Odyssey File & Serve™ HTML5

Firm User Guide – Release 3.12

Copyright and Confidentiality

Publishing History

Document Publication Number	Revision	Date	Changes Made
OFS-FS-200-3432 v.1	Initial	October 2015	Document Creation

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Chapter 1 System Overview

Topics Covered in This Chapter

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

Release 3.12 New Features

This section lists the new features for Release 3.12.

Note: Features vary based on your system configuration.

Public Service Contacts

Note: The public service contacts feature is configured by Tyler and may not be available on your system.

When a service contact is created and associated with a case, it can be designated as a public service contact. When specified as public, the service contact can then be used by anyone outside your firm.

In addition, you can add service contacts from a public list to a case that you are starting or filing into.

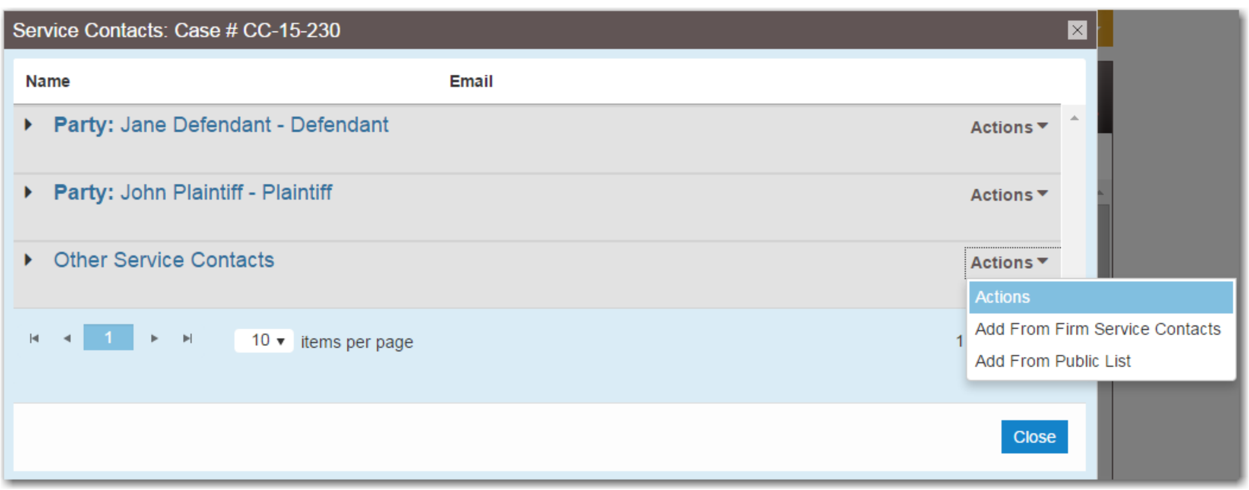

Figure 1.1 – Service Contacts: Case # CC-15-230 Page

Submission Agreements

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

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

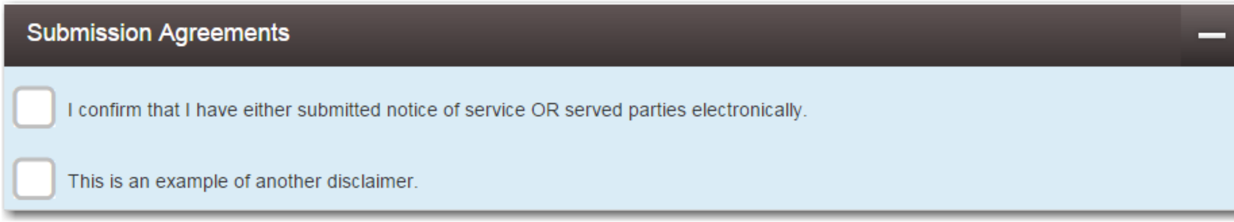

Figure 1.2 – Submission Agreements Dialog Box

Modify Service Method Field for Service Contacts

Filers can now modify the **Service Method** field of a service contact even if the service contact is owned by a different firm. This prevents filers from having to create a duplicate service contact.

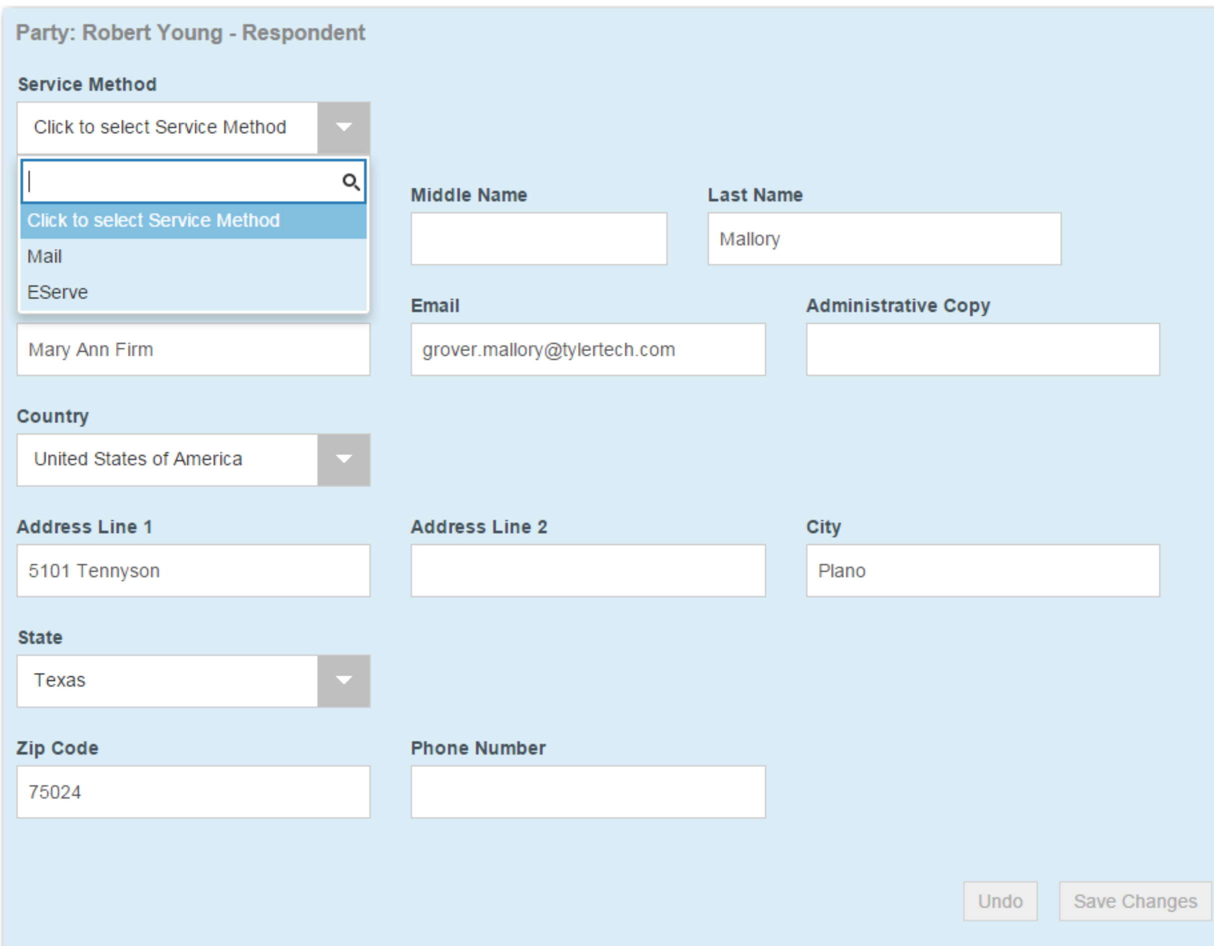

Figure 1.3 – Service Method Field in Service Contacts Section

Appellate Feature in Category Field

Note: The Appellate option is configured by Tyler and may not be available on your system.

A new selection, **Appellate**, is available in Release 3.12 in the case **Category** field. When you select **Appellate**, four new fields are displayed. The **Lower Case Number** and **Lower Court Name** fields are required. The **Lower Court Case Judge** and **Lower Court Case Description** fields are optional.

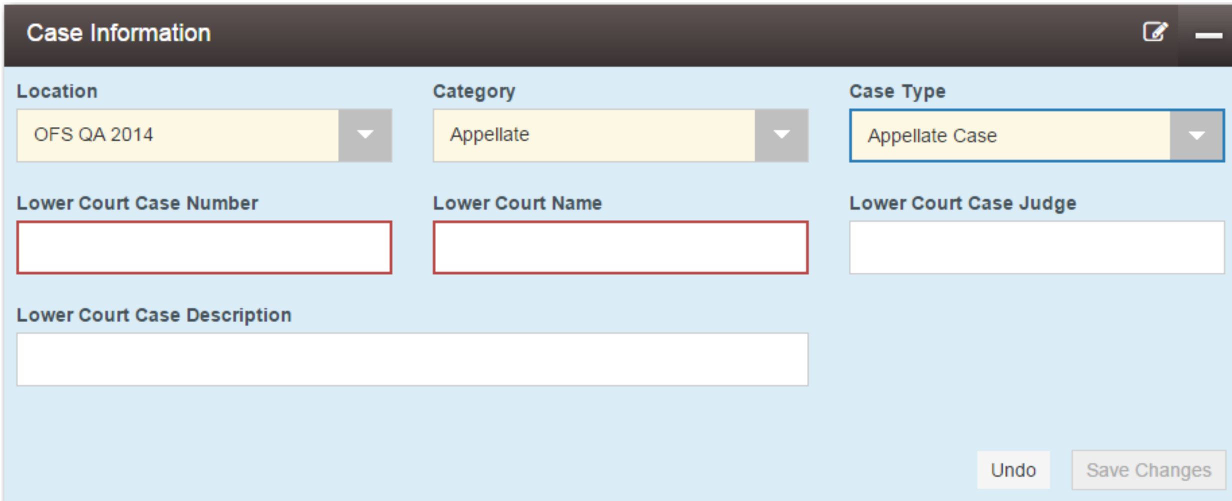

Figure 1.4 – Appellate Selections in the Case Information Section

Improved Support for Loading Cases with Large Numbers of Parties

The system now provides better support for filing into cases with large numbers of parties. When more than 100 parties are on a case, only the first party of each required type is displayed, along with a message that additional parties could not be displayed due to system constraints.

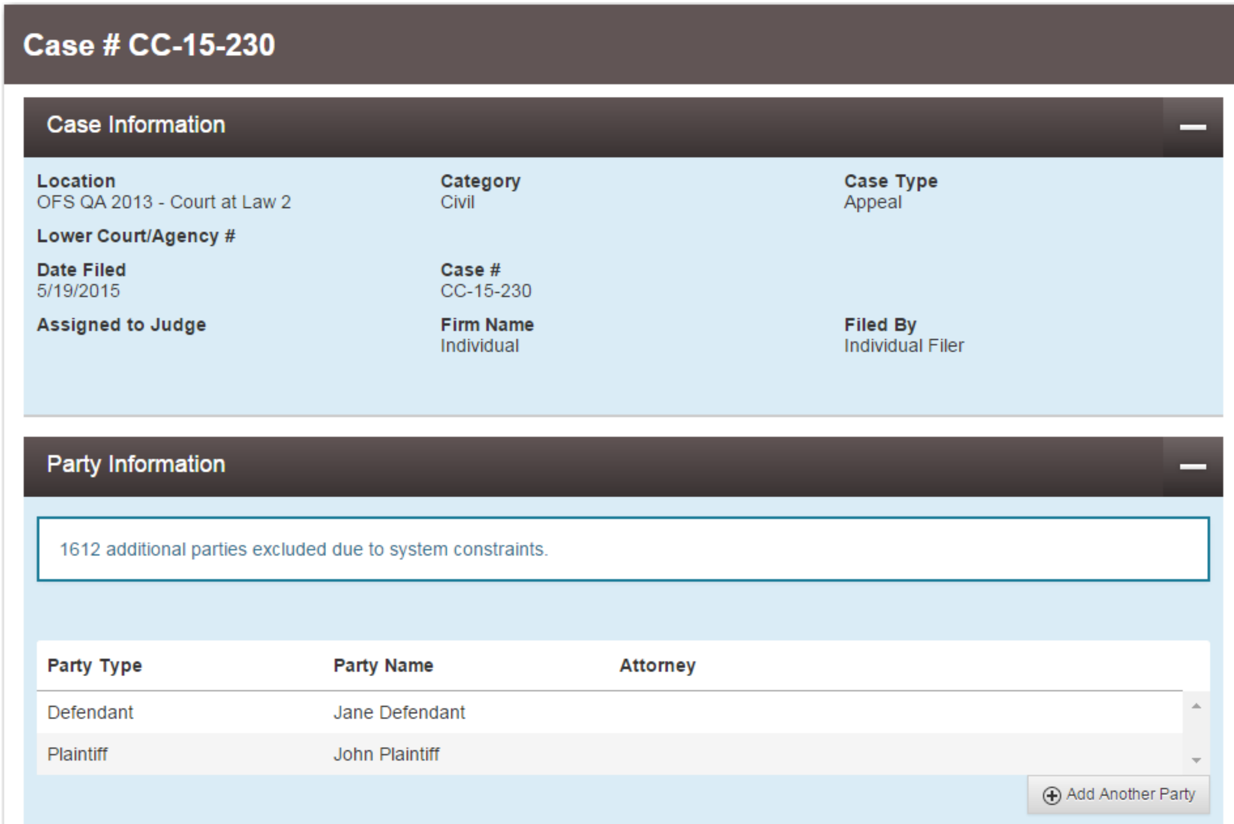

Figure 1.5 – Case Information and Party Information Sections on Case # CC-15-230 Page

Support for Due Date Field at Filing Code Level

The system now has the ability to collect and transmit the due date of an event by filing code and node.

Note: The Due Date field is configured by Tyler and may not be available on your system.

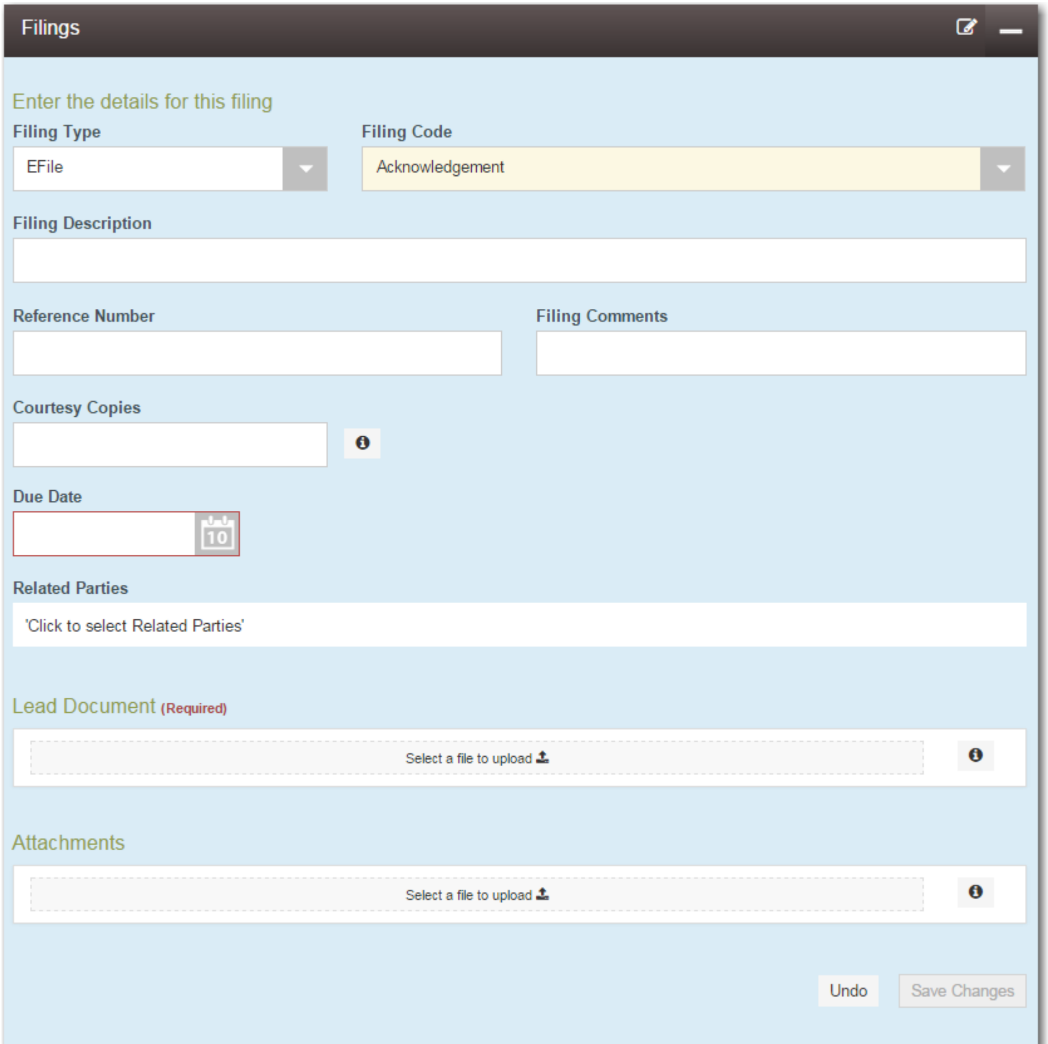

Figure 1.6 – Filings Section with Due Date Field

New Filing Status of "Returned"

Filings that are returned using the Send To Filer review action now show a new status of "Returned" instead of "Submitted" on the *Filing History* page.

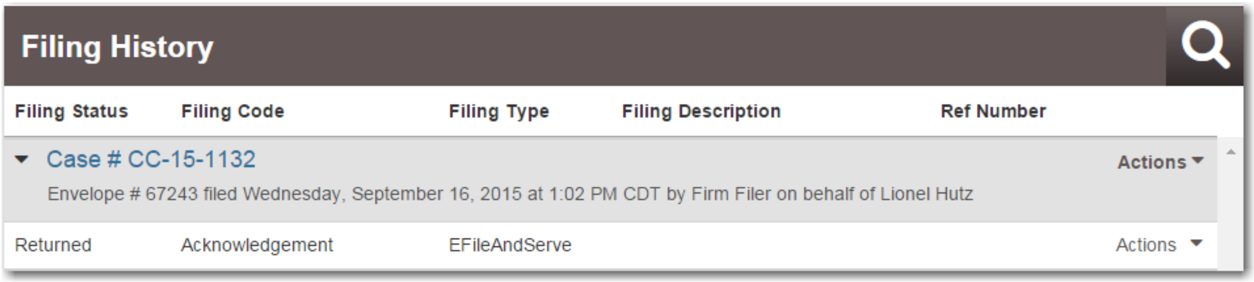

Figure 1.7 – Example of a Filing with the Filing Status of "Returned" on the Filing History Page

New Search Icon on the Filing History Page

The search icon on the *Filing History* page has been changed to a magnifying glass.

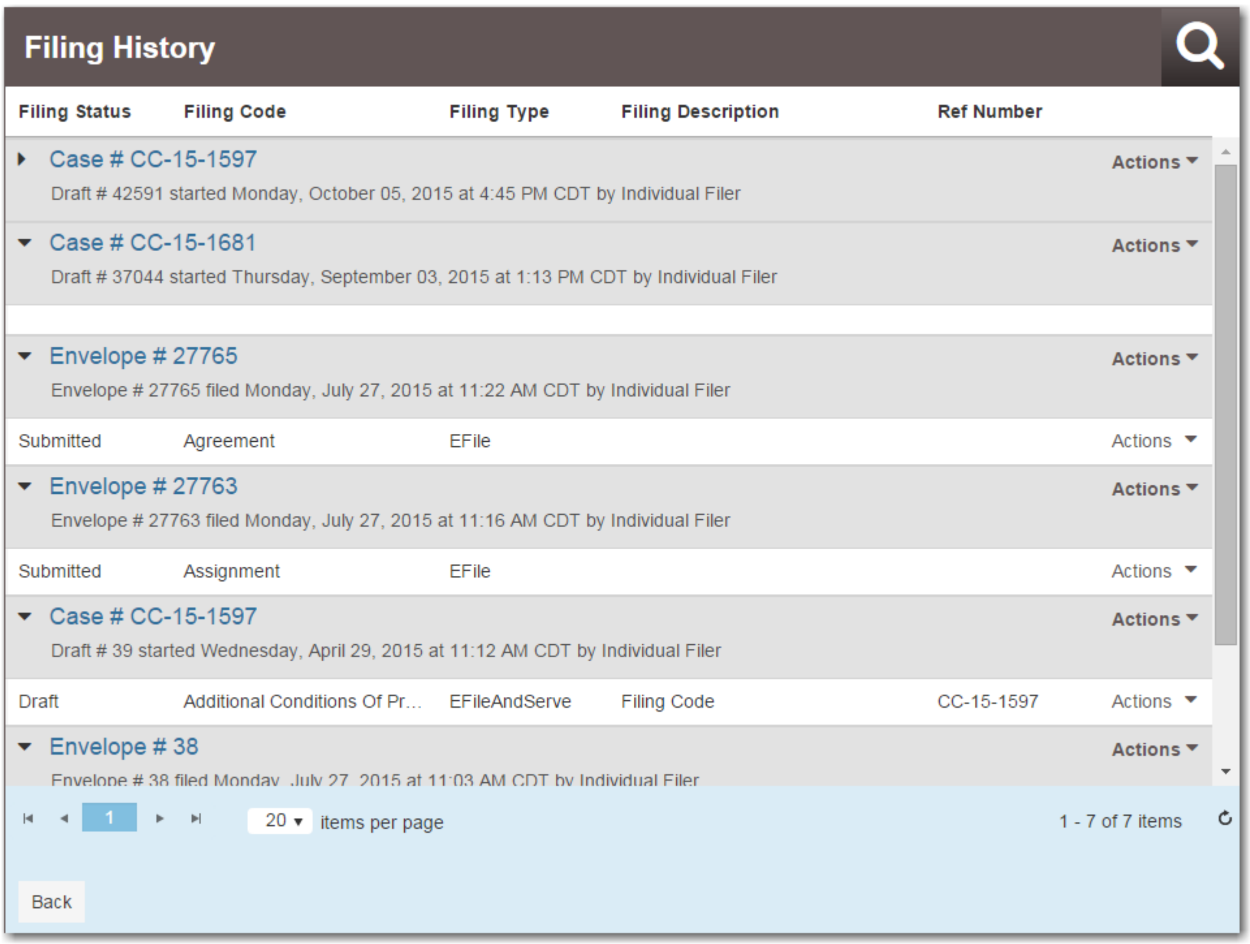

Figure 1.8 – New Magnifying Glass Icon on the Filing History Page

Hide Labels for Blank Fields in the Filing Section

The system has been updated so that when users are viewing the filing details of an envelope, the system no longer shows labels for fields that have no values.

For example, the **Firm Name** field is displayed only for users who belong to a firm. The **Lower Court/ Agency #** field is not displayed if no lower court has been assigned to the case. The **Filing Attorney** field is not displayed if the filer is an individual filer. And the **Filer Type** field is not displayed if no Filer Type value exists for the filing.

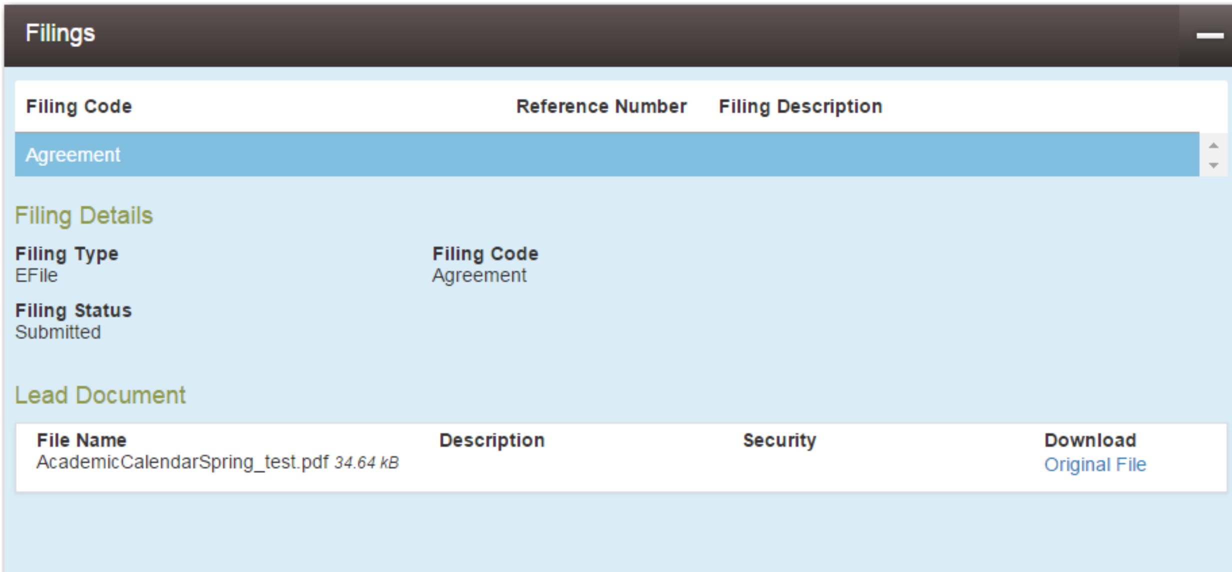

Figure 1.9 – Filings Section – Only Fields with Values Shown

Addition of Search and Paging Capability to the Firm Service Contacts Page

The system has been updated to display the firm service contacts on multiple pages and to allow for searching among the contacts. These improvements provide a more efficient way to handle a large number of contacts.

The paging is activated when more than 10 service contacts exist in the system. You can select the number of items per page to be displayed: 10, 25, or 50.

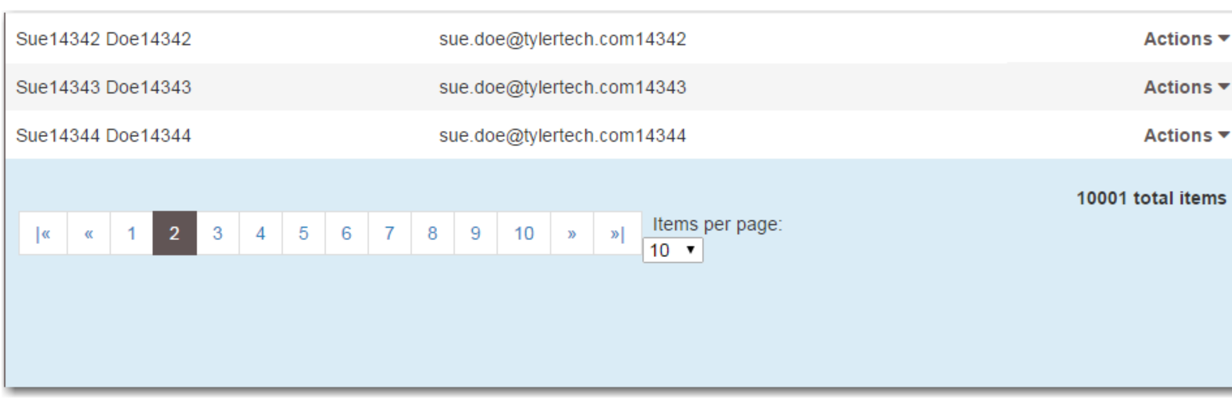

Figure 1.10 – Firm Service Contacts Page with Paging Feature

Also, you can search for a specific service contact by typing part of or the entire contact's name in the text box on the *Firm Service Contacts* search page.

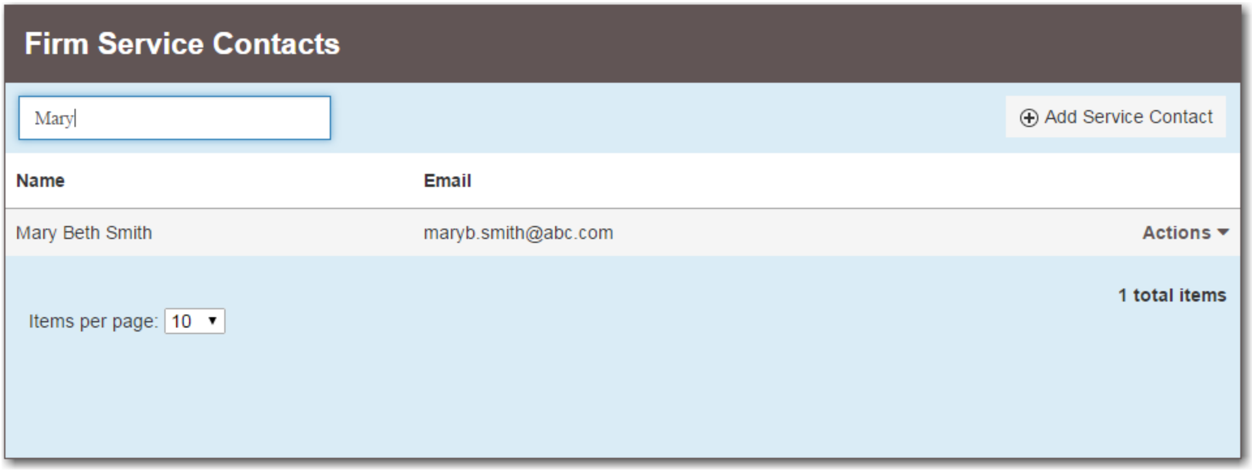

Figure 1.11 – Firm Service Contacts Search Page

View Attached Case List of Service Contacts

You can now use the Service Contacts list to view the list of cases attached to a service contact.

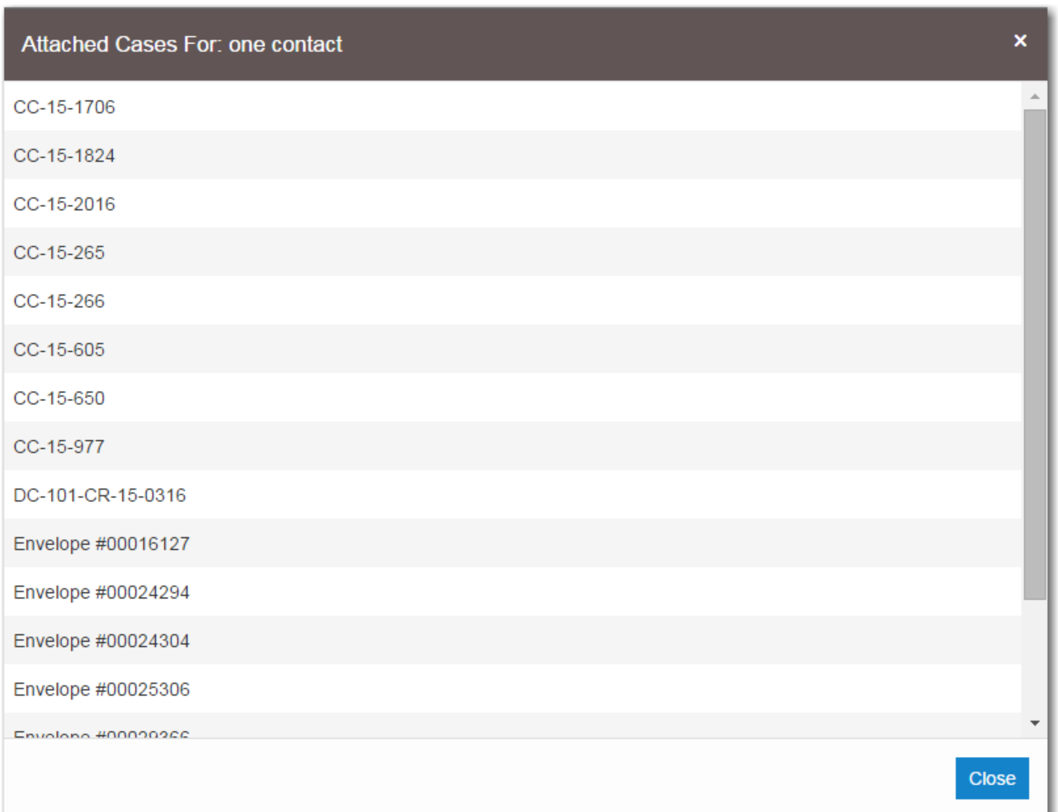

Figure 1.12 – Attached Cases For: one contact Page

Select Filing Attorney for Existing Case Envelopes

The **Filing Attorney** field has been moved from the **Case Information** section to the **Fees** section. The new location streamlines the filing process and allows filers to select the filing attorney when filing into an existing case.

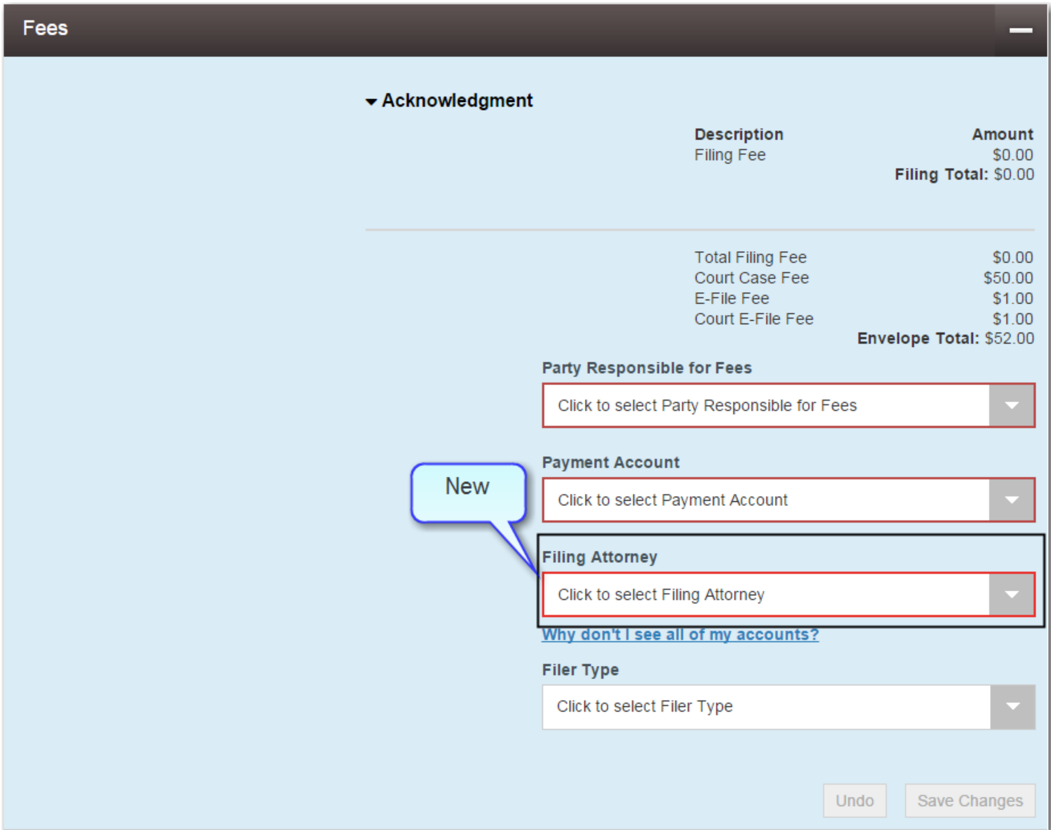

Figure 1.13 – Fees Section with Filing Attorney Field

Default Filing Type for Existing Case Filings

The system has been updated to allow for a default filing type to be configured for existing case filings. The default filing type can be set to **EFileAndServe** or just **EFile**.

Note: Serve is not a default option.

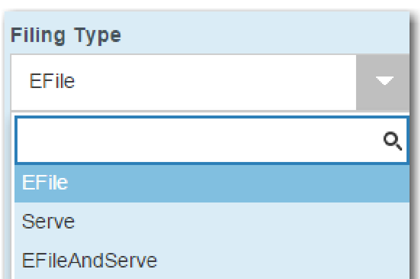

Figure 1.14 – Filing Type Field

Party Information Section Expanded for Existing Case Filings

The system has been updated so that the **Party Information** section is no longer collapsed by default. When filing into an existing case, filers are now able to immediately view the parties associated with the case.

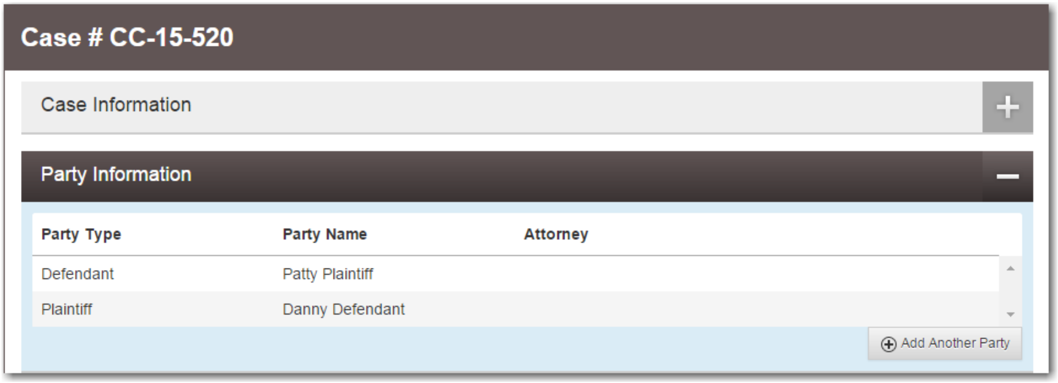

Figure 1.15 – Party Information Section Expanded for Existing Cases

Improved Visibility of Templates Favorite Icon

The system now displays a more visible Favorite icon when a template is being edited.

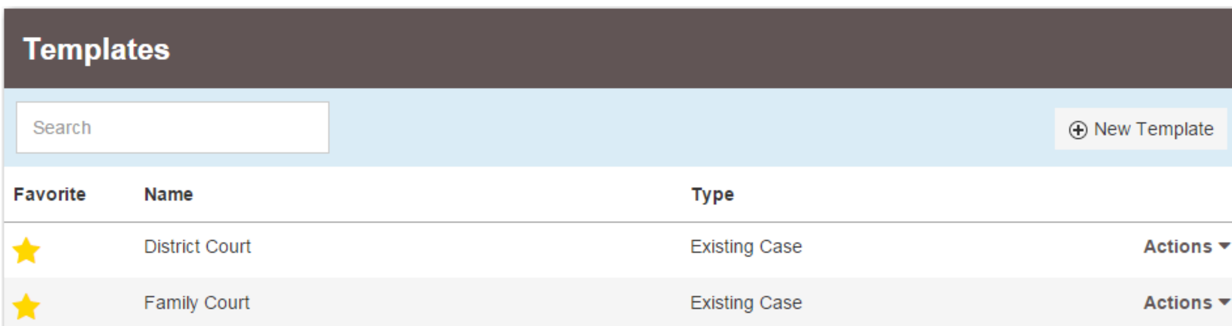

Figure 1.16 – Templates Page with Favorite Icons Displayed

Expand All Sections When Filing Details Are Viewed

The system has been updated so that all sections are expanded when filers view the filing details of an envelope.

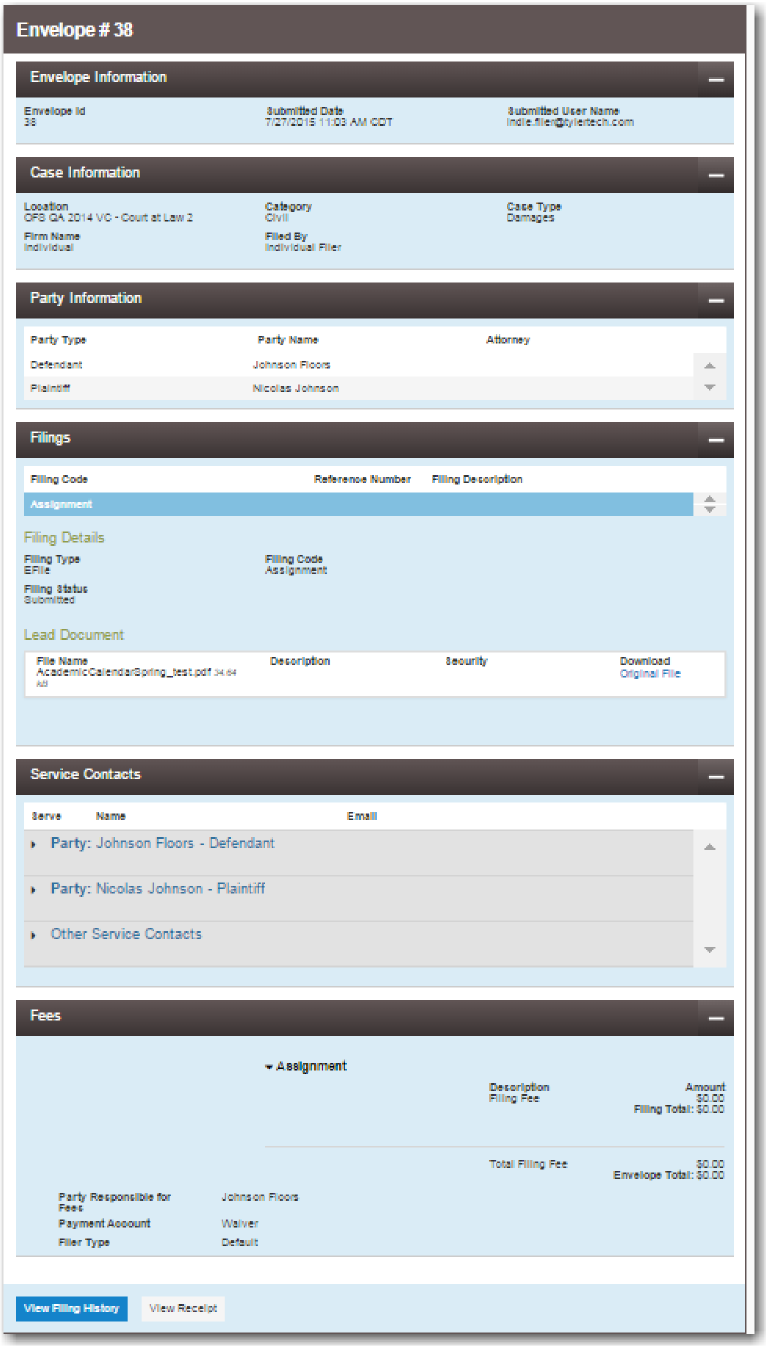

Figure 1.17 – Expanded Sections of an Envelope When Filing Details Are Viewed

Before You Begin

This guide is intended for firm users.

