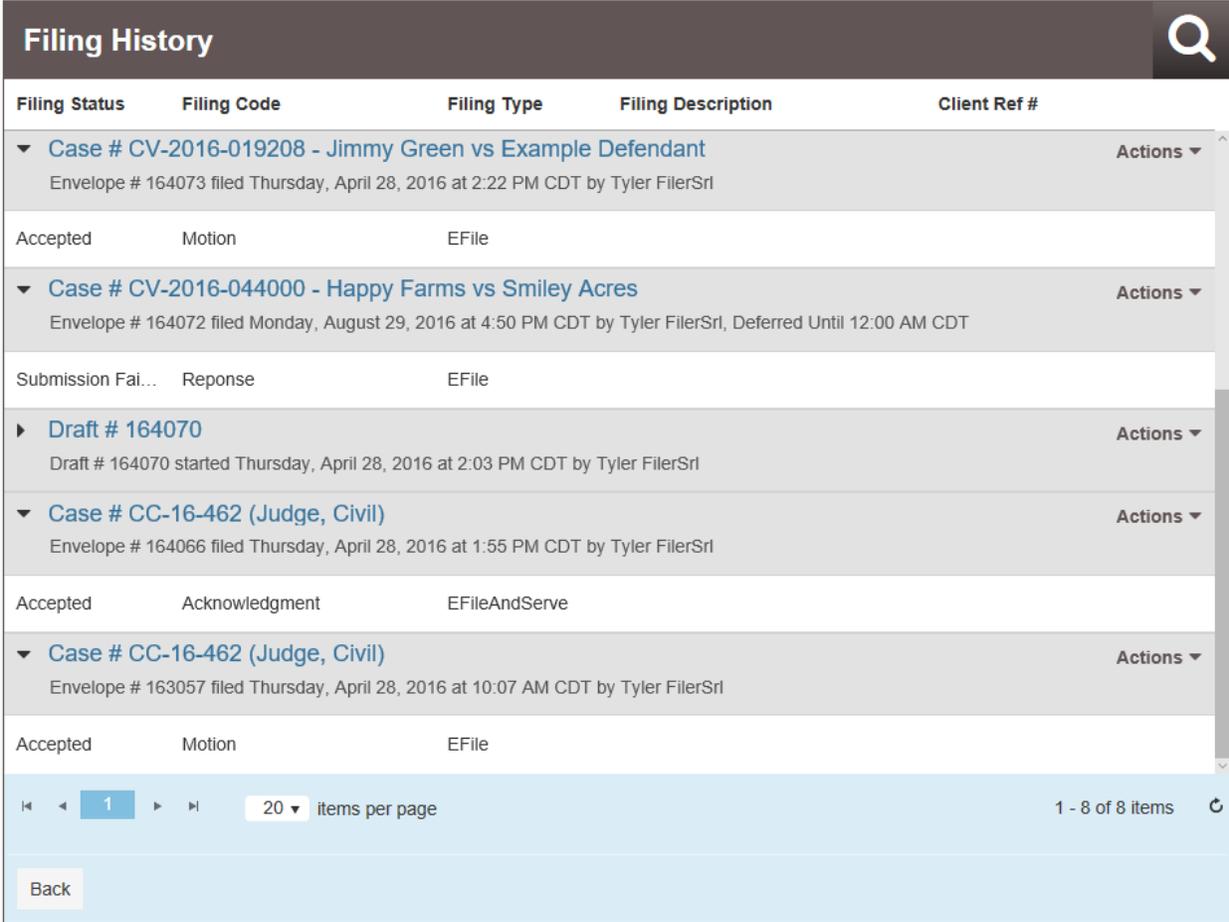


Figure 12.7 – Filing History Page

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

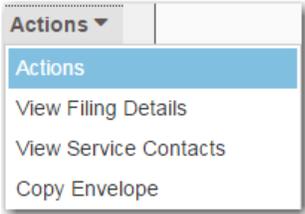


Figure 12.8 – Actions Drop-Down List

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.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
▼	Case # CV-2016-019208 - Jimmy Green vs Example Defendant			Actions ▼	
Envelope # 164073 filed Thursday, April 28, 2016 at 2:22 PM CDT by Tyler FilerSrl					
Accepted	Motion	EFile			
▼	Case # CV-2016-044000 - Happy Farms vs Smiley Acres			Actions ▼	
Envelope # 164072 filed Monday, August 29, 2016 at 4:50 PM CDT by Tyler FilerSrl, Deferred Until 12:00 AM CDT					
Submission Fal...	Reponse	EFile			
▶	Draft # 164070			Actions ▼	
Draft # 164070 started Thursday, April 28, 2016 at 2:03 PM CDT by Tyler FilerSrl					
▼	Case # CC-16-462 (Judge, Civil)			Actions ▼	
Envelope # 164066 filed Thursday, April 28, 2016 at 1:55 PM CDT by Tyler FilerSrl					
Accepted	Acknowledgment	EFileAndServe			
▼	Case # CC-16-462 (Judge, Civil)			Actions ▼	
Envelope # 163057 filed Thursday, April 28, 2016 at 10:07 AM CDT by Tyler FilerSrl					
Accepted	Motion	EFile			
⏪ ◀ 1 ▶ ⏩ 20 items per page 1 - 8 of 8 items ↻					
Back					

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.

Envelope # 190698

Envelope Information

Envelope Id 190698	Submitted Date 9/20/2016 2:08 PM CDT	Submitted User Name pushhorn@jnetech.com
-----------------------	---	---

Case Information

Location ORS QA 2014 Procedures / Remedies Appeal	Category Civil Damages Sought Between \$1000 and \$5000	Case Type Failure to Pay Rent
--	--	----------------------------------

Party Information

Party Type	Party Name	Lead Attorney
Landlord	Beth Litbrell Esq	Blake Bean
Defendant	Jimmy John	

Filings

Filing Code	Client Ref #	Filing Description
Complaint for Repossession of Rent	MV-002312	Bunny Acres Complaint for Repossession of Rent

Filing Details

Filing Type EFile	Filing Code Complaint for Repossession of Rent
Filing Description Bunny Acres Complaint for Repossession of Rent	Client Reference Number MV-002312
