

# File and Serve Quick Guide

## How To Initiate New Case Filing

### How to Initiate New Case

This reference guide contains the following sections for entering a new **civil** complaint into Odyssey:

- How to sign into File and Serve
- Initiating a New Case
- Adding Party Case Information for the Plaintiff
- Adding Other Party Information

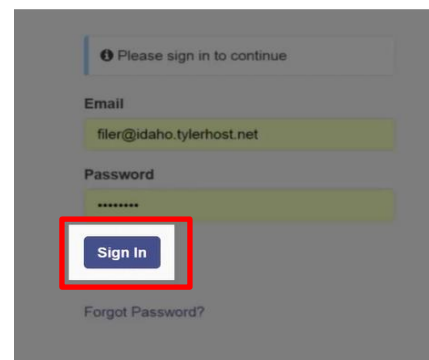
### Sign In to File and Serve

1. On the Home page click on the Sign In icon.



2. Type in your user email address and password and click the Sign In button. This is the username and password established when you registered in File and Serve.

When you press enter you will be moved to the Filer Dashboard where you can initiate a new case.



### Initiating a New Case

There are two ways to initiate a new case:

1. Click on the Actions button at the top right corner of the Filer Dashboard and from the drop down menu, select Start a New Case.
2. Click on the Start a New Case button in the center of the screen.

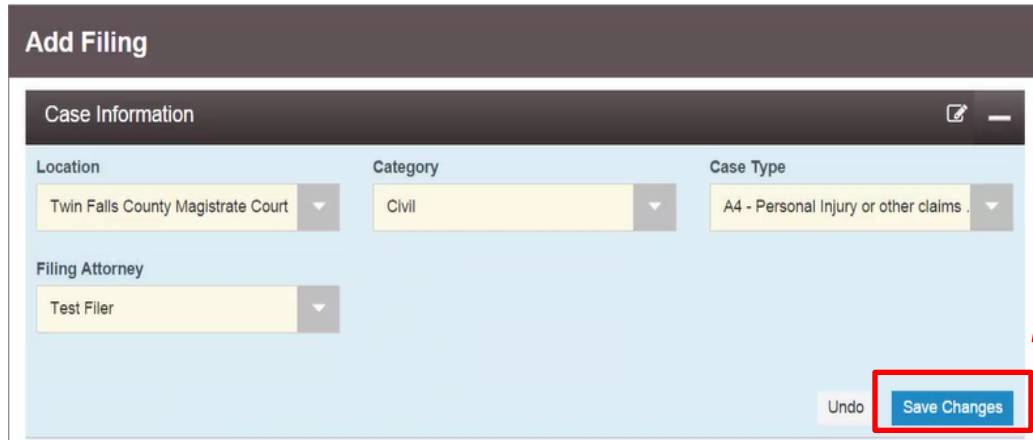
### Adding Case Information

1. From the Add a Filing Screen enter the case information into the application. Click on each of the follow down arrows to access the menus for each of the following fields: Location, Category, Case Type, Filing Attorney

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2. Once you have entered all the case information, select the Save Changes button at the bottom right of the screen.



The screenshot shows the 'Add Filing' form with the following details:

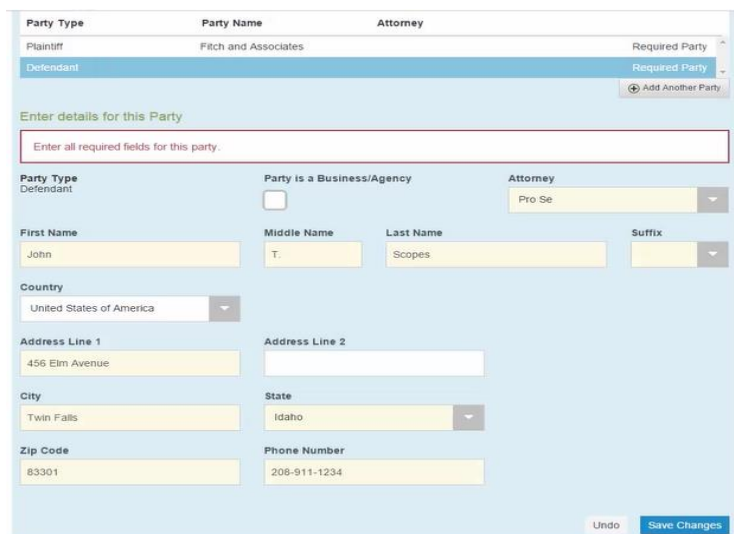
- Case Information** section with three dropdown menus:
  - Location: Twin Falls County Magistrate Court
  - Category: Civil
  - Case Type: A4 - Personal Injury or other claims
- Filing Attorney** dropdown menu: Test Filer
- Buttons at the bottom right: Undo and Save Changes (highlighted with a red box and a red arrow pointing to it).

3. Based on the selections you made in the case information section, the party information will populate with the required party types.

### Entering Party Information for the Plaintiff/Petitioner

1. If the plaintiff is a business, check the Party is a Business/Agency box in the center of the screen.
2. To enter the attorney, click on the drop down menu and find the attorney for the case you are filing on behalf of.
3. When you have entered all of the information, click the Save Changes button at the bottom right of the screen.

