



# Odyssey File & Serve™

Individual Filer User Guide – Release 3.16

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# CHAPTER 1 SYSTEM OVERVIEW

## TOPICS COVERED IN THIS CHAPTER

- ◆ RELEASE 3.16 NEW FEATURES
- ◆ BEFORE YOU BEGIN

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.

## RELEASE 3.16 NEW FEATURES

The following is a new feature for Release 3.16.

### Add Ability to Collect Date of Birth for Parties

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

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

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

Figure 1.1 – Date of Birth Field on the Parties Page

## BEFORE YOU BEGIN

This guide is intended for individual filers (pro se/self-represented litigants).

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

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

## PREPARE YOUR CASE

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













To e-file successfully, complete the following:

- Ensure that all documents are completed and signed.
- Convert all documents you plan to e-file into the PDF format.
- 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 following table describes the different icons on the pages as you move around the application.

Icon	Description
	Deactivate the user, unbookmark the case, delete the party, delete a filing, delete a draft envelope, or 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.
	Cancel the filing.
	Copy the envelope or filing.
	Add a template to <b>My Favorites</b> folder.
	Edit a template in the workspace, or link a service contact to a case.
	View the attached case list.
	Replace service contacts.

## SYSTEM REQUIREMENTS

The recommended system requirements to successfully use the system are as follows.

- **Browser Requirements** – The system supports current versions of the Microsoft® Windows® operating system using the Internet Explorer® 9 or above application program. 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 1024 x 768 or better is highly recommended. If necessary, users can set their monitors to 800 x 600 pixels, but doing so may compromise the graphic display.
- **Document Format** – The Adobe® PDF format is the only format allowed for attaching documents in Odyssey File & Serve.

## 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 title of the next page illuminates to show where you are in the process.

**i 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 1.2 – Breadcrumb Navigation

### Populate the Data Table

The Data Table is populated using information that filers enter or select when they complete the forms throughout the filing process.

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

Figure 1.3 – Data Table


### Enter User Information

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

<b>First Name*</b> Amanda	<b>Middle</b> T.	<b>Last Name*</b> Watson
<b>Email*</b> awatson@ops.gov	<b>Administrative Copy</b> ⓘ info@yourfirm.com	<b>Firm Name</b> Madison-Green Law Firm
<b>Country*</b> United States of America		
<b>Address Line 1*</b> 998877 Legal Way		
<b>City*</b> Montgomery		
<b>State*</b> Vermont	<b>Zip Code*</b> 54433	
<b>Phone</b> 876-555-1212		
<input checked="" type="checkbox"/> Make this contact Public		

Figure 1.4 – 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 **WORKSPACE**, find your case on the *Filings* page, and click  to resume your filing.













FILINGS   BOOKMARKS   TEMPLATES   SERVICE CONTACTS							
My Firm	All Statuses	All Locations	From Date: <M/d/yyyy> 15	To Date: <M/d/yyyy> 15	Case or Envelope	Filter	Export
<b>Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )</b>						   	
Envelope # 4645 filed March 21, 2012 at 3:48 PM by Devon Estes on behalf of Beth Lewandowski							
Status	Filing Code	Filing Type	Filing Description	Reference Number			
Accepted	Judgment	EFileAndServe	Judg	EFS			
<b>Case # 27-ET-CV-12-12 - ( )</b>						   	
Envelope # 4643 filed March 21, 2012 at 2:39 PM by Devon Estes on behalf of Mark Schwartz							
Status	Filing Code	Filing Type	Filing Description	Reference Number			
Accepted	Affidavit and Order for Dismissal	EFile	Power of Atty	DJE: 1/1			
<b>Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )</b>						   	
Envelope # 4595 filed March 15, 2012 at 11:43 AM by Devon Estes on behalf of Mark Schwartz							
Status	Filing Code	Filing Type	Filing Description	Reference Number			
Rejected	Amended Petition	EFileAndServe	amended pet	1/3 EFS			
Rejected	Notice of Withdrawal of Counsel	EFile	notice of withdrawal of counsel	2/3 EFO			
1 of 5							

Figure 1.5 – Filings Page

## ERROR MESSAGES

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

### Password Reset Errors Scenarios

**Invalid User** – To reset the password for your account, you will need to provide the user name 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 (user name).

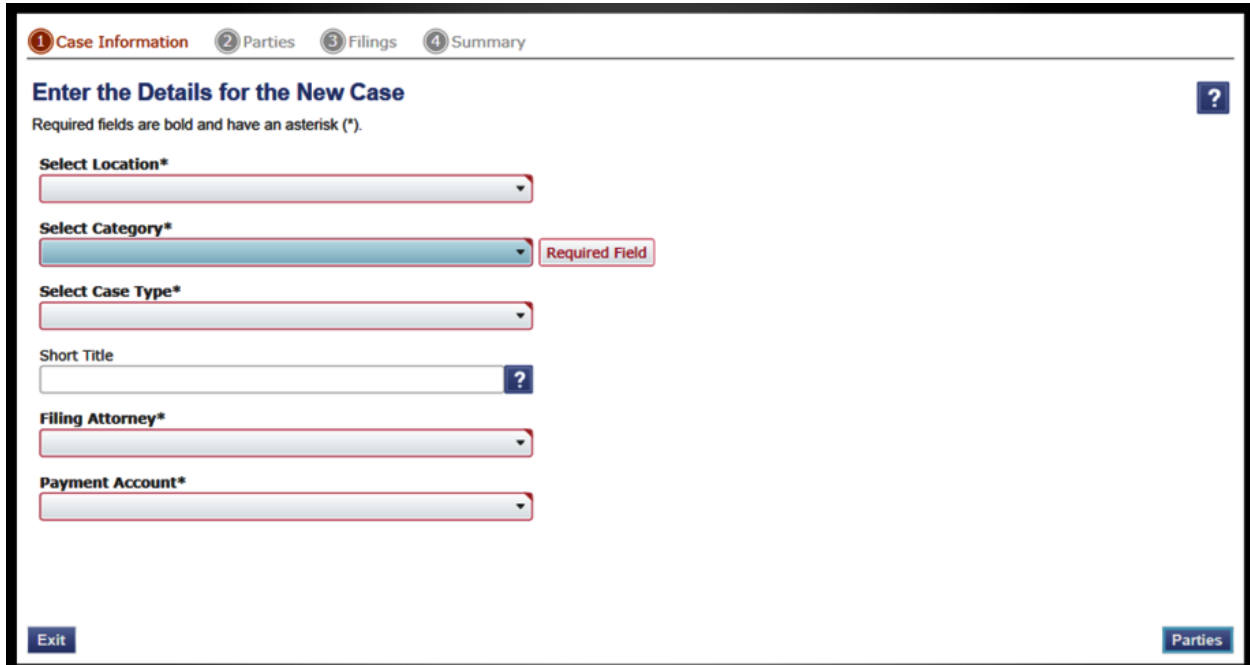
**i Note:** Reset your password.

## Enter Data in Required Fields

Required fields contain an asterisk (\*) next to the field name. If you do not enter information into required fields and try to advance, you will receive error messages.

**i Note:** Required fields may vary in different sections.

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



The screenshot shows a web form with a navigation bar at the top containing four tabs: 1 Case Information, 2 Parties, 3 Filings, and 4 Summary. The main heading is "Enter the Details for the New Case" with a help icon (question mark) to its right. Below the heading, a note states "Required fields are bold and have an asterisk (\*)." The form contains several fields: "Select Location\*" (dropdown menu), "Select Category\*" (dropdown menu with a red "Required Field" error message to its right), "Select Case Type\*" (dropdown menu), "Short Title" (text input with a help icon), "Filing Attorney\*" (dropdown menu), and "Payment Account\*" (dropdown menu). The "Select Location\*", "Select Case Type\*", "Filing Attorney\*", and "Payment Account\*" fields are outlined in red. At the bottom left is an "Exit" button and at the bottom right is a "Parties" button.

Figure 1.6 – Required Field Error Message

## Receive Error Messages

When an invalid error message is displayed, you must complete the required field to continue.

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



The screenshot shows a close-up of a "Zip\*" field. The field contains the text "654656" and is outlined in red. To the right of the field is a red button with the text "Invalid Zip Code".

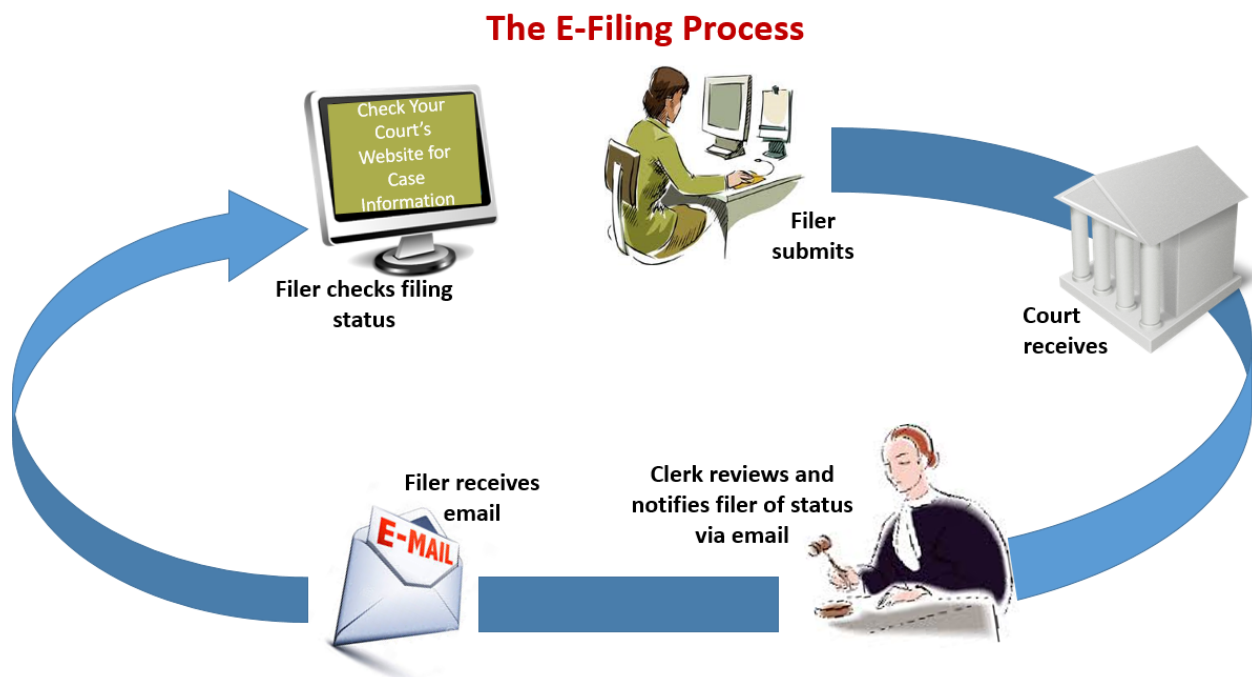
Figure 1.7 – Invalid Entry Error Message

# CHAPTER 2 E-FILING OVERVIEW

## TOPICS COVERED IN THIS CHAPTER

### ◆ FILING QUEUE STATUS

This section describes the e-filing process.



**Figure 2.1 – The E-Filing Process**

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

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

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

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

## FILING QUEUE STATUS

The filing queue status lets you know where you are in the e-filing process. The key represents the status listed for your filing.

The following filing status key table describes the status associated with each filing type.

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

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

---

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

# CHAPTER 3 FILE & SERVE HOME PAGE

The *Home* page serves as the gateway to the system. From this page, 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.

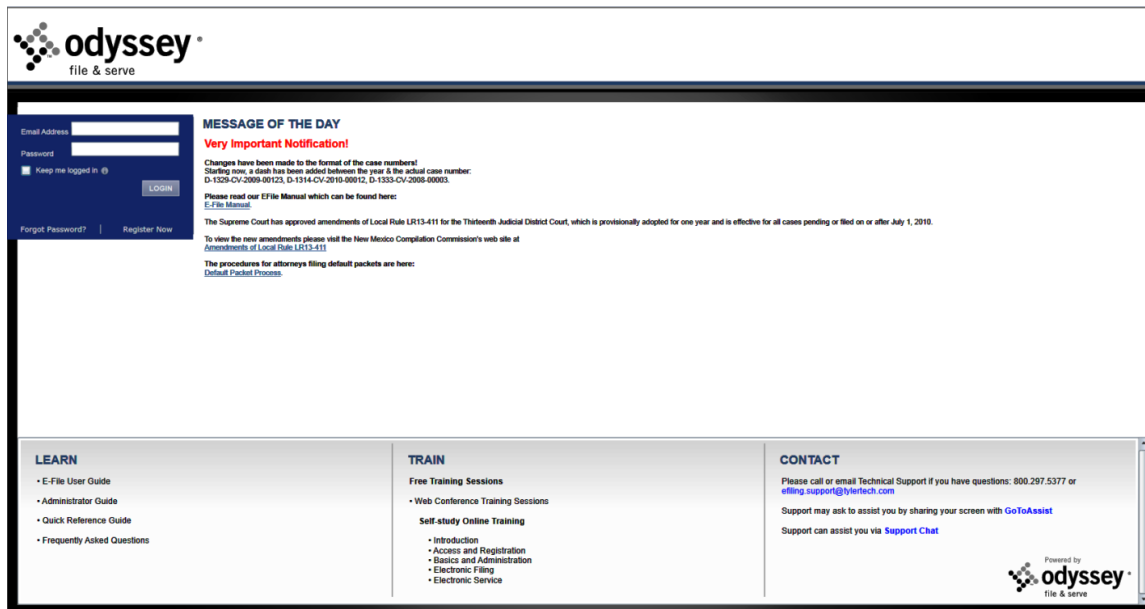


Figure 3.1 – File & Serve Home Page

## Message of the Day

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

## Login

The **Login** section allows you to log in and use the system. You can log in by entering your email address and password.

## Register Now

The **Register Now** link allows you to register using your 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 you to request that your password information be resent to you in case you have forgotten your password.

## Keep Me Logged In

The **Keep me logged in** check box allows you to remain logged in to the system for future access.

## Learn

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

- The *Individual Filer User Guide* provides step-by-step instructions on using the system. The user guide covers activities such as 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 passwords.
- The *Firm Administrator User Guide* is specifically for the Firm Administrator. This guide covers administrative functions such as registering the firm; managing users, payments, and attorney accounts; and 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 in to 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. Call the File & Serve Technical Support Team at 800-297-5377 Monday through Friday between the hours of 7:00 a.m. to 9:00 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an email to [efiling.support@tylertech.com](mailto:efiling.support@tylertech.com) or by using the [File & Serve Chat](#) option.

# CHAPTER 4 FILE & SERVE REGISTRATION

## TOPICS COVERED IN THIS CHAPTER

- ◆ REGISTERING AS AN INDEPENDENT USER
- ◆ RESETTING YOUR PASSWORD

## REGISTERING AS AN INDEPENDENT USER

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

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

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

1. Click **Register Now**.

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

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

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

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

12. Click **Register**.

The message **Your Registration is Complete** is displayed.

13. Click **Finish**.

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

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

# RESETTING YOUR PASSWORD

If you have forgotten your password, you can reset your password by entering the email address provided during registration and then clicking **Forgot Password?**.

**i Note:** Your password is case-sensitive. Ensure that the caps lock setting is not on.

**i Note:** You can unlock your account by using the **Forgot Password?** option and resetting your password if a security question is associated with the account.

