

Individual Filer User Guide Odyssey[®] File & Serve[™] 2021.4

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Publishing History

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

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

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

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

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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 Tools → Options → Forms .
	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.

lcon	Note Type	Description
0	Note	Notes provide extra details about a topic or step.
\	Caution	Caution messages indicate that a specific action could cause an error in the system.
⚠	Warning	Warning messages indicate that a specific action could cause an interruption of service.
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[®] File & Serve[™] system enables registered users to file documents with the court anytime, anywhere, 24 hours a day, seven days a week. This highly automated, scalable system provides clients the opportunity to transition from an inefficient, paper-based process to a streamlined, technology-based electronic filing (e-filing) system.

Release 2021.4 Enhancements

The following enhancements were made to the Odyssey[®] File & Serve[™] system for Release 2021.4.

Feature/Update	Description/Location in Document
The bulk filing feature was added to this release.	Bulk Filing, page 165
	Adding a New Service Contact to a Filing, page 133

Before You Begin

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

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

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

System Requirements

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

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

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

- Operating Systems—The system supports Microsoft[®] Windows[®], Linux[®], Chrome OS[™], Android[™], iOS, and OS X[®] desktop class operating system software.
- Minimum Hardware Requirements—The system supports the following hardware:
 - Intel[®] Core[™] Duo processors or Advanced Micro Devices, Inc. (AMD) processors manufactured in 2012 or later
 - 2 gigabytes (GB) of random-access memory (RAM)

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

Page Navigation

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	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							
	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							
	CC-15-1813 - ******** 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.

ation *		
Select ÷		
location is Required.		
Case number format is default.		
ase Number \star		
Case Number is Required.		
	CANCEL SEARCH	

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

≡ 🐝 eFile Case S	arch 🛛 🖓 🗸	.	•	
← DASHBOARD				REFINE SEARCH
Eiguro 4.4	Case Secret Dere with No Secret Beculte Displayed			

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.

= 🐝 eFile Filing History					0- ⊕		L montre consignate.com
Filing History Filter	FILING HISTORY	FILING DRAFTS					2 Result(s) Page 1 of 1
Status		e # 165244 Submitted 01/28/2020 3:53 PM by Pro Se					
All Statuses Accepted Cancelled	Filing Status Submitted	Filing Code Acquittal	Filing Type eFile Only	Filing Description	Cia	nt Ref #	8
 Receipted Served Returned 	Envelop	e # 165149	er no entry				
O Submitted O Submitting	Envelope # 165149 :	Submitted 01/24/2020 9:22 AM by Pro Se Filing Code	Filing Type	Filing Description	Cla	nt Ref #	
Any Location +	Reviewed	Acknowledgement	eFile Only				2 Result(s) Page 1 of 1
Case Number / Envelope Number	Previous 1	VEAT					
Case Number							
Envelope Number							
Date Range							G
Arytime Last Month Last Week Last Week Last Two Days Today Pick a Custom Range From Date							
To Date							

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					? -	⊕ - Ⅲ-	A monerous and a state -
Filing Drafts Filter	FILING HISTORY FILING	G DRAFTS					66 Results Page 1 of 4
Location	Draft # 6666 Draft # 6666 Started 10/24/19						
Any Location \$,					
Case Number / Draft Number	Filing Status Draft	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description Acknowledgement		Client Ref #	
Case Number	Draft # 6659						
Draft Number	Draft # 6659 Started 10/23/19						
Date Range	Draft # 6658 Started 10/23/19						
 Anytime Last Month 	Draft # 5593						
O Last Week O Last Two Days	Draft # 5593 Started 10/11/19						
O Today	Draft # 5592 Draft # 5592 Started 10/10/19						
O Pick a Custom Range From Date	Draft # 5587 Draft # 5587 Started 10/10/19						Image: A state of the state
To Date	Filing Status Draft	Filing Code	Filing Type eFile Only	Filing Description		Client Ref #	
RESET FILTER	Draft # 5560						Image:
	Draft # 5560 Started 10/8/19 1						
	Draft # 5557						

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-	.	 -	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				r 🗈 🗄
Case Number Case Description	Case # 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		l≽				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			₽- ⊕- Ⅲ	• 1 minerescongense.com •
Filter Type My Templates \$	Name	FILTER RESET		
Favorite	Name	Туре		Actions
*	Tyler Group	New Case		
☆	My Name change template	New Case		
☆	Existing Case Template	Existing Case		<i>I</i>
☆	Template #5	New Case		
☆	Thursday Template	New Case		
☆	Pro Se Template	New Case		
☆	Thursday Template #2	New Case		
☆	Current Case Template #2	Existing Case		<i>I</i>
습	Template #3	New Case		

Figure 1.8 – Templates Page

My Payment Accounts

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

≡ 🤹 eFile Payment Accounts			Ø- (•• III• 💄 Nonarrannyaaan oo •
Account Name	Account Type Select	¢ Account Status	• FILTER RESET	ADD ACCOUNT
Payment Account Name	Payment Account Type	Status	Last 4 Digits	Actions
Mary Ann's Waiver	Waiver	Active		
Previous 1 Next				1 Result Page 1 of 1

Figure 1.9 – Payment Accounts Page

My Service Contacts

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

■ ◆ eFile Service Contacts			₽- ⊕-	
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	gmail.com	1	
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



My Information

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

= 🐝 eFile My Information				? -	.	 -	L
country United States							
Address Line 1 * 1234 Main st		Address Line 2					
City ★ Plano	State * Texas	\$	Zip Code * 75024				
Phone Number * 9727133770							
							SAVE

Figure 1.11 – My Information Page

Account Settings

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

= 🐝 eFile Account Settings		? -	 -	 -	A PROBERT CONTINUES
Old Password 🗚					
Old Password is Required.					
olu 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 1.12 – Account Settings Page

Reports

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

EFILE QA 01 Reports			?-	. -	 -	1	
Reports							
	ainst envelopes submitted during a selectable time frame up to 60 days.	* Provides envelope and filing level information specific to fees. * Deli	ivered in an Excel sp	readsheet to	allow for filter	ring and searching.	
All SELECT							
✓ All Statuses	Reviewed	Date From 🗚		Date To 🛪	ĸ		ė
Cancelled	 Served Submission Failed 	Date From is Required.		Date 1	To is Requir	ed.	
Returned	Submitted					CANCEL	DOWNLOAD REPORT
\triangleright							

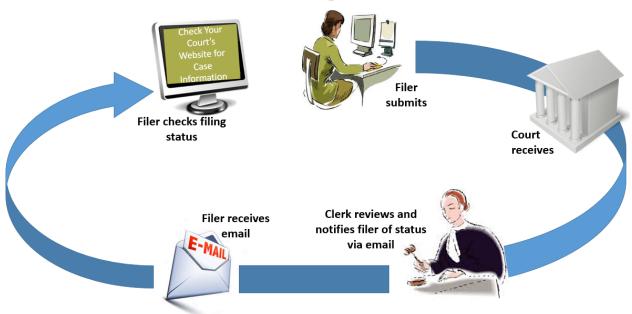
Figure 1.13 – Reports Page

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[®] File & Serve[™], he or she can electronically submit documents (referred to as "filings") to the court. When the user submits the filing, the filing is electronically delivered to the clerk's inbox. The clerk then reviews the filing and either accepts, rejects, or returns the filing.

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

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

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

Filing Queue Status

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

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

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

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 an Individual Filer
- Resetting Your Password
- Changing the User Password
- Updating User Information

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



Figure 3.1 – eFile Landing Page

Registering as an Individual Filer

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

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

To register as an individual filer:

1. On the *Landing* page, click

The Registration - Select Type page is displayed.

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



Figure 3.2 – Registration – Select Type Page

INDIVIDUAL 2. Click

The Registration - User Information page is displayed.

■ selle Registration - User Information				? -	.	 -	ANONYMOUS -
Select Type User Information Contact Information							
First Name *	Middle Name		Last Name 苯				
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.

4. Complete the address and phone number fields.

■ ✓				8-	.	 -	ANONYMOUS -
Select Type User Information Contact Information							
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.				
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

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.

E 🤹 eFile Terms And Conditions	Ø-	•-	 -	ANONYMOUS -
File Usage Agreement Velocement to the online services of Tyler Technologies for Qonos . Please read this Agreement carefully. It governs Your access to and use of the Ddyssey File & Serve application through the Tyler Technologies In steand/or other Tyler products is conditioned upon Your accesshare 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 this Agreement. By clicking on the "I Accept" button, You are agreeing to be legally bound by all of the terms and conditions of this Agreement will bind Your employer. Section 1. Definitions Section 2. License, Restrictions on Use Section 3. Access to the Tyler Internet Site Section 4. Initiations on Use Section 4. Findiations on Use Section 5. Fer Schedule Section 5. Proprietary Rights Section 6. Your Warranties and Limitations Section 8. Your Warranties and Initiations Section 9. Limitations of Liability Section 10. Arbitration Section 9. Limitations Section 9. Limit				
Section 11. Insistentiateous Section 12. Definitions The 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 terms and con subhorized 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 graphical inform to the Odysey File & Serve program. "Enhancement" means any correction, modification, customization, revision, enhancement, improvement, update, upgrade, new release or other change that is released ger pervices. "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, documents through 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 intellectual Director, cords, 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 Tyler Tech Divisions. "Tyler Internet Site" means the Tyler Services. Tyler Services "means, Application and any related services made available to You and Authorized User from Tyler from time to time. "Tyler Technology" means any know-how, processes, methodologies, specifications, designs, fin- thedods, applications, computer programs, user manuals, on-lind occumentation, products or other technology and materials of any kind, or any Ethancement thereto, used by Tyler in connection with the perfor Tyler to You, any Authorized User or any third party through the Tyler Internet Site. "License." License: Restrictions on Use 2.1 License.	mation ii nerally b roperty nologie , collect ventions rmance hout lim	n electroni by Tyler Teo als, and ot right. 'Thir s, Inc. and ively, Tyler s, functiona of the Tyle itation, an	c form suit chnologies her informa d Party Con its operatir 's Odyssey ility, graphic er Services y bulk resel	able for submission for the Tyler tion accessible ttent" means any ig units and File & Serve s,s techniques, or made available by ling involving any
1.1 License. Subject 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 during the term Jeers 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 party rights				

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.

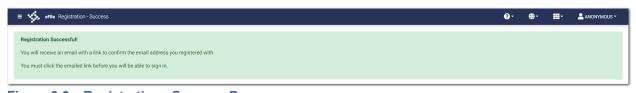


Figure 3.6 – Registration - Success Page

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.

I FORGOT MY PASSWORD

Resetting Your Password

To reset your password:

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

Reset Password

Email Address is Required.

Image: Image:

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.

RESET PASSWORD

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.

Re	eset Password	×
	Click the link in your email to complete the password reset process.	
	CLOS	

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: <code>Your password has been changed successfully</code>.

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.

≡ 🐝 eFile Account Settings		? -	.	 -	L PROBETTI COLLUMN
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	necial characters and at least one canital 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 User Information

You can update your personal information.

To update your personal information:

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

The My Information page is displayed.

≡ 🐝 eFile My Information				?-	 -	2 million - 100 -
Country United States +						
Address Line 1 🗰 1234 Main st	,	Address Line 2				
City ★ Plano	State *	\$	Zip Code * 75024			
Phone Number * 9727133770						
						SAVE

SAVE

Figure 3.11 – Sample My Information Page

2. Update any information as needed, and then click

ESO-FS-200-4494 v.11



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	
	Password	
	Password Sign In	
Forge	ot your password? RESET PASSWORD CL	.OSE

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 filer actions.

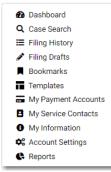


Figure 5.1 – Dashboard

From here, you can perform the following actions:

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

Dashboard Page

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

= 🐝 eFile Dashboard		0 - ⊕- Ⅲ - ≜ maarranaan ama-
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
	Case # cc-15-1813 Envelope # 157230 Submitted at 11/05/2019 9:06 PM Filings: Accepted (1)	Draft ≢ 9060 Started at 01/22/2020 1:42 PM
START FILING	View Filing History	View My Drafts
Case Search Q	Bookmarks	Templates
	CC-15-1813 - ******** 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 5.2 – Dashboard Page

Account Setup

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

You are not read	y to file electronically!		×
A payment account	is required to file electronically		
CREATE PAYMENT	Missing		
		REMIND ME LA	TER

Figure 5.3 – Warning Message

Start Filing

Click to start a new case filing or to file into an existing case.
Note: While you are entering a case filing, click to view the case number or draft number.

Filing History

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

= 🐝 eFile Filing History					⊙ - ⊕- Ⅲ-	▲ monarrow ran tagatana
Filing History Filter		G DRAFTS				2 Result(s) Page 1 of 1
Status	Envelope # 165244 Submitted	165244 01/28/2020 3:53 PM by Pro Se				
 All Statuses 	Envelope # 103244 Subinitied	01/20/2020 3.33 PM by PIO 3e				
O Accepted	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Cancelled Receipted	Submitted	Acquittal	eFile Only			
O Served O Returned	Envelope #	165149				
O Submitted O Submitting	Envelope # 165149 Submitted	01/24/2020 9:22 AM by Pro Se				
	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Location	Reviewed	Acknowledgement	eFile Only			
Any Location \$	Previous 1 Next					2 Result(s) Page 1 of 1
Case Number / Envelope Number						
Case Number						
Envelope Number						
Date Range						Ç,
Anytime						
O Last Month						
O Last Week						
O Last Two Days						
O Today						
O Pick a Custom Range						
From Date						
To Date						
RESET						

Figure 5.4 – Filing History Page

Drafts

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

≡ 🐝 eFile Filing Drafts					8 -		±
Filing Drafts Filter	FILING HISTORY FILING	DRAFTS					66 Results Page 1 of 4
Location	Draft # 6666 Draft # 6666 Started 10/24/19 3	:31 PM by Pro Se					
Any Location 🗢		Filing Code				Client Ref #	
Case Number / Draft Number	Filing Status Draft	Acknowledgement	Filing Type eFile Only	Filing Description Acknowledgement		Client Ker #	
Case Number	Draft # 6659						
Draft Number	Draft # 6659 Started 10/23/19 4	:56 PM by Pro Se					
Date Range	Draft # 6658 Started 10/23/19 4	:21 PM by unknown					
Anytime Last Month	Draft # 5593 Draft # 5593 Started 10/11/19 8						i
O Last Week O Last Two Days O Today	Draft # 5592						► Î :
O Pick a Custom Range	Draft # 5592 Started 10/10/19 9	:13 PM by Pro Se					
From Date	Draft # 5587 Draft # 5587 Started 10/10/19 1	:59 PM by Pro Se					
To Date	Filing Status Draft	Filing Code	Filing Type eFile Only	Filing Description		Client Ref #	
RESET FILTER	Draft # 5560						
	Draft # 5560 Started 10/8/19 1:	49 PM by Pro Se					

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.

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

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.

le into Existing Case	×	
Location *		
Select €		
Location is Required.		
Case number format is default.	Q	
Case Number 🗚		
Case Number is Required.		
		_
	CANCEL SEARCH	

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

If your search does not produce any results, click	← DASHBOARD	to return to the	e Da	shbo	ard page.
≡ 🐝 •File Case Search		? -	•-	 -	
← DASHBOARD					REFINE SEARCH



Bookmarks

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

= 🐝 eFile Bookmarks				? -	••	 -	• ************************************
Bookmark Filter							4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description				
Any Location	Cape#	Location	Case Description				
Case Number	CC-19-2373	OFS QA 2017 - Court at Law	Drina Colin v. McDonald Associates LLC				
Case Number	Cape #	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 1
			₿.				

Figure 5.9 – Sample Bookmarks Page

Templates

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

≡ 🐝 eFile Templates				0 -	٠.		• more the composite com-
Filter Type My Templates	Name		FILTER RESET				ADD TEMPLATE
Favorite		Name	Туре				Actions
*		Tyler Group	New Case				
☆		My Name change template	New Case				
☆		Existing Case Template	Existing Case				1
☆		Template #5	New Case				Image:
☆		Thursday Template	New Case				
☆		Pro Se Template	New Case				
☆		Thursday Template #2	New Case				
☆		Current Case Template #2	Existing Case				<i>d</i> * :
☆		Template #3	New Case				۱

Figure 5.10 – Templates Page



Topics covered in this chapter

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

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

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

Adding a Waiver Payment Account

To set up a waiver payment account:

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

The Payment Accounts page is displayed.

