

# Firm Administrator User Guide Odyssey<sup>®</sup> File & Serve<sup>™</sup> 2021.4

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## Publishing History

Document Publication Number	Revision	Date	Changes Made
OFS-FS-220-4496 v.1	Initial	July 2019	Document Creation
OFS-FS-220-4496 v.2	Second	December 2019	The following changes were made:
			<ul> <li>Added sections for templates, bookmarks, and the Redaction feature.</li> </ul>
			<ul> <li>Added a procedure for non- indexed subsequent filing.</li> </ul>
			<ul> <li>Added a procedure for entering case information for a civil case.</li> </ul>
			<ul> <li>Added a procedure for entering case cross references to a filing.</li> </ul>
			<ul> <li>Added a procedure for entering a filing with a motion type code.</li> </ul>
			<ul> <li>Added a section for client support and feedback.</li> </ul>
			<ul> <li>Updated the description and screen shots of the Dashboard and the drop- down menu for filer actions.</li> </ul>
			<ul> <li>Updated screen shots throughout the document to reflect minor software changes.</li> </ul>
OFS-FS-220-4496 v.3	Third	February 2020	The following changes were made:
			<ul> <li>Added a procedure for filing a new case with a Will Filed date.</li> </ul>
			<ul> <li>Added a procedure for entering the date of death on the <i>Parties</i> page.</li> </ul>

Document Publication Number	Revision	Date	Changes Made
			<ul> <li>Added a procedure for entering a filing with an Ad Damnum amount.</li> </ul>
			<ul> <li>Added a procedure for entering a filing with a Claim Amount.</li> </ul>
			<ul> <li>Added a procedure for entering a filing with an Estate Value.</li> </ul>
			• Updated the <i>Parties</i> page.
			<ul> <li>Updated the procedure for entering a filing.</li> </ul>
			<ul> <li>Updated the Redaction section.</li> </ul>
			<ul> <li>Added a procedure for copying an envelope.</li> </ul>
			• Updated the <i>Fees</i> page.
			<ul> <li>Updated the Summary page.</li> </ul>
			<ul> <li>Updated the procedure for adding a new user to the firm.</li> </ul>
			<ul> <li>Updated the <i>Firm Users</i> page screen shot.</li> </ul>
OFS-FS-220-4496 v.4	Fourth	April 2020	The following changes were made:
			<ul> <li>Added the Return Date feature.</li> </ul>
			<ul> <li>Added the Hearing Date feature.</li> </ul>
			<ul> <li>Added a note throughout the document regarding the Party Responsible for Fees field.</li> </ul>
OFS-FS-220-4496 v.5	Fifth	June 2020	The following changes were made:
			Added the Reports feature.
			<ul> <li>Added the <b>Dashboard</b> button to the <i>Case Search</i> page.</li> </ul>
OFS-FS-220-4496 v.6	Sixth	September 2020	The following changes were made:
			<ul> <li>Updated release number to match the current software release</li> </ul>
			<ul> <li>Added browser support for Microsoft<sup>®</sup> Edge<sup>®</sup> to the</li> </ul>

Document Publication Number	Revision	Date	Changes Made
			"System Requirements" section
ESO-FS-220-4496 v.7	Seventh	December 2020	The following changes were made:
			<ul> <li>Added a note to the envelope details section regarding newly-added parties for subsequent filings</li> </ul>
			<ul> <li>Added a note in all existing case topics indicating that the Add Party button is configurable for subsequent filings</li> </ul>
			<ul> <li>Added a new screen shot for the <i>File into Existing</i> <i>Case</i> window when the <b>Party Name</b> search option is not displayed. Information was added to the following topics:</li> </ul>
			<ul> <li>Orientation</li> </ul>
			<ul> <li>Dashboard Page</li> </ul>
			<ul> <li>Filing into an Existing Case from the Case Search Page</li> </ul>
			<ul> <li>Filing into an Existing Case from the Dashboard Page</li> </ul>
			<ul> <li>Filing into a Non- Indexed Case</li> </ul>
			<ul> <li>Added a section describing the new Zendesk Help icon</li> </ul>
			<ul> <li>Changed the document numbering to reflect new standards</li> </ul>
ESO-FS-220-4496 v.8	Eighth	December 2020	The following changes were made:
			<ul> <li>Updated the screen shot for the <i>Reports</i> page</li> </ul>
			<ul> <li>Added the document security option to the "Creating a Service Only Filing" topic</li> </ul>
ESO-FS-220-4496 v.9	Ninth	February 2021	The following changes were made:

Document Publication Number	Revision	Date	Changes Made
			<ul> <li>Added information regarding the new Start Filing page</li> </ul>
			<ul> <li>Added information about the new Mail Service fees</li> </ul>
			<ul> <li>Added information about tracking certified mail for a filing on the <i>Envelope</i> <i>Details</i> page</li> </ul>
			<ul> <li>Updated the Service Contacts section to include information about the service method drop-down list on the Service page</li> </ul>
			<ul> <li>Updated the "Creating a Service Only Filing" topic</li> </ul>
			<ul> <li>Updated the "Filing into an Existing Case from the Dashboard Page" topic</li> </ul>
ESO-FS-220-4496 v.10	Tenth	March 2021	The following changes were made:
			<ul> <li>Reordered chapters to better represent normal usage during a case filing</li> </ul>
			<ul> <li>Updated the Upload Documents page to include all document types that are now supported for uploading</li> </ul>
			<ul> <li>Added the case level address feature</li> </ul>
			<ul> <li>Revised the "Viewing the Envelope Details" topic</li> </ul>
			<ul> <li>Created separate topic for viewing mail service fees in the envelope details</li> </ul>
ESO-FS-220-4496 v.11	Eleventh	May 2021	The following changes were made:
			<ul> <li>Added bulk filing to this release</li> </ul>
			<ul> <li>Added the ability to add a service contact that is not associated with any party on the case to an initial filing</li> </ul>

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## About This Guide

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

User guides may include the following elements:

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

#### Audience

This document is intended for the following personas:

- Clients
- Tyler Client Services

#### **Documentation Conventions**

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

Text Style	Description	Example
Bold	Shorthand notation for a menu, menu item, optional cascading menu, or selected tab	On the Main Menu, click <b>Tools</b> → <b>Options</b> → <b>Forms</b> .
	Objects to click or select, including buttons, check boxes, options in a drop-down list, elements, fields, and section header name	Click License Key Editor.
Fixed-Width	User interface (UI) input typed exactly as shown	Type the value Boston in the City field.
	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	Run the tables.sql script for the jcpBasketB database.
Italics	Page and dialog box names	Return to the <i>Home</i> page.
	Document titles	Refer to the Navigation Guide.
	Variable data to be replaced by an appropriate value	Type the <i>filename</i> .
"Quotation marks"	Chapter within a document	Refer to the "Logic Rules" chapter.
	Rights on a role Job tasks within a job definition	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
0	Note	Notes provide extra details about a topic or step.
<b>\</b>	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.
8	Danger	Danger messages indicate that a specific action could damage the database infrastructure or hardware.

# 1 System Overview

#### Topics covered in this chapter

- ◆ Release 2021.4 Enhancements
- ♦ Before You Begin

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

## Release 2021.4 Enhancements

The following enhancements were made to the Odyssey<sup>®</sup> File & Serve<sup>™</sup> system for Release 2021.4.

Feature/Update	Description/Location in Document
The bulk filing feature was added to this release.	Bulk Filing, page 173
The ability to add a service contact that is not associated with any party on the case to an initial filing was added in this release.	Adding a New Service Contact to a Filing, page 141

## Before You Begin

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

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

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

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

## System Requirements

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

• Browser Requirements—The system supports Chrome<sup>™</sup>; Mozilla<sup>®</sup> Firefox<sup>®</sup>; Microsoft<sup>®</sup> Edge<sup>®</sup>; or Safari<sup>®</sup> 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<sup>®</sup> Windows<sup>®</sup>, Linux<sup>®</sup>, Chrome OS<sup>™</sup>, Android<sup>™</sup>, iOS, and OS X<sup>®</sup> desktop class operating system software.
- Minimum Hardware Requirements—The system supports the following hardware:
  - Intel<sup>®</sup> Core<sup>™</sup> Duo processors or Advanced Micro Devices, Inc. (AMD) processors manufactured in 2012 or later

- 2 gigabytes (GB) of random-access memory (RAM)
- 1366 x 768 resolution screens for desktop computers, or 1280 x 720 resolution screens for mobile devices
- Recommended Hardware Requirements—Tyler recommends the following hardware:
  - Intel<sup>®</sup> Core<sup>™</sup> i3 or AMD A6 processors with at least a 2.0 GHz clock speed
  - 4 GB of RAM
  - 1920 x 1080 resolution for both desktop computers and mobile devices
- Connection Requirements—A high-speed Internet connection is recommended.
- Document Format—The following document formats are supported:
  - Adobe<sup>®</sup> PDF
  - Adobe TIFF
  - Microsoft Windows Media Video (WMV)
  - Microsoft Word (DOCX, DOC)
  - MPEG (MPG)
  - WordPerfect<sup>®</sup> (WPD)
  - XML

## **Page Navigation**

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

#### Using the Mouse

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

#### Using the Keyboard

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

### **Error Messages**

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

#### **Enter Data in Required Fields**

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

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

## Orientation

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

#### **Dashboard Page**

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

= 🐝 eFile Dashboard	≣ 🐝 eFile Dashboard							
Start Filing	Filing History	Drafts						
Click on START FILING to select your filing options. You could initiate a case or file into an existing case.	Envelope # 165149 Envelope # 165149 Submitted at 01/24/2020 9:22 AM Filings: Submitted (1)	Draft # 9063 Draft # 9063 Started at 01/22/2020 3:55 PM						
	Envelope # 745447	Draft # 9062 Draft # 9062 Started at 01/22/2020 3:54 PM						
	Envelope # 745447 Submitted at 12/16/2019 4:54 PM Filings: Submitted (1)	Draft # 9060 Draft # 9060 Started at 01/22/2020 1:42 PM						
	Case # cc-15-1813 Envelope # 157230 Submitted at 11/05/2019 9:06 PM Filings: Accepted (1)							
START FILING	View Filing History	View My Drafts						
Case Search Q	Bookmarks	Templates						
	<b>CC-15-1813 - ********</b> OFS QA 2017							
	CC-19-3942 - b b v. a a OFS QA 2017 - Court at Law							
	CC-15-230 File and Serve							
Search Cases	View My Bookmarks	View My Templates						

Figure 1.1 – 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.

Location *		
Select	÷	
Location is Required.		
Search for a Case by Case Number O Party Name		X
Case number format is default.		•
Case Number \star		
Case Number is Required.		

Figure 1.2 – File into Existing Case Window—Includes Party Name Option

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

ration *			
Select	÷		
ocation is Required.			
Case number format is default.			
e Number 🗚			
ase Number is Required.			
	CANCEL	SEARCH	

If your search does not produce any results, click to return to the *Dashboard* page.

≡ 🐝 •File Case Search	<b>?</b> -	•-	•	💄 announge rougenation and 👻
← DASHBOARD				REFINE SEARCH
Figure 1.4 Coop Search Page with No Search Populto Diaple	wod			

#### Figure 1.4 – Case Search Page with No Search Results 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.

■      ✓      Gene Filing History					0. ⊕. ≣.			
Filing History Filter	FILING HISTORY FILING D					10 Result(a) Page 1 of 1		
Created By	Envelope # 16	55241						
My Filings     My Firm	Envelope # 165241 Submitted 01.	/28/2020 3:49 PM on behalf of Sam Smith by Firm Admin Filing Code	Filing Type	Filing Description	Client Ref #			
Status	Submitted	Appointment	eFile Only			8		
All Statuses     Accepted     Cancelled     Receipted	Envelope # 16 Envelope # 165228 Submitted 01	55228 /28/2020 10:39 AM on behalf of Sam Smith by Firm Admin						
Keceipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	⊗		
O Submitting	Case # 1234	Case # 1234						
Location	Envelope # 165224 Submitted 01,	/28/2020 8:47 AM on behalf of Sam Smith by Firm Admin						
Any Location	Filing Status     Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #			
Case Number / Envelope Number	Envelope # 16		enie and Serve					
Case Number		/28/2020 8:29 AM on behalf of Sam Smith by Firm Admin						
Envelope Number	_							
Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #			
Anytime     Last Month     Last Week	Case # CC-19 Envelope # 165222 Submitted 01.	-3477 /28/2020 8:23 AM on behalf of Sam Smith by Firm Admin				p 🖹 🔛 🗄		
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	×		
From Date	Envelope # 10	55221				B 🖃 🗄		
To Date		/28/2020 8:17 AM on behalf of Sam Smith by Firm Admin						
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #			

Figure 1.5 – 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.

≡ 🐝 eFile Filing Drafts					<b>0</b> -	<b>.</b>	<b></b> -	•	
Filing Drafts Filter	FILING HISTORY FILIN	IG DRAFTS						23 Result(s) Page 1 of 2	
Created By		Case # CC-19-3477 Datt # 0749 Started 11/5/19 9:53 AM by Fem Admin							
My Filings     My Firm	Filing Status	Filing Code	Filing Type	Filing Description		Client F	Ref #		
Location	Draft # 6722	)	eFile Only						
Any Location +	Draft # 6722 Started 10/31/19	-							
Case Number / Draft Number	Filing Status	Filing Code	Filing Type	Filing Description		Client F	Ref #		
Case Number	Draft	Acknowledgement	eFile and Serve	Acknowledgement					
Draft Number	Case # CC-1								
Date Range	Draft # 6702 Started 10/30/19	9 2:30 PM on behalf of Jack Stone by Firm Admin							
Anytime     Last Month	Filing Status UnexpectedError	Filing Code Acknowledgement	Filing Type eFile and Serve	Filing Description Acknowledgement		Client F	Ref #		
C Last Week C Last Two Days C Today Pick a Custom Range	Draft # 6689 Started 10/28/19	9 5:31 PM on behalf of Abby Carmichael by Firm Ad	Imin						
From Date	Filing Status Draft	Filing Code Proposed Order	Filing Type eFile Only	Filing Description Proposed Order		Client F	Ref #		
To Date	Case # cc-1								
	Draft # 5611 Started 10/15/19								
RESET FILTER									
RESET FILTER	Case # CC-1 Draft # 5610 Started 10/15/19							Þ	

Figure 1.6 – 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.

≡ 🐝 eFile Bookmarks				0-	<b>⊕</b> - <b>Ⅲ</b> -	±
Bookmark Filter						4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description			
Any Location + Case Number	Case # CC-19-2373	Location OFS QA 2017 - Court at Law	Case Description Drina Colin v. McDonald Associates LLC			
Case Number Case Description	Cane # CC-19-3477	Location OFS QA 2017	Case Description			
Case Description           RESET         FILTER	Case # CC-19-438	Location OFS QA 2018	Case Description			
	Previous 1 Next		G			4 Results Page 1 of 1

Figure 1.7 – Sample Bookmarks Page

#### Templates

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

≡ 🔆 eFile Templates				<b>ଡ</b> - ⊕- Ⅲ-	Emerican States
Filter Type Firm Templates	Name \$		FILTER RESET		ADD TEMPLATE
Favorite		Name	Туре		Actions
*		Tech Pubs Test	New Case		
☆		test	Existing Case		1
☆		Template XYZ	New Case		
☆		Template ABC	New Case		
Previous 1 Next					4 Results Page 1 of 1

Figure 1.8 – Templates Page

#### **Firm Users**

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

	USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
Name	Last	Name	Email	FILTER RESET		ADD USE
rst Name	Middle Name	Last Name	Email	Firm	Criminal	Actions
rm		Admin	gmail.com	Admin	Admin + Filer	1
bhn		Doe	jdoe@abcfirm.com		Filer	1
eddy		Jones	gmail.com		Filer	1
ne		Smith	jane.smith@xyzfirm.com			1
m		User	gmail.com		Filer	1

Figure 1.9 – Sample Firm Users Page

#### **Firm Attorneys**

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

≡ 🐝 eFile Attorneys			<b>0</b> -	⊕- Ⅲ-	-
USERS		ATTORNEYS	PAYMENT ACCOUNTS	FIRM	DETAILS
First Name	Last Name	Bar Number	FILTER RESET		ADD ATTORNEY
First Name	Middle Name	Last Name	Bar Number		Actions
Abby		Carmichael	123		/
Perry		Mason	123		/
Jack		Stone	123		1
Previous 1 Next					3 Results Page 1 of 1



#### **Firm Payment Accounts**

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

E 🎲 eFile Payment Accounts			0	· • •	
USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
count Name	Account Type Select	Account Status     Select	• FILTER RESET		
Payment Account Name	Payment Account Type	Status	Last 4 Digits		Actions
Firm's CC	Credit Card	Active	5454		1
Mary Ann's Waiver	Waiver	Active			1
New Mastercard	Credit Card	Active	5454		1
Previous 1 Next					3 Results Page 1



#### **Firm Details**

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

≡ 🐝 eFile Firm Details			<b>8</b> -	<b>.</b>	<b></b> -	L
USERS	ATTORNEYS	PAYMENT ACCOUNTS				FIRM DETAILS
Film Name ABC Test Firm Country United States	_					
Address Line 1 <b>*</b> 5101 Tennyson Pkwy		Address Line 2				
Cry * Plano P	State * Texas	zip code <b>≭</b> € 75024				
9727133770						SAVE

Figure 1.12 – Sample Firm Details Page

#### **Firm Service Contacts**

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

≡			<b>0</b> -	)• <b>∭</b> • <b>≜</b> mannananan ana•
iirst Name	Last Name	Email Address	FILTER RESET	ADD SERVICE CONTACT
First Name	Last Name	Email Address		Actions
Test	Contact	testcontact@gmail.com		
Susie	Potter	susiep@gmail.com		
Pro	Se	gmail.com	n	1
Patte	Smith	patte.smith@gmail.com		
Russ	Smith	russ.smith@gmail.com		1
Tonia	Smith	tsmith@gmail.com		1
Previous 1 Next				6 Results Page 1 of



#### **Account Settings**

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

		<b>?</b> -	<b>.</b>	<b></b> -	A PROBERTY CONTRACTOR -
Old Password 🗚					
Old Password is Required.					
New Password 🕊	Re-enter New Password				
New Password is Required.					
Password must be 8 characters long and include numbers, s	pecial characters and at least one capital letter.				SAVE



#### 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 or a member of your firm submitted.

EFILE QA 01 Reports			<b>?</b> -	<b>.</b>	•	<b>2</b>	- 1000
eports							
Useful when reconciling financial transaction	ns against envelopes submitted during a selectable time frame up to 60	D days. * Provides envelope and filing level information specific to fees. * Del	ivered in an Excel spre	adsheet to al	low for filterin	g and searching.	
Created By	Location						
<ul> <li>My Filings</li> </ul>	All SELECT						
O My Firm							
Status		Date From \star		Date To 🗚			
All Statuses			<b></b>				<b></b>
<ul> <li>Accepted</li> </ul>	Reviewed						
✓ Cancelled	Served	Date From is Required.		Date To	is Required		
Receipted	Submission Failed						
<ul> <li>Returned</li> </ul>	Submitted						
						CANCEL DOV	WNLOAD REPORT
						CANCEL	WNEUAD REPORT

Figure 1.15 – Reports Page

# **2** E-Filing Overview

#### Topics covered in this chapter

#### Filing Queue Status

This section describes the e-filing process.



#### **The E-Filing Process**

#### Figure 2.1 – The E-Filing Process

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

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

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

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

## Filing Queue Status

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

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

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

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.
		Note: Once a filing reaches the Under Review status, it cannot return to the Submitted status. Selecting the End Review retains the Under Review status and returns the filing to the queue.
Receipted	EFO, EFS	The filing has been acknowledged by the court as received, but it is not being transmitted to the case management system to become part of the court record. The filing may or may not be part of the proposed order work flow.
Accepted	EFO, EFS	The reviewer has reviewed the filing and accepted it.
Rejected	EFO, EFS	The reviewer has reviewed the filing and rejected it.
Returned	EFO, EFS	The reviewer has reviewed and returned the filing because the filer must take additional action.
Served	SO	Service Only filings are completed.

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



#### Topics covered in this chapter

- Registering as a Firm Administrator
- Resetting Your Password
- Changing the User Password
- Updating Firm Information

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



Figure 3.1 – eFile Landing Page

## Registering as a Firm Administrator

REGISTER

You can register your firm in the Odyssey File & Serve system. To register as a Firm Administrator:

1. On the *Landing* page, click

Jage, click

The Registration - Select Type page is displayed.



Figure 3.2 – Registration - Select Type Page

FIRM 2. Click

The Registration - User Information page is displayed.

≡ 🐝 eFile Registration - User Information				<b>?</b> -	<b>.</b>	•	ANONYMOUS -
Select Type User Information Firm Information							
First Name *	Middle Name		Last Name 🗚				
First Name is Required.			Last Name is Required.				
Email Address *		Confirm Email Address 🖈					
Email Address is Required.		Confirm Email Address is Required.					
Password *		Confirm Password 🗶					
Password is Required.		Confirm Password is Required.					
RESELECT TYPE							NEXT

NEXT

Figure 3.3 – Registration - User Information Page

3. Complete the required fields, and then click

The Registration - Firm/Contact Information page is displayed.

				<b>?</b> -	<b>.</b>	 ANONYMOUS -
Select Type User Information Firm Information						
Firm Name *						
Firm Name is Required.						
Country						
United States +						
Address Line 1 🛊		Address Line 2				
Address Line 1 is Required.						
City *	State *		Zip Code \star			
	Select	¢				
City is Required.	State is Required.		Zip Code is Required.			
Phone Number *						
Phone Number is Required.						
I agree to the Terms and Conditions						
You must accept the Terms and Conditions.						
USER INFORMATION						SUBMIT

Figure 3.4 – Registration - Firm/Contact Information Page

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

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

🐝 eFile Terms And Conditions	<b>8</b> -	<b>.</b>	<b></b> -	ANONYMOUS
File Usage Agreement				
relcome to the online services of Tyler Technologies for QonoS. Please read this Agreement carefully. It governs Your access to and use of the Odyssey File & Serve application through the Tyler Tech				
te and/or other Tyler products is conditioned upon Your acceptance of this Agreement. By clicking on the "I Accept" button, You are agreeing to be legally bound by all of the terms and conditions of t	nis Agreement.	If You are a	cting as an	employee, You agr
at this Agreement will bind Your employer and that You are authorized to do so. As used in this Agreement, "You" or "Your" includes You and Your employer.				
action 1. Definitions				
ection 2. License; Restrictions on Use				
ection 3. Access to the Tyler Internet Site				
ction 4. Limitations on Use				
ction 5. Fee Schedule				
ction 6. Proprietary Rights				
ction 7. Disclaimers and Limitations				
ction 8. Your Warranties and Indemnification				
ction 9. Limitations of Liability				
ction 10. Arbitration				
ction 11. Miscellaneous				
ection 1. Definitions				
e following terms have the following meanings in this Agreement: "Authorized User" means any of Your employees, agents, independent contractors or consultants who agree to be bound by the ter	ns and conditio	ns of this A	greement a	ind who are
thorized or otherwise designated or permitted by You to access and use the Tyler Services pursuant to the License. "E-Document" refers to any document or discrete compilation of text and/or graph	ical informatior	in electror	iic form sui	table for submission
to the Odyssey File & Serve program. "Enhancement" means any correction, modification, customization, revision, enhancement, improvement, update, upgrade, new release or other change that is re	eased generally	by Tyler Te	chnologies	for the Tyler
rvices. "Fee Schedule" means Tyler's current Fee Schedule for use of the Tyler Services, as may be altered or amended from time to time by Tyler. "Information" means the records, data, databases, d	ocuments, mate	rials, and c	ther inform	ation accessible
rough the Tyler Services. "License" means the limited license granted to You under this Agreement. "Proprietary Rights" means any patent, copyright, trademark, service mark, trade secret or other int	ellectual proper	ty right. "Th	ird Party Co	ontent" means any
ntent, records, data, documents, materials, or other information supplied to Tyler pursuant to an agreement with a third party for inclusion as part of, or for use with, the Tyler Services. "Tyler" means	Fyler Technolog	ies, Inc. an	d its operati	ing units and
risions. "Tyler Internet Site" means the Tyler efiling web sites (and all Enhancements thereto) with such other Web sites owned or maintained by Tyler and its affiliates from time to time. "Tyler Service	s" means, colle	ctively, Tyle	r's Odyssey	File & Serve
plication and any related services made available to You and any Authorized User from Tyler from time to time. "Tyler Technology" means any know-how, processes, methodologies, specifications, d	esigns, inventio	ns, functior	ality, graphi	ics, techniques,
thods, applications, computer programs, user manuals, on-line documentation, products or other technology and materials of any kind, or any Enhancement thereto, used by Tyler in connection with	the performance	e of the Ty	ler Services	or made available
er to You, any Authorized User or any third party through the Tyler Internet Site. "Unauthorized Use" means any use, reproduction, distribution, disposition, possession, disclosure or other activity, inc	uding, without I	mitation, a	ny bulk rese	elling involving any
pect of the Tyler Services, the Tyler Internet Site or Information that is not expressly authorized under this Agreement or otherwise in writing by Tyler. "User Identification" means the unique user iden	ification name a	and passwo	ord issued a	or otherwise assign
each Authorized User for access to and use of the Tyler Services.				
ction 2. License; Restrictions on Use				
1 License.				
bject to the restrictions and limitations set forth in this Section 2 and elsewhere in this Agreement, Tyler hereby grants to You a nonexclusive, nontransferable, limited license to do the following durin	g the term of th	is License:	(a) enable '	Your Authorized
sers to access and use the Tyler Services subject and according to the terms of this Agreement solely for Your internal use in the regular course of Your business; (b) subject to any applicable third p	rty rights or res	trictions of	law, reprod	luce insubstantial

Figure 3.5 – Example of Terms and Conditions

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



The Registration - Success page is displayed.

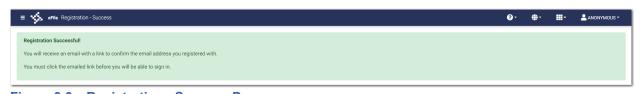


Figure 3.6 – Registration - Success Page

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

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

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

## **Resetting Your Password**

To reset your password:

1. On the Odyssey File & Serve Landing page, click

I FORGOT MY PASSWORD

Reset Password

Email Address \*

Email Address is Required.

I'm not a robot

Prinzey-Tema

CANCEL

RESET PASSWORD

The *Reset Password* window is displayed.

#### Figure 3.7 – Reset Password Window

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

VERIFY

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

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

4. Click the requested images, and then click

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.

R	eset Password	×
	Click the link in your email to complete the password reset process.	
	CLOSE	

Figure 3.8 – Reset Password Window – Complete Reset Process

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

Password Reset Request
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 <u>no-reply@tylerhost.net</u> >

Figure 3.9 – Example of Password Reset Request Email

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

You are prompted to create a new password.

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

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

- 10. Retype your new password in the Repeat New Password field.
- 11. Click Change Password.

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

## **Changing the User Password**

You can change your password on the Account Settings page.

To change your password:

1. On the Dashboard menu, click Account Settings.

The Account Settings page is displayed.

≡		<b>?</b> -	<b>.</b> -	<b></b> -	L montraccomponencion -
Old Password *					
Old Password is Required.					
New Password ¥	Re-enter New Password				
New Password is Required.					
Password must be 8 characters long and include numbers, s	pecial characters and at least one capital letter.				
					SAVE

#### Figure 3.10 – Account Settings Page

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

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

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



Your password is changed.

## **Updating Firm Information**

You can update the firm's information.

To update the firm's information:

1. On the Dashboard menu, click Firm Details.

The Firm Details page is displayed.

≡ 🐝 •File Firm Details			<b>8</b> -	<b>.</b>	<b></b> -	2 martin	
USERS	ATTORNEYS	PAYMENT ACCOUNTS			FIRM DETAILS		
Firm Name ABC Test Firm Country United States • Address Line 1 <b>*</b> 5101 Tennyson Pikwy		Address Line 2					
Coy * Plano Prove Number * 9727133770	Sute * Texas	ze cose <b>*</b> ● 75024				SAVE	

Figure 3.11 – Sample Firm Details Page

2. Update any information as needed, and then click



#### Topics covered in this chapter

- Signing In
- Signing Out

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

## Signing In

Note: Click

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.

#### REGISTER

to register if you have not registered before.

To sign in to the application:

- 1. Navigate to the Odyssey File & Serve Landing page.
- 2. Click
- 3. Type your email address and password (which is case-sensitive).

Sign	n	×
\$	odyssey identity provider	
	Please sign in to continue	
	Email Email	
	Password	
	Sign In	
Forg	ot your password? RESET PASSWORD CLC	SE

Figure 4.1 – Sign In Page



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

Sign Out

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

## Signing Out

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

To sign out of the application:

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



Figure 4.2 – Sign Out Drop-Down List

You are now signed out of the application.



