# Individual Filer User Guide

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

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ESO-FS-200-4494 v.19

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# Copyright and Confidentiality



# Publishing History

| Document Publication Number | Revision | Date | Changes Made |
|---|---|---|---|
| OFS-FS-200-4494 v.1 | Initial | July 2019 | Document Creation |
| OFS-FS-200-4494 v.2 | Second | December 2019 | The following changes were made:<br>• Added sections for templates, bookmarks, and the Redaction feature.<br>• Added a procedure for non-indexed subsequent filing.<br>• Added a procedure for entering case information for a civil case.<br>• Added a procedure for entering case cross references to a filing.<br>• Added a procedure for entering a filing with a motion type code.<br>• Added a section for client support and feedback.<br>• Updated the description and screen shots of the Dashboard and the drop-down menu for filer actions.<br>• Updated screen shots throughout the document to reflect minor software changes. |
| OFS-FS-200-4494 v.3 | Third | February 2020 | The following changes were made:<br>• Added a procedure for filing a new case with a Will Filed date.<br>• Added a procedure for entering the date of death on the *Parties* page. |

| Document Publication Number | Revision | Date | Changes Made |
|---|---|---|---|
| | | | • Added a procedure for entering a filing with an Ad Damnum amount.<br>• Added a procedure for entering a filing with a Claim Amount.<br>• Added a procedure for entering a filing with an Estate Value.<br>• Updated the *Parties* page.<br>• Updated the procedure for entering a filing.<br>• Updated the Redaction section.<br>• Added a procedure for copying an envelope.<br>• Updated the *Fees* page.<br>• Updated the *Summary* page. |
| OFS-FS-200-4494 v.4 | Fourth | April 2020 | The following changes were made:<br>• Added the Return Date feature.<br>• Added the Hearing Date feature.<br>• Added a note throughout the document regarding the **Party Responsible for Fees** field. |
| OFS-FS-200-4494 v.5 | Fifth | June 2020 | The following changes were made:<br>• Added the Reports feature.<br>• Added the **Dashboard** button to the *Case Search* page. |
| OFS-FS-200-4494 v.6 | Sixth | September 2020 | The following changes were made:<br>• Updated release number to match the current software release<br>• Added browser support for Microsoft® Edge® to the “System Requirements” section |
| ESO-FS-200-4494 v.7 | Seventh | December 2020 | The following changes were made: |

| Document Publication Number | Revision | Date | Changes Made |
|---|---|---|---|
| | | | • Added a note to the envelope details section regarding newly-added parties for subsequent filings<br>• Added a note in all existing case topics indicating that the **Add Party** button is configurable for subsequent filings<br>• Added a new screen shot for the *File into Existing Case* window when the **Party Name** search option is not displayed. Information was added to the following topics:<br>– Orientation<br>– Dashboard Page<br>– Filing into an Existing Case from the Case Search Page<br>– Filing into an Existing Case from the Dashboard Page<br>– Filing into a Non-Indexed Case<br>• Added a section describing the new Zendesk Help icon<br>• Changed the document numbering to reflect new standards |
| ESO-FS-200-4494 v.8 | Eighth | December 2020 | The following changes were made:<br>• Updated the screen shot for the *Reports* page<br>• Added the document security option to the “Creating a Service Only Filing” topic |
| ESO-FS-200-4494 v.9 | Ninth | February 2021 | The following changes were made:<br>• Added information regarding the new *Start Filing* page |

| Document Publication Number | Revision | Date | Changes Made |
|---|---|---|---|
| | | | • Added information about the new Mail Service fees<br>• Added information about tracking certified mail for a filing on the *Envelope Details* page<br>• Updated the Service Contacts section to include information about the service method drop-down list on the *Service* page<br>• Updated the “Creating a Service Only Filing” topic<br>• Updated the “Filing into an Existing Case from the Dashboard Page” topic |
| ESO-FS-200-4494 v.10 | Tenth | March 2021 | The following changes were made:<br>• Reordered chapters to better represent normal usage during a case filing<br>• Updated the *Upload Documents* page to include all document types that are now supported for uploading<br>• Added the case level address feature<br>• Revised the “Viewing the Envelope Details” topic<br>• Created separate topic for viewing mail service fees in the envelope details |
| ESO-FS-200-4494 v.11 | Eleventh | May 2021 | The following changes were made:<br>• Added bulk filing to this release<br>• Added the ability to add a service contact that is not associated with any party on the case to an initial filing |
| ESO-FS-200-4494 v.12 | Twelfth | July 2021 | The following changes were made:<br>• Added the vacation letter (or leave of absence) feature<br>• Added the capability to collect additional data on |

| Document Publication Number | Revision | Date | Changes Made |
|---|---|---|---|
| | | | the *Case Information* page. The data that is collected is then transferred to forms used in civil and family cases.<br>• Added the Service of Process feature. The data that is collected is then transferred to forms used in civil and family cases.<br>• Updated the case search sections to include the use of the ENTER button for case searches |
| ESO-FS-200-4494 v.13 | Thirteenth | October 2021 | The following changes were made:<br>• The *Fees* page has been updated to allow filers to create payment accounts on the *Fees* page during filing creation.<br>• The **Documents** tab has been changed to the **Preload Documents** tab.<br>• The Upload Documents pane on the *Filings* page has been changed to the Documents pane. The **Add Documents** button in the Documents pane has been changed to the **Select Documents** button.<br>• The *Envelope Submitting* window has been added at the end of the filing process. After filers click the **Submit** button, the *Envelope Submitting* window is displayed with three options for the filer's next step. The options include the following: return to the *Dashboard* page, view the receipt, or start a new envelope. |
| ESO-FS-200-4494 v.14 | Fourteenth | November 2021 | The following changes were made:<br>• Updated the requirements for registering as an individual filer<br>• Added the ability to view service contact history |

| Document Publication Number | Revision | Date | Changes Made |
|---|---|---|---|
| | | | • Added the ability to view the case judicial officer from specified pages in the application<br>• Added the ability to search and filter specified drop-down menus<br>• Updated the Support and Feedback sections<br>• Added the ability to view the Return Date and Out of State indicator in the envelope details |
| ESO-FS-200-4494 v.15 | Fifteenth | November 2021 | The following changes were made:<br>• Updated the “Redaction” chapter to include the addition of the transactional redaction feature<br>• Updated the *Filings* page sections to include the required optional services feature<br>• Added descriptions of the additional fields on the *Parties* page in the **Additional Identifiers** tab<br>• Added a section for the new keyboard shortcuts, available through the **Help** drop-down list<br>• Updated the “Support and Feedback” chapter to include the revised **Help** drop-down list<br>• Added the “Manage Account” chapter<br>• Revised “Changing the User Password” and moved the section to the “Manage Account” chapter<br>• Added a description of the new *Profile* page<br>• Added a description of the new *Email Notifications* page<br>• Revised the “Signing Out” section |

| Document Publication Number | Revision | Date | Changes Made |
|---|---|---|---|
| | | | • Removed **Account Settings** from the Dashboard menu. Also removed the **Account Settings** description from the “Orientation” section.<br>• Added a chapter to describe how to access re: Search from Odyssey File & Serve |
| ESO-FS-200-4494 v.16 | Sixteenth | December 2021 | The following changes were made:<br>• Removed the *Preload Documents* page and replaced all screen shots where the **Preload Documents** tab was previously displayed<br>• Replaced the *Start Filing* page throughout the document, reflecting the removal of the **Location** drop-down list<br>• On the *Filings* page, changed the Documents pane to the Upload Documents pane. Also changed “Component” to “Type” in the Upload Documents pane headers<br>• Replaced screen shots to reflect the new page headers for the following pages:<br>– Payment Accounts<br>– My Information<br>– Change Password<br>– Profile<br>– Email Notifications<br>• Reordered some of the sections in the “Case Information” chapter<br>• Removed the “Uploading Documents for a New Case Filing” section<br>• Removed the “Uploading Documents for a Bulk Filing” section |

| Document Publication Number | Revision | Date | Changes Made |
|---|---|---|---|
| | | | • Removed the Unused Documents message from the *Summary* page |
| ESO-FS-200-4494 v.17 | Seven-teenth | January 2022 | The following changes were made:<br>• Changed the *Start Filing* page throughout the document<br>• Added information on creating draw-down accounts<br>• Updated the “Payment Accounts” chapter to reflect the change to the payment account pane for adding new payment accounts<br>• Added draw-down accounts to the account types listed for creating new payment accounts on the *Fees* page<br>• Added envelope-level information to the *Case Information* page, the *Summary* page, and the envelope details<br>• Updated the “File into an Existing Case” chapter<br>• Removed the topic “Filing into an Existing Case from the Case Search Page” and included the information in other topics<br>• Updated screen shots to reflect the addition of the **Filter** option on the *Templates* pages<br>• Updated screen shots in the “Payment Accounts” chapter to reflect the changes to the **Add Payment Account** button<br>• Changed the example screen shot of the public service contacts list to show the addition of the firm name associated with each service contact |

| Document Publication Number | Revision | Date | Changes Made |
|---|---|---|---|
| ESO-FS-200-4494 v.18 | Eighteenth | June 2022 | The following changes were made:<br>• Updated all screen shots to reflect the new user interface<br>• Revised steps in applicable sections to reflect changes to the filing flow<br>• Added information about adding the current filer as a service contact in a case filing<br>• Added information on the Merge Document feature |
| ESO-FS-200-4494 v.19 | Nineteenth | September 2022 | The following changes were made:<br>• Throughout the document, updated the screen shots of the Dashboard<br>• Throughout the document, updated the screen shots of the *Dashboard* page<br>• Throughout the document, updated the screen shots of the *Start Filing* page<br>• Throughout the document, updated the screen shots of the *Filing History* page<br>• Throughout the document, updated the screen shots of the *Filing Drafts* page<br>• Throughout the document, updated several screen shots of the *Envelope Details* page<br>• Updated the “Keyboard Shortcuts” topic<br>• Updated the “Drop-Down Lists” topic<br>• Updated the “Orientation” topic<br>• Added the topic “Message to Users Who Have Not Activated Their Accounts”<br>• Updated the “Manage Account” chapter<br>• Updated the “Dashboard” chapter |

| Document Publication Number | Revision | Date | Changes Made |
|---|---|---|---|
| | | | • Updated the “Payment Accounts” chapter<br>• Updated the example screen shot of the *Edit Party Details* page<br>• Updated the “Merging Documents for File Upload in a Case Filing” topic<br>• Updated several screen shots in the “View Case Judicial Officer” topic<br>• Updated the “Redaction Feature” chapter. Removed topics that no longer apply.<br>• Updated the “File into an Existing Case” chapter<br>• Updated the “Access re: Search®” chapter<br>• Updated the “Service Contacts” chapter<br>• Updated the screen shots in the “Templates” chapter<br>• Updated the “Filings” chapter<br>• Updated the “Bookmarks” chapter<br>• Updated the “Bulk Filing” chapter<br>• Updated the “Vacation Letter (or Leave of Absence)” chapter<br>• Updated the “Reports” chapter<br>• Updated the “Support and Feedback” chapter |

# Contents

# List of Figures

# 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 |
|---|---|---|
| **Bold** | Shorthand notation for a menu, menu item, optional cascading menu, or selected tab<br><br>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 **Tools →Options→Forms**.<br><br>Click **License Key Editor**. |
| `Fixed-Width` | User interface (UI) input typed exactly as shown<br><br>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 `Boston` in the **City** field.<br><br>Run the `tables.sql` script for the `jcpBasketB` database. |
| *Italics* | Page and dialog box names<br><br>Document titles<br><br>Variable data to be replaced by an appropriate value | Return to the *Home* page.<br><br>Refer to the *Navigation Guide*.<br><br>Type the *filename*. |
| "Quotation marks" | Chapter within a document<br><br>Rights on a role<br><br>Job tasks within a job definition | Refer to the "Logic Rules" chapter.<br><br>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 |
|---|---|---|
| | **Note** | Notes provide extra details about a topic or step. |
| | **Caution** | Caution messages indicate that a specific action could cause an error in the system. |
| | **Warning** | Warning messages indicate that a specific action could cause an interruption of service. |
| | **Danger** | 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 *Dashboard* page have been updated. | Throughout the document, all screen shots of the *Dashboard* page have been replaced. |
| The *Start Filing* page has been changed. | Throughout the document, all screen shots of the *Start Filing* page have been replaced. |
| The *Filing History* 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 *Filing History* page have been replaced. |

| Feature/Update | Description/Location in Document |
|---|---|
| The *Filing Drafts* 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 *Filing Drafts* page have been replaced. |
| The *Envelope Details* page has been redesigned for an improved filer experience. | Throughout the document, several screen shots of the *Envelope Details* page have been replaced. |
| The keyboard shortcuts option has been added to the **Support** drop-down list. The *Keyboard Shortcuts* window also has been updated. | Keyboard Shortcuts, page 5 |
| The *Case Search* page has been changed to the *Search for Case* page. The name of the page has been updated in this topic. | Drop-Down Lists, page 6 |
| The screen shots in the “Orientation” topic have been updated. | Orientation, page 7 |
| Information regarding messages that users receive if they have not activated their accounts has been added. | Message to Users Who Have Not Activated Their Accounts, page 21 |
| The steps to follow to update the user’s information have been changed. The *Edit My Information* window has been added to the process. | Updating User Information, page 23 |
| The “Manage Account” chapter has been updated with new screen shots and revised steps, as applicable. | Manage Account, page 27 |
| The “Dashboard” chapter has been updated with new screen shots and revised steps, as applicable. | Dashboard, page 32 |
| The “Payment Accounts” chapter has been updated with new screen shots and revised steps, as applicable. | Payment Accounts, page 40 |
| The screen shot for the *Edit Party Details* page has been updated. | Entering Party Details, page 69 |
| The **Merge Document** feature has been updated. | Merging Documents for File Upload in a Case Filing, page 77 |
| Several screen shots in the “View Case Judicial Officer” topic have been updated. | View Case Judicial Officer, page 109 |
| 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 *Content Manager* window:<br>• Deleting a Redaction<br>• Working with an Existing Redaction<br>• Redaction Editor Toolbar | Redaction Feature, page 136 |
| The “File into an Existing Case” chapter has been updated with new screen shots and revised steps, as applicable. | File into an Existing Case, page 139 |

| Feature/Update | Description/Location in Document |
|---|---|
| The “Access re:Search®” chapter has been updated with new screen shots and updated information. | Access re:Search®, page 152 |
| The “Service Contacts” chapter has been updated with new screen shots and revised steps, as applicable. | Service Contacts, page 155 |
| The “Templates” chapter has been updated with new screen shots and revised steps, as applicable. | Templates, page 177 |
| The “Filings” chapter has been updated with new screen shots and revised steps, as applicable. | Filings, page 186 |
| The “Bookmarks” chapter has been updated with new screen shots and revised steps, as applicable. | Bookmarks, page 205 |
| The bulk filing process has been revised. The screen shots and steps have been updated to reflect the new bulk filing process. | Bulk Filing, page 209 |
| 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. | Vacation Letter (or Leave of Absence), page 251 |
| The “Reports” chapter has been updated with new screen shots and revised steps, as applicable. | Reports, page 261 |
| The “Support and Feedback” chapter has been updated with new screen shots and revised steps, as applicable. | Support and Feedback, page 264 |

# 2 Before You Begin

**Topics covered in this chapter**



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

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

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

## 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.

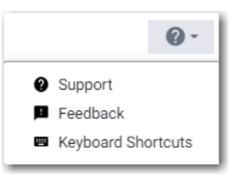



**Figure 2.1 – Support Drop-Down List**

2. Click **Keyboard Shortcuts**.

   The *Keyboard Shortcuts* window is displayed.

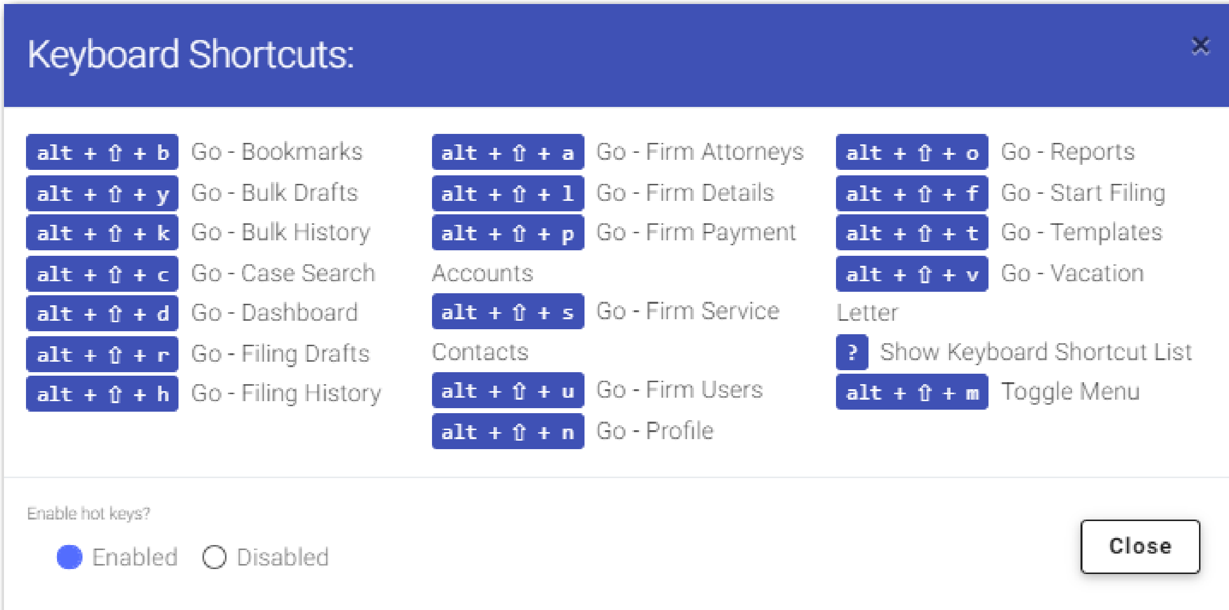



**Figure 2.2 – Example of a Keyboard Shortcuts Window**

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.

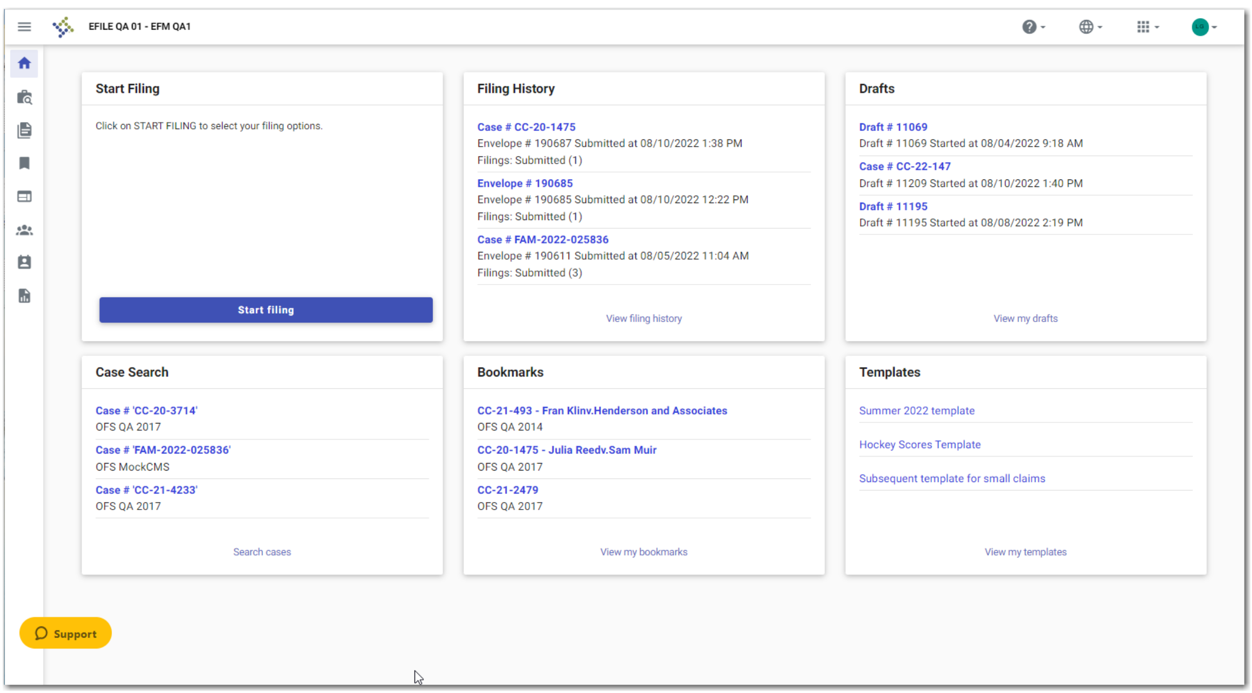



**Figure 2.3 – Example of a Dashboard Page**

### 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.

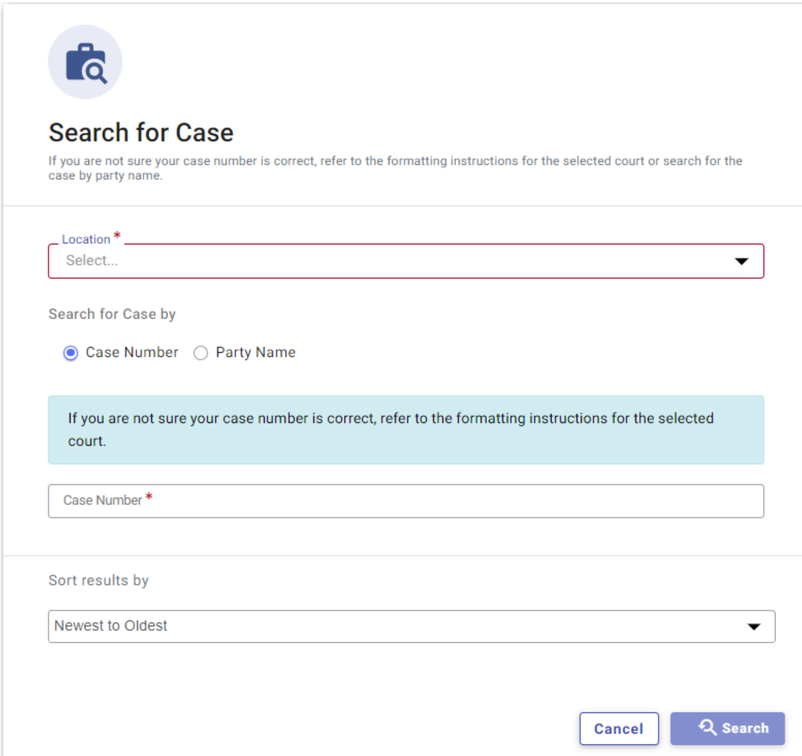



**Figure 2.4 – Example of a Search for Case Page**

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

### 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.

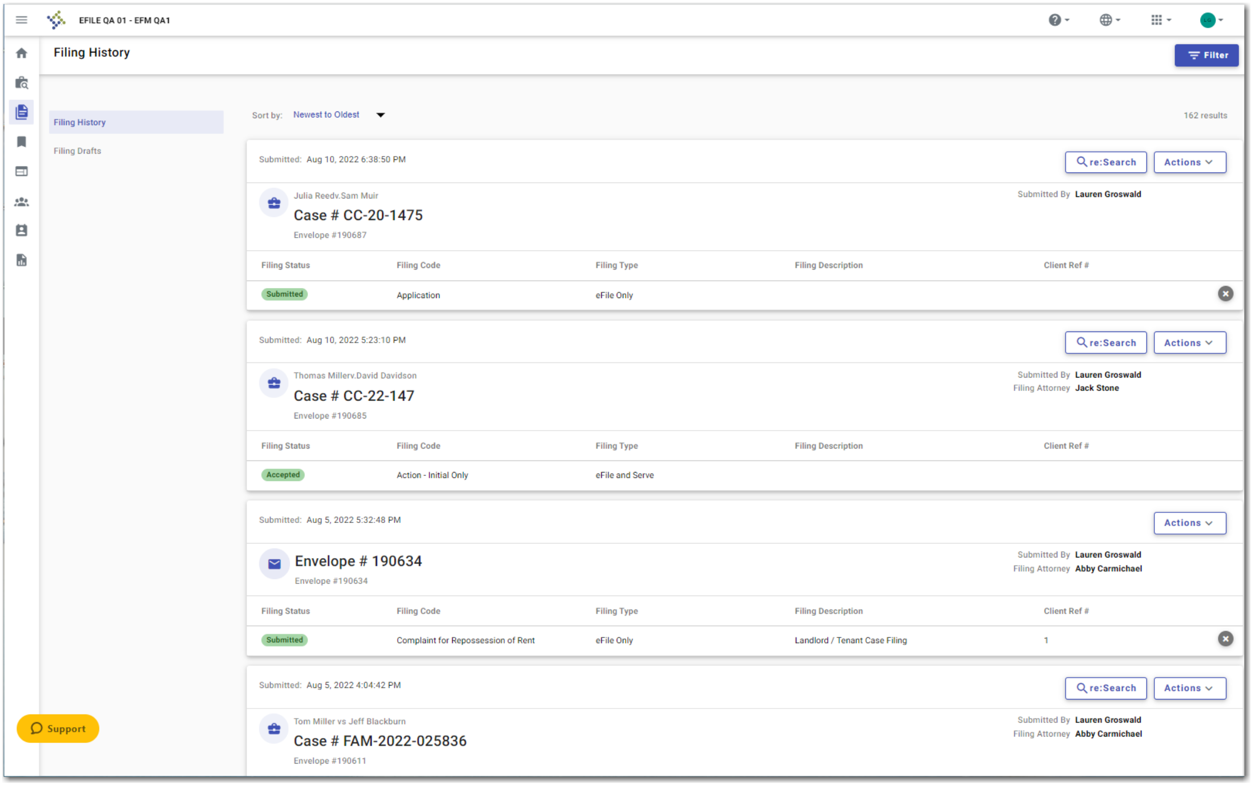



**Figure 2.5 – Example of a Filing History Page**

### 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.

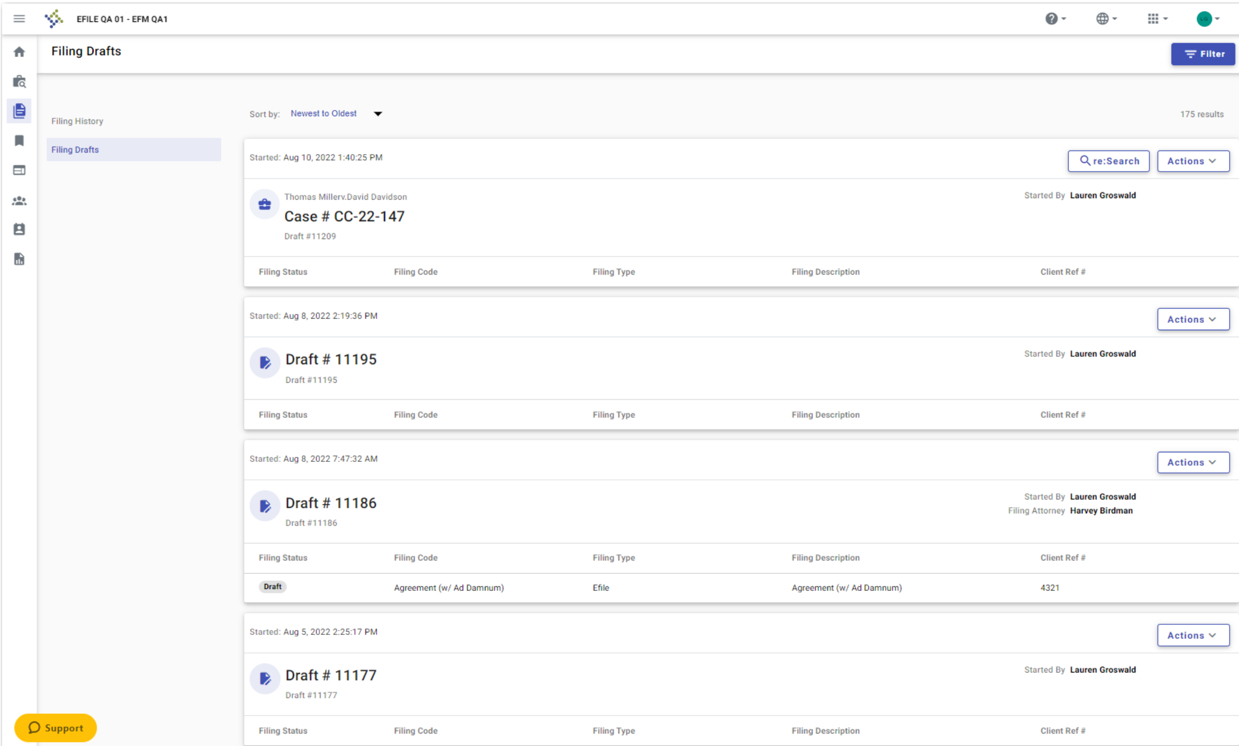



**Figure 2.6 – Example of a Filing Drafts Page**

### 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.

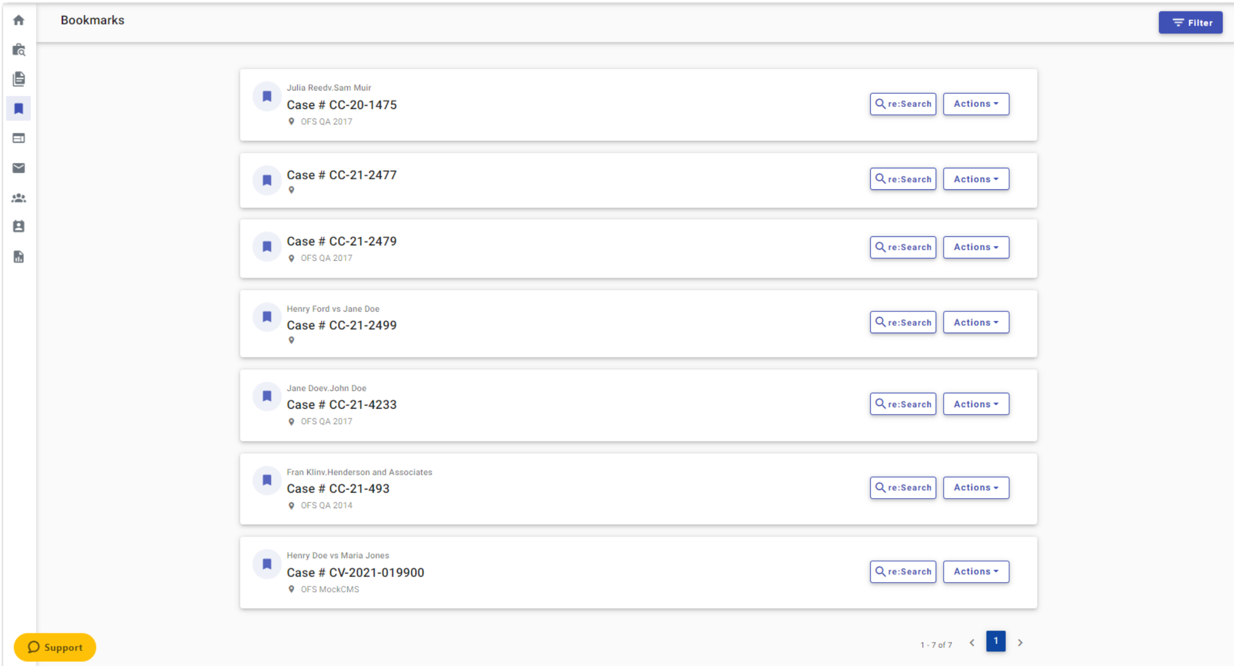



**Figure 2.7 – Example of a Bookmarks Page**

### 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.

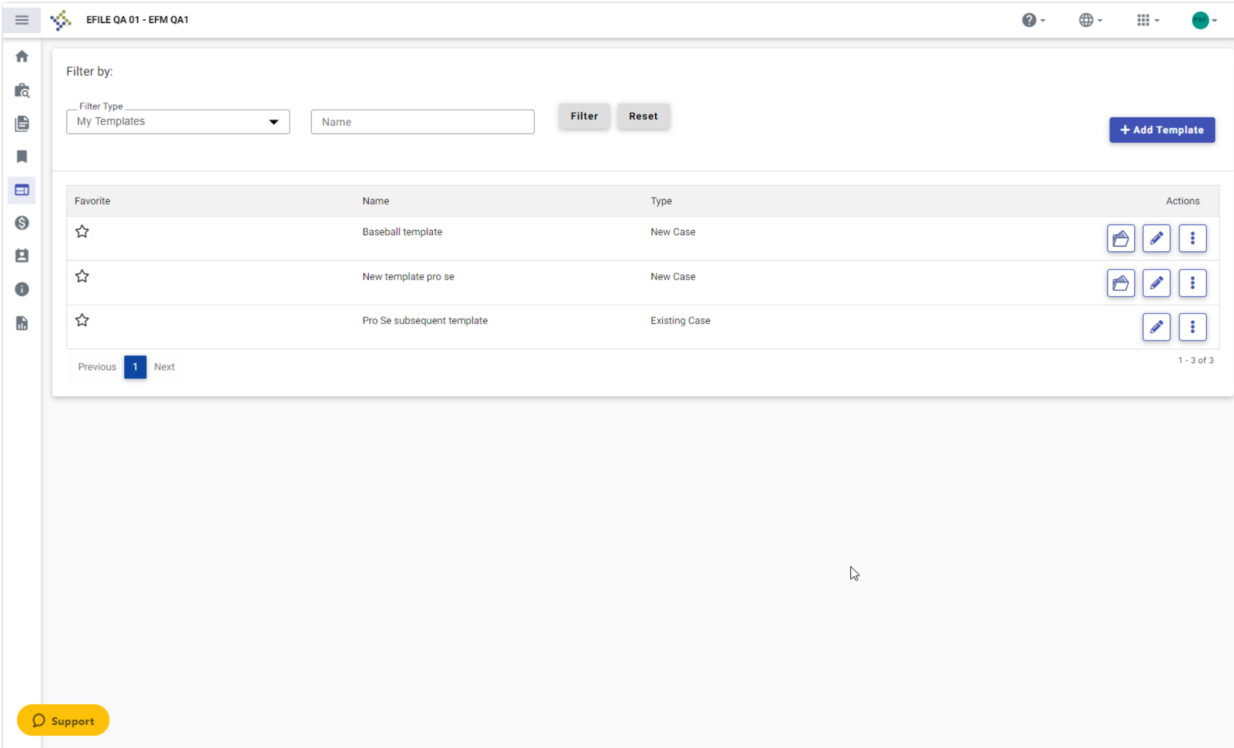



**Figure 2.8 – Example of a Templates Page**

### My Payment Accounts

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

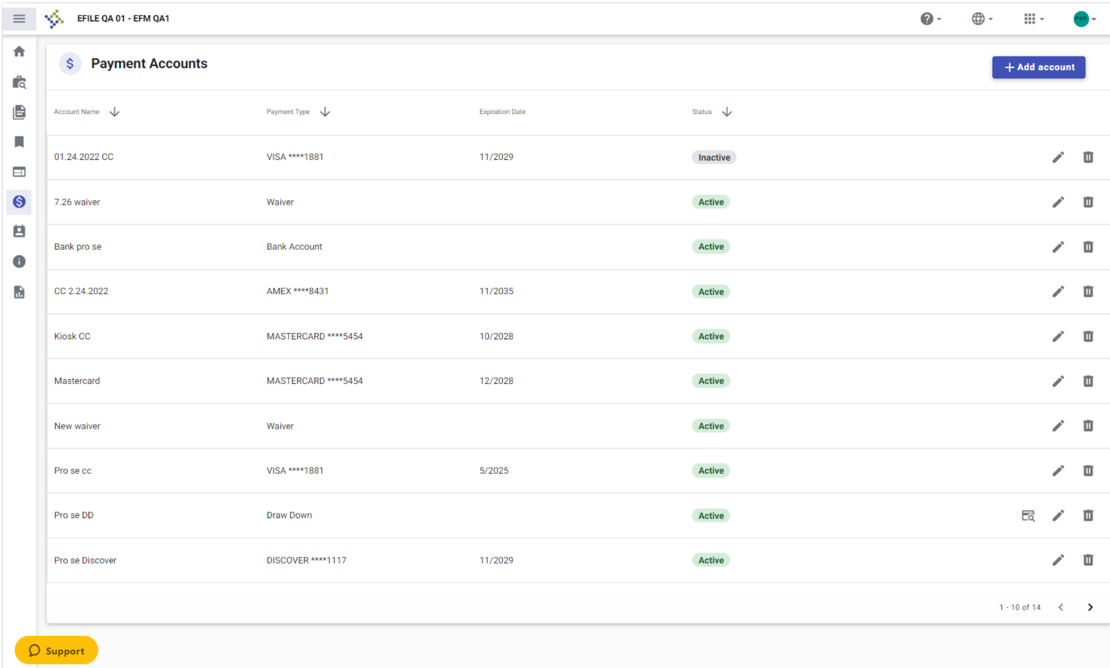



Figure 2.9 – Example of a Payment Accounts Page

### My Service Contacts

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

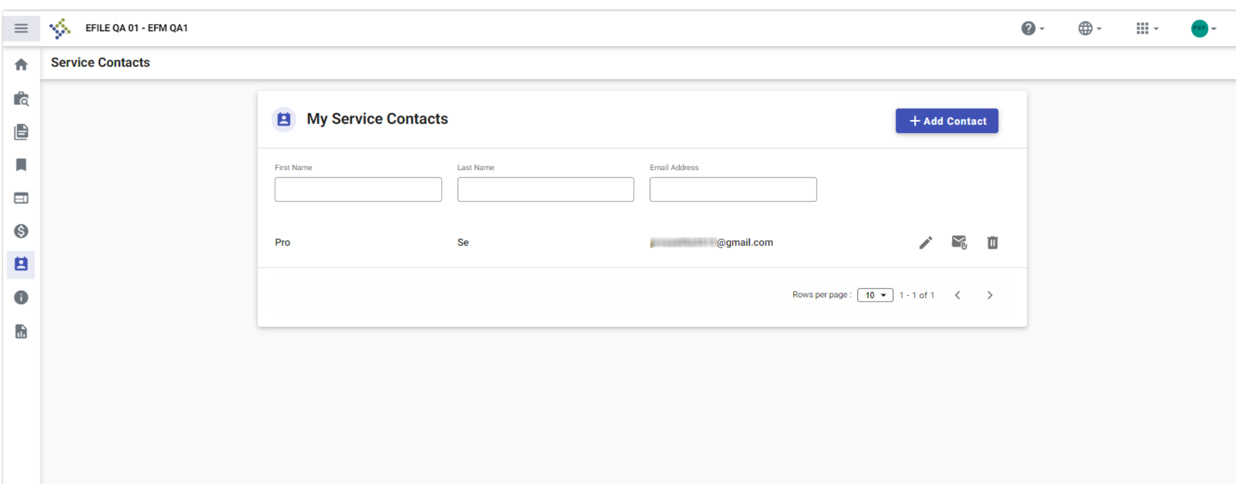



Figure 2.10 – Example of a Service Contacts Page

### My Information

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

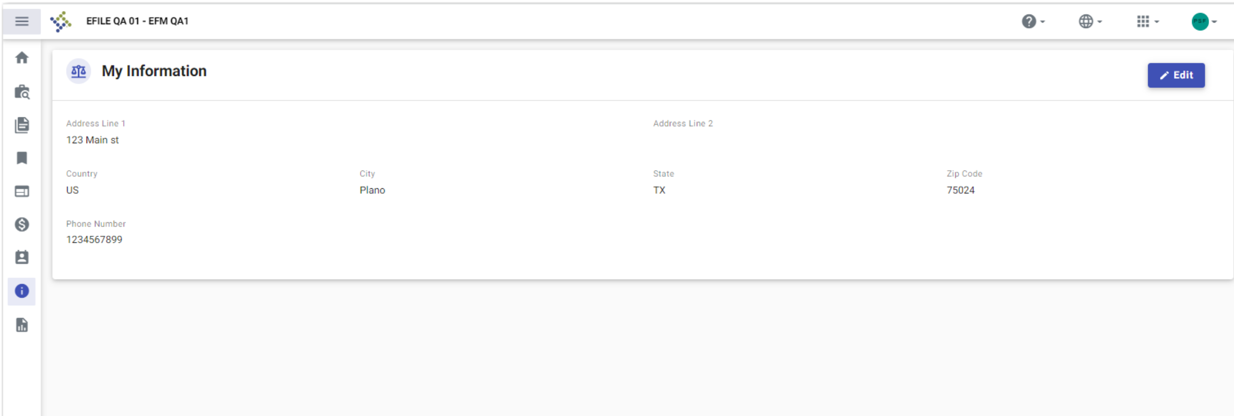



Figure 2.11 – Example of a My Information Page

## Reports

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

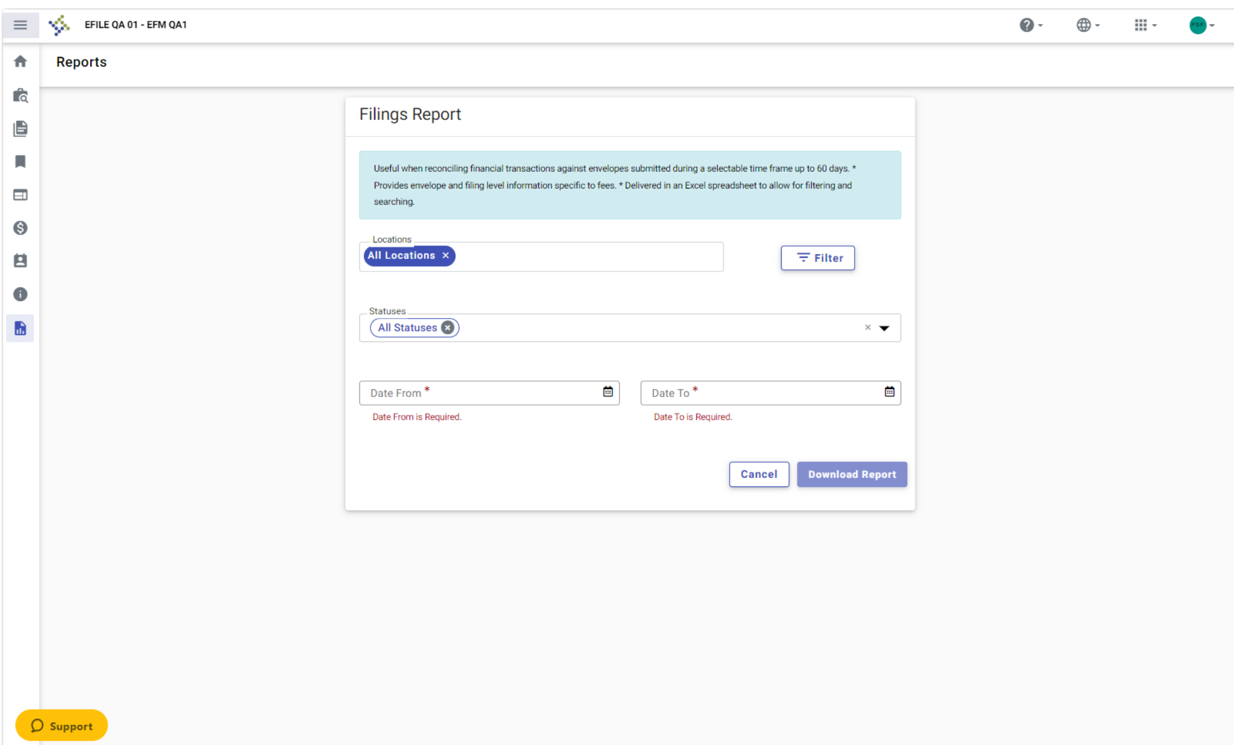



Figure 2.12 – Example of a Filings Report Page

# 3 E-Filing Overview

**Topics covered in this chapter**

♦ Filing Queue Status

This chapter describes the e-filing process.

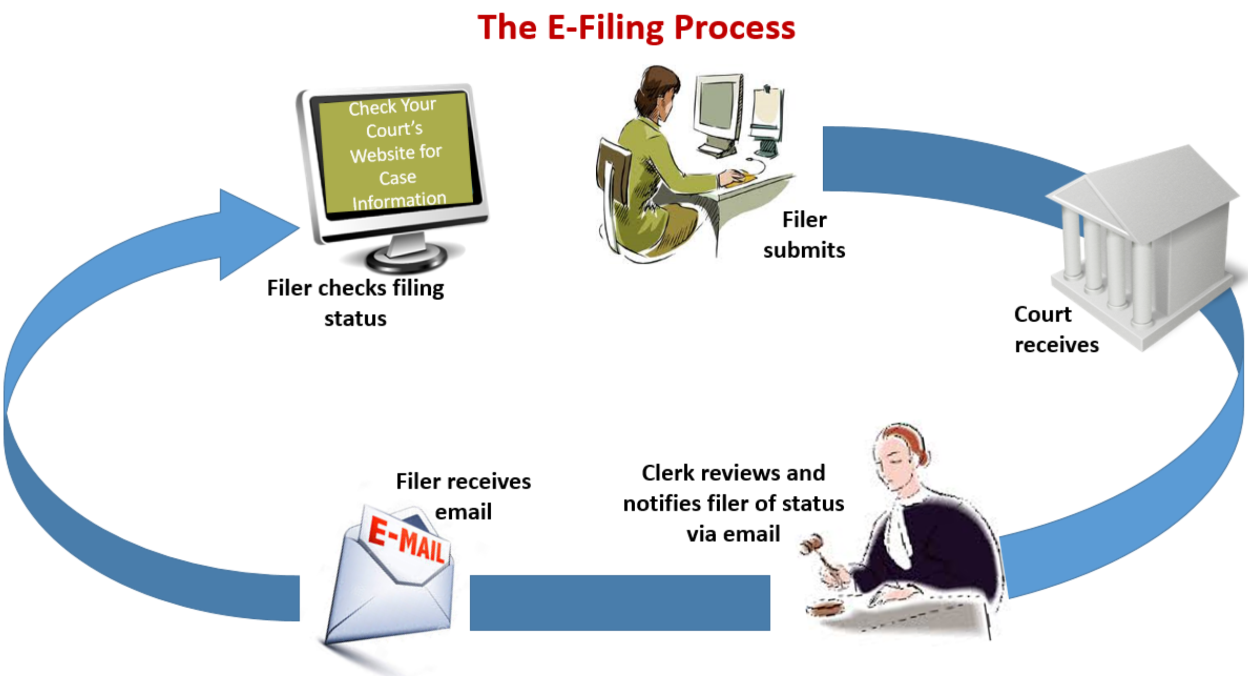



**Figure 3.1 – The E-Filing Process**

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.<br><br>**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.** |
| Receipted | 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 *Details* page, and the filer is notified of the specifics through email. |

# 4 Landing Page

**Topics covered in this chapter**



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

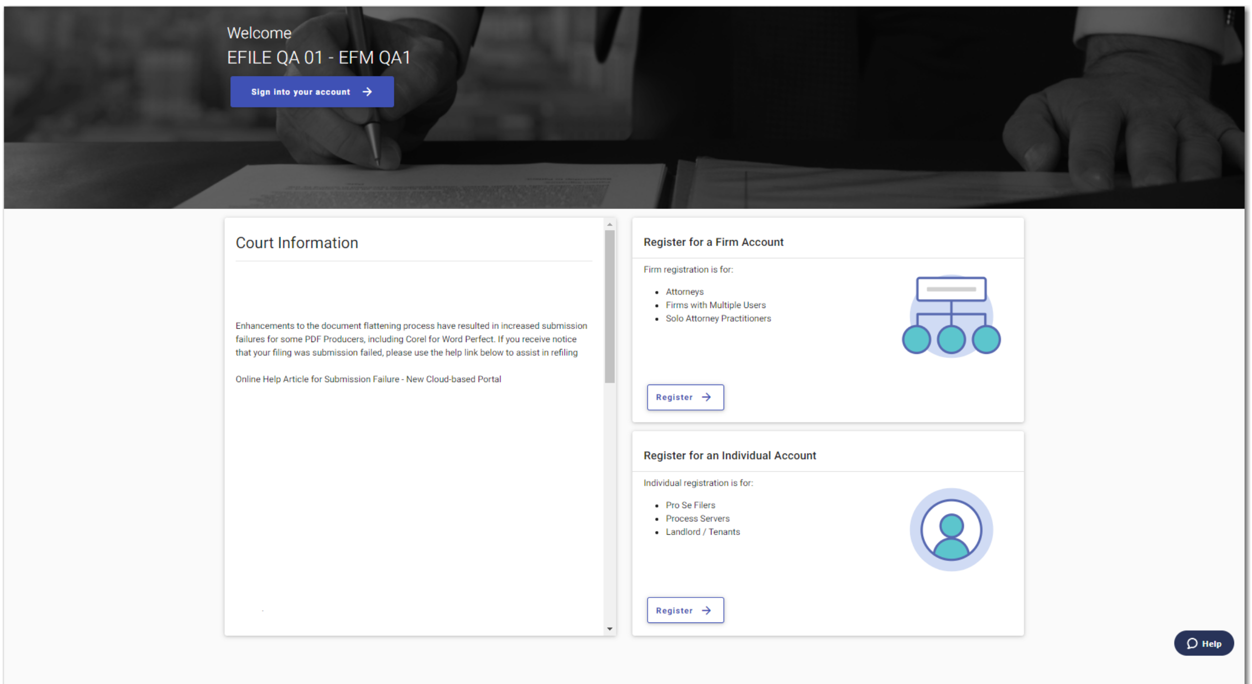


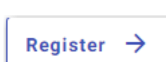

**Figure 4.1 – Example of an eFile Landing Page**

## Registering as an Individual Filer

You can register as an individual filer if you are a single user of File & Serve, and if it is allowed by your court. The term “single user” refers to a user who is neither associated with nor represented by any firm.

**Note: Refer to your local court’s website before registering as an individual filer, as registration options may vary or may not be permitted by your court.**

To register as an individual filer:

1. On the *Landing* page, click 

.

   The *Individual Account Registration* page is displayed.

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

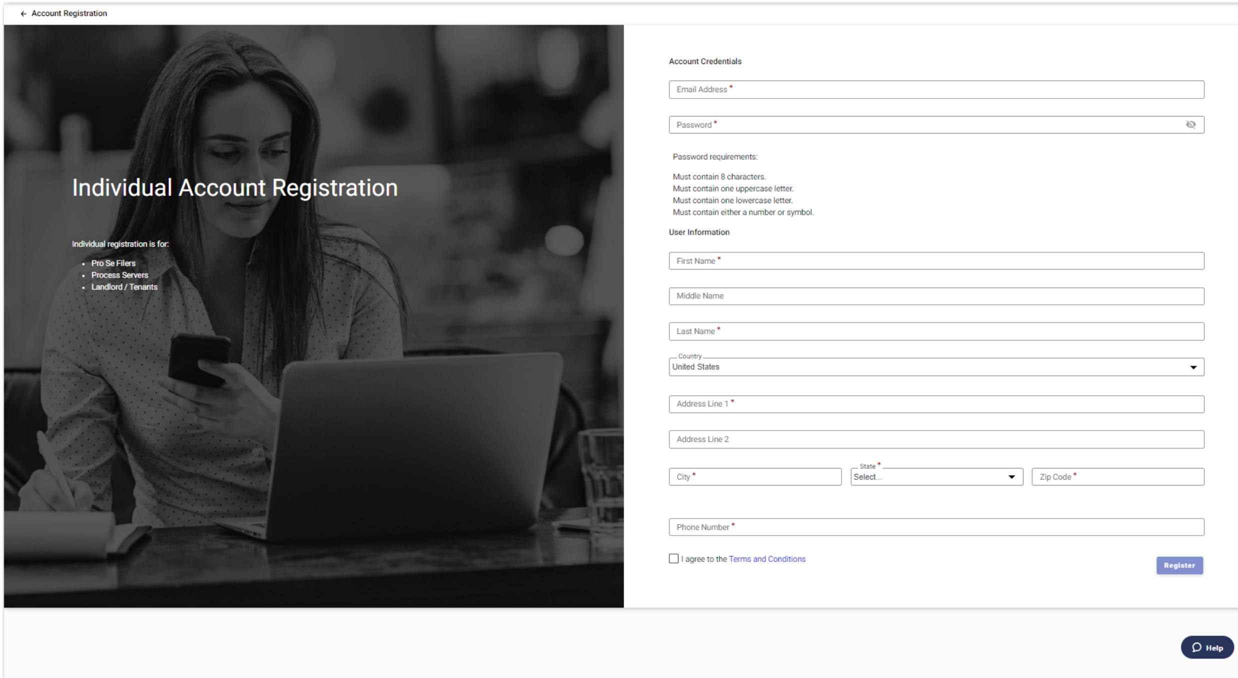



**Figure 4.2 – Example of an Individual Account Registration Page**

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 *Individual Account Registration* page.**

4. Click **Register**.

   The *Registration Successful* page is displayed.

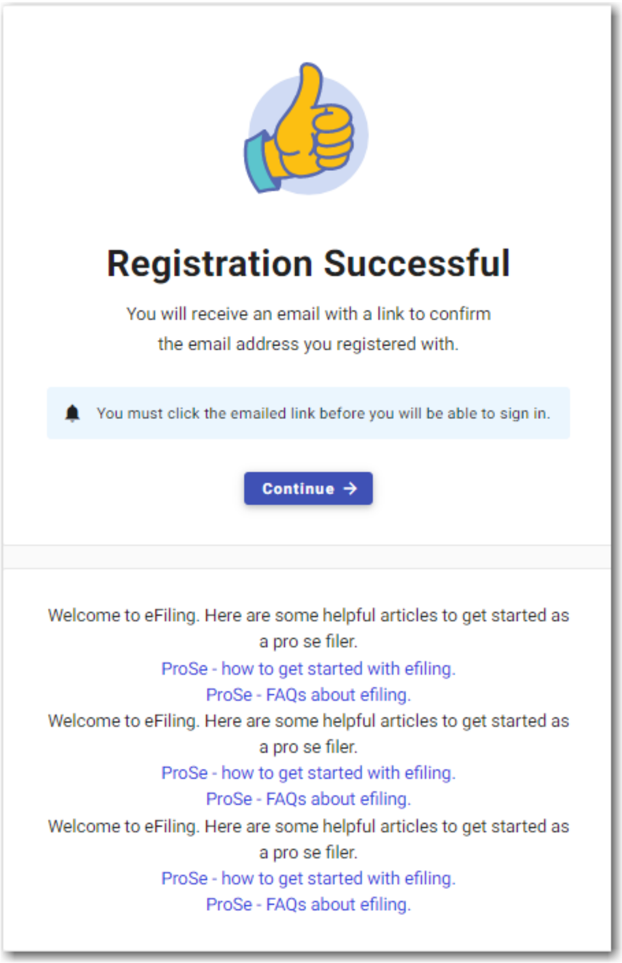



**Figure 4.3 – Registration Successful Page**

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.

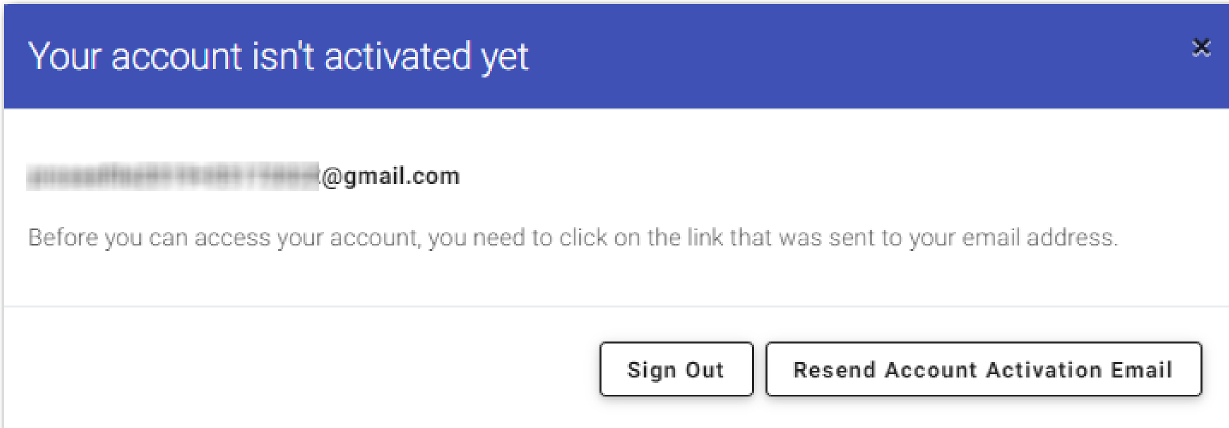



**Figure 4.4 – Example of Dialog Box for User Account Activation**

If you have not activated your account and you receive a reminder message to do so, click **Resend Account Activation Email**.

**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.

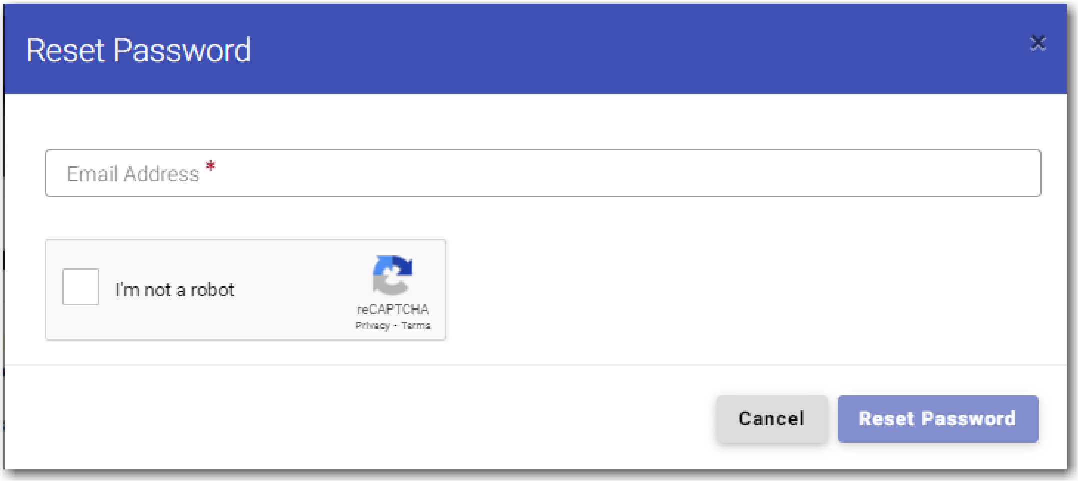



**Figure 4.5 – Reset Password Window**

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.

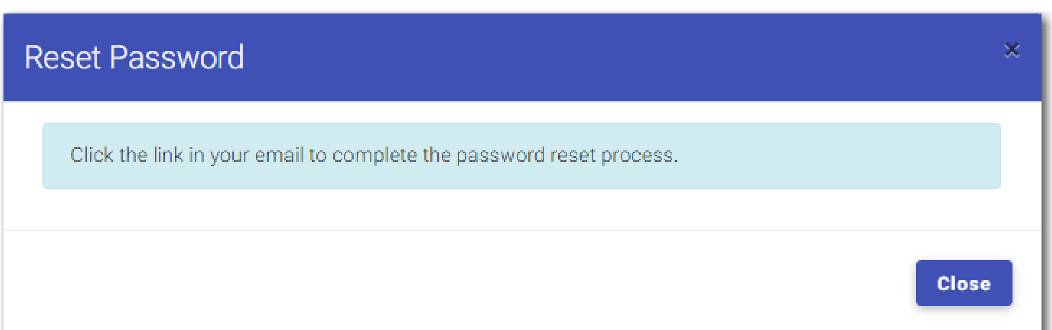
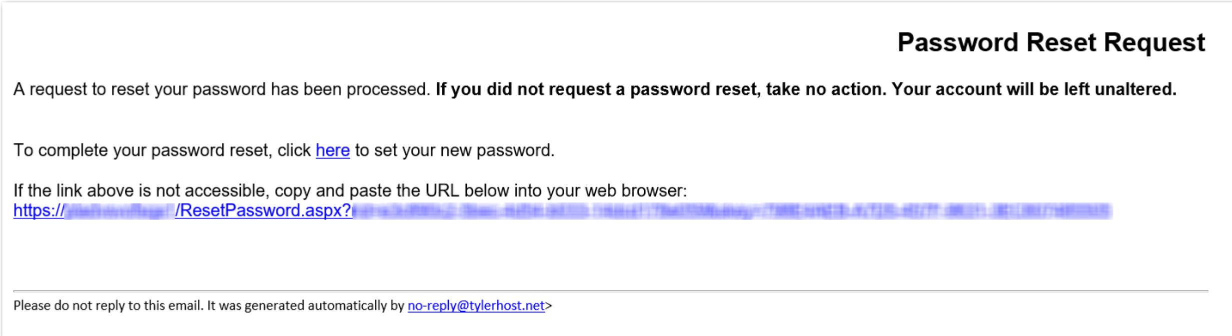



**Figure 4.6 – Reset Password Window—Complete Reset Process**

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



**Password Reset Request**

A request to reset your password has been processed. **If you did not request a password reset, take no action. Your account will be left unaltered.**

To complete your password reset, click here to set your new password.

If the link above is not accessible, copy and paste the URL below into your web browser:
https:// /ResetPassword.aspx?

Please do not reply to this email. It was generated automatically by no-reply@tylerhost.net>

**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 User Information

You can update your personal information.

To update your personal information:

1. On the Dashboard menu, click **My Information**.

   The *My Information* page is displayed.

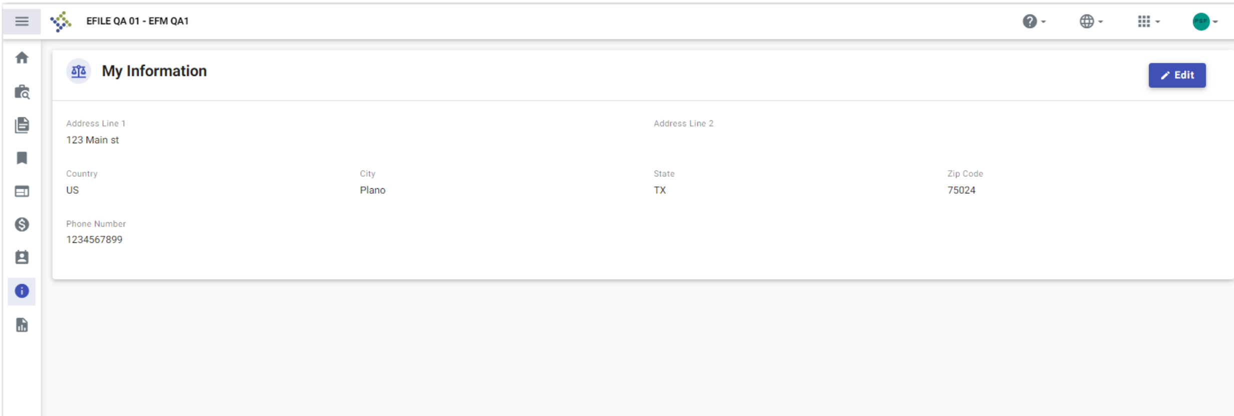



**Figure 4.8 – Example of a My Information Page**

2. Click 

to update your information.

   The *Edit My Information* window is displayed.

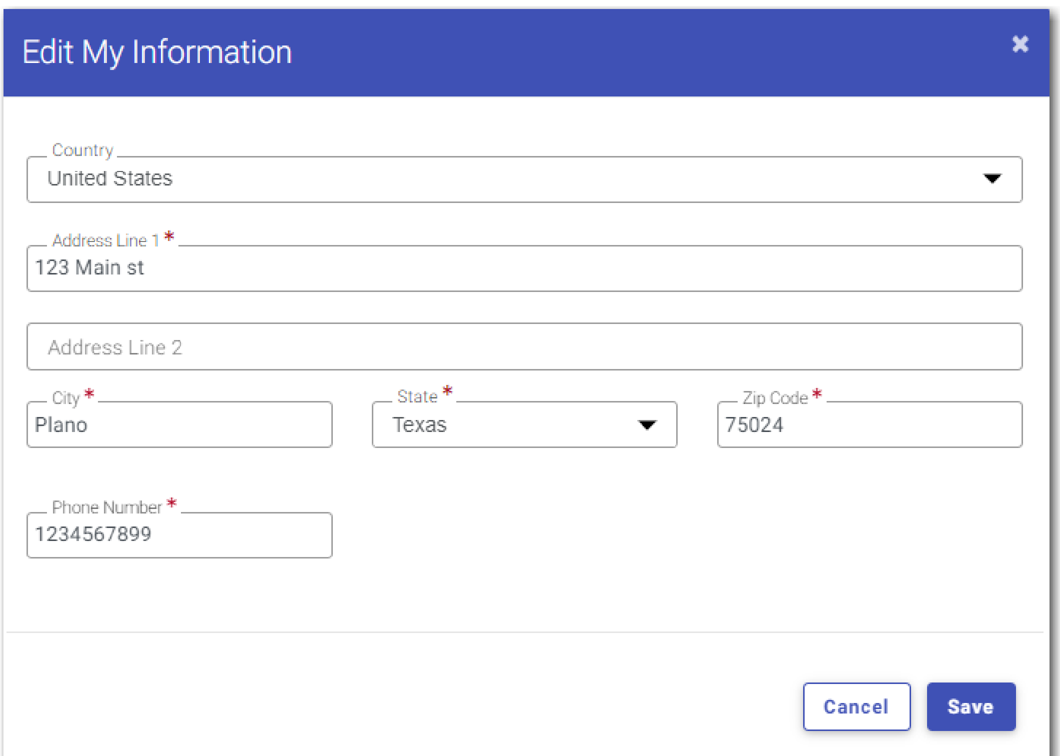



**Figure 4.9 – Example of an Edit My Information Window**

3. Update any information as needed, and then click 

.

# 5 Sign In and Sign Out

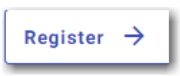
**Topics covered in this chapter**



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.

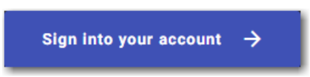
## Signing In

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).

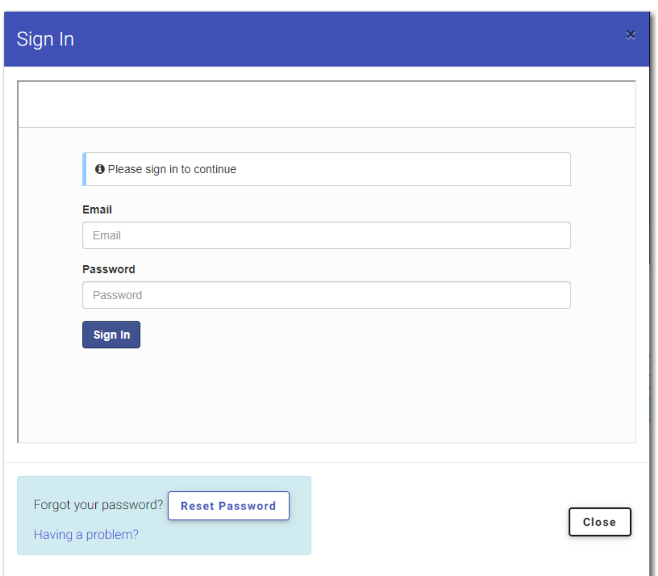



**Figure 5.1 – Example of a Sign In Page**

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.

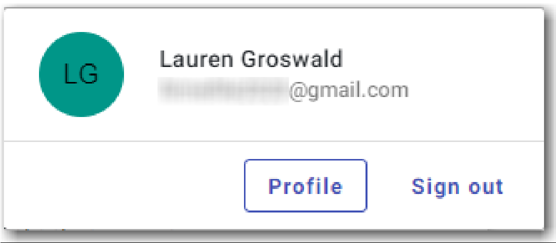



**Figure 5.2 – Manage Account Window**

2. Click  .


   You are now signed out of the application.

# 6 Manage Account

**Topics covered in this chapter**



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.

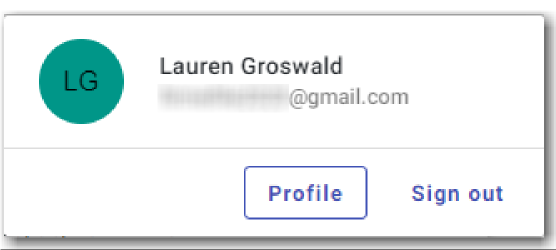
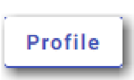



**Figure 6.1 – Example of a Manage Account Window**

2. Click 

.

   The *User Profile* page is displayed.

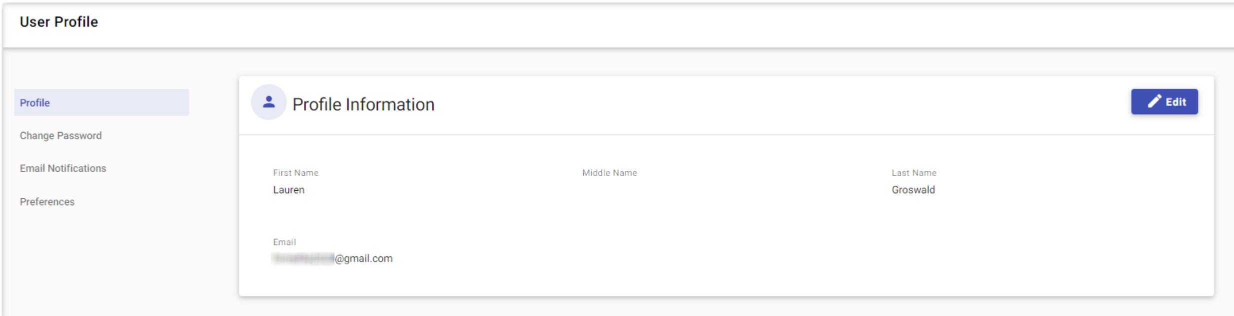



**Figure 6.2 – Example of a User Profile Page**

3. Verify that your information is correct. If you need to make changes, click 

.

   The *Edit Profile Information* window is displayed.

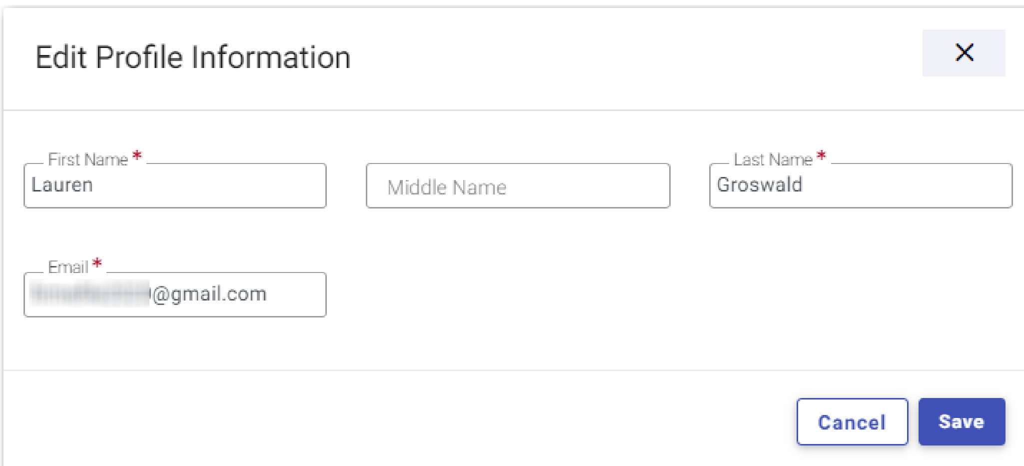



**Figure 6.3 – Example of an Edit Profile Information Window**

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.

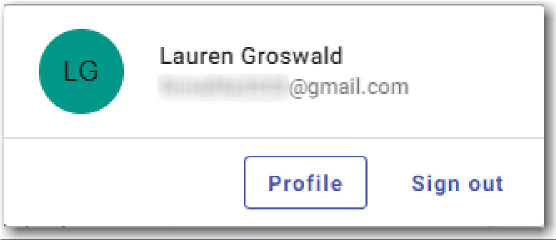
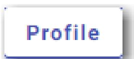



Figure 6.4 – Example of a Manage Account Window

2. Click .

   The *User Profile* page is displayed.

3. Click **Change Password**.

   The *Change Password* page is displayed.

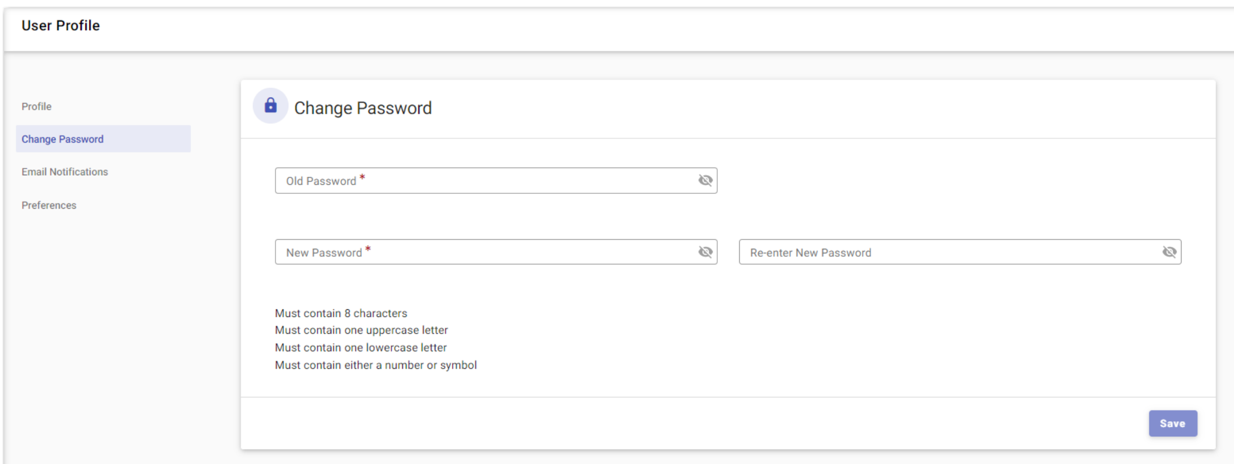



Figure 6.5 – Change Password Page

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.

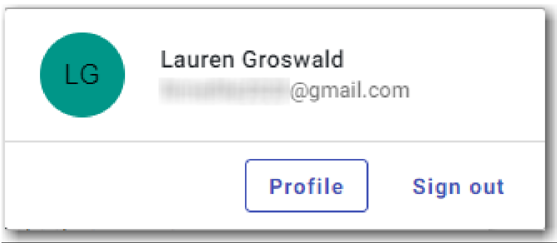
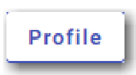



**Figure 6.6 – Example of a Manage Account Window**

2. Click .

   The *User Profile* page is displayed.

3. Click **Email Notifications**.

   The *Email Notifications* page is displayed.

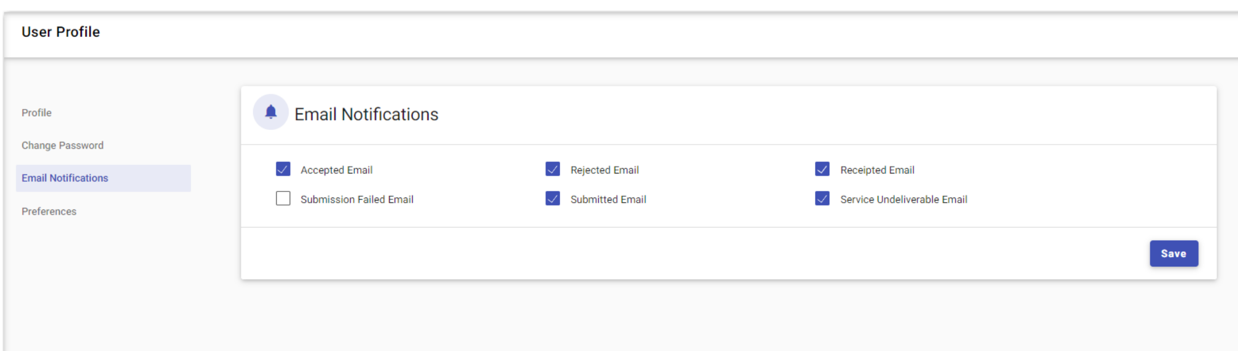



**Figure 6.7 – Example of an Email Notifications Page**

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.

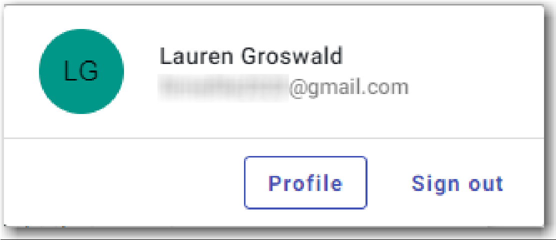
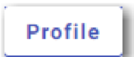



**Figure 6.8 – Example of a Manage Account Window**

2. Click .

   The *User Profile* page is displayed.

3. Click **Preferences**.

   The *Preferences* page is displayed.

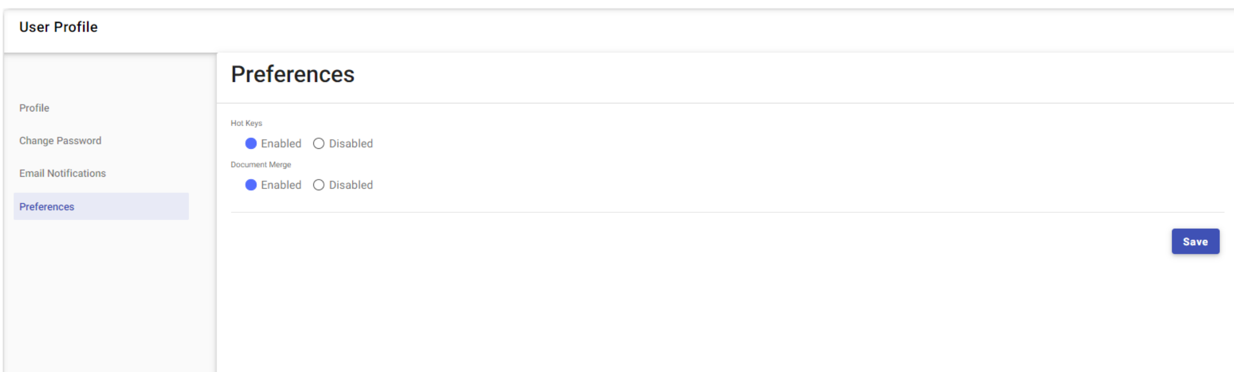



**Figure 6.9 – Example of a Preferences Page**

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 filer actions.

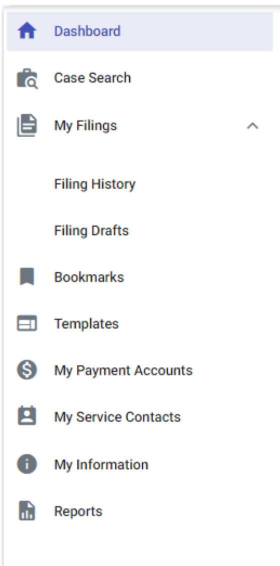



**Figure 7.1 – Example of a Dashboard**

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 *Payment Accounts* page to set up and manage payment accounts.
- Access the *Service Contacts* page to add and manage your service contacts list.
- View and update your profile information on the *My Information* page.
- Access the *Reports* page to generate reports for envelopes and filings that you submitted.

# Dashboard Page

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

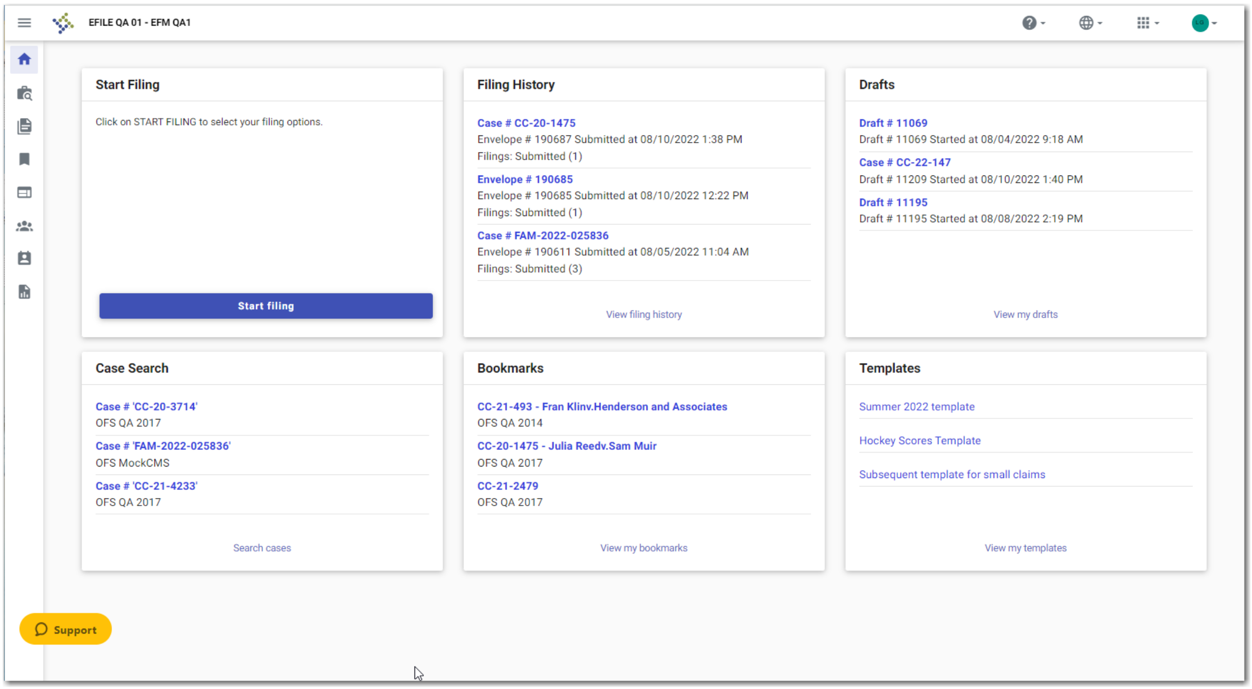



**Figure 7.2 – Example of a Dashboard Page**

### Account Setup

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

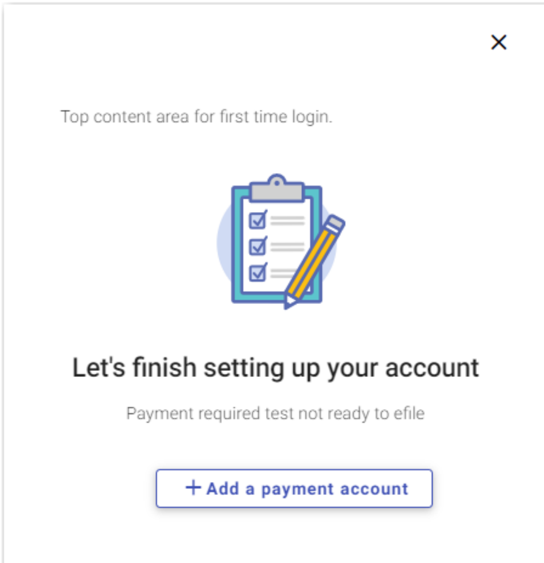



**Figure 7.3 – Warning Message**

Click   . The *Payment Accounts* page is displayed.

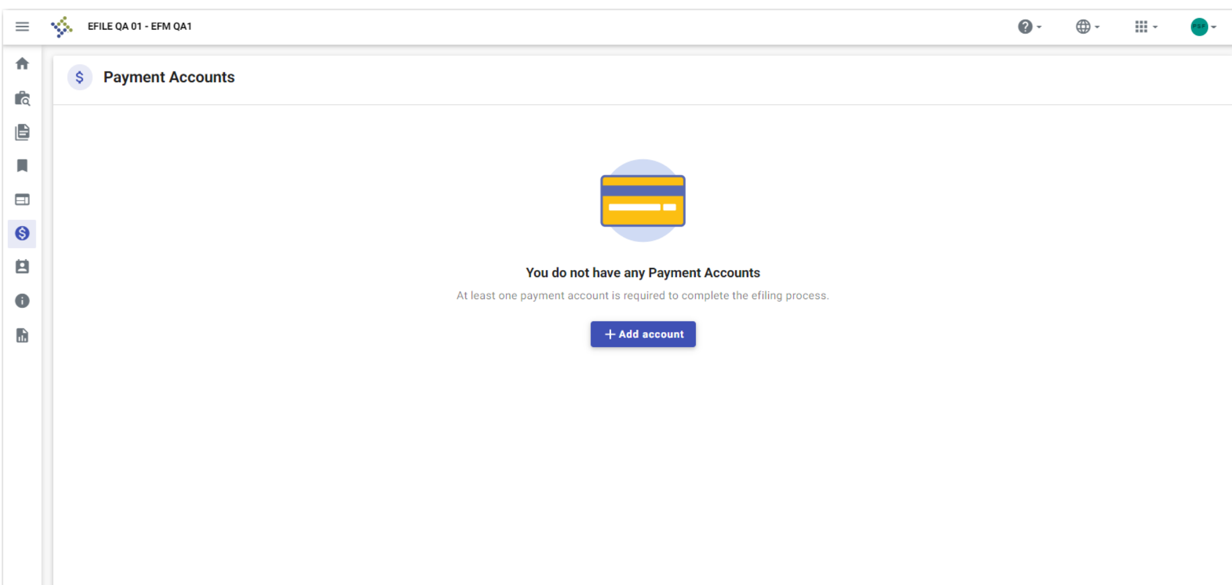



**Figure 7.4 – Payment Accounts Page for Account Setup**

Click   . The *Add Payment Account* window is displayed.

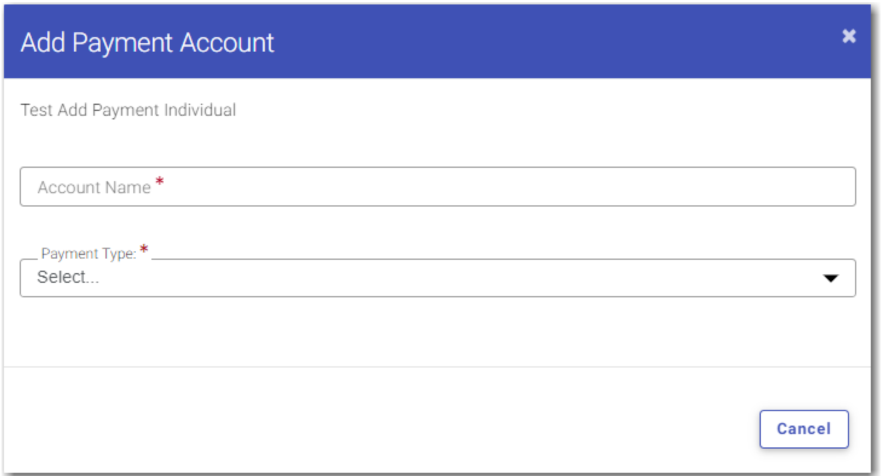


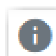

**Figure 7.5 – Add Payment Account Window**

Follow the steps to set up a payment account. Refer to Payment Accounts, page 40 for more information.

