Odyssey File & Serve™

User Guide – Release 3.15

Copyright and Confidentiality

Contents

Chapter 1 Release 3.15 New Features

The following are new features for Release 3.15.

Note: Features vary based on your system configuration.

Error on Long File Name Submission

The system now displays an error message when the lead document file name is too long.

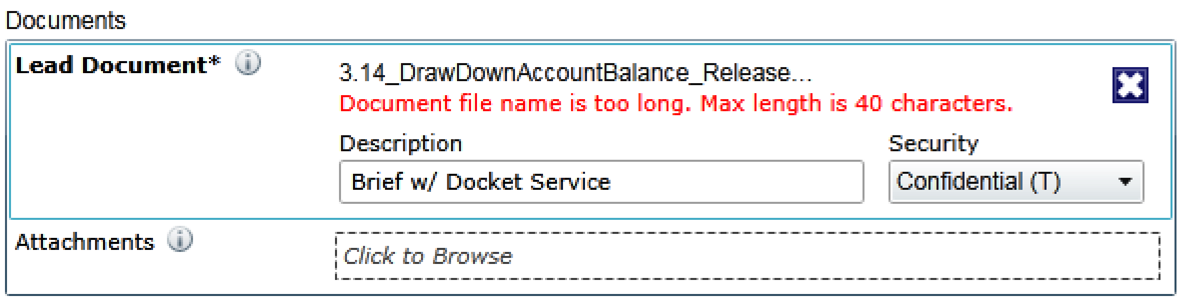


Figure 1.1 – Entering Filing Details Page

Comments on Print Preview Page

The system now displays the **Comments** section on the **Print Preview** page.

Print this page

Case # CC-15-3281

Case Information	
Location	OFS QA 2012
Date Filed	
Case Number	CC-15-3281
Case Description	
Assigned to Judge	
Attorney	
Firm Name	
Filed By	Individual Filer
Fees	
Convenience Fee	$0.00
Total Court Case Fees	$0.00
Total Court Party Fees	$0.00
Total Court Filing Fees	$0.00
Total Court Service Fees	$0.00
Total Filing & Service Fees	$0.00
Total Service Tax Fees	$0.00
Total Provider Service Fees	$0.00
Total Provider Tax Fees	$0.00
Grand Total	$0.00
Payment	
Account Name	eCheck
Transaction Amount	$0.00
Transaction Response	
Transaction ID	
Order #	

Abstract Of Judgment	
Filing Type	EFile
Filing Code	Abstract Of Judgment
Filing Description	
Reference Number	
Comments	
Status	Draft
Fees	
Court Fee	$0.00
Service Fee	$0.00

Documents		
Lead Document	Basic Color.pdf	[Original]

Figure 1.2 – Print Preview Page

Chapter 2 System Overview

Topics Covered in This Chapter

♦ Before You Begin

This 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.

Before You Begin

Before you begin, there are several items you should be aware of to assist you with the successful operation of your software.

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

Preparing your Case

This section describes the steps to successfully file and serve your case.

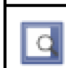
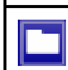
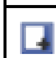
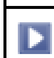
To e-file successfully, complete the following:

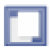
- Ensure all documents are completed and signed.
- Convert all documents you plan to e-file into PDF.
- Check the court rules for required forms, pleadings, and other filings.
- Compile documents into a working directory for easy access while uploading to e-file.

Once the preceding steps are completed, proceed to the home page to submit a filing transaction.

Filing Icons

Several icons are displayed during the file and serve process. The table below explains the different icons on the screens as you move around the application.

Icon	Description
	Deactivate the user, unbookmark the case, delete the party, delete a filing, delete a draft envelope, delete a template.
	Manage your service contacts.
	View the service contact, filing, or template details.
	File into the case.
	Bookmark the case.
	Resume the draft envelope.

Icon	Description
	Cancel the filing.
	Copy the envelope or filing.
	Add template to My Favorites folder.
	Edit a template in the workspace, or link a service contact to a case.
	View attached case list.
	Replace service contacts.

System Requirements

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

- **Browser Requirements** – The system supports current versions of the Windows operating system using Internet Explorer 7 or above or Firefox. If your browser does not meet these minimum requirements, please contact your network administrator.
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Minimum Screen Resolution** – For best results, a setting of 1024x768 or better is highly recommended. If necessary, users can set their monitors to 800x600 pixels, but doing so may compromise the graphic display.
- **Document Format** – PDF is the only format allowed for attaching documents when using the system.

Page Navigation

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

Navigate with Breadcrumbs

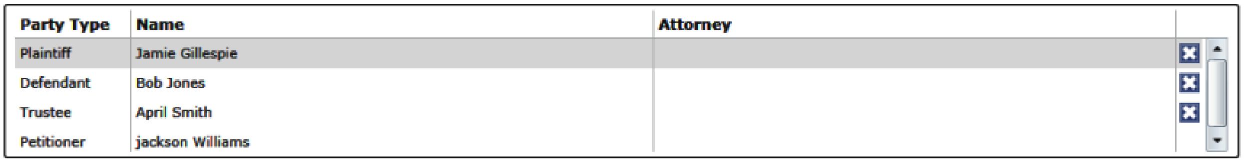
Breadcrumbs are a visual representation of the page you are currently on in the filing process. As you complete a page, the next page's title illuminates to show where you are in the process.

Note: Breadcrumb navigation requires information to be entered in a sequential order. You cannot move to the next breadcrumb until all of the required information on the current or previous page is completed.

Figure 2.1 – Breadcrumb Navigation

Populate the Data Table

The Data Title is populated using information entered or selected when completing the forms throughout the filing process.



Party Type	Name	Attorney
Plaintiff	Jamie Gillespie	
Defendant	Bob Jones	
Trustee	April Smith	
Petitioner	jackson Williams	

Figure 2.2 – Data Table

Enter User Information

The user information you enter or select populates the Data Table.

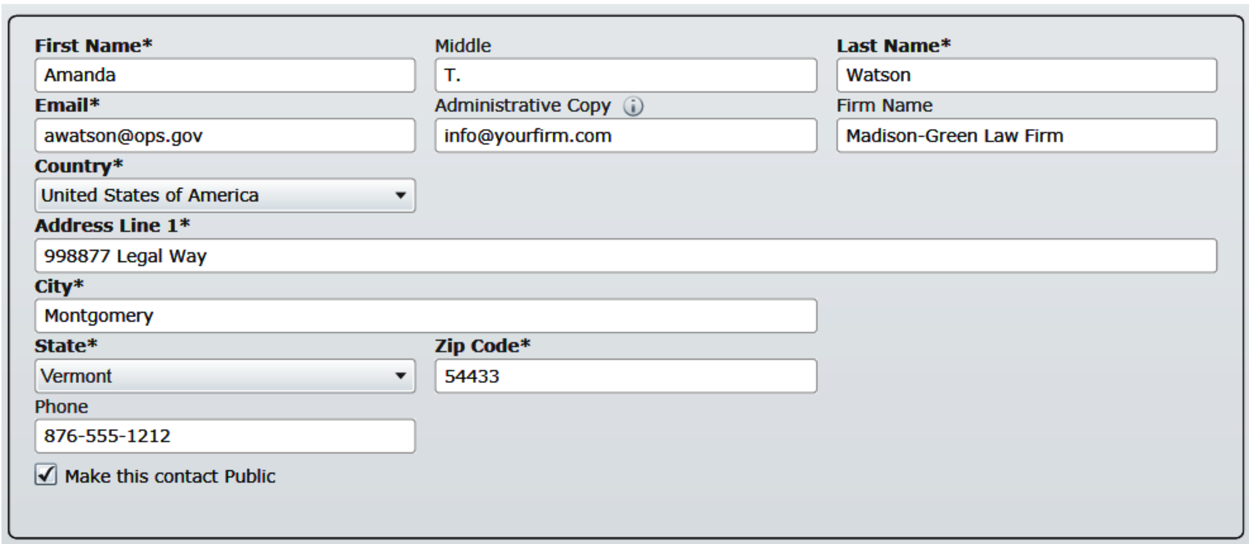


Figure 2.3 – Data Fields

Resume Filing

At any point in the filing process, the system automatically saves a draft of the page on which you have completed all required fields. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing of a saved draft, click the WORKSPACE link at the top of the page, find your case on the *FILINGS* screen, and click the icon to resume your filing.

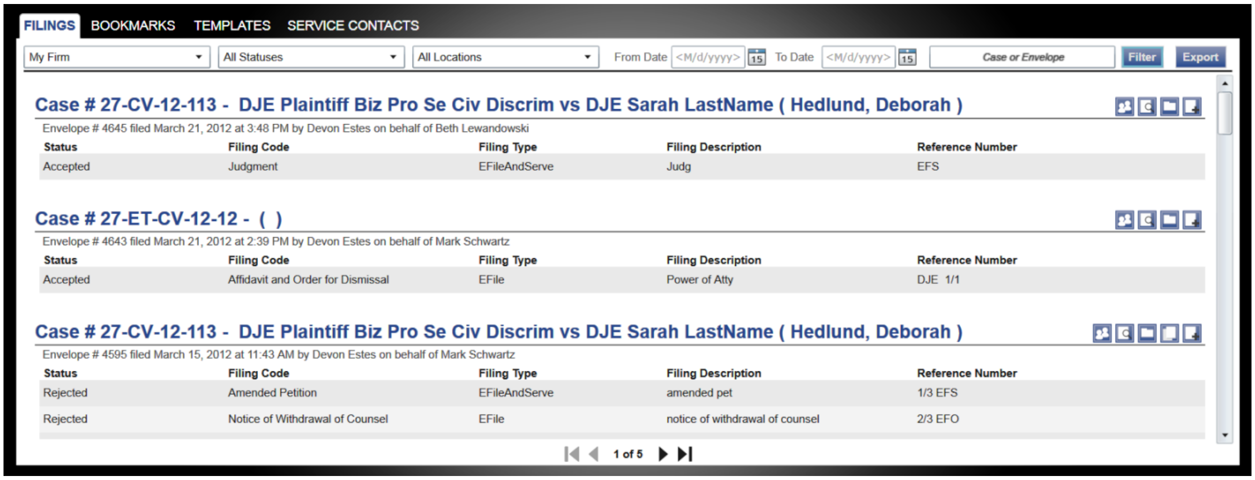


Figure 2.4 – Work Space

Error Messages

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

Password Reset Errors Scenarios

Invalid User – To reset the password for your account, you will need to provide the username for the account and answer the security question for the account.

Note: That user does not exist.

No Security question on File – No security question on file for (username). Your firm administrator may still reset your password.

Note: Reset your password.

Enter Data in Required Fields

Required fields are those that contain an asterisk (*) next to the field name. If you don't enter the information required into a required field and try to advance, you will receive error messages.

Note: Required fields may vary in different sections.

Look for a field outlined in red in your form. Place a cursor on the outline of the field, a required field message is displayed.

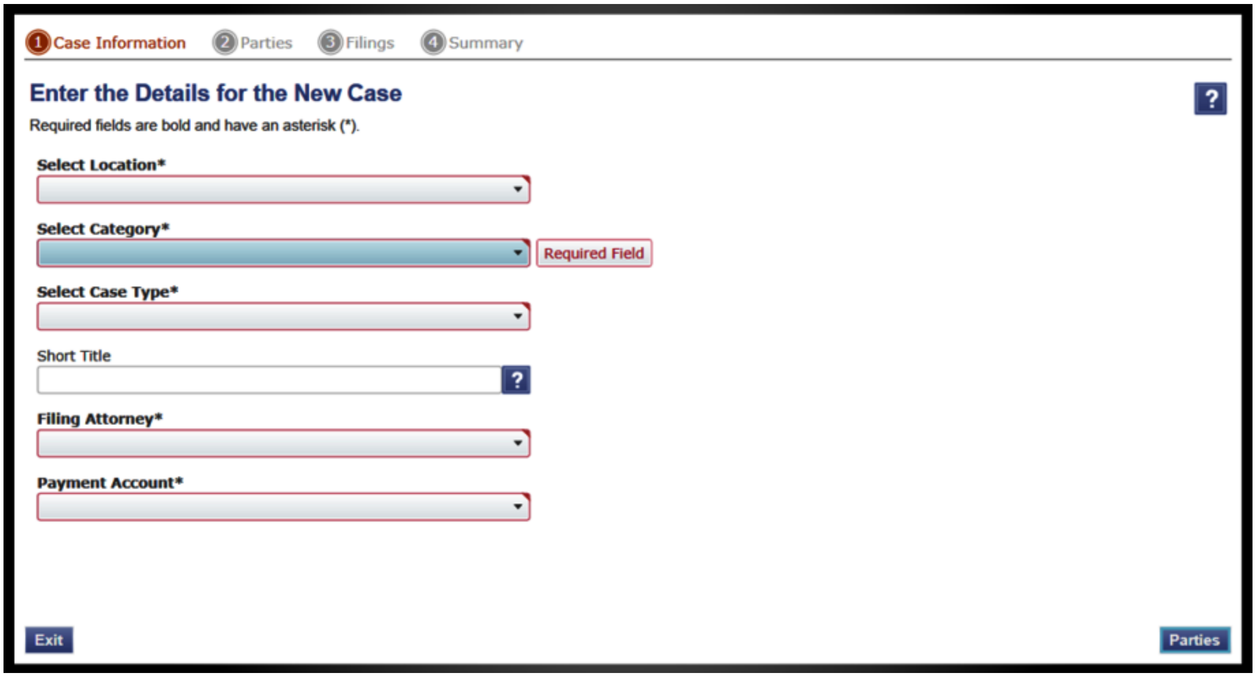


Figure 2.5 – Required Field Error Message

Receive Error Messages

When an invalid error message is displayed, this means that a required field must be populated to continue.

If the screen does not change when a navigation button is selected, look for a field outlined in red in your form. Place a cursor on the outline of the field. A required field message is displayed.

Figure 2.6 – Invalid Entry Error Message

Chapter 3 E-Filing Overview

Topics Covered in This Chapter

♦ Filing Queue Status

This section describes the e-filing process.

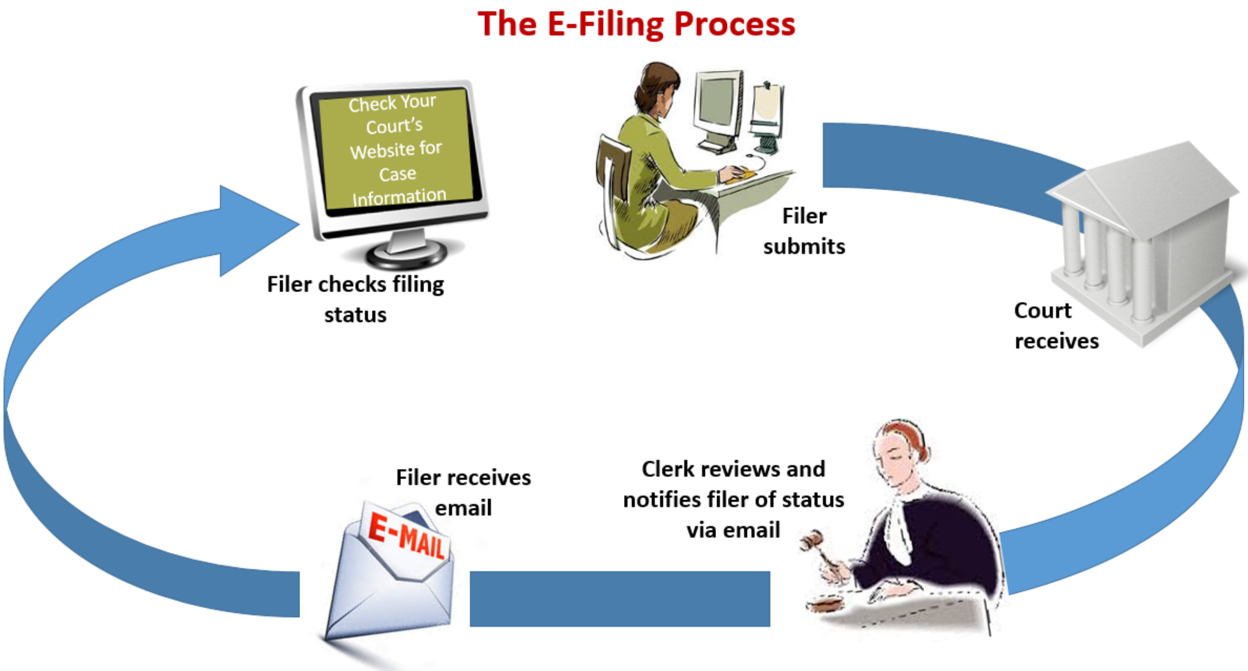


Figure 3.1 – The E-Filing Process

Once a user has registered to use 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 electronic mail 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 rejected or returned, the envelope is sent back to the filer with a reason and the filer is given a time line in which to make the correction and re-submit the filing.

If the filer has questions regarding their 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.

Status	Filing Type	Definition
Draft	EFO, EFS, SO	Filer entered full or partial filing data, but has not yet submitted filing.
Submitting	EFO, EFS, SO	Filer has submitted filing, but the document file format and payment information have not been verified on the back end.
Submitted	EFO, EFS, SO	Document file format and payment information have been verified and accepted, but the filing has not yet entered the Review Queue/Workflow Process. **Note: The system now prevents users from changing an envelope that has already been submitted.**
Court Processing	EFO, EFS, SO	Some additional action needs to be taken by the court.
Under Review	EFO, EFS	A clerk reviewer has selected filing from a queue. **Note: Once a filing reaches the Under Review status, it cannot return to the Submitted status. Selecting the End Review retains the Under Review status and returns the filing to the queue.**
Accepted	EFO, EFS	Reviewer has reviewed filing and accepted.
Rejected	EFO, EFS	Reviewer has reviewed filing and rejected.
Returned	EFO, EFS	Reviewer has reviewed filing and returned the filing as additional action needs to be taken by the filer. **Note: Filer can cancel or copy a filing in Returned status.**
Served	SO	Service only filings completed.
Service Incomplete (Service Only filings)	SO	One or more servings failed, the service was incomplete. Example: Email or domain rejected. **Note: The system will show the Resend Service button for failed electronic service.**

Status	Filing Type	Definition
Cancelled	EFO, EFS, SO	Filer has cancelled the filing. Filer can only cancel draft and submitted filings.
Submission Failed	EFO, EFS	File format or billing error has occurred upon filer submitted filing. Failure specifics are available on the Details screen, and the filer is notified of specifics through email.

Chapter 4 File & Serve Home Page

The home page serves as the gateway to the system. From this screen, you can register, log in, read your court's **Message of the Day**, access the user guides, view training sessions, and get contact information for Technical Support.

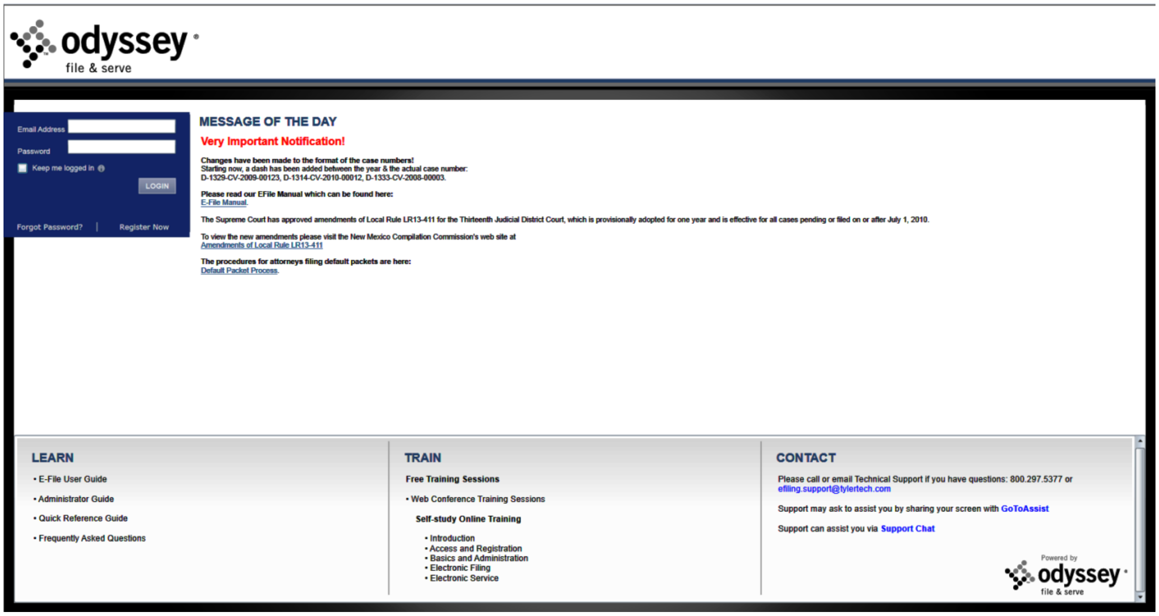


Figure 4.1 – File & Serve Home Page

Message of the Day

The **Message of the Day** provides important messages from the court. Check this section daily for important messages from the court.

Login

The **Login** area allows the user to log in and use the system. Users can log in to by entering their e-mail address and password.

Register Now

The *Register Now* link allows is a user to register in the system using their name, contact, and payment information. The system requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

Forgot Password

The *Forgot Password* link allows a user to request their password information be re-sent to them in cases where they have forgotten their password.

Keep Me Logged In

The *Keep me logged in* checkbox allows a user to remain logged into the system for future access.

Learn

The **Learn** section has links to the user documentation. The following types of documents available to help you answer many of your day-to-day operation questions:

- The **User Guide** provides step-by-step instructions on using the system. The user guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and password.
- The **Firm Administrator Guide** is specifically for the Firm Administrator. This guide covers administrative functions such as registering the firm, managing users, payments, attorney accounts, as well as, creating and editing the firm's contact lists.
- The **Quick Reference Guide** (QRG) provides only the steps needed to complete common tasks such as logging into the system, searching for a case, initiating a new case, filing into an existing case, and reviewing the filing status.
- The **Frequently Asked Questions** (FAQ) guide lists the most frequently asked questions from the users. The FAQ covers questions pertaining to functionality.

Train

Free regularly scheduled online training is available. You can register for training online and download user manuals.

- The **Web Conference Training Sessions** are scheduled according to the needs of the courts. Locate your specific court by scrolling through the list of training sessions for your court.
- **Self-study Online Training** is available by clicking on the link and choosing the topic of your choice.

Contact

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

Chapter 5 File & Serve Registration

Topics Covered in This Chapter

- ♦ Registering as a New Firm
- ♦ Registering as a User with an Existing Firm
- ♦ Registering as an Independent User
- ♦ Resetting your Password

Registering as a New Firm

File & Serve enables each firm to designate a person within the firm to administer the e-filing system. The administrator registers the firm and is responsible for setting up and maintaining all user, payment, and attorney accounts.

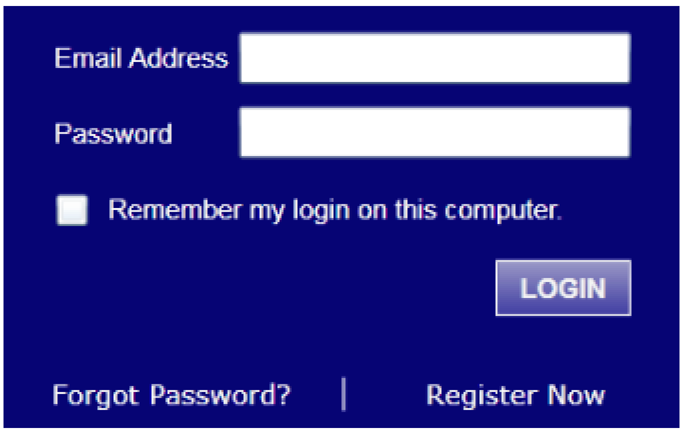


Figure 5.1 – File & Serve Login Area

Perform the following steps to register your firm as a new firm:

1. Click the Register Now link on the login screen.

   Note: There is no fee to sign up for File & Serve.