Comments to Court Please let me know if you have any questions	Filing Status Submitted

Lead Document

File Name	Description	Security	Download
Sample PDF.pdf (53.50 KB)	Complaint for Repossession of Rent	Public (G)	Original File

Attachments

File Name	Description	Security	Download
Sample PDF.pdf (53.50 KB)	Complaint for Repossession of Rent	Public (G)	Original File

Optional Services and Fees

Optional Services and Fees	Fee Amount	Quantity	Fee Total
Certified Copies	\$6.00	1	\$6.00

Service Contacts +

Fees

▼ Complaint for Repossession of Rent

Description	Amount
Filing Fee	\$0.00
Certified Copies	\$6.00
Filing Total:	\$6.00

Total Filing Fee	\$6.00
Payment Service Fee	\$2.00
EFile Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total:	\$10.00

Party Responsible for Fees	Beth Litbrell	Transaction Amount	\$10.00
Payment Account	AMEX	Transaction Id	172966
Filing Attorney	Issac Moore	Order Id	000190698-0
Transaction Response	Authorized		

[View Filing History](#) [View Receipt](#)

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.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
▼	Case # CV-2016-019208 - Jimmy Green vs Example Defendant			Envelope # 164073 filed Thursday, April 28, 2016 at 2:22 PM CDT by Tyler FilerSrl	Actions ▼
Accepted	Motion	EFile			
▼	Case # CV-2016-044000 - Happy Farms vs Smiley Acres			Envelope # 164072 filed Monday, August 29, 2016 at 4:50 PM CDT by Tyler FilerSrl, Deferred Until 12:00 AM CDT	Actions ▼
Submission Fai...	Reponse	EFile			
▶	Draft # 164070			Draft # 164070 started Thursday, April 28, 2016 at 2:03 PM CDT by Tyler FilerSrl	Actions ▼
▼	Case # CC-16-462 (Judge, Civil)			Envelope # 164066 filed Thursday, April 28, 2016 at 1:55 PM CDT by Tyler FilerSrl	Actions ▼
Accepted	Acknowledgment	EFileAndServe			
▼	Case # CC-16-462 (Judge, Civil)			Envelope # 163057 filed Thursday, April 28, 2016 at 10:07 AM CDT by Tyler FilerSrl	Actions ▼
Accepted	Motion	EFile			
⏪ ◀ 1 ▶ ⏩ 20 items per page 1 - 8 of 8 items ↻					
Back					

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.