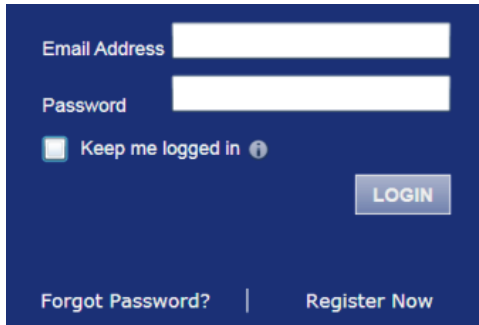


Figure 4.1 – Login Window

To reset your password, perform the following steps:

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

The *Reset Password* window is displayed.



Figure 4.2 – Reset Password – Email Address

2. Type the email address you provided during the registration process in the **Email Address** field.

**i 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 **Next** to continue.
4. Type your answer in the **Security Answer** field.
5. Click **Ok**, or click **Cancel** 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. Access your email inbox.
7. Locate the email from no-reply@tylerhost.net.
8. Click the link labeled **Click here** to reset your password.

You are prompted to choose a new password.

9. Type a new password in the **New Password** field.
10. Retype your new password in the **Repeat New Password** field.
11. Click **Change Password**.

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

# CHAPTER 5 LOGIN AND LOGOUT

## TOPICS COVERED IN THIS CHAPTER

- ◆ LOGGING IN
- ◆ LOGGING OUT

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 email 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.

To log in, perform the following steps:

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

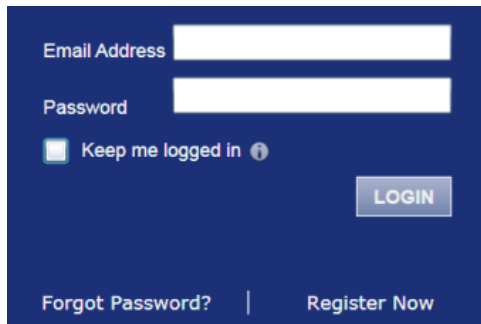
The image shows a dark blue login form. At the top, there are two white input fields: the first is labeled "Email Address" and the second is labeled "Password". Below the password field is a checkbox labeled "Keep me logged in" with an information icon to its right. To the right of the checkbox is a light blue button labeled "LOGIN". At the bottom of the form, there are two links: "Forgot Password?" and "Register Now", separated by a vertical line.

Figure 5.1 – Login Window

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

**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 if a security question is associated with the account.

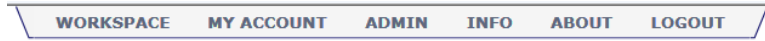
Once you have successfully logged in, you can begin to e-file and e-serve.

## LOGGING OUT

This section describes how to properly log out.

To log out, perform the following steps:

1. Click **LOGOUT** to automatically log out.



**Figure 5.2 – Logout Link**

2. Return to the *Home* page to log in to the system.

# CHAPTER 6 WORKSPACE

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

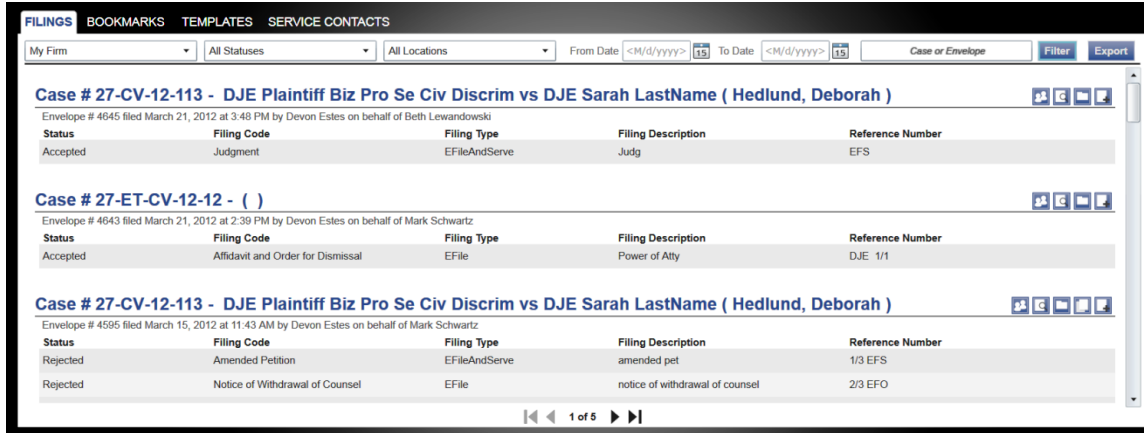


Figure 6.1 – Filings Page

## Workspace

You can access the workspace after you have successfully logged in. Click [WORKSPACE](#). The *Filings* page is displayed.

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

You can use the workspace to perform the following tasks:

### New Case

Click **NEW CASE** to file a new case.

### Case Search

To search for a case, select a location from the drop-down menu, and then type a case number in the **Case Number** field. Next, click **Go**. You can also search for a case by using the **Advanced Search** option.



Figure 6.2 – Case Search Options

## Filings

You can use the *Filings* page to 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.
- Add service contacts to a case.
- View the envelope details.
- Copy the envelope.
- Resume the filing process.

## Bookmarks

The *Bookmarks* page displays a list of case numbers and descriptions for the cases you have bookmarked. Only you can see this information.

You can use the *Bookmarks* page to perform the following tasks:

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

## Service Contacts

You can use the *Service Contacts* page to perform the following tasks:

- Add service contacts to a case.
- View service contact details.
- View the attached cases list.
- Replace service contacts on the case.
- Deactivate a service contact.

# CHAPTER 7 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.

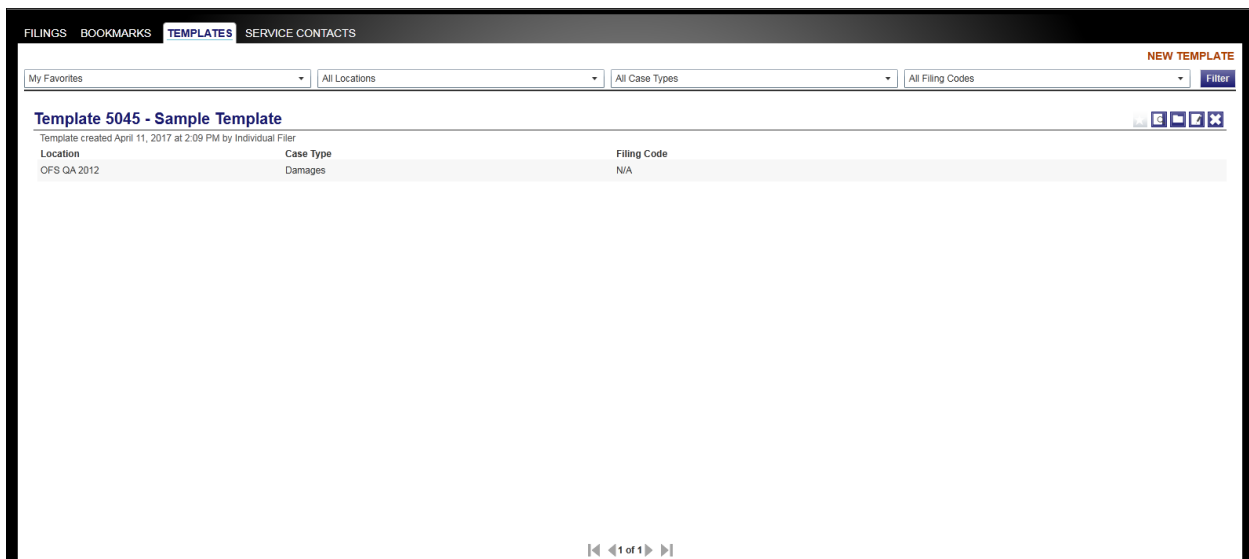


Figure 7.1 – Templates Page

On the *Templates* page, filers can create, manage, and use a filing template that was recently created.

When creating a new filing using a template, you can modify the information as needed for the particular filing. The modification does not affect the original template.

On the *Templates* page, 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 the **My Favorites** folder, select **My Favorites** from the drop-down list, and then click **Filter**.
- To select a location, use the drop-down list to filter by location, and then click **Filter**.
- To select a case type, use the drop-down list to filter by case types, and then click **Filter**.
- To select a filing code, use the drop-down list to filter by filing codes, and then click **Filter**.

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

To create a template, perform the following steps:

1. Click **WORKSPACE**.

The *Filings* page is displayed.

2. Click **Templates**.

The *Templates* page is displayed.

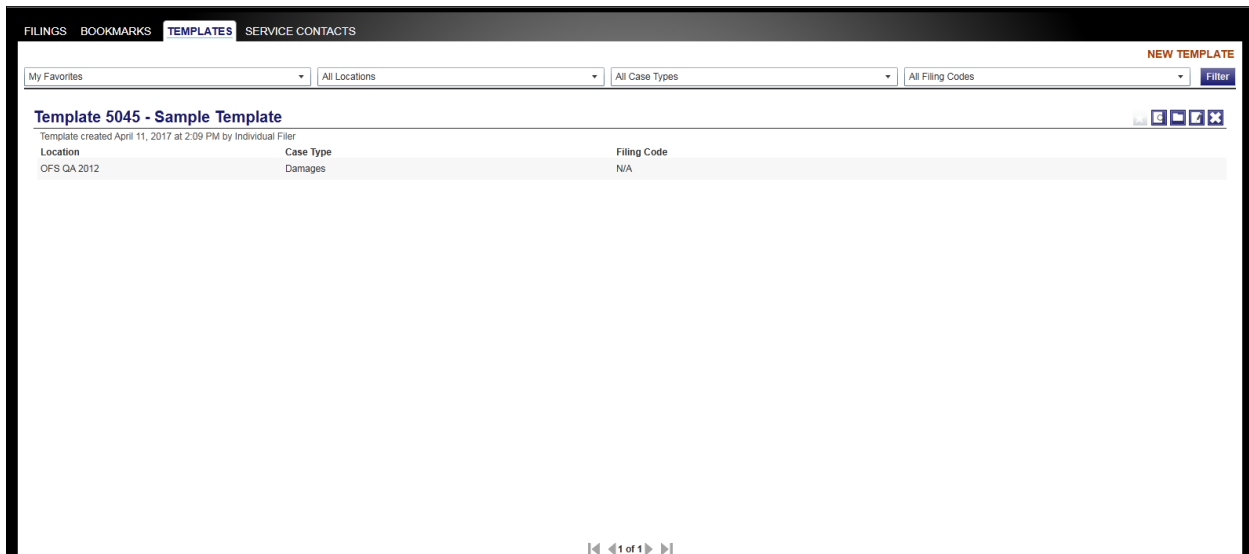


Figure 7.2 – Templates Page

3. Click **NEW TEMPLATE**.

The *Case Information* page is displayed.

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

**Note:** An asterisk indicates required fields.

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

5. Select the **Add as Favorite** check box to save the template to your favorites.
6. Click **Parties** to save the case information and continue.
7. Enter the details for the parties involved in the case.
8. Click **ADD PARTY** to add a new party to the case.
9. Complete the **Add Party** form.
10. Repeat step 9 to add another party to the case.
11. Click **Filings** to save and continue.
12. Enter the filing details for the case.
13. Click **Service** to save and continue.
14. Select the contacts to receive service for this envelope.
15. Click **Summary** to save and view a summary of the case.
16. Click **Complete Template** to submit the filing.

## EDITING A TEMPLATE

Users can edit templates that have been created.

To edit a template, perform the following steps:

1. Click **Templates**.

The *Templates* page is displayed.

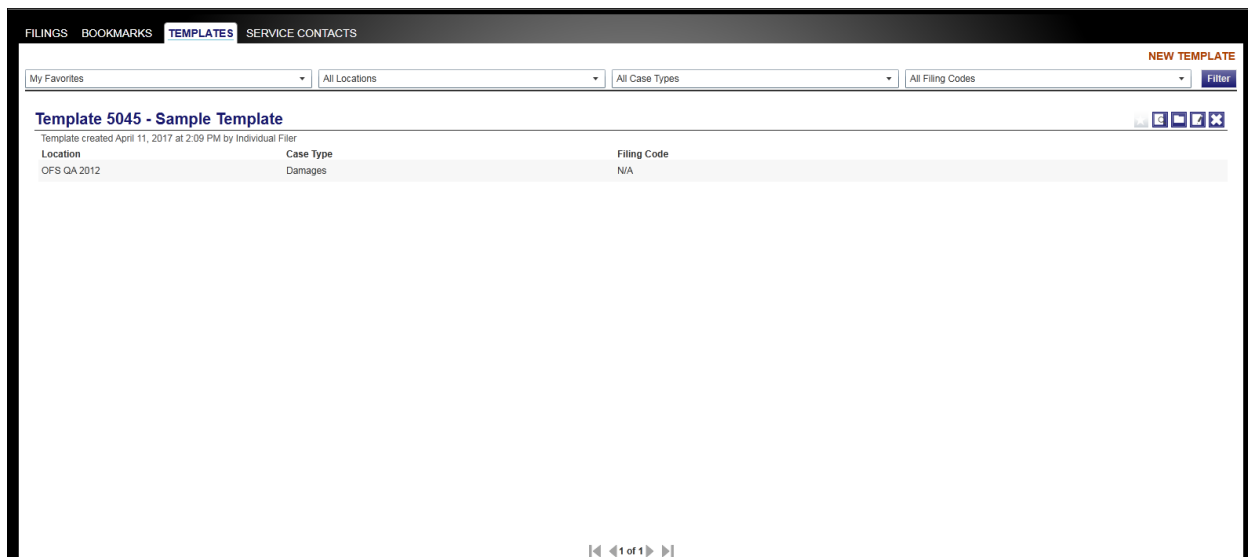



Figure 7.3 – Templates Page

2. Select the template that you want to edit from the list.

3. Click the Edit Template () icon.
4. Edit the pages of the template as needed.
5. Click **Complete Template** to save the template.

## DELETING A TEMPLATE

Users can delete templates that were previously created.

To delete a template, perform the following steps:

1. Click **Templates**.

The *Templates* page is displayed.

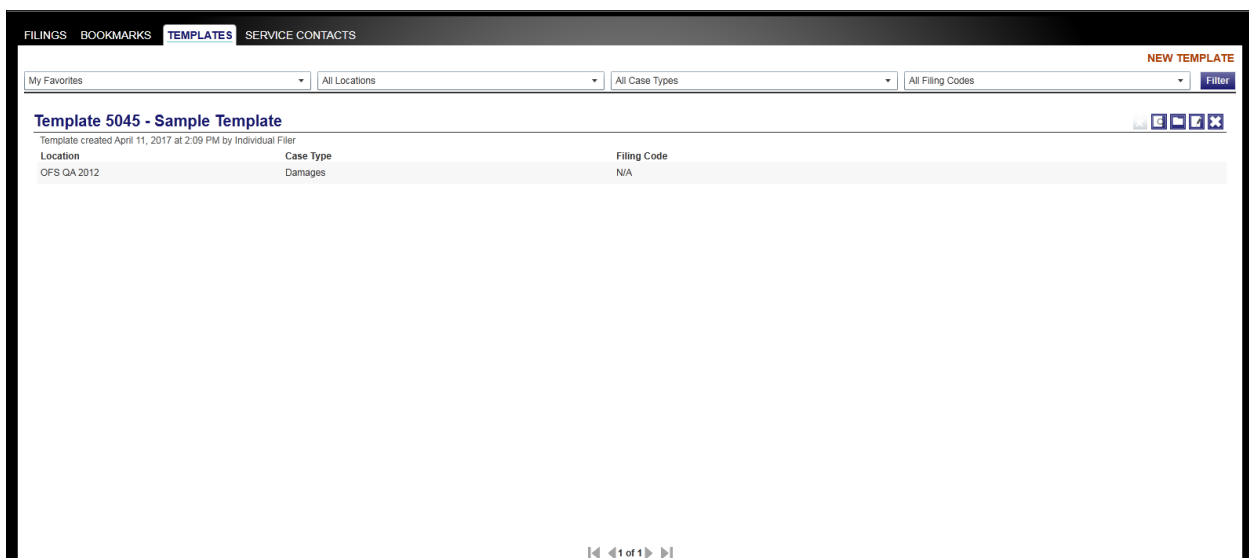


Figure 7.4 – Templates Page

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

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

# CHAPTER 8 CASE INITIATION

## TOPICS COVERED IN THIS CHAPTER

- ◆ FILING A NEW CASE
- ◆ ENTERING PARTY DETAILS
- ◆ ENTERING FILING DETAILS
- ◆ SELECTING CONTACTS TO RECEIVE SERVICE
- ◆ VIEWING THE CASE SUMMARY

You can initiate a case by clicking **NEW CASE**.