2. Select the Firm Administrator option.

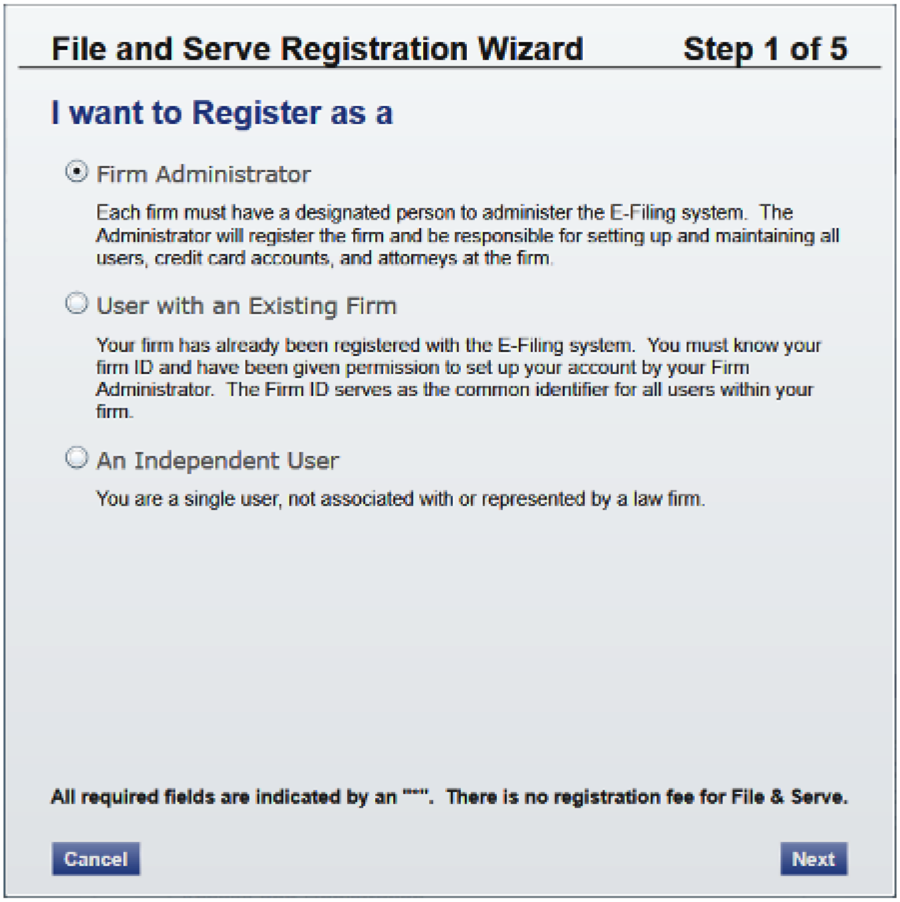


Figure 5.2 – File & Serve Registration Wizard (Step 1 of 5)

3. Click the **Next** button to continue, or click the **Cancel** button to cancel the registration process.
4. Read the terms and conditions for using File & Serve.

Figure 5.3 – File and Serve Registration Wizard (Step 2 of 5)

Note: You must agree to the terms and conditions before continuing with the registration process or you will receive the following error message.

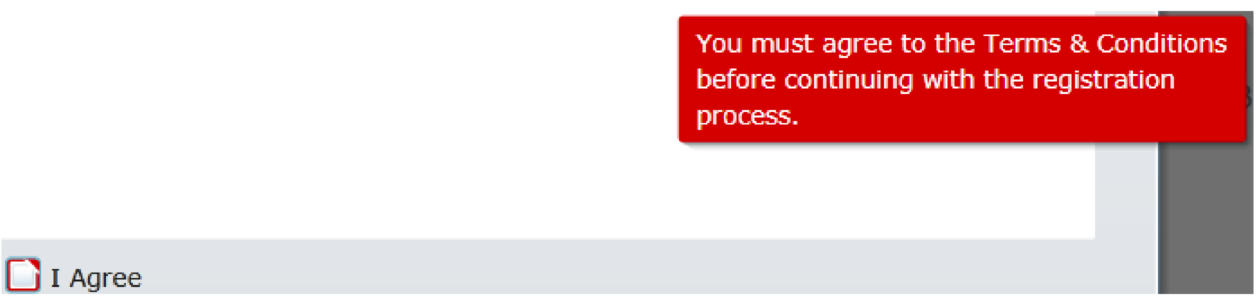


Figure 5.4 – Error Message — Agree to Terms & Conditions

5. Select the I Agree check box to accept the terms and conditions for using File & Serve.
6. Click the Next button to continue, or click the Cancel button to cancel the registration process.
7. Complete the **Firm Information** form.

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

Figure 5.5 – File and Serve Registration Wizard (Step 3 of 5)

8. Select the **Allow Users to Self Register for this Firm** check box to allow the firm user to register to use File & Serve without contacting a Firm Administrator.
9. Select the **Require Firm Administrator Approval of New User Registration** check box to have the option to approve every firm user that registers to use File & Serve.
10. Click the **Next** button to continue; click the **Previous** button to return to the previous screen; or click the **Cancel** button to cancel the registration process.
11. Complete the **User Information** form.

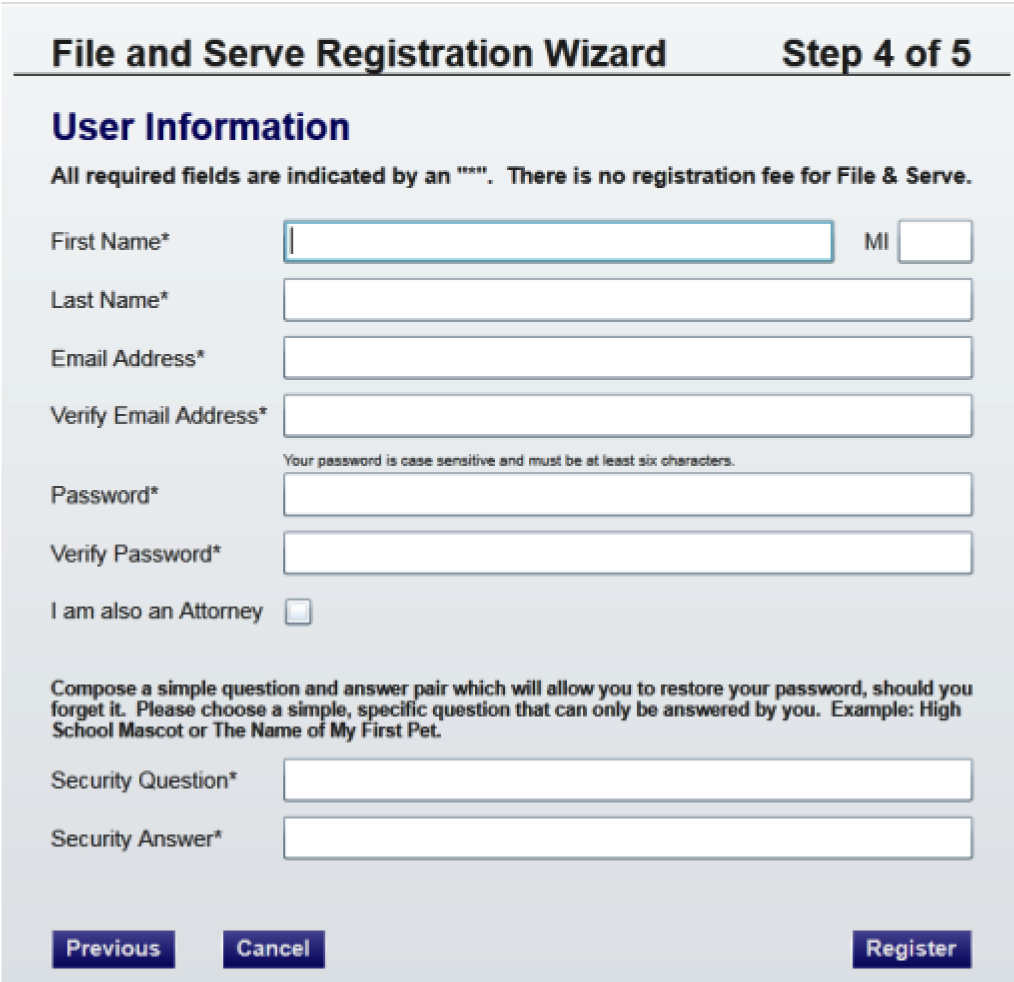


Figure 5.6 – File and Serve Registration Wizard (Step 4 of 5)

12. Enter a question in the **Security Question** field.

    File & Serve requests your security question to restore your password in case you forget your password.

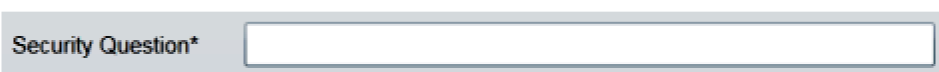


Figure 5.7 – Security Question Field

13. Enter a response in the **Security Answer** field.

Figure 5.8 – Security Answer Field

14. Click the Register button.

    File & Serve displays Your Registration is Complete. message on the screen.

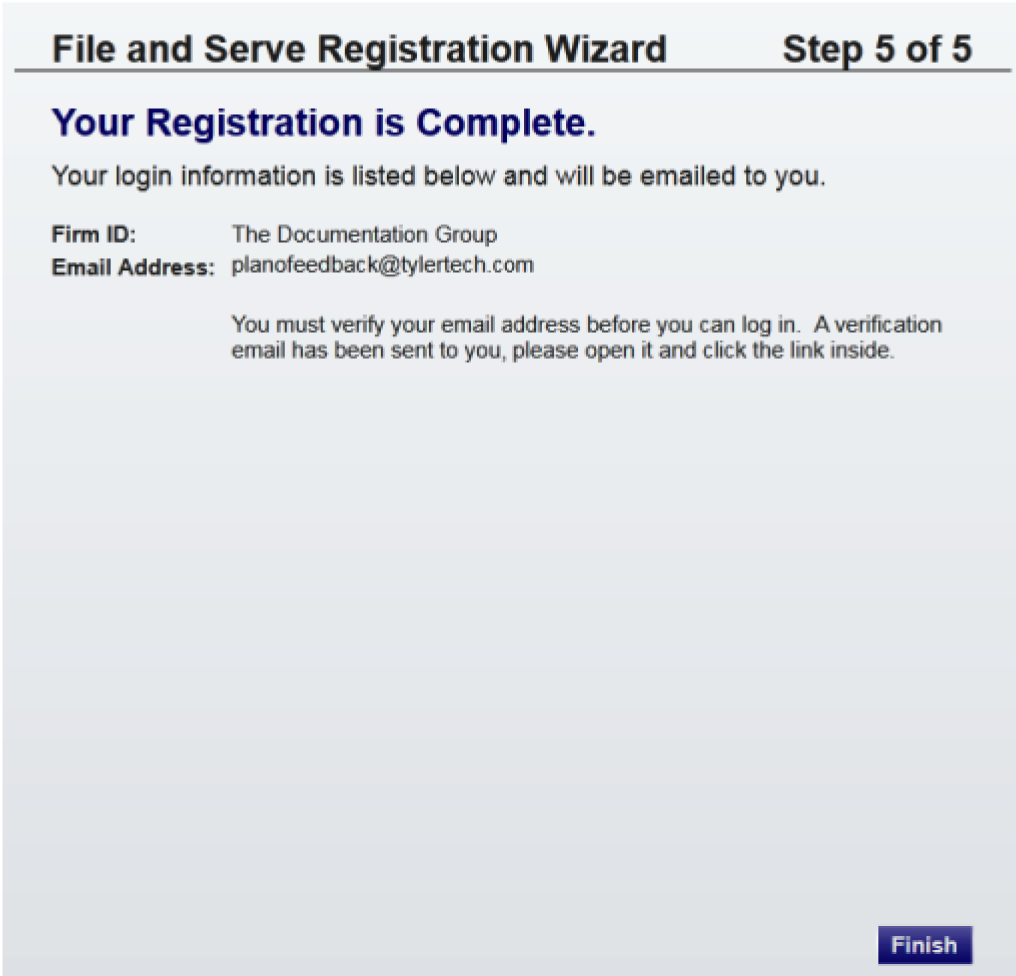


Figure 5.9 – File and Serve Registration Wizard (Step 5 of 5)

15. Click the **Finish** button to continue.

Note: You must verify your e-mail address to complete the registration process. A verification e-mail will be sent to you; open the e-mail, and click the link to confirm your e-mail address.

Your registration is now complete, go to your home page to log in to use File & Serve.

Registering as a User with an Existing Firm

You can register as a user if your Firm Administrator has already registered with the system and approved users to self-register.

Note: You must know your firm's name to set up your account. The Firm Administrator may not allow users to self register. If this is the case, the firm's name is not available when searching, and you must contact the Firm Administrator to be registered.

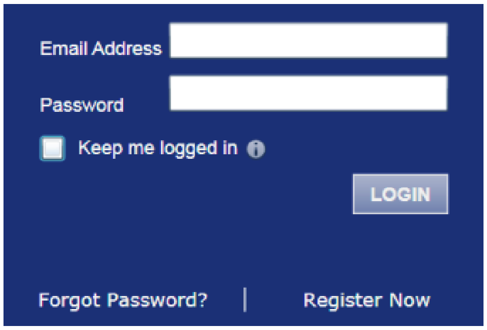


Figure 5.10 – Login Window

Perform the following steps to register as a user in the firm:

1. Click the Register Now link on the login screen.

   The **Registration Wizard** opens.
   Note: There is no fee to sign up for the product.

   Note: Registration options vary by site.

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

   Note: An asterisk (*) indicates required information.
7. Complete the **User Information** form.
8. Enter a simple **Security Question** in the field provided. (Example: `What was your high school mascot?`)

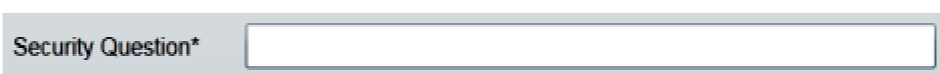


Figure 5.11 – Security Question Field

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

Figure 5.12 – Security Answer Field

Note: Select I am also an Attorney if you are an attorney, and then enter your attorney number in the field. Attorney number formats vary by site; refer to your court's website for information on how to enter your attorney number.

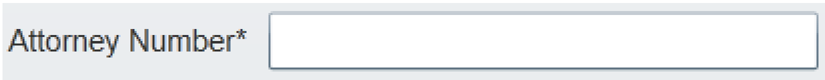


Figure 5.13 – Attorney Number Field

Note: Click the Verify button if prompted. This verifies your attorney number is in the system.

10. Click the Register button. The system displays the **Your Registration is Complete.** message on the screen.
11. Record the login details displayed for your records.
12. Click the Finish button.
13. Go to your e-mail inbox to access your registration confirmation e-mail.

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

Your registration is now complete. Once you have received your e-mail confirmation, return to the login screen to log in.

Registering as an Independent User

You can register as an "independent user" if you are a single user of the system, meaning a user not associated with any firm or being represented by any firm.

Note: Refer to your local court's website before registering as an independent user, as registration options may vary.

Perform the following steps to register as an independent user:

1. Click the Register Now link.

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

2. Select the An Independent User option.
3. Click the Next button to continue; click the Previous button to go back; or click the Cancel button to cancel the registration process.
4. Read the **Usage Agreement** before proceeding.
5. Select the I Agree check box to accept and agree to the terms listed on your screen.
6. Click the Next button to continue; click the Previous button to go back; or click the Cancel button to cancel the registration process.
7. Complete the **Contact Information** form.
8. Click the Next button to continue; click the Previous button to go back; or click the Cancel button to cancel the registration process.
9. Complete the **User Information** form.
10. Enter a question in the **Security Question** field.

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

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

12. Click the Register button.

    The message **Your Registration is Complete** displays on the screen.

13. Click the Finish button.

    Note: You must verify your e-mail address to complete the registration process. A verification e-mail (from no-reply@tylerhost.net) will be sent to you; open the e-mail and click the link to confirm your e-mail address. If you don't see the e-mail in your inbox, check your junk mail folder for the e-mail.

    Your registration is complete, go to your home page to log in.

RESETTING YOUR PASSWORD

If you have forgotten your password, you can reset your password by entering the e-mail address provided during registration and clicking the Forgot Password? link.

Note: Your password is case-sensitive. Make sure your caps lock is not on.

Note: You can unlock your account by using the Forgot Password? option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.

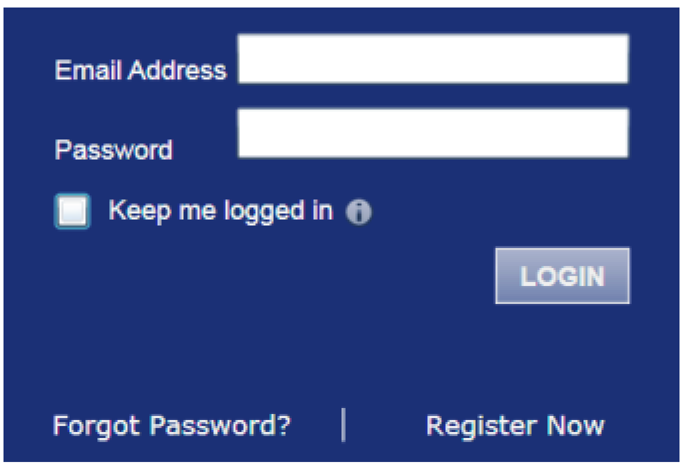


Figure 5.14 – Login Window

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

   The **Reset Password** window opens.

Figure 5.15 – Reset Password – E-mail Address

2. Type the e-mail address you provided during the registration process in the **E-mail Address** field.

   Note: An error message stating that no user is registered with the email address is displayed if the system is unable to find your email address.

3. Click the **Next** button to continue.
4. Type your answer in the **Security Answer** field.
5. Click the **Ok** button, or click the **Cancel** button to cancel the reset password process.

   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.**

6. Go to your email inbox.
7. Locate the email from no-reply@tylerhost.net.
8. Click the link labeled **Click here** to reset your password.

   You will be prompted to choose a new password.

9. Enter a new password in the *New Password* field.
10. Re-enter your new password in the *Repeat New Password* field.
11. Click the *Change Password* button.

    A confirmation screen displays: **Your password has been changed successfully.**

Chapter 6 Login and Logout

Topics Covered in This Chapter

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

Logging In

You can log in by using your e-mail address and password provided during the registration process. You must log in to be able to e-file or e-serve.

Note: Click Register Now to register if you have not registered before.

Perform the following steps to log in:

1. Go to your home page.
2. Enter your e-mail address and password (case-sensitive) in the fields provided.

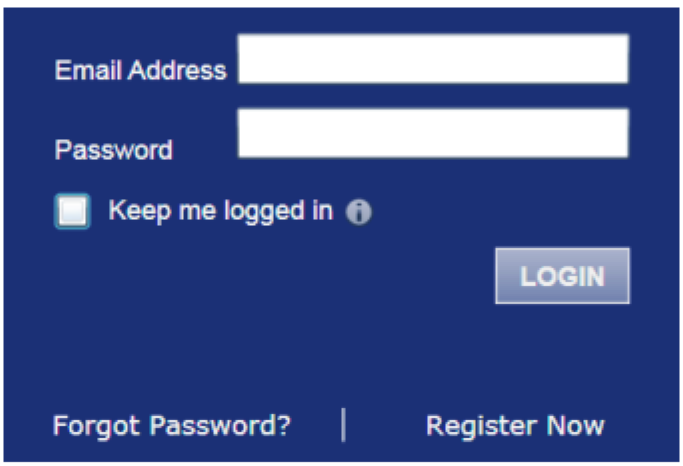


Figure 6.1 – Login Area

3. Select the Keep me logged in check box to stay logged in. This keeps you logged in until you click the logout link to logout.
4. Click the LOGIN button.

   Note: After several failed attempts to log in to the system, your account is locked. You can unlock your account by using the Forgot Password? option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.

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

Logging Out

This section describes how to properly log out.

Perform the following steps to log out:

1. Click the LOGOUT link at the top right corner of the page to automatically log out.

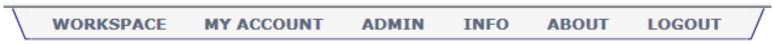


Figure 6.2 – Logout Link

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

Chapter 7 Workspace

The **Workspace** page displays the links to access the **Filings**, **Bookmarks**, **Templates**, and **Service Contacts** pages.

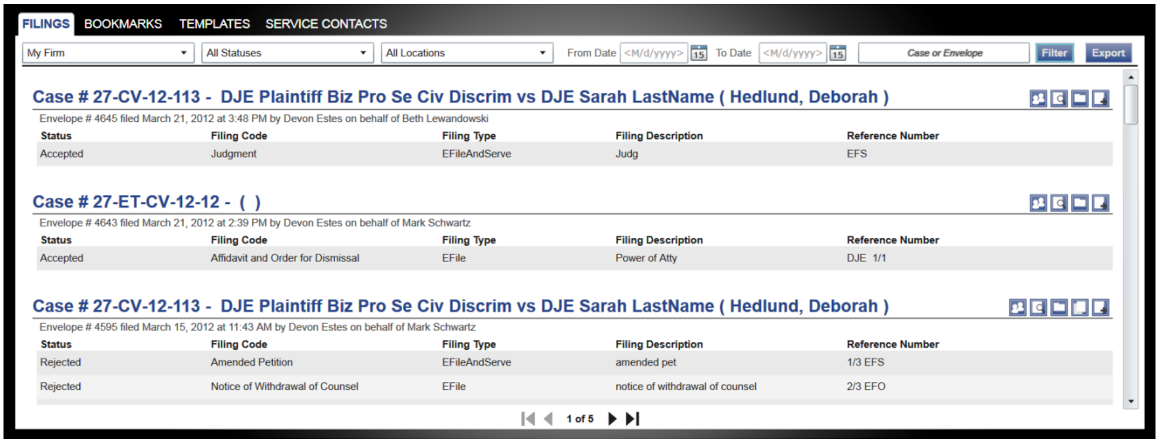


Figure 7.1 – The Workspace

Workspace

You can access the **Workspace** after you have successfully logged in. Click the WORKSPACE link at the top-right corner of the page. This will take you to the **Workspace** page.

The **Workspace** pages are used to view recent filings, manage templates, file into existing cases, manage case service contacts, bookmark cases, view the details of the case, copy the envelope to use in another filing, or cancel a filing (prior to court approval).

From the **Workspace** screen, you can perform the following tasks.

New Case

Use the **New Case** link located at the top of your screen for filing a new case, page 31.

Case Search

You can search for a case by selecting a location using the drop-down menu and entering a case number in the **Case Number** field, then click the Go button. You can also search for a case by using the *Advanced Search* option.

Figure 7.2 – Case Search Options

Filings

From the **Filings** screen, you can perform the following tasks:

- View the status of your filing
- Check the filing type
- Get a document description
- See the number assigned to your case

- View case details
- Filter the Filing Queue, page 60
- Add service contacts to a case, page 70
- Viewing the Envelope Details, page 50
- Copy the envelope, page 63
- Resume the filing process, page 68

Bookmarks

The **Bookmarks** screen displays a list of case numbers and descriptions for the cases you have bookmarked. Only you and your firm (depending on the firm setup) may see this information. Neither the public nor any other firm will be able to see your case list.

From the **Bookmarks** screen, you can perform the following tasks:

- View a list of bookmarked cases
- Refresh the cases list
- Filter the cases list
- File into an existing case, page
- Remove a case from the bookmark list
- Add service contacts to the bookmarked case

Service Contacts

From the **Service Contacts** screen, you can perform the following tasks:

- Add service contacts to a case, page 70
- View service contact details, page 77
- View the attached cases list, page 82
- Replace service contacts on the case, page 83
- Deactivate a service contact, page 84

Chapter 8 Templates

Topics Covered in This Chapter

♦ Creating a Template
♦ Editing a Template
♦ Deleting a Template

Filers can establish and manage filing templates that simplify the filings for common parties, events, and documents when filing a new case.

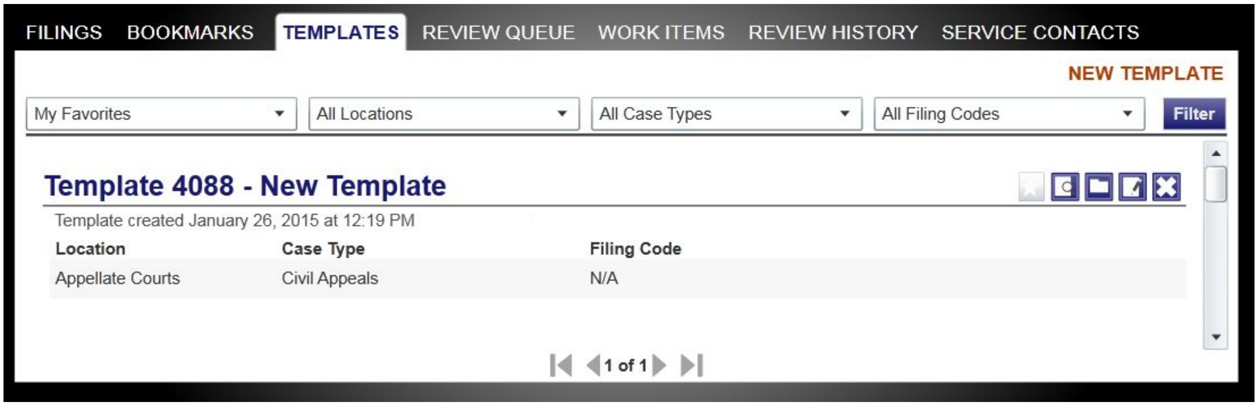


Figure 8.1 – Templates Screen

Using the **Templates** screen, filers are able to create, manage, and use a filing template recently created.

When creating a new filing using a template, the information can be modified as needed for the particular filing. The modification will not affect the original template. Templates created by an individual filer are accessible by all users within the firm.

From the **Templates** screen, you can perform the following tasks:

- Save commonly used templates to the **My Favorites** folder for easier access to the template. **Note: When searching for a saved template, the *Template Name* field is the only required field.**
- To view the templates saved in **My Favorites**, select **My Favorites** from the drop-down list, and then click the Filter button.
- To view the templates saved by your firm, select **My Firm** from the drop-down list, and then click the Filter button.
- To select a location, use the drop-down list to filter by location, and then click the Filter button.
- To select a case type, use the drop-down list to filter by case types, and then click the Filter button.
- To select a filing code, use the drop-down list to filter by filing codes, and then click the Filter button.

