



# **Firm Administrator User Guide**

## **Odyssey® File & Serve™ 2022.6, 2022.7, and 2022.8**

# Copyright and Confidentiality

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## Publishing History

Document Publication Number	Revision	Date	Changes Made
OFS-FS-220-4496 v.1	Initial	July 2019	Document Creation
OFS-FS-220-4496 v.2	Second	December 2019	The following changes were made: <ul style="list-style-type: none"><li>• Added sections for templates, bookmarks, and the Redaction feature.</li><li>• Added a procedure for non-indexed subsequent filing.</li><li>• Added a procedure for entering case information for a civil case.</li><li>• Added a procedure for entering case cross references to a filing.</li><li>• Added a procedure for entering a filing with a motion type code.</li><li>• Added a section for client support and feedback.</li><li>• Updated the description and screen shots of the Dashboard and the drop-down menu for filer actions.</li><li>• Updated screen shots throughout the document to reflect minor software changes.</li></ul>
OFS-FS-220-4496 v.3	Third	February 2020	The following changes were made: <ul style="list-style-type: none"><li>• Added a procedure for filing a new case with a Will Filed date.</li><li>• Added a procedure for entering the date of death on the <i>Parties</i> page.</li></ul>

Document Publication Number	Revision	Date	Changes Made
			<ul style="list-style-type: none"> <li>• Added a procedure for entering a filing with an Ad Damnum amount.</li> <li>• Added a procedure for entering a filing with a Claim Amount.</li> <li>• Added a procedure for entering a filing with an Estate Value.</li> <li>• Updated the <i>Parties</i> page.</li> <li>• Updated the procedure for entering a filing.</li> <li>• Updated the Redaction section.</li> <li>• Added a procedure for copying an envelope.</li> <li>• Updated the <i>Fees</i> page.</li> <li>• Updated the <i>Summary</i> page.</li> <li>• Updated the procedure for adding a new user to the firm.</li> <li>• Updated the <i>Firm Users</i> page screen shot.</li> </ul>
OFS-FS-220-4496 v.4	Fourth	April 2020	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Added the Return Date feature.</li> <li>• Added the Hearing Date feature.</li> <li>• Added a note throughout the document regarding the <b>Party Responsible for Fees</b> field.</li> </ul>
OFS-FS-220-4496 v.5	Fifth	June 2020	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Added the Reports feature.</li> <li>• Added the <b>Dashboard</b> button to the <i>Case Search</i> page.</li> </ul>
OFS-FS-220-4496 v.6	Sixth	September 2020	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Updated release number to match the current software release</li> <li>• Added browser support for Microsoft® Edge® to the</li> </ul>

Document Publication Number	Revision	Date	Changes Made
			<p>“System Requirements” section</p>
ESO-FS-220-4496 v.7	Seventh	December 2020	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Added a note to the envelope details section regarding newly-added parties for subsequent filings</li> <li>• Added a note in all existing case topics indicating that the <b>Add Party</b> button is configurable for subsequent filings</li> <li>• Added a new screen shot for the <i>File into Existing Case</i> window when the <b>Party Name</b> search option is not displayed. Information was added to the following topics: <ul style="list-style-type: none"> <li>– Orientation</li> <li>– Dashboard Page</li> <li>– Filing into an Existing Case from the Case Search Page</li> <li>– Filing into an Existing Case from the Dashboard Page</li> <li>– Filing into a Non-Indexed Case</li> </ul> </li> <li>• Added a section describing the new Zendesk Help icon</li> <li>• Changed the document numbering to reflect new standards</li> </ul>
ESO-FS-220-4496 v.8	Eighth	December 2020	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Updated the screen shot for the <i>Reports</i> page</li> <li>• Added the document security option to the “Creating a Service Only Filing” topic</li> </ul>
ESO-FS-220-4496 v.9	Ninth	February 2021	<p>The following changes were made:</p>



Document Publication Number	Revision	Date	Changes Made
			<ul style="list-style-type: none"> <li>• Added information regarding the new <i>Start Filing</i> page</li> <li>• Added information about the new Mail Service fees</li> <li>• Added information about tracking certified mail for a filing on the <i>Envelope Details</i> page</li> <li>• Updated the Service Contacts section to include information about the service method drop-down list on the <i>Service</i> page</li> <li>• Updated the “Creating a Service Only Filing” topic</li> <li>• Updated the “Filing into an Existing Case from the Dashboard Page” topic</li> </ul>
ESO-FS-220-4496 v.10	Tenth	March 2021	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Reordered chapters to better represent normal usage during a case filing</li> <li>• Updated the <i>Upload Documents</i> page to include all document types that are now supported for uploading</li> <li>• Added the case level address feature</li> <li>• Revised the “Viewing the Envelope Details” topic</li> <li>• Created separate topic for viewing mail service fees in the envelope details</li> </ul>
ESO-FS-220-4496 v.11	Eleventh	May 2021	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Added bulk filing to this release</li> <li>• Added the ability to add a service contact that is not associated with any party on the case to an initial filing</li> </ul>
ESO-FS-220-4496 v.12	Twelfth	July 2021	<p>The following changes were made:</p>

Document Publication Number	Revision	Date	Changes Made
			<ul style="list-style-type: none"> <li>• Added the vacation letter (or leave of absence) feature</li> <li>• Added the capability to collect additional data on the <i>Case Information</i> page. The data that is collected is then transferred to forms used in civil and family cases.</li> <li>• Added the Service of Process feature. The data that is collected is then transferred to forms used in civil and family cases.</li> <li>• Updated the case search sections to include the use of the ENTER button for case searches</li> </ul>
ESO-FS-220-4496 v.13	Thirteenth	October 2021	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• The <i>Fees</i> page has been updated to allow filers to create payment accounts on the <i>Fees</i> page during filing creation.</li> <li>• The <b>Documents</b> tab has been changed to the <b>Preload Documents</b> tab.</li> <li>• The Upload Documents pane on the <i>Filings</i> page has been changed to the Documents pane. The <b>Add Documents</b> button in the Documents pane has been changed to the <b>Select Documents</b> button.</li> <li>• The <i>Envelope Submitting</i> window has been added at the end of the filing process. After filers click the <b>Submit</b> button, the <i>Envelope Submitting</i> window is displayed with three options for the filer's next step. The options include the following: return to the <i>Dashboard</i> page, view the receipt, or start a new envelope.</li> </ul>
ESO-FS-220-4496 v.14	Fourteenth	November 2021	<p>The following changes were made:</p>

Document Publication Number	Revision	Date	Changes Made
			<ul style="list-style-type: none"> <li>• Added the ability to view service contact history</li> <li>• Added the ability to view the case judicial officer from specified pages in the application</li> <li>• Added the ability to search and filter specified drop-down menus</li> <li>• Updated the Support and Feedback sections</li> <li>• Added the ability to view the Return Date and Out of State indicator in the envelope details</li> </ul>
ESO-FS-220-4496 v.15	Fifteenth	November 2021	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Updated the “Redaction” chapter to include the addition of the transactional redaction feature</li> <li>• Updated the <i>Filings</i> page sections to include the required optional services feature</li> <li>• Added descriptions of the additional fields on the <i>Parties</i> page in the <b>Additional Identifiers</b> tab</li> <li>• Added a section for the new keyboard shortcuts, available through the <b>Help</b> drop-down list</li> <li>• Updated the “Support and Feedback” chapter to include the revised <b>Help</b> drop-down list</li> <li>• Added the “Manage Account” chapter</li> <li>• Revised “Changing the User Password” and moved the section to the “Manage Account” chapter</li> <li>• Added a description of the new <i>Profile</i> page</li> <li>• Added a description of the new <i>Email Notifications</i> page</li> </ul>

Document Publication Number	Revision	Date	Changes Made
			<ul style="list-style-type: none"> <li>• Revised the “Signing Out” section</li> <li>• Removed <b>Account Settings</b> from the Dashboard menu. Also removed the <b>Account Settings</b> description from the “Orientation” section.</li> <li>• Added a chapter to describe how to access re: Search from Odyssey File &amp; Serve</li> </ul>
ESO-FS-220-4496 v.16	Sixteenth	December 2021	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Removed the <i>Preload Documents</i> page and replaced all screen shots where the <b>Preload Documents</b> tab was previously displayed</li> <li>• Replaced the <i>Start Filing</i> page throughout the document, reflecting the removal of the <b>Location</b> drop-down list</li> <li>• On the <i>Filings</i> page, changed the Documents pane to the Upload Documents pane. Also changed “Component” to “Type” in the Upload Documents pane headers</li> <li>• Replaced screen shots to reflect the new page headers for the following pages: <ul style="list-style-type: none"> <li>– Firm Users</li> <li>– Attorneys</li> <li>– Payment Accounts</li> <li>– Firm Details</li> <li>– Change Password</li> <li>– Profile</li> <li>– Email Notifications</li> </ul> </li> <li>• Reordered some of the sections in the “Case Information” chapter</li> </ul>

Document Publication Number	Revision	Date	Changes Made
			<ul style="list-style-type: none"> <li>• Removed the “Uploading Documents for a New Case Filing” section</li> <li>• Removed the “Uploading Documents for a Bulk Filing” section</li> <li>• Removed the Unused Documents message from the <i>Summary</i> page</li> </ul>
ESO-FS-220-4496 v.17	Seventeenth	January 2022	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Changed the <i>Start Filing</i> page throughout the document</li> <li>• Added information on creating draw-down accounts</li> <li>• Updated the “Payment Accounts” chapter to reflect the change to the payment account pane for adding new payment accounts</li> <li>• Added draw-down accounts to the account types listed for creating new payment accounts on the <i>Fees</i> page</li> <li>• Added a topic describing how to reset a firm user’s password</li> <li>• Added envelope-level information to the <i>Case Information</i> page, the <i>Summary</i> page, and the envelope details</li> <li>• Updated the “File into an Existing Case” chapter</li> <li>• Removed the topic “Filing into an Existing Case from the Case Search Page” and included the information in other topics</li> <li>• Updated screen shots throughout the document to reflect the addition of the <b>Filter</b> option on the following pages: <ul style="list-style-type: none"> <li>– Attorneys</li> <li>– Users</li> </ul> </li> </ul>

Document Publication Number	Revision	Date	Changes Made
			<ul style="list-style-type: none"> <li>– Templates</li> <li>• Updated screen shots in the specified chapters to reflect the changes to the following buttons:               <ul style="list-style-type: none"> <li>– Add Attorney</li> <li>– Add Payment Account</li> <li>– Add User</li> </ul> </li> <li>• Changed the example screen shot of the public service contacts list to show the addition of the firm name associated with each service contact</li> </ul>
ESO-FS-220-4496 v.18	Eighteenth	June 2022	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Updated all screen shots to reflect the new user interface</li> <li>• Revised steps in applicable sections to reflect changes to the filing flow</li> <li>• Added information about adding the current filer as a service contact in a case filing</li> <li>• Added information on the Merge Document feature</li> <li>• Added a note to the topic “Removing a User from the Firm” stating that signed-in users cannot delete themselves from the firm list</li> </ul>

Document Publication Number	Revision	Date	Changes Made
ESO-FS-220-4496 v.19	Nineteenth	September 2022	<p>The following changes were made:</p> <ul style="list-style-type: none"> <li>• Throughout the document, updated the screen shots of the Dashboard</li> <li>• Throughout the document, updated the screen shots of the <i>Dashboard</i> page</li> <li>• Throughout the document, updated the screen shots of the <i>Start Filing</i> page</li> <li>• Throughout the document, updated the screen shots of the <i>Filing History</i> page</li> <li>• Throughout the document, updated the screen shots of the <i>Filing Drafts</i> page</li> <li>• Throughout the document, updated several screen shots of the <i>Envelope Details</i> page</li> <li>• Updated the “Keyboard Shortcuts” topic</li> <li>• Updated the “Drop-Down Lists” topic</li> <li>• Updated the “Orientation” topic</li> <li>• Added the topic “Message to Users Who Have Not Activated Their Accounts”</li> <li>• Updated the “Updating Firm Information” topic</li> <li>• Updated the “Manage Account” chapter</li> <li>• Updated the “Dashboard” chapter</li> <li>• Updated all topics in the “Firm Administrator Functions” chapter</li> <li>• Updated the “Payment Accounts” chapter</li> <li>• Updated the example screen shot of the <i>Edit Party Details</i> page</li> <li>• Updated the “Merging Documents for File Upload in a Case Filing” topic</li> </ul>

Document Publication Number	Revision	Date	Changes Made
			<ul style="list-style-type: none"> <li>• Updated several screen shots in the “View Case Judicial Officer” topic</li> <li>• Updated the “Redaction Feature” chapter. Removed topics that no longer apply.</li> <li>• Updated the “File into an Existing Case” chapter</li> <li>• Updated the “Access re: Search®” chapter</li> <li>• Updated the “Service Contacts” chapter</li> <li>• Updated the screen shots in the “Templates” chapter</li> <li>• Updated the “Filings” chapter</li> <li>• Updated the “Bookmarks” chapter</li> <li>• Updated the “Bulk Filing” chapter</li> <li>• Updated the “Vacation Letter (or Leave of Absence)” chapter</li> <li>• Updated the “Reports” chapter</li> <li>• Updated the “Support and Feedback” chapter</li> </ul>



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## About This Guide

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

User guides may include the following elements:

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

### Audience

This document is intended for the following personas:

- Clients
- Tyler Client Services





### Documentation Conventions

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

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

## Documentation Notes

Each documentation note provides information or action items regarding that area of the document.

Icon	Note Type	Description
	<b>Note</b>	Notes provide extra details about a topic or step.
	<b>Caution</b>	Caution messages indicate that a specific action could cause an error in the system.
	<b>Warning</b>	Warning messages indicate that a specific action could cause an interruption of service.
	<b>Danger</b>	Danger messages indicate that a specific action could damage the database infrastructure or hardware.



# 1 System Overview

## Topics covered in this chapter

- ◆ Capabilities
- ◆ Release 2022.6, 2022.7, and 2022.8 Enhancements

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

## Capabilities

The File & Serve functionality allows filers to do the following:

- Create and submit filings at any time
- Check the status of draft filings, as well as filings that are stored in the filing history
- Search for a case that was previously submitted
- File into an existing case to create a subsequent filing
- Bookmark a case to return to it at a later time
- Create and save a template that you can use to quickly create future filings
- Create and store payment accounts for use in your future filings
- Create and manage service contacts for use in your future filings
- Generate reports for a specified time frame and export them to a Microsoft Excel file, which you can then download

## Release 2022.6, 2022.7, and 2022.8 Enhancements

The following enhancements have been made to File & Serve for Release 2022.6, 2022.7, and 2022.8.

Feature/Update	Description/Location in Document
The names of some items on the Dashboard have been changed.	Throughout the document, all screen shots of the Dashboard have been replaced.
The screen shots of the <i>Dashboard</i> page have been updated.	Throughout the document, all screen shots of the <i>Dashboard</i> page have been replaced.
The <i>Start Filing</i> page has been changed.	Throughout the document, all screen shots of the <i>Start Filing</i> page have been replaced.
The <i>Filing History</i> page has been redesigned for an improved filer experience. A new filter has been added to the page.	Throughout the document, all screen shots of the <i>Filing History</i> page have been replaced.

Feature/Update	Description/Location in Document
The <i>Filing Drafts</i> page has been redesigned for an improved filer experience. A new filter has been added to the page.	Throughout the document, all screen shots of the <i>Filing Drafts</i> page have been replaced.
The <i>Envelope Details</i> page has been redesigned for an improved filer experience.	Throughout the document, several screen shots of the <i>Envelope Details</i> page have been replaced.
The keyboard shortcuts option has been added to the <b>Support</b> drop-down list. The <i>Keyboard Shortcuts</i> window also has been updated.	<a href="#">Keyboard Shortcuts, page 5</a>
The <i>Case Search</i> page has been changed to the <i>Search for Case</i> page. The name of the page has been updated in this topic.	<a href="#">Drop-Down Lists, page 6</a>
The screen shots in the “Orientation” topic have been updated.	<a href="#">Orientation, page 7</a>
Information regarding messages that users receive if they have not activated their accounts has been added.	<a href="#">Message to Users Who Have Not Activated Their Accounts, page 23</a>
The steps to follow to update the firm’s information have been changed. The <i>Edit Firm Details</i> window has been added to the process.	<a href="#">Updating Firm Information, page 25</a>
The “Manage Account” chapter has been updated with new screen shots and revised steps, as applicable.	<a href="#">Manage Account, page 29</a>
The “Dashboard” chapter has been updated with new screen shots and revised steps, as applicable.	<a href="#">Dashboard, page 34</a>
The “Firm Administrator Functions” chapter has been updated with new screen shots and revised steps, as applicable.	<a href="#">Firm Administrator Functions, page 43</a>
The “Payment Accounts” chapter has been updated with new screen shots and revised steps, as applicable.	<a href="#">Payment Accounts, page 56</a>
The screen shot for the <i>Edit Party Details</i> page has been updated.	<a href="#">Entering Party Details, page 85</a>
The <b>Merge Document</b> feature has been updated.	<a href="#">Merging Documents for File Upload in a Case Filing, page 92</a>
Several screen shots in the “View Case Judicial Officer” topic have been updated.	<a href="#">View Case Judicial Officer, page 125</a>
<p>The “Redaction Feature” chapter has been updated. The following topics were removed as the information contained in them was no longer applicable to the current <i>Content Manager</i> window:</p> <ul style="list-style-type: none"> <li>• Deleting a Redaction</li> <li>• Working with an Existing Redaction</li> <li>• Redaction Editor Toolbar</li> </ul>	<a href="#">Redaction Feature, page 152</a>

Feature/Update	Description/Location in Document
The “File into an Existing Case” chapter has been updated with new screen shots and revised steps, as applicable.	<a href="#">File into an Existing Case, page 155</a>
The “Access re:Search®” chapter has been updated with new screen shots and updated information.	<a href="#">Access re:Search®, page 168</a>
The “Service Contacts” chapter has been updated with new screen shots and revised steps, as applicable.	<a href="#">Service Contacts, page 171</a>
The “Templates” chapter has been updated with new screen shots and revised steps, as applicable.	<a href="#">Templates, page 195</a>
The “Filings” chapter has been updated with new screen shots and revised steps, as applicable.	<a href="#">Filings, page 204</a>
The “Bookmarks” chapter has been updated with new screen shots and revised steps, as applicable.	<a href="#">Bookmarks, page 223</a>
The bulk filing process has been revised. The screen shots and steps have been updated to reflect the new bulk filing process.	<a href="#">Bulk Filing, page 227</a>
The vacation letter (or leave of absence) process has been revised. The screen shots and steps have been updated to reflect the new vacation letter (or leave of absence) process.	<a href="#">Vacation Letter (or Leave of Absence), page 269</a>
The “Reports” chapter has been updated with new screen shots and revised steps, as applicable.	<a href="#">Reports, page 279</a>
The “Support and Feedback” chapter has been updated with new screen shots and revised steps, as applicable.	<a href="#">Support and Feedback, page 283</a>

# 2 Before You Begin

## Topics covered in this chapter

- ◆ System Requirements and Recommendations
- ◆ Page Navigation
- ◆ Keyboard Shortcuts
- ◆ Drop-Down Lists
- ◆ Error Messages
- ◆ Orientation

This guide is intended for Firm Administrators and Criminal Filing Firm Administrators.

**Note: To obtain the Criminal Filing Firm Administrator role, contact Tyler Support.**

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

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

## System Requirements and Recommendations

The system requirements and recommendations are as follows:

- Browser Requirements—The system supports Chrome™; Mozilla® Firefox®; Microsoft® Edge®; or Safari® application programs. If your browser does not meet these minimum requirements, please contact your network administrator.

**Note: Internet Explorer® is not a supported browser and may not work as expected.**

- Operating Systems—The system supports Microsoft® Windows®, Linux®, Chrome OS™, Android™, iOS, and OS X® desktop class operating system software.
- Minimum Hardware Requirements—The system supports the following hardware:
  - Intel® Core™ Duo processors or Advanced Micro Devices, Inc. (AMD) processors manufactured in 2012 or later
  - 2 gigabytes (GB) of random-access memory (RAM)
  - 1366 x 768 resolution screens for desktop computers, or 1280 x 720 resolution screens for mobile devices
- Recommended Hardware—Tyler recommends the following hardware:
  - Intel® Core™ i3 or AMD A6 processors with at least a 2.0 GHz clock speed
  - 4 GB of RAM
  - 1920 x 1080 resolution for both desktop computers and mobile devices
- Connection Recommendation—A high-speed Internet connection is recommended.
- Document Format—The following document formats are supported:
  - Adobe® PDF
  - Adobe TIFF



- Microsoft Windows Media Video (WMV)
- Microsoft Word (DOCX, DOC)
- MPEG (MPG)
- WordPerfect® (WPD)
- XML

## Page Navigation

This section describes how to navigate through File & Serve and populate data fields throughout the filing process.

### Using the Mouse

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


### Using the Keyboard

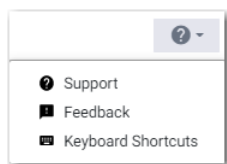
As you complete the pages for your filing, you can navigate from one field to the next by pressing TAB. When you have completed the required fields on a specified page, you can save your entries and move to the next page by pressing TAB after the last field.

## Keyboard Shortcuts

You can access the keyboard shortcuts from the **Support** drop-down list.

To access keyboard shortcuts:

1. Click  in the File & Serve header.  
The **Support** drop-down list is displayed.



**Figure 2.1 – Support Drop-Down List**

2. Click **Keyboard Shortcuts**.  
The *Keyboard Shortcuts* window is displayed.

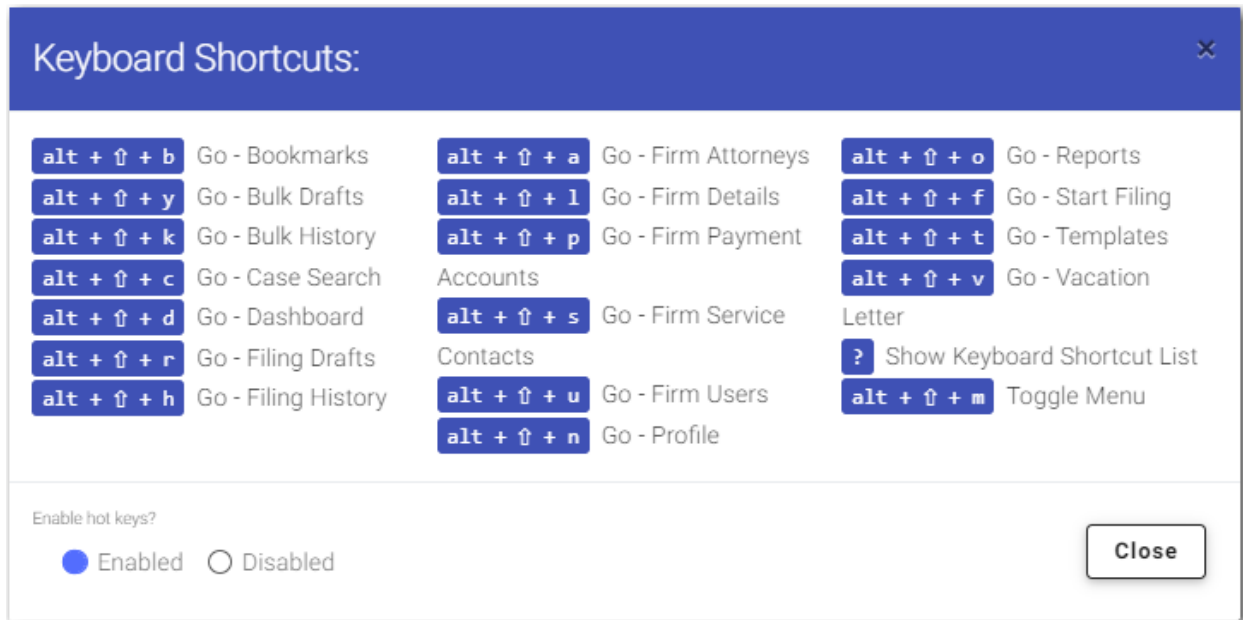


Figure 2.2 – Example of a Keyboard Shortcuts Window

3. Select the option that you want. You can enable or disable hot keys.

## Drop-Down Lists

The application allows you to search and filter various drop-down lists to quickly find the selection that you want.

The search function allows you to type the name of the item that you want to locate in the search field. The search function can be used in the following drop-down lists:

- **Court Location** field on the *Case Information* page
- **Location** field on the *Search for Case* page
- **Case Category** field
- **Case Type** field
- **Party Type** field
- **Filing Code** field
- **Payment Account** field on the *Fees* page
- **Filing Attorney** field on the *Fees* page

**Note:** The **Filing Attorney** field may not be available for some users.

# Error Messages

File & Serve displays several error messages to alert you when you have not entered required information or you have entered invalid information.

## Enter Data in Required Fields

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

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

# Orientation

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

## Dashboard Page

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

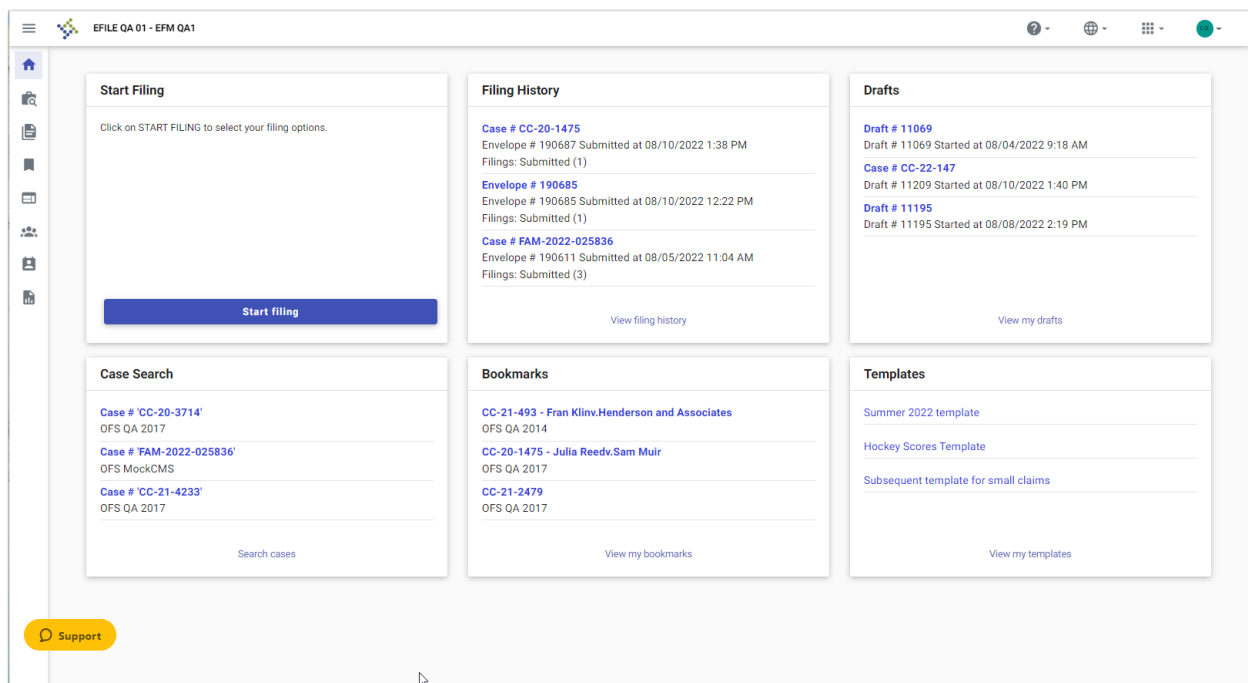



Figure 2.3 – Example of a Dashboard Page

## Case Search

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



### Search for Case

If you are not sure your case number is correct, refer to the formatting instructions for the selected court or search for the case by party name.

Location\*  
Select... ▼

Search for Case by

Case Number  Party Name

If you are not sure your case number is correct, refer to the formatting instructions for the selected court.

Case Number\*

Sort results by

Newest to Oldest ▼

Figure 2.4 – Search for Case Page

**Note:** Your system may be configured to search only by case number. With this optional configuration, the Party Name option is not displayed.

### Filing History

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

The screenshot displays the 'Filing History' page in a web application. The page title is 'EFILE QA 01 - EFM QA1'. The main content area shows a list of filings, sorted by 'Newest to Oldest'. There are 162 results in total. The list includes the following entries:

- Case # CC-20-1475**: Submitted Aug 10, 2022 6:38:50 PM. Filing Status: Submitted. Filing Code: Application. Filing Type: eFile Only. Filing Description: (blank). Client Ref #: (blank). Submitted by: Lauren Groswald.
- Case # CC-22-147**: Submitted Aug 10, 2022 5:23:10 PM. Filing Status: Accepted. Filing Code: Action - Initial Only. Filing Type: eFile and Serve. Filing Description: (blank). Client Ref #: (blank). Submitted by: Lauren Groswald, Filing Attorney Jack Stone.
- Envelope # 190634**: Submitted Aug 5, 2022 5:32:48 PM. Filing Status: Submitted. Filing Code: Complaint for Repossession of Rent. Filing Type: eFile Only. Filing Description: Landlord / Tenant Case Filing. Client Ref #: 1. Submitted by: Lauren Groswald, Filing Attorney Abby Carmichael.
- Case # FAM-2022-025836**: Submitted Aug 5, 2022 4:04:42 PM. Filing Status: (blank). Filing Code: (blank). Filing Type: (blank). Filing Description: (blank). Client Ref #: (blank). Submitted by: Lauren Groswald, Filing Attorney Abby Carmichael.

The left sidebar contains a 'Filing Drafts' section. A 'Support' button is located at the bottom left of the page.

Figure 2.5 – Example of a Filing History Page

## Filing Drafts

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

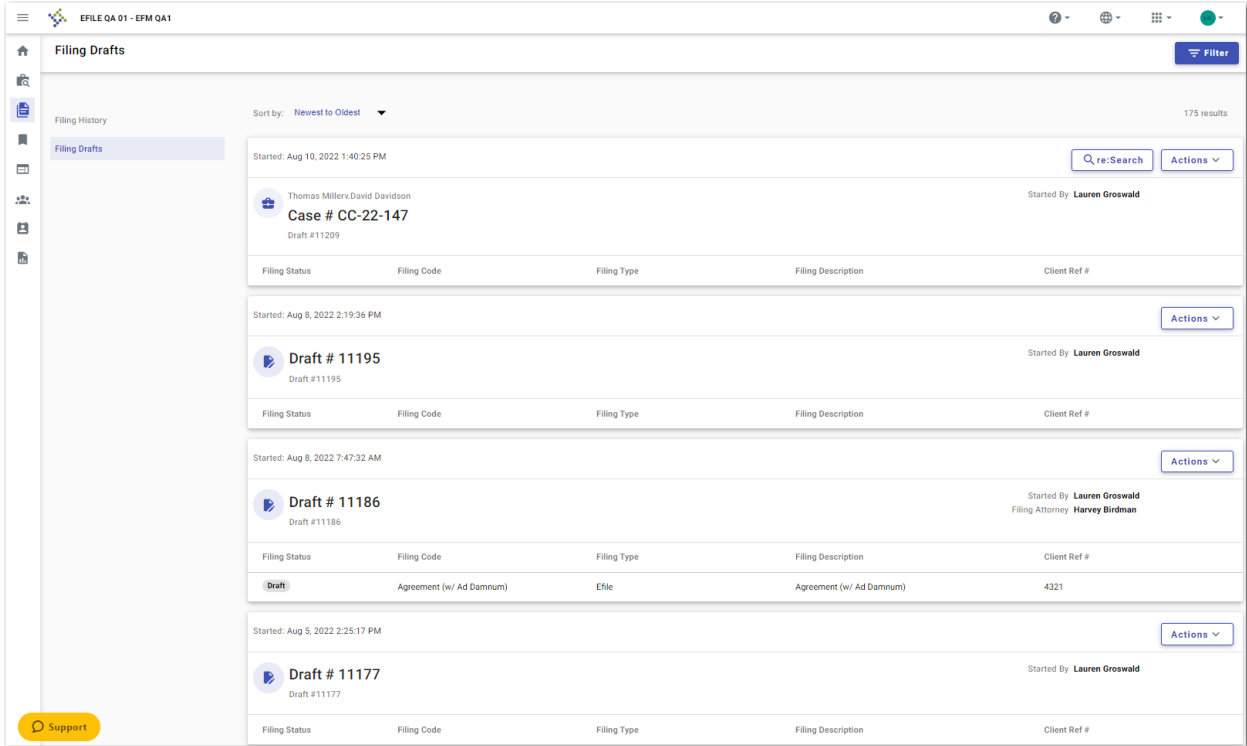


Figure 2.6 – Example of a Filing Drafts Page

### Bookmarks

On the Dashboard menu, click **Bookmarks**. From here, you can access the cases that you have bookmarked. You can file into an existing case, view the service contacts attached to the case, file into the case with a template, or remove the bookmark from the case.

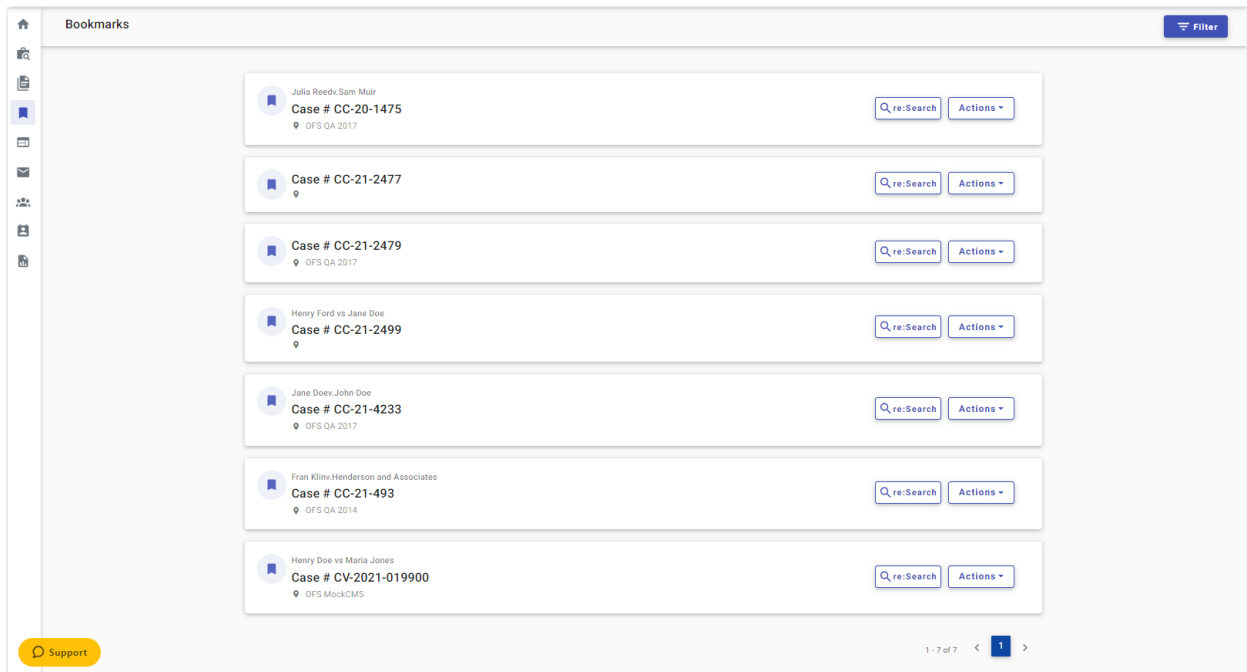


Figure 2.7 – Example of a Bookmarks Page

## Templates

On the Dashboard menu, click **Templates**. From here, you can access the templates that you previously created. You can create a new case filing, edit an existing template, copy a template, or delete a template.

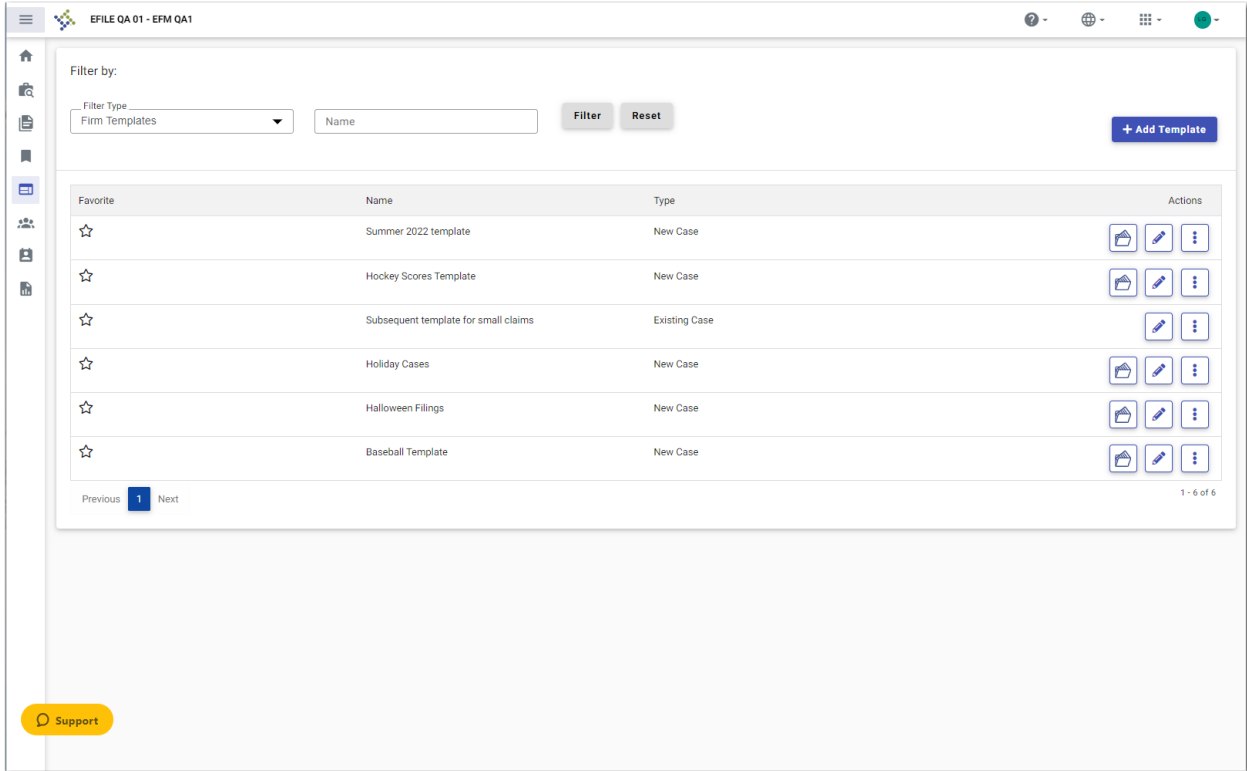


Figure 2.8 – Example of a Templates Page

### Firm Users

On the Dashboard menu, click **Firm Users**. From here, you can view a list of your firm users, add a new firm user, edit the information for an existing firm user, or remove that user from your firm. You can also change the role that you previously assigned to that firm user. You can assign the role of Firm Administrator to a specified user (or to specified users), and you can remove the role of Firm Administrator from a user to whom you previously assigned the role.



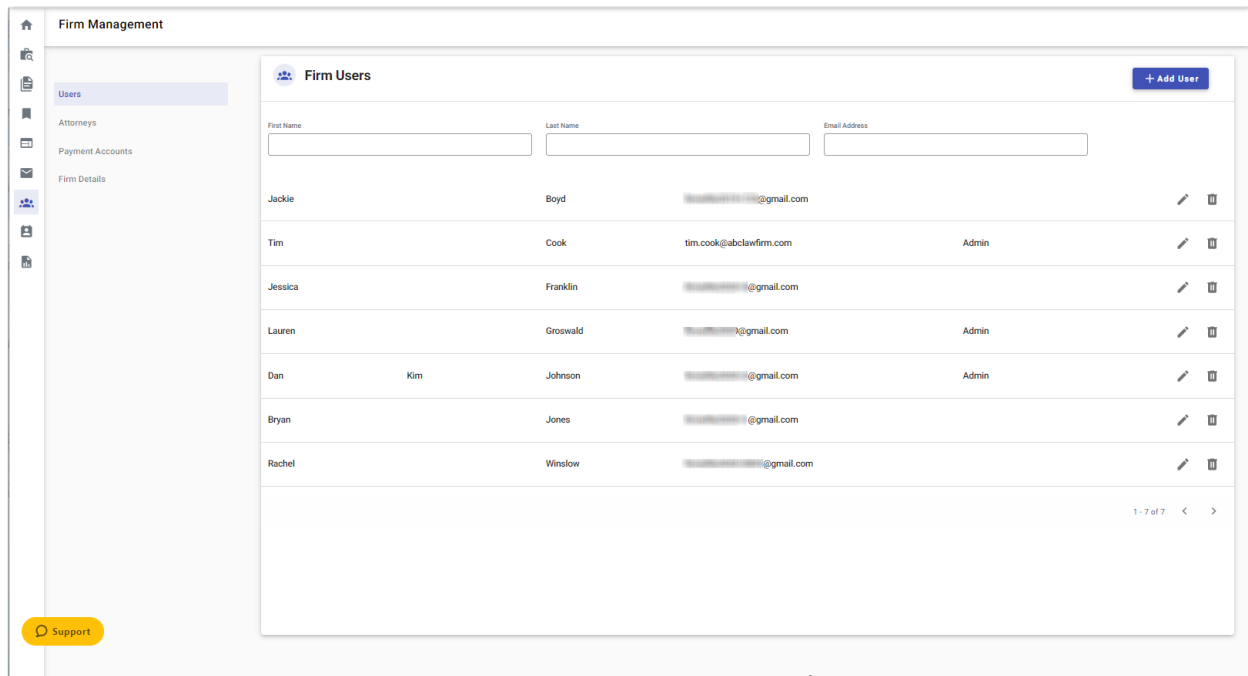


Figure 2.9 – Example of a Firm Users Page

### Firm Attorneys

On the Dashboard menu, click **Firm Attorneys**. From here, you view the attorney list for your firm, add a new attorney to your firm, edit the information for an existing attorney, or remove an attorney from your firm's list.

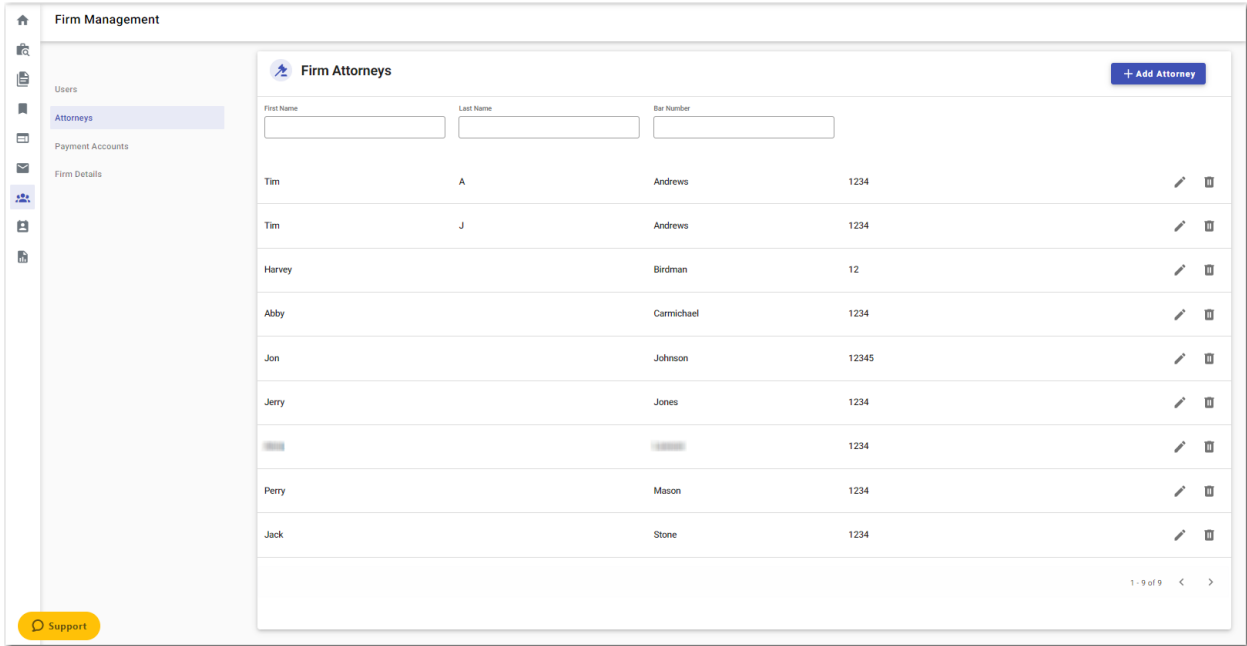


Figure 2.10 – Example of a Firm Attorneys Page

### Firm Payment Accounts

On the Dashboard menu, click **Firm Payment Accounts**. From here, you can view the payment accounts for your firm, add a new payment account, edit an existing account, or delete an existing account.

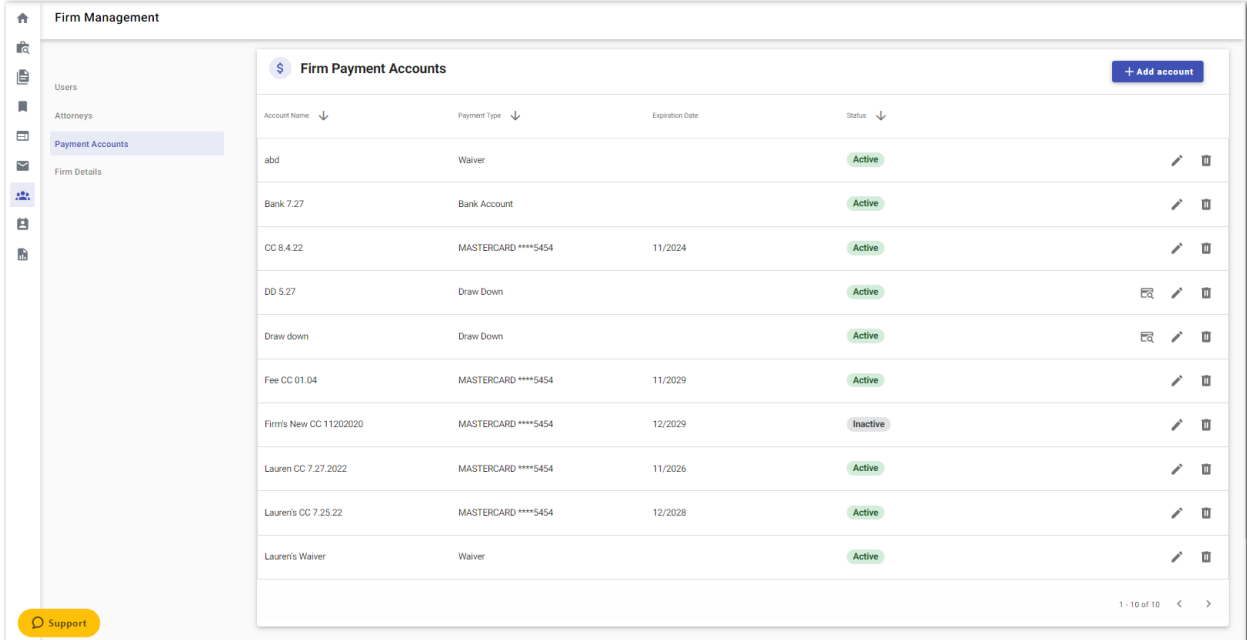


Figure 2.11 – Example of a Firm Payment Accounts Page

### Firm Details

On the Dashboard menu, click **Firm Details**. From here, you can view or edit the firm's information.

The screenshot shows the 'Firm Management' section with a sidebar containing 'Users', 'Attorneys', 'Payment Accounts', and 'Firm Details'. The 'Firm Details' page displays the following information:

Firm Details			
Firm Name Lauren's firm			
Address Line 1 5101 Tennyson Pkwy test long address line 1		Address Line 2 Ste 3451	
Country US	City Piano	State TX	Zip Code 75024
Phone Number 9724567899			

Figure 2.12 – Example of a Firm Details Page

### Firm Service Contacts

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

The screenshot shows the 'Service Contacts' section with a sidebar containing various navigation icons. The 'Firm Service Contacts' page features a '+ Add Contact' button and a table of contacts with the following data:

First Name	Last Name	Email Address	
Harvey	Birdman	harvey.birdman@tylertech.com	
Randy	Brooks	randy@brooks.com	
Lilly	Dog	lilly94321.dog@gmail.com	
Tasha	Dogster	Tasha.dogster@gmail.com	
Lauren	Groswald	lauren.groswald@gmail.com	
Bryan	Jones	bryan.jones@gmail.com	
Rocky	Jones	rocky.jones@gmail.com	
Bobby	Smith	bobby.smith@gmail.com	
Ruby	Smith	ruby@smith.com	
Phillip	Walters	phillip.walters@abclaw.com	

At the bottom of the table, there is a pagination control: 'Rows per page: 10 1 - 10 of 10 < >'.

Figure 2.13 – Example of a Firm Service Contacts Page

### Reports

On the Dashboard menu, click **Reports**. From here, you can run a report that can be used to reconcile financial transactions for envelopes and filings that you or a member of your firm submitted.

### Filings Report

Useful when reconciling financial transactions against envelopes submitted during a selectable time frame up to 60 days. \* Provides envelope and filing level information specific to fees. \* Delivered in an Excel spreadsheet to allow for filtering and searching.

**Submitted By:**

My Filings     My Firm

Locations

All Locations × Filter

Statuses

All Statuses × x ▼

Date From \* 📅      Date To \* 📅

Date From is Required.      Date To is Required.

Cancel    Download Report

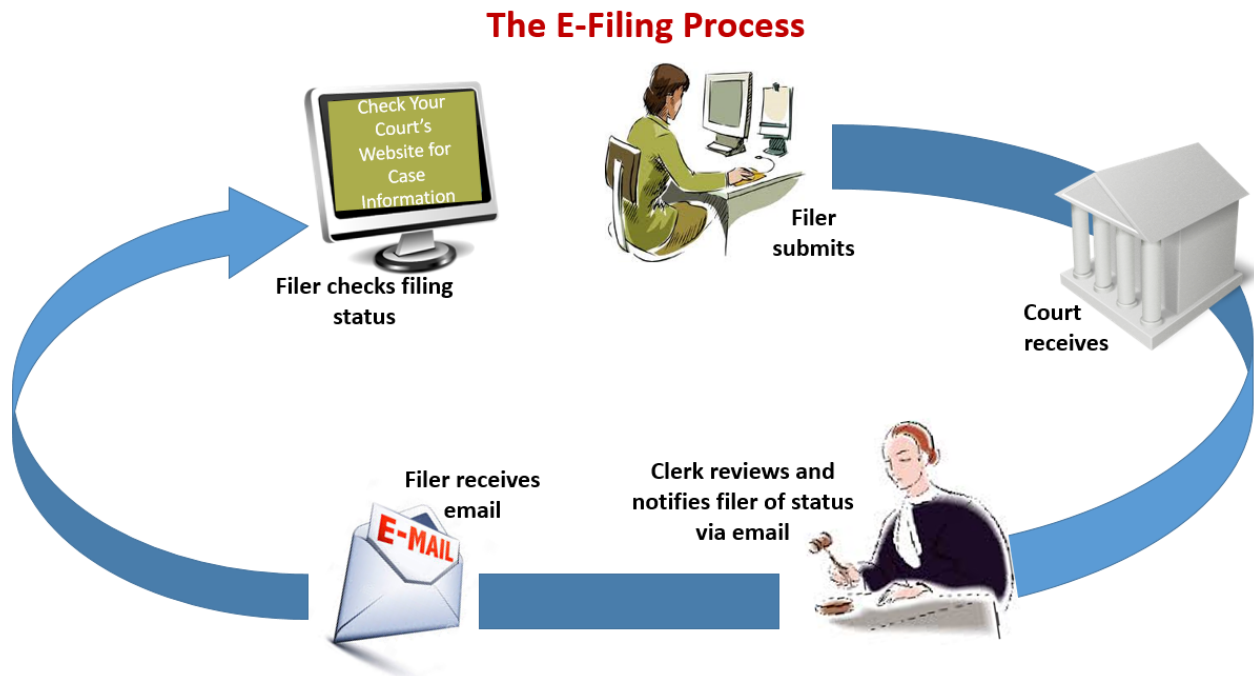
Figure 2.14 – Example of a Filings Report Page

# 3 E-Filing Overview

## Topics covered in this chapter

### ◆ Filing Queue Status

This chapter describes the e-filing process.



**Figure 3.1 – The E-Filing Process**

Once a user has registered to use ® File & Serve™, he or she can electronically submit documents (referred to as “filings”) to the court. When the user submits the filing, the filing is electronically delivered to the clerk’s inbox. The clerk then reviews the filing and either accepts, rejects, or returns the filing.

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

If the filing is rejected, the clerk sends an email to the filer with a reason for the rejection. In addition, a status of Rejected is displayed on the *Filing History* page.

If the filer has questions regarding the filing or the 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 filing status key represents the status listed for your filing.

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

**Note: EFO means EFile Only, EFS means EfileAndServe, and SO means Service Only.**

Status	Filing Type	Definition
Draft	EFO, EFS, SO	The filer has entered full or partial filing data, but has not yet submitted the filing.
Submitting	EFO, EFS, SO	The filer has submitted the filing, and all of the data is being verified.
Submitted	EFO, EFS, SO	The filing was submitted successfully and is in the Review Queue, but the clerk has not yet started the review. The filer can cancel one or more filings that are in this status.
Court Processing	EFO, EFS, SO	Some additional action needs to be taken by the court.
Under Review	EFO, EFS	A clerk reviewer has selected a filing from a queue.  <b>Note: Once a filing reaches the Under Review status, it cannot return to the Submitted status. Selecting the End Review option retains the Under Review status and returns the filing to the queue.</b>
Received	EFO, EFS	The filing has been acknowledged by the court as received, but it is not being transmitted to the case management system to become part of the court record. The filing may or may not be part of the proposed order workflow.
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 because the filer must take additional action.
Served	SO	Service Only (SO) filings are completed.

---

Status	Filing Type	Definition
Service Incomplete (Service Only filings)	SO	One or more servings failed; the service was incomplete. Example: The email or domain was rejected.
Canceled	EFO, EFS, SO	The filer has canceled the filing. The filer can cancel only draft and submitted filings.
Submission Failed	EFO, EFS	A file format or billing error has occurred when the filer submitted the filing. Failure specifics are available on the <i>Details</i> page, and the filer is notified of the specifics through email.

# 4 Landing Page

## Topics covered in this chapter

- ◆ Registering as a Firm Administrator
- ◆ Message to Users Who Have Not Activated Their Accounts
- ◆ Resetting a Forgotten Password
- ◆ Updating Firm Information

The *Landing* page serves as the gateway to File & Serve. From this page, you can register or sign in to File & Serve.

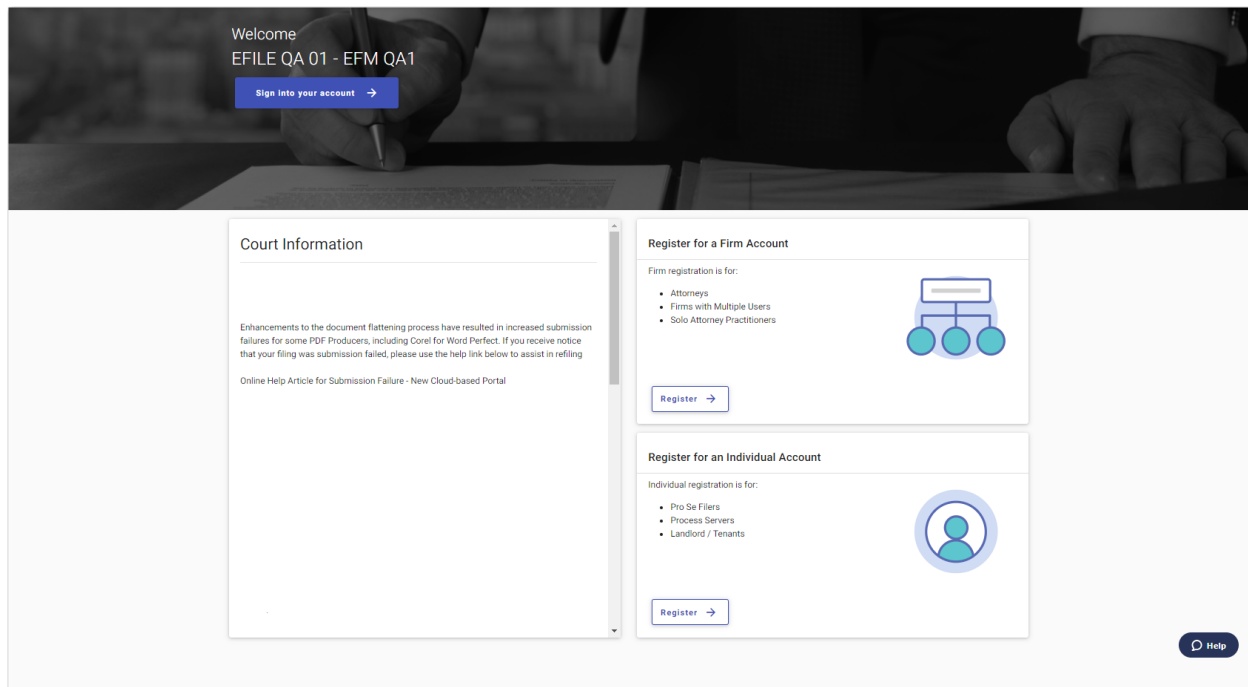


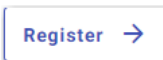
Figure 4.1 – Example of an eFile Landing Page

## Registering as a Firm Administrator

You can register your firm in File & Serve.

To register as a Firm Administrator:

1. On the *Landing* page, in the Register for a Firm Account pane, click



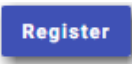
The *Firm Account Registration* page is displayed.



Figure 4.2 – Example of a Firm Account Registration Page

2. Complete the required fields.
3. Select the **I agree to the Terms and Conditions** check box.

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

4. Click  .

The *Registration Successful* page is displayed.

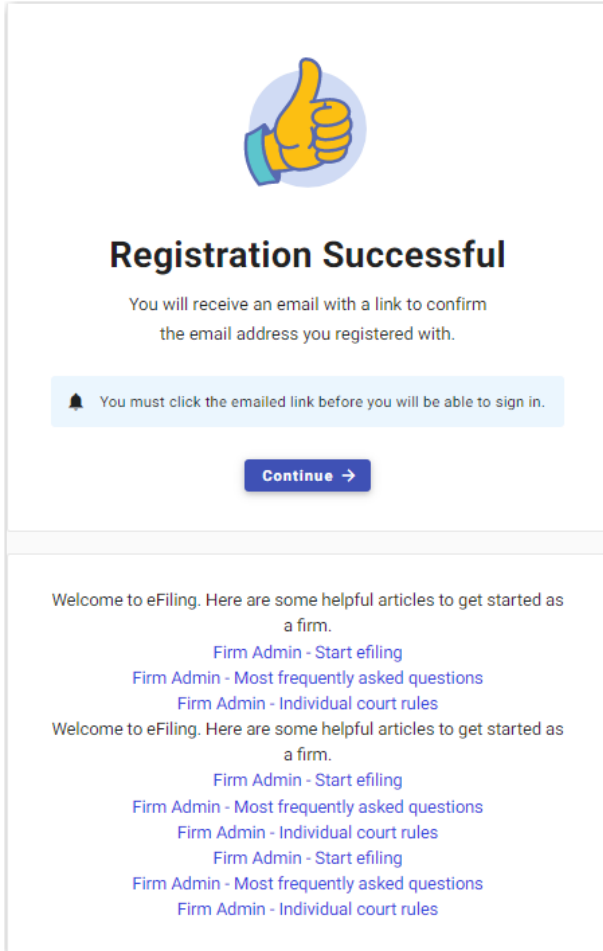


Figure 4.3 – Registration Successful Page

5. Check your inbox for the activation email from File & Serve.

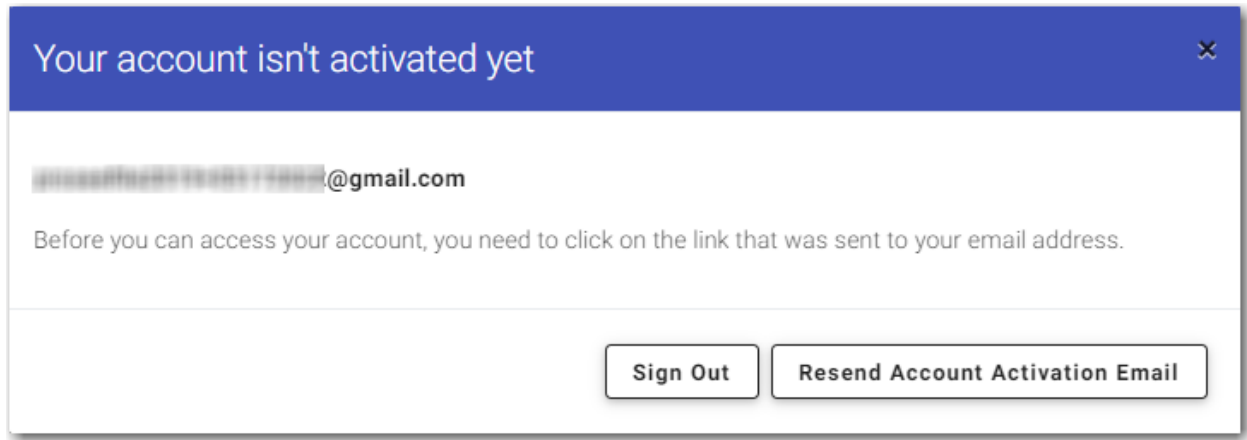
**Note: You must verify your email address to complete the registration process. A verification email (from File & Serve) will be sent to you. Open the email and click the link to confirm your email address. If you do not see the email in your inbox, check your junk mail folder for the email.**

After you verify your email address, your registration is complete.

6. You can now navigate to the *Landing* page to sign in, or click  on the *Registration Successful* page.

## Message to Users Who Have Not Activated Their Accounts

If you attempt to sign into the application before your account has been activated, a dialog box is displayed.



**Figure 4.4 – Example of Dialog Box for User Account Activation**

If you have not activated your account and you receive a reminder message to do so, click

**Resend Account Activation Email**

**Sign Out**

**Note:** Click **Sign Out** to sign out of the application.

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

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

## Resetting a Forgotten Password

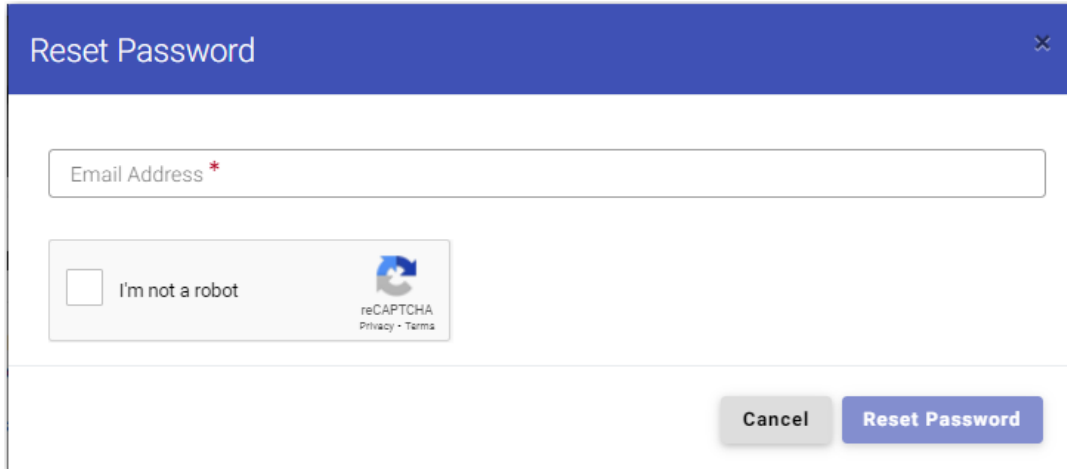
If you have forgotten your password, you can reset it from the *Sign In* page.

To reset your password:

1. On the *Sign In* page, click

**Reset Password**

The *Reset Password* window is displayed.




**Figure 4.5 – Reset Password Window**

2. Type the email address that you provided during the registration process in the **Email Address** field.
3. Select the **I'm not a robot** check box.

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

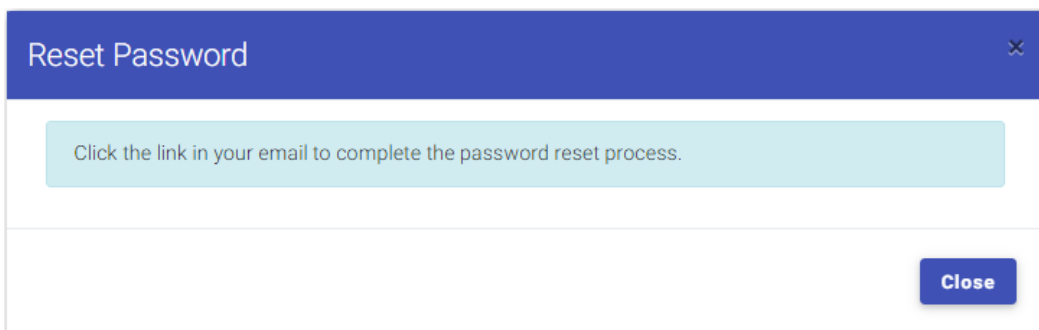
**Note: Depending on your browser, you may not see the images.**

4. Click the requested images, and then click  .

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

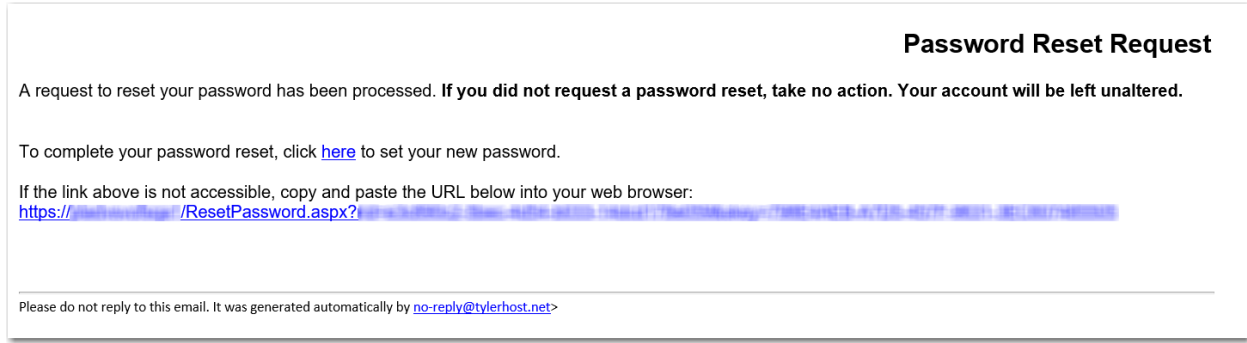
5. After selecting the correct images, click  .

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



**Figure 4.6 – Reset Password Window—Complete Reset Process**

6. Check your email inbox.
7. Locate the email from File & Serve.



**Figure 4.7 – Example of the Password Reset Request Email**

8. Click **here** to reset your password.

You are prompted to create a new password.

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

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

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

11. Click **Change Password**.

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

## Updating Firm Information

You can update the firm's information.

To update the firm's information:

1. On the Dashboard menu, click **Firm Details**.

The *Firm Details* page is displayed.

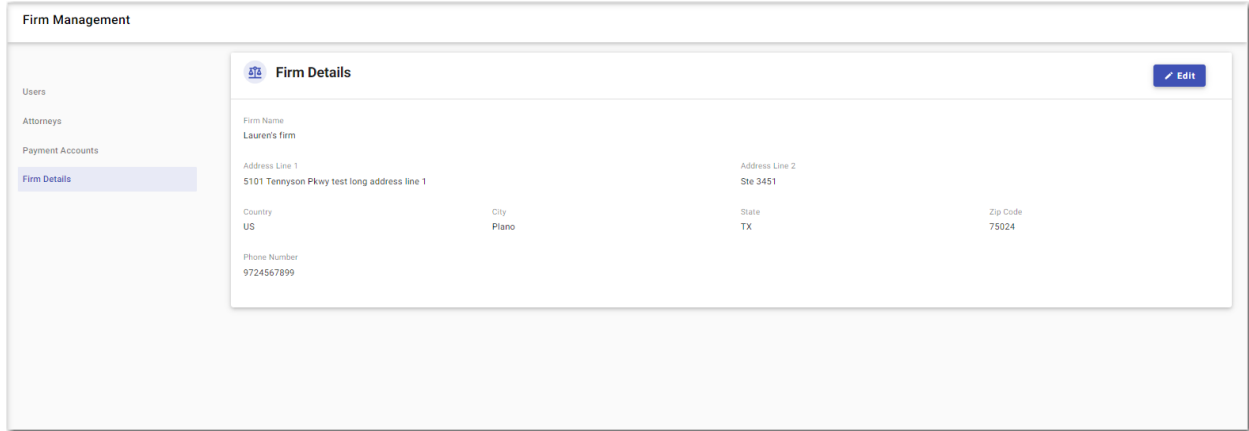


Figure 4.8 – Example of a Firm Details Page

2. Click  to update the firm details.

The *Edit Firm Details* window is displayed.

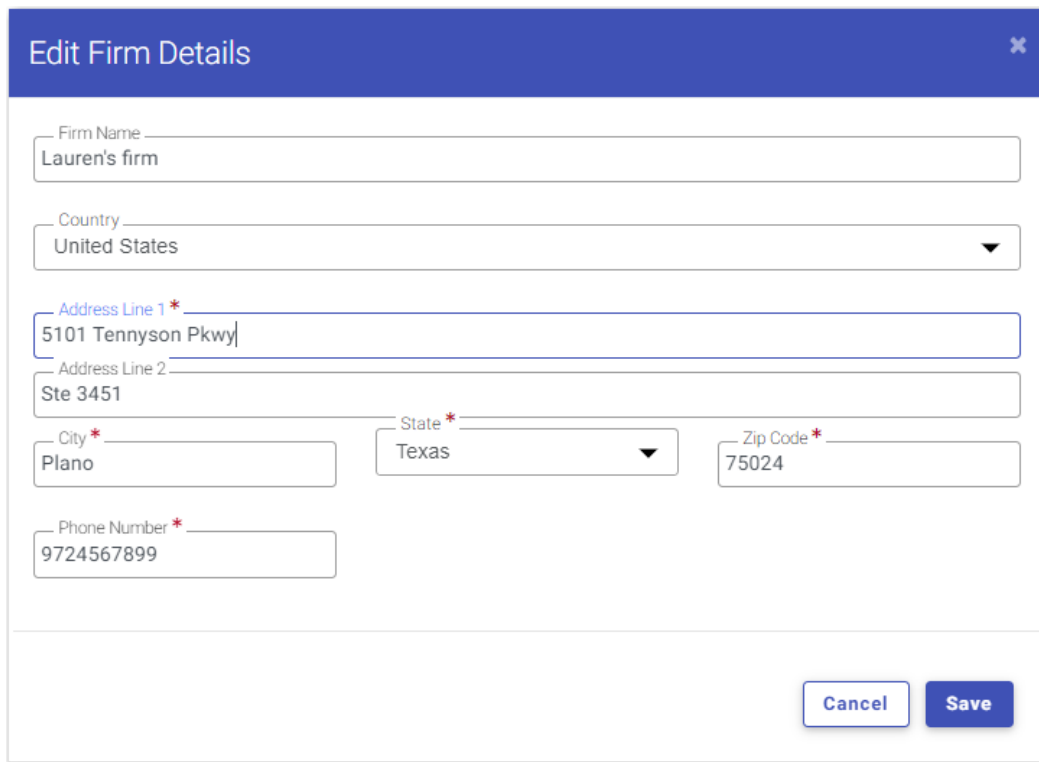



Figure 4.9 – Example of an Edit Firm Details Window

3. Update any information as needed, and then click .

# 5 Sign In and Sign Out

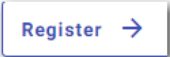
## Topics covered in this chapter

- ◆ Signing In
- ◆ Signing Out

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

## Signing In

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

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

To sign in to the application:

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

2. Click .

3. Type your email address and password (which is case-sensitive).

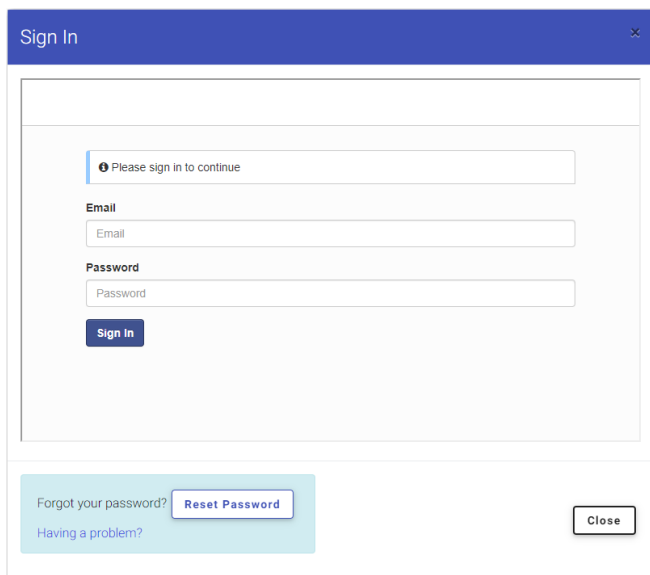


Figure 5.1 – Example of a Sign In Page

4. Click .

**Note:** After you make several failed attempts to sign in to the system, your account is locked. You can unlock your account by clicking [Forgot your password?](#)

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

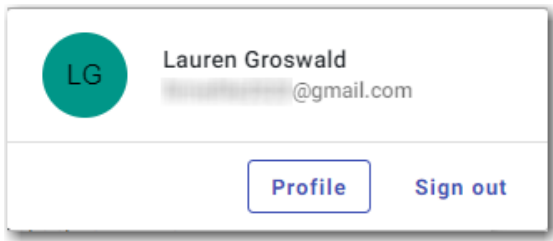
## Signing Out

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


To sign out of the application:

1. Click the drop-down arrow at the top right of the header next to your initials.

The *Manage Account* window is displayed.



**Figure 5.2 – Manage Account Window**

2. Click  .

You are now signed out of the application.



# 6 Manage Account

## Topics covered in this chapter

- ◆ Updating the User Profile
- ◆ Changing Your User Password
- ◆ Selecting Email Notifications
- ◆ Updating Preferences

You can manage some of your account settings when you are signed in to File & Serve.

You can perform the following actions:

- Change your password
- Update your user profile
- Update your preferences for the following features:
  - Enabling or disabling hot keys in File & Serve
  - Enabling or disabling the Document Merge feature
- Select your email notifications regarding your case filings

## Updating the User Profile

You can update your user profile on the *User Profile* page.

To update your user profile:

1. Click the drop-down arrow at the top right of the header next to your initials.

The *Manage Account* window is displayed.

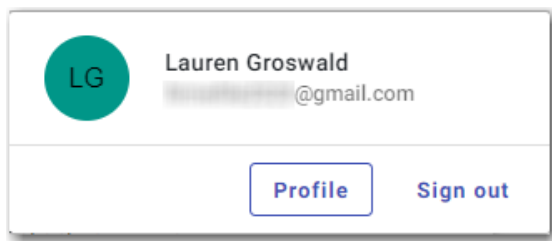


Figure 6.1 – Example of a Manage Account Window

2. Click  .

The *User Profile* page is displayed.

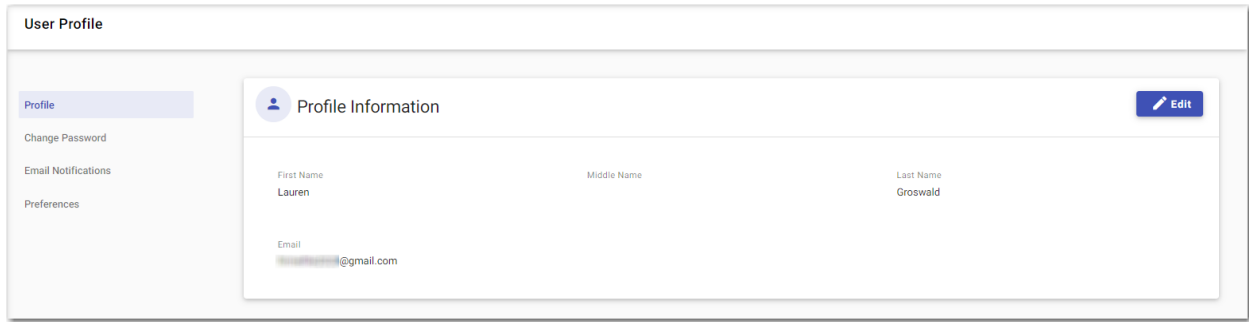
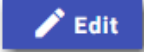


Figure 6.2 – Example of a User Profile Page

3. Verify that your information is correct. If you need to make changes, click . The *Edit Profile Information* window is displayed.

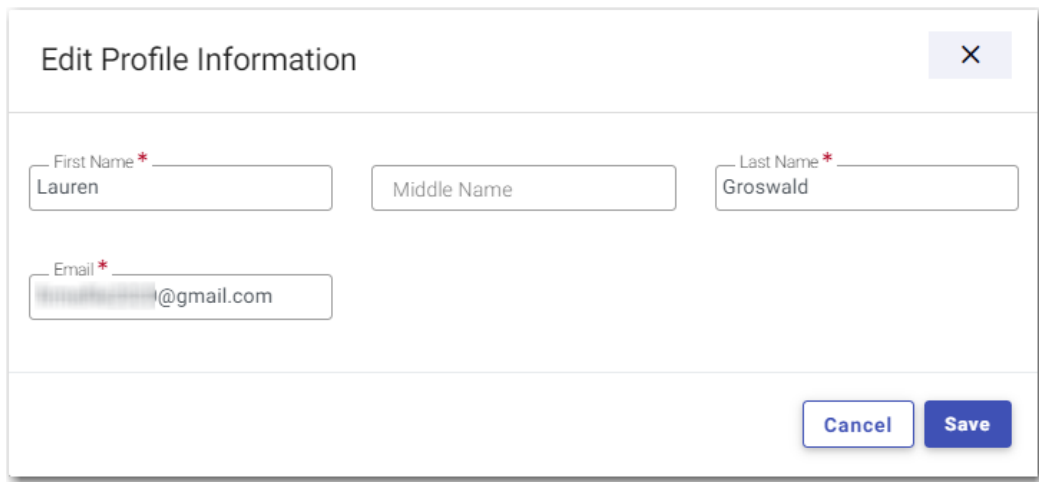


Figure 6.3 – Example of an Edit Profile Information Window

4. Make the necessary changes to your profile. Then, click .

## Changing Your User Password

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

To change your password:

1. Click the drop-down arrow at the top right of the header next to your initials. The *Manage Account* window is displayed.

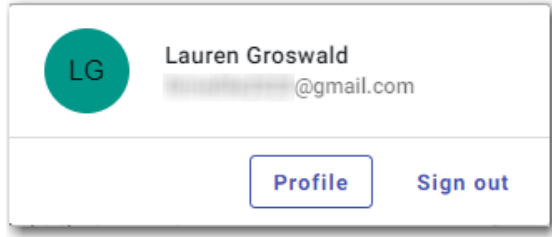
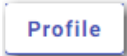



Figure 6.4 – Example of a Manage Account Window

2. Click  .  
The *User Profile* page is displayed.
3. Click **Change Password**.  
The *Change Password* page is displayed.

 A screenshot of the 'User Profile' page. On the left is a sidebar menu with options: Profile, Change Password (highlighted), Email Notifications, and Preferences. The main content area is titled 'Change Password' and contains three input fields: 'Old Password \*', 'New Password \*', and 'Re-enter New Password'. Below the fields are four password requirements: 'Must contain 8 characters', 'Must contain one uppercase letter', 'Must contain one lowercase letter', and 'Must contain either a number or symbol'. A 'Save' button is located at the bottom right of the form.

Figure 6.5 – Change Password Page

4. Type the old password in the **Old Password** field.
5. Type the new password in the **New Password** field.  
**Note: Your password is case-sensitive and must be at least eight characters in length with at least one lowercase letter, one uppercase letter, and one number or symbol.**
6. Retype the new password in the **Re-enter New Password** field.
7. Click  .  
Your password is changed.

## Selecting Email Notifications

On the *Email Notifications* page, you can select the email notifications that you want to receive for case filings.

To select your email notifications:

1. Click the drop-down arrow at the top right of the header next to your initials.

The *Manage Account* window is displayed.

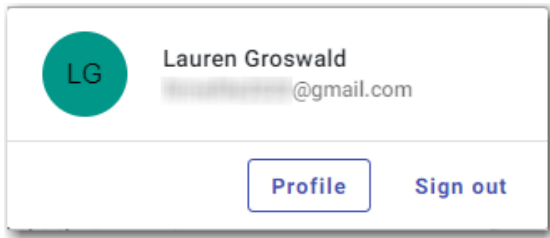


Figure 6.6 – Example of a Manage Account Window

2. Click .

The *User Profile* page is displayed.

3. Click **Email Notifications**.

The *Email Notifications* page is displayed.

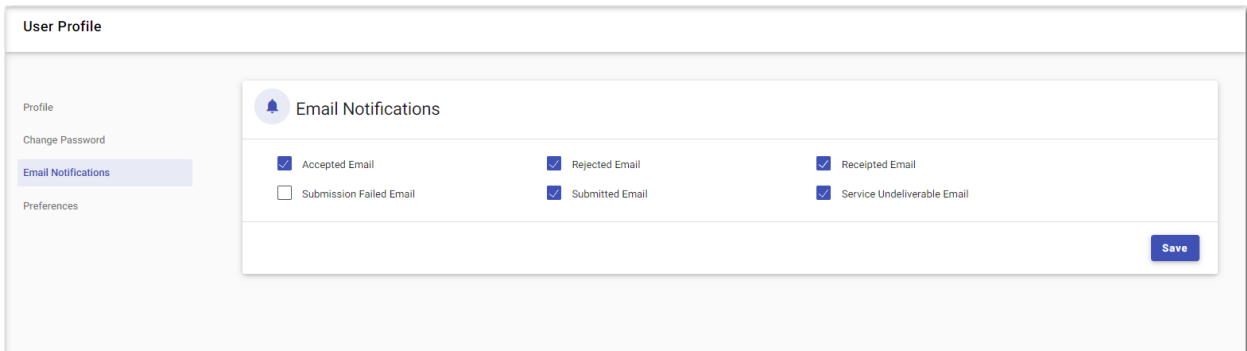


Figure 6.7 – Example of an Email Notifications Page

4. Select the check box for each type of email notification that you want to receive for your case filings.

5. Click .

## Updating Preferences

You can update your preferences for Hot Keys and the Document Merge feature on the *User Profile* page.

To update your preferences:

1. Click the drop-down arrow at the top right of the header next to your initials.

The *Manage Account* window is displayed.

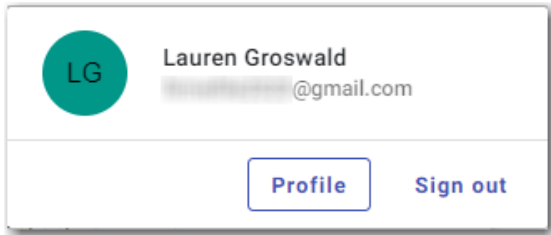
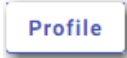


Figure 6.8 – Example of a Manage Account Window

2. Click  .

The *User Profile* page is displayed.

3. Click **Preferences**.

The *Preferences* page is displayed.

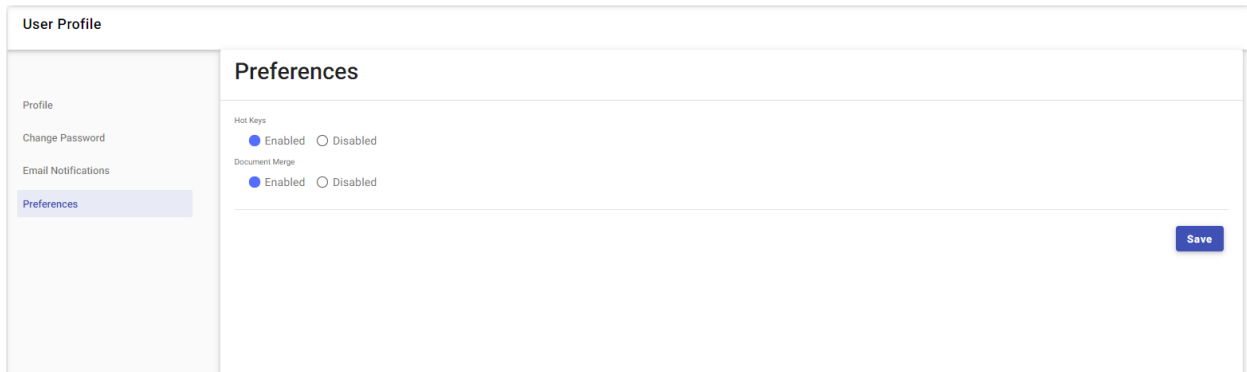


Figure 6.9 – Example of a Preferences Page

4. Select either the **Enabled** option or the **Disabled** option for Hot Keys.
5. Select either the **Enabled** option or the **Disabled** option for the Document Merge feature.

6. Click  .

# 7 Dashboard

## Topics covered in this chapter

### ◆ Dashboard Page

The Dashboard provides a drop-down list for Firm Administrator actions.

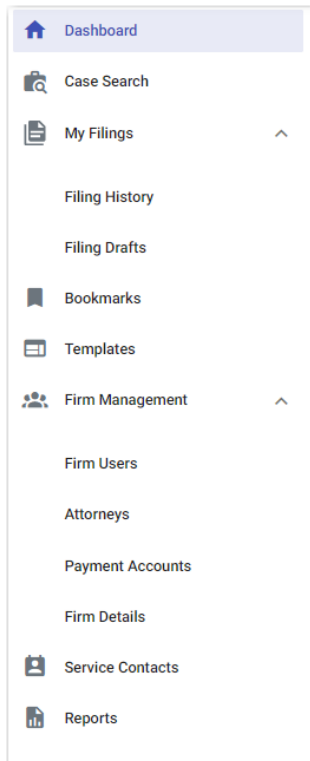



Figure 7.1 – Example of a Dashboard



On the *Dashboard* page, click the Dashboard icon (  ) to view the Dashboard. The icon is a toggle, so you can click it again to hide the Dashboard. When the Dashboard is hidden, only the icons for each option are displayed.

From the Dashboard, you can perform the following actions:

- Access the *Dashboard* page to start a filing, perform a case search, view your filing history, view your draft filings, access the cases you have bookmarked, and access the templates you have created.
- File into an existing case on the *Search for Case* page.
- Access the *Filing History* page to view a list of your case filings.
- Access the *Filing Drafts* page to view a list of your draft filings.
- Access the *Bookmarks* page to view a list of cases that you have bookmarked for quick access.

- Access the *Templates* page to locate an existing template and quickly begin a new case filing.
- Access the *Users* page to add and remove firm users.
- Access the *Attorneys* page to add and remove firm attorneys.
- Access the *Payment Accounts* page to set up and manage the firm's payment accounts.
- View and update your firm information on the *Firm Details* page.
- Access the *Firm Service Contacts* page to add and manage the firm's service contacts list.
- Access the *Reports* page to generate reports for envelopes and filings that you or your firm submitted.