**Start Filing**

Click 

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

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

**Filing History**

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

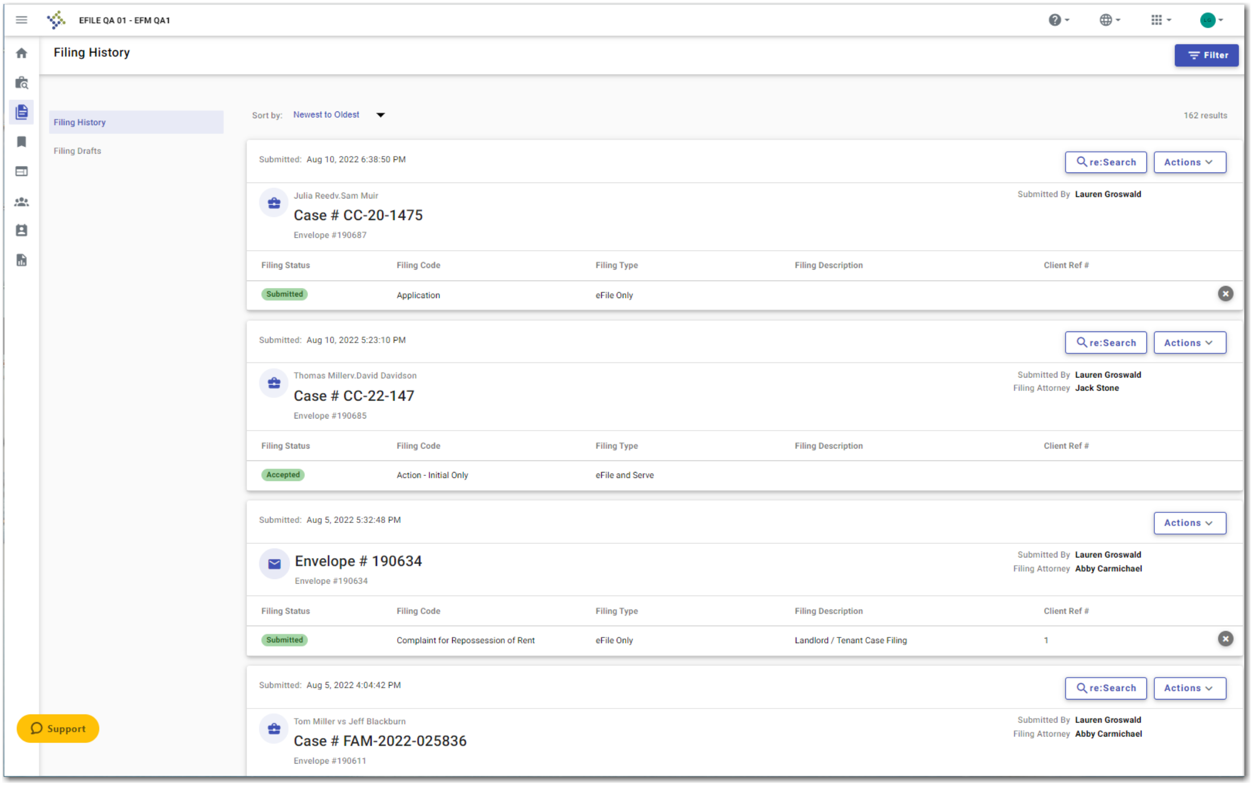



**Figure 7.6 – Example of a Filing History Page**

### Drafts

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

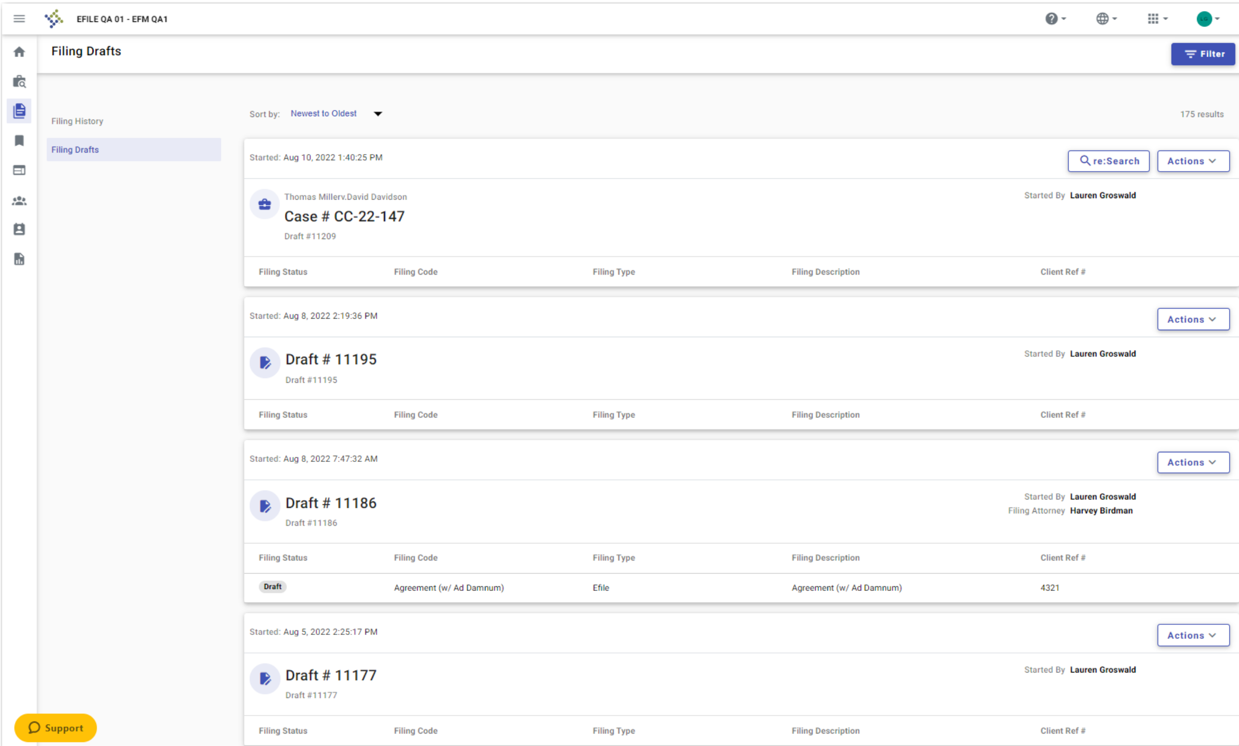



**Figure 7.7 – Example of a Filing Drafts Page**

### 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.

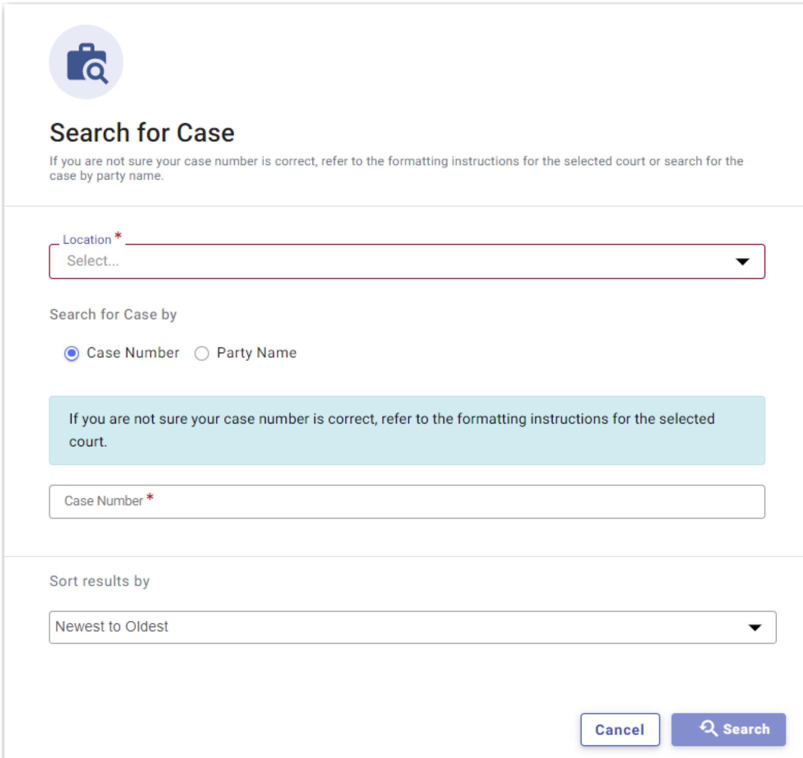



**Figure 7.8 – Example of a Search for Case Page**

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

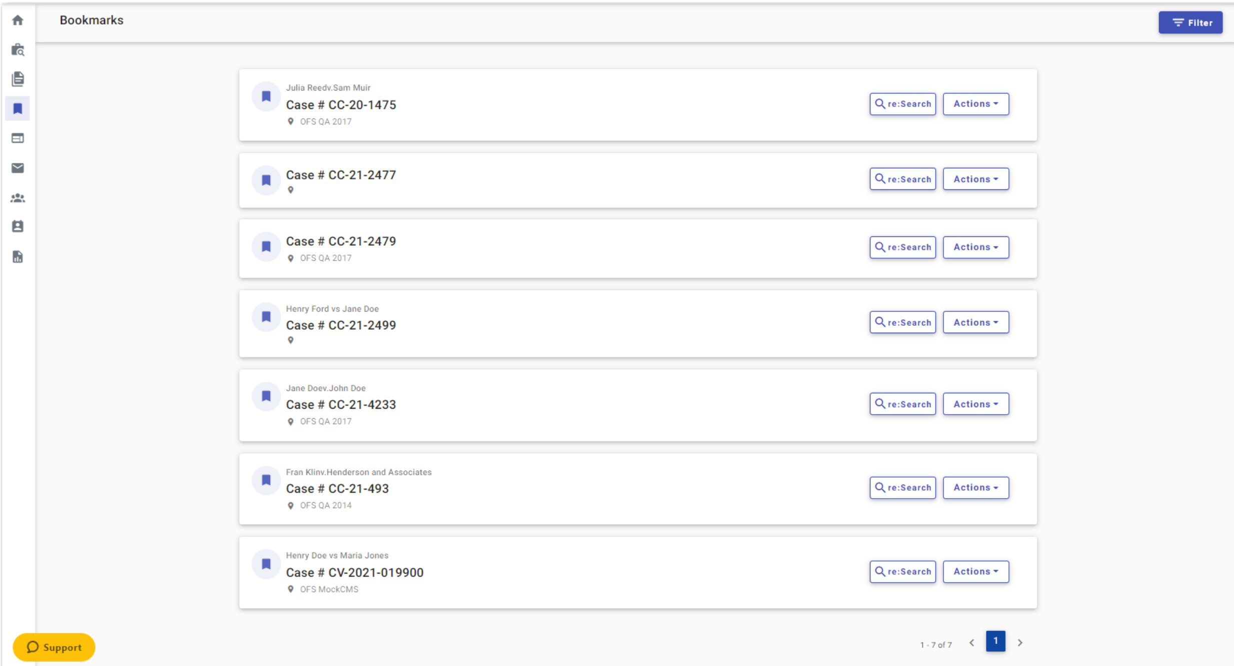



Figure 7.9 – Example of a Bookmarks Page

## Templates

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

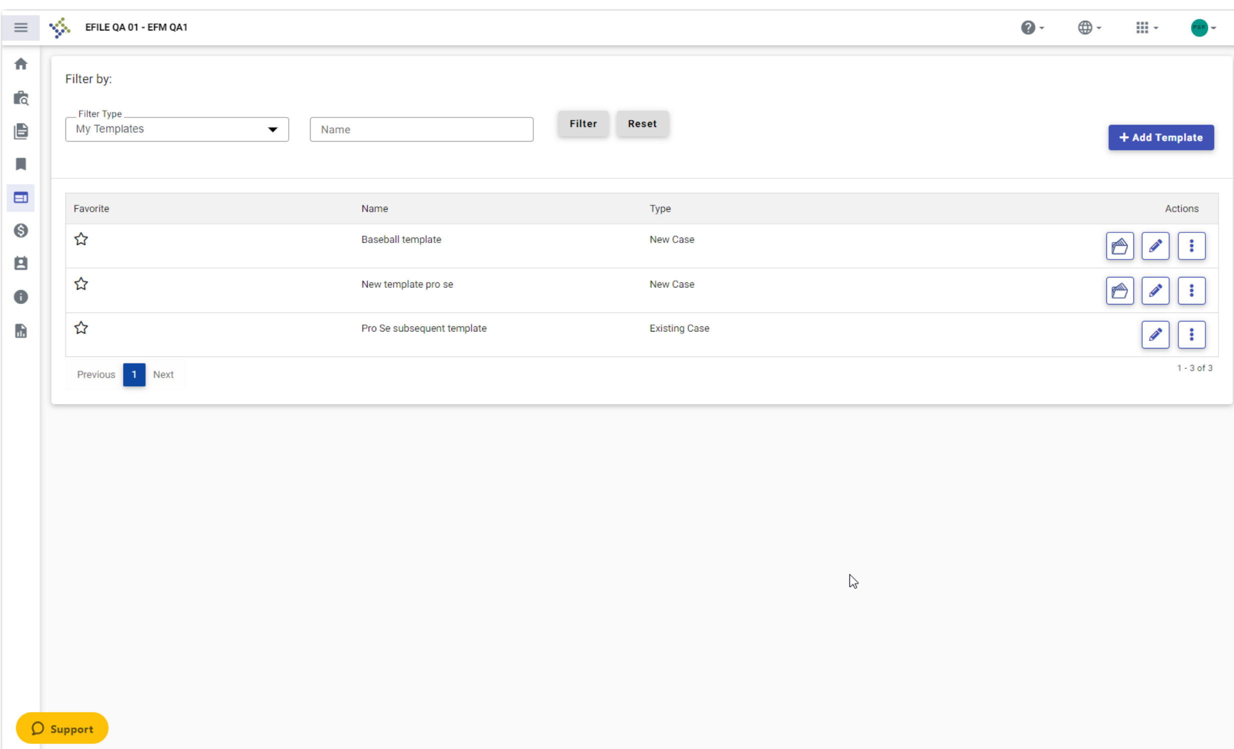



Figure 7.10 – Example of a Templates Page

# 8 Payment Accounts

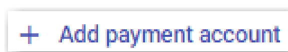
**Topics covered in this chapter**

♦ 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 to submit a filing 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 **My Payment Accounts**. The *Payment Accounts* page opens. On that page, you can manage your payment accounts. You can add a new account, edit an existing account, or delete an existing account.

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 **My Payment Accounts**.

   The *Payment Accounts* page is displayed.

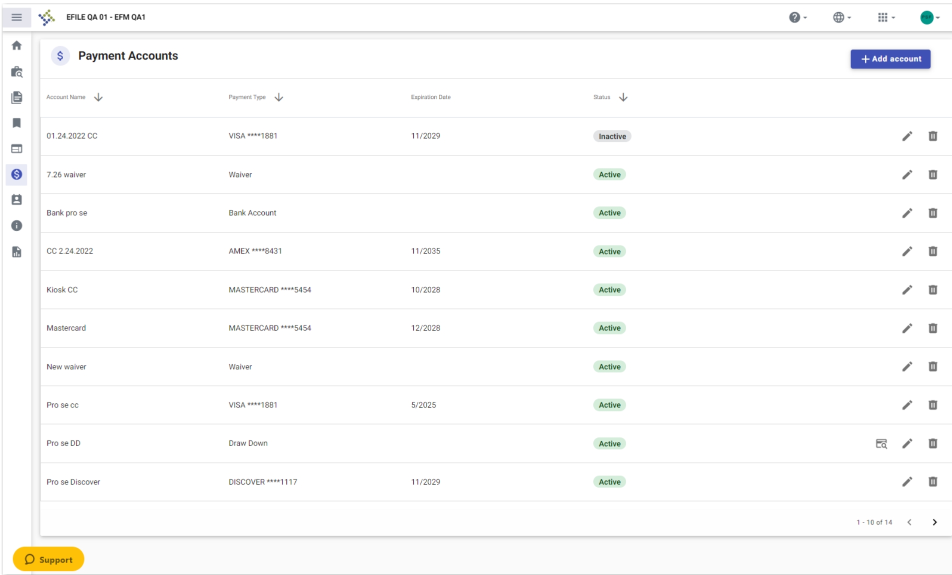



**Figure 8.1 – Example of a Payment Accounts Page**

2. Click 

.

   The *Add Payment Account* window is displayed.

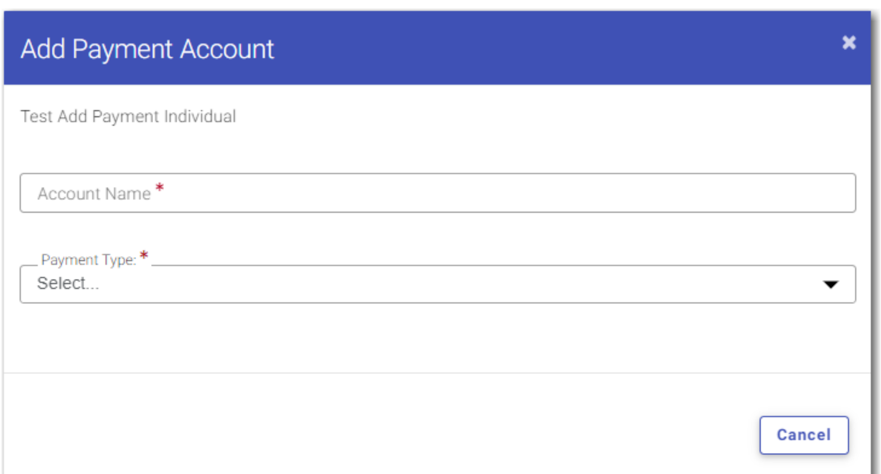



**Figure 8.2 – Add Payment Account Window**

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

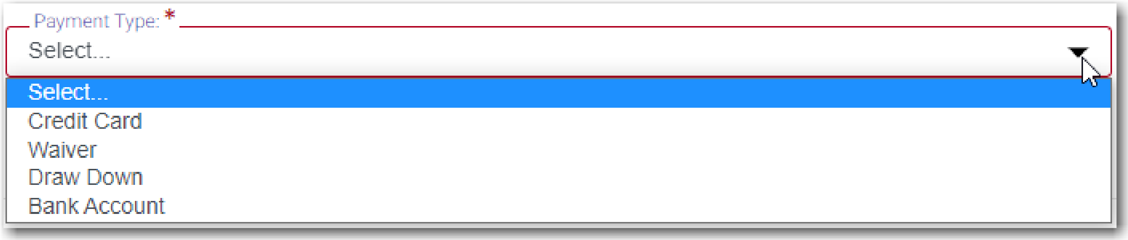



**Figure 8.3 – Payment Type Drop-Down List**

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

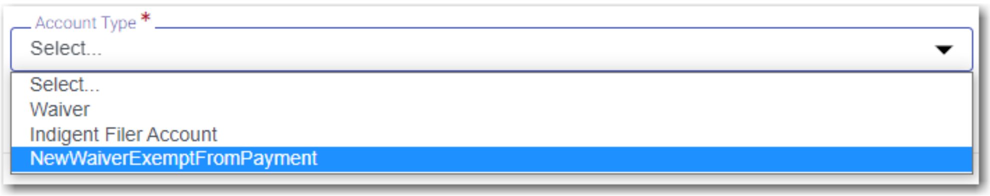



**Figure 8.4 – Account Type Drop-Down List for Waivers**

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 **My Payment Accounts**.

   The *Payment Accounts* page is displayed.

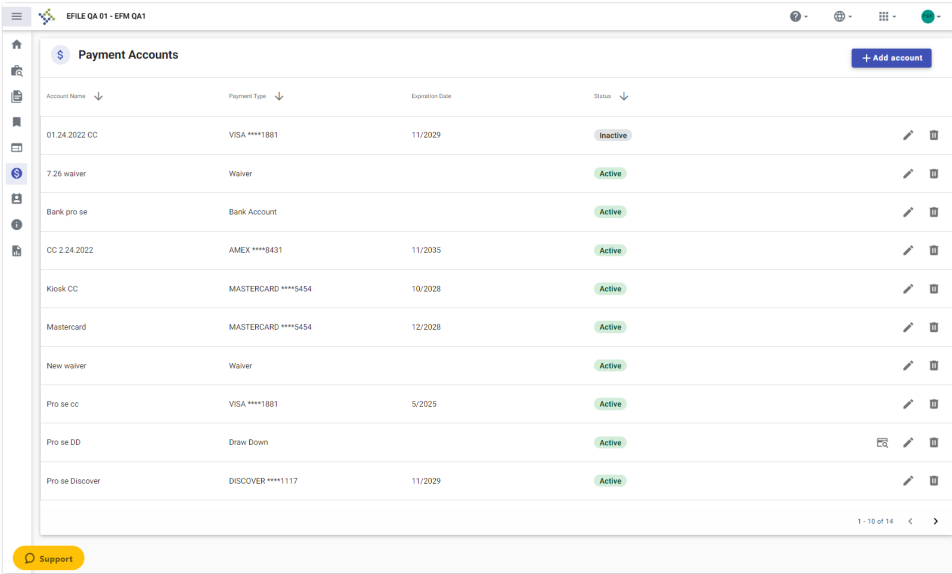



Figure 8.5 – Example of a Payment Accounts Page

2. Click 

.

   The *Add Payment Account* window is displayed.

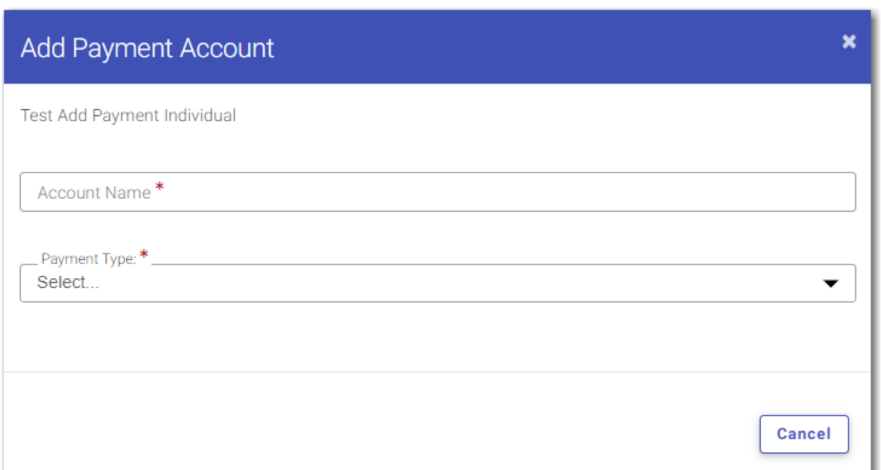



Figure 8.6 – Add Payment Account Window

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

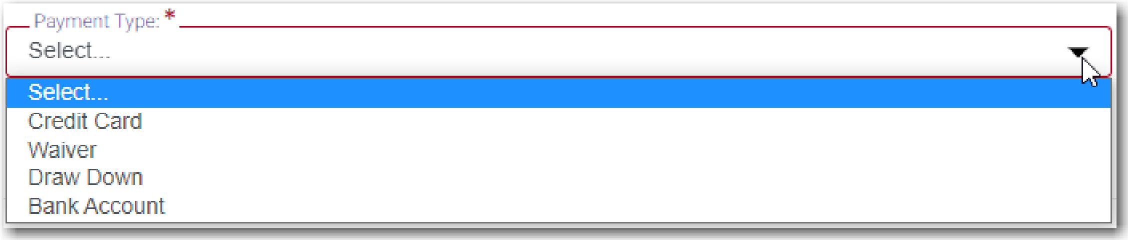



**Figure 8.7 – Payment Type Drop-Down List**

5. Click 

.

   The *Enter Information* window is displayed.

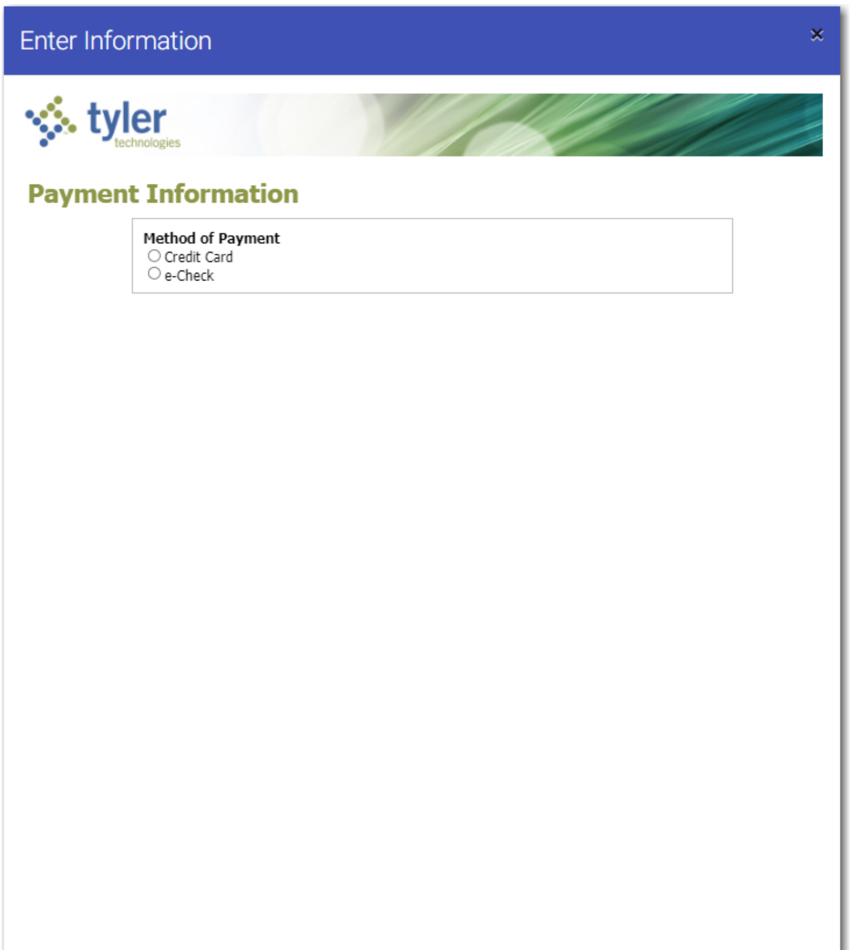



**Figure 8.8 – Enter Information Window**

6. Select **Credit Card**.

   The Payment Information pane is displayed.

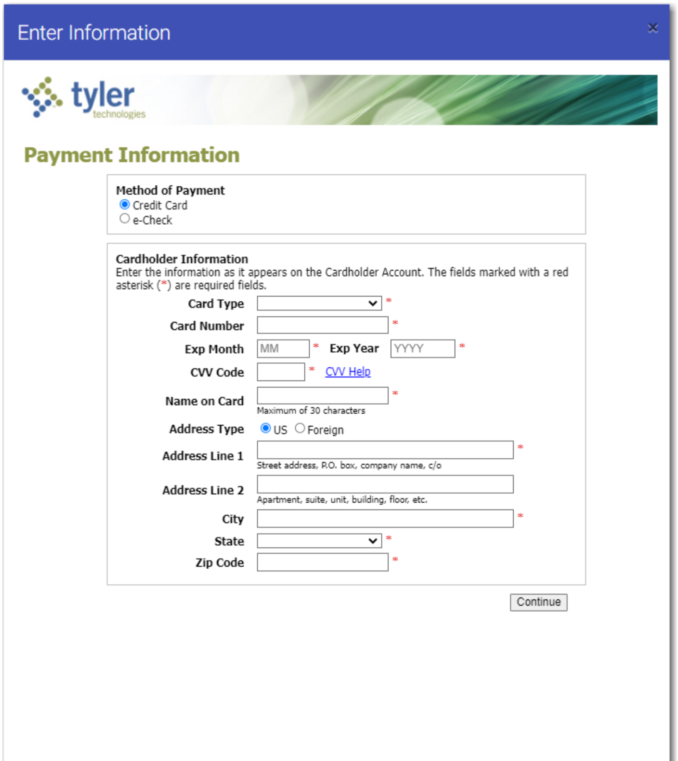



**Figure 8.9 – Payment Information Pane**

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 Continue.

    The Verify Billing Information pane is displayed.

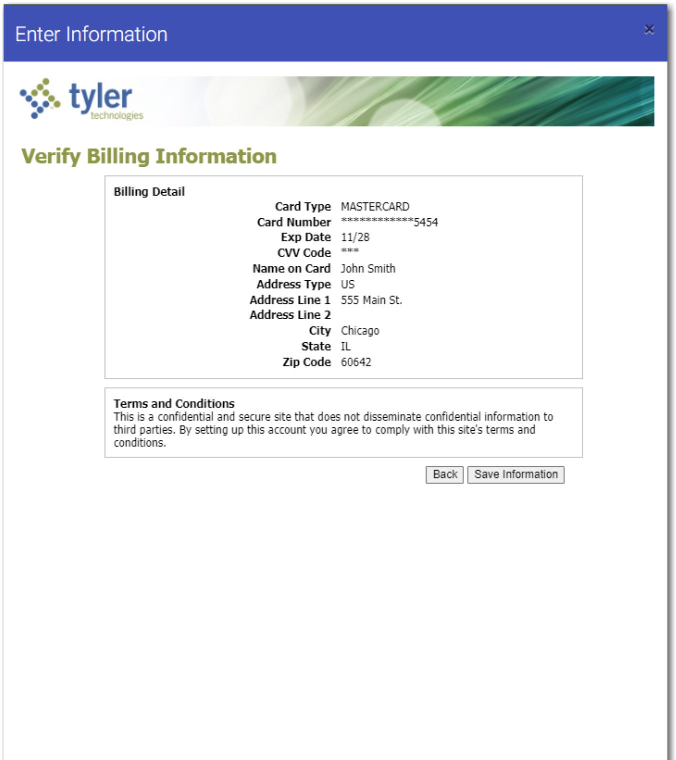



**Figure 8.10 – Verify Billing Information Pane**

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

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

# Adding an E-Check Payment Account

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

To set up an e-check payment account:

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

   The *Payment Accounts* page is displayed.

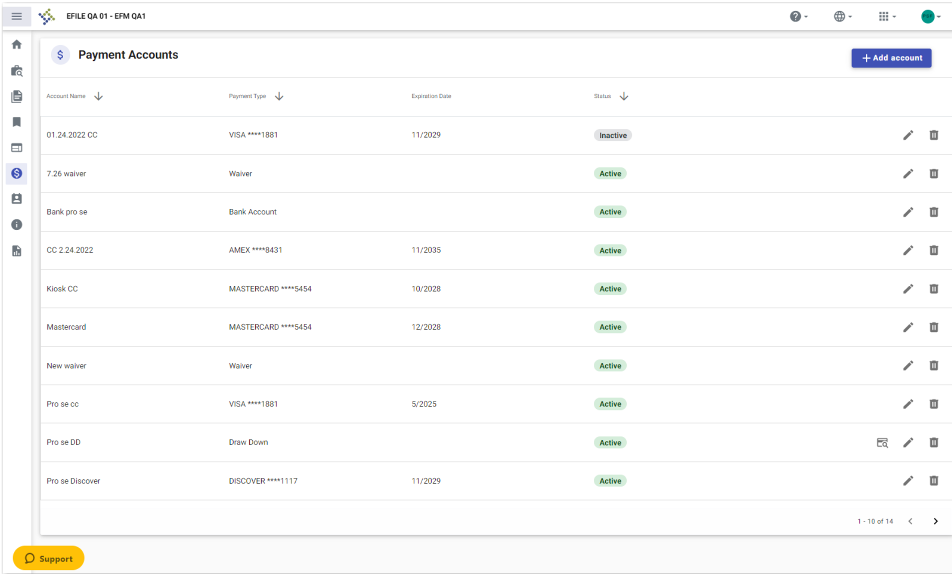



Figure 8.11 – Example of a Payment Accounts Page

2. Click 

.

The *Add Payment Account* window is displayed.

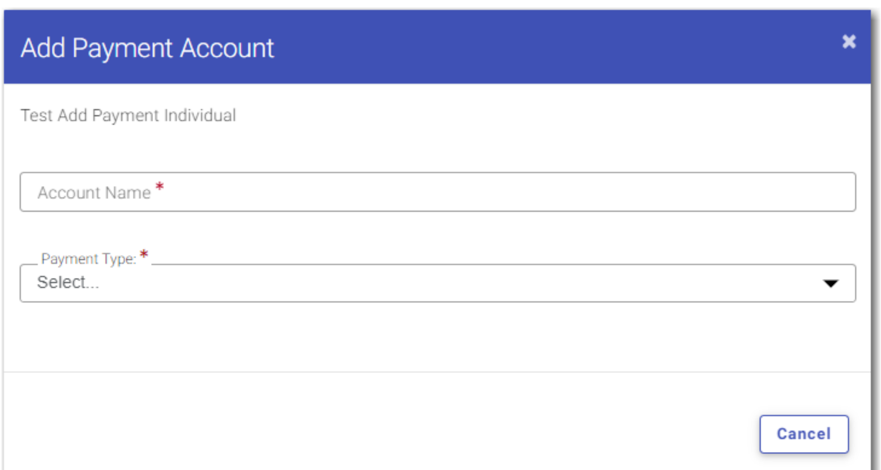



Figure 8.12 – Add Payment Account Window

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

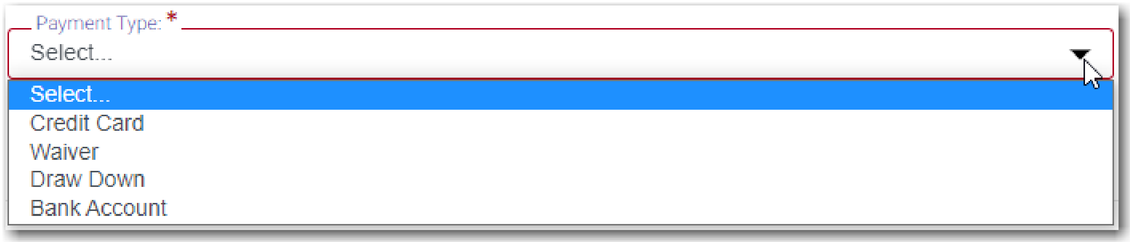



**Figure 8.13 – Payment Type Drop-Down List**

5. Click   .

   The *Enter Information* window is displayed.

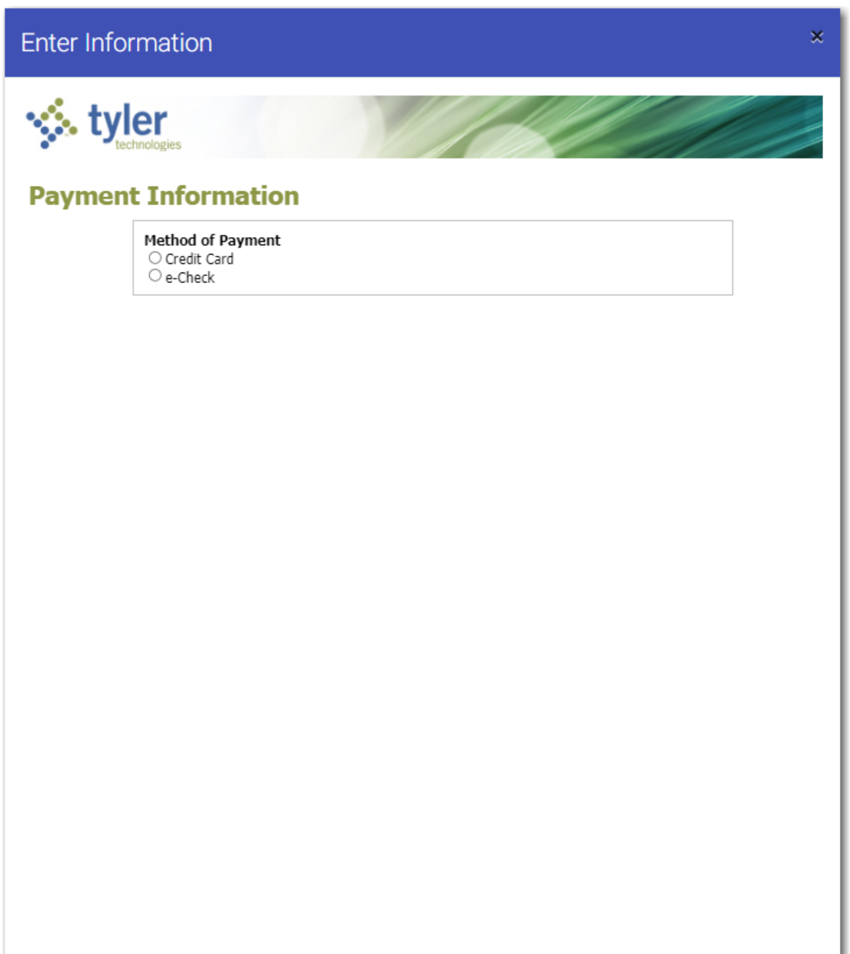



**Figure 8.14 – Enter Information Window**

6. Select **e-Check**.

   The Payment Information pane is displayed.

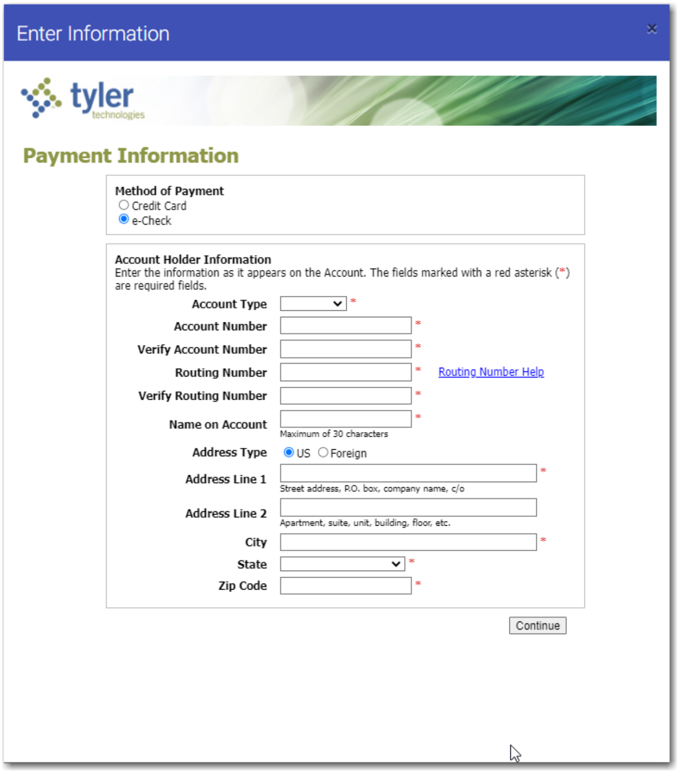



**Figure 8.15 – Payment Information Pane**

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.

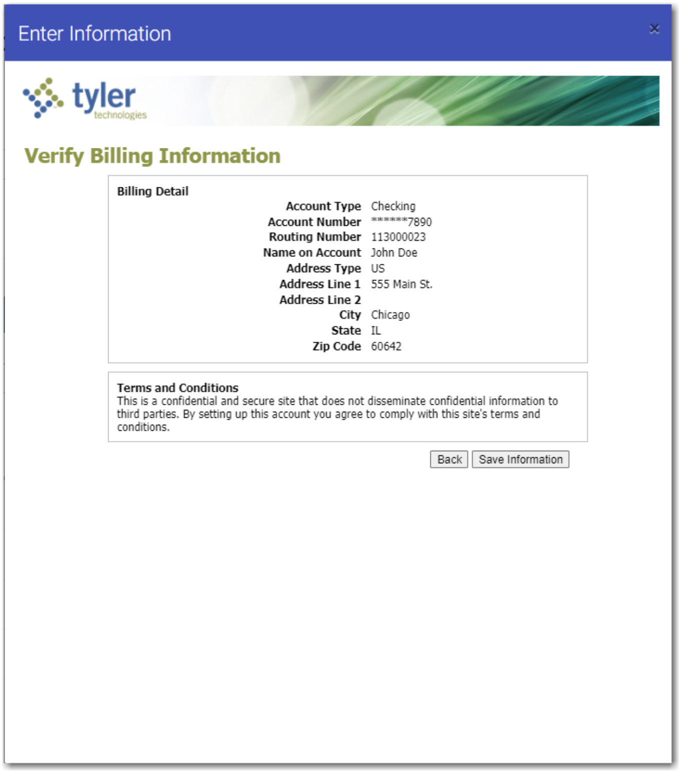



**Figure 8.16 – Verify Billing Information Pane**

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

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

# 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 **My Payment Accounts**.

   The *Payment Accounts* page is displayed.

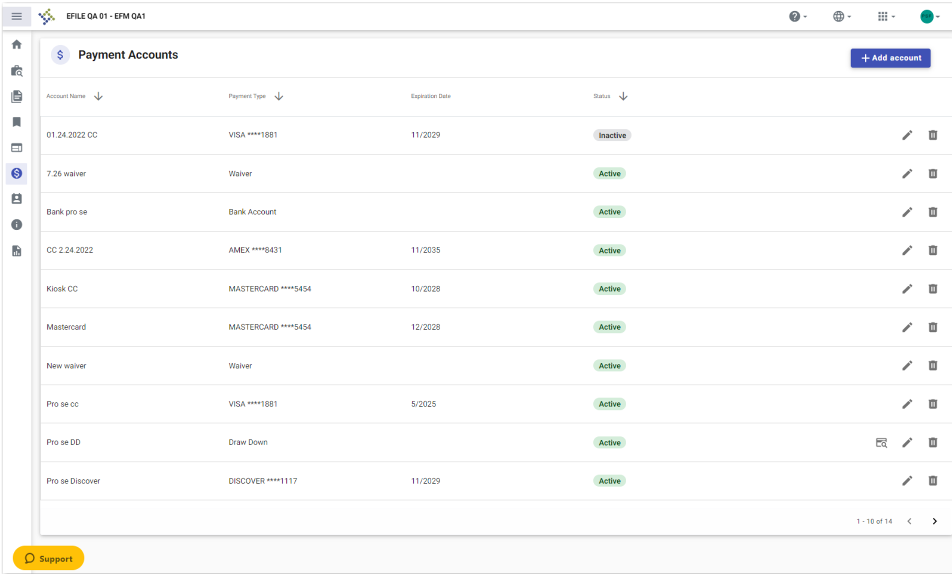



**Figure 8.17 – Example of a Payment Accounts Page**

2. Click 

.

   The *Add Payment Account* window is displayed.

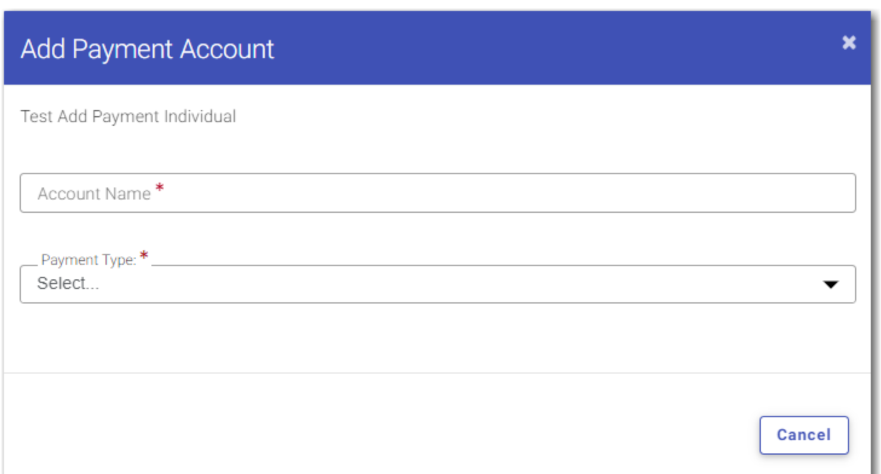



**Figure 8.18 – Add Payment Account Window**

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

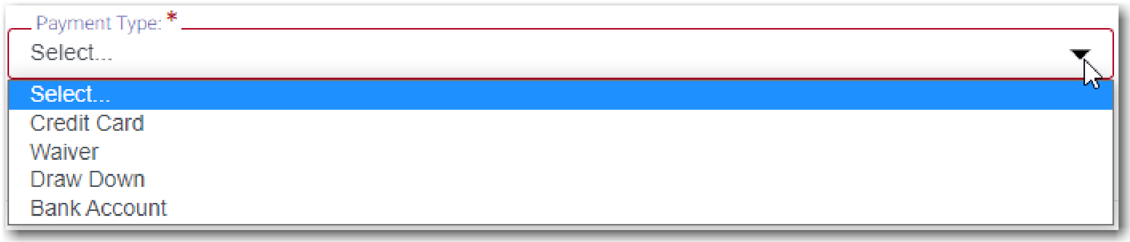



**Figure 8.19 – Payment Type Drop-Down List**

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

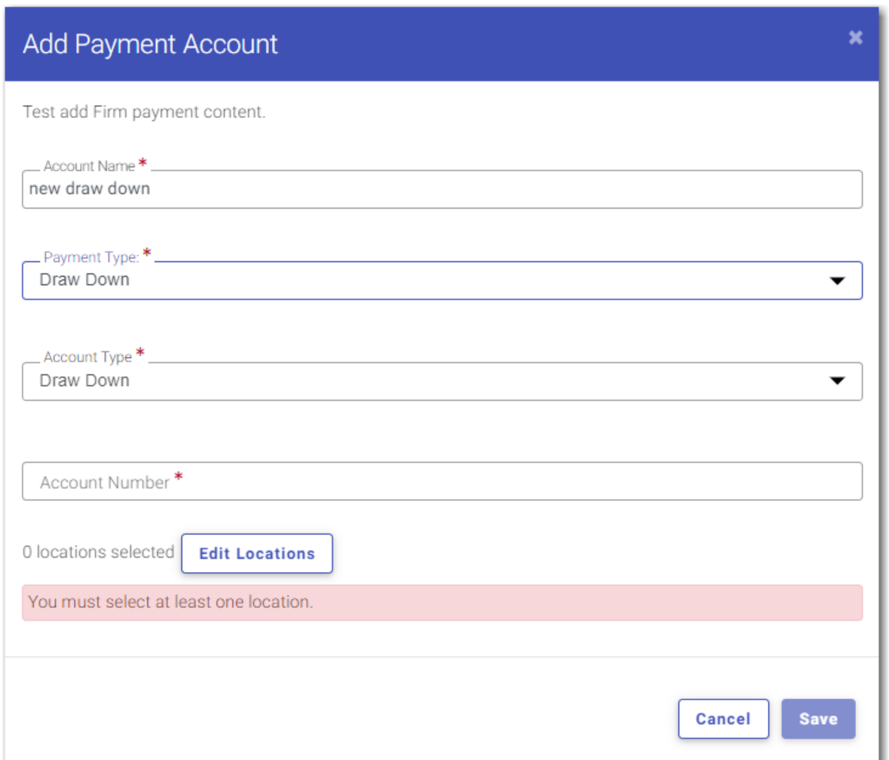



**Figure 8.20 – Example of Additional Fields in the Add Payment Account Window**

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.

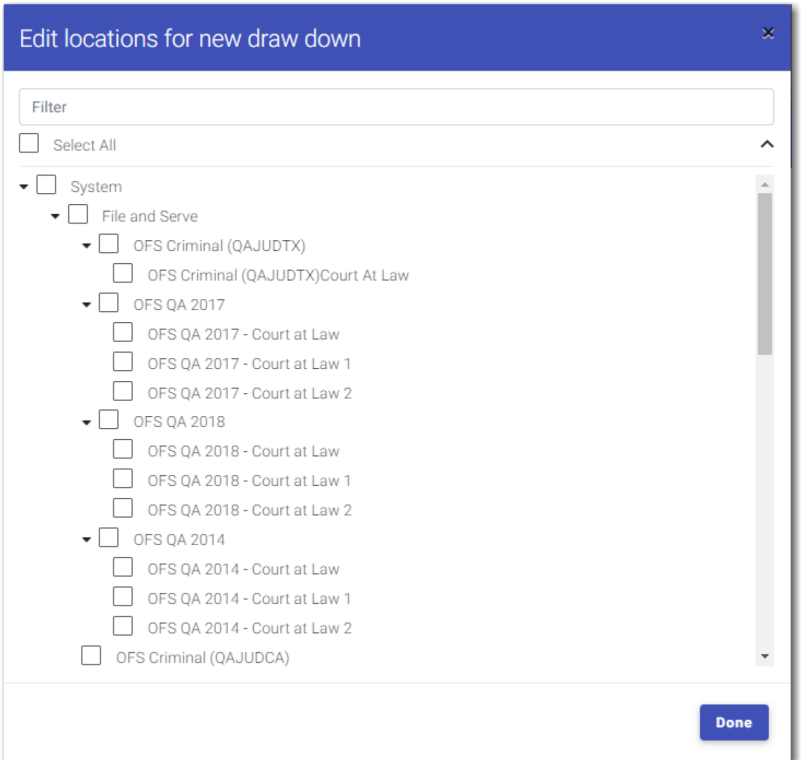



**Figure 8.21 – Example of the Edit Locations for New Draw Down Window**

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

.

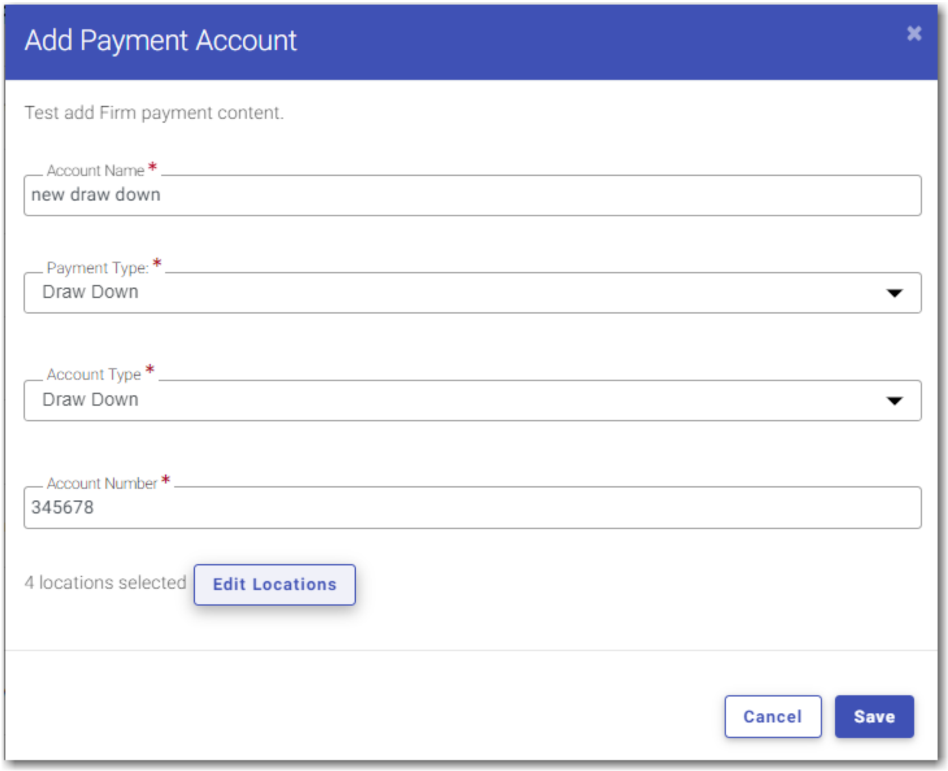



**Figure 8.22 – Example of an Add Payment Account Window with the New Draw-Down Account Created**

9. Click  .


The *Balance for Draw down* window is displayed.

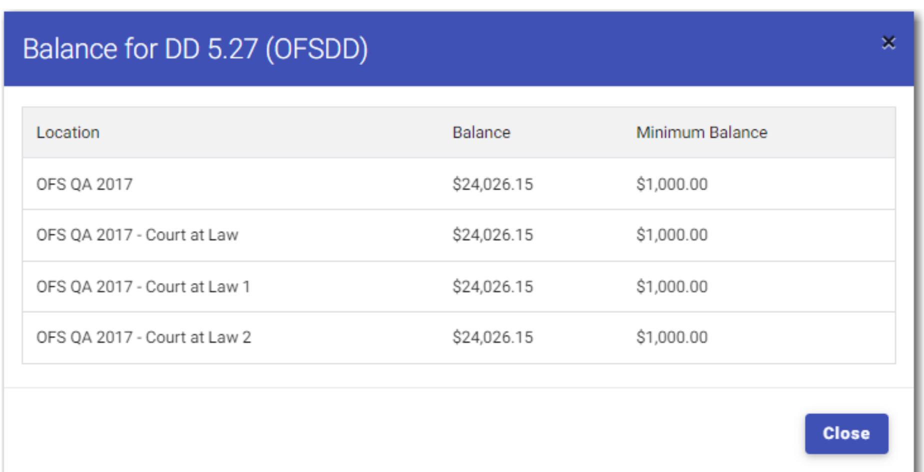



**Figure 8.23 – Example of a Balance for Draw Down Window**

**Note: You can click  from the *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 

.

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 **My Payment Accounts**.

   The *Payment Accounts* page is displayed.

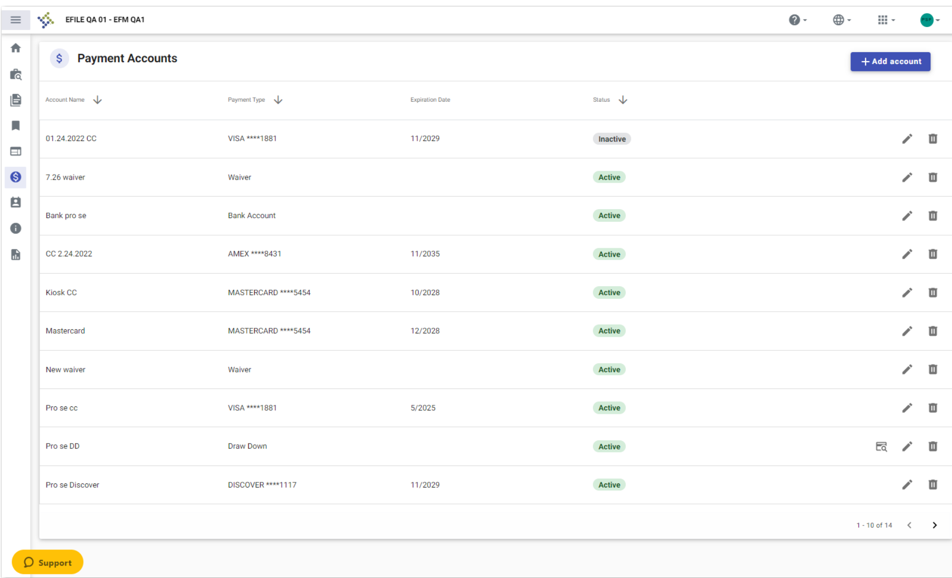



**Figure 8.24 – Example of a Payment Accounts Page**

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.

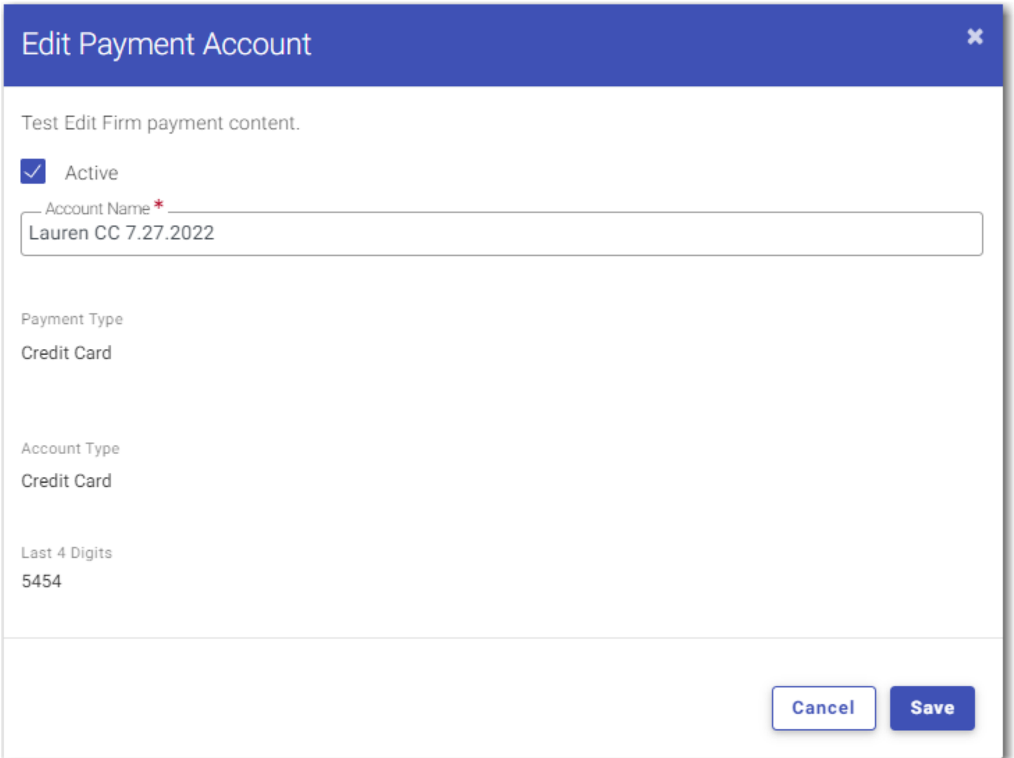
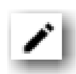



**Figure 8.25 – Example of an Edit Payment Account Window**

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

3. 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. Then, click .

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

4. To return the payment account to 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:

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

   The *Payment Accounts* page is displayed.

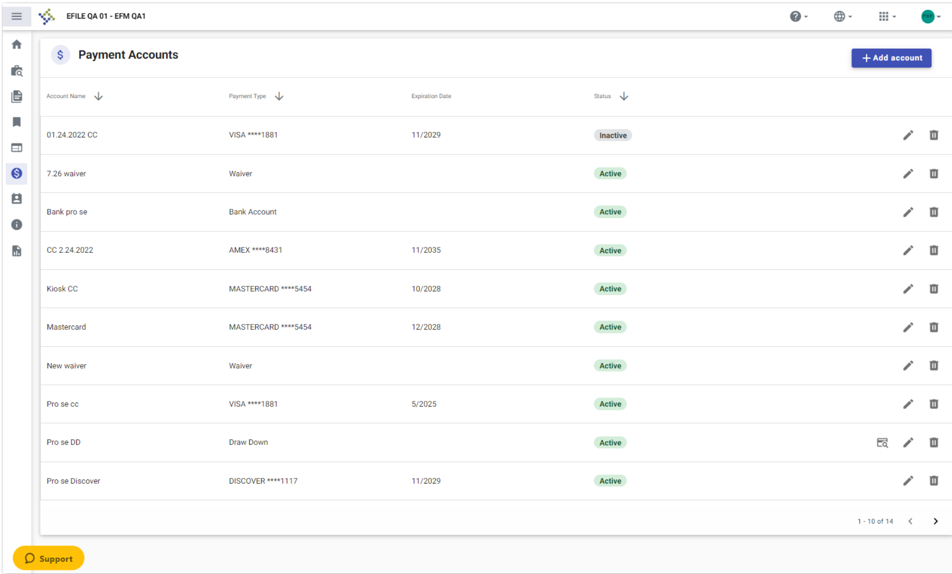



**Figure 8.26 – Example of a Payment Accounts Page**

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

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

# 9 Case Initiation

**Topics covered in this chapter**



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.**

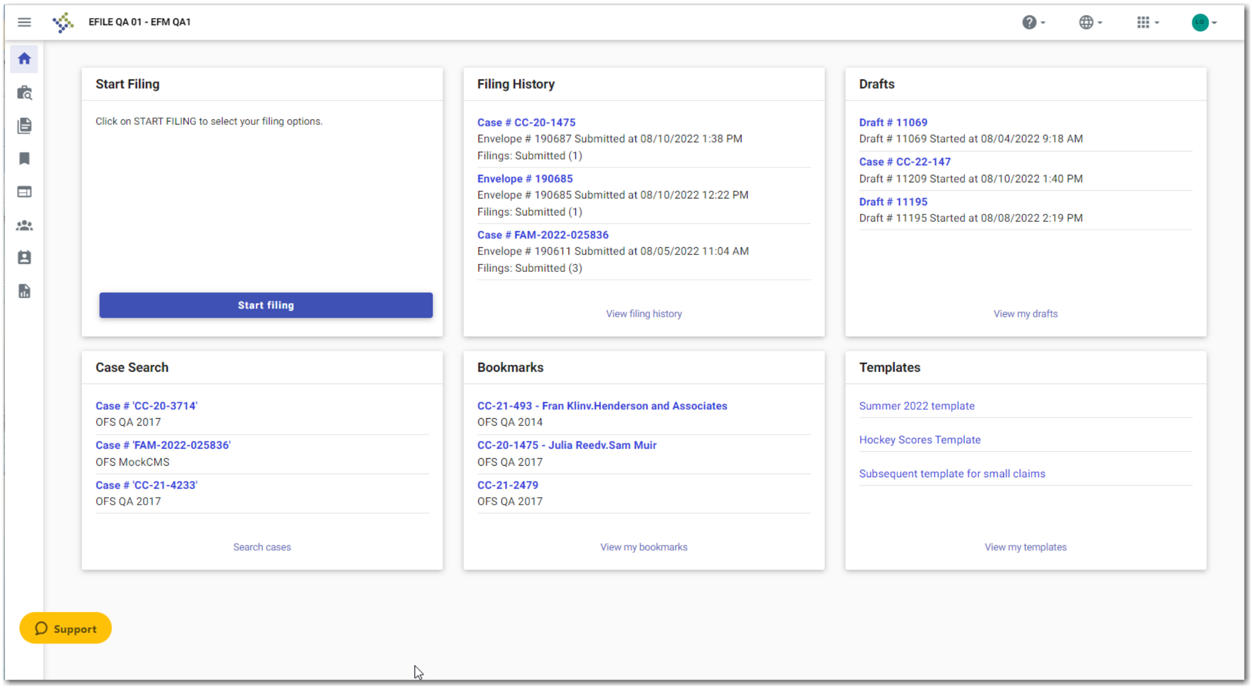



**Figure 9.1 – Example of a Dashboard Page**

# 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 

.

   The *Start Filing* page is displayed.

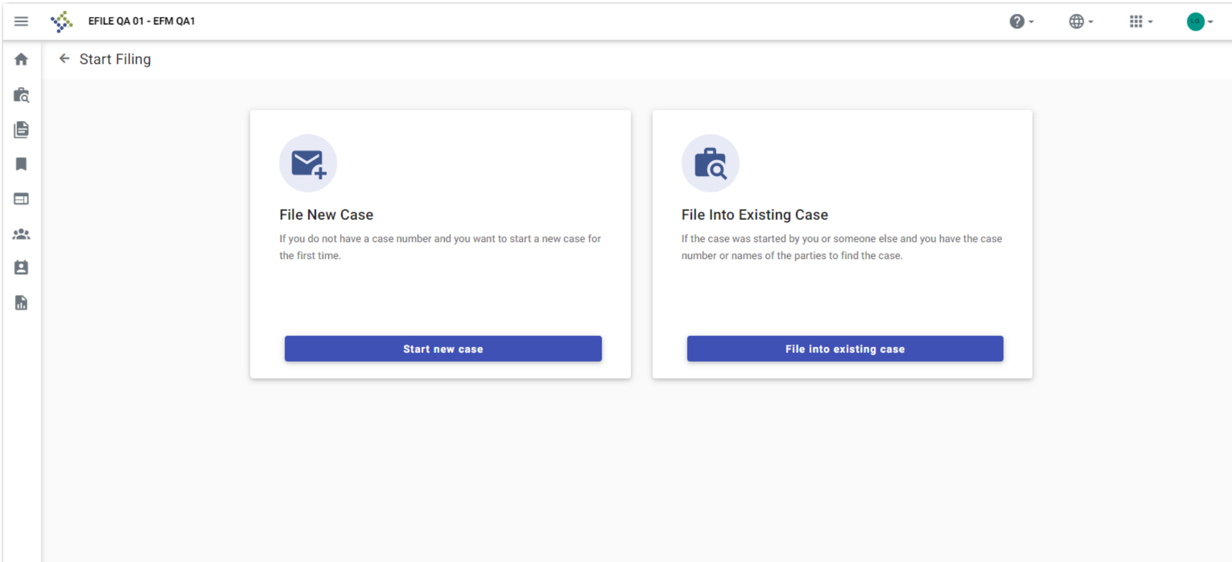



**Figure 9.2 – Start Filing Page**

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.

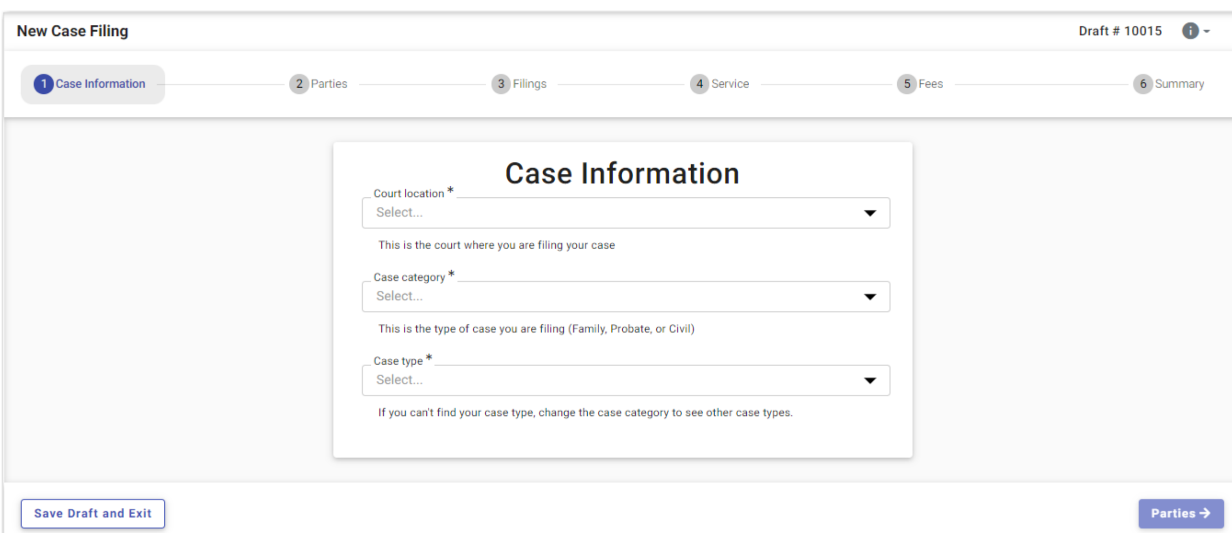



**Figure 9.3 – Case Information Page**

**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 Parties → to save your work and continue, or click Save Draft and Exit 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 Start filing .

   The *Start Filing* page is displayed.

2. Click Start new case .

   The *Case Information* page is displayed.

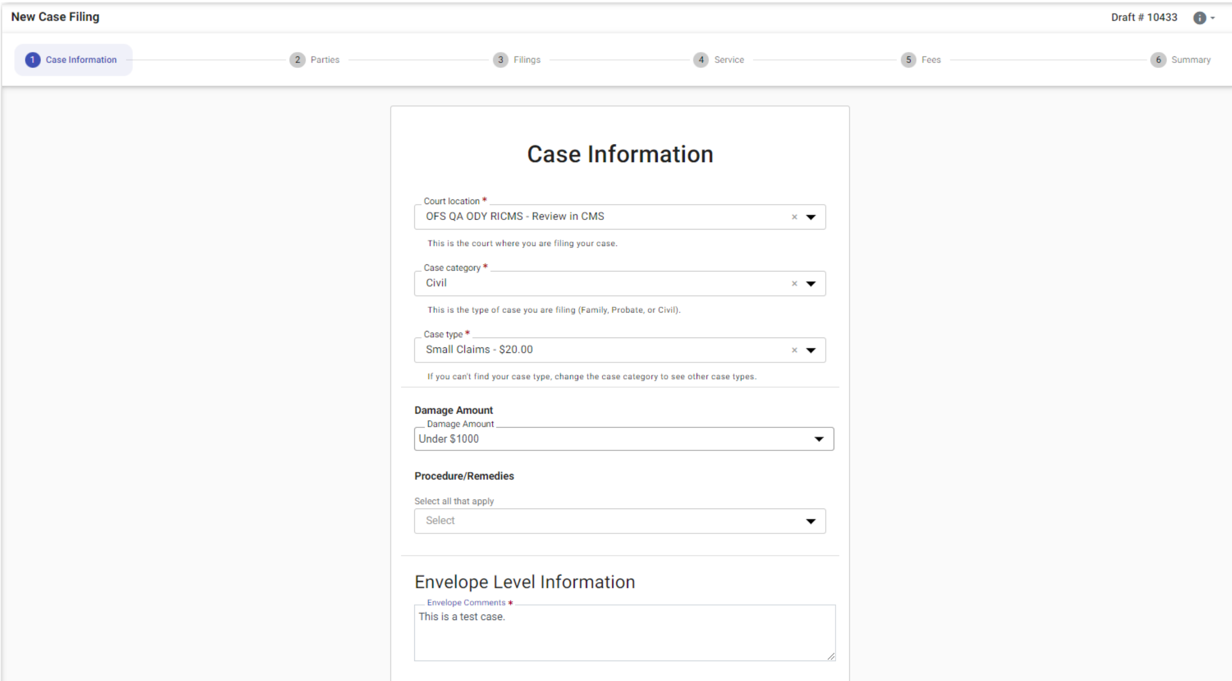



**Figure 9.4 – Example of a Case Information Page**

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.**

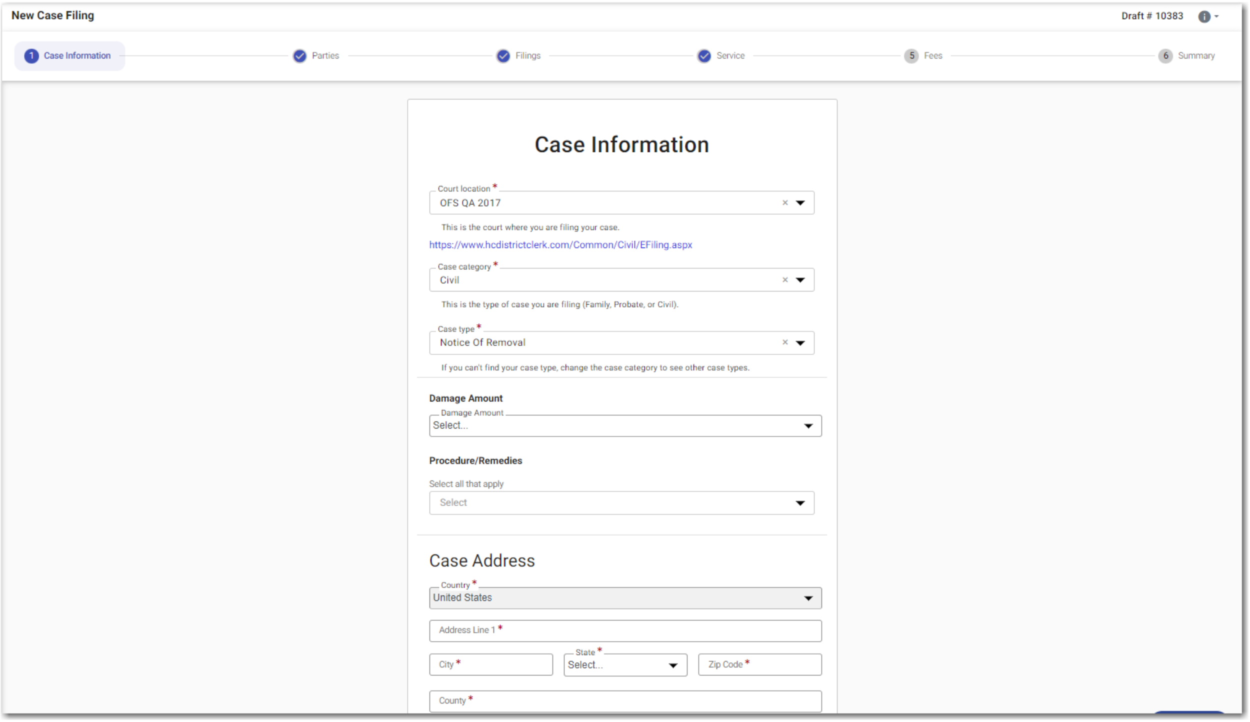



**Figure 9.5 – Example of a Case Information Page—Blank Case Address Pane**

**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.

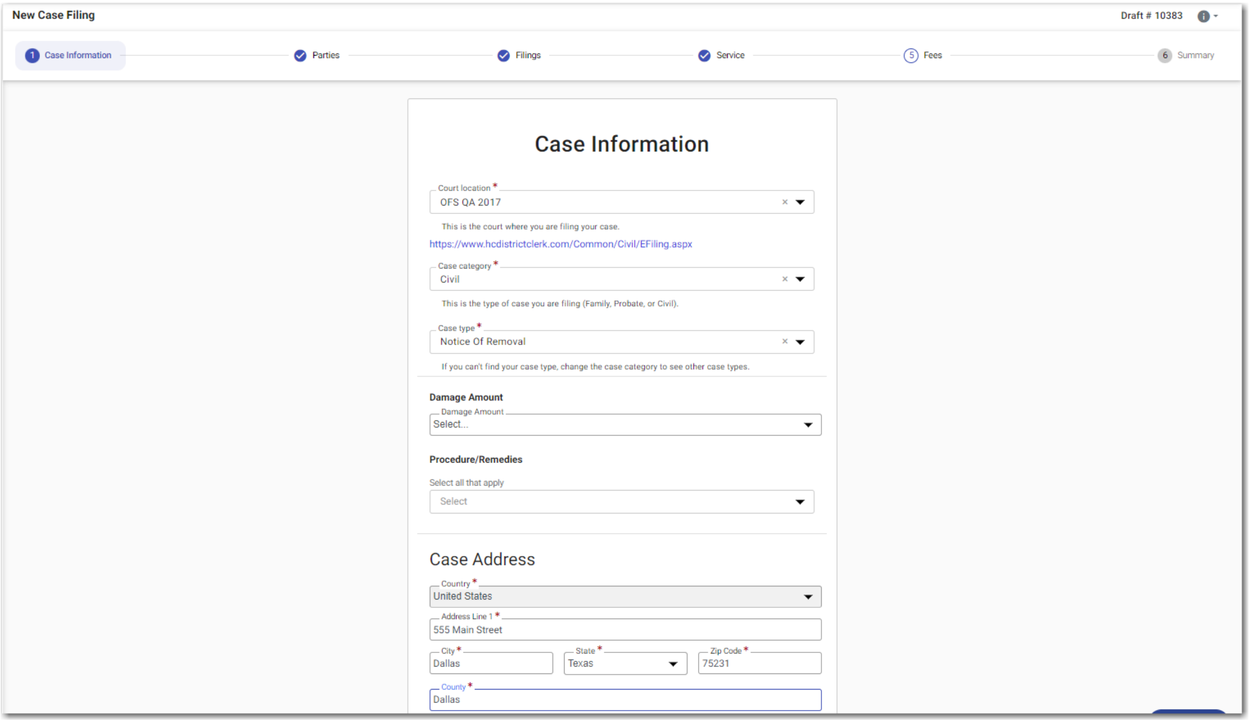
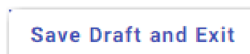



**Figure 9.6 – Example of a Case Information Page—Completed Case Address Pane**

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 theDamage 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.

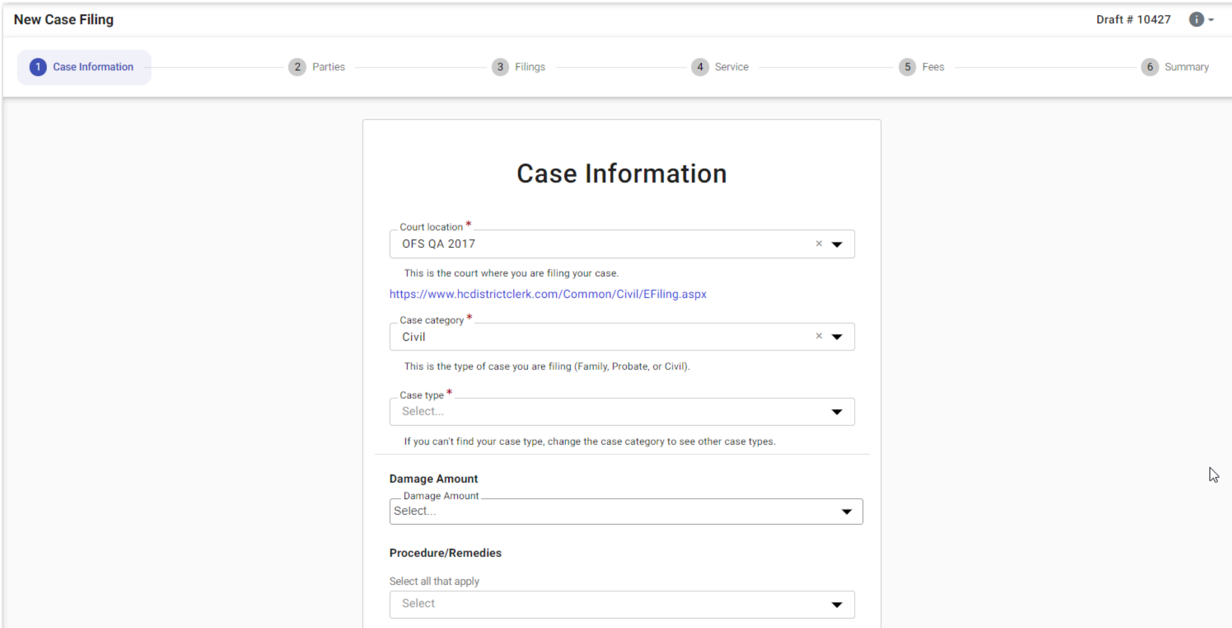



**Figure 9.7 – Example of a Case Information Page**

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.

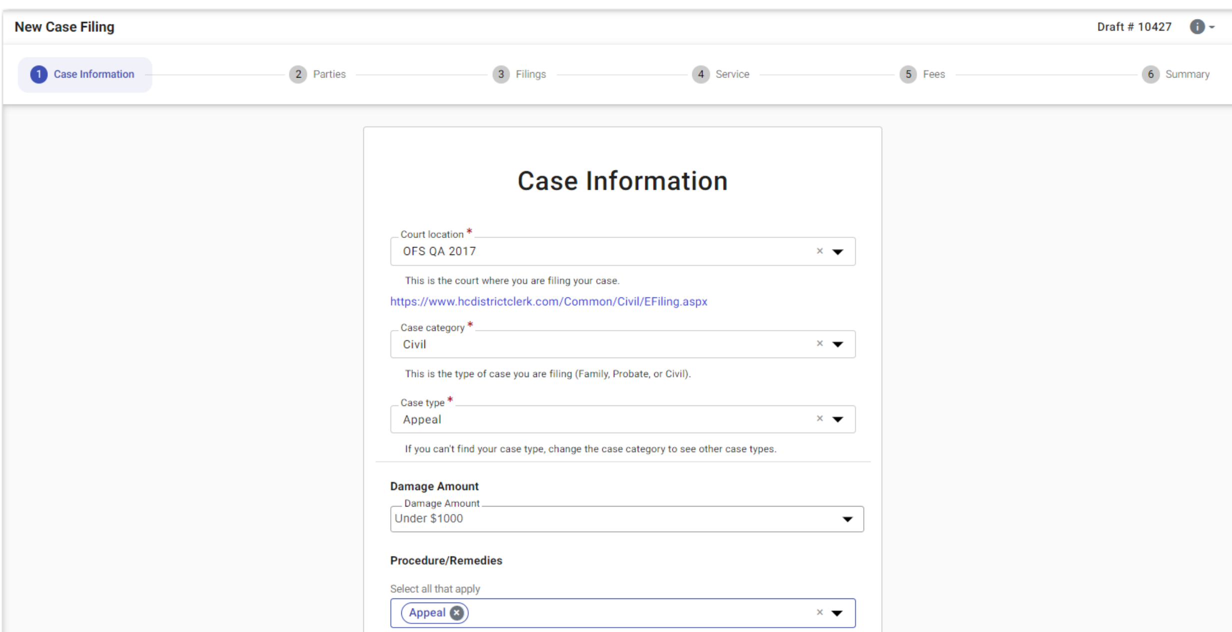



**Figure 9.8 – Example of a Completed Case Information Page**

6. 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 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.**

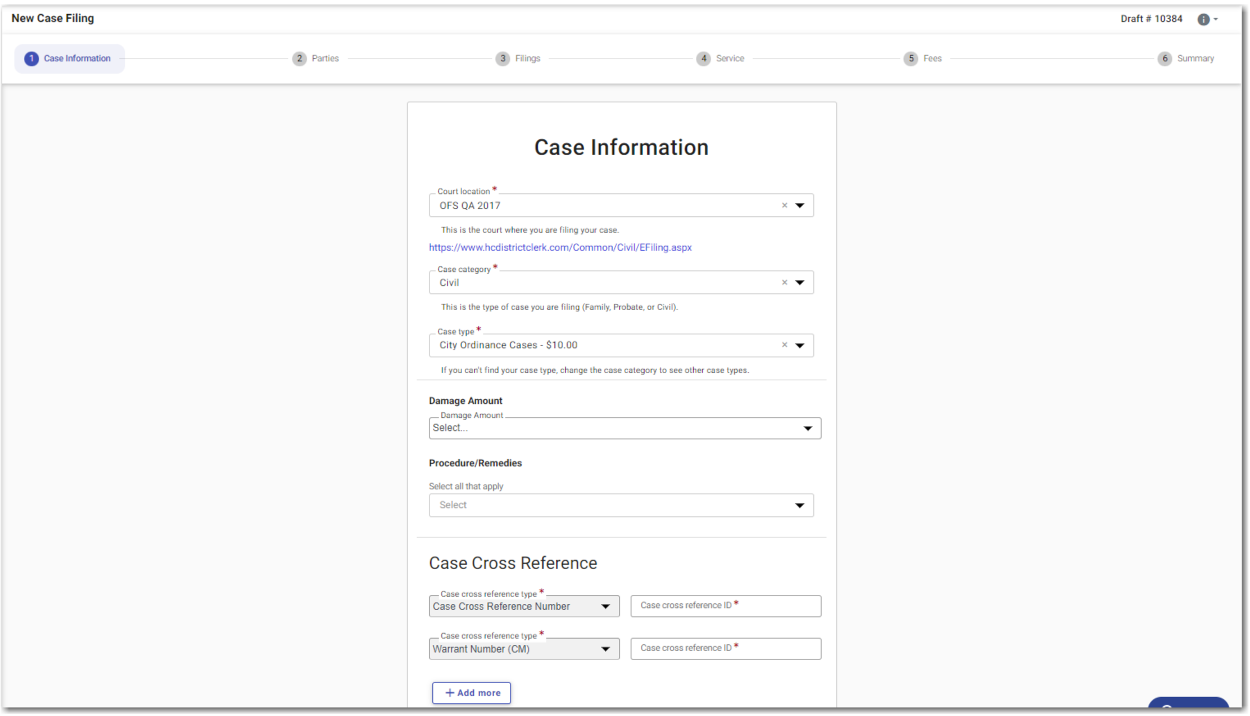
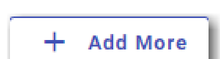



**Figure 9.9 – Example of a Case Information Page with the Case Cross Reference Section Displayed**

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 

.

   Another row for case cross references is displayed.

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

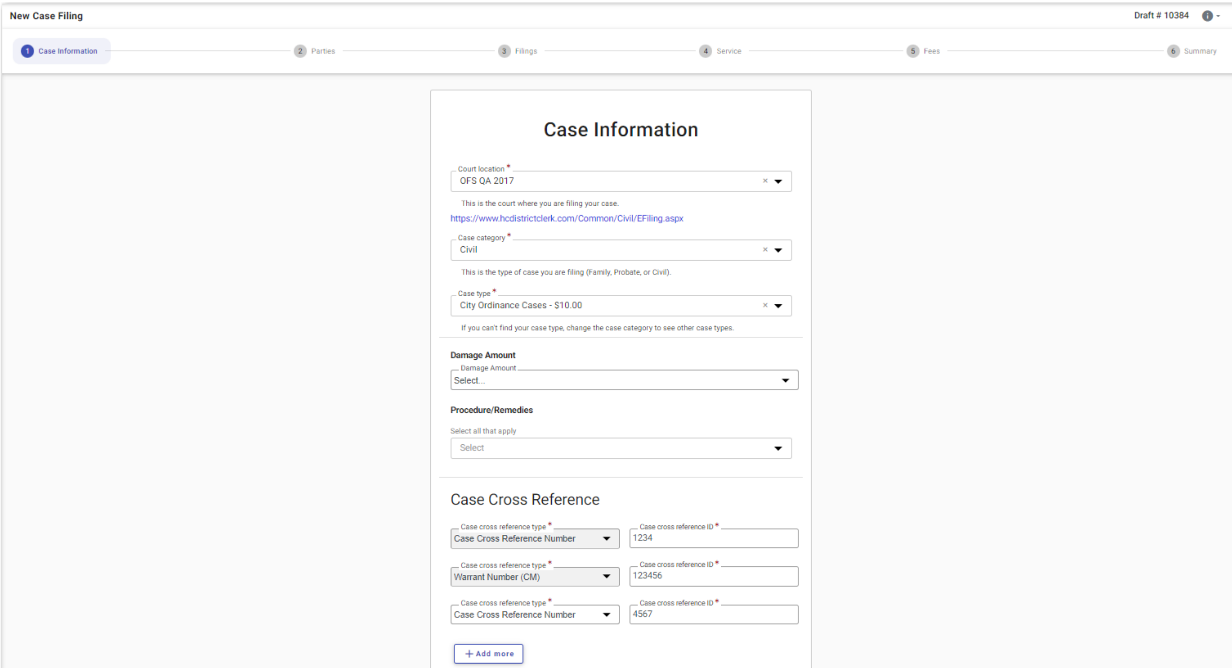



**Figure 9.10 – Example of a Case Information Page with Case Cross Reference Numbers Added**

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.

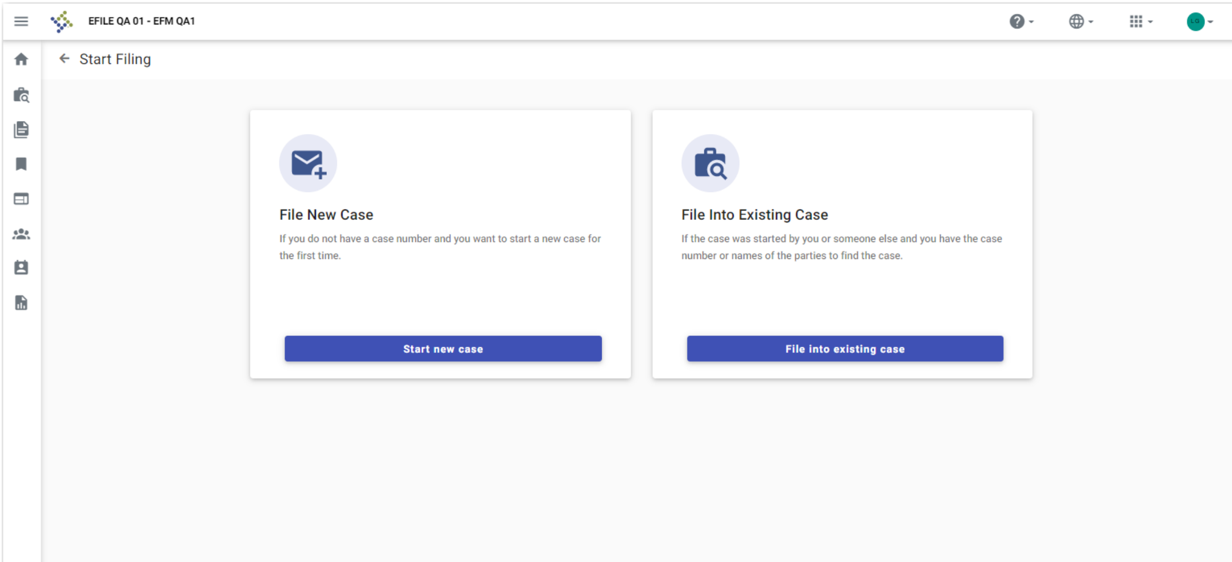



**Figure 9.11 – Start Filing Page**

2. Click 

.

   The *Case Information* page is displayed.

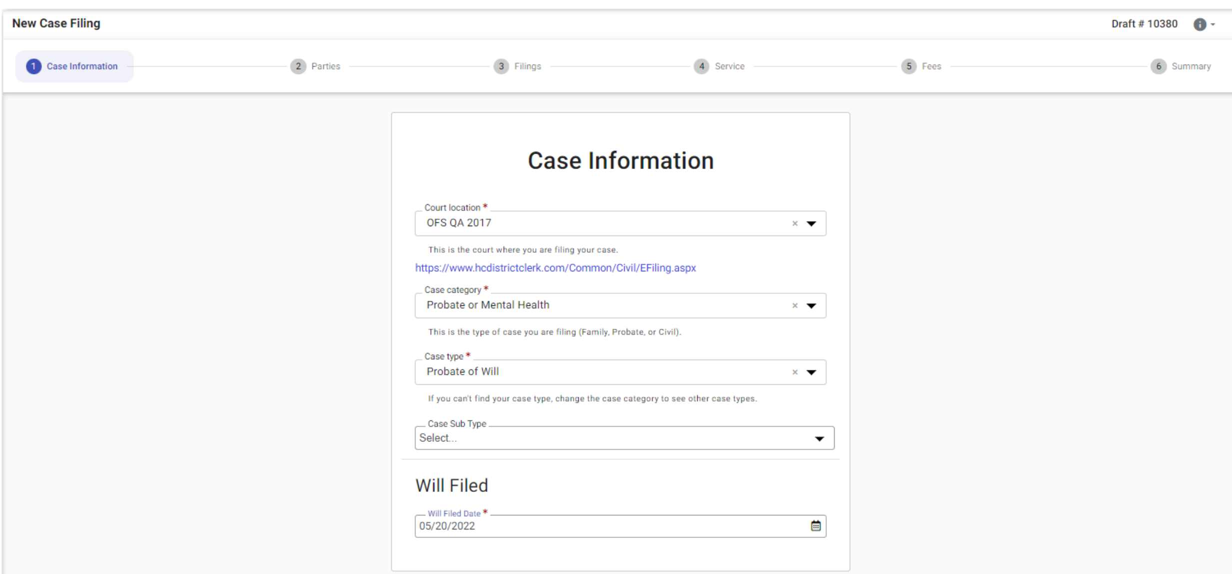



**Figure 9.12 – Example of the Will Filed Field on the Case Information Page**

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

# Entering Party Details

Each case requires a party type.

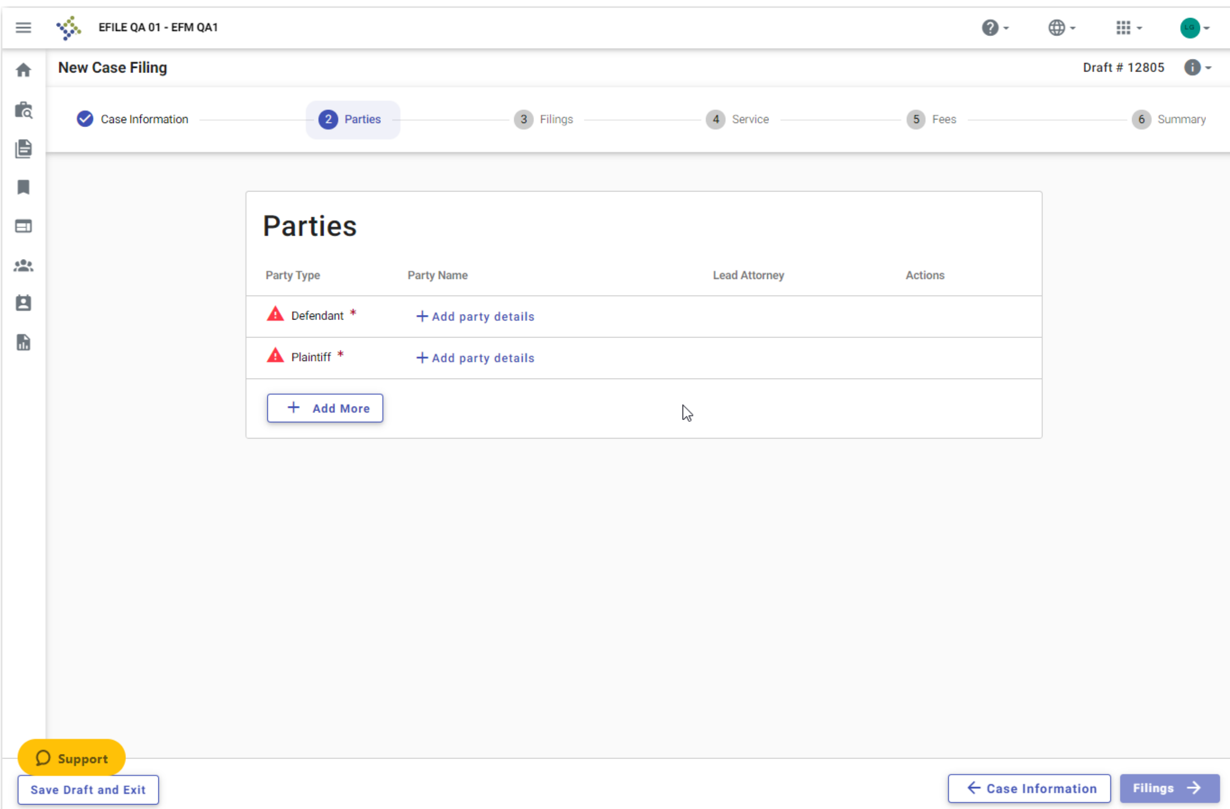



**Figure 9.13 – Example of a Parties Page**

**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 **+ Add party details**.

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

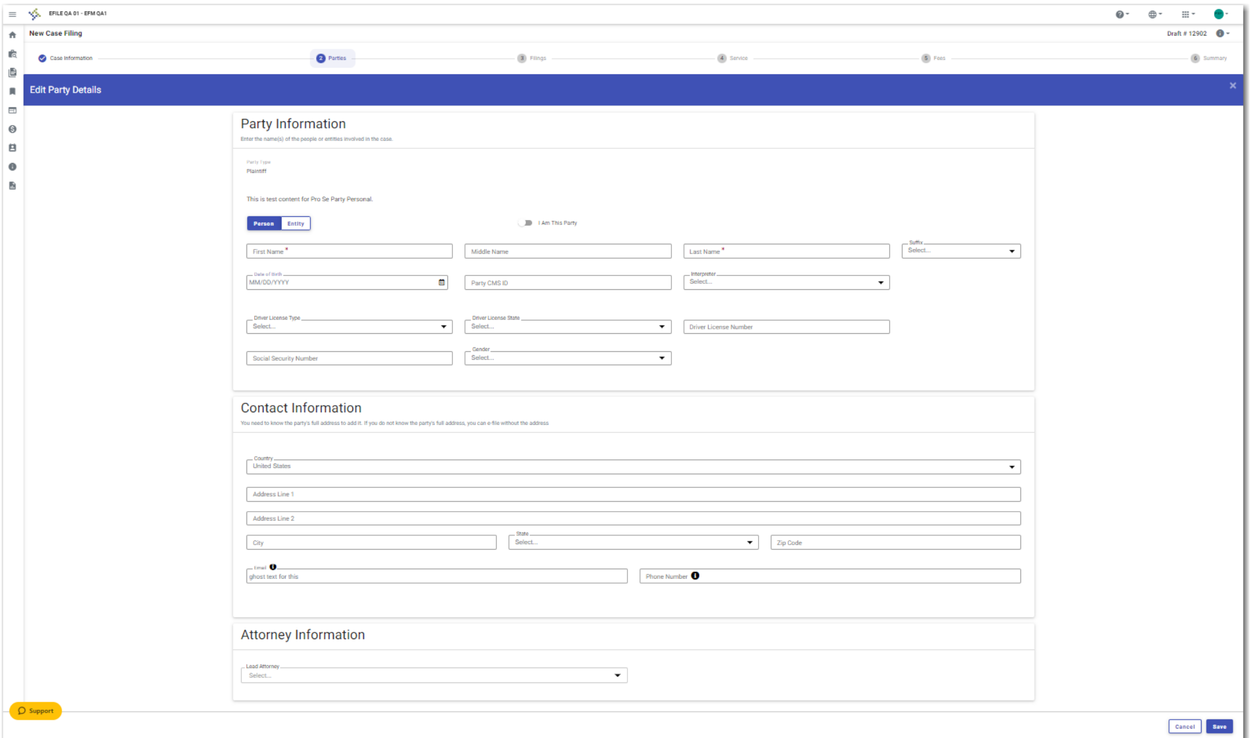
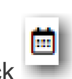



Figure 9.14 – Example of the Edit Party Details Window

2. Click either **Person** or **Entity**.

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

3. If you are the first party, select **I Am This Party**.
4. 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.
5. Type the party's date of birth in the **Date of Birth** field, or click  to select the date from the calendar.
6. Type the party case management system identification (ID) in the **Party CMS ID** field, if appropriate.
7. Select a language from the **Interpreter** drop-down list, if appropriate.
8. Select the type of driver's license from the **Drivers License Type** drop-down list.
9. Select the state where the driver's license was issued from the **Drivers License State** drop-down list.
10. Type the party's driver's license number in the **Drivers License Number** field.
11. 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.**

12. Select the party's gender from the **Gender** 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 **Pro Se** for the filing attorney.
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 parties have been added to the case.
18. Click 

to save your work and continue.

