Individual Filer User Guide

Odyssey® File & Serve™ 2021.1
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This notification constitutes part of the documentation and must not be removed.

# Publishing History

<table>
<thead>
<tr>
<th>Document Publication Number</th>
<th>Revision</th>
<th>Date</th>
<th>Changes Made</th>
</tr>
</thead>
<tbody>
<tr>
<td>OFS-FS-200-4494 v.1</td>
<td>Initial</td>
<td>July 2019</td>
<td>Document Creation</td>
</tr>
<tr>
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<td>Second</td>
<td>December 2019</td>
<td>The following changes were made:</td>
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<tr>
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<td>• Added sections for templates, bookmarks, and the Redaction feature.</td>
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<td>• Added a procedure for non-indexed subsequent filing.</td>
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<td>• Added a procedure for entering case information for a civil case.</td>
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<td>• Added a procedure for entering case cross references to a filing.</td>
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<td>• Added a procedure for entering a filing with a motion type code.</td>
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<td>• Added a section for client support and feedback.</td>
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<td>• Updated the description and screen shots of the Dashboard and the drop-down menu for filer actions.</td>
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<td>• Updated screen shots throughout the document to reflect minor software changes.</td>
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<tr>
<td>OFS-FS-200-4494 v.3</td>
<td>Third</td>
<td>February 2020</td>
<td>The following changes were made:</td>
</tr>
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<td></td>
<td></td>
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<td>• Added a procedure for filing a new case with a Will Filed date.</td>
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<td>• Added a procedure for entering the date of death on the Parties page.</td>
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<td>Document Publication Number</td>
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<td>• Added a procedure for entering a filing with an Ad Damnum amount.</td>
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<td>• Added a procedure for entering a filing with a Claim Amount.</td>
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<td></td>
<td>• Added a procedure for entering a filing with an Estate Value.</td>
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<td>• Updated the <em>Parties</em> page.</td>
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<td></td>
<td></td>
<td>• Updated the procedure for entering a filing.</td>
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<td>• Updated the Redaction section.</td>
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<td>• Added a procedure for copying an envelope.</td>
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<td>• Updated the <em>Fees</em> page.</td>
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<td></td>
<td>• Updated the <em>Summary</em> page.</td>
</tr>
<tr>
<td>OFS-FS-200-4494 v.4</td>
<td>Fourth</td>
<td>April 2020</td>
<td>The following changes were made:</td>
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<td>• Added the Return Date feature.</td>
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<td>• Added the Hearing Date feature.</td>
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<td>• Added a note throughout the document regarding the <em>Party Responsible for Fees</em> field.</td>
</tr>
<tr>
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<td>June 2020</td>
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<td>• Added the Reports feature.</td>
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<td>• Added the <em>Dashboard</em> button to the <em>Case Search</em> page.</td>
</tr>
<tr>
<td>OFS-FS-200-4494 v.6</td>
<td>Sixth</td>
<td>September 2020</td>
<td>The following changes were made:</td>
</tr>
<tr>
<td></td>
<td></td>
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<td>• Updated release number to match the current software release</td>
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<td>• Added browser support for Microsoft® Edge® to the “System Requirements” section</td>
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<tr>
<td>Document Publication Number</td>
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</tr>
<tr>
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<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ESO-FS-200-4494 v.7</td>
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<td>The following changes were made:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added a note to the envelope details section regarding newly-added parties for subsequent filings</td>
</tr>
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<td></td>
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<td></td>
<td>• Added a note in all existing case topics indicating that the Add Party button is configurable for subsequent filings</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added a new screen shot for the File into Existing Case window when the Party Name search option is not displayed.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Information was added to the following topics:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>– Orientation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>– Dashboard Page</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>– Filing into an Existing Case from the Case Search Page</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>– Filing into an Existing Case from the Dashboard Page</td>
</tr>
<tr>
<td></td>
<td></td>
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<td>– Filing into a Non-Indexed Case</td>
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<tr>
<td></td>
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<td>• Added a section describing the new Zendesk Help icon</td>
</tr>
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<td></td>
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<td>• Changed the document numbering to reflect new standards</td>
</tr>
<tr>
<td>ESO-FS-200-4494 v.8</td>
<td>Eighth</td>
<td>December 2020</td>
<td>The following changes were made:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Updated the screen shot for the Reports page</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Added the document security option to the “Creating a Service Only Filing” topic</td>
</tr>
</tbody>
</table>
Contents

Copyright and Confidentiality .................................................................................. ii
Publishing History .................................................................................................. ii
List of Figures .......................................................................................................... vii
   About This Guide .................................................................................................. xi
1 System Overview .................................................................................................. 1
   Before You Begin .................................................................................................. 1
      System Requirements ....................................................................................... 1
      Page Navigation ............................................................................................... 2
      Error Messages ................................................................................................. 2
      Orientation ......................................................................................................... 2
2 E-Filing Overview .................................................................................................. 9
   Filing Queue Status .............................................................................................. 10
3 Landing Page ......................................................................................................... 12
   Registering as an Individual Filer ....................................................................... 12
   Resetting Your Password ................................................................................... 15
   Changing the User Password .............................................................................. 17
   Updating User Information ................................................................................ 17
4 Sign In and Sign Out ............................................................................................. 19
   Signing In .............................................................................................................. 19
   Signing Out ........................................................................................................... 20
5 Dashboard ............................................................................................................. 21
   Dashboard Page .................................................................................................. 22
6 Payment Accounts ................................................................................................ 26
   Adding a Waiver Payment Account .................................................................... 26
   Adding a Credit Card Payment Account ............................................................ 27
   Adding an E-Check Payment Account ................................................................. 30
   Editing a Payment Account ................................................................................ 34
   Deleting a Payment Account .............................................................................. 35
7 Templates ............................................................................................................... 37
   Adding a Template .............................................................................................. 37
   Editing a Template .............................................................................................. 39
   Using a New Case Template ............................................................................... 40
   Using an Existing Case Template ..................................................................... 40
   Copying a Template ............................................................................................ 42
   Deleting a Template ........................................................................................... 43
8 Case Initiation ....................................................................................................... 45
   Uploading Documents for a New Case Filing ..................................................... 46
   Entering Case Information .................................................................................. 47
   Entering Case Information for a Civil Case ....................................................... 48
   Filing a New Case with Case Cross References ............................................... 49
   Filing a New Case with a Will Filed Date ............................................................ 51
   Entering Party Details ......................................................................................... 54
   Entering Date of Death on Parties Page ............................................................. 56
   Entering Filing Details ......................................................................................... 60
   Capability for Filing a Return Date ..................................................................... 63
   Selecting a Return Date for a Case Filing ........................................................... 64
   Reverify the Return Date .................................................................................... 67
   Reverifying a Return Date .................................................................................... 67
   Capability for Filing Hearing Date ....................................................................... 68
   Scheduling a Hearing Date for a New Case Filing .............................................. 68
   Scheduling a Hearing for an Existing Case Filing .............................................. 73
   Entering a Filing with an Ad Damnum Amount ............................................... 75
   Entering a Filing with a Motion Type Code ....................................................... 79
   Entering a Filing with a Claim Amount ............................................................. 83
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entering a Filing with an Estate Value</td>
<td>88</td>
</tr>
<tr>
<td>Entering Payment Information</td>
<td>93</td>
</tr>
<tr>
<td>Entering Payment Information for Per-Page Optional Service Fee</td>
<td>95</td>
</tr>
<tr>
<td>Submission Agreements</td>
<td>97</td>
</tr>
<tr>
<td>Viewing the Envelope Summary</td>
<td>98</td>
</tr>
<tr>
<td>Redaction Feature</td>
<td>100</td>
</tr>
<tr>
<td>Entering a Filing with Redacted Documents</td>
<td>100</td>
</tr>
<tr>
<td>Deleting a Redaction</td>
<td>104</td>
</tr>
<tr>
<td>Working with an Existing Redaction</td>
<td>105</td>
</tr>
<tr>
<td>Redaction Editor Toolbar</td>
<td>105</td>
</tr>
<tr>
<td>File into an Existing Case</td>
<td>108</td>
</tr>
<tr>
<td>Filing into an Existing Case from the Filing History Page</td>
<td>108</td>
</tr>
<tr>
<td>Filing into an Existing Case from the Case Search Page</td>
<td>112</td>
</tr>
<tr>
<td>Filing into an Existing Case from the Dashboard Page</td>
<td>116</td>
</tr>
<tr>
<td>Filing into a Non-Indexed Case</td>
<td>120</td>
</tr>
<tr>
<td>Creating a Service Only Filing</td>
<td>123</td>
</tr>
<tr>
<td>Service Contacts</td>
<td>125</td>
</tr>
<tr>
<td>Adding a New Service Contact</td>
<td>125</td>
</tr>
<tr>
<td>Adding a Service Contact from My Service Contact List to a Filing</td>
<td>127</td>
</tr>
<tr>
<td>Adding a Service Contact from a Public List to a Filing</td>
<td>128</td>
</tr>
<tr>
<td>Adding a New Service Contact to a Filing</td>
<td>130</td>
</tr>
<tr>
<td>Updating Information for an Existing Service Contact</td>
<td>132</td>
</tr>
<tr>
<td>Viewing Attached Case List of Service Contacts</td>
<td>133</td>
</tr>
<tr>
<td>Updating Information for a Case Service Contact</td>
<td>134</td>
</tr>
<tr>
<td>Deleting a Service Contact</td>
<td>136</td>
</tr>
<tr>
<td>Filings</td>
<td>138</td>
</tr>
<tr>
<td>Copying the Envelope</td>
<td>138</td>
</tr>
<tr>
<td>Viewing the Envelope Details</td>
<td>140</td>
</tr>
<tr>
<td>Resuming a Case Filing</td>
<td>141</td>
</tr>
<tr>
<td>Deleting a Draft Filing</td>
<td>142</td>
</tr>
<tr>
<td>Canceling a Filing</td>
<td>143</td>
</tr>
<tr>
<td>Bookmarks</td>
<td>145</td>
</tr>
<tr>
<td>Creating a Bookmark for a Case</td>
<td>145</td>
</tr>
<tr>
<td>Removing a Bookmark from a Case</td>
<td>145</td>
</tr>
<tr>
<td>Viewing a List of Bookmarked Cases</td>
<td>146</td>
</tr>
<tr>
<td>Reports</td>
<td>147</td>
</tr>
<tr>
<td>Creating a Report</td>
<td>147</td>
</tr>
<tr>
<td>Support and Feedback</td>
<td>149</td>
</tr>
<tr>
<td>Requesting Support</td>
<td>149</td>
</tr>
<tr>
<td>Zendesk Support</td>
<td>151</td>
</tr>
<tr>
<td>Providing Feedback</td>
<td>153</td>
</tr>
<tr>
<td>Tyler Technologies Technical Support Contact Information</td>
<td>155</td>
</tr>
</tbody>
</table>
List of Figures