■			Ø• ⊕	• 🛄 • 💄 MORETTA, COLONGARI, COM •
Account Name	Account Type Select	¢ Account Status	FILTER RESET	ADD ACCOUNT
Payment Account Name	Payment Account Type	Status	Last 4 Digits	Actions
Mary Ann's Waiver	Waiver	Active		1
Previous 1 Next	G			1 Result Page 1 of 1

Figure 6.1 – 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

CREATE WAIVER

Figure 6.2 – 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 My Payment Accounts.

The Payment Accounts page is displayed.

≡ 🐝 eFile Payment Accounts			Ø- (†)	• III • 🛓 moneration genue con •
Account Name	Account Type Select	Account Status Select	• FILTER RESET	ADD ACCOUNT
Payment Account Name	Payment Account Type	Status	Last 4 Digits	Actions
Mary Ann's Waiver	Waiver	Active		1
Previous 1 Next	6			1 Result Page 1 of 1

Figure 6.3 – 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			
Account Name is Required.				
				CANCEL CREATE WAIVER
Waiver	Waiver	Active		1
First Previous 1 Next Last				1 Result(s) Page 1 of 1

Figure 6.4 – 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			×
🔆 ty	er chnologies	VII	HU)	
Paymen	t Information			
	Method of Payment Credit Card e-Check			

Figure 6.5 – Enter Information Window

5. Select the Credit Card option.

The Payment Information pane is displayed.

Enter Information		×
Sector Example Constant	ion	
Method of Payme © Credit Card © e-Check		
Cardholder Infor Enter the informati asterisk (*) are rec	on as it appears on the Cardholder Account. The fields marked with a red	
Car	d Type 🔹 🔻	
Card N	umber *	
Exp	Month MM * Exp Year YYYY *	
cv	V Code * CVV Help	
Name o	n Card Maximum of 30 characters	
Addres	s 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 v *	
Zi	p Code	
	Continue	

Figure 6.6 – 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 $\ensuremath{\text{CVV}}$ 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.

	rmation er chnologies	
Verify B	illing Information	
	Billing Detail	MASTERCARD
		*********5454
	Exp Date	
	CVV Code	***
	Name on Card	Joe Smith
	Address Type	US
	Address Line 1	123 Main St.
	Address Line 2	
		Plano
	State	
	Zip Code	75024
	Terms and Conditions This is a confidential and secure site that doe third parties. By setting up this account you a conditions.	

Figure 6.7 – Verify Billing Information Pane

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

click and make any necessary changes.

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

Adding an E-Check Payment Account

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

To set up an e-check payment account:

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

The Payment Accounts page is displayed.

≡ 🐝 eFile Payment Accounts			⊙ - ⊕-	· · · · · · · · · · · · · · · · · · ·
Account Name	Account Type Select	Account Status Select	FILTER RESET	
Payment Account Name	Payment Account Type	Status	Last 4 Digits	Actions
Mary Ann's Waiver	Waiver	Active		1
Previous 1 Next	L3			1 Result Page 1 of 1

Figure 6.8 – 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	t		
Account Name is Required.				
				CANCEL CREATE WAIVER
Waiver	Waiver	Active		Ø
First Previous 1 Next Last				1 Result(s) Page 1 of 1

Figure 6.9 – 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

The Enter Information window is displayed.

ENTER INFORMATION

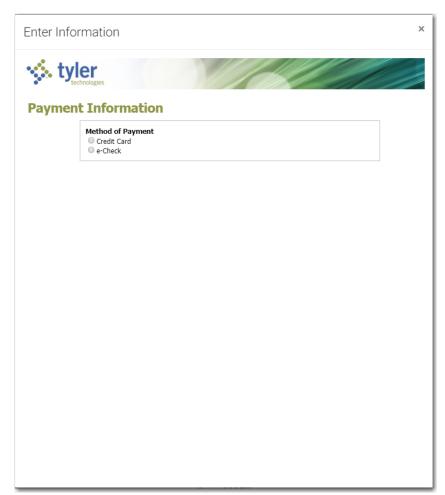


Figure 6.10 – Enter Information Window

5. Select the e-Check option.

The Payment Information pane is displayed.

Enter Information	×
Sector Explore 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 6.11 – 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 Infor	rmation	×
view tyles	er	
Verify B	illing Information	
	Billing Detail Account Type	Checking
	Account Number	****5678
	Routing Number	113000023
	Name on Account	Joe Smith
	Address Type	US
	Address Line 1	123 Main St.
	Address Line 2	
	City	Plano
	State	тх
	Zip Code	75024
	Terms and Conditions This is a confidential and secure site that does not third parties. By setting up this account you agree conditions.	
		Back Save Information

Figure 6.12 – 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 **My Payment Accounts**.

The Payment Accounts page is displayed.

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

≡ 🐝 eFile Payment Accounts			Ø- (• III• 💄 maarraraa magaalaa ahaa •
Account Name	Account Type Select	Account Status Select	÷ FILTER RESET	ADD ACCOUNT
Payment Account Name	Payment Account Type	Status	Last 4 Digits	Actions
Mary Ann's Waiver	Waiver	Active		1
Previous 1 Next	C ₂			1 Result Page 1 of

Figure 6.13 – 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

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

SAVE Then, click

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

Deleting a Payment Account

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

To delete an existing payment account:

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

The Payment Accounts page is displayed.

= 🐝 eFile Payment Accounts				? -	.	 .	A monerour against contraction -
Account Name	Account Type Select	¢	÷ FILTER RESET				
Payment Account Name	Payment Account Type	Status	Last 4 Digits				Actions
Mary Ann's Waiver	Waiver	Active					1
Previous 1 Next							1 Result Page 1 of 1



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"?



7 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 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.

≡ 🐝 erile 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				
	CC-15-1813 - ******** 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 7.1 – 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	? -	-	 -	•
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 7.2 – 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	∂ - ⊕- <u>Ⅲ</u> - <u>▲</u>
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Locaton * 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	
	(D Help
Eigure 7.2 Stort Filing Dage with Case Dense Di	enleyed

Figure 7.3 – 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 •	? -	. -	 -	.
Documents Case Parties Fillings Service Fees Summary				
C 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).				
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.

to view the case number or draft number.

≡ 🐝 EFILE QA 01 Case Information - Draft # 244 0 -		0 - ⊕- Ⅲ- ≜	-
Documents Case Parties Filings Service Fees Summary			
Loaston # OFS MockCMS	\$	Case Category * Select Case Category Is Required.	*
Cere Type * Select	÷		
Case Type is Required.			
← UPLOAD DOCUMENTS SAVE AND EXIT		PARTIE	ES≯

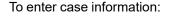
Figure 7.5 – Case Information Page

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.

Note: While you are entering a case filing, click



- 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.

			? -	. -	 ·
cuments Case Parties Filings Service	Fees Summary				
ition 🖈		Case Category *			
DFS QA 2017		\$ Civil			
з Тура ж		_			
otice Of Removal		•			
edures / Remedies		Damage Amount			
SELECT		Select			
Case Address					
iountry 🕷					
United States	+				
Address Line 1 🗶					
Address Line 1 is Required					
	State *		Zip Code \star		
	State * Select	•	Zip Code 🛊		
ity *		•	Zip Code * Zip Code is Required.		
ny * City is Required.	Select	٤)			
ity * City is Required.	Select	٤)			
ity * City is Required.	Select	۵			
Address Line 1 is Required. City is Required. County * County is Required.	Select	8			



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 0-			? -	.	 -	·
Documents Case Parties Filings Service Fees Sum	nmary					
Location 🗚		Case Category 🗱				
OFS QA 2017	\$	Civil				+
Case Type *						
Notice Of Removal	\$					
Procedures / Remedies		Damage Amount				
SELECT		Select				\$
Case Address						
Country *						
United States \$						
Address Line 1 * 555 Main Street						
City * State *			Zip Code ¥			
Dallas Texas		+	75220			
County *						
Dallas						
← UPLOAD DOCUMENTS SAVE AND EXIT						PARTIES ->

Figure 7.7 – Sample Case Information Page—Case Address Pane Completed

	Parties 🗲		SAVE AND EXIT	
4.		to save your work and continue, or click		to save your work and
	exit the filing.			

Entering Case Information for a Civil Case

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

Before you can file a new case, 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		
OFS MockCMS	6						\$	Case Category * CIVII	\$
Case Type *	and and						¢	Case Sub Type Select	\$
Case Type is Rea Procedures / Remedies SELECT								Damage Amount Select	\$
← UPLOAD DOCU	MENTS	SAVE AND EXI	т						PARTIES ->

Figure 7.8 – 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 Procedu	ures / Remedies	
Select	Procedure / Remedy	
	Appeal	
	Class Action	
	Garnishment	
		CANCEL SAVE

Figure 7.9 – 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 * Damages - \$10.50 ¢	Case Sub Type Select	¢
Procedures / Remedies SELECT Class Action	Damage Amount Over \$5000	÷
UPLOAD DOCUMENTS SAVE AND EXIT	₽ P/	ARTIES →

Figure 7.10 – Sample Completed Case Information Page

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

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 🕕 -		8-	⊕- Ⅲ-	A 100011-0011000-000-
Documents Case Parties Filings Service Fees Summary				
Control * OFS MockCMS	Case Category ¥ Select			\$
	Case Category is Required.			
Case Type *				
Select				
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.

Documents Case Parties Filings Service Fees Summary		
Location # OFS QA 2017	Case Category *	٥
Cite Type ★ City Ordinance Cases - \$10.50	Case Sub Type Select	٥
Procedure / Formelies SELECT	Damage Amount Select	\$
		ADD CASE CROSS REFERENCE
Case Cross Reference Type * Warrant Number (CM) •	ase Cross Reference Id	Actio
	Cross Reference Type "Warrant Number" is required and must be 6 numbers long	
* Warrant Number (CM) +	Cross Reference Type "Warrant Number" is required and must be 6 numbers long	
← UPLOAD DOCUMENTS SAVE AND EXIT		PARTIES →

Figure 7.12 – 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.

C

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

ocuments Case Parties Filings Service Fees Summary			
scation *		Case Category *	
OFS QA 2017	•	Civil	•
зве Туре 🕊		Case Sub Type	
City Ordinance Cases - \$10.50	\$	Select	¢
ocedures / Remedies		Damage Amount	
SELECT		Select	÷
ase Cross Reference Type	Case Cross Refer	ence Id	Actic
ase Cross Reference Type	Case Cross Refer	ence Id	Actic
* Warrant Number (CM)	\$ 123456		
Warrant Number (CM)	\$ 345678		
Case Cross Reference Number	♦ 124567		Î
			1
Uniform Case Number	\$ 567432		-

Figure 7.13 – Example of a Case Information Page with Case Cross Reference Numbers Added

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

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	? -	.	 -	.
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loato * Select \$				
Location is Required.				
← DASHBOARD				
2				
				D Help

Figure 7.14 – 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.	
Leastion * 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	
C∌	
	() Help
Figure 7.45 Stort Filing Dage with Coop Dense Dien	leved.

Figure 7.15 – 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.

=- 🐝	EFILE QA 01	Upload Docum	nents - Draft #	599 🚺 -						0 -	۰.	 -	·
Documents	Case	Parties	Filings	Service	Fees	Summary							
							🚯 Drag files here	Dr BROWSE					
Maximum Filesize:													
Supported File Typ	es: TIFF Files (1	TIFF TIF) WordPerf	ect File (WPD) We	ord 2007 File (DOC	CX) Word 97/XP	File (DOC) Portable [ment File (PDF) XML Document (XML)	Windows Media File (V	WMV) MPEG (MPEG) .				
SAVE AND EXIT													CASE INFORMATION ->

Figure 7.16 – Upload Documents Page

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 1 -	0 ∗ ⊕∗ Ⅲ ∗ ≜
Documents Case Parties Filings Service Fees Summary	
Location # OFS MockCMS •	Crea Category * Probate or Mental Health e
Case Type * Probate of Will e	Case Sub Type Select
Will Fluid Date # 0/10/2020	
← UPLOAD DOCUMENTS SAVE AND EXIT	PARTIES →

Figure 7.17 – 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 Parties	Filings Service Fee	s Summary			
Party Type	Required Party	Party Name			Actions
Defendant	This is a required Party				A
Personal 🛕 Address	Additional Identifiers				Hide Details
Party Type Defendant					
Personal Information					
I AM THIS PARTY					
First Name 🔻		Middle Name	Last Name 🛊	Suffix Select	•
First Name is Required.			Last Name is Required.		
Party CMS ID		Select •			
Attorney Information				Let	
Lead Attorney Select	•				
UbioL.	•				GO TO ADDRESS
Plaintiff	This is a required Party				A
					add Party
← CASE INFORMATION SAVE AND EXIT					FILINGS →

Figure 7.18 – Personal Tab on the Parties Page

Note: While you are entering a case filing, click

i۰

to view the case number or draft number.

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. If you are the first party,

Also, if appropriate, select the party's suffix from the **Suffix** drop-down list.

Your name will be entered in the fields.

- 3. Type the party case management system ID in the Party CMS ID field, if appropriate.
- 4. Select a language from the Interpreter drop-down list, if appropriate.
- 5. Select Pro Se for the filing attorney.

GO TO ADDRESS

to enter the address information for the first party.

click

6. Click

Party Type	Required Party	Party Name			Actions
Defendant	This is a required Party	Kay Defendant			ø
Personal Address	Additional Identifiers				Hide Details
Country United States Address Line 1 City		state Select	Address Line 2	Zip Code	
		Phone Number			GO TO ADDITIONAL IDENTIFIERS
Plaintiff	This is a required Party	John Plaintiff			A

Figure 7.19 – Address Tab on the Parties Page

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

8. Click	GO TO ADDITIONAL IDE	ITIFIERS to add more information for the	specified party.
Party Type	Required Party	Party Name	Actions
Defendant	This is a required Party	Kay Defendant	1
Plaintiff	This is a required Party	John Plaintiff	2
Personal	Address Additional Identifiers		Hide Details
Date of Birth MM/DD/YYYY	6		
Figure 7	.20 – Additional Ident	fiers Tab on the Parties Page	
9. Type calen		in the Date of Birth field, or click 🔲 to	select the date from the
10. Click	to enter information	tion for the other required party.	
11. Comp	plete all of the required	ields for the second party.	
	have another party to been added to the case		nue to add parties until all parties
13. Click	FILINGS → to save	your work and to continue.	
		draft, you can stop working on the filin draft, navigate to the <i>Dashboard</i> page.	
My Draft	s. Locate the specifie	d draft, and then click	

Entering Date of Death on Parties Page

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

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

Note: Your screens may vary from the examples provided.

Documents Case Parties Filings	Service Fees Summary		
Party Type Required Pa	rty Party Name	Lead Attorney	Actions
Defendant This is a rec	uired Party		🔺 🗾
Personal 🛕 Address Additional Ider	tifiers		Hide Dotalis
Party Type Defendant			
Personal Information			
Person O Entity			
First Name 🖈	Middle Name	Last Name *	Select ¢
First Name is Required.		Last Name is Required.	
Party CMS ID	select	¢	
Aller and the formation			
Attorney Information			
ADD/EDIT ATTORNEYS 🎎			GO TO ADDRESS
Plaintiff This is a rec	uired Party		▲ 🖉
		4	ADD PARTY
← CASE INFORMATION SAVE AND EXIT			FILINGS →

Figure 7.21 – 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

E 🎪 EFILE QA 01 Start Filing	8-	.	 -	L
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Locator * Select				
Location is Required.				
←DASHBOARD				
5				
·v				
				D Help

Figure 7.22 – 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	⊘ - ⊕- <u>Ⅲ</u> - <u>▲</u>
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Laaston * OFS MackCMS =	
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	
β	
	Ø Help
Eiguro 7.22 – Start Filing Page with Case Panes D	ianlayad

Figure 7.23 – 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 🕜 -	? -	.	 -	
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 7.24 – Upload Documents Page

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

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

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		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 7.27 – 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 🕕 -				? -	.	•	L DEFENSION CON-
Documents Case	Parties Filings Servi	ce 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		Date of Death ★ 01/02/2020	(the second seco					
Respondent		Mary Smith		Tim Cook				1
								C ADD PARTY
← CASE INFORMATION	SAVE AND EXIT							FILINGS →

Figure 7.28 – 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 🚯 -					0 - ⊕-	∷ - ≜	-
Documents Case Parties	Filings Service Fees Summary						
Filing Code	Client Ref #	Filing	ng Description				Actions
							🔺 🗹 🗊
Details 🛕 Optional Services	Communication						Hide Details
Filing Type * eFile Only		•	Filing Code *				\$
		-	Filing Code is Required.				
Filing Description				Client Reference Number			
Comments to Court							
							li
						GC	TO OPTIONAL SERVICES
Filing on behalf of 🚯							
ASSOCIATED PARTIES							
Upload Documents*							
Select a filing code before uploading doc					La.		
					<i>v</i> s		ADD FILING
← PARTIES SAVE AND EXIT						SKIP TO FEE	S→→ SERVICE →

Figure 7.29 – 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	→
lit Fee Service	\$10	→
ertified Copies	?? × \$5	→
r Page Fee Service	₩ x	→
nce Per Party	\$10	→
iority Processing	?? × \$4	→
aceholder Service 1		→
aceholder Service 2 with a long description to trig rrizontal scrolling	iger	→
aceholder Service 3		→
aceholder Service 4		→
IGA Decline Error	\$280	→
oken Fee	\$10	→
r Page Fee No Multiplier		\rightarrow

Figure 7.30 – 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	Party Type 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.