## Dashboard Page

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

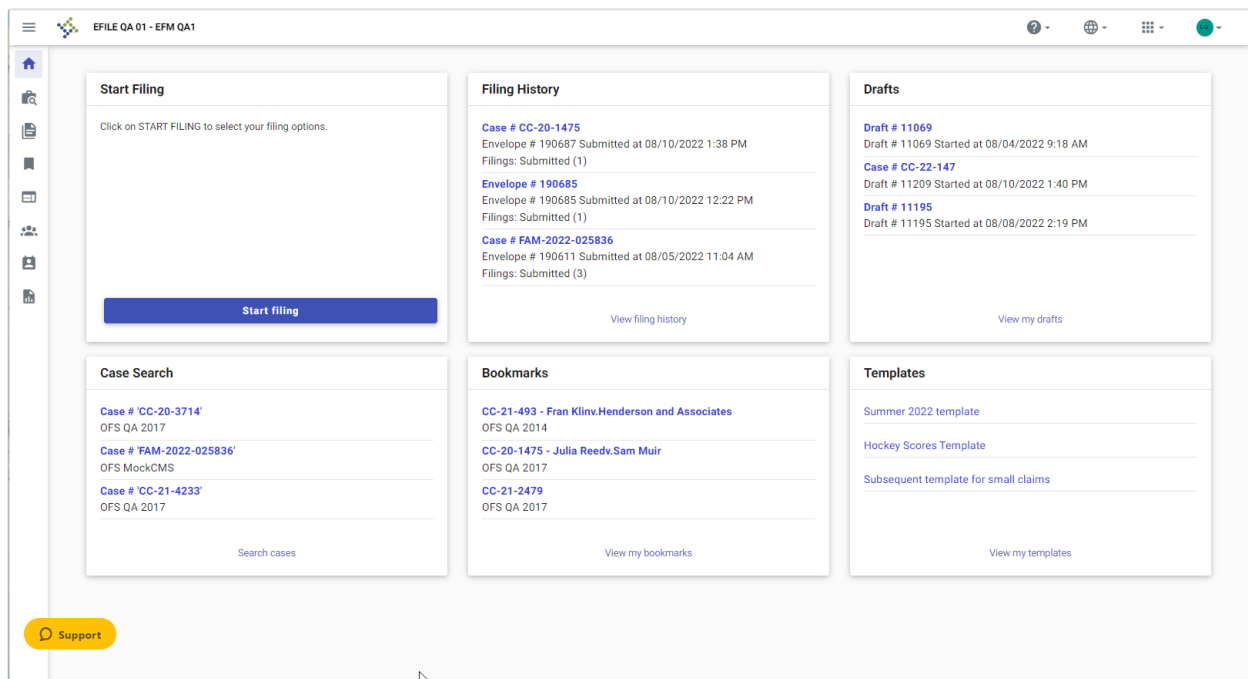


Figure 7.2 – Example of a Dashboard Page

### Account Setup

The first time that you access the *Dashboard* page, a warning message is displayed directing you to set up payment accounts and attorneys for the firm. The message continues to be displayed every time that you access the *Dashboard* page until you have performed both actions.

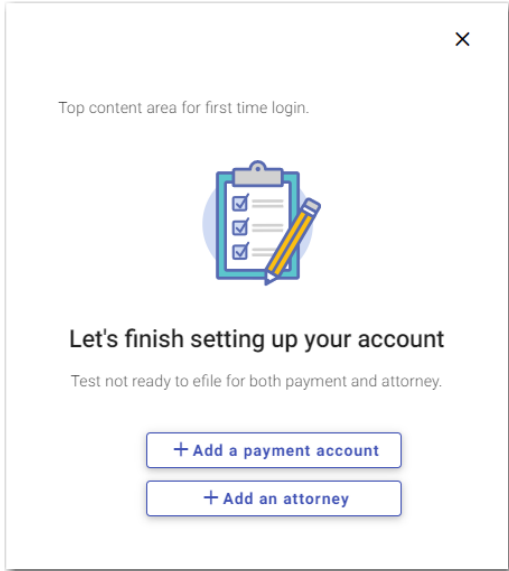


Figure 7.3 – Warning Message

To set up a payment account, click

**+ Add a payment account**

. The *Firm Payment Accounts* page is displayed.

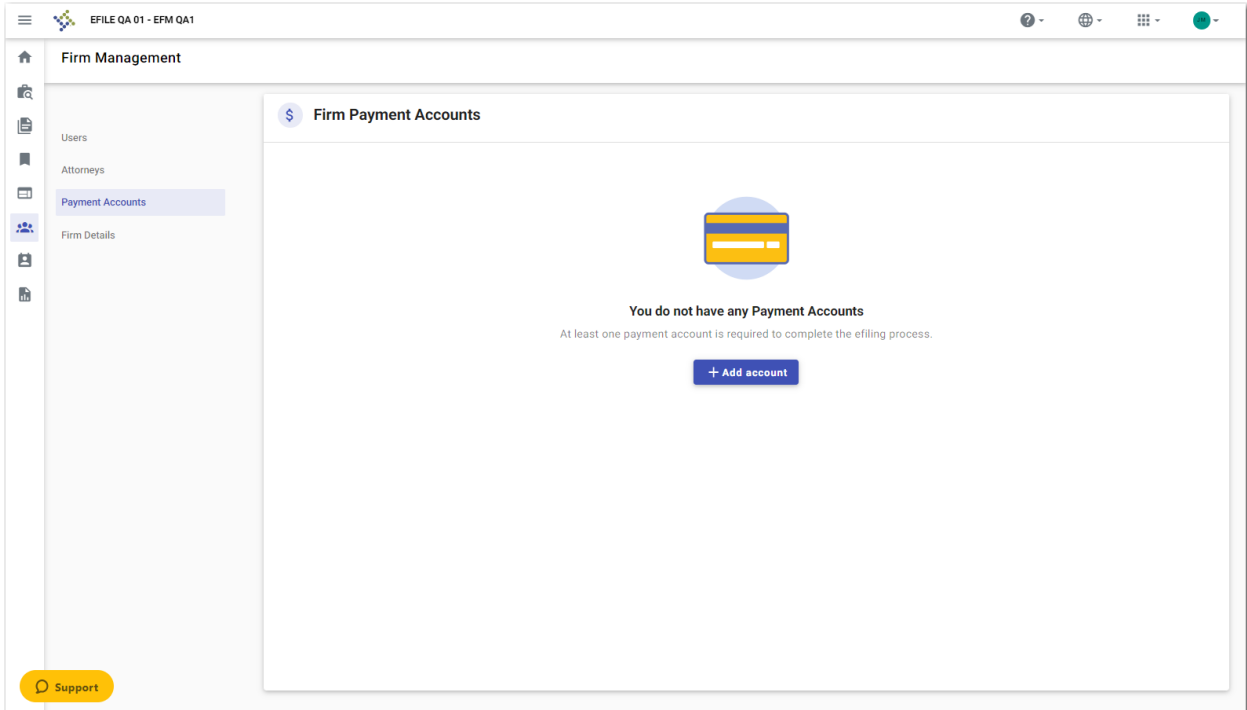


Figure 7.4 – Firm Payment Accounts Page for Account Setup

Click


**+ Add account**

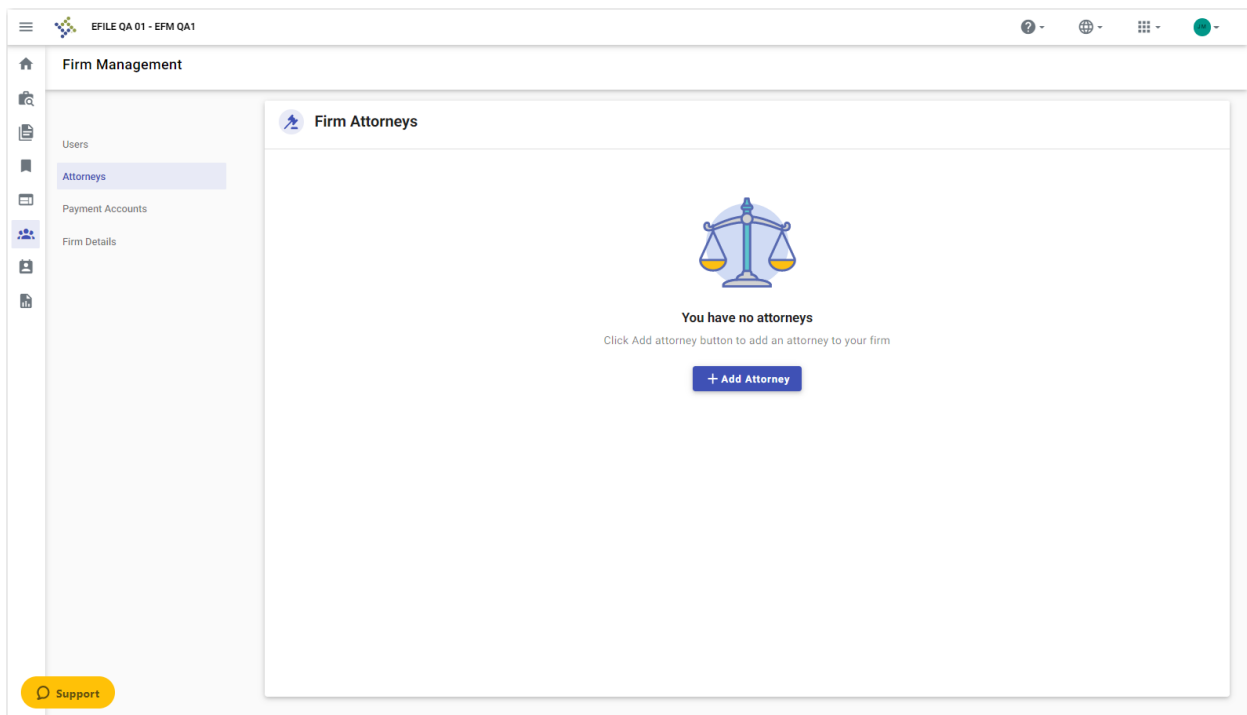
. The *Add Payment Account* window is displayed.



**Figure 7.5 – Add Payment Account Window**

Follow the steps to set up a payment account. Refer to [Payment Accounts](#), page 56 for more information.

To add an attorney, click . The *Firm Attorneys* page is displayed.



**Figure 7.6 – Firm Attorneys Page for Account Setup**

Click .

The *Add Attorney* window is displayed.

**Add Attorney** [X]

**Attorney Information**  
Test add attorney content.

First Name \* Middle Name Last Name \*

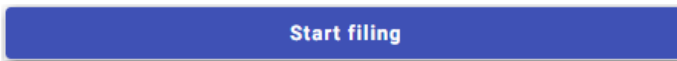
Attorney or bar number ⓘ

Cancel Save

**Figure 7.7 – Add Attorney Window**

Follow the steps to add an attorney. Refer to [Adding an Attorney to the Firm](#), page 51 for more information.

### Start Filing



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

### Filing History

Click **View Filing History** to access the *Filing History* page. From here, you can view the status of the firm's filings, check the filing type, get a document description, see the number assigned to cases, review the details of cases, view the service contacts attached to a case, and cancel a filing.

The screenshot displays the 'Filing History' page. At the top, it shows 'EFILE QA 01 - EFM QA1' and a 'Filter' button. The main content area is titled 'Filing History' and includes a 'Sort by: Newest to Oldest' dropdown and '162 results' text. Below this, there are four filing entries, each with a 'Submitted' date and time, a 're:Search' button, and an 'Actions' dropdown. The entries are as follows:

- Case # CC-20-1475**: Submitted Aug 10, 2022 6:38:50 PM. Filing Status: Submitted. Filing Code: Application. Filing Type: eFile Only. Filing Description: (blank). Client Ref #: (blank). Submitted By: Lauren Groswald.
- Case # CC-22-147**: Submitted Aug 10, 2022 5:23:10 PM. Filing Status: Accepted. Filing Code: Action - Initial Only. Filing Type: eFile and Serve. Filing Description: (blank). Client Ref #: (blank). Submitted By: Lauren Groswald, Filing Attorney: Jack Stone.
- Envelope # 190634**: Submitted Aug 5, 2022 5:32:48 PM. Filing Status: Submitted. Filing Code: Complaint for Repossession of Rent. Filing Type: eFile Only. Filing Description: Landlord / Tenant Case Filing. Client Ref #: 1. Submitted By: Lauren Groswald, Filing Attorney: Abby Carmichael.
- Case # FAM-2022-025836**: Submitted Aug 5, 2022 4:04:42 PM. Filing Status: Submitted. Filing Code: (blank). Filing Type: (blank). Filing Description: (blank). Client Ref #: (blank). Submitted By: Lauren Groswald, Filing Attorney: Abby Carmichael.

A 'Support' button is located in the bottom left corner of the interface.

Figure 7.8 – Filing History Page

### Drafts

Click **View My Drafts** to access the *Filing Drafts* page. From here, you can view the firm's draft filings, resume a filing, or delete a draft filing.

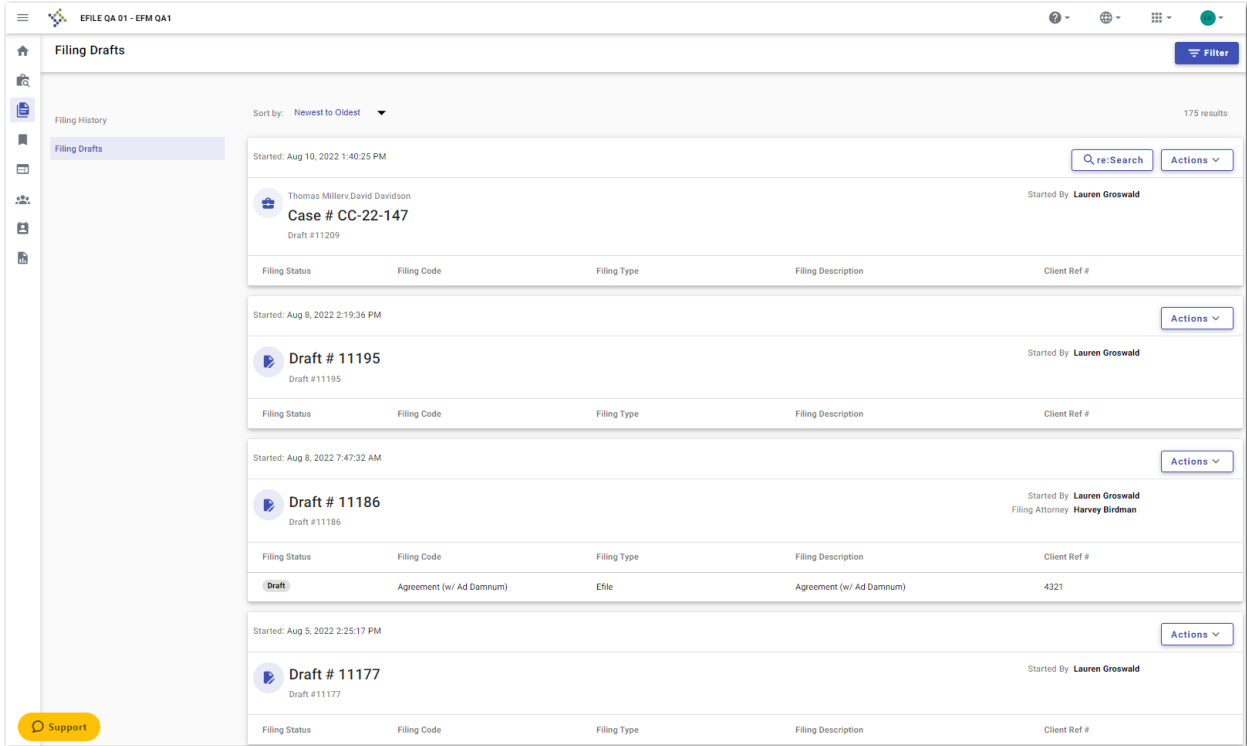
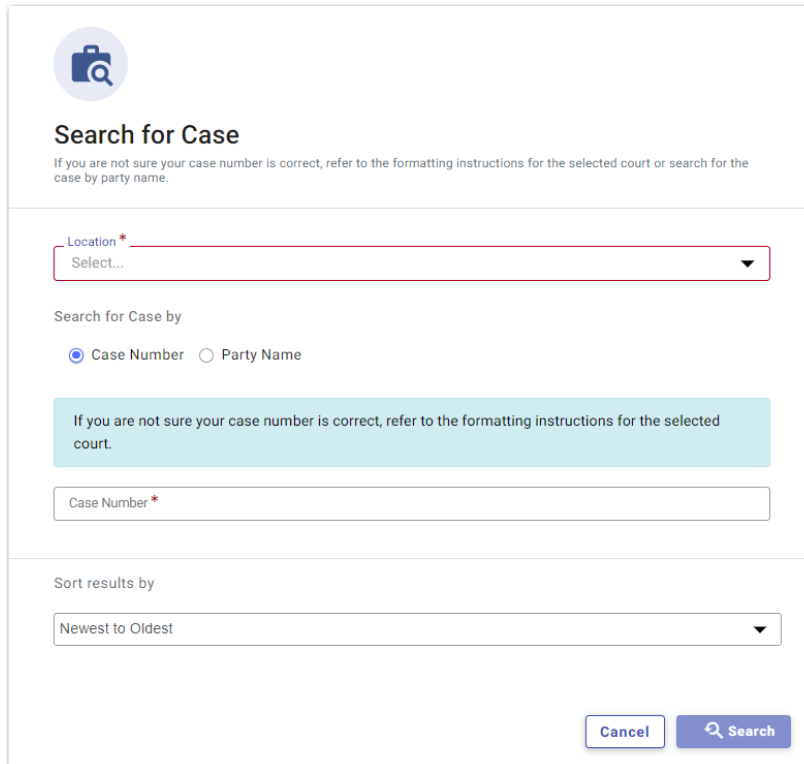


Figure 7.9 – Filing Drafts Page

### Case Search

Click **Search Cases** to search for a case in the system. From here, you can search for an existing case or file into an existing case. Advanced search features are available if you search by either a party name or a business name.



The image shows a search interface for cases. At the top left is a magnifying glass icon. Below it is the title "Search for Case" and a note: "If you are not sure your case number is correct, refer to the formatting instructions for the selected court or search for the case by party name." The form includes a "Location\*" dropdown menu with "Select..." as the current selection. Below this is a "Search for Case by" section with two radio buttons: "Case Number" (which is selected) and "Party Name". A light blue informational box contains the text: "If you are not sure your case number is correct, refer to the formatting instructions for the selected court." Below this is a "Case Number\*" text input field. At the bottom left is a "Sort results by" dropdown menu with "Newest to Oldest" selected. At the bottom right are two buttons: "Cancel" and "Search" (with a magnifying glass icon).

Figure 7.10 – Example of a Search for Case Page

**Note:** Your system may be configured to search only by case number. With this optional configuration, the Party Name option is not displayed.

### Bookmarks

Click **View My Bookmarks** to access a list of cases that you or another firm user have bookmarked for quick access.

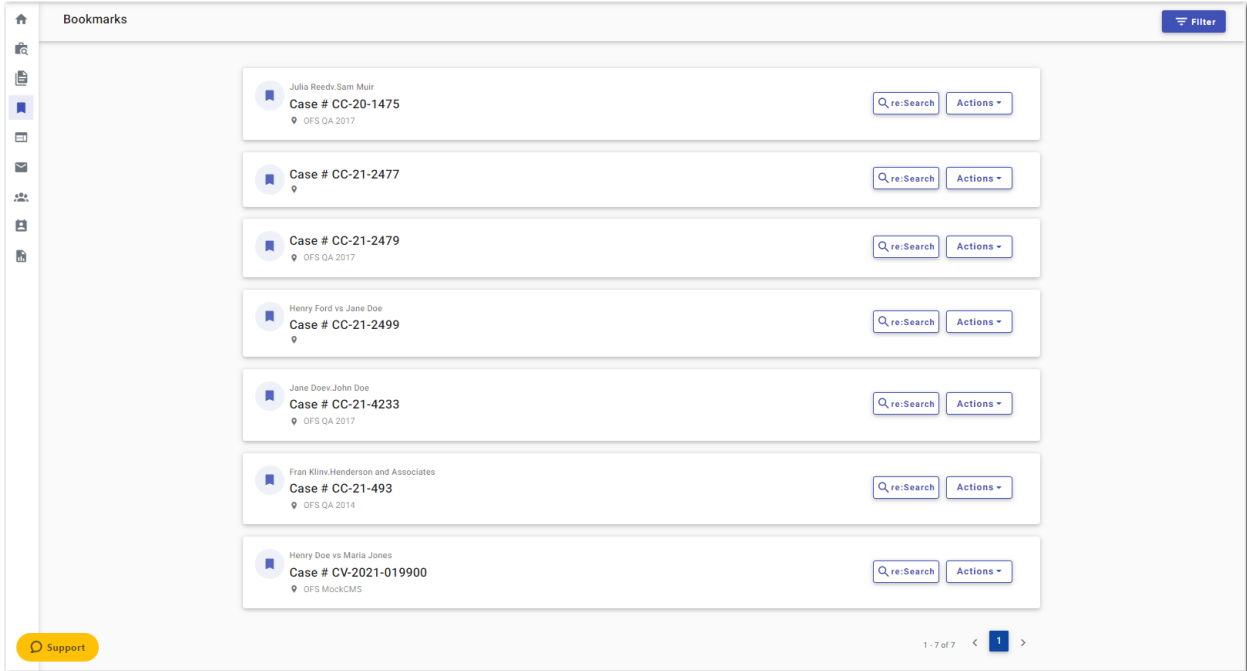


Figure 7.11 – Example of a Bookmarks Page

### Templates

Click **View My Templates** to locate a template to use in your case filing or to create a new template for future use.

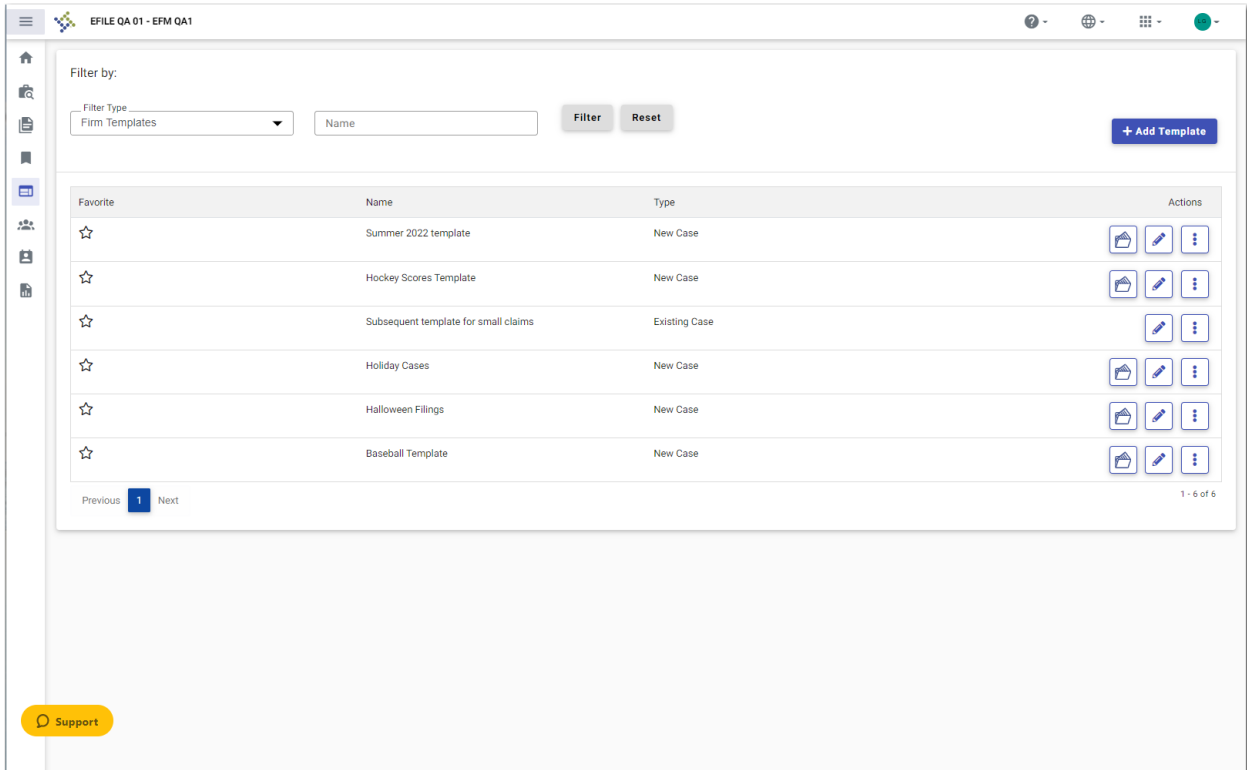


Figure 7.12 – Example of a Templates Page

# 8 Firm Administrator Functions

## Topics covered in this chapter

- ◆ Manage Firm Users
- ◆ Manage Attorneys

Firm Administrators are responsible for managing users, attorneys, and payment accounts; and for updating the firm's information.

## Manage Firm Users

The Firm Administrator is responsible for adding and inviting new users, as well as for removing users.

### Adding a New User to the Firm

**Note: Only the Criminal Filing Firm Administrator can assign the Criminal Filing role to a filer. To obtain the Criminal Filing Firm Administrator role, contact Tyler Support.**

To add a new user to your firm:

1. On the Dashboard menu, click **Firm Users**.

The *Firm Users* page is displayed.

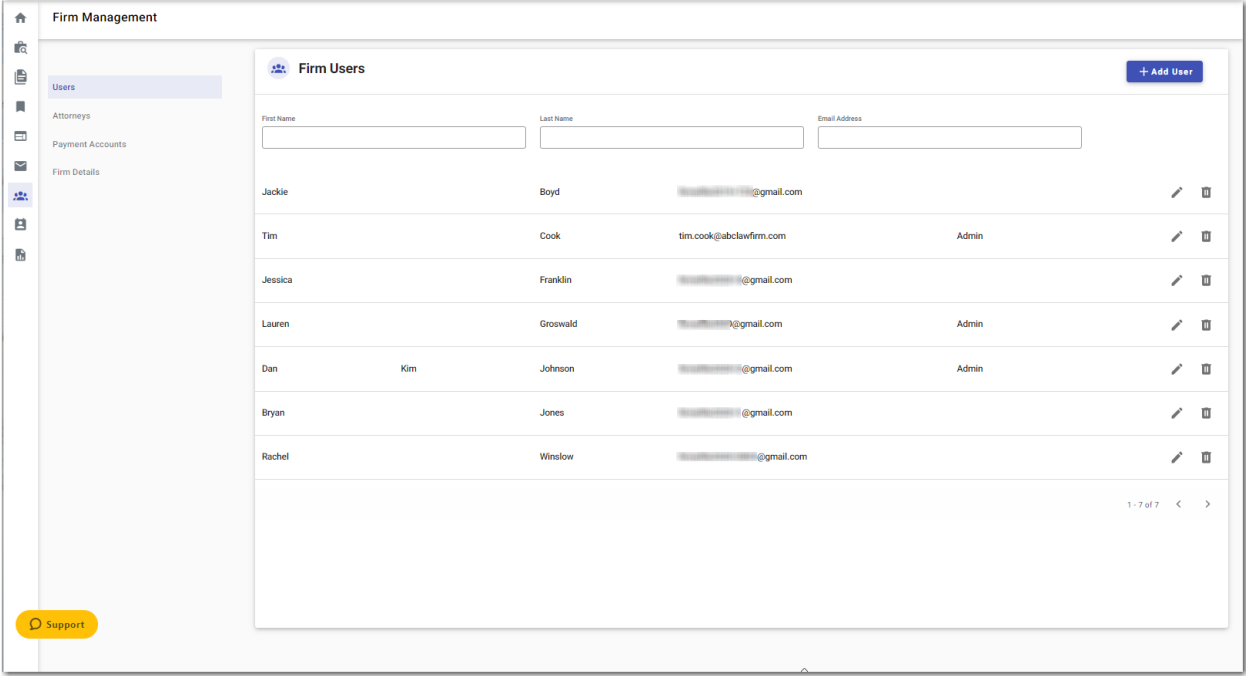


Figure 8.1 – Example of a Firm Users Page

- 2. Click  .

The *Add User* window is displayed.



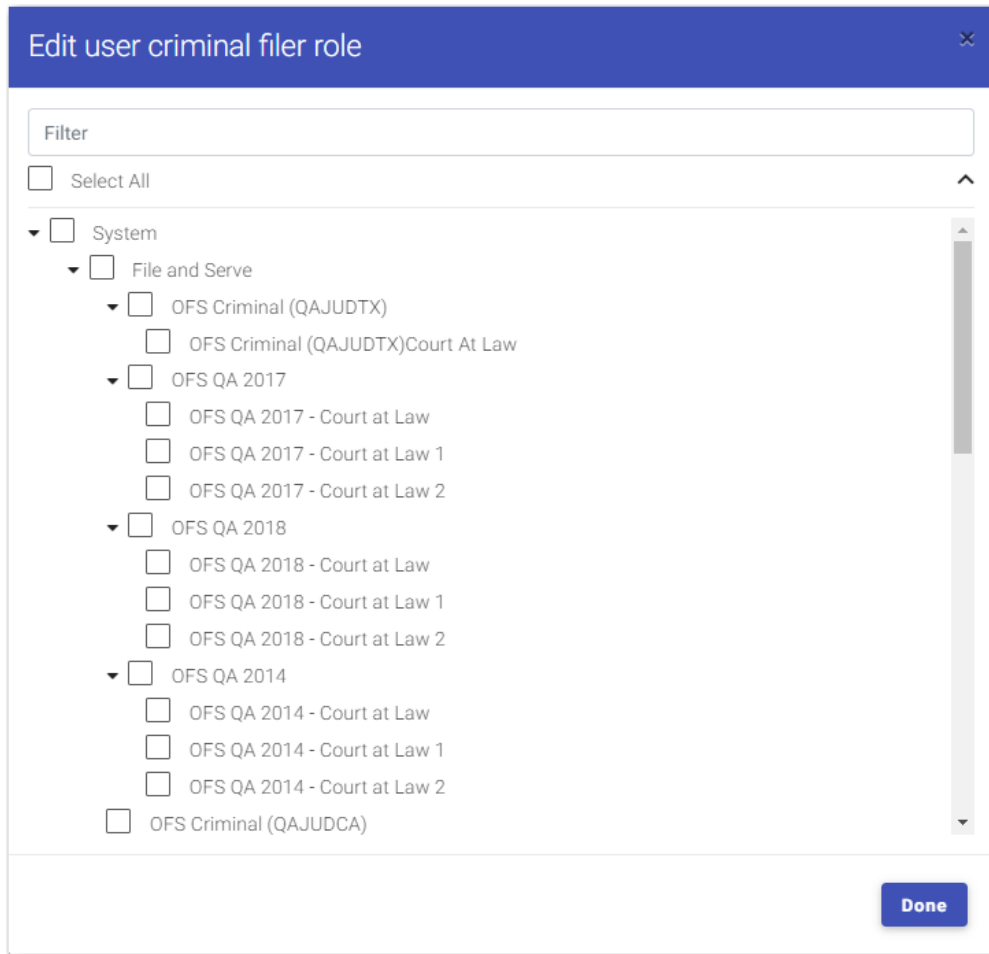
**Figure 8.2 – Add User Window**

3. Type the name of the new user in the **First Name** and **Last Name** fields. If you know the middle name, type it in the **Middle Name** field.
4. Type the new user’s email address in the **Email** field.
5. Select the check boxes for the roles that you want to assign to the new user. If you do not want to assign a role to the user, leave the check box cleared.

**Note:** All new users have the Filer role (not displayed in the pane) assigned to them when they are created. You can assign additional roles—such as Firm Admin, Criminal Firm Admin, or Criminal Filer—to new users by selecting one or more of the check boxes in the pane. However, you must have the Criminal Filing Firm Administrator role to assign the Criminal Filing Firm Administrator role to another user, or to assign the Criminal Filing role to a filer.


6. Click  to assign the Criminal Filer role.

The *Edit user criminal filer role* window is displayed.



**Figure 8.3 – Edit User Criminal Filer Role Window**

7. Select the locations where you want the new user to have the Criminal Filing Filer role.

8. After selecting the locations, click .

9. After you have entered all of the information for the new user, click .

An activation email will be sent to the new user, along with a second email about resetting the user's password.

## Resetting a Firm User's Password

As a Firm Administrator, you can reset a user's password if the user has forgotten it and needs to have it reset.

To reset a user's password:

1. On the Dashboard menu, click **Firm Users**.

The *Firm Users* page is displayed.

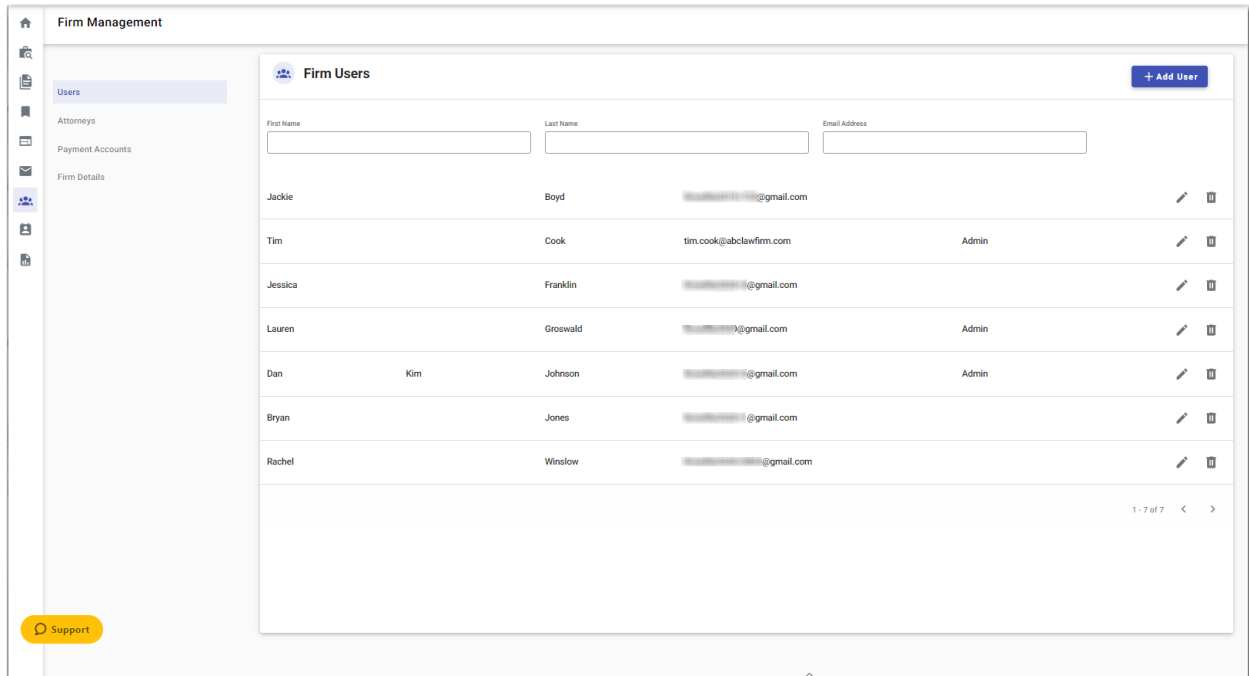


Figure 8.4 – Example of a Firm Users Page


2. Locate the firm user for whom you want to reset the password, and then, click  .  
The *Edit User* window is displayed.

Figure 8.5 – Edit User Window

3. Click  .

The *Change Password* window is displayed.

Figure 8.6 – Change Password Window

4. Type the new password in the **New Password** field.

**Note:** The 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.

5. Retype the new password in the **Confirm New Password** field.

6. Click  .

## Editing a Firm User's Information

To edit a firm user's information:

1. On the Dashboard menu, click **Firm Users**.

The *Firm Users* page is displayed.

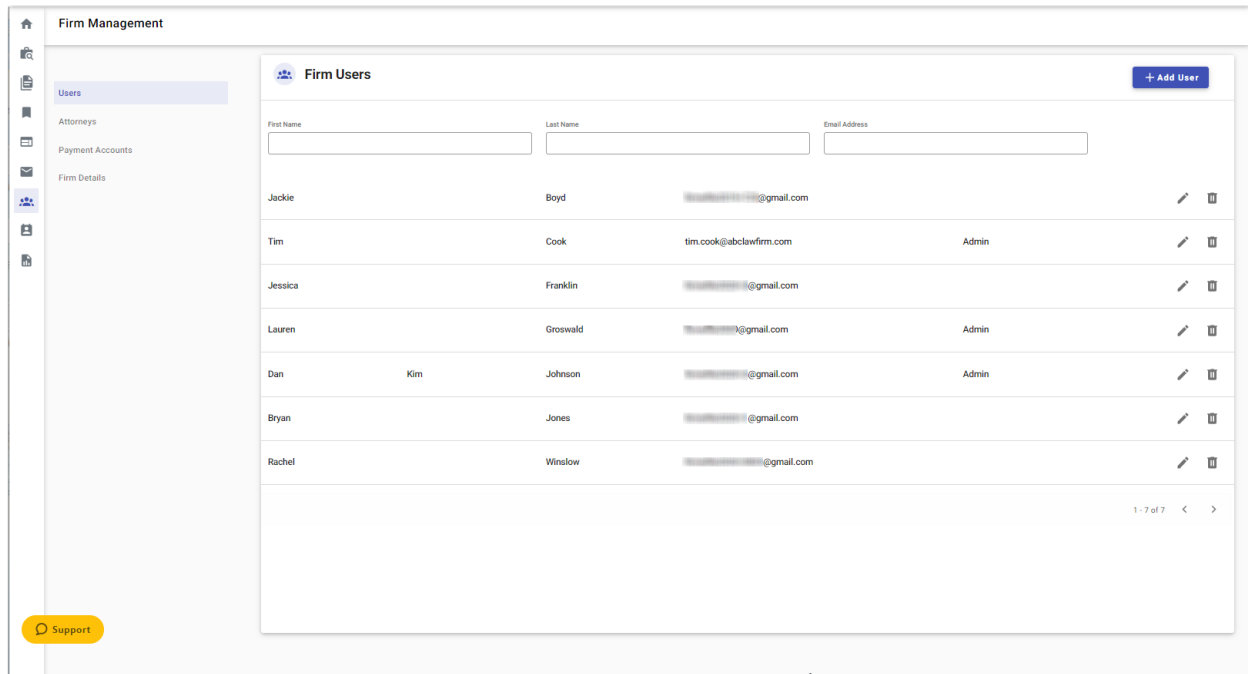



Figure 8.7 – Example of a Firm Users Page

2. Locate the firm user for whom you want to change the information, and then, click  .

The *Edit User* window is displayed.

The screenshot shows a window titled "Edit User" with a close button in the top right corner. The window is divided into two main sections: "User Information" and "User Role".

**User Information**


- First Name \*: Input field containing "Janice".
- Middle Name: Input field.
- Last Name \*: Input field containing "Joplin".
- Email \*: Input field containing "janice.joplin@abclawfirm.com".
- Reset Password: Button.

**User Role**

- Firm Admin
- Criminal Firm Admin
- Criminal Filer

At the bottom right of the window are two buttons: "Cancel" and "Save".

Figure 8.8 – Edit User Window

3. Update the necessary information, and then click  .

## Removing a User from the Firm

To remove a user from the firm:

1. On the Dashboard menu, click **Firm Users**.

The *Firm Users* page is displayed.

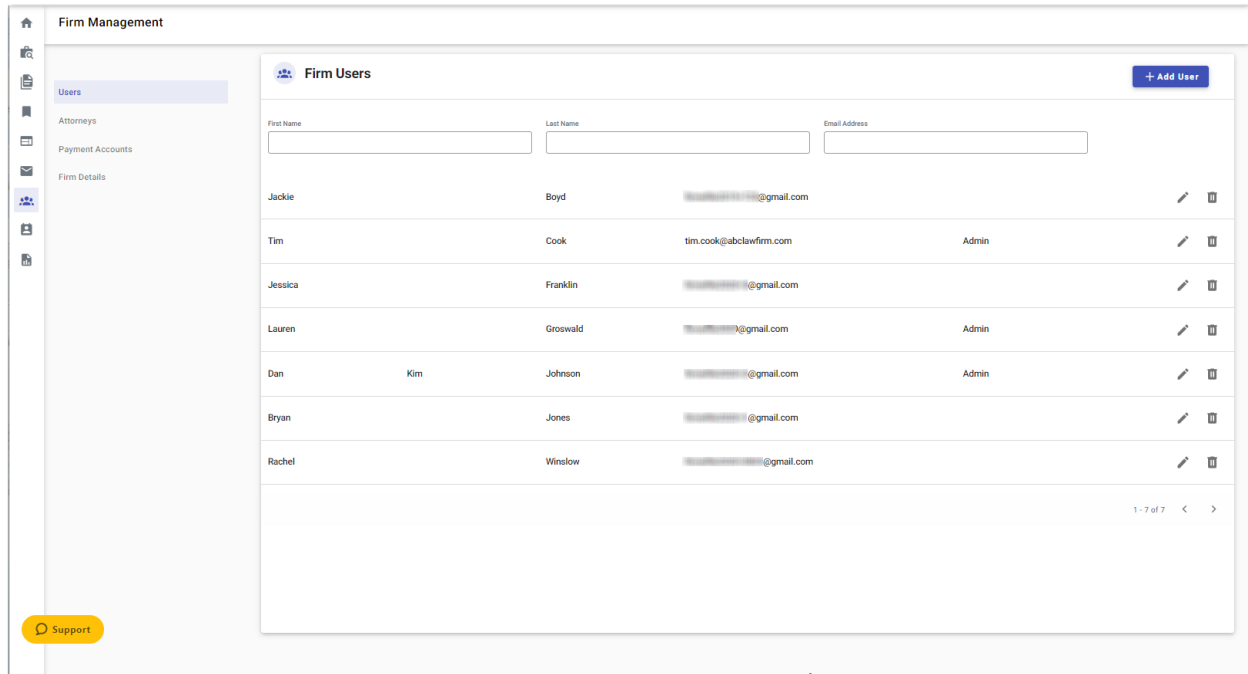

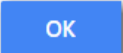
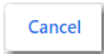



Figure 8.9 – Example of a Firm Users Page

2. Locate the user who you want to remove from the firm, and then click .

**Note:** You cannot delete yourself from the firm. The Delete icon is disabled for the user who is currently signed in to the system.

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

3. Click  to remove the user from the firm, or click  to cancel the action.

If you clicked , a confirmation message is displayed, and the user is removed from the firm.

## Manage Attorneys

The Firm Administrator is responsible for managing the firm’s attorneys.

### Adding an Attorney to the Firm

To add an attorney to the firm:

1. On the Dashboard menu, click **Firm Attorneys**.

The *Firm Attorneys* page is displayed.

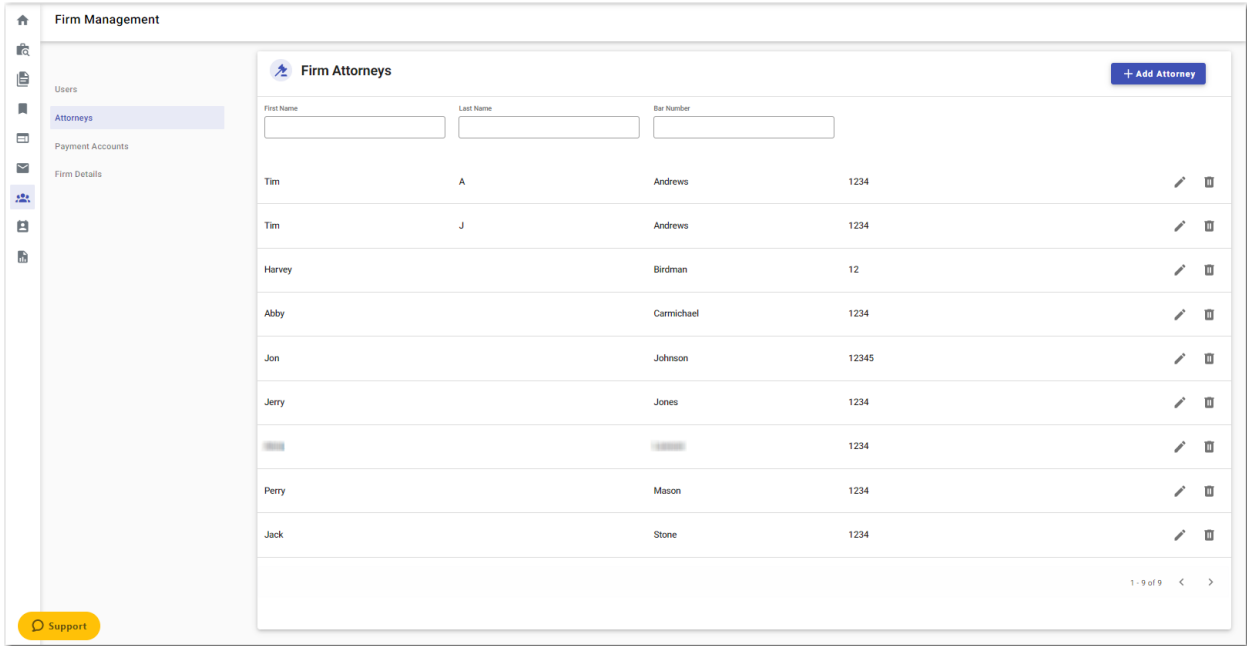



Figure 8.10 – Example of a Firm Attorneys Page

2. Click  .

The *Add Attorney* window is displayed.

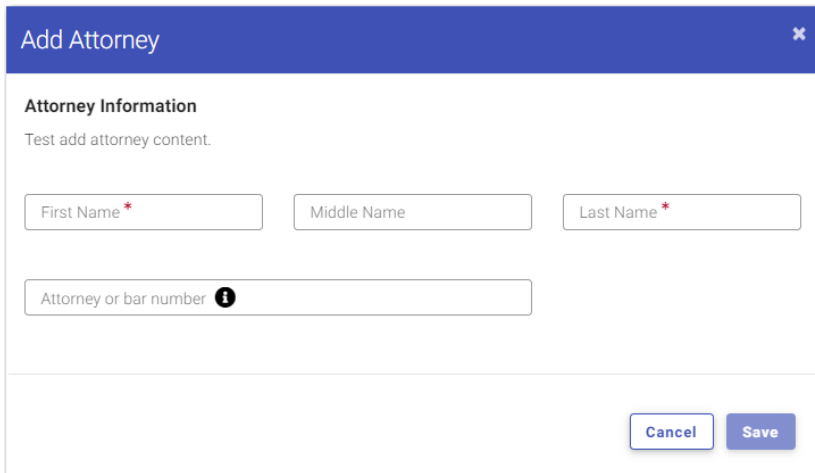


Figure 8.11 – Add Attorney Window

3. Type the name of the new attorney in the **First Name** and **Last Name** fields. If you know the middle name, type it in the **Middle Name** field.
4. Type the attorney’s bar number in the **Attorney or bar number** field.

5. Click  .



## Editing a Firm Attorney's Information

To edit a firm attorney's information:

1. On the Dashboard menu, click **Firm Attorneys**.


The *Firm Attorneys* page is displayed.

The screenshot shows the 'Firm Attorneys' page within a 'Firm Management' dashboard. The page features a table with the following data:

First Name	Last Name	Bar Number	
Tim	A	Andrews	1234
Tim	J	Andrews	1234
Harvey		Birdman	12
Abby		Carmichael	1234
Jon		Johnson	12345
Jerry		Jones	1234
			1234
Perry		Mason	1234
Jack		Stone	1234

The page also includes a '+ Add Attorney' button in the top right corner and a 'Support' button in the bottom left corner. The table has pagination controls at the bottom right showing '1 - 9 of 9'.

Figure 8.12 – Example of a Firm Attorneys Page

2. Locate the attorney for whom you want to change the information, and then click  .

The *Edit Attorney* window is displayed.

**Edit Attorney**

**Attorney Information**

Test edit attorney content.

First Name \* Tim


Middle Name A

Last Name \* Andrews

Attorney or bar number ⓘ 1234

Cancel Save

Figure 8.13 – Example of an Edit Attorney Window

3. Update the necessary information, and then click .

## Removing an Attorney from the Firm

To remove an attorney from the firm:

1. On the Dashboard menu, click **Firm Attorneys**.

The *Firm Attorneys* page is displayed.

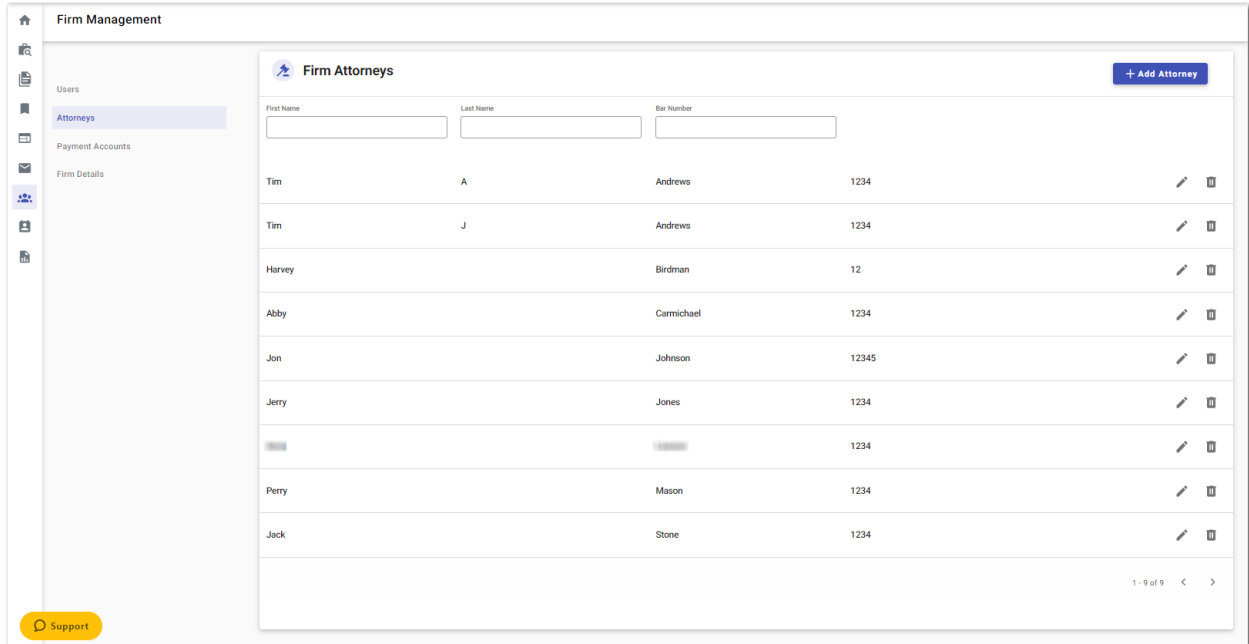

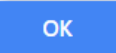

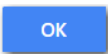


Figure 8.14 – Firm Attorneys Page

2. Locate the attorney that you want to remove from the firm, and then click  .

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

3. Click  to remove the attorney from the firm, or click  to cancel the action.

If you clicked , a confirmation message is displayed, and the attorney is removed from the firm.

# 9 Payment Accounts

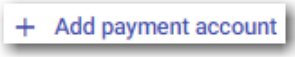
## Topics covered in this chapter

- ◆ Adding a Waiver Payment Account
- ◆ Adding a Credit Card Payment Account
- ◆ Adding an E-Check Payment Account
- ◆ Adding a Draw-Down Account
- ◆ Editing a Payment Account
- ◆ Deleting a Payment Account

You must set up a payment account before your firm can submit filings to the court.

You can set up a payment account from the Dashboard menu or from the *Fees* page while you are creating a filing.

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

To set up a payment account during a filing, click  on the *Fees* page. Then, follow the steps to create the payment account.

## Adding a Waiver Payment Account

To set up a waiver payment account:

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

The *Firm Payment Accounts* page is displayed.

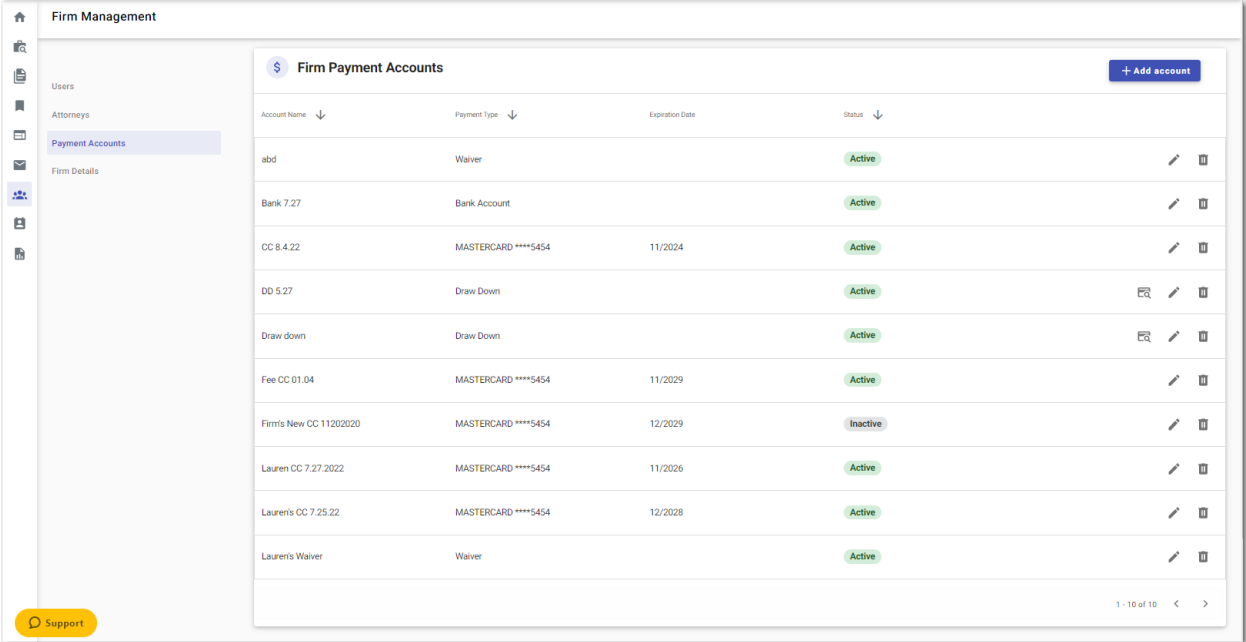


Figure 9.1 – Example of a Firm Payment Accounts Page

2. Click  .

The *Add Payment Account* window is displayed.

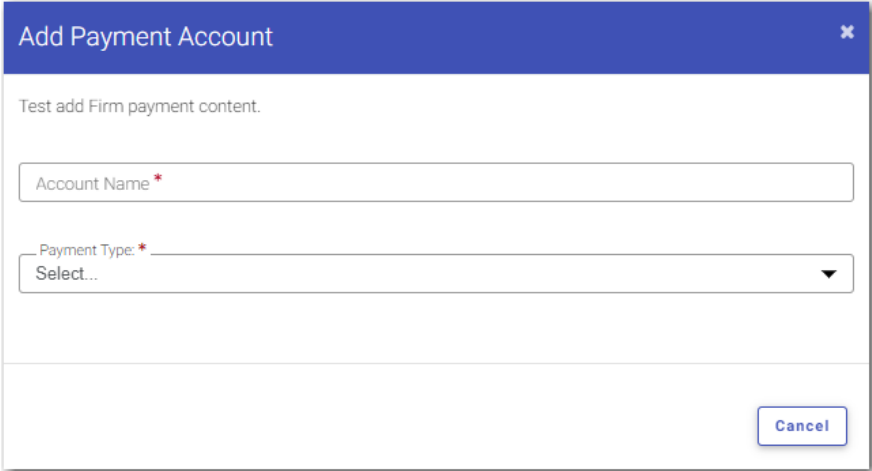
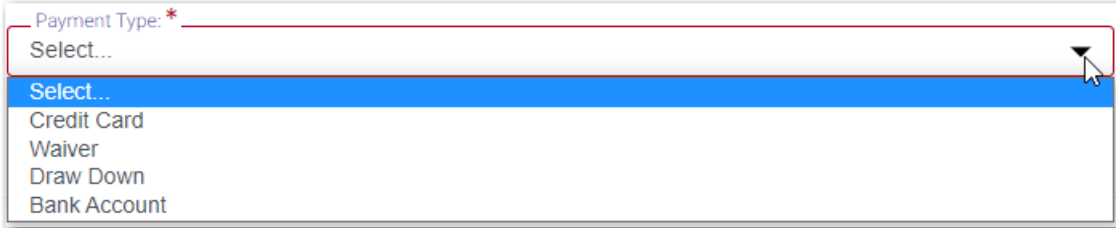


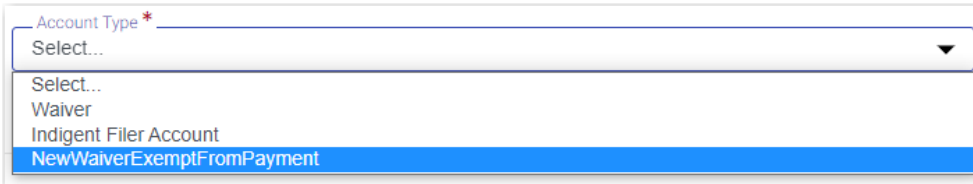
Figure 9.2 – Add Payment Account Window

- 3. Type a name for the payment account in the **Account Name** field.
- 4. Select **Waiver** from the **Payment Type** drop-down list.



**Figure 9.3 – Payment Type Drop-Down List**

5. Select **Waiver** or another option from the **Account Type** drop-down list.



**Figure 9.4 – Account Type Drop-Down List for Waivers**

6. Click  .

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

## Adding a Credit Card Payment Account


To set up a credit card payment account:

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

The *Firm Payment Accounts* page is displayed.

Account Name	Payment Type	Expiration Date	Status	
abd	Waiver		Active	
Bank 7.27	Bank Account		Active	
CC 8.4.22	MASTERCARD ****5454	11/2024	Active	
DD 5.27	Draw Down		Active	
Draw down	Draw Down		Active	
Fee CC 01.04	MASTERCARD ****5454	11/2029	Active	
Firm's New CC 11202020	MASTERCARD ****5454	12/2029	Inactive	
Lauren CC 7.27.2022	MASTERCARD ****5454	11/2026	Active	
Lauren's CC 7.25.22	MASTERCARD ****5454	12/2028	Active	
Lauren's Waiver	Waiver		Active	

Figure 9.5 – Example of a Firm Payment Accounts Page

2. Click .

The *Add Payment Account* window is displayed.

Add Payment Account

Test add Firm payment content.

Account Name \*

Payment Type: \*  
Select...

Cancel

Figure 9.6 – Add Payment Account Window

- Type a name for the payment account in the **Account Name** field.
- Select **Credit Card** from the **Payment Type** drop-down list.

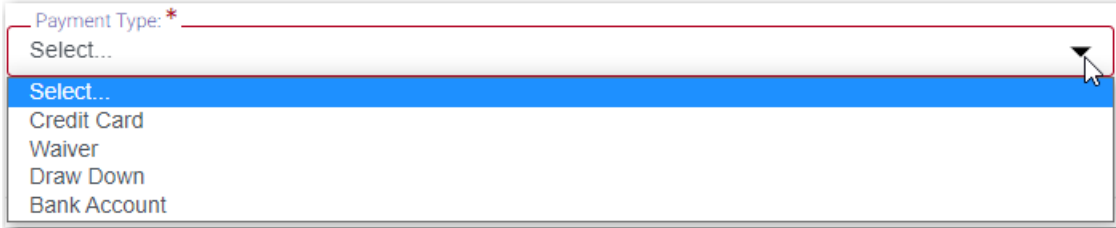



Figure 9.7 – Payment Type Drop-Down List

5. Click  .

The *Enter Information* window is displayed.

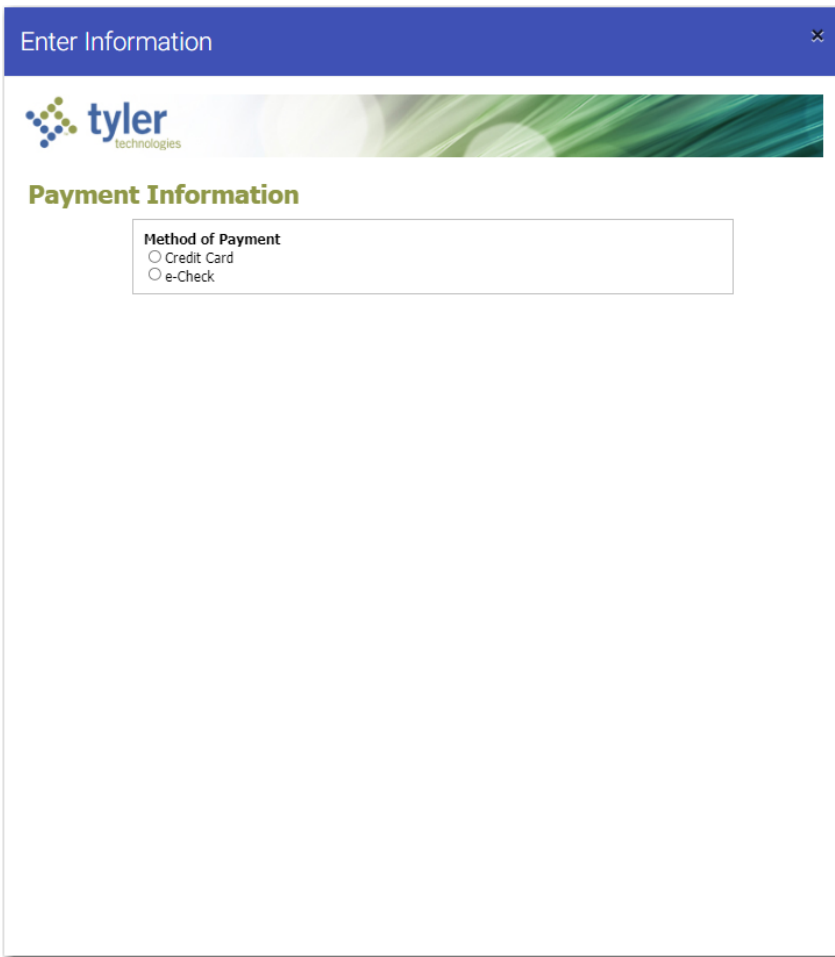


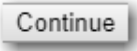
Figure 9.8 – Enter Information Window

6. Select **Credit Card**.

The Payment Information pane is displayed.



**Figure 9.9 – Payment Information Pane**

7. Select the card type from the **Card Type** drop-down list.
8. Type the card number in the **Card Number** field.
9. Type the expiration month of the credit card in the **Exp Month** field.
10. Type the year the credit card expires in the **Exp Year** field.
11. Type the Card Verification Value (CVV) code in the **CVV Code** field.
12. Type the cardholder's name in the **Name on Card** field.
13. Select the address type, and then complete the required address fields.
14. After completing all of the required fields, click  .

The Verify Billing Information pane is displayed.

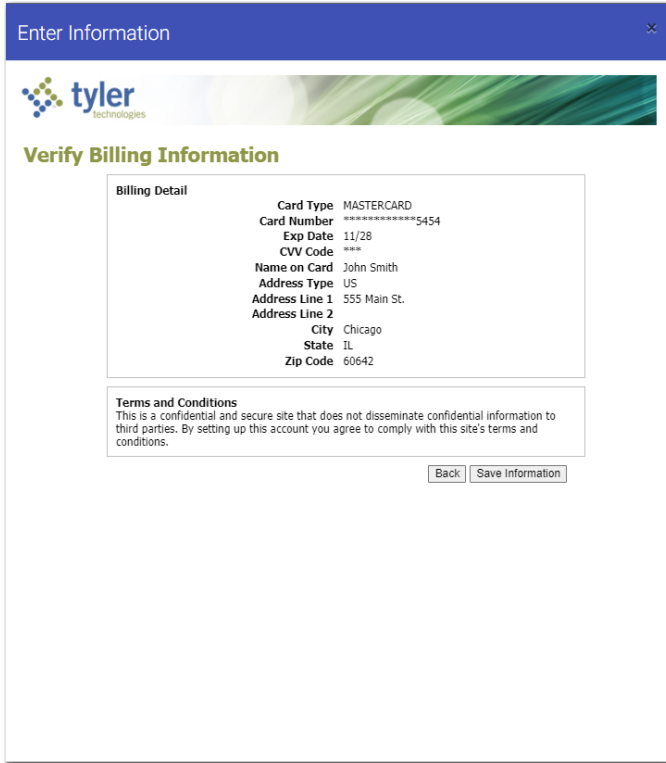

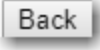


Figure 9.10 – Verify Billing Information Pane

15. Review the information you have entered. If it is correct, click . If it is not correct, click  and make any necessary changes.

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

## Adding an E-Check Payment Account

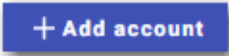
To set up an e-check payment account:

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

The *Firm Payment Accounts* page is displayed.

Account Name	Payment Type	Expiration Date	Status
abd	Waiver		Active
Bank 7.27	Bank Account		Active
CC 8.4.22	MASTERCARD ****5454	11/2024	Active
DD 5.27	Draw Down		Active
Draw down	Draw Down		Active
Fee CC 01.04	MASTERCARD ****5454	11/2029	Active
Firm's New CC 11202020	MASTERCARD ****5454	12/2029	Inactive
Lauren CC 7.27.2022	MASTERCARD ****5454	11/2026	Active
Lauren's CC 7.25.22	MASTERCARD ****5454	12/2028	Active
Lauren's Waiver	Waiver		Active

Figure 9.11 – Example of a Firm Payment Accounts Page

2. Click  .

The *Add Payment Account* window is displayed.

Figure 9.12 – Add Payment Account Window

- Type a name for the payment account in the **Account Name** field.
- Select **Bank Account** from the **Payment Type** drop-down list.

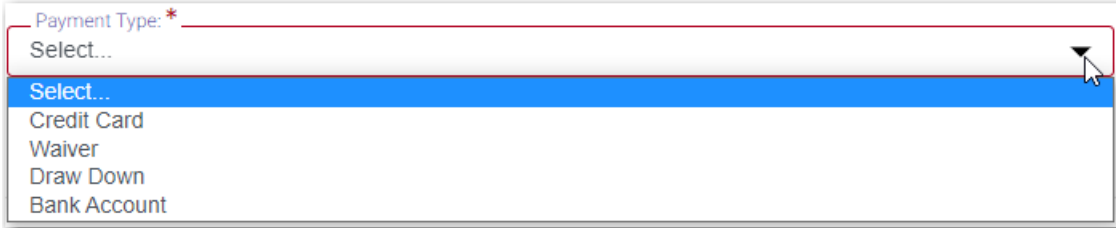



Figure 9.13 – Payment Type Drop-Down List

5. Click  .

The *Enter Information* window is displayed.

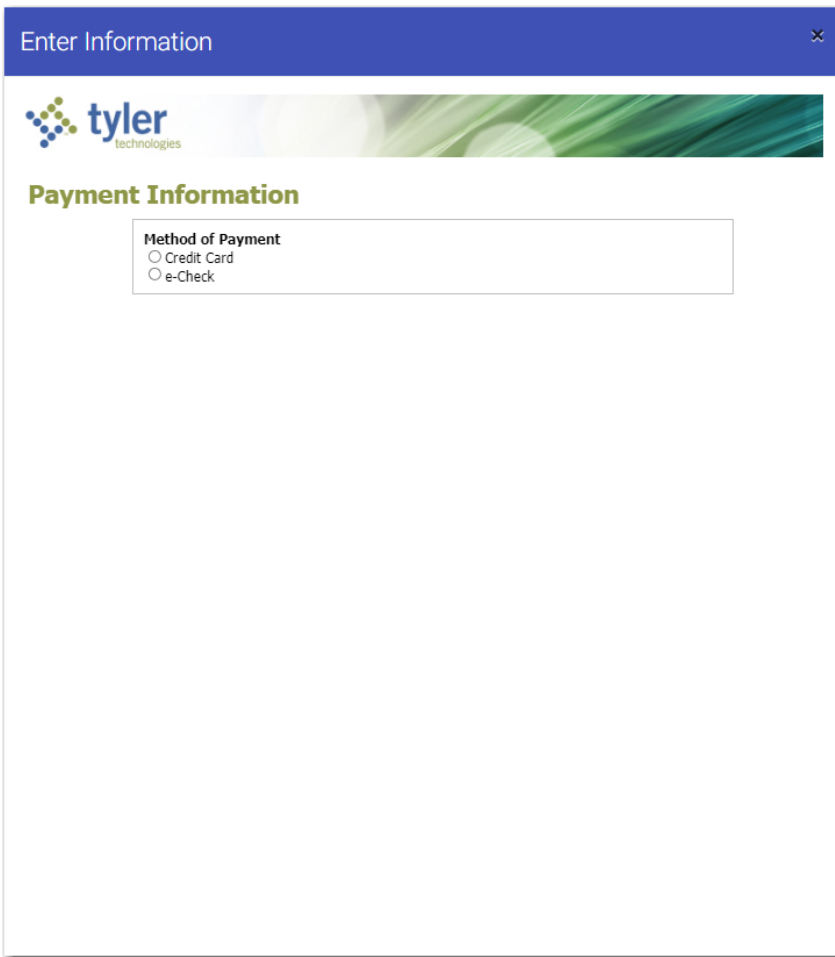



Figure 9.14 – Enter Information Window

6. Select **e-Check**.

The Payment Information pane is displayed.

Figure 9.15 – Payment Information Pane

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

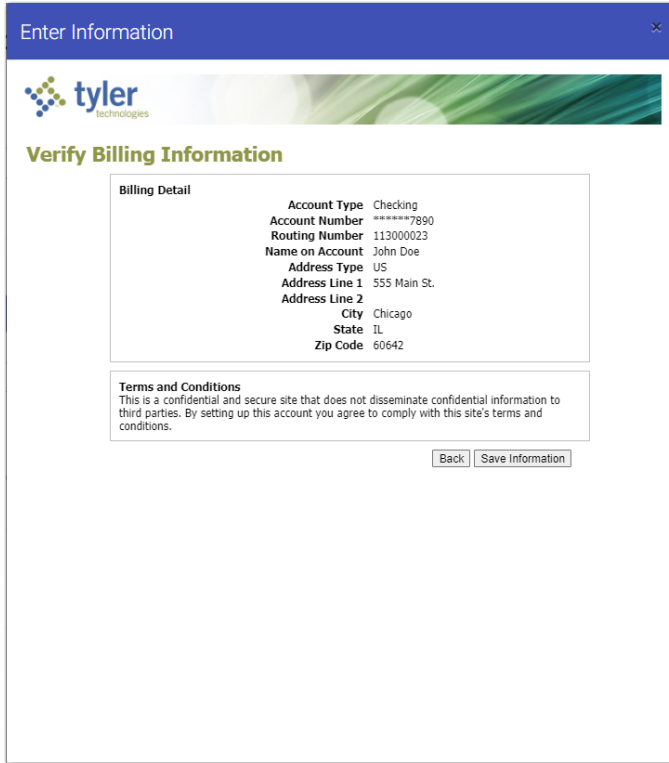

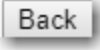


Figure 9.16 – Verify Billing Information Pane

13. Review the information you have entered. If it is correct, click . If it is not correct, click  and make any necessary changes.

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

## Adding a Draw-Down Account

You can create a draw-down account on the *Payment Accounts* page for use at a later time, or you can create a draw-down account on the *Fees* page during a case filing.

To add a draw-down account from the *Payment Accounts* page:

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

The *Firm Payment Accounts* page is displayed.

Account Name	Payment Type	Expiration Date	Status	
abd	Waiver		Active	
Bank 7.27	Bank Account		Active	
CC 8.4.22	MASTERCARD ****5454	11/2024	Active	
DD 5.27	Draw Down		Active	
Draw down	Draw Down		Active	
Fee CC 01.04	MASTERCARD ****5454	11/2029	Active	
Firm's New CC 11202020	MASTERCARD ****5454	12/2029	Inactive	
Lauren CC 7.27.2022	MASTERCARD ****5454	11/2026	Active	
Lauren's CC 7.25.22	MASTERCARD ****5454	12/2028	Active	
Lauren's Waiver	Waiver		Active	

Figure 9.17 – Example of a Firm Payment Accounts Page

2. Click .

The *Add Payment Account* window is displayed.

Add Payment Account

Test add Firm payment content.

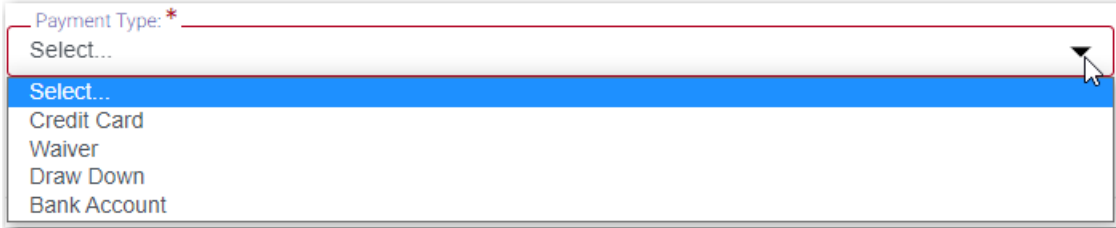
Account Name \*

Payment Type: \*  
Select...

Cancel

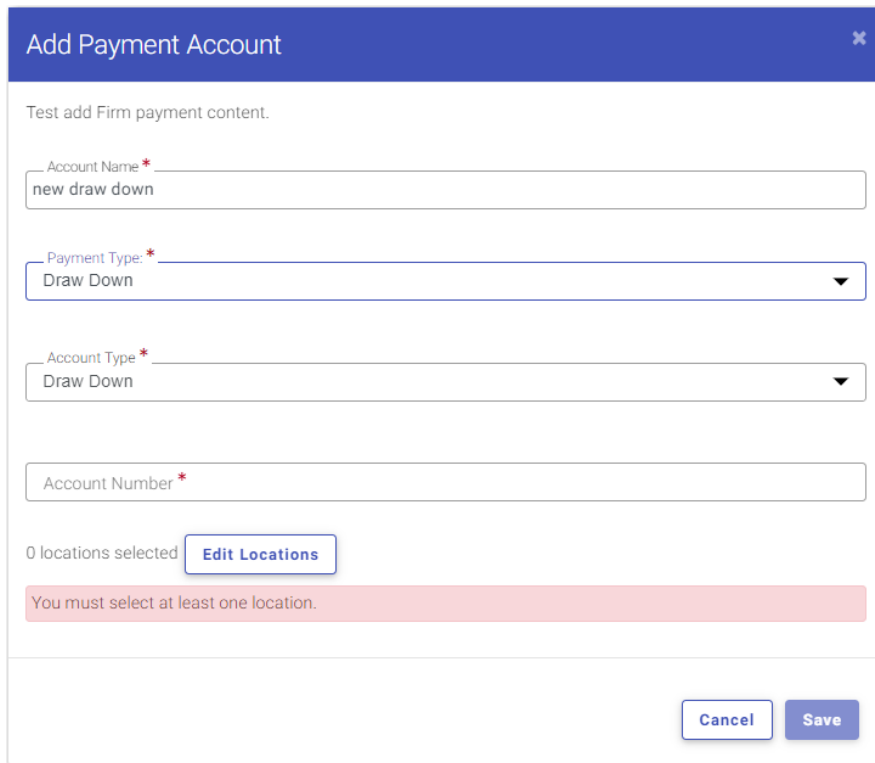
Figure 9.18 – Add Payment Account Window

- Type a name for the payment account in the **Account Name** field.
- Select **Draw Down** from the **Payment Type** drop-down list.



**Figure 9.19 – Payment Type Drop-Down List**

Additional fields are displayed in the *Add Payment Account* window.



**Figure 9.20 – Additional Fields in the Add Payment Account Window**

5. Select **Draw Down** from the **Account Type** drop-down list.
6. Type an account number in the **Account Number** field.

7. Click  .

The *Edit locations for new draw down* window is displayed.



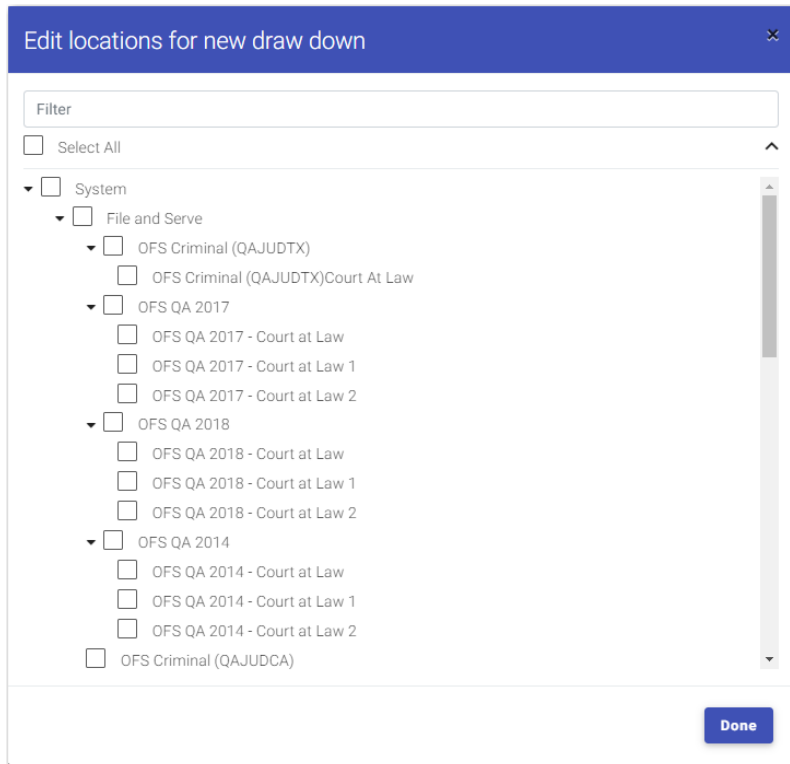


Figure 9.21 – Example of the Edit Locations for New Draw Down Window

8. Select the locations where the draw-down account can be used, and then click



Figure 9.22 – Example of an Add Payment Account Window with the New Draw-Down Account Created

9. Click  .

The *Balance for Draw down* window is displayed.

Location	Balance	Minimum Balance
OFS QA 2017	\$24,026.15	\$1,000.00
OFS QA 2017 - Court at Law	\$24,026.15	\$1,000.00
OFS QA 2017 - Court at Law 1	\$24,026.15	\$1,000.00
OFS QA 2017 - Court at Law 2	\$24,026.15	\$1,000.00

Figure 9.23 – Example of a Balance for Draw Down Window

Note: You can click  from the *Firm Payment Accounts* page to view the draw-down balance for a specified payment account.

10. Verify the amount for the location that you selected. Then, click

**Close**

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

## Editing a Payment Account

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

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

To change the status or the name of an existing payment account:

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

The *Firm Payment Accounts* page is displayed.

Account Name	Payment Type	Expiration Date	Status	
abd	Waiver		Active	
Bank 7.27	Bank Account		Active	
CC 8.4.22	MASTERCARD ****5454	11/2024	Active	
DD 5.27	Draw Down		Active	
Draw down	Draw Down		Active	
Fee CC 01.04	MASTERCARD ****5454	11/2029	Active	
Firm's New CC 11/20/2020	MASTERCARD ****5454	12/2029	Inactive	
Lauren CC 7.27.2022	MASTERCARD ****5454	11/2026	Active	
Lauren's CC 7.25.22	MASTERCARD ****5454	12/2028	Active	
Lauren's Waiver	Waiver		Active	

**Figure 9.24 – Example of a Firm Payment Accounts Page**


2. Locate the payment account for which you want to change the status or the name, and then click



The *Edit Payment Account* window is displayed.

**Figure 9.25 – Example of an Edit Payment Account Window**

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

- To change the status to Inactive, clear the **Active** check box. If you want to change the name of the account, type the new name in the **Account Name** field. Then, click .

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

- To return the payment account to the Active status, click , and then select the **Active** check box. Then, click .

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

## Deleting a Payment Account

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

To delete an existing payment account:

- On the Dashboard menu, click **Firm Payment Accounts**.


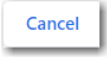
The *Firm Payment Accounts* page is displayed.

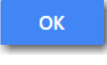
Account Name	Payment Type	Expiration Date	Status	
abd	Waiver		Active	
Bank 7.27	Bank Account		Active	
CC 8.4.22	MASTERCARD ****5454	11/2024	Active	
DD 5.27	Draw Down		Active	
Draw down	Draw Down		Active	
Fee CC 01.04	MASTERCARD ****5454	11/2029	Active	
Firm's New CC 11/20/2020	MASTERCARD ****5454	12/2029	Inactive	
Lauren CC 7.27.2022	MASTERCARD ****5454	11/2026	Active	
Lauren's CC 7.25.22	MASTERCARD ****5454	12/2028	Active	
Lauren's Waiver	Waiver		Active	

Figure 9.26 – Example of a Firm Payment Accounts Page

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

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

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

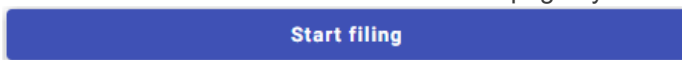
If you clicked , a confirmation message is displayed, and the account is deleted.

# 10 Case Initiation

## Topics covered in this chapter

- ◆ Starting a New Case Filing
- ◆ Entering Case Information
- ◆ Adding Envelope Level Comments to a Case Filing
- ◆ Collecting Address Information at the Case Level
- ◆ Entering Case Information for a Civil Case
- ◆ Filing a New Case with Case Cross References
- ◆ Filing a New Case with a Will Filed Date
- ◆ Entering Party Details
- ◆ Entering Date of Death on the Parties Page
- ◆ Entering Filing Details
- ◆ Merging Documents for File Upload in a Case Filing
- ◆ Entering a Filing with an Ad Damnum Amount
- ◆ Entering a Filing with a Motion Type Code
- ◆ Entering a Filing with a Claim Amount
- ◆ Entering a Filing with an Estate Value
- ◆ Entering Payment Information
- ◆ Capability for Filing a Return Date
- ◆ Selecting a Return Date for a Case Filing
- ◆ Reverify the Return Date
- ◆ Reverifying a Return Date
- ◆ Submission Agreements
- ◆ Viewing the Envelope Summary
- ◆ Viewing Case Address Information on the Summary Page
- ◆ View Case Judicial Officer
- ◆ Capability for Hearing Dates
- ◆ Scheduling a Hearing Date for a New Case Filing
- ◆ Scheduling a Hearing for an Existing Case Filing

You can initiate a case from the *Dashboard* page by clicking



. This action begins the case initiation process for e-filing. From here, you can start a new case or file into an existing case.



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

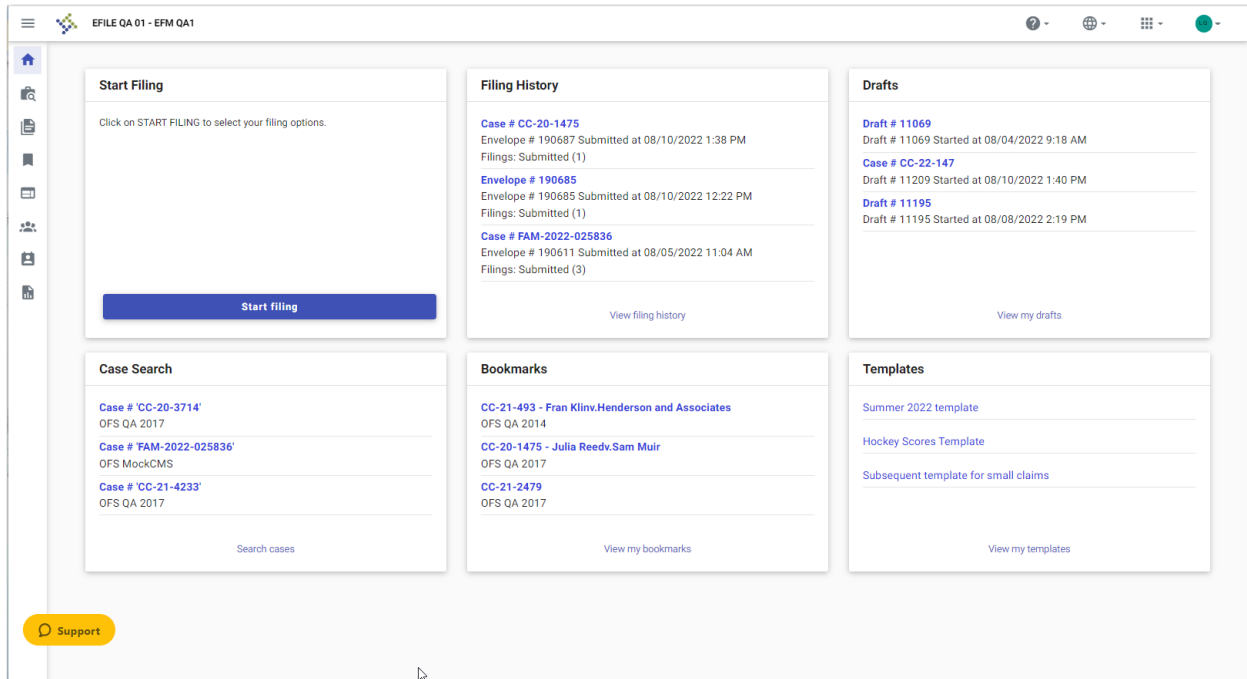


Figure 10.1 – Example of a Dashboard Page

## Starting a New Case Filing

Start a new case filing from the *Dashboard* page.

To start a new case filing:

1. On the *Dashboard* page, click

**Start filing**

The *Start Filing* page is displayed.

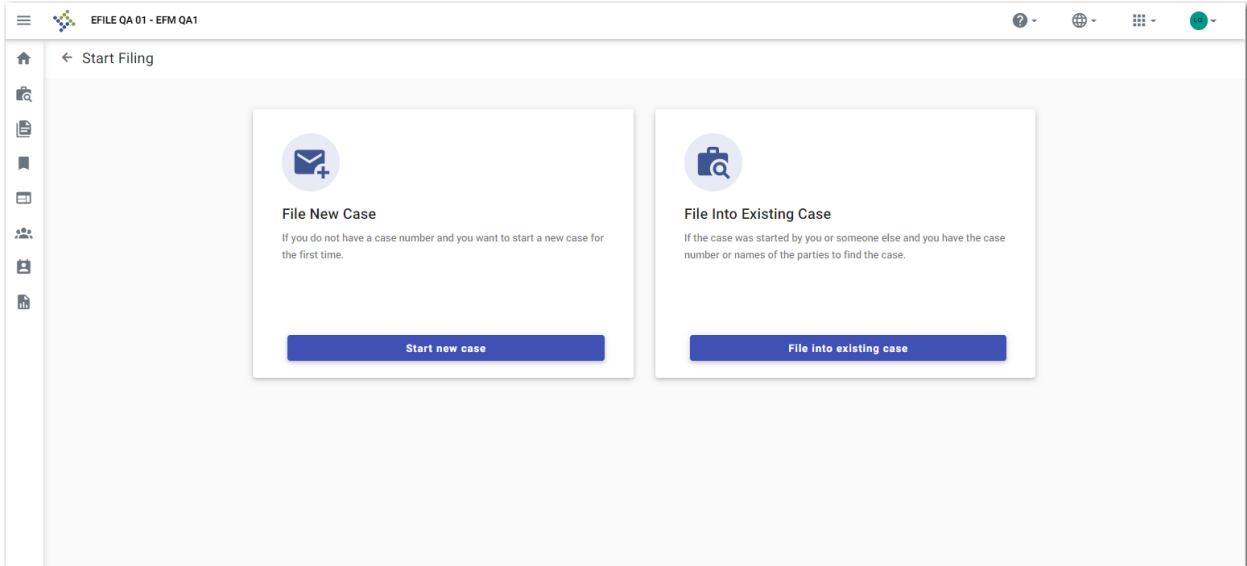


Figure 10.2 – Start Filing Page

2. Click .

The *Case Information* page is displayed.

## Entering Case Information

You must have a payment account to create a filing. You can set up a payment account in advance, or you can create an account from the *Fees* page.