Firm User

Only Firm Administrators can add and manage firm users. Please contact your Firm Administrator to request any changes.

Payment Accounts

Only Firm Administrators can add and manage payment accounts. Please contact your Firm Administrator to request any changes.

Attorneys

Only Firm Administrators can add and manage firm attorneys. Please contact your Firm Administrator to request any changes.

Setup

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

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

System Requirements

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

- **Browser Requirements** – The system supports Internet Explorer® 10 or 11; Chrome™; Mozilla® Firefox®; or Safari® application program. If your browser does not meet these minimum requirements, please contact your network administrator.
- **Operating Systems** – The system supports Microsoft® Windows®, Linux®, Chrome OS™, Android™, and OS X® operating system software.

  Note: iOS is not supported.
- **Minimum Hardware Requirements** – The system supports the following hardware:
  - Intel® Core™ Duo processors or AMD processor manufactured in 2012 or later
  - 2 GB of RAM
  - 1366 x 768 resolution screen for desktop or 1280 x 720 resolution screen for mobile devices
- **Recommended Hardware Requirements** – Tyler recommends the following hardware:
  - Intel® Core™ i3 or AMD A6 processor with at least 2.0 GHz clock speed
  - 4 GB of RAM
  - 1920 x 1080 resolution for both desktop and mobile devices
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Document Format** – PDF is the only format allowed for attaching documents when using the system.

Page Navigation

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

Keyboard Shortcuts

At any time while you are in the File & Serve system, you can use keyboard shortcuts for assistance. Press SHIFT+? to display the following window.

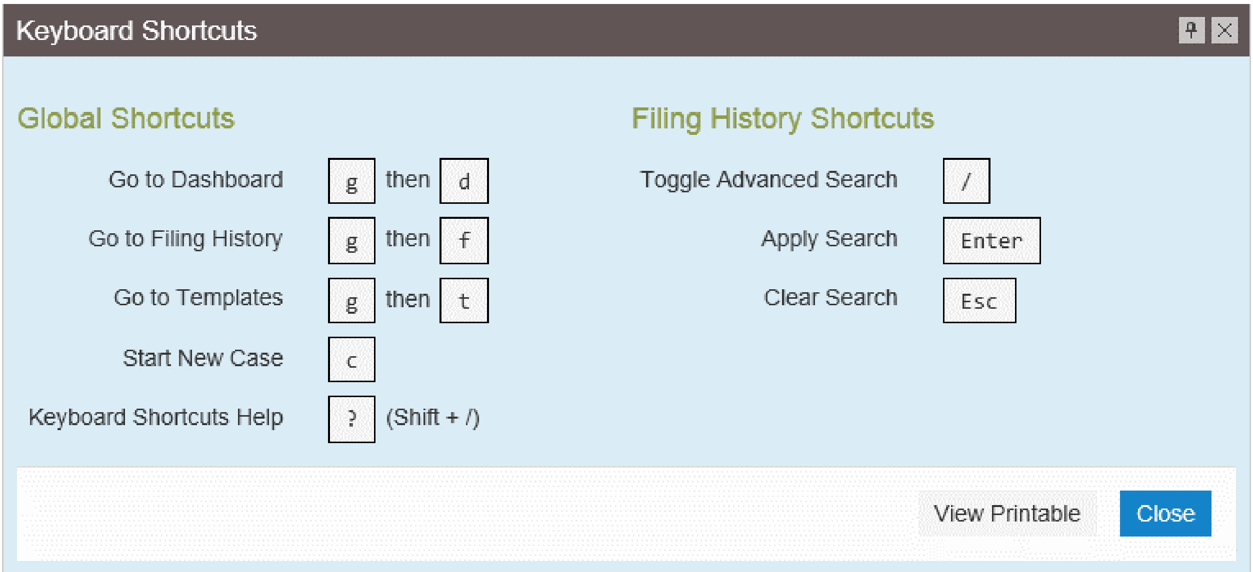

Figure 1.18 – Keyboard Shortcuts Window

Press any shortcut key to initiate an action depending on the key you pressed. The keyboard shortcuts are designed to make your experience flow more smoothly and to help you to gain efficiency in using the system.

Resume Filing

During the filing process, the system automatically saves a draft of each page on which you have completed all required fields. This feature allows you to stop work on a filing and resume at a later time. To resume filing a saved draft, navigate to the *Filing History* page and find the draft that you want to complete. From the **Actions** drop-down list, select **Resume Draft Envelope**.

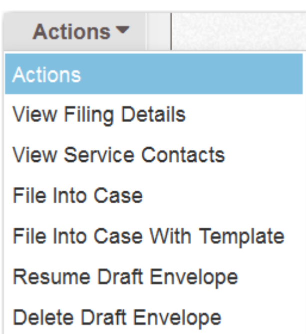

Figure 1.19 – Actions Drop-Down List

Error Messages

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

Enter Data in Required Fields

Required fields are outlined in red on your form. If the information is not entered in the required fields, you will receive error messages when you try to advance to the next page.

Note: Required fields may vary in different sections.

ORIENTATION

When you sign in to File & Serve, the *Filer Dashboard* page is displayed. From here, drop-down lists provide various filing options.

Filer Dashboard and Actions Drop-Down List

Start a new case or add a filing to an existing case, using one of two methods:

- From the *Filer Dashboard* page

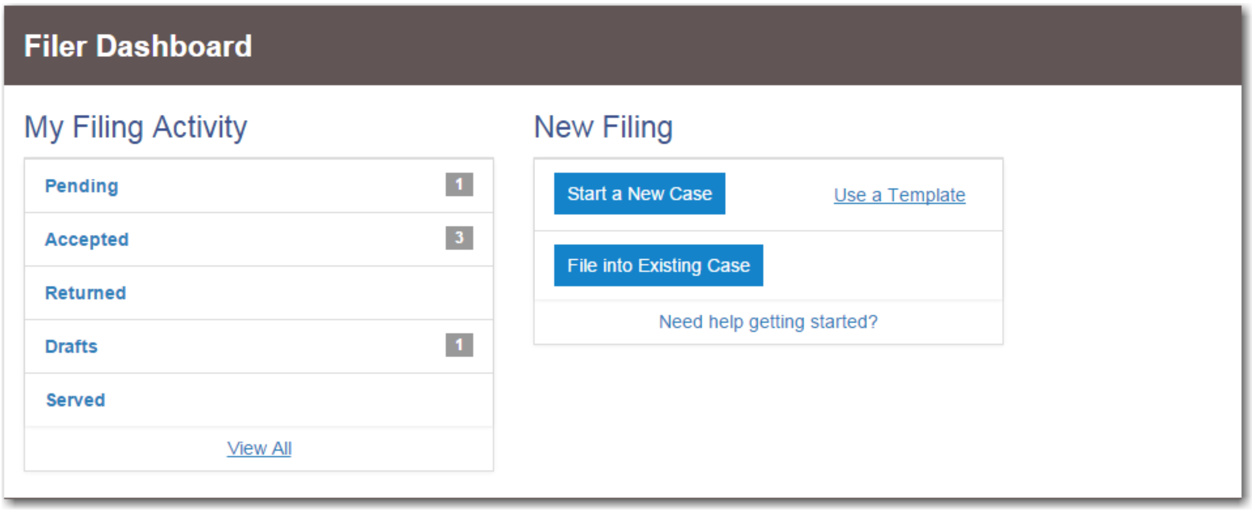

Figure 1.20 – Filer Dashboard Page

From the **Actions** drop-down list

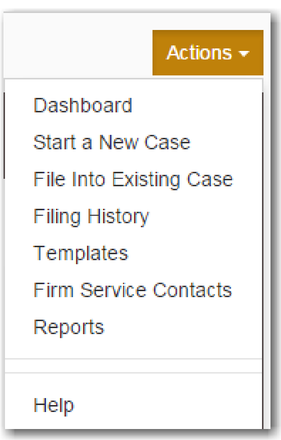

Figure 1.21 – Actions Drop-Down List

The **Actions** drop-down list can also be used for other case actions.

Start a New Case

Click **Start a New Case** to open a new case and enter the required information. You can also select **Start a New Case** from the **Actions** drop-down list.

File Into Existing Case

Click **File into Existing Case** to locate an existing case and add a filing to the case. You can also select **File Into Existing Case** from the **Actions** drop-down list.

Filing History

After uploading and submitting your filing, it is displayed on the *Filing History* page. From here, you can view the status of your filing, check the filing type, get a document description, see the number assigned to your case, review the details of the case, and cancel a filing.

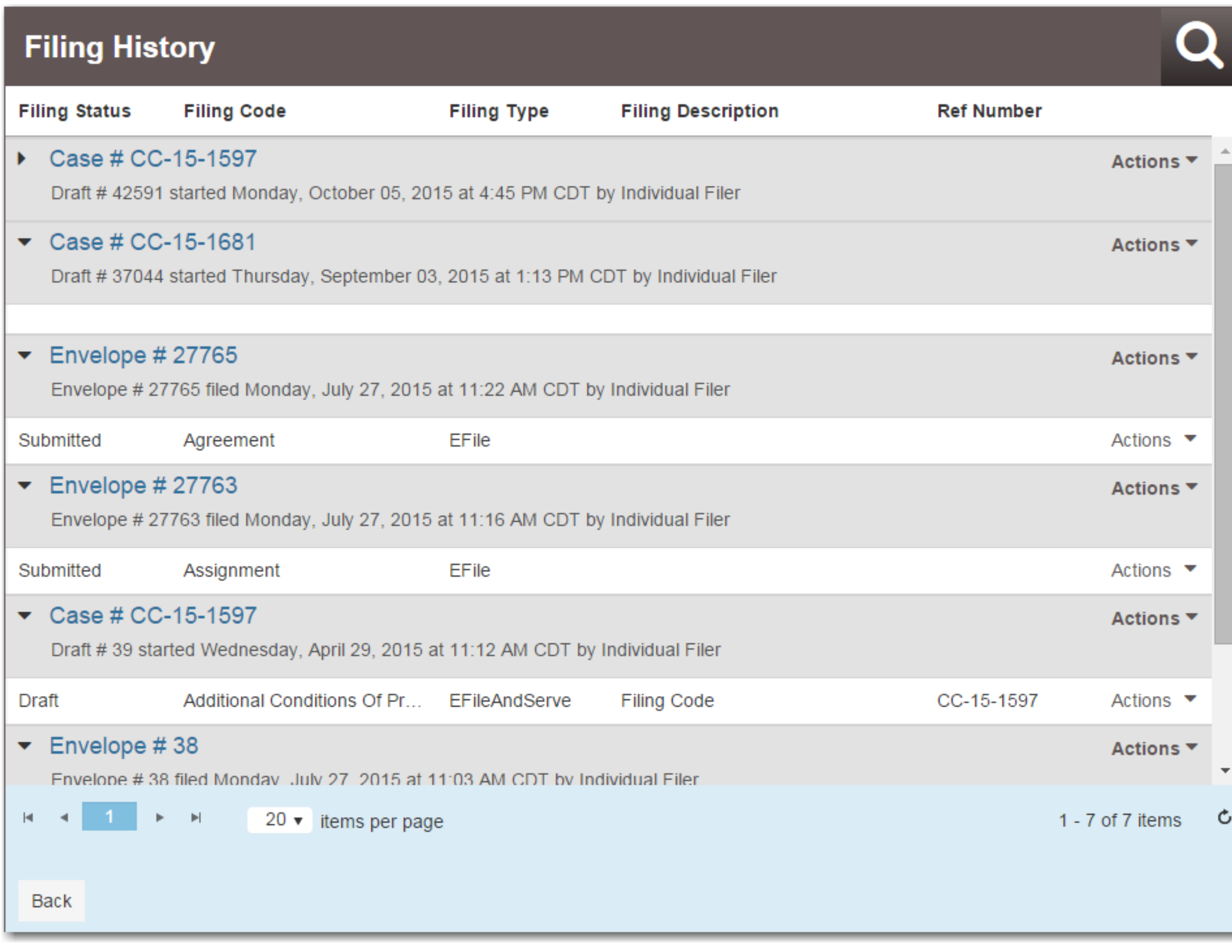

Figure 1.22 – Filing History Page

Templates

Envelope templates allow you to quickly file into a case or create a new case from a template that you have created, saving you time. Templates exist for new case filings and existing case filings.

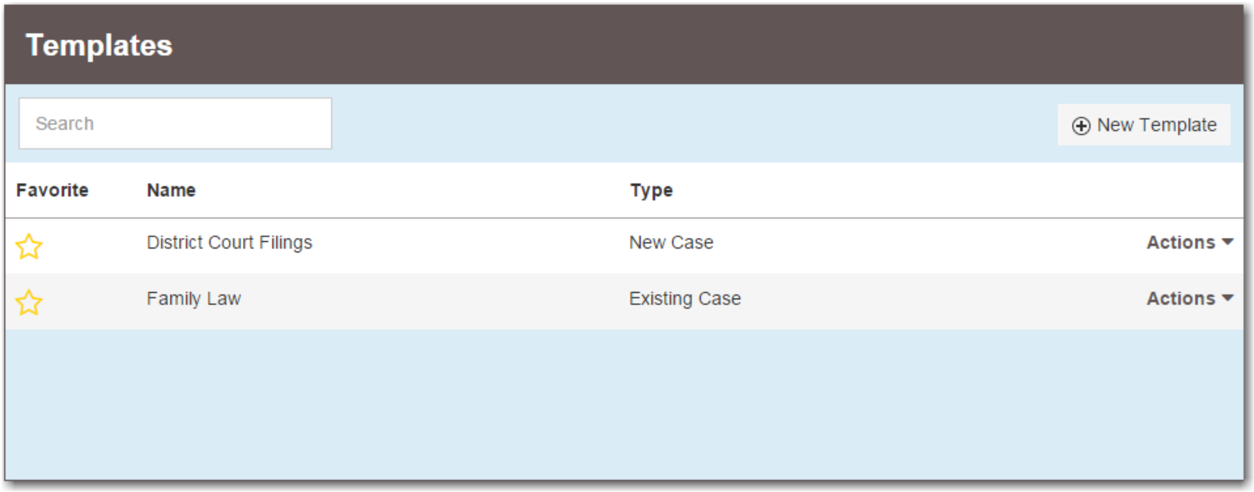

Figure 1.23 – Templates Page

Firm Service Contacts

The **Firm Service Contacts** feature displays all of the service contacts associated with your firm. Firm service contacts can also be deactivated from a firm.

Reports

You can create reports on your filing activity and export the reports into an easily accessible Microsoft® Excel® file.

The Financial Reconciliation Report contains a report at the **Envelope** level that is designed to help you reconcile your filing fees to your credit card statements.

The Filings Report is a detailed look into every filing, filing status, and fee associated with the filings that your or your firm performed.

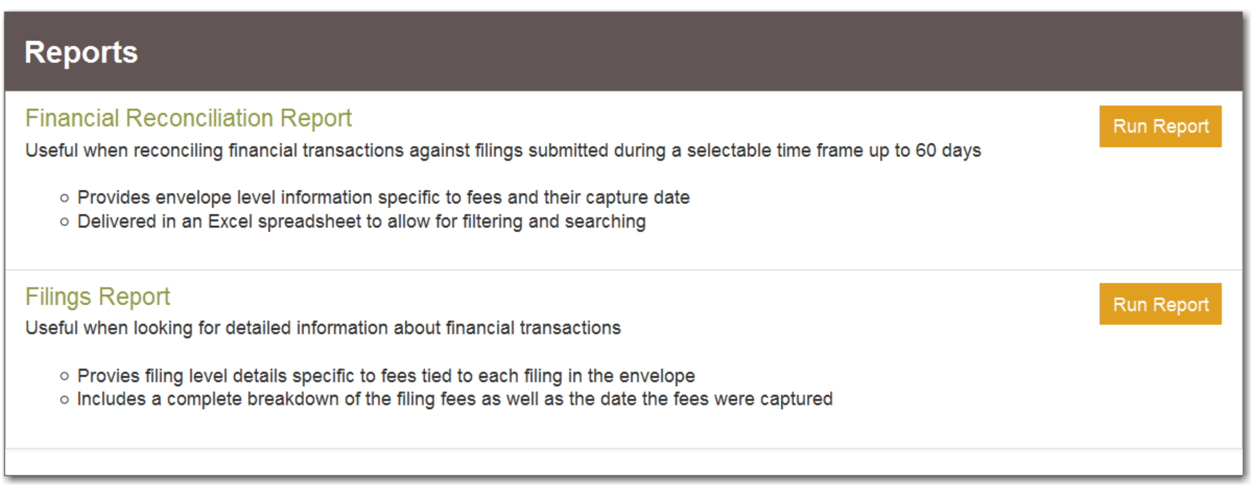

Figure 1.24 – Reports Page

Help

Select **Help** from the **Actions** drop-down list to view additional training materials, contact information, and **Self-Service Support**.

CHAPTER 2 E-FILING OVERVIEW

TOPICS COVERED IN THIS CHAPTER

♦ FILING QUEUE STATUS

This section describes the e-filing process.

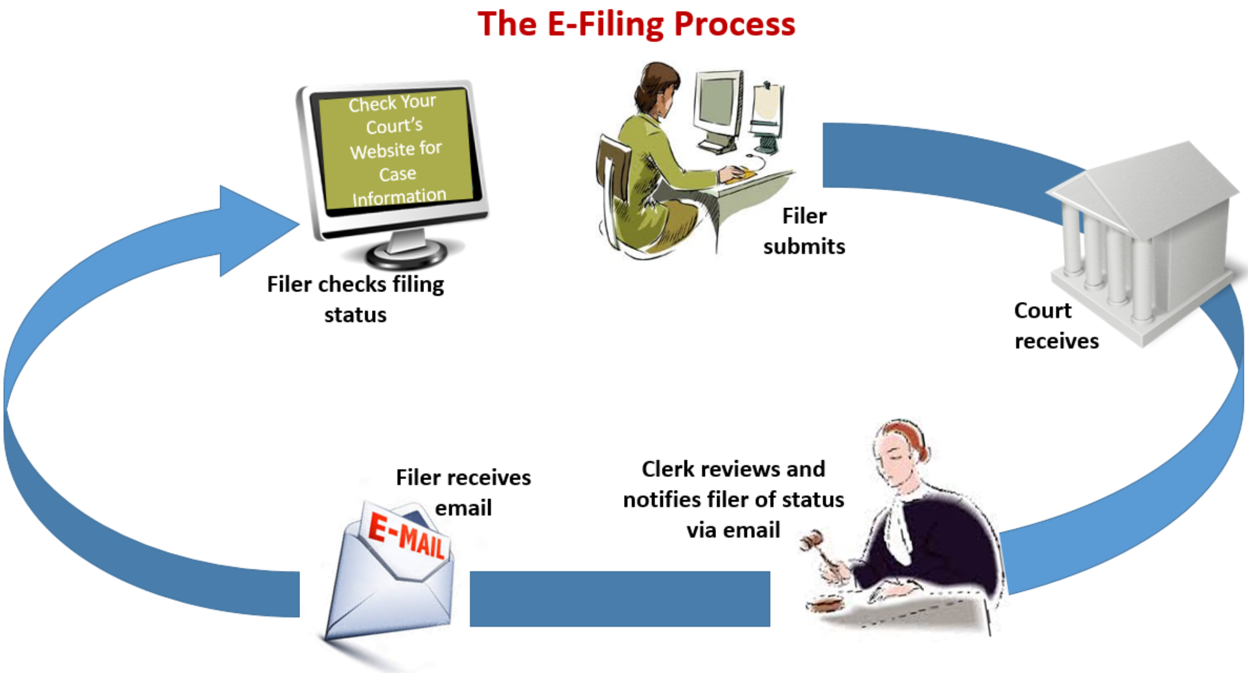

Figure 2.1 – The E-Filing Process

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

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

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

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

FILING QUEUE STATUS

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

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

Status	Filing Type	Definition
Draft	EFO, EFS, SO	The filer has entered full or partial filing data, but has not yet submitted the filing.
Submitting	EFO, EFS, SO	The filer has submitted the filing, but the document file format and payment information have not been verified on the back end.
Submitted	EFO, EFS, SO	The document file format and payment information have been verified and accepted, but the filing has not yet entered the Review Queue/Workflow Process.
Court Processing	EFO, EFS, SO	Some additional action needs to be taken by the court.
Under Review	EFO, EFS	A clerk reviewer has selected a filing from a queue. **Note: Once a filing reaches the Under Review status, it cannot return to the Submitted status. Selecting the End Review retains the Under Review status and returns the filing to the queue.**
Receipted	EFO, EFS	The reviewer has received the document, but some additional action needs to be taken by the court. Example: In a proposed order, the proposed order is receipted, and then the document is routed to the judge for review and signing.
Accepted	EFO, EFS	The reviewer has reviewed the filing and accepted it.
Rejected	EFO, EFS	The reviewer has reviewed the filing and rejected it.
Returned	EFO, EFS	The reviewer has reviewed and returned the filing as additional action must be taken by the filer. **Note: The filer can cancel or copy a filing in the Returned status.**
Served	SO	Service Only filings are completed.
Service Incomplete (Service Only filings)	SO	One or more servings failed; the service was incomplete. Example: The email or domain was rejected.

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

Chapter 3 Home Page

Topics Covered in This Chapter

♦ Registering as a Firm User
♦ Resetting Your Password

The home page serves as the gateway to the system. From this page, you can register, sign in, view training sessions, and get contact information for Technical Support.

Note: To join a firm, request an invitation from your Firm Administrator.

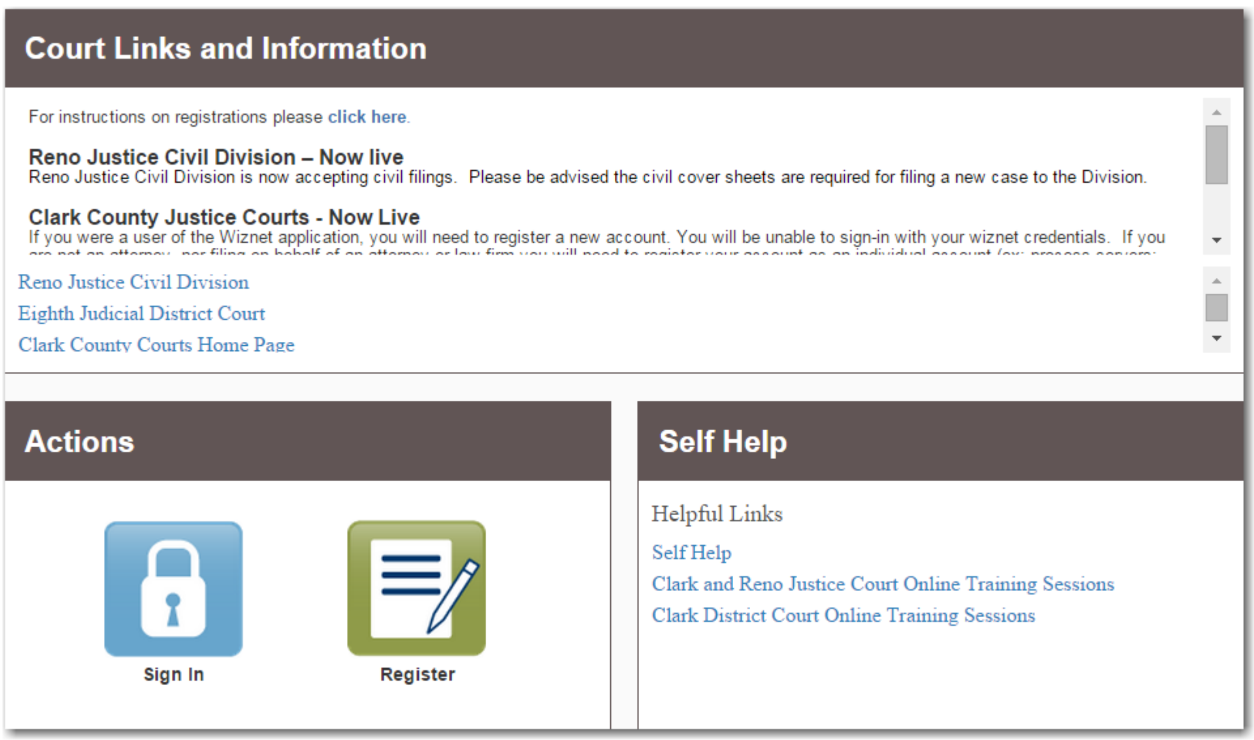

Figure 3.1 – File & Serve Home Page

Court Links and Information

The **Court Links and Information** panel provides links to the courts in your area. Click those links to access detailed information about the courts, including their location and general information about each court.

Actions

The **Actions** panel is where you sign in to the system or register as a user.

The **Sign In** area is where you sign in to and use the File & Serve system. Type your email address and password to sign in to File & Serve.

The **Register** link takes you to the page where you can register in the system by using your name and contact information. File & Serve requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

Self Help

The **Self Help** panel contains links to online training sessions as well as answers to questions regarding e-filing.

REGISTERING AS A FIRM USER

You can create an account with a firm and register as a firm user after being invited to join the firm.

Note: If you would like to have an account with the File & Serve system, please contact your Firm Administrator. Your Firm Administrator can invite you to join the firm through email. Follow the link provided in the email, and you can join the firm in the File & Serve system.

Perform the following steps to register as a firm user:

1. Click the link in the invitation email to join a firm.

You have been invited to join firm GF Law. Please use this link to begin electronic filing with Odyssey File and Serve.
https://PLADVSVOFSANO1//OfsWeb/UserModule/Registration?firm=75de1a69-033e-43f4-9b9a-35c0388f2b79

Figure 3.2 – Example of Firm User Invitation Email

   Note: If you do not have an invitation email, request one from your Firm Administrator.

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

   After you click the link, the *Register* page opens.

2. Complete the required fields outlined in red font: **First Name**, **Last Name**, **Email Address**, **Password**, **Security Question**, and **Security Answer**.

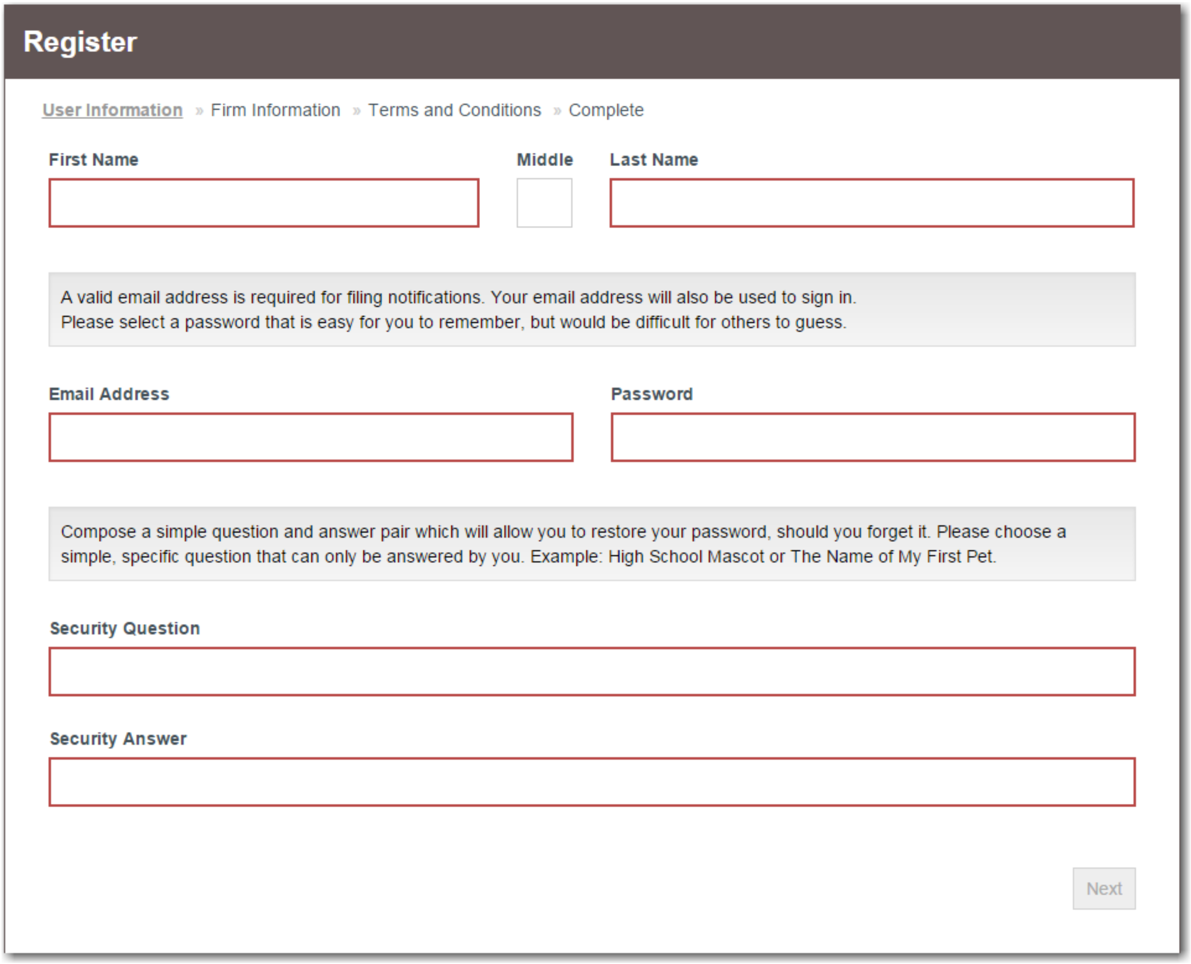

Figure 3.3 – Register Page for Firm User

3. Click 

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   The next page opens, displaying the firm you were invited to join.

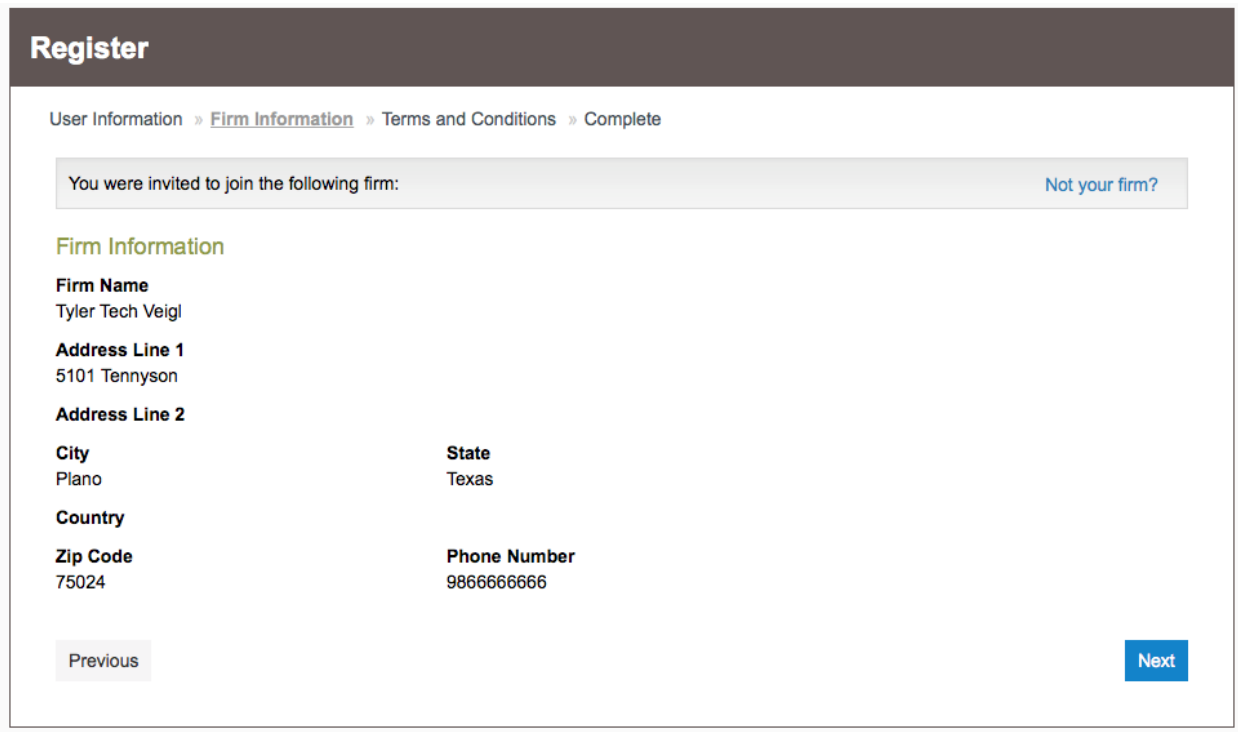
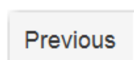


Figure 3.4 – Register Page with Firm Information

4. Click 

to continue with your registration, or click 

to return to the previous page.
5. If you choose to continue with your registration, the *Register* page opens. Read the agreement before proceeding.

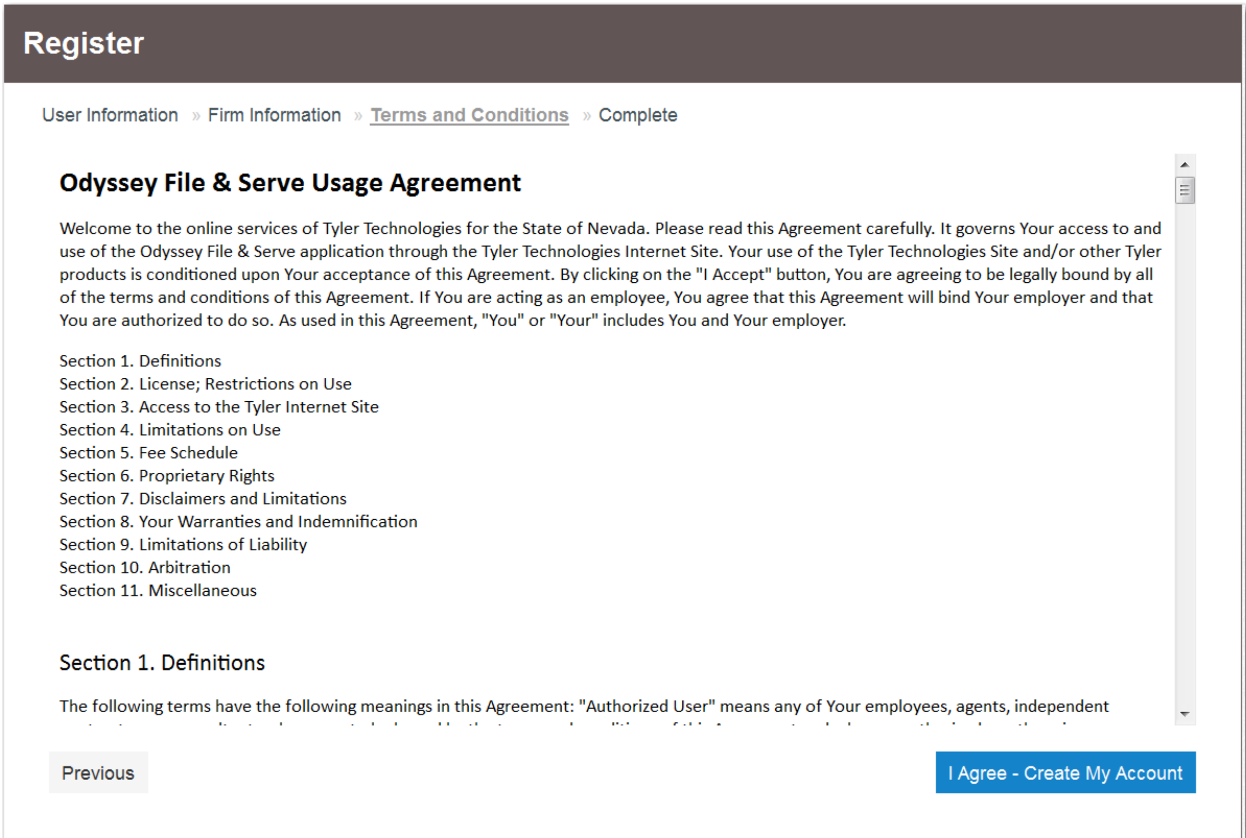


Figure 3.5 – Register Page with Usage Agreement

6. Select **I Agree - Create My Account** to accept and agree to the terms listed on your page. If you do not want to continue with your registration, click **Previous** to return to the previous page.
7. If you continue with your registration, a confirmation page opens, and a verification email is sent to the email address you provided.

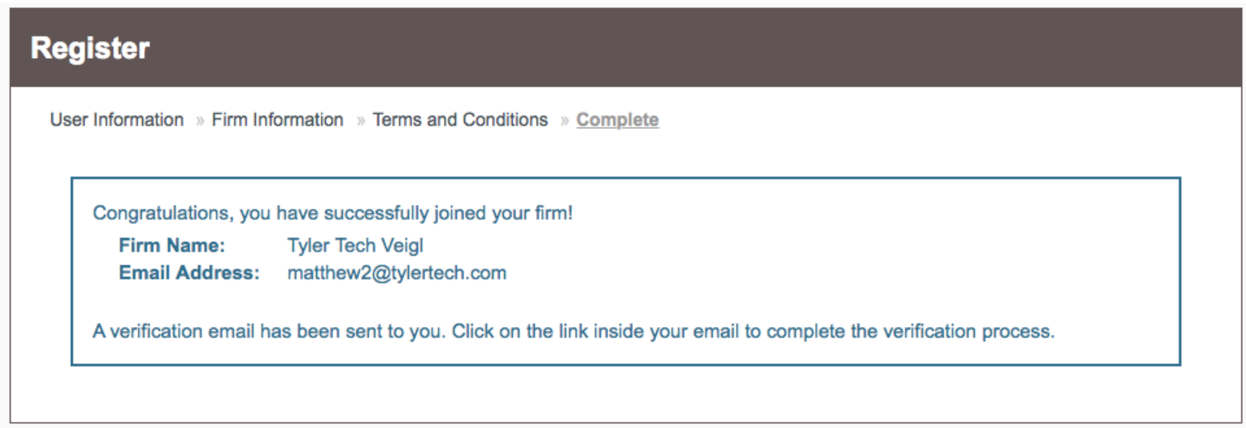
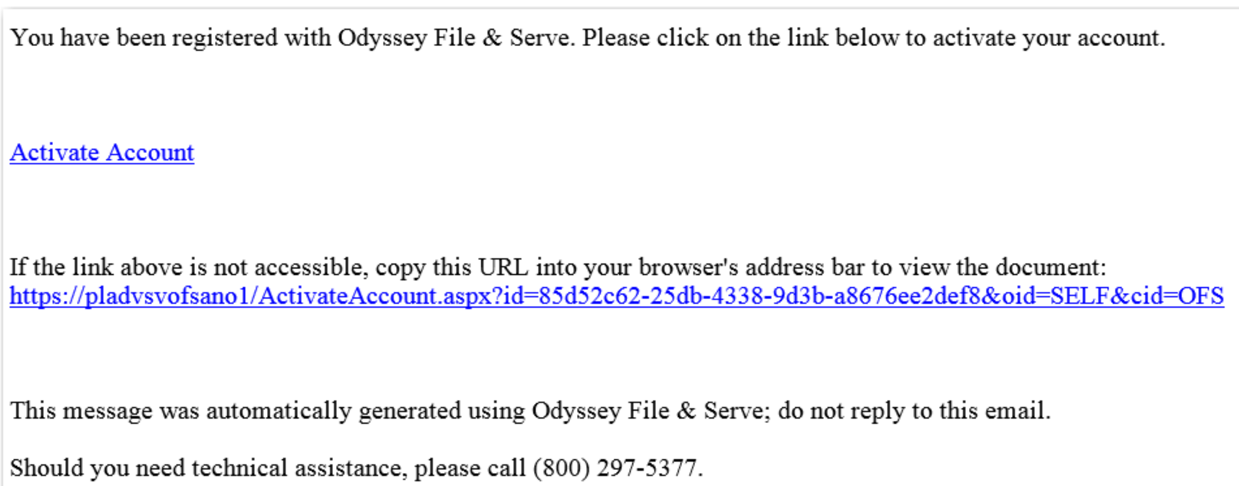


Figure 3.6 – Register Page with Confirmation

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


You have been registered with Odyssey File & Serve. Please click on the link below to activate your account.

Activate Account

If the link above is not accessible, copy this URL into your browser's address bar to view the document:
https://pladvsvofsano1/ActivateAccount.aspx?id=85d52c62-25db-4338-9d3b-a8676ee2def8&oid=SELF&cid=OFS

This message was automatically generated using Odyssey File & Serve; do not reply to this email.

Should you need technical assistance, please call (800) 297-5377.

Figure 3.7 – Verification Email

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

Resetting Your Password

If you have forgotten your password, type the email address you used during registration and then click Forgot Password? .

Note: Your password is case sensitive. Ensure that Caps Lock is not on.

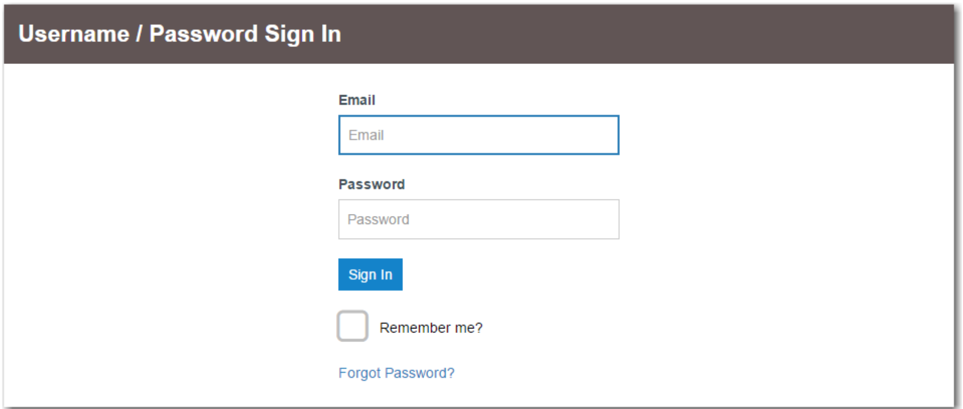


Figure 3.8 – Username / Password Sign In Page

To reset your password, perform the following steps:

1. Click Forgot Password? on the *Username / Password Sign In* page.

   A page opens requesting that you type your email address.