Figure 1.1 – Dashboard Page ................................................. 3
Figure 1.2 – File into Existing Case Window—Includes Party Name Option ................................................. 3
Figure 1.3 – File into Existing Case Window—Excludes Party Name Option ................................................. 4
Figure 1.4 – Case Search Page with No Search Results Displayed .................................................. 4
Figure 1.5 – Filing History Page ............................................. 5
Figure 1.6 – Filing Drafts Page .............................................. 5
Figure 1.7 – Sample Bookmarks Page .................................................................................. 6
Figure 1.8 – Templates Page .................................................................................. 6
Figure 1.9 – Payment Accounts Page ........................................................................... 7
Figure 1.10 – My Information Page ........................................................................... 7
Figure 1.11 – Account Settings Page ........................................................................... 8
Figure 1.12 – Reports Page ................................................................................. 8
Figure 2.1 – The E-Filing Process ........................................................................... 9
Figure 3.1 – eFile Landing Page ........................................................................... 12
Figure 3.2 – Registration – Select Type Page .................................................................. 13
Figure 3.3 – Registration - User Information Page .................................................................. 13
Figure 3.4 – Registration - Firm/Contact Information Page ............................................. 14
Figure 3.5 – Example of Terms and Conditions ................................................................ 14
Figure 3.6 – Registration - Success Page ....................................................................... 15
Figure 3.7 – Reset Password Window ........................................................................ 15
Figure 3.8 – Reset Password Window – Complete Reset Process ..................................... 16
Figure 3.9 – Example of Password Reset Request Email .................................................. 16
Figure 3.10 – Account Settings Page ........................................................................ 17
Figure 3.11 – Sample My Information Page .................................................................. 18
Figure 4.1 – Sign In Page .................................................................................. 20
Figure 4.2 – SignOut Drop-Down List ........................................................................ 20
Figure 5.1 – Dashboard .................................................................................. 21
Figure 5.2 – Dashboard Page ............................................................................. 22
Figure 5.3 – Warning Message ............................................................................... 22
Figure 5.4 – Filing History Page ............................................................................. 23
Figure 5.5 – Filing Drafts Page ............................................................................... 23
Figure 5.6 – File into Existing Case Window—Includes Party Name Option .................... 24
Figure 5.7 – File into Existing Case Window—Excludes Party Name Option .................. 24
Figure 5.8 – Case Search Page with No Search Results Displayed .................................. 24
Figure 5.9 – Sample Bookmarks Page .................................................................... 25
Figure 5.10 – Templates Page ............................................................................. 25
Figure 6.1 – Payment Accounts Page ..................................................................... 26
Figure 6.2 – New Payment Account Window ............................................................. 27
Figure 6.3 – Payment Accounts Page ..................................................................... 27
Figure 6.4 – New Payment Account Window ............................................................. 28
Figure 6.5 – Enter Information Window ..................................................................... 28
Figure 6.6 – Payment Information Pane .................................................................... 29
Figure 6.7 – Verify Billing Information Pane ............................................................... 30
Figure 6.8 – Payment Accounts Page ..................................................................... 31
Figure 6.9 – New Payment Account Window ............................................................. 31
Figure 6.10 – Enter Information Window .................................................................. 32
Figure 6.11 – Payment Information Pane .................................................................. 33
Figure 6.12 – Verify Billing Information Pane .............................................................. 34
Figure 6.13 – Payment Accounts Page ..................................................................... 35
Figure 6.14 – Payment Accounts Page ..................................................................... 35
Figure 7.1 – Templates Page ............................................................................. 37
Figure 7.2 – Templates Pane ............................................................................. 38
Figure 7.3 – Sample Summary Page .................................................................38
Figure 7.4 – Templates Page ........................................................................39
Figure 7.5 – Templates Page ........................................................................40
Figure 7.6 – Filing History Page ..................................................................41
Figure 7.7 – Templates Matching Window ..................................................42
Figure 7.8 – Templates Page .........................................................................43
Figure 7.9 – More Options Drop-Down List ...............................................43
Figure 7.10 – Templates Page ......................................................................44
Figure 7.11 – More Options Drop-Down List ..............................................44
Figure 8.1 – Dashboard Page .......................................................................46
Figure 8.2 – Start Filing Pane ......................................................................46
Figure 8.3 – Upload Documents Page ..........................................................47
Figure 8.4 – Case Information Page .............................................................47
Figure 8.5 – Case Information Page .............................................................48
Figure 8.6 – Select Procedures / Remedies Window ....................................49
Figure 8.7 – Sample Completed Case Information Page ............................49
Figure 8.8 – Case Information Page .............................................................50
Figure 8.9 – Sample Case Information Page with the Case Cross Reference Type Section Displayed..........................................................................................................................................................50
Figure 8.10 – Example of a Case Information Page with Case Cross Reference Numbers Added.................................................................51
Figure 8.11 – Start Filing Pane ....................................................................52
Figure 8.12 – Upload Documents Page ..........................................................52
Figure 8.13 – Example of the Will Filed Field on the Case Information Page ..................................................................................................................53
Figure 8.14 – Personal Tab on the Parties Page .........................................54
Figure 8.15 – Address Tab on the Parties Page .........................................55
Figure 8.16 – Additional Identifiers Tab on the Parties Page ....................55
Figure 8.17 – Example of the Personal Tab on a Parties Page ....................56
Figure 8.18 – Start Filing Pane ....................................................................56
Figure 8.19 – Upload Documents Page ..........................................................57
Figure 8.20 – Attorneys Window .................................................................58
Figure 8.21 – Lead Attorney Window ............................................................58
Figure 8.22 – Example of the Address Tab on a Parties Page ....................59
Figure 8.23 – Example of the Additional Identifiers Tab on a Parties Page (Includes the Date of Death Field) ............................................................59
Figure 8.24 – Filings Page ...........................................................................60
Figure 8.25 – Sample Optional Services Tab ...............................................61
Figure 8.26 – Associate Parties to this Filing Window ..................................61
Figure 8.27 – Upload Documents Pane .......................................................62
Figure 8.28 – Select document(s) for Lead Document Window ................62
Figure 8.29 – Return Date Pane ..................................................................63
Figure 8.30 – Return Date Verified Message .............................................63
Figure 8.31 – Sample Return Date Pane with Valid Date Displayed ..........63
Figure 8.32 – Return Date Pane with Error Message Displayed ................64
Figure 8.33 – Dashboard Page ....................................................................64
Figure 8.34 – Start Filing Pane ....................................................................65
Figure 8.35 – Return Date Pane on the Summary Page ............................66
Figure 8.36 – Out of State Service Check Box Selected in the Return Date Pane ........................................................................................................66
Figure 8.37 – Return Date Verified Message .............................................66
Figure 8.38 – Sample Return Date Pane with Valid Date Displayed ..........67
Figure 8.39 – Return Date Pane ..................................................................67
Figure 8.40 – Sample Schedule Hearing Page ............................................68
Figure 8.41 – Dashboard Page .....................................................................69
Figure 8.42 – Start Filing Pane ....................................................................69
Figure 8.43 – Case Information Page ...........................................................70
Figure 8.44 – Parties Page ...........................................................................70
Figure 8.45 – Filings Page ...........................................................................71
Figure 8.46 – Service Page .........................................................................71
Figure 8.47 – Summary Page .......................................................................72
Figure 8.48 – Sample Schedule Hearing Page ............................................72
<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.49</td>
<td>– Filing History Page</td>
<td>73</td>
</tr>
<tr>
<td>8.50</td>
<td>– Sample Envelope Details Page</td>
<td>74</td>
</tr>
<tr>
<td>8.51</td>
<td>– Sample Schedule Hearing Page</td>
<td>74</td>
</tr>
<tr>
<td>8.52</td>
<td>– Filings Page</td>
<td>75</td>
</tr>
<tr>
<td>8.53</td>
<td>– Sample Optional Services Tab</td>
<td>76</td>
</tr>
<tr>
<td>8.54</td>
<td>– Associate Parties to this Filing Window</td>
<td>76</td>
</tr>
<tr>
<td>8.55</td>
<td>– Upload Documents Pane</td>
<td>77</td>
</tr>
<tr>
<td>8.56</td>
<td>– Select document(s) for Lead Document Window</td>
<td>77</td>
</tr>
<tr>
<td>8.57</td>
<td>– Fees Page</td>
<td>78</td>
</tr>
<tr>
<td>8.58</td>
<td>– Sample Ad Damnum Fees on the Fees Page</td>
<td>79</td>
</tr>
<tr>
<td>8.59</td>
<td>– Filings Page</td>
<td>80</td>
</tr>
<tr>
<td>8.60</td>
<td>– Sample Motion Type Drop-Down List</td>
<td>80</td>
</tr>
<tr>
<td>8.61</td>
<td>– Sample Optional Services Tab</td>
<td>81</td>
</tr>
<tr>
<td>8.62</td>
<td>– Associate Parties to this Filing Window</td>
<td>81</td>
</tr>
<tr>
<td>8.63</td>
<td>– Upload Documents Pane</td>
<td>82</td>
</tr>
<tr>
<td>8.64</td>
<td>– Select document(s) for Lead Document Window</td>
<td>82</td>
</tr>
<tr>
<td>8.65</td>
<td>– Example of a Filings Page with a Motion Filing Code Selected</td>
<td>83</td>
</tr>
<tr>
<td>8.66</td>
<td>– Filings Page</td>
<td>84</td>
</tr>
<tr>
<td>8.67</td>
<td>– Sample Optional Services Tab</td>
<td>84</td>
</tr>
<tr>
<td>8.68</td>
<td>– Associate Parties to this Filing Window</td>
<td>85</td>
</tr>
<tr>
<td>8.69</td>
<td>– Upload Documents Pane</td>
<td>86</td>
</tr>
<tr>
<td>8.70</td>
<td>– Select document(s) for Lead Document Window</td>
<td>86</td>
</tr>
<tr>
<td>8.71</td>
<td>– Fees Page</td>
<td>87</td>
</tr>
<tr>
<td>8.72</td>
<td>– Sample Claim Amount Fees on the Fees Page</td>
<td>88</td>
</tr>
<tr>
<td>8.73</td>
<td>– Filings Page</td>
<td>88</td>
</tr>
<tr>
<td>8.74</td>
<td>– Sample Optional Services Tab</td>
<td>89</td>
</tr>
<tr>
<td>8.75</td>
<td>– Associate Parties to this Filing Window</td>
<td>90</td>
</tr>
<tr>
<td>8.76</td>
<td>– Upload Documents Pane</td>
<td>90</td>
</tr>
<tr>
<td>8.77</td>
<td>– Select document(s) for Lead Document Window</td>
<td>91</td>
</tr>
<tr>
<td>8.78</td>
<td>– Fees Page</td>
<td>92</td>
</tr>
<tr>
<td>8.79</td>
<td>– Sample Estate Value Fees on the Fees Page</td>
<td>93</td>
</tr>
<tr>
<td>8.80</td>
<td>– Fees Page</td>
<td>93</td>
</tr>
<tr>
<td>8.81</td>
<td>– Select Party Responsible For Fees Window</td>
<td>94</td>
</tr>
<tr>
<td>8.82</td>
<td>– Example of a Fees Page with the Filing Fees Displayed</td>
<td>94</td>
</tr>
<tr>
<td>8.83</td>
<td>– Sample Optional Services Tab</td>
<td>95</td>
</tr>
<tr>
<td>8.84</td>
<td>– Select Party Responsible For Fees Window</td>
<td>96</td>
</tr>
<tr>
<td>8.85</td>
<td>– Example of a Fees Page with the Filing Fees Displayed</td>
<td>96</td>
</tr>
<tr>
<td>8.86</td>
<td>– Submission Agreements Pane – One Disclaimer</td>
<td>97</td>
</tr>
<tr>
<td>8.87</td>
<td>– Submission Agreements Pane with the Check Box Selected – One Disclaimer</td>
<td>97</td>
</tr>
<tr>
<td>8.88</td>
<td>– Submission Agreements Pane – Two Disclaimers</td>
<td>97</td>
</tr>
<tr>
<td>8.89</td>
<td>– Submission Agreements Pane with the Check Boxes Selected – Two Disclaimers</td>
<td>98</td>
</tr>
<tr>
<td>8.90</td>
<td>– Submission Agreements – No Disclaimers</td>
<td>98</td>
</tr>
<tr>
<td>8.91</td>
<td>– Sample Summary Page</td>
<td>98</td>
</tr>
<tr>
<td>8.92</td>
<td>– Unused Documents Message</td>
<td>98</td>
</tr>
<tr>
<td>9.1</td>
<td>– Start Filing Pane</td>
<td>101</td>
</tr>
<tr>
<td>9.2</td>
<td>– Upload Documents Page—Blank</td>
<td>101</td>
</tr>
<tr>
<td>9.3</td>
<td>– Upload Documents Page with an Uploaded Document</td>
<td>101</td>
</tr>
<tr>
<td>9.4</td>
<td>– Example of a Message for a Completed Redaction</td>
<td>102</td>
</tr>
<tr>
<td>9.5</td>
<td>– Sample Summary Page</td>
<td>103</td>
</tr>
<tr>
<td>9.6</td>
<td>– Example of a Message with Redaction in Progress</td>
<td>103</td>
</tr>
<tr>
<td>9.7</td>
<td>– Annotation Notes Dialog Box</td>
<td>104</td>
</tr>
<tr>
<td>9.8</td>
<td>– Delete Annotation? Dialog Box</td>
<td>104</td>
</tr>
<tr>
<td>9.9</td>
<td>– Sample Thumbnail Pane</td>
<td>107</td>
</tr>
<tr>
<td>10.1</td>
<td>– Filing History Page</td>
<td>109</td>
</tr>
<tr>
<td>10.2</td>
<td>– Associate Parties to this Filing Window</td>
<td>110</td>
</tr>
<tr>
<td>10.3</td>
<td>– Upload Documents Pane</td>
<td>110</td>
</tr>
<tr>
<td>10.4</td>
<td>– Select document(s) for Lead Document Window</td>
<td>111</td>
</tr>
<tr>
<td>10.5</td>
<td>– File into Existing Case Window—Includes Party Name Option</td>
<td>112</td>
</tr>
<tr>
<td>10.6</td>
<td>– File into Existing Case Window—Excludes Party Name Option</td>
<td>113</td>
</tr>
</tbody>
</table>
About This Guide

The purpose of this user guide is to provide users with details on how to use a product or a feature or functionality within the product.

User guides may include the following elements:

- User interface (dialog boxes and pages)
- Reports
- Tools

Audience

This document is intended for the following personas:

- Clients
- Tyler Client Services

Documentation Conventions

The format style applied to text enables readers to quickly determine the nature of information or an action they are to take.

<table>
<thead>
<tr>
<th>Text Style</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bold</strong></td>
<td>Shorthand notation for a menu, menu item, optional cascading menu, or selected tab</td>
<td>On the Main Menu, click <strong>Tools</strong> → <strong>Options</strong> → <strong>Forms</strong>.</td>
</tr>
<tr>
<td></td>
<td>Objects to click or select, including buttons, check boxes, options in a drop-down list, elements, fields, and section header name</td>
<td>Click <strong>License Key Editor</strong>.</td>
</tr>
<tr>
<td><strong>Fixed-Width</strong></td>
<td>User interface (UI) input typed exactly as shown</td>
<td>Type the value <strong>Boston</strong> in the <em>City</em> field.</td>
</tr>
<tr>
<td></td>
<td>Server names, file names, path names, application programming interface (API) names, XML settings in configuration files, databases, command names, system calls, and data structures and types</td>
<td>Run the <em>tables.sql</em> script for the <em>jcpBasketB</em> database.</td>
</tr>
<tr>
<td><strong>Italics</strong></td>
<td>Page and dialog box names, Document titles, Variable data to be replaced by an appropriate value</td>
<td>Return to the <strong>Home</strong> page.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Refer to the <strong>Navigation Guide</strong>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Type the <em>filename</em>.</td>
</tr>
<tr>
<td>“Quotation marks”</td>
<td>Chapter within a document, Rights on a role, Job tasks within a job definition</td>
<td>Refer to the “Logic Rules” chapter.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Feature requires the “Print the Event Listing Report” right.</td>
</tr>
</tbody>
</table>

Documentation Notes

Each documentation note provides information or action items regarding that area of the document.
<table>
<thead>
<tr>
<th>Icon</th>
<th>Note Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Note Icon" /></td>
<td>Note</td>
<td>Notes provide extra details about a topic or step.</td>
</tr>
<tr>
<td><img src="image" alt="Caution Icon" /></td>
<td>Caution</td>
<td>Caution messages indicate that a specific action could cause an error in the system.</td>
</tr>
<tr>
<td><img src="image" alt="Warning Icon" /></td>
<td>Warning</td>
<td>Warning messages indicate that a specific action could cause an interruption of service.</td>
</tr>
<tr>
<td><img src="image" alt="Danger Icon" /></td>
<td>Danger</td>
<td>Danger messages indicate that a specific action could damage the database infrastructure or hardware.</td>
</tr>
</tbody>
</table>
System Overview

Topics covered in this chapter

♦ Before You Begin

The Odyssey® File & Serve™ system enables registered users to file documents with the court anytime, anywhere, 24 hours a day, seven days a week. This highly automated, scalable system provides clients the opportunity to transition from an inefficient, paper-based process to a streamlined, technology-based electronic filing (e-filing) system.

Before You Begin

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

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

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

System Requirements

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

• Browser Requirements—The system supports Chrome™; Mozilla® Firefox®; Microsoft® Edge®; or Safari® application programs. If your browser does not meet these minimum requirements, please contact your network administrator.
  
  Note: Internet Explorer® is not a supported browser and may not work as expected.

• Operating Systems—The system supports Microsoft® Windows®, Linux®, Chrome OS™, Android™, iOS, and OS X® desktop class operating system software.

• Minimum Hardware Requirements—The system supports the following hardware:
  – Intel® Core™ Duo processors or Advanced Micro Devices, Inc. (AMD) processors manufactured in 2012 or later
  – 2 gigabytes (GB) of random-access memory (RAM)
  – 1366 x 768 resolution screens for desktop computers, or 1280 x 720 resolution screens for mobile devices

• Recommended Hardware Requirements—Tyler recommends the following hardware:
  – Intel® Core™ i3 or AMD A6 processors with at least a 2.0 GHz clock speed
  – 4 GB of RAM
  – 1920 x 1080 resolution for both desktop computers and mobile devices

• Connection Requirements—A high-speed Internet connection is recommended.

• Document Format—Adobe® PDF is the only format allowed for attaching documents.
Page Navigation

The following section describes how to navigate the system and populate data fields throughout the filing process.