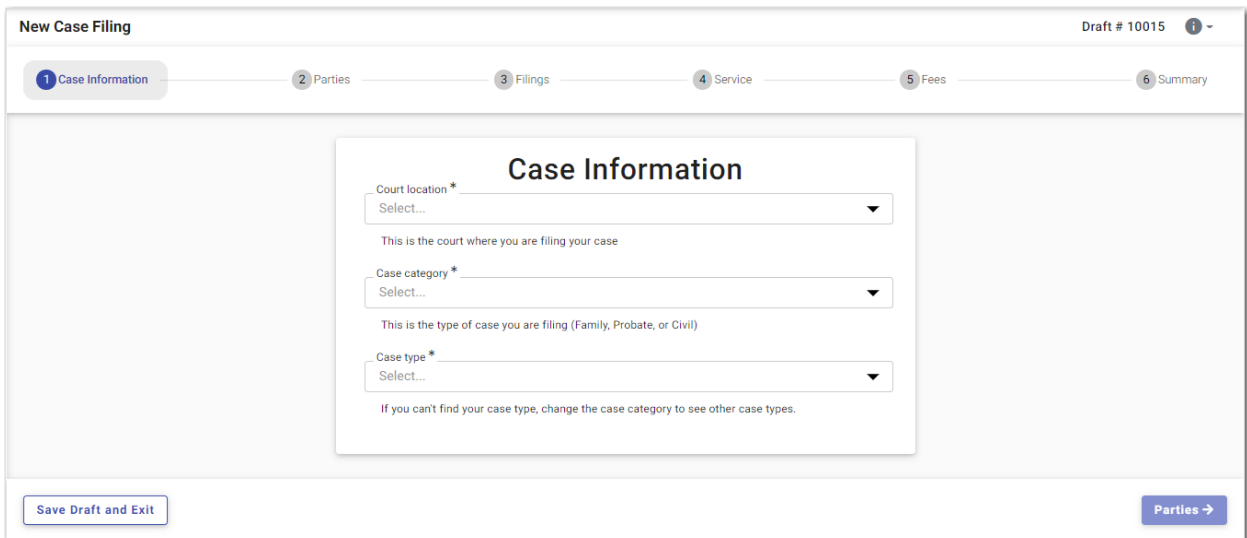


Figure 10.3 – Case Information Page


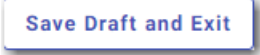
**Note:** While you are entering a case filing, click  to view the case number or draft number.



To enter case information:

1. On the *Case Information* page, select the location from the **Court Location** drop-down list.
2. Select the case category from the **Case Category** drop-down list.
3. Select the case type from the **Case Type** drop-down list.
4. Select the case subtype, if applicable, from the **Case Sub Type** drop-down list.

**Note: The Case Sub Type field is configured by Tyler and may not be available on your system.**

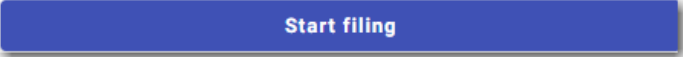
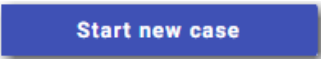
5. Click  to save your work and continue, or click  to save your filing and continue it at another time.

## Adding Envelope Level Comments to a Case Filing

You can add envelope level comments on the *Case Information* page during filing creation. The comments are then displayed on the *Summary* page, in the print preview, and in the envelope details.

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

To add envelope level comments to a case filing:

1. On the *Dashboard* page, click .  
The *Start Filing* page is displayed.
2. Click .  
The *Case Information* page is displayed.

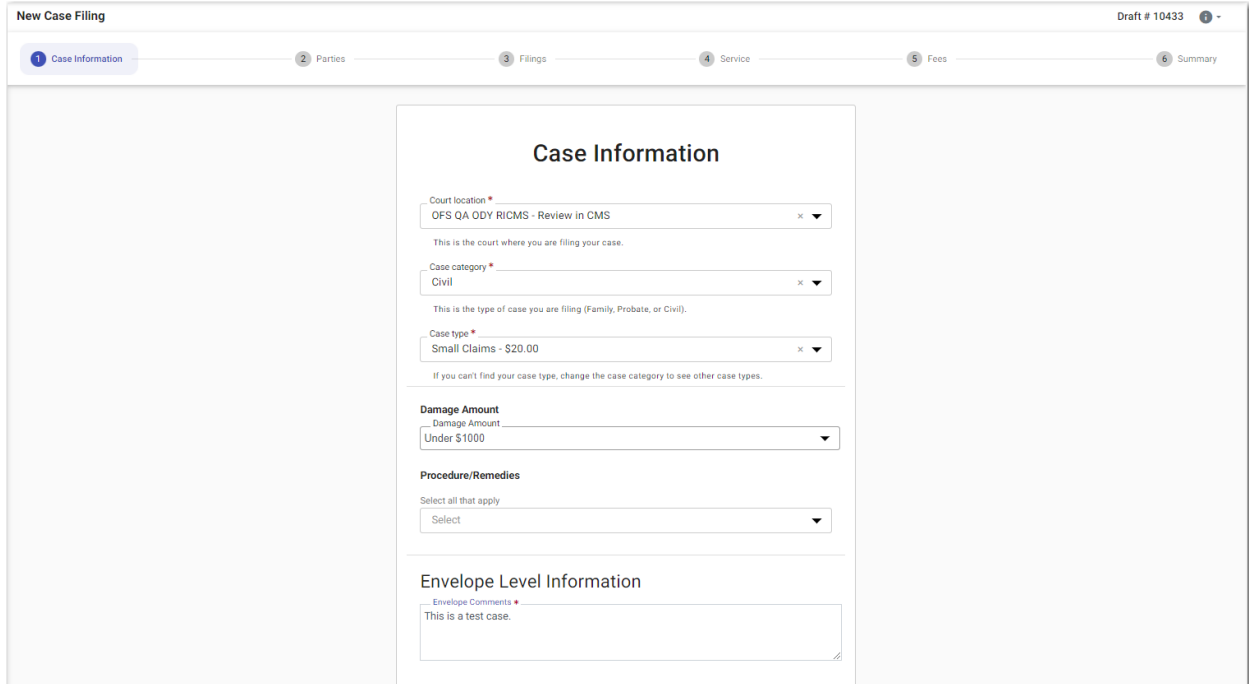


Figure 10.4 – Example of a Case Information Page

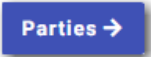
3. Select the location from the **Court Location** drop-down list.
4. Select the case category from the **Case Category** drop-down list.
5. Select the case type from the **Case Type** drop-down list.
6. Select the amount of damages you are seeking from the **Damage Amount** drop-down list.

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

7. Select the appropriate procedures or remedies from the **Procedure/Remedies** drop-down list.

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

8. In the Envelope Level Information pane, in the **Envelope Comments** field, type the comments that you want to attach to the case filing.

9. Click  to continue with your case filing.

# Collecting Address Information at the Case Level

When filers create certain types of cases, they can provide address information in the case filing.

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

The screenshot shows a web interface for 'New Case Filing'. At the top right, it says 'Draft # 10383'. Below the title bar is a progress indicator with six steps: 1. Case Information (active), 2. Parties, 3. Filings, 4. Service, 5. Fees, and 6. Summary. The main content area is titled 'Case Information' and contains several sections:

- Court location \***: A dropdown menu with 'OFS QA 2017' selected. Below it is a note: 'This is the court where you are filing your case. <https://www.hcdistrictclerk.com/Common/Civil/EFiling.aspx>'
- Case category \***: A dropdown menu with 'Civil' selected. Below it is a note: 'This is the type of case you are filing (Family, Probate, or Civil)'.
- Case type \***: A dropdown menu with 'Notice Of Removal' selected. Below it is a note: 'If you can't find your case type, change the case category to see other case types.'
- Damage Amount**: A dropdown menu with 'Select...' selected.
- Procedure/Remedies**: A section with the instruction 'Select all that apply' and a dropdown menu with 'Select' selected.
- Case Address**: A section with several fields:
  - Country \***: A dropdown menu with 'United States' selected.
  - Address Line 1 \***: A text input field.
  - City \***: A text input field.
  - State \***: A dropdown menu with 'Select...' selected.
  - Zip Code \***: A text input field.
  - County \***: A text input field.

**Figure 10.5 – Example of a Case Information Page—Blank Case Address Pane**



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


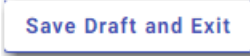
To collect address information at the case level:

1. On the *Case Information* page, select the location from the **Court Location** drop-down list.
2. Select the case category from the **Case Category** drop-down list.
3. Select the case type from the **Case Type** drop-down list.
4. In the Case Address pane, complete all of the required address fields.

The screenshot shows a web application window titled "New Case Filing" with a draft number of 10383. The interface has a top navigation bar with tabs for "Case Information", "Parties", "Filings", "Service", "Fees", and "Summary". The "Case Information" tab is active. The main content area is titled "Case Information" and contains several sections:

- Court location \***: A dropdown menu with "OFS QA 2017" selected. Below it is a URL: <https://www.hcdistrictclerk.com/Common/Civil/EFiling.aspx>.
- Case category \***: A dropdown menu with "Civil" selected. Below it is a note: "This is the type of case you are filing (Family, Probate, or Civil)."
- Case type \***: A dropdown menu with "Notice Of Removal" selected. Below it is a note: "If you can't find your case type, change the case category to see other case types."
- Damage Amount**: A dropdown menu with "Select..." selected.
- Procedure/Remedies**: A dropdown menu with "Select" selected. Above it is the text "Select all that apply".
- Case Address**: A section with multiple fields:
  - Country \***: A dropdown menu with "United States" selected.
  - Address Line 1 \***: A text input field containing "555 Main Street".
  - City \***: A text input field containing "Dallas".
  - State \***: A dropdown menu with "Texas" selected.
  - Zip Code \***: A text input field containing "75231".
  - Country \***: A text input field containing "Dallas".

Figure 10.6 – Example of a Case Information Page—Completed Case Address Pane

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

## Entering Case Information for a Civil Case

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

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


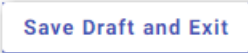
To enter case information:

1. Select the location from the **Court Location** drop-down list.
2. Select **Civil** from the **Case Category** drop-down list.

Figure 10.7 – Example of a Case Information Page

3. Select the case type from the **Case Type** drop-down list.
4. Select the amount of damages you are seeking from the **Damage Amount** drop-down list.
5. Select the appropriate procedures or remedies from the **Procedure/Remedies** drop-down list.

Figure 10.8 – Example of a Completed Case Information Page

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

## Filing a New Case with Case Cross References

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

**Note: The Case Cross Reference Number feature is configured by Tyler and may not be available on your system.**

**Figure 10.9 – Example of a Case Information Page with the Case Cross Reference Section Displayed**

To file a new case that uses case cross references:

1. Select the location from the **Court Location** drop-down list.
2. Select **Civil** from the **Case Category** drop-down list.
3. Select the appropriate case type from the **Case Type** drop-down list.
4. Select the case subtype, if applicable, from the **Case Sub Type** drop-down list.
5. Select the damages amount, if applicable, from the **Damage Amount** drop-down list.
6. In the Case Cross Reference pane, type the case cross reference number in the **Case cross reference Id** field.

**Note: Some case cross reference types require a six-digit number. Other types may require a four-digit number.**

7. If you have additional case cross reference numbers to add, click

**+ Add More**

Another row for case cross references is displayed.

8. Continue adding case cross reference numbers until you are done.

Figure 10.10 – Example of a Case Information Page with Case Cross Reference Numbers Added

9. Click **Parties →** to save your work and continue, or click **Save Draft and Exit** to save your work and exit the filing.

## Filing a New Case with a Will Filed Date

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

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

To file a new case and enter the date on which a will was filed:

1. On the *Dashboard* page, click **Start filing**.  
The *Start Filing* page is displayed.

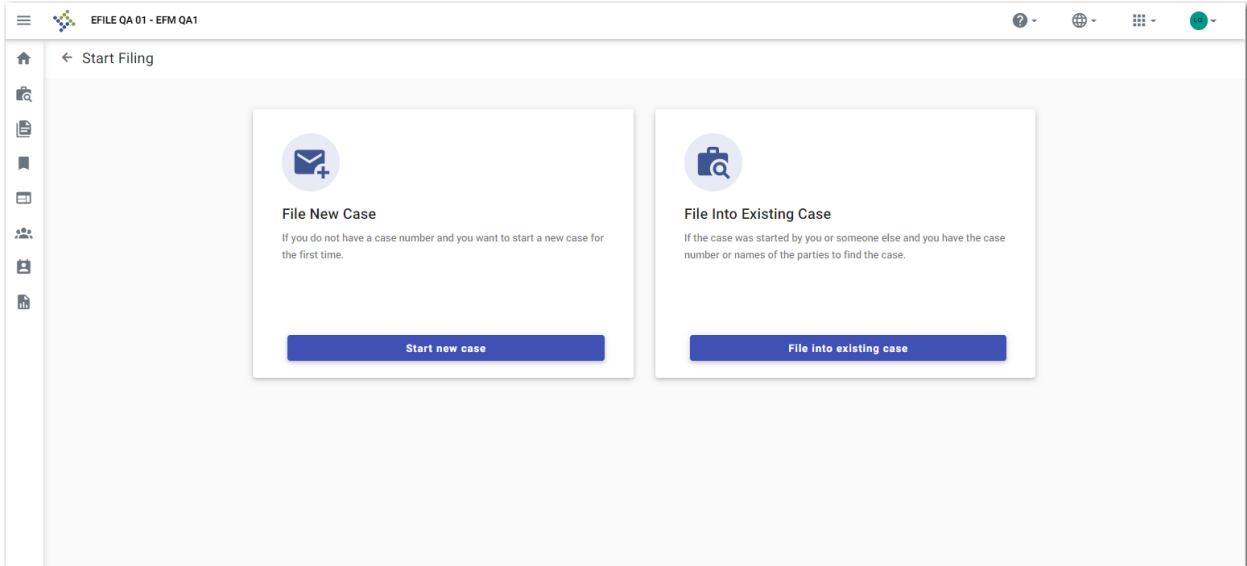
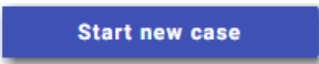


Figure 10.11 – Start Filing Page

2. Click .
- The *Case Information* page is displayed.

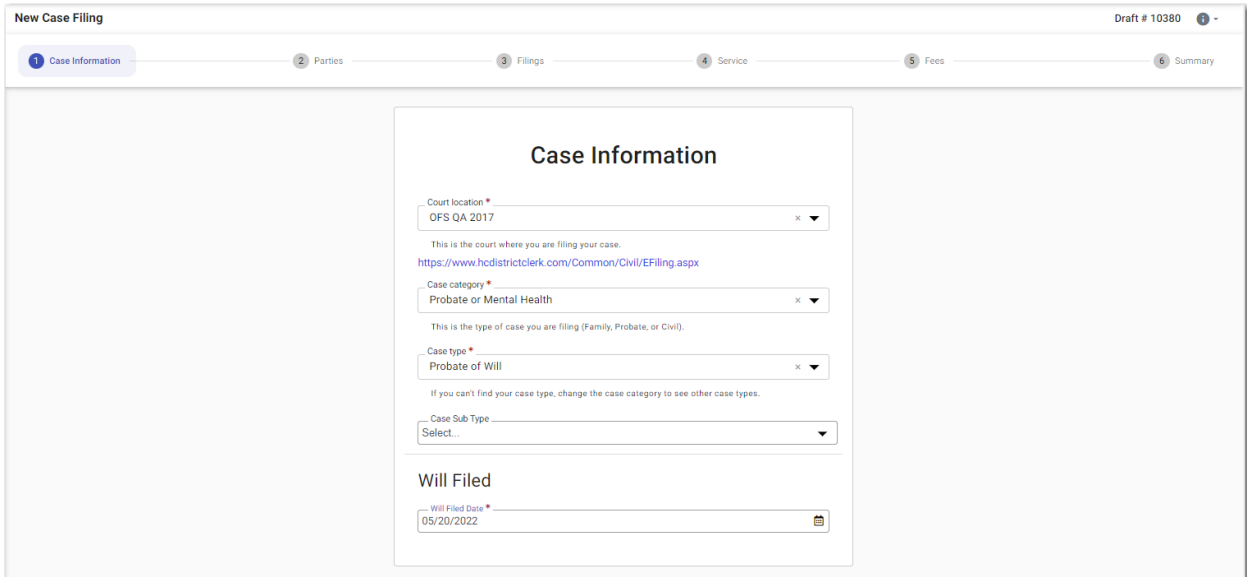


Figure 10.12 – Example of the Will Filed Field on the Case Information Page

3. Select the location from the **Court Location** drop-down list.
4. Select the category from the **Case Category** drop-down list.  
**Note: In the example, “Probate or Mental Health” is selected.**
5. Select the case type from the **Case Type** drop-down list.  
**Note: In the example, “Probate of Will” is selected.**



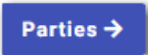
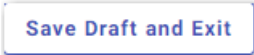
**Note: The category and case type that you select determine which fields will be displayed next.**

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

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

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

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

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

## Entering Party Details

Each case requires a party type.

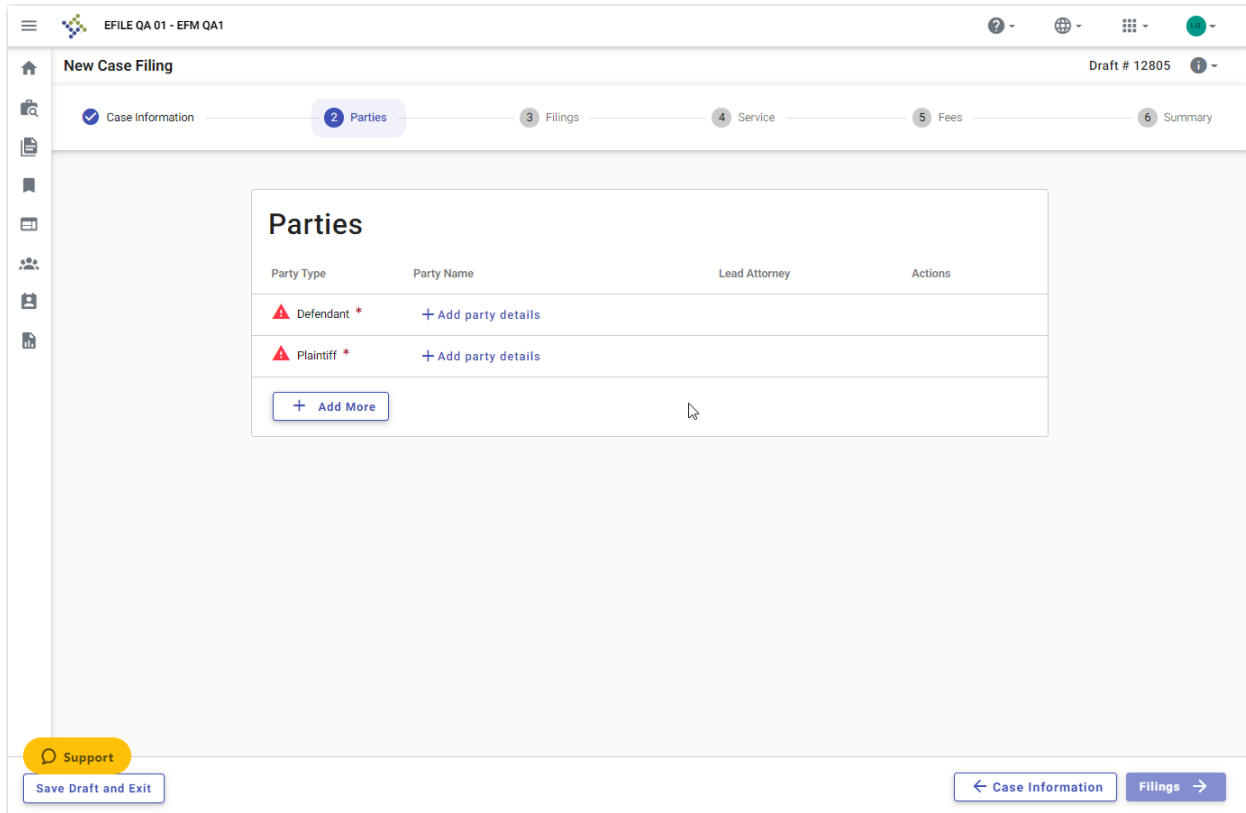


Figure 10.13 – Example of a Parties Page

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

To enter the details for the parties involved in the case:

1. On the *Parties* page, select the party type that you want to begin to describe, and then click



The *Edit Party Details* window for the specified party is displayed.

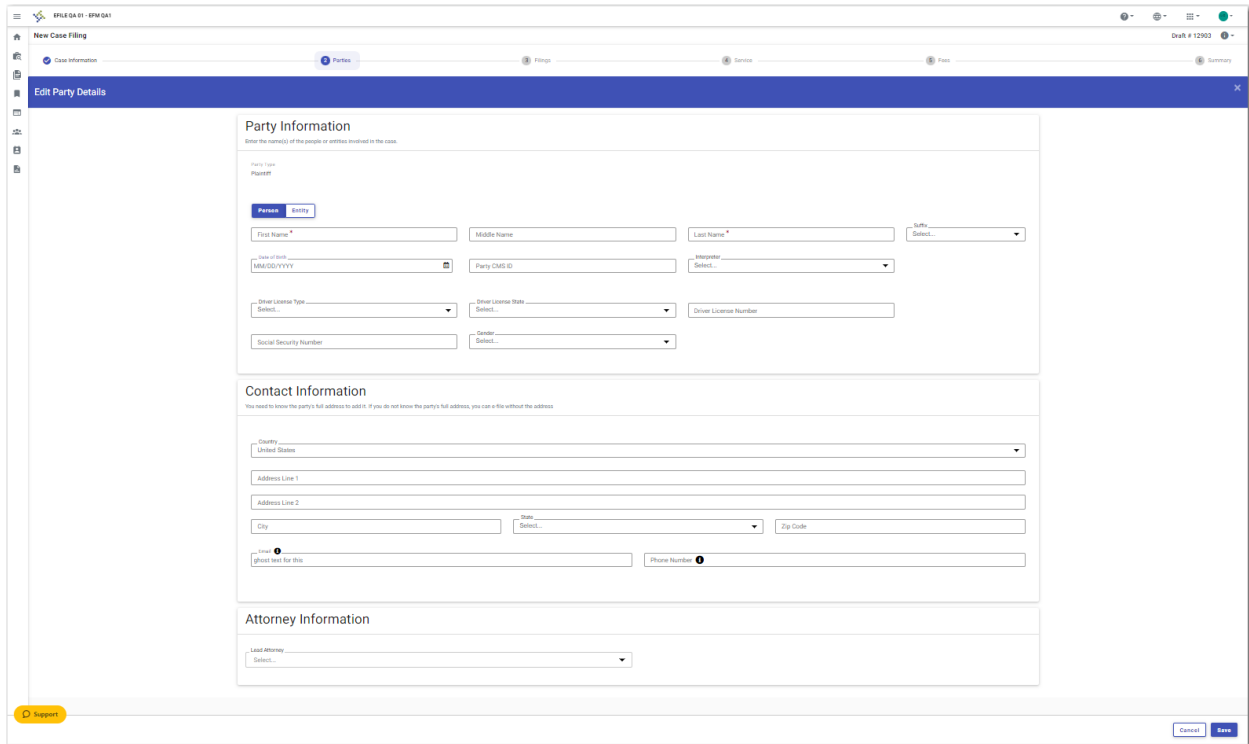



Figure 10.14 – Example of the Edit Party Details Window

2. Click either  or .

**Note: The following steps describe the fields that are displayed if you select “Person.”**

3. In the Party Information pane, complete the **First Name**, **Middle Name** (if applicable), and **Last Name** fields. Also, if appropriate, select the party’s suffix from the **Suffix** drop-down list.
4. Type the party’s date of birth in the **Date of Birth** field, or click  to select the date from the calendar.
5. Type the party case management system identification (ID) in the **Party CMS ID** field, if appropriate.
6. Select a language from the **Interpreter** drop-down list, if appropriate.
7. Select the type of driver’s license from the **Drivers License Type** drop-down list.
8. Select the state where the driver’s license was issued from the **Drivers License State** drop-down list.
9. Type the party’s driver’s license number in the **Drivers License Number** field.
10. Type the party’s Social Security number in the **Social Security Number** field.

**Note: After you type the Social Security number, asterisks are displayed to hide the number.**

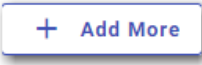
11. Select the party’s gender from the **Gender** drop-down list.
12. In the Contact Information pane, enter the country, address, city, state, ZIP code, and phone number for the specified party.
13. In the Attorney Information pane, from the **Lead Attorney** drop-down list, select the filing attorney.
14. From the next field that is displayed, select additional attorneys, if any, that you want to add to the case.

15. After all of the required fields for the specified party are completed, click



16. On the *Parties* page, complete the party information for the next party.

17. If you have another party to add to the case, click



18. Click



## Entering Date of Death on the Parties Page

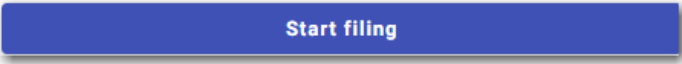
You can enter the date of death for a party when the Date of Death feature is configured on your system.

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

**Note: Your screens may vary from the examples provided.**

To enter the date of death on the *Parties* page:

1. On the *Dashboard* page, click



The *Start Filing* page is displayed.

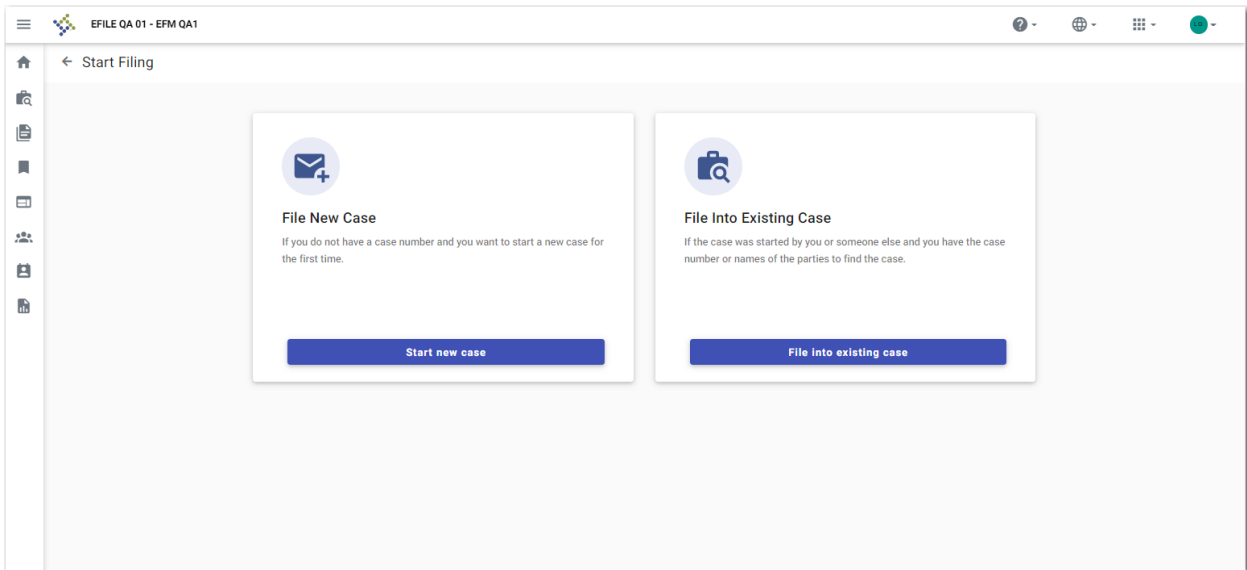


Figure 10.15 – Start Filing Page

2. Click



The *Case Information* page is displayed.



- Complete the required sections on the *Case Information* page, and then click **Parties**.  
The *Parties* page is displayed.

- On the *Parties* page, select the party type that you want to begin to describe, and then click **+ Add party details**.

The *Edit Party Details* window for the specified party is displayed.


Figure 10.16 – Example of the Edit Party Details Window

- Click either **Person** or **Entity**.



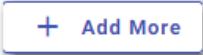

**Note:** The following steps describe the fields that are displayed if you select “Person.”

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

- In the Party Information pane, complete the **First Name**, **Middle Name** (if applicable), and **Last Name** fields. Also, if appropriate, select the party’s suffix from the **Suffix** drop-down list.

- Type the deceased party’s birth date in the **Date of Birth** field, or click  to select the date from the calendar.
- Type the party case management system identification (ID) in the **Party CMS ID** field, if appropriate.
- Select a language from the **Interpreter** drop-down list, if appropriate.
- Select the type of driver’s license from the **Drivers License Type** drop-down list.
- Select the state where the driver’s license was issued from the **Drivers License State** drop-down list.
- Type the party’s driver’s license number in the **Drivers License Number** field.
- Type the party’s Social Security number in the **Social Security Number** field.

**Note: After you type the Social Security number, asterisks are displayed to hide the number.**

- 14. Select the deceased party's gender from the **Gender** drop-down list.
- 15. Type the deceased party's date of death in the **Date of Death** field, or click  to select a date from the calendar.
- 16. In the Contact Information pane, enter the country, address, city, state, ZIP code, and phone number for the specified party.
- 17. In the Attorney Information pane, from the **Lead Attorney** drop-down list, select the filing attorney.
- 18. From the next field that is displayed, select additional attorneys, if any, that you want to add to the case.
- 19. After all of the required fields for the specified party are completed, click .
- 20. On the *Parties* page, if you have another party to add to the case, click . Then, complete the party information for the next party.
- 21. Continue to add parties until all of the parties have been added to the case.
- 22. Click  to save your work and continue.

# Entering Filing Details

You can enter the filing details on the *Filings* page.

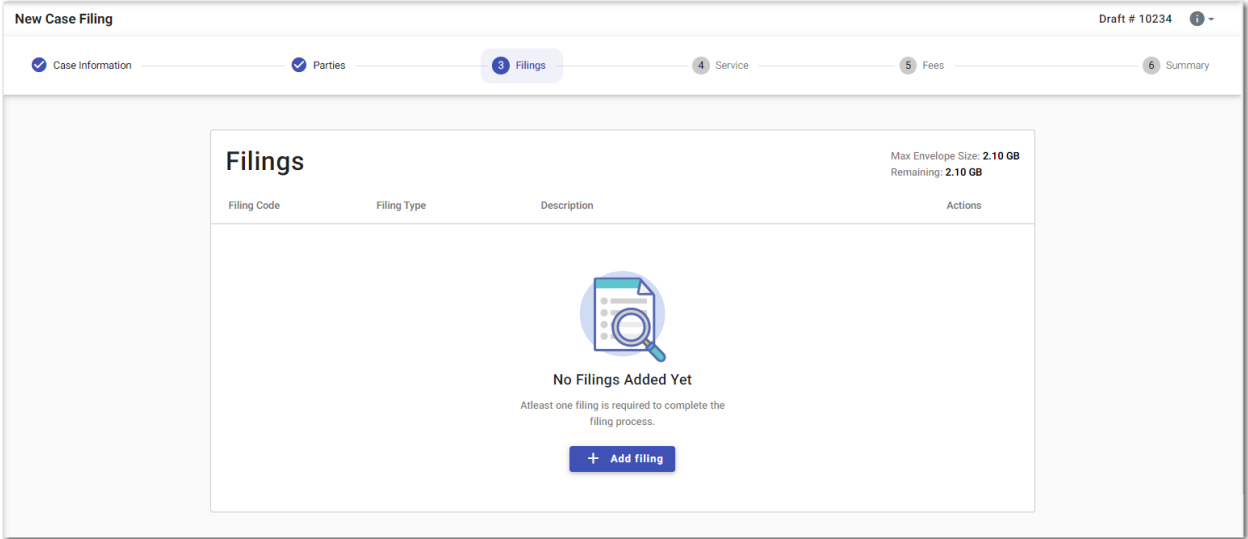



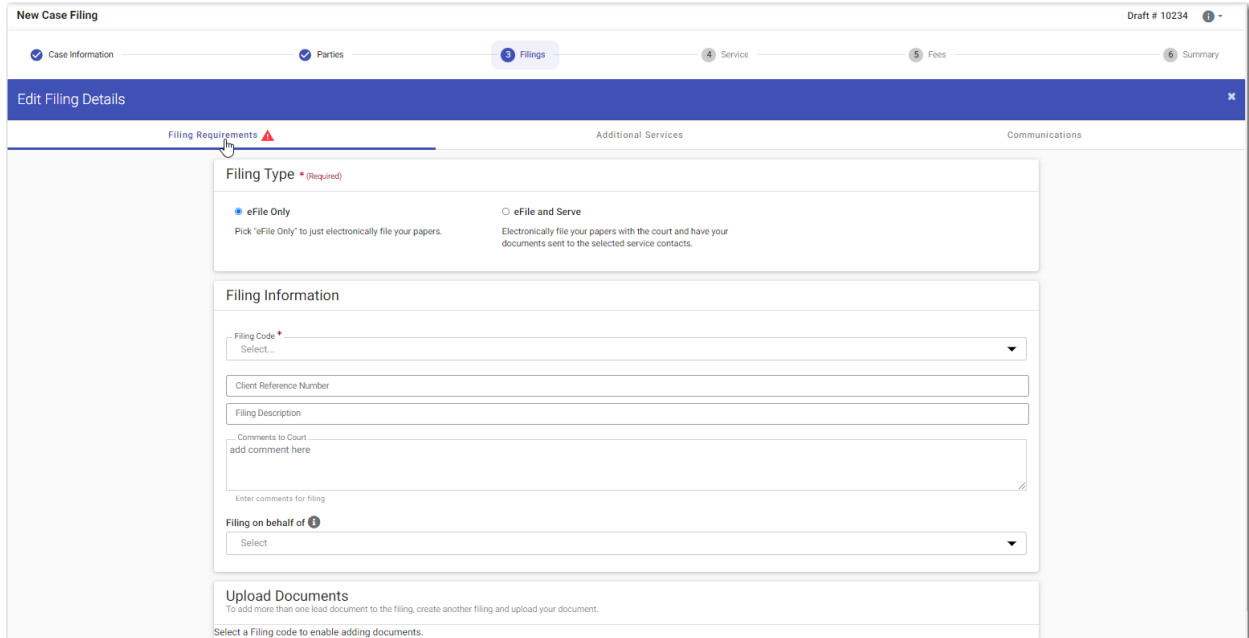
Figure 10.17 – Filings Page

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

To enter the filing details:

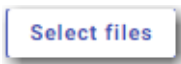


1. On the *Filings* page, click . The *Edit Filing Details* page is displayed.



**Figure 10.18 – Edit Filing Details Page**

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.
5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.



8. In the Upload Documents pane, click . Then, select the document that you want to upload.

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

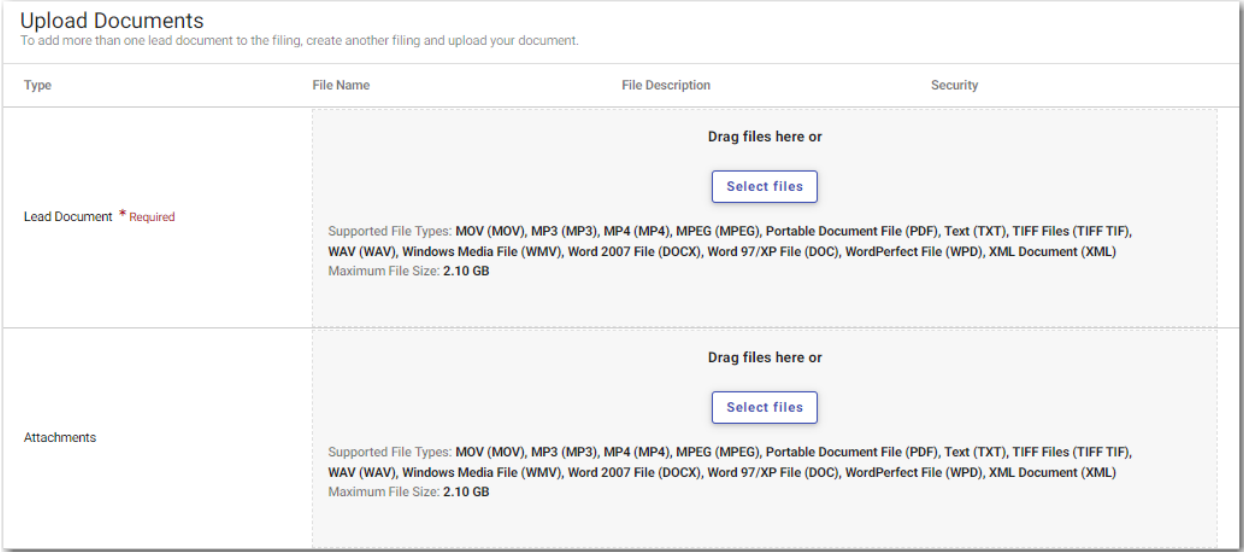
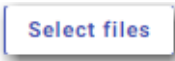


Figure 10.19 – Upload Documents Pane



- If you have attachments to add to the filing, click  in the **Attachments** section. Then, upload the specified attachments.
- If you want to add security to any of the documents, select an option from the **Security** drop-down list.
- To add additional services, click **Additional Services**.

The Additional Services pane is displayed.

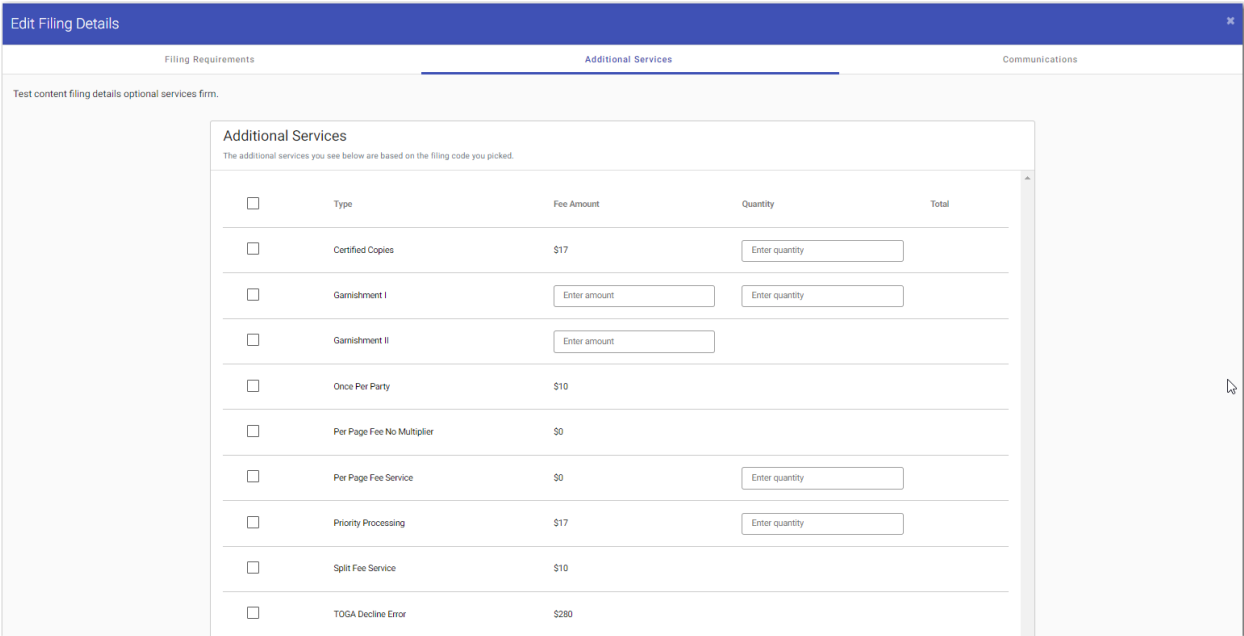
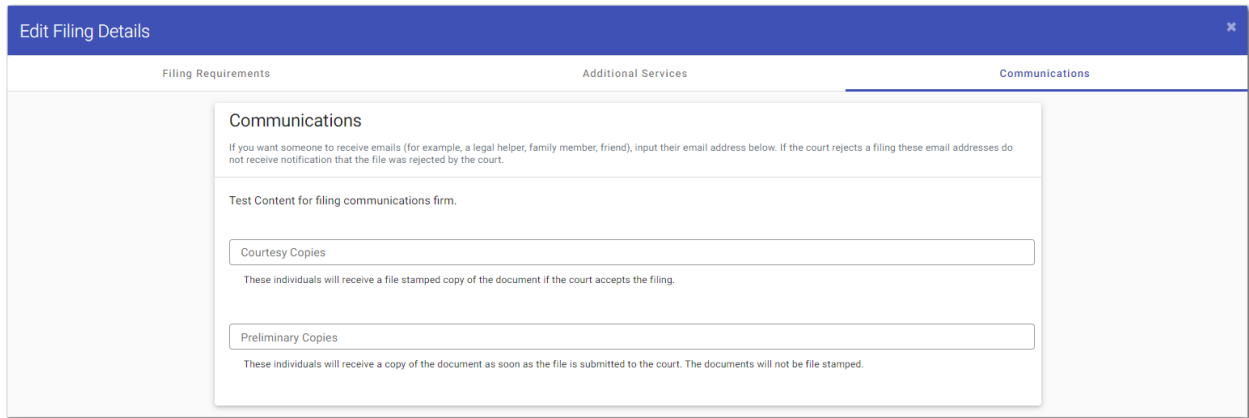


Figure 10.20 – Additional Services Pane on the Edit Filing Details Page

- Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

13. Click **Go to Communication**, or click **Communications** at the top of the page.

The Communications pane is displayed.



**Figure 10.21 – Communications Pane on the Edit Filing Details Page**

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

15. Click **Save**.

16. If you want to add another filing, on the *Filings* page, click **+ Add More**. Then, repeat the same steps for the next filing.

17. After you have added all of the filings, click **Service →**.

## Merging Documents for File Upload in a Case Filing

You can merge multiple documents into one file before uploading the file in a case filing.

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

To merge multiple documents for file upload:

1. Navigate to the *Filings* page.
2. Complete the fields pertaining to the case filing.
3. In the Upload Documents pane, click **Browse and merge**.



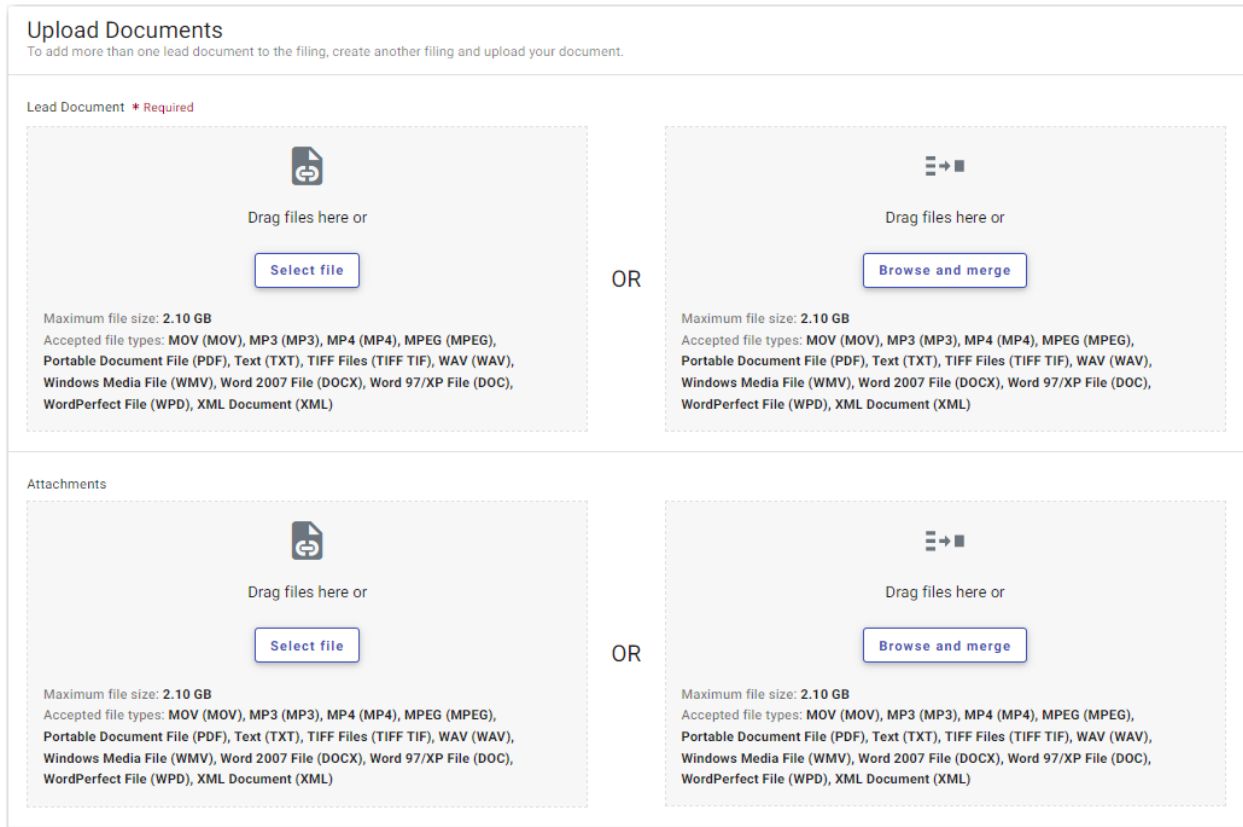


Figure 10.22 – Example of the Upload Documents Pane

The *Merge Files* window is displayed.

Merge Files

Lead document file name \*

Maximum file size: 2.10 GB

2.10 GB remaining

Upload Files



Add Separator Pages

Order	File Name	File Size	Action
-------	-----------	-----------	--------

You must provide at least two documents to merge.

Cancel Merge

Figure 10.23 – Merge Files Window

4. Type a name for the merged file in the **Lead document file name** field.
5. Click , and then upload the files that you want to merge.
6. If you want to add separator pages to the files, select **Add Separator Pages**.
7. If you want to change the order of the files after you have added them, use the arrows to reorder the files.
8. When you have added all of your files, reordered them if necessary, and named the merged file, click .

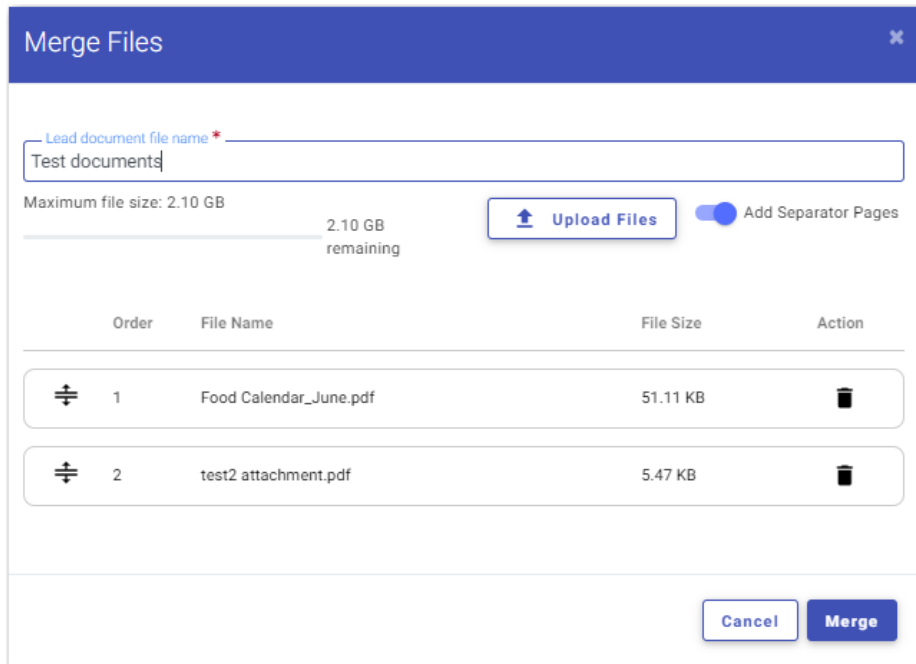


Figure 10.24 – Example of a Merge Files Window with the Files Uploaded

9. Proceed with the rest of your filing.

## Entering a Filing with an Ad Damnum Amount

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

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

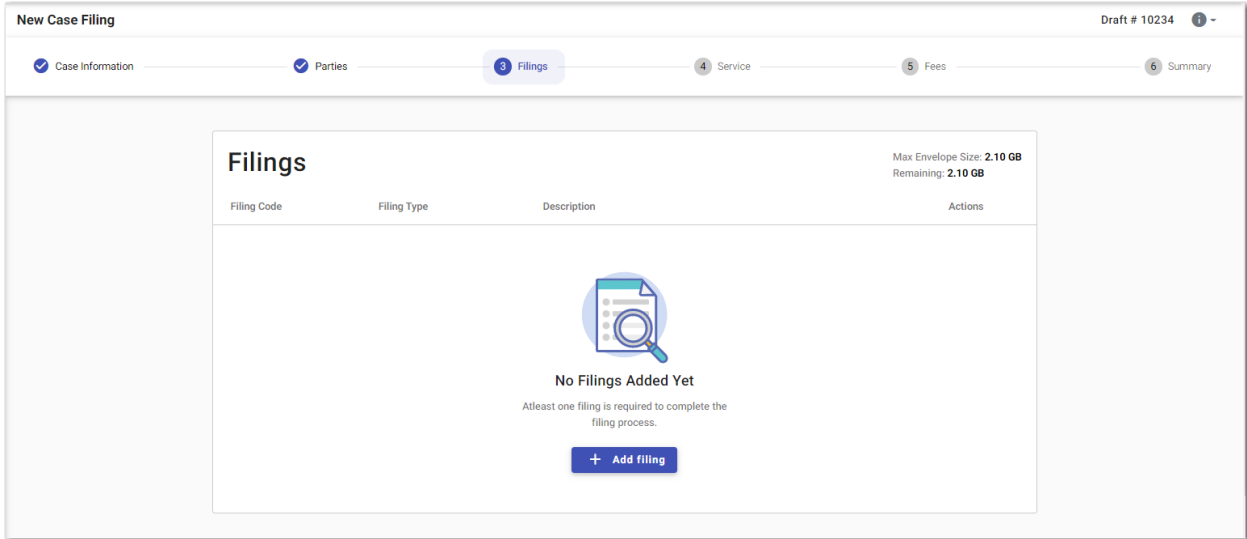



Figure 10.25 – Filings Page

To enter the filing details:



1. On the *Filings* page, click . The *Edit Filing Details* page is displayed.

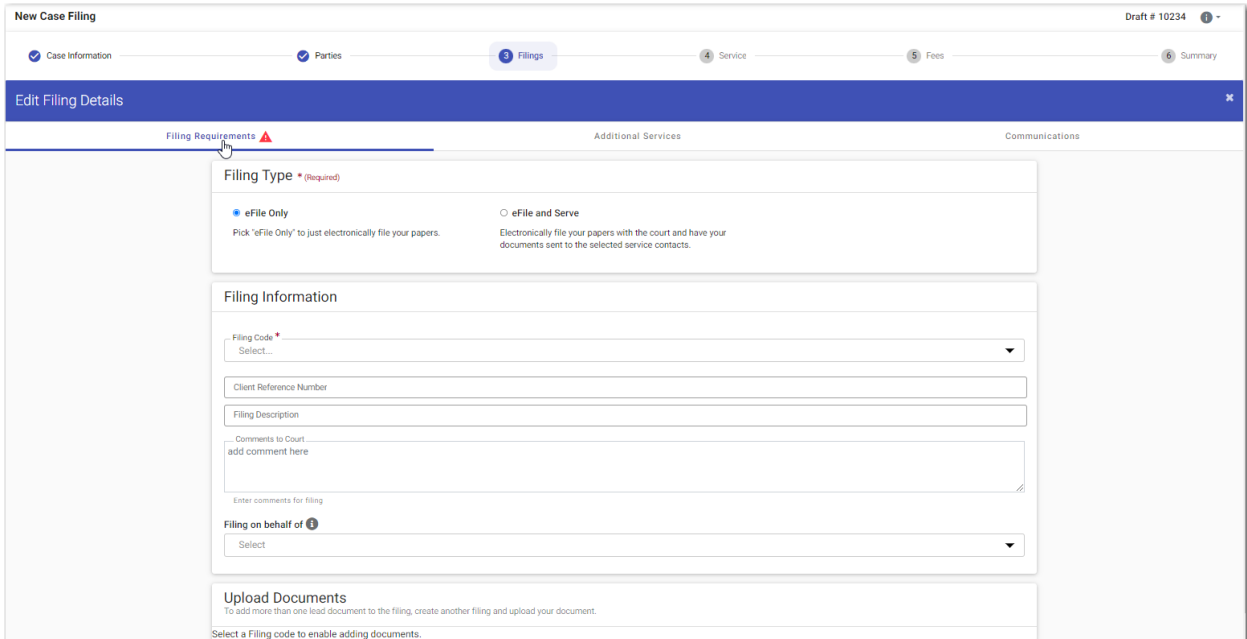


Figure 10.26 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the appropriate filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.

5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.

**Select files**

8. In the Upload Documents pane, click **Select files**. Then, select the document that you want to upload.

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

Type	File Name	File Description	Security
Lead Document * Required	Drag files here or <input type="button" value="Select files"/>		
	Supported File Types: MOV (MOV), MP3 (MP3), MP4 (MP4), MPEG (MPEG), Portable Document File (PDF), Text (TXT), TIFF Files (TIFF TIF), WAV (WAV), Windows Media File (WMV), Word 2007 File (DOCX), Word 97/XP File (DOC), WordPerfect File (WPD), XML Document (XML) Maximum File Size: 2.10 GB		
Attachments	Drag files here or <input type="button" value="Select files"/>		
	Supported File Types: MOV (MOV), MP3 (MP3), MP4 (MP4), MPEG (MPEG), Portable Document File (PDF), Text (TXT), TIFF Files (TIFF TIF), WAV (WAV), Windows Media File (WMV), Word 2007 File (DOCX), Word 97/XP File (DOC), WordPerfect File (WPD), XML Document (XML) Maximum File Size: 2.10 GB		

**Figure 10.27 – Upload Documents Pane**

**Select files**

9. If you have attachments to add to the filing, click **Select files** in the **Attachments** section. Then, upload the specified attachments.
10. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
11. To add additional services, click **Additional Services**.

The Additional Services pane is displayed.

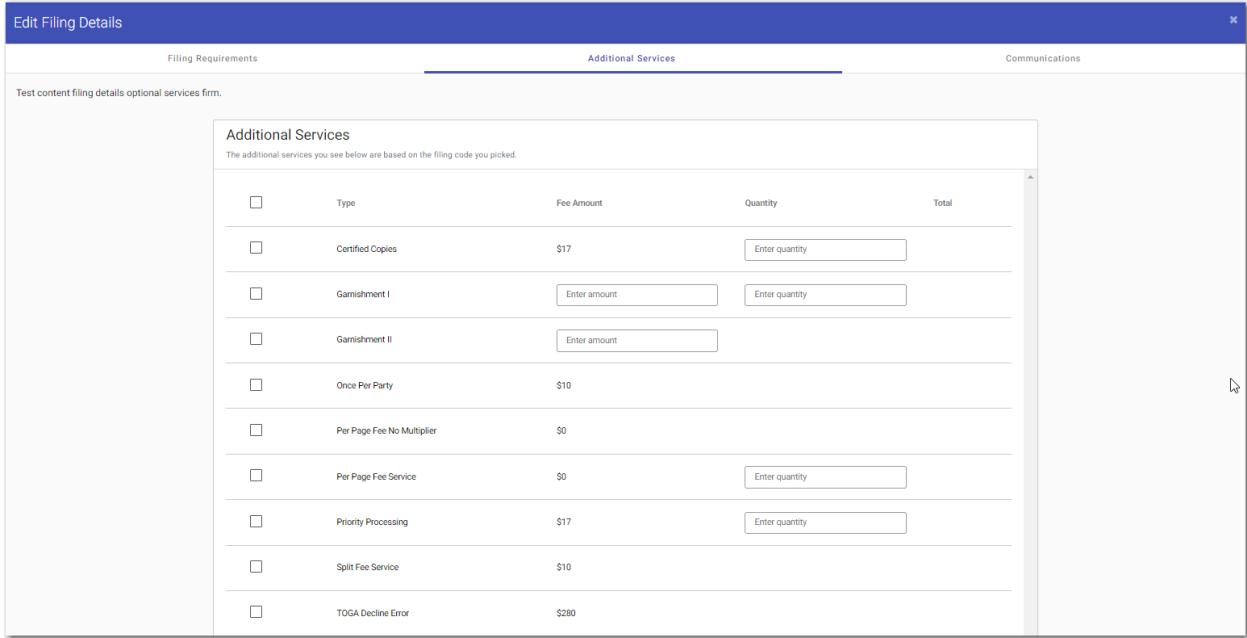


Figure 10.28 – Additional Services Pane on the Edit Filing Details Page

12. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

**Go to Communication**

13. Click **Go to Communication**, or click **Communications** at the top of the page.

The Communications pane is displayed.

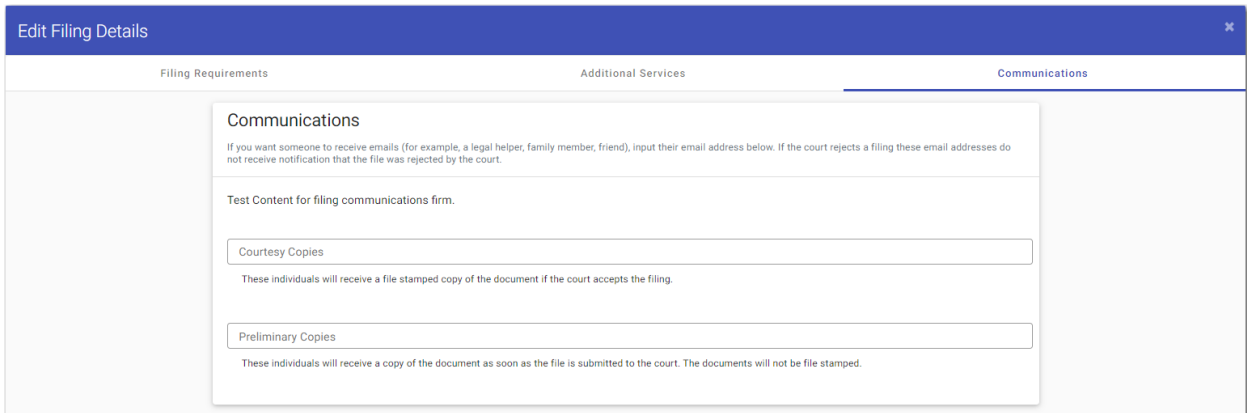


Figure 10.29 – Communications Pane on the Edit Filing Details Page

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

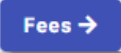
**Save**

15. Click **Save**.

**Service →**

16. Click **Service →**.

The *Service* page is displayed.

17. Select the service contacts, and then click  .

The *Fees* page is displayed.

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

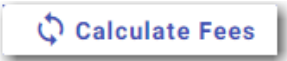
19. Select the payment account from the **Payment Account** drop-down list, or follow the steps to create a new payment account.

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

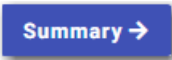
**Note: If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.**

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

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

23. Click  .

The fees for the filing are displayed.

24. Click  to review and complete your filing.

## Entering a Filing with a Motion Type Code

You can enter a filing for a specific motion type.

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

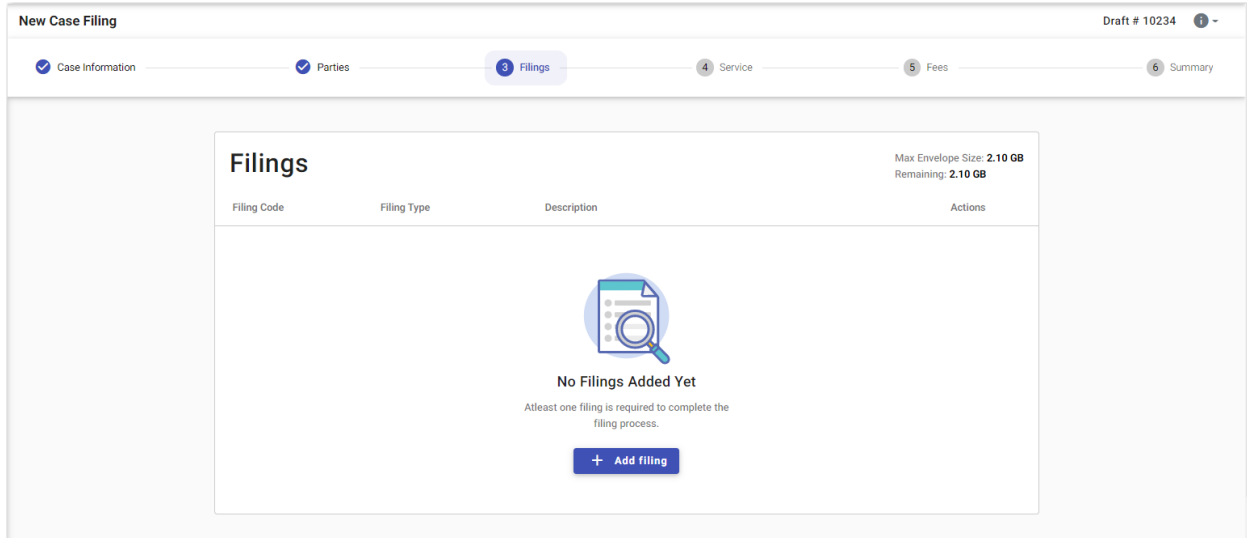



Figure 10.30 – Filings Page

To enter a filing with a Motion Type code:

1. On the *Filings* page, click . The *Edit Filing Details* page is displayed.



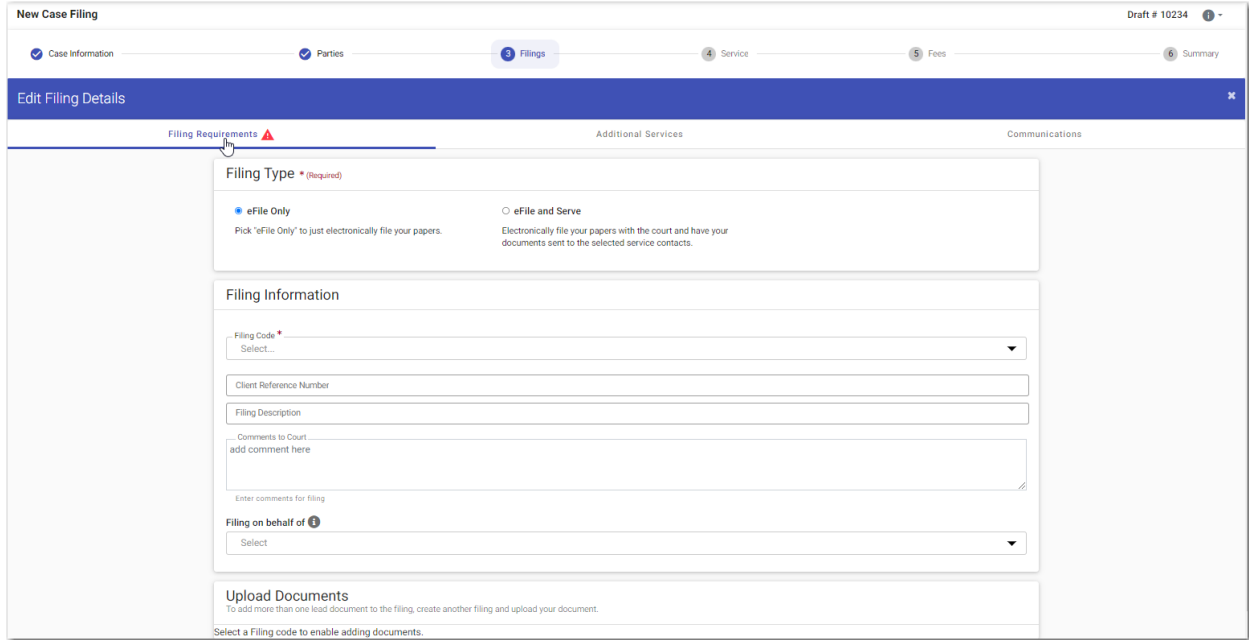


Figure 10.31 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select a Motion filing code from the **Filing Code** drop-down list.  
The **Motion Type** drop-down list is displayed with a list of applicable motion types.
4. Select the appropriate motion type from the drop-down list.
5. Type a client reference number in the **Client Reference Number** field.
6. Type a description in the **Filing Description** field.
7. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
8. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.
9. In the Upload Documents pane, click Select files. Then, select the document that you want to upload.

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

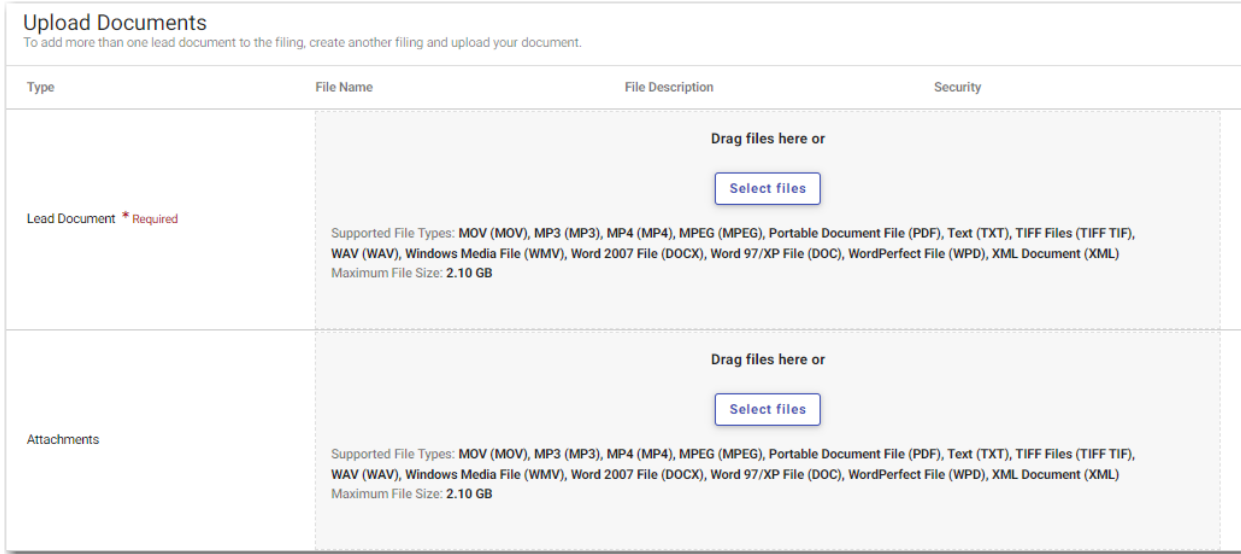
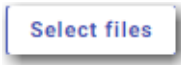


Figure 10.32 – Upload Documents Pane



10. If you have attachments to add to the filing, click **Select files** in the **Attachments** section. Then, upload the specified attachments.
11. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
12. To add additional services, click **Additional Services**.

The Additional Services pane is displayed.

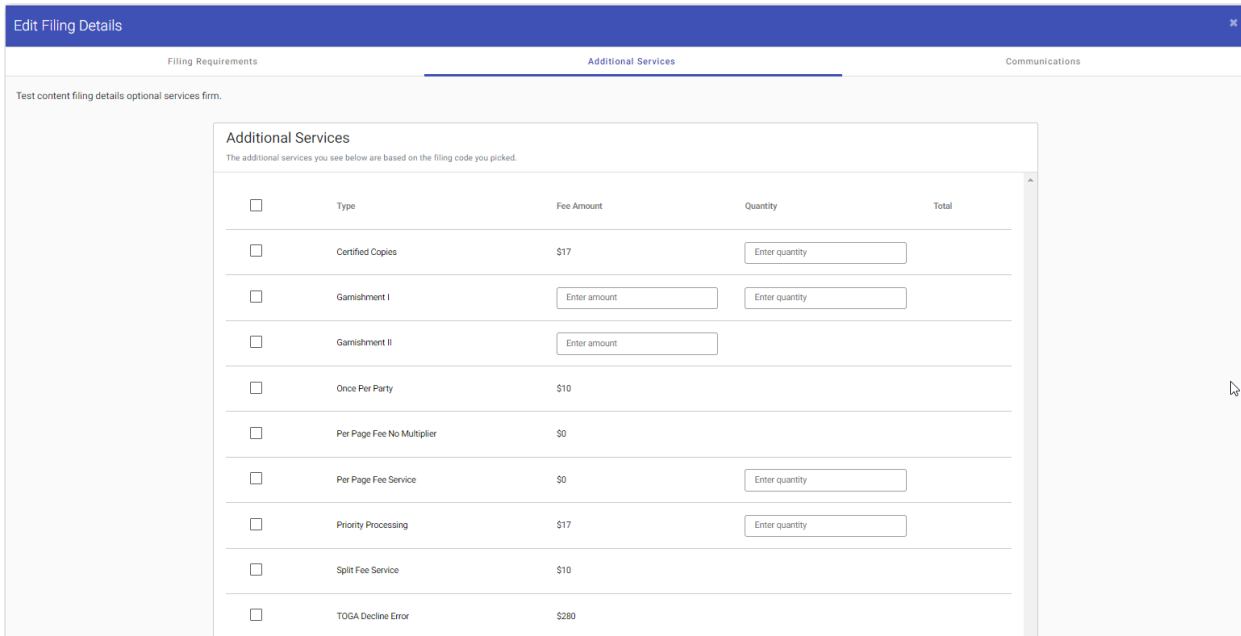
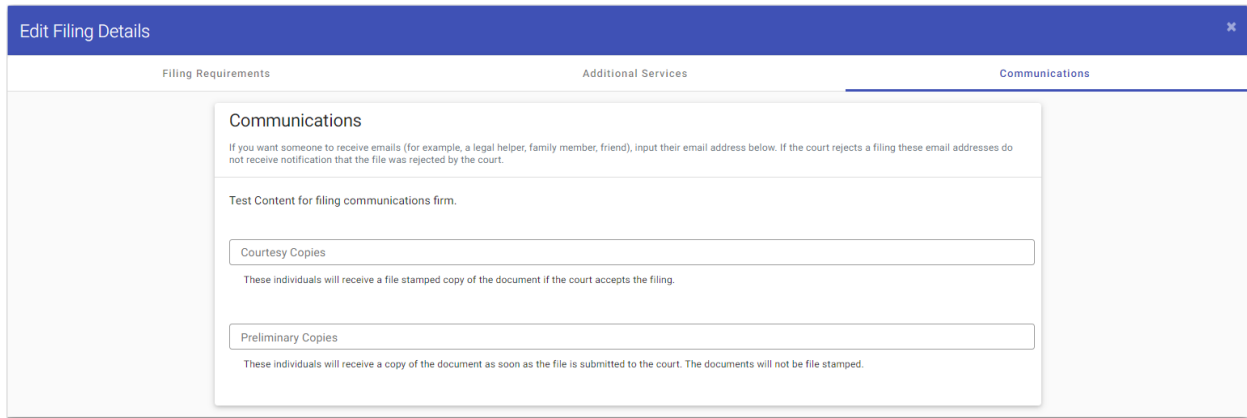


Figure 10.33 – Additional Services Pane on the Edit Filing Details Page

13. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

14. Click **Go to Communication**, or click **Communications** at the top of the page.

The Communications pane is displayed.



**Figure 10.34 – Communications Pane on the Edit Filing Details Page**

15. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

16. Click **Save**.

17. If you want to add another filing, on the *Filings* page, click **+ Add More**. Then, repeat the same steps for the next filing.

18. After you have added all of the filings, click **Service →**.

## Entering a Filing with a Claim Amount

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

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

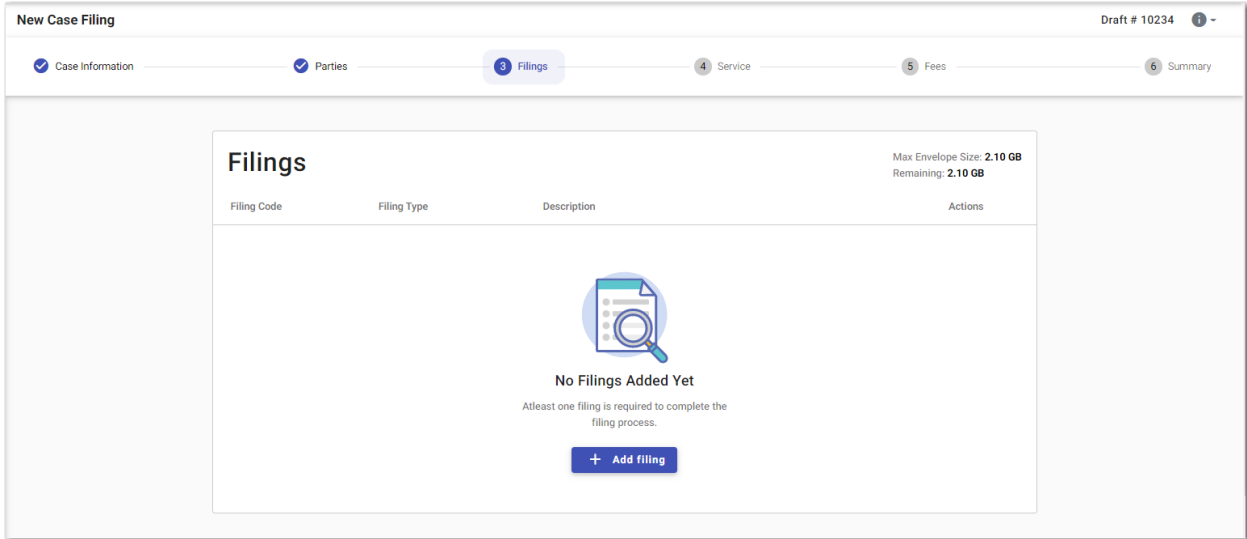



Figure 10.35 – Filings Page

To enter the filing details:



1. On the *Filings* page, click . The *Edit Filing Details* page is displayed.

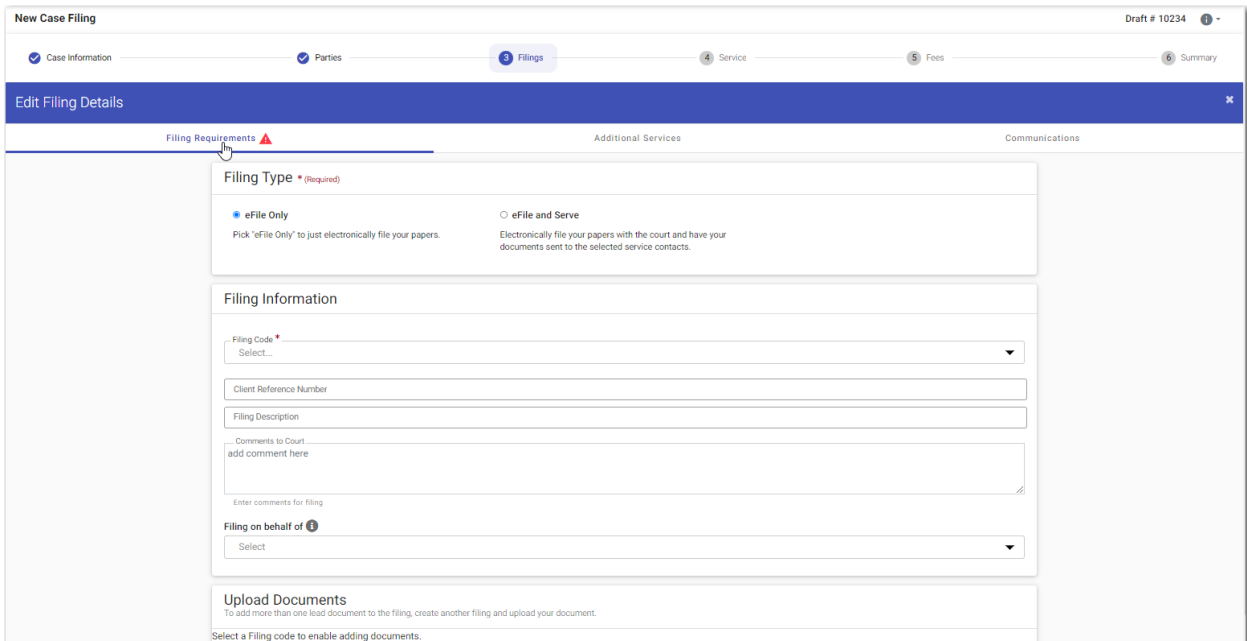


Figure 10.36 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the appropriate filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.

5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.

Select files

8. In the Upload Documents pane, click Select files. Then, select the document that you want to upload.

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

**Upload Documents**  
To add more than one lead document to the filing, create another filing and upload your document.

Type	File Name	File Description	Security
Lead Document * Required		Drag files here or <span style="border: 1px solid black; border-radius: 5px; padding: 2px 5px; display: inline-block;">Select files</span>	
		Supported File Types: MOV (MOV), MP3 (MP3), MP4 (MP4), MPEG (MPEG), Portable Document File (PDF), Text (TXT), TIFF Files (TIFF TIF), WAV (WAV), Windows Media File (WMV), Word 2007 File (DOCX), Word 97/XP File (DOC), WordPerfect File (WPD), XML Document (XML) Maximum File Size: 2.10 GB	
Attachments		Drag files here or <span style="border: 1px solid black; border-radius: 5px; padding: 2px 5px; display: inline-block;">Select files</span>	
		Supported File Types: MOV (MOV), MP3 (MP3), MP4 (MP4), MPEG (MPEG), Portable Document File (PDF), Text (TXT), TIFF Files (TIFF TIF), WAV (WAV), Windows Media File (WMV), Word 2007 File (DOCX), Word 97/XP File (DOC), WordPerfect File (WPD), XML Document (XML) Maximum File Size: 2.10 GB	

**Figure 10.37 – Upload Documents Pane**

Select files

9. If you have attachments to add to the filing, click Select files in the **Attachments** section. Then, upload the specified attachments.
10. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
11. To add additional services, click **Additional Services**.

The Additional Services pane is displayed.

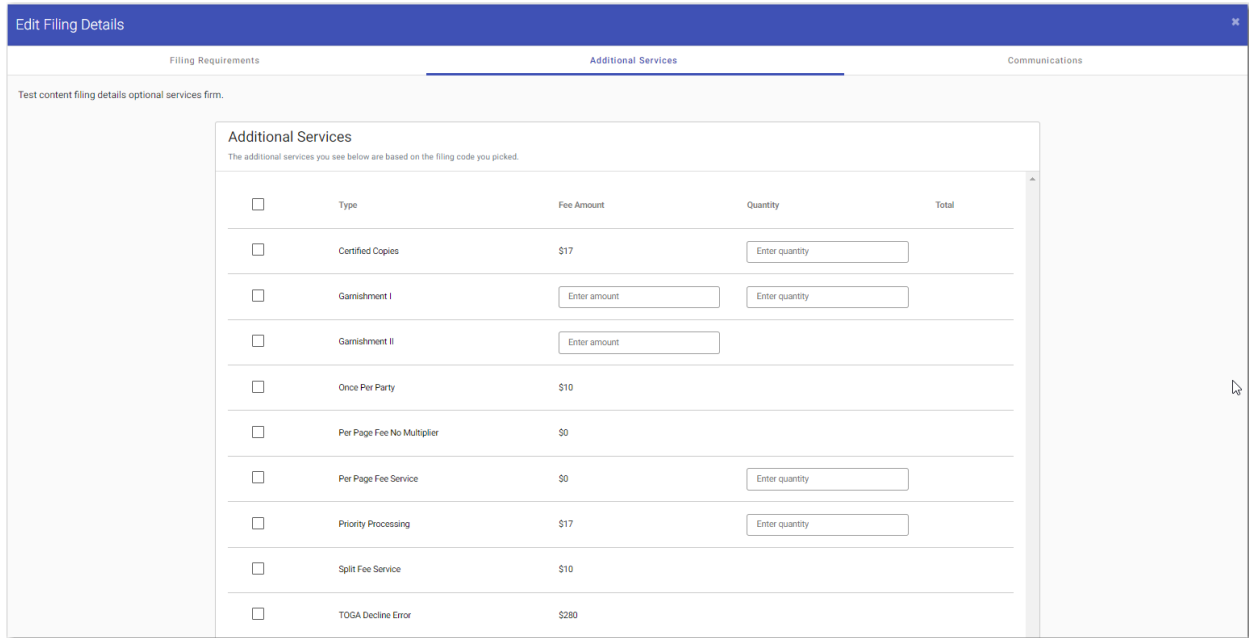


Figure 10.38 – Additional Services Pane on the Edit Filing Details Page

12. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

**Go to Communication**

13. Click **Go to Communication**, or click **Communications** at the top of the page.

The Communications pane is displayed.

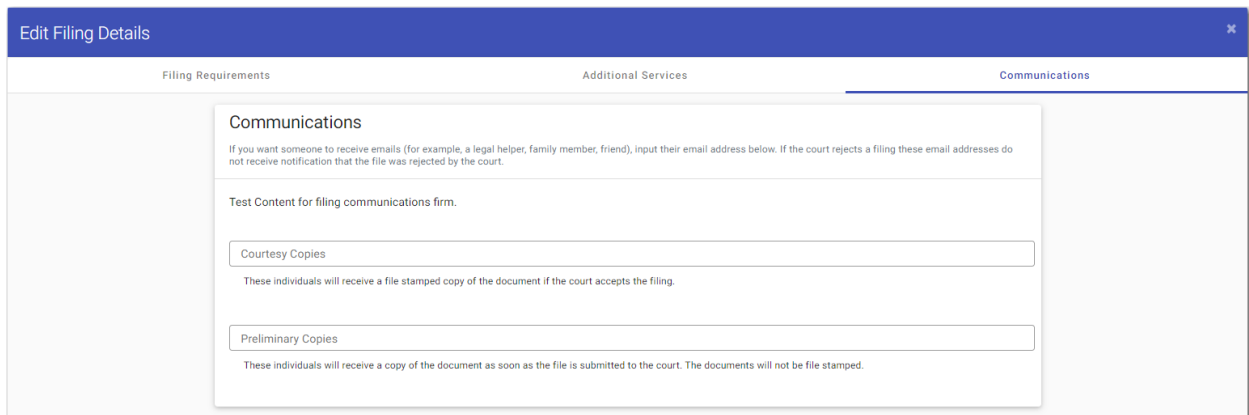


Figure 10.39 – Communications Pane on the Edit Filing Details Page

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

**Save**

15. Click **Save**.

**Service →**

16. Click **Service →**.

The *Service* page is displayed.

17. Select the service contacts, and then click



The *Fees* page is displayed.

18. On the *Fees* page, type the Claim Amount in the **Claim Amount** field.

19. Select the payment account from the **Payment Account** drop-down list, or follow the steps to create a new payment account.

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

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

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


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

23. Click



The fees for the filing are displayed.

24. Click



to review and complete your filing.

## Entering a Filing with an Estate Value

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

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

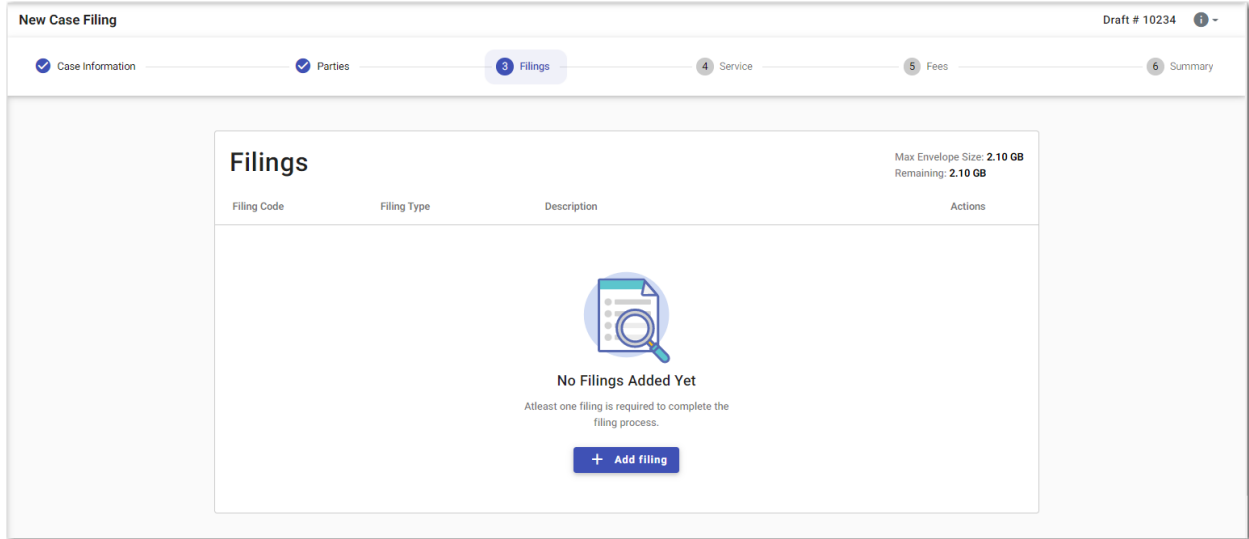



Figure 10.40 – Filings Page

To enter the filing details:



1. On the *Filings* page, click . The *Edit Filing Details* page is displayed.

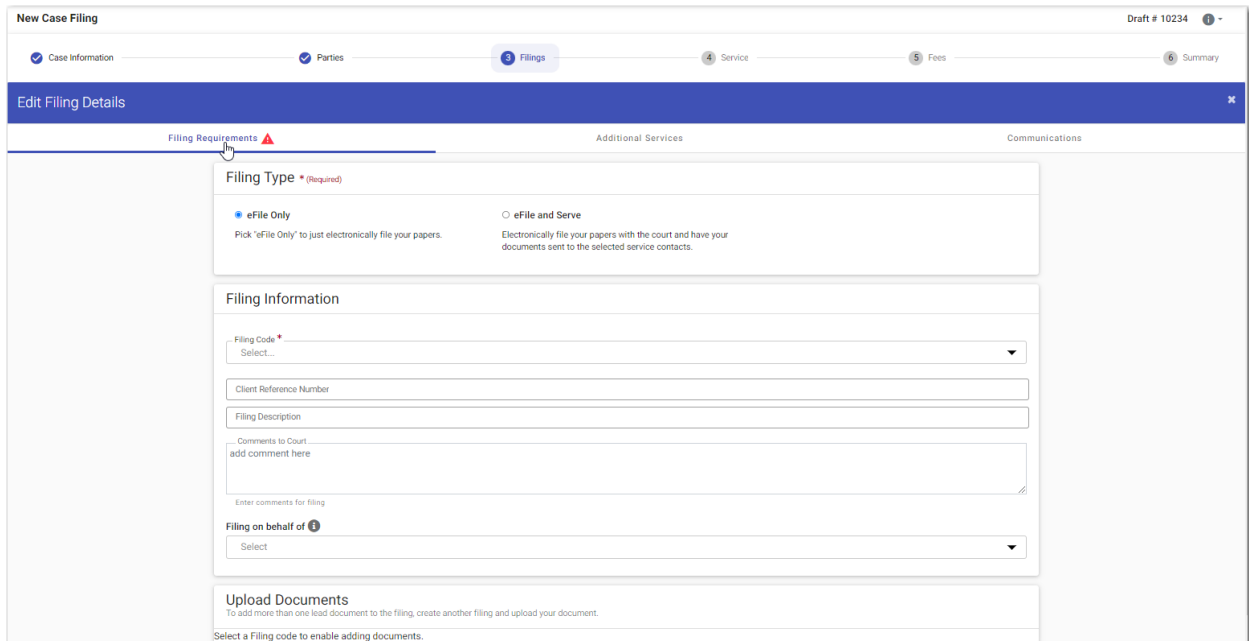


Figure 10.41 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the appropriate filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.



5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.

Select files

8. In the Upload Documents pane, click Select files. Then, select the document that you want to upload.

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

**Upload Documents**  
To add more than one lead document to the filing, create another filing and upload your document.

Type	File Name	File Description	Security
Lead Document * Required		Drag files here or <span style="border: 1px solid black; border-radius: 5px; padding: 2px 10px; display: inline-block;">Select files</span> <small>Supported File Types: MOV (MOV), MP3 (MP3), MP4 (MP4), MPEG (MPEG), Portable Document File (PDF), Text (TXT), TIFF Files (TIFF TIF), WAV (WAV), Windows Media File (WMV), Word 2007 File (DOCX), Word 97/XP File (DOC), WordPerfect File (WPD), XML Document (XML) Maximum File Size: 2.10 GB</small>	
Attachments		Drag files here or <span style="border: 1px solid black; border-radius: 5px; padding: 2px 10px; display: inline-block;">Select files</span> <small>Supported File Types: MOV (MOV), MP3 (MP3), MP4 (MP4), MPEG (MPEG), Portable Document File (PDF), Text (TXT), TIFF Files (TIFF TIF), WAV (WAV), Windows Media File (WMV), Word 2007 File (DOCX), Word 97/XP File (DOC), WordPerfect File (WPD), XML Document (XML) Maximum File Size: 2.10 GB</small>	

**Figure 10.42 – Upload Documents Pane**

Select files

9. If you have attachments to add to the filing, click Select files in the **Attachments** section. Then, upload the specified attachments.
10. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
11. To add additional services, click **Additional Services**.