#### Topics covered in this chapter

#### Dashboard Page

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

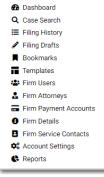


Figure 5.1 – Dashboard

From here, you can perform the following actions:

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

## **Dashboard Page**

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

E 🌾 eFile Dashboard 🕹 😁 🗰 -							
Start Filing	Filing History	Drafts					
Click on START FILING to select your filing options. You could initiate a case or file into an existing case.	Envelope # 165149 Envelope # 165149 Submitted at 01/24/2020 9:22 AM Filings: Submitted (1)	Draft # 9063 Draft # 9063 Started at 01/22/2020 3:55 PM Draft # 9062					
	Envelope # 745447 Envelope # 745447 Submitted at 12/16/2019 4:54 PM Filings: Submitted (1)	Draft # 9062 Started at 01/22/2020 3:54 PM Draft # 9060 Draft # 9060 Started at 01/22/2020 1:42 PM					
	Case # cc-15-1813 Envelope # 157230 Submitted at 11/05/2019 9:06 PM Filings: Accepted (1)	urart # 4000 Starteo at 01/22/2020 1.42 PM					
START FILING	View Filing History	View My Drafts					
Case Search Q	Bookmarks	Templates					
	<b>CC-15-1813 - *******</b> OFS QA 2017						
	<b>CC-19-3942 - b b v. a a</b> OFS QA 2017 - Court at Law						
	CC-15-230 File and Serve						
Search Cases	View My Bookmarks	View My Templates					

Figure 5.2 – Dashboard Page

#### Account Setup

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

You are not ready to file electronically!						
A paymer	nt account a	nd an attorney are required to file electronically.				
CREATE P		Missing Ready				
			REMIND ME	LATER		

Figure 5.3 – Warning Message

#### Start Filing

START FILING

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

#### **Filing History**

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

■ 🔆 eFile Filing History					Ø II-	± memory and -
Filing History Filter	FILING HISTORY FILING DR					10 Result(s) Page 1 of 1
Created By	Envelope # 16					
My Filings     My Firm	Envelope # 165241 Submitted 01/28	3/2020 3:49 PM on behalf of Sam Smith by Firm Admin	Filing Type	Filing Description	Client Ref #	
Status	Submitted	Appointment	eFile Only			8
All Statuses     Accepted     Cancelled     Receipted	Envelope # 16	5228 3/2020 10:39 AM on behalf of Sam Smith by Firm Admin				
Keceipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref $\pi$	8
O Submitting	Case # 1234 Envelope # 165224 Submitted 01/28	3/2020 8:47 AM on behalf of Sam Smith by Firm Admin				
Any Location +	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Case Number / Envelope Number	Accepted	Action - Subsequent Only	eFile and Serve			
Case Number	Envelope # 165223 Submitted 01/28	5223 3/2020 8:29 AM on behalf of Sam Smith by Firm Admin				
Envelope Number	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Date Range	SubmissionFailed	Appendix	eFile Only	1 mg beautymen		
Anytime     Last Month     Last Week	Case # CC-19- Envelope # 165222 Submitted 01/28	3477 A/2020 8:23 AM on behalf of Sam Smith by Firm Admin				B
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8
From Date	Envelope # 16	5221				B 💷 🗄
To Date		2020 8:17 AM on behalf of Sam Smith by Firm Admin				
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #	

Figure 5.4 – Filing History Page

#### Drafts

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

≡ 🐝 eFile Filing Drafts					<b>?</b> -	⊕- II	• <b>1</b> maarn.comgaaan.com •
Filing Drafts Filter	FILING HISTORY FILM	NG DRAFTS					23 Result(s) Page 1 of 2
Created By	Case # CC-*						
<ul> <li>My Filings</li> </ul>		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,					
O My Firm	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
Location	Draft	-	eFile Only				
· · ·	Draft # 6722	2					▶  ≘  :
Any Location	Draft # 6722 Started 10/31/1	9 2:33 PM by Firm Admin					
Case Number / Draft Number	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
Case Number	Draft	Acknowledgement	eFile and Serve	Acknowledgement			
Draft Number	Case # CC-7	19-3477					
Date Range	Draft # 6702 Started 10/30/1	9 2:30 PM on behalf of Jack Stone by Firm Admin					
Anytime     Last Month	Filing Status UnexpectedError	Filing Code Acknowledgement	Filing Type eFile and Serve	Filing Description Acknowledgement		Client Ref #	
O Last Week	Draft # 6689	9					
O Last Two Days O Today		9 5:31 PM on behalf of Abby Carmichael by Firm Ac	min				
O Pick a Custom Range	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
From Date 🗎	Draft	Proposed Order	eFile Only	Proposed Order			
To Date	Case # cc-1	45333					
i o batte	Draft # 5611 Started 10/15/1	9 9:18 AM by Firm Admin					
RESET FILTER	Case # CC-7	19-3477					▶ 🗑 :
	Draft # 5610 Started 10/15/1	9 9:17 AM by Firm Admin					

Figure 5.5 – Filing Drafts Page

#### **Case Search**

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

le into Existing Case	
Select	\$
Location is Required.	
Search for a Case by Case Number Party Name	Y.
Case number format is default.	•
Case Number 🛪	
Case Number is Required.	
	CANCEL SEARCI

Figure 5.6 – File into Existing Case Window—Includes Party Name Option

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

×	
н	

Figure 5.7 – File into Existing Case Window—Excludes Party Name Option

If your search does not produce any results, click	← DASHBOARD to return to the <i>Dashboard</i> page.
≡ 🏡 eFile Case Search	Ø- ⊕- Ⅲ- <b>≗</b> -
← DASHBOARD	REFINE SEARCH

.



#### **Bookmarks**

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

= 🐝 eFile Bookmarks				<b>0</b> -	۰.	<b></b> .	A 199407-10079/00444-1096 -
Bookmark Filter							4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description				
Any Location \$	Case #	Location	Case Description				
Case Number	CC-19-2373	OFS QA 2017 - Court at Law	Drina Colin v. McDonald Associates LLC				
Case Number	Case #	Location	Case Description				
Case Description	CC-19-3477	0FS QA 2017					
Case Description	Case #	Location	Case Description				
RESET FILTER	CC-19-438	0FS QA 2018					
	Previous 1 Next						4 Results Page 1 of 1
			>				

Figure 5.9 – Sample Bookmarks Page

#### Templates

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

≡ 🐝 eFile Templates			<b>?</b> -	•	±
Filter Type Name Filter Type • •	FILTER	R RESET			ADD TEMPLATE
Favorite	Name	Туре			Actions
*	Tech Pubs Test	New Case			۱
☆	test	Existing Case			<ul> <li>Image: A set of the set of the</li></ul>
☆	Template XYZ	New Case			🖻 🖊 🗄
☆	Template ABC	New Case			۱
Previous 1 Next					4 Results Page 1 of 1

Figure 5.10 – Templates Page

# 6 Firm Administrator Functions

#### Topics covered in this chapter

- Manage Firm Users
- Manage Attorneys

Firm Administrators are responsible for managing users, attorneys, and payment accounts along with updating firm information.

## Manage Firm Users

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

## Adding a New User to the Firm

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

#### To add a new user to your firm:

1. On the Dashboard menu, click Firm Users.

The Firm Users page is displayed.

	USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
t Name		Last Name	Emai	FILTER RESET		ADD USER
ïrst Name	Middle Name	Last Name	Email	Firm	Criminal	Actions
īrm		Admin	gmail.com	Admin	Admin + Filer	1
ohn		Doe	jdoe@abcfirm.com		Filer	1
reddy		Jones	gmail.com		Filer	1
ane		Smith	jane.smith@xyzfirm.com			1
irm		User	gmail.com		Filer	1
Previous 1 Nex						S Result(s) Page 1





Additional fields are displayed in a pane.

- 3. Type the name of the new user in the **First Name** and **Last Name** fields. If you know the middle name, type it in the **Middle Name** field.
- 4. Type the new user's email address in the Email field.

5. Select the check boxes for the roles that you want to assign to the new user. If you do not want to assign a role to the user, leave the check box cleared.

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

6. Click EDIT to assign the Criminal Filer role.

The Edit user criminal filer role window is displayed.

Edit user criminal filer role	×
Filter	
Select All	^
▼ □ System	<u>_</u>
✓ ☐ File and Serve	
✓ OFS Criminal (QAJUDTX)	
OFS Criminal (QAJUDTX)Court At Law	
▼	
OFS QA 2017 - Court at Law	
OFS QA 2017 - Court at Law 1	
OFS QA 2017 - Court at Law 2	
- OFS QA 2018	
OFS QA 2018 - Court at Law	
OFS QA 2018 - Court at Law 1	
OFS QA 2018 - Court at Law 2	
- OFS QA 2014	
OFS QA 2014 - Court at Law	
OFS QA 2014 - Court at Law 1	
OFS QA 2014 - Court at Law 2	
OFS Criminal (QAJUDCA)	•
	DONE

Figure 6.2 – Edit User Criminal Filer Role Window

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

DONE

- 8. After selecting the locations, click
- 9. After you have entered all of the information for the new user, click



First Name	Middle Name	Last Name	Email		Firm	Criminal	Actions
							1
First Name * Firm Email * firm.person@abcd.co	n	Midde Name		Last Name * Person			
Roles Firm Admin		Criminal Firm Admin		Criminal Filer No	EDIT		
(1) An email notifying	will receive two emails: them that they were invited by you to join reset their password so they can sign in to						
							CANCEL

Figure 6.3 – Sample New Firm User Pane

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

### Editing a Firm User's Information

To edit a firm user's information:

1. On the Dashboard menu, click Firm Users.

The Firm Users page is displayed.

	USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
Name	Last I	Name	Email	FILTER RESET		ADD US
rst Name	Middle Name	Last Name	Email	Firm	Criminal	Actions
rm		Admin	gmail.com	Admin	Admin + Filer	1
bhn		Doe	jdoe@abcfirm.com		Filer	1
eddy		Jones	gmail.com		Filer	1
ine		Smith	jane.smith@xyzfirm.com			1
rm		User	gmail.com		Filer	1

Figure 6.4 – Firm Users Page

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

The information for the specified firm user is displayed.



3. Update the necessary information, and then click

SAVE

## Removing a User from the Firm

To remove a user from the firm:

1. On the Dashboard menu, click Firm Users.

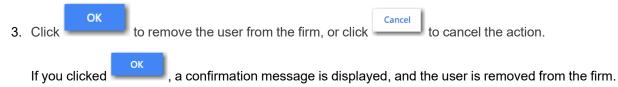
The Firm Users page is displayed.

≡ 🐝 eFile Us	sers				?- ⊕-	🛄 • 🔹 HINNETSEETINGSSAME SERA •
	USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
irst Name	Last Narr	10	Email	FILTER RESET		ADD USER
First Name	Middle Name	Last Name	Email	Firm	Criminal	Actions
Firm		Admin	gmail.com	Admin	Admin + Filer	1
John		Doe	jdoe@abcfirm.com		Filer	1
Freddy		Jones	gmail.com		Filer	1
Jane		Smith	jane.smith@xyzfirm.com			1
Firm		User	gmail.com		Filer	1
Previous 1 Nex	ct.					S Result(s) Page 1 of



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

The warning message is displayed: Are you sure you want to delete user "xyz"?



## Manage Attorneys

The Firm Administrator is responsible for managing firm attorneys.

## Adding an Attorney to the Firm

To add an attorney to the firm:

1. On the Dashboard menu, click Firm Attorneys.

The Attorneys page is displayed.

= 🐝 eFile Attorneys			0	- <b>.</b>	••••••••••••••••••••••••••••••••••••••
USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
First Name	Last Name	Bar Number	FILTER RESET		ADD ATTORNEY
First Name	Middle Name	Last Name	Bar Number		Actions
Abby		Carmichael	123		1
Perry		Mason	123		1
Jack		Stone	123		1
Previous 1 Next					3 Results Page 1 of

Figure 6.6 – Attorneys Page



The New Attorney section is displayed.

First Name	Middle Name	Last Name	Bar Number		Actions
New Attorney				ø	Î
Bar Number \star					
Bar Number is Required.					
First Name \star	Middle Name		Last Name 🔺		
First Name is Required.			Last Name is Required.		
				CANCEL	SAVE

Figure 6.7 – New Attorney Section

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



### Editing a Firm Attorney's Information

To edit a firm attorney's information:

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

The Attorneys page is displayed.

≡ 🐝 eFile Attorneys				<b>?</b> - ⊕-	•	Interaction (1998)
USERS		ATTORNEYS	PAYMENT ACCOUNTS			FIRM DETAILS
irst Name	Last Name	Bar Number	FILTER RESET			
First Name	Middle Name	Last Name	Bar Number			Actions
Abby		Carmichael	123			1
Perry		Mason	123			1
Jack		Stone	123			1
Previous 1 Next						3 Results Page 1 o

SAVE

Figure 6.8 – Attorneys Page

- Locate the attorney for whom you want to change the information, and then click
   The information for the specified attorney is displayed.
- 3. Update the necessary information, and then click

### Removing an Attorney from the Firm

To remove an attorney from the firm's list:

1. On the Dashboard menu, click Firm Attorneys.

The Attorneys page is displayed.

≡ 🐝 eFile Attorneys				₽- ⊕-	<b></b> -	2 maari.compana.com
USERS		ATTORNEYS	PAYMENT ACCOUNTS			FIRM DETAILS
First Name	Last Name	Bar Number	FILTER RESET			
First Name	Middle Name	Last Name	Bar Number			Actions
Abby		Carmichael	123			1
Perry		Mason	123			1
Jack		Stone	123			1
Previous 1 Next						3 Results Page 1 of 1

Figure 6.9 – Attorneys Page

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

The warning message is displayed: Are you sure you want to delete attorney "xyz"?

Click OK to remove the attorney from the firm, or click Cancel to cancel the action.
 If you clicked OK, a confirmation message is displayed, and the attorney is removed from the firm.

# 7 Payment Accounts

#### Topics covered in this chapter

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

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

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

# Adding a Waiver Payment Account

To set up a waiver payment account:

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

The Payment Accounts page is displayed.

E 🐝 eFile Payment Accounts			Ø-	• • •	<b>.</b>
USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
ccount Name	Account Type Select	Account Status     Select	• FILTER RESET		
Payment Account Name	Payment Account Type	Status	Last 4 Digits		Actions
Firm's CC	Credit Card	Active	5454		1
Mary Ann's Waiver	Waiver	Active			1
New Mastercard	Credit Card	Active	5454		1
Previous 1 Next					3 Results Page 1 d
	N				



2. Click

A new pane is displayed.

Payment Account Name	Payment Account Type	Status	Last 4 Digits	Actions
		Active		
Account Name *	Create a new: Waiver O Credit Card or Bank Account	ı		
Account Name is Required.				
				CANCEL CREATE WAIVER
Waiver	Waiver	Active		1
First Previous 1 Next Last				1 Result(s) Page 1 of 1

CREATE WAIVER

Figure 7.2 – New Payment Account Window

- 3. Type a name for the payment account in the **Account Name** field.
- 4. Select the Waiver option, and then click

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

# Adding a Credit Card Payment Account

To set up a credit card payment account:

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

The Payment Accounts page is displayed.

eFile Payment Accounts			(? 	• +	<b></b> -	• • • • • • • • • • • • • • • • • • •
USERS		ATTORNEYS	PAYMENT ACCOUNTS			FIRM DETAILS
punt Name	Account Type Select	Account Status     Select	• FILTER RESET			
ayment Account Name	Payment Account Type	Status	Last 4 Digits			Actions
irm's CC	Credit Card	Active	5454			1
fary Ann's Waiver	Waiver	Active				1
lew Mastercard	Credit Card	Active	5454			1
Previous 1 Next						3 Results Page 1

Figure 7.3 – Payment Accounts Page



A new pane is displayed.

Payment Account Name	Payment Account Type	Status	Last 4 Digits	Actions
		Active		
Account Name *	Create a new: Waiver O Credit Card or Bank Account	unt		
Account Name is Required.				
				CANCEL CREATE WAIVER
Waiver	Waiver	Active		1
First Previous 1 Next Last				1 Result(s) Page 1 of 1

Figure 7.4 – New Payment Account Window

- 3. Type a name for the payment account in the **Account Name** field.
- 4. Select the Credit Card or Bank Account option, and then click

ENTER INFORMATION

The Enter Information window is displayed.

Enter Info	rmation	×
🔆 tyl	er	
Paymen	t Information	
	Method of Payment Credit Card e-Check	

Figure 7.5 – Enter Information Window

5. Select the Credit Card option.

The Payment Information pane is displayed.

Enter Inf	formation	>
🔨 tv	vler	
	technologies	
Payme	ent Information	
	Method of Payment	
	Credit Card	
	e-Check	
	Cardholder Information Enter the information as it appears on the Cardholder Account. The fields marked with a red asterisk (*) are required fields.	
	Card Type 🔹 🔹	
	Card Number *	
	Exp Month MM * Exp Year YYYY *	
	CVV Code * CVV Help	
	*	
	Name on Card Maximum of 30 characters	
	Address Type 💿 US 🔍 Foreign	
	Address Line 1	
	Street address, P.O. box, company name, c/o	
	Address Line 2 Apartment, suite, unit, building, floor, etc.	
	City	
	State 🔻 *	
	Zip Code *	
	Continue	

Figure 7.6 – Payment Information Pane

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

Continue

13. After completing all of the required fields, click

The Verify Billing Information pane is displayed.

Enter Information	×
Verify Billing Information	
Card Number Exp Date CVV Code Name on Card Address Type Address Line 1 Address Line 2	*** Joe Smith US 123 Main St. Plano TX
Terms and Conditions This is a confidential and secure site that doe third parties. By setting up this account you a conditions.	

Figure 7.7 – Verify Billing Information Pane

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

click

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

## Adding an E-Check Payment Account

To set up an e-check payment account:

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

The Payment Accounts page is displayed.

	ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
Select	Account status     Select	FILTER RESET		ADD ACCOUN
Payment Account Type	Status	Last 4 Digits		Actions
Credit Card	Active	5454		1
Waiver	Active			1
Credit Card	Active	5454		1
Credit Card	Active	5454		3 Results
	Payment Account Type Credit Card Waiver	Select     Select       Payment Account Type     Status       Credit Card     Active       Waiver     Active	Select     e     FLIER     RESET       Payment Account Type     Status     Last 4 Digits       Credit Card     Active     5454       Waiver     Active     Keits	Select     Select     FILTER     RESET       Payment Account Type     Status     Last 4 Digits       Credit Card     Active     5454       Waiver     Active     Active

Figure 7.8 – Payment Accounts Page



A new pane is displayed.

Payment Account Name	Payment Account Type	Status	Last 4 Digits	Actions
		Active		
Account Name * Account Name is Required.	Create a new: Waiver O Credit Card or Bank Account	đ		
				CANCEL CREATE WAIVER
Waiver	Waiver	Active		1
First Previous 1 Next Last				1 Result(s) Page 1 of 1

Figure 7.9 – New Payment Account Window

- 3. Type a name for the payment account in the **Account Name** field.
- 4. Select the Credit Card or Bank Account option, and then click

ENTER INFORMATION

The Enter Information window is displayed.



Figure 7.10 – Enter Information Window

5. Select the e-Check option.

The Payment Information pane is displayed.

Enter Information	×
Payment Information Method of Payment © credit Card @ e-Check	
Account Holder Informatic Enter the information as it app are required fields.	on pears on the Account. The fields marked with a red asterisk (*)
Account Type	*
Account Number	*
Routing Number	* Routing Number Help
Name on Account	Maximum of 30 characters
Address Type	🖲 US 🔘 Foreign
Address Line 1	* Street address, P.O. box, company name, c/o
Address Line 2	Apartment, suite, unit, building, floor, etc.
City	*
State	*
Zip Code	*
	Continue

Figure 7.11 – Payment Information Pane

- 6. Select the account type from the Account Type drop-down list.
- 7. Type your account number in the Account Number field.
- 8. Type the bank routing number in the **Routing Number** field.
- 9. Type your name in the Name on Account field.
- 10. Select the address type, and then complete the required address fields.

Continue

11. After completing all of the required fields, click

The Verify Billing Information pane is displayed.

Enter Info	rmation	×
te	ler chronogies illing Information	
	Billing Detail Account Type Account Number Routing Number Name on Account Address Type Address Line 2	****5678 113000023 Joe Smith US 123 Main St. Plano TX 75024 disseminate confidential information to

Figure 7.12 – Verify Billing Information Pane

12. Review the information you have entered. If it is correct, click Save Information . If it is not correct,

click and make any necessary changes.

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

## **Editing a Payment Account**

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

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

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

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

The Payment Accounts page is displayed.

	ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
Select	Account status     Select	FILTER RESET		ADD ACCOUN
Payment Account Type	Status	Last 4 Digits		Actions
Credit Card	Active	5454		1
Waiver	Active			1
Credit Card	Active	5454		1
Credit Card	Active	5454		3 Results
	Payment Account Type Credit Card Waiver	Select     Select       Payment Account Type     Status       Credit Card     Active       Waiver     Active	Select     e     FLIER     RESET       Payment Account Type     Status     Last 4 Digits       Credit Card     Active     5454       Waiver     Active     Keits	Select     Select     FILTER     RESET       Payment Account Type     Status     Last 4 Digits       Credit Card     Active     5454       Waiver     Active     Active

Figure 7.13 – Payment Accounts Page

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

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

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

type the new name. Then, click

SAVE

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

4. To return the payment account to active status, click

an an

, and then select the **Active** check box.

Then, click

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

SAVE

## **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 Firm Payment Accounts.

The Payment Accounts page is displayed.

E 🀝 eFile Payment Accounts				ଡ- ⊕- Ⅲ-	±
USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
ccount Name	Account Type Select	¢ Account Status	• FILTER RESET		ADD ACCOUNT
Payment Account Name	Payment Account Type	Status	Last 4 Digits		Actions
Firm's CC	Credit Card	Active	5454		1
Mary Ann's Waiver	Waiver	Active			1
New Mastercard	Credit Card	Active	5454		1
Previous 1 Next					3 Results Page 1 of

Figure 7.14 – Payment Accounts Page

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

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

3. Click oκ to delete the account, or click cancel to cancel the action.
 If you clicked oκ , a confirmation message is displayed, and the account is deleted.

# 8 Case Initiation

#### Topics covered in this chapter

- Starting a New Case Filing
- Uploading Documents for a New Case Filing
- Entering Case Information
- Collecting Address Information at the Case Level
- Entering Case Information for a Civil Case
- Filing a New Case with Case Cross References
- Filing a New Case with a Will Filed Date
- Entering Party Details
- Entering Date of Death on Parties Page
- Entering Filing Details
- Capability for Filing a Return Date
- Selecting a Return Date for a Case Filing
- Reverify the Return Date
- Reverifying a Return Date
- Capability for Filing Hearing Date
- Scheduling a Hearing Date for a New Case Filing
- Scheduling a Hearing for an Existing Case Filing
- Entering a Filing with an Ad Damnum Amount
- Entering a Filing with a Motion Type Code
- Entering a Filing with a Claim Amount
- Entering a Filing with an Estate Value
- Entering Payment Information
- Entering Payment Information for Per-Page Optional Service Fee
- Submission Agreements
- Viewing the Envelope Summary
- Viewing Case Address Information on the Summary Page

START FILING

You can initiate a case from the *Dashboard* page by clicking . This action begins the case initiation process for e-filing. From here, you can start a new case or file into an existing case.

Note: While you are entering a case filing, click

to view the case number or draft number.

≡ 🐝 efile Dashboard 🕹 - ∰- III- 💄					
Start Filing	Filing History	Drafts			
Click on START FILING to select your filing options. You could initiate a case or file into an existing case.	Envelope # 165149 Envelope # 165149 Submitted at 01/24/2020 9:22 AM Filings: Submitted (1)	Draft # 9063 Draft # 9063 Started at 01/22/2020 3:55 PM			
	Envelope # 745447	Draft # 9062 Draft # 9062 Started at 01/22/2020 3:54 PM			
	Envelope # 745447 Submitted at 12/16/2019 4:54 PM Filings: Submitted (1)	Draft # 9060 Draft # 9060 Started at 01/22/2020 1:42 PM			
	Case # cc-15-1813 Envelope # 157230 Submitted at 11/05/2019 9:06 PM Filings: Accepted (1)				
START FILING	View Filing History	View My Drafts			
Case Search Q	Bookmarks	Templates			
	<b>CC-15-1813 - ********</b> OFS QA 2017				
	CC-19-3942 - b b v. a a OFS QA 2017 - Court at Law				
	CC-15-230 File and Serve				
Search Cases	View My Bookmarks	View My Templates			

START FILING

Figure 8.1 – 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.

EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	•	<b>1</b>
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Lootor * Select				
Location is Required.				
← DASHEDARD				
6				
*9				
				D Help

Figure 8.2 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

EFILE QA 01 Start Filing	<b>∂</b> - ⊕- <u>Ⅲ</u> - <u>▲</u>
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Location * OFS MockCMS =	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHBOARD	
6	
	() Help
Figure 9.2 Stort Filing Page with Coop Paper Di	anloyed

Figure 8.3 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Upload Documents page is displayed.

## Uploading Documents for a New Case Filing

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

To upload your documents:

1. Click to look for the documents that you want to upload on the *Upload Documents* page.

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

Note: While you are entering a case filing, click number.

to view the case number or draft

=- 🌾 EFILE QA. 01 Upload Documents - Draft # 599 0 -	<b>?</b> -	<b>.</b> -	<b></b> -	• •
Documents Case Parties Filings Service Fees Summary				
Drag files here or BROWSE				
Castmum Filesize: 50.00 MB Supported File Types: TIFF Files (TIFF TIF) WordPerfect File (WPD) Word 2007 File (DOCX) Word 97/XP File (DOC) Portable Document File (PDF) XML Document (XML) Windows Media File (WMV) MPEG (MPEG).				
SAVE AND EXIT				CASE INFORMATION ->



2. Select each document to be uploaded.

CASE INFORMATION ->

3. Click to continue with your filing.

The Case Information page is displayed.

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

## **Entering Case Information**

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

≡ 🀝 EFILE QA 01 Case Information - Draft # 244 0 -		<b>∂</b> - ⊕- <b>Ⅲ- ≜</b>	-
Documents         Case         Parties         Filings         Service         Fees         Summary			
Location * OFS MockCMS Case Type *	•	Case Category * Select Case Category is Required.	•
Select Case Type is Required.	•	PARTIES	<b>→</b>

Figure 8.5 – Case Information Page

Note: At any time while the Case Information page is displayed, you can click

UPLOAD DOCUMENTS

to begin uploading your documents. You will be prompted to upload your documents when you are entering information on the *Filings* page.

to view the case number or draft number.

#### Note: While you are entering a case filing, click

To enter case information:

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

4. Click to save your work and continue, or click SAVE AND EXIT to save your work and exit the 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: This feature is configured by Tyler and may not be available on your system.

=- ♦ EFILE QA 01 Case Information - Draft # 621 0 -			<b>@</b> -	<b>.</b> -	<b></b> -	L
Documents         Case         Parties         Filings         Service         Fees	Summary					
Location * OFS QA 2017	\$	Case Category * Civil				\$
Case Type * Notice Of Removal	•					
Procedures / Remedies SELECT		Select				\$
Case Address						
Country * United States  Address Like 1 *						
Address Line 1 is Required.						
City *	State * Select	\$	Zip Code \star			
City is Required.	State is Required.		Zip Code is Required.			
County *						
County is Required.						
UPLOAD DOCUMENTS SAVE AND EXIT						Parties >

Figure 8.6 – Sample Case Information Page—Case Address Pane Blank

Note: At any time while the Case Information page is displayed, you can click

← UPLOAD DOCUMENTS

to begin uploading your documents. You will be prompted to upload your documents when you are entering information on the *Filings* page.

#### Note: While you are entering a case filing, click



to view the case number or draft number.

#### To collect address information at the case level:

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

EFILE QA 01 Case Information - Draft # 621				e	•	••	<b></b> -	
Ocuments Case Parties Filings Service	ce Fees Si	mmary						
ocation *			Case Category 🔺					
OFS QA 2017			Civil					•
але Туре 🕷								
Notice Of Removal								
rocedures / Remedies			Damage Amount					
SELECT			Select					:
Case Address								
Country 🗱								
United States	*							
Address Line 1 * 555 Main Street								
City *	State *			Zip Code *				
Dallas	Texa	s		\$ 75220				
County *								
Dallas								
UPLOAD DOCUMENTS SAVE AND EXIT								PARTIES -



## **Entering Case Information for a Civil Case**

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

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

Note: At any time while the Case Information page is displayed, you can click

← UPLOAD DOCUMENTS

to begin uploading your documents. You will be prompted to upload your documents when you are entering information on the *Filings* page.

Note: While you are entering a case filing, click



to view the case number or draft number.

To enter case information:

1. On the Case Information page, select Civil from the Case Category drop-down list.

Documents	Case	Parties	Filings	Service	Fees	Summary	$\rangle$		
Location * OFS MockCMS	S						\$	Case Category *	•
Case Type <b>*</b> Select							\$	Case Sub Type Select	\$
Procedures / Remedies								Damage Amount Select	¢
	MENTS	SAVE AND EXI	т						PARTIES >

Figure 8.8 – Case Information Page

- 2. Select the case type from the Case Type drop-down list.
- 3. Select the case subtype, if applicable, from the Case Sub Type drop-down list.



The Select Procedures / Remedies window is displayed.

Select Proce	dures / Remedies	
Select	Procedure / Remedy	
	Appeal	
	Class Action	
	Garnishment	
		CANCEL SAVE

Figure 8.9 – Select Procedures / Remedies Window

5. Select the appropriate Procedure / Remedy, and then click



SAVE

Documents Case Parties Filings Service Fees Summary		
Location * OFS MockCMS	Case Category * CiVil	\$
Case Type <b>★</b> Damages - \$10.50	Case Sub Type Select	\$
Procedures / Remedies SELECT Class Action	Damage Amount Over \$5000	÷
← UPLOAD DOCUMENTS SAVE AND EXIT	La	PARTIES ->

Figure 8.10 – Sample Completed Case Information Page

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

## Filing a New Case with Case Cross References

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

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

EFILE QA 01 Case Information - Draft # 244	<b>⊙</b> - ⊕- <u>Ⅲ</u> - <b>⊥</b>
Documents         Case         Parties         Filings         Service         Fees         Summary	
Location # OFS MockCMS #	Case Category #  Case Category is Required.
Case Type #	
Case Type is Required.	
← UPLOAD DOCUMENTS SAVE AND EXIT	PARTIES →



To file a new case that uses case cross references:

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

C

Documents Case Parties Filings Service Fees Summary			
Location # OFS QA 2017	\$	Case Category * Crivil	\$
Cese Type ♥ City Ordinance Cases - \$10.50	¢	Case Sub Type Select	\$
Procedures / Remedies SELECT		Damage Amount Select	\$
			ADD CASE CROSS REFERENCE
Case Cross Reference Type	Case Cross Refere	nce Id	Action
* Warrant Number (CM) +			
	Cross Reference T	ype "Warrant Number" is required and must be 6 numbers long	
* Warrant Number (CM) +			
	Cross Reference T	ype "Warrant Number" is required and must be 6 numbers long	
← UPLOAD DOCUMENTS SAVE AND EXIT			Parties ->

Figure 8.12 – Sample Case Information Page with the Case Cross Reference Type Section Displayed

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

A blank row in the Case Cross Reference Type section is displayed.

7. Select the appropriate option from the **Case Cross Reference Type** drop-down list. Then, type the sixdigit case cross reference number in the **Case Cross Reference Id** field.

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

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

Documents Case Parties Filings Service Fees Summary		
Location *	Case Category *	
OFS QA 2017	• Civil	\$
Сазе Туре 🖈	Case Sub Type	
City Ordinance Cases - \$10.50	♦ Select	\$
Procedures / Remedies SELECT	Damage Amount Select	\$
		0
		ADD CASE CROSS REFERENCE
Case Cross Reference Type	Case Cross Reference Id	Action
* Warrant Number (CM)	123456	
* Warrant Number (CM)  e	345678	
Case Cross Reference Number	124567	Î
Uniform Case Number	567432	<b>1</b>
← UPLOAD DOCUMENTS SAVE AND EXIT		PARTIES →

Figure 8.13 – Example of a Case Information Page with Case Cross Reference Numbers Added



## Filing a New Case with a Will Filed Date

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

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

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

START FILING

1. On the *Dashboard* page, click

The Start Filing page is displayed.

= 🀝 EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	<b></b> -	≜
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loaton * Select •				
Location is Required.				
← DASHBOARD				
5				
				O Help

Figure 8.14 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

EFILE QA 01 Start Filing	Ø• ⊕• Ⅲ• ≜
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
OFS MockCMS =	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHBOARD	
Ca	
	() Help
Eiguro 8 15 – Stort Filing Page with Case Papes I	Dieployed

Figure 8.15 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Upload Documents page is displayed.

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

🚍 · 🤸 εFRLE GA 611 Uplead Documents - Draft # 599 🕕 ·	<b>?</b> -	<b>.</b>	<b></b> -	
Documents         Case         Parties         Filings         Service         Fees         Summary				
Chang files here or BROWSE				
U. Maximum Fielize: 50.00 MB Supported File Types: TEF Files (TIFF TIE) WordPerfect File (WPD) Word 2007 File (DOCX) Word 97/XP File (DOC) Portable Document File (PDF) XML Document (XML) Windows Media File (WMV) MPEG (MPEG).				
SAVE AND EXIT				CASE INFORMATION →



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

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

5. Select each document to be uploaded.

CASE INFORMATION ->

6. Click

to continue with your filing.

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

The Case Information page is displayed.

≡ 🐝 Case Information - Draft # 9006 🕕 ·	<b>0</b> ∗ ⊕∗ <b>Ⅲ</b> ∗ <b>≜</b>
Documents Case Parties Filings Service Fees Summary	
Location # OFS MockCMS ¢	Case Casegory * Probate or Mental Health  e
Case Type * Probate of Will e	Case sub Type Select. •
Will Field Date *	-
01/10/2020	
← UPLOAD DOCUMENTS SAVE AND EXIT	PARTIES →

Figure 8.17 – Example of the Will Filed Field on the Case Information Page

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

Note: In the example, "Probate or Mental Health" is selected.