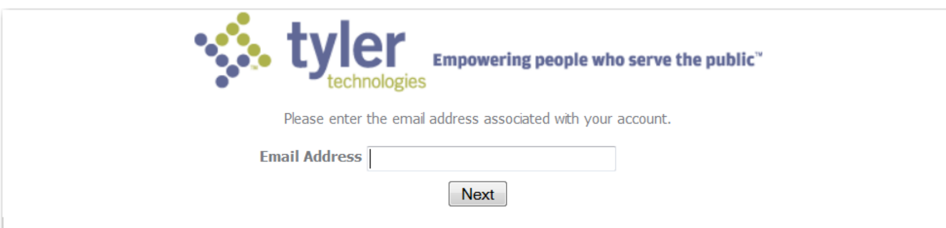


Figure 3.9 – Change Password Page

2. Type the email address that you provided during the registration process in the **Email Address** field.
3. Click Next to continue.
4. Type your answer in the **Security Answer** field.
5. Click Reset Password.

   The system displays this message: `A password reset link has been sent to the email address associated with your account. If you do not see the password reset email in your Inbox, please check to see if it was delivered to your spam folder.`
6. Check your email inbox.
7. Locate the email from File & Serve.
8. Click the link labeled click **here** to reset your password.

   You will be prompted to create a new password.
9. Enter a new password in the **New Password** field.
10. Re-enter your new password in the **Repeat New Password** field.
11. Click **Change Password**.

    A confirmation page displays the following message: `Your password has been changed successfully.`

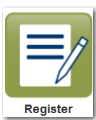
CHAPTER 4 SIGN IN AND SIGN OUT

TOPICS COVERED IN THIS CHAPTER

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

SIGNING IN

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

Note: Click 

to register if you have not registered before.

Perform the following steps to sign in:

1. Navigate to the home page.
2. Click 

.
3. Type your email address and password (case sensitive) in the fields provided.

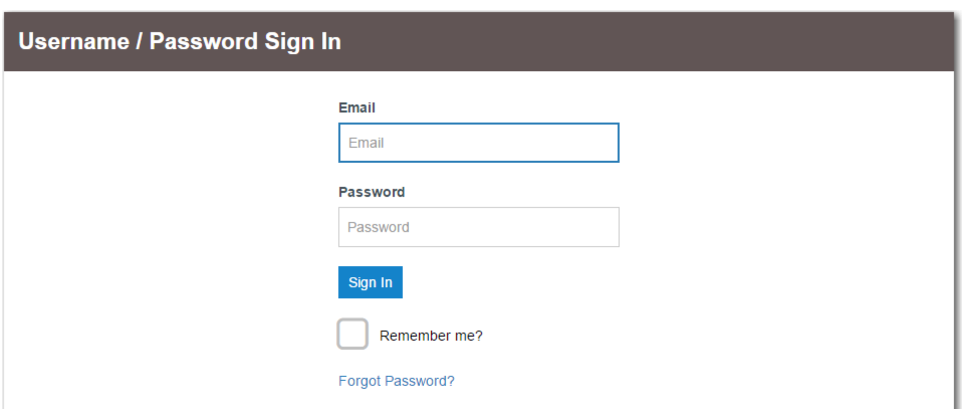


Figure 4.1 – Username / Password Sign In Page

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

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

SIGNING OUT

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

Perform the following steps to sign out:

1. From the profile drop-down list on the page, click **Sign Out**.

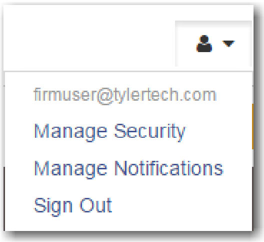


Figure 4.2 – Sign Out Option on Profile Drop-Down List

The *Sign Out* page is displayed.

Figure 4.3 – Sign Out Page

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

Chapter 5 Profile Preferences

Topics Covered in This Chapter

The profile drop-down list provides options for changing your password and managing your notifications.

Changing the User Password

Change your password from the *Manage Security* page.

Perform the following steps to change the user password:

1. From the profile drop-down list, select **Manage Security**.

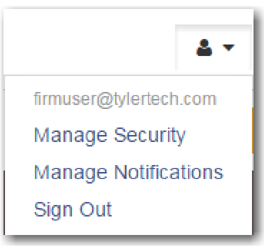


Figure 5.1 – Profile Drop-Down List

The *Manage Security* page opens.

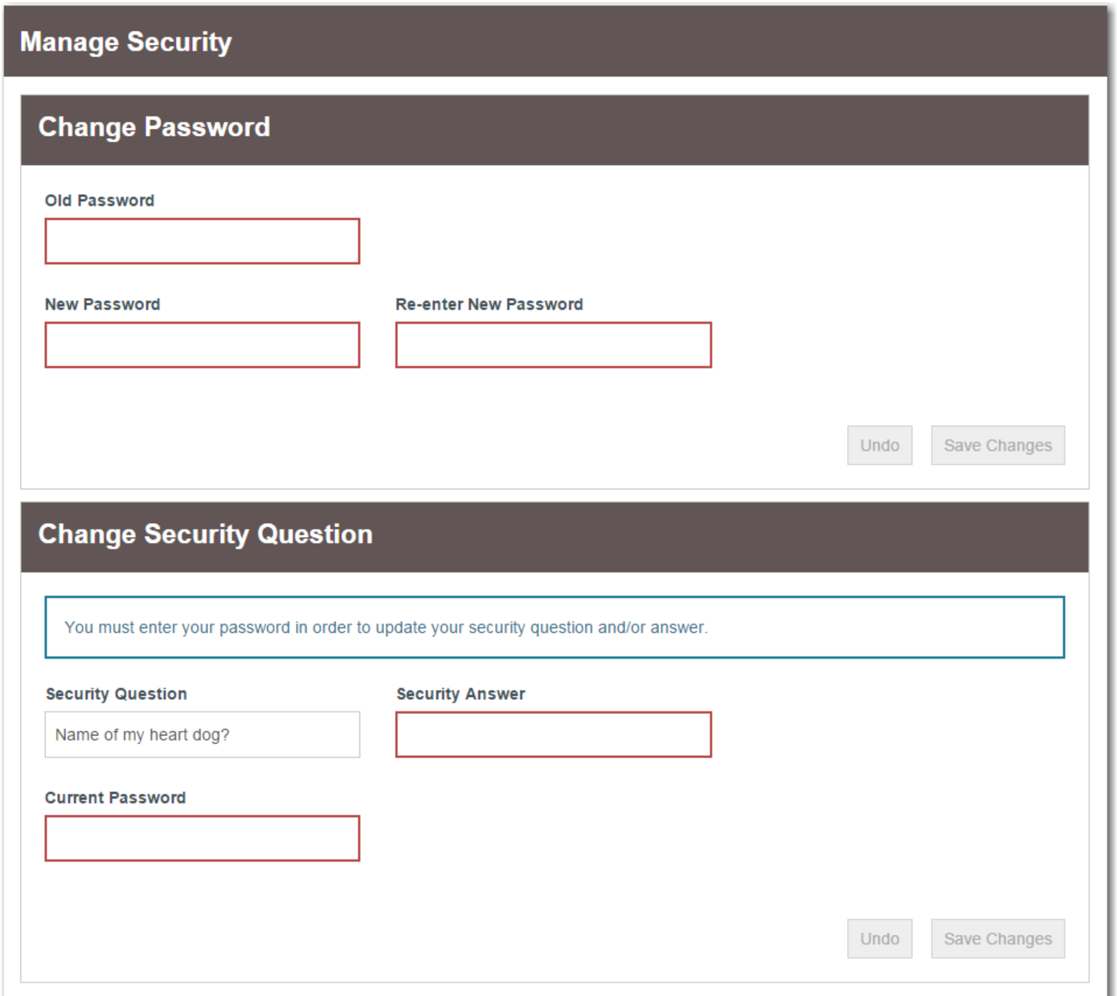


Figure 5.2 – Manage Security Page

2. Type your old password, followed by your new password. Then, retype your new password.

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

3. Click Save Changes to change your password, or click Undo to exit without changing your password.

Changing the Security Question

Change your security question from the *Manage Security* page.

Perform the following steps to change your security question:

1. From the profile drop-down list, select **Manage Security**.

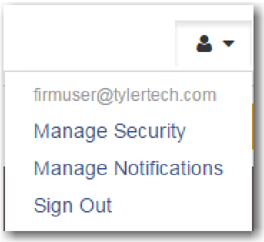


Figure 5.3 – Profile Drop-Down List

The *Manage Security* page opens.

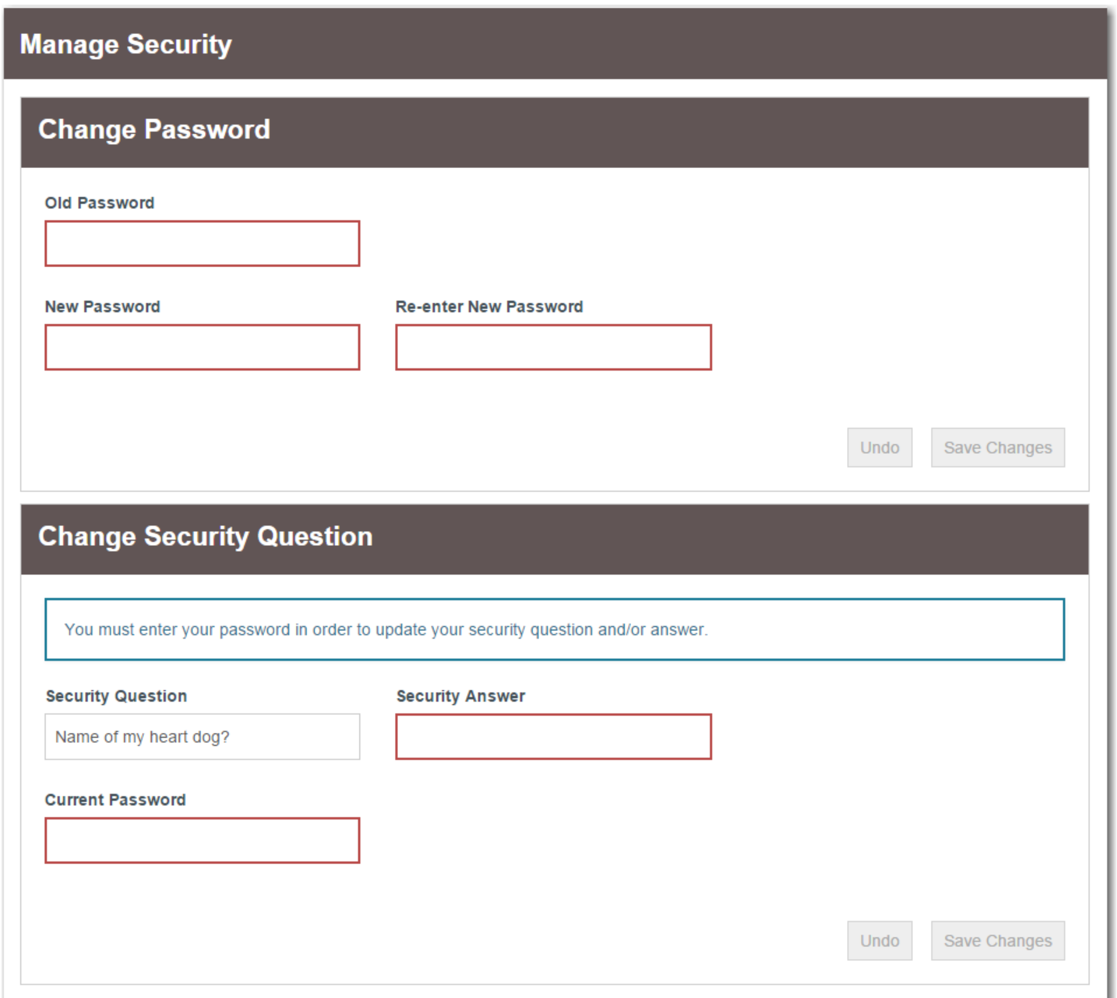


Figure 5.4 – Manage Security Page

2. Change your security question and answer by typing your new information in the **Security Question** and **Security Answer** fields. Then, type your current password in the **Current Password** field.
3. Click Save Changes to change your security information, or click Undo to exit without changing your security information.

Managing Notifications

You can set your notification preferences for receiving filing information.

Perform the following steps to set your email notifications:

1. From the profile drop-down list, select **Manage Notifications**.

   The *Manage Notifications* page opens.

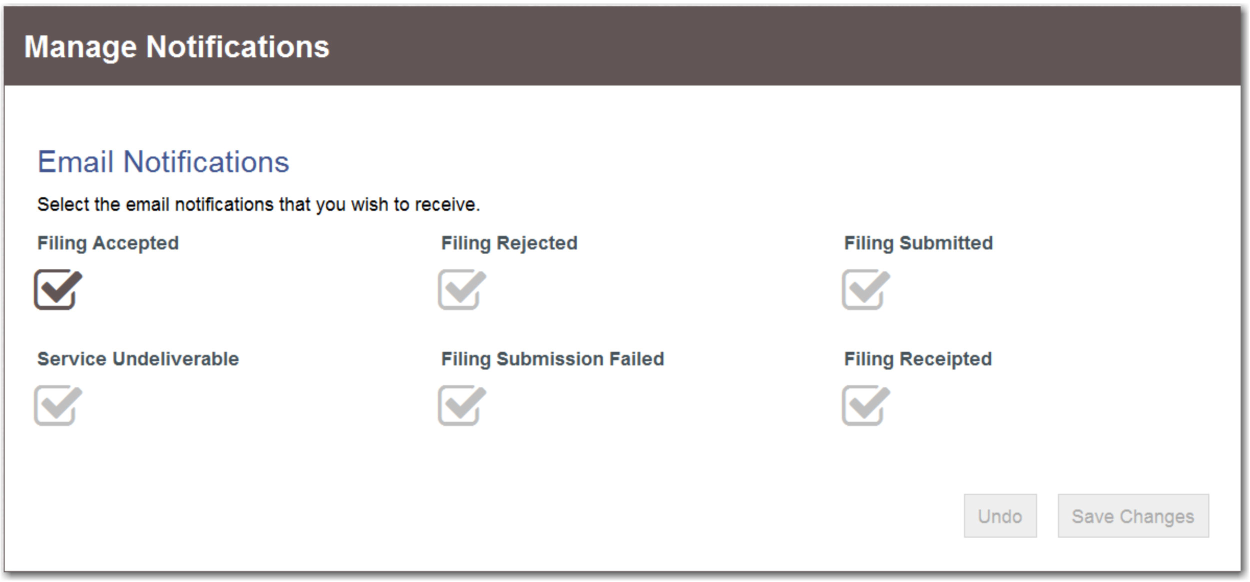
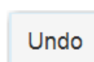


Figure 5.5 – Manage Notifications Page

2. Select the check boxes that correspond to the methods by which you want to be notified of filing information. The options that you can select include **Filing Accepted**, **Filing Rejected**, **Filing Submitted**, **Service Undeliverable**, **Filing Submission Failed**, and **Filing Receipted**.

3. Click 

to save your notification selection, or click 

to exit without changing your notification information.

Chapter 6 Filer Dashboard

Topics Covered in This Chapter

♦ Dashboard Filing Category Descriptions

The *Filer Dashboard* page is the starting page for all filings. From here, you can start a new case, file into an existing case, and check the status of all filings that have been made.

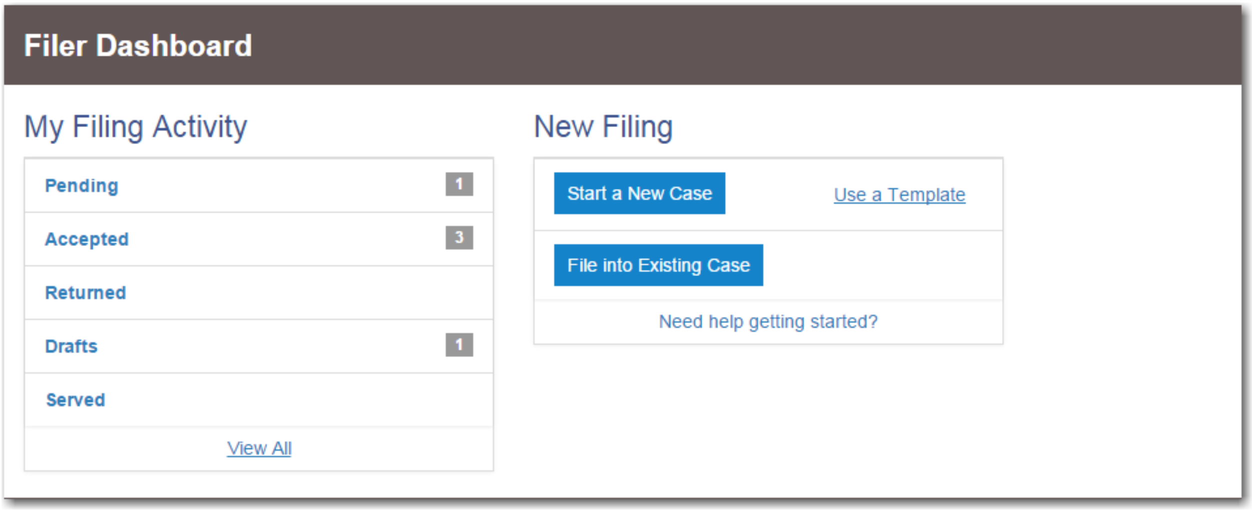


Figure 6.1 – Filer Dashboard Page

Dashboard Filing Category Descriptions

The status of all filings can be found in the **My Filing Activity** pane on the *Filer Dashboard* page.

The following table lists the status categories and their descriptions.

Filing Category	Description
Pending	Click to view envelopes that have been submitted and are being processed. Envelopes with a **Pending** status remain pending until there is some action from the court.
Accepted	Click to view envelopes that have been accepted by the court and are filed.
Returned	Click to view envelopes that have been returned from the court to be corrected.
Drafts	Click to view envelopes that have not been submitted yet.
Served	Click to view envelopes that have service-only filings that have been delivered. Envelopes with a **Served** status have been delivered to the party.

Chapter 7 Payment Accounts

Topics Covered in This Chapter

Unavailable Payment Accounts

During a filing, if any payment account is unavailable, the system notifies you that you are trying to use an invalid account.

A blue link is displayed after the **Filing Attorney** field. The link contains the following phrase: `Why don't I see all of my accounts?`

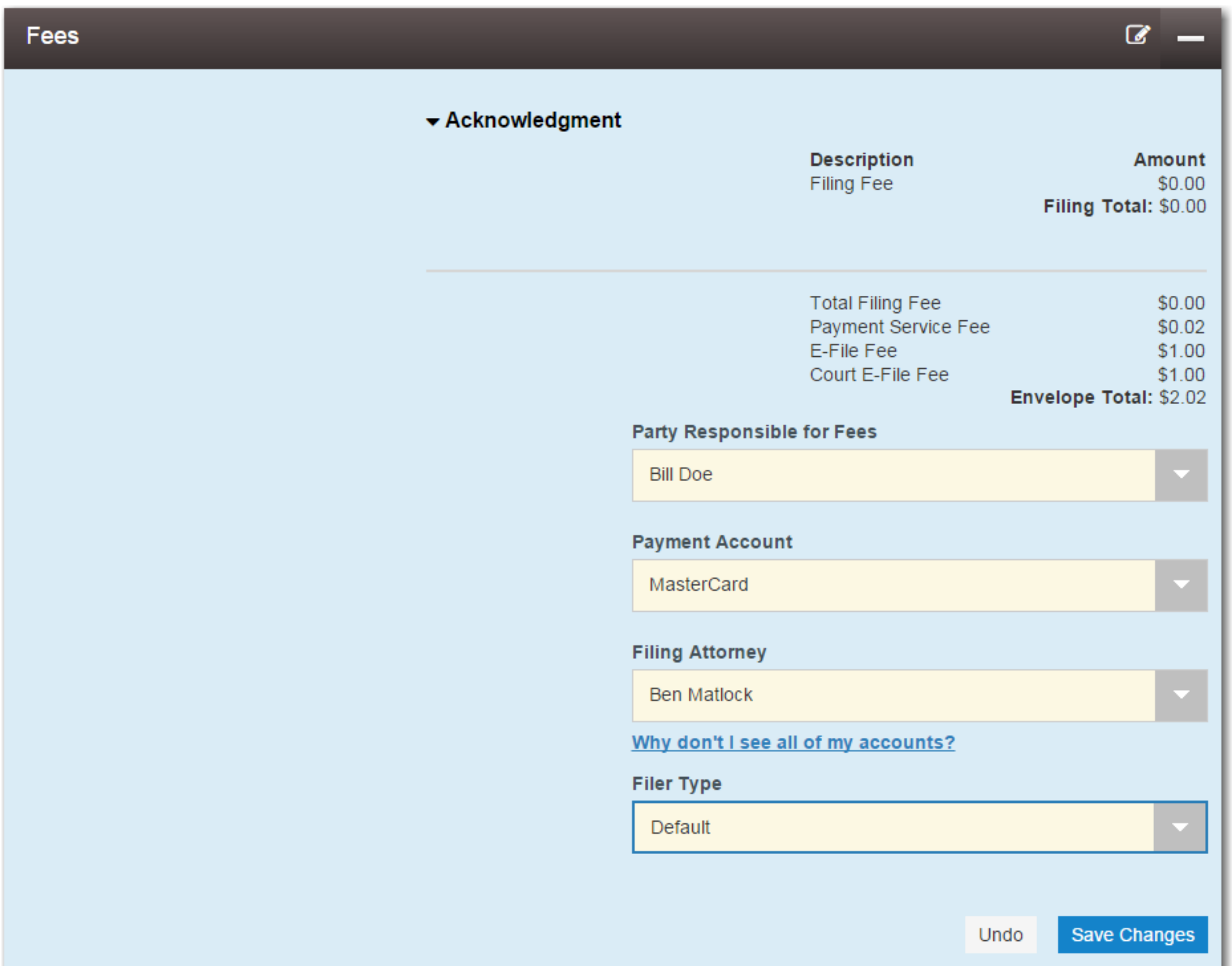


Figure 7.1 – Error Message Regarding Payment Accounts

When you click the link, a window opens that displays both the unavailable payment account and the reason that the payment account is unavailable.

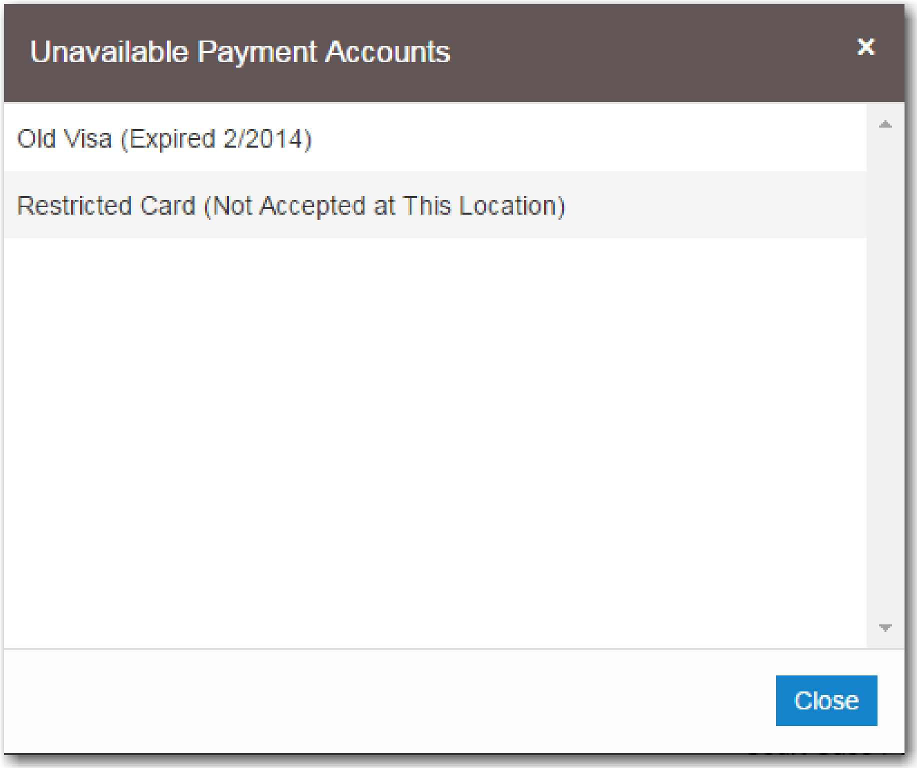


Figure 7.2 – Unavailable Payment Accounts Window

You cannot continue with your filing until you enter the correct information.

Draw Down Account User Interface

The locations of existing draw down accounts can be edited.

Note: Draw down accounts are configured by Tyler and may not be available on your system.

A tree view of the draw down accounts shows the parent-child relationship of the courts, which means that you can easily see and select the courts that you want to file into.

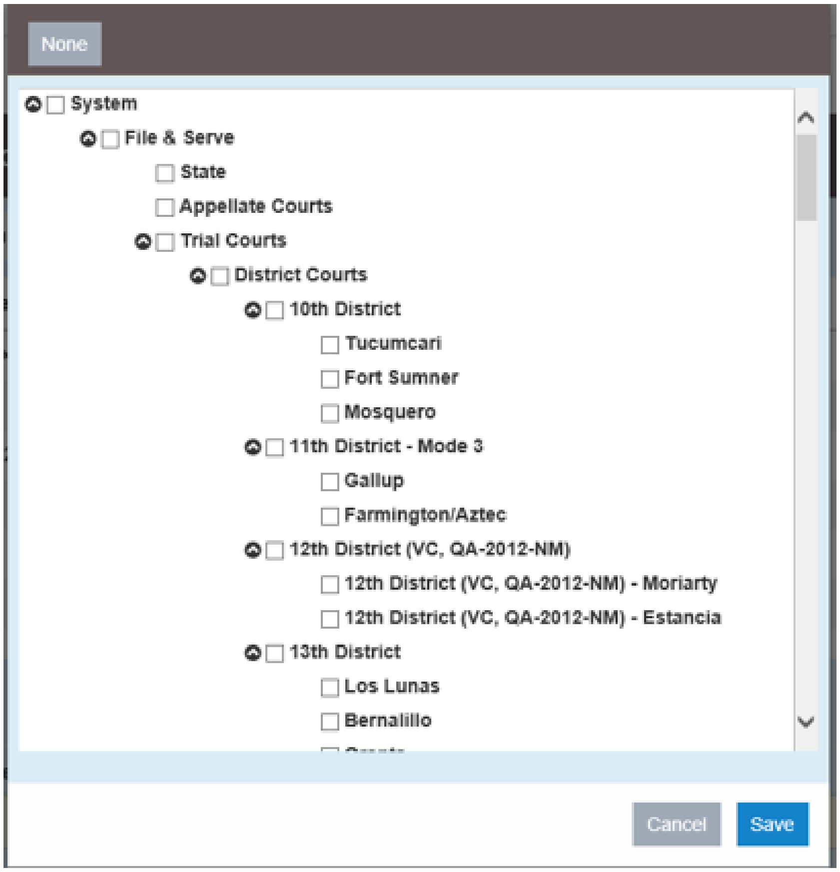


Figure 7.3 – Draw Down Account with Parent-Child Relationship of Courts

CHAPTER 8 TEMPLATES

TOPICS COVERED IN THIS CHAPTER

CREATING A TEMPLATE

Envelope templates allow you to quickly file into a case or create a new case from a template that you have created, which saves you time.

To create a new template, perform the following steps:

1. From the **Actions** drop-down list, select **Templates**.

   The *Templates* page opens.

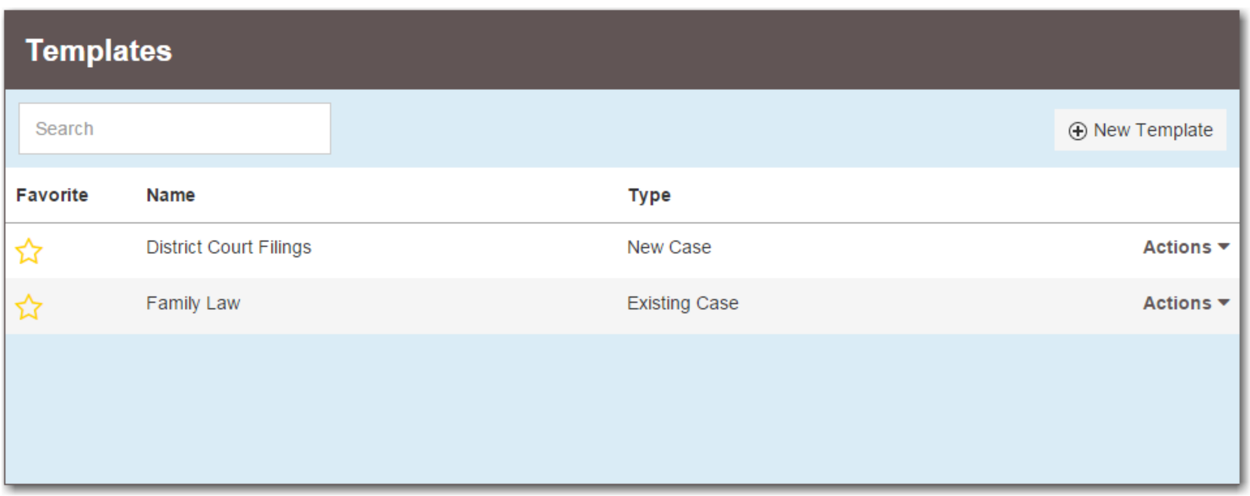
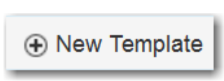


Figure 8.1 – Templates Page

2. Click 

.

   The *New Template* page opens.

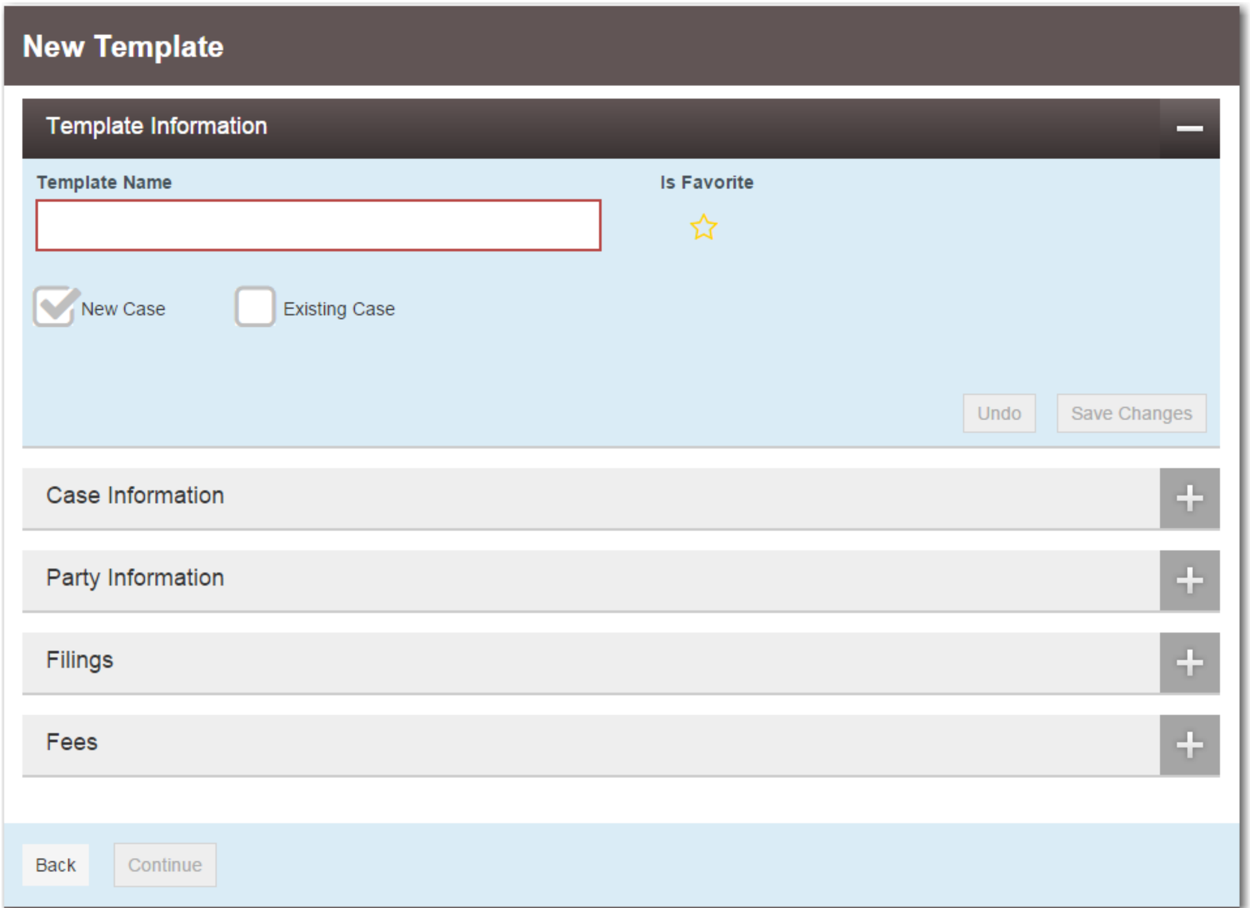


Figure 8.2 – New Template Page

3. Type a name for the template in the **Template Name** field. Indicate if this is a new case template or an existing case template by selecting either the **New Case** or **Existing Case** check box.

   Note: The field name is shown with a red outline around it, indicating that it is a required field.

4. Click Save Changes to save your changes, or click Undo to cancel the action.

   Note: Only the template name is required. You can enter as little or as much information on a template as you want.

5. Complete the fields in the **Case Information** section:

   a. Select the location from the drop-down list in the **Location** field.

   b. Select the category from the drop-down list in the **Category** field.

   c. Select the case type from the drop-down list in the **Case Type** field.

      Note: The fee associated with the case type is displayed.

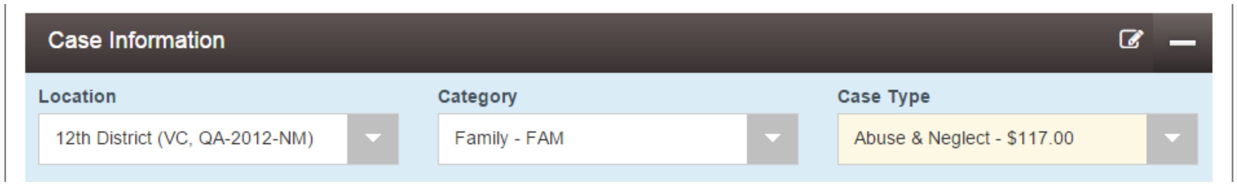


Figure 8.3 – Case Type Field with Fees Displayed

Note: The options for the category and case type are determined by the location that you select.

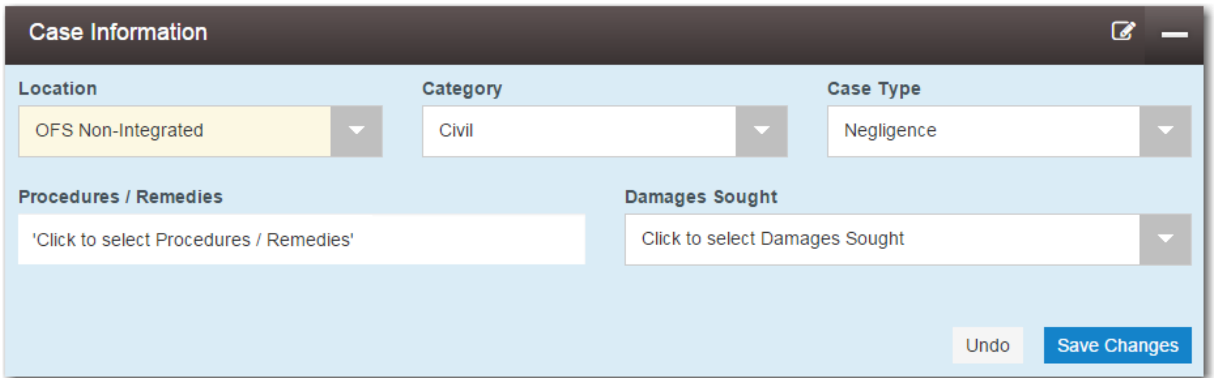


Figure 8.4 – Case Information Section

Note: If you select Civil in the Category field, you must also complete the Procedures / Remedies and Damages Sought fields.

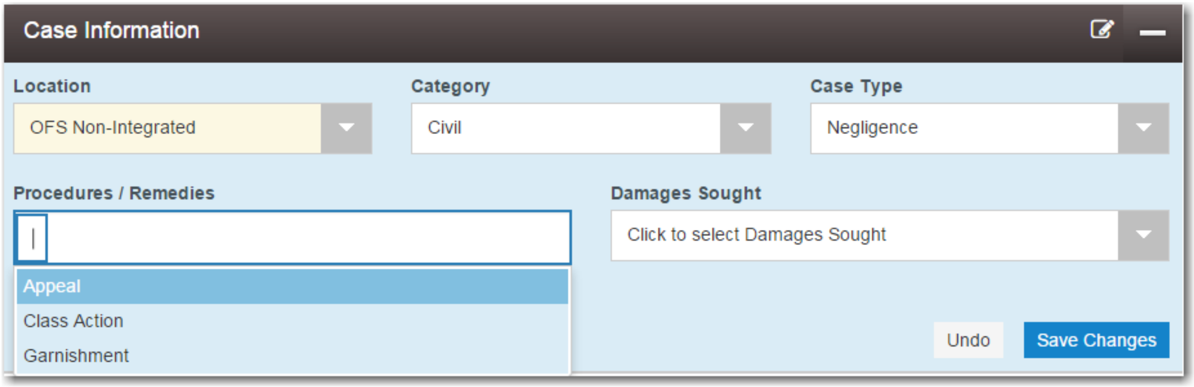


Figure 8.5 – Procedures / Remedies Drop-Down List

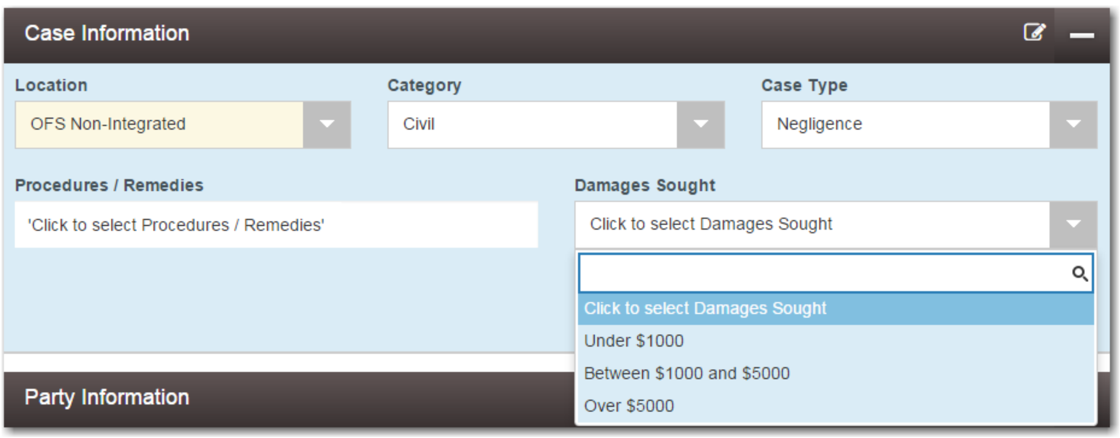


Figure 8.6 – Damages Sought Drop-Down List

6. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.
7. Complete the fields in the **Party Information** section, including the petitioner and respondent.