Using the Mouse
You can use the mouse to move from field to field on a page, as well as to make selections from drop-down lists in a field. When you have completed the required fields on a specified page, you can save your entries and move to the next page by clicking the navigation button in the lower right corner of the page. If you skipped a required field on that page, the system prompts you to enter data in that field before moving to the next page.

Using the Keyboard
As you complete the pages for your filing, you can navigate from one field to the next by pressing TAB. When you have completed the required fields on a specified page, you can save your entries and move to the next page by pressing TAB after the last field.

Error Messages
The system displays several error messages to alert you when you have not entered required information or you have entered invalid information.

Enter Data in Required Fields
Required fields are indicated by a red asterisk. If you have not entered information in the required fields, you will receive error messages when you try to advance to the next page.

Note: Required fields may vary in different sections.

Orientation
When you sign in to Odyssey File & Serve, the Dashboard page is displayed. From here, you can select various filing options.

Dashboard Page
From the Dashboard page, you can start a filing, access your filing history, access your draft filings, perform a case search, access the cases you have bookmarked, and access your saved templates.
Case Search

On the Dashboard menu, click **Case Search**. From here, you can search for an existing case or file into an existing case. Advanced search features are available if you search by either a party name or a business name.

Note: Your system may be configured to only search by case number. With this optional configuration, the Party Name option is not displayed.
If your search does not produce any results, click to return to the Dashboard page.

Filing History
On the Dashboard menu, click Filing History. From here, you can view your filing history. You can also view the details for a specified case, file into an existing case, or view the service contacts attached to the case.
Filing Drafts

On the Dashboard menu, click **Filing Drafts**. From here, you can view a list of your draft filings, resume a draft filing, delete a draft filing, or file into an existing case.

Bookmarks

On the Dashboard menu, click **Bookmarks**. From here, you can access the cases that you have bookmarked. You can file into an existing case, view the service contacts attached to the case, file into the case with a template, or remove the bookmark from the case.
Templates
On the Dashboard menu, click Templates. From here, you can access the templates that you previously created. You can use a template to create a new case filing, edit an existing template, copy a template, or delete a template.

My Payment Accounts
On the Dashboard menu, click My Payment Accounts. From here, you can view your existing payment accounts, add a new payment account, edit an existing account, or delete an existing account.
My Service Contacts

On the Dashboard menu, click **My Service Contacts**. From here, you can view your service contacts, add a new service contact, edit an existing service contact, view the attached cases for a specified service contact, or delete a service contact.

My Information

On the Dashboard menu, click **My Information**. From here, you can view or edit your personal information.

Account Settings

On the Dashboard menu, click **Account Settings**. From here, you can change your system password.
Reports

On the Dashboard menu, click Reports. From here, you can generate a report that can be used to reconcile financial transactions for envelopes and filings that you submitted.
E-Filing Overview

Topics covered in this chapter
♦ Filing Queue Status

This section describes the e-filing process.

The E-Filing Process

Figure 2.1 – The E-Filing Process

Once a user has registered to use Odyssey® File & Serve™, he or she can electronically submit documents (referred to as “filings”) to the court. When the user submits the filing, 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 rejected, an email is sent to the filer with a reason for the rejection. In addition, a status of Rejected is displayed on the Filing History page.

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

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

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

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

<table>
<thead>
<tr>
<th>Status</th>
<th>Filing Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>EFO, EFS, SO</td>
<td>The filer has entered full or partial filing data, but has not yet submitted the filing.</td>
</tr>
<tr>
<td>Submitting</td>
<td>EFO, EFS, SO</td>
<td>The filer has submitted the filing, and all of the data is being verified.</td>
</tr>
<tr>
<td>Submitted</td>
<td>EFO, EFS, SO</td>
<td>The filing was submitted successfully and is in the Review Queue, but the clerk has not yet started the review. The filer can cancel one or more filings that are in this status.</td>
</tr>
<tr>
<td>Court Processing</td>
<td>EFO, EFS, SO</td>
<td>Some additional action needs to be taken by the court.</td>
</tr>
<tr>
<td>Under Review</td>
<td>EFO, EFS</td>
<td>A clerk reviewer has selected a filing from a queue.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> 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.</td>
</tr>
<tr>
<td>Receipted</td>
<td>EFO, EFS</td>
<td>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 workflow.</td>
</tr>
<tr>
<td>Accepted</td>
<td>EFO, EFS</td>
<td>The reviewer has reviewed the filing and accepted it.</td>
</tr>
<tr>
<td>Rejected</td>
<td>EFO, EFS</td>
<td>The reviewer has reviewed the filing and rejected it.</td>
</tr>
<tr>
<td>Returned</td>
<td>EFO, EFS</td>
<td>The reviewer has reviewed and returned the filing because the filer must take additional action.</td>
</tr>
<tr>
<td>Served</td>
<td>SO</td>
<td>Service Only filings are completed.</td>
</tr>
<tr>
<td>Status</td>
<td>Filing Type</td>
<td>Definition</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Service Incomplete (Service Only filings)</td>
<td>SO</td>
<td>One or more servings failed; the service was incomplete. Example: The email or domain was rejected.</td>
</tr>
<tr>
<td>Canceled</td>
<td>EFO, EFS, SO</td>
<td>The filer has canceled the filing. The filer can cancel only draft and submitted filings.</td>
</tr>
<tr>
<td>Submission Failed</td>
<td>EFO, EFS</td>
<td>A file format or billing error has occurred when the filer submitted the filing. Failure specifics are available on the Details page, and the filer is notified of the specifics through email.</td>
</tr>
</tbody>
</table>
Landing Page

Topics covered in this chapter
♦ Registering as an Individual Filer
♦ Resetting Your Password
♦ Changing the User Password
♦ Updating User Information

The Landing page serves as the gateway to the system. From this page, you can register or sign in to the application.

Figure 3.1 – eFile Landing Page

Registering as an Individual Filer

You can register as an individual filer if you are a single user of the system. The term “single user” refers to a user who is neither associated with nor represented by any firm.

Note: Refer to your local court’s website before registering as an individual filer, as registration options may vary.

To register as an individual filer, perform the following steps:

1. On the Landing page, click REGISTER.

   The Registration - Select Type page is displayed.

   Note: There is no fee to sign up for e-filing.
2. Click [Individual].

   The Registration - User Information page is displayed.

3. Complete the required fields, and then click NEXT.

   The Registration - Firm/Contact Information page is displayed.

4. Complete the address and phone number fields.
5. Select the **I agree to the Terms and Conditions** check box.

**Note:** Tyler recommends that you click the link to read the Terms and Conditions before selecting the check box. The Terms and Conditions are displayed in a separate tab in your browser. After you have read the Terms and Conditions, close the tab and return to the Registration page.

6. After you have completed all fields and selected the **I agree to the Terms and Conditions** check box, click **Submit**.

The **Registration - Success** page is displayed.
7. Check your inbox for the activation email from Odyssey File & Serve.

   **Note:** You must verify your email address to complete the registration process. A verification email (from Odyssey File & Serve) will be sent to you. Open the email and click the link to confirm your email address. If you do not see the email in your inbox, check your junk mail folder for the email.

   After you verify your email address, your registration is complete. You can now navigate to the eFile Landing page to sign in.

### Resetting Your Password

To reset your password, perform the following steps:

1. On the Odyssey File & Serve Landing page, click **I FORGOT MY PASSWORD**.

   The Reset Password window is displayed.

   ![Reset Password Window](image)

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

3. Select the **I'm not a robot** check box.

   A window is displayed from which you must select specified images.

4. Click the requested images, and then click **VERIFY**.

   **Note:** If you do not select the correct images, a new window is displayed, from which you can try again.
5. After selecting the correct images, click.

A new Reset Password window is displayed, directing you to check your email to complete the password reset process.

![Reset Password Window](image)

**Figure 3.8 – Reset Password Window – Complete Reset Process**

6. Check your email inbox.

7. Locate the email from Odyssey File & Serve.

![Password Reset Request Email](image)

**Figure 3.9 – Example of Password Reset Request Email**

8. Click the link that is labeled here to reset your password.

   You are prompted to create a new password.

9. Type a new password in the New Password field.

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

10. Retype your new password in the Repeat New Password field.

11. Click Change Password.

   A confirmation page displays the following message: Your password has been changed successfully.
Changing the User Password

You can change your password on the Account Settings page.

To change your password, perform the following steps:


   The Account Settings page is displayed.

![Account Settings Page](image)

Figure 3.10 – Account Settings Page

2. Type the old password in the Old Password field.
3. Type the new password in the New Password field.

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

4. Retype the new password in the Re-enter New Password field.

5. Click **Save**.

   Your password is changed.

Updating User Information

You can update your personal information.

To update your personal information, perform the following steps:

1. On the Dashboard menu, click My Information.

   The My Information page is displayed.
2. Update any information as needed, and then click **SAVE**.
Topics covered in this chapter

♦ Signing In
♦ Signing Out

All users are required to sign in to Odyssey File & Serve to be able to e-file and e-serve documents or to check the status of an existing filing. It is also a best practice for users to sign out after they have completed their transactions.

Signing In

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

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

To sign in, perform the following steps:

1. Navigate to the Odyssey File & Serve Landing page.

2. Click .

3. Type your email address and password (which is case-sensitive).
4. Click **Sign In**.

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

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

### Signing Out

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

To sign out of the application, perform the following steps:

1. From the drop-down list at the top of the page, click **Sign Out**.

You are now signed out of the application.
5 Dashboard

Topics covered in this chapter

♦ Dashboard Page

The Dashboard provides a drop-down menu for filer actions.

Figure 5.1 – Dashboard

From here, you can perform the following actions:

- Access the Dashboard page to start a filing, perform a case search, view your filing history, view your draft filings, access the cases you have bookmarked, and access the templates you have created.
- File into an existing case on the Case Search page.
- Access the Filing History page to view a list of your case filings.
- Access the Filing Drafts page to view a list of your draft filings.
- Access the Bookmarks page to view a list of cases that you have bookmarked for quick access.
- Access the Templates page to locate an existing template and quickly begin a new case filing.
- Access the Payment Accounts page to set up and manage payment accounts.
- Access the Service Contacts page to add and manage your service contacts list.
- View and update your profile information on the My Information page.
- Access the Account Settings page to change your password.
- Access the Reports page to generate reports for envelopes and filings that you submitted.
Dashboard Page

From the *Dashboard* page, you can start a new filing, perform a case search, access your filing history, access your draft filings, view cases that you have bookmarked, and locate an existing template or create a new template to use in a new case filing.

![Dashboard Page](image)

**Figure 5.2 – Dashboard Page**

**Account Setup**

The first time that you access the *Dashboard* page, a warning message is displayed directing you to set up a payment account. The message continues to be displayed every time that you access the *Dashboard* page until you have set up a payment account.

![Warning Message](image)

**Figure 5.3 – Warning Message**

**Start Filing**

Click **START FILING** to start a new case filing or to file into an existing case.

**Note:** While you are entering a case filing, click **** to view the case number or draft number.
Filing History

Click See Filing History to access the Filing History page. From here, you can view the status of your filing, check the filing type, get a document description, see the number assigned to your case, review the details of the case, view the service contacts attached to a case, and cancel a filing.

Figure 5.4 – Filing History Page

Drafts

Click View My Drafts to access the Filing Drafts page. From here, you can view your draft filings, resume a filing, or cancel a draft filing.

Figure 5.5 – Filing Drafts Page

Case Search

Click Search Cases to search for a case in the system. From here, you can search for an existing case or file into an existing case. Advanced search features are available if you search by either a party name or a business name.
Note: Your system may be configured to only search by case number. With this optional configuration, the Party Name option is not displayed.

If your search does not produce any results, click \( \text{Dashboard} \) to return to the Dashboard page.

Bookmarks

Click Bookmarks to access a list of cases that you have bookmarked for quick access.
Templates

Click **Templates** to locate a template to use in your case filing or to create a new template for future use.
6 Payment Accounts

Topics covered in this chapter
♦ Adding a Waiver Payment Account
♦ Adding a Credit Card Payment Account
♦ Adding an E-Check Payment Account
♦ Editing a Payment Account
♦ Deleting a Payment Account

You must set up a payment account before you can submit a filing to the court.

You can set up a payment account from the Dashboard menu. Click My Payment Accounts. The Payment Accounts page opens. On that page, you can manage your payment accounts. You can add a new account, edit an existing account, or delete an existing account.

Adding a Waiver Payment Account

To set up a waiver payment account, perform the following steps:

   
   The Payment Accounts page is displayed.

   ![Figure 6.1 – Payment Accounts Page](image)

2. Click

   A new pane is displayed.
3. Type a name for the payment account in the **Account Name** field.

4. Select the **Waiver** option, and then click **Create Waiver**.

   The new account is added to the list of your other payment accounts.

**Adding a Credit Card Payment Account**

To set up a credit card payment account, perform the following steps:

1. On the Dashboard menu, click **My Payment Accounts**.

   The **Payment Accounts** page is displayed.

2. Click **Add Account**.

   A new pane is displayed.
3. Type a name for the payment account in the **Account Name** field.

4. Select the **Credit Card or Bank Account** option, and then click **Enter Information**.
   
   The *Enter Information* window is displayed.

5. Select the **Credit Card** option.
   
   The Payment Information pane is displayed.
6. Select the card type from the **Card Type** drop-down list.

7. Type the card number in the **Card Number** field.

8. Type the expiration month of the credit card in the **Exp Month** field.

9. Type the year the credit card expires in the **Exp Year** field.

10. Type the CVV code in the **CVV Code** field.

11. Type the cardholder’s name in the **Name on Card** field.

12. Select the address type, and then complete the required address fields.

13. After completing all of the required fields, click **Continue**.

    The Verify Billing Information pane is displayed.
Figure 6.7 – Verify Billing Information Pane

14. Review the information you have entered. If it is correct, click **Save Information**. If it is not correct, click **Back** and make any necessary changes.

The new account is added to the list of your other payment accounts.

## Adding an E-Check Payment Account

**Note**: Your court may not accept e-check payment accounts. The ability to use an e-check account is configured by Tyler and may not be available on your system.

To set up an e-check payment account, perform the following step:

1. On the Dashboard menu, click **My Payment Accounts**.

The **Payment Accounts** page is displayed.
2. Click ![ADD ACCOUNT]

A new pane is displayed.

3. Type a name for the payment account in the **Account Name** field.

4. Select the **Credit Card or Bank Account** option, and then click ![ENTER INFORMATION]

The *Enter Information* window is displayed.
5. Select the **e-Check** option.

   The **Payment Information pane** is displayed.
6. Select the account type from the **Account Type** drop-down list.
7. Type your account number in the **Account Number** field.
8. Type the bank routing number in the **Routing Number** field.
9. Type your name in the **Name on Account** field.
10. Select the address type, and then complete the required address fields.
11. After completing all of the required fields, click **Continue**.