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

Note: In the example, "Probate of Will" is selected.

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

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

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

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

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



# **Entering Party Details**

Each case requires a party type.

Documents Case Partles	Filings Service	Fees Summary				
Party Type	Required Party	Party Name		Lead Attorney		Actions
Defendant	This is a required Party					<b>A</b>
Personal 🛕 Address	Additional Identifiers					Hide Details
Party Type Defendant						
Personal Information						
First Name 🕷		Middle Name		Last Name 🕷	Suttix Select	۰
First Name is Required.				Last Name is Required.		
Party CMS ID		Select	٥			
Attorney Information						
ADD/EDIT ATTORNEYS						GO TO ADDRESS
Plaintiff	This is a required Party					<b>A</b>
					6	add party
CASE INFORMATION SAVE AND	EXIT					FILINGS →

Figure 8.18 – Personal Tab on the Parties Page

### Note: While you are entering a case filing, click

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

- 1. On the Personal tab, select Person or Entity.
- 2. 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.
- 3. Type the party case management system ID in the Party CMS ID field, if appropriate.
- 4. Select a language from the **Interpreter** drop-down list, if appropriate.

ADD/EDIT ATTORNEYS

5. Click

to select the filing attorney.

The Attorneys window is displayed.

to view the case number or draft number.

Attorneys	Lead Attorney		
First Name	Last Name	Bar Number	FILTER
			RESET
Add	Name	Bar Number	
	Abby Carmichael	123	
	Perry Mason	123	
	Jack Stone	123	
Previous 1	Next		3 Result(s) Page 1 of 1
		CAN	CEL LEAD ATTORNEY



- 6. Select the lead attorney for the first party on the case.
- 7. Select the additional attorneys for the case, and then click

LEAD ATTORNEY

The *Lead Attorney* window is displayed with the attorneys that you selected. The lead attorney is indicated.

Attorneys	Lead Attorney	•
Remove	Name	Lead Attorney
$\checkmark$	Abby Carmichael	0
$\checkmark$	Perry Mason	•
ATTORNEYS	3	CANCEL SAVE





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



to enter the address information for the first party.

Party Type	Required Party	Party Name	Lead Attorney	Actions
Defendant	This is a required Party	Eleanor Defendant	Perry Mason	1
Plaintiff	This is a required Party	Thomas Plaintiff	Sam Smith	Ø
Personal Addre	Additional Identifiers			Hide Details
Country United States Address Line 1		÷	Address Line 2	
City		State Select Phone Number	Zp Code	
				GO TO ADDITIONAL IDENTIFIERS

Figure 8.21 – Address Tab on the Parties Page

10. Enter the country, address, city, state, ZIP code, and phone number for the first party.

11. Click	GO TO ADDITIONAL ID		add more information for the specified party.	
Party Type	Required Party	Party Name	Lead Attorney	Actions
Defendant	This is a required Party	Eleanor Defendant	Perry Mason	1
Plaintiff	This is a required Party	Thomas Plaintiff	Sam Smith	/
Personal	Address Additional Identifiers			Hide Details
Date of Birth MM/DD/YYYY				
Figure 8	.22 – Additional Ider	tifiers Tab on	the Parties Page	
12. Type calen 13. Click	dar.		<b>f Birth</b> field, or click to select the date from the the required party.	
14.Comp	plete all of the require	d fields for the s	second party.	
	have another party to been added to the ca FILINGS →		e, click ADD PARTY. Continue to add parties until a	ll parties
16. Click		/e your work an	nd to continue.	
time. To	resume filing a save	ed draft, naviga	an stop working on the filing and resume work at a tate to the <i>Dashboard</i> page. In the Drafts pane, clic	
My Draft	s. Locate the specif	ed draft, and t	nen Click	

## Entering Date of Death on Parties Page

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

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

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

Documents Case Parties	Filings Service Fe	es Summary			
Party Type	Required Party	Party Name	Lead Attorney		Actions
Defendant	This is a required Party				🔺 🗹
Personal 🛕 Address	Additional Identifiers				Hide Details
Party Type Defendant					
Personal Information					
Forson     First Name *		Middle Name	Latt Name *	Select	\$
First Name is Required.			Last Name is Required.		
Party CMS ID		interpreter	•		
Attorney Information					
ADD/EDIT ATTORNEYS					GO TO ADDRESS
Plaintiff	This is a required Party				▲ 🖉
					ADD PARTY
← CASE INFORMATION SAVE AND EXI	т				FILINGS →

Figure 8.23 – Example of the Personal Tab on a Parties Page

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

1. On the Dashboard page, click

The *Start Filing* page is displayed.

START FILING

= 🎪 EFILE QA 01 Start Filing	8-	<b>.</b>	•	2 martingane me -
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Lozeton * Select ÷				
Location is Required.				
←DASHBOARD				
·v				
				D Help

Figure 8.24 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

= 🤹 EFILE QA 01 Start Filing	<b>0</b> - ⊕- <b>Ⅲ</b> - <b>≜</b>
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Loodor * OFS MockCMS =	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHEQARD	
C3	
	Q Help
Eiguro 9.25 – Start Filing Page with Case Papes I	Diaplayad

Figure 8.25 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Upload Documents page is displayed.

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

🚍 - 🤸 EFILE GA 01 Upload Documents - Draft # 599 🕜 -	<b>?</b> -	<b>.</b>	<b></b> -	
Documents         Case         Parties         Filings         Service         Fees         Summary				
Drag files here or     BROWSE				
u Maximum Flesze: 50.00 MB Supported File fype: TFF Filey (TFF TIF) WordParfect File (WPD) Word 2007 File (DOCX) Word 97/XP File (DOC) Portable Document File (PDF) XML Document (XML) Windows Media File (WMN) MPEG (MPEG).				
заррона тистра, не тако (нет тер инанения тис (ита) ина доог тис (ось), ина и лик тис (ос.) симан осанина тис (тит / лик осанина (лик), инания мина тис (инт у лите и (ите у).				
SAVE AND EXIT				CASE INFORMATION ->

Figure 8.26 – Upload Documents Page

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

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

5. Select each document to be uploaded.

CASE INFORMATION ->

6. Click

12. Click

to continue with your filing.

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

The Case Information page is displayed.

- 7. Complete the required sections on the Case Information page, and then click
- 8. Select the Person or Entity option.

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

- 9. 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.
- 10. Type the party case management system ID in the Party CMS ID field, if appropriate.
- 11. Select a language from the Interpreter drop-down list, if appropriate.



to select the filing attorney.

The Attorneys window is displayed.

PARTIES -

Attorneys	Lead Attorney		
First Name	Last Name	Bar Number	FILTER
			RESET
Add	Name	Bar Number	
	Abby Carmichael	123	
	Perry Mason	123	
	Jack Stone	123	
Previous	1 Next		3 Result(s) Page 1 of 1
		CANCE	LEAD ATTORNEY



- 13. Select the lead attorney for the first party on the case.
- 14. Select the additional attorneys for the case, and then click

The Lead Attorney window is displayed with the attorneys that you selected. The lead attorney is
indicated.

LEAD ATTORNEY

Attorneys	Lead Attorney	
Remove	Name	Lead Attorney
$\checkmark$	Abby Carmichael	0
~	Perry Mason	•
ATTORNEYS		CANCEL SAVE





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



to enter the address information for the first party.

Party Type	Required Party	Party Name	Lead Attorney	Actions
Defendant	This is a required Party	Eleanor Defendant	Perry Mason	ø
Plaintiff	This is a required Party	Thomas Plaintiff	Sam Smith	ø
Personal Addre	Additional Identifiers			Hide Details
Country United States Address Line 1		÷	Address Line 2	
City		State Select	Zp Code	
		Phone Number 🚯		GO TO ADDITIONAL IDENTIFIERS

Figure 8.29 – Example of the Address Tab on a Parties Page

17. Complete the required fields on the Address tab, and then click

GO TO ADDITIONAL IDENTIFIERS

≡ 🐝 Parties - Draft # 90	DO6 🕕 -				<b>?</b> -	<b>-</b>	•	
Documents Case	Parties Filings Servi	ice Fees Summary						
Party Type	Required Party	Party Name		Lead Attorney				Actions
Petitioner	This is a required Party	John Doe		Perry Mason				ø
Personal Address	Additional Identifiers							Hide Details
Date of Birth 04/15/1980	8	Date of Death ★ 01/02/2020	t					
Respondent		Mary Smith		Tim Cook				1
								ADD PARTY
← CASE INFORMATION	SAVE AND EXIT							FILINGS →

Figure 8.30 – Example of the Additional Identifiers Tab on a Parties Page (Includes the Date of Death Field)

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

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

- 21. Complete all of the required fields for the second party.
- 22. If you have another party to add to the case, click

Continue to add parties until all parties



have been added to the case.

to save your work and to continue.

23. Click

## **Entering Filing Details**

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

≡ 🐝 Filings - Draft # 6703 ा -					Ø- ⊕·	<b></b> -	
Documents Case Parties	Filings Service Fees Summary						
Filing Code	Client Ref #	Filing	ng Description				Actions
							🔺 🗹 🚺
Details 🛕 Optional Services	Communication						Hide Details
Filing Type *		•	Filing Code * Select				•
		-	Filing Code is Required.				
Filing Description				Client Reference Number			
Comments to Court							
							li
							GO TO OPTIONAL SERVICES
Filing on behalf of 🚯							
ASSOCIATED PARTIES							
Upload Documents*							
Select a filing code before uploading docu	uments.				R		
					La"		ADD FILING
← PARTIES SAVE AND EXIT						5	

Figure 8.31 – 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. Select the filing type from the Filing Type drop-down list.
- 2. Select the filing code from the Filing Code drop-down list.
- 3. Type a description in the Filing Description field.
- 4. Type a client reference number in the **Client Reference Number** field.
- 5. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
- 6. if you need to apply any optional services for the filing, click

GO TO OPTIONAL SERVICES

The **Optional Services** tab is displayed.

ot Selected		Selected
ro Fee Service	\$1	$\rightarrow$
lit Fee Service	\$10	→
rtified Copies	?? × \$5	$\rightarrow$
r Page Fee Service	₩ x	$\rightarrow$
ce Per Party	\$10	$\rightarrow$
ority Processing	?? × \$4	$\rightarrow$
ceholder Service 1		→ →
iceholder Service 2 with a long description to tr rizontal scrolling	igger	→
aceholder Service 3		$\rightarrow$
ceholder Service 4		$\rightarrow$
GA Decline Error	\$280	$\rightarrow$
oken Fee	\$10	$\rightarrow$
r Page Fee No Multiplier		→

Figure 8.32 – Sample Optional Services Tab

7. To select the applicable optional services, click

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

⇒

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

GO TO COMMUNICATION

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

9. Click

to associate parties with the filing.

Associate Partie	es to this Filing				
First Name	Last Name	Entity	Party Type Select	➡ FILTER RESET	
Select	Party Name			Party Type	
	Phil Defendant			Defendant	
	Susan Plaintiff			Plaintiff	
Previous 1 Next					2 Result(s) Page 1 of 1
					CANCEL SAVE

The Associate Parties to this Filing window is displayed.



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

- 11. Select the relationship of the party from the **Party Type** drop-down list.
- 12. Select the check box for the party to which the associated party should be connected.



14. In the Upload Documents pane, click

ADD DOCUMENTS

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

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

Upload Documents*			
Component Name	Actions	Description	Security
Lead Document	ADD DOCUMENTS	This document is required.	
Attachments	ADD DOCUMENTS		

Figure 8.34 – Upload Documents Pane

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ 🗊			
	Drag files here or	BROWSE		
Maximum Filesize: 50.00 MB				
Supported File Types: TIFF Files (	, , , , ,	· · · ·	,	) Portable
upported File Types: TIFF Files ( ocument File (PDF) XML Docum	, , , , ,	· · · ·	,	) Portable

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

Figure 8.35 – Select document(s) for Lead Document Window

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

15. Click to select the lead document if a document has already been uploaded. Click	BROWSE
to look for a document to upload or to locate additional lead documents.	
Note: If you want to delete a document that you previously uploaded, click	

16. After you have added all of your lead documents, click
17. If you have attachments to add to the filing, click in the <b>Attachments</b> section.
18. If you want to add security to any of the documents, select an option from the <b>Security</b> drop-down list.
19. If you want to add another filing, click . Then, repeat the same steps for the next filing.
20. After you have added all of the filings, click either or SKIP TO FEES .

# Capability for Filing a Return Date

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

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

Return Date	
Out Of State Service	
Return Date	
	Direction of the second
Return date must be verified.	



VERIFY

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

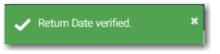


Figure 8.37 – Return Date Verified Message

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

Return Date Out of State Service		
Return Date 04/06/2020	ė	VERIFY

#### Figure 8.38 – Sample Return Date Pane with Valid Date Displayed

If you select an invalid return date, an error message is displayed.

Return Date Out of State Service	
Return Date 01/13/2020	tim VERIFY
Return Date must be on or after 04/06/2020.	
Return date must be verified.	

Figure 8.39 – Return Date Pane with Error Message Displayed

# Selecting a Return Date for a Case Filing

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

To select a return date for a case filing:

START FILIN	1
	1
OTANT FIELD	

1. From the *Dashboard* page, click

≡ 🐝 eFile Dashboard		<b>0</b> - ⊕- Ⅲ- <b>1</b> -
Start Filing	Filing History	Drafts
Click on START FILING to select your filing options. You could initiate a case or file into an existing case.	Envelope # 165149 Envelope # 165149 Submitted at 01/24/2020 9:22 AM Filings: Submitted (1)	Draft # 9063 Draft # 9063 Started at 01/22/2020 3:55 PM Draft # 9062
	Envelope # 745447 Envelope # 745447 Submitted at 12/16/2019 4:54 PM Filings: Submitted (1)	Draft # 9062 Draft # 9062 Started at 01/22/2020 3:54 PM Draft # 9060 Draft # 9060 Started at 01/22/2020 1:42 PM
	Case # cc-15-1813 Envelope # 157230 Submitted at 11/05/2019 9:06 PM Filings: Accepted (1)	Uratt # 9000 Statieu al 01722/2020 1.42 P.M
START FILING	View Filing History	View My Drafts
Case Search Q	Bookmarks	Templates
	<b>CC-15-1813 - ********</b> OFS QA 2017	
	CC-19-3942 - b b v. a a OFS QA 2017 - Court at Law	
	CC-15-230 File and Serve	
Search Cases	View My Bookmarks	View My Templates

Figure 8.40 – Dashboard Page

The *Start Filing* page is displayed.

EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	•	<b>1</b>
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Lootor * Select				
Location is Required.				
← DASHEDARD				
6				
*9				
				D Help

Figure 8.41 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

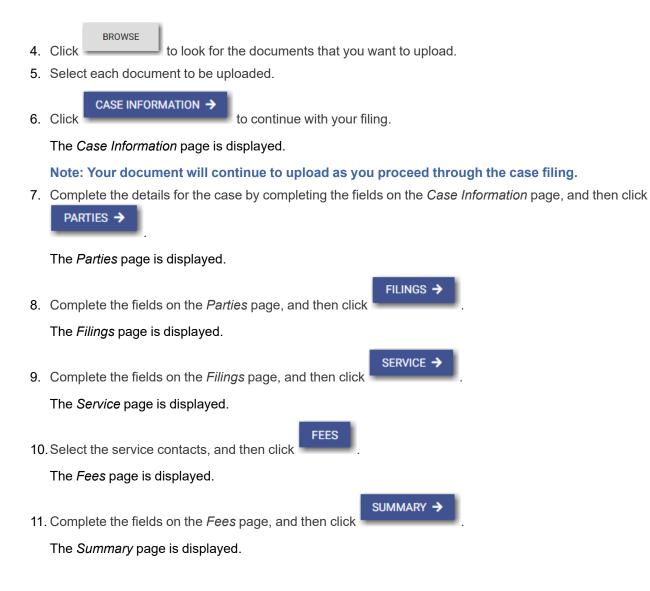
EFILE QA 01 Start Filing	<b>⊙</b> • ⊕• Ⅲ• <b>⊥</b>
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Control * OFS MockCMS *	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHBOARD	
¢	
igure 9.42 Stort Filing Dage with Case Dance D	О Нер

Figure 8.42 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Upload Documents page is displayed.



eturn Date					
Y State Service	D				
n Date				Return Date	
		T VERIFY		Agreements	
turn date must be verified.				Case	
				Parties	
ubmission Agreements				Filings Service	
ase				✔ Fees	
son 5 MackCMS	Contegery		Tron Malpractice	SUBMIT	
arties				Score Al	
£2				Calculating Fees	
lings				1	
sing Type File Only	Ring Code Acknowledgement	Client Ref #	Filing Description		
omponent	Document Name	Description	Security		
Lead Document Driventeed Version Driginal	redactthis.pdf	Acknowledgement			
unginal					
ervice				1	
n.0					
ne					
es				*	
ant Account In Payment	Pring Amorey Perry Mason	Party Responsible for Face ABC Company	Plan Type Default		

Figure 8.43 – Return Date Pane on the Summary Page

12. 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.

Return Date		
Out Of State Service		
Return Date		
04/10/2020	<b></b>	VERIFY

Figure 8.44 – 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.





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.

Return Date Out of State Service		
Return Date 04/06/2020	Ì	VERIFY

Figure 8.46 – Sample Return Date Pane with Valid Date Displayed

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

## **Reverify the Return Date**

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

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

## **Reverifying a Return Date**

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

To reverify the return date:

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.

Return Date		
Out Of State Service		
Return Date		
04/10/2020	<b></b>	VERIFY
Return date must be verified.		

#### Figure 8.47 – Return Date Pane

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

## Capability for Filing Hearing Date

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

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

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

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

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

🔆 📲	Schedule Hearing			?-	<b>.</b>	•		
chedule He	earing for Envelope #18316	57						
Select	Date	Start	End					
0	04/14/2020	8:00 AM	9:00 AM					
0	04/14/2020	9:00 AM	10:00 AM					
0	04/14/2020	10:00 AM	11:00 AM					
0	04/14/2020	11:00 AM	12:00 PM					
0	04/14/2020	12:00 PM	1:00 PM					
0	04/14/2020	1:00 PM	2:00 PM	ß				
0	04/14/2020	2:00 PM	3:00 PM					
0	04/14/2020	3:00 PM	4:00 PM					
0	04/14/2020	4:00 PM	5:00 PM					
0	04/15/2020	8:00 AM	9:00 AM					
Previous 1	2 3 4 5 Next		45 Result(s) Page 1 of 5					
DO NOT SCHEDU	ILE						SAVE	



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

DO NOT SCHEDULE

# Scheduling a Hearing Date for a New Case Filing

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

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

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

To schedule a hearing for a new case filing:

START FILING

1. From the *Dashboard* page, click

= 🐝 eFile Dashboard		<b>@</b> - ⊕- <b>Ⅲ</b> - <b>≜</b>
Start Filing	Filing History	Drafts
Click on START FILING to select your filing options. You could initiate a case or file into an existing case.	Envelope # 165149 Envelope # 165149 Submitted at 01/24/2020 9:22 AM Filings: Submitted (1)	Draft # 9063 Draft # 9063 Started at 01/22/2020 3:55 PM
	Envelope # 745447	Draft # 9062 Draft # 9062 Started at 01/22/2020 3:54 PM
	Envelope # 745447 Submitted at 12/16/2019 4:54 PM Filings: Submitted (1)	Draft # 9060 Draft # 9060 Started at 01/22/2020 1:42 PM
	Case # cc-15-1813 Envelope # 157230 Submitted at 11/05/2019 9:06 PM Filings: Accepted (1)	
START FILING	View Filing History	View My Drafts
Case Search Q	Bookmarks	Templates
	<b>CC-15-1813</b> - ******** OFS QA 2017	
	CC-19-3942 - b b v. a a OFS QA 2017 - Court at Law	
	CC-15-230 File and Serve	
Search Cases	View My Bookmarks	View My Templates

Figure 8.49 – Dashboard Page

The Start Filing page is displayed.

= 🀝 EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	<b></b> -	±
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Lozon # Select •				
Location is Required.				
← DASHBOARD				
Ç.				
				Ø Help

Figure 8.50 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

= 🎪 FFILE QA 01 Start Filing	Q
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Locator * OFS MockCMS	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHBOARD	
6	
	р нер

Figure 8.51 – Start Filing Page with Case Panes Displayed

3. Click

The Upload Documents page is displayed.

BROWSE

6. Click

- 4. Click \_\_\_\_\_\_ to look for the documents that you want to upload.
- 5. Select each document to be uploaded.

CASE INFORMATION ->

to continue with your filing.

The Case Information page is displayed.

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

≡ 🐝 Case Information - Draft # 11518 🚯 -	€· ⊕· Ⅲ- ≛
Documents Case Parties Filings Service Fees Summary Hearing	
Location *	Case Category *
OFS MockCMS +	Select +
	Case Category is Required.
Case Type 🗚	
Select +	
Case Type is Required.	
	6
← UPLOAD DOCUMENTS SAVE AND EXIT	v5 PARTIES.➔

Figure 8.52 – Case Information Page

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

The *Parties* page is displayed.

≡ 🐝 Parties - Draft # 1	11518 🚺 -					<b>?</b> - ()	- 🔳-	
Documents Case	Parties Filings	Service Fees Summa	ry Hearing					
Party Type	Required Party	Party Name		Lead Attorney				Actions
No Party Type Selected								🔺 🗹 🗊
Personal 🛕	Address Additional Ident	ifiers						Hide Details
Party Type *								
Select Party Type is Required.	\$				6			
rany type is nequired.								
Personal Information	n							
Person O Entity								
First Name \star		Middle Name		Last Name 🗚		Suffix		\$
First Name is Required.				Last Name is Required.				
Party CMS ID		Interpreter						
		Select	÷					
Attorney Information	ı							
ADD/EDIT ATTORNEYS	21							GO TO ADDRESS
								+ ADD PARTY
← CASE INFORMATION	SAVE AND EXIT							FiLINGS →

Figure 8.53 – Parties Page

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



The Filings page is displayed.

cuments Case P	Parties Filings Service Fe	es Summary	Hearing			
ng Code	Client Ref #	Filir	g Description			Actions
						🔺 🗾 🚺
Details 🛕 Optiona	al Services Communication					Hide Det
Filing Type \star			Filing Code 🗱			
eFile Only		¢	Select			\$
			Filing Code is Required.			
Filing Description				Client Reference Number		
Comments to Court 🚯						
						GO TO OPTIONAL SERVICES
Filing on behalf of 🚯						
ASSOCIATED PARTIES						
Upload Docume	onto*					
Select a filing code before uploadi	ing accuments.					

Figure 8.54 – Filings Page

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



The Service page is displayed.

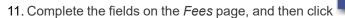
≡ 🐝 Service - Dr	aft # 11518 🕕 🗧			<b>0</b> - ⊕- Ⅲ- [	
Documents Cas	e Parties Filings Service	Fees Summary Hearing			6
d Service Contacts:					
FROM MY FIRM	2+ FROM PUBLIC LIST	CONTACT			
Parties		Service Contacts			Show Al
Type: Petitioner	Name: Harry Jones	Name	Email/Mail		Count: 0
		No service contacts			
Type: Respondent	Name: Eleanor Smith	Name	Email/Mail		Count: 0
		No service contacts			
← FILINGS SAVE A	AND EXIT				FEES ->





10. Select the service contacts, and then click

The *Fees* page is displayed.



### The Summary page is displayed.

Return Date					
at Of State Service					
] Iver Euler				Return Date	
		C VERFY		Agreements	
etum date must be verified.				Case	
ubmission Agreements				Parties Filings	
ase				Senice Fees	
naisen	Calegory		lype	SUMT	
PS MockCMS	DVI		Malpractice		
Parties				Calculating Fees	
ilings				/	
ning hype eF3e Chly	Pileg Cole Ackrowiedgerwet	Chart Ind #	Maglacerpice		
Component	Doorsee Neeve	Construction	limitly		
Lead Document	reductifia.pdf	Acknowledgement	linerly		
Deschad Veron Original					Le <sup>a</sup>
ervice				,	
set vice				,	
one					
ees				1	
yeeret Alland. biyeet	Film, Actorny Petri Masjon	Party Transmittle for Fase Desnror Smith MD	Film Type Default		
ave	Pery Mason	Dearly Smith MD	Leibh		
				Waiver Selected	
♦ FREE SAVE AND RET				3.8MT	

Figure 8.56 – Summary Page

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



### The Schedule Hearing page is displayed.

Se eFile	<ul> <li>Schedule Hearing</li> </ul>				<b>?</b> ~	<b>.</b>	•	
chedule H	earing for Envelope #	\$183167						
Select	Date	Start	End					
0	04/14/2020	8:00 AM	9:00 AM					
0	04/14/2020	9:00 AM	10:00 AM					
0	04/14/2020	10:00 AM	11:00 AM					
0	04/14/2020	11:00 AM	12:00 PM					
0	04/14/2020	12:00 PM	1:00 PM					
0	04/14/2020	1:00 PM	2:00 PM		ß			
0	04/14/2020	2:00 PM	3:00 PM					
0	04/14/2020	3:00 PM	4:00 PM					
0	04/14/2020	4:00 PM	5:00 PM					
0	04/15/2020	8:00 AM	9:00 AM					
Previous 1	2 3 4 5 Next		45 Result(s	Page 1 of 5				
_								
DO NOT SCHED	ULE							SAV



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

## SAVE

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

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

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

DO NOT SCHEDULE

# Scheduling a Hearing for an Existing Case Filing

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

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

To schedule a hearing for an existing case filing:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.

≡ stille Filing History					<b>0</b> - ⊕-	<b></b> -	• moserre.com.com.
Filing History Filter	FILING HISTORY FILIN	G DRAFTS					2 Result(s) Page 1 of 1
Status	Envelope # 7	165244 01/28/2020 3:53 PM by Pro Se					
All Statuses     Accepted	Filing Status	01/28/2020 3:53 PM by Pro Se	Filing Type	Filing Description	Clien	Ref #	
Cancelled     Receipted     Served	Submitted	Acquittal	eFile Only				
Returned     Submitted     Submitting	Envelope # 165149 Submitted	01/24/2020 9:22 AM by Pro Se					
Location	Filing Status Reviewed	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description	Clien	Ref #	
Any Location   Case Number / Envelope Number	Previous 1 Next						2.Result(s) Page 1 of 1
Case Number Envelope Number							
Date Range							C <sub>2</sub>
Anytime Last Worth Last Work Last Week Last Week Last Two Days From Date To Date REST FITE							

Figure 8.58 – Filing History Page

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

The envelope details are displayed.

Details - Envelope # 183169				PRINT SCHEDULE HEARING CLOSE
Case				
OFS MockCMS	Category Family		Type Division Of Property	
Parties Count: 2				Show All
Filings				ß
Filing Type eFile Only	Filing Code Acknowledgement	Client Ref #	Filing Description	
Submitted Date 04/14/2020 5:18 PM	Status Submitted	Review Date		
Component Lead Document Deventual Version Original	Occurrent Name redactthis.pdf	Description	Security	
Service <sup>toure 0</sup> None				
Fees				
Payment Account Waiver Order ID	Filing Automey Peter John Parker Transaction Response	Party Responsible for Fees George Jones Transaction Amount \$0.00	Filer Type <b>Default</b> Transaction ID	
				Total \$0.0 Waiver Selecte
				SCHEDULE HEARING CLOSE



SCHEDULE HEARING

4. Click

The Schedule Hearing page is displayed.

y erite	Schedule Hearing			3	• .	•	
hedule He	earing for Envelope #18	33167					
Select	Date	Start	End				
0	04/14/2020	8:00 AM	9:00 AM				
0	04/14/2020	9:00 AM	10:00 AM				
0	04/14/2020	10:00 AM	11:00 AM				
0	04/14/2020	11:00 AM	12:00 PM				
0	04/14/2020	12:00 PM	1:00 PM				
0	04/14/2020	1:00 PM	2:00 PM	C	3		
0	04/14/2020	2:00 PM	3:00 PM				
0	04/14/2020	3:00 PM	4:00 PM				
0	04/14/2020	4:00 PM	5:00 PM				
0	04/15/2020	8:00 AM	9:00 AM				
Previous 1	2 3 4 5 Next		45 Result(s) Page 1 of	5			
DO NOT SCHEDU	JLE						SAV



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

## SAVE

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

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

## Entering a Filing with an Ad Damnum Amount

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

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

#### To enter filing details:

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

E 🤸 Filings-Draft # 9112 🕕				@* <b>#</b> * I	A      A  A     A
Cocuments Case Parties Film	gs Service Fees Summary				
ling Code	Client Ref #	Filing Description			Actions
greement (w/ Ad Damnum)					/ 1
Details Optional Services Com	munication				Hide Detail
Fing Type +		Pling Cole + Agreement (eil Ad Damnum)			٠
Tring Description			Client Reference Number		
Comments to Court 🚯					
		Ι			
					GO TO OPTIONAL SERVICES
Frequested of Associated PARTIES					
Component	Name	Actions	Description	Security	
Lead Document	Academic, Calendar, Spring, 2019. pdf	AUTO REDACT	sourpen <b>O</b> Academic_Calender_Spring_2019.pdf	Select.	
Attachments		ADD DOCUMENTS			
					CADO FILINO
← PARTIES SAVE AND EXIT					SKIP TO FEES → → SERVICE →

Figure 8.61 – Filings Page

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

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

- 3. Type a description of the filing in the Filing Description field.
- 4. Type a client reference number in the **Client Reference Number** field.
- 5. Type any relevant comments in the Comments to Court field.

GO TO OPTIONAL SERVICES

6. if you need to apply any optional services for the filing, click

The **Optional Services** tab is displayed.

ot Selected		Selected
ro Fee Service	\$1	→
lit Fee Service	\$10	→
rtified Copies	?? × \$5	→
r Page Fee Service	₩ x	→
ice Per Party	\$10	→
iority Processing	22 × \$4	→
aceholder Service 1		→
aceholder Service 2 with a long description to trigg rizontal scrolling	er	→
ceholder Service 3		· · · · · · · · · · · · · · · · · · ·
aceholder Service 4		→
IGA Decline Error	\$280	→
oken Fee	\$10	→
r Page Fee No Multiplier		→

Figure 8.62 – Sample Optional Services Tab

7. To select the applicable optional services, click

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

⇒

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

GO TO COMMUNICATION

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

9. Click

to associate parties with the filing.

Associate Parties to	this Filing				
First Name	Last Name	Entity	Party Type Select	<b>♦</b> FILTER RES	ET
Select	Party Name			Party Type	
	Phil Defendant			Defendant	
	Susan Plaintiff			Plaintiff	
Previous 1 Next					2 Result(s) Page 1 of 1
					CANCEL SAVE

The Associate Parties to this Filing window is displayed.

### Figure 8.63 – Associate Parties to this Filing Window

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

- 11. Select the relationship of the party from the **Party Type** drop-down list.
- 12. Select the check box for the party to which the associated party should be connected.



14. In the Upload Documents pane, click

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

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

Upload Docume	nts*			
Component	Name	Actions	Description	Security
Lead Document		ADD DOCUMENTS	This document is required.	
Attachments		ADD DOCUMENTS		

Figure 8.64 – Upload Documents Pane

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ ■			
	Drag files here or	BROWSE		
Maximum Filesize: 50.00 MB				
Supported File Types: TIFF Files (*	TIFF TIF) WordPerfect File (WPD ent (XML) Windows Media File (	) Word 2007 File (DO	CX) Word 97/XP File (D	OC) Portable

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

Figure 8.65 – Select document(s) for Lead Document Window

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

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

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

16. After you have added all of your lead documents, click
17. If you have attachments to add to the filing, click in the <b>Attachments</b> section.
18. If you want to add security to any of the documents, select an option from the <b>Security</b> drop-down list.
19. If you want to add another filing, click NEXT FILING . Then, repeat the same steps for the next filing.
20. After you have added all of the filings, click .
The <i>Service</i> page is displayed.
21. Select the service contacts, and then click
The <i>Fees</i> page is displayed.