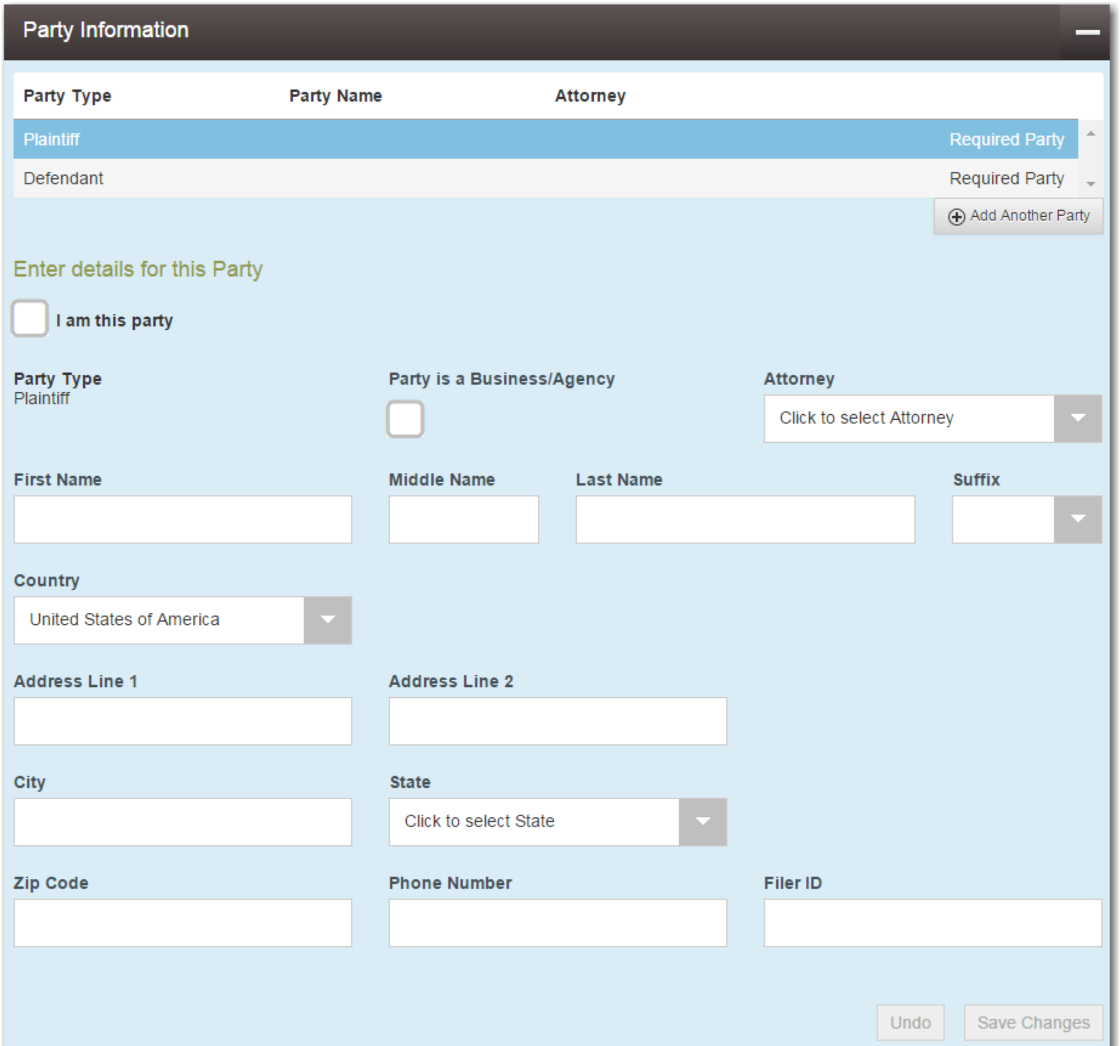


Figure 8.7 – Party Information Section

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

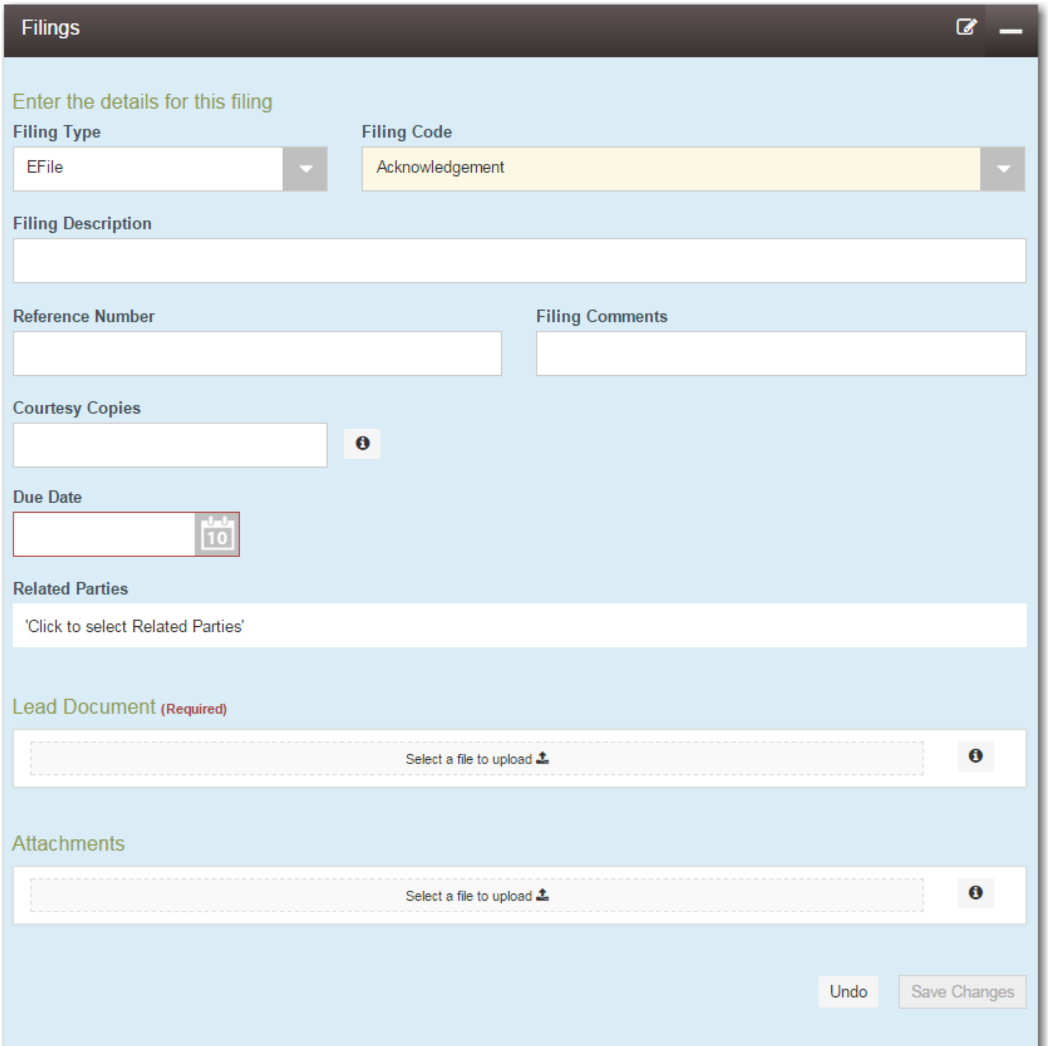


Figure 8.8 – Filings Section

a. Select a filing type from the drop-down list in the **Filing Type** field.
b. Select a filing code from the drop-down list in the **Filing Code** field.

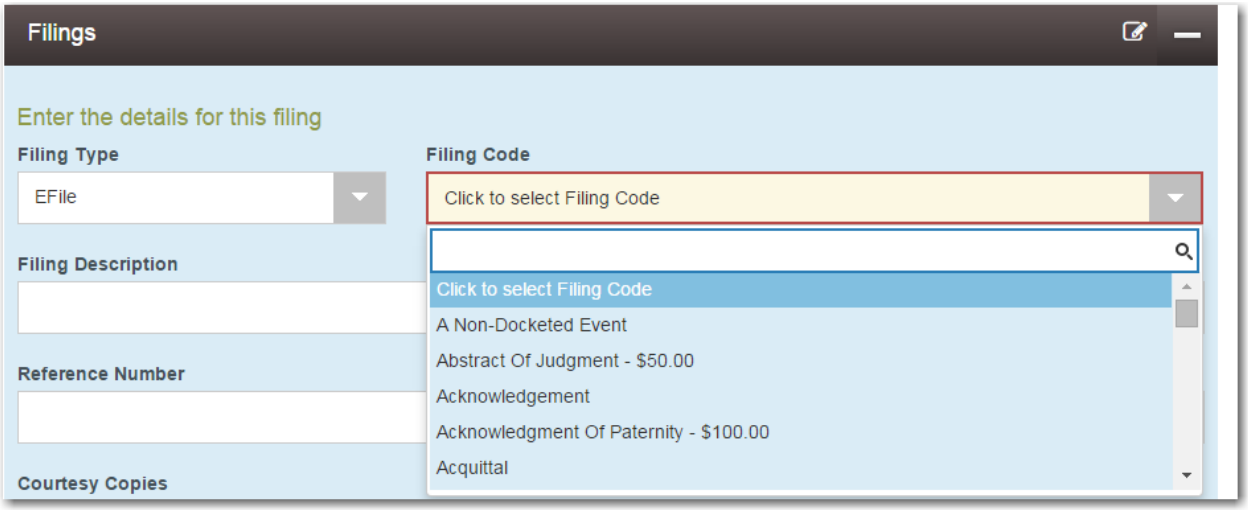


Figure 8.9 – Filing Code Field with Drop-Down List Displayed

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

Figure 8.10 – Filing Code Field with Fee Displayed

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

d. Type a reference number in the **Reference Number** field.

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

e. Type any relevant comments in the **Filing Comments** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

Note: The Due Date field is configured by Tyler and may not be available on your system.

A calendar is displayed from which you can select the specified date.

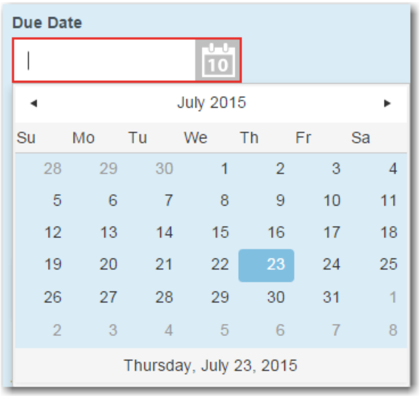


Figure 8.11 – Due Date Calendar

h. If you want to associate the parties with the template, click the **Related Parties** field to select the parties from the drop-down list that is displayed.

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

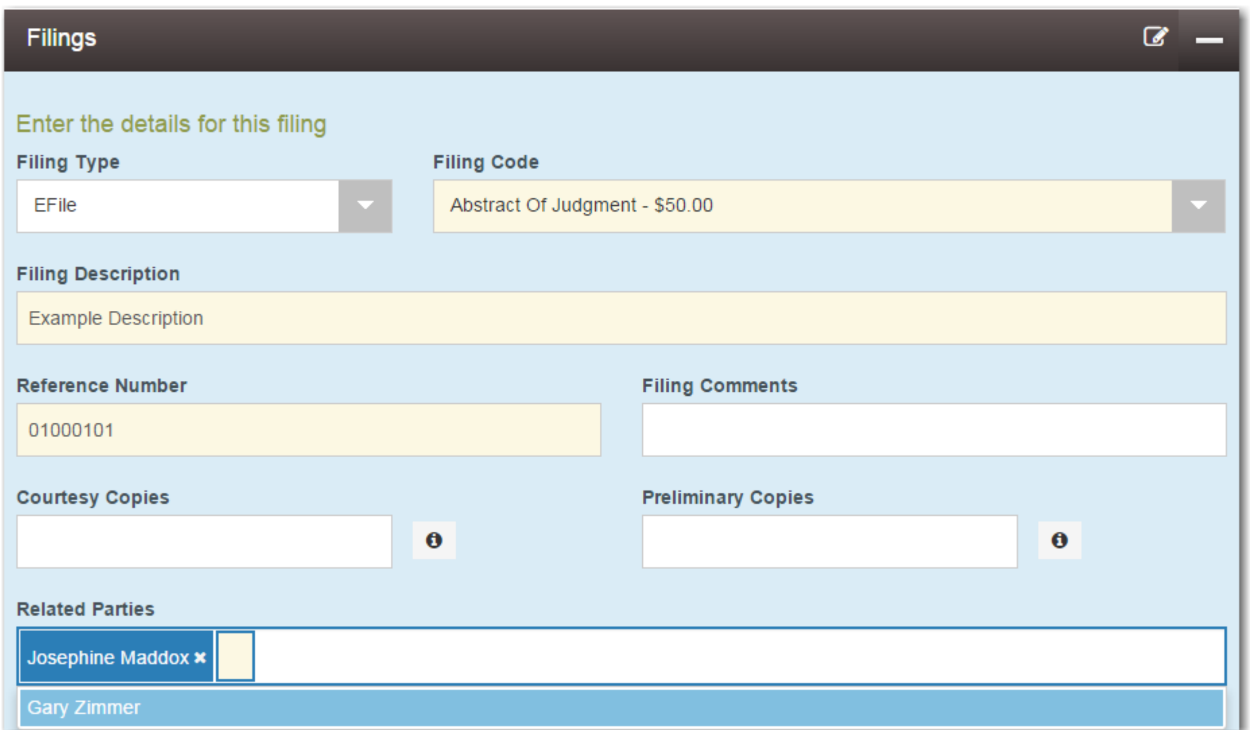


Figure 8.12 – Related Parties in the Filings Section

i. Click the **Lead Document** field to select a lead document to load.

Note: This field is required. Only one document can be uploaded as a lead document.

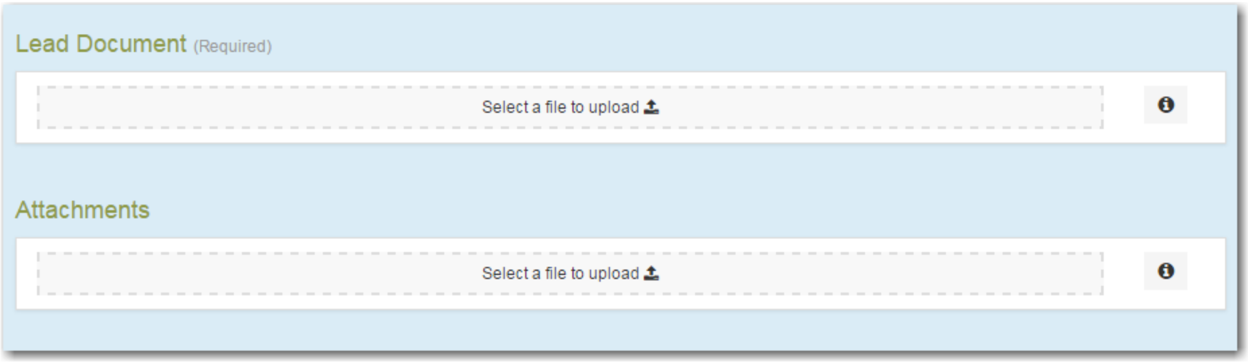


Figure 8.13 – Lead Document and Attachments Fields in the Filings Section

j. Type a name for the lead document in the **Description** field.

k. Click the drop-down list in the **Security** field to select the level of security to attach to the document.

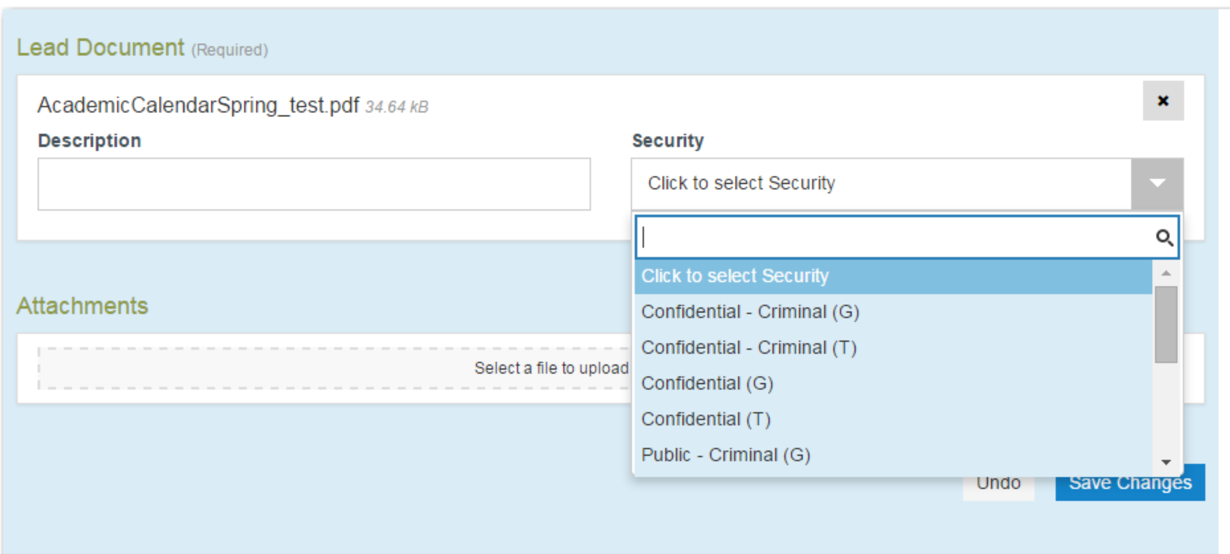


Figure 8.14 – Security Field Drop-Down List in the Lead Document Section

l. If you have attachments to load, click the **Attachments** field to select the documents to load.

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

m. Click Save Changes to save your changes, or click Undo to cancel the action.

If you save your changes, a new section called **Optional Services** is displayed.

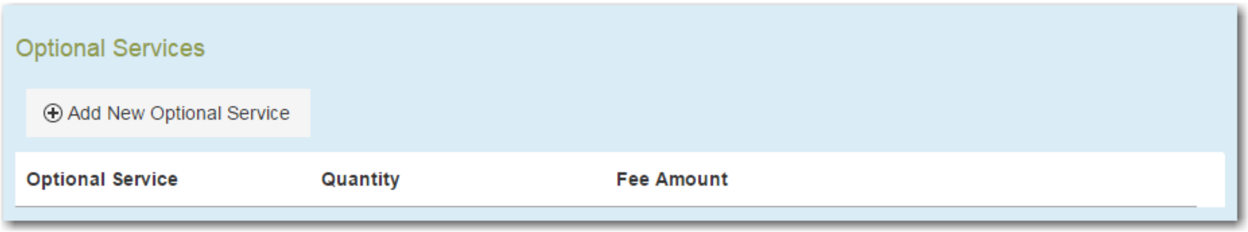
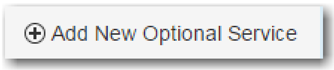


Figure 8.15 – Optional Services Section

n. Click  to add an optional service to the lead document.

The **Optional Service** field is displayed.

o. Select a service from the drop-down list in the **Optional Service** field.

Note: The fee associated with the optional service is displayed.

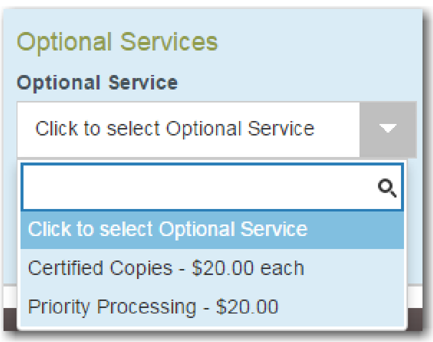
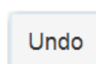


Figure 8.16 – Optional Service Drop-Down List

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

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

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

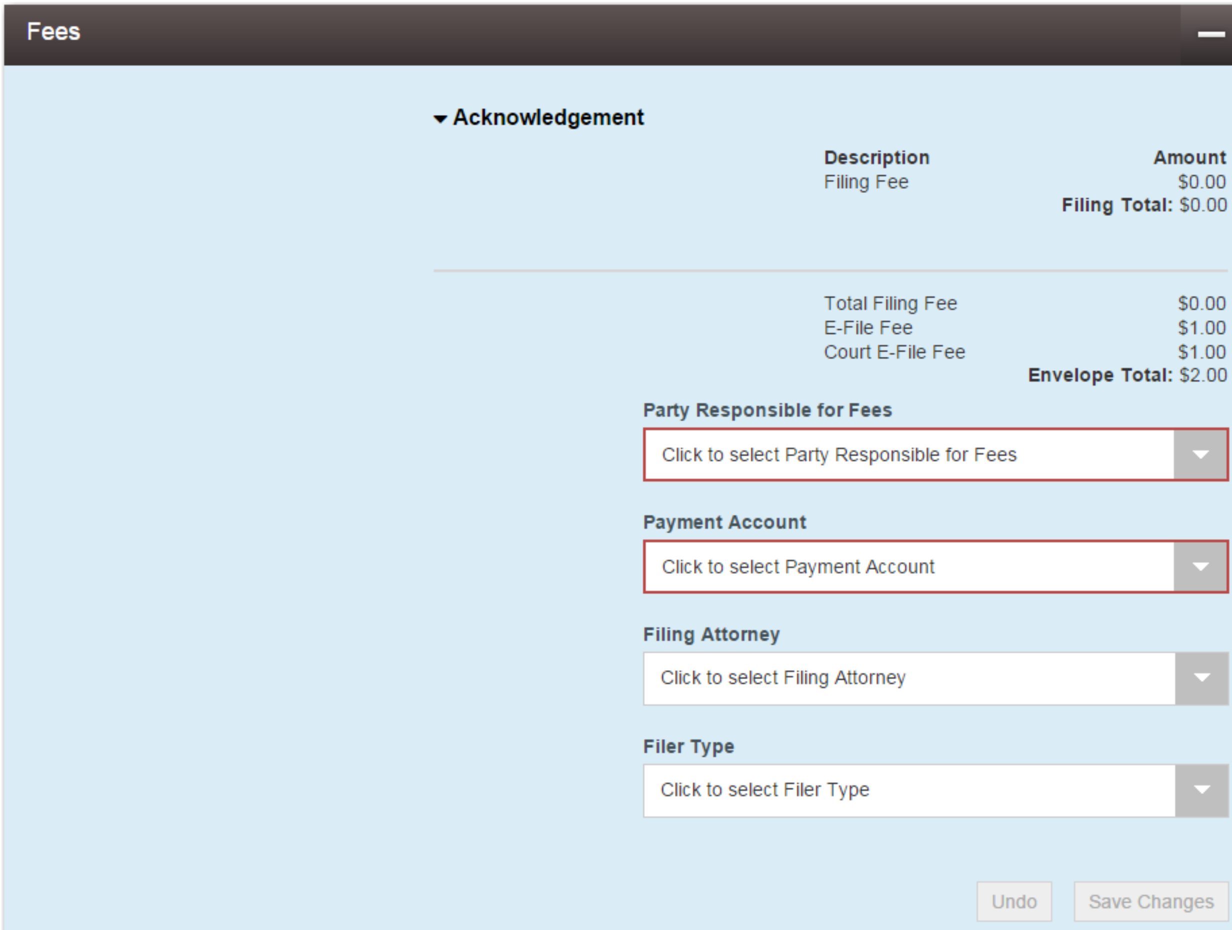


Figure 8.17 – Fees Section

a. Select the party that is responsible for paying the fees in the **Party Responsible for Fees** field.

b. Select the payment account from the drop-down list in the **Payment Account** field.

Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

c. Select the filing attorney from the drop-down list in the **Filing Attorney** field.

d. Select the filer type from the drop-down list in the **Filer Type** field.

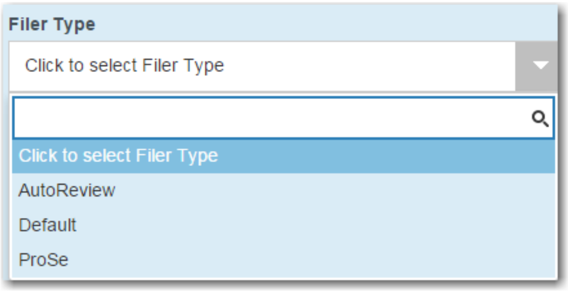


Figure 8.18 – Filer Type Drop-Down List

e. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.

10. Click **Continue** to continue creating the template, or click **Cancel** to cancel the template creation.

Clicking **Continue** opens the *Confirm Template Details* page.

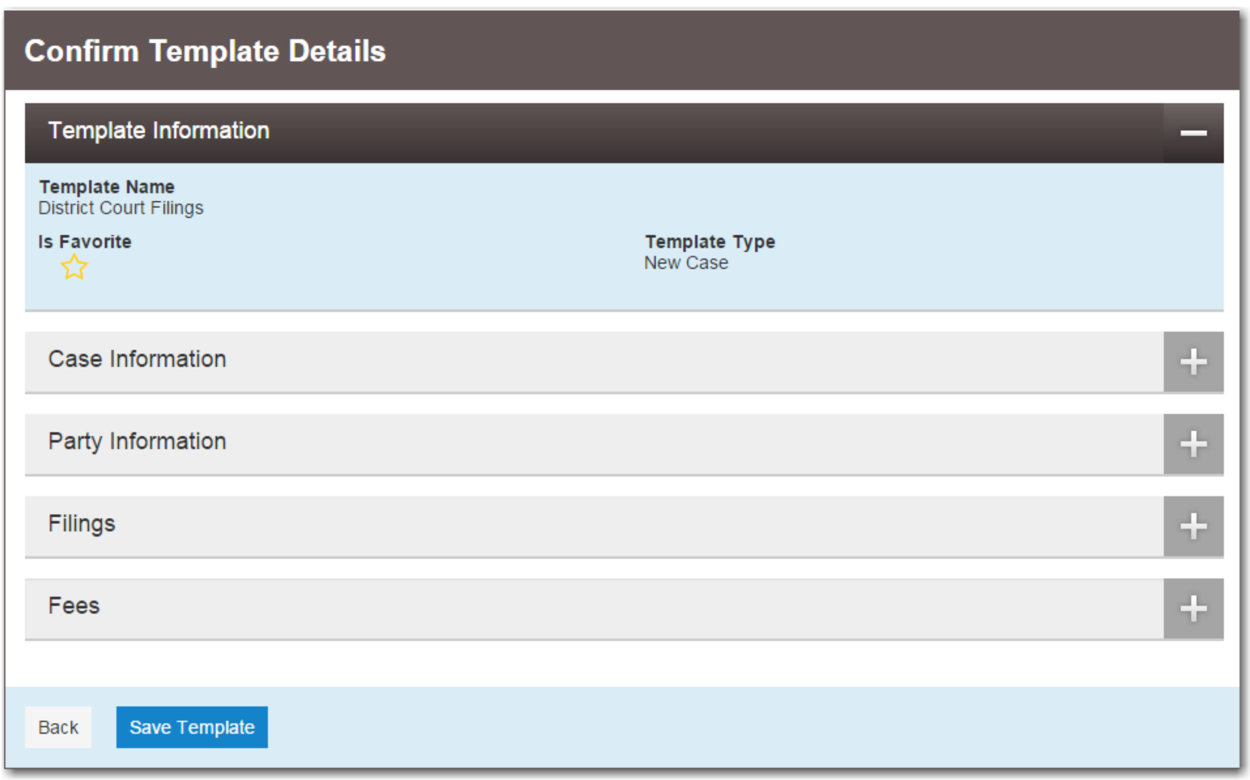


Figure 8.19 – Confirm Template Details Page

11. Review the template details and click **Save Template** to save the template, or click **Back** to go back to the previous page.

Note: To designate a template as a favorite, click in the Favorite column on the *Templates* page. The color of the star fills in, indicating this template is a favorite ( ). Favorite templates are displayed first on the *Templates* page.

Editing a Template

You can edit an existing template if you need to make changes to it.

To edit a template, perform the following steps:

1. From the **Actions** drop-down list, select **Templates**.

   The *Templates* page opens.

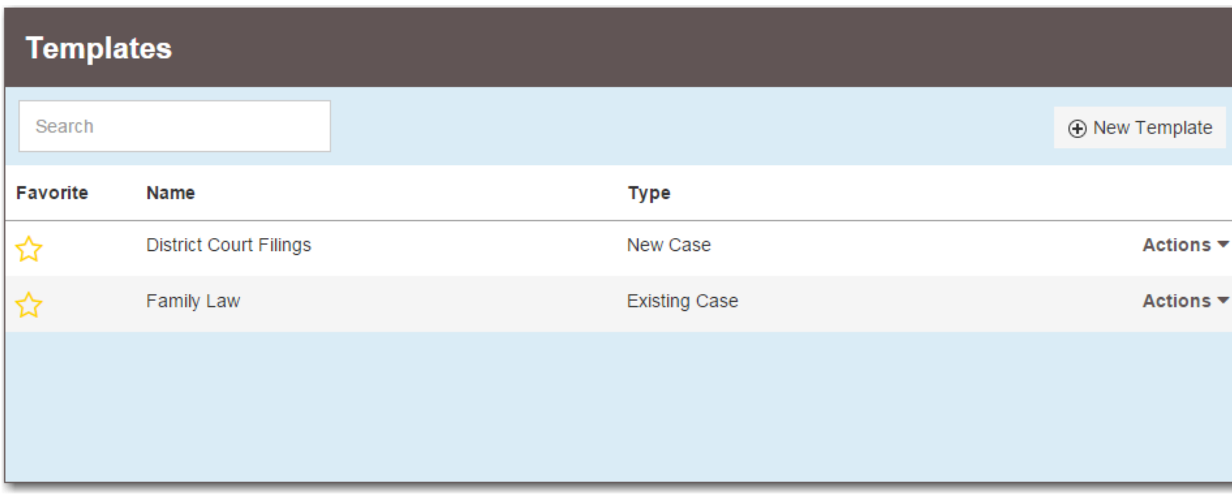


Figure 8.20 – Templates Page

2. Locate the template that you want to change. From the **Actions** drop-down list for the specified template, select **Edit Template**.

   The template is displayed.
3. Make any necessary changes.
4. When you are done modifying the template, click **Continue**.

   The *Confirm Template Details* page is displayed.
5. If you are satisfied with your changes to the template, click **Save Template**.

Using a New Case Template

After a template has been created, use it to accelerate your filing.

To use a template that you previously created, perform the following steps:

1. From the **Actions** drop-down list, select **Templates**.

The *Templates* page opens.

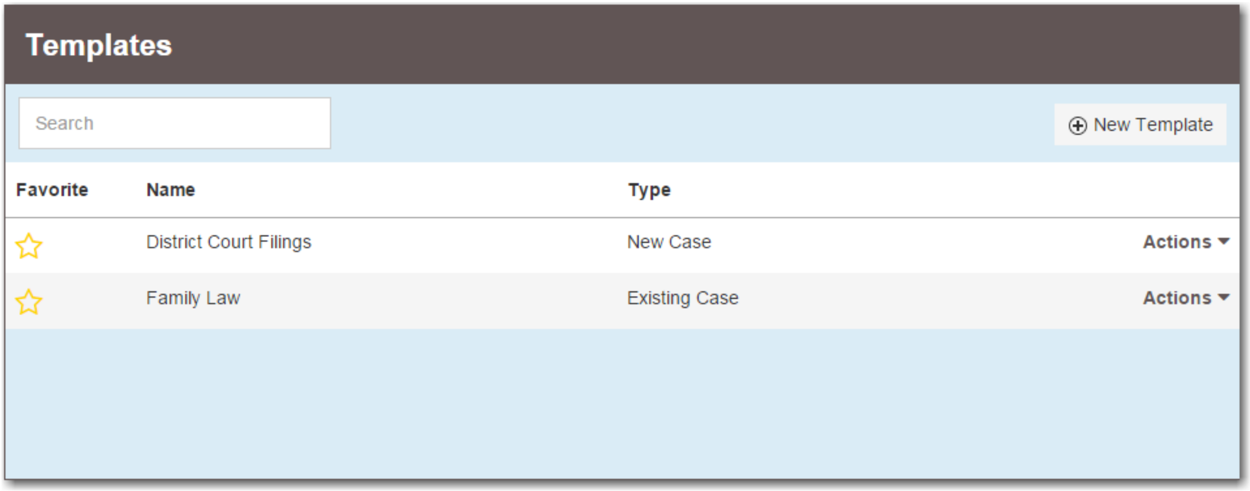


Figure 8.21 – Templates Page

2. Locate the template that you want to use for your case. From the **Actions** drop-down list for the specified template, select **Use Template**.

   The template is displayed. The portions of the template that you created previously are auto-filled.
3. As applicable, complete all remaining fields for the new case (i.e., **Party Information**, **Filings**, including uploading a lead document, and **Fees**).
4. When all fields have been completed, click Save as Draft or Continue.

   If you click Continue, the case is displayed for your review.
5. If you are satisfied with the case, click Submit.

Using an Existing Case Template

After a template has been created, use it to accelerate your filing when filing into an existing case.

Perform the following steps to access an existing case to begin a filing:

1. Select one of the following methods to begin your filing:
    - Click **File into Existing Case** from the *Filer Dashboard* page.

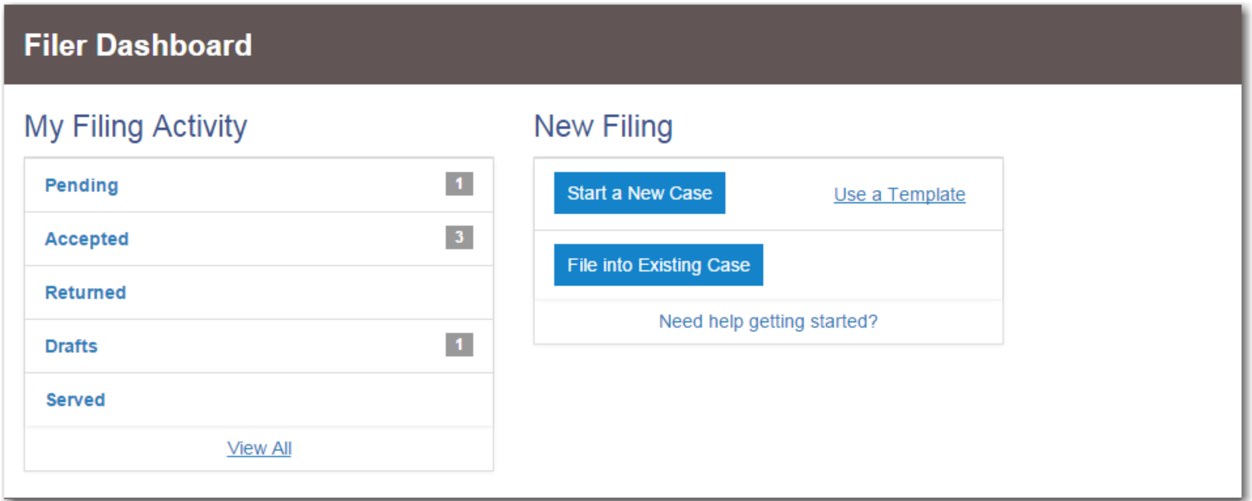


Figure 8.22 – Filer Dashboard Page

Note: The *File Into Existing Case* page opens. Click Search to locate the case that you want.

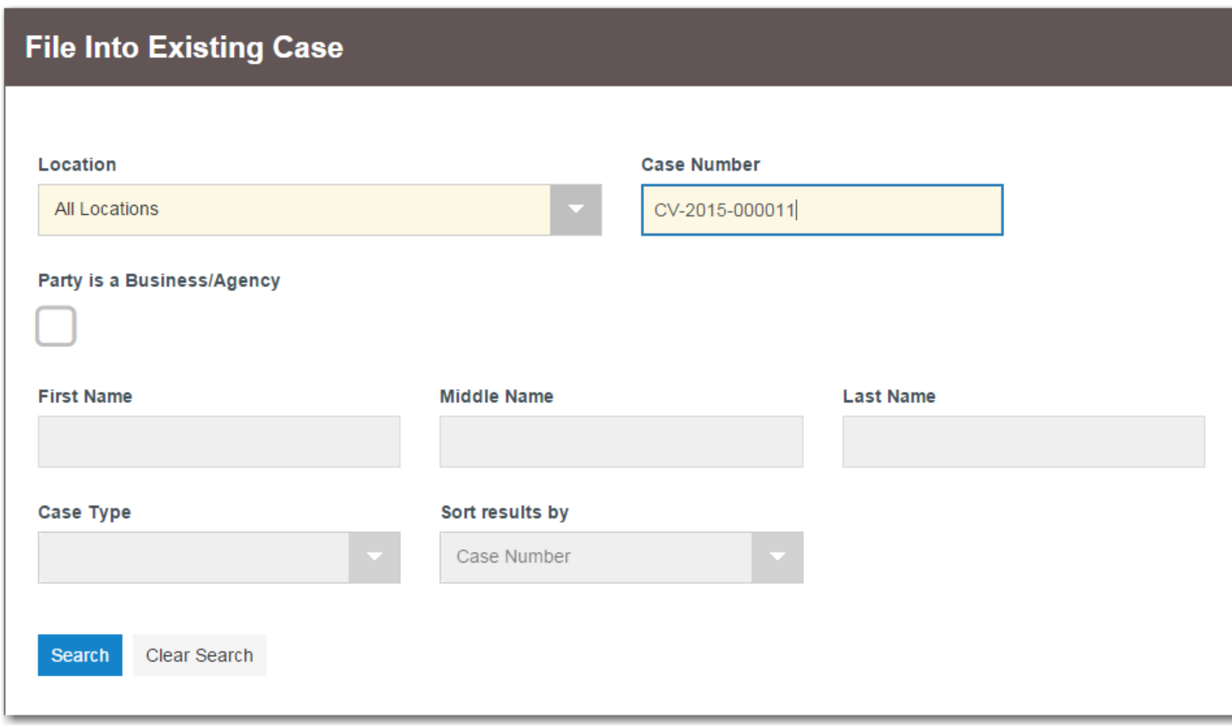


Figure 8.23 – File Into Existing Case Page

Note: When the correct case is displayed, select File Into Case With Template from the Actions drop-down list for the specified case.

Figure 8.24 – Case Actions Drop-Down List

- Select **File Into Existing Case** from the **Actions** drop-down list.

  Note: The *File Into Existing Case* page opens. Click Search to locate the case that you want. When the correct case is displayed, select File Into Case With Template from the Actions drop-down list for the specified case.

- From the *Filing History* page, locate the case that you want to file into. From the **Actions** drop-down list for the specified case, select **File Into Case With Template**.

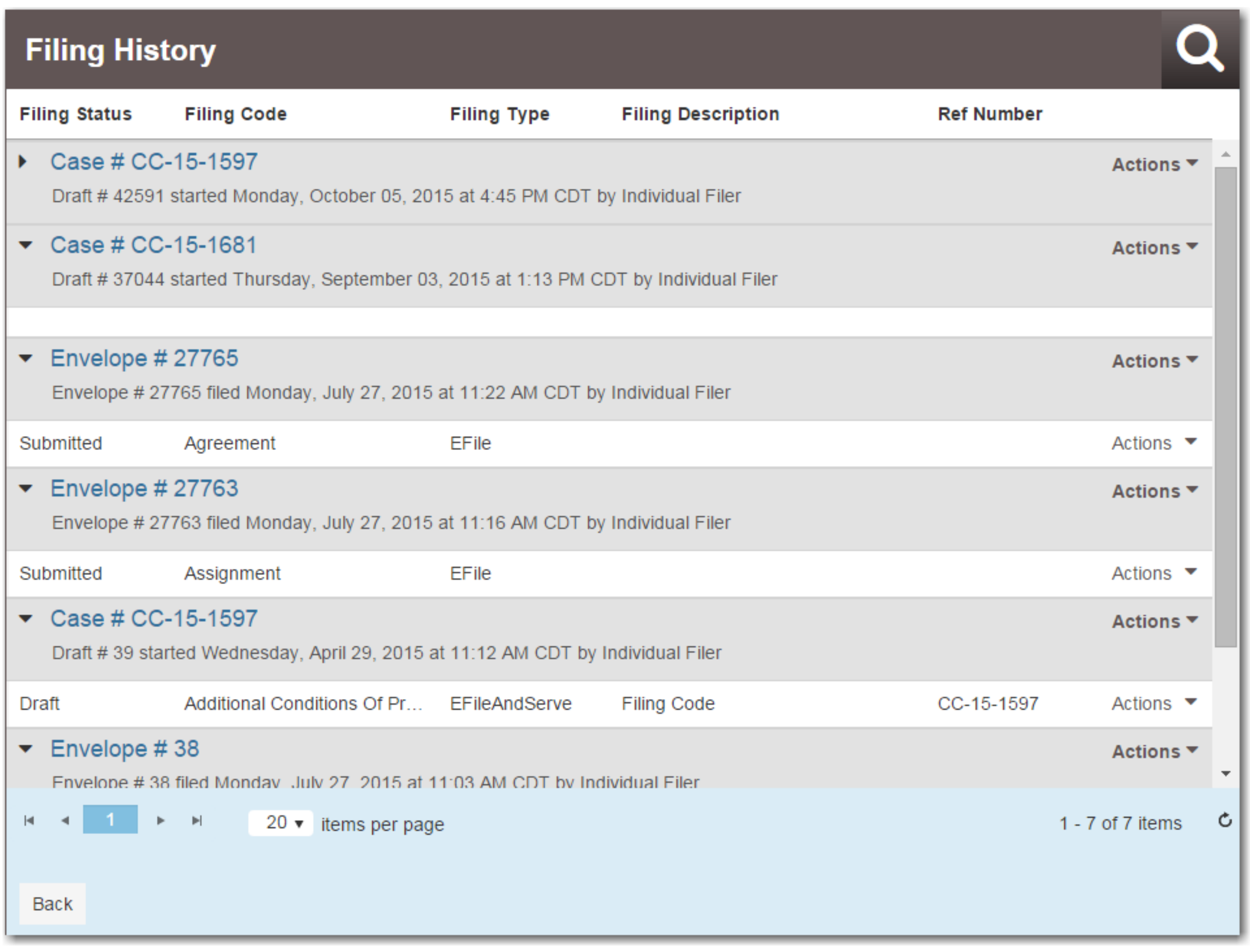


Figure 8.25 – Filing History Page

The *Existing Case Templates* page opens.

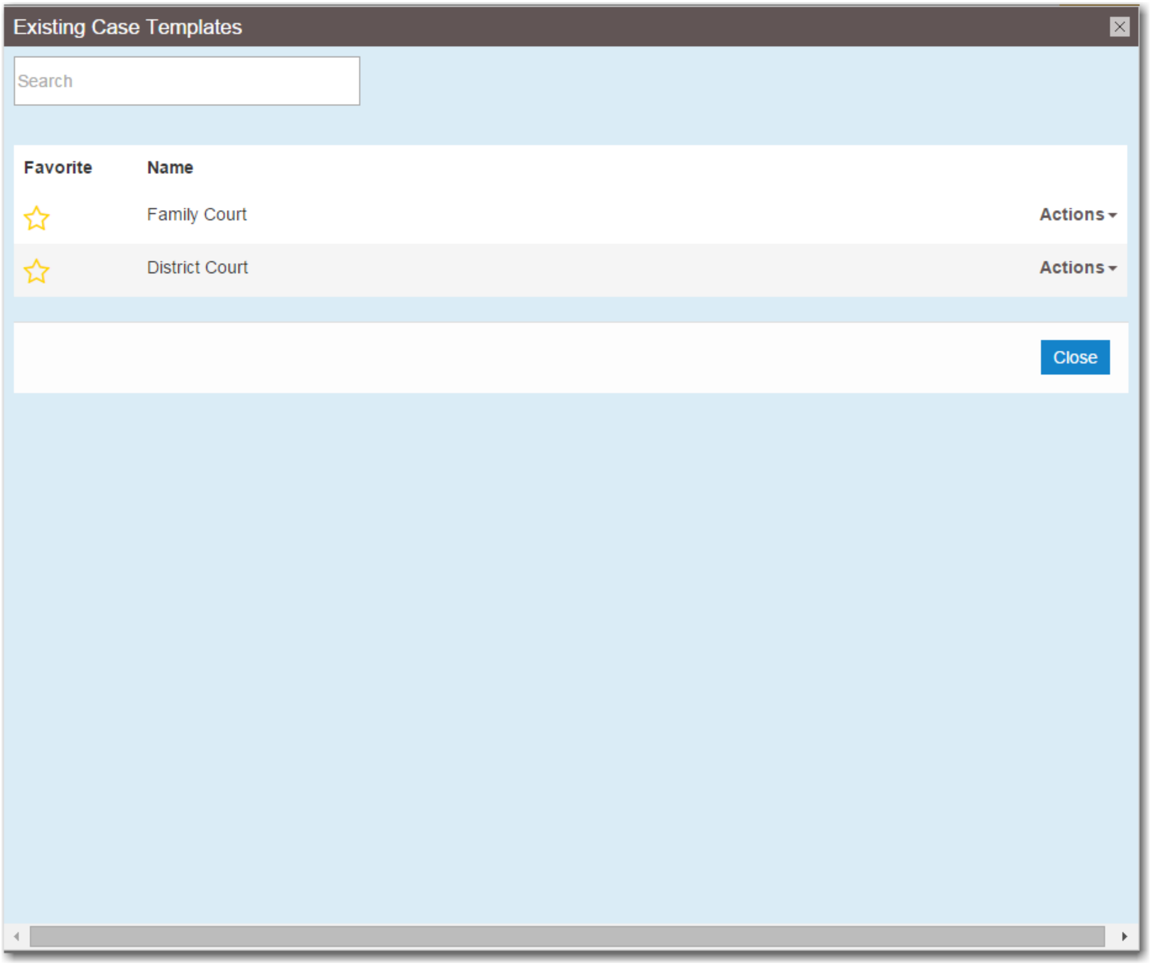


Figure 8.26 – Existing Case Templates Page

2. Locate the template that you want to use for the case you are filing into. From the **Actions** drop-down list for the specified template, select **Use Template**.