The Additional Services pane is displayed.

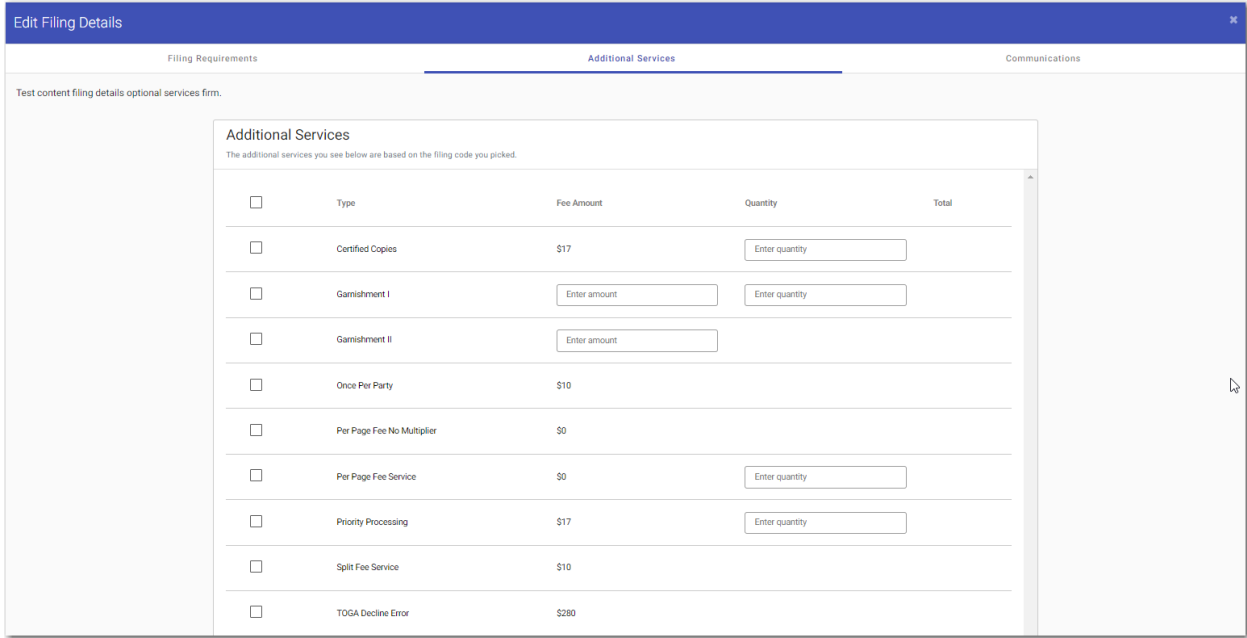


Figure 10.43 – Additional Services Pane on the Edit Filing Details Page

12. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

**Go to Communication**

13. Click **Go to Communication**, or click **Communications** at the top of the page.

The Communications pane is displayed.

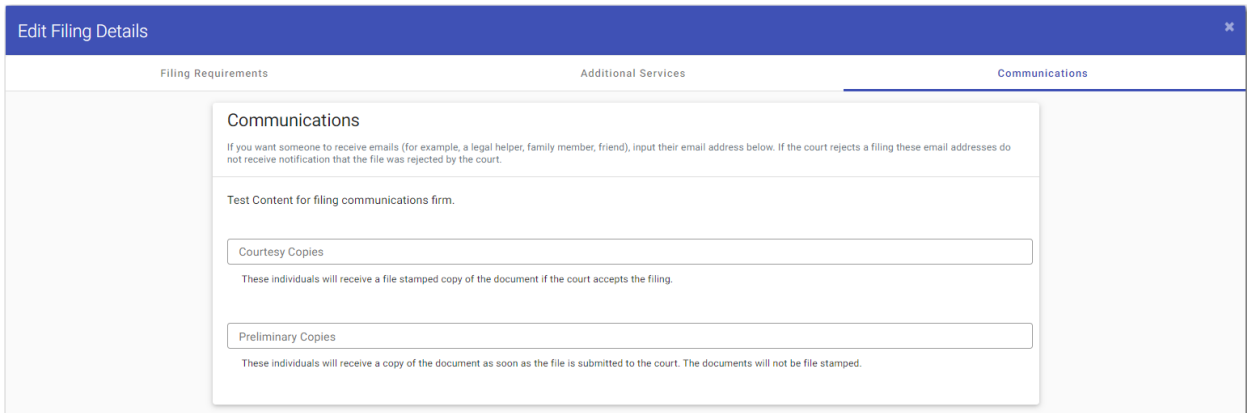


Figure 10.44 – Communications Pane on the Edit Filing Details Page

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

**Save**

15. Click **Save**.

**Service →**

16. Click **Service →**.

The *Service* page is displayed.

17. Select the service contacts, and then click  .

The *Fees* page is displayed.

18. On the *Fees* page, type the Estate Value in the **Estate Value** field.


19. Select the payment account from the **Payment Account** drop-down list, or follow the steps to create a new payment account.

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


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

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

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

23. Click  .

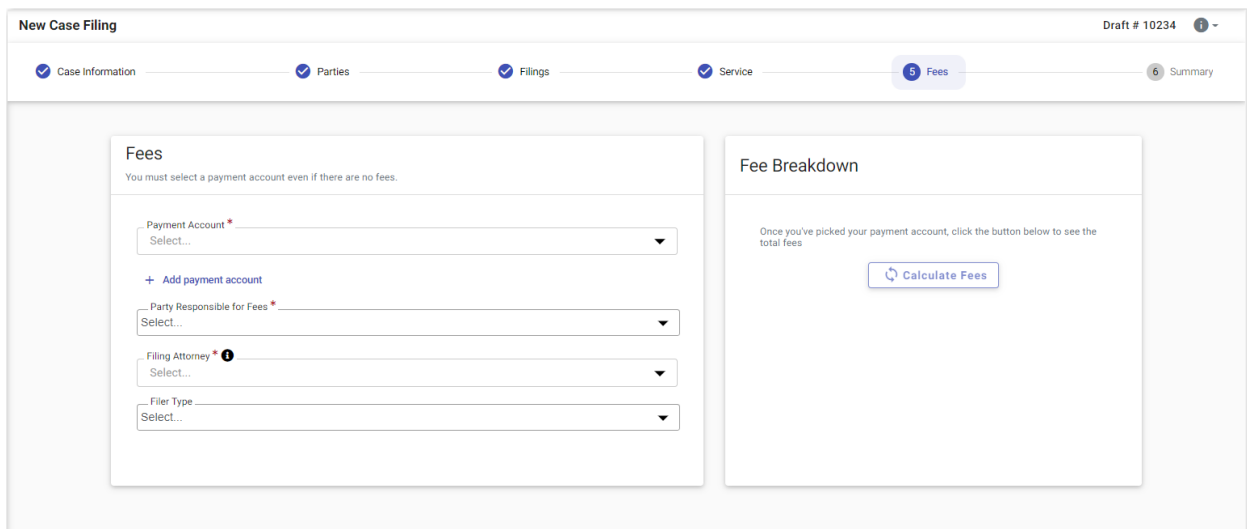
The fees for the filing are displayed.

24. Click  to review and complete your filing.

## Entering Payment Information

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

**Note: If your firm does not already have a payment account, you can create an account on the *Fees* page.**



**Figure 10.45 – Example of a Fees Page**

To enter the payment information for your filing:

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

[+ Add payment account](#)

If you do not have an existing payment account, click [+ Add payment account](#). Additional fields are displayed. Then, follow the steps to create a new payment account.

Refer to the following topics for details on creating the various types of payment accounts:

- [Adding a Credit Card Payment Account](#), page 58
- [Adding an E-Check Payment Account](#), page 62
- [Adding a Draw-Down Account](#), page 66

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

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

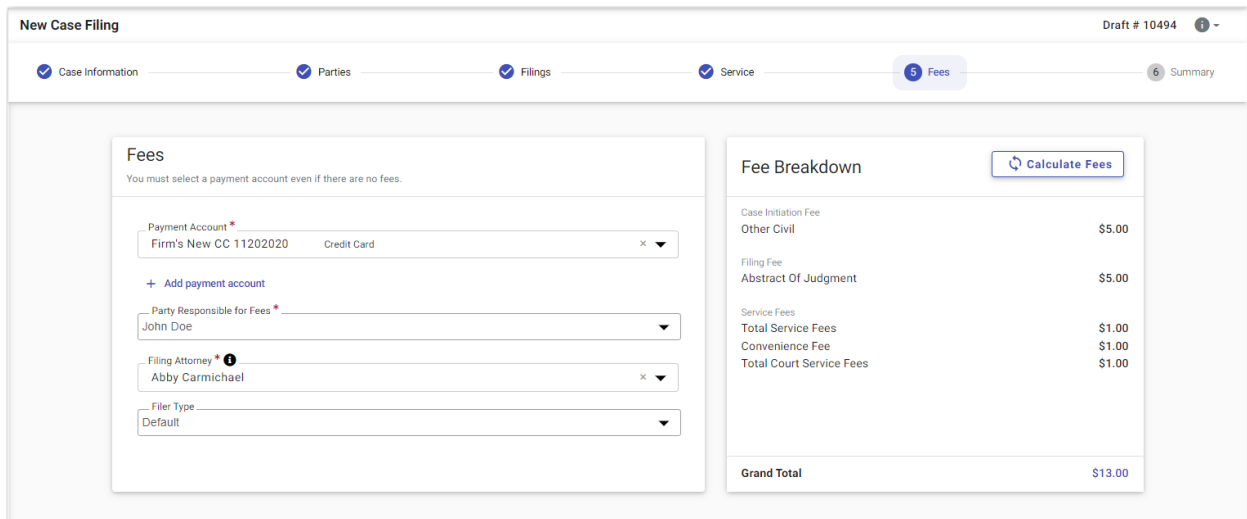
3. Select the filing attorney from the **Filing Attorney** drop-down list.

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

[Calculate Fees](#)

5. In the Fee Breakdown pane, click [Calculate Fees](#).

The fees for the filing are displayed.



**Figure 10.46 – Example of a Fees Page with the Filing Fees Displayed**

If you selected mail service for your filing, the mail service fees are displayed on the *Fees* page.

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

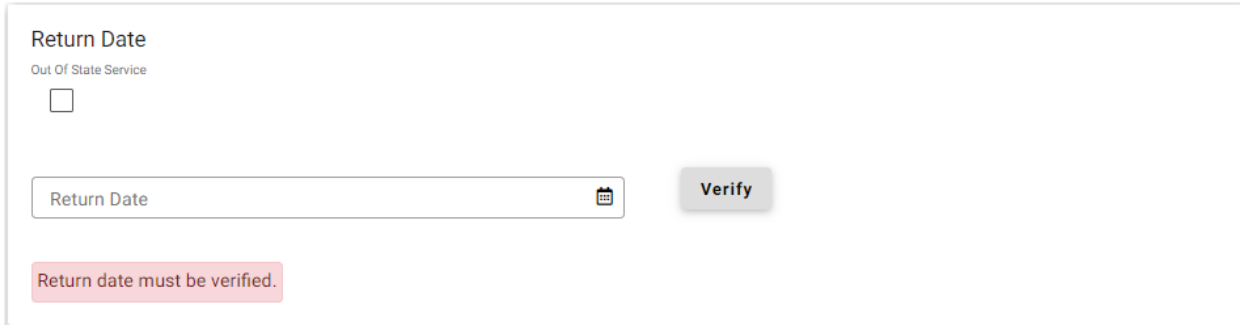
[Summary →](#)

6. Review the filing fees, and then click [Summary →](#).

## Capability for Filing a Return Date


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

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



Return Date


Out Of State Service

Return Date 

Verify

Return date must be verified.

**Figure 10.47 – Example of the Return Date Pane**

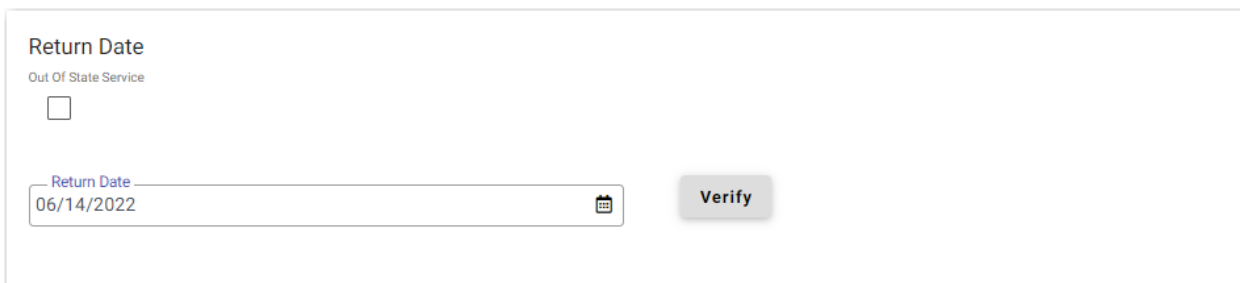
After selecting a return date, click  to check whether the selected date is available. If the selected date is verified, a confirmation message is displayed.

**Note: You cannot proceed until you verify the selected date.**




**Figure 10.48 – Return Date Verified Message**

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



Return Date

Out Of State Service

Return Date 

06/14/2022

Verify

**Figure 10.49 – Example of the Return Date Pane with a Valid Date Displayed**

If you select an invalid return date, the invalid date is displayed with a red border, indicating an error. You cannot proceed until you select a valid date.

### Return Date

Out Of State Service

Return Date

05/31/2022

Verify

**Figure 10.50 – Example of the Return Date Pane with an Error in the Return Date Field**

After you complete your filing, the return date is displayed in the envelope details. If you requested out-of-state service, that information is also displayed in the envelope details.

Envelope Details
Print X

Envelope			
Envelope ID 187677	Submitted by Lauren Groswald	Username [redacted]@gmail.com	

Case Information		
Client Location OFS MockCMS	Case Type *****	Case Category *****

Hearing		
Hearing Start Date 06/04/2022	Hearing Start Time 8:00 AM	Hearing End Time 9:00 AM

Return Date	
Return Date 06/14/2022	

Parties		
Party Type	Party Name	Lead Attorney
Defendant	John Doe	Abby Carmichael
Plaintiff	Sally Smith	Perry Mason

Filings			
Filing Code	Filing Type	Filing Description	Client Ref #
Abstract Of Judgment	eFile Only		

Service Contacts	
Service Contacts	

Fees			
Payment account Firm's New CC 11202020	Party responsible John Doe	Filing attorney	Firm Type Default
Order ID 000187677-0	Transaction Response	Transaction Amount \$8.00	Transaction ID 158928
Filing Fee Abstract Of Judgment			\$5.00
Service Fees Convenience Fee			\$1.00
Total Filing & Service Fees			\$1.00
Total Court Service Fees			\$1.00
<b>Grand Total</b>			<b>\$8.00</b>

Support

**Figure 10.51 – Example of the Return Date in the Envelope Details**

# Selecting a Return Date for a Case Filing

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

To select a return date for a case filing:

1. From the *Dashboard* page, click 

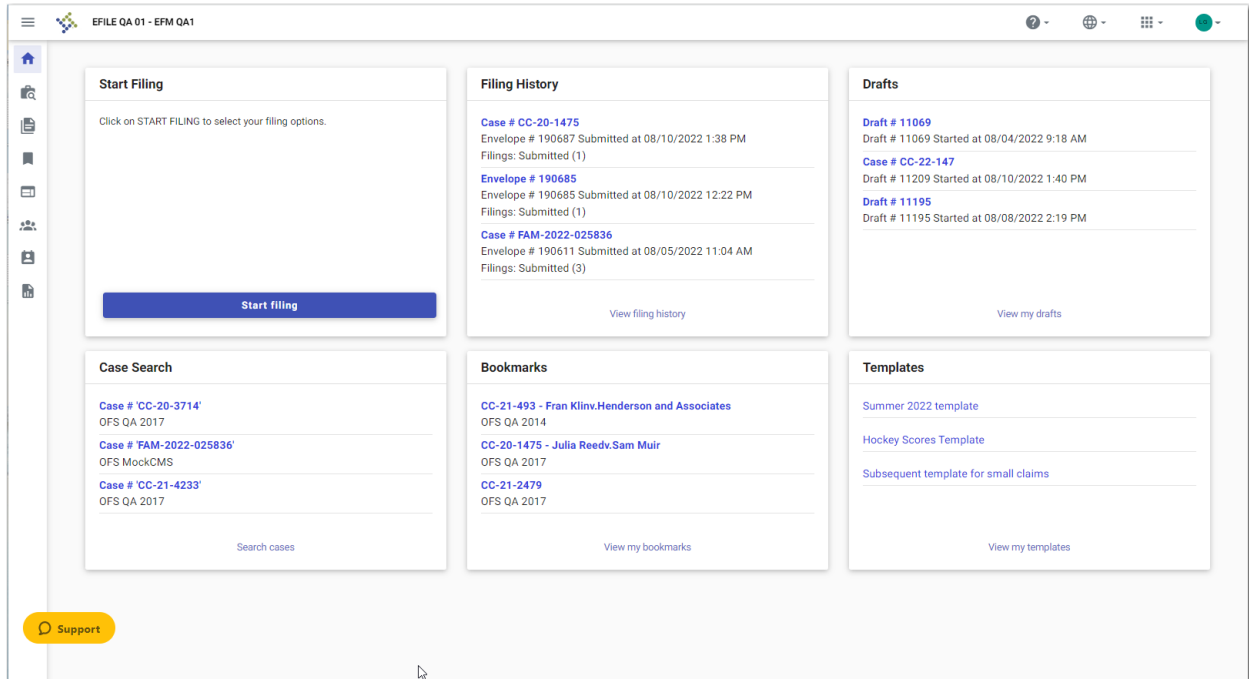


Figure 10.52 – Example of a Dashboard Page

The *Start Filing* page is displayed.

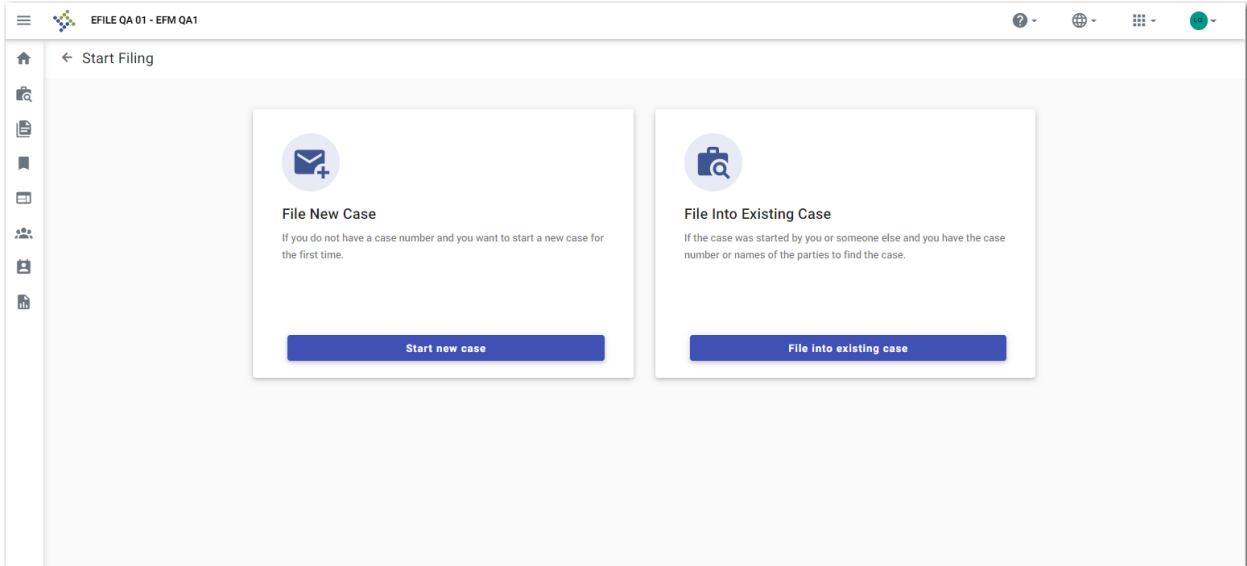
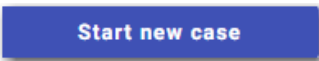






Figure 10.53 – Start Filing Page

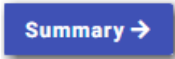
2. Click .
 

The *Case Information* page is displayed.
3. Complete the details for the case by completing the fields on the *Case Information* page, and then click .
 

The *Parties* page is displayed.
4. Complete the fields on the *Parties* page, and then click .
 

The *Filings* page is displayed.
5. Complete the fields on the *Filings* page, and then click .
 

The *Service* page is displayed.
6. Select the service contacts, and then click .
 

The *Fees* page is displayed.
7. Complete the fields on the *Fees* page, and then click .
 

The *Summary* page is displayed.



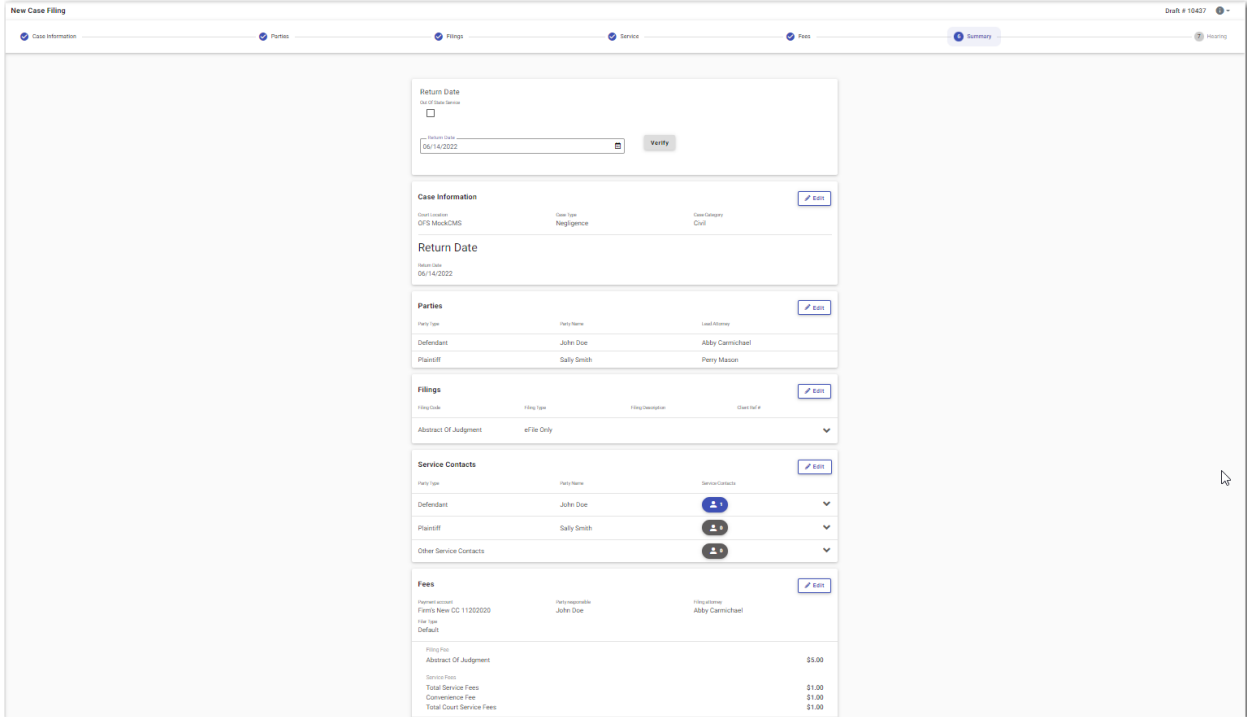


Figure 10.54 – Example of the Return Date Pane on the Summary Page

8. On the *Summary* page, to select a return date:
  - a. If the respondent is located out of state, select the **Out of State Service** check box.

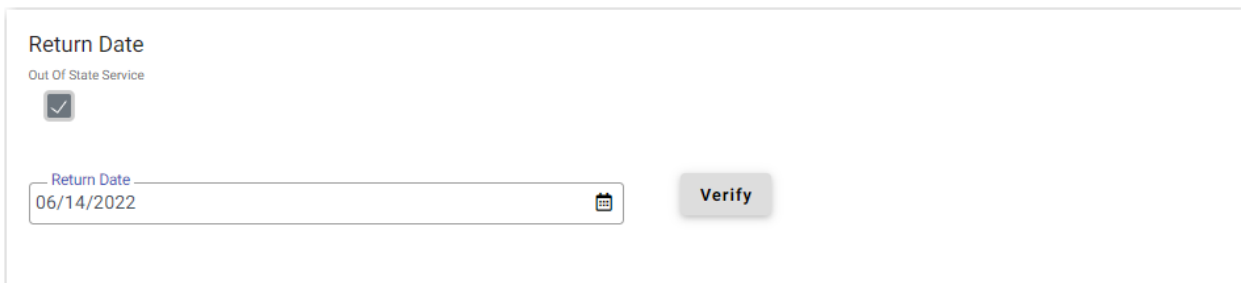

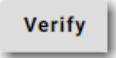


Figure 10.55 – Out of State Service Check Box Selected in the Return Date Pane

- b. Type a date in the **Return Date** field, or click  to select a date from the calendar.
    - c. Click  .

If the selected date is verified, a confirmation message is displayed.

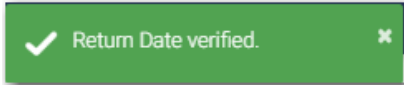


Figure 10.56 – Return Date Verified Message

If the selected date is not verified, the system may change the date. If the date is changed, the new date will be displayed in the **Return Date** field.

Figure 10.57 – Example of the Return Date Pane with a Valid Date Displayed

9. Verify the rest of the information on the *Summary* page, and then submit your filing.

## Reverify the Return Date

The system forces you to reverify the return date if you navigate away from the *Summary* page before submitting the filing. When you return to the *Summary* page, you must reverify the return date before the filing can be submitted.

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

## Reverifying a Return Date

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

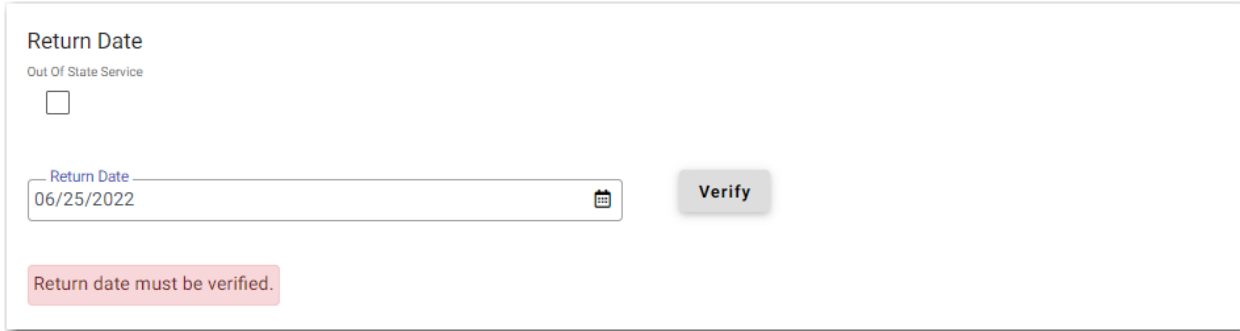
To reverify the return date:

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




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

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

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



**Figure 10.58 – Return Date Pane**

2. Click  to verify the date that is displayed, or type a new date, and then click .
3. When all of the information on the *Summary* page is correct, click .

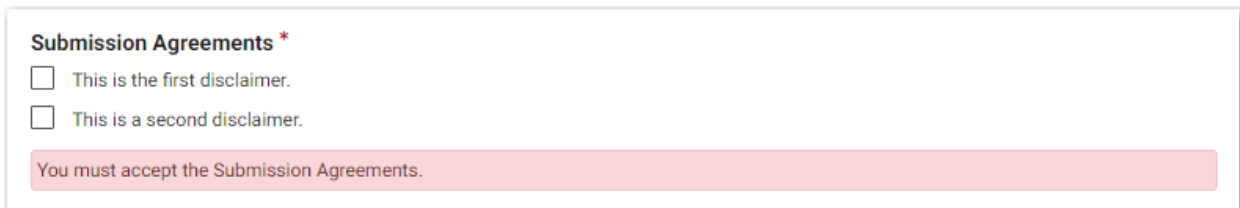
## Submission Agreements

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

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

The Submission Agreements pane is displayed on the *Summary* page. If submission agreements are configured by your court, you must select the check boxes in the Submission Agreements pane to complete your filing.

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



**Figure 10.59 – Example of a Submission Agreements Pane with Two Disclaimers**



**Figure 10.60 – Example of a Submission Agreements Pane with the Check Boxes Selected for Two Disclaimers**

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

## Viewing the Envelope Summary

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

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

To view the envelope summary:

1. Complete the required information on the *Case Information*, *Parties*, *Filings* and *Fees* pages.

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

The *Summary* page is displayed.

Figure 10.61 – Example of a Summary Page

If you selected mail service for your filing, the mail service fees are displayed in the Fees pane on the *Summary* page.

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

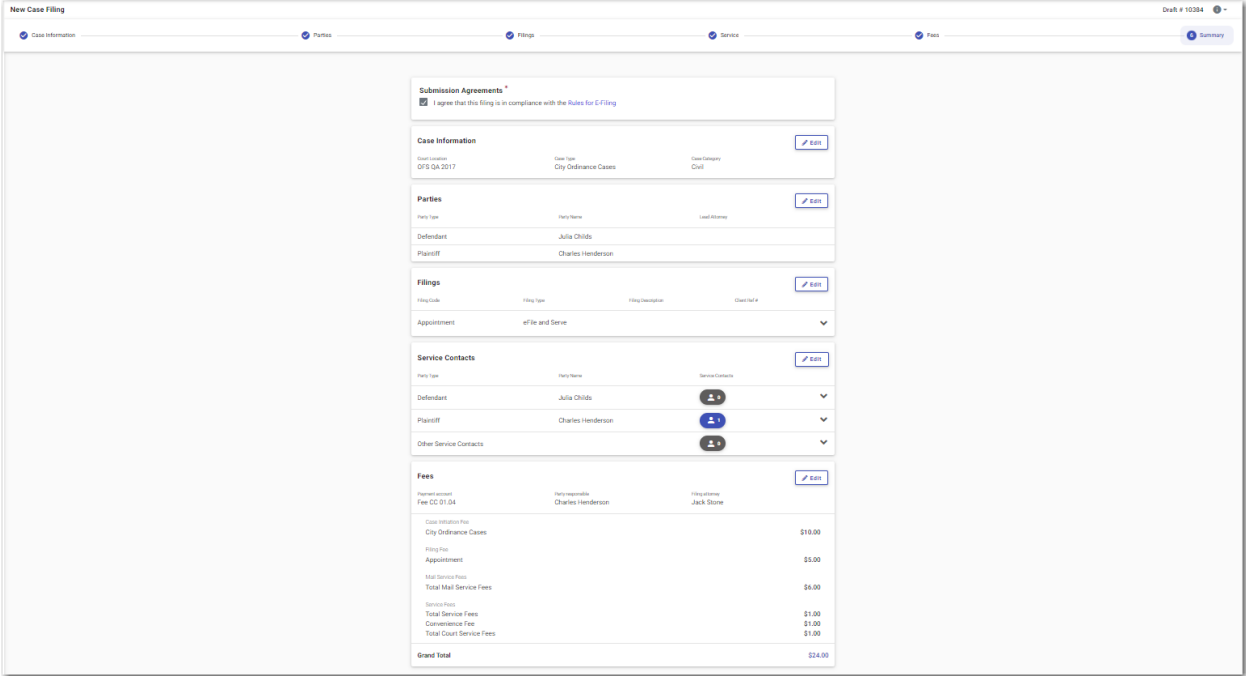


Figure 10.62 – Example of a Summary Page with Mail Service Fees Displayed

If envelope comments are configured on your system, the comments are displayed in the Case pane on the *Summary* page.

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

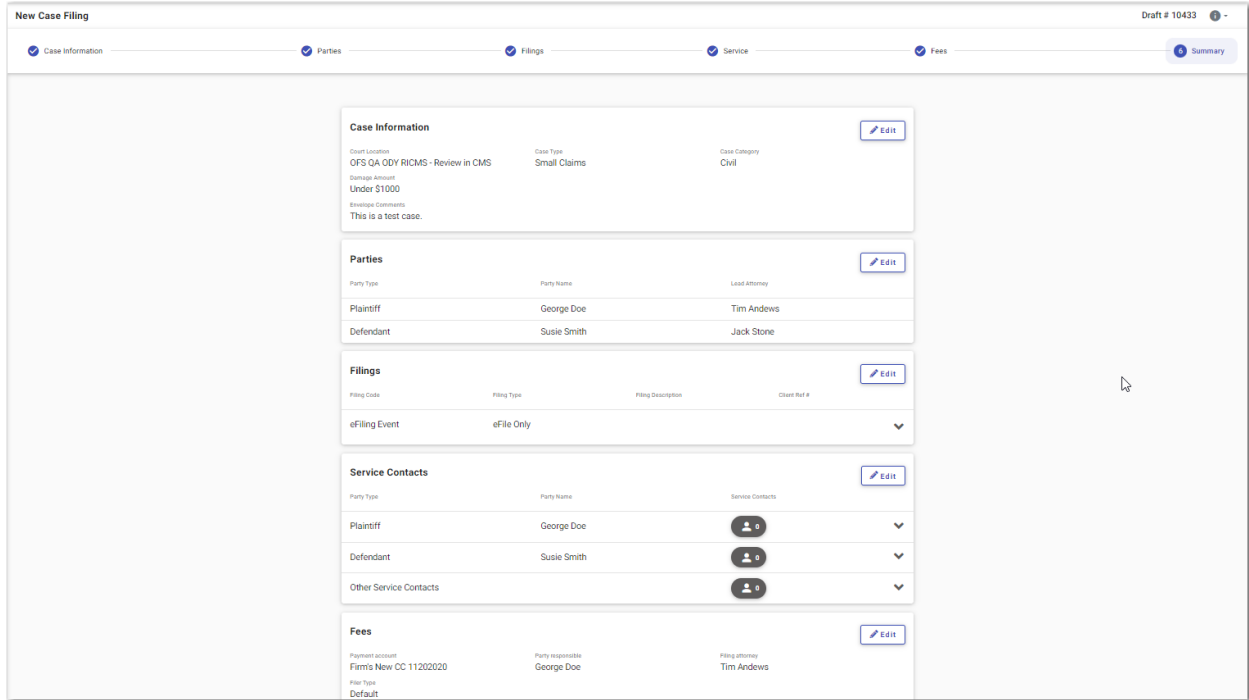


Figure 10.63 – Example of a Summary Page with Envelope Comments Displayed

3. If there are submission agreements for your filing, select the appropriate check boxes for the submission agreements.
4. Review the summary of the case filing. If you want to change any information on the page, click

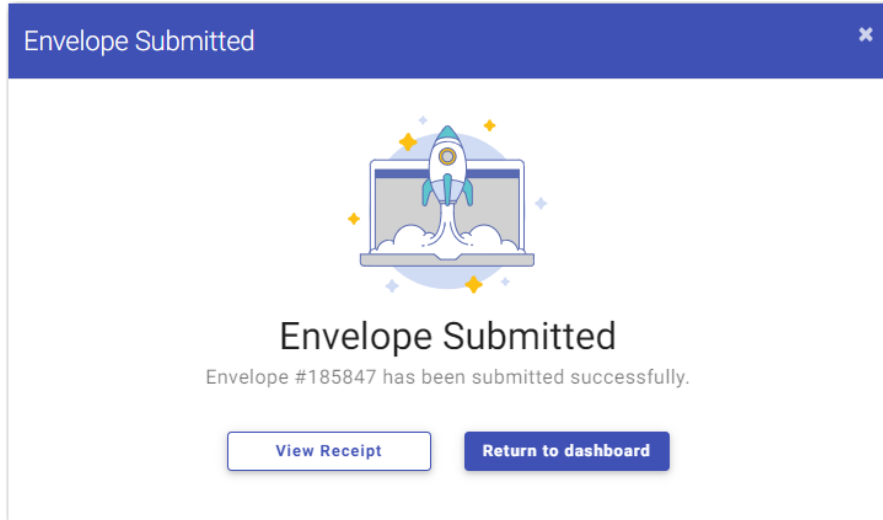


in the pane in which you want to change the information.

5. After you are satisfied with the information in your filing, click





The *Envelope Submitted* window is displayed.



**Figure 10.64 – Envelope Submitted Window**

6. In the *Envelope Submitted* window, do one of the following:

- Click . The *Printable Envelope Details* page is displayed in a separate tab. View the envelope details, and then close the tab.
- Click  to return to the *Dashboard* page.
- Click **x** to close the *Envelope Submitted* window. The *Dashboard* page is displayed.


## Viewing Case Address Information on the Summary Page

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.

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

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

To view the case address information in the envelope summary:


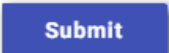
1. Complete the required information on the *Case Information* page, the *Parties* page, the *Filings* page, and the *Fees* page.
2. After you have completed the fields in each section, from the *Fees* page, click . The *Summary* page is displayed.

The screenshot shows the 'New Case Filing' Summary page with the following sections:

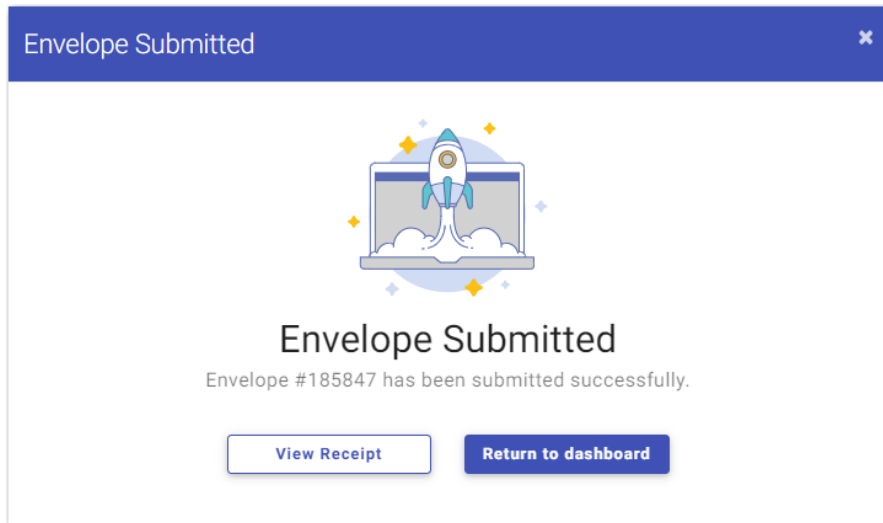
- Submission Agreements:** A checked box indicating agreement with the Rules for E-Filing.
- Case Information:** Court Location (OFS GA 2017), Case Type (Notice Of Removal), Case Category (Civil), and Case Address (555 Main Street, Dallas, TX 75221 US).
- Parties:** Party Type (Defendant), Party Name (John Smith), and Lead Attorney (Perry Mason).
- Filings:** Filing Code, Filing Type, Filing Description (Abstract Of Judgment), and Court Fee (eFile Only).
- Service Contacts:** Party Type (Defendant), Party Name (John Smith), and Service Contacts (Perry Mason).
- Fees:** Payment Account (Firm's New CC: 11202020), Party responsible (John Smith), and Filing Attorney (Perry Mason). A fee table is provided below.

Fee Type	Amount
Filing Fee	
Abstract Of Judgment	\$9.00
Opinion Fee	
Total Service Fees	\$1.00
Convenience Fee	\$1.00
Total Court Service Fees	\$1.00
<b>Grand Total</b>	<b>\$9.00</b>

Figure 10.65 – Case Address Information on the Summary Page



- If there are submission agreements for your filing, select the appropriate check boxes for the submission agreements.
- Review the summary of the case filing. If you want to change any information on the page, click  in the pane in which you want to change the information.
- After you are satisfied with the information in your filing, click . The *Envelope Submitted* window is displayed.





**Figure 10.66 – Envelope Submitted Window**

6. In the *Envelope Submitted* window, do one of the following:

- Click . The *Printable Envelope Details* page is displayed in a separate tab. View the envelope details, and then close the tab.
- Click  to return to the *Dashboard* page.
- Click **x** to close the *Envelope Submitted* window. The *Dashboard* page is displayed.

## View Case Judicial Officer

You can view the judicial officer who is assigned to a case from several locations in File & Serve.

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

The case judicial officer information is available on the following pages:

- *Envelope Details* page for initial and subsequent filings

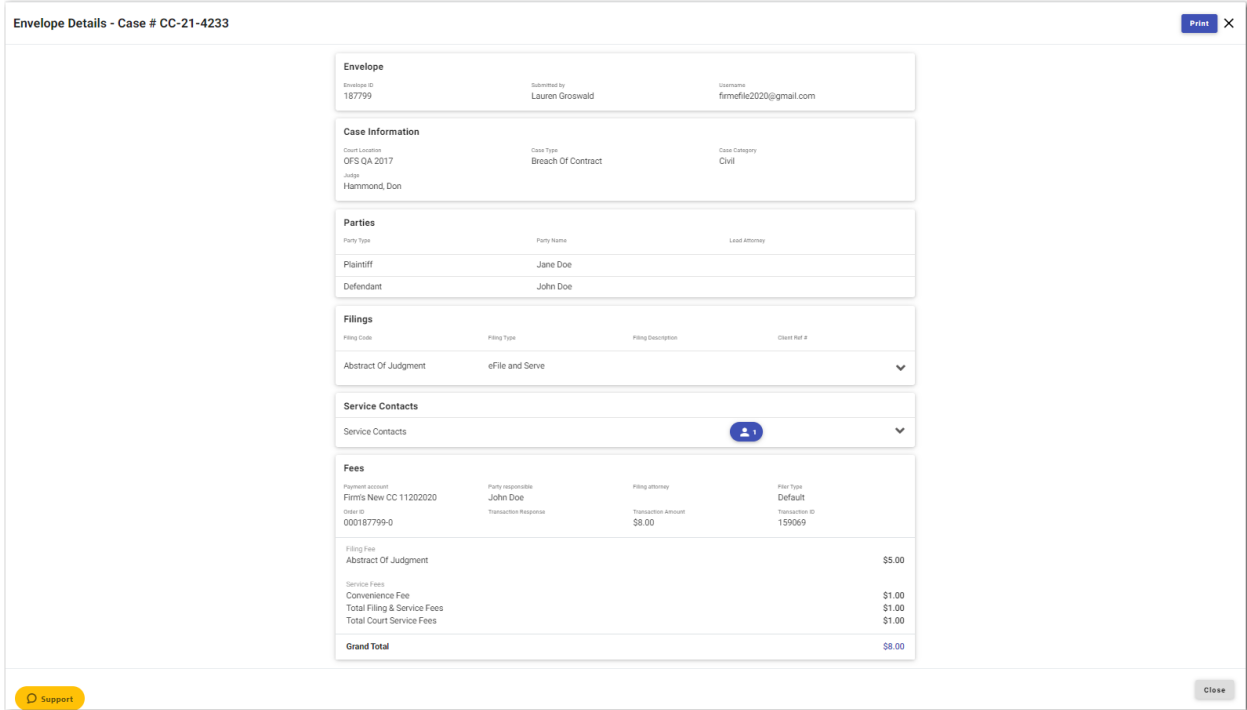


Figure 10.67 – Example of the Judge Information on the Envelope Details Page

- Summary page for subsequent filings

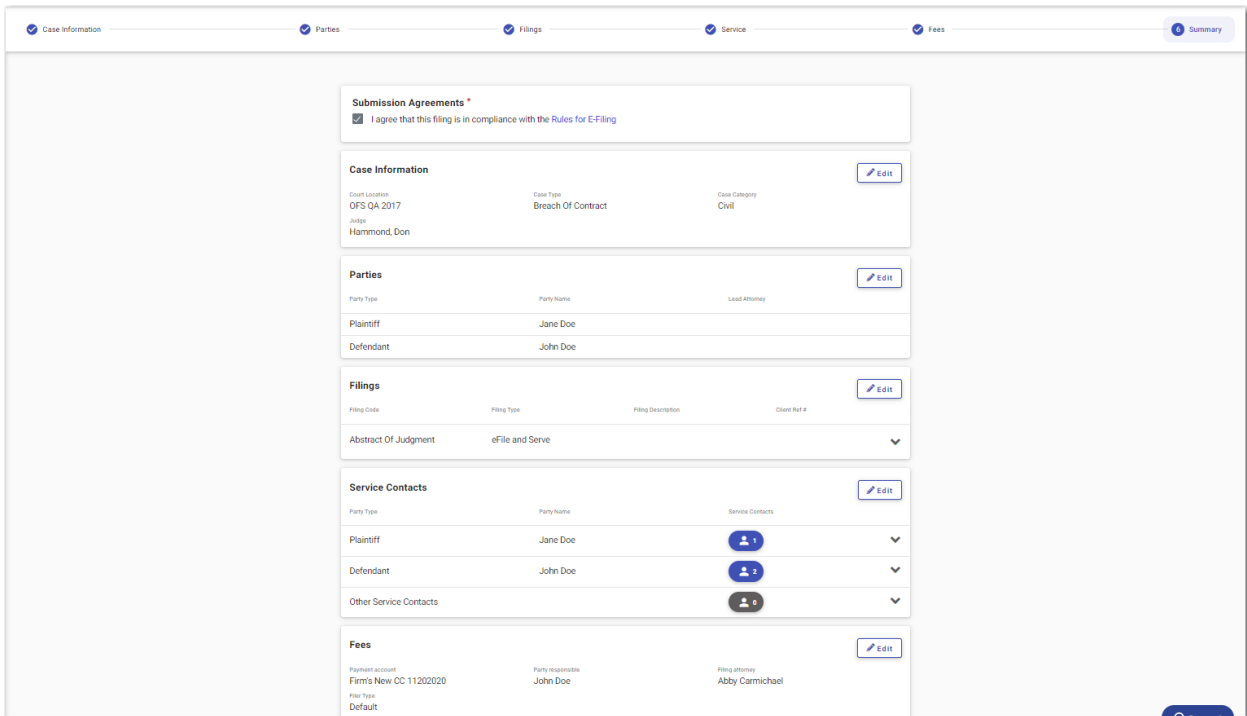


Figure 10.68 – Example of the Judge Information on the Summary Page

- Case Information page for subsequent filings

File Into Case Draft # 10445 - Case # CC-21-4233 - Judge Hammond, Don - Jane Doe, John Doe

1 Case Information  Parties 3 Filings 4 Service 5 Fees 6 Summary

### Case Information

Court location  
OFS QA 2017  
<https://www.hcdistrictclerk.com/Common/Civil/Efiling.aspx>

Case category  
**Civil**

Case type  
**Breach Of Contract**

Judge  
**Hammond, Don**

**Figure 10.69 – Example of the Judge Information on the Case Information Page**

- *Bookmarks* page for subsequent filings

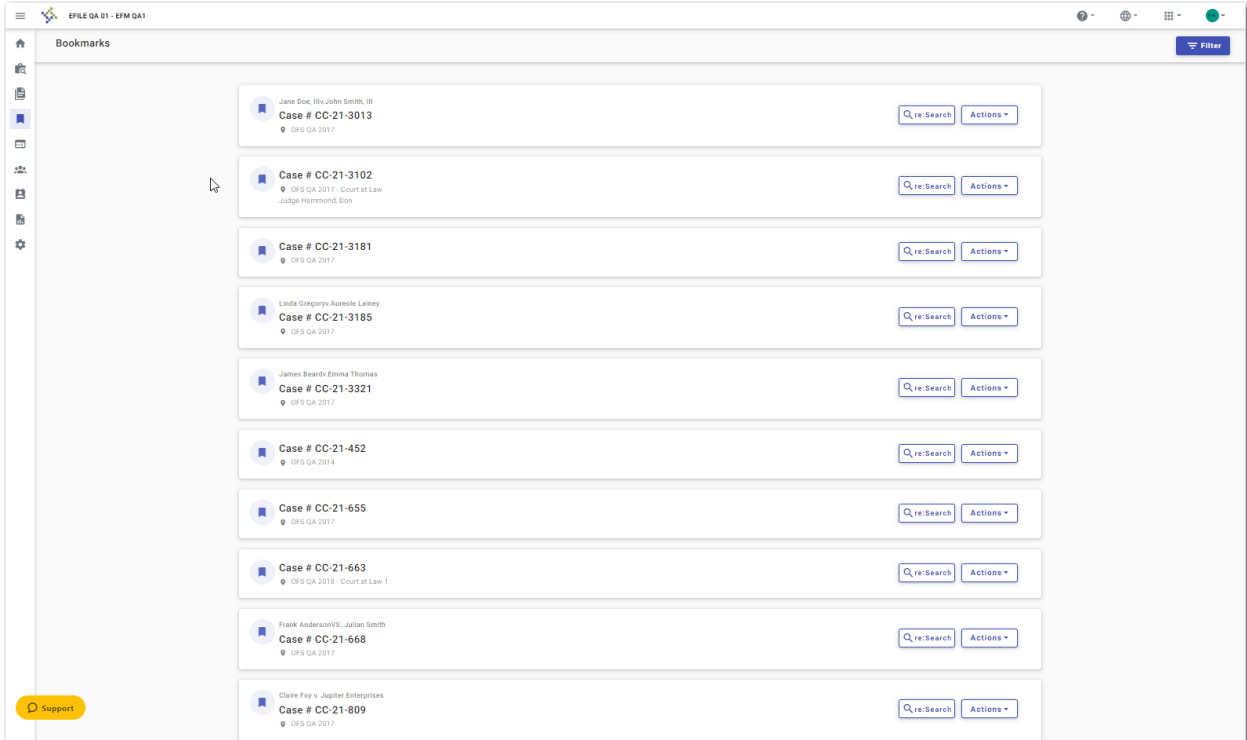


Figure 10.70 – Example of the Judge Information on the Bookmarks Page

## Capability for Hearing Dates

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

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

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

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

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

Schedule Hearing for Envelope #185887

Select	Date	Start	End
<input type="radio"/>	05/06/2022	8:00 AM	9:00 AM
<input type="radio"/>	05/06/2022	9:00 AM	10:00 AM
<input type="radio"/>	05/06/2022	10:00 AM	11:00 AM
<input type="radio"/>	05/06/2022	11:00 AM	12:00 PM
<input type="radio"/>	05/06/2022	12:00 PM	1:00 PM
<input type="radio"/>	05/06/2022	1:00 PM	2:00 PM
<input type="radio"/>	05/06/2022	2:00 PM	3:00 PM
<input type="radio"/>	05/06/2022	3:00 PM	4:00 PM
<input type="radio"/>	05/06/2022	4:00 PM	5:00 PM
<input type="radio"/>	05/07/2022	8:00 AM	9:00 AM

Previous **1** 2 3 4 5 Next 45 Result(s) Page 1 of 5

Figure 10.71 – Example of a Schedule Hearing Page

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

## Scheduling a Hearing Date for a New Case Filing

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

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

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

To schedule a hearing for a new case filing:

1. From the *Dashboard* page, click

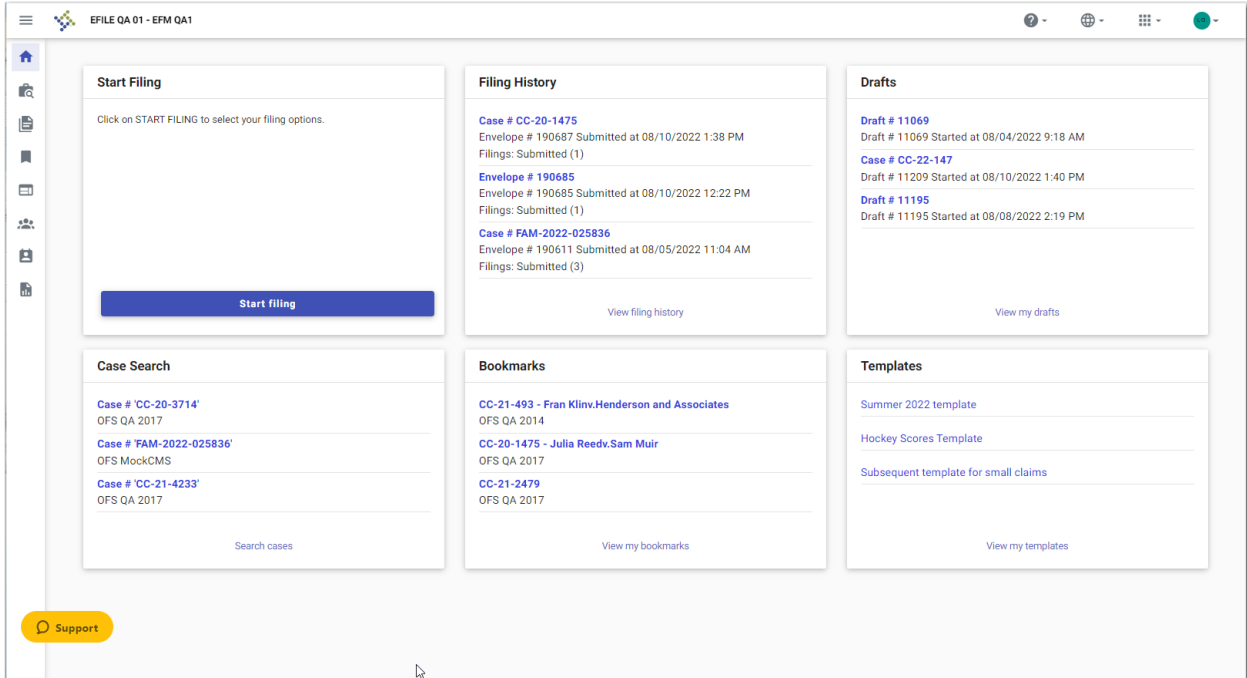


Figure 10.72 – Example of a Dashboard Page

The *Start Filing* page is displayed.

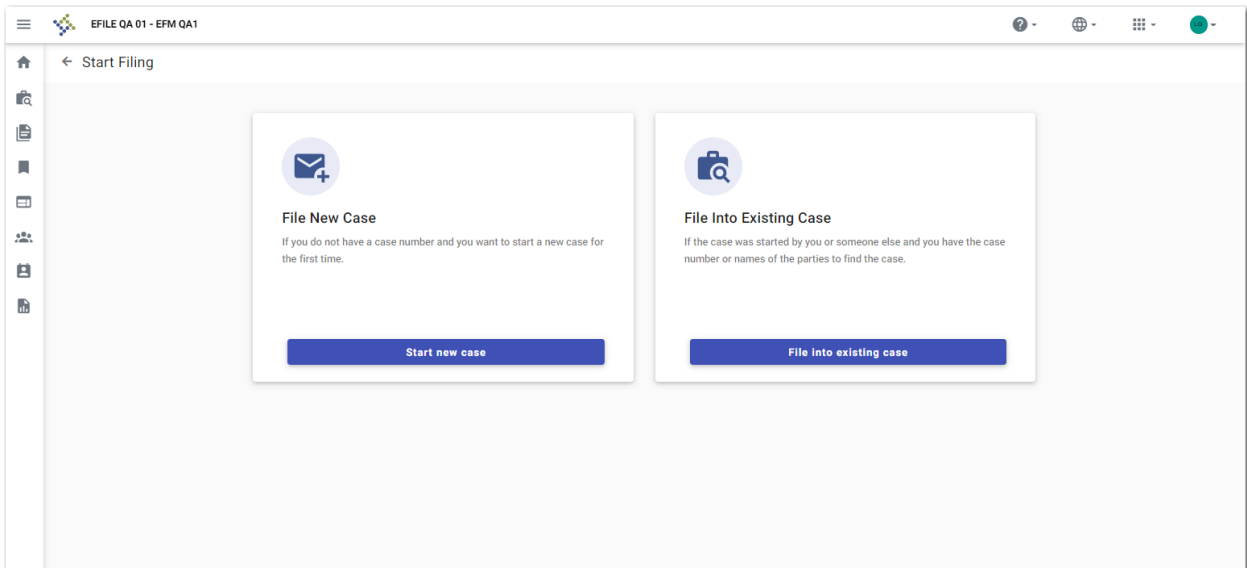


Figure 10.73 – Start Filing Page

2. Click



The *Case Information* page is displayed.

Figure 10.74 – Case Information Page

- Complete the details for the case by completing the fields on the *Case Information* page, and then click

**Parties →**

The *Parties* page is displayed.

Party Type	Party Name	Lead Attorney	Actions
Defendant *	+ Add party details		
Plaintiff *	+ Add party details		

+ Add More

Figure 10.75 – Parties Page

- Complete the fields on the *Parties* page, and then click

**Filings →**

The *Filings* page is displayed.

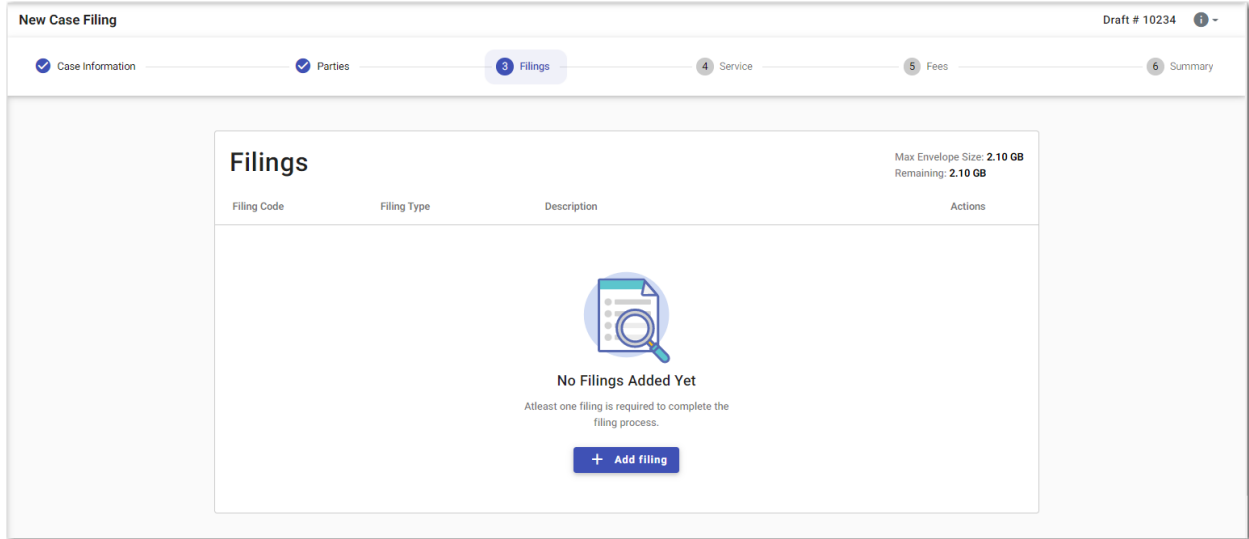


Figure 10.76 – Filings Page

5. On the *Filings* page, click **+ Add filing**. Then complete the required fields, as applicable.
6. Click **Service →**.  
The *Service* page is displayed.
7. Select the service contacts, and then click **Fees →**.  
The *Fees* page is displayed.
8. Complete the fields on the *Fees* page, and then click **Summary →**.  
The *Summary* page is displayed.



**Return Date**  
 To Of Date Service  
  
 Return Date: 06/14/2022

**Case Information**   
 Case Name: QP's MockCMS Case Type: Negligence Case Category: Civil

**Return Date**  
 Return Date: 06/14/2022

**Parties**   

Party Type	Party Name	Lead Attorney
Defendant	John Doe	Abby Carmichael
Plaintiff	Sally Smith	Perry Mason

**Filings**   

Filing Code	Filing Type	Filing Description	Case Ref #
Abstract Of Judgment	efile Only		

**Service Contacts**   

Party Name	Party Name	Service Contacts
Defendant	John Doe	<input type="button" value="add"/>
Plaintiff	Sally Smith	<input type="button" value="add"/>
Other Service Contacts		<input type="button" value="add"/>

**Fees**   

Payment Account	Party responsible	Filing Attorney
Firm's New CC: 11202020	John Doe	Abby Carmichael
Fee Type		
Default		
Filing Fee		
Abstract Of Judgment		\$5.00
Service Fees		
Total Service Fees		\$1.00
Convenience Fee		\$1.00
Total Court Service Fees		\$1.00

Figure 10.77 – Example of a Summary Page

9. Complete the required fields on the *Summary* page, and verify all of the information. Then, click



The *Schedule Hearing* window is displayed.


Schedule Hearing for Envelope #185887

Select	Date	Start	End
<input type="radio"/>	05/06/2022	8:00 AM	9:00 AM
<input type="radio"/>	05/06/2022	9:00 AM	10:00 AM
<input type="radio"/>	05/06/2022	10:00 AM	11:00 AM
<input type="radio"/>	05/06/2022	11:00 AM	12:00 PM
<input type="radio"/>	05/06/2022	12:00 PM	1:00 PM
<input type="radio"/>	05/06/2022	1:00 PM	2:00 PM
<input type="radio"/>	05/06/2022	2:00 PM	3:00 PM
<input type="radio"/>	05/06/2022	3:00 PM	4:00 PM
<input type="radio"/>	05/06/2022	4:00 PM	5:00 PM
<input type="radio"/>	05/07/2022	8:00 AM	9:00 AM

Previous **1** 2 3 4 5 Next 45 Result(s) Page 1 of 5

Do not schedule Save

Figure 10.78 – Example of a Schedule Hearing Window

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

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

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

**Note:** If you want to schedule your hearing at another time, click .

## Scheduling a Hearing for an Existing Case Filing

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

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

To schedule a hearing for an existing case filing:

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

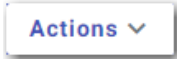
The *Filing History* page is displayed.

The screenshot displays the 'Filing History' page in the EFILE OA 01 - EFM OA1 system. The page shows a list of filings with the following details:

Submitted	Submitted By	Case #	Envelope #	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #
Aug 10, 2022 6:38:50 PM	Lauren Groswald	CC-20-1475	190687	Submitted	Application	eFile Only		
Aug 10, 2022 5:23:10 PM	Lauren Groswald Filing Attorney Jack Stone	CC-22-147	190685	Accepted	Action - Initial Only	eFile and Serve		
Aug 5, 2022 5:32:48 PM	Lauren Groswald Filing Attorney Abby Carmichael	Envelope # 190634	190634	Submitted	Complaint for Repossession of Rent	eFile Only	Landlord / Tenant Case Filing	1
Aug 5, 2022 4:04:42 PM	Lauren Groswald Filing Attorney Abby Carmichael	FAM-2022-025836	190611					

Figure 10.79 – Example of a Filing History Page

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

3. Click .

4. From the actions menu, select **Envelope details**.

The envelope details are displayed.

Envelope Details

[Schedule Hearing](#)
[Print](#)
✕

Envelope			
Envelope ID 191830	Submitted by Lauren Groswald	Username [redacted]@gmail.com	

Case Information		
Court Location QFS MockCMS	Case Type Other Family Law Matters	Case Category Family

Return Date	
Return Date 09/23/2022	

Parties		
Party Type	Party Name	Lead Attorney
Petitioner	Ward Jones	Abby Carmichael
Respondent	Sally Jones	Harvey Birdman

Filings			
Filing Code	Filing Type	Filing Description	Client Ref #
Abstract Of Judgment	eFile Only		

Service Contacts	
Service Contacts	[Add Contact Icon]

Fees			
Payment account Laurens CC 7.25.22	Party responsible Ward Jones	Filing attorney	File Type Default
Order ID 000191830-0	Transaction Response	Transaction Amount \$8.00	Transaction ID 163425
Filing Fee Abstract Of Judgment			\$5.00
Service Fees			
Convenience Fee			\$1.00
Total Filing & Service Fees			\$1.00
Total Court Service Fees			\$1.00
<b>Grand Total</b>			<b>\$8.00</b>

Support

[Schedule Hearing](#)
[Close](#)

Figure 10.80 – Example of an Envelope Details Page

- Click Schedule Hearing.

The *Schedule Hearing* page is displayed.

Schedule Hearing for Envelope #185887

Select	Date	Start	End
<input type="radio"/>	05/06/2022	8:00 AM	9:00 AM
<input type="radio"/>	05/06/2022	9:00 AM	10:00 AM
<input type="radio"/>	05/06/2022	10:00 AM	11:00 AM
<input type="radio"/>	05/06/2022	11:00 AM	12:00 PM
<input type="radio"/>	05/06/2022	12:00 PM	1:00 PM
<input type="radio"/>	05/06/2022	1:00 PM	2:00 PM
<input type="radio"/>	05/06/2022	2:00 PM	3:00 PM
<input type="radio"/>	05/06/2022	3:00 PM	4:00 PM
<input type="radio"/>	05/06/2022	4:00 PM	5:00 PM
<input type="radio"/>	05/07/2022	8:00 AM	9:00 AM

Previous **1** 2 3 4 5 Next 45 Result(s) Page 1 of 5

**Figure 10.81 – Example of a Schedule Hearing Page**

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

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

# 11 Auto Generated Documents

## Topics covered in this chapter

- ◆ Collecting Additional Data on the Case Information Page
- ◆ Entering Service of Process Information on the Parties Page
- ◆ Entering Filing Details for Service of Process Cases
- ◆ Entering Payment Information
- ◆ Viewing the Envelope Summary for Service of Process Cases
- ◆ Viewing the Envelope Details for Service of Process Cases

File & Serve automatically generates some case-related documents based on configuration. When auto generation of documents is configured, you can enter additional data for an initial filing on the *Case Information* page. Also, you can select Service of Process options on the *Parties* page.

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

**Note: The Auto Generated Documents feature is generally used when the case category is for a civil or family case.**

After you complete the additional fields on the *Case Information* page, and complete all of the required fields for your filing, documents containing the additional information are generated. You can view the completed documents on the *Summary* page and in the envelope details.

## Collecting Additional Data on the Case Information Page

When the Civil Domestic Information feature is configured, you can enter additional data for an initial filing on the *Case Information* page.

**Note: The Civil Domestic Information feature is configured by Tyler and may not be available on your system. In addition, some of the fields described in this section may not be displayed on your system.**

**Note: The Civil Domestic Information feature is used when the case category is for a civil or family case.**

### Case Information

**Court location\***  
 x ▼

This is the court where you are filing your case.  
[https://www.collincountytx.gov/district\\_courts/Pages/default.aspx](https://www.collincountytx.gov/district_courts/Pages/default.aspx)

**Case category\***  
 x ▼

This is the type of case you are filing (Family, Probate, or Civil).

**Case type\***  
 x ▼

If you can't find your case type, change the case category to see other case types.

---

**Damage Amount**  
 Damage Amount

**Procedure/Remedies**  
 Select all that apply

---

**Civil Domestic Information**

If the action is related to another action(s) pending or previously pending in this court involving some or all the same parties, subject matter, or factual issues, enter the related case numbers:

I hereby certify that the documents in this filing, including attachments and exhibits, satisfy the requirements for redaction of personal or confidential information in OCGA § 9-11-7.1.

Do you or your client need any disability accommodations? If so, please describe the accommodation request.

**Figure 11.1 – Civil Domestic Information Section on the Case Information Page**



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

To collect additional data on the *Case Information* page:

1. Select the location from the **Court Location** drop-down list.
2. Select the case category from the **Case Category** drop-down list.
 

**Note:** The case category that you select must be **Civil** or **Family**.
3. Select the case type from the **Case Type** drop-down list.
4. In the **Damage Amount** section, if applicable, select the damages amount from the **Damage Amount** drop-down list.
5. In the **Procedure/Remedies** section, select the appropriate procedures or remedies from the drop-down list.
6. In the **Civil Domestic Information** section, enter any related case numbers in the **Related case** field.
7. Enter additional related case numbers in the **Additional related case** field.
8. Select each check box that is applicable.

- If there is a disability accommodation to note, describe the accommodation in the **Accommodation request** field.



- Click  to save your work and continue.

## Entering Service of Process Information on the Parties Page

After you have collected additional information on the *Case Information* page, you must enter the Service of Process information on the *Parties* page.

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

**Note: The Service of Process feature is used when the case category is for a civil or family case.**

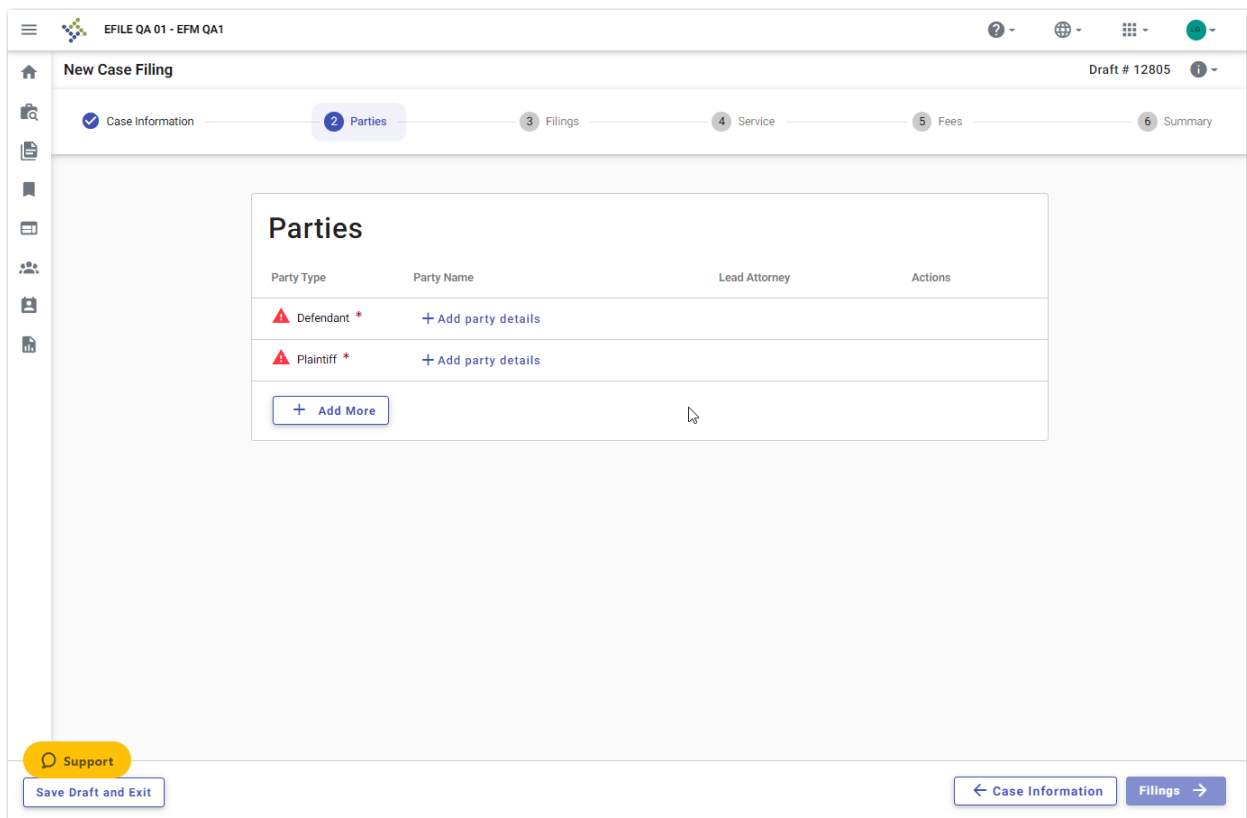
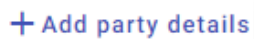


Figure 11.2 – Example of a Parties Page

To enter Service of Process information on the *Parties* page:

- On the *Parties* page, select the party type that you want to begin to describe, and then click




The *Edit Party Details* window for the specified party is displayed.




2. Click either  or .

**Note: The following steps describe the fields that are displayed if you select “Person.”**

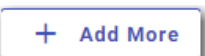
3. In the Party Information pane, complete the **First Name**, **Middle Name** (if applicable), and **Last Name** fields. Also, if appropriate, select the party’s suffix from the **Suffix** drop-down list.
4. Type the party’s date of birth in the **Date of Birth** field, or click  to select the date from the calendar.
5. Type the party case management system identification (ID) in the **Party CMS ID** field, if appropriate.
6. Select a language from the **Interpreter** drop-down list, if appropriate.
7. Select the type of driver’s license from the **Drivers License Type** drop-down list.
8. Select the state where the driver’s license was issued from the **Drivers License State** drop-down list.
9. Type the party’s driver’s license number in the **Drivers License Number** field.
10. Type the party’s Social Security number in the **Social Security Number** field.


**Note: After you type the Social Security number, asterisks are displayed to hide the number.**

11. Select the party’s gender from the **Gender** drop-down list.
12. If available, select an option from the **Service of Process** drop-down list.
13. In the Contact Information pane, enter the country, address, city, state, ZIP code, and phone number for the specified party.
14. In the Attorney Information pane, from the **Lead Attorney** drop-down list, select the filing attorney.
15. From the next field that is displayed, select additional attorneys, if any, that you want to add to the case.

16. After all of the required fields for the specified party are completed, click .

17. On the *Parties* page, complete the party information for the next party.

18. If you have another party to add to the case, click , and complete the party information for the additional party. Continue to add parties until all of the parties have been added to the case.

19. Click  to save your work and continue.

## Entering Filing Details for Service of Process Cases

You can enter the filing details on the *Filings* page. When you have entered additional information on the *Case Information* page, the auto-generated documents associated with your filing are displayed in the Auto Generated Filings pane on the *Filings* page.

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

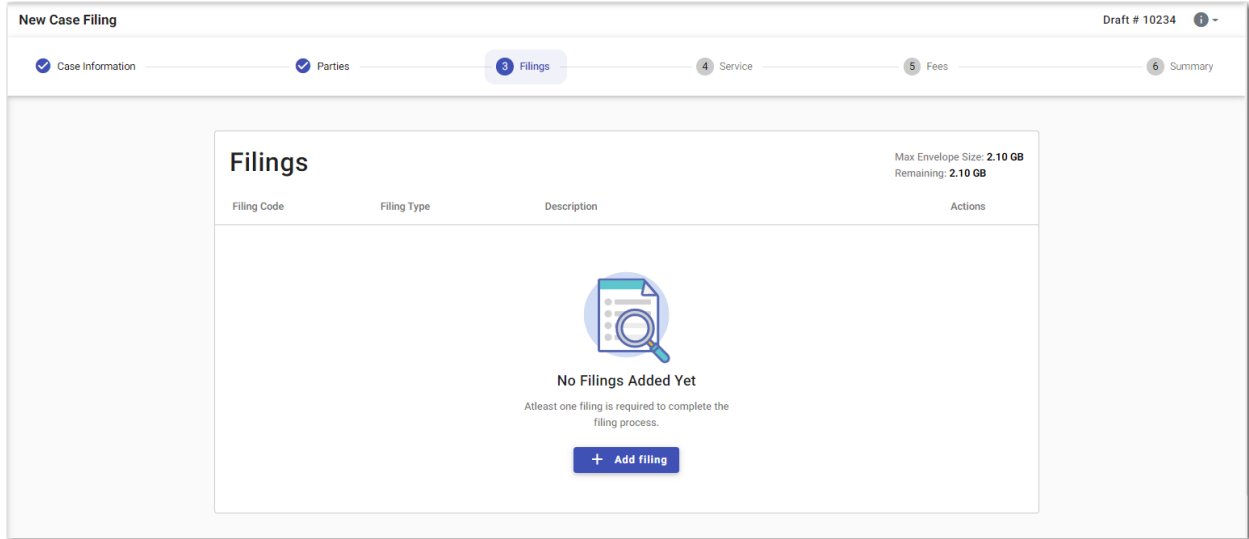


Figure 11.3 – Filings Page

Auto Generated Filings		
The following filings and documents were automatically generated.		
Filing Code	Filing Description	Document Name
⚡ Action - Initial Only	Case Information	Civil Domestic Filing Form1.pdf
⚡ Abstract Of Judgment	Sheriff's Entry of Service for James Doe	SheriffsEntryOfService for James Doe.pdf
⚡ Petition (Open Case)	Summons for James Doe	SUMMONS for James Doe.pdf

Figure 11.4 – Example of an Auto Generated Filings Pane

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

To enter the filing details:

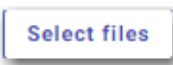
1. On the *Filings* page, click  .  
The *Edit Filing Details* page is displayed.

The screenshot shows the 'Edit Filing Details' page for a 'New Case Filing'. The page has a top navigation bar with steps: Case Information, Parties, Filings (active), Service, Fees, and Summary. Below this is a blue header for 'Edit Filing Details'. The main content area is divided into three tabs: 'Filing Requirements' (active), 'Additional Services', and 'Communications'. The 'Filing Requirements' tab contains several sections:
 

- Filing Type \* (Required)**: Two radio button options: 'eFile Only' (selected) and 'eFile and Serve'. Below 'eFile Only' is the instruction: 'Pick "eFile Only" to just electronically file your papers.' Below 'eFile and Serve' is the instruction: 'Electronically file your papers with the court and have your documents sent to the selected service contacts.'
- Filing Information**: A 'Filing Code \*' dropdown menu with 'Select...' as the current value. Below it are text input fields for 'Client Reference Number' and 'Filing Description'. A 'Comments to Court' section with the placeholder 'add comment here' and a small icon for adding comments. Below that is a 'Filing on behalf of' dropdown menu with 'Select' as the current value.
- Upload Documents**: A section with the instruction: 'To add more than one lead document to the filing, create another filing and upload your document.' Below this is a note: 'Select a Filing code to enable adding documents.'

Figure 11.5 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.
5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.



8. In the Upload Documents pane, click . Then, select the document that you want to upload.

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

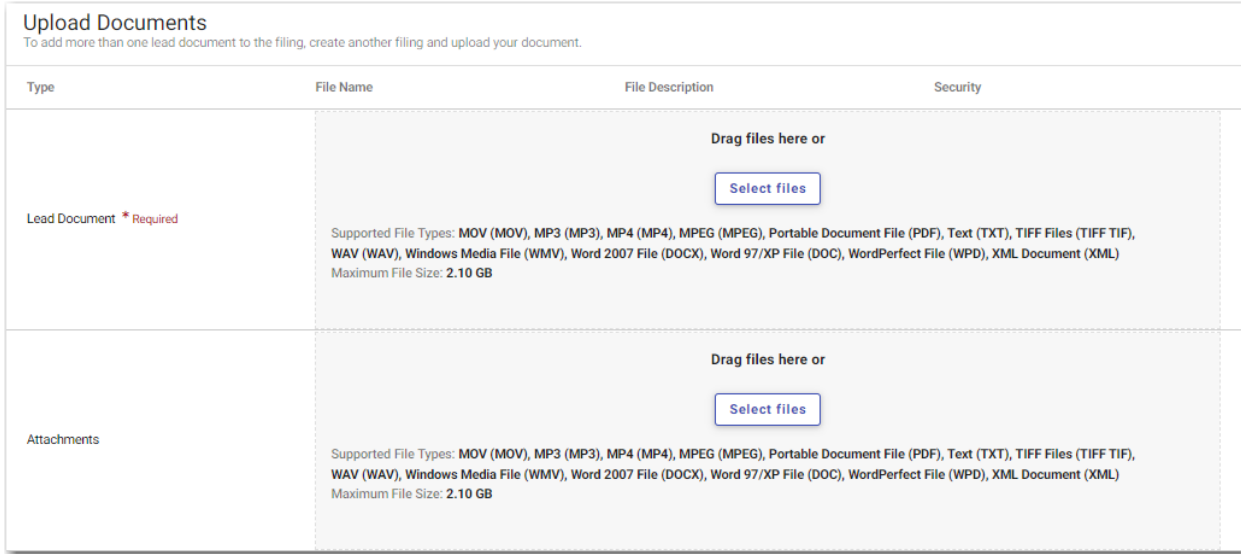
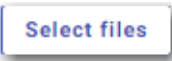


Figure 11.6 – Upload Documents Pane

9. If you have attachments to add to the filing, click  in the **Attachments** section. Then, upload the specified attachments.
10. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
11. To add additional services, click **Additional Services**.

The Additional Services pane is displayed.

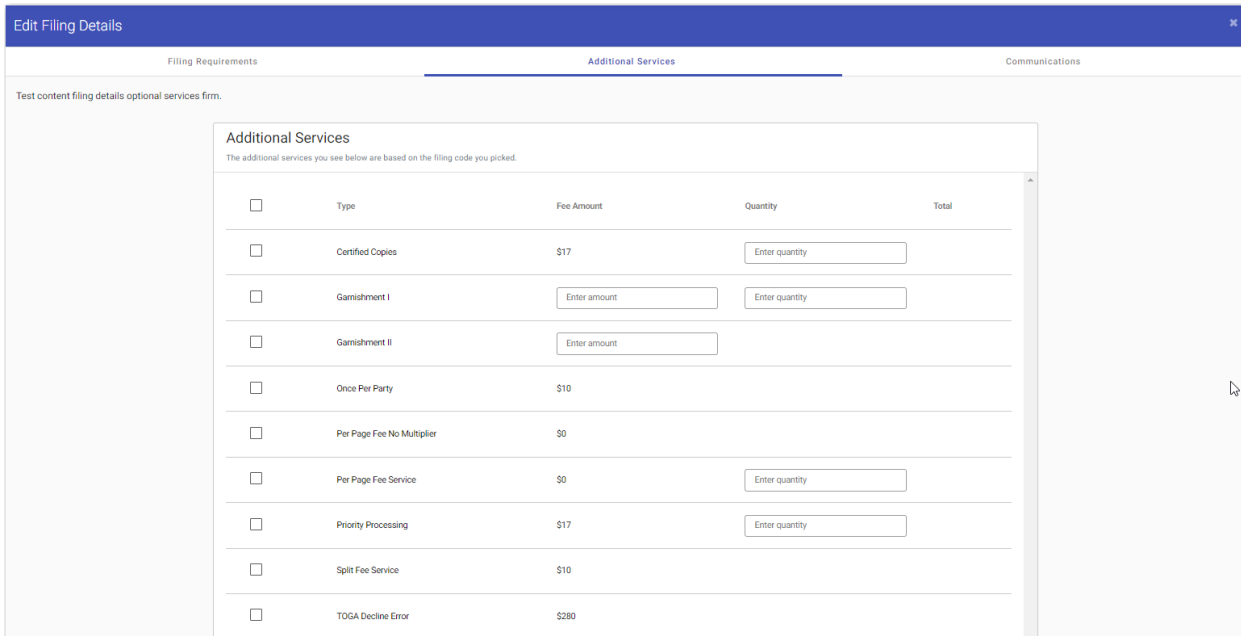


Figure 11.7 – Additional Services Pane on the Edit Filing Details Page

12. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

13. Click **Go to Communication**, or click **Communications** at the top of the page.

The Communications pane is displayed.

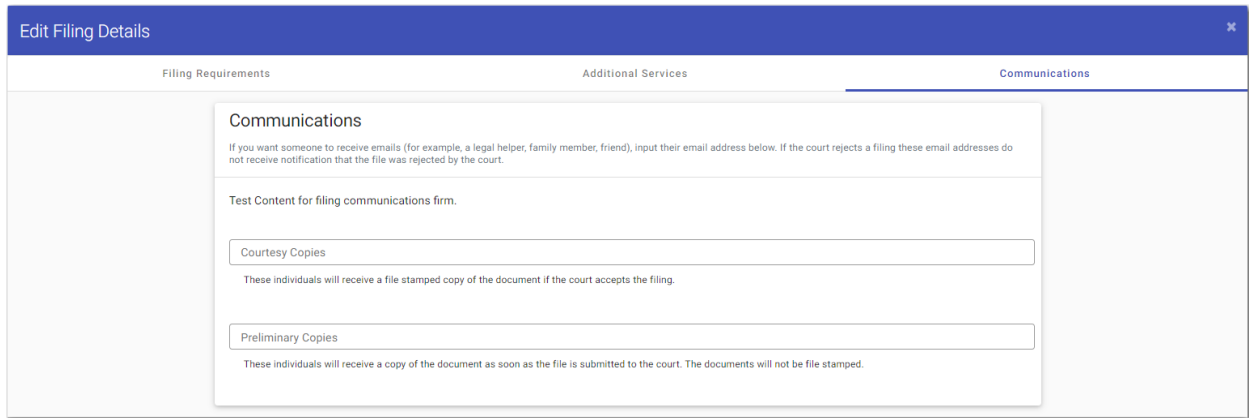


Figure 11.8 – Communications Pane on the Edit Filing Details Page

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

15. Click **Save**.

16. If you want to add another filing, on the *Filings* page, click **+ Add More**. Then, repeat the same steps for the next filing.

17. After you have added all of the filings, click **Service →**.

## Entering Payment Information

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

**Note: If your firm does not already have a payment account, you can create an account on the *Fees* page.**

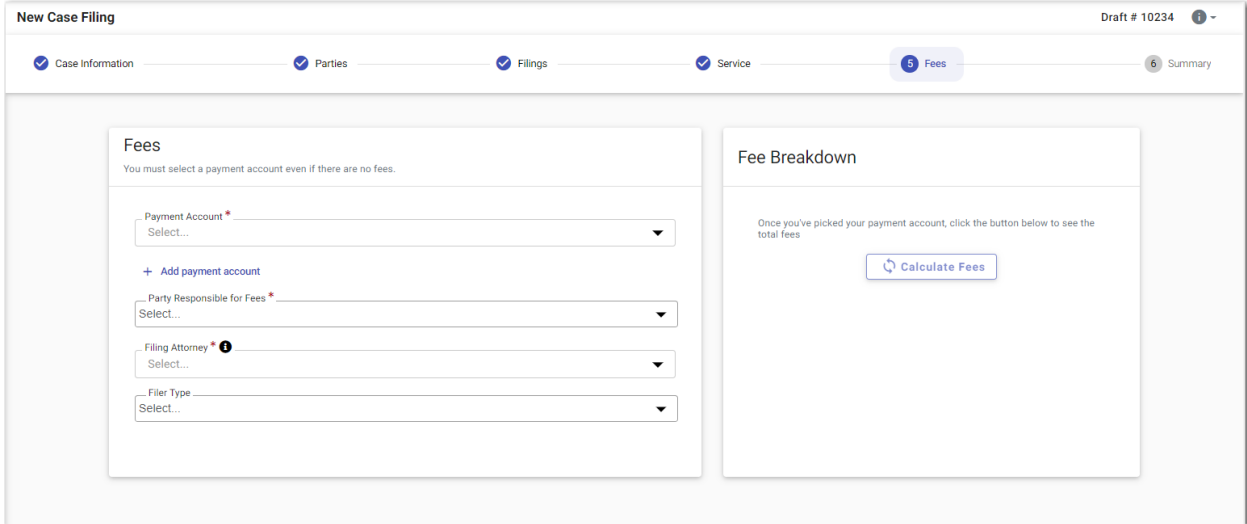


Figure 11.9 – Example of a Fees Page

To enter the payment information for your filing:

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

If you do not have an existing payment account, click . Additional fields are displayed. Then, follow the steps to create a new payment account.

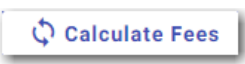
Refer to the following topics for details on creating the various types of payment accounts:

- [Adding a Credit Card Payment Account, page 58](#)
- [Adding an E-Check Payment Account, page 62](#)
- [Adding a Draw-Down Account, page 66](#)

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

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

3. Select the filing attorney from the **Filing Attorney** drop-down list.
4. Select the filer type from the **Filer Type** drop-down list.

5. In the Fee Breakdown pane, click .

The fees for the filing are displayed.