Figure 8.1 – New Case Link

Click **NEW CASE** to open the *Case Information* page and to begin the case initiation process for e-filing.

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

## FILING A NEW CASE

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

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

To file a new case, perform the following steps:

1. Click **NEW CASE**.



Figure 8.2 – New Case Link

The *Case Information* page opens.

Envelope 32471 OFS QA 2014 - Appellate Case

1 Case Information 2 Parties 3 Filings 4 Service Contacts 5 Summary

### Enter the Details for the New Case

Required fields are bold and have an asterisk (\*).

**Select Location\***  
OFS QA 2014

**Select Category\***  
Appellate

**Select Case Type\***  
Appellate Case

**Lower Court Case Number\***  
111111

Lower Court Case Description  
Petition for Reivew

**Lower Court Name\***  
Johnson County

Lower Court Case Judge  
Judge Ray Parker

Filer Type  
AutoReview

**Payment Account\***  
Waiver

Exit Parties

Figure 8.3 – Case Information Page

- Complete the details for the new case form by using the drop-down lists.

**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 are required to file an appeal.

- Click **Parties** to save the case information and continue.

**Note:** Once you click **Parties**, 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 **WORKSPACE**, find your case on the **Filings** page, and click **▶**.

# ENTERING PARTY DETAILS

Each case requires a party type.

Figure 8.4 – Parties Page

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

1. Click **Parties** on the *Case Information* page.
  2. Select the  I am this party check box to indicate you are the party.
  3. Choose the party type by selecting either **Plaintiff** or **Defendant** under the **Party Type** column. You can also select the party type from the **Party Type** drop-down list.
  4. Select the appropriate check box for either **Person** or **Business**.
  5. Select the attorney from the **Lead Attorney** drop-down list.
  6. Click **Close** to close the page.
  7. Type the party name in the fields provided.
- Note:** An asterisk (\*) indicates a required field.
8. Type the party's date of birth in the **Date of Birth** field, or select the date using the calendar.
  9. Select the country from the **Country** drop-down list.

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

- The following applies when the country listed is Canada:
  - The **State** field is displayed as **Province**.
  - If provinces are configured, then the **Province** field consists of a drop-down list of Canadian codes; otherwise, the **Province** field consists of a free-form text box.
  - The **City** field is displayed as **Municipality**.

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

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

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

Envelope 35489 Case CC-15-230 OFS QA 2013 - Court at Law 2 - Appeal

1 Parties 2 Filings 3 Summary

**Enter the Details for the Parties Involved in this Case**

Required fields are bold and have an asterisk (\*).

Party Type	Name	Attorney
Defendant	Jane Defendant	Pro Se
Plaintiff	John Plaintiff	

**ADD PARTY** 1612 additional parties excluded due to system constraints.

**Party Type:** Defendant **Attorney:** Pro Se

**Party Name:** Jane Defendant

Exit Filings

Figure 8.5 – Sample of Parties Page for Cases with More Than 100 Parties

11. Select the service method from the **Service Method** drop-down list.

The system no longer allows the selection of mail service for service contacts with non-U.S. addresses.

Service Method

Mail

EServe

Mail

Mail service not available for non-US addresses.

Figure 8.6 – Service Method

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

# ENTERING FILING DETAILS

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

Figure 8.7 – Filing Details Page

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

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

**Note:** A reference number is a 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, as follows:
- Click *Click to Browse* to select and upload a lead document.

This action opens Windows Explorer on your computer.

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

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

- Click  to attach the file.

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

Documents


<b>Lead Document*</b> ⓘ	3.14_DrawDownAccountBalance_Release...	
	Document file name is too long. Max length is 40 characters.	
Description	Security	
<input type="text" value="Brief w/ Docket Service"/>	<input type="text" value="Confidential (T)"/>	
<b>Attachments</b> ⓘ	<i>Click to Browse</i>	

Figure 8.8 – Document File Name Error

- Wait as the attachment uploads.

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

- Type a description of the uploaded attachment in the **Description** field.
- Select a security option for the attachment.

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

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

This action opens Windows Explorer on your computer.

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

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

**Note:** 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 by using the RTF document format.

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

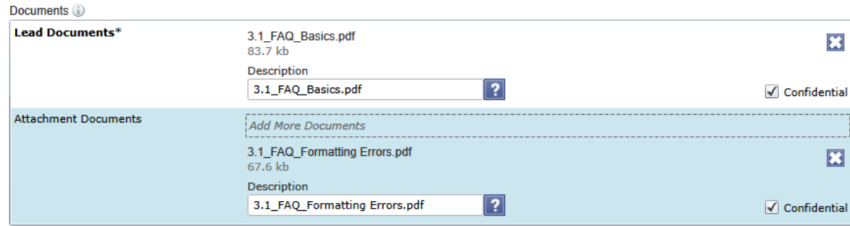







Figure 8.9 – Uploading an Attachment

- c. Click  to attach the file.
  - d. Wait as the attachment uploads.
  - e. Click  to delete the uploaded attachment.
  - f. Type a description of the uploaded attachment.
  - g. Select a security option for the attachment.
10. Type the filing comments for the court reviewer to read in the **Filing Comments** field.
  11. In the **Courtesy Copies** field, type the email addresses of the parties to receive courtesy copies of this filing.
  12. In the **Preliminary Copies** field, type the email addresses of the parties to receive preliminary copies of this filing.
  13. Click  to select a due date.
  14. Review the filing fees.
 

**Note:** Your credit card is authorized when it is submitted; however, the transaction fees will not post to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.
  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. Click  to save the filing details when you are done, or click  to return to the previous page.

## CALCULATING MULTIPLE FEES

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



The screenshot shows a dialog box titled "Fee Multipliers". The main area contains a text box with the text "Civil - COPIES CERTIFIED - Enter a Quantity" and a smaller input field containing the number "10". At the bottom of the dialog, there are two buttons: "Cancel" and "Ok".

Figure 8.10 – Fee Calculation Table

To calculate multiple fees, perform the following steps:

1. From the drop-down list, select a filing code with a listed optional service.
2. Enter the number of services or copies needed.
3. Click **Ok** to calculate the multiple fees and return to the *Filings* page.

# SELECTING CONTACTS TO RECEIVE SERVICE

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

Figure 8.11 – Service Contacts Page

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

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

The fields required to add a service contact are displayed.

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

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

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

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

5. Select the **Make this contact Public** check box to make the contact public.
6. Select the **Save Contact in My Firm Master Service List** check box to save the contact to the firm's master service list.
7. Click **Save** to save the contact.
8. Select the check boxes next to the service contact names that you want to receive service.
9. Click **Summary** to save the selected contact and view the case summary, or click **Filings** to return to the previous page.

## VIEWING THE CASE SUMMARY

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

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

To view the case summary, perform the following steps:

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

The screenshot displays the 'Envelope and Filing Summary' page. The main content area is divided into several sections:

- Case Information:** Location: 3rd District (Non-Integrated), Case Category: Family - FAM, Case Type: Abuse & Neglect, Filing Attorney: Test Firm/Attorney, Payment Account: Test Waiver.
- Parties:** A table listing parties with columns for Party Type, Name, Address, Phone, and Attorney. Parties include 'In the Matter of Child', 'Petitioner', 'Respondent', and '3rd Party Defendant'.
- Filings:** A table with columns for Filing Code, Filing Description, Reference Number, and Filing Type. It includes 'ADDITIONAL VOLUME' and 'Lead Document'.
- Service Contacts:** A list of contacts with checkboxes for selection, including 'In the Matter of Child', 'Service Contact Four', 'Petitioner', 'Respondent', 'Attorney', and '3rd Party Defendant'.
- Parties with no contacts for eService:** A list of parties without service contacts.
- Fees:** A table showing 'ADDITIONAL VOLUME' fees: Filing Fee (\$0.00), E-File Fee (\$0.00), and Court Transaction Fee (\$0.00). Total for this filing is \$0.00. The 'Envelope Total' is \$0.00.
- Payment:** Fields for 'Payment Account\*' (Test Waiver), 'Filer Type' (Default), and 'Party Responsible for Fees\*' (Jackson J. Jones).
- Filing Attorney:** 'Filing Attorney\*' (Test Firm/Attorney).

Figure 8.12 – Envelope and Filing Summary Page

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

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

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

# CHAPTER 9 CASE SEARCH

## TOPICS COVERED IN THIS CHAPTER

- ◆ SEARCHING FOR A CASE
- ◆ ADVANCED SEARCH
- ◆ PERFORMING AN ADVANCED SEARCH BY PERSON
- ◆ PERFORMING AN ADVANCED SEARCH BY BUSINESS

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

## SEARCHING FOR A CASE

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



Figure 9.1 – Case Search Option

To search for a case, perform the following steps:

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

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

3. Click **Go**.

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



Figure 9.2 – Case Search Results

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

## ADVANCED SEARCH

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

## PERFORMING AN ADVANCED SEARCH BY PERSON

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

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

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

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

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

The *Advanced Search* dialog box opens.

Figure 9.3 – 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 listed in the case management system, so a check box is not required.

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

The search results are displayed.

## PERFORMING AN ADVANCED SEARCH BY BUSINESS

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

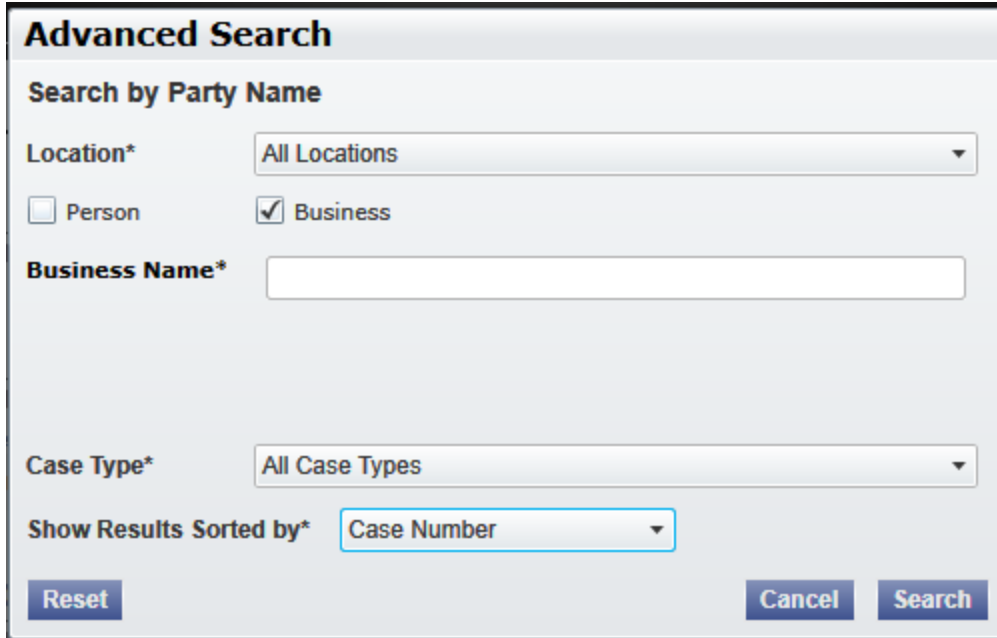
**Note:** An asterisk (\*) indicates a required field.

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

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

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

The *Advanced Search* dialog box opens.



The image shows a software dialog box titled "Advanced Search". It has a light gray background and a dark gray header. Below the header, the text "Search by Party Name" is displayed. There are several input fields: a dropdown menu for "Location\*" set to "All Locations", two checkboxes for "Person" (unchecked) and "Business" (checked), a text input field for "Business Name\*", a dropdown menu for "Case Type\*" set to "All Case Types", and a dropdown menu for "Show Results Sorted by\*" set to "Case Number". At the bottom, there are three buttons: "Reset", "Cancel", and "Search".

Figure 9.4 – 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 listed in the case management system, so a check box is not required.

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

The search results are displayed.

# CHAPTER 10 SUBSEQUENT FILING

## TOPICS COVERED IN THIS CHAPTER

- ◆ FILING INTO AN EXISTING CASE
- ◆ FILING INTO A CASE THROUGH CASE SEARCH
- ◆ FILING INTO A CASE NOT LISTED

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.

**i Note:** The system does not allow subsequent filing into cases that have not been accepted by the court.

To access your case to begin a subsequent filing, perform the following steps:

1. Click **WORKSPACE**.

The *Filings* page is displayed.

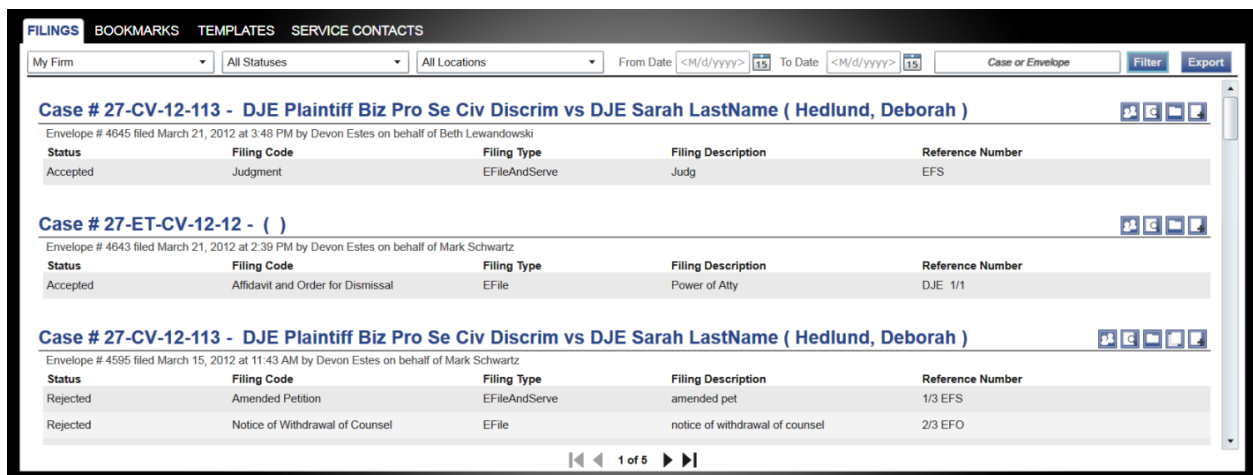




Figure 10.1 – Filings Page

2. Locate your case on the *Filings* page.
3. Click  to file into the case.
4. Enter the details for the parties involved in the case.