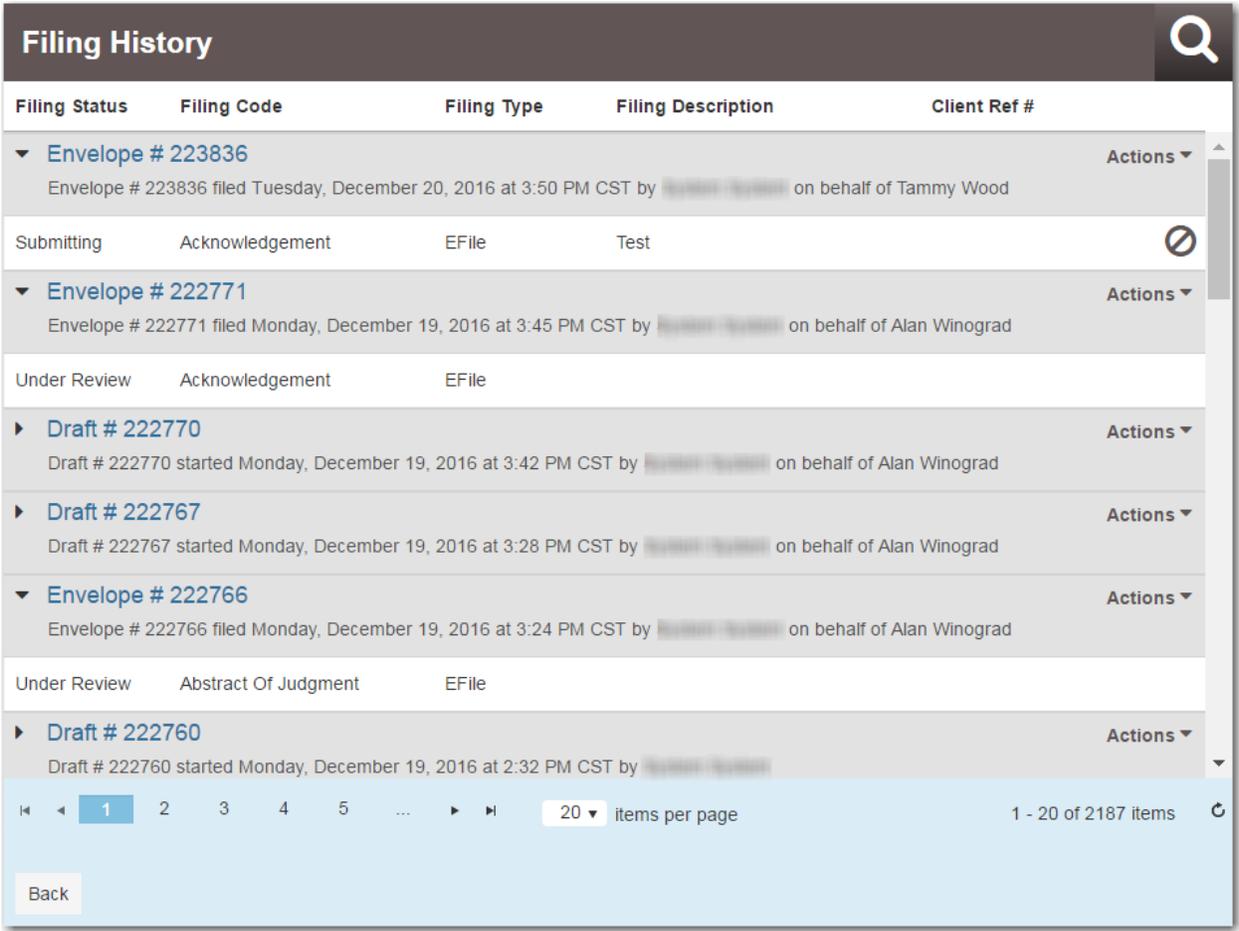
To cancel the filing, perform the following steps:

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.



