# Individual Filer User Guide

## Odyssey® File & Serve™ 2021.5

ESO-FS-200-4494 v.12

July 2021

# Copyright and Confidentiality



# Publishing History

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

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

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

| Document Publication Number | Revision | Date | Changes Made |
| --- | --- | --- | --- |
| | | | • Added information about the new Mail Service fees<br>• Added information about tracking certified mail for a filing on the *Envelope Details* page<br>• Updated the Service Contacts section to include information about the service method drop-down list on the *Service* page<br>• Updated the “Creating a Service Only Filing” topic<br>• Updated the “Filing into an Existing Case from the Dashboard Page” topic |
| ESO-FS-200-4494 v.10 | Tenth | March 2021 | The following changes were made:<br>• Reordered chapters to better represent normal usage during a case filing<br>• Updated the *Upload Documents* page to include all document types that are now supported for uploading<br>• Added the case level address feature<br>• Revised the “Viewing the Envelope Details” topic<br>• Created separate topic for viewing mail service fees in the envelope details |

| Document Publication Number | Revision | Date | Changes Made |
|---|---|---|---|
| ESO-FS-200-4494 v.11 | Eleventh | May 2021 | The following changes were made:<br>• Added bulk filing to this release<br>• Added the ability to add a service contact that is not associated with any party on the case to an initial filing |
| ESO-FS-200-4494 v.12 | Twelfth | July 2021 | The following changes were made:<br>• Added the vacation letter (or leave of absence) feature<br>• Added the capability to collect additional data on the *Case Information* page. The data that is collected is then transferred to forms used in civil and family cases.<br>• Added the Service of Process feature. The data that is collected is then transferred to forms used in civil and family cases.<br>• Updated the case search sections to include the use of the ENTER button for case searches |

# Contents

# List of Figures

# About This Guide

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

User guides may include the following elements:

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

### Audience

This document is intended for the following personas:

- Clients
- Tyler Client Services

### Documentation Conventions

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

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

### Documentation Notes

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

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

# 1 System Overview

**Topics covered in this chapter**



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 2021.5 Enhancements

The following enhancements were made to the Odyssey® File & Serve™ system for Release 2021.5.

| Feature/Update | Description/Location in Document |
|---|---|
| The vacation letter (or leave of absence) feature was added to this release. | Vacation Letter (or Leave of Absence), page 219 |
| The capability to collect additional data on the *Case Information* page was added. Also, the Service of Process feature was added. The data that is collected is then transferred to forms used in civil and family cases. | Auto Generated Documents, page 101 |
| The Case Search feature was updated to allow users to press ENTER to perform a case search. | The following topics were updated:<br>• File into an Existing Case, page 124<br>• Filing into an Existing Case from the Case Search Page, page 128<br>• Filing into an Existing Case from the Dashboard Page, page 132<br>• Filing into a Non-Indexed Case, page 136<br>• Filing into Multiple Existing Cases Using Case Search, page 209 |

## 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.

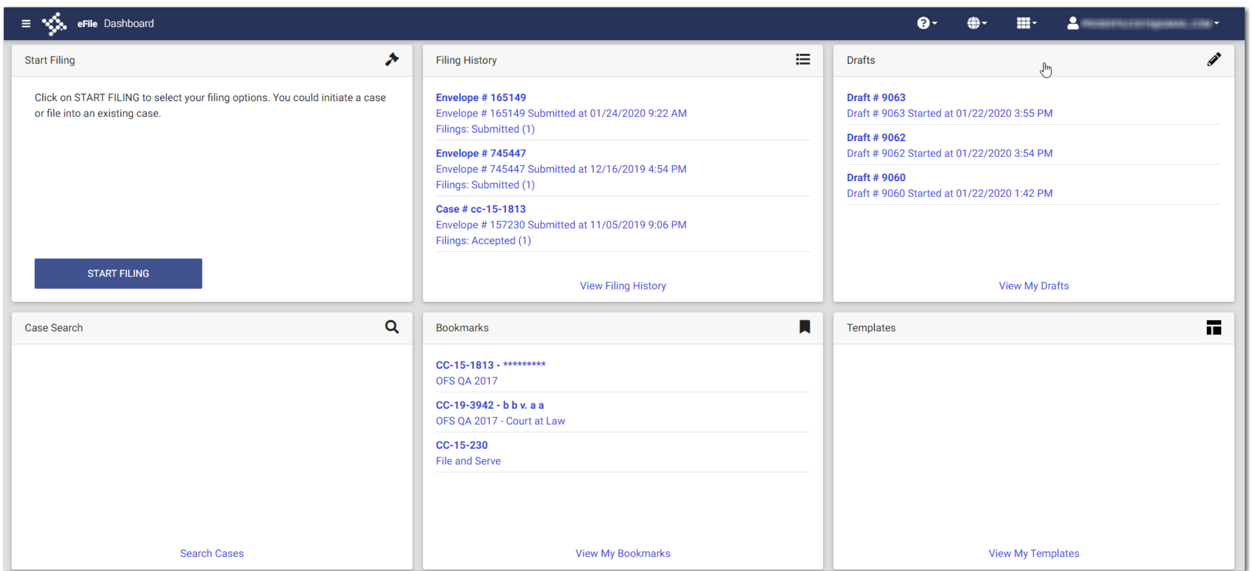



**Figure 1.1 – Dashboard Page**

### 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.

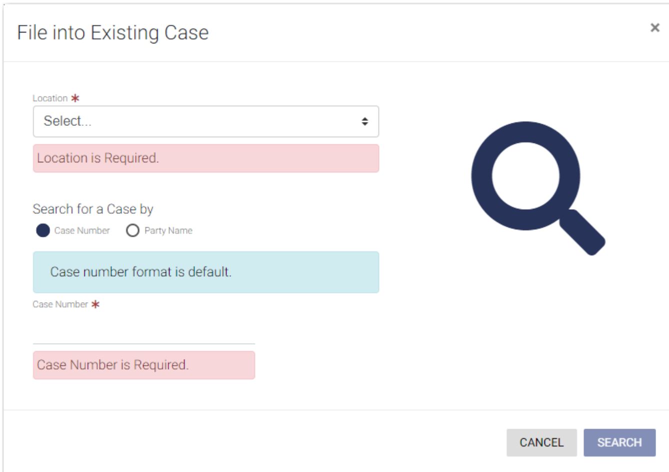



**Figure 1.2 – File into Existing Case Window—Includes Party Name Option**

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

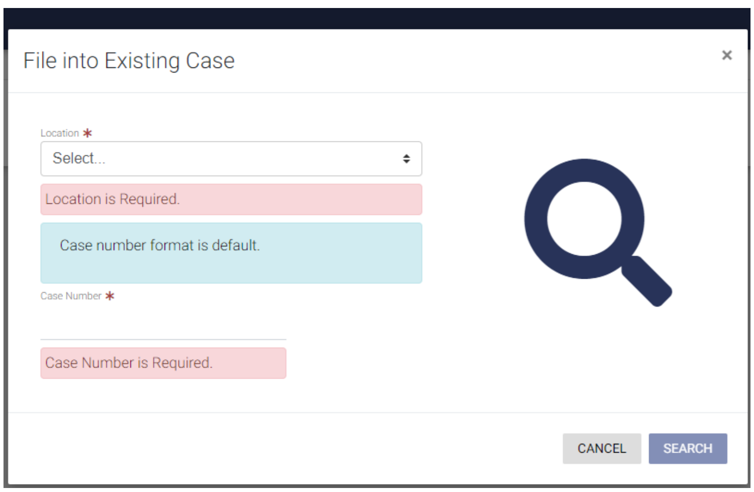



**Figure 1.3 – File into Existing Case Window—Excludes Party Name Option**

If your search does not produce any results, click 

to return to the *Dashboard* page.

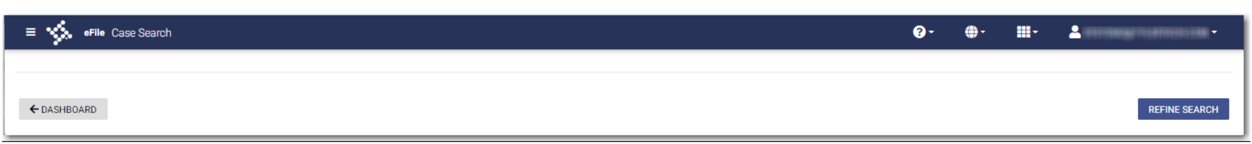
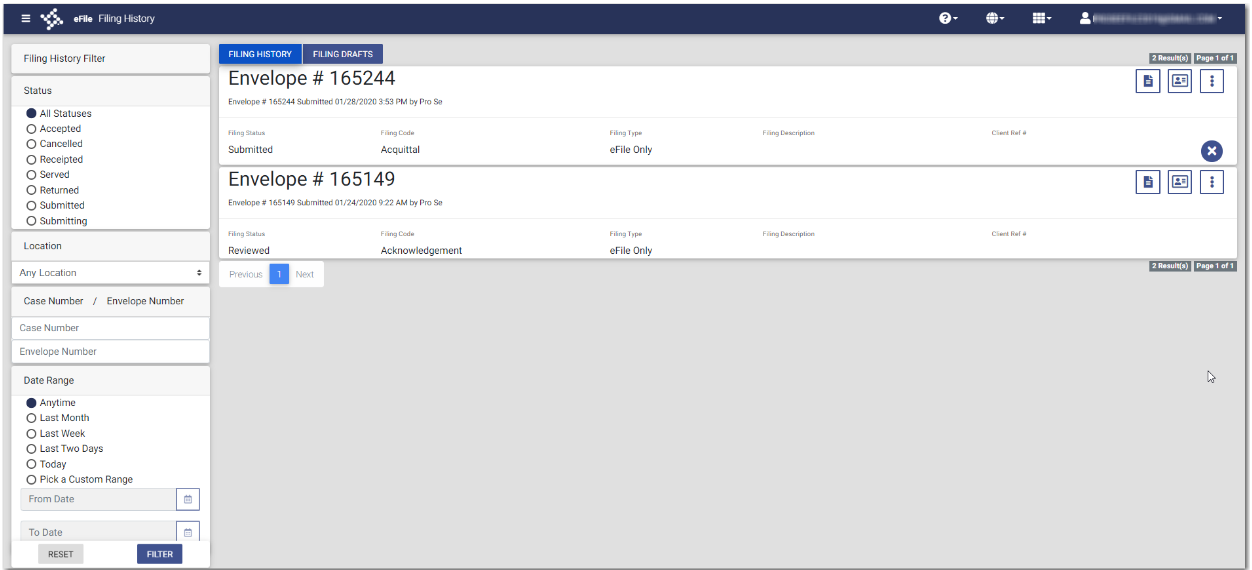



**Figure 1.4 – Case Search Page with No Search Results Displayed**

### Filing History

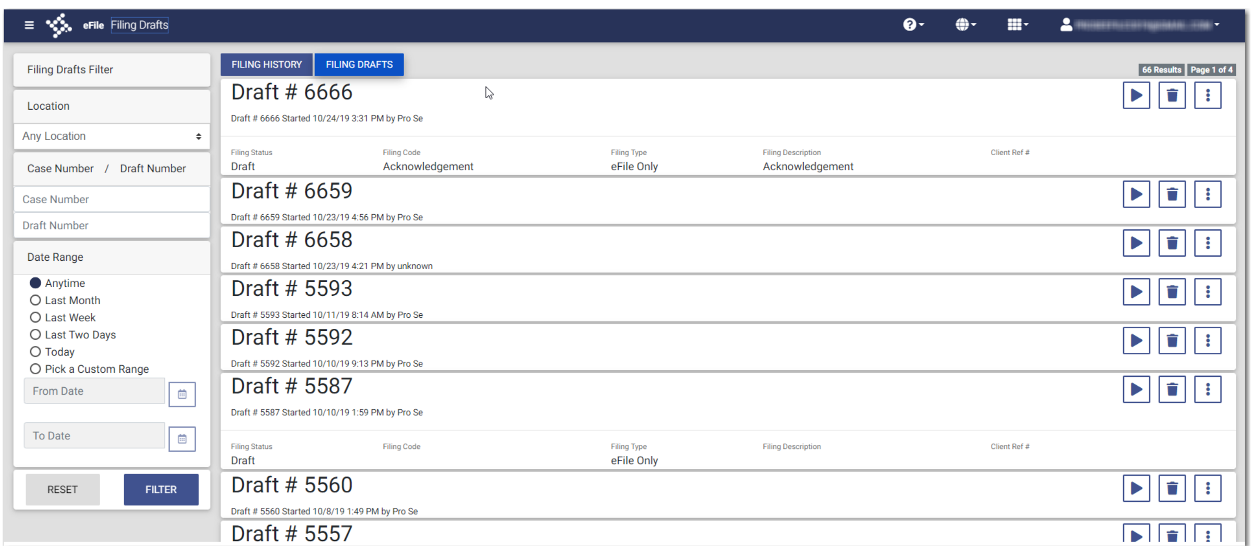
On the Dashboard menu, click **Filing History**. From here, you can view your filing history. You can also view the details for a specified case, file into an existing case, or view the service contacts attached to the case.




## 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.




## 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.

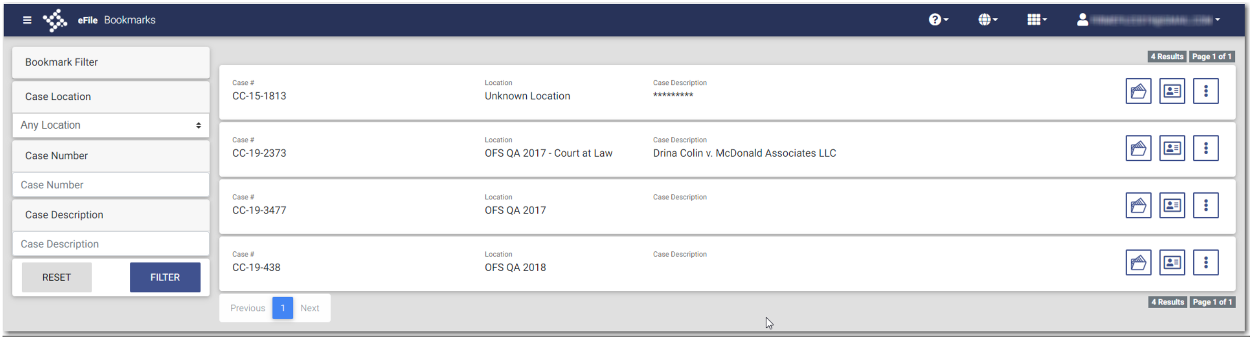


Figure 1.7 – Sample Bookmarks Page

### 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.

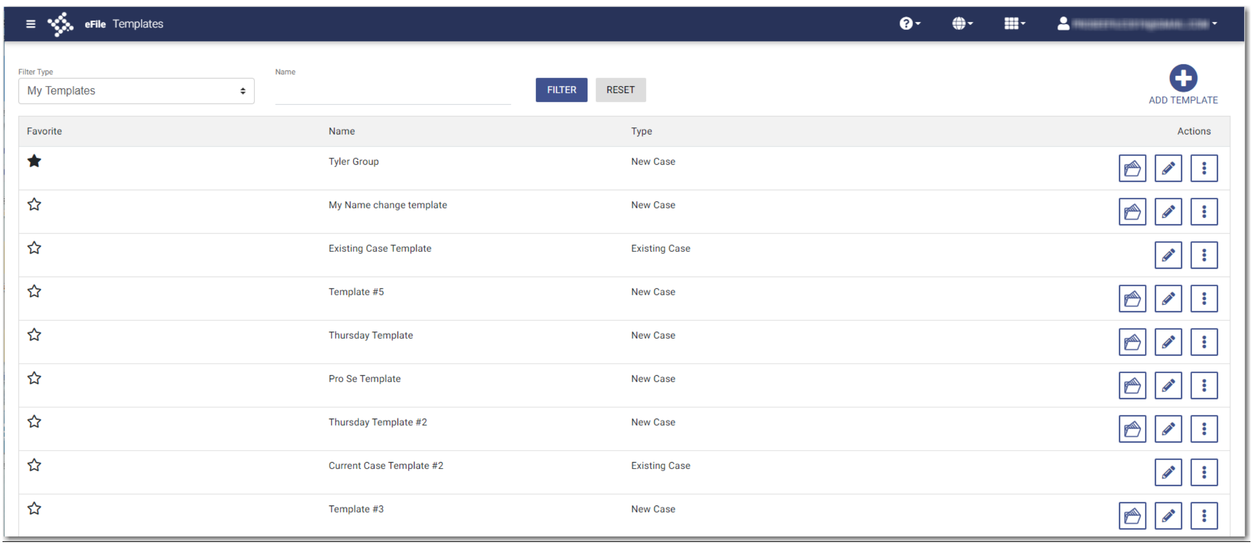


Figure 1.8 – Templates Page

### 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.

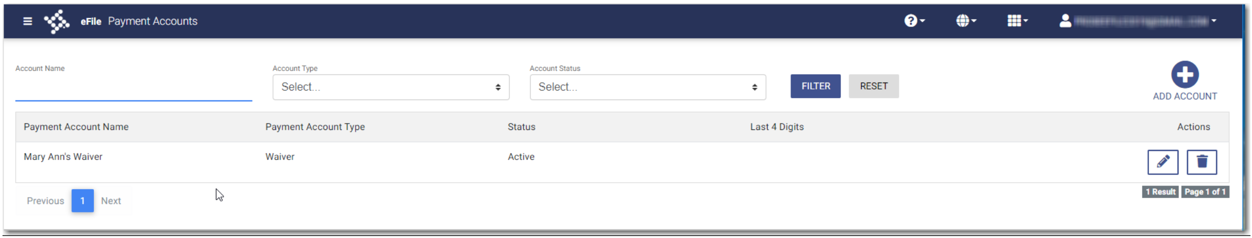



**Figure 1.9 – Payment Accounts Page**

### 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.

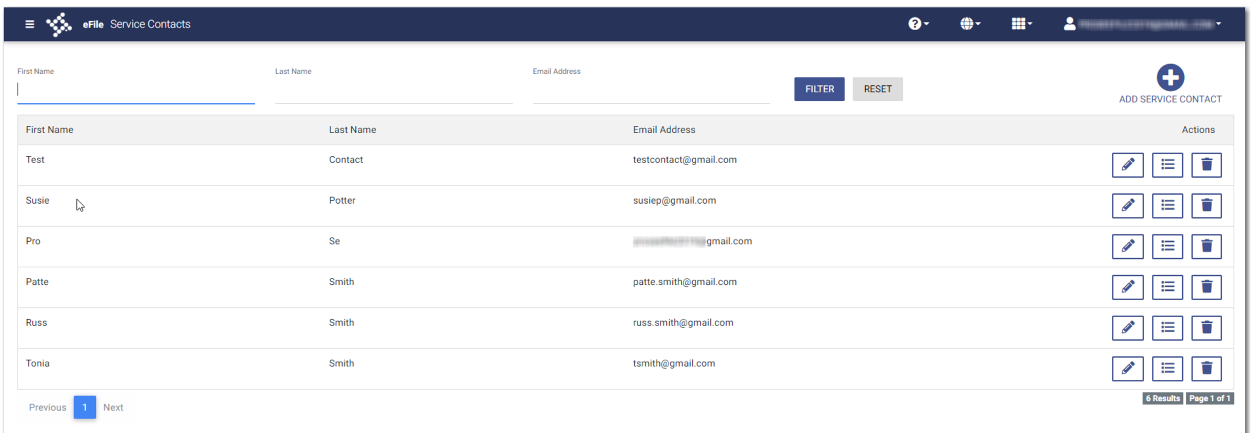



**Figure 1.10 – Service Contacts Page**

### My Information

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

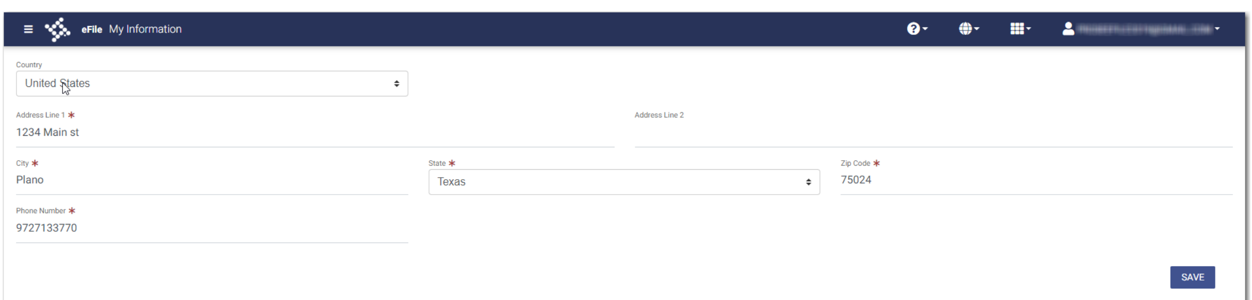



**Figure 1.11 – My Information Page**

### Account Settings

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

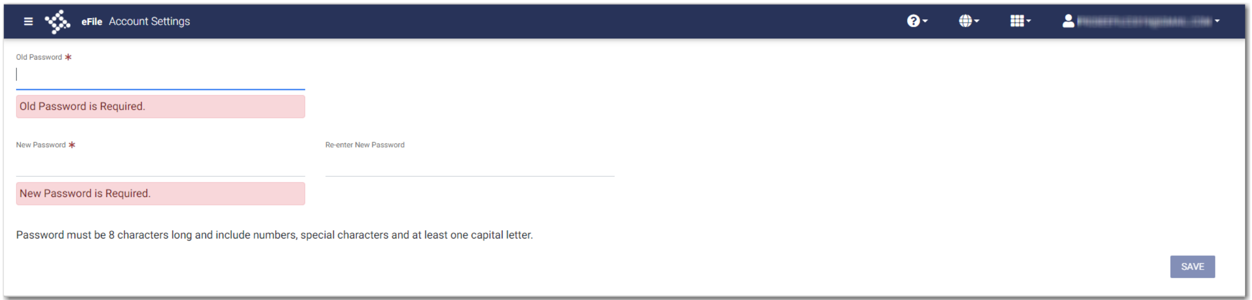



**Figure 1.12 – Account Settings Page**

### 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.

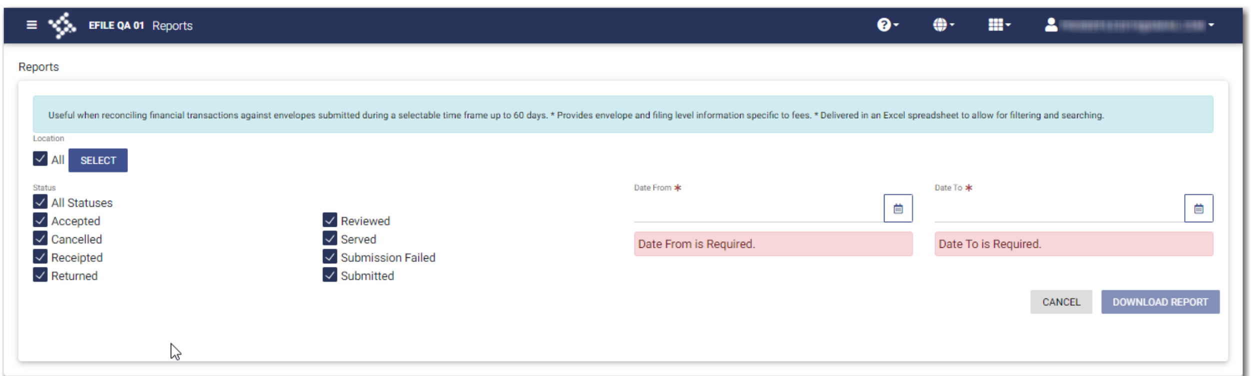



**Figure 1.13 – Reports Page**

# 2 E-Filing Overview

**Topics covered in this chapter**

♦ Filing Queue Status

This section describes the e-filing process.

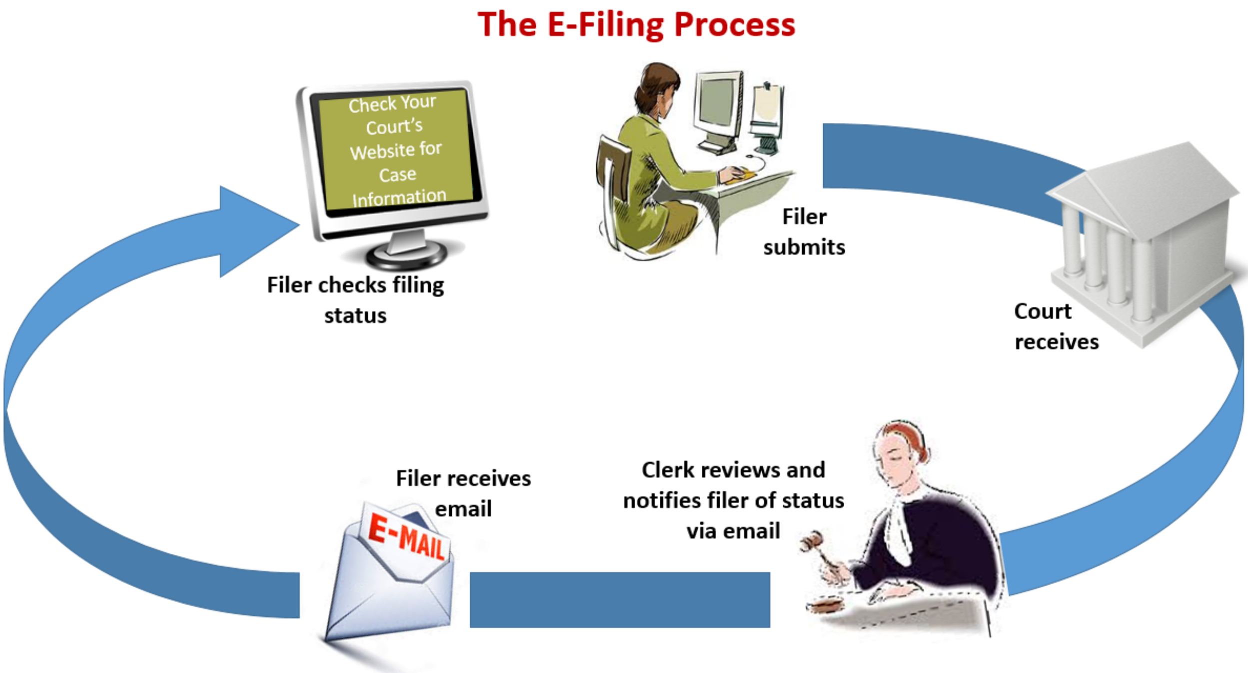



**Figure 2.1 – The E-Filing Process**

Once a user has registered to use Odyssey® File & Serve™, 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.<br><br>**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 *Details* page, and the filer is notified of the specifics through email. |

# 3 Landing Page

**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.

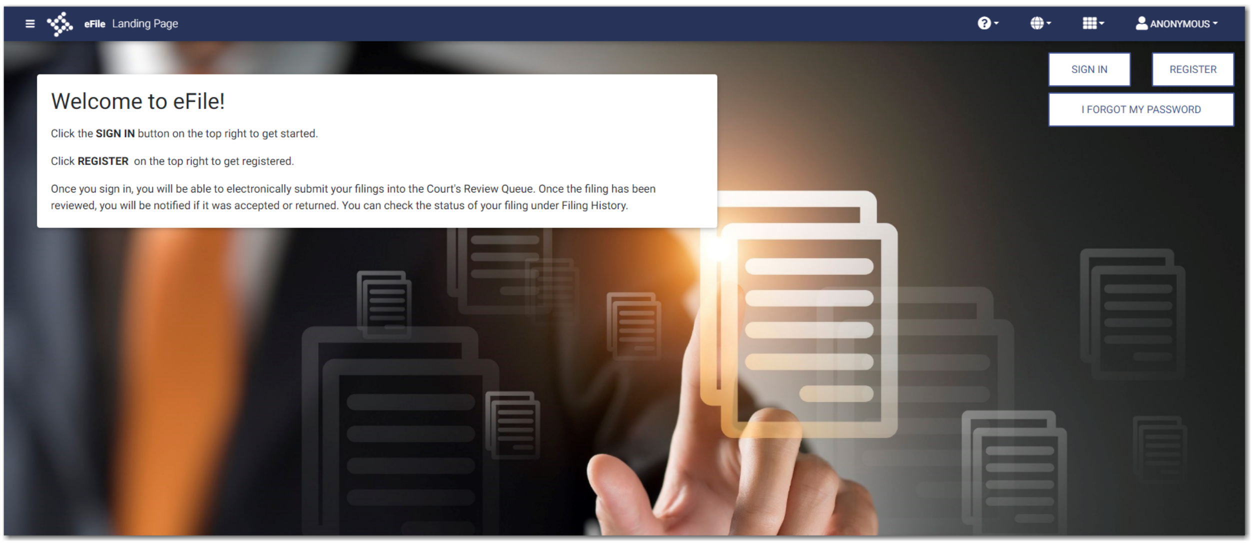


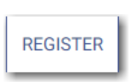

**Figure 3.1 – eFile Landing Page**

## 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.**

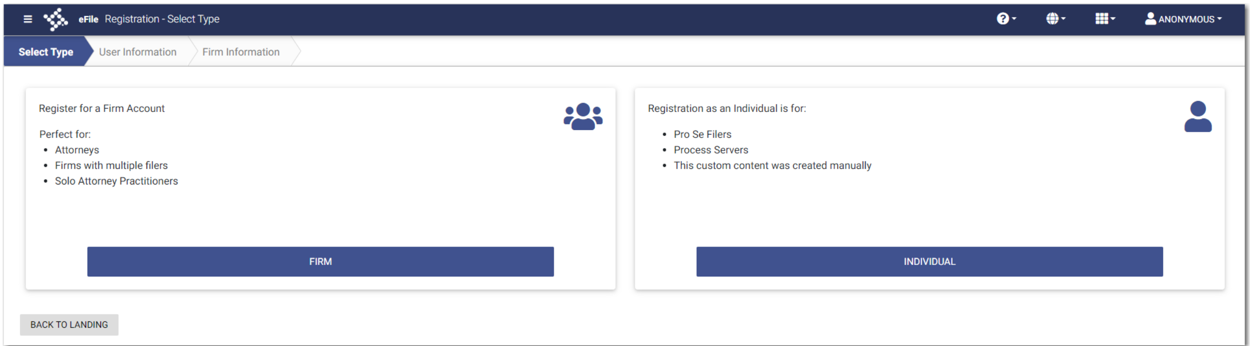



**Figure 3.2 – Registration – Select Type Page**

2. Click **INDIVIDUAL**.

   The *Registration - User Information* page is displayed.

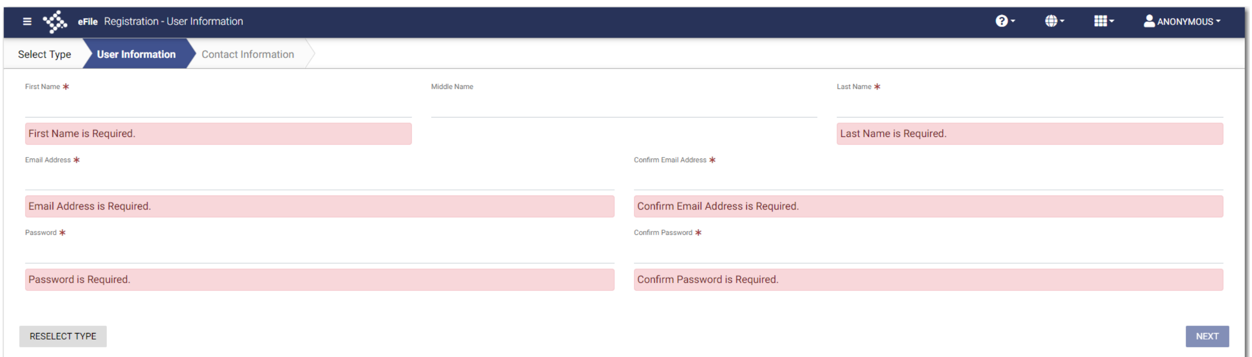



**Figure 3.3 – Registration - User Information Page**

3. Complete the required fields, and then click **NEXT**.

   The *Registration - Firm/Contact Information* page is displayed.

4. Complete the address and phone number fields.

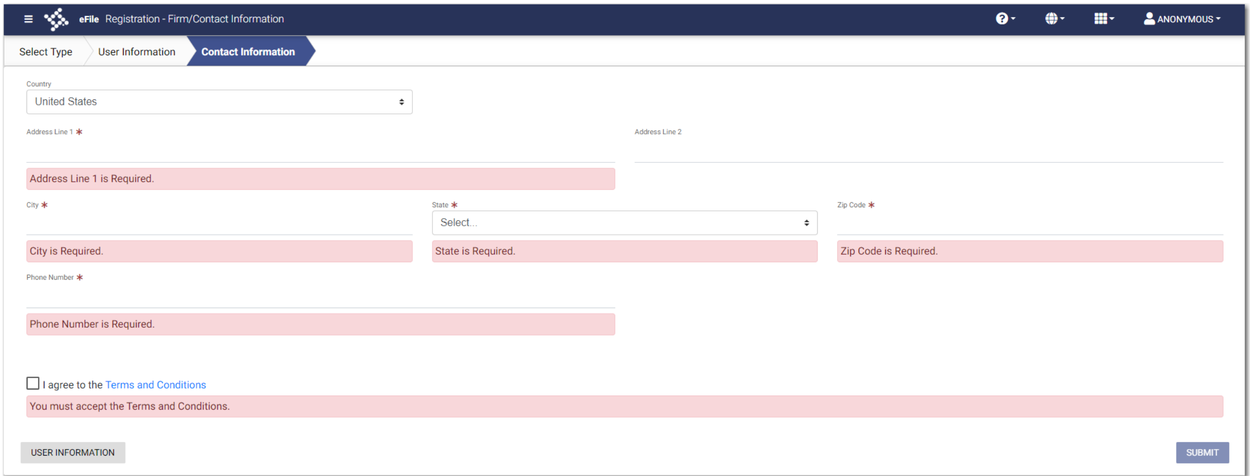



**Figure 3.4 – Registration - Firm/Contact Information Page**

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.**

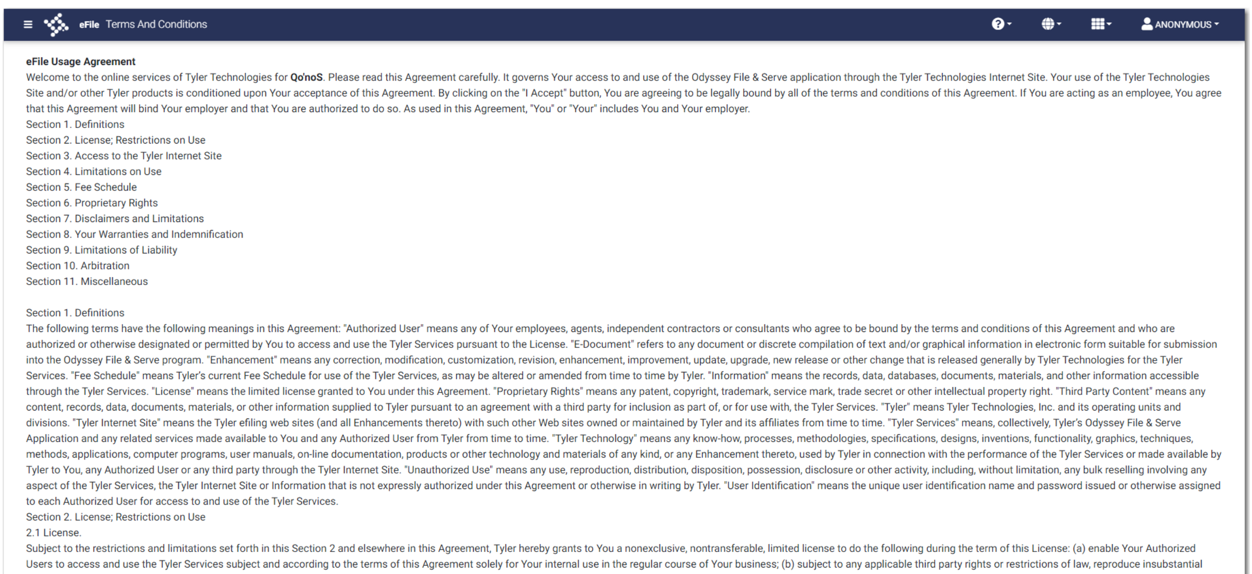
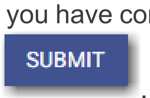



**Figure 3.5 – Example of Terms and Conditions**

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

.

   The *Registration - Success* page is displayed.

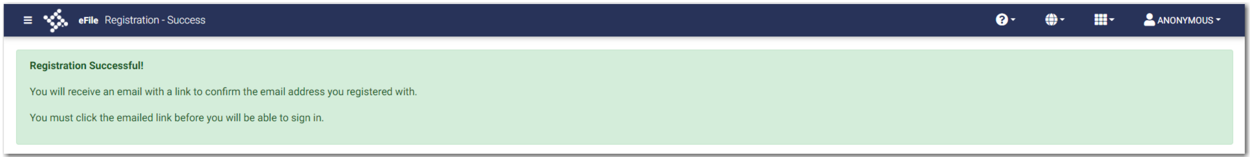



**Figure 3.6 – Registration - Success Page**

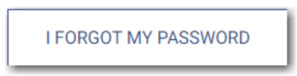
7. Check your inbox for the activation email from Odyssey File & Serve.

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

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

# Resetting Your Password

To reset your password:

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

.

   The *Reset Password* window is displayed.

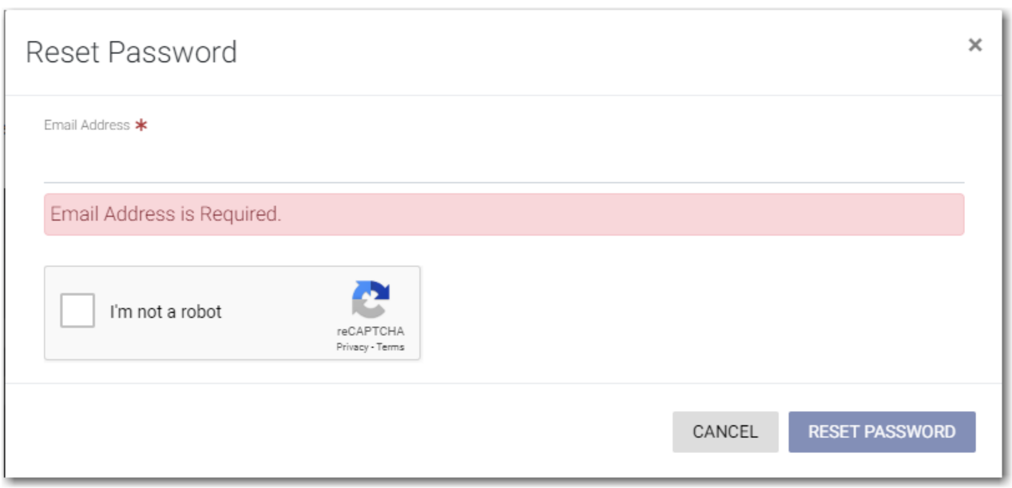



**Figure 3.7 – Reset Password Window**

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

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

4. Click the requested images, and then click 

.

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

5. After selecting the correct images, click  .

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

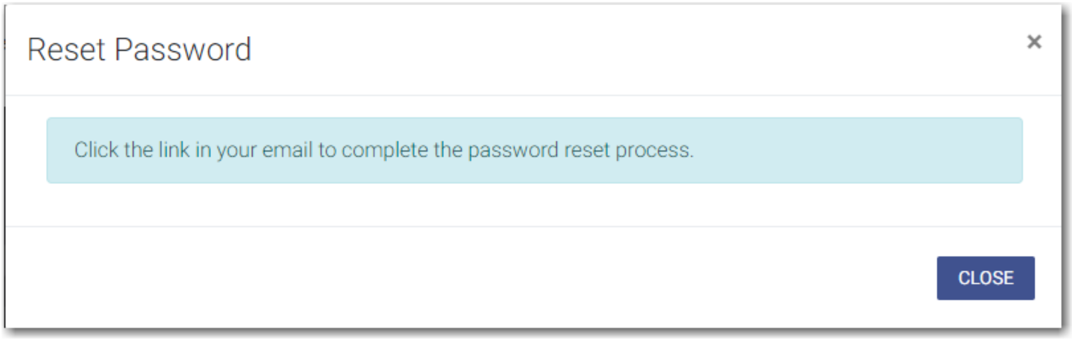
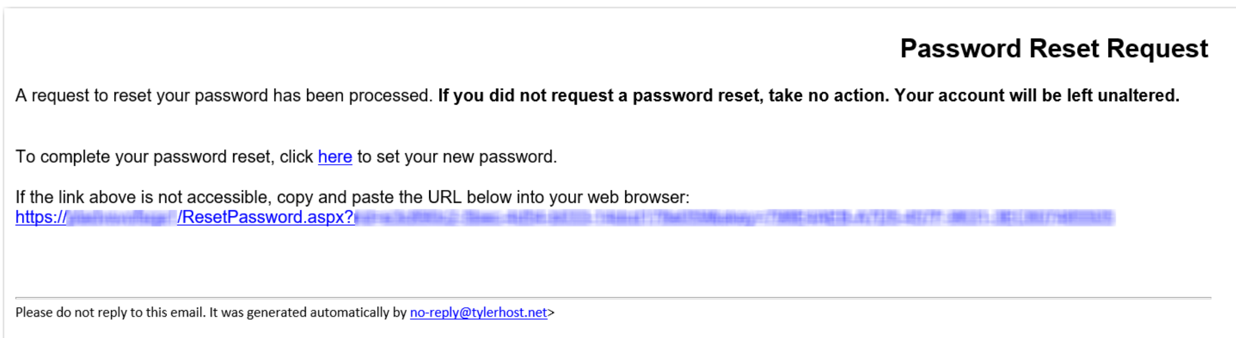



**Figure 3.8 – Reset Password Window – Complete Reset Process**

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 no-reply@tylerhost.net>

**Figure 3.9 – Example of Password Reset Request Email**

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

   You are prompted to create a new password.
9. Type a new password in the **New Password** field.

   **Note: Your password is case-sensitive and must be at least eight characters in length with at least one lowercase letter, one uppercase letter, and one number or symbol.**
10. Retype your new password in the **Repeat New Password** field.
11. Click **Change Password**.

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

# Changing the User Password

You can change your password on the *Account Settings* page.

To change your password:

1. On the Dashboard menu, click **Account Settings**.

   The *Account Settings* page is displayed.

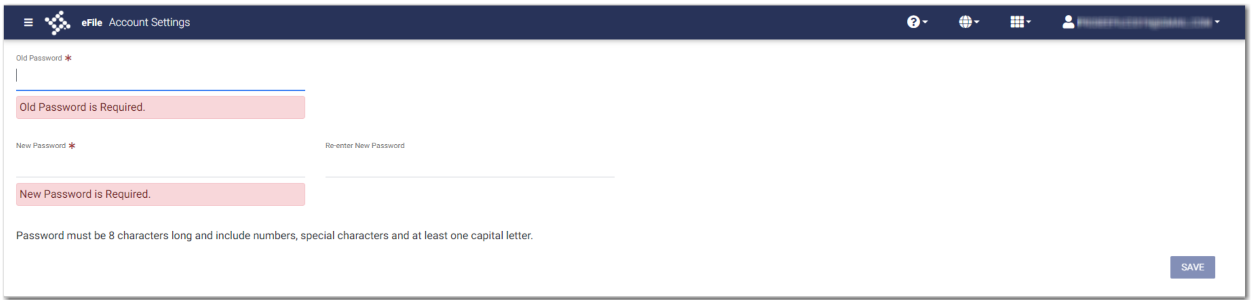



**Figure 3.10 – Account Settings Page**

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.
5. Click  .

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.

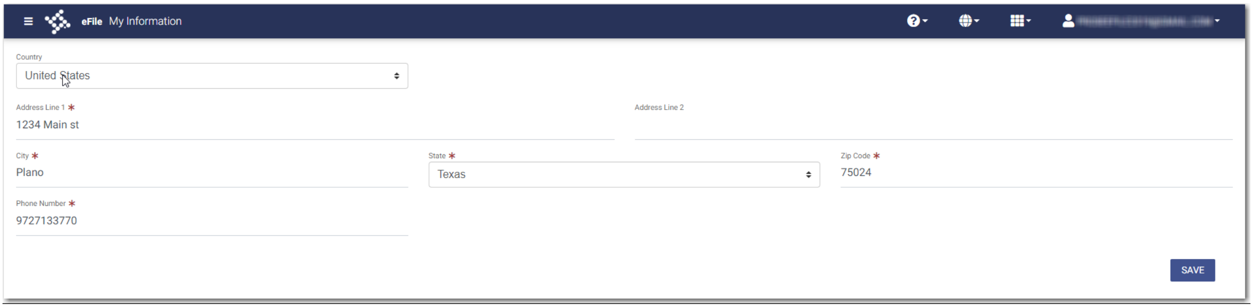



**Figure 3.11 – Sample My Information Page**

2. Update any information as needed, and then click SAVE.

# 4 Sign In and Sign Out

**Topics covered in this chapter**



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

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

**Note: Click 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 SIGN IN.
3. Type your email address and password (which is case-sensitive).

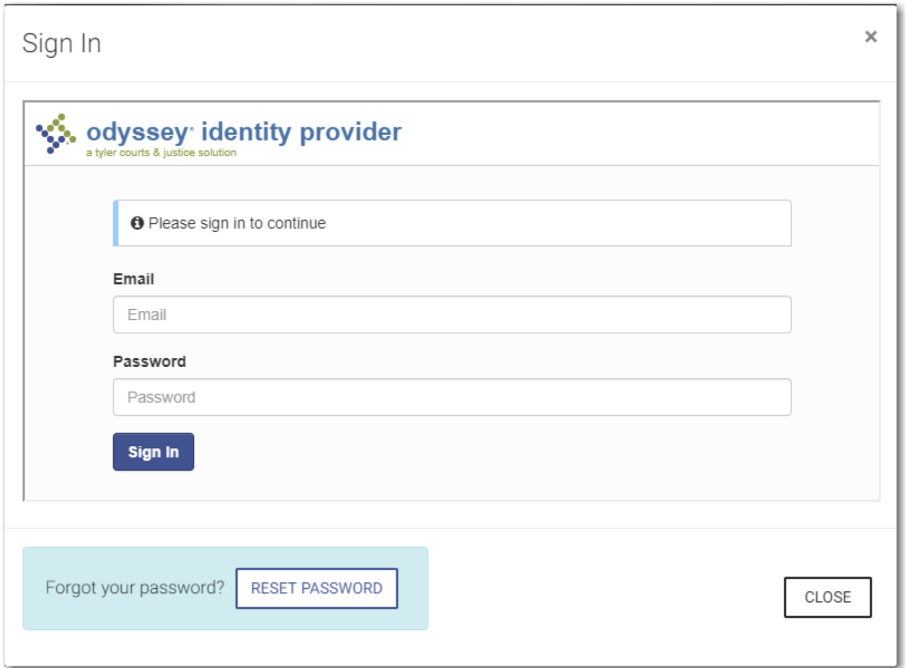



**Figure 4.1 – Sign In Page**

4. Click 

.

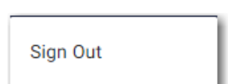
**Note: After you make several failed attempts to sign in to the system, your account is locked. You can unlock your account by clicking Forgot Password?.**

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

# Signing Out

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

To sign out of the application:

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

.

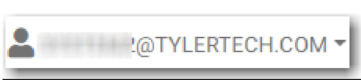



**Figure 4.2 – Sign Out Drop-Down List**

You are now signed out of the application.

# 5 Dashboard

**Topics covered in this chapter**

♦ Dashboard Page

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

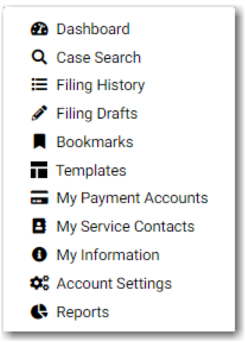



**Figure 5.1 – Dashboard**

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.

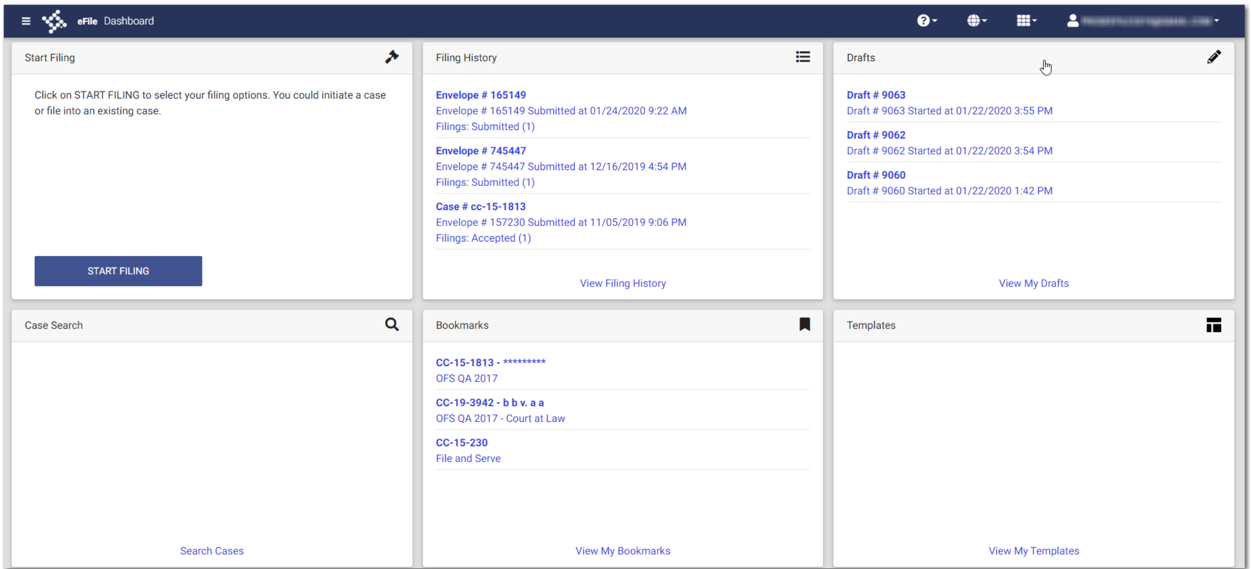



**Figure 5.2 – Dashboard Page**

### 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.

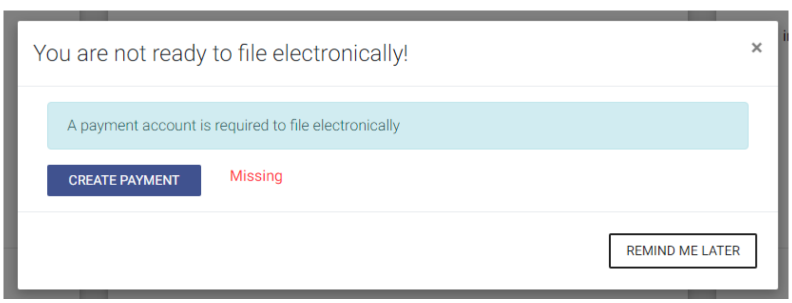
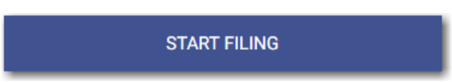



**Figure 5.3 – Warning Message**

### 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.

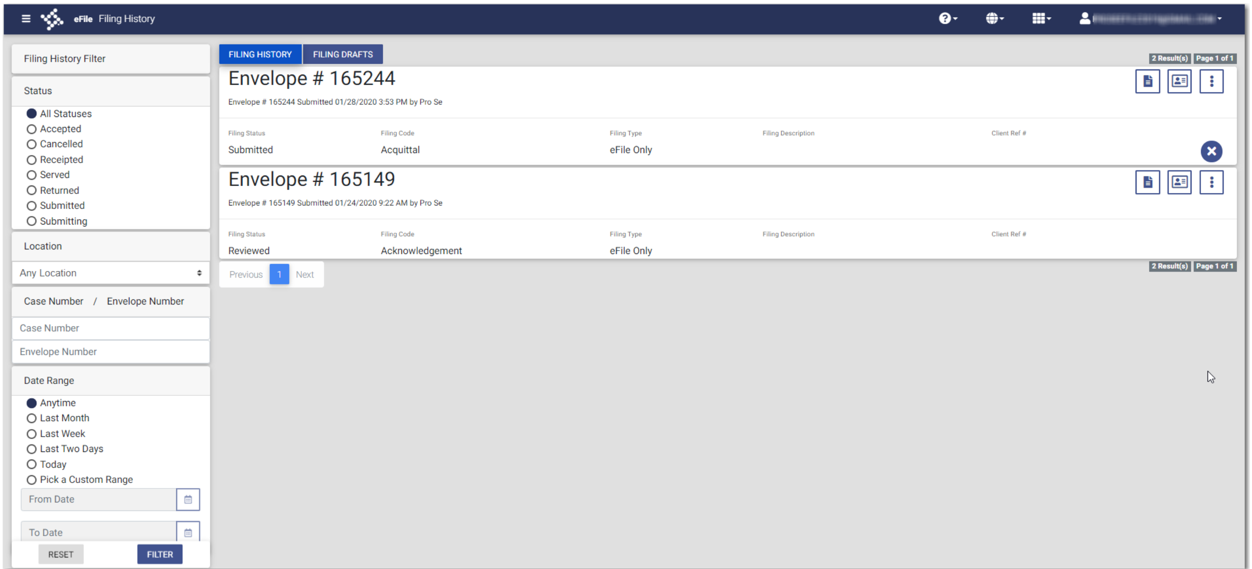



Figure 5.4 – Filing History Page

### 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.

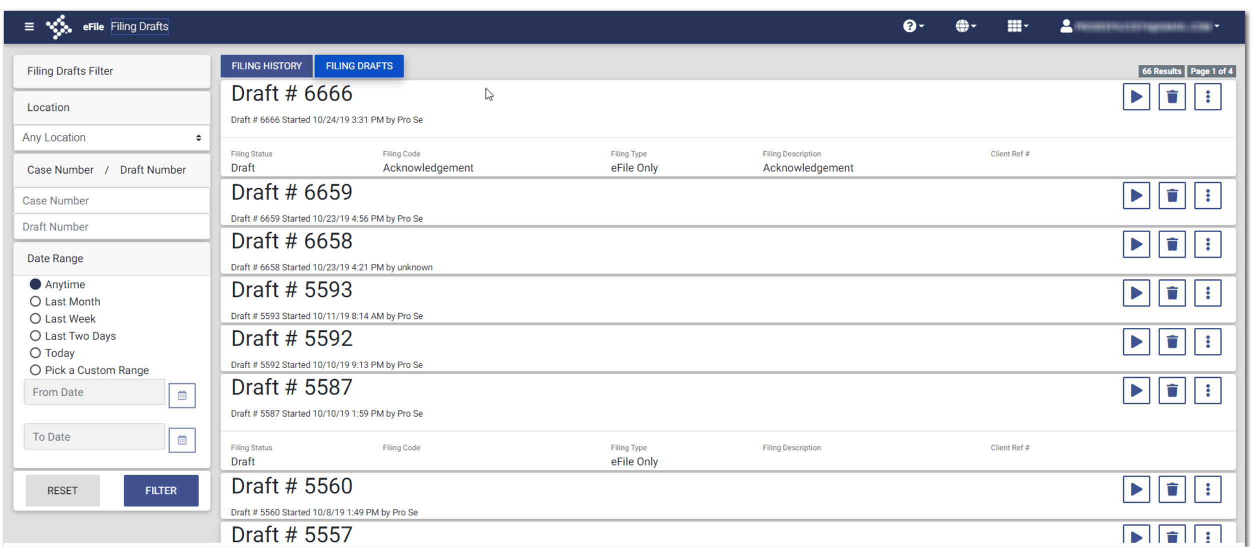



Figure 5.5 – Filing Drafts Page

### 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.

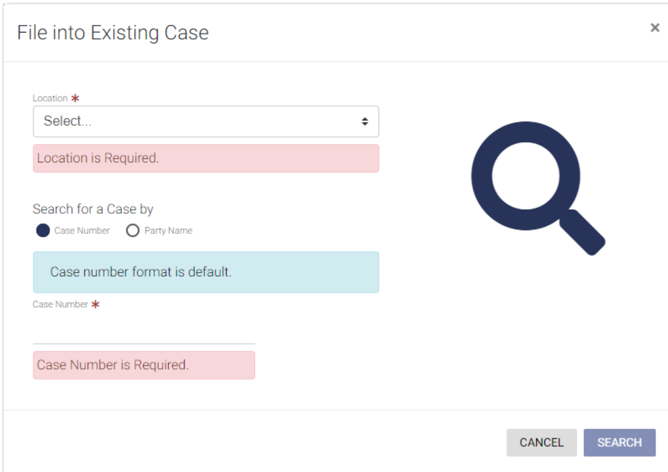



**Figure 5.6 – File into Existing Case Window—Includes Party Name Option**

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

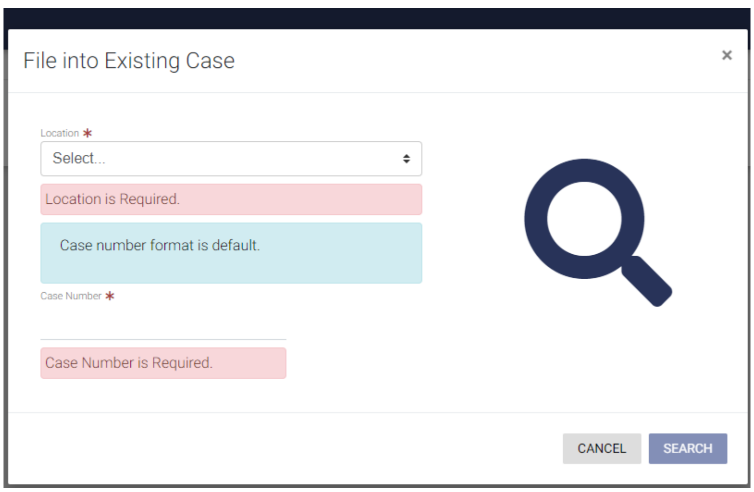
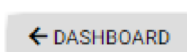



**Figure 5.7 – File into Existing Case Window—Excludes Party Name Option**

If your search does not produce any results, click 

to return to the *Dashboard* page.

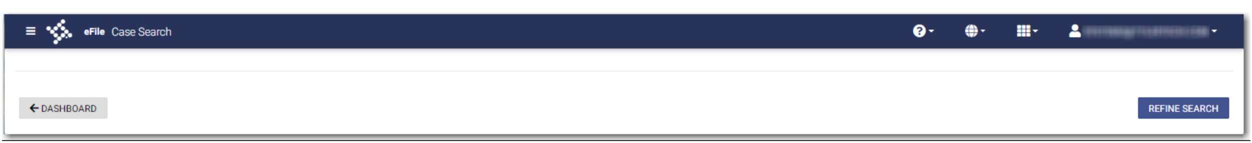



**Figure 5.8 – Case Search Page with No Search Results Displayed**

### Bookmarks

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

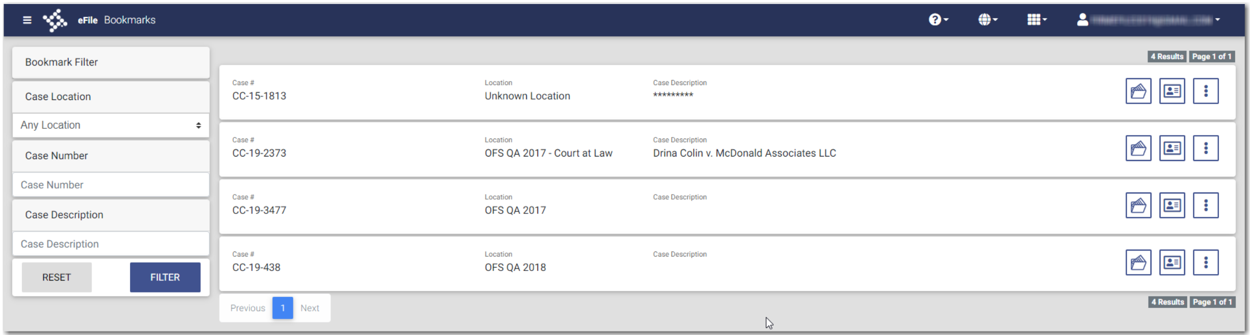



**Figure 5.9 – Sample Bookmarks Page**

## Templates

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

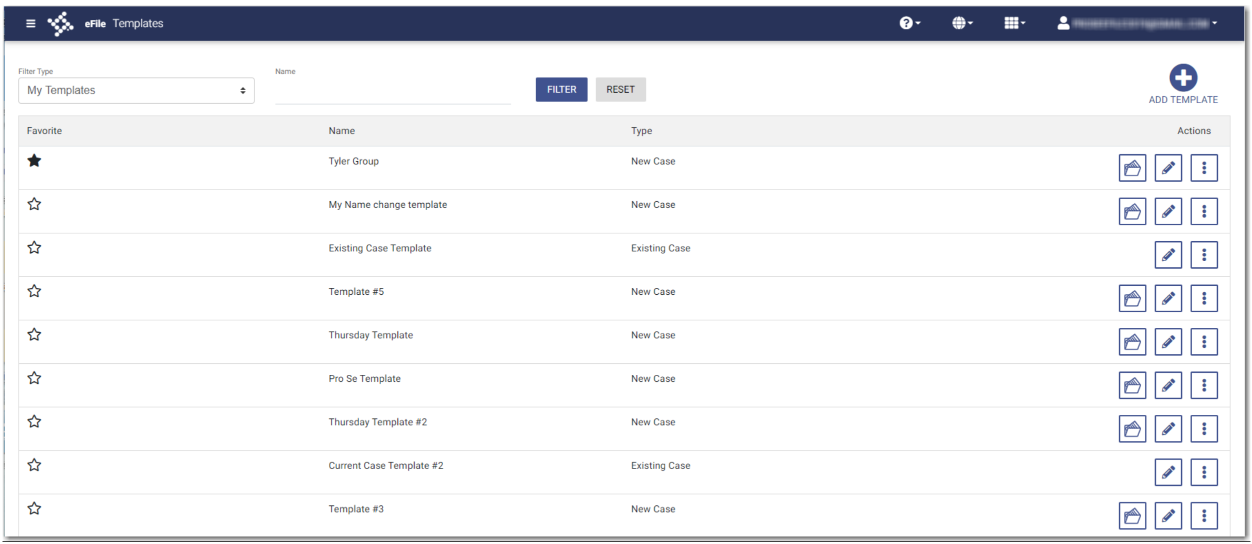



**Figure 5.10 – Templates Page**

# 6 Payment Accounts

**Topics covered in this chapter**



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.

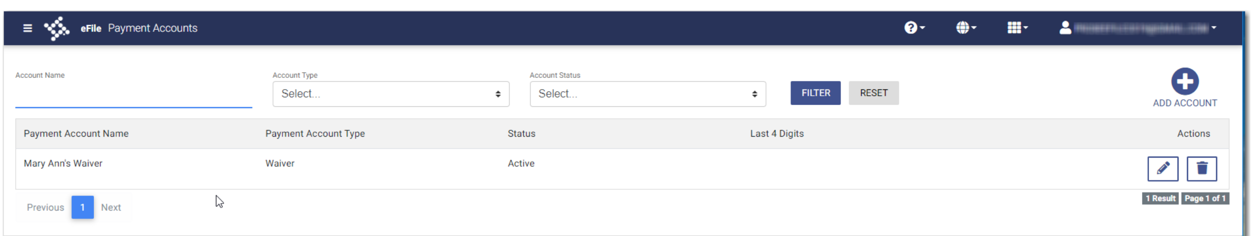
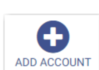



**Figure 6.1 – Payment Accounts Page**

2. Click  .


   A new pane is displayed.

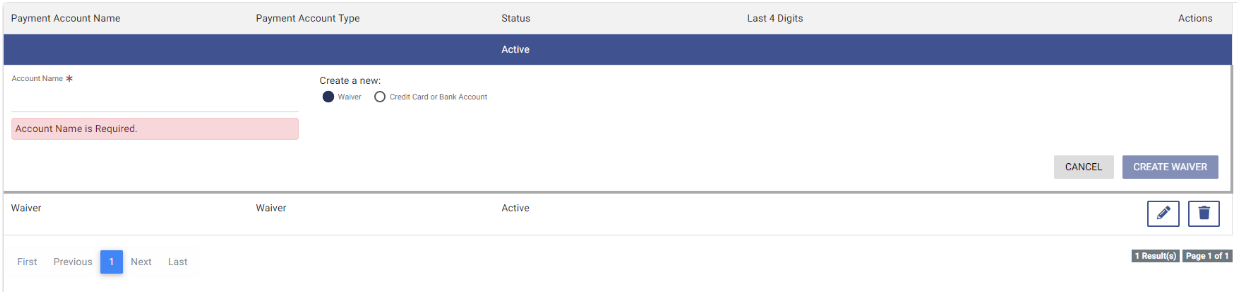



**Figure 6.2 – New Payment Account Window**

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.

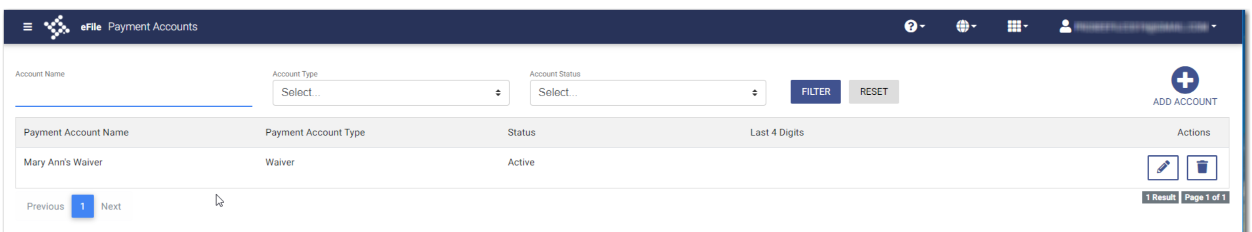
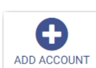



**Figure 6.3 – Payment Accounts Page**

2. Click  .


   A new pane is displayed.

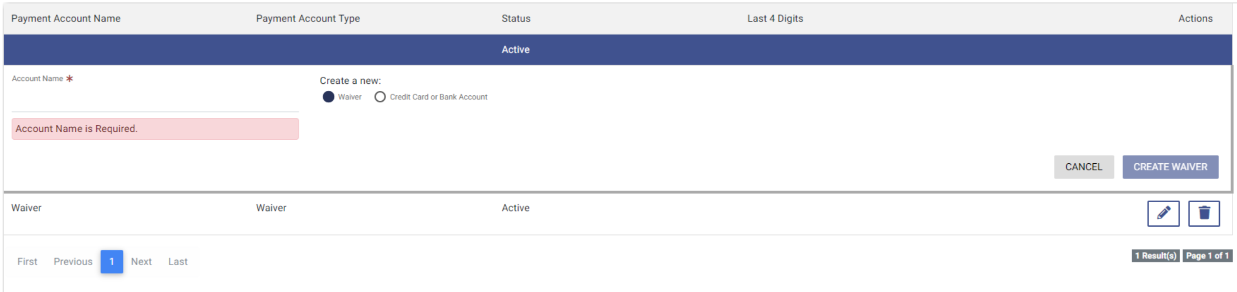



**Figure 6.4 – New Payment Account Window**

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.

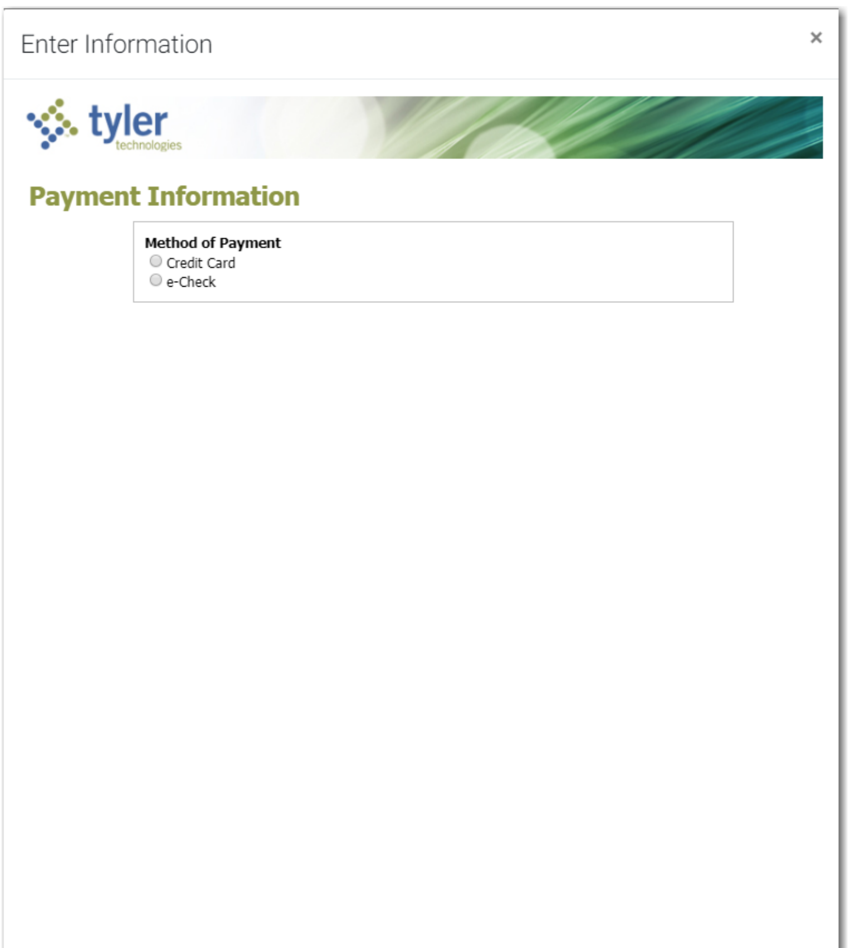



**Figure 6.5 – Enter Information Window**

5. Select the **Credit Card** option.

   The Payment Information pane is displayed.

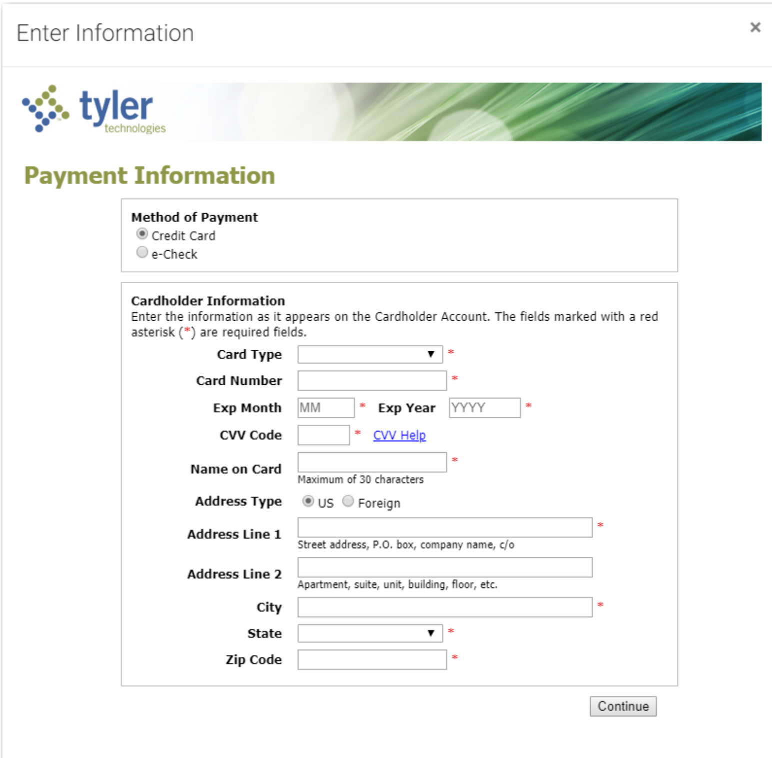



**Figure 6.6 – Payment Information Pane**

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 **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.
13. After completing all of the required fields, click Continue.