   The Verify Billing Information pane is displayed.
12. Review the information you have entered. If it is correct, click **Save Information**. If it is not correct, click **Back** and make any necessary changes.

The new bank account is added to the list of your other payment accounts.

**Editing a Payment Account**

After you have set up a payment account, you can change the status of the account from active to inactive. You can also change the name of the account.

**Note:** If you need to change any other information in the payment account, you cannot edit it. You must delete the account and then add it back with the new information.

To change the status or the name of an existing payment account, perform the following steps:

1. On the Dashboard menu, click **My Payment Accounts**.

The **Payment Accounts** page is displayed.
2. Locate the payment account for which you want to change the status or the name, and then click

   Note: If the current status of the specified account is active, the Active check box is selected.

3. To change the status to inactive, clear the check box. If you want to change the name of the account, type the new name. Then, click

   The status of the payment account changes to Inactive. If you changed the name, the new name is displayed.

4. To return the payment account to active status, click, and then select the Active check box.

   Then, click

   The status of the payment account changes back to Active status.

Deleting a Payment Account

You can delete an existing payment account that you no longer want. If you need to make changes to an existing payment account, you must delete it and then add it back.

To delete an existing payment account, perform the following steps:


   The Payment Accounts page is displayed.

2. Locate the payment account that you want to delete, and then click

The warning message is displayed: Are you sure you want to delete the payment account “xyz”?

3. Click **OK** to delete the account, or click **Cancel** to cancel the action.

If you clicked **OK**, a confirmation message is displayed, and the account is deleted.
7 Templates

Topics covered in this chapter
♦ Adding a Template
♦ Editing a Template
♦ Using a New Case Template
♦ Using an Existing Case Template
♦ Copying a Template
♦ Deleting a Template

Templates allow you to start a new case from a template that you have created, saving you time.

Adding a Template

To add a template that you can use to quickly start a new case or file into an existing case, perform the following steps:

1. On the Dashboard menu, click Templates.
   
   The Templates page is displayed.

   ![Figure 7.1 – Templates Page](image)

2. Click

   A pane is displayed.
3. Type a name for the template in the Name field.

4. Select either the New Case or the Existing Case option.

5. Select the Favorite check box if you want to designate this template as a favorite.

6. Click to begin creating your template.

   The Case Information page is displayed.

7. Enter as much information on this page as you want to use in your template.

8. Continue entering information on each page of the filing until you have the information that you want to use in your template.

   **Note:** You can stop at any time and save the pages that you have completed. You do not have to create an entire case filing to save the entries as a template.

9. If you enter information on each page of the case filing, on the Summary page, click .

   The Templates page is displayed. The template you just created is added to the list of other templates. The new template is also displayed on the Dashboard page.
Editing a Template

You can edit an existing template if you need to make changes to it.
To edit an existing template, perform the following steps:

1. On the Dashboard menu, click **Templates**.
   - The **Templates** page is displayed.

2. Locate the template that you want to edit, and then click **Edit**.
   - The template name is displayed in a separate pane.
   - **Note:** You can change the template name if you want.

3. Click **Edit Details**.
   - The **Case Information** page is displayed. Any information that you previously entered on this page remains.

4. Make any changes that you want on the **Case Information** page.

5. If you entered information on any other pages in your template, make changes as needed to those pages. Then click **Save and Exit**.
   - Your template is now updated and is listed on the **Templates** page and on the **Dashboard** page.
Using a New Case Template

After a template has been created, you can use it to accelerate your filing. To use a template that you previously created, perform the following steps:

1. On the Dashboard menu, click Templates.
   The Templates page is displayed.

2. Locate the template that you want to use, and then click.
   The Case Information page is displayed. All of the information that you entered when you created the template is auto-filled.

3. Enter the remaining required information for the new case until you reach the Summary page.

4. Review the summary of the case filing. After you are satisfied with the information in your filing, click submit.
   The new case filing is displayed on the Filing History page.

Using an Existing Case Template

After a template has been created, you can use it to accelerate your filing when filing into an existing case. To access an existing case template, perform the following steps:

1. On the Dashboard menu, click Filing History.
   The Filing History page is displayed.
2. Locate the case that you want to file into, and then click ![image](image.png).

   A drop-down list is displayed.

3. Click **File Into Case With Template**.

   The *Templates Matching* window is displayed, along with a list of available templates.
4. Locate the template that you want to use for the case you are filing into, and then click Use.

   The template that you selected is displayed on the Upload Documents page. The fields that you previously entered when the template was created are auto-filled.

5. Enter the remaining required information for the new case until you reach the Summary page.

6. Review the summary of the case filing. After you are satisfied with the information in your filing, click Submit.

   The new case filing is displayed on the Filing History page.

**Copying a Template**

You can copy an existing template, assign a new name to the template, and then save it under the new name. Once the new template is created, you can make changes as necessary to it. The original template remains unchanged.

To copy an existing template, perform the following steps:

1. On the Dashboard menu, click Templates.

   The Templates page is displayed.
2. Locate the template that you want to copy, and then click .

A drop-down list is displayed.

3. Click Copy Template.

The template name is displayed in a separate pane with “Copy” as part of the name.

4. Rename the template to a different name.

5. Select the Favorite check box if you want to designate this template as a favorite.

6. Click if you want to save the template as is with the new name. Or, click to make changes to the template.

When you are done saving the new template, it is displayed on the Templates page with your other templates.

Deleting a Template

You can delete a template that you no longer need.

To delete an existing template, perform the following steps:

1. On the Dashboard menu, click Templates.

The Templates page is displayed.
2. Locate the template that you want to delete, and then click.

   A drop-down list is displayed.

   ![More Options Drop-Down List](image)

3. Click **Delete Template**.

   The following warning message is displayed: Are you sure you want to delete the template “xyz”?

4. Click **OK** to delete the template, or click **Cancel** to cancel the action.

   If you clicked **OK**, a confirmation message is displayed, and the template is deleted.
You can initiate a case from the Dashboard page by clicking . This action begins the case initiation process for e-filing. From here, you can start a new case or file into an existing case.

Note: While you are entering a case filing, click to view the case number or draft number.
Uploading Documents for a New Case Filing

You can upload your lead document and any attachments before you enter the filing information.

To upload your documents, perform the following steps:

1. On the Dashboard page, click [START FILING].

   The Start Filing pane is displayed.

   ![Figure 8.2 – Start Filing Pane](image)

2. Click [START A NEW CASE].

   The Upload Documents page is displayed.

   ![Figure 8.2 – Start Filing Pane](image)

   Note: While you are entering a case filing, click [Information] to view the case number or draft number.
3. Click to look for the documents that you want to upload.

   Note: The types of documents that can be uploaded are based on the configuration.

4. Select each document to be uploaded.

5. Click to continue with your filing.

   The Case Information page is displayed.

   Note: Your document will continue to upload as you proceed through the case filing.

**Entering Case Information**

Before you can file a new case, you must set up a payment account.

**Note:** At any time while the Case Information page is displayed, you can click to begin uploading your documents. You will be prompted to upload your documents when you are entering information on the Filings page.

**Note:** While you are entering a case filing, click to view the case number or draft number.

To enter case information, perform the following steps:

1. On the Case Information page, select the location from the Location drop-down list.

2. Select the case category from the Case Category drop-down list.
3. Select the case type from the **Case Type** drop-down list.

4. Select the case subtype, if applicable, from the **Case Sub Type** drop-down list.

5. Click to save your work and continue, or click to save your work and exit the filing.

### Entering Case Information for a Civil Case

**Note:** The Procedures/Remedies and Damage Amount features are configured by Tyler and may not be available on your system.

Before you can file a new case, you must set up a payment account.

**Note:** At any time while the Case Information page is displayed, you can click to begin uploading your documents. You will be prompted to upload your documents when you are entering information on the Filings page.

**Note:** While you are entering a case filing, click to view the case number or draft number.

To enter case information, perform the following steps:

1. On the Case Information page, select the location from the **Location** drop-down list.

2. Select **Civil** from the **Case Category** drop-down list.

![Figure 8.5 – Case Information Page](image)

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

4. Select the case subtype, if applicable, from the **Case Sub Type** drop-down list.

5. Click .

The Select Procedures / Remedies window is displayed.
6. Select the appropriate Procedure / Remedy, and then click **SAVE**.

7. Select the amount of damages you are seeking from the **Damage Amount** drop-down list.

8. Click **PARTIES** to save your work and continue, or click **SAVE AND EXIT** to save your work and exit the filing.

**Filing a New Case with Case Cross References**

You can include case cross references in your case filing if the feature is configured on your node.

**Note:** The Case Cross Reference number feature is configured by Tyler and may not be available on your system.
To file a new case that uses case cross references, perform the following steps:

1. On the Case Information page, select the location from the Location drop-down list.
2. Select Civil from the Case Category drop-down list.
3. Select the appropriate case type from the Case Type drop-down list.
4. Select the case subtype, if applicable, from the Case Sub Type drop-down list.
5. Select the damages amount, if applicable, from the Damages Amount drop-down list.
6. In the Case Cross Reference Type section, type the six-digit case cross reference number in the Case Cross Reference Id field.

7. If you have additional case cross reference numbers to add, click Add Case Cross Reference. A blank row in the Case Cross Reference Type section is displayed.
8. Select the appropriate option from the Case Cross Reference Type drop-down list. Then, type the six-digit case cross reference number in the Case Cross Reference Id field.

**Note:** If any case cross reference numbers are required, the Case Cross Reference Type(s) will be auto-populated.

9. Continue adding case cross reference numbers until you are done.
10. Click to save your work and to continue, or click to save your work and to exit the filing.

**Filing a New Case with a Will Filed Date**

You can file a new case and enter the date on which the will was filed with the court.

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

To file a new case and enter the date on which the will was filed, perform the following steps:

   
   The Start Filing pane is displayed.
2. Click  to view the case number or draft number.

Note: While you are entering a case filing, click to view the case number or draft number.

3. Click  to look for the documents that you want to upload.

Note: The types of documents that can be uploaded are based on the configuration.

4. Select each document to be uploaded.

5. Click  to continue with your filing.

Note: Your document will continue to upload as you proceed through the case filing.

The Case Information page is displayed.
6. Select the location from the **Location** drop-down list.

7. Select the category from the **Case Category** drop-down list.

   **Note:** In the example, “Probate or Mental Health” is selected.

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

   **Note:** In the example, “Probate of Will” is selected.

   **Note:** The category and case type that you select determine which fields will be displayed next.

9. Select the case subtype from the **Case Sub Type** drop-down list.

   **Note:** The items in this list are determined by the case type you selected.

10. Type a date in the **Will Filed Date** field, or click the calendar to select a date from the calendar.

    **Note:** The Will Filed Date feature is configured by Tyler and may not be available on your system.

11. Click **Save and Exit** to save your work and to continue, or click **Save and Exit** to save your work and to exit the filing.
Entering Party Details

Each case requires a party type.

Figure 8.14 – Personal Tab on the Parties Page

Note: While you are entering a case filing, click to view the case number or draft number.

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

1. On the Personal tab, select the Person or Entity option.
2. Complete the First Name, Middle Name (if applicable), and Last Name fields. If you are the first party, click . Also, if appropriate, select the party’s suffix from the Suffix drop-down list. Your name will be entered in the fields.
3. Type the party case management system ID in the Party CMS ID field, if appropriate.
4. Select a language from the Interpreter drop-down list, if appropriate.
5. Select Pro Se for the filing attorney.
6. Click to enter the address information for the first party.
7. Enter the country, address, city, state, ZIP code, and phone number for the first party.

8. Click to add more information for the specified party.

9. Type the party’s date of birth in the Date of Birth field, or click to select the date from the calendar.

10. Click to enter information for the other required party.

11. Complete all of the required fields for the second party.

12. If you have another party to add to the case, click . Continue to add parties until all parties have been added to the case.

13. Click to save your work and to continue.

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the Dashboard page. In the Drafts pane, click View My Drafts. Locate the specified draft, and then click .
Entering Date of Death on Parties Page

You can enter the date of death for a party when the feature is configured on your system.

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

Note: Your screens may vary from the examples provided.

To enter the date of death on the Parties page, perform the following steps:

1. On the Dashboard page, click START FILING.

   The Start Filing pane is displayed.

2. Click START A NEW CASE.

   The Upload Documents page is displayed.
Note: While you are entering a case filing, click to view the case number or draft number.

Figure 8.19 – Upload Documents Page

3. Click to look for the documents that you want to upload.

Note: The types of documents that can be uploaded are based on the configuration.

4. Select each document to be uploaded.

5. Click to continue with your filing.

Note: Your document will continue to upload as you proceed through the case filing.

The Case Information page is displayed.

6. Complete the required sections on the Case Information page, and then click to select the filing attorney.

7. Select the Person or Entity option.

Note: If Tyler has configured the Date of Death feature on your system, you may have the Decedent and Deceased options available in the Party Type drop-down list.

8. Complete the First Name, Middle Name (if applicable), and Last Name fields. Also, if appropriate, select the party’s suffix from the Suffix drop-down list.

9. Type the party case management system ID in the Party CMS ID field, if appropriate.

10. Select a language from the Interpreter drop-down list, if appropriate.

11. Click to select the filing attorney.

The Attorneys window is displayed.
12. Select the lead attorney for the first party on the case.

13. Select the additional attorneys for the case, and then click **LEAD ATTORNEY**. The **Lead Attorney** window is displayed with the attorneys that you selected. The lead attorney is indicated.

14. Click **SAVE**. The attorneys that you selected are listed on the **Parties** page.

15. Click **GO TO ADDRESS** to enter the address information for the first party.
16. Complete the required fields on the **Address** tab, and then click **GO TO ADDITIONAL IDENTIFIERS**.

17. Type a date in the **Date of Birth** field, or click to select a date from the calendar.

18. Type a date in the **Date of Death** field, or click to select a date from the calendar.

19. Click to enter information for any other required party.

20. Complete all of the required fields for the second party.

21. If you have another party to add to the case, click **ADD PARTY**. Continue to add parties until all parties have been added to the case.

22. Click **SAVE AND EXIT** to save your work and to continue.
Entering Filing Details

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

![Filings Page](image)

**Figure 8.24 – Filings Page**

**Note:** While you are entering a case filing, click ![Link](image) to view the case number or draft number.

To enter the filing details, perform the following steps:

1. Select the filing type from the **Filing Type** drop-down list.
2. Select the filing code from the **Filing Code** drop-down list.
3. Type a description in the **Filing Description** field.
4. Type a client reference number in the **Client Reference Number** field.
5. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
6. If you need to apply any optional services for the filing, click ![Link](image).