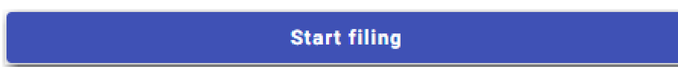
# Entering Date of Death on the Parties Page

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.

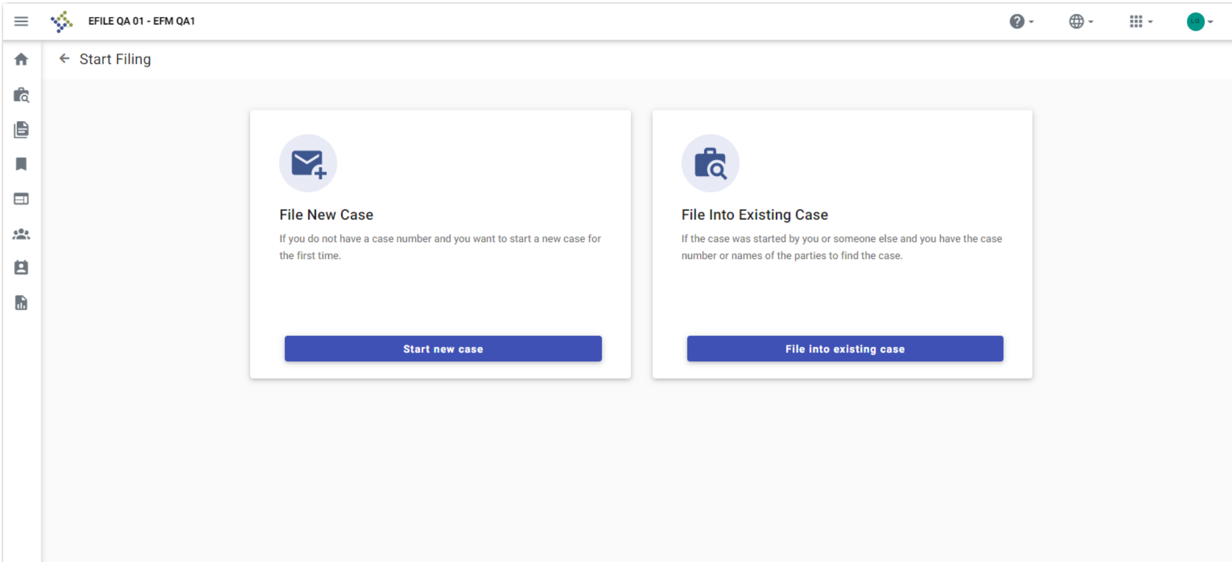



**Figure 9.15 – Start Filing Page**

2. Click **Start new case**.

   The *Case Information* page is displayed.

3. Complete the required sections on the *Case Information* page, and then click **Parties →**.

   The *Parties* page is displayed.

4. 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.

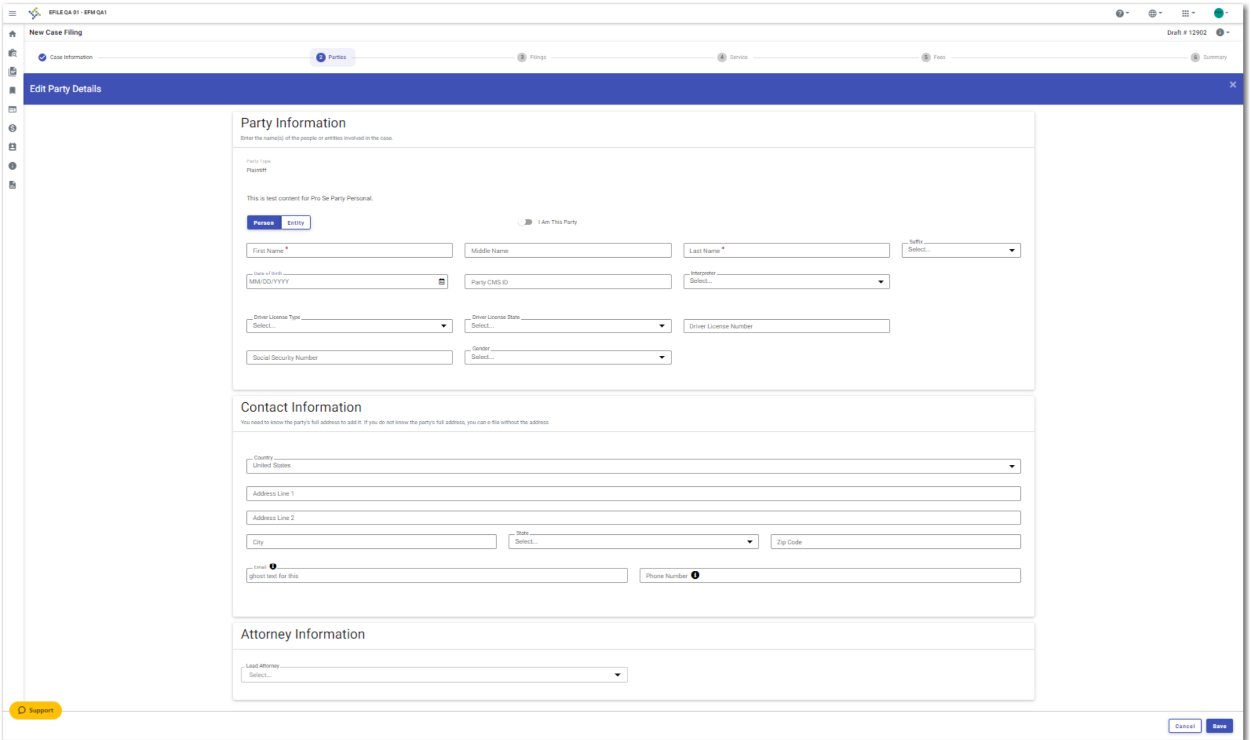
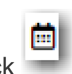



**Figure 9.16 – Example of the Edit Party Details Window**

5. 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.**

6. If you are the first party, select **I Am This Party**.
7. 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.
8. Type the deceased party's birth date in the **Date of Birth** field, or click  to select the date from the calendar.
9. Type the party case management system identification (ID) in the **Party CMS ID** field, if appropriate.
10. Select a language from the **Interpreter** drop-down list, if appropriate.
11. Select the type of driver's license from the **Drivers License Type** drop-down list.
12. Select the state where the driver's license was issued from the **Drivers License State** drop-down list.
13. Type the party's driver's license number in the **Drivers License Number** field.
14. 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.**

15. Select the deceased party's gender from the **Gender** drop-down list.

16. Type the deceased party's date of death in the **Date of Death** field, or click to select a date from the calendar.
17. In the Contact Information pane, enter the country, address, city, state, ZIP code, and phone number for the specified party.
18. In the Attorney Information pane, from the **Lead Attorney** drop-down list, select **Pro Se** for the filing attorney.
19. After all of required fields for the specified party are completed, click **Save**.
20. On the *Parties* page, if you have another party to add to the case, click **+ Add More**. 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 **Filings →** to save your work and continue.

# Entering Filing Details

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

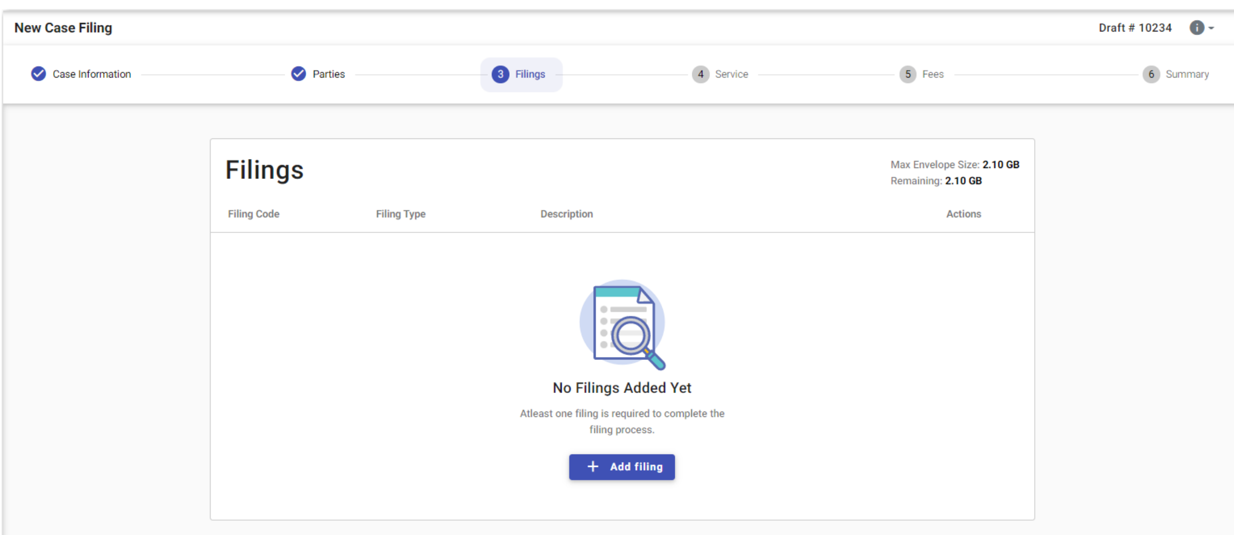



**Figure 9.17 – Filings Page**

**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 **+ Add filing**.

   The *Edit Filing Details* page is displayed.

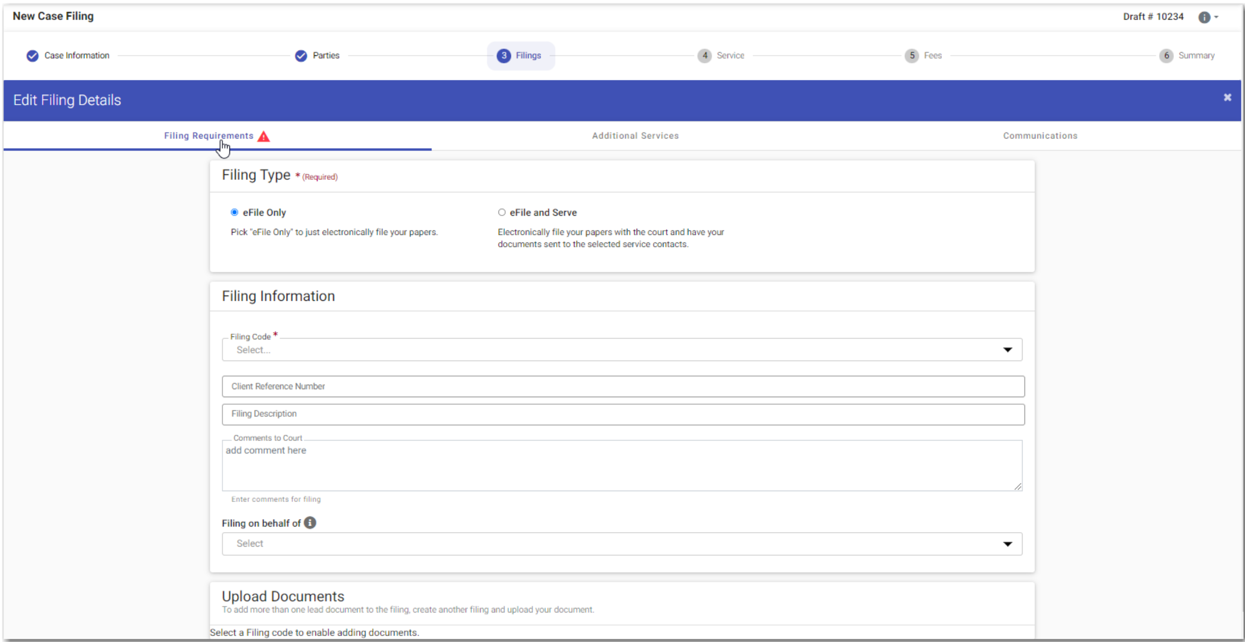
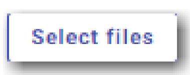



**Figure 9.18 – Edit Filing Details Page**

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."**

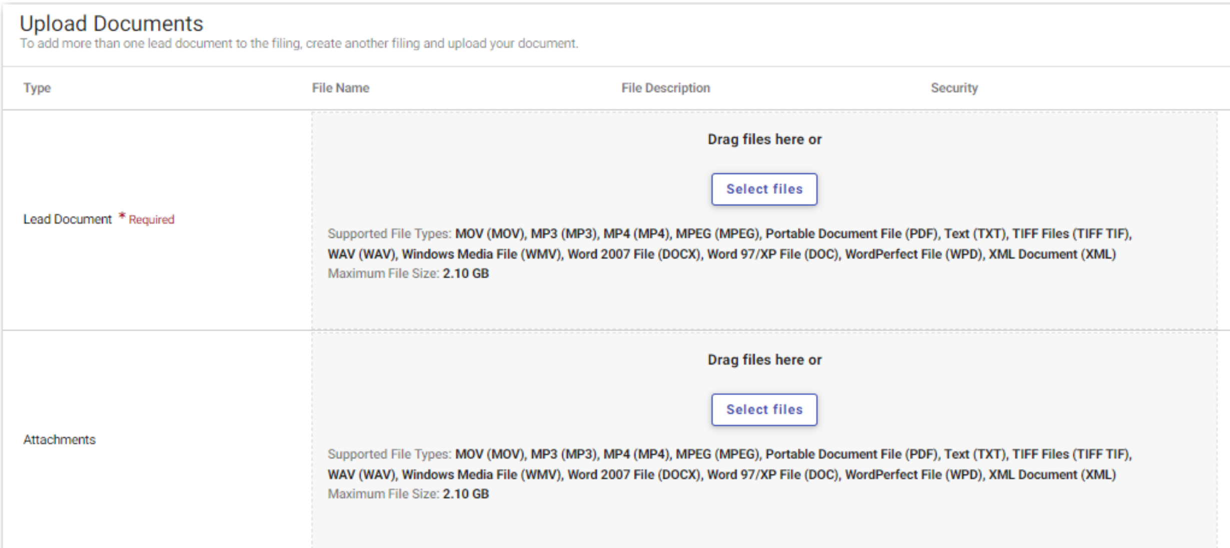



**Figure 9.19 – Upload Documents Pane**

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.

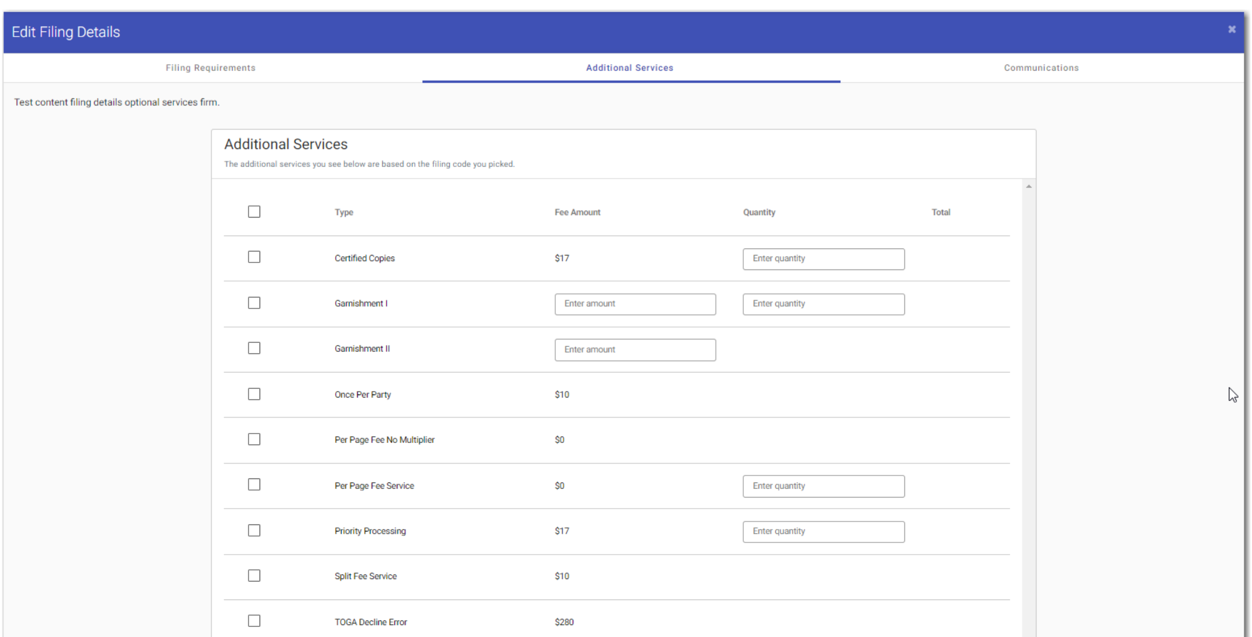



**Figure 9.20 – Additional Services Pane on the Edit Filing Details Page**

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.

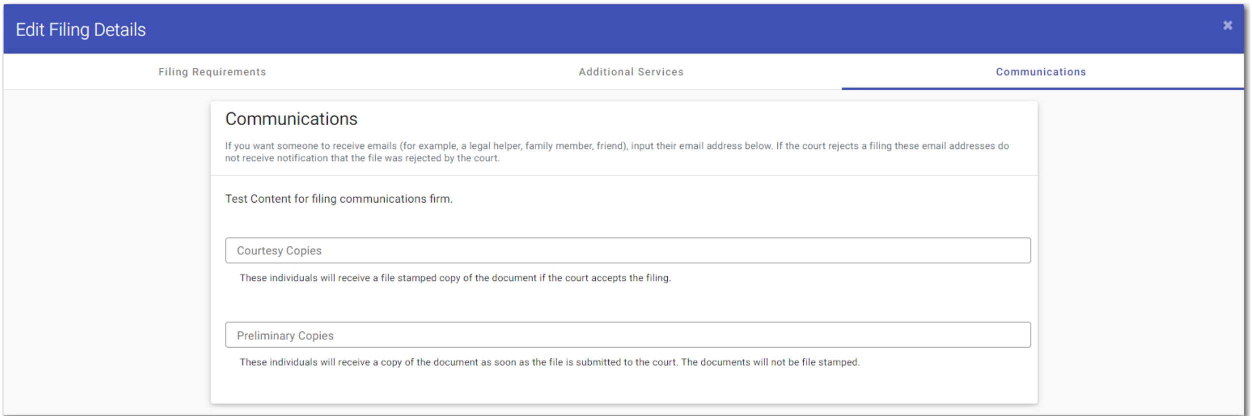



**Figure 9.21 – Communications Pane on the Edit Filing Details Page**

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**.

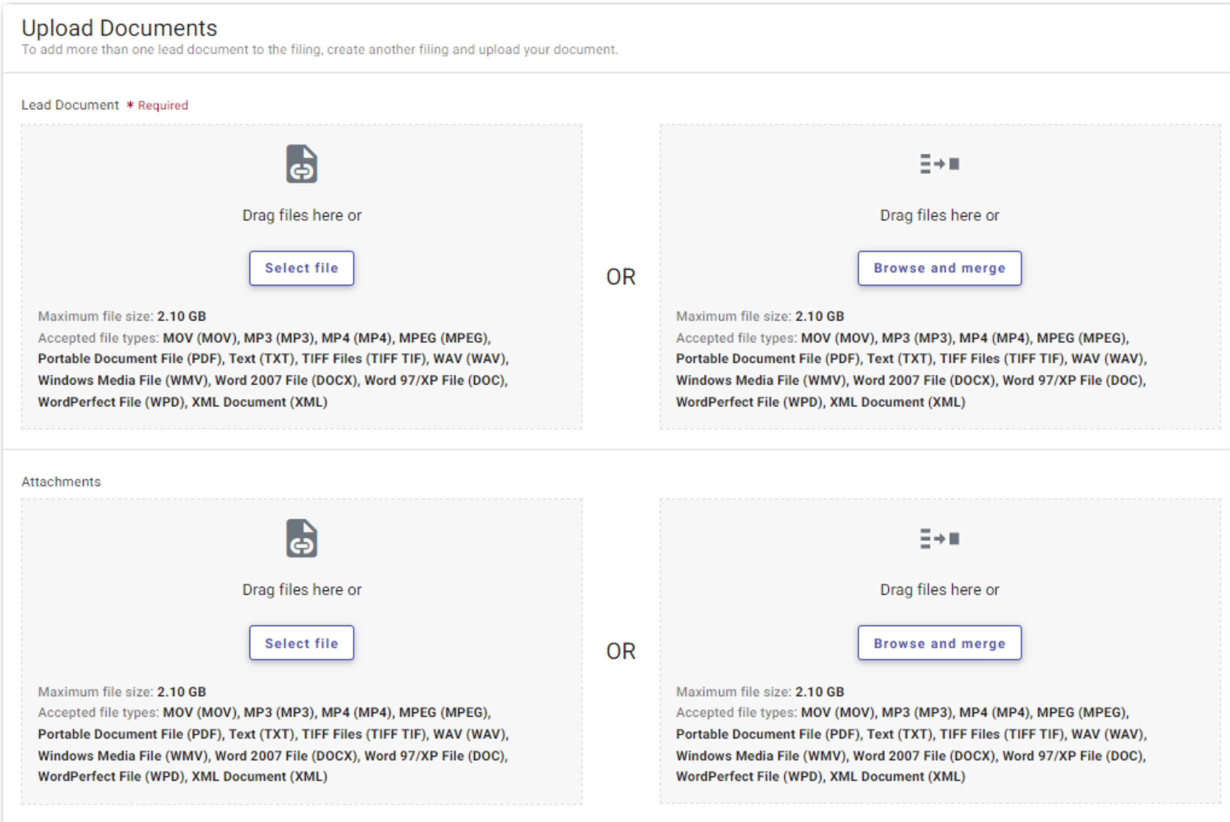



**Figure 9.22 – Example of the Upload Documents Pane**

The *Merge Files* window is displayed.

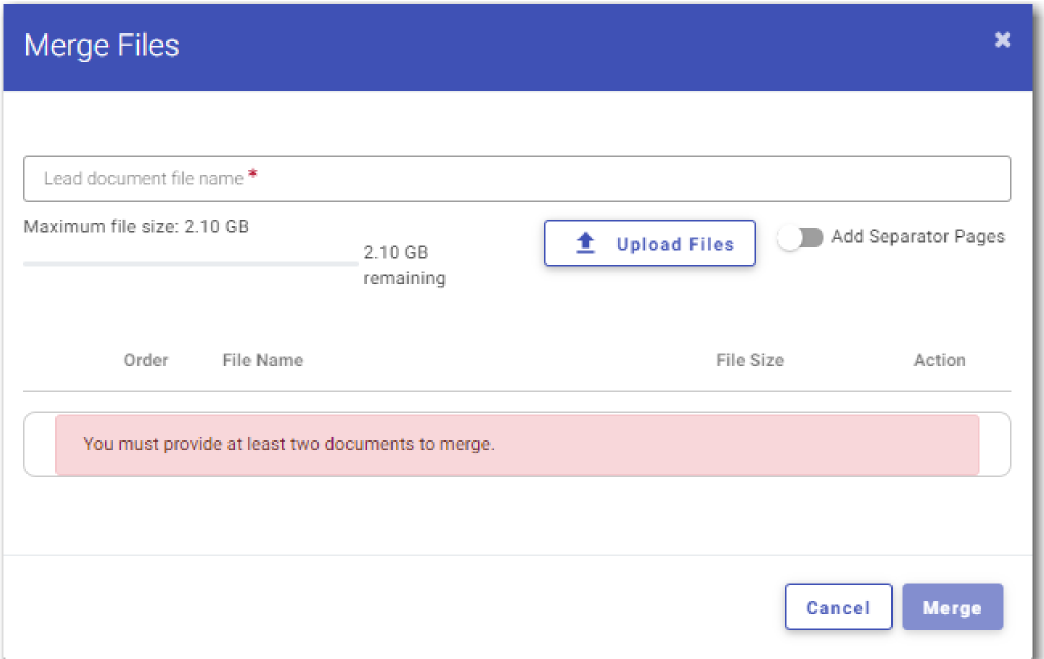



**Figure 9.23 – Merge Files Window**

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   .

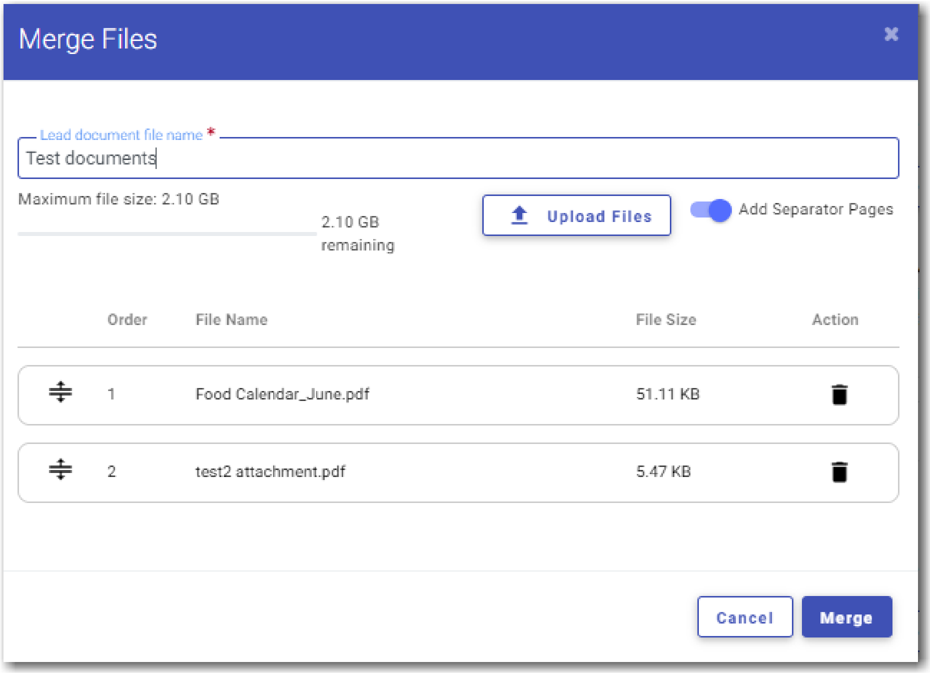



**Figure 9.24 – Example of a Merge Files Window with the Files Uploaded**

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.**

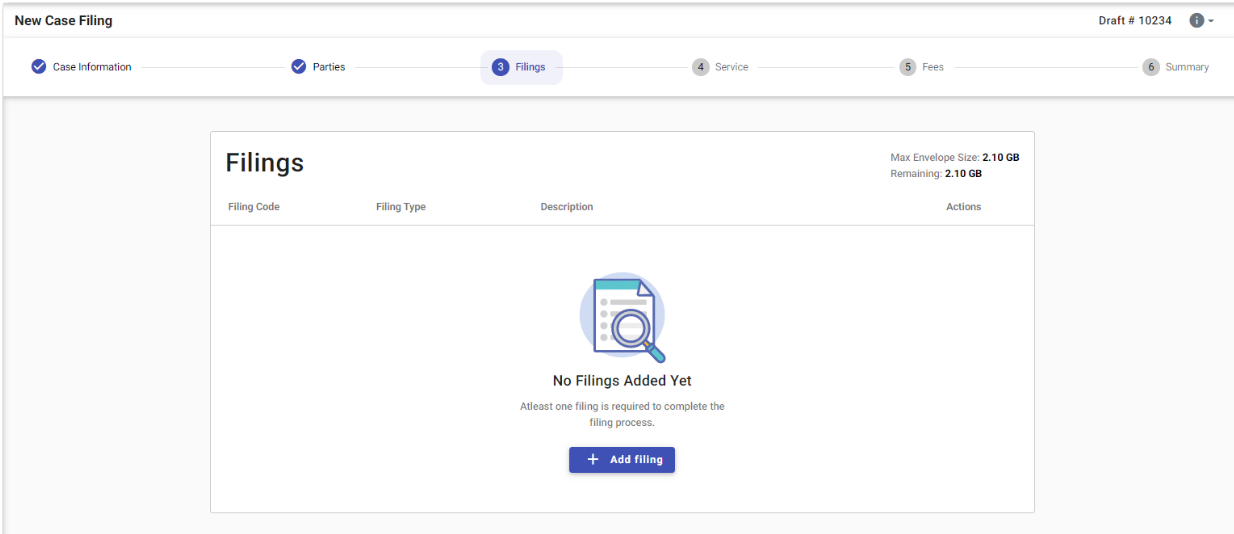



**Figure 9.25 – Filings Page**

To enter the filing details:

1. On the *Filings* page, click  .

   The *Edit Filing Details* page is displayed.

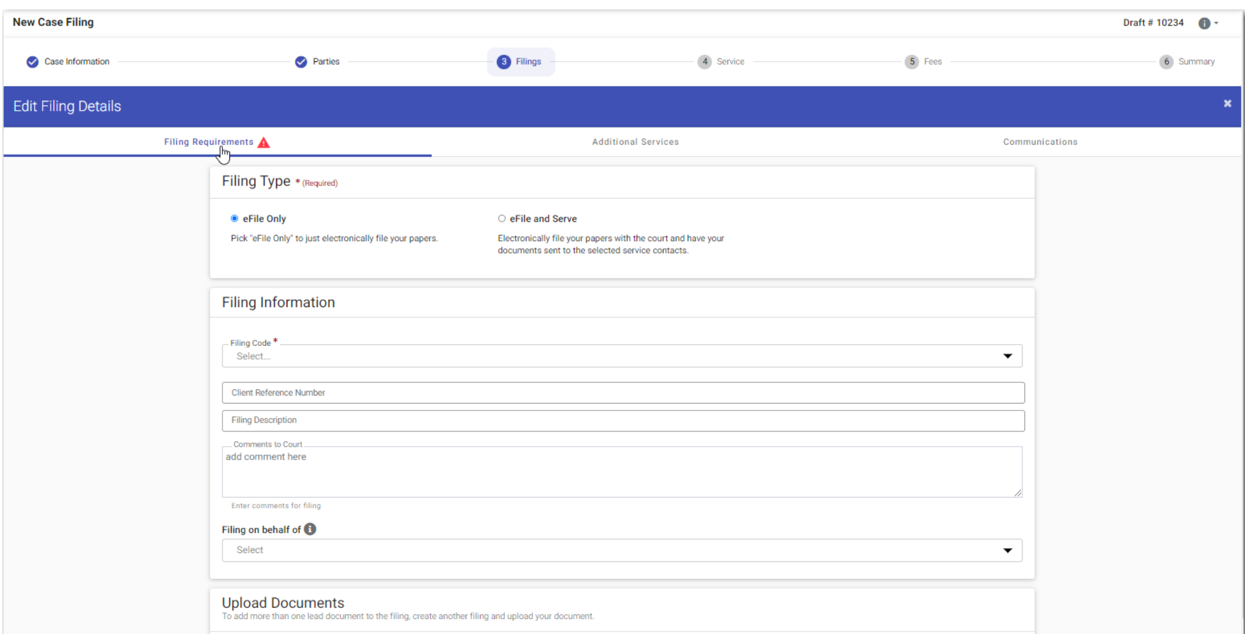



**Figure 9.26 – Edit Filing Details Page**

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.
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."**

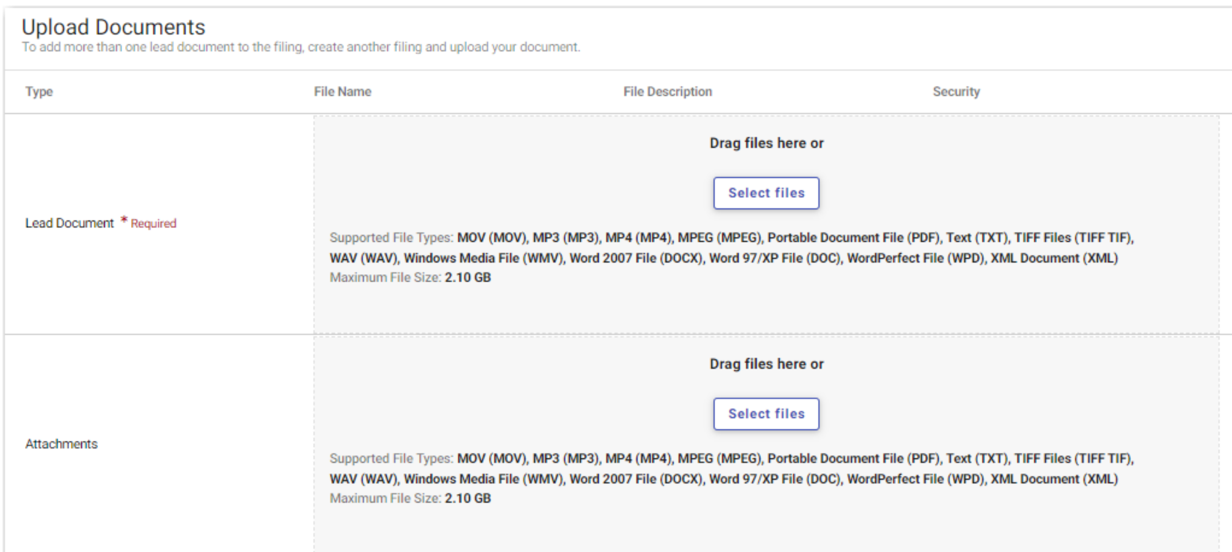
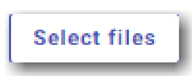



**Figure 9.27 – Upload Documents Pane**

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.

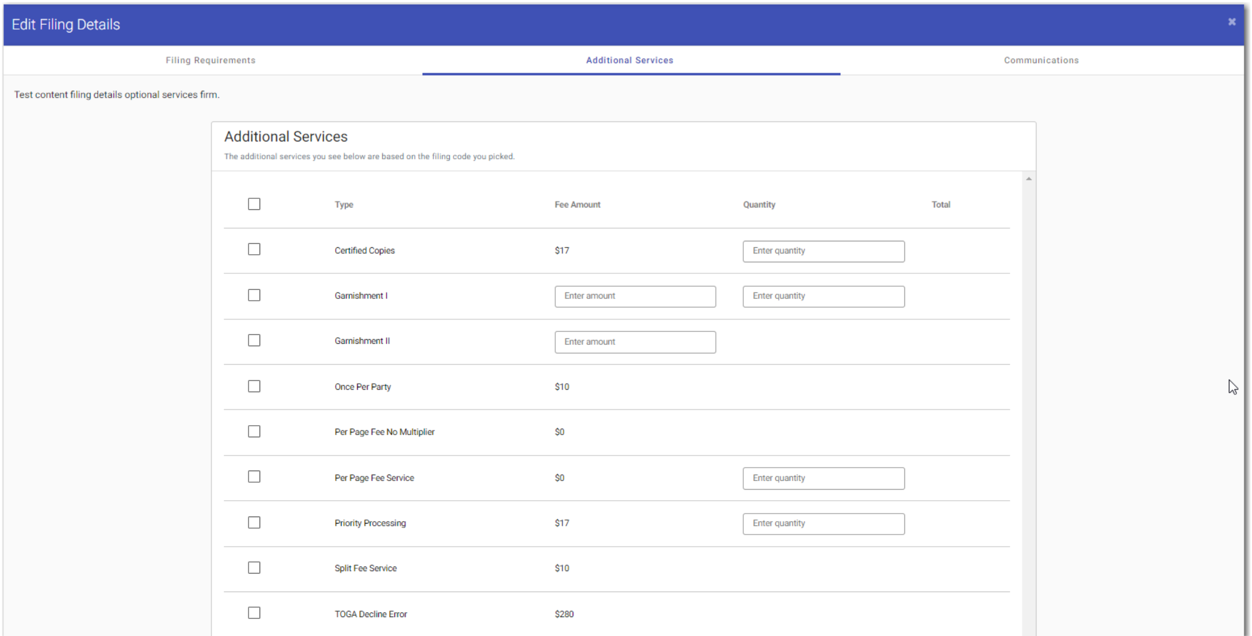



**Figure 9.28 – Additional Services Pane on the Edit Filing Details Page**

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.

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

    The Communications pane is displayed.

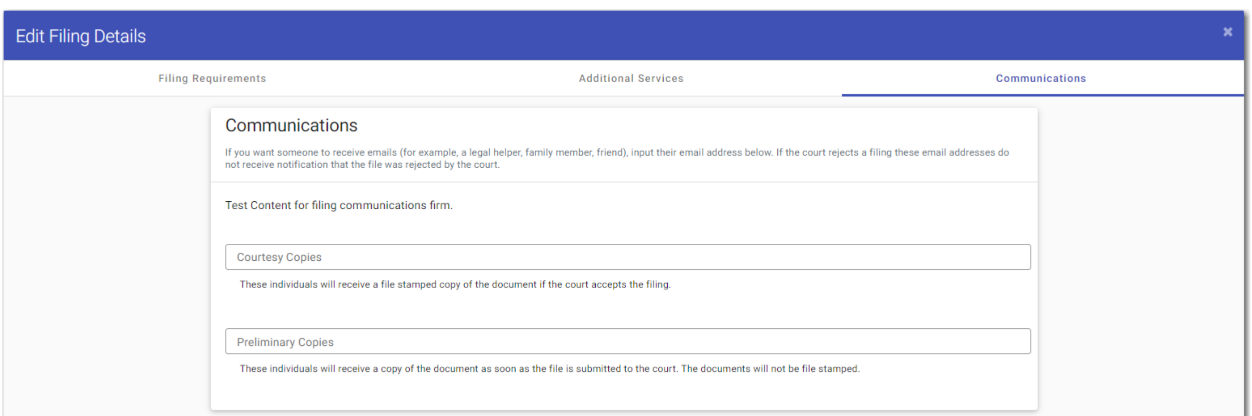



**Figure 9.29 – Communications Pane on the Edit Filing Details Page**

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

15. Click **Save**.

16. Click **Service →**.

    The *Service* page is displayed.

17. Select the service contacts, and then click 

.

    The *Fees* page is displayed.

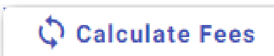
18. On the *Fees* page, type the amount of damages for the case in the **Ad Damnum** field.

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

22. Click 

.

    The fees for the filing are displayed.

23. 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.**

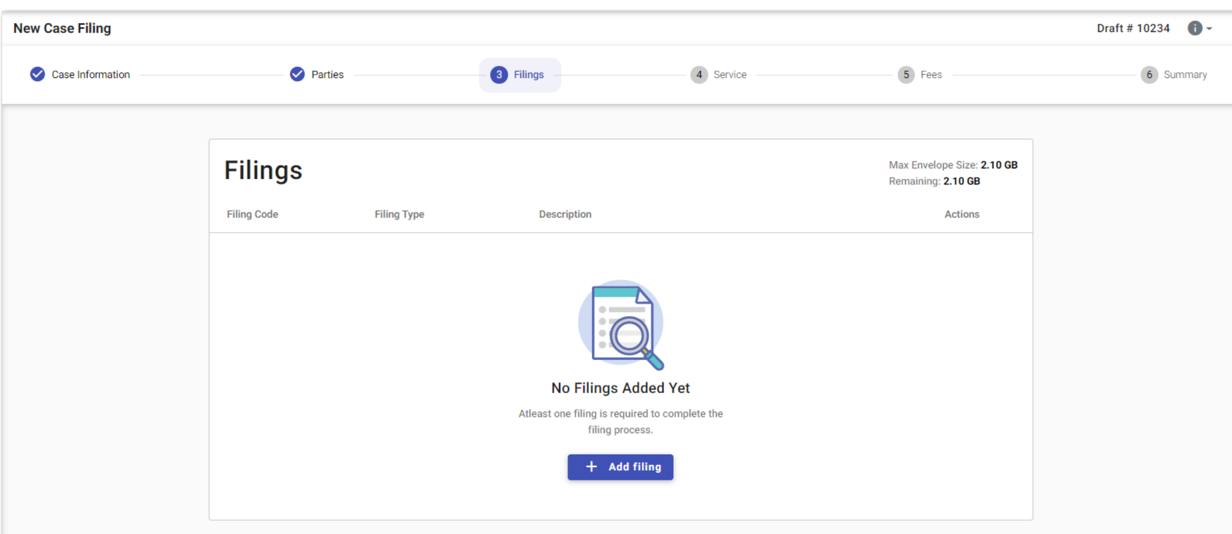
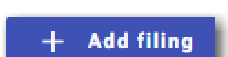



**Figure 9.30 – Filings Page**

To enter a filing with a Motion Type code:

1. On the *Filings* page, click 

.

The *Edit Filing Details* page is displayed.

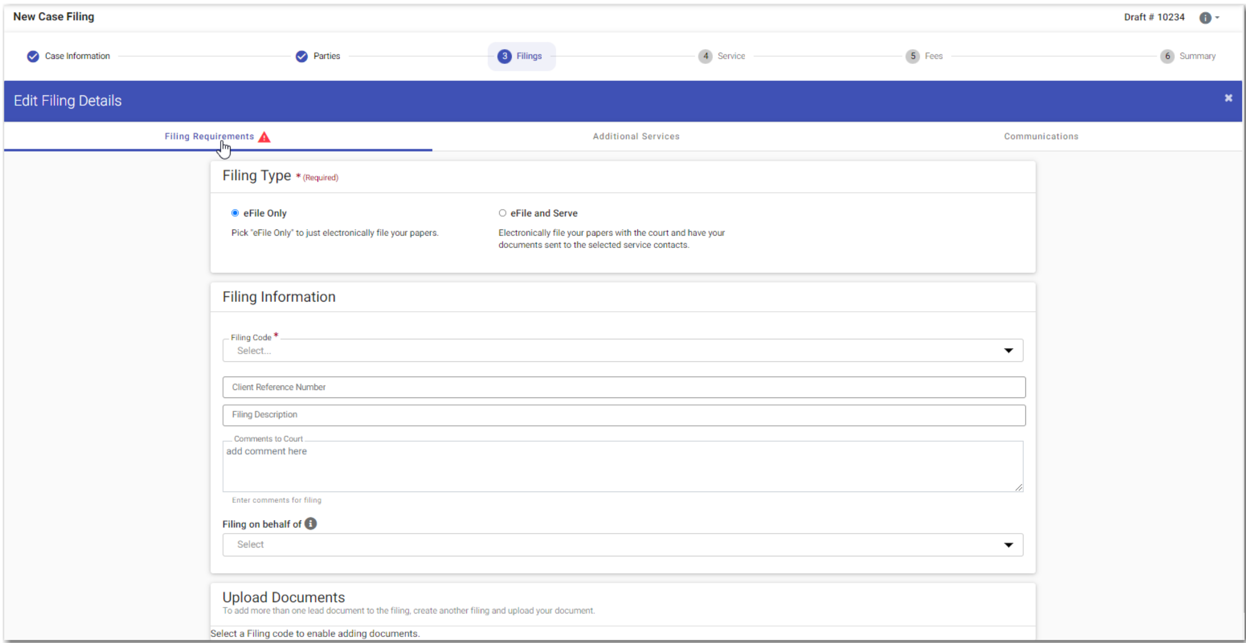
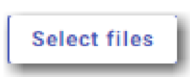



**Figure 9.31 – Edit Filing Details Page**

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 

. 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."**

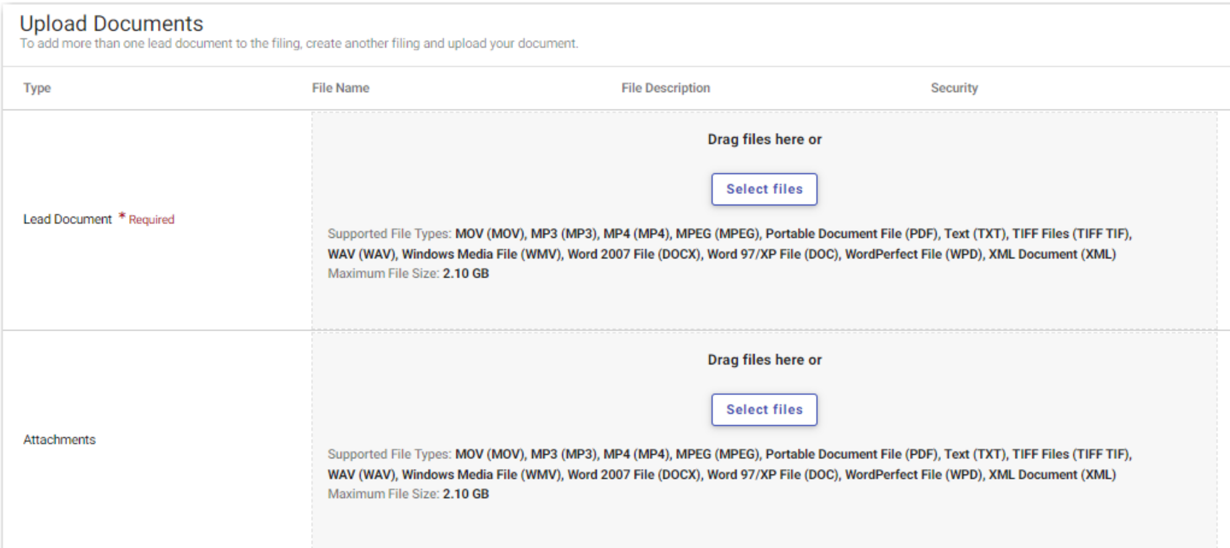



**Figure 9.32 – Upload Documents Pane**

10. If you have attachments to add to the filing, click  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.

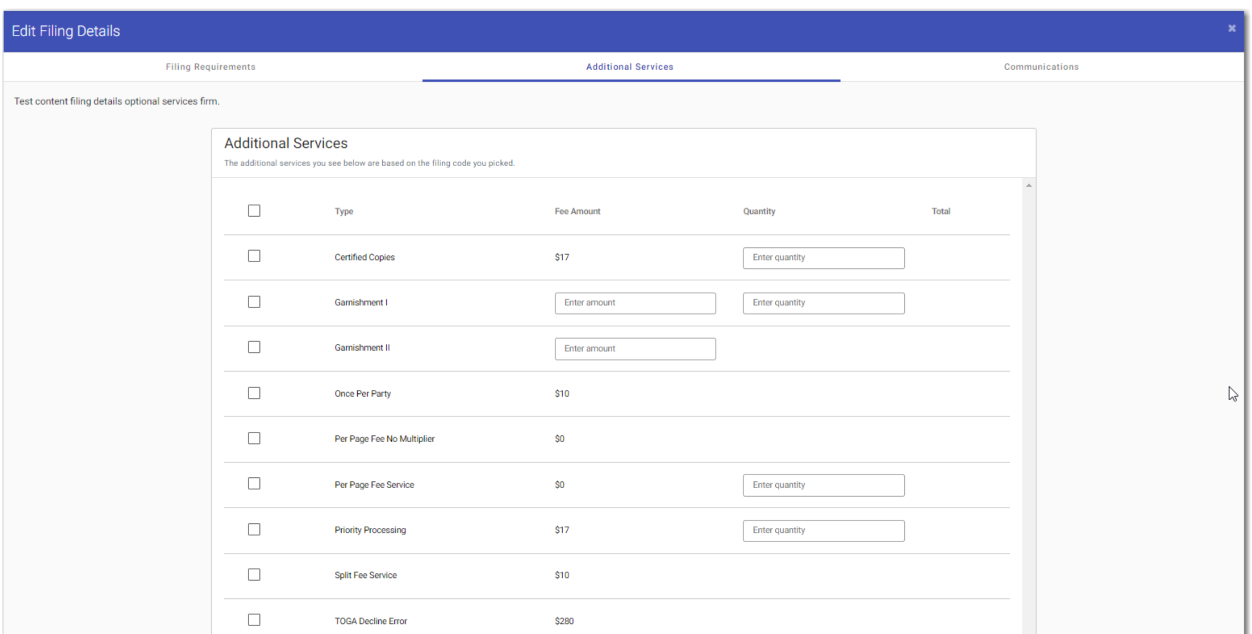
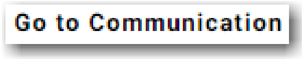



**Figure 9.33 – Additional Services Pane on the Edit Filing Details Page**

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 

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

The Communications pane is displayed.

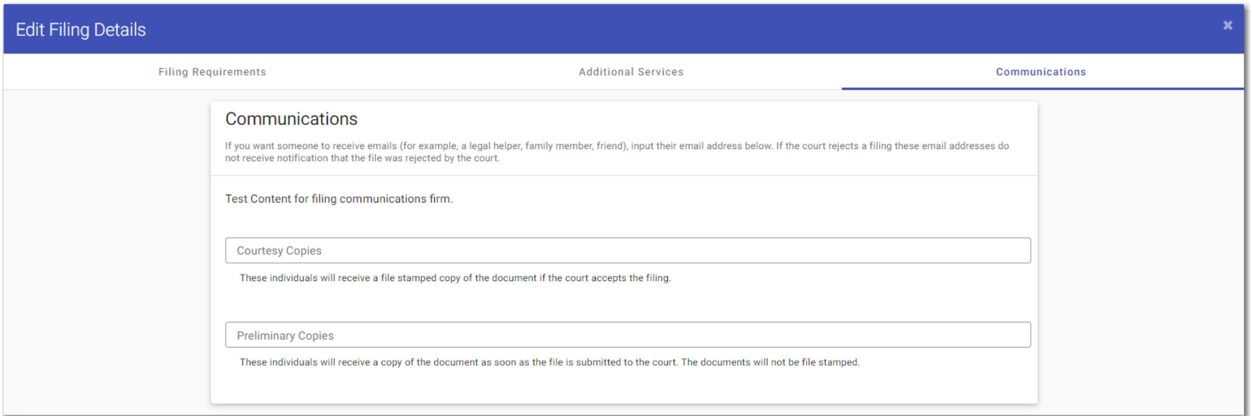



**Figure 9.34 – Communications Pane on the Edit Filing Details Page**

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

16. Click 

.

17. If you want to add another filing, on the *Filings* page, click 

. Then, repeat the same steps for the next filing.

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

.

# 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.**

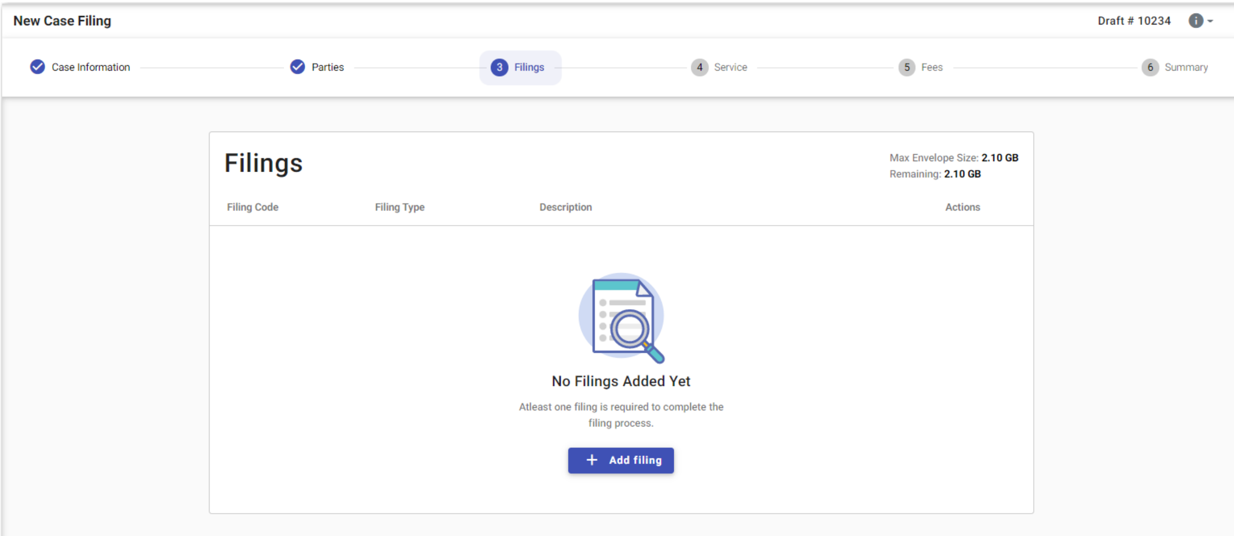



Figure 9.35 – Filings Page

To enter the filing details:

1. On the *Filings* page, click 

.

   The *Edit Filing Details* page is displayed.

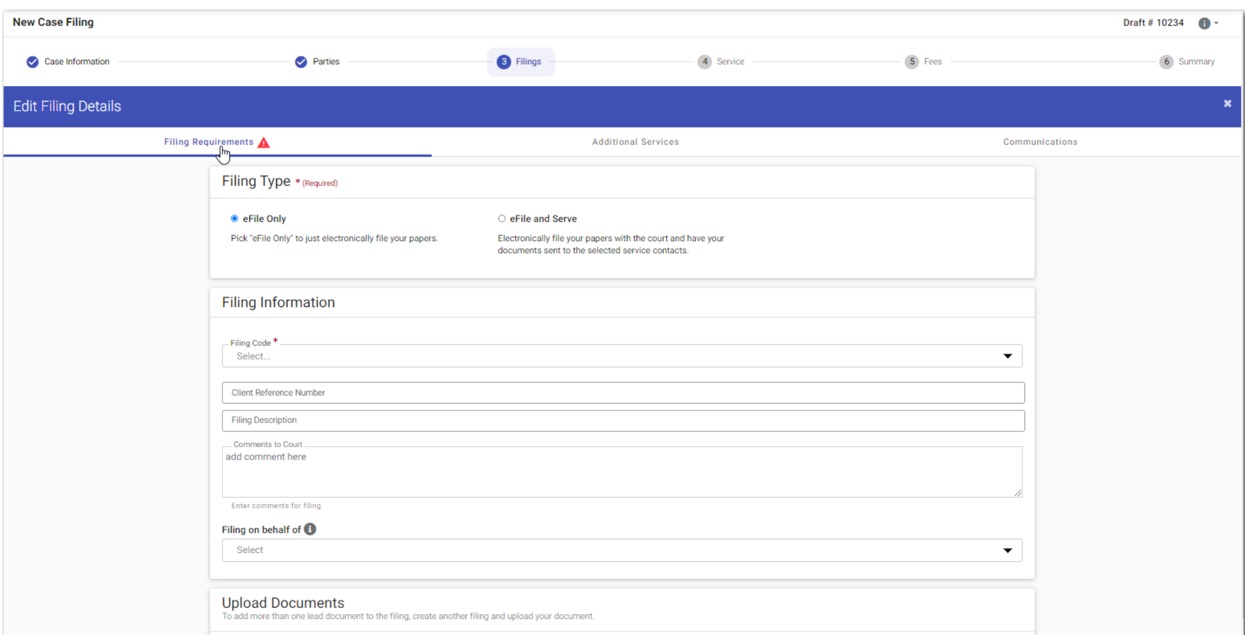



Figure 9.36 – Edit Filing Details Page

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.
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."**

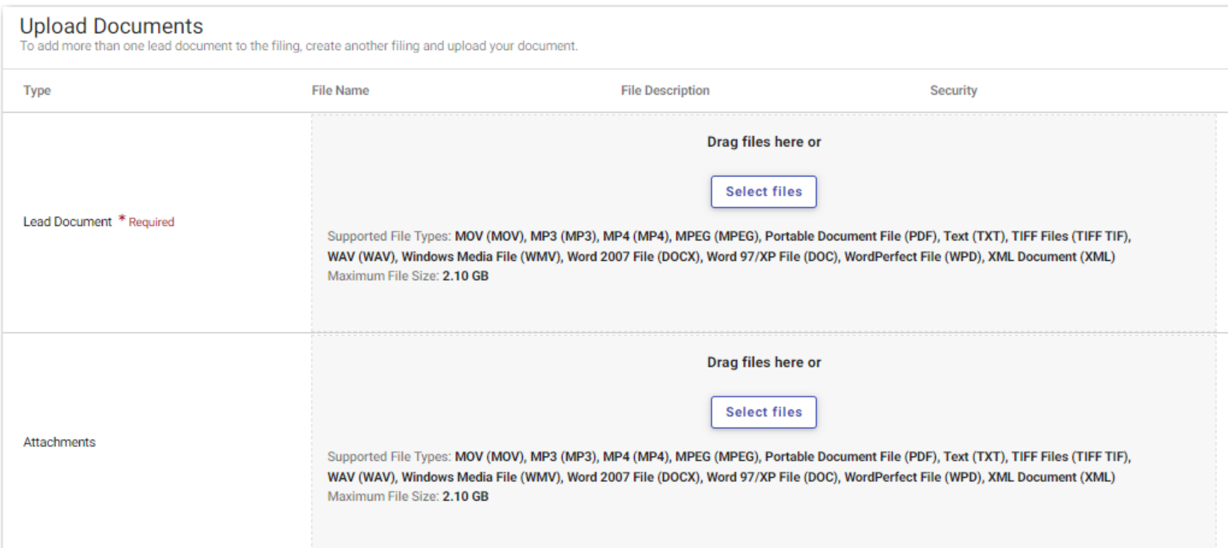
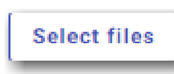



**Figure 9.37 – Upload Documents Pane**

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.

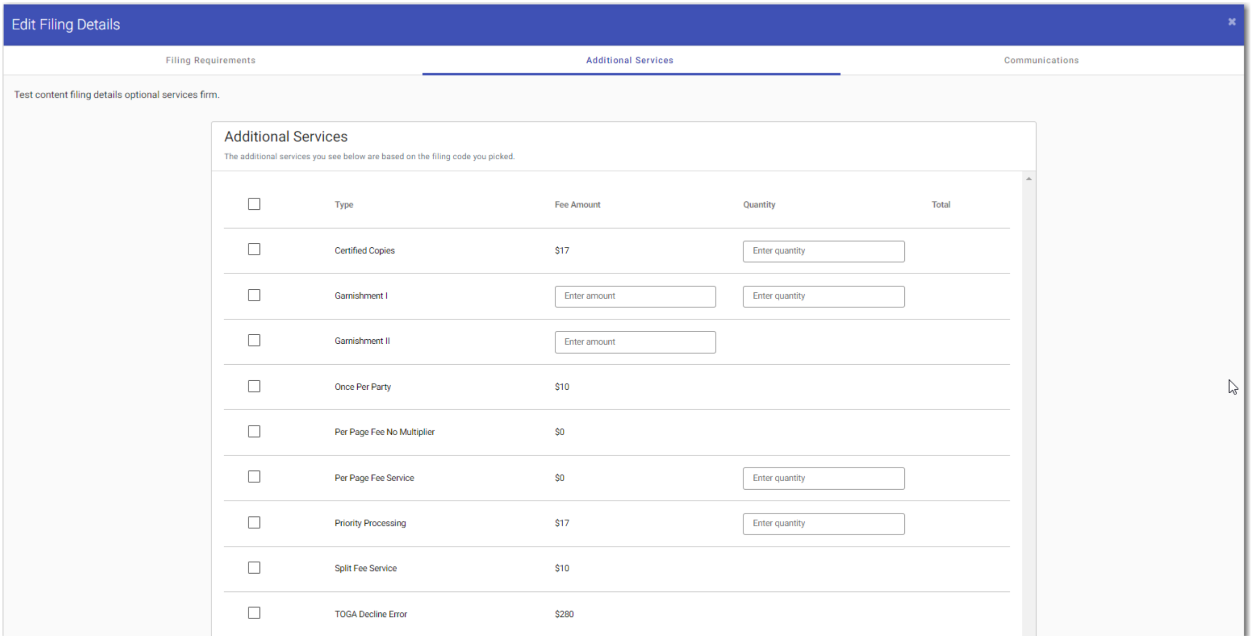
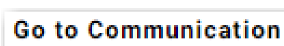



**Figure 9.38 – Additional Services Pane on the Edit Filing Details Page**

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.

13. Click 

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

    The Communications pane is displayed.

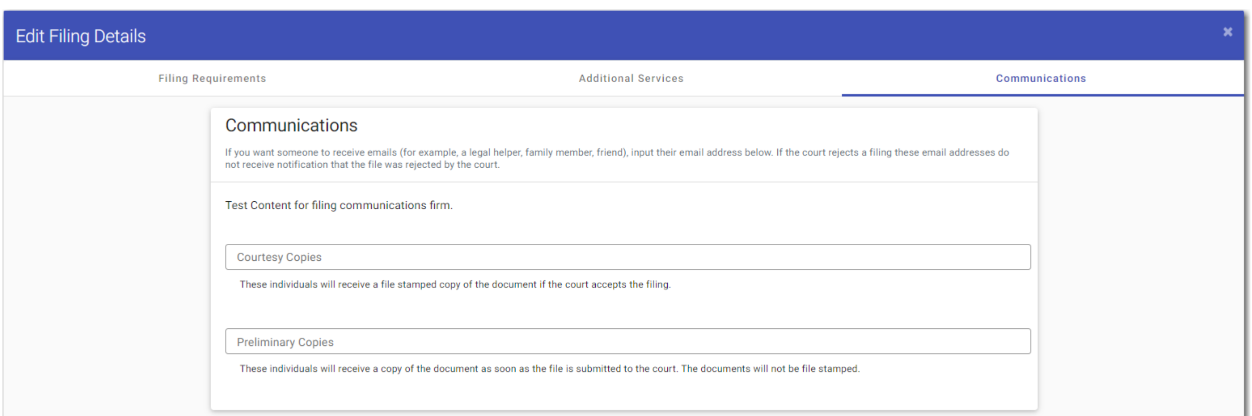
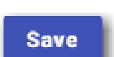
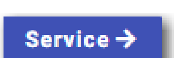



**Figure 9.39 – Communications Pane on the Edit Filing Details Page**

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

15. Click 

.

16. Click 

.

    The *Service* page is displayed.

17. Select the service contacts, and then click Fees → .

    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 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 filer type from the **Filer Type** drop-down list.
22. Click Calculate Fees .

    The fees for the filing are displayed.

23. Click Summary → 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.**

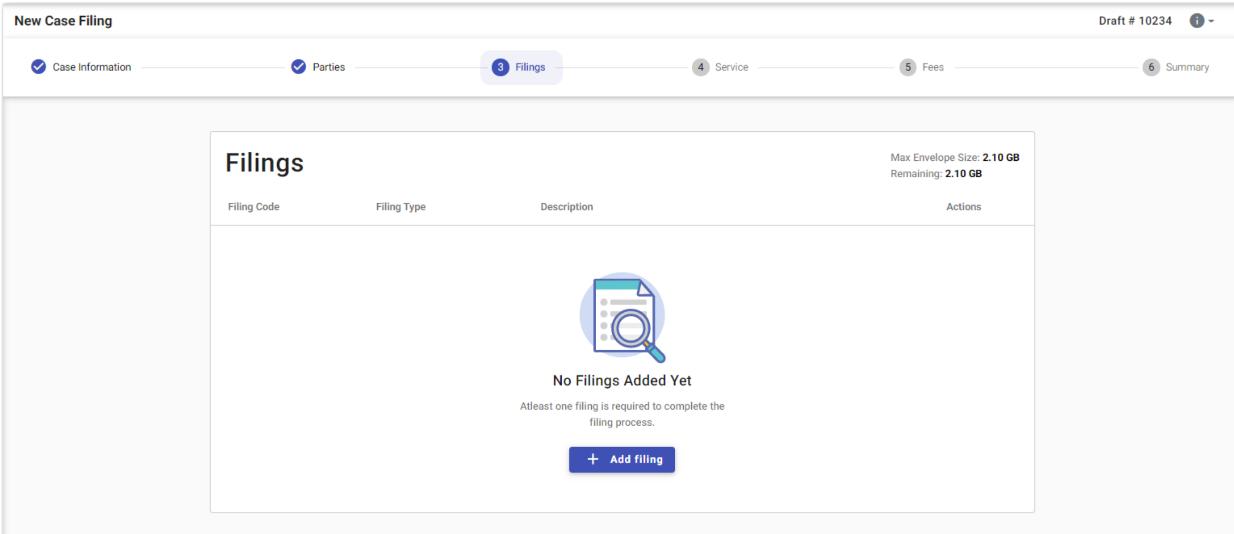



**Figure 9.40 – Filings Page**

To enter the filing details:

1. On the *Filings* page, click 

.

   The *Edit Filing Details* page is displayed.

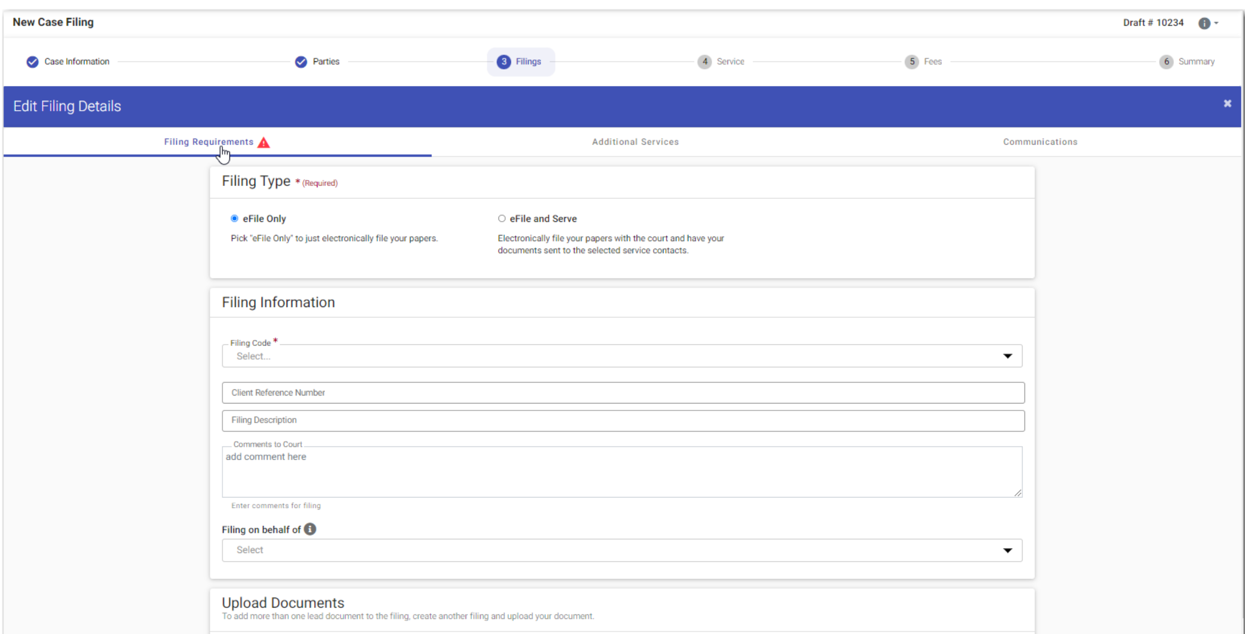



**Figure 9.41 – Edit Filing Details Page**

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.
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."**

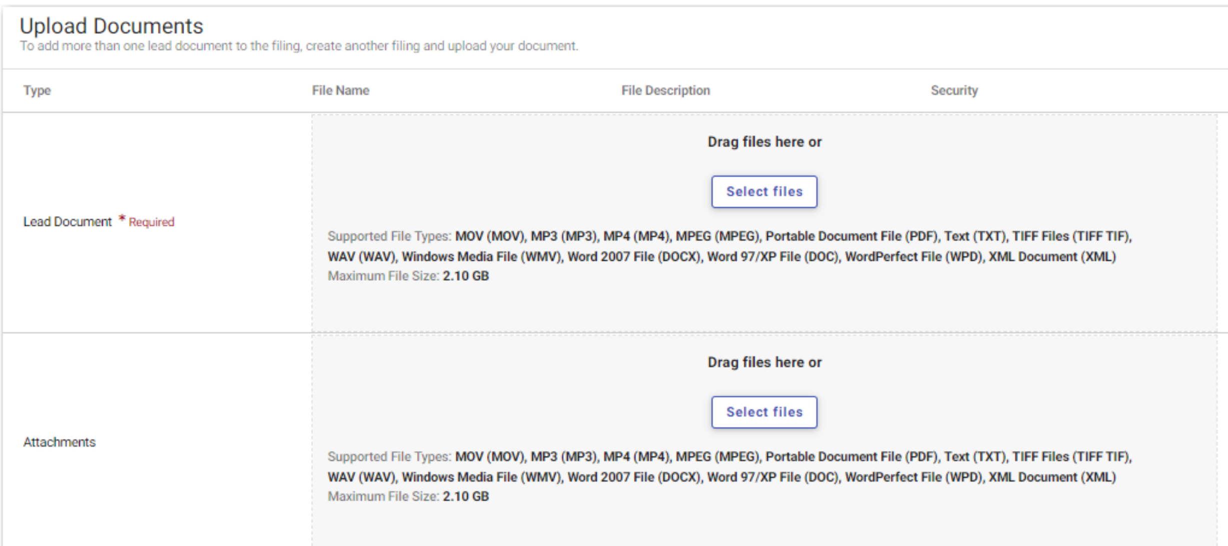
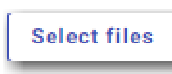



**Figure 9.42 – Upload Documents Pane**

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.

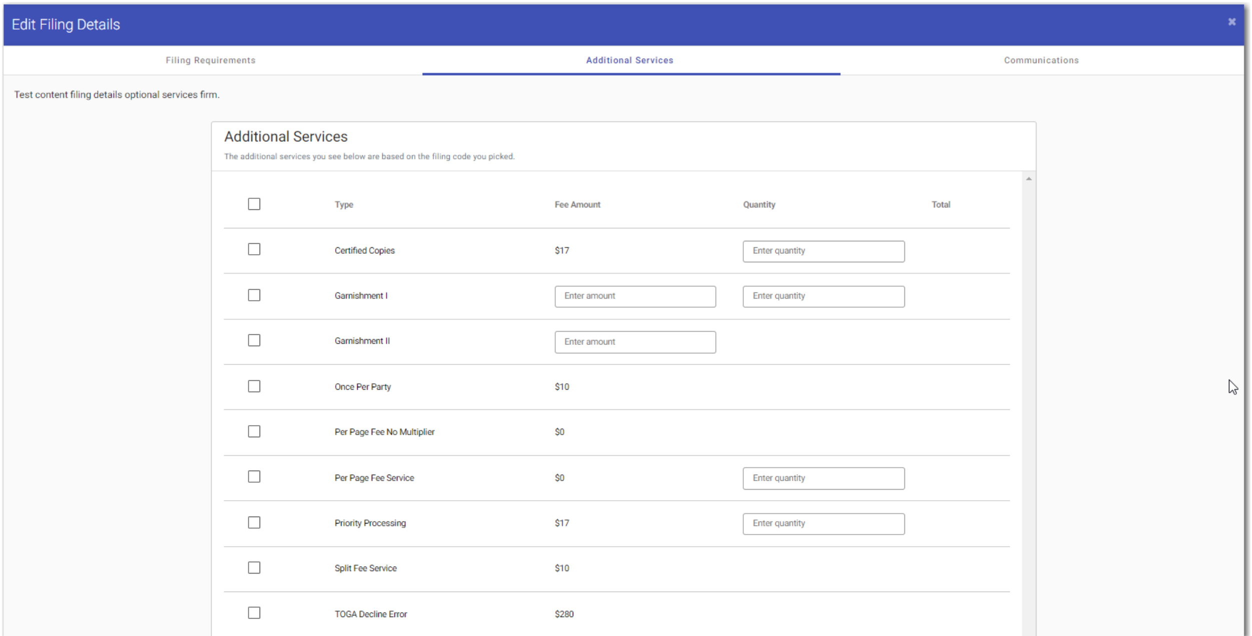



**Figure 9.43 – Additional Services Pane on the Edit Filing Details Page**

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.

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

    The Communications pane is displayed.

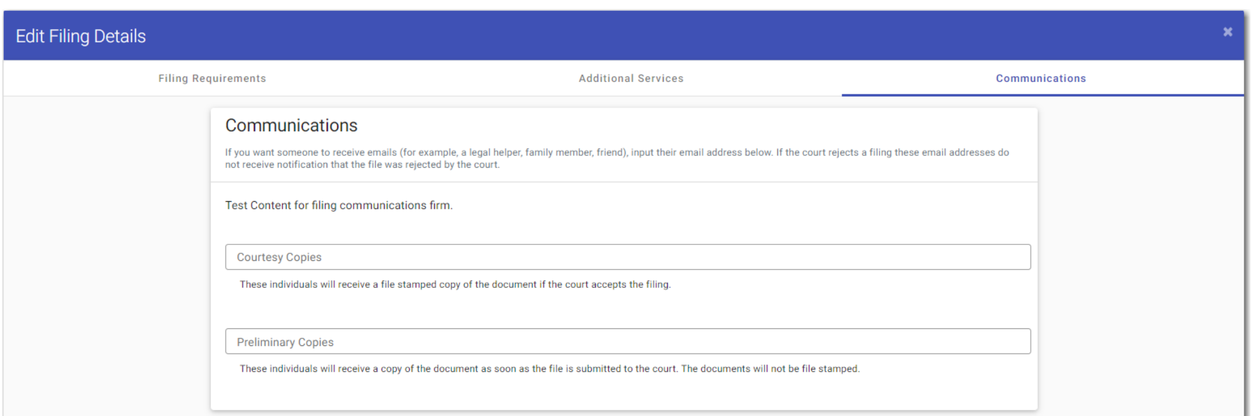



**Figure 9.44 – Communications Pane on the Edit Filing Details Page**

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

15. Click **Save**.

16. Click **Service →**.

    The *Service* page is displayed.

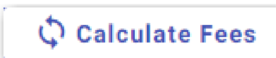
17. Select the service contacts, and then click 

.

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

.

    The fees for the filing are displayed.

23. Click 

 to review and complete your filing.

# Entering Payment Information

You can create a payment account before you begin your filing. You can also create a payment account during your filing from the *Fees* page.

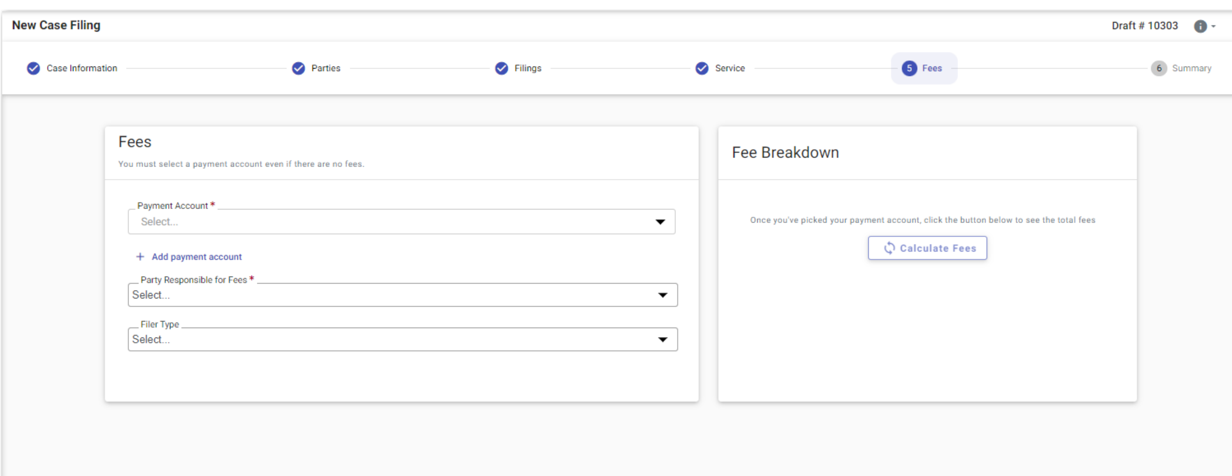



**Figure 9.45 – Example of a Fees Page**

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

To enter the payment information for your filing:

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

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 42
- Adding an E-Check Payment Account, page 46
- Adding a Draw-Down Account, page 50

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

4. In the Fee Breakdown pane, click **Calculate Fees**.

   The fees for the filing are displayed.

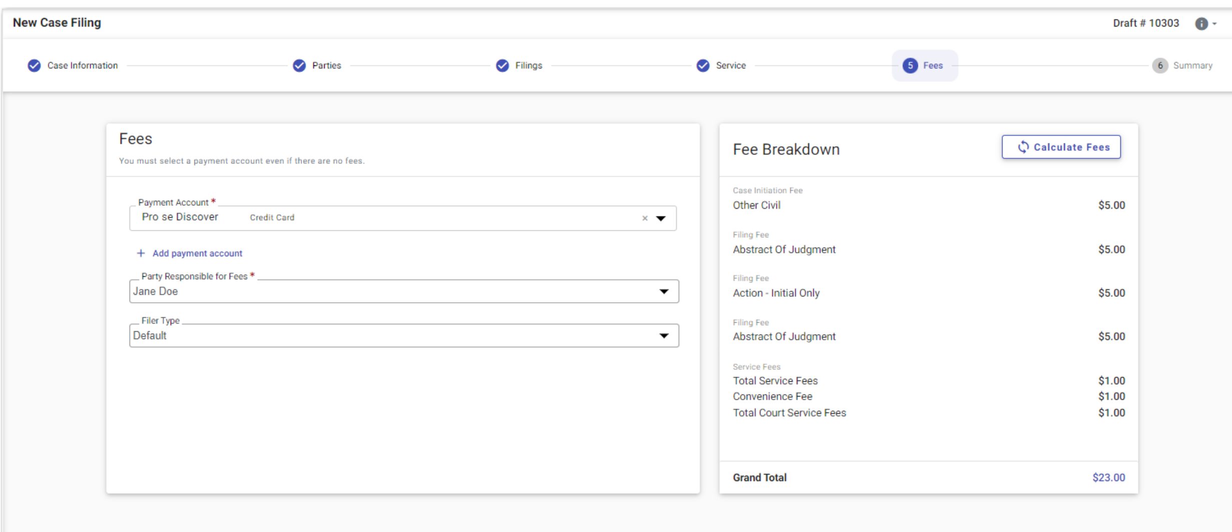



**Figure 9.46 – Example of a Fees Page with the Filing Fees Displayed**

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.**

5. 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.**

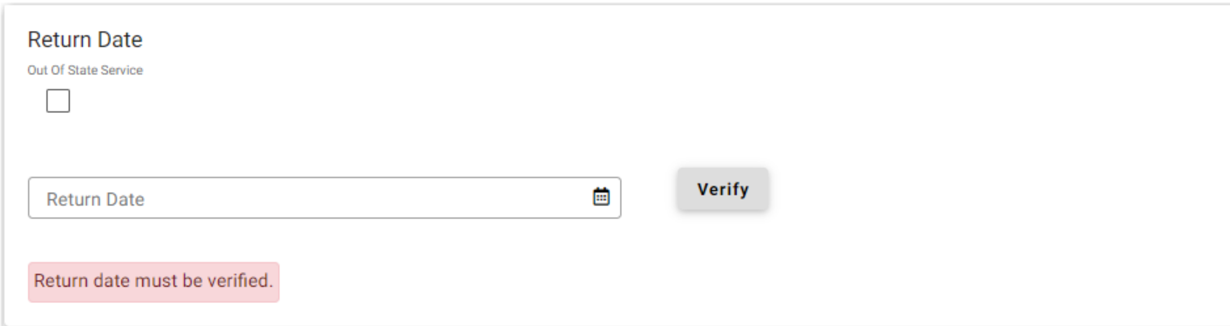



**Figure 9.47 – Example of the Return Date Pane**

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 9.48 – 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.

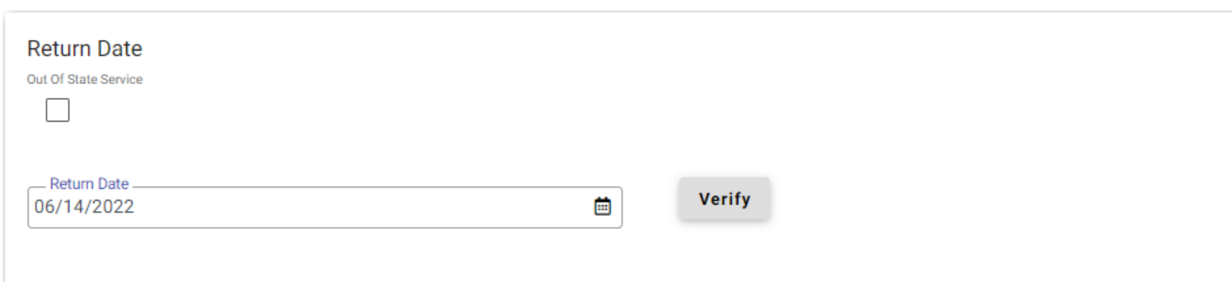



**Figure 9.49 – Example of the Return Date Pane with a Valid Date Displayed**

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.

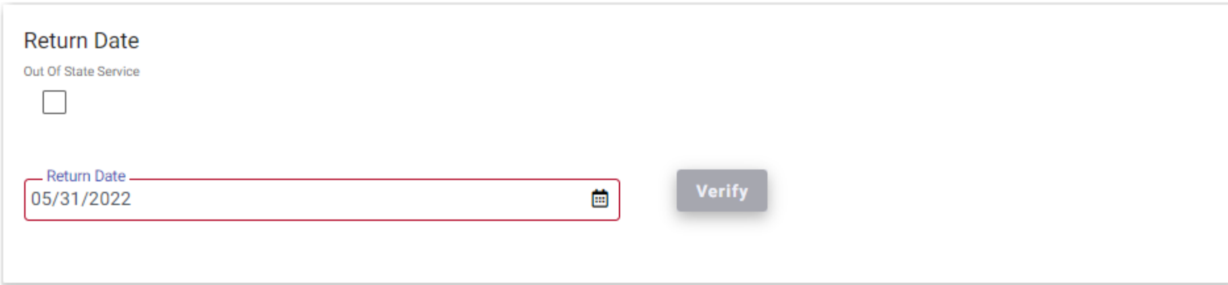



**Figure 9.50 – Example of the Return Date Pane with an Error in the Return Date Field**

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.

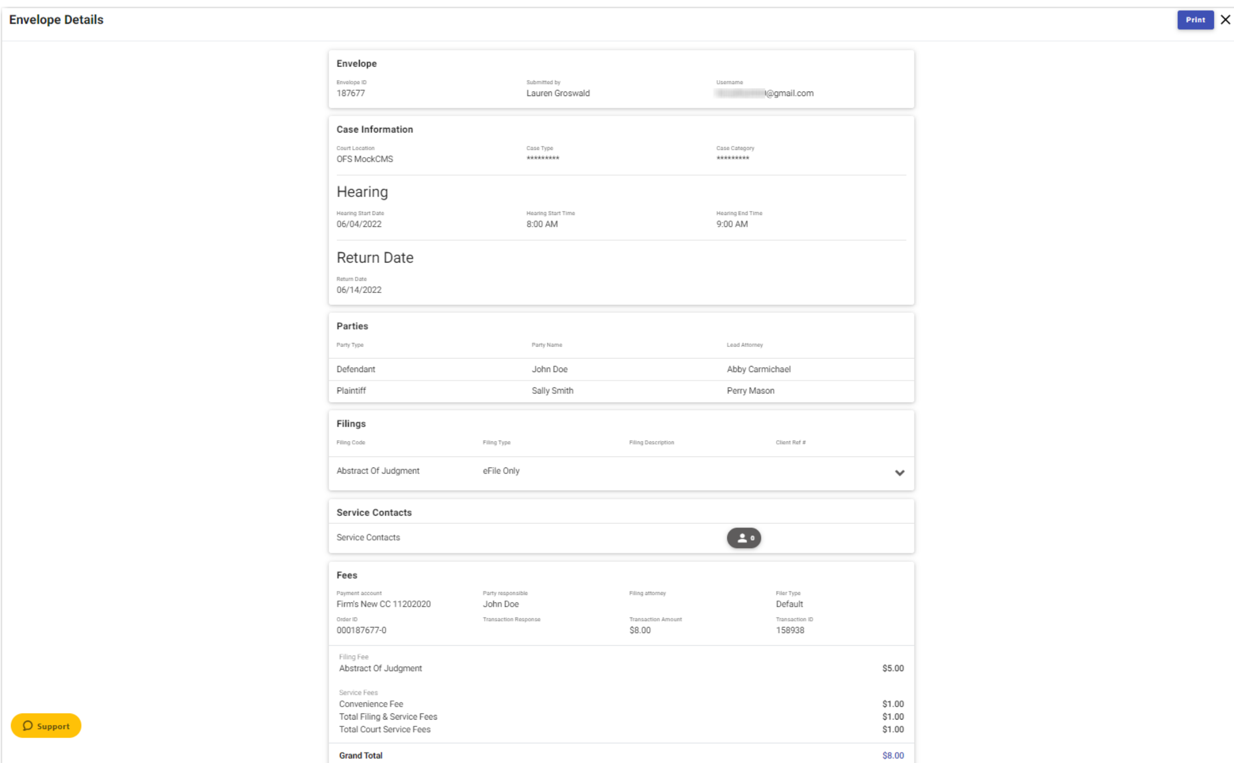



**Figure 9.51 – Example of the Return Date in the Envelope Details**

# 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 

.

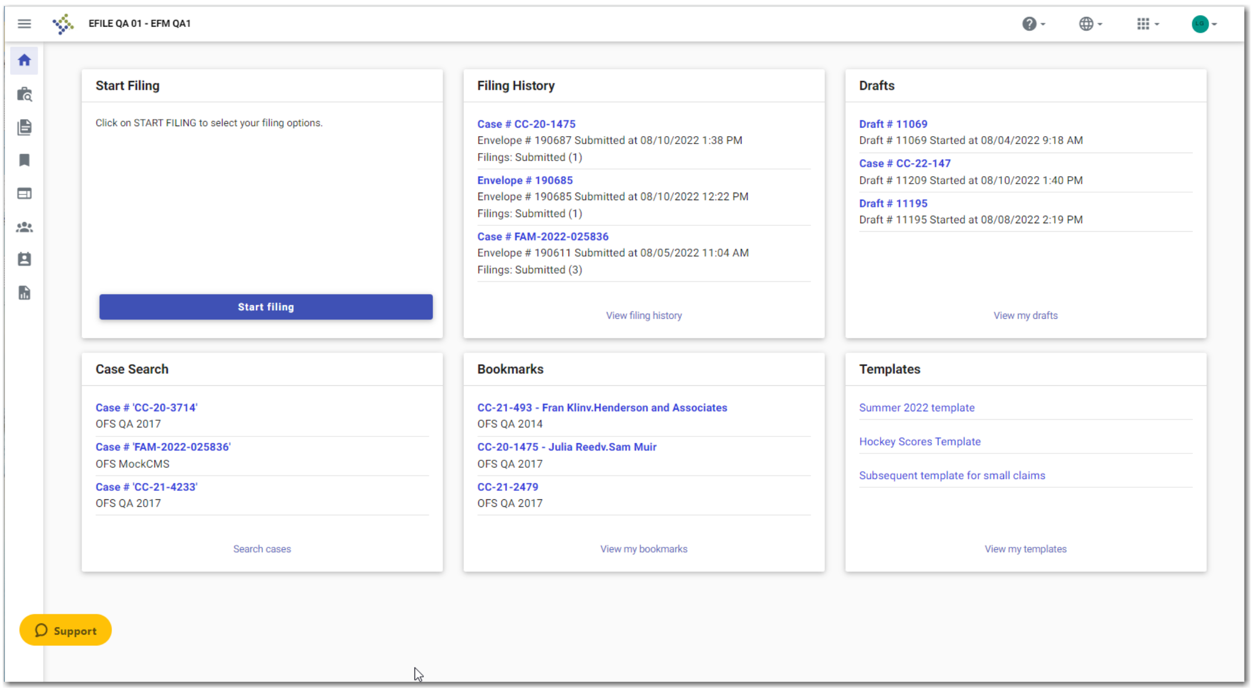



**Figure 9.52 – Example of a Dashboard Page**

The *Start Filing* page is displayed.

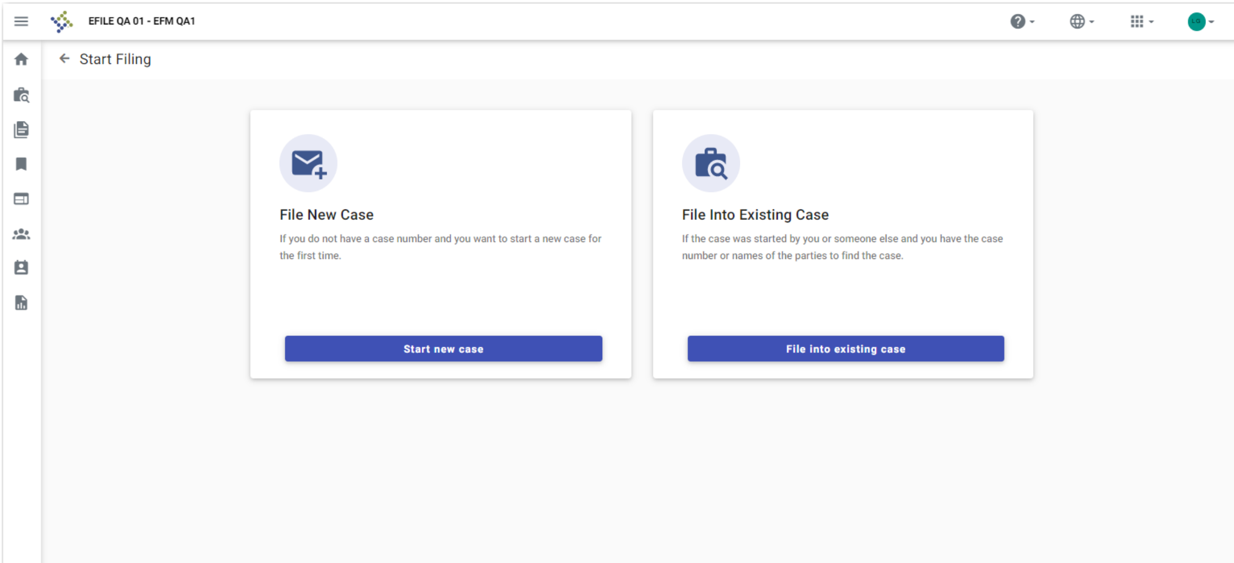



**Figure 9.53 – Start Filing Page**

2. Click **Start new case**.

   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 **Parties →**.