The screenshot shows the 'Filing History' page with a search icon in the top right. The table below lists various filings with columns for Filing Status, Filing Code, Filing Type, Filing Description, and Client Ref #. The first row, 'Envelope # 223836', is expanded to show details: 'Submitting' status, 'Acknowledgement' code, 'EFile' type, and 'Test' description. A cancel icon (a square with a diagonal slash) is visible in the 'Actions' column for this row. Other rows include 'Envelope # 222771', 'Draft # 222770', 'Draft # 222767', 'Envelope # 222766', and 'Draft # 222760'. At the bottom, there is a pagination bar showing '1' of 20 items per page, and a 'Back' button.

Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	Actions
▼ Envelope # 223836	Envelope # 223836 filed Tuesday, December 20, 2016 at 3:50 PM CST by [REDACTED] on behalf of Tammy Wood				Actions ▼
Submitting	Acknowledgement	EFile	Test		
▼ Envelope # 222771	Envelope # 222771 filed Monday, December 19, 2016 at 3:45 PM CST by [REDACTED] on behalf of Alan Winograd				Actions ▼
Under Review	Acknowledgement	EFile			
▶ Draft # 222770	Draft # 222770 started Monday, December 19, 2016 at 3:42 PM CST by [REDACTED] on behalf of Alan Winograd				Actions ▼
▶ Draft # 222767	Draft # 222767 started Monday, December 19, 2016 at 3:28 PM CST by [REDACTED] on behalf of Alan Winograd				Actions ▼
▼ Envelope # 222766	Envelope # 222766 filed Monday, December 19, 2016 at 3:24 PM CST by [REDACTED] on behalf of Alan Winograd				Actions ▼
Under Review	Abstract Of Judgment	EFile			
▶ Draft # 222760	Draft # 222760 started Monday, December 19, 2016 at 2:32 PM CST by [REDACTED]				Actions ▼