    The Verify Billing Information pane is displayed.

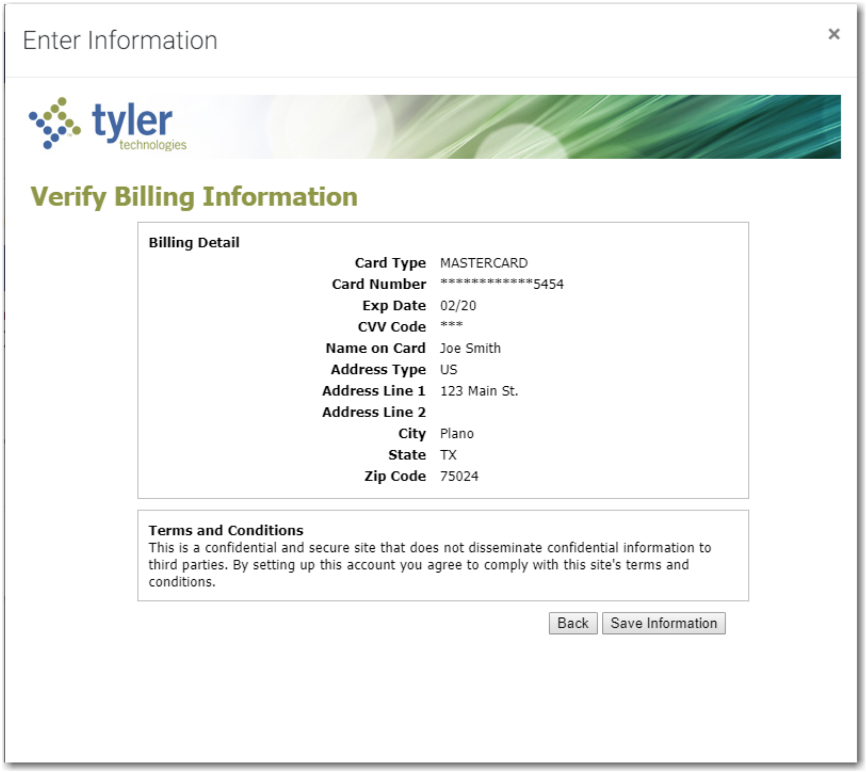



**Figure 6.7 – Verify Billing Information Pane**

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

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

# Adding an E-Check Payment Account

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

To set up an e-check payment account:

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

   The *Payment Accounts* page is displayed.

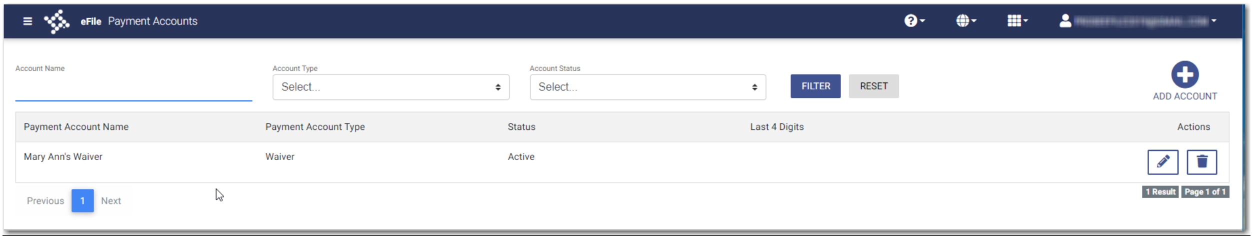



**Figure 6.8 – Payment Accounts Page**

2. Click .


   A new pane is displayed.

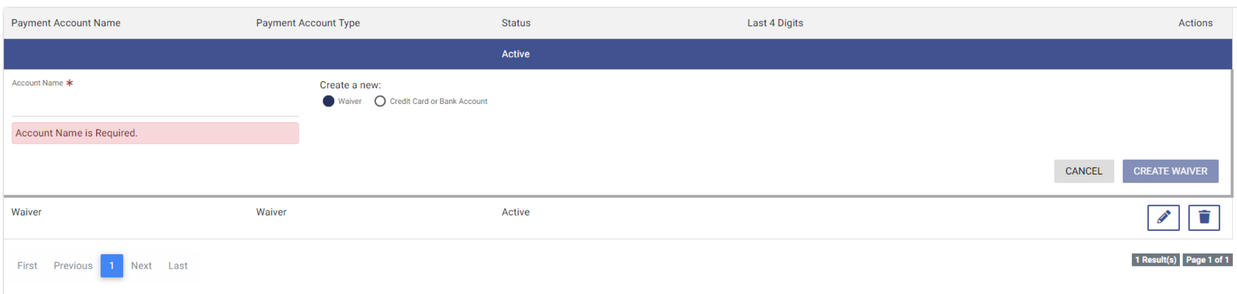



**Figure 6.9 – New Payment Account Window**

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.

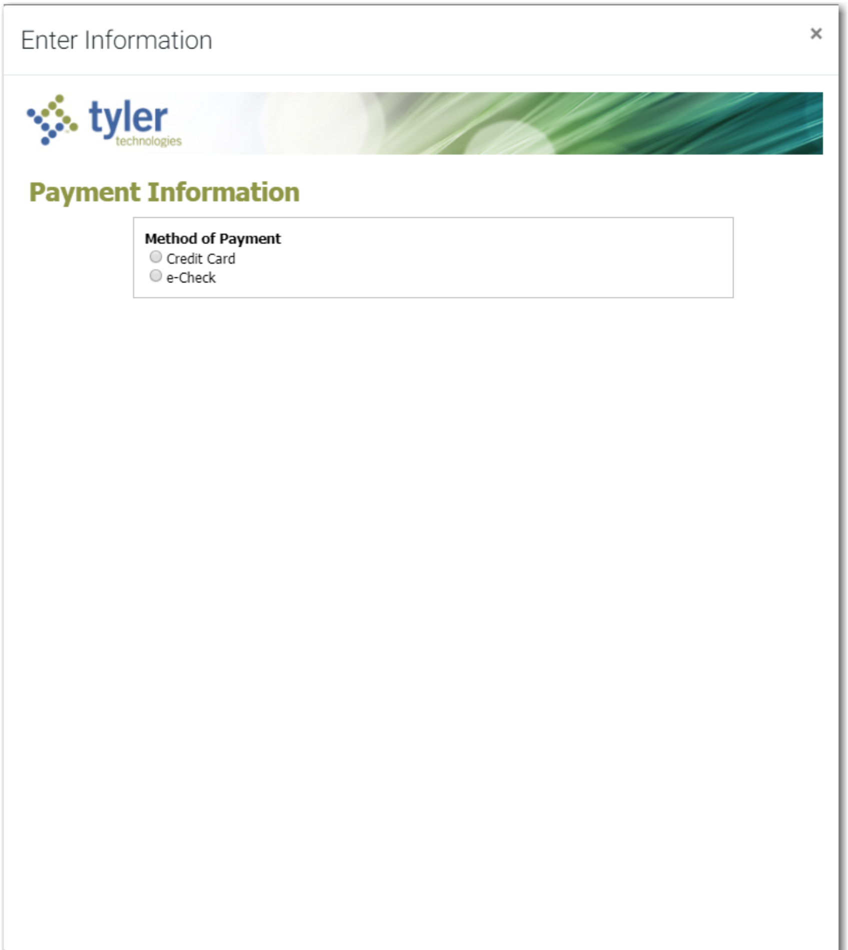



**Figure 6.10 – Enter Information Window**

5. Select the **e-Check** option.

   The Payment Information pane is displayed.

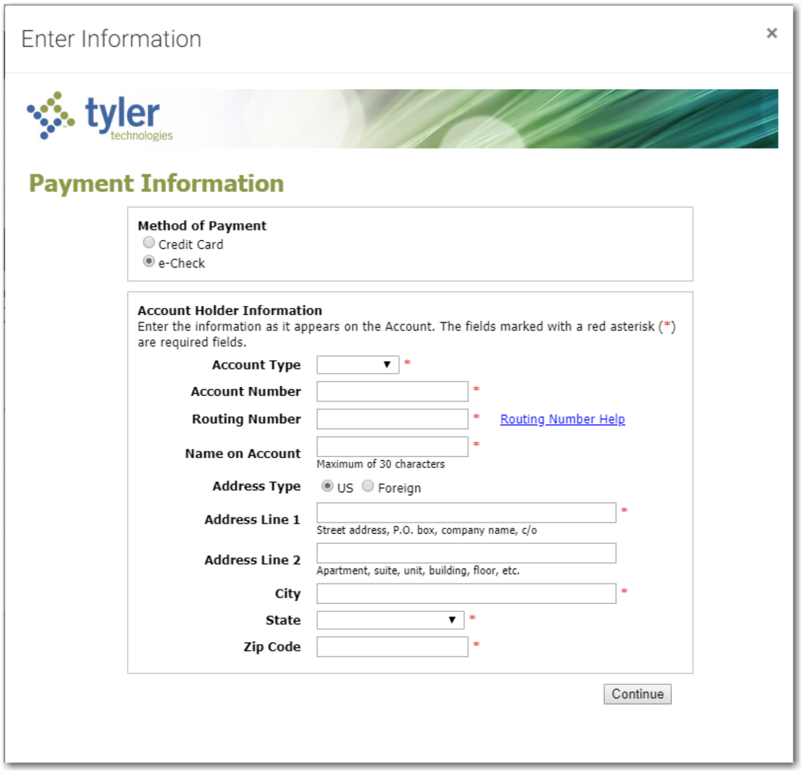



**Figure 6.11 – Payment Information Pane**

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.
11. After completing all of the required fields, click Continue.

    The Verify Billing Information pane is displayed.

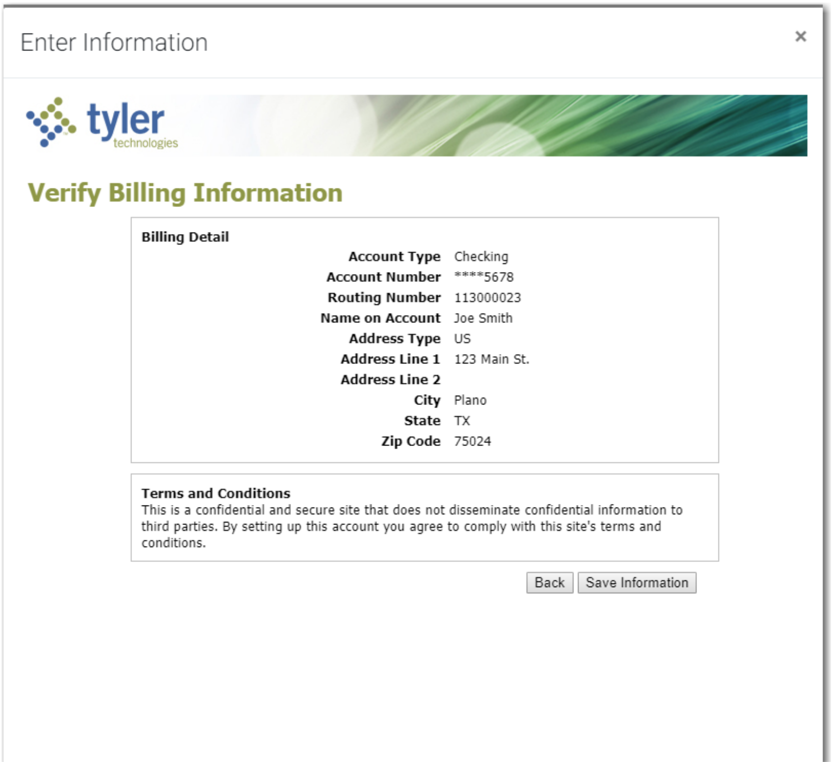



**Figure 6.12 – Verify Billing Information Pane**

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

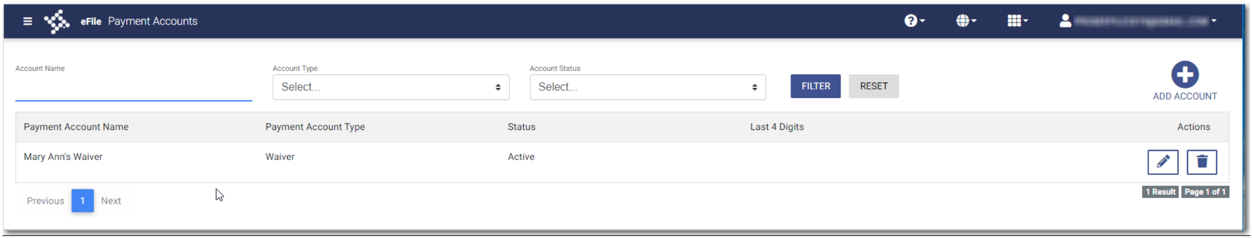



**Figure 6.13 – Payment Accounts Page**

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

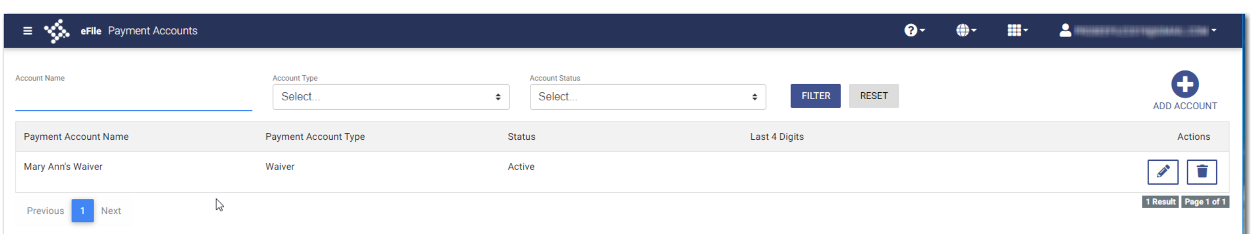



**Figure 6.14 – Payment Accounts Page**

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

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

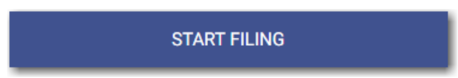
3. Click OK to delete the account, or click Cancel to cancel the action.

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

# 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

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

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

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

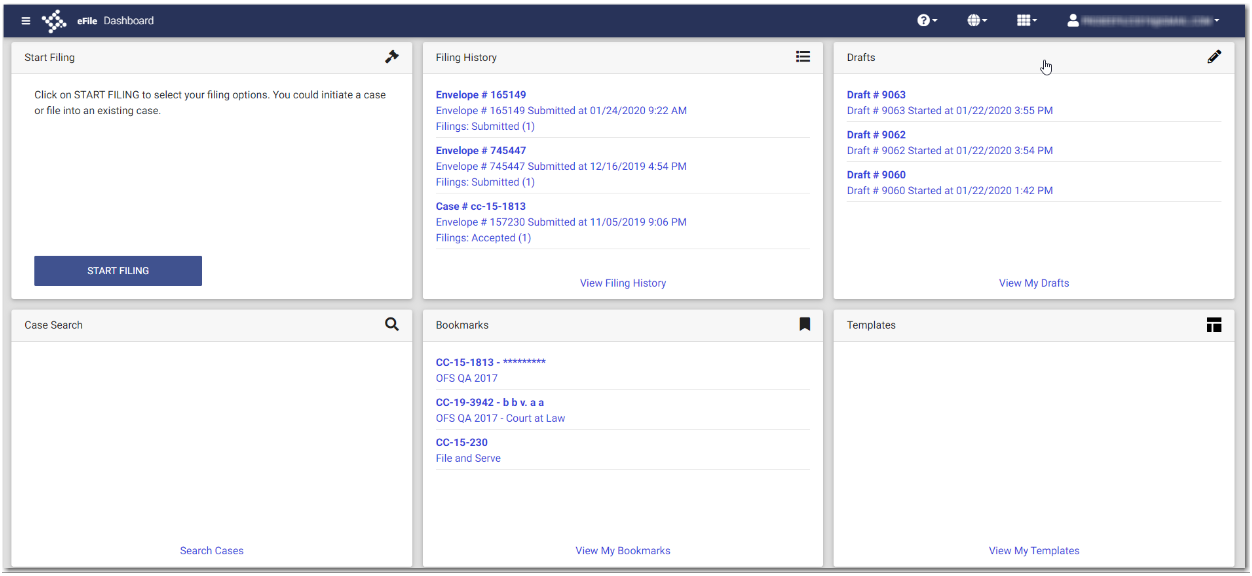
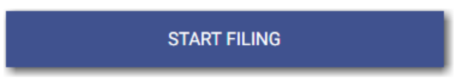



**Figure 7.1 – Dashboard Page**

# 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.

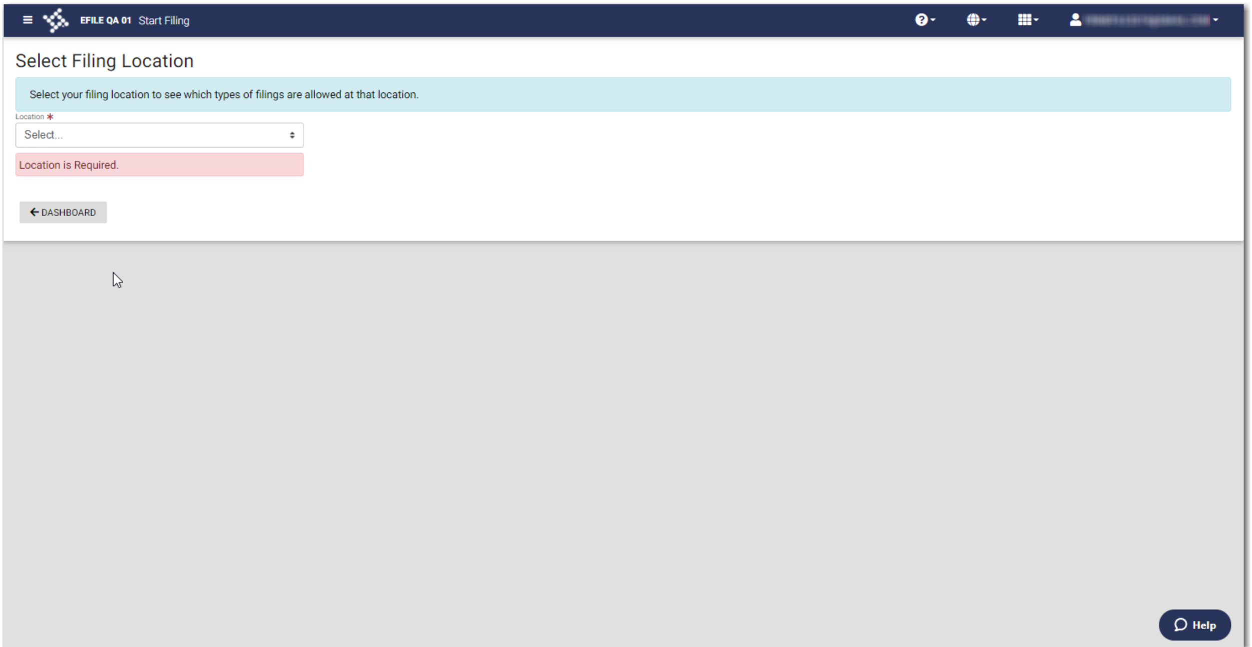



**Figure 7.2 – Start Filing Page**

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

   The New Case and the Existing Case panes are displayed.

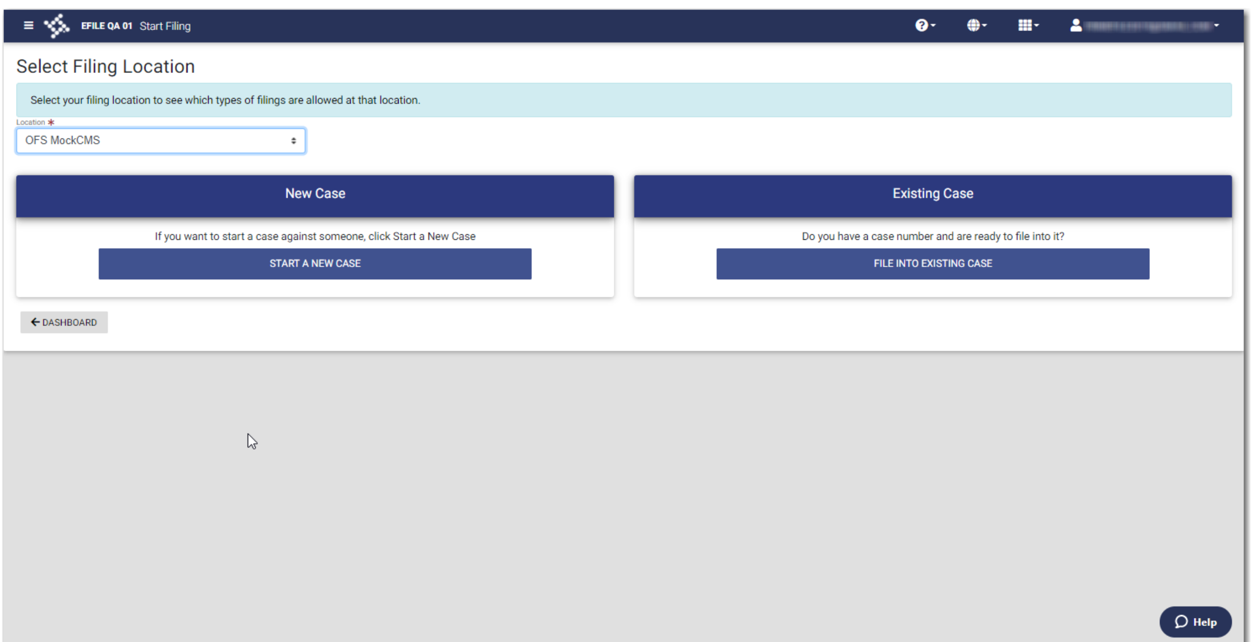



**Figure 7.3 – Start Filing Page with Case Panes Displayed**

3. Click 


   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 BROWSE 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 ℹ ▾ to view the case number or draft number.**

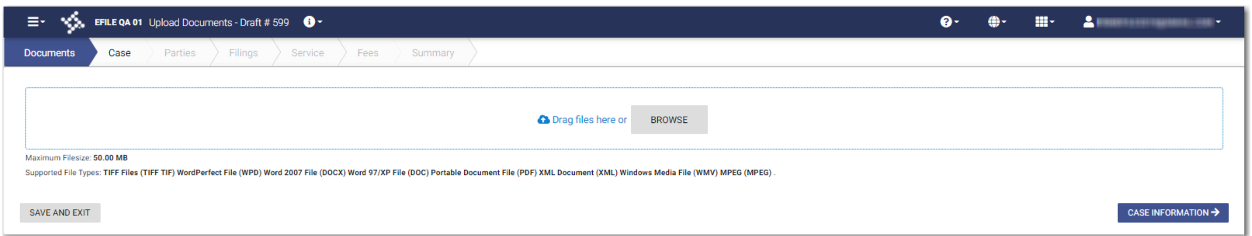



**Figure 7.4 – Upload Documents Page**

2. Select each document to be uploaded.
3. Click 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.**

# Entering Case Information

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

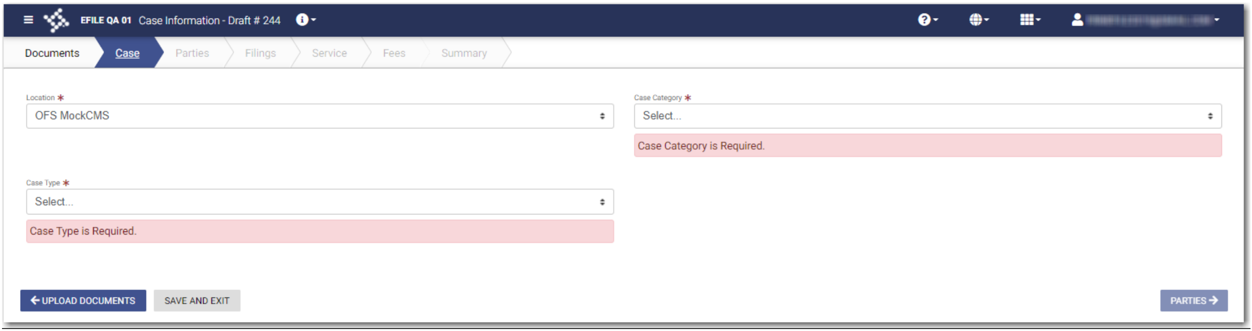



**Figure 7.5 – Case Information Page**

**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  to view the case number or draft number.**

To enter case information:

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

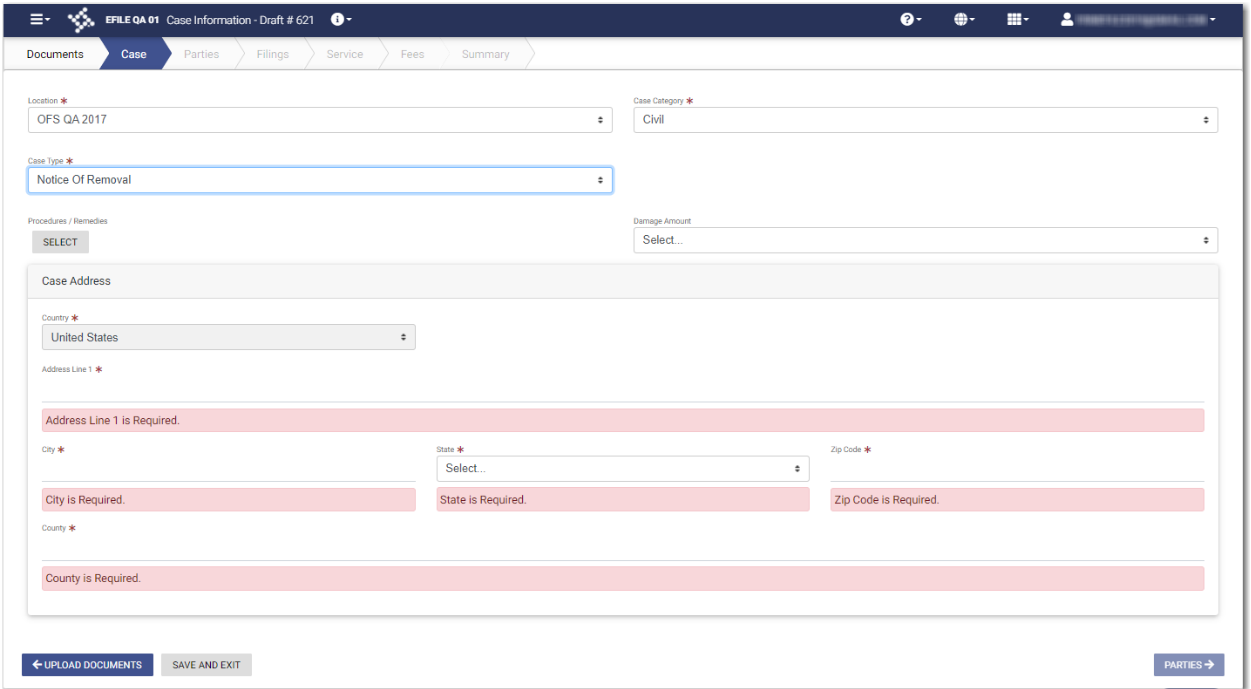
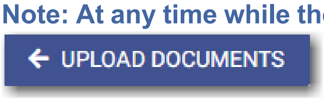



**Figure 7.6 – Sample Case Information Page—Case Address Pane Blank**

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

**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.

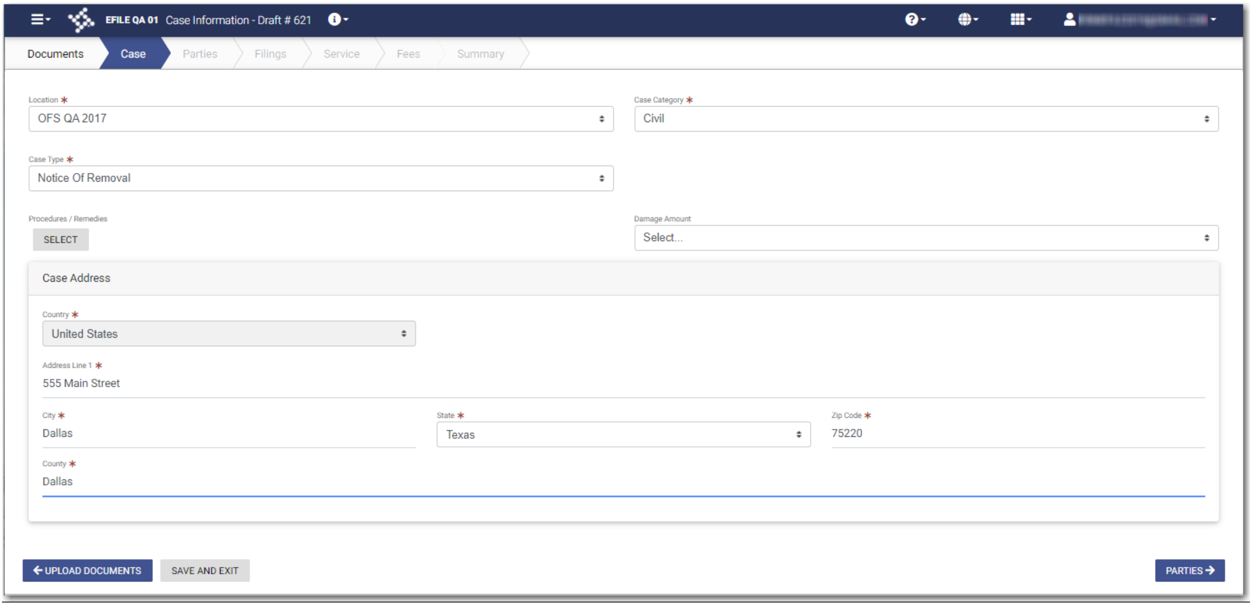



**Figure 7.7 – Sample Case Information Page—Case Address Pane Completed**

4. Click **PARTIES →** to save your work and continue, or click **SAVE AND EXIT** 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.

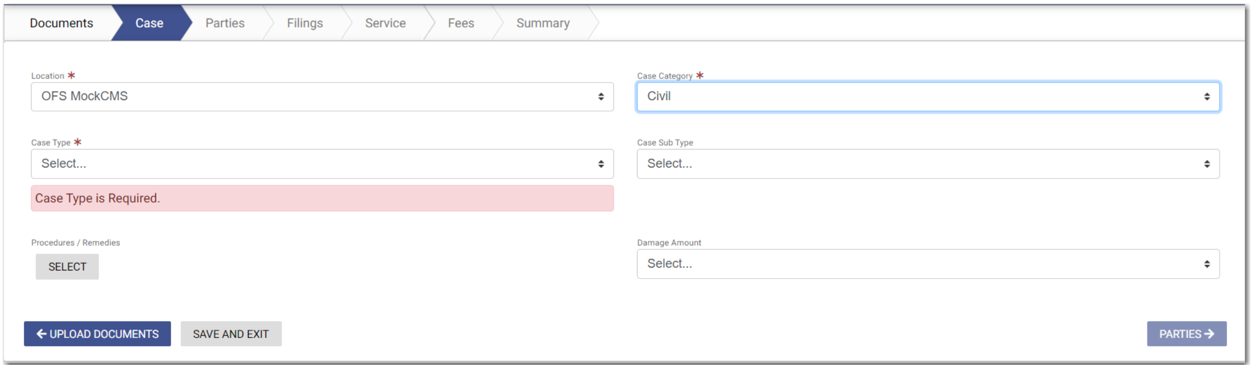



**Figure 7.8 – Case Information Page**

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.
4. Click SELECT.

   The *Select Procedures / Remedies* window is displayed.

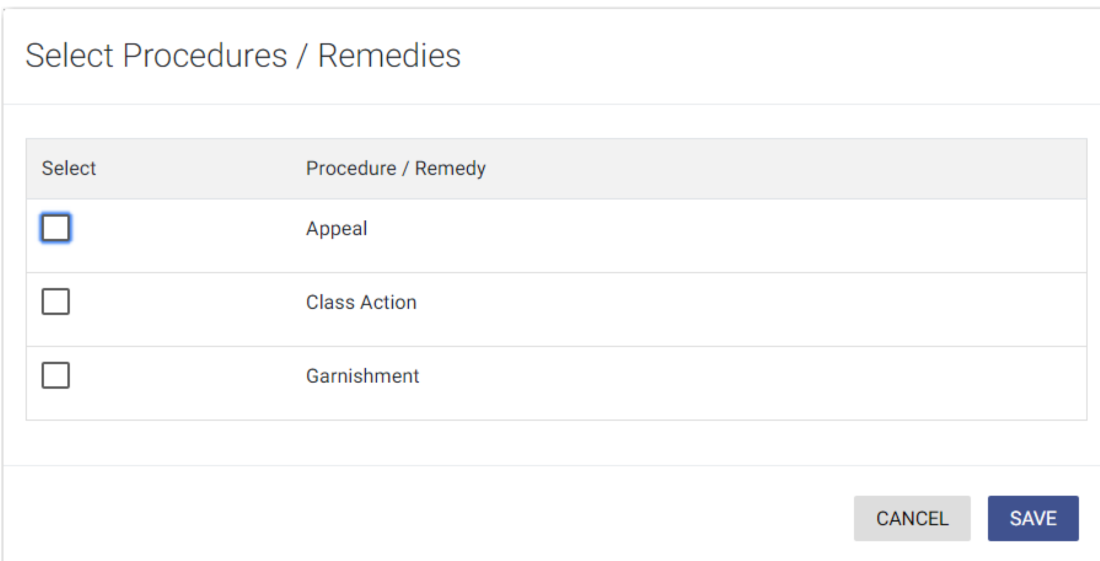



**Figure 7.9 – Select Procedures / Remedies Window**

5. Select the appropriate Procedure / Remedy, and then click SAVE.
6. Select the amount of damages you are seeking from the **Damage Amount** drop-down list.

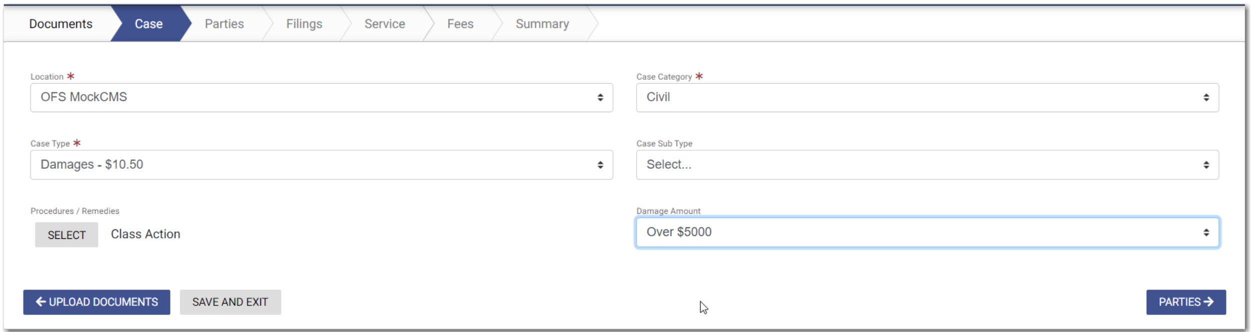



**Figure 7.10 – Sample Completed Case Information Page**

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

# Filing a New Case with Case Cross References

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

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

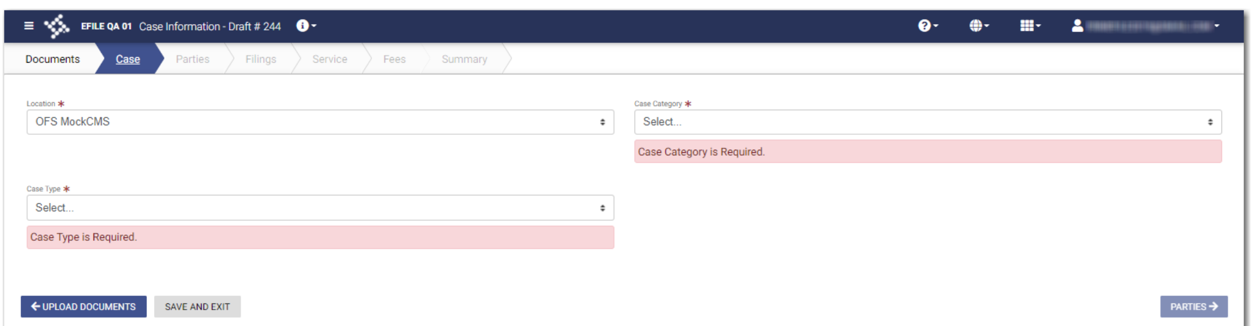



**Figure 7.11 – Case Information Page**

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.

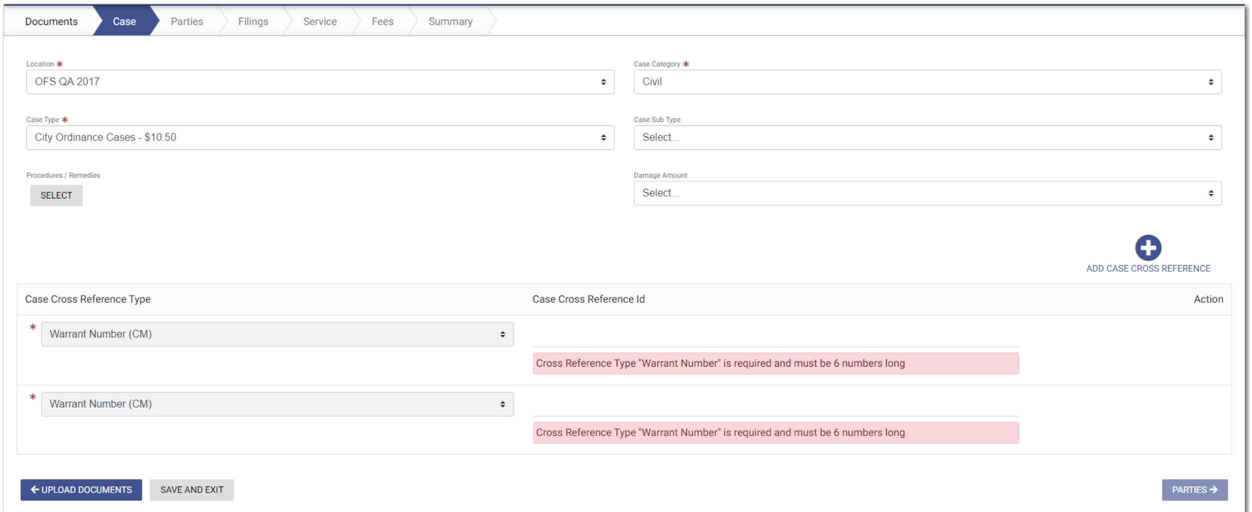



**Figure 7.12 – Sample Case Information Page with the Case Cross Reference Type Section Displayed**

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 six-digit case cross reference number in the **Case Cross Reference Id** field.

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

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

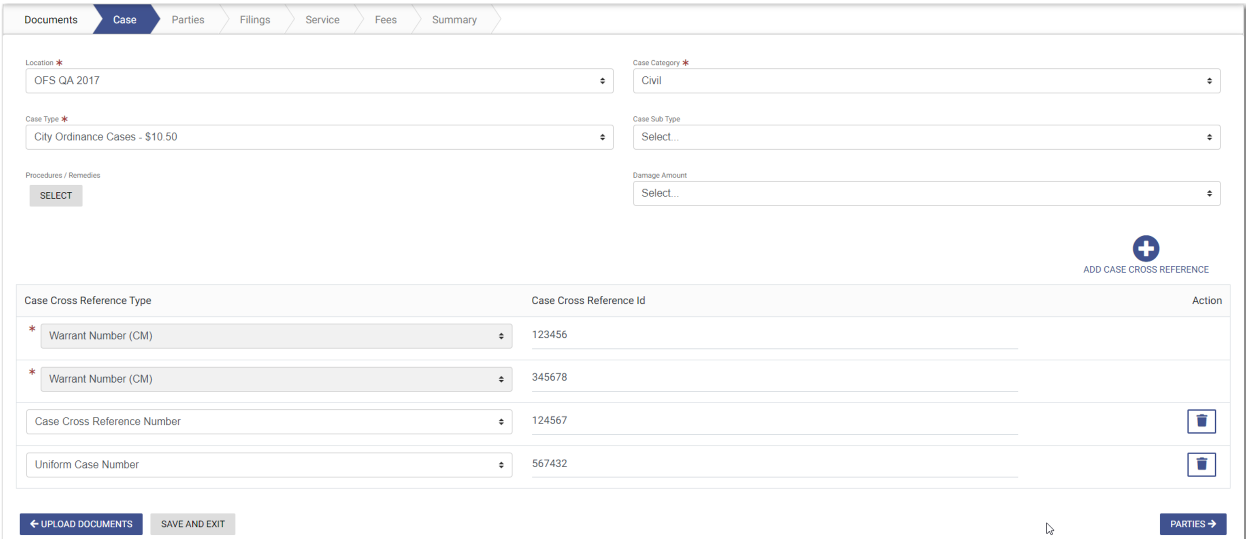
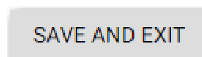



**Figure 7.13 – Example of a Case Information Page with Case Cross Reference Numbers Added**

9. Click 

to save your work and to continue, or click 

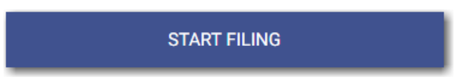
to save your work and to exit the filing.

# 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:

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

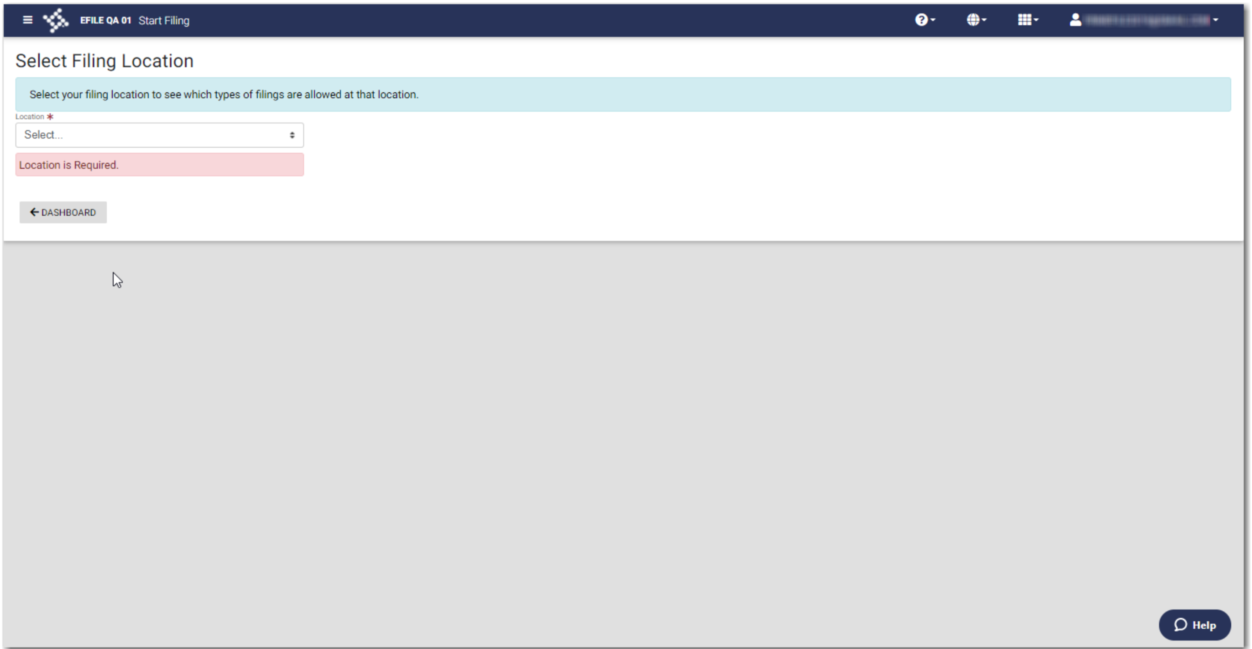



**Figure 7.14 – Start Filing Page**

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

   The New Case and the Existing Case panes are displayed.

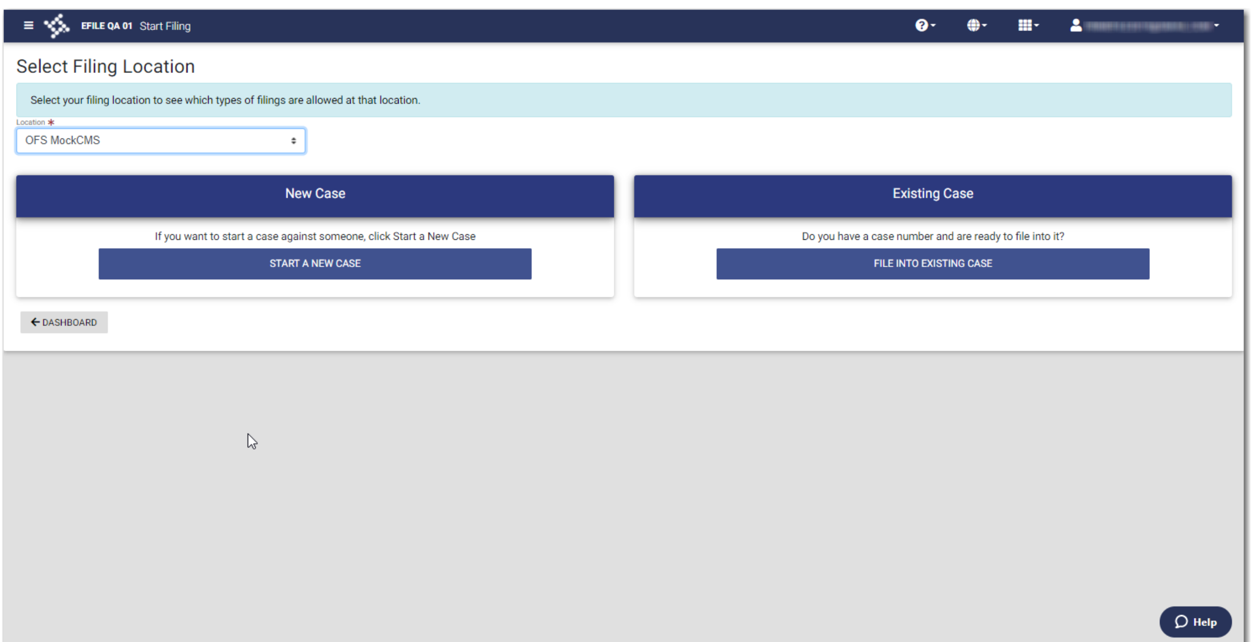



**Figure 7.15 – Start Filing Page with Case Panes Displayed**

3. Click 


   The *Upload Documents* page is displayed.

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

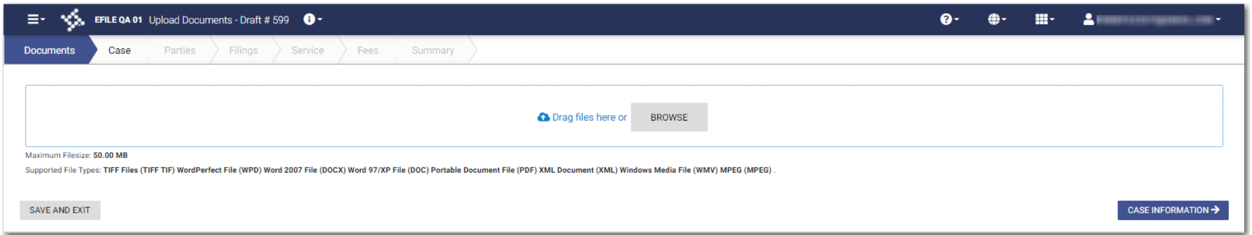



**Figure 7.16 – Upload Documents Page**

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

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

5. Select each document to be uploaded.

6. Click CASE INFORMATION → 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.

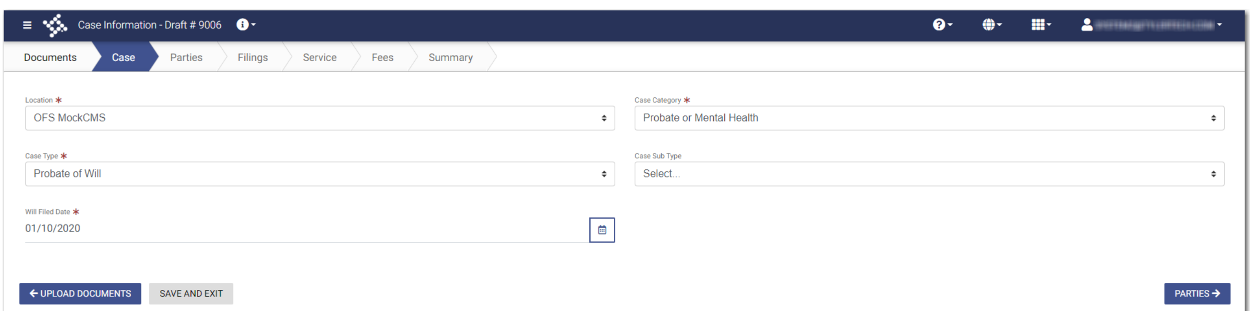



**Figure 7.17 – Example of the Will Filed Field on the Case Information Page**

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.**

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

# Entering Party Details

Each case requires a party type.

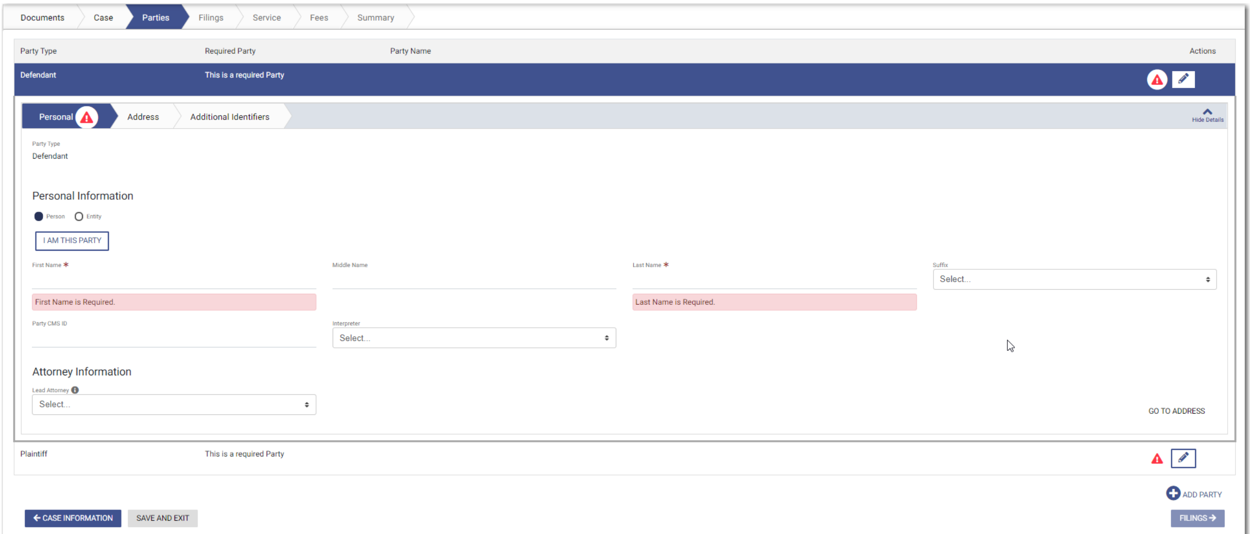



**Figure 7.18 – Personal Tab on the Parties Page**

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

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

1. On the **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, click I AM THIS 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.
6. Click GO TO ADDRESS to enter the address information for the first party.

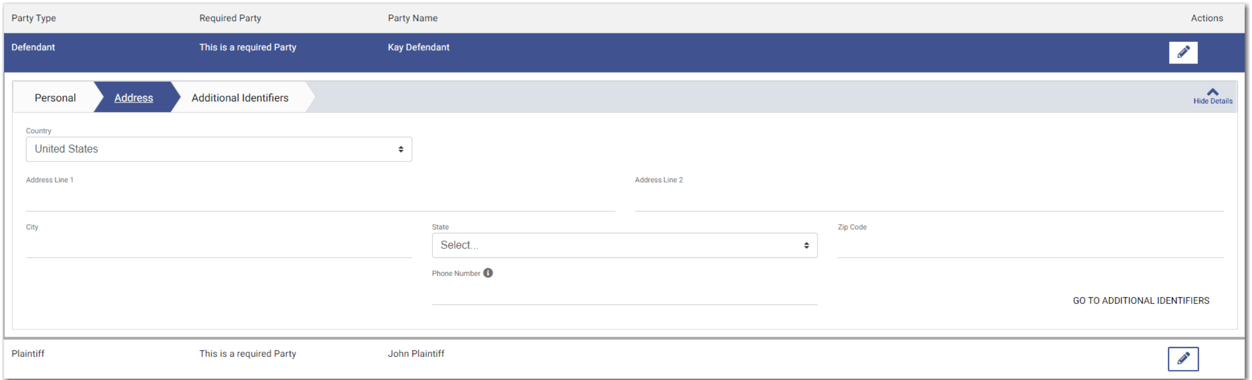



**Figure 7.19 – Address Tab on the Parties Page**

7. Enter the country, address, city, state, ZIP code, and phone number for the first party.
8. Click GO TO ADDITIONAL IDENTIFIERS to add more information for the specified party.

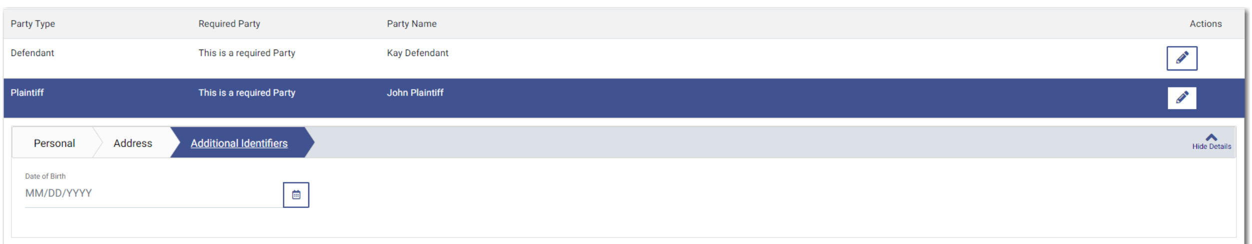



**Figure 7.20 – Additional Identifiers Tab on the Parties Page**

9. Type the party's date of birth in the **Date of Birth** field, or click [calendar icon] to select the date from the calendar.
10. Click [edit icon] to enter information for the other required party.
11. Complete all of the required fields for the second party.
12. If you have another party to add to the case, click ADD PARTY. Continue to add parties until all parties have been added to the case.
13. Click FILINGS → to save your work and to continue.

**Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Dashboard* page. In the Drafts pane, click View My Drafts. Locate the specified draft, and then click [play icon].**

# 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.**

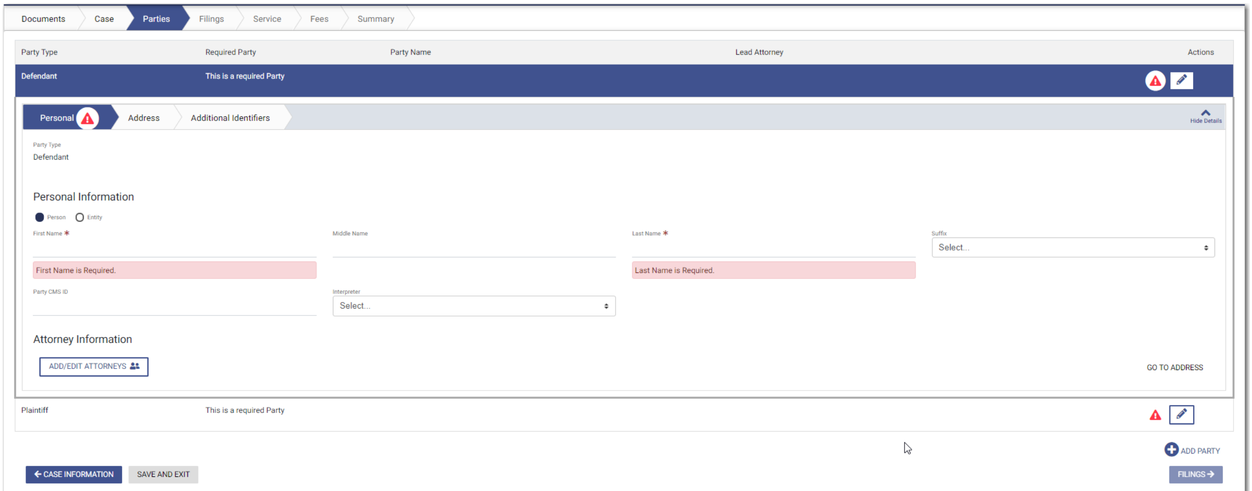
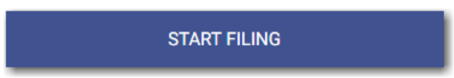



**Figure 7.21 – Example of the Personal Tab on a Parties Page**

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

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

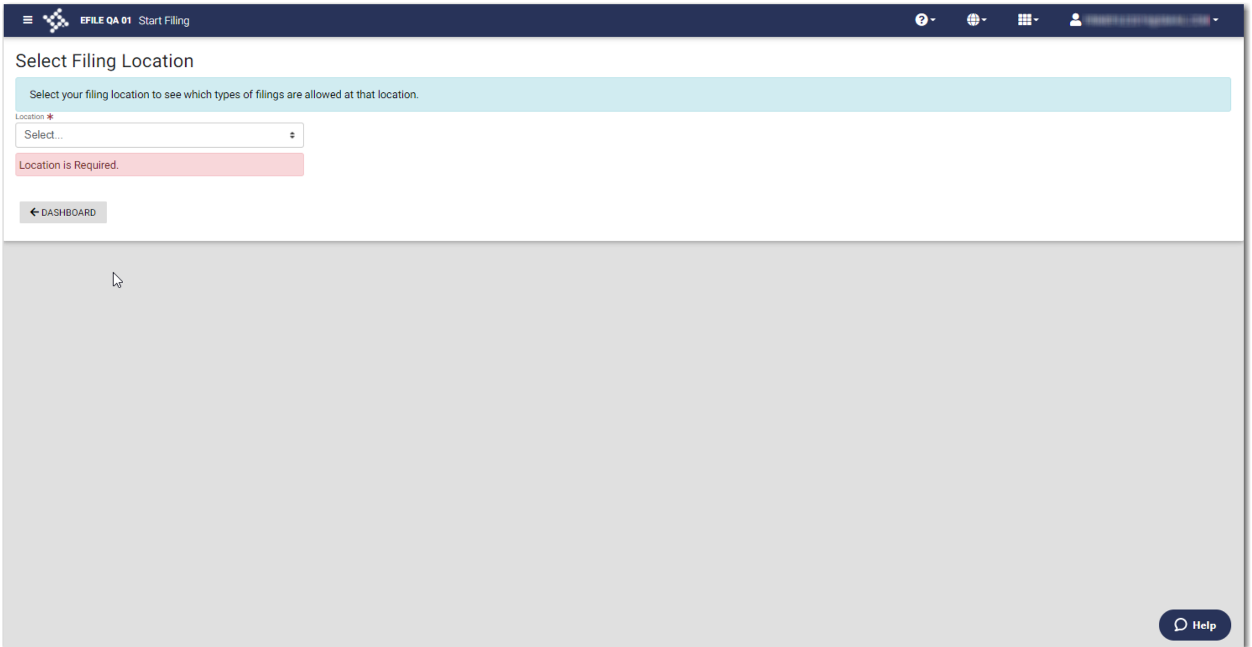



Figure 7.22 – Start Filing Page

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

   The New Case and the Existing Case panes are displayed.

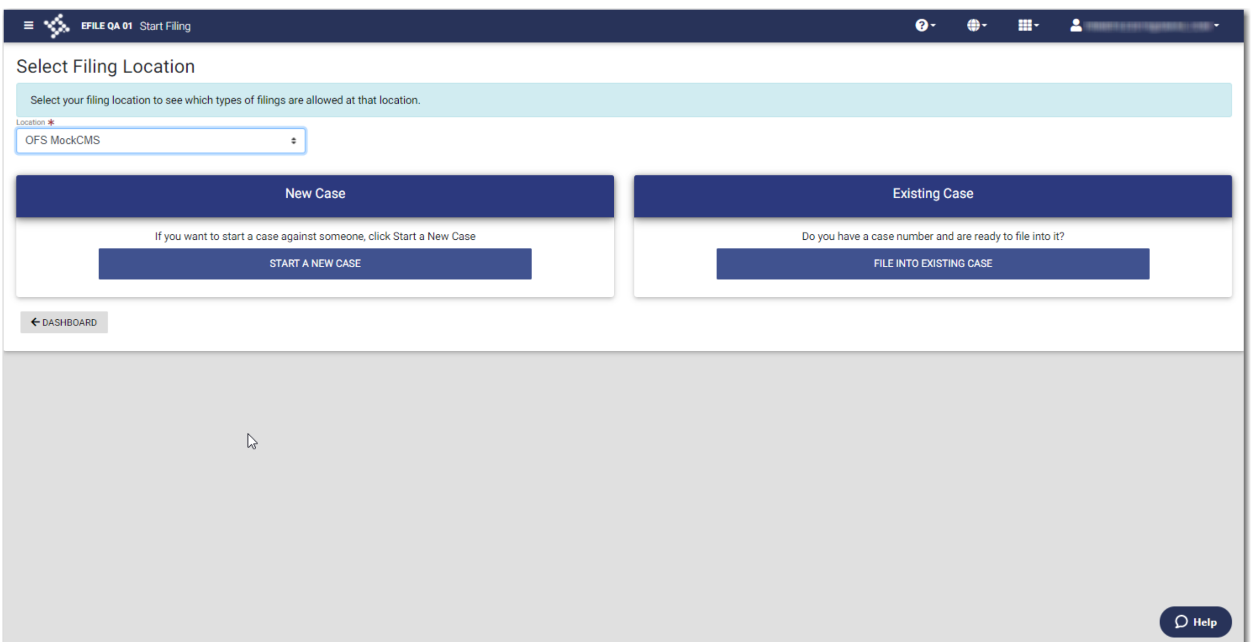



Figure 7.23 – Start Filing Page with Case Panes Displayed

3. Click 


   The *Upload Documents* page is displayed.

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

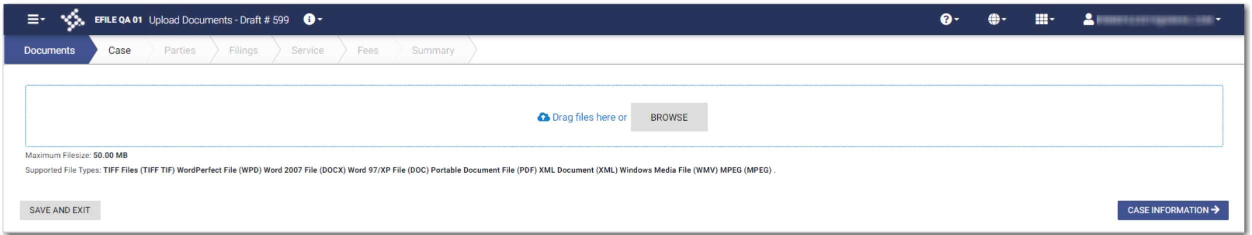



**Figure 7.24 – Upload Documents Page**

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

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

5. Select each document to be uploaded.

6. Click CASE INFORMATION 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 PARTIES .

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.

12. Click ADD/EDIT ATTORNEYS to select the filing attorney.

    The *Attorneys* window is displayed.

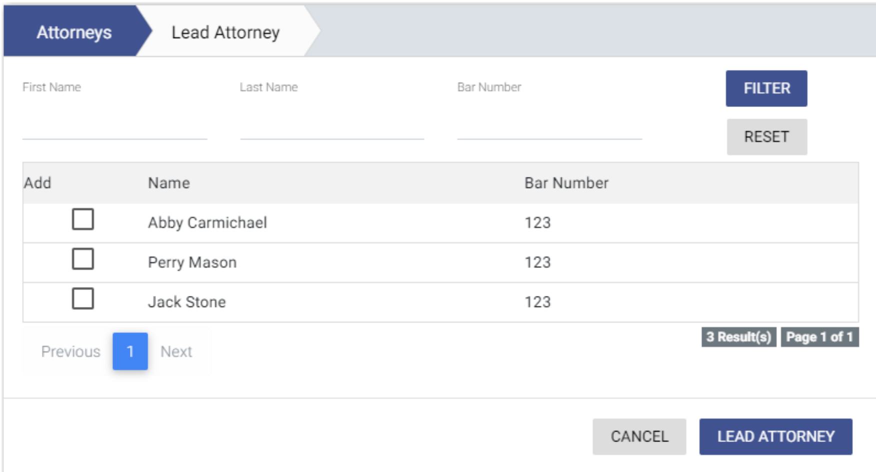



Figure 7.25 – Attorneys Window

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.


Figure 7.26 – Lead Attorney Window

15. Click SAVE.

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

16. Click GO TO ADDRESS to enter the address information for the first party.

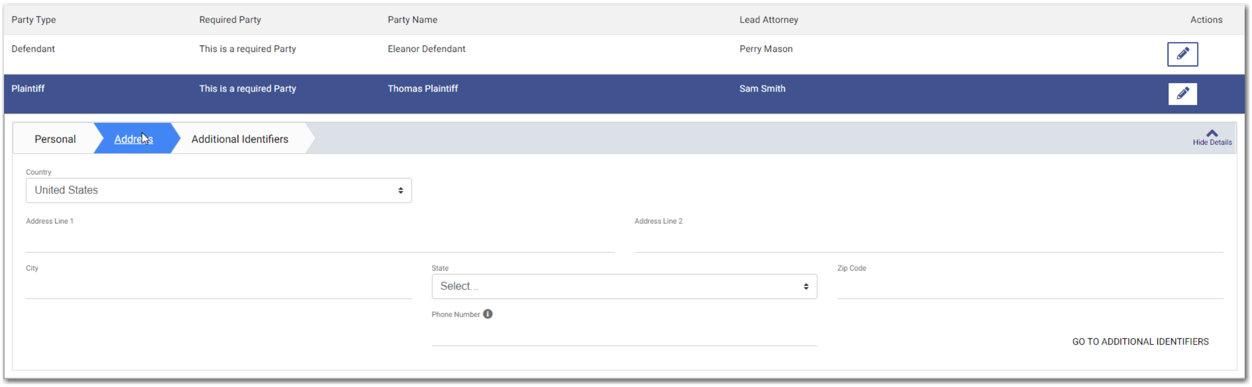
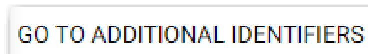



**Figure 7.27 – Example of the Address Tab on a Parties Page**

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

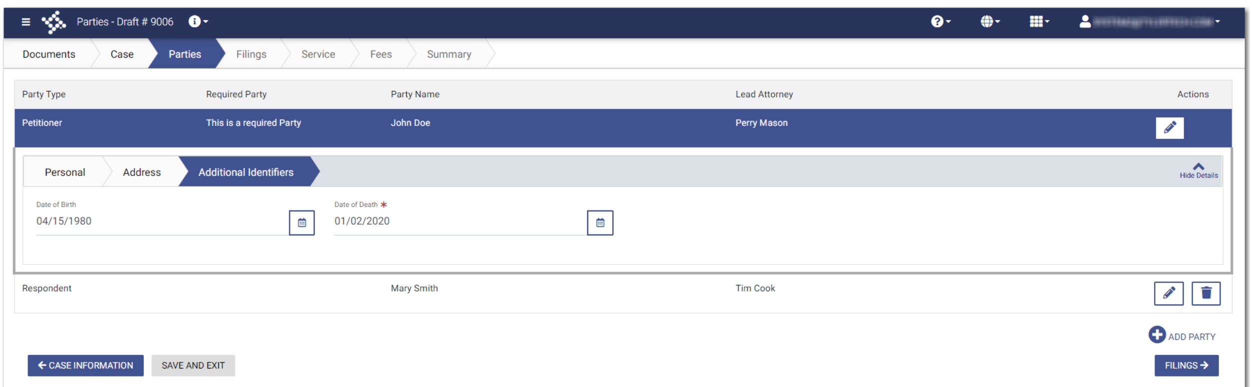
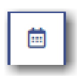




**Figure 7.28 – Example of the Additional Identifiers Tab on a Parties Page (Includes the Date of Death Field)**

18. Type a date in the **Date of Birth** field, or click  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.

23. Click  to save your work and to continue.

# Entering Filing Details

You can enter the filing details and calculate the fees associated with the filing.

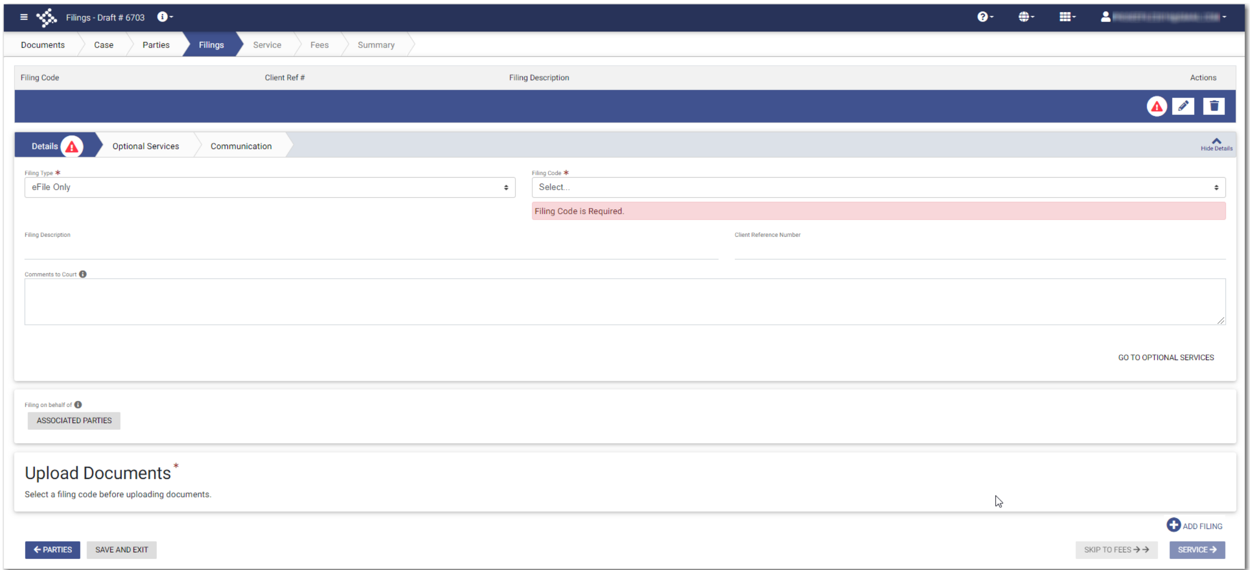
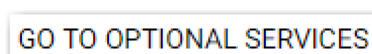



**Figure 7.29 – Filings Page**

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

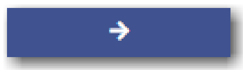
To enter the filing details:

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 

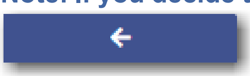
.

   The **Optional Services** tab is displayed.


**Figure 7.30 – Sample Optional Services Tab**

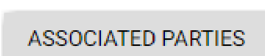
7. To select the applicable optional services, click  .

   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**  **.**

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.