   The *Parties* page is displayed.

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

   The *Filings* page is displayed.

5. Complete the fields on the *Filings* page, and then click **Service →**.

   The *Service* page is displayed.

6. Select the service contacts, and then click **Fees →**.

   The *Fees* page is displayed.

7. Complete the fields on the *Fees* page, and then click **Summary →**.

   The *Summary* page is displayed.

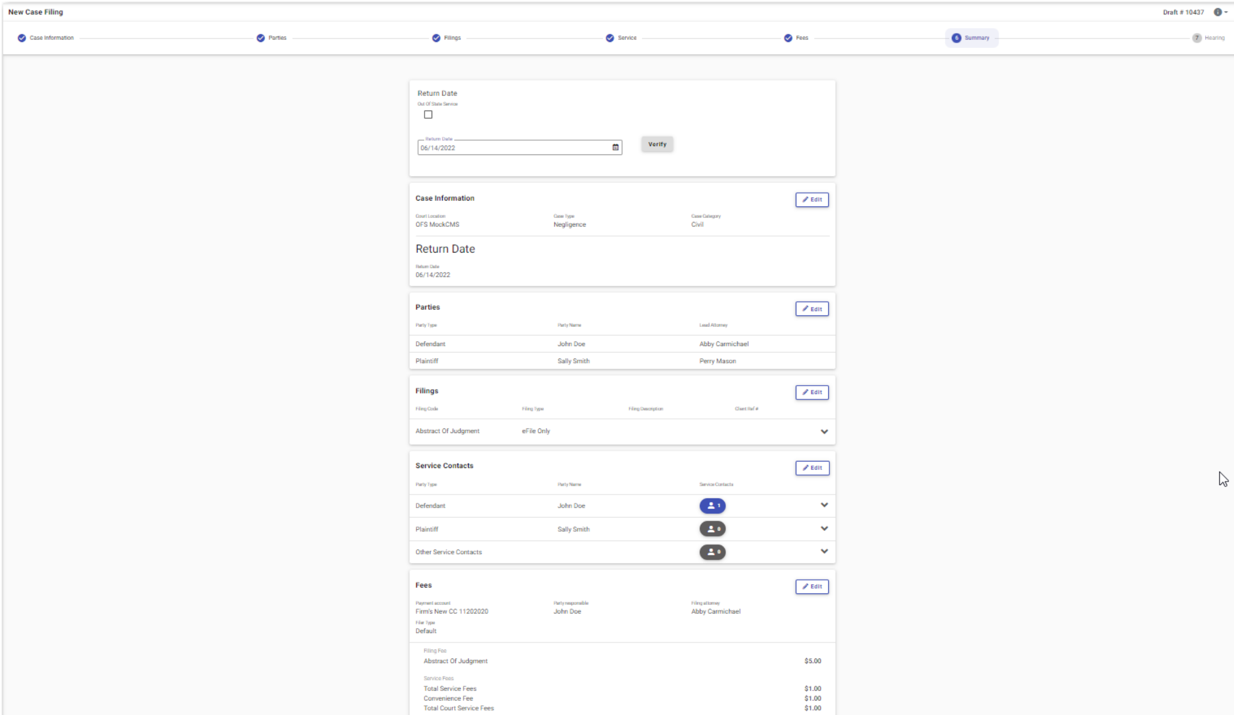


Figure 9.54 – Return Date Pane on the Summary Page

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.

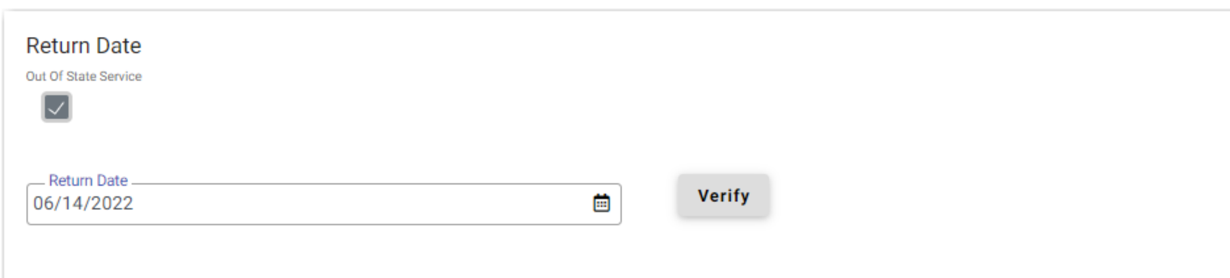
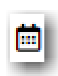



Figure 9.55 – Out of State Service Check Box Selected in the Return Date Pane

   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 9.56 – 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.

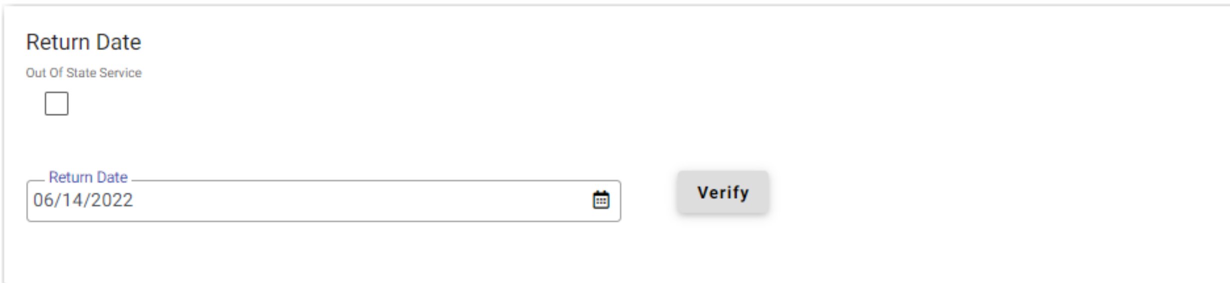



**Figure 9.57 – Example of the Return Date Pane with a Valid Date Displayed**

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.

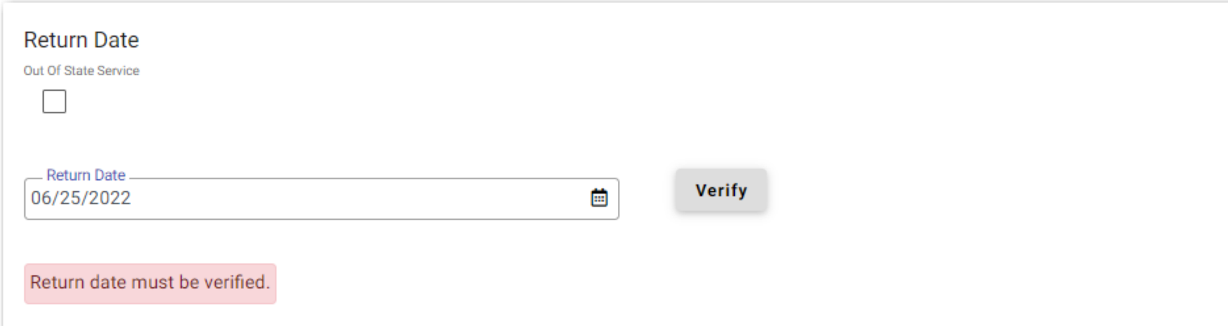



Figure 9.58 – Return Date Pane

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.

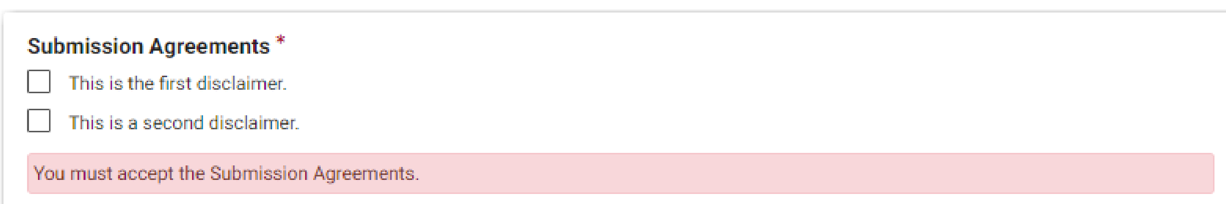



Figure 9.59 – Example of a Submission Agreements Pane with Two Disclaimers


Figure 9.60 – 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.

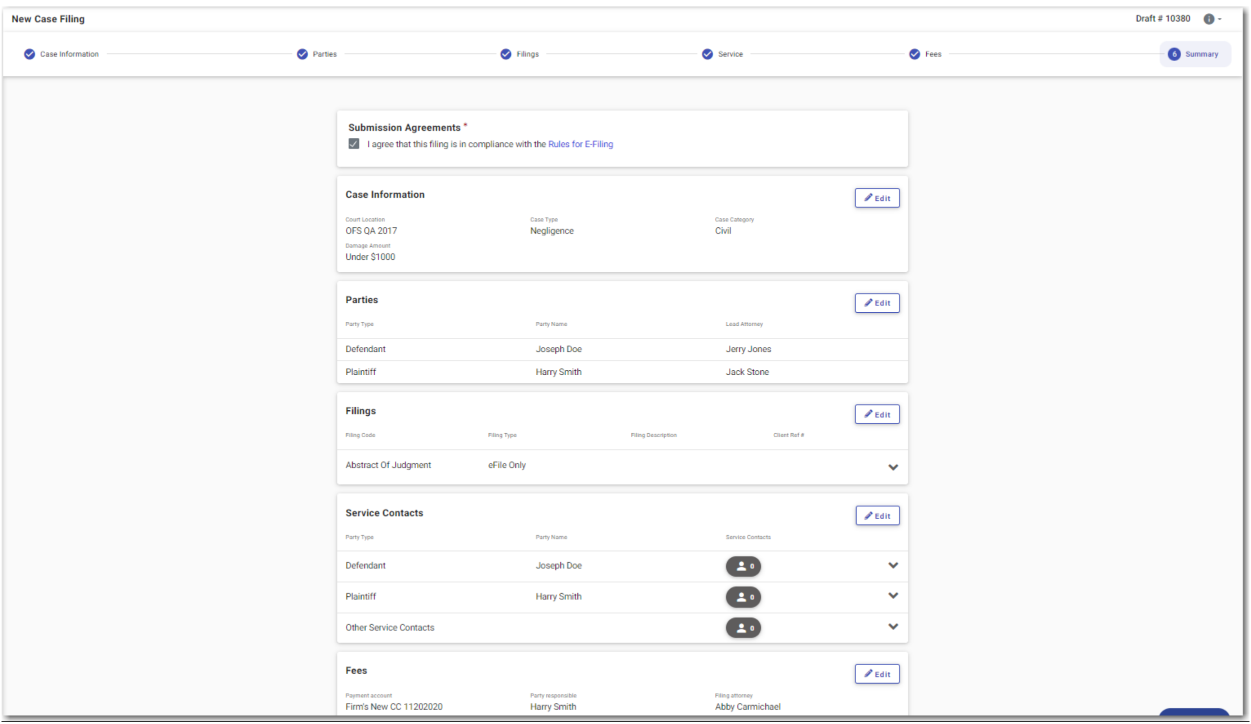



**Figure 9.61 – Example of a Summary Page**

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.**

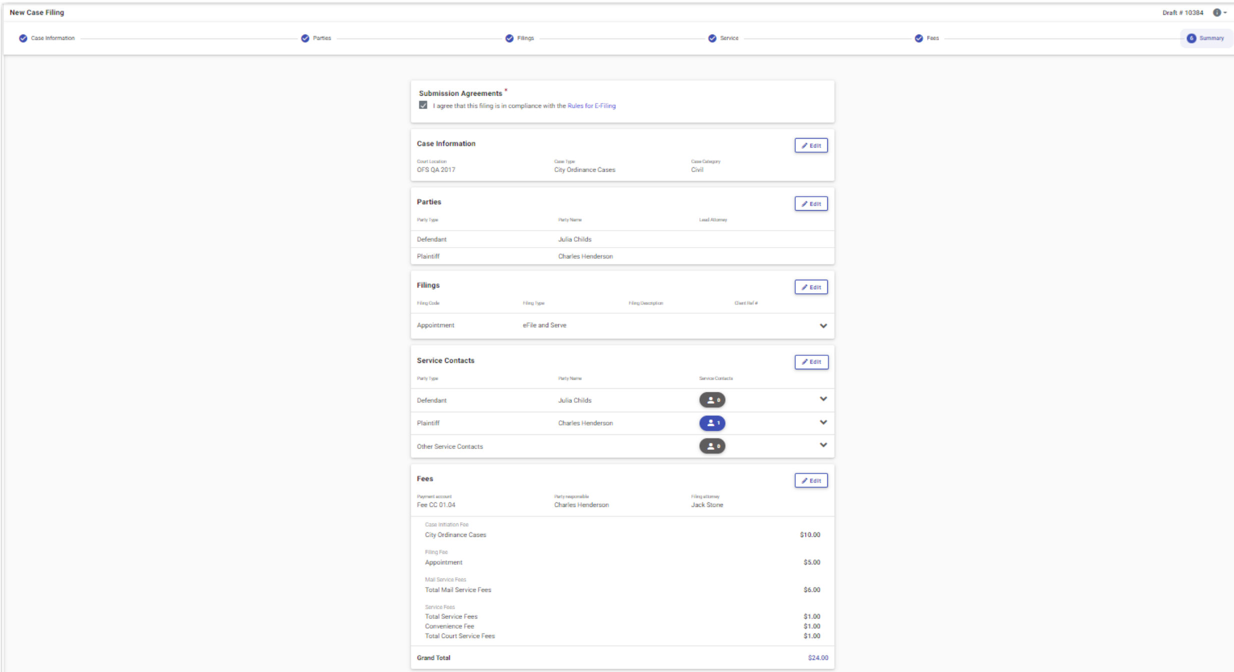



**Figure 9.62 – Example of a Summary Page with Mail Service Fees Displayed**

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.**

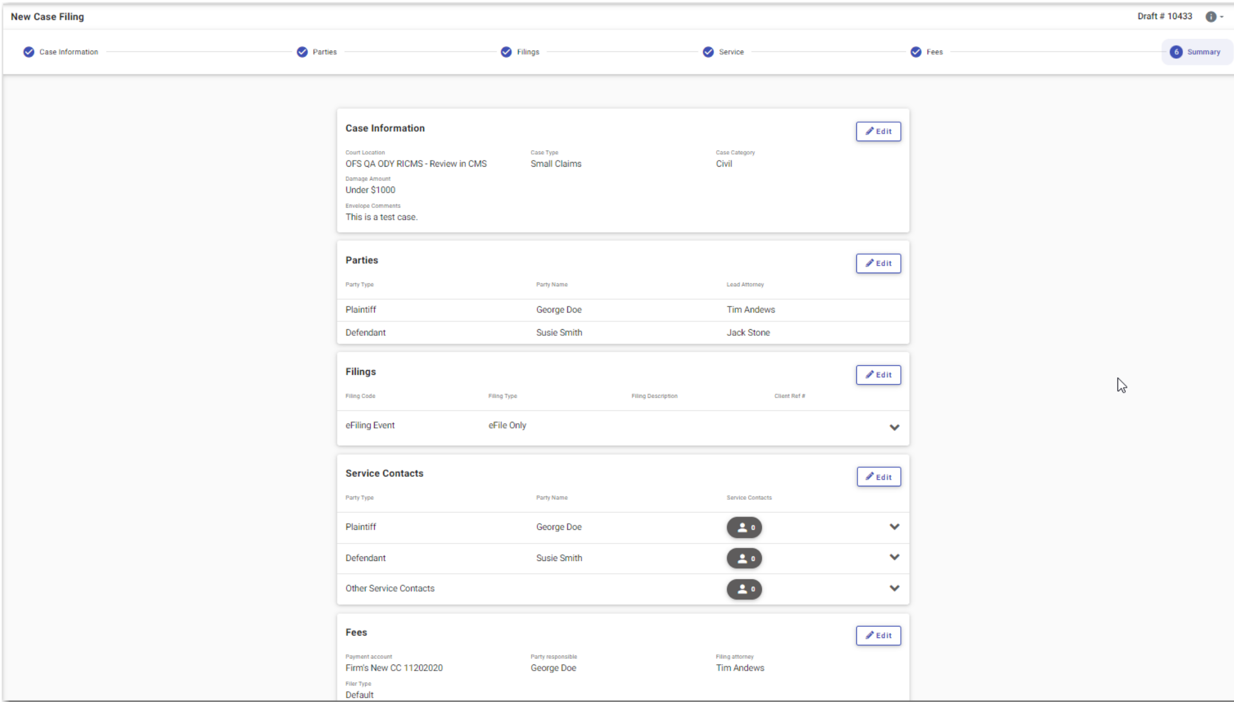



**Figure 9.63 – Example of a Summary Page with Envelope Comments Displayed**

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.

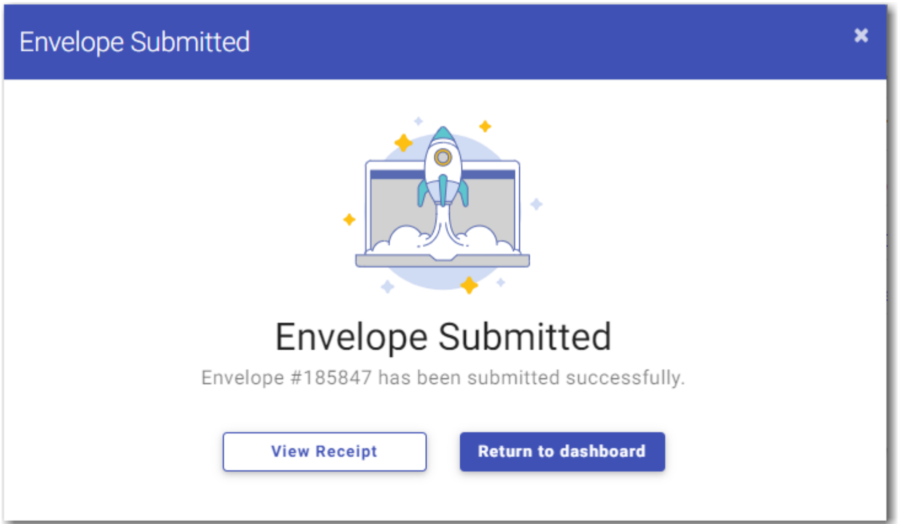



**Figure 9.64 – Envelope Submitted Window**

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.

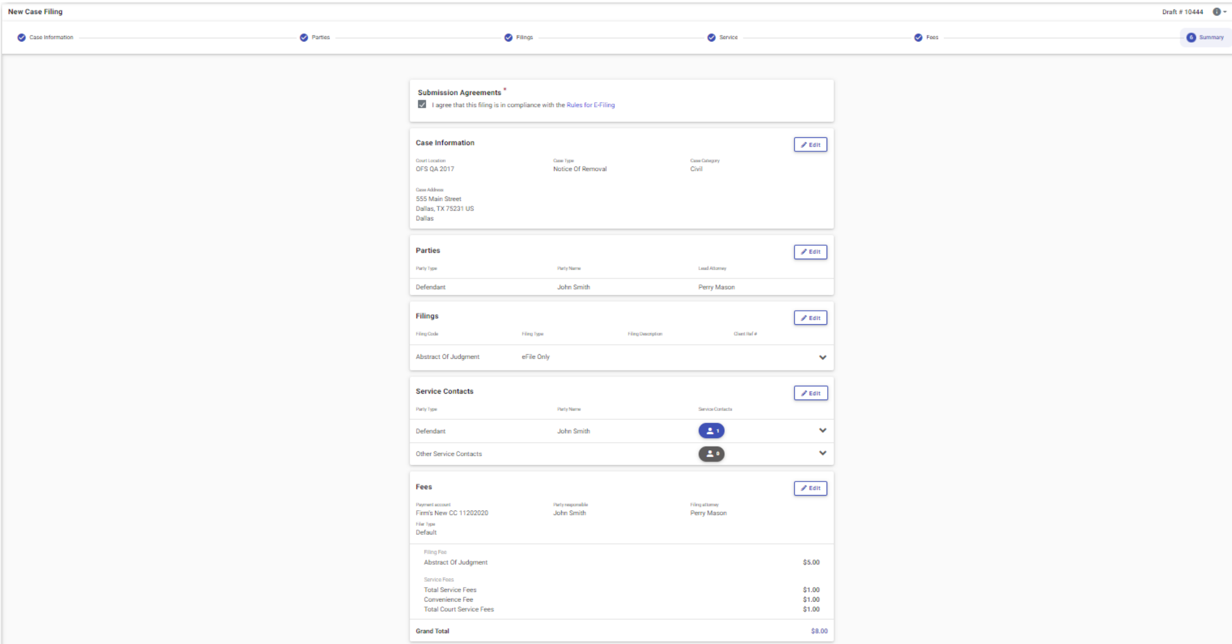



**Figure 9.65 – Case Address Information on the Summary Page**

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.

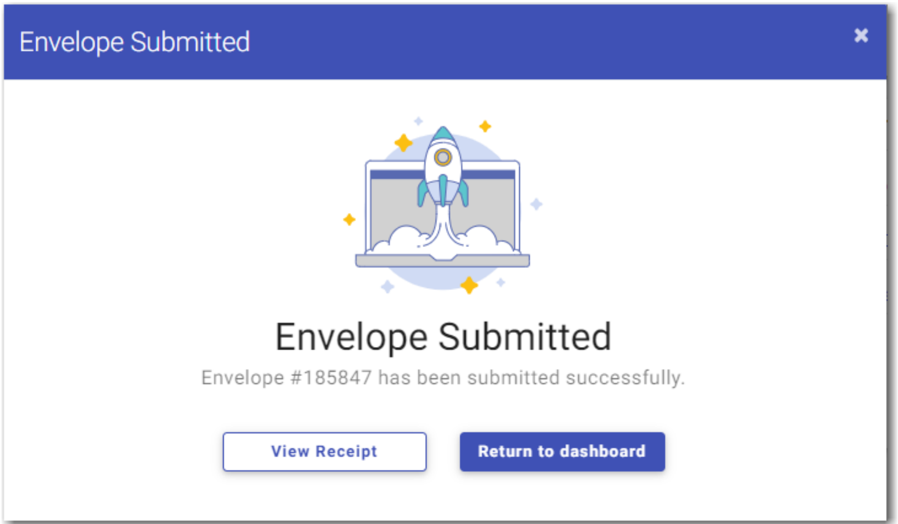



**Figure 9.66 – Envelope Submitted Window**

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

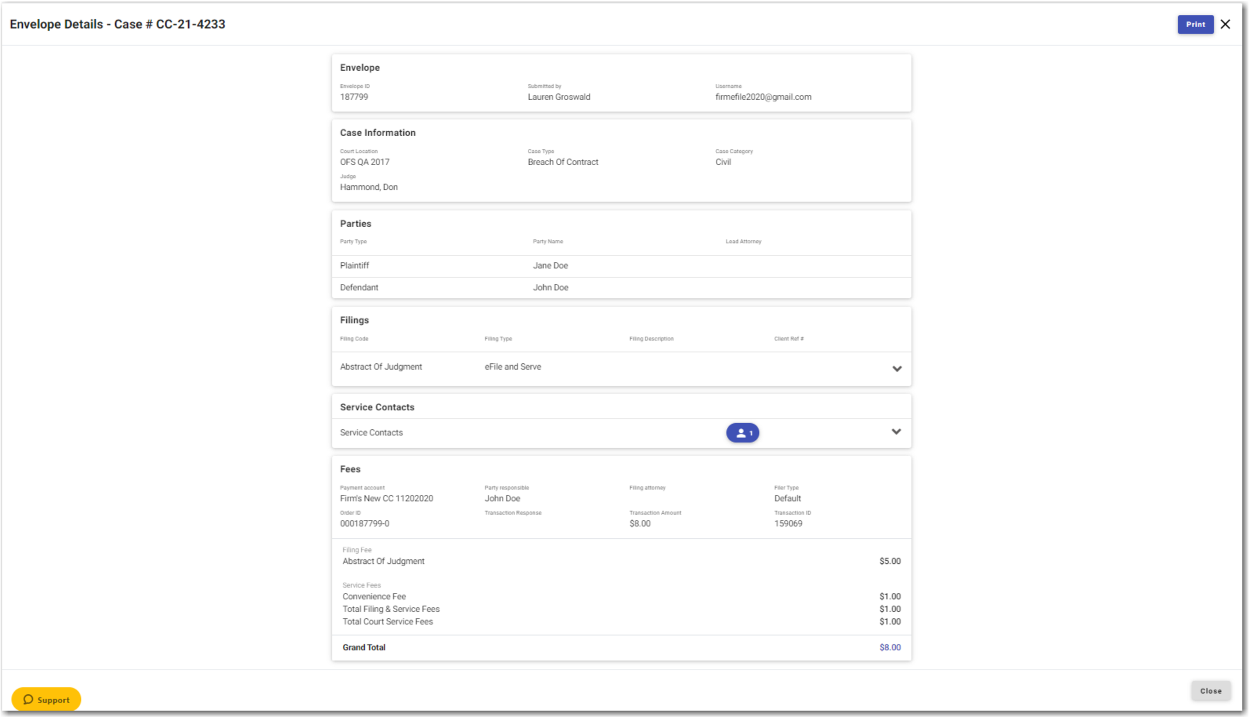



**Figure 9.67 – Example of the Judge Information on the Envelope Details Page**

- *Summary* page for subsequent filings

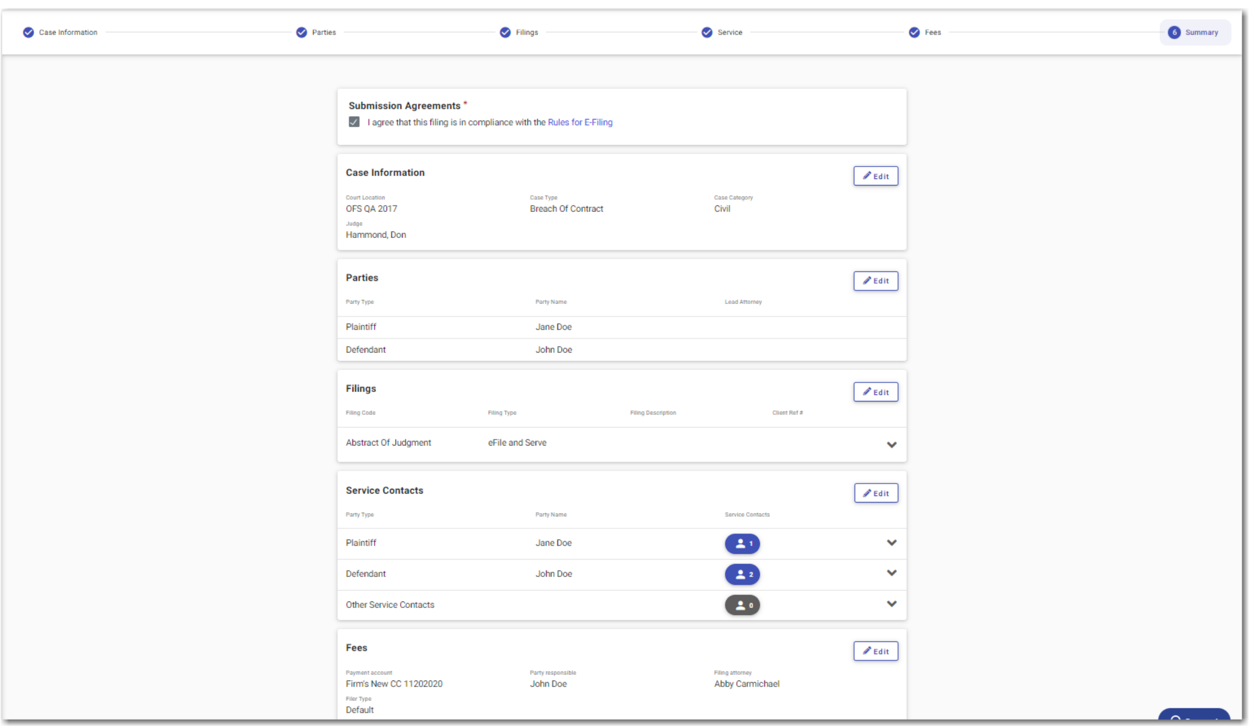



**Figure 9.68 – Example of the Judge Information on the Summary Page**

- *Case Information* page for subsequent filings

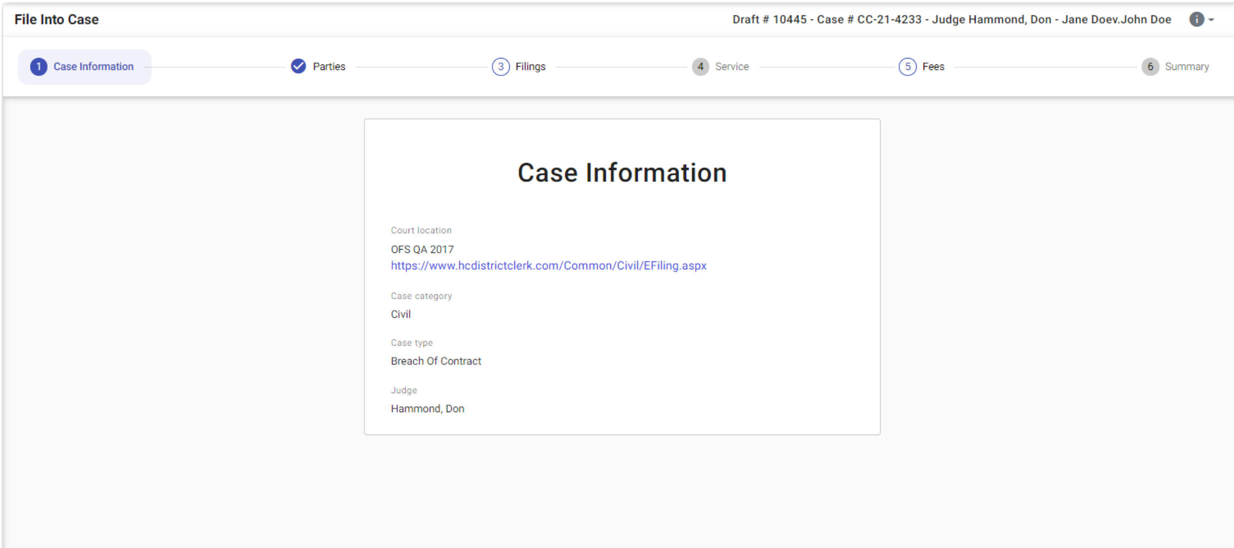



**Figure 9.69 – Example of the Judge Information on the Case Information Page**

- *Bookmarks* page for subsequent filings

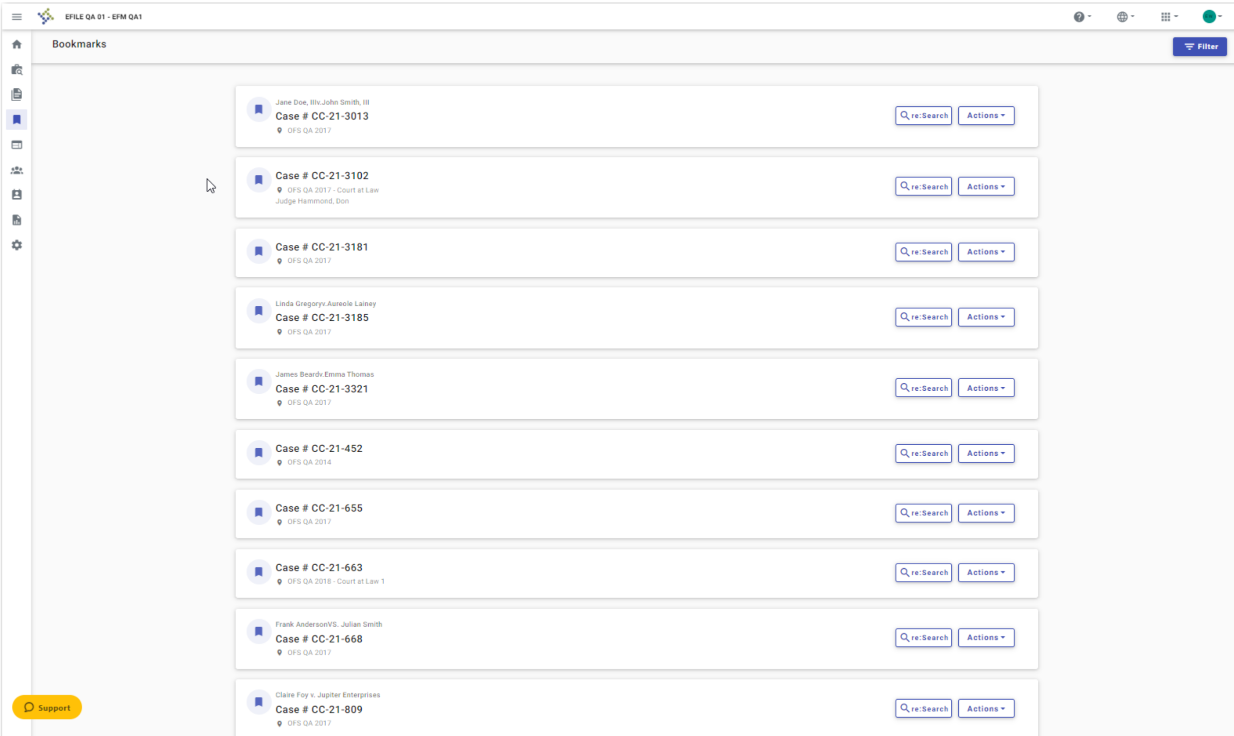



**Figure 9.70 – Example of the Judge Information on the Bookmarks Page**

# Capability for Hearing Dates

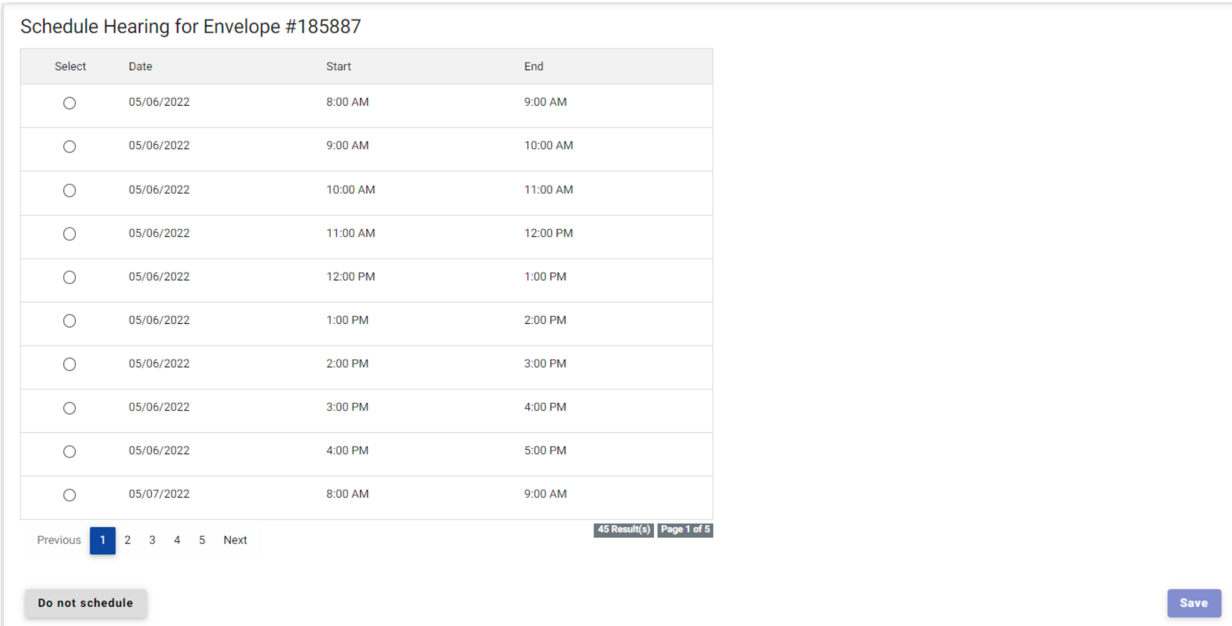
Filers can search for available hearing dates and then select a specified date. The hearing date is reserved in the system.

**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.

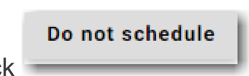
The filer schedules a hearing date and time on the *Schedule Hearing* page.


Schedule Hearing for Envelope #185887

| Select | Date | Start | End |
|---|---|---|---|
| ○ | 05/06/2022 | 8:00 AM | 9:00 AM |
| ○ | 05/06/2022 | 9:00 AM | 10:00 AM |
| ○ | 05/06/2022 | 10:00 AM | 11:00 AM |
| ○ | 05/06/2022 | 11:00 AM | 12:00 PM |
| ○ | 05/06/2022 | 12:00 PM | 1:00 PM |
| ○ | 05/06/2022 | 1:00 PM | 2:00 PM |
| ○ | 05/06/2022 | 2:00 PM | 3:00 PM |
| ○ | 05/06/2022 | 3:00 PM | 4:00 PM |
| ○ | 05/06/2022 | 4:00 PM | 5:00 PM |
| ○ | 05/07/2022 | 8:00 AM | 9:00 AM |



**Figure 9.71 – 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 

.

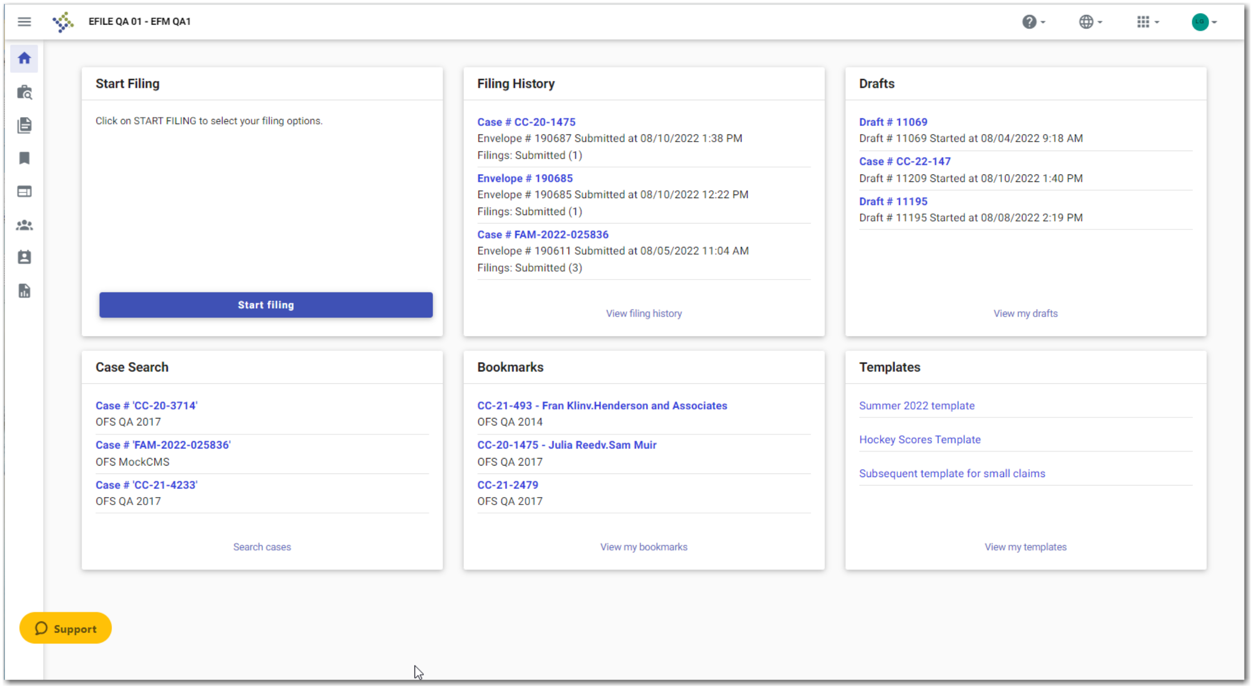



**Figure 9.72 – Example of a Dashboard Page**

The *Start Filing* page is displayed.

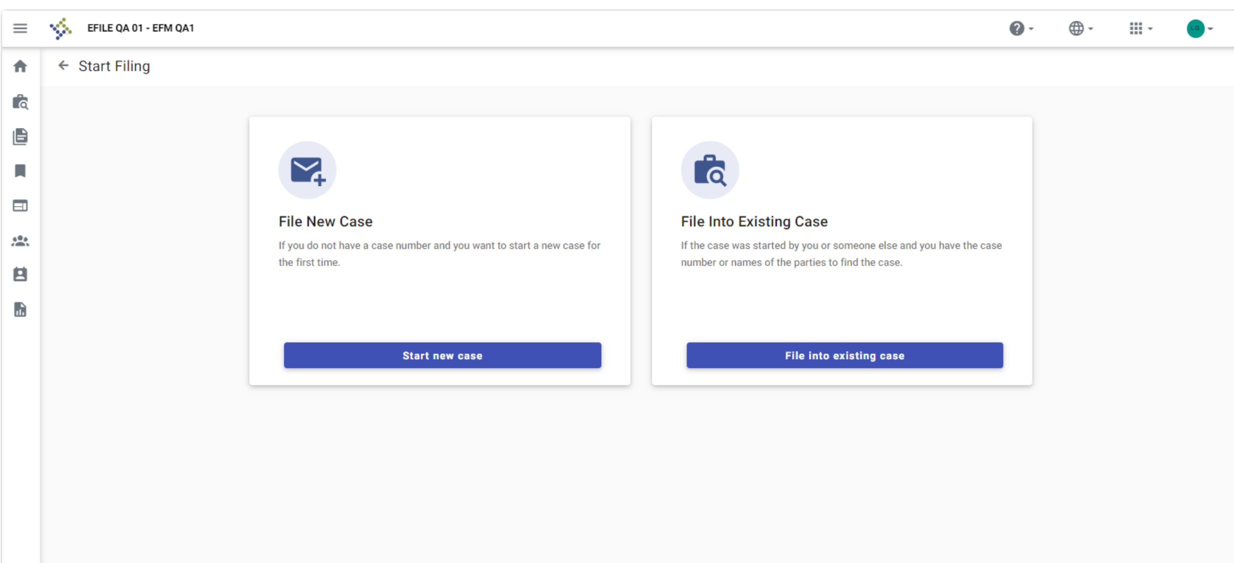



**Figure 9.73 – Start Filing Page**

2. Click 

.

The *Case Information* page is displayed.

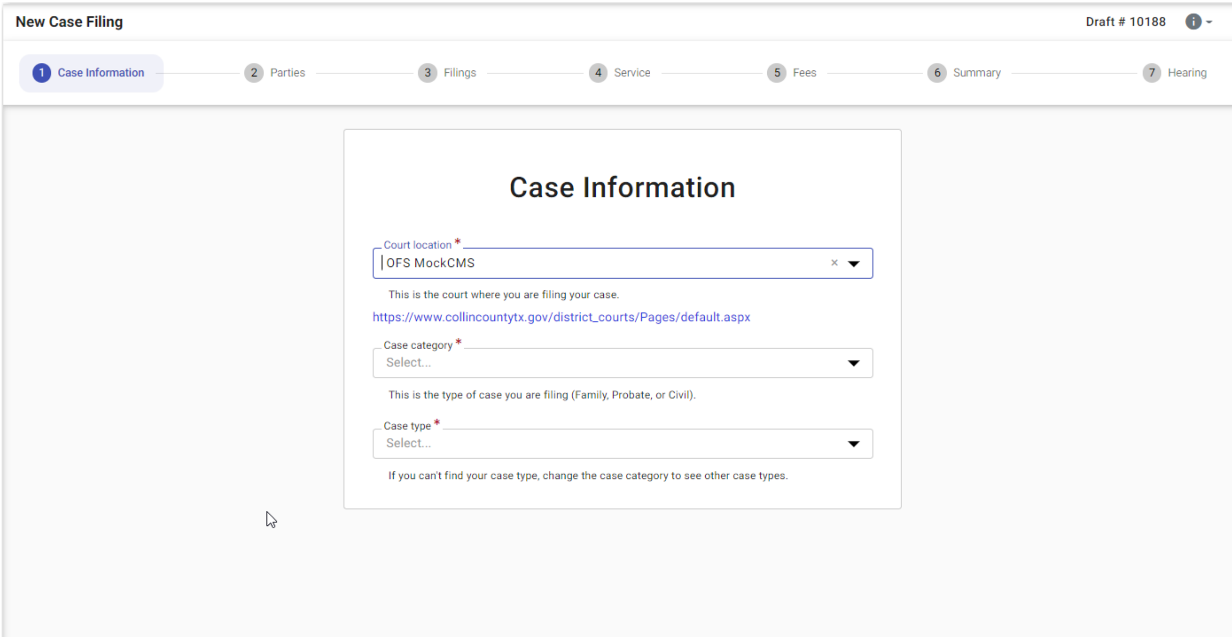



**Figure 9.74 – Case Information Page**

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

.

   The *Parties* page is displayed.

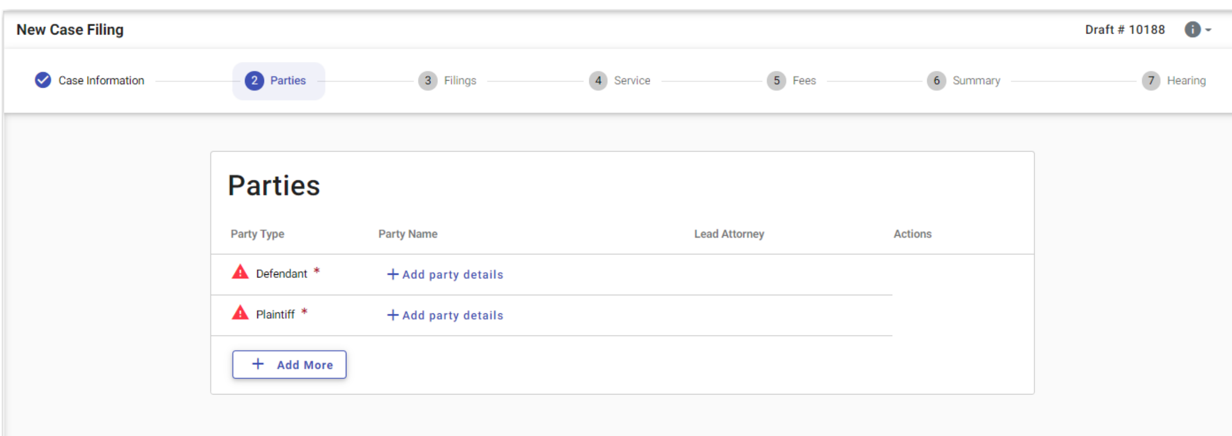



**Figure 9.75 – Parties Page**

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

.

   The *Filings* page is displayed.

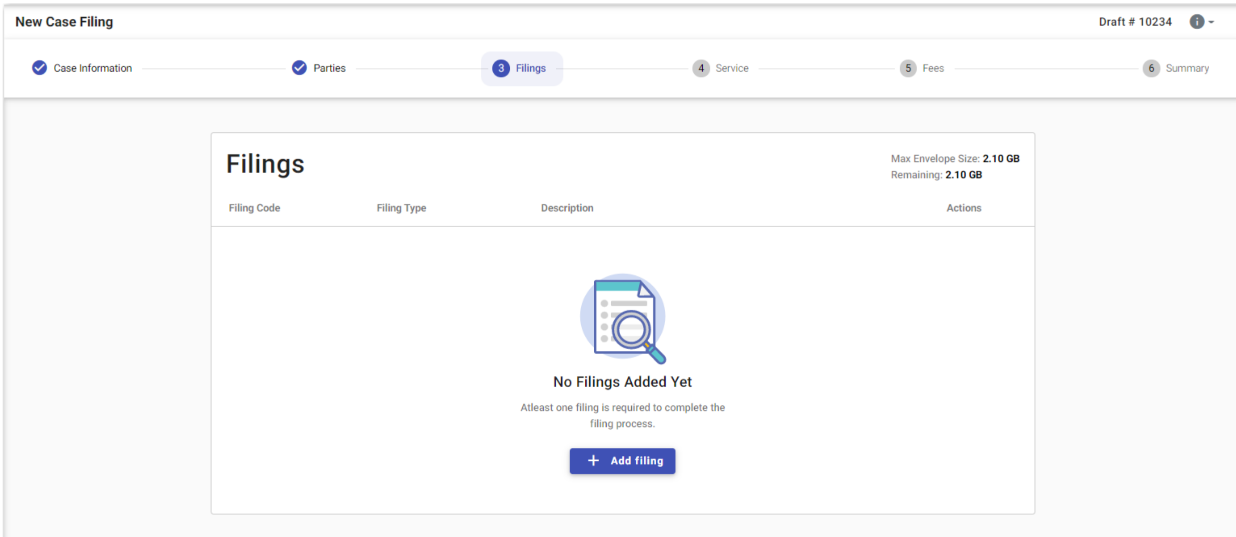



Figure 9.76 – Filings Page

5. On the *Filings* page, click  . Then complete the required fields, as applicable.
6. Click  .

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

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

   The *Summary* page is displayed.

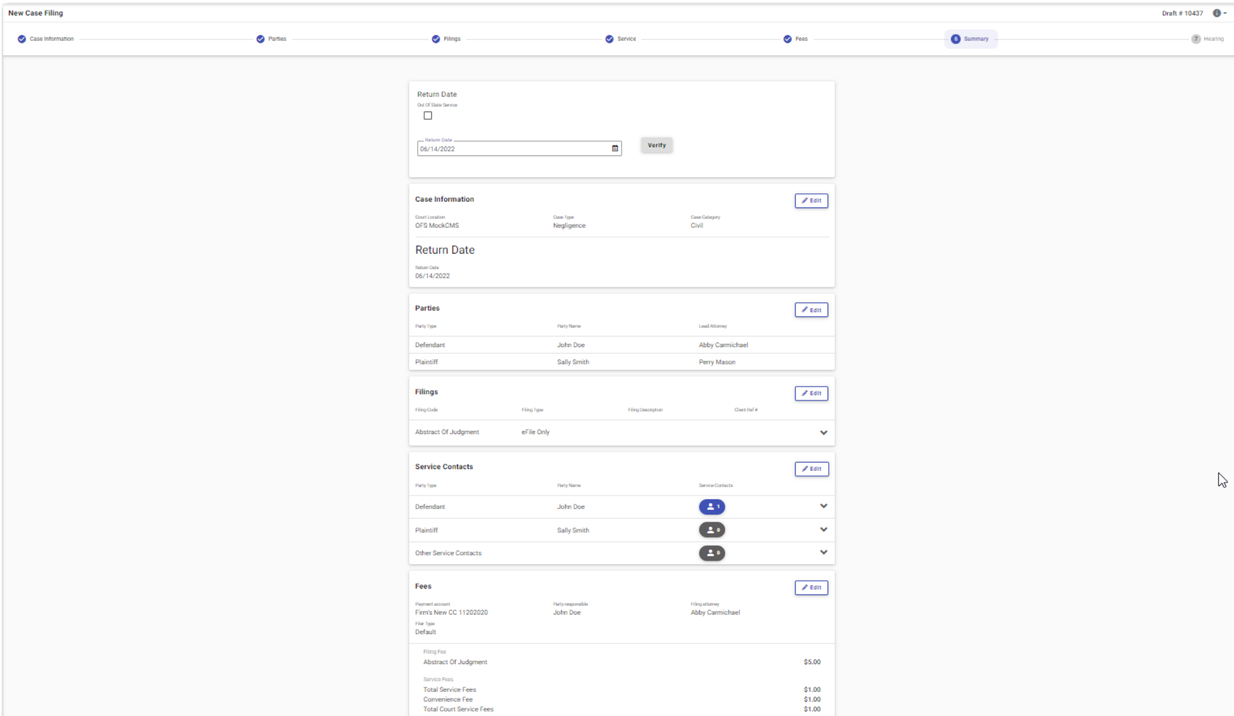



**Figure 9.77 – Example of a Summary Page**

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

.

The *Schedule Hearing* page is displayed.

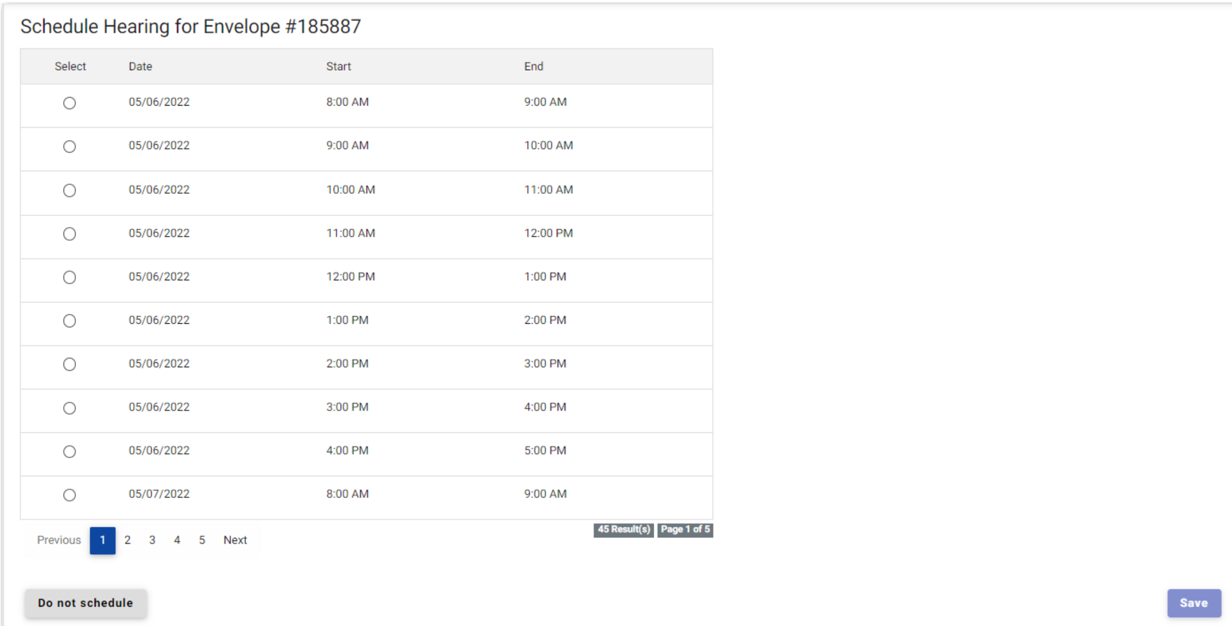


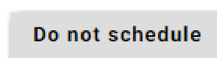

**Figure 9.78 – Example of a Schedule Hearing Page**

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.

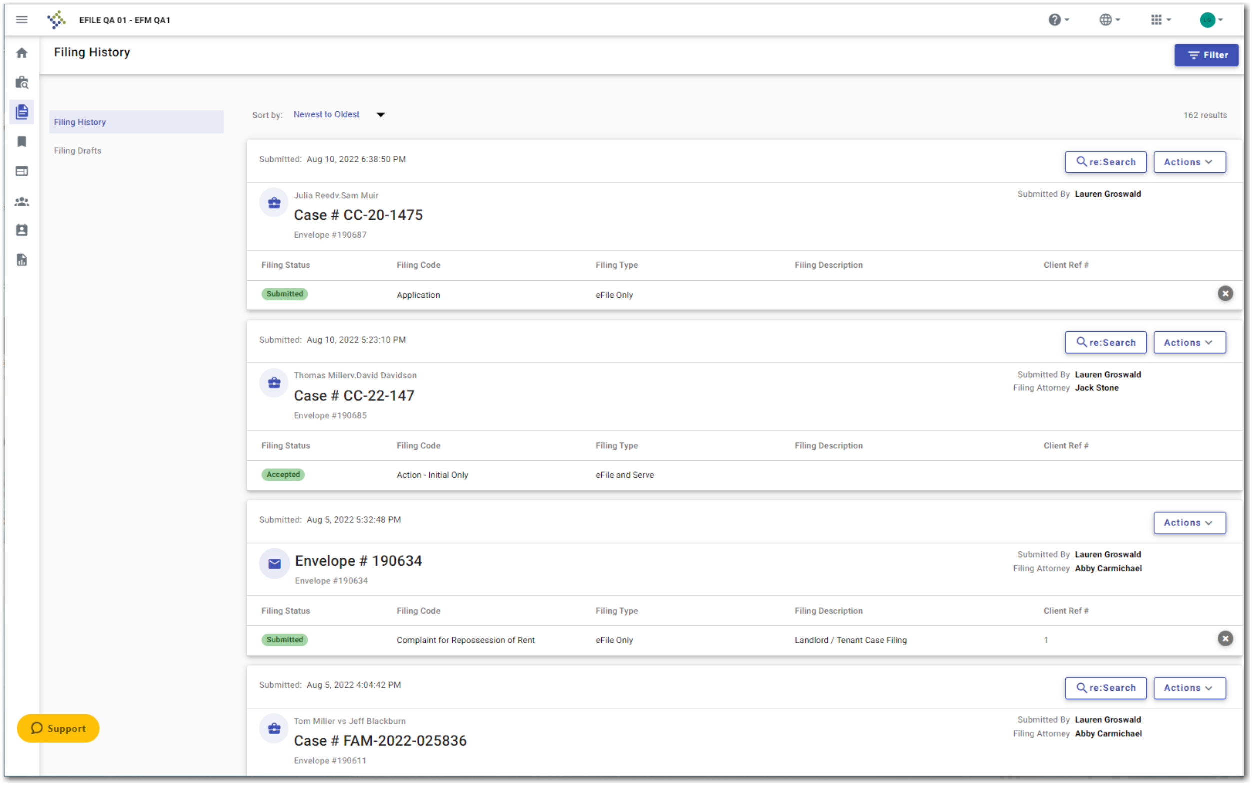
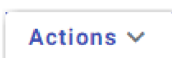



**Figure 9.79 – Example of a Filing History Page**

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.

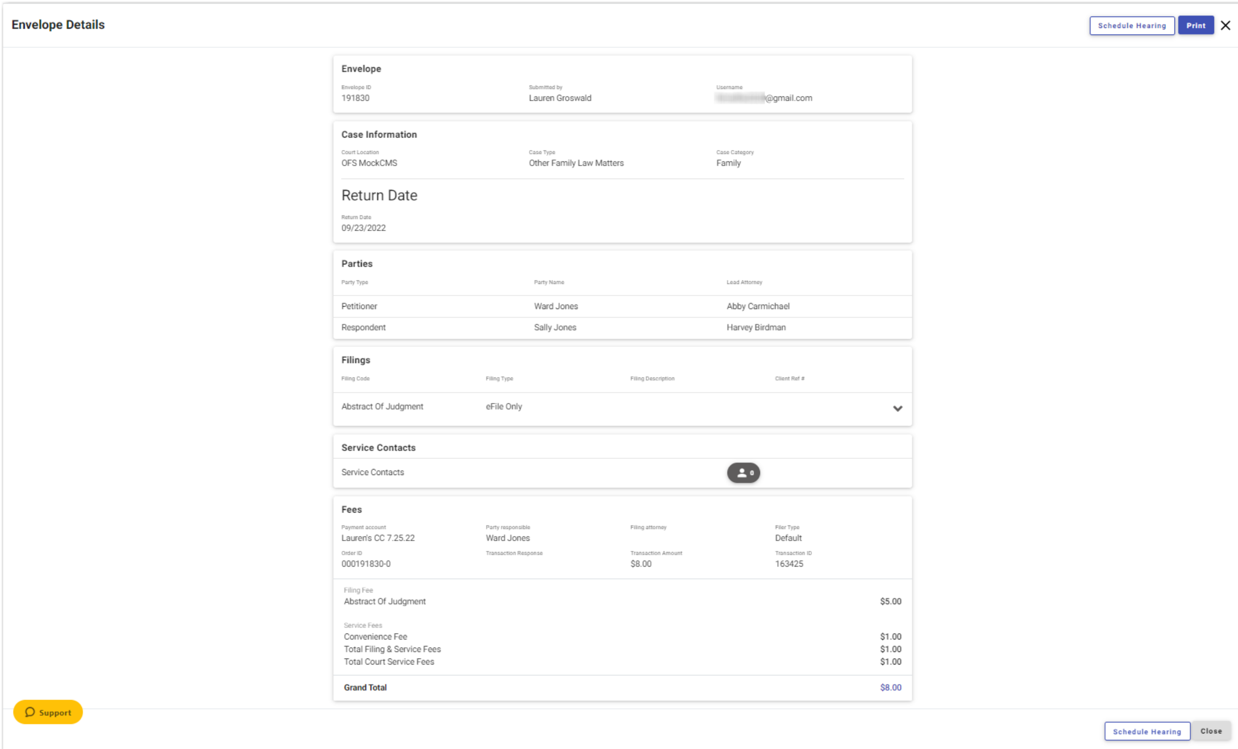



**Figure 9.80 – Example of an Envelope Details Page**

5. Click 

.

   The *Schedule Hearing* page is displayed.

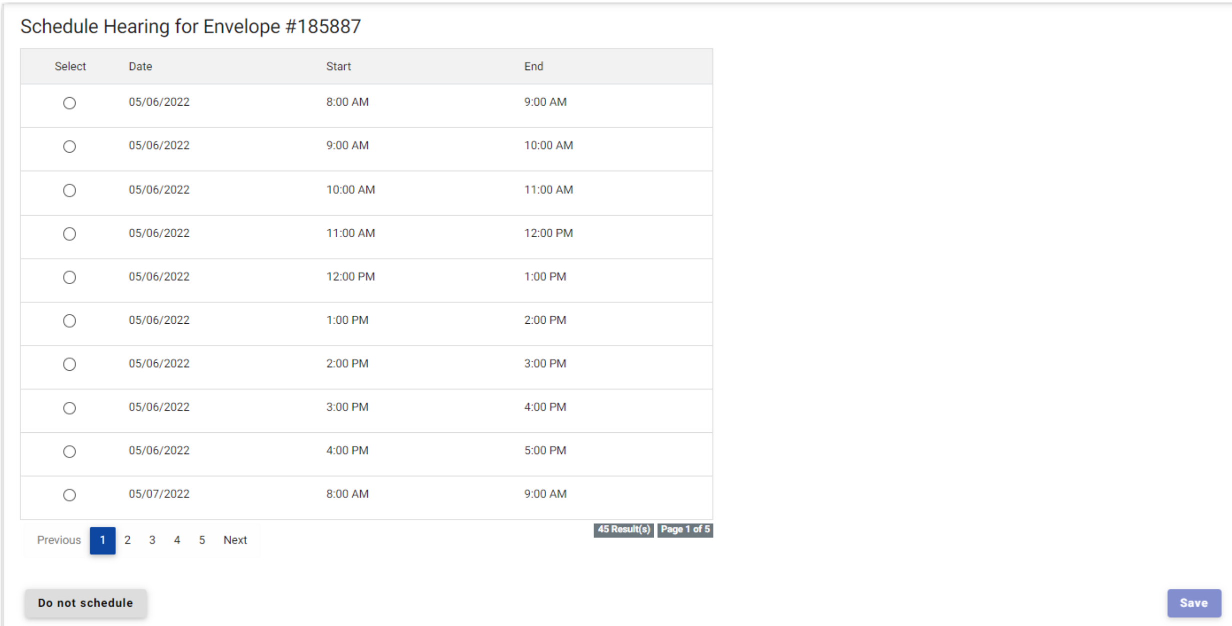



**Figure 9.81 – Example of a Schedule Hearing Page**

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.**

# 10 Auto Generated Documents

**Topics covered in this chapter**



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.**

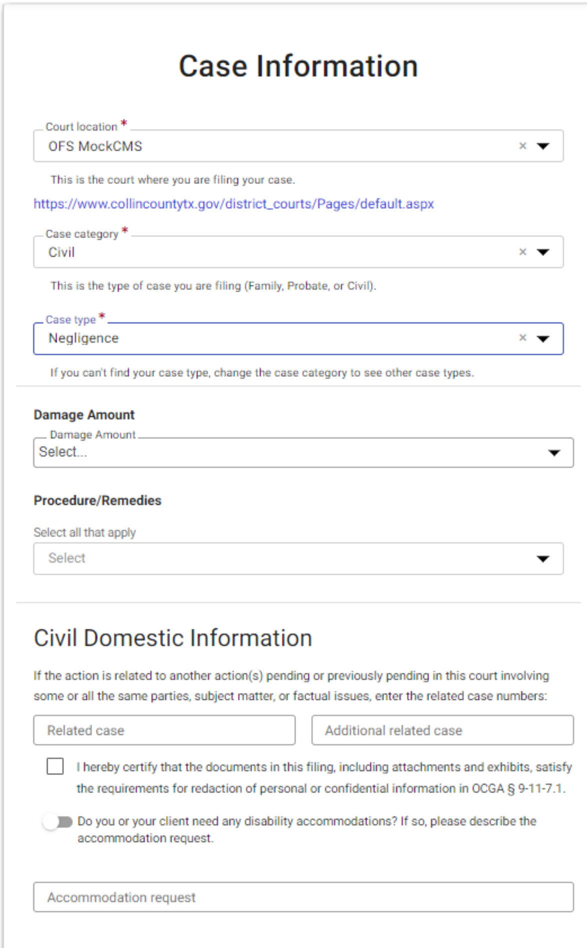



**Figure 10.1 – Civil Domestic Information Section on the Case Information Page**

**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.

9. If there is a disability accommodation to note, describe the accommodation in the **Accommodation request** field.
10. Click **Parties →** 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.**

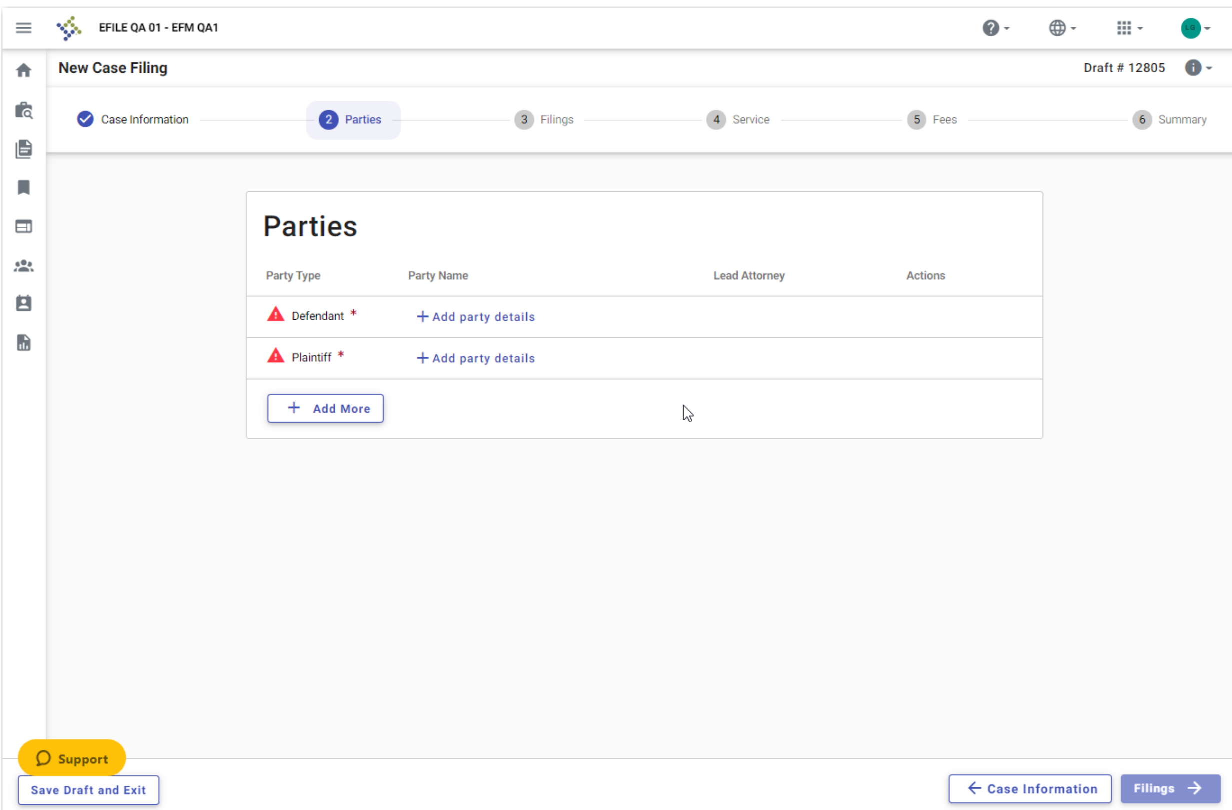



**Figure 10.2 – Example of a Parties Page**

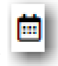
To enter Service of Process information on the *Parties* page:

1. 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.

2. Click either **Person** or **Entity**.

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

3. If you are the first party, select **I Am This Party**.
4. 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.
5. Type the party's date of birth in the **Date of Birth** field, or click  to select the date from the calendar.
6. Type the party case management system identification (ID) in the **Party CMS ID** field, if appropriate.
7. Select a language from the **Interpreter** drop-down list, if appropriate.
8. Select the type of driver's license from the **Drivers License Type** drop-down list.
9. Select the state where the driver's license was issued from the **Drivers License State** drop-down list.
10. Type the party's driver's license number in the **Drivers License Number** field.
11. 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.**

12. Select the party's gender from the **Gender** drop-down list.
13. If available, select an option from the **Service of Process** drop-down list.
14. In the Contact Information pane, enter the country, address, city, state, ZIP code, and phone number for the specified party.
15. In the Attorney Information pane, from the **Lead Attorney** drop-down list, select **Pro Se** for the filing attorney.
16. After all of the required fields for the specified party are completed, click **Save**.
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 **+ Add More**, 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 **Filings →** 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.**

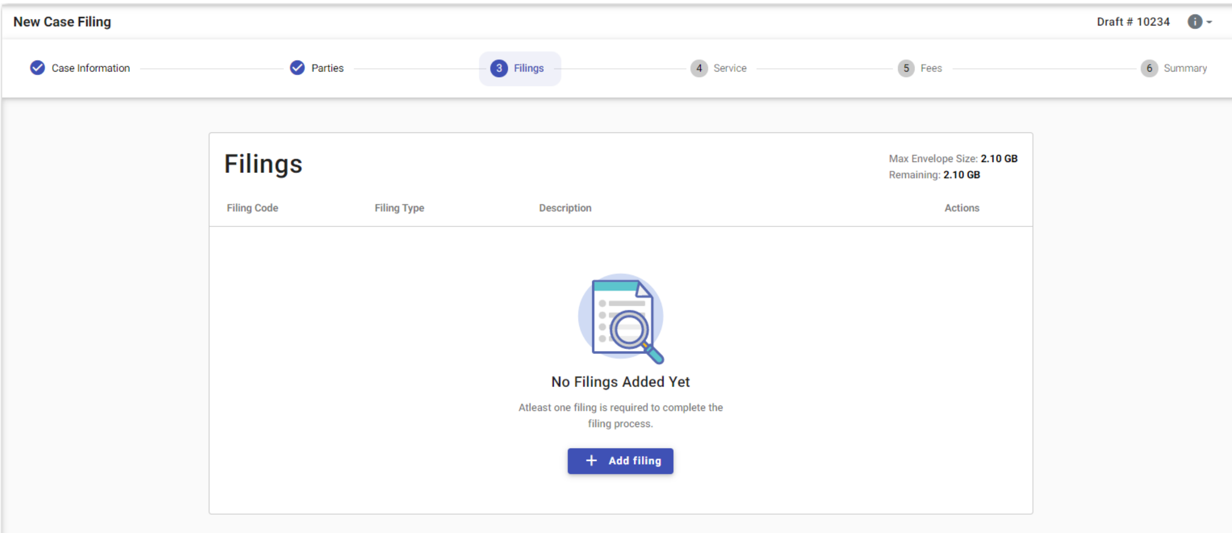
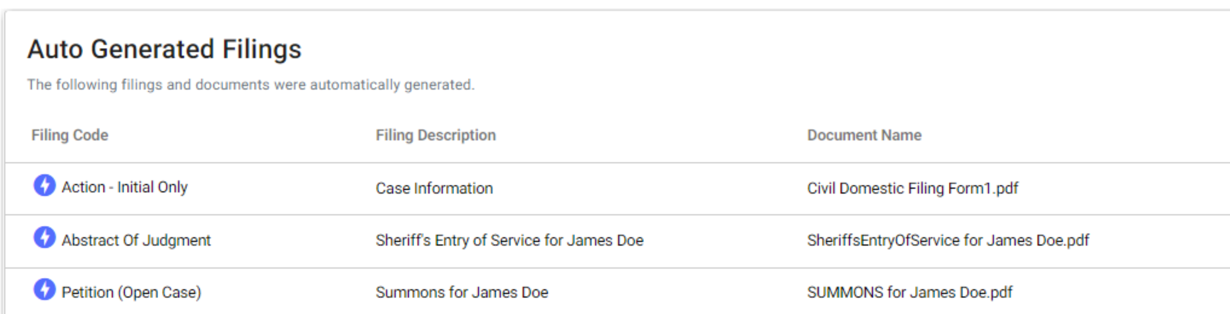



**Figure 10.3 – Filings Page**



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 10.4 – 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.

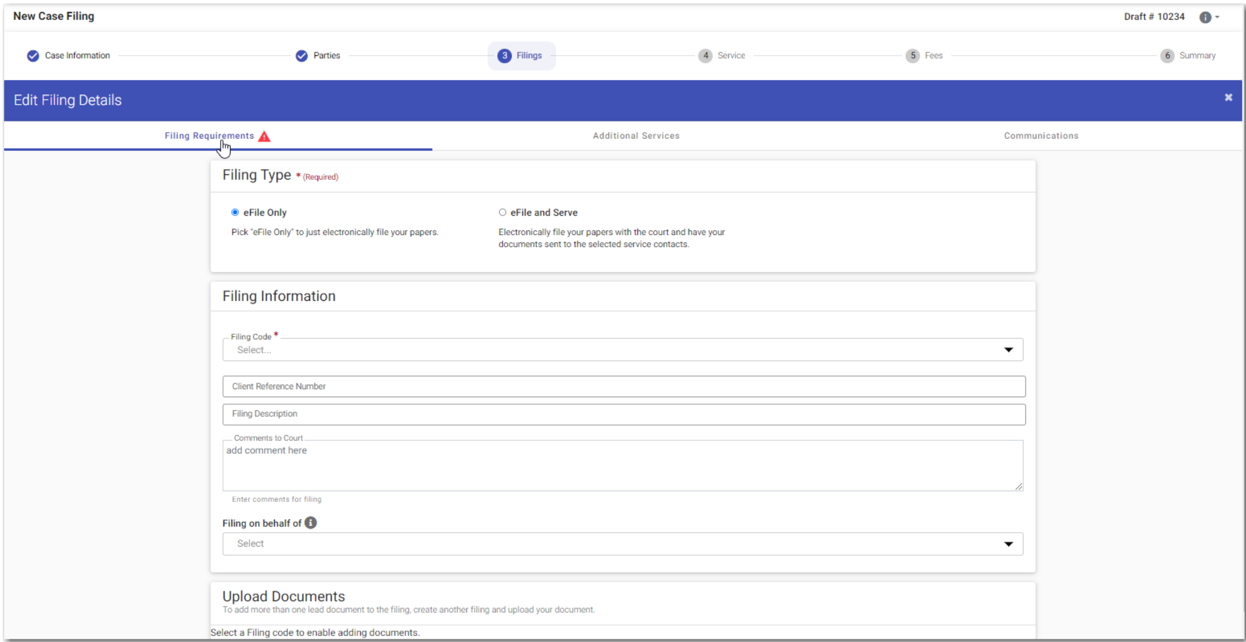
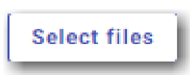



**Figure 10.5 – Edit Filing Details Page**

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."**

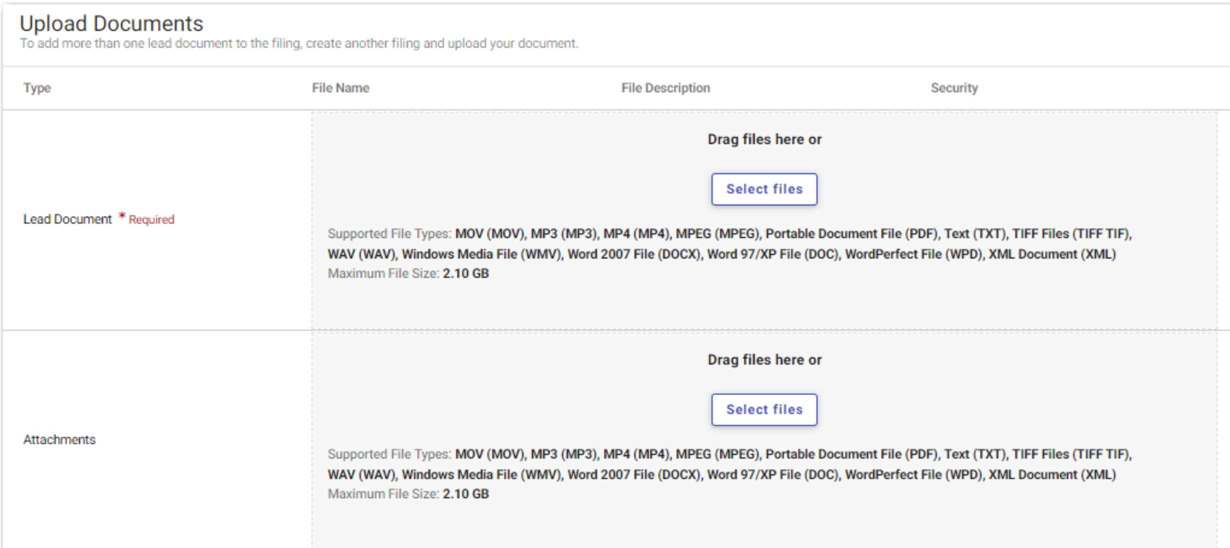



**Figure 10.6 – Upload Documents Pane**

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.

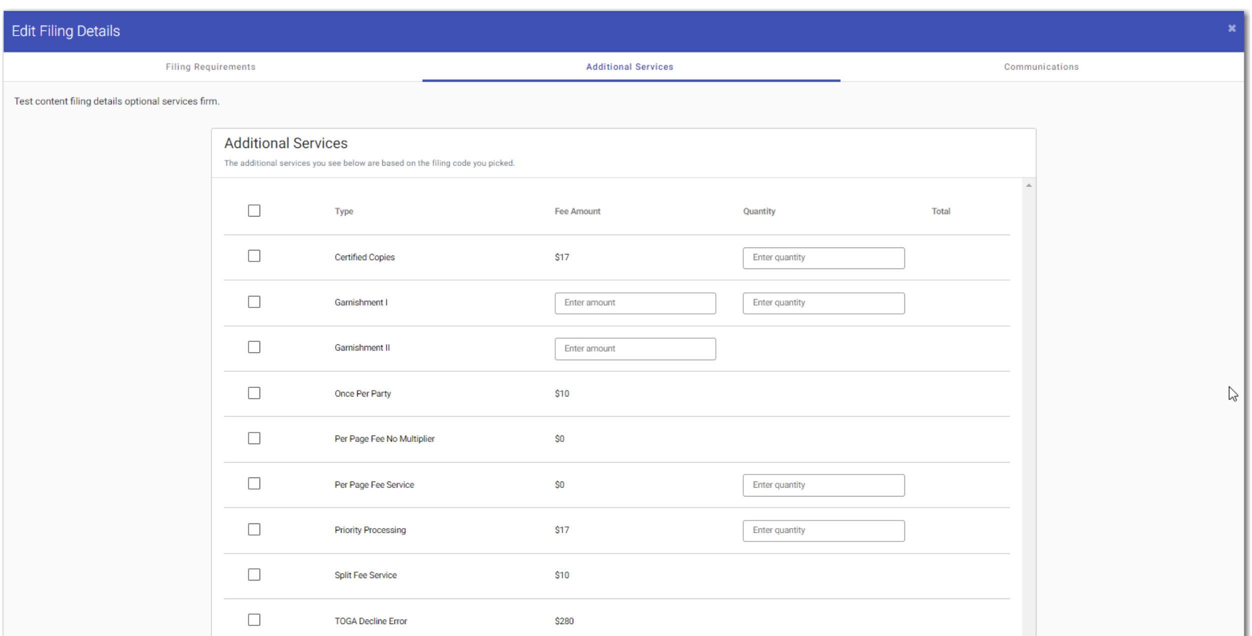



**Figure 10.7 – Additional Services Pane on the Edit Filing Details Page**

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.

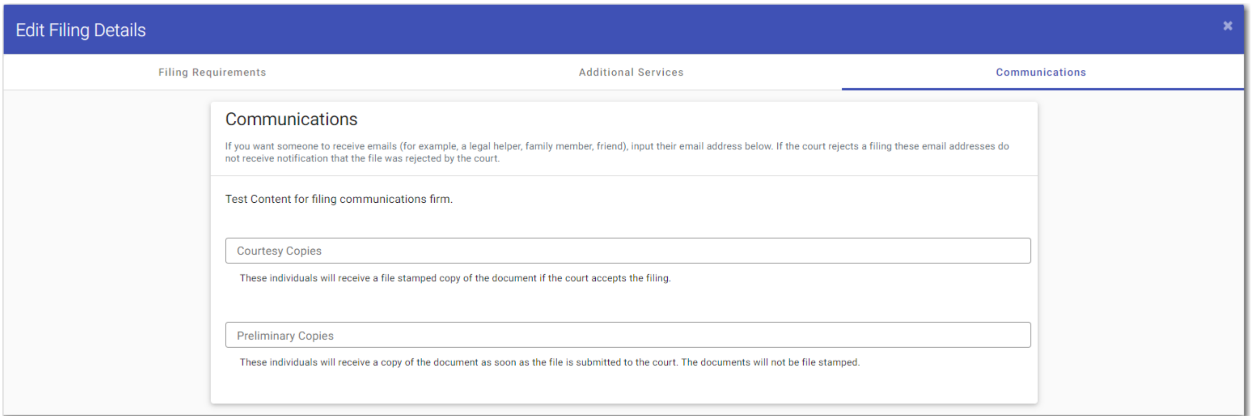



**Figure 10.8 – Communications Pane on the Edit Filing Details Page**

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

You can create a payment account before you begin your filing. You can also create a payment account during your filing from the *Fees* page.

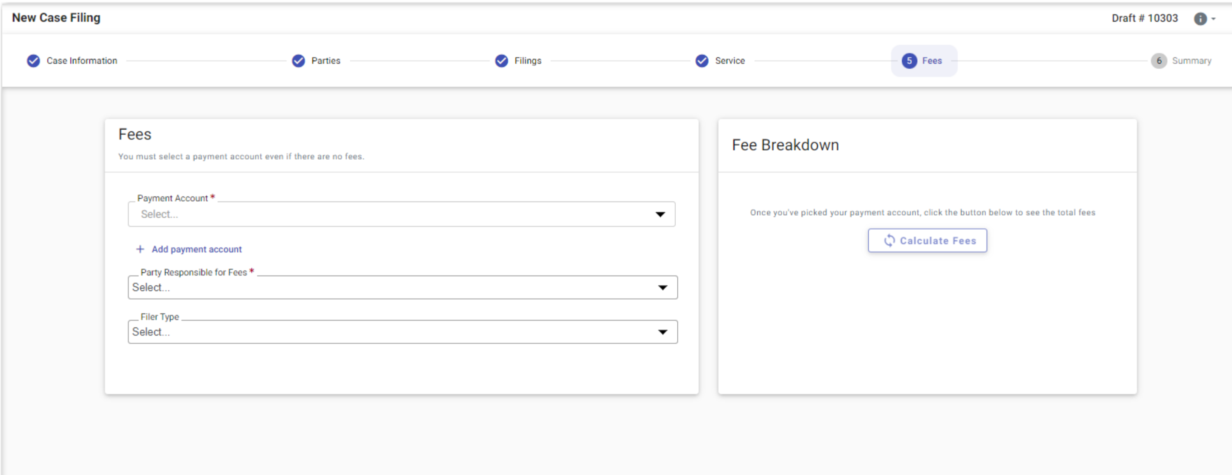
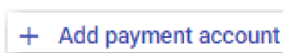



**Figure 10.9 – Example of a Fees Page**

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

To enter the payment information for your 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.

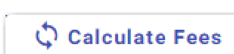
   Refer to the following topics for details on creating the various types of payment accounts:

   - Adding a Credit Card Payment Account, page 42
   - Adding an E-Check Payment Account, page 46
   - Adding a Draw-Down Account, page 50

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

4. In the Fee Breakdown pane, click 

.

   The fees for the filing are displayed.

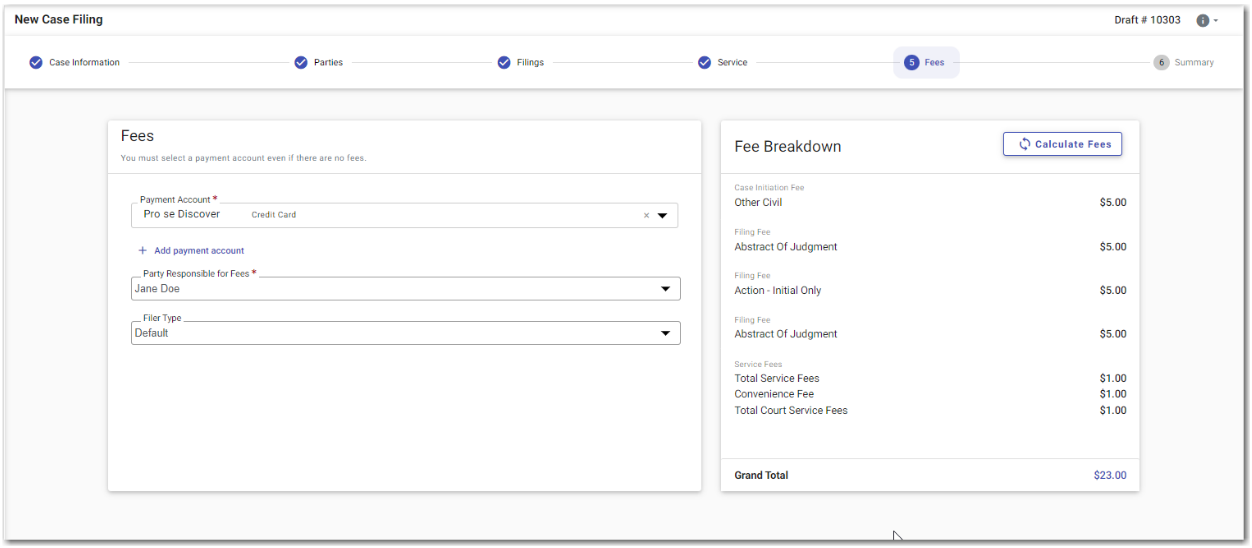



**Figure 10.10 – Example of a Fees Page with the Filing Fees Displayed**

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.**

5. 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.
2. After you have completed the fields in each section, from the *Fees* page, click 

.

   The *Summary* page is displayed.

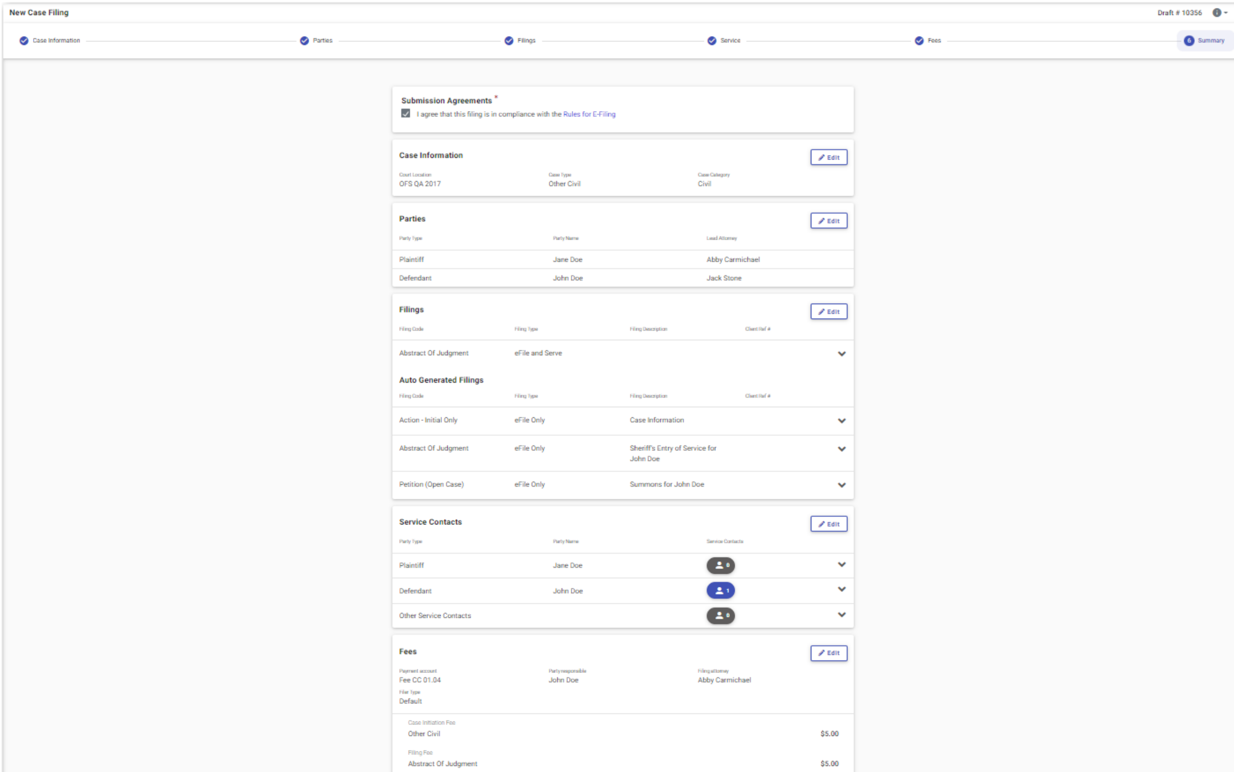



**Figure 10.11 – Example of a Summary Page**

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.