**New Case Filing** Draft # 10494

Case Information  Parties  Filings  Service  **Fees**  Summary

**Fees**  
You must select a payment account even if there are no fees.

Payment Account \*  
Firm's New CC 11202020 Credit Card x

+ Add payment account

Party Responsible for Fees \*  
John Doe

Filing Attorney \*  
Abby Carmichael x

Filer Type  
Default

**Fee Breakdown** [Calculate Fees](#)

Case Initiation Fee	
Other Civil	\$5.00
Filing Fee	
Abstract Of Judgment	\$5.00
Service Fees	
Total Service Fees	\$1.00
Convenience Fee	\$1.00
Total Court Service Fees	\$1.00
<b>Grand Total</b>	<b>\$13.00</b>

**Figure 11.10 – Example of a Fees Page with the Filing Fees Displayed**

If you selected mail service for your filing, the mail service fees are displayed on the *Fees* page.

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

[Summary →](#)

6. Review the filing fees, and then click

## Viewing the Envelope Summary for Service of Process Cases

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

**Note: The Service of Process feature and the Auto Generated Documents feature are configured by Tyler and may not be available on your system.**

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

To view the envelope summary:

1. Complete the required information on the *Case Information* page, the *Parties* page, the *Filings* page, and the *Fees* page.

[Summary →](#)

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

The *Summary* page is displayed.

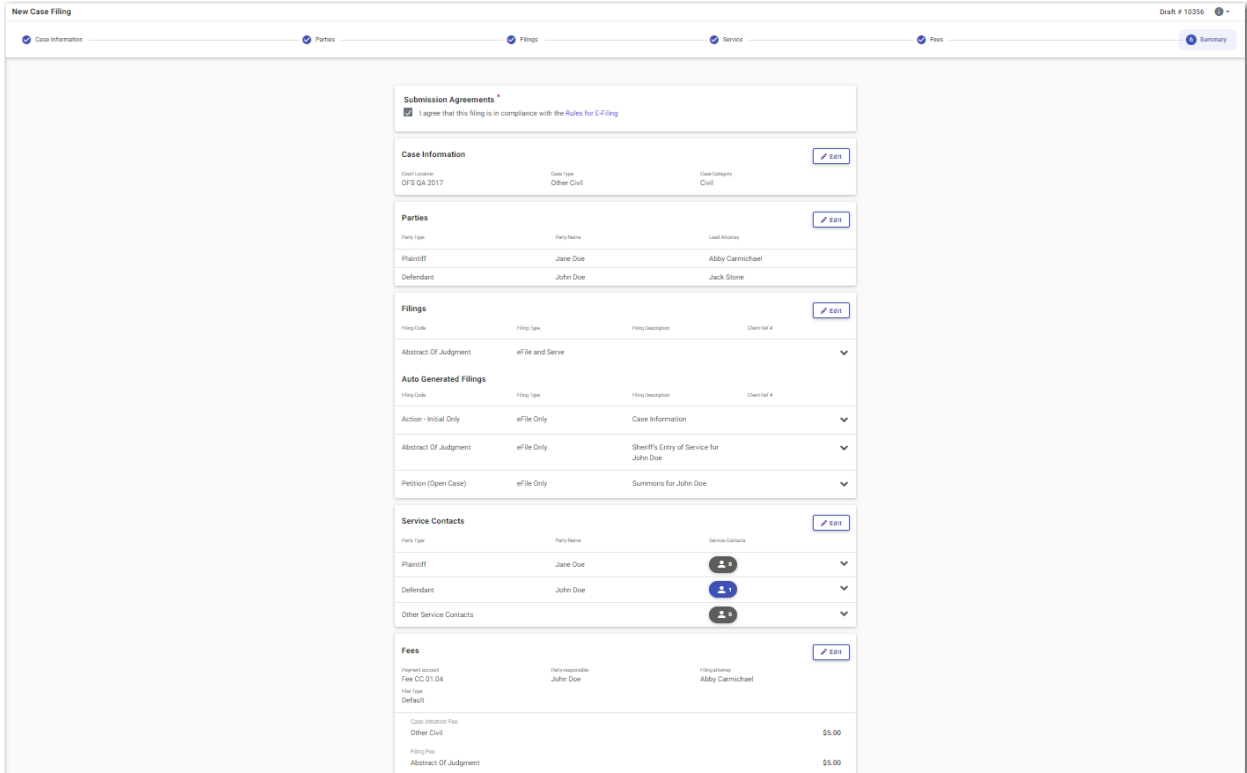


Figure 11.11 – Example of a Summary Page

3. If there are submission agreements for your filing, select the appropriate check boxes for the submission agreements.
4. Review the summary of the case filing. If you want to change any information on the page, click



in the pane in which you want to change the information.

5. After you are satisfied with the information in your filing, click



The *Envelope Submitted* window is displayed.



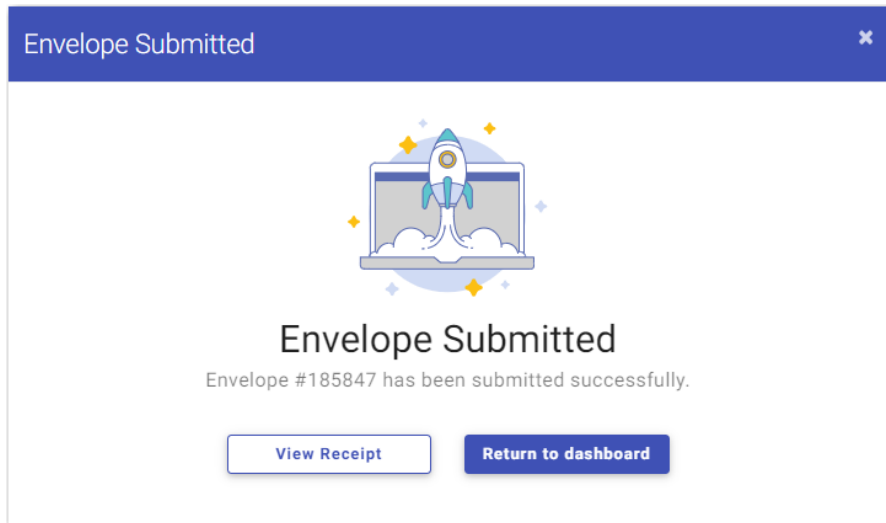




Figure 11.12 – Envelope Submitted Window

6. In the *Envelope Submitted* window, do one of the following:

- Click . The *Printable Envelope Details* page is displayed in a separate tab. View the envelope details, and then close the tab.
- Click  to return to the *Dashboard* page.
- Click **x** to close the *Envelope Submitted* window. The *Dashboard* page is displayed.

## Viewing the Envelope Details for Service of Process Cases

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

**Note: The Service of Process feature and the Auto Generated Documents feature are configured by Tyler and may not be available on your system.**

To view the envelope details:

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

The *Filing History* page is displayed.

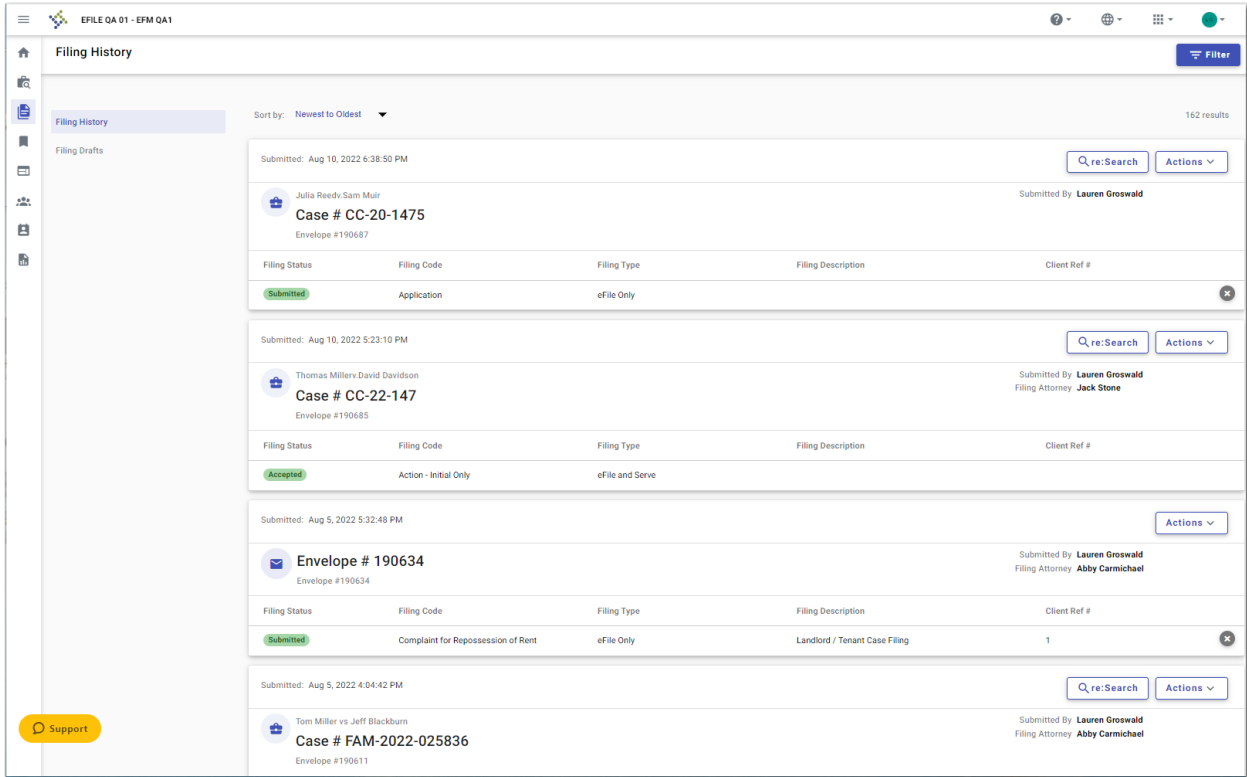


Figure 11.13 – Example of a Filing History Page

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

3. Click .

4. From the actions menu, select **Envelope details**.

The envelope details are displayed.

Envelope Details
Print
✕

Envelope		
Envelope ID 187789	Submitted by Lauren Groswald	Username [redacted]@gmail.com

Case Information		
Client Location OFS QA 2017	Case Type Other Civil	Case Category Civil

Parties		
Party Type	Party Name	Lead Attorney
Defendant	Sherry Doe	Perry Mason
Plaintiff	John Doe	Jack Stone

Filings			
Filing Code	Filing Type	Filing Description	Client Ref #
Action - Initial Only	eFile Only		▼
Petition (Open Case)	eFile Only		▼
Abstract Of Judgment	eFile Only		▼
Abstract Of Judgment	eFile Only		▲
Submitted Date 06/06/2022 2:15 PM	Status Submitted	Review Date	
Courtesy Copy Email	Preliminary Copy Email		

Type	Document Name	Description
Lead Document	SherrysEntryOfService for Sherry Doe.pdf	

[Original document](#)

Service Contacts	
Service Contacts	

Fees			
Payment account Firm's New CC 11202020	Party responsible Sherry Doe	Filing attorney	Filer Type Default
Address	Transaction Reference	Transaction Amount	Transaction ID

? Support

Figure 11.14 – Example of an Envelope Details Page

- Click Print to print a copy of the envelope details.

# 12 Redaction Feature

## Topics covered in this chapter

### ◆ Entering a Filing with Redacted Documents

File & Serve supports the Redaction feature. Redaction refers to the removal or obscuring of sensitive information, such as Social Security numbers. Filers can redact a document, view the redacted document, and then make modifications, if necessary, before uploading the redacted document to the case management system.

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

**Note: You can perform redactions in the *Content Manager* window. This window opens in a separate tab in your browser. You must enable pop-ups in your browser settings to view the *Content Manager* window and to perform redactions.**

Depending on your configuration, a transactional redaction fee may be applied to each document in your envelope. If a fee is applied, the amount is displayed on the *Filings* page, on the *Fees* page, on the *Summary* page, and in the envelope details.

The following data is automatically redacted from documents:

- Social Security numbers
- Tax ID numbers (EINs)
- Passport numbers
- Credit card numbers
- Driver's license numbers
- Account numbers
- Government ID numbers
- Names of minors listed as parties on the case
- Dates of birth of minors
- Addresses of minors listed on the case

# Entering a Filing with Redacted Documents

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

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

**Note: Your court may charge a transactional redaction fee for each document that you redact.**

To enter a filing with redacted documents:

1. On the *Dashboard* page, click  .

The *Start Filing* page is displayed.

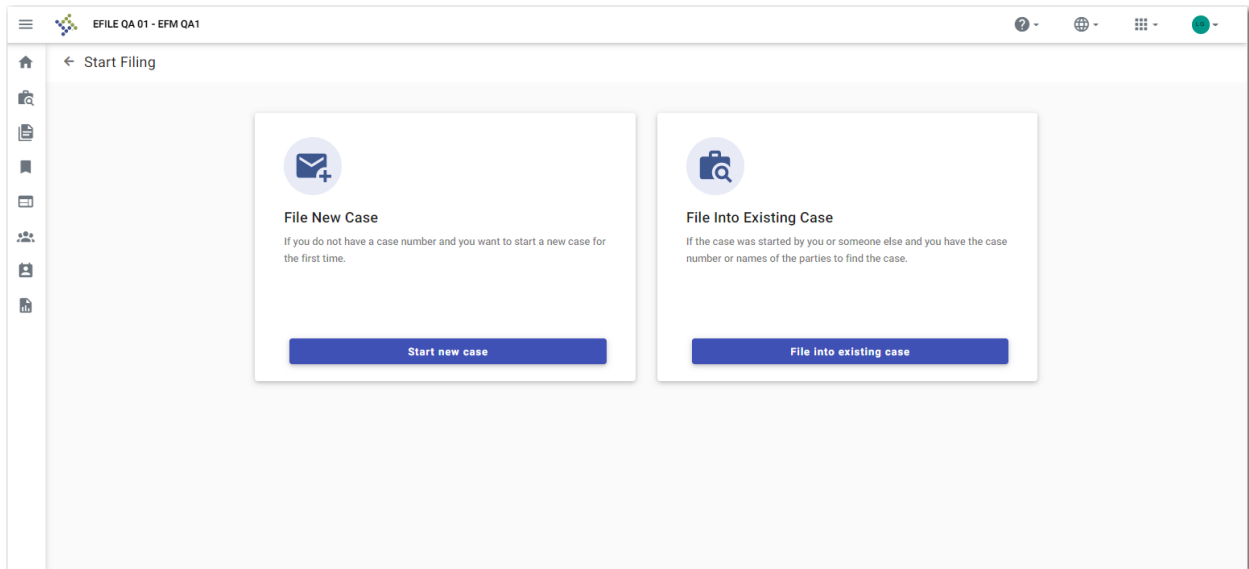
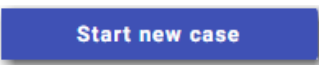



Figure 12.1 – Start Filing Page

2. Click  .

The *Case Information* page is displayed.

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

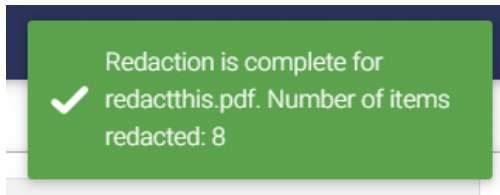
The *Parties* page is displayed.

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


The *Filings* page is displayed.


5. On the *Filings* page, complete the required fields. Upload a lead document and attachments, if applicable. Then, click  .

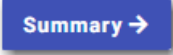
**Note:** When your document has been successfully redacted, a green message is displayed, indicating that the redaction was completed. The message also indicates how many redactions were performed.




**Figure 12.2 – Example of a Message for a Completed Redaction**

6. After you have completed all of the required fields on the *Filings* page and uploaded the applicable documents, click . The *Service* page is displayed.


7. Complete the required fields on the *Service* page, and then click . The *Fees* page is displayed.

8. Complete the required fields on the *Fees* page, and then click . The *Summary* page is displayed.

9. Review the envelope summary. If you want to edit the redacted document, click .

The *Content Manager* window opens in a new tab in your browser.

10. Perform the necessary edits in the *Content Manager* window, and then save your changes.

11. When you are done reviewing the envelope summary and have selected the check boxes for the submission agreements (if applicable), click .

**Note:** After submission, you can view the redaction fees on the *Envelope Details* page.

# 13 File into an Existing Case


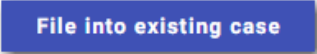
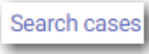
## Topics covered in this chapter

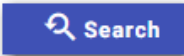
- ◆ Filing into an Existing Case from the Dashboard Page
- ◆ Filing into an Existing Case from the Filing History Page
- ◆ Filing into a Non-Indexed Case
- ◆ Creating a Service Only Filing

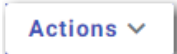
Once a court has created a new case, you can file into the existing case.

There are various ways to file into an existing case, as follows:

- On the *Dashboard* page, select one of the following methods to access the *Search for Case* page:

- Click . On the *Start Filing* page that is displayed, click .
- Click .

When the *Search for Case* page is displayed, enter the search criteria for the case that you want to file into. Then, click .



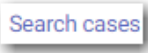
- On the *Filing History* page, locate the case that you want to file into, and then click . Next, select **File into case** from the actions menu.

## Filing into an Existing Case from the Dashboard Page

You can file into an existing case from the *Dashboard* page by using any one of several methods.

To file into an existing case from the *Dashboard* page:

1. From the *Dashboard* page, select one of the following methods to begin:

- Click . On the *Start Filing* page that is displayed, click .
- Click .

The *Search for Case* page is displayed.

**Search for Case**

If you are not sure your case number is correct, refer to the formatting instructions for the selected court or search for the case by party name.

Location \*  
Select...

Search for Case by

Case Number  Party Name

If you are not sure your case number is correct, refer to the formatting instructions for the selected court.

Case Number \*

Sort results by  
Newest to Oldest

Cancel Search

Figure 13.1 – Example of a Search for Case Page

**Note:** Your system may be configured to search only by case number. With this optional configuration, the Party Name option is not displayed.

2. Type the search criteria in the window, and then click



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

The case that matches your search criteria is displayed.



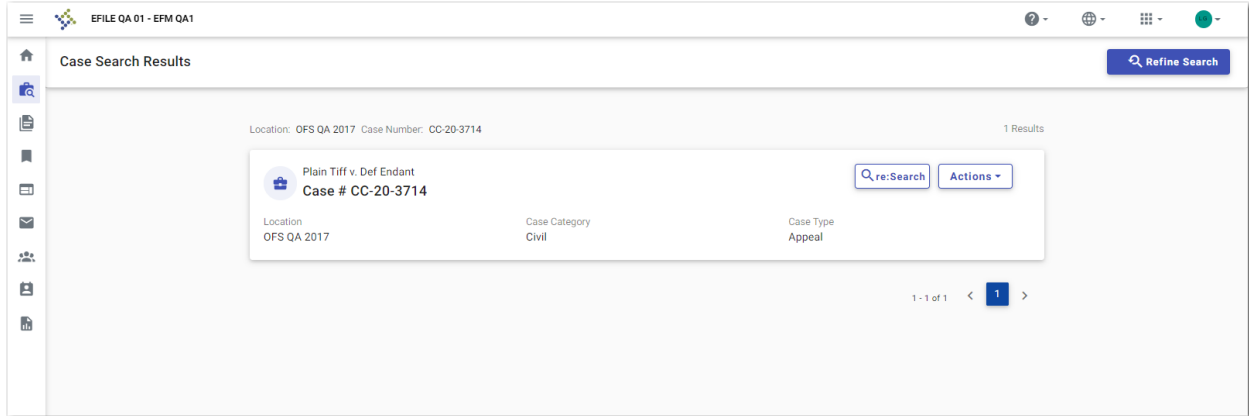


Figure 13.2 – Example of a Case Search Results Page

3. Click . Next, select **File into case** from the actions menu.

The *File Into Case* page is displayed. The case information for the specified case is populated.

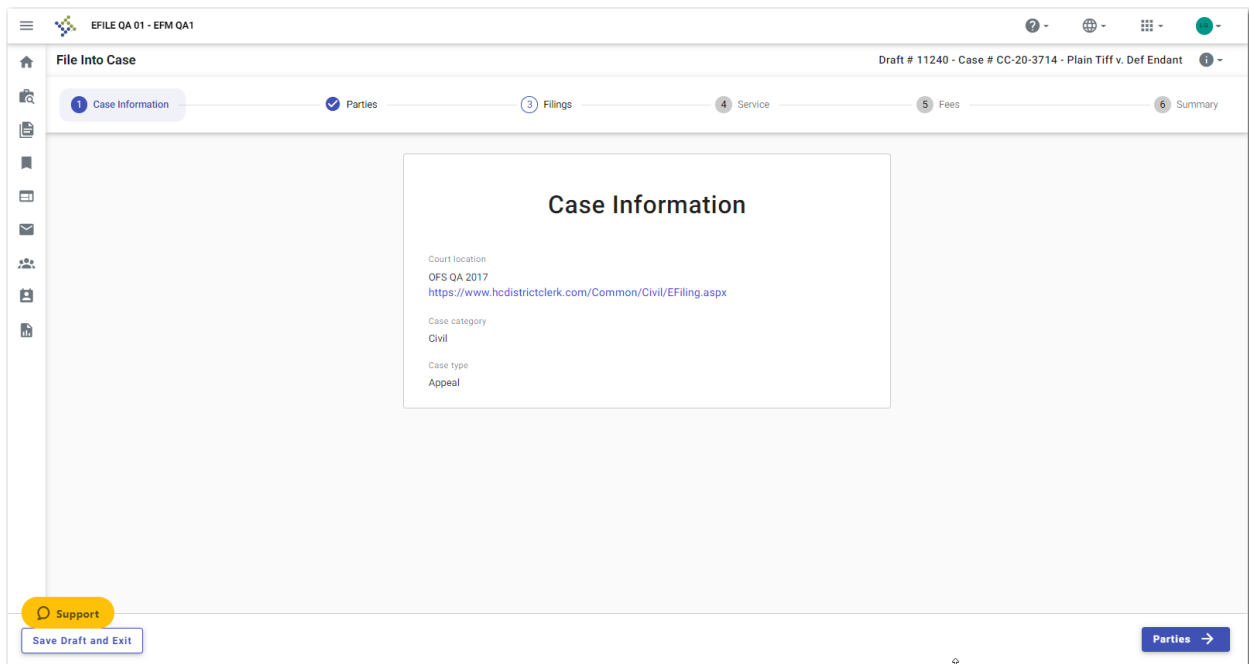
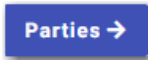


Figure 13.3 – Example of a File Into Case Page with Case Information Displayed


4. Verify the information on the *File Into Case* page. Make any changes, if applicable. Then, click



The *Parties* page is displayed.

5. Add additional parties to the case if you want.

**Note:** The ability to add a new party to an existing case is configured by Tyler. If your system is configured with this capability,  is displayed on the *Parties* page.

6. Click .

The *Filings* page is displayed.

7. On the *Filings* page, click .

The *Edit Filing Details* page is displayed.

8. In the Filing Type pane, select the filing type option.

9. Select the filing type from the **Filing Type** drop-down list.


10. In the Filing Information pane, select the filing code from the **Filing Code** drop-down list.

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

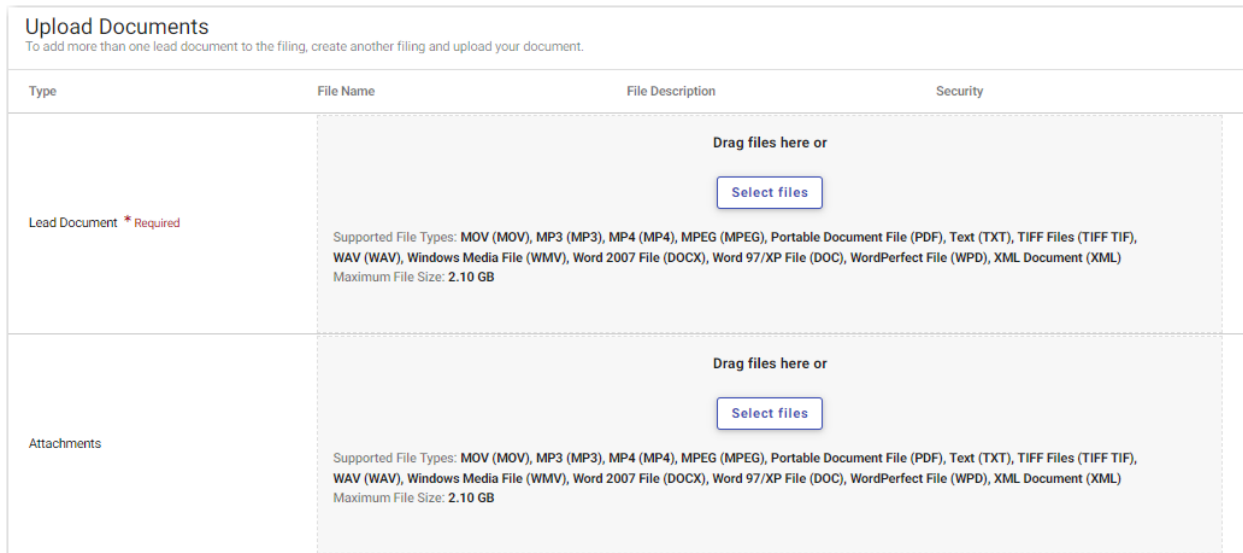
12. Type a description in the **Filing Description** field.

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

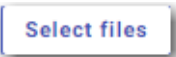
14. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.

15. In the Upload Documents pane, click . Then, select the document that you want to upload.

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



**Figure 13.4 – Upload Documents Pane**

16. If you have attachments to add to the filing, click  in the **Attachments** section. Then, upload the specified attachments.

17. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
18. To add additional services, click **Additional Services**.

The **Additional Services** pane is displayed.

19. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

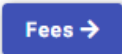
20. Click  , or click **Communications** at the top of the page.

The **Communications** pane is displayed.

21. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

22. Click  .

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

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

25. On the *Fees* page, select the payment account from the **Payment Account** drop-down list, or follow the steps to create a new payment account.

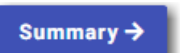
26. Select the filing attorney from the **Filing Attorney** drop-down list.

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


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

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

29. Click  if you want to view the fee total.

30. Click  .

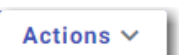
31. Review the summary. If applicable, select the **Submission Agreements** check box.

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

## Filing into an Existing Case from the Filing History Page

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

To file into an existing case from the *Filing History* page:

1. On the *Filing History* page, click  .

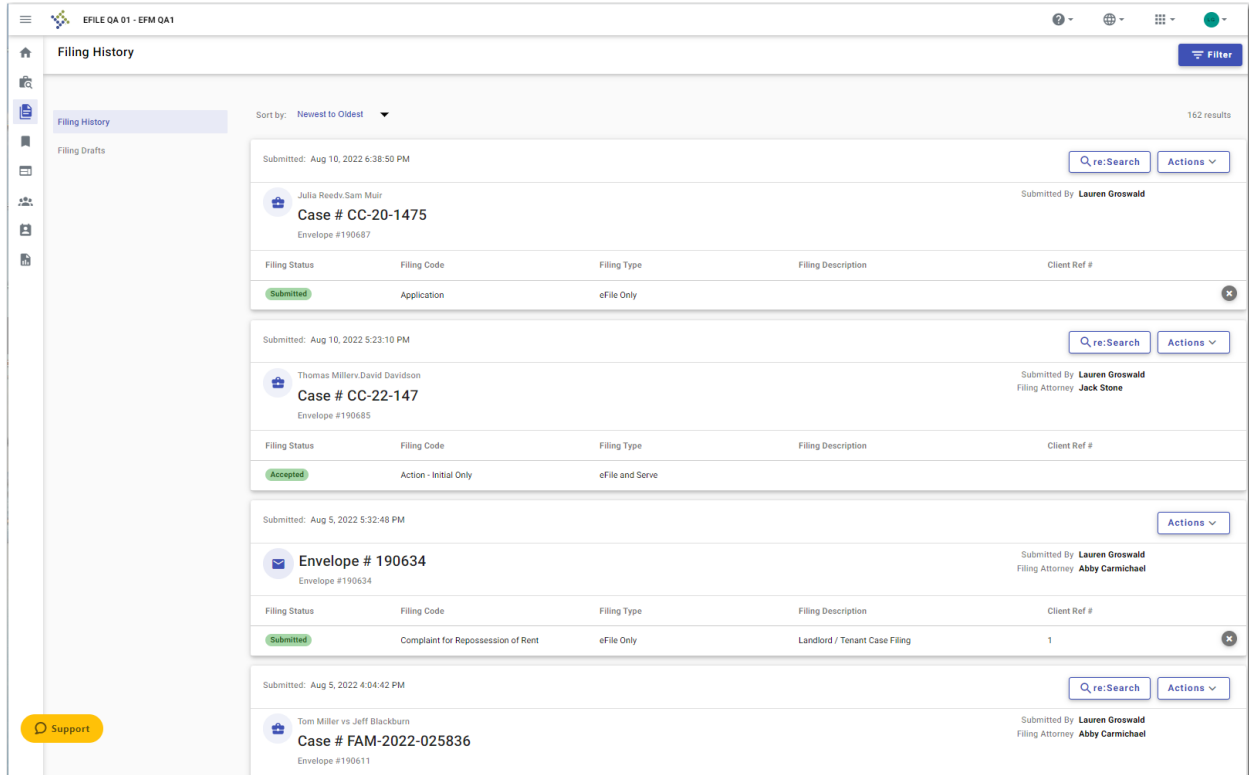


Figure 13.5 – Example of a Filing History Page

- From the actions menu, select **File into case**.

The *File Into Case* page is displayed. The case information for the specified case is populated.


- Click .

The *Parties* page is displayed.

- Verify the party information. You can add another party to the filing if you want.

- Click  to continue with your filing.

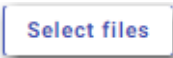
The *Filings* page is displayed.

- On the *Filings* page, click .

The *Edit Filing Details* page is displayed.

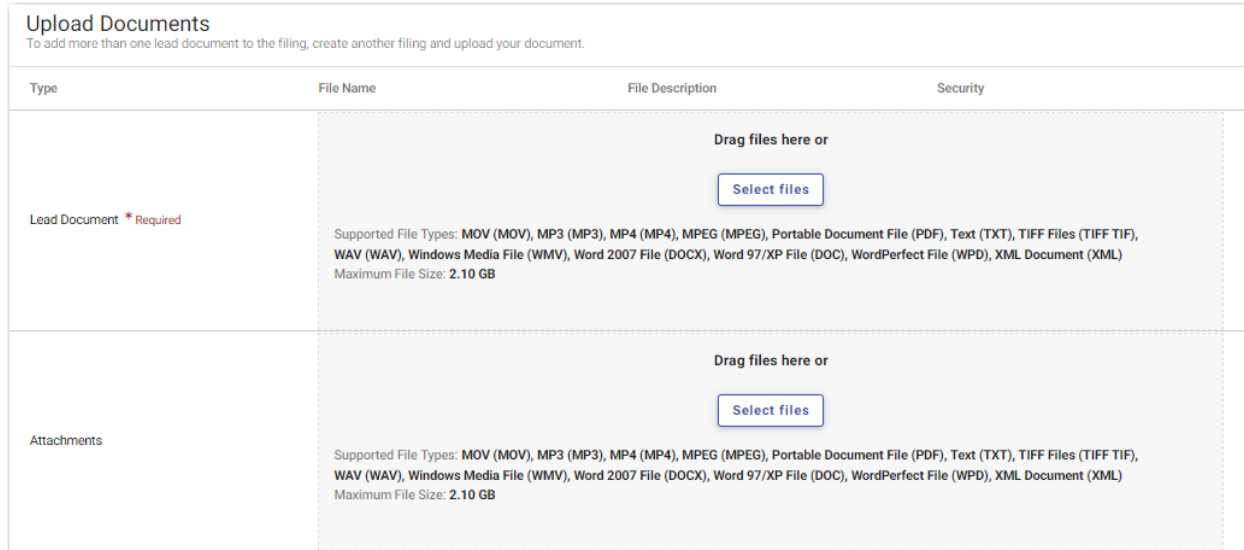
- In the Filing Type pane, select the filing type option.
- Select the filing type from the **Filing Type** drop-down list.
- In the Filing Information pane, select the filing code from the **Filing Code** drop-down list.
- Type a client reference number in the **Client Reference Number** field.
- Type a description in the **Filing Description** field.
- If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.

13. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.



14. In the Upload Documents pane, click . Then, select the document that you want to upload.

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



**Figure 13.6 – Upload Documents Pane**

15. If you have attachments to add to the filing, click  in the **Attachments** section. Then, upload the specified attachments.

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

17. To add additional services, click **Additional Services**.

The Additional Services pane is displayed.

18. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.



19. Click , or click **Communications** at the top of the page.


The Communications pane is displayed.

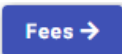
20. Type a valid email address to specify the recipient of the courtesy or preliminary copies.



21. Click .



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



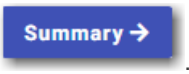
23. On the *Service* page, add service contacts, if applicable. Then, click .

24. On the *Fees* page, select the payment account from the **Payment Account** drop-down list, or follow the steps to create a new payment account.
25. Select the filing attorney from the **Filing Attorney** drop-down list.
26. Select the party responsible for fees from the **Party Responsible for Fees** drop-down list.


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

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

28. Click  if you want to view the fee total.

29. Click .

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

31. When you are satisfied with your filing, click .

## Filing into a Non-Indexed Case

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

To file into a non-indexed case:

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

The *Search for Case* page is displayed.

**Search for Case**

If you are not sure your case number is correct, refer to the formatting instructions for the selected court or search for the case by party name.

Location\*  
Select...

Search for Case by

Case Number  Party Name

If you are not sure your case number is correct, refer to the formatting instructions for the selected court.

Case Number\*

Sort results by  
Newest to Oldest

Cancel Search

**Figure 13.7 – Example of a Search for Case Page**

**Note:** Your system may be configured to search only by case number. With this optional configuration, the Party Name option is not displayed.

2. Select the location from the **Location** drop-down list.

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

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

4. Click  .

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

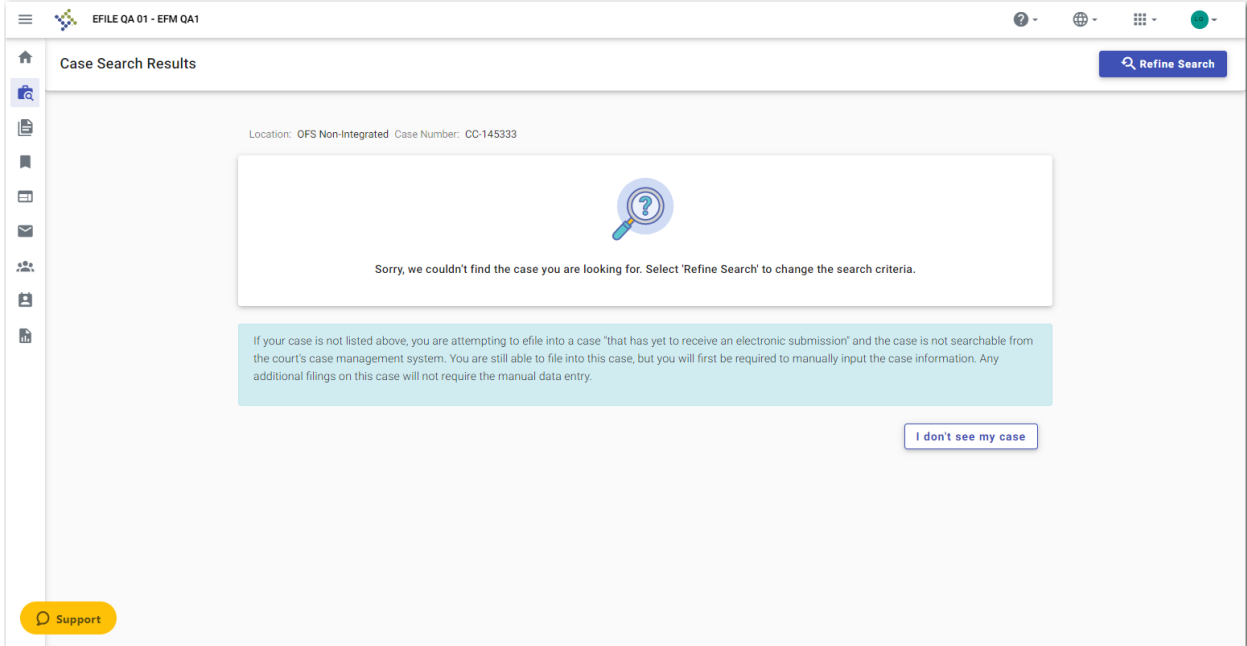


Figure 13.8 – Example of a Case Search Window with No Results Found

- To continue, click .
- The *I Don't See My Case* window is displayed.

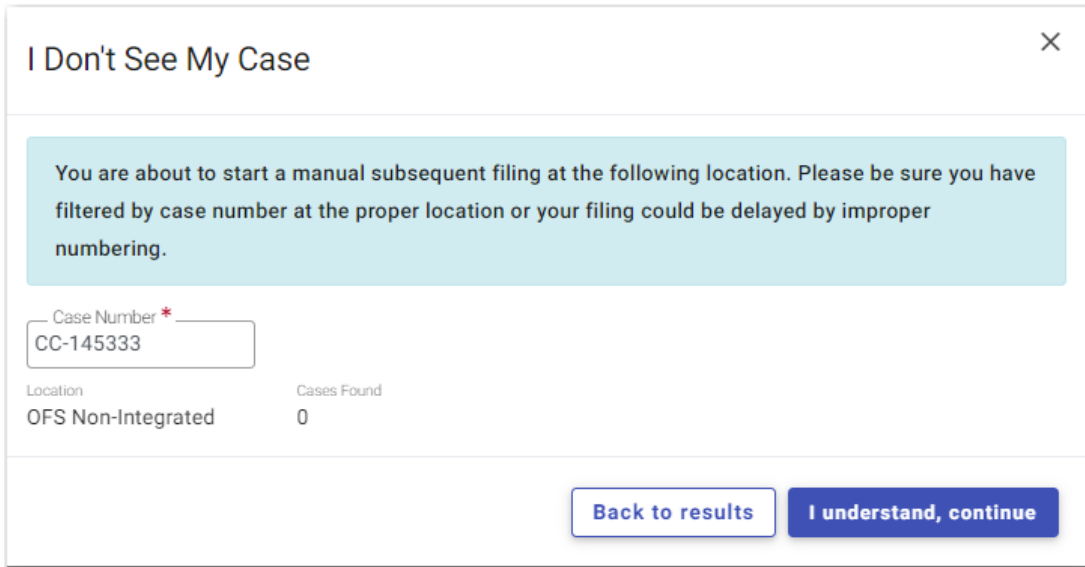
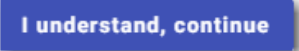


Figure 13.9 – Example of an I Don't See My Case Window

- Click  to continue filing into the case.
- The *Case Information* page is displayed. The location and case number are populated on the page.

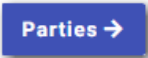



The screenshot shows a web browser window with the title 'EFILE QA 01 - EFM QA1'. The page is titled 'New Case Filing' and shows a progress bar with six steps: 1. Case Information, 2. Parties, 3. Filings, 4. Service, 5. Fees, and 6. Summary. The 'Case Information' form is the main focus, containing the following fields:

- Case Number**: Text input field containing 'CC-145333'.
- Court location**: Dropdown menu showing 'OFS Non-Integrated'.
- Case category**: Dropdown menu showing 'Select...'.
- Case type**: Dropdown menu showing 'Select...'.

Below the form, there are buttons for 'Support', 'Save Draft and Exit', and 'Parties →'.

Figure 13.10 – Example of a Case Information Page

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

## Creating a Service Only Filing

To create a Service Only filing:

1. Select an existing case that you want to file into.
2. Follow one of the methods for filing into an existing case (that is, from the *Filing History* page, from the *Search for Case* page, or from the *Dashboard* page).

**Note:** The *Case Information* page and the *Parties* page are already populated since this is an existing case.

3. On the *Filings* page, click . The *Edit Filing Details* page is displayed.

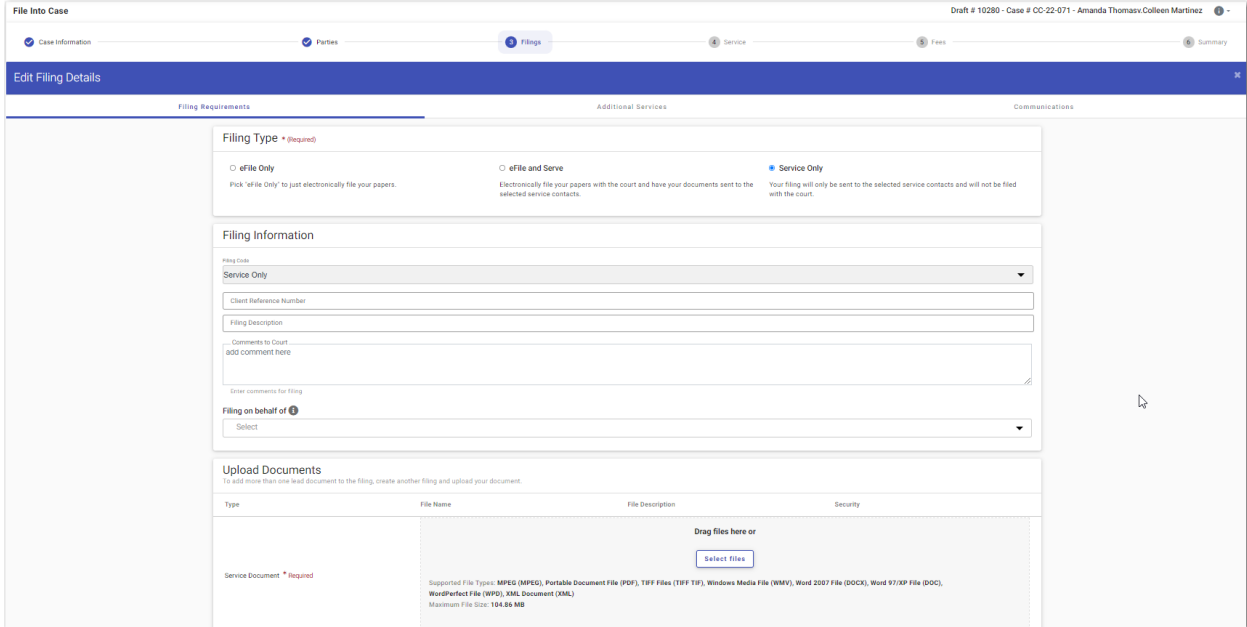


Figure 13.11 – Example of the Edit Filing Details Page—Service Only Filing

4. In the Filing Type pane, select **Service Only**.
5. In the Filing Information pane, enter information, if applicable.


**Note:** The **Service Only** filing code is selected by default.


6. In the Upload Documents pane, click . Then, select the document that you want to upload.

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


Type	File Name	File Description	Security
Lead Document * Required	<p>Drag files here or</p> <p>Select files</p> <p>Supported File Types: MOV (MOV), MP3 (MP3), MP4 (MP4), MPEG (MPEG), Portable Document File (PDF), Text (TXT), TIFF Files (TIFF TIF), WAV (WAV), Windows Media File (WMV), Word 2007 File (DOCX), Word 97/XP File (DOC), WordPerfect File (WPD), XML Document (XML) Maximum File Size: 2.10 GB</p>		
Attachments	<p>Drag files here or</p> <p>Select files</p> <p>Supported File Types: MOV (MOV), MP3 (MP3), MP4 (MP4), MPEG (MPEG), Portable Document File (PDF), Text (TXT), TIFF Files (TIFF TIF), WAV (WAV), Windows Media File (WMV), Word 2007 File (DOCX), Word 97/XP File (DOC), WordPerfect File (WPD), XML Document (XML) Maximum File Size: 2.10 GB</p>		

Figure 13.12 – Upload Documents Pane

- If you have attachments to add to the filing, click  in the **Attachments** section. Then, upload the specified attachments.
- If you want to add security to any of the documents, select an option from the **Security** drop-down list.

9. Click  to save your entries and to continue.

10. On the *Service* page, add the service contacts that you want to receive a Service Only filing.

11. Click  to save your entries and to continue.

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

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

14. Review the information on the *Summary* page, and then click .

# 14 Access re:Search®

While you are working in File & Serve, you can access re:Search® from several locations in the application.

**Note: The ability to access re:Search from File & Serve is configured by Tyler and may not be available on your system. You also must have an existing account in re:Search to access it from File & Serve.**

When a case is available in re:Search, it is indicated by a button that is displayed on the case card. Click



to access a specified case in re:Search. re:Search opens in a new tab in your browser, and the specified case details are displayed. You can view past and future hearing dates for the case if it is available in re:Search.

You can access re:Search from the following locations in File & Serve:

- *Filing History* page

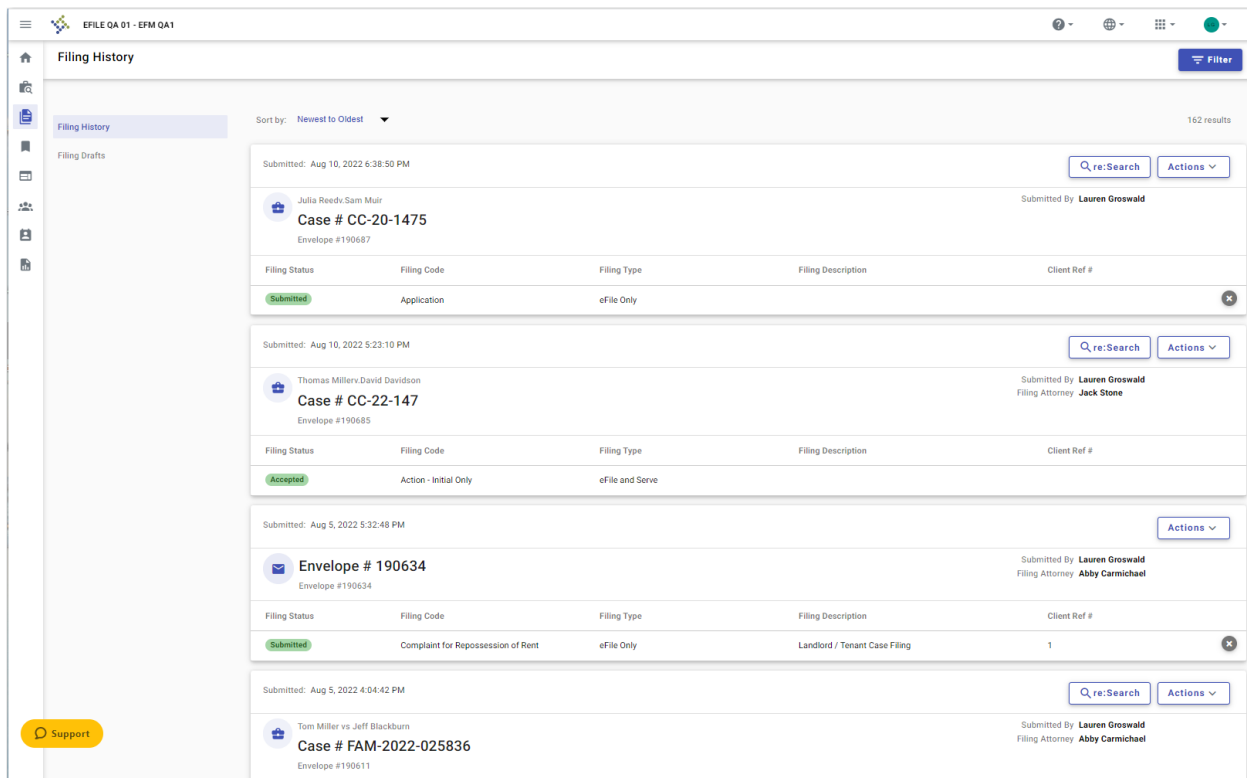


Figure 14.1 – re:Search Button on the Filing History Page

- *Filing Drafts* page

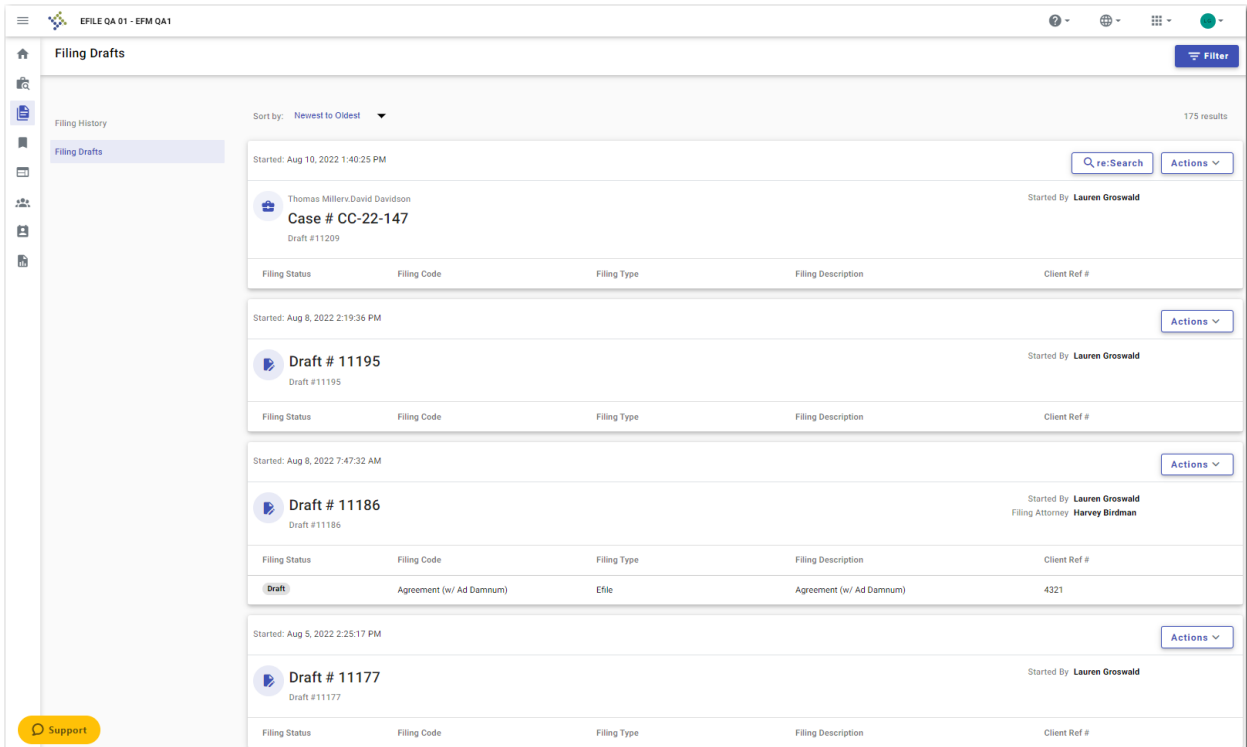


Figure 14.2 – re:Search Button on the Filing Drafts Page

- *Case Search Results* page

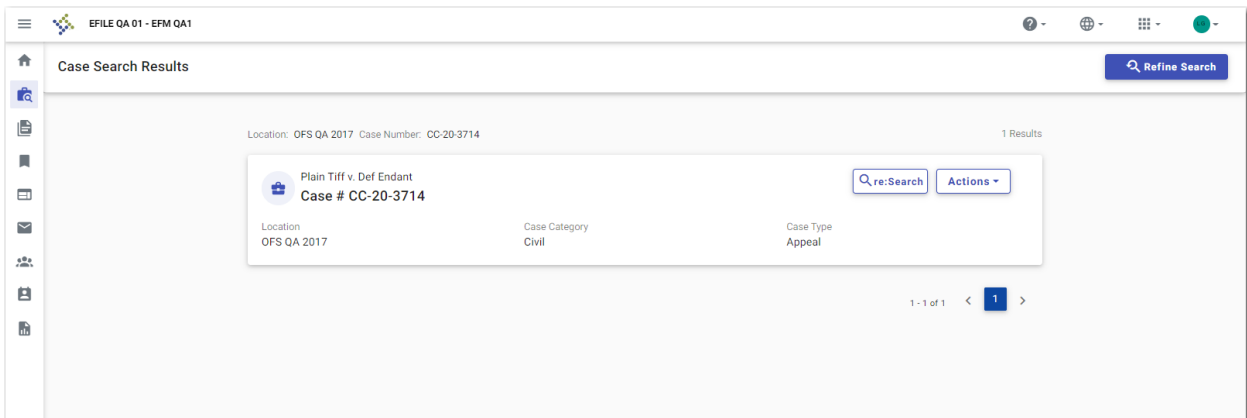


Figure 14.3 – re:Search Button on the Case Search Results Page

- *Bookmarks* page

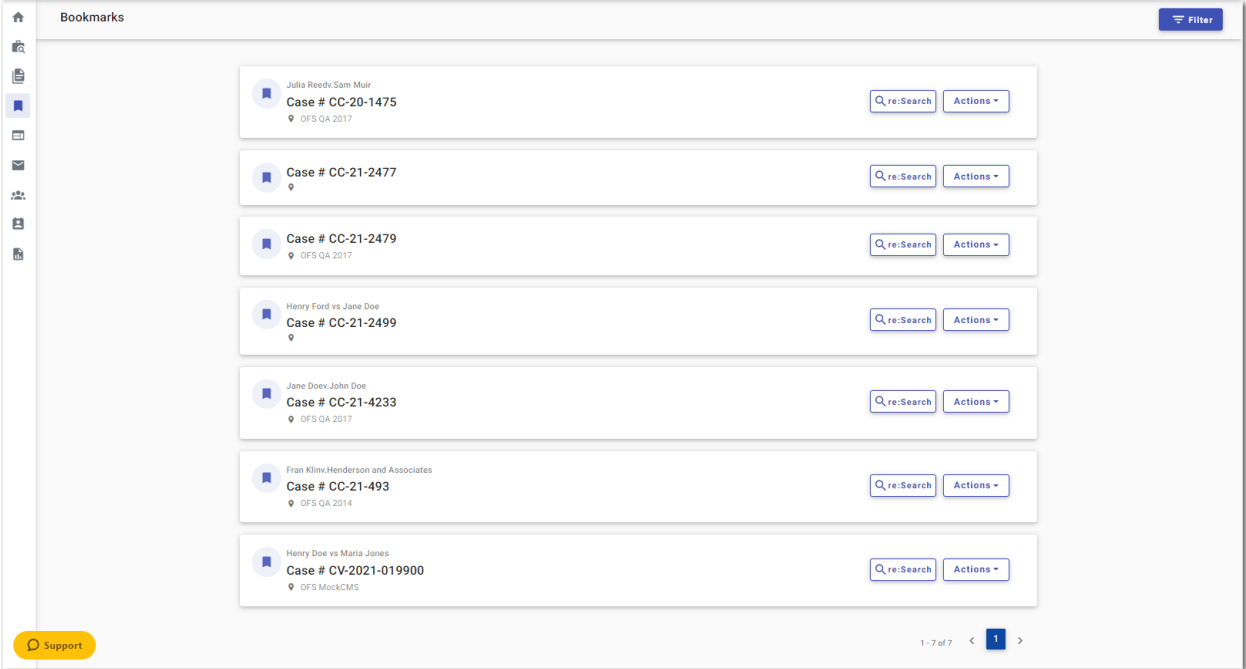


Figure 14.4 – re:Search Button on the Bookmarks Page

# 15 Service Contacts

## Topics covered in this chapter

- ◆ Adding a New Service Contact
- ◆ Adding Yourself as a Service Contact to a Filing
- ◆ Adding a Service Contact from Your Firm's Service Contact List to a Filing
- ◆ Adding a Service Contact from a Public List to a Filing
- ◆ Adding a New Service Contact to a Filing
- ◆ Updating Information for an Existing Service Contact
- ◆ Viewing a List of Cases Attached to a Service Contact
- ◆ Viewing Service Contact History for a Case
- ◆ Updating Information for a Service Contact Attached to a Case
- ◆ Deleting a Service Contact

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

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

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

You can view the service contact history for a case from any of the following locations:

- *Filing History* page (click  to open the actions menu)

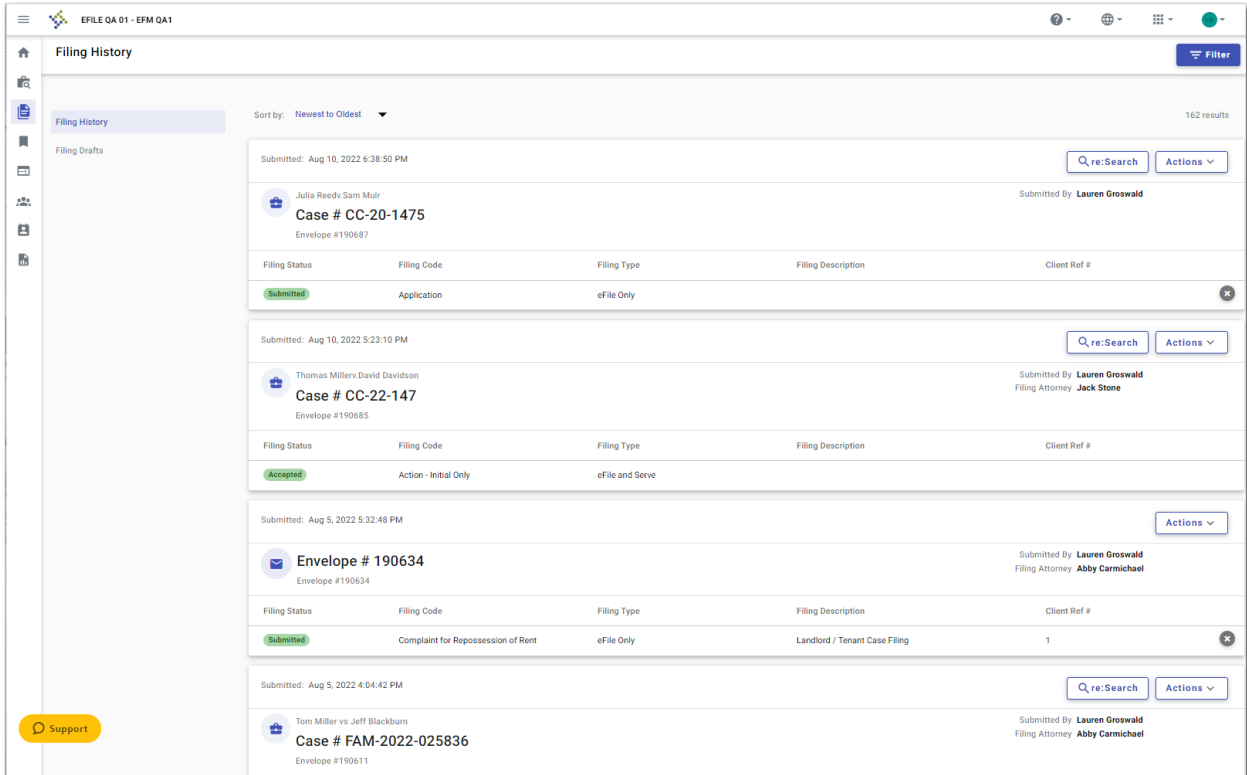


Figure 15.1 – Example of a Filing History Page

- Case Search Results page (click  to open the actions menu)

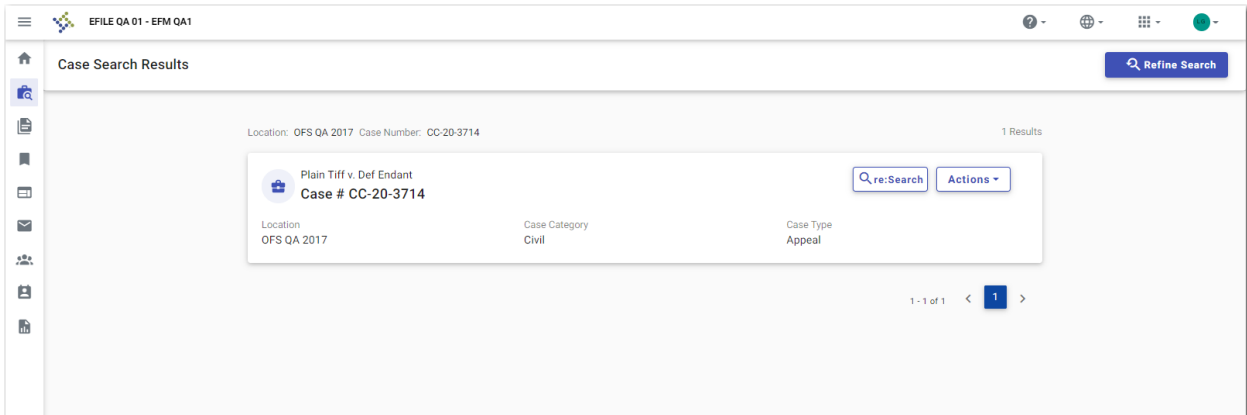
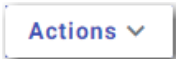


Figure 15.2 – Example of a Case Search Results Page

- Bookmarks page (click  to open the actions menu)



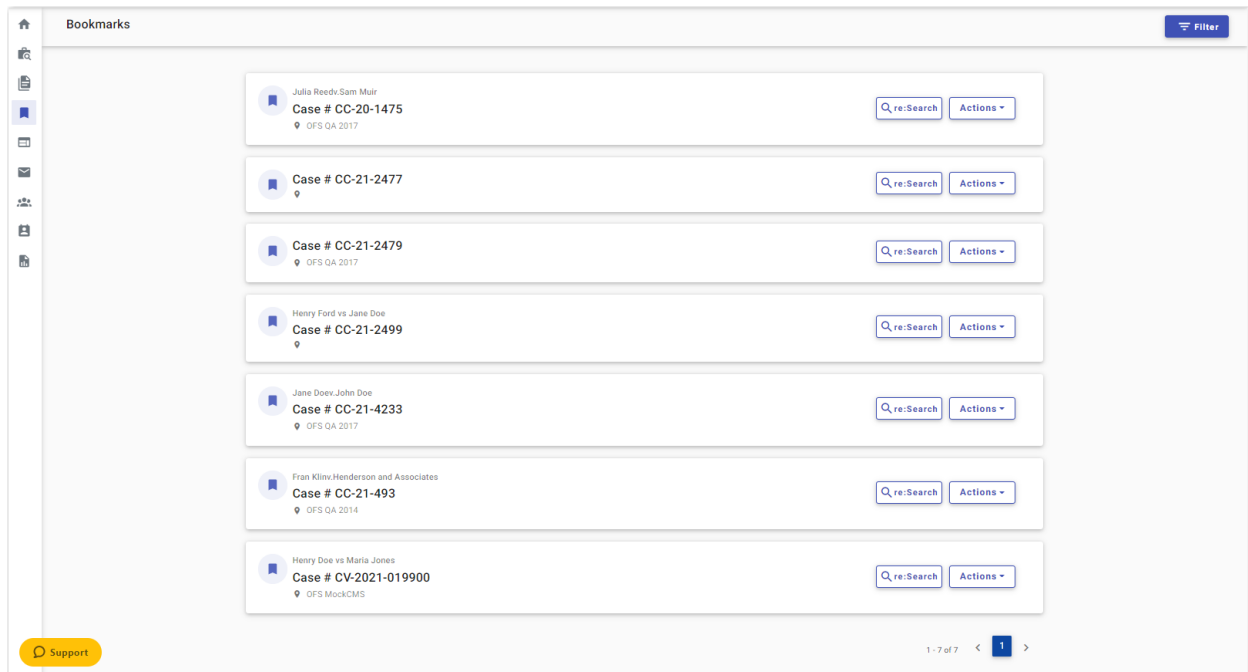


Figure 15.3 – Example of a Bookmarks Page

## Adding a New Service Contact

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

To add a new service contact to your firm's contacts list:

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

The *Firm Service Contacts* page is displayed.

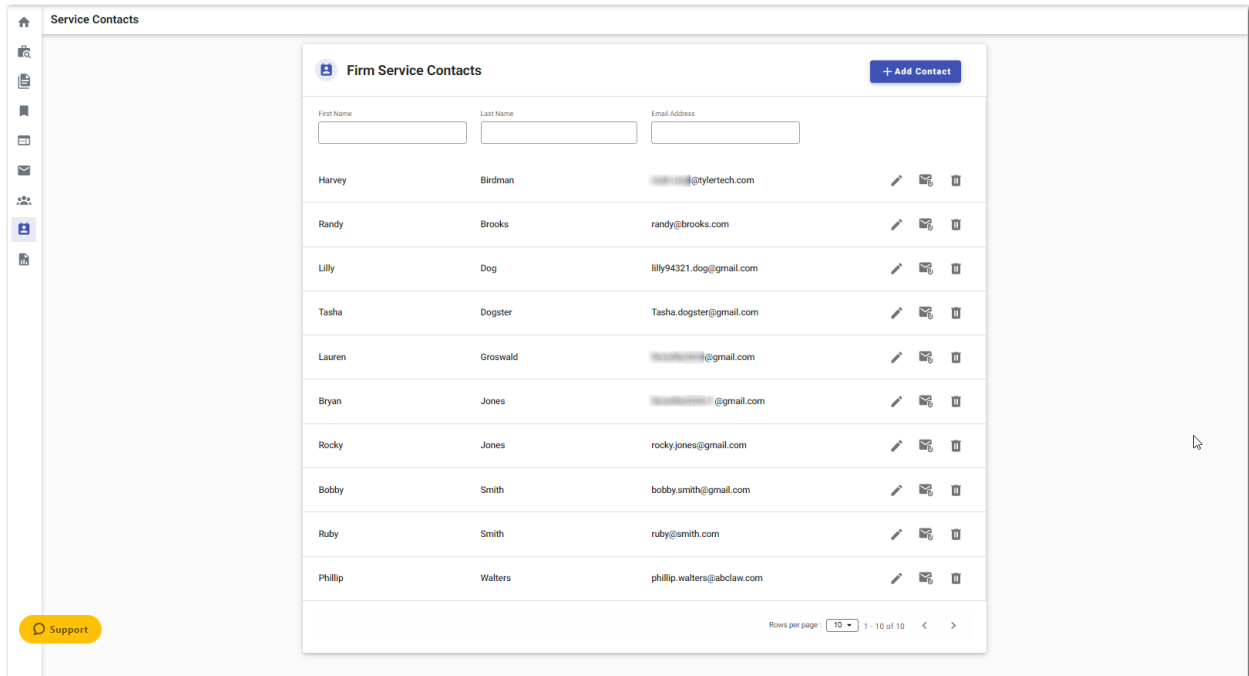



Figure 15.4 – Example of a Firm Service Contacts Page

2. Click  .

The *Add Service Contact* window is displayed.

**Figure 15.5 – Add Service Contact Window**

3. Complete the required information in the **First Name** and **Last Name** fields. Add a middle name, if applicable, in the **Middle Name** field.
4. Type the contact's email address in the **Email** field.

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

5. If applicable, type a phone number in the **Phone Number** field.
6. If applicable, type the administrative email address in the **Administrative email(s)** field.
7. If the contact is in a country other than the United States, select the country from the drop-down list.

The default selection is **United States**.

8. If a physical address is required for the service contact, type the address in the **Address Line 1** field.
9. If applicable, type an address in the **Address Line 2** field.
10. Type the name of the city in the **City** field.
11. Select the state from the **State** drop-down list.
12. Type the ZIP code in the **Zip Code** field.
13. Select the **Add to Public List** check box if you want to add the new service contact to the public list.

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

14. After you have entered the required information, click  .

The contact that you added is displayed in the list on the *Firm Service Contacts* page.

## Adding Yourself as a Service Contact to a Filing

You can add yourself as a service contact on a case filing to ensure that you will receive updates regarding the filing.

The screenshot shows a web interface for a 'New Case Filing'. At the top, there is a navigation bar with tabs for 'Case Information', 'Parties', 'Filings', 'Service' (selected), 'Fees', and 'Summary'. The 'Draft # 10234' is displayed in the top right. Below the navigation bar, the 'Service Contacts' section is visible. It contains three panels: 'Plaintiff Jane Doe', 'Defendant John Doe', and 'Other Service Contacts'. Each panel has an 'Email/Mail' field and an 'Actions' field. A '+ Add Me' button is highlighted in the top right corner of the Plaintiff panel. The text 'No service contacts added. Add a new or existing contact.' is displayed in the center of each panel.

Figure 15.6 – Example of a Service Page in a Case Filing

To add yourself as a service contact on a case filing:

1. On the *Service* page, click  .  
The *Add Me As Service Contact* page is displayed.

New Case Filing Draft # 10247 ⓘ

Case Information Parties Filings **4 Service** Fees Summary

Add Me As Service Contact

**Associate Parties**  
Select one or more parties to associate with the service contact

Select Parties

Figure 15.7 – Example of an Add Me As Service Contact Page

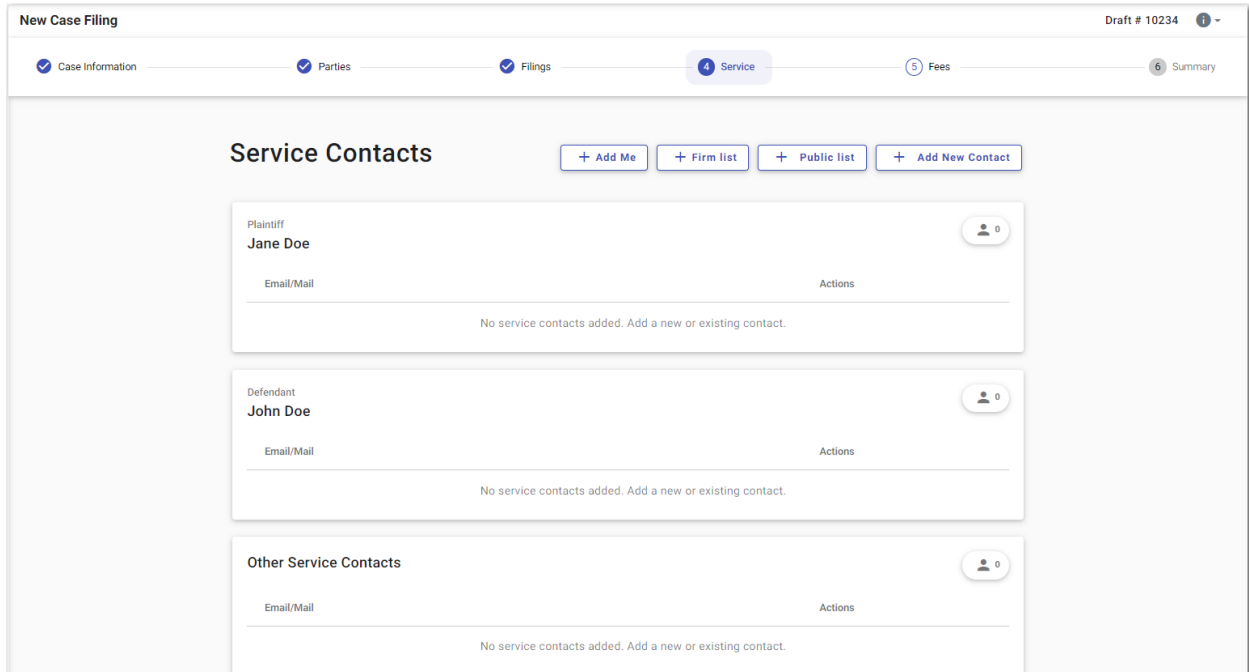
2. In the Associate Parties pane, select the party that you want to associate with the service contact.

**Note: If the service contact you are adding is not associated with any party on the case, select “Other: No party association” from the Associate Parties drop-down list.**

3. Click  .

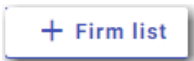
# Adding a Service Contact from Your Firm’s Service Contact List to a Filing

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



**Figure 15.8 – Example of a Service Page in a Case Filing**

To add a service contact from your firm’s service contact list to a filing:



1. On the *Service* page, click .

The *Add Existing Firm Contact* page is displayed.

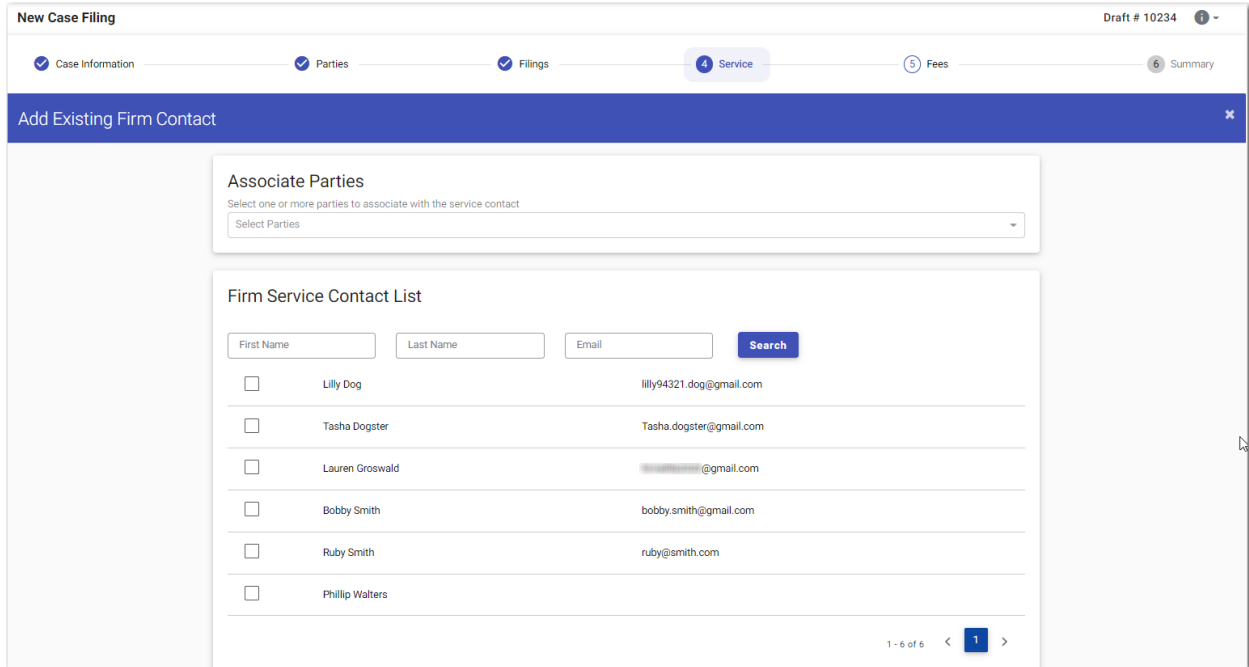


Figure 15.9 – Example of an Add Existing Firm Contact Page

2. In the Associate Parties pane, select the party that you want to associate with the selected service contacts.

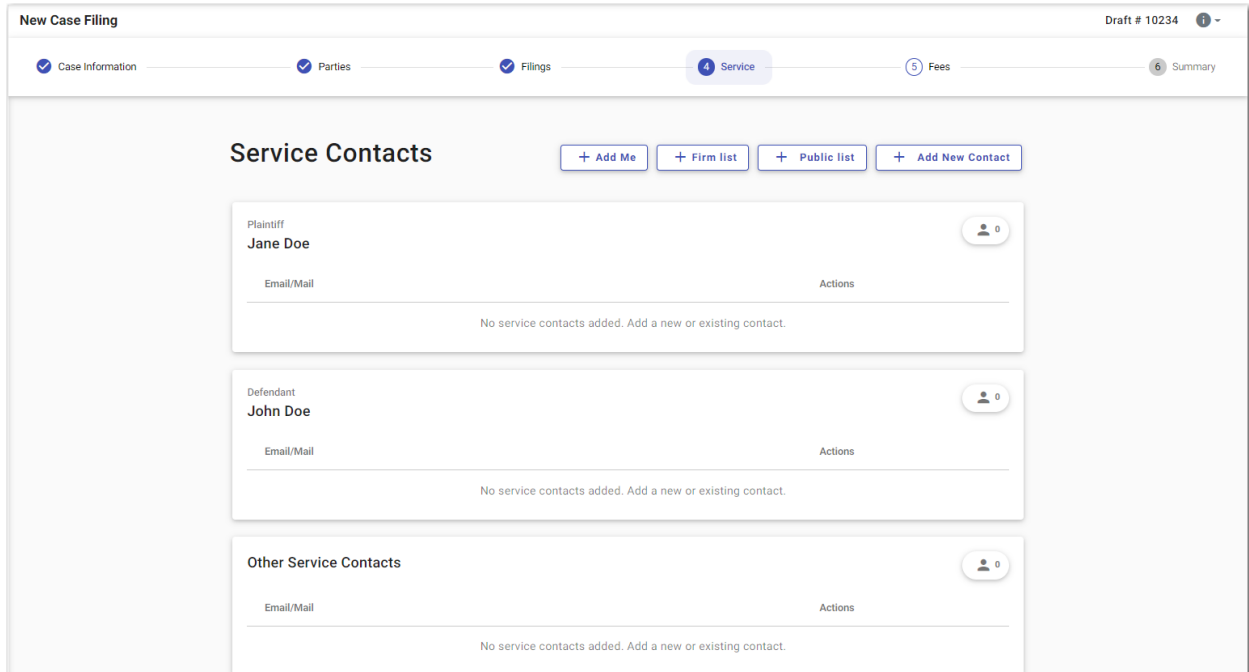
**Note:** If the service contact you are adding is not associated with any party on the case, select “Other: No party association” from the Associate Parties drop-down list.

3. In the Firm Service Contact List pane, select the check box for each contact that you want to add to the filing.

4. Click  .

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

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



**Figure 15.10 – Example of a Service Page in a Case Filing**

To add a service contact from a public list to a filing:



1. On the *Service* page, click .

The *Add Existing Public Contact* page is displayed.



**Figure 15.11 – Example of an Add Existing Public Contact Page**

- In the Associate Parties pane, select the party that you want to associate with the selected service contacts.

**Note:** If the service contact you are adding is not associated with any party on the case, select “Other: No party association” from the Associate Parties drop-down list.

- In the Public Service Contact List pane, type at least one letter in a field, and then click .

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

- Locate the contacts that you want to add to your filing.
- Select the check box for each contact that you want to add.

- Click .

## Adding a New Service Contact to a Filing

You can add a new service contact to a filing.

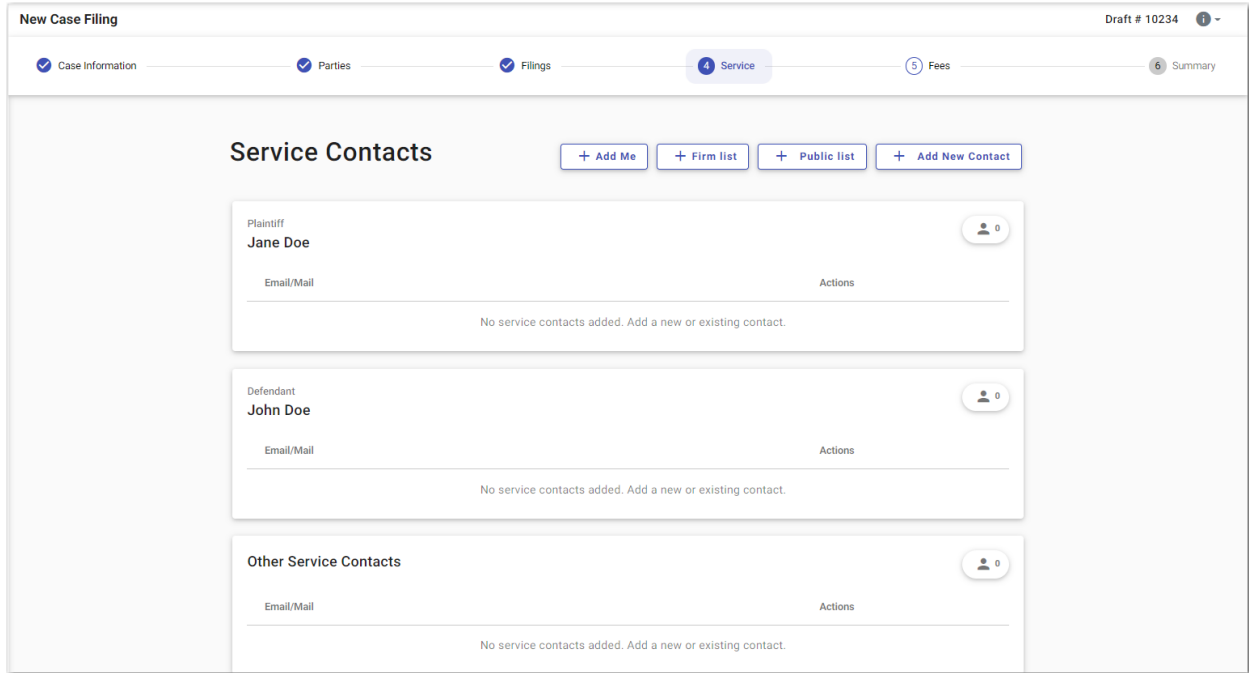


Figure 15.12 – Example of a Service Page in a Case Filing

To add a new service contact to a filing:

**+ Add New Contact**

1. On the *Service* page, click

The *Add Service Contact* page is displayed.

Figure 15.13 – Example of an Add Service Contact Page

- In the Service Method pane, from the **Service Method** drop-down list, select the service method to use for each service contact.

**Note:** If you selected the eFile Only option for the filing type, the Service Method pane is not displayed on the Add Service Contact page.

**Note:** The available service method options are configured by Tyler. Some options may not be available on your system.

Figure 15.14 – Example of a Service Method Drop-Down List

- In the Associate Parties pane, select the party that you want to associate with the new service contact.

**Note:** If the service contact you are adding is not associated with any party on the case, select “Other: No party association” from the Associate Parties drop-down list.

- In the Contact Information pane, complete the required information in the **First Name** and **Last Name** fields. Add a middle name, if applicable, in the **Middle Name** field.
- Type the contact’s email address in the **Email** field.

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

- If applicable, type a phone number in the **Phone Number** field.
- If applicable, type the administrative email address in the **Administrative email(s)** field.

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

The default selection is **United States**.

- If a physical address is required for the service contact, type the address in the **Address Line 1** field.
- If applicable, type an address in the **Address Line 2** field.
- Type the name of the city in the **City** field.
- Select the state from the **State** drop-down list.
- Type the ZIP code in the **Zip Code** field.
- Select the **Add to Public List** check box if you want to add the new service contact to the public list.

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



- After you have entered the required information, click .

## Updating Information for an Existing Service Contact

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

To update the information for an existing service contact:

- On the Dashboard menu, click **Service Contacts**.

The *Firm Service Contacts* page is displayed.

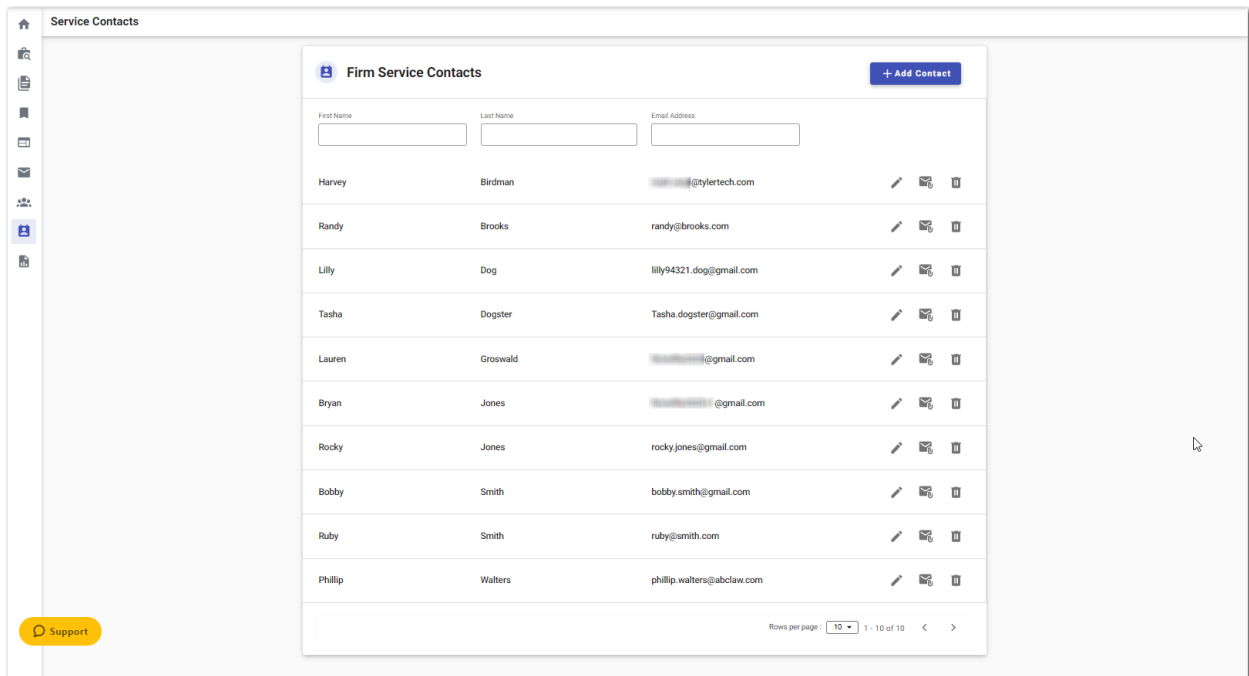



Figure 15.15 – Example of a Firm Service Contacts Page



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

The *Update Service Contact* window is displayed. The information that you previously entered for the specified service contact is populated in the window.

The screenshot shows a window titled "Update Service Contact" with a close button (X) in the top right corner. The form contains the following fields and values:

- First name \*: Ruby
- Middle name: (empty)
- Last name \*: Smith
- Email: ruby@smith.com
- Phone number: (empty)
- Administrative email(s): ruby@smithadmin.com
- Country: United States (dropdown menu)
- Address Line 1 \*: 555 Elm St.
- Address Line 2: (empty)
- City \*: Dallas
- State \*: Texas (dropdown menu)
- Zip Code \*: 75030
- Add to Public List

At the bottom right of the form are two buttons: "Cancel" and "Save".

**Figure 15.16 – Example of an Update Service Contact Window**

3. Update the information, as applicable.

4. When you are done with your updates, click

**Save**

## Viewing a List of Cases Attached to a Service Contact

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

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

To view a list of cases that are attached to a service contact:

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

The *Firm Service Contacts* page is displayed.