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

5. Click  to save your entries and continue.
6. Enter the filing details for the case.

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

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

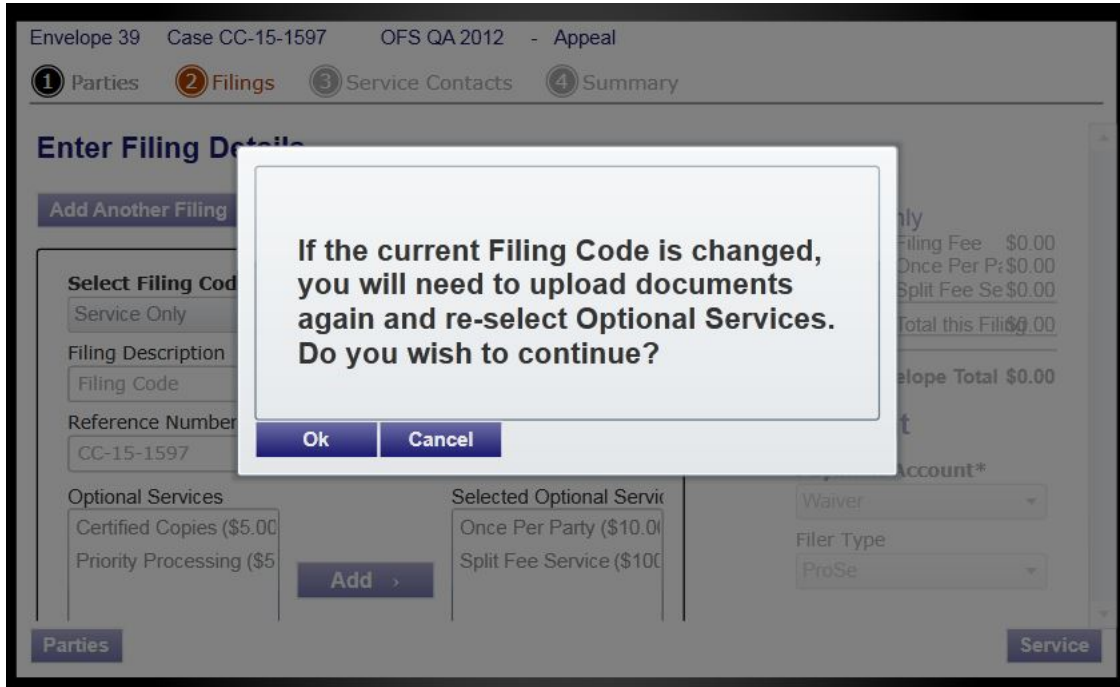


Figure 10.2 – Filing Code Error Message

7. Click **Service** to save your entries and continue.
8. Select the contacts to receive service for this envelope.
9. Click **Summary** to save your entries and view a summary of the case.
10. Click **Submit** to submit the filing.


# FILING 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 10.3 – Case Search Results**

To file into a case found in the search results, perform the following steps:

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

The system displays the search results.

4. Locate the case that 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 filing process begins.

## FILING INTO A CASE NOT LISTED

Filers can submit subsequent filings for cases that are not yet indexed in locations that use a non-bidirectional case management system integration. This feature allows 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.

NEW CASE
3rd District (Non-Integrated) ▾
12345
?
Go
Advanced Search

**Searching for: 12345**  
**As: Case Number**

Case Num	Location	Description	Case Typ	Actions
12345	3rd District (Non-Integrated)		Administrativ	
12345	3rd District (Non-Integrated)		Administrativ	

File Into Case Not Listed

**Figure 10.4 – Case Search Results**

To file into a case not listed in the search results, perform the following steps:

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

The system displays an error message stating that the case was not found.

4. Click **File Into Case Not Listed**.

# CHAPTER 11 MY ACCOUNT

## TOPICS COVERED IN THIS CHAPTER

- ◆ CHANGING THE USER PASSWORD
- ◆ CHANGING THE SECURITY QUESTION
- ◆ ADDING PAYMENT ACCOUNTS
- ◆ UPDATING USER INFORMATION
- ◆ MANAGING EMAIL NOTIFICATIONS

Click **My Account** to access the *Change Password*, *Payment Accounts*, *My Information*, and *Manage Notifications* pages.

You can change your password and your security question on the *Change Password* page.

You can add or update a payment account on the *Payment Accounts* page.

You can update your user and contact information on the *My Information* page.

You can manage the email notifications that you want to receive on the *Manage Notifications* page.

## CHANGING THE USER PASSWORD

You can change your password on the *Change Password* page.

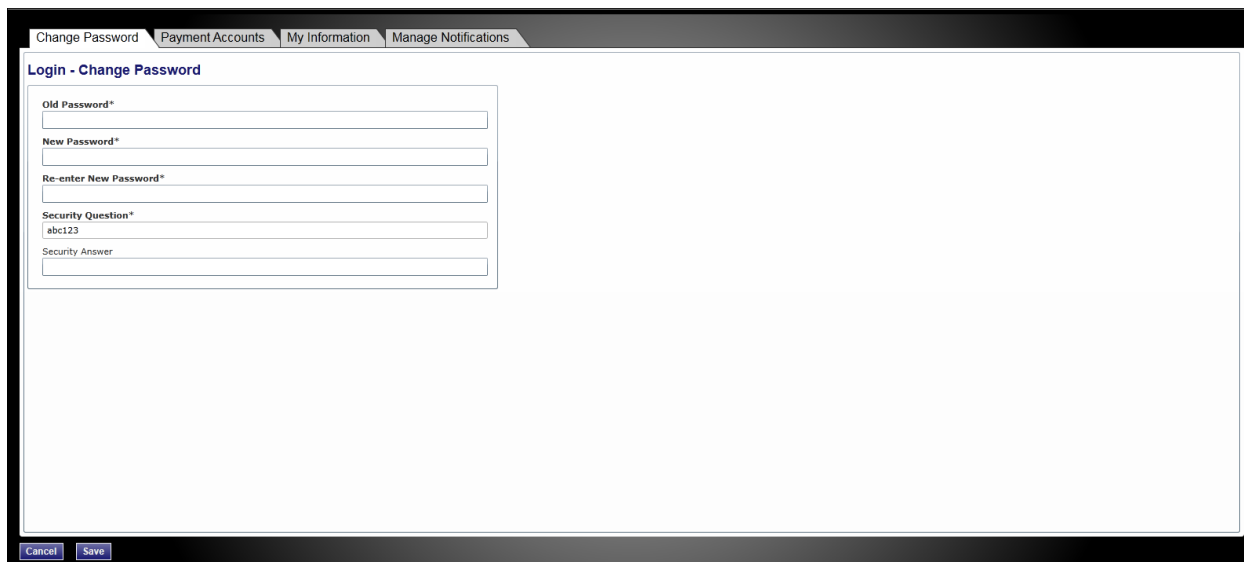


Figure 11.1 – Change Password Page

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

To change the user password, perform the following steps:

1. Click **MY ACCOUNT**.

The *Change Password* page is displayed.

2. Complete the required fields.

**Note:** You can unlock your account by using the *Forgot Password?* option.

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

## CHANGING THE SECURITY QUESTION

You can change your security question on the *Change Password* page.

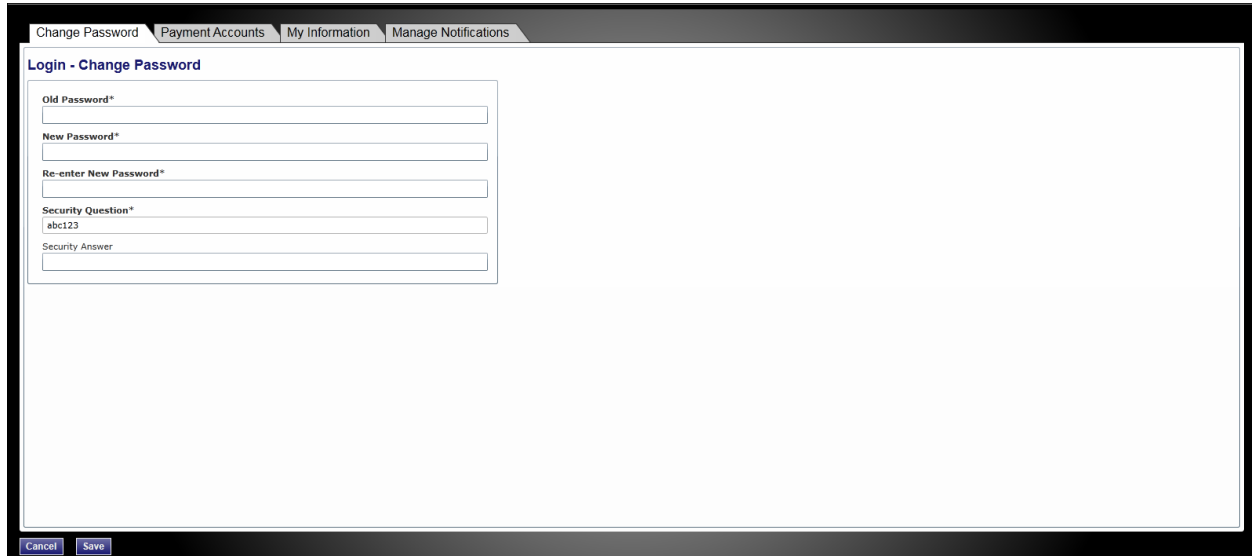
The screenshot shows a web browser window with a navigation bar at the top containing tabs for 'Change Password', 'Payment Accounts', 'My Information', and 'Manage Notifications'. The main content area is titled 'Login - Change Password' and contains a form with the following fields: 'Old Password\*', 'New Password\*', 'Re-enter New Password\*', 'Security Question\*' (with 'abc123' entered), and 'Security Answer'. At the bottom of the form are 'Cancel' and 'Save' buttons.

Figure 11.2 – Security Question Field on the Change Password Page

To change the security question, perform the following steps:

1. Click **MY ACCOUNT**.  
The *Change Password* page is displayed.
2. Change your security question and answer by typing your new information in the **Security Question** and **Security Answer** fields.
3. Click **Save** to change your security question, or click **Cancel** to cancel the action.

## ADDING PAYMENT ACCOUNTS

The system requires all users to have a payment account.

To add a payment account, perform the following steps:

1. Click **MY ACCOUNT**.  
The *Login – Change Password* page is displayed.
2. Click **Payment Accounts**.  
The *Payment Accounts* page is displayed.

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

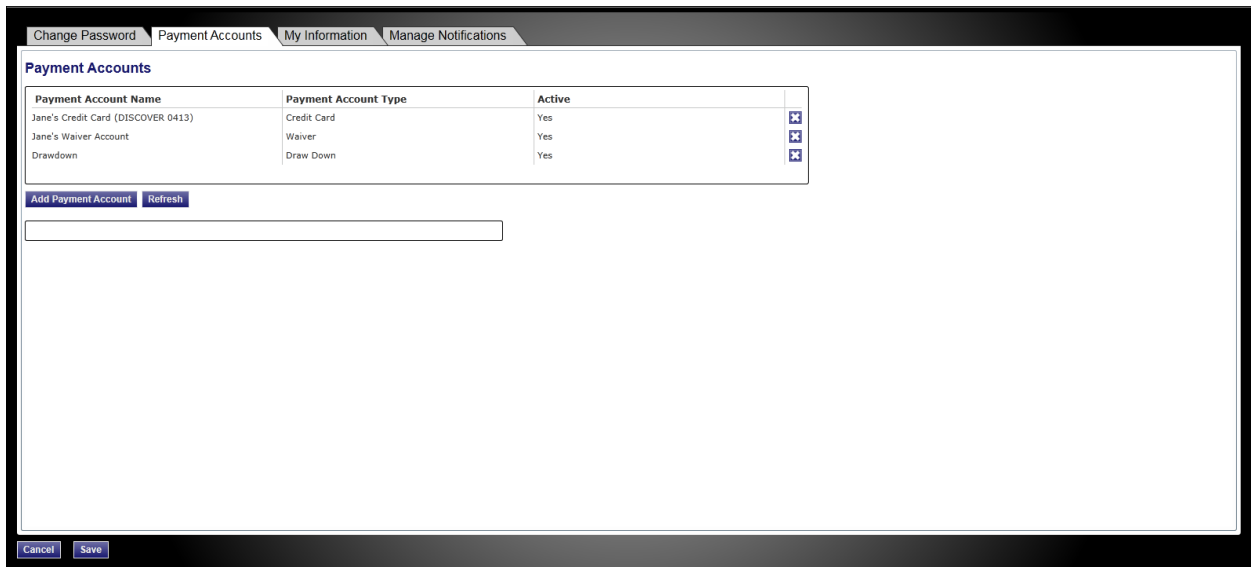


Figure 11.3 – Payment Accounts Page

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



Figure 11.4 – Payment Account Type Drop-Down List

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

**Payment Account Name\***

**Payment Account Type\***

Active

Available at all locations

Figure 11.5 – Payment Account Fields

- Select **Credit Card** if the payment account is a credit card. Click **Enter Credit Card Information** to enter the credit card information. **Note:** The system may redirect 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.

- Select **Draw Down** if the payment account is a draw-down account. Click **Enter Draw Down Information** to select a draw-down account. The **Draw Down** selection window is displayed.

Figure 11.6 – Draw Down Selection Window

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

- Select **Waiver** if the payment account is a waiver. **Note:** The  **Active** check box is displayed when you select the **Waiver** payment account type.
6. Select the  **Active** check box to activate the payment account.
  7. Select the  **Available at all locations** check box to make the selected payment type available at all locations associated with the payment account.
  8. Click **Save Changes** to save the changes and continue, or click **Cancel** to cancel any changes made.

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

## UPDATING USER INFORMATION

Users can update their personal information.

To update your personal information, perform the following steps:

1. Click **MY ACCOUNT**.  
The *Login – Change Password* page is displayed.
2. Click **My Information**.  
The *My Information* page is displayed.

The screenshot shows a web interface with a navigation bar at the top containing 'Change Password', 'Payment Accounts', 'My Information', and 'Manage Notifications'. The 'My Information' tab is active. Below the navigation bar, there are two main sections: 'My User Information' and 'Contact Information'. The 'My User Information' section contains three input fields: 'First Name\*' (with 'Individual' entered), 'Middle' (empty), and 'Last Name\*' (with 'Filer' entered). Below these is an 'Email Address\*' field containing 'IndividualFiler@tylertech.com'. The 'Contact Information' section includes a 'Country\*' dropdown menu set to 'United States of America', an 'Address Line 1\*' field with '5101 Tennyson Pkwy', an empty 'Address Line 2' field, a 'City\*' field with 'Plano', a 'State\*' dropdown menu set to 'Texas', a 'Zip Code\*' field with '75024', and a 'Phone Number\*' field with '123 123 1234'. At the bottom left of the form area are 'Cancel' and 'Save' buttons.

Figure 11.7 – My Information Page

3. Update any information as needed.
4. Click **Save** to save your changes, or click **Cancel** to cancel the action.

## MANAGING EMAIL NOTIFICATIONS

You can manage the email notifications that you want to receive from the system.

The screenshot shows a web interface with a navigation bar at the top containing 'Change Password', 'Payment Accounts', 'My Information', and 'Manage Notifications'. The 'Manage Notifications' tab is active. Below the navigation bar, the section is titled 'Email Notifications:' and includes the instruction 'Select the email notifications that you wish to receive.' Below this instruction is a list of six notification types, each with a checked checkbox: 'Filing Accepted', 'Filing Rejected', 'Filing Submitted', 'Service Undeliverable', 'Filing Submission Failed', and 'Filing Received'. At the bottom left of the form area are 'Cancel' and 'Save' buttons.