Figure 7.31 – 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

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 7.32 – 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 (T	IFF TIF) WordPerfect File (WPD) Word 2007 File (DO	CX) Word 97/XP File (D	OC) Portable
Document File (PDF) XML Docume	nt (XML) Windows Media File (WMV) MPEG (MPEG)		

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

Figure 7.33 – 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 Attachments section.
18. If you want to add security to any of the documents, select an option from the Security drop-down list.
19. If you want to add another filing, click . Then, repeat the same steps for the next filing.
20. After you have added all of the filings, click 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	
6	h VERIFY
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 7.35 – 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		
Return Date 04/06/2020	i	VERIFY

Figure 7.36 – 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 7.37 – 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:

S	TΑ	RT	FI	LIN	G
-		•••	• •		-

1. From the *Dashboard* page, click

5	I P	١R		LI	9

= 🎪 eFile Dashboard		Ø• ⊕• 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 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)	
START FILING	View Filing History	View My Drafts
Case Search Q	Bookmarks	Templates
	CC-15-1813 - ******** 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 7.38 – Dashboard Page

The Start Filing page is displayed.

?-	. -	 -	▲
			O Help
	0 -		●・ ●・

Figure 7.39 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

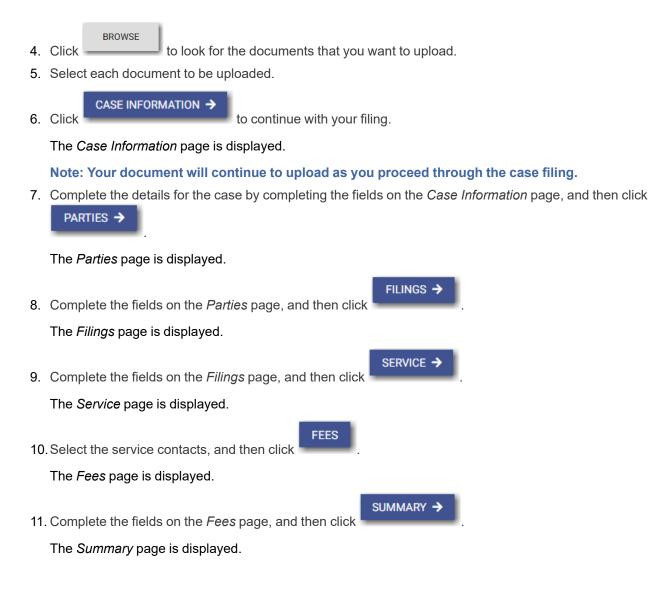
EFILE QA 01 Start Filing	0 - ⊕- Ⅲ - ≜
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
CFS MackCMS =	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHBOARD	
2	
	() Help
Eigure 7.40 Stort Filing Dage with Case Dense F	Newleyed

Figure 7.40 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Upload Documents page is displayed.



eturn Date Mana Sevela	¢1	Tele Viller Viller		Return Date
turn date must be verified.		u roar		Agreements Case Parties
ubmission Agreements				Filings Service
ase S MockCMS	Catiopary Civil		Tos Malpractice	Fees SUMMT
arties				Calculating Fees
lings				1
ling Type File Only	Pling Code Acknowledgement	Cleant Ref #	Filing Description	
Intervent Lead Document Overland Version Original	Decoment Name reduct this, pdf	Description Acknowledgement	Security	
ervice				,
es				/
sen Account sh Payment	Pring Amorey Perry Mason	Party Responsible for Fees ABC Company	Pair Type Default	

Figure 7.41 – 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	台 VERIFY

Figure 7.42 – 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	İ	VERIFY

Figure 7.44 – 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		VERIFY
Return date must be verified.		

Figure 7.45 – 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.

🔆 eFile	Schedule Hearing			? -	.	 -	
hedule 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	2			
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						SAV



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		@ - ⊕- 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
	CC-15-1813 - ******** 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 7.47 – Dashboard Page

The Start Filing page is displayed.

= 🎪 EFILE QA 01 Start Filing	? -	. -	 -	2 martingani (a
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loaton * Select \$				
Location is Required.				
← DASHBOARD				
C2				
				Ø Help

Figure 7.48 – 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	0 • ⊕• Ⅲ• ≜
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	
3	
	() Help

Figure 7.49 – Start Filing Page with Case Panes Displayed

START A NEW CASE

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 0 •	0 - ⊕- 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	parties >

Figure 7.50 – 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 #	11518 🗊 -				(? - ⊕-	 -	
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.	\$				2			
Personal Informatio	on							
Person O Entity First Name *		Middle Name		Last Name \star		Suffix		
						Select		\$
First Name is Required.				Last Name is Required.				
Party CMS ID		Interpreter Select	÷					
		Select	·					
Attorney Informatio	n							
ADD/EDIT ATTORNEYS								GO TO ADDRESS
← CASE INFORMATION	SAVE AND EXIT							FILINGS >

Figure 7.51 – Parties Page

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

FILINGS 🗲

The Filings page is displayed.

	arties Filings Service Fees	Summary	Hearing			
ng Code	Client Ref #	Filir	Description			Actions
						🔺 🗾 🗈
Details 🛕 Optiona	l Services Communication					Hide Det
Filing Type \star			Filing Code 🗚			
eFile Only		\$	Select			¢
			Filing Code is Required.			
Filing Description				Client Reference Number		
Comments to Court 1						
						/
					GO TO OP	FIONAL SERVICES
-						
Filing on behalf of ASSOCIATED PARTIES						
	*					
Upload Docume						
	ng documents.					
Select a filing code before uploadi						

Figure 7.52 – Filings Page

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



The Service page is displayed.

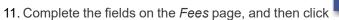
≡ 🐝 Service - Dr	aft # 11518 🚯 🔹			0 - ⊕- Ⅲ	
Documents Cas	e Parties Filings Service	Fees Summary Hearing			6
d Service Contacts:					
FROM MY FIRM	2+ FROM PUBLIC LIST	W CONTACT			
Parties		Service Contacts			Show Al
Type: Petitioner	Name: Harry Jones	Name	Email/Mail		Count: 0
		No service contacts	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

Figure 7.53 – Service Page



10. Select the service contacts, and then click

The *Fees* page is displayed.





The Summary page is displayed.

eturn Date					
Of State Service					
] here Einler				Return Date	
um Date		(1889) (1889)		Agreements	
turn date must be verified.				Case	
an date mea, de terrete.				Parties	
bmission Agreements				Filings	
se				Service Frees	
in the second	Galagory		Types	SUBAT	
MockCMS	DVI		Mapsettor		
rties				×)	
2				Calculating Fees	
ings				1	
ing type	Filmp Code	Chart Ref #	Magibasyption		
The Cely	Advoviedgement				
angumeni zad Document	Document Name reductiblis.pdf	Constitution Acknowledgement	lanatiy		N
ndrad Versen Iginal					la la
rvice				1	
25				1	
et Assart Ef	Filing Attorney Perry Masion	Harty Texponentile for Frees Electron Smith MD	This Type Default		
				Waiver Selected	

Figure 7.54 – 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.

YA efile	 Schedule Hearing 				9- 0 -	 -	
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		2		
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						SAVE



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					0 - ⊕-	 -	• moneren zuer nyekana zona •
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 ₂
Anytime Last Worth Last Work Last Week Last Week Last Two Days From Date To Date REST FITE							

Figure 7.56 – Filing History Page

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

The envelope details are displayed.

etails - Envelope # 183169				PRINT SCHEDULE HEARING CLO
Case				
Location OFS MockCMS	Category Family		Type Division Of Property	
Parties				Show
Filings				\triangleright
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	Occurrent Name redactthis.pdf	Description	Security	
Download Version Original				
None				
Fees				
Payment Account Waiver	Filing Attorney Peter John Parker	Party Responsible for Fees George Jones	Filer Type Default	
Order ID	Transaction Response	Transaction Amount \$0.00	Transaction ID	
				Total \$0
				Waiver Selec
				SCHEDULE HEARING CLC



SCHEDULE HEARING

4. Click

The Schedule Hearing page is displayed.

S eFile	 Schedule Hearing 			3	•	•	
hedule 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	Ľ	2		
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				
revious 1	2 3 4 5 Next		45 Result(s) Page 1 o	<i>4</i> 5			
_							
OO NOT SCHEDU	ULE						SAV



SAVE

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

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

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

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 🕕				@* # * 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
Tiling 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 O Academic_Calender_Spring_2019.pdf	Select.	
Attachments		ADD DOCUMENTS			
					CADO FILINO
← PARTIES SAVE AND EXIT					SKIP TO FEES → → SERVICE →

Figure 7.59 – 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 7.60 – 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 Party Type Select. ÷ FILTER RESET Select Party Name Party Type Phil Defendant Defendant Susan Plaintiff Plaintiff 2 Result(s) Page 1 of 1 CANCEL SAVE

The Associate Parties to this Filing window is displayed.

Figure 7.61 – 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 Documents*									
Component Name	Actions	Description	Security						
Lead Document	ADD DOCUMENTS	This document is required.							
Attachments	ADD DOCUMENTS								

Figure 7.62 – 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 (T Document File (PDF) XML Docume	, , ,	,	(DOC) Portable

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

Figure 7.63 – Select document(s) for Lead Document Window

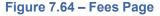
Note: If you have already uploaded a lead document, the document is listed in the window.

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
ADD DOCUMENTS
17. If you have attachments to add to the filing, click in the Attachments section.
18. If you want to add security to any of the documents, select an option from the Security drop-down list.
19. If you want to add another filing, click . Then, repeat the same steps for the next filing.
20. After you have added all of the filings, click .
The <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.	0 ∙ ⊕.	0 - ⊕- Ⅲ -
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 🛈 マ		⊙ - ⊕- Ⅲ - ≜
Documents Case Parties Filings Service Fees	Summary	
Ad Demourn * 6000	1 Damages	^
Payment Account *	Case Initiation Fee	\$10.50
Test Account +		Sub Total \$10.50
4 active Payment Method(s) are not listed due to being expired.		
Filing Attorney 🕄 *	🖹 Agreement (w/ Ad Damnum)	^
Tim Cook ¢		
Party Responsible for Fees *	Filing Fee	\$40.00 Sub Total \$40.00
Doreen Plaintiff		Sub lotal \$40.00
Filer Type	Service Fees	^
Default ¢		
	Total Service Fees	\$1.00
	Convenience Fee Total Court Service Fees	\$1.31 \$1.00
	Total Gourt service rees	Sub Total \$3.31
		Grand Total \$53
← SERVICE CONTACTS SAVE AND EXIT		SUMMARY

Figure 7.65 – 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 # 6703 🕕						? -	.	 -		
Documents Case Parties	Filings Service Fees Summary									
Filing Code	Client Ref #	Fili	iling Desci	scription					Actions	
									🔺 🗹 🧵	
Details 🛕 Optional Services	Communication								Hide Detai	rs I
Filing Type * eFile Only		•		ng Code * Select					•	
er ne Only		•		ling Code is Required.					•	
Filing Description					Client Reference Number					
Comments to Court										
									GO TO OPTIONAL SERVICES	
Filing on behalf of ASSOCIATED PARTIES										
Upload Documents*										
Select a filing code before uploading docur	ments.					Da				
									ADD FILING	
← PARTIES SAVE AND EXIT								S	KIP TO FEES → → SERVICE →	

Figure 7.66 – 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 7.67 – 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	\rightarrow
lit Fee Service	\$10	· · · ·
rtified Copies	?? × \$5	→
r Page Fee Service	₩ x	→
ice Per Party	\$10	· · · ·
iority Processing	?? × \$4	· · · ·
aceholder Service 1		→
aceholder Service 2 with a long description to t rizontal scrolling	rigger	→
aceholder Service 3		\rightarrow
aceholder Service 4		· · · ·
IGA Decline Error	\$280	→
oken Fee	\$10	→
r Page Fee No Multiplier		\rightarrow

Figure 7.68 – 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 RE	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.

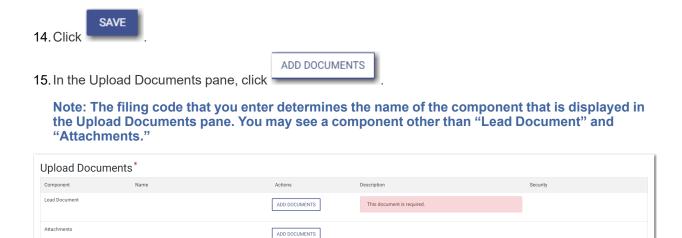


Figure 7.70 – Upload Documents Pane

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

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ 🗊			
	_			
	Drag files here o	r BROWSE		
Maximum Filesize: 50.00 MB				
Supported File Types: TIFF Files (T	IFF TIF) WordPerfect File (WP	D) Word 2007 File (DO	CX) Word 97/XP File (DOC) Por	rtable
Document File (PDF) XML Docume	ent (XML) Windows Media File	(WMV) MPEG (MPEG)		

Figure 7.71 – 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 filin	next FILING		t the same steps f	or the next filing.
21. After you ha	ave added all of the	e filings, click either	SERVICE → or	SKIP TO FEES	
Documents Case Parties	Filings Service Fees Summa	ary 🔪			
Filing Code	Client Ref #	Filing Description			Actions
Motions					🔺 🗹 🗊
Details Optional Services	Communication				Hide Details
Filing Type *		Filing Code * Motions - \$1234.00			•
Motion Type Select		\$			

Figure 7.72 – 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.

This do

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

To enter filing details:

Filing on behalf of **O** ASSOCIATED PARTIES

Upload Documents*

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

GO TO OPTIONAL S

= 🤸 Filings-Draft#9107 0*				Ø· ⊕- Ⅲ·	
Documents Case Parties Filings	Service Fees Summary				
Filing Code	Client Ref #	Filing Description			Actions
Waiver w/ special behavior					/ 1
Details Optional Services Communicat	tion				Hat Details
Filing Type *		Filing Code #			
eFile Only	R	Waiver w'special behavior			•
Filing Description			Client Reference Humber		
Comments to Court ()					
					GO TO OPTIONAL SERVICES
Pring on balant of ASSOCIATED PARTIES					
Upload Documents*					
Component	Name	Actions	Description	Security	
Leed Document	best polf	AUTO REDACT	Searpoor O	Select	٥
Attachments		A60 DOCIMENTS			
← NATTES SAVE AND EXT				x	Acco FILING SEPTO FIES → SERVICE →

Figure 7.73 – 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.

lot Selected		Selected	
ero Fee Service	\$1	→	
lit Fee Service	\$10	→	
ertified Copies	22 × \$5	→	
er Page Fee Service	n x	→	
nce Per Party	\$10	\rightarrow	
iority Processing	?? x \$4	\rightarrow	
laceholder Service 1		→	
laceholder Service 2 with a long description to t orizontal scrolling	rigger	· · · ·	
laceholder Service 3		\rightarrow	
laceholder Service 4		→	
DGA Decline Error	\$280	→	
oken Fee	\$10	\rightarrow	
er 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	iis 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 7.75 – 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.