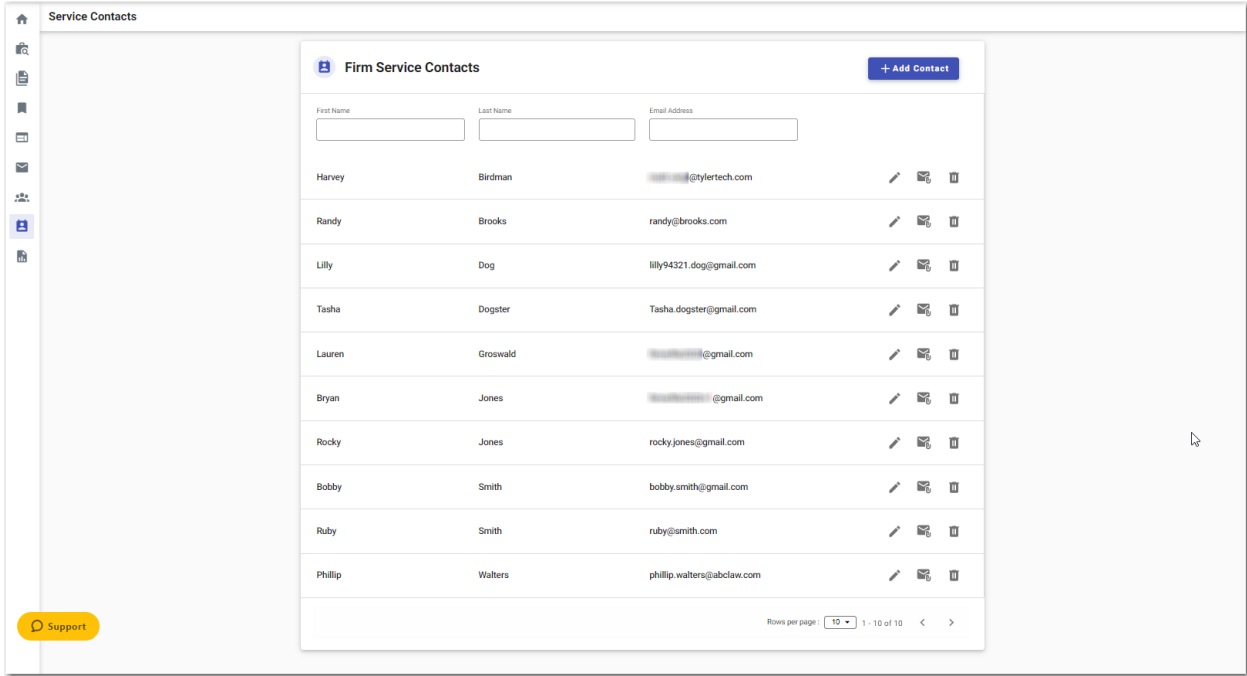
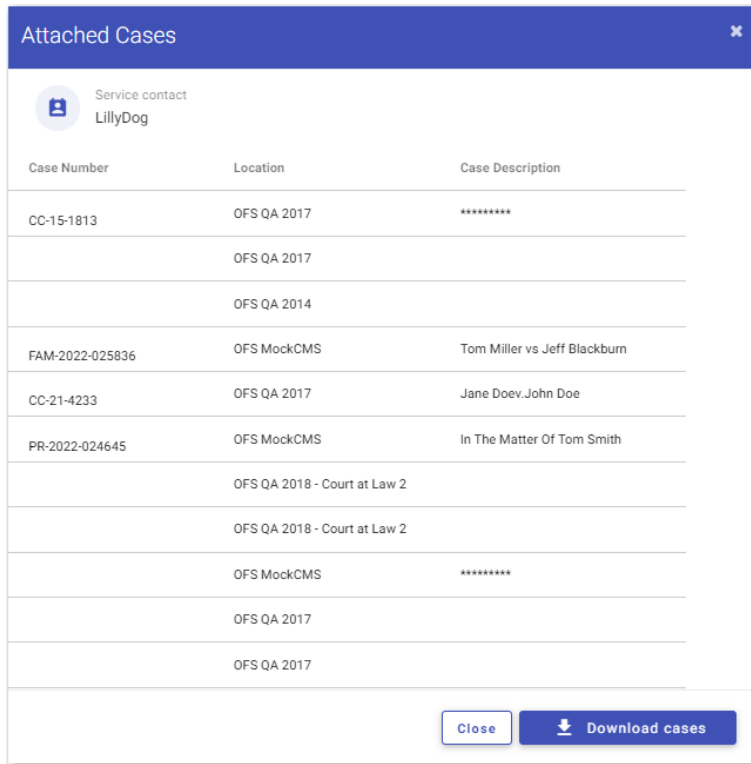


Figure 15.17 – Example of a Firm Service Contacts Page

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



If there are cases attached to the specified service contact, the list of cases is displayed in a window.



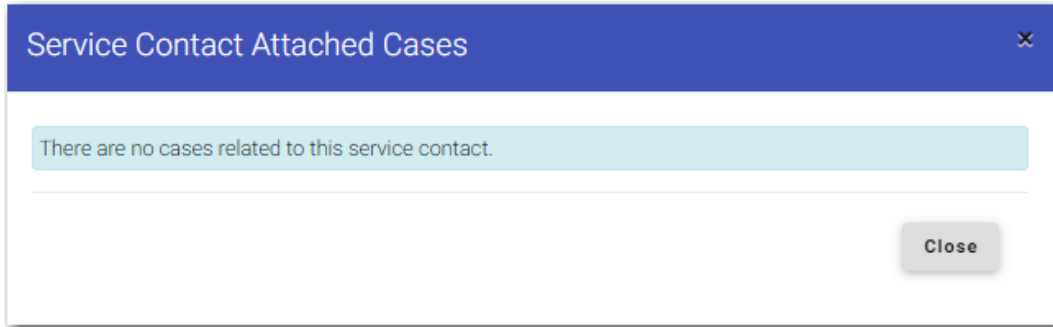
Case Number	Location	Case Description
CC-15-1813	OFS QA 2017	*****
	OFS QA 2017	
	OFS QA 2014	
FAM-2022-025836	OFS MockCMS	Tom Miller vs Jeff Blackburn
CC-21-4233	OFS QA 2017	Jane Doev, John Doe
PR-2022-024645	OFS MockCMS	In The Matter Of Tom Smith
	OFS QA 2018 - Court at Law 2	
	OFS QA 2018 - Court at Law 2	
	OFS MockCMS	*****
	OFS QA 2017	
	OFS QA 2017	

**Figure 15.18 – Example of an Attached Cases Window**

3. Click  to download the case list to a Microsoft Excel file.

The attached cases are listed on the Excel spreadsheet.

**Note:** If there are no cases attached to the service contact, the following window is displayed.



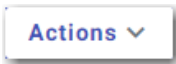
**Figure 15.19 – Service Contact Attached Cases Window—No Attached Cases**

## Viewing Service Contact History for a Case

You can view the service contact history for a case from the *Filing History* page, the *Case Search Results* page, or the *Bookmarks* page.

To view the service contact history for a case:

1. Locate the case for which you want to view the service contact history.

2. Click . Then, from the actions menu, click **View Service Contacts**.

The *Service Contacts* window for the specified case is displayed.



Service Contacts - Case # CC-22-689

### Service Contacts

+ Add Me + Firm list + Public list + Add New Contact

Defendant  
**Bob & Contractors** 0

Email/Mail Actions

No service contacts added. Add a new or existing contact.

Plaintiff  
**Allison Smart** 1

Email/Mail Actions

Tasha.dogster@gmail.com ✎ 🗑

Other Service Contacts 0

Email/Mail Actions

No service contacts added. Add a new or existing contact.

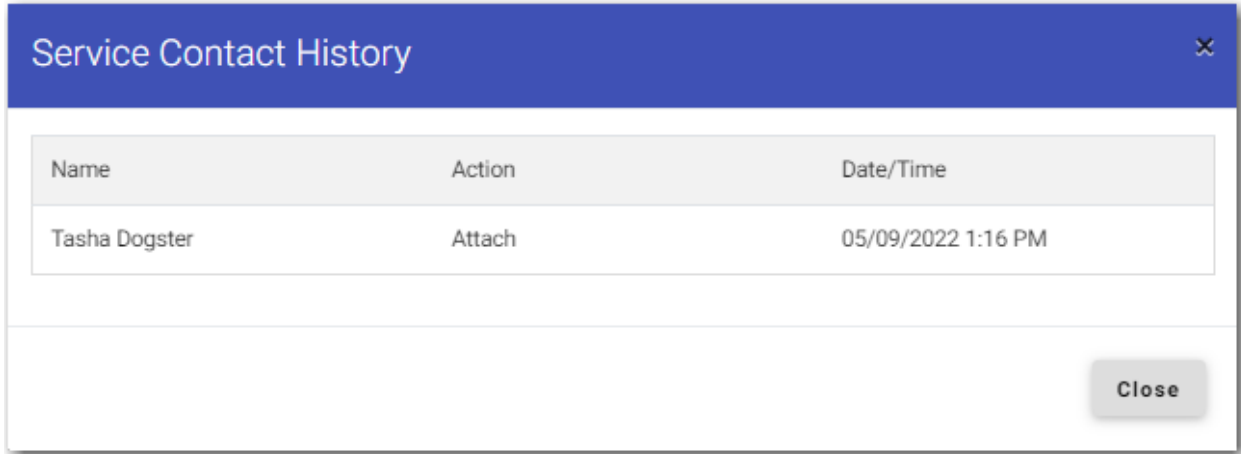
Service Contact History Cancel Save

Figure 15.20 – Example of a Case Service Contacts Window

3. Click

**Service Contact History**

The *Service Contact History* window is displayed.



Name	Action	Date/Time
Tasha Dogster	Attach	05/09/2022 1:16 PM

Figure 15.21 – Example of a Service Contact History Window

## Updating Information for a Service Contact Attached to a Case

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

To update the information for a service contact attached to a case:

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

The *Filing History* page is displayed.

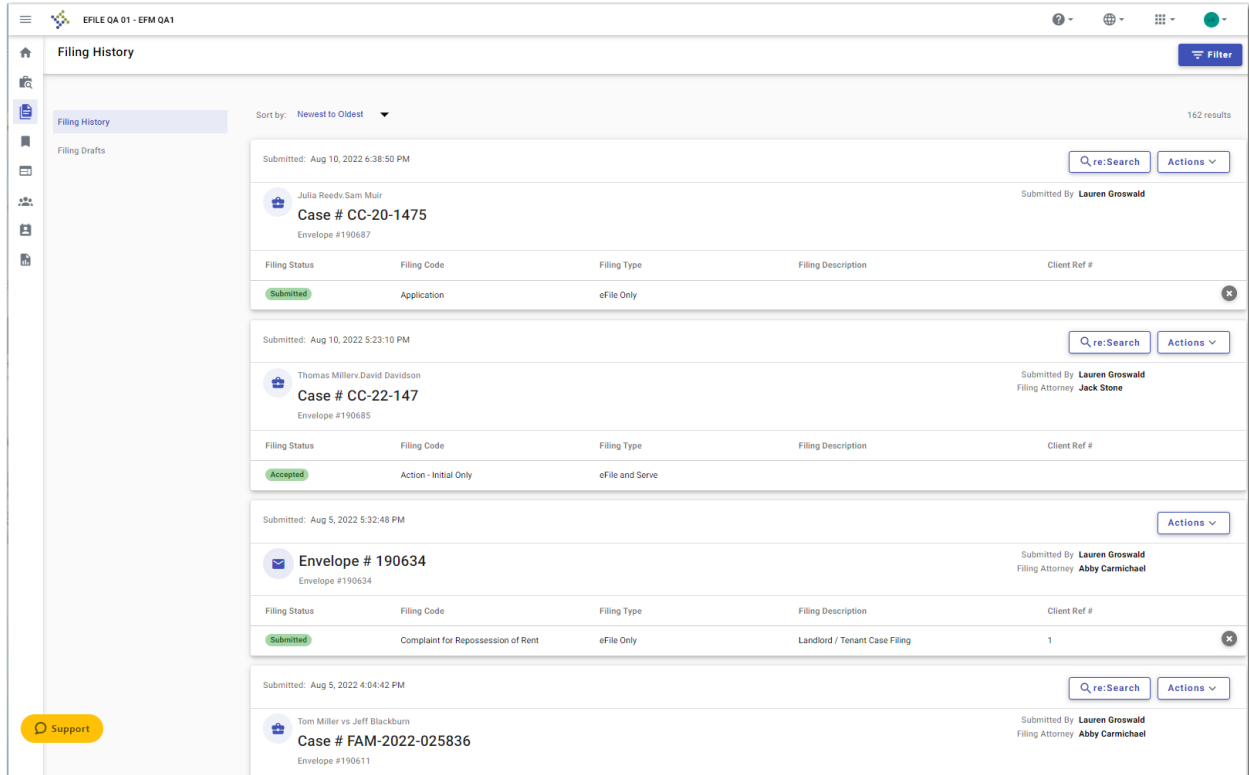


Figure 15.22 – Example of a Filing History Page

2. Locate the case for which you want to view the service contacts.

3. Click .

The actions menu for the specified case is displayed.

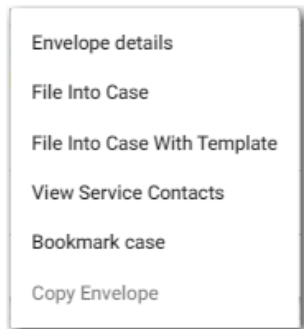


Figure 15.23 – Actions Menu

4. From the actions menu, click **View Service Contacts**.

The service contacts for the case are displayed.

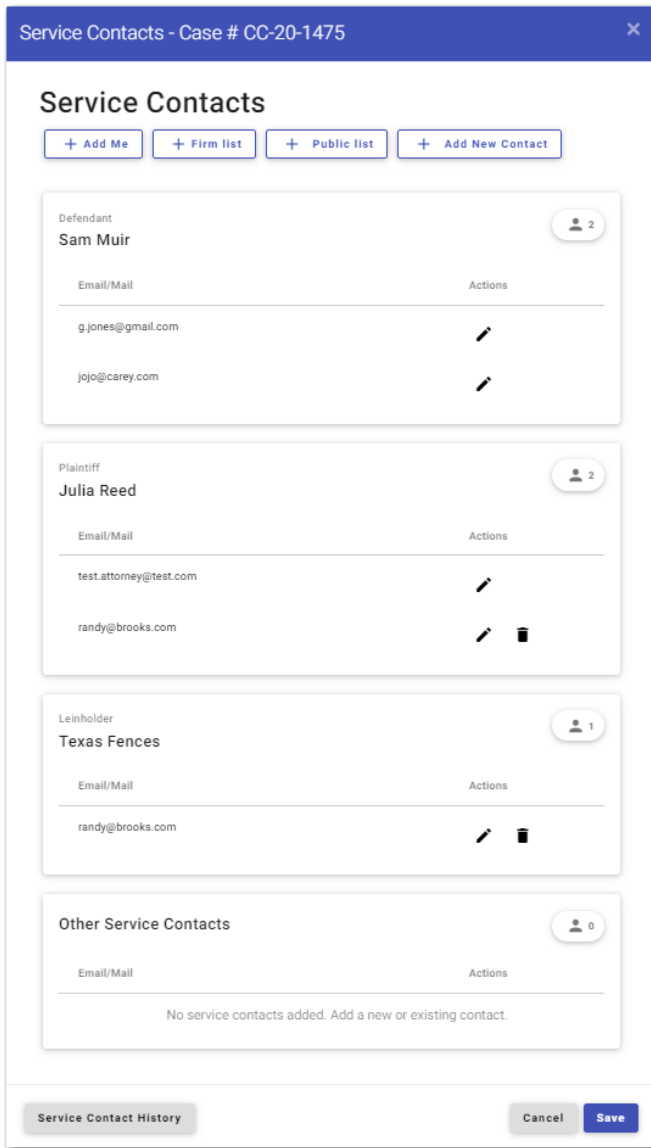


Figure 15.24 – Example of a Case Service Contacts Window


5. Locate the service contact that you want to update, and then click  .  
The *Update Service Contact* window is displayed.

Figure 15.25 – Example of an Update Service Contact Window

6. Update the information for the service contact, and then click

**Save**

7. Click

**Save**

to return to the *Filing History* page.

## Deleting a Service Contact

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

To delete a service contact from the *Service Contacts* page:

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

The *Firm Service Contacts* page is displayed.

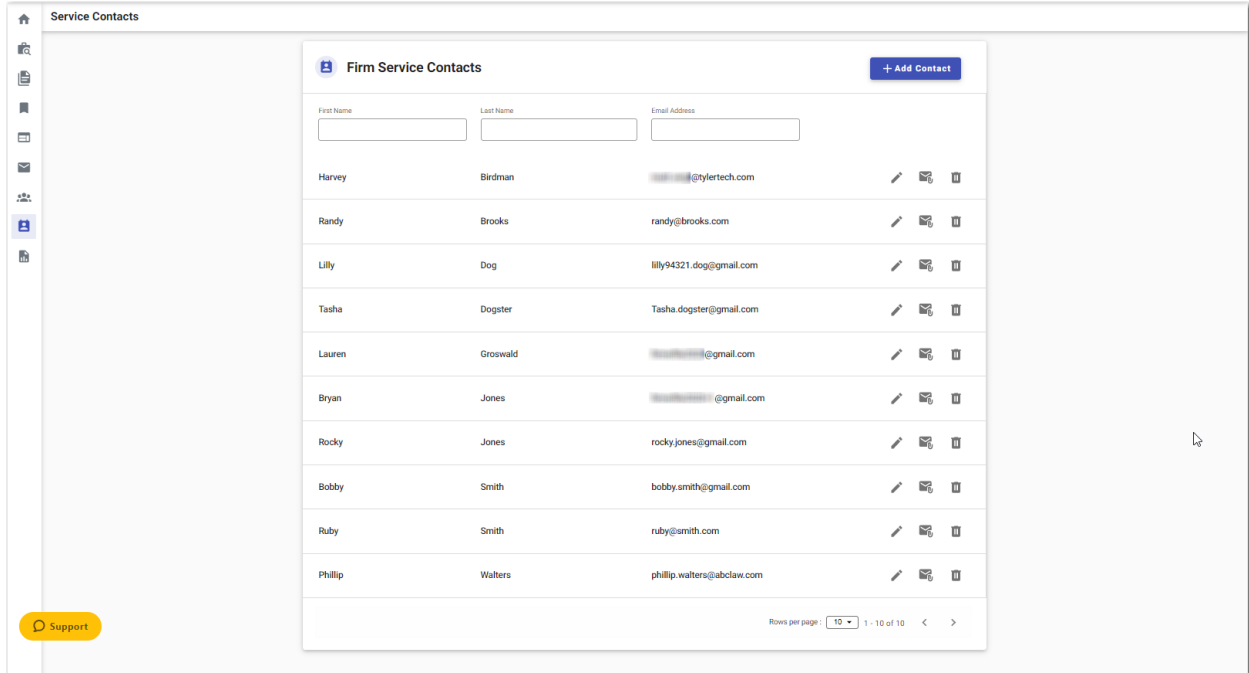




Figure 15.26 – Firm Service Contacts Page

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

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

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

# 16 Templates

## Topics covered in this chapter

- ◆ Adding a Template
- ◆ Editing a Template
- ◆ Using a New Case Template
- ◆ Using an Existing Case Template
- ◆ Copying a Template
- ◆ Deleting a Template

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

## Adding a Template

To add a template that you can use to quickly start a new case or file into an existing case:

1. On the Dashboard menu, click **Templates**.

The *Templates* page is displayed.

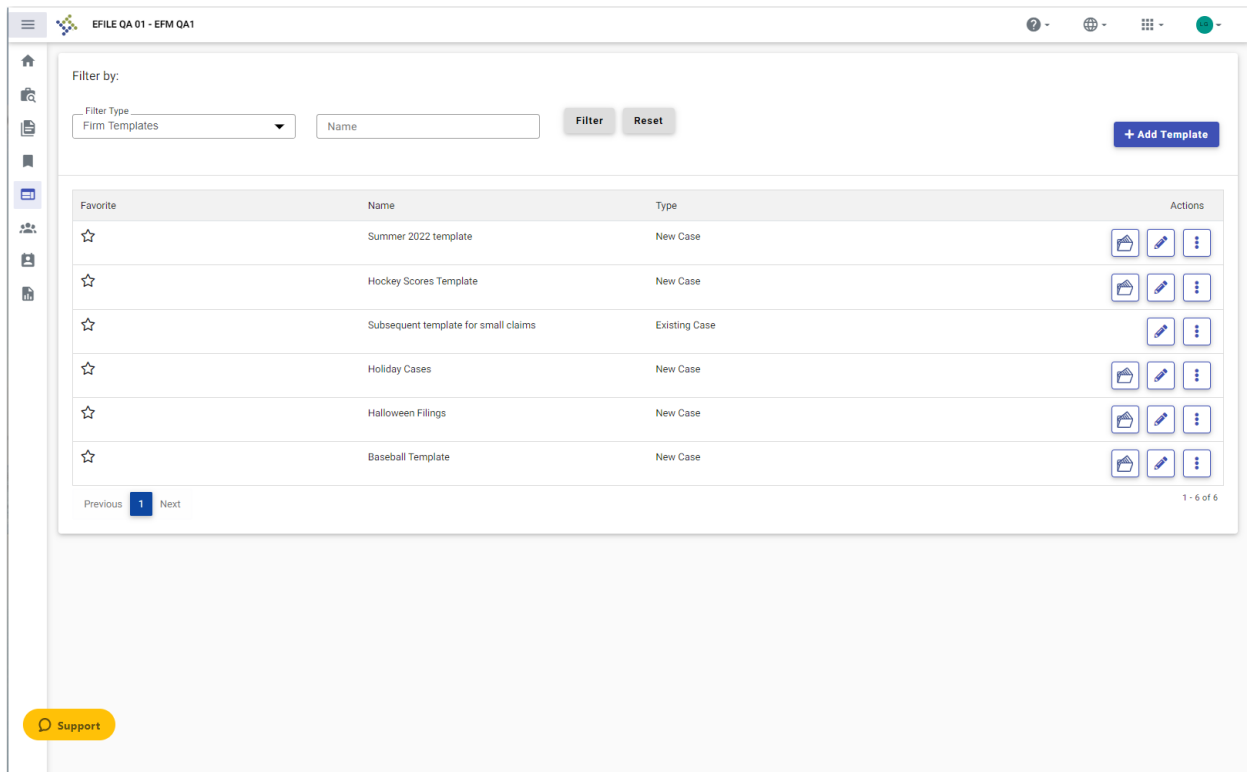



Figure 16.1 – Templates Page

2. Click

**+ Add Template**

A pane is displayed.

Figure 16.2 – Templates Pane

3. Type a name for the template in the **Name** field.
4. Select either **New Case** or **Existing Case**.
5. Select the **Favorite** check box if you want to designate this template as a favorite.
6. Click  to begin creating your template.

The *Case Information* page is displayed.

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

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

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



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

## Editing a Template

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

To edit an existing template:

1. On the Dashboard menu, click **Templates**.

The *Templates* page is displayed.



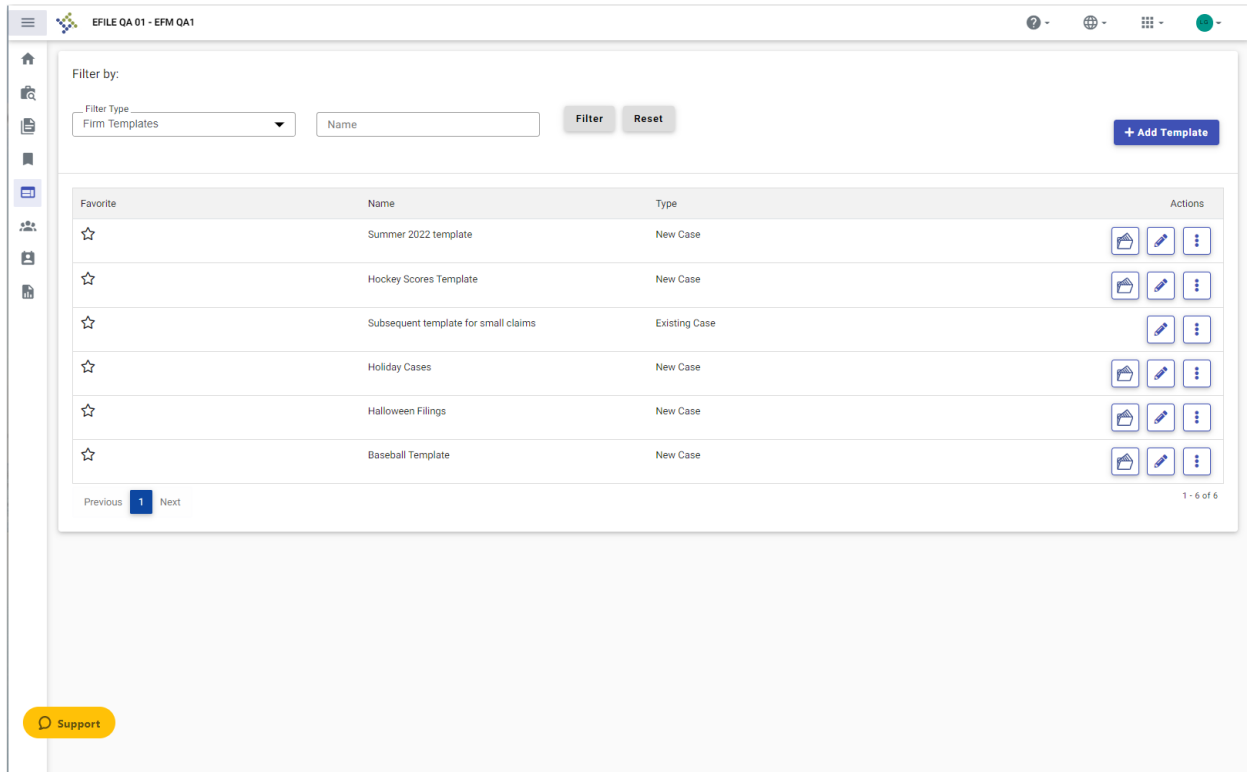



Figure 16.3 – Templates Page

2. Locate the template that you want to edit, and then click .

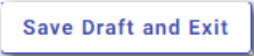
The template name is displayed in a separate pane.

**Note:** You can change the template name if you want.

3. Click .

The *Case Information* page is displayed. Any information that you previously entered on this page remains.

4. Make any changes that you want on the *Case Information* page.
5. If you entered information on any other pages in your template, make changes as needed to those

pages. Then click .

Your template is now updated and is listed on the *Templates* page and on the *Dashboard* page.

## Using a New Case Template

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

To use a template that you previously created:

1. On the Dashboard menu, click **Templates**.

The *Templates* page is displayed.

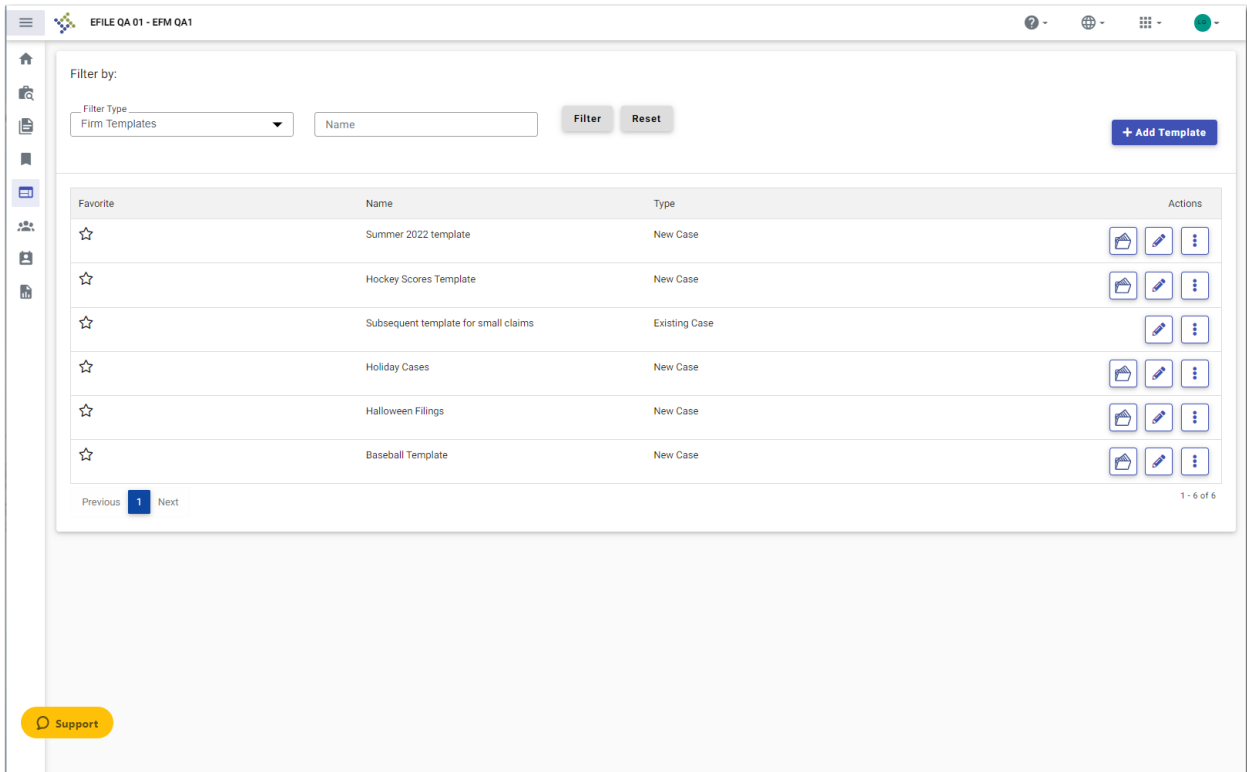


Figure 16.4 – Templates Page

2. Locate the template that you want to use, and then click .

The *Case Information* page is displayed. All of the information that you entered when you created the template is auto-filled.

3. Enter the remaining required information for the new case until you reach the *Summary* page.
4. Review the summary of the case filing. After you are satisfied with the information in your filing, click



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

## Using an Existing Case Template

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

To access an existing case template:

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

The *Filing History* page is displayed.

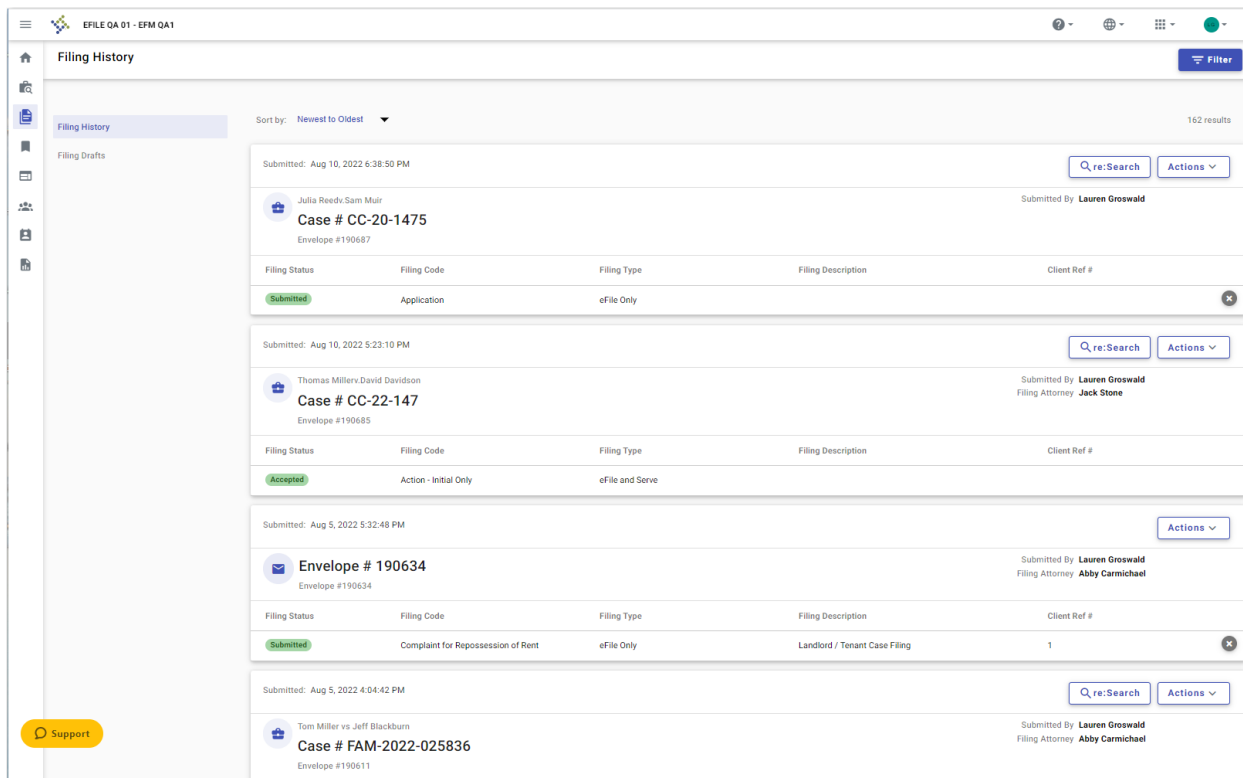



Figure 16.5 – Example of a Filing History Page

2. Locate the case that you want to file into, and then click .
3. From the actions menu, click **File Into Case With Template**.

The *Templates Matching* window is displayed, along with a list of available templates.

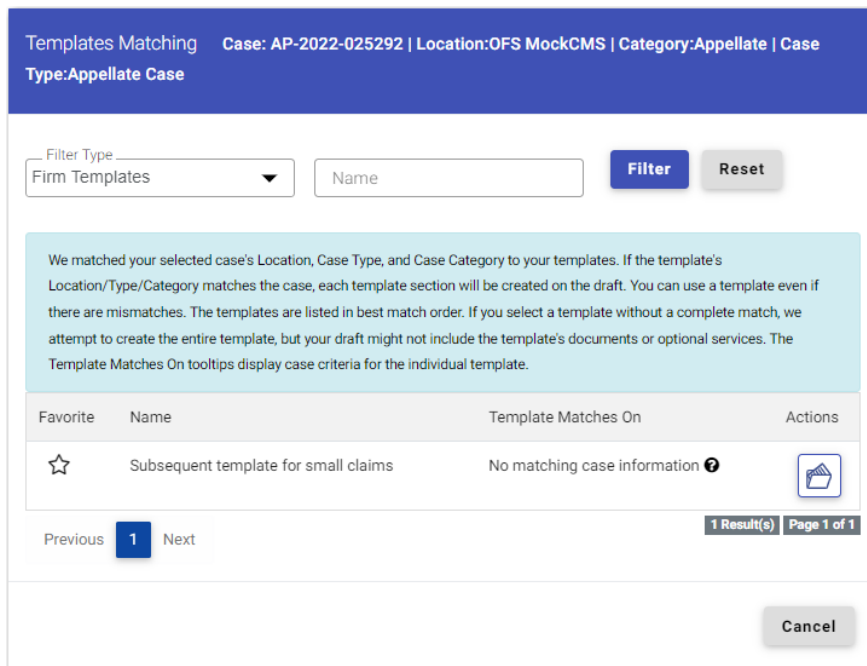



Figure 16.6 – Example of a Templates Matching Window

4. Locate the template that you want to use for the case you are filing into, and then click  .  
 The template that you selected is displayed on the *Case Information* page. The fields that you previously entered when the template was created are populated.
5. Enter the remaining required information for the new case until you reach the *Summary* page.
6. Review the summary of the case filing. After you are satisfied with the information in your filing, click



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

## Copying a Template

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

To copy an existing template:

1. On the Dashboard menu, click **Templates**.

The *Templates* page is displayed.

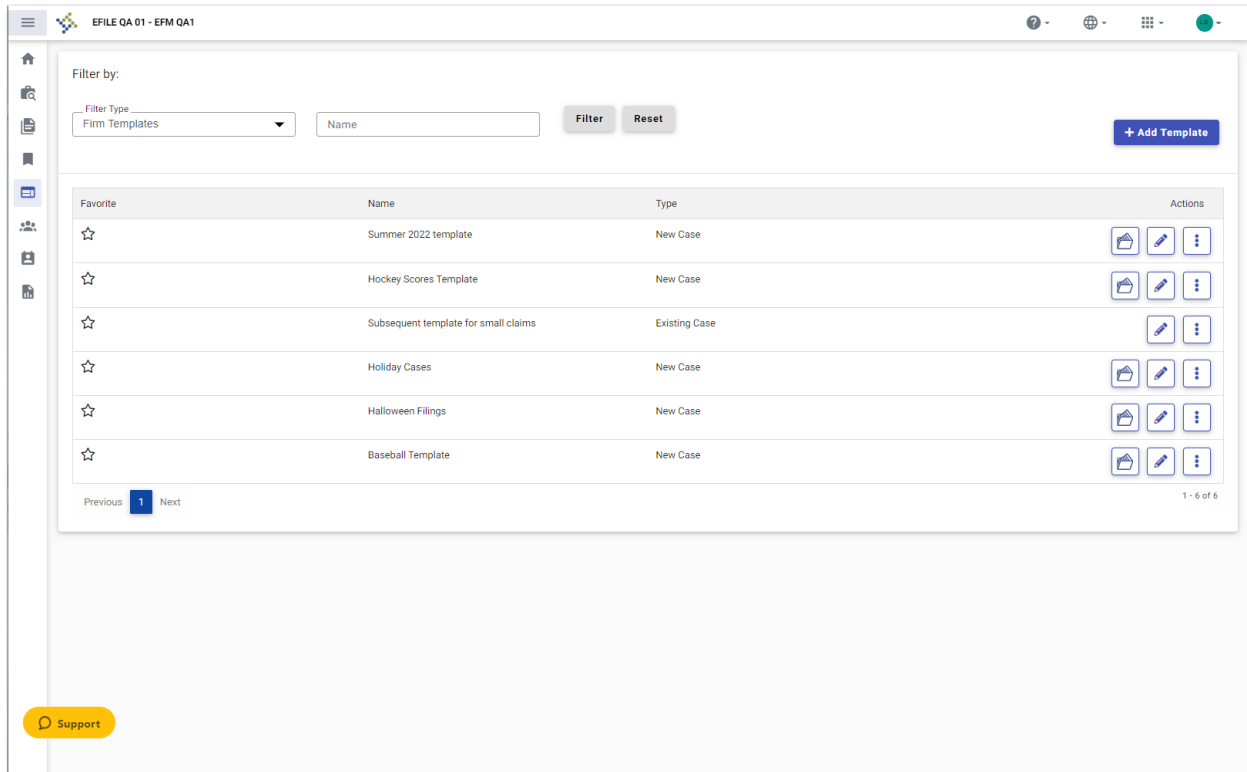



Figure 16.7 – Templates Page

- Locate the template that you want to copy, and then click .

A drop-down list is displayed.

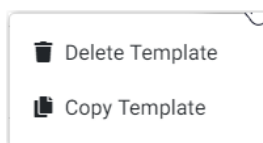




Figure 16.8 – More Options Drop-Down List

- Click **Copy Template**.

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

- Rename the template to a different name.
- Select the **Favorite** check box if you want to designate this template as a favorite.

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

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

## Deleting a Template

You can delete a template that you no longer need.

To delete an existing template:

1. On the Dashboard menu, click **Templates**.

The *Templates* page is displayed.

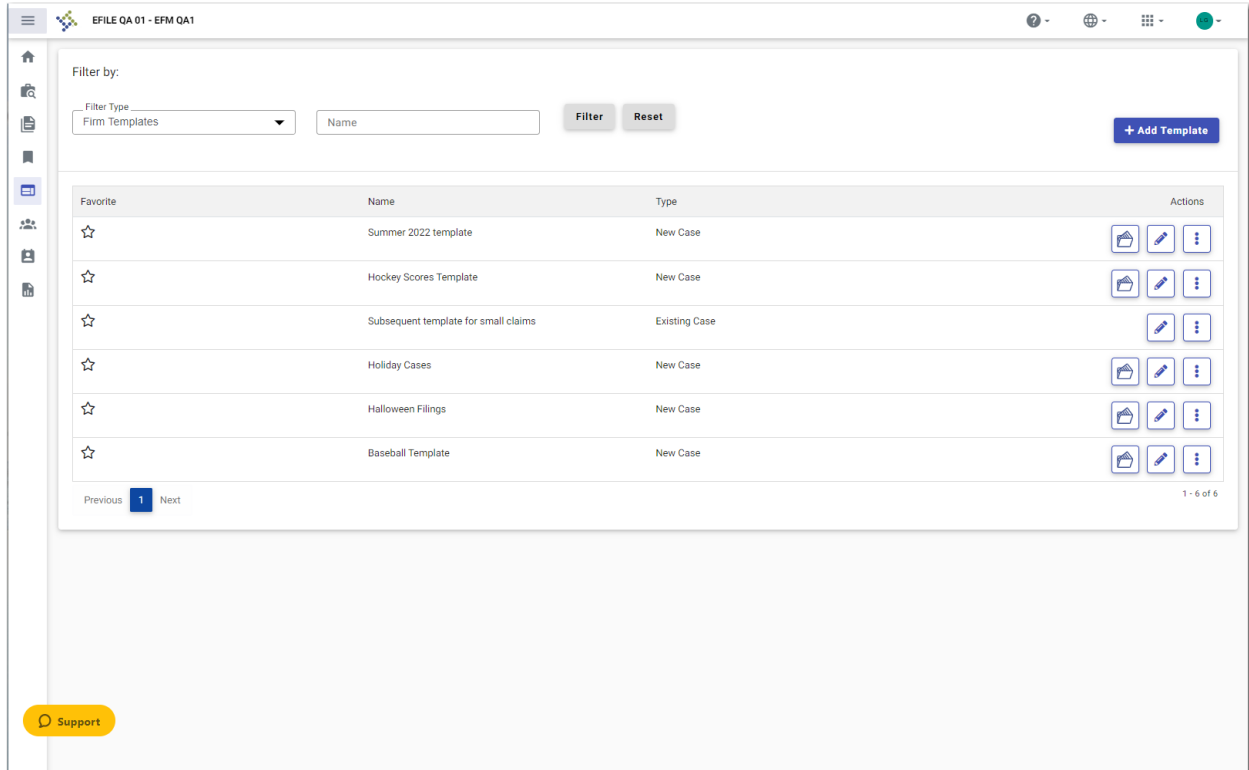



Figure 16.9 – Templates Page

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

A drop-down list is displayed.

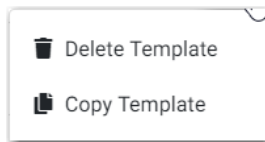

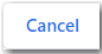
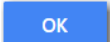


Figure 16.10 – More Options Drop-Down List

3. Click **Delete Template**.

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

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

If you clicked , a confirmation message is displayed, and the template is deleted.

# 17 Filings

## Topics covered in this chapter

- ◆ Copying the Envelope
- ◆ Viewing the Envelope Details
- ◆ Viewing Case Address Information in the Envelope Details
- ◆ Viewing Mail Service Fees in the Envelope Details
- ◆ Viewing Certified Mail Services Information in Envelope Details
- ◆ Viewing Envelope Level Information in the Envelope Details
- ◆ Resuming a Case Filing
- ◆ Deleting a Draft Filing
- ◆ Canceling a Filing

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

## Copying the Envelope

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

To copy an envelope:

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

The *Filing History* page is displayed.



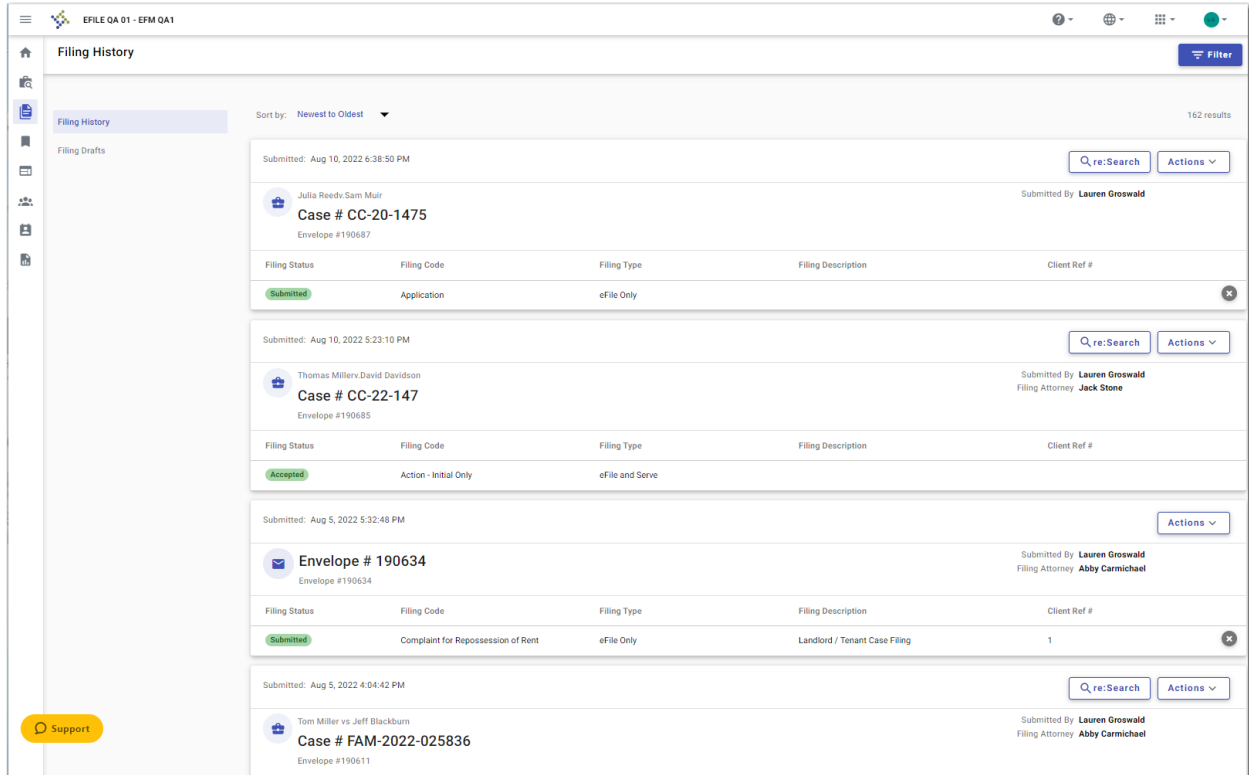


Figure 17.1 – Example of a Filing History Page

2. Click  .

The Filters pane is displayed.

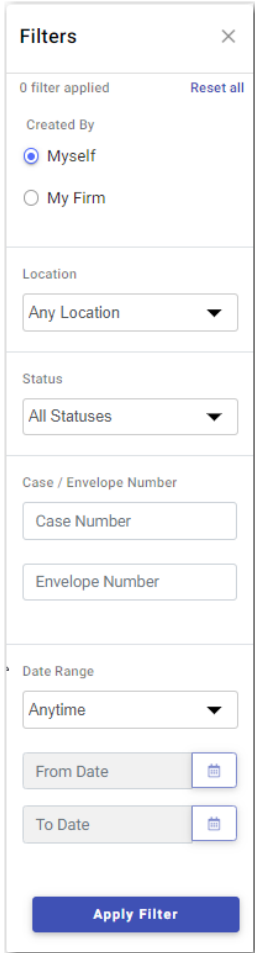
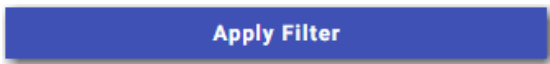


Figure 17.2 – Filters Pane

3. Set the filters for each category. In the **Status** section, select **Rejected**.

4. After you have created your filter, click



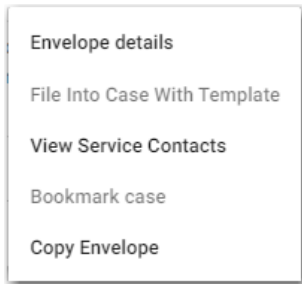
The envelopes with a filing status of **Rejected** are displayed.

5. Locate the envelope that you want to copy.

6. Click



The actions menu for the specified envelope is displayed.



**Figure 17.3 – Actions Menu**

7. Click **Copy Envelope**.

A copy of the envelope is displayed on the *Case Information* page.

 A screenshot of a web application interface titled "New Case Filing" with a draft number "10273". A progress bar at the top shows six steps: "1 Case Information", "Parties", "Filings", "Service", "Fees", and "6 Summary". The "Case Information" section is active and contains three dropdown menus:
 

- Court location \***: "OFS QA 2018 - Court at Law" with a URL below: <https://www.dallascounty.org/government/courts/>
- Case category \***: "Family"
- Case type \***: "Other Family Law Matters"

 A note at the bottom of the section reads: "If you can't find your case type, change the case category to see other case types."

**Figure 17.4 – Example of a Case Information Page for a Copied Envelope**

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

9. Review the information on the *Summary* page. If everything is correct, click .

**Note:** A message on the *Summary* page indicates that the envelope is a copy.

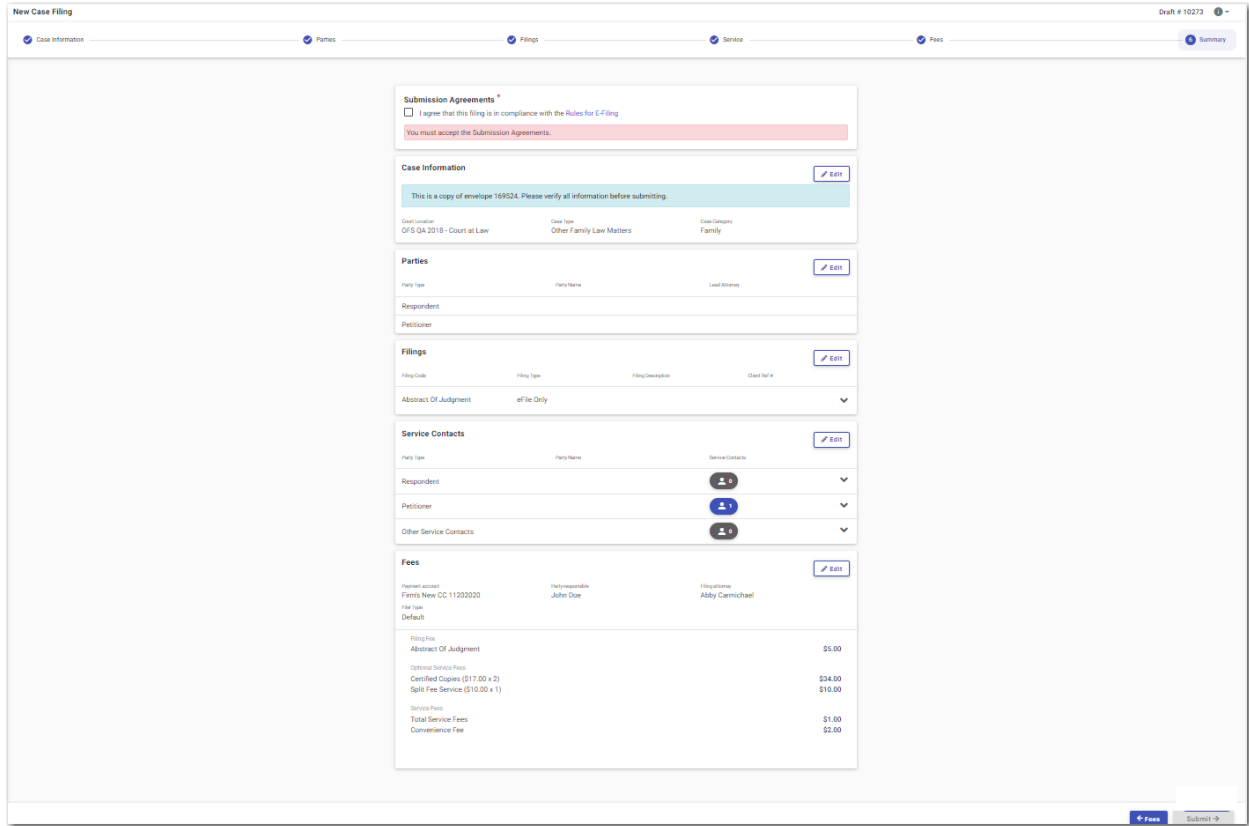


Figure 17.5 – Example of a Summary Page for a Copied Envelope

## Viewing the Envelope Details

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

To view the envelope details:

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

The *Filing History* page is displayed.

The screenshot shows the 'Filing History' page with the following data:

Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #
Submitted	Application	eFile Only		
Accepted	Action - Initial Only	eFile and Serve		
Submitted	Complaint for Repossession of Rent	eFile Only	Landlord / Tenant Case Filing	1
Submitted				

Figure 17.6 – Example of a Filing History Page

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

3. Click .

The actions menu for the specified envelope is displayed.

- Envelope details
- File Into Case
- File Into Case With Template
- View Service Contacts
- Bookmark case
- Copy Envelope

Figure 17.7 – Actions Menu

4. From the actions menu, click **Envelope details**.

The envelope details for the specified envelope are displayed.

**Note:** For subsequent filings, the envelope details do NOT include newly added parties if the envelope has not been accepted yet.

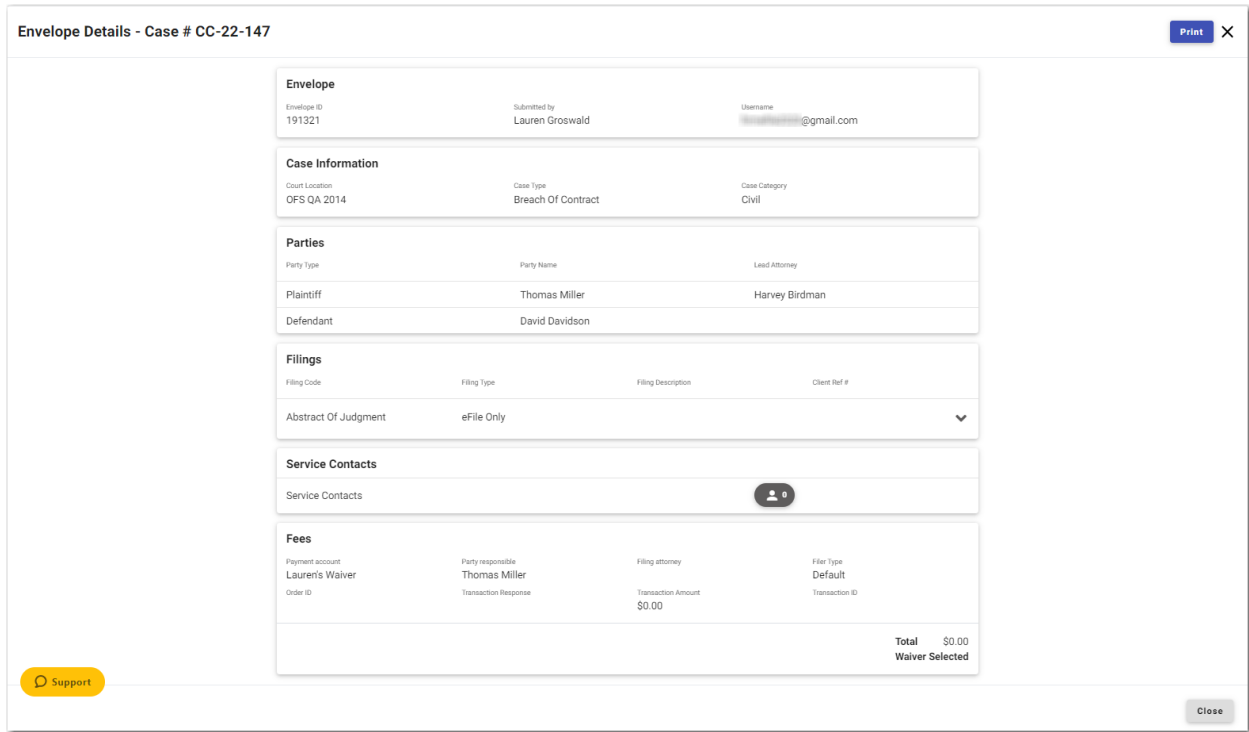



Figure 17.8 – Example of an Envelope Details Page

5. Click  to print a copy of the envelope details.

## Viewing Case Address Information in the Envelope Details

You can view the case address information and other details of an envelope on the *Filing History* page.

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

To view the case address information in the envelope details:

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

The *Filing History* page is displayed.

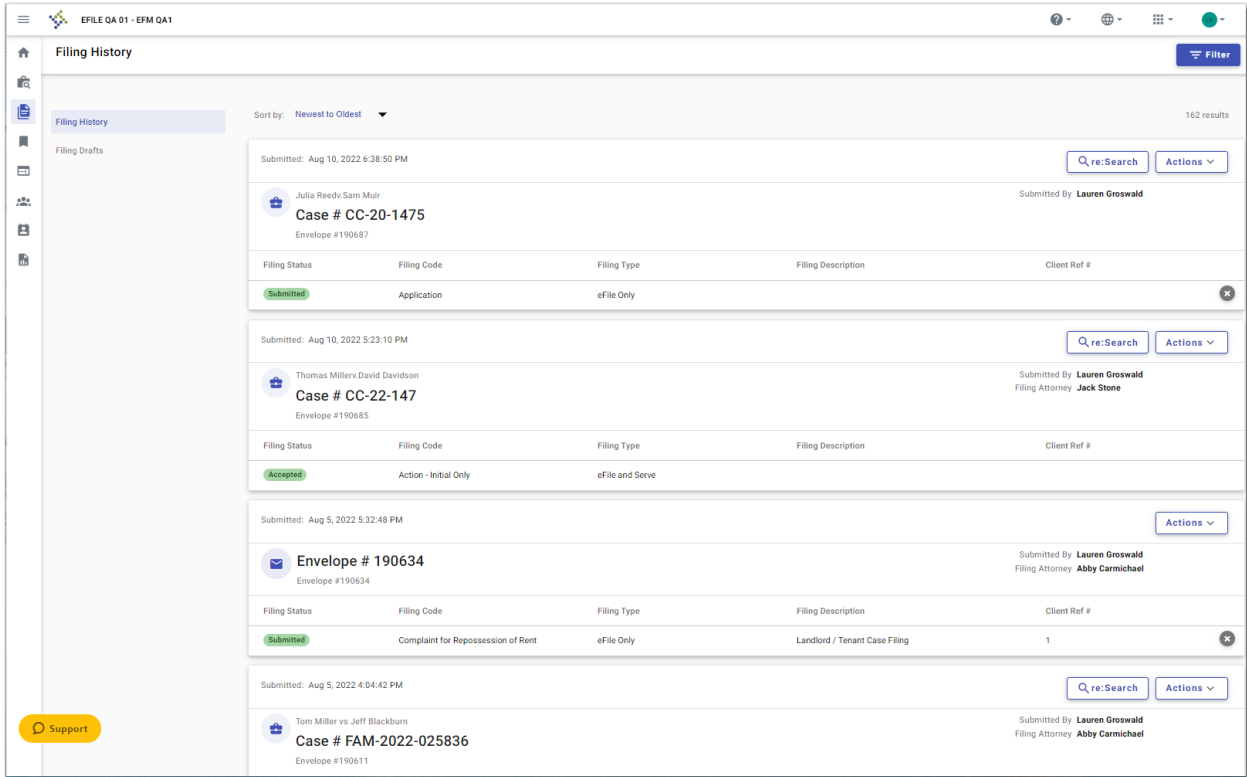


Figure 17.9 – Example of a Filing History Page

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

3. Click .

The actions menu for the specified envelope is displayed.

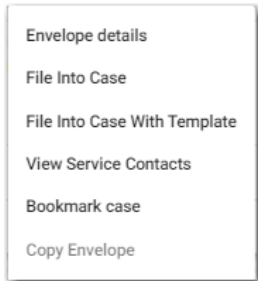


Figure 17.10 – Actions Menu

4. From the actions menu, click **Envelope details**.

The envelope details are displayed.

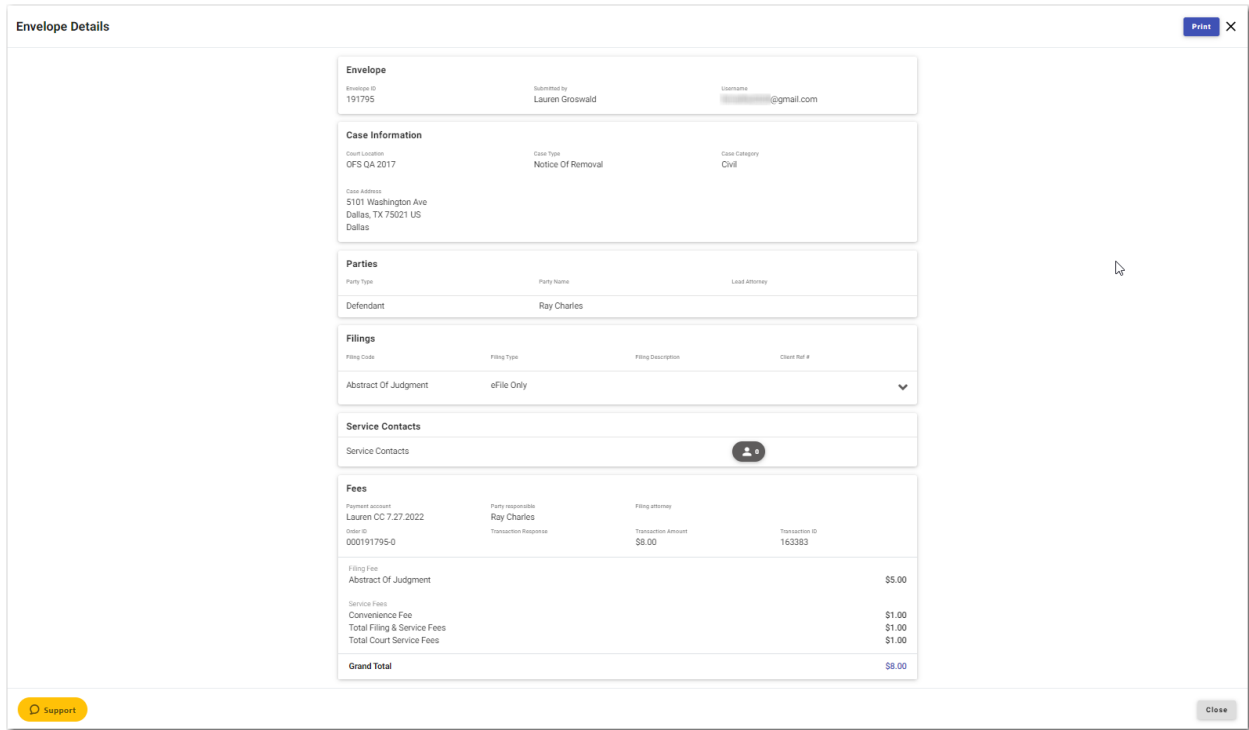
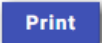


Figure 17.11 – Example of the Case Address Information on the Envelope Details Page

- Click  to print a copy of the envelope details.

## Viewing Mail Service Fees in the Envelope Details

You can view the mail service fees in the envelope details.

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

To view the mail service fees in the envelope details:

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

The *Filing History* page is displayed.



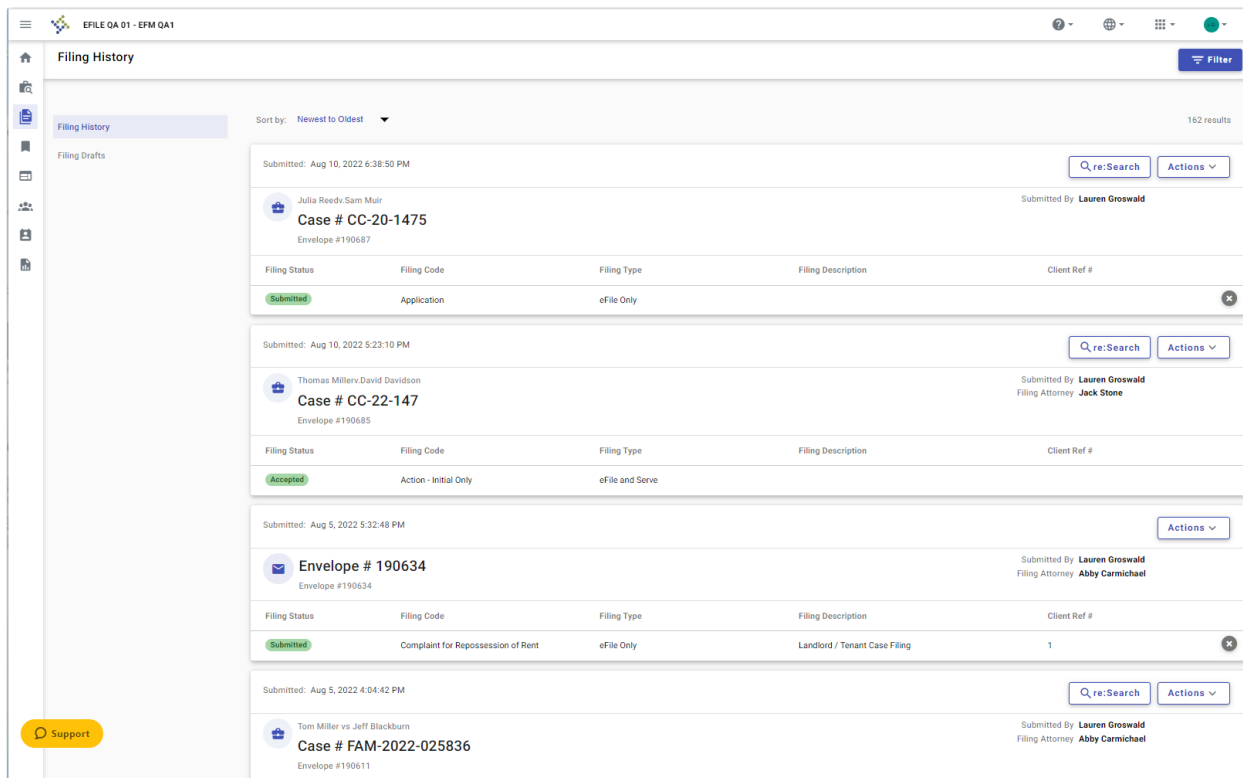


Figure 17.12 – Example of a Filing History Page

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

3. Click .

The actions menu for the specified envelope is displayed.

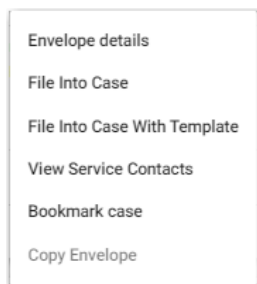


Figure 17.13 – Actions Menu

4. From the actions menu, click **Envelope details**.

The mail service fees are displayed in the envelope details.

**Note:** Your screen may differ from the example provided below.

Details - Case # CC-21-117 - Envelope # 256195

**Case**  
 Case: QFS-QA-2017  
 Category: Civil  
 Type: Appeal

**Parties**  
 Count: 2

**Filings**

Filing Type	Filing Code	Client Ref #	Filing Description
eFile Only	Abstract Of Judgment		
Submitted Date: 01/21/2021 11:13 AM	Status: Accepted	Filing Date: 01/21/2021 11:16 AM	Comments: Auto-Review Accepted

**Attachments**

Component Name	Document Name	Description	Security
Download Version: Original	Petition.pdf		Public (G)
Download Version: Original	Court Copy		
Component Name: Lead Document	BlankTest.pdf		Public (G)
Download Version: Original	Court Copy		

**Service**  
 Count: 2

**Fees**

Filing Name	Filing Amount	Firm's Responsible For Fees	Filing Type
Firm's CC	Abby Carmichael	Naomi Watson	AutoReview
Order ID: 000256195-0	Transaction Response: Approved	Transaction Amount: \$20.00	Transaction ID: 260829

**Abstract Of Judgment**

Filing Fee	\$5.00
<b>Subtotal</b>	<b>\$5.00</b>


**Mail Service Fees**

Total Mail Service Fees	\$12.00
<b>Subtotal</b>	<b>\$12.00</b>

**Service Fees**

Convenience Fee	\$1.00
Total Filing & Service Fees	\$1.00
Total Court Service Fees	\$1.00
<b>Subtotal</b>	<b>\$3.00</b>
<b>Grand Total</b>	<b>\$20.00</b>

Figure 17.14 – Example of an Envelope Details Page with the Mail Service Fees Displayed

- Click  to print a copy of the envelope details.

## Viewing Certified Mail Services Information in Envelope Details

You can view the status of certified mail for a specified filing.

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

To view the certified mail services information in the envelope details:

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

The *Filing History* page is displayed.

The screenshot displays the 'Filing History' page. At the top, it shows 'EFILE QA 01 - EFM QA1' and a 'Filter' button. The page is sorted by 'Newest to Oldest' and shows 162 results. The main content area lists four filings:

- Case # CC-20-1475**: Submitted Aug 10, 2022 6:38:50 PM. Filing Status: Submitted. Filing Code: Application. Filing Type: eFile Only. Submitted by Lauren Groswald.
- Case # CC-22-147**: Submitted Aug 10, 2022 5:23:10 PM. Filing Status: Accepted. Filing Code: Action - Initial Only. Filing Type: eFile and Serve. Submitted by Lauren Groswald, Filing Attorney Jack Stone.
- Envelope # 190634**: Submitted Aug 5, 2022 5:32:48 PM. Filing Status: Submitted. Filing Code: Complaint for Repossession of Rent. Filing Type: eFile Only. Filing Description: Landlord / Tenant Case Filing. Client Ref #: 1. Submitted by Lauren Groswald, Filing Attorney Abby Carmichael.
- Case # FAM-2022-025836**: Submitted Aug 5, 2022 4:04:42 PM. Filing Status: Submitted. Filing Code: Complaint for Repossession of Rent. Filing Type: eFile Only. Filing Description: Landlord / Tenant Case Filing. Client Ref #: 1. Submitted by Lauren Groswald, Filing Attorney Abby Carmichael.

Figure 17.15 – Example of a Filing History Page

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

3. Click .

The actions menu for the specified envelope is displayed.

- Envelope details
- File Into Case
- File Into Case With Template
- View Service Contacts
- Bookmark case
- Copy Envelope

Figure 17.16 – Actions Menu

4. From the actions menu, click **Envelope details**.

The envelope details are displayed.

**Note:** Your screen may differ from the example provided below.

Details - Case # CC-21-116 - Envelope # 256191 PRINT CLOSE

---

**Case**

Location OFS QA 2017	Category Civil	Type Breach Of Contract
-------------------------	-------------------	----------------------------

---

**Parties** Show All

Count: 2

---

**Filings**

Filing Type eFile Only	Filing Code Abstract Of Judgment	Client Ref #	Filing Description
Submitted Date 01/21/2021 10:32 AM	Status Accepted	Review Date 01/21/2021 10:35 AM	Comments Auto Review Accepted

---

Component Lead Document	Document Name BlankTest.pdf	Description	Security Public (G)
<a href="#">Download Version</a> Original	<a href="#">Court Copy</a>		

---

**Service** Hide all

Count: 3

<p>Firm Admin [redacted]@gmail.com Status: Sent (Opened) Served Date: 01/21/2021 10:35 AM Associated Parties: None</p> <p>Service Method: Eserve Opened Date: 01/21/2021 11:08 AM</p>	<p>Lillian Henderson 1201 tenth ave Plano US, Texas Status: Not Sent Tracking: 00000000000000000000000075025 (USPS) Associated Parties: None</p>
<p>Raymond Thompson 4201 Ohio Dr Dallas US, Texas Status: Not Sent Tracking: 00000000000000000000000075024 (USPS) Associated Parties: None</p>	

**Figure 17.17 – Example of an Envelope Details Page with the Certified Mail Services Information Displayed**

In the Service pane, you can view information about the status of certified mail for a specified filing.

5. Click the link in the tracking section to track the status of the certified mail.

**Note: Clicking the link accesses the United States Postal Service (USPS) website, which is displayed in a new tab in your browser.**

6. Follow the instructions on the USPS website to track the status of the certified mail, which can include obtaining an image with proof of delivery.

## Viewing Envelope Level Information in the Envelope Details

You can view the envelope comments that were added to a case filing in the envelope details.

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

To view the envelope comments in the envelope details:

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

The *Filing History* page is displayed.

The screenshot displays the 'Filing History' page. At the top, it shows 'Sort by: Newest to Oldest' and '162 results'. The page lists several filings, each with a 'Submitted' or 'Accepted' status and an 'Actions' button. The filings are:

- Submitted: Aug 10, 2022 6:38:50 PM. Case # CC-20-1475, Envelope #190687. Filing Status: Submitted. Filing Code: Application. Filing Type: eFile Only.
- Submitted: Aug 10, 2022 5:23:10 PM. Case # CC-22-147, Envelope #190685. Filing Status: Accepted. Filing Code: Action - Initial Only. Filing Type: eFile and Serve.
- Submitted: Aug 5, 2022 5:32:48 PM. Envelope # 190634, Envelope #190634. Filing Status: Submitted. Filing Code: Complaint for Repossession of Rent. Filing Type: eFile Only. Filing Description: Landlord / Tenant Case Filing. Client Ref #: 1.
- Submitted: Aug 5, 2022 4:04:42 PM. Case # FAM-2022-025836, Envelope #190611. Filing Status: Submitted.

Figure 17.18 – Example of a Filing History Page

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

3. Click .

The actions menu for the specified envelope is displayed.

The Actions menu is displayed as a vertical list of options:

- Envelope details
- File Into Case
- File Into Case With Template
- View Service Contacts
- Bookmark case
- Copy Envelope

Figure 17.19 – Actions Menu

4. From the actions menu, click **Envelope details**.

The envelope comments are displayed in the envelope details in the Case Information pane.

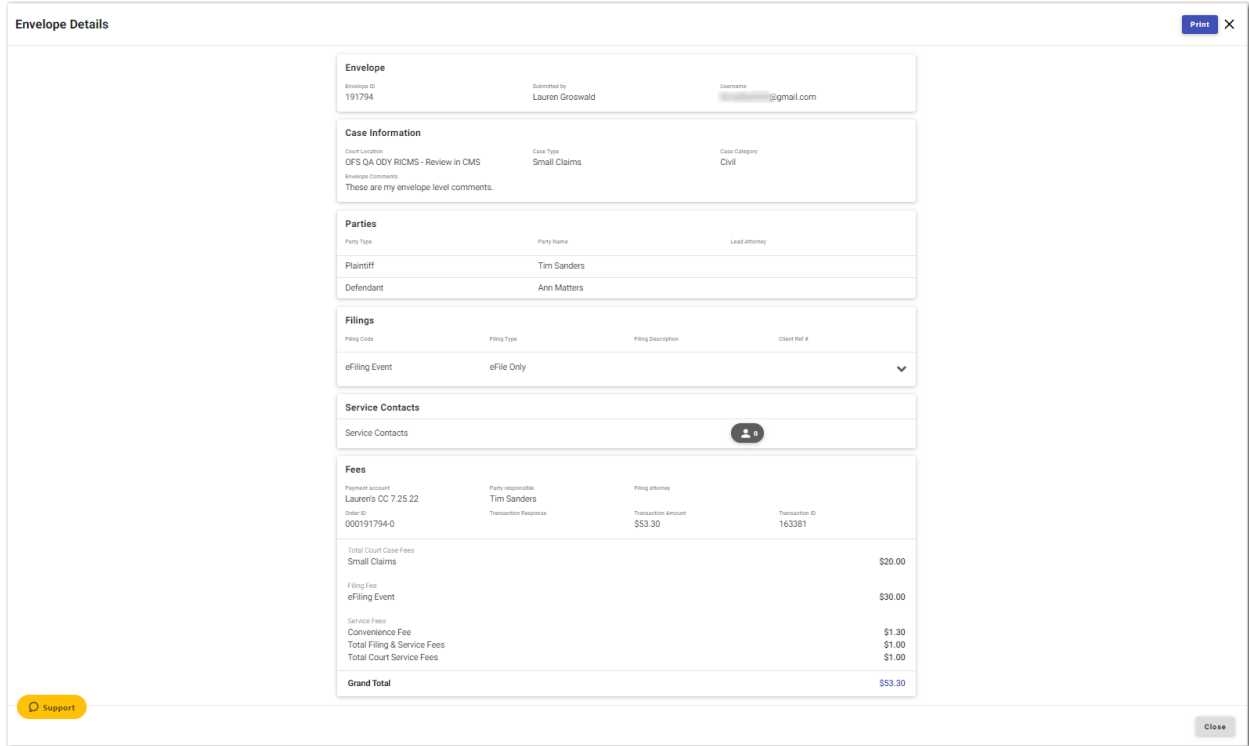



Figure 17.20 – Example of an Envelope Details Page with the Envelope Comments Displayed

5. Click  to print a copy of the envelope details.

## Resuming a Case Filing

You can resume a case filing even if you have signed out of File & Serve or have exited the filing process. You do so by signing back in to File & Serve, if necessary, and then accessing your case on the *Filing Drafts* page.

To resume a case filing:

1. Locate the specified draft on the *Filing Drafts* page.

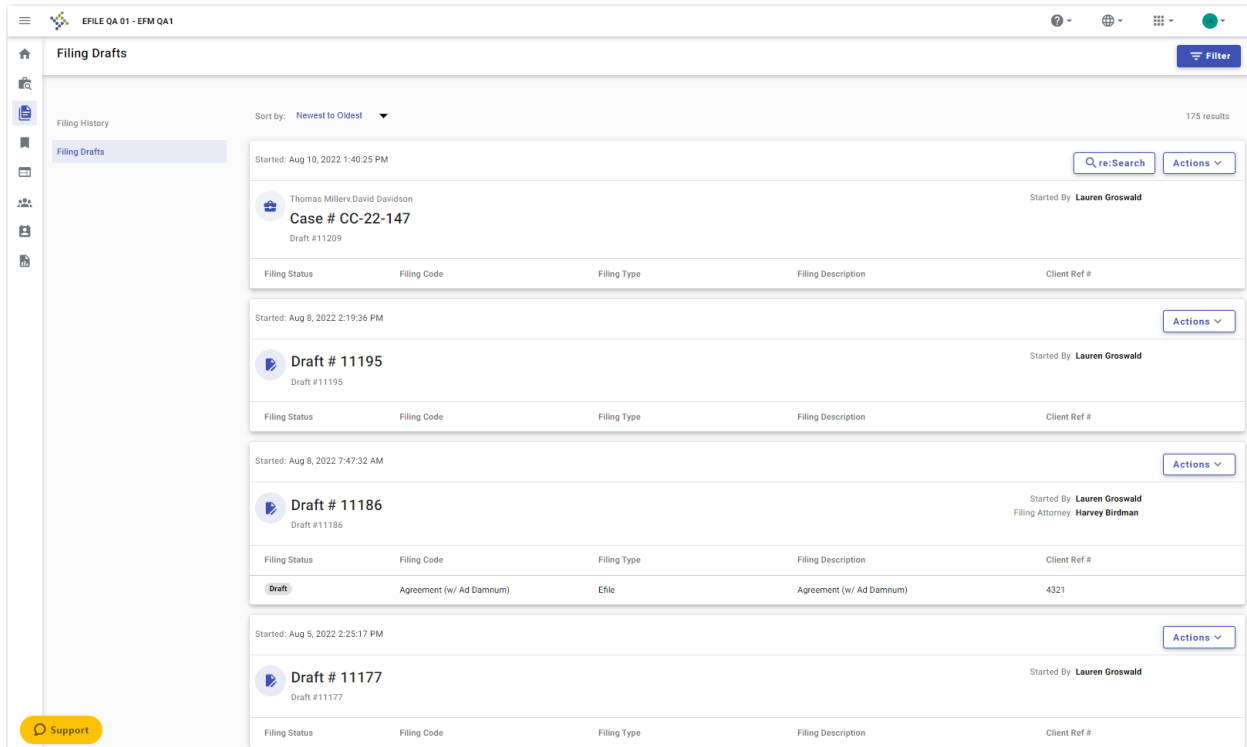


Figure 17.21 – Example of a Filing Drafts Page

2. Click .

The actions menu for the specified draft is displayed.

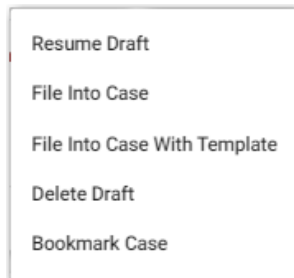


Figure 17.22 – Actions Menu

3. Click **Resume Draft**.

The filing opens on the page where you previously stopped working.

4. Make any corrections to your entries as needed.  
5. Continue completing the remaining required fields for the filing.

6. After you have completed all of the required fields, click .

# Deleting a Draft Filing

You can delete a draft filing that you no longer need.

To delete a draft filing:

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

The *Filing Drafts* page is displayed.

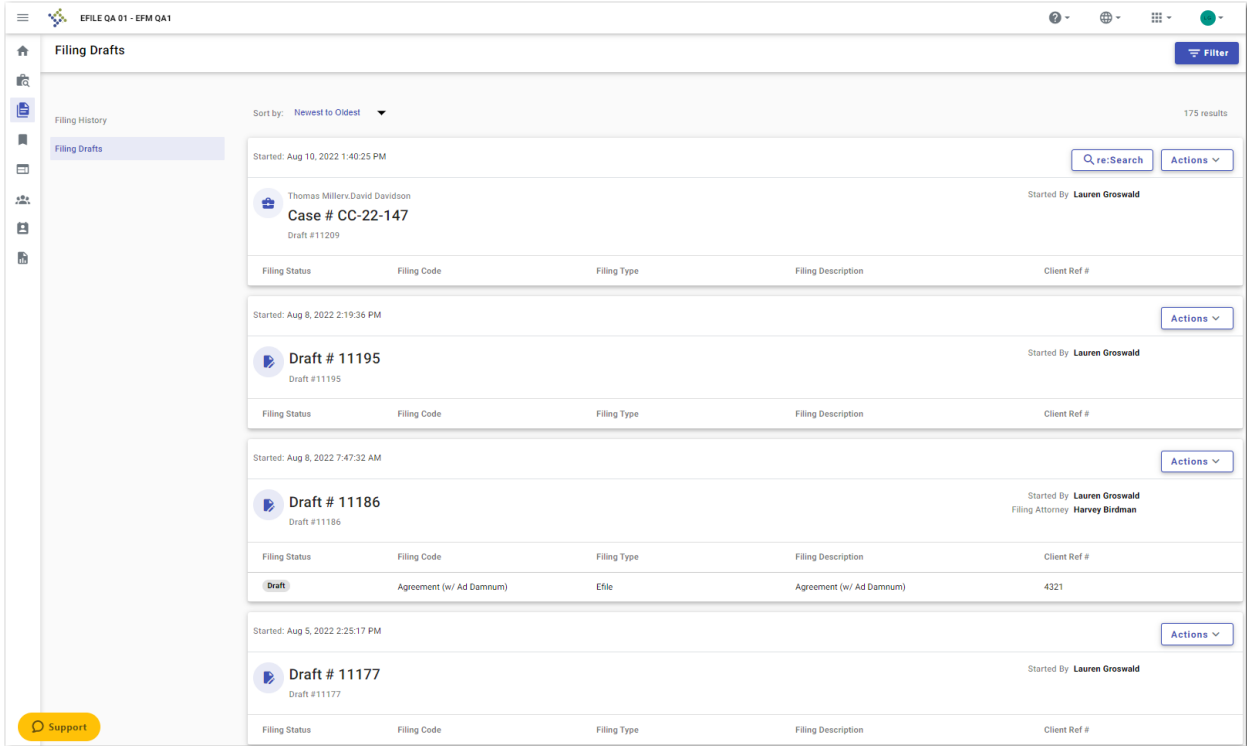
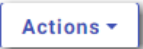


Figure 17.23 – Example of a Filing Drafts Page

2. Locate the draft filing that you want to delete, and then click .

The actions menu for the specified draft is displayed.

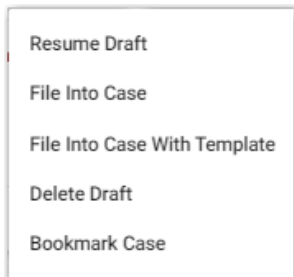
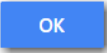
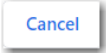


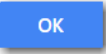
Figure 17.24 – Actions Menu

3. Click **Delete Draft**.

The following warning message is displayed: Are you sure you want to delete Draft # "123"?



4. Click  to delete the draft filing, or click  to cancel the action.

If you clicked , a confirmation message is displayed, and the draft filing is deleted.

## Canceling a Filing

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

To cancel a filing:

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

The *Filing History* page is displayed.

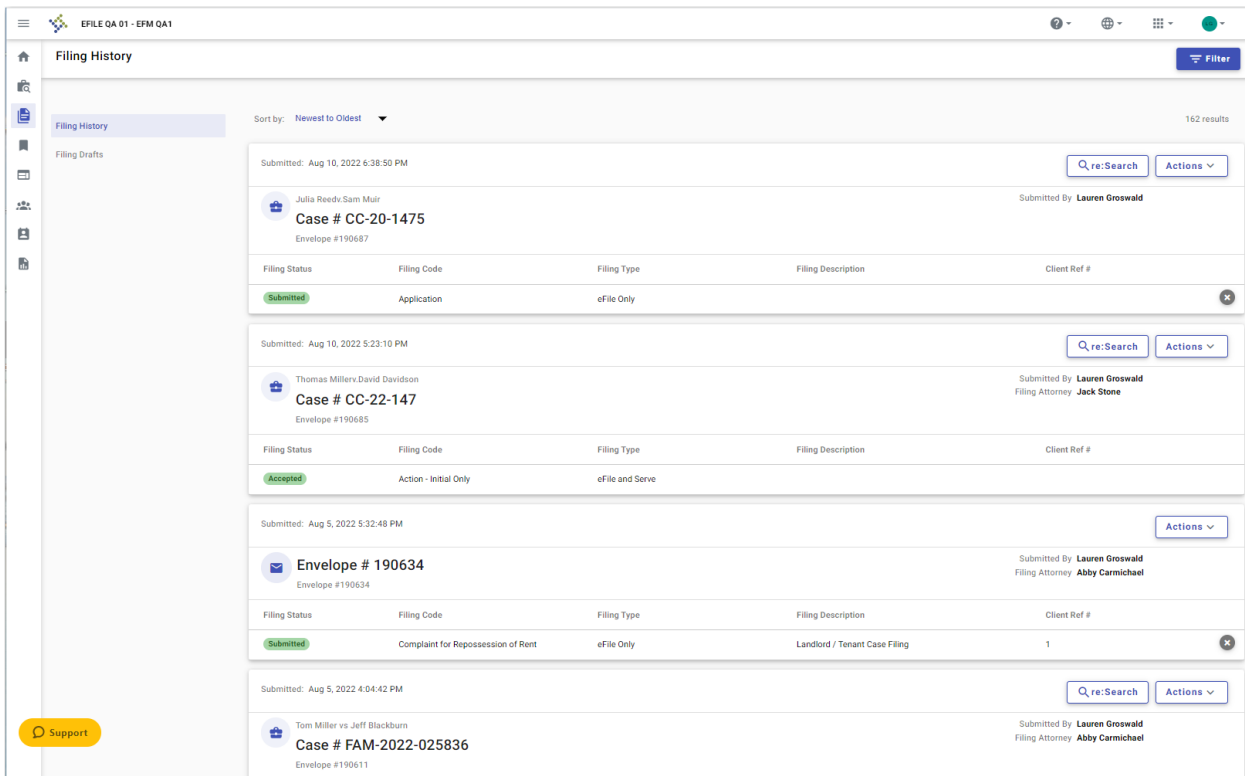


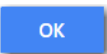
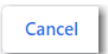
Figure 17.25 – Example of a Filing History Page

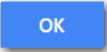
2. Locate the filing that you want to cancel.

**Note:** The filing must be in the **Submitting** or **Submitted** state to be canceled.

3. Click .

The following warning message is displayed: Are you sure you want to cancel this filing?

4. Click  to cancel the filing, or click  to cancel the action.

If you clicked  , a confirmation message is displayed, and the filing is canceled.

# 18 Bookmarks

## Topics covered in this chapter

- ◆ Creating a Bookmark for a Case
- ◆ Removing a Bookmark from a Case
- ◆ Viewing a List of Bookmarked Cases

The *Bookmarks* page displays a list of case numbers, locations, and descriptions for the cases that you have bookmarked. Only you can see this information. Neither the public nor any other user can see your case list.

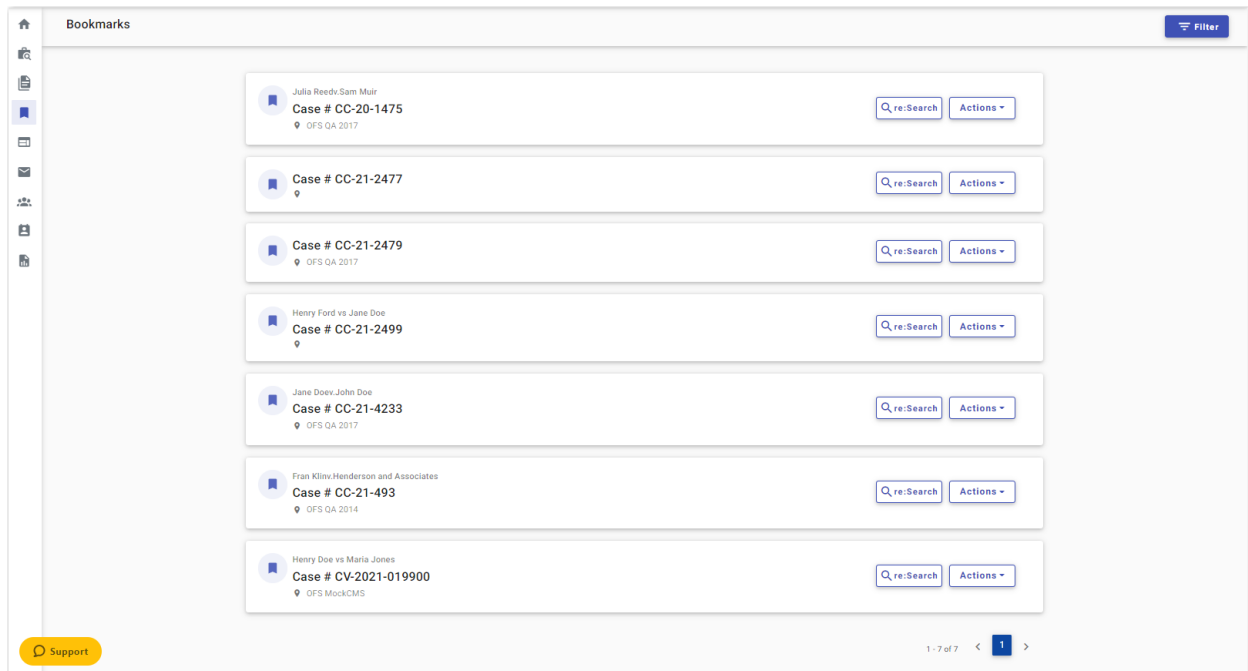
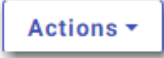


Figure 18.1 – Example of a Bookmarks Page

From the *Bookmarks* page, you can take further action on a specified case. Click  to view the actions menu for the case.