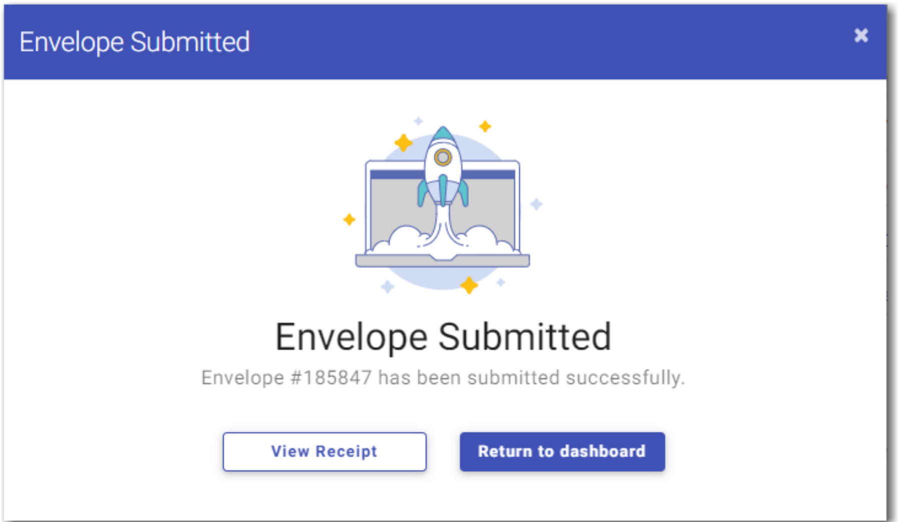



**Figure 10.12 – Envelope Submitted Window**

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: This feature is 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.

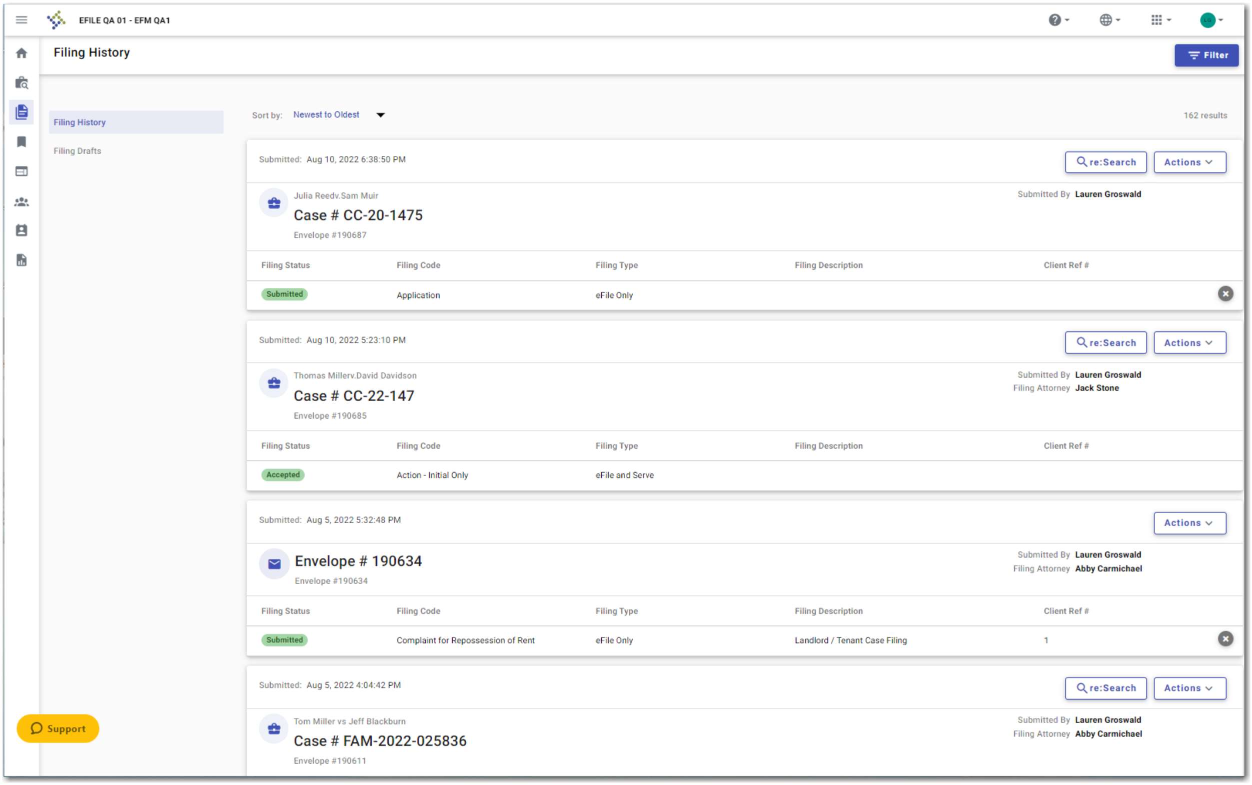
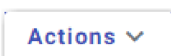



**Figure 10.13 – Example of a Filing History Page**

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.

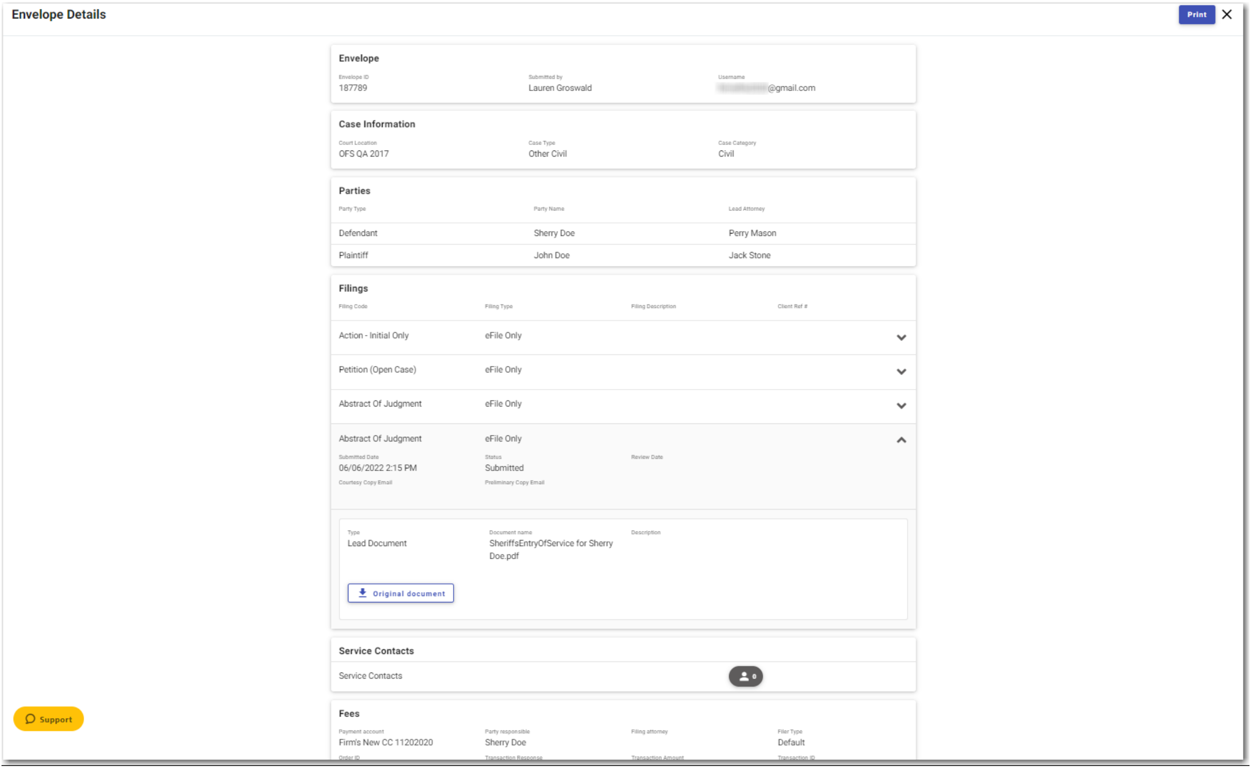



**Figure 10.14 – Example of an Envelope Details Page**

5. Click **Print** to print a copy of the envelope details.

# 11 Redaction Feature

**Topics covered in this chapter**



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.

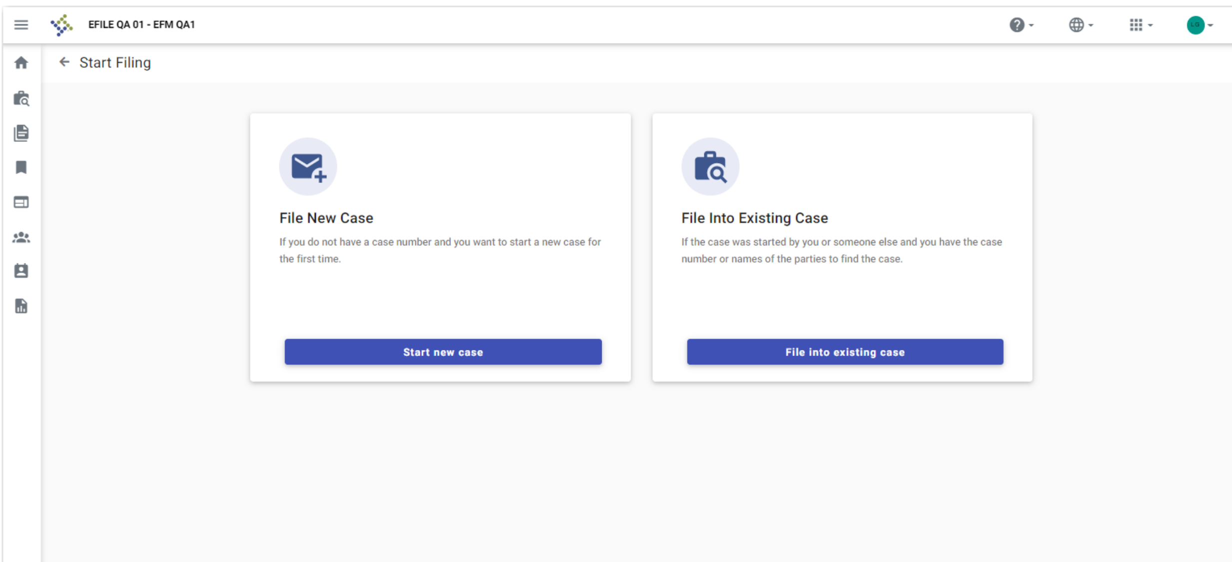



**Figure 11.1 – Start Filing Page**

2. Click 

.

   The *Case Information* page is displayed.

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

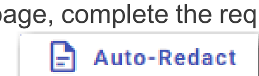
.

   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. Click 

.

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

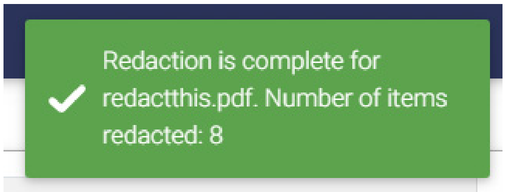



**Figure 11.2 – Example of a Message for a Completed Redaction**

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

   The *Service* page is displayed.

7. Complete the required fields on the *Service* page, and then click **Fees →**.

   The *Fees* page is displayed.

8. Complete the required fields on the *Fees* page, and then click **Summary →**.

   The *Summary* page is displayed.

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

   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 **Submit**.

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

# 12 File into an Existing Case

**Topics covered in this chapter**



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 **Start filing**. On the *Start Filing* page that is displayed, click **File into existing case**.
  - Click **Search cases**.

  When the *Search for Case* page is displayed, enter the search criteria for the case that you want to file into. Then, click **Search**.
- On the *Filing History* page, locate the case that you want to file into, and then click **Actions**. 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 **Start filing**. On the *Start Filing* page that is displayed, click **File into existing case**.
   - Click **Search cases**.

   The *Search for Case* page is displayed.

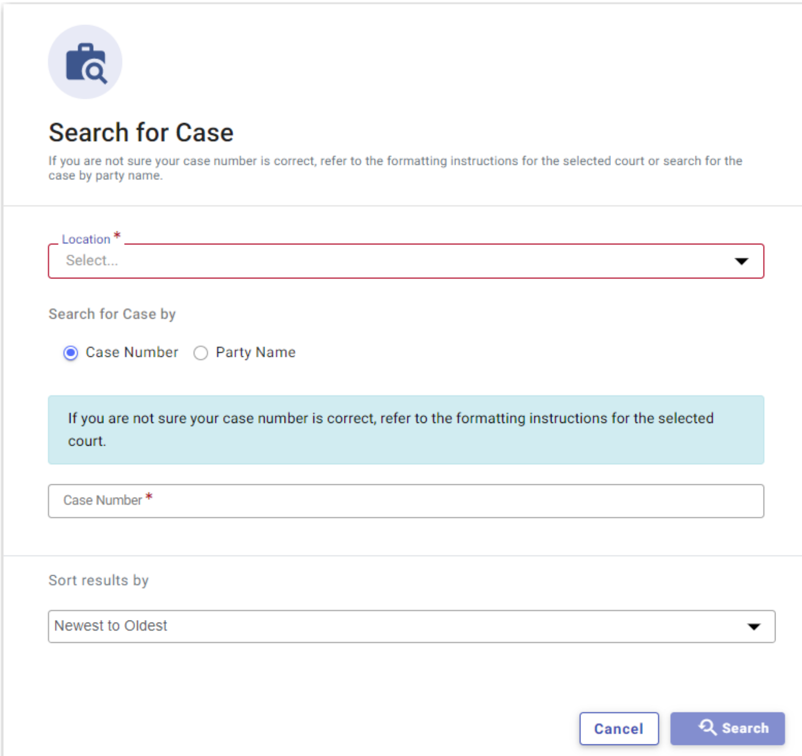



**Figure 12.1 – Example of a Search for Case Page**

**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.

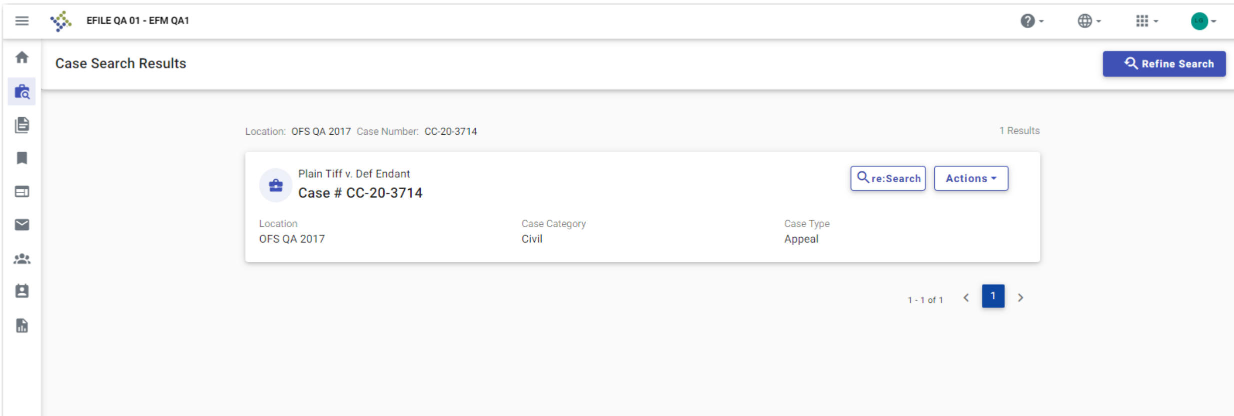



**Figure 12.2 – Example of a Case Search Results Page**

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.

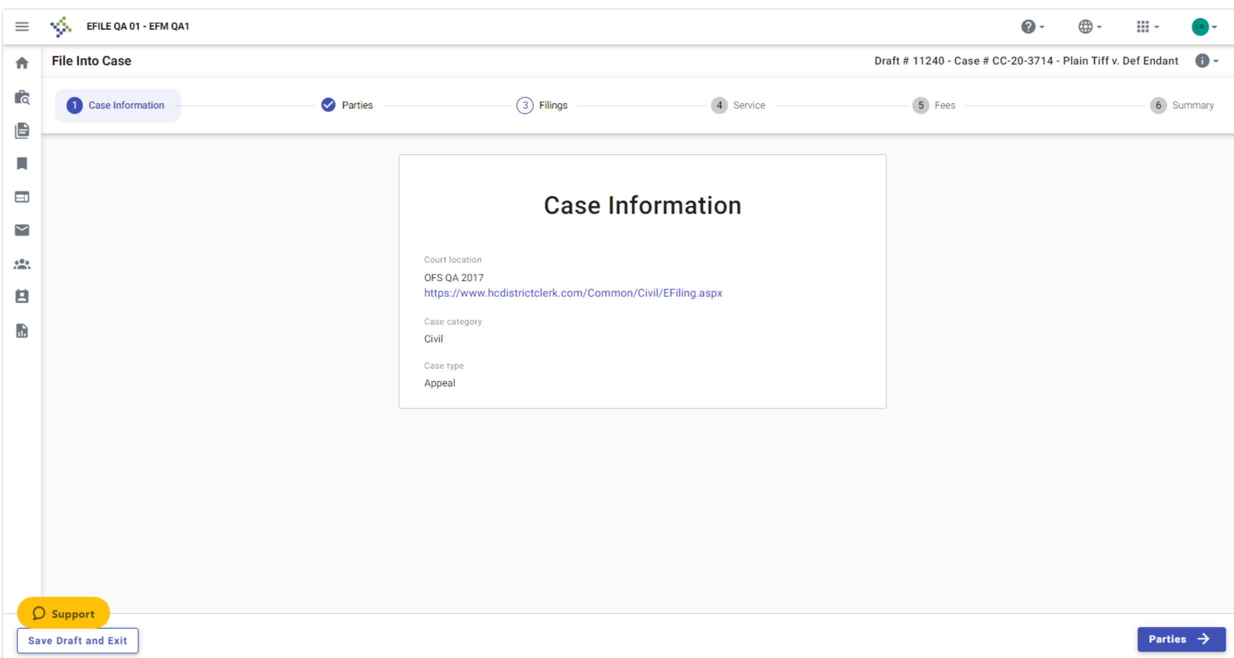



**Figure 12.3 – Example of a File Into Case Page with Case Information Displayed**

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, + Add More is displayed on the *Parties* page.**

6. Click Filings →.

   The *Filings* page is displayed.

7. On the *Filings* page, click + Add filing.

   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 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."**

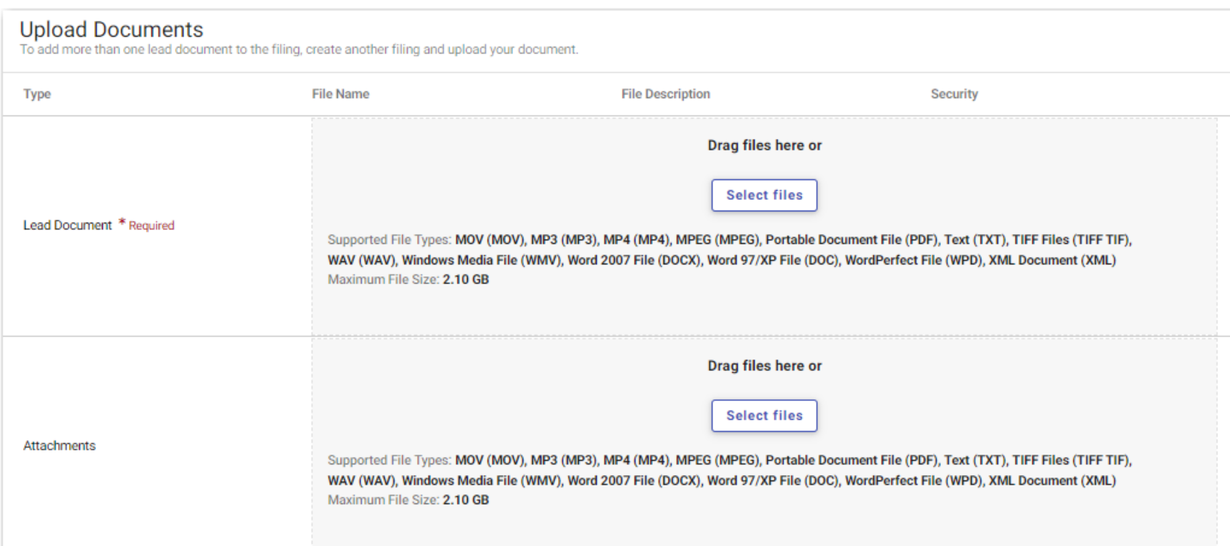



**Figure 12.4 – Upload Documents Pane**

16. If you have attachments to add to the filing, click Select files 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 Go to Communication, 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 Save.
23. After you have added all of the filings, click Service →.
24. On the *Service* page, add service contacts if applicable. Then, click Fees →.
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 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 Calculate Fees if you want to view the fee total.
29. Click Summary →.
30. Review the summary. If applicable, select the **Submission Agreements** check box.
31. When you are satisfied with your filing, click Submit.

# 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 Actions ⌄.

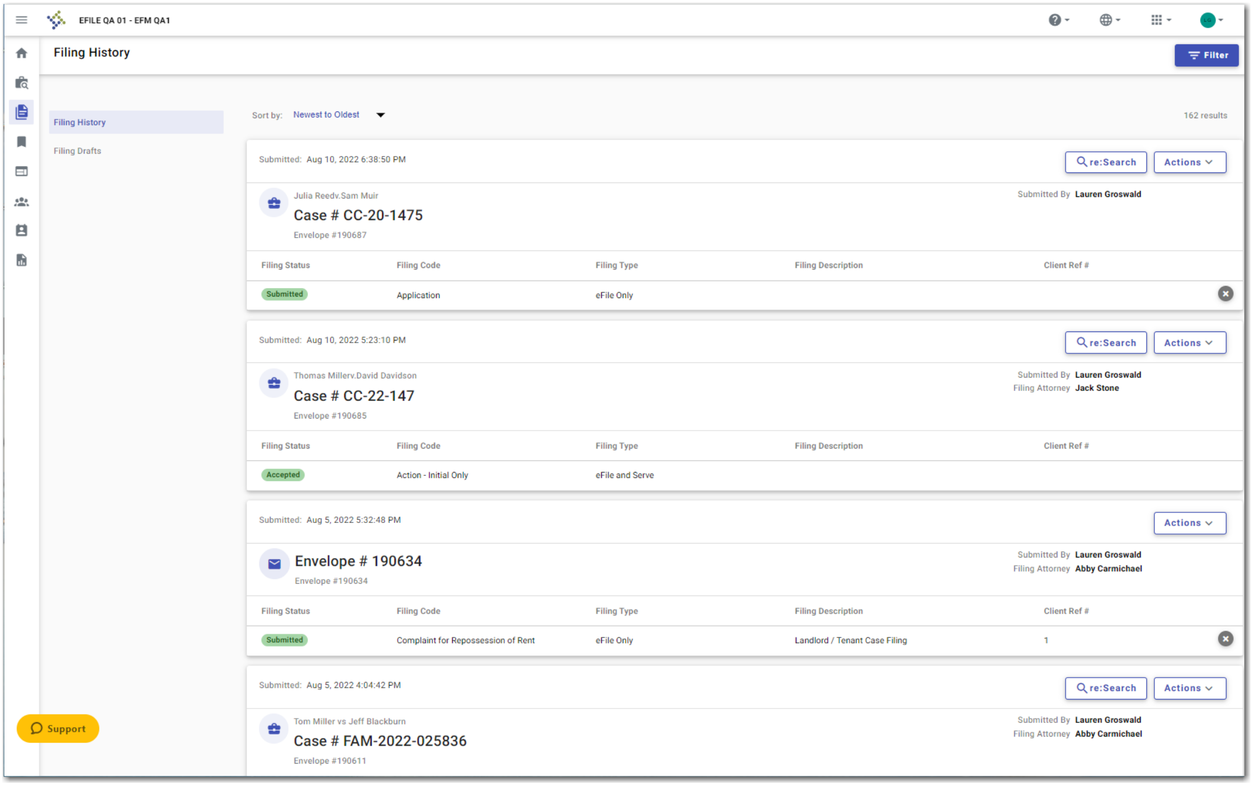



**Figure 12.5 – Example of a Filing History Page**

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

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

3. Click 

.

   The *Parties* page is displayed.

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

5. Click 

to continue with your filing.

   The *Filings* page is displayed.

6. On the *Filings* page, click 

.

   The *Edit Filing Details* page is displayed.

7. In the Filing Type pane, select the filing type option.
8. Select the filing type from the **Filing Type** drop-down list.
9. In the Filing Information pane, select the filing code from the **Filing Code** drop-down list.
10. Type a client reference number in the **Client Reference Number** field.
11. Type a description in the **Filing Description** field.
12. 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 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."**

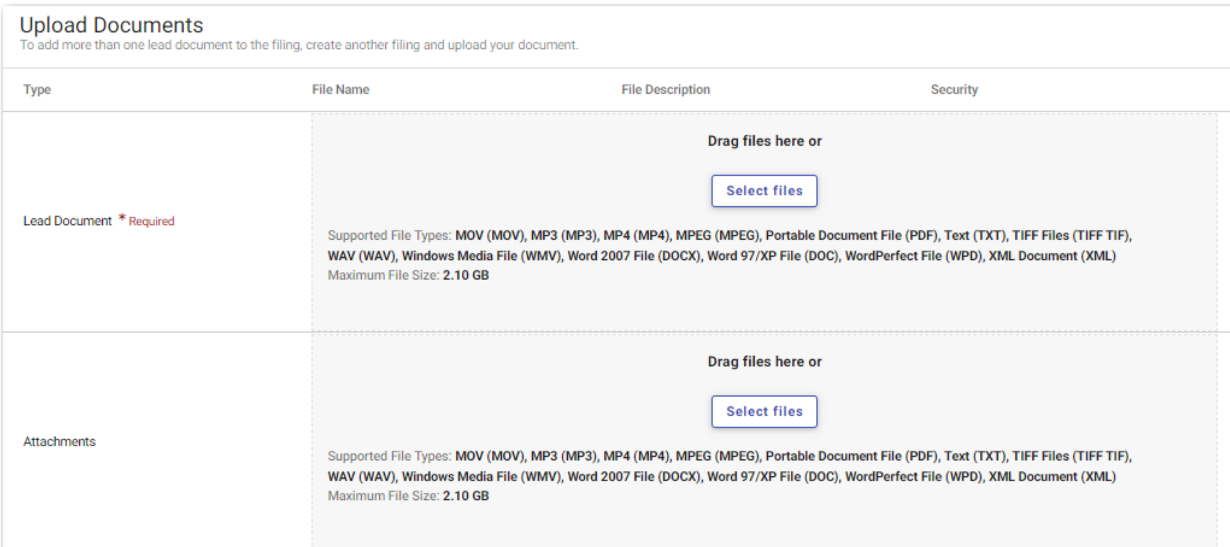



**Figure 12.6 – Upload Documents Pane**

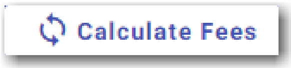
15. If you have attachments to add to the filing, click Select files in the **Attachments** section. Then, upload the specified attachments.
16. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
17. To add additional services, click **Additional 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 Go to Communication, 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 Save.
22. After you have added all of the filings, click Service →.
23. On the *Service* page, add service contacts, if applicable. Then, click Fees →.

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

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

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

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

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

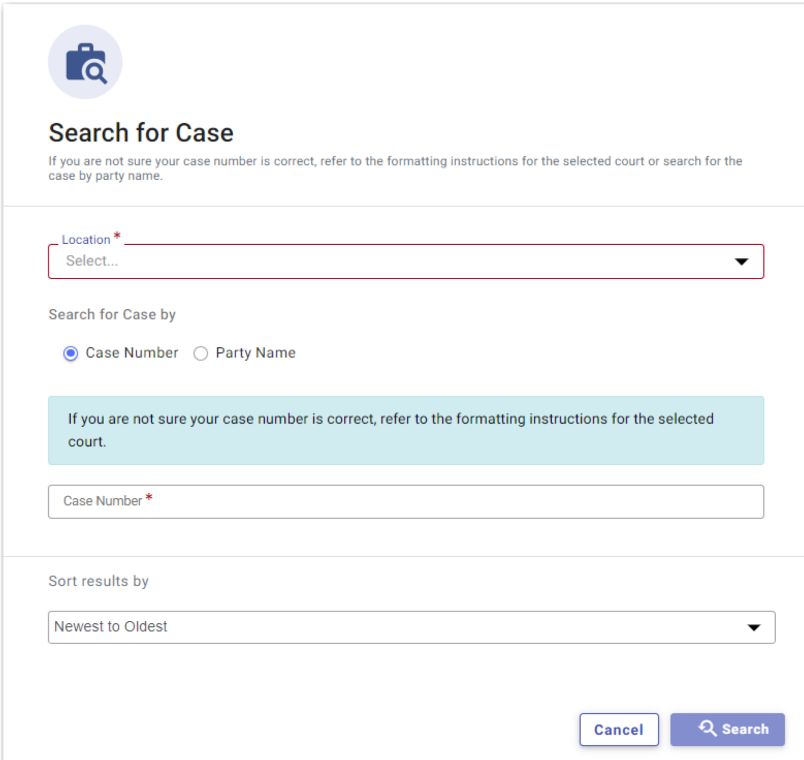



**Figure 12.7 – Example of a Search for Case Page**

**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.

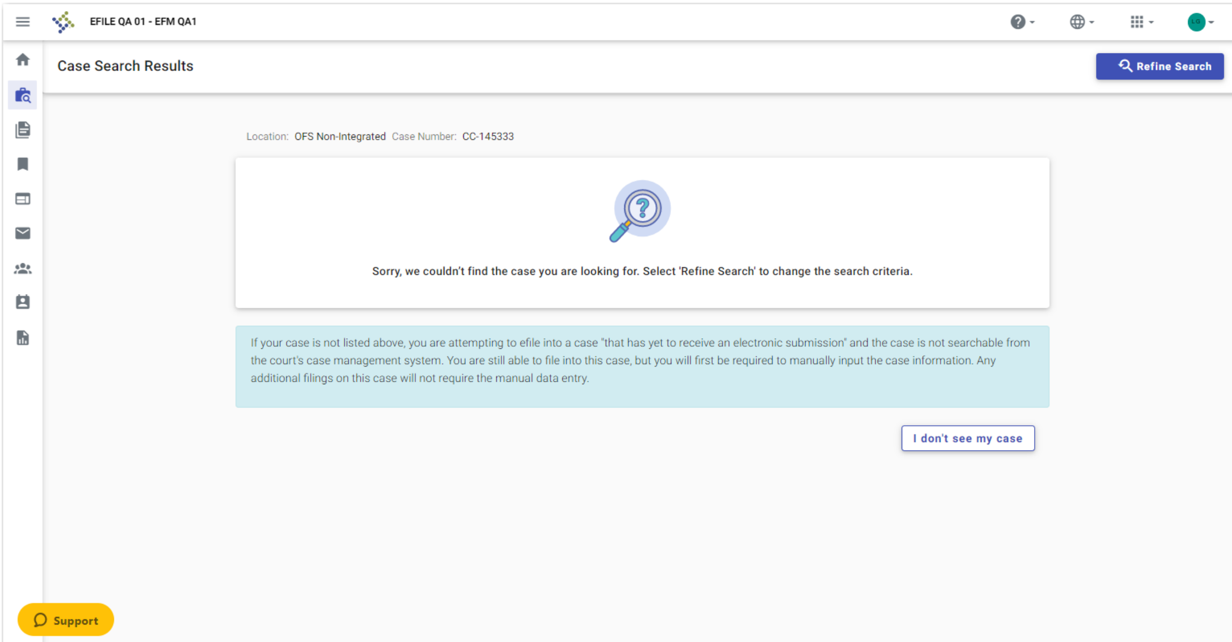



**Figure 12.8 – Example of a Case Search Window with No Results Found**

5. To continue, click **I don't see my case**.

   The *I Don't See My Case* window is displayed.

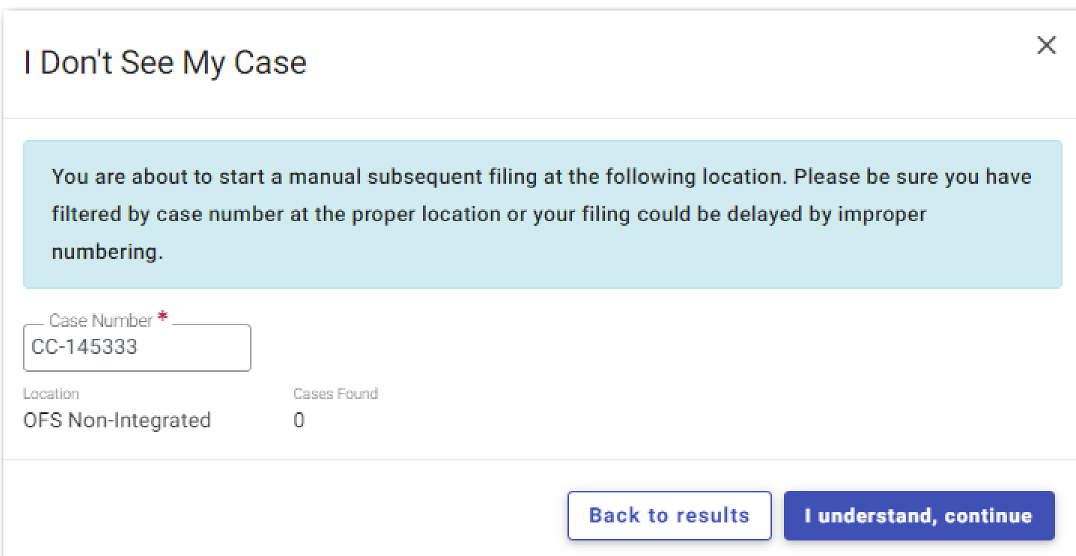



**Figure 12.9 – Example of an I Don't See My Case Window**

6. Click **I understand, continue** to continue filing into the case.

   The *Case Information* page is displayed. The location and case number are populated on the page.

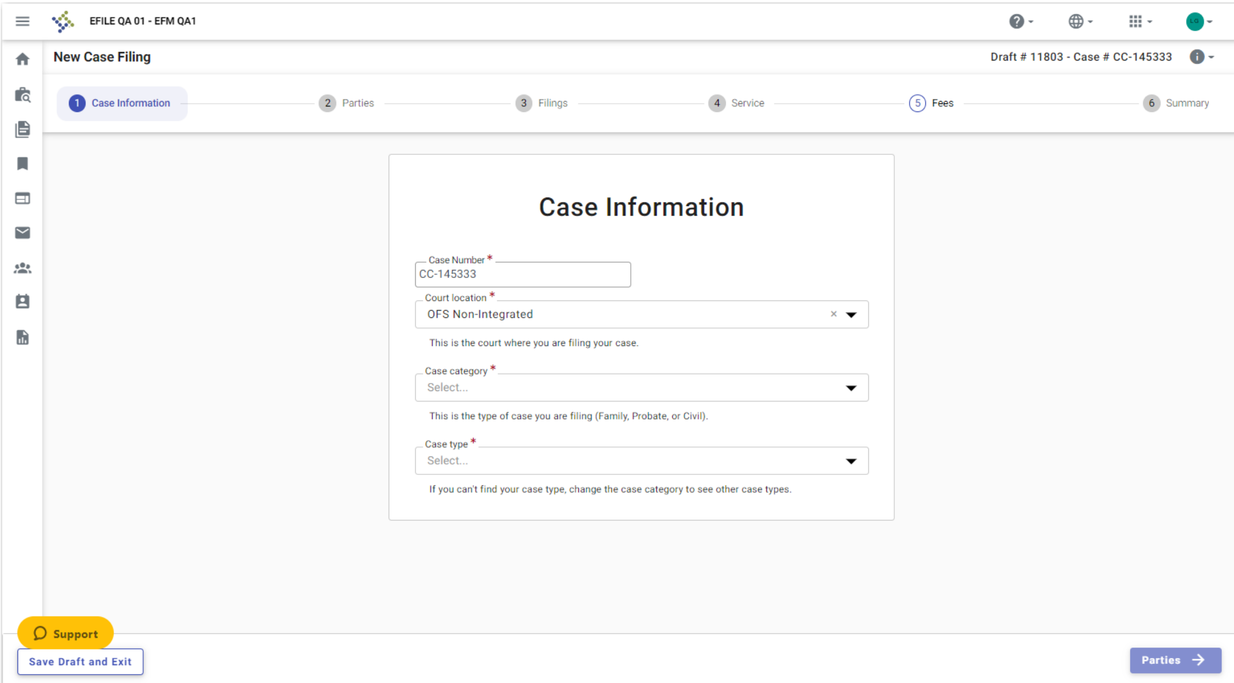



**Figure 12.10 – Example of a Case Information Page**

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.

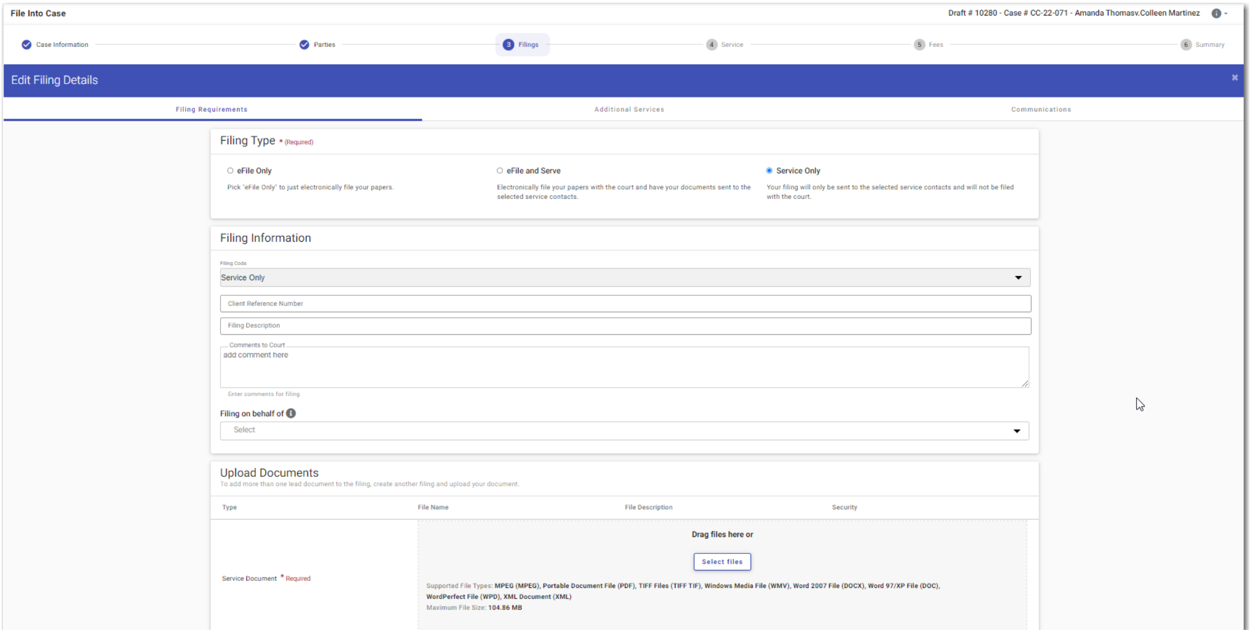


Figure 12.11 – Example of the Edit Filing Details Page—Service Only Filing

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."**

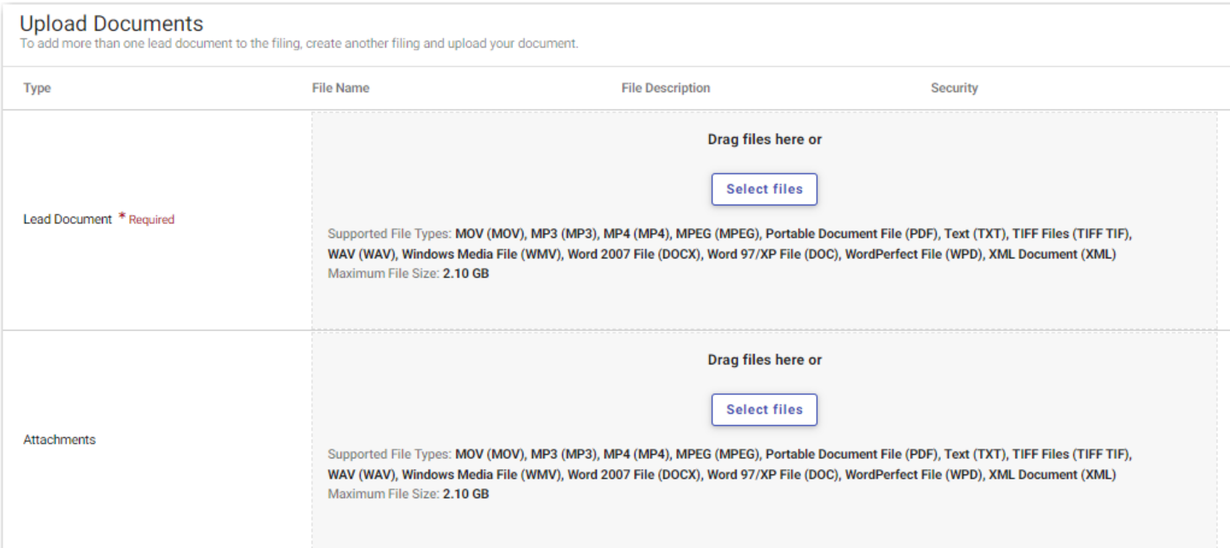



**Figure 12.12 – Upload Documents Pane**

7. If you have attachments to add to the filing, click Select files in the **Attachments** section. Then, upload the specified attachments.
8. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
9. Click Service → 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 Fees → to save your entries and to continue.
12. Complete the required fields on the *Fees* page, and then click Summary →.
13. Select the check boxes for the submission agreements, if applicable.
14. Review the information on the *Summary* page, and then click Submit.

# 13 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

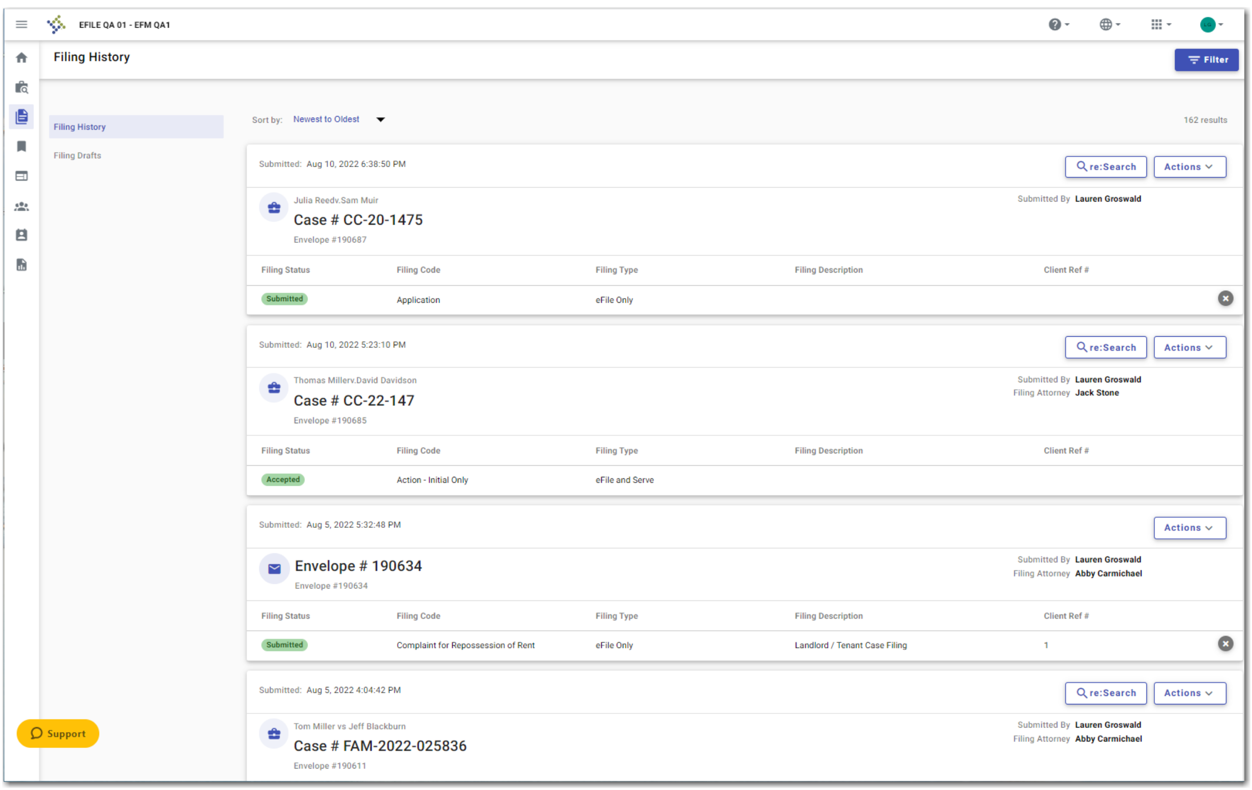



**Figure 13.1 – re:Search Button on the Filing History Page**

- *Filing Drafts* page

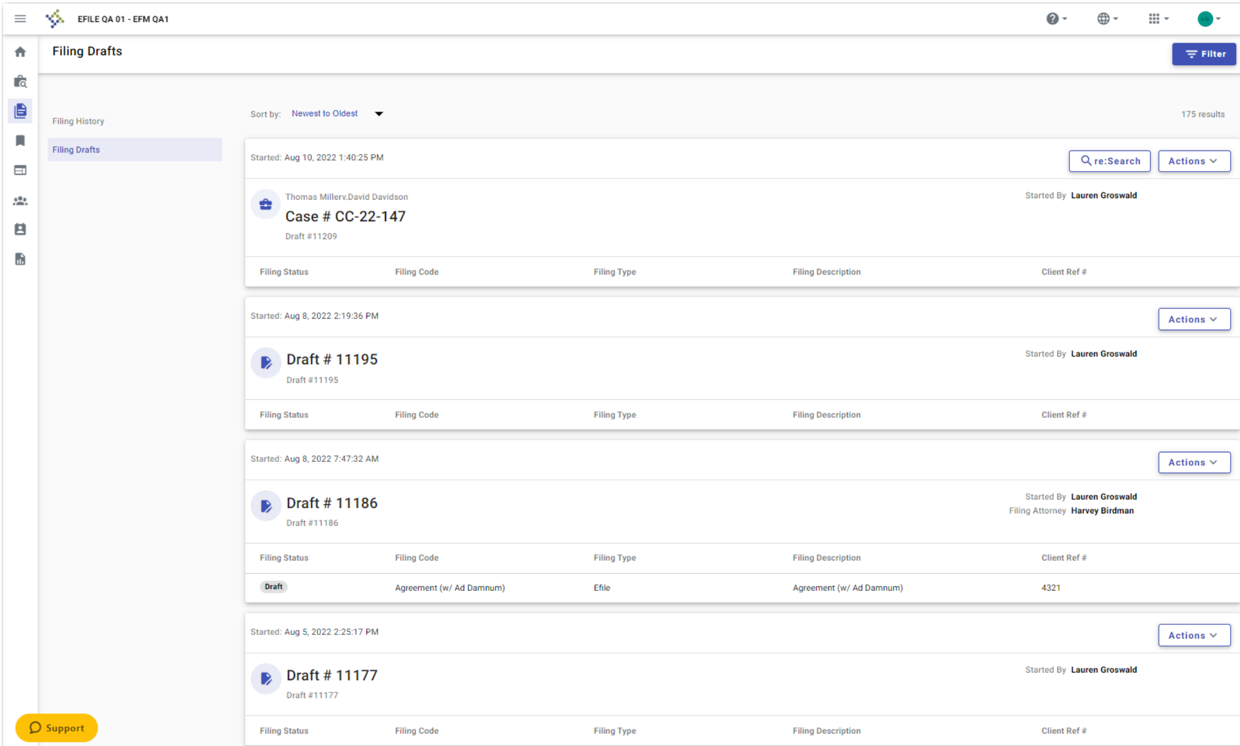



**Figure 13.2 – re:Search Button on the Filing Drafts Page**

- *Case Search Results* page

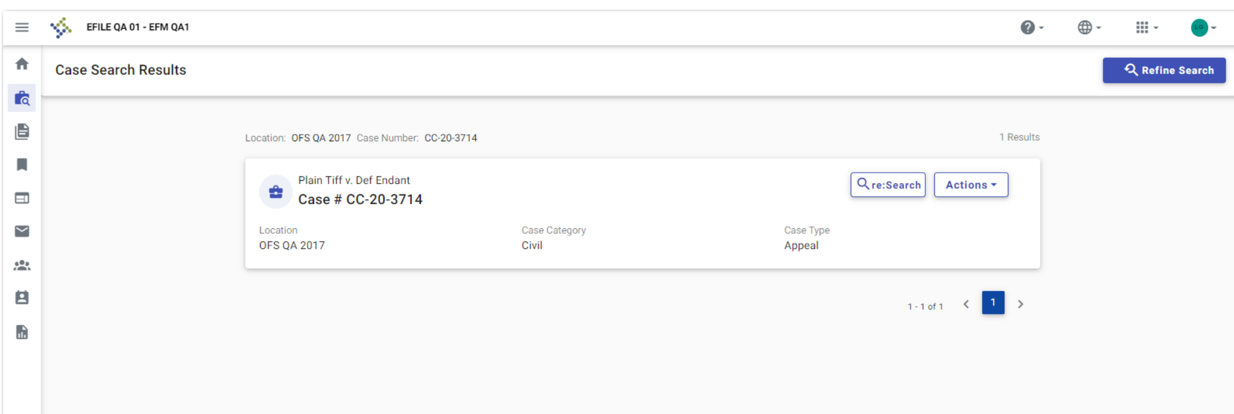



**Figure 13.3 – re:Search Button on the Case Search Results Page**

- *Bookmarks* page

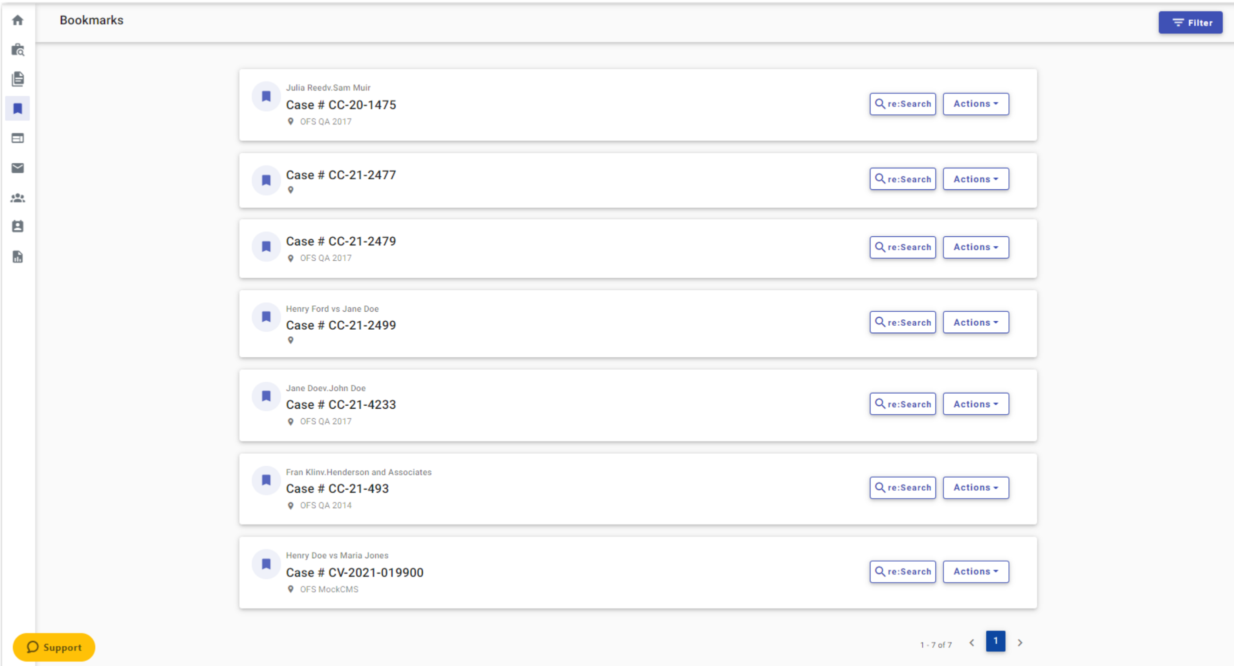



**Figure 13.4 – re:Search Button on the Bookmarks Page**

# 14 Service Contacts

**Topics covered in this chapter**



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

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

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

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)

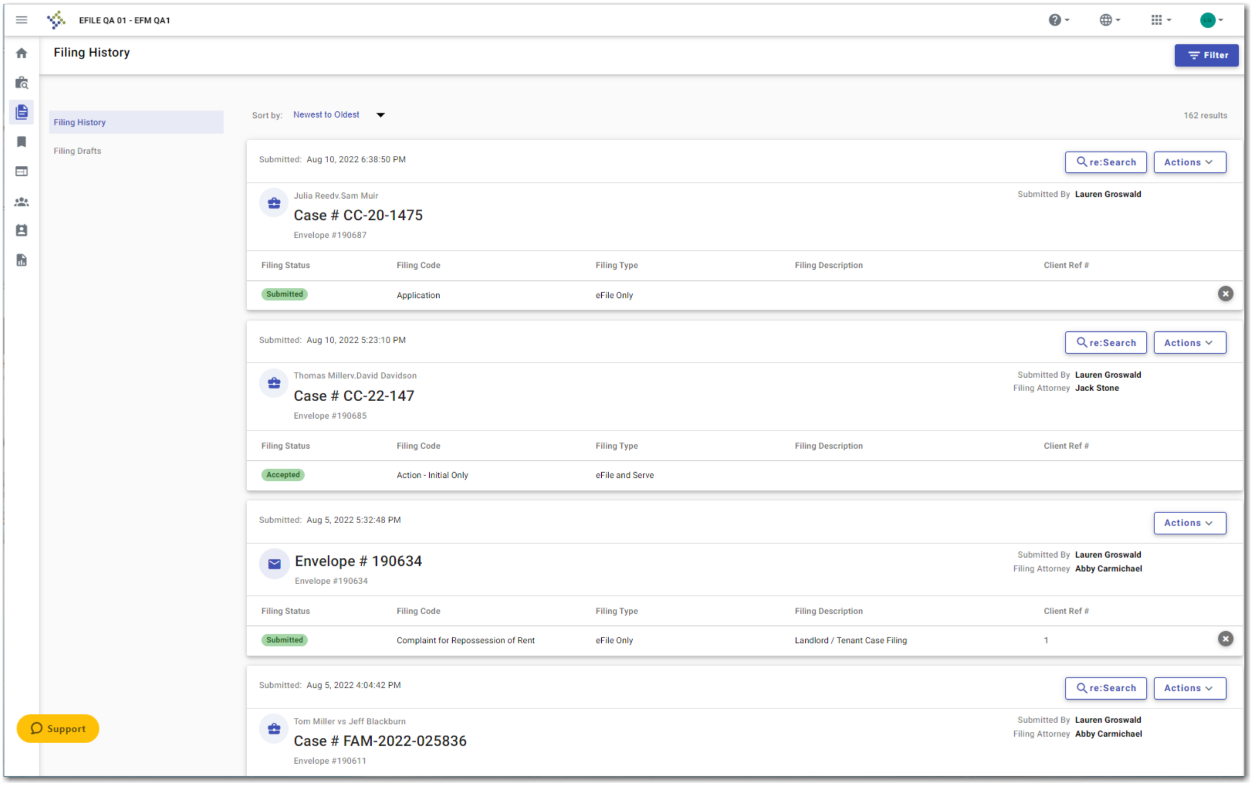



**Figure 14.1 – Example of a Filing History Page**

- *Case Search Results* page (click  to open the actions menu)



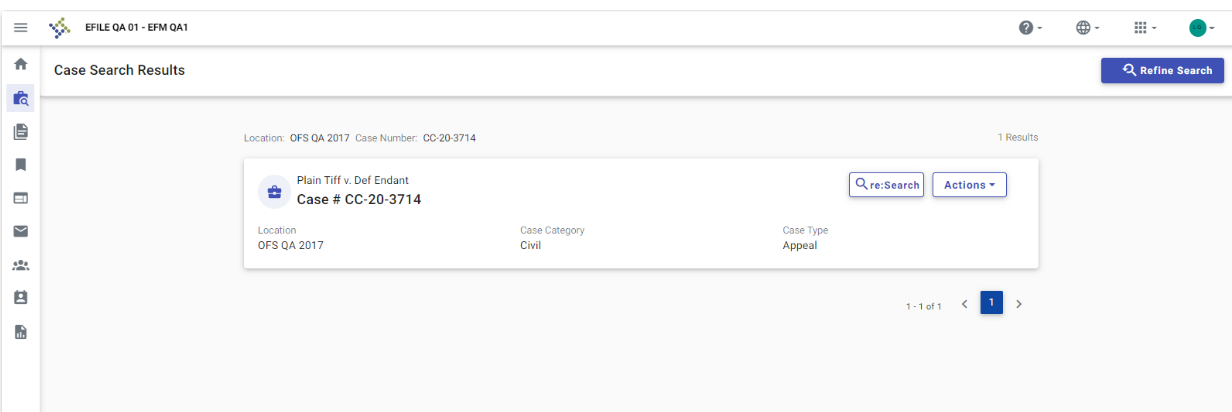



**Figure 14.2 – Example of a Case Search Results Page**

- *Bookmarks* page (click  to open the actions menu)

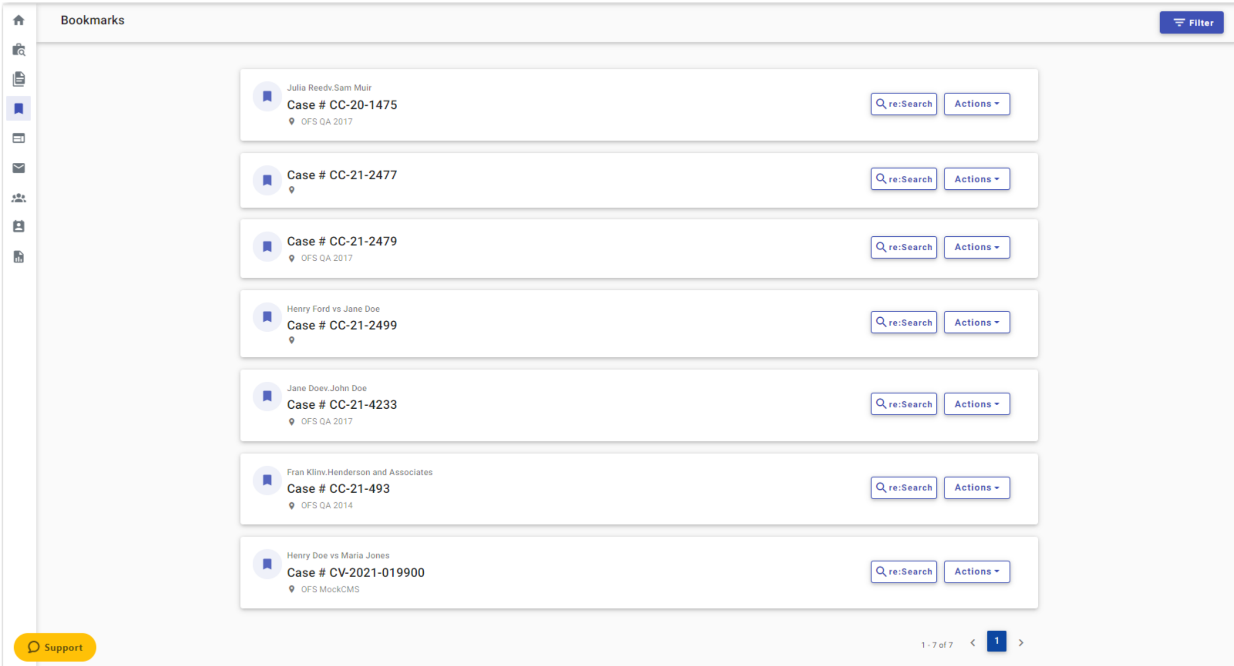



Figure 14.3 – Example of a Bookmarks Page

# Adding a New Service Contact

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

To add a new service contact to your contacts list:

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

   The *My Service Contacts* page is displayed.

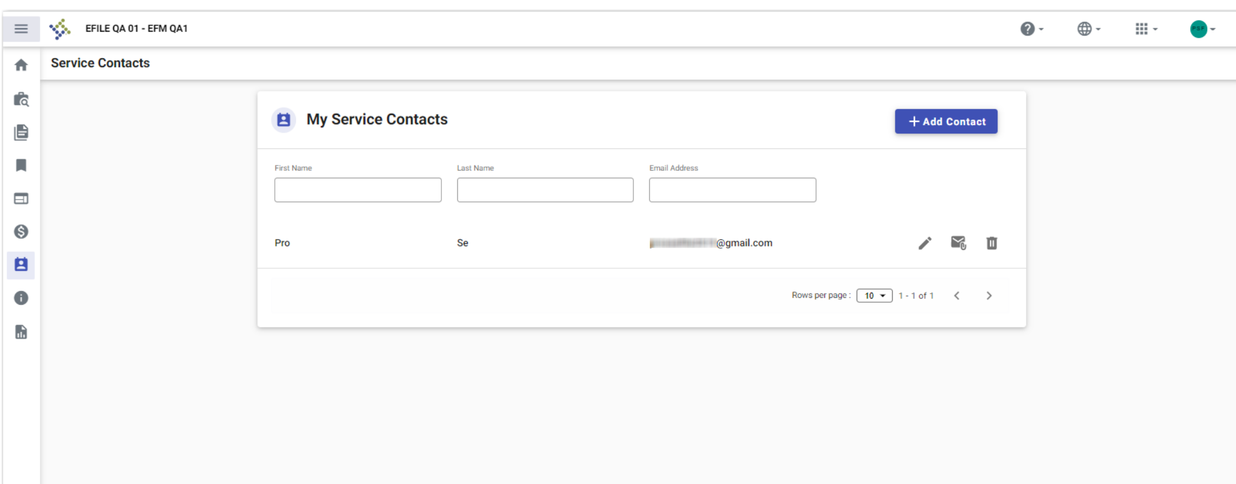



Figure 14.4 – Example of a My Service Contacts Page

2. Click 

.

The *Add Service Contact* window is displayed.

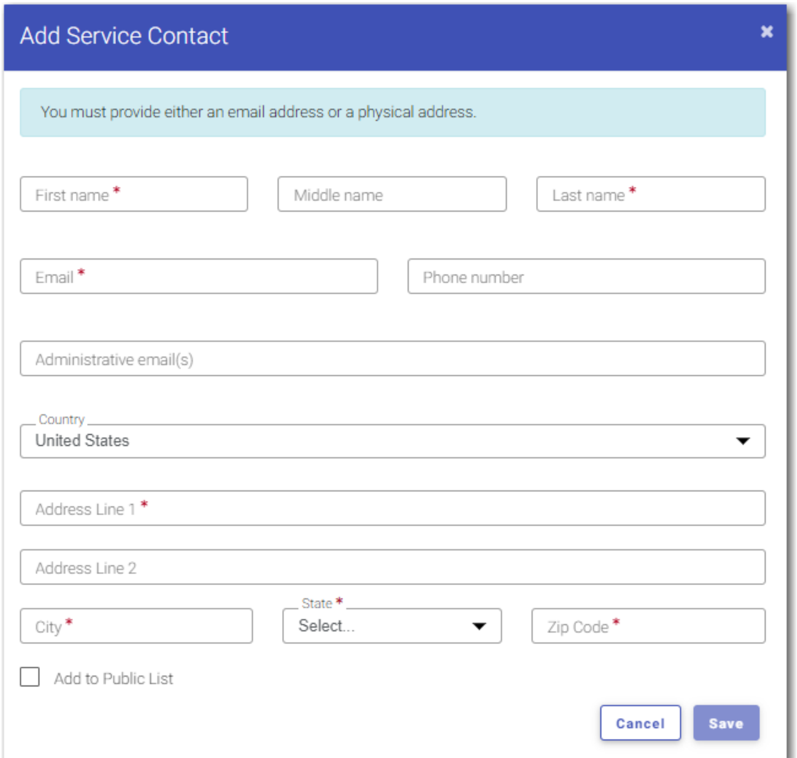



**Figure 14.5 – Add Service Contact Window**

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 *My 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.

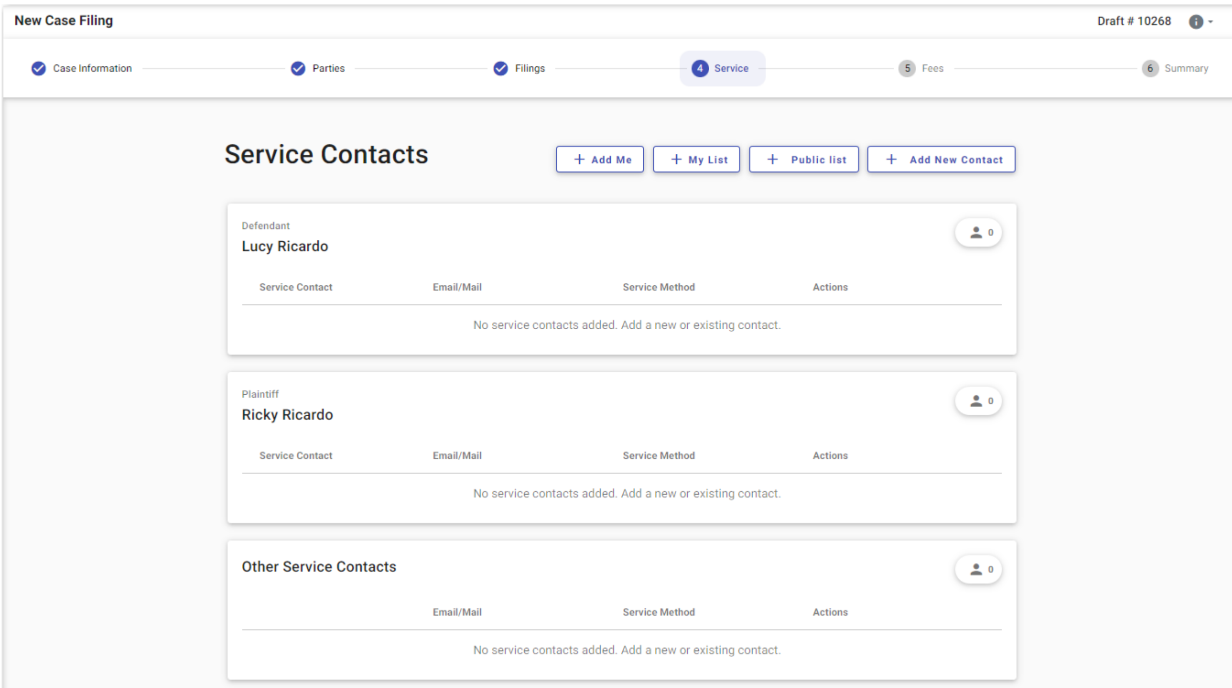



**Figure 14.6 – Example of a Service Page in a Case Filing**

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.

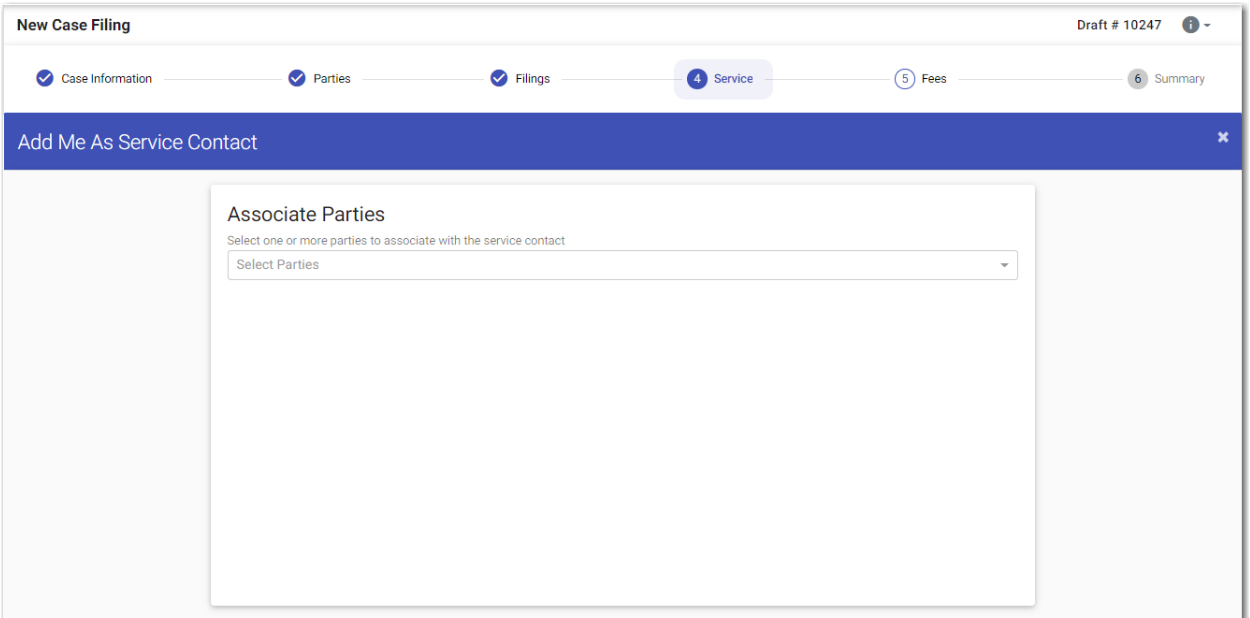



**Figure 14.7 – Example of an Add Me As Service Contact Page**

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 drop-down list in the *Associate Parties* drop-down list.**

3. Click 

.

# Adding a Service Contact from Your Service Contact List to a Filing

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

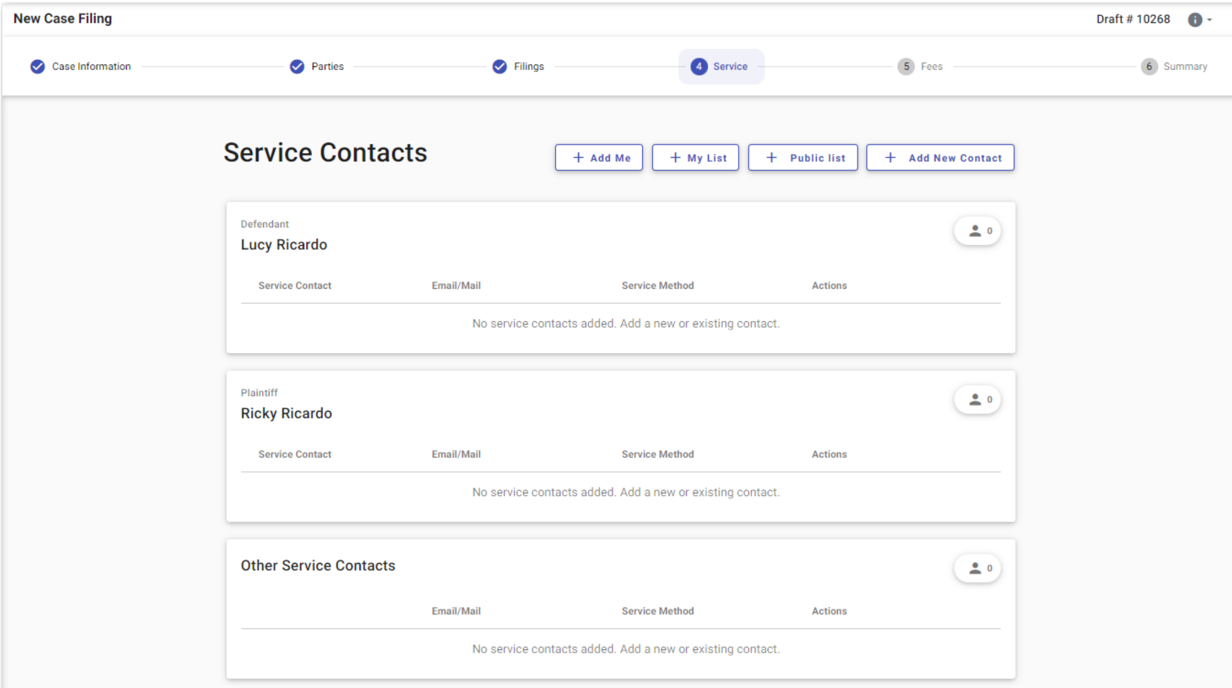
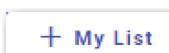



**Figure 14.8 – Example of a Service Page in a Case Filing**

To add a service contact from your contact list to a filing:

1. On the *Service* page, click 

.

   The *Add from My Service Contacts* page is displayed.

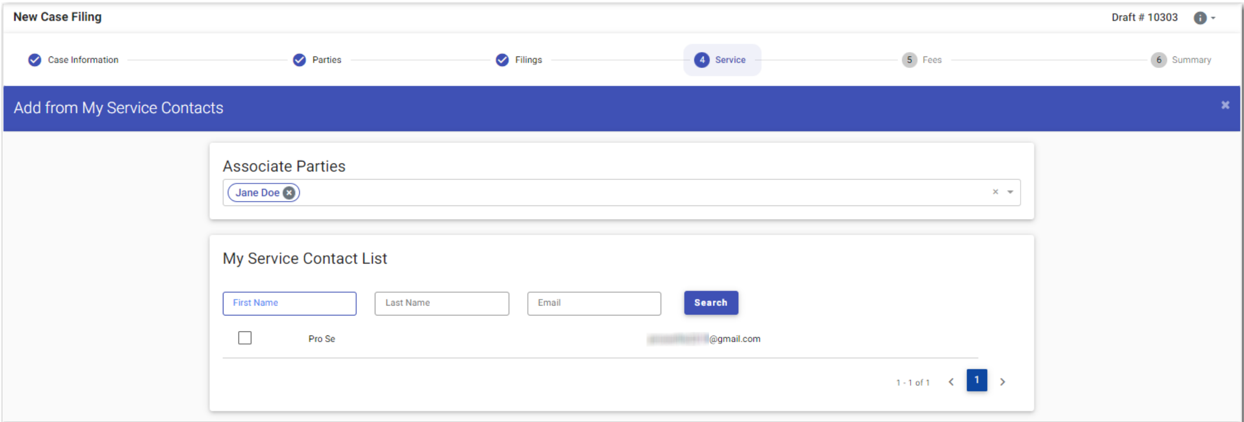



**Figure 14.9 – Example of an Add from My Service Contacts Page**

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 My 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.

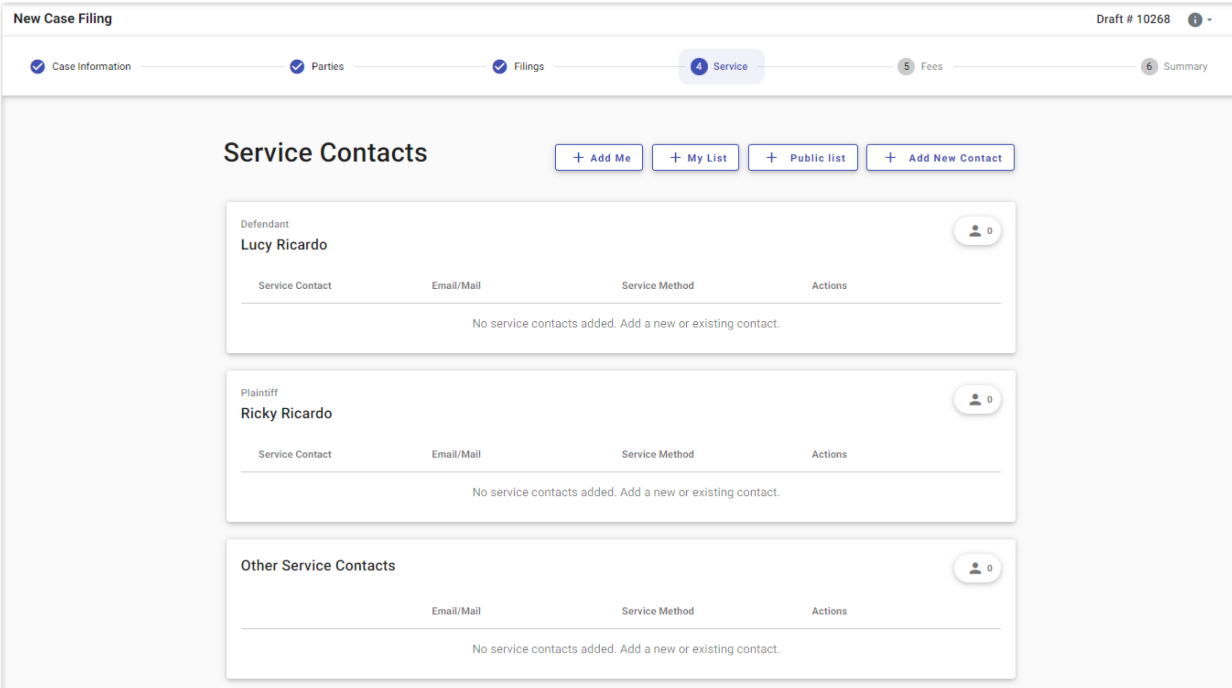



**Figure 14.10 – Example of a Service Page in a Case Filing**

To add a service contact from the public list to a filing:

1. On the *Service* page, click 

.

   The *Add Existing Public Contact* page is displayed.

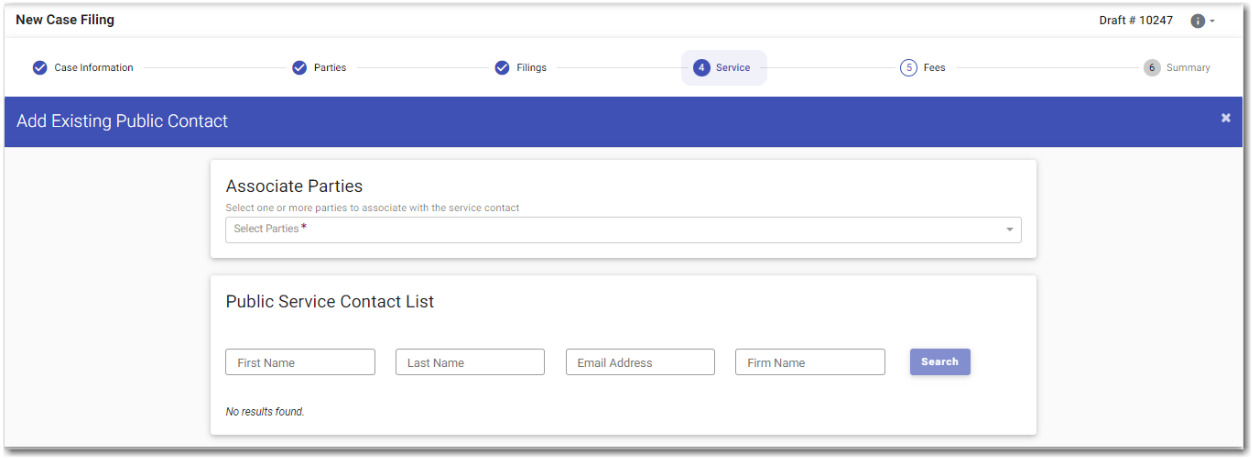



Figure 14.11 – Example of an Add Existing Public Contact Page

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 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.

4. Locate the contacts that you want to add to your filing.
5. Select the check box for each contact that you want to add.
6. Click 

.

# Adding a New Service Contact to a Filing

You can add a new service contact to a filing.

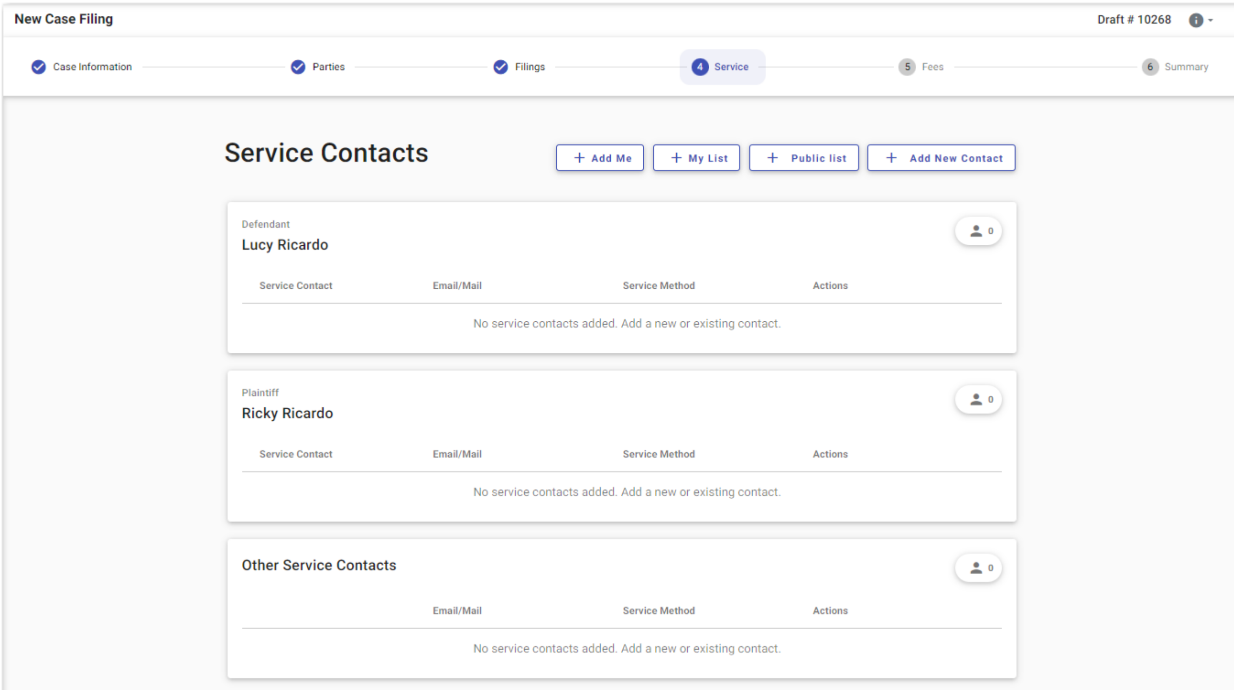



**Figure 14.12 – Example of a Service Page in a Case Filing**

To add a new service contact to a filing:

1. On the *Service* page, click 

.

   The *Add Service Contact* page is displayed.

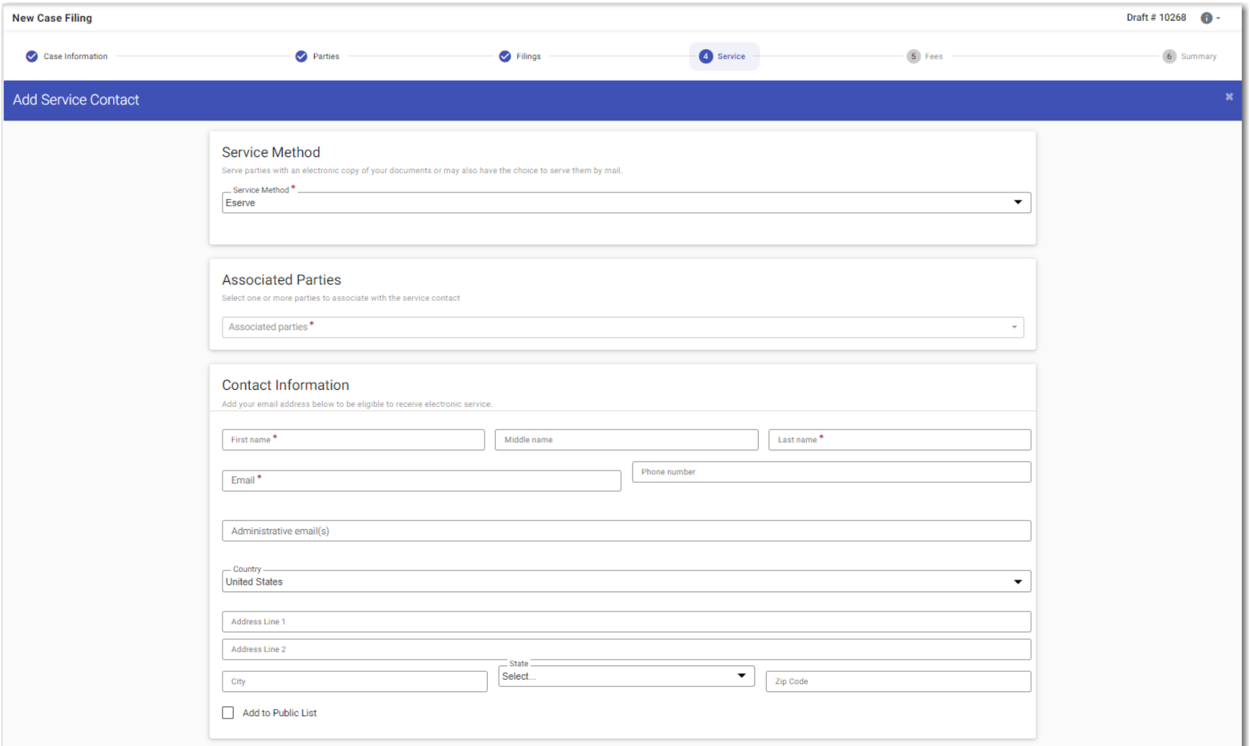



Figure 14.13 – Example of an Add Service Contact Page

2. 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.**

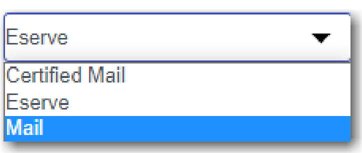



Figure 14.14 – Example of a Service Method Drop-Down List

3. 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.**

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

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

6. If applicable, type a phone number in the **Phone Number** field.
7. If applicable, type the administrative email address in the **Administrative email(s)** field.

8. 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**.
9. If a physical address is required for the service contact, type the address in the **Address Line 1** field.
10. If applicable, type an address in the **Address Line 2** field.
11. Type the name of the city in the **City** field.
12. Select the state from the **State** drop-down list.
13. Type the ZIP code in the **Zip Code** field.
14. 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.**
15. 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:

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

   The *My Service Contacts* page is displayed.

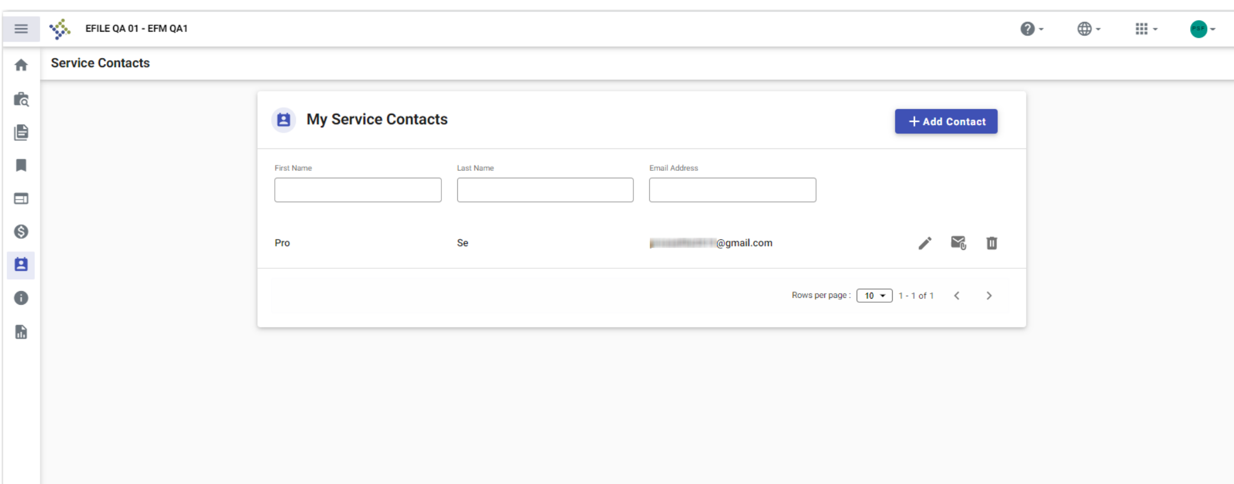
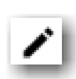



**Figure 14.15 – Example of a My Service Contacts Page**

2. 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.

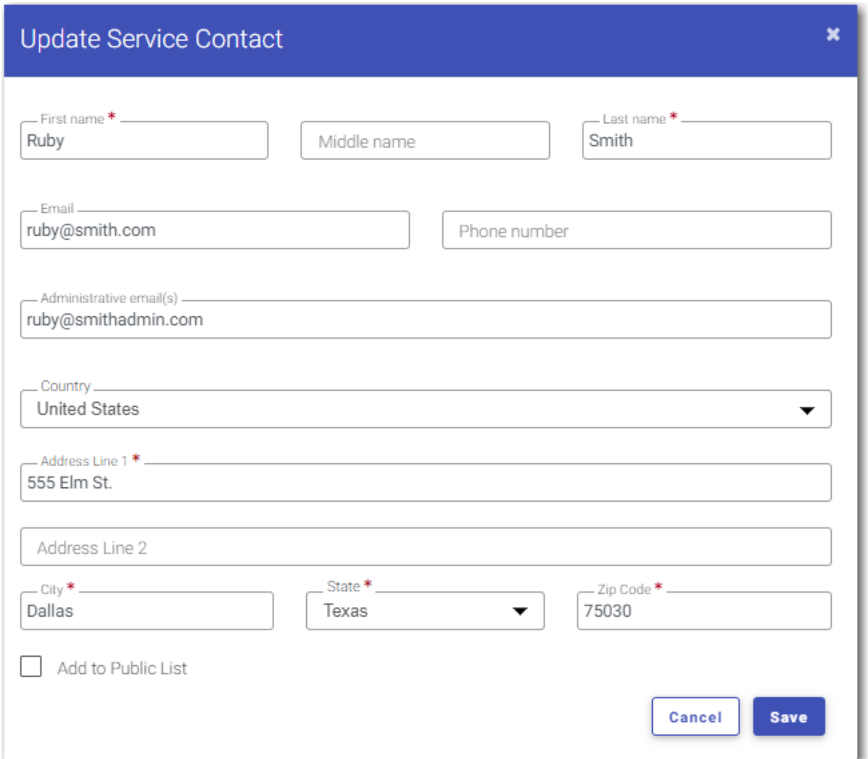



**Figure 14.16 – Example of an Update Service Contact Window**

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

.

# 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 **My Service Contacts**.

   The *My Service Contacts* page is displayed.

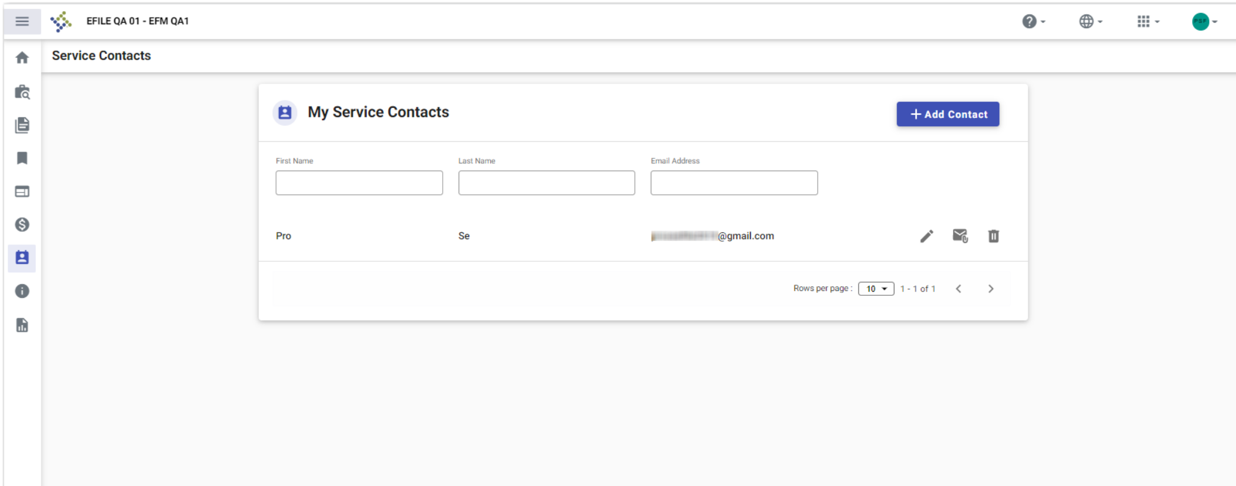



**Figure 14.17 – Example of a My Service Contacts Page**

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.