- Click the icon to add the template to your favorites.
- Click the icon to view the template details.
- Click the icon to file using an existing template.
- Click the icon to edit the template.
- Click the icon to delete the template.

Creating a Template

Filers can create templates that simplify the filings for common parties, events, and documents when filing a new case.

Perform the following steps to create a template:

1. Click the WORKSPACE link at the top of the screen.

   Note: This opens the Filings screen.

2. Click the **Templates** tab.

   Note: This opens the Templates screen.

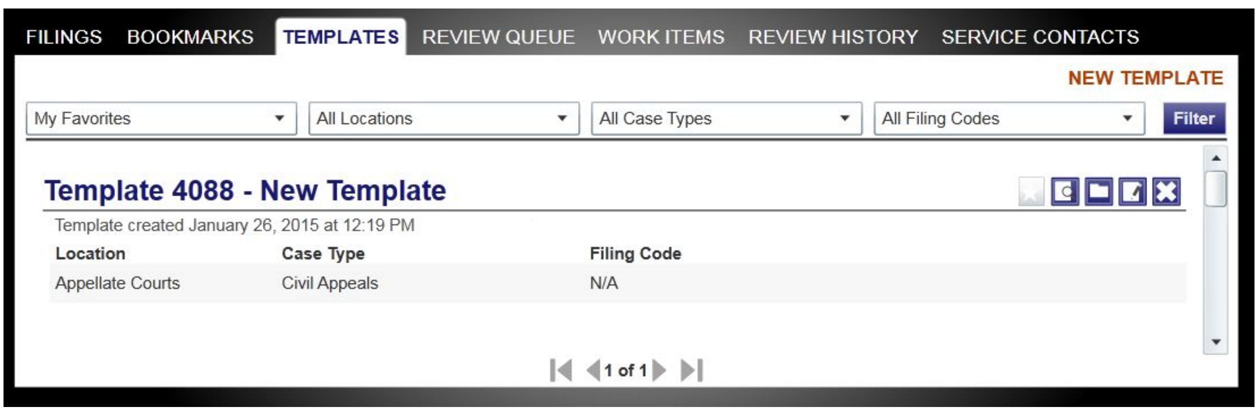


Figure 8.2 – Templates Tab and Screen

3. Click the NEW TEMPLATE link.

   The **Case Information** page opens.

4. Complete the **Case Information** page.

   Note: An asterisk indicates required fields.

   Select the **Add as Favorite** check box to save the template to your favorites.

   Note: You must select a location using the *Select Location* drop-down list to ensure you are able to select a case category, case type, payment account, party type, and filing code for the case.

5. Click the Parties button to save the case information and continue.

6. Enter the details for the parties involved in the case.
7. Click the **ADD PARTY** button to add a new party to the case.

   Complete the **Add Party** form.

   Repeat this step to add another party to the case.
8. Click the **Filings** button to save and continue.
9. Enter the filing details for the case.
10. Click the **Service** button to save and continue.
11. Select the contacts to receive service for this envelope.
12. Click the **Summary** button to save and view a summary of the case.
13. Click the **Complete Template** button to submit the filing.

EDITING A TEMPLATE

Users can edit templates created for the firm.

Perform the following steps to edit a template:

1. Select the **Templates** tab.

   Note: This opens the Templates screen.

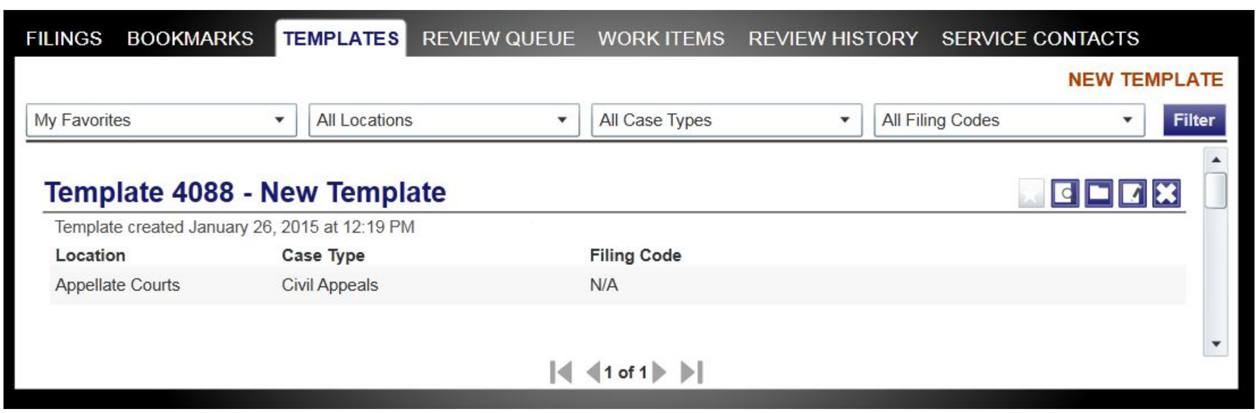


Figure 8.3 – Templates Tab and Screen

2. Select the template you want to edit from the list.
3. Click the Edit Template icon.
4. Edit the pages of the template as needed.
5. Click the **Complete Template** button to save the template.

Deleting a Template

Users can delete templates created for the firm.

Perform the following steps to delete a template:

1. Select the **Templates** tab.

   Note: This opens the Templates screen.

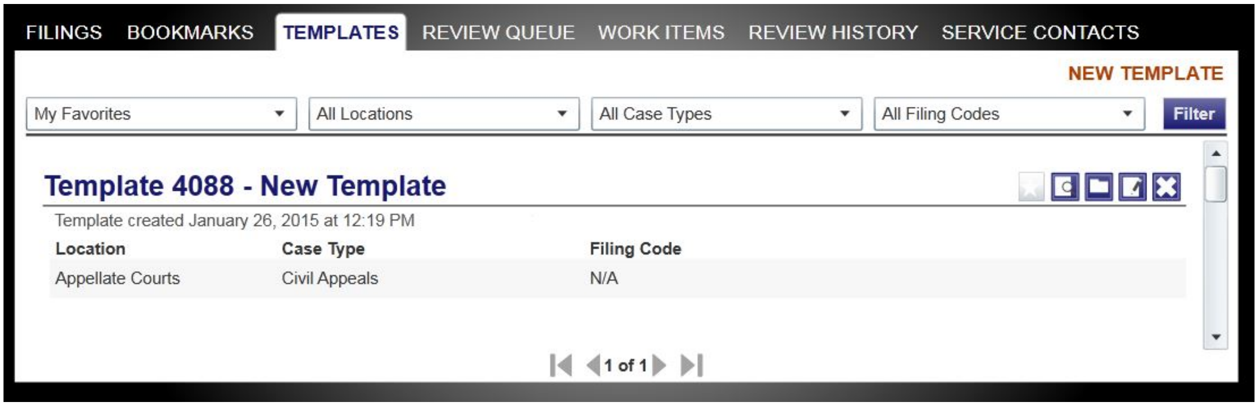


Figure 8.4 – Templates Tab and Screen

2. Select the template you want to delete from the list.
3. Click the Delete Template  icon.

   This deletes the template and removes the template from the list.

Chapter 9 Case Initiation

Topics Covered in This Chapter

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

Figure 9.1 – New Case Link

Click the **New Case** link at the top of the page to open the **Case Information** page and to begin the case initiation process for e-filing.

Note: A payment account must exist before you can submit a filing.

Filing a New Case

File a new case using the **Case Information** screen.

A payment account and a filing attorney must be set up prior to filing a new case. Contact your Firm Administrator to set up the accounts prior to starting the filing process.

Perform the following steps to file a new case:

1. Click the NEW CASE link.

Figure 9.2 – New Case Link

The **Case Information** page opens.

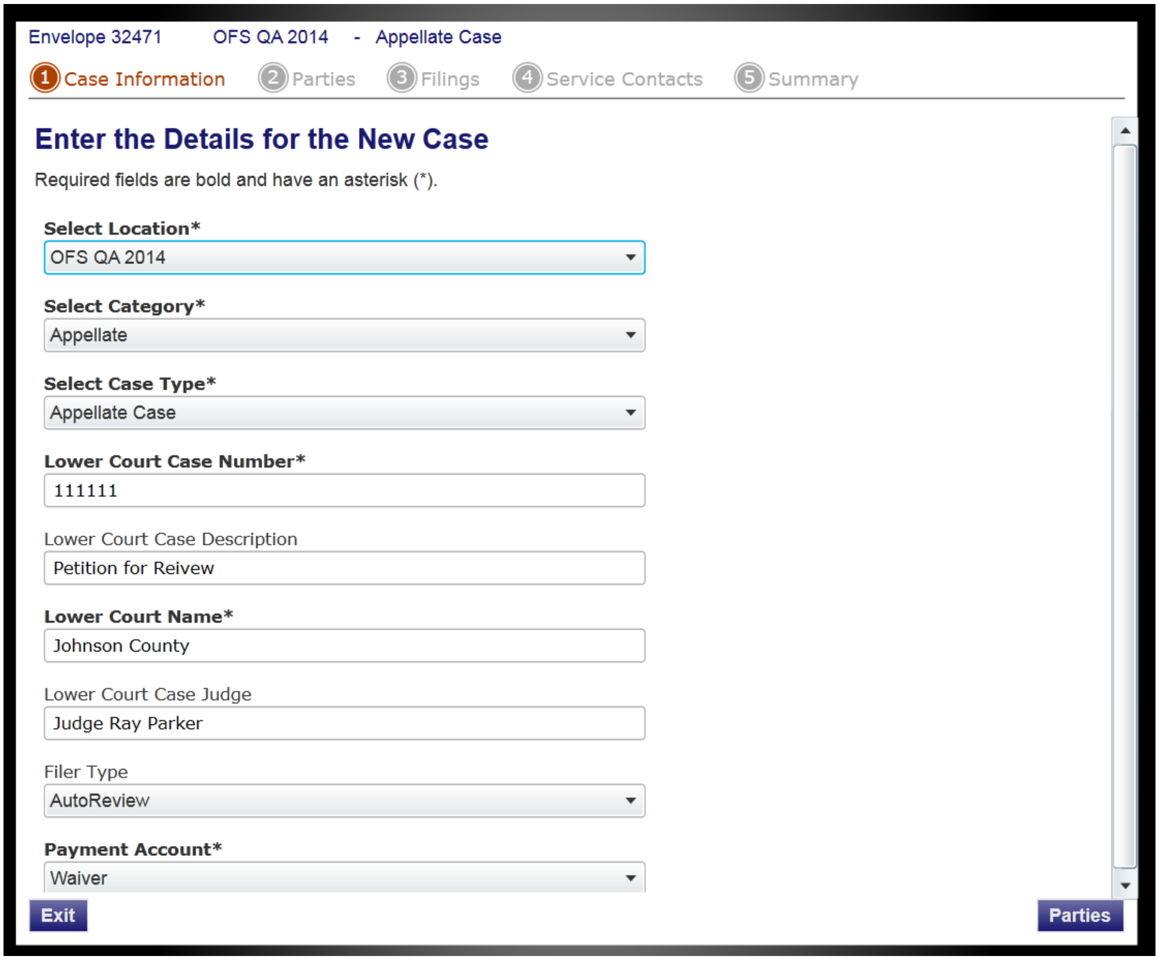


Figure 9.3 – Case Information Page

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

   Note: An asterisk indicates required fields.

   To file an appeal on a case, select the **Appellate** case category from the **Select Category** drop-down list.

   Note: A lower court case number and court name is required to file an appeal.

3. Click the **Parties** button to save the case information and continue.

Note: Once you click the Parties button, a draft of the pages where all of the required fields have been completed is automatically saved. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing a saved draft, click the WORKSPACE link at the top of the page, find your case on the Filings screen, and click the icon.

Entering Party Details

Each case requires a party type.

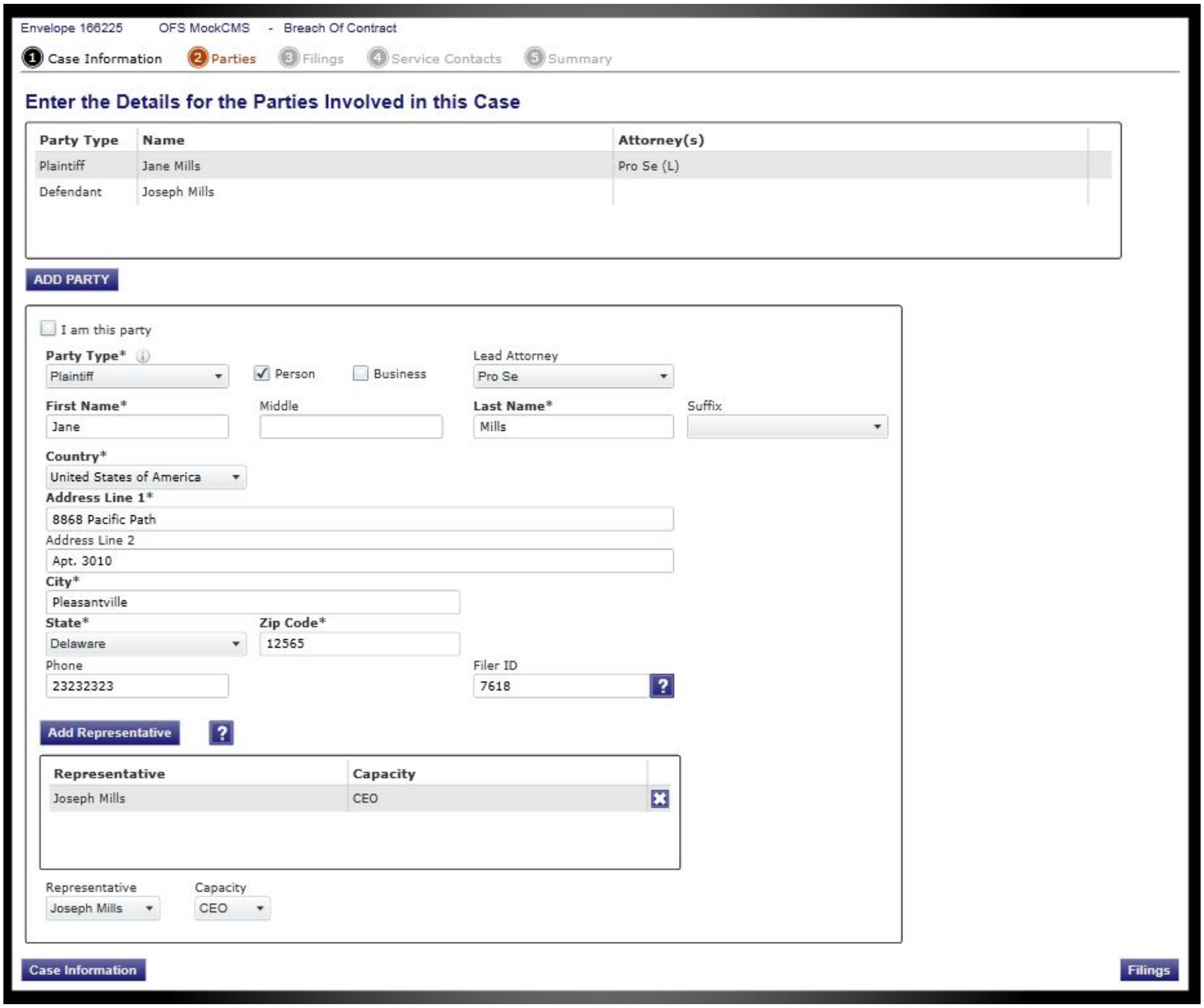


Figure 9.4 – Parties Page

Perform the following steps to enter the details for the parties involved in the case:

1. Click the **Parties** button from the **Case Information** page to enter the party details for the case.
2. Choose the party type by selecting either **Plaintiff** or **Defendant** under the **Party Type** column. You can also select the party type using the drop-down list in the **Party Type** field.
3. Enter the party information in the fields provided.

   Note: An asterisk (*) indicates a required field.
   You must complete all required information for the party types in the fields provided.

   a. Click ☐ I am this party to indicate you are the party.

b. Select additional attorneys for the filing using the drop-down list under the *Add Additional Attorneys* section.

The (L) beside the attorney's name indicates a lead attorney, and the (+1 more) indicates the number of additional attorneys not shown. **Note: If a case already exists in the case management system, the option to remove the assigned lead attorney is disabled.**

Figure 9.5 – Add Additional Attorneys

c. **Close** to close the window.

4. Select the country using the **Country** drop-down list.

Note: Foreign address fields are now added to the current data requirements of the address block in system to allow for non-U.S. addresses.

The system will no longer allow selection of Mail Service for service contacts with non-US addresses.

Figure 9.6 – Service Method

- The following will apply when the country listed is Canada:
  - The **State** field will display as **Province**.
  - If **Provinces** are configured, then the **Province** field will consist of a drop-down list of Canadian codes; otherwise, the **Province** field will consist of a free-form text box.
  - The **City** field will display as **Municipality**.
  - The **Zip Code** field will display as **Postal Code**.
- The following will apply when other foreign countries are selected:
  - The **State** field will display as **Region**.
  - If **Regions** are configured, then the **Region** field will consist of a drop-down list with these codes; otherwise, the **Region** field will consist of a free-form text box.
  - The **City** field will display as **Municipality**.
  - The **Zip Code** field will display as **Postal Code**.

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

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

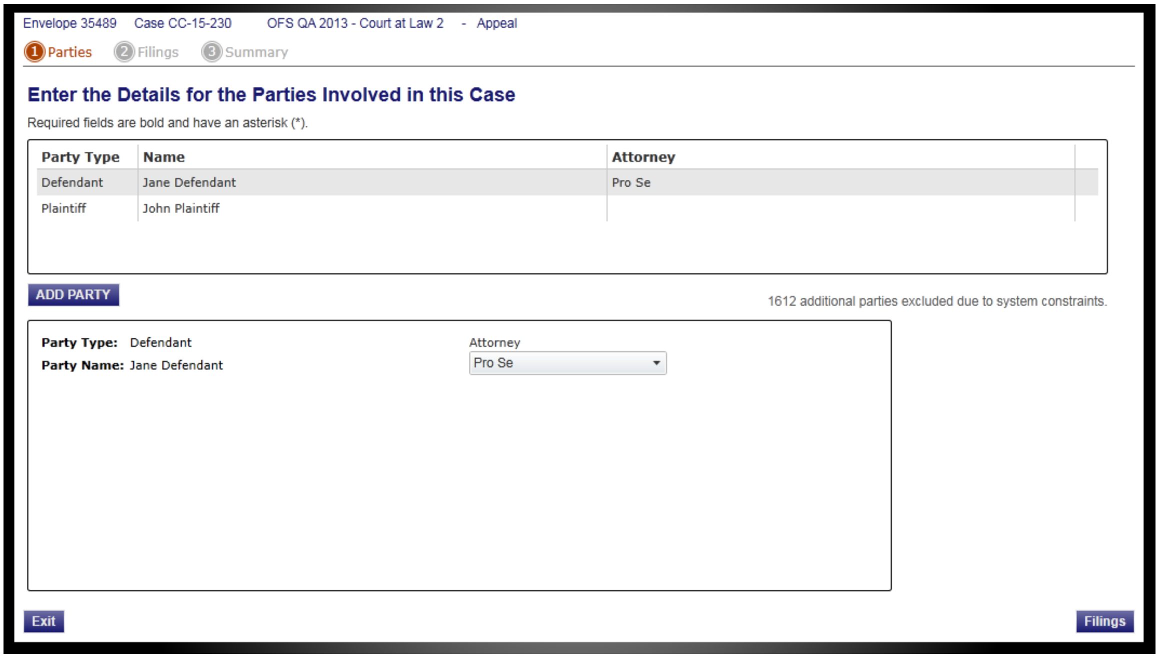


Figure 9.7 – Parties Page

5. Click the **Filings** button to save the party details, or click the **Case Information** button to return to the previous screen.

ENTERING FILING DETAILS

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

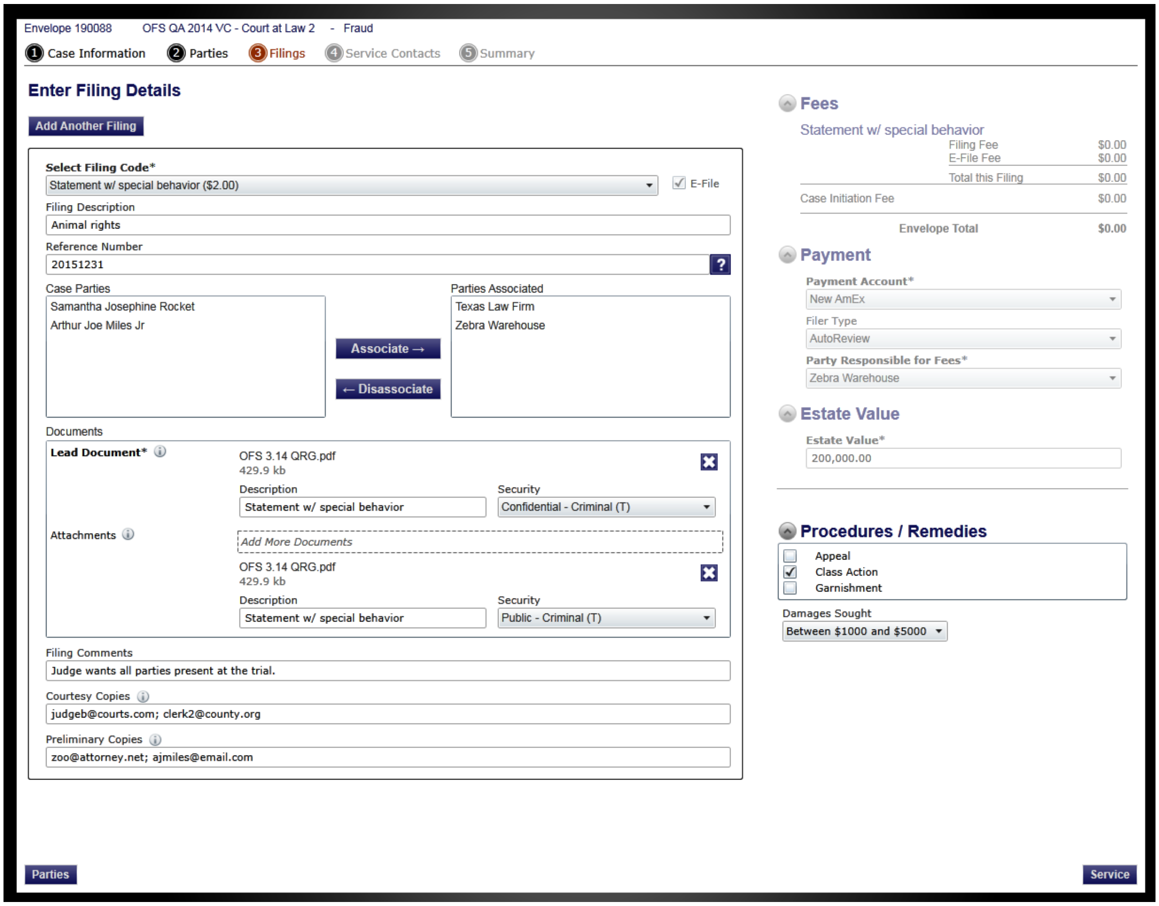


Figure 9.8 – Filing Details Screen

Perform the following steps to enter the filing details for the case:

1. Click the  button from the **Parties** screen to enter the filing details.
2. Select the filing code using the **Select Filing Code** drop-down list.
3. Select the **E-File** check box to electronically file the case.
4. Select the **Service** check box to electronically serve the case.
5. Enter a brief description of the filing associated with the filing code previously selected in the **Filing Description** field.
6. Type the reference number of your choice that you can refer back to for this filing in the **Reference Number** field.

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

7. Select the parties to associate or disassociate with the case.

8. Select the lead document for this filing.

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

      This opens Windows Explorer on your computer.

   b. Select a document to upload from the files on your computer.

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

   c. Click Open to attach the file.

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

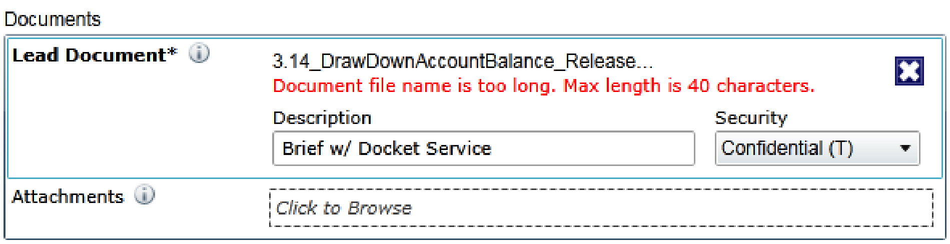


Figure 9.9 – Document File Name Error

   d. Wait as the attachment uploads.

      Note: Select the icon to delete the uploaded attachment.

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

   f. Select a security option for the attachment.

9. Select the attachments to upload for this filing.

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

      This opens Windows Explorer on your computer.

   b. Select the attachments to upload from the files on your computer.

      Note: Multiple documents can be uploaded as attachments simultaneously.

      The system provides a way to upload a file type that is not converted into PDF format. Users can download and view the files externally using the RTF document format.

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

      Note: The system now allow uploads from Mac computers.