You can also view the case in re:Search if the ability to do so is configured, and if you have an account in

re:Search. Click . Then, sign in to the application to open re:Search.

**Note:** The ability to access re:Search from File & Serve is configured by Tyler and may not be available on your system. You also must have an existing account in re:Search to access it from File & Serve.

## Creating a Bookmark for a Case

You can create a bookmark for a case from both the *Filing History* page and the *Filing Drafts* page.

To create a bookmark for a case:

1. On the Dashboard menu, click either **Filing History** or **Filing Drafts**.

The page that you selected is displayed.

2. Locate the case or the draft filing that you want to bookmark, and then click .

The actions menu for the specified case or draft filing is displayed.

3. Click **Bookmark case**.

The case or draft filing that you bookmarked will now be displayed on the *Bookmarks* page.

## Removing a Bookmark from a Case

You can remove a bookmark from a case that you previously bookmarked.

To remove an existing bookmark from a case:

1. On the Dashboard menu, click **Bookmarks**.

The *Bookmarks* page is displayed.

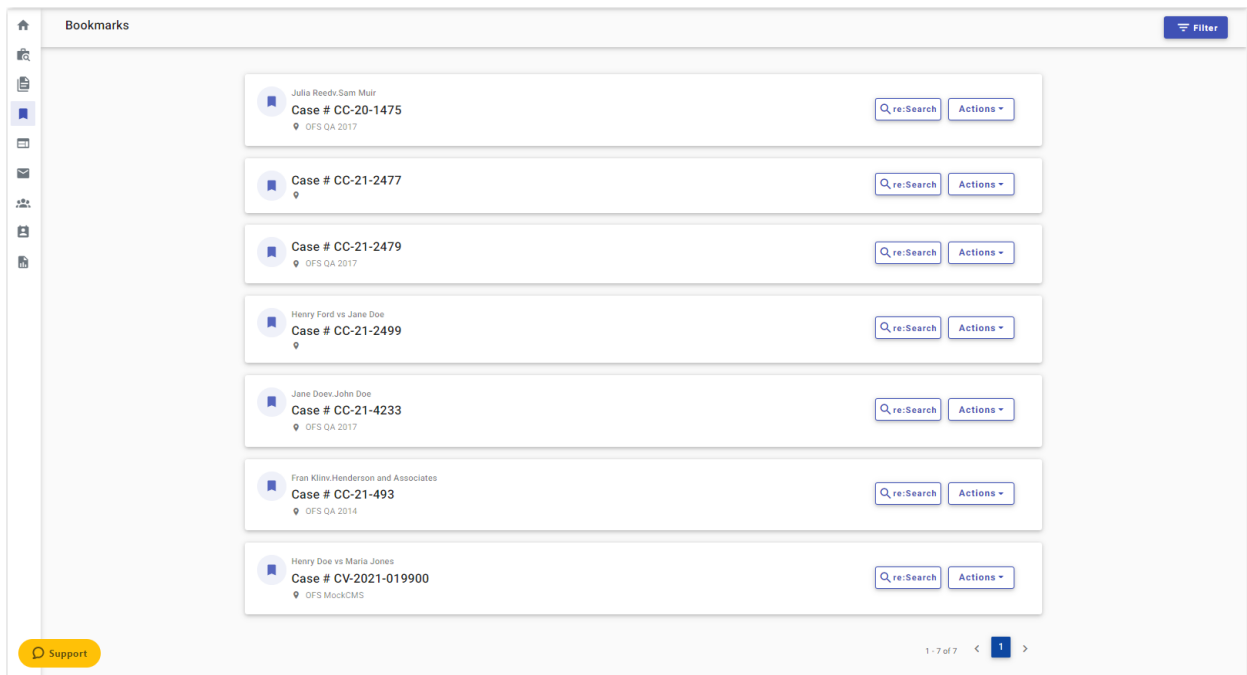

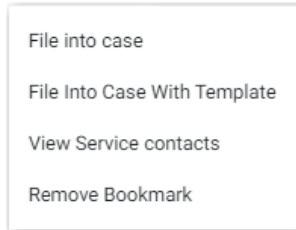


Figure 18.2 – Example of a Bookmarks Page

2. Locate the case for which you want to remove the bookmark, and then click .

The actions menu is displayed.



**Figure 18.3 – Actions Menu**

3. Select **Remove Bookmark**.

The following warning message is displayed: Are you sure you want to delete bookmark for Case # "CC-xy-abcd"?

4. Click  to remove the bookmark, or click  to cancel the action.

## Viewing a List of Bookmarked Cases

You can view a list of the cases that you have bookmarked for quick access. You can filter your view to only the specific cases that you want to see.

To view a list of cases that you have bookmarked:

1. On the Dashboard menu, click **Bookmarks**.

The *Bookmarks* page is displayed.

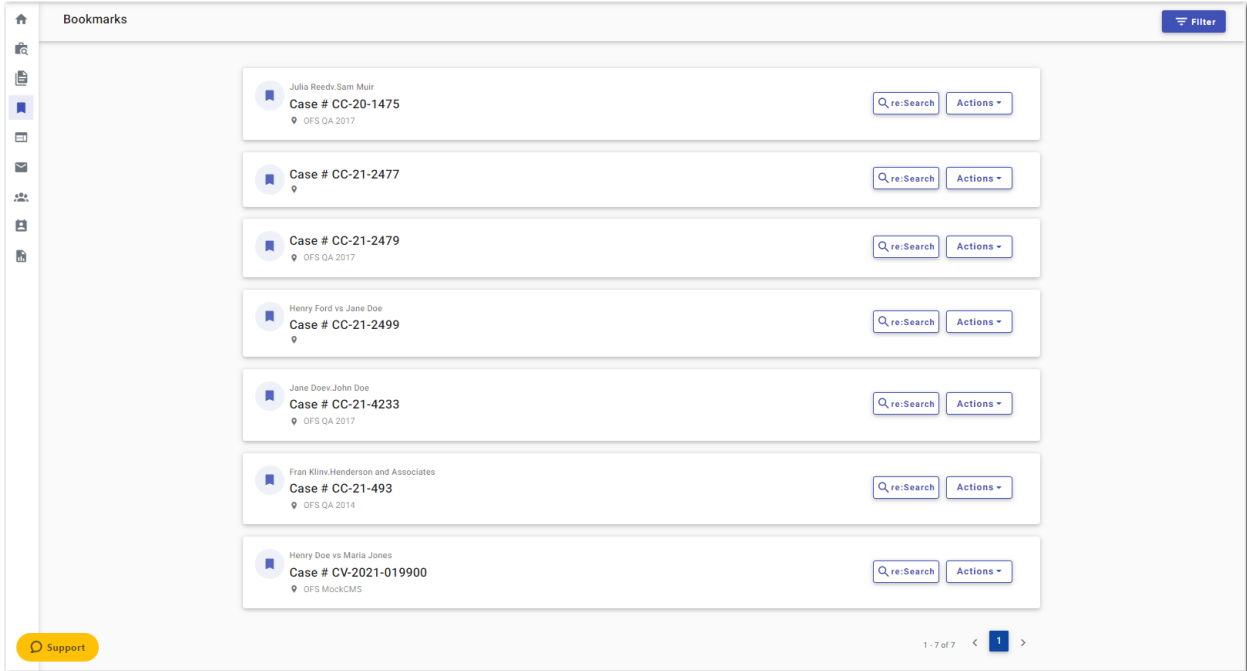



Figure 18.4 – Example of a Bookmarks Page

2. Click  .
3. Set the parameters for the cases that you want to view, and then click



The cases that you selected in your filter are now displayed on the *Bookmarks* page.

# 19 Bulk Filing

## Topics covered in this chapter

- ◆ Dashboard
- ◆ Starting Multiple New Case Filings
- ◆ Entering Case Information for a Bulk Filing
- ◆ Entering Party Details for a Bulk Filing
- ◆ Entering Filing Details for a Bulk Filing
- ◆ Entering Payment Information for a Bulk Filing
- ◆ Viewing the Envelope Summary for a Bulk Filing
- ◆ Associating Parties to a Bulk Filing
- ◆ Filing into a Bulk Filing That Contains Multiple Existing Cases
- ◆ Copying a Bulk Filing


Bulk filing allows you to create and submit a group of envelopes to the court at the same time. Some courts may provide discounts if a specified number of envelopes is submitted in the same bulk filing.


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

To set up a bulk filing, first access the *Start Filing* page. Then, complete the required fields for the first draft, followed by the next draft, and so forth. After you have prepared all of the drafts for a bulk filing, you can view the fees for each draft, and choose the party responsible for fees, along with the payment method, for each draft. When you are done, you can submit the bulk filing in its entirety.

A bulk filing must contain either all initial filings or all subsequent filings.

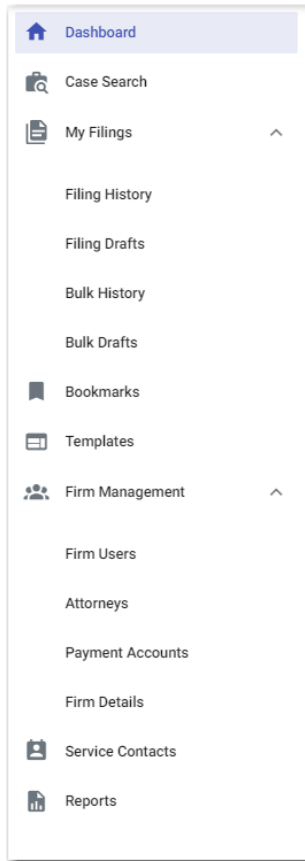
After a bulk filing has been created, you can add additional filings to the drafts by using the **Bulk Add Filings** feature.

A blue rectangular button with the text "Add Draft" in white, centered on the page.


Click  when the button is enabled on the *Bulk Filing Dashboard* page.

# Dashboard

The Dashboard provides a drop-down list for Firm Administrator actions.



**Figure 19.1 – Example of a Dashboard**

On the *Dashboard* page, click the Dashboard icon (  ) to view the Dashboard. The icon is a toggle, so you can click it again to hide the Dashboard. When the Dashboard is hidden, only the icons for each option are displayed.

From the Dashboard, you can perform the following additional actions for bulk filing:

- Access the *Dashboard* page to start an initial or subsequent bulk filing, view your bulk filing history, and view your bulk filing drafts.
- For subsequent bulk filings, you can add cases from the *Search for Case* page.
- For subsequent bulk filings, you can add cases from the *Filing History* page.
- Access the *Bulk History* page to view a list of your or your firm's bulk filings.
- Access the *Bulk Drafts* page to view a list of your or your firm's bulk draft filings.

For information regarding the other options displayed on the Dashboard, refer to [Dashboard](#), page 34.



## Bulk History

The *Bulk History* page includes the filing history for your and your firm's bulk filings.

From the Dashboard menu, click **Bulk History**. From here, you can view a history of your and your firm's bulk filings. You can also view the details for each case in the bulk filing.

The screenshot displays the 'Bulk History' page. On the left is a navigation sidebar with options: Filing History, Filing Drafts, Bulk History (selected), and Bulk Drafts. The main content area shows a list of bulk filings, sorted by 'Newest to Oldest'. The top entry is expanded to show details for 'Bulk # 509' submitted by Lauren Groswald on Aug 10, 2022, at 1:05:22 PM. This entry includes a case # CC-20-1475, envelope # 190687, and a table with the following data:

Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #
Submitted	Application	Efile		

Below the table, a list of other bulk filings is shown, each with a 'Copy' button and a dropdown arrow:

- Bulk # 501 - 8.5.22 VL (Submitted: Aug 5, 2022 9:46:06 AM)
- Bulk # 498 (Submitted: Aug 5, 2022 7:59:39 AM)
- Bulk # 497 (Submitted: Aug 5, 2022 7:02:32 AM)
- Bulk # 453 - Lauren's bulk 9.17 (Submitted: Jul 19, 2022 3:43:34 PM)
- Bulk # 425 - Wednesday Test (Submitted: May 25, 2022 4:35:15 PM)
- Bulk # 416 (Submitted: May 10, 2022 12:05:52 PM)

Figure 19.2 – Example of a Bulk History Page

## Bulk Drafts

The *Bulk Drafts* page includes the drafts of your and your firm's bulk filings.

On the Dashboard menu, click **Bulk Drafts**. From here, you can view a list of your and your firm's bulk filing drafts, resume a bulk filing draft, or delete a bulk filing draft.

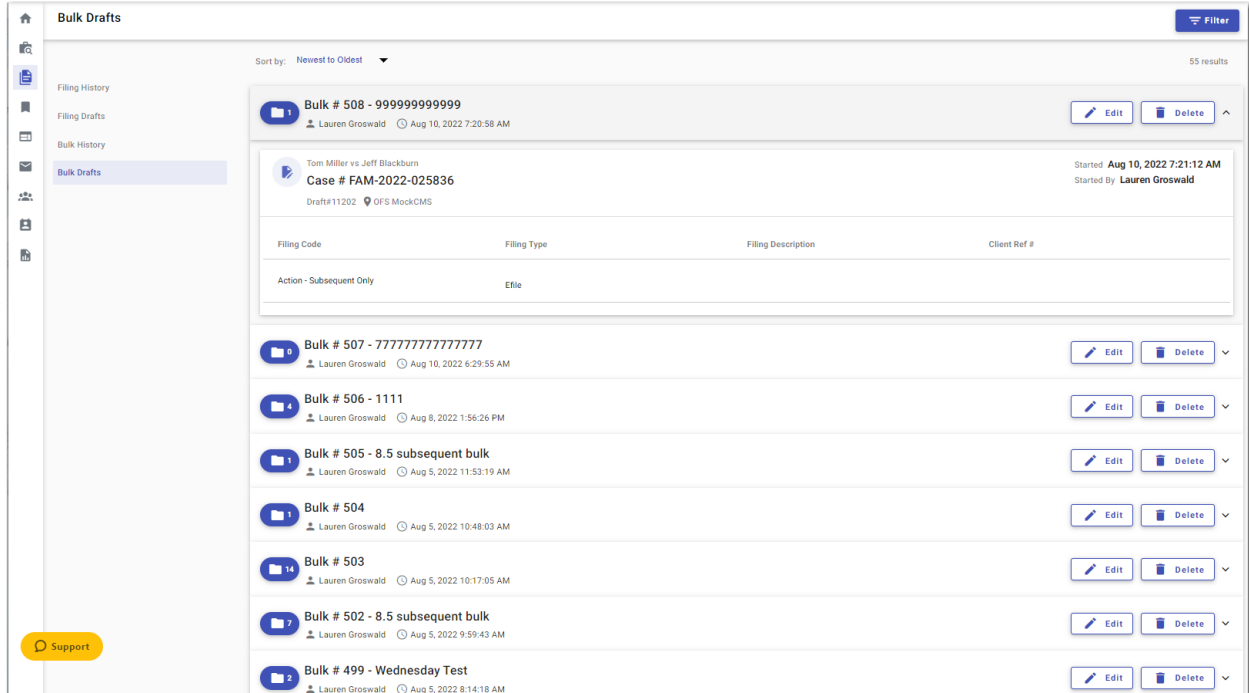


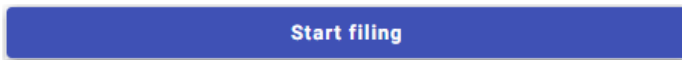
Figure 19.3 – Example of a Bulk Drafts Page

## Starting Multiple New Case Filings

You can create filings for multiple cases, which you can then file as one bulk filing.

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

To start multiple new case filings:



1. On the *Dashboard* page, click

The *Start Filing* page is displayed.

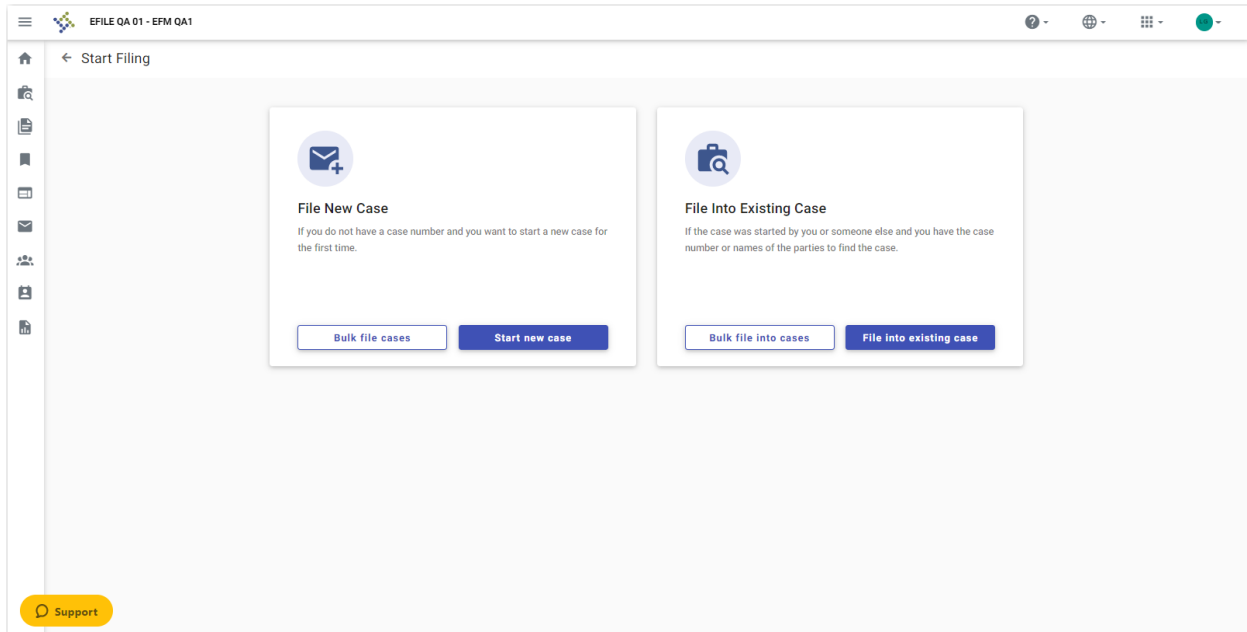



Figure 19.4 – Start Filing Page

2. Click .

The *Bulk Filing* window is displayed.

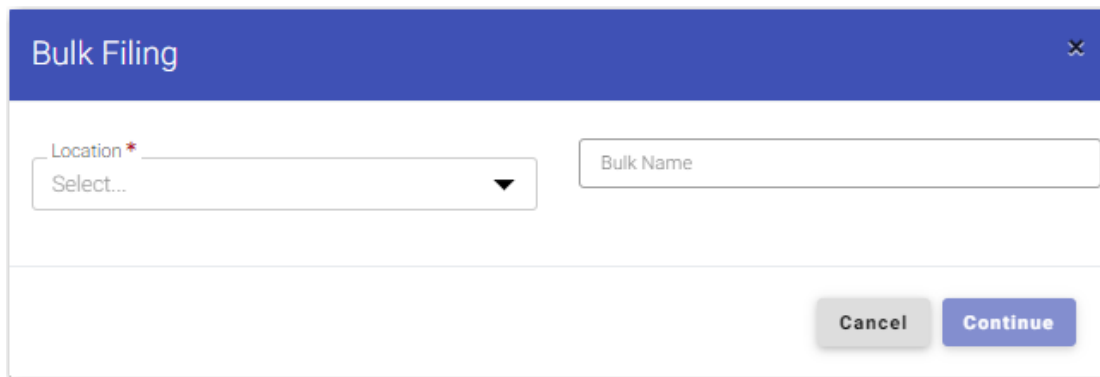



Figure 19.5 – Bulk Filing Window

3. Select the location from the **Location** drop-down list.
  4. Type a name for the bulk filing, and then click .
- The *Bulk Add Draft* page is displayed.

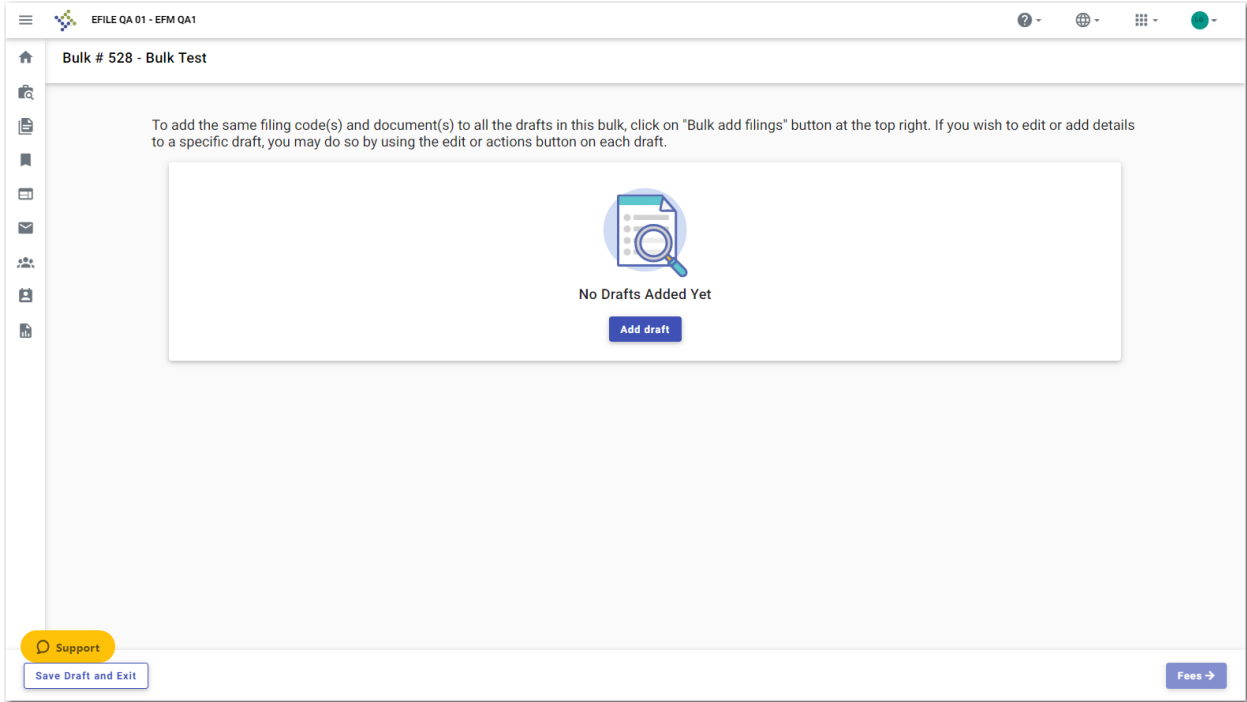
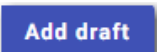


Figure 19.6 – Example of a Bulk Add Draft Page

5. Click .

The *Case Information* page is displayed.

## Entering Case Information for a Bulk Filing

Before you can start a bulk filing, you must set up a payment account.

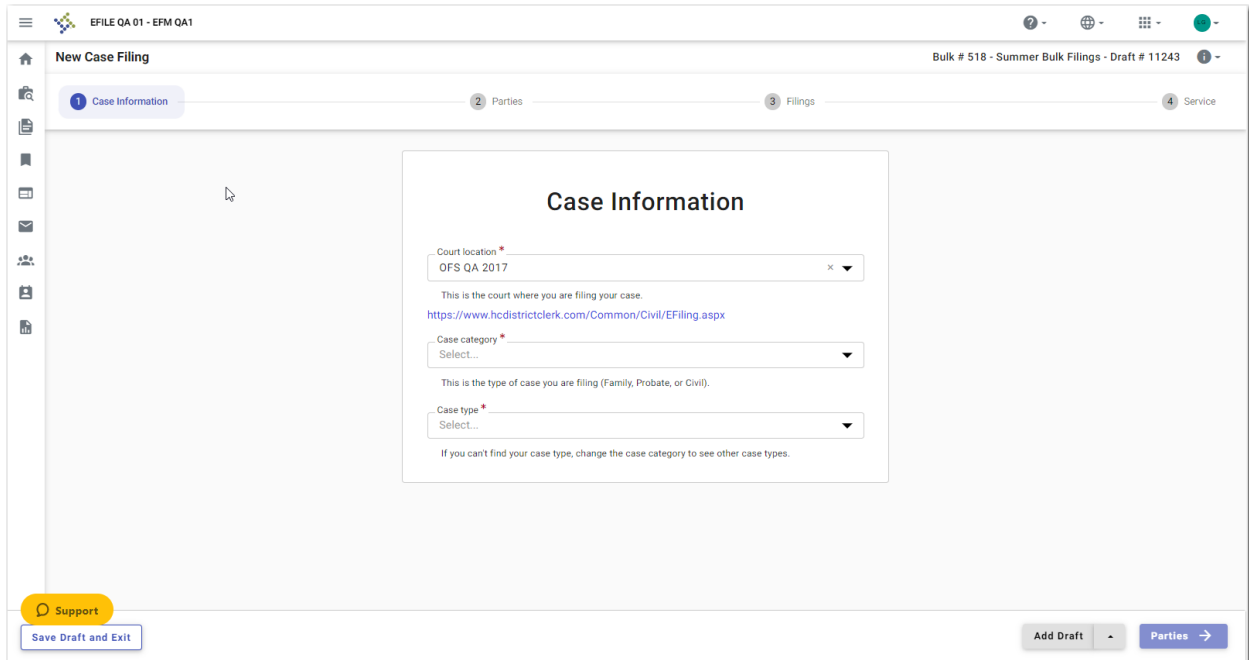



Figure 19.7 – Example of a Case Information Page

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

To enter case information:

1. Select the location from the **Court Location** drop-down list.
2. Select the case category from the **Case Category** drop-down list.
3. Select the case type from the **Case Type** drop-down list.
4. Complete the other fields, as applicable.

5. Click  to save your work and continue.

## Entering Party Details for a Bulk Filing

Each bulk filing requires a party type.

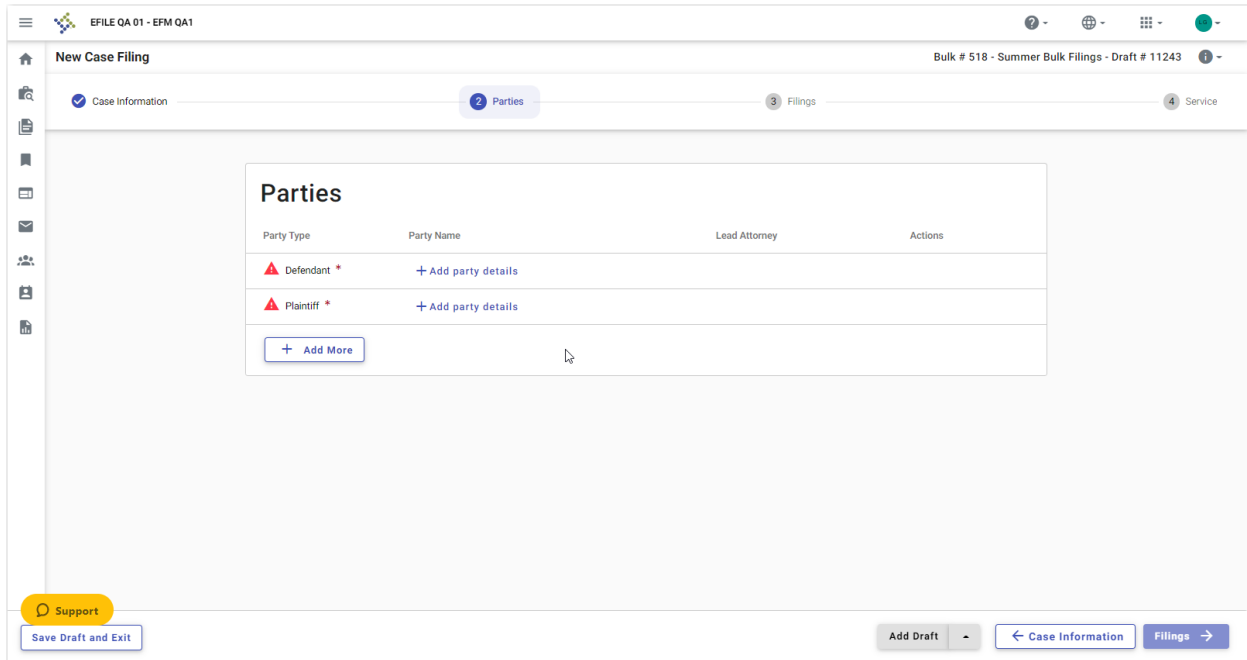


Figure 19.8 – Example of a Parties Page in a Bulk Filing

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

To enter the details for the parties involved in the case:

1. On the *Parties* page, select the party type that you want to begin to describe, and then click



The *Edit Party Details* window for the specified party is displayed.

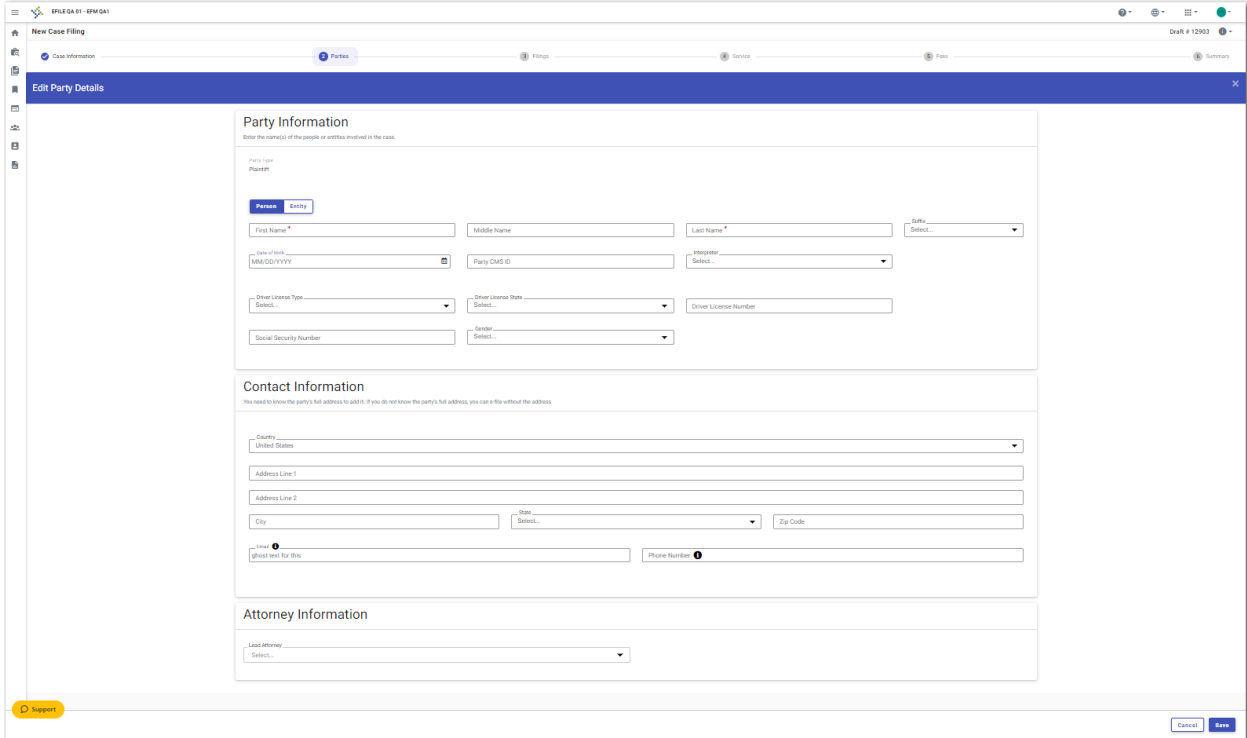



Figure 19.9 – Example of the Edit Party Details Window

2. Click either  or .

**Note:** The following steps describe the fields that are displayed if you select “Person.”

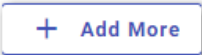
3. In the Party Information pane, complete the **First Name**, **Middle Name** (if applicable), and **Last Name** fields. Also, if appropriate, select the party’s suffix from the **Suffix** drop-down list.
4. Type the party’s date of birth in the **Date of Birth** field, or click  to select the date from the calendar.
5. Type the party case management system ID in the **Party CMS ID** field, if appropriate.
6. Select a language from the **Interpreter** drop-down list, if appropriate.
7. Select the type of driver’s license from the **Drivers License Type** drop-down list.
8. Select the state where the driver’s license was issued from the **Drivers License State** drop-down list.
9. Type the party’s driver’s license number in the **Drivers License Number** field.
10. Type the party’s Social Security number in the **Social Security Number** field.


**Note:** After you type the Social Security number, asterisks are displayed to hide the number.

11. Select the party’s gender from the **Gender** drop-down list.
12. In the Contact Information pane, enter the country, address, city, state, ZIP code, and phone number for the specified party.
13. In the Attorney Information pane, from the **Lead Attorney** drop-down list, select the filing attorney.
14. From the next field that is displayed, select additional attorneys, if any, that you want to add to the case.

15. After all of the required fields for the specified party are completed, click .

16. On the *Parties* page, complete the party information for the next party.

17. If you have another party to add to the case, click , and complete the party information for the additional party. Continue to add parties until all of the necessary parties have been added to the case.

18. Click  to save your work and continue.

## Entering Filing Details for a Bulk Filing

The **Filings** section allows you to enter the details for a bulk filing.

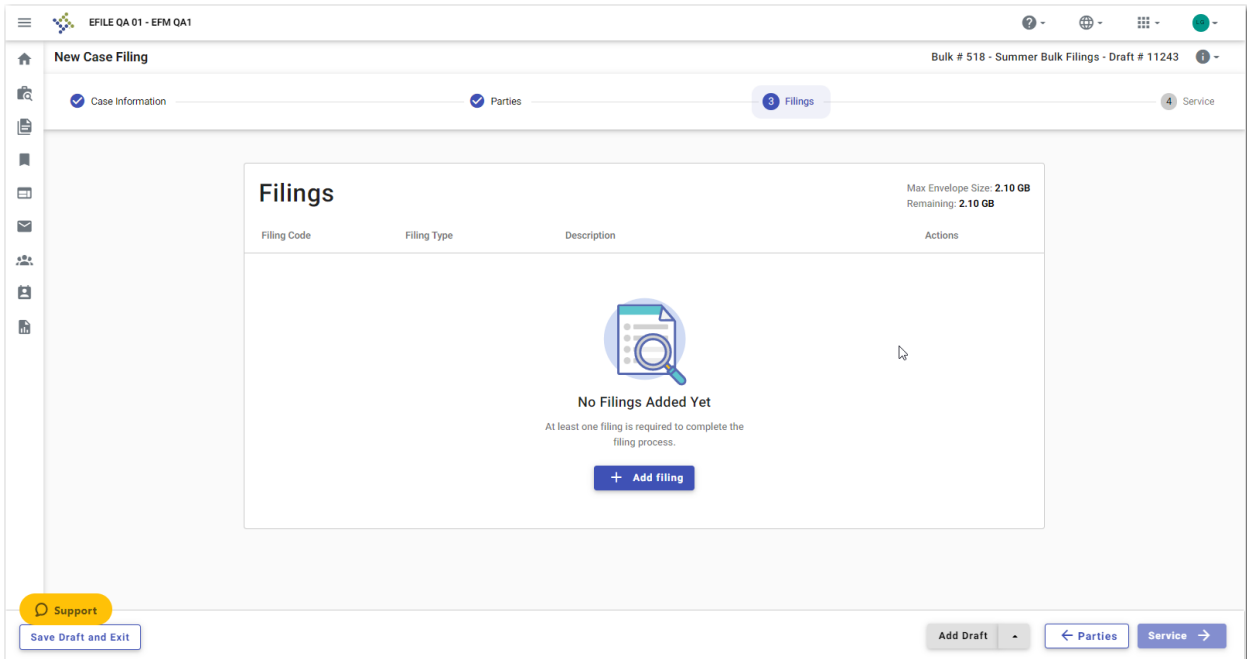



Figure 19.10 – Example of a Filings Page

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

To enter the details for a bulk filing:

1. On the *Filings* page, click .

The *Edit Filing Details* page is displayed.



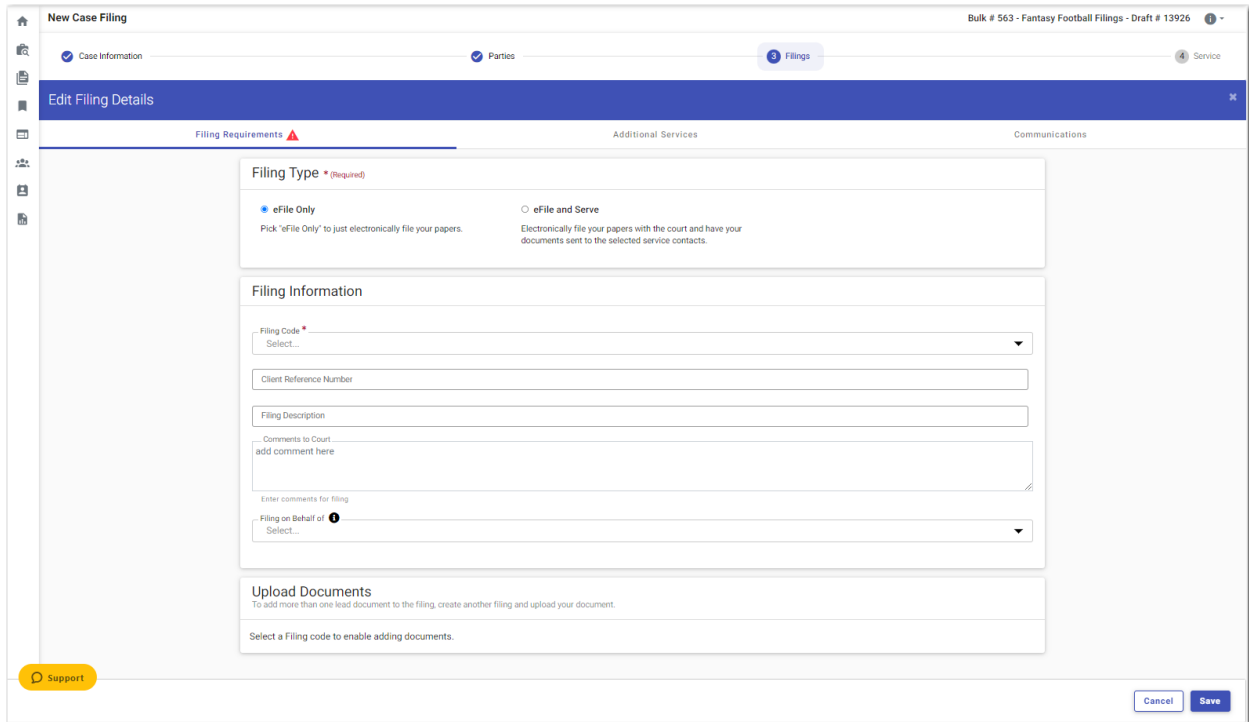



Figure 19.11 – Example of an Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.
5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.
8. In the Upload Documents pane, click . Then, select the document that you want to upload.

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

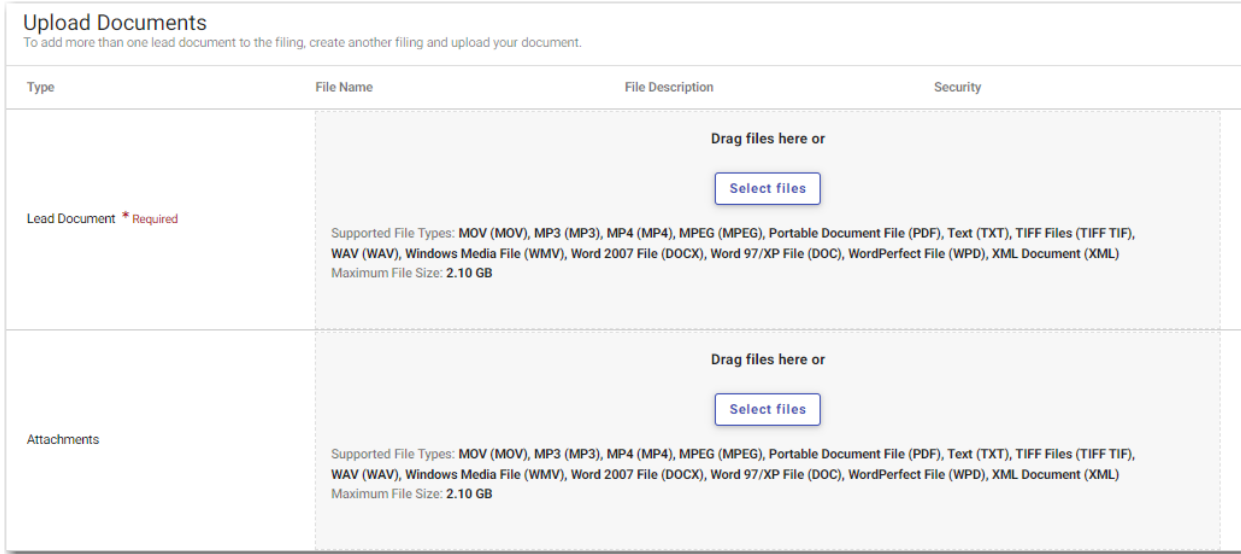
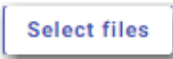


Figure 19.12 – Upload Documents Pane

9. If you have attachments to add to the filing, click  in the **Attachments** section. Then, upload the specified attachments.
10. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
11. To add additional services, click **Additional Services**.

The Additional Services pane is displayed.

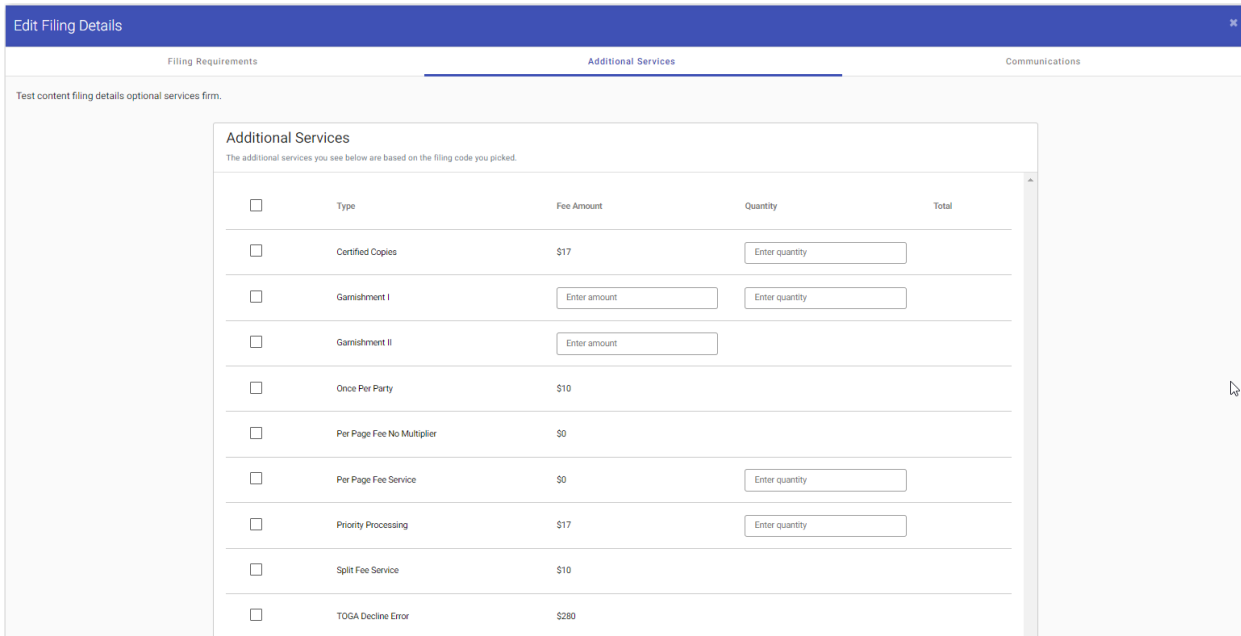
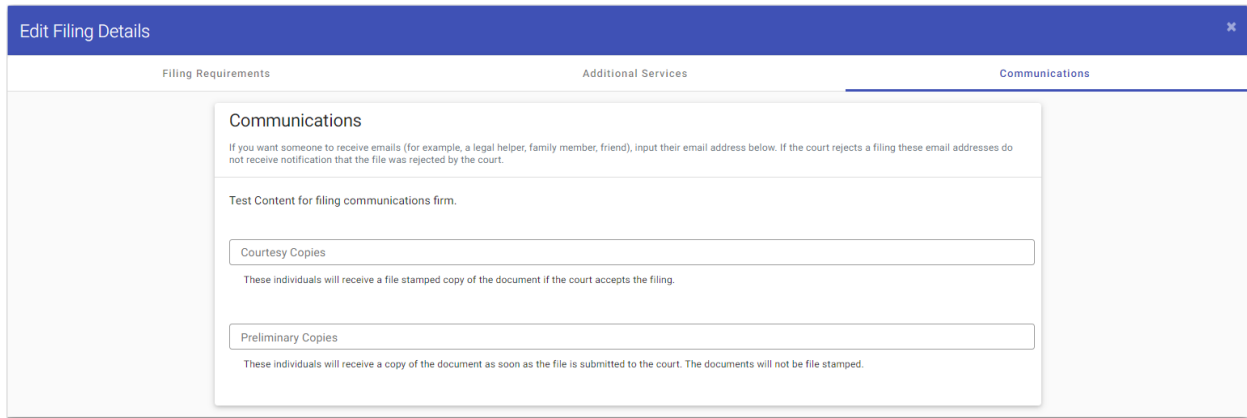


Figure 19.13 – Additional Services Pane on the Edit Filing Details Page

12. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

13. Click **Go to Communication**, or click **Communications** at the top of the page.

The Communications pane is displayed.



**Figure 19.14 – Communications Pane on the Edit Filing Details Page**

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

15. Click **Save**.

16. If you want to add another filing, on the *Filings* page, click **+ Add More**. Then, repeat the same steps for the next filing.

17. Click **Service →** to save your work and continue.

## Entering Payment Information for a Bulk Filing

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

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

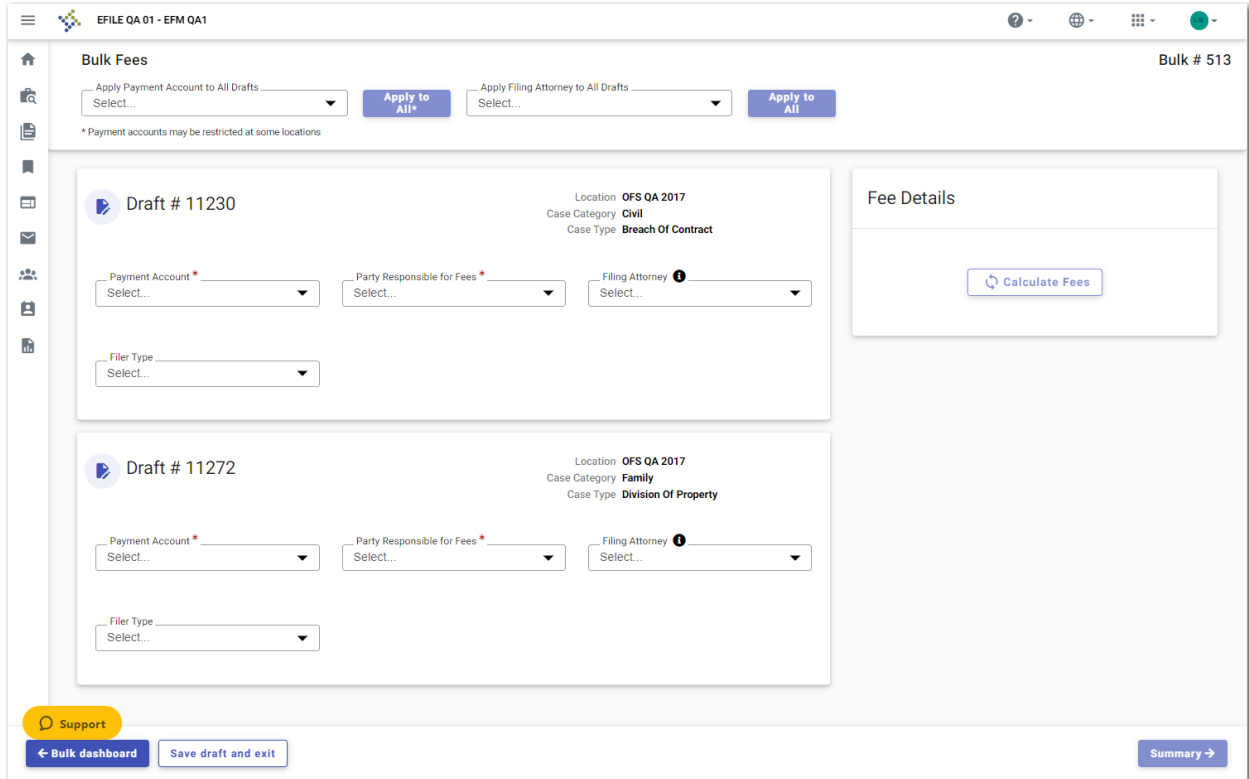




Figure 19.15 – Example of a Bulk Fees Page

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

To enter the payment information for your bulk filing:

**Note:** If you do not want to apply the same payment account and filing attorney to all of the drafts in the bulk, you must select the payment account and the filing attorney for each individual draft.

1. Select the payment account from the **Apply Payment Account to All Drafts** drop-down list. Then, click  to apply the selected payment account to all of the drafts in the bulk.


2. Select the filing attorney from the **Apply Filing Attorney to All Drafts** drop-down list. Then, click  to apply the selected filing attorney to all of the drafts in the bulk.

**Note:** All of the fields provided in the examples and steps listed here may not be displayed for all users.

3. For each draft, select the party responsible for fees from the **Party Responsible for Fees** drop-down list.

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

4. For each draft, select the filer type from the **Filer Type** drop-down list.

5. When all of the fields on the page have been completed, click .

**Bulk Fees** Bulk # 518 - Summer Bulk Filings

Apply Payment Account to All Drafts: Fee CC 01.04 Apply to All | Apply Filing Attorney to All Drafts: Peter Pan Apply to All

\* Payment accounts may be restricted at some locations

Draft #	Location	Case Category	Case Type	Party Responsible for Fees	Filing Attorney	Filing Fee	Total Service Fees	Convenience Fee	Total Court Service Fees	Grand Total
Draft # 11243	OFS QA 2017	Civil	Other Civil	Harrison Ford	Peter Pan	\$5.00	\$20.83	\$1.00	\$1.00	\$37.83
Draft # 11244	OFS QA 2017	Family	Other Family Law Matters	Maria Johnson	Peter Pan	\$5.00	\$20.83	\$1.00	\$1.00	\$32.83
Draft # 11251	OFS QA 2017	Civil	Negligence	Gerald Ford	Peter Pan	\$5.00	\$20.83	\$1.00	\$1.00	\$27.83

Buttons: Support, Bulk dashboard, Save draft and exit, Summary

Figure 19.16 – Example of a Bulk Fees Page with all Fields Completed

6. Click

## Viewing the Envelope Summary for a Bulk Filing

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

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

To view the envelope summary for a bulk filing:

1. Complete the required information on the *Case Information* page, the *Parties* page, the *Filings* page, and the *Bulk Fees* page.

2. After you have completed the fields on each page, from the *Bulk Fees* page, click

The *Bulk Summary* page is displayed.

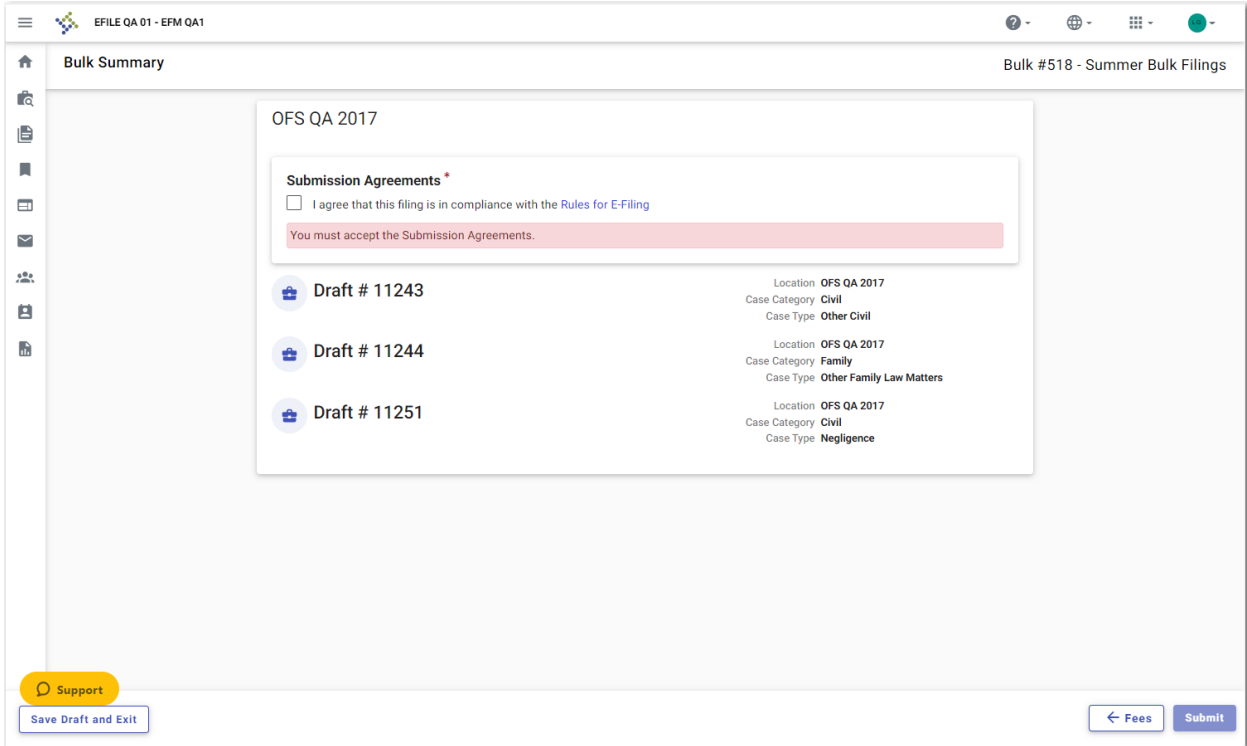


Figure 19.17 – Example of a Bulk Summary Page—Submission Agreements Not Accepted

3. If there are submission agreements for your bulk filing, select the appropriate check boxes for the submission agreements.
4. Review the summary of the bulk filing. After you are satisfied with the information in your bulk filing, click



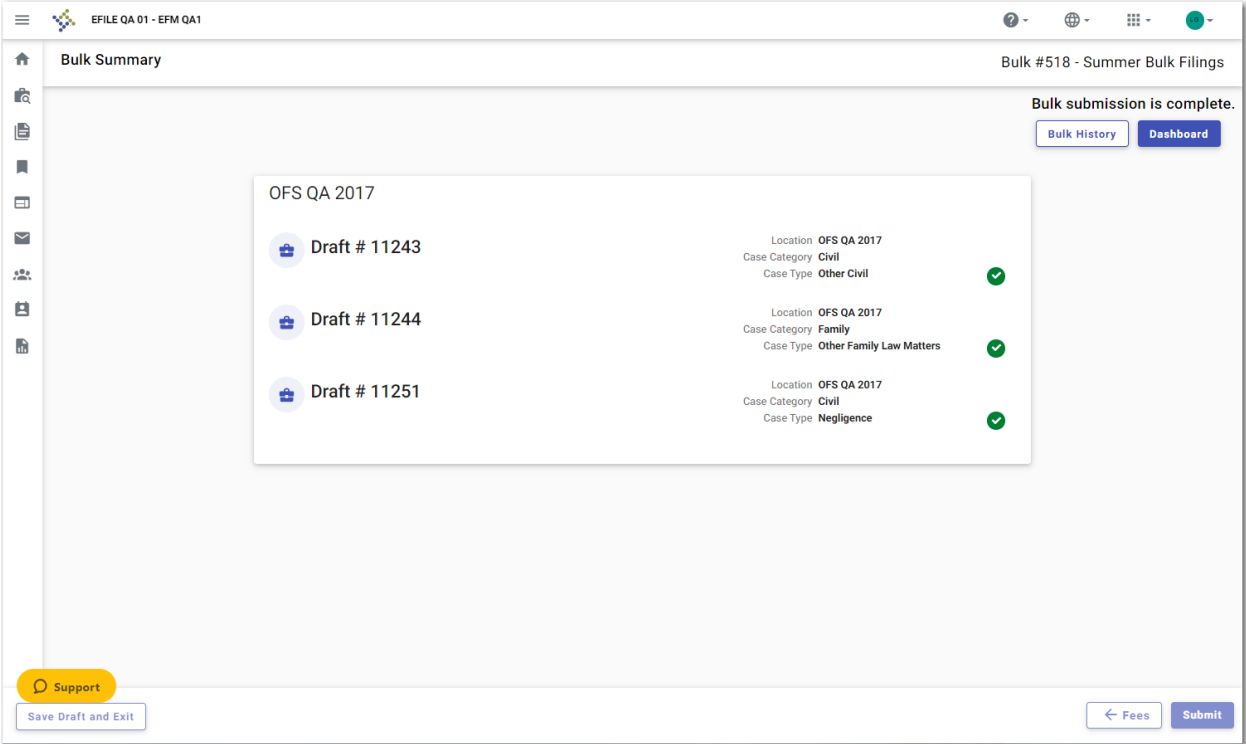


Figure 19.18 – Example of a Bulk Summary Page After Filing is Submitted

- 5. Click **Bulk History** to return to the *Bulk History* page, or click **Dashboard** to return to the *Dashboard* page.

## Associating Parties to a Bulk Filing

You can associate parties to a bulk filing.

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

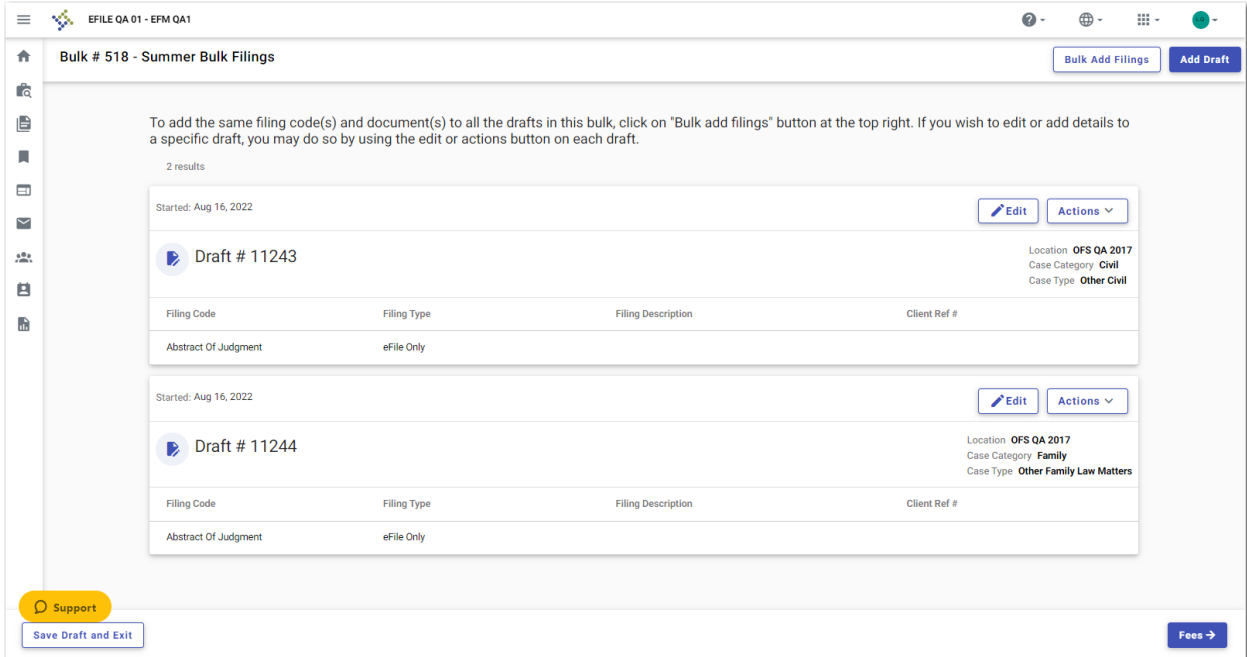



Figure 19.19 – Example of a Bulk Filing Dashboard Page

To associate parties to a bulk filing:

1. On the *Bulk Filing Dashboard* page, click  .  
The **Drafts** tab is displayed.



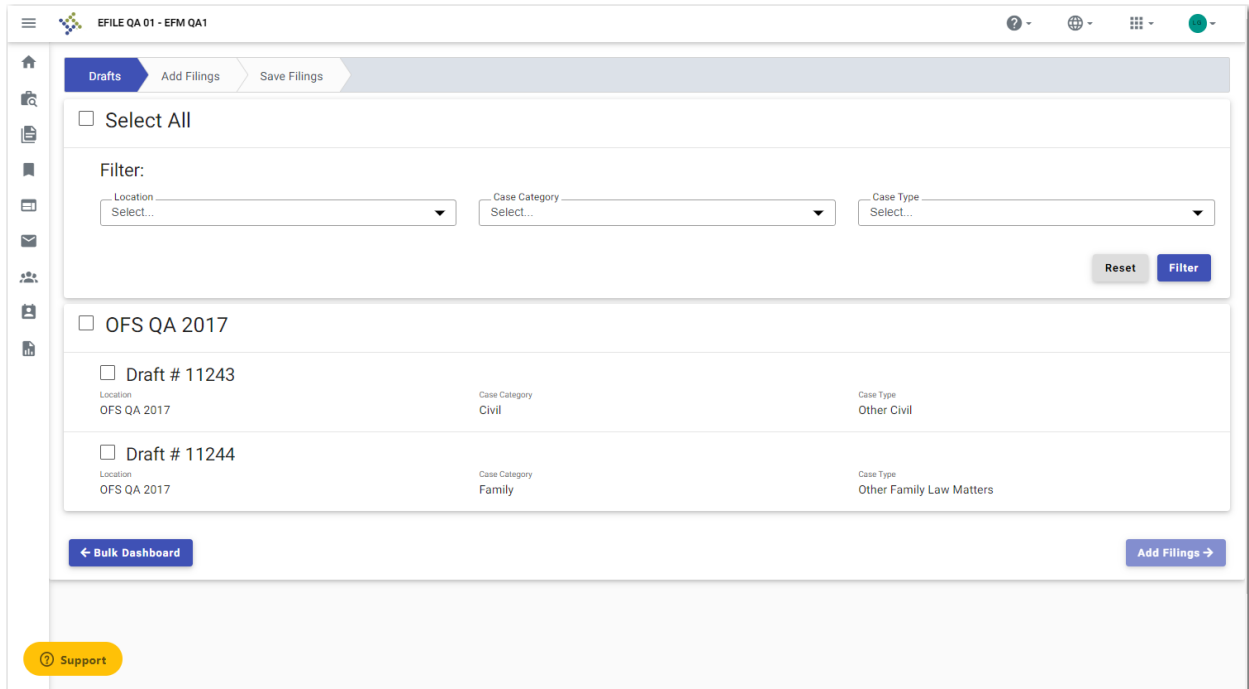




Figure 19.20 – Example of a Drafts Tab

2. On the **Drafts** tab, if you want to filter the drafts, select the location, case category, and case type from the drop-down lists. Then, click  .
3. Select the check boxes for the filings that you want to add to your selected drafts. If you want to add all of the filings, select the **Select All** check box.
4. Click  .  
The **Add Filings** tab is displayed.

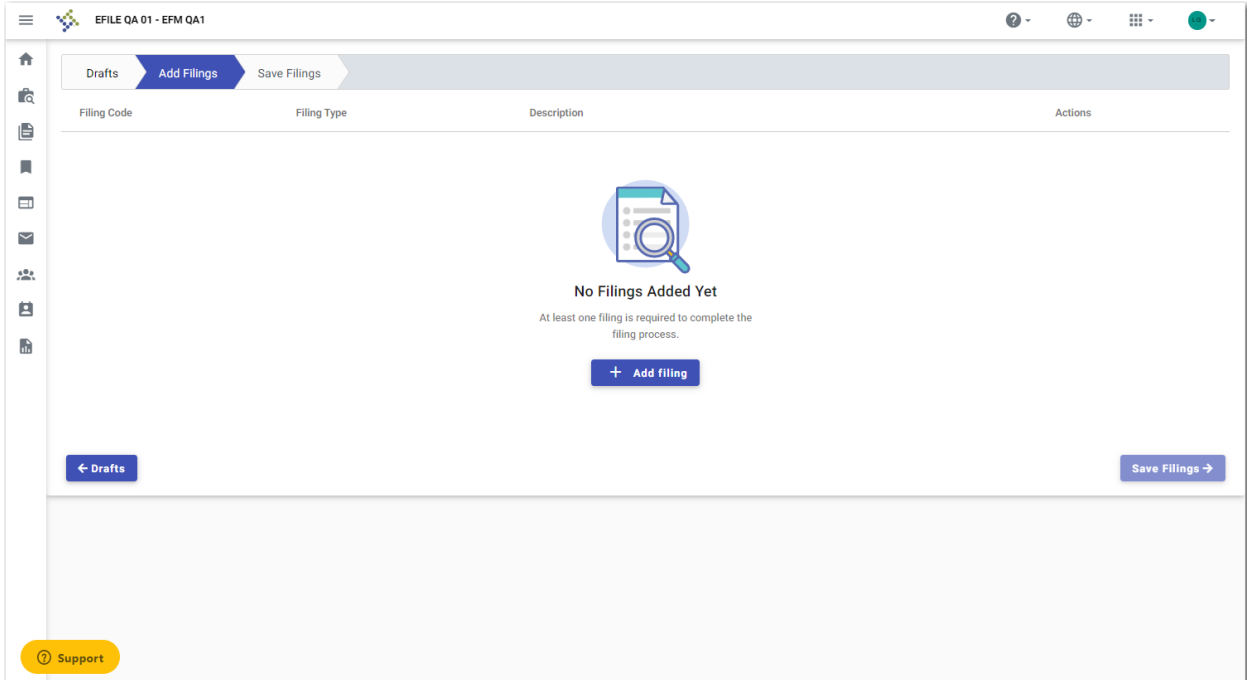
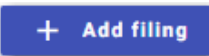
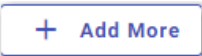
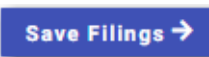



Figure 19.21 – Example of an Add Filings Tab—No Filings Added Yet

5. Click  .  
The *Edit Filing Details* page is displayed.
6. Complete the required fields.
7. If you want to add another filing, click  . Continue to click the button until all of the filings have been added.
8. Click  .  
The **Save Filings** tab is displayed.
9. On the **Save Filings** tab, click  .  
The **Associate Parties** button is displayed.

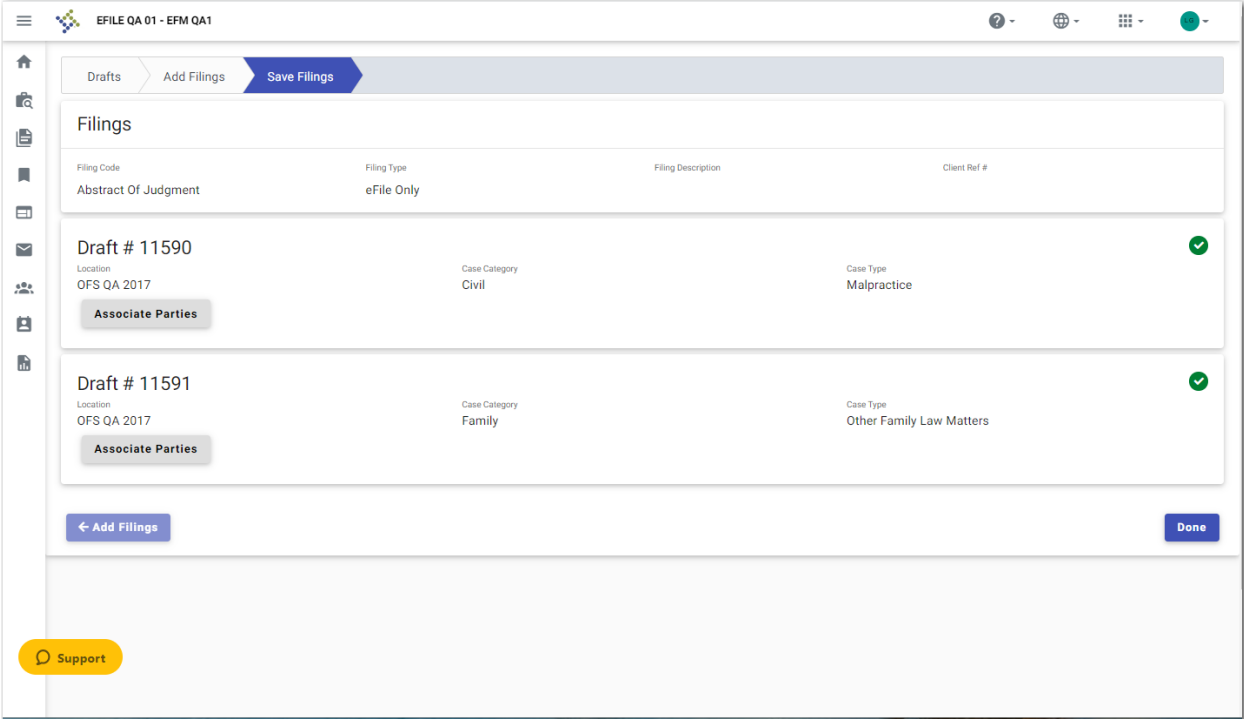


Figure 19.22 – Example of a Save Filings Tab

10. Click **Associate Parties**.

The Select Filings window is displayed.

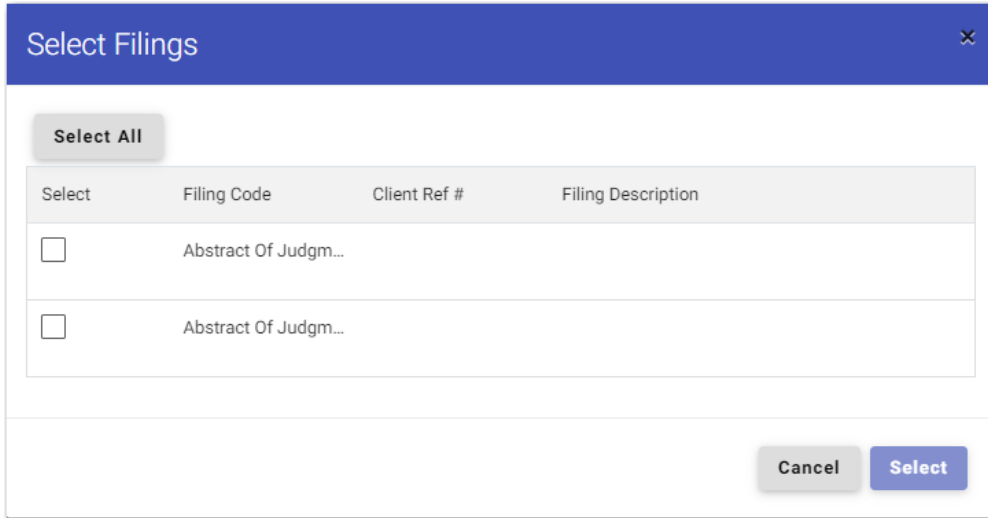


Figure 19.23 – Example of a Select Filings Window

11. Select the check boxes for the filings that you want to associate with a party, or click



Then, click



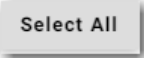
The *Associate Parties to selected Filing(s)* window is displayed.

Figure 19.24 – Example of the Associate Parties to Selected Filing(s) Window

**Note:** If you want to filter the parties to be associated with the filing, type the first and last name of the specified party; and select the party type from the Party Type drop-down list. Then, click



12. Select the check box for each filing that you want to associate with the added party, or click



13. Click  , and then click  on the **Save Filings** tab.

The parties are now associated with the specified bulk filing. The *Bulk Filing Dashboard* page is displayed with the bulk filing you just modified.

## Filing into a Bulk Filing That Contains Multiple Existing Cases

You can file into a bulk filing that already contains multiple existing cases.

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

To file into a bulk filing that already contains multiple existing cases:

1. On the *Dashboard* page, click .

The *Start Filing* page is displayed.

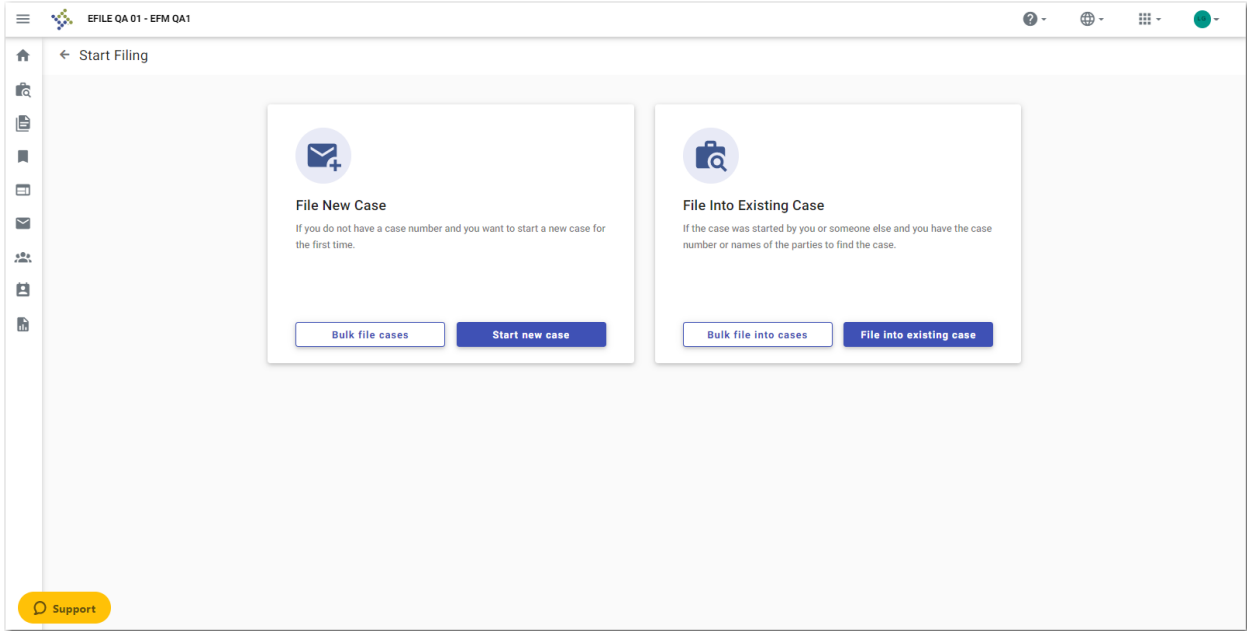


Figure 19.25 – Start Filing Page

2. Click  .  
The *Bulk Filing* window is displayed.

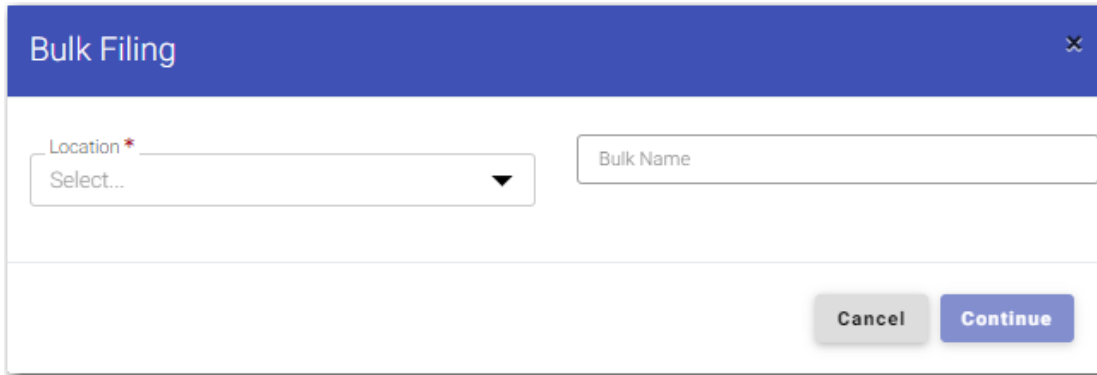



Figure 19.26 – Bulk Filing Window

3. Select the location from the **Location** drop-down list.
4. Type the name of the bulk filing that you want to file into, and then click  .  
The *File into Multiple Cases* page is displayed.

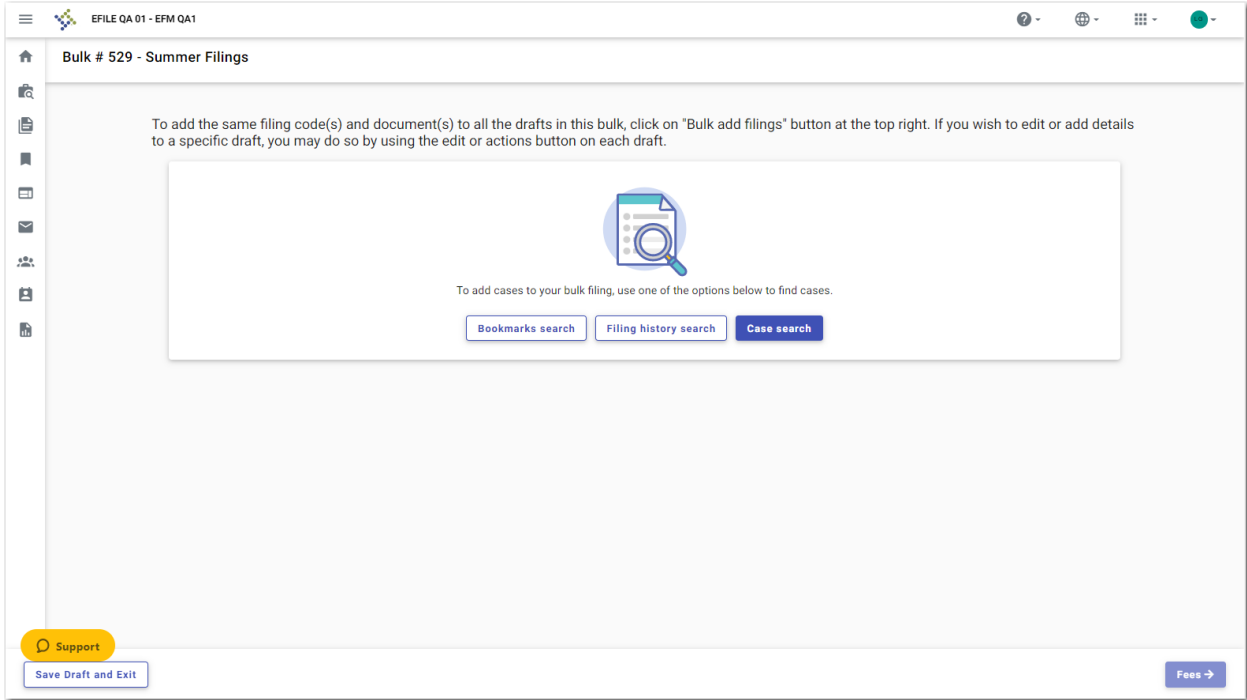


Figure 19.27 – Example of a File into Multiple Cases Page

5. Select the method by which you want to search for the cases that you want to add to your bulk filing.

The methods are:

- Bookmarks search
- Filing history search
- Case search

6. Click the button for the method you selected, and then follow the prompts for that method.

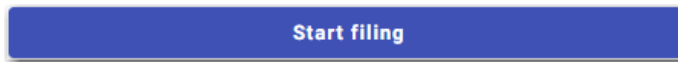
## Filing into Multiple Existing Cases by Using the Bookmarks Search

You can file into a bulk filing that you have bookmarked and that already contains multiple existing cases.

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

To file into multiple existing cases by using the Bookmarks search:

1. On the *Dashboard* page, click



The *Start Filing* page is displayed.

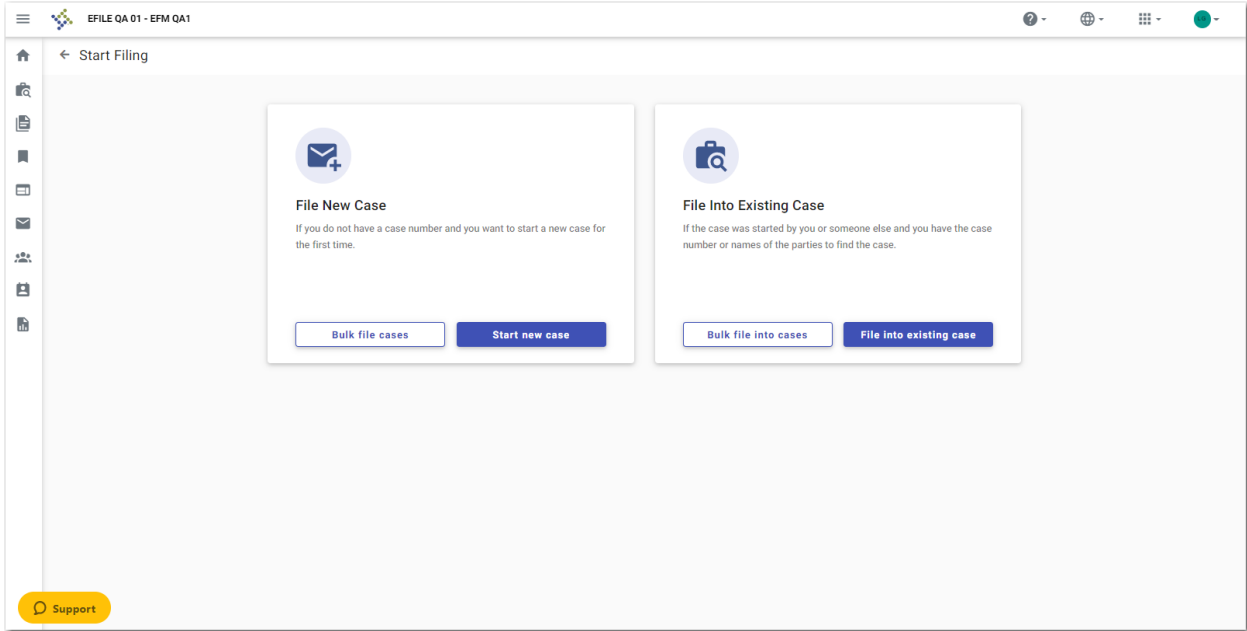


Figure 19.28 – Start Filing Page

2. Click  .  
The *Bulk Filing* window is displayed.

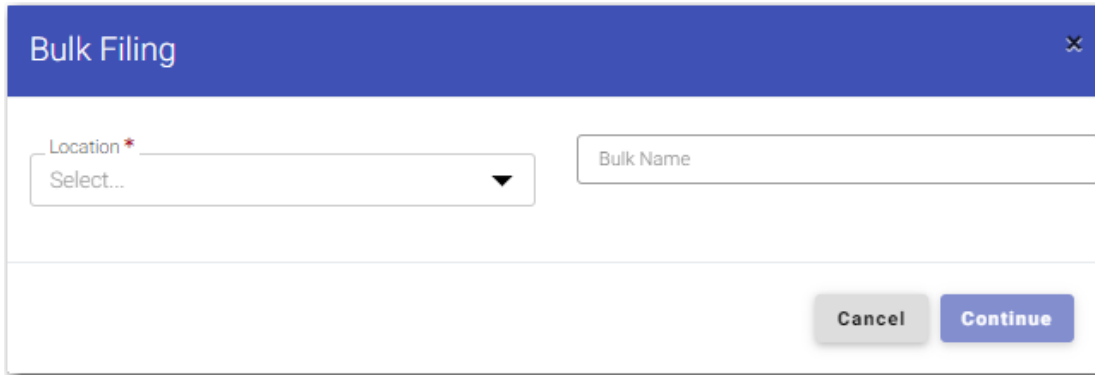



Figure 19.29 – Bulk Filing Window

3. Select the location from the **Location** drop-down list.
4. Type the name of the bulk filing that you want to file into, and then click  .  
The *File into Multiple Cases* page is displayed.



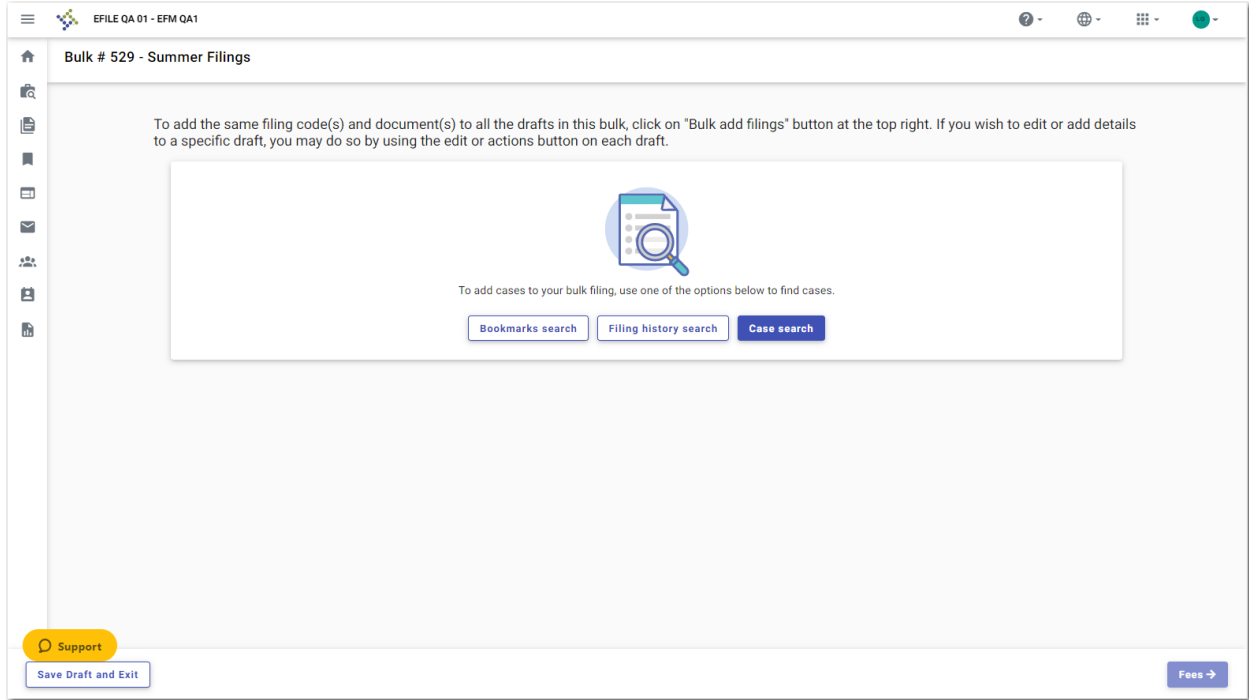



Figure 19.30 – Example of a File into Multiple Cases Page

5. Click .

The *Bookmarks* page is displayed. If previous bulk filings were bookmarked, they are displayed on the page.