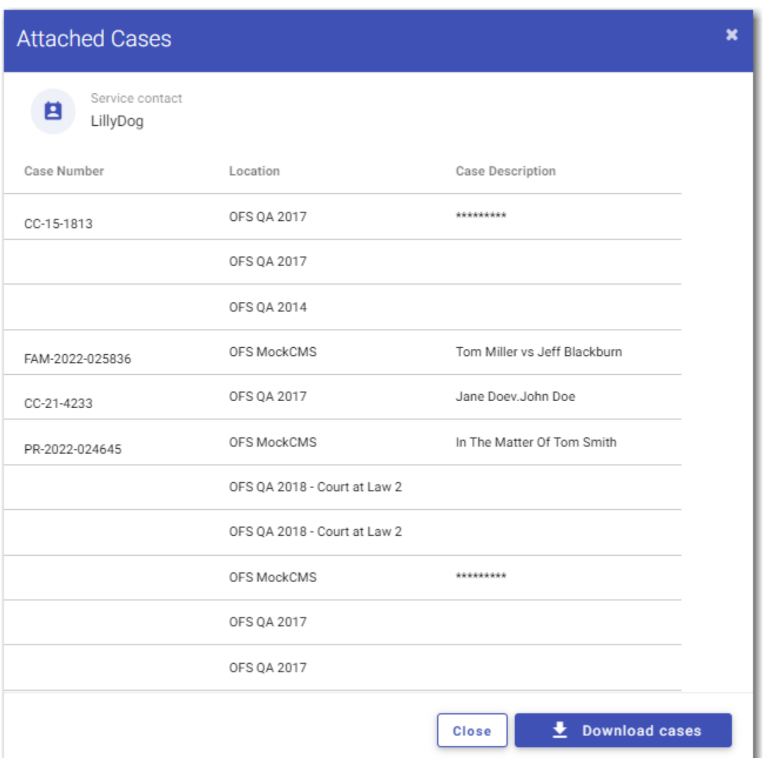



**Figure 14.18 – Example of an Attached Cases Window**

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.**

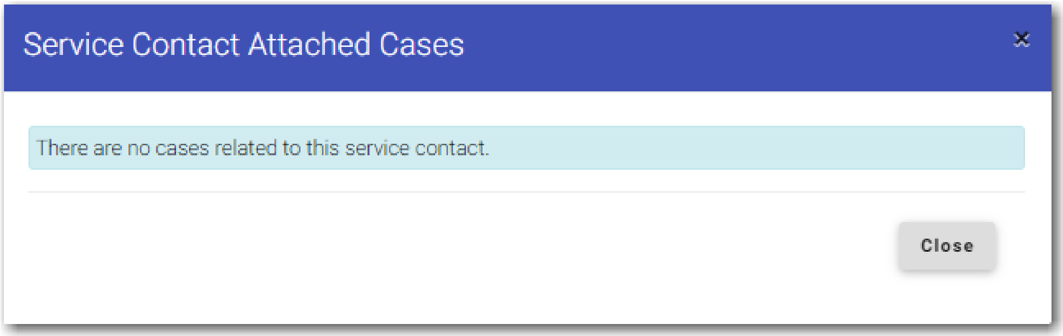



**Figure 14.19 – Service Contact Attached Cases Window—No Attached Cases**

# 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.

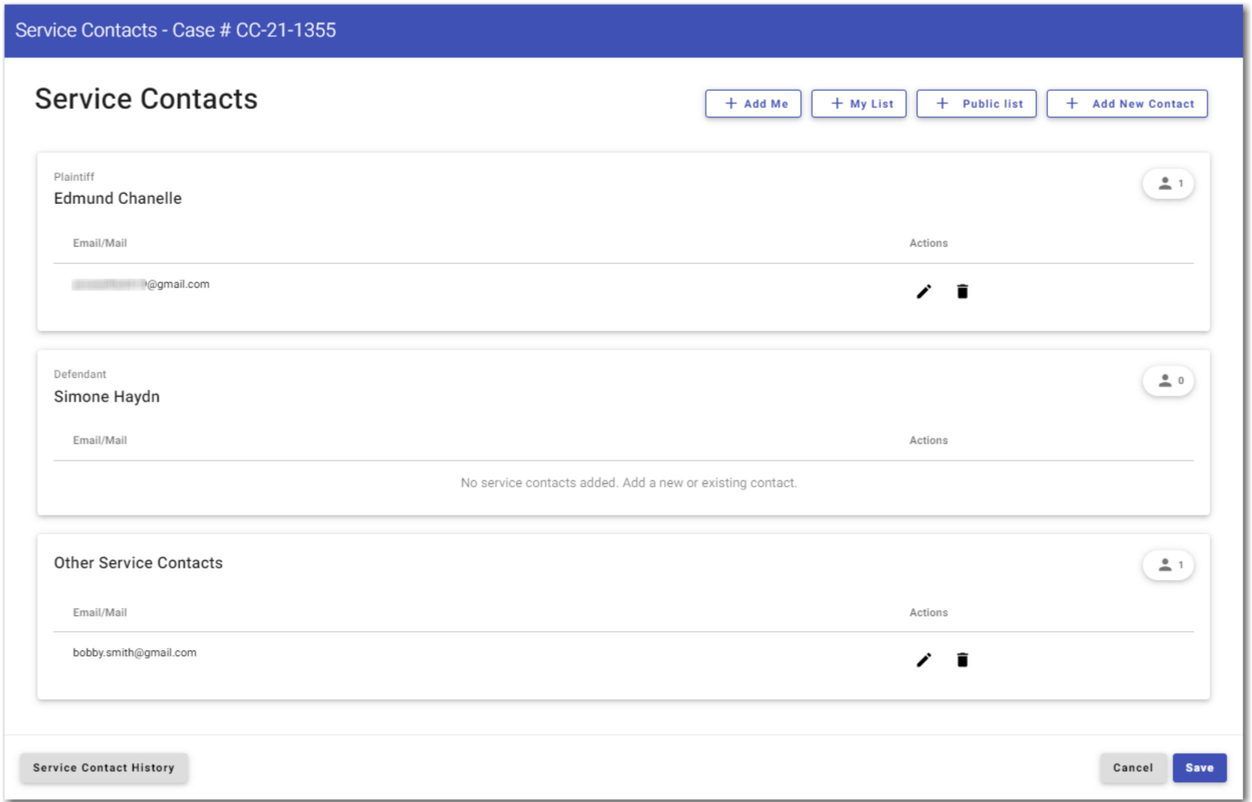



**Figure 14.20 – Example of a Case Service Contacts Window**

3. Click 

.

   The *Service Contact History* window is displayed.

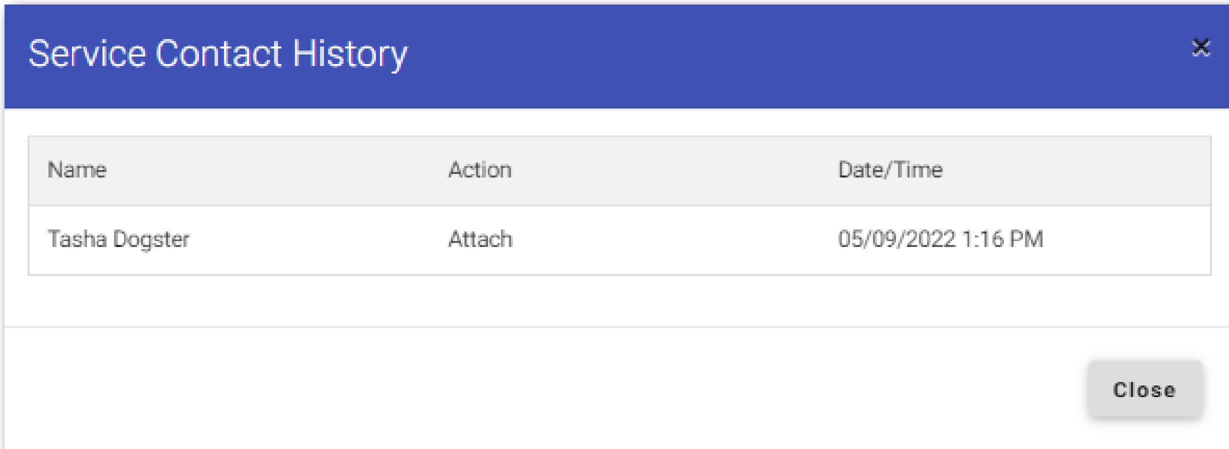



**Figure 14.21 – Example of a Service Contact History Window**

# 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.

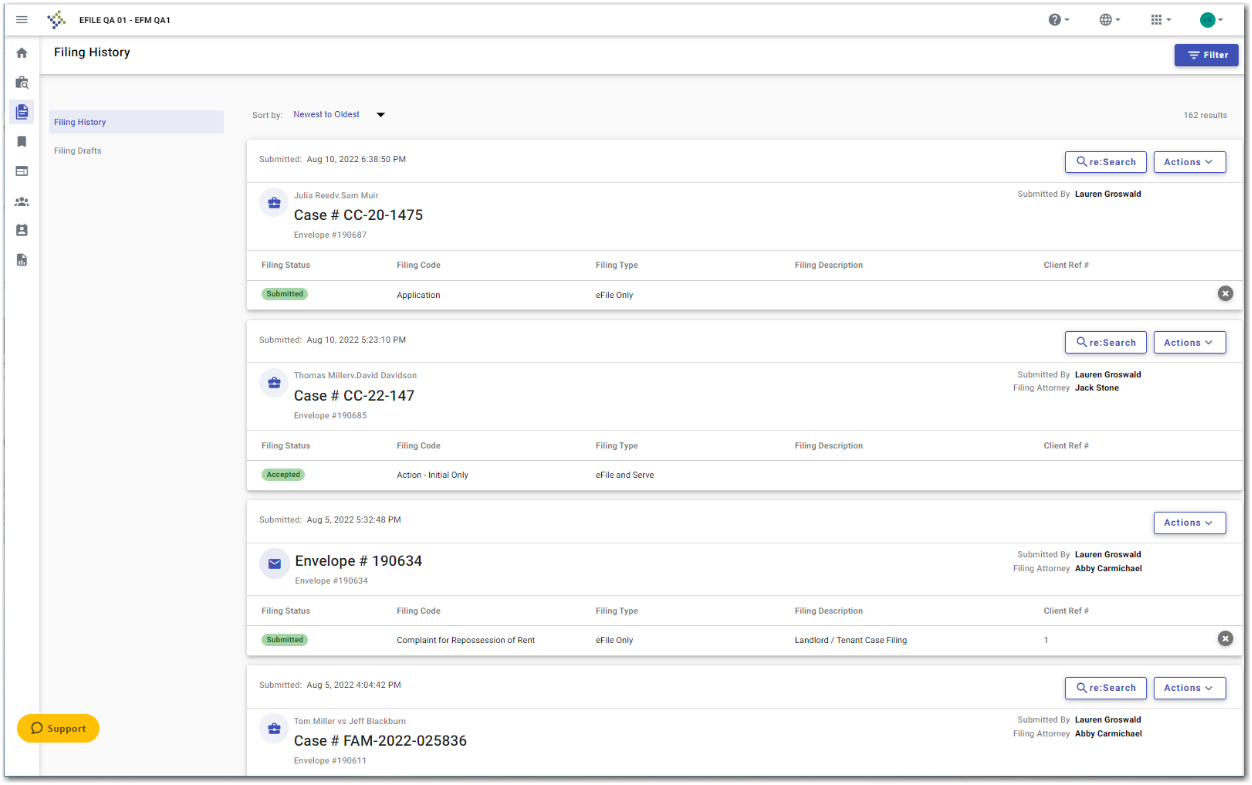



**Figure 14.22 – Example of a Filing History Page**

2. Locate the case for which you want to view the service contacts.

3. Click 

.

   The actions menu for the specified case is displayed.

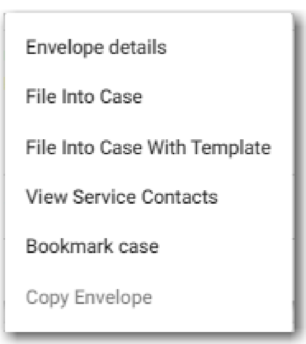



**Figure 14.23 – Actions Menu**

4. From the actions menu, click **View Service Contacts**.

   The service contacts for the case are displayed.

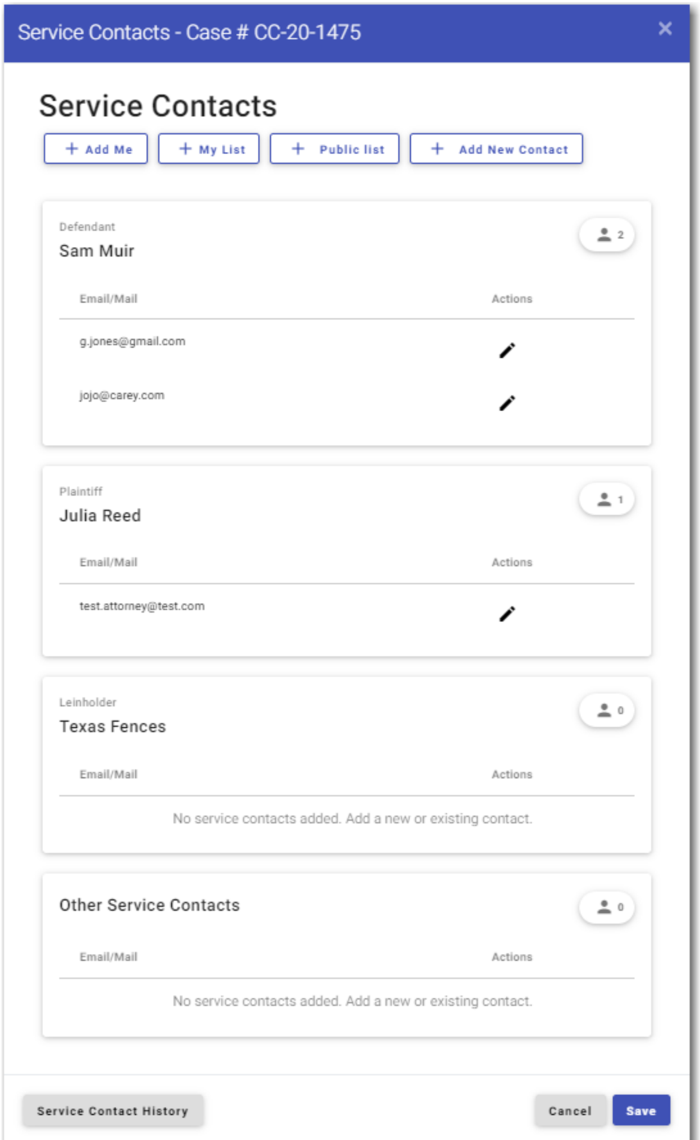



**Figure 14.24 – Example of a Case Service Contacts Window**

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

   The *Update Service Contact* window is displayed.

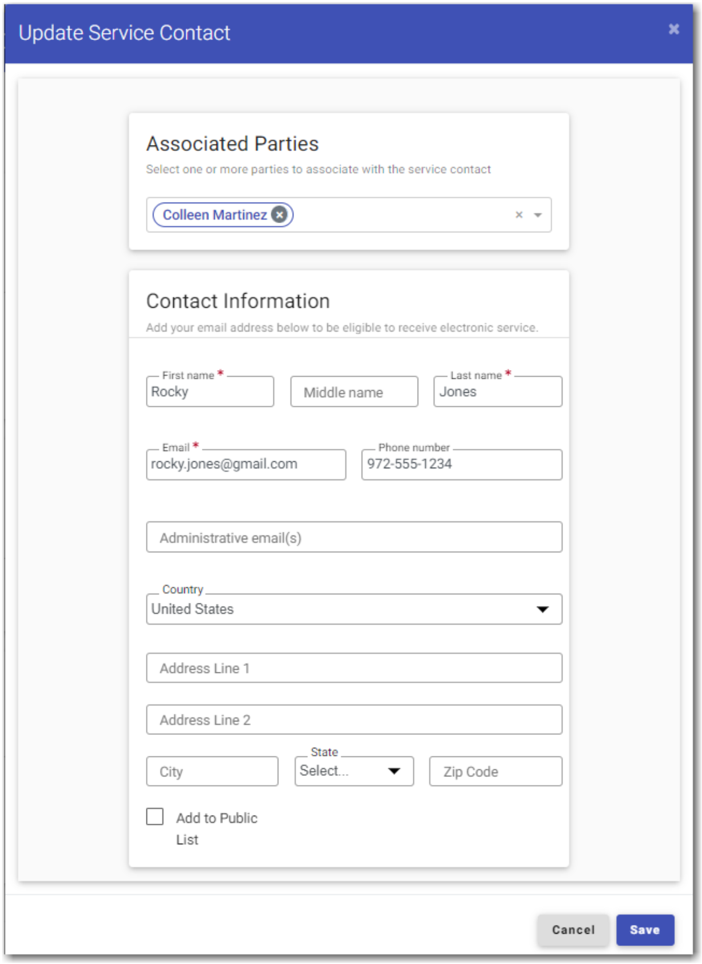



**Figure 14.25 – Example of an Update Service Contact Window**

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 *My Service Contacts* page:

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

   The *My Service Contacts* page is displayed.

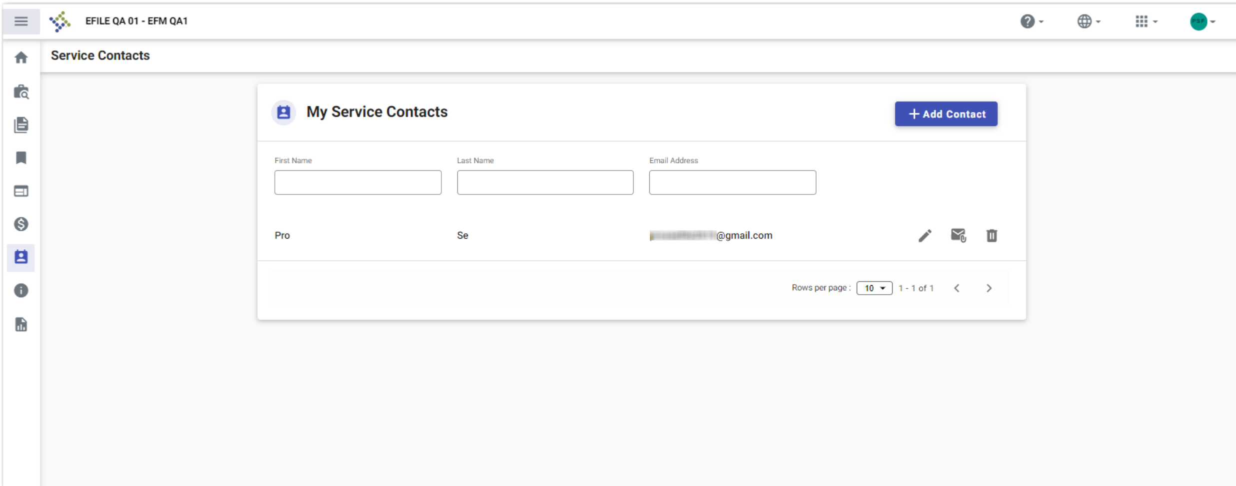



**Figure 14.26 – Example of a My Service Contacts Page**

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.**

# 15 Templates

**Topics covered in this chapter**



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.

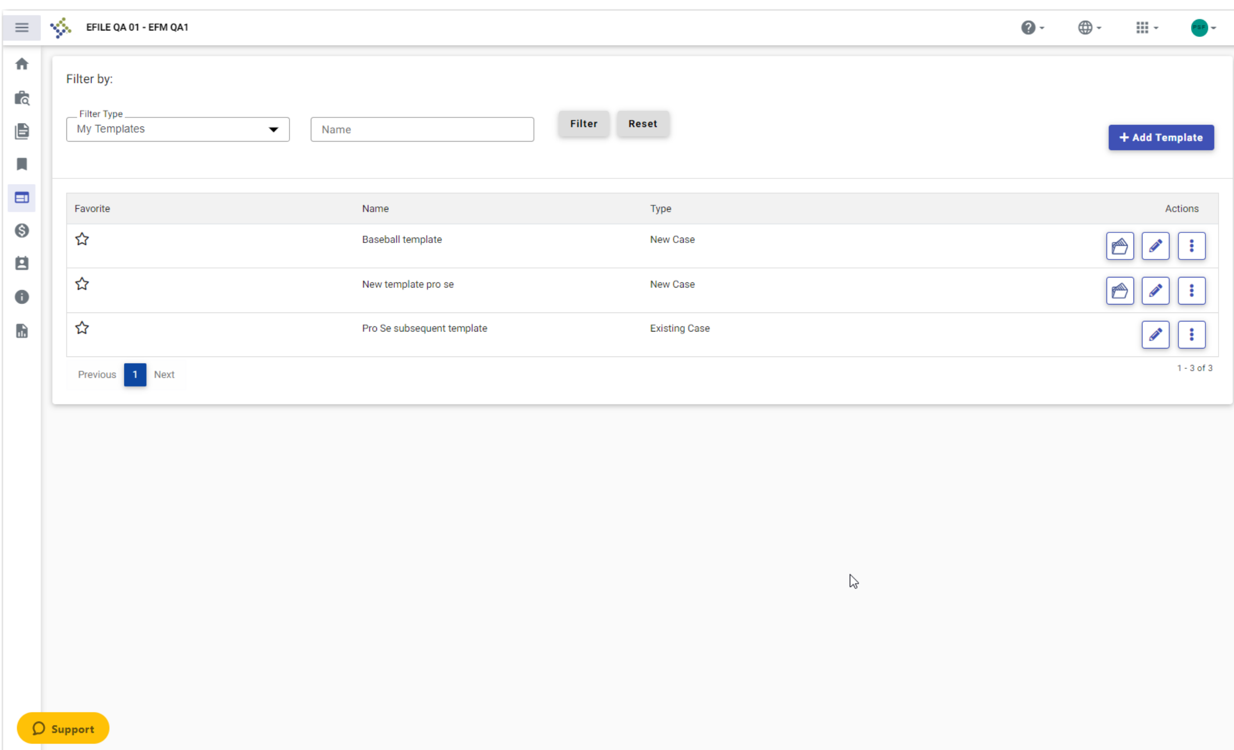



**Figure 15.1 – Templates Page**

2. Click 

.

A pane is displayed.

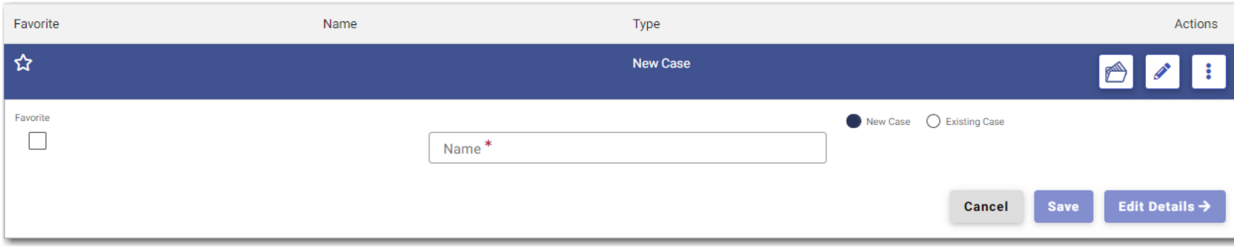



**Figure 15.2 – Templates Pane**

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.

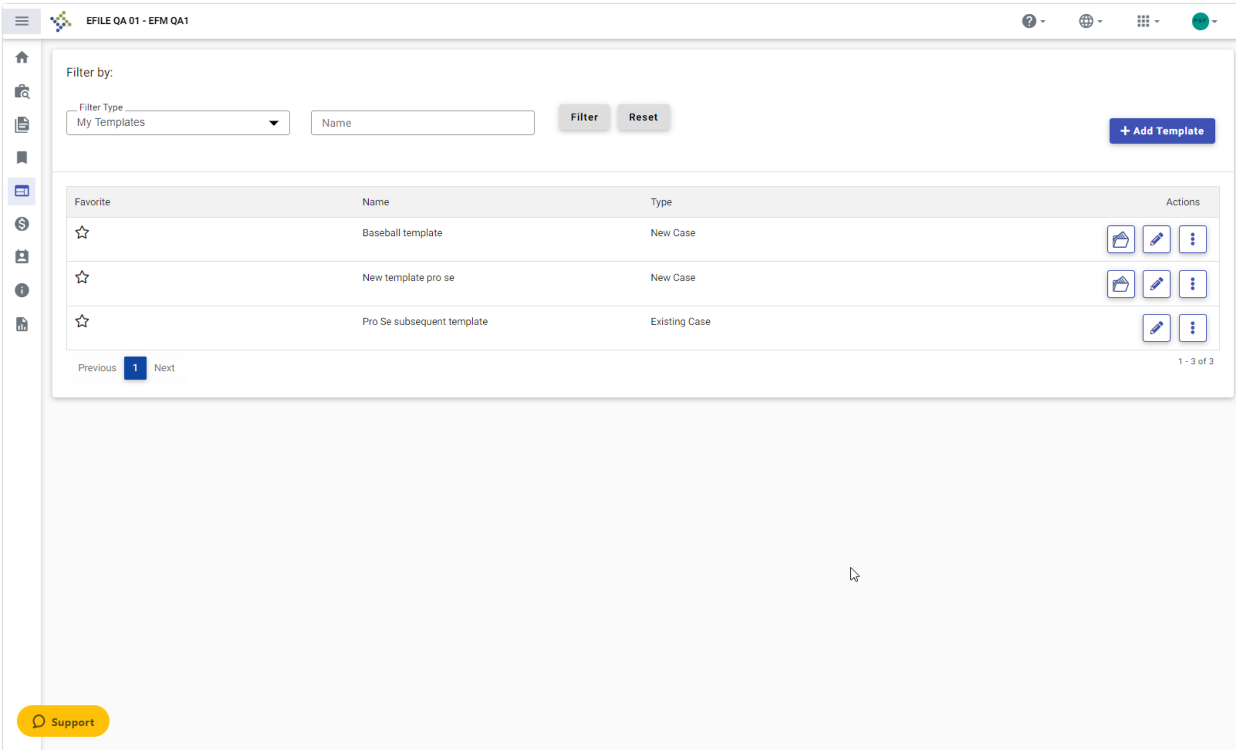



**Figure 15.3 – Templates Page**

2. Locate the template that you want to edit, and then click .

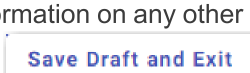
   The template name is displayed in a separate pane.

   **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.

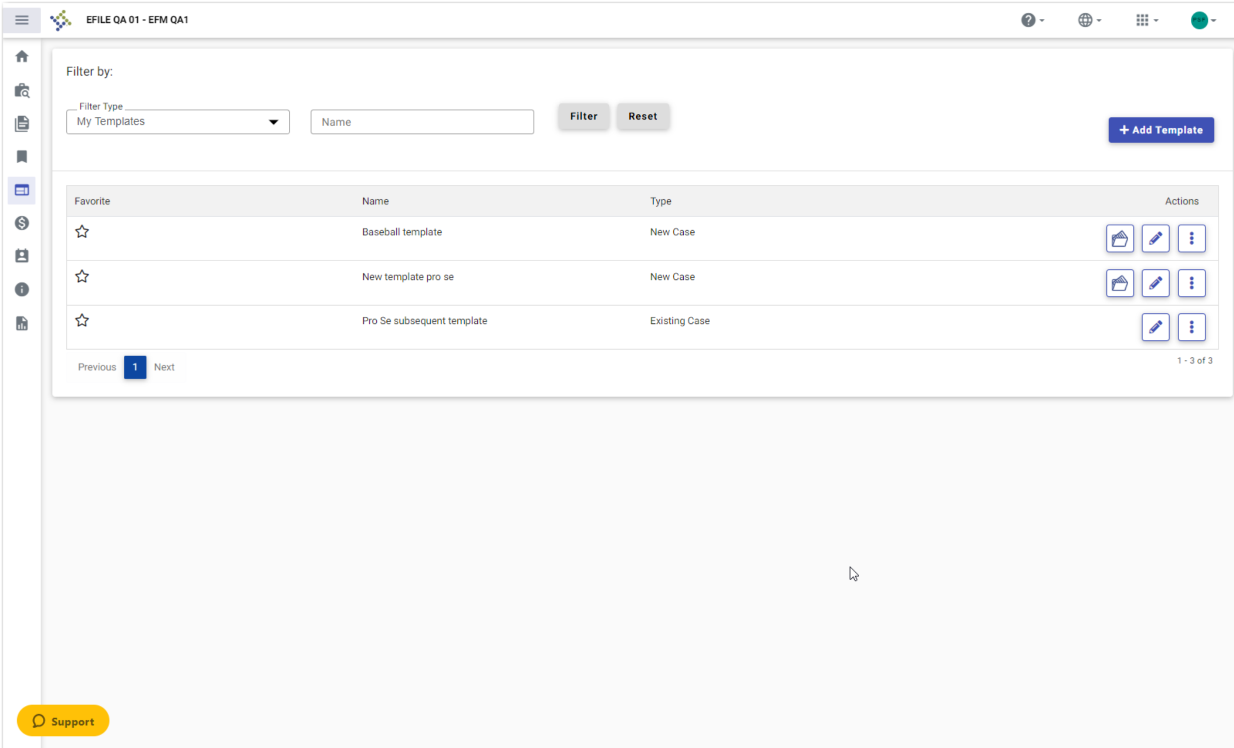
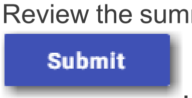



**Figure 15.4 – Templates Page**

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.

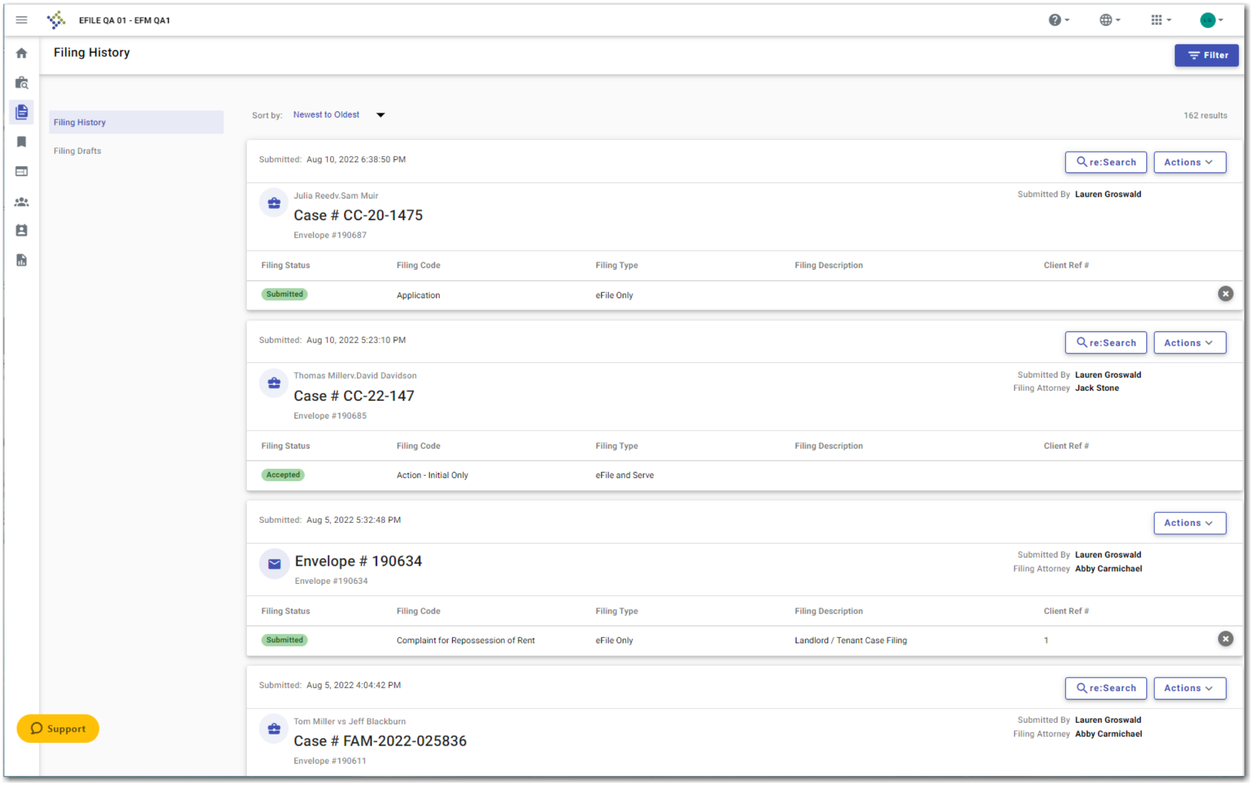



**Figure 15.5 – Example of a Filing History Page**

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.

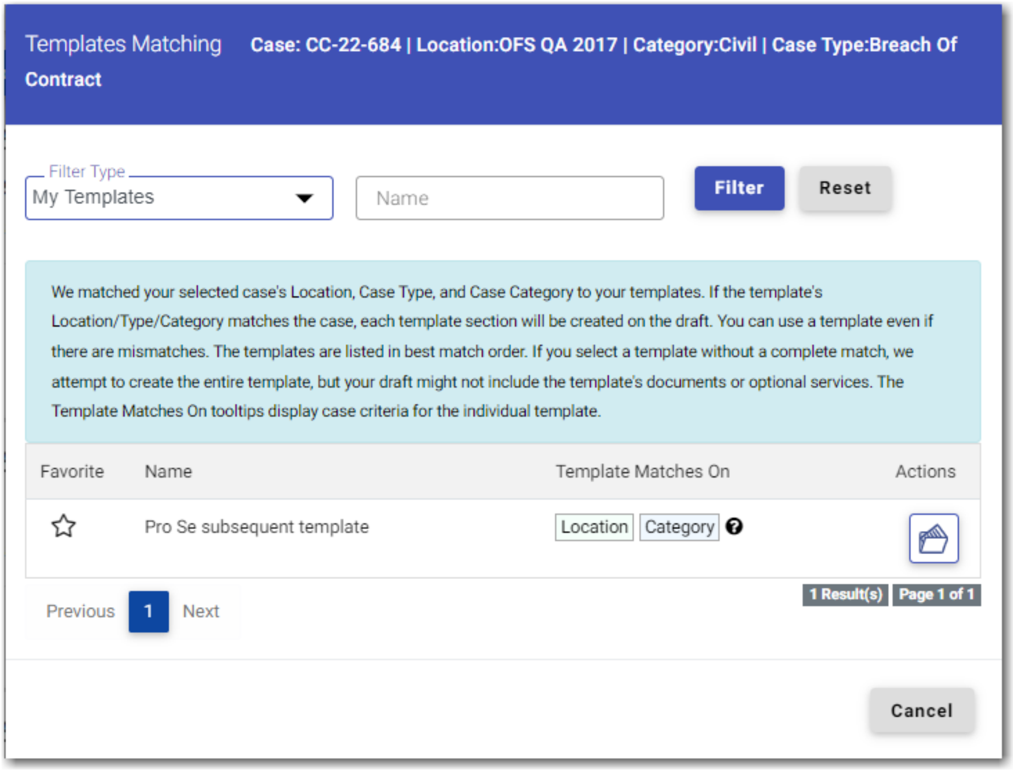
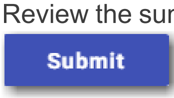



**Figure 15.6 – Example of a Templates Matching Window**

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.

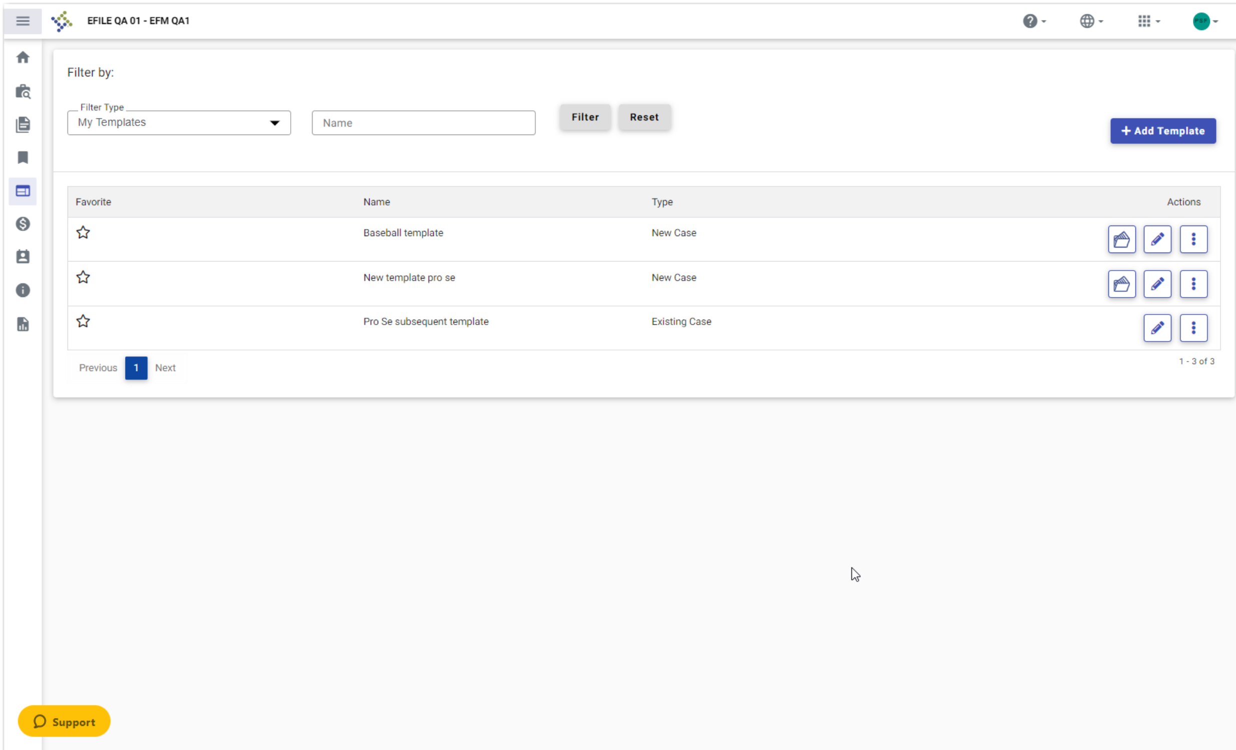
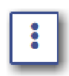



Figure 15.7 – Templates Page

2. Locate the template that you want to copy, and then click  .

   A drop-down list is displayed.

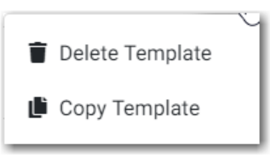



Figure 15.8 – More Options Drop-Down List

3. Click **Copy Template**.

   The template name is displayed in a separate pane with “Copy” as part of the name.
4. Rename the template to a different name.
5. Select the **Favorite** check box if you want to designate this template as a favorite.
6. Click 

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

 to make changes to the template.

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

# Deleting a Template

You can delete a template that you no longer need.

To delete an existing template:

1. On the Dashboard menu, click **Templates**.

   The *Templates* page is displayed.

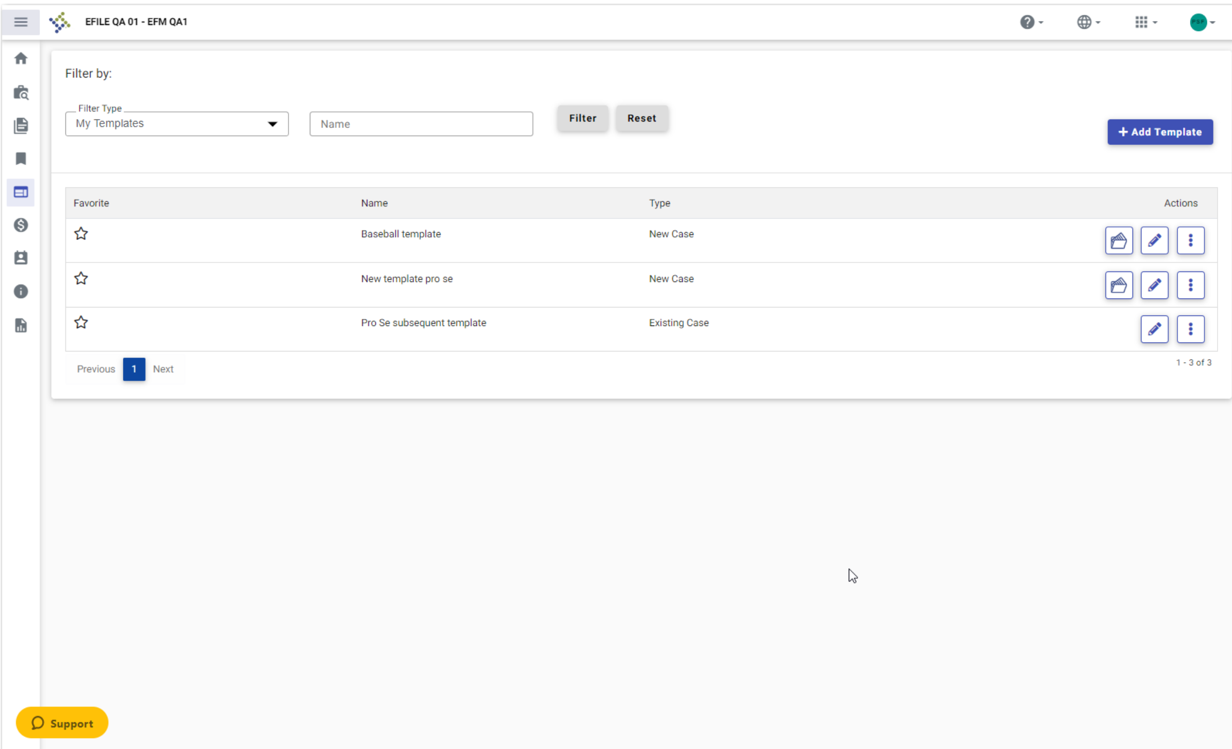



Figure 15.9 – Templates Page

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

   A drop-down list is displayed.

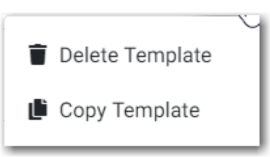
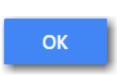
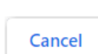



Figure 15.10 – More Options Drop-Down List

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 **OK**, a confirmation message is displayed, and the template is deleted.

# 16 Filings

**Topics covered in this chapter**



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.

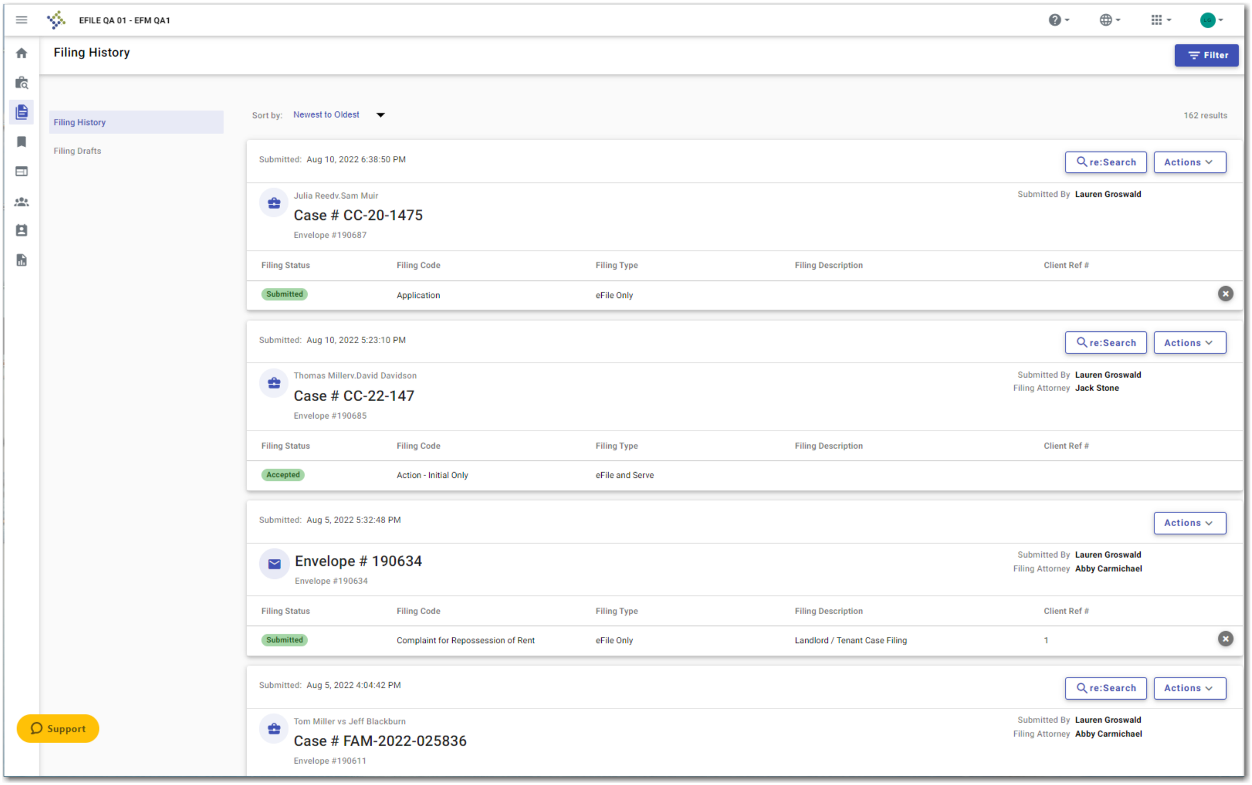



**Figure 16.1 – Example of a Filing History Page**

2. Click  .

   The Filters pane is displayed.

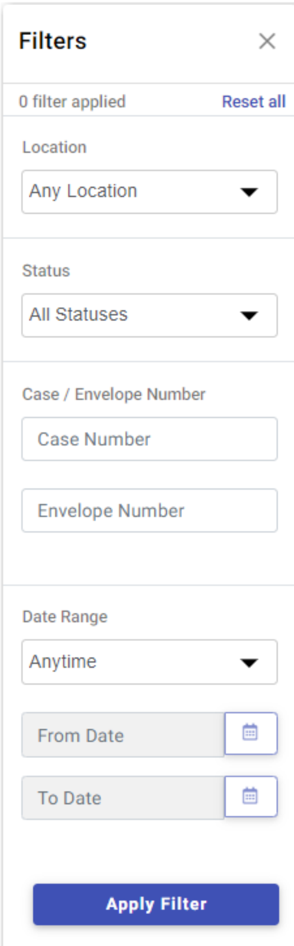



**Figure 16.2 – Filters Pane**

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.

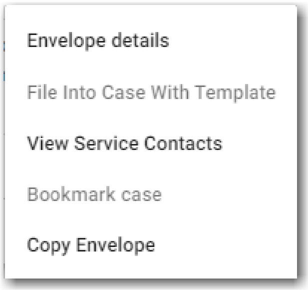



**Figure 16.3 – Actions Menu**

7. Click **Copy Envelope**.

   A copy of the envelope is displayed on the *Case Information* page.

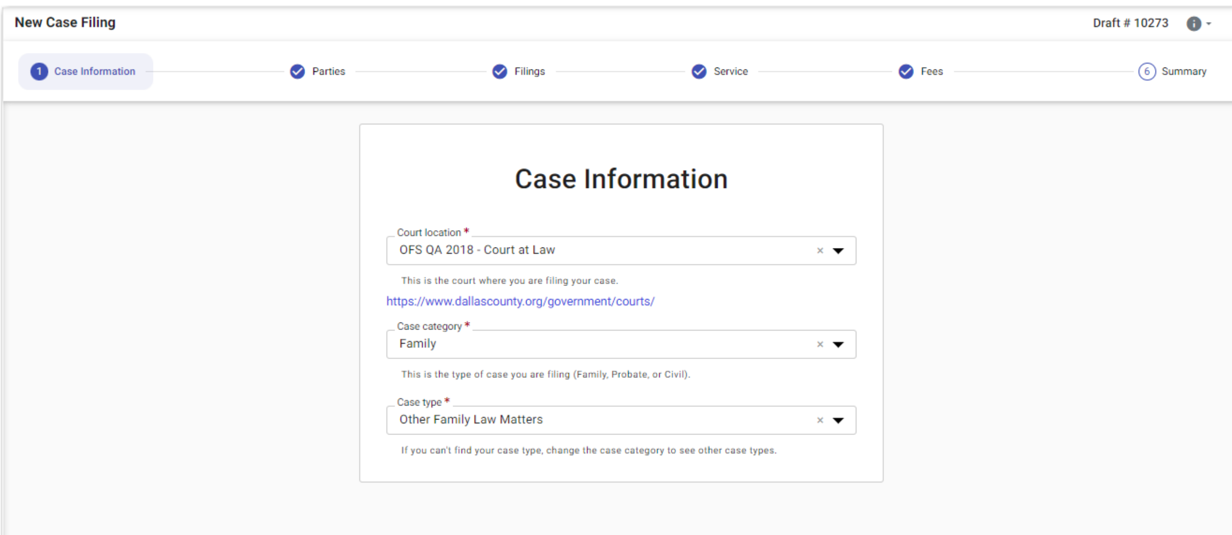



**Figure 16.4 – Example of a Case Information Page for a Copied Envelope**

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.**

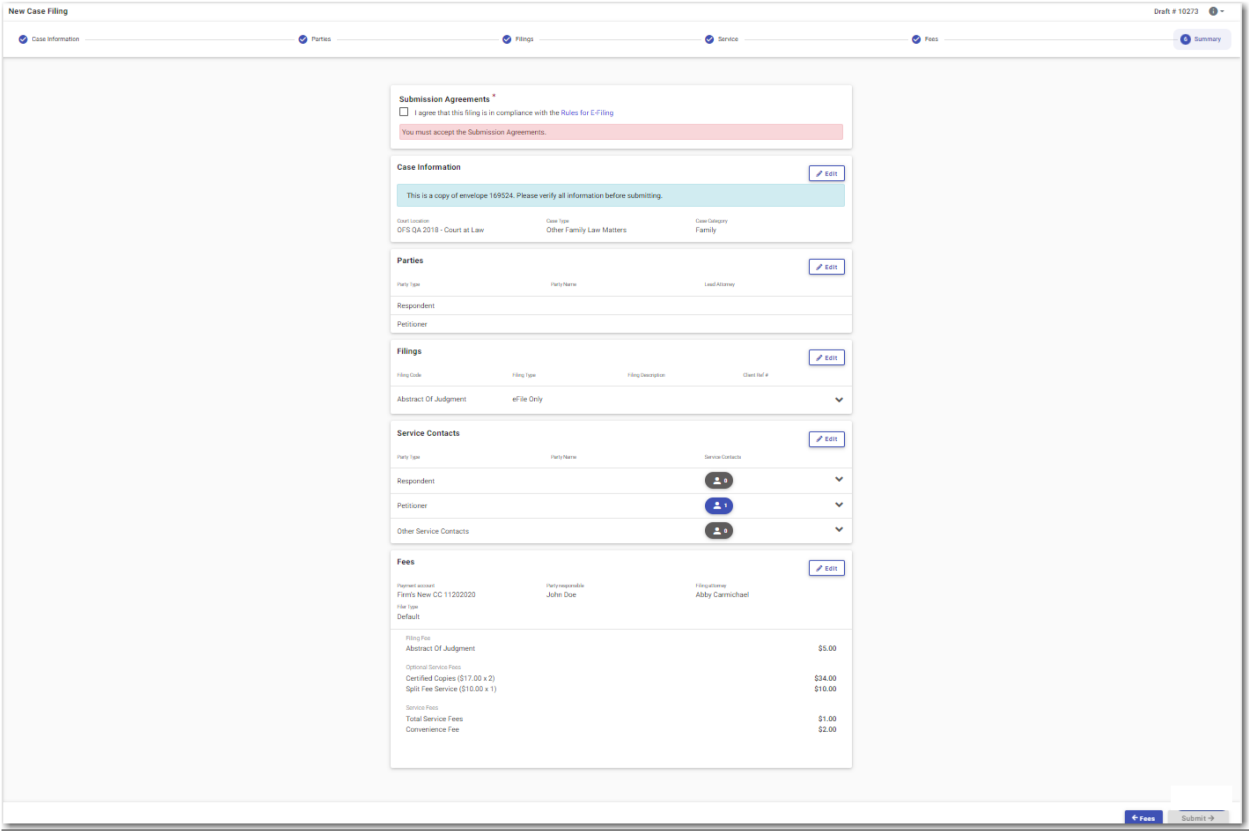



**Figure 16.5 – Example of a Summary Page for a Copied Envelope**

# 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.

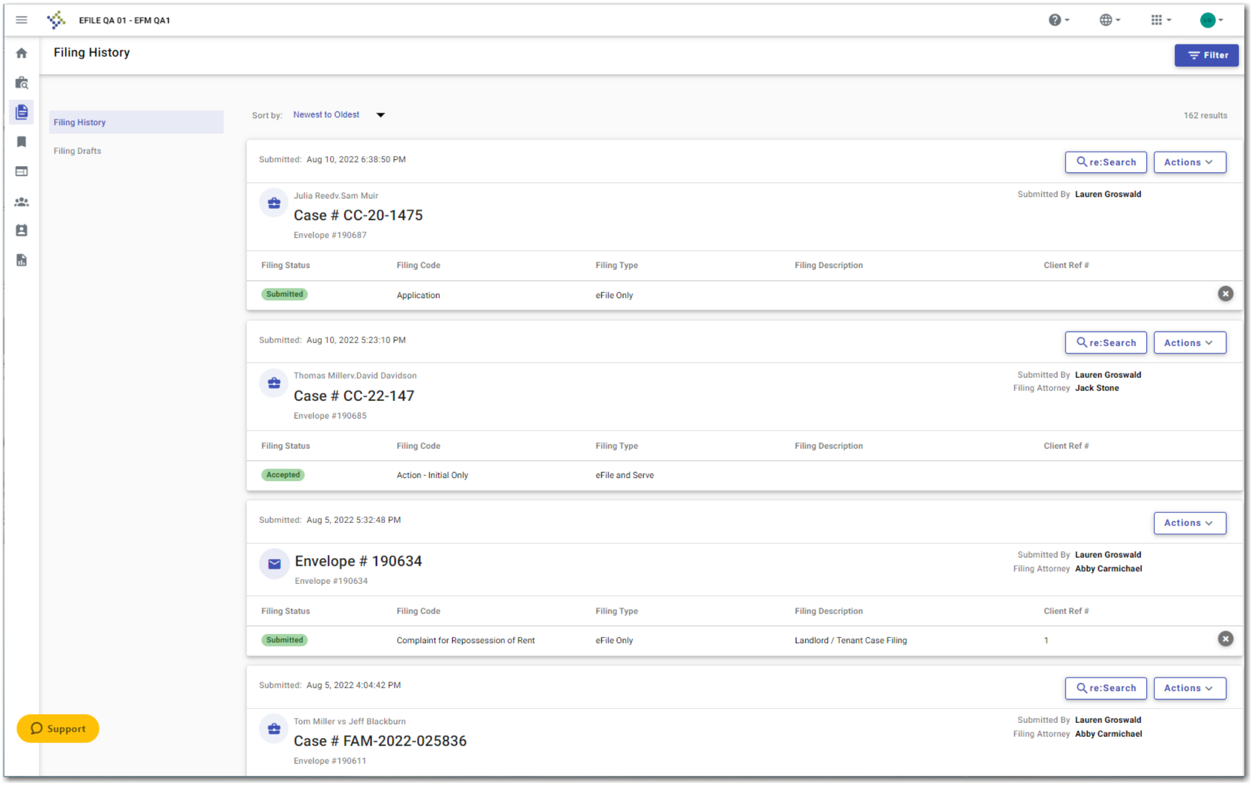



**Figure 16.6 – Example of a Filing History Page**

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

3. Click 

.

   The actions menu for the specified envelope is displayed.

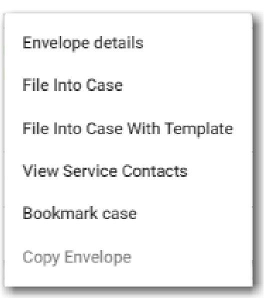



**Figure 16.7 – Actions Menu**

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.**

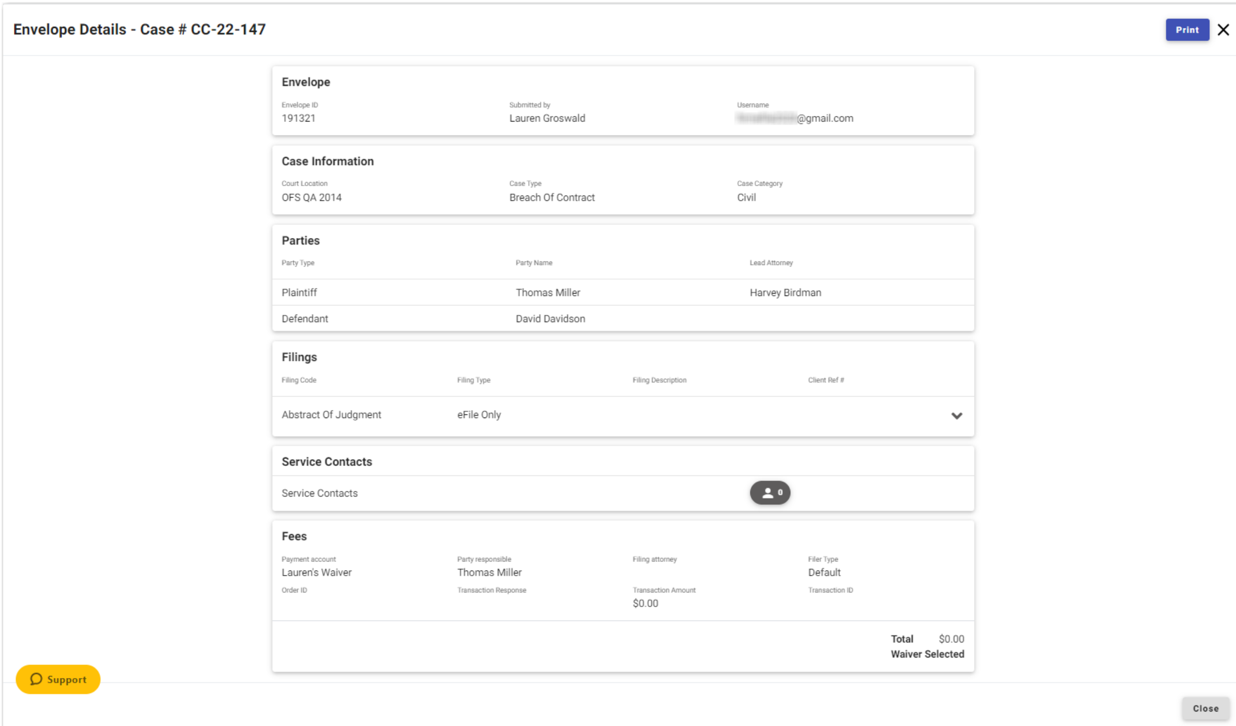



**Figure 16.8 – Example of an Envelope Details Page**

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.

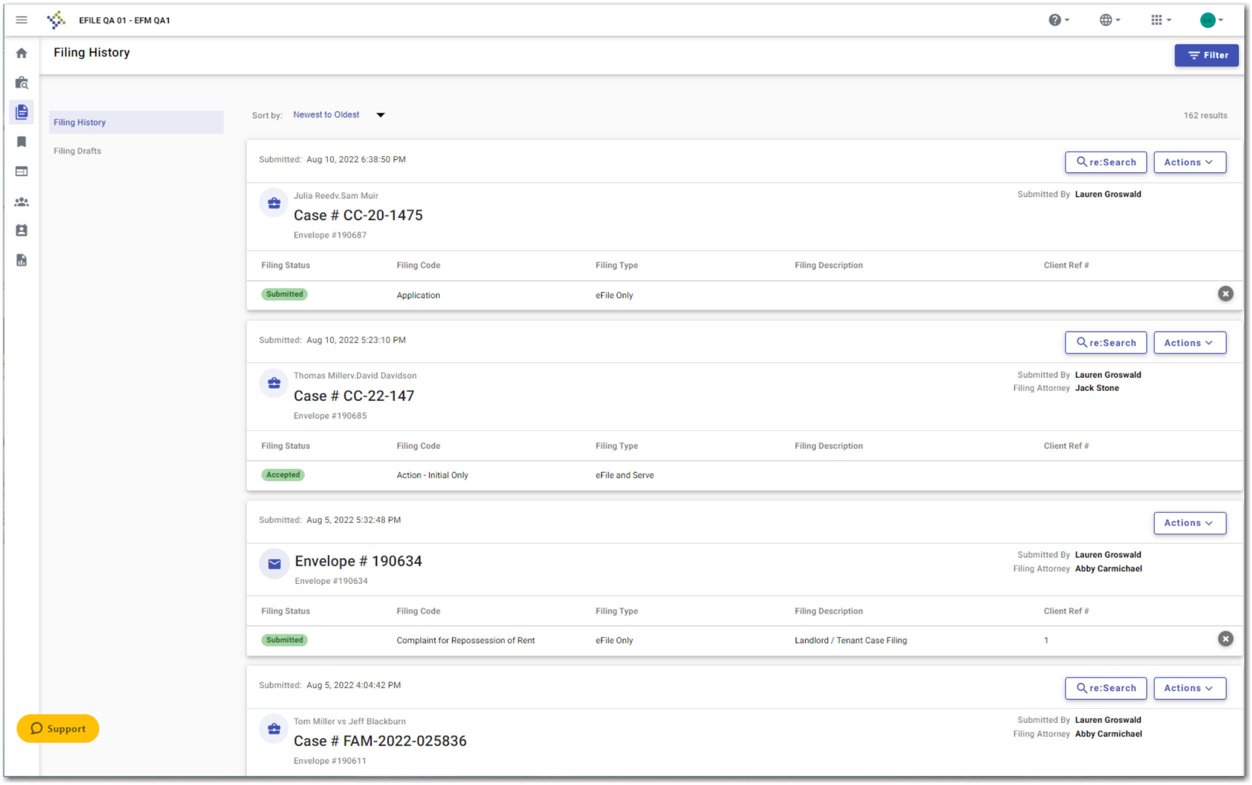



Figure 16.9 – Example of a Filing History Page

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

3. Click 

.

   The actions menu for the specified envelope is displayed.

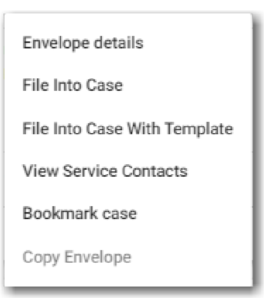



Figure 16.10 – Actions Menu

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

   The envelope details are displayed.

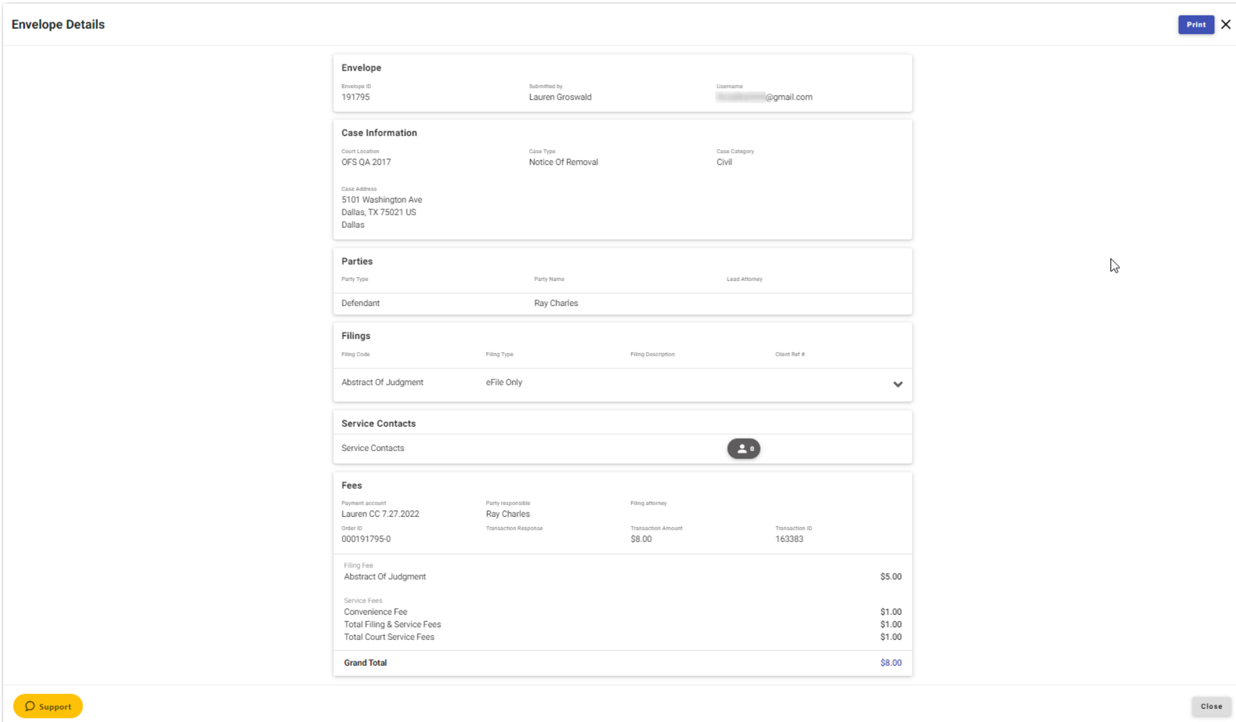



**Figure 16.11 – Example of the Case Address Information on the Envelope Details Page**

5. Click **Print** 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:

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

   The *Filing History* page is displayed.

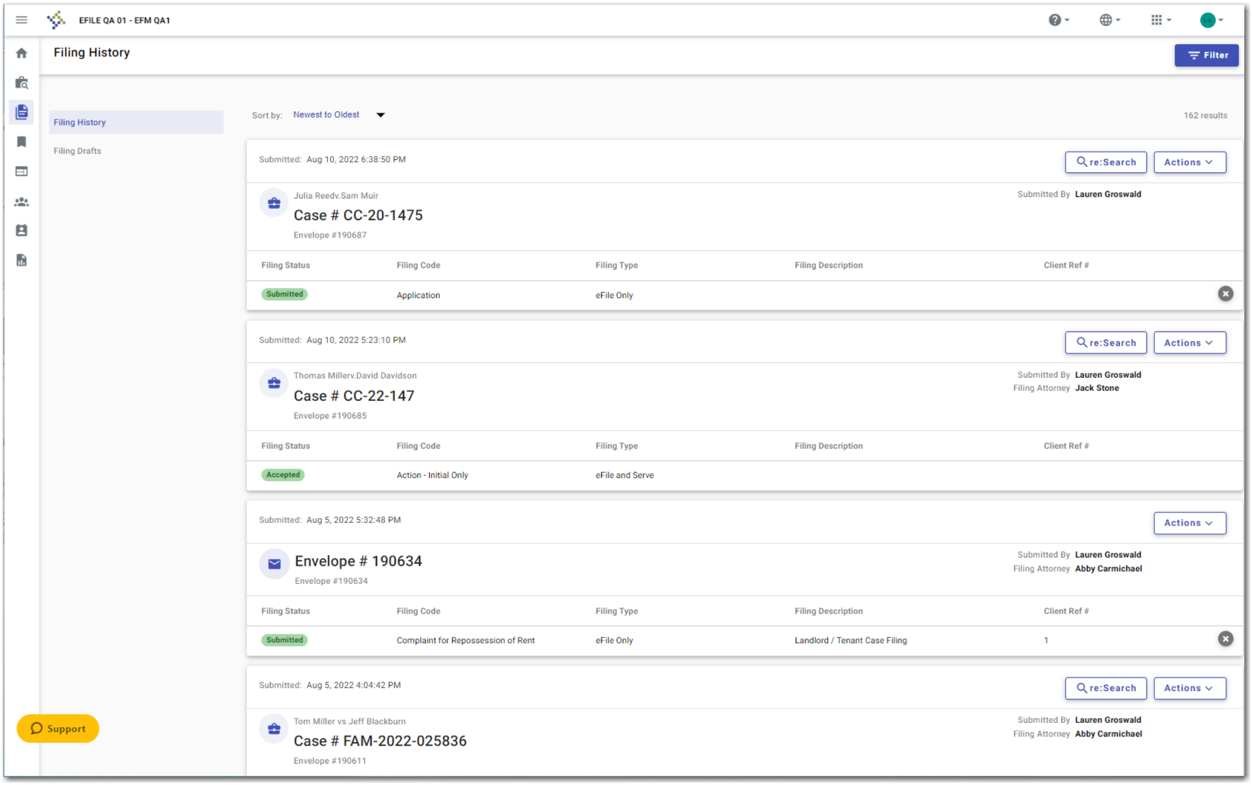


Figure 16.12 – Example of a Filing History Page

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

3. Click 

.

   The actions menu for the specified envelope is displayed.

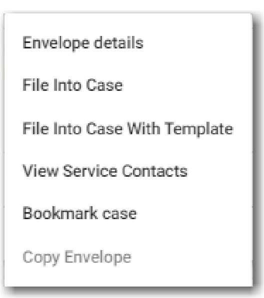


Figure 16.13 – Actions Menu

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.**

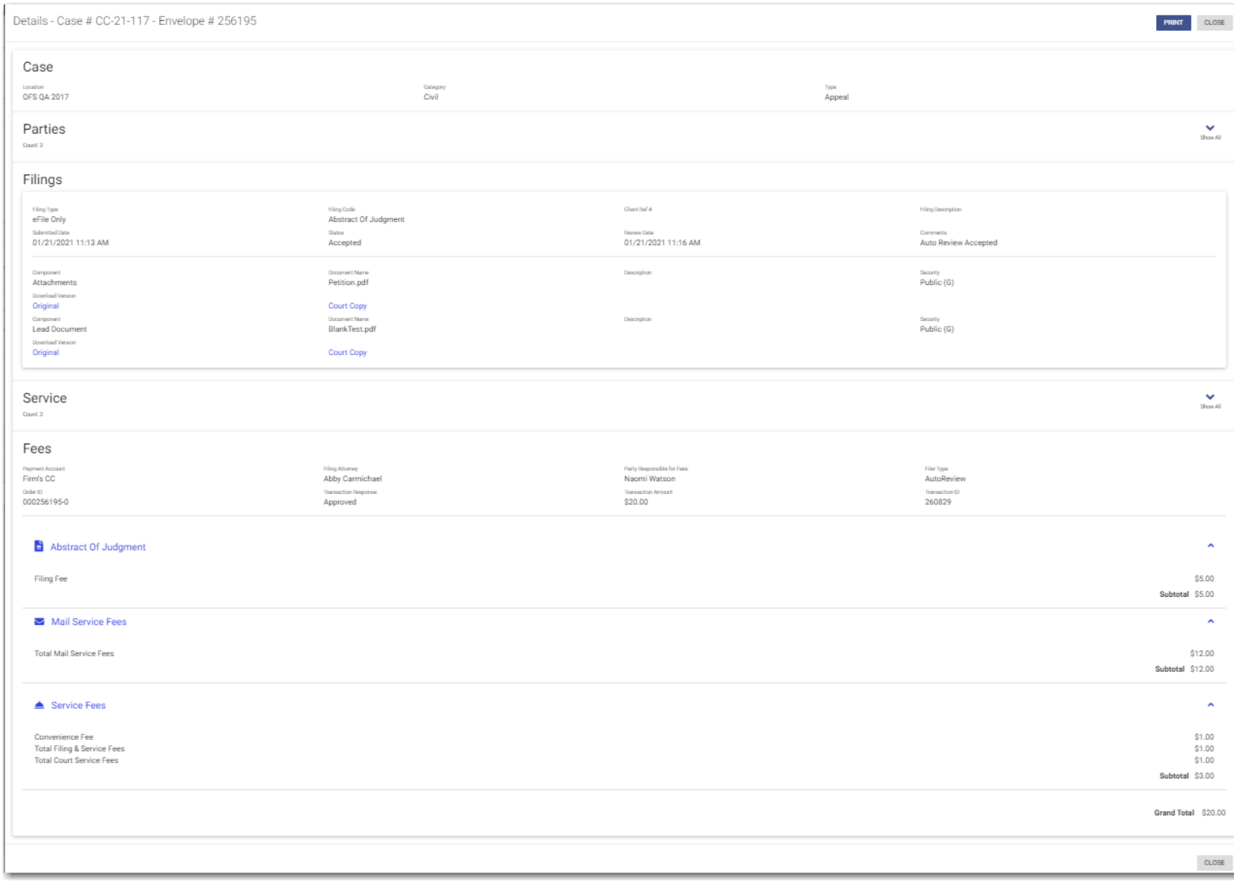



**Figure 16.14 – Example of an Envelope Details Page with the Mail Service Fees Displayed**

5. 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:

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

   The *Filing History* page is displayed.

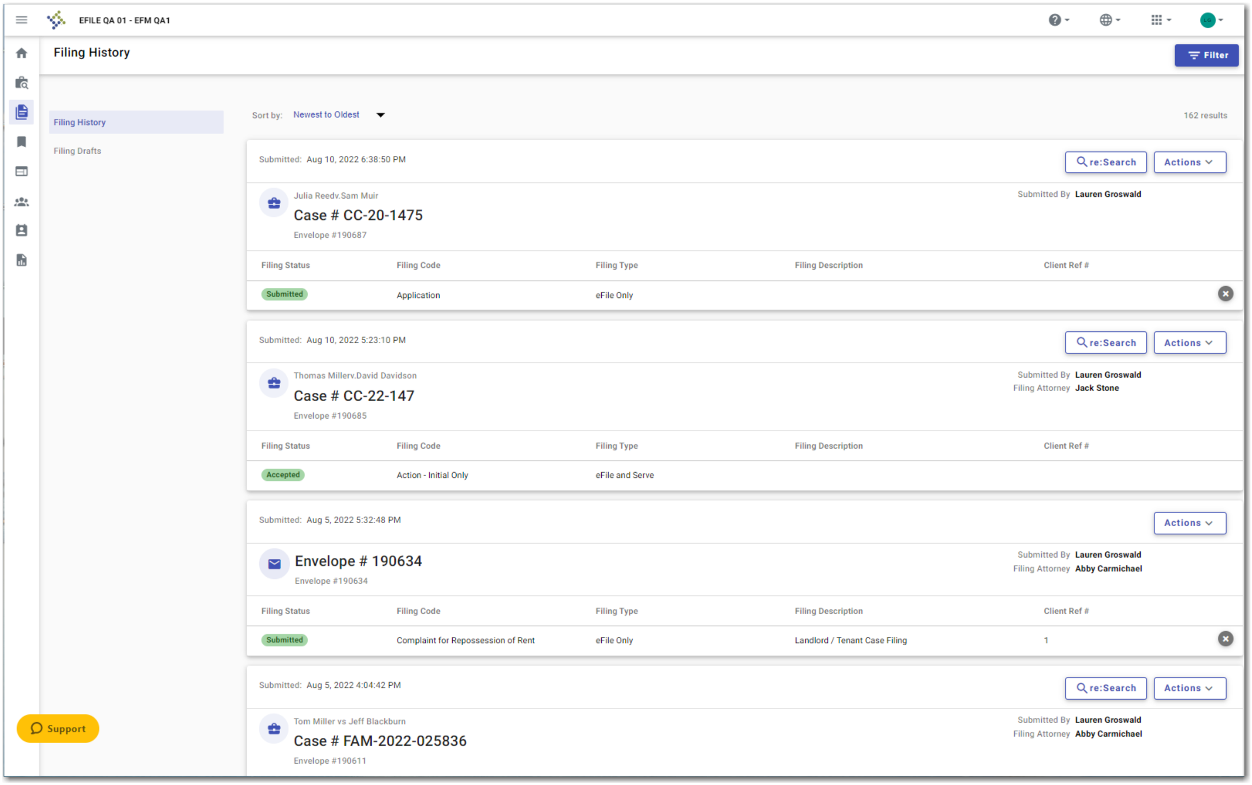



**Figure 16.15 – Example of a Filing History Page**

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

3. Click 

.

   The actions menu for the specified envelope is displayed.

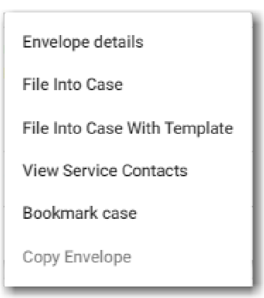



**Figure 16.16 – Actions Menu**

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

   The envelope details are displayed.

   **Note: Your screen may differ from the example provided below.**

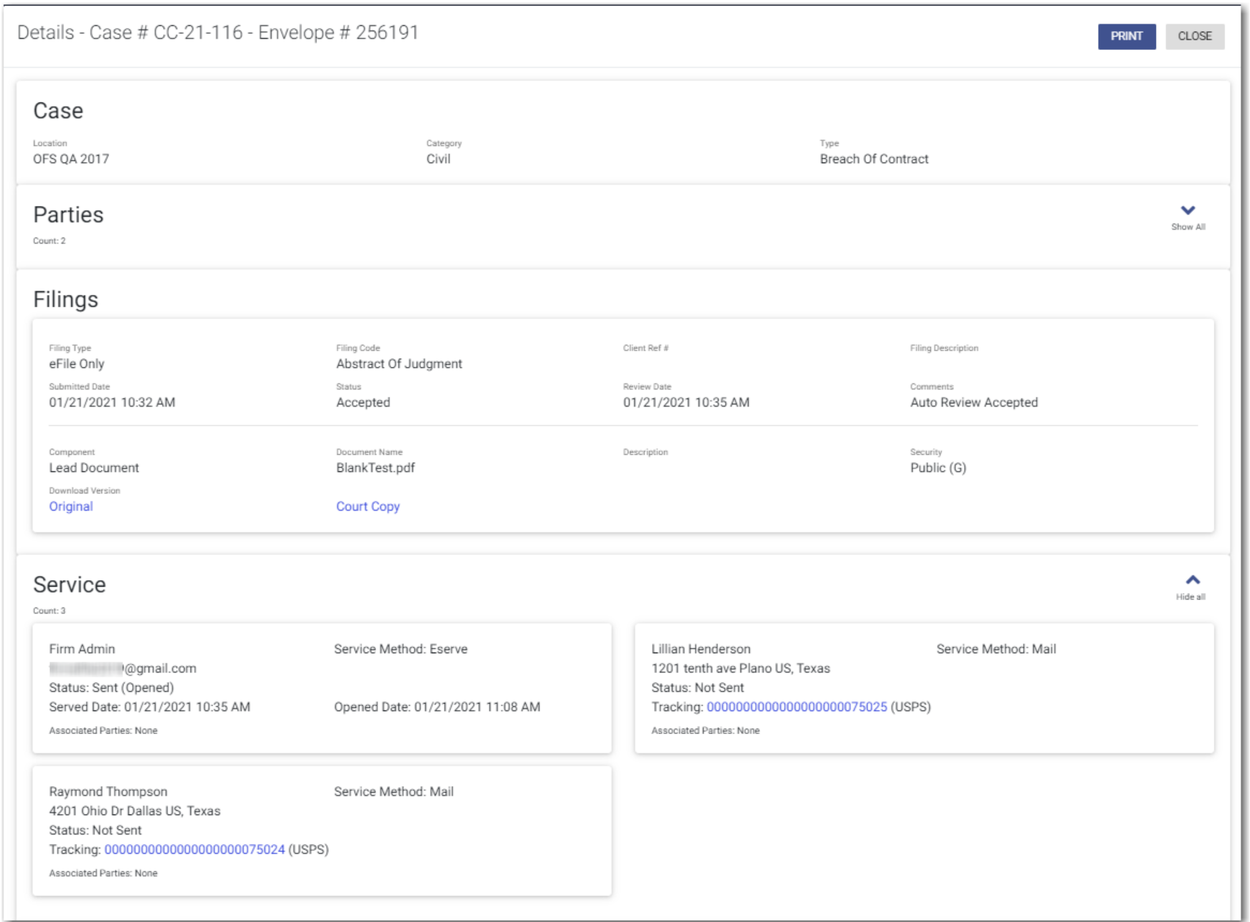



**Figure 16.17 – Example of an Envelope Details Page with the Certified Mail Services Information Displayed**

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.

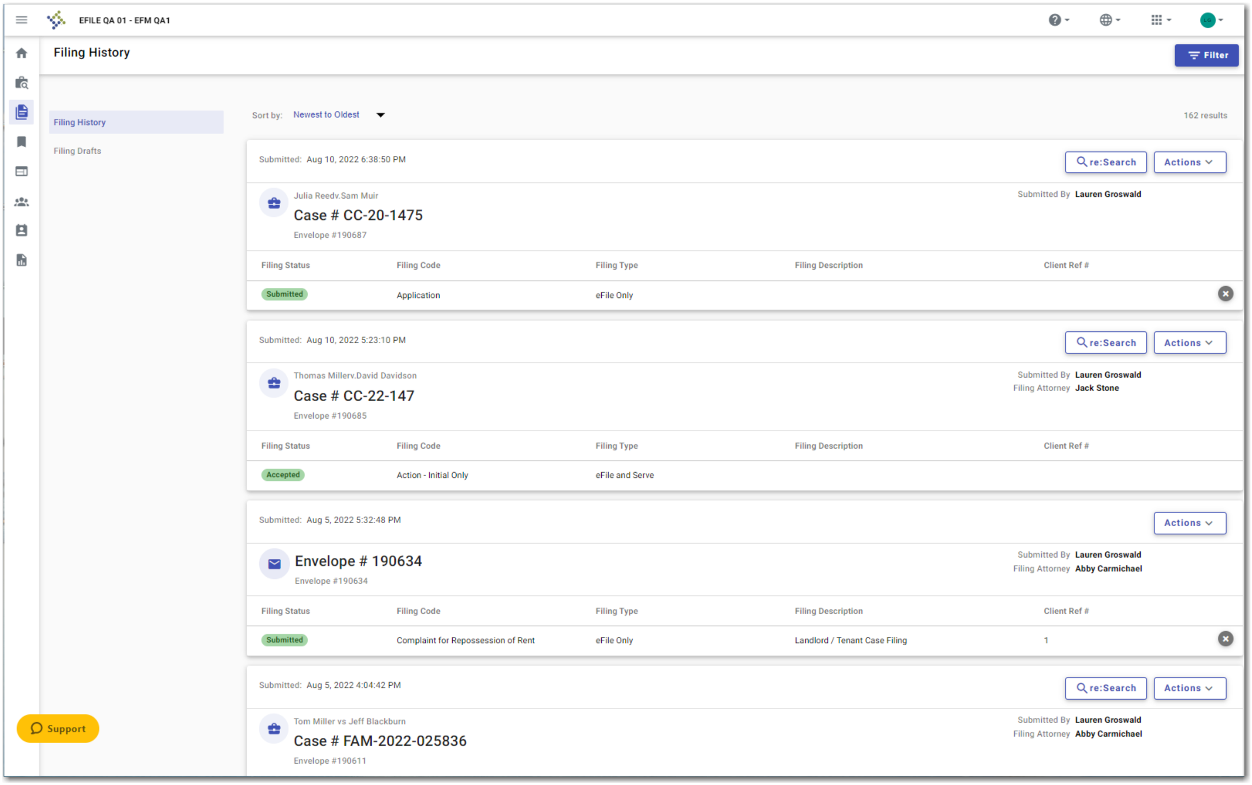


**Figure 16.18 – Example of a Filing History Page**

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

3. Click 

.

   The actions menu for the specified envelope is displayed.

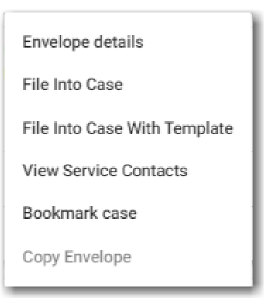


**Figure 16.19 – Actions Menu**

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

   The envelope comments are displayed in the envelope details in the Case Information pane.

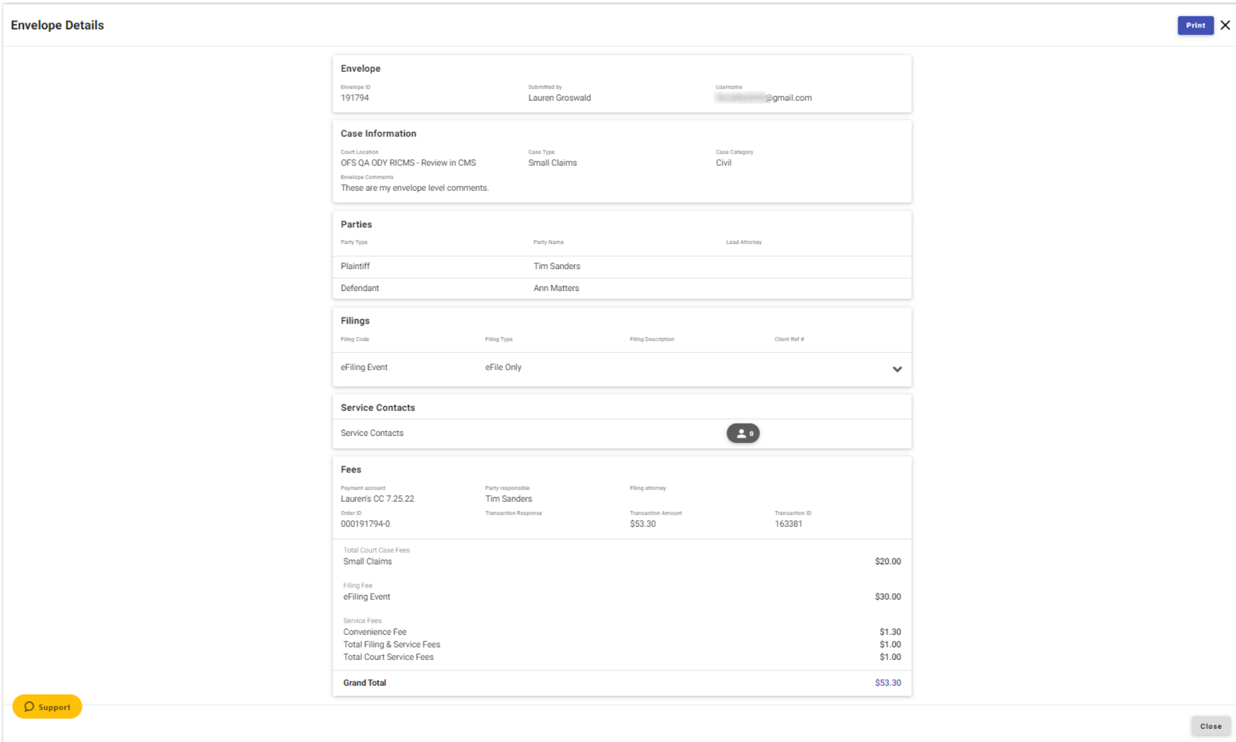



**Figure 16.20 – Example of an Envelope Details Page with the Envelope Comments Displayed**

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.

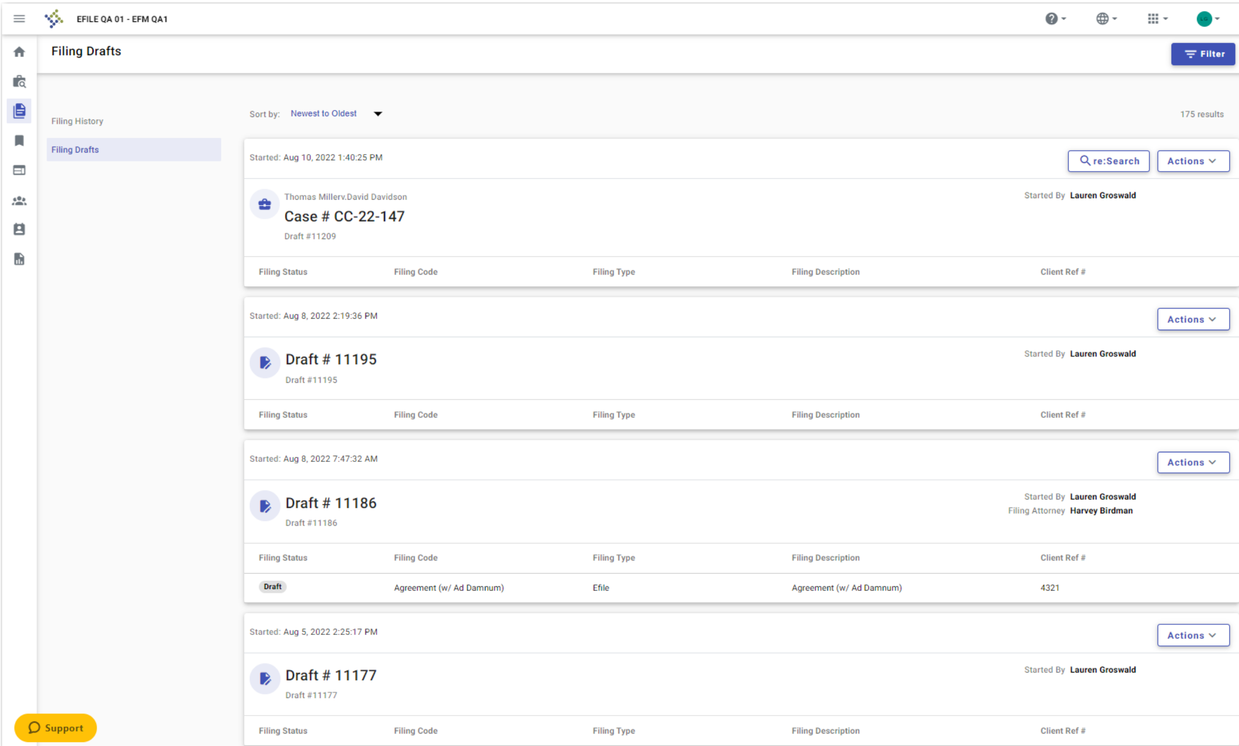



**Figure 16.21 – Example of a Filing Drafts Page**

2. Click **Actions**.

   The actions menu for the specified draft is displayed.

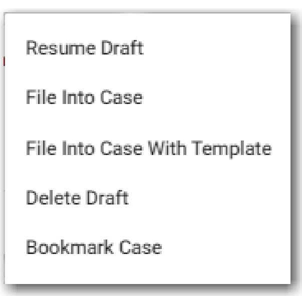



**Figure 16.22 – Actions Menu**

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 **Submit**.