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

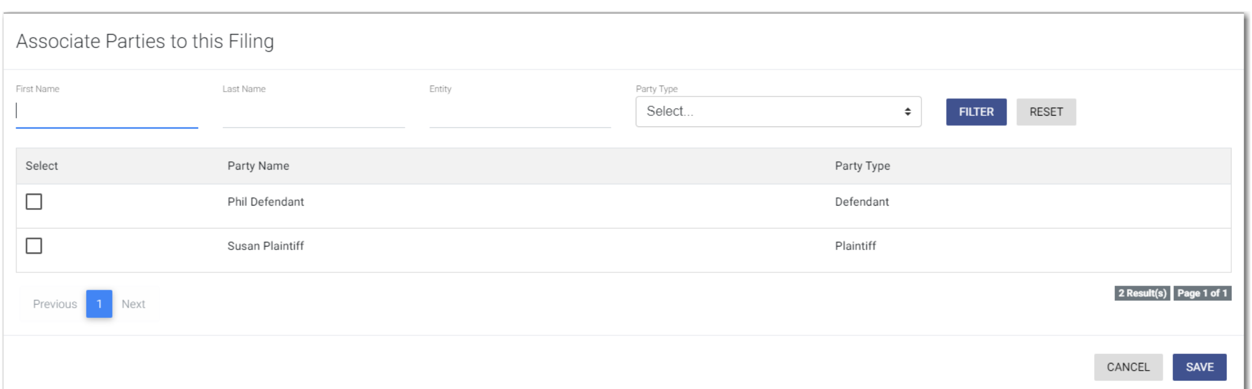



**Figure 7.31 – Associate Parties to this Filing Window**

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.

13. Click SAVE.

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.**

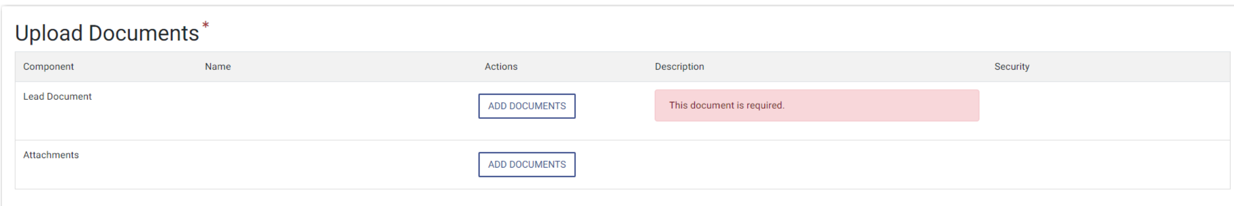



**Figure 7.32 – Upload Documents Pane**

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

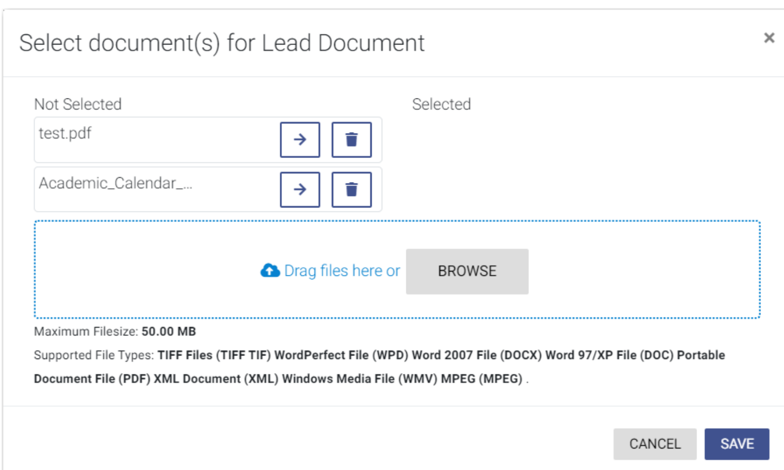
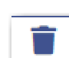



**Figure 7.33 – Select document(s) for Lead Document Window**

**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 SAVE.

17. If you have attachments to add to the filing, click ADD DOCUMENTS 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 SERVICE → 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.**

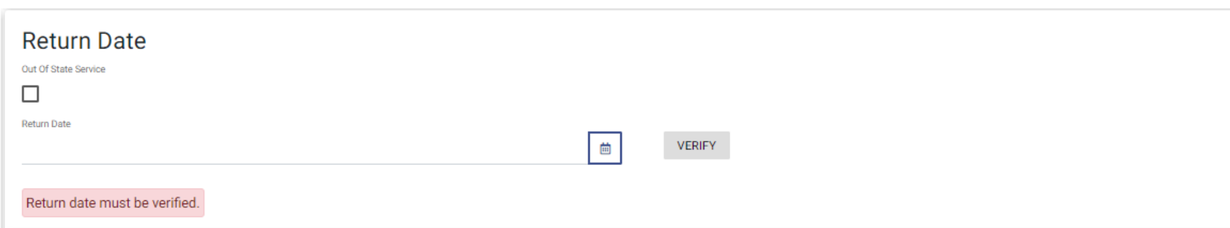



**Figure 7.34 – Return Date Pane**

After selecting a return date, you must click VERIFY 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.

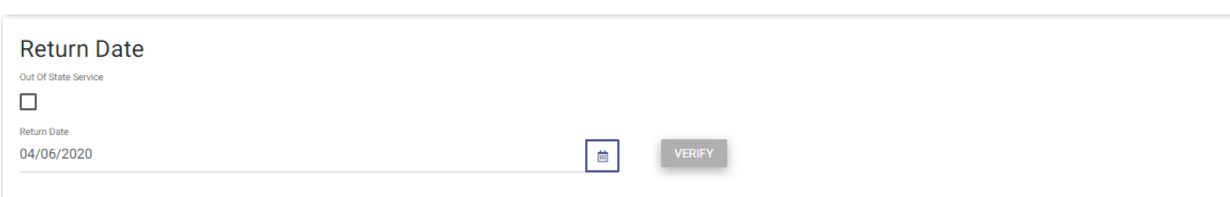



**Figure 7.36 – Sample Return Date Pane with Valid Date Displayed**

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

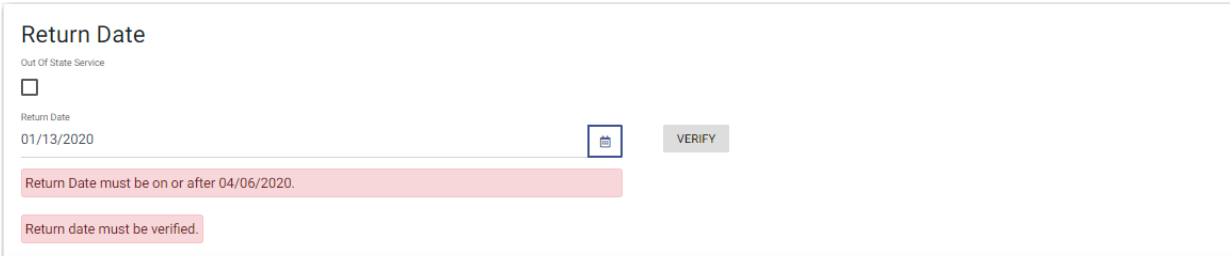
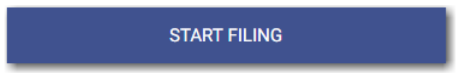



**Figure 7.37 – Return Date Pane with Error Message Displayed**

# 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:

1. From the *Dashboard* page, click 

.

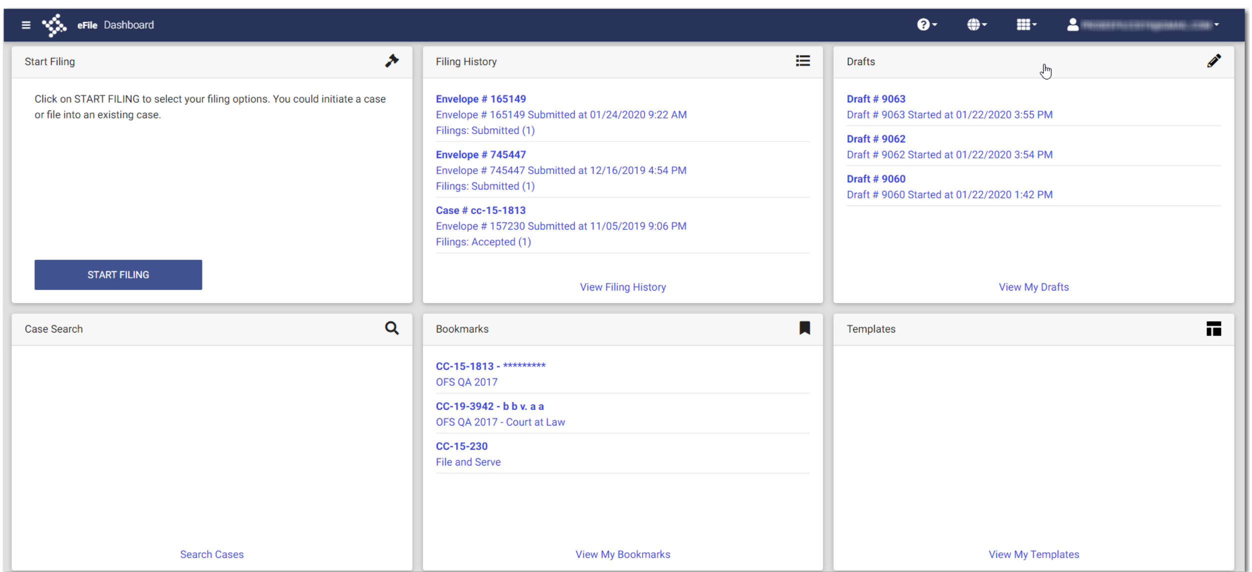



**Figure 7.38 – Dashboard Page**

The *Start Filing* page is displayed.

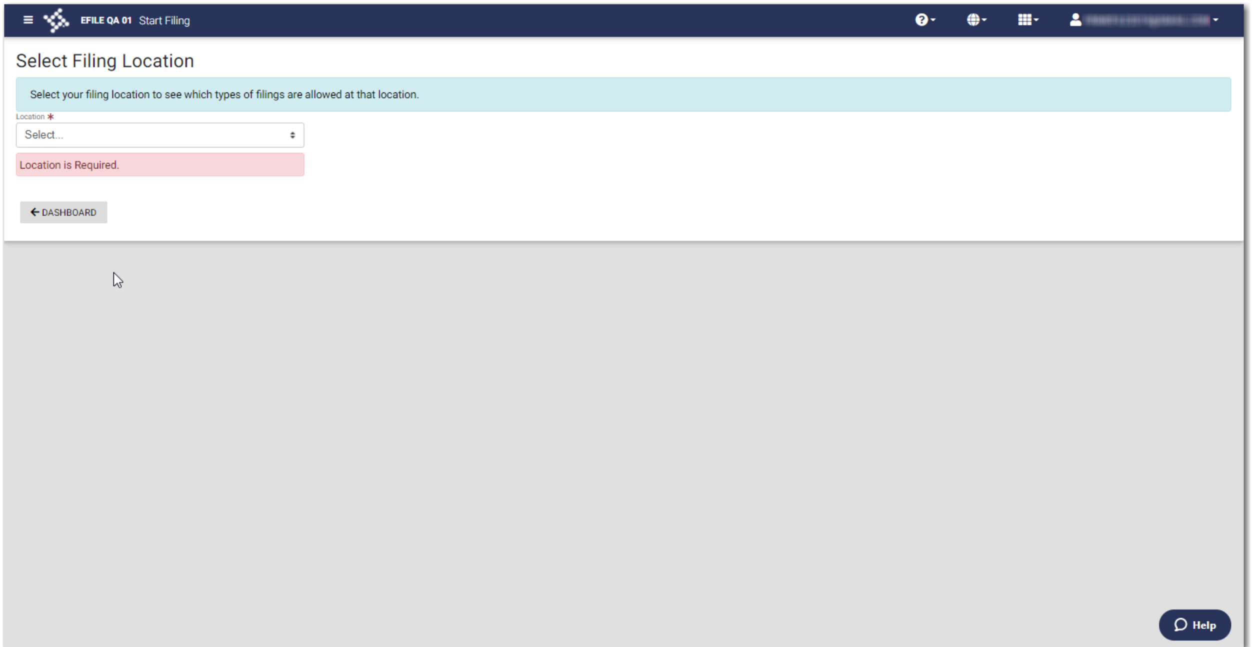



**Figure 7.39 – Start Filing Page**

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

   The New Case and the Existing Case panes are displayed.

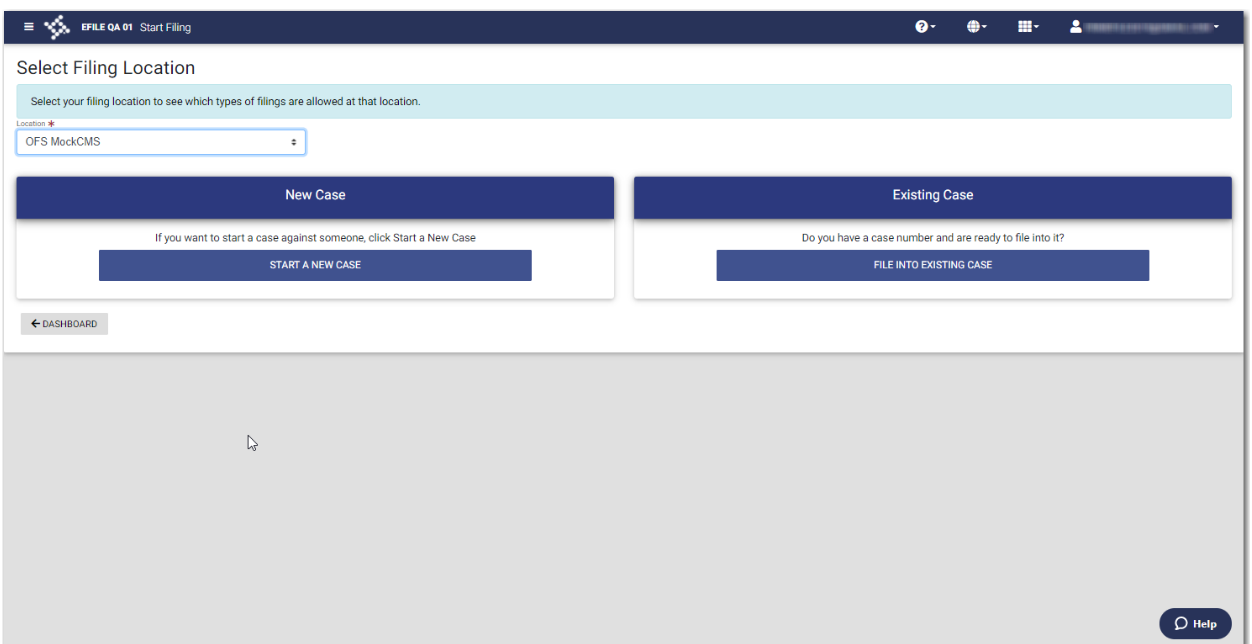



**Figure 7.40 – Start Filing Page with Case Panes Displayed**

3. Click 


   The *Upload Documents* page is displayed.

4. Click BROWSE to look for the documents that you want to upload.
5. Select each document to be uploaded.
6. Click 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.**
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.
8. Complete the fields on the *Parties* page, and then click FILINGS → .

   The *Filings* page is displayed.
9. Complete the fields on the *Filings* page, and then click SERVICE → .

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

    The *Fees* page is displayed.
11. Complete the fields on the *Fees* page, and then click SUMMARY → .

    The *Summary* page is displayed.

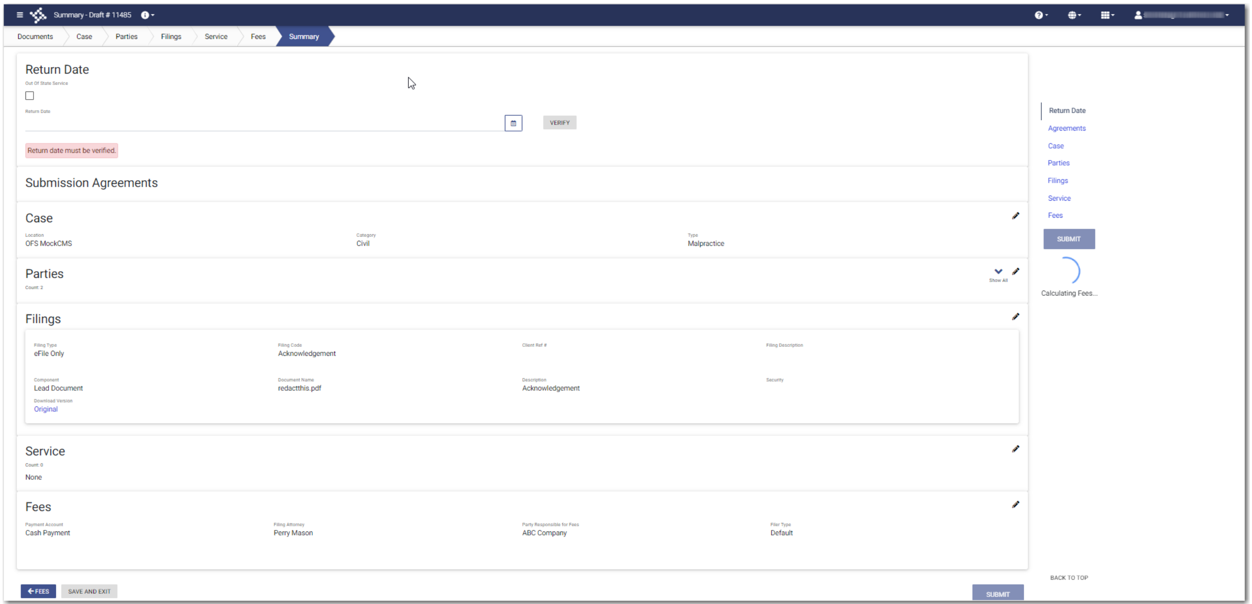



Figure 7.41 – Return Date Pane on the Summary Page

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.

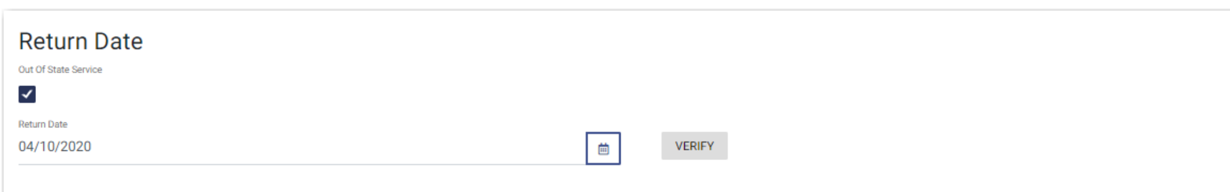



Figure 7.42 – Out of State Service Check Box Selected in the Return Date Pane

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.


Figure 7.43 – Return Date Verified Message

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

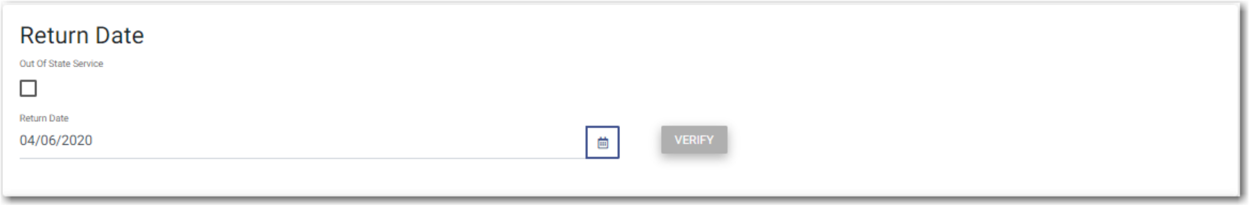



**Figure 7.44 – Sample Return Date Pane with Valid Date Displayed**

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.

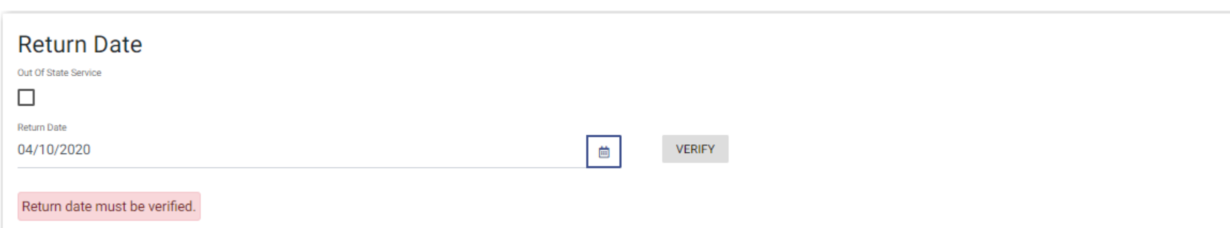



**Figure 7.45 – Return Date Pane**

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

# 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.

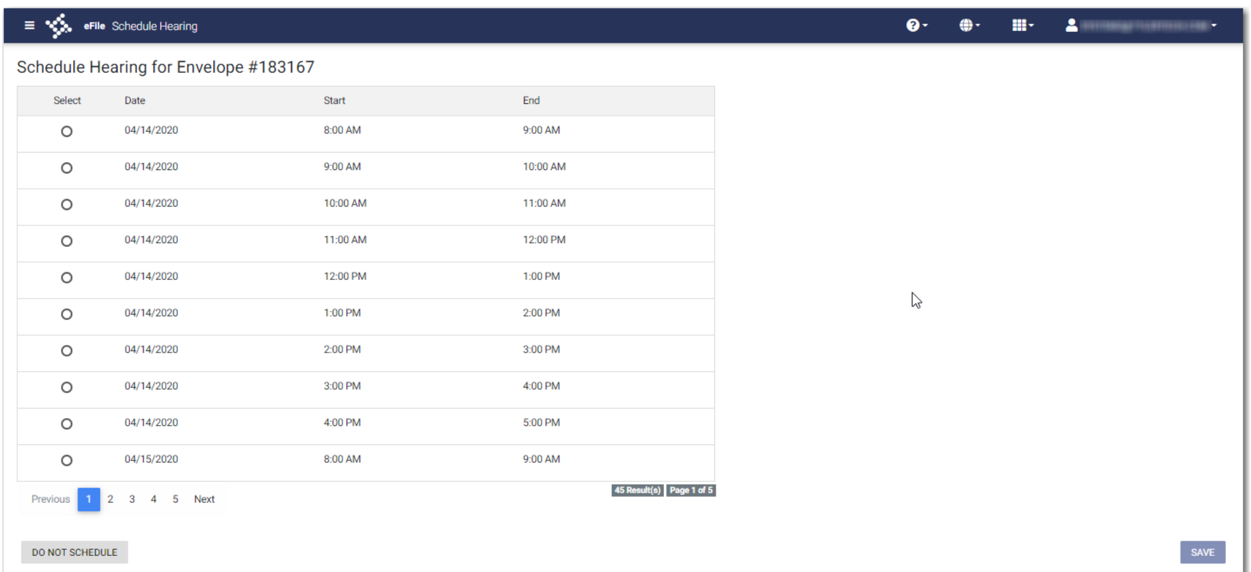



**Figure 7.46 – Sample Schedule Hearing Page**

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:

1. From the *Dashboard* page, click START FILING.

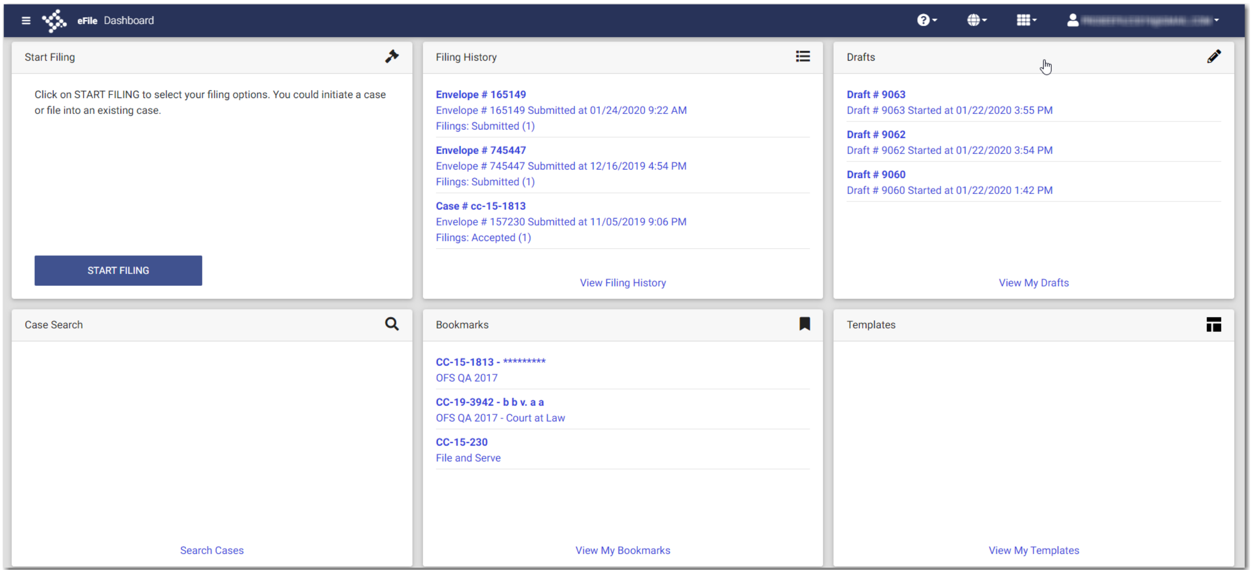



**Figure 7.47 – Dashboard Page**

The *Start Filing* page is displayed.

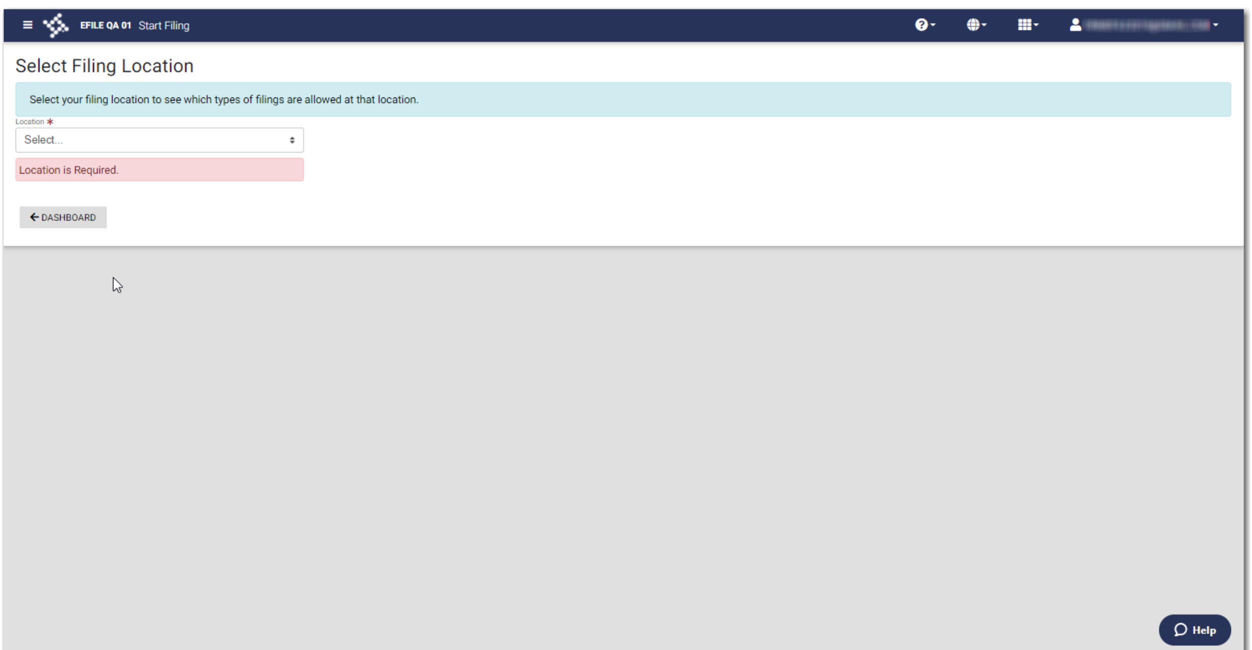



**Figure 7.48 – Start Filing Page**

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

   The New Case and the Existing Case panes are displayed.

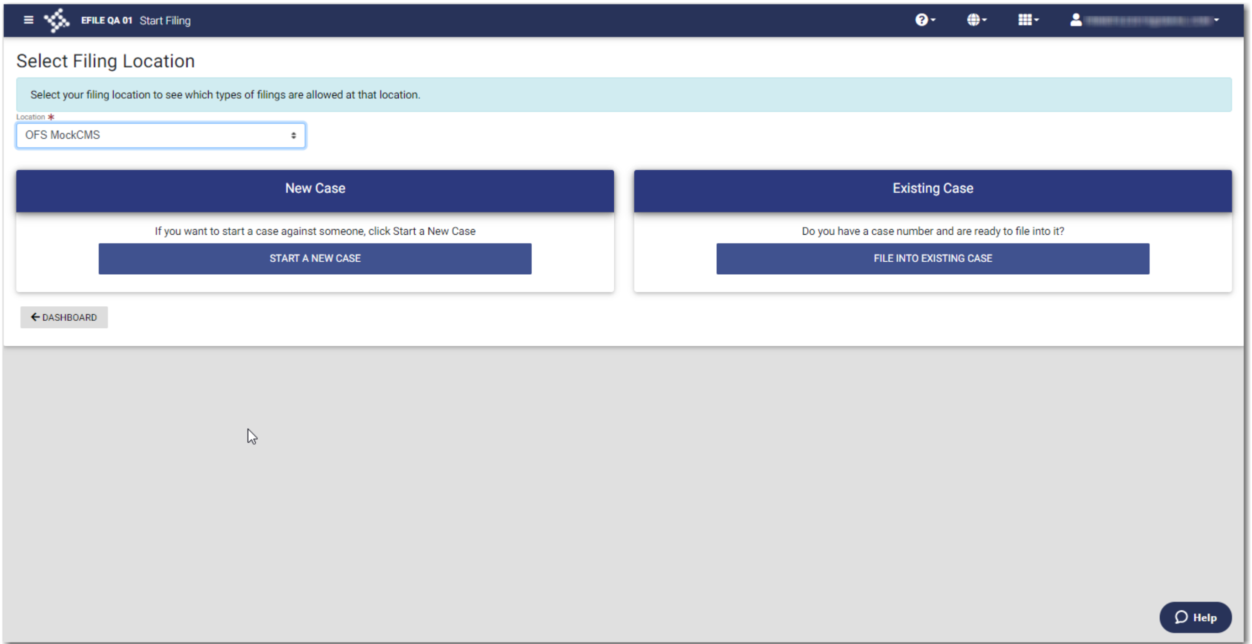



**Figure 7.49 – Start Filing Page with Case Panes Displayed**

3. Click START A NEW CASE

   The *Upload Documents* page is displayed.

4. Click BROWSE to look for the documents that you want to upload.
5. Select each document to be uploaded.
6. Click 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.**

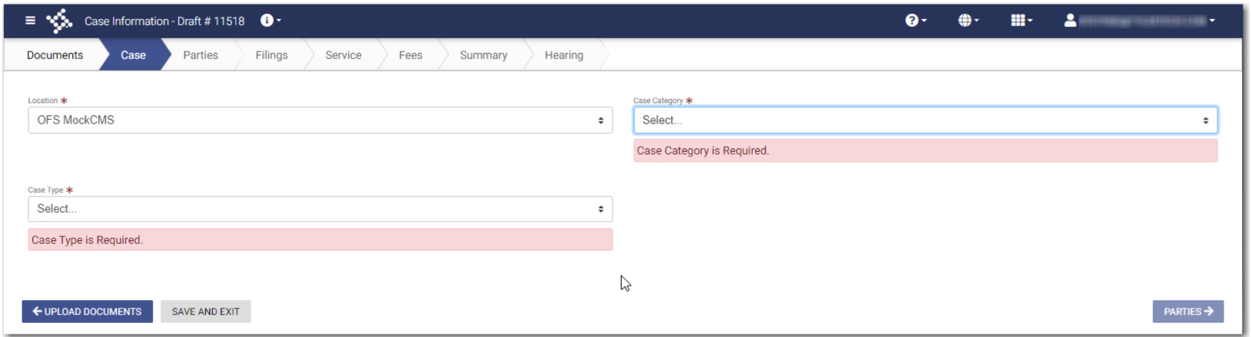



**Figure 7.50 – Case Information Page**

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.

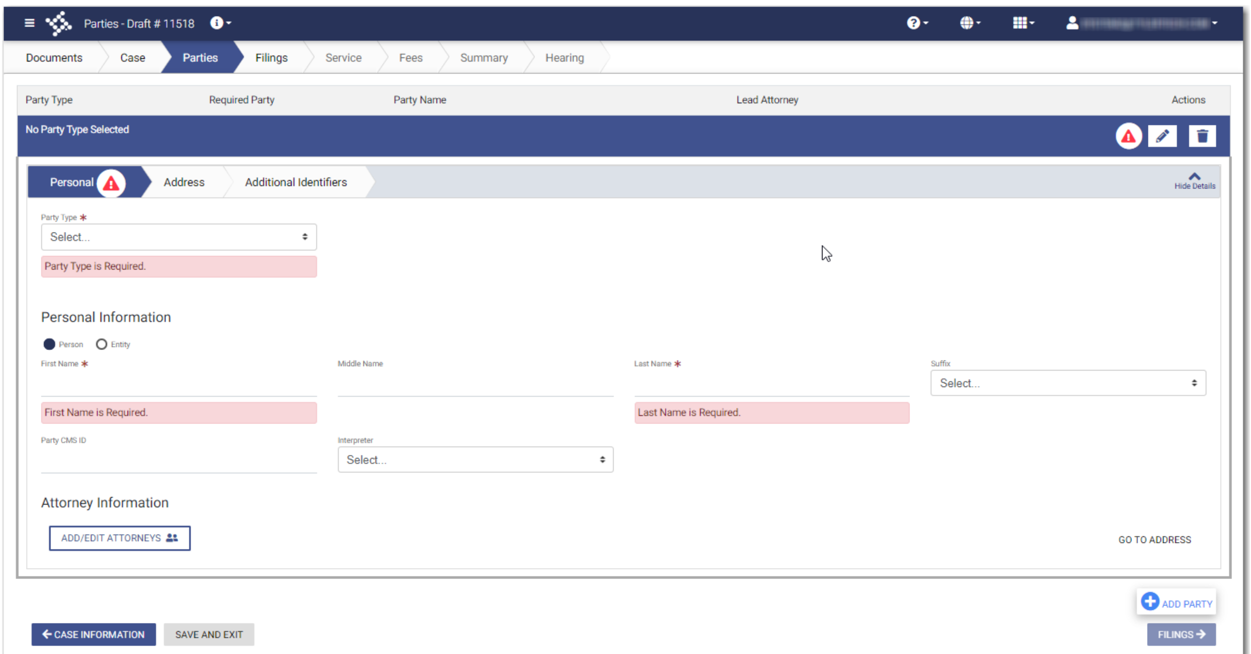



**Figure 7.51 – Parties Page**

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

   The *Filings* page is displayed.

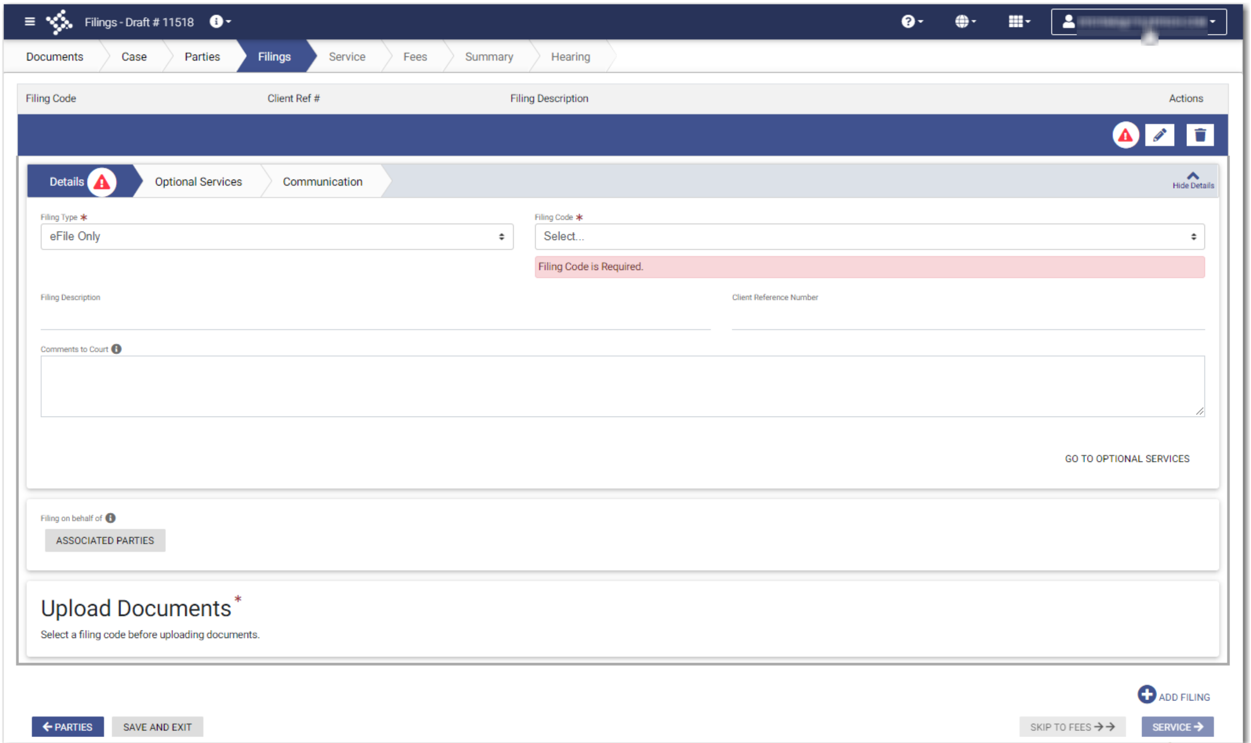



**Figure 7.52 – Filings Page**

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

   The *Service* page is displayed.

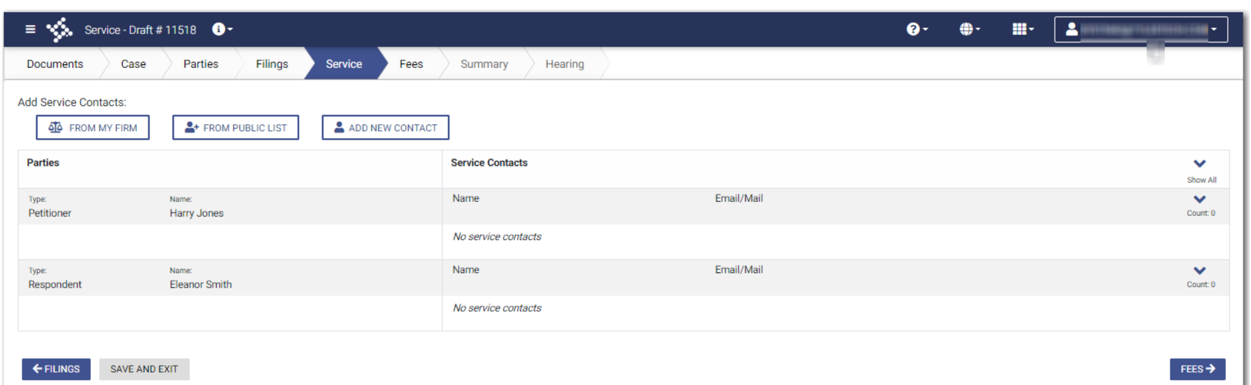



**Figure 7.53 – Service Page**

10. Select the service contacts, and then click **FEES**.

    The *Fees* page is displayed.

11. Complete the fields on the *Fees* page, and then click **SUMMARY →**.

The *Summary* page is displayed.

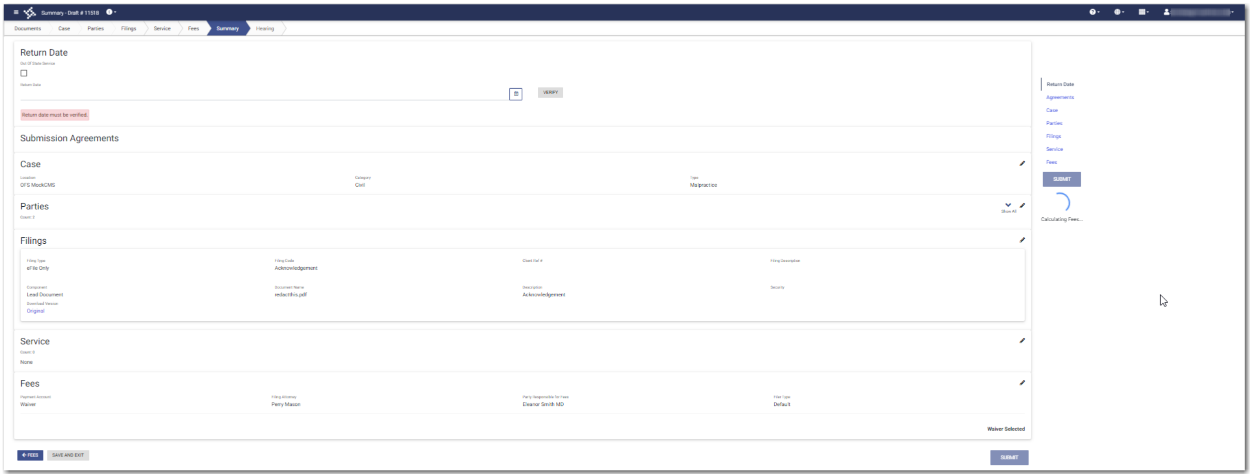



**Figure 7.54 – Summary Page**

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

    The *Schedule Hearing* page is displayed.

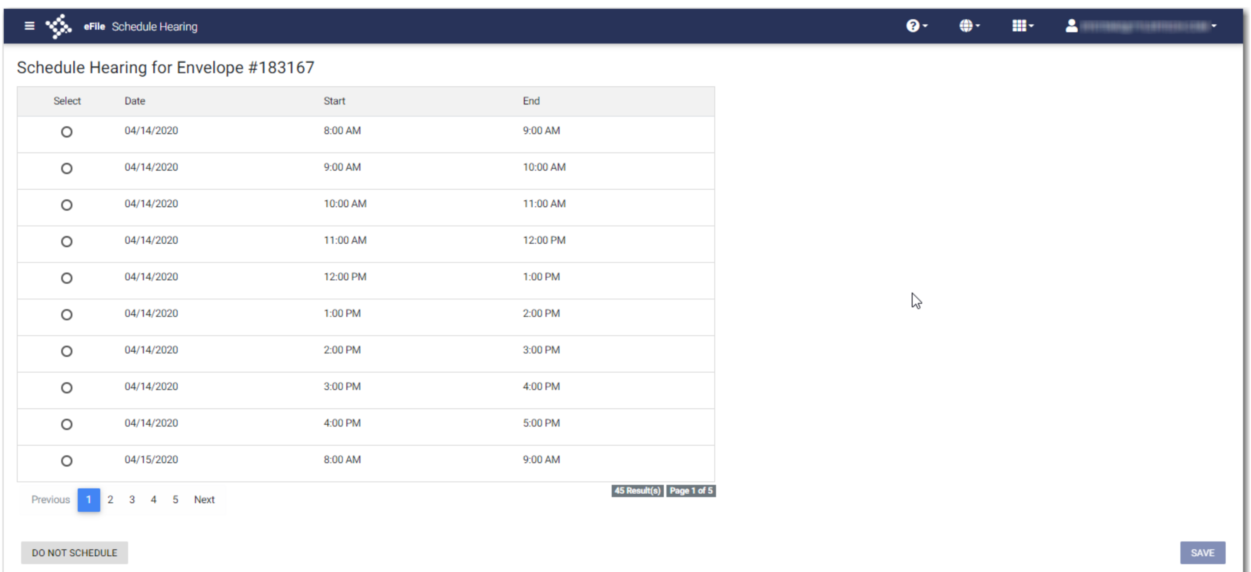
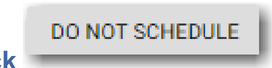



**Figure 7.55 – Sample Schedule Hearing Page**

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** 

**.**

# 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.

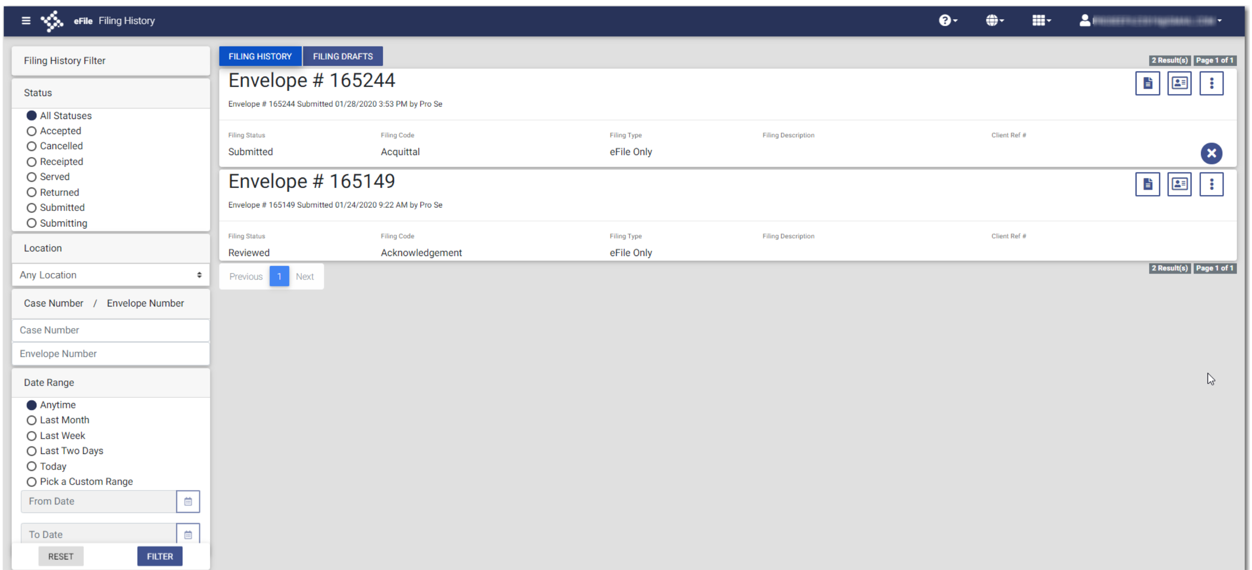



**Figure 7.56 – Filing History Page**

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

3. Click .

   The envelope details are displayed.

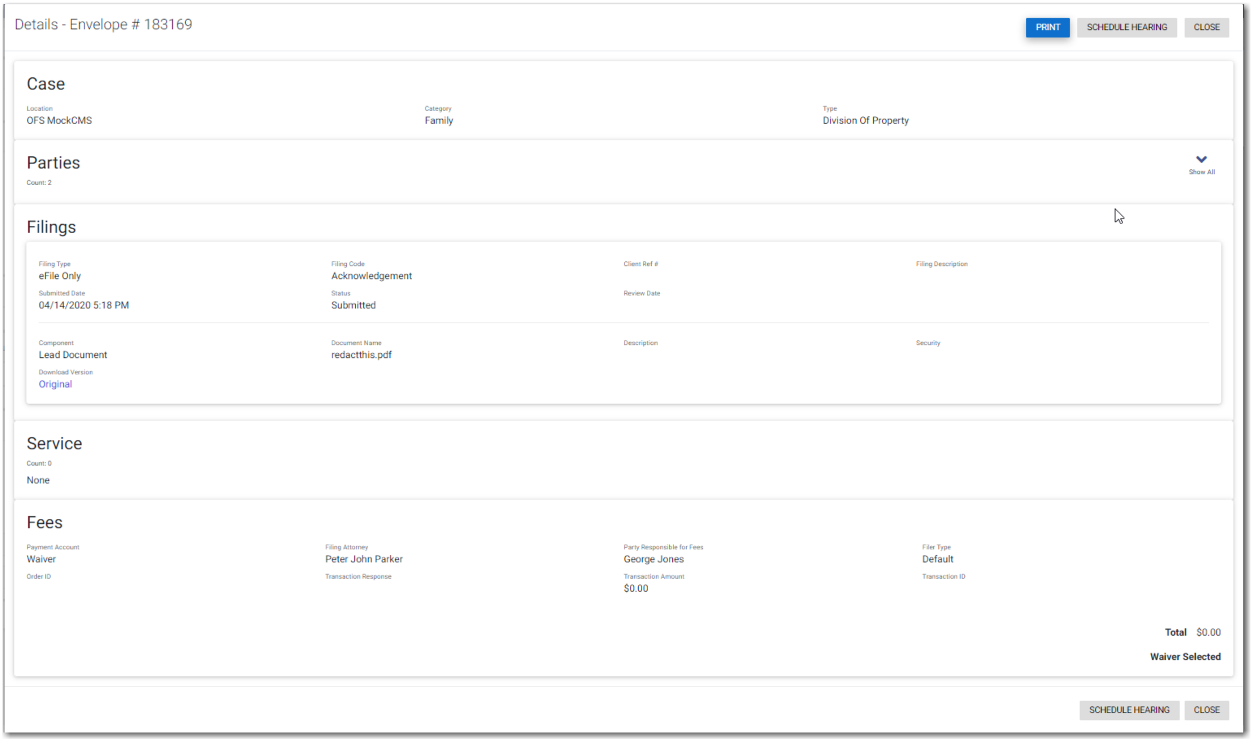



**Figure 7.57 – Sample Envelope Details Page**

4. Click SCHEDULE HEARING.

   The *Schedule Hearing* page is displayed.

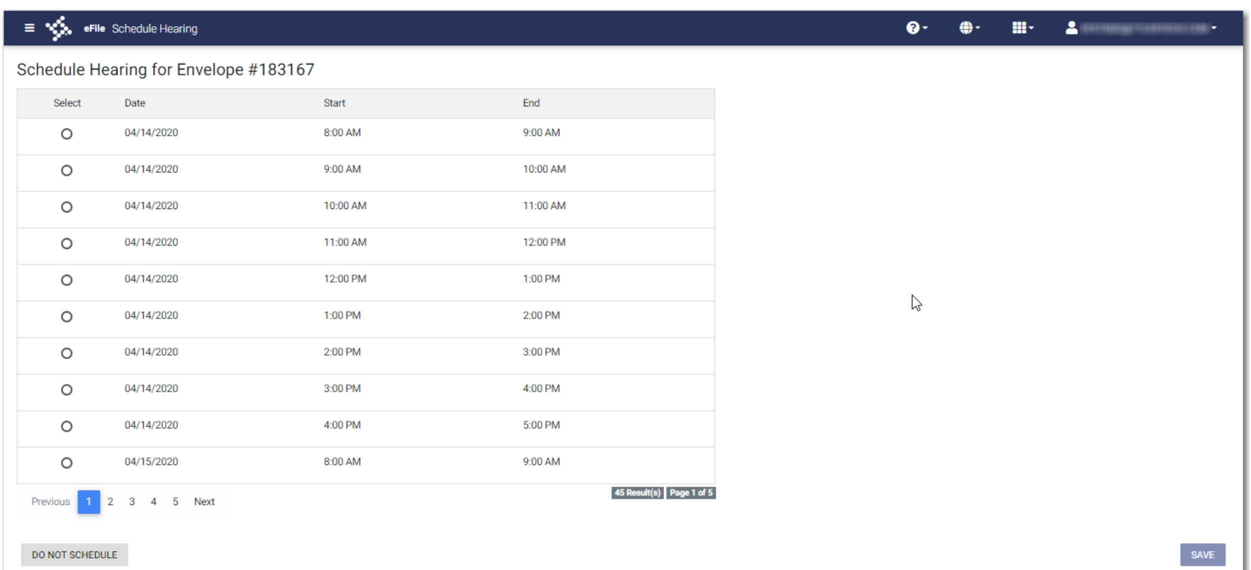



**Figure 7.58 – Sample Schedule Hearing Page**

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

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

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

# Entering a Filing with an Ad Damnum Amount

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

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

To enter filing details:

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

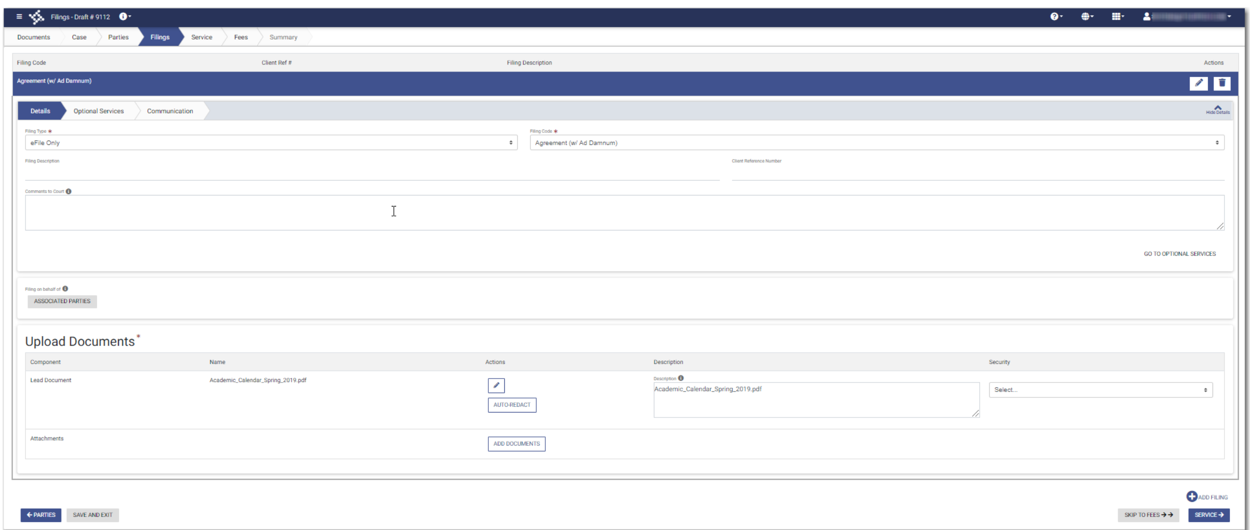
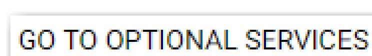



**Figure 7.59 – Filings Page**

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

.

   The **Optional Services** tab is displayed.

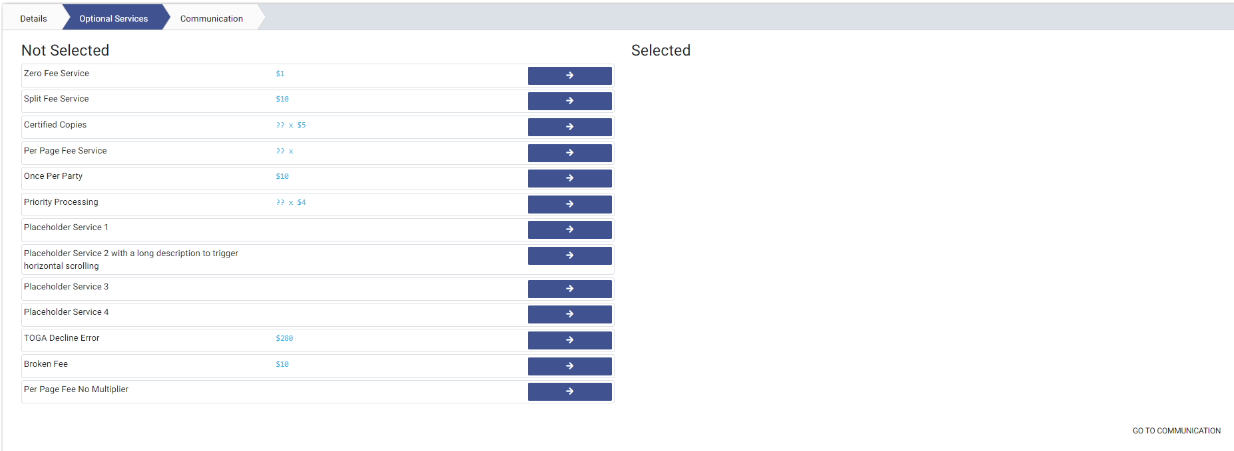
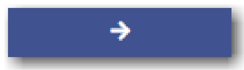
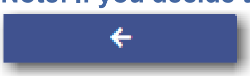
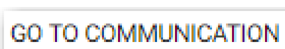



**Figure 7.60 – Sample Optional Services Tab**

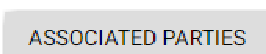
7. To select the applicable optional services, click  .

   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**  **.**

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.

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

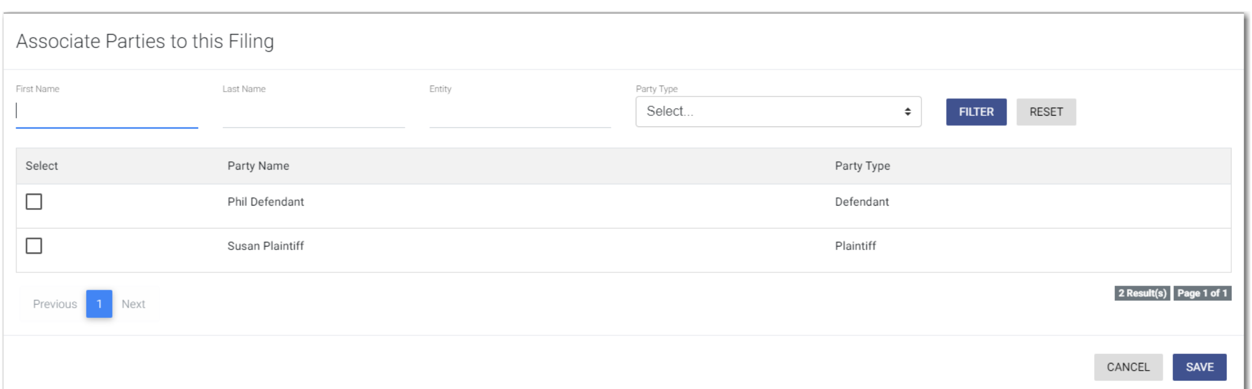



**Figure 7.61 – Associate Parties to this Filing Window**

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.

13. Click SAVE.

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.**

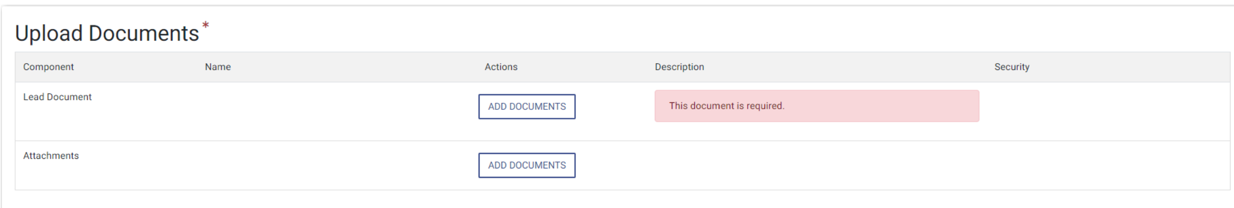



**Figure 7.62 – Upload Documents Pane**

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

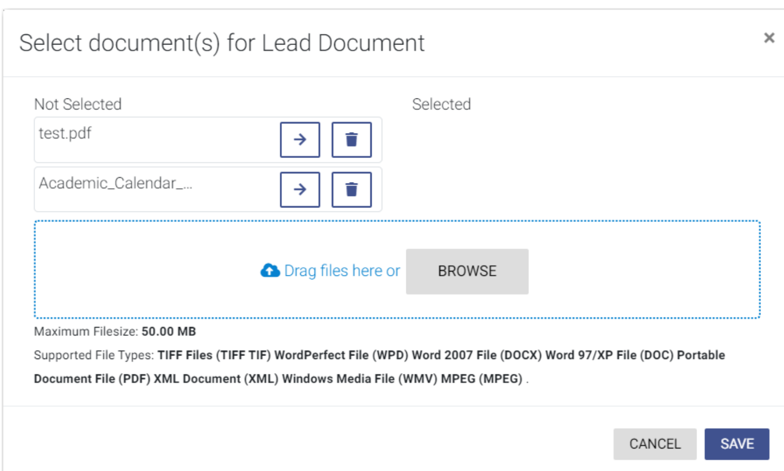



**Figure 7.63 – Select document(s) for Lead Document Window**

**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 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 SAVE.
17. If you have attachments to add to the filing, click ADD DOCUMENTS 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 NEXT FILING. Then, repeat the same steps for the next filing.
20. After you have added all of the filings, click SERVICE ➔.

    The *Service* page is displayed.

21. Select the service contacts, and then click FEES.

    The *Fees* page is displayed.

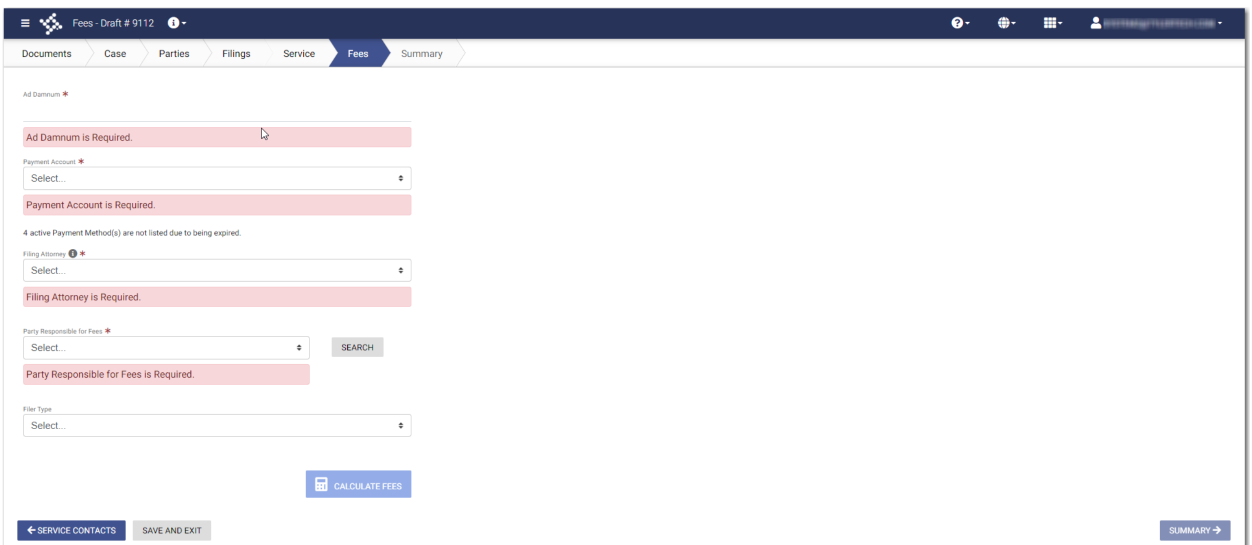



**Figure 7.64 – Fees Page**

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 CALCULATE FEES.

The fees for the filing are displayed.

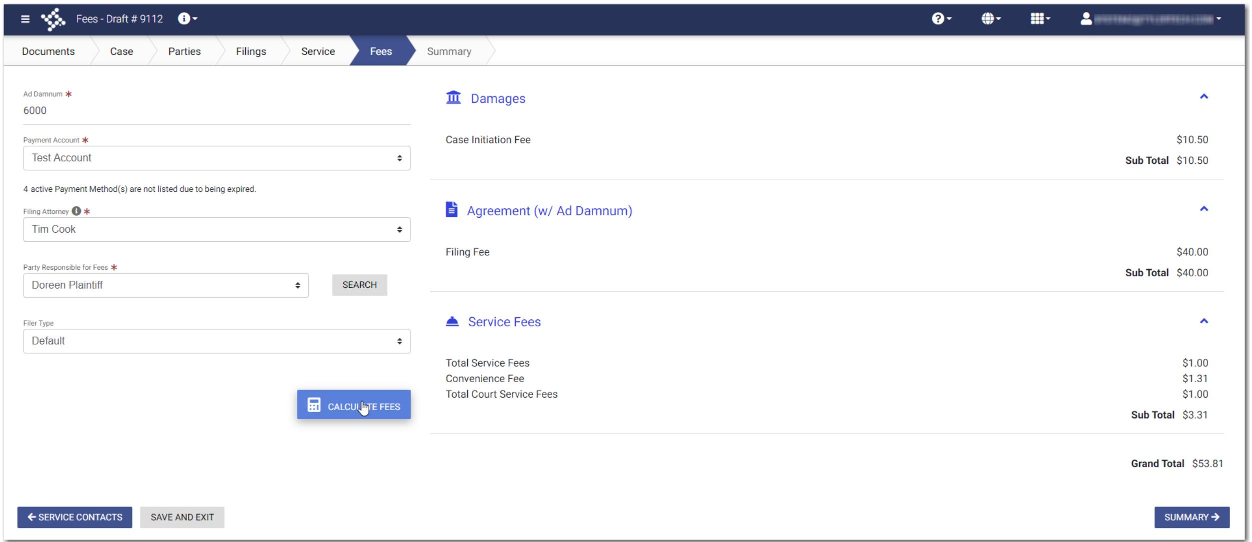



**Figure 7.65 – Sample Ad Damnum Fees on the Fees Page**

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.**

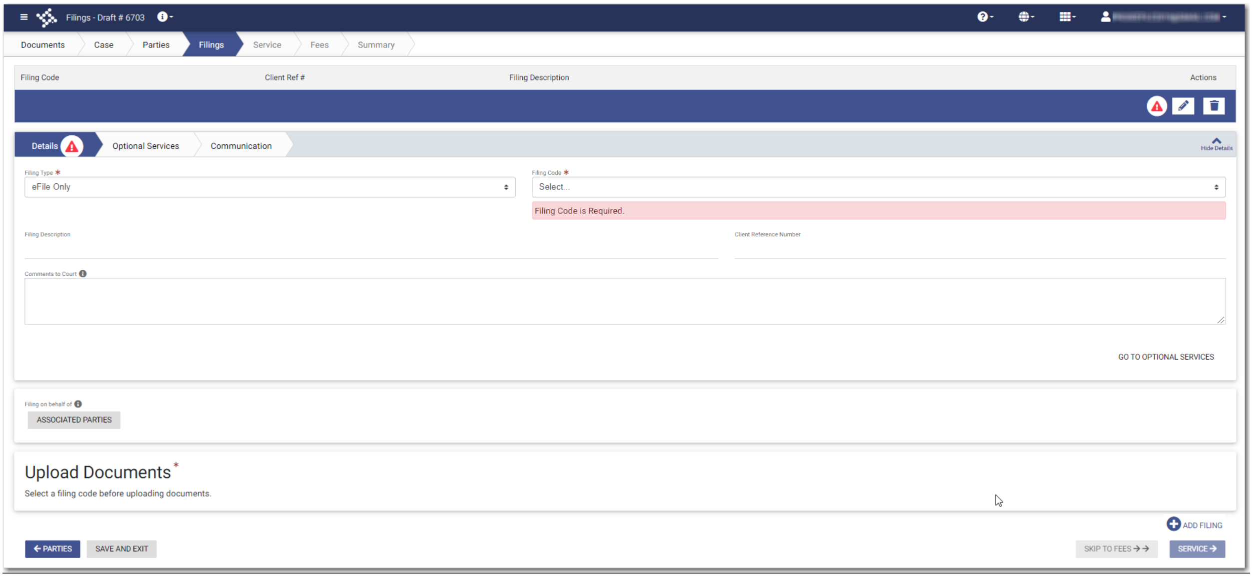



**Figure 7.66 – Filings Page**

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.

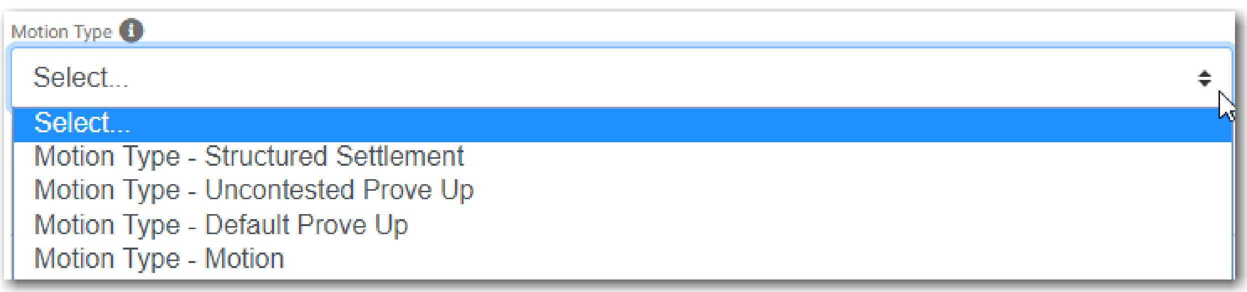



**Figure 7.67 – Sample Motion Type Drop-Down List**

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.

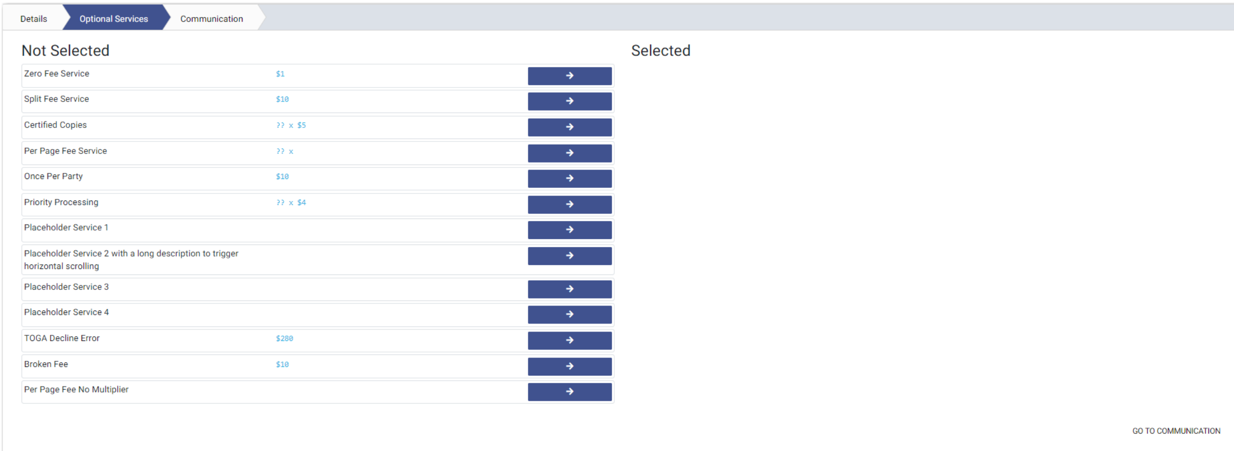
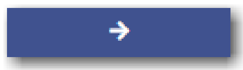
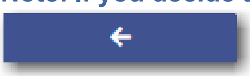



**Figure 7.68 – Sample Optional Services Tab**

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**  **.**

9. Click **GO TO COMMUNICATION** 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.

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

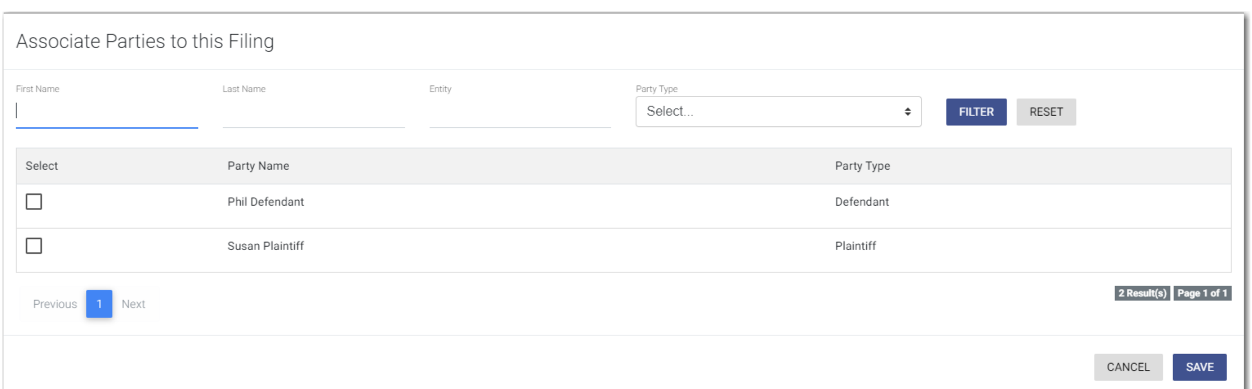



**Figure 7.69 – Associate Parties to this Filing Window**

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.