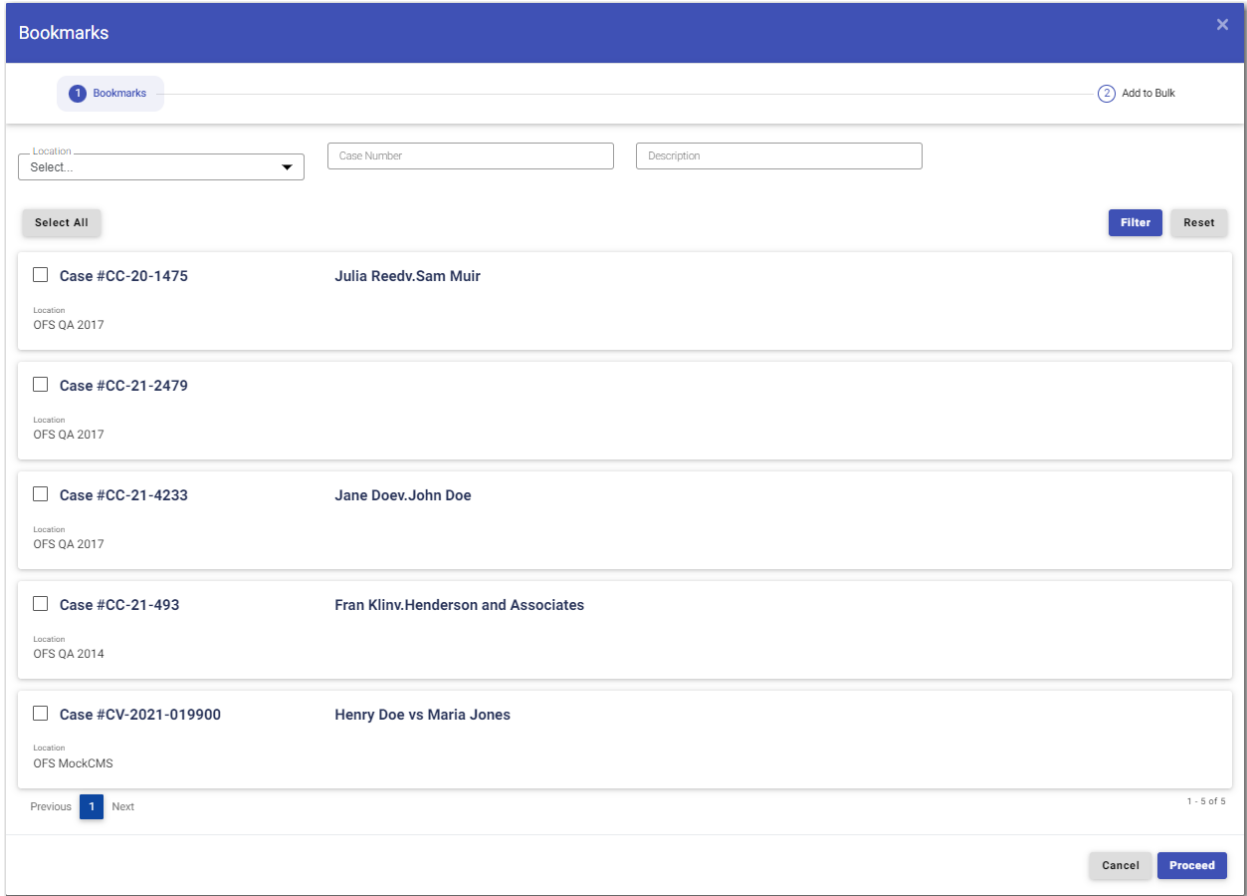



Figure 19.31 – Example of a Bookmarks Page

6. Select the bulk filing that you want to file into, and then click .

**Note:** If your bulk filing is not displayed on the *Bookmarks* page, you can search for the bulk filing that you want. Select the location from the Location drop-down list, and then type the case

number in the Case Number field. Then, click .

The *Add to Bulk* window is displayed.

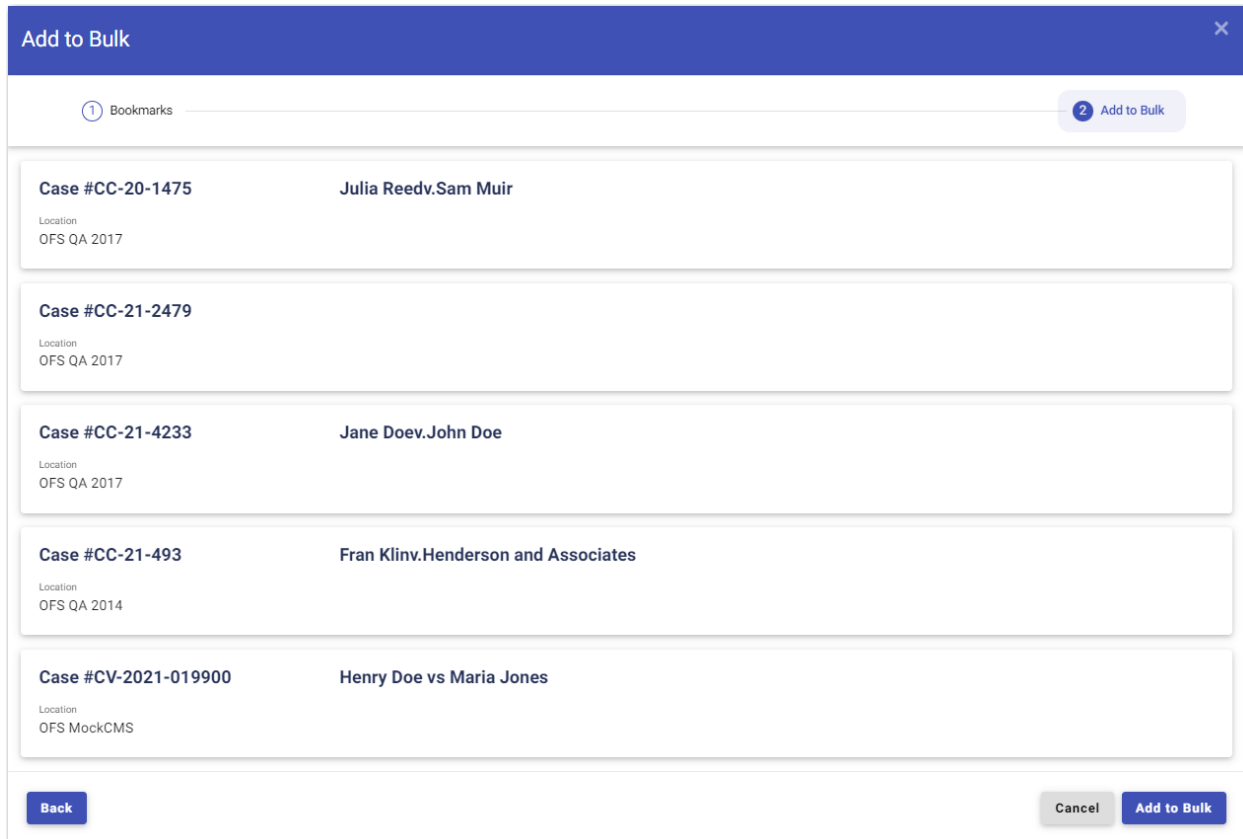


Figure 19.32 – Example of an Add to Bulk Window

- Click **Add to Bulk**, and then click **Done**.

The cases you selected are added to the bulk filing and are displayed on the *Bulk Filing Dashboard* page.

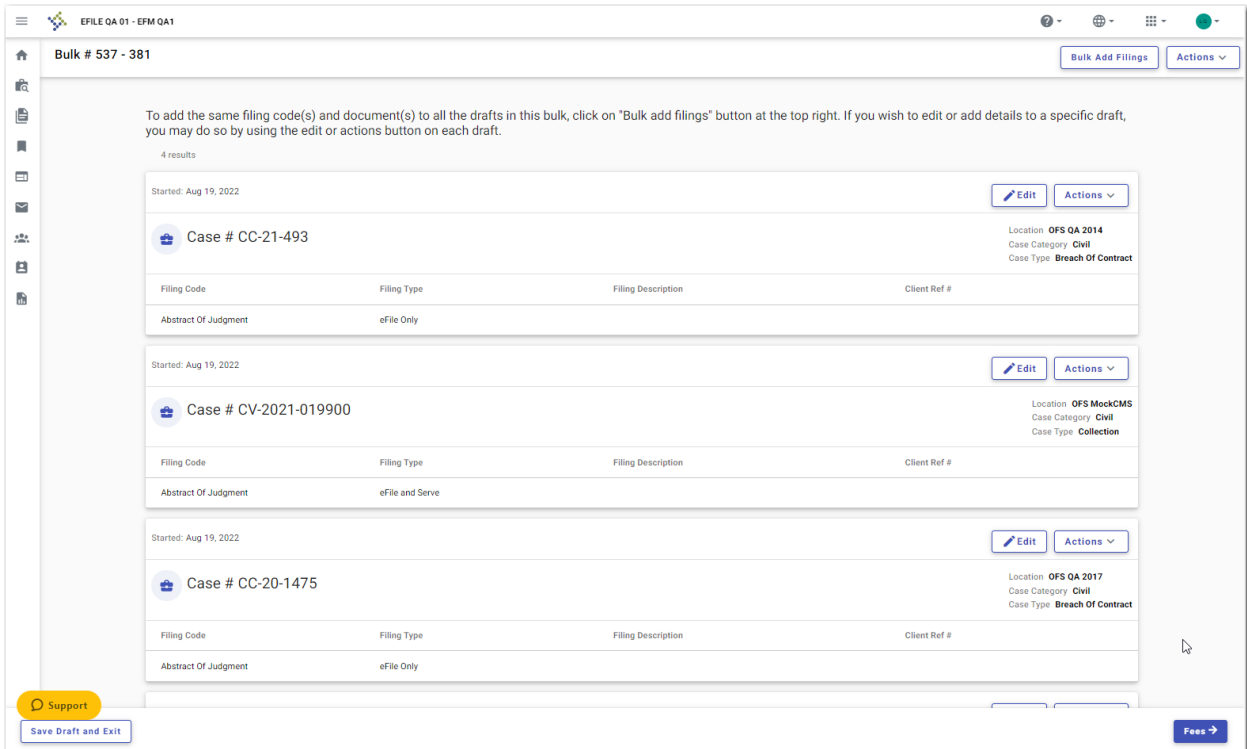


Figure 19.33 – Example of a Bulk Filing Dashboard Page with Additional Cases Added

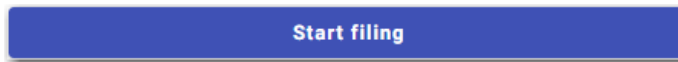
## Filing into Multiple Existing Cases by Using a Case Search

You can file into a bulk filing that already contains multiple existing cases from the *Search for Case* page.

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

To file into multiple existing cases by using a case search:

1. On the *Dashboard* page, click



The *Start Filing* page is displayed.

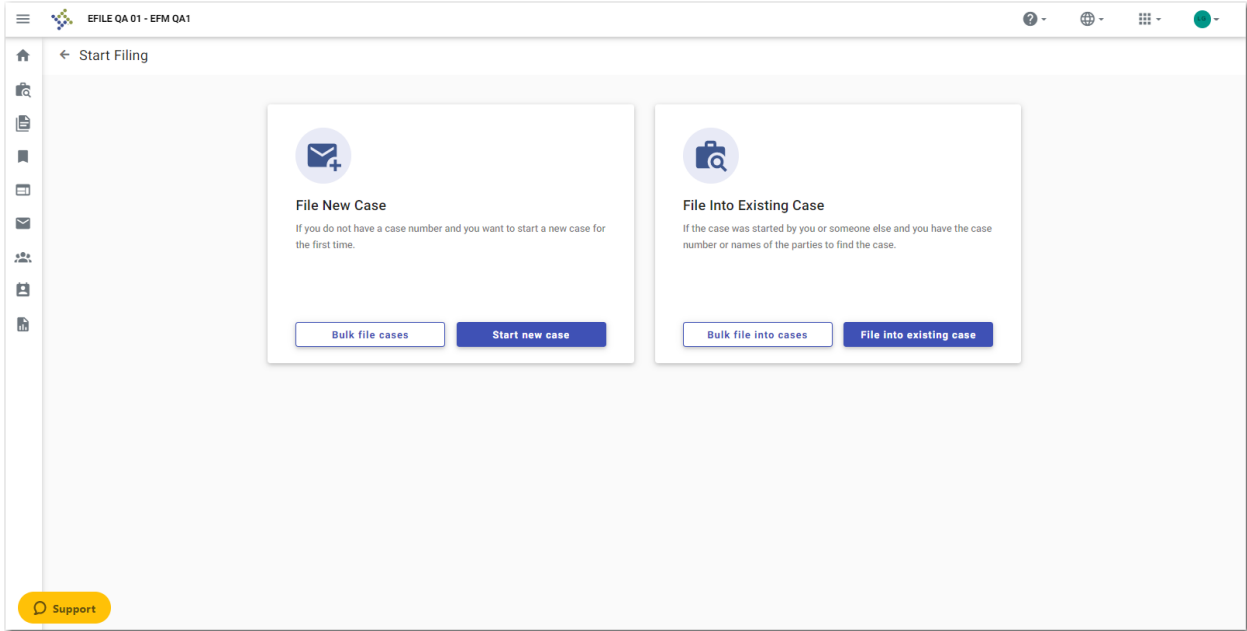


Figure 19.34 – Start Filing Page

2. Click  .  
The *Bulk Filing* window is displayed.

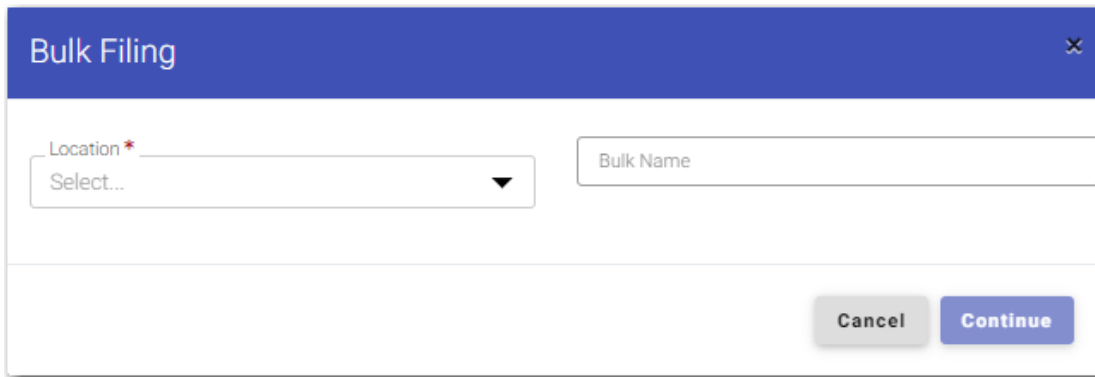



Figure 19.35 – Bulk Filing Window

3. Select the location from the **Location** drop-down list.
4. Type the name of the bulk filing that you want to file into, and then click  .  
The *Bulk Filing Dashboard* page is displayed.

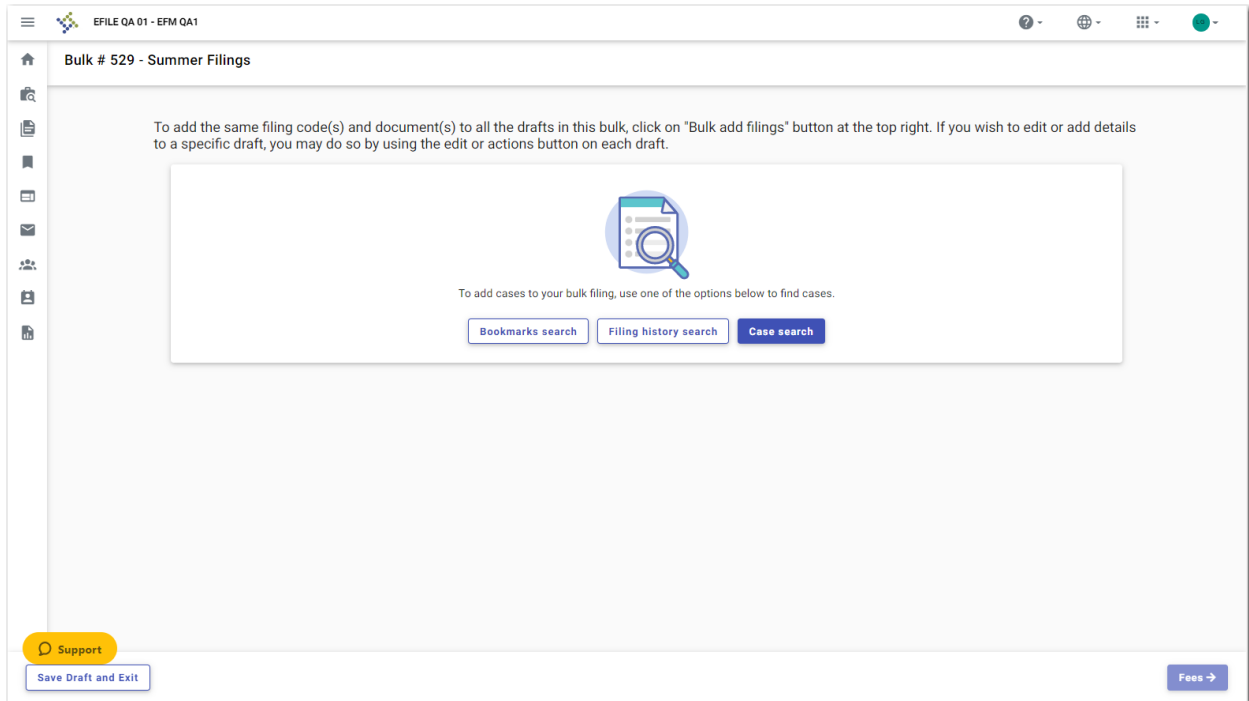



Figure 19.36 – Example of a Bulk Filing Dashboard Page

5. Click **Case search**.

The *Search for Case* page is displayed.

Search for Case

1 Search for Case 2 Case Search Results 3 Add to Bulk

 Search for Case

If you are not sure your case number is correct, refer to the formatting instructions for the selected court or search for the case by party name.

Location\*  
OFS QA 2017

<https://www.hcdistrictclerk.com/Common/Civil/EFiling.aspx>

Search for Case by

Case Number  Party Name

Click here to access Harris County Court Website. Family Information Form is available here.


Case Number\*

Sort results by  
Newest to Oldest

Cancel Search

Figure 19.37 – Search for Case Page

6. Select the location of the case that you want to find from the **Location** drop-down list.

7. Type the number for the case that you want to find, and then click  .

The *Case Search Results* window is displayed.

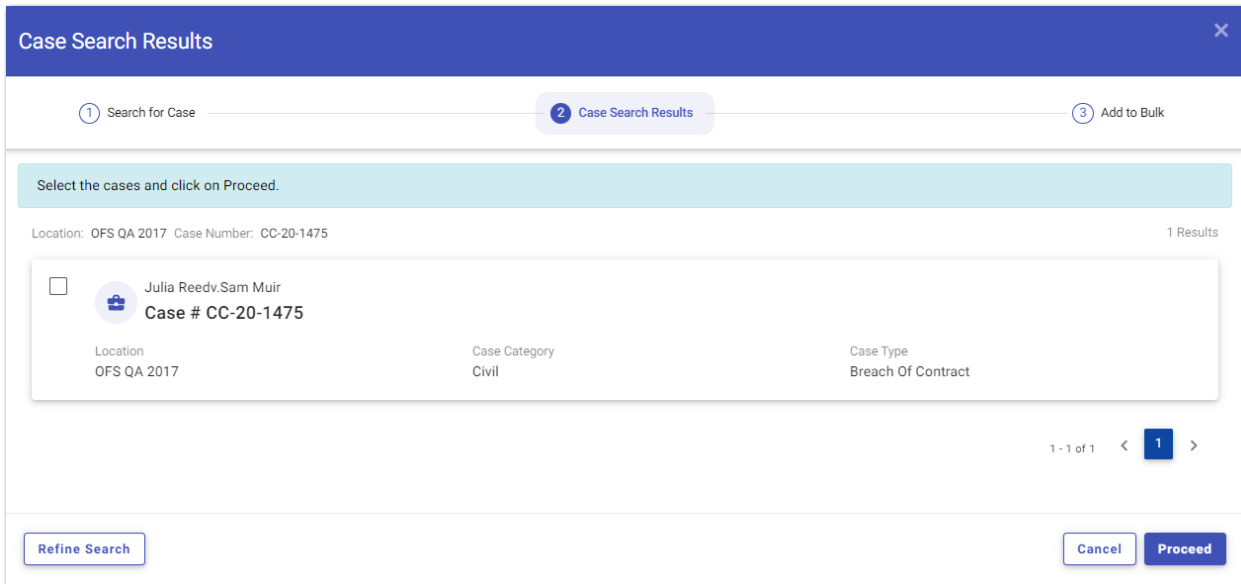


Figure 19.38 – Example of a Case Search Results Window

8. If the case is the one that you want to add to the bulk filing, select the check box, and then click

**Proceed**

The *Add to Bulk* window is displayed.

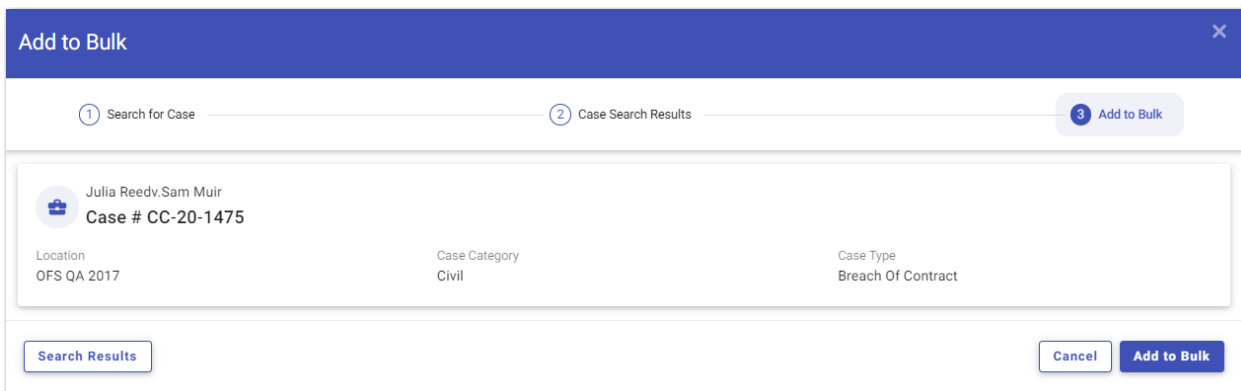


Figure 19.39 – Add to Bulk Window

**Refine Search**

**Note:** If the case that results from the search is not correct, click **Refine Search**. Then search for your case again.

**Note:** If you do not click any cases in the *Case Search Results* window, you cannot proceed.

9. If the case that results from your search is correct and you selected the check box for that case, click

**Add to Bulk**

**Done**

, and then click **Done**.

The case you selected is added to the bulk filing and is displayed on the *Bulk Filing Dashboard* page.



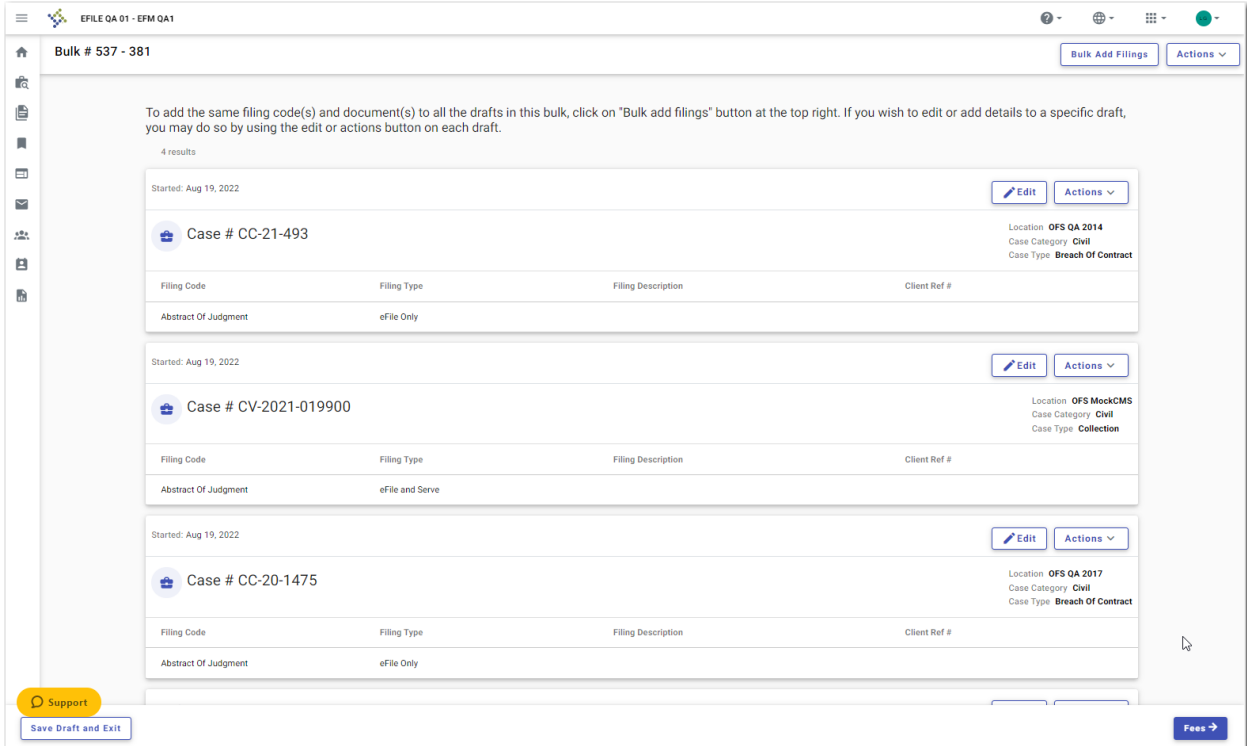


Figure 19.40 – Example of a Bulk Filing Dashboard Page with Additional Cases Added

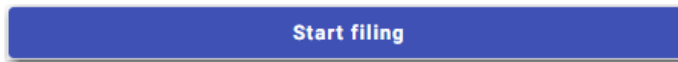
## Filing into Multiple Existing Cases by Using a Filing History Search

You can file into a bulk filing by using a Filing History search.

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

To file into multiple existing cases by using a Filing History search:

1. On the *Dashboard* page, click



The *Start Filing* page is displayed.

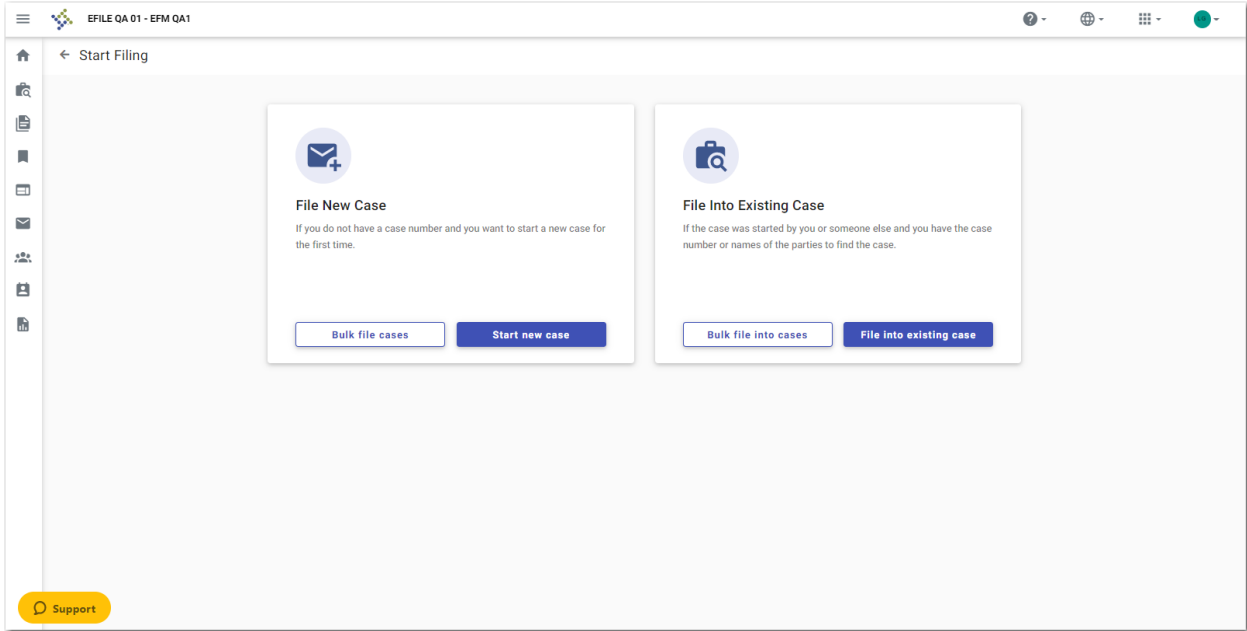


Figure 19.41 – Start Filing Page

2. Click  .  
The *Bulk Filing* window is displayed.

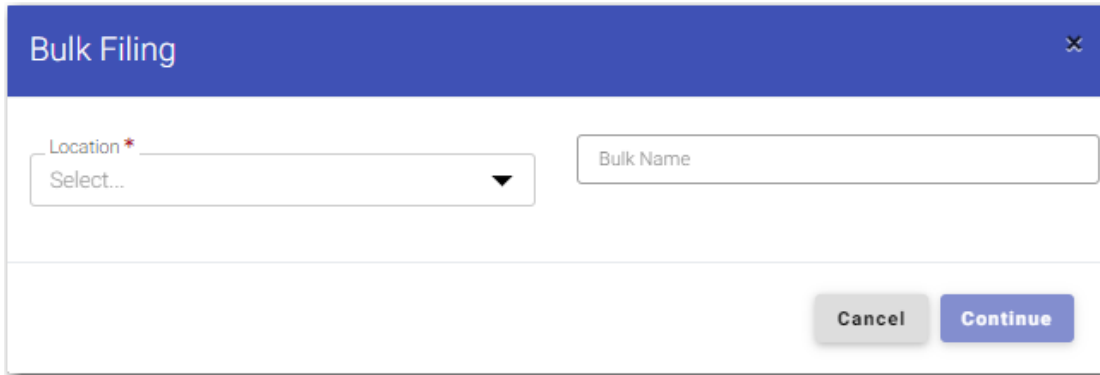



Figure 19.42 – Bulk Filing Window

3. Select the location from the **Location** drop-down list.
4. Type the name of the bulk filing that you want to file into, and then click  .  
The *Bulk Filing Dashboard* page is displayed.

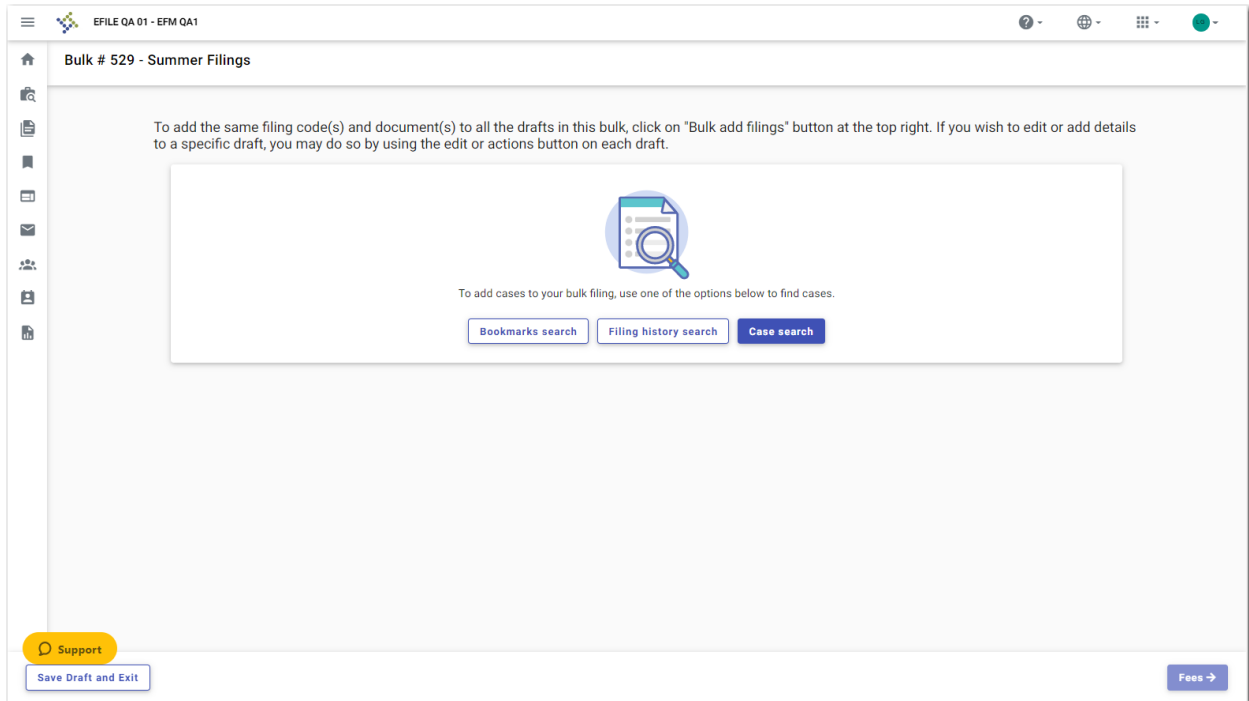


Figure 19.43 – Example of a Bulk Filing Dashboard Page

5. Click Filing history search.

The *Filing History* page is displayed.

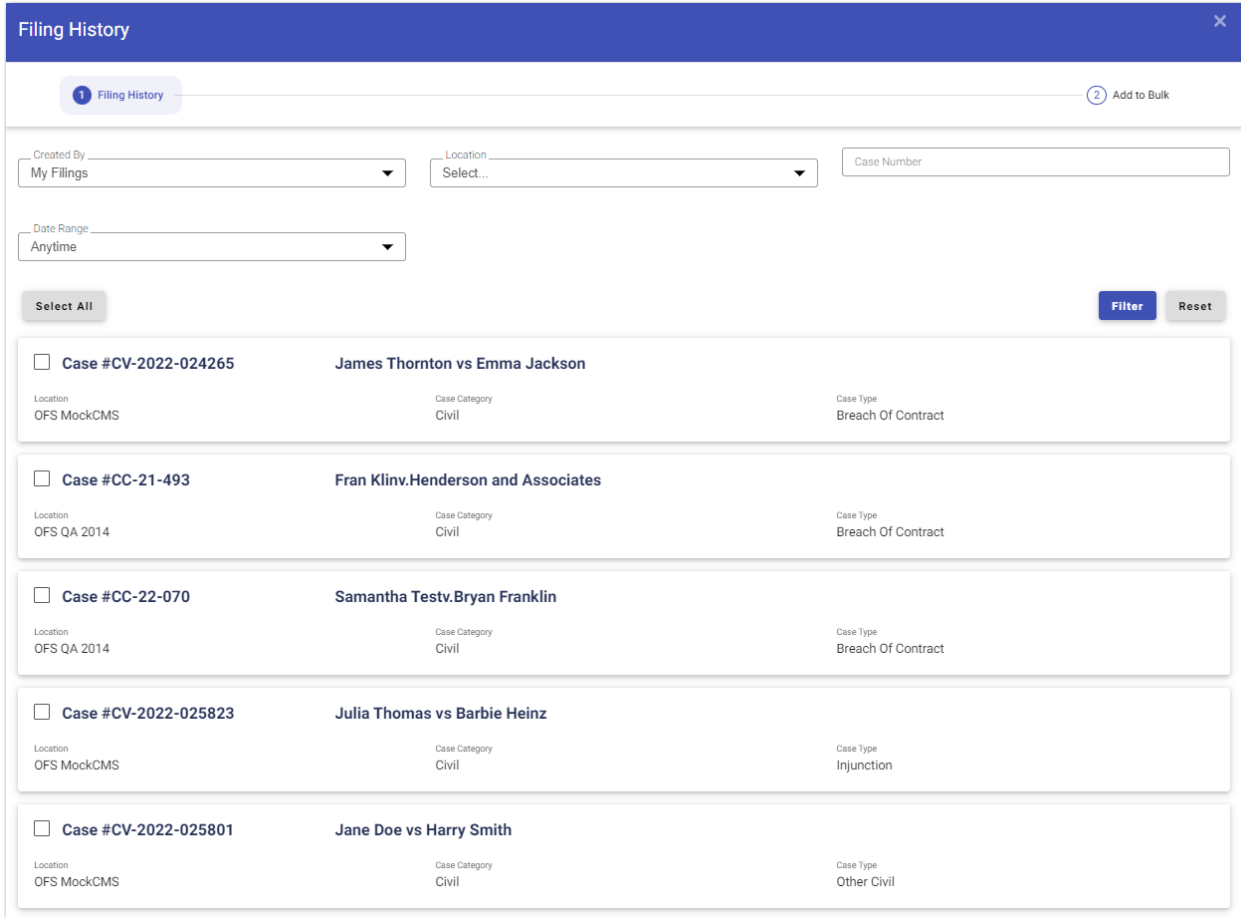


Figure 19.44 – Example of a Filing History Page

6. Select the bulk filing that you want to file into, and then click **Proceed**.

**Note:** If your bulk filing is not displayed on the *Filing History* page, you can search for the bulk filing that you want. First, select the filings that you want to be displayed (your filings or the firm’s filings) from the *Created By* drop-down list. Then, select the location from the *Location* drop-down list. Next, type the case number in the *Case Number* field, and then select the date

range for the filings that you want to be displayed. Then, click **Filter**.

The *Add to Bulk* window is displayed.

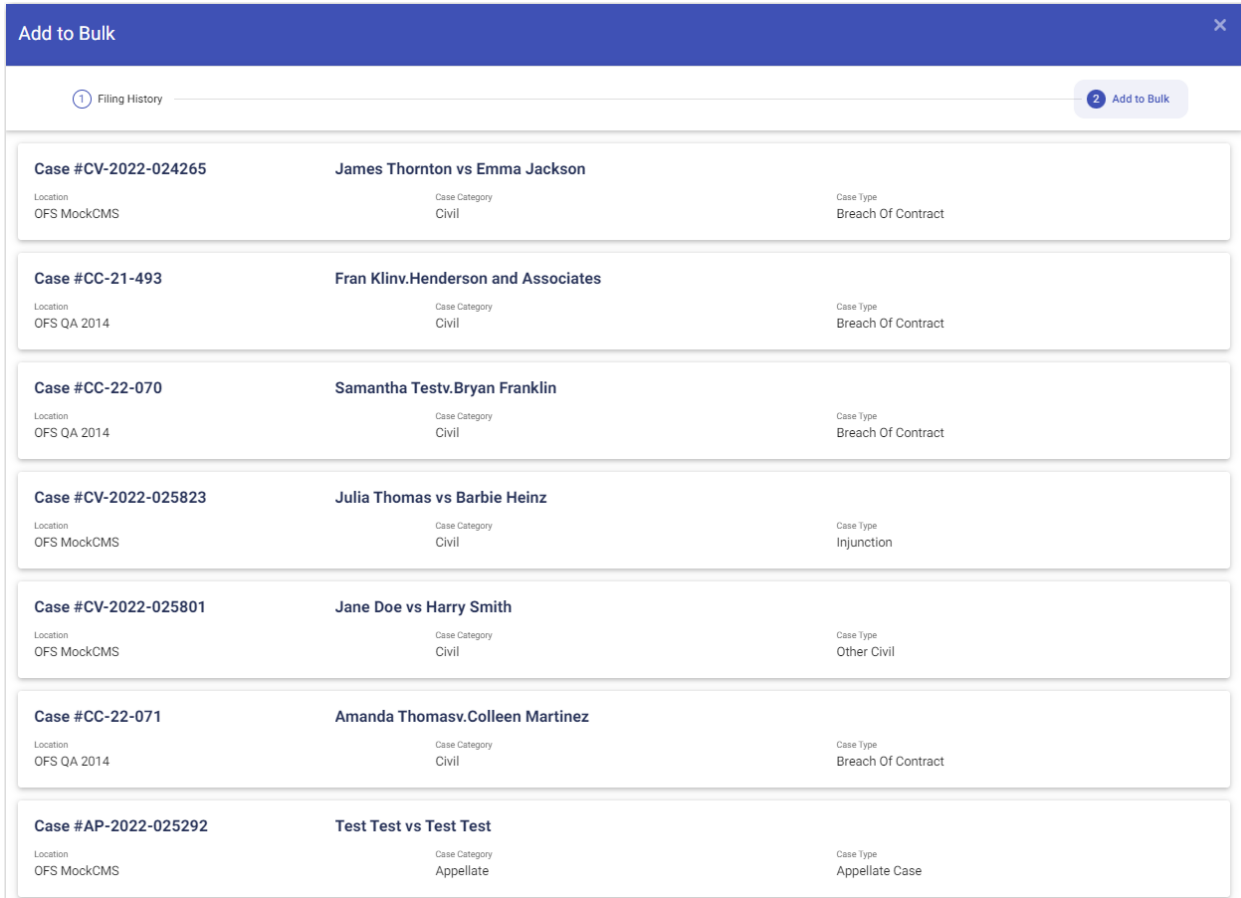


Figure 19.45 – Example of an Add to Bulk Window

7. Click **Add to Bulk**, and then click **Done**.

The case you selected is added to the bulk filing and is displayed on the *Bulk Filing Dashboard* page.

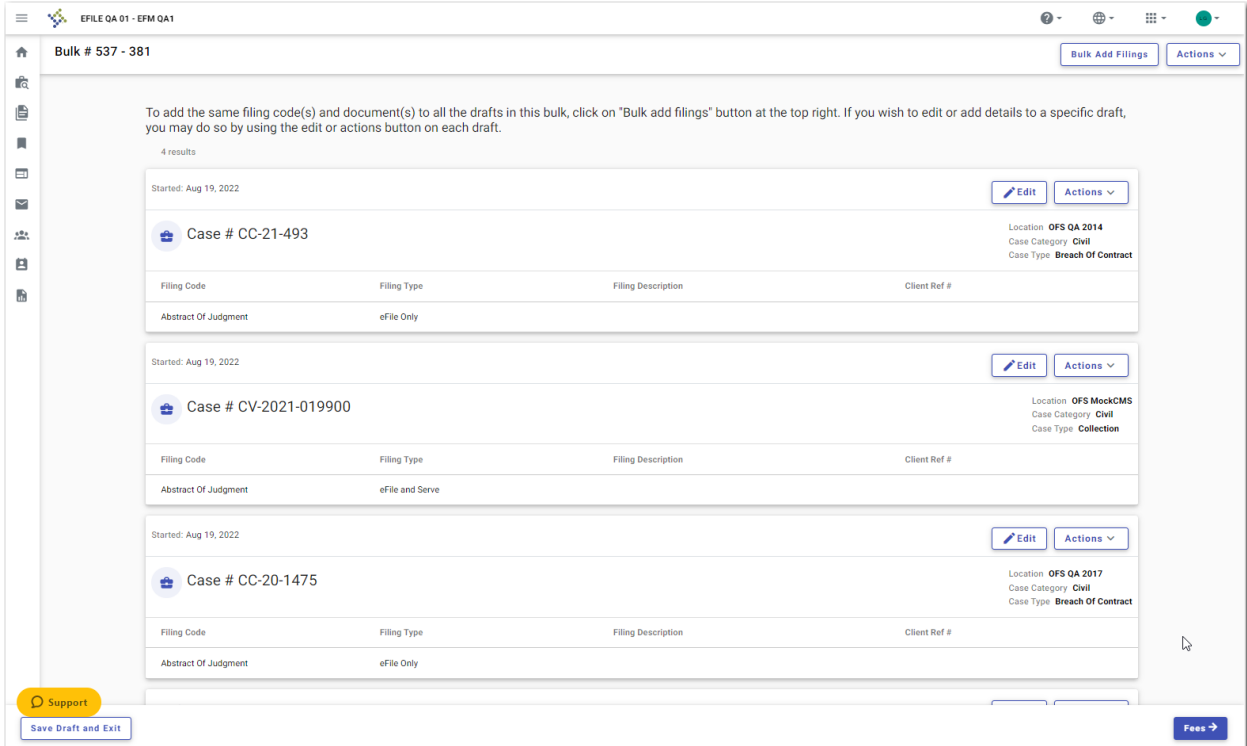


Figure 19.46 – Example of a Bulk Filing Dashboard Page with Additional Cases Added

## Copying a Bulk Filing

You can copy a bulk filing if one or more envelopes in the bulk filing failed to be submitted successfully.

To copy a bulk filing:

1. Navigate to the *Bulk History* page.

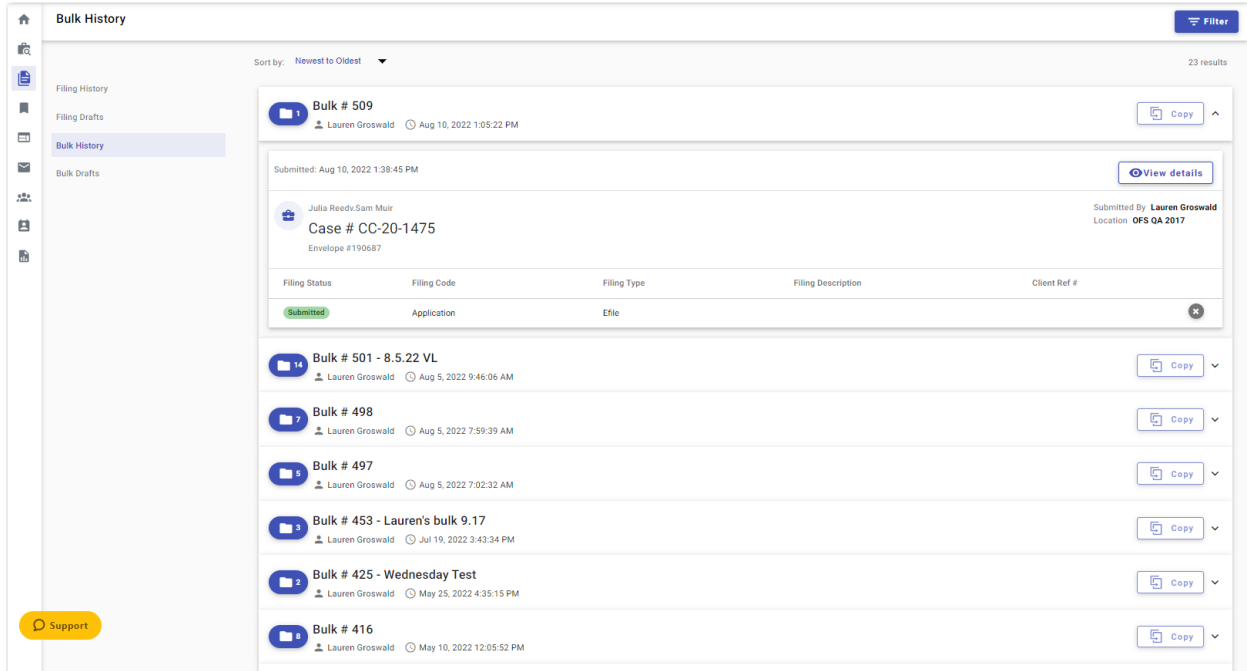


Figure 19.47 – Example of a Bulk History Page

2. Locate the bulk filing that you want to copy.

3. Click  .

**Note: The Copy button is only enabled when an envelope can be copied.**

The filing that you copied is displayed on the *Bulk Filing Dashboard* page.

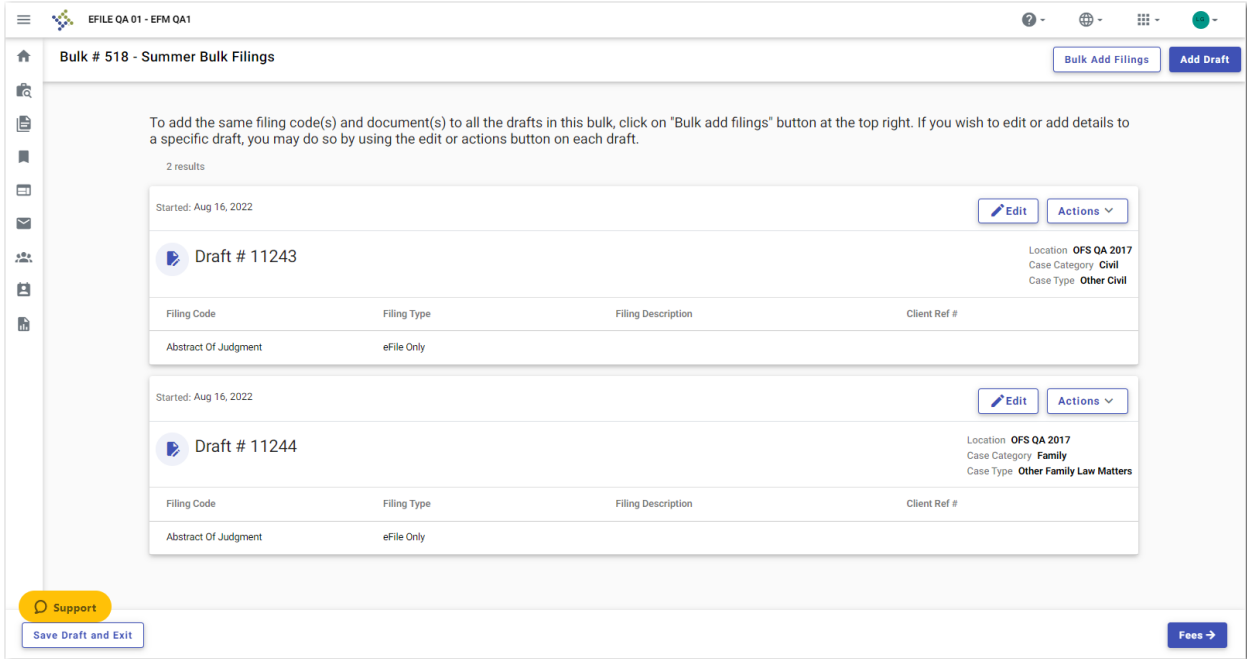


Figure 19.48 – Example of a Bulk Filing Dashboard

4. Continue with your filing.



# 20 Vacation Letter (or Leave of Absence)

## Topics covered in this chapter

- ◆ Dashboard
- ◆ Filing a Vacation Letter (or Leave of Absence)
- ◆ Correcting an Error in a Vacation Letter Filing
- ◆ Entering Payment Information for a Vacation Letter (or Leave of Absence) Filing

You can create a filing in which you upload a vacation letter (or leave of absence). The letter can be attached to all of the selected cases that you designate.

**Note:** Your configuration may include different verbiage in place of “vacation letter.”

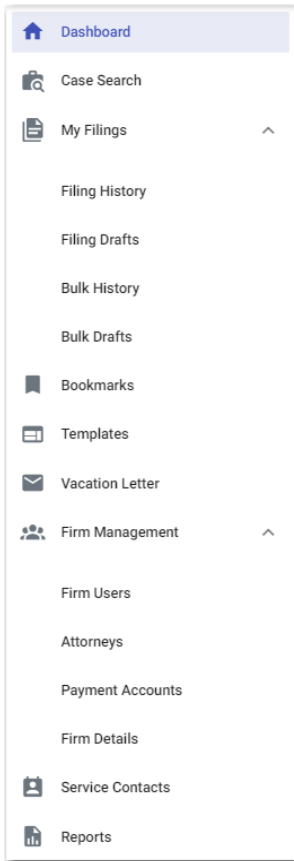
**Note:** The Vacation Letter feature is configured by Tyler and may not be available on your system.

After you submit a vacation letter filing, it is listed on the *Bulk History* page.


You can also save the vacation letter filing as a draft if you want to complete the filing at a later date. Draft vacation letter filings are listed on the *Bulk Drafts* page.

## Dashboard

The Dashboard provides a drop-down list for Firm Administrator actions.



**Figure 20.1 – Example of a Dashboard**

On the *Dashboard* page, click the Dashboard icon (  ) to view the Dashboard. The icon is a toggle, so you can click it again to hide the Dashboard. When the Dashboard is hidden, only the icons for each option are displayed.

From the Dashboard, you can perform the following additional actions for vacation letter:

- Access the *Dashboard* page to file a vacation letter (or leave of absence).
- Access the *File Vacation Letter* page to create a filing in which you upload a vacation letter (or leave of absence).

For information regarding the other options displayed on the Dashboard, refer to [Dashboard, page 34](#).

## Bulk History

The *Bulk History* page includes the filing history for your and your firm's vacation letter (or leave of absence) filings.

From the Dashboard menu, click **Bulk History**. From here, you can view a history of your and your firm's vacation letter (or leave of absence) filings.

**Bulk History** Filter

Sort by: **Newest to Oldest** 23 results

**Bulk # 509**  
 Submitted: Aug 10, 2022 1:05:22 PM Copy

Submitted: Aug 10, 2022 1:38:45 PM View details

Submitted By: **Lauren Groswald**  
 Location: **OFS QA 2017**

**Julia Reedx Sam Muir**  
**Case # CC-20-1475**  
 Envelope #190687

Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #
Submitted	Application	Efile		

**Bulk # 501 - 8.5.22 VL** Copy  
 Submitted: Aug 5, 2022 9:46:06 AM

**Bulk # 498** Copy  
 Submitted: Aug 5, 2022 7:59:39 AM

**Bulk # 497** Copy  
 Submitted: Aug 5, 2022 7:02:32 AM

**Bulk # 453 - Lauren's bulk 9.17** Copy  
 Submitted: Jul 19, 2022 3:43:34 PM

**Bulk # 425 - Wednesday Test** Copy  
 Submitted: May 25, 2022 4:35:15 PM

**Bulk # 416** Copy  
 Submitted: May 10, 2022 12:05:52 PM

[Support](#)

Figure 20.2 – Example of a Bulk History Page

## Bulk Drafts

The *Bulk Drafts* page includes the drafts of your and your firm’s vacation letter (or leave of absence) filings.

On the Dashboard menu, click **Bulk Drafts**. From here, you can view a list of your and your firm’s vacation letter (or leave of absence) draft filings, resume a draft filing, or delete a draft filing.

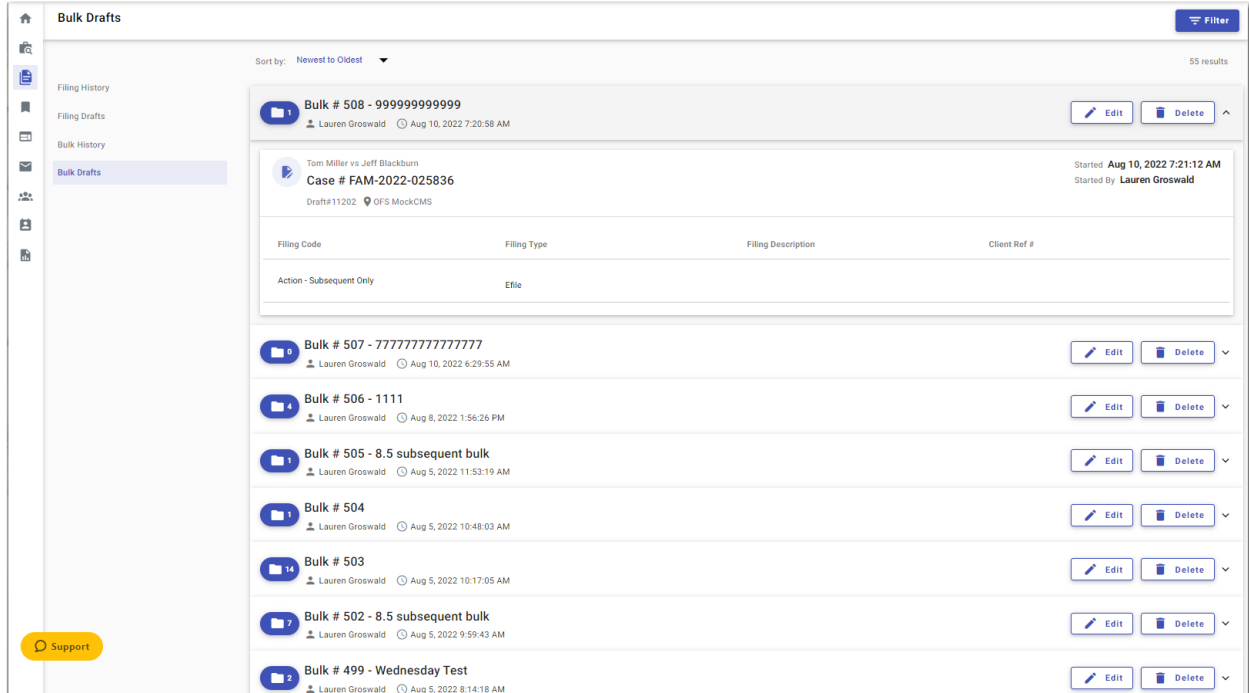


Figure 20.3 – Example of a Bulk Drafts Page

## Filing a Vacation Letter (or Leave of Absence)

You can start a vacation letter (or leave of absence) filing from both the Dashboard menu and the *Dashboard* page.

**Note:** Your configuration may include different verbiage in place of “vacation letter.”

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

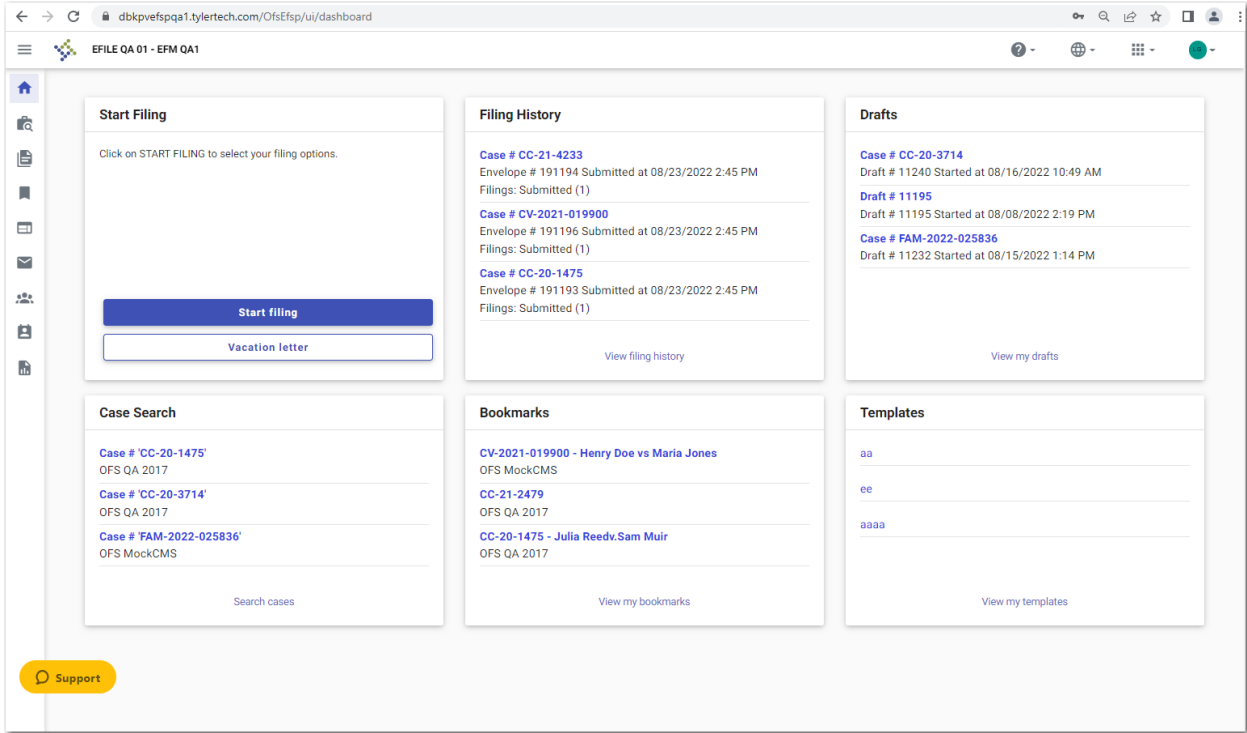


Figure 20.4 – Example of a Dashboard Page

To file a vacation letter:

1. From the Dashboard menu, click **Vacation Letter** or click



on the *Dashboard* page.

The **Options** tab on the *File Vacation Letter* page is displayed.

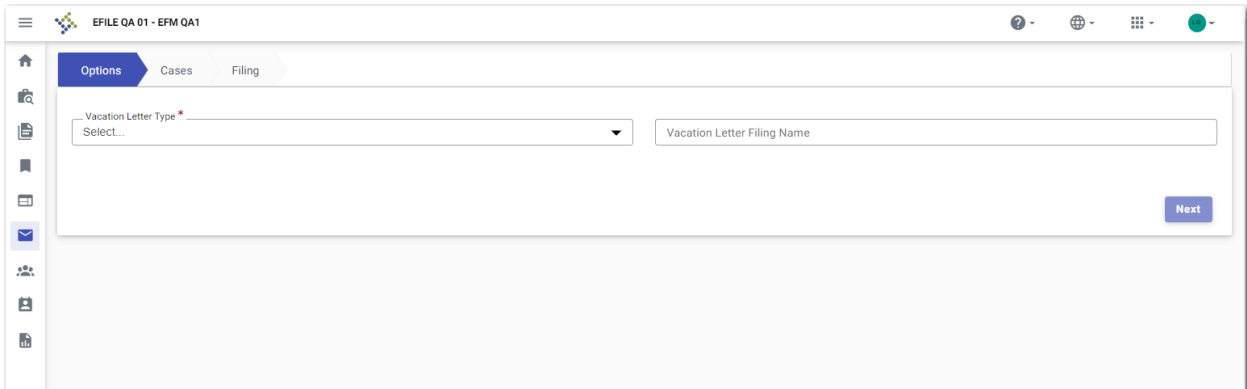


Figure 20.5 – Options Tab on the File Vacation Letter Page

2. From the **Vacation Letter Type** drop-down list, select the vacation letter type that you want.
3. Type a name for the vacation letter filing in the **Vacation Letter Filing Name** field.

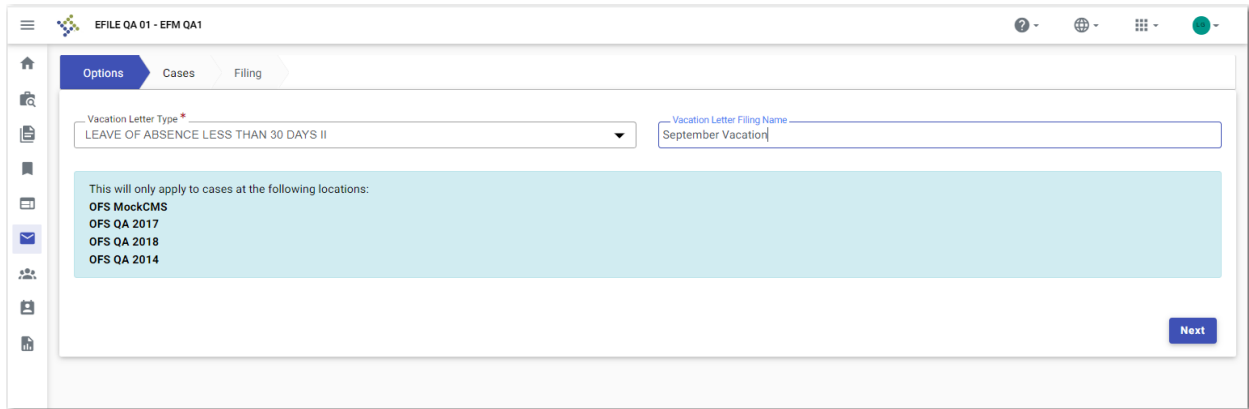


Figure 20.6 – Example of an Options Tab on the File Vacation Letter Page with Fields Completed

4. Click  .

The **Cases** tab is displayed. Your current cases are selected.

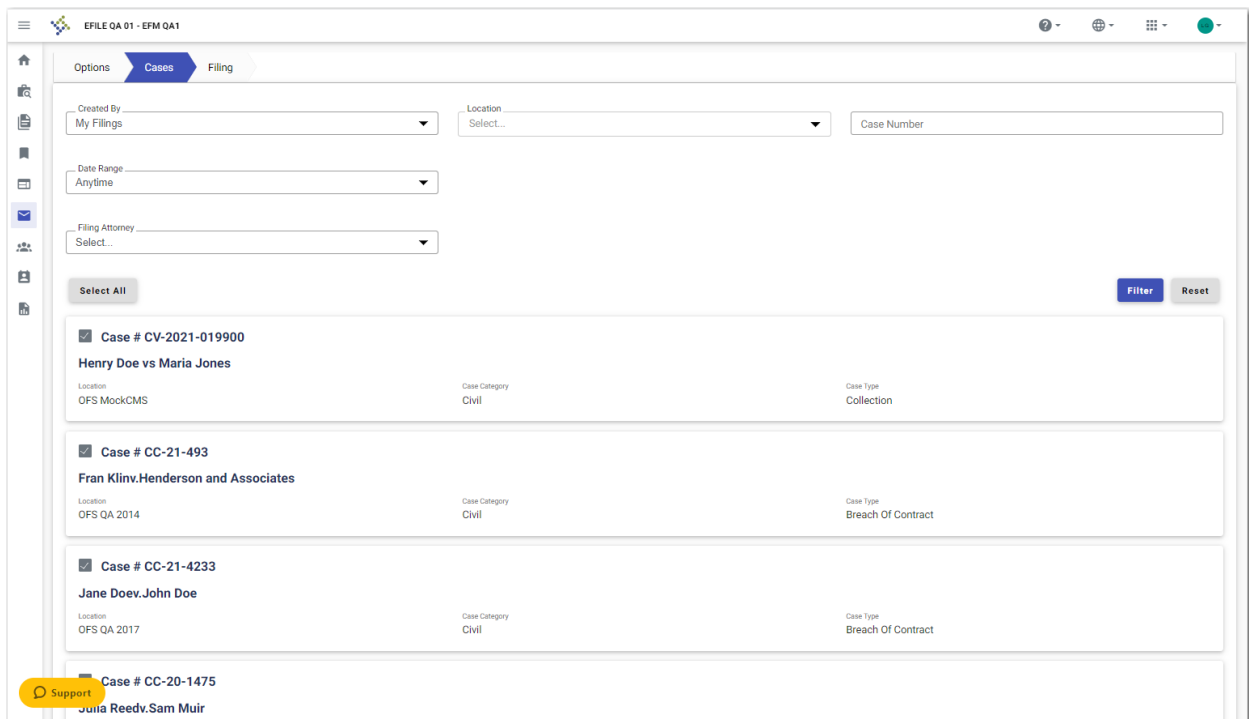



Figure 20.7 – Example of a Cases Tab on the File Vacation Letter Page

5. If you do not want the vacation letter to be attached to a specified case, clear that case. If you later want to select all of your cases, click  .

**Note:** If you have more cases than the cases displayed on the current page, you can filter particular cases to which you want the vacation letter attached. Complete the required fields,

and then click  .

6. After you have completed or verified the information on the **Cases** tab, click **Next**.
7. On the **Filing** tab, select the filing type from the **Filing Type** drop-down list.

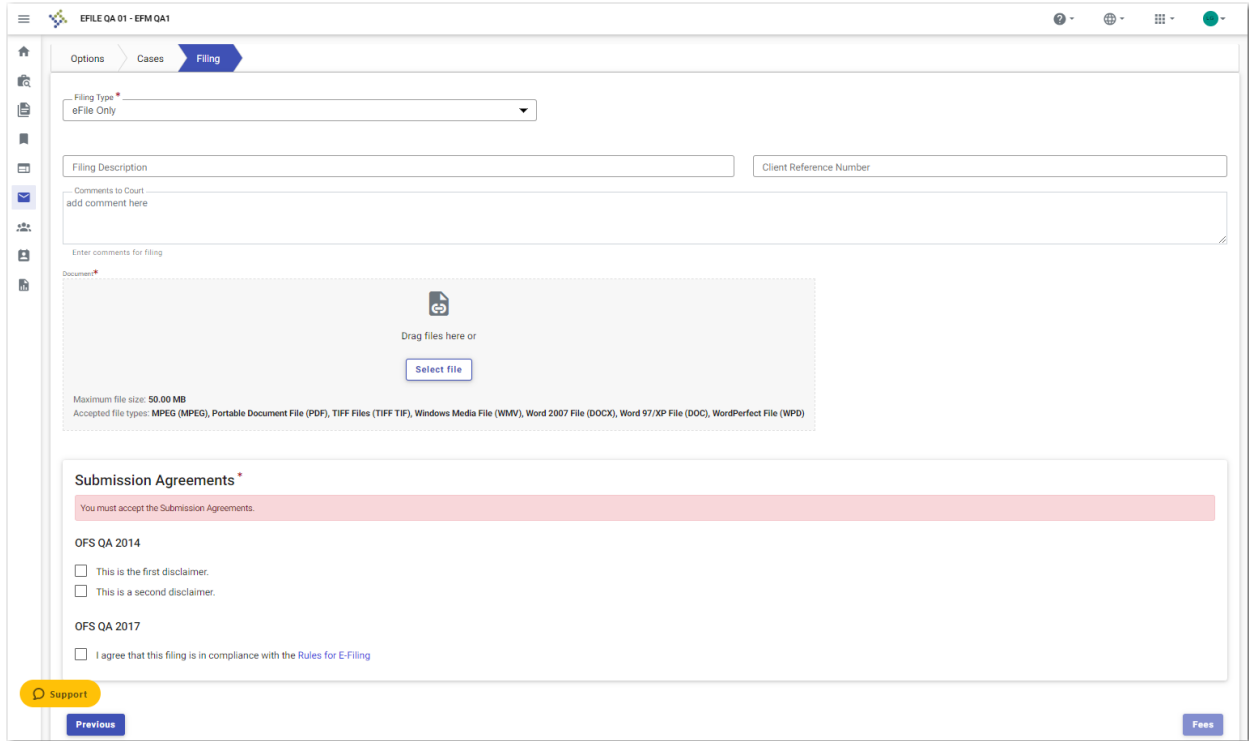


Figure 20.8 – Filing Tab on the File Vacation Letter Page

8. Click **Select files**, and then upload the vacation letter document.
9. In the Submission Agreements pane, select the disclaimers that are displayed. Then, select the **I agree that this filing is in compliance with the Rules for E-Filing** check box.

**Note:**

If submission agreements are configured by your court, you must select the check boxes in the Submission Agreements pane to complete your filing. Your court may be configured with one disclaimer or with more than one disclaimer. The specific wording of each disclaimer is configured by Tyler at the court's request.

10. Click **Fees**.

The *Bulk Fees* page is displayed.

**Note:** If there is an error in any of the cases in your bulk filing, the *Bulk Fees* page will not

display. In this situation, click **Proceed to Bulk Filing Dashboard** to correct the error.

## Correcting an Error in a Vacation Letter Filing

While you are on the **Filings** tab, if you have an error in one or more of your vacation letter filings, you cannot continue to the *Bulk Fees* page until you correct the error.

**Note:** After you click the **Fees** button, if you have an error in one or more of your vacation letter filings, the **Proceed to Bulk Filing Dashboard** button is displayed. You must click the button and return to the *Bulk Filing Dashboard* page to correct the errors.

To correct an error in one or more of your filings:



1. From the **Filings** tab, click . The *Bulk Filing Dashboard* page is displayed.
2. Locate the first case card that has a warning message.

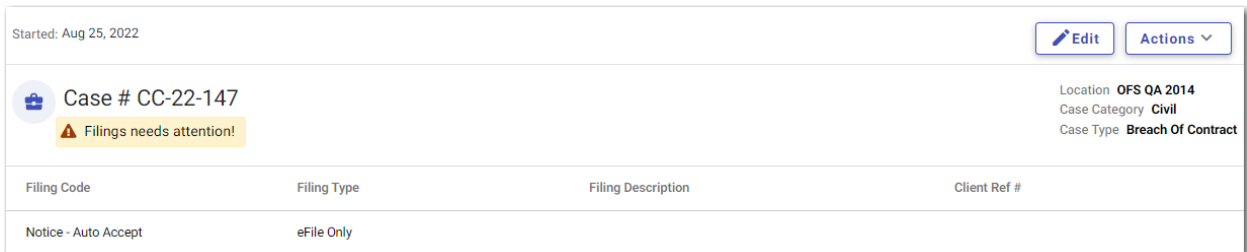


Figure 20.9 – Example of a Case Card with a Filings Error

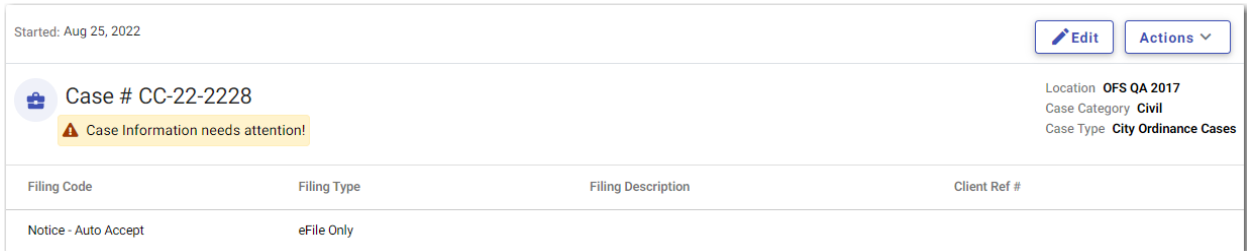


Figure 20.10 – Example of a Case Card with a Case Information Error

3. On the first case card, click . The page on which the error occurs is displayed.
4. Correct the error on the page. Then, click . The *Bulk Filing Dashboard* page is displayed.
5. Continue to correct errors for each case that has a warning message.
6. When all errors have been corrected, click . The *Bulk Fees* page is displayed.



# Entering Payment Information for a Vacation Letter (or Leave of Absence) Filing

Enter the payment information for your vacation letter (or leave of absence) filing on the *Bulk Fees* page.

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

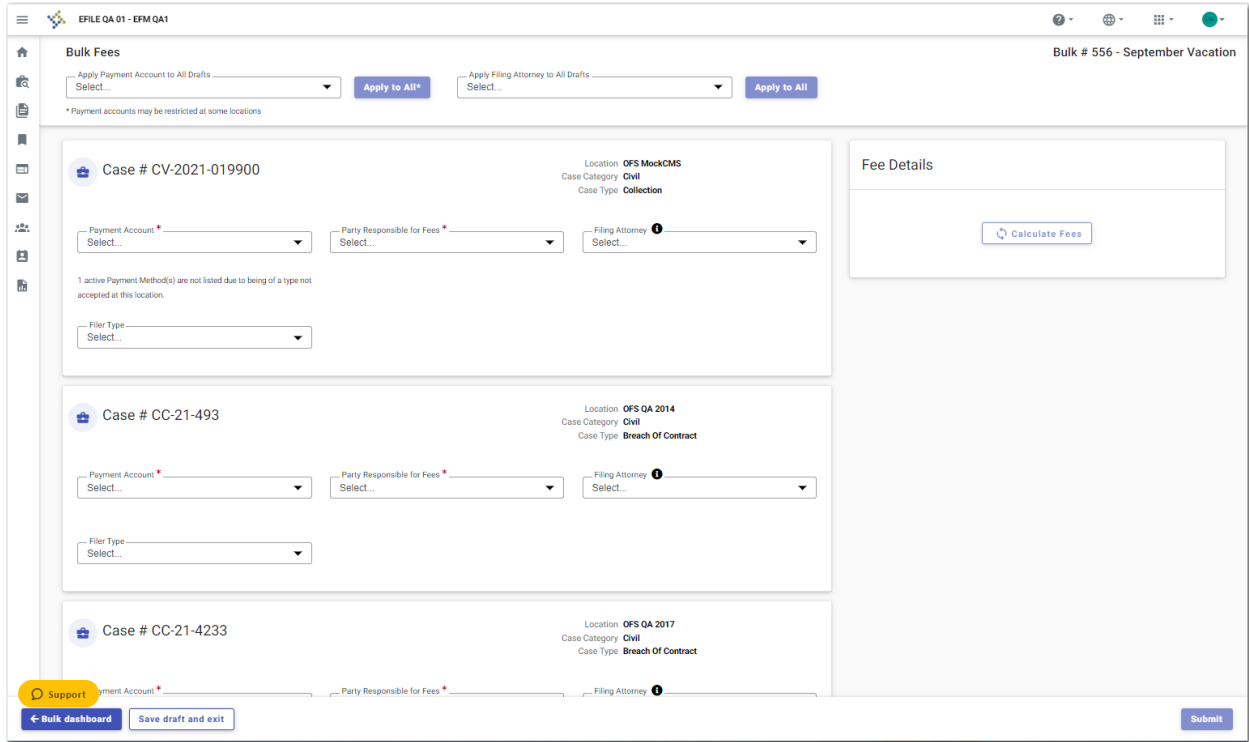




Figure 20.11 – Example of a Bulk Fees Page

To enter the payment information for your vacation letter filing:

**Note: If you do not want to apply the same payment account and filing attorney to all of the cases, you must select the payment account and the filing attorney for each individual case.**

1. Select the payment account from the **Apply Payment Account to All Drafts** drop-down list. Then, click  to apply the selected payment account to all of the cases in the bulk filing.
2. Select the filing attorney from the **Apply Filing Attorney to All Drafts** drop-down list. Then, click  to apply the selected filing attorney to all of the cases in the bulk filing.
3. For each case, select the party responsible for fees from the **Party Responsible for Fees** drop-down list.

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

4. For each case, select the filer type from the **Filer Type** drop-down list.

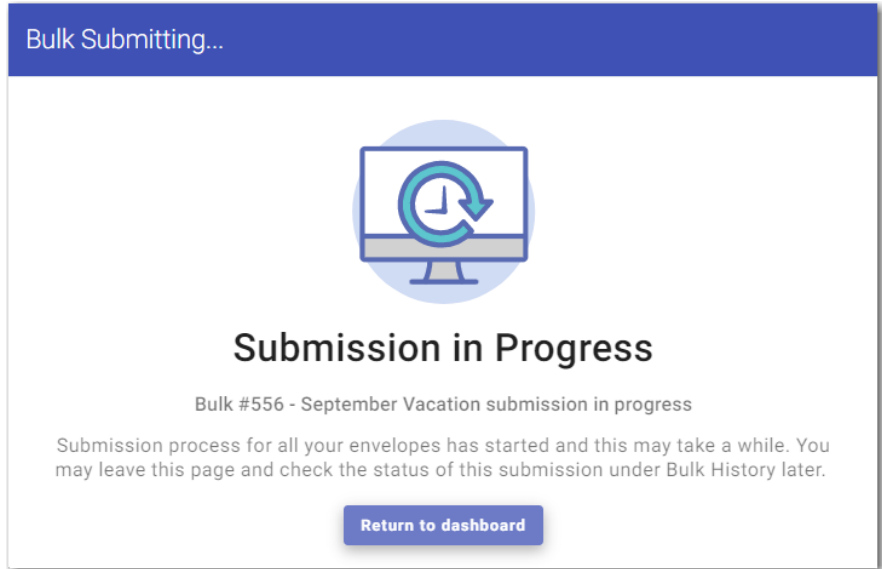
5. When all of the fields on the page have been completed, click



6. Review the filing fees, and then click



The *Bulk Submitting* window is displayed.



**Figure 20.12 – Example of a Bulk Submitting Window**

7. Click



# 21 Reports

## Topics covered in this chapter

### ◆ Running a Report

You can run a report that can be used to reconcile financial transactions for envelopes and filings that you or a member of your firm submitted. The report is available in a Microsoft Excel spreadsheet that you can download.

## Running a Report

To run a report:

1. On the Dashboard menu, click **Reports**.

The *Filings Report* page is displayed.

### Filings Report

Useful when reconciling financial transactions against envelopes submitted during a selectable time frame up to 60 days. \* Provides envelope and filing level information specific to fees. \* Delivered in an Excel spreadsheet to allow for filtering and searching.

**Submitted By:**

My Filings   
  My Firm

Locations

All Locations ×

Filter

Statuses

All Statuses × x ▼

Date From \* 📅

Date From is Required.

Date To \* 📅

Date To is Required.

Cancel
Download Report

**Figure 21.1 – Example of a Filings Report Page**

2. Select the appropriate option for the report, either **My Filings** or **My Firm**.
3. Click Filter to select the locations for which you want to run the report. The *Select Locations* dialog box is displayed.

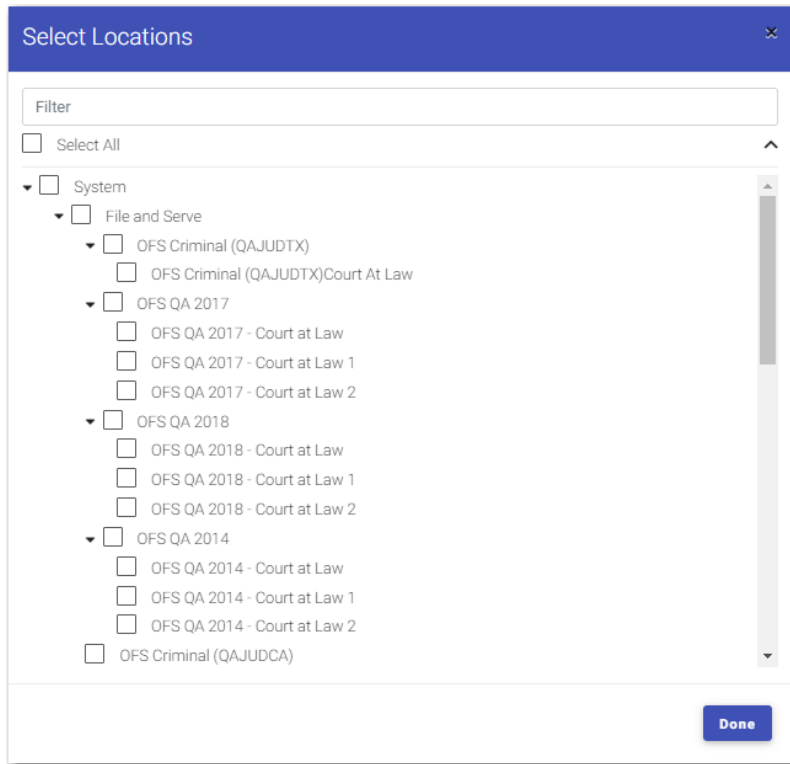



Figure 21.2 – Select Locations Dialog Box

4. Select the locations that you want to include in the report, and then click .
5. From the **Statuses** drop-down list, select the statuses that you want to include in the report.

6. Type the date range for the report, or click  to select the dates from the calendar.

**Note: The date range that you select cannot exceed 60 days. If it does, an error message is displayed.**

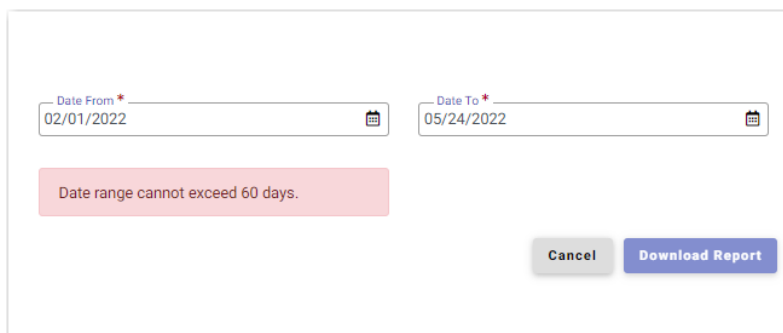



Figure 21.3 – Error Message for Report Date Range

7. Click .

The report is downloaded in a Microsoft Excel file, which you can filter and sort as needed. The report includes one tab for filings and one tab for envelopes.

# 22 Support and Feedback

## Topics covered in this chapter


- ◆ Requesting Support
- ◆ Zendesk Support
- ◆ Providing Feedback
- ◆ Tyler Technologies Technical Support Contact Information

You can request technical support for the application, or you can provide feedback for the application.

## Requesting Support

You can request support from Tyler regarding the application.

To request support regarding the application:

1. Click  in the File & Serve header.  
The **Support** drop-down list is displayed.

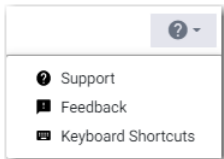


Figure 22.1 – Support Drop-Down List

2. Click **Support**.  
The *Support* window is displayed.  
**Note:** Your screen may vary from the example provided.

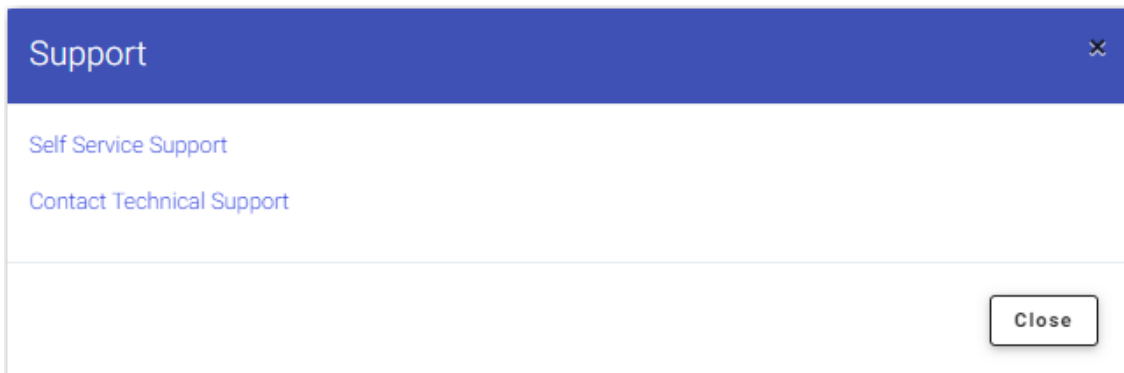


Figure 22.2 – Example of a Support Window


3. Click the support link that you want.

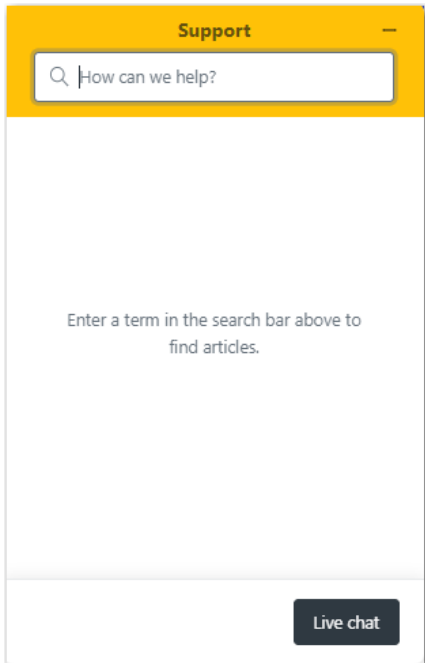
The appropriate Tyler support page is displayed in a new tab, depending on the link that you clicked.

4. Click  .

## Zendesk Support

A **Support** button is displayed on every page in the application.

- Click  to open a chat window.



**Figure 22.3 – Support Chat Window**

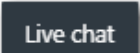
- In the chat window, click  . Another window is displayed. From this window, you can start a chat with a Support representative.



Figure 22.4 – Start Chat Window

Complete the required fields, and then click . A Support representative will assist you.

## Providing Feedback

You can provide feedback to Tyler regarding the application if you want. You can also request a new feature.

To provide feedback regarding the application or to request a new feature:

1. Click  in the File & Serve header.  
The **Support** drop-down list is displayed.

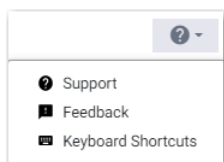


Figure 22.5 – Support Drop-Down List

2. Click **Feedback**.  
The *Feedback* window is displayed.

Figure 22.6 – Feedback Window

3. Select the appropriate option from the **Feedback Type** drop-down list.

Figure 22.7 – Feedback Type Drop-Down List

4. Type your feedback or suggestion in the **Feedback** comments window.
5. Select the **“It is ok to contact me about this feedback”** check box if you want Tyler to contact you for more information, or leave the check box cleared if you do not want to be contacted.

6. Click .

7. Click .

# Tyler Technologies Technical Support Contact Information

For assistance, contact Tyler Technologies through the following resources.

Resource	Contact Information
Odyssey File & Serve Support Hours	7:00 a.m. to 9:00 p.m. (CT), Monday through Friday
Odyssey File & Serve Support Chat	Assistance is also available online through <a href="#">Support Chat</a> .
Odyssey File & Serve Email	<a href="mailto:efiling.support@tylertech.com">efiling.support@tylertech.com</a>
Odyssey File & Serve Telephone	800.297.5377
GoTo Assist (Support)	Support may ask to assist you by sharing your screen using <a href="#">GoToAssist</a> .