# 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.

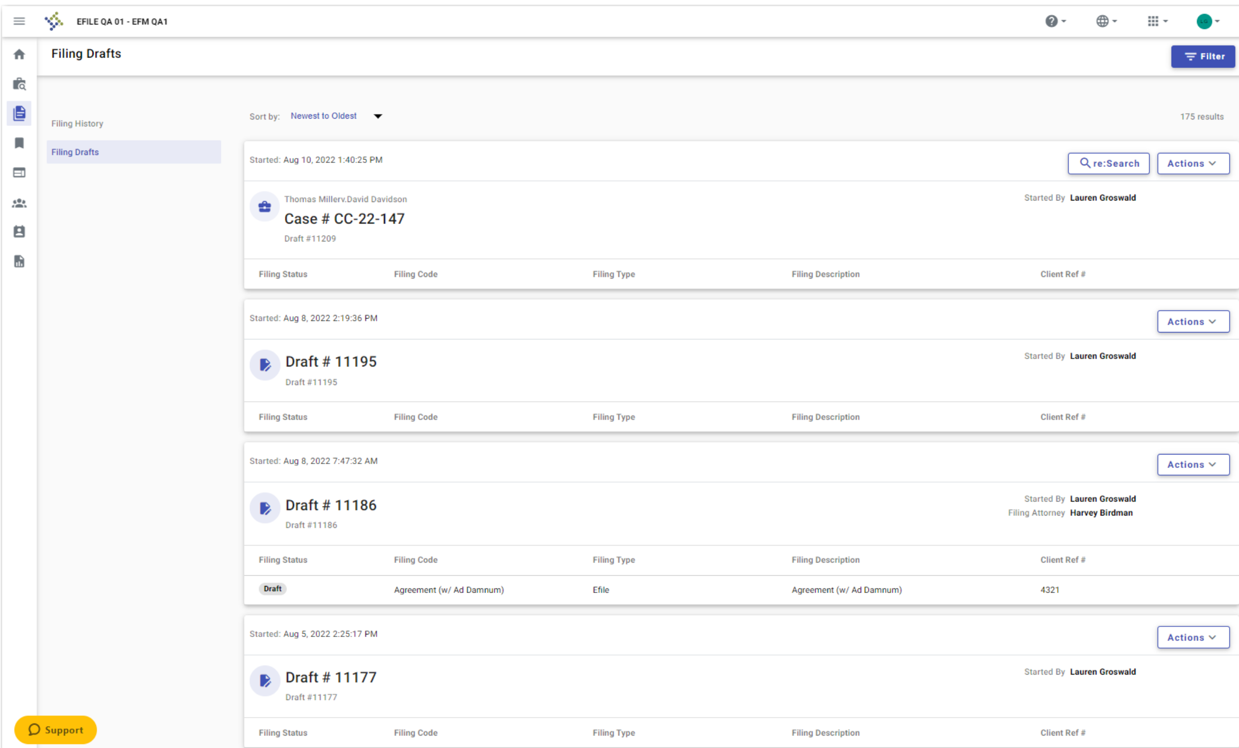



**Figure 16.23 – Example of a Filing Drafts Page**

2. Locate the draft filing that you want to delete, and then click 

.

   The actions menu for the specified draft is displayed.

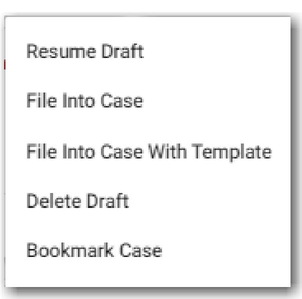



**Figure 16.24 – Actions Menu**

3. Click **Delete Draft**.

   The following warning message is displayed: `Are you sure you want to delete Draft # "123"?`

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

   If you clicked **OK**, a confirmation message is displayed, and the draft filing is deleted.

# Canceling a Filing

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

To cancel a filing:

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

   The *Filing History* page is displayed.

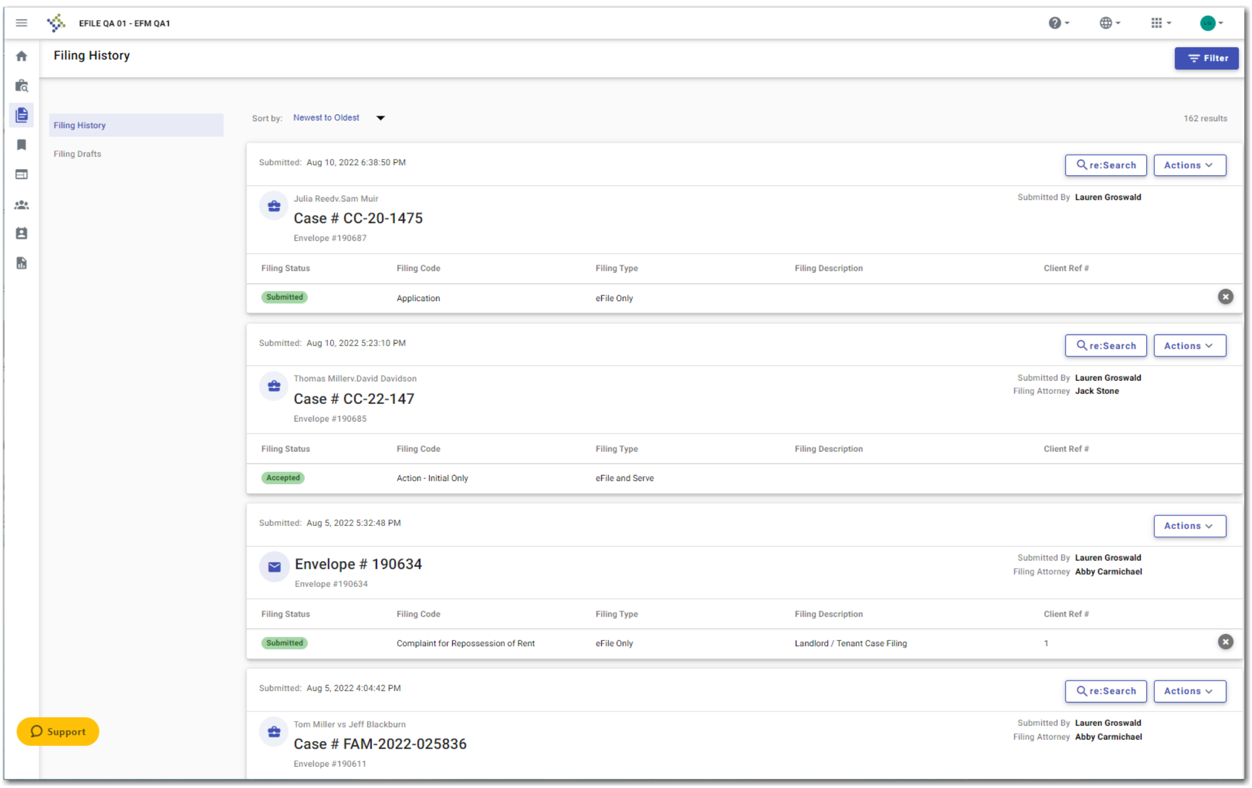



**Figure 16.25 – Example of a Filing History Page**

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 **OK** to cancel the filing, or click **Cancel** to cancel the action.

If you clicked **OK**, a confirmation message is displayed, and the filing is canceled.

# 17 Bookmarks

**Topics covered in this chapter**



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.

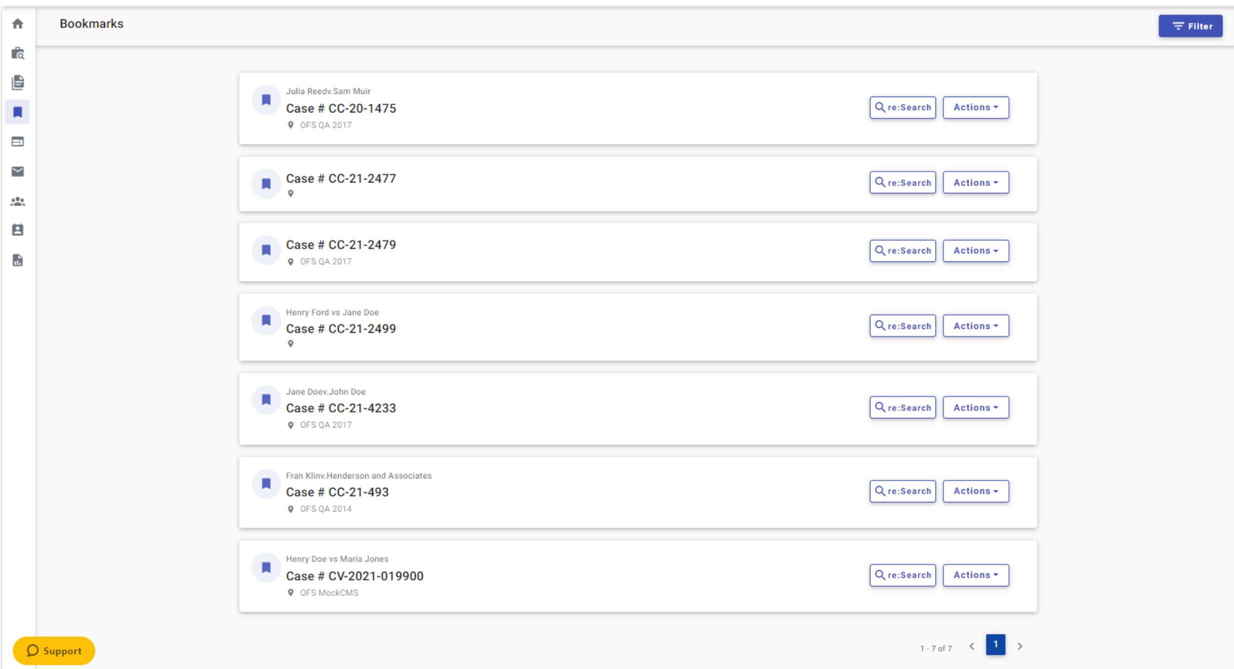



**Figure 17.1 – Example of a Bookmarks Page**

From the *Bookmarks* page, you can take further action on a specified case. Click **Actions ▾** 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 **re:Search**. 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.

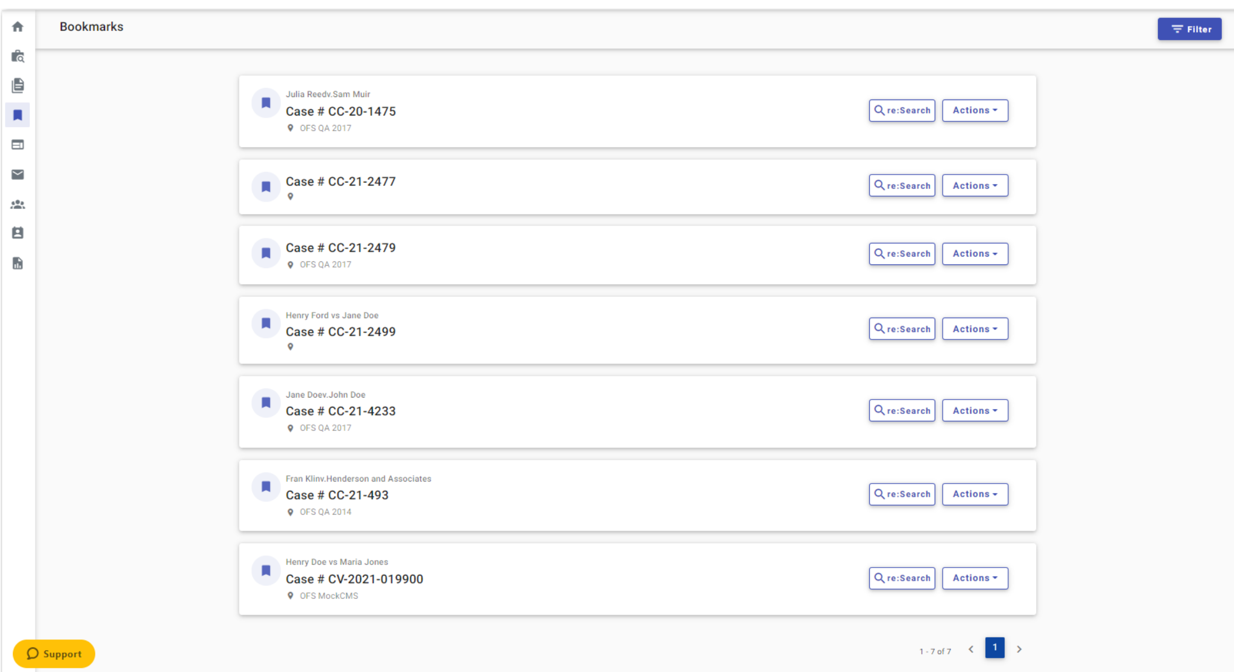



**Figure 17.2 – Example of a Bookmarks Page**

2. Locate the case for which you want to remove the bookmark, and then click 

.

   The actions menu is displayed.

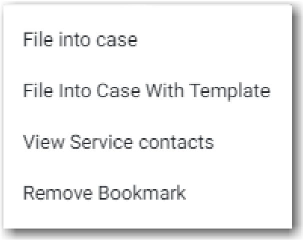
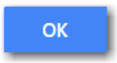
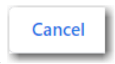



**Figure 17.3 – Actions Menu**

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.

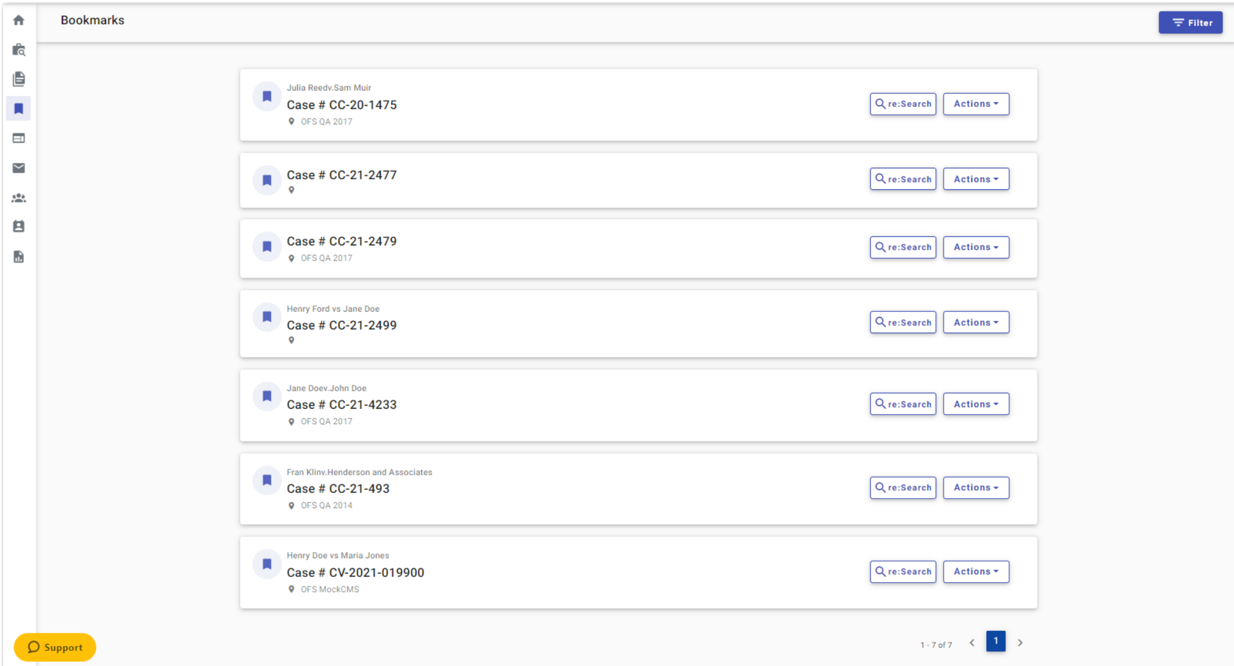



**Figure 17.4 – Example of a Bookmarks Page**

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.

# 18 Bulk Filing

**Topics covered in this chapter**



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.

Click 

when the button is enabled on the *Bulk Filing Dashboard* page.

# Dashboard

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

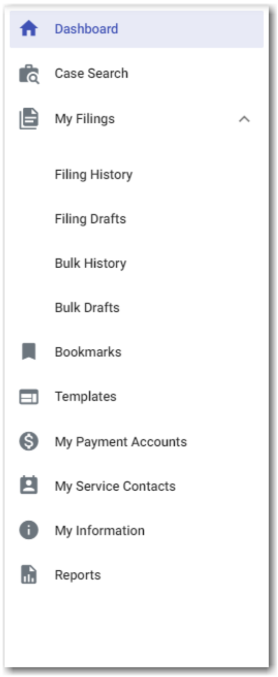



**Figure 18.1 – Example of a Dashboard**

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 bulk filings.
- Access the *Bulk Drafts* page to view a list of your bulk draft filings.

For information regarding the other options displayed on the Dashboard, refer to Dashboard, page 32.

## Bulk History

The *Bulk History* page includes the filing history for your bulk filings.

From the Dashboard menu, click **Bulk History**. From here, you can view a history of your bulk filings. You can also view the details for each case in the bulk filing.

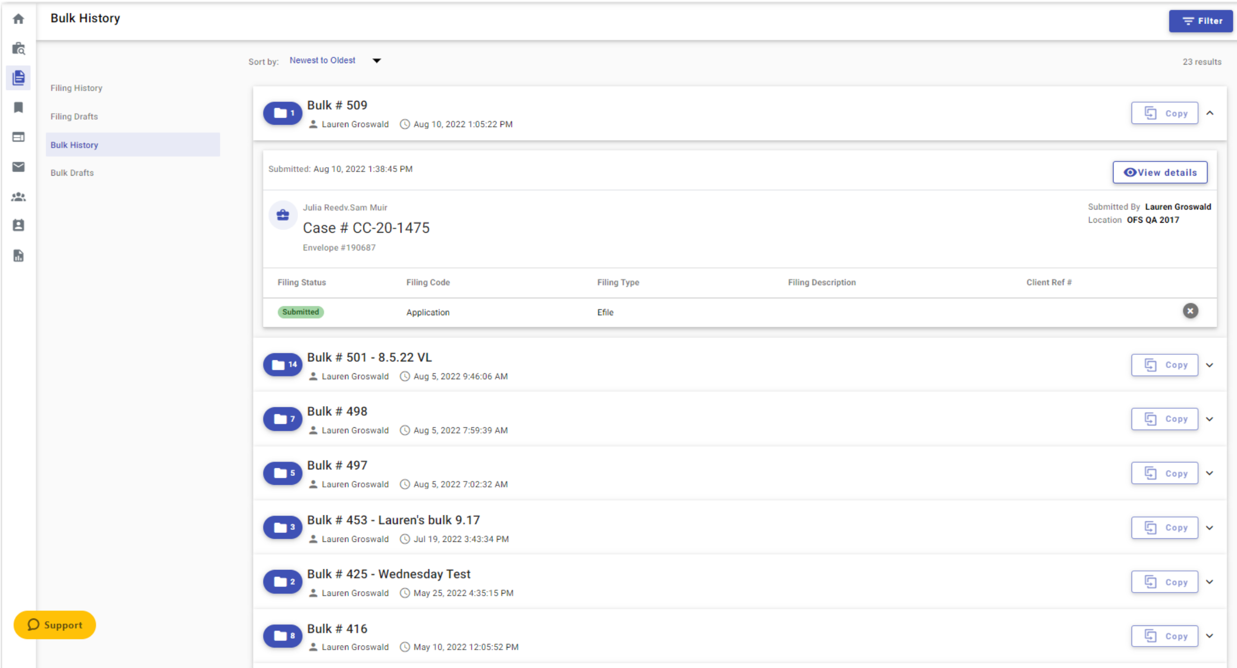



**Figure 18.2 – Example of a Bulk History Page**

# Bulk Drafts

The *Bulk Drafts* page includes the drafts of your bulk filings.

On the Dashboard menu, click **Bulk Drafts**. From here, you can view a list of your bulk filing drafts, resume a bulk filing draft, or delete a bulk filing draft.

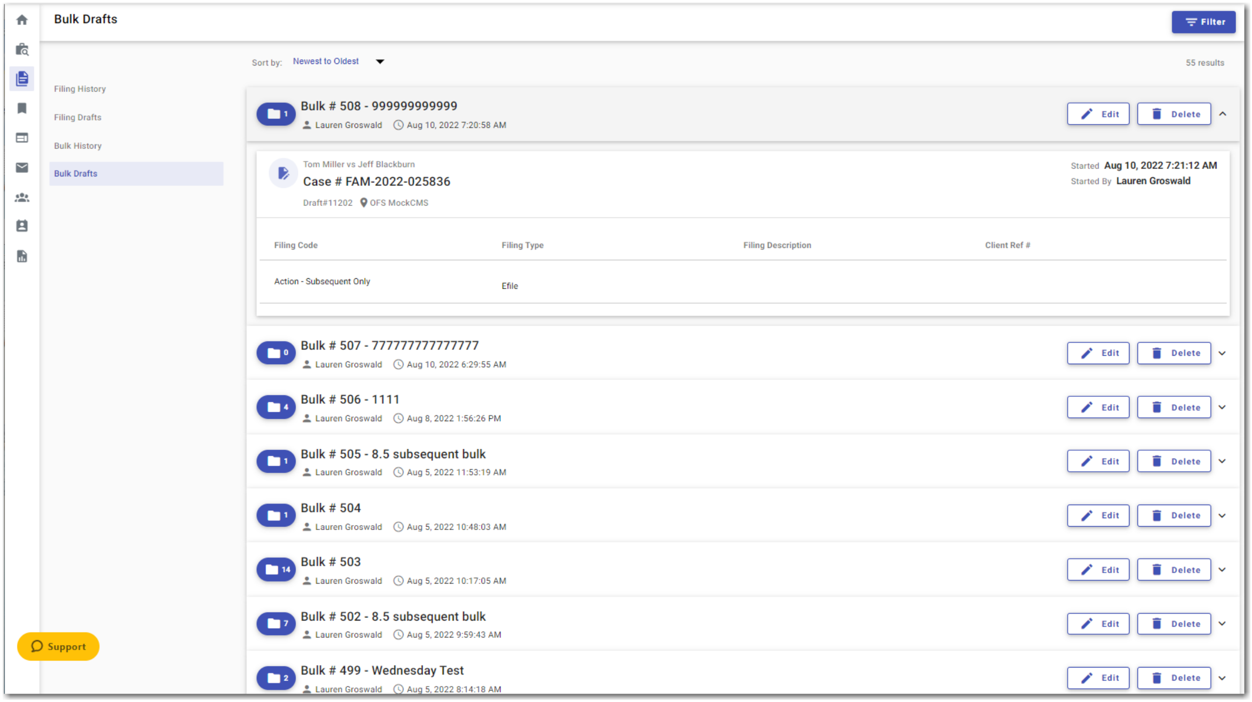


**Figure 18.3 – Example of a Bulk Drafts Page**

# 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.

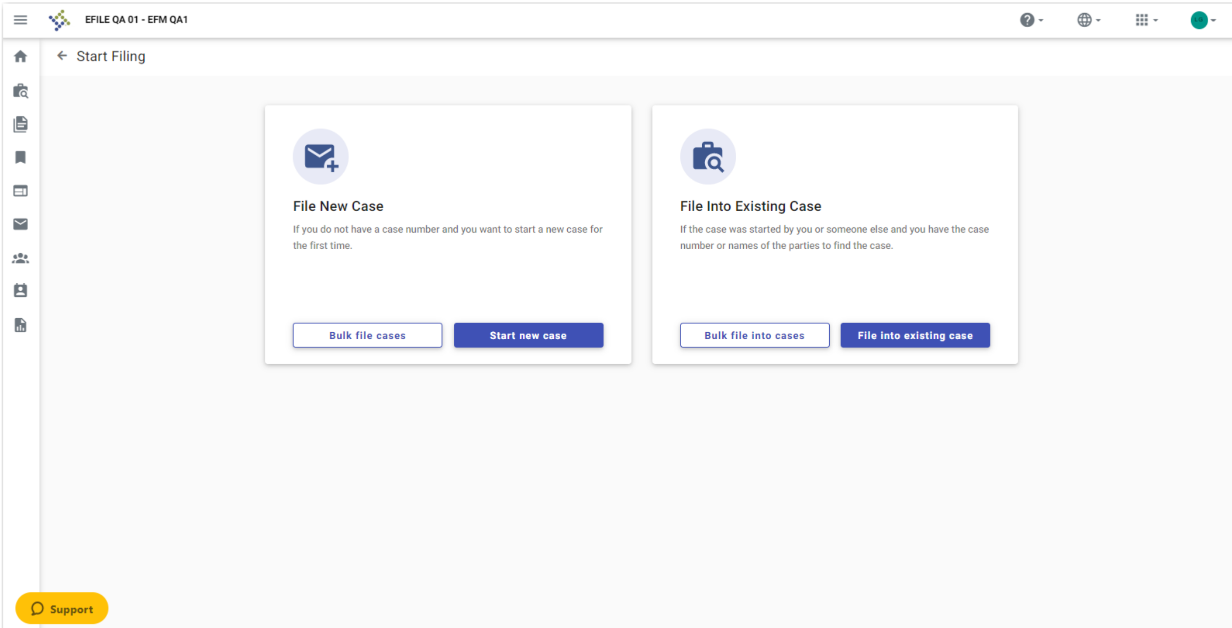



**Figure 18.4 – Start Filing Page**

2. Click **Bulk file cases**.

   The *Bulk Filing* window is displayed.

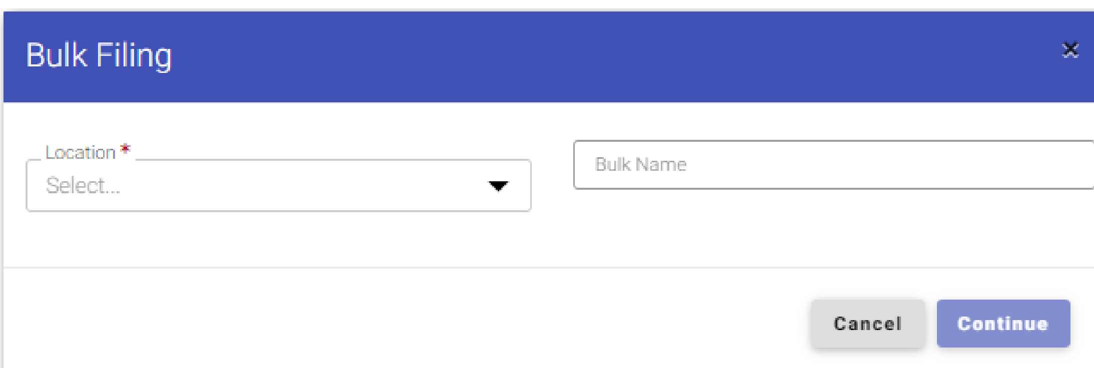



**Figure 18.5 – Bulk Filing Window**

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

4. Type a name for the bulk filing, and then click **Continue**.

   The *Bulk Add Draft* page is displayed.

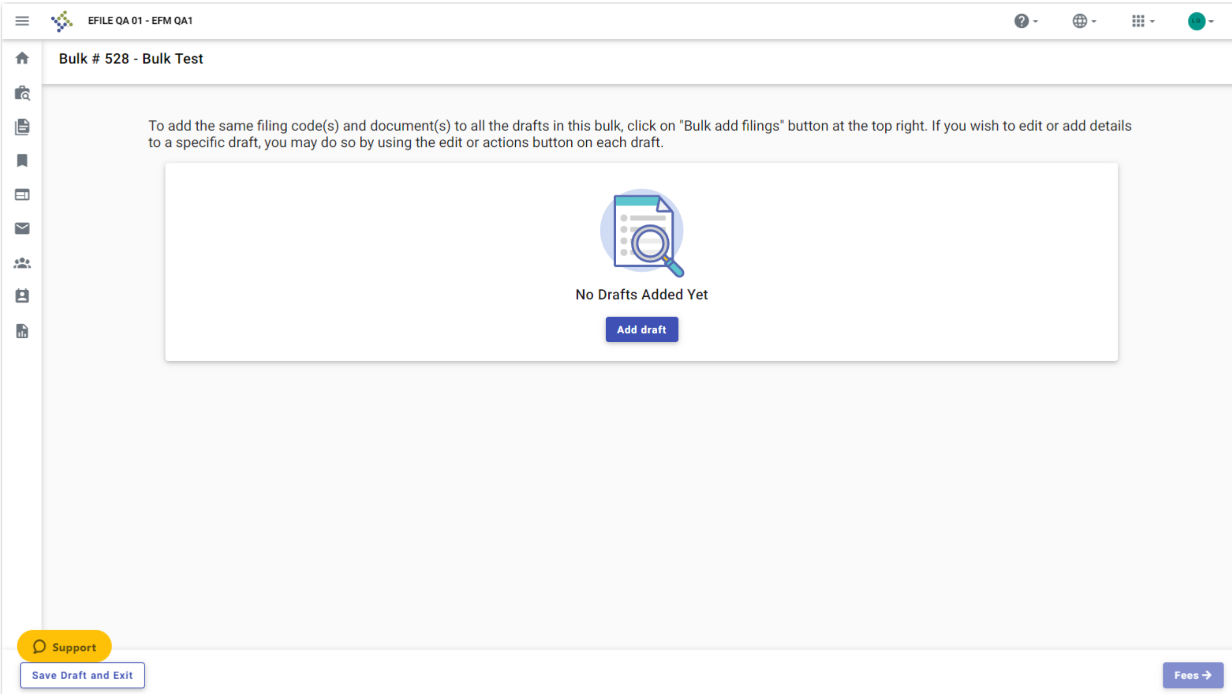



**Figure 18.6 – Example of a Bulk Add Draft Page**

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.

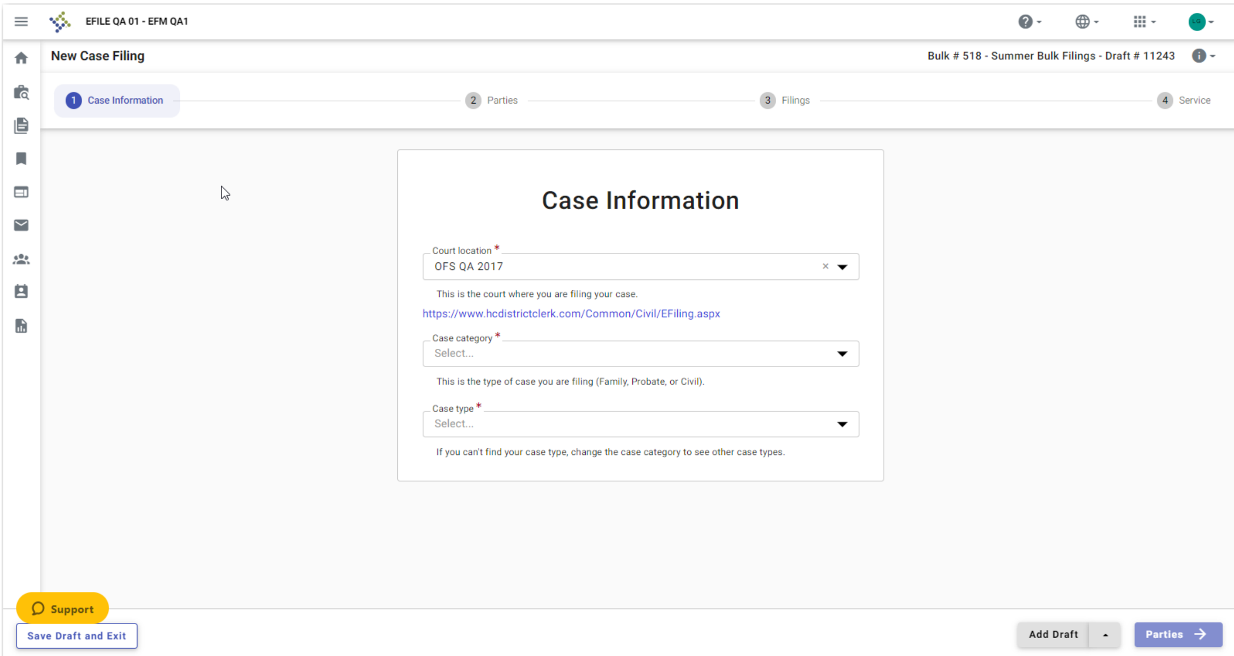



Figure 18.7 – Example of a Case Information Page

**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.

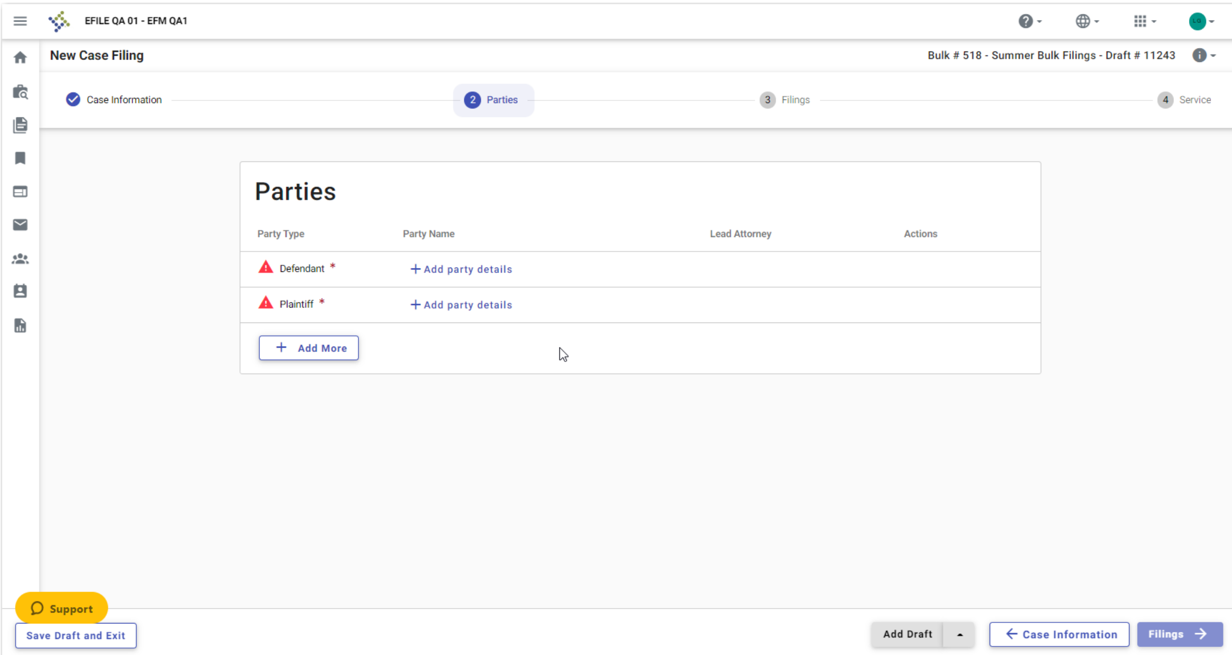



**Figure 18.8 – Example of a Parties Page in a Bulk Filing**

**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.

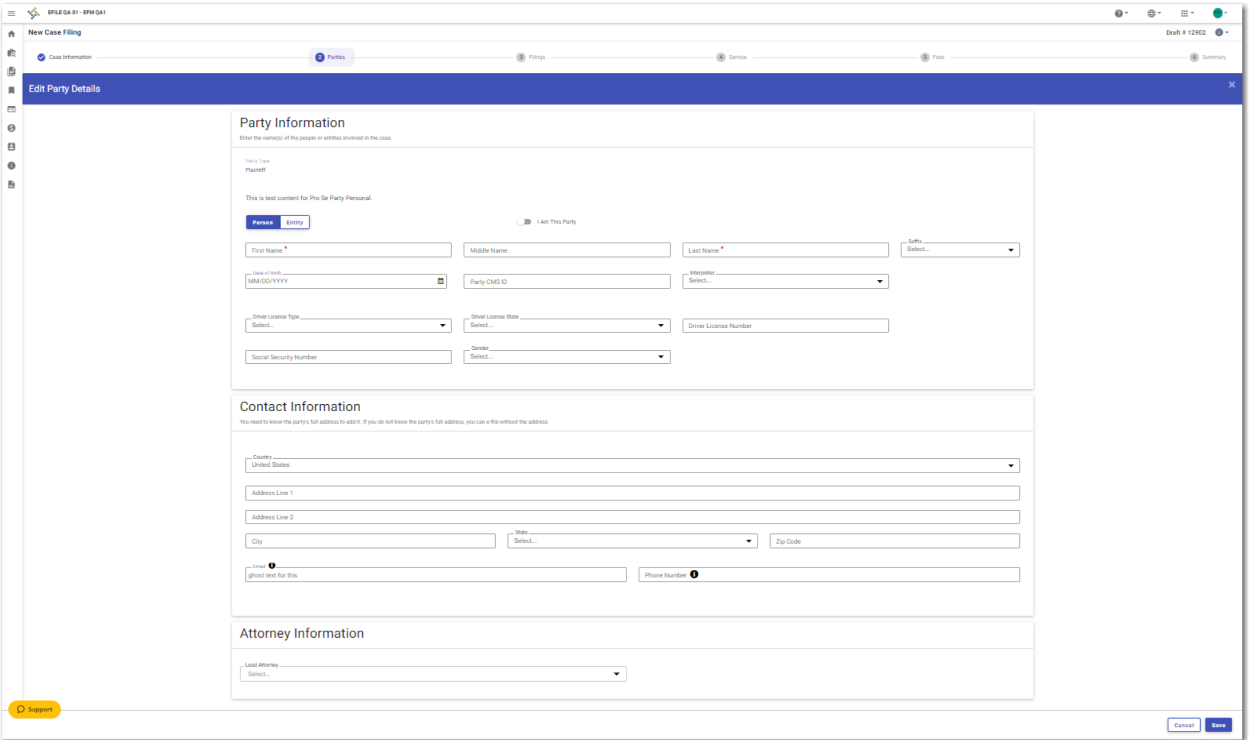



**Figure 18.9 – Example of the Edit Party Details Window**

2. Click either **Person** or **Entity**.

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

3. If you are the first party, select **I Am This Party**.
4. 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.
5. Type the party's date of birth in the **Date of Birth** field, or click  to select the date from the calendar.
6. Type the party case management system ID in the **Party CMS ID** field, if appropriate.
7. Select a language from the **Interpreter** drop-down list, if appropriate.
8. Select the type of driver's license from the **Drivers License Type** drop-down list.
9. Select the state where the driver's license was issued from the **Drivers License State** drop-down list.
10. Type the party's driver's license number in the **Drivers License Number** field.
11. 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.**

12. Select the party's gender from the **Gender** 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 **Pro Se** for the filing attorney.

15. After all of the required fields for the specified party are completed, click **Save**.
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 **+ Add More**, 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 **Filings →** to save your work and to continue.

# Entering Filing Details for a Bulk Filing

The **Filings** section allows you to enter the details for a bulk filing.

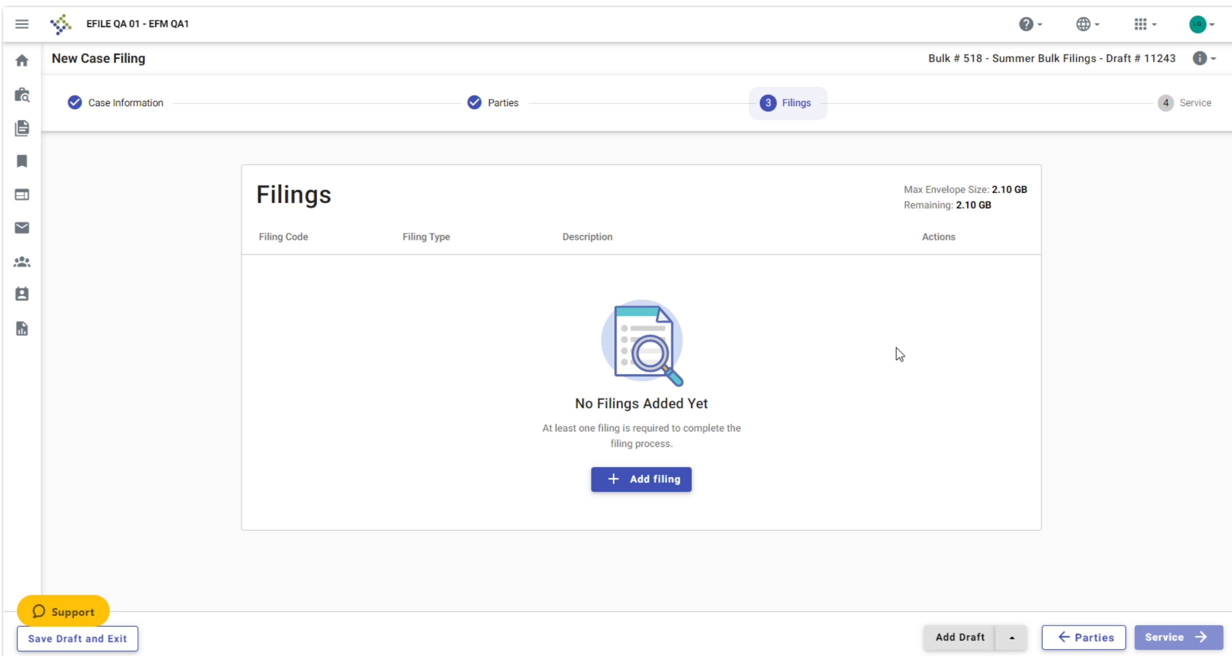


Figure 18.10 – Example of a Filings Page

**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 **+ Add filing**.

   The *Edit Filing Details* page is displayed.

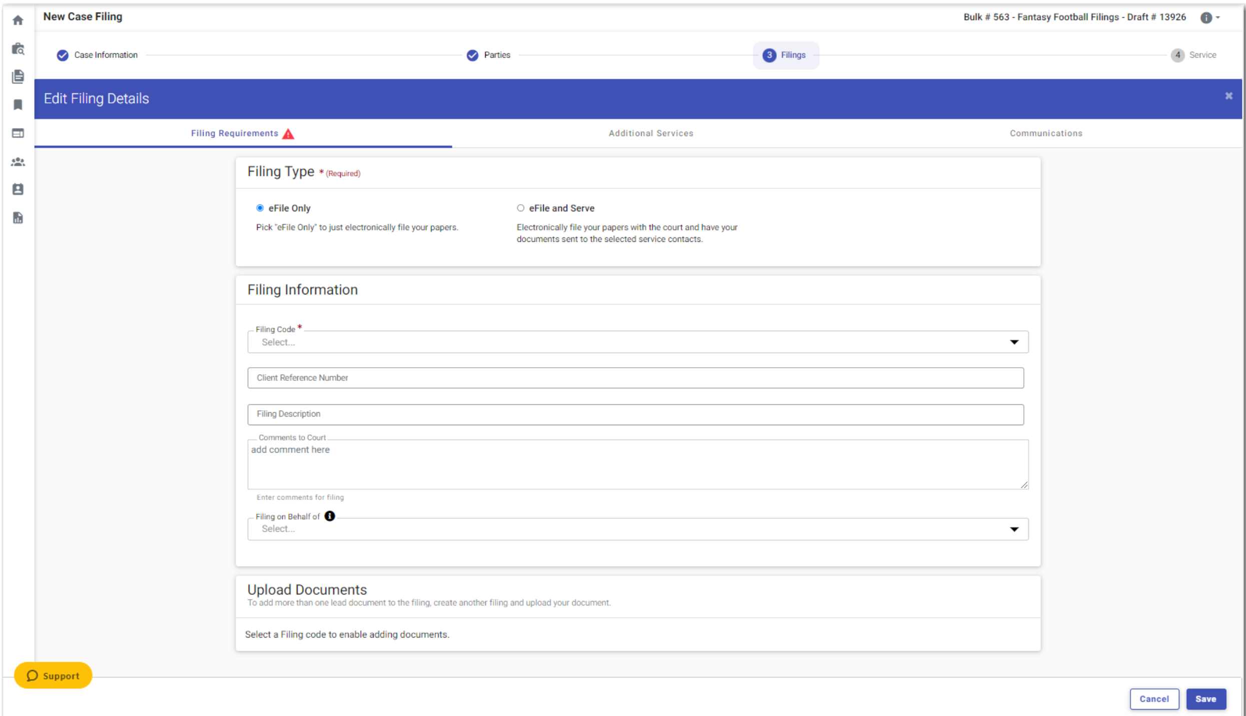
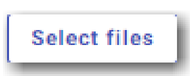



**Figure 18.11 – Example of an Edit Filing Details Page**

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."**

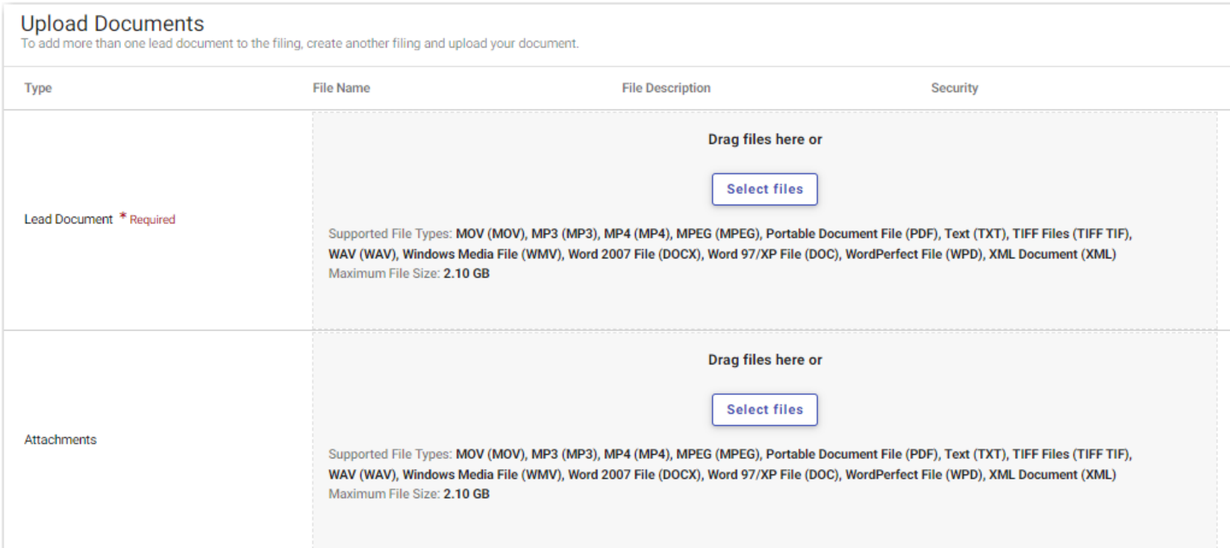



**Figure 18.12 – Upload Documents Pane**

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.

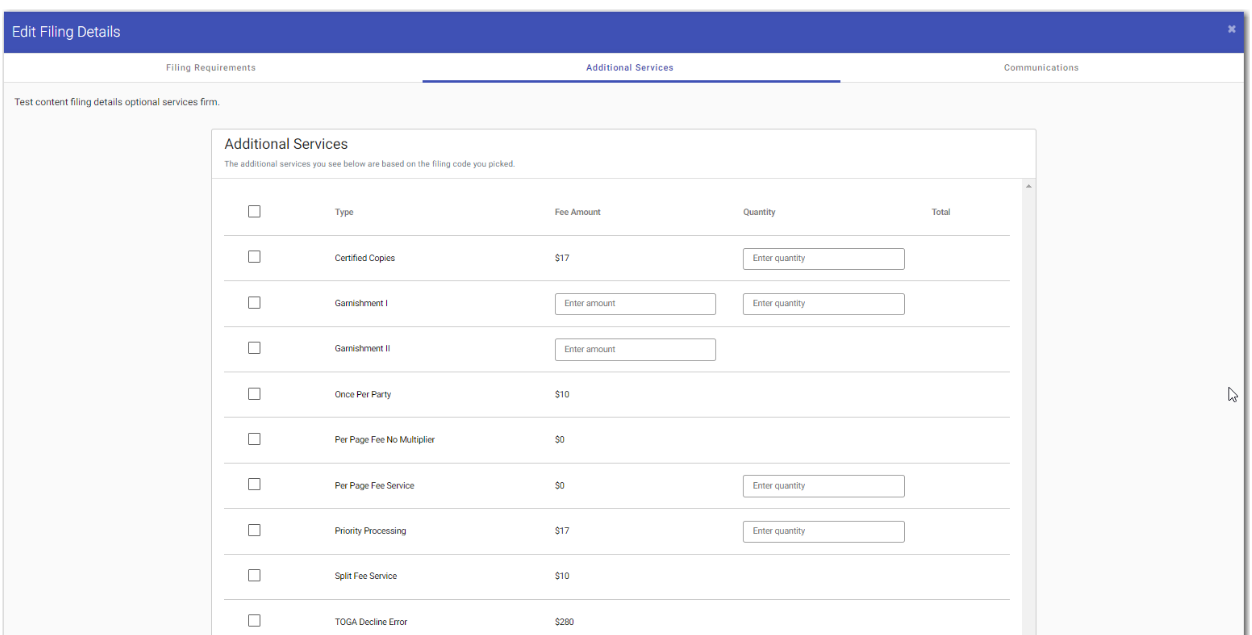



**Figure 18.13 – Additional Services Pane on the Edit Filing Details Page**

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.

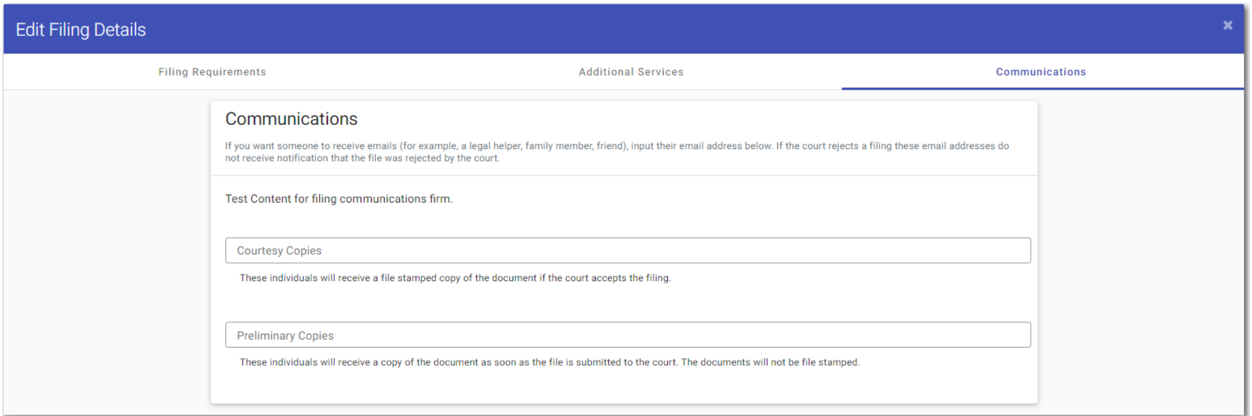



**Figure 18.14 – Communications Pane on the Edit Filing Details Page**

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.**

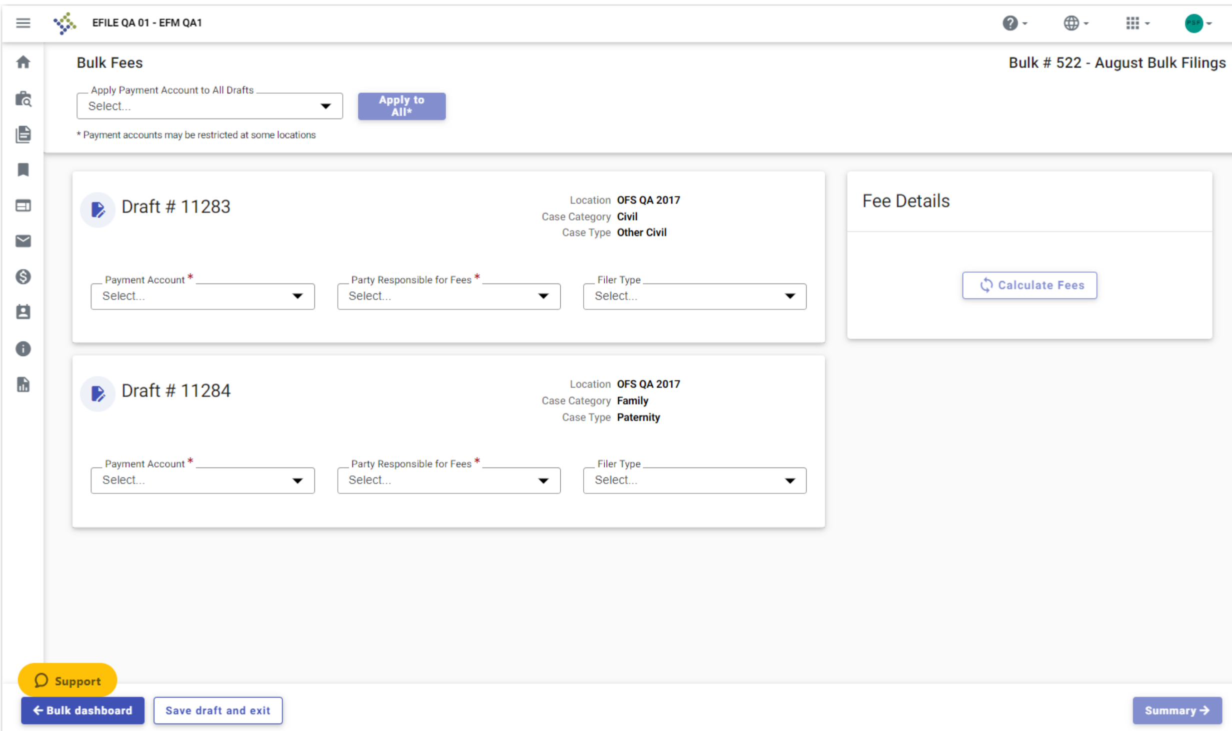



**Figure 18.15 – Example of a Bulk Fees Page—Blank Fields**

**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:

1. Select the payment account from the **Apply Payment Account to All Drafts** drop-down list. Then, click **Apply to All*** to apply the selected payment account to all of the drafts in the bulk.

   **Note: If you do not want to apply the same payment account to all of the drafts in the bulk, you must select the payment account for each individual draft.**

2. 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.**

3. For each draft, select the filer type from the **Filer Type** drop-down list.

4. When all of the fields on the page have been completed, click **Calculate Fees**.

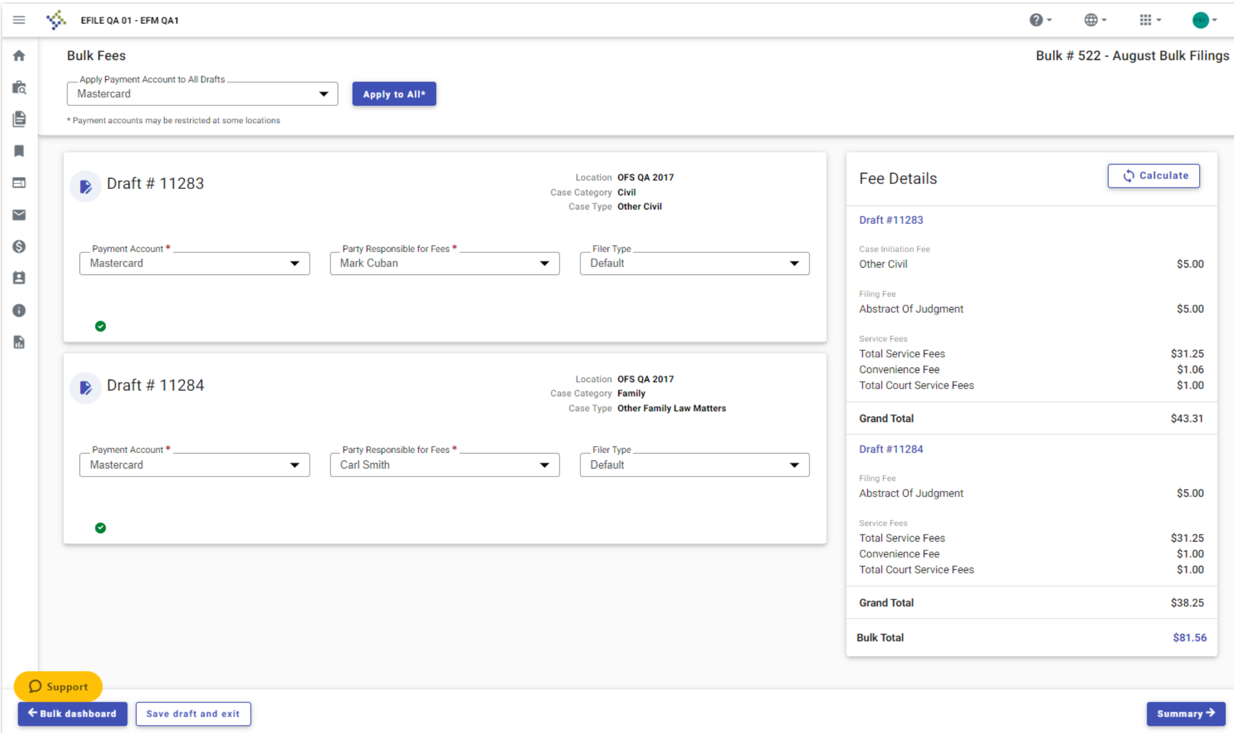



**Figure 18.16 – Example of a Bulk Fees Page with all Fields Completed**

5. Review the filing fees, and then 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.

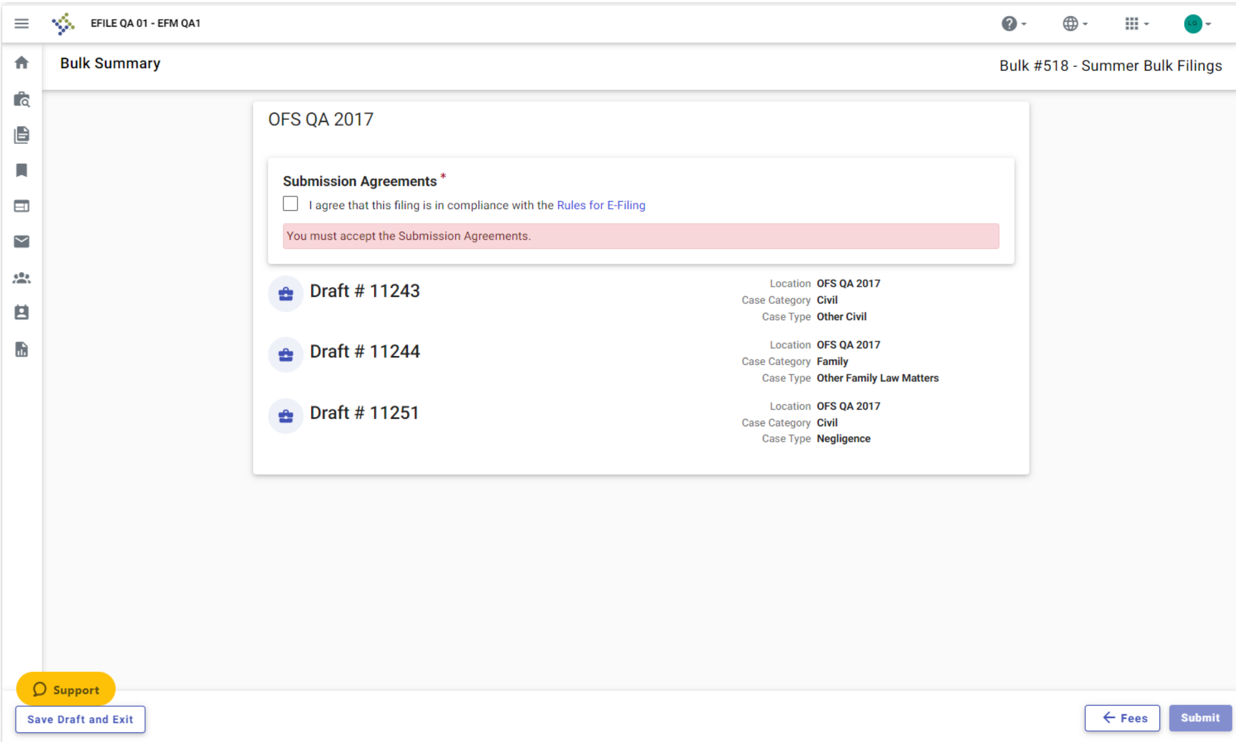



Figure 18.17 – Example of a Bulk Summary Page—Submission Agreements Not Accepted

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 

.

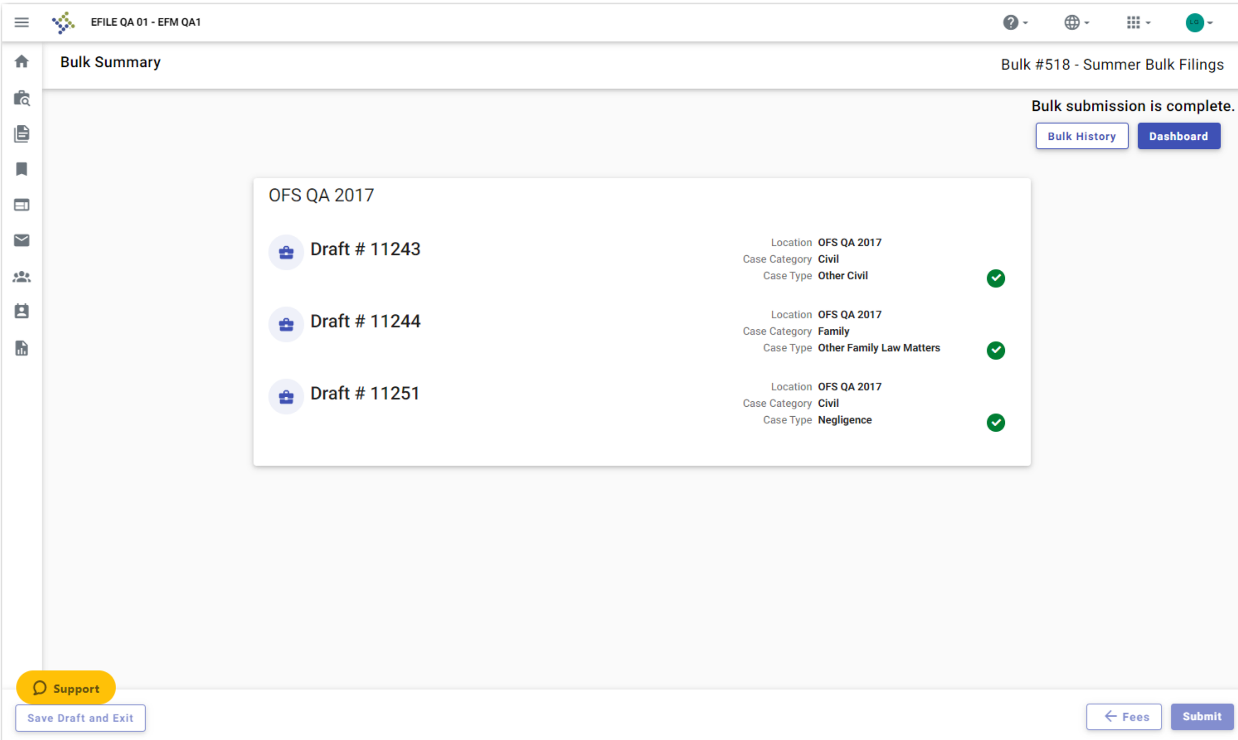



**Figure 18.18 – Example of a Bulk Summary Page After Filing is Submitted**

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.**

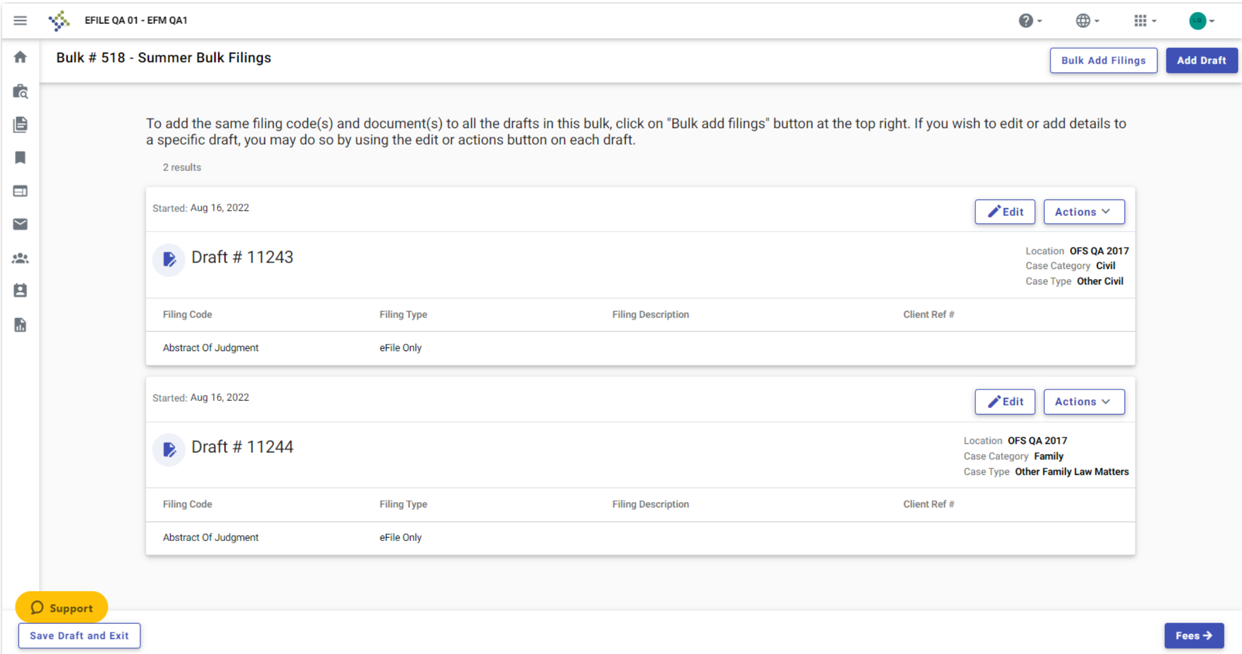



**Figure 18.19 – Example of a Bulk Filing Dashboard Page**

To associate parties to a bulk filing:

1. On the *Bulk Filing Dashboard* page, click **Add Draft**.

   The **Drafts** tab is displayed.

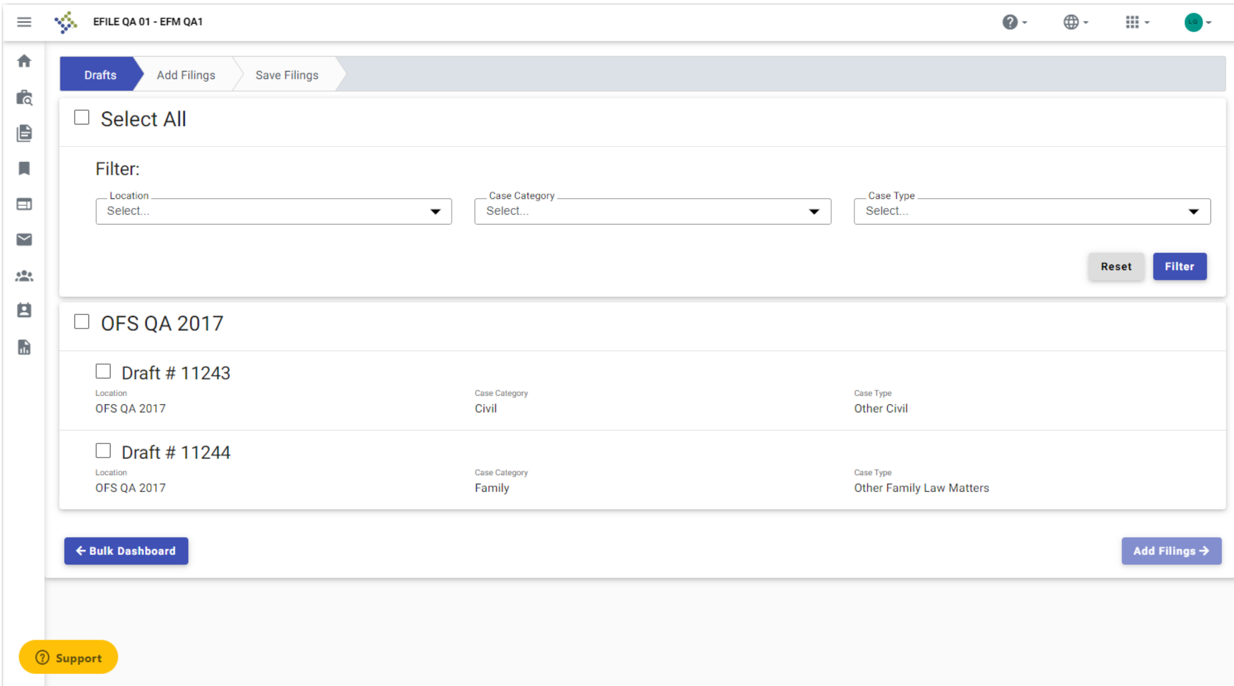



**Figure 18.20 – Example of a Drafts Tab**

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.

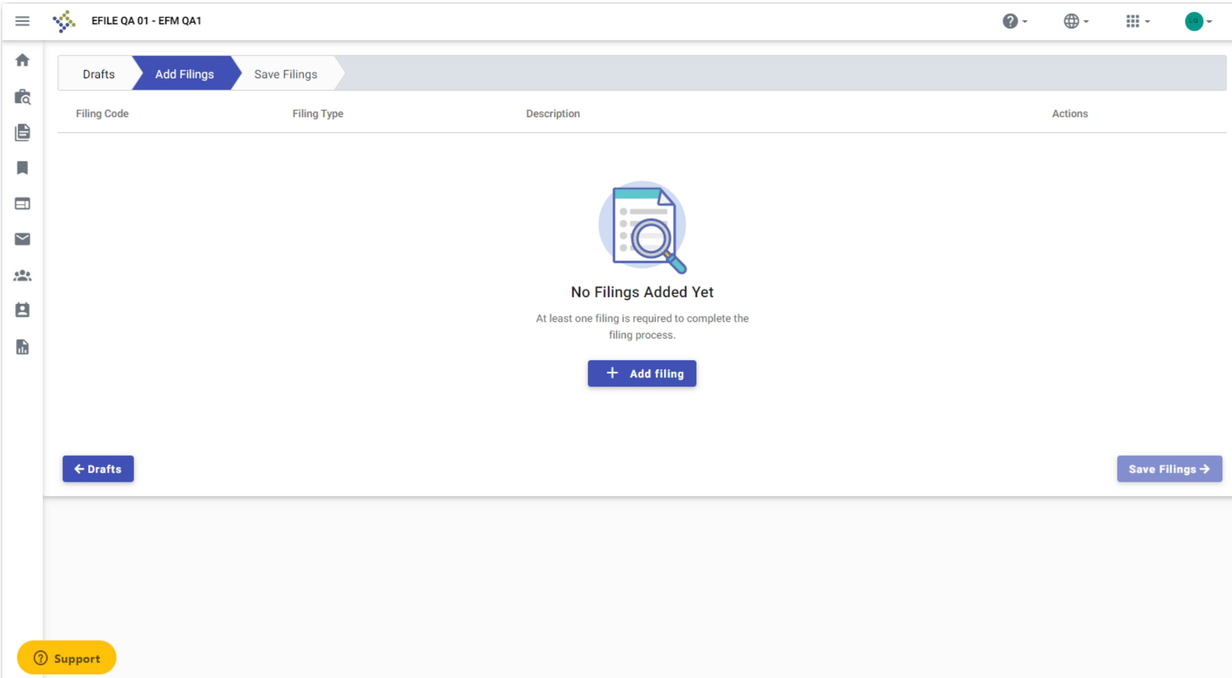


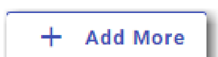

Figure 18.21 – Example of an Add Filings Tab—No Filings Added Yet

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.

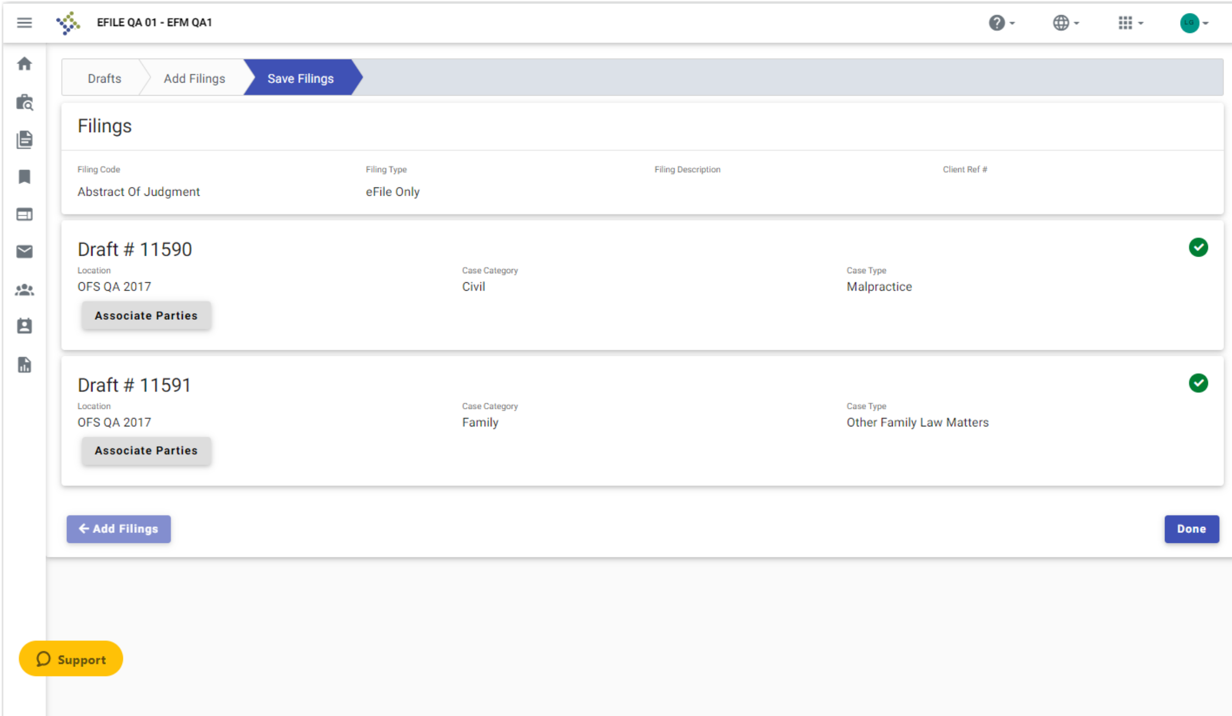



**Figure 18.22 – Example of a Save Filings Tab**

10. Click 

.

The Select Filings window is displayed.

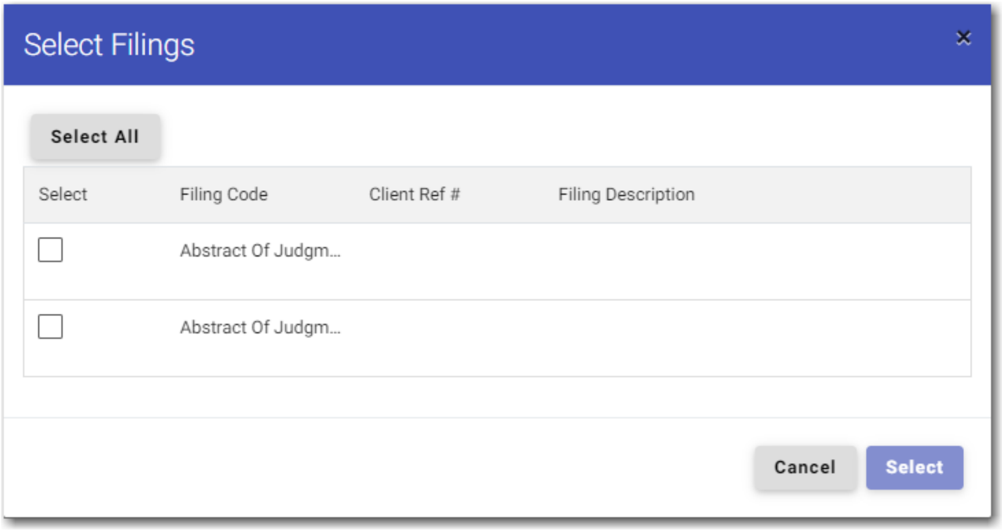



**Figure 18.23 – Example of a Select Filings Window**

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.

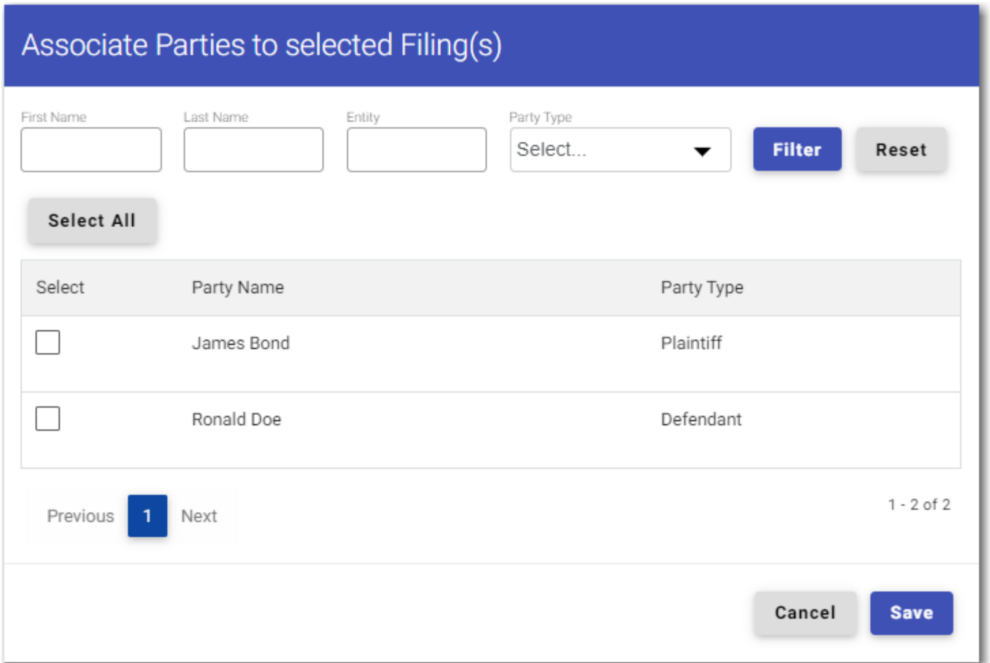



**Figure 18.24 – Example of the Associate Parties to Selected Filing(s) Window**

> **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 Filter.**

12. Select the check box for each filing that you want to associate with the added party, or click **Select All**.

13. Click **Save**, and then click **Done** 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 **Start filing**.

   The *Start Filing* page is displayed.

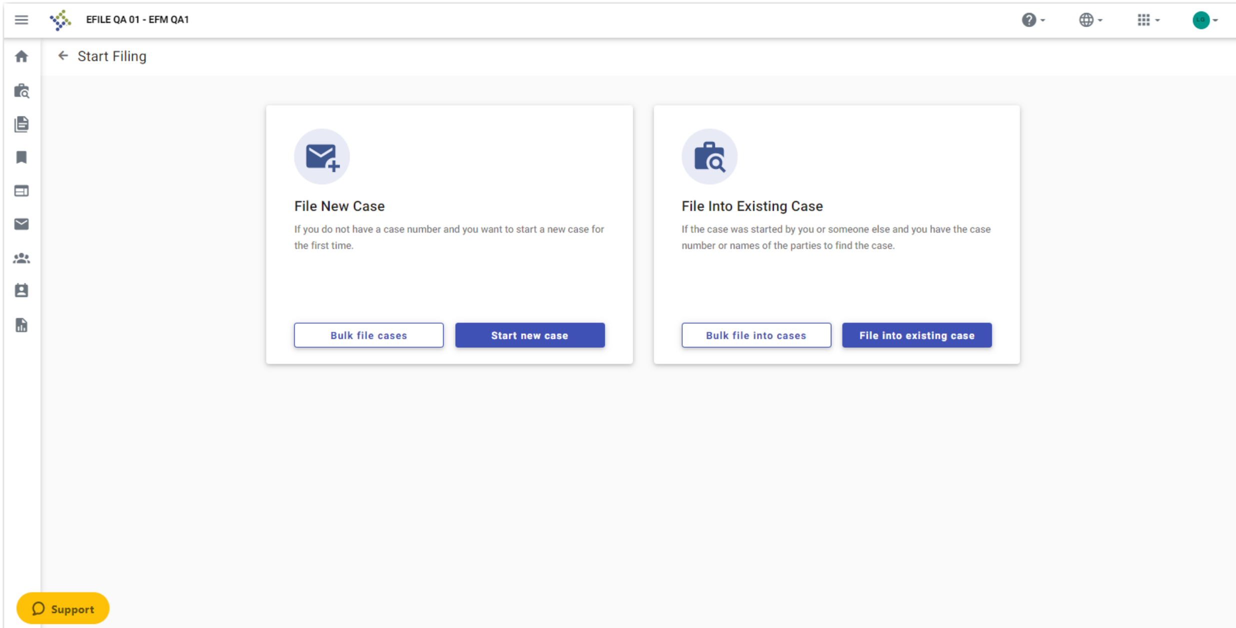



**Figure 18.25 – Start Filing Page**

2. Click 

.

   The *Bulk Filing* window is displayed.

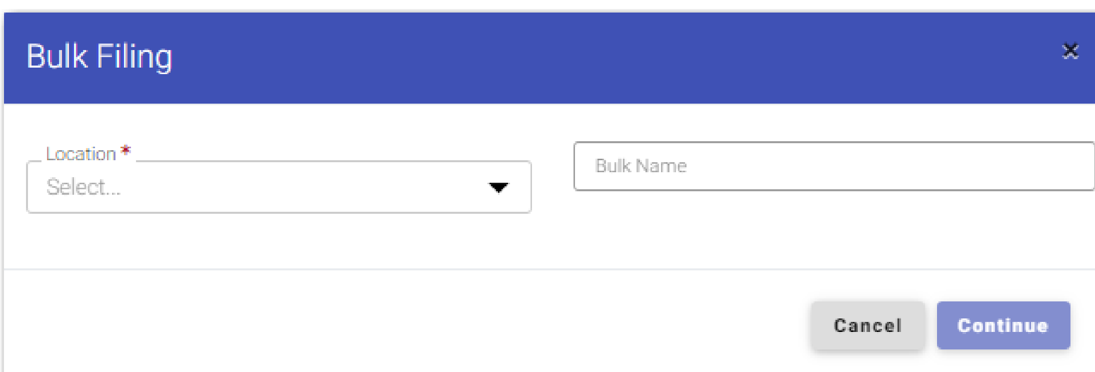



**Figure 18.26 – Bulk Filing Window**

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.

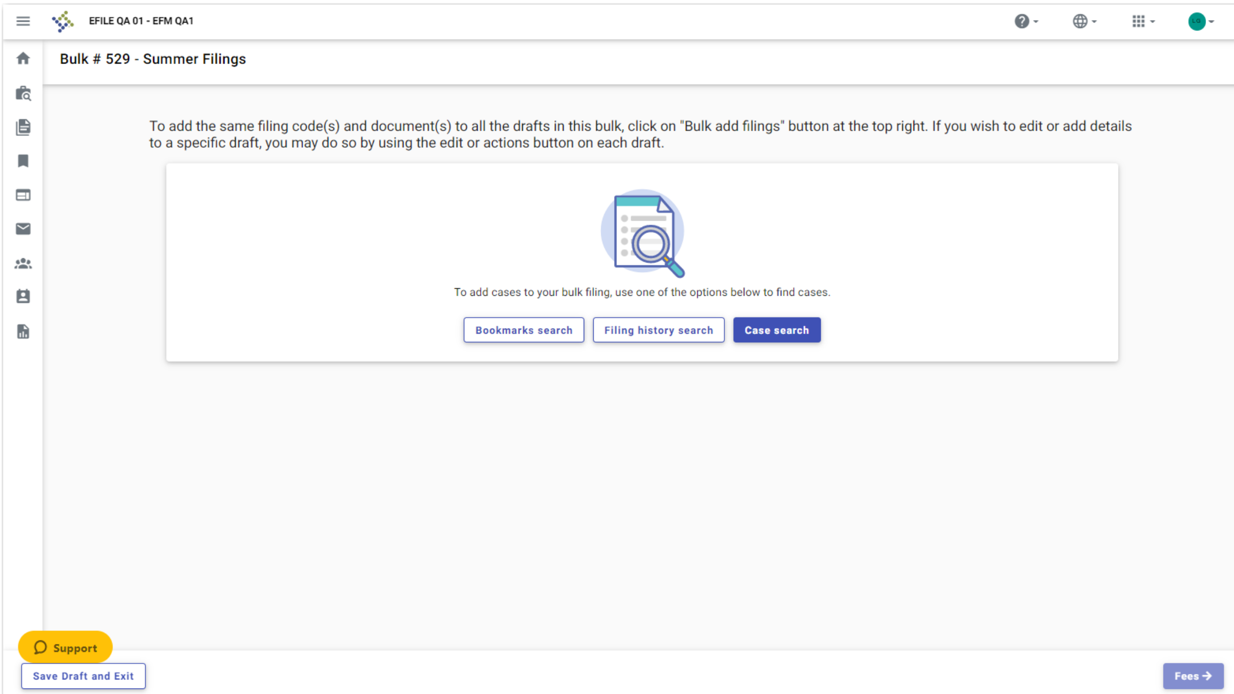



**Figure 18.27 – Example of a File into Multiple Cases Page**

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.

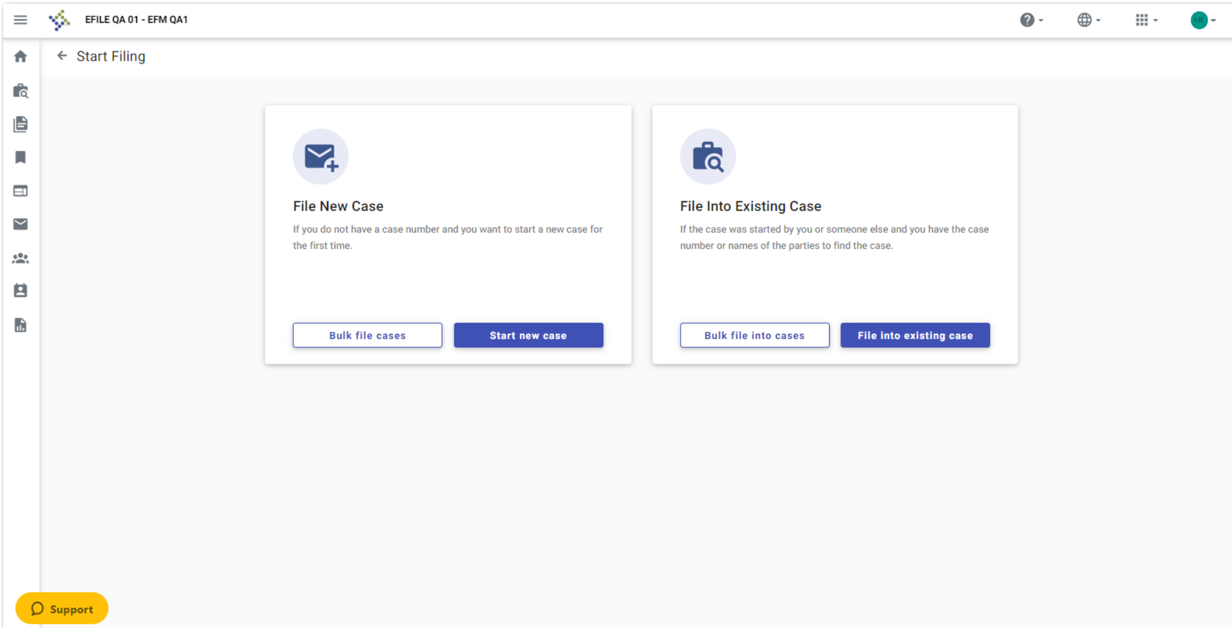



**Figure 18.28 – Start Filing Page**

2. Click **Bulk file into cases**.

   The *Bulk Filing* window is displayed.

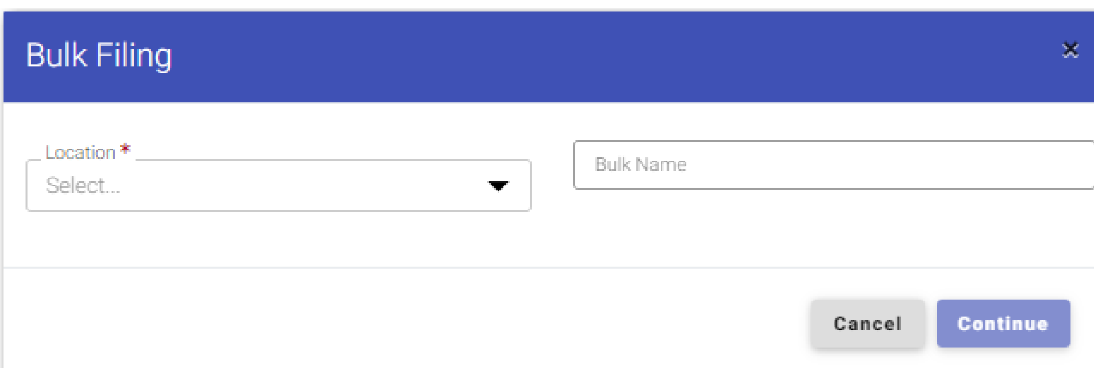



**Figure 18.29 – Bulk Filing Window**

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 **Continue**.

   The *File into Multiple Cases* page is displayed.

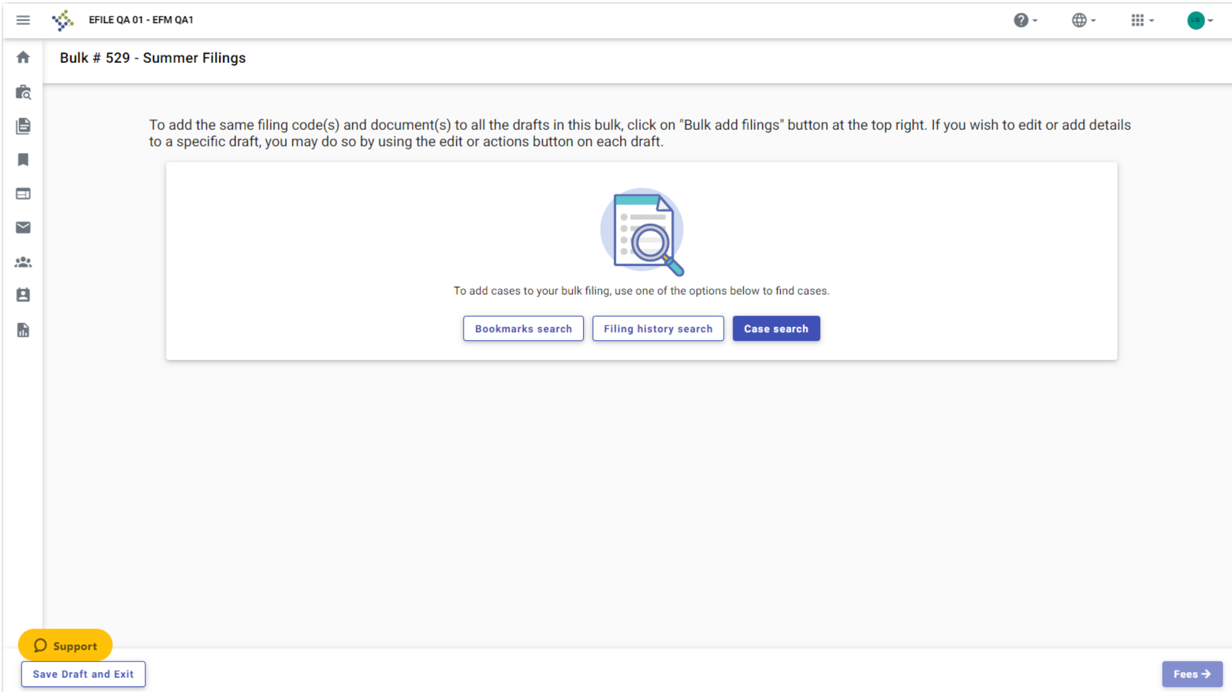



**Figure 18.30 – Example of a File into Multiple Cases Page**

5. Click 

.