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

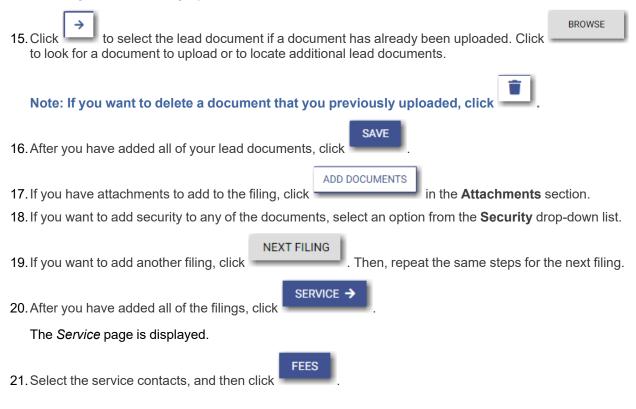
Figure 7.76 – Upload Documents Pane

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 7.77 – 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 0 -	
Documents Case Parties Filings Service Fee	s 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 ¢ SEAR	СН
Party Responsible for Fees is Required.	
Filer Type	
Select	٥
	ATE FEES
SERVICE CONTACTS SAVE AND EXIT	
SERVICE CONTACTS SAVE AND EAT	

Figure 7.78 – 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 🔞 -		? -	.	 -	• mernangen commenciant
Documents Case Parties Filings Service Fees	Summary				
Cluim Amount * 10000	Waiver w/ special behavior				^
Payment Account * New Account	Filing Fee				\$10.00 Sub Total \$10.00
Fileg Atomy () * Jack N Stone ()	Service Fees				^
Party Responsible for Fees * Georgia Defendant	Total Service Fees Convenience Fee Total Court Service Fees				\$1.00 \$1.00 \$1.00
Filer Type Default \$					Sub Total \$3.00
GALCULATE FEES					Grand Total \$13.00
← SERVICE CONTACTS SAVE AND EXIT					SUMMARY →

Figure 7.79 – 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· ⊕·	■• ▲ monorementation
Documents Case Parties Filings	Service Fees Summary				
Filing Code	Client Ref #	Filing Description			Actions
Statement w/ special behavior					/ 1
Details Optional Services Communicati	ion				Harberate
Filing Type 🔶		Pling Code +			
eFile Only		Statement w' special behavior - \$10			•
Filing Description			Client Reference Number		
Comments to Court					
					1.
					GO TO OPTIONAL SERVICES
					do to or none adviced
Peng on build of ASSOCIATED PARTIES					
Upload Documents*					
Component	Name	Actions	Description	Security	
Leed Document	test (1).pdf		Description 🛛 test (1).pdf	Select	
		AUTO REDACT	10.00 m		
				li li	
Attachments		ADD DOCUMENTS			
l					
					GADO FILING
← PARTES SAVE AND EXT					SKIP TO FEES + + SERVICE +

Figure 7.80 – 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	\rightarrow	
plit Fee Service	\$10	*	
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 orizontal scrolling	to trigger	→	
laceholder Service 3		→	
laceholder Service 4		→	
OGA Decline Error	\$280	→	
roken Fee	\$10	→	
er Page Fee No Multiplier		→	

Figure 7.81 – 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

to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

9. Click

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



- 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.

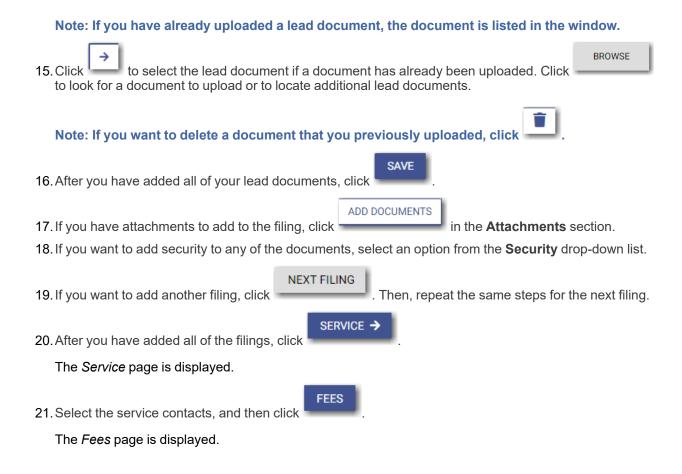
Upload Docum	ients*			
Component	Name	Actions	Description	Security
Lead Document		ADD DOCUMENTS	This document is required.	
Attachments		ADD DOCUMENTS		

Figure 7.83 – 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	(TIFF TIF) WordPerfect File (WPI) Word 2007 File (DO	CX) Word 97/XF	P File (DOC) Port	able

Figure 7.84 – Select document(s) for Lead Document Window



≡ 🐝 Fees - Draft # 9103 🚯 •			
Documents Case Parties Filings Se	ervice	Fees	Su
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 🚺 *			
Select			¢
Filing Attorney is Required.			
Party Responsible for Fees *			
Select	•	SEARCH	
Party Responsible for Fees is Required.			
Filer Type			
Select			¢
	📰 c/	ALCULATE FEE	S
SAVE AND EXIT			

Figure 7.85 – 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 🛈 -	0 ∗ ⊕∗ Ⅲ ·	
Documents Case Parties Filings Service Fees	Summary	
Estate 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
Filing Atomy 🔮 * Perry Mason ÷	Service Fees	^
Party Responsible for Fees * Jerry Defendant SEARCH	Total Service Fees Convenience Fee Total Court Service Fees	\$1.00 \$1.00 \$1.00
Filer Type Default ¢		Sub Total \$3.00
	1	Grand Total \$13.00
← SERVICE CONTACTS SAVE AND EXIT		SUMMARY →

Figure 7.86 – 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: You must create a payment account before you can complete your filing.

≡ 🐝 Fees - Draft # 6703 0 -	? -	.	•	1 million - 100 -
Documents Case Parties Filings Service Fees Summary				
Payment Account *				
Mary Ann's Waiver				
Party Responsible for Fees *				
Select Select Select				
Party Responsible for Fees is Required.				
Fler Type Select				
Concern •				
Le Le				
← SERVICE CONTACTS SAVE AND EXIT				

Figure 7.87 – Fees Page

Note: While you are entering a case filing, click



to view the case number or draft number.

To enter the payment information for your filing:

- 1. Select the payment account from the Payment Account drop-down list.
- 2. 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 Res	ponsible For Fee	S			
First Name	Last Name	Entity	Party Type Select	¢ FILTER	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 7.88 – 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.

- 3. Select the filer type from the Filer Type drop-down list.
 - CALCULATE FEES

4. Click

The fees for the filing are displayed.

≡ 🐝 Fees - Draft # 9274 👔 -		?-	. -	 -	2 management of the second sec
Documents Case Parties Filings Service Fees	Summary				
Payment Account *					
My Credit Card ¢					
Party Responsible for Fees *	\$ Optional Service Fees				^
Joseph Defendant	Certified Copies (\$5.00 x 2)				\$10.00
	Priority Processing (\$5.00 x 2)				\$10.00
Filer Type Default					Sub Total \$20.00
	Service Fees				^
	Total Service Fees				\$1.00
	Convenience Fee				\$1.00
	Total Court Service Fees				\$1.00
					Sub Total \$3.00
					Grand Total \$23.00
← SERVICE CONTACTS SAVE AND EXIT					

Figure 7.89 – 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.

= 🌾 EFILE QA 01 Fees - Draft # 250 💿 -			8-	.	 -	.
Documents Case Parties Filings Service	Fees Summary					
Pro se-fees						
Payment Account *	🖂 Mai	Service Fees				^
Pro Se CC	٠					
	Total Mail	Service Fees				\$6.00
Party Responsible for Fees * Harry Smith	ARCH					Subtotal \$6.00
Thany Smith	akon					
Filer Type	📥 Serv	ice Fees				^
Default	÷					
	Total Serv					\$1.00
	Convenier Total Cour	ice Fee t Service Fees				\$1.00 \$1.00
🖬 ca	ULATE FEES	t del vice rees				Subtotal \$3.00
						Subtotal \$3.00
						Grand Total \$9.00
						Grand Total \$9.00
← SERVICE CONTACTS SAVE AND EXIT						SUMMARY ->



5. Review the filing fees, and then click

SUMMARY ->

Entering Payment Information for Per-Page Optional Service Fee

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

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

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

To enter the payment information for your filing:

- 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.

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

Figure 7.91 – 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 F	Responsible 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 N	lext			2 Result(s) Page 1	of 1
				CANCEL SAV	Έ

Figure 7.92 – Select Party Responsible For Fees Window

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

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

9. Click

The fees for the filing are displayed.

≡ 🐝 Fees - Draft # 9254 🔞 -	0 - ⊕-	
Documents Case Parties Filings Service Fees	Summary	
Payment Account 🛊		
My Credit Card 🔹	\$ Optional Service Fees	^
Party Responsible for Fees * Harry Smith SEARCH	Per Page Fee Service (\$8.50 x 3) Priority Processing (\$5.00 x 1)	\$25.50 \$5.00
Filer Type Default		Sub Total \$30.50
	Service Fees Total Service Fees Total Court Service Fees	\$1.00 \$2.00 \$1.00 Sub Total \$4.00
		Grand Total \$34.50
← SERVICE CONTACTS SAVE AND EXIT		SUMMARY →

Figure 7.93 – 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 7.94 – 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 7.95 – 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 7.96 – 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 7.97 – 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 7.98 – 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.

The share a regime is a	Summery-Draft # 6703 nents Case Parties Filings Service Fees	s Summary			⊙ - ⊕- ⊞- 1
add control in the second s	ubmission Agreements				
Act Normal	I agree that this filing is in compliance with the Rules for E-Filing				
And Mathematication And Mathemathematication And Mathematica	You must accept the Submission Agreements.				1 Amounts
ABC A					
max m	Case				
main in the partie In the	acation	Category		Type	
Taking with the set of				Negligence	Filings
and generation of the form of		Carage Anosh			Service
and the set of t	Parties				V / Fees
Imposed maxima	burt 2				
mig mig mig mig mig mig file mig mig mig mig interrain mig mig mig mig interrain mig mig mig mig mig interrain mig mig mig mig mig mig interrain mig mig mig mig mig mig mig interrain mig					SOBMIT
Maging Marging Margin	Filings				/
affine of the image A characterize image image image image <td>3-</td> <td></td> <td></td> <td></td> <td></td>	3-				
Starb Ling Norm Norm Norm Norm Starb Norm Norm Norm Norm	Filing Type	Filing Code	Client Ruf #	Filing Description	
Lad Sound Wat Na def (S) Oppid Intraction	ehile and Serve	Acknowledgement			
Image Image Service Service Image Service The Stath Instance Service Service Service	Component	Document Name	Description	Security	
Opped Immediated Series Series Pass Series Series Pass Series Series			test.pdf	Confidential (G)	
Service					
Image: Contract of the second seco					
Parts main Parts should have been been been been been been been be		Lg.			
Parts of the method tarve and tarve and the method tarv					
Full Softh Same Method Same Sees Same Method Same State Method Same Same Method Same Sees Same Method Same Same Method Same Same Method Same					Hide of
pate semigration account on the fast of t	JANK I				
Auculation in the field and a set of the fiel	Patte Smith	Service Method: Eserve			
ees					
Cub Cub <td></td> <td></td> <td></td> <td></td> <td></td>					
te us server state tege server					
top Admin Naker Teal 10.00 Weiver Steleted Local Data L	Fees				/
لهم بداده ۲۵۰۰ ۲۵۰۰ ۲۵۰۰ ۲۵۰۰ ۲۵۰۰ ۲۵۰۰ ۲۵۰۰ ۲۵۰	Teyment Account				
Waiver Selected	Mary Ann's Waiver				
Waiver Selected					
ent of the second se					Total \$0.00
					Walver Selected
					BACK TO TOP
	FTTS SAVE AND EXIT				



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 7.100 – 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.

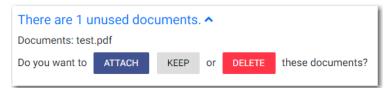


Figure 7.101 – Unused Documents Message

- 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 7.102 – 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 ->



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.

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

START FILING

The Start Filing page is displayed.

EFILE QA 01 Start Filing	? -	.	 -	.
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loato * Select \$				
Location is Required.				
← DASHBOARD				
2				
				D Help

Figure 8.1 – 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	⊙ • ⊕• Ⅲ• ≜
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
← DASHBOARD	
6	
	() Help
Figure 9.2 Start Filing Dags with Case Dags Dis	

Figure 8.2 – 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 •	? -	.	 -	A
Cocuments Case Parties Filings Service Fees Summary				
Chang 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 8.3 – 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 🕕	? -	•-	 -	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 8.4 – 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
 Image: A start of the start of	redactthis.pdf. Number of items
	redacted: 8

Figure 8.5 – Example of a Message for a Completed Redaction

CASE INFORMATION · 7. Click

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	

FILINGS ->

SERVICE ->

FFFS

SUMMARY ->



- 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.

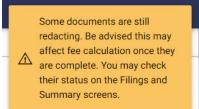


Figure 8.7 – Example of a Message with Redaction in Progress

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 8.8 – 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 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 8.9 – Delete Annotation? Dialog Box

3. Click Delete to delete the specified redaction.

Working with an Existing Redaction

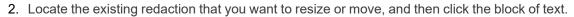
You can resize or move an existing redaction in the Redaction Editor (Tyler Content Manager window).

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).

106

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.
↓	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.
)	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 8.10 – 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.

9 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



EFILE QA 01 Filing History					? -	.	 -	£ means any game on -
Filing History Filter	FILING HISTORY FILI	ING DRAFTS						18 Result(s) Page 1 of 1
Status	Case # CC-	-20-2697						Image:
All Statuses	Envelope # 212360 Submitt	ted 09/03/2020 12:11 PM by Pro Se						
Accepted Cancelled	Filing Status	Filing Code	Filing Type	Filing Description			Client Ref #	
Cancelled Receipted	Accepted	Acknowledgement	eFile Only					
 Served 	· · · · · · · · · · · · · · · · · · ·							
 Returned 	Envelope #	210580						
 Submitted Submitting 		ted 08/27/2020 3:15 PM by Pro Se						
O submitting	Envelope # 210300 Submit	ee 00/27/2020 3.13 FM by 110 Se						
Location	Filing Status	Filing Code	Filing Type	Filing Description			Client Ref #	
Any Location +	Submitted	Application	eFile Only					■
Case / Envelope Number	Envirolance #	010570						
Case Number	Envelope # 210579 Submitt	Led 08/27/2020 3:13 PM by Pro Se						
Envelope Number								
Date Range	Filing Status	Filing Code	Filing Type	Filing Description			Client Ref #	8
	Submitted	Acknowledgement	eFile Only					
Anytime Last Month								
O Last Week	Case # CC-	20-1971						🖻 🗈 😫
🔿 Last Two Days	Envelope # 209496 Submitt	ted 08/26/2020 4:57 PM by Pro Se						
○ Today								
O Pick a Custom Range	Filing Status	Filing Code	Filing Type	Filing Description			Client Ref #	
From Date	Submitted	Affidavit	eFile Only					8
To Date								
Envelope # 209495								
RESET	Envelope # 209495 Submit	ted 08/26/2020 4:55 PM by Pro Se						
	Filing Status	Filing Code	Filing Type	Filing Description			Client Ref #	
	Submitted	Abstract Of Judgment	eFile Only					Ø Help

Figure 9.1 – Example of a Filing History Page

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

2	Click	CASE INFORMATION → to enter case information, or click		SKIP TO FILINGS $\rightarrow \rightarrow$ if you want to
2.	-	ectly to the <i>Filings</i> page.		in you want to
			ectly to the <i>Filings</i> page, the case . The ability to add a new party to	e and party information from the o an existing case is configurable.
	lf you	r system is configured		is displayed on the <i>Parties</i> page.
3.	On the	e <i>Filings</i> page, select the	filing type from the Filing Type dro	p-down list.
4.	Select	t the filing code from the I	Filing Code drop-down list.	
5.	Туре а	a description in the Filing	Description field.	

- 6. Type a client reference number in the **Client Reference Number** field.
- 7. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.

GO TO OPTIONAL SERVICES

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

The **Optional Services** tab is displayed.

9. To select the applicable optional services, click

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

÷

Note: If you decide that you do not want to use an optional service that you have selected, click GO TO COMMUNICATION 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 1
							CANCEL SAVE

Figure 9.2 – 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.

ADD DOCUMENTS

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

Figure 9.3 – Upload Documents Pane

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

Attachments

Select document(s) for Lead Document ×
Not Colorted
Not Selected Selected
Academic_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 9.4 – Select document(s) for Lead Document Window
17. 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
SAVE
18. After you have added all of your lead documents, click
ADD DOCUMENTS
19. If you have attachments to add to the filing, click in the Attachments section.
20. If you want to add security to any of the documents, select an option from the Security drop-down list
21. If you want to add another filing, click . 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 Service page, add service contacts if applicable. Then, click
24. On the <i>Fees</i> page, select the payment account from the Payment Account drop-down list.
25. Select the party responsible for fees from the Party Responsible for Fees drop-down list.
Note: If there are no fees associated with your filing, you may not be required to make a
selection in the Party Responsible for Fees field.
26. Select the filer type from the Filer Type drop-down list.
27. Click if you want to view the fee total.
28. Click .
29. Review the summary. If applicable, select the Submission Agreements check box.

SUBMIT

30. 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.