≡ 🀝 Fees-Draft#9112 0.		Q.	<b>0</b> ∙ ⊕.	<b>0</b> - ⊕- <b>Ⅲ</b> -
Documents Case Parties Filings Service Fees Su	ummary	ummary	ummary	ummary
Ad Damrum 🕷				
Ad Damnum is Required.				
Payment Account *				
\$				
Payment Account is Required.				
4 active Payment Method(s) are not listed due to being expired.				
Filing Attorney 🛈 🕷				
\$				
Filing Attorney is Required.				
Party Responsible for Fees *				
Select				
Party Responsible for Fees is Required.				
Filer Type				
Select ¢				
CALCULATE FEES				
← SERVICE CONTACTS SAVE AND EXIT				



- 22. On the Fees page, type the amount of damages for the case in the Ad Damnum field.
- 23. Select the payment account from the Payment Account drop-down list.
- 24. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

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

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

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

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

27. Click

### The fees for the filing are displayed.

≣ 🐝 Fees-Draft # 9112 🕕		<b>⊙</b> ∙ ⊕∗ <b>Ⅲ</b> ∗ ≜
Documents Case Parties Filings Service Fees	Summary	
40 Damnum * 5000	1 Damages	^
Payment Account *	Case Initiation Fee	\$10.50
Test Account +		Sub Total \$10.50
active Payment Method(s) are not listed due to being expired.		
ling Attorney 🚺 \star	🖹 Agreement (w/ Ad Damnum)	^
Tim Cook ¢		
sty Responsible for Fees 🗶	Filing Fee	\$40.00 Sub Total \$40.00
Doreen Plaintiff		<b>Sub loca</b> 340.00
er Type	Service Fees	^
Default ¢		
	Total Service Fees	\$1.00
	Convenience Fee Total Court Service Fees	\$1.31 \$1.00
		Sub Total \$3.31
		Grand Total \$53
- SERVICE CONTACTS SAVE AND EXIT		SUMMARY

Figure 8.67 – Sample Ad Damnum Fees on the Fees Page

SUMMARY 28. 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: This feature is configured by Tyler and may not be available on your system.

≡ 🐝 Filings - Draft # 67	D3 <b>1</b> -		<b>0</b> - ⊕- <b>Ⅲ- ≜</b>
Documents Case	Parties Filings Service Fees Summary		
Filing Code	Client Ref #	Filing Description	Actions
			🛆 🗹 🖬
Details 🛕 Option	al Services Communication		Hog Details
Filing Type *		Filing Dode *	•
er ne Only		Select Filing Code is Required.	•
Filing Description		Clart Informace No.	nber
Comments to Court			
			GO TO OPTIONAL SERVICES
Filing on behalf of  ASSOCIATED PARTIES			
Upload Docum	ents*		
Select a filing code before up	loading documents.		ß
← PARTIES SAVE AND E	TIX		SKIP TO FEES → SERVICE →

Figure 8.68 – Filings Page

To enter a filing with a Motion Type code:

- 1. On the *Filings* page, select the filing type from the **Filing Type** drop-down list.
- 2. Select a Motion filing code from the Filing Code drop-down list.

The Motion Type drop-down list is displayed with a list of applicable Motion Types.

Motion Type 🕕	
Select	\$
Select	43
Motion Type - Structured Settlement	
Motion Type - Uncontested Prove Up	
Motion Type - Default Prove Up	
Motion Type - Motion	

### Figure 8.69 – Sample Motion Type Drop-Down List

- 3. Select the appropriate Motion Type from the drop-down list.
- 4. Type a description of the filing in the **Filing Description** field.
- 5. Type a client reference number in the **Client Reference Number** field.
- 6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
- 7. if you need to apply any optional services for the filing, click

GO TO OPTIONAL SERVICES

#### The **Optional Services** tab is displayed.

ot Selected		Selected
ro Fee Service	\$1	→
lit Fee Service	\$10	→
ertified Copies	?? x \$5	$\rightarrow$
r Page Fee Service	27 x	$\rightarrow$
nce Per Party	\$18	→
iority Processing	?? × \$4	→
aceholder Service 1		→
aceholder Service 2 with a long description to rizontal scrolling	o trigger	*
aceholder Service 3		→
aceholder Service 4		→
IGA Decline Error	\$280	→
oken Fee	\$10	$\rightarrow$
r Page Fee No Multiplier		→

Figure 8.70 – Sample Optional Services Tab

8. To select the applicable optional services, click

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

⇒

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

GO TO COMMUNICATION

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

10. Click

ASSOCIATED PARTIES

to associate parties with the filing.

Associate Part	ties to this Filing				
First Name	Last Name	Entity	Party Type Select	÷ FILTER RI	SET
Select	Party Name			Party Type	
	Phil Defendant			Defendant	
	Susan Plaintiff			Plaintiff	
Previous 1 Nex	xt				2 Result(s) Page 1 of 1
					CANCEL SAVE

The Associate Parties to this Filing window is displayed.



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

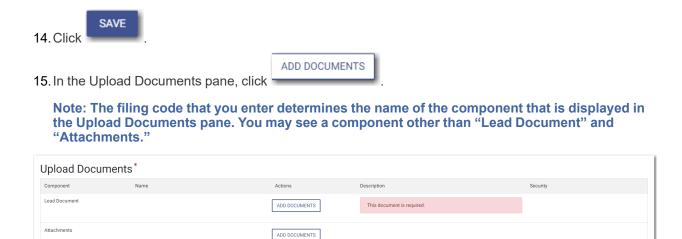


Figure 8.72 – Upload Documents Pane

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

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ 🗊			
	Drag files here or	BROWSE		
Maximum Filesize: 50.00 MB				
Supported File Types: TIFF Files (T	IFF TIF) WordPerfect File (WPI	D) Word 2007 File (DO	CX) Word 97/XP File (DOC) P	ortable
Oocument File (PDF) XML Docume	ent (XML) Windows Media File	(WMV) MPEG (MPEG)	).	

Figure 8.73 – Select document(s) for Lead Document Window

Note: If you have already uploaded a lead document, the document is listed in the window.
16. Click to select the lead document if a document has already been uploaded. Click to look for a document to upload or to locate additional lead documents.
Note: If you want to delete a document that you previously uploaded, click
17. After you have added all of your lead documents, click
18. If you have attachments to add to the filing, click       ADD DOCUMENTS         19. If you want to add security to any of the documents, select an option from the Security drop-down list.

20. If you want	to add another filing	g, click	. Then, repea	t the same steps f	or the next filing.
21. After you h	ave added all of the		ERVICE →	SKIP TO FEES	
Documents Case Parties	Filings Service Fees Summary				
Filing Code	Client Ref #	Filing Description			Actions
Motions					🔺 🗹 🧰
Details Optional Services	Communication				Hide Details
Filing Type *		Filing Code * Motions - \$1234.00			•

Select		\$			
Filing Description			Client Reference Number		
Comments to Court					
					le le
					GO TO OPTIONAL SERVICES
Filing on behalf of  ASSOCIATED PARTIES					
Upload Documents	*				
Component	Name	Actions	Description	Security	
Lead Document		ADD DOCUMENTS	This document is required.		

Figure 8.74 – Example of a Filings Page with a Motion Filing Code Selected

# Entering a Filing with a Claim Amount

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

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

### To enter filing details:

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

🗏 🤸 Filings-Draft # 9107 🔹				<b>⊙</b> · ⊕- ⊞·	L
Documents Case Parties Filings	Service Fees Summary				
Filing Code	Client Ref #	Filing Description			Actions
Waiver w/ special behavior					/ 1
Details Optional Services Communicati	lon				HOLOCAR
Filing Type *		Filing Code *			
eFile Only	<u></u> }	Waiver wi special behavior	Client Reference Number		•
Filing Description			Chair Handhoo Humoar		
Comments to Court					
					GO TO OPTIONAL SERVICES
Pterg on bahaf of <b>O</b> ASSOCIATED PARTIES					
Upload Documents*					
Component	Name	Actions	Description	Security	
Lead Document	teat patf	AUTO REDACT	Executions ©	Select.	٥
Attachments		ADD DOCUMENTS			
← PAUTTES SAVE AND EXIT				309	

Figure 8.75 – Example of a Filings Page

- 2. Select the appropriate filing code from the Filing Code drop-down list.
- 3. Type a description of the filing in the **Filing Description** field.
- 4. Type a client reference number in the Client Reference Number field.
- 5. Type any relevant comments in the **Comments to Court** field.

GO TO OPTIONAL SERVICES

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

### The **Optional Services** tab is displayed.

Not Selected		Selected	
Zero Fee Service	\$1	→	
Split Fee Service	\$10	→	
Certified Copies	77 × \$5	→	
Per Page Fee Service	n x	→	
Ince Per Party	\$10	→	
riority Processing	?? × \$4	→	
Placeholder Service 1		→	
Placeholder Service 2 with a long description orizontal scrolling	n to trigger	→	
laceholder Service 3		→	
Placeholder Service 4		→	
OGA Decline Error	\$280	→	
Iroken Fee	\$10	→	
Per Page Fee No Multiplier		→	



7. To select the applicable optional services, click

⇒

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

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

GO TO COMMUNICATION

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

ASSOCIATED PARTIES

9. Click \_\_\_\_\_ to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

Associate Parties to th	nis Filing						
First Name	Last Name	Entity	Party Type Select	\$	FILTER	RESET	
Select	Party Name			Party Type			
	Phil Defendant			Defendant			
	Susan Plaintiff			Plaintiff			
Previous 1 Next							2 Result(s) Page 1 of
							CANCEL SAVE

Figure 8.77 – Associate Parties to this Filing Window

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



ADD DOCUMENTS

14. In the Upload Documents pane, click

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

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

Upload Documents <sup>*</sup>				
Component Name	Actions	Description	Security	
Lead Document	ADD DOCUMENTS	This document is required.		
Attachments	ADD DOCUMENTS			

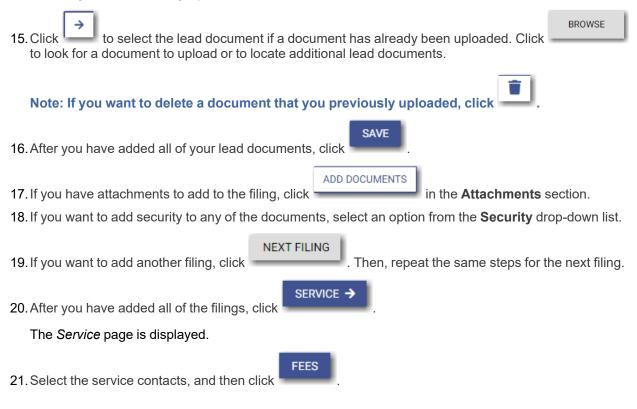
Figure 8.78 – Upload Documents Pane

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

Not Selected		Selected	
test.pdf	→		
Academic_Calendar	→		
	Drag files here o	BROWSE	
Maximum Filesize: 50.00 MB			
Supported File Types: TIFF Files (T	IFF TIF) WordPerfect File (WP	PD) Word 2007 File (DOCX) Word 97/XP File (DOC) Portable	•
Document File (PDF) XML Docume	nt (XML) Windows Media File	e (WMV) MPEG (MPEG)	

Figure 8.79 – Select document(s) for Lead Document Window

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



#### The Fees page is displayed.

≡ 🐝 Fees-Draft # 9107 🕕		
Documents Case Parties Filings Se	rvice Fees	Su
Claim Amount *		
Claim Amount is Required.		
Payment Account * Select		٥
Payment Account is Required.		
4 active Payment Method(s) are not listed due to being expired.		
Filing Attorney 🚯 *		
Select		٥
Filing Attorney is Required.		
Party Responsible for Fees. *		
Select	\$ SEARCH	
Party Responsible for Fees is Required.		
Filer Type		
Select		٠
	CALCULATE F	
	CALCODATE P	
SAVE AND EXIT		

Figure 8.80 – Fees Page

- 22. On the Fees page, type the Claim Amount in the Claim Amount field.
- 23. Select the payment account from the Payment Account drop-down list.
- 24. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

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

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

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

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

CALCULATE FEES

The fees for the filing are displayed.

27. Click

≡ 🐝 Fees - Draft # 9107 ा -		<b>?</b> -	<b>.</b>	<b></b> -	·
Documents Case Parties Filings Service Fees	Summary				
Claim Amount * 10000	Waiver w/ special behavior				^
Payment Account * New Account	Filing Fee				\$10.00 Sub Total \$10.00
Filing Attorney <b>® ★</b> Jack N Stone ◆	Service Fees				^
Party Responsible for Frees <b>*</b> Georgia Defendant <b>¢</b>	Total Service Fees Convenience Fee Total Court Service Fees				\$1.00 \$1.00 \$1.00 <b>Sub Total</b> \$3.00
Filer Type Default •					Grand Total \$13.00
← SERVICE CONTACTS SAVE AND EXIT					SUMMARY →

Figure 8.81 – Sample Claim Amount Fees on the Fees Page

28. Click to review and complete your filing.

## Entering a Filing with an Estate Value

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

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

To enter filing details:

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

= 🤸 Filings-Draft # 9103 🕕				0· ÷·	■• ▲ ■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■
Documents Case Parties Filings	Service Fees Summary				
Filing Code	Client Ref #	Filing Description			Actions
Statement w/ special behavior					/ 1
Details Optional Services Commun	vication				Hos Details
FilingType #		Filing Code      Statement wi special behavi	ar - \$10.50		•
Filing Description			Client Reference Number		
Comments to Court					
					//
					GO TO OPTIONAL SERVICES
Pting on bahalf of 0 ASSOCIATED PARTIES					
Upload Documents*					
Component	Name	Actions	Description	Security	
Lead Document	test (1).pdf	×	Gescription () test (1).pdf	Select	•
		AUTO-REDACT		le la	
Attachments		ADD DOCUMENTS			
					CO FILING
← PARTIES SAVE AND EXIT					SKIP TO FEES → → SERMCE →

Figure 8.82 – Example of a Filings Page

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

- 3. Type a description of the filing in the Filing Description field.
- 4. Type a client reference number in the **Client Reference Number** field.
- 5. Type any relevant comments in the **Comments to Court** field.
- 6. if you need to apply any optional services for the filing, click

GO TO OPTIONAL SERVICES

The **Optional Services** tab is displayed.

Not Selected		Selected	
Zero Fee Service	\$1	<b>*</b>	
plit Fee Service	\$10	<b>*</b>	
ertified Copies	77 × \$5	→	
er Page Fee Service	77 x	→	
nce Per Party	\$10	→	
riority Processing	?? x \$4	→	
laceholder Service 1		→	
laceholder Service 2 with a long description t orizontal scrolling	o trigger	<b>*</b>	
laceholder Service 3		→	
laceholder Service 4		→	
OGA Decline Error	\$280	→	
roken Fee	\$10	→	
er Page Fee No Multiplier		→	

Figure 8.83 – Sample Optional Services Tab

7. To select the applicable optional services, click

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

⇒

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

#### GO TO COMMUNICATION

÷

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

ASSOCIATED PARTIES

9. Click \_\_\_\_\_ to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

Associate Parties to this Filing							
First Name	Last Name	Entity	Party Type Select	<b>FILTER</b> RESET			
Select	Party Name			Party Type			
	Phil Defendant			Defendant			
	Susan Plaintiff			Plaintiff			
Previous 1 Next					2 Result(s) Page 1 of 1		
					CANCEL SAVE		



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

	SAVE	
13. Click	_	١.

ADD DOCUMENTS

14. In the Upload Documents pane, click

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

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

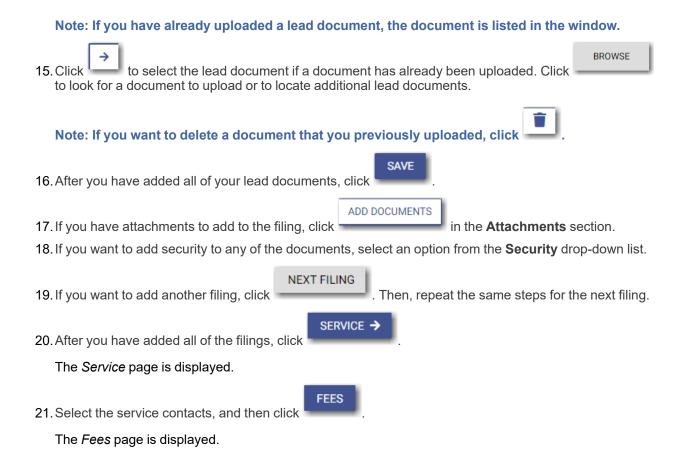
Upload Documents*						
Component	Name	Actions	Description		Security	
Lead Document		ADD DOCUME	ENTS This document is required.			
Attachments		ADD DOCUME	ENTS			

#### Figure 8.85 – Upload Documents Pane

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

Not Selected		Selected	
test.pdf	→		
Academic_Calendar	→ 🗊		
	Drag files here or	BROWSE	
Maximum Filesize: 50.00 MB			
Supported File Types: TIFF Files (	ent (XML) Windows Media File (		lie (DUC) Portable

Figure 8.86 – Select document(s) for Lead Document Window



≡ 🤹 Fees - Draft # 9103 🚯 •		
Documents Case Parties Filings S	ervice Fees	Sum
Estate Value *		
Estate Value is Required.		
Payment Account * Select		
		÷
Payment Account is Required.		
4 active Payment Method(s) are not listed due to being expired.		
Filing Attorney 10 *		¢
Filing Attorney is Required.		
Thing Atomoy is required.		
Party Responsible for Fees * Select	SEARCH	
	€ SEARCH	
Party Responsible for Fees is Required.		
Filer Type		
Select		٥
		E FEES
SAVE AND EXIT		

Figure 8.87 – Fees Page

- 22. On the Fees page, type the Estate Value in the Estate Value field.
- 23. Select the payment account from the Payment Account drop-down list.
- 24. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

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

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

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

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



The fees for the filing are displayed.

≡ 🐝 Fees - Draft # 9103 🚯 -	Ø- <del>-</del>	
Documents Case Parties Filings Service Fees	Summary	
Entane Value * 200000	Statement w/ special behavior	^
Payment Account * Payment Account *  4 active Payment Method(s) are not listed due to being expired.	Filing Fee	\$10.00 Sub Total \$10.00
Fileg Atomey ① * Perry Mason	Service Fees	^
Party Responsible for Fees * Jerry Defendant	Total Service Fees Convenience Fee Total Court Service Fees	\$1.00 \$1.00 \$1.00
Filer Type Default		Sub Total \$3.00
		Grand Total \$13.00
← SERVICE CONTACTS SAVE AND EXIT		

Figure 8.88 – Sample Estate Value Fees on the Fees Page

28. Click summary to review and complete your filing.

## **Entering Payment Information**

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

Note: Your firm must have a payment account created before you can complete your filing.

≡ 🐝 Fees-Draft # 6704 0-	<b>?</b> -	<b>.</b> -	•	······································
Documents Case Parties Filings Service Fees Summary				
Payment Account *				
Select •				
Payment Account is Required.				
Filing Attorney 🚺				
Select •				
Party Responsible for Fees # SElect Party Responsible for Fees is Required. Fier Type Select e				
← SERVICE CONTACTS SAVE AND EXIT				

Figure 8.89 – Fees Page

To enter the payment information for your filing:

- 1. Select the payment account from the Payment Account drop-down list.
- 2. Select the filing attorney from the Filing Attorney drop-down list.
- 3. Select the party responsible for fees from the Party Responsible for Fees drop-down list. Click

SEARCH

if you want to search for a party.

Select Party Re	esponsible For Fees	3			
First Name	Last Name	Entity	Party Type Select	➡ FILTER RESE	т
Select	Party Name			Party Type	
0	Mary Jones			Plaintiff	
•	John Smith			Defendant	
Previous 1 Nex	t				2 Result(s) Page 1 of 1
					CANCEL SAVE

Figure 8.90 – Select Party Responsible For Fees Window

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

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

#### CALCULATE FEES

5. Click

The fees for the filing are displayed.

≡ 🤹 Fees - Draft # 9272 🚯 -			<b>?</b> -	<b>.</b>	•	International Contract Cont
Documents Case Parties Filings Ser	vice Fees	Summary				
Payment Account *						
test config acc 3	\$	Breach Of Contract				^
active Payment Method(s) are not listed due to being expired.		Case Initiation Fee				\$4.00
iling Attorney 🕕 \star						Sub Total \$4.00
Perry Mason	\$					Sub lotal \$4.00
Party Responsible for Fees *						
Peter Defendant ÷	SEARCH	Service Fees				^
iler Type		Total Service Fees				\$1.00
Default	÷	Convenience Fee				\$1.00
		Total Court Service Fees				\$1.00
						Sub Total \$3.00
	CALCULATE FEES					
						Grand Total \$7.0
SERVICE CONTACTS SAVE AND EXIT						SUMMARY -
← SERVICE CONTACTS SAVE AND EXIT						SUMMARY -

Figure 8.91 – 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.

	<b>∂</b> - ⊕- <b>Ⅲ</b> - <b>≜</b>
Summary	
Reach Of Contract	
Case Initiation Fee	\$5.00
Suber million ee	Subtotal \$5.00
Abstract Of Judgment	^
Filing Fee	\$5.00
	Subtotal \$5.00
Mail Service Fees	^
Total Mail Service Fees	\$6.00
	Subtotal \$6.00
<ul> <li>Service Fees</li> </ul>	^
Total Service Fees	\$1.00
	\$1.00 \$1.00
	Subtotal \$3.00
	Grand Total \$19.
	SUMMARY
	<ul> <li> <b>m</b> Breach Of Contract      </li> <li>             Case Initiation Fee         </li> <li>             Abstract Of Judgment         </li> <li>             Filing Fee         </li> <li>             Mail Service Fees         </li> <li>             Total Mail Service Fees         </li> <li>             Service Fees         </li> </ul>

Figure 8.92 – Example of a Fees Page with the Mail Service Fees Displayed

SUMMARY 🗲

6. Review the filing fees, and then click

# Entering Payment Information for Per-Page Optional Service Fee

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

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

#### Note: Your firm must have a payment account created before you can complete your filing.

To enter the payment information for your filing:

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

GO TO OPTIONAL SERVICES

c. Click

The **Optional Services** tab is displayed.

102

Details Optional Services Co	mmunication					Hide Details
Not Selected			Selected			
Zero Fee Service	\$1	<b>→</b>	÷	Per Page Fee Service	0 ×	
Split Fee Service	\$10	<b>→</b>	Multiplier \star			
Certified Copies	?? x \$5	<b>&gt;</b>	0			
Once Per Party	\$10	<b>→</b>				
Priority Processing	?? x \$5	<b>→</b>				
Placeholder Service 1		<b>→</b>				
Placeholder Service 2 with a long description to trigger horizontal scrolling		÷				
Placeholder Service 3		<b>→</b>				
Placeholder Service 4		<b>→</b>				
TOGA Decline Error	\$280	<b>→</b>				
Broken Fee	\$10	<b>&gt;</b>				
Per Page Fee No Multiplier		÷				
						GO TO COMMUNICATION

Figure 8.93 – Sample Optional Services Tab

d. To select the applicable optional services, click

Some optional services require that you type the number of services that you need. The per-page optional service is one of those services. After you type the number of services, the Multiplier will calculate the amount.

⇒

- e. Continue entering the rest of the required information on the *Filings* page.
- 5. On the Service page, add the appropriate service contacts.
- 6. On the Fees page, select the payment account from the Payment Account drop-down list.
- 7. Select the party responsible for fees from the Party Responsible for Fees drop-down list. Click

SEARCH

if you want to search for a party.

Select Party R	esponsible For Fees				
First Name	Last Name	Entity	Party Type Select	\$ FILTER	RESET
Select	Party Name			Party Type	
0	Mary Jones			Plaintiff	
•	John Smith			Defendant	
Previous 1 Ne	xt				2 Result(s) Page 1 of 1
					CANCEL SAVE



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

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

#### CALCULATE FEES

9. Click

The fees for the filing are displayed.

≡ 🐝 Fees - Draft # 7954 🕕 -		<b>?</b> -	<b>.</b>	•	Energy ************************************
Documents Case Parties Filings Service	Fees Summary				
Payment Account *					
Credit Card					
2 active Payment Method(s) are not listed due to being expired.	\$ Optional Service Fees				^
Filing Attorney 🕕	Per Page Fee Service (\$2.50 x 2)				\$5.00
Tim Cook					Sub Total \$5.00
Party Responsible for Fees * Harry Jones ¢ SEARCH	\$ Service Fees				^
Filer Type	Total Service Fees				\$1.00
Default	Convenience Fee				\$1.00
	Total Court Service Fees				\$1.00
					Sub Total \$3.00
CALCULATE FEE					Grand Total \$8.00
← SERVICE CONTACTS SAVE AND EXIT					

Figure 8.95 – Example of a Fees Page with the Filing Fees Displayed



10. Review the filing fees, and then click

## **Submission Agreements**

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

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

The Submission Agreements pane is displayed on the Summary page.

Submission Agreements
□ I agree that this filing is in compliance with the Rules for E-Filing
You must accept the Submission Agreements.

#### Figure 8.96 – Submission Agreements Pane – One Disclaimer

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

Submission Agreements

Figure 8.97 – Submission Agreements Pane with the Check Box Selected – One Disclaimer

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

Submission Agreements
This is the first disclaimer.
This is a second disclaimer.
You must accept the Submission Agreements.

#### Figure 8.98 – Submission Agreements Pane – Two Disclaimers

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

Submission Agreements
This is the first disclaimer.
This is a second disclaimer.

Figure 8.99 – Submission Agreements Pane with the Check Boxes Selected – Two Disclaimers

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

Submission Agreements

Figure 8.100 – Submission Agreements – No Disclaimers

## 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.

Immediate	ments Case Parties Filings Service	Fees Summary			
Automation       Normalization       Normalization <th>ubmission Agreements</th> <th></th> <th></th> <th></th> <th></th>	ubmission Agreements				
Set       in any intervention of the set of the	I agree that this filing is in compliance with the Rules for E-Filing				
BC       No       No <t< th=""><th>u must accept the Submission Agreements.</th><th></th><th></th><th></th><th>Arramate</th></t<>	u must accept the Submission Agreements.				Arramate
Set in 2011 2010 2010 2010 2010 2010 2010 2010					
min     min     min     min     min     min     min     min       min     min     min     min     min     min     min       min     min     min     min     min     min     min     min       min					·
and in the second se		Category		Type Necligence	
Import					
Integ       Control         ing       Intervention       I					
interest in the second					Ever Al
mgu       mgu       mgu       mgu       mgu         réader       mgu       mgu       mgu       mgu         reader       mgu       mgu       mgu       mgu       mgu         reader       mgu       mgu       mgu       mgu       mgu       mgu         reader       mgu	et 2				SUBMIT
Image: Second	lings				1
rife of cont     A konsideration       rise data     rise data	iings				
Name     Name     Name     Name       Specific     Specific     Specific			Cleant Ruf #	Filing Description	
stard Boxersh     us galt     to galt     ordentaria (to)       Springer     Line Machine Linere     Image: Springer     Image: Springer	ene and Serve	Acknowledgement			
wm     mm       ervice     mm       v     mm       Part Subh     Same Subh       pits and Rubbel Euror     mm       ervice     mm       ervice     mm       revice     mm       revice     mm       revice     mm       revice     revice				Security	
Organization     Image: Constrained of the c			test.pdf	Confidential (G)	
Be check     Image: Check       at     Image: Check       be check     Image: Check       pit an mindra res Anter Russi     Image: Check       res check     Image: Chec	Original				
And Comparison of Section 1     Market Section 2       Pass Section 2     Section 2					
Bried Control     Bried Allowed Exerve       Plans Single Agriculture Revent     Bried Maled Exerve       Bried Maled Exerve     Bried Maled Exerve       Bried Maled Exerve     Bried Maled Exerve       Bried Maled Exerve     Scied Sci					
Fails sinh     Service Method Eurore       service Method Eurore     Image: Service Method Eurore					Hor of
path can be described on the set of the set	urt 1				
Auculation for a field of the set		Service Method: Eserve			
es and the second secon					
wy wint Noire 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Analysis Participation Participation				
Note: The set of the s					
ay John's Read	ees				/
Tedad 50.00 Waiver Selected BLOC 10 ToP					
Waiver Selected	a contraction of the second				
Waint Selected					Total \$0.00
ALCR 10 TOP					
	FES SAVE AND EXIT				BACK TO TOP SUBMIT

Figure 8.101 – Sample Summary Page

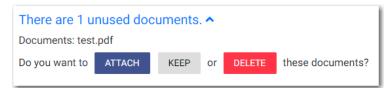
If you selected mail service for your filing, the mail service fees are displayed on the *Summary* page. Note: The Mail Service feature is configured by Tyler and may not be available on your system.

SUMMARY ->

Case	Category Civil	Type Fraud		1
Parties count: 2				Show All
Filings				j
Filing Type eFile and Serve	Filing Code Acknowledgement	Client Ref #	Filing Description	
Component Lead Document Downlad Version Original	Document Name Academic_Calendar_Spring_2019.pdf	Description Academic_Calendar_Spring_2019.pdf	Security Confidential (G)	
Service				Hide all
Lillian Henderson 1201 tenth ave Plano, TX 75024 Associated Parties: Mary Doe	Service Method: Mail			
Fees				1
Payment Account Firm's CC	Filing Attorney Perry Mason	Party Responsible for Fees Mary Doe	Filler Type Default	
1 Fraud				^
Case Initiation Fee				\$10.00 Subtotal \$10.00
Mail Service Fees				^
Total Mail Service Fees				\$6.00 Subtotal \$6.00

Figure 8.102 – Sample Summary Page with Mail Service Fees Displayed

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



#### Figure 8.103 – Unused Documents Message

- 3. Click the appropriate button regarding the unused document.
- 4. If there are submission agreements for your filing, select the appropriate check boxes for the submission agreements.
- 5. Review the summary of the case filing. After you are satisfied with the information in your filing, click SUBMIT

# 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, 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.

=- 🀝 EFILE QA 01 Summary - Draft # 621	1 😔			Ø- #-		- 11/10/10/10
Documents Case Parties Filir	ngs Service Fees Summary					
Submission Agreements	he Rules for E-Filing					
Case	Category Civil	Type Notice (	Df Removal	1	Agreements Case Parties	
cisse Adress 555 Main Street Dallas, TX 75220 US Dallas					Filings Service Fees	
Parties				Show All	SUBMIT	
Filings				1		
Filing Type eFile Only	Filing Code Acknowledgement	Client Ref #	Filing Description			
Component Lead Document Downford Version Original	Document Name Academic_Calendar_Spring_2019.pdf	Description Academic_Calendar_Spring_2019.pdf	Security Confidential (G)			\$
Service court 0 None				1		
Fees Payment Account Waiver	Filing Attorney Perry Mason	Party Responsible for Faces John Doe	Filer Type Default	1		
				Total \$0.00 Waiver Selected		
FEES SAVE AND EXIT				SUBMIT	BACK TO TOP	D Help

Figure 8.104 – 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. After you are satisfied with the information in your filing, click

SUBMIT

SUMMARY ->

# **9** Redaction Feature

#### Topics covered in this chapter

- Entering a Filing with Redacted Documents
- Deleting a Redaction
- Working with an Existing Redaction
- Redaction Editor Toolbar

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

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

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

The following data is automatically redacted:

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

## **Entering a Filing with Redacted Documents**

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

START FILING

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

To enter a filing with redacted documents:

1. On the Dashboard page, click

The *Start Filing* page is displayed.