Figure 11.8 – Manage Notifications Page

To manage your email notifications, perform the following steps:

1. Click **MY ACCOUNT**.  
The *Change Password* page is displayed.

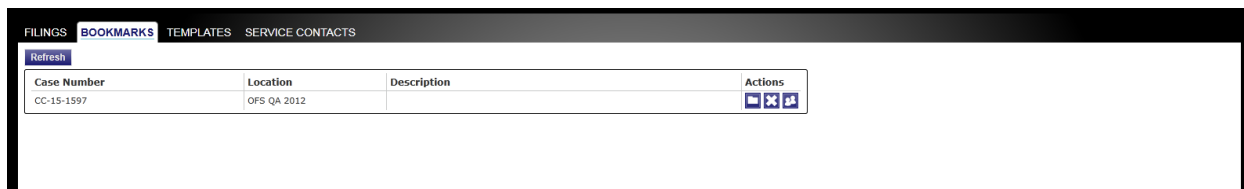
2. Click **Manage Notifications**.

The *Manage Notifications* page is displayed.

3. Select the check boxes for the notifications that you want to receive, or clear the check boxes for the notifications that you do not want to receive.
4. Click **Save** to save your selection, or click **Cancel** to cancel the action.

# CHAPTER 12 BOOKMARKS

The *Bookmarks* page displays a list of case numbers and descriptions for the cases you have bookmarked. Only you can see this information.






Case Number	Location	Description	Actions
CC-15-1597	OFS QA 2012		  

Figure 12.1 – Bookmarks Page

You can perform several functions on the *Bookmarks* page.

## 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* page.

## Refresh the Bookmarked Cases List

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


## Filter the Bookmarked Case List

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


## File Into an Existing Case

Click  in the **Actions** column on the *Bookmarks* page when you are filing into an existing case.

## Remove a Case from the Bookmarked List

You can remove a case from the bookmarked case list by clicking  in the **Actions** column on the *Bookmarks* page.

## Add Service Contact to the Case

You can add service contacts to a selected case by clicking  in the **Actions** column on the *Bookmarks* page.

# CHAPTER 13 FILINGS

## TOPICS COVERED IN THIS CHAPTER

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

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

## View Filings

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

Click **WORKSPACE**. The *Filings* page is displayed.

Use the *Filings* page to perform many of the tasks associated with e-filing. You can use the *Filings* page to manage your 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.

The screenshot shows the 'FILINGS' page with a navigation bar at the top containing 'FILINGS', 'BOOKMARKS', 'TEMPLATES', and 'SERVICE CONTACTS'. Below the navigation bar are filters for 'My Firm', 'All Statuses', 'All Locations', 'From Date', 'To Date', and 'Case or Envelope'. The main content area displays three case listings. Each listing includes a title, a brief description, and a table of filings.

Status	Filing Code	Filing Type	Filing Description	Reference Number
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Stipulation	EFile	Stipulation	civil test file set up

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3
Rejected	Petition for Review of Decision of Court of Appe	EFileAndServe	DJE Petition for Review of Decision of Court of.	Filing 2/3

Figure 13.1 – Filings Page

## FILTERING THE FILINGS QUEUE

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

**Note:** Only you can see this information.

To filter the Filings queue, perform the following steps:

- 1. Click **Filings**.

All relevant information is displayed concerning your filings.

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

**Note:** For the From Date or the To Date, click  to select dates from a calendar, or type the dates manually (for example, type 1/25/2017).



Figure 13.2 – Select the Dates from the Calendar

- 3. Click  to filter the search.

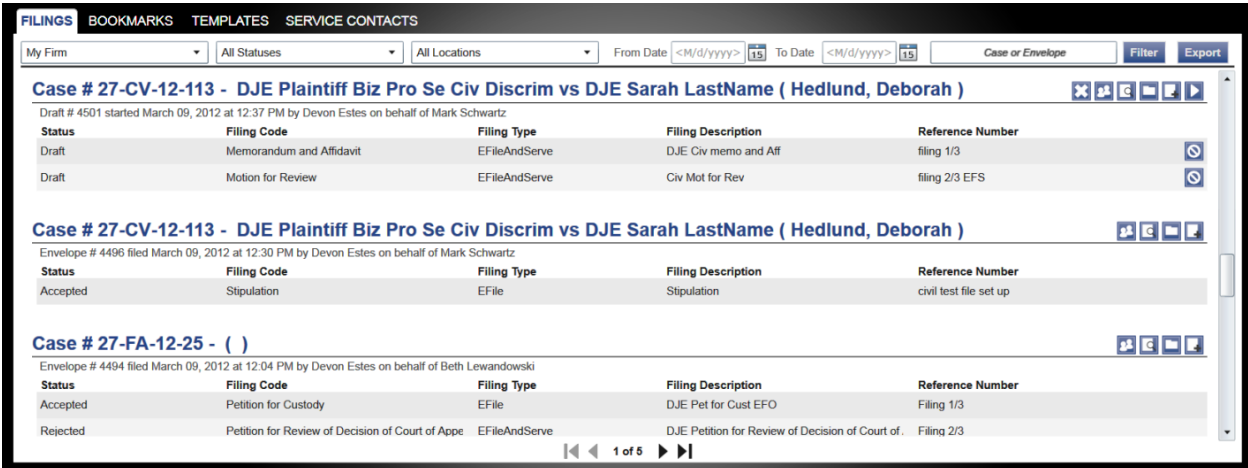


Figure 13.3 – Filings Page

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

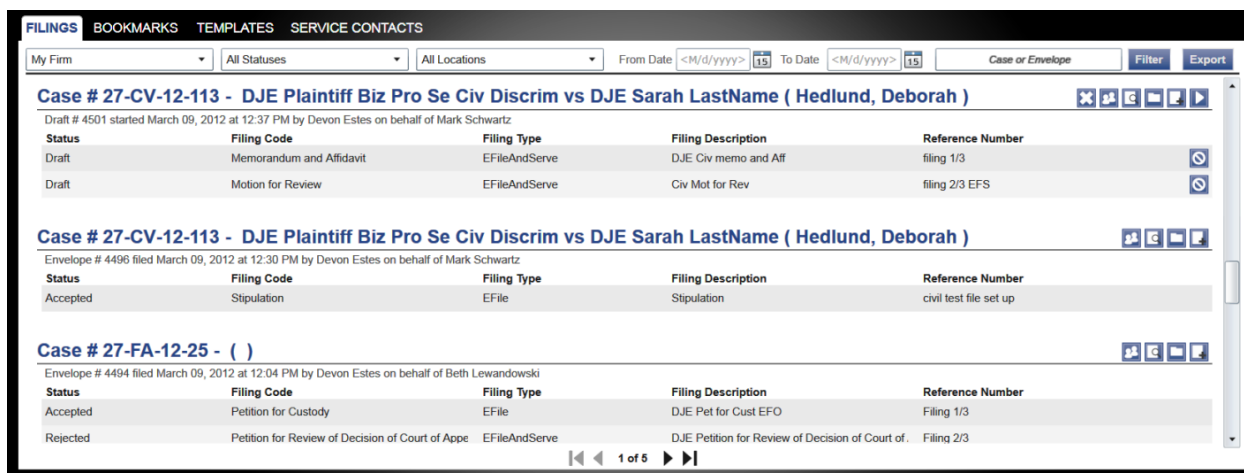


Figure 13.4 – Filings Page

To export a copy of your filings to your computer, perform the following steps:

1. Click **Filings**.
2. Click **Export**.

The Internet Explorer® window is displayed. From here, you can export your filings to a Microsoft Office® XML file.

3. Type a file name in the **File name** field provided.



Figure 13.5 – File Name Field

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

The files are saved on your computer.

## VIEW 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 (Microsoft Windows® or macOS® operating system software) and programs installed on your computer, your options 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 you open the XML file, 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 contains multiple rows of data for envelopes created with multiple filings. Currently, the export file 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 a way to link the client file in your office back to the filings created and is used for internal purposes only. When you are e-filing a document and using the Reference Number in this manner, the Reference Number will assist in the reconciliation of charges to client files.

## COPYING THE ENVELOPE

If your filing has been rejected, you can copy an envelope to create a new envelope to resubmit to the courts. Use the Copy icon () on the *Filings* page.

**i Note: The copied envelope should only be used to resubmit the filing for the same case as the copied envelope.**

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

To copy the envelope, perform the following steps:


1. Click **Filings**.

The *Filings* page is displayed.

The screenshot shows the 'FILINGS' page with a navigation bar at the top containing 'FILINGS', 'BOOKMARKS', 'TEMPLATES', and 'SERVICE CONTACTS'. Below the navigation bar are search filters for 'My Firm', 'All Statuses', 'All Locations', 'From Date', and 'To Date'. The main content area displays three case entries:

- Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**: Draft # 4501 started March 09, 2012 at 12:37 PM by Devon Estes on behalf of Mark Schwartz. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Rows include Draft (Memorandum and Affidavit), Draft (Motion for Review).
- Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**: Envelope # 4496 filed March 09, 2012 at 12:30 PM by Devon Estes on behalf of Mark Schwartz. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Row includes Accepted (Stipulation).
- Case # 27-FA-12-25 - ( )**: Envelope # 4494 filed March 09, 2012 at 12:04 PM by Devon Estes on behalf of Beth Lewandowski. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Rows include Accepted (Petition for Custody) and Rejected (Petition for Review of Decision of Court of Appe).

Figure 13.6 – Filings Page

2. Click a case on the *Filings* page to copy.
3. Click  for the selected case to copy the envelope.

## VIEWING THE ENVELOPE DETAILS

You can use the *Filings* page to view the information entered for the envelope, the filing details, and the documents submitted.

To view the envelope details, perform the following steps:


1. Click **WORKSPACE**.

The *Filings* page is displayed.

The screenshot shows the 'FILINGS' page with a navigation bar at the top containing 'FILINGS', 'BOOKMARKS', 'TEMPLATES', and 'SERVICE CONTACTS'. Below the navigation bar are search filters for 'My Firm', 'All Statuses', 'All Locations', 'From Date', and 'To Date'. The main content area displays three case entries:

- Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**: Envelope # 4645 filed March 21, 2012 at 3:48 PM by Devon Estes on behalf of Beth Lewandowski. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Row includes Accepted (Judgment).
- Case # 27-ET-CV-12-12 - ( )**: Envelope # 4643 filed March 21, 2012 at 2:39 PM by Devon Estes on behalf of Mark Schwartz. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Row includes Accepted (Affidavit and Order for Dismissal).
- Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**: Envelope # 4595 filed March 15, 2012 at 11:43 AM by Devon Estes on behalf of Mark Schwartz. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Rows include Rejected (Amended Petition) and Rejected (Notice of Withdrawal of Counsel).

Figure 13.7 – Filings Page

2. Locate your case on the *Filings* page.
3. Click  for the details of the envelope that you want to view.

The *Envelope Details* window opens. 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.

**Envelope Details**

**Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedl**

**Case Information**

Location	Hennepin Civil
Date Filed	
Case Number	27-CV-12-113
Case Description	DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName
Assigned to Judge	Hedlund, Deborah
Attorney	Mark Schwartz
Firm Name	Tyler
Filed By	Tyler TechTest

**Fees**

Convenience Fee	\$0.00
Total Court Case Fees	\$0.00
Total Court Filing Fees	\$0.00
Total Filing & Service Fee	\$0.00
Grand Total	\$0.00

**Payment**

Account Name	Waive Account
Transaction Amount	\$0.00
Transaction Response	
Transaction ID	
Order ID	

**Service Only**

Filing Type	Serve
Filing Code	Service Only
Filing Description	Civil Discrimination Henn
Reference Number	DJE Civil Service Waiver
Comments	no fees
Courtesy Copies	
Status	Draft

**Fees**

Court Fee	\$0.00
-----------	--------

Print Preview Close

Figure 13.8 – Envelope Details Window

**Note:** If the Service check box was selected during the filing process, the type of service is displayed.

**Note:** A filer can review the error message in the Document Error Information section on the *Details* page when a Service Only filing submission fails.

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

**Note:** The system 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	<a href="#">[Original]</a>
---------------	-----------------	----------------------------

Figure 13.9 – Print Preview Page

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

The *Filings* page is displayed.

## RESUMING THE FILING PROCESS

You can resume the filing after you have logged out of the system or exited the filing process. Click **Filings** to access the *Filings* page. From here, you can access your case and resume the filing.

The screenshot shows the 'FILINGS' page with a navigation bar at the top containing 'FILINGS', 'BOOKMARKS', 'TEMPLATES', and 'SERVICE CONTACTS'. Below the navigation bar are filters for 'My Firm', 'All Statuses', 'All Locations', 'From Date', 'To Date', and 'Case or Envelope'. The main content area displays three case entries:

- Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**: Draft # 4501 started March 09, 2012 at 12:37 PM by Devon Estes on behalf of Mark Schwartz. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Rows include 'Draft Memorandum and Affidavit' and 'Draft Motion for Review'.
- Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**: Envelope # 4496 filed March 09, 2012 at 12:30 PM by Devon Estes on behalf of Mark Schwartz. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Row includes 'Accepted Stipulation'.
- Case # 27-FA-12-25 - ( )**: Envelope # 4494 filed March 09, 2012 at 12:04 PM by Devon Estes on behalf of Beth Lewandowski. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Rows include 'Accepted Petition for Custody' and 'Rejected Petition for Review of Decision of Court of Appe'.

Figure 13.10 – Filings Page

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

1. Click **Filings**.
2. Click a case or an envelope on the *Filings* page for which you want to resume a filing.

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



Figure 13.11 – Cannot Resume Envelope Message

3. Click  for the selected case to resume the filing process.

The last-saved pages in your envelope or case open so that you can continue the filing process.

# CANCELING A FILING

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

The screenshot shows the 'FILINGS' page with a navigation bar at the top containing 'FILINGS', 'BOOKMARKS', 'TEMPLATES', and 'SERVICE CONTACTS'. Below the navigation bar are search filters for 'My Firm', 'All Statuses', 'All Locations', 'From Date', 'To Date', and 'Case or Envelope'. The main content area displays three case entries, each with a table of filing details.

Status	Filing Code	Filing Type	Filing Description	Reference Number
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aif	filing 1/3
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS


Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Stipulation	EFile	Stipulation	civil test file set up

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3
Rejected	Petition for Review of Decision of Court of Appe	EFileAndServe	DJE Petition for Review of Decision of Court of.	Filing 2/3

Figure 13.12 – Filings Page

To cancel a filing, perform the following steps:

1. Click **Filings**.
2. Click a case or an envelope on the *Filings* page that you want to cancel.
3. Click  for the selected case to cancel the filing.

# CHAPTER 14 SERVICE CONTACTS

## TOPICS COVERED IN THIS CHAPTER

- ◆ ADDING SERVICE CONTACTS TO A CASE
- ◆ ADDING SERVICE CONTACTS FROM A MASTER LIST
- ◆ ADDING SERVICE CONTACTS FROM A PUBLIC LIST
- ◆ VIEWING SERVICE CONTACTS HISTORY
- ◆ VIEWING THE SERVICE CONTACT DETAILS
- ◆ VIEWING THE ATTACHED CASE LIST
- ◆ REPLACING SERVICE CONTACTS ON THE CASE
- ◆ REMOVING SERVICE CONTACTS FROM A MASTER LIST
- ◆ REMOVING SERVICE CONTACTS FROM A PUBLIC LIST
- ◆ DEACTIVATING A SERVICE CONTACT

## ADDING SERVICE CONTACTS TO A CASE

You can add service contacts to a case.

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

1. Click **WORKSPACE**.

The *Filings* page is displayed.