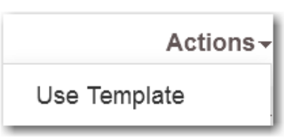


Figure 8.27 – Actions Drop-Down List for Existing Case Templates

The template that you selected is displayed. The **Case Information** and **Party Information** fields are already populated since this is an existing case. You can add additional parties.

3. Complete the filing details in the **Filings** section:

   a. Select the filing type from the drop-down list in the **Filing Type** field.

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

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

   d. If applicable, complete the information in the **Reference Number**, **Filing Comments**, and **Courtesy Copies** fields.

   e. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

Note: The Due Date field is configured by Tyler and may not be available on your system.

f. If you want to associate any parties to the case, click the **Related Parties** field to select the parties from the drop-down list that is displayed.

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

g. After completing the required fields, click **Save Changes**.

4. Complete the fields in the **Fees** section.
5. Click either **Save as Draft** or **Continue**. Clicking **Continue** displays a page that reflects your filing. Review the page, and then click **Submit**.

   A new **Envelope** of your filing is included on the *Filing History* page.

Note: If you save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue your filing.

Viewing Template Details

You can view a template that you previously created.

To view the details of an existing template, perform the following steps:

1. From the **Actions** drop-down list, select **Templates**.

   The *Templates* page opens.

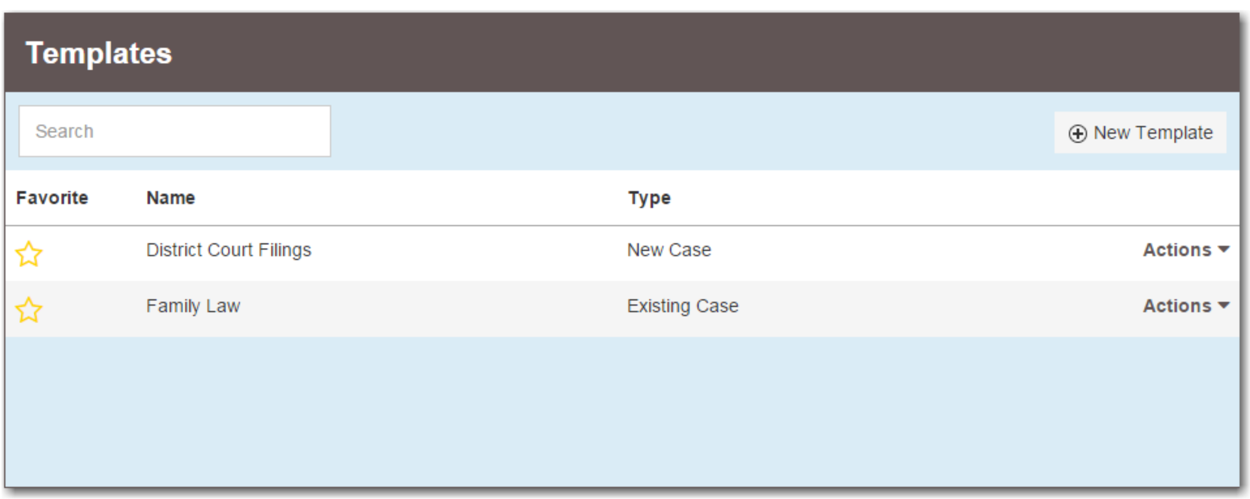


Figure 8.28 – Templates Page

2. Locate the template that you want to view. From the **Actions** drop-down list for the specified template, select **View Template Details**.

   The last version of the template that you saved is displayed.

DELETING A TEMPLATE

You can delete a template that you no longer need.

To delete an existing template, perform the following steps:

1. From the **Actions** drop-down list, select **Templates**.

   The *Templates* page opens.

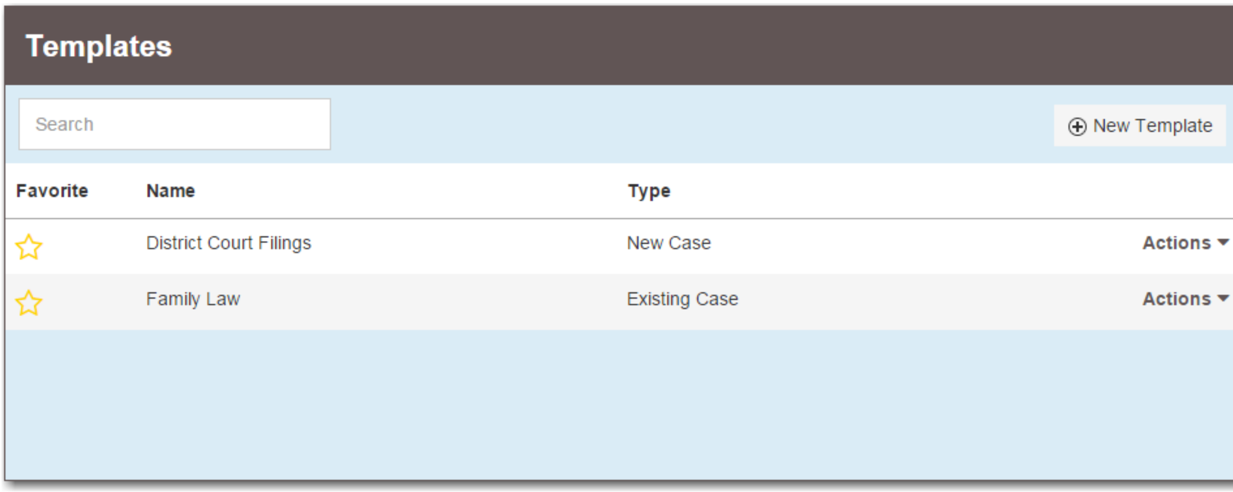


Figure 8.29 – Templates Page

2. Locate the template that you want to delete. From the **Actions** drop-down list for the specified template, select **Delete Template**.

   The template is immediately deleted.

Chapter 9 Case Initiation

Topics Covered in This Chapter

You can initiate a case from the **Actions** drop-down list or from the *Filer Dashboard* page under the **New Filing** header.

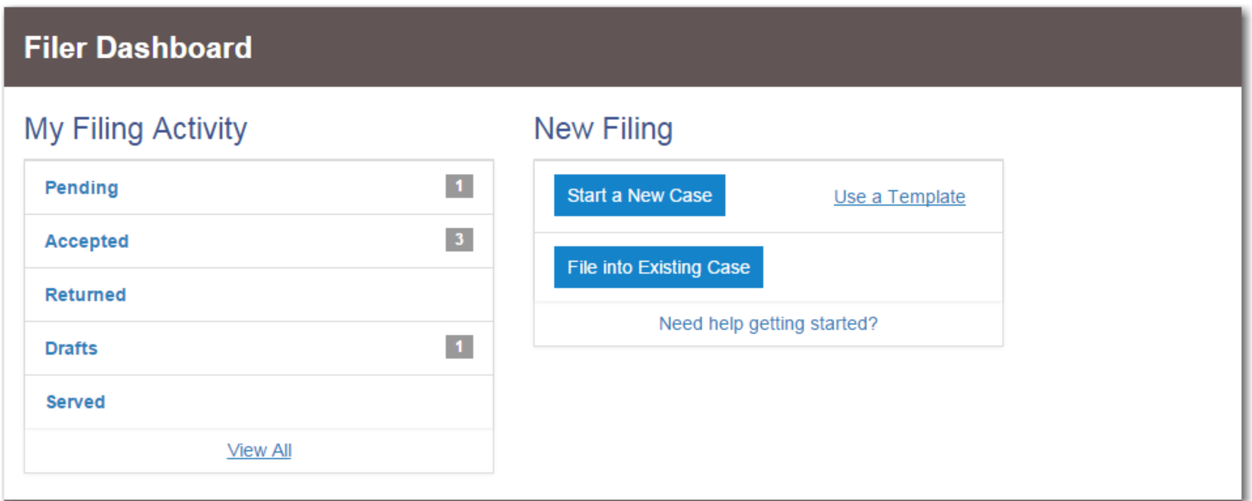


Figure 9.1 – Filer Dashboard Page

Filing a New Case

You can file a new case in a couple of ways.

Perform the following steps to file a new case:

1. Select **Start a New Case** from the **Actions** drop-down list, or click **Start a New Case** from the **Filer Dashboard** under the **New Filing** header.

   The *Add Filing* page opens.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section:

   Note: A red box around the field indicates that it is required.

   a. Select your location (i.e., the court where you will be doing the filing).

   b. Select your category. (This field is determined by the location you selected.)

   c. Select your case type. (This field is determined by the category you selected.)

      Note: The fee associated with the case type is displayed.

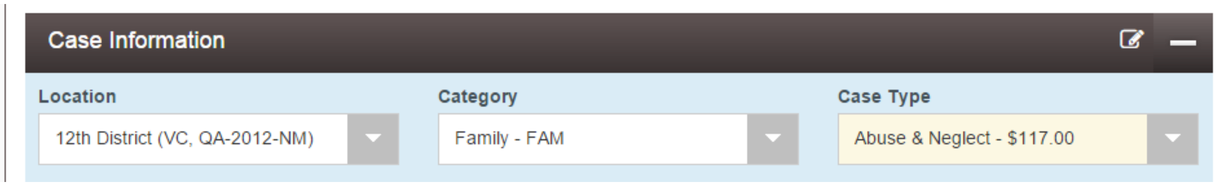


Figure 9.2 – Case Type Field with Fees Displayed

d. Select your filing attorney. Only the attorneys you have already entered into the system are available for selection.

Note: If you are an individual filer, Pro Se is the only option for the Attorney field.

3. After completing the required fields, click 

.

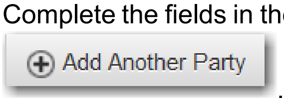
Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

Entering Party Details

Each case requires a party type.

Note: Required fields are shown with a red outline around the field. You must complete all required information for the party types in the fields provided.

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

1. Complete the fields in the **Party Information** section. If you want to add another party to the filing, click 

, and then enter the party information in the required fields:

   a. Enter the party type (for example, **Defendant/Plaintiff**). Indicate whether the party is a business by selecting **Party is a Business**.

   b. Select an attorney from the drop-down list.

   c. Complete the **First Name**, **Middle Name** (if applicable), and **Last Name** fields.

   d. Select the country from the drop-down list.

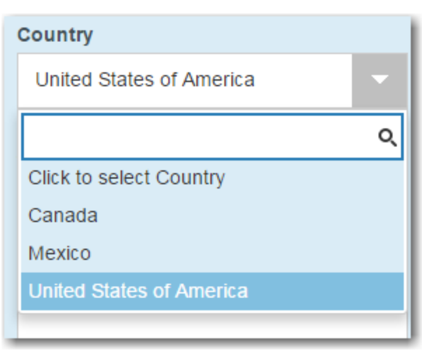


Figure 9.3 – Country Drop-Down List

   e. For a party in the United States, complete the **Address**, **City**, **State**, **Zip Code**, **Phone Number**, and **Filer ID** fields.

For a party in Mexico, complete the **Address**, **City**, **State**, **Postal Code**, **Phone Number**, and **Filer ID** fields.

For a party in Canada, complete the **Address**, **City**, **Province**, **Postal Code**, **Phone Number**, and **Filer ID** fields.

Note: Select the province from the Province drop-down list.

2. After completing the required fields, click Save Changes .
3. Complete the same party information for the other party.
4. After completing the required fields, click Save Changes .

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

Entering Filing Details

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

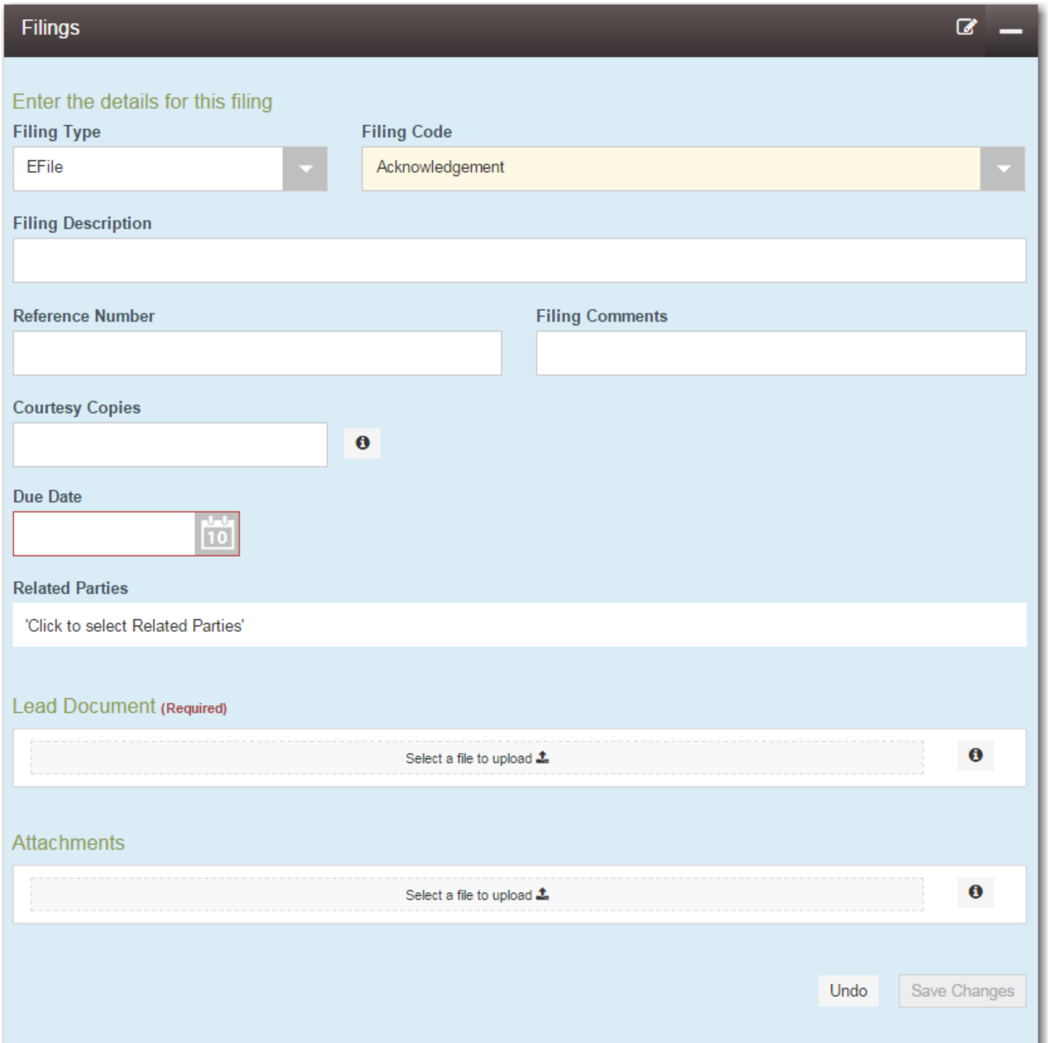


Figure 9.4 – Filings Section

To enter the filing details, perform the following steps:

1. Enter the filing details for the case in the **Filings** section:
   a. Select a filing type from the **Filing Type** drop-down list.
   b. Select a filing code from the **Filing Code** drop-down list.

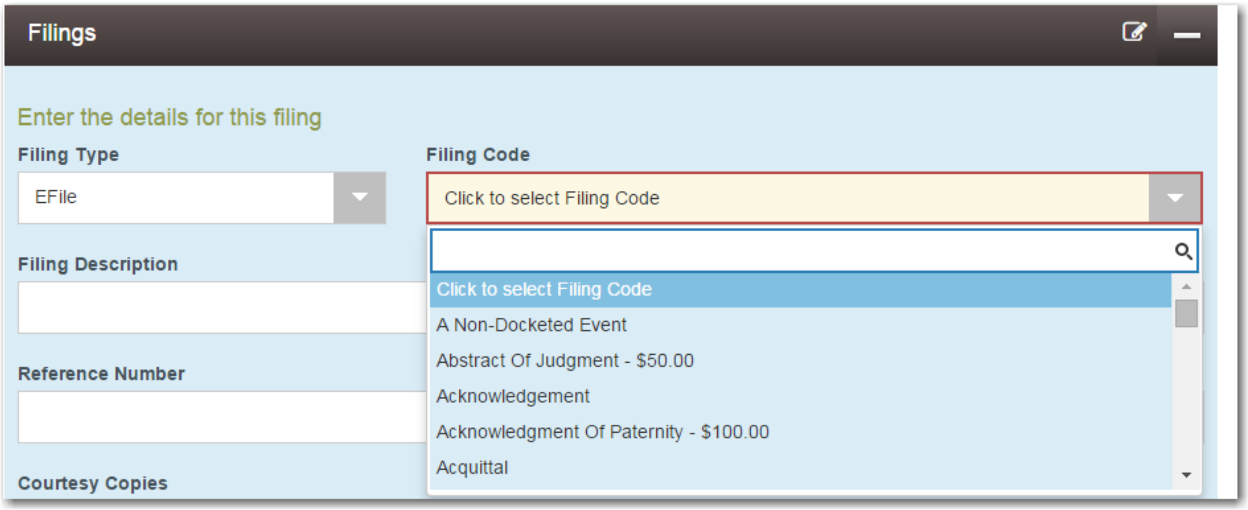


Figure 9.5 – Filing Code Drop-Down List

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

Figure 9.6 – Filing Code Field with Fee Displayed

Note: Depending on your system configuration, some filing codes cause the Due Date field to be enabled.

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

d. Type a reference number in the **Reference Number** field.

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

e. Type any relevant comments in the **Filing Comments** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

Note: The Due Date field is configured by Tyler and may not be available on your system.

A calendar is displayed from which you can select the specified date.

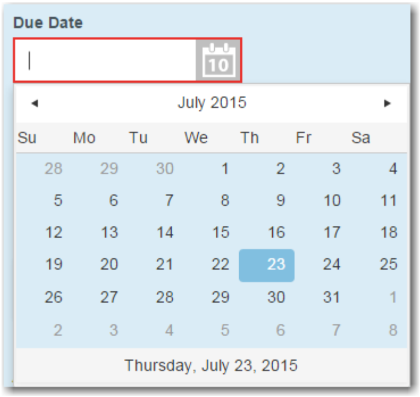


Figure 9.7 – Due Date Calendar

h. Click the **Related Parties** field to select the parties from the drop-down list.

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

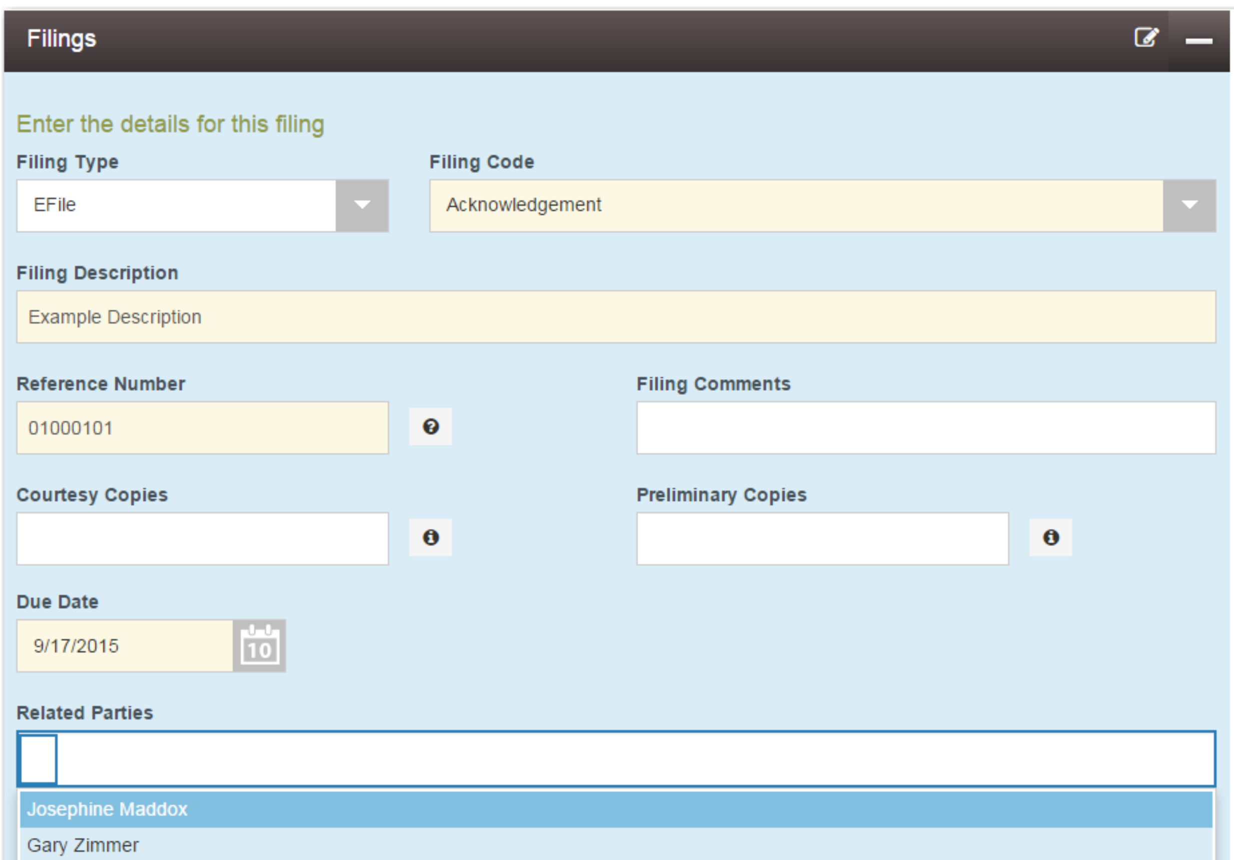


Figure 9.8 – Related Parties in the Filings Section

i. Click the **Lead Document** field to select a lead document to load.

Note: This field is required. Only one document can be uploaded as a lead document.

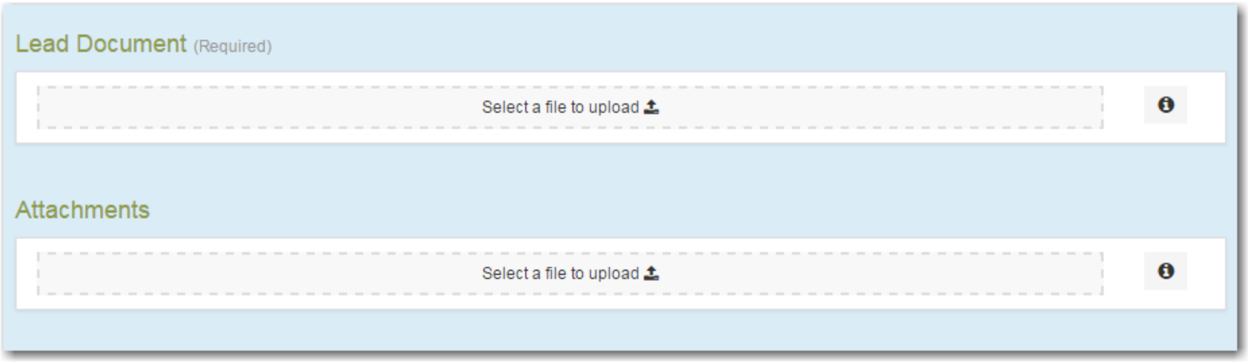


Figure 9.9 – Lead Document and Attachments Fields in the Filings Section

j. Type a name for the lead document in the **Description** field.

k. Click the **Security** drop-down list to select the level of security to attach to the document.

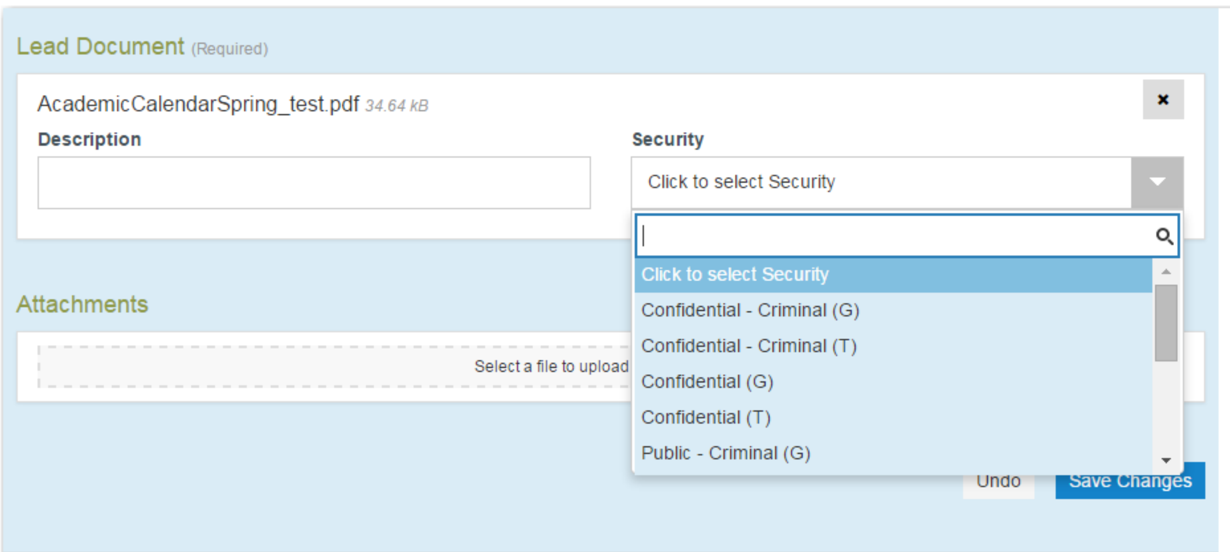


Figure 9.10 – Security Field Drop-Down List in the Lead Document Section

l. If you have attachments to load, click the **Attachments** field to select the documents to load.

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

m. Click Save Changes to save your changes, or click Undo to cancel the action.

If you save your changes, a new section called **Optional Services** is displayed.

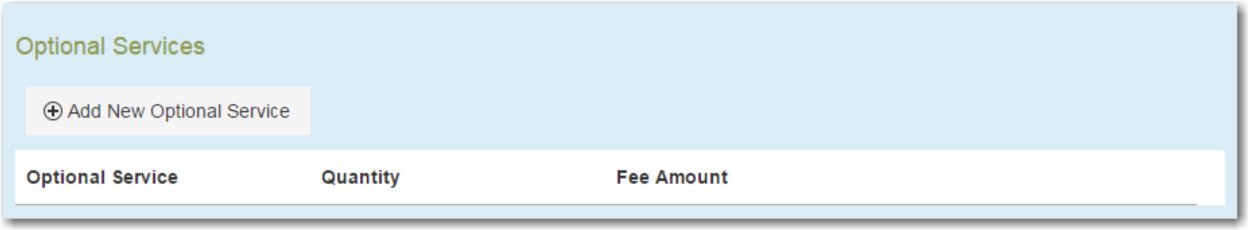
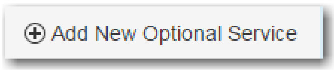


Figure 9.11 – Optional Services Section

n. Click 

to add an optional service to the lead document.

The **Optional Service** field is displayed.

o. Select a service from the **Optional Service** drop-down list.

Note: The fee associated with the optional service is displayed.

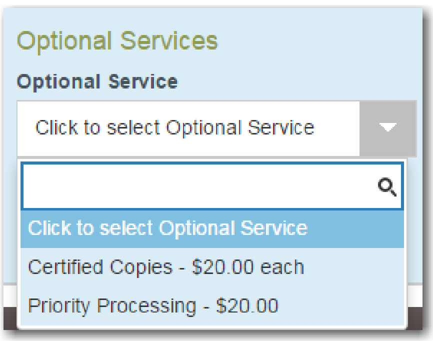
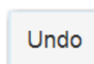


Figure 9.12 – Optional Service Drop-Down List

p. Click 

to save your changes, or click 

to cancel the action.

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

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

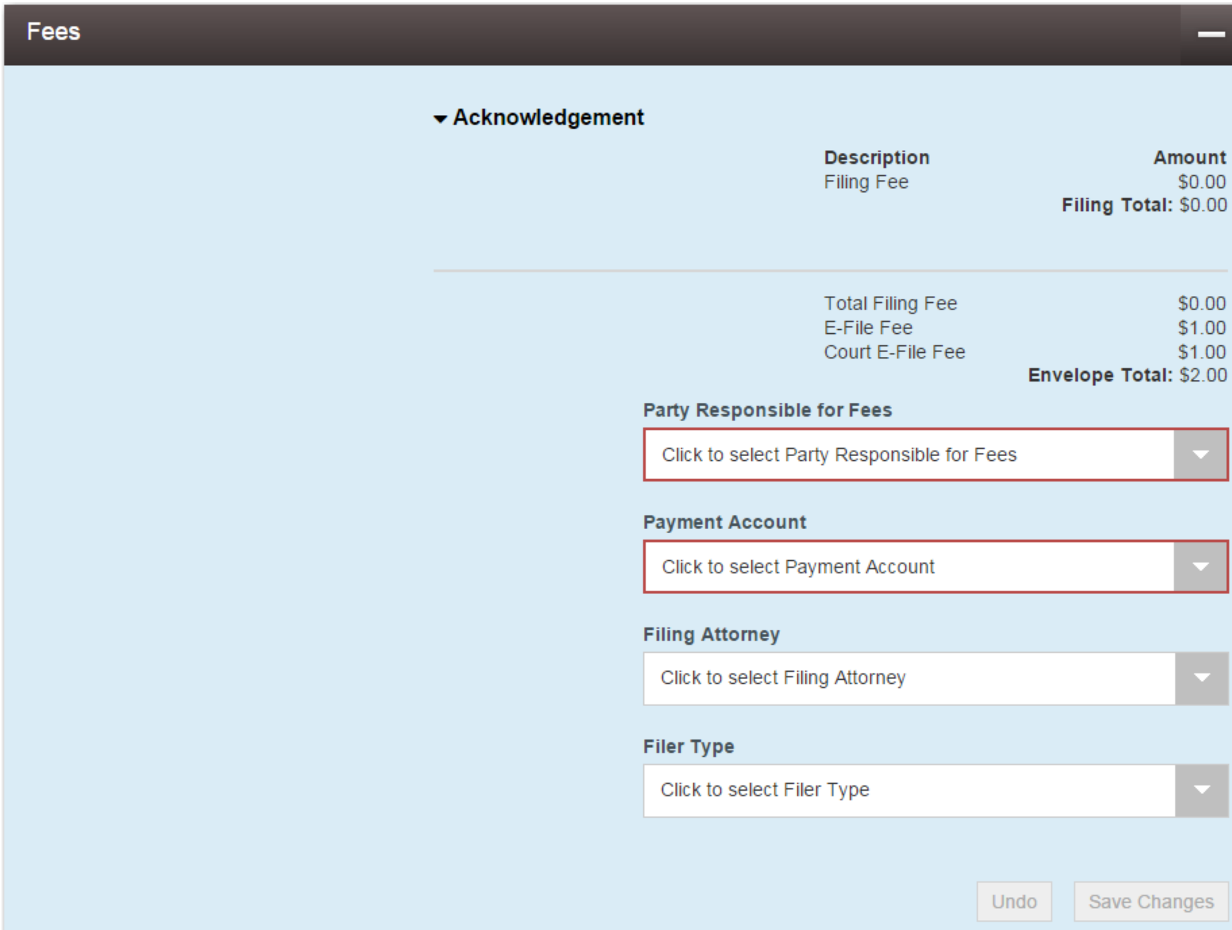


Figure 9.13 – Fees Section

a. Select the party that is responsible for paying the fees in the **Party Responsible for Fees** field.

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

Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

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

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

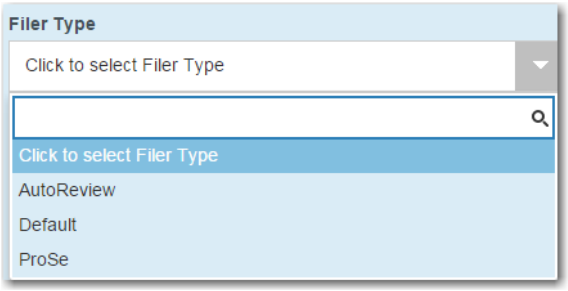


Figure 9.14 – Filer Type Drop-Down List

   e. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.

3. In the **Submission Agreements** section, select the check box for the appropriate submission agreement.

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

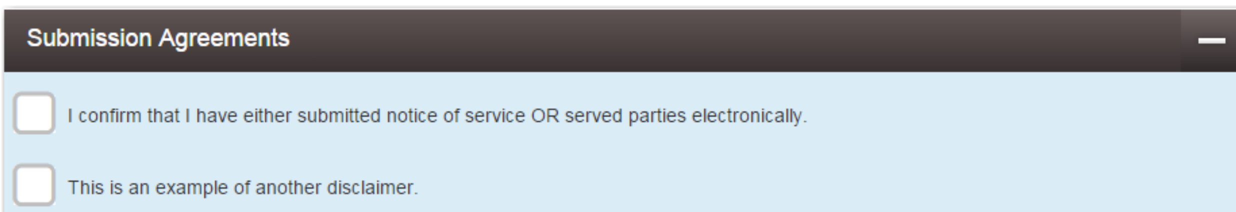


Figure 9.15 – Submission Agreements Section

4. After completing the fields in all of the sections on the page, click **Save as Draft**, or click **Continue**.

   Clicking **Continue** displays a page that reflects your filing.

5. Review the page for accuracy. If you need to make any changes, click **Back** to return to the previous page. Make any necessary corrections, and then click **Continue**.

6. Review the page. After you are satisfied with the information in your filing, click **Submit**.

   A new **Envelope** of your filing is included on the *Filing History* page.

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

Submission Agreements

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

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

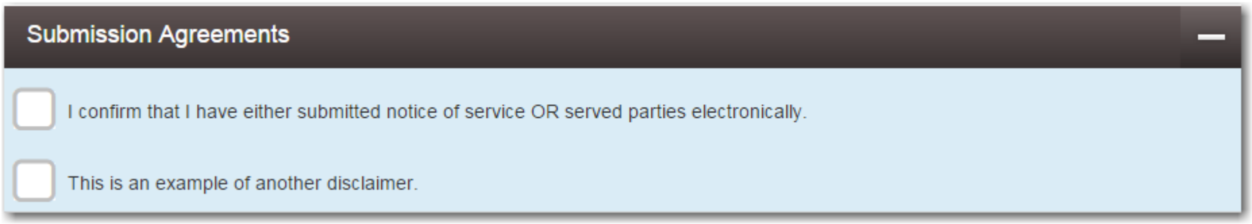


Figure 9.16 – Submission Agreements Dialog Box

Viewing the Envelope Summary

The envelope summary provides a summary of case information, such as the location of the filing, the parties involved in the case, filing details, fees, and payments for the case. The date and time that the filing was submitted are also displayed. The time stamp corresponds to the time zone in which the filing occurred.

The party, filings, and fees information must be complete before you can view the envelope summary. A payment account must be assigned to the case to complete the filing process.

Perform the following steps to view the envelope summary:

1. From the *Filing History* page, locate the envelope for which you want to view the summary. Select **View Filing Details** from the **Actions** drop-down list for the specified envelope.

   The *Envelope* page opens.

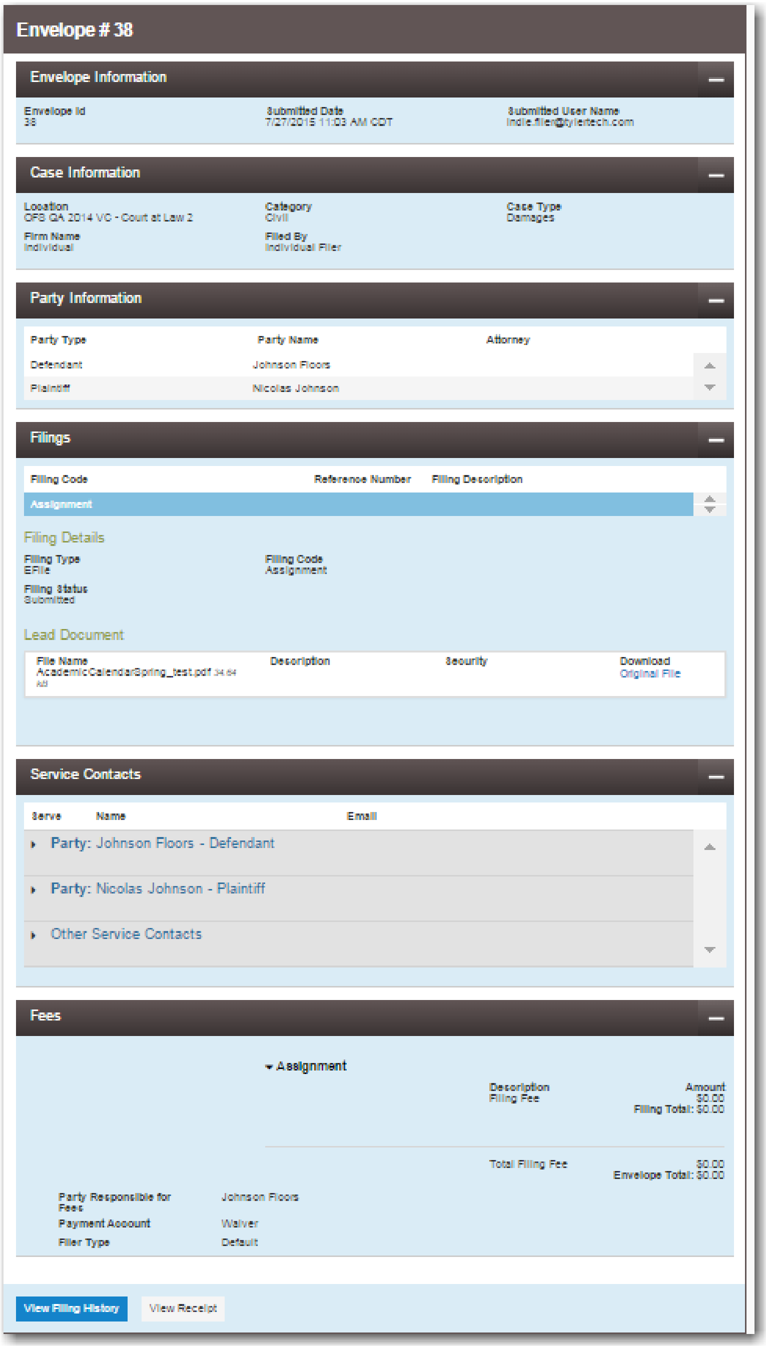


Figure 9.17 – Envelope # 38 Page

2. To return to the *Filing History* page, either select **Filing History** from the **Actions** drop-down list, or click 

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Chapter 10 Existing Case Filing

Topics Covered in This Chapter

Filing Into an Existing Case

Once a new case has been created by the courts, you can file into the existing case.

Perform the following steps to file into an existing case:

1. Select one of the following methods to begin your filing:

    - Click **File into Existing Case** from the *Filer Dashboard* page.

      Note: The *File Into Existing Case* page opens. Click Search to locate the case that you want.

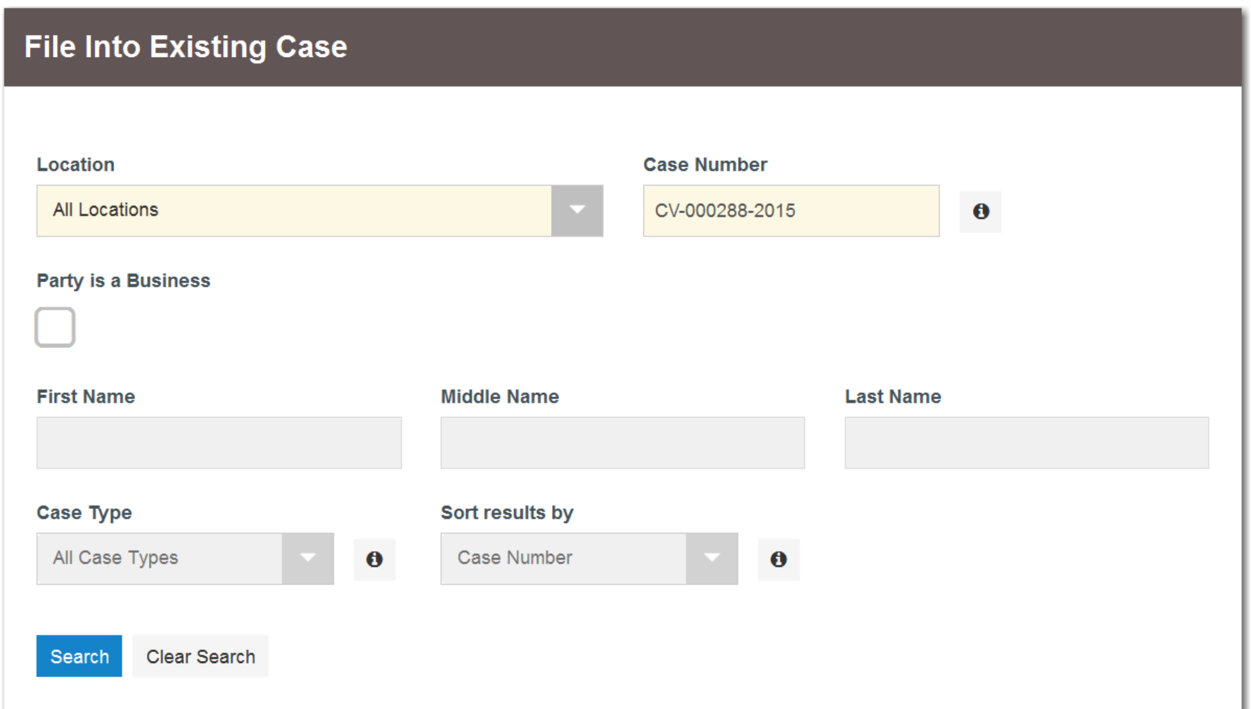


Figure 10.1 – File Into Existing Case Page

Note: When the correct case is displayed, select File Into Case from the Actions drop-down list for the specified case.