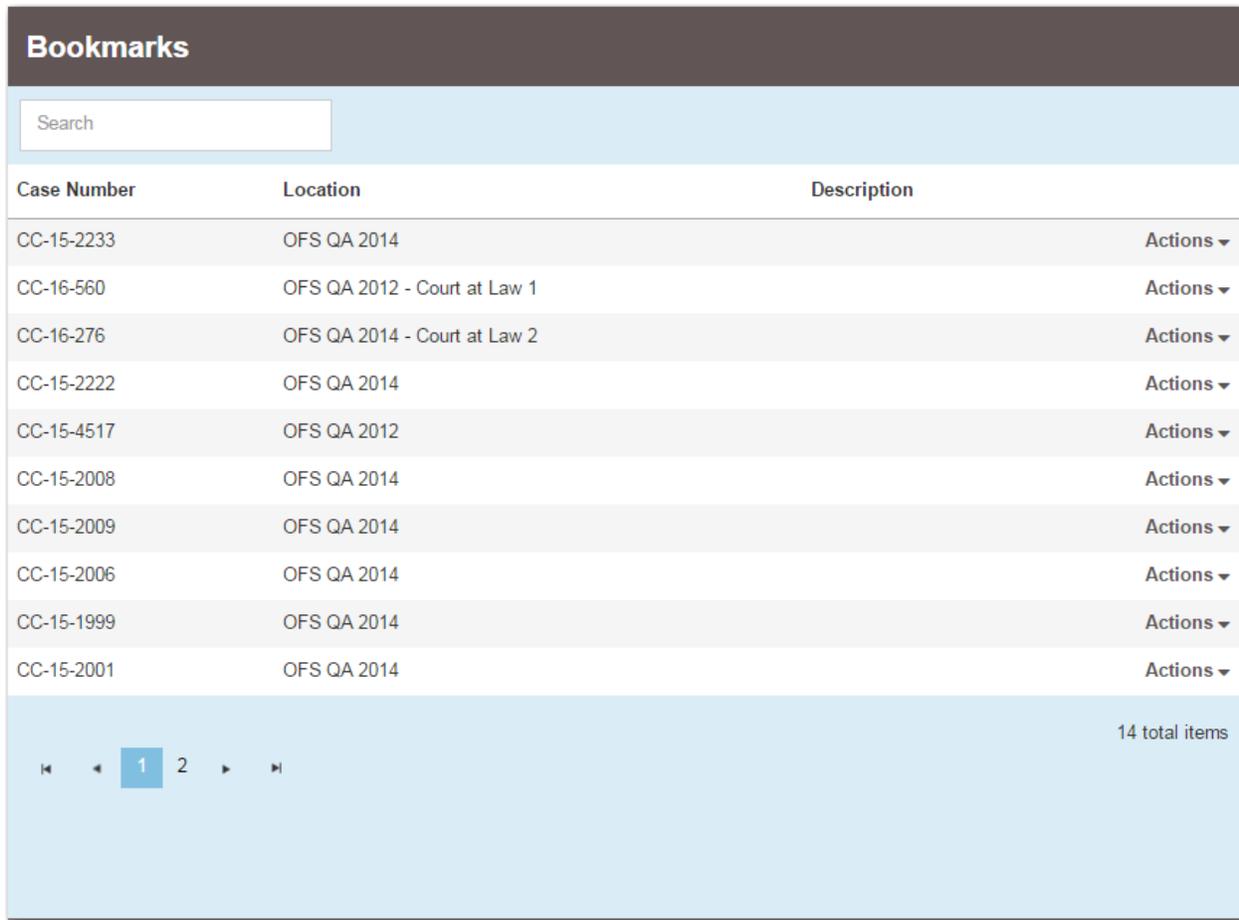
◀ 1 2 3 4 5 ... ▶ 20 items per page 1 - 20 of 2187 items

Back

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.



The screenshot shows the 'Bookmarks' page interface. At the top, there is a search bar with the placeholder text 'Search'. Below the search bar is a table with three columns: 'Case Number', 'Location', and 'Description'. The table contains ten rows of case data. Each row has an 'Actions' dropdown menu to its right. At the bottom of the table, there are pagination controls showing '1' and '2' with arrows, and a total count of '14 total items' on the right side.

Case Number	Location	Description	Actions
CC-15-2233	OFS QA 2014		Actions ▾
CC-16-560	OFS QA 2012 - Court at Law 1		Actions ▾
CC-16-276	OFS QA 2014 - Court at Law 2		Actions ▾
CC-15-2222	OFS QA 2014		Actions ▾
CC-15-4517	OFS QA 2012		Actions ▾
CC-15-2008	OFS QA 2014		Actions ▾
CC-15-2009	OFS QA 2014		Actions ▾
CC-15-2006	OFS QA 2014		Actions ▾
CC-15-1999	OFS QA 2014		Actions ▾
CC-15-2001	OFS QA 2014		Actions ▾

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
- ◆ CREATING A FILINGS REPORT

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.