14. Click .

15. 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."**

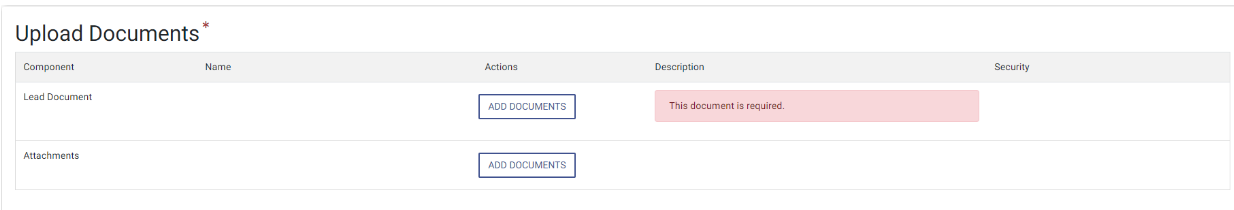



**Figure 7.70 – Upload Documents Pane**

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

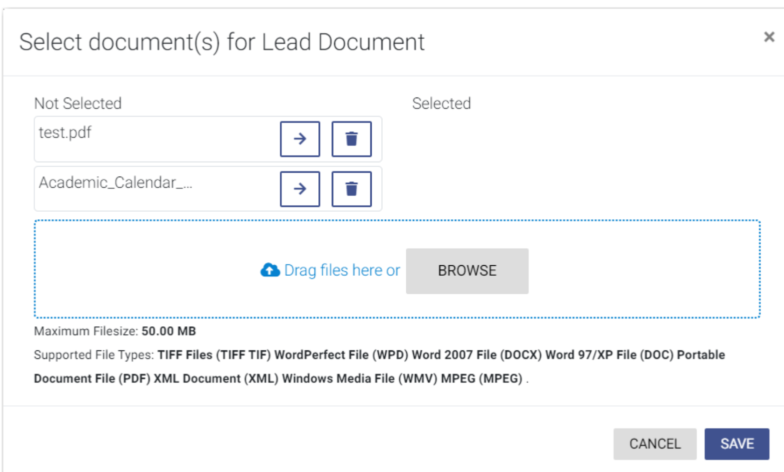
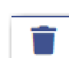



**Figure 7.71 – Select document(s) for Lead Document Window**

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

16. 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 .**

17. After you have added all of your lead documents, click .

18. If you have attachments to add to the filing, click **ADD DOCUMENTS** in the **Attachments** section.

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

20. If you want to add another filing, click NEXT FILING. Then, repeat the same steps for the next filing.

21. After you have added all of the filings, click either SERVICE → or SKIP TO FEES.

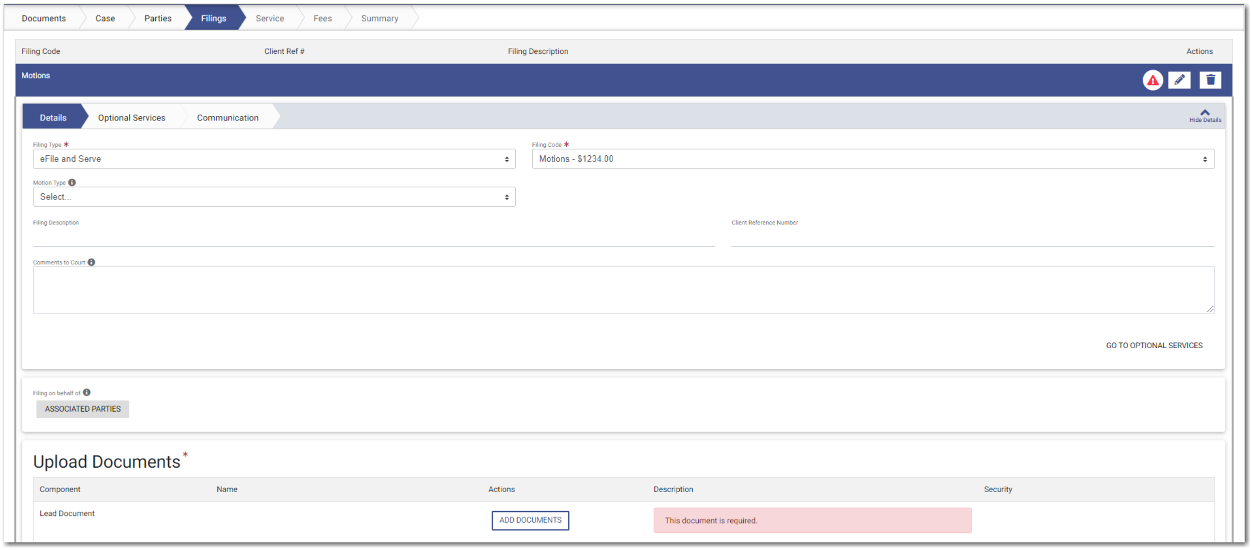



**Figure 7.72 – Example of a Filings Page with a Motion Filing Code Selected**

# 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.

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

To enter filing details:

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

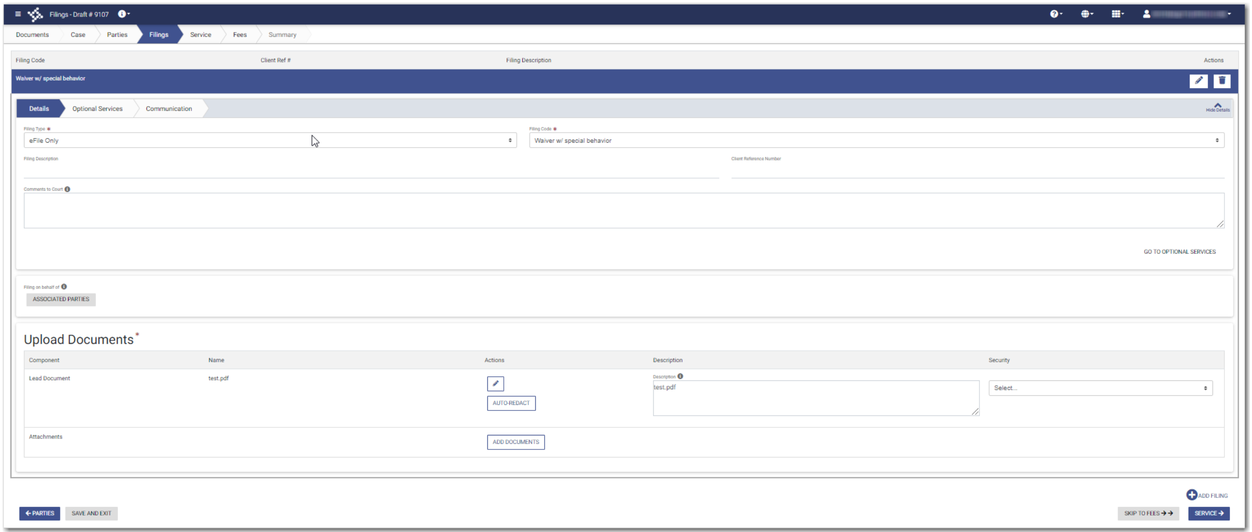


Figure 7.73 – Example of a Filings Page

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.
6. If you need to apply any optional services for the filing, click GO TO OPTIONAL SERVICES.

   The **Optional Services** tab is displayed.


Figure 7.74 – 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 ← .**

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

9. Click ASSOCIATED PARTIES to associate parties with the filing.

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

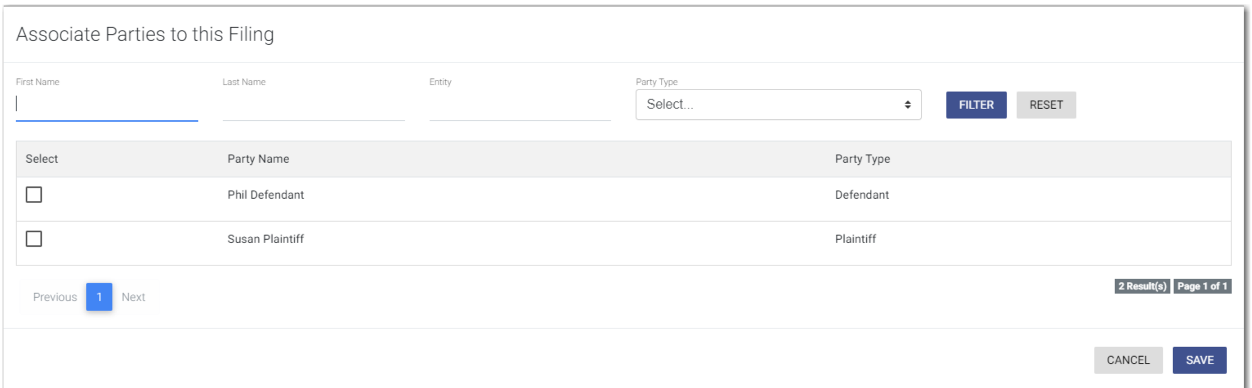



**Figure 7.75 – Associate Parties to this Filing Window**

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.
13. Click SAVE .
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.**

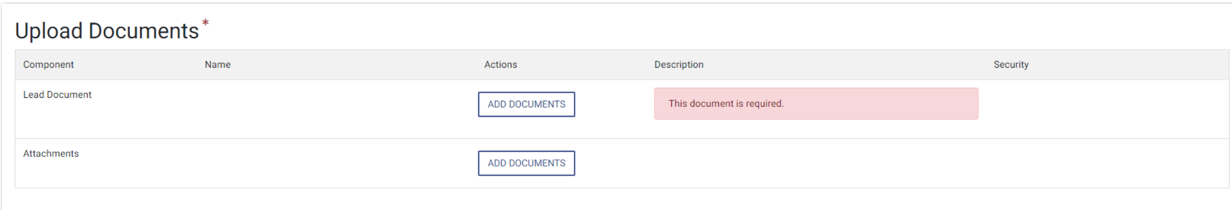



**Figure 7.76 – Upload Documents Pane**

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

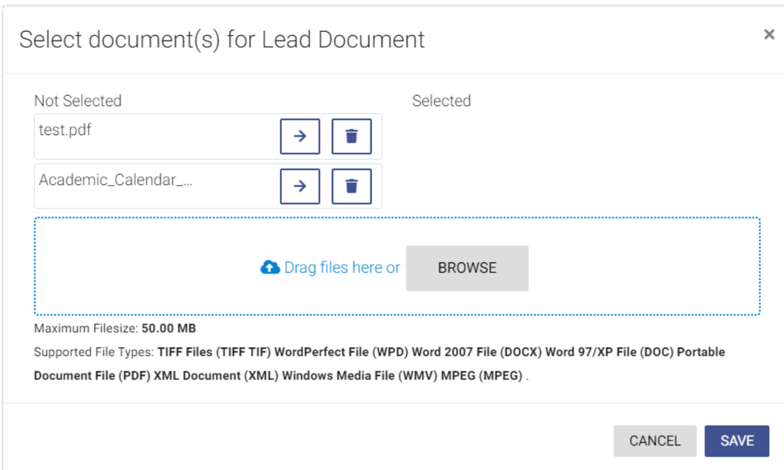



**Figure 7.77 – Select document(s) for Lead Document Window**

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

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 SAVE.
17. If you have attachments to add to the filing, click ADD DOCUMENTS 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 NEXT FILING. Then, repeat the same steps for the next filing.
20. After you have added all of the filings, click SERVICE →.

    The *Service* page is displayed.

21. Select the service contacts, and then click FEES.

The *Fees* page is displayed.

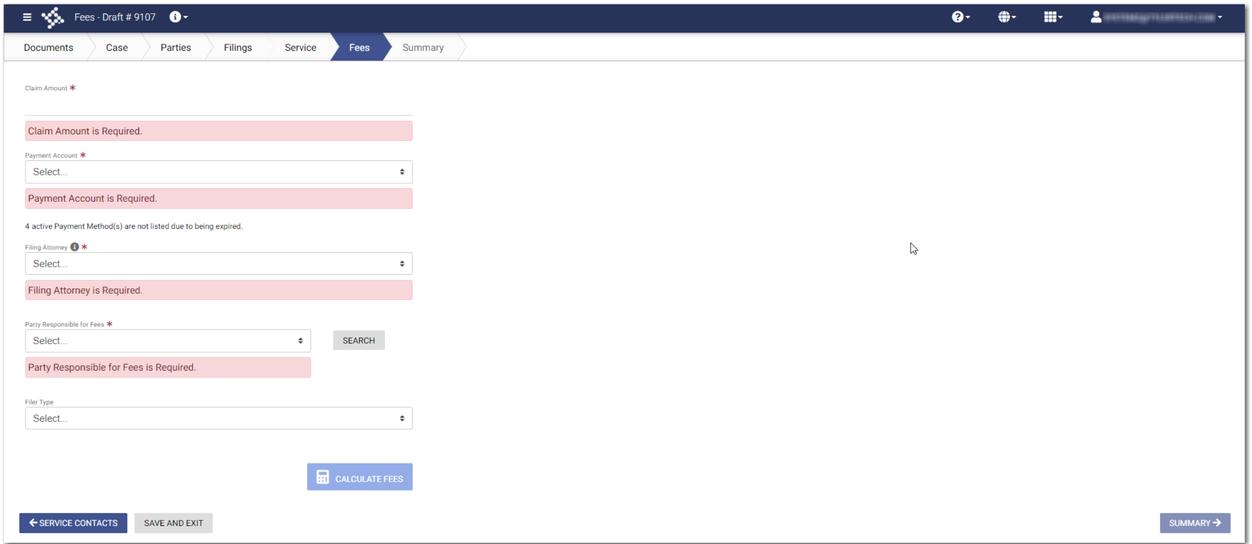



Figure 7.78 – Fees Page

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.
27. Click 

.

    The fees for the filing are displayed.

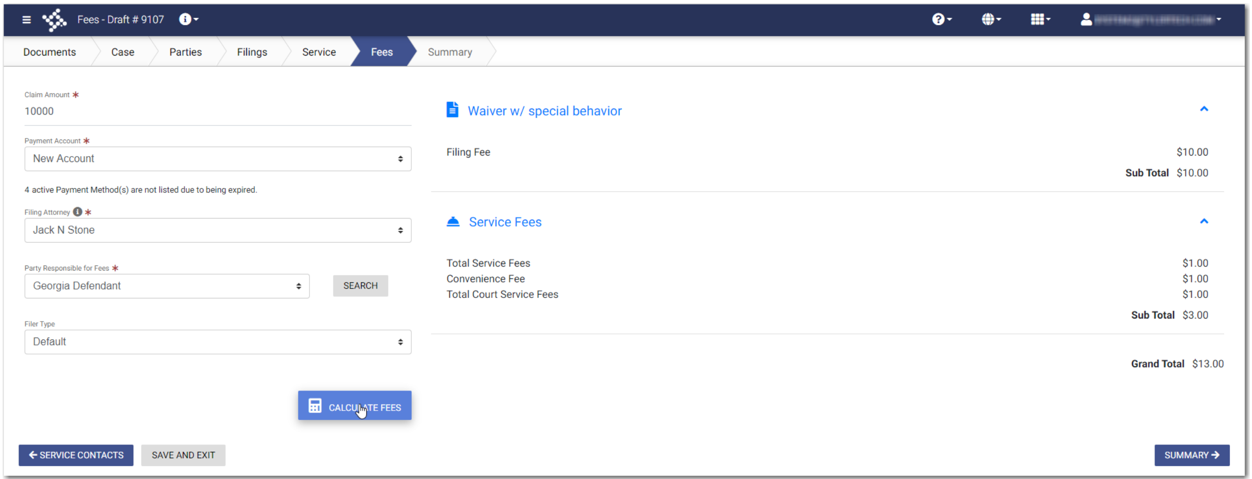



**Figure 7.79 – Sample Claim Amount Fees on the Fees Page**

28. Click **SUMMARY** 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.

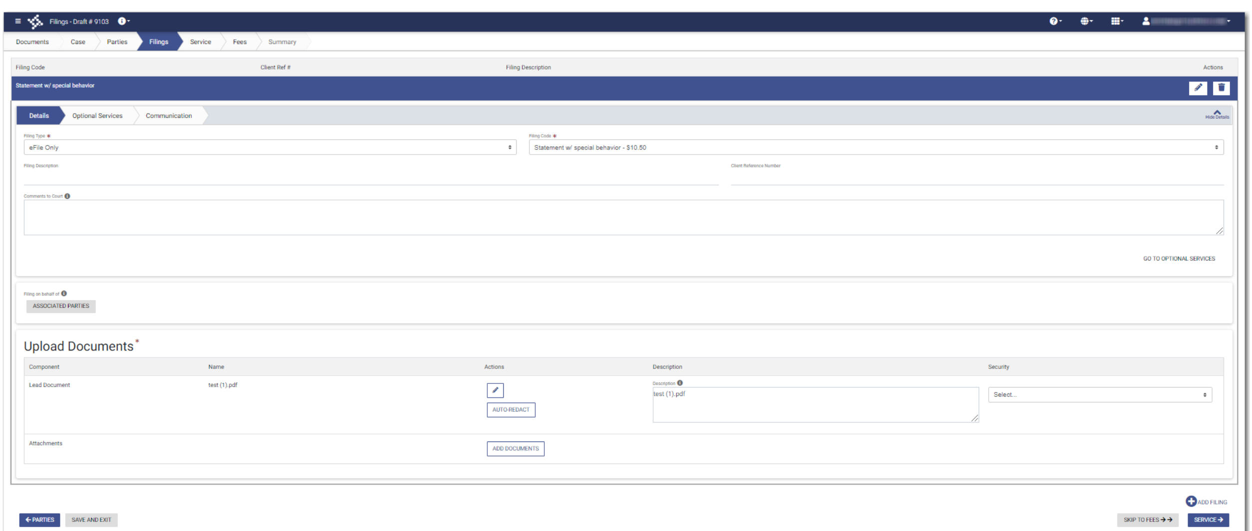


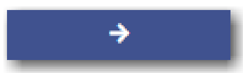

**Figure 7.80 – Example of a Filings Page**

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

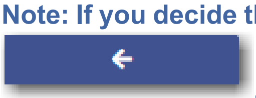
3. Type a description of the filing in the **Filing Description** field.
4. Type a client reference number in the **Client Reference Number** field.
5. Type any relevant comments in the **Comments to Court** field.
6. if you need to apply any optional services for the filing, click GO TO OPTIONAL SERVICES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

   The **Optional Services** tab is displayed.


**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**  **.**

8. Click GO TO COMMUNICATION to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.
9. Click ASSOCIATED PARTIES to associate parties with the filing.

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

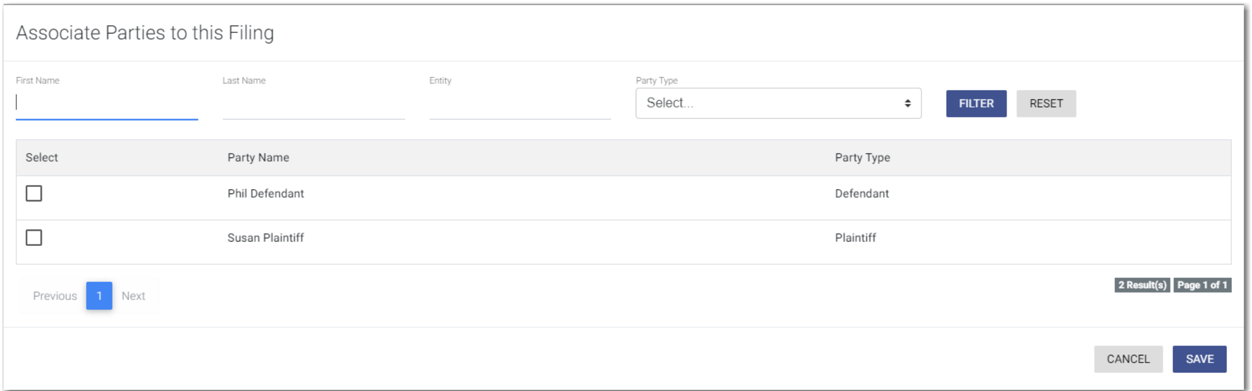



**Figure 7.82 – Associate Parties to this Filing Window**

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.
13. Click SAVE.
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.**

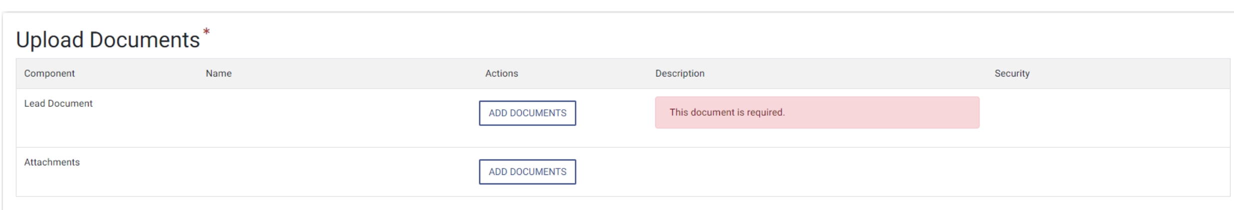



**Figure 7.83 – Upload Documents Pane**

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

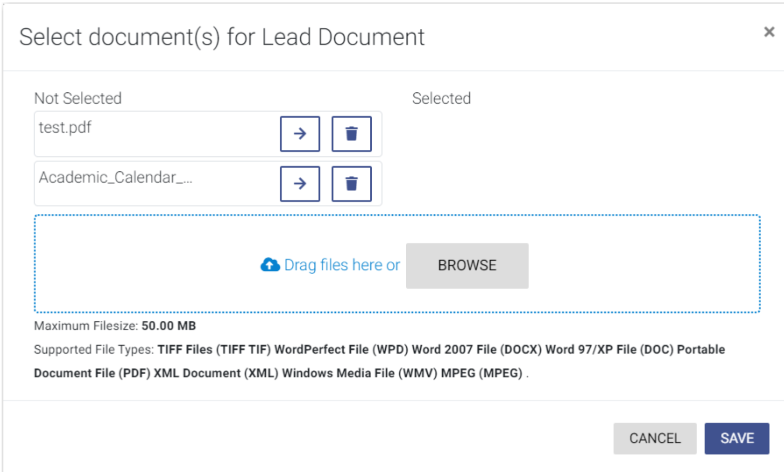



**Figure 7.84 – Select document(s) for Lead Document Window**

**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 SAVE.
17. If you have attachments to add to the filing, click ADD DOCUMENTS 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 NEXT FILING. Then, repeat the same steps for the next filing.
20. After you have added all of the filings, click SERVICE →.

    The *Service* page is displayed.

21. Select the service contacts, and then click FEES.

    The *Fees* page is displayed.

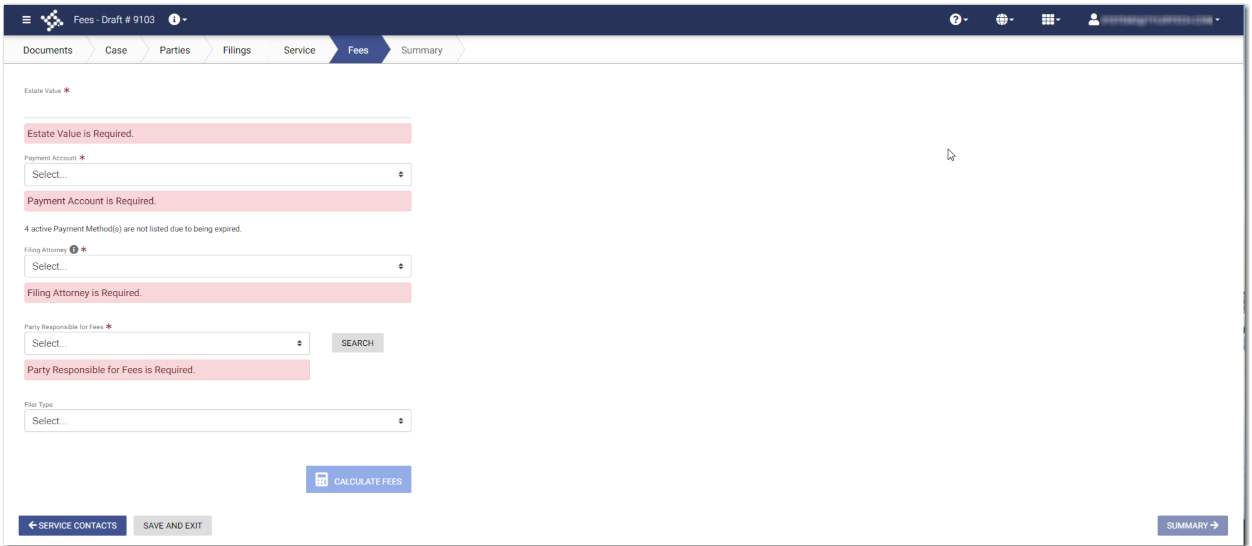



Figure 7.85 – Fees Page

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.
27. Click 

.

    The fees for the filing are displayed.

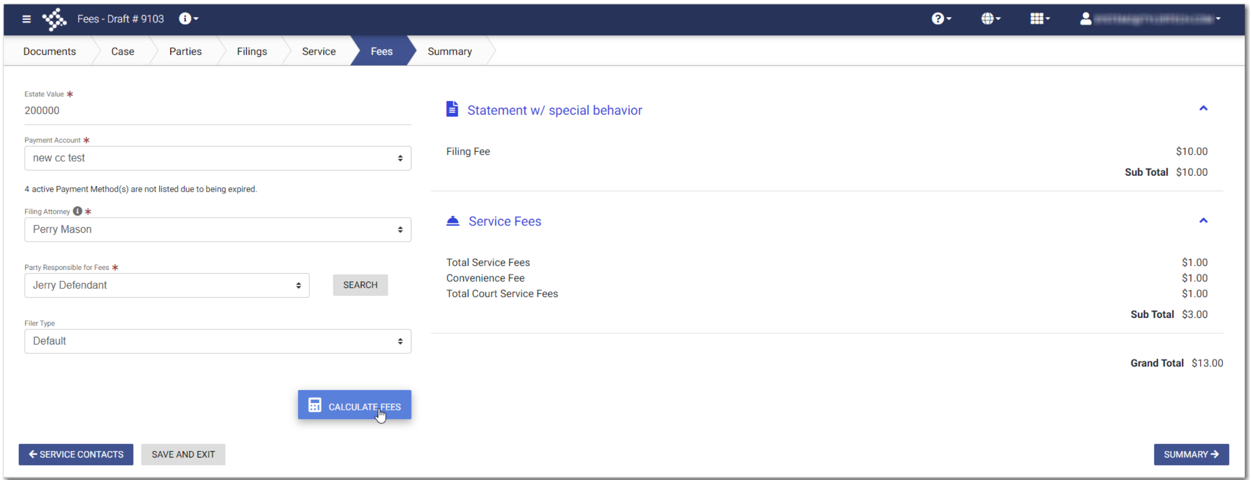



Figure 7.86 – Sample Estate Value Fees on the Fees Page

28. Click 

to review and complete your filing.

# Entering Payment Information

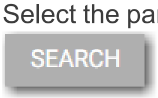
Enter the payment information for your filing on the *Fees* page.

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


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 

if you want to search for a party.

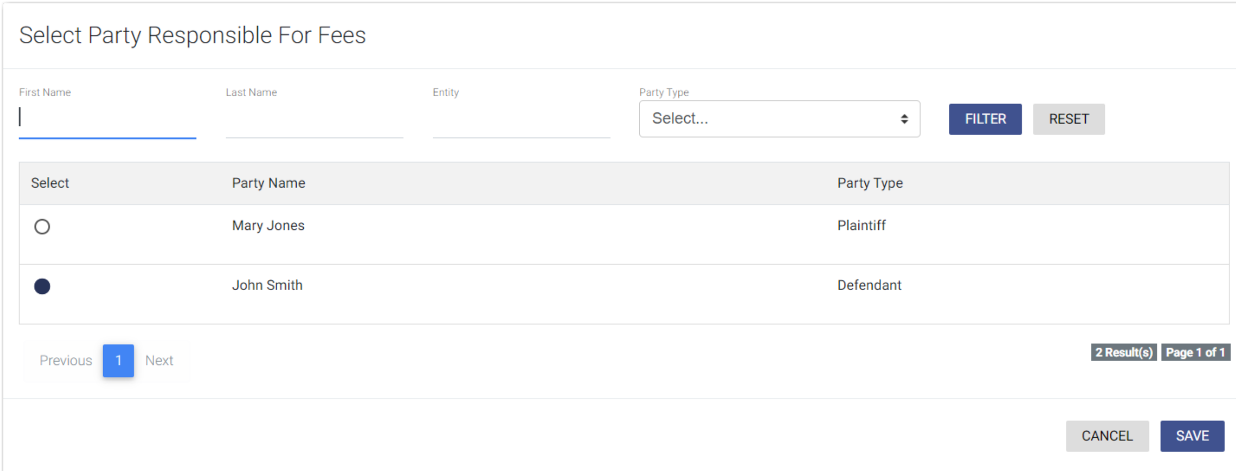



**Figure 7.88 – Select Party Responsible For Fees Window**

**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.
4. Click 

.

The fees for the filing are displayed.

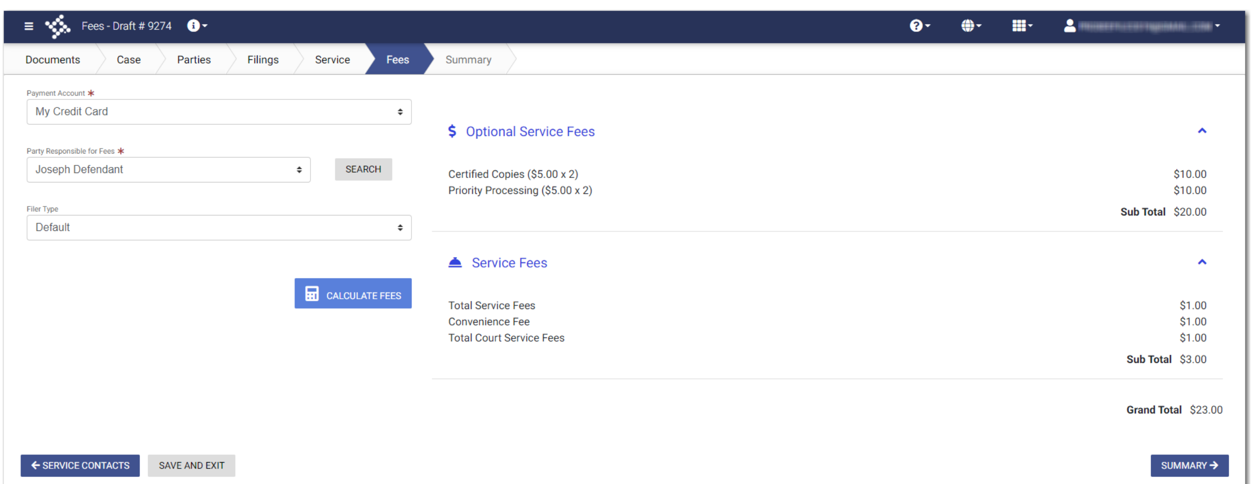



**Figure 7.89 – Example of a Fees Page with the Filing Fees Displayed**

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.**

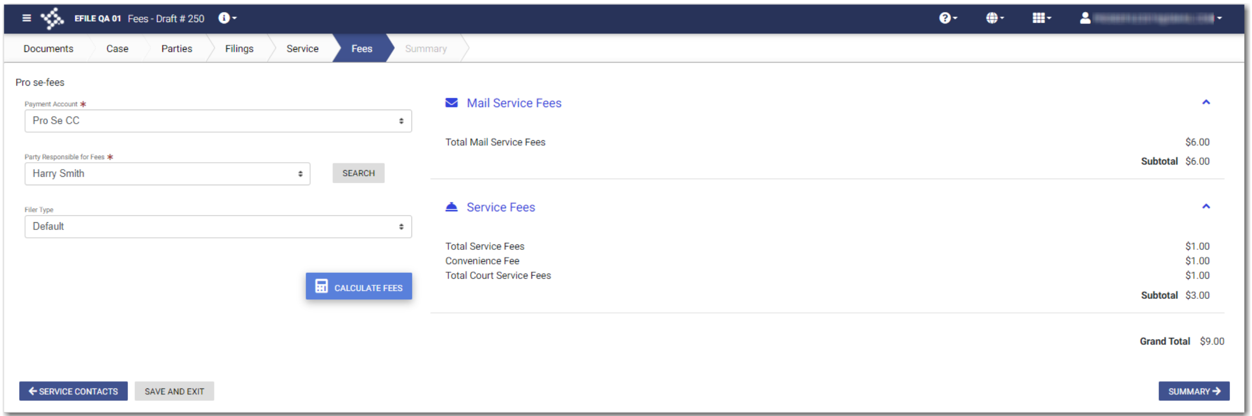



**Figure 7.90 – Example of a Fees Page with the Mail Service Fees Displayed**

5. Review the filing fees, and then click 

.

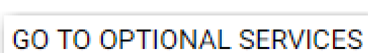
# Entering Payment Information for Per-Page Optional Service Fee

You can select optional services for your case filing. One of the options calculates the service fee on a per-page 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.
   c. Click 

.

      The **Optional Services** tab is displayed.

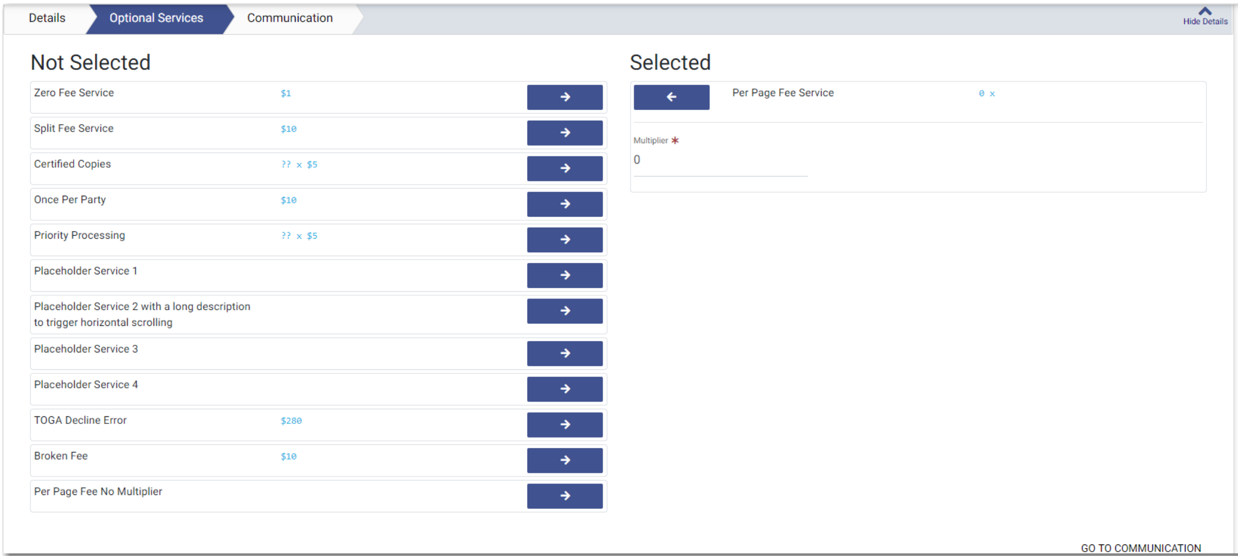
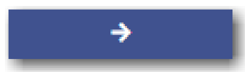
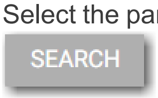



**Figure 7.91 – Sample Optional Services Tab**

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 

 if you want to search for a party.

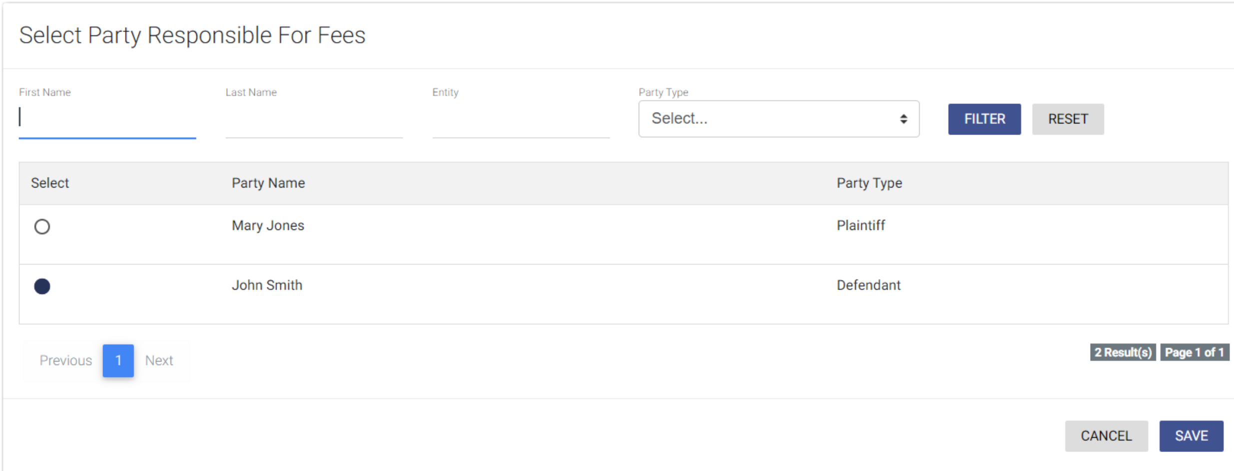
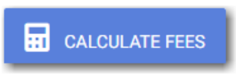



**Figure 7.92 – Select Party Responsible For Fees Window**

**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.

9. Click 

.

   The fees for the filing are displayed.

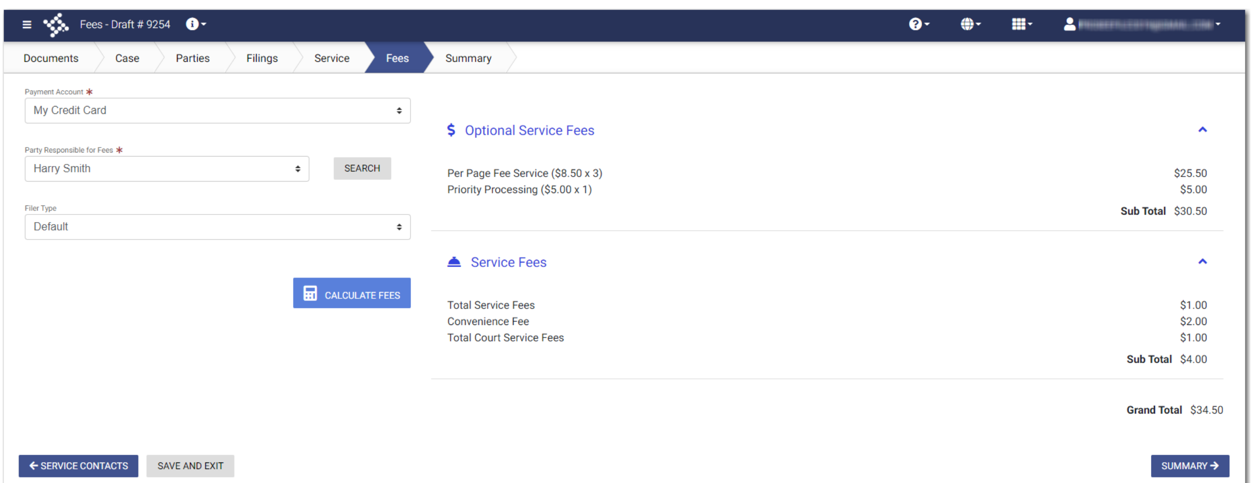



**Figure 7.93 – Example of a Fees Page with the Filing Fees Displayed**

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.

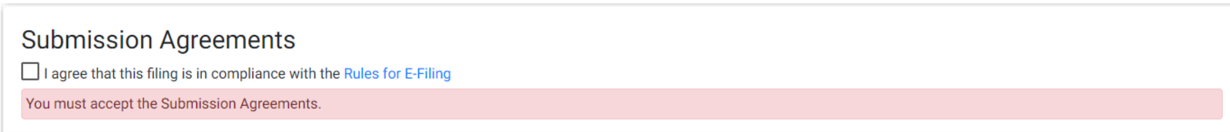



**Figure 7.94 – Submission Agreements Pane – One Disclaimer**

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

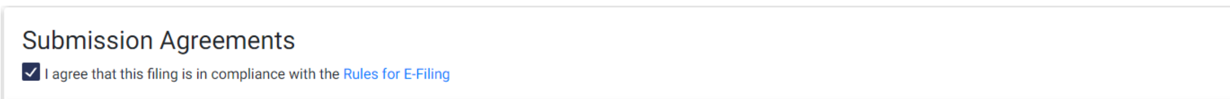



**Figure 7.95 – Submission Agreements Pane with the Check Box Selected – One Disclaimer**

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.

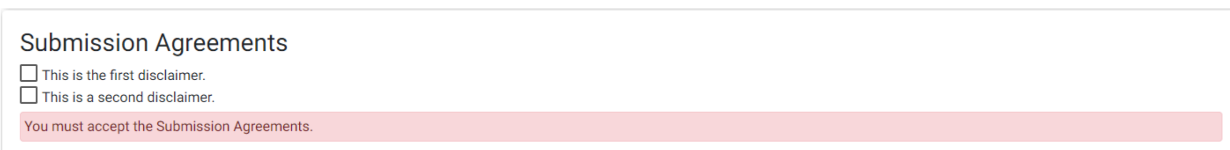



**Figure 7.96 – Submission Agreements Pane – Two Disclaimers**

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


**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.

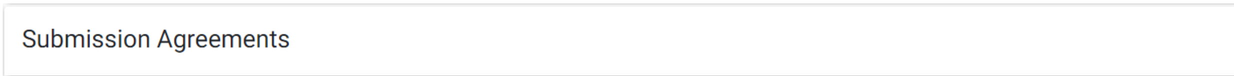



**Figure 7.98 – Submission Agreements – No Disclaimers**

# 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.

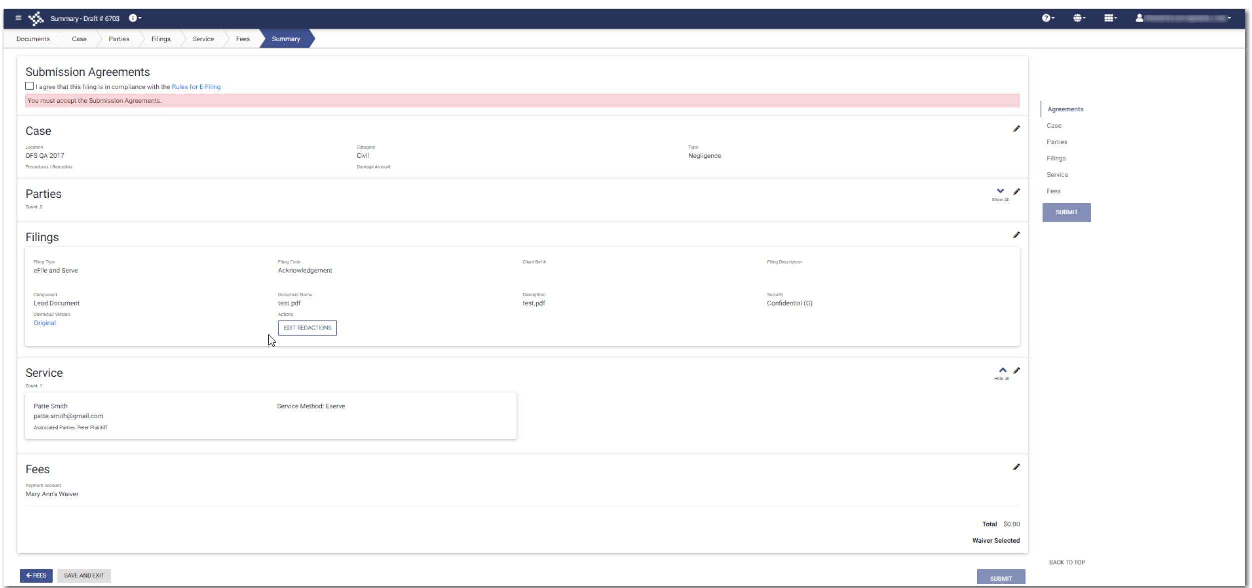



**Figure 7.99 – Sample Summary Page**

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

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

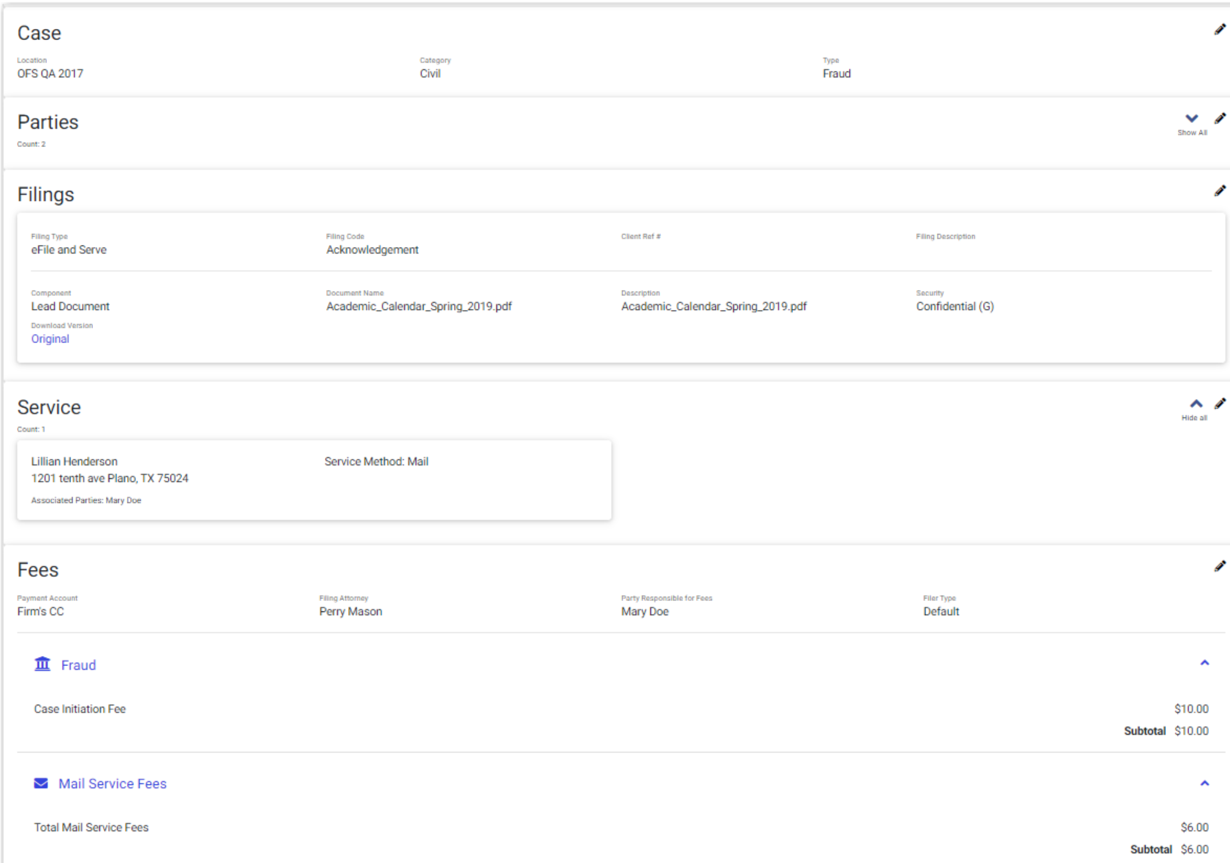



**Figure 7.100 – Sample Summary Page with Mail Service Fees Displayed**

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.

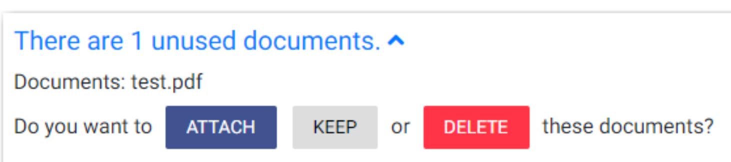
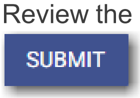



**Figure 7.101 – Unused Documents Message**

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 

.

# 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 **SUMMARY →**.

   The *Summary* page is displayed.

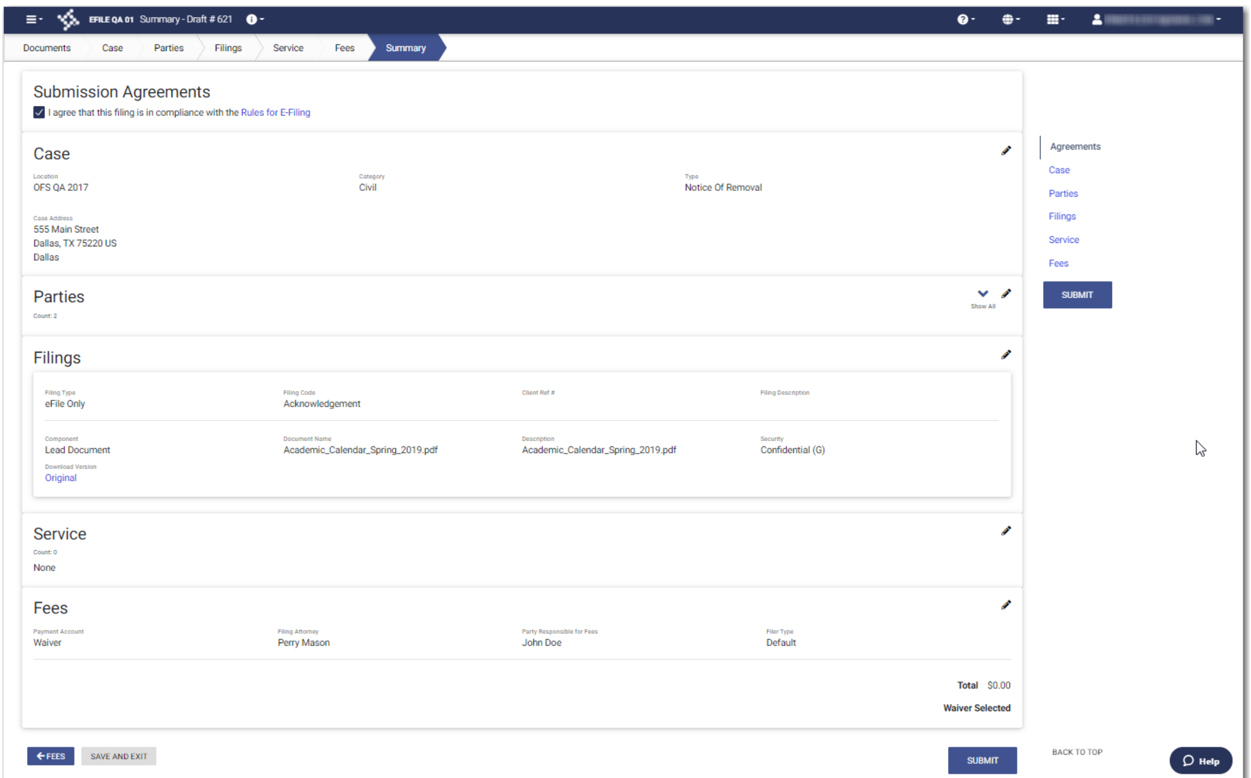



**Figure 7.102 – Case Address Information on the Summary Page**

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**.

# 8 Auto Generated Documents

**Topics covered in this chapter**



The system automatically generates some case related documents based on configuration. When configured, you can enter additional data for an initial filing on the *Case Information* page. Also, you can select Service of Process options on the *Parties* page.

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

**Note: This feature is generally used when the case category is for a civil or family case.**

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

## Collecting Additional Data on the Case Information Page

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

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

**Note: This feature is used when the case category is for a civil or family case.**

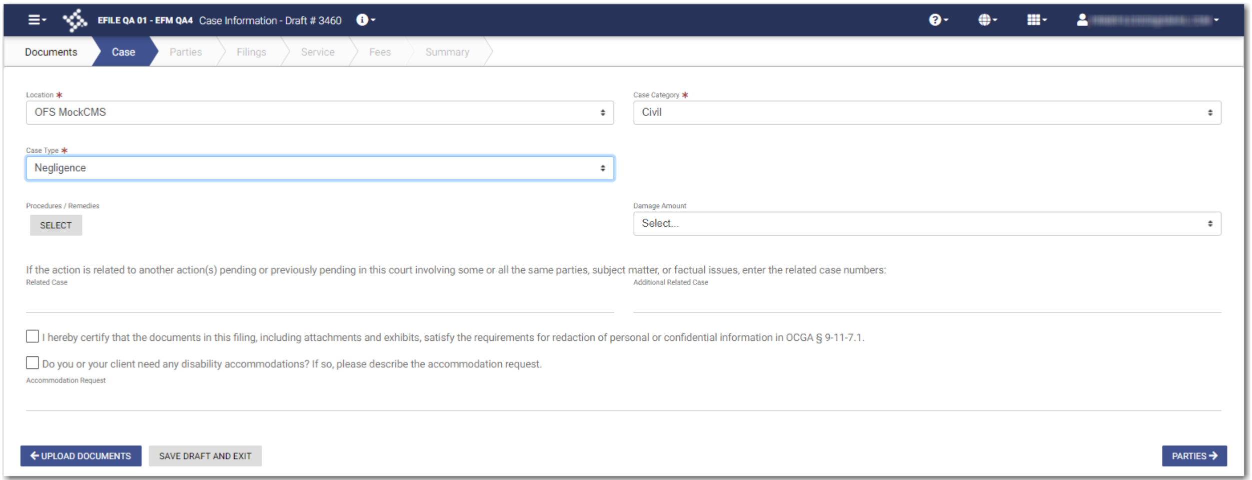
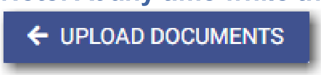



**Figure 8.1 – Additional Data Fields on the Case Information Page**

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

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

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

   **Note: The case category that you select must be Civil or Family.**
3. Select the case type from the **Case Type** drop-down list.
4. If applicable, select the procedures and remedies for the case.
5. If applicable, select the damages amount from the **Damage Amount** drop-down list.
6. Enter any related case numbers in the **Related Case** field.
7. Enter additional related case numbers in the **Additional Related Case** field.
8. Select each check box that is applicable.
9. If there is a disability accommodation to note, describe the accommodation in the **Accommodation Request** field.
10. Click 

to save your work and to continue.

# Entering Service of Process Information on the Parties Page

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

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

**Note: This feature is used when the case category is for a civil or family case.**

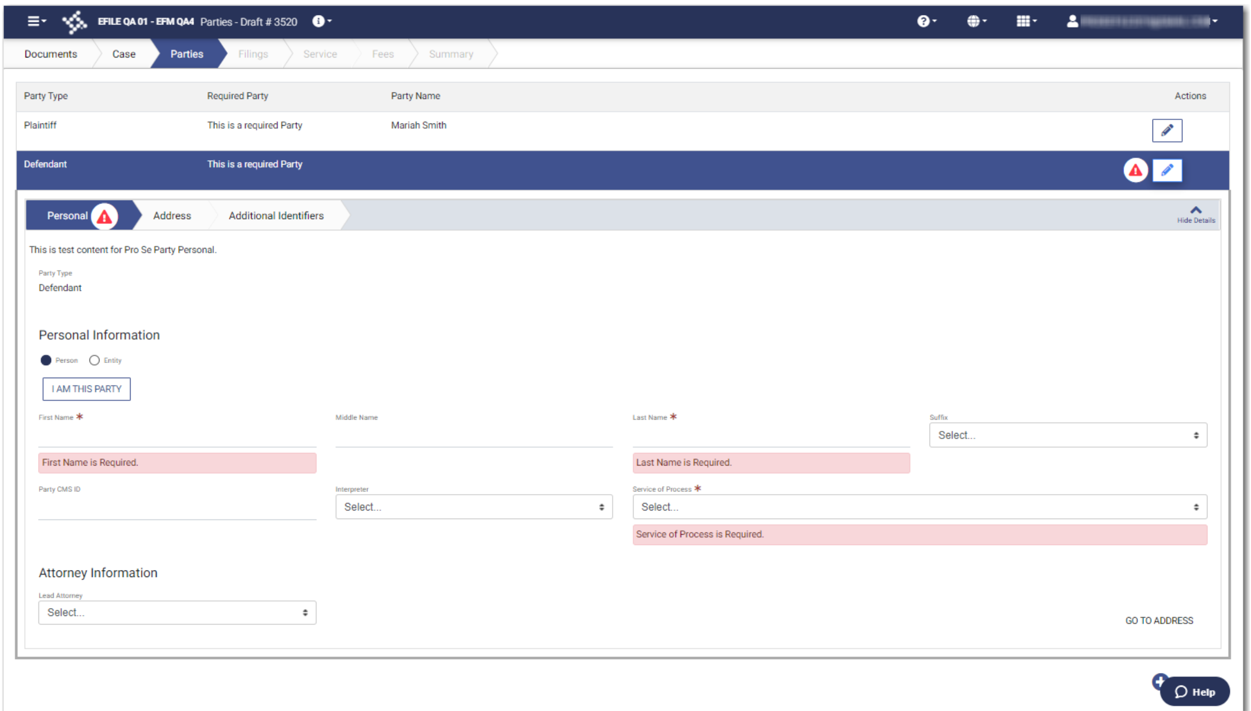



**Figure 8.2 – Example of the Personal Tab on the Parties Page—Blank**

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

1. On the **Personal** tab, select **Person** or **Entity**.
2. If you are the first party, click I AM THIS PARTY.
3. 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.

   Your name will be entered in the fields.
4. Type the party case management system ID in the **Party CMS ID** field, if appropriate.
5. Select a language from the **Interpreter** drop-down list, if appropriate.
6. Select an option from the **Service of Process** drop-down list.

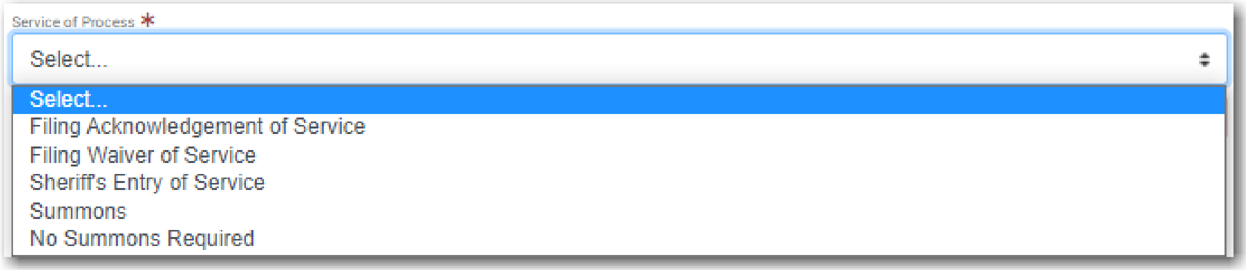



**Figure 8.3 – Example of a Service of Process Drop-Down List**

7. Select **Pro Se** for the filing attorney.
8. Complete other fields on the **Personal** tab, as applicable.

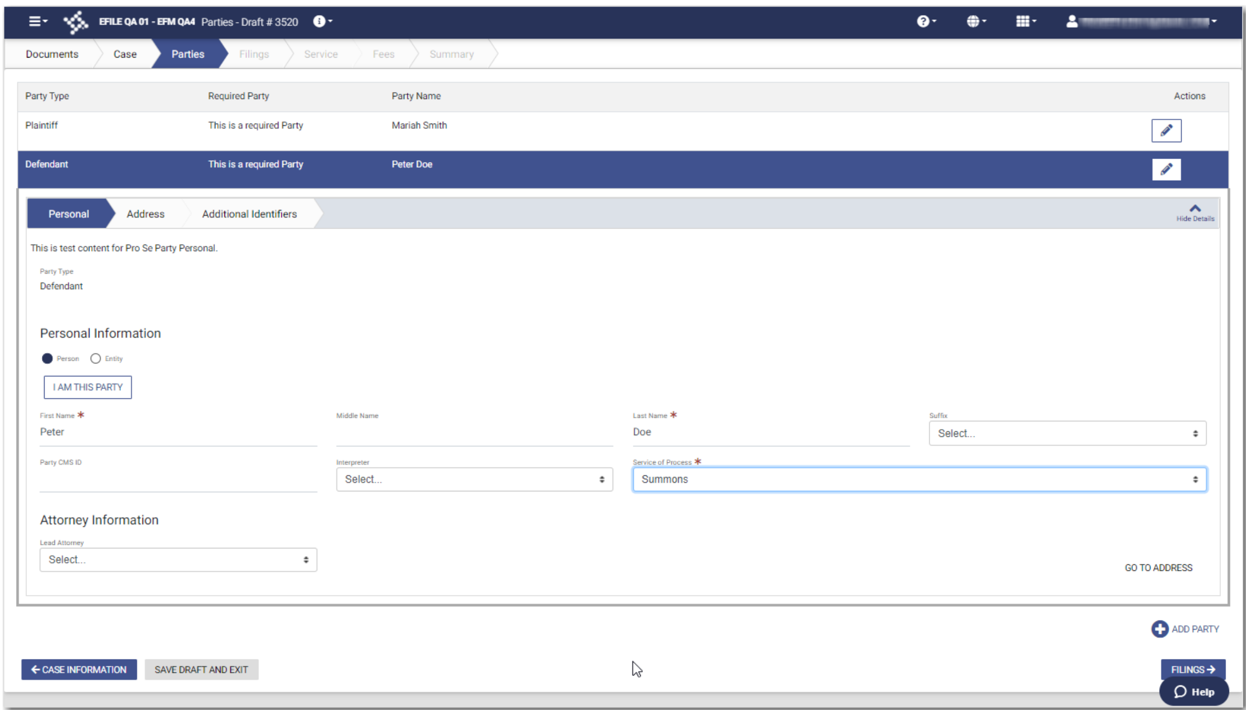



**Figure 8.4 – Example of the Personal Tab on the Parties Page with Fields Completed**

9. Click GO TO ADDRESS to enter the address information for the first party.

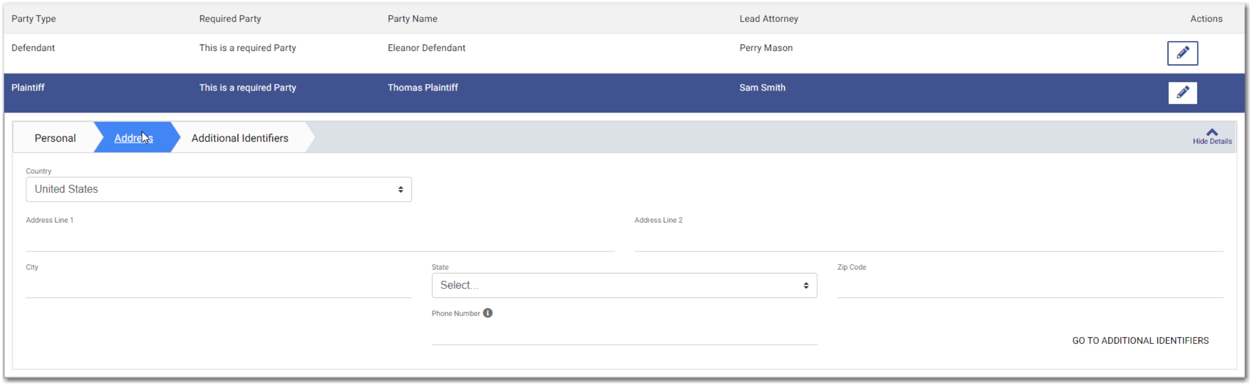
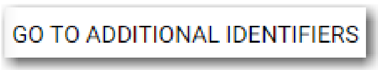



**Figure 8.5 – Address Tab on the Parties Page**

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

11. Click  to add more information for the specified party.

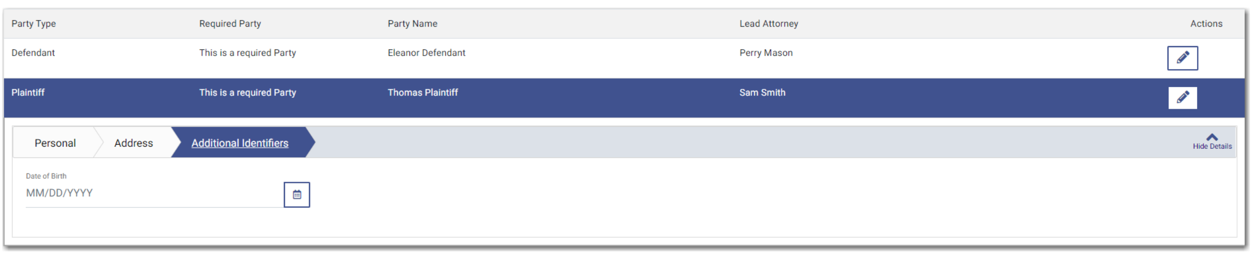
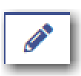




**Figure 8.6 – Additional Identifiers Tab on the Parties Page**

12. Type the party's date of birth in the **Date of Birth** field, or click  to select the date from the calendar.

13. Click  to enter information for the other required party.

14. Complete all of the required fields for the second party.

15. If you have another party to add to the case, click . Continue to add parties until all parties have been added to the case.


16. Click  to save your work and to continue.


**Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Dashboard* page. In the Drafts pane, click View My Drafts. Locate the specified draft, and then click**  **.**

# Entering Filing Details for Service of Process Cases

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

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

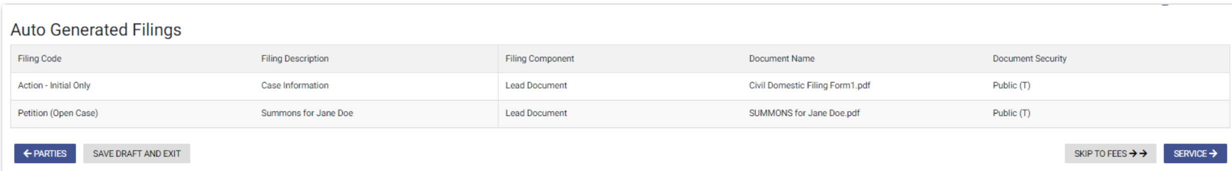



**Figure 8.7 – Example of an Auto Generated Filings Pane**

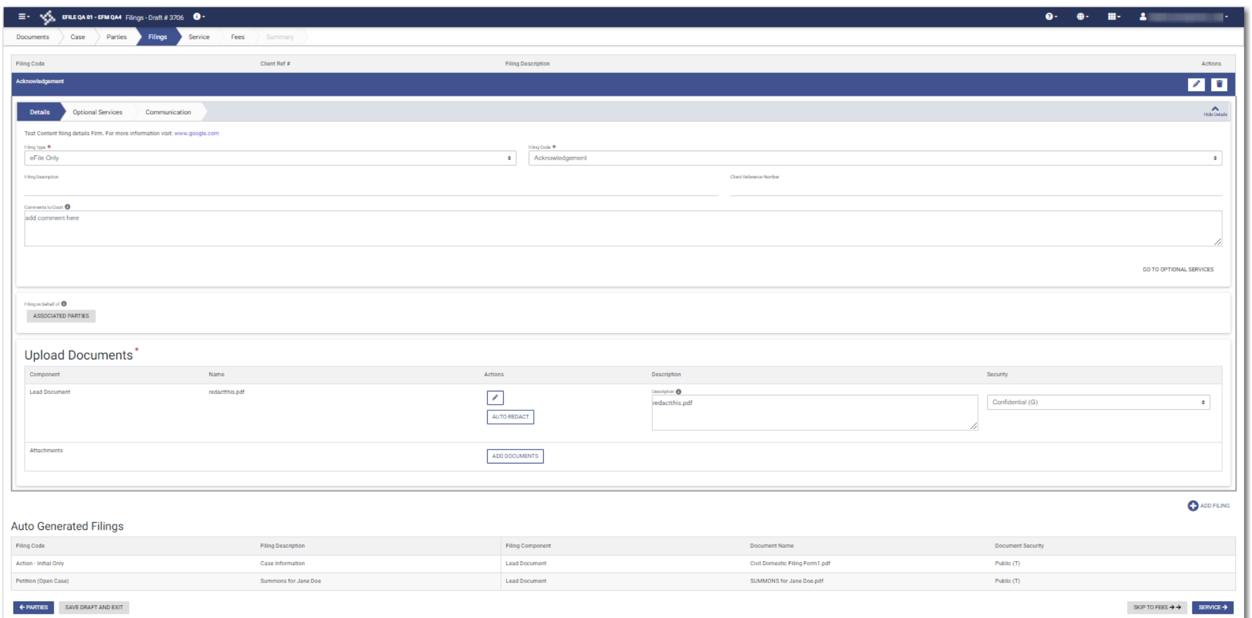
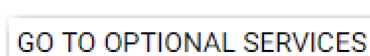



**Figure 8.8 – Example of a Filings Page with the Auto Generated Filings Pane Displayed**

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

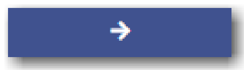
To enter the filing details:

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 

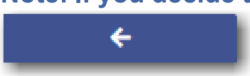
.

   The **Optional Services** tab is displayed.


**Figure 8.9 – 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**  **.**

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

9. Click ASSOCIATED PARTIES to associate parties with the filing.

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

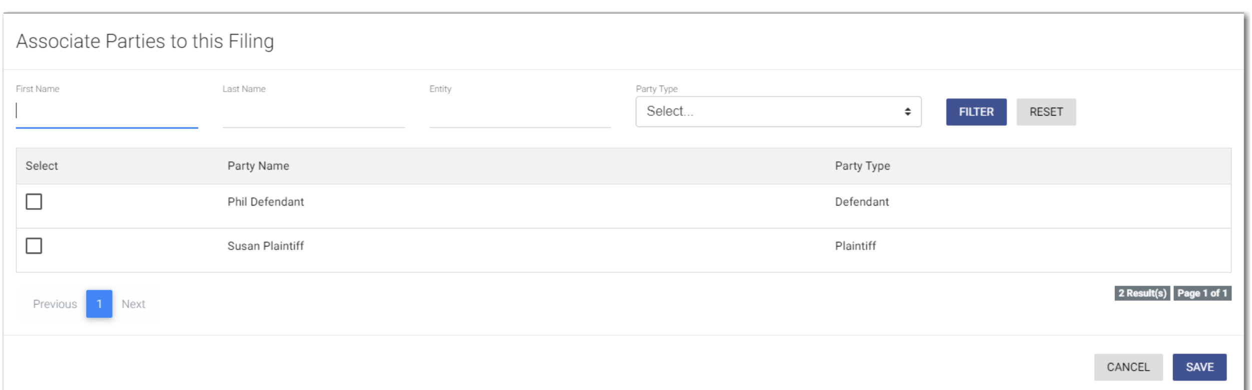



**Figure 8.10 – Associate Parties to this Filing Window**

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.