Figure 10.2 – Actions Drop-Down List

- Select **File Into Existing Case** from the **Actions** drop-down list. **Note: The *File Into Existing Case* page opens. Click Search to locate the case that you want. When the correct case is displayed, select File Into Case from the Actions drop-down list for the specified case.**
- From the *Filing History* page, locate the case that you want to file into. From the **Actions** drop-down list for the specified case, select **File Into Case**.

Note: The Case Information and Party Information fields are already populated since this is an existing case. Add additional parties if you want.

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

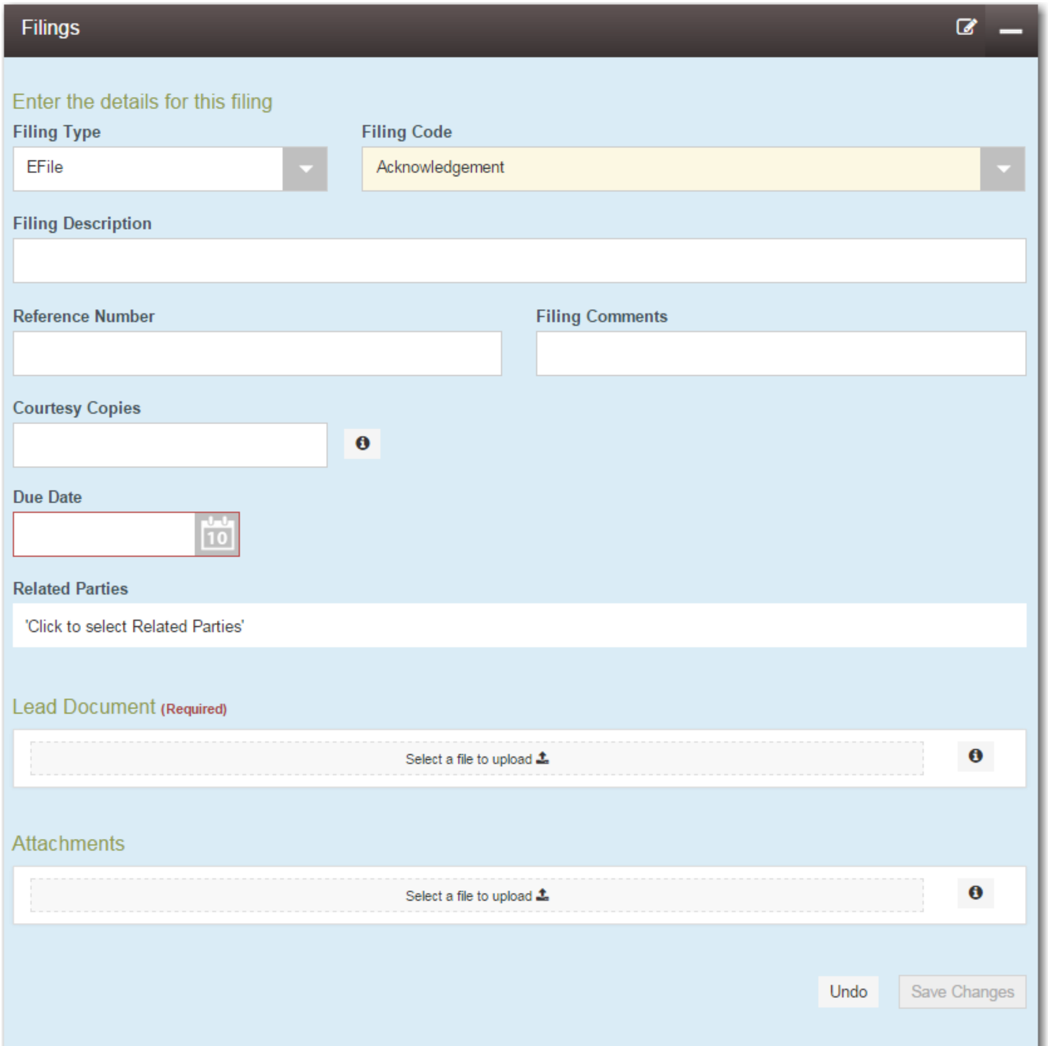


Figure 10.3 – Filings Section

a. Select a filing type from the **Filing Type** drop-down list.
b. Select a filing code from the drop-down list in the **Filing Code** field.

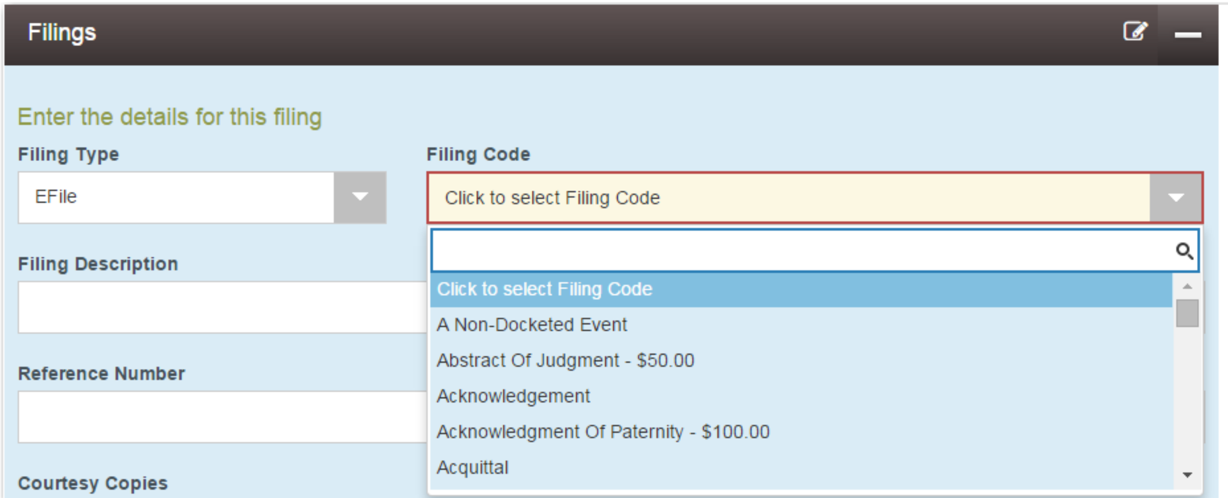


Figure 10.4 – Filing Code Field with Drop-Down List Displayed

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

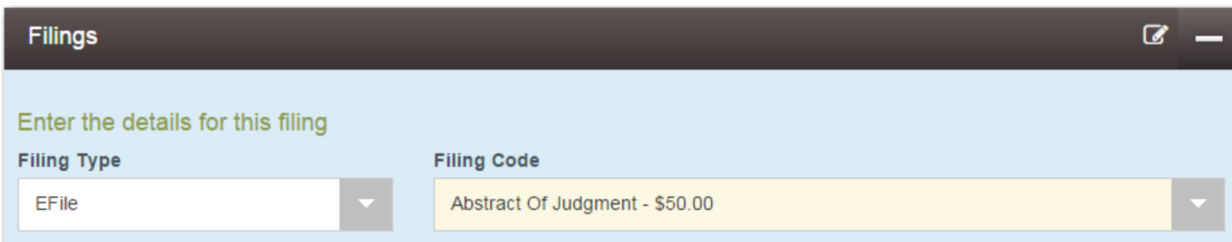


Figure 10.5 – Filing Code Field with Fee Displayed

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

d. Type a reference number in the **Reference Number** field.

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

e. Type any relevant comments in the **Filing Comments** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

Note: The Due Date field is configured by Tyler and may not be available on your system.

A calendar is displayed from which you can select the specified date.

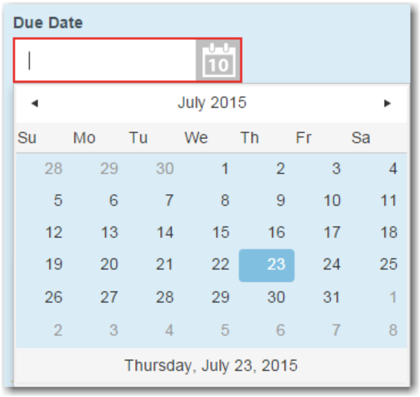


Figure 10.6 – Due Date Calendar

h. Click the **Related Parties** field to select the parties from the drop-down list that is displayed.

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

Figure 10.7 – Related Parties in the Filings Section

i. Click the **Lead Document** field to select a lead document to load.

Note: This field is required. Only one document can be uploaded as a lead document.

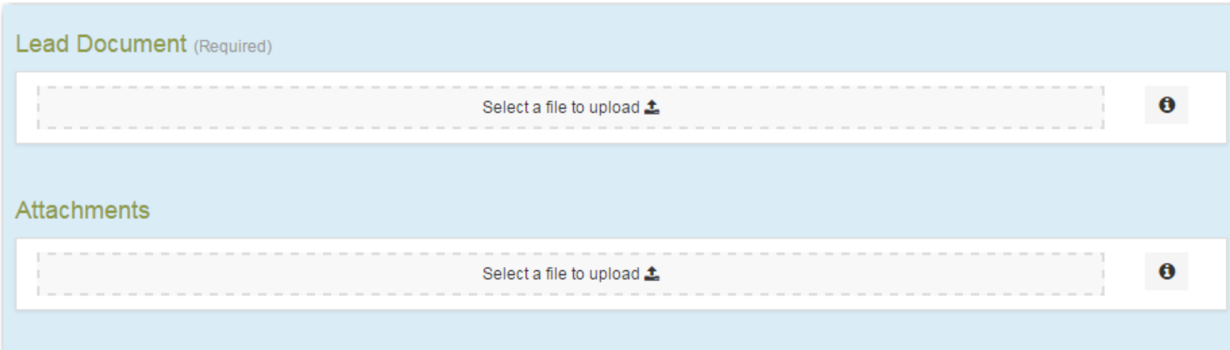


Figure 10.8 – Lead Document and Attachments Fields in the Filings Section

j. Type a name for the lead document in the **Description** field.

k. Click the drop-down list in the **Security** field to select the level of security to attach to the document.

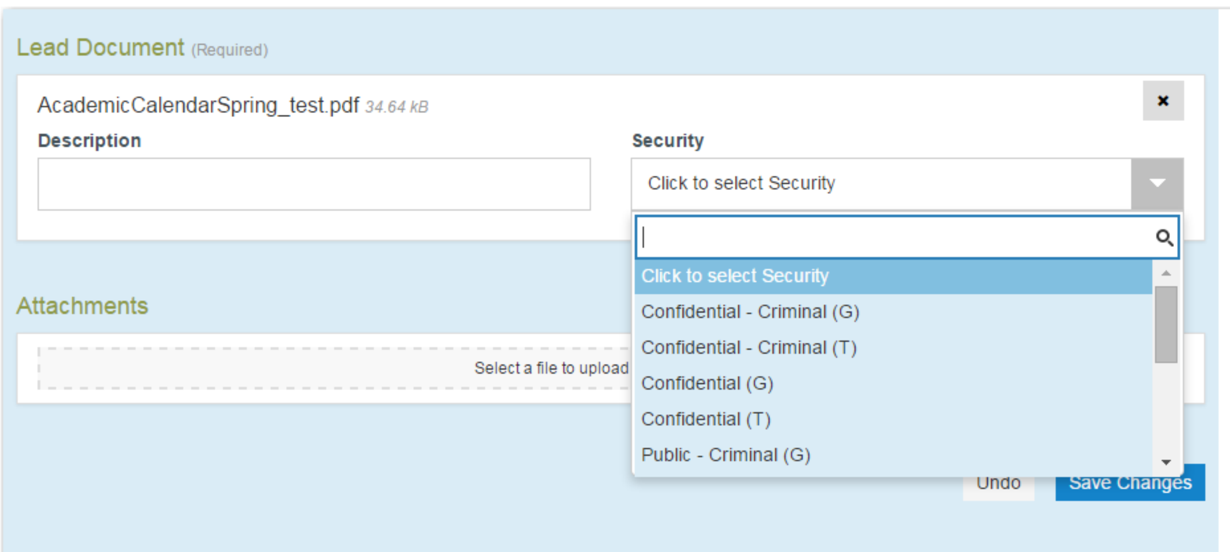


Figure 10.9 – Security Field Drop-Down List in the Lead Document Section

l. If you have attachments to load, click the **Attachments** field to select the documents to load.

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

m. Click Save Changes to save your changes, or click Undo to cancel the action.

If you save your changes, a section called **Optional Services** is displayed.

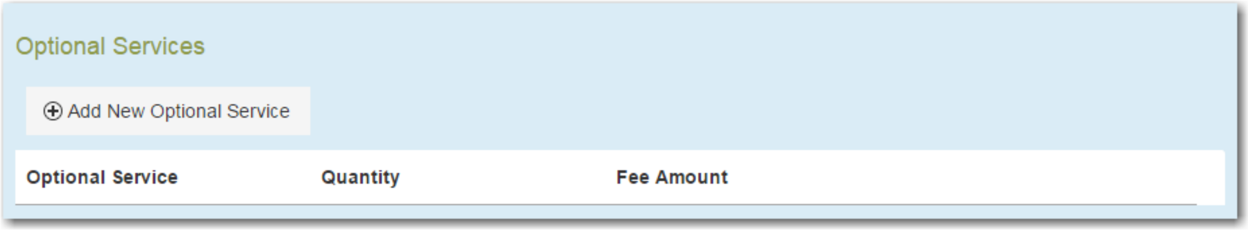
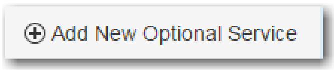


Figure 10.10 – Optional Services Section

n. Click  to add an optional service to the lead document.

The **Optional Service** field is displayed.

o. Select a service from the drop-down list in the **Optional Service** field.

Note: The fee associated with the optional service is displayed.

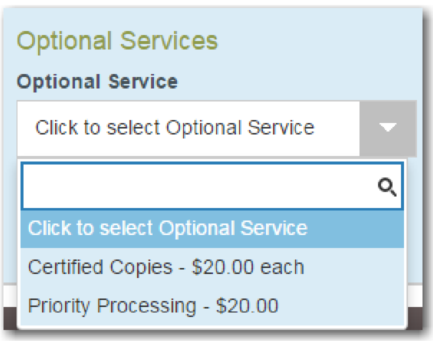
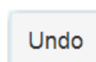


Figure 10.11 – Optional Service Drop-Down List

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

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

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

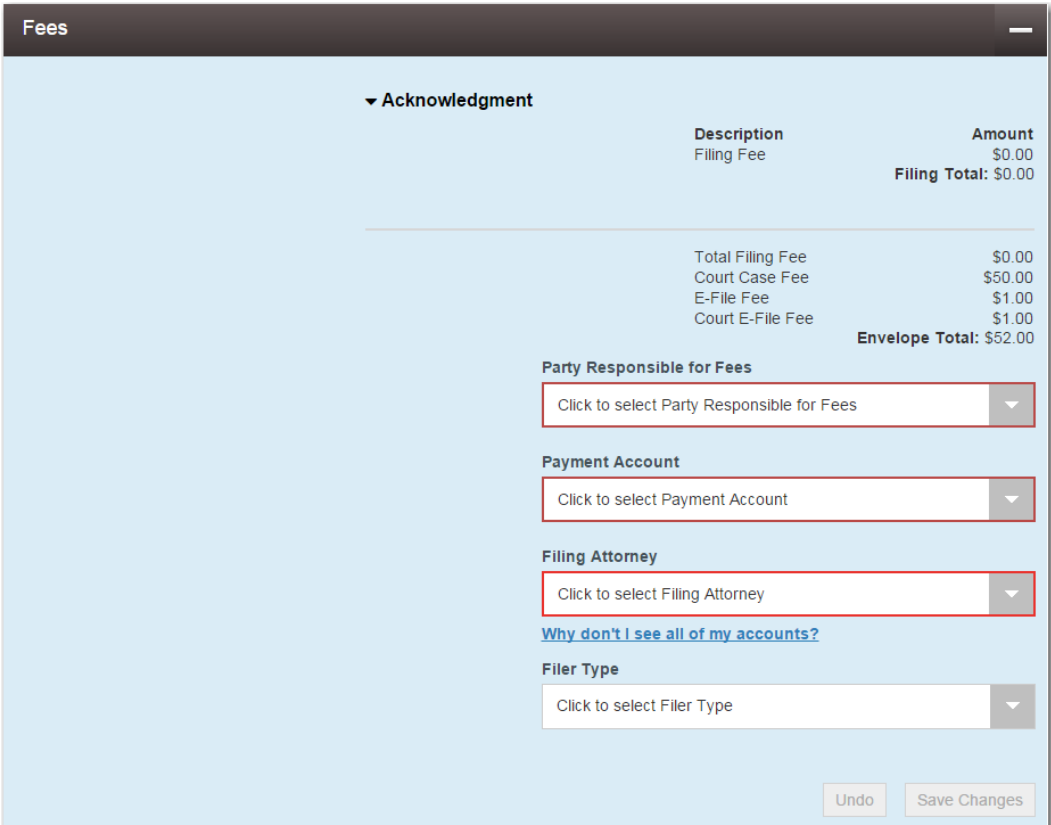


Figure 10.12 – Fees Section

a. Select the party that is responsible for paying the fees in the **Party Responsible for Fees** field.

b. Select the payment account from the drop-down list in the **Payment Account** field.

Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

c. Select the filing attorney from the drop-down list in the **Filing Attorney** field.

d. Select the filer type from the drop-down list in the **Filer Type** field.

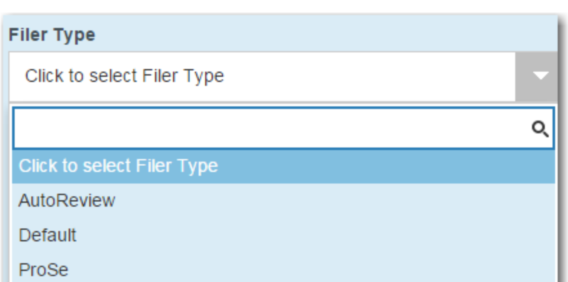
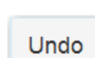


Figure 10.13 – Filer Type Drop-Down List

e. Click 

to save your changes, or click 

to cancel the action.

4. Click either **Save as Draft**, or click **Continue**.

   Clicking **Continue** displays a page that reflects your filing.

5. Review the page, and then click **Submit**.

   A new **Envelope** of your filing is included on the *Filing History* page.

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

Filing an Appeal to an Existing Case

Note: The Appellate option is configured by Tyler and may not be available on your system.

Perform the following steps to file an appeal to an existing case using the Appellate option:

1. Select **Start a New Case** from the **Actions** drop-down list, or click **Start a New Case** from the **Filer Dashboard** under the **New Filing** header.

   The *Add Filing* page opens.

2. Complete the details for the appeal by using the drop-down lists in the required fields in the **Case Information** section:

   Note: A red box around a field indicates that it is required.

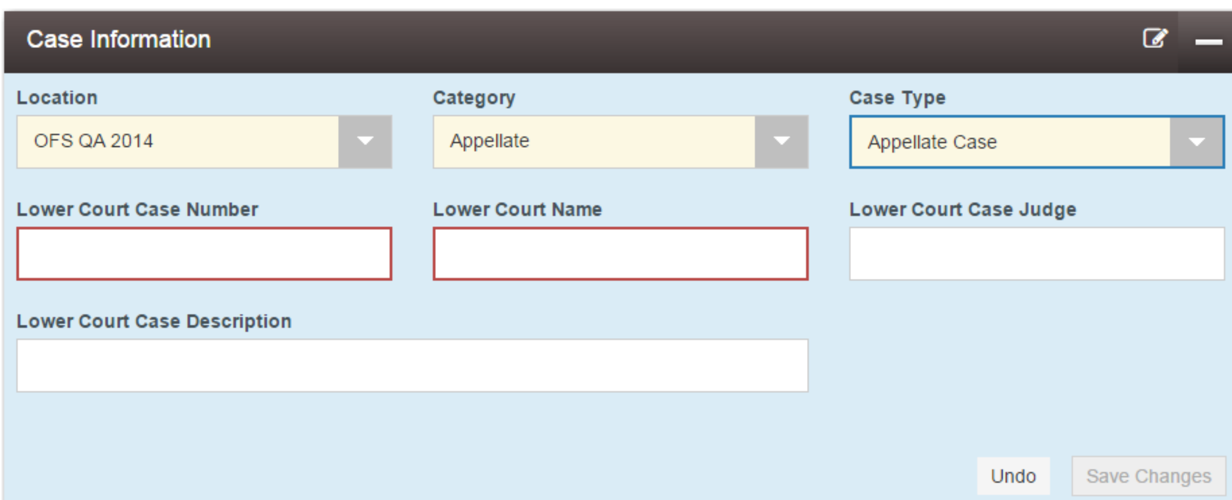


Figure 10.14 – Appellate Selections in the Case Information Section

   a. Select your location (i.e., the court where you will be doing the filing).
   b. Select **Appellate** in the **Category** field.
   c. Select **Appellate Case** in the **Case Type** field.
   d. Type the original case number in the **Lower Court Case Number** field.
   e. Type the name of the lower court in the **Lower Court Name** field.

f. Type the name of the lower court case judge in the **Lower Court Case Judge** field.

g. Type a description of the original case in the **Lower Court Case Description** field.

3. After completing the required fields, click Save Changes.

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

Chapter 11 Service Contacts

Topics Covered in This Chapter

You can view the current service contacts and add service contacts to a case.

Adding Service Contacts to the Firm

You can add service contacts to the list of contacts associated with your firm.

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

1. From the Actions drop-down list, click **Firm Service Contacts**.

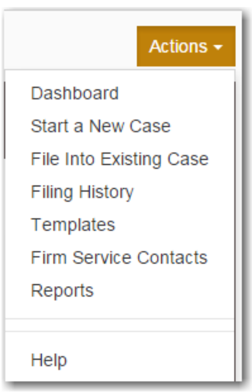


Figure 11.1 – Actions Drop-Down List

The *Firm Service Contacts* page opens.

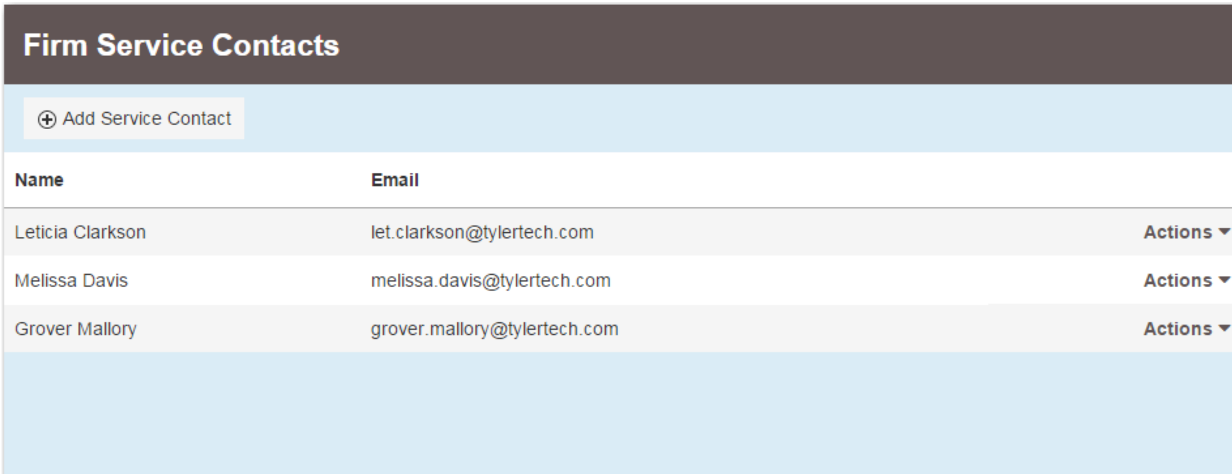
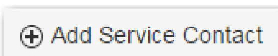


Figure 11.2 – Firm Service Contacts Page

2. Click 

.

   The *Firm Service Contacts* page opens.

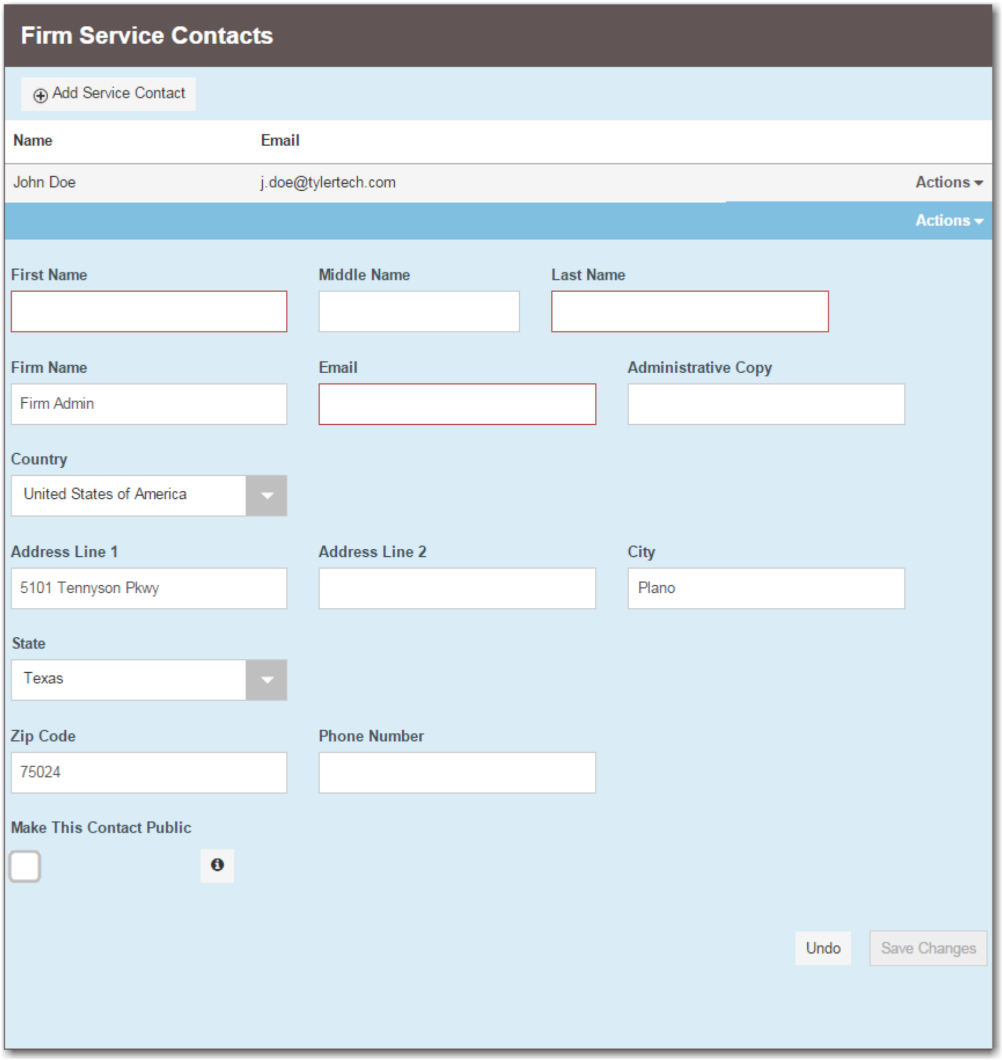


Figure 11.3 – Firm Service Contacts Page for Adding a New Contact

3. Complete the required fields to add the new service contact: **First Name**, **Last Name**, and **Email**.
4. If you want to make the contact available to any filer, select the **Make This Contact Public** check box.
5. Click Save Changes to save the contact, or click Undo to cancel the action.

   If you click Save Changes, the new contact information is displayed in the **Firm Service Contacts** list.

Adding Service Contacts to a Case

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

1. From the *Filing History* page, locate the case to which you want to add a service contact. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

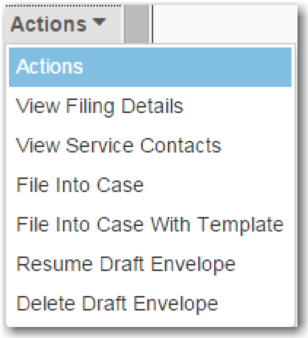


Figure 11.4 – Actions Drop-Down List

The *Service Contacts* page for the specified case opens.

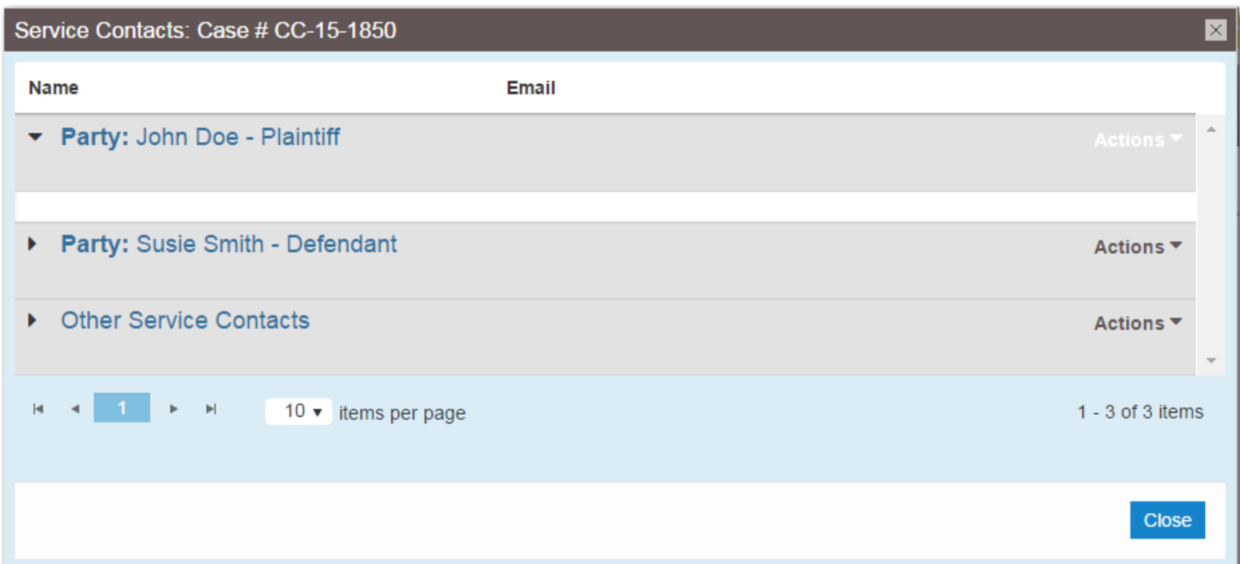


Figure 11.5 – Service Contacts: Case# CC-15-1850 Page

2. Locate the party to which you want to add a service contact. From the **Actions** drop-down list for the specified party, select **Add From Firm Service Contacts**.

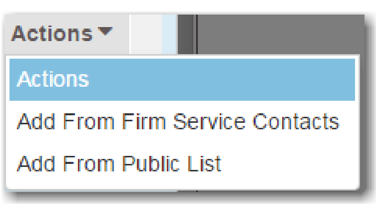


Figure 11.6 – Service Contacts Actions Drop-Down List

The *Add From Firm Service Contacts* dialog box opens.

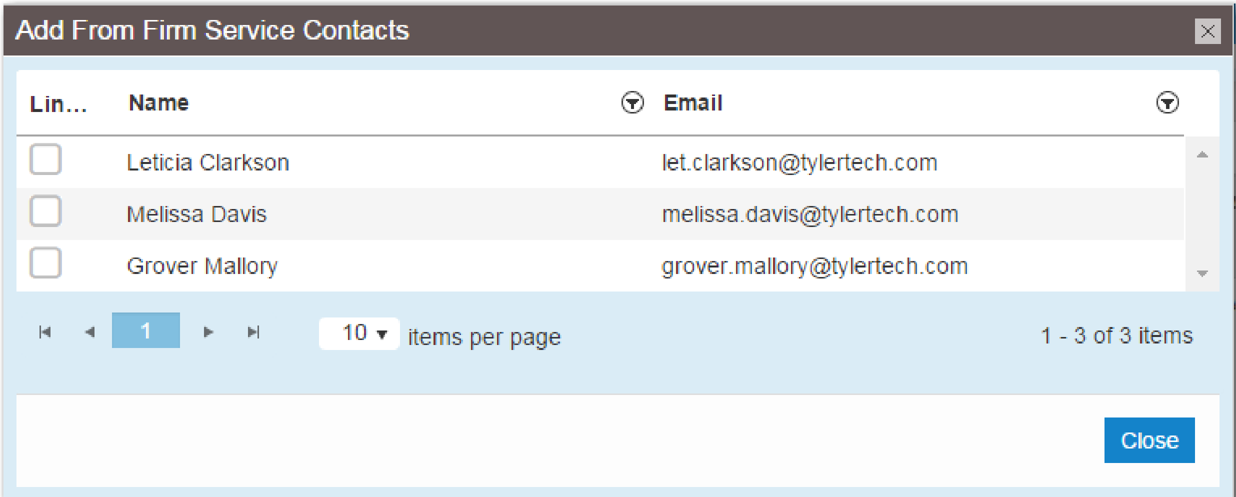


Figure 11.7 – Add From Firm Service Contacts Dialog Box

3. Select the check box next to the service contacts that you want to add to the case.

4. After selecting the new service contacts, click 

.

   The new service contacts are now displayed on the *Firm Service Contacts* page under the party to which the service contacts have been added.

5. Click 

to return to the *Filing History* page.

Public Service Contacts

When a service contact is created and associated with a case, it can be designated as a public service contact. When specified as public, the service contact can then be used by anyone outside your firm.

Note: The public service contacts feature is configured by Tyler and may not be available on your system.

In addition, you can add service contacts from a public list to a case that you are starting or filing into.

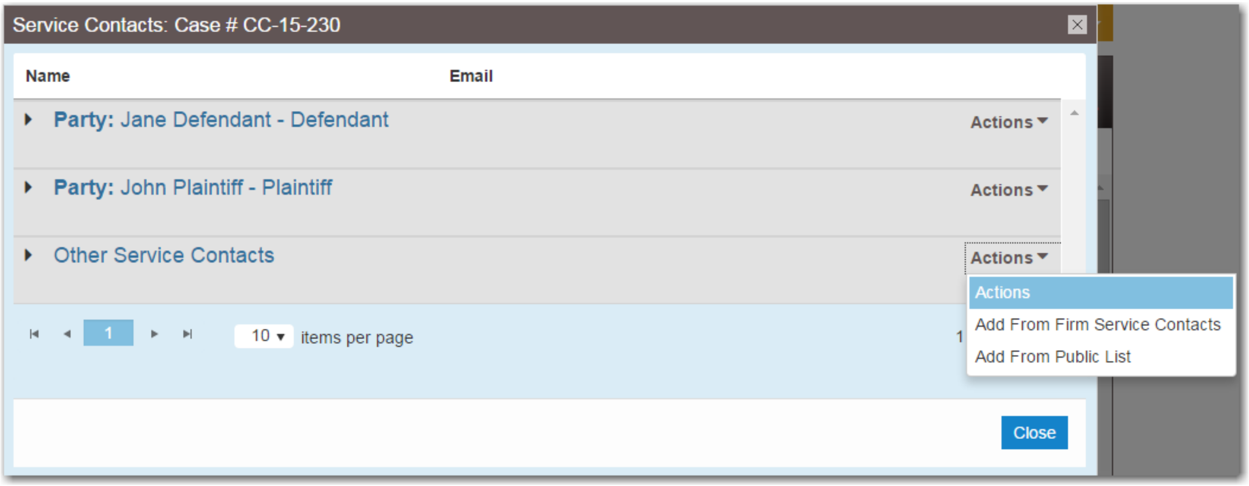


Figure 11.8 – Service Contacts: Case # CC-15-230 Page

Adding Firm Service Contacts from a Public List

Note: The public service contacts feature is configured by Tyler and may not be available on your system.

Perform the following steps to add a firm service contact from a public list:

1. From the *Filing History* page, locate the case to which you want to add a public service contact. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

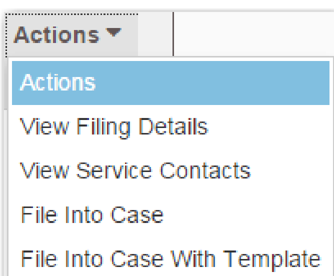


Figure 11.9 – Actions Drop-Down List

The *Service Contacts* page for the specified case opens.

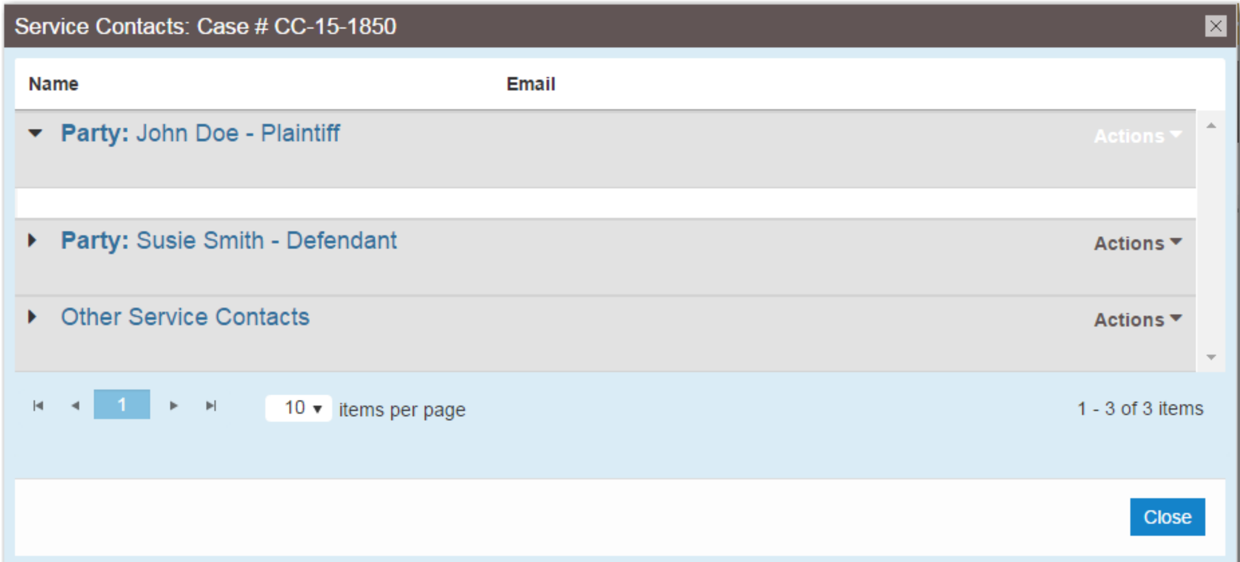


Figure 11.10 – Service Contacts: Case# CC-15-1850 Page

2. Locate the party to which you want to add a public service contact. From the **Actions** drop-down list for the specified party, select **Add From Public List**.

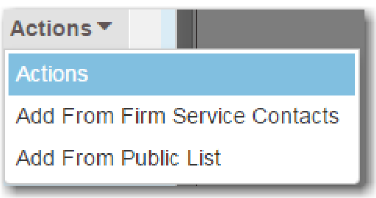


Figure 11.11 – Service Contacts Actions Drop-Down List

The *Add Service Contact from Public List* dialog box opens.

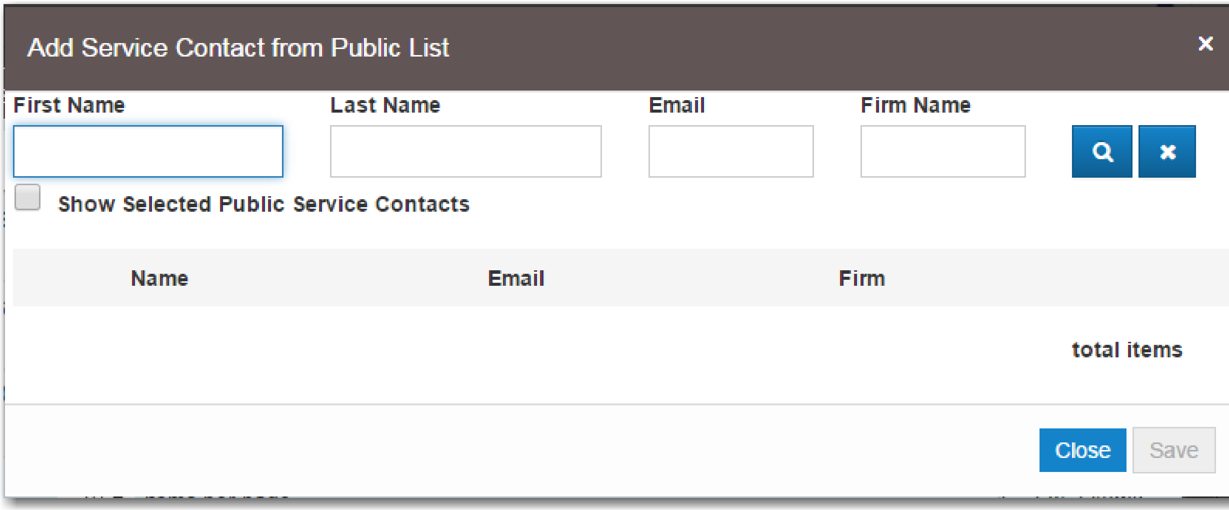


Figure 11.12 – Add Service Contact from Public List Dialog Box

3. Type the name of the service contact, or select the **Show Selected Public Service Contacts** check box to view the possible choices.