ESO-FS-220-4496 v.11

EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	•	<b>1</b>
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Lootor * Select				
Location is Required.				
← DASHEDARD				
6				
*9				
				D Help

Figure 9.1 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

EFILE QA 01 Start Filing	<b>0</b> - ⊕- Ⅲ- <b>≜</b>
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Lector * OFS MockCMS	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHBOARD	
3	
	() Help
Eigure 0.2 Stort Filing Page with Case Pages Di	aplayed

Figure 9.2 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Upload Documents page is displayed.

≣• 🤹 EFLE QA 01 Upload Documents - Draft # 599 0 •	<b>?</b> -	<b>.</b>	<b></b> -	A
Cocuments         Case         Parties         Filings         Service         Fees         Summary				
Crag files here or BROWSE				
Maximum Filesizer 50.00 MB				
Supported File Types: TIFF Files (TIFF TIF) WordPerfect File (WPD) Word 2007 File (DOCX) Word 97/XP File (DOC) Portable Document File (PDF) XML Document (XML) Windows Media File (WMV) MPEG (MPEG).				
SAVE AND EXIT				CASE INFORMATION →

#### Figure 9.3 – Upload Documents Page—Blank

BROWSE

- 4. Click ———— to look for the documents that you want to upload.
- 5. Select each document to be uploaded.

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

😑 - 🤸 EFILE QA 01 Upload Documents - Draft # 598 🕕	<b>?</b> -	•-	<b></b> -	L
Documents         Case         Parties         Filings         Service         Fees         Summary				
redacthis.pdf KJones.pdf				AUTO-REDACT
Drag files here or BROWSE				
Maximum Filesize: 50.00 MB				
Supported File Types: TFF Files (TFF TIF) WordPerfect File (WPD) Word 2007 File (DOCX) Word 97/XP File (DOC) Portable Document File (PDF) XML Document (XML) Windows Media File (WMV) MPEG (MPEG).				
SAVE AND EXIT				CASE INFORMATION ->

#### Figure 9.4 – Upload Documents Page with an Uploaded Document



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

	Redaction is complete for
~	redactthis.pdf. Number of items
	redacted: 8

#### Figure 9.5 – Example of a Message for a Completed Redaction

CASE INFORMATION ·

to continue with your filing.

The Case Information page is displayed.

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

The Parties page is displayed.

PARTIES ->

- Complete the required fields on the *Parties* page, and then click The *Filings* page is displayed.
- 10. Complete the required fields on the *Filings* page, and then clickThe *Service* page is displayed.
- 11. Complete the required fields on the Service page, and then click

The *Fees* page is displayed.

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

The Summary page is displayed.

cuments Case Parties Filings Service	Fees Summary				
Submission Agreements					
I agree that this filing is in compliance with the Rules for E-Filing					
You must accept the Submission Agreements.					
				Agreements	
Case					
action	Category		Туро	Parties	
DFS QA 2017	Civil		Typo Negligence	Filings	
ocedures / Remodies	Damage Amount				
				Service	
Parties				Fees Fees	
Iount 2				SUBMIT	
Filings				1	
Filing Type	Filing Code	Client Ref #	Filing Description		
eFile and Serve	Acknowledgement				
Component	Document Name	Description	Security		
Lead Document	test.pdf	test.pdf	Confidential (G)		
Download Version	Actions				
Original	EDIT REDACTIONS				
	2				
Service				~ /	
ourt 1				Hide all	
Patte Smith patte.smith@gmail.com	Service Method: Eserve				
Associated Parties: Peter Plaintiff					
Fees				1	
ayment Account					
aynam Account Aary Ann's Waiver					
				Total \$0.00	
				Waiver Selected	
				waver Selected	
				BACK TO TOP	
4 FEES SAVE AND EXIT				SUBMIT	



- EDIT REDACTIONS
- 13. Review the envelope summary. If you want to edit the redacted document, click

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

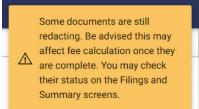
Note: If the redaction of your document is not complete, an amber message is displayed, indicating that you cannot yet complete your filing. You must wait until the redaction is complete, and then a green message is displayed, informing you of the completion.

FILINGS

SERVICE ->

FEES

SUMMARY



#### Figure 9.7 – Example of a Message with Redaction in Progress

14. Perform the necessary edits in the Redaction Editor, and then click to save your changes, or click

SUBMIT



to save your changes and close the viewer.

15. When you are done reviewing the envelope summary and have selected the check boxes for the

submission agreements (if applicable), click

## **Deleting a Redaction**

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

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

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

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

1. Right-click the specified redaction.

The Annotation Notes dialog box is displayed.



Figure 9.8 – Annotation Notes Dialog Box

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

history of the redactions that were performed in the document. Click  $\rightarrow$  to view the detailed history.

2. Click to delete the redaction.

The Delete Annotation dialog box is displayed.

Delete Annotation?	
Are you sure you wish to delete this annotation?	
	Delete Cancel

Figure 9.9 – Delete Annotation? Dialog Box

3. Click to delete the specified redaction.

## Working with an Existing Redaction

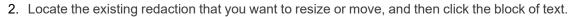
You can resize or move an existing redaction in the Redaction Editor (Tyler Content Manager window).

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

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

To work with an existing redaction:

1. Turn off the manual redaction capability by clicking



- 3. Resize the redaction, or move the redaction to another location in the document.
- 4. When you are done, click to save your changes, or click to save your changes and close the viewer.

## **Redaction Editor Toolbar**

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

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

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

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lcon	Description
=	Click this icon to begin performing a redaction.
	Click this icon to stop performing a redaction.
8	Click this icon to save the document.
	Click this icon to save and close the document.
×	Click this icon to close the <i>Tyler Content Manager</i> (TCM) viewer.
÷	Click this icon to zoom in to a particular place in the document.
0	Click this icon to zoom out.
EQ.	Click this icon to rubberband (that is, draw a border around) an area of the document in which you want to zoom.
9	Click this icon to magnify an area of the document.
<b>↓</b>	Click this icon to fit the document to the window.
1	Click this icon to fit the document to the height of the window.
•••	Click this icon to fit the document to the width of the window.
	Click this icon to view the first page of the document.
•	Click this icon to view the previous page of the document.
1 / 2	Use this window to view the current page of the document and the length of the document.
Þ	Click this icon to view the next page of the document.

Icon	Description
	Click this icon to view the last page of the document.
C	Click this icon to rotate the document to the right.
2	Click this icon to rotate the document to the left.
Ċ	Click this icon to download the document. Note: You will be prompted to save the document before you download it.
	Click this icon to display the thumbnail pane, where you can then navigate through the pages of the document. The thumbnail pane is displayed. Note: Click the icon again to close the thumbnail pane.

When the thumbnail pane is displayed, additional document options become available.



Figure 9.10 – Sample Thumbnail Pane

The following table describes the icons in the thumbnail pane.

lcon	Description
h	Click this icon in the thumbnail pane to view the pages of the document in the Redaction Editor.
<	Click this icon in the thumbnail pane to display the previous annotation page.
>	Click this icon in the thumbnail pane to display the next annotation page.
7	Click this icon in the thumbnail pane to view only the pages that have a redaction on them.

# **10** File into an Existing Case

#### Topics covered in this chapter

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

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

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

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

SEARCH

SEARCH

the search criteria for the case that you want to file into. Then, click

• On the *Dashboard* page, click Search Cases . In the *File into Existing Case* window that opens,

enter the search criteria for the case that you want to file into. Then, click

# Filing into an Existing Case from the Filing History Page

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

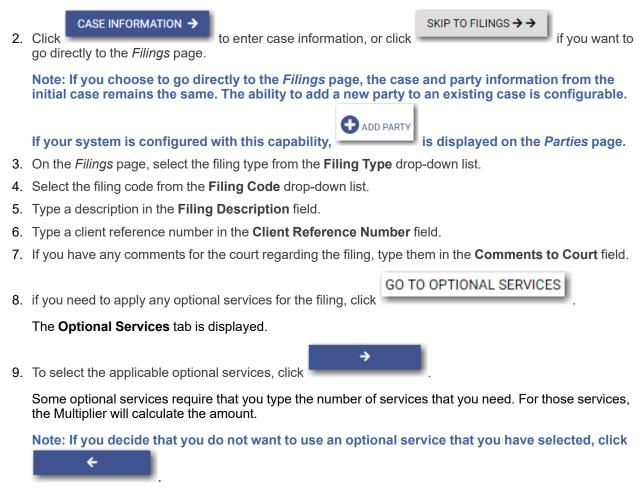
1. On the Filing History page, click



■ V •File Filing History					<b>0</b> - ⊕- <b>Ⅲ</b> -	
Filing History Filter	FILING HISTORY FILING DRAFT	тз				10 Result(s) Page 1 of 1
Created By	Envelope # 1652	241 Ly				
My Filings     My Firm	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Status	Submitted	Appointment	eFile Only			
All Statuses     Accepted     Cancelled	Envelope # 16528 Submitted 01/28/20	228 020 10:39 AM on behalf of Sam Smith by Firm Admin				
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8
O Submitting	Case # 1234					🖻 💷 🗄
Location	Envelope # 165224 Submitted 01/28/20	020 8:47 AM on behalf of Sam Smith by Firm Admin				
Any Location +	Filing Status Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #	
Case Number / Envelope Number	Envelope # 165					
Case Number		020 8:29 AM on behalf of Sam Smith by Firm Admin				
Envelope Number					Client Ref #	
Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #	
Anytime     Last Month     Last Week	Case # CC-19-34 Envelope # 165222 Submitted 01/28/20	477 020 8:23 AM on behalf of Sam Smith by Firm Admin				
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8
From Date	Envelope # 165	221				
To Date	Envelope # 165221 Submitted 01/28/20	020 8:17 AM on behalf of Sam Smith by Firm Admin				
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #	

Figure 10.1 – Filing History Page

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





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

ASSOCIATED PARTIES

11. Click

to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

Associate Parties to th	nis Filing						
First Name	Last Name	Entity	Party Type Select	\$	FILTER	RESET	
Select	Party Name			Party Type			
	Phil Defendant			Defendant			
	Susan Plaintiff			Plaintiff			
Previous 1 Next							2 Result(s) Page 1 of
							CANCEL SAVE

Figure 10.2 – Associate Parties to this Filing Window

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

- 13. Select the relationship of the party from the Party Type drop-down list.
- 14. Select the check box for the party to which the associated party should be connected.

15. Click						
16. In the Upload Documents pane, click						
Upload Documents	s*					
Component	Name	Actions	Description	Security		
Lead Document		ADD DOCUMENTS	This document is required.			
Attachments		ADD DOCUMENTS				

#### Figure 10.3 – Upload Documents Pane

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

Select document(s) for Lead Document ×
Not Selected     Selected       test.pdf     Image: Calendar       Academic_Calendar     Image: Calendar
Drag files here or     BROWSE
Maximum Filesize: 50.00 MB Supported File Types: TIFF Files (TIFF TIF) WordPerfect File (WPD) Word 2007 File (DOCX) Word 97/XP File (DOC) Portable Document File (PDF) XML Document (XML) Windows Media File (WMV) MPEG (MPEG) .
CANCEL SAVE
Figure 10.4 – Select document(s) for Lead Document Window
17. Click to look for a document to upload. Then, click to select the lead document.
Note: If you want to delete a document that you have uploaded, click
18. After you have added all of your lead documents, click
19. If you have attachments to add to the filing, click       ADD DOCUMENTS         20. If you want to add security to any of the documents, select an option from the Security drop-down list.
21. If you want to add another filing, click . Then, repeat the same steps for the next filing.
22. After you have added all of the filings, click either or SKIP TO FEES .
23. On the <i>Service</i> page, add service contacts if applicable. Then, click
24. On the Fees page, select the payment account from the Payment Account drop-down list.
25. Select the filing attorney from the Filing Attorney drop-down list.
26. Select the party responsible for fees from the Party Responsible for Fees drop-down list.
Note: If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.
27. Select the filer type from the Filer Type drop-down list.
28. Click 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.

SUBMIT

31. When you are satisfied with your filing, click

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

To file into an existing case from the *Case Search* page:

1. On the Dashboard menu, click Case Search.

The File into Existing Case window is displayed.

File into Existing Case	×
Location * Select  Location is Required.	
Search for a Case by Case Number O Party Name	Q
Case Number format is default.	
Case Number is Required.	CANCEL SEARCH

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

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

File into Existing Case	×
Location ★ Select ÷ Location is Required.	$\mathbf{O}$
Case number format is default. Case Number *	<b>K</b>
Case Number is Required.	CANCEL SEARCH

Figure 10.6 – File into Existing Case Window—Excludes Party Name Option

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



SEARCH

The case that matches your search criteria is displayed.

≡ 🤹 eFile Case Search			<b>ଡ</b> - ⊕-	<b>III- 1 M</b> (1997) (1997) (1997)
Location: OFS QA 2014 - Court at Law Case N	umber: CC-19-1245			
Case # CC-19-1245				
OFS QA 2014 - Court at Law	Case Category Civil	Case Type Landlord / Tenant		
← DASHBOARD				REFINE SEARCH

#### Figure 10.7 – Case Search Results

3. Click to file into the case.

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



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

ADD PARTY

#### If your system is configured with this capability,

is displayed on the *Parties* page.

- 5. On the Filings page, select the filing type from the Filing Type drop-down list.
- 6. Select the filing code from the Filing Code drop-down list.

- 7. Type a description in the Filing Description field.
- 8. Type a client reference number in the **Client Reference Number** field.
- 9. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
- 10. if you need to apply any optional services for the filing, click

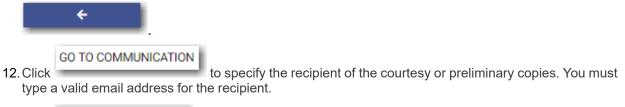
#### The **Optional Services** tab is displayed.

11. To select the applicable optional services, click

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

⇒

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



ASSOCIATED PARTIES

13. Click

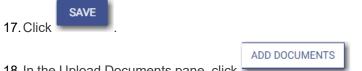
to associate parties with the filing.

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

Associate Parties to this Filing							
First Name	Last Name	Entity	Party Type Select	¢	FILTER	RESET	
Select	Party Name			Party Type			
	Phil Defendant			Defendant			
	Susan Plaintiff			Plaintiff			
Previous 1 Next						2 Result(s) Page 1	l of 1
						CANCEL SAV	Æ

Figure 10.8 – Associate Parties to this Filing Window

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



Upload Documents*							
Component	Name	Actions	Description	Security			
Lead Document		ADD DOCUMENTS	This document is required.				
Attachments		ADD DOCUMENTS					

Figure 10.9 – Upload Documents Pane

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

lot Selected		Selected		
test.pdf	→			
Academic_Calendar	→ ■			
	Drag files here or	BROWSE		
Maximum Filesize: 50.00 MB				
	(TIFF TIF) WordPerfect File (WPD		OC) Portable	
ocument File (PDF) XML Docu	ment (XML) Windows Media File (	WMV) MPEG (MPEG)		

Figure 10.10 – Select document(s) for Lead Document Window

19. Click BROWSE to look for a document to upload. Then, click to select the lead document.				
Note: If you want to delete a document that you have uploaded, click				
20. After you have added all of your lead documents, click				
21. If you have attachments to add to the filing, click ADD DOCUMENTS in the <b>Attachments</b> section.				
22. If you want to add security to any of the documents, select an option from the <b>Security</b> drop-down list.				
23. If you want to add another filing, click . Then, repeat the same steps for the next filing.				
24. After you have added all of the filings, click either or SKIP TO FEES .				
25. On the Service page, add service contacts if applicable. Then, click FEES →				
26. On the Fees page, select the payment account from the Payment Account drop-down list.				

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

28. 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.

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



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

33. When you are satisfied with your filing, click

## Filing into an Existing Case from the Dashboard Page

SUBMIT

To file into an existing case from the Dashboard page:

1. From the Case Search pane, click **Case Search** at the top of the pane, or click to locate the case that you want to file into.

Note: If the specified case is already displayed in the Case Search pane, click the link for that case. The Case Search page is displayed.

The File into Existing Case window is displayed.

File into Existing Case	
Location *	
Select Location is Required.	
Search for a Case by Case Number O Party Name	ų
Case number format is default.	·
Case Number 🗚	
Case Number is Required.	
	CANCEL SEARCH

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

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

Search Cases

File into Existing Case	×
Location * Select   Cocation is Required. Case number format is default.	Q
Case Number * Case Number is Required.	
	CANCEL SEARCH

Figure 10.12 – File into Existing Case Window—Excludes Party Name Option

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



SEARCH

The case that matches your search criteria is displayed on the Case Search page.

≡ 🐝 eFile Case Search			?-	<b>.</b> -	<b></b> -	
Location: OFS QA 2014 - Court at Law Case No	imber: CC-19-1245					
Case # CC-19-1245						
Location OFS QA 2014 - Court at Law	Case Category Civil	Case Type Landlord / Tenant				
← DASHBOARD						REFINE SEARCH

#### Figure 10.13 – Case Search Page

3. Click to file into the case.

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



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

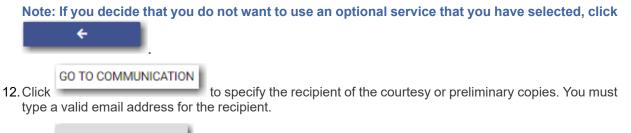
ADD PARTY

#### If your system is configured with this capability,

is displayed on the *Parties* page.

- 5. On the Filings page, select the filing type from the Filing Type drop-down list.
- 6. Select the filing code from the Filing Code drop-down list.

- 7. Type a description in the Filing Description field.
- 8. Type a client reference number in the **Client Reference Number** field.
- 9. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
- GO TO OPTIONAL SERVICES 10. If you need to apply any optional services for the filing, click The **Optional Services** tab is displayed. ⇒ 11. To select the applicable optional services, click Some optional services require that you type the number of services that you need. For those services, the Multiplier will calculate the amount.



ASSOCIATED PARTIES

13. Click

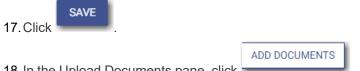
to associate parties with the filing.

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

Associate Parties to this Filing							
First Name	Last Name	Entity	Party Type Select	¢	FILTER	RESET	
Select	Party Name			Party Type			
	Phil Defendant			Defendant			
	Susan Plaintiff			Plaintiff			
Previous 1 Next							2 Result(s) Page 1 of 1
							CANCEL SAVE

Figure 10.14 – Associate Parties to this Filing Window

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



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Upload Documents*					
Component	Name	Actions	Description	Security	
Lead Document		ADD DOCUMENTS	This document is required.		
Attachments		ADD DOCUMENTS			

Figure 10.15 – Upload Documents Pane

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

Not Selected	Selected
test.pdf → 🗊	
Academic_Calendar	
Drag files here of	Dr BROWSE
faximum Filesize: 50.00 MB	
Supported File Types: TIFF Files (TIFF TIF) WordPerfect File (WI	, , , , , ,
Document File (PDF) XML Document (XML) Windows Media File	

Figure 10.16 – Select document(s) for Lead Document Window

19. Click BROWSE to look for a document to upload. Then, click to select the lead document.
Note: If you want to delete a document that you have uploaded, click
20. After you have added all of your lead documents, click
21. If you have attachments to add to the filing, click ADD DOCUMENTS in the <b>Attachments</b> section.
22. If you want to add security to any of the documents, select an option from the <b>Security</b> drop-down list.
23. If you want to add another filing, click . Then, repeat the same steps for the next filing.
24. After you have added all of the filings, click either or SKIP TO FEES .
25. On the Service page, add service contacts if applicable. Then, click FEES →
26. On the Fees page, select the payment account from the <b>Payment Account</b> drop-down list.

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

28. 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.

SUBMIT

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



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

33. 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 File into Existing Case window is displayed.

ile into Existing Case			
Location 🗚			
Select	÷		
Location is Required.			
Search for a Case by Case Number Party Name		K	•
Case number format is default.		•	
Case Number 🖈			
Case Number is Required.			
		CANCEL	EARCH

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

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

File into Existing Case	:
Location *	
Location is Required.	$\cap$
Case number format is default.	
Case Number 🗚	
Case Number is Required.	
	CANCEL SEARCH



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.

S	EA	R	Cŀ	ł

4. Click

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

≡ 🐝 eFile Case Search	<b>?</b> -	⊕-	<b></b> -	• mosern.comgeban,.com •
Location: OFS Non-Integrated Case Number: CC-145333				
No results found. Select 'Refine Search' to change the search criteria.				
If your case is not listed below, you are attempting to efile into a case that has yet to receive an electronic submission and the case is not searchable from the court's case management syst required to manually input the case information. Any additional filings on this case will not require the manual data entry.	em. You a	re still able	to file into	this case, but you will first be
			I DOI	NT SEE MY CASE REFINE SEARCH

Figure 10.19 – 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.

I Don't See My Case			×
You are about to start a manual subseque	nt filing at the following location. Please be sure you have	filtered by case number at the proper location or your filing could b	e delayed by improper numbering.
Location OFS Non-Integrated	Case Number CC-145333	Cases Found O	
BACK TO RESULTS			I UNDERSTAND, CONTINUE

#### Figure 10.20 – I Don't See My Case Window

I UNDERSTAND, CONTINUE

to continue filing into the case.

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

≡ 🐝 Case Information - Draft # 6743 - Case # CC-145333 🚯 -	<b>⋳</b> - ⊕- Ⅲ- <b>⊥</b>
Documents Case Parties Filings Service Fees Summary	
Case Number ★ CC-145333	
Location OFS Non-Integrated	Case Category * Select  Case Category is Required.
Case Type * Select e	Case Sub Type Select •
Case Type is Required.	PARTIES.→

#### Figure 10.21 – 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.

#### Parties 🗲

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 *Case Search* page, or from the *Dashboard* page).

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

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

SUBMIT

4. In the Up	load Documen	ADD DOCUMEN	NTS .	
Upload Docum	nents*			
Component	Name	Actions	Description	Security
Lead Document		ADD DOCUMENTS	This document is required.	
Attachments		ADD DOCUMENTS		

#### Figure 10.22 – Upload Documents Pane

Not Selected		Selected			
test.pdf	→ ■				
Academic_Calendar	→ 💼				
	Drag files here or	BROWSE			
Andrew File days 50.00 MP					
viaximum Filesize: <b>50.00 MB</b>					
	TIFF TIF) WordPerfect File (WPD	) Word 2007 File (DOCX)	) Word 97/XP File (DOC	C) Portable	
Maximum Filesize: <b>50.00 MB</b> Supported File Types: <b>TIFF Files (</b> <b>Document File (PDF) XML Docum</b>			) Word 97/XP File (DOC	C) Portable	
Supported File Types: TIFF Files (			) Word 97/XP File (DOC	C) Portable	

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

Figure 10.23 – Select Document(s) for Lead Document Window

5.	Click to look for a document to upload. Then, click to select the lead document.
	Note: If you want to delete a document that you have uploaded, click
6.	After uploading your documents, click
7.	If you want to add security to any of the documents, select an option from the Security drop-down list
8.	Click to save your entries and to continue.

- 9. On the Service page, add the service contacts that you want to receive a Service Only filing.
- 10. From the service method drop-down list for each service contact, select the service method to use.

Note: The available service method options are configured by Tyler. Some options may not be available on your system.

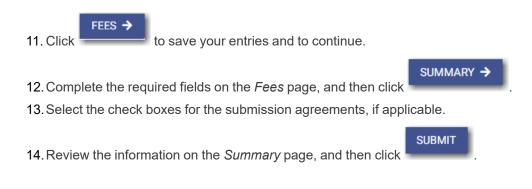
Mail	*
Certified Mail	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Mail	
Eserve	

#### Figure 10.24 – Sample Service Method Drop-Down List

Note: On the *Service* page, you can select the Serve all check box, or you can select the Serve all party contacts check box. Selecting the "Serve all" check box automatically selects the "Serve all party contacts" check box.

ocuments Case	Parties Filings Servi	ce Fees Sur	mmary					
d Service Contacts:	FROM PUBLIC LIST	ADD NEW CONTACT						
arties			Service Conta	cts 🔽 Serve all				Show A
ype: Naintiff	Name: Napier Albert		Serve	Service Method	Name	Email/Mail		Count:
Serve all party contacts			Click to expan	d				
<sup>ype:</sup> Þefendant	Name: Sarah Illene		Serve	Service Method	Name	Email/Mail		Count:
Serve all party contacts			$\checkmark$	Eserve	€ Firm User	@gmail.com	ø	Î
ype: VA	Name: Other Service Contacts		Serve	Service Method	Name	Email/Mail		Count:
			No service co	ntacts				





# **11** Service Contacts

#### Topics covered in this chapter

- Adding a New Service Contact
- Adding a Service Contact from My Firm Service Contact List to a Filing
- Adding a Service Contact from a Public List to a Filing
- Adding a New Service Contact to a Filing
- Updating Information for an Existing Service Contact
- Viewing Attached Case List of Service Contacts
- Updating Information for a Case Service Contact
- Deleting a Service Contact

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

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

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

## Adding a New Service Contact

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

To add a new service contact to your firm's contacts list:

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

The Service Contacts page is displayed.

■ Service Contacts			0- <b>(</b> )	• III• 💄 maaraa aa aa e
First Name	Last Name	Email Address	FILTER RESET	ADD SERVICE CONTACT
First Name	Last Name	Email Address		Actions
Test	Contact	testcontact@gmail.com	n	
Susie 😺	Potter	susiep@gmail.com		1
Pro	Se	gmail.	com	1
Patte	Smith	patte.smith@gmail.com	n	1
Russ	Smith	russ.smith@gmail.com		1
Tonia	Smith	tsmith@gmail.com		
Previous 1 Next				6 Results Page 1 of 1





#### Additional fields are displayed.

First Name	Last Name		Email Address		Actions
					1 🗉 📋
You must provide either an email address or a physical address.					
Add To Firm List		Add to Public List		Last Name *	
First Name is Required.				Last Name is Required.	
Email *		Phone Number			
Email is Required.					
Country United States	¢				
Address Line 1 🖈			Address Line 2		
Address Line 1 is Required.					
City *		State Select	\$	Zip Code *	
City is Required.		State is Required.		Zip Code is Required.	
					CANCEL SAVE

Figure 11.2 – Service Contacts – Additional Fields

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

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

- 4. Complete the required information in the **First Name** and **Last Name** fields. Add a middle name, if applicable, in the **Middle Name** field.
- 5. Type the contact's email address in the Email field.

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

- 6. If applicable, type a phone number in the **Phone Number** field.
- 7. If the contact is in a country other than the United States, select the country from the drop-down list.

#### The default selection is United States.

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

SAVE

13. After you have entered the required information, click

The contact that you added is displayed in the list on the Service Contacts page.

### Adding a Service Contact from My Firm Service Contact List to a Filing

You can add a service contact from your firm's service contact list to a filing. To add a service contact from your firm service contact list to a filing:



1. On the Service page, click

The Firm Service Contacts window is displayed.

Firm	Service Contacts	Associated Partie	s
First Name	9	Last Name	Email FILTER RESET
	Firm Test Admin New Firmcontact Sam James Smithson		)@gmail.com firmccontact@gmail.ccom @tylertech.com james@smithson.com
	Firm User Barbie Watson		@gmail.com barbie@gmail.com 6 Result() Page 1 of 1
First	Previous 1	Next Last	6 Result(s) Page 1 of CANCEL ASSOCIATED PARTIES

Figure 11.3 – Firm Service Contacts Window

2. If you want to filter the list, type at least one letter in a field, and then click

The service contacts that match the information you entered are displayed.

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

ASSOCIATED PARTIES

FILTER

After you have selected the contacts for your filing, click

The Associated Parties window is displayed.

Firm Service Contacts As	sociated Parties	
Select one or more parties to asso	siate with the service contacts	
beleet one of more parties to asso	side with the service contacts.	
arties		
elect Parties		
elected Service Contacts:		
Barbie Watson	barbie@gmail.com	
FIRM SERVICE CONTACTS		CANCEL SAVE
FIRM SERVICE CONTACTS		CANCEL SAVE

Figure 11.4 – Sample Associated Parties Window

5. Select the party that you want to associate with the selected service contact or contacts from the

SAVE

Parties drop-down list, and then click

6. From the service method drop-down list on the *Service* page, select the service method to use for each service contact.

Note: The available service method options are configured by Tyler. Some options may not be available on your system.

Mail	۹.
Certified Mail	
Mail	
Eserve	

Figure 11.5 – Sample Service Method Drop-Down List

Note: if you want to return to the list of service contacts to make any changes or additions, click

FIRM SERVICE CONTACTS

The service contacts that you added are displayed on the *Service* page, along with the service method option that you selected for each contact.

Documents Case Parties	Filings Service Fees	Summary			
FROM MY FIRM	IBLIC LIST	]			
Parties		Service Contacts Serve all			~
Type: Name:		Serve Service Method	Name	Email/Mail	Show i
Defendant Julian Defen	ant				Count
		No service contacts			
ype: Name: Plaintiff Pamela Plain	iff	Serve Service Method	Name	Email/Mail	Count
Serve all party contacts		Click to expand			

Figure 11.6 – Example of a Service Page in a Case Filing

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

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

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

1. On the Service page, click

The Public Service Contacts window is displayed.

Public Serv	rice Contacts As	sociated Parties			
Fill in at lea	st one field and click FILT	ER to display public servic	e contacts.		
First Name	Last Name	Email	Firm	FILTER	RESET
			CANCEL	ASSOCIATED PA	RTIES

FROM PUBLIC LIST

Figure 11.7 – Public Service Contacts Window

2. 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.

FILTER

The n	naximum of 100 public service contac	cts were retu	med.		
First Name	Last Name	Email	Fi	rm	
а				FILTER RE	SET
	xdbbqnmp.update qjnijdqt.update		xdbbqnmp.o	ŋjnijdqt@tylertech.com	
	xsncpywh.update hoopjatu.update		xsncpywh.h	oopjatu@tylertech.com	
	xvbmornb.update tawnxbpw.update	9	xvbmornb.ta	awnxbpw@tylertech.com	
	xyjaqryh jvezoxrv		xyjaqryh.jve	zoxrv@tylertech.com	
	ydfkwmsc.update zadxmwvs.updat	e	ydfkwmsc.z	adxmwvs@tylertech.com	
	yfxbhtia qejdvkgn		yfxbhtia.qej	dvkgn@tylertech.com	
	yvemzhts.update lispdguk.update		rjrxykyo.ykw	wddld@tylertech.com	
	zclyrpby.update bvfbzkcd.update		zclyrpby.bvf	bzkcd@tylertech.com	
	zicpsjbf.update whlrcqyl.update		zicpsjbf.wh	rcqyl@tylertech.com	
	zqwlczsm.update xwoymgnm.upda	te	zqwlczsm.x	woymgnm@tylertech.com	
First	Previous 1 2 3 4 5	6 7 1	lext Last	100 Result(s) Pa	ge 7 of 7

Figure 11.8 – Sample Public Service Contacts List

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

ASSOCIATED PARTIES

- 4. Select the check box for each contact that you want to add.
- 5. After you have selected the contacts for your filing, click

The Associated Parties window is displayed.