Only the fields that are highlighted in red are required.



The screenshot shows the party information form with the following details:

- Party Type**: Plaintiff (highlighted in red)
- Party Name**: Fitch and Associates
- Attorney**: (highlighted in red)
- Required Party**: (highlighted in red)
- Defendant**: (highlighted in red)
- Enter details for this Party** section with a red border and a red box around the text 'Enter all required fields for this party.'
- Party Type**: Defendant
- Party is a Business/Agency**:
- Attorney**: Pro Se
- First Name**: John
- Middle Name**: T.
- Last Name**: Scopes
- Suffix**: (highlighted in red)
- Country**: United States of America
- Address Line 1**: 456 Elm Avenue
- Address Line 2**: (highlighted in red)
- City**: Twin Falls
- State**: Idaho
- Zip Code**: 83301
- Phone Number**: 208-911-1234
- Buttons at the bottom right: Undo and Save Changes

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### Adding Other Party Information

1. Enter other party information in the required fields highlighted in red. Other party information may also be added.
2. Click on the Save Changes button in the lower right corner of the screen.
3. If necessary, you may click on + Add Another Party and fill in required information and click Save Changes.

The screenshot shows the 'Filings' form in the iCourt E-File system. At the top, there is a table with columns for Party Type, Party Name, and Attorney. Below this, there are two rows of party information. The first row shows 'Plaintiff' with 'Atticus Finch' as the party name and 'Test Filer' as the attorney. The second row shows 'Defendant' with 'John T. Scopes' as the party name and 'Test Filer' as the attorney. There are 'Required Party' dropdown menus for each row and an 'Add Another Party' button. Below the table is the 'Filings' form itself. It has a title 'Enter the details for this filing'. The form includes a 'Filing Type' dropdown menu set to 'Efile', a 'Filing Code' dropdown menu set to 'Complaint', a 'Filing Description' text field containing 'Complaint for Eviction', a 'Reference Number' text field containing '15308', a 'Filing Comments' text field, a 'Courtesy Copies' text field containing 'client1@email.com, client2@email.com', and a 'Lead Document (Required)' field with a 'Select a file to upload' button. At the bottom of the form, there is a large red banner that reads 'PDF Format only' and two buttons: 'Undo' and 'Save Changes'.

### Enter a Filing

1. In the Filing Type field, select E-File from the drop down menu.
2. In the Filing Code field, select the proper code from the drop down menu.
3. In the Filing Description field, provide a complete title of the pleading.
4. Place the internal client tracking number in the Reference Number field. (Optional)
5. Enter Filing Comments, **if any**, for court review in the Filing Comments field.
6. If you want to send courtesy copies to another party such as a client, enter the email address into the Courtesy Copies field. Separate each email address with a comma.
7. Upload documents into the Lead Document field. Any document requiring a file stamp is loaded as a lead document  
*Note: to avoid having a filing rejected, upload the all documents in pdf format.*
8. In the Security field, select a level of security from the drop down menu.
9. Click on Save Changes in the lower right hand corner of the screen.
10. If necessary, you may click on + Add Another Filing to load additional documents. Follow the same steps above to do so and click Save Changes when done.

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Party Type	Party Name	Attorney	
Plaintiff	Atticus Finch	Test Filer	Required Party
Defendant	John T. Scopes		Required Party
<a href="#">+ Add Another Party</a>			

Filing Code	Reference Number	Filing Description	Actions
Complaint	15308	Complaint for Eviction	<a href="#">+ Add Another Filing</a>

Enter the details for this filing

**Filing Type**  
EFile

**Filing Code**  
Complaint

**Filing Description**  
Complaint for Eviction

**Reference Number**  
15308

**Filing Comments**

**Courtesy Copies**  
client1@email.com, client2@email.com

**Lead Document (Required)**  
Complaint.pdf 79.19 KB

**Description**  
Complaint.pdf

**Security**  
Public

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

### Fees

1. In the Payment Account field, select a method of payment that will be used to pay the processing fees.
2. Select the Party Responsible for Fees drop down menu and select the name of the person you are representing and filing on behalf of in this case.
3. Click Save Changes.
4. Click Continue in the lower left corner of the screen. This will automatically take the filer to a review screen where all information provided on the case should be reviewed and verified.

### Verify the Information Filed

1. From this "Draft" screen, review and verify the information in the following fields:
  - a. Case Information
  - b. Party Information
  - c. Filings
  - d. Fees

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2. Once all the information on the page is verified, scroll down the page click on the Submit button in the lower left hand corner of the Fees screen.

### Email Confirmation of Filing

Shortly after submitting a filing the filer will receive an email indicating the submitted file was received. Upon court clerk review you will receive a second email indicating if your submission was accepted or rejected by the court.

If the filing was accepted by the court, the filer will receive a second email with the following information:

- a. Case Number
- b. Link to the Filed Documents

If the filing was rejected, the filer will receive an email indicating the reason(s) for rejection and the filer will be expected to resubmit.

*Note:* It is recommended you promptly review and download all documents upon receiving them as they will only be available via the sent link for a limited period of time.

### Review All Filing Information – Filer Dashboard

A user may review all the information regarding the submitted filing (as well as other filings) from the Filer Dashboard page.