13. Click SAVE.

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.**

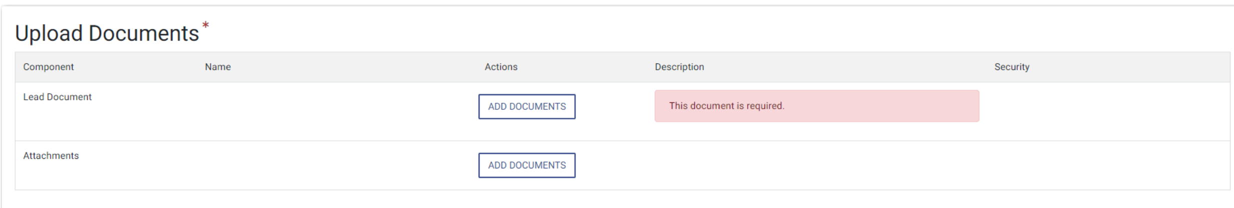



**Figure 8.11 – Upload Documents Pane**

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

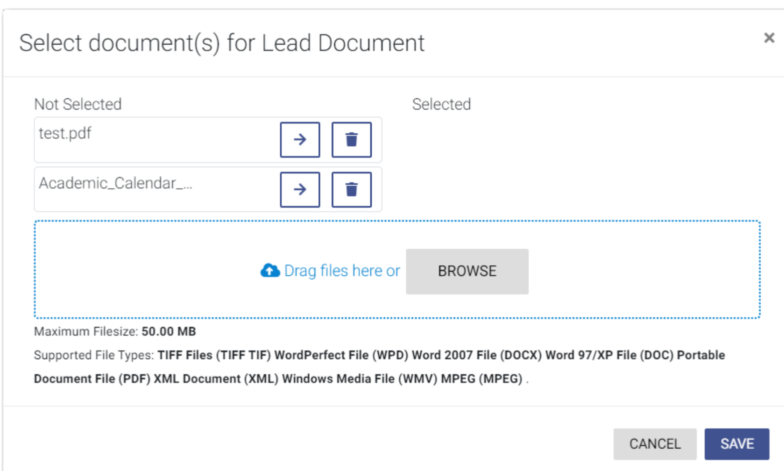



**Figure 8.12 – Select document(s) for Lead Document Window**

**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 SAVE.
17. If you have attachments to add to the filing, click ADD DOCUMENTS 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 SERVICE → or SKIP TO FEES.

# 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.**


**Figure 8.13 – 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.

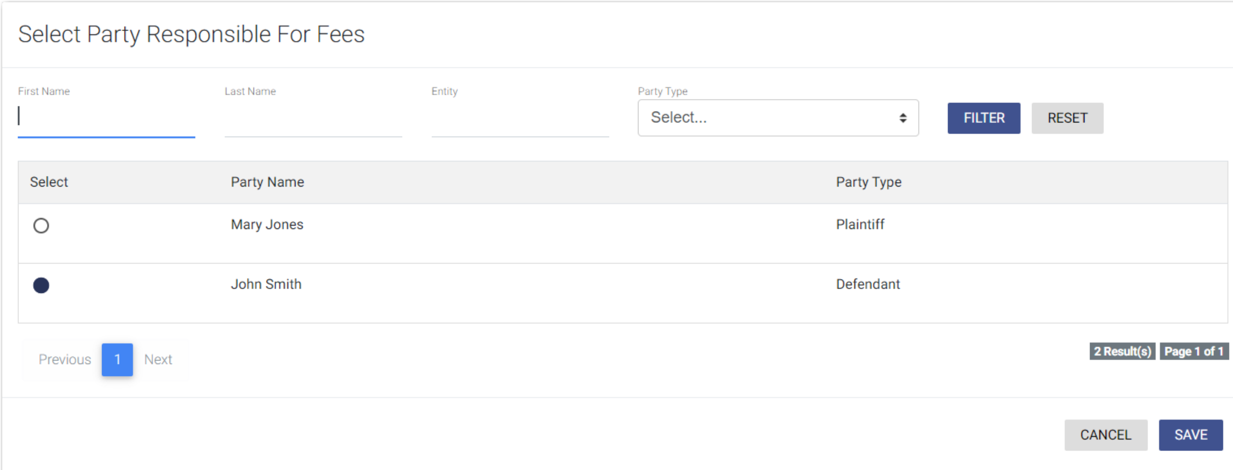



**Figure 8.14 – Select Party Responsible For Fees Window**

**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.
4. Click CALCULATE FEES.

   The fees for the filing are displayed.

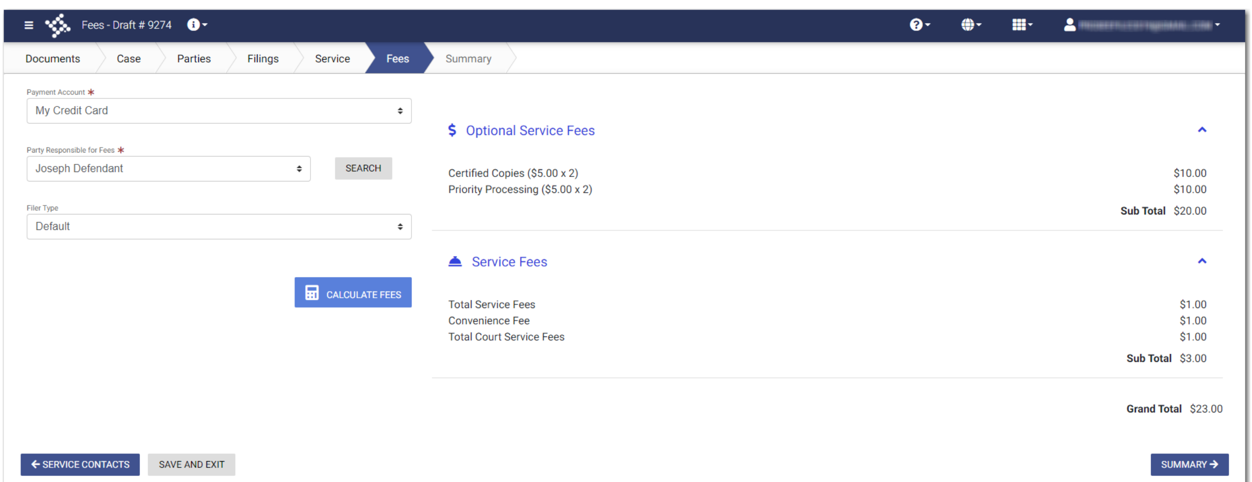



**Figure 8.15 – Example of a Fees Page with the Filing Fees Displayed**

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.**

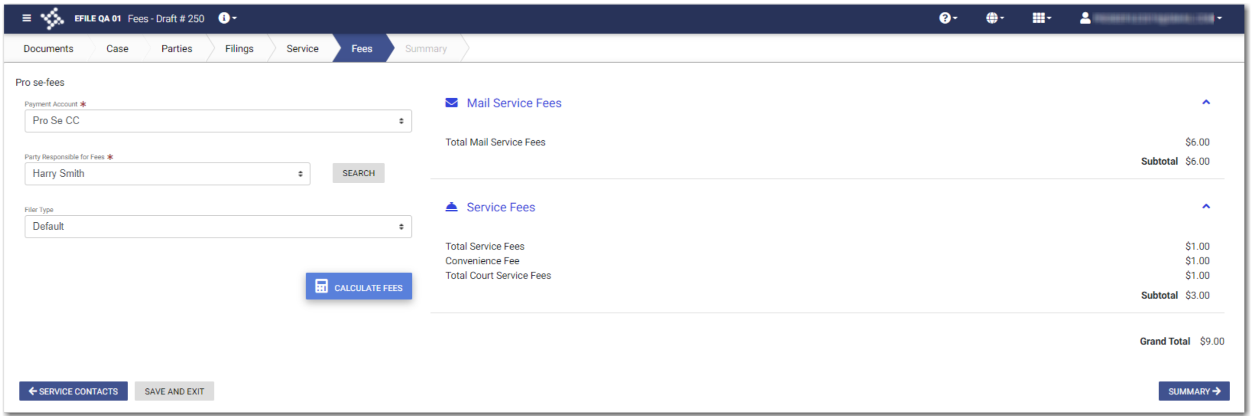



**Figure 8.16 – Example of a Fees Page with the Mail Service Fees Displayed**

5. Review the filing fees, and then click 

.

# Viewing the Envelope Summary for Service of Process Cases

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

**Note: This 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 envelope summary:

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

.

   The *Summary* page is displayed.

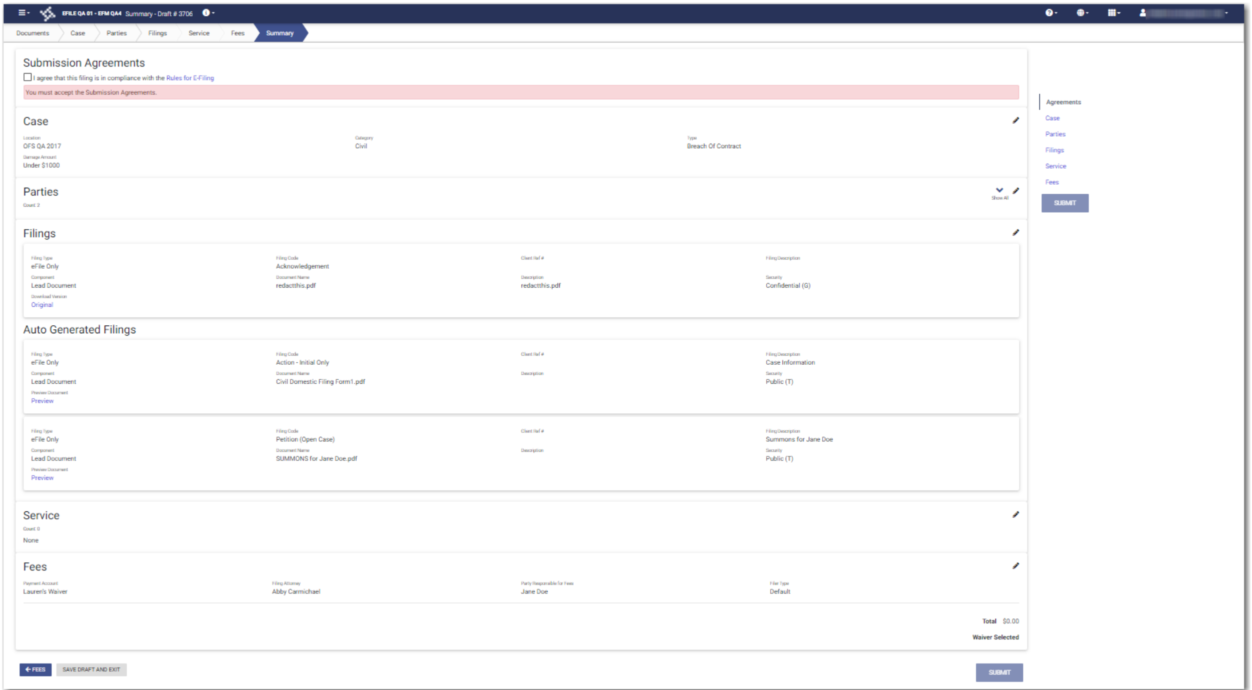



**Figure 8.17 – Sample Summary Page**

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. Also, you can preview the auto generated documents by clicking **Preview** in the Auto Generated Filings pane. After you are satisfied with the information in your filing, click 

.

# Viewing the Envelope Details for Service of Process Cases

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

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

To view the envelope details:

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

   The *Filing History* page is displayed.

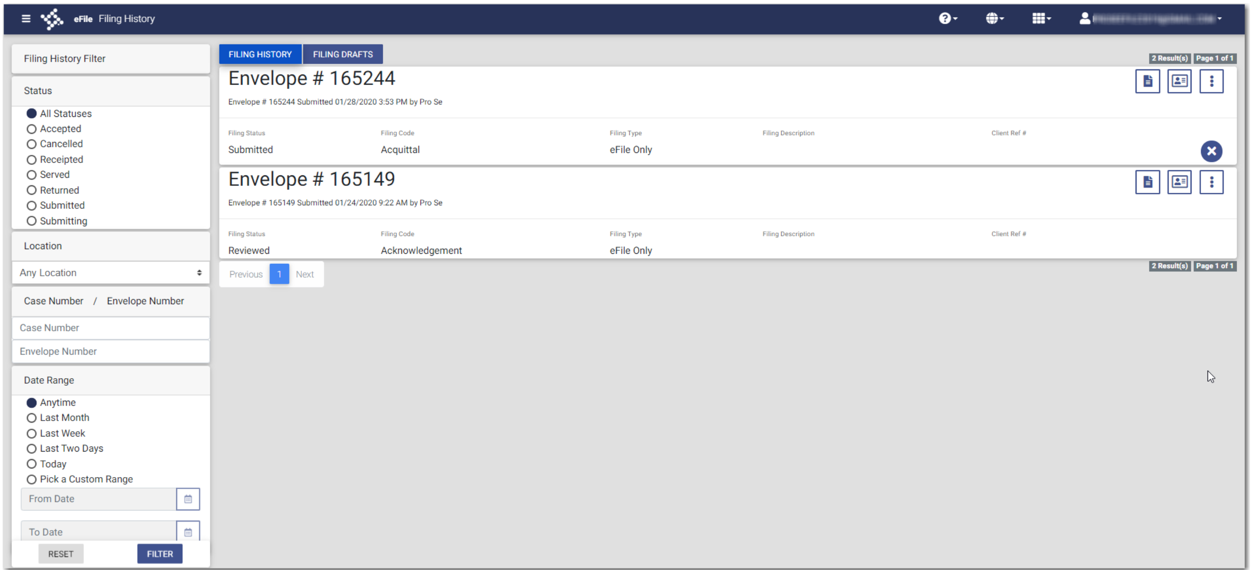



**Figure 8.18 – Filing History Page**

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

3. Click .

   The envelope details are displayed.

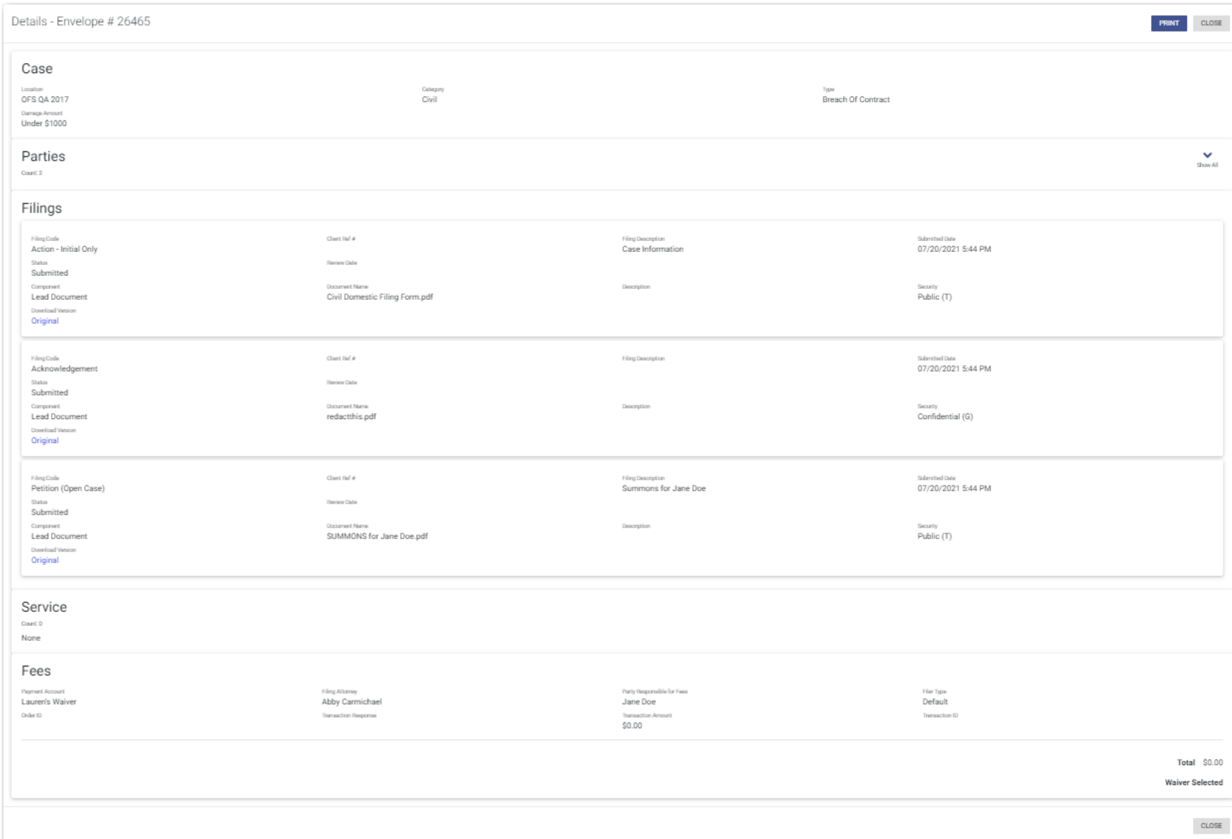



**Figure 8.19 – Sample Envelope Details Page**

4. Click 

to print a copy of the envelope details.

# 9 Redaction Feature

**Topics covered in this chapter**



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:

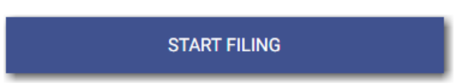
- Social Security Numbers
- Tax ID Numbers (EINs)
- Passport Numbers
- Credit Card Numbers
- Driver's License Numbers
- Account Numbers
- Government ID Numbers
- Names of Minors Listed as Parties on the Case
- Dates of Birth of Minors
- Addresses of Minors Listed on the Case

## 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 

.

   The *Start Filing* page is displayed.

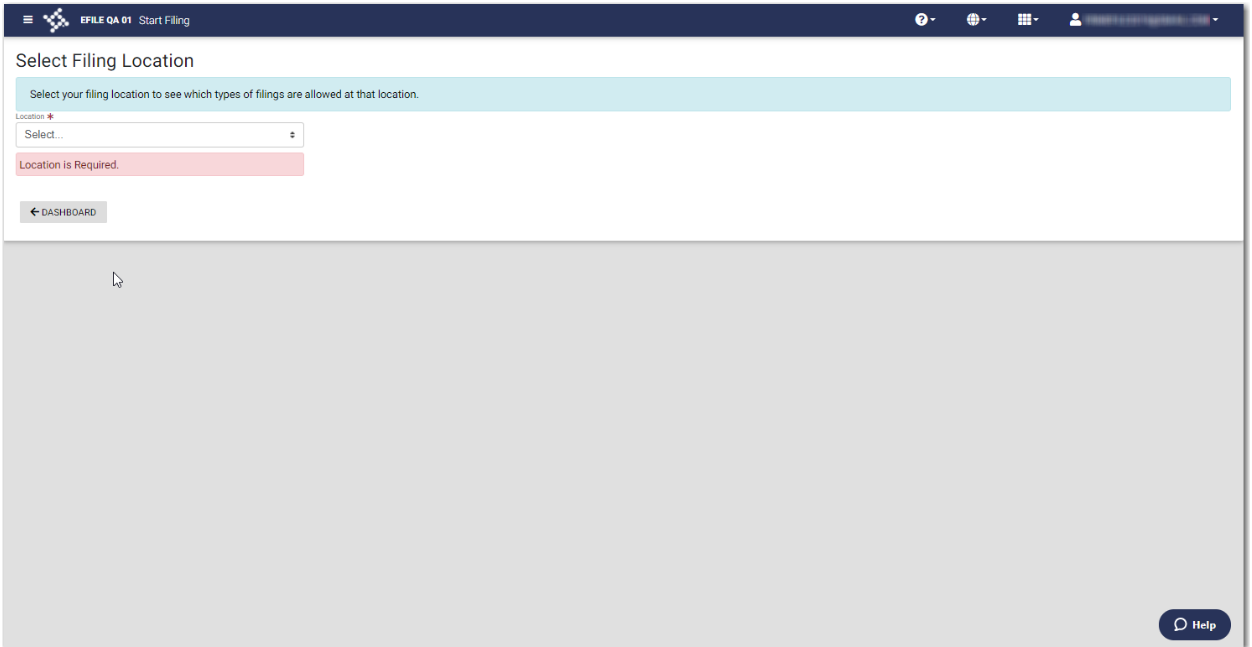



**Figure 9.1 – Start Filing Page**

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

   The New Case and the Existing Case panes are displayed.

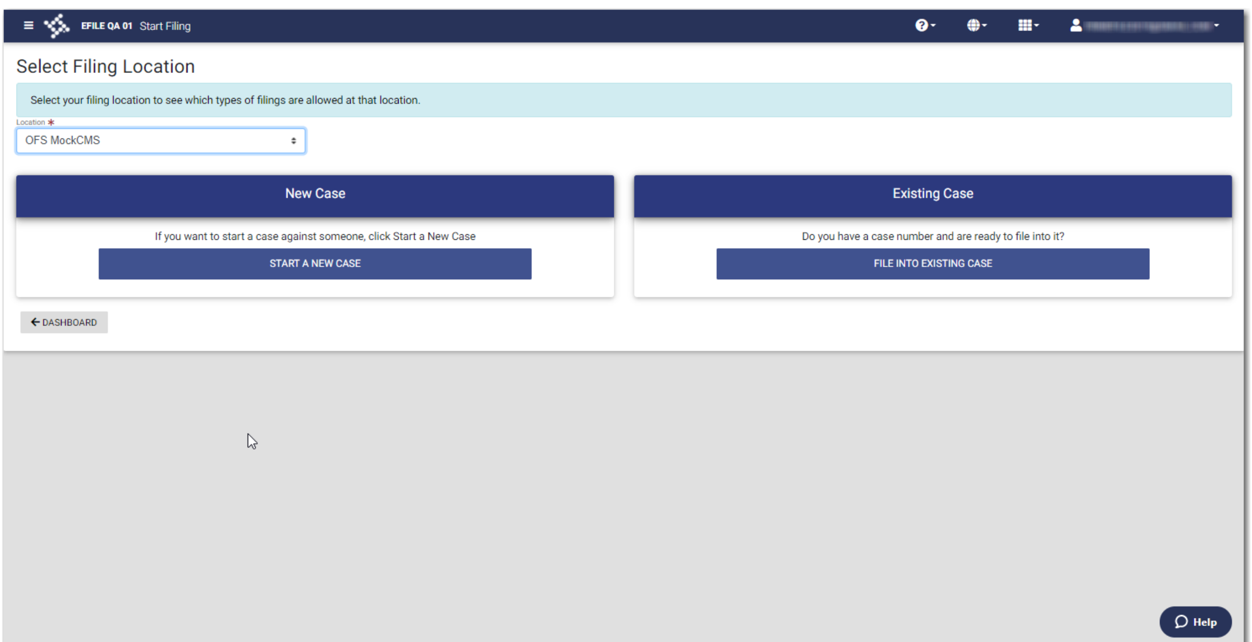



**Figure 9.2 – Start Filing Page with Case Panes Displayed**

3. Click **START A NEW CASE**

   The *Upload Documents* page is displayed.

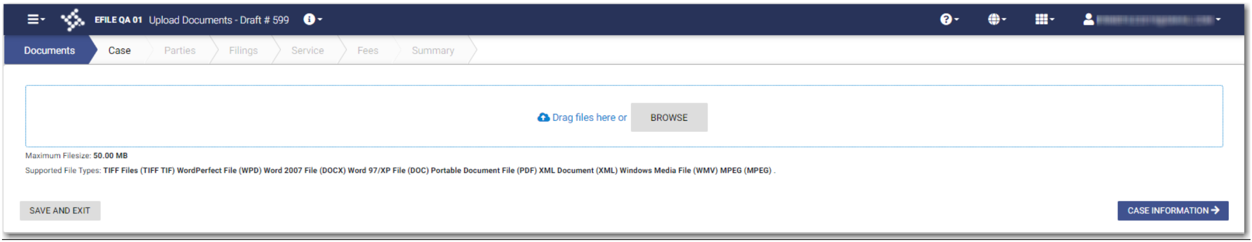



**Figure 9.3 – Upload Documents Page—Blank**

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.

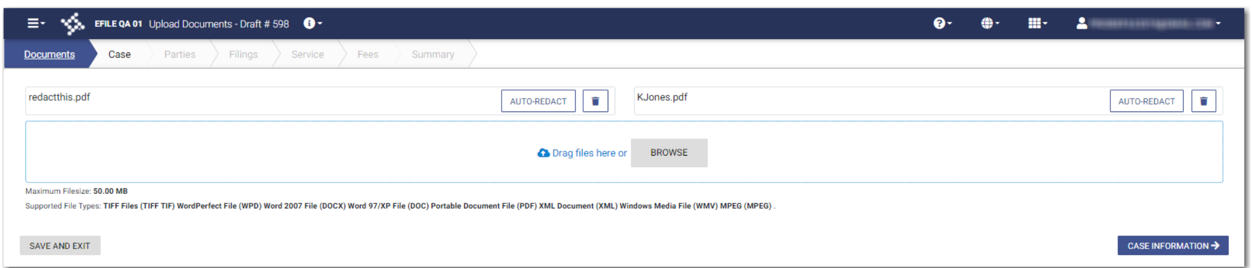



**Figure 9.4 – Upload Documents Page with an Uploaded Document**

6. Click 

.

   **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.**

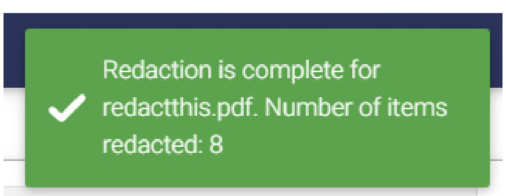



**Figure 9.5 – Example of a Message for a Completed Redaction**

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.

9. Complete the required fields on the *Parties* page, and then click **FILINGS →**.

   The *Filings* page is displayed.

10. Complete the required fields on the *Filings* page, and then click **SERVICE →**.

    The *Service* page is displayed.

11. Complete the required fields on the *Service* page, and then click **FEES**.

    The *Fees* page is displayed.

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

    The *Summary* page is displayed.

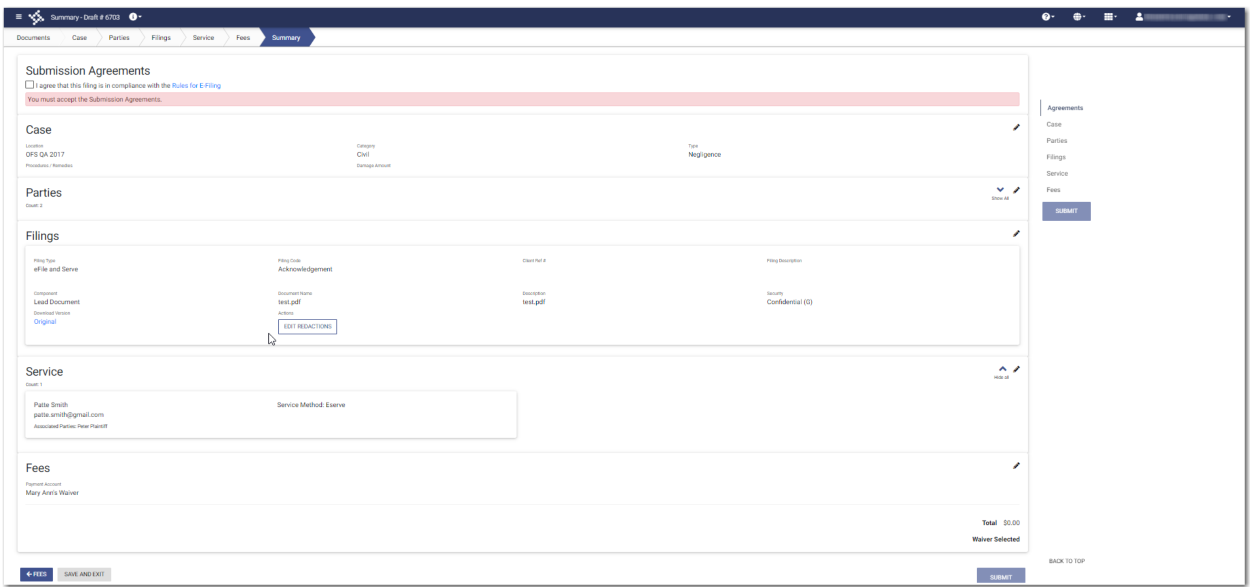



**Figure 9.6 – Sample Summary Page**

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

    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.**

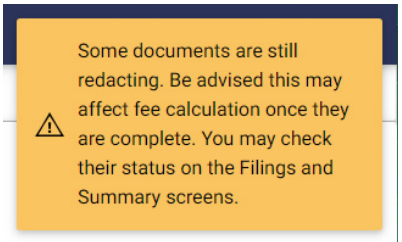
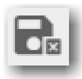
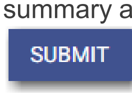



**Figure 9.7 – Example of a Message with Redaction in Progress**

14. Perform the necessary edits in the Redaction Editor, and then click  to save your changes, or click  to save your changes and close the viewer.
15. When you are done reviewing the envelope summary and have selected the check boxes for the submission agreements (if applicable), click 

.

# Deleting a Redaction

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

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

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

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

1. Right-click the specified redaction.

   The *Annotation Notes* dialog box is displayed.

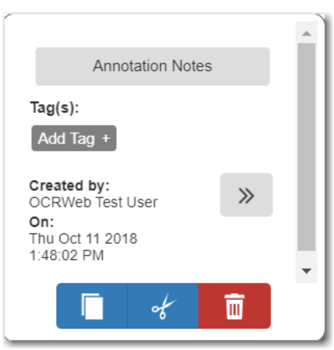



**Figure 9.8 – Annotation Notes Dialog Box**

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

**history of the redactions that were performed in the document. Click to view the detailed history.**

2. Click to delete the redaction.

   The *Delete Annotation* dialog box is displayed.

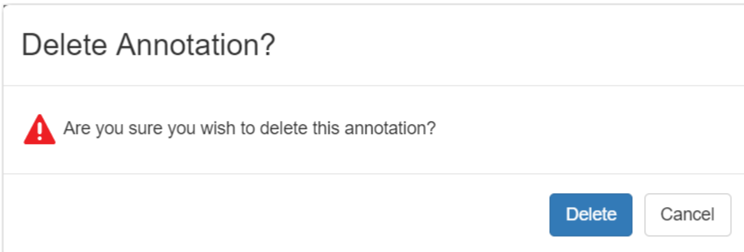



**Figure 9.9 – Delete Annotation? Dialog Box**

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:

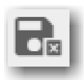
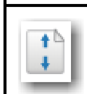
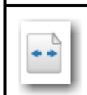
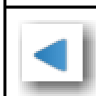
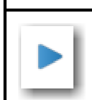
1. Turn off the manual redaction capability by clicking .
2. Locate the existing redaction that you want to resize or move, and then click the block of text.
3. Resize the redaction, or move the redaction to another location in the document.
4. When you are done, click to save your changes, or click to save your changes and close the viewer.

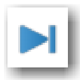
# Redaction Editor Toolbar

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).

| Icon | Description |
| --- | --- |
|  | Click this icon to begin performing a redaction. |
|  | Click this icon to stop performing a redaction. |
|  | Click this icon to save the document. |
|  | Click this icon to save and close the document. |
|  | Click this icon to close the *Tyler Content Manager* (TCM) viewer. |
|  | Click this icon to zoom in to a particular place in the document. |
|  | Click this icon to zoom out. |
|  | Click this icon to rubberband (that is, draw a border around) an area of the document in which you want to zoom. |
|  | Click this icon to magnify an area of the document. |
|  | Click this icon to fit the document to the window. |
|  | 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. |
|   | Use this window to view the current page of the document and the length of the document. |
|  | Click this icon to view the next page of the document. |

| Icon | Description |
|---|---|
|  | Click this icon to view the last page of the document. |
|  | Click this icon to rotate the document to the right. |
|  | Click this icon to rotate the document to the left. |
|  | Click this icon to download the document.<br>**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.<br>**Note: Click the icon again to close the thumbnail pane.** |

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

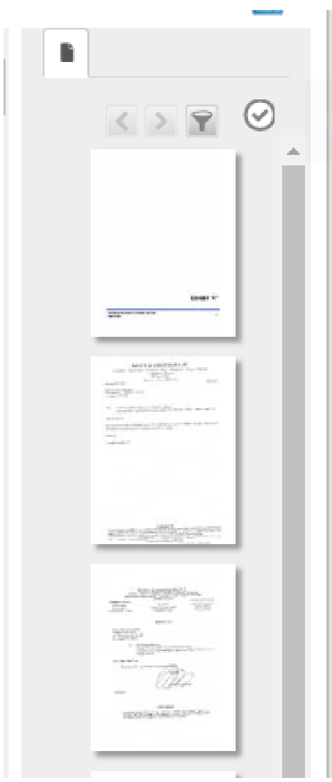
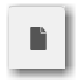
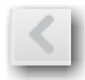


**Figure 9.10 – Sample Thumbnail Pane**

The following table describes the icons in the thumbnail pane.

| Icon | Description |
|---|---|
|  | 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. |
|  | Click this icon in the thumbnail pane to view only the pages that have a redaction on them. |

# 10 File into an Existing Case

**Topics covered in this chapter**

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

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

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

- On the *Filing History* page, locate the case that you want to file into, and then click .
- On the *Dashboard* page, click **Case Search**. In the *File into Existing Case* window that opens, enter the search criteria for the case that you want to file into. Then, click SEARCH or press ENTER.
- 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 SEARCH or press ENTER.

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

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

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

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

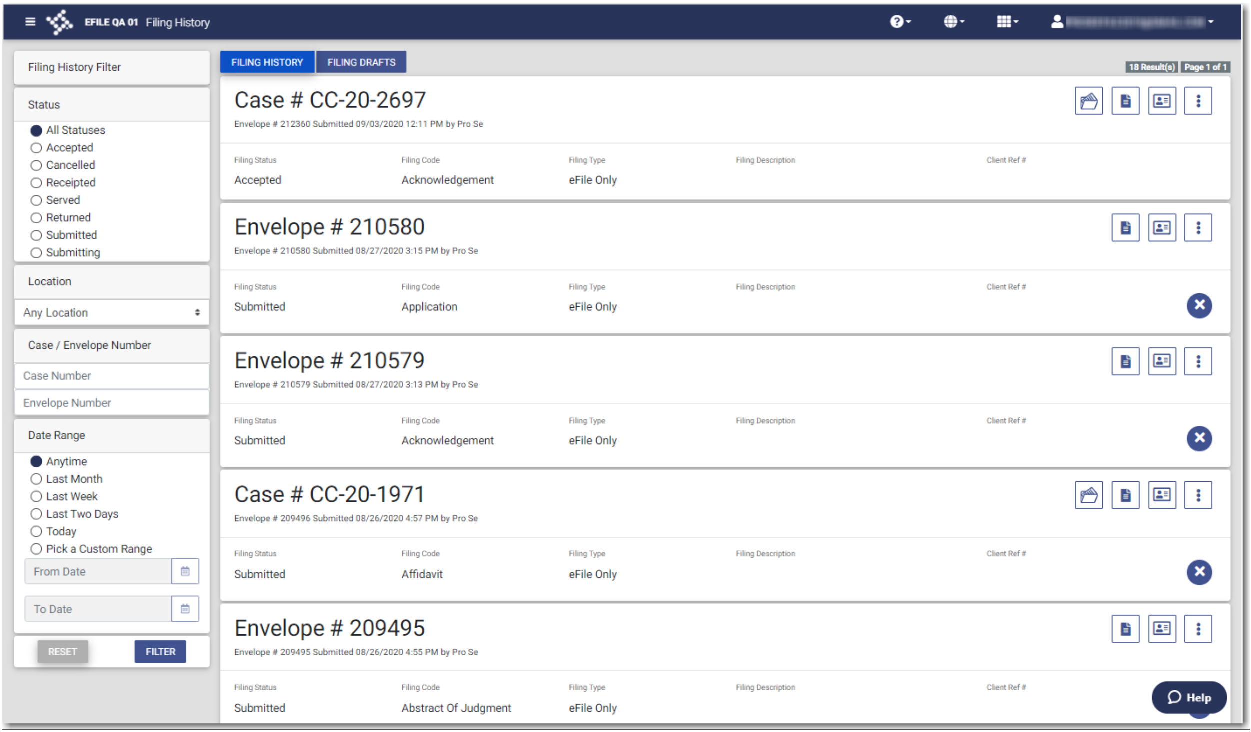



**Figure 10.1 – Example of a Filing History Page**

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 →→** if you want to go directly to the *Filings* page.

   **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.**

   **If your system is configured with this capability, ADD PARTY is displayed on the *Parties* page.**

3. On the *Filings* page, select the filing type from the **Filing Type** drop-down list.
4. Select the filing code from the **Filing Code** drop-down list.
5. Type 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.
8. if you need to apply any optional services for the filing, click **GO TO OPTIONAL SERVICES**.

   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**  **.**

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

11. Click ASSOCIATED PARTIES to associate parties with the filing.

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

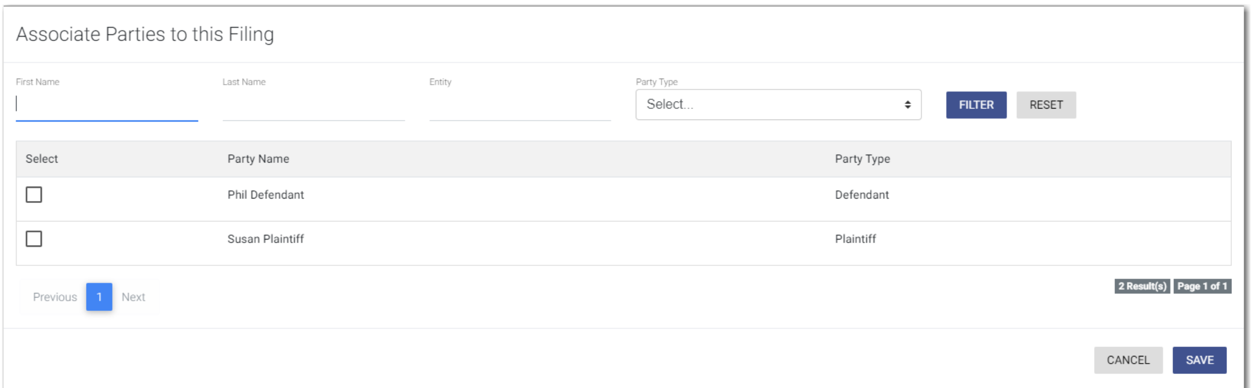



**Figure 10.2 – Associate Parties to this Filing Window**

12. Type the name of the party that you want to associate with the filing.
13. Select the relationship of the party from the **Party Type** drop-down list.
14. Select the check box for the party to which the associated party should be connected.
15. Click SAVE.
16. In the Upload Documents pane, click ADD DOCUMENTS.

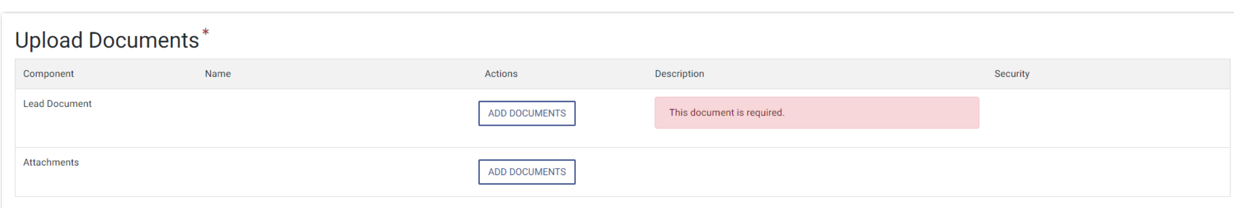



**Figure 10.3 – Upload Documents Pane**

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

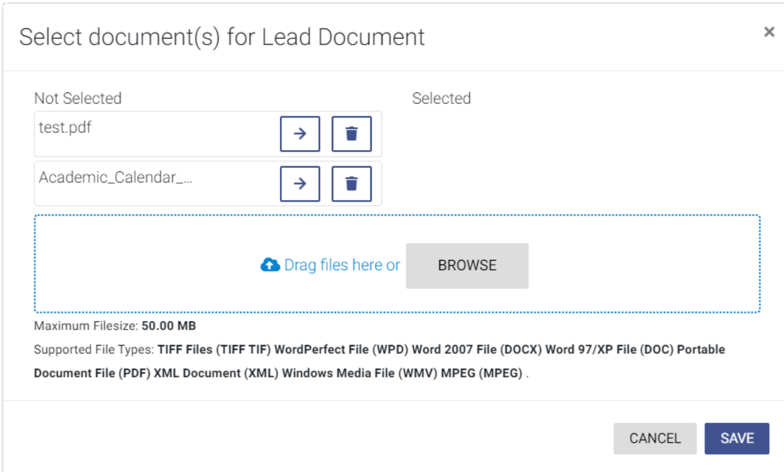



**Figure 10.4 – Select document(s) for Lead Document Window**

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 🗑.**

18. After you have added all of your lead documents, click SAVE.
19. If you have attachments to add to the filing, click ADD DOCUMENTS 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 NEXT FILING. Then, repeat the same steps for the next filing.
22. After you have added all of the filings, click either SERVICE → or SKIP TO FEES.
23. On the *Service* page, add service contacts if applicable. Then, click FEES →.
24. On the *Fees* page, select the payment account from the **Payment Account** drop-down list.
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 CALCULATE FEES if you want to view the fee total.
28. Click SUMMARY →.
29. Review the summary. If applicable, select the **Submission Agreements** check box.

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.

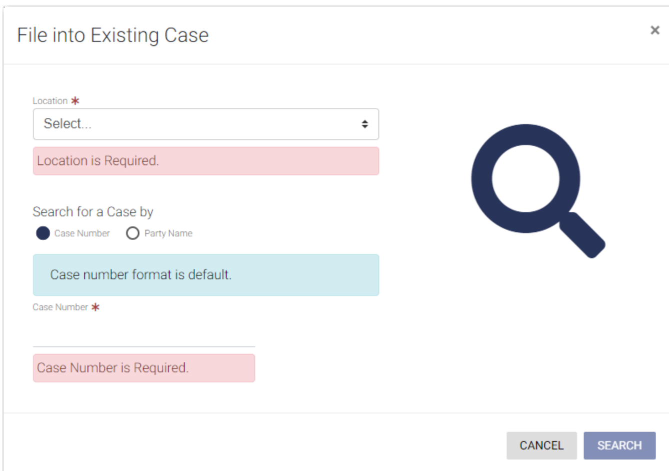



**Figure 10.5 – File into Existing Case Window—Includes Party Name Option**

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


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

2. Type the search criteria in the window, and then click SEARCH or press ENTER.

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

   The case that matches your search criteria is displayed.

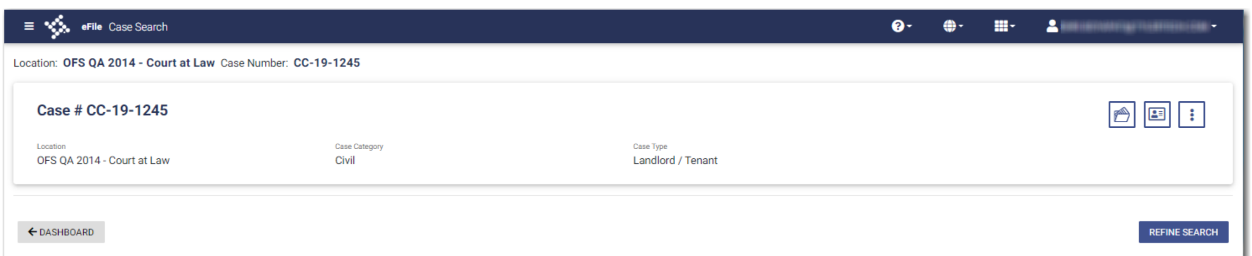



**Figure 10.7 – Case Search Results**

3. Click  to file into the case.

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

4. Click CASE INFORMATION → to enter case information, or click SKIP TO FILINGS →→ if you want to go directly to the *Filings* page.

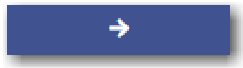
   **Note: If you choose to go directly to the *Filings* page, the case and party information from the initial case remains the same. The ability to add a new party to an existing case is configurable.**

   **If your system is configured with this capability, ADD PARTY is displayed on the *Parties* page.**

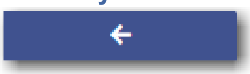
5. On the *Filings* page, select the filing type from the **Filing Type** drop-down list.
6. Select the filing code from the **Filing Code** drop-down list.

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

    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 .**

12. Click GO TO COMMUNICATION to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.
13. Click ASSOCIATED PARTIES to associate parties with the filing.

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

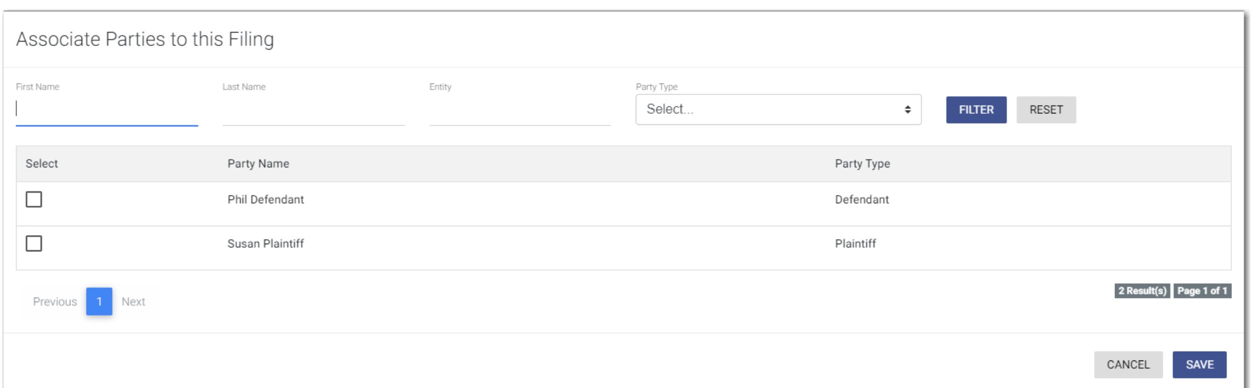



**Figure 10.8 – Associate Parties to this Filing Window**

14. Type the name of the party that you want to associate with the filing.
15. Select the relationship of the party from the **Party Type** drop-down list.
16. Select the check box for the party to which the associated party should be connected.
17. Click SAVE.
18. In the Upload Documents pane, click ADD DOCUMENTS.

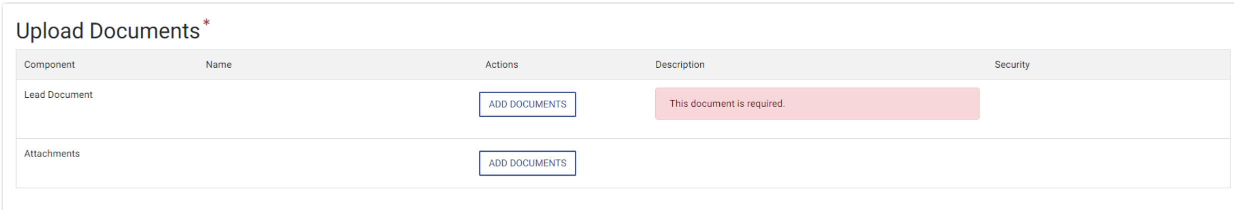



**Figure 10.9 – Upload Documents Pane**

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

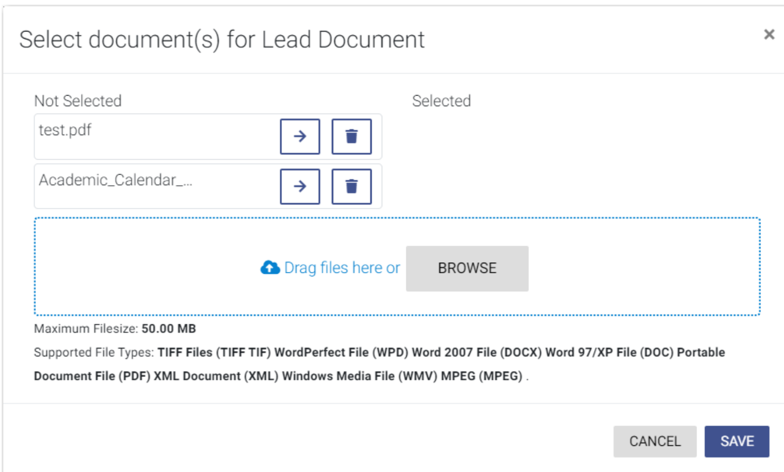



**Figure 10.10 – Select document(s) for Lead Document Window**

19. Click BROWSE to look for a document to upload. Then, click → to select the lead document.

**Note: If you want to delete a document that you have uploaded, click 🗑.**

20. After you have added all of your lead documents, click SAVE.
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 NEXT FILING. Then, repeat the same steps for the next filing.
24. After you have added all of the filings, click either SERVICE → 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 CALCULATE FEES if you want to view the fee total.
30. Click SUMMARY ➔.
31. Review the summary. If applicable, select the **Submission Agreements** check box.
32. When you are satisfied with your filing, click SUBMIT.

# Filing into an Existing Case from the Dashboard Page

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 Search Cases to locate the case that you want to file into.

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

   The *File into Existing Case* window is displayed.


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

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


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

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

 or press ENTER.

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

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

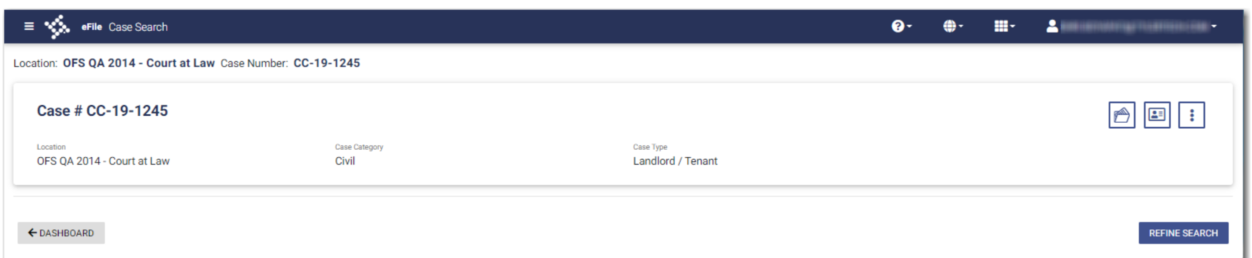
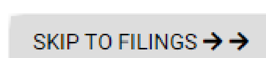



**Figure 10.13 – Case Search Page**

3. Click  to file into the case.

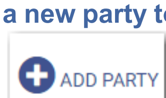
   The *Documents* page of the specified case is displayed. Any documents that were previously uploaded are displayed.

4. Click 

 to enter case information, or click 

 if you want to go directly to the *Filings* page.

   **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.**

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

 **is displayed on the *Parties* page.**

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

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

    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 ← .**

12. Click GO TO COMMUNICATION to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.
13. Click ASSOCIATED PARTIES to associate parties with the filing.

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

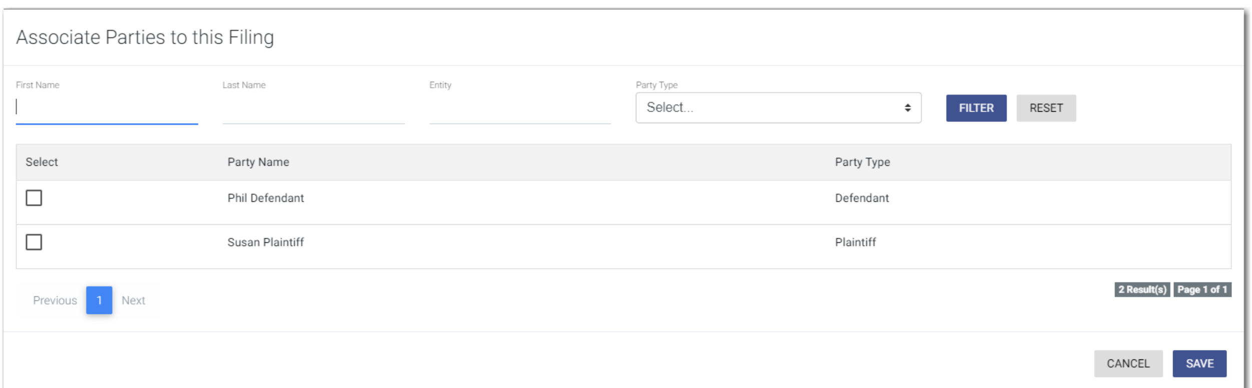



**Figure 10.14 – Associate Parties to this Filing Window**

14. Type the name of the party that you want to associate with the filing.
15. Select the relationship of the party from the **Party Type** drop-down list.
16. Select the check box for the party to which the associated party should be connected.
17. Click SAVE.
18. In the Upload Documents pane, click ADD DOCUMENTS.

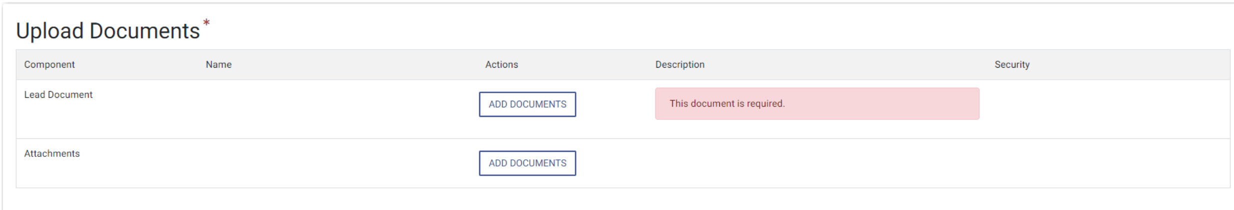



**Figure 10.15 – Upload Documents Pane**

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

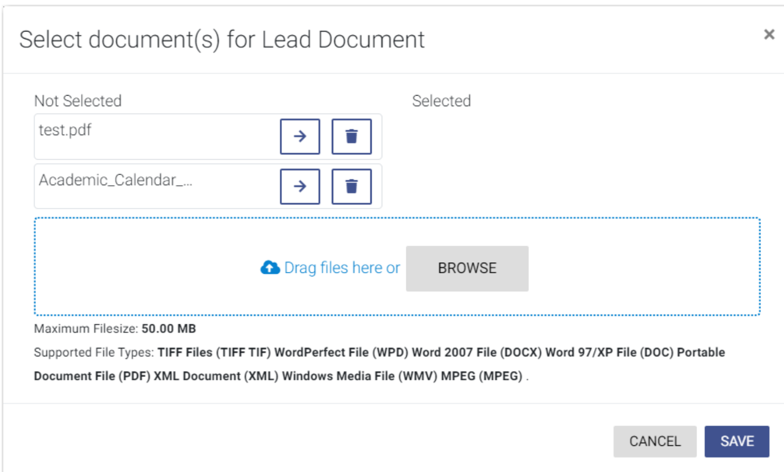



**Figure 10.16 – Select document(s) for Lead Document Window**

19. Click [BROWSE] to look for a document to upload. Then, click  to select the lead document.

**Note: If you want to delete a document that you have uploaded, click .**

20. After you have added all of your lead documents, click [SAVE].
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 [NEXT FILING]. Then, repeat the same steps for the next filing.
24. After you have added all of the filings, click either [SERVICE] 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 CALCULATE FEES if you want to view the fee total.
30. Click SUMMARY.
31. Review the summary. If applicable, select the **Submission Agreements** check box.
32. When you are satisfied with your filing, click SUBMIT.

# 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.


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

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


**Figure 10.18 – File into Existing Case Window—Excludes Party Name Option**

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

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

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

4. Click 

 or press ENTER.

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

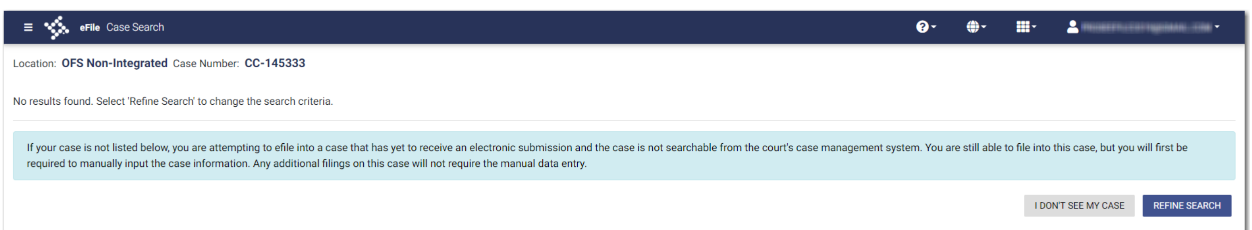
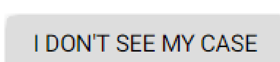



**Figure 10.19 – Case Search Window with No Results Found**

5. To continue, click 

.

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

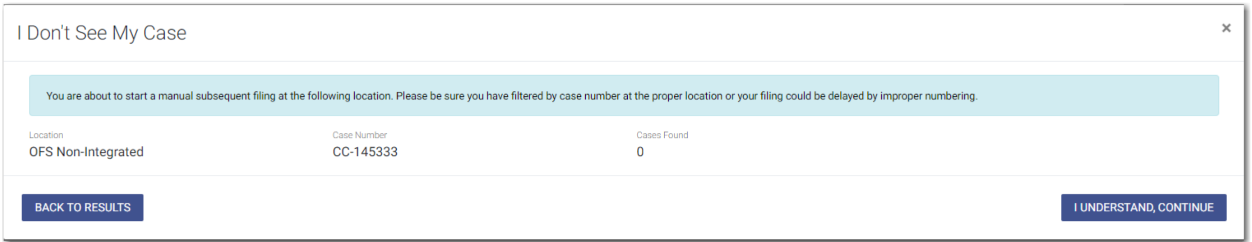



**Figure 10.20 – I Don't See My Case Window**

6. Click 

to continue filing into the case.

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

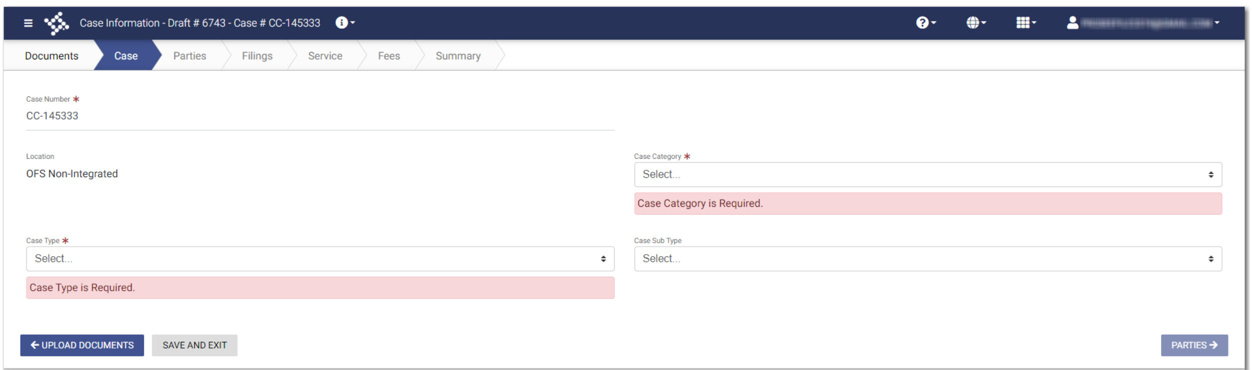
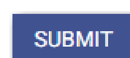



**Figure 10.21 – Case Information Page**

7. Select the case category from the **Case Category** drop-down list.
8. Select the case type from the **Case Type** drop-down list.
9. Select the case subtype, if applicable, from the **Case Sub Type** drop-down list.
10. Click 

to save your work and continue.
11. Continue entering case information on the following pages until you reach the *Summary* page.
12. Review your filing. When you are satisfied with the information you have entered, click 

.

# Creating a Service Only Filing

To create a Service Only filing:

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

   **Note: The *Case* and *Parties* pages are already populated since this is an existing case.**
3. On the *Filings* page, select **Service Only** from the **Filing Type** drop-down list.
4. In the Upload Documents pane, click ADD DOCUMENTS.

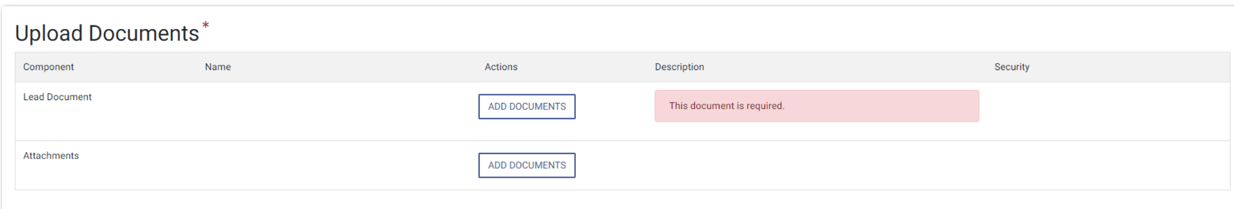



**Figure 10.22 – Upload Documents Pane**

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

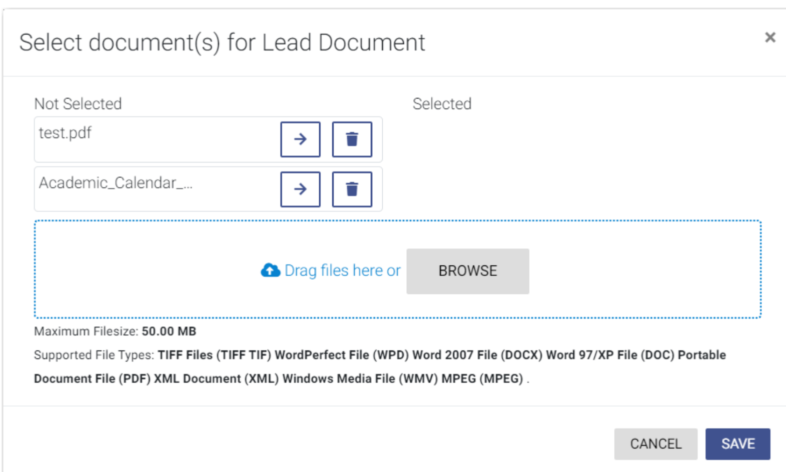



**Figure 10.23 – Select Document(s) for Lead Document Window**

5. 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 🗑.**
6. After uploading your documents, click SAVE.
7. If you want to add security to any of the documents, select an option from the **Security** drop-down list.

8. Click 

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

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

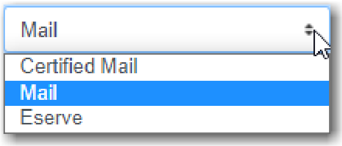



**Figure 10.24 – Sample Service Method Drop-Down List**

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

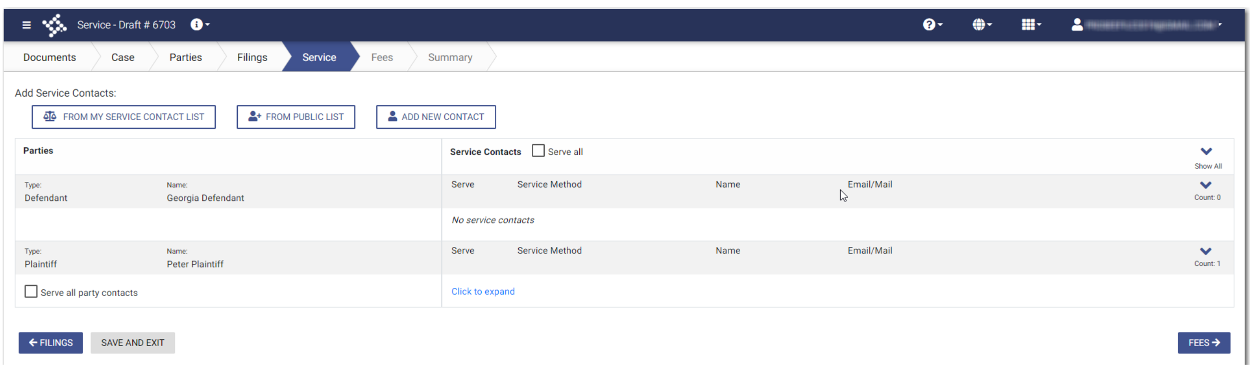



**Figure 10.25 – Example of a Service Page for a Service Only Filing**

11. Click 

to save your entries and to continue.
12. Complete the required fields on the *Fees* page, and then click 

.
13. Select the check boxes for the submission agreements, if applicable.
14. Review the information on the *Summary* page, and then click 

.

# 11 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.

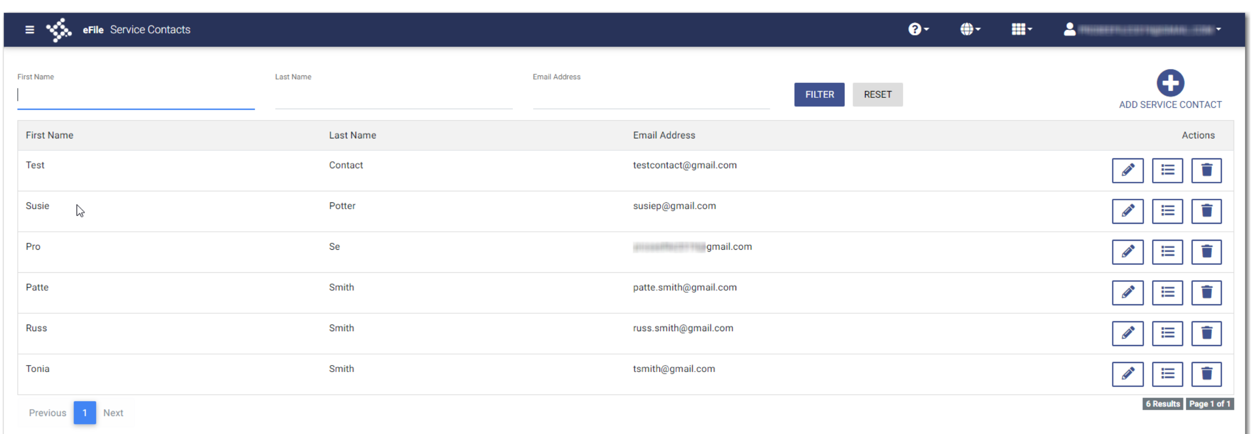



**Figure 11.1 – Service Contacts Page**

2. Click 

.

Additional fields are displayed.

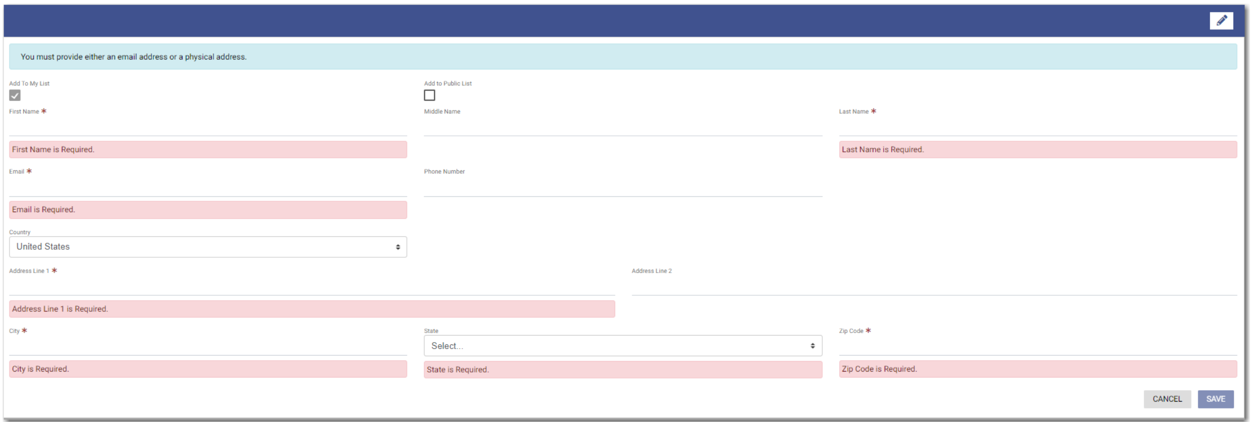



**Figure 11.2 – Service Contacts – Additional Fields**

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.

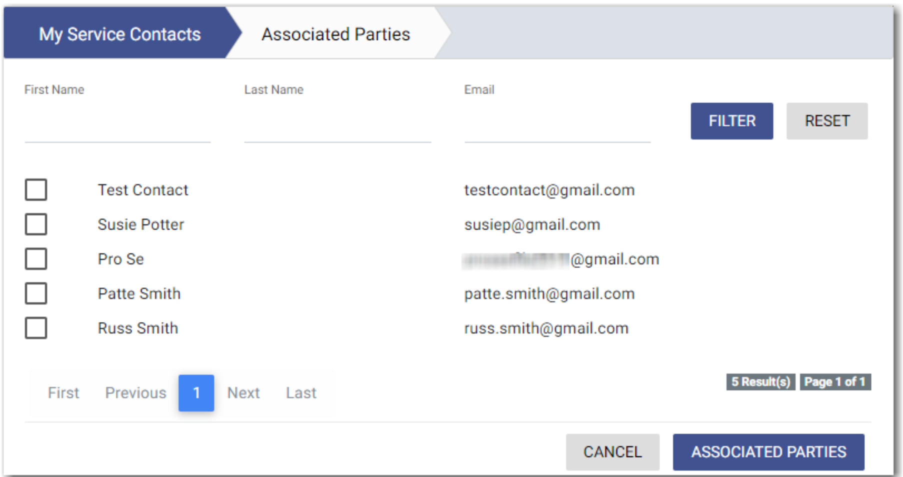
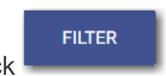



**Figure 11.3 – My Service Contacts Window**

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.

4. After you have selected the contacts for your filing, click 

.

   The *Associated Parties* window is displayed.

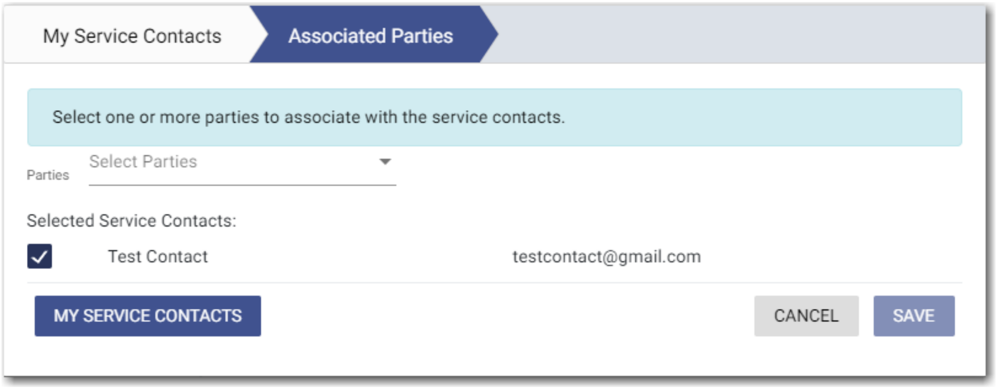



**Figure 11.4 – Sample Associated Parties Window**

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

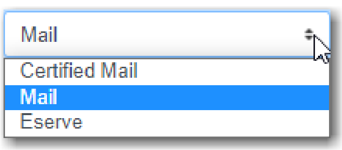



**Figure 11.5 – Sample Service Method Drop-Down List**

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

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

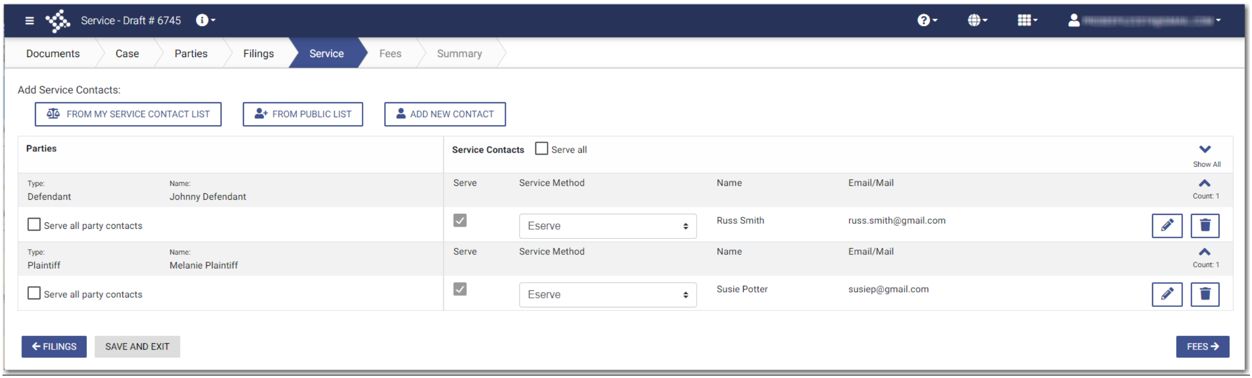



**Figure 11.6 – Example of a Service Page in a Case Filing**

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

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

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

1. On the *Service* page, click 

.