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 9.5 – 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 *	
Location is Required.	
Case number format is default.	
Case Number \star	
Case Number is Required.	
	CANCEL SEARCH

Figure 9.6 – 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			 -	
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



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

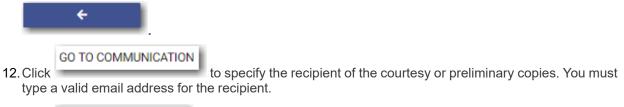
The **Optional Services** tab is displayed.

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.

⇒

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.

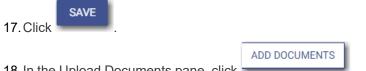
The Associate Parties to this Filing window is displayed.

Associate Parties to t	his 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 9.8 – 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.



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

Figure 9.9 – 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				
Supported File Types: TIFF Files	(TIFF TIF) WordPerfect File (WPI	D) Word 2007 File (DOCX) Word	97/XP File (DOC) Portab	le
	ment (XML) Windows Media File			

Figure 9.10 – Select document(s) for Lead Document Window

19. 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
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 Attachments section.
22. If you want to add security to any of the documents, select an option from the Security drop-down list.
23. If you want to add another filing, click . 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 party responsible for fees from the Party Responsible for Fees drop-down list.

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

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

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

30. Click

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

32. When you are satisfied with your filing, click

Filing into an Existing Case from the 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 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 *	÷
Location is Required.	
Search for a Case by Case Number O Party Name	Q
Case number format is default.	· ·
Case Number 🗚	
Case Number is Required.	
	CANCEL SEARCH

Figure 9.11 – 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

to

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

Figure 9.12 – File into Existing Case Window—Excludes Party Name Option

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



SEARCH

case to complete your search.

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

≡ 🐝 eFile Case Search			? - ()- III-	▲ International Content Content
Location: OFS QA 2014 - Court at Law Case Num	per: CC-19-1245				
Case # CC-19-1245					r 🖅
Location OFS QA 2014 - Court at Law	Case Category Civil	Case Type Landford / Tenant			
← DASHBOARD					REFINE SEARCH



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.

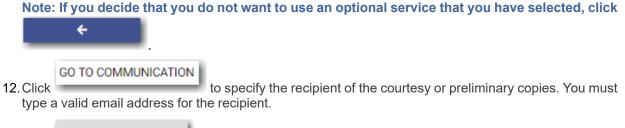
ADD PARTY

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

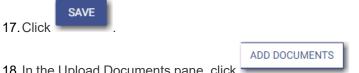
to associate parties with the filing.

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	l of 1
						CANCEL SAV	Æ

Figure 9.14 – 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.



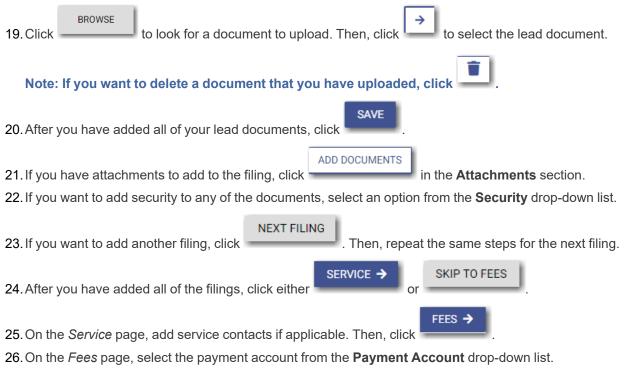
Component Name Actions Description Security Lead Document	Upload Docum	ients*			
ADD DOCUMENTS This document is required.	Component	Name	Actions	Description	Security
Attachments ADD DOCUMENTS	Lead Document		ADD DOCUMENTS	This document is required.	
	Attachments		ADD DOCUMENTS		

Figure 9.15 – Upload Documents Pane

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

lot Selected		Selected			
est.pdf	→				
Academic_Calendar	→ 🗊				
	Drag files here or	BROWSE			
Aaximum Filesize: 50.00 MB					
Supported File Types: TIFF Files (TIFF	TIF) WordPerfect File (WPD) Word 2007 File (DOC	() Word 97/XP File (DO	C) Portable	
Ocument File (PDF) XML Document	,	, , ,		o) i ortable	

Figure 9.16 – Select document(s) for Lead Document Window



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

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

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

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

30. Click

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

32. When you are satisfied with your filing, click

Filing into 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.

File into Existing Case	>
Location *	÷
Location is Required.	
Search for a Case by Case Number O Party Name	X
Case number format is default.	•
Case Number 🕊	
Case Number is Required.	
	CANCEL SEARCH

Figure 9.17 – 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 * Select Location is Required. Case number format is default.	Q
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.

\$ SE	A	R	가	ł

4. Click

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

≡ 🐝 eRile Case Search	? -	. -	 -	A MORET LEGENARIA (1994 -
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 sys required to manually input the case information. Any additional filings on this case will not require the manual data entry.	tem. You a	re still able	to file into t	this case, but you will first be
			I DOM	NT SEE MY CASE REFINE SEARCH

Figure 9.19 – 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 subsequ	ent filing at the following location. Please be sure you have	filtered by case number at the proper location or your filing could l	be delayed by improper numbering.
Location OFS Non-Integrated	Case Number CC-145333	Cases Found 0	
BACK TO RESULTS			I UNDERSTAND, CONTINUE

Figure 9.20 – 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 🚯 -	⊘ - ⊕- Ⅲ - ≜
Documents Case Parties Filings Service Fees Summary	
Cate Number # CC-145333	
Location OFS Non-Integrated	Case Category * Select Case Category is Required.
Case Type * Select	Case Sub Type Select
Case Type is Required.	
← UPLOAD DOCUMENTS SAVE AND EXIT	PARTIES →



- 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

SUBMIT

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.

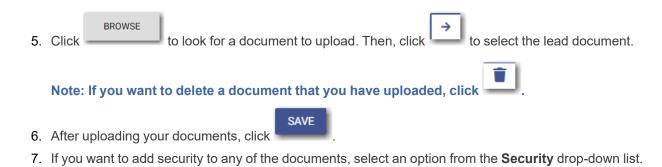
ADD DOCUMENTS

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

Figure 9.22 – Upload Documents Pane

elect document(s) for Lead Docume	nt	×
Not Selected test.pdf	Selected	
Academic_Calendar		
Drag files here or	BROWSE	
Maximum Filesize: 50.00 MB Supported File Types: TIFF Files (TIFF TIF) WordPerfect File (WPD) Document File (PDF) XML Document (XML) Windows Media File (t		j
	CANCEL SAVE	
gure 9.23 – Select Document(s) for Lead Document Window	N

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



8. Click SERVICE →

to save your entries and to continue.

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

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.

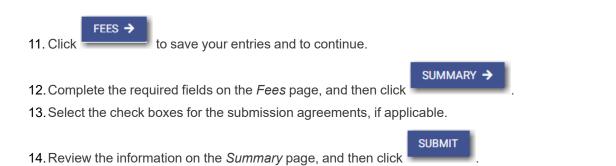
Mail	1
Certified Mail	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Mail	
Eserve	

Figure 9.24 – 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.

≡ 🐝 Service - Draft # 6703 🛈 -		0 - ⊕- Ⅲ-	A monetricter registeric.com
Documents Case Parties Filings Service Fees	Summary		
Add Service Contacts:	NEW CONTACT		
Parties	Service Contacts Serve all		Show All
Type: Name: Defendant Georgia Defendant	Serve Service Method Name Email/Mail		Count: 0
	No service contacts		
Type: Name: Plaintiff Peter Plaintiff	Serve Service Method Name Email/Mail		Count: 1
Serve all party contacts	Click to expand		
← FILINGS SAVE AND EXIT			FEES >





10 Service Contacts

Topics covered in this chapter

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

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

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

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

Adding a New Service Contact

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

To add a new service contact to your contacts list:

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

The Service Contacts page is displayed.

■			0 -	
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.cor	m	
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 1

Figure 10.1 – Service Contacts Page



Additional fields are displayed.

			/ ·
You must provide either an email address or a physical address.			
Add To My List	Add to Public List		
First Name #	Middle Name		Last Nome *
First Name is Required.			Last Name is Required.
Email *	Phone Number		
Email Is Required.			
Country United States •			
United States Address Line 1 *		Address Line 2	
Aptress Life 1 •		ADDRESS LINE Z	
Address Line 1 is Required.			
City *	State		Zip Code *
	Select	\$	
City is Required.	State is Required.		Zip Code is Required.
			CANCEL SAVE

Figure 10.2 – Service Contacts – Additional Fields

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

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

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

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

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

The default selection is United States.

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

13. After you have entered the required information, click

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



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

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



1. On the Service page, click

The My Service Contacts window is displayed.

My Se	ervice Contacts	Associated Parties		
First Name		Last Name	Email	ER RESET
	Test Contact Susie Potter Pro Se Patte Smith Russ Smith		testcontact@gmail.com susiep@gmail.com @gmail.com patte.smith@gmail.com russ.smith@gmail.com	
First	Previous 1	Next Last	E	Result(s) Page 1 of 1
			CANCEL ASSOC	CIATED PARTIES

Figure 10.3 – My 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.

Select o	one or more part	ies to associ	ate with the serv	vice contacts.		
	lect Parties		•			
ies						
	ervice Contacts:					

Figure 10.4 – 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	٩.
Certified Mail	
Mail	
Eserve	

Figure 10.5 – 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

MY 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.

FILTER

ocuments Case	Parties Filings Service	Fees Summary				
d Service Contacts:						
FROM MY SERVICE C	ONTACT LIST	ADD NEW CONTACT				
arties		Service Cont	acts Serve all			Show
^{ype:} efendant	Name: Johnny Defendant	Serve	Service Method	Name	Email/Mail	Count
Serve all party contacts		~	Eserve	+ Russ Smith	russ.smith@gmail.com	1
^{ype:} laintiff	Name: Melanie Plaintiff	Serve	Service Method	Name	Email/Mail	Count
Serve all party contacts		\checkmark	Eserve	\$ Susie Potter	susiep@gmail.com	1

Figure 10.6 – 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 the public list to a filing:

1. On the Service page, click

FROM PUBLIC LIST

The Public Service Contacts window is displayed.

Public Serv	rice Contacts	Associated Parties			
Fill in at lea	ist one field and click FI	LTER to display public service	contacts.		
First Name	Last Name	Email	Firm	FILTER	RESET
			CANCEL	ASSOCIATED	PARTIES

Figure 10.7 – Public Service Contacts Window

2. If you want to filter the list, 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.

Public	c Service Contacts Associated Parties				
The m	maximum of 100 public service contacts were returned				
First Name a	e Last Name Email	Firm FILTER RESET			
		dbbqnmp.qjnijdqt@tylertech.com ssncpywh.hoopjatu@tylertech.com			
		rvbmornb.tawnxbpw@tylertech.com ryjagryh_jvezoxrv@tylertech.com			
	ydfkwmsc.update zadxmwvs.update y	ydfkwmsc.zadxmwvs@tylertech.com yfxbhtia.gejdvkgn@tylertech.com			
	yvemzhts.update lispdguk.update r	rjrxykyo.ykwwddld@tylertech.com			
		cclyrpby.bvfbzkcd@tylertech.com ricpsjbf.whlrcqyl@tylertech.com			
	zqwlczsm.update xwoymgnm.update z	rqwlczsm.xwoymgnm@tylertech.com			
First	Previous 1 2 3 4 5 6 7 Next	Last 100 Result(s) Page 7 of 7			
		CANCEL ASSOCIATED PARTIES			

Figure 10.8 – 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 to the filing.
- 5. After you have selected the contacts for your filing, click

The Associated Parties window is displayed.

Publ	ic Service Contacts	Associated Parties			
Sele	ect one or more parties to	associate with the service of	ontacts.		
Parties	Select Parties	*			
Selecte	ed Service Contacts:				
\checkmark	xyjaqryh jvezoxrv		xyjaqryh.jvezoxrv@tylertech.	.com	
PUB	BLIC SERVICE CONTACTS			CANCEL	SAVE