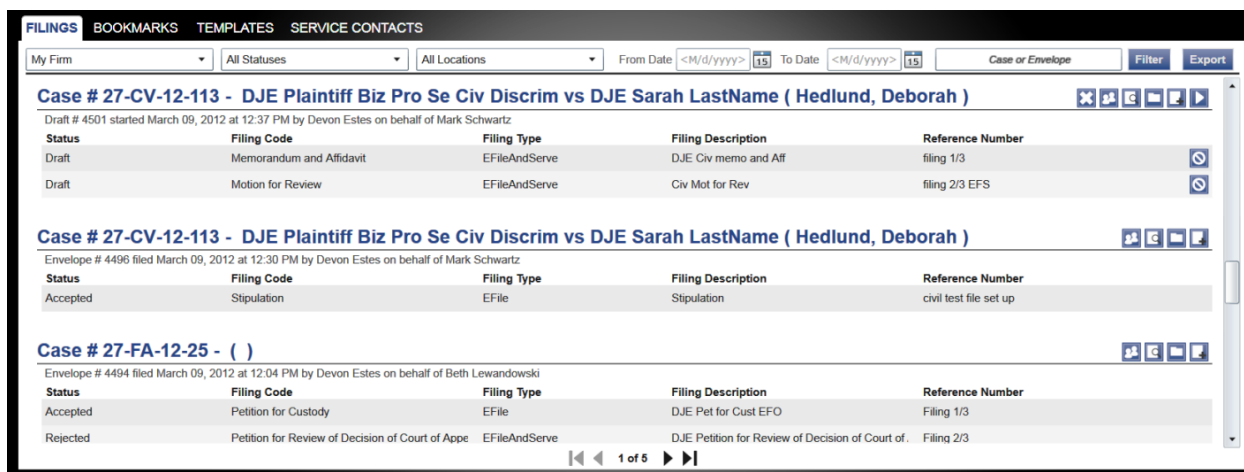


Figure 14.1 – Filings Page

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

3. Click .

The *Manage Case Service Contacts* page is displayed.

**Manage Case Service Contacts**

**Select Contacts to Receive Service for each Party**

**Defendent: adding test party party**  
**Plaintiff: testing adding addtl party**

**Other Service Contacts**

Jameson Aurther Westinghouse (jaw@rawitserlaw.com)			
Adam Record (aefstest6@gmail.com)			
Adam Smith (aefstest2@gmail.com)			
New Service contact contact Testing (TestingContact1@tylertech.com)			
s p (steven.pham@tylertech.com)			
tamasha Anderson (Anderson@testingt.com)			
Tamasha motor (tamashatest@gmail.com)			
Tim Thompson (werwer@test.com)			

**Add New** **Add From Master List** **Add From Public List** **Show History**

**First Name\*** Jameson **Middle** Aurther **Last Name\*** Westinghouse  
**Email\*** jaw@rawitserlaw.com **Administrative Copy** kathy@rawitserlaw.com **Firm Name** Rawitser Law Firm  
**Address** 7977 E. Frankford Way **City** Mountain City  
**State** Alaska **Zip Code** 112123  
**Phone** (xxx)xxx-xxxx  
 **Make this contact Public**

**Save Contact in My Firm Master Service List** **Save** **Cancel**

Figure 14.2 – Manage Case Service Contacts Page

4. Click the name of the service contact to add to the case, or click **Add New**.

**Note:** If there is no email address displayed for the service contact, the contact cannot be served. You must 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 email address in the **Administrative Copy** field.

The administrative email is an optional email 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 **Save** to save the contact.

# ADDING SERVICE CONTACTS FROM A MASTER LIST

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

To add service contacts to the **Case Service Contacts** list, perform the following steps:

1. Click **WORKSPACE**.


The *Filings* page is displayed.

The screenshot shows the 'FILINGS' page with a navigation bar at the top containing 'FILINGS', 'BOOKMARKS', 'TEMPLATES', and 'SERVICE CONTACTS'. Below the navigation bar are several filters: 'My Firm', 'All Statuses', 'All Locations', 'From Date' (set to 3/15), 'To Date' (set to 3/15), 'Case or Envelope', 'Filter', and 'Export'. The main content area displays three case entries:

- Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**: Draft # 4501 started March 09, 2012 at 12:37 PM by Devon Estes on behalf of Mark Schwartz. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Rows include 'Draft' for 'Memorandum and Affidavit' (EFileAndServe, filing 1/3) and 'Draft' for 'Motion for Review' (EFileAndServe, filing 2/3 EFS).
- Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**: Envelope # 4496 filed March 09, 2012 at 12:30 PM by Devon Estes on behalf of Mark Schwartz. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Row includes 'Accepted' for 'Stipulation' (EFile, civil test file set up).
- Case # 27-FA-12-25 - ( )**: Envelope # 4494 filed March 09, 2012 at 12:04 PM by Devon Estes on behalf of Beth Lewandowski. Includes a table with columns: Status, Filing Code, Filing Type, Filing Description, Reference Number. Rows include 'Accepted' for 'Petition for Custody' (EFile, DJE Pet for Cust EFO, Filing 1/3) and 'Rejected' for 'Petition for Review of Decision of Court of Appe' (EFileAndServe, DJE Petition for Review of Decision of Court of, Filing 2/3).

At the bottom of the page, there is a pagination control showing '1 of 5'.

Figure 14.3 – Filings Page

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

































The *Manage Case Service Contacts* page is displayed.

**Manage Case Service Contacts**



**Select Contacts to Receive Service for each Party**

**Defendent: adding test party party**  
**Plaintiff: testing adding addtl party**

▾ **Other Service Contacts**

Jameson Aurther Westinghouse (jaw@rawitserlaw.com)	   
Adam Record (aefstest6@gmail.com)	   
Adam Smith (aefstest2@gmail.com)	   
New Service contact contact Testing (TestingContact1@tylertech.com)	   
s p (steven.pham@tylertech.com)	   
tamasha Anderson (Anderson@testingt.com)	   
Tamasha motor (tamashatest@gmail.com)	   
Tim Thompson (werwer@test.com)	   

**Add New** **Add From Master List** **Add From Public List** **Show History**

**First Name\*** Jameson **Middle** Aurther **Last Name\*** Westinghouse  
**Email\*** jaw@rawitserlaw.com **Administrative Copy**  kathy@rawitserlaw.com **Firm Name** Rawitser Law Firm  
**Address** 7977 E. Frankford Way **City** Mountain City  
**State** Alaska **Zip Code** 112123  
**Phone**  (xxx)xxx-xxxx  
 **Make this contact Public**

Save Contact in My Firm Master Service List **Save** **Cancel**

Figure 14.4 – Manage Case Service Contacts Page

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

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

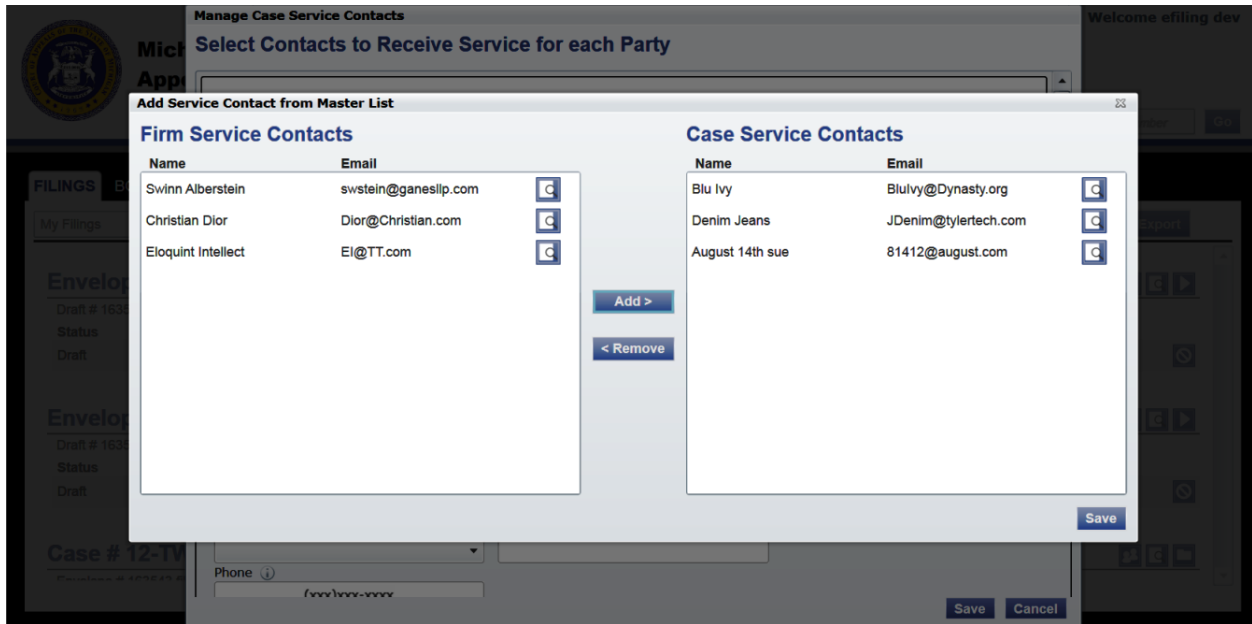


Figure 14.5 – Add Service Contact from Master List Page

5. Select the service contact from the **Firm Service Contacts** list.
6. Click **Add >** to add the service contact to the **Case Service Contacts** list.  
The new contact information is displayed in the **Case Service Contacts** list.
7. Click **Save** to save the **Case Service Contacts** list.

## ADDING SERVICE CONTACTS FROM A PUBLIC LIST

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






To add service contacts to the **Case Service Contacts** list, perform the following steps:

1. Click **WORKSPACE**.



The *Filings* page is displayed.





**FILINGS** BOOKMARKS TEMPLATES SERVICE CONTACTS

My Firm All Statuses All Locations From Date <M/d/yyyy> 15 To Date <M/d/yyyy> 15 Case or Envelope Filter Export

**Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**     





Draft # 4501 started March 09, 2012 at 12:37 PM by Devon Estes on behalf of Mark Schwartz

Status	Filing Code	Filing Type	Filing Description	Reference Number
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3 
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS 

**Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**    

Envelope # 4496 filed March 09, 2012 at 12:30 PM by Devon Estes on behalf of Mark Schwartz

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Stipulation	EFile	Stipulation	civil test file set up

**Case # 27-FA-12-25 - ( )**    


Envelope # 4494 filed March 09, 2012 at 12:04 PM by Devon Estes on behalf of Beth Lewandowski

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3
Rejected	Petition for Review of Decision of Court of Appe	EFileAndServe	DJE Petition for Review of Decision of Court of	Filing 2/3

1 of 5

Figure 14.6 – Filings Page

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

3. Click  to view the service contact information.

The *Manage Case Service Contacts* page is displayed.

**Manage Case Service Contacts**

**Select Contacts to Receive Service for each Party**

**Defendent: adding test party party**

**Plaintiff: testing adding addtl party**

**Other Service Contacts**

Jameson Aurther Westinghouse (jaw@rawitserlaw.com)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Adam Record (aefstest6@gmail.com)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Adam Smith (aefstest2@gmail.com)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
New Service contact contact Testing (TestingContact1@tylertech.com)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
s p (steven.pham@tylertech.com)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
tamasha Anderson (Anderson@testingt看.com)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Tamasha motor (tamashatest@gmail.com)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Tim Thompson (werwer@test.com)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

<b>First Name*</b>	<b>Middle</b>	<b>Last Name*</b>
<input type="text" value="Jameson"/>	<input type="text" value="Aurther"/>	<input type="text" value="Westinghouse"/>
<b>Email*</b>	<b>Administrative Copy</b> ⓘ	<b>Firm Name</b>
<input type="text" value="jaw@rawitserlaw.com"/>	<input type="text" value="kathy@rawitserlaw.com"/>	<input type="text" value="Rawitser Law Firm"/>
<b>Address</b>		<b>City</b>
<input type="text" value="7977 E. Frankford Way"/>		<input type="text" value="Mountain City"/>
<b>State</b>	<b>Zip Code</b>	
<input type="text" value="Alaska"/>	<input type="text" value="112123"/>	
<b>Phone</b> ⓘ		
<input type="text" value="(xxx)xxx-xxxx"/>		
<input checked="" type="checkbox"/> <b>Make this contact Public</b>		

Save Contact in My Firm Master Service List

Figure 14.7 – Manage Case Service Contacts Page

- Click **Add From Public List**.

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

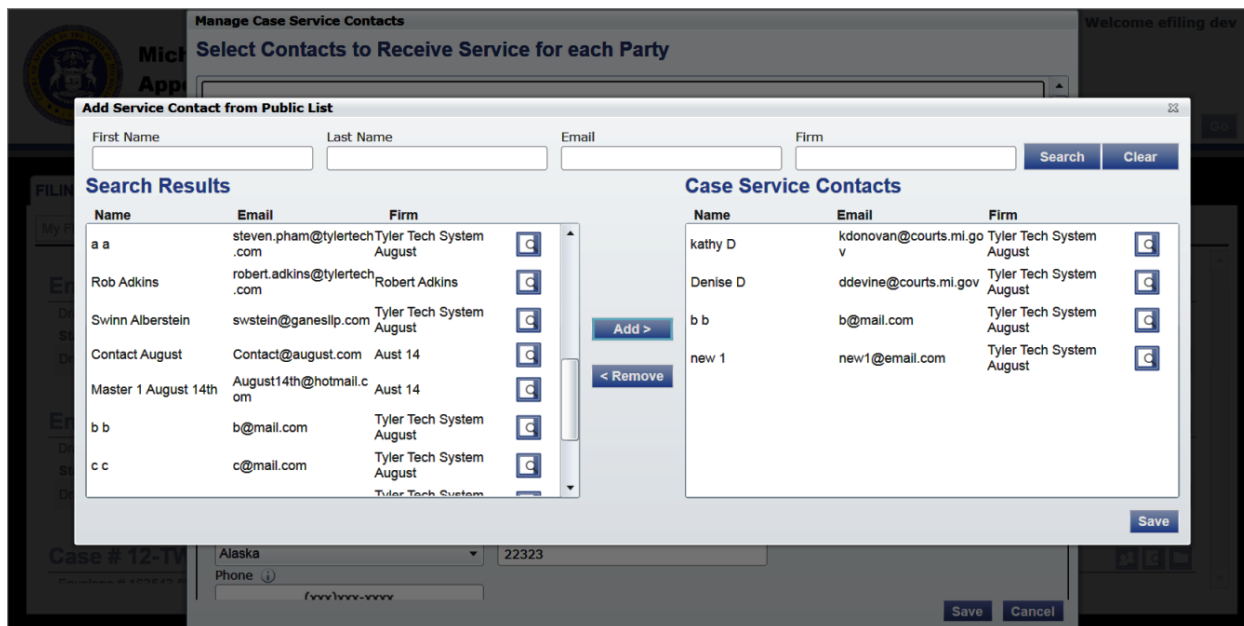


Figure 14.8 – Add Service Contact from Public List Window

5. Type the name or email address in the fields provided. Then, click **Search** to search for a specific service contact. Or click **Search** to display all available service contacts.
6. Select the service contact from the **Search Results** list.
7. Click **Add >** to add the service contact to the **Case Service Contacts** list.  
The new contact information is displayed in the **Case Service Contacts** list.
8. Click **Save** to save the **Case Service Contacts** list.

## VIEWING SERVICE CONTACTS HISTORY

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






To view a service contact's history, perform the following steps:

1. Click **WORKSPACE**.



The *Filings* page is displayed.