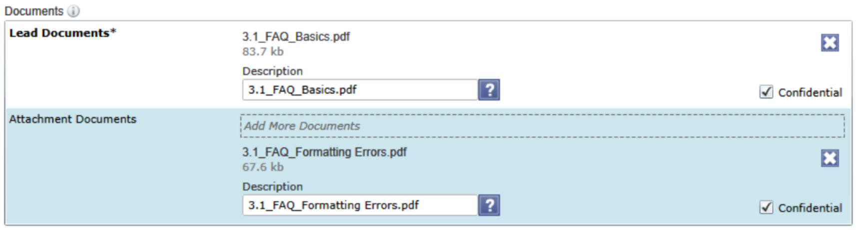


Figure 9.10 – Uploading an Attachment

c. Click  to attach the file.

d. Wait as the attachment uploads.

Select the  icon to delete the uploaded attachment.

e. Type a description of the uploaded attachment.

f. Select a security option for the attachment.

10. Enter the filing comments for the court reviewer to read in the **Filing Comments** field.
11. Type the email addresses of the parties to receive courtesy copies of this filing in the **Courtesy Copies** field.
12. Type the email addresses of the parties to receive preliminary copies of this filing in the **Preliminary Copies** field.
13. Select a due date using the  icon.
14. Review the filing fees located on the right side of the screen.

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

15. Select a payment account to pay the filing fees.
16. Select a filer type for the payment account used to pay the filing fees.
17. Select the party responsible for the filing fees.
18. Select a filing attorney.
19. Enter the value of the estate in the **Estate Value** field.

Figure 9.11 – Estate Value Field

20. Select the **Procedures/Remedies** check boxes for this filing.

Figure 9.12 – Procedures/Remedies Section

21. Select the damages sought **Damages Sought** for this filing.

Note: To add another filing to the case, click the Add Another Filing button, and enter the filing details in the required fields.

22. Click the Service button to save the filing details when you are done, or click the Parties button to return to the previous screen.

Calculating Multiple Fees

The system requires the user to enter a fee multiplier value for optional services and confirms the value entered before submitting a filing.

Figure 9.13 – Fee Calculation Table

Perform the following steps to calculate multiple fees:

1. Select a filing code with a listed optional service using the drop-down list.
2. Enter a number of services or copies needed.

3. Click the *OK* button to calculate the multiple fees and return to the *Filings* screen.

Selecting Contacts to Receive Service

The **Service Contact** screen allows you to select the contacts you want to receive service for the case.

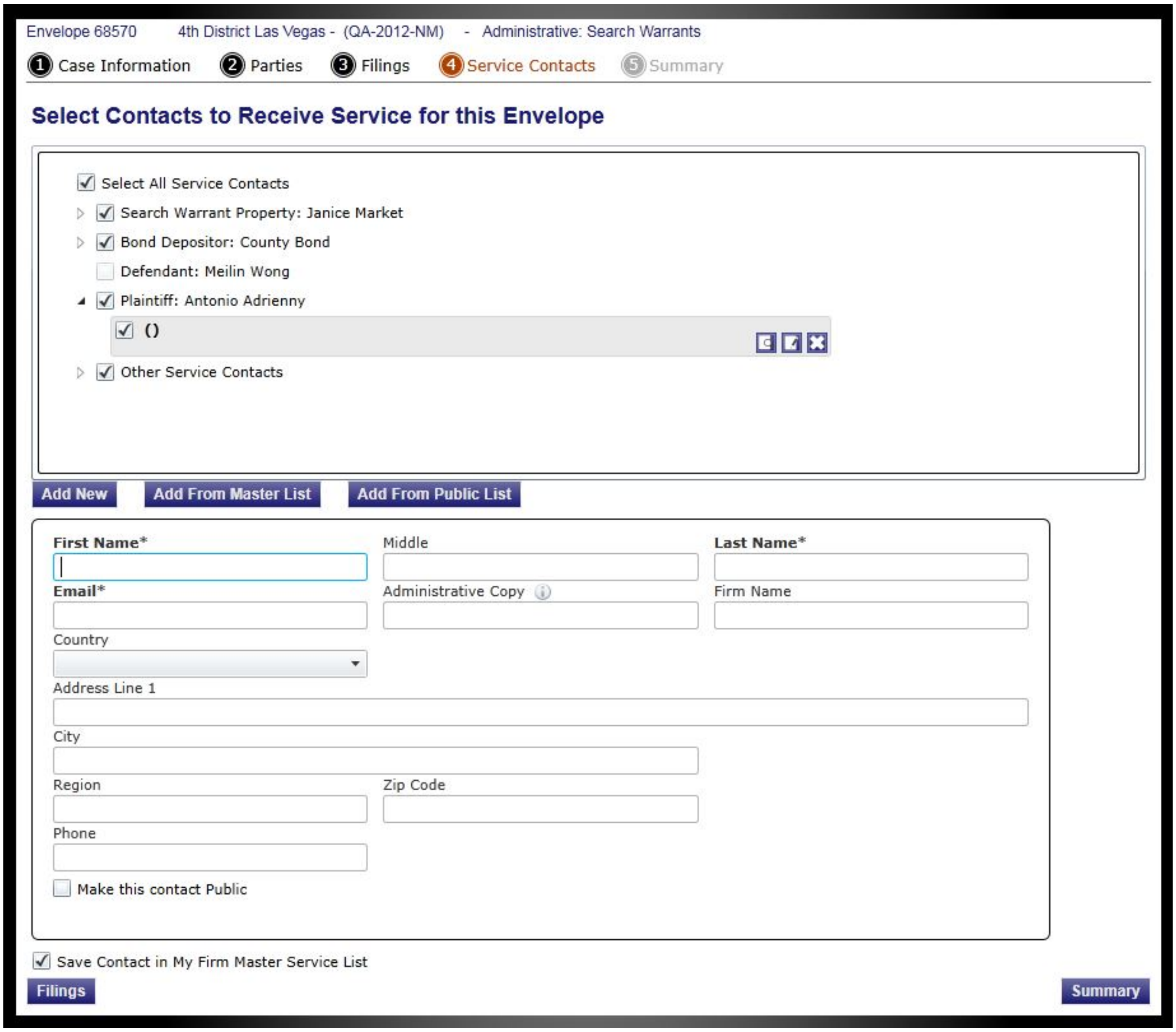


Figure 9.14 – Service Contacts Screen

Perform the following steps to select the service contacts to receive service:

1. Click the **Service** button from the **Filings** screen to select the service contacts.

2. Select the check box next to the name of the service contact to add to the case, or click the **Add New** button in the middle of the window to add a new service contact.

   Note: If there is no email address next to the name of the service contact, the contact cannot be served. You will need to add an email address or add a new service contact to the case.

   The fields required to add a service contact is displayed.

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

   Note: An asterisk (*) indicates required information.

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

   The administrative email is an optional additional email for the delivery of service. Delivery to this address is not considered a determining factor for the completion of e-service.

5. Select the **Make this contact Public** check box to make the contact public.
6. Select the **Save Contact in My Firm Master Service List** check box to save the contact to the firm's master service list.
7. Click the Save button to save the contact.
8. Select the check boxes next to the service contact names you want to receive service.

   To add service contacts from a master list or a public list, do the following:

   - To add service contacts from the master list, go to Adding Service Contacts from Master List, page 72.
   - To add service contacts from the public list, go to Adding Service Contacts from Public List, page 74.

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

VIEWING THE CASE SUMMARY

The **Summary** page displays the case information, parties involved in the case, filing details, fees, payments, and filing attorney for the case.

The **Parties** and **Filings** pages must be complete before you can view the case summary. A payment account must be assigned to the case to complete the filing process.

Perform the following steps to view the case summary:

1. Click the Summary button from the **Filings** screen to view the case summary.

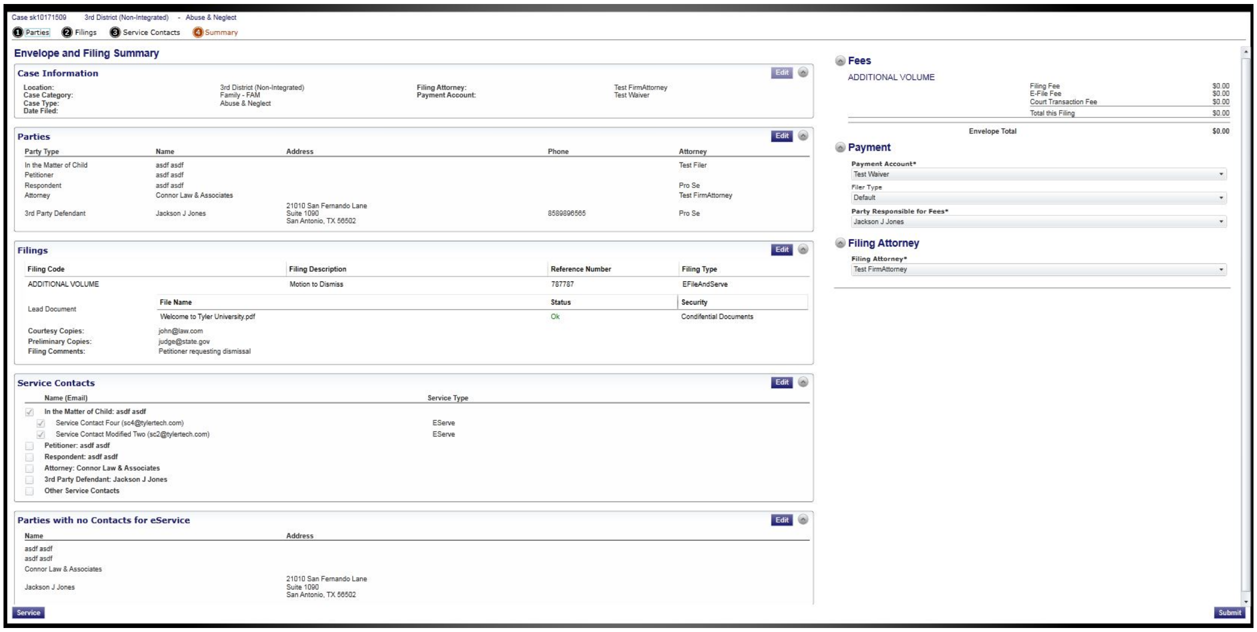


Figure 9.15 – Envelope and Filing Summary Page

The **Envelope and Filings Summary** window opens. Here, you can view the **Case Information**, the **Parties** involved in the case, the **Service Contacts**, the **Filing** codes, the filing **Fees**, the **Payment** accounts, and the **Filing Attorney** for the case.

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

2. Click the 

button to submit your filing, or click the 

button to take you back to the **Filings** screen.

Chapter 10 Case Search

Topics Covered in This Chapter

Search for a case by selecting a location, entering a case number or a party name.

Searching for a Case

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

Figure 10.1 – Case Search Option

Perform the following steps to search for a case:

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

   No wildcards can be used in the search field.

3. Click the Go button.

   The result screen displays the case meeting the criteria entered in the search field.

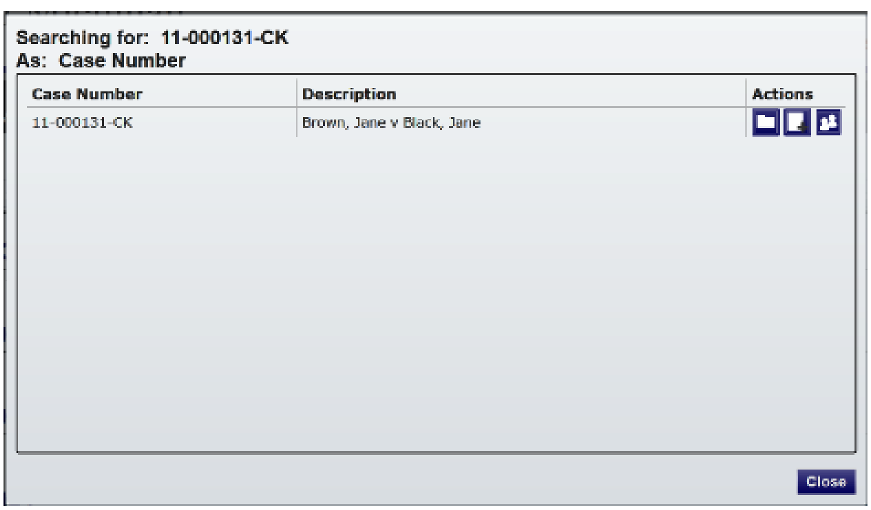


Figure 10.2 – Case Search Results

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

Advanced Search

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

Performing an Advanced Search by Person

Search for a case by selecting a location, entering a case number or a party name. The **Advanced Search** feature provides the ability to search by party name using a person's name. The **Advanced Search** feature includes the ability to filter a search by party name based on the location or the case type.

An asterisk (*) indicates a required field. **Note: Color themes may vary by site.**

Complete the following steps to perform an **Advanced Search** using the **Person** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

   The *Advanced Search* dialog box opens.

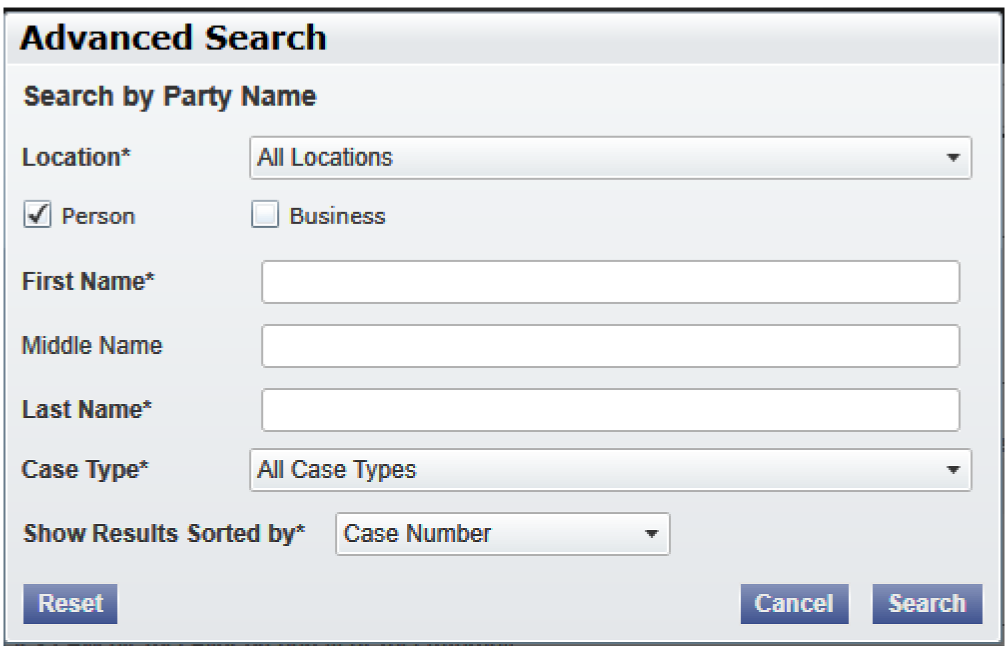


Figure 10.3 – Advanced Search Dialog Box

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

   Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.
3. Complete the fields in the *Advanced Search* dialog box.
4. Click the **Search** button to continue or the **Cancel** button to cancel. Click the **Reset** button to reset the form.

The search results are displayed.

Performing an Advanced Search by Business

The Advanced Search feature provides the ability to search by party name using a business name.

An asterisk (*) indicates a required field. **Note: Color themes may vary by site.**

Complete the following steps to perform an *Advanced Search* using the **Business** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

   The *Advanced Search* dialog box opens.

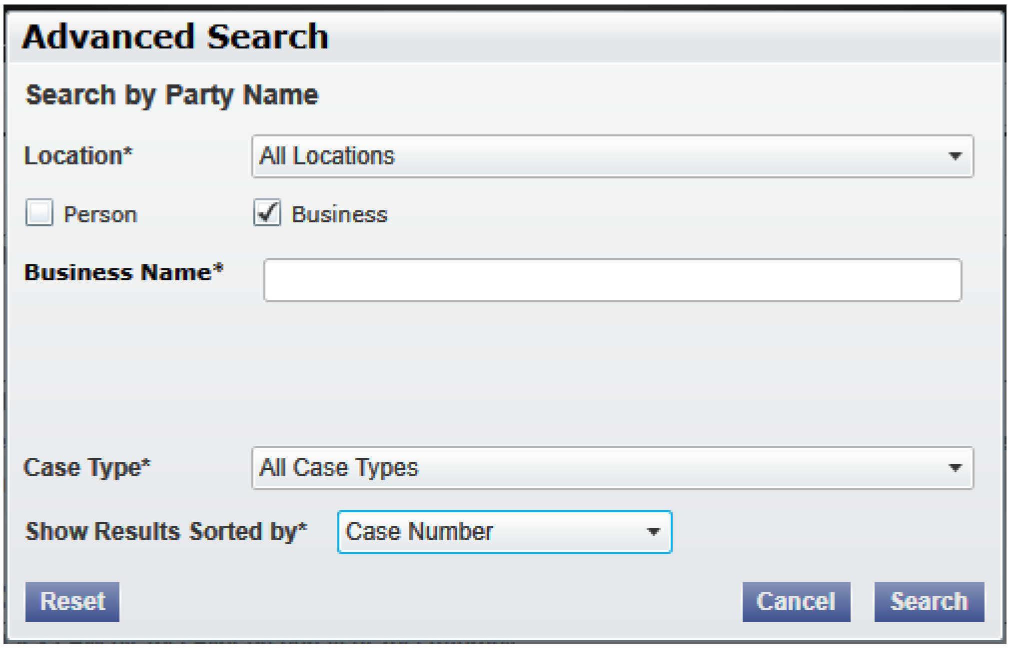


Figure 10.4 – Advanced Search Dialog Box

2. Select the **Business** check box.

   Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.
3. Complete the fields in the *Advanced Search* dialog box.
4. Click the **Search** button to continue, or the **Cancel** button to cancel. Click the **Reset** button to reset the form.

The search results are displayed.

Chapter 11 Subsequent Filing

Topics Covered in This Chapter

♦ Filing into an Existing Case

Once a new case has been created by the courts, you can file into the existing case. Filing into an existing case is also called subsequent filing.

Filing into an Existing Case

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

Perform the following steps to access your case to begin a subsequent filing.

Note: The system no longer allows subsequent filing into cases that have not been accepted by the court.

1. Click the WORKSPACE link at the top of the page.

   Note: This will take you to the Filings screen.

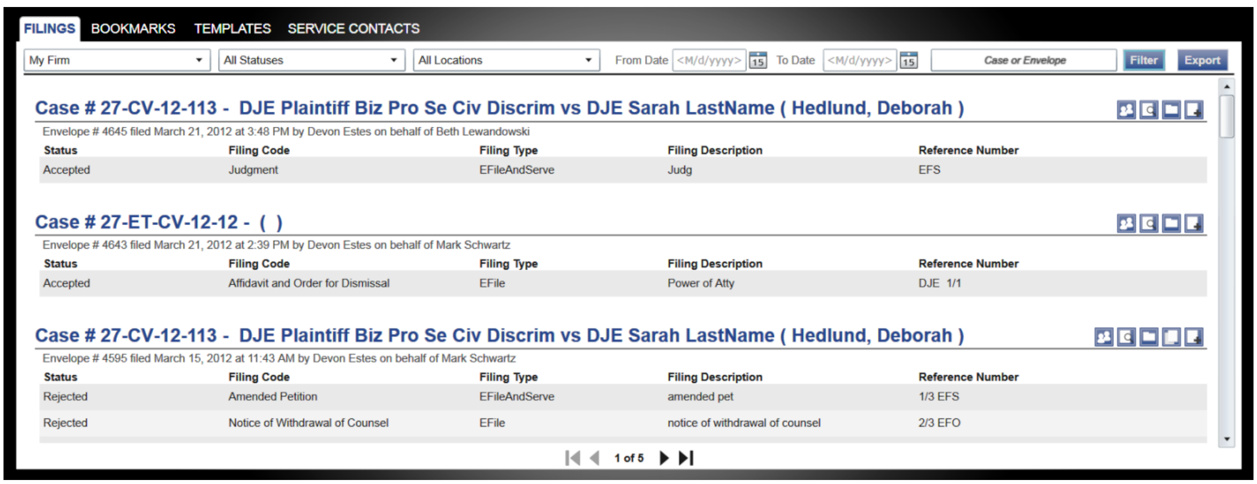


Figure 11.1 – Filing Screen

   a. Locate your case on the **Filings** screen.

      The system now prevents users from changing an envelope that has already been submitted. The **Cannot Resume Envelope** pop-up window appears when a user attempts to save the envelope, either by moving from one screen to the next, or by resuming the draft from the **My Filings** screen.

Figure 11.2 – Cannot Resume Envelope

b. Click the icon to file into the case.

   Note: The system will not allow subsequent filings into cases not accepted by the court.

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

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

d. Click the Filings button to save and continue.

e. Enter the filing details for the case.

   A filer is required to resubmit documents when changing a filing code.
   Note: An error message is displayed instructing the filer to resubmit documents if the current filing code has changed.

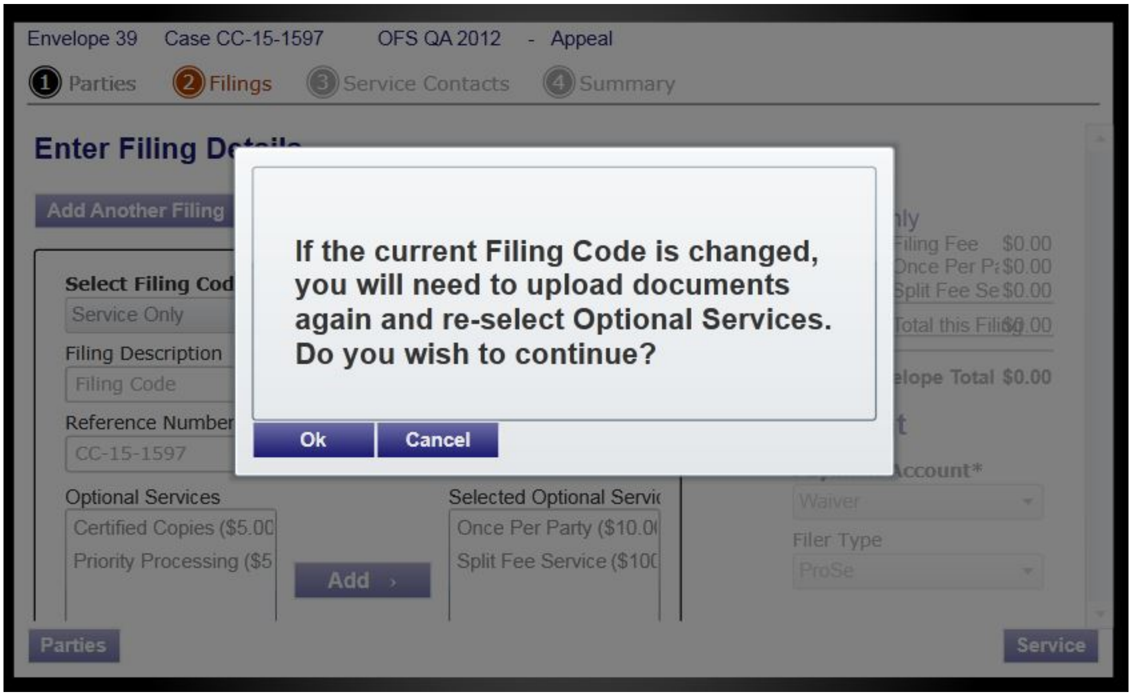


Figure 11.3 – Filing Code Error Message

f. Click the **Service** button to save and continue.

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

h. Click the **Summary** button to save and view a summary of the case.

i. Click the **Submit** button to submit the filing.

File Into a Case Not Listed

Filers can submit subsequent filings for cases that are not yet indexed in locations that use a non-bidirectional CMS integration. This feature allow users who cannot locate a case because it is not part of the case index to file into the case as if it were found using the **Case Search** option.

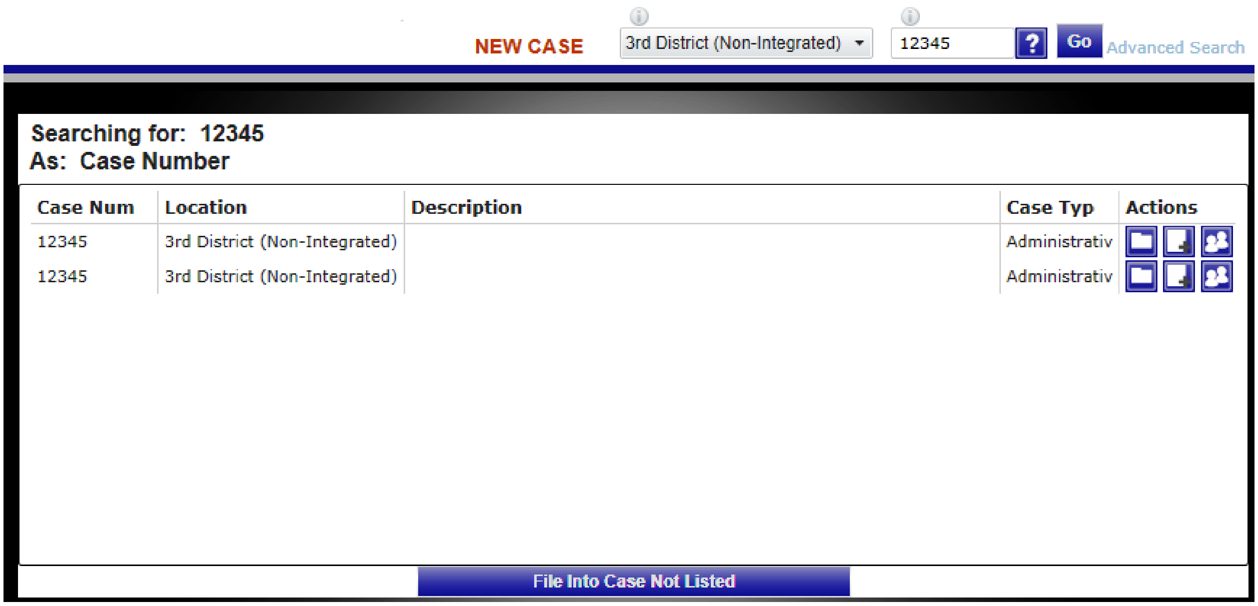


Figure 11.4 – Case Search Results

Perform the following steps to file into a case not listed in the search results:

Note: The system no longer allows subsequent filing into cases that have not been accepted by the court.