Publi	ic Service Contacts	Associated Parties		
Sele	ect one or more parties to	associate with the service c	ontacts.	
Parties	Select Parties	<b>•</b>		
Selecte	d Service Contacts:			
$\checkmark$	xyjaqryh jvezoxrv		xyjaqryh.jvezoxrv@tylertech.com	
PUB	BLIC SERVICE CONTACTS			CANCEL SAVE
		-		

Figure 11.9 – Sample Associated Parties Window

SAVE

6. Select the party that you want to associate with the selected service contacts from the Parties drop-

down list, and then click

140

7. From the service method drop-down list on the *Service* page, select the service method to use for each service contact.

Note: The available service method options are configured by Tyler. Some options may not be available on your system.

Mail	1
Certified Mail	
Mail	
Eserve	

Figure 11.10 – Sample Service Method Drop-Down List

Note: If you want to review the list of public service contacts to make any changes or additions,

	PUBLIC SERVICE CONTACTS
click	

The public service contacts that you added are displayed on the *Service* page, along with the service method option that you selected for each contact.

≡ 🐝 Service - Draft #	6704 🕕 -			0	 	L
Documents Case	Parties Filings Service Fees	Summary				
Add Service Contacts:	ADD NEW CONTACT					
Parties		Service Contacts Serve all				Show All
Type: Defendant	Name: Julian Defendant	Serve Service Method	Name	Email/Mail		Count: 0
		No service contacts				
Type: Plaintiff	Name: Pamela Plaintiff	Serve Service Method	Name	Email/Mail		Count: 1
Serve all party contacts		Click to expand				
← FILINGS SAVE AND E	TIX					FEES ->

Figure 11.11 – Example of a Service Page in a Case Filing

## Adding a New Service Contact to a Filing

You can add a new service contact to a filing. To add a new service contact to a filing:

1. On the Service page, click

ADD NEW CONTACT

The Add Service Contact window is displayed.

Add Service Contact		
Parties Select Parties		·
Add To Firm List	Add to Public List	Last Name <b>*</b>
First Name is Required.		Last Name is Required.
Email * Email is Required.	Phone Number	
Country United States		
Address Line 1	Address Line 2	2
City	State Select	Zip Code
		CANCEL SAVE

Figure 11.12 – Add Service Contact Window

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

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

- 3. Complete the required information in the **First Name** and **Last Name** fields. Add a middle name, if applicable, in the **Middle Name** field.
- 4. Type the contact's email address in the **Email** field.

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

- 5. If applicable, type a phone number in the **Phone Number** field.
- 6. If the contact is in a country other than the United States, select the country from the drop-down list.

#### The default selection is United States.

- 7. If a physical address is required for the service contact, type the address in the Address Line 1 field.
- 8. If applicable, type an address in the Address Line 2 field.
- 9. Type the name of the city in the City field.
- 10. Select the state from the State drop-down list.

11. Type the ZIP code in the **Zip Code** field. SAVE 12. After you have entered the required information, click ASSOCIATED PARTIES 13. After you have added the contact for your filing, click The Associated Parties window is displayed. Associated Parties Public Service Contacts Select one or more parties to associate with the service contacts. Select Parties -Dartice Selected Service Contacts:  $\checkmark$ xyjagryh jvezoxrv xyjagryh.jvezoxrv@tylertech.com PUBLIC SERVICE CONTACTS CANCEL

Figure 11.13 – Sample Associated Parties Window

14. Select the party that you want to associate with the selected service contact from the Parties drop-

down list, and then click

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 *Associated Parties* window.

15. From the service method drop-down list on the *Service* page, select the service method to use for each service contact.

Note: The available service method options are configured by Tyler. Some options may not be available on your system.

Mail	۹.
Certified Mail	
Mail	
Eserve	

Figure 11.14 – Sample Service Method Drop-Down List

The service contact that you added is displayed on the *Service* page, along with the service method option that you selected for the contact.

nts Case I	Parties Filings S	ervice Fees Summar	у					
ce Contacts:								
	+ FROM PUBLIC LIST	ADD NEW CONTACT						
		Serv	rice Cont	acts Serve all				st
	lame: Julian Defendant	Serv	/e	Service Method	Name	Email/Mail		Co
		No s	service c					
	lame: Pamela Plaintiff	Serv		Service Method	Name	Email/Mail		Co
e all party contacts		Clici	k to expa	ind				
e all party contacts GS SAVE AND EXIT		Clici	k to expa	ind				

Figure 11.15 – Example of a Service Page in a Case Filing

## Updating Information for an Existing Service Contact

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

To update the information for an existing service contact:

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

The Service Contacts page is displayed.

E 🐝 eFile Service Contacts			<b>0</b> - <b>•</b> -	
irst Name	Last Name	Email Address	FILTER RESET	ADD SERVICE CONTACT
First Name	Last Name	Email Address		Actions
Test	Contact	testcontact@gmail.com		1
Susie 🔓	Potter	susiep@gmail.com		1
Pro	Se	gmail.com	1	1
Patte	Smith	patte.smith@gmail.com		1
Russ	Smith	russ.smith@gmail.com		1
Tonia	Smith	tsmith@gmail.com		1
Previous 1 Next				6 Results Page 1 of

Figure 11.16 – Service Contacts Page

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

The additional fields for the specified service contact are displayed with the information that you previously entered.

SAVE

3. Update the information, as applicable.



## Viewing Attached Case List of Service Contacts

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

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

To view the case list that is attached to a service contact:

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

The Service Contacts page is displayed.

■ Service Contacts			<b>⊙</b> ∙ ⊕•	<b></b>
First Name	Last Name	Email Address	FILTER RESET	ADD SERVICE CONTACT
First Name	Last Name	Email Address		Actions
Test	Contact	testcontact@gmail.com		1
Susie 🔓	Potter	susiep@gmail.com		1
Pro	Se	lgmail.com		1
Patte	Smith	patte.smith@gmail.com		1
Russ	Smith	russ.smith@gmail.com		1
Tonia	Smith	tsmith@gmail.com		1
Previous 1 Next				6 Results Page 1 of



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.

Service Contact A	ttached Cases		×
Case Number	Location	Case Description	
CC-19-226	OFS QA 2018		
	OFS QA 2017		
	OFS QA 2017		
Download Attached Cases	5		
		CLC	OSE

Figure 11.18 – Service Contact Attached Cases Window

3. Click **Download Attached Cases** to download the case list to an Excel file.

The attached cases are listed on the Excel spreadsheet.

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

Service Contact Attached Cases	×
There are no cases related to this service contact.	
CLOSE	

Figure 11.19 – Service Contact Attached Cases Window – No Attached Cases

## Updating Information for a Case Service Contact

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

To update the information for a case service contact:

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

The *Filing History* page is displayed.

E V eFile Filing History					Ø· ⊕· Ⅲ·	A marticlerigenes. (18) -		
Filing History Filter	FILING HISTORY FILING					10 Result(s) Page 1 of 1		
Created By		velope # 165241   Ve  EXECUTE 165241  Ve  EXECUTE 165243  EXECUTE 165243 EXECUTE 16524 EXECUTE 16524 EXECUTE 16524 EXECUTE 1652 EXECUTE						
My Filings     My Firm	Envelope # 1652+1 Submitted 01	Filing Code	Filing Type	Film Description	Cleant Ref #			
Status	Submitted	Appointment	eFile Only	Pring Description	Contra Mari V	8		
All Statuses     Accepted     Cancelled	Envelope # 1 Envelope # 165228 Submitted 01	65228 1/28/2020 10:39 AM on behalf of Sam Smith by Firm Admin						
Cancened     Cancened     Served     Served     Receipted	Filing Status Submitted	Filing Code Abstract Of Judament	Filing Type eFile Only	Filing Description	Client Ref #	×		
O Submitted O Submitting	Case # 1234							
Location	Envelope # 165224 Submitted 01	1/28/2020 8:47 AM on behalf of Sam Smith by Firm Admin						
Any Location :	Filing Status Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #			
Case Number / Envelope Number	Envelope # 1		chic dia ocho					
Case Number		1/28/2020 8:29 AM on behalf of Sam Smith by Firm Admin						
Envelope Number	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #			
Date Range	SubmissionFailed	Appendix	eFile Only					
Anytime Last Month Last Week	Case # CC-19 Envelope # 165222 Submitted 01	9-3477 1/28/2020 8.23 AM on behalf of Sam Smith by Firm Admin						
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8		
From Date	Envelope # 1	Envelope # 165221						
To Date	Envelope # 165221 Submitted 01	Envelope # 155221 Submitted D1/20/2020 #17 AM on behalf of Sum Smith by Firm Admin						
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #			

#### Figure 11.20 – Filing History Page

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



The service contacts for the case are displayed.



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

The Update Service Contact window is displayed.

Update Service Contact			
Parties × <b>b b</b>		× •	
Add To My List	Add to Public List		
First Name <b>*</b> Tonia	Middle Name		Last Name <b>*</b> Smith
Email <b>*</b> tsmith@gmail.com	Phone Number		
Country United States			
Address Line 1 <b>*</b> 555 Main Street		Address Line 2	
City <b>*</b> Des Moines	State lowa	\$	Zip Code <b>*</b> 33355
			CANCEL SAVE

Figure 11.21 – Update Service Contact Window

5. Update the information for the service contact, and then click

## SAVE

## **Deleting a Service Contact**

You can delete a contact from your service contacts list if you no longer need that contact. To delete a service contact from the *Service Contacts* page:

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

The Service Contacts page is displayed.

E 🐝 eFile Service Contacts			<b>⊙</b> - ⊕-	
First Name	Last Name	Email Address	FILTER RESET	ADD SERVICE CONTACT
First Name	Last Name	Email Address		Actions
Test	Contact	testcontact@gmail.com		
Susie 🔓	Potter	susiep@gmail.com		
Pro	Se	gmail.co	om	
Patte	Smith	patte.smith@gmail.com		
Russ	Smith	russ.smith@gmail.com		
Tonia	Smith	tsmith@gmail.com		
Previous 1 Next				6 Results Page 1 of

#### Figure 11.22 – 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.

# **12** Templates

#### Topics covered in this chapter

- Adding a Template
- Editing a Template
- Using a New Case Template
- Using an Existing Case Template
- Copying a Template
- Deleting a Template

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

## Adding a Template

To add a template that you can use to quickly start a new case or file into an existing case:

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

The *Templates* page is displayed.

≡ 🐝 eFile Templates			Ø- #- I	🛛 • 🔹 konstructuit typosano
Filter Type Firm Templates	Name	<b>FILTER</b> RESET		ADD TEMPLATE
Favorite	Name	Туре		Actions
*	Tech Pubs Test	New Case		🖻 🖍 🗄
☆	test	Existing Case		/ :
☆	Template XYZ	New Case		1
☆	Template ABC	New Case		🖻 🖍 🗄
Previous 1 Next				4 Results Page 1 of 1





A pane is displayed.

Favorite	Name	Туре		Actions
☆		New Case		🖻 🖊 🗄
Favorite		Name 🗚	New Case O Existing Case	
		Name is Required.		
				CANCEL SAVE EDIT DETAILS →

Figure 12.2 – Templates Pane

- 3. Type a name for the template in the **Name** field.
- 4. Select either the New Case or the Existing Case option.
- 5. Select the **Favorite** check box if you want to designate this template as a favorite.

#### EDIT DETAILS 🗲

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

Documents Case Parties Filings Service Fees	Summary					
Case	Cenapry		7.00		1	
OFS MockCMS Procedures / Normedice	Civil tamage Answer Over \$5000		Tipe Fraud			Case Parties
Parties					Show Al	Filings Service
Filings					1	SAVE TEMPLATE
rmu rue eFile Only	Pileg Code Acknowledgement	Chief Ref #		Pling Description		
Corporate Lead Document Exercised Moses Original	Sources toms test.pdf	European Acknowledgement		Security		
Service taut 4 None					1	G
Fees Papers Accust Mary Ann's Walver					1	
				Wa	iver Selected	
+ FEES SAVE AND EXIT				SAVE	TEMPLATE	

#### Figure 12.3 – Sample Summary Page

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.

SAVE TEMPLATE

## **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.

= 🐝 eFile Templates			<b>0</b> - ⊕- <b>Ⅲ</b> - <b>⊥</b>
ilter Type Firm Templates	Name 🗢	FILTER RESET	ADD TEMPLATE
Favorite	Name	Туре	Actions
*	Tech Pubs Test	New Case	
☆	test	Existing Case	A :
☆	Template XYZ	New Case	
	Template ABC	New Case	
Previous 1 Next			4 Results Page 1 o





The template name is displayed in a separate pane.

Note: You can change the template name if you want.

3. Click

EDIT DETAILS ->

The *Case Information* page is displayed. Any information that you previously entered on this page remains.

- 4. Make any changes that you want on the Case Information page.
- 5. If you entered information on any other pages in your template, make changes as needed to those

SAVE AND EXIT

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.

= 🐝 eFile Templates					8-	<b>.</b>	<b></b> -	Email: 0.000 (0.000)
Filter Type Firm Templates	Name \$		FILTER	RESET				ADD TEMPLATE
Favorite		Name		Туре				Actions
*		Tech Pubs Test		New Case				۱
☆		test		Existing Case				Ø :
☆		Template XYZ		New Case				🖻 🖊 🗄
☆		Template ABC		New Case				Image:
Previous 1 Next								4 Results Page 1 of 1

Figure 12.5 – 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.

M

- 3. Enter the remaining required information for the new case until you reach the *Summary* page.
- 4. Review the summary of the case filing. After you are satisfied with the information in your filing, click SUBMIT

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

## Using an Existing Case Template

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

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

The Filing History page is displayed.

File Filing History					0- (	)- ≣-	
Filing History Filter	FILING HISTORY FILING DRAFTS	Ν					10 Result(s) Page 1 of 1
Created By	Envelope # 165241 Envelope # 165241 Schmitted (1/22/2020 3/4) FM on behalf of Sem Smith by Film Admin						
My Filings     My Firm	Filmo Satua	Filma Code	Filing Type	Film Description	Client Ref #		
Status	Submitted	Appointment	eFile Only				8
All Statuses     Accepted     Cancelled	Envelope # 165228 Submitted 01/28/2020 1	8 0.39 AM on behalf of Sam Smith by Firm Admin					
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #		8
O Submitting	Case # 1234 Envelope # 165224 Submitted 01/28/2020 B	47 AM on behalf of Sam Smith by Firm Admin					
Any Location 🔹	Filing Status Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #		
Case Number / Envelope Number	Envelope # 16522						
Case Number		29 AM on behalf of Sam Smith by Firm Admin					
Envelope Number Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #		
Anytime     Last Month     Last Week	Case # CC-19-347						
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #		8
From Date	Envelope # 16522	1 17 AM on behalf of Sam Smith by Firm Admin					
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #		

Figure 12.6 – Filing History Page

2. Locate the case that you want to file into, and then click

A drop-down list is displayed.

3. Click File Into Case With Template.

The *Templates Matching* window is displayed, along with a list of available templates.

ter Type		Name		
Firm Tem	plates	\$	FILTER	RESET
Location/	Type/Category m	atches the case, each temp en if there are mismatches.	, and Case Category to your templates. If the te plate section will be created on the draft. The templates are listed in best match order. If	
template	s documents or op		ate the entire template, but your draft might no	
			ate the entire template, but your draft might no Template Matches On <b>@</b>	t include the Actions
template	s documents or op			

Figure 12.7 – 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 *Upload Documents* page. The fields that you previously entered when the template was created are auto-filled.

- 5. Enter the remaining required information for the new case until you reach the Summary page.
- 6. Review the summary of the case filing. After you are satisfied with the information in your filing, click SUBMIT

\_\_\_\_

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

## Copying a Template

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

To copy an existing template:

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

The Templates page is displayed.

≡ 🐝 eFile Templates				Ø- (	)- Ⅲ-	La Filleric Contageneers. Colo -
iter Type Firm Templates	Name		FILTER RESET			
Favorite		Name	Туре			Actions
*		Tech Pubs Test	New Case			۱
☆		test	Existing Case			Ø
☆		Template XYZ	New Case			1
		Template ABC	New Case			۱
Previous 1 Next						4 Results Page 1 o

Figure 12.8 – Templates Page

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

A drop-down list is displayed.



Figure 12.9 – 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 make changes to the template.

EDIT DETAILS →

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.

≡ 🐝 eFile Templates				(	9-	<b>.</b> -	<b></b> -	• • • • • • • • • • • • • • • • • • •
Filter Type Firm Templates	Name \$		FILTER RESET					ADD TEMPLATE
Favorite		Name	Туре					Actions
*		Tech Pubs Test	New Case					🖻 🖌 🗄
☆		test	Existing Case					<ul> <li>Image: Image: Ima</li></ul>
☆		Template XYZ	New Case					🖻 🖊 🗄
☆		Template ABC	New Case					🖻 🖍 🗄
Previous 1 Next								4 Results Page 1 of 1

Figure 12.10 – Templates Page

2	I exert the templete that you want to delete, and then elick		-
Ζ.	Locate the template that you want to delete, and then click	-	

A drop-down list is displayed.



Figure 12.11 – 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.	Сlick	to dele	te the template, or click to cancel the action.
	If you clicked	ОК	, a confirmation message is displayed, and the template is deleted.

## **13** Filings

#### Topics covered in this chapter

- Copying the Envelope
- Viewing the Envelope Details
- Viewing Case Address Information in the Envelope Details
- Viewing Mail Service Fees in the Envelope Details
- Viewing Certified Mail Services Information in Envelope Details
- Resuming a Case Filing
- Deleting a Draft Filing
- Canceling a Filing

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

## Copying the Envelope

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

#### To copy an envelope:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.

= 🐝 eFile Filing History					<b>0</b> - ⊕- <b>Ⅲ</b> -				
Filing History Filter	FILING HISTORY FILING DRAFTS	N				10 Result(s) Page 1 of 1			
Created By	Envelope # 16524	-1							
My Filings My Firm	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #				
Status	Submitted	Appointment	eFile Only			8			
All Statuses     Accepted     Cancelled     Receipted	Envelope # 165228 Envelope # 165228 Submitted 01/28/2020 1	8 0.39 AM on behalf of Sam Smith by Firm Admin							
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #				
O Submitting		Case # 1234 Enrologe # 16524 Submitted 01/202010 Ext7 AM on behalf of Sum Smith by Firm Admin							
Any Location 0	Filing Status Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #				
Case Number / Envelope Number	Envelope # 16522	3							
Case Number		:29 AM on behalf of Sam Smith by Firm Admin							
Envelope Number									
Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #				
Anytime     Last Month     Last Week	Case # CC-19-347 Envelope # 165222 Submitted 01/28/2020 8	7 :23 AM on behalf of Sam Smith by Firm Admin		🖻 🖴 😳					
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8			
From Date		Envelope # 165221  Envelope # 165221  Envelope # 165221 Summed 1/5221 Summed 1/22/2020 817.4M on behalf of Sam Smith by Fim Admin							
RESET FILTER	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #				

FILTER

Figure 13.1 – Filing History Page

2. In the Status pane, select Returned, and then click

The returned cases are displayed, per the filter that you set.

3. Locate the envelope that you want to copy.





Figure 13.2 – More Options Drop-Down List

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

=- <b>%</b>	EFILE QA 01	Upload Docum	nents - Draft #	602 - Case # C	C-21-065 - To	m Mattisonv.Jul	Rivers (	•			<b>?</b> -	<b>.</b>	<b></b> -	<b>1</b>		-
Documents	Case	Parties	Filings	Service	Fees	Summary	$\rangle$									
This is a cop	This is a copy of envelope 251036. Please verify all information before submitting.															
								🚯 Drag files here o	or BROWSE							
	Animum Filesize: 50.00 MB apported File Types: TBF Files (TIFF TIF) WordPerfect File (WPO) Word 2007 File (DOCX) Word 97/XP File (DOC) Portable Document File (PDF) XML Document (XML) Windows Media File (WMV) MPEG (MPEG).															
SAVE AND EXIT												SK	IP TO FILING	\$→→	CASE INFORMA	TION ->

Figure 13.3 – Sample Upload Documents Page for a Copied Envelope

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



👼 🤸 Summary - Draft # 7944 - Case # CV-2019-12731679 - In Th	ne Matter Of a b			@• ⊕• ⊞• <b>≜</b>
Documents Case Parties Filings Service	Fees Summary			
Submission Agreements				
Case				Agreements
This is a copy of envelope 703945. Please verify all information b	refore submitting.			Case
Uncation OFS MockCMS	Category Civil		Tier Name Change	Parties Filings
Parties				Row All Fees
Filings				SUBMIT
File Only	Piling Ericle Acknowledgement	Class Part P	Filing Description	
Component Lead Document Docimianal Yorano Grigonal	Document Name test.pdf	Devotation Acknowledgement	Security	
Service court 0 None				,
Fees Promote Assesser New Account	rang anony firm attorney	much many-matrix to max $a \; b \;$	rai 190 Default	/
\$ Service Fees Total Service Fees Convenience Fee				51.00 91.00
Total Court Service Fees				51.00 Sub Total \$3.00
				Grand Total \$3.00 BACK TO TOP

Figure 13.4 – Sample 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.

= 🐝 eFile Filing History					<b>0</b> ∙ ⊕• <b>≡</b> •	L (100071) (1111000000) (1100-			
Filing History Filter	FILING HISTORY FILING D					10 Result(s) Page 1 of 1			
Created By	Envelope # 16								
My Filings     My Firm	Envelope # 165241 Submitted 01/	(28/2020 3:49 PM on behalf of Sam Smith by Firm Admin	Filing Type	Filing Description	Client Ref #				
Status	Submitted	Appointment	eFile Only			×			
All Statuses     Accepted     Cancelled		Invelope # 165228 sekset 61/02/020 109 AM on behalf of Sam Smith by Fern Admin							
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8			
O Submitting	Case # 1234 Envelope # 165224 Submitted 01,	28/2020 B-47 AM on behalf of Sam Smith by Firm Admin				n 🖻 🖬 🗄			
Any Location	Filing Status     Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #				
Case Number / Envelope Number	Envelope # 16					B 💷 🗄			
Envelope Number	Envelope # 165223 Submitted 01/	28/2020 8:29 AM on behalf of Sam Smith by Firm Admin							
Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #				
Anytime     Last Month     Last Week	Case # CC-19 Envelope # 165222 Submitted 01/	-3477 28/2020 8:23 AM on behalf of Sam Smith by Firm Admin				n 🖹 🗄 🗄			
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	×			
From Date	Envelope # 16	55221				B 💷 🗄			
To Date		Envelope # 165221 Submitted 31/28/2020 8:17 AM on behalf of Sum Smith by Firm Admin							
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #				

Figure 13.5 – Filing History Page

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

The envelope details are displayed.

Note: For subsequent filings, the envelope details do NOT include newly-added parties if the envelope has not been accepted yet.

Details - Envelope # 745447				PRNT CLOSE
Case	Category Civil		7994 Wrongful Death	
Parties Cover 2				Show All
Filings				
nturg tipe eFile Cruhy Dalement Cree 12/16/19 4:54 PM	Pling Code Motions Satur Submitted	Olices Ref # Review Date	Filing Description	
Component Leed Document Downlast Vision Original	Document Name test.pdf	Georgeon	seorry Confidential (T)	
Service				Hide all
marty ales weigladg.com Status: Not Sent Associated Parties Nave	Service Method: Eserve			
Fees Prinner keiner waher Georg	Purij Seponstilio for Pees Poli Defendant Transcritor Regional	Flor Type Default transfortu Jonant 50.00	function 0	
				Total \$0.00 Waiver Selected
				CLOSE

Figure 13.6 – Sample Envelope Details Page

4. Click **PRINT** 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.

= 🐝 eFile Filing History					<b>0</b> ∙ ⊕• <b>≡</b> •	L (100071) (1111000000) (1100-			
Filing History Filter	FILING HISTORY FILING D					10 Result(s) Page 1 of 1			
Created By	Envelope # 16								
My Filings     My Firm	Envelope # 165241 Submitted 01/	(28/2020 3:49 PM on behalf of Sam Smith by Firm Admin	Filing Type	Filing Description	Client Ref #				
Status	Submitted	Appointment	eFile Only			×			
All Statuses     Accepted     Cancelled		Invelope # 165228 sekset 61/02/020 109 AM on behalf of Sam Smith by Fern Admin							
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8			
O Submitting	Case # 1234 Envelope # 165224 Submitted 01,	28/2020 B-47 AM on behalf of Sam Smith by Firm Admin				n 🖻 🖬 🗄			
Any Location	Filing Status     Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #				
Case Number / Envelope Number	Envelope # 16					B 💷 🗄			
Envelope Number	Envelope # 165223 Submitted 01/	28/2020 8:29 AM on behalf of Sam Smith by Firm Admin							
Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #				
Anytime     Last Month     Last Week	Case # CC-19 Envelope # 165222 Submitted 01/	-3477 28/2020 8:23 AM on behalf of Sam Smith by Firm Admin				n 🖹 🗄 🗄			
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	×			
From Date	Envelope # 16	55221				B 💷 🗄			
To Date		Envelope # 165221 Submitted 31/28/2020 8:17 AM on behalf of Sum Smith by Firm Admin							
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #				

Figure 13.7 – Filing History Page

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

The envelope details are displayed.

0etails - Envelope # 137873				PRINT CLOSE
Case Leasters OFS QA 2017 Class Address 555 Main Street Dallas, TX 75220 US Dallas	Category Civil		որբ Notice Of Removal	
Parties Count 2				Show All
Filings Filing Type eFile Only tuberined Date 03/11/2021 5:56 PM	Filing Code Acknowledgement Status Submitted	Client Ref # Review Data	Filing Description	
Component Lead Document Download Version Original	Document Name Academic_Calendar_Spring_2019.pdf	Description	Security Confidential (G)	
Service Count: 0 None				
Fees Payment Account Waiver Order 10	Filling Attorney Perry Mason Transaction Response	Party Responsible for Faces John Doe Translation Amount \$0.00	Plar Type Default Transaction D	
				Total \$0.00 Waiver Selected
				CLOSE

Figure 13.8 – Case Address Information on the Envelope Details Page

4. Click to print a copy of the envelope details.

## Viewing Mail Service Fees in the Envelope Details

You can view the mail service fees in the envelope details.

Note: This 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.

= 🐝 eFile Filing History					<b>0</b> ∙ ⊕• <b>≡</b> •	L (100071) (1111000000) (1100-			
Filing History Filter	FILING HISTORY FILING D					10 Result(s) Page 1 of 1			
Created By	Envelope # 16								
My Filings     My Firm	Envelope # 165241 Submitted 01/	(28/2020 3:49 PM on behalf of Sam Smith by Firm Admin	Filing Type	Filing Description	Client Ref #				
Status	Submitted	Appointment	eFile Only			×			
All Statuses     Accepted     Cancelled		Invelope # 165228 sekset 61/02/020 109 AM on behalf of Sam Smith by Fern Admin							
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8			
O Submitting	Case # 1234 Envelope # 165224 Submitted 01,	28/2020 B-47 AM on behalf of Sam Smith by Firm Admin				n 🖻 🖬 🗄			
Any Location	Filing Status     Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #				
Case Number / Envelope Number	Envelope # 16					B 💷 🗄			
Envelope Number	Envelope # 165223 Submitted 01/	28/2020 8:29 AM on behalf of Sam Smith by Firm Admin							
Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #				
Anytime     Last Month     Last Week	Case # CC-19 Envelope # 165222 Submitted 01/	-3477 28/2020 8:23 AM on behalf of Sam Smith by Firm Admin				n 🖹 🗄 🗄			
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	×			
From Date	Envelope # 16	55221				B 💷 🗄			
To Date		Envelope # 165221 Submitted 31/28/2020 8:17 AM on behalf of Sum Smith by Firm Admin							
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #				

Figure 13.9 – Filing History Page

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

The mail service fees are displayed in the envelope details.

Details - Case # CC-21-117 - Envelope # 256	195			PRINT CLOSE
Case				
OFS QA 2017	Galegory Civil		Ine Appeal	
Parties Caset 2				Show All
Filings				
Mang Type eFile Only	Hing Code Abstract Of Judgment	Class t Fad #	Filmg Description	
Suberrited Date 01/21/2021 11:13 AM	itaka Accepted	Tennero Ustan 01/21/2021 11:16 AM	Comments Auto Review Accepted	
Companient Attachments Downland Venion	Document Name Petition, pdf	Description	ilenarity Public (G)	
Original Carpoint Lead Document Doveliad/Verion	Court Copy Document Name Blank Test.pdf	Decaption	Security Public (G)	
Original	Court Copy			
Service				Show All
Fees				
Payment Account Firmf's CC Order ID 000256195-0	Hing Atomy Abby Carmichael Thereadon Hingcrose Approved	Party Prespondiel for Frees Nacomi Watsson Instanct Americant \$20.00	File Type AutoReview Inseadon ID 250829	
Abstract Of Judgment				^
Filing Fee				\$5.00 Subtotal \$5.00
Mail Service Fees				^
Total Mail Service Fees				\$12.00 Subtotal \$12.00
Service Fees				^
Convenience Fee Total Filing & Service Fees Total Court Service Fees				\$1.00 \$1.00 \$1.00 \$1.00 Subtotal \$3.00
				Grand Total \$20.00
				CLOSE

Figure 13.10 – Sample Envelope Details Page with the Mail Service Fees Displayed

4. 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: This 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.

= 🎸 •File Filing History						0- ⊕- ≣-	merciriyanı.cis				
Filing History Filter			DRAFTS				10 Result(s) Page 1 of 1				
Created By			Envelope # 165241								
My Filings		Envelope # 165241 Submitted 0	1/28/2020 3:49 PM on behalf of Sam Smith by Firm Admin								
O My Firm		Filing Status Submitted	Filing Code Appointment	Filing Type eFile Only	Filing Description	Client Ref #	•				
Status				erile Only			<u> </u>				
<ul> <li>All Statuses</li> <li>Accepted</li> </ul>		Envelope # 1	65228				🗈 💷 🗄				
O Cancelled		Envelope # 165228 Submitted 0	1/28/2020 10:39 AM on behalf of Sam Smith by Firm Admin								
O Receipted O Served		Filing Status	Filing Code	Filing Type	Filing Description	Client Bef #					
O Returned		Submitted	Abstract Of Judgment	eFile Only			8				
O Submitted		Case # 1234									
O Submitting			Case # 1234								
Location		Envelope + 165224 Submitted o	1/26/2020 6:47 AM OF BENAL OF SAM SHOLDY HIM ADMIN								
Any Location	٠	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #					
Case Number / Envelope Number		Accepted	Action - Subsequent Only	eFile and Serve							
Case Number		Envelope # 1					Image:				
Envelope Number		Envelope # 165223 Submitted 0	1/28/2020 8:29 AM on behalf of Sam Smith by Firm Admin								
	_	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #					
Date Range		SubmissionFailed	Appendix	eFile Only							
Anytime     Last Month		Case # CC-19	9-3477				🖻 🗈 🗄				
O Last Week		Envelope # 165222 Submitted 0	1/28/2020 8:23 AM on behalf of Sam Smith by Firm Admin								
O Last Two Days O Today		Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #					
O Pick a Custom Range		Submitted	Acknowledgment Of Paternity	eFile Only							
From Date		Envelope # 1	65221								
To Date	8		1/28/2020 8:17 AM on behalf of Sam Smith by Firm Admin								
		Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #					
RESET	ĸ	UnderReview	Complaint - w/ Hearing	eFile Only							

Figure 13.11 – Filing History Page

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

The envelope details are displayed.

ase				
ation S QA 2017	Category Civil		ype Breach Of Contract	
arties				Show
lings				
Filing Type eFile Only Submitted Date 01/21/2021 10:32 AM	Filing Code Abstract Of Judgment Status Accepted	Client Ref # Review Date 01/21/2021 10:35 AM	Filing Description Comments Auto Review Accepted	
Component Lead Document	Document Name BlankTest.pdf	Description	Security Public (G)	
Download Version Original	Court Copy			
ervice				Hide
Firm Admin P@gmail.com Status: Sent (Opened) Served Date: 01/21/2021 10:35 AM	Service Method: Eserve	Lillian Henderson 1201 tenth ave Plano US, Texa Status: Not Sent		
Associated Parties: None	Opened Date: 01/21/2021 11:08 AM	Tracking: 0000000000000000	000075025 (USPS)	
Raymond Thompson 4201 Ohio Dr Dallas US, Texas 51atus: Not Sent Tracking: 000000000000000000000075024 (USPS	Service Method: Mail			

Figure 13.12 – Sample Envelope Details Page

In the Service pane, you can view the information related to the certified mail for a specified filing.