**FILINGS** BOOKMARKS TEMPLATES SERVICE CONTACTS

My Firm All Statuses All Locations From Date <M/d/yyyy> 15 To Date <M/d/yyyy> 15 Case or Envelope Filter Export

**Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**     





Draft # 4501 started March 09, 2012 at 12:37 PM by Devon Estes on behalf of Mark Schwartz

Status	Filing Code	Filing Type	Filing Description	Reference Number
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3 
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS 

**Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**    

Envelope # 4496 filed March 09, 2012 at 12:30 PM by Devon Estes on behalf of Mark Schwartz

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Stipulation	EFile	Stipulation	civil test file set up

**Case # 27-FA-12-25 - ( )**    


Envelope # 4494 filed March 09, 2012 at 12:04 PM by Devon Estes on behalf of Beth Lewandowski

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3
Rejected	Petition for Review of Decision of Court of Appe	EFileAndServe	DJE Petition for Review of Decision of Court of	Filing 2/3

1 of 5

Figure 14.9 – Filings Page

2. Locate the case for which you want to view a service contact's history.

3. Click  to view the service contact information.

































The *Manage Case Service Contacts* page is displayed.

**Manage Case Service Contacts**

**Select Contacts to Receive Service for each Party**

**Defendent: adding test party party**  
**Plaintiff: testing adding addtl party**

**Other Service Contacts**

Jameson Aurther Westinghouse (jaw@rawitserlaw.com)	   
Adam Record (aefstest6@gmail.com)	   
Adam Smith (aefstest2@gmail.com)	   
New Service contact contact Testing (TestingContact1@tylertech.com)	   
s p (steven.pham@tylertech.com)	   
tamasha Anderson (Anderson@testingt.com)	   
Tamasha motor (tamashatest@gmail.com)	   
Tim Thompson (werwer@test.com)	   

**Add New** **Add From Master List** **Add From Public List** **Show History**

**First Name\*** Jameson **Middle** Aurther **Last Name\*** Westinghouse  
**Email\*** jaw@rawitserlaw.com **Administrative Copy** kathy@rawitserlaw.com **Firm Name** Rawitser Law Firm  
**Address** 7977 E. Frankford Way **City** Mountain City  
**State** Alaska **Zip Code** 112123  
**Phone** (xxx)xxx-xxxx  
 **Make this contact Public**

**Save Contact in My Firm Master Service List** **Save** **Cancel**

Figure 14.10 – Manage Case Service Contacts Page

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

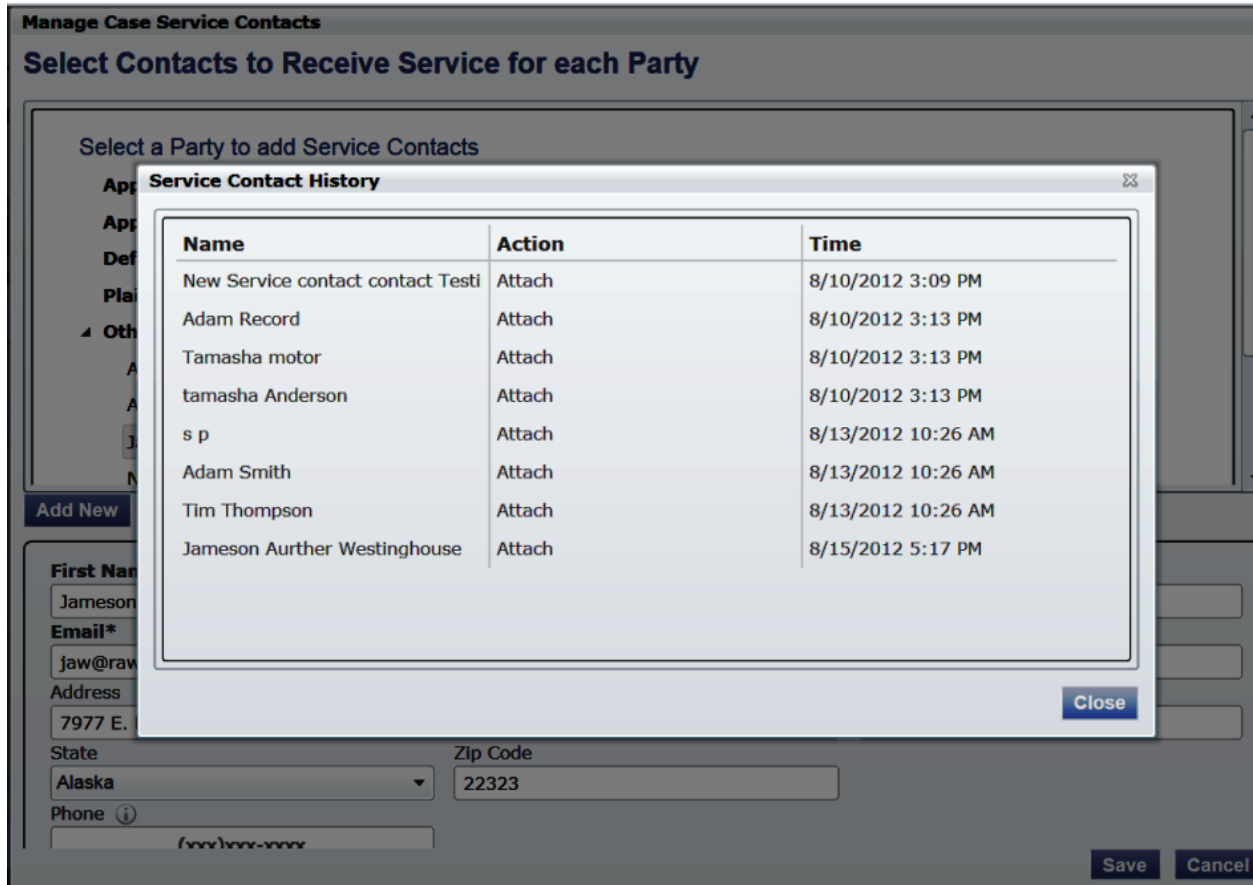


Figure 14.11 – Service Contact History Window

- Click **Close** to close the *Service Contact History* page and return to the *Manage Case Service Contacts* page.

## VIEWING THE SERVICE CONTACT DETAILS

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

To view the service contact details of a contact, perform the following steps:

- Click **SERVICE CONTACTS**.

The *Service Contacts* page is displayed.

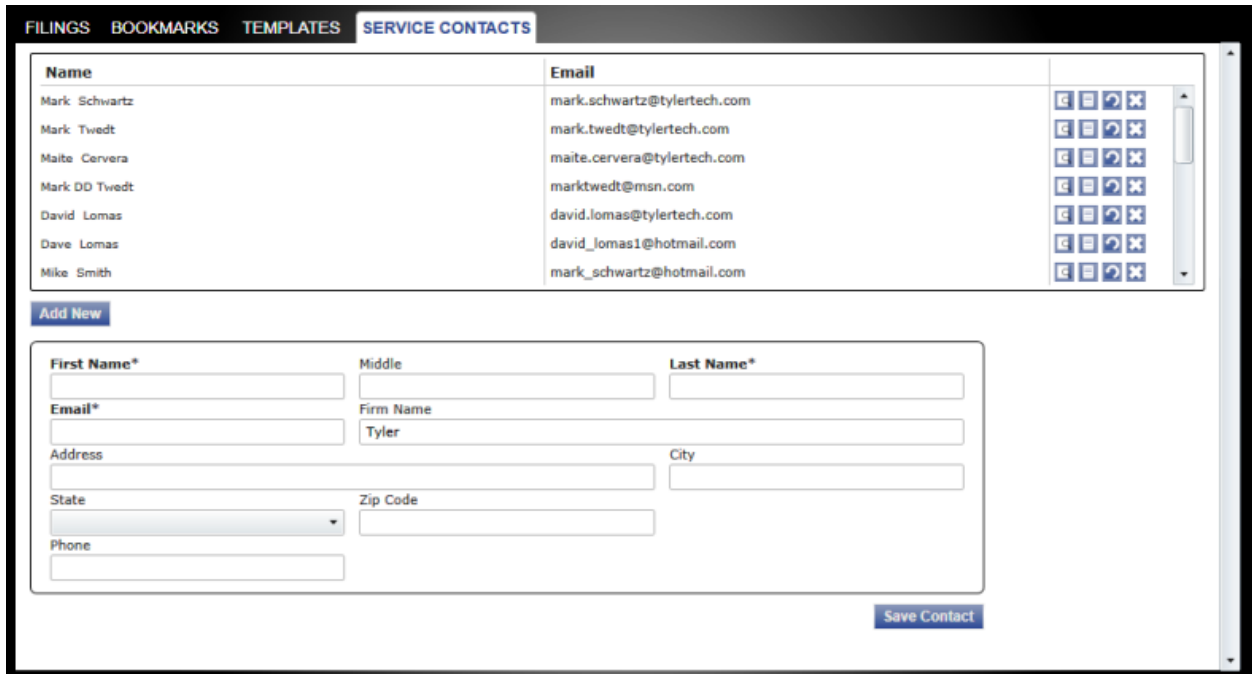


Figure 14.12 – Service Contacts Page

2. Locate the service contact for whom you want to view the details.

3. Click  for the specified service contact.

The *Service Contact Details* window opens, displaying the information about the service contact.

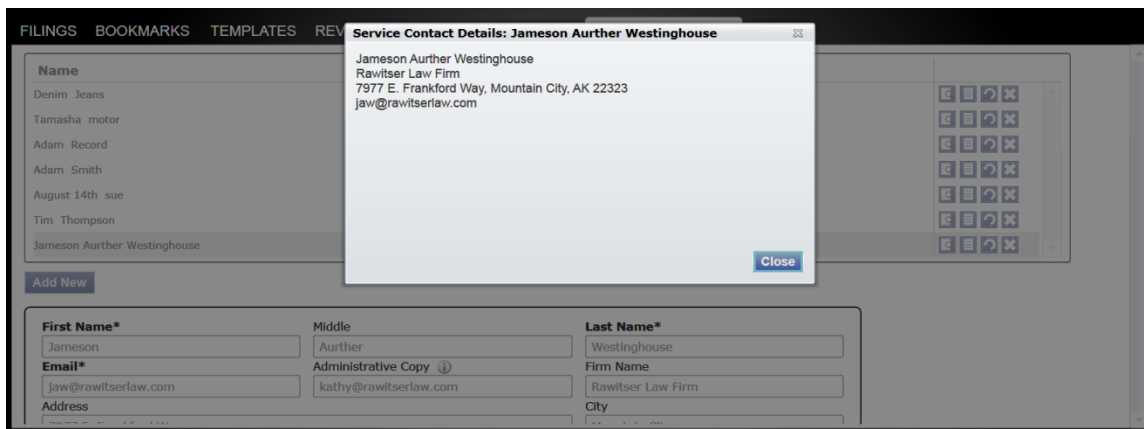



Figure 14.13 – Service Contact Details Window

4. Click  to return to the **Service Contacts** list.

## VIEWING THE ATTACHED CASE LIST

You can view the **Attached Case** list for a service contact.

To view the **Attached Case** list for a service contact on the *Service Contacts* page, perform the following steps:

1. Click **SERVICE CONTACTS**.

The *Service Contacts* page is displayed.

The screenshot shows the 'SERVICE CONTACTS' page with a navigation bar at the top containing 'FILINGS', 'BOOKMARKS', 'TEMPLATES', and 'SERVICE CONTACTS'. Below the navigation bar is a table with two columns: 'Name' and 'Email'. The table contains four rows of contact information. To the right of each row are four icons: a list icon, a refresh icon, a search icon, and a delete icon. Below the table is an 'Add New' button. Underneath the button is a form with several fields: 'First Name\*' (Simon), 'Middle' (C), 'Last Name\*' (James), 'Email\*' (sc1@tt.com), 'Administrative Copy' (john@tt.com), 'Firm Name' (Law Firm and Associates), 'Country\*' (United States of America), 'Address Line 1\*' (68900 Interior Pkwy), 'City\*' (Catalina), 'State\*' (Oregon), 'Zip Code\*' (52324), 'Phone' (729-700-2328), and a checkbox for 'Make this contact Public' which is checked. A 'Save Contact' button is located at the bottom right of the form.

Name	Email
Simon C James	sc1@tt.com
Service Contact 3	sc3@tt.com
Service Contact 4	sc4@tt.com
SK Public Contact Test	skpublic@tylertech.com

**Add New**

**First Name\*** Simon      **Middle** C      **Last Name\*** James  
**Email\*** sc1@tt.com      **Administrative Copy** john@tt.com      **Firm Name** Law Firm and Associates  
**Country\*** United States of America  
**Address Line 1\*** 68900 Interior Pkwy  
**City\*** Catalina  
**State\*** Oregon      **Zip Code\*** 52324  
**Phone** 729-700-2328  
 **Make this contact Public**

**Save Contact**

Figure 14.14 – Service Contacts Page

2. Click  for the specified service contact.

The *Attached Cases* window for the specified contact is displayed.

3. Click **Close** to return to the *Service Contacts* page.

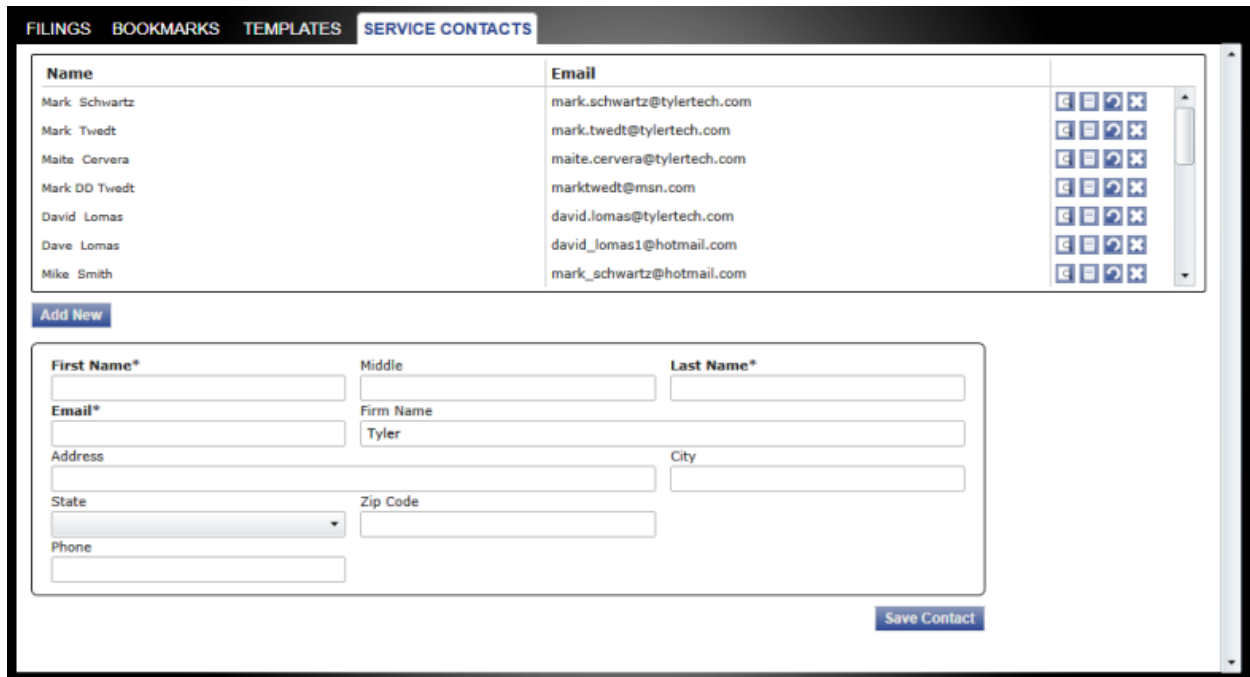
## REPLACING SERVICE CONTACTS ON THE CASE

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

To replace a service contact in the **Service Contacts** list, perform the following steps:

1. Click **SERVICE CONTACTS**.

The *Service Contacts* page is displayed.