1. Select a location using the drop-down list.
2. Type a case number in the case number search field.
3. Click the *Go* button.

   The system displays an error message stating case not found.
4. Click the *File Into Case Not Listed* button.

File Into a Case through Case Search

Filers can search for a case using the **Case Search** option and initiate a subsequent filing for cases that are found.

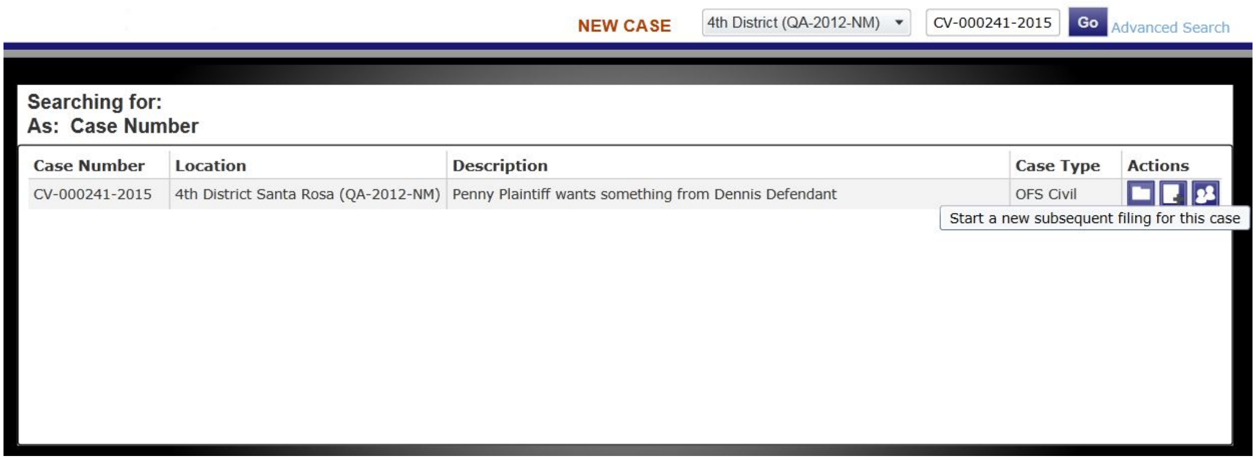


Figure 11.5 – Case Search Results

Perform the following steps to file into a case found in the search results:

1. Select a location using the drop-down list.
2. Type a case number in the **Case Number** search field.
3. Click the Go button.

   The system displays the search results.
4. Locate the case you want to file into on the list.

   Note: The system no longer allows subsequent filing into cases that have not been accepted by the court.
5. Click the icon.

   The filing process begins.

Viewing the Envelope Details

From the **Filings** screen, you can see the information entered for the envelope, the filing details, and the documents submitted.

Perform the following steps to view the envelope details:

1. Click the WORKSPACE link at the top of the page.

   Note: This will take you to the Filings screen.

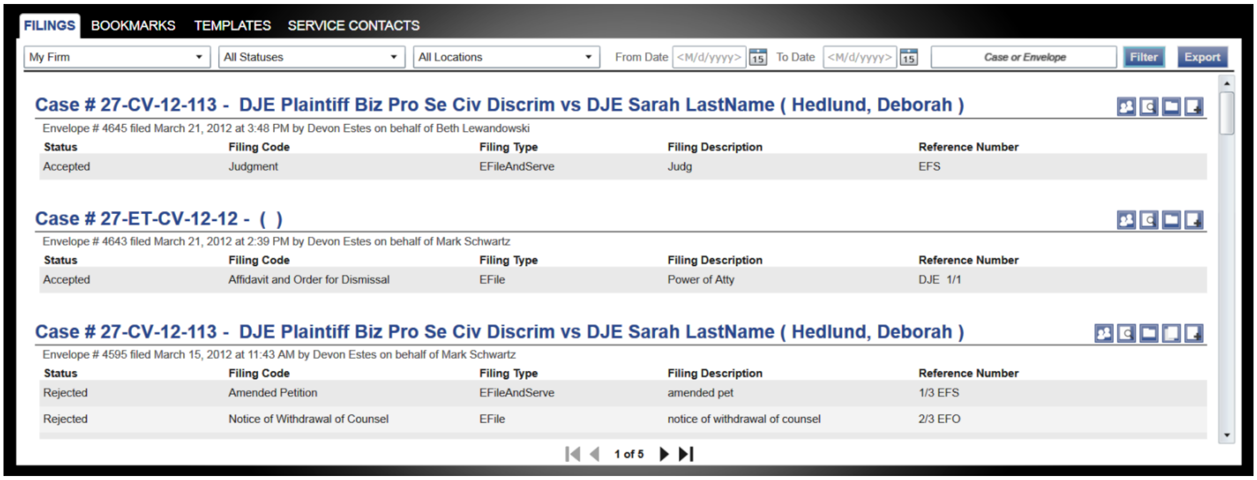


Figure 11.6 – Filing Screen

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

3. Click the  icon for the details of the envelope you want to view.

   This action opens the **Envelope Details** window. Here, you can view the **Case Information**, the **Fees**, the **Payment** information, the **Service** type, the case type, the case status, and the documents attached to the case.

   Note: When a reviewer returns a filing, the status of Returned is displayed on the *Filings* page.

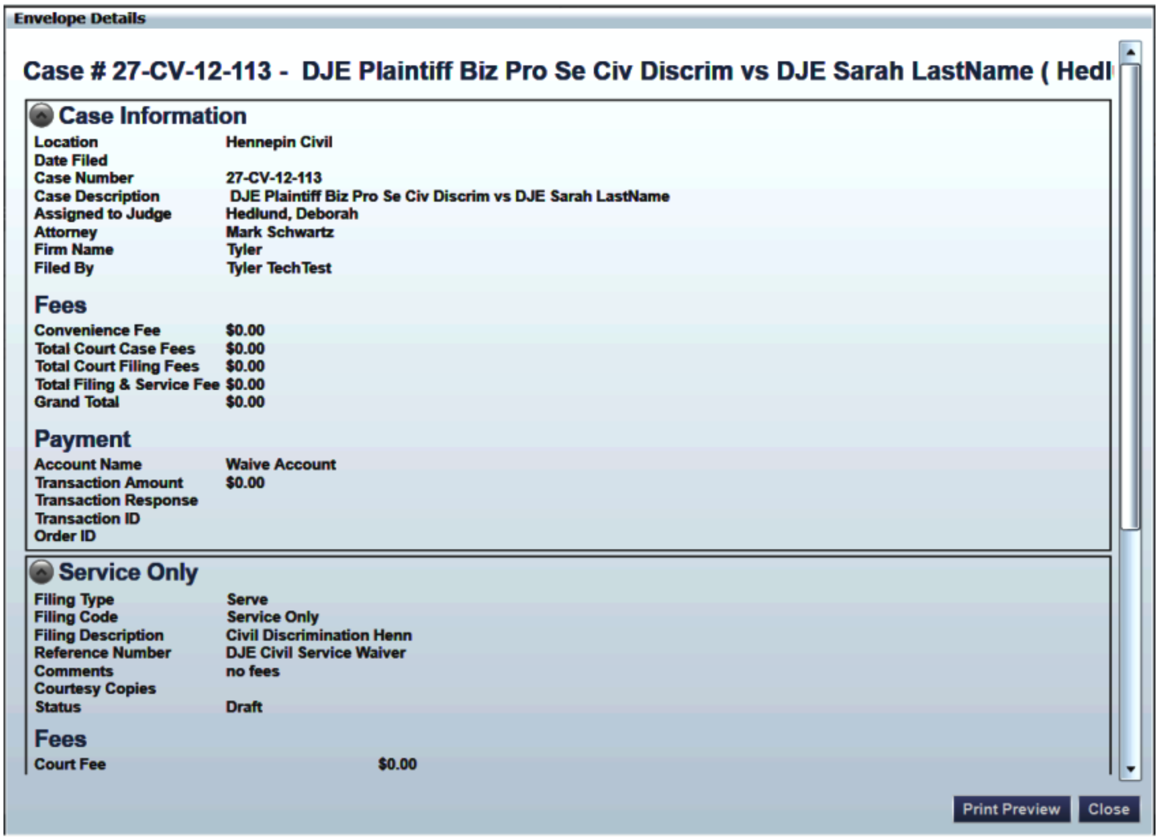


Figure 11.7 – Envelope Details Screen

> **Note: If the Service check box was selected during the filing process, the type of service is displayed.**
> **A filer can review the error message in the Document Error Information section of the Details page when a Service Only filing submission fails.**

4. Click the **Print Preview** button to open a printable version of the envelope details, or click the **Close** button when you are done to take you back to the **Filings** screen.

Chapter 12 My Account

Topics Covered in This Chapter

- ♦ Changing the User Password
- ♦ Adding Payment Accounts
- ♦ Changing the Security Question
- ♦ Managing Email Notifications

The **My Account** page displays the **Change Password**, **Payment Accounts**, **My Information**, and **Manage Notifications** tabs.

You can change your password and your security question using the **Login – Change Password** tab.

You can add or update a payment account using the **Payment Accounts** tab.

You can update your user and contact information using the **My Information** tab.

You can manage the e-mail notifications that you wish to receive using the **Manage Notifications** tab.

Changing the User Password

You can change your password using the **Login – Change Password** screen.

Figure 12.1 – Login – Change Password Screen

Note: Your password is case sensitive and must be at least six characters in length.

Perform the following steps to change the user password:

1. Click the MY ACCOUNT link at the top of the page.

   The Change Password tab opens the **Login – Change Password** screen.
2. Complete the **Login – Change Password** form by entering your account information.

Note: You can unlock your account by using the Forgot Password? option. If a security question is associated with the account, you will not have to contact the Firm Administrator to reset your password.

3. Click **Save** to change your password, or click **Cancel** to exit without changing your password.

Adding Payment Accounts

The system requires all users to have a payment account.

Perform the following steps to add a payment account:

1. Click the MY ACCOUNT link on the top menu on the home page.
2. Select the **Payment Accounts** tab.

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

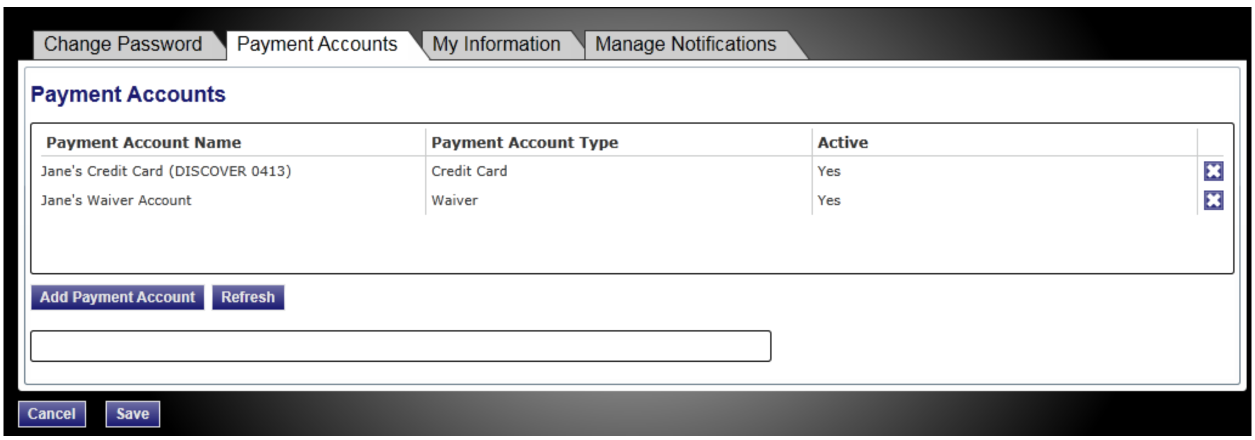


Figure 12.2 – Payment Accounts Tab

3. Click the **Add Payment Account** button.
4. Type a payment account name.
5. Select a payment account type (cash, credit card, draw down, or waiver) from the drop-down list.

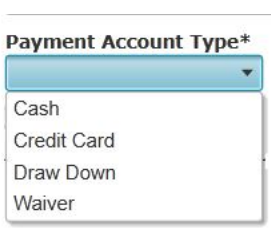


Figure 12.3 – Payment Account Type Drop-Down List

   a. Select **Cash** if the payment account is cash.

Figure 12.4 – Add Payment Accounts

b. Select **Credit Card** if the payment account is a credit card.

c. Click the Enter Credit Card Information button to enter the credit card information.

Note: The system may re-direct you to a secure payment processing site to enter the credit card information. You may need to turn off your browser's pop-up blocker to be able to add the credit card information.

d. Select **Draw Down** if the payment account is a draw-down account.

e. Click the Enter Draw Down Information button to select a draw-down account.

The **Draw Down** selection window opens.

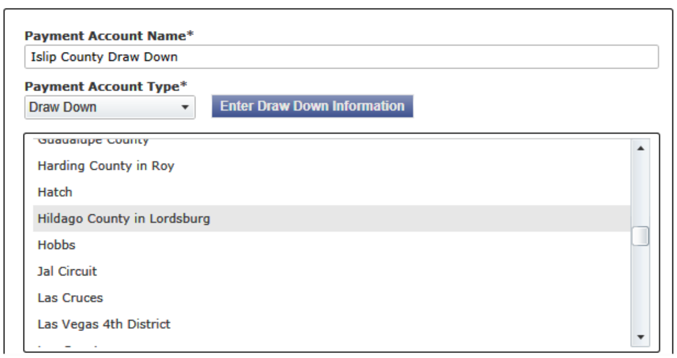


Figure 12.5 – Draw Down Selection Window

f. Select a draw-down account from the drop-down list.

g. Select **Waiver** if the payment account is a waiver.

Note: The Active check box appears when the *Waiver* payment account type is selected.

h. Select the Active check box to activate the payment account.

i. Select the Available at all locations check box to make the selected payment type available at all locations associated with the payment account.

6. Click the Save Changes button to save the changes and continue, or click the Cancel button to cancel any changes made.

The system displays the payment account information at the top of the screen.

Changing the Security Question

You can change your security question.

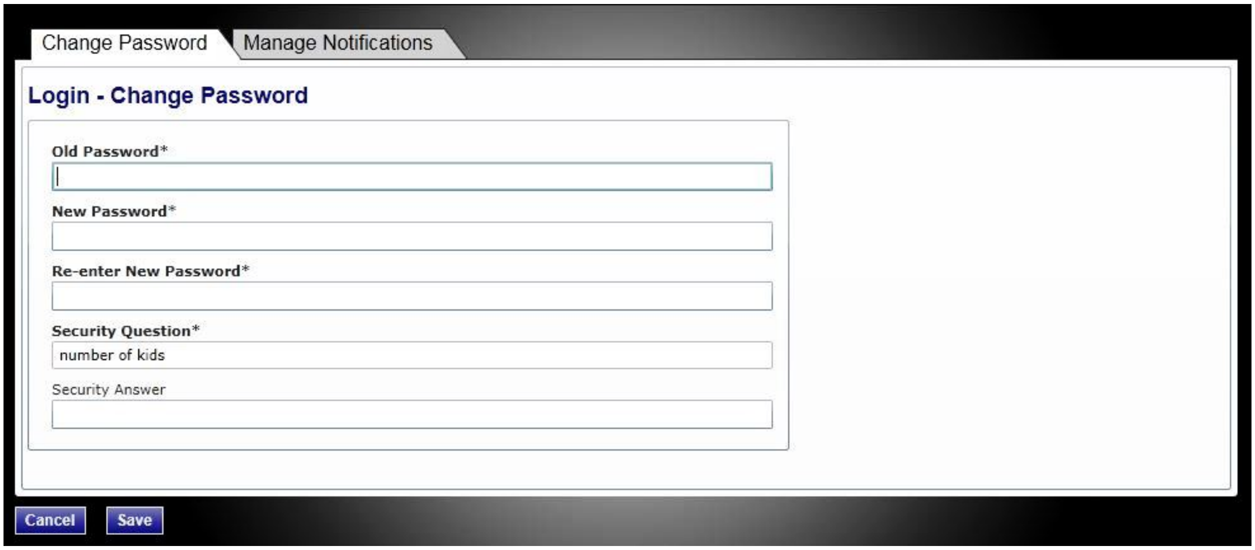


Figure 12.6 – Change the Security Question

Perform the following steps to change the security question:

1. Click the MY ACCOUNT link at the top of the page.

   The Change Password tab opens the **Login – Change Password** screen.
2. Change your security question and answer by entering your new information in the **Security Question** and **Security Answer** fields.
3. Click Save to change your password, or click Cancel to exit without changing your password.

MANAGING EMAIL NOTIFICATIONS

You can manage the email notifications that you wish to receive from eFileTexas.gov using the **Manage Notifications** tab on the **My Account** screen.

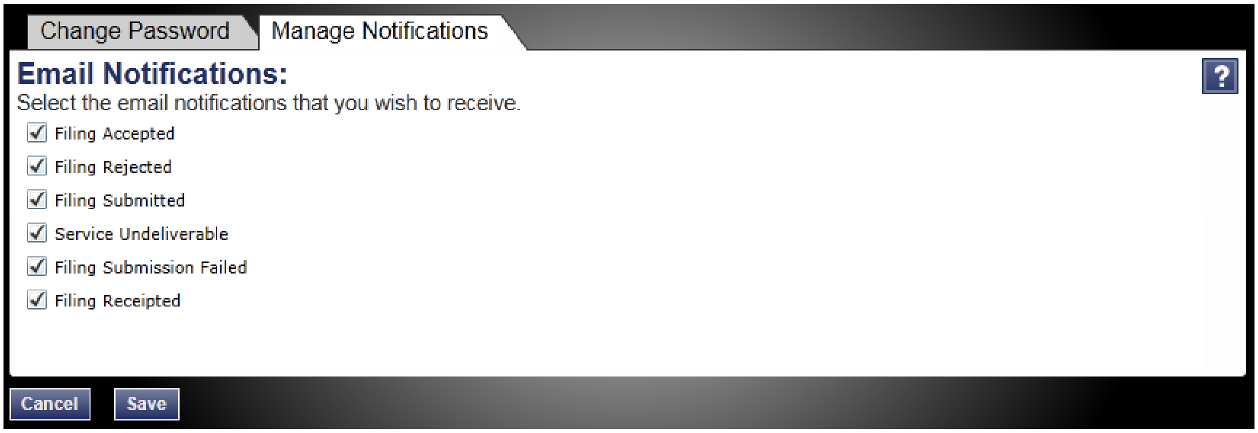


Figure 12.7 – Manage Notifications Screen

Perform the following steps to manage your e-mail notifications:

1. Select the **Manage Notification** tab on the **My Account** screen.
2. Select the notifications you want or clear the notifications you do not want to receive.
3. Click the Save button to save your selection; click the Cancel button to cancel.

Chapter 13 Bookmarks

The **Bookmark** screen displays a list of case numbers and descriptions for the cases you have bookmarked. Only you and your firm (depending on the firm setup) may see this information. Neither the public nor any other firm will be able to see your case list.

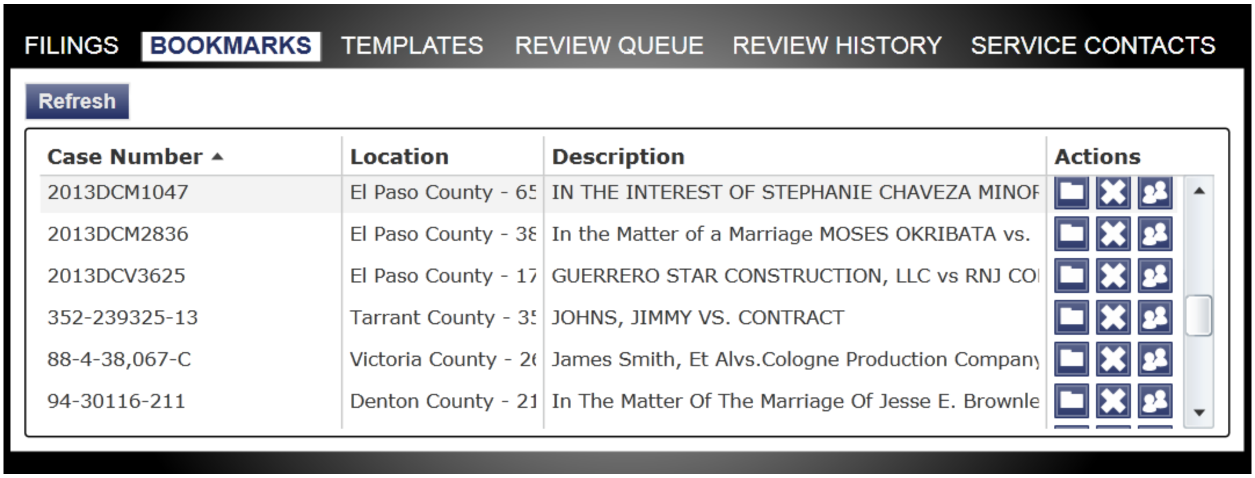


Figure 13.1 – Bookmark Cases

View Bookmarked Cases

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

Refreshing the Bookmarked Cases List

You can manually refresh the **Bookmarks** screen as changes are made to the system. Click the **Refresh** button to refresh the **Bookmarks** page.

Filtering the Bookmarked Cases List

You can filter the bookmarked cases list by clicking on the arrows in the *Case Number*, *Location* and the *Description* columns.

Filing into an Existing Case

Click the icon under the **Actions** column on the **Bookmarks** screen when filing into an existing case, page .

Removing a Case from the Bookmark List

You can remove a case from the bookmarked case list by clicking the icon under the **Actions** column on the **Bookmarks** screen.

Add Service Contact to the Case

You can add service contacts to the case selected by clicking the icon under the **Actions** column on the **Bookmarks** screen.

Chapter 14 Filings

Topics Covered in This Chapter

After you have uploaded and submitted your filing, the filing is displayed in the **Filings** queue. From here, you can view the status of your filing, check the filing type, get a document description, see your number assigned to the case, review the details of the case, and cancel a filing.

View Filings

You can access the **Filings** screen after initiating a case, filing into a subsequent case, or by going to the **Filing** screen directly.

Click the WORKSPACE link at the top of the page. This will take you to the **Filings** screen.

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

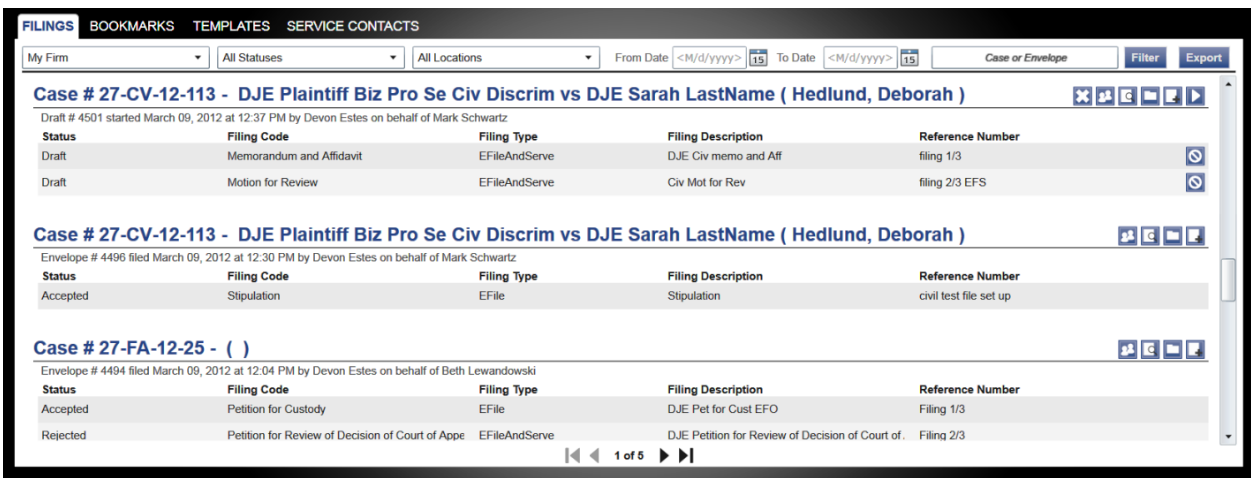


Figure 14.1 – Filings Screen

Filtering the Filings Queue

The **Filings** queue screen displays the status of each filing. The status information is located in the status column on the **Filings** screen. You will only see the status for the filings that you or your firm have submitted when logged on to the system, not all filings related to a case.