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

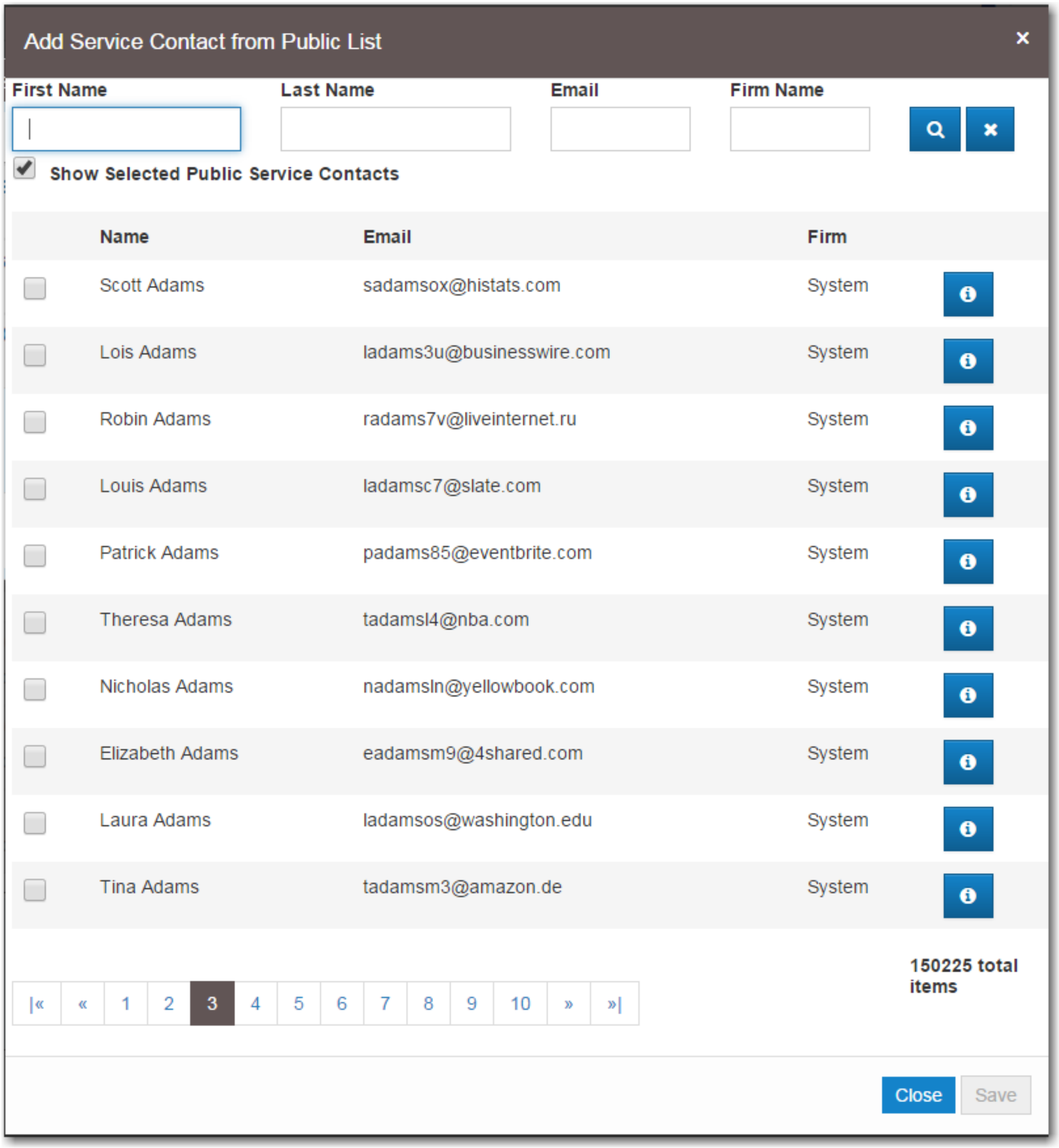


Figure 11.13 – Add Service Contact from Public List Page

4. Click the names of the public service contacts that you want to add to the case.

5. After selecting the public service contacts, click Close.

   The public service contacts are now displayed on the *Service Contacts* page under the party to which the public service contact has been added.

6. Click Close to return to the *Filing History* page.

Selecting the Service Method for Service Contacts

You can select the service method for a service contact when you start a new case or when you add a service contact to an existing case.

Note: These steps are intended for firm filers.

To select the service method for a service contact when starting a new case, perform the following steps:

1. Select **Start a New Case** from the **Actions** drop-down list, or click **Start a New Case** from the **Filer Dashboard** under the **New Filing** header.

   The *Add Filing* page opens.
2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section:

   Note: A red box around the field indicates that it is required.
3. Complete the fields in the **Party Information** section.
4. Enter the filing details for the case in the **Filings** section.
5. In the **Service Contacts** section, locate the party to which you want to add a service contact. From the **Actions** drop-down list for the specified party, select **Add From Firm Service Contacts**.

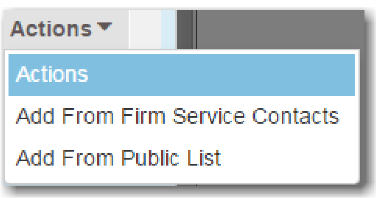


Figure 11.14 – Service Contacts Actions Drop-Down List

   The *Add From Firm Service Contacts* dialog box opens.

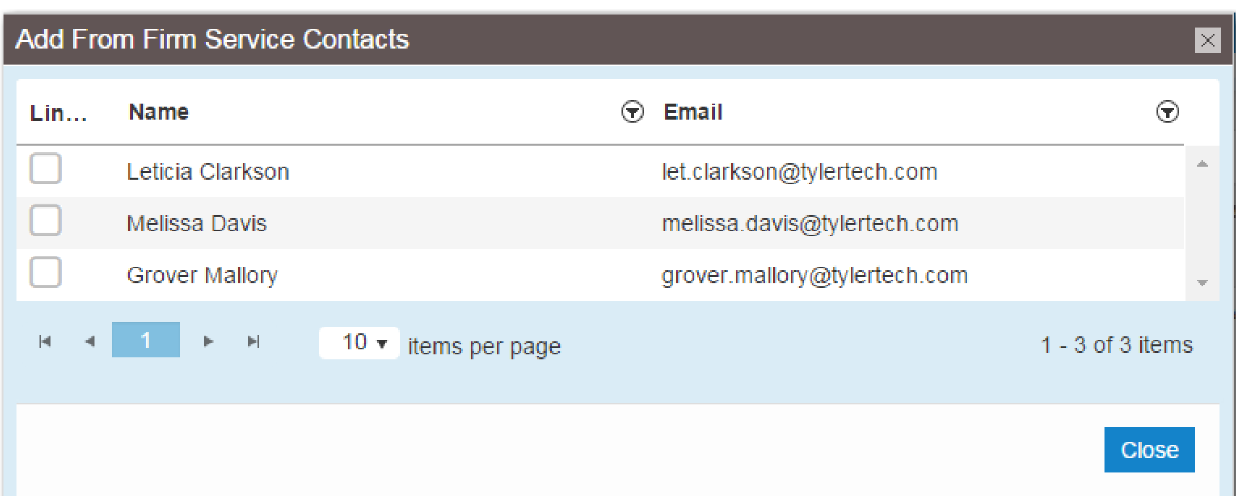


Figure 11.15 – Add From Service Contacts Dialog Box

6. Select the check box next to the service contacts that you want to add to the case.

7. After selecting the new service contacts, click Close.

   The new service contacts are now displayed in the **Service Contacts** section under the party to which the service contact has been added.

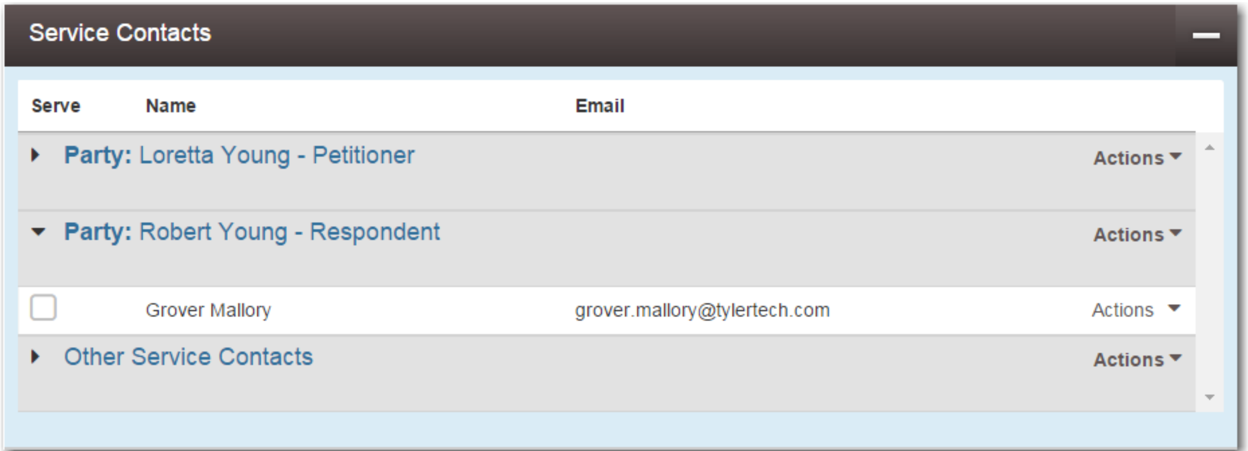


Figure 11.16 – Service Contacts Section

8. In the **Service Contacts** section, click the name of the new service contact that you added to select a service method.

   The **Service Method** field is displayed, along with the rest of the service contact's information.

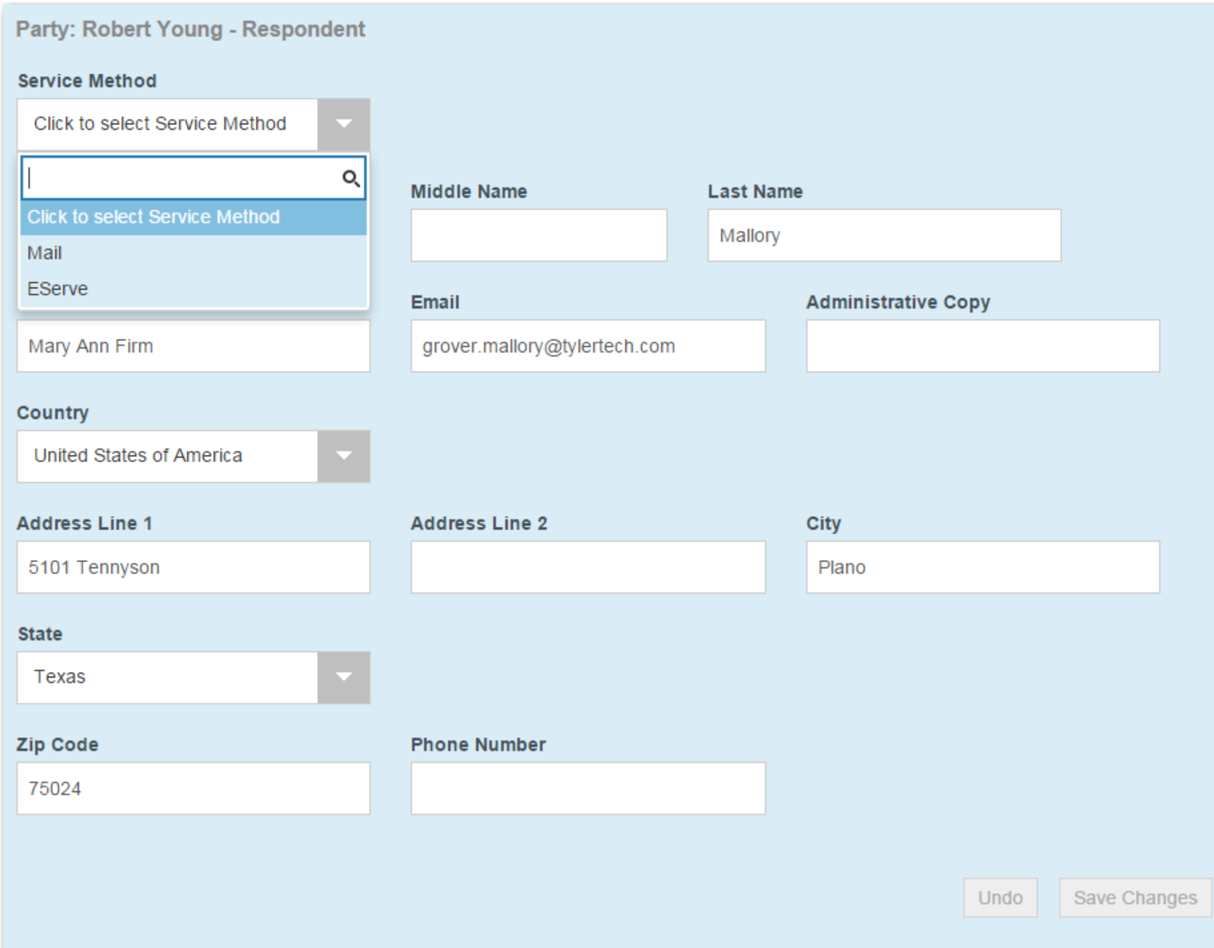


Figure 11.17 – Service Method Field in Service Contacts Section

9. Select the service method that you want from the drop-down list.

   Note: When the service method is set to EServe, an email address is required. When the service method is set to Mail, a street address is required.

10. Click Save Changes.
11. Continue with the rest of your filing (i.e., selecting the fees).
12. When done, click either Save as Draft or Continue.

Viewing Attached Case List of Firm Service Contacts

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

1. From the **Actions** drop-down list, select **Firm Service Contacts**.

   The *Firm Service Contacts* page opens.

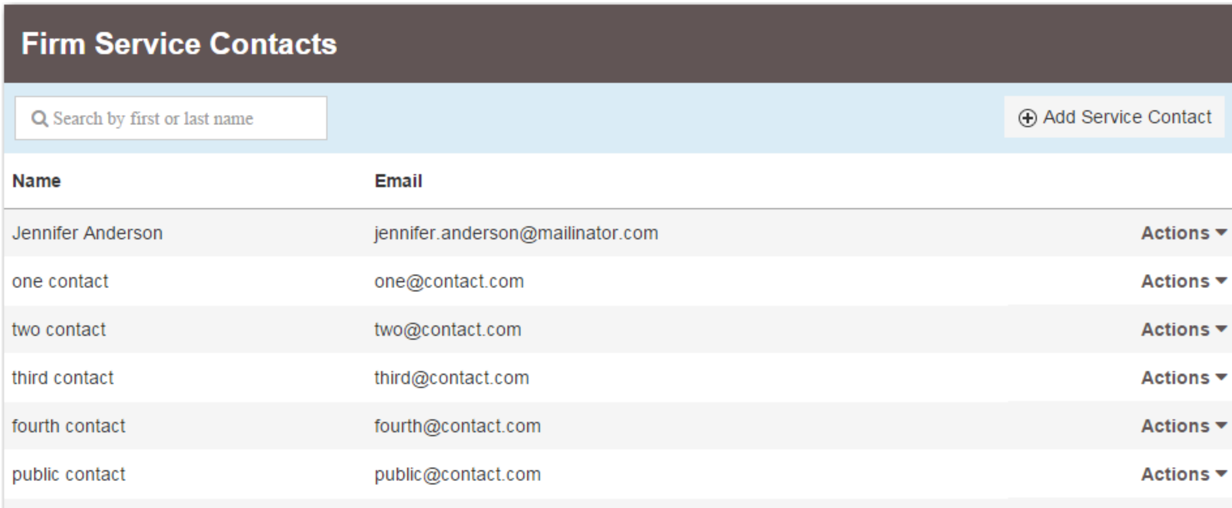


Figure 11.18 – Firm Service Contacts Page

2. Locate the name of the service contact for whom you want to view the attached cases. From the **Actions** drop-down list for the specified contact, select **View Attached Case List**.

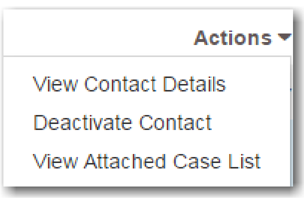


Figure 11.19 – Service Contacts Actions Drop-Down List

The attached case list is displayed.

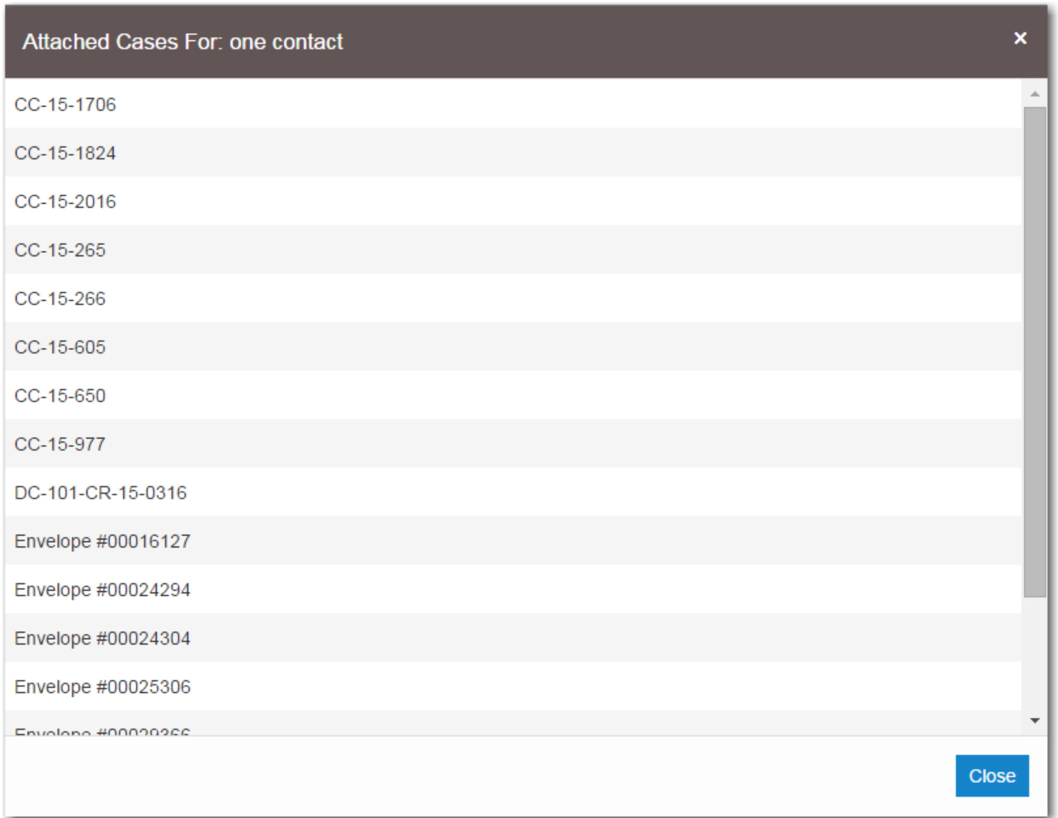


Figure 11.20 – Attached Cases For: one contact Page

Linking a Service Contact to Another Party

You can link a service contact associated to a party on a case to another party on the same case.

To link a service contact to another party, perform the following steps:

1. From the *Filing History* page, locate the case for which you want to modify the service contacts. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

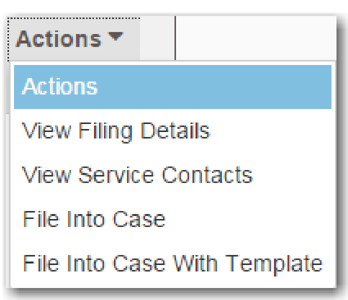


Figure 11.21 – Actions Drop-Down List

The *Service Contacts* page for the specified case opens.

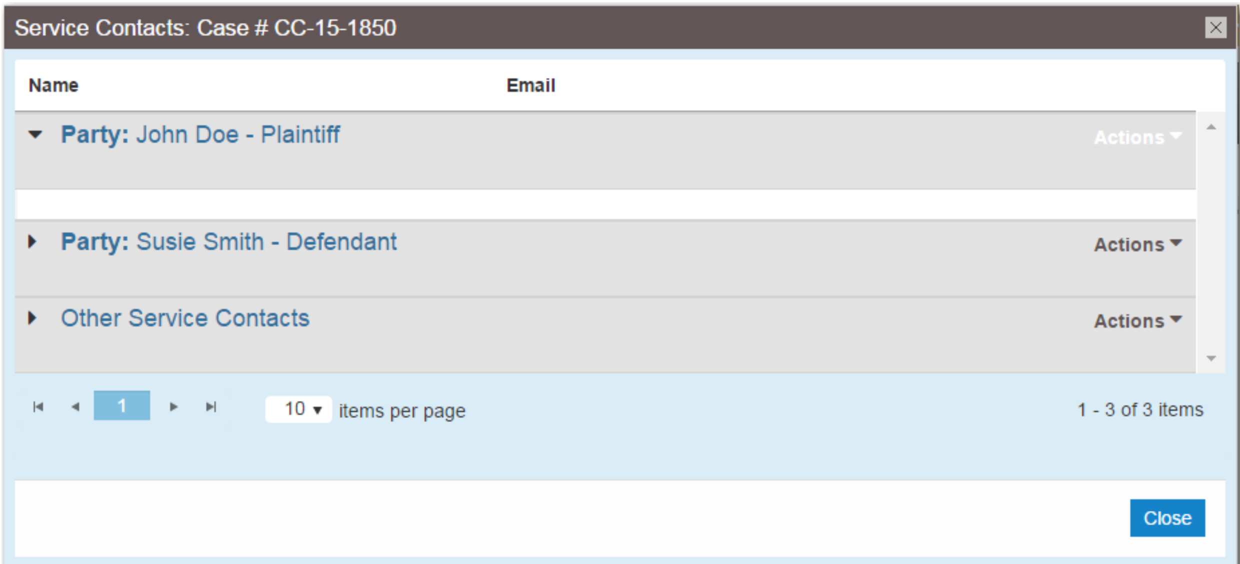


Figure 11.22 – Service Contacts: Case# CC-15-1850 Page

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

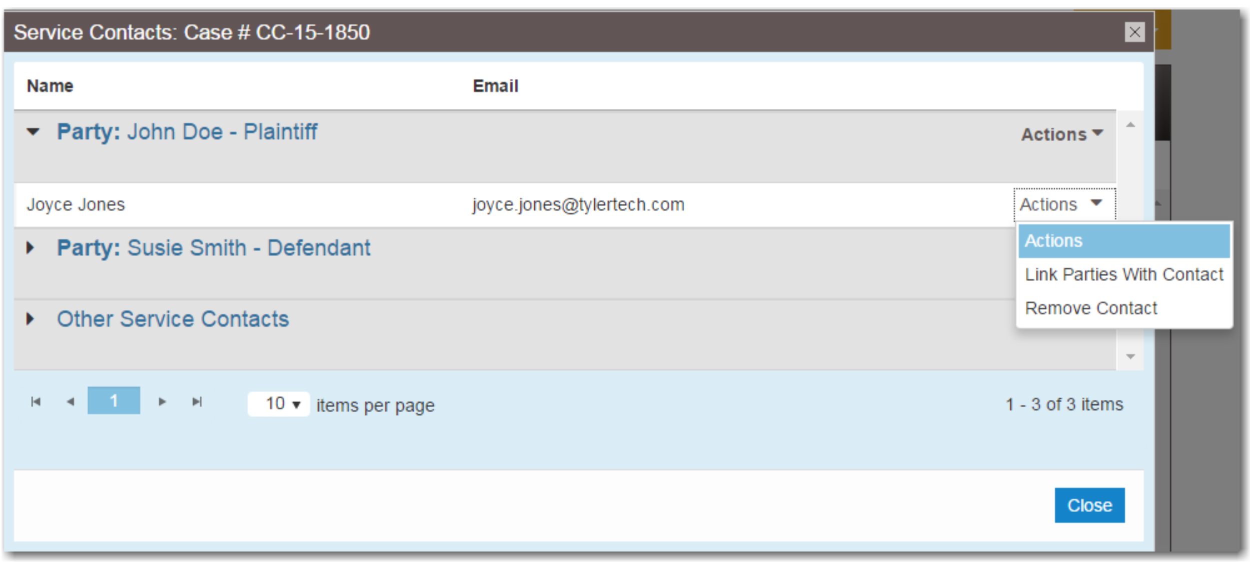


Figure 11.23 – Link Parties with Contact Drop-Down List on the Service Contacts: Case# CC-15-1850 Page

The *Link Parties* dialog box opens. You can link or unlink service contacts to parties on the case by selecting or clearing the check box associated with the party.

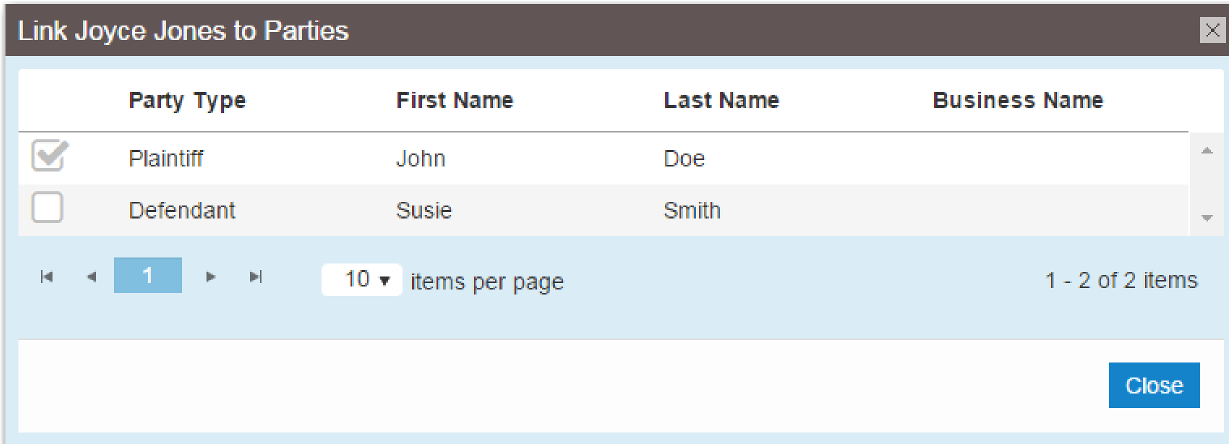


Figure 11.24 – Link Parties Dialog Box

3. Click Close to return to the *Service Contacts* page for the specified case.

SEARCH AND PAGING CAPABILITY FOR FIRM SERVICE CONTACTS

Firm service contacts can be displayed on multiple pages to allow for searching among the contacts.

The paging is activated when more than 10 service contacts exist in the system. You can select the number of items per page to be displayed: 10, 25, or 50.

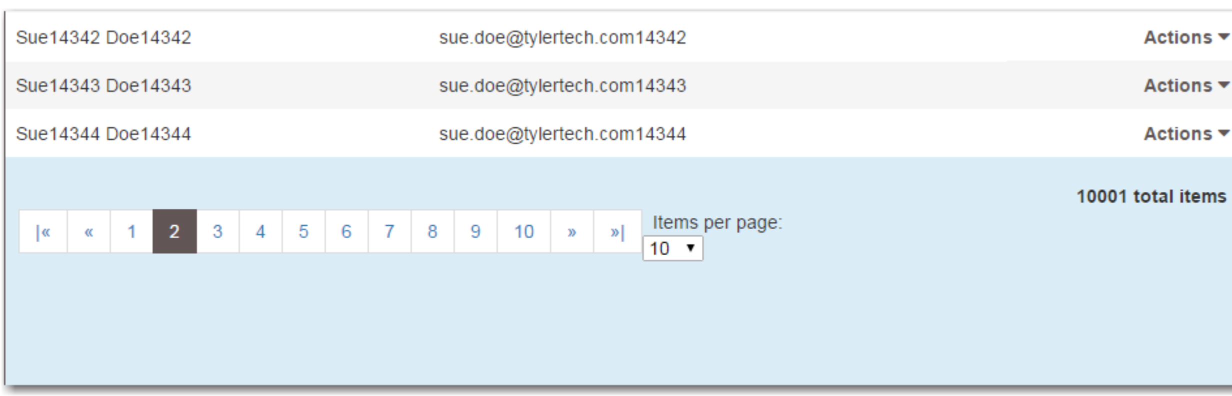


Figure 11.25 – Firm Service Contacts Page with Paging Feature

Also, you can search for a specific service contact by typing part of or the entire contact's name in the text box on the *Firm Service Contacts* search page.

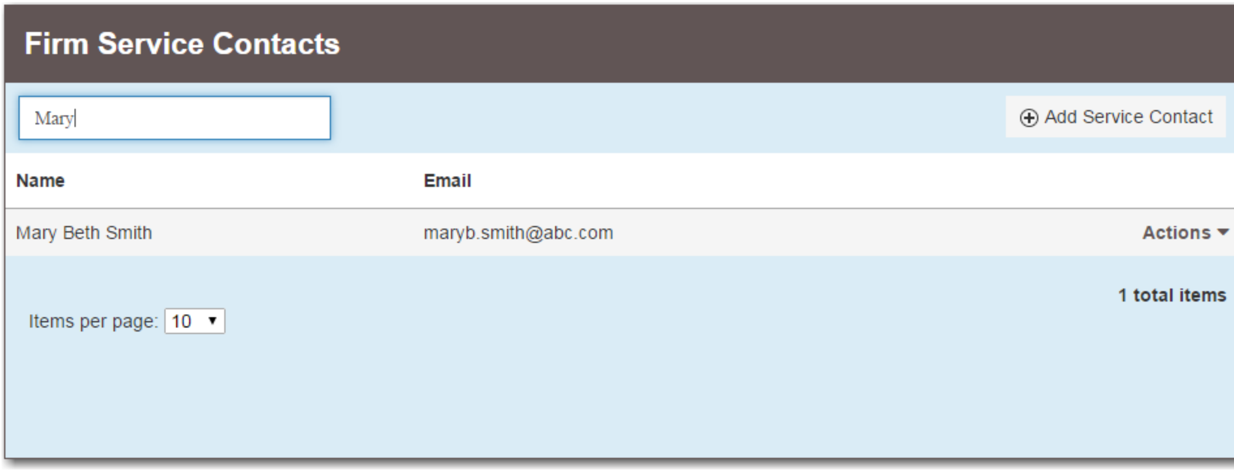


Figure 11.26 – Firm Service Contacts Search Page

Removing a Service Contact from a Case

You can remove a service contact that was previously added to a case.

Note: You can remove a service contact from a case only if you or your firm created that service contact.

To remove a service contact from a case, perform the following steps:

1. From the *Filing History* page, locate the case from which you want to remove a service contact. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

   The *Service Contacts* page for the specified case opens.

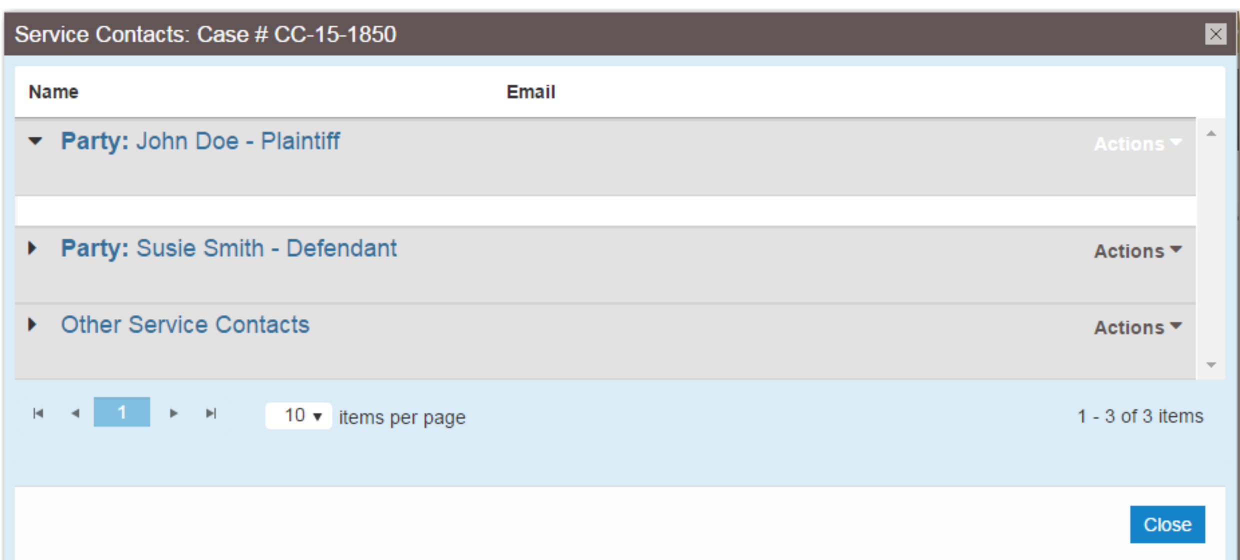


Figure 11.27 – Service Contacts: Case# CC-15-1850 Page

2. Locate the service contact that you want to remove. From the **Actions** drop-down list for the specified contact, select **Remove Contact**.

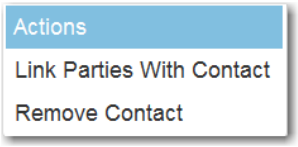


Figure 11.28 – Service Contacts Actions Drop-Down List

The contact is removed from the case.

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

Deactivating a Service Contact from the Firm

You can deactivate a service contact associated with your firm.

Perform the following steps to deactivate a service contact from your firm:

1. From the **Actions** drop-down list, select **Firm Service Contacts**.

   The *Firm Service Contacts* page opens.

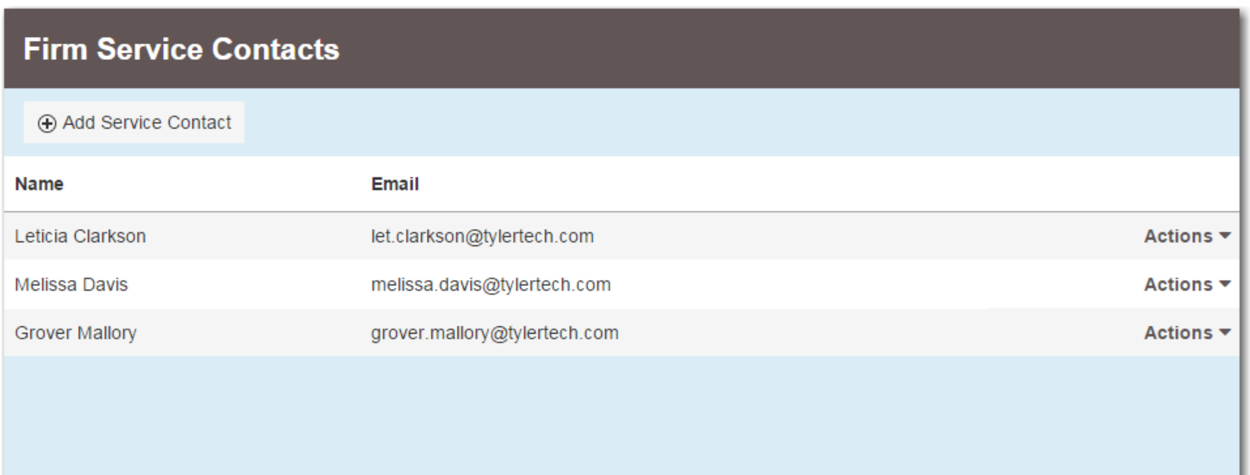


Figure 11.29 – Service Contacts Page

2. Locate the name of the service contact that you want to deactivate. From the **Actions** drop-down list for the specified contact, select **Deactivate Contact**.

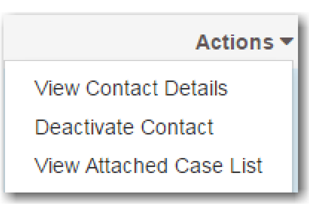


Figure 11.30 – Firm Service Contacts Actions Drop-Down List

The contact is removed from the list and from any filings to which the contact was attached.

Chapter 12 Filings

Topics Covered in This Chapter

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

View Filings

You can view the details of a case after starting a new case or filing into an existing case by using the *Filing History* page.

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

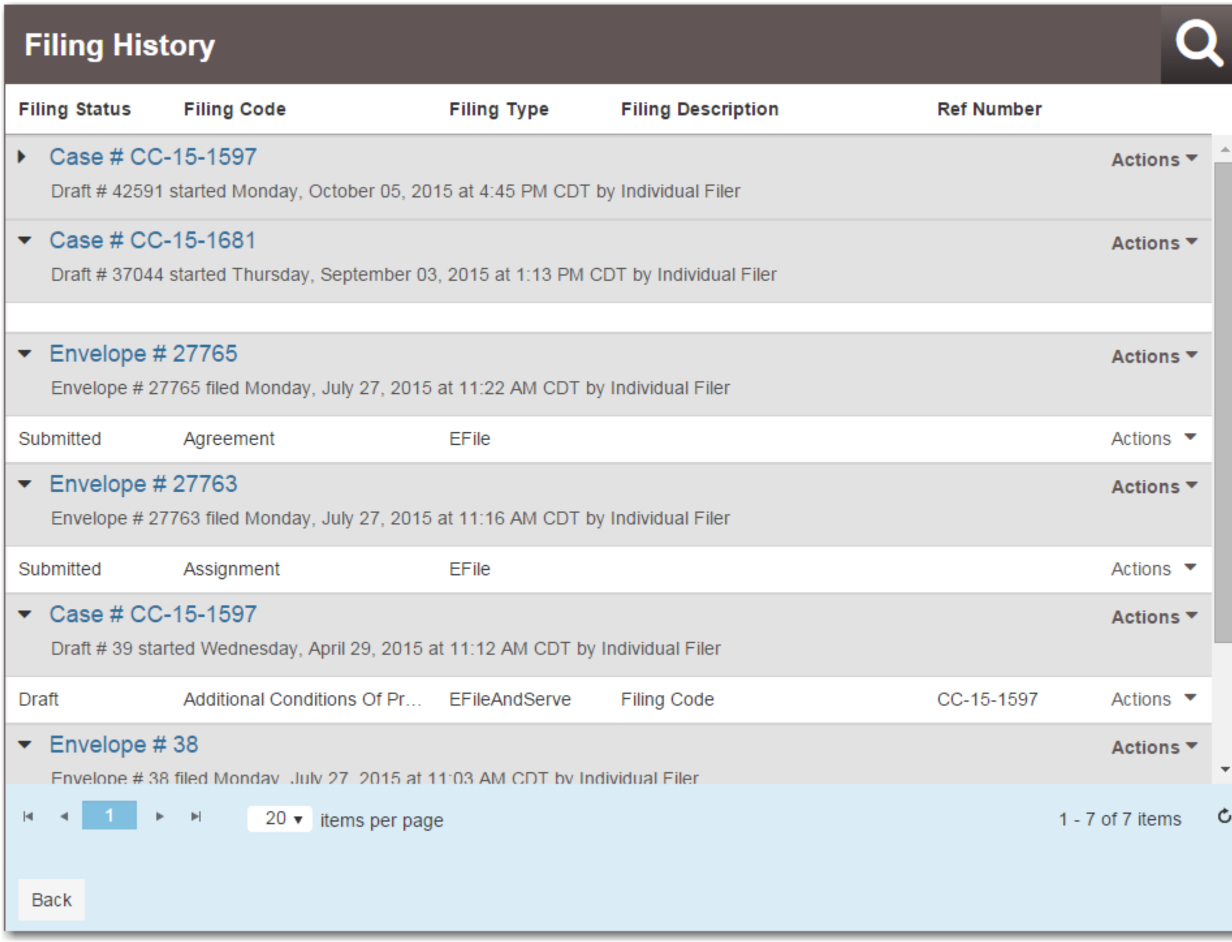


Figure 12.1 – Filing History Page

Filtering the Filings Queue

The *Filing History* page displays the status of each filing. The status information is located in the **Filing Status** column.

Note: You can see the status for only the filings that you or your firm have submitted, not for all filings related to a case.

To filter information in the filings queue, perform the following steps:

1. Select **Filing History** from the **Actions** drop-down list.

   All relevant information concerning your filings is displayed on the *Filing History* page.