A new window is displayed.
7. To select the applicable optional services, click .

Some optional services require that you type the number of services that you need. For those services, the Multiplier will calculate the amount.

Note: If you decide that you do not want to use an optional service that you have selected, click .

8. Click to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

9. Click to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

10. Type the name of the party that you want to associate with the filing.

11. Select the relationship of the party from the Party Type drop-down list.

12. Select the check box for the party to which the associated party should be connected.
13. Click on  

14. In the Upload Documents pane, click on  

**Note:** The filing code that you enter determines the name of the component that is displayed in the Upload Documents pane. You may see a component other than “Lead Document” and “Attachments.”

**Note:** If you previously uploaded a document that you did not select and use in a filing, the document will be deleted after a period of time. The number of days that a document is kept before it is deleted is configurable, but all unused documents will be deleted after 365 days. If your document has been deleted, a message is displayed in the Upload Documents pane. You will be directed to upload another document for your filing.

![Figure 8.27 – Upload Documents Pane](image)

The *Select document(s) for Lead Document* window is displayed.

![Figure 8.28 – Select document(s) for Lead Document Window](image)

**Note:** If you have already uploaded a lead document, the document is listed in the window.

15. Click on  

**Note:** If you want to delete a document that you previously uploaded, click .
16. After you have added all of your lead documents, click **SAVE**.

17. If you have attachments to add to the filing, click **ADD DOCUMENTS** in the **Attachments** section.

18. If you want to add security to any of the documents, select an option from the **Security** drop-down list.

19. If you want to add another filing, click **NEXT FILING**. Then, repeat the same steps for the next filing.

20. After you have added all of the filings, click either **SERVICE** or **SKIP TO FEES**.

### Capability for Filing a Return Date

Filers can select a date by which the respondent must respond to the filing. Filers select the return date on the **Summary** page of a case filing.

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

![Return Date Pane](image)

**Figure 8.29 – Return Date Pane**

After selecting a return date, you must click **VERIFY** to check whether the selected date is available. If the selected date is verified, a confirmation message is displayed.

![Return Date Verified Message](image)

**Figure 8.30 – Return Date Verified Message**

If the selected date is not verified, the system may change the date. If the date is changed, the new date will be displayed.

![Sample Return Date Pane with Valid Date Displayed](image)

**Figure 8.31 – Sample Return Date Pane with Valid Date Displayed**

If you select an invalid return date, an error message is displayed.
Selecting a Return Date for a Case Filing

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

To select a return date for a case filing, perform the following steps:

1. From the Dashboard page, click **START FILING**.

The Start Filing pane is displayed.
2. Click [start new case]. The *Upload Documents* page is displayed.

3. Click [browse] to look for the documents that you want to upload.

4. Select each document to be uploaded.

5. Click [case information] to continue with your filing. The *Case Information* page is displayed.

*Note: Your document will continue to upload as you proceed through the case filing.*

6. Complete the details for the case by completing the fields on the *Case Information* page, and then click [parties]. The *Parties* page is displayed.

7. Complete the fields on the *Parties* page, and then click [filings]. The *Filings* page is displayed.

8. Complete the fields on the *Filings* page, and then click [service]. The *Service* page is displayed.

9. Select the service contacts, and then click [fees]. The *Fees* page is displayed.

10. Complete the fields on the *Fees* page, and then click [summary]. The *Summary* page is displayed.
11. On the Summary page, perform the following steps to select a return date:
   a. If the respondent is located out of state, select the Out of State Service check box.
   b. Type a date in the Return Date field, or click ![calendar icon] to select a date from the calendar.
   c. Click ![verify button].
      If the selected date is verified, a confirmation message is displayed.
      ![verified return date]
      If the selected date is not verified, the system may change the date. If the date is changed, the new date will be displayed in the Return Date field.
12. Verify the rest of the information on the Summary page, and then submit your filing.

Reverify the Return Date

The system forces a user to reverify the return date if the user navigates away from the Summary page before submitting the filing. When the user returns to the Summary page, the user must reverify the return date before the filing can be submitted.

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

Reverifying a Return Date

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

To reverify the return date, perform the following steps:

1. After making changes in your case filing, navigate to the Summary page.

   Note: You must reverify the return date that you previously selected.

   If the date you previously selected is still available, the date is displayed in the Return Date field.

   If the date you previously selected is no longer available, a new date is displayed in the Return Date field.

2. Click to verify the date that is displayed, or type a new date, and then click .

3. When all of the information on the Summary page is correct, click .
Capability for Filing Hearing Date

Filers can search for available hearing dates and then select a specified date. The hearing date is reserved in the system.

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

Filers can select a hearing date in a couple of ways:

- The filer completes a case filing and then submits it. Then the filer is prompted to select a hearing date and time.
- After a filing has been submitted, if a hearing was not previously scheduled, the filer can view the envelope details and then select a hearing date and time.

The filer schedules a hearing date and time on the Schedule Hearing page.

![Sample Schedule Hearing Page]

If the filer does not want to schedule a hearing at this time, the filer can click DO NOT SCHEDULE.

Scheduling a Hearing Date for a New Case Filing

You can schedule a hearing after completing all fields in a case filing and then submitting your filing.

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

Note: The example screens may differ from the screens displayed in your system.

To schedule a hearing for a new case filing, perform the following steps:

1. From the Dashboard page, click START FILING.
2. Click

The *Upload Documents* page is displayed.

3. Click **Browse** to look for the documents that you want to upload.

4. Select each document to be uploaded.

5. Click **Case Information** to continue with your filing.

The *Case Information* page is displayed.

**Note:** Your document will continue to upload as you proceed through the case filing.
6. Complete the details for the case by completing the fields on the Case Information page, and then click **PARTIES**.

   The Parties page is displayed.

7. Complete the fields on the Parties page, and then click **FILINGS**.

   The Filings page is displayed.
8. Complete the fields on the *Filings* page, and then click **SERVICE**. The *Service* page is displayed.

9. Select the service contacts, and then click **FEES**. The *Fees* page is displayed.

10. Complete the fields on the *Fees* page, and then click **SUMMARY**.
11. Complete any required fields on the Summary page, and verify all of the information. Then, click **SUBMIT**.

The Schedule Hearing page is displayed.

12. Select the hearing date and time that you want from the options listed, and then click **SAVE**.

A confirmation message is displayed, and then the Dashboard page is displayed.

**Note:** You can view the scheduled hearing date in the envelope details.
Note: If you want to schedule your hearing at another time, click **DO NOT SCHEDULE**.

Scheduling a Hearing for an Existing Case Filing

You can schedule a hearing for a case filing for which no hearing was previously scheduled, and the court has not yet reviewed the envelope.

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

To schedule a hearing for an existing case filing, perform the following steps:

1. On the Dashboard menu, click **Filing History**.
   
   The **Filing History** page is displayed.

   ![Figure 8.49 – Filing History Page](image)

2. Locate the specified case for which you want to schedule a hearing.

3. Click **Envelope Details**.
   
   The envelope details are displayed.
4. Click Schedule Hearing.

The Schedule Hearing page is displayed.

5. Select the hearing date and time that you want from the options listed, and then click Save.
A confirmation message is displayed, and then the Dashboard page is displayed.

Note: You can view the scheduled hearing date in the envelope details.

Entering a Filing with an Ad Damnum Amount

You can enter an Ad Damnum (damage) amount when that mount has been specified by the court. The Ad Damnum field is displayed on the Fees page. You can enter the amount of damages in the Ad Damnum field. When the Ad Damnum amount is set, an appropriate fee will be applied.

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

To enter filing details, perform the following steps:

1. On the Filings page, select a filing type from the Filing Type drop-down list.

   ![Filings Page](image)

   Figure 8.52 – Filings Page

2. Select the appropriate filing code from the Filing Code drop-down list.

   Note: In the example provided, the “Agreement (w/ Ad Damnum)” filing code is displayed. The wording in your system’s configuration may differ from the example.

3. Type a description of the filing in the Filing Description field.

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

5. Type any relevant comments in the Comments to Court field.

6. If you need to apply any optional services for the filing, click GO TO OPTIONAL SERVICES.

   A new window is displayed.
7. To select the applicable optional services, click ➔. Some optional services require that you type the number of services that you need. For those services, the Multiplier will calculate the amount.

Note: If you decide that you do not want to use an optional service that you have selected, click ←.

8. Click GO TO COMMUNICATION to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

9. Click ASSOCIATED PARTIES to associate parties with the filing. The Associate Parties to this Filing window is displayed.

10. Type the name of the party that you want to associate with the filing.
11. Select the relationship of the party from the Party Type drop-down list.
12. Select the check box for the party to which the associated party should be connected.
13. Click SAVE.

14. In the Upload Documents pane, click ADD DOCUMENTS.

Note: The filing code that you enter determines the name of the component that is displayed in the Upload Documents pane. You may see a component other than “Lead Document” and “Attachments.”

Note: If you previously uploaded a document that you did not select and use in a filing, the document will be deleted after a period of time. The number of days that a document is kept before it is deleted is configurable, but all unused documents will be deleted after 365 days. If your document has been deleted, a message is displayed in the Upload Documents pane. You will be directed to upload another document for your filing.

![Upload Documents Pane](image)

**Figure 8.55 – Upload Documents Pane**

The Select document(s) for Lead Document window is displayed.

![Select document(s) for Lead Document Window](image)

**Figure 8.56 – Select document(s) for Lead Document Window**

Note: If you have already uploaded a lead document, the document is listed in the window.

15. Click to select the lead document if a document has already been uploaded. Click to look for a document to upload or to locate additional lead documents.

Note: If you want to delete a document that you previously uploaded, click .
16. After you have added all of your lead documents, click in the Attachments section.

17. If you have attachments to add to the filing, click in the Attachments section.

18. If you want to add security to any of the documents, select an option from the Security drop-down list.

19. If you want to add another filing, click . Then, repeat the same steps for the next filing.

20. After you have added all of the filings, click .

   The Service page is displayed.

21. Select the service contacts, and then click .

   The Fees page is displayed.

![Figure 8.57 – Fees Page](image)

22. On the Fees page, type the amount of damages for the case in the Ad Damnum field.

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

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

   Note: If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.

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

   Note: All users may not see the Filing Attorney field.

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

27. Click .
The fees for the filing are displayed.

![Sample Ad Damnum Fees on the Fees Page](image)

28. Click **SUMMARY** to review and complete your filing.

**Entering a Filing with a Motion Type Code**

You can enter a filing for a specific motion type.

*Note: This feature is configured by Tyler and may not be available on your system.*
To enter a filing with a Motion Type code, perform the following steps:

1. On the Filings page, select the filing type from the Filing Type drop-down list.
2. Select a Motion filing code from the Filing Code drop-down list.
   The Motion Type drop-down list is displayed with a list of applicable Motion Types.
3. Select the appropriate Motion Type from the drop-down list.
4. Type a description of the filing in the Filing Description field.
5. Type a client reference number in the Client Reference Number field.
6. If you have any comments for the court regarding the filing, type them in the Comments to Court field.
7. If you need to apply any optional services for the filing, click Go to Optional Services. A new window is displayed.
8. To select the applicable optional services, click.

Some optional services require that you type the number of services that you need. For those services, the Multiplier will calculate the amount.

Note: If you decide that you do not want to use an optional service that you have selected, click.

9. Click to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

10. Click to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

11. Type the name of the party that you want to associate with the filing.

12. Select the relationship of the party from the Party Type drop-down list.

13. Select the check box for the party to which the associated party should be connected.
14. Click 🔄.

15. In the Upload Documents pane, click 🔄.

**Note:** The filing code that you enter determines the name of the component that is displayed in the Upload Documents pane. You may see a component other than “Lead Document” and “Attachments.”

![Upload Documents Pane](image)

**Figure 8.63 – Upload Documents Pane**

The *Select document(s) for Lead Document* window is displayed.

![Select document(s) for Lead Document Window](image)

**Figure 8.64 – Select document(s) for Lead Document Window**

**Note:** If you have already uploaded a lead document, the document is listed in the window.

16. Click 🔄 to select the lead document if a document has already been uploaded. Click 🔄 to look for a document to upload or to locate additional lead documents.

**Note:** If you want to delete a document that you previously uploaded, click 🔄.

17. After you have added all of your lead documents, click 🔄.

18. If you have attachments to add to the filing, click 🔄 in the Attachments section.

19. If you want to add security to any of the documents, select an option from the Security drop-down list.
20. If you want to add another filing, click [NEXT FILING]. Then, repeat the same steps for the next filing.

21. After you have added all of the filings, click either [SERVICE] or [SKIP TO FEES].

![Figure 8.65 – Example of a Filings Page with a Motion Filing Code Selected](image)

**Entering a Filing with a Claim Amount**

Filers can enter the Claim Amount when that amount has been specified by the court. The **Claim Amount** field is displayed on the **Fees** page. Filers can enter the amount in the **Claim Amount** field. When the Claim Amount is set, an appropriate fee will be applied.

**Note:** The Claim Amount feature is configured by Tyler and may not be available on your system.

To enter filing details, perform the following steps:

1. On the **Filings** page, select a filing type from the **Filing Type** drop-down list.
Figure 8.66 – Filings Page

2. Select the **Waiver w/ special behavior** filing code from the **Filing Code** drop-down list.

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

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

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

6. If you need to apply any optional services for the filing, click **GO TO OPTIONAL SERVICES**.

   A new window is displayed.

   ![Optional Services Tab](image)

   **Figure 8.67 – Sample Optional Services Tab**

7. To select the applicable optional services, click the checkbox next to each service.

   Some optional services require that you type the number of services that you need. For those services, the Multiplier will calculate the amount.
Note: If you decide that you do not want to use an optional service that you have selected, click.

8. Click **GO TO COMMUNICATION** to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

9. Click **ASSOCIATED PARTIES** to associate parties with the filing.

The **Associate Parties to this Filing window** is displayed.

![Figure 8.68 – Associate Parties to this Filing Window](image)

10. Type the name of the party that you want to associate with the filing.

11. Select the relationship of the party from the **Party Type** drop-down list.

12. Select the check box for the party to which the associated party should be connected.

13. Click **SAVE**.

14. In the Upload Documents pane, click **ADD DOCUMENTS**.

Note: The filing code that you enter determines the name of the component that is displayed in the Upload Documents pane. You may see a component other than “Lead Document” and “Attachments.”

Note: If you previously uploaded a document that you did not select and use in a filing, the document will be deleted after a period of time. The number of days that a document is kept before it is deleted is configurable, but all unused documents will be deleted after 365 days. If your document has been deleted, a message is displayed in the Upload Documents pane. You will be directed to upload another document for your filing.
Figure 8.69 – Upload Documents Pane

The Select document(s) for Lead Document window is displayed.