Figure 10.9 – Sample Associated Parties Window

6. 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

ESO-FS-200-4494 v.11

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

Figure 10.10 – 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
```

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.

ocuments Case	Parties Filings Service Fees	Summary				
Service Contacts:	TACT LIST	NEW CONTACT				
rties		Service Cont	acts Serve all			Show
	Name: Johnny Defendant	Serve	Service Method	Name	Email/Mail	Count
Serve all party contacts		v	Eserve +	Russ Smith	russ.smith@gmail.com	1
	Name: Melanie Plaintiff	Serve	Service Method	Name	Email/Mail	Count
Serve all party contacts		~	Eserve ¢	Susie Potter	susiep@gmail.com	1

Figure 10.11 – 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.

Parties Select Parties		Ŧ	
Add To My List	Add to Public List		
First Name *	Middle Name	Last N	Name *
First Name is Required.		Las	st Name is Required.
Email *	Phone Number		
Email is Required.			
Country United States	•		
Address Line 1		ddress Line 2	
City	State	Zip Cc	ode
	Select	\$	

Figure 10.12 – Add Service Contact Window

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

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

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

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

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

The default selection is United States.

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

11. Type the ZIP code in the **Zip Code** field. 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 10.13 – 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 10.14 – 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.

ocuments Case	Parties Filings Service	Fees Summary				
d Service Contacts:	CONTACT LIST	ADD NEW CONTACT	7			
arties		Service Co	ntacts Serve all			Show
_{ype:} Jefendant	Name: Johnny Defendant	Serve	Service Method	Name	Email/Mail	Count
Serve all party contacts		×	Eserve	€ Russ Smith	russ.smith@gmail.com	1
_{ype:} Naintiff	Name: Melanie Plaintiff	Serve	Service Method	Name	Email/Mail	Coun
Serve all party contacts		\checkmark	Eserve	Susie Potter	susiep@gmail.com	1

Figure 10.15 – 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 My Service Contacts.

The Service Contacts page is displayed.

E 🐝 eFile Service Contacts			? ~ ⊕-	
st Name	Last Name	Email Address	FILTER RESET	ADD SERVICE CONTACT
First Name	Last Name	Email Address		Actions
Test	Contact	testcontact@gmail.com	n	1
Susie 🔓	Potter	susiep@gmail.com		1
oro	Se	gmail.t	com	1
Patte	Smith	patte.smith@gmail.com	n	1
luss	Smith	russ.smith@gmail.com		1
ōonia	Smith	tsmith@gmail.com		1
Previous 1 Next				6 Results Page 1 d

Figure 10.16 – 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.

3. Update the information, as applicable.



May 2021

4. When you are done with your updates, click

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 My Service Contacts.

The Service Contacts page is displayed.

E Service Contacts			0 -	
irst Name	Last Name	Email Address	FILTER RESET	ADD SERVICE CONTACT
First Name	Last Name	Email Address		Actions
Test	Contact	testcontact@gmail.co	m	1
Susie 🔓	Potter	susiep@gmail.com		1
Pro	Se	gmai	l.com	1
Patte	Smith	patte.smith@gmail.co	m	1
Russ	Smith	russ.smith@gmail.cor	n	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 10.18 – 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 10.19 – 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.

≡ 🐝 eFile Filing History					0 ∙ ⊕• Ⅲ•	Encountry_consumations_cons •
Filing History Filter	FILING HISTORY FILING	G DRAFTS				2 Result(s) Page 1 of 1
Status	Envelope # 1					
All Statuses Accepted Cancelled Receipted	Envelope # 165244 Submitted Filing Status Submitted	01/28/2020 3:53 PM by Pro Se Filing Code Acquittal	Filing Type eFile Only	Filing Description	Client Ref #	ß
Receipted Served Returned Submitted Submitting	Envelope # 1 Envelope # 165149 Submitted					
Location	Filing Status Reviewed	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description	Client Ref #	
Any Location +	Previous 1 Next					2 Result(s) Page 1 of 1
Case Number / Envelope Number						
Case Number						
Envelope Number						
Date Range						D
Anytime Last Month Last Week Last Twee Days Today Pick a Custom Range From Date To Date RESET FLUER						

Figure 10.20 – Filing History Page

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

The service contacts for the case are displayed.



SAVE

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

Figure 10.21 – Update Service Contact Window

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

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 My Service Contacts.

The Service Contacts page is displayed.

E 🀝 eFile Service Contacts			0-	
First Name	Last Name	Email Address	FILTER RESET	ADD SERVICE CONTACT
First Name	Last Name	Email Address		Actions
Test	Contact	testcontact@gmail.co	om	1
Susie 🔓	Potter	susiep@gmail.com		1
Pro	Se	gma	il.com	1
Patte	Smith	patte.smith@gmail.co	om	1
Russ	Smith	russ.smith@gmail.co	m	1
Tonia	Smith	tsmith@gmail.com		1
Previous 1 Next				6 Results Page 1 of

Figure 10.22 – 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.

11 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			⋳ - ⊕-	🛛 • 🔺 TROBETTA COLUMNATION •
Filter Type My Templates ¢	Name	FILTER RESET		ADD TEMPLATE
Favorite	Name	Туре		Actions
*	Tyler Group	New Case		
☆	My Name change template	New Case		
☆	Existing Case Template	Existing Case		A :
☆	Template #5	New Case		۱
☆	Thursday Template	New Case		1
	Pro Se Template	New Case		1
습	Thursday Template #2	New Case		Image:
	Current Case Template #2	Existing Case		// E
☆	Template #3	New Case		

Figure 11.1 – Templates Page



A pane is displayed.

Favorite	Name	Туре			Actions
☆		New Case			🖻 🖊 🗄
Favorite	Nam	me *	New Case O Existing Case		
	Na	ame is Required.			
				CANCEL	EDIT DETAILS ->

Figure 11.2 – 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 11.3 – 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				0-	.	 -	🛓 полотиско промиском •
ilter Type My Templates	Name		FILTER RESET				
Favorite		Name	Туре				Actions
*		Tyler Group	New Case				۱
☆		My Name change template	New Case				🖻 🖍 🗄
습		Existing Case Template	Existing Case				<i>i</i>
습		Template #5	New Case				۱
습		Thursday Template	New Case				۱
습		Pro Se Template	New Case				1
☆		Thursday Template #2	New Case				۱
☆		Current Case Template #2	Existing Case				Ø :
☆		Template #3	New Case				۲

Figure 11.4 – Templates Page

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

The template name is displayed in a separate pane.

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

EDIT DETAILS →

pages. Then click

3.

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

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			Ø* ⊕* III.* ≜naaraangaaa *
My Templates 🗢	Name	FILTER RESET	ADD TEMPLATE
Favorite	Name	Туре	Actions
*	Tyler Group	New Case	
☆	My Name change template	New Case	
☆	Existing Case Template	Existing Case	
<u>ک</u>	Template #5	New Case	
<u>ک</u>	Thursday Template	New Case	
<u>ک</u>	Pro Se Template	New Case	
<u>ک</u>	Thursday Template #2	New Case	
<u>۵</u>	Current Case Template #2	Existing Case	
<u>አ</u>	Template #3	New Case	

Figure 11.5 – 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.

- 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.

144

= 🐝 eFile Filing History					Ø- ()~ 🎹~	A PROMETRIC OF THE PARTY - 1000 -
Filing History Filter	FILING HISTORY						2 Result(s) Page 1 of 1
Status		e # 165244 Submitted 01/28/2020 3:53 PM by Pro Se					
All Statuses Accepted Cancelled	Filing Status Submitted	Filing Code	Filing Type eFile Only	Filing Description		lient Ref #	8
Receipted Served Returned Submitted		e # 165149 Submitted 01/24/2020 9:22 AM by Pro Se					
O Submitting Location	Filing Status Reviewed	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description		lient Ref #	
Any Location \$	Previous 1	Next					2 Result(s) Page 1 of 1
Case Number / Envelope Number							
Case Number							
Envelope Number							
Date Range							D
Anyline Last Month Last Week Last Two Days Today From Date To Date							
To Date							

Figure 11.6 – Filing History Page

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		_
My Temp	lates	\$	FILTER RES	ET
Location/ You can u template	/Type/Category matche	es the case, each templat there are mismatches. Th atch, we attempt to create	nd Case Category to your templates. If the temp te section will be created on the draft. In templates are listed in best match order. If yo e the entire template, but your draft might not in	u select a
template	s documents of option	al services.		
Favorite	Name	ai services.	Template Matches On	Actions
	·		Template Matches On No matching case information @	Actions
Favorite	Name	late #2		Actions

Figure 11.7 – 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



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					? -	•		• mosern.com
^{ter Type} My Templates €	Name		FILTER	RESET				ADD TEMPLATE
Favorite	Name			Туре				Actions
*	Tyler Gr	oup		New Case				۱
<u></u>	My Nan	ne change template		New Case				۱
\$	Existing	Case Template		Existing Case				Ø
<u></u>	Templa	te #5		New Case				1
\$	Thursda	y Template		New Case				1
2	Pro Se	Femplate		New Case				1
5	Thursda	ay Template #2		New Case				1
\$	Current	Case Template #2		Existing Case				Ø :
<u>^</u>	Templa	te #3		New Case				۱

Figure 11.8 – Templates Page

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

A drop-down list is displayed.

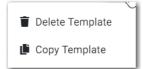


Figure 11.9 – More Options Drop-Down List

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.

SAVE

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

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

Deleting a Template

You can delete a template that you no longer need.

To delete an existing template:

1. On the Dashboard menu, click Templates.

The Templates page is displayed.

to

EDIT DETAILS ->

= 🐝 eFile Templates				Q-	⊕ - Ⅲ -	A monetro congenero. con •
Filter Type My Templates	Name \$		FILTER RESET			ADD TEMPLATE
Favorite		Name	Туре			Actions
*		Tyler Group	New Case			۱
☆		My Name change template	New Case			📂 🌶 🗄
☆		Existing Case Template	Existing Case			Ø.
☆		Template #5	New Case			
☆		Thursday Template	New Case			
☆		Pro Se Template	New Case			
☆		Thursday Template #2	New Case			
☆		Current Case Template #2	Existing Case			A :
☆		Template #3	New Case			

:

Figure 11.10 – Templates Page

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

A drop-down list is displayed.



Figure 11.11 – 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. Click or to delete the template, or click cancel to cancel the action.
If you clicked or , a confirmation message is displayed, and the template is deleted.

12 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.

					Ø- (⊕ - Ⅲ -	L montre consignation con-
Filing History Filter	FILING HISTORY FILING	DRAFTS					2 Result(s) Page 1 of 1
Status	Envelope # 1 Envelope # 165244 Submitted 0						
All Statuses	Envelope # 165244 Submitted 0	1/28/2020 3:53 PM by Pro Se					
O Accepted	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
O Cancelled	Submitted	Acquittal	eFile Only				8
O Receipted O Served	Envelope # 1	651/10					
O Returned							
O Submitted	Envelope # 165149 Submitted 0	1/24/2020 9:22 AM by Pro Se					
O Submitting	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
Location	Reviewed	Acknowledgement	eFile Only				
Any Location \$	Previous 1 Next						2 Result(s) Page 1 of 1
Case Number / Envelope Number							
Case Number							
Envelope Number							
Date Range							ß
 Anytime 							
O Last Month							
O Last Week O Last Two Days							
O Last Two Days O Today							
O Pick a Custom Range							
From Date							
To Date							
RESET							

FILTER

Figure 12.1 – 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.
- 4. Click , and then select **Copy Envelope**.



Figure 12.2 – More Options Drop-Down List

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

🚍 - 🤹 EFILE QA 01 Upload Documents - Draft # 602 - Case # CC-21-065 - Tom Mattisonv.Julia Rivers 🕕	? -	.	 -	L man
Documents Case Parties Filings Service Fees Summary				
This is a copy of envelope 251036. Please verify all information before submitting.				
Drag files here or BROWSE				
Maximum Filesia: 50.00 MB				
Supported File Types: TIFF Files (TIFF TIF) WordParfect 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		SKI	IP TO FILING	S → → CASE INFORMATION →

Figure 12.3 – Sample Upload Documents Page for a Copied Envelope

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

6. After you have verified the envelope, click

Submission Agreements					
Case				Agreements	
This is a copy of envelope 703945. Please verify all in	formation before submitting.			Case	
Location OFS MockCMS	Category Civil		Tiee Name Change	Parties Filings	
Parties				Dow All Fees	
Filings				SUBMIT	
Pling type eFile Only	Hing Code Acknowledgement	Claure Half #	Filing Decorption		
Component Lead Document Domitiaal Version Original	Decument Name Sett.pdf	Countries Acknowledgement	Security		
Service Caute 0 None				,	
Fees Propriet Account New Account	Pilling Attorney firm attorney	where the space states to trace α is b	nie 190 Default	·	
\$ Service Fees				^	
Total Service Fees Convenience Fee Total Court Service Fees				81.00 81.00 81.00 Sub Total 53.00	
				Grand Total \$3.00 BACK TO TOP	

SUBMIT

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.

■ Serile Filing History					0 ∙ ⊕• Ⅲ•	L PROBERT, COLONG, CON-
Filing History Filter	FILING HISTORY FILIN	G DRAFTS				2 Result(s) Page 1
Status	Envelope #	165244				
	Envelope # 165244 Submitted	01/28/2020 3:53 PM by Pro Se				
 All Statuses 						
O Accepted	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
O Cancelled	Submitted	Acquittal	eFile Only			×
Receipted						
) Served	Envelope # 7	165149				🗈 💷 🗄
O Returned		01/24/2020 9:22 AM by Pro Se				
O Submitted	Envelope # 105149 Subinitied	01/24/2020 9.22 AM by PI0 Se				
O Submitting	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Location	Reviewed	Acknowledgement	eFile Only	Thing Description		
Case Number / Envelope Number ase Number nvelope Number	_					
Date Range	_					D.
Anytime Last Month Last Week Last Two Days						
O Today O Pick a Custom Range						
From Date						
To Date						

Figure 12.5 – 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				PRINT CLOSE
Case Locate OFS MockCMS	Category Civil		nos Wrongful Death	
Parties _{Court 2}				Show All
Filings				
пиц туре eFile Cnly сълотны Слы 12/16/19 4:54 РМ	Filing Code Motions Datus Submitted	Clare for #	Filling Description	
Composed Lead Document Domitad Yation Original	Dosament Name test.pdf	Description	tannfy Confidential (T)	
Service				Hide al
marty ales weigligdig.com Status: Not Sent Associated Partice: Rore	Service Method: Eserve			
Fees Promote Acoust walver Over D	Party Responsible for Pare Phil Defendant Texastrose Registra	rier foe Default Tossenine Ansat S0.00	Tanantin D	
				Total \$0.00 Waiver Selected
				CLOSE

Figure 12.6 – 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.

E 🐝 eFile Filing History					0 ∙ ⊕• Ⅲ•	L PROSETTLE CONSUMPLY. CON-
Filing History Filter	FILING HISTORY FILIN	IG DRAFTS				2 Result(s) Page 1 d
	Envelope #	165244				
Status	Envelope # 165244 Submittee	101/28/2020 3:53 PM by Pro Se				
 All Statuses 						
O Accepted	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
O Cancelled	Submitted	Acquittal	eFile Only			×
O Receipted		, induction	or no only			6
O Served	Envelope #	165149				
C Returned						
O Submitted	Envelope # 165149 Submittee	I 01/24/2020 9:22 AM by Pro Se				
O Submitting	_					
ocation	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
location	Reviewed	Acknowledgement	eFile Only			2 Result(s) Page
Case Number / Envelope Number ase Number nvelope Number	_					
Date Range	_					D
Anytime						
C Last Month						
C Last Week						
🔾 Last Two Days						
🔾 Today						
Pick a Custom Range						
From Date						
To Date						

Figure 12.7 – 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 tuberine 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	^{Sacurty} 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 12.8 – 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.

E 🐝 eFile Filing History					0 ∙ ⊕• Ⅲ•	L PROSETTLE CONSUMPLY. CON-
Filing History Filter	FILING HISTORY FILIN	IG DRAFTS				2 Result(s) Page 1 d
	Envelope #	165244				
Status	Envelope # 165244 Submittee	101/28/2020 3:53 PM by Pro Se				
 All Statuses 						
O Accepted	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
O Cancelled	Submitted	Acquittal	eFile Only			×
O Receipted		, induction	or no only			6
O Served	Envelope #	165149				
C Returned						
O Submitted	Envelope # 165149 Submittee	I 01/24/2020 9:22 AM by Pro Se				
O Submitting	_					
ocation	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
location	Reviewed	Acknowledgement	eFile Only			2 Result(s) Page
Case Number / Envelope Number ase Number nvelope Number	_					
Date Range	_					D
Anytime						
C Last Month						
C Last Week						
🔾 Last Two Days						
🔾 Today						
Pick a Custom Range						
From Date						
To Date						

Figure 12.9 – 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 CLOS
Case				
Leaster OFS QA 2017	Canopry Civil		1 _{pp} Appeal	
Parties				Show All
Filings				
Fileg Type eFile Only Suleritud Date	Hing Code Abstract Of Judgment Base	Class 1 Suf # Bodiew Date	Filing Description Comments	
01/21/2021 11:13 AM	Accepted	01/21/2021 11:16 AM	Auto Review Accepted	
Companient Attachments Dovelload Version Original	Dournet Name Petition.pdf Court Copy	Description	ileanny Public (G)	
Component Lead Document Dovelaad Version	Document Nerw BlankTest.pdf	Description	Security Public (G)	
Original	Court Copy			
Service				Show All
Fees				
Payment Account Firm's CC Ode 10 000256195-0	Hing Atomy Abby Caminchael Terescon Necros Approved	Party Inseptemblie for Pean Naionni Vatsion Immedian Amazti \$20.00	Filer Type Auto Retview Transaction 10 260829	
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 Subtotal \$3.00
				Grand Total \$20.0
				CLOS

Figure 12.10 – 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.

E 🐝 eFile Filing History					0 ∙ ⊕• Ⅲ•	L PROSETTLE CONSUMPLY. CON-