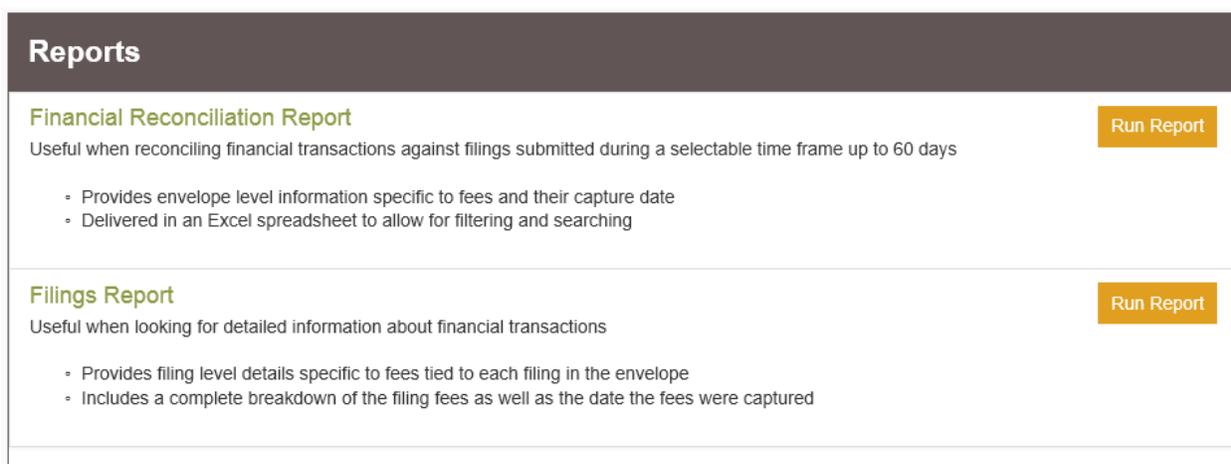


Figure 14.1 – Reports Page

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

Run Report

Reports

Financial Reconciliation Report

Useful when reconciling financial transactions against filings submitted during a selectable time frame up to 60 days

- Provides envelope level information specific to fees and their capture date
- Delivered in an Excel spreadsheet to allow for filtering and searching

Report Parameters

Filings Submitted By

From  **To** 

Locations

Status

Filings Report

Useful when looking for detailed information about financial transactions

- Provides filing level details specific to fees tied to each filing in the envelope
- Includes a complete breakdown of the filing fees as well as the date the fees were captured

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).

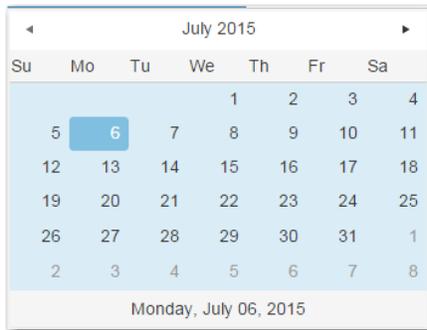


Figure 14.3 – Filter Date Calendar

- 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.

Reports	
Financial Reconciliation Report Useful when reconciling financial transactions against filings submitted during a selectable time frame up to 60 days <ul style="list-style-type: none">• Provides envelope level information specific to fees and their capture date• Delivered in an Excel spreadsheet to allow for filtering and searching	Run Report
Filings Report Useful when looking for detailed information about financial transactions <ul style="list-style-type: none">• Provides filing level details specific to fees tied to each filing in the envelope• Includes a complete breakdown of the filing fees as well as the date the fees were captured	Run Report

Figure 14.5 – Reports Page

2. In the **Filings Report** panel, click [Run Report](#) .

Reports

Financial Reconciliation Report

Useful when reconciling financial transactions against filings submitted during a selectable time frame up to 60 days

- Provides envelope level information specific to fees and their capture date
- Delivered in an Excel spreadsheet to allow for filtering and searching

Run Report

Filings Report

Useful when looking for detailed information about financial transactions

- Provides filing level details specific to fees tied to each filing in the envelope
- Includes a complete breakdown of the filing fees as well as the date the fees were captured

Report Parameters

Filings Submitted By

From  **To** 

Locations All Select 

Status All

Reset

Select 

Cancel

Download Report

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).

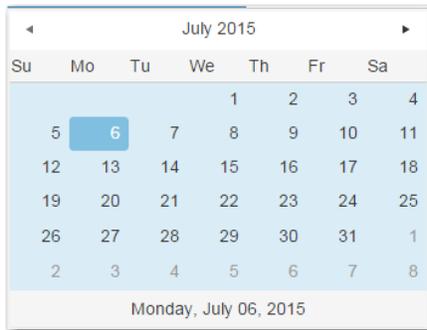


Figure 14.7 – Filter Date Calendar

- 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 **Download Report** to run the report, or click **Cancel** 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 .