Figure 8.70 – Select document(s) for Lead Document Window

Note: If you have already uploaded a lead document, the document is listed in the window.

15. Click to select the lead document if a document has already been uploaded. Click to look for a document to upload or to locate additional lead documents.

Note: If you want to delete a document that you previously uploaded, click .

16. After you have added all of your lead documents, click .

17. If you have attachments to add to the filing, click in the Attachments section.

18. If you want to add security to any of the documents, select an option from the Security drop-down list.

19. If you want to add another filing, click . Then, repeat the same steps for the next filing.

20. After you have added all of the filings, click . The Service page is displayed.

21. Select the service contacts, and then click .
The Fees page is displayed.

![Fees Page](image)

**Figure 8.71 – Fees Page**

22. On the Fees page, type the Claim Amount in the Claim Amount field.

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

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

   **Note:** If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.

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

   **Note:** All users may not see the Filing Attorney field.

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

27. Click Calculate Fees.

   The fees for the filing are displayed.
28. Click to review and complete your filing.

### Entering a Filing with an Estate Value

Filers can enter the Estate Value when specified by the court. The Estate Value is the valued amount of an estate in probate cases. The Estate Value field is displayed on the Fees page. Filers can enter the amount in the Estate Value field. When the Estate Value is set, an appropriate fee will be applied.

**Note:** The Estate Value feature is configured by Tyler and may not be available on your system.

To enter filing details, perform the following steps:

1. On the Filings page, select a filing type from the Filing Type drop-down list.

2. Select the Statement w/ special behavior – $10.50 filing code from the Filing Code drop-down list.
3. Type a description of the filing in the **Filing Description** field.

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

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

6. If you need to apply any optional services for the filing, click **GO TO OPTIONAL SERVICES**.

   A new window is displayed.

   ![Sample Optional Services Tab](image)

   **Figure 8.74 – Sample Optional Services Tab**

7. To select the applicable optional services, click **GO TO COMMUNICATION**.

   Some optional services require that you type the number of services that you need. For those services, the Multiplier will calculate the amount.

   **Note: If you decide that you do not want to use an optional service that you have selected, click **GO TO COMMUNICATION**.**

8. Click **GO TO COMMUNICATION** to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

9. Click **ASSOCIATED PARTIES** to associate parties with the filing.

   The **Associate Parties to this Filing** window is displayed.
10. Type the name of the party that you want to associate with the filing.
11. Select the relationship of the party from the Party Type drop-down list.
12. Select the check box for the party to which the associated party should be connected.
13. Click Save.
14. In the Upload Documents pane, click Add Documents.

**Note:** The filing code that you enter determines the name of the component that is displayed in the Upload Documents pane. You may see a component other than “Lead Document” and “Attachments.”

**Note:** If you previously uploaded a document that you did not select and use in a filing, the document will be deleted after a period of time. The number of days that a document is kept before it is deleted is configurable, but all unused documents will be deleted after 365 days. If your document has been deleted, a message is displayed in the Upload Documents pane. You will be directed to upload another document for your filing.

**Figure 8.75 – Associate Parties to this Filing Window**

**Figure 8.76 – Upload Documents Pane**

The Select document(s) for Lead Document window is displayed.
15. Click \(\rightarrow\) to select the lead document if a document has already been uploaded. Click \(\rightarrow\) to look for a document to upload or to locate additional lead documents.

Note: If you want to delete a document that you previously uploaded, click \(\rightarrow\).

16. After you have added all of your lead documents, click \(\rightarrow\).

17. If you have attachments to add to the filing, click \(\rightarrow\) in the Attachments section.

18. If you want to add security to any of the documents, select an option from the Security drop-down list.

19. If you want to add another filing, click \(\rightarrow\). Then, repeat the same steps for the next filing.

20. After you have added all of the filings, click \(\rightarrow\). The Service page is displayed.

21. Select the service contacts, and then click \(\rightarrow\). The Fees page is displayed.
22. On the Fees page, type the Estate Value in the Estate Value field.

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

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

   **Note:** If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.

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

   **Note:** All users may not see the Filing Attorney field.

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

27. Click the Calculate Fees button.

The fees for the filing are displayed.
28. Click to review and complete your filing.

**Entering Payment Information**

Enter the payment information for your filing on the *Fees* page.

*Note: You must create a payment account before you can complete your filing.*

**Note: While you are entering a case filing, click to view the case number or draft number.**

To enter the payment information for your filing, perform the following steps:

1. Select the payment account from the *Payment Account* drop-down list.
2. Select the party responsible for fees from the *Party Responsible for Fees* drop-down list. Click if you want to search for a party.
3. Select the filer type from the **Filer Type** drop-down list.

4. Click **CALCULATE FEES**.
   
   The fees for the filing are displayed.

5. Review the filing fees, and then click **SUMMARY**.
Entering Payment Information for Per-Page Optional Service Fee

You can select optional services for your case filing. One of the options calculates the service fee on a per-page basis.

**Note:** The per-page optional service fee option is configured by Tyler and may not be available on your system.

**Note:** You must create a payment account before you can complete your filing.

To enter the payment information for your filing, perform the following steps:

1. On the *Upload Documents* page, upload your lead document, and attachments, if applicable.
2. On the *Case Information* page, enter the information for the case.
3. On the *Parties* page, enter the information for all parties on the case.
4. On the *Filings* page, enter the filing details:
   - Select the filing type and the filing code from the respective drop-down lists.
   - If appropriate, type a description of the filing and the client reference number in the respective fields.
   - Click **GO TO OPTIONAL SERVICES**.
     
     A new window is displayed.

   ![Sample Optional Services Tab](image)

   **Figure 8.83 – Sample Optional Services Tab**

   - To select the applicable optional services, click .
   - Some optional services require that you type the number of services that you need. The per-page optional service is one of those services. After you type the number of services, the Multiplier will calculate the amount.
   - Continue entering the rest of the required information on the *Filings* page.
5. On the Service page, add the appropriate service contacts.

6. On the Fees page, select the payment account from the Payment Account drop-down list.

7. Select the party responsible for fees from the Party Responsible for Fees drop-down list. Click if you want to search for a party.

   \[\text{Figure 8.84 – Select Party Responsible For Fees Window}\]

   Note: If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.

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

9. Click .

   The fees for the filing are displayed.

   \[\text{Figure 8.85 – Example of a Fees Page with the Filing Fees Displayed}\]

10. Review the filing fees, and then click .
Submission Agreements

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

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

The Submission Agreements pane is displayed on the *Summary* page.

![Submission Agreements Pane – One Disclaimer](image)

If submission agreements are configured by your court, you must select the check box in the Submission Agreements pane to complete your filing.

![Submission Agreements Pane with the Check Box Selected – One Disclaimer](image)

Your court may be configured with more than one disclaimer. The specific wording of each disclaimer is configured by Tyler at the court’s request.

![Submission Agreements Pane – Two Disclaimers](image)

If submission agreements are configured by your court, you must select both check boxes in the Submission Agreements pane to complete your filing.

![Submission Agreements Pane with the Check Boxes Selected – Two Disclaimers](image)

If no submission agreements are required by your court, the Submission Agreements pane is displayed with no options to select.
Viewing the Envelope Summary

The envelope summary provides a summary of case information, such as the location of the filing, the parties involved in the case, filing details, fees, and payments for the case.

The party, filings, and fees information must be complete before you can view the envelope summary.

To view the envelope summary, perform the following steps:

1. Complete the required information in the Case, Parties, Filings and Fees sections.

2. After you have completed the fields in each section, from the Fees page, click Summary.

   The Summary page is displayed.

   ![Sample Summary Page](image)

If you have uploaded a document that you have not attached to your filing, a message is displayed, asking you if you want to attach the document to the filing, keep the document in your library for use in another filing, or delete the document from your library.

![Unused Documents Message](image)

3. Click the appropriate button regarding the unused document.
4. If there are submission agreements for your filing, select the appropriate check boxes for the submission agreements.

5. Review the summary of the case filing. After you are satisfied with the information in your filing, click **SUBMIT**.
The eFile application supports the Redaction feature. Redaction refers to the removal or obscuring of sensitive information, such as Social Security numbers. Filers can redact a document, view the redacted document, and then make modifications, if necessary, before uploading the redacted document to the case management system.

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

**Note:** You can perform redactions by using the Redaction Editor (which is displayed as the *Tyler Content Manager* window). This window opens in a separate tab in your browser. You must enable pop-ups in your browser settings to view the Redaction Editor (*Tyler Content Manager* window) and to perform redactions. The icons that are visible in the Redaction Editor (*Tyler Content Manager* window) may differ slightly from the screen shots contained in this document.

The following data is automatically redacted:

- Social Security Numbers
- Tax ID Numbers (EINs)
- Passport Numbers
- Credit Card Numbers
- Driver’s License Numbers
- Account Numbers
- Government ID Numbers
- Names of Minors Listed as Parties on the Case
- Dates of Birth of Minors
- Addresses of Minors Listed on the Case

### Entering a Filing with Redacted Documents

You can enter a filing in which you upload a lead document (and attachments, if applicable) and then redact the documents that you uploaded.

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

To enter a filing with redacted documents, perform the following steps:

1. On the *Dashboard* page, click **START FILING**.

   The Start Filing pane is displayed.
2. Click **START A NEW CASE**.

   The *Upload Documents* page is displayed.

3. Click **BROWSE** to look for the documents that you want to upload.

4. Select each document to be uploaded.

   The documents that you selected are listed on the *Upload Documents* page.

5. Click **AUTO-REDACT**.

   Note: The redaction process begins immediately, and you can continue with your case filing while the documents are being redacted. When your document has successfully been redacted,
a green message is displayed, indicating that the redaction was completed. The message also indicates how many redactions were performed.

Figure 9.4 – Example of a Message for a Completed Redaction

6. Click **CASE INFORMATION** to continue with your filing.

   The *Case Information* page is displayed.

7. Complete the required fields on the *Case Information* page, and then click **PARTIES**.

   The *Parties* page is displayed.

8. Complete the required fields on the *Parties* page, and then click **FILINGS**.

   The *Filings* page is displayed.

9. Complete the required fields on the *Filings* page, and then click **SERVICE**.

   The *Service* page is displayed.

10. Complete the required fields on the *Service* page, and then click **FEES**.

    The *Fees* page is displayed.

11. Complete the required fields on the *Fees* page, and then click **SUMMARY**.

    The *Summary* page is displayed.
12. Review the envelope summary. If you want to edit the redacted document, click **EDIT REDACTIONS**.

The Redaction Editor (*Tyler Content Manager* window) opens in a new tab in your browser.

*Note: If the redaction of your document is not complete, an amber message is displayed, indicating that you cannot yet complete your filing. You must wait until the redaction is complete, and then a green message is displayed, informing you of the completion.*

13. Perform the necessary edits in the Redaction Editor, and then click **save changes** to save your changes, or click **Save and close** to save your changes and close the viewer.

14. When you are done reviewing the envelope summary and have selected the check boxes for the submission agreements (if applicable), click **Submit**.
Deleting a Redaction

After you mark a section to be redacted and before you close the Redaction Editor (Tyler Content Manager window), you can delete the specified redaction.

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

**Note:** You must enable pop-ups in your browser settings to view the Redaction Editor (Tyler Content Manager window).

To delete a redaction in a document before you have closed the Redaction Editor (Tyler Content Manager window), perform the following steps:

1. Right-click the specified redaction.
   
   The *Annotation Notes* dialog box is displayed.

   ![Annotation Notes Dialog Box](image)

   **Figure 9.7 – Annotation Notes Dialog Box**

   **Note:** On the *Annotation Notes* dialog box, you can annotate the redaction, copy the redaction, or cut the redaction and paste it in another part of the document. You can also view a detailed history of the redactions that were performed in the document. Click to view the detailed history.

2. Click to delete the redaction.
   
   The *Delete Annotation* dialog box is displayed.

   ![Delete Annotation? Dialog Box](image)

   **Figure 9.8 – Delete Annotation? Dialog Box**

3. Click to delete the specified redaction.
Working with an Existing Redaction

You can resize or move an existing redaction in the Redaction Editor (*Tyler Content Manager* window).

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

**Note:** You must enable pop-ups in your browser settings to view the Redaction Editor (*Tyler Content Manager* window).

To work with an existing redaction, perform the following steps:

1. Turn off the manual redaction capability by clicking .
2. Locate the existing redaction that you want to resize or move, and then click the block of text.
3. Resize the redaction, or move the redaction to another location in the document.
4. When you are done, click to save your changes, or click to save your changes and close the viewer.

Redaction Editor Toolbar

You can use icons to navigate in the Redaction Editor (which is displayed as the *Tyler Content Manager* window).

**Note:** The icons that are visible in the Redaction Editor (*Tyler Content Manager* window) may differ slightly from the screen shots contained in this document.

The following table describes the icons in the Redaction Editor (*Tyler Content Manager* window).

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Click this icon to begin performing a redaction.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Click this icon to stop performing a redaction.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Click this icon to save the document.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Click this icon to save and close the document.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Click this icon to close the <em>Tyler Content Manager</em> (TCM) viewer.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Click this icon to zoom in to a particular place in the document.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Click this icon to zoom out.</td>
</tr>
<tr>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Click this icon to rubberband (that is, draw a border around) an area of the document in which you want to zoom.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>Click this icon to magnify an area of the document.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>Click this icon to fit the document to the window.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td>Click this icon to fit the document to the height of the window.</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td>Click this icon to fit the document to the width of the window.</td>
</tr>
<tr>
<td><img src="image6.png" alt="Icon" /></td>
<td>Click this icon to view the first page of the document.</td>
</tr>
<tr>
<td><img src="image7.png" alt="Icon" /></td>
<td>Click this icon to view the previous page of the document.</td>
</tr>
<tr>
<td><img src="image8.png" alt="Icon" /></td>
<td>Use this window to view the current page of the document and the length of the document.</td>
</tr>
<tr>
<td><img src="image9.png" alt="Icon" /></td>
<td>Click this icon to view the next page of the document.</td>
</tr>
<tr>
<td><img src="image10.png" alt="Icon" /></td>
<td>Click this icon to view the last page of the document.</td>
</tr>
<tr>
<td><img src="image11.png" alt="Icon" /></td>
<td>Click this icon to rotate the document to the right.</td>
</tr>
<tr>
<td><img src="image12.png" alt="Icon" /></td>
<td>Click this icon to rotate the document to the left.</td>
</tr>
<tr>
<td><img src="image13.png" alt="Icon" /></td>
<td>Click this icon to download the document. <strong>Note:</strong> You will be prompted to save the document before you download it.</td>
</tr>
<tr>
<td><img src="image14.png" alt="Icon" /></td>
<td>Click this icon to display the thumbnail pane, where you can then navigate through the pages of the document. The thumbnail pane is displayed. <strong>Note:</strong> Click the icon again to close the thumbnail pane.</td>
</tr>
</tbody>
</table>

When the thumbnail pane is displayed, additional document options become available.
The following table describes the icons in the thumbnail pane.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Folder" /></td>
<td>Click this icon in the thumbnail pane to view the pages of the document in the Redaction Editor.</td>
</tr>
<tr>
<td><img src="image" alt="Previous" /></td>
<td>Click this icon in the thumbnail pane to display the previous annotation page.</td>
</tr>
<tr>
<td><img src="image" alt="Next" /></td>
<td>Click this icon in the thumbnail pane to display the next annotation page.</td>
</tr>
<tr>
<td><img src="image" alt="Redactions" /></td>
<td>Click this icon in the thumbnail pane to view only the pages that have a redaction on them.</td>
</tr>
</tbody>
</table>
10 File into an Existing Case

Topics covered in this chapter
♦ Filing into an Existing Case from the Filing History Page
♦ Filing into an Existing Case from the Case Search Page
♦ Filing into an Existing Case from the Dashboard Page
♦ Filing into a Non-Indexed Case
♦ Creating a Service Only Filing

Once a court has created a new case, you can file into the existing case.