Filing History Filter	FILING HISTORY FILIN	G DRAFTS				2 Result(s) Page 1 d
	Envelope #	165244				
Status	Envelope # 165244 Submittee	01/28/2020 3:53 PM by Pro Se				
 All Statuses 						
O Accepted	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
O Cancelled	Submitted	Acquittal	eFile Only			×
O Receipted		, toquittai	or no only			6
O Served	Envelope #	165149				
C Returned						
O Submitted	Envelope # 165149 Submittee	01/24/2020 9:22 AM by Pro Se				
O Submitting	_					
ocation	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
location	Reviewed	Acknowledgement	eFile Only			2 Result(s) Page
Case Number / Envelope Number ase Number nvelope Number	_					
Date Range	_					D
Anytime						
C Last Month						
C Last Week						
🔾 Last Two Days						
🔾 Today						
Pick a Custom Range						
From Date						
To Date						

Figure 12.11 – 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		Type 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 12.12 – 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				8- •••	· III-	• monernum regeneration - cone -
Filing Drafts Filter	FILING HISTORY FILING DRAFTS					66 Results Page 1 of 4
Location	Draft # 6666 Started 10/24/19 3.31 PM by Pro Se					
Any Location +	Filing Status Filing Code		Film Receiving		Client Ref #	
Case Number / Draft Number	Piling Status Filing Code Draft Acknowledgement	Filing Type eFile Only	Filing Description Acknowledgement		Client Ref #	
Case Number	Draft # 6659 Draft # 6659 Started 10/23/19 4:56 PM by Pro Se					
Draft Number	Draft # 6658					
Date Range	Draft # 6658 Started 10/23/19 4:21 PM by unknown					
Anytime Last Month	Draft # 5593					
O Last Week O Last Two Days	Draft # 5593 Started 10/11/19 8:14 AM by Pro Se					
O Today	Draft # 5592					
O Pick a Custom Range	Draft # 5592 Started 10/10/19 9:13 PM by Pro Se					
From Date	Draft # 5587 Started 10/10/19 1:59 PM by Pro Se					
To Date	Filing Status Filing Code Draft	Filing Type eFile Only	Filing Description		Client Ref #	
RESET FILTER	Draft # 5560					
	Draft # 5560 Started 10/8/19 1:49 PM by Pro Se					
	Draft # 5557					

Figure 12.13 – 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.

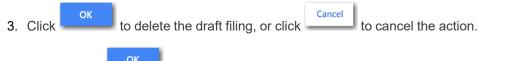
SUBMIT

= 🐝 eFile Filing Drafts					8 -	⊕ - Ⅲ-	£ monerocorregnos.com -
Filing Drafts Filter	FILING HISTORY FILING DRAFTS						66 Results Page 1 of 4
Location	Draft # 6666 Draft # 6666 Started 10/24/19 3:31 PM by Pro	Se					
Any Location 🗢							
Case Number / Draft Number	Filing Status Filing Co Draft Ackno	de owledgement	Filing Type eFile Only	Filing Description Acknowledgement		Client Ref #	
Case Number	Draft # 6659						
Draft Number	Draft # 6659 Started 10/23/19 4:56 PM by Pro	Se					
Date Range	Draft # 6658 Started 10/23/19 4:21 PM by unk	nown					
 Anytime Last Month 	Draft # 5593						
O Last Week	Draft # 5593 Started 10/11/19 8:14 AM by Pro	Se					
O Last Two Days O Today	Draft # 5592						▶ 🗐 🗄
O Pick a Custom Range	Draft # 5592 Started 10/10/19 9:13 PM by Pro	Se					
From Date	Draft # 5587						
	Draft # 5587 Started 10/10/19 1:59 PM by Pro	Se					
To Date	Filing Status Filing Co Draft	de	Filing Type eFile Only	Filing Description		Client Ref #	
RESET FILTER	Draft # 5560						
	Draft # 5560 Started 10/8/19 1:49 PM by Pro S	ie					
	Draft # 5557						▶ ┳ ±

Figure 12.14 – 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"?



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

Canceling a Filing

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

To cancel a filing:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.

≡ 🐝 eFile Filing History					0 - ⊕-	III • 1 maaraa ahayaana aha •
Filing History Filter	FILING HISTORY	FILING DRAFTS				2 Result(s) Page 1 of 1
Status		e # 165244				
 All Statuses 	Envelope # 165244 S	Submitted 01/28/2020 3:53 PM by Pro Se				
O Accepted	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
O Cancelled	Submitted	Acquittal	eFile Only			×
Receipted Served	Envolop	e # 165149				
O Returned						
O Submitted	Envelope # 165149 S	Submitted 01/24/2020 9:22 AM by Pro Se				
O Submitting	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Location	Reviewed	Acknowledgement	eFile Only			
Any Location +	Previous 1 N	lext				2 Result(s) Page 1 of 1
Case Number / Envelope Number						
Case Number						
Envelope Number						
Date Range						ß
 Anytime 						
O Last Month						
O Last Week O Last Two Days						
O Today						
O Pick a Custom Range						
From Date						
To Date						
RESET FILTER						

Figure 12.15 – 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.

3. Click .

The following warning message is displayed: Are you sure you want to cancel this filing?

4. Click to cancel the filing, or click to cancel the action.

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



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				9 -	.	 .	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	uae reaution				
Case Description RESET FILTER	Case # CC-19-438	Location OFS QA 2018	Case Description				
	Previous 1 Next		₿.				4 Results Page 1 of

Figure 13.1 – Sample Bookmarks Page

Creating a Bookmark for a Case

You can create a bookmark for a case from the *Filing History* page or the *Filing Drafts* page.

To create a bookmark for a case:

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				0-		 .	A **********************
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	0FS 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 RESET FILTER	Case # CC-19-438	Location OFS QA 2018	Case Description				
	Previous 1 Next		₿.				4 Results Page 1 of 1

Figure 13.2 – 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				8 -	.	 -	A
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 13.3 – 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



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 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.

BULK ADD FILINGS

when it is enabled on the Bulk

Dashboard

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

Ð	Dashboard
Q	Case Search
≣	Filing History
ø	Filing Drafts
≣	Bulk History
ø	Bulk Drafts
	Bookmarks
	Templates
	My Payment Accounts
8	My Service Contacts
0	My Information
\$	Account Settings
¢	Reports

Figure 14.1 – 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 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 draft filings.
- Access the *Bulk History* page to view a list of your bulk filings.
- Access the *Bulk Drafts* page to view a list of your bulk draft filings.
- Access the *Bookmarks* page to view a list of cases that you have bookmarked for quick access.
- Access the *Templates* page to locate an existing template and quickly begin a new case filing.
- Access the Payment Accounts page to set up and manage payment accounts.
- Access the Service Contacts page to add and manage your service contacts list.
- View and update your profile information on the *My Information* page.
- Access the Account Settings page to change your password.
- Access the *Reports* page to generate reports for envelopes and filings that you submitted.

Bulk History

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

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

≡• 🤹 EFILE QA 01 Bulk H	istory				@ -	.	 -	▲ management of the -
Filing History Filter	FILING HISTORY FILING	DRAFTS BULK HISTORY BULK	DRAFTS					Filters Applied 1 Result(s) Page 1 of 1
Bulk Number / Name	Bulk # 137 - D	allas Cases						
Bulk Number	Bulk # 137 Started 04/15/2021 11:	32 AM by Pro Se						
Bulk Name	Envelope #	157600						
Status		1 04/15/2021 11:40 AM by Pro Se						
All Statuses Accepted	Location OFS QA 2017							
Cancelled Receipted Served Returned	Filing Status Submitted	Filing Code Acknowledgement	Filing Type EfileAndServe	Filing Description			Client Ref #	8
O Submitted O Submitting	Envelope #							
Location	Location	d 04/15/2021 11:40 AM by Pro Se						
Any Location	OFS QA 2017							
Case / Envelope Number	Filing Status Submitted	Filing Code Acknowledgement	Filing Type Efile	Filing Description			Client Ref #	×
Case Number								•
Envelope Number	Envelope #	157684						
Date Range	Envelope # 157684 Submittee	04/15/2021 11:40 AM by Pro Se						
 Anytime Last Month 	OFS QA 2017							
O Last Week	Filing Status	Filing Code	Filing Type	Filing Description			Client Ref #	
O Last Two Days Today	Submitted	Acknowledgement	Efile					8
Pick a Custom Range RESET FILTER	Previous 1 Next							1 Result(a) Door 1 of 1 D Help

Figure 14.2 – Bulk History Page

Bulk Drafts

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

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

≡• 🐝 EFILE QA 01 Bulk Draft:	5	?-	•	 -	
Bulk Drafts Filter	FILING HISTORY FILING DRAFTS BULK HISTORY BULK DRAFTS				Filters Applied 31 Result(s) Page 1 of 11
Bulk Number / Name	Bulk # 126 - Testing Test				
Bulk Number	Bulk # 126 Started 03/30/2021 9:34 AM by Pro Se				
Bulk Name	Draft # 779				
Location	Draft # 779 Started 03/30/2021 9:34 AM by Pro Se				
Any Location +	Location OFS QA 2018 - Court at Law				
Case / Draft Number	Dulle # 105 Testing Test				
Case Number	Bulk # 125 - Testing Test Bulk # 125 Started 03/29/2021 2:39 PM by Pro Se				
Draft Number					
Date Range	Draft # 778				
Anytime Last Month Last Week	Draft # 778 Startel 60 229/2021 2:39 PM by Pro Se Lacation OFS QA 2018 - Court at Law				
Last Two Days Today Pick a Custom Range From Date	Bulk # 124 - Testing Test Bulk # 124 Started 03/29/2021 2:36 PM by Pro Se				1
To Date	Draft # 777 Draft 977 Statted 03/29/2021 2:36 PM by Pro Se Location				
RESET	OFS QA 2018 - Court at Law				31 Result(e) Page 1 of 11
	Previous 1 2 3 4 5 6 7 8 9 10 11 Next				31 Result(e) Page 1 of 11
					D Help

Figure 14.3 – 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	? -	. -	 -	2 manual and -
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Lossion * Select				
Location is Required.				
←DASHBOARD				
l≽				
				D Help

Figure 14.4 – 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.

= 🎪 EFILE QA 01 Start Filing	Q-⊕- ∰- ≛
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Loaton # 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	
ß	
	() Help
© 2021 Tyler Technologies, Inc. All F	lights Reserved Version: 0.0.0.1676

Figure 14.5 – Start Filing Page—Bulk Filing Not Supported

= 🎪 EFILE QA 01 Start Filing	0 - ⊕- Ⅲ- ≜
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 14.6 – Start Filing Page—Bulk Filing Supported

START MULTIPLE NEW CASES

3. Click

The Bulk Filing window is displayed.

Bulk Name	
CANCEL	CONTINUE

Figure 14.7 – 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				0 - ⊕- 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				► Ì :
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 14.8 – 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 filing, click to view the onumber.	case	e nu	mbe	r or draft
≡ - 🤹 EFILE QA 01 Upload Documents - Bulk # 93 - Monday Bulk for Plano - Draft # 591 0 -	? -	.	•	A CONTRACTORY
Documents Case Parties Filings Service				
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).				



Figure 14.9 – Upload Documents Page

2. Select each document to be uploaded.

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

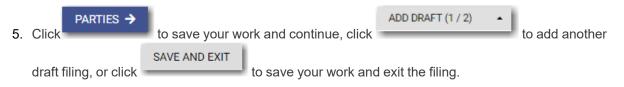
=- 🌼 EFILE QA 01 Case Information - Bulk # 93 - Monday Bulk for Plano - Draft # 591 0 -	Q· ⊕- Ⅲ- ≗
Documents Case Parties Filings Service	
Location * OFS QA2017	Case Category * CMI =
Case Type * Negligence	
Procedures / Nemedies SELECT	Select e
← UPLOAD DOCUMENTS SAVE AND EXIT	ADD DRAFT (1 / 2) - PARTIES →



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

Content of the case of the case category from the Case Category drop-down list.
 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.

=- 🐝 EFILE QA 01 Parties - Bulk # 98 - Monday Bulk fo	r Plano - Draft # 619 🛛 🚺 🕶		8 - + + + + + + + + + + + + + + + + + + +	· III ·	1
Documents Case Parties Filings Se	rvice				
Party Type Required Party	Party Name				Actions
Defendant This is a required Party					A
Personal 🛕 Address Additional Identifie	rs				Hide Details
This is test content for Pro Se Party Personal. Perty Type Defendant Personal Information					
Person Dinity I AM THIS PARTY					
First Name *	Middle Name	Last Name 🗚	Suffix Select		\$
First Name is Required. Purty CMS ID	Select *	Last Name is Required.			
Attorney Information					
Select \$					GO TO ADDRESS
Plaintiff This is a required Party					▲ 🖉
					ADD PARTY
← CASE INFORMATION SAVE AND EXIT				ADI	D DRAFT (1 / 2) ► FILINGS →
					Ø Help

Figure 14.11 – Example of a Parties Page in a Bulk Filing

Note: While you are entering a case filing, click

to view the case number or draft number.

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

- 1. On the **Personal** tab, select **Person** or **Entity**.
- 2. Complete the **First Name**,**Middle Name** (if applicable), and **Last Name** fields. If you are the first party,

Also, if appropriate, select the party's suffix from the **Suffix** drop-down list.

Your name will be entered in the fields.

- 3. Type the party case management system ID in the Party CMS ID field, if appropriate.
- 4. Select a language from the **Interpreter** drop-down list, if appropriate.
- 5. Select **Pro Se** for the filing attorney.

GO TO ADDRESS

to enter the address information for the first party.

click

6. Click

Party Type	Required Party	Party Name			Actions
Defendant	This is a required Party	Kay Defendant			ø
Personal Address	Additional Identifiers				Hide Details
Country United States Address Line 1 City		e Sete Select	Address Line 2	Zip Code	
		Phone Number 0		_	GO TO ADDITIONAL IDENTIFIERS
Plaintiff	This is a required Party	John Plaintiff			1

Figure 14.12 – Address Tab on the Parties Page

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

8. Click	GO TO ADDITIONAL IDE	NTIFIERS to add more information for the specified party.	
Party Type	Required Party	Party Name	Actions
Defendant	This is a required Party	Kay Defendant	ø
Plaintiff	This is a required Party	John Plaintiff	/
Personal	Address Additional Identifiers		Hide Details
Date of Birth MM/DD/YYYY	8		
Figure 1	4.13 – Additional Ider	ntifiers Tab on the Parties Page	
9. Type caler 10.Click	ndar.	n in the Date of Birth field, or click to select the date from the	2
11. Com	plete all of the required	fields for the second party.	
	I have another party to been added to the case		all parties
13. Click work	ADD DRAFT (1 / 2) • and to continue.	to add another filing to the bulk, or click to save	your

Entering Filing Details for a Bulk Filing

The Filings section allows you to enter the filing details.

≣• 🤸 BFILE QA 01 FI	lings - Bulk # 93 - Monday Bulk for Plano - Draft # 591 🛛 🔒	•			8 -	. -	 -	
ocuments Case	Parties Filings Service							
ling Code	Client Ref #	Filin	Description					Actions
								a 🖉 🗊
Details 🛕 Option	onal Services Communication							Hide Detai
Test Content filing details Firm.	. For more information visit: www.google.com							
Filing Type *			Filing Code 🕷					
eFile Only		÷	Select					÷
			Filing Code is Required.					
Filing Description				Client Reference Number				
comments to Court 1								
add comment here								
								GO TO OPTIONAL SERVICES
Filing on behalf of ASSOCIATED PARTIES								
Upload Docun	nents*							
Select a filing code before uplo								
								ADD FILING (1 C
PARTIES SAVE AND EXIT	r						ADD D	RAFT (1 / 2)

Figure 14.14 – Sample Filings Page

Note: While you are entering a case filing, click

ŧ-

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.

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

The **Optional Services** tab is displayed.

Details Optional Services Communication				
Not Selected			Selected	
Zero Fee Service	\$1	→		
Split Fee Service	\$10	>		
Certified Copies	?? x \$5	<i>→</i>		
Per Page Fee Service	22 x	→		
Once Per Party	\$10	>		
Priority Processing	22 x \$4	>		
Placeholder Service 1		>		
Placeholder Service 2 with a long description to trigger horizontal scrolling		>		
Placeholder Service 3		→		
Placeholder Service 4		>		
TOGA Decline Error	\$280	>		
Broken Fee	\$10	>		
Per Page Fee No Multiplier		→		
				GO TO COMMUNICATION

Figure 14.15 – 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 Parti	ies to this Filing				
First Name	Last Name	Entity	Party Type Select	➡ FILTER RESET	r
Select	Party Name			Party Type	
	Phil Defendant			Defendant	
	Susan Plaintiff			Plaintiff	
Previous 1 Next	t				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

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 14.17 – Upload Documents Pane

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ ■			
		2201105		
	Drag files here or	BROWSE		
Maximum Filesize: 50.00 MB				
Supported File Types: TIFF Files (T	IFF TIF) WordPerfect File (WPD) Word 2007 File (DC	OCX) Word 97/XP File (DOC) Portable
Document File (PDF) XML Docume	ent (XML) Windows Media File (WMV) MPEG (MPEG).	

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

Figure 14.18 – 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 adde	d all of your lead documents, click
	ADD DOCUMENTS
17. If you have attachme	ents to add to the filing, click section in the Attachments section.
18. If you want to add se	ecurity to any of the documents, select an option from the Security drop-down list.
SERVICE →	to save your work and continue, click
draft filing, or click	SAVE AND EXIT to save your 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.

=- 🌼 EFILE QA 01 Bulk Fees / Summary	9 -	. -		-
Bulk # 87 - Testing Test				
After filling in the required fields, click on "CALCULATE FEES" at the bottom of the page. To view the fee details on individual drafts, click on "FEE DETAILS".				
Apply Payment Account to All Darhs Select APPLY TO ALL*				
* Payment accounts may be restricted at some locations				
	Case Type Landlord / Tenant ©	SEARCH		
	Case Type Collection	SEARCH		
BULK DASHBOARD SAVE DRAFT AND EXIT			CALC	ULATE FEES SUMMARY ->

Figure 14.19 – 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:

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.

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

2. 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 Resp	oonsible For Fees					
First Name	Last Name	Entity	Select	\$	FILTER	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 14.20 – 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.