The screenshot shows a web application interface with a navigation bar at the top containing 'FILINGS', 'BOOKMARKS', 'TEMPLATES', and 'SERVICE CONTACTS'. The 'SERVICE CONTACTS' tab is active. Below the navigation bar is a table with two columns: 'Name' and 'Email'. The table contains the following data:


Name	Email
Mark Schwartz	mark.schwartz@tylertech.com
Mark Twedt	mark.twedt@tylertech.com
Maite Cervera	maite.cervera@tylertech.com
Mark DD Twedt	marktwedt@msn.com
David Lomas	david.lomas@tylertech.com
Dave Lomas	david_lomas1@hotmail.com
Mike Smith	mark_schwartz@hotmail.com

Below the table is an 'Add New' button. Underneath is a form with the following fields:

- First Name\* (text input)
- Middle (text input)
- Last Name\* (text input)
- Email\* (text input)
- Firm Name (text input)
- Tyler (text input)
- Address (text input)
- City (text input)
- State (dropdown menu)
- Zip Code (text input)
- Phone (text input)

A 'Save Contact' button is located at the bottom right of the form.

Figure 14.15 – Service Contacts Page

2. Click  for the specified service contact.

The *Replace Service Contact* window is displayed.

**Replace Service Contact: Polly Doe** ✕

Replace with new contact    Replace with existing contact

**First Name\***    **Middle**    **Last Name\***

**Email\***    **Administrative Copy** ⓘ    **Firm Name**

**Country**

**Address Line 1**

**Address Line 2**

**City**

**Region**    **Zip Code**

**Phone**

Make this contact Public

**Save Contact**

Figure 14.16 – Replace Service Contact Window

3. Do one of the following:

- If you are replacing the specified service contact with a new contact, select the **Replace with new contact** option. Complete the required fields for the new contact, and then click **Save Contact**.
- If you are replacing the specified service contact with an existing service contact, select the **Replace with existing contact** option. Select the replacement service contact from the **Select existing contact** drop-down list, and then click **Save Contact**.

**Replace Service Contact: Polly Doe**

Replace with new contact  Replace with existing contact

Select existing contact\*

- Anthony Doe
- Henry Doe
- Hilary Doe
- Melinda Doe
- Priscilla Doe
- Raymond Doe
- Robert Doe
- William Doe

Save Contact

Figure 14.17 – Replace Service Contact Window – Select existing contact Drop-Down List

The new contact information is displayed in the **Service Contacts** list.

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

## REMOVING SERVICE CONTACTS FROM A MASTER LIST

You can remove service contacts from the **Case Service Contacts** list of the Master List.

To remove service contacts from the **Case Service Contacts** list, perform the following steps:

1. Click **WORKSPACE**.

The *Filings* page is displayed.

The screenshot shows a web interface for managing filings. At the top, there are navigation tabs: FILINGS, BOOKMARKS, TEMPLATES, and SERVICE CONTACTS. Below these are search filters for 'My Firm', 'All Statuses', 'All Locations', 'From Date', and 'To Date'. The main content area displays three case entries, each with a table of filing details.

**Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**

Status	Filing Code	Filing Type	Filing Description	Reference Number
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS


**Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Stipulation	EFile	Stipulation	civil test file set up

**Case # 27-FA-12-25 - ( )**

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3
Rejected	Petition for Review of Decision of Court of Appe	EFileAndServe	DJE Petition for Review of Decision of Court of	Filing 2/3

Figure 14.18 – Filings Page

2. Locate the case from which you want to remove the service contact.
3. Click  to view the service contact information.  
The *Manage Case Service Contacts* page is displayed.

**Manage Case Service Contacts**

**Select Contacts to Receive Service for each Party**

**Defendent: adding test party party**  
**Plaintiff: testing adding addtl party**

**Other Service Contacts**

Jameson Aurther Westinghouse (jaw@rawitserlaw.com)			
Adam Record (aefstest6@gmail.com)			
Adam Smith (aefstest2@gmail.com)			
New Service contact contact Testing (TestingContact1@tylertech.com)			
s p (steven.pham@tylertech.com)			
tamasha Anderson (Anderson@testingt看.com)			
Tamasha motor (tamashatest@gmail.com)			
Tim Thompson (werwer@test.com)			

**Add New** **Add From Master List** **Add From Public List** **Show History**

**First Name\*** Jameson **Middle** Aurther **Last Name\*** Westinghouse  
**Email\*** jaw@rawitserlaw.com **Administrative Copy** kathy@rawitserlaw.com **Firm Name** Rawitser Law Firm  
**Address** 7977 E. Frankford Way **City** Mountain City  
**State** Alaska **Zip Code** 112123  
**Phone** (xxx)xxx-xxxx  
 **Make this contact Public**

**Save Contact in My Firm Master Service List** **Save** **Cancel**

Figure 14.19 – Manage Case Service Contacts Page

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

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

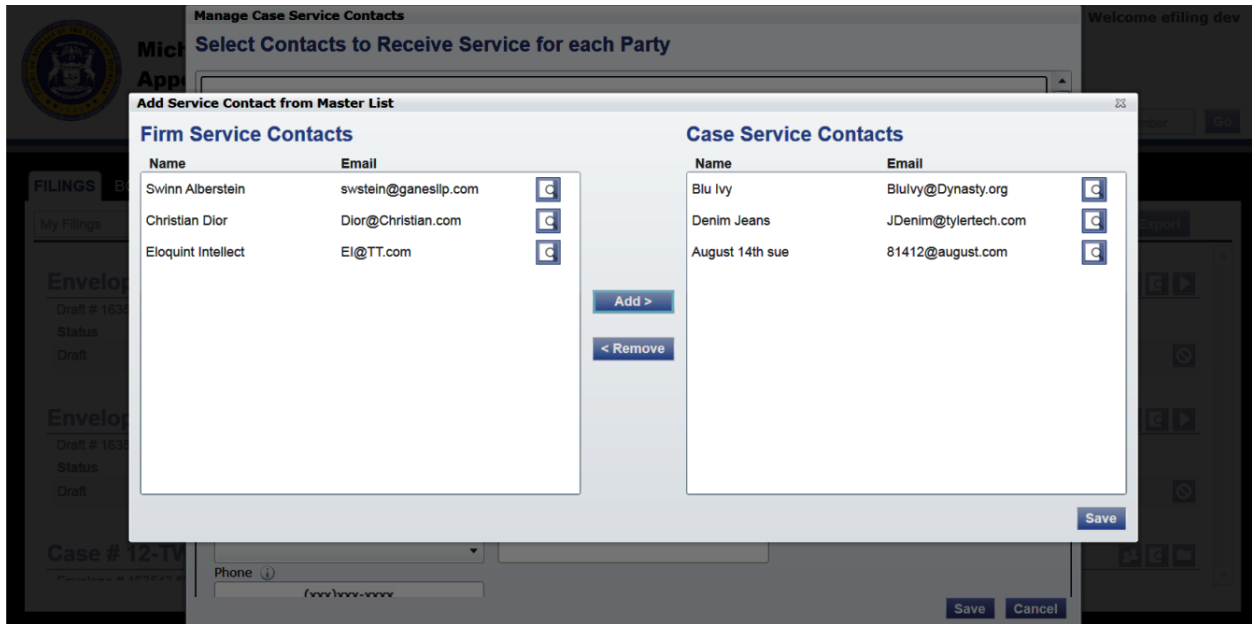


Figure 14.20 – Add Service Contact from Master List Page

5. From the **Firm Service Contacts** list, select the service contact that you want to remove.
6. Click **< Remove** to remove the specified contact from the **Case Service Contacts** list.
7. Click **Save** to save the **Case Service Contacts** list.

## REMOVING SERVICE CONTACTS FROM A PUBLIC LIST






You can remove service contacts from the **Case Service Contacts** list in the public list of contacts. To remove service contacts from the **Case Service Contacts** list, perform the following steps:

1. Click **WORKSPACE**.

The *Filings* page is displayed.





**FILINGS** BOOKMARKS TEMPLATES SERVICE CONTACTS

My Firm All Statuses All Locations From Date <M/d/yyyy> 15 To Date <M/d/yyyy> 15 Case or Envelope Filter Export

**Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**     





Draft # 4501 started March 09, 2012 at 12:37 PM by Devon Estes on behalf of Mark Schwartz

Status	Filing Code	Filing Type	Filing Description	Reference Number
Draft	Memorandum and Affidavit	EFileAndServe	DJE Civ memo and Aff	filing 1/3
Draft	Motion for Review	EFileAndServe	Civ Mot for Rev	filing 2/3 EFS

**Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName ( Hedlund, Deborah )**    

Envelope # 4496 filed March 09, 2012 at 12:30 PM by Devon Estes on behalf of Mark Schwartz

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Stipulation	EFile	Stipulation	civil test file set up


**Case # 27-FA-12-25 - ( )**    

Envelope # 4494 filed March 09, 2012 at 12:04 PM by Devon Estes on behalf of Beth Lewandowski

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Petition for Custody	EFile	DJE Pet for Cust EFO	Filing 1/3
Rejected	Petition for Review of Decision of Court of Appe	EFileAndServe	DJE Petition for Review of Decision of Court of	Filing 2/3

1 of 5

**Figure 14.21 – Filings Page**

2. Locate the case from which you want to remove the service contact.
3. Click  to view the service contact information.

The *Manage Case Service Contacts* page is displayed.

**Manage Case Service Contacts**

**Select Contacts to Receive Service for each Party**

**Defendent: adding test party party**  
**Plaintiff: testing adding addtl party**

**Other Service Contacts**

Jameson Aurther Westinghouse (jaw@rawitserlaw.com)				
Adam Record (aefstest6@gmail.com)				
Adam Smith (aefstest2@gmail.com)				
New Service contact contact Testing (TestingContact1@tylertech.com)				
s p (steven.pham@tylertech.com)				
tamasha Anderson (Anderson@testingt看.com)				
Tamasha motor (tamashatest@gmail.com)				
Tim Thompson (werwer@test.com)				

**Add New**   **Add From Master List**   **Add From Public List**   **Show History**

**First Name\*** Jameson   **Middle** Aurther   **Last Name\*** Westinghouse  
**Email\*** jaw@rawitserlaw.com   **Administrative Copy** kathy@rawitserlaw.com   **Firm Name** Rawitser Law Firm  
**Address** 7977 E. Frankford Way   **City** Mountain City  
**State** Alaska   **Zip Code** 112123  
**Phone** (xxx)xxx-xxxx  
 **Make this contact Public**

**Save Contact in My Firm Master Service List**

**Save**   **Cancel**

Figure 14.22 – Manage Case Service Contacts Page

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

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

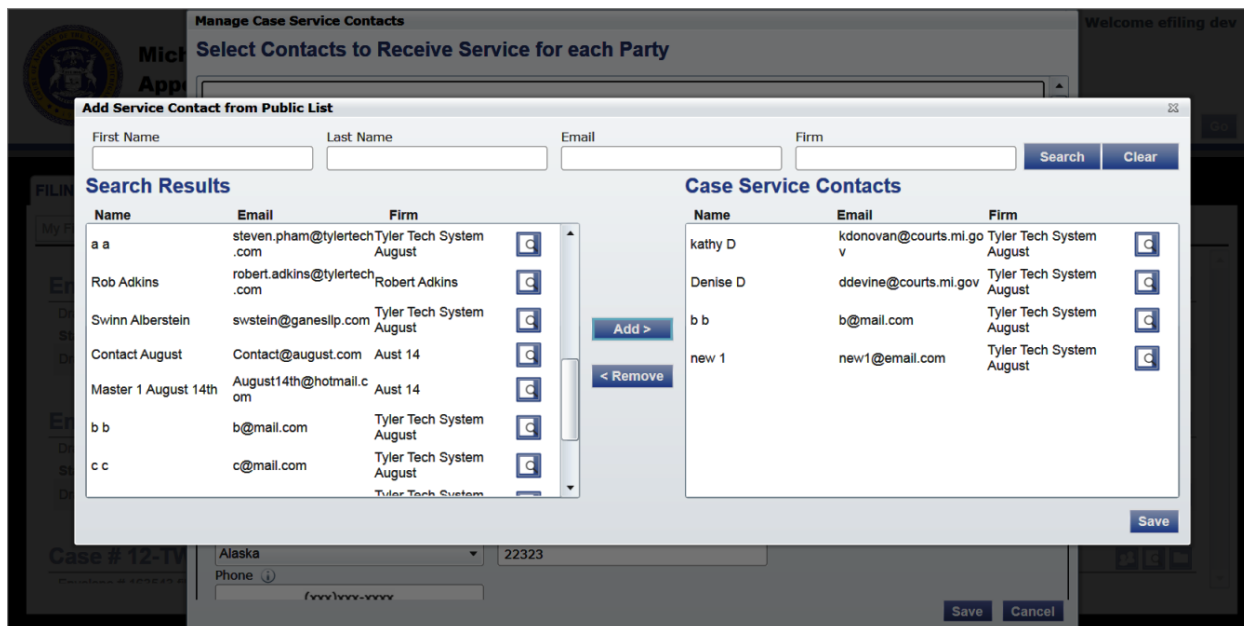


Figure 14.23 – Add Service Contact from Public List Page

5. Type the name or email address in the fields provided, and then click **Search** to search for a specific service contact. Or click **Search** to display all available service contacts.
6. Select the service contact from the **Search Results** list.
7. Select a contact from the **Case Service Contacts** list, and then click **< Remove** to remove the contact from the **Case Service Contacts** list.
8. Click **Save** to save the **Case Service Contacts** list.

## DEACTIVATING A SERVICE CONTACT

















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

To deactivate a service contact in the **Service Contacts** list, perform the following steps:

1. Click **SERVICE CONTACTS**.

The *Service Contacts* page is displayed.

FILINGS BOOKMARKS TEMPLATES **SERVICE CONTACTS**


Name	Email	
Simon C James	sc1@tt.com	   
Service Contact 3	sc3@tt.com	   
Service Contact 4	sc4@tt.com	   
SK Public Contact Test	skpublic@tylertech.com	   

**Add New**

<b>First Name*</b> Simon	<b>Middle</b> C	<b>Last Name*</b> James
<b>Email*</b> sc1@tt.com	<b>Administrative Copy</b> ⓘ john@tt.com	<b>Firm Name</b> Law Firm and Associates
<b>Country*</b> United States of America		
<b>Address Line 1*</b> 68900 Interior Pkwy		
<b>City*</b> Catalina		
<b>State*</b> Oregon	<b>Zip Code*</b> 52324	
<b>Phone</b> 729-700-2328		
<input checked="" type="checkbox"/> Make this contact Public ⓘ		

**Save Contact**

Figure 14.24 – Service Contacts Page

- Click  for the specified service contact.

The service contact is removed from the **Service Contacts** list.

**Note:** A notification is sent to the service contacts that are being removed from the case. The administrator's email that is attached to the contact is also removed.

# CHAPTER 15 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	<a href="mailto:efiling.support@tylertech.com">efiling.support@tylertech.com</a>
Odyssey File & Serve Support Hours	7:00 a.m. to 9:00 p.m. (CT), Monday through Friday
Odyssey File & Serve Support Chat	Assistance is also available online through <a href="#">Support Chat</a> .
GoTo Assist (Support)	Support may ask to assist you by sharing your screen using <a href="#">GoToAssist</a> .