   The *Public Service Contacts* window is displayed.

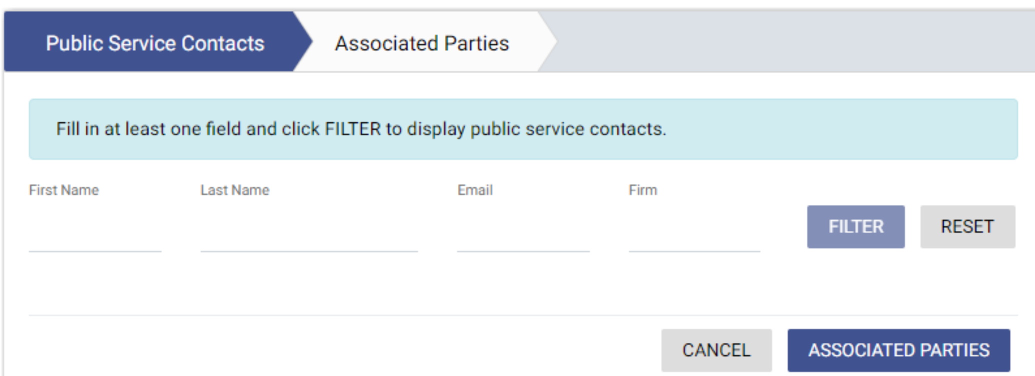
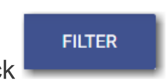



**Figure 11.7 – Public Service Contacts Window**

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.

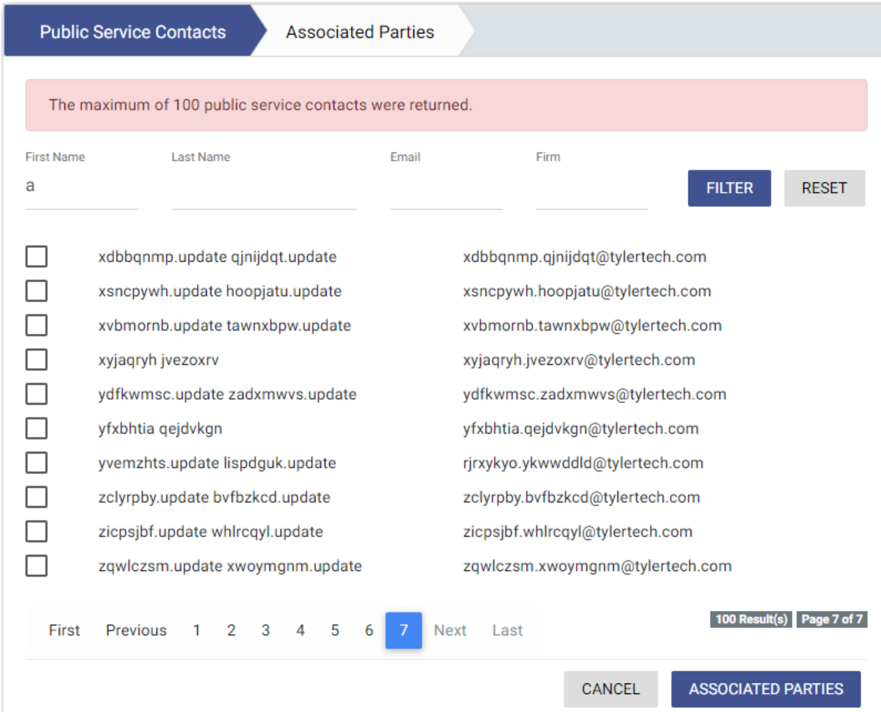



**Figure 11.8 – Sample Public Service Contacts List**

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

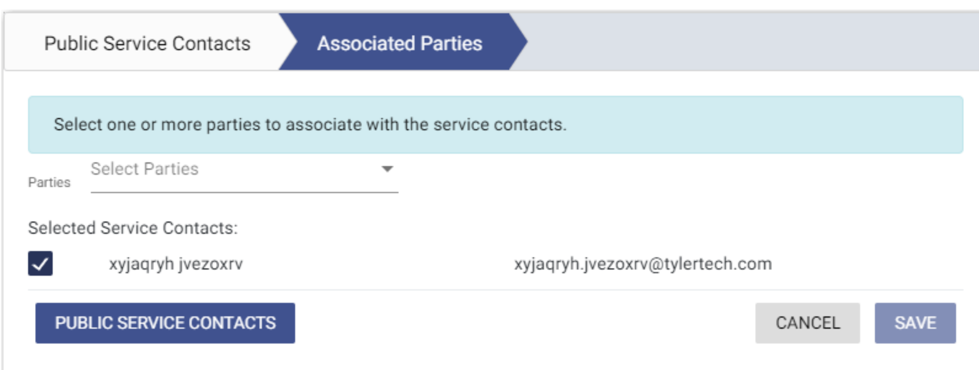



**Figure 11.9 – Sample Associated Parties Window**

6. Select the party that you want to associate with the selected service contact or contacts from the **Parties** drop-down list, and then click 

.

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.**

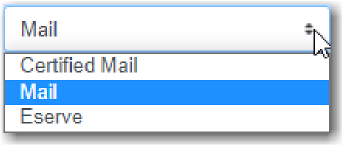



**Figure 11.10 – Sample Service Method Drop-Down List**

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

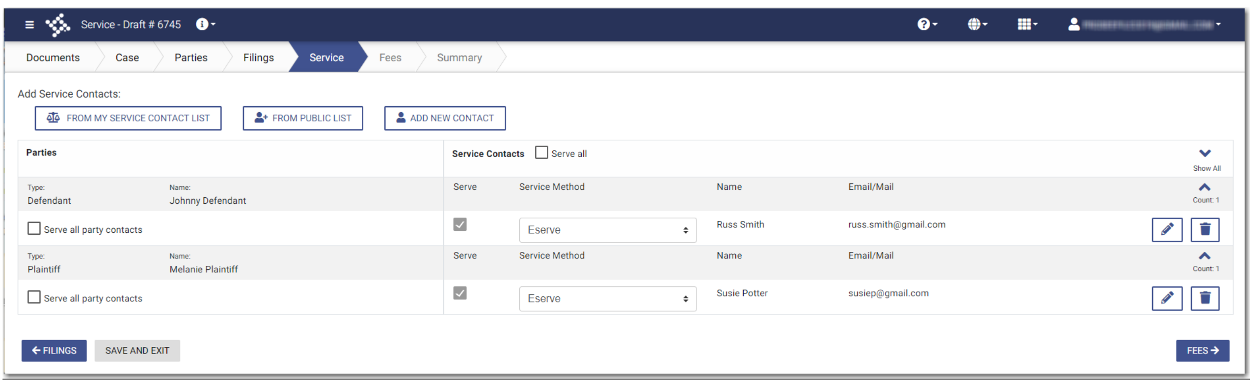



**Figure 11.11 – Example of a Service Page in a Case Filing**

# Adding a New Service Contact to a Filing

You can add a new service contact to a filing.

To add a new service contact to a filing:

1. On the *Service* page, click ADD NEW CONTACT.

   The *Add Service Contact* window is displayed.

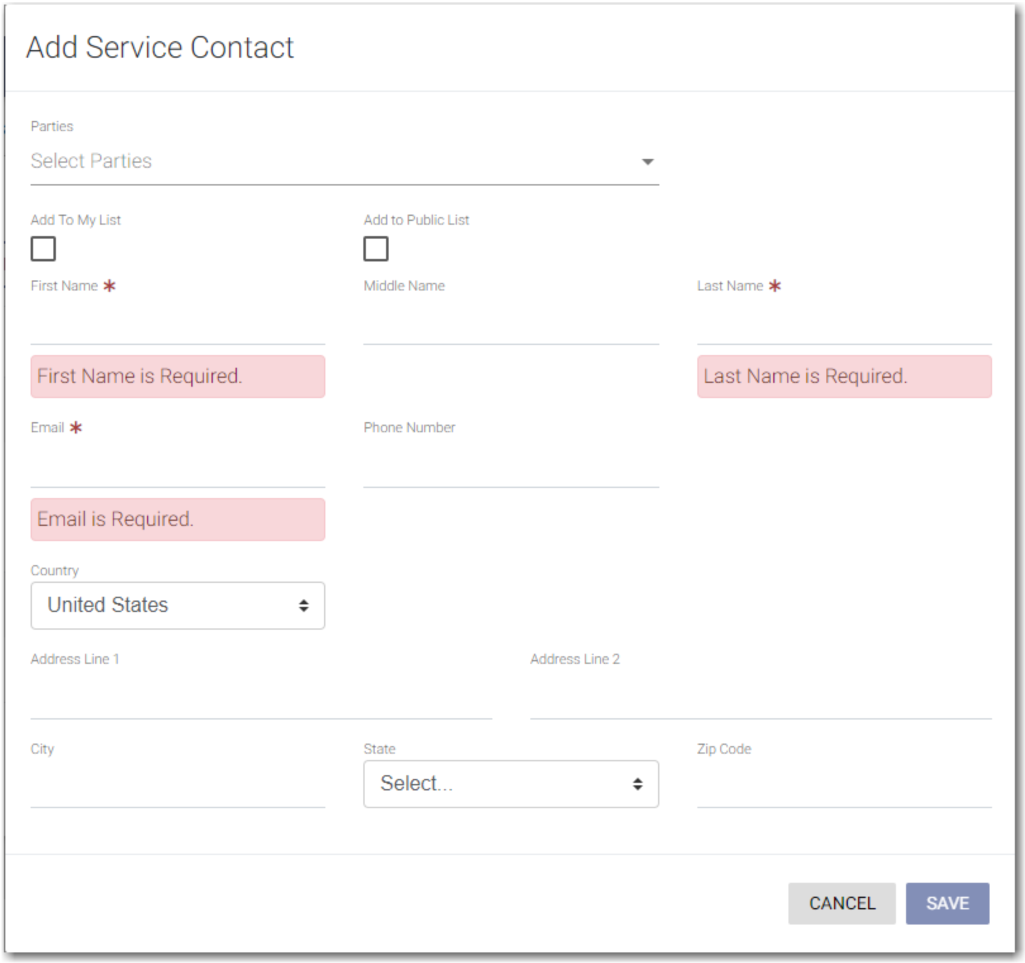



**Figure 11.12 – Add Service Contact Window**

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.

12. After you have entered the required information, click **SAVE**.

13. After you have added the contact for your filing, click **ASSOCIATED PARTIES**.

    The *Associated Parties* window is displayed.

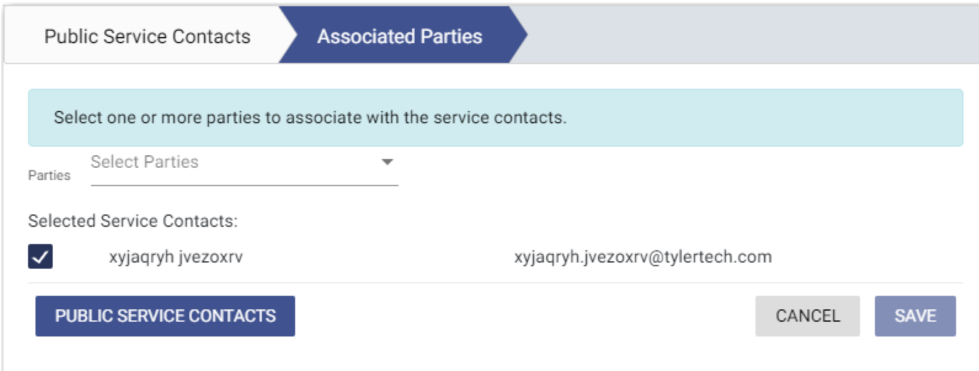



**Figure 11.13 – Sample Associated Parties Window**

14. Select the party that you want to associate with the selected service contact from the **Parties** drop-down list, and then click **SAVE**.

    **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.**

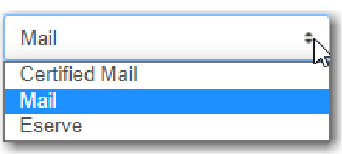



**Figure 11.14 – Sample Service Method Drop-Down List**

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

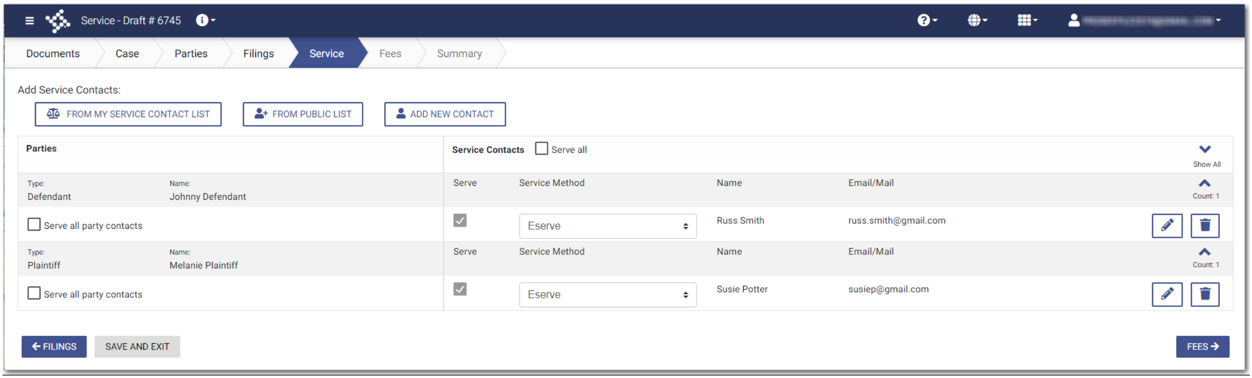



Figure 11.15 – Example of a Service Page in a Case Filing

# Updating Information for an Existing Service Contact

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

To update the information for an existing service contact:

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

   The *Service Contacts* page is displayed.

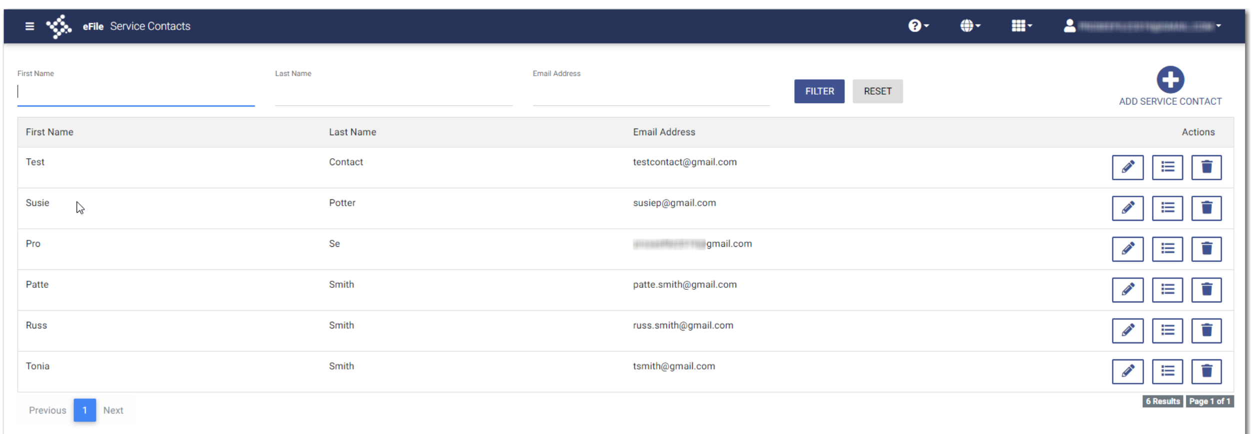



Figure 11.16 – Service Contacts Page

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

   The additional fields for the specified service contact are displayed with the information that you previously entered.
3. Update the information, as applicable.
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.

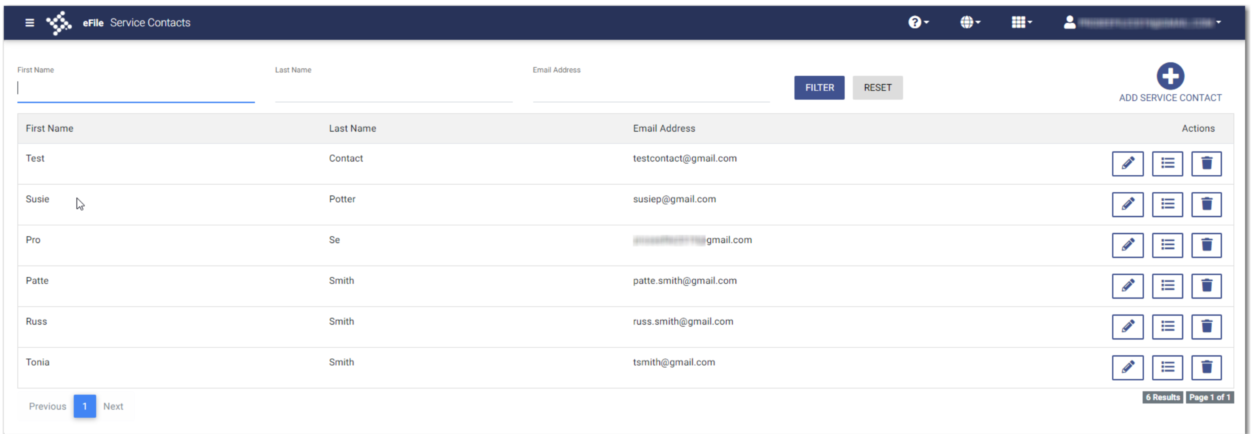



**Figure 11.17 – Service Contacts Page**

2. Locate the name of the service contact for whom you want to view the attached cases, and then click  .

   If there are cases attached to the specified service contact, the list of cases is displayed in a window.

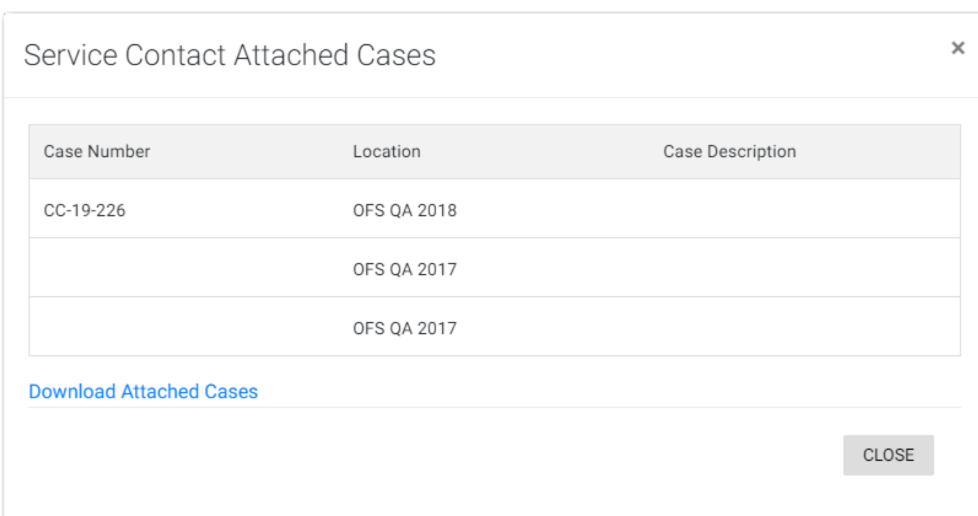



**Figure 11.18 – Service Contact Attached Cases Window**

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

The attached cases are listed on the Excel spreadsheet.

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

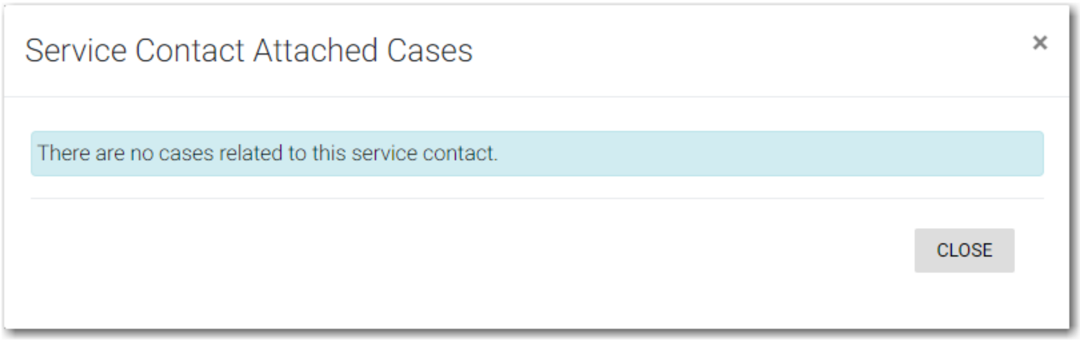



**Figure 11.19 – Service Contact Attached Cases Window – No Attached Cases**

# Updating Information for a Case Service Contact

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

To update the information for a case service contact:

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

   The *Filing History* page is displayed.

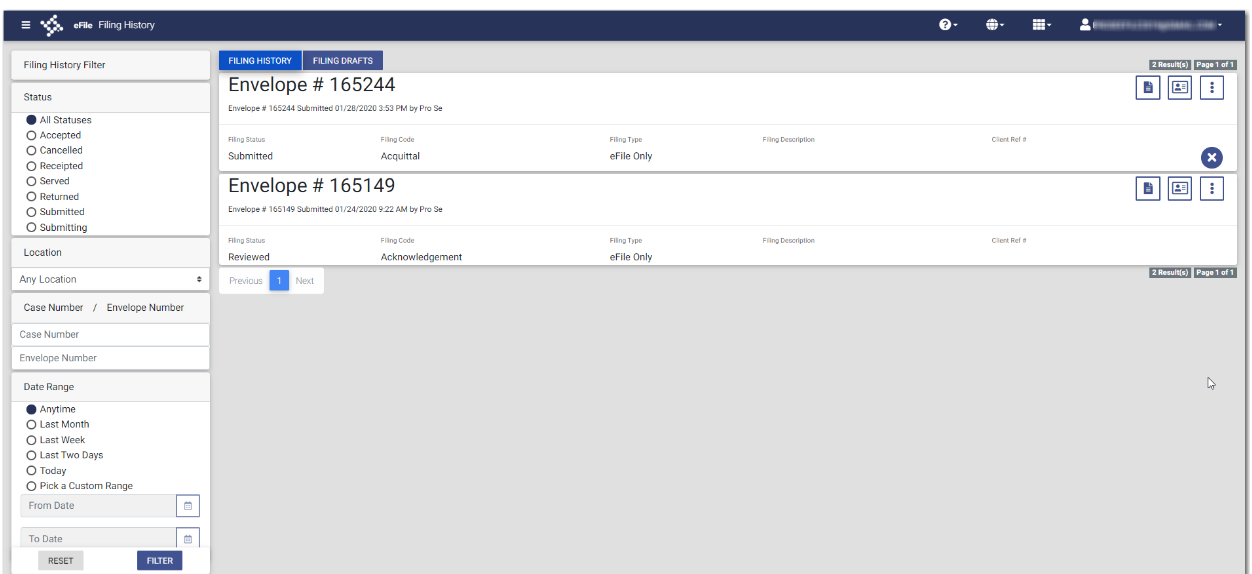



**Figure 11.20 – Filing History Page**

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

3. Click .

   The service contacts for the case are displayed.

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

   The *Update Service Contact* window is displayed.

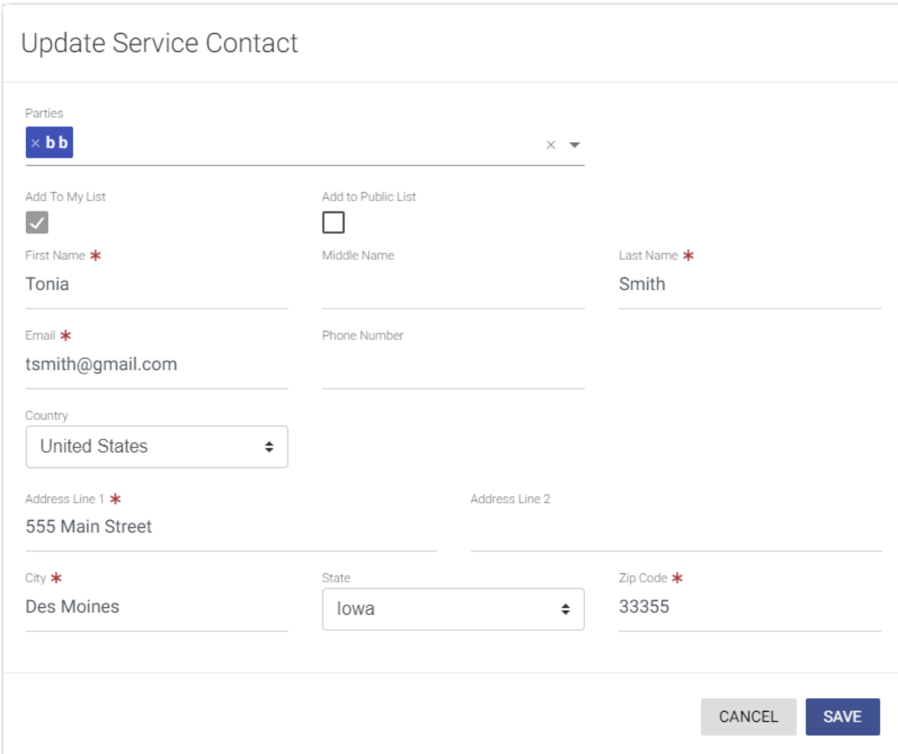



**Figure 11.21 – Update Service Contact Window**

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

# Deleting a Service Contact

You can delete a contact from your service contacts list if you no longer need that contact.

To delete a service contact from the *Service Contacts* page:

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

   The *Service Contacts* page is displayed.

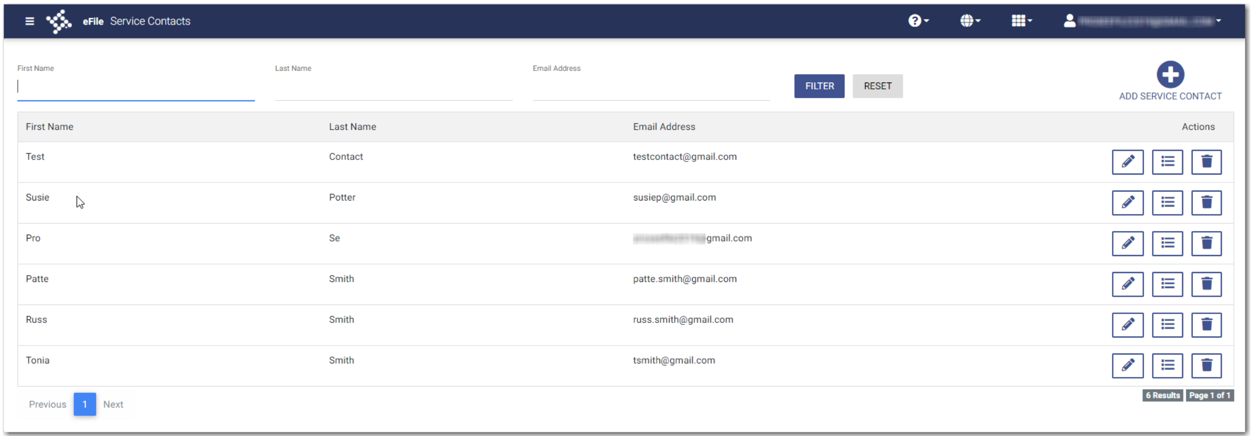



**Figure 11.22 – Service Contacts Page**

2. Locate the name of the service contact that you want to delete.

3. Click  to immediately delete the service contact, or click  to first view the cases that are attached to that service contact.

   **Note: Once deleted, the contact is immediately removed from the service contacts list and from any case filings to which it was attached.**

# 12 Templates

**Topics covered in this chapter**



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

## Adding a Template

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

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

   The *Templates* page is displayed.

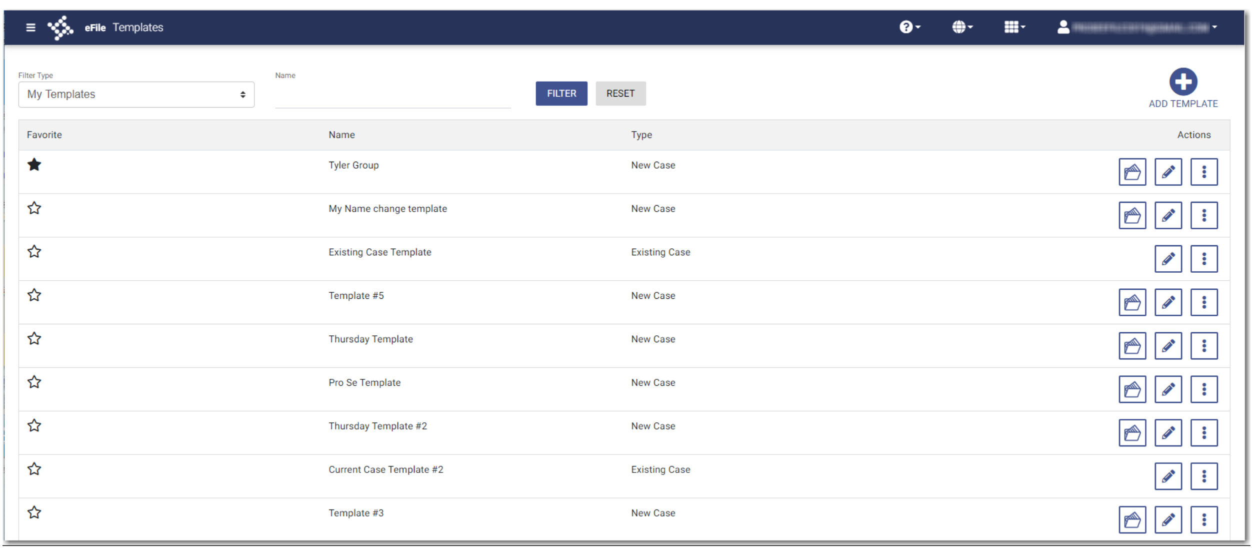



**Figure 12.1 – Templates Page**

2. Click .

   A pane is displayed.

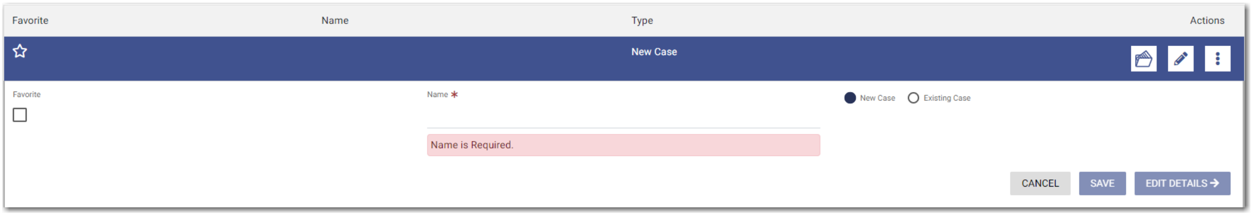



**Figure 12.2 – Templates Pane**

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

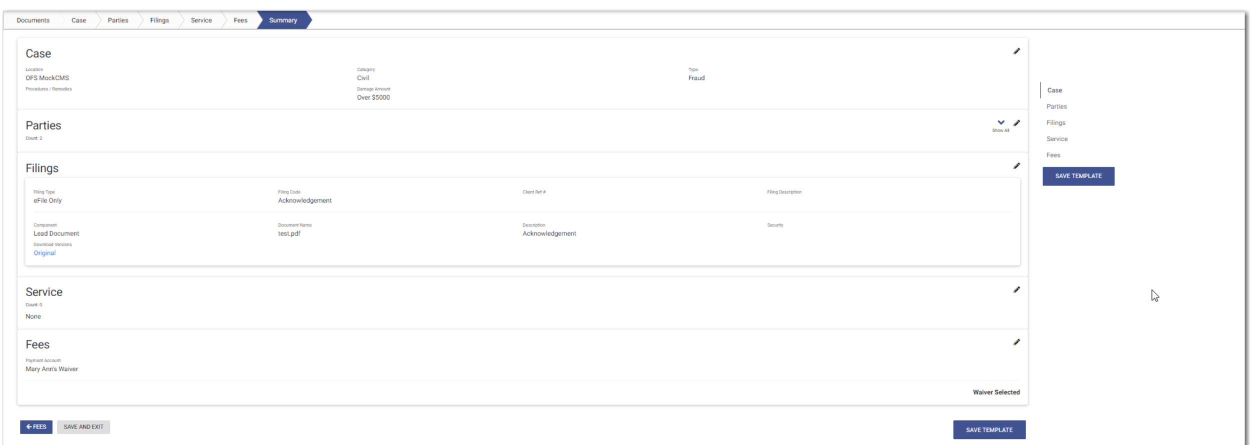



**Figure 12.3 – Sample Summary Page**

The *Templates* page is displayed. The template you just created is added to the list of other templates. The new template is also displayed on the *Dashboard* page.

# Editing a Template

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

To edit an existing template:

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

   The *Templates* page is displayed.

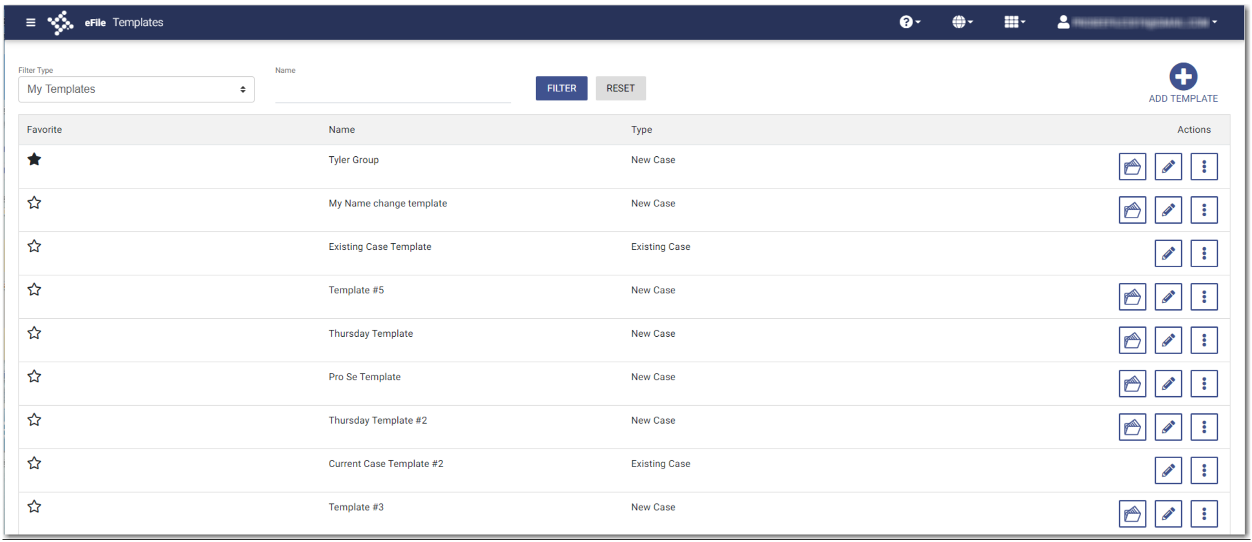
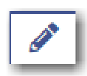



**Figure 12.4 – Templates Page**

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.**

3. Click EDIT DETAILS →.

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

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

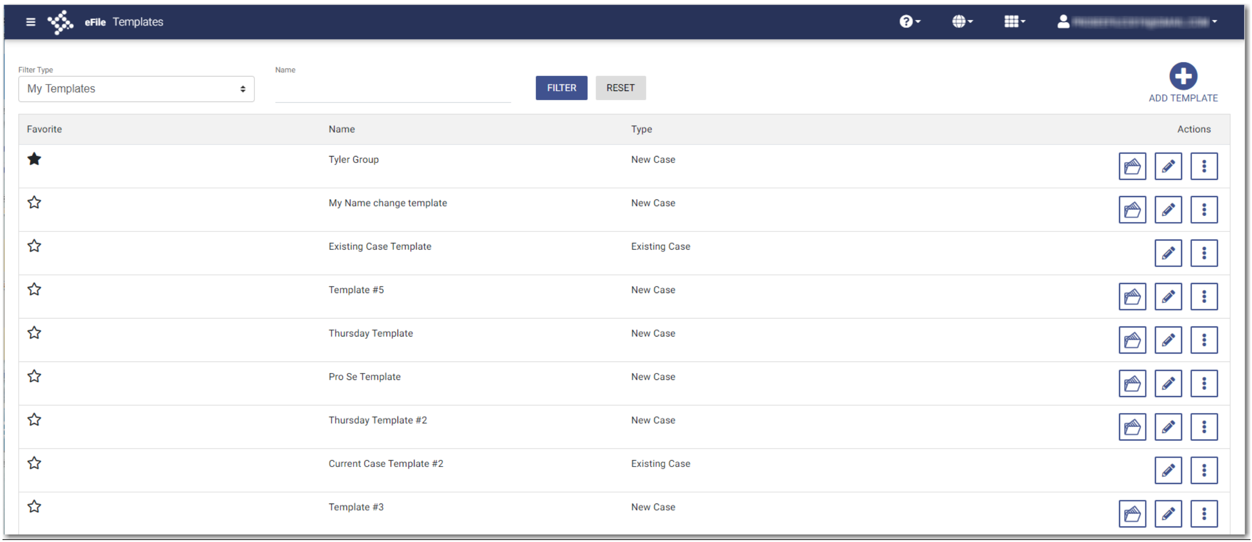



**Figure 12.5 – Templates Page**

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

   The *Case Information* page is displayed. All of the information that you entered when you created the template is auto-filled.
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.

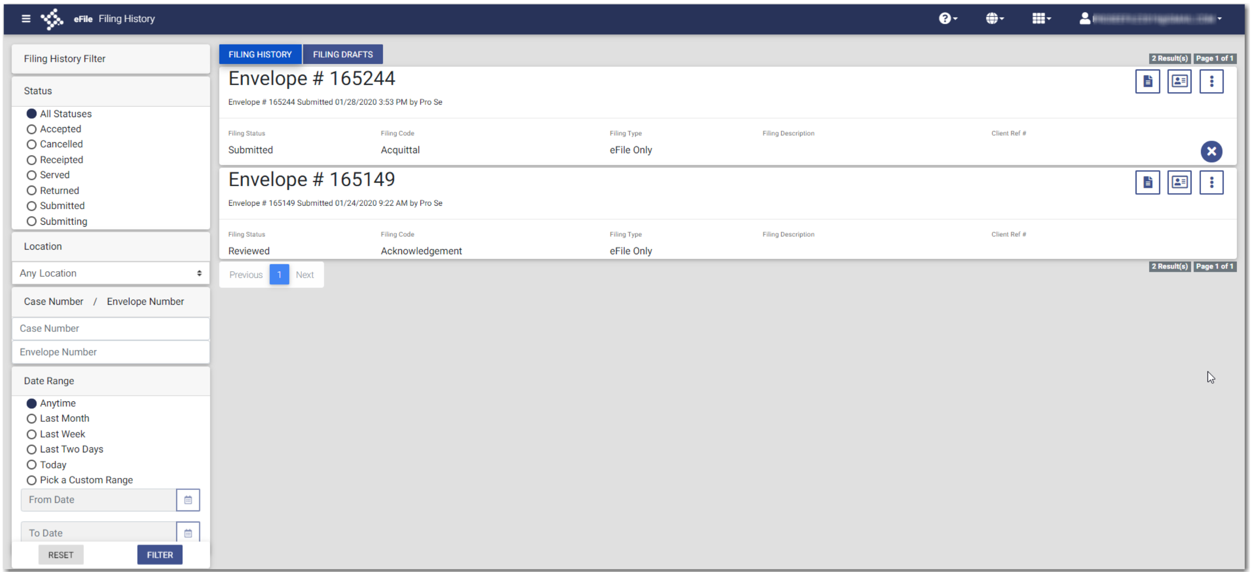



**Figure 12.6 – Filing History Page**

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

   A drop-down list is displayed.

3. Click **File Into Case With Template**.

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

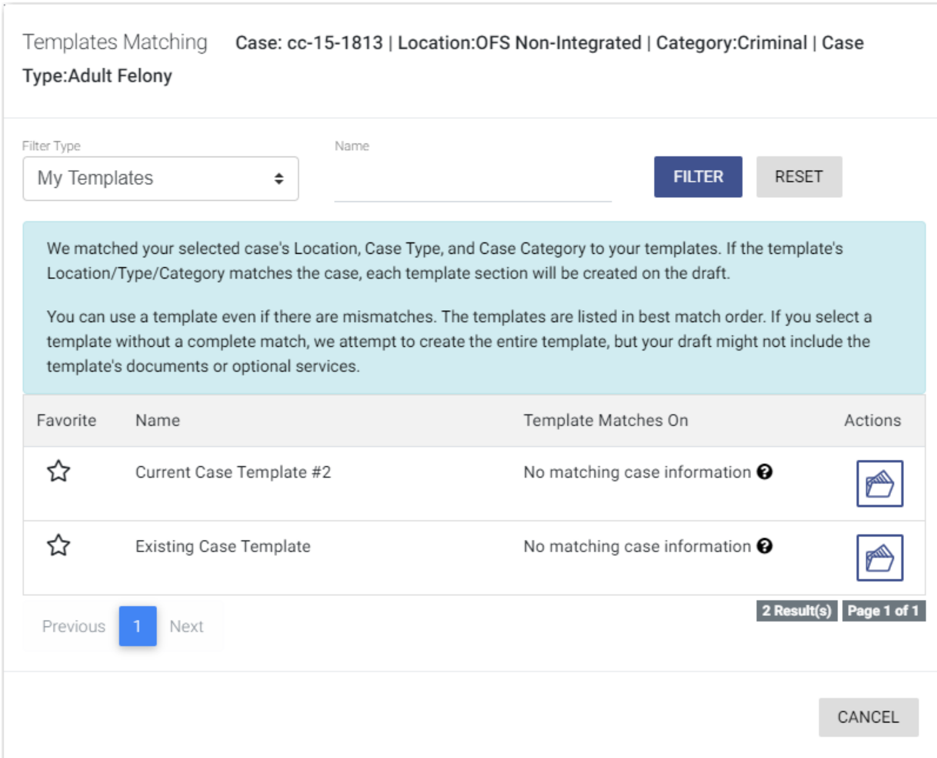



**Figure 12.7 – Templates Matching Window**

4. Locate the template that you want to use for the case you are filing into, and then click .

   The template that you selected is displayed on the *Upload Documents* page. The fields that you previously entered when the template was created are auto-filled.

5. Enter the remaining required information for the new case until you reach the *Summary* page.

6. Review the summary of the case filing. After you are satisfied with the information in your filing, click **SUBMIT**.

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

# Copying a Template

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

To copy an existing template:

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

   The *Templates* page is displayed.

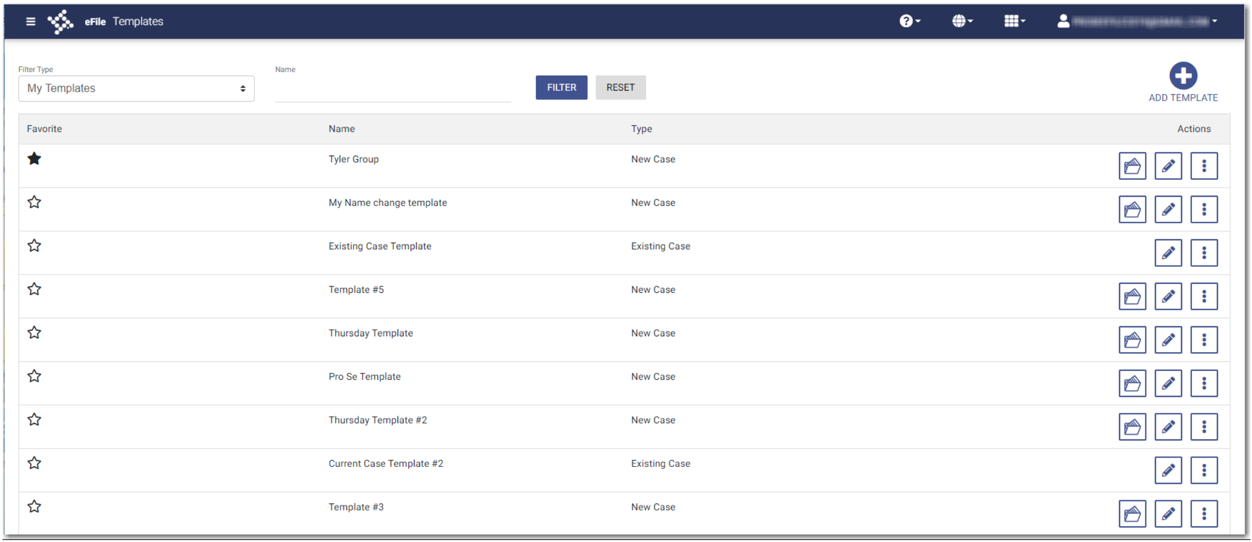
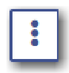


Figure 12.8 – Templates Page

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

   A drop-down list is displayed.

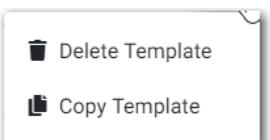


Figure 12.9 – More Options Drop-Down List

3. Click **Copy Template**.

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

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

 to make changes to the template.

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

# Deleting a Template

You can delete a template that you no longer need.

To delete an existing template:

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

   The *Templates* page is displayed.

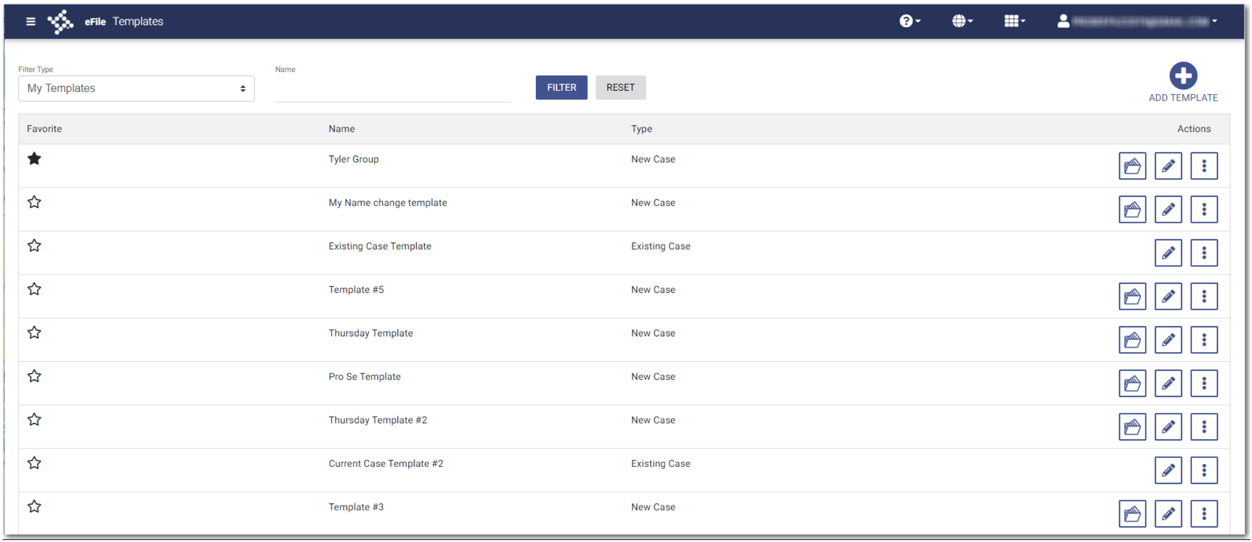



Figure 12.10 – Templates Page

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

   A drop-down list is displayed.

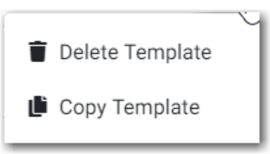
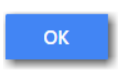
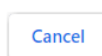



Figure 12.11 – More Options Drop-Down List

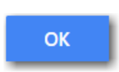
3. Click **Delete Template**.

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

4. Click 

to delete the template, or click 

to cancel the action.

   If you clicked 

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

# 13 Filings

**Topics covered in this chapter**



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

## Copying the Envelope

You can copy an envelope to create a new envelope to resubmit to the courts if the envelope has been returned or rejected for any reason.

To copy an envelope:

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

   The *Filing History* page is displayed.

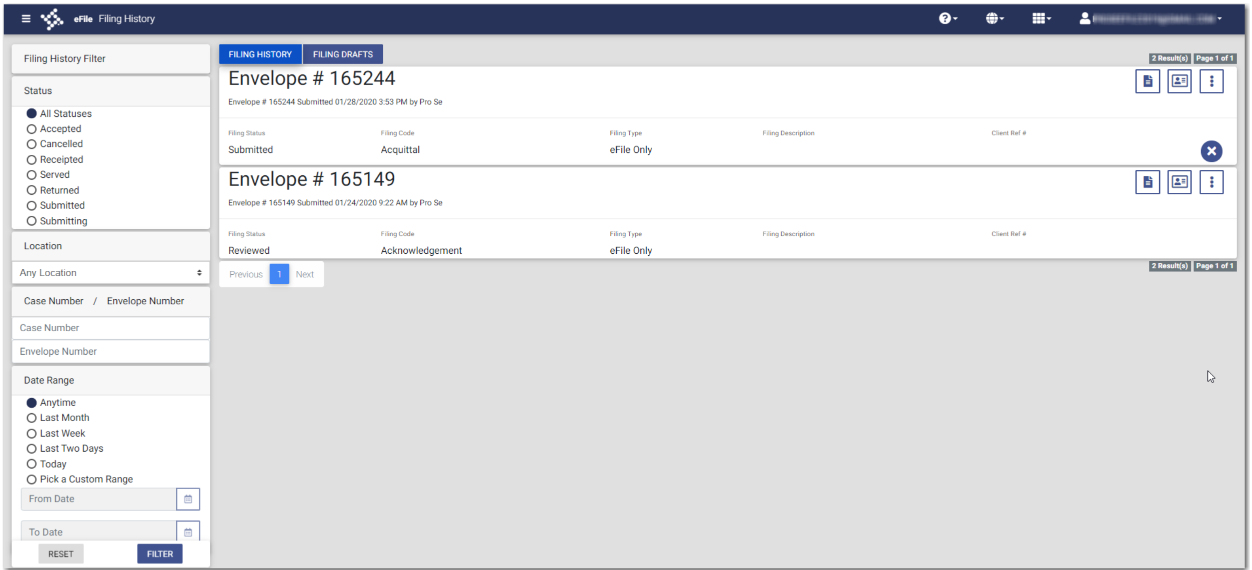
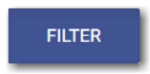



Figure 13.1 – Filing History Page

2. In the Status pane, select **Returned**, and then click 

.

   The returned cases are displayed, per the filter that you set.

3. Locate the envelope that you want to copy.

4. Click , and then select **Copy Envelope**.

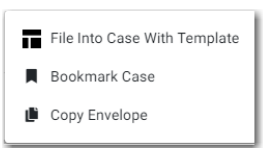



Figure 13.2 – More Options Drop-Down List

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

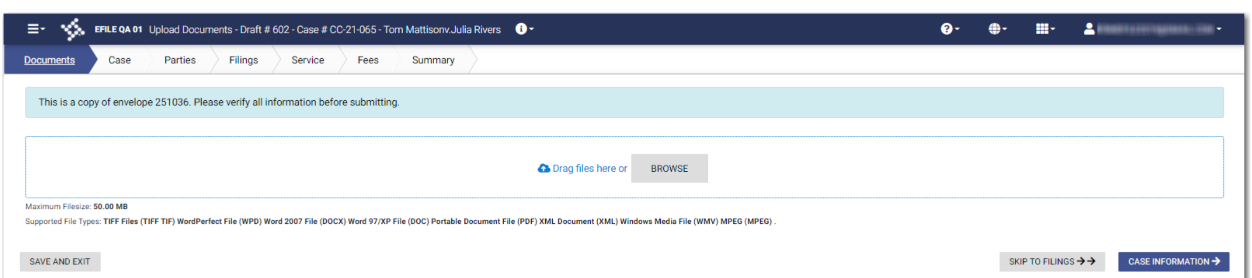



Figure 13.3 – Sample Upload Documents Page for a Copied Envelope

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

6. After you have verified the envelope, click SUBMIT.

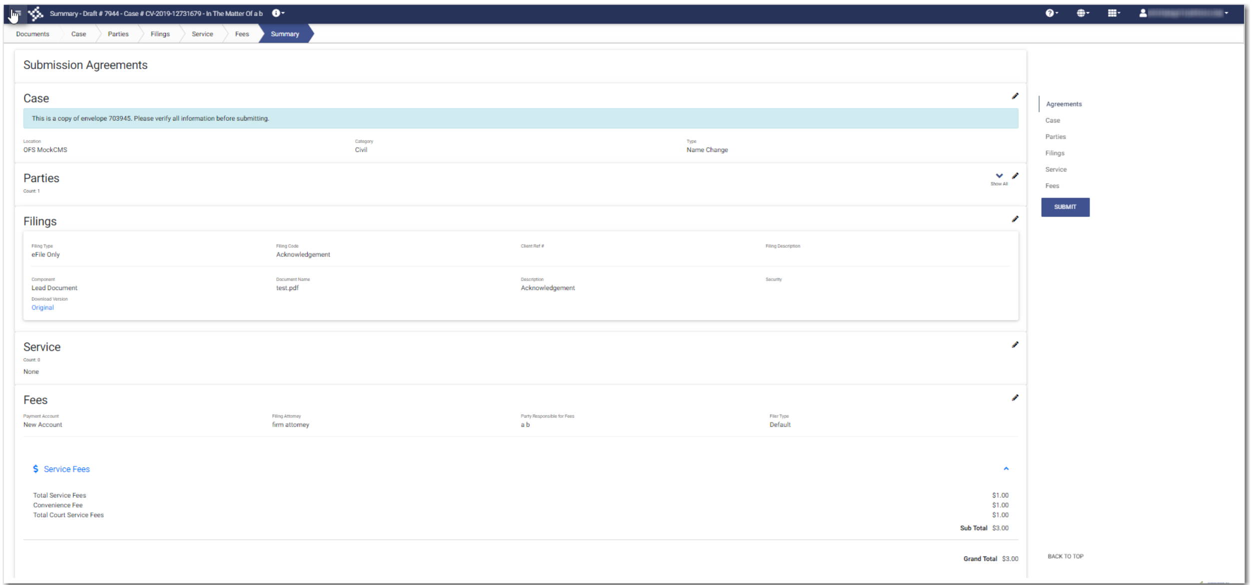



**Figure 13.4 – Sample Summary Page for a Copied Envelope**

# Viewing the Envelope Details

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

To view the envelope details:

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

   The *Filing History* page is displayed.

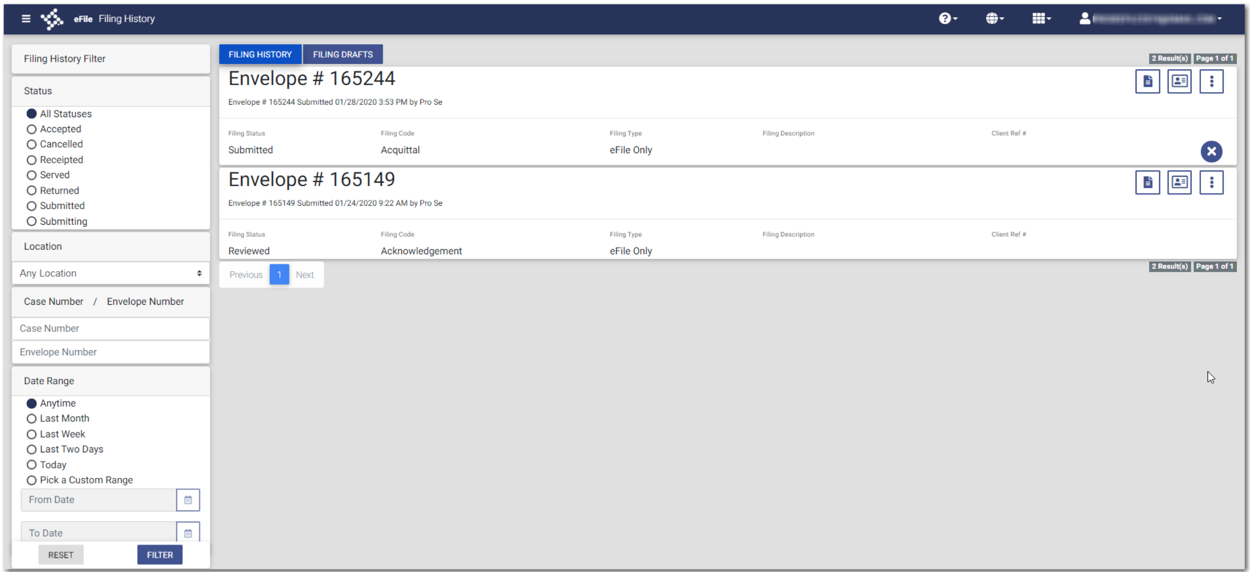



**Figure 13.5 – Filing History Page**

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

3. Click .

   The envelope details are displayed.

   **Note: For subsequent filings, the envelope details do NOT include newly-added parties if the envelope has not been accepted yet.**

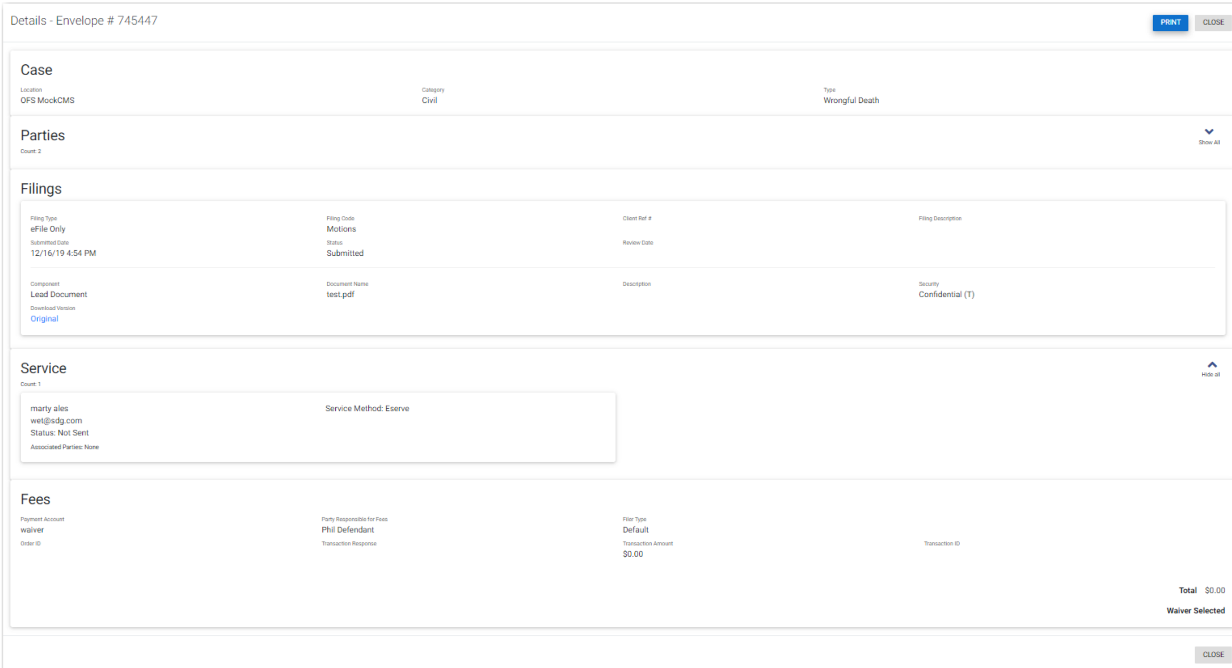



**Figure 13.6 – Sample Envelope Details Page**

4. Click 

to print a copy of the envelope details.

# Viewing Case Address Information in the Envelope Details

You can view the case address information and other details of an envelope on the *Filing History* page.

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

To view the case address information in the envelope details:

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

   The *Filing History* page is displayed.

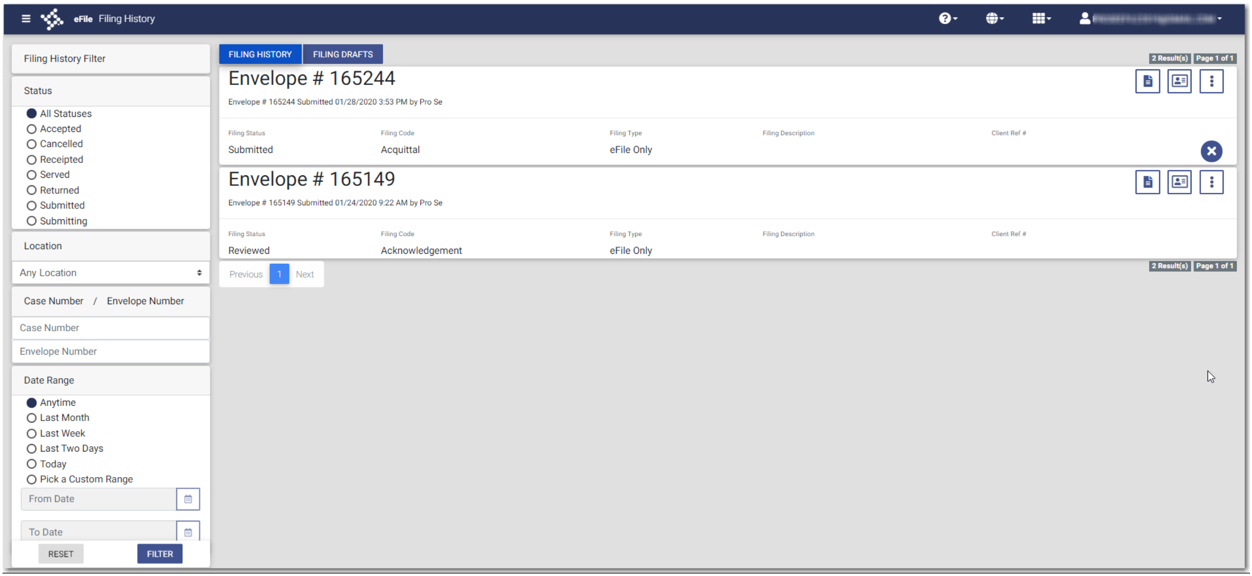



**Figure 13.7 – Filing History Page**

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

   The envelope details are displayed.

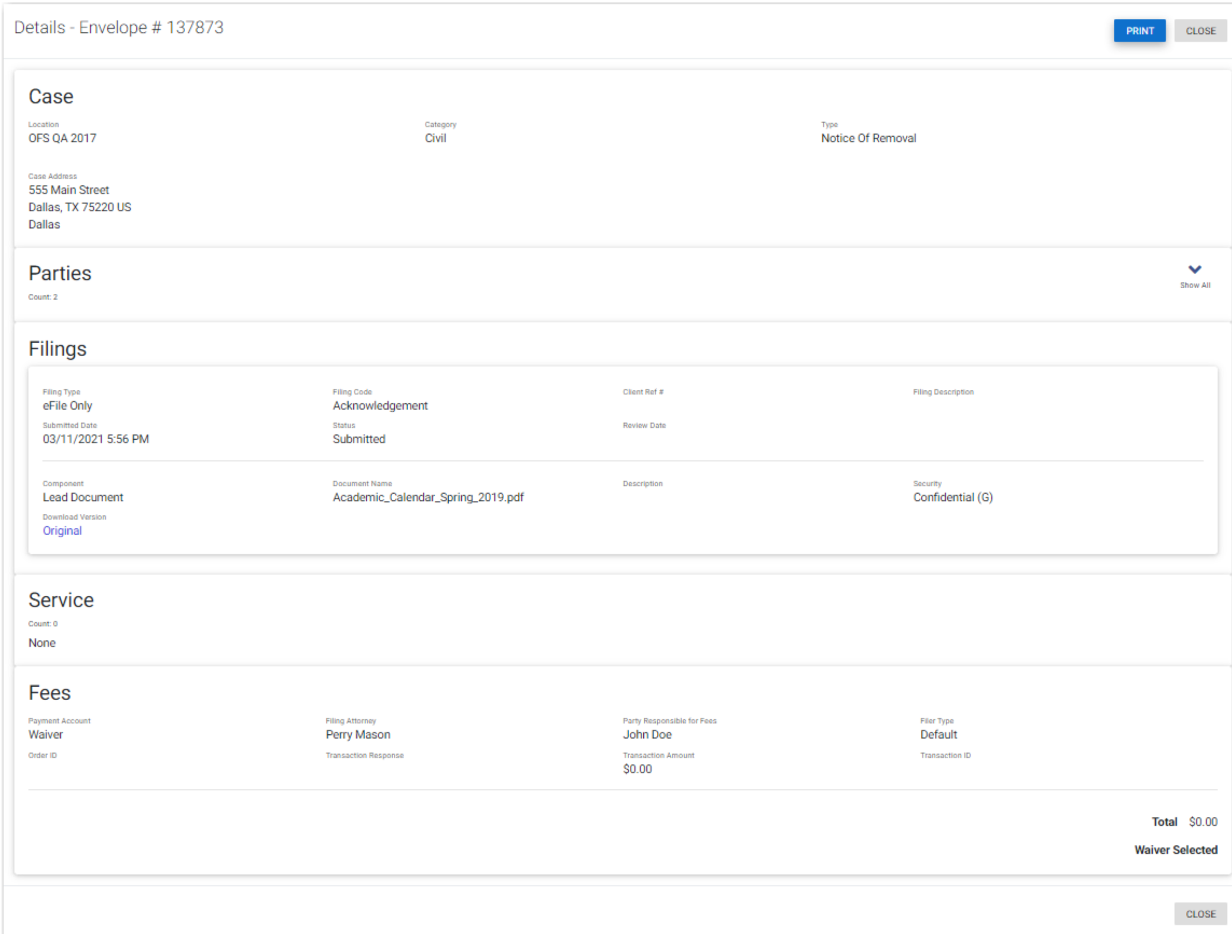



**Figure 13.8 – Case Address Information on the Envelope Details Page**

4. Click 

to print a copy of the envelope details.

# Viewing Mail Service Fees in the Envelope Details

You can view the mail service fees in the envelope details.

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

To view the mail service fees in the envelope details:

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

   The *Filing History* page is displayed.

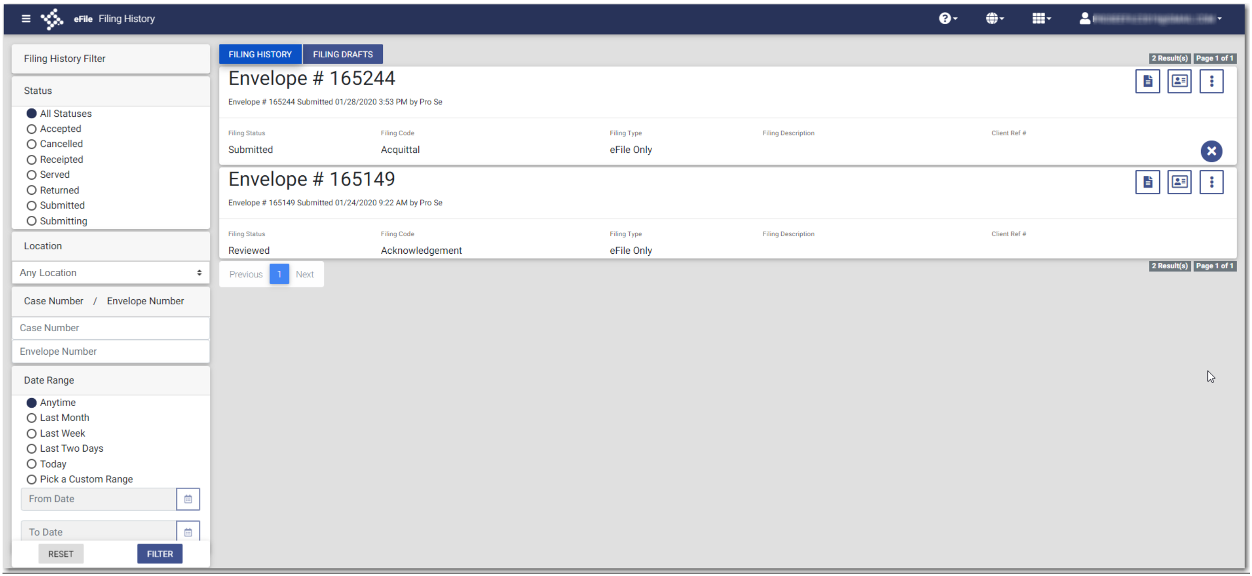



**Figure 13.9 – Filing History Page**

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

3. Click .

   The mail service fees are displayed in the envelope details.

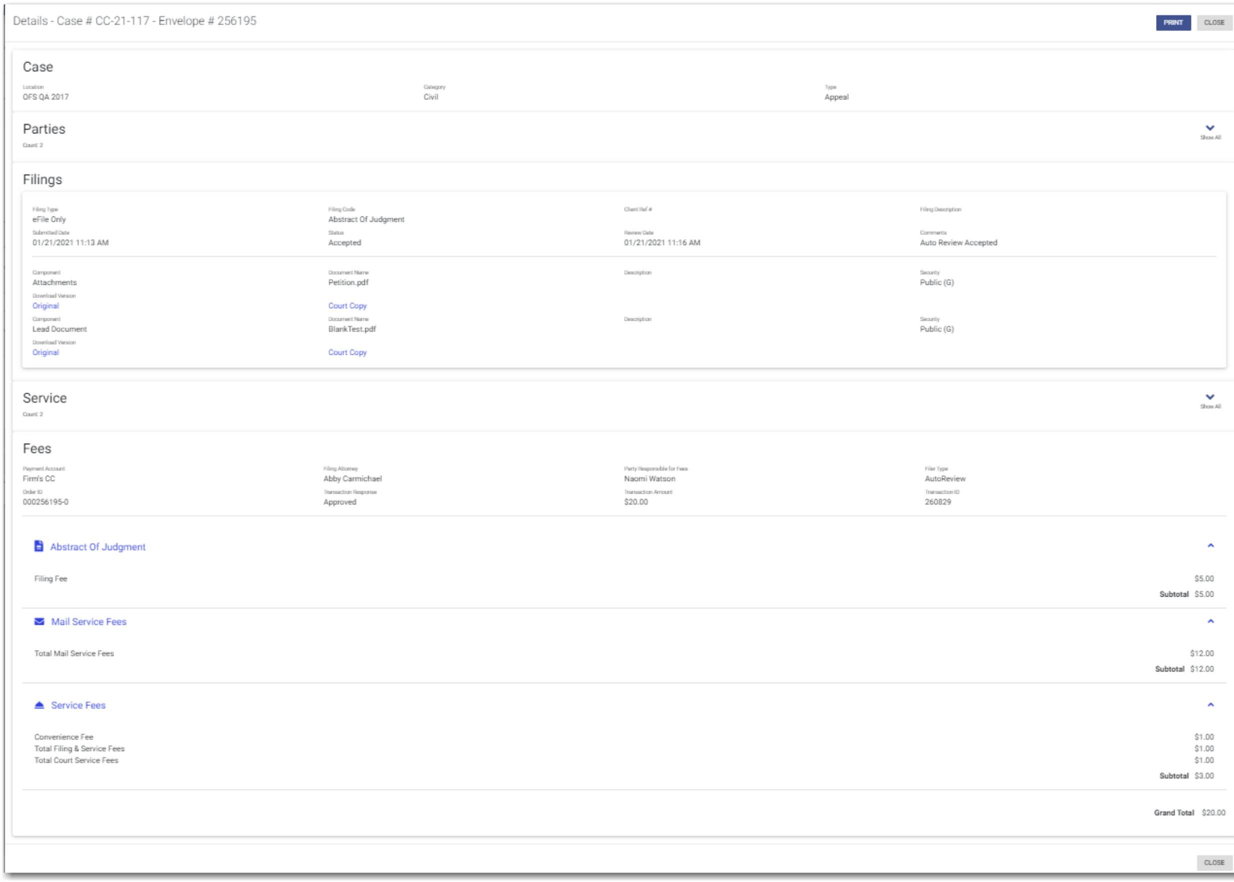



**Figure 13.10 – Sample Envelope Details Page with the Mail Service Fees Displayed**

4. Click **PRINT** 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.

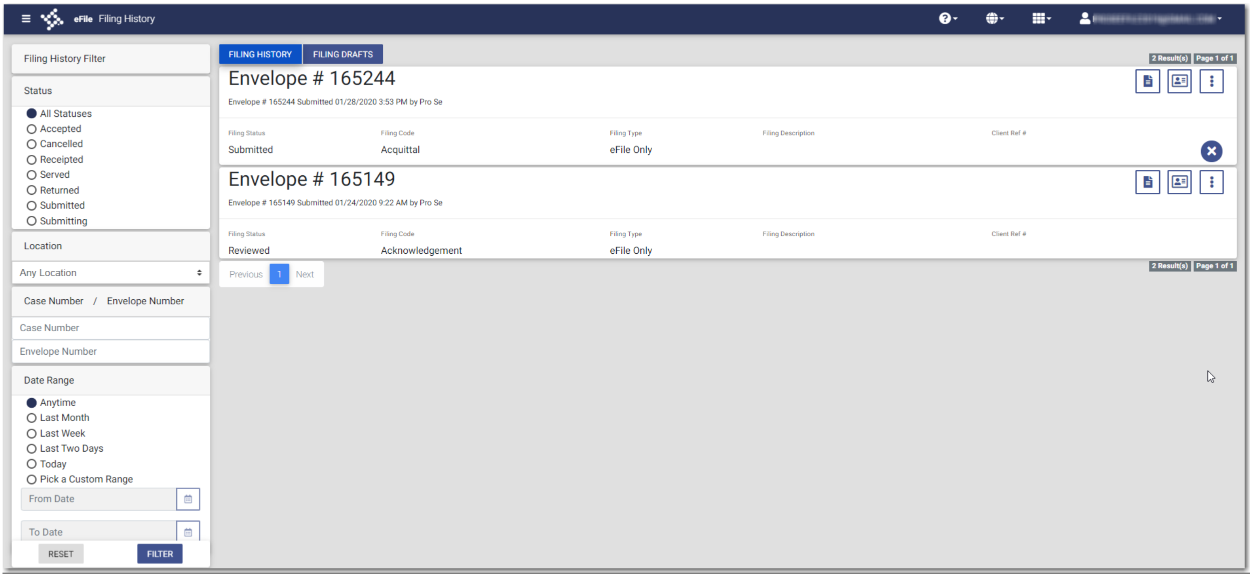



**Figure 13.11 – Filing History Page**

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

3. Click .

   The envelope details are displayed.