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

=- 🐝 EFILE QA 01 Bulk Fees / Summary			Ø- ()· III·	≜
Bulk # 87 - Testing Test					
After filling in the required fields, click on "CALCULATE FEES" at the bott	om of the page. To v	iew the fee details on individual drafts, click on "FEE DETAI	LS".		
keply Payment Account to All Drufts Select Payment accounts may be restricted at some locations					
Draft # 560					
Location OFS QA 2018 - Court at Law	Case Category Civil		Case Type Landlord / Tenant		
Payment Account * Pro Se Waiver	\$	Party Responsible for Fees Test test	\$	SEARCH	
riler Type Default		•			
Draft # 1658	Case Category		Case Type		
OFS QA 2018 - Court at Law	Civil		Collection		
Payment Account * Pro Se MC	•	Party Responsible for Fees Amy Adams	÷	SEARCH	
Filer Type Default		•			
naignir		•			
← BULK DASHBOARD SAVE DRAFT AND EXIT					CALCULATE FEES D Help

CALCULATE FEES

Figure 14.21 – Sample Bulk Fees/Summary Page—Completed Fields

4. When all fields on the page have been completed, click

The Fee Details button is displayed.

FEE DETAILS

5. 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
	GLOSE

Figure 14.22 – Sample Fee Details Window

6. 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.

=- 🐝 EFILE QA 01 Bulk Fees / Summary			?-	. -	 -	1
Bulk # 157 - Sports Cases						
OFS QA 2017						
Submission Agreements	for E-Filing					
You must accept the Submission Agreements.	IOI ETHING					
Draft # 992						
Location OFS QA 2017	Case Category Civil	Case Type Negligence				
Draft # 993						
OFS QA 2017	Case Category Civil	Case Type Malpractice				
← FEES SAVE DRAFT AND EXIT						SUBMIT

Figure 14.23 – 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			0 - ⊕- Ⅲ-	1
Bulk # 157 - Sports Cases			Bulk submission is complete.	BULK HISTORY DASHBOARD
OFS QA 2017				
Draft # 992	Case Category Civil	Case Type Negligence		0
Draft # 993	Case Category	Case Type		•
OFS QA 2017	case category Civil	Lase type Malpractice		
FEES SAVE DRAFT AND EXIT				SUBMIT

Figure 14.24 – Sample Bulk Fees / Summary Page After Filing is Submitted



SUBMIT

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.

=- 🐝 EFILE QA 01 Bulk Filing Dashboard				0 - ⊕- 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	Case Category		Сазе Туре	
Ouick Actions	OFS QA 2017	Civil		Negligence	
BULK ADD FILINGS	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description	Client Ref #	
ADD DRAFT	Acknowledgement	eFile Only			
	Draft # 993				
	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(s).
SAVE DRAFT AND EXIT					FEES →

Figure 14.25 – 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		Ø	- - II	- 1
Drafts Add Filings Save Filings				
□ Select All				
Filter:	Case Category	Case Type		
Select	Select	\$ Select		\$
				RESET FILTER
□ OFS QA 2017				
□ Draft # 992				
OFS QA 2017	Case Category Civil	Case Type Negligence		
🗆 Draft # 993				
OFS QA 2017	Case Category Civil	Case Type Malpractice		
← BULK DASHBOARD				ADD FILINGS →

Figure 14.26 – 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.

FILTER



The **Add Filings** tab is displayed.

g Code	Client Ref #	Filin	g Description			Action
·			• •			🛕 🗾 î
Details 🛕 Optio	onal Services Communication					Hide De
est Content filing details Firm	n. For more information visit: www.google.com					
ling Type \star			Filing Code *			
eFile Only		÷	Select			•
			Filing Code is Required.			
ling Description				Client Reference Number		
omments to Court 🚯						
dd comment here						
						GO TO OPTIONAL SERVICES
Jpload Docun	mente*					
elect a filing code before uplo	bading documents.					
						ADD FILING (1

Figure 14.27 – 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 o	r BROWSE		
Maximum Filesize: 50.00 MB				
Supported File Types: TIFF Files (1	TIFF TIF) WordPerfect File (WP ent (XML) Windows Media File	,	, , ,) Portable

Figure 14.28 – Select document(s) for Lead Document Window

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.

BROWSE

SAVE FILINGS 🗲

9. Click

The Save Filings tab is displayed.

=- 🤹 EFILE QA 01 Bulk Add Filings				? -	.	 -	1
Drafts Add Filings Save Filings							
Filings							
Filing Code	Filing Type eFile Only	Filing Description		Client Ref #			
Draft # 992 Location OFS QA 2017	Case Category Civil		Case Type Negligence				
Draft # 993 Lootoon OFS QA 2017	Case Category Civil		Case Type Malpractice				
← ADD FILINGS							SAVE



10. On the Save Filings tab, click

e	Λ1	1	
3	۳.	v.	

The Associate Parties button is displayed for each filing.

SELECT ALL

=- 🐝 EFILE QA 01 Bulk Add Filings					8-	. -	 -	.
Drafts Add Filings Save Filing	gs							
Filings								
Filing Code Acknowledgement	Filing Type eFile Only		Filing Description		Client Ref	7		
Draft # 992 Loaden OFS QA 2017 ASSOCIATE PARTIES		Case Category Civil		Case Type Negligence				٥
Draft # 993 Location OFS QA 2017 ASSOCIATE PARTIES		Case Category Civil		Case Type Malpractice				٥
← 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 14.31 – Select Filings Window

12. Select the check boxes for the filing codes that you want to add, or click . Then, click SELECT

The Associate Parties to selected Filing(s) window is displayed.

Associate	Parties to selec	ted Filing(s)		
First Name	Last Name	Entity	Party Type 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 14.32 – 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 3rd Party Defendant 3rd Party Plaintiff 4th Party Defendant Ad Litem Administrator Affiant Agent Appellant Appellee Applicant Assault Victims Attorney Attorney Ad Litem
Attorney General
Bank Bondsman Child Victims Of Physical Abuse City Civil Defendant

FILTER

Figure 14.33 – 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.

START FILING

To file into multiple existing cases:

1. On the *Dashboard* page, click

The Start Filing page is displayed.

E 🀝 FFILE QA 01 Start Filing	?-	.	 -	1 maar 1 maar 1 maa ma
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loato * Select +				
Location is Required.				
← DASHBOARD				
l ³				
				O Help

- Figure 14.34 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	Q-⊕- ∰- ≗		
Select Filing Location			
Select your filing location to see which types of filings are allowed at that location.			
Looto * 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			
l≯			
	() Help		
© 2021 Tyler Technologies, Inc. All F	lights Reserved Version: 0.0.0.1676		

Figure 14.35 – Start Filing Page—Bulk Filing Not Supported

= 🎪 EFILE QA 01 Start Filing	⊘ ∙ ⊕• <u>⊞</u> • ≜
Select Filing Location Please select your location below. Location # OFS QA 2017 +	4
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 14.36 – Start Filing Page—Bulk Filing Supported

3. Click

FILE INTO MULTIPLE EXISTING CASES

The Bulk Filing window is displayed.

190

CONTINUE

Bulk Filing	×
Bulk Name	
	CANCEL CONTINUE

Figure 14.37 – 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	⊙ - ⊕- <u>⊞</u> - <u>▲</u> -
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 FLINGS Find Cases	
CASE SEARCH BOOKMARKS SEARCH FILING HISTORY SEARCH	
SAVE DRAFT AND EXIT	FES →



- 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.

8-	.	 -	≜ manual constant
			O Help
	0 -		

Figure 14.39 – 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	⊘ ∽ ⊕∽ Ⅲ ∽ ≜		
Select Filing Location Please select your location below.			
Location * OFS QA 2017	ß		
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 14.40 – Start Filing Page—Bulk Filing Supported

	FILE INTO MULTIPLE EXISTING CASES	
3. Click		

The Bulk Filing window is displayed.

CONTINUE

Bulk Filing	×
Bulk Name	
	CANCEL CONTINUE

Figure 14.41 – 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	0 - ⊕- 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 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 🗲

Figure 14.42 – 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 Bulk			
Location Select	Case Number	Description	FILTER RESET
Case #CC-20-3600	Tim Thompsonv.Laura and Associates		
Case #CC-21-006 a	av.Ben Benson		
Case #CC-21-116 An	ndrea Thompsonv.ABC Consultants		
Case #CC-21-117 Na Location OFS QA 2017	aomi Watson v. Helena Carter		
Case #CV-2020-12785 Jane Doe vs John Smit		ie5 Doe5 vs Jane6 Doe6 vs Jane7 Doe7 vs Jane8 Doe vs Jane9	9 Doe vs Jane10 Doe vs J
Previous 1 Next			5 Result(s) Page 1 of 1
			CANCEL PROCEED

Figure 14.43 – Sample Bookmarks Window

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

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

PROCEED



The Add to Bulk window is displayed.

Bookmarks Add to Bulk	
Case #CC-21-116 Andrea Thompsonv.ABC Consultants Location OFS QA 2017	
BACK	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	s 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		Case Type		
	OFS QA 2017		Civil		Malpractice		
Quick Actions	Filing Code	Filing Type		Filing Description		Client Ref #	
BULK ADD FILINGS	Acknowledgement	eFile Only					
Find Cases							
CASE SEARCH	Case # CC-21-11	84					
BOOKMARKS SEARCH	Location OFS QA 2017		Case Category Civil		Case Type Negligence		
FILING HISTORY SEARCH	Filing Code	Filing Type		Filing Description		Client Ref #	
	Acknowledgement	eFile Only					
							2 draf

Figure 14.45 – 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.

8-	.	 -	≜ manual constant
			() Help
	0 -		

Figure 14.46 – 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	⊘ ∽ ⊕∽ Ⅲ ∽ ≜				
Select Filing Location Please select your location below.	Ν				
Loator * OFS QA 2017	[3				
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 14.47 – Start Filing Page—Bulk Filing Supported

	FILE INTO MULTIPLE EXISTING CASES	-
3. Click		

The Bulk Filing window is displayed.

CONTINUE

Bulk Filing	×
Bulk Name	
	CANCEL CONTINUE

Figure 14.48 – 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	0· +· III· 1	-
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 ->

Figure 14.49 – Sample Bulk Filing Dashboard Page

5. In the Quick Actions pane, click

The Case Search window is displayed.

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

Figure 14.50 – 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 Cas	se Search Results Add to Bulk		
Location: OFS QA 2017 Case	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

SEARCH

Figure 14.51 – 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 14.53 – 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	
	. 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					?-	۰.	 -	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 14.54 – 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
- The Start Filing page is displayed.

1. On the *Dashboard* page, click

= 🌾 EFILE QA 01 Start Filing	? -	.	 -	•
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loato s# Select +				
Location is Required.				
← DASHBGARD				
13				
				() Help

Figure 14.55 – 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	⊘ ∽ ⊕∽ Ⅲ ∽ ≜	
Select Filing Location Please select your location below.		
Location * OFS QA 2017	ß	
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 14.56 – Start Filing Page—Bulk Filing Supported

	FILE INTO MULTIPLE EXISTING CASES	
3. Click		

The Bulk Filing window is displayed.

CONTINUE

Bulk Filing		×
Bulk Name		
	CANCEL	CONTINUE

Figure 14.57 – 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	0· +· III· 1	-
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 ->

FILING HISTORY SEARCH

Figure 14.58 – Sample Bulk Filing Dashboard Page

5. In the Quick Actions pane, click

s pane, click

The Filing History window is displayed.

cation	Case Number		
Select	Case Humber		
e Range	From Date	To Date	
Anytime	+	□	
			FILTER RESET
			THE REAL
Choose at most 2.			
Case #CC-20-2697			
Case #CC-20-2097			
Location	Case Category	Case Type	
OFS QA 2017	Civil	City Ordinance Cases	
Case #CC-20-1971			
Location OFS QA 2017	Case Category Civil	Case Type City Ordinance Cases	
Case #CC-20-2041			
Pro Sev.Frederick & Sons			
Location	Case Category	Case Type	
OFS QA 2017	Civil	Breach Of Contract	
Previous 1 Next			3 Result(s) Page 1
			CANCEL PROCEED

Figure 14.59 – Sample Filing History Window

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

PROCEED

The Add to Bulk window is displayed.

Filing History Add to Bulk			
Case #CC-20-1971			
Location OFS QA 2017	Case Category Civil	Case Type City Ordinance Cases	
BACK			CANCEL ADD TO BULK



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 location from the Location drop-down list. Then, type the case number in the Case Number field, and then select the date range for the filings you want to

	displa	ay. Then, click	FILTER		
7		ADD TO BULK	and then all all	DONE	
/	Click		and then click	_	

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 - Spor	ts Cases					2 draf
If you wish to edit or add details to a specific draft, you may do so.	Case # CC-21-1	185	Case Category		Case Type Malpractice		
Quick Actions	Filing Code	Filing Type		Filing Description		Client Ref #	
BULK ADD FILINGS	Acknowledgement	eFile Only		- may - addigated		Access of Access of	
Find Cases	Case # CC-21-1	184					
CASE SEARCH BOOKMARKS SEARCH	Location OFS QA 2017	104	Case Category Civil		Case Type Negligence		
FILING HISTORY SEARCH	Filing Code Acknowledgement	Filing Type eFile Only		Filing Description		Client Ref #	
							2 draf

Figure 14.61 – 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.

Bulk # 136 - N Bulk # 136 Started 04/14/2021 Started 04/14/2021	Wednesday Test 5:21 PM by Lauren Groswald				
Draft # 817 Draft # 817 Started 04/14/2 Location OFS QA 2017	7 2021 5:21 PM on behalf of Jack Stone by Lau	iren Groswald			B
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Draft	Acknowledgement	Efile			
Draft	Abstract Of Judgment	Efile			
	} 2021 5:24 PM on behalf of Jack Stone by Lac	iren Groswald			
Location OFS QA 2017					
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Draft	Acknowledgement	Efile			





The filing that you copied is displayed on the Bulk Filing Dashboard page.

■				? - ⊕- 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 drai
If you wish to edit or add details to a specific draft, you may do so.	Draft # 992	Case Category		Case Type	
Quick Actions	0FS QA 2017	Civil		Negligence	
BULK ADD FILINGS	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description	Client Ref #	
ADD DRAFT	Acknowledgement	eFile Only			
	Draft # 993)
	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 d
SAVE DRAFT AND EXIT					FEES

Figure 14.63 – Sample Bulk Filing Dashboard

4. Continue with your filing.



Topics covered in this chapter

Creating a Report

You can generate a report that can be used to reconcile financial transactions for envelopes and filings that you submitted. The report is available in a Microsoft Excel spreadsheet that you can download.

Creating a Report

To run a report:

1. On the Dashboard menu, click Reports.

The *Reports* page is displayed.

EFILE QA 01 Reports			0 - ⊕- II	!	•
Reports					
	relopes submitted during a selectable time frame up to 60 days. * Provide	es envelope and filing level information specific to fees. * Deli	vered in an Excel spreadsheet to allow f	for filtering and searching.	
All SELECT					
Status All Statuses Accepted	Reviewed	Date From 🗚	Date To *		t
Cancelled	 Served Submission Failed 	Date From is Required.	Date To is R	Required.	
Returned	Submitted			CANCEL DOWNLOAD REPOR	RT
6					

Figure 15.1 – Reports Page

2. 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		^
▼ □ System		
 File and Serve 		
 OFS Criminal (QAJUDTX) 		
OFS Criminal (QAJUDTX)Court At Law		
 OFS QA 2017 		
OFS QA 2017 - Court at Law		
OFS QA 2017 - Court at Law 1		- 1
OFS QA 2017 - Court at Law 2		
 OFS QA 2018 		
OFS QA 2018 - Court at Law		- 1
OFS QA 2018 - Court at Law 1		
OFS QA 2018 - Court at Law 2		
✓ OFS QA 2014	2	
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 15.2 – Select Locations Dialog Box

- 3. Select the locations that you want to include in the report, and then click
- 4. Select the statuses that you want to include in the report.
- 5. Type the date range for the report, or click to select the dates from the calendar.

Note: The date range that you select cannot exceed 60 days. If it does, an error message is displayed.

DONE

Date From * 02/12/2020	İ	Date To * 05/20/2020		Î
Date range cannot exceed 60 days.				
			CANCEL	DOWNLOAD REPORT



6. Click

The report is downloaded in a Microsoft Excel file, which you can filter and sort as needed. The report includes one tab for filings and one tab for envelopes.

16 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		
L3	BACK TO SUPPORT / FEEDBACK	CLOSE

Figure 16.2 – 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	1	CLOSE	1
4.	Either click		, or click		

Zendesk Support

A new Help icon has been added to every page in the application.

Filing History	Drafts Ø
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
View Filing History	View My Drafts
Bookmarks	Templates
CC-19-2373 - Drina Colin v. McDonald Associates LLC OFS QA 2017 - Court at Law	Small Claims template
CC-15-1813 - ******* File and Serve	simple civil
View My Bookmarks	View My Templates
	Case # CC-20-182 Ervelope # 3277 Submitted at 10/21/2020 10:50 AM Filings: Submitted (1) Case # CC-20-182 Ervelope # 3275 Submitted at 10/19/2020 5:39 PM Filings: Submitted (1) Case # CC-20-182 Ervelope # 3275 Submitted at 10/19/2020 5:28 PM Filings: Submitted (1) View Filing History Bookmarks CC-19-2373 - Drina Colin v. McDonald Associates LLC OFS QA 2017 - Court at Law CC-15-1813 - ******* File and Serve

Figure 16.3 – 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 Hi! 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 16.4 – 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.

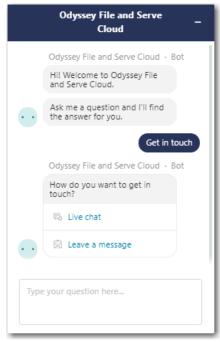


Figure 16.5 – Chat Modal with Communication Options

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 16.6 – Support / Feedback Window

GIVE FEEDBACK

The *Feedback* window is displayed.

Feedback		×
Feedback Type 🔺		
Feedback		\$
Feedback 🕊		
Feedback is Required.		//
It is ok to contact me about this feedback		
	BACK TO SUPPORT / FEEDBACK	CLOSE

Figure 16.7 – Feedback Window

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

Feedback Type \star	
Feedback	€
Select	
Feedback	
Suggestion	
Other	

Figure 16.8 – 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.