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

- On the Filing History page, locate the case that you want to file into, and then click [button].
- On the Dashboard page, click Case Search. In the File into Existing Case window that opens, enter the search criteria for the case that you want to file into. Then, click [button].
- On the Dashboard page, click [button]. In the File into Existing Case window that opens, enter the search criteria for the case that you want to file into. Then, click [button].

Filing into an Existing Case from the Filing History Page

Once a new case has been created by the courts, you can file into the existing case.
To file into an existing case from the Filing History page, perform the following steps:

1. On the Filing History page, click [button].
The Documents page of the specified case is displayed. Any documents that were previously uploaded are displayed.

2. Click to enter case information, or click if you want to go directly to the Filings page.

Note: If you choose to go directly to the Filings page, the case and party information from the initial case remains the same. The ability to add a new party to an existing case is configurable.

If your system is configured with this capability, is displayed on the Parties page.

3. On the Filings page, select the filing type from the Filing Type drop-down list.

4. Select the filing code from the Filing Code drop-down list.

5. Type a description in the Filing Description field.

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

7. If you have any comments for the court regarding the filing, type them in the Comments to Court field.

8. If you need to apply any optional services for the filing, click .

A new window is displayed.

9. To select the applicable optional services, click .

Some optional services require that you type the number of services that you need. For those services, the Multiplier will calculate the amount.

Note: If you decide that you do not want to use an optional service that you have selected, click .
10. Click **GO TO COMMUNICATION** to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

11. Click **ASSOCIATED PARTIES** to associate parties with the filing.

The **Associate Parties to this Filing** window is displayed.

![Figure 10.2 – Associate Parties to this Filing Window](image)

12. Type the name of the party that you want to associate with the filing.

13. Select the relationship of the party from the **Party Type** drop-down list.

14. Select the check box for the party to which the associated party should be connected.

15. Click **SAVE**.

16. In the Upload Documents pane, click **ADD DOCUMENTS**.

![Figure 10.3 – Upload Documents Pane](image)

The **Select document(s) for Lead Document** window is displayed.
17. Click ![BROWSE](image) to look for a document to upload. Then, click ![→](arrow) to select the lead document.

   **Note:** If you want to delete a document that you have uploaded, click ![Trash](trash) .

18. After you have added all of your lead documents, click ![SAVE](save) .

19. If you have attachments to add to the filing, click ![ADD DOCUMENTS](add-documents) in the **Attachments** section.

20. If you want to add security to any of the documents, select an option from the **Security** drop-down list.

21. If you want to add another filing, click ![NEXT FILING](next-filing) . Then, repeat the same steps for the next filing.

22. After you have added all of the filings, click either ![SERVICE](service) or ![SKIP TO FEES](skip-to-fees) .

23. On the **Service** page, add service contacts if applicable. Then, click ![FEES](fees) .

24. On the **Fees** page, select the payment account from the **Payment Account** drop-down list.

25. Select the party responsible for fees from the **Party Responsible for Fees** drop-down list.

   **Note:** If there are no fees associated with your filing, you may not be required to make a selection in the **Party Responsible for Fees** field.

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

27. Click ![CALCULATE FEES](calculate-fees) if you want to view the fee total.

28. Click ![SUMMARY](summary) .

29. Review the summary. If applicable, select the **Submission Agreements** check box.
30. When you are satisfied with your filing, click **Submit**.

**Filing into an Existing Case from the Case Search Page**

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

1. On the Dashboard menu, click **Case Search**.

   The *File into Existing Case* window is displayed.

![File into Existing Case Window](image)

**Figure 10.5 – File into Existing Case Window—Includes Party Name Option**

*Note*: Your system may be configured to only search by case number. With this optional configuration, the Party Name option is not displayed.
2. Type the search criteria in the window, and then click **SEARCH**.

Note: You can search by case number or party name. You must know the location of the existing case to complete your search.

The case that matches your search criteria is displayed.

3. Click **File** to file into the case.

The **Documents** page of the specified case is displayed. Any documents that were previously uploaded are displayed.

4. Click **Case Information** to enter case information, or click **Skip to Filings** if you want to go directly to the **Filings** page.

Note: If you choose to go directly to the **Filings** page, the case and party information from the initial case remains the same. The ability to add a new party to an existing case is configurable.

If your system is configured with this capability, **Add Party** is displayed on the **Parties** page.

5. On the **Filings** page, select the filing type from the **Filing Type** drop-down list.

6. Select the filing code from the **Filing Code** drop-down list.
7. Type a description in the **Filing Description** field.
8. Type a client reference number in the **Client Reference Number** field.
9. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
10. If you need to apply any optional services for the filing, click **GO TO OPTIONAL SERVICES**.
   A new window is displayed.

11. To select the applicable optional services, click **GO TO COMMUNICATION**.
    Some optional services require that you type the number of services that you need. For those services, the Multiplier will calculate the amount.

    **Note: If you decide that you do not want to use an optional service that you have selected, click**

12. Click **ASSOCIATED PARTIES** to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

13. Click **ASSOCIATED PARTIES** to associate parties with the filing.

    The **Associate Parties to this Filing** window is displayed.

    **Figure 10.8 – Associate Parties to this Filing Window**

14. Type the name of the party that you want to associate with the filing.
15. Select the relationship of the party from the **Party Type** drop-down list.
16. Select the check box for the party to which the associated party should be connected.
17. Click **SAVE**.

18. In the Upload Documents pane, click **ADD DOCUMENTS**.
19. Click \( \text{BROWSE} \) to look for a document to upload. Then, click \( \rightarrow \) to select the lead document.

Note: If you want to delete a document that you have uploaded, click \( \text{trash can} \).

20. After you have added all of your lead documents, click \( \text{SAVE} \).

21. If you have attachments to add to the filing, click \( \text{ADD DOCUMENTS} \) in the Attachments section.

22. If you want to add security to any of the documents, select an option from the Security drop-down list.

23. If you want to add another filing, click \( \text{NEXT FILING} \). Then, repeat the same steps for the next filing.

24. After you have added all of the filings, click either \( \text{SERVICE} \) or \( \text{SKIP TO FEES} \).

25. On the Service page, add service contacts if applicable. Then, click \( \rightarrow \).

26. On the Fees page, select the payment account from the Payment Account drop-down list.

27. Select the party responsible for fees from the Party Responsible for Fees drop-down list.
Note: If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.

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

29. Click **CALCULATE FEES** if you want to view the fee total.

30. Click **SUMMARY**.

31. Review the summary. If applicable, select the **Submission Agreements** check box.

32. When you are satisfied with your filing, click **SUBMIT**.

**Filing into an Existing Case from the Dashboard Page**

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

1. In the Case Search pane, locate the case that you want to file into. Then click the link for the specified case.

   The *File into Existing Case* window is displayed.

![File into Existing Case Window](image)

**Figure 10.11 – File into Existing Case Window—Includes Party Name Option**

Note: Your system may be configured to only search by case number. With this optional configuration, the Party Name option is not displayed.
2. Type the search criteria in the window, and then click **SEARCH**.

   *Note: You can search by case number or party name. You must know the location of the existing case to complete your search.*

   The case that matches your search criteria is displayed.

3. Click **add file icon** to file into the case.

   The **Documents** page of the specified case is displayed. Any documents that were previously uploaded are displayed.

4. Click **case information icon** to enter case information, or click **skip to filings** if you want to go directly to the **Filings** page.

   *Note: If you choose to go directly to the **Filings** page, the case and party information from the initial case remains the same. The ability to add a new party to an existing case is configurable.*

   *If your system is configured with this capability, **add party** is displayed on the **Parties** page.*

5. On the **Filings** page, select the filing type from the **Filing Type** drop-down list.

6. Select the filing code from the **Filing Code** drop-down list.
7. Type a description in the **Filing Description** field.

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

9. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.

10. If you need to apply any optional services for the filing, click **GO TO OPTIONAL SERVICES**. A new window is displayed.

11. To select the applicable optional services, click **GO TO COMMUNICATION**.

   Some optional services require that you type the number of services that you need. For those services, the Multiplier will calculate the amount.

   **Note:** If you decide that you do not want to use an optional service that you have selected, click **GO TO COMMUNICATION**.

12. Click **ASSOCIATED PARTIES** to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

13. Click **ASSOCIATED PARTIES** to associate parties with the filing.

   The **Associate Parties to this Filing** window is displayed.

![Figure 10.14 – Associate Parties to this Filing Window](image)

14. Type the name of the party that you want to associate with the filing.

15. Select the relationship of the party from the **Party Type** drop-down list.

16. Select the check box for the party to which the associated party should be connected.

17. Click **SAVE**.

18. In the Upload Documents pane, click **ADD DOCUMENTS**.
19. Click **BROWSE** to look for a document to upload. Then, click **ADD DOCUMENTS** to select the lead document.

**Note:** If you want to delete a document that you have uploaded, click **Trash Bin**.

20. After you have added all of your lead documents, click **SAVE**.

21. If you have attachments to add to the filing, click **ADD DOCUMENTS** in the **Attachments** section.

22. If you want to add security to any of the documents, select an option from the **Security** drop-down list.

23. If you want to add another filing, click **NEXT FILING**. Then, repeat the same steps for the next filing.

24. After you have added all of the filings, click either **SERVICE** or **SKIP TO FEES**.

25. On the **Service** page, add service contacts if applicable. Then, click **SERVICE**.

26. On the **Fees** page, select the payment account from the **Payment Account** drop-down list.

27. Select the party responsible for fees from the **Party Responsible for Fees** drop-down list.
Note: If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.

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

29. Click **CALCULATE FEES** if you want to view the fee total.

30. Click **SUMMARY**.

31. Review the summary. If applicable, select the **Submission Agreements** check box.

32. When you are satisfied with your filing, click **SUBMIT**.

### Filing into a Non-Indexed Case

You can file into a case that does not exist in the case management system.

To file into a non-indexed case, perform the following steps:

1. On the Dashboard menu, click **Case Search**.

   The **File into Existing Case** window is displayed.

![File into Existing Case Window](image)

   **Figure 10.17 – File into Existing Case Window—Includes Party Name Option**

   **Note:** Your system may be configured to only search by case number. With this optional configuration, the Party Name option is not displayed.
2. Select the location from the **Location** drop-down list.

   **Note:** The location you select must be a non-integrated or non-indexed node.

3. Select the **Case Number** option (which may be the only option that is displayed), and then type the case number in the **Case Number** field.

4. Click **SEARCH**.

   A message is displayed, stating that the case number you entered could not be found.

5. To continue, click **I DON'T SEE MY CASE**.

   The *I Don't See My Case* window is displayed.
6. Click **I UNDERSTAND, CONTINUE** to continue filing into the case.

   The *Case Information* page is displayed. The location and case number are auto-filled on the page.

   ![Figure 10.21 – Case Information Page](image)

7. Select the case category from the **Case Category** drop-down list.
8. Select the case type from the **Case Type** drop-down list.
9. Select the case subtype, if applicable, from the **Case Sub Type** drop-down list.
10. Click **PARTIES** to save your work and continue.
11. Continue entering case information on the following pages until you reach the *Summary* page.
12. Review your filing. When you are satisfied with the information you have entered, click **SUBMIT**.
Creating a Service Only Filing

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

1. Select an existing case that you want to file into.

2. Follow one of the methods for filing into an existing case (that is, from the Filing History page, from the Case Search page, or from the Dashboard page).

   Note: The Case and Parties pages are already populated since this is an existing case.

3. On the Filings page, select Service Only from the Filing Type drop-down list.

4. In the Upload Documents pane, click ADD DOCUMENTS.

   ![Figure 10.22 – Upload Documents Pane](image)

   The Select document(s) for Lead Document window is displayed.

   ![Figure 10.23 – Select Document(s) for Lead Document Window](image)

5. Click BROWSE to look for a document to upload. Then, click \( \rightarrow \) to select the lead document.

   Note: If you want to delete a document that you have uploaded, click \( \rightarrow \).

6. After uploading your documents, click SAVE.

7. If you want to add security to any of the documents, select an option from the Security drop-down list.
8. Click **SERVICE** to save your entries and to continue.

9. On the **Service** page, add the service contacts that you want to receive a Service Only filing. You can select the **Serve all** check box, or you can select the **Serve all party contacts** check box.

   **Note:** Selecting the “Serve all” check box automatically selects the “Serve all party contacts” check box.

![Figure 10.24 – Service Page for a Service Only Filing](image)

10. Click **FEES** to save your entries and to continue.

11. Complete the required fields on the **Fees** page, and then click **FEES**.

12. Select the check boxes for the submission agreements, if applicable.

13. Review the information on the **Summary** page, and then click **SUMMARY**.
11 Service Contacts

Topics covered in this chapter
♦ Adding a New Service Contact
♦ Adding a Service Contact from My Service Contact List to a Filing
♦ Adding a Service Contact from a Public List to a Filing
♦ Adding a New Service Contact to a Filing
♦ Updating Information for an Existing Service Contact
♦ Viewing Attached Case List of Service Contacts
♦ Updating Information for a Case Service Contact
♦ Deleting a Service Contact

You can add a service contact to your service contacts list on the Service Contacts page. You can also add a service contact while you are entering a case filing.

When you add a service contact on the Service Contacts page, you can quickly retrieve that contact at a later time when you are entering a case filing. You can also create a service contact while you are entering a case filing, and then you can save that service contact for use in future filings.

Service contacts from a public list are also available for you to use when you are entering a case filing.

Adding a New Service Contact

You can add a new service contact to your list of contacts.

To add a new service contact to your contacts list, perform the following steps:

1. On the Dashboard menu, click My Service Contacts.

   The Service Contacts page is displayed.