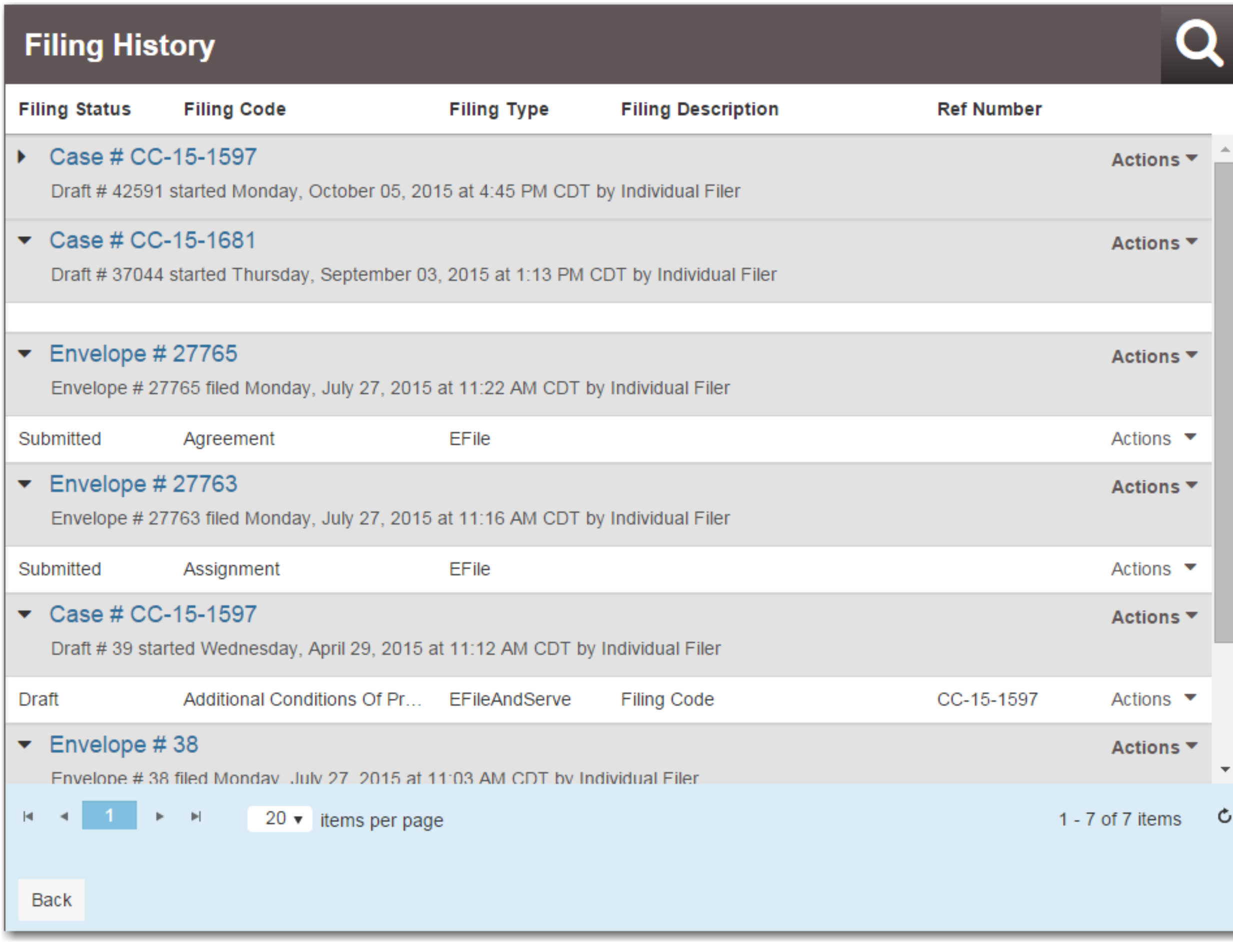


Figure 12.2 – Filing History Page

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

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

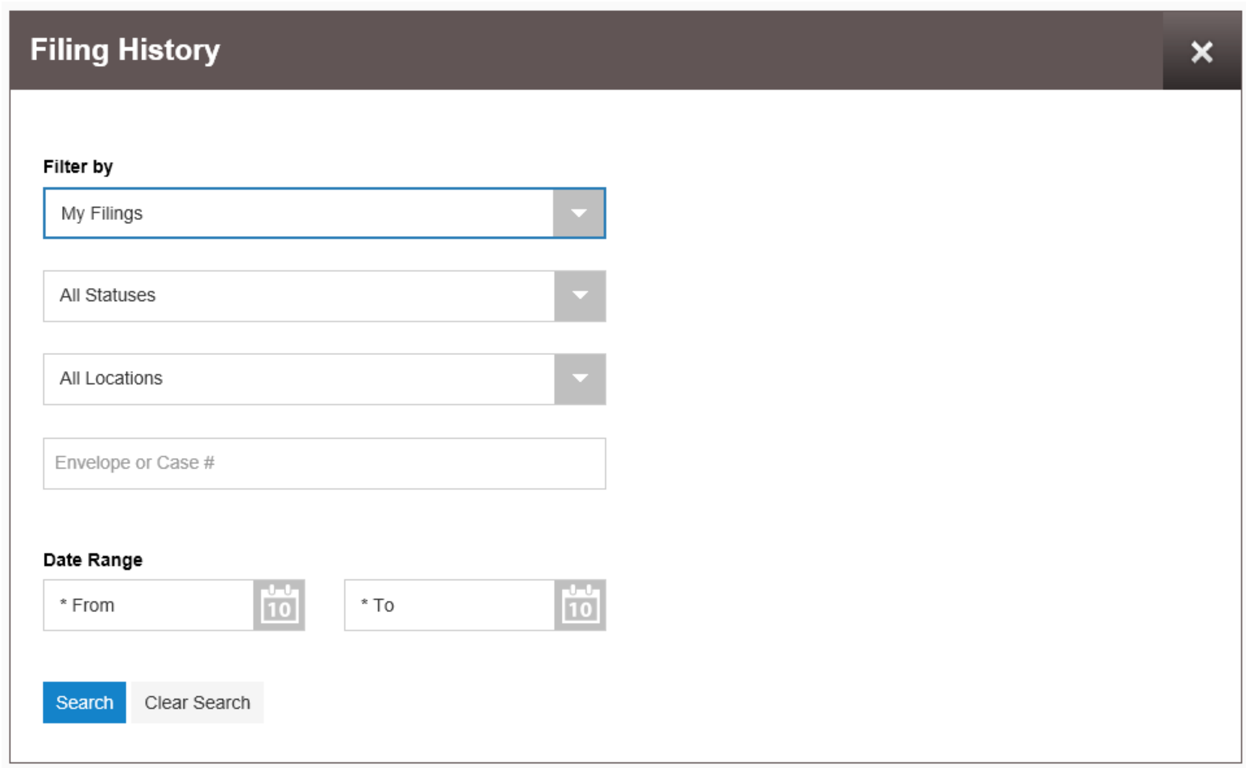


Figure 12.3 – Filing History Page for Filtering a Search

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

3. Enter more criteria to refine your search.

   a. In the **Filter by** field, select an option from the **My Filings** drop-down list.

Figure 12.4 – Filter by Drop-Down List

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

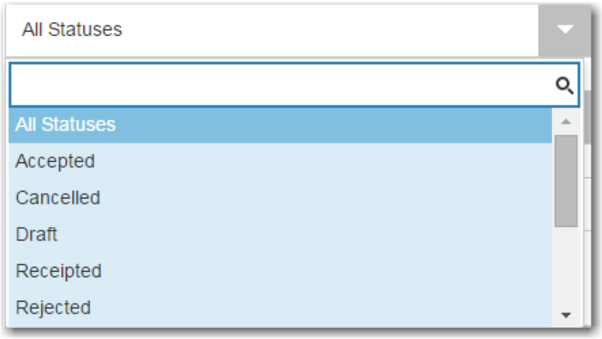


Figure 12.5 – All Statuses Drop-Down List

c. Select the location from the **All Locations** drop-down list.

d. If known, type the envelope or case number in the **Envelope or Case #** field.

e. In the **Date Range** field, select the dates for your search. For the **From** or the **To** date, click  to select dates from a calendar. Or, type the dates manually (for example, `7/15/2015`).

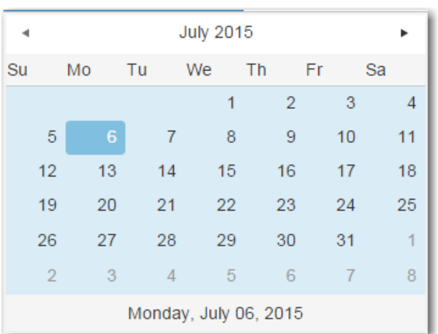


Figure 12.6 – Filter Date Calendar

4. Click 

   A list of cases meeting your search criteria is displayed.

Viewing the Envelope Details

From the *Filing History* page, you can see the information entered for the envelope, the filing details, and the documents submitted.

Perform the following steps to view the envelope details:

1. From the **Actions** drop-down list, select **Filing History**.

   The *Filing History* page opens.

   Note: The time stamp indicates the time and date that the filing was submitted. The time stamp corresponds to the time zone in which the filing occurred.

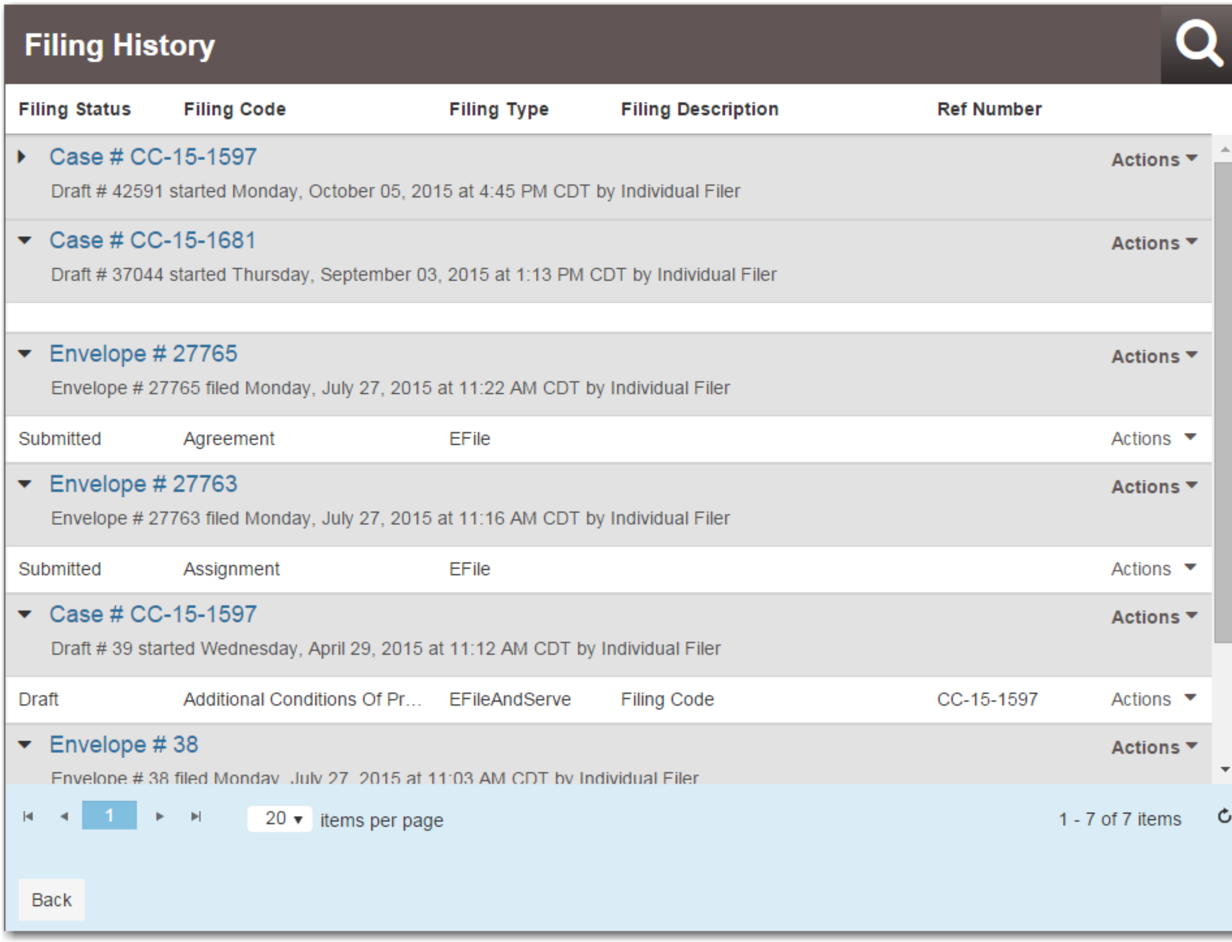


Figure 12.7 – Filing History Page

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

   The *Envelope* page opens.

   Note: Only fields that contain values are displayed in the filing details. Fields that contain no data are not displayed.

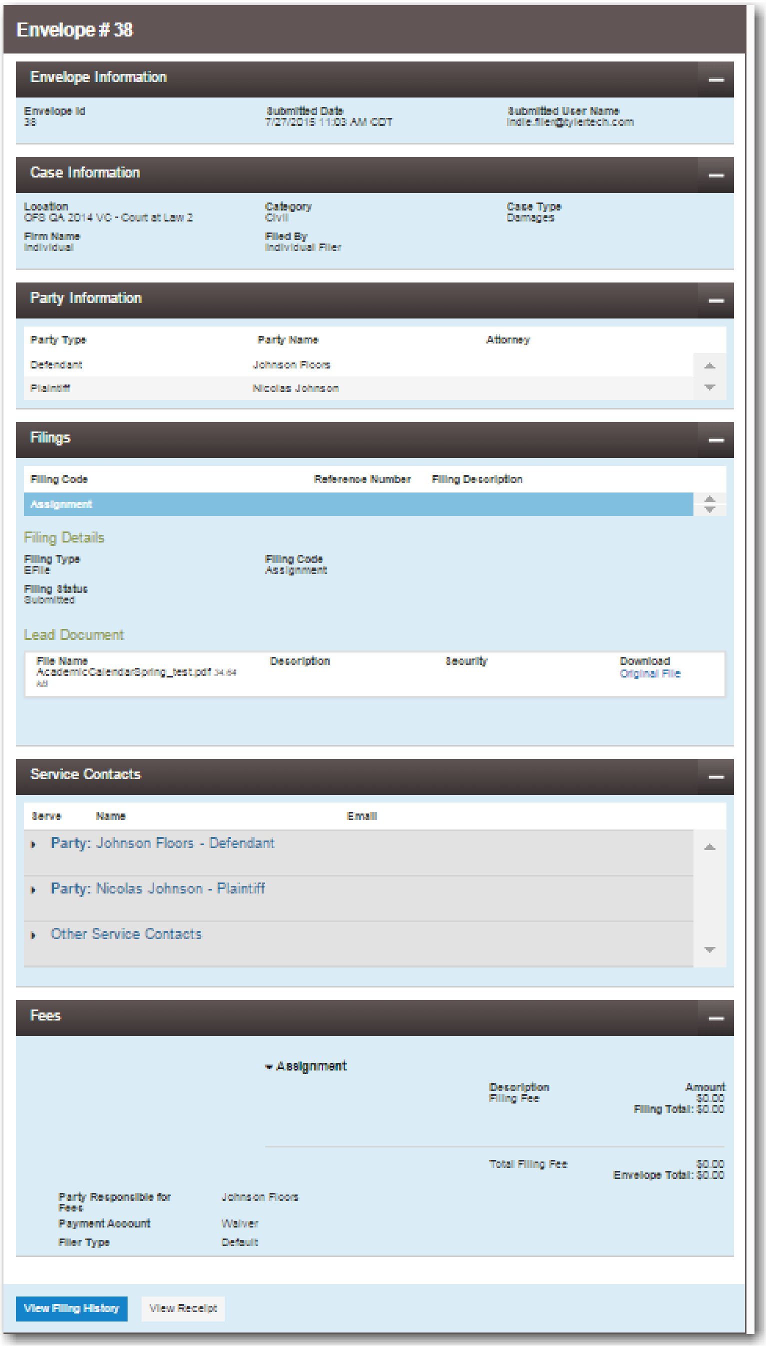


Figure 12.8 – Envelope # 38 Page

4. In the **Lead Document** section, click the link in the **Download** field to obtain a copy of the lead document.

Resuming the Filing Process

You can resume drafts after logging off from the system or exiting the filing process by accessing your case on the *Filing History* page.

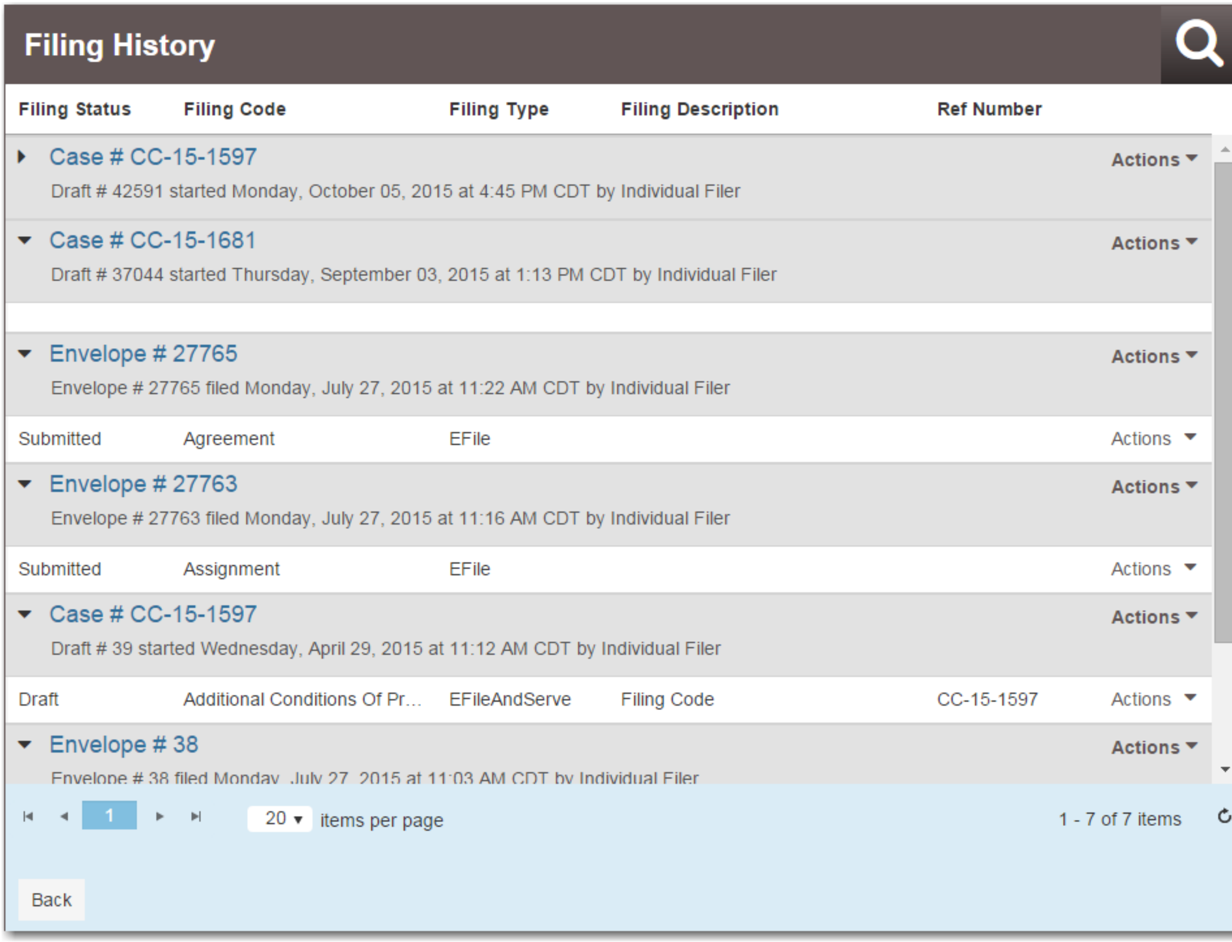


Figure 12.9 – Filing History Page

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

1. Select the draft on the *Filing History* page for which you want to resume a filing.
2. From the **Actions** drop-down list for the specified draft, select **Resume Draft Envelope**.

   The envelope opens at the location where you left off.
3. Continue completing the fields for this filing.

Canceling a Filing

You can cancel a filing that you submitted before it has been reviewed by the court.

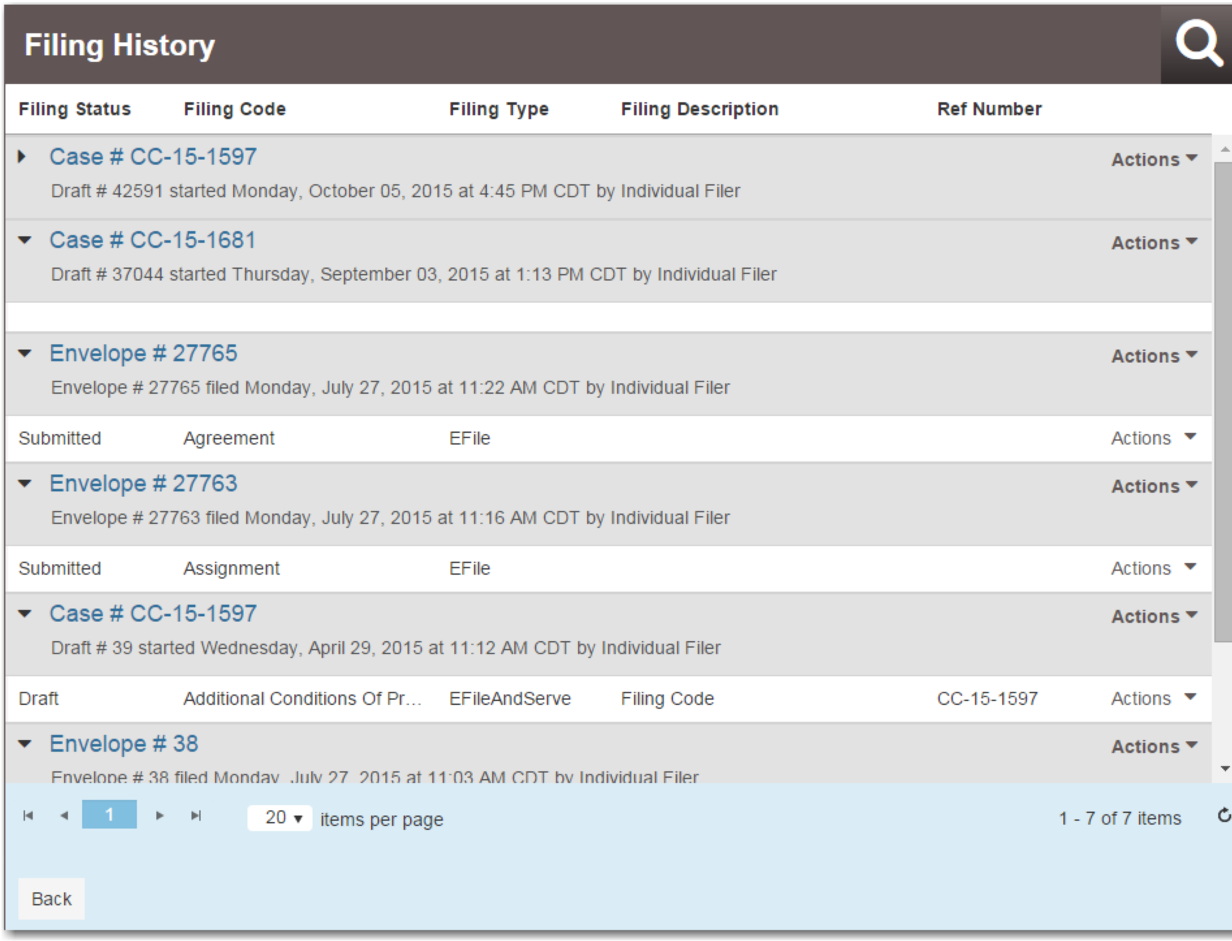


Figure 12.10 – Filing History Page

Perform the following steps to cancel the filing:

1. On the *Filing History* page, select the filing that you want to cancel.
2. From the case or envelope **Actions** drop-down list, select **Cancel**.

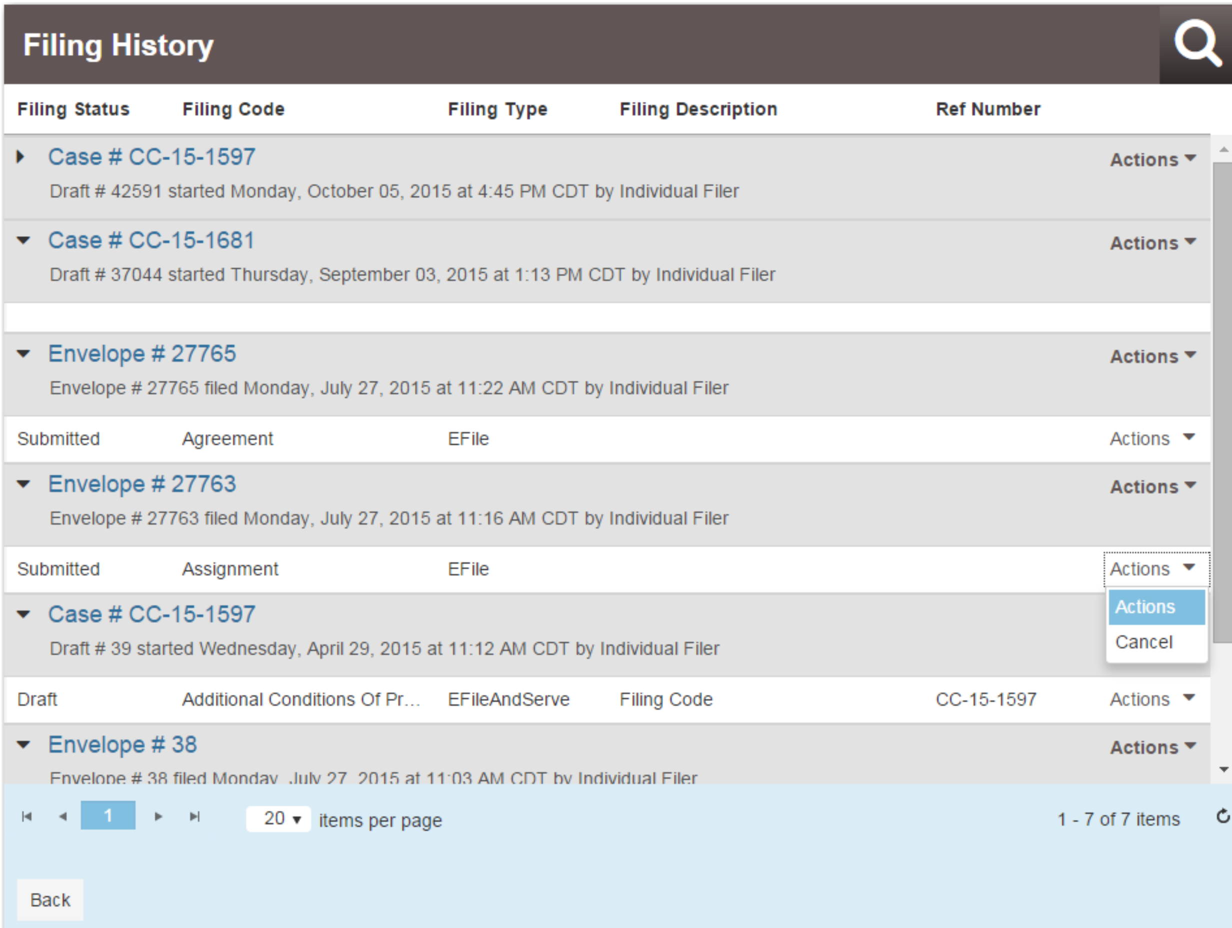


Figure 12.11 – Filing History Page – Canceling a Filing

Note: Ensure that you want to cancel the filing before you select Cancel. Once you perform the cancellation action, the filing is canceled immediately, and you cannot undo the action.

Chapter 13 Reports

Topics Covered in This Chapter

♦ Creating a Financial Reconciliation Report
♦ Creating a Filings Report

Creating a Financial Reconciliation Report

The Financial Reconciliation Report contains a report at the **Envelope** level that is designed to help filers reconcile their filing fees to their credit card statements.

To run a financial reconciliation report, perform the following steps:

1. From the **Actions** drop-down list, select **Reports**.

   The *Reports* page opens.

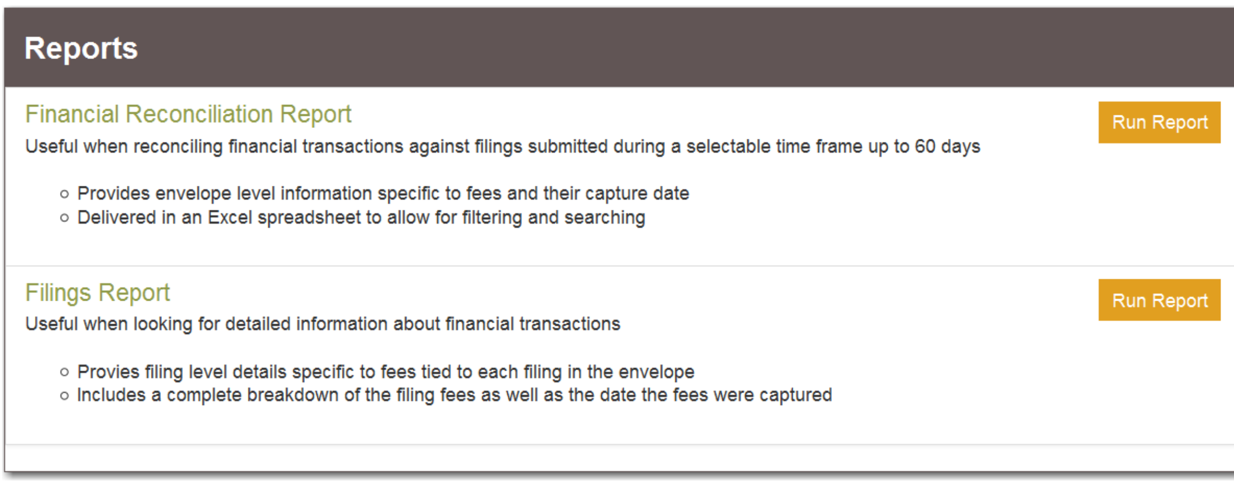


Figure 13.1 – Reports Page

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

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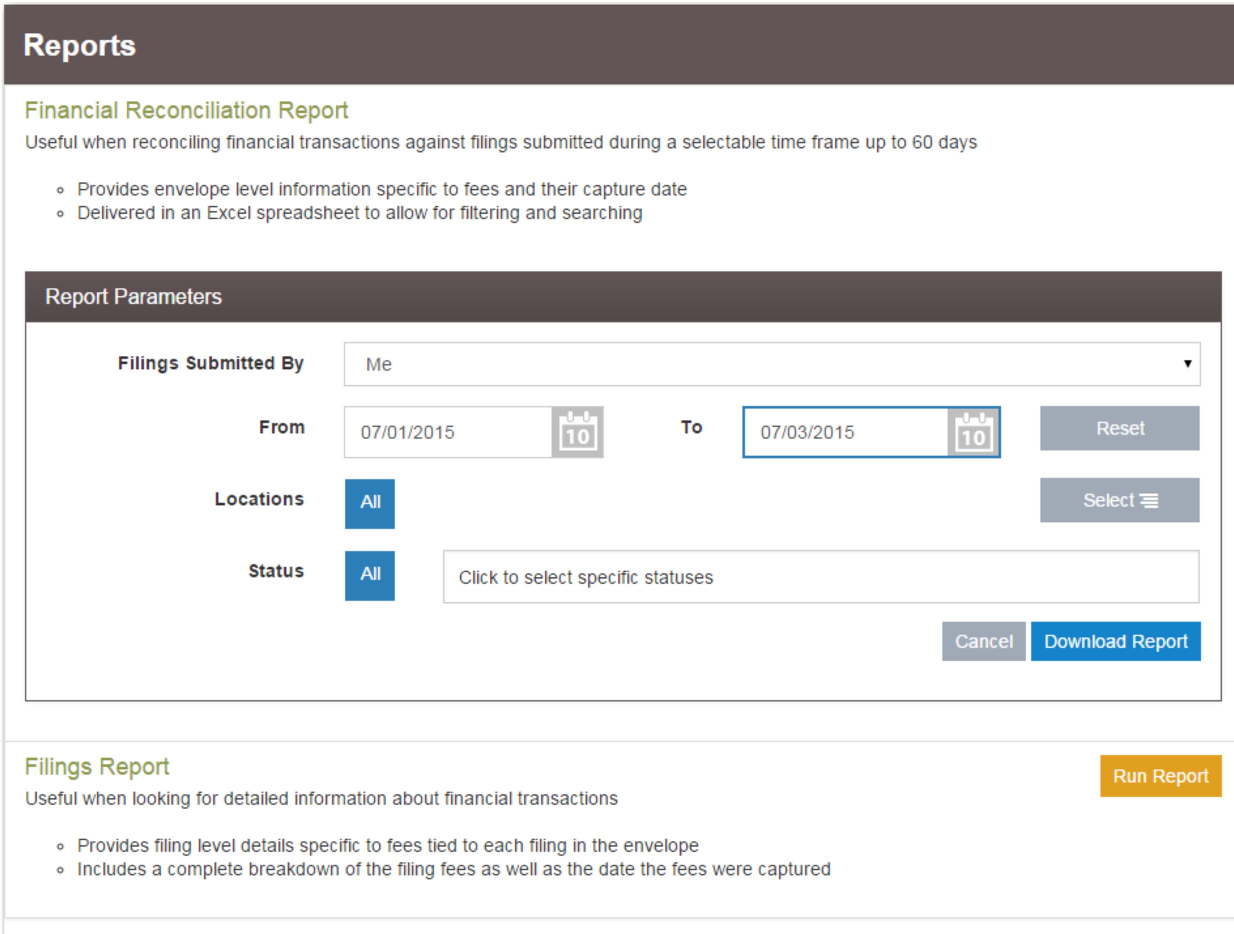

Figure 13.2 – Report Parameters Panel of Reports Page for Financial Reconciliation Report

3. In the **Report Parameters** panel, enter the report information in the fields provided:

   a. From the **Filings Submitted By** drop-down list, select either **Me** or **My Firm**.

   b. In the **From** and **To** date fields, click  to select the report date range from a calendar. Or, type the dates manually (for example, `7/31/2015`).

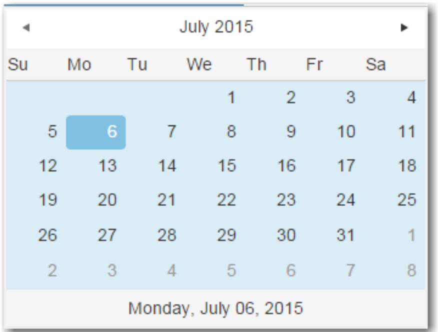

Figure 13.3 – Filter Date Calendar

c. In the **Locations** field, select **All** (default), or select one or multiple locations from the list.

d. In the **Status** field, select **All** (default), or select one or multiple statuses from the list.

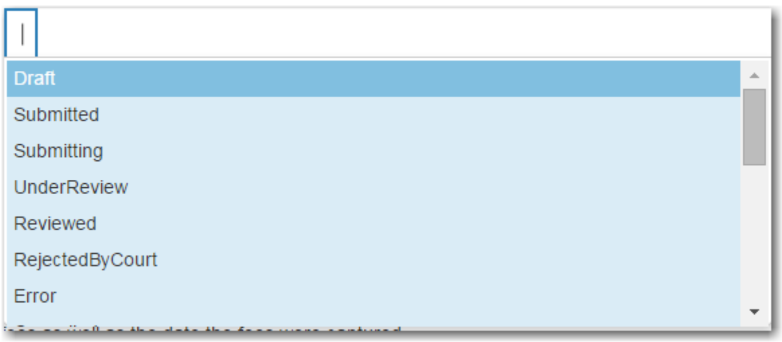

Figure 13.4 – Status Field Drop-Down List

4. Click 

to run the report, or click 

to cancel the action.
5. Open the report in Microsoft Excel, or save the report to another location.

Creating a Filings Report

The Filings Report is a detailed look into every filing, filing status, and fee associated with the filings you or your firm performed.

To create the Filings Report, perform the following steps:

1. From the **Actions** drop-down list, select **Reports**.

   The *Reports* page opens.

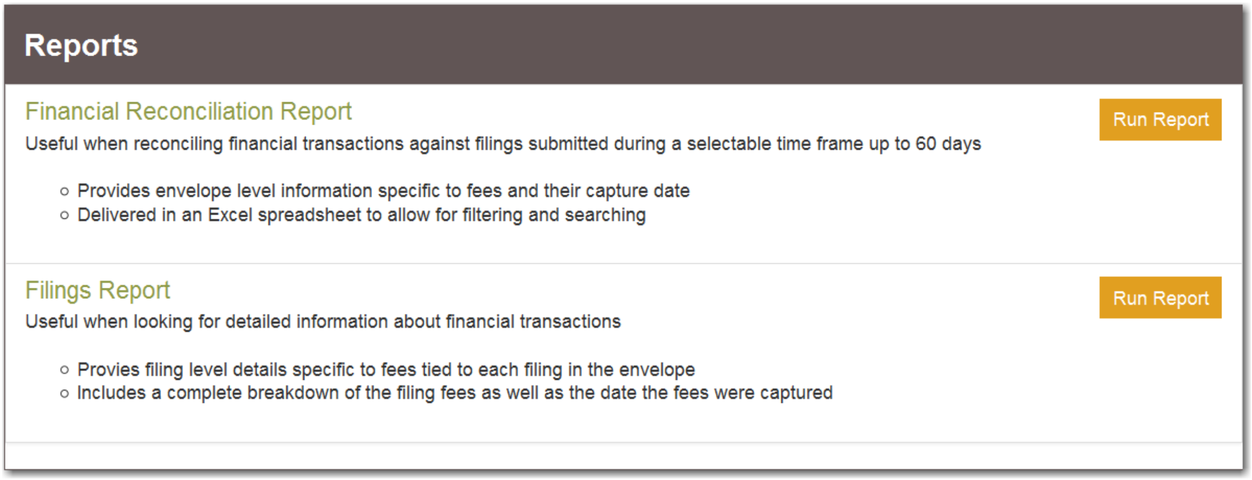

Figure 13.5 – Reports Page

2. In the **Filings Report** panel, click 

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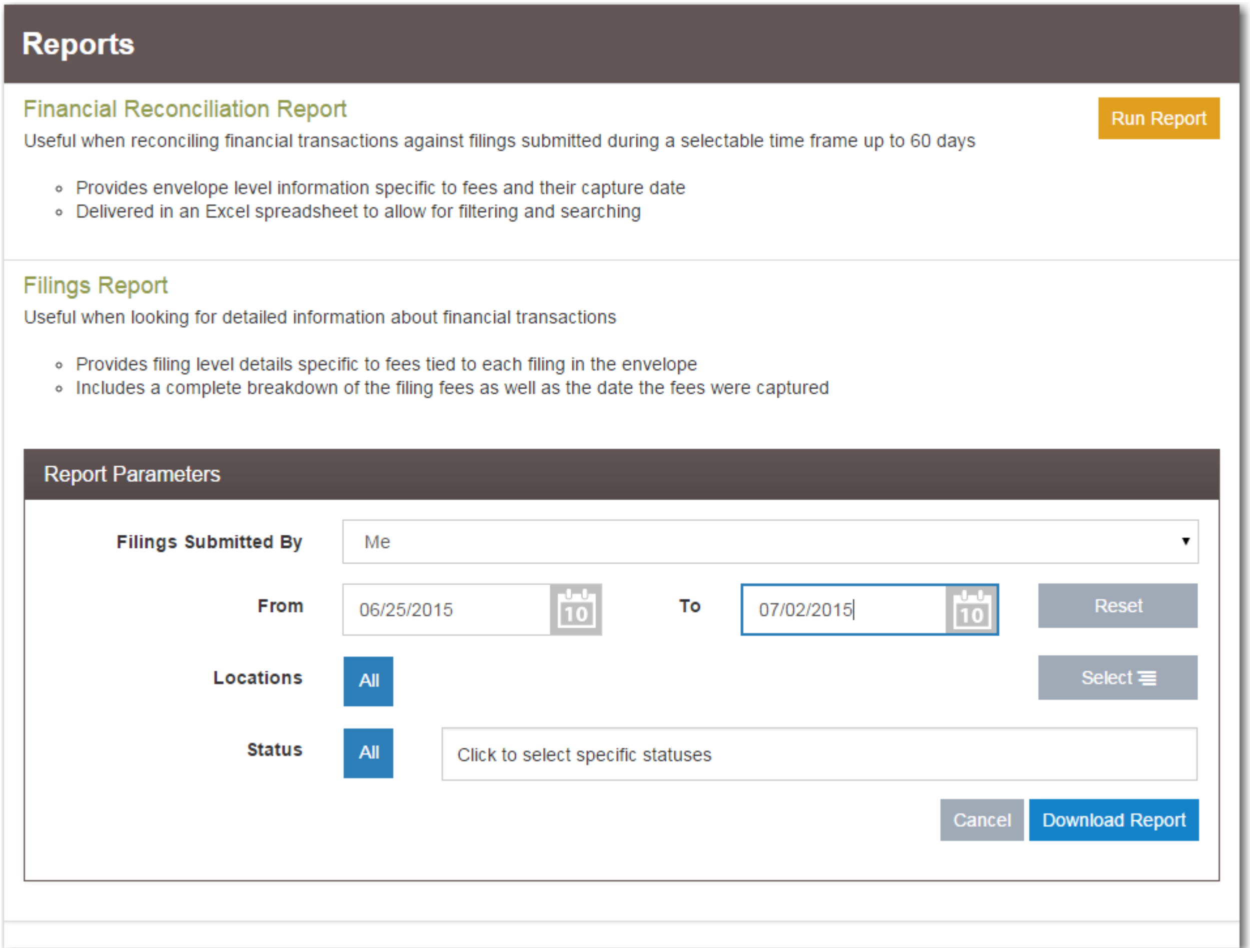


Figure 13.6 – Report Parameters Panel of Reports Page for Filings Report

3. In the **Report Parameters** panel, enter the report information in the fields provided:
   a. From the **Filings Submitted By** drop-down list, select either **Me** or **My Firm**.
   b. In the **From** and **To** date fields, click  to select the report date range from a calendar. Or, type the dates manually (for example, `7/31/2015`).

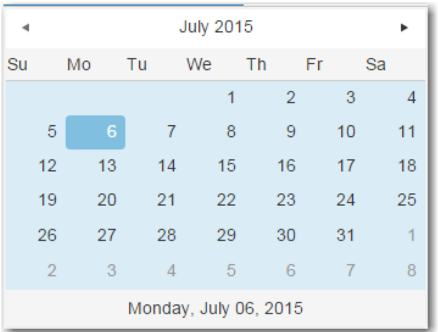


Figure 13.7 – Filter Date Calendar

c. In the **Locations** field, select **All** (default), or select one or multiple locations from the list.
d. In the **Status** field, select **All** (default), or select one or multiple statuses from the list.

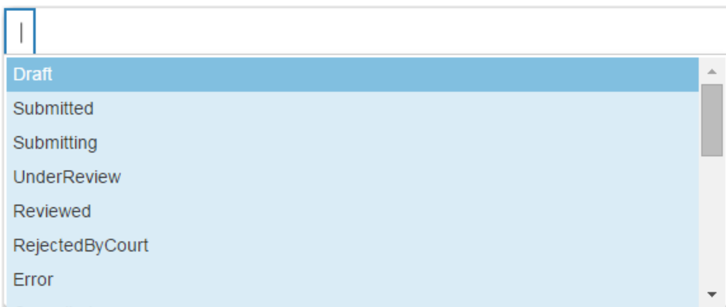
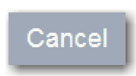


Figure 13.8 – Status Field Drop-Down List

4. Click  to run the report, or click  to cancel the action.
5. Open the report in Microsoft Excel, or save the report to another location.