Note: Only you and your firm may see this information.

1. Select **Filings** on the toolbar.

All relevant information is displayed concerning your filings.

2. Select the filter parameters using the drop-down lists, or enter specific information in the search fields.

   Note: For the From Date or the To Date, click the icon to select dates from a calendar, or you can type the dates manually (for example, `9/9/2010`).

Figure 14.2 – Select the Dates Using the Calendar

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

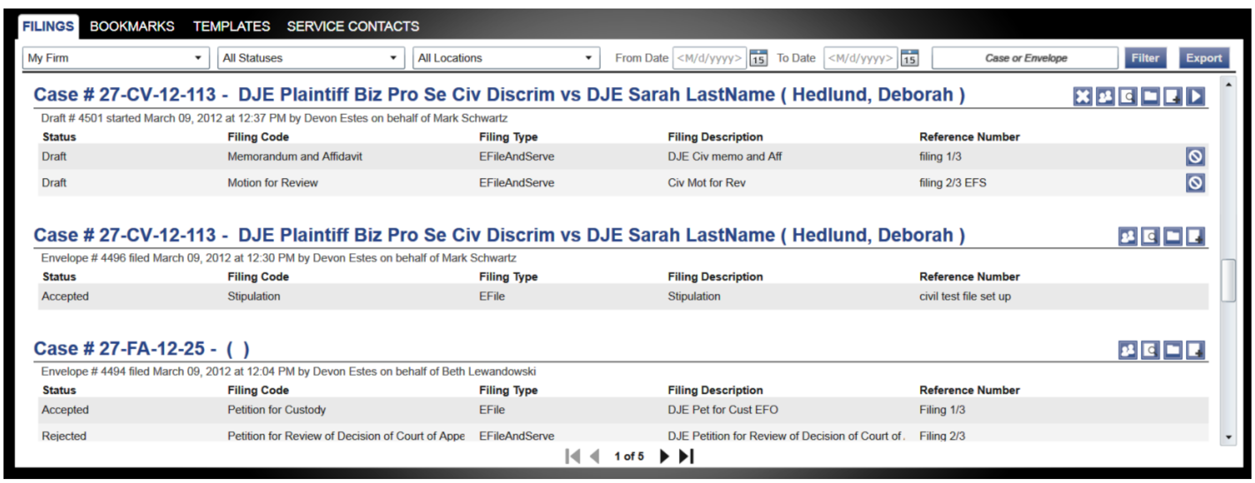


Figure 14.3 – Filings Screen

Note: To clear the filter, select Filings on the toolbar.

A list of cases meeting your search criteria is displayed.

Exporting E-filing Transactions

You can export a copy of the filings in the **Filings** queue to your computer using the **Export** option.

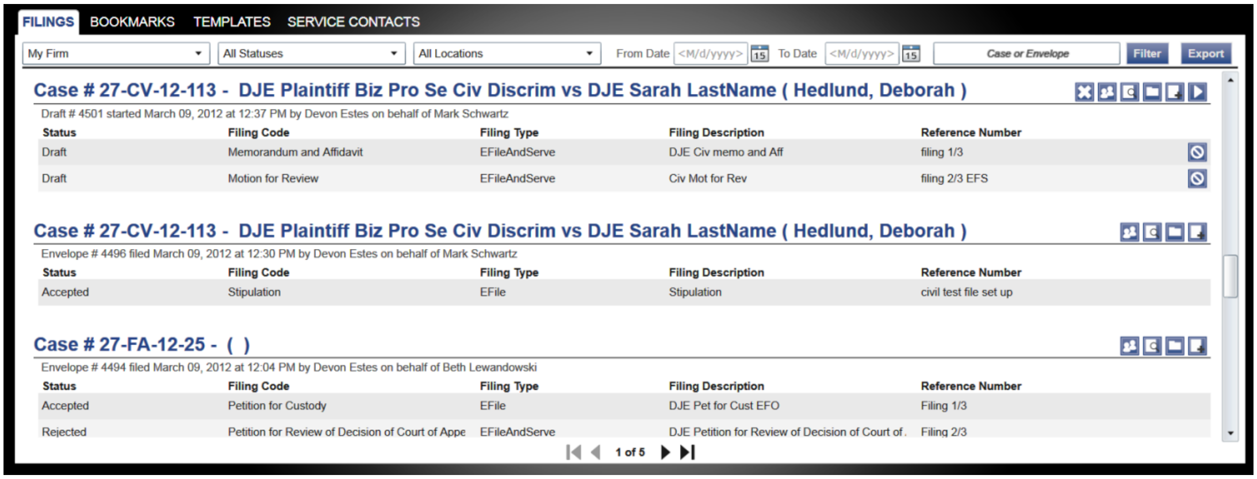


Figure 14.4 – Filings Screen

Perform the following steps to export a copy of your filings to your computer:

1. Select the **Filings** tab on the toolbar.
2. Click the **Export** button.

   The Windows Explorer window opens on your screen. This will allow you to export your filings to a Microsoft Office XML file.
3. Type a file name in the **File name** field provided.

Figure 14.5 – File Name Field

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

The files are saved on your computer.

Viewing the Export File

Once the file has been exported, navigate to the location where the file was saved and open the file. Depending on the operating system (Windows or Mac) and programs installed on your computer, your options here will vary. If Microsoft Excel (or a similar application) is installed on your computer, using it is the simplest way to view the data.

When the XML file is opened, there will be two worksheets – one named Envelopes and one named Filings. Most users find the Envelopes worksheet easier to use for reconciliation of credit card statements, as the Filings worksheet will contain multiple rows of data for envelopes created with multiple filings. Currently, the Export contains the following fields in the Envelopes worksheet: Order ID, Case, Case Description (Case Style), Filed Date, Court Fee, Service Fee, Convenience Fee, Total Fee, Response, Capture Date, Accept Date, Account, Responsible Party, Envelope #, Reference Number.

Using Microsoft Excel (or a similar application) provides the ability to sort, filter, and total the data being exported. Once the data has been sorted and filtered as appropriate, the 'Total Fee' column can be totaled using a formula. The Reference Number field is designed to be a way to link the client file in your office back to the filings created and is used for internal purposes only. When e-filing a document and using the Reference Number in this manner, it will assist in reconciliation of charges to client files.

Copying the Envelope

You can copy an envelope to create a new envelope to resubmit to the courts using the icon on the **Filings** screen if your filing has been rejected.

Note: The icon is gray and unavailable if the envelope was previously copied.

Perform the following steps to copy the envelope:

1. Click the **Filings** link on the menu.

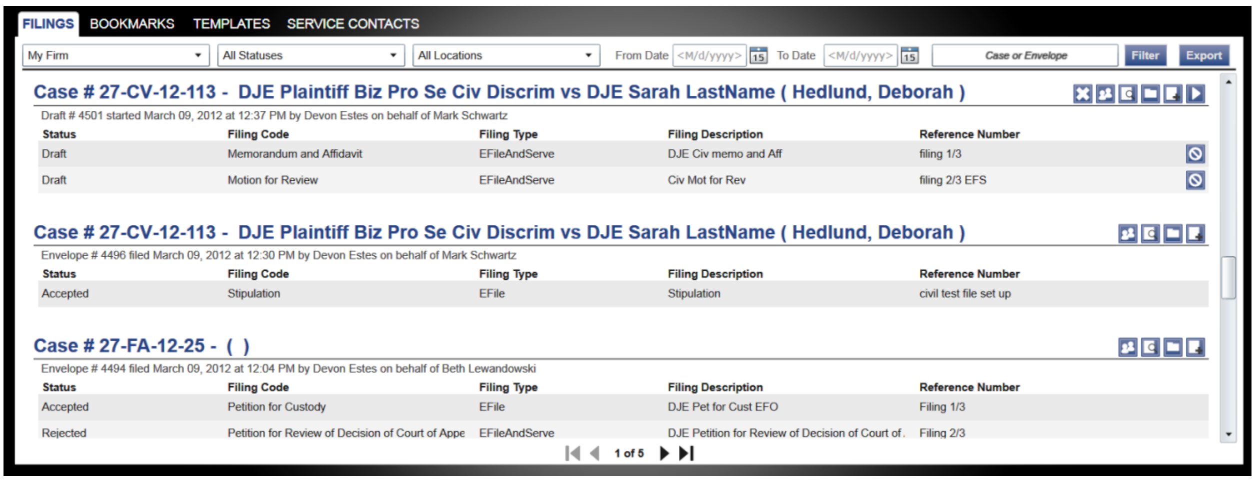


Figure 14.6 – Filings Screen

2. Select a case to copy on the **Filings** screen.

3. Click the icon on the selected case to copy the envelope.

Viewing the Envelope Details

From the **Filings** screen, you can see the information entered for the envelope, the filing details, and the documents submitted.

Perform the following steps to view the envelope details:

1. Click the WORKSPACE link at the top of the page.

   Note: This will take you to the Filings screen.

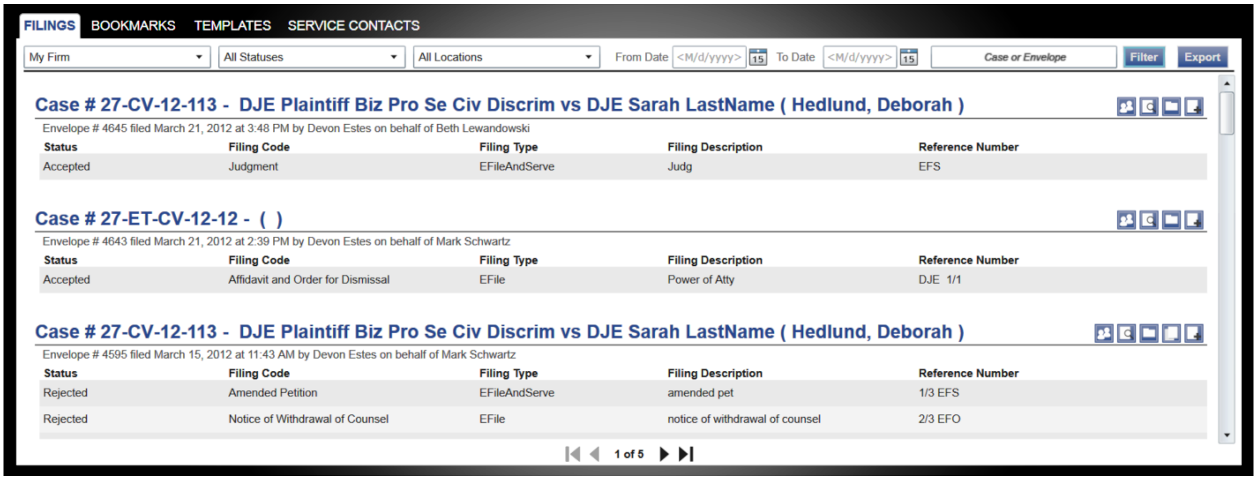


Figure 14.7 – Filing Screen

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

3. Click the  icon for the details of the envelope you want to view.

   This action opens the **Envelope Details** window. Here, you can view the **Case Information**, the **Fees**, the **Payment** information, the **Service** type, the case type, the case status, and the documents attached to the case.

   Note: When a reviewer returns a filing, the status of Returned is displayed on the *Filings* page.

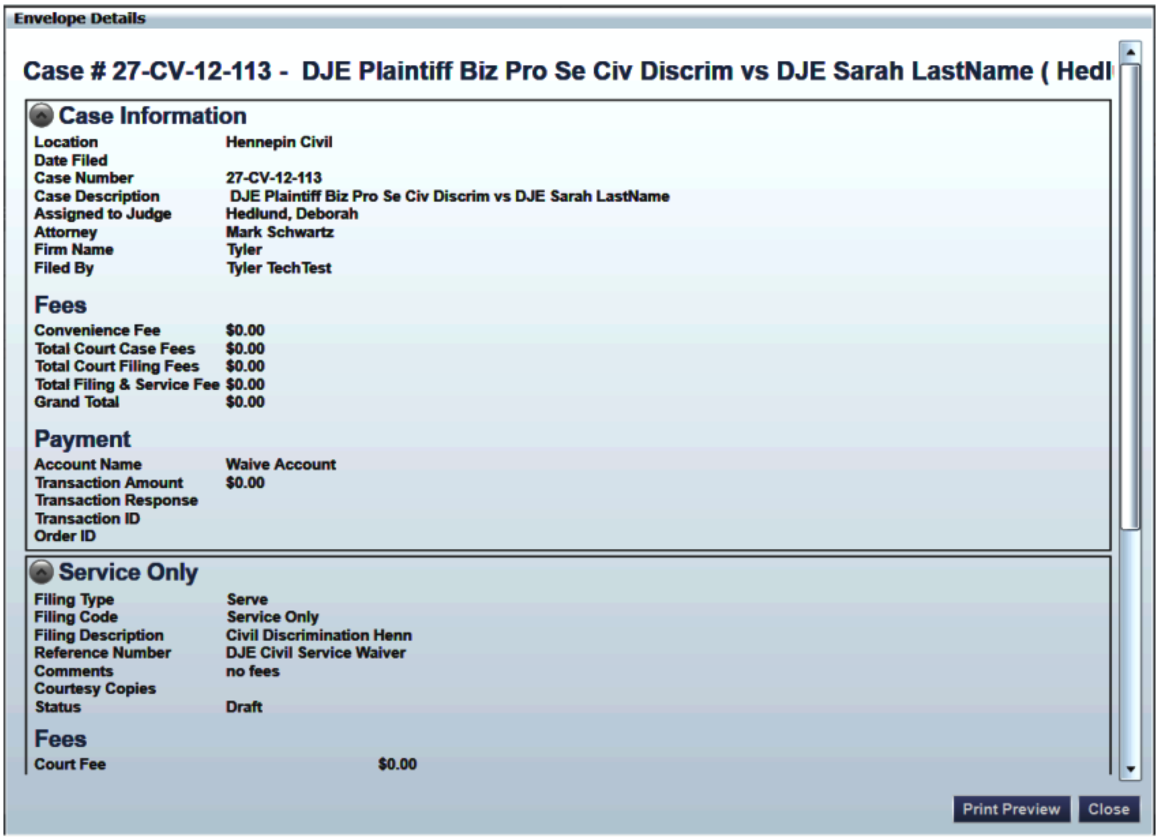


Figure 14.8 – Envelope Details Screen

Note: If the Service check box was selected during the filing process, the type of service is displayed.
A filer can review the error message in the Document Error Information section of the Details page when a Service Only filing submission fails.

4. Click the **Print Preview** button to open a printable version of the envelope details.

Note: The system now displays the Comments section on the Print Preview page.

Print this page

Case # CC-15-3281

Case Information	
Location	OFS QA 2012
Date Filed	
Case Number	CC-15-3281
Case Description	
Assigned to Judge	
Attorney	
Firm Name	
Filed By	Individual Filer
Fees	
Convenience Fee	$0.00
Total Court Case Fees	$0.00
Total Court Party Fees	$0.00
Total Court Filing Fees	$0.00
Total Court Service Fees	$0.00
Total Filing & Service Fees	$0.00
Total Service Tax Fees	$0.00
Total Provider Service Fees	$0.00
Total Provider Tax Fees	$0.00
Grand Total	$0.00
Payment	
Account Name	eCheck
Transaction Amount	$0.00
Transaction Response	
Transaction ID	
Order #	

Abstract Of Judgment		
Filing Type	EFile	
Filing Code	Abstract Of Judgment	
Filing Description		
Reference Number		
Comments		
Status	Draft	
Fees		
Court Fee	$0.00	
Service Fee	$0.00	
Documents		
Lead Document	Basic Color.pdf	[Original]

Figure 14.9 – Print Preview Page

5. Click the **Print this page** link to print the summary.
6. Click the **Close** button.

This action takes you back to the **Filings** screen.

Adding Service Contacts to the Firm

You can add service contacts to the **Service Contacts** list.

Perform the following steps to add service contacts to the **Service Contacts** list:

1. Click the SERVICE CONTACTS link at the top of the window.

   This opens the **Service Contacts** page.

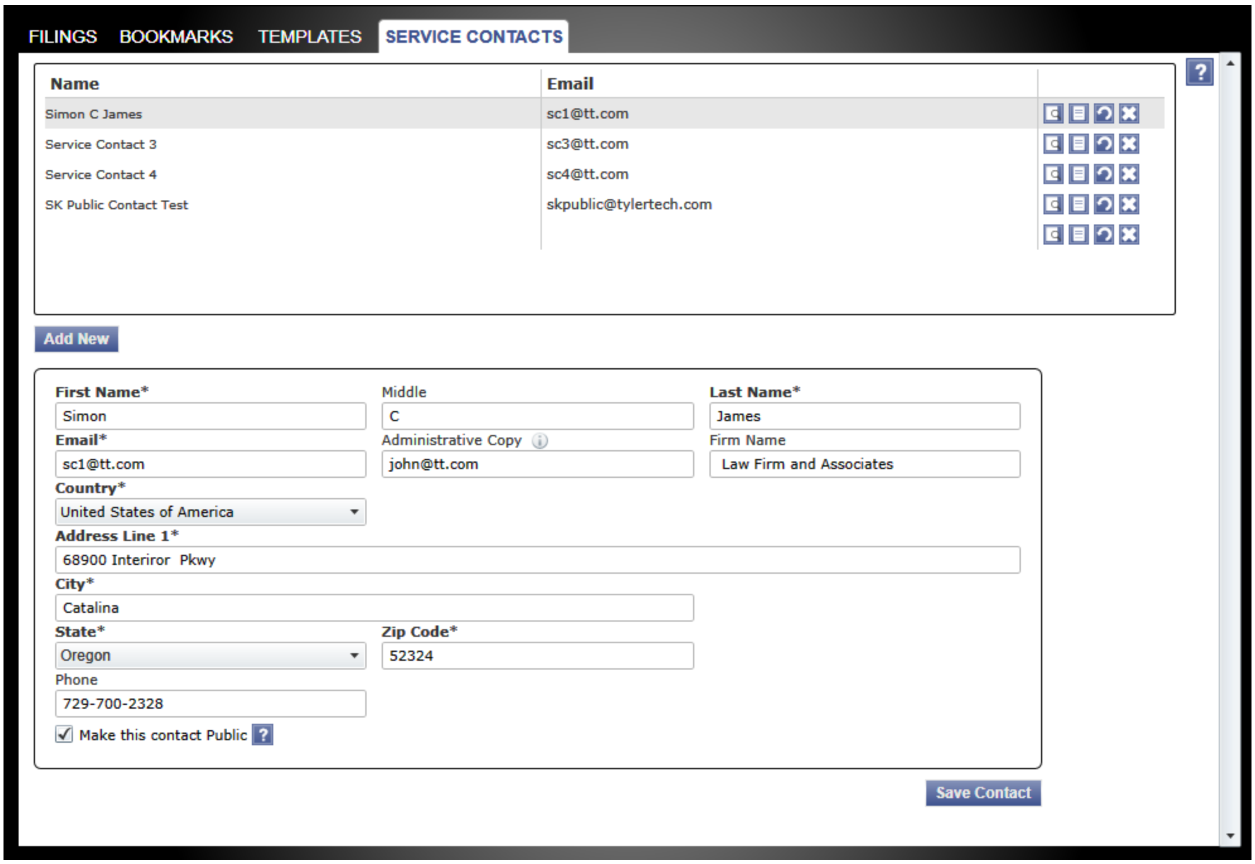


Figure 14.10 – Adding Service Contacts Form

2. Click the **Add New** button in the middle of the window.

   The **Add Service Contacts** form opens.
3. Complete the **Add Service Contacts** form by providing the applicable information.

   Note: An asterisk (*) indicates required information.
4. Type an e-mail address in the **Administrative Copy** field.

   A courtesy copy of the service notification is sent to the e-mail address entered in this field. The administrative e-mail is an optional e-mail for the delivery of service. Delivery to this address is not considered a determining factor for the completion of e-service.
5. Select the **Make this contact Public** check box to make the contact available to any filer.

Note: Selecting this check box is helpful when the contact is the defendant in a court action.

6. Click the **Save** button to save the contact to the **Service Contacts** list.

   The new contact information displays in the **Service Contact** list.

Resuming the Filing Process

You can resume the filing after you have logged out of the system or exited the filing process. To do this, use the **Filings** link to access the **Filings** screen to access your case and resume the filing.

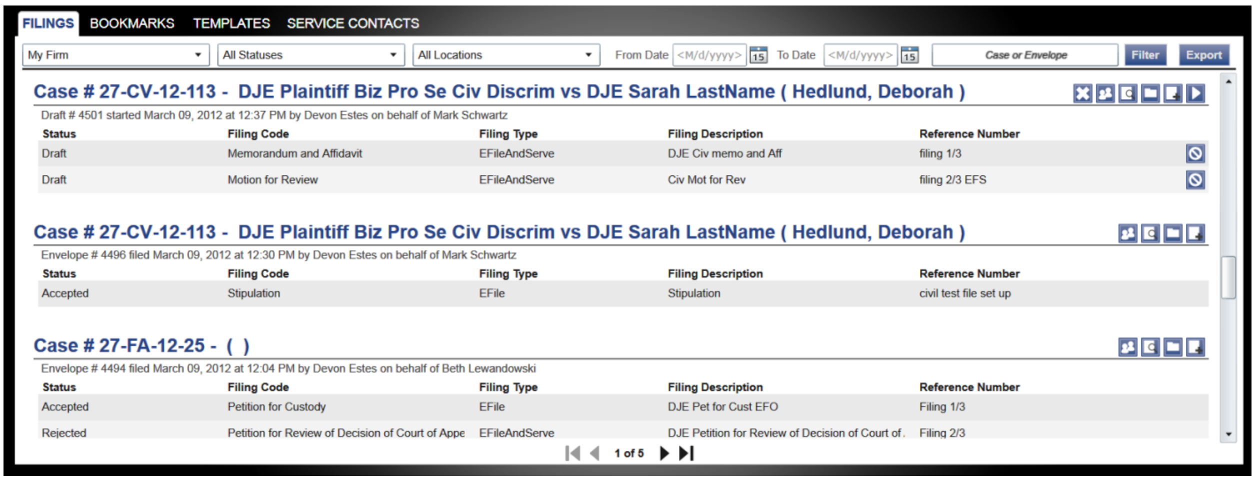


Figure 14.11 – Filings Screen

Perform the following steps to resume the filing process on the case:

1. Select **Filings** on the toolbar.
2. Select a case or an envelope on the **Filings** screen to resume a filing.
3. Click the icon for the selected case to resume the filing process. This opens the last saved pages in your envelope or case to continue the filing process.

Canceling a Filing

You can cancel a filing you have submitted before it is accepted by the courts. Once the filing status changes to “Under Review” or “Accepted,” a filing cannot be canceled.

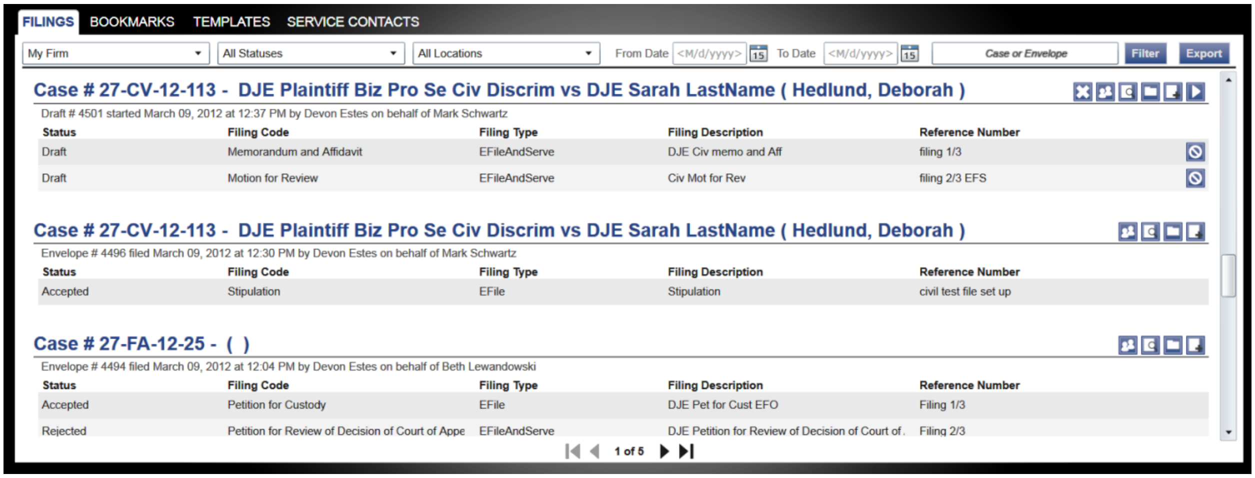


Figure 14.12 – Filings Screen

Perform the following steps to cancel the filing:

1. Click **Filings** on the toolbar.
2. Select a case or an envelope on the **Filings** screen to cancel.
3. Click the  icon for the selected case to cancel the filing.