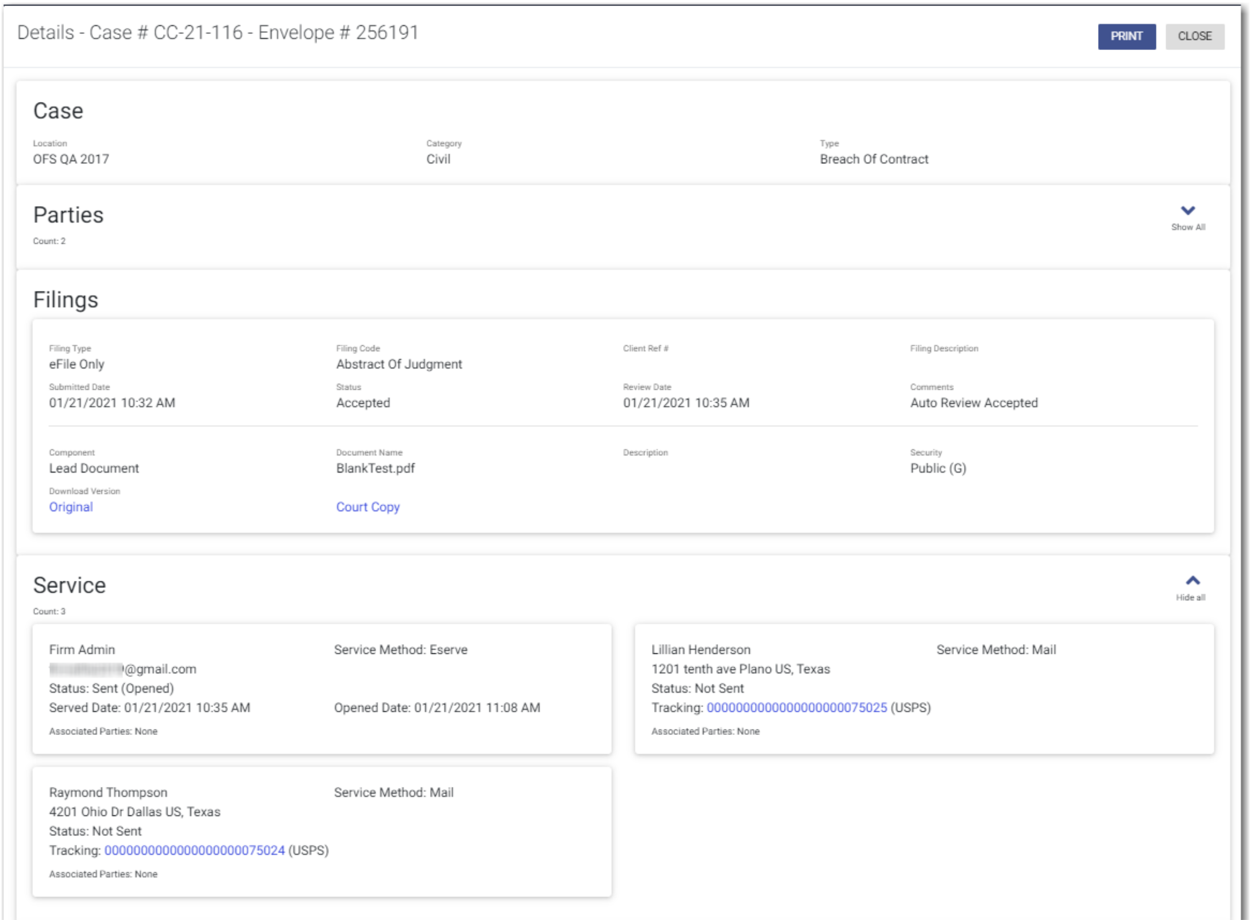



**Figure 13.12 – Sample Envelope Details Page**

In the Service pane, you can view the information related to the certified mail for a specified filing.

4. Click the link in the tracking section to track the status of the certified mail.

   **Note: Clicking the link accesses the United States Postal Service (USPS) website, which is displayed in a new tab in your browser.**

5. Follow the instructions on the USPS website to track the status of the certified mail, which can include obtaining an image with proof of delivery.

# Resuming a Case Filing

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

To resume a case filing:

1. Locate the specified draft on the *Filing Drafts* page.

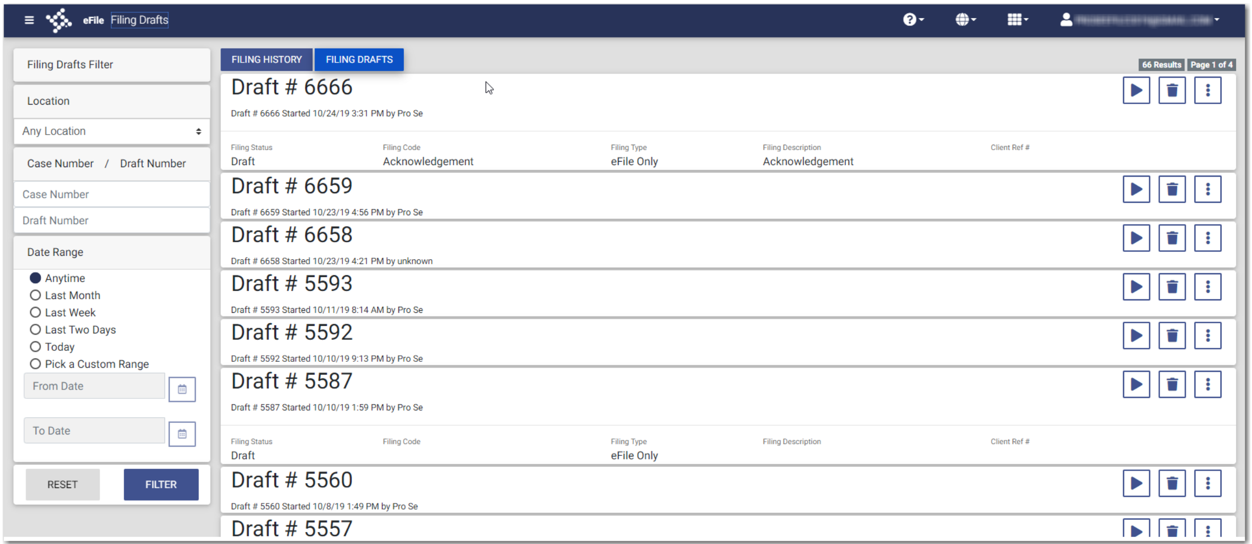
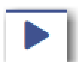



**Figure 13.13 – Filing Drafts Page**

2. Click .

   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 **SUBMIT**.

# Deleting a Draft Filing

You can delete a draft filing that you no longer need.

To delete a draft filing:

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

   The *Filing Drafts* page is displayed.

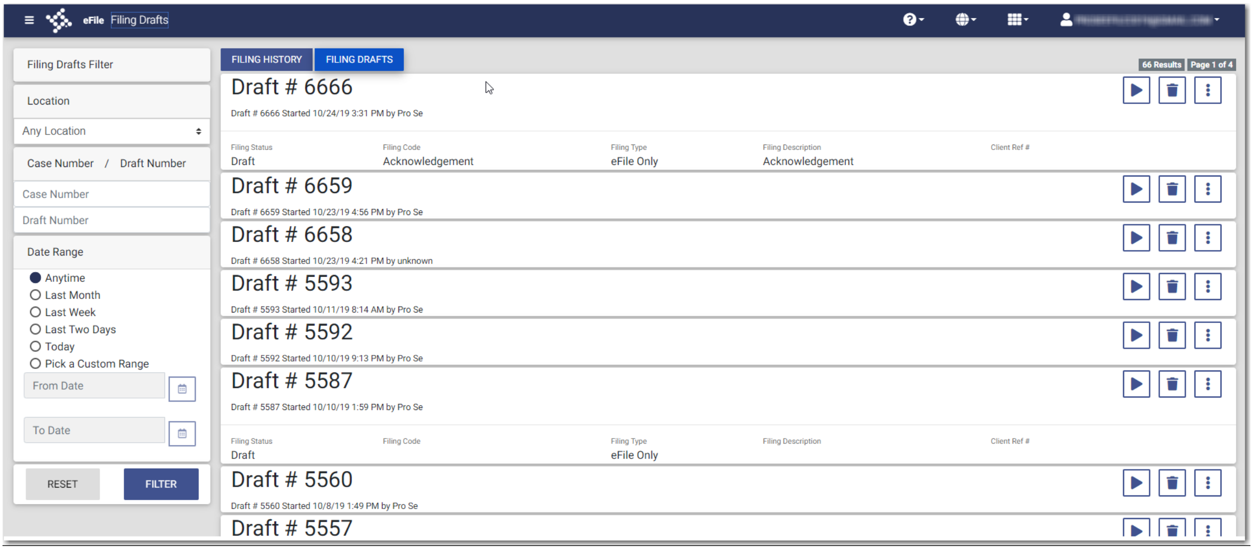



**Figure 13.14 – Filing Drafts Page**

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

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

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

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

# Canceling a Filing

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

To cancel a filing:

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

   The *Filing History* page is displayed.

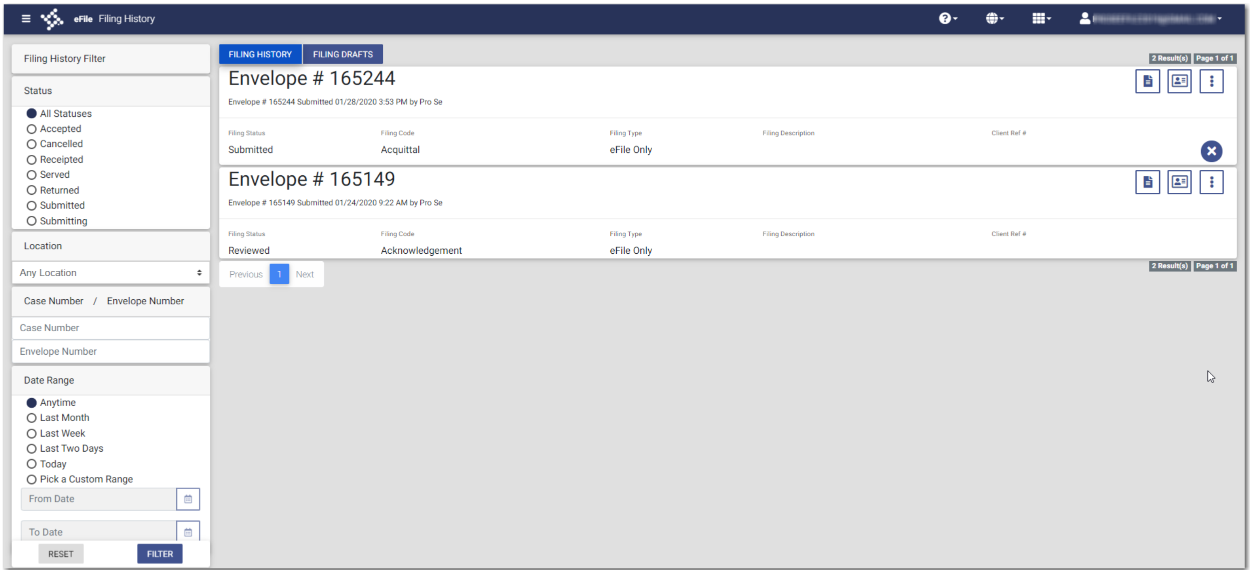



**Figure 13.15 – Filing History Page**

2. Locate the filing that you want to cancel.

   **Note: The filing must be in the Submitting or Submitted state to be canceled.**

3. Click .

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

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

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

# 14 Bookmarks

**Topics covered in this chapter**



The *Bookmarks* page displays a list of case numbers, locations, and descriptions for the cases that you have bookmarked. Only you can see this information. Neither the public nor any user can see your case list.

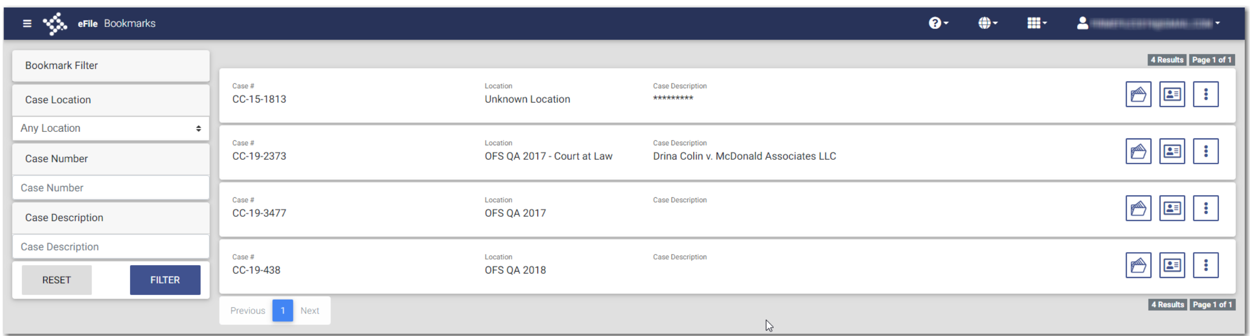



**Figure 14.1 – Sample Bookmarks Page**

## Creating a Bookmark for a Case

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

To create a bookmark for a case:

1. On the Dashboard menu, click either **Filing History** or **Filing Drafts**.

   The page that you selected is displayed.

2. Locate the case or the draft filing that you want to bookmark, and then click .

   A drop-down list is displayed.

3. Select **Bookmark Case**.

   The case or draft filing that you bookmarked will now be displayed on the *Bookmarks* page.

## Removing a Bookmark from a Case

You can remove a bookmark from a case that you previously bookmarked.

To remove an existing bookmark from a case:

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

   The *Bookmarks* page is displayed.

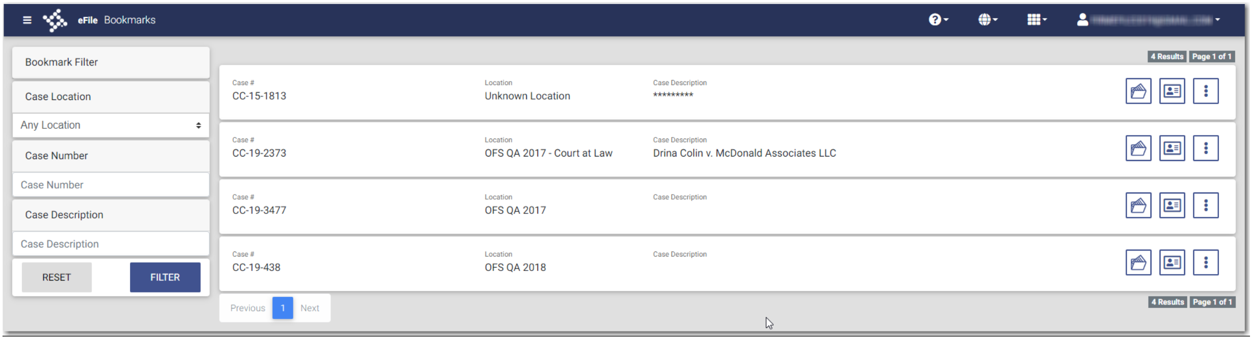



**Figure 14.2 – Sample Bookmarks Page**

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

   A drop-down list is displayed.

3. Select **Remove Bookmark**.

   The following warning message is displayed: `Are you sure you want to delete bookmark for Case # "CC-xy-abcd"?`

4. Click **OK** 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.

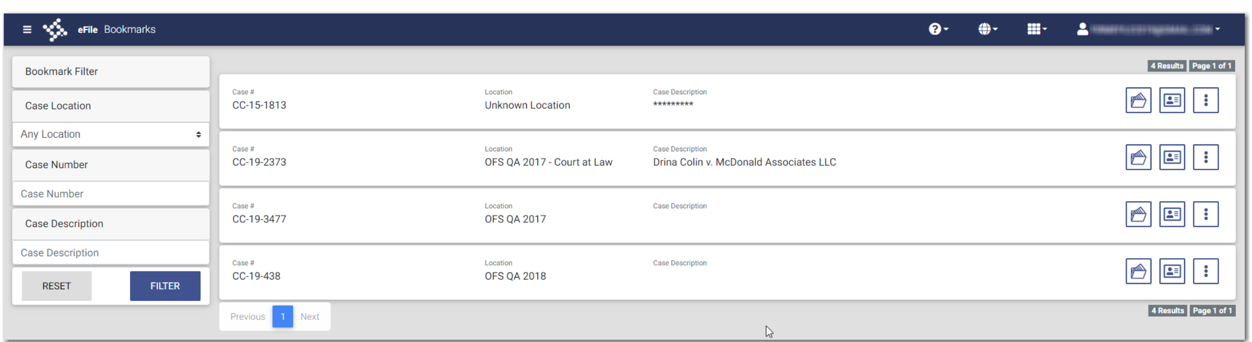



**Figure 14.3 – Sample Bookmarks Page**

2. Set the parameters for the cases that you want to view, and then click **FILTER**.

   The cases that you selected in your filter are now displayed on the *Bookmarks* page.

# 15 Bulk Filing

**Topics covered in this chapter**

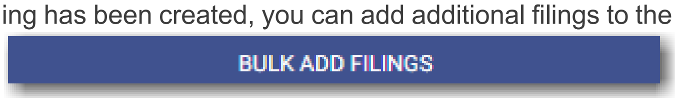
- ♦ Dashboard
- ♦ Starting Multiple New Case Filings
- ♦ Uploading Documents for a Bulk Filing
- ♦ Entering Case Information for a Bulk Filing
- ♦ Entering Party Details for a Bulk Filing
- ♦ Entering Filing Details for a Bulk Filing
- ♦ Entering Payment Information for a Bulk Filing
- ♦ Viewing the Envelope Summary for a Bulk Filing
- ♦ Associating Parties to a Bulk Filing
- ♦ Filing into Multiple Existing Cases
- ♦ Copying a Bulk Filing

Bulk filing allows you to create and submit a group of envelopes in the same group, or bulk. Some courts may provide discounts if a specified number of envelopes is submitted in the same bulk.

**Note: Bulk filing is configured by Tyler and may not be available on your system.**

Bulk 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 

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

## Dashboard

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

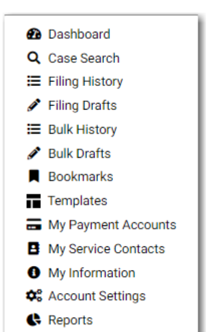



**Figure 15.1 – Dashboard**

From here, you can perform the following actions:

- Access the *Dashboard* page to start an initial or subsequent bulk filing, perform a case search, view your filing history, view your draft filings, access the cases you have bookmarked, and access the templates you have created.
- File into an existing case on the *Case Search* page. For subsequent bulk filings, you can also add cases from the *Case Search* page.
- Access the *Filing History* page to view a list of your 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.

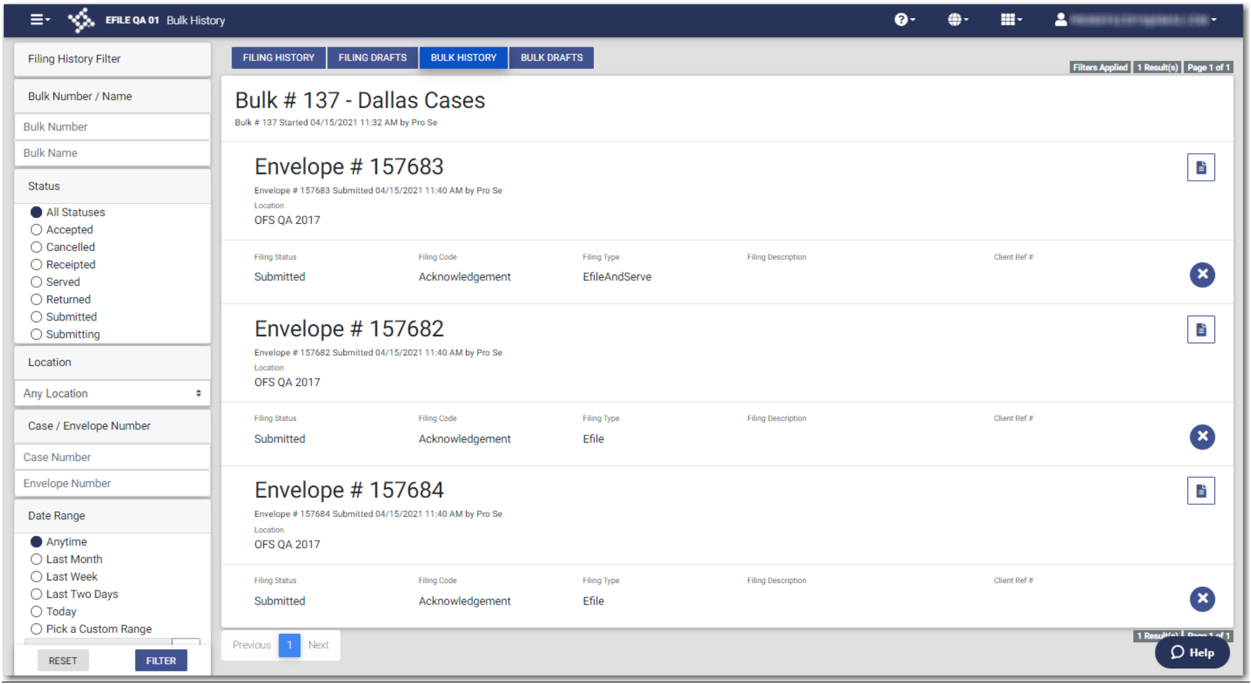



**Figure 15.2 – Bulk History Page**

# 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.

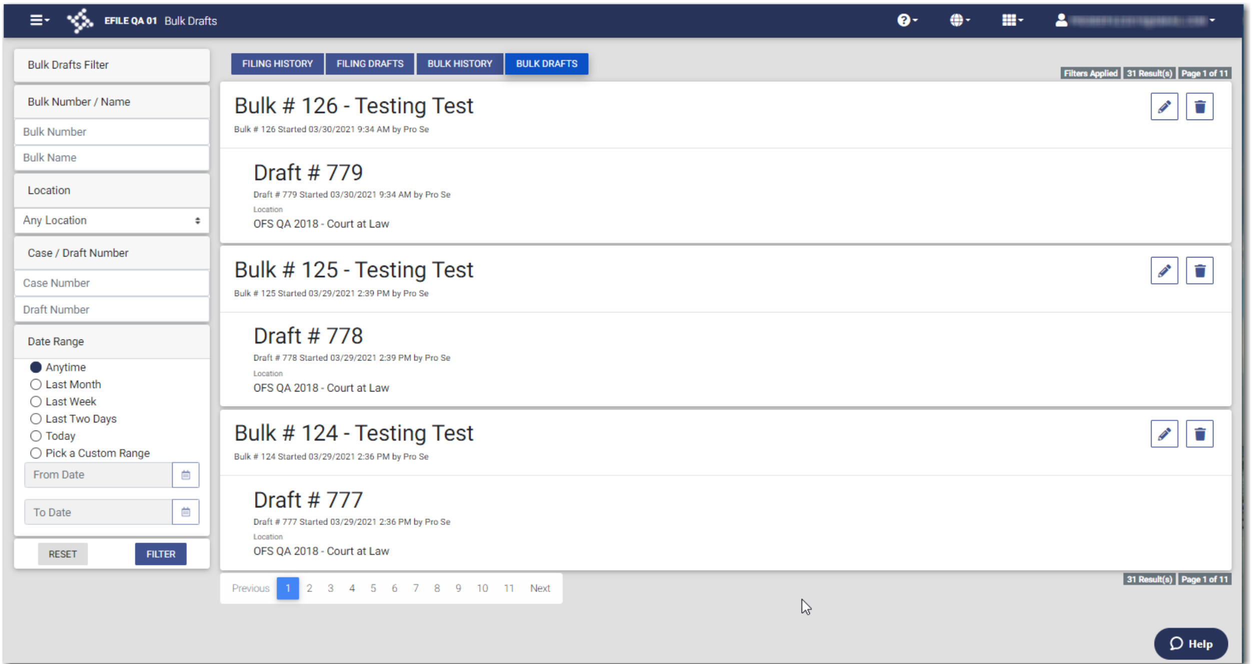


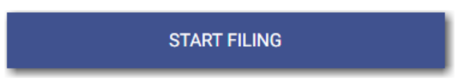

**Figure 15.3 – Bulk Drafts Page**

# Starting Multiple New Case Filings

You can create filings for multiple cases, which you can then file as one bulk filing.

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

To start multiple new case filings:

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

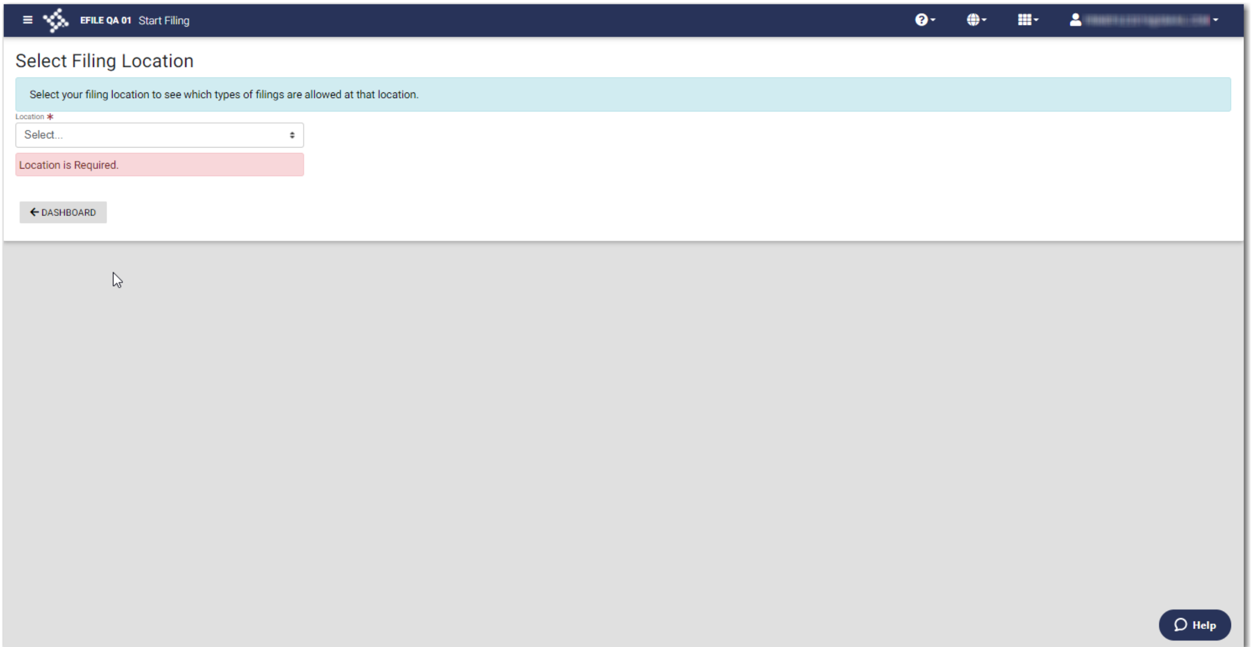



Figure 15.4 – Start Filing Page

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

   The New Case and Existing Case panes are displayed.

   **Note: If bulk filing is not supported at the location you selected, the buttons to create multiple cases are not available.**

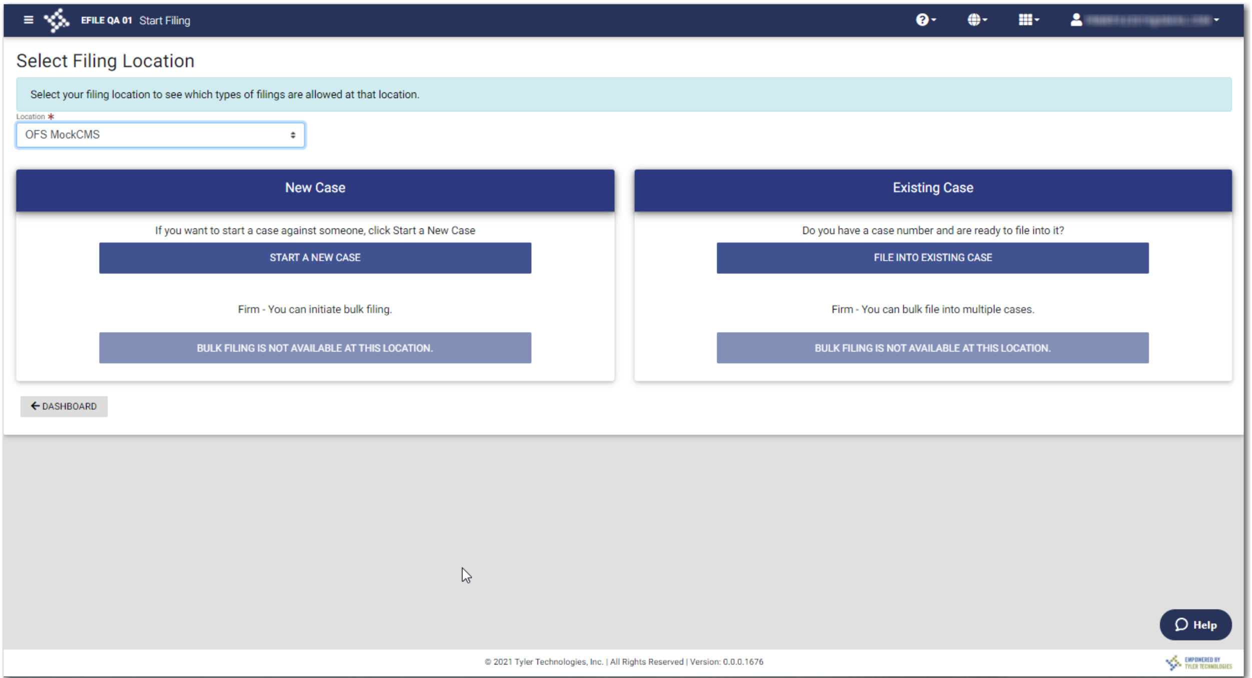



**Figure 15.5 – Start Filing Page—Bulk Filing Not Supported**

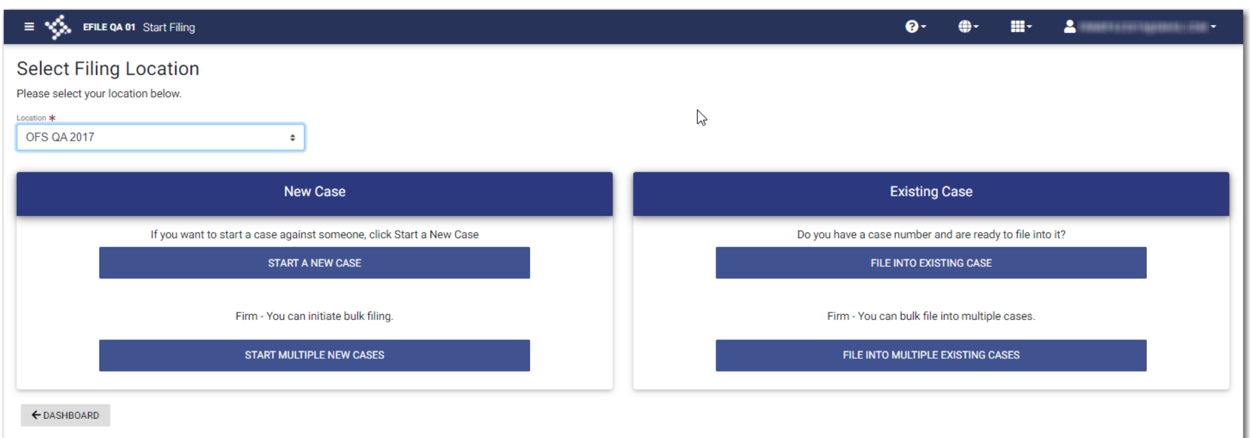



**Figure 15.6 – Start Filing Page—Bulk Filing Supported**

3. Click 

.

   The *Bulk Filing* window is displayed.

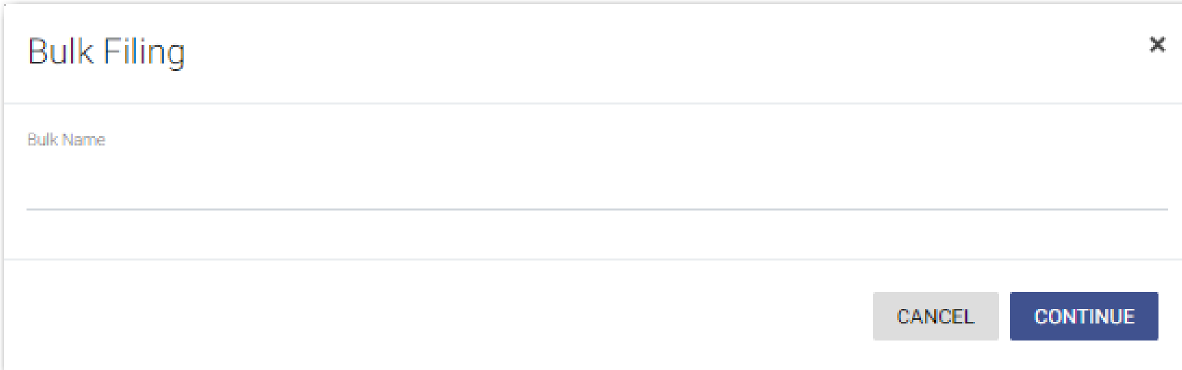



**Figure 15.7 – Bulk Filing Window**

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

   The *Bulk Filing Dashboard* page is displayed.

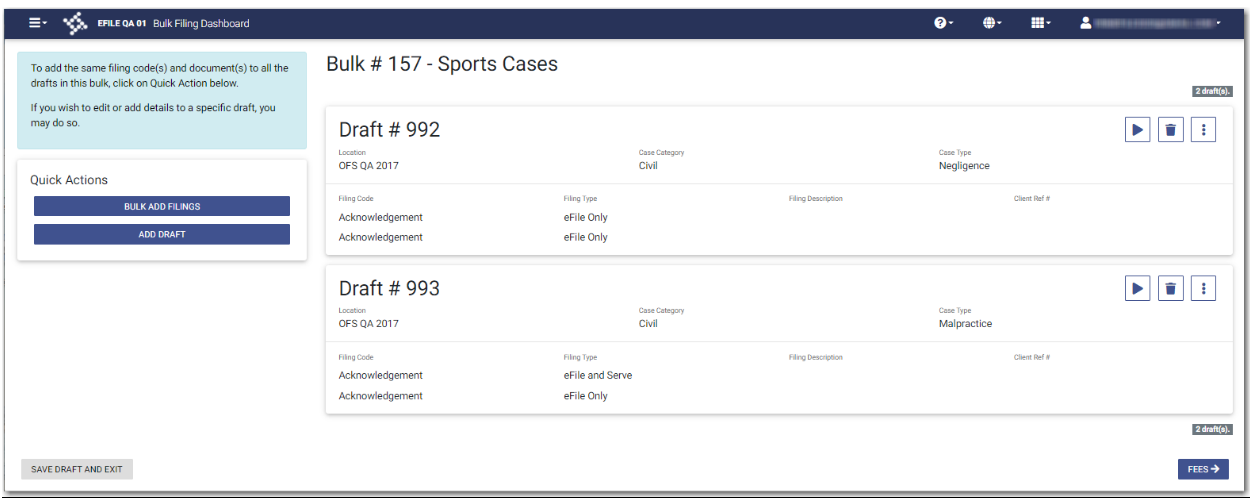



**Figure 15.8 – Sample Bulk Filing Dashboard**

**Note: If you have not completed the required fields for a filing, the following error message is displayed in the Draft pane: "Filing needs attention." If this message is displayed, you must resume your draft filing and complete the required fields.**

5. Click  .

   **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 BROWSE 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 case number or draft number.**

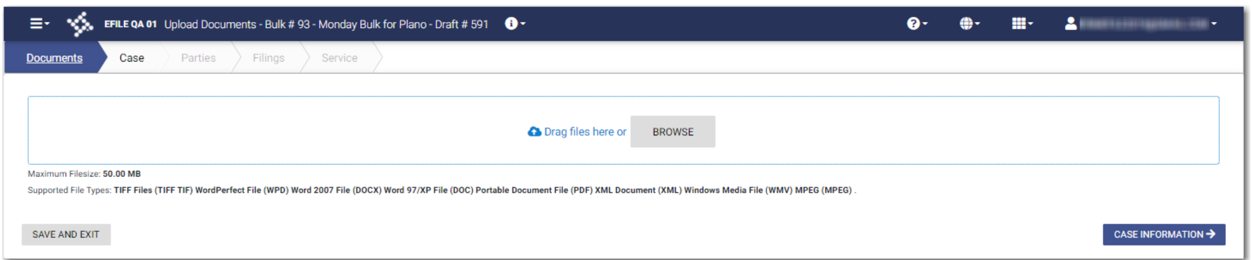



**Figure 15.9 – Upload Documents Page**

2. Select each document to be uploaded.
3. Click 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.**

# Entering Case Information for a Bulk Filing

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

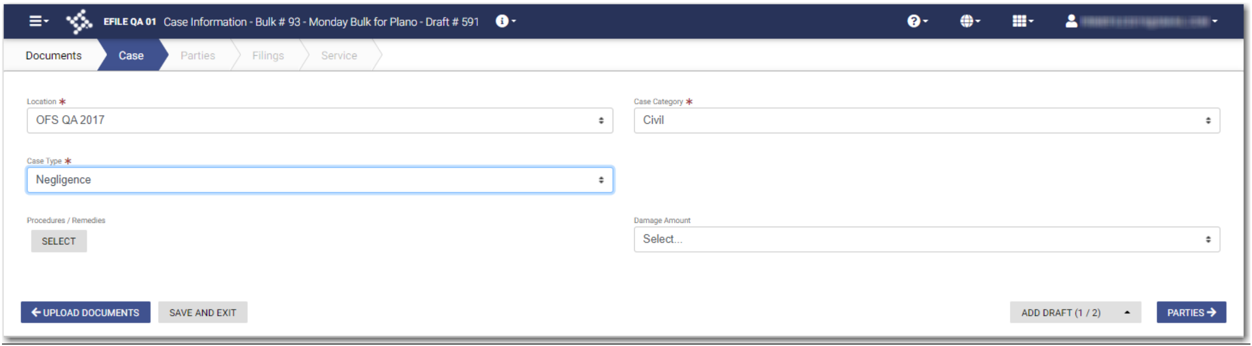



**Figure 15.10 – Sample Case Information Page**

**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 to view the case number or draft number.**

To enter case information:

1. On the *Case Information* page, select the location from the **Location** drop-down list.
2. Select the case category from the **Case Category** drop-down list.
3. Select the case type from the **Case Type** drop-down list.
4. Complete the other fields, as applicable.
5. Click PARTIES to save your work and continue, click ADD DRAFT (1 / 2) to add another draft filing, or click SAVE AND EXIT to save your work and exit the filing.

# Entering Party Details for a Bulk Filing

Each bulk filing requires a party type.

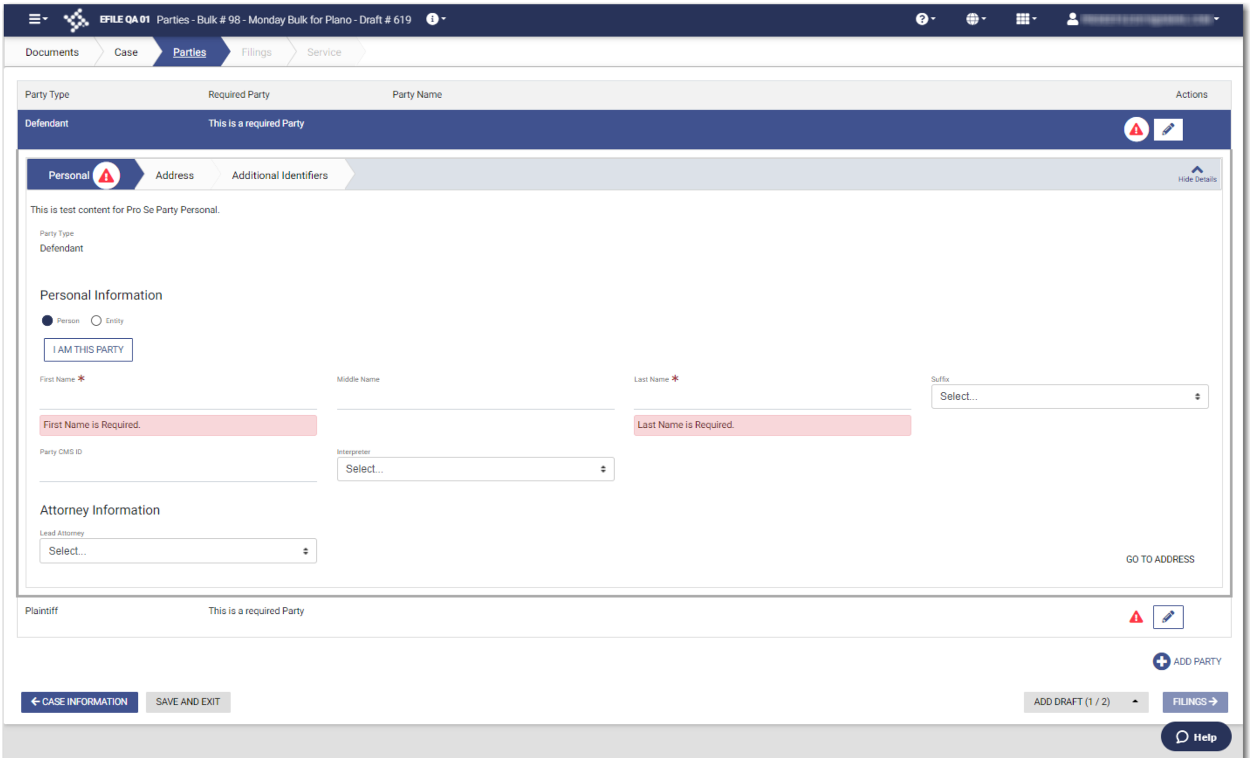



**Figure 15.11 – Example of a Parties Page in a Bulk Filing**

**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, click I AM THIS 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.
6. Click GO TO ADDRESS to enter the address information for the first party.

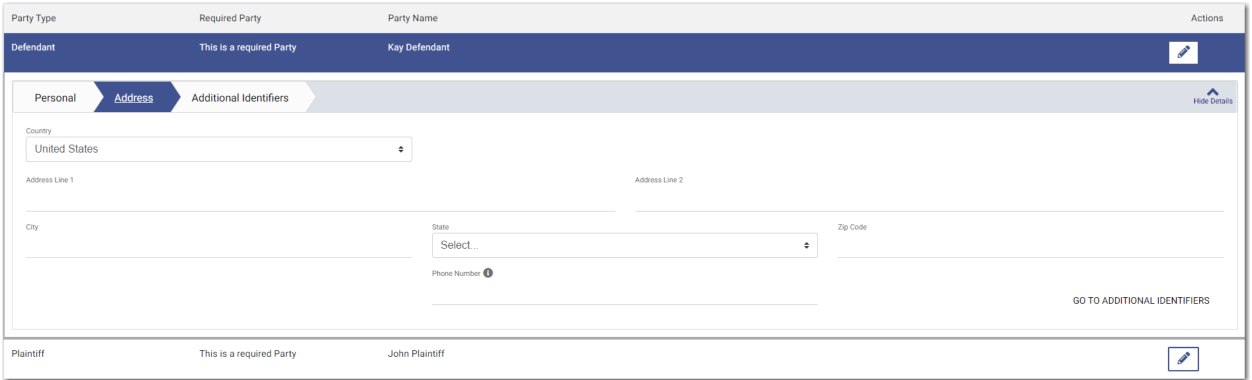



**Figure 15.12 – Address Tab on the Parties Page**

7. Enter the country, address, city, state, ZIP code, and phone number for the first party.
8. Click GO TO ADDITIONAL IDENTIFIERS to add more information for the specified party.

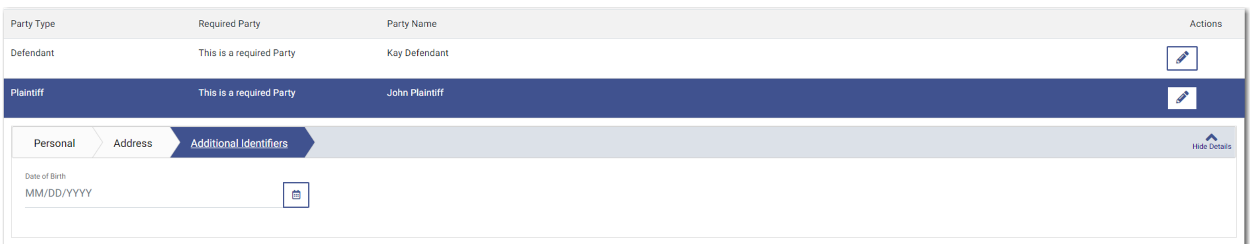



**Figure 15.13 – Additional Identifiers Tab on the Parties Page**

9. Type the party's date of birth in the **Date of Birth** field, or click [calendar] to select the date from the calendar.
10. Click [edit] to enter information for the other required party.
11. Complete all of the required fields for the second party.
12. If you have another party to add to the case, click ADD PARTY. Continue to add parties until all parties have been added to the case.
13. Click ADD DRAFT (1 / 2) to add another filing to the bulk, or click FILINGS to save your work and to continue.

# Entering Filing Details for a Bulk Filing

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

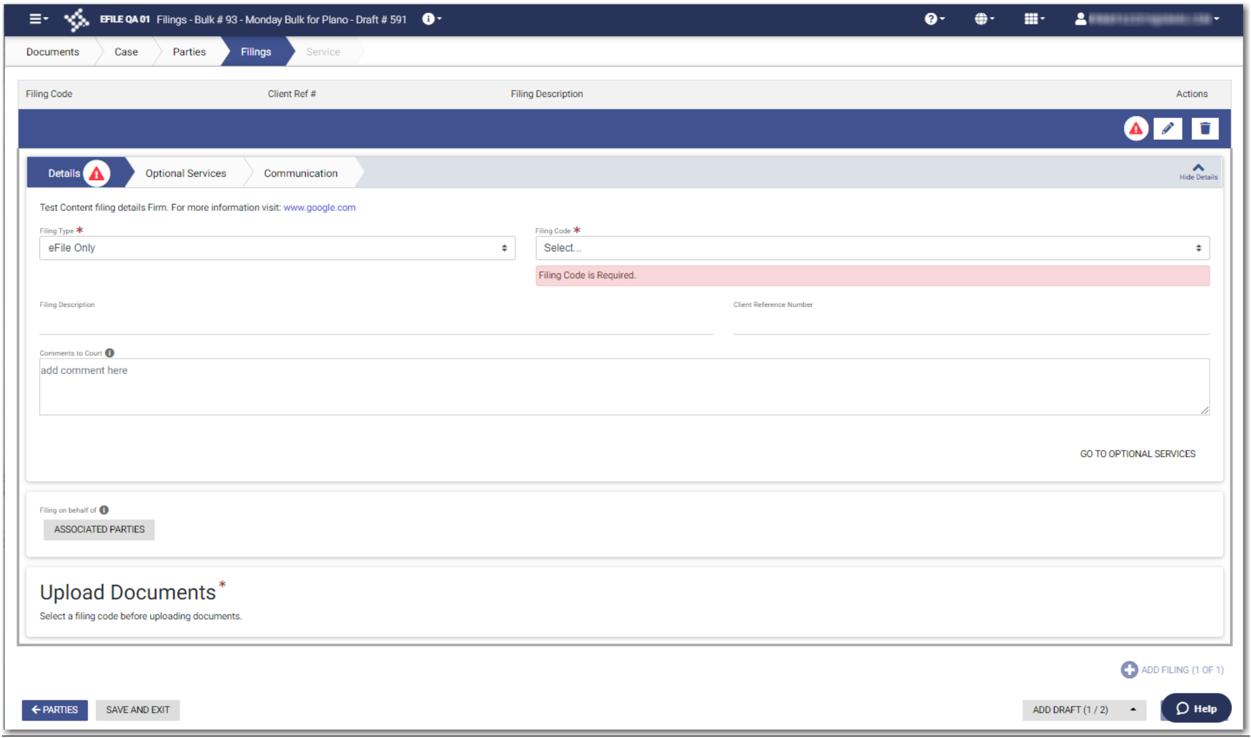



**Figure 15.14 – Sample Filings Page**

**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.

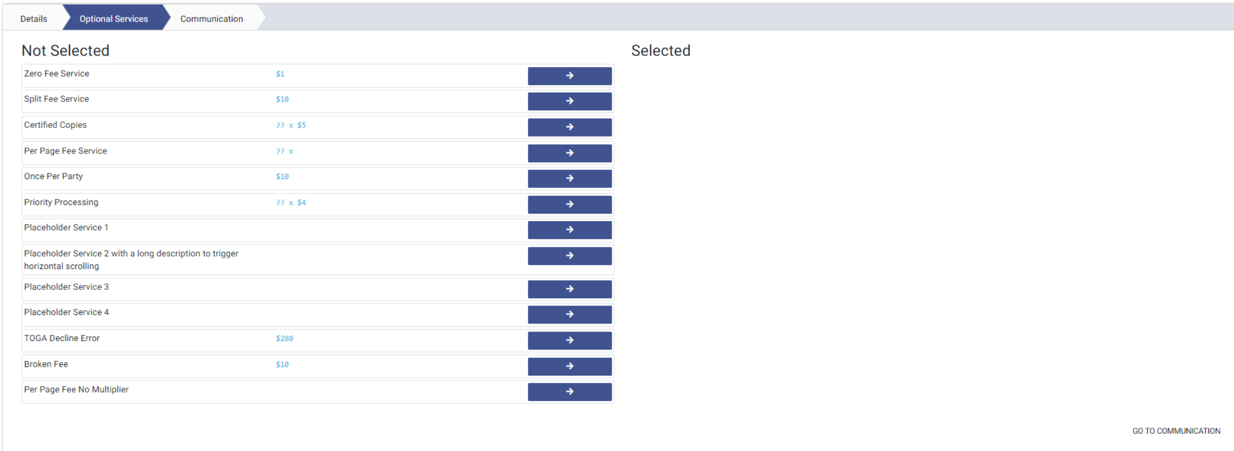
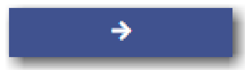
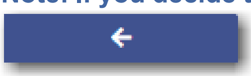



**Figure 15.15 – Sample Optional Services Tab**

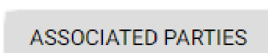
7. To select the applicable optional services, click  .

   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**  **.**

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.

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

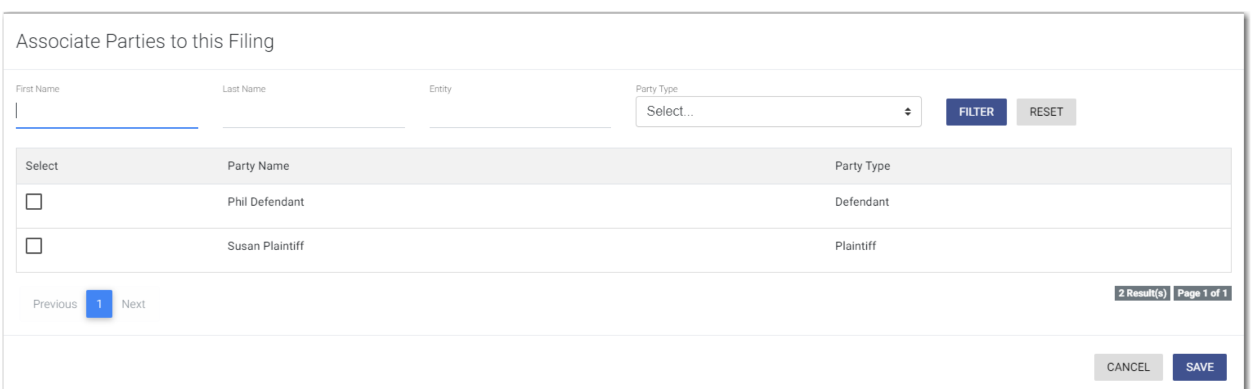



**Figure 15.16 – Associate Parties to this Filing Window**

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.

13. Click SAVE.

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.**

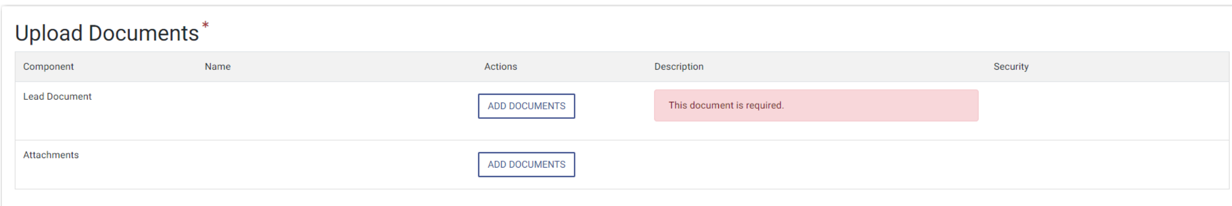



**Figure 15.17 – Upload Documents Pane**

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

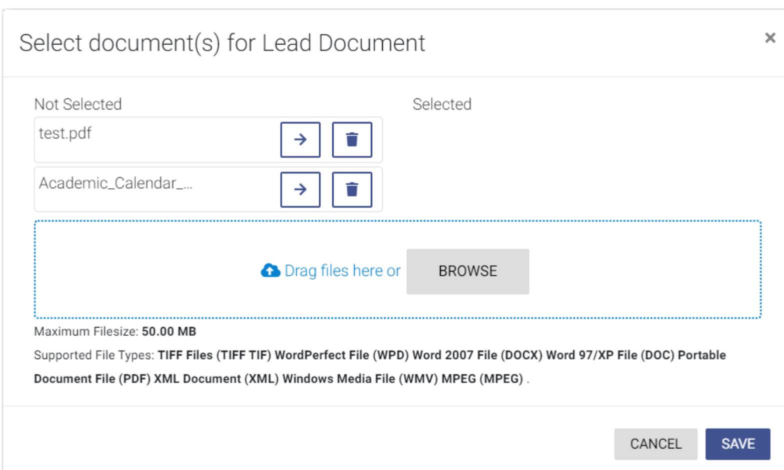
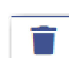



**Figure 15.18 – Select document(s) for Lead Document Window**

**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 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 SAVE.

17. If you have attachments to add to the filing, click ADD DOCUMENTS 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. Click SERVICE → to save your work and continue, click ADD DRAFT (1 / 2) to add another 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 *Bulk Fees / Summary* page.

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

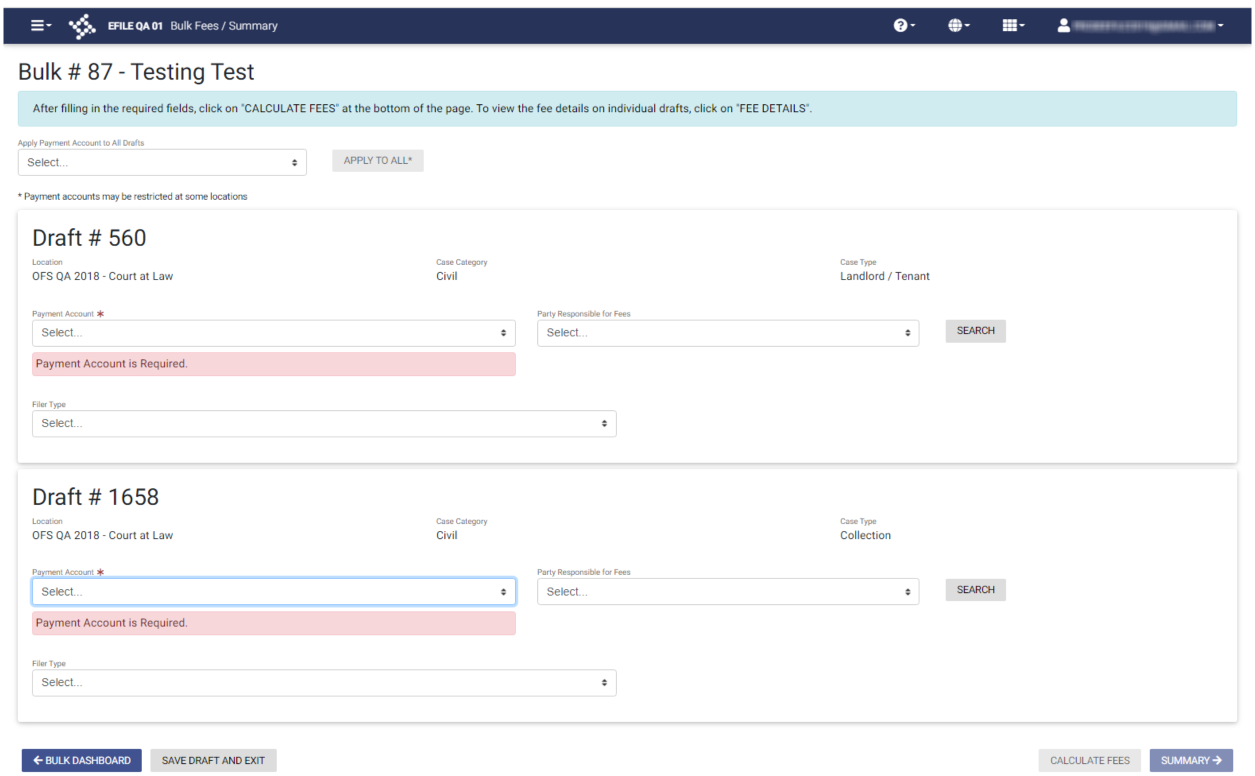



**Figure 15.19 – Sample Bulk Fees / Summary Page—Blank Fields**

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

To enter the payment information for your bulk filing:

1. Select the payment account from the **Apply Payment Account to All Drafts** drop-down list. Then, click APPLY TO ALL* to apply the selected payment account to all of the 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 SEARCH if you want to search for a party.

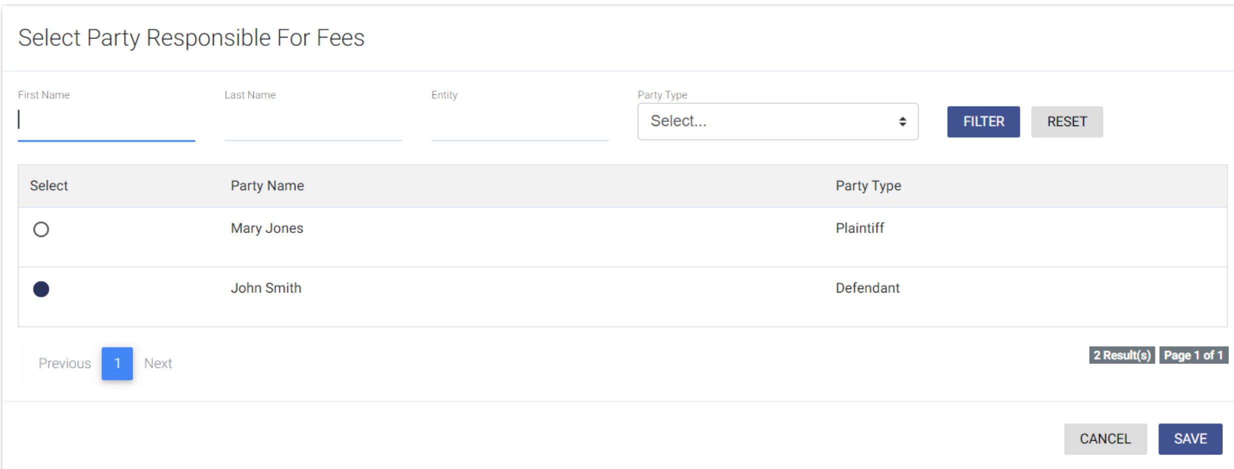



**Figure 15.20 – Select Party Responsible For Fees Window**

   **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.

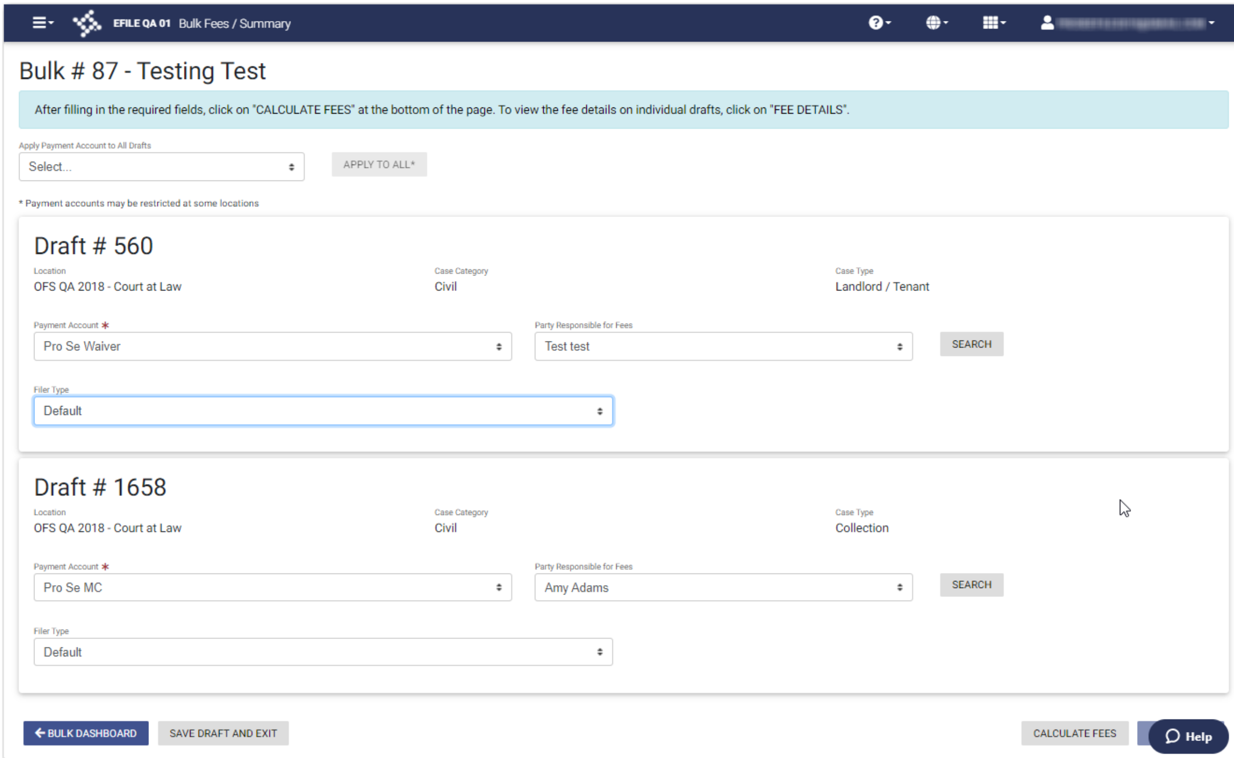



**Figure 15.21 – Sample Bulk Fees / Summary Page—Completed Fields**

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

   The **Fee Details** button is displayed.

5. Click FEE DETAILS.

   The *Fee Details* window is displayed.

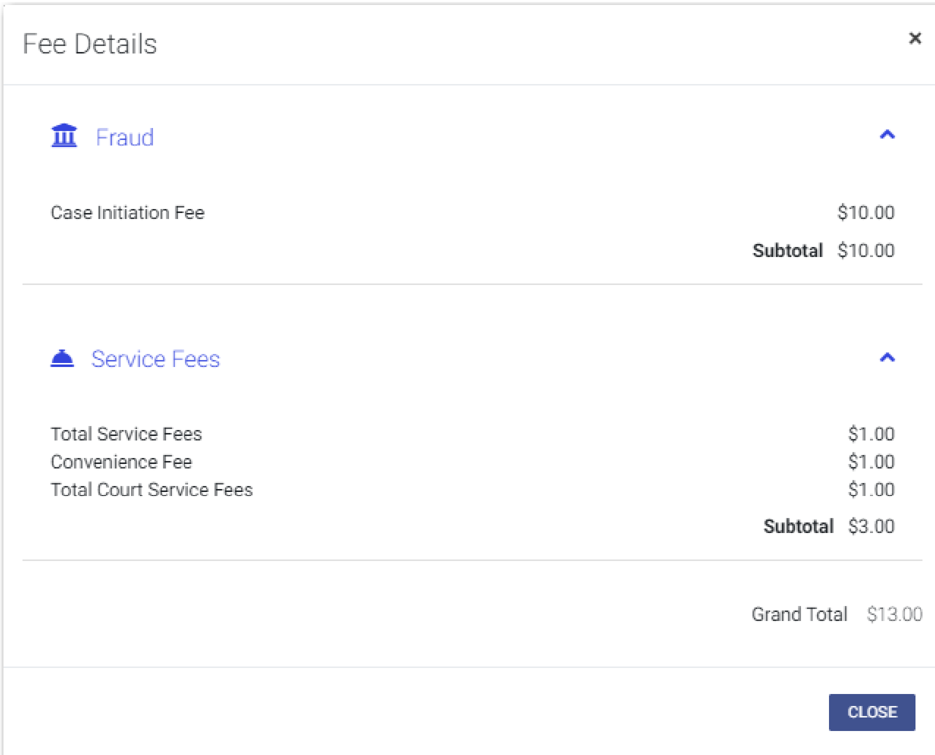



**Figure 15.22 – Sample Fee Details Window**

6. Review the filing fees, and then click 

.

# 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 

.

   The *Bulk Fees / Summary* page is displayed.

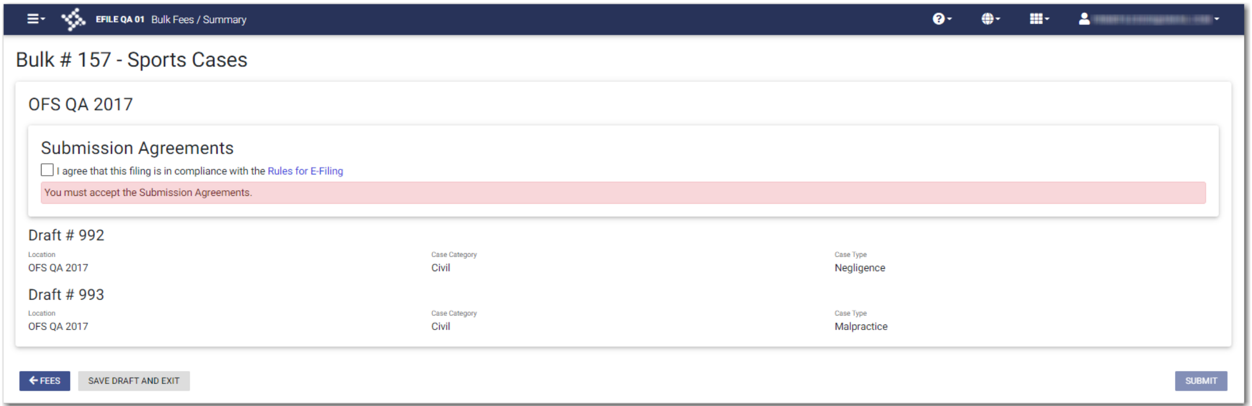



**Figure 15.23 – Sample Bulk Fees / Summary Page—Submission Agreements Not Accepted**

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 

.

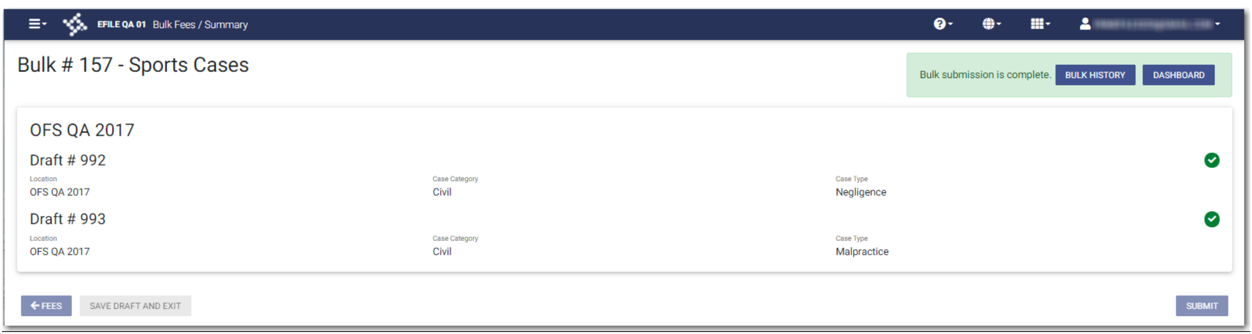



**Figure 15.24 – Sample Bulk Fees / Summary Page After Filing is Submitted**

5. Click 

to return to the *Bulk History* page, or click 

to return to the *Dashboard* page.