   Figure 11.1 – Service Contacts Page

2. Click .
Additional fields are displayed.

![Figure 11.2 – Service Contacts – Additional Fields](image)

3. Select the appropriate check box for the new service contact: Add To My List or Add to Public List.

   **Note:** If you add the service contact to the public list, other filers will have access to that contact for their filings.

4. Complete the required information in the First Name and Last Name fields. Add a middle name, if applicable, in the Middle Name field.

5. Type the contact's email address in the Email field.

   **Note:** You must provide either an email address or a physical address. You can enter both addresses if applicable.

6. If applicable, type a phone number in the Phone Number field.

7. If the contact is in a country other than the United States, select the country from the drop-down list.

   The default selection is United States.

8. If a physical address is required for the service contact, type the address in the Address Line 1 field.

9. If applicable, type an address in the Address Line 2 field.

10. Type the name of the city in the City field.

11. Select the state from the State drop-down list.

12. Type the ZIP code in the Zip Code field.

13. After you have entered the required information, click Save.

   The contact that you added is displayed in the list on the Service Contacts page.
Adding a Service Contact from My Service Contact List to a Filing

You can add a service contact from your contact list to a filing.

To add a service contact from your contact list to a filing, perform the following steps:

1. On the Service page, click \textit{FROM MY SERVICE CONTACT LIST}.
   \begin{figure}[h]
   \centering
   \includegraphics[width=\textwidth]{my_service_contacts.png}
   \caption{My Service Contacts Window}
   \end{figure}

   The \textit{My Service Contacts} window is displayed.

2. If you want to filter the list, type at least one letter in a field, and then click \textit{FILTER}.
   The service contacts that match the information you entered are displayed.

3. Select the check box for each contact that you want to add to the filing.

4. After you have selected the contacts for your filing, click \textit{ASSOCIATED PARTIES}.
   The \textit{Associated Parties} window is displayed.
5. Select the party that you want to associate with the selected service contact or contacts from the **Parties** drop-down list, and then click **SAVE**.

**Note:** if you want to return to the list of service contacts to make any changes or additions, click **MY SERVICE CONTACTS**.

The service contacts that you added are displayed on the **Service** page.

---

**Adding a Service Contact from a Public List to a Filing**

You can add a service contact from a public list to a filing.

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

1. On the **Service** page, click **FROM PUBLIC LIST**.

   The **Public Service Contacts** window is displayed.
2. Type at least one letter in a field, and then click **FILTER**.

The public service contacts that match the information you entered are displayed. The system returns a maximum of 100 public service contacts.

3. Locate the contacts that you want to add to your filing. If the list of contacts includes more than one page, click through the pages until you have located the contacts that you want to add.

4. Select the check box for each contact that you want to add.

5. After you have selected the contacts for your filing, click **ASSOCIATED PARTIES**.

The **Associated Parties** window is displayed.
6. Select the party that you want to associate with the selected service contacts from the Parties dropdown list, and then click **SAVE**.

**Note:** If you want to review the list of public service contacts to make any changes or additions, click **PUBLIC SERVICE CONTACTS**.

The public service contacts that you added are displayed on the Service page.

### Adding a New Service Contact to a Filing

You can add a new service contact to a filing.

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

1. On the Service page, click **ADD NEW CONTACT**.

   The Add Service Contact window is displayed.
Figure 11.10 – Add Service Contact Window

2. Select the appropriate check box for the new service contact: **Add To My List** or **Add to Public List**.

   **Note:** If you add the service contact to the public list, other filers will have access to that contact for their filings.

3. Complete the required information in the **First Name** and **Last Name** fields. Add a middle name, if applicable, in the **Middle Name** field.

4. Type the contact’s email address in the **Email** field.

   **Note:** You must provide either an email address or a physical address. You can enter both addresses if applicable.

5. If applicable, type a phone number in the **Phone Number** field.

6. If the contact is in a country other than the United States, select the country from the drop-down list.

   **The default selection is United States.**

7. If a physical address is required for the service contact, type the address in the **Address Line 1** field.

8. If applicable, type an address in the **Address Line 2** field.

9. Type the name of the city in the **City** field.

10. Select the state from the **State** drop-down list.
11. Type the ZIP code in the **Zip Code** field.

12. After you have entered the required information, click **Save**. The contact that you added is displayed on the **Service** page of your filing.

![Service Page in a Case Filing](image)

*Figure 11.11 – Service Page in a Case Filing*

### Updating Information for an Existing Service Contact

You can update the information that you previously entered for a service contact.

To **update** the information for an existing service contact, perform the following steps:

1. On the Dashboard menu, click **My Service Contacts**.
   
The **Service Contacts** page is displayed.

![Service Contacts Page](image)

*Figure 11.12 – Service Contacts Page*

2. Locate the service contact that you want to update, and then click **Edit**.
   
The additional fields for the specified service contact are displayed with the information that you previously entered.

3. Update the information, as applicable.
4. When you are done with your updates, click **SAVE**.

**Viewing Attached Case List of Service Contacts**

You can view a list of cases that are attached to a specified service contact.

**Note:** If you plan to delete a service contact from your list of contacts, Tyler recommends that you first check to see if that contact is attached to any case filings.

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

1. On the Dashboard menu, click **My Service Contacts**.
   
   The **Service Contacts** page is displayed.

2. Locate the name of the service contact for whom you want to view the attached cases, and then click .

   If there are cases attached to the specified service contact, the list of cases is displayed in a window.
3. Click **Download Attached Cases** to download the case list to an Excel file.

The attached cases are listed on the Excel spreadsheet.

*Note: If there are no service contacts attached to a case, the following window is displayed.*

---

### Updating Information for a Case Service Contact

You can view a list of service contacts that are attached to a case. You can also update the information for a case service contact, if necessary.

To update the information for a case service contact, perform the following steps:

1. On the Dashboard menu, click **Filing History**.

   The **Filing History** page is displayed.
2. Locate the case for which you want to view the service contacts.

3. Click .

   The service contacts for the case are displayed.

4. Locate the service contact that you want to update, and then click .

   The Update Service Contact window is displayed.
5. Update the information for the service contact, and then click **Save**.

### Deleting a Service Contact

You can delete a contact from your service contacts list if you no longer need that contact.

To delete a service contact from the *Service Contacts* page, perform the following steps:

1. On the Dashboard menu, click **My Service Contacts**.
   
   The *Service Contacts* page is displayed.
Deleting a Service Contact

2. Locate the name of the service contact that you want to delete.

3. Click to immediately delete the service contact, or click to first view the cases that are attached to that service contact.

   Note: Once deleted, the contact is immediately removed from the service contacts list and from any case filings to which it was attached.
12 Filings

Topics covered in this chapter
◆ Copying the Envelope
◆ Viewing the Envelope Details
◆ Resuming a Case Filing
◆ Deleting a Draft Filing
◆ Canceling a Filing

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

Copying the Envelope

You can copy an envelope to create a new envelope to resubmit to the courts if the envelope has been returned or rejected for any reason.

To copy an envelope, perform the following steps:

1. On the Dashboard menu, click Filing History.
   
   The Filing History page is displayed.

   ![Figure 12.1 – Filing History Page](image)

2. In the Status pane, select Returned, and then click .
   
   The returned cases are displayed, per the filter that you set.
3. Locate the envelope that you want to copy.

4. Click the More Options drop-down list, and then select Copy Envelope.

Figure 12.2 – More Options Drop-Down List

A copy of the envelope is displayed on the Upload Documents page. A message indicates that the displayed envelope is a copy. You are asked to verify the information in the copied envelope before submitting it.

Figure 12.3 – Sample Upload Documents Page for a Copied Envelope

5. Navigate through the pages of the envelope to verify the information. Make any changes as appropriate.

6. After you have verified the envelope, click .
Viewing the Envelope Details

You can view the details of an envelope on the Filing History page.

To view the envelope details, perform the following steps:

1. On the Dashboard menu, click Filing History.
   
   The Filing History page is displayed.

2. Locate the specified case for which you want to view the envelope details.
3. Click .

The envelope details are displayed.

*Note: For subsequent filings, the envelope details do NOT include newly-added parties if the envelope has not been accepted yet.*

![Sample Envelope Details Page](image)

**Figure 12.6 – Sample Envelope Details Page**

4. Click to print a copy of the envelope details.

### Resuming a Case Filing

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

To resume a case filing, perform the following steps:

1. Locate the specified draft on the *Filing Drafts* page.
2. Click 

The filing opens on the Upload Documents page.

3. Navigate through the case filing to the page where you left off. Make any corrections to your entries as needed.

4. Continue completing the remaining required fields for the filing.

5. After you have completed all of the required fields, click 

Deleting a Draft Filing

You can delete a draft filing that you no longer need.

To delete a draft filing, perform the following steps:


   The Filing Drafts page is displayed.
2. Locate the draft filing that you want to delete, and then click "Delete".

The following warning message is displayed: Are you sure you want to delete Draft # "123"?

3. Click "OK" to delete the draft filing, or click "Cancel" to cancel the action.

If you clicked "OK", a confirmation message is displayed, and the draft filing is deleted.

Canceling a Filing

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

To cancel a filing, perform the following steps:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.
2. Locate the filing that you want to cancel.

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

3. Click 🗑️. The following warning message is displayed: **Are you sure you want to cancel this filing?**

4. Click **OK** to cancel the filing, or click **Cancel** to cancel the action.

   If you clicked **OK**, a confirmation message is displayed, and the filing is canceled.
Topics covered in this chapter
♦ Creating a Bookmark for a Case
♦ Removing a Bookmark from a Case
♦ Viewing a List of Bookmarked Cases

The Bookmarks page displays a list of case numbers, locations, and descriptions for the cases that you have bookmarked. Only you can see this information. Neither the public nor any user can see your case list.

Figure 13.1 – Sample Bookmarks Page

Creating a Bookmark for a Case

You can create a bookmark for a case from the Filing History page or the Filing Drafts page.

To create a bookmark for a case, perform the following steps:

1. On the Dashboard menu, click either Filing History or Filing Drafts.
   The page that you selected is displayed.

2. Locate the case or the draft filing that you want to bookmark, and then click .
   A drop-down list is displayed.

3. Select Bookmark Case.
   The case or draft filing that you bookmarked will now be displayed on the Bookmarks page.

Removing a Bookmark from a Case

You can remove a bookmark from a case that you previously bookmarked.

To remove an existing bookmark from a case, perform the following steps:

   The Bookmarks page is displayed.
2. Locate the case for which you want to remove the bookmark, and then click .
   
   A drop-down list is displayed.

3. Select Remove Bookmark.
   
   The following warning message is displayed: Are you sure you want to delete bookmark for Case # “CC-xy-abcd”?

4. Click OK to remove the bookmark, or click Cancel to cancel the action.

Viewing a List of Bookmarked Cases

You can view a list of the cases that you have bookmarked for quick access. You can filter your view to only the specific cases that you want to see.

To view a list of cases that you have bookmarked, perform the following steps:

   
   The Bookmarks page is displayed.

2. Set the parameters for the cases that you want to view, and then click .
   
   The cases that you selected in your filter are now displayed on the Bookmarks page.
Topics covered in this chapter

♦ Creating a Report

You can generate a report that can be used to reconcile financial transactions for envelopes and filings that you submitted. The report is available in a Microsoft Excel spreadsheet that you can download.

Creating a Report

To run a report, perform the following steps:

1. On the Dashboard menu, click Reports.

   The Reports page is displayed.

   ![Figure 14.1 – Reports Page](image)

2. Click to select the locations for which you want to run the report.

   The Select Locations dialog box is displayed.
3. Select the locations that you want to include in the report, and then click **DONE**.

4. Select the statuses that you want to include in the report.

5. Type the date range for the report, or click **Calendar** to select the dates from the calendar.

   **Note:** The date range that you select cannot exceed 60 days. If it does, an error message is displayed.

6. Click **DOWNLOAD REPORT**.

   The report is downloaded in a Microsoft Excel file, which you can filter and sort as needed. The report includes one tab for filings and one tab for envelopes.
15 Support and Feedback

Topics covered in this chapter
♦ Requesting Support
♦ Zendesk Support
♦ Providing Feedback
♦ Tyler Technologies Technical Support Contact Information

You can request technical support for the application, or you can provide feedback for the application.

Requesting Support

You can request support from Tyler regarding the application.

To request support regarding the application, perform the following steps:

1. Click in the eFile header.
   The Support / Feedback window is displayed.

   ![](Image 1)

   Figure 15.1 – Support / Feedback Window

2. Click .
   The Support window is displayed.

   Note: Your screen may vary from the example provided.
3. Click the support link that you want.

The appropriate Tyler support page is displayed in a new tab, depending on the link that you clicked.

4. Either click [BACK TO SUPPORT / FEEDBACK], or click [CLOSE].
A new Help icon has been added to every page in the application.

You can click the Help icon to open a chat modal.
In the chat modal, click **Get in touch**. Options are displayed for the method by which you want to communicate with the Support representative.

Click the option that you want to use, and then type your question in the chat window. A Support representative will assist you.
Providing Feedback

You can provide feedback to Tyler regarding the application if you want. You can also request a new feature.

To provide feedback regarding the application or to request a new feature, perform the following steps:

1. Click \( \text{Support / Feedback} \) in the eFile header.
   
   The Support / Feedback window is displayed.

   ![Support / Feedback Window](image)

   Figure 15.6 – Support / Feedback Window

2. Click \( \text{Give Feedback} \) .

   The Feedback window is displayed.
3. Select the appropriate option from the **Feedback Type** drop-down list.

4. Type your feedback regarding the application or suggestion for a new feature in the **Feedback** comments window.

5. Select the **"It is ok to contact me about this feedback"** check box if you want Tyler to contact you for more information, or leave the check box cleared if you do not want to be contacted.

6. Click **Submit Feedback**.

7. Either click **Back to Support / Feedback**, or click **Close**.
Tyler Technologies Technical Support Contact Information

For assistance, contact Tyler Technologies through the following resources.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Odyssey File &amp; Serve Support Hours</td>
<td>7:00 a.m. to 9:00 p.m. (CT), Monday through Friday</td>
</tr>
<tr>
<td>Odyssey File &amp; Serve Support Chat</td>
<td>Assistance is also available online through Support Chat.</td>
</tr>
<tr>
<td>Odyssey File &amp; Serve Email</td>
<td><a href="mailto:efiling.support@tylertech.com">efiling.support@tylertech.com</a></td>
</tr>
<tr>
<td>Odyssey File &amp; Serve Telephone</td>
<td>800.297.5377</td>
</tr>
<tr>
<td>GoTo Assist (Support)</td>
<td>Support may ask to assist you by sharing your screen using GoToAssist.</td>
</tr>
</tbody>
</table>