Chapter 15 Service Contacts

Topics Covered in This Chapter

You can add service contacts to the case using the **Service Contacts** link.

Adding Service Contacts to a Case

You can add service contacts to a case.

Perform the following steps to add a service contact to a case:

1. Click the WORKSPACE link at the top of the screen.

   This action opens the **Filings** window.

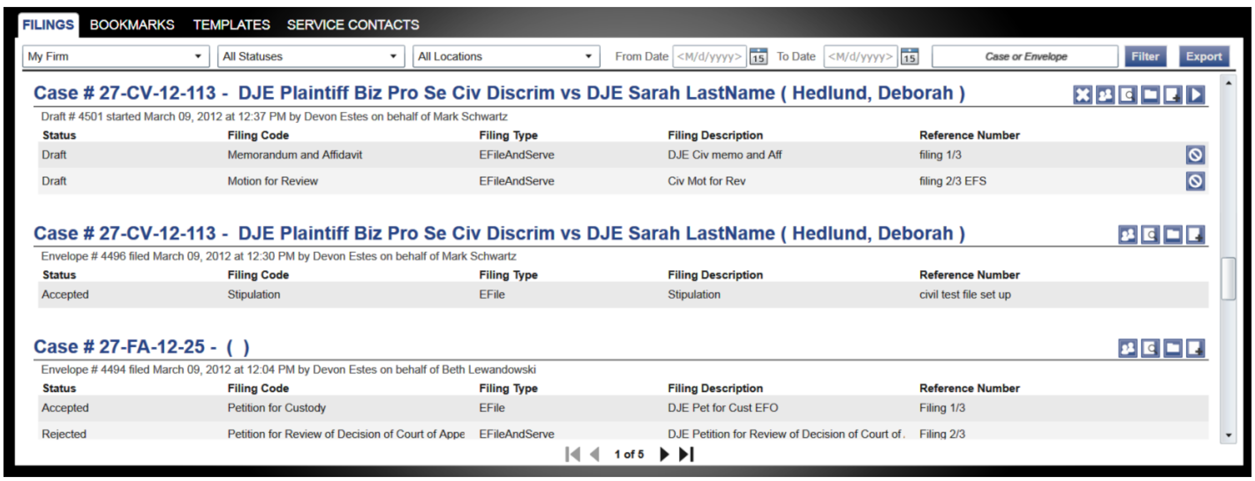


Figure 15.1 – Filings Window

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

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

   This opens the **Service Contacts** tab.

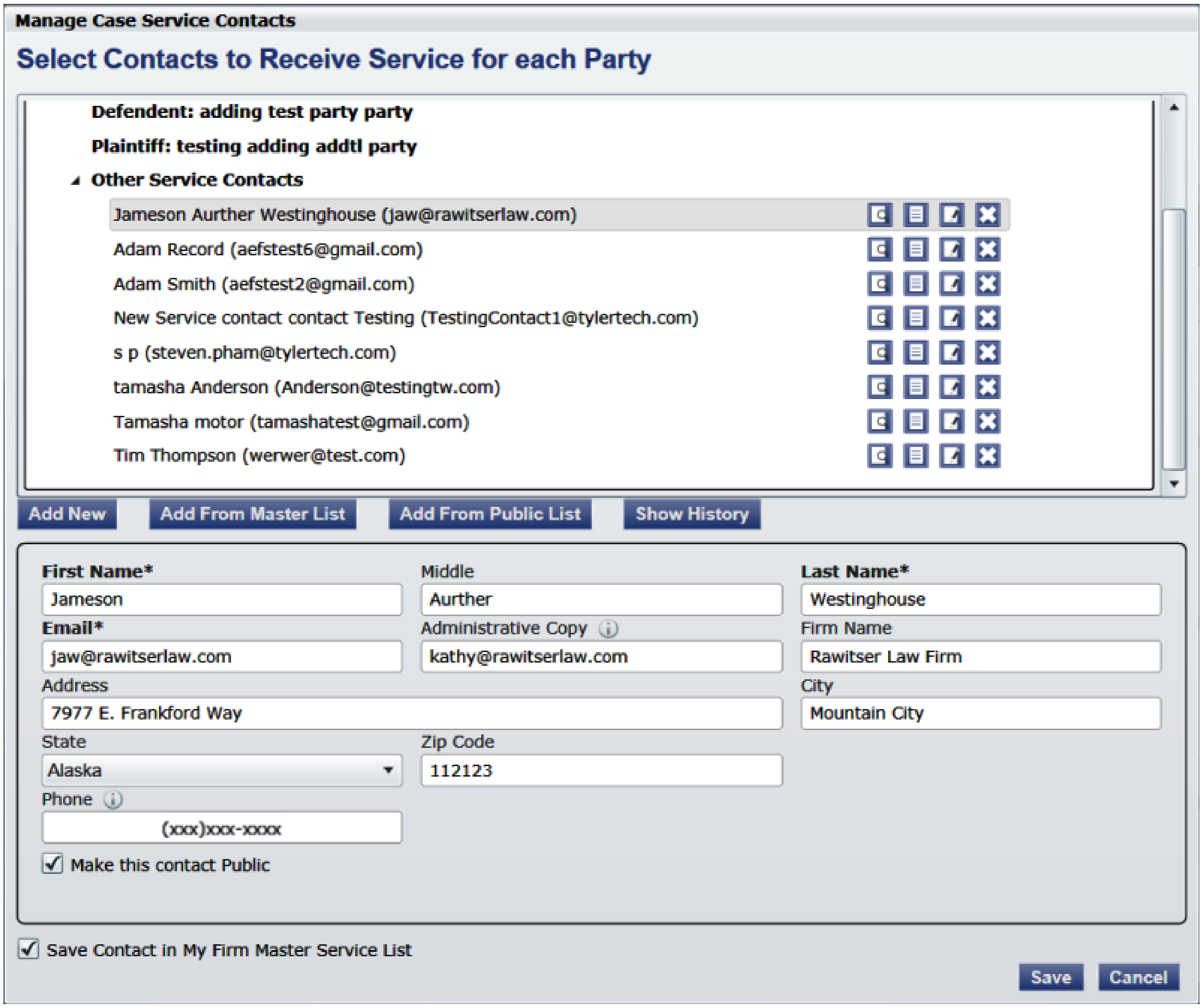


Figure 15.2 – Service Contacts Tab

4. Select the name of the service contact to add to the case, or click the **Add New** button in the middle of the window to add a new service contact.

   Note: If there is no email address next to the name of the service contact, the contact cannot be served. You will need to add an email address or add a new service contact to the case.

   The fields required to add a service contact are displayed.
5. Complete the add service contact fields by providing the applicable information.

   Note: An asterisk (*) indicates required information.
6. Type an e-mail address in the **Administrative Copy** field.

   The administrative e-mail is an optional additional e-mail for the delivery of service. Delivery to the email address is not considered a determining factor for the completion of e-service.
7. Select the **Make this contact Public** check box to make the contact public.
8. Select the **Save Contact in My Firm Master Service List** check box to save the contact to the firm's master service list.
9. Click the **Save** button to save the contact.

Adding Service Contacts from Master List

You can add service contacts to the **Case Service Contacts** list from the Master List.

Perform the following steps to add service contacts to the **Case Service Contacts** list:

1. Click the WORKSPACE link at the top of the screen.

   This action opens the **Filings** window.

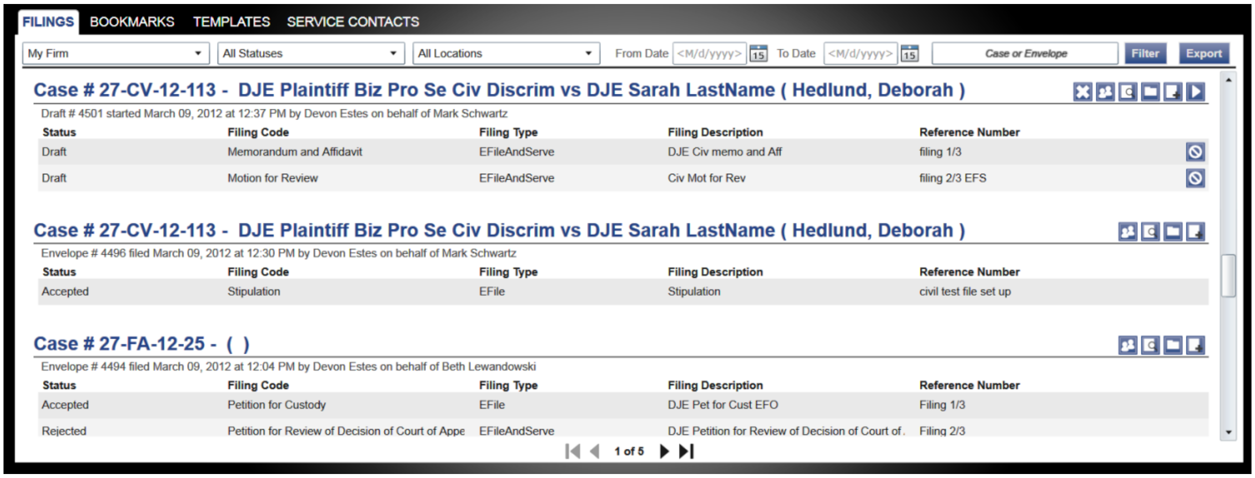


Figure 15.3 – Filings Window

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

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

   This opens the **Service Contacts** tab.

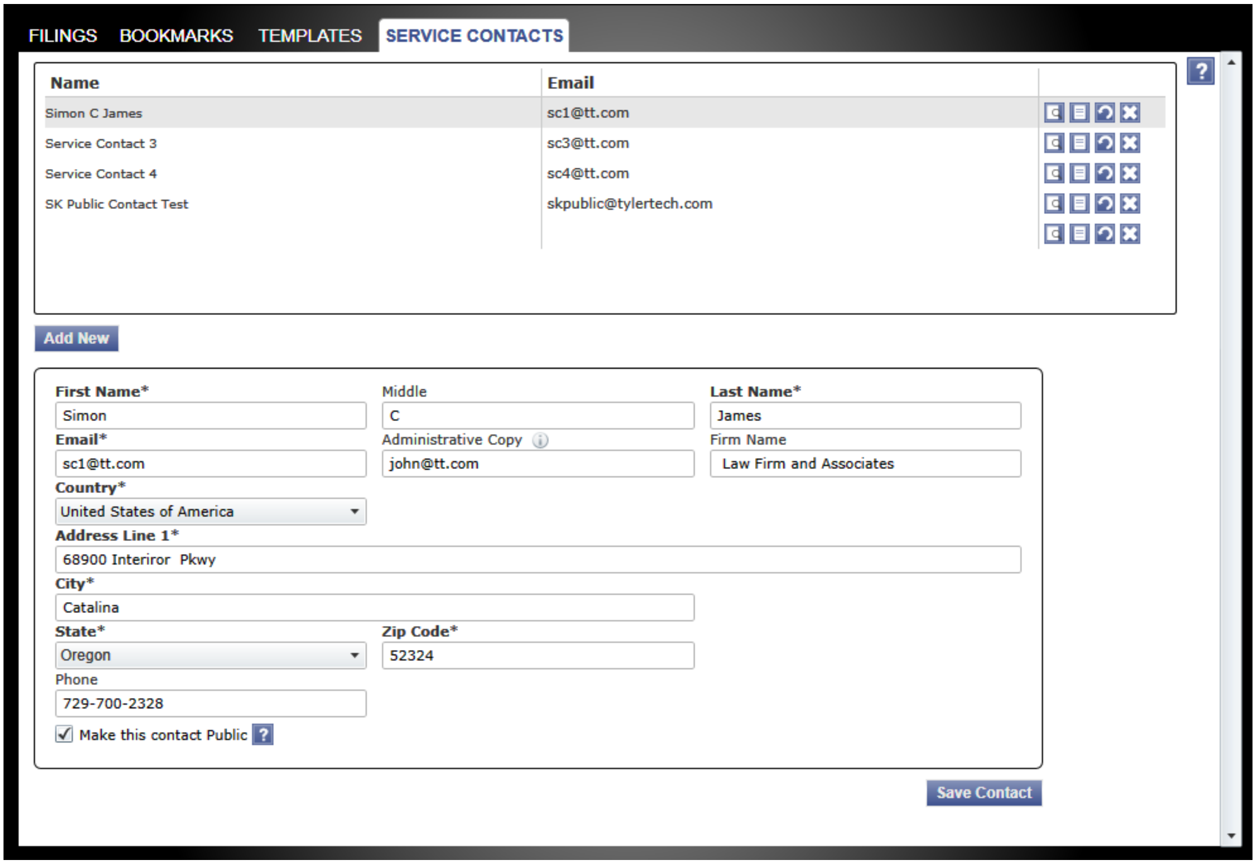


Figure 15.4 – Service Contacts Tab

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

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

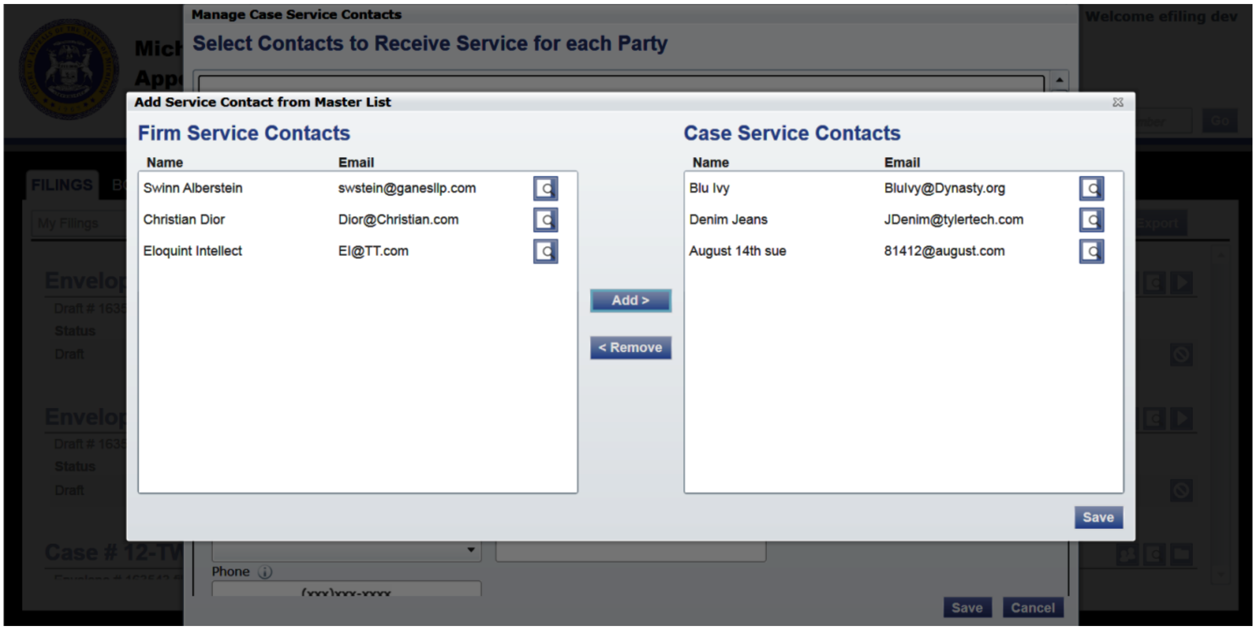


Figure 15.5 – Add Service Contact from Master List Window

5. Select the service contact from the **Firm Service Contacts** list.
6. Click the Add > button to add the service contact to the **Case Service Contacts** list.

   The new contact information is displayed in the **Case Service Contacts** list.
7. Select a contact from the **Case Service Contacts** list and click the < Remove button to remove the contact from the **Case Service Contacts** list.
8. Click the Save button to save the **Case Service Contacts** list.

Adding Service Contacts from Public List

You can add service contacts to the **Case Service Contacts** list from the public list of contacts.

Perform the following steps to add service contacts to the **Case Service Contacts** list:

1. Click the WORKSPACE link at the top of the screen.

   This action opens the **Filings** window.

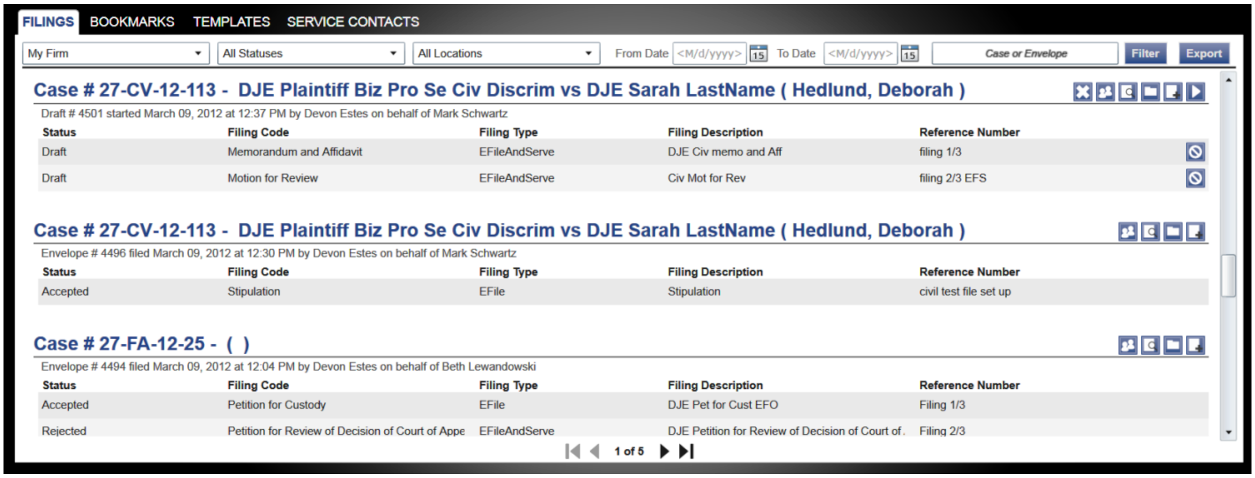


Figure 15.6 – Filings Window

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

   This action opens the **Manage Case Service Contacts** tab.

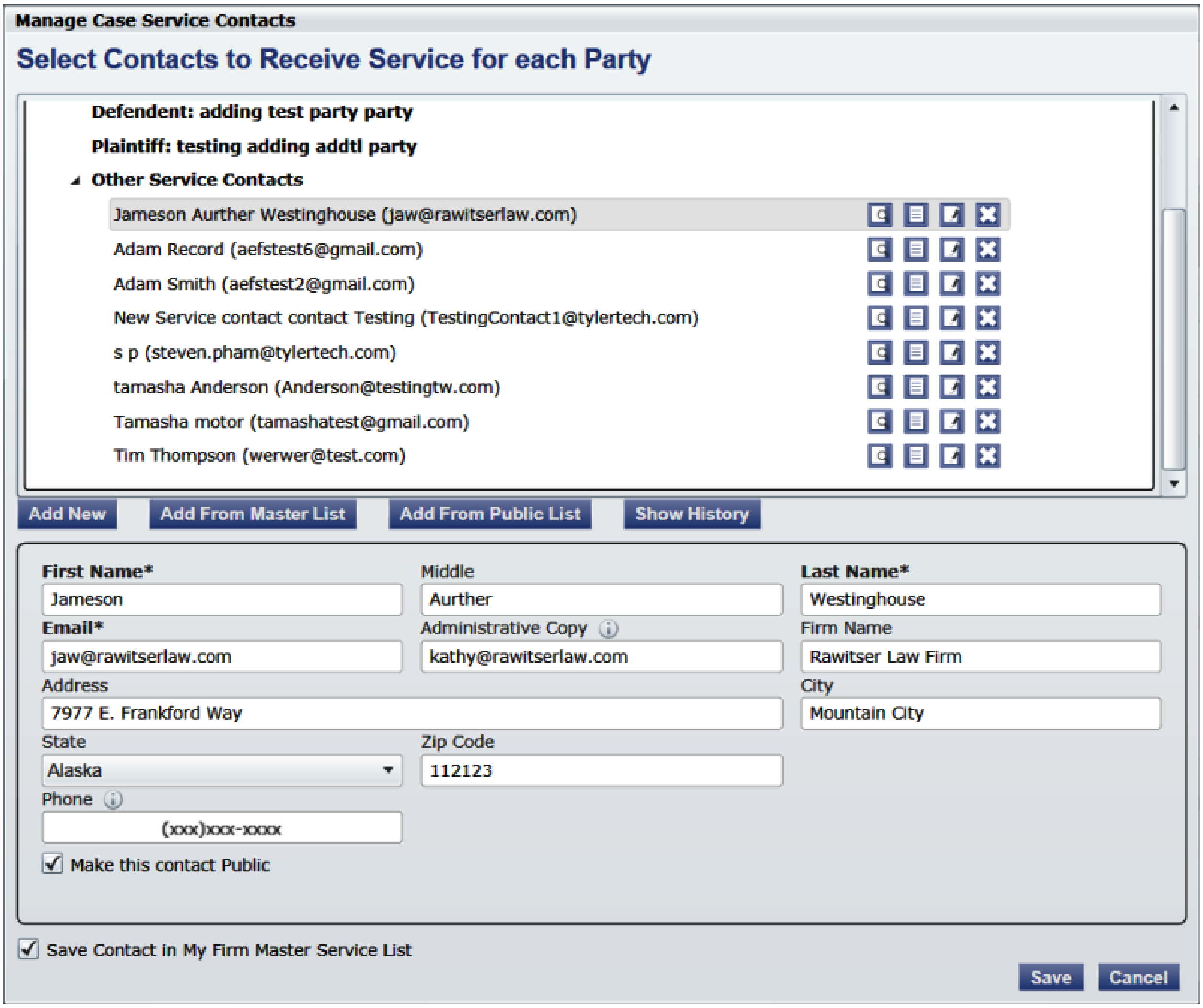


Figure 15.7 – Service Contacts Tab

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

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

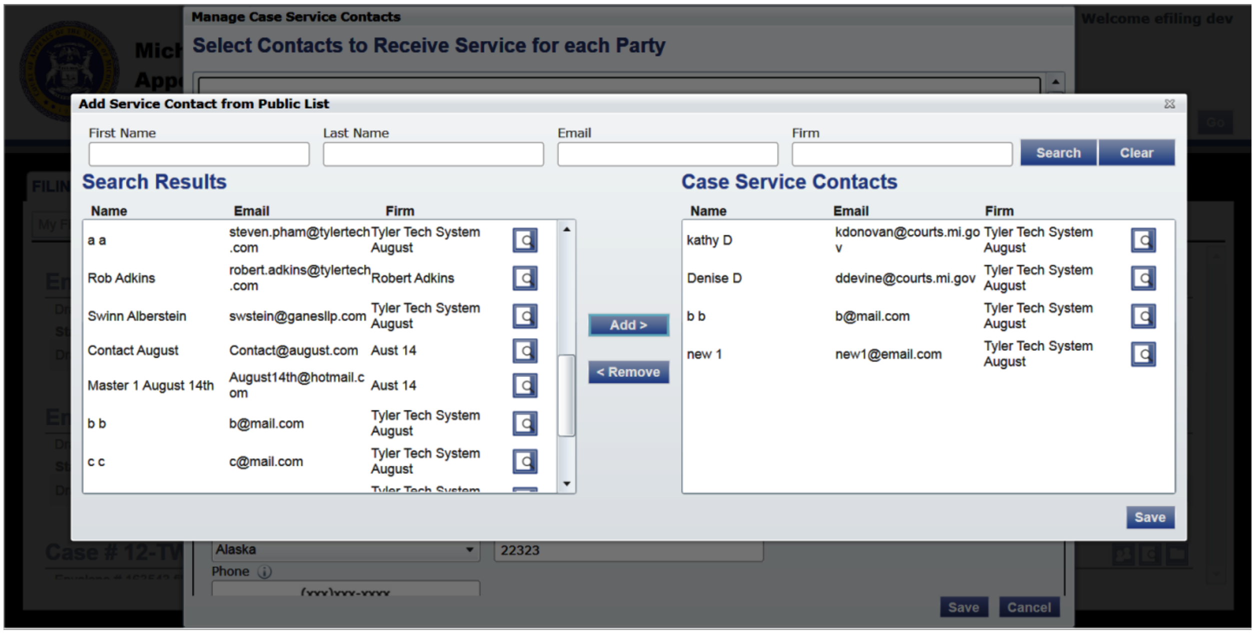


Figure 15.8 – Add Service Contact from Public List Window

5. Enter the name, e-mail address, or firm name in the fields provided, and then click the Search button to search for a specific service contact, or click the Search button to display all service contacts available.
6. Select the service contact from the **Search Results** list.
7. Click the Add > button to add the service contact to the **Case Service Contacts** list.

   The new contact information is displayed in the **Case Service Contacts** list.
8. Select a contact from the **Case Service Contacts** list and click the < Remove button to remove the contact from the **Case Service Contacts** list.
9. Click the Save button to save the **Case Service Contacts** list.

Viewing Service Contacts History

You can view the history of the service contacts attached to a case.

Perform the following steps to view the service contact's history:

1. Click the WORKSPACE link at the top of the screen.

   This action opens the **Filings** window.