4. 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.

5. 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.

### **Resuming a Case Filing**

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

#### To resume a case filing:

1. Locate the specified draft on the *Filing Drafts* page.

≡ 🐝 eFile Filing Drafts					<b>0</b> -	<b>.</b>	<b></b> .	• ************************************
Filing Drafts Filter	FILING HISTORY FILING	DRAFTS						23 Result(s) Page 1 of 2
Created By	Case # CC-19 Draft # 6749 Started 11/5/19 9:							
<ul> <li>My Filings</li> <li>My Firm</li> </ul>	Filing Status	Filing Code	Filing Type	Filing Description		Clier	t Ref #	
Location	Draft		eFile Only					
Any Location +	Draft # 6722 Draft # 6722 Started 10/31/19 2	:33 PM by Firm Admin						
Case Number / Draft Number	Filing Status	Filing Code	Filing Type	Filing Description		Clier	t Ref #	
Case Number	Draft	Acknowledgement	eFile and Serve	Acknowledgement				
Draft Number	Case # CC-19	9-3477						
Date Range	Draft # 6702 Started 10/30/19 2	30 PM on behalf of Jack Stone by Firm Admin						
Anytime     Last Month	Filing Status UnexpectedError	Filing Code Acknowledgement	Filing Type eFile and Serve	Filing Description Acknowledgement		Clier	t Ref #	
O Last Week	Draft # 6689							
O Last Two Days O Today	Draft # 6689 Started 10/28/19 5	31 PM on behalf of Abby Carmichael by Firm A	Admin					
O Pick a Custom Range	Filing Status Draft	Filing Code Proposed Order	Filing Type eFile Only	Filing Description Proposed Order		Clier	t Ref #	
To Date	Case # cc-14							
	Draft # 5611 Started 10/15/19 9							
RESET FILTER	Case # CC-19							
	Draft # 5610 Started 10/15/19 9	:17 AM by Firm Admin						

Figure 13.13 – Filing Drafts Page



The filing opens on the Upload Documents page.

- 3. Navigate through the case filing to the page where you left off. Make any corrections to your entries as needed.
- 4. Continue completing the remaining required fields for the filing.
- 5. After you have completed all of the required fields, click

### **Deleting a Draft Filing**

You can delete a draft filing that you no longer need.

#### To delete a draft filing:

1. On the Dashboard menu, click Filing Drafts.

The Filing Drafts page is displayed.

SUBMIT

≡ 🐝 eFile Filing Drafts					<b>⋳</b> - ⊕- Ⅲ-	L
Filing Drafts Filter		NG DRAFTS				23 Result(s) Page 1 of 2
Created By	Case # CC-1 Draft # 6749 Started 11/5/19					
<ul> <li>My Filings</li> <li>My Firm</li> </ul>	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Location	Draft # 6722	<u>ר</u>	eFile Only			
Any Location \$	Draft # 6722 Started 10/31/1	_				
Case Number / Draft Number	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Case Number	Draft	Acknowledgement	eFile and Serve	Acknowledgement		
Draft Number	Case # CC-1	19-3477				
Date Range	Draft # 6702 Started 10/30/1	9 2:30 PM on behalf of Jack Stone by Firm Admin				
Anytime     Last Month	Filing Status UnexpectedError	Filing Code Acknowledgement	Filing Type eFile and Serve	Filing Description Acknowledgement	Client Ref #	
O Last Week	Draft # 6689	9				
O Last Two Days O Today	Draft # 6689 Started 10/28/1	9 5:31 PM on behalf of Abby Carmichael by Firm A	ldmin			
O Pick a Custom Range From Date	Filing Status Draft	Filing Code Proposed Order	Filing Type eFile Only	Filing Description Proposed Order	Client Ref #	
To Date	Case # cc-1	45333				
	Draft # 5611 Started 10/15/1					
RESET FILTER	Case # CC-1	19-3477				
	Draft # 5610 Started 10/15/1	9 9:17 AM by Firm Admin				

Figure 13.14 – Filing Drafts Page

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

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



### 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.

■      ✓      ●      File Filing History					0- ⊕- ≣-	
Filing History Filter	FILING HISTORY FILING DF					10 Result(a) Page 1 of 1
Created By	Envelope # 16	5241				
My Filings     My Firm	Envelope # 165241 Submitted 01/2	8/2020 3:49 PM on behalf of Sam Smith by Firm Admin	Filing Type	Filing Description	Client Ref #	
Status	Submitted	Appointment	eFile Only			8
All Statuses     Accepted     Cancelled	Envelope # 16 Envelope # 165228 Submitted 01/2	5228 8/2020 10:39 AM on behalf of Sam Smith by Firm Admin				
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8
O Submitting	Case # 1234					🖻 🖪 🗄
Location	Envelope # 165224 Submitted 01/2	8/2020 8:47 AM on behalf of Sam Smith by Firm Admin				
Any Location 0	Filing Status Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #	
Case Number / Envelope Number	Envelope # 16					
Case Number		8/2020 8:29 AM on behalf of Sam Smith by Firm Admin				
Envelope Number	Filing Status	Filing Code	Filing Type	Filing Description	Client Bef #	
Date Range	SubmissionFailed	Appendix	eFile Only	ring vession	Calles Her P	
Anytime     Last Month     Last Week	Case # CC-19- Envelope # 165222 Submitted 01/2	-3477 8/2020 8:23 AM on behalf of Sam Smith by Firm Admin				n 🖻 🗉 🗄
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	
From Date	Envelope # 16	5221				
To Date		18/2020 8:17 AM on behalf of Sam Smith by Firm Admin				
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #	

Figure 13.15 – 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.



The following warning message is displayed: Are you sure you want to cancel this filing?

4. Click to cancel the filing, or click to cancel the action.

If you clicked

, a confirmation message is displayed, and the filing is canceled.



#### Topics covered in this chapter

- Creating a Bookmark for a Case
- Removing a Bookmark from a Case
- Viewing a List of Bookmarked Cases

The *Bookmarks* page displays a list of case numbers, locations, and descriptions for the cases that you have bookmarked. Only you can see this information. Neither the public nor any user can see your case list.

≡ 🐝 eFile Bookmarks				<b>9</b> -	<b>.</b>	<b></b> .	A
Bookmark Filter							4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description				
Any Location Case Number	Case # CC-19-2373	Location OFS QA 2017 - Court at Law	Case Description Drina Colin v. McDonald Associates LLC				
Case Number	Case #	Location	Case Description				
Case Description	CC-19-3477	OFS QA 2017					
Case Description           RESET         FILTER	Case # CC-19-438	Location OFS QA 2018	Case Description				
	Previous 1 Next		C,				4 Results Page 1 of

Figure 14.1 – Sample Bookmarks Page

### Creating a Bookmark for a Case

You can create a bookmark for a case from the *Filing History* page or the *Filing Drafts* page.

#### To create a bookmark for a case:

1. On the Dashboard menu, click either Filing History or Filing Drafts.

The page that you selected is displayed.

2. Locate the case or the draft filing that you want to bookmark, and then click

A drop-down list is displayed.

3. Select Bookmark Case.

The case or draft filing that you bookmarked will now be displayed on the *Bookmarks* page.

### Removing a Bookmark from a Case

You can remove a bookmark from a case that you previously bookmarked.

To remove an existing bookmark from a case:

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

The Bookmarks page is displayed.

≡ 🐝 eFile Bookmarks				Ø-	<b>.</b>	<b></b> .	• ************************
Bookmark Filter							4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description				
Any Location \$	Case #	Location	Case Description				
Case Number	CC-19-2373	OFS QA 2017 - Court at Law	Drina Colin v. McDonald Associates LLC				
Case Number	Case #	Location	Case Description				
Case Description	CC-19-3477	OFS QA 2017	0FS QA 2017				
Case Description	Case #	Location	Case Description				
RESET FILTER	CC-19-438	OFS QA 2018					
	Previous 1 Next						4 Results Page 1 of
	_						

Figure 14.2 – Sample Bookmarks Page

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

A drop-down list is displayed.

3. Select Remove Bookmark.

The following warning message is displayed: Are you sure you want to delete bookmark for Case # "CC-xy-abcd"?

4. Click to remove the bookmark, or click **Cancel** to cancel the action.

### Viewing a List of Bookmarked Cases

You can view a list of the cases that you have bookmarked for quick access. You can filter your view to only the specific cases that you want to see.

To view a list of cases that you have bookmarked:

1. On the Dashboard menu, click Bookmarks.

The Bookmarks page is displayed.

≡ 🐝 eFile Bookmarks				<b>8</b> -	<b>.</b>	<b></b> -	•
Bookmark Filter							4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description				
Any Location	Case #	Location	Case Description				
Case Number	CC-19-2373	OFS QA 2017 - Court at Law	Drina Colin v. McDonald Associates LLC				
Case Number	Case #	Location	Case Description				
Case Description	CC-19-3477	OFS QA 2017					
Case Description	Case #	Location	Case Description				
RESET FILTER	CC-19-438	OFS QA 2018					
	Previous 1 Next						4 Results Page 1 of

Figure 14.3 – Sample Bookmarks Page

2. Set the parameters for the cases that you want to view, and then click

The cases that you selected in your filter are now displayed on the *Bookmarks* page.

FILTER

# 15 Bulk Filing

#### Topics covered in this chapter

- Dashboard
- Starting Multiple New Case Filings
- Uploading Documents for a Bulk Filing
- Entering Case Information for a Bulk Filing
- Entering Party Details for a Bulk Filing
- Entering Filing Details for a Bulk Filing
- Entering Payment Information for a Bulk Filing
- Viewing the Envelope Summary for a Bulk Filing
- Associating Parties to a Bulk Filing
- Filing into Multiple Existing Cases
- Copying a Bulk Filing

Bulk filing allows you to create and submit a group of envelopes in the same group, or bulk. Some courts may provide discounts if a specified number of envelopes is submitted in the same bulk.

#### Note: Bulk filing is configured by Tyler and may not be available on your system.

BULK ADD FILINGS

Bulk filing begins on the *Start Filing* page. Then, complete the required fields for the first filing, followed by the next filing, and so forth. After you have prepared all of the filings for a bulk, you can view the fees for each filing, and choose the party responsible for fees, along with the payment method, for each filing. When you are done, you can submit the bulk 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 using the Bulk Add Filings

feature. Click Filing Dashboard page.

when it is enabled on the Bulk

### Dashboard

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

🔁 Dashboard
Q Case Search
Filing History
🖋 Filing Drafts
🗮 Bulk History
🖋 Bulk Drafts
Bookmarks
Templates
🖀 Firm Users
🔓 Firm Attorneys
🚍 Firm Payment Accounts
Firm Details
Firm Service Contacts
🏟 Account Settings
Reports

Figure 15.1 – Dashboard

From here, you can perform the following actions:

- Access the *Dashboard* page to start an initial or subsequent bulk filing, perform a case search, view your filing history, view your draft filings, access the cases you have bookmarked, and access the templates you have created.
- File into an existing case on the *Case Search* page. For subsequent bulk filings, you can also add cases from the *Case Search* page.
- Access the *Filing History* page to view a list of your or your firm's case filings. For subsequent bulk filings, you can also add cases from the *Filing History* page.
- Access the *Filing Drafts* page to view a list of your or your firm's draft filings.
- Access the Bulk History page to view a list of your or your firm's bulk filings.
- Access the Bulk Drafts page to view a list of your or your firm's bulk draft filings.
- 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 Firm Users page to add and remove firm users.
- Access the Firm Attorneys page to add and remove firm attorneys.
- Access the Firm Payment Accounts page to set up and manage the firm payment accounts.
- View and update your firm information on the Firm Details page.
- Access the Firm Service Contacts page to add and manage the firm's service contacts list.
- Access the Account Settings page to change your system password.
- Access the *Reports* page to generate reports for envelopes and filings that you or your firm submitted.

### **Bulk History**

The Bulk History page includes the filing history for your and your firm's bulk filings.

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

🚍 - 🐝 EFILE QA 01 Bulk Hist	ory				<b>?</b> -	•-	<b></b> -	±
Filing History Filter	FILING HISTORY FILING	DRAFTS BULK HISTORY BULK	DRAFTS					1 Result(s) Page 1 of 1
Created By	Bulk # 135 - B	ulk #15						
O My Filings My Firm	Bulk # 135 Started 04/14/2021 5:0	4 PM by Lauren Groswald						
Bulk Number / Name	Envelope #	157679						
Bulk Number	Envelope # 157679 Submittee	104/14/2021 5:16 PM on behalf of Tim Ande	ws by Lauren Groswald					
Bulk Name	OFS QA 2017							
Status	Filing Status	Filing Code	Filing Type	Filing Description			Client Ref #	
All Statuses     Accepted	Submitted	Acknowledgement	EfileAndServe					
Cancelled Receipted Served Returned Submitted Submitting	Envelope # 157680 Submittee Location OFS QA 2017	157680 104/14/2021 5:16 PM on behalf of Tim Ande	ws by Lauren Groswald					B
Location	Filing Status Submitted	Filing Code Proposed Order	Filing Type EfileAndServe	Filing Description			Client Ref #	8
Any Location +								
Case / Envelope Number	Envelope # 157681 Submitter	157681 104/14/2021 5:16 PM on behalf of Tim Ande	ws by Lauren Groswald					Ľ.
Case Number	Location OFS QA 2017							
Envelope Number								
Date Range	Filing Status Submitted	Filing Code Acknowledgement	Filing Type Efile	Filing Description			Client Ref #	
<ul> <li>Anytime</li> <li>Last Month</li> </ul>		·····						1 Rest#1
RESET FILTER	Previous 1 Next							Ø Help

Figure 15.2 – Bulk History Page

### **Bulk Drafts**

The *Bulk Drafts* page includes the drafts of your and your firm's bulk filings.

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

≡• 🐝 EFILE QA 01 Bulk Draft	ts			<b>0</b> -	<b>.</b>	<b></b> -	A
Bulk Drafts Filter	FILING HISTORY FILING DRAFTS	BULK HISTORY BULK DRAFTS					Filters Applied 1 Result(s) Page 1 of 1
Created By	Bulk # 136 - Wedne	esday Test					
O My Filings My Firm	Bulk # 136 Started 04/14/2021 5:21 PM by Lau						
Bulk Number / Name	Draft # 817						
Bulk Number	Draft # 817 Started 04/14/2021 5:21 PM b Location	y Lauren Groswald					
Bulk Name	OFS QA 2017						
Location	Filing Code	Filing Type	Filing Description		c	lient Ref #	
Any Location •	Acknowledgement	Efile					
Case / Draft Number	Draft # 818						
Case Number	Draft # 818 Started 04/14/2021 5:24 PM b	y Lauren Groswald					
Draft Number	OFS QA 2017						
Date Range	Filing Code	Filing Type	Filing Description		c	lient Ref #	
Anytime	Acknowledgement	Efile					
Last Month     Last Week	Previous 1 Next						1 Result(s) Page 1 of 1
O Last Two Days	_						
() Today							
O Pick a Custom Range							
From Date 🗎							
To Date 📋							
			2				
RESET FILTER							O Help

Figure 15.3 – 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

START FILING

The Start Filing page is displayed.

= 🎪 EFILE QA 01 Start Filing	<b>?</b> -	⊕-	<b></b> -	2 martin gant on -
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Location # Select •				
Location is Required.				
← DASHBOARD				
4				
				Q Help

Figure 15.4 – Start Filing Page

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

The New Case and Existing Case panes are displayed.

Note: If bulk filing is not supported at the location you selected, the buttons to create multiple cases are not available.

= 🎪 FFILE QA 01 Start Filing	<b>0</b> - ⊕- <b>Ⅲ- </b> ≰
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Locator * OFS MockCMS	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
Firm - You can initiate buik filing.	Firm - You can bulk file into multiple cases.
BULK FILING IS NOT AVAILABLE AT THIS LOCATION.	BULK FILING IS NOT AVAILABLE AT THIS LOCATION.
← DASHBOARD	
l₃	
	() Help
© 2021 Tyler Technologies, Inc.   All i	Rights Reserved   Version: 0.0.0.1676

Figure 15.5 – Start Filing Page—Bulk Filing Not Supported

ß
Existing Case
Do you have a case number and are ready to file into it?
FILE INTO EXISTING CASE
Firm - You can bulk file into multiple cases.
FILE INTO MULTIPLE EXISTING CASES

Figure 15.6 – Start Filing Page—Bulk Filing Supported

START MULTIPLE NEW CASES

3. Click

The *Bulk Filing* window is displayed.

Bulk Name	
CANCEL	CONTINUE

Figure 15.7 – Bulk Filing Window



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

The Bulk Filing Dashboard page is displayed.

=- ★ EFILE QA 01 Bulk Filing Dashboard				<b>0</b> - ⊕- Ⅲ-	
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below.	Bulk # 157 - Sports	Cases			2 draft(s).
If you wish to edit or add details to a specific draft, you may do so.	Draft # 992				► <b>Ì</b> :
Quick Actions	OFS QA 2017	Case Category Civil		Case Type Negligence	
BULK ADD FILINGS	Filing Code	Filing Type	Filing Description	Client Ref #	
	Acknowledgement	eFile Only			
ADD DRAFT	Acknowledgement	eFile Only			
	Draft # 993				
	DFS QA 2017	Case Category Civil		Case Type Malpractice	
	Filing Code	Filing Type	Filing Description	Client Ref #	
	Acknowledgement	eFile and Serve			
	Acknowledgement	eFile Only			
					2 draft(s).
SAVE DRAFT AND EXIT					FEES >

Figure 15.8 – Sample Bulk Filing Dashboard

Note: If you have not completed the required fields for a filing, the following error message is displayed in the Draft pane: "Filing needs attention." If this message is displayed, you must resume your draft filing and complete the required fields.



Note: If there is a limit of drafts configured, then the number is displayed in the Add Draft button. The number reflects which draft filing you are about to add.

The Upload Documents page is displayed.

### Uploading Documents for a Bulk Filing

You can upload your documents for a bulk filing.

#### To upload your documents:

1. Click to look for the documents that you want to upload on the *Upload Documents* page.

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

Note: While you are entering a case to number.	filing, click to view the	cas	e nu	mbe	r or draft
=- 🗱 EFILE QA 01 Upload Documents - Bulk # 93 - Monday Bulk for Plano - Draft # 591	0-	<b>?</b> -	<b>.</b>	•	
Documents Case Parties Filings Service					
	Drag files here or     BROWSE				
L Maximum Filesize: 50.00 MB Supported File Types: TIFF Files (TIFF TIF) WordPerfect File (WPD) Word 2007 File (DOCX) Word 97/XP File (DOC) Porta	able Document File (PDF) XML Document (XML) Windows Media File (WMV) MPEG (MPEG) .				



SAVE AND EXIT

2. Select each document to be uploaded.

CASE INFORMATION →

3. Click to continue with your filing.

The Case Information page is displayed.

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

### Entering Case Information for a Bulk Filing

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

CASE INFORMATION

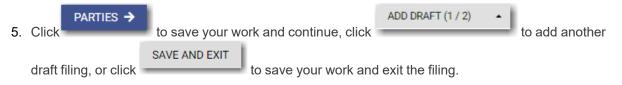
■ ★ EFILE QA 01 Case Information - Bulk # 93 - Monday Bulk for Plano - Draft # 591 0 .	<b>⊖</b> - ⊕- <u>Ⅲ</u> - <u>▲</u>
Documents Case Parties Filings Service	
Lositor * OFS QA 2017 +	Case Category * Civil *
Case Type # Negligence •	]
Procedures / Remades SELECT	Damage Ansurt Select €
UPLOAD DOCUMENTS SAVE AND EXIT	ADD DRAFT (1 / 2)



#### Note: At any time while the Case Information page is displayed, you can click

Content of the case information page, select the location from the Location drop-down list.
 Content 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.



### Entering Party Details for a Bulk Filing

Each bulk filing requires a party type.

	Parties - Bulk # 93 - Monday Bulk for	Plano - Draft # 591 🕕 🔹		<b>፼</b> - ⊕- Ⅲ-	1 mart 1 mart 1 m -
Documents Case	Parties Filings Ser	vice			
Party Type	Required Party	Party Name	Lead Attorney		Actions
Defendant	This is a required Party				<b>A</b>
Personal 🛕 🛛 A	ddress Additional Identifier	s			Hide Details
Party Type Defendant					
Personal Information					
Person     Entity     First Name		Middle Name	Last Name *	Suffix Select	•
First Name is Required.			Last Name is Required.		
Party CMS ID		Select			
Attorney Information					
ADD/EDIT ATTORNEYS	11				GO TO ADDRESS
Plaintiff	This is a required Party				▲ 🖉
					ADD PARTY
← CASE INFORMATION S.	AVE AND EXIT			AD	D DRAFT (1 / 2) ► FILINGS →

Figure 15.11 – Example of a Parties Page in a Bulk Filing

#### Note: While you are entering a case filing, click

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

- 1. On the Personal tab, select Person or Entity.
- 2. 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.

Ð

to view the case number or draft number.

- 3. Type the party case management system ID in the Party CMS ID field, if appropriate.
- 4. Select a language from the Interpreter drop-down list, if appropriate.

ADD/EDIT ATTORNEYS

to select the filing attorney.

The Attorneys window is displayed.

182

5. Click

Attorneys	Lead Attorney		
First Name	Last Name	Bar Number	FILTER
			RESET
Add	Name	Bar Number	
	Abby Carmichael	123	
	Perry Mason	123	
	Jack Stone	123	
Previous	1 Next		3 Result(s) Page 1 of 1
		CANCE	LEAD ATTORNEY

Figure 15.12 – Attorneys Window

- 6. Select the lead attorney for the first party on the case.
- 7. Select the additional attorneys for the case, and then click

nlaved	showing the attorneys that you selected	The lead atto

LEAD ATTORNEY

The *Lead Attorney* window is displayed, showing the attorneys that you selected. The lead attorney is indicated.

Attorneys	Lead Attorney	
Remove	Name	Lead Attorney
$\checkmark$	Abby Carmichael	0
$\checkmark$	Perry Mason	•
ATTORNEYS	3	CANCEL SAVE





The *Parties* page is displayed, listing the attorneys that you selected.



to enter the address information for the first party.

Party Type	Required Party	Party Name	Lead Attorney	Actions
Defendant	This is a required Party	Eleanor Defendant	Perry Mason	do the second se
Plaintiff	This is a required Party	Thomas Plaintiff	Sam Smith	ø
Personal Addre	s Additional Identifiers			Hids Details
Country United States Address Line 1		÷	Address Line 2	
City		State	Zip Code	
		Phone Number 🚯		GO TO ADDITIONAL IDENTIFIERS

Figure 15.14 – Address Tab on the Parties Page

10. Enter the country, address, city, state, ZIP code, and phone number for the first party.

11. Click	GO TO ADDITIONAL ID		dd more information for the specified party.	
Party Type	Required Party	Party Name	Lead Attorney	Actions
Defendant	This is a required Party	Eleanor Defendant	Perry Mason	ø
Plaintiff	This is a required Party	Thomas Plaintiff	Sam Smith	/
Personal	Address Additional Identifiers			Hide Details
Date of Birth MM/DD/YYYY	<b></b>			
Figure 1	5.15 – Additional Ide	ntifiers Tab on	the Parties Page	
calen 13. Click	to enter inform	nation for the oth	er required party.	:
14.Comp	lete all of the required	d fields for the se	econd party.	
	have another party to s have been added to		e, click ADD PARTY. Continue to add parties until a	III of the
16. Click work a	ADD DRAFT (1 / 2)	to add anoth	FILINGS → to save y	′our

### Entering Filing Details for a Bulk Filing

The Filings section allows you to enter the filing details.

≡• 🤸 EFILE QA 01 FIII	ings - Bulk # 93 - Monday Bulk for Plano - Draft # 591 🕕	)+			<b>9</b> -	<b>.</b> -	<b></b> -	
Documents Case	Parties Filings Service							
Filing Code	Client Ref #	Filing	Description					Actions
								<b>A</b> 🗷 🗊
Details 🛕 Optio	nal Services Communication							Hide Details
Test Content filing details Firm.	For more information visit: www.google.com							
Filing Type *		•	Filing Code *					\$
of the only			Filing Code is Required.					•
Filing Description				Client Reference Number				
Comments to Court  add comment here								
add comment nere								
								//
								GO TO OPTIONAL SERVICES
Filing on behalf of								
ASSOCIATED PARTIES								
Upload Docum	rents*							
Select a filing code before uploa								
								ADD FILING (1 O
← PARTIES SAVE AND EXIT							ADD D	RAFT (1 / 2) • Ø Hei

Figure 15.16 – Sample Filings Page

#### Note: While you are entering a case filing, click

٩٠

to view the case number or draft number.

#### To enter the filing details:

- 1. Select the filing type from the Filing Type drop-down list.
- 2. Select the filing code from the Filing Code drop-down list.
- 3. Type a description in the Filing Description field.
- 4. Type a client reference number in the **Client Reference Number** field.
- 5. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.

GO TO OPTIONAL SERVICES

6. if you need to apply any optional services for the filing, click

#### The **Optional Services** tab is displayed.

ot Selected		Selected
ro Fee Service	\$1	→
lit Fee Service	\$10	→
rtified Copies	?? × \$5	$\rightarrow$
r Page Fee Service	22 x	$\rightarrow$
ce Per Party	\$10	→
ority Processing	22 × \$4	→
ceholder Service 1		→
iceholder Service 2 with a long description to trigger rizontal scrolling		→
aceholder Service 3		→
ceholder Service 4		→
GA Decline Error	\$280	$\rightarrow$
oken Fee	\$10	→
r Page Fee No Multiplier		$\rightarrow$
GA Decline Error oken Fee		→

Figure 15.17 – Sample Optional Services Tab

7. To select the applicable optional services, click

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

⇒

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

GO TO COMMUNICATION

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

9. Click

to associate parties with the filing.

Associate Part	ties to this Filing				
First Name	Last Name	Entity	Select	➡ FILTER RESET	
Select	Party Name			Party Type	
	Phil Defendant			Defendant	
	Susan Plaintiff			Plaintiff	
Previous 1 Nex	xt				2 Result(s) Page 1 of 1
					CANCEL SAVE

The Associate Parties to this Filing window is displayed.



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

- 11. Select the relationship of the party from the **Party Type** drop-down list.
- 12. Select the check box for the party to which the associated party should be connected.



14. In the Upload Documents pane, click

ADD DOCUMENTS

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

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

Upload Docume	nts*			
Component	Name	Actions	Description	Security
Lead Document		ADD DOCUMENTS	This document is required.	
Attachments		ADD DOCUMENTS		

Figure 15.19 – Upload Documents Pane

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ <b>ī</b>			
	Drag files here or	BROWSE		
Maximum Filesize: <b>50.00 MB</b>				
Supported File Types: <b>TIFF Files (</b> 1	FIFF TIF) WordPerfect File (WPD ent (XML) Windows Media File (	,	,	e (DOC) Portable

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

Figure 15.20 – Select document(s) for Lead Document Window

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

15. Click to select the lead document if a document has already been uploaded. Click	BROWSE
to look for a document to upload or to locate additional lead documents.	
Note: If you want to delete a document that you previously uploaded, click	

16. After you have added all of your lead documents	s, click SAVE
	ADD DOCUMENTS
17. If you have attachments to add to the filing, click	in the <b>Attachments</b> section.
18. If you want to add security to any of the docume	nts, select an option from the <b>Security</b> drop-down list
19. Click save your work and con	ADD DRAFT (1 / 2)  to add another
draft filing, or click	our work and exit the filing.

## Entering Payment Information for a Bulk Filing

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

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

			Ø- +	· III-	±
Bulk # 157 - Sports Cases					
After filling in the required fields, click on "CALCULATE FEES" at the bottom of the page. To	aw the fee details on individual drafts, click on "FEE DETAILS".				
Apply Toment Account to All Orafts Select  P	Apply Filing Attorney to All Drafts Select	ŧ	APPLY TO	) ALL	
*Payment accounts may be restricted at some locations Draft # 992 Location Case	Langory	Сазе Туре			
OFS QA 2017 Ch Payment Account # Lauren's Walver	Party Responsible for Fees  Select.,	Negligence	SEARCH		
Fing Atomy () * Select	Filer Type		_	•	
Filing Attorney is Required.					
Draft # 993	lategory	Case Type Malpractice			
Payment Account <b>*</b> Lauren's Walver	Party Responsible for Fees     Select	٥	SEARCH		
Filing Attorney (0 * Select	Filer Type     Select			÷	
Filing Attorney is Required.					Q Help
← BULK DASHBOARD SAVE DRAFT AND EXIT	© 2021 Tyler Technologies, Inc.   All Rights Reserved   Version: 0.0.0.	804	<u>.</u>		CALCULATE FEES

Figure 15.21 – Sample Bulk Fees/Summary Page—Blank

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

To enter the payment information for your bulk filing:

Note: If you do not want to apply the same payment account and filing attorney to all of the draft

filings in the bulk, you must select the payment account and the filing attorney for each individual draft 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 draft filings in the bulk.

2. Select the filing attorney from the Apply Filing Attorney to All Drafts drop-down list. Then, click

```
APPLY TO ALL*
```

to apply the selected filing attorney to all of the draft filings in the bulk.

Note: All fields provided in the examples and steps listed here may not be displayed for all users.

3. For each draft filing, select the party responsible for fees from the Party Responsible for Fees drop-

down list. Click

if you want to search for a party.

Select Party Res	ponsible For Fees	3			
First Name	Last Name	Entity	Party Type Select	¢FILTE	RESET
Select	Party Name			Party Type	
0	Mary Jones			Plaintiff	
•	John Smith			Defendant	
Previous 1 Next					2 Result(s) Page 1 of 1
					CANCEL SAVE

Figure 15.22 – Select Party Responsible For Fees Window

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

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

=- 🐝 EFILE QA 01 Bulk Fees / Summary				(	9-	<b>.</b> -	<b></b> -	A 1999 1 1999 1 1999 - 1999 -
Bulk # 157 - Sports Cases								
After filling in the required fields, click on "CALCULATE FEES" at the b	pottom of the page. To view the fee deta	ails or	ndividual drafts, click on "FEE DETAILS".					
Apply Payment Account to All Drafts Lauren's Walver	APPLY TO ALL*		Apply Filing Attorney to All Drafts Perry Mason	•	AP	PLY TO ALI		
* Payment accounts may be restricted at some locations								
Draft # 992	Case Category		Case Type					
OFS QA 2017	Civil		Negligence					
Payment Account # Lauren's Waiver	\$		ty Responsible for Fees Joseph Defendant	÷	SEAI	RCH		
Filing Attorney 🚯 🛪		F	r Type					
Perry Mason	٥		Default			÷		
Draft # 993								
Location OFS QA 2017	Case Category Civil		Case Type Malpractice					
Payment Account *		E	ty Responsible for Fees					
Lauren's Waiver	\$		George Doctor MD	÷	SEA	RCH		
Filing Attorney 🚯 \star		F	r Type				_	
Perry Mason	\$	] [	Default			÷	]	
+ BULK DASHBOARD SAVE DRAFT AND EXIT								CALCULATE FEES SUMMARY →

Figure 15.23 – Sample Bulk Fees/Summary Page—Completed Fields

5. When all fields on the page have been completed, click



#### The Fee Details button is displayed.



6. Click

The *Fee Details* window is displayed.

ee Details	
1 Fraud	^
Case Initiation Fee	\$10.00
	Subtotal \$10.00
Service Fees	^
Total Service Fees	\$1.00
Convenience Fee Total Court Service Fees	\$1.00 \$1.00
	Subtotal \$3.00
	Grand Total \$13.
	CLOSE

Figure 15.24 – Sample Fee Details Window

7. Review the filing fees, and then click

SUMMARY 🗲

### Viewing the Envelope Summary for a Bulk Filing

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 for a bulk filing:

- 1. Complete the required information on the *Case Information*, *Parties*, *Filings*, and *Bulk Fees / Summary* pages.
- 2. After you have completed the fields on each page, from the Bulk Fees / Summary page, click

SUMMARY 🗲

The Bulk Fees / Summary page is displayed.