   The *Bookmarks* page is displayed. If previous bulk filings were bookmarked, they are displayed on the page.

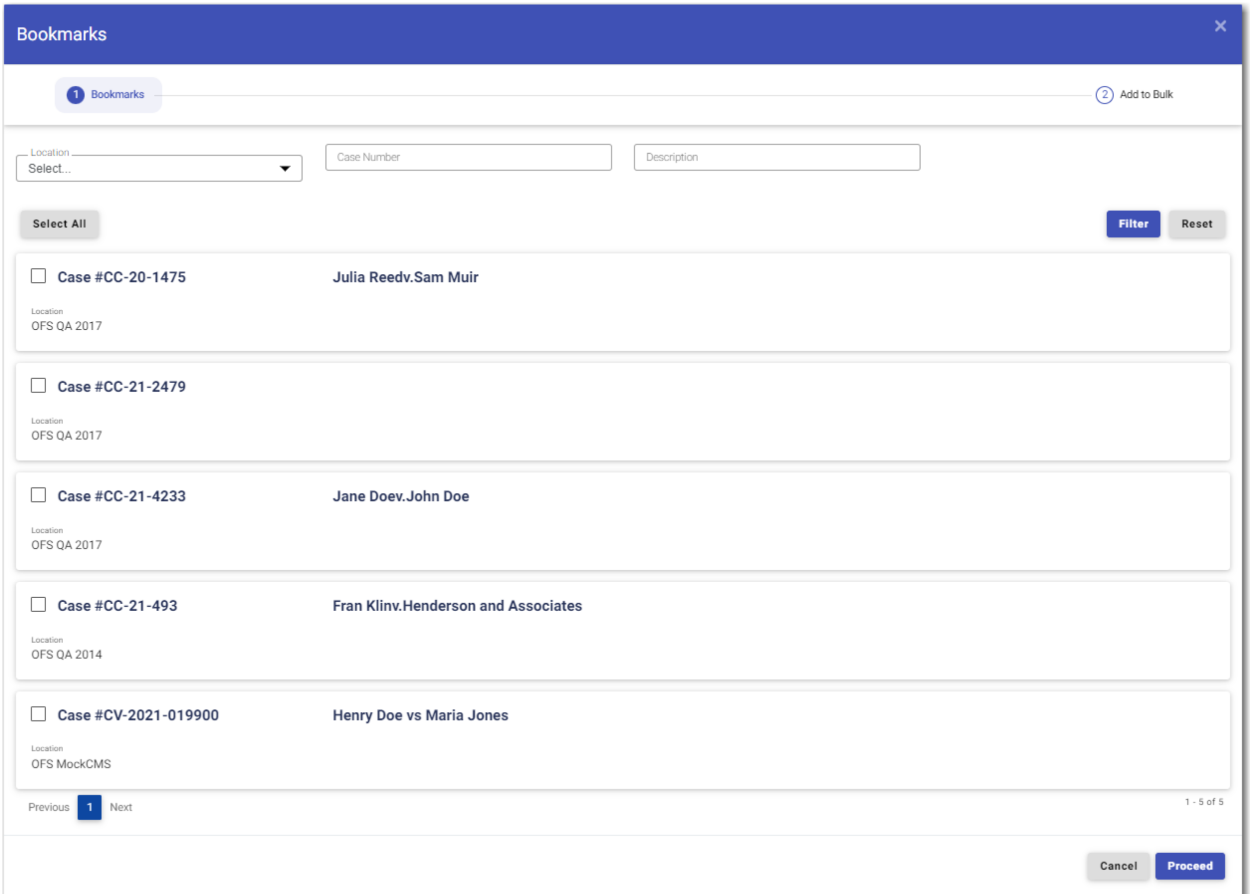



**Figure 18.31 – Example of a Bookmarks Page**

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 *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 Filter.**

   The *Add to Bulk* window is displayed.

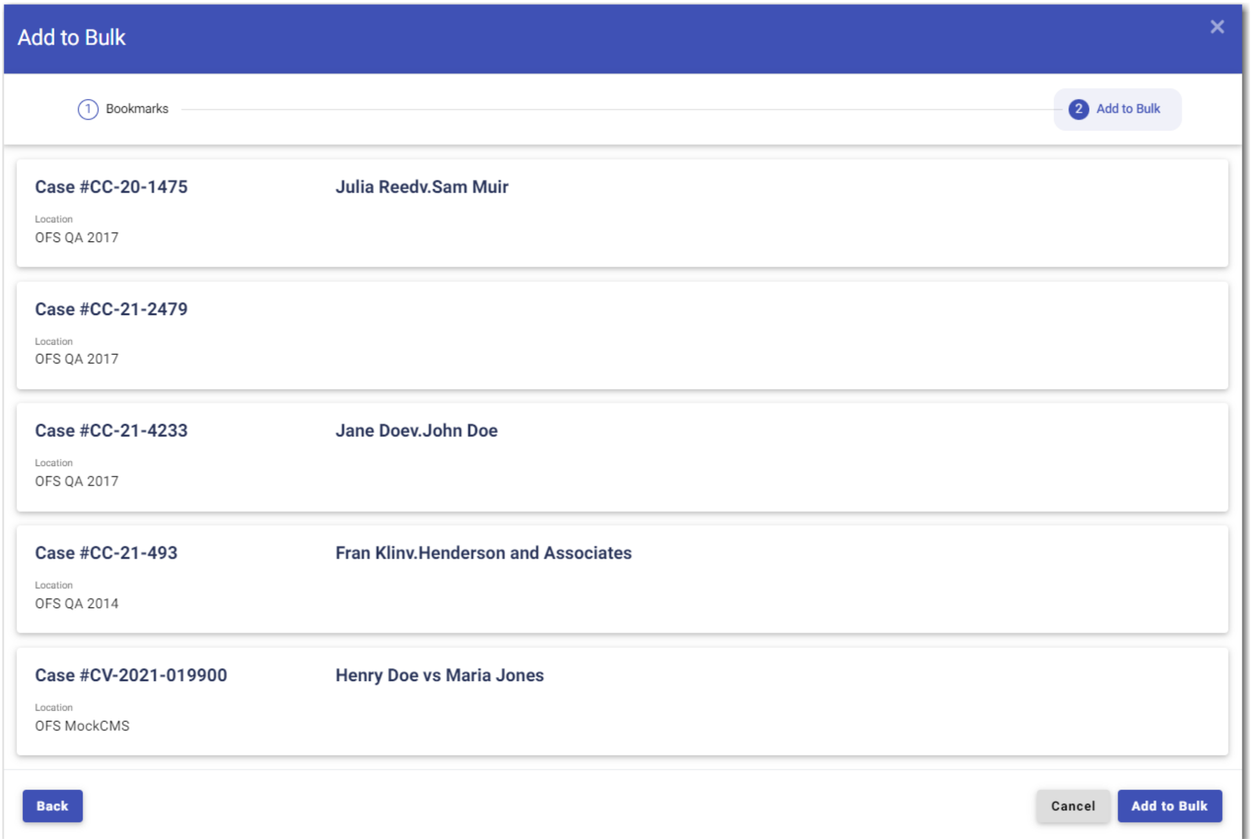



**Figure 18.32 – Example of an Add to Bulk Window**

7. 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.

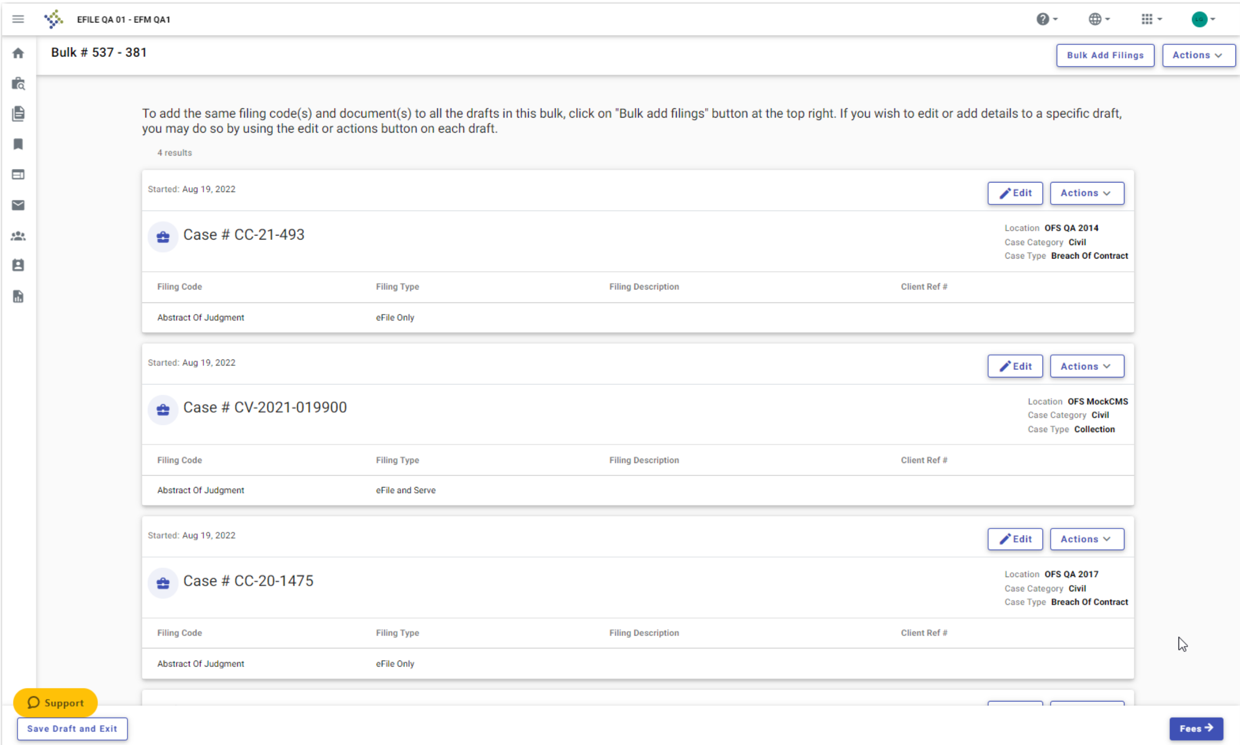



**Figure 18.33 – Example of a Bulk Filing Dashboard Page with Additional Cases Added**

# 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.

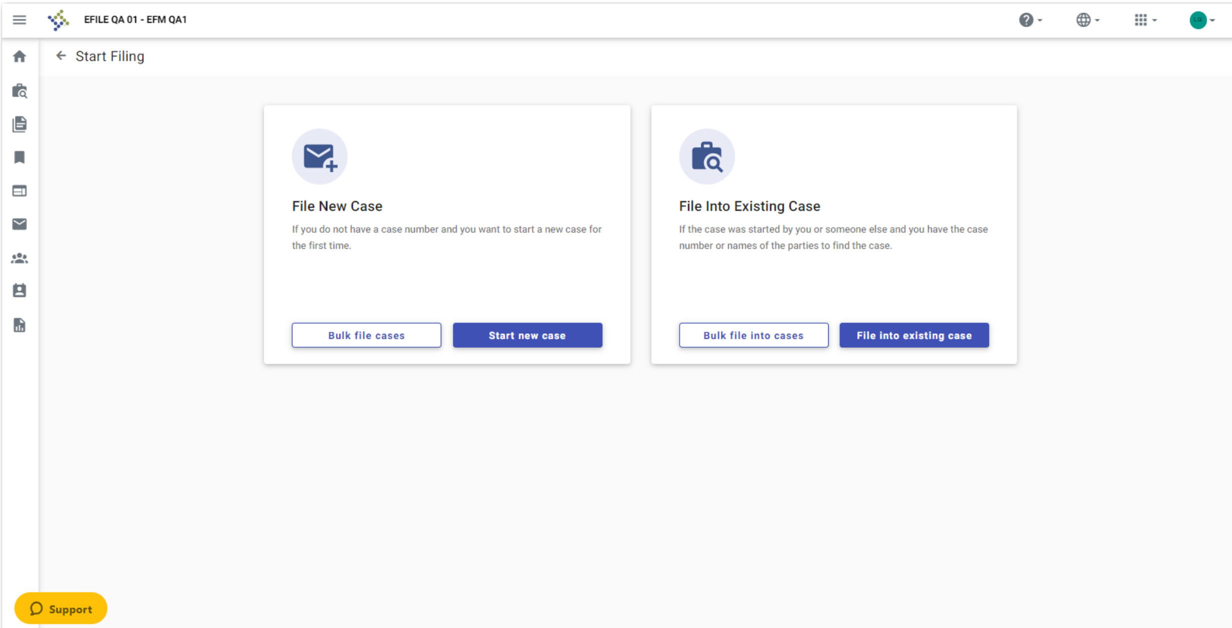



Figure 18.34 – Start Filing Page

2. Click 

.

   The *Bulk Filing* window is displayed.

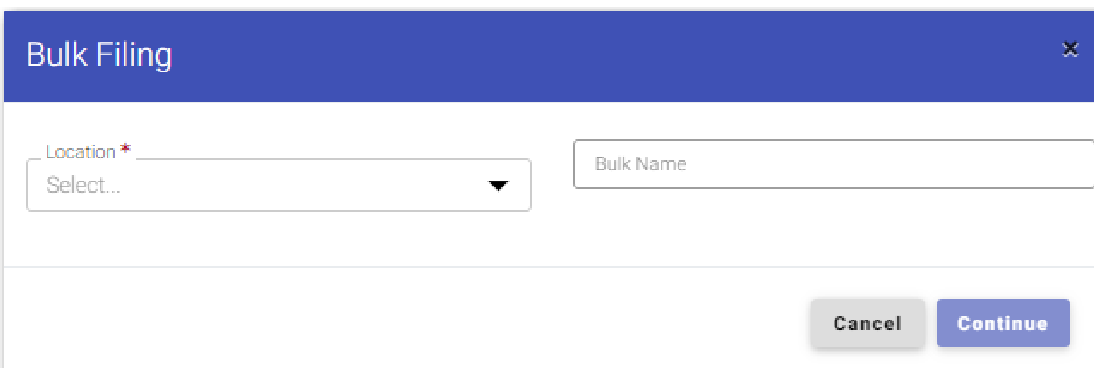



Figure 18.35 – Bulk Filing Window

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.

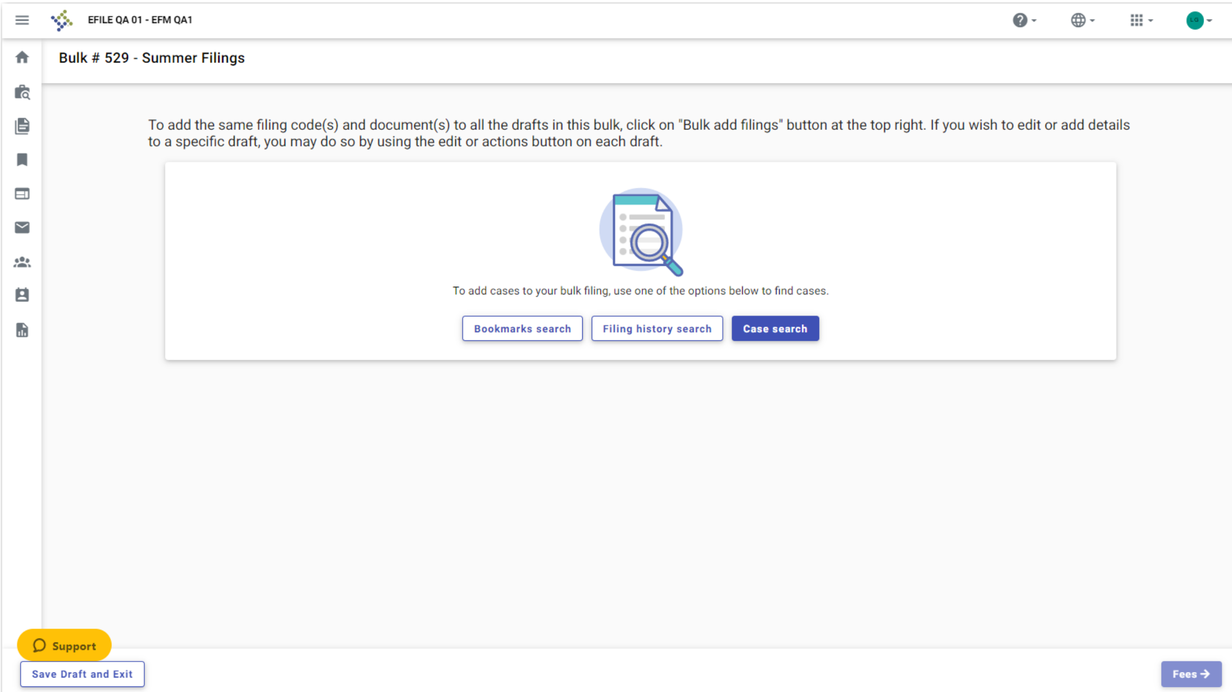
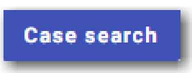



**Figure 18.36 – Example of a Bulk Filing Dashboard Page**

5. Click 

.

   The *Search for Case* page is displayed.

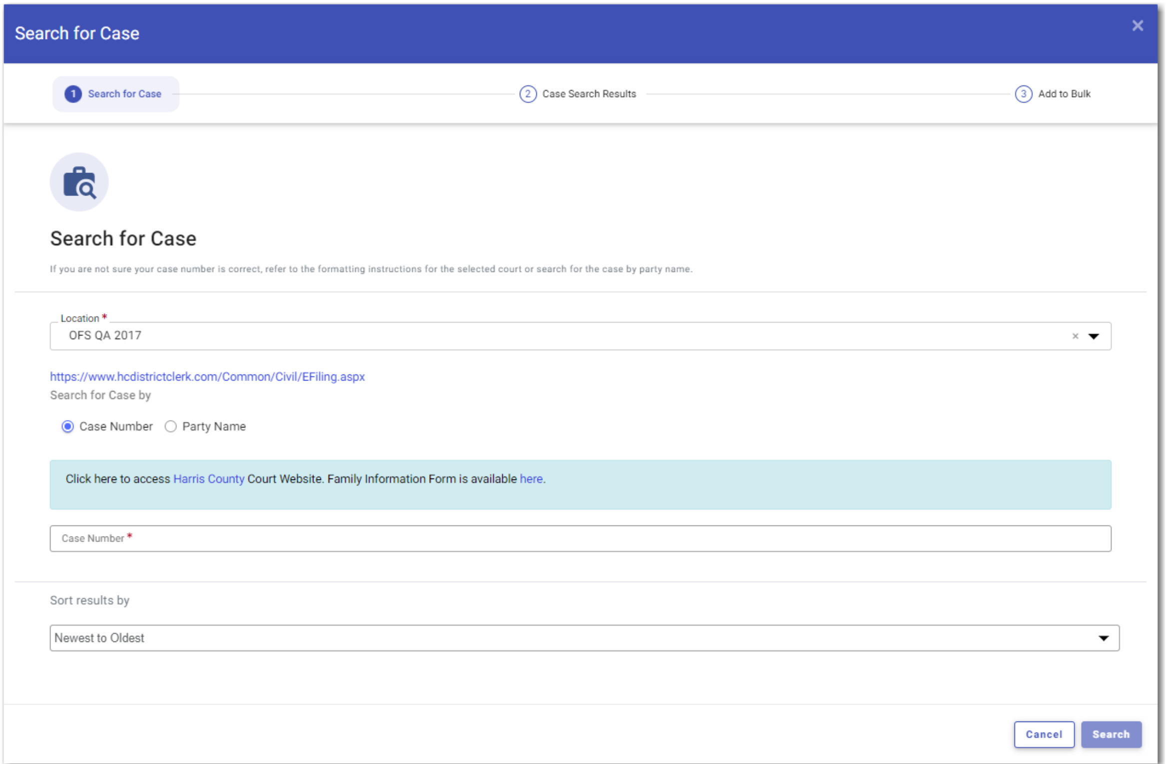



**Figure 18.37 – Search for Case Page**

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.

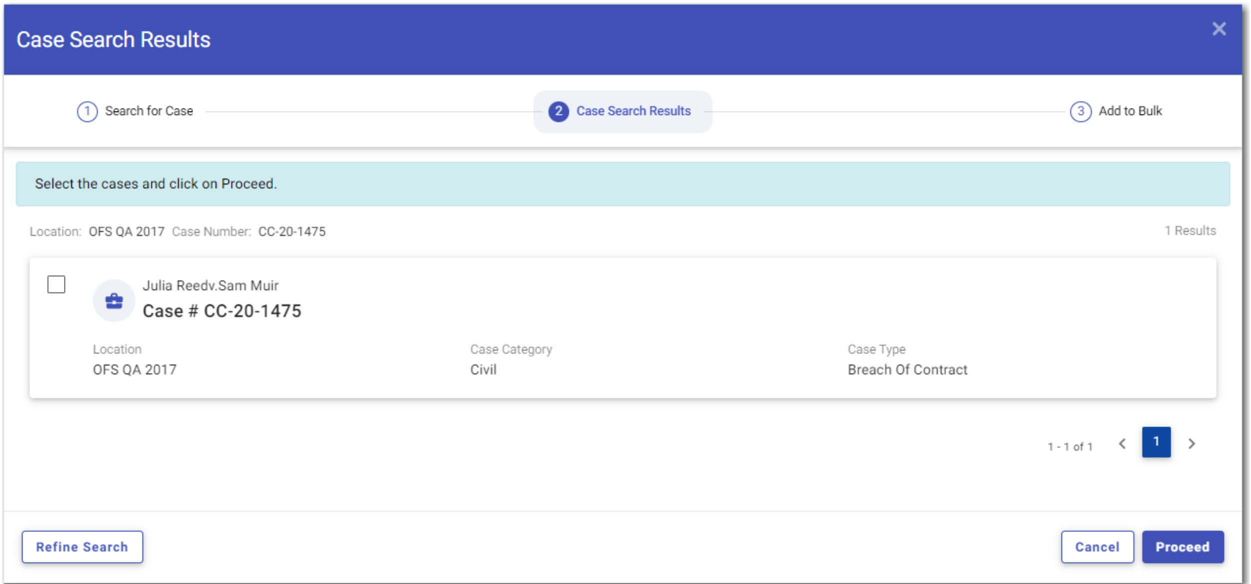



**Figure 18.38 – Example of a Case Search Results Window**

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.

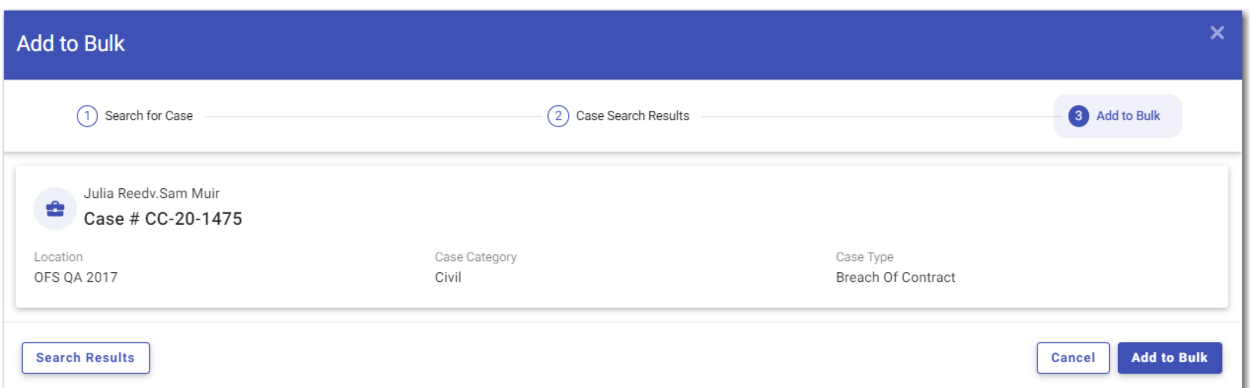



**Figure 18.39 – Add to Bulk Window**

**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**, and then click **Done**.

   The case you selected is added to the bulk filing and is displayed on the *Bulk Filing Dashboard* page.

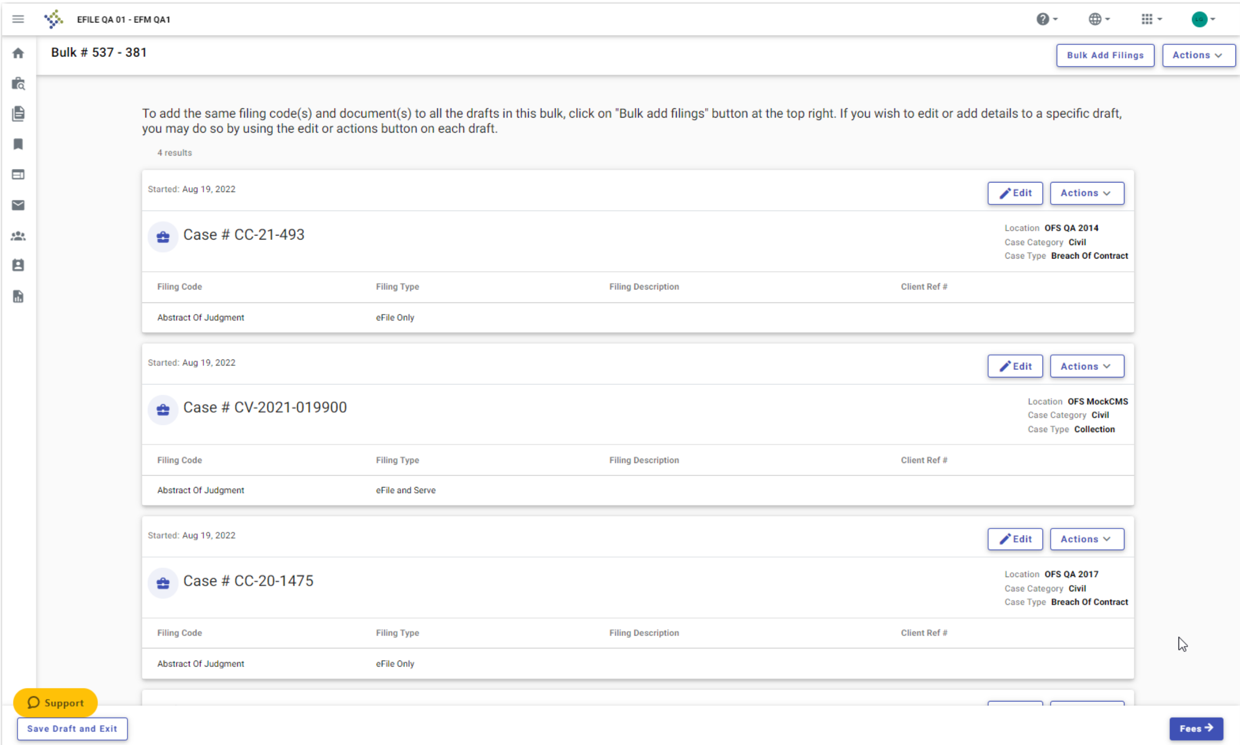


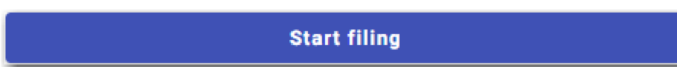

**Figure 18.40 – Example of a Bulk Filing Dashboard Page with Additional Cases Added**

# 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.

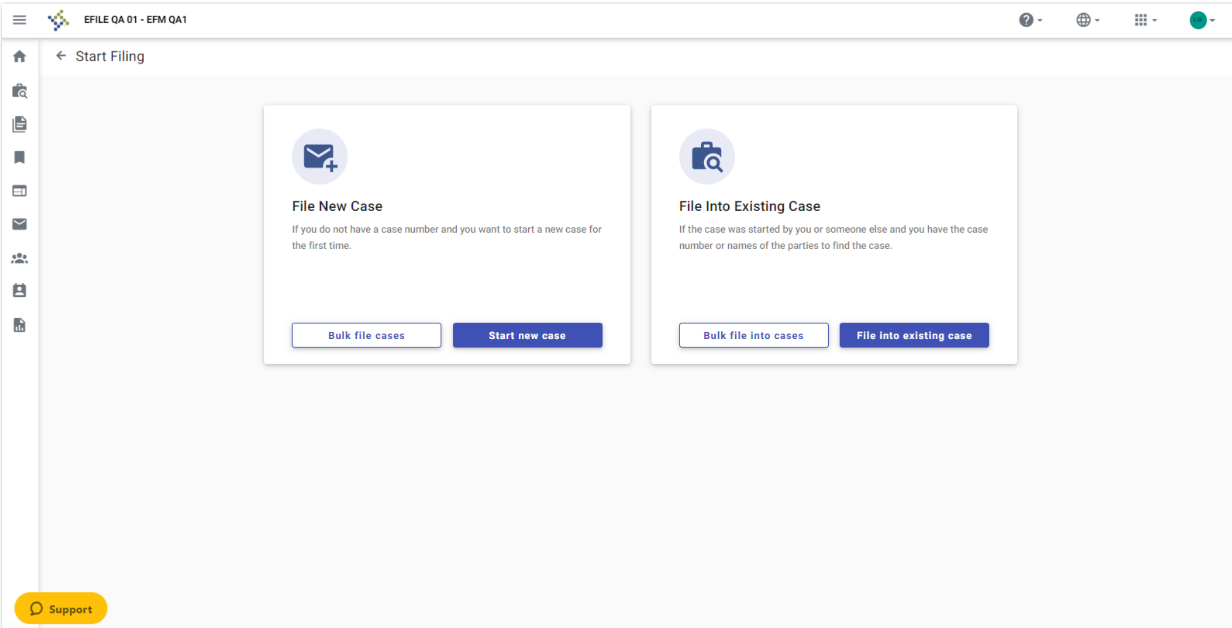



**Figure 18.41 – Start Filing Page**

2. Click 

.

   The *Bulk Filing* window is displayed.

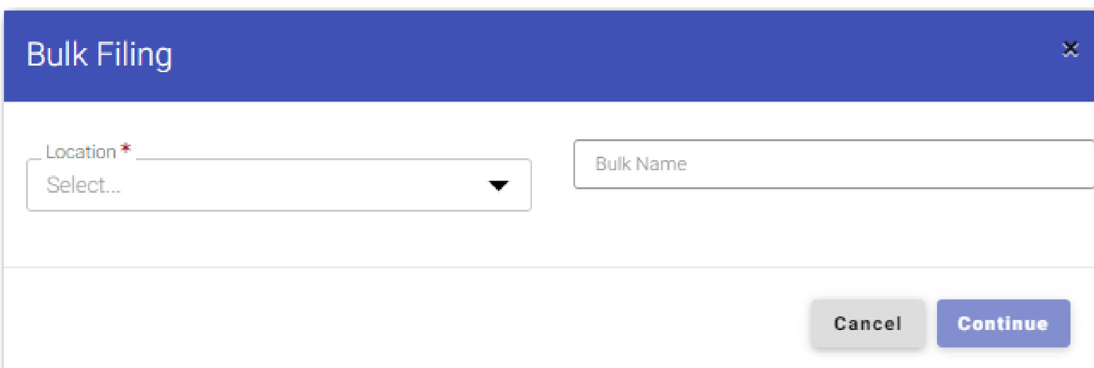



**Figure 18.42 – Bulk Filing Window**

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.

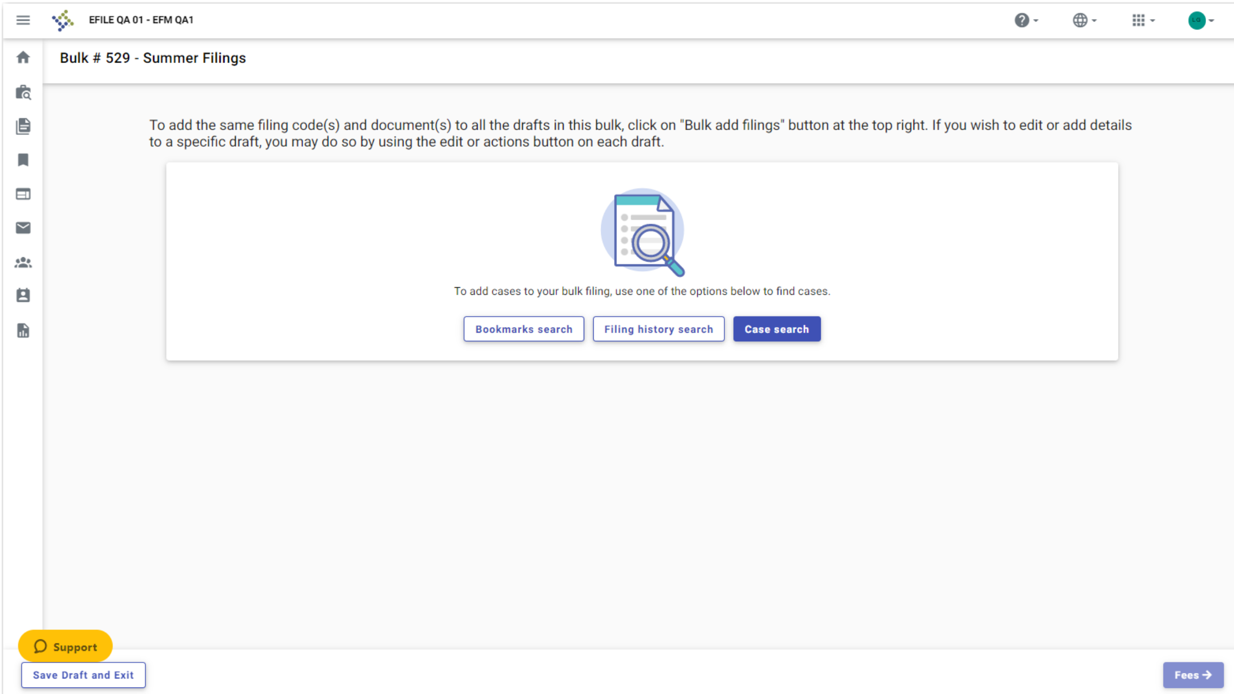



**Figure 18.43 – Example of a Bulk Filing Dashboard Page**

5. Click **Filing history search**.

   The *Filing History* page is displayed.

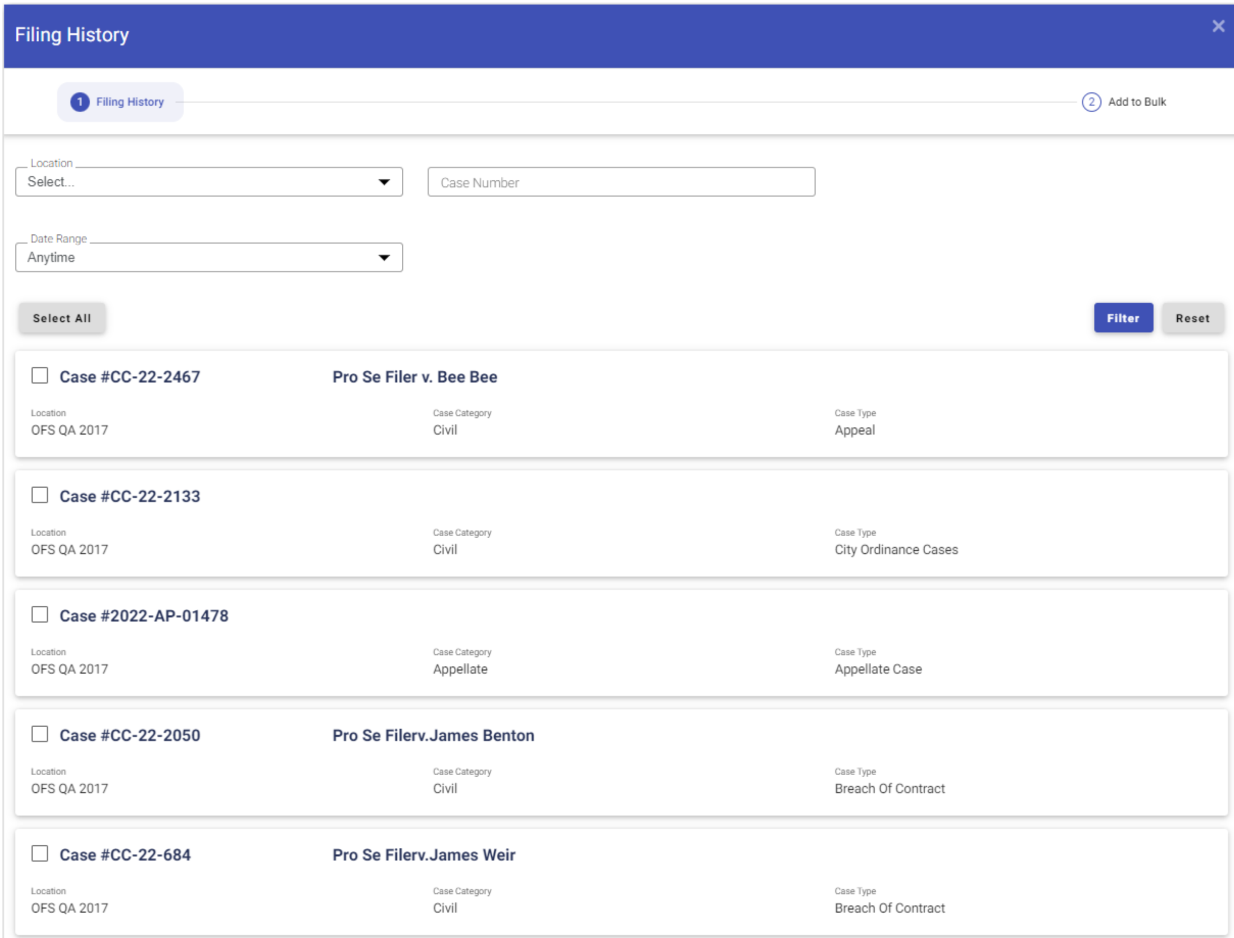



**Figure 18.44 – Example of a Filing History Page**

6. Select the bulk filing that you want to file into, and then click 

.

   **Note: If your bulk filing is not displayed on the *Filing History* page, you can search for the bulk filing that you want. 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** 

**.**

   The *Add to Bulk* window is displayed.

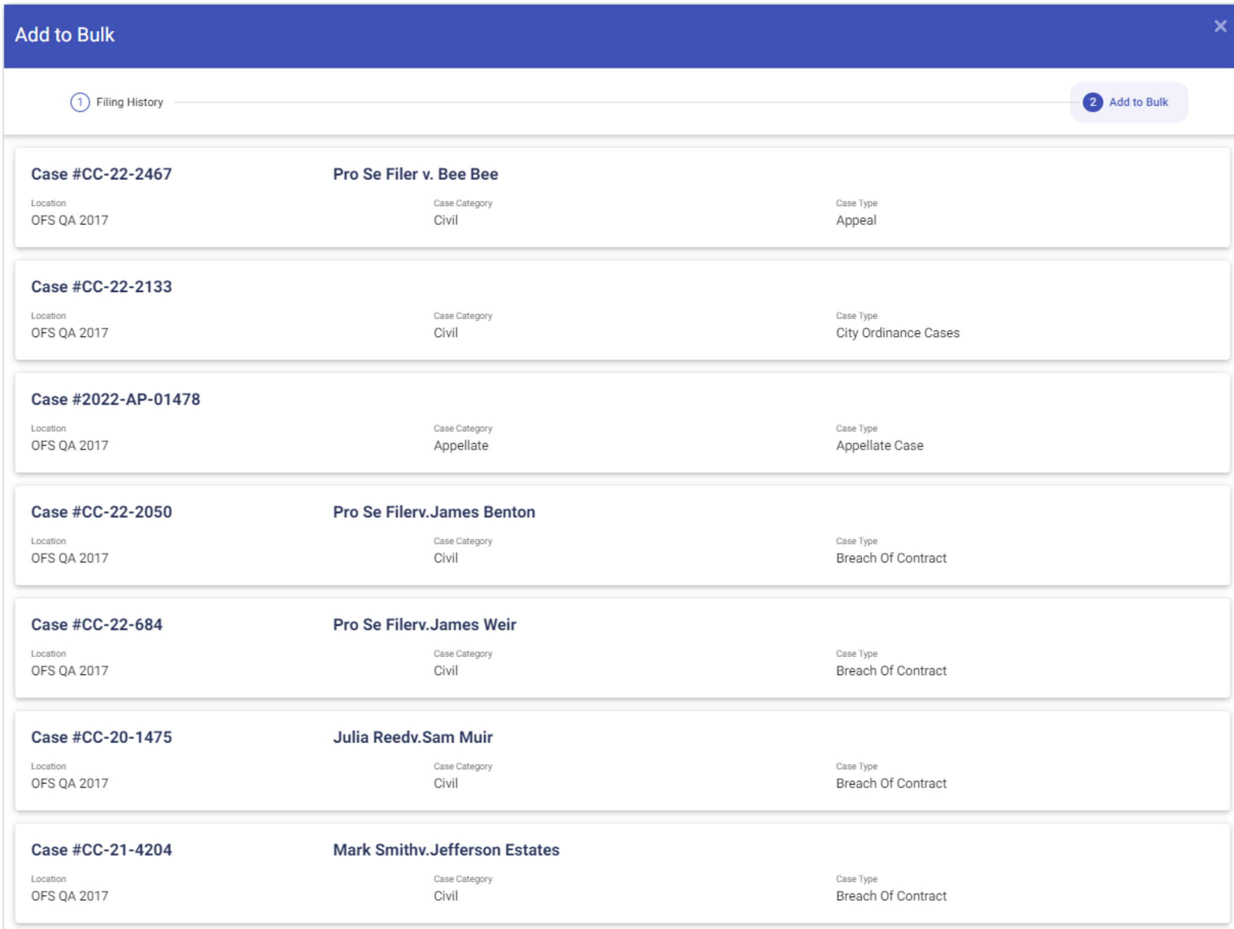



**Figure 18.45 – Example of an Add to Bulk Window**

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.

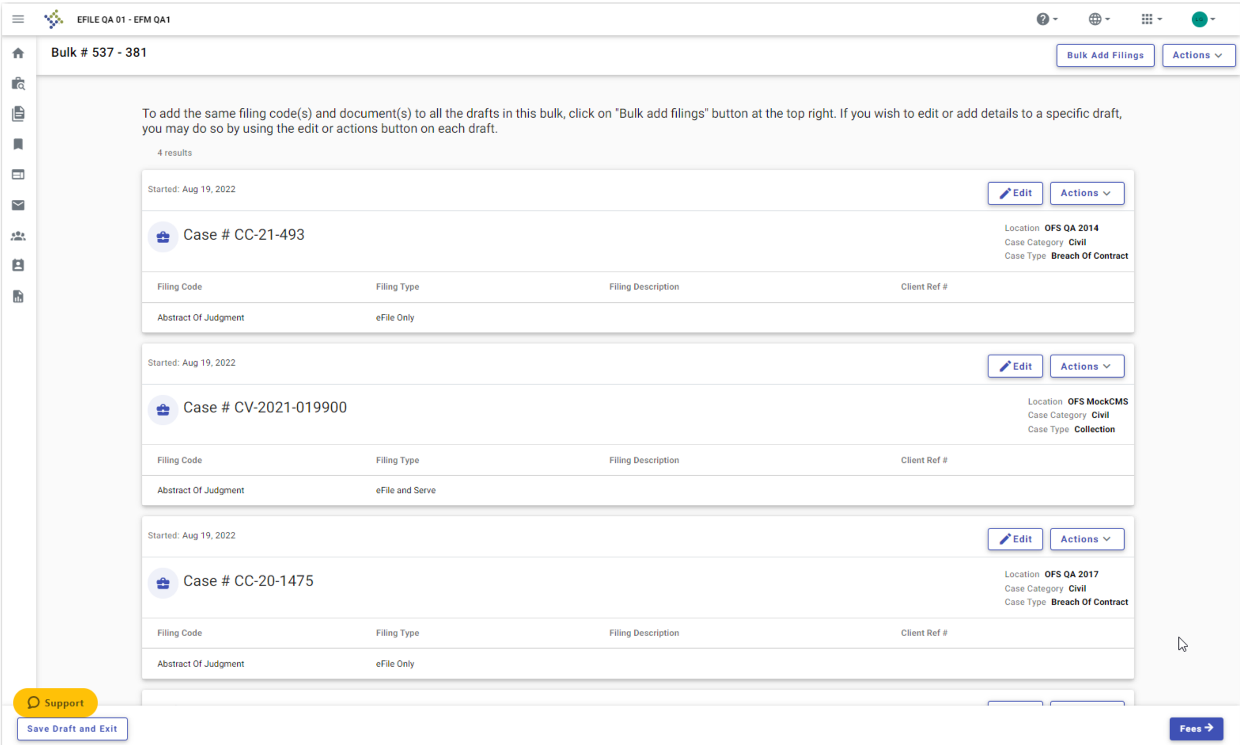



**Figure 18.46 – Example of a Bulk Filing Dashboard Page with Additional Cases Added**

# 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.

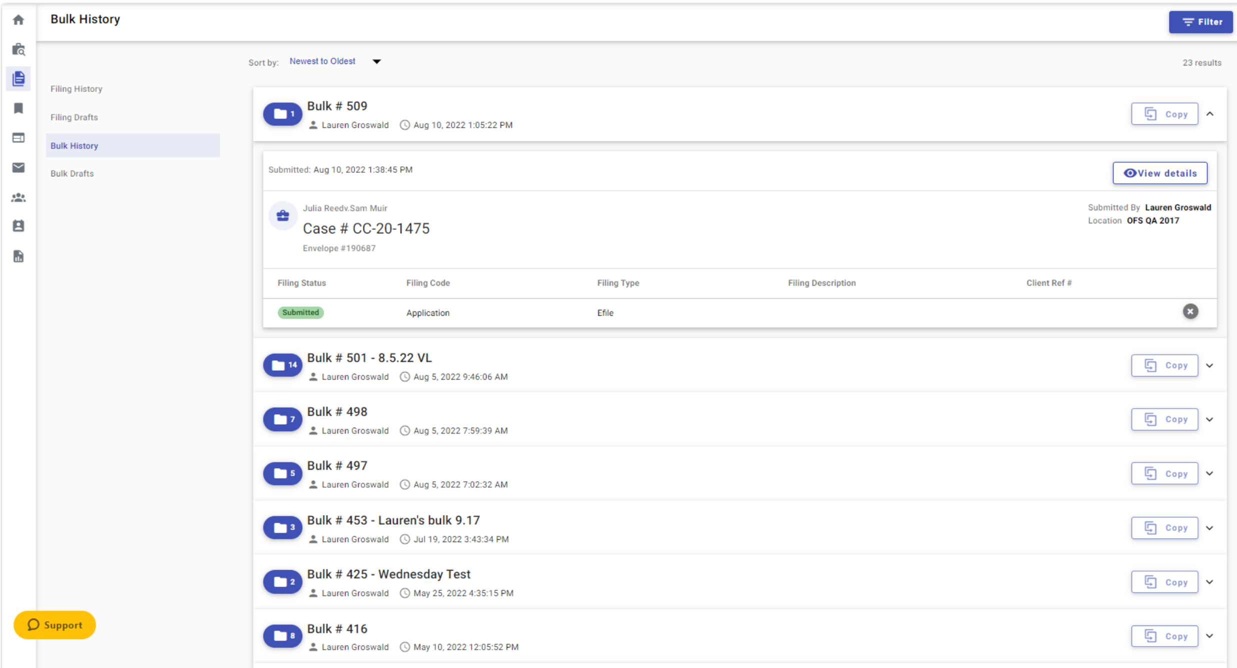



**Figure 18.47 – Example of a Bulk History Page**

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.

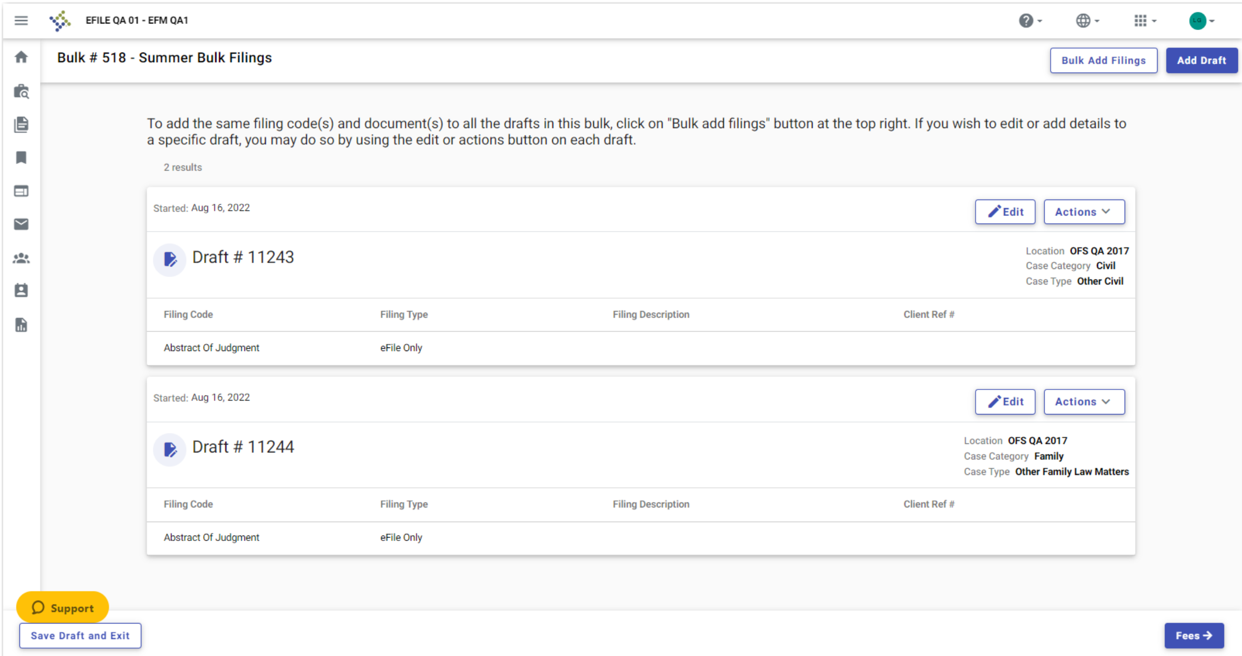



**Figure 18.48 – Example of a Bulk Filing Dashboard**

4. Continue with your filing.

# 19 Vacation Letter (or Leave of Absence)

**Topics covered in this chapter**



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 filer actions.

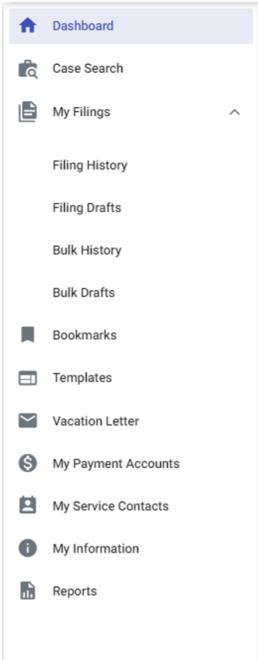



**Figure 19.1 – Example of a Dashboard**

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 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 32.

## Bulk History

The *Bulk History* page includes the filing history for your vacation letter (or leave of absence) filings.

From the Dashboard menu, click **Bulk History**. From here, you can view a history of your vacation letter (or leave of absence) filings.

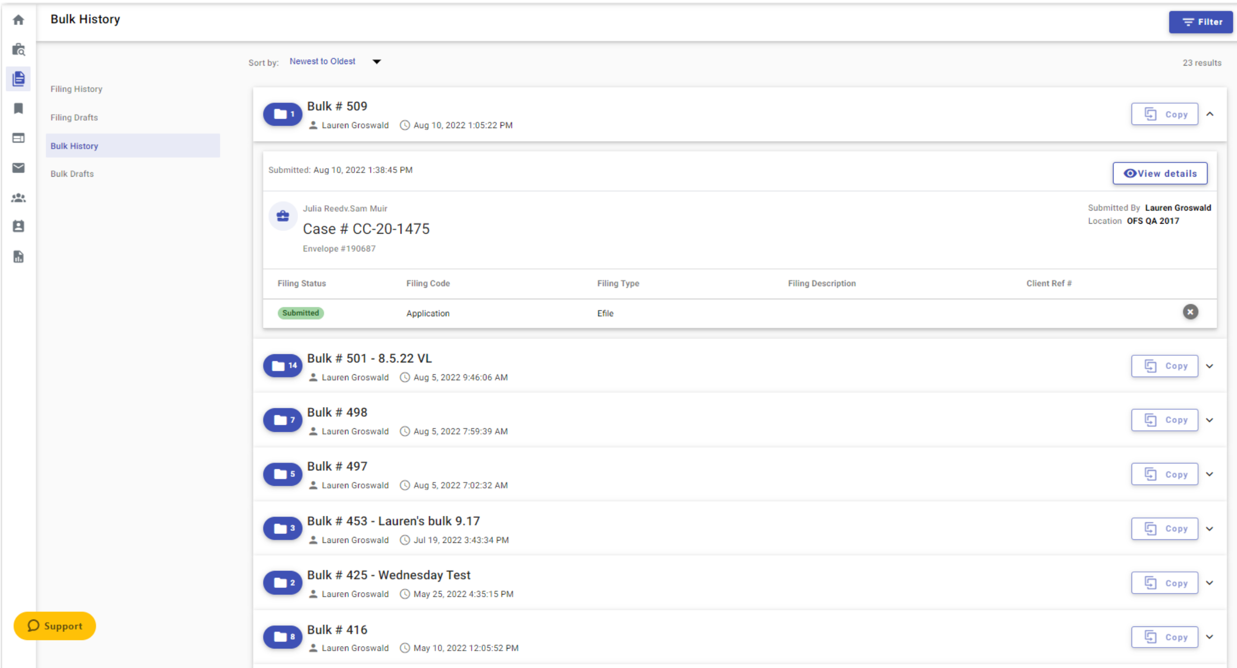



**Figure 19.2 – Example of a Bulk History Page**

# Bulk Drafts

The *Bulk Drafts* page includes the drafts of your vacation letter (or leave of absence) filings.

On the Dashboard menu, click **Bulk Drafts**. From here, you can view a list of your vacation letter (or leave of absence) draft filings, resume a draft filing, or delete a draft filing.

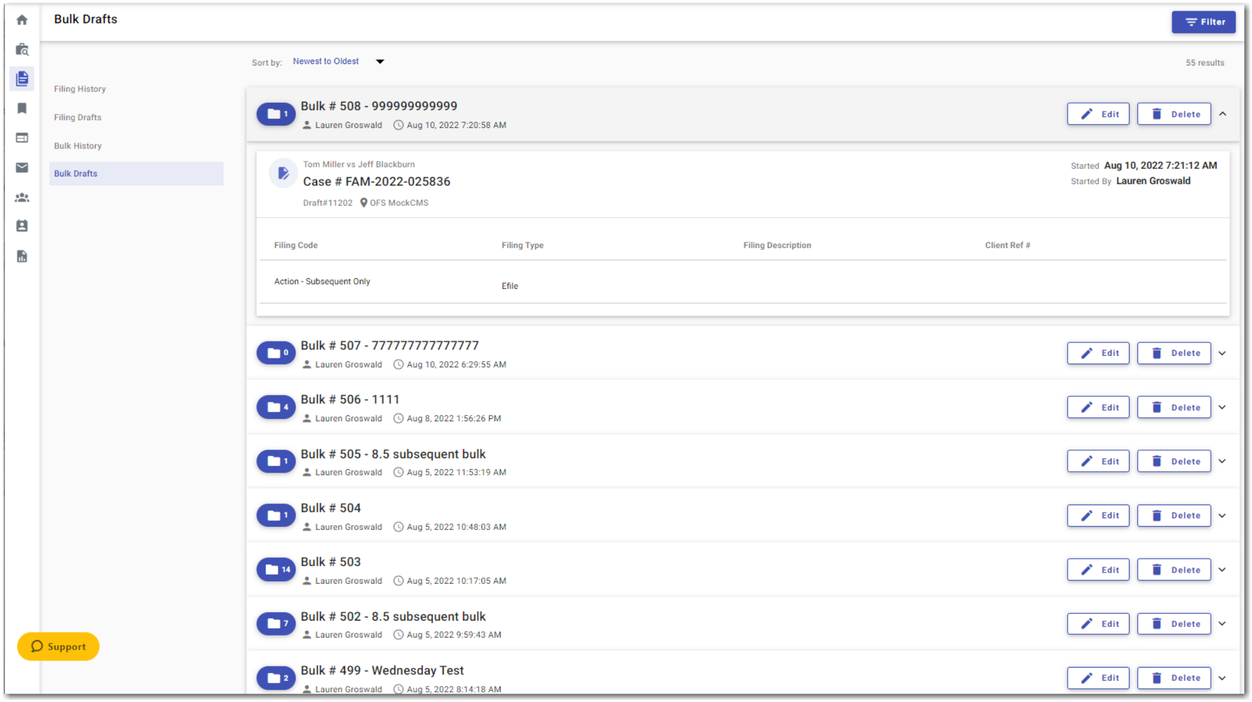



**Figure 19.3 – Example of a Bulk Drafts Page**

# 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.**

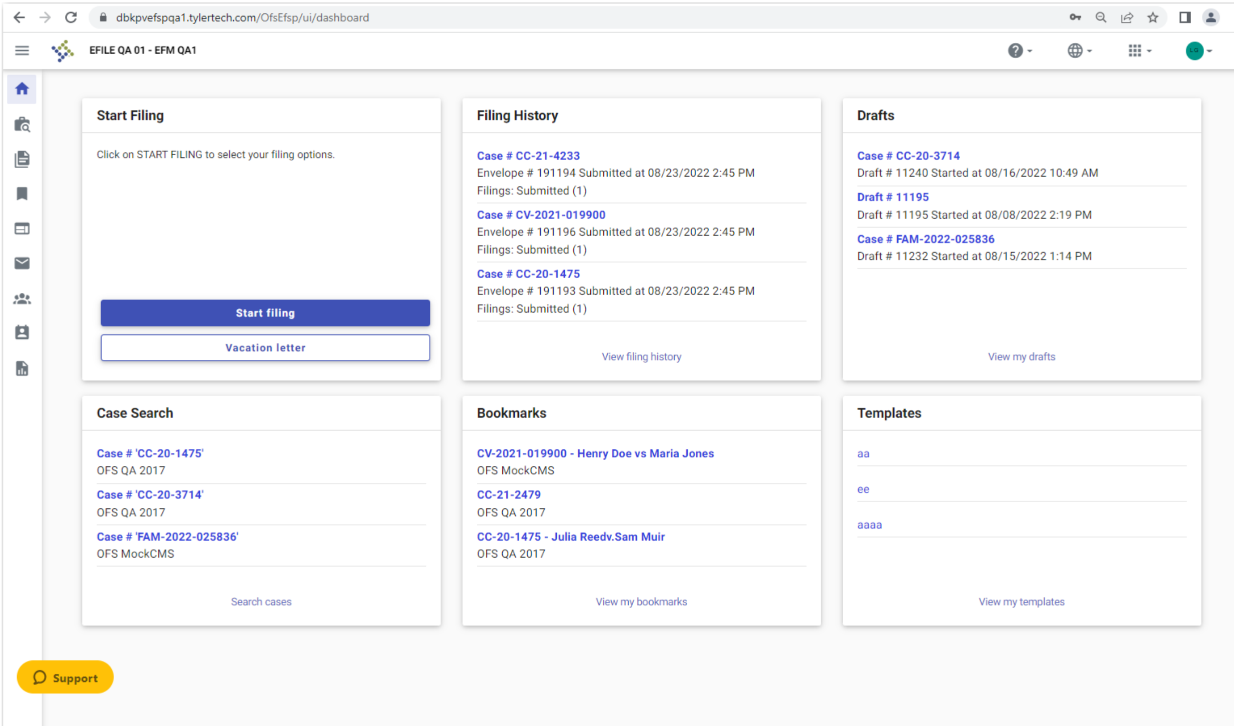
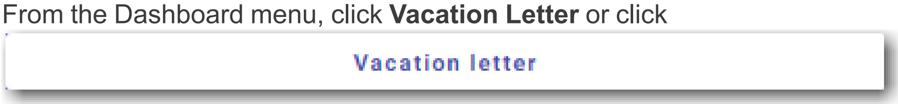



**Figure 19.4 – Example of a Dashboard Page**

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.

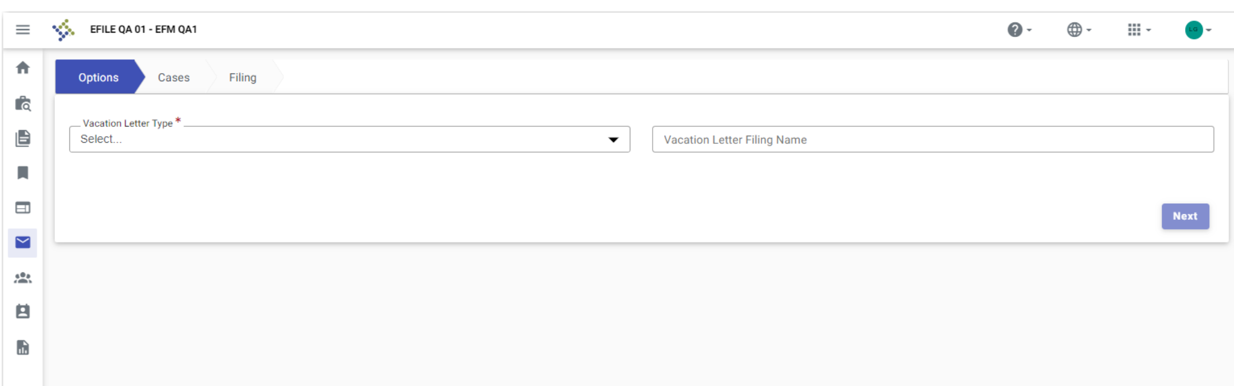



**Figure 19.5 – Options Tab on the File Vacation Letter Page**

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.

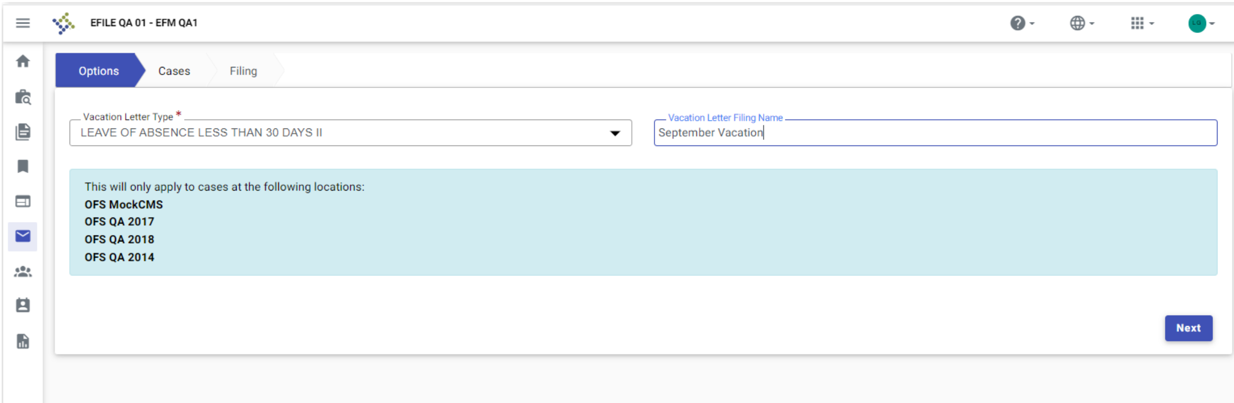



**Figure 19.6 – Example of an Options Tab on the File Vacation Letter Page with Fields Completed**

4. Click **Next**.

   The **Cases** tab is displayed. Your current cases are selected.

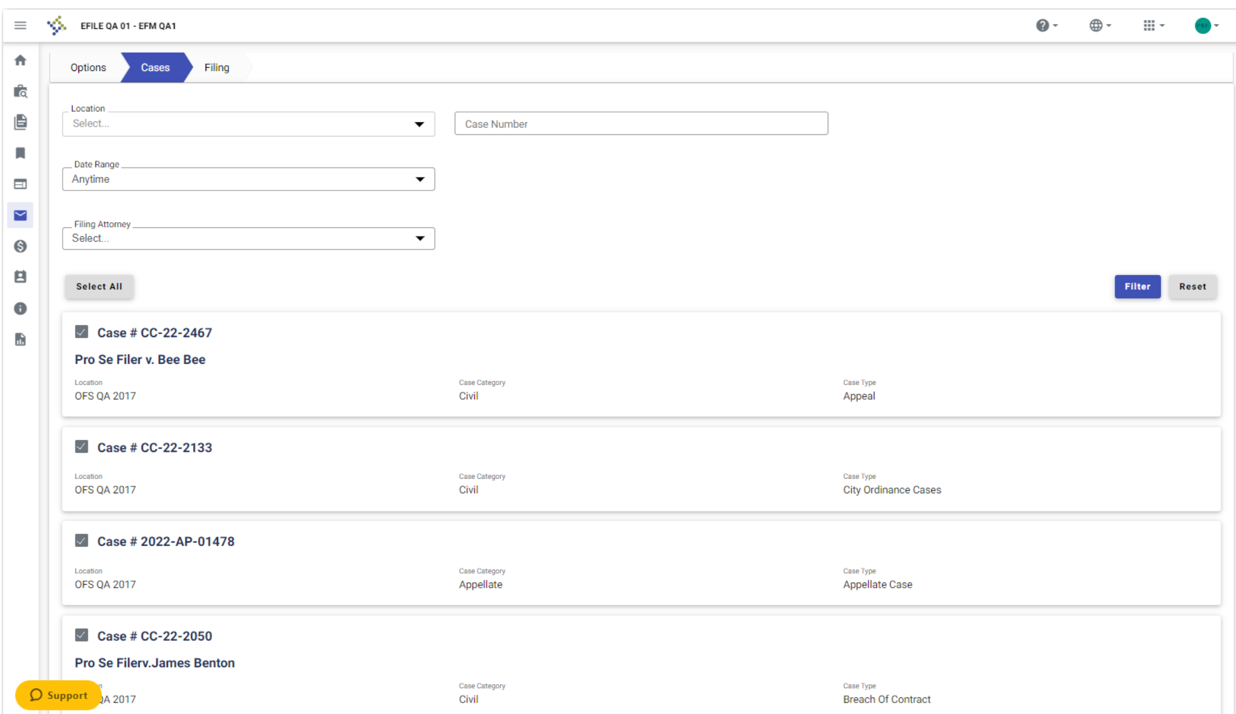



**Figure 19.7 – Example of a Cases Tab on the File Vacation Letter Page**

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 **Select All**.

   **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 Filter.**

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.

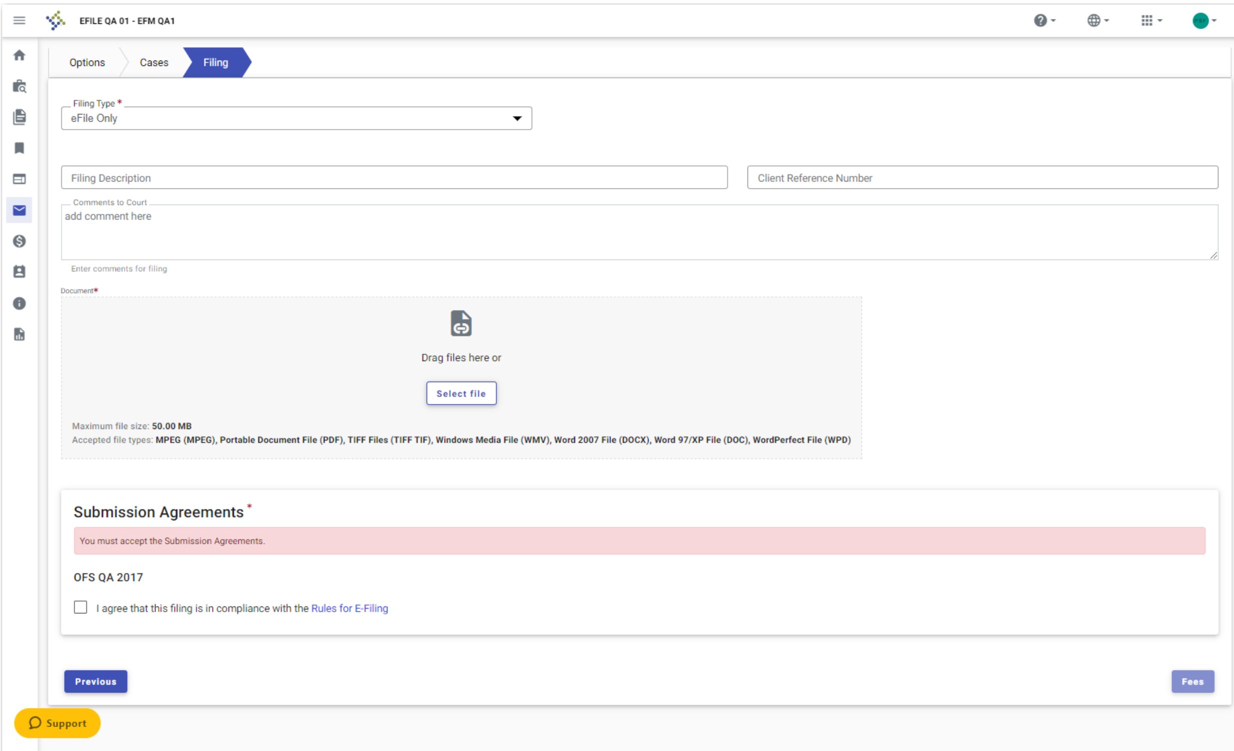



**Figure 19.8 – Filing Tab on the File Vacation Letter Page**

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.

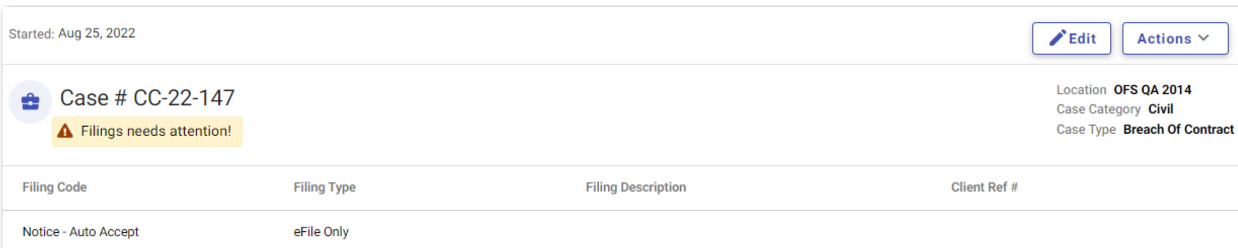



**Figure 19.9 – Example of a Case Card with a Filings Error**

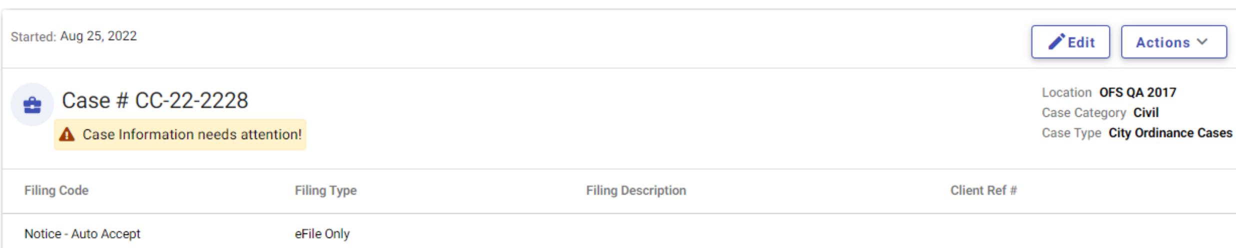



**Figure 19.10 – Example of a Case Card with a Case Information Error**

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.**

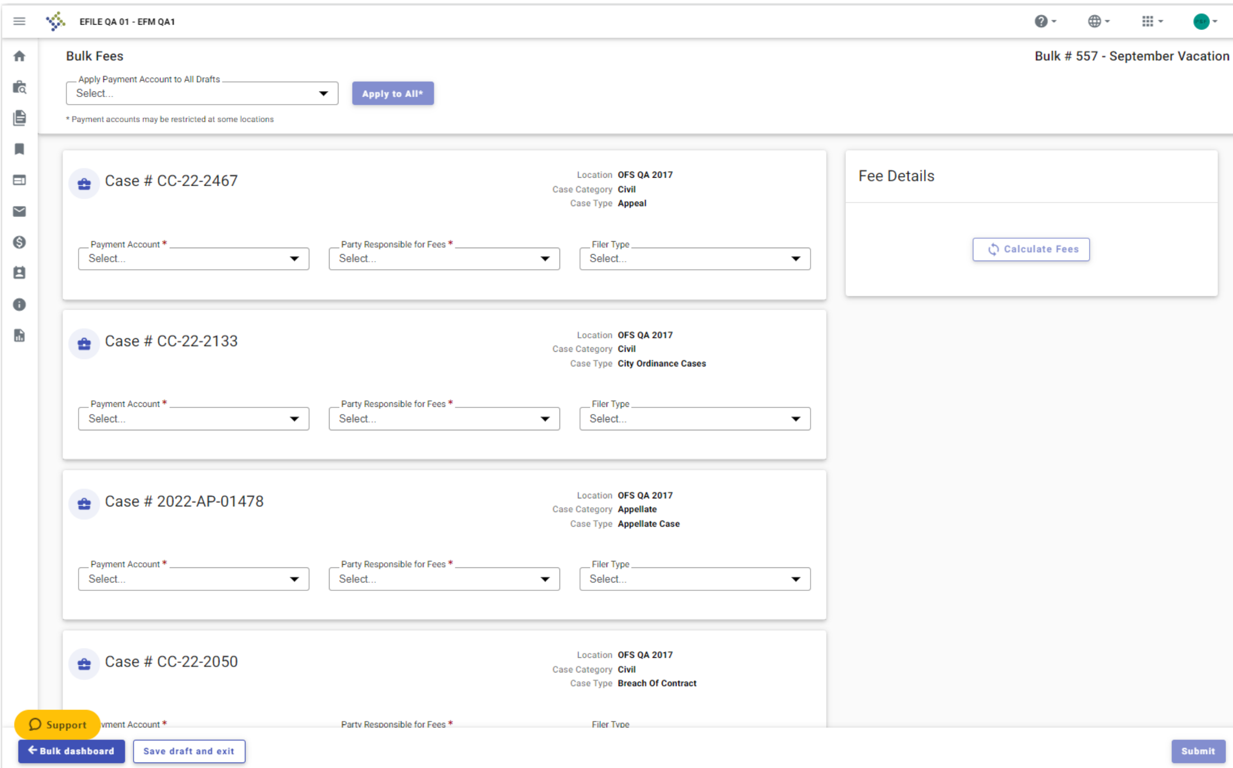


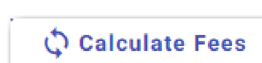

**Figure 19.11 – Example of a Bulk Fees Page**

To enter the payment information for your vacation letter filing:

**Note: If you do not want to apply the same payment account to all of the cases, you must select the payment account 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. 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.**
3. For each case, select the filer type from the **Filer Type** drop-down list.
4. When all of the fields on the page have been completed, click 

.

5. Review the filing fees, and then click 

.

   The *Bulk Submitting* window is displayed.

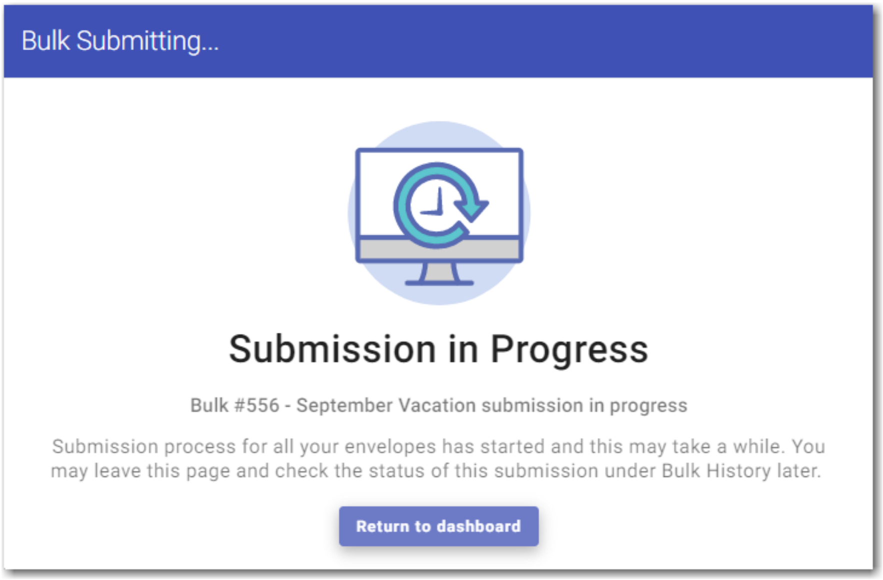



**Figure 19.12 – Example of a Bulk Submitting Window**

6. Click 

.

# 20 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 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.

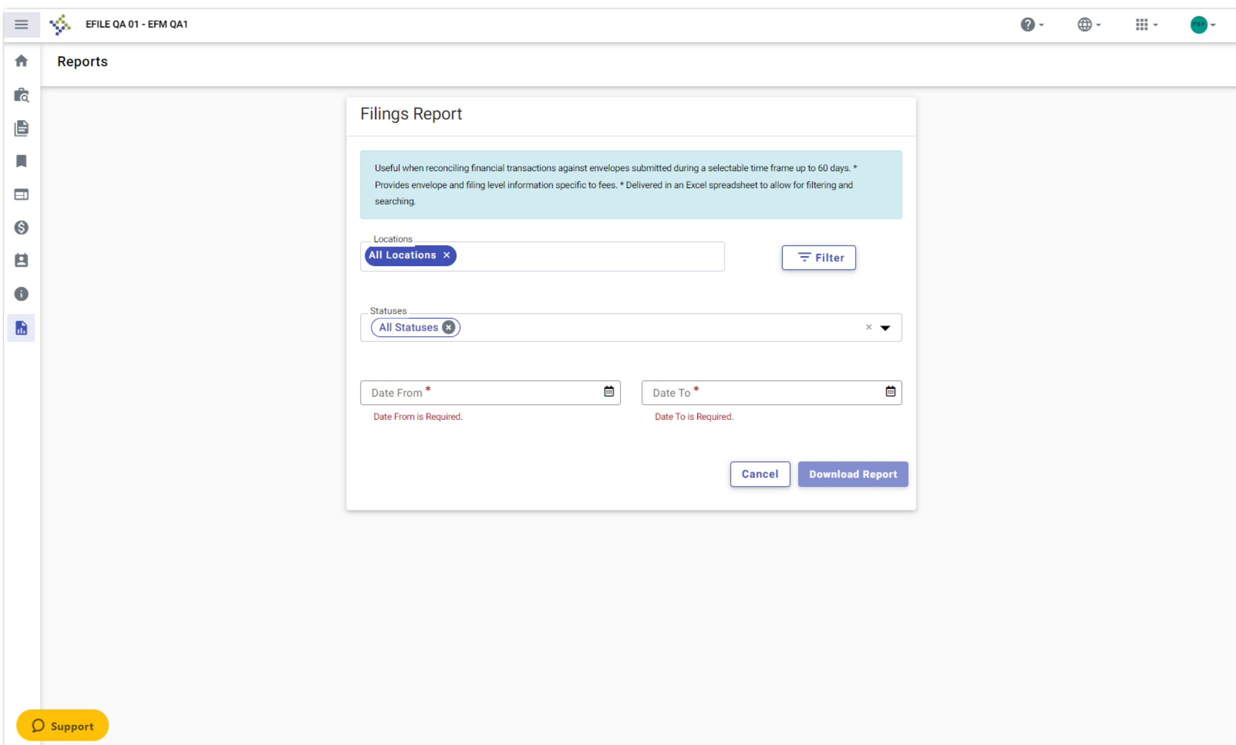



**Figure 20.1 – Example of a Filings Report Page**

2. Click 

to select the locations for which you want to run the report.

   The *Select Locations* dialog box is displayed.

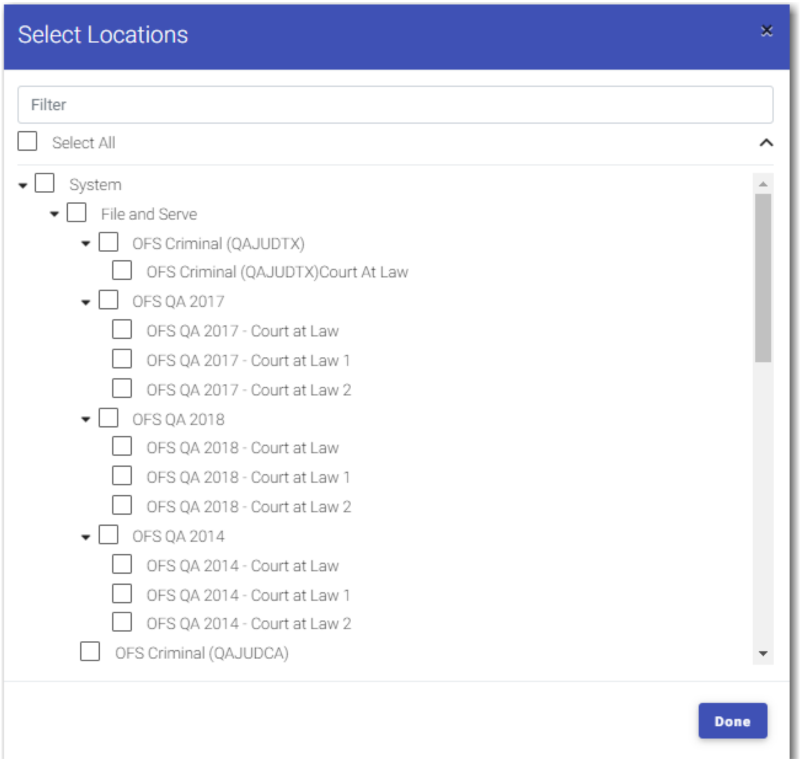



**Figure 20.2 – Select Locations Dialog Box**

3. Select the locations that you want to include in the report, and then click 

.
4. From the **Statuses** drop-down list, select the statuses that you want to include in the report.
5. 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.**

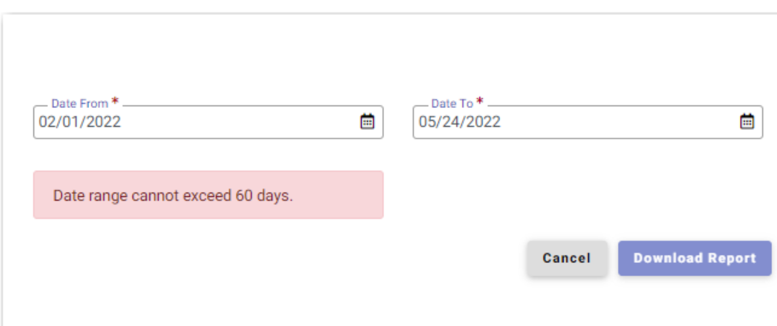
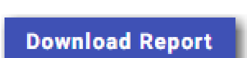



**Figure 20.3 – Error Message for Report Date Range**

6. 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.

# 21 Support and Feedback

**Topics covered in this chapter**



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.

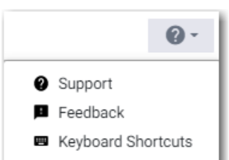



**Figure 21.1 – Support Drop-Down List**

2. Click **Support**.

   The *Support* window is displayed.

   **Note: Your screen may vary from the example provided.**

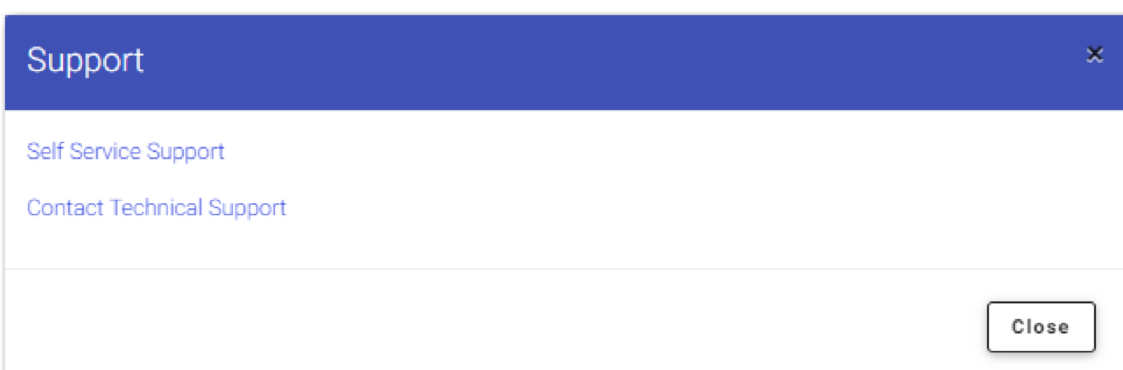



**Figure 21.2 – Example of a Support Window**

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.

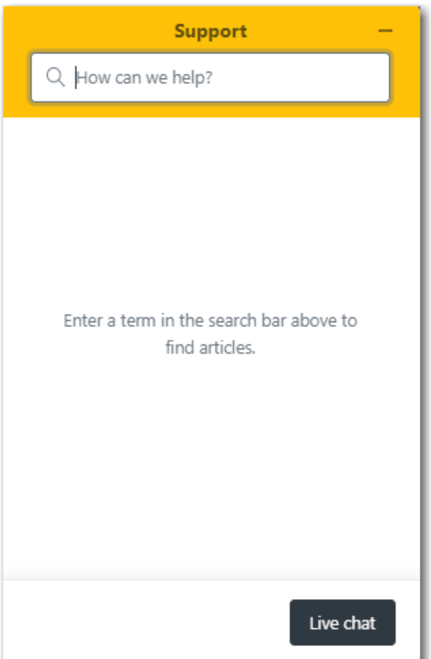



**Figure 21.3 – Support Chat Window**

In the chat window, click 

. Another window is displayed. From this window, you can start a chat with a Support representative.

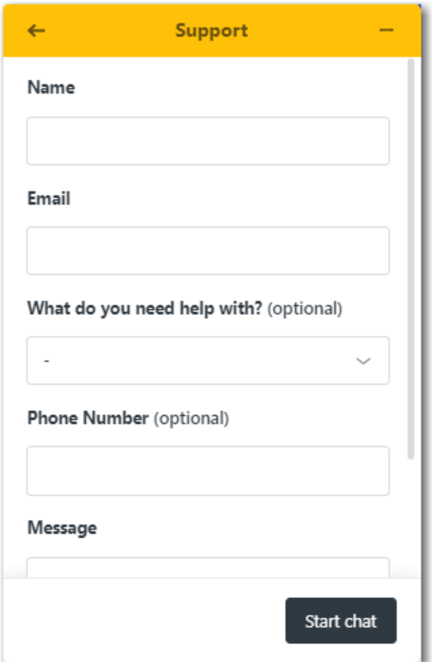



**Figure 21.4 – Start Chat Window**

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.

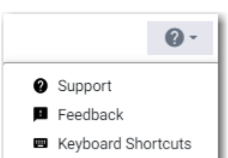



**Figure 21.5 – Support Drop-Down List**

2. Click **Feedback**.

   The *Feedback* window is displayed.

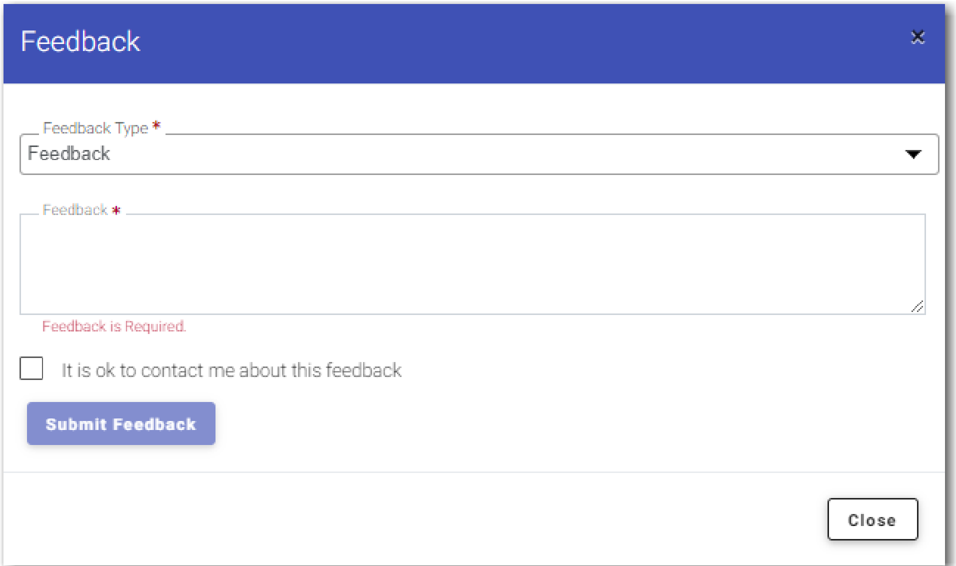



Figure 21.6 – Feedback Window

3. Select the appropriate option from the **Feedback Type** drop-down list.

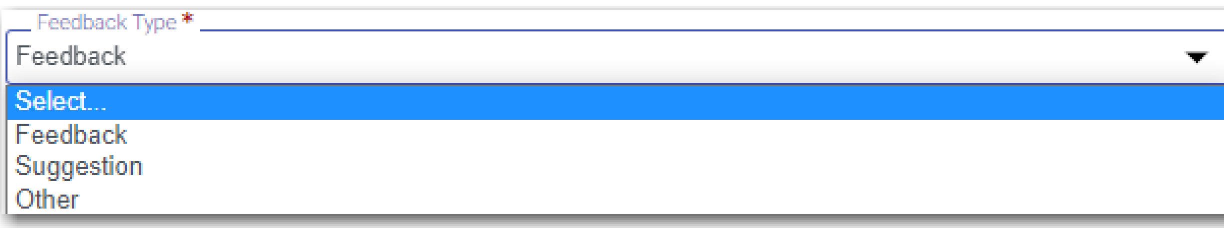



Figure 21.7 – Feedback Type Drop-Down List

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 Support Chat. |
| Odyssey File & Serve Email | efiling.support@tylertech.com |
| Odyssey File & Serve Telephone | 800.297.5377 |
| GoTo Assist (Support) | Support may ask to assist you by sharing your screen using GoToAssist. |