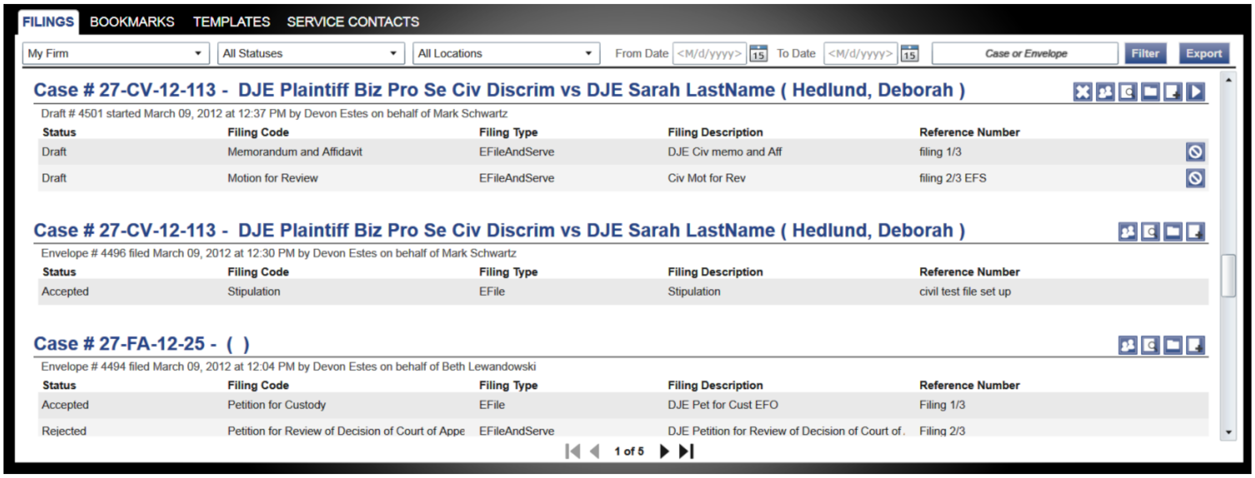


Figure 15.9 – Filings Window

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

   This opens the **Service Contacts** tab.

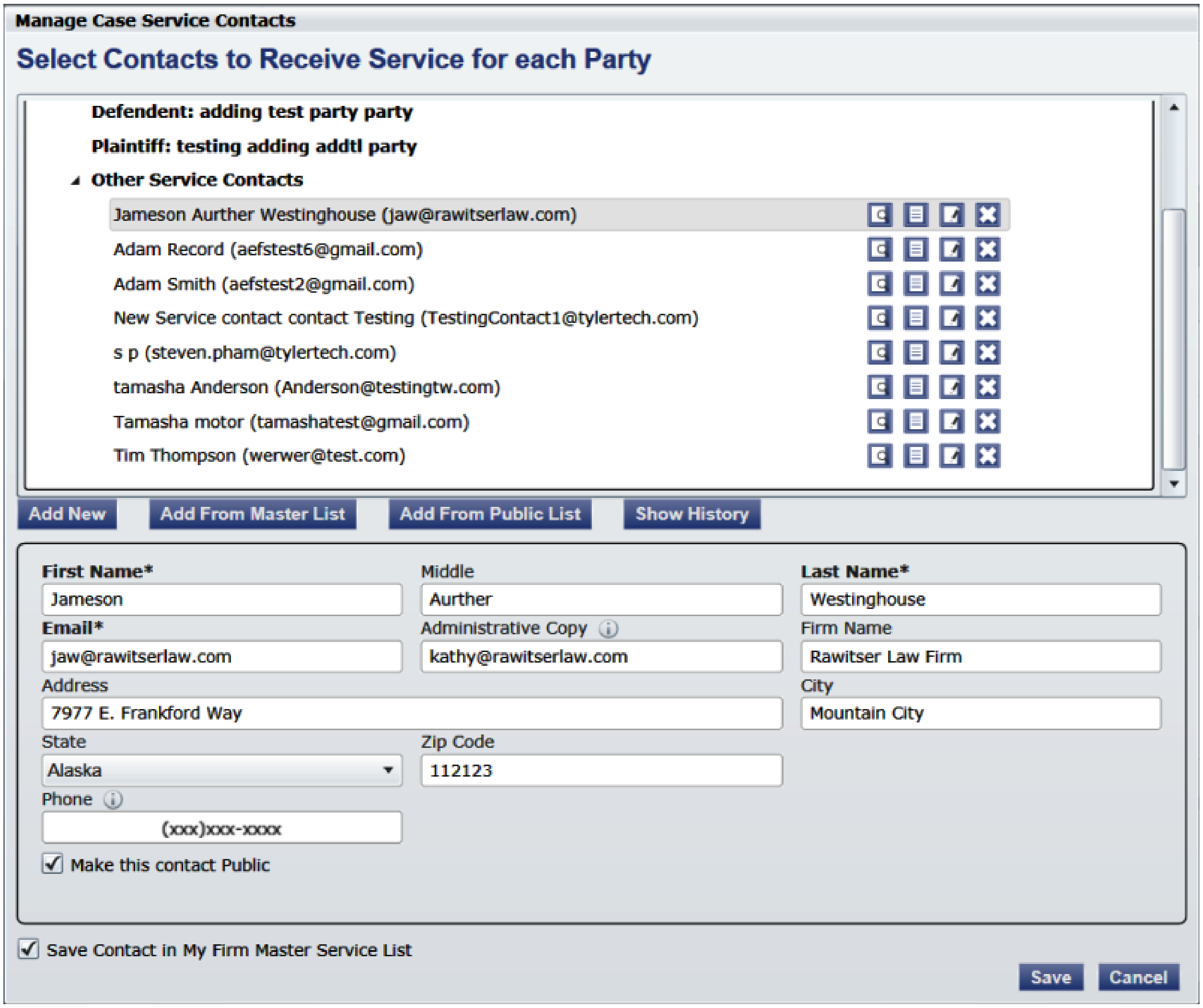


Figure 15.10 – Service Contacts Tab

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

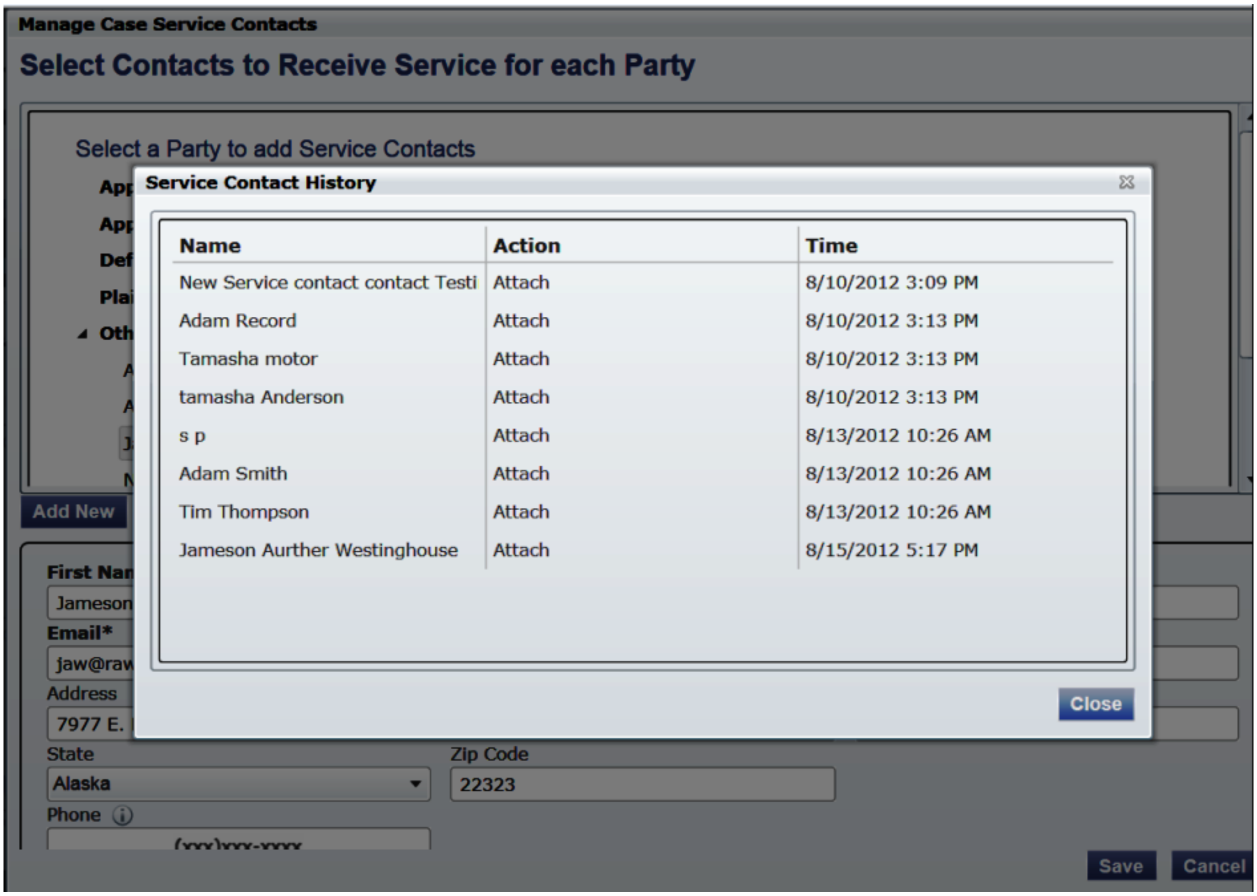


Figure 15.11 – View Service Contact History

6. Click the **Close** to close the window and return to the service contacts page.

Viewing the Service Contact Details

You can view the service contacts details of a contact in the **Service Contacts** list.

Perform the following steps to view the service contacts details of a contact in the **Service Contacts** list:

1. Click the SERVICE CONTACTS link at the top of the window.

   This action opens the **Service Contacts** page.

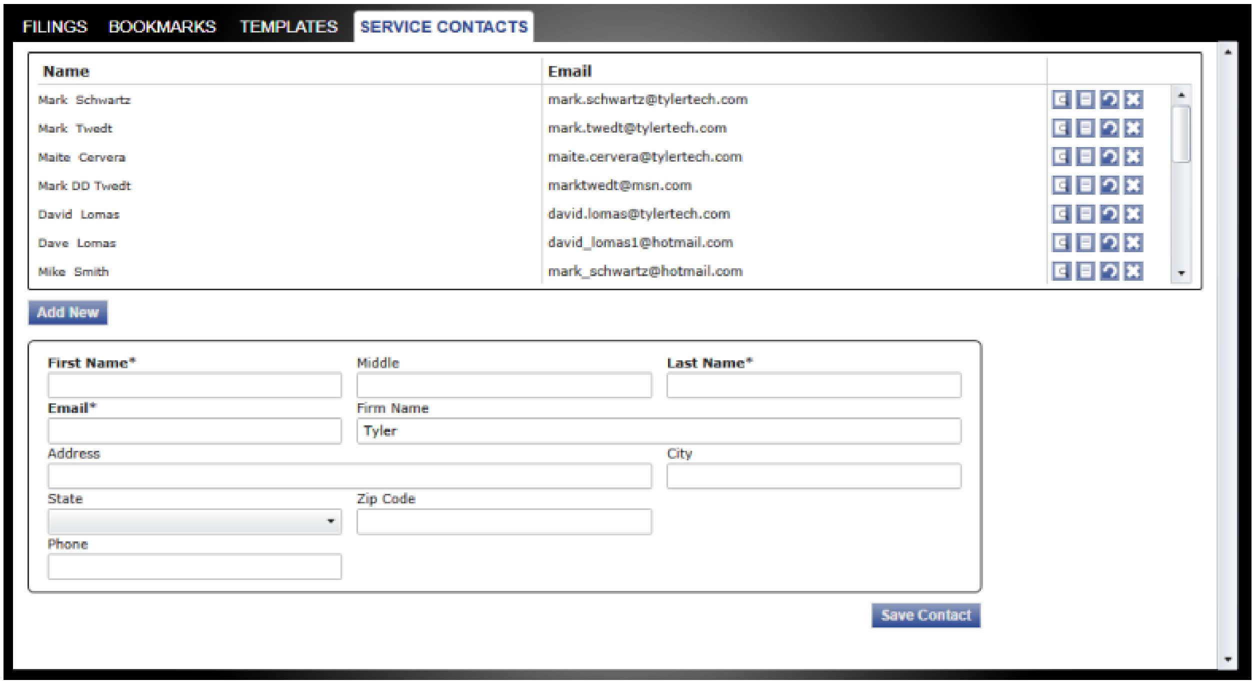


Figure 15.12 – Service Contacts Screen

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

Figure 15.13 – Service Contact Details Window

5. Click the Close button to return to the **Service Contacts** list.

Viewing the Attached Cases List

You can view the **Attached Case** list for the service contacts on the **Service Contacts** list.

Perform the following steps to view the **Attached Case** list for the service contacts on the **Service Contact** list:

1. Click the SERVICE CONTACTS link at the top of the window. This opens the **Service Contacts** page.

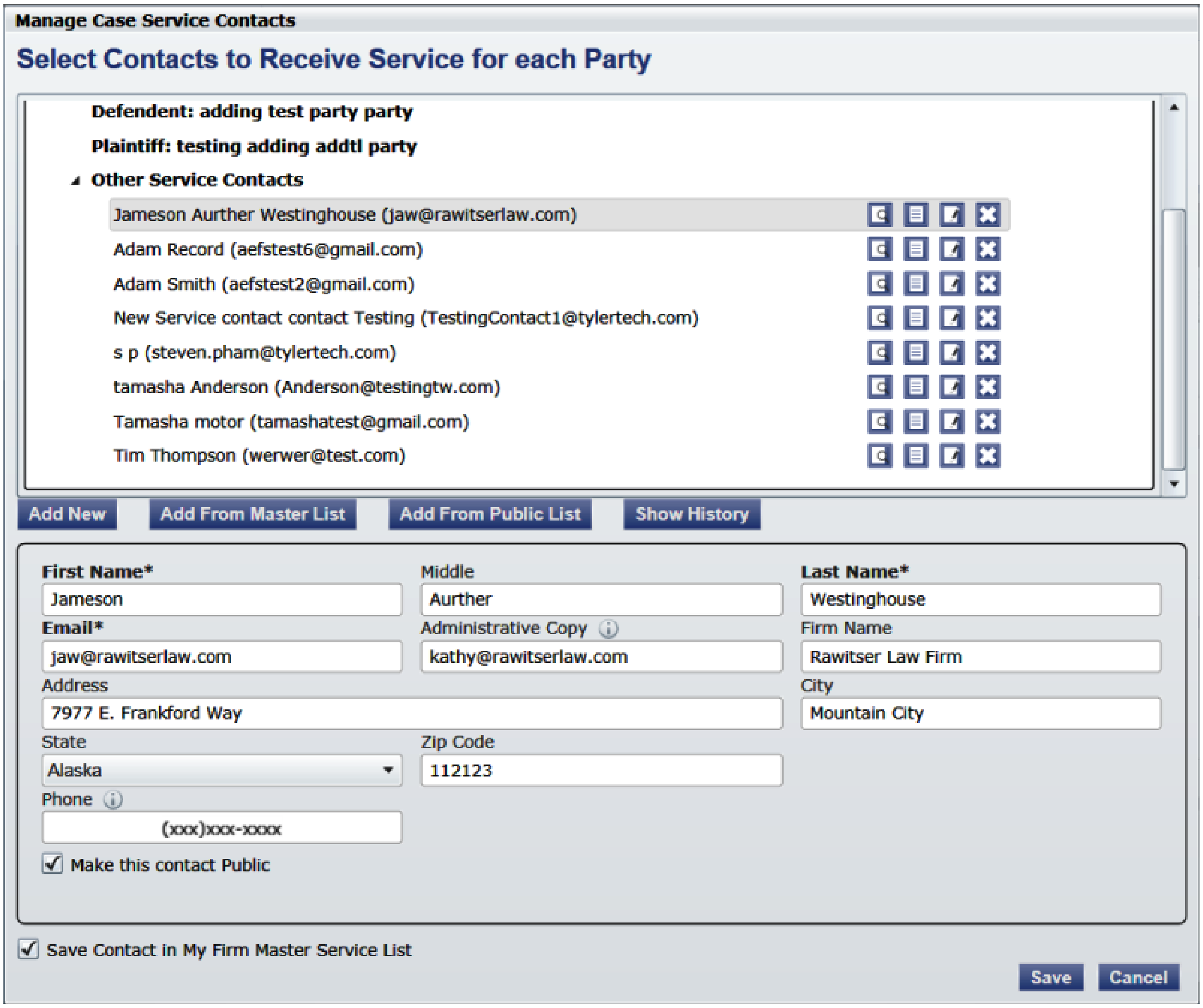


Figure 15.14 – Add New Firm Service Contact Form

2. Click the icon for that service contact.
3. The **Attached Cases** screen appears.
4. Click the Close button to return to the **Service Contacts** list.

Replacing Service Contacts on the Case

You can replace service contacts on case and in the **Service Contacts** list.

Perform the following steps to replace a service contacts on the **Service Contacts** list:

1. Click the SERVICE CONTACTS link at the top of the window. This opens the **Service Contacts** page.

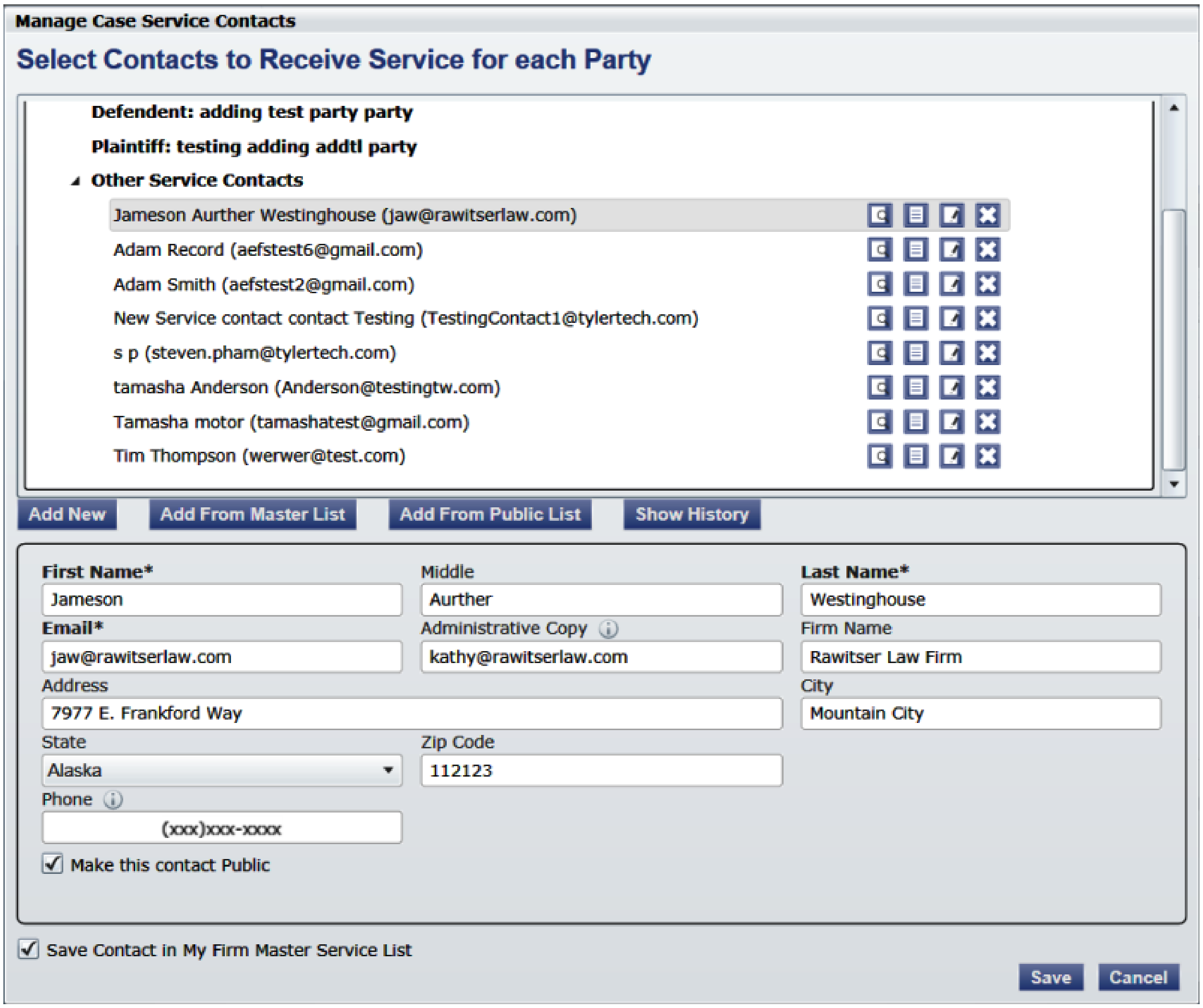


Figure 15.15 – Replacing Service Contacts Form

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

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

4. Click the Save Contact button to save the contact to the **Service Contacts** list.
5. The new contact information is displayed in the **Service Contact** list.

Deactivating a Service Contact on the Case

You can deactivate a service contacts on the case in the **Service Contacts** list.

Perform the following steps to deactivate a service contacts on the **Service Contacts** list:

1. Click the SERVICE CONTACTS link at the top of the window. This opens the **Service Contacts** page.

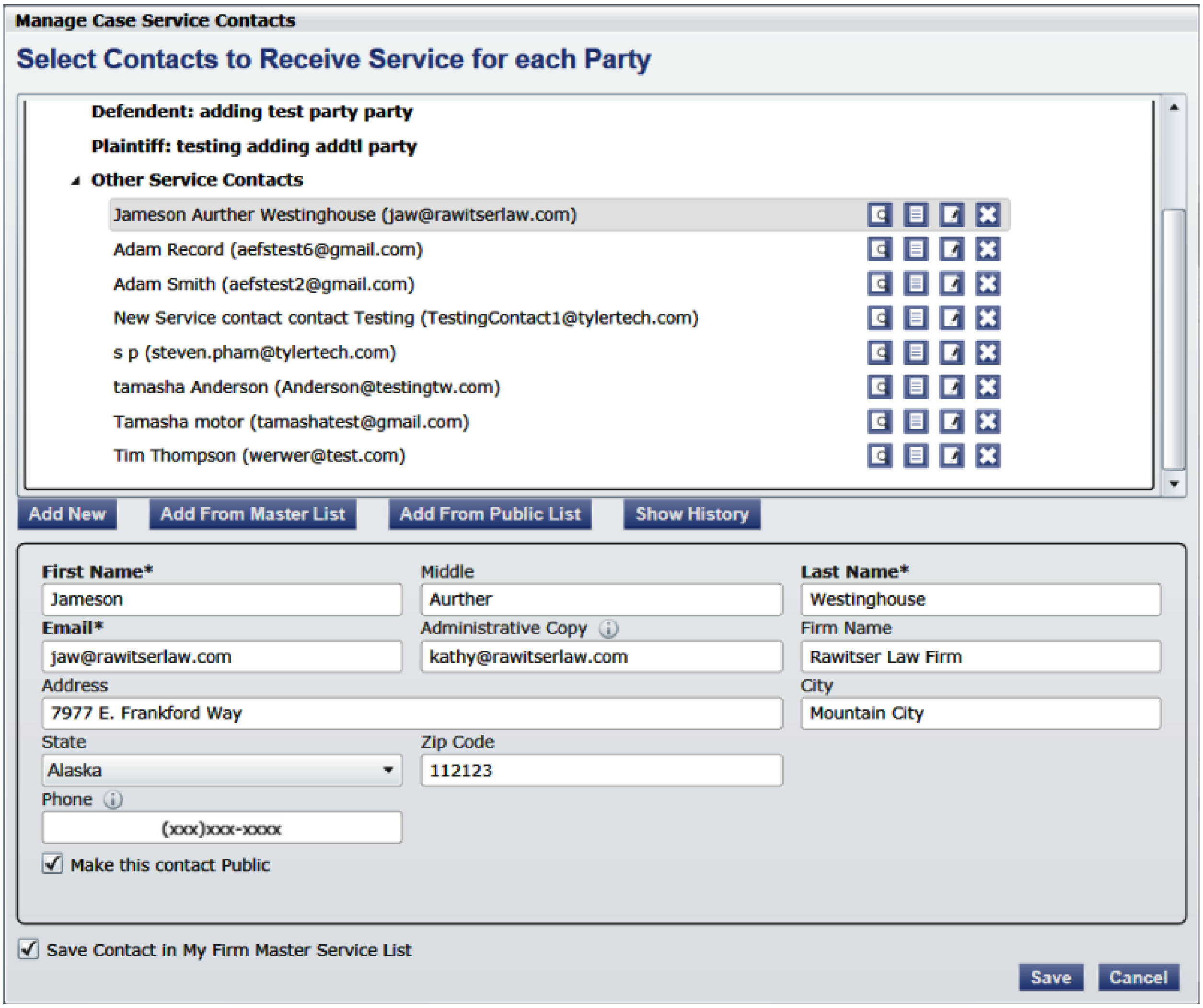


Figure 15.16 – Deactivating Service Contacts Form

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

Note: A notification is sent to service contacts being removed from the case. This also removes the administrator's e-mail attached to the contact.

Tyler Technologies Technical Support Contact Information

For assistance, contact Tyler Technologies through the following resources.

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