SUBMIT

		<b>?</b> - ⊕-		-
r E-Filing				
Case Category	Case Type			
Civil	Negligence			
Case Cotegory Civil	Case Type Malpractice			
		Care Critigory Care Type	Care Celegory Care Type	Care Degory Care Type

Figure 15.25 – Sample Bulk Fees / Summary Page—Submission Agreements Not Accepted

- 3. If there are submission agreements for your 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 filing, click

EFILE QA 01 Bulk Fees / Summary			<b>0</b> - ⊕- Ⅲ-	L
Bulk # 157 - Sports Cases		В	Bulk submission is complete.	BULK HISTORY DASHBOARD
OFS QA 2017				
Draft # 992				0
Location OFS QA 2017	Case Category Civil	Case Type Negligence		
Draft # 993				•
Location OFS QA 2017	Case Category Civil	Case Type Malpractice		_
FEES SAVE DRAFT AND EXIT				SUBMIT

Figure 15.26 – Sample Bulk Fees / Summary Page After Filing is Submitted



### Associating Parties to a Bulk Filing

When you add a filing to a bulk draft, you can associate parties with the filings you are adding.

■-				<b>0</b> - ⊕- Ⅲ-	
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below.	Bulk # 157 - Sports	Cases			2 draft(s
If you wish to edit or add details to a specific draft, you may do so.	Draft # 992				i
Quick Actions	OFS QA 2017	Case Category Civil		Case Type Negligence	
Quick Actions BULK ADD FILINGS	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description	Client Ref #	
ADD DRAFT	Acknowledgement	eFile Only			
	Draft # 993				Image:
	OFS QA 2017	Case Category Civil		Case Type Malpractice	
	Filing Code	Filing Type	Filing Description	Client Ref #	
	Acknowledgement	eFile and Serve			
	Acknowledgement	eFile Only			2 draft
					2 draft(
SAVE DRAFT AND EXIT					FEES ->

Figure 15.27 – Sample Bulk Filing Dashboard Page

To associate parties to a bulk filing:

1. On the Bulk Filing Dashboard page in the Quick Actions pane, click

BULK ADD FILINGS

The Bulk Add Filings page is displayed.

=- 🌼 EFILE QA 01 Bulk Add Filings			<b>?</b> -	<b>.</b> -	<b></b> -	•
Drafts Add Filings Save Filings						
Select All						
Filter: Lootion Select	Case Category  Select	\$ Case Type Select				÷
						RESET FILTER
□ OFS QA 2017						
Draft # 992	Case Category Civil	Case Type Negligence				
Draft # 993	Case Category Civil	Case Type Malpractice				
← BULK DASHBOARD						ADD FILINGS ->

Figure 15.28 – Drafts Tab on the Bulk Add Filings Page

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 the bulk. If you want to add all of the filings, select the **Select All** check box.



#### The Add Filings tab is displayed.

ve Filings							
Client Ref #	Filir	ng Description					Actions
							🔺 🗾 🗊
vices Communication							Hide Det
re information visit: www.google.com							
		Filing Code \star					
	÷	Select					÷
		Filing Code is Required.					
			Client Reference Number				
							GO TO OPTIONAL SERVICES
te*							
cuments.							
							ADD FILING (1 C
							SAVE FILINGS
	vices Communication re information visit: www.google.com	vices Communication re information visit: www.google.com •	vices Communication re Information visit: www.google.com re Information visit: www.google.com re Information visit: www.google.com Filing Code is Required. Filing Code is Required.	vices Communication re Information visit: www.google.com  ring Code * Select Filing Code is Required.  Cleat Reference Number  Cleat Reference Number	vices Communication re Information visit: www.google.com	vices Communication re Information visit: www.google.com	vices Communication re Information visit: www.google.com

Figure 15.29 – Add Filings Tab on the Bulk Add Filings Page

- 5. On the Add Filings tab, select the filing type from the Filing Type drop-down list.
- 6. Select the filing code from the Filing Code drop-down list.



7. In the Upload Documents pane, click

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

Not Selected		Selected			
test.pdf	→				
Academic_Calendar	→				
	Drag files here a	PROWOF			
	Drag files here of	BROWSE			
Maximum Filesize: <b>50.00 MB</b>					
Supported File Types: <b>TIFF Files (</b> 1	TIFF TIF) WordPerfect File (WI	PD) Word 2007 File (DO	CX) Word 97/X	P File (DOC) Port	able

Figure 15.30 – Select document(s) for Lead Document Window

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

SAVE FILINGS 🗲

#### 9. Click

The Save Filings tab is displayed.

=- 🐝 EFILE QA 01 Bulk Add Filings			<b>?</b> - ⊕-	III • 🔺 MARINA ANALANA ANA
Drafts Add Filings Save Filings				
Filings				
Filing Code	Filing Type eFile Only	Filing Description	Client Ref #	
Draft # 992 Losson OFS QA 2017	Case Category Civil		Case Type Negligence	
Draft # 993 Location OFS QA 2017	Case Category Civil		Case Type Malpractice	
← ADD FILINGS				SAVE



10. On the Save Filings tab, click

SAVE

The Associate Parties button is displayed for each filing.

😑 - 🤹 EFILE QA 01 Bulk Add Filings					8-	<b>.</b>	<b></b> -	•
Drafts Add Filings Save Filings								
Filings								
Filing Code Acknowledgement	Filing Type eFile Only		Filing Description		Client Ref	2		
Draft # 992 Location OFS QA 2017 ASSOCIATE PARTIES		Case Category Civil		Case Type Negligence				O
Draft # 993 Location OFS QA 2017 ASSOCIATE PARTIES		Case Category Civil		Case Type Malpractice				ø
← ADD FILINGS								DONE



	ASSOCIATE PARTIES
11. Click	

The Select Filings window is displayed.

Select Filings				×
SELECT ALL				
Select	Filing Code	Client Ref #	Filing Description	
	Addendum			
	Acknowledgement			
	Acknowledgement			
	Acknowledgement			
				CANCEL SELECT

Figure 15.33 – Select Filings Window

12. Select the check boxes for the filing codes that you want to add, or click SELECT ALL . Then, click

The Associate Parties to selected Filing(s) window is displayed.

Associate P	arties to selec	ted Filing(s)			
First Name SELECT ALL	Last Name	Entity	Select	¢	FILTER RESET
Select	Party Name			Party Type	
	Jane Doe			Defendant	
	John Doe			Plaintiff	
Previous 1	Next				2 Result(s) Page 1 of 1
					CANCEL SAVE

Figure 15.34 – Associate Parties to Selected Filing(s) Window — Blank

13. If you want to filter the parties that you want to associate 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

Party Type
Attorney General
Select Ar 3rd Party Defendant 3rd Party Defendant 4th Party Defendant Ad Litem Administrator Adfiant Agent Appellee Appellee Applicant Assault Victims Attorney Attorney Ad Litem
Attorney General
Bank Bondsman Child Victims Of Physical Abuse City Civil Defendant

FILTER

Figure 15.35 – Party Type Drop-Down List

14. Select the check box for the filing that you want to associate with the added party, or click



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 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 multiple existing cases:

START FILING

1. On the *Dashboard* page, click

The Start Filing page is displayed.

E 🌾 EFILE QA 01 Start Filing	<b>?</b> -	<b></b> -	<b></b> -	1
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loaton * Select •				
Location is Required.				
← DASHBOARD				
₿ 				
				D Help

Figure 15.36 – Start Filing Page

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

The New Case and Existing Case panes are displayed.

Note: If bulk filing is not supported at the location you selected, the buttons to create multiple cases are not available.

= 🍫 FFILE QA 01 Start Filing	<b>0</b> - ⊕- <b>Ⅲ- </b> ▲				
Select Filing Location					
Select your filing location to see which types of filings are allowed at that location.					
Looston * OFS MockCMS					
New Case	Existing Case				
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?				
START A NEW CASE	FILE INTO EXISTING CASE				
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.				
BULK FILING IS NOT AVAILABLE AT THIS LOCATION.	BULK FILING IS NOT AVAILABLE AT THIS LOCATION.				
← DASHBOARD					
lş.					
	О нер				
© 2021 Tyler Technologies, Inc.   All	Rights Reserved   Version: 0.0.0.1676				

Figure 15.37 – Start Filing Page—Bulk Filing Not Supported

= 🎪 EFILE QA 01 Start Filing	<b>⊙</b> - ⊕- <u>₩</u> - <b>±</b>	
Select Filing Location Please select your location below. Location # OFS QA 2017 *		
New Case	Existing Case	
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?	
START A NEW CASE	FILE INTO EXISTING CASE	
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.	
START MULTIPLE NEW CASES     FILE INTO MULTIPLE EXISTING CASES		

Figure 15.38 – Start Filing Page—Bulk Filing Supported

3. Click

#### FILE INTO MULTIPLE EXISTING CASES

The Bulk Filing window is displayed.

Bulk Filing		×
Bulk Name		
	CANCEL	CONTINUE

Figure 15.39 – Bulk Filing Window

4. Type the name of the bulk filing that you want to file into, and then click

The Bulk Filing Dashboard page is displayed.

=- 🐝 EFILE QA 01 Bulk Filing Dashboard	<b>0</b> - ⊕- <b>Ⅲ</b> - <b>⊥</b>
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you may do so.	Bulk # 158 - Texas
Quick Actions BULK ADD FILINGS Find Cases CASE SEARCH	
BOOKMARKS SEARCH FILING HISTORY SEARCH SAVE DRAFT AND EXIT	FEES 🗲

CONTINUE



- 5. In the Quick Actions pane, select the method by which you want to search for the cases that you want to add to your bulk—Case Search, Bookmarks Search, or Filing History Search.
- 6. Click the button for the method you selected, and then follow the prompts for that method.

### Filing into Multiple Existing Cases Using the Bookmark 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 using the Bookmark search:

1. On the Dashboard page, click

START FILING

The Start Filing page is displayed.

E 🌾 EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	<b></b> -	2 mmm.smr.gamt.com -
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loaton * Select				
Location is Required.				
← DASHBOARD				
2				
				Ø Help

Figure 15.41 – Start Filing Page

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

The New Case and Existing Case panes are displayed.

EFILE QA 01 Start Filing	<b>0</b> • ⊕• <b>Ⅲ</b> • <b>≜</b>
Select Filing Location Please select your location below.	
Locator * OFS QA 2017 +	2
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.
START MULTIPLE NEW CASES	FILE INTO MULTIPLE EXISTING CASES
←DASHBOARD	

Figure 15.42 – Start Filing Page—Bulk Filing Supported

	FILE INTO MULTIPLE EXISTING CASES	1
3. Click		

The Bulk Filing window is displayed.

Bulk Name	Bulk Filing		×
	Bulk Name		
CANCEL CONTINUE		CANCEL	CONTINUE

Figure 15.43 – Bulk Filing Window

4. Type the name of the bulk filing that you want to file into, and then click

The Bulk Filing Dashboard page is displayed.

=- ★ EFILE QA 01 Bulk Filing Dashboard	<b>0</b> - ⊕- <b>Ⅲ</b> - <b>≜</b>
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you may do so.	Bulk # 158 - Texas
Quick Actions BULK ADD FILINGS Find Cases CASE SEARCH BOOKMARKS SEARCH FILING HISTORY SEARCH	
SAVE DRAFT AND EXIT	FEES →

CONTINUE

Figure 15.44 – Sample Bulk Filing Dashboard Page

5. In the Quick Actions pane, click

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

BOOKMARKS SEARCH

Bookmarks Add to B	ulk			
Select	Case Number	Description		FILTER RESET
Case #CC-20-360	0 Tim Thompsonv.Laura and Associates	S		
Case #CC-21-006	a av.Ben Benson			
Case #CC-21-116 Location OFS QA 2017	Andrea Thompsonv.ABC Consultants			
Case #CC-21-117 Location OFS QA 2017	Naomi Watson v. Helena Carter			
Case #CV-2020-1 Jane Doe vs John	2785940 Smith vs Jane2 Doe2 vs Jane3 Doe3 vs J	lane4 Doe4 vs Jane5 Doe5 vs Ja	ne6 Doe6 vs Jane7 Doe7 vs Jane	e8 Doe vs Jane9 Doe vs Jane10 Doe vs
Previous 1 Next				5 Result(s) Page 1 of 1
				CANCEL PROCEED

Figure 15.45 – Sample Bookmarks Window

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

PROCEED .

Note: If your bulk filing is not displayed in the *Bookmarks* window, you can search for the bulk filing that you want. Select the location from the Location drop-down list, and then type the case

number in the Case Number field. Then, click

#### The Add to Bulk window is displayed.

Bookmarks Add to Bulk	
Case #CC-21-116 Andrea Thompsonv.ABC Consultants Location OFS QA 2017	
	CANCEL ADD TO BULK





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

To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below.	Bulk # 175 - Sports	Cases				2 draft(
If you wish to edit or add details to a specific draft, you may do so.	Case # CC-21-11	85	Case Category Civil		Case Type Malpractice	
Quick Actions	Filing Code	Filing Type		Filing Description	Clie	nt Ref #
BULK ADD FILINGS	Acknowledgement	eFile Only				
Find Cases		~ .				
CASE SEARCH	Case # CC-21-11	84				
BOOKMARKS SEARCH	OFS QA 2017		Case Category Civil		Case Type Negligence	
FILING HISTORY SEARCH	Filing Code	Filing Type		Filing Description	Clie	nt Ref #
	Acknowledgement	eFile Only				
						2 draft

Figure 15.47 – Sample Bulk Filing Dashboard Page—Case Added to Bulk

## Filing into Multiple Existing Cases Using Case Search

You can file into a bulk filing that already contains multiple existing cases from the Case Search page.

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

START FILING

To file into multiple existing cases using Case Search:

1. On the *Dashboard* page, click

The *Start Filing* page is displayed.

= 🎪 EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b> -	<b></b> -	<b>≜</b>
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Lozator * Select ÷				
Location is Required.				
←DASHBOARD				
2				
				O Help

Figure 15.48 – Start Filing Page

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

The New Case and Existing Case panes are displayed.

EFLE OA 01 Start Filing Select Filing Location Please select your location below. Locator * OFS QA 2017	<b>0</b> • ⊕• <b>Ⅲ• 1</b>
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.
START MULTIPLE NEW CASES	FILE INTO MULTIPLE EXISTING CASES
← DASHBOARD	



	FILE INTO MULTIPLE EXISTING CASES	
3. Click		

The Bulk Filing window is displayed.

Bulk Name	Bulk Filing		×
	Bulk Name		
CANCEL CONTINUE		CANCEL	CONTINUE

Figure 15.50 – Bulk Filing Window

4. Type the name of the bulk filing that you want to file into, and then click

The Bulk Filing Dashboard page is displayed.

=- 🐝 EFILE QA 01 Bulk Filing Dashboard	<b>0</b> - ⊕- <b>Ⅲ- ⊥</b>
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you may do so.	Bulk # 158 - Texas
Quick Actions BULK ADD FILINGS Find Cases CASE SEARCH	
BOOKMARKS SEARCH FILING HISTORY SEARCH SAVE DRAFT AND EXIT	rees →

CASE SEARCH

CONTINUE

Figure 15.51 – Sample Bulk Filing Dashboard Page

5. In the Quick Actions pane, click

The Case Search window is displayed.

SEARCH

Search for Cases Case Search Results Add to Bulk	
Location 🗚	
OFS QA 2017 \$	
Search for a Case by Case Number O Party Name	Q
If you are not sure your case number is correct, refer to the formatting instructions for the selected court.	
Case Number 🛊	
Case Number is Required.	
	CANCEL SEARCH
	CANCEL SEARCH

Figure 15.52 – Case Search Window

- 6. Select the location from the Location drop-down list.
- 7. Type the number for the case you want to locate, and then click

The Case Search Results window is displayed.

Search for Cases Ca	se Search Results Add to Bulk		
Location: OFS QA 2017 Cas	e Number: CC-21-117		
Case #CC-21-117 Naomi Watson v. Hele	na Carter		
Location OFS QA 2017	Case Category Civil	Case Type Appeal	
REFINE SEARCH			CANCEL PROCEED

Figure 15.53 – Case Search Results Window

8. If the case is the one you want to add to the bulk, select the check box, and then click

The Add to Bulk window is displayed.

Search for Cases Case Search Results	Add to Bulk		
Case #CC-21-117 Naomi Watson v. Helena Carter			
Location OFS QA 2017	Case Category Civil	Case Type Appeal	
SEARCH RESULTS			CANCEL ADD TO BULK



Note: If the case that results from the search is not correct, click . Then search for your case again.

PROCEED

Note: If you do not click any cases in the Case Search Results window, you cannot proceed.

Search for Cases Case Search Results Add to Bulk	
In order to add cases to your bulk filing, one or more cases must be selected.	
SEARCH RESULTS	CANCEL ADD TO BULK

Figure 15.55 – Case Search Message—No Cases Selected

9. If the case that results from your search is correct and you selected the check box for that case, click

ADD TO BULK		DONE	1
	. and then click	_	

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

=- 🐝 EFILE QA 01 Bulk Filing Dashboard					?-	••	<b></b> -	2 mmm
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below.	Bulk # 175 - Spo	rts Cases						2 draft(s).
If you wish to edit or add details to a specific draft, you may do so.	Case # CC-21-1	1185	Case Category Civil			Case Type Malprac	lice	
Quick Actions	Filing Code	Filing Type		Filing Description			Client Re	
BULK ADD FILINGS	Acknowledgement	eFile Only						
Find Cases	Case # CC-21-1	1184						▶ 🗊 🗄
BOOKMARKS SEARCH	Location OFS QA 2017		Case Category Civil			Case Type Negliger	ice	
FILING HISTORY SEARCH	Filing Code	Filing Type		Filing Description			Client Re	
	Acknowledgement	eFile Only						
								2 draft(s).
SAVE DRAFT AND EXIT								FEES >

Figure 15.56 – Sample Bulk Filing Dashboard Page—Case Added to Bulk

### Filing into Multiple Existing Cases Using Filing History Search

You can file into a bulk filing using 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 using Filing History search:

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

The *Start Filing* page is displayed.

<b>?</b> -	<b>.</b>	<b></b> -	A
			() Help

Figure 15.57 – Start Filing Page

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

The New Case and Existing Case panes are displayed.

EFILE QA 01 Start Filing	<b>⊘</b> ∽ ⊕∽ <b>Ⅲ</b> ∽ <b>≜</b>
Select Filing Location Please select your location below.	6
OFS QA 2017 + New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.
START MULTIPLE NEW CASES	FILE INTO MULTIPLE EXISTING CASES
← DASHBOARD	

Figure 15.58 – Start Filing Page—Bulk Filing Supported

	FILE INTO MULTIPLE EXISTING CASES	1
3. Click		

The Bulk Filing window is displayed.

Bulk Name	Bulk Filing		×
	Bulk Name		
CANCEL CONTINUE		CANCEL	CONTINUE

Figure 15.59 – Bulk Filing Window

4. Type the name of the bulk filing that you want to file into, and then click

The Bulk Filing Dashboard page is displayed.

=- 🌼 EFILE QA 01 Bulk Filing Dashboard	<b>0</b> - ⊕- <b>Ⅲ</b> - <b>≜</b>
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you may do so.	Bulk # 158 - Texas
Quick Actions BULK ADD FILINGS Find Cases	
CASE SEARCH BOOKMARKS SEARCH FELING HISTORY SEARCH	
SAVE DRAFT AND EXIT	FEES.≯

FILING HISTORY SEARCH

CONTINUE



5. In the Quick Actions pane, click

Actions parte, click

The Filing History window is displayed.

ed By	Location	Case Number	
y Filings	\$ Select	•	
lange	From Date	To Date	
nytime	terr bate		
		FILTE	ER RESE
Case #CR-21-009876			
Location	Case Category	Case Type	
OFS QA 2017	Criminal	Adult Misdemeanor	
Case #CC-21-117 Naomi Watson	v. Helena Carter Case Category	Case Type	
OFS QA 2017	Civil	Appeal	
Case #CC-21-322 a av.b b Location OFS QA 2017	Case Category Civil	Case Type Breach Of Contract	
Case #CC-21-084	Case Category	Case Type	
OFS QA 2018	Family	Divorce W/ Parent Child Relationship	
	·	· · · · · · · · · · · · · · · · · · ·	
Case #CC-20-2703 ABCD Associa			
Location OFS QA 2017	Case Category Civil	Case Type Breach Of Contract	
0F3 QA 2017	Civii	Breach Of Contract	
evious 1 2 3 4 5 6 7 8 9	10 11 12 13 Next	63 Re	sult(s) Page 1

Figure 15.61 – Sample Filing History Window

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

The Add to Bulk window is displayed.

Filing History Add to Bulk			
Case #CC-21-117 Naomi Watson v. Helena Carter			
Location OFS QA 2017	Case Category Civil	Case Type Appeal	
BACK			CANCEL ADD TO BULK

PROCEED

Note: If your bulk filing is not displayed in the *Filing History* window, you can search for the bulk filing that you want. First, select the filings that you want to display (your filings or the firm's filings) from the Created By drop-down list. Then, select the location from the Location drop-down list. Next, type the case number in the Case Number field, and then select the date range

for the filings you want to display. Then, click

F	ILI	EK	

Figure 15.62 – Add to Bulk Window



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

To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below.	Bulk # 175 - Sports	Cases					2 drafti
uerow. If you wish to edit or add details to a specific draft, you may do so.	Case # CC-21-118	5	Case Category		Case Type Malpractice		
Quick Actions	Filing Code	Filing Type		Filing Description		Client Ref #	
BULK ADD FILINGS	Acknowledgement	eFile Only		ring secondor		GRAN PARTY	
Find Cases							
CASE SEARCH	Case # CC-21-118	4					
BOOKMARKS SEARCH	OFS QA 2017		Case Category Civil		Case Type Negligence		
FILING HISTORY SEARCH	Filing Code	Filing Type		Filing Description		Client Ref #	
	Acknowledgement	eFile Only					
							2 draft

Figure 15.63 – Sample Bulk Filing Dashboard Page—Case Added to Bulk

## Copying a Bulk Filing

You can copy a bulk draft filing if one or more envelopes in the bulk filing failed to submit. To copy a bulk filing:

- 1. Navigate to the Bulk History page or the Bulk Drafts page.
- 2. Locate the bulk filing that you want to copy.

	Wednesday Test 5:21 PM by Lauren Groswald				
Draft # 817 Started 04/14, Location OFS QA 2017	7 /2021 5:21 PM on behalf of Jack Stone by Lau	ren Groswald			
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Draft	Acknowledgement	Efile			
Draft	Abstract Of Judgment	Efile			
Draft # 818	8				
Draft # 818 Started 04/14, Location OFS QA 2017	/2021 5:24 PM on behalf of Jack Stone by Lau	ren Groswald			
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Draft	Acknowledgement	Efile			

Figure 15.64 – Sample Bulk Filing Pane



The filing that you copied is displayed on the Bulk Filing Dashboard page.

=- 🐝 EFILE QA 01 Bulk Filing Dashboard				<b>0</b> - ⊕- Ⅲ-	-
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you	Bulk # 157 - Sports	Cases			2 draft(s).
n you wan to earl of add details to a specific drait, you may do so.	Draft # 992	Case Category		Case Type Negligence	
Quick Actions BULK ADD FILINGS	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description	Client Ref #	
ADD DRAFT	Acknowledgement	eFile Only			
	Draft # 993	Case Category		Case Type Malpractice	
	Filing Code Acknowledgement	Filing Type eFile and Serve	Filing Description	Client Ref #	
	Acknowledgement	eFile Only			2 draft(s).
SAVE DRAFT AND EXIT					FEES >

Figure 15.65 – Sample Bulk Filing Dashboard

4. Continue with your filing.

## **16** Reports

#### Topics covered in this chapter

#### Creating a Report

You can generate a report that can be used to reconcile financial transactions for envelopes and filings that you or a member of your firm submitted. The report is available in a Microsoft Excel spreadsheet that you can download.

## **Creating a Report**

#### To run a report:

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

#### The *Reports* page is displayed.

EFILE QA 01 Reports			?-	••	<b></b> -	<b>2</b>	
orts							
Useful when reconciling financial transac	tions against envelopes submitted during a selectable time frame up to 6	0 days. * Provides envelope and filing level information specific to fees. * De	livered in an Excel spr	radsheet to a	low for filterin	g and searchin	ng.
eated By	Location						
My Filings	All SELECT						
) My Firm	All SELECT						
itus		Date From \star		Date To \star			
All Statuses			<b></b>				<b></b>
Accepted	Reviewed		-				1
Cancelled	✓ Served	Date From is Required.		Date To	is Required	t.	
Receipted	Submission Failed						
Returned	✓ Submitted						
						CANCEL	DOWNLOAD REPORT

Figure 16.1 – Reports Page

- 2. Select the appropriate option for the report, either My Filings or My Firm.
- 3. Select the statuses that you want to include in the report.



4. Click

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

The Select Locations dialog box is displayed.

Select Locations	×			
Filter				
Select All	^			
Select All  Select All  Subset All  Subse	¢			
Figure 16.2 – Select Locations	Dialog Box			
Figure 16.2 – Select Locations 5. Select the locations that you v	Dialog Box	e report, and the	DONE	
-	Dialog Box	e report, and the to select the dat	en click	endar.
5. Select the locations that you	Dialog Box want to include in th eport, or click	to select the dat	en click tes from the cale	
<ol> <li>Select the locations that you</li> <li>Type the date range for the re</li> <li>Note: The date range that you</li> </ol>	Dialog Box want to include in th eport, or click	to select the dat	en click tes from the cale	
<ol> <li>Select the locations that you was a select the locations that you was a select the date range for the rest of the select the selec</li></ol>	Dialog Box want to include in th eport, or click	to select the dat xceed 60 days.	en click tes from the cale	
<ol> <li>Select the locations that you way</li> <li>Type the date range for the resonance of the resonance of the second second</li></ol>	Dialog Box want to include in the eport, or click	to select the dat xceed 60 days.	en click tes from the cale	

ų,

Figure 16.3 – Error Message for Report Date Range

DOWNLOAD REPORT

7. Click

The report is downloaded in a Microsoft Excel file, which you can filter and sort as needed. The report includes one tab for filings and one tab for envelopes.

# 17 Support and Feedback

#### Topics covered in this chapter

- Requesting Support
- ♦ Zendesk Support
- Providing Feedback
- Tyler Technologies Technical Support Contact Information

You can request technical support for the application, or you can provide feedback for the application.

## **Requesting Support**

You can request support from Tyler regarding the application.

To request support regarding the application:



in the eFile header.

The Support / Feedback window is displayed.

Support	Feedback
I have a problem with the Application.	I have a Suggestion.
I have a technical problem with eFiling.	I have a Feature Request.
GET SUPPORT	GIVE FEEDBACK



GET SUPPORT

The Support window is displayed.

Note: Your screen may vary from the example provided.

Support	×
Self Service Support Contact Technical Support	
ß	BACK TO SUPPORT / FEEDBACK CLOSE

#### Figure 17.2 – 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.

		BACK TO SUPPORT / FEEDBACK		CLOSE	1
4.	Either click		, or click		

## Zendesk Support

A new Help icon has been added to every page in the application.

= 🐝 eFile Dashboard		<b>⊙</b> • ⊕• Ⅲ• <b>≜</b>
Start Filing	Filing History	Drafts
Click on START FILING to select your filing options. You could initiate a case or file into an existing case. Click here.	Case # CC-20-182           Envelope # 3277 Submitted at 10/21/2020 10:50 AM           Filings: Submitted (1)           Case # CC-20-182           Envelope # 3276 Submitted at 10/19/2020 5:39 PM           Filings: Submitted (1)           Case # CC-20-182           Envelope # 3275 Submitted at 10/19/2020 5:28 PM           Filings: Submitted (1)	Draft # 15081 Draft # 15081 Started at 11/23/2020 3:44 PM Draft # 15075 Draft # 15075 Started at 11/16/2020 1:32 PM Draft # 15055 Draft # 15055 Started at 11/09/2020 1:17 PM
START FILING	View Filing History	View My Drafts
Case Search Q	Bookmarks	Templates
Case # 'CC-20-182' OFS QA 2018	CC-19-2373 - Drina Colin v. McDonald Associates LLC OFS QA 2017 - Court at Law	Small Claims template
Case # 'CC-20-201' OFS QA 2017	CC-15-1813 - ******** File and Serve	simple civil
Search Cases	View My Bookmarks	View My Templates
		D Help

Figure 17.3 – Help Icon on the Dashboard Page

You can click the Help icon to open a chat modal.

Odyssey File and Serve _ Cloud _
Odyssey File and Serve Cloud · Bot Hil Welcome to Odyssey File and Serve Cloud,
Ask me a question and I'll find the answer for you.
Get in touch
Type your question here

Figure 17.4 – Chat Modal

In the chat modal, click **Get in touch**. Options are displayed for the method by which you want to communicate with the Support representative.

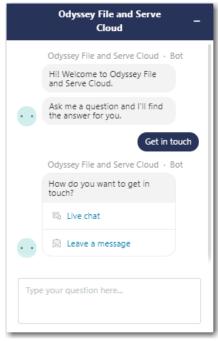


Figure 17.5 – Chat Modal with Communication Options

Click the option that you want to use, and then type your question in the chat window. A Support representative will assist you.

## **Providing Feedback**

You can provide feedback to Tyler regarding the application if you want. You can also request a new feature.

To provide feedback regarding the application or to request a new feature:



1. Click in the eFile header.

The Support / Feedback window is displayed.

Support / Feedback	×
Support	Feedback
I have a problem with the Application.	I have a Suggestion.
I have a technical problem with eFiling.	I have a Feature Request.
GET SUPPORT	GIVE FEEDBACK
	CLOSE

Figure 17.6 – Support / Feedback Window

GIVE FEEDBACK

The *Feedback* window is displayed.

Feedback		×
Feedback Type \star		
Feedback		\$
Feedback 🕊		
Feedback is Required.		
It is ok to contact me about this feedback		
	BACK TO SUPPORT / FEEDBACK	CLOSE

Figure 17.7 – Feedback Window

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

Feedback Type \star	
Feedback	÷
Select	
Feedback	
Suggestion Other	
Other	

Figure 17.8 – Feedback Type Drop-Down List

- 4. Type your feedback regarding the application or suggestion for a new feature in the **Feedback** comments window.
- 5. Select the "It is ok to contact me about this feedback" check box if you want Tyler to contact you for more information, or leave the check box cleared if you do not want to be contacted.



## 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.