# 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.

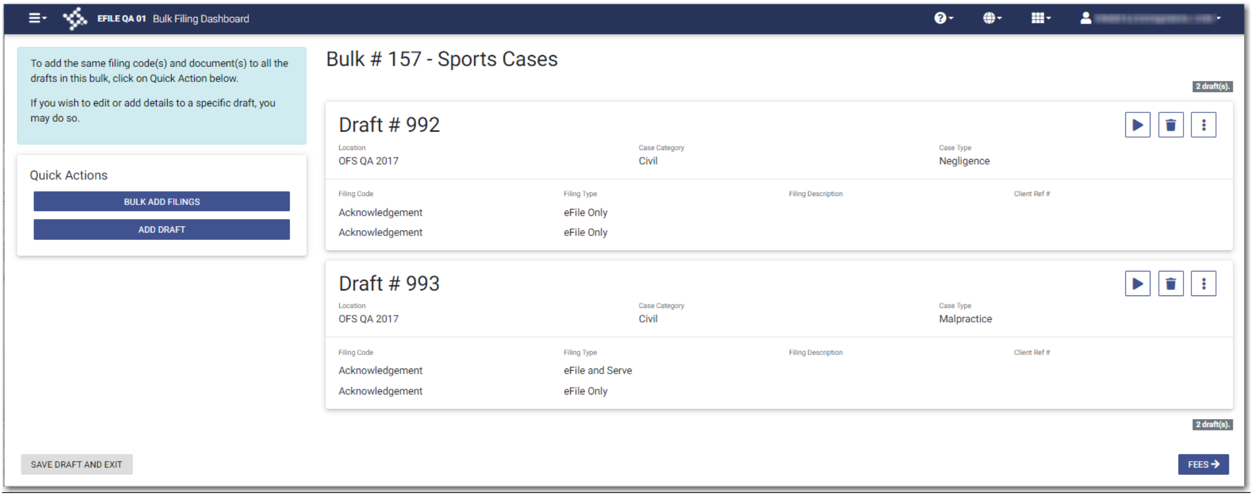



**Figure 15.25 – Sample Bulk Filing Dashboard Page**

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.

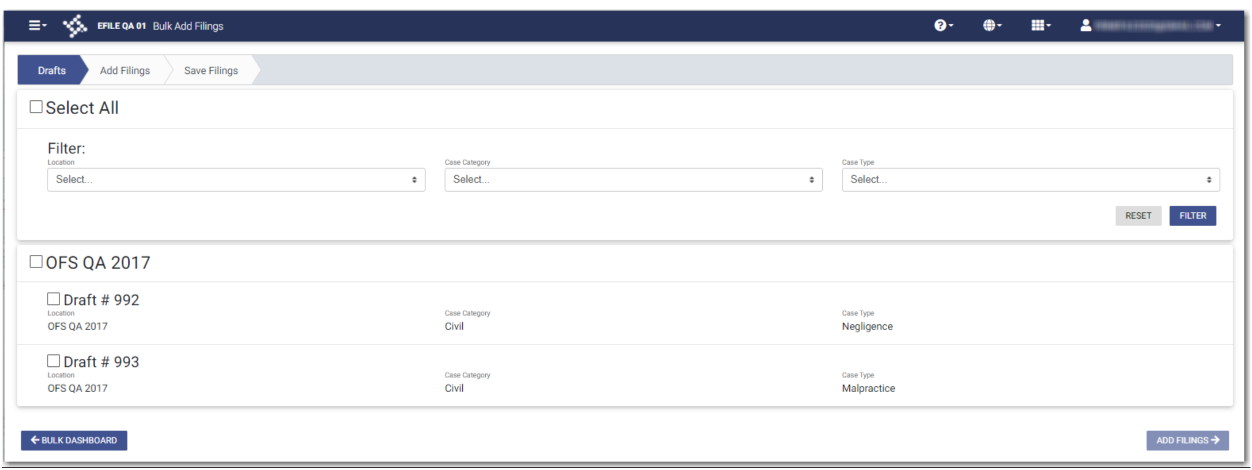



**Figure 15.26 – Drafts Tab on the Bulk Add Filings Page**

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 FILTER.
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.

4. Click ADD FILINGS →.

   The **Add Filings** tab is displayed.

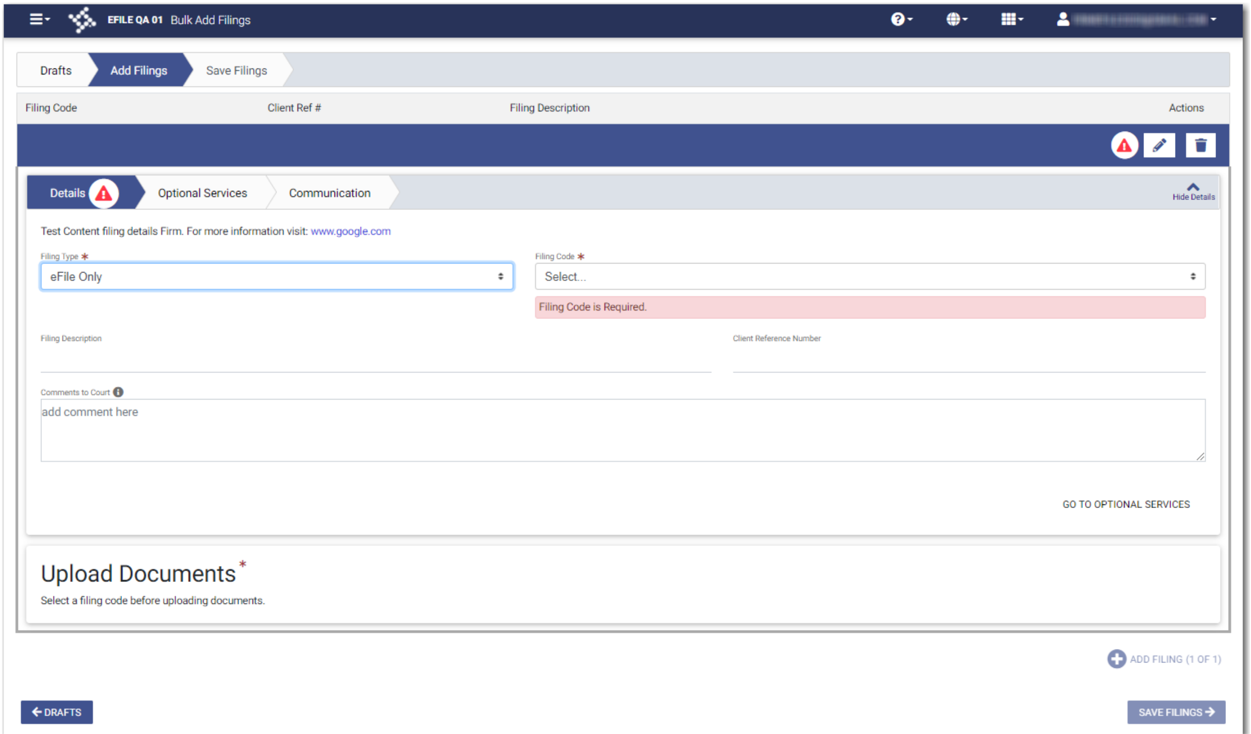



**Figure 15.27 – Add Filings Tab on the Bulk Add Filings Page**

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 ADD DOCUMENTS.

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

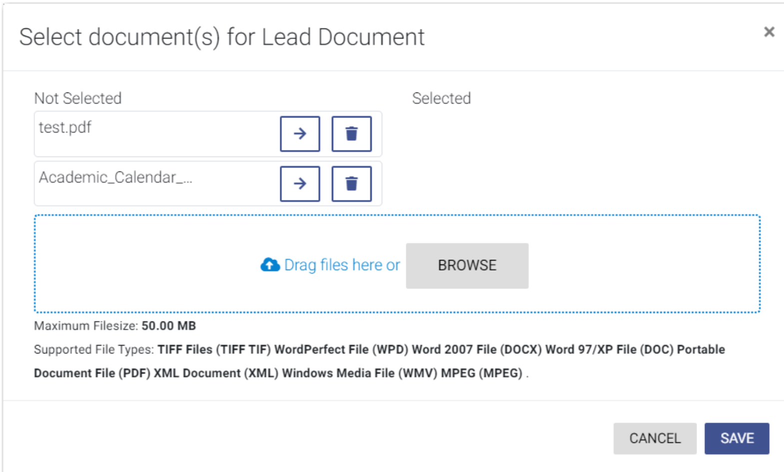
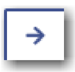
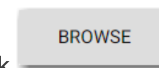



**Figure 15.28 – Select document(s) for Lead Document Window**

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

9. Click .

   The **Save Filings** tab is displayed.

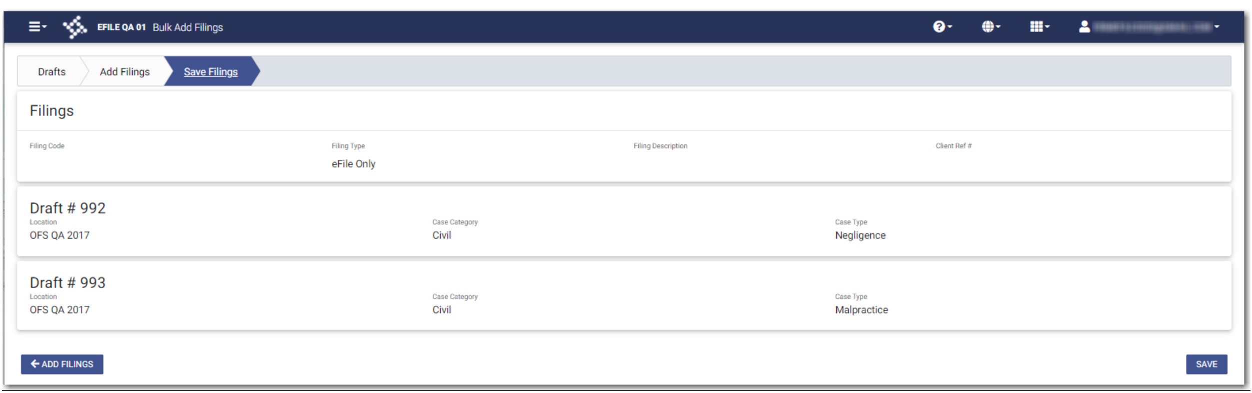



**Figure 15.29 – Save Filings Tab on the Bulk Add Filings Page**

10. On the **Save Filings** tab, click .

    The **Associate Parties** button is displayed for each filing.

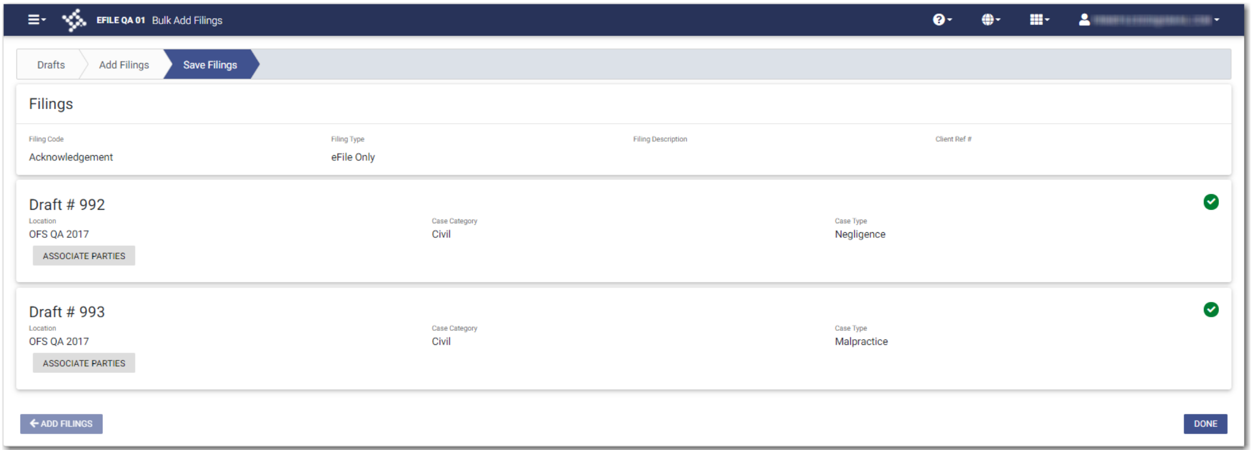



**Figure 15.30 – Associate Parties Button Displayed in the Save Filings Tab**

11. Click ASSOCIATE PARTIES .

The *Select Filings* window is displayed.

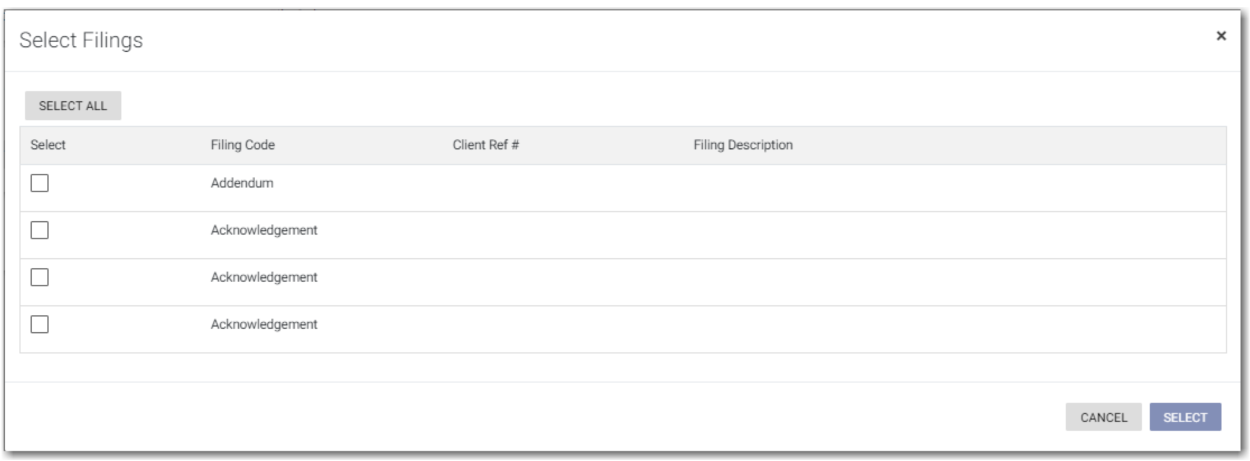



**Figure 15.31 – Select Filings Window**

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

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

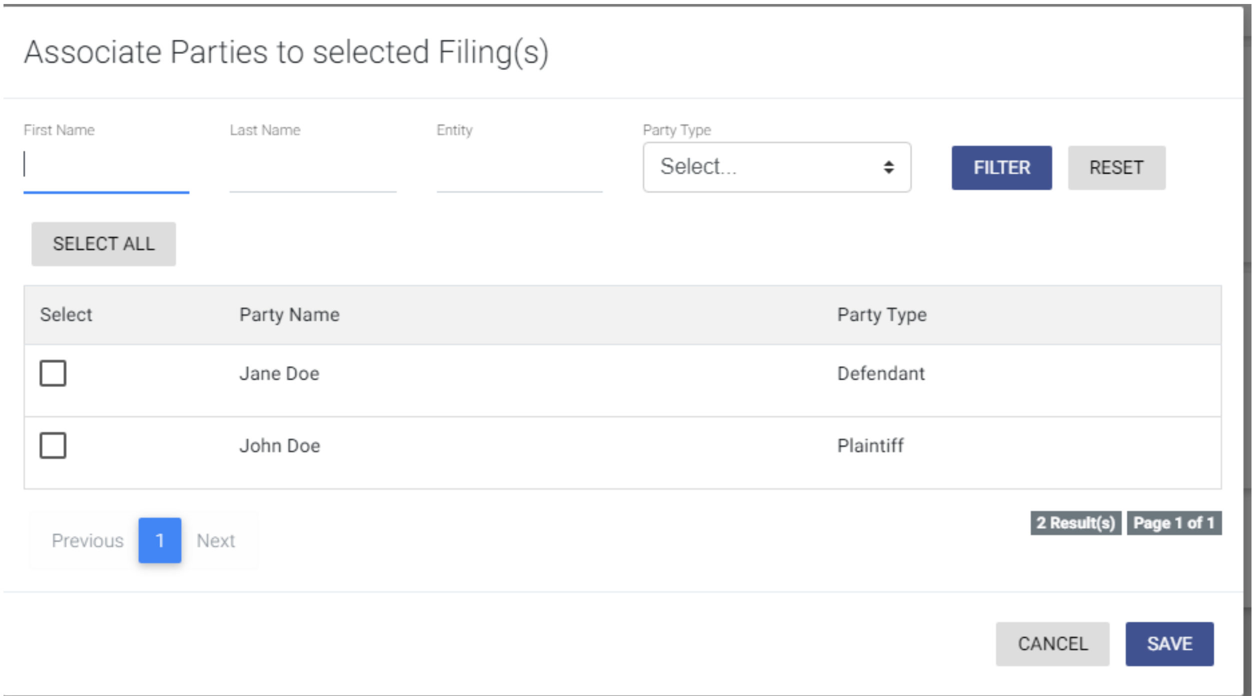
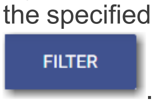



**Figure 15.32 – Associate Parties to Selected Filing(s) Window — Blank**

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 

.

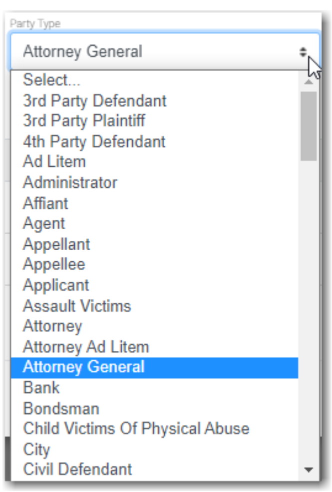
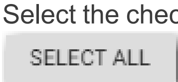
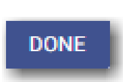



**Figure 15.33 – Party Type Drop-Down List**

14. Select the check box for the filing that you want to associate with the added party, or click 

.

15. Click 

, and then click 

.

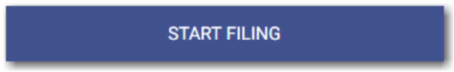
The parties are now associated with the specified bulk filing. The *Bulk Filing Dashboard* page is displayed with the bulk filing you just modified.

# Filing into Multiple Existing Cases

You can file into a bulk filing that already contains multiple existing cases.

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

To file into multiple existing cases:

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

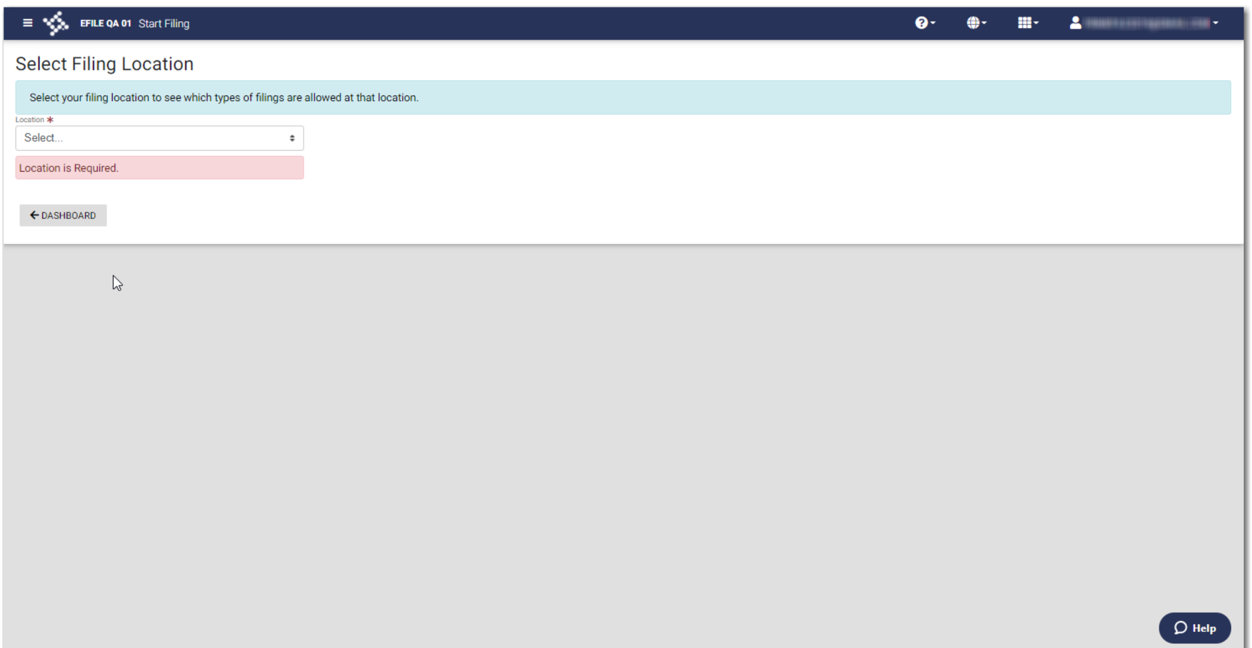



**Figure 15.34 – Start Filing Page**

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.**

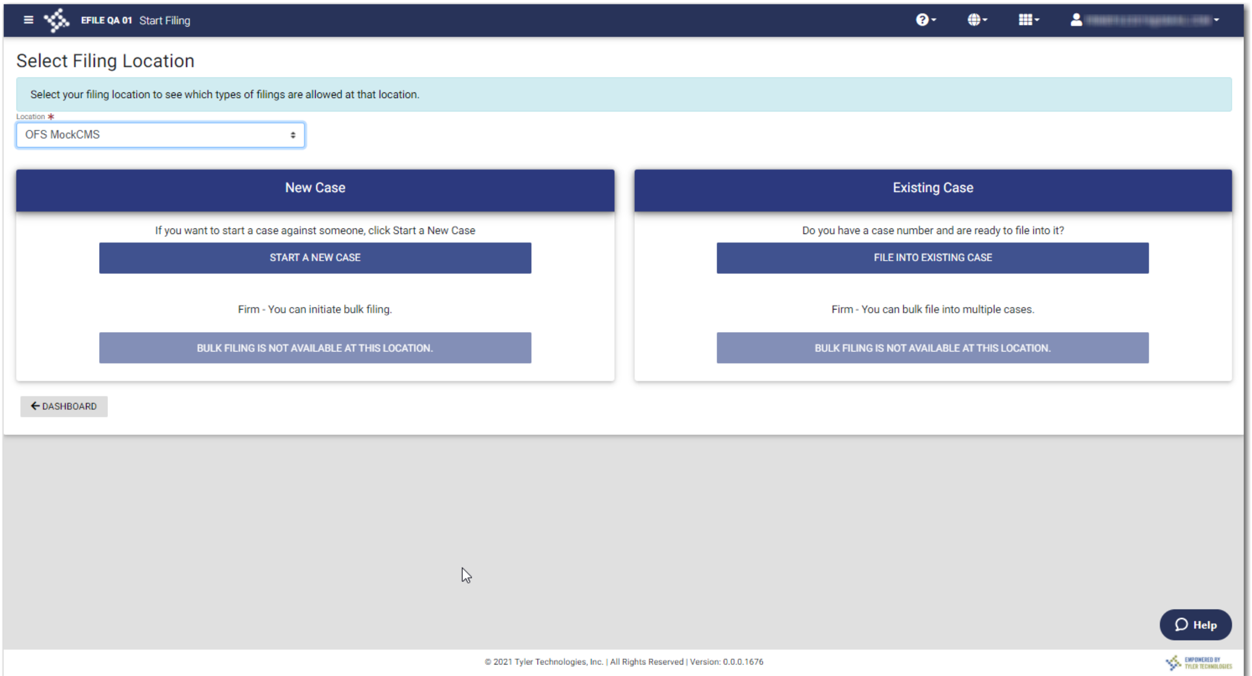



**Figure 15.35 – Start Filing Page—Bulk Filing Not Supported**

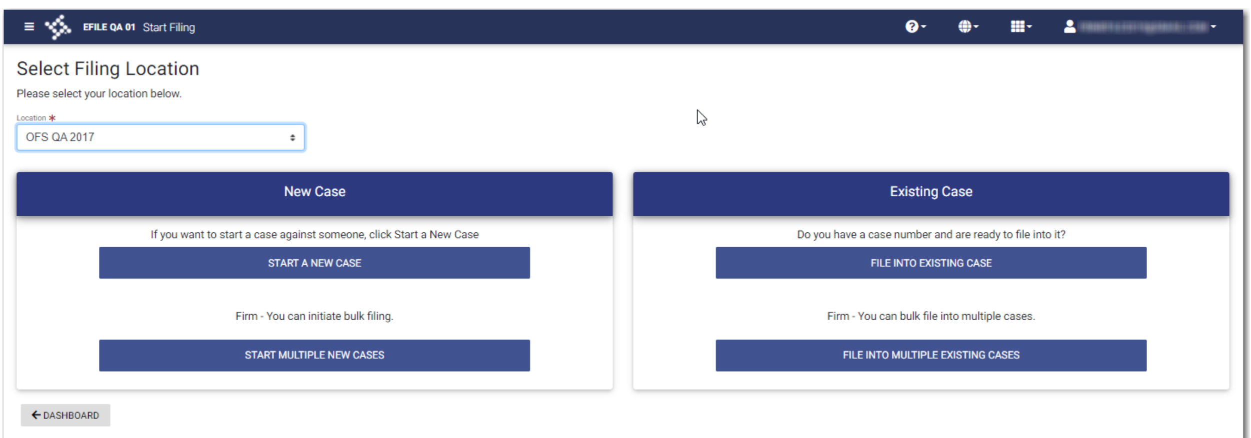



**Figure 15.36 – Start Filing Page—Bulk Filing Supported**

3. Click 

.

   The *Bulk Filing* window is displayed.

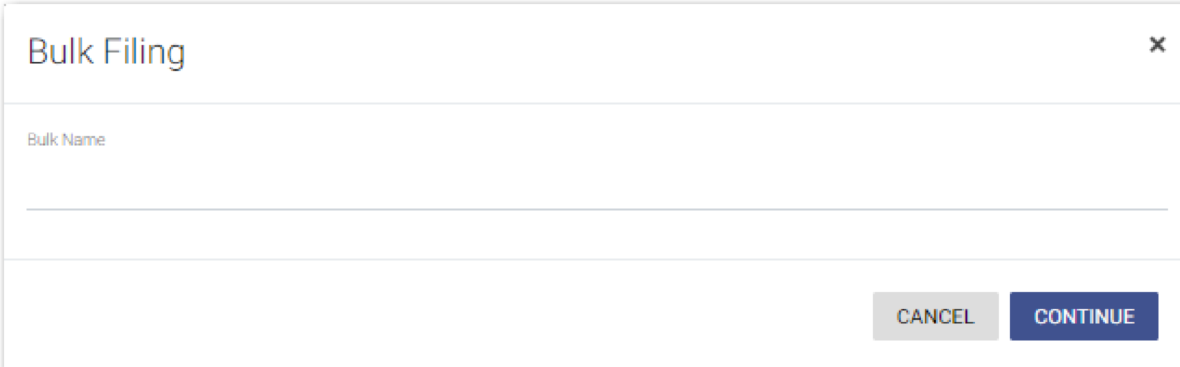



Figure 15.37 – Bulk Filing Window

4. Type the name of the bulk filing that you want to file into, and then click  .

   The *Bulk Filing Dashboard* page is displayed.


Figure 15.38 – Sample Bulk Filing Dashboard Page

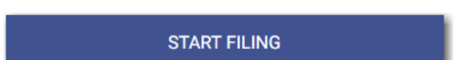
5. In the Quick Actions pane, select the method by which you want to search for the cases that you want to add to your bulk—**Case Search**, **Bookmarks Search**, or **Filing History Search**.
6. Click the button for the method you selected, and then follow the prompts for that method.

# 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  .

   The *Start Filing* page is displayed.

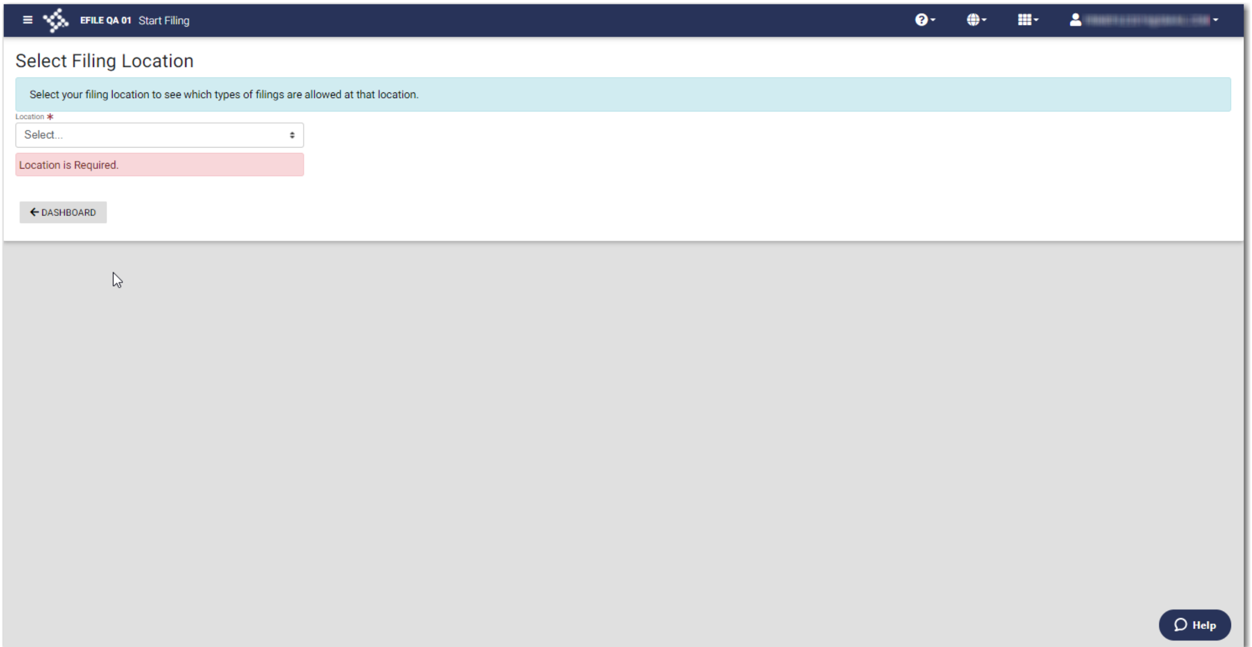



Figure 15.39 – Start Filing Page

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

   The New Case and Existing Case panes are displayed.

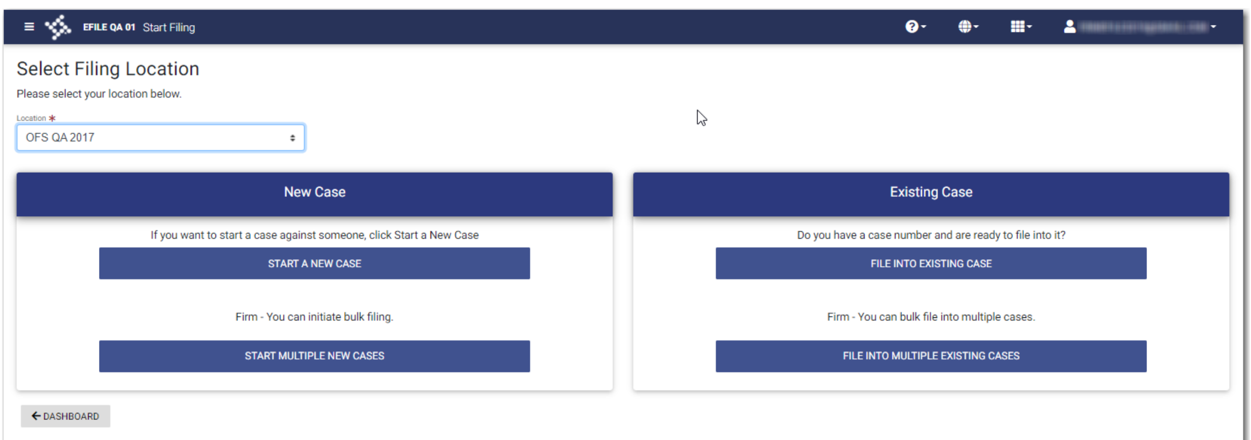



Figure 15.40 – Start Filing Page—Bulk Filing Supported

3. Click 

.

   The *Bulk Filing* window is displayed.

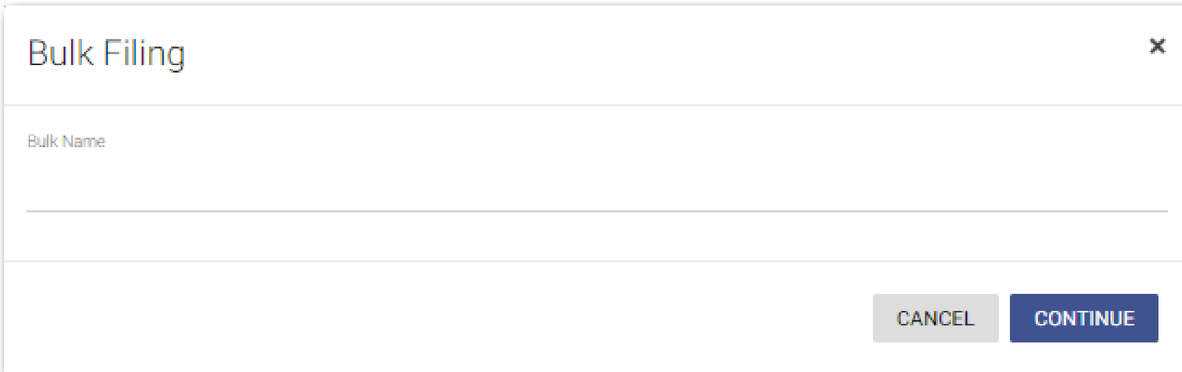



**Figure 15.41 – Bulk Filing Window**

4. Type the name of the bulk filing that you want to file into, and then click .

   The *Bulk Filing Dashboard* page is displayed.


**Figure 15.42 – 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.

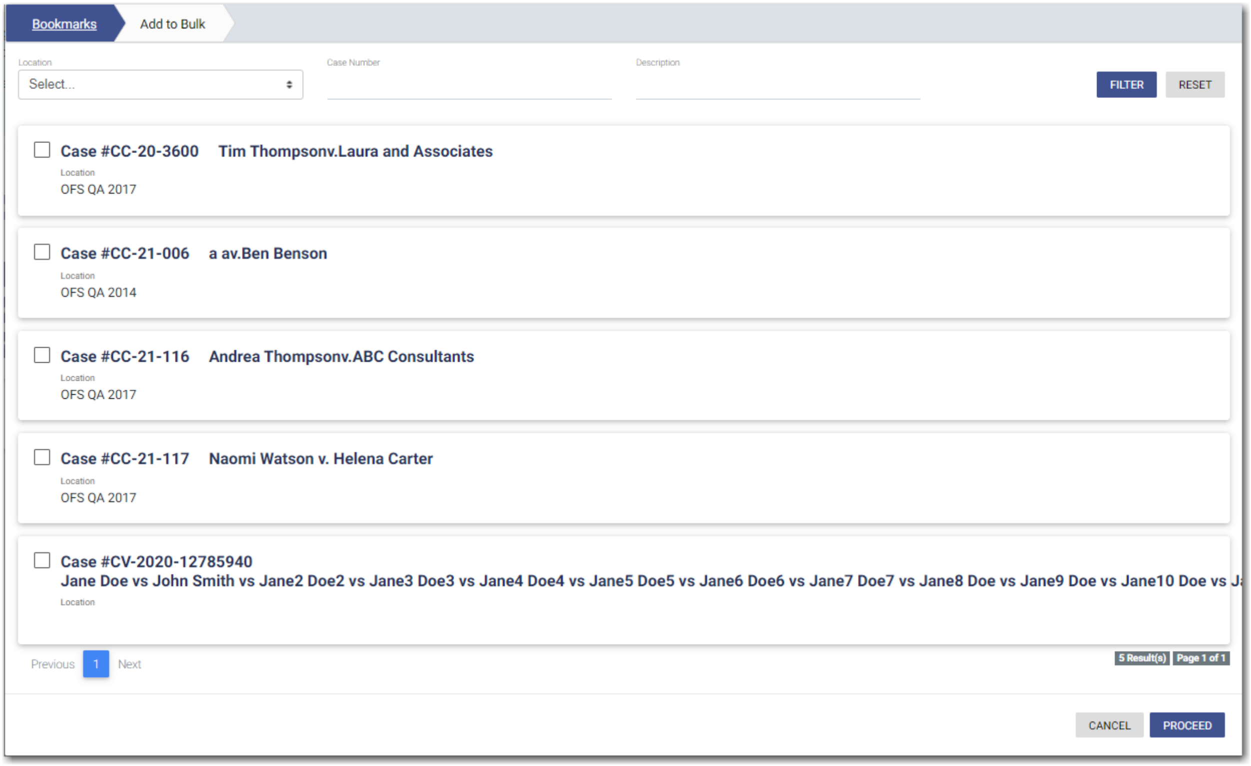



**Figure 15.43 – Sample Bookmarks Window**

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

   **Note: If your bulk filing is not displayed in the *Bookmarks* window, you can search for the bulk filing that you want. Select the location from the Location drop-down list, and then type the case number in the Case Number field. Then, click FILTER.**

   The *Add to Bulk* window is displayed.

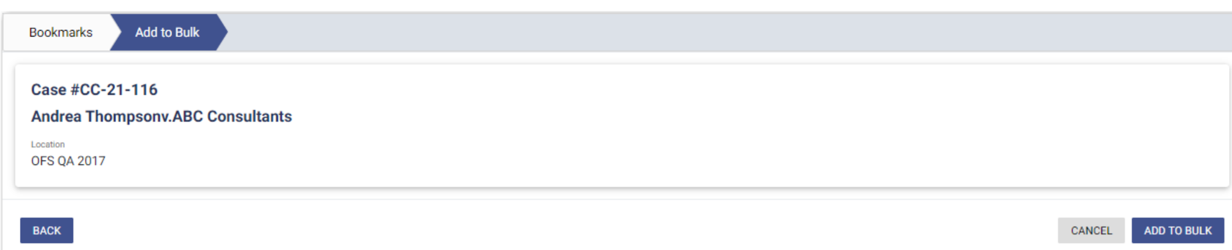



**Figure 15.44 – Add to Bulk Window**

7. Click ADD TO BULK, and then click DONE.

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

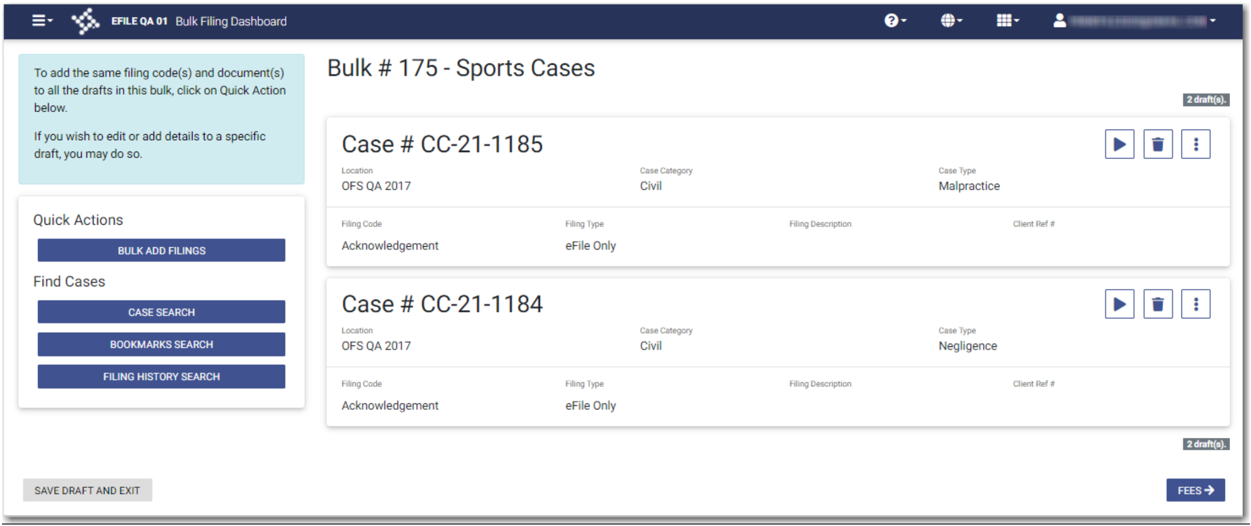


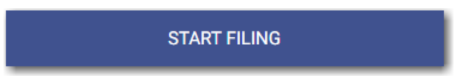

**Figure 15.45 – Sample Bulk Filing Dashboard Page—Case Added to Bulk**

# 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.**

To file into multiple existing cases using Case Search:

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

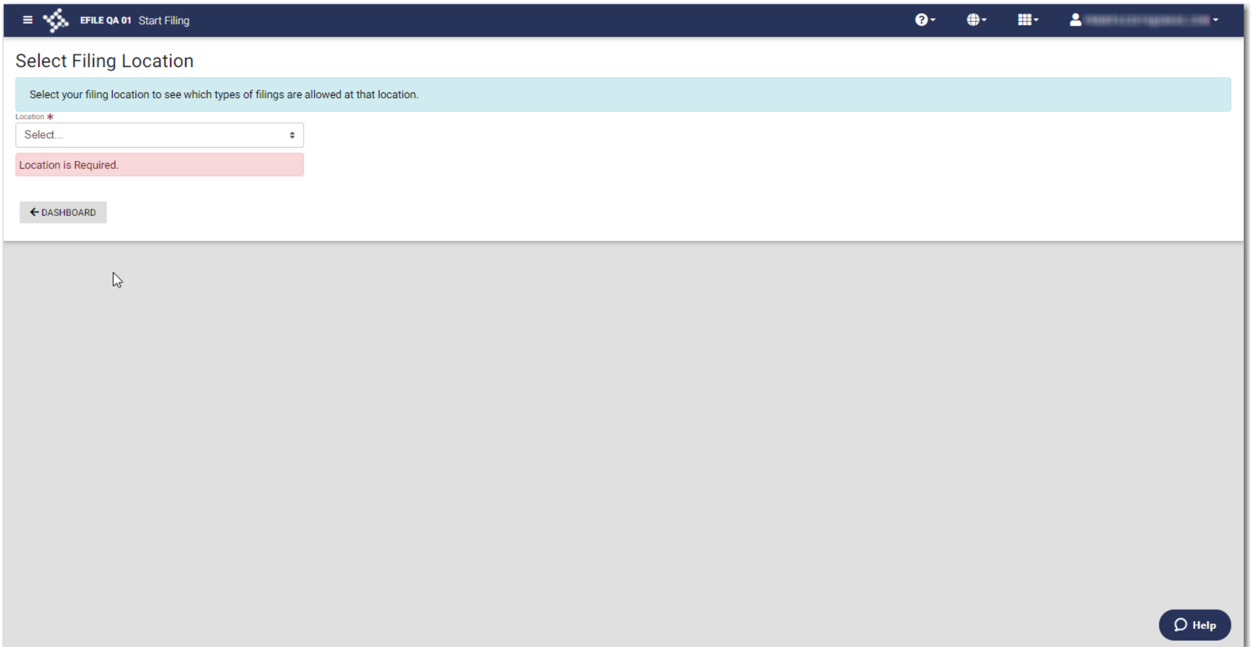



Figure 15.46 – Start Filing Page

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

   The New Case and Existing Case panes are displayed.

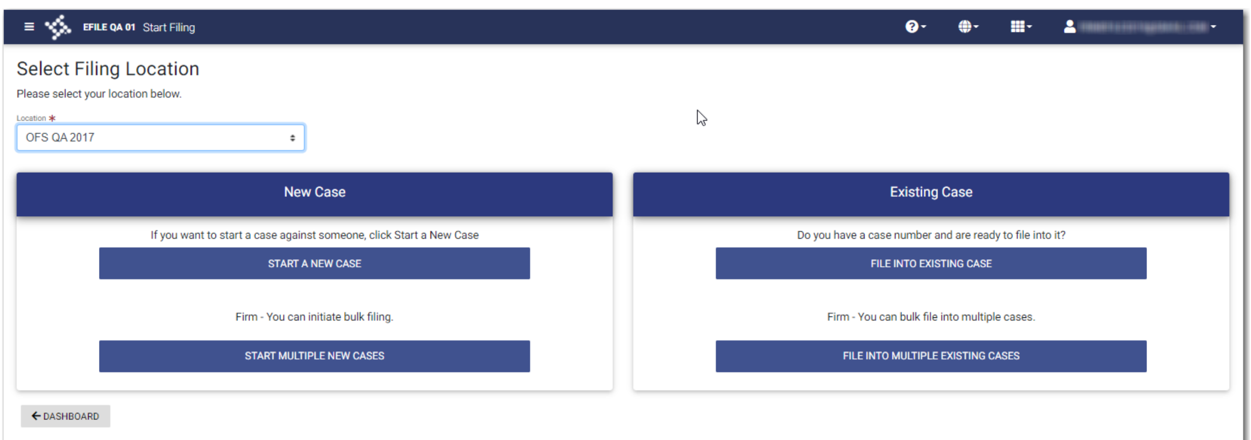



Figure 15.47 – Start Filing Page—Bulk Filing Supported

3. Click 

.

   The *Bulk Filing* window is displayed.

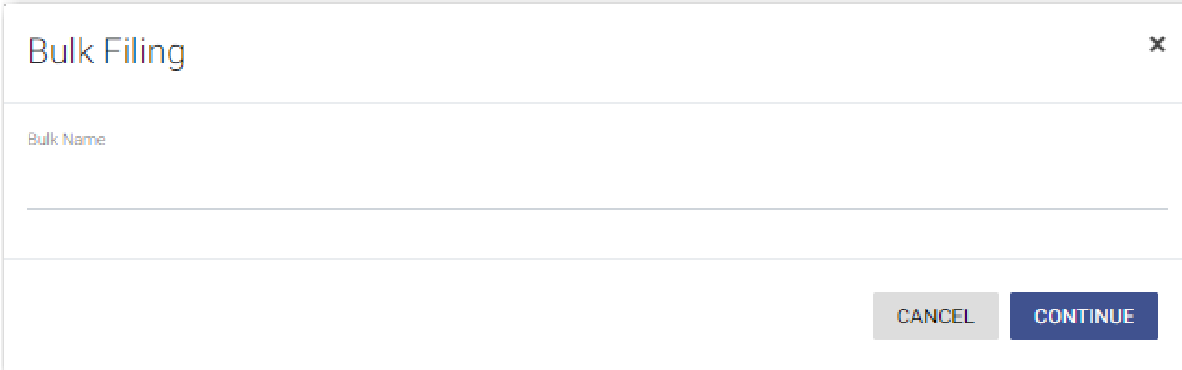



Figure 15.48 – Bulk Filing Window

4. Type the name of the bulk filing that you want to file into, and then click 

.

   The *Bulk Filing Dashboard* page is displayed.


Figure 15.49 – Sample Bulk Filing Dashboard Page

5. In the Quick Actions pane, click 

.

   The *Case Search* window is displayed.

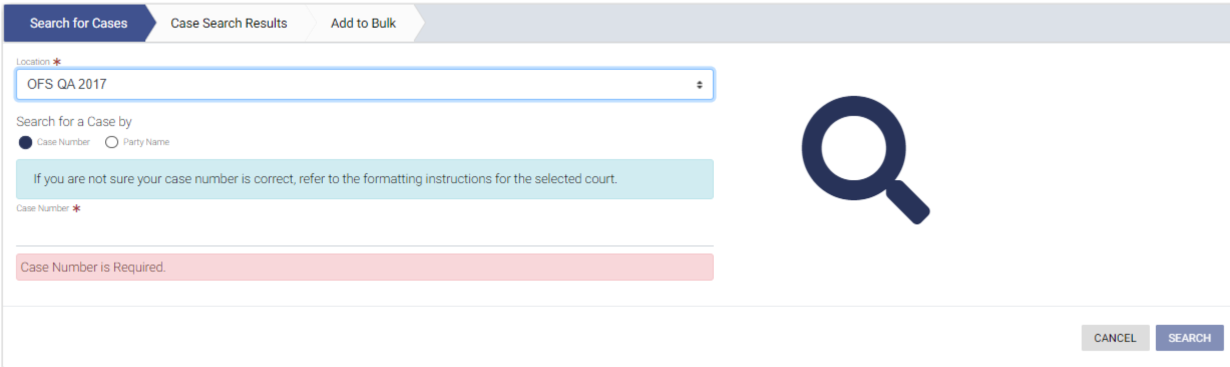



Figure 15.50 – Case Search Window

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

7. Type the number for the case you want to locate, and then click **SEARCH** or press ENTER.

   The *Case Search Results* window is displayed.

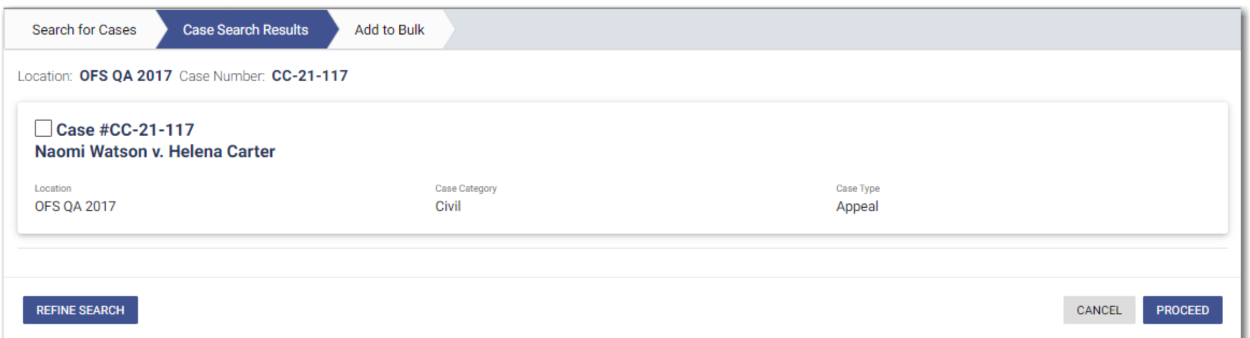



Figure 15.51 – Case Search Results Window

8. If the case is the one you want to add to the bulk, select the check box, and then click **PROCEED**.

   The *Add to Bulk* window is displayed.

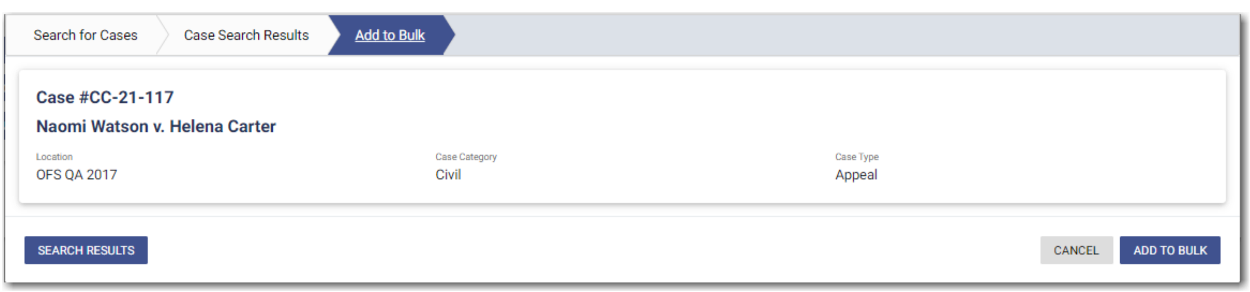



Figure 15.52 – Add to Bulk Window

**Note: If the case that results from the search is not correct, click REFINE SEARCH. Then search for your case again.**

**Note: If you do not click any cases in the *Case Search Results* window, you cannot proceed.**

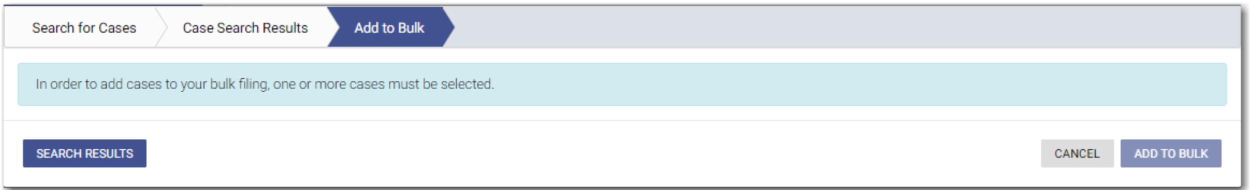



**Figure 15.53 – Case Search Message—No Cases Selected**

9. If the case that results from your search is correct and you selected the check box for that case, click 

, and then click 

.

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

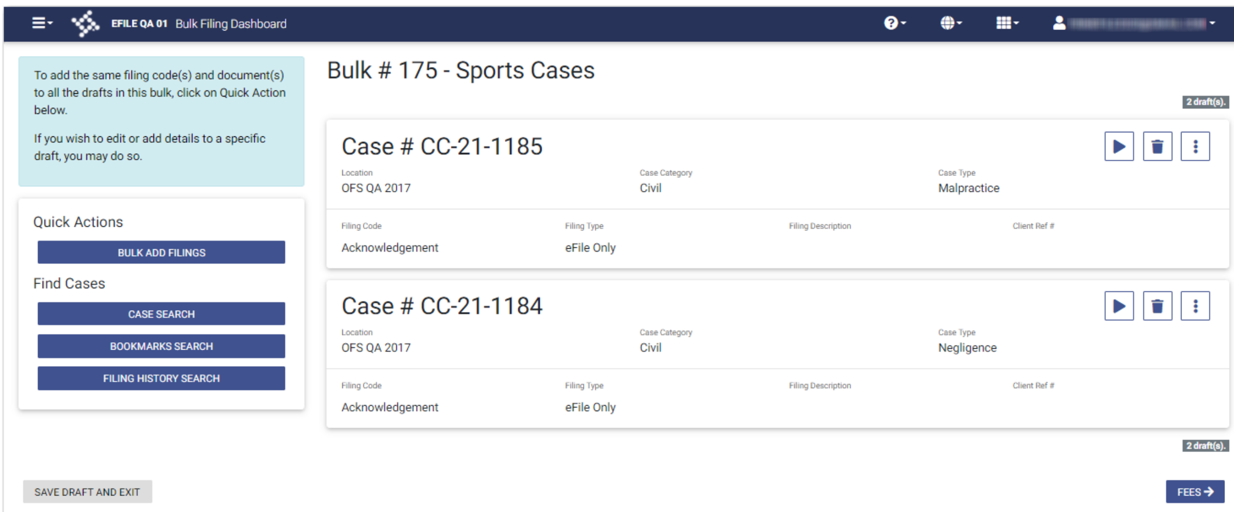


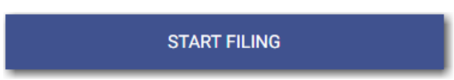

**Figure 15.54 – Sample Bulk Filing Dashboard Page—Case Added to Bulk**

# 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:

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

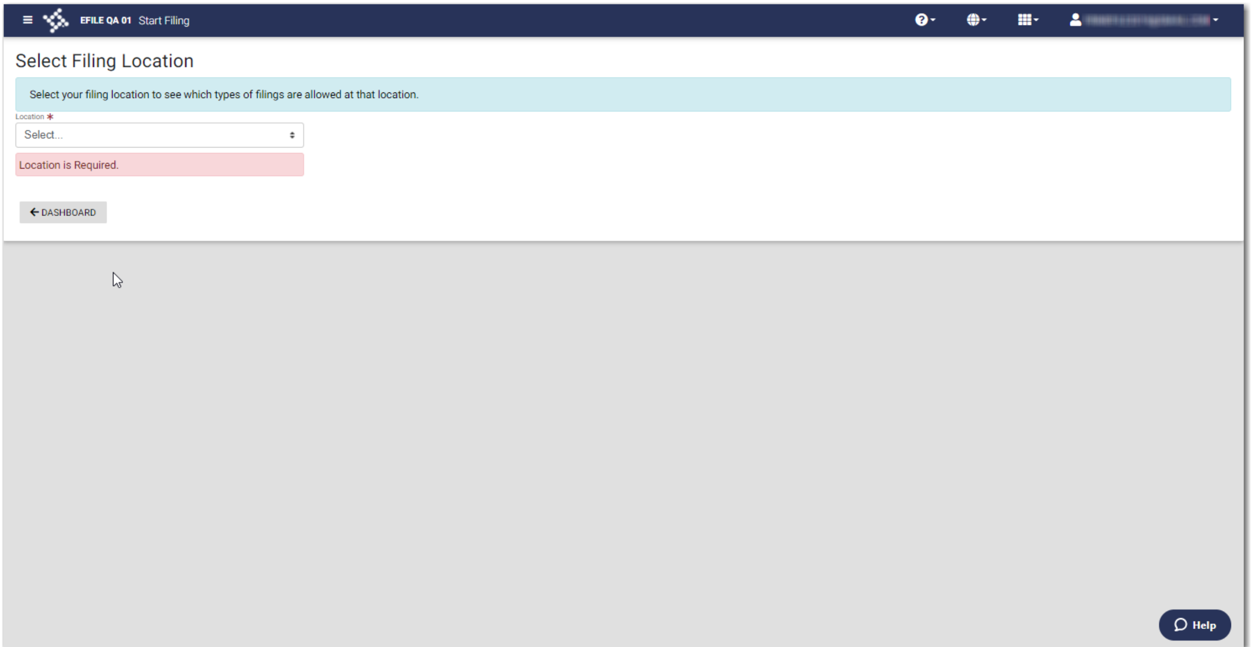



Figure 15.55 – Start Filing Page

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

   The New Case and Existing Case panes are displayed.

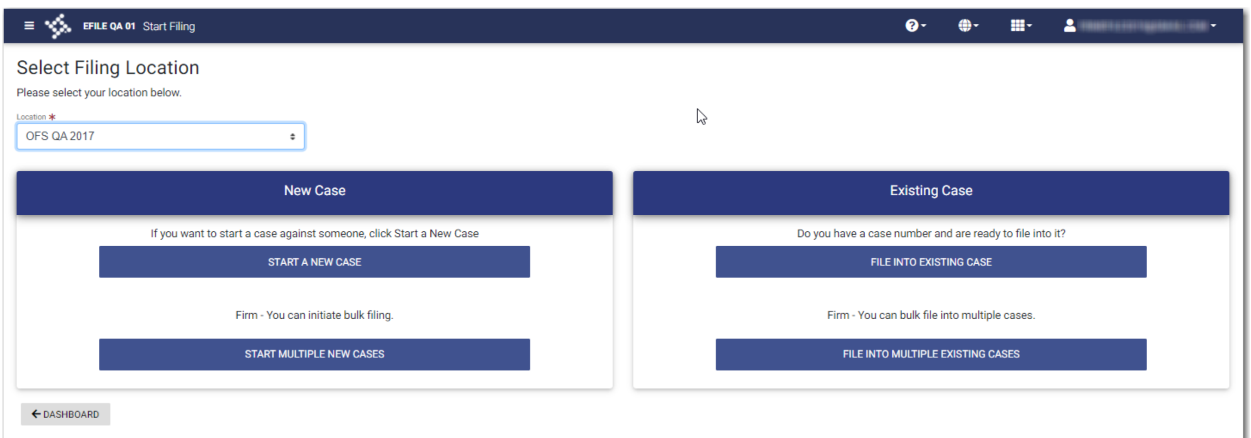



Figure 15.56 – Start Filing Page—Bulk Filing Supported

3. Click 

.

   The *Bulk Filing* window is displayed.

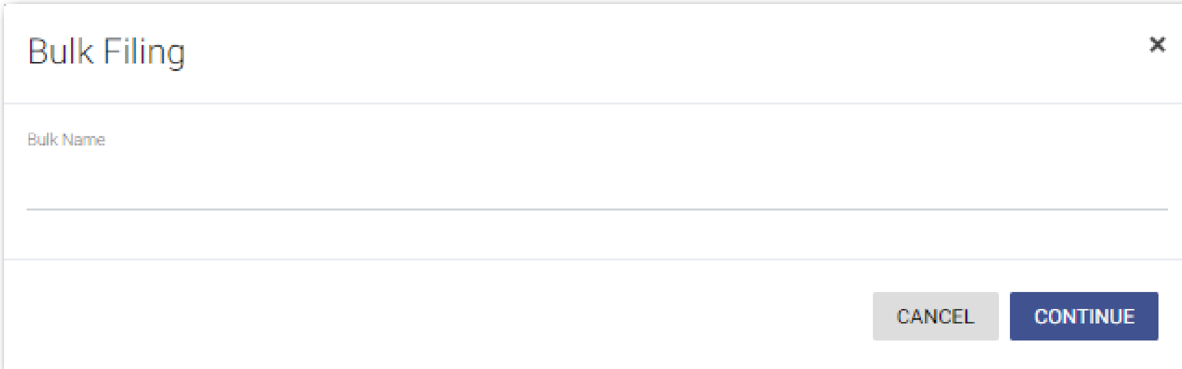



**Figure 15.57 – Bulk Filing Window**

4. Type the name of the bulk filing that you want to file into, and then click .

   The *Bulk Filing Dashboard* page is displayed.


**Figure 15.58 – Sample Bulk Filing Dashboard Page**

5. In the Quick Actions pane, click .

   The *Filing History* window is displayed.

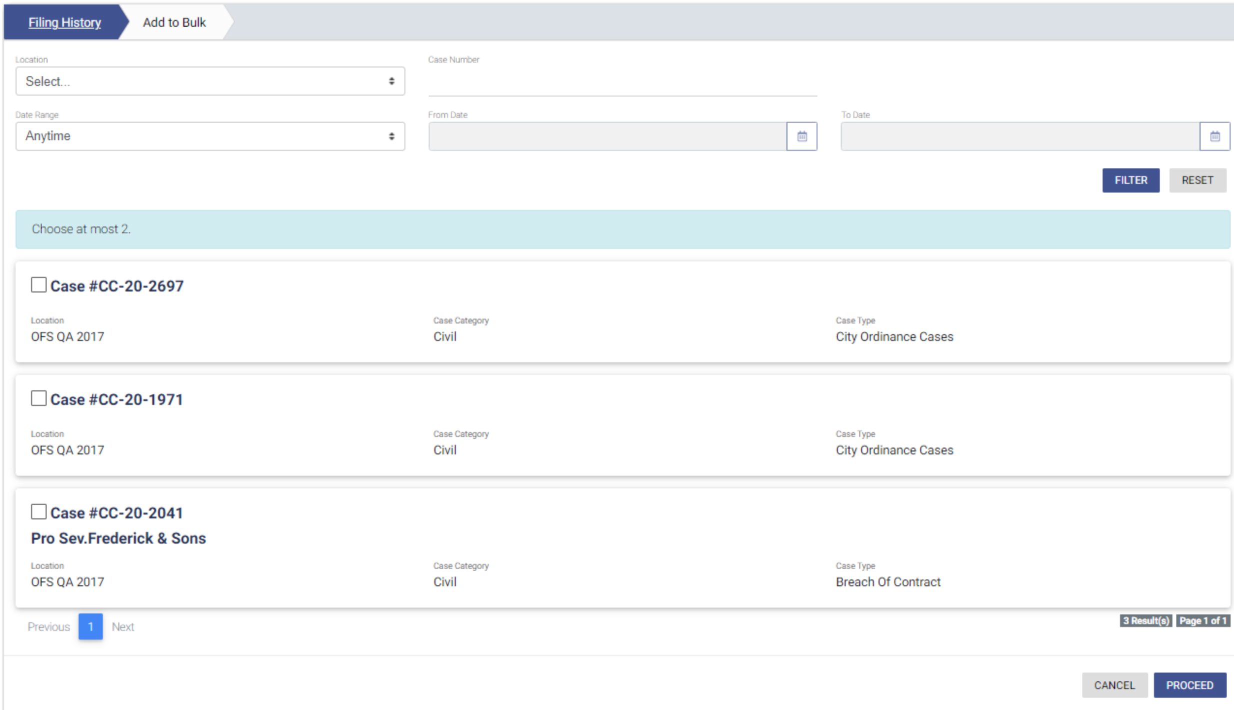



**Figure 15.59 – Sample Filing History Window**

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

   The *Add to Bulk* window is displayed.

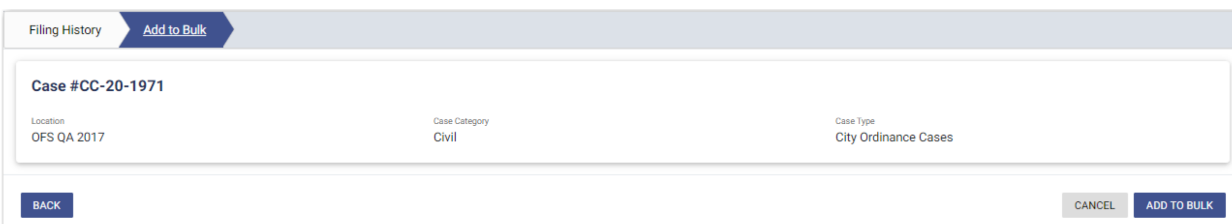



**Figure 15.60 – Add to Bulk Window**

**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 display. Then, click FILTER.**

7. Click ADD TO BULK, and then click DONE.

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

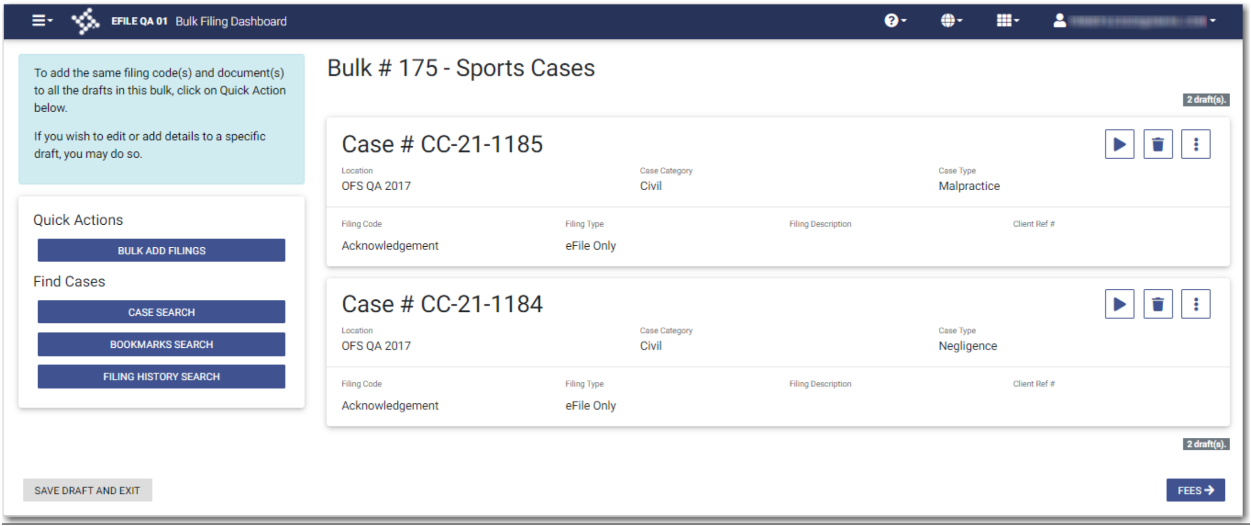



**Figure 15.61 – Sample Bulk Filing Dashboard Page—Case Added to Bulk**

# 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.

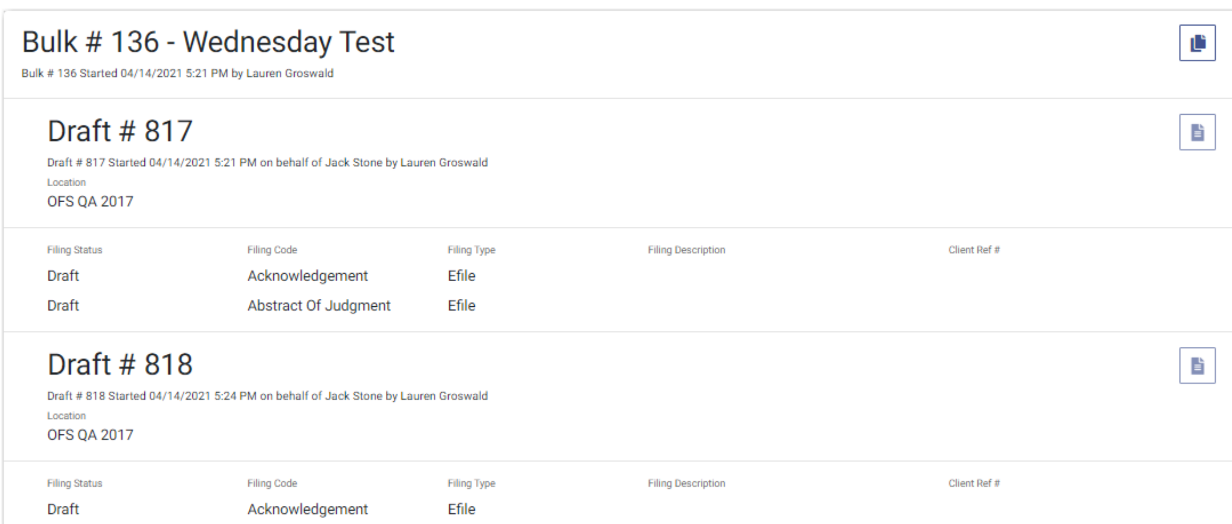



**Figure 15.62 – Sample Bulk Filing Pane**

3. Click  .

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

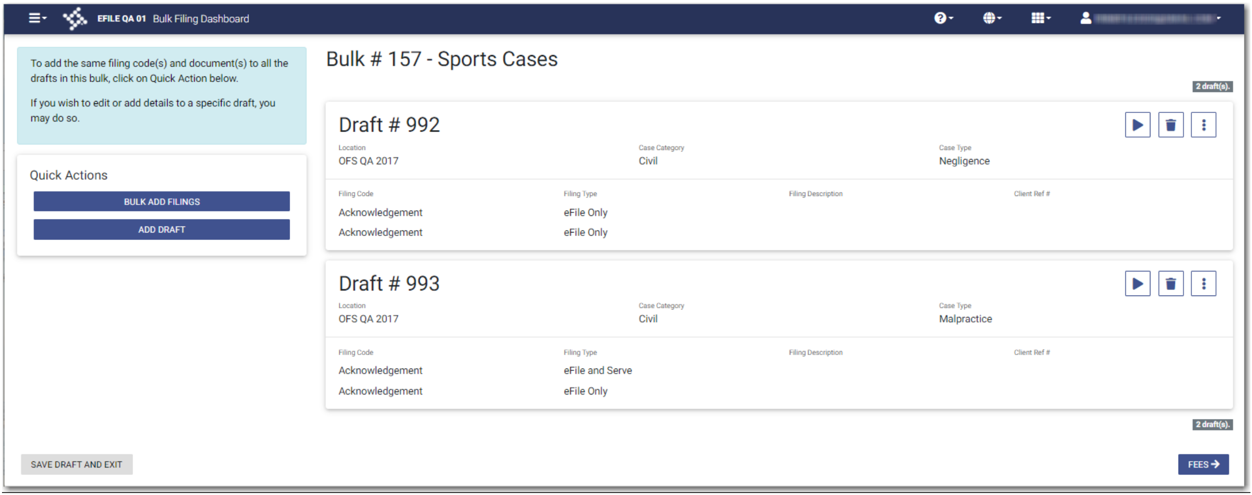



**Figure 15.63 – Sample Bulk Filing Dashboard**

4. Continue with your filing.

# 16 Vacation Letter (or Leave of Absence)

**Topics covered in this chapter**



You can create a filing in which you upload a vacation letter (or leave of absence). The letter can be attached to all selected cases that you designate.

**Note: Your configuration may include different verbiage in place of "vacation letter."**

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

After you submit a vacation letter filing, it is listed on the *Bulk History* page.

You can also save the vacation letter filing as a draft if you want to complete the filing at a later date. Draft vacation letter filings are listed on the *Bulk Drafts* page.

## Dashboard

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

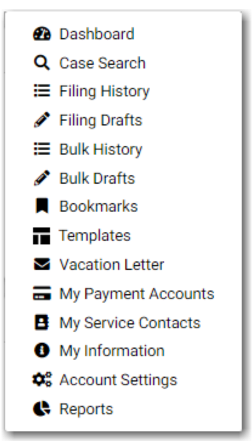



**Figure 16.1 – Dashboard**

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 *File Vacation Letter* page to create a filing in which you upload a vacation letter (or leave of absence).
- 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 vacation letter (or leave of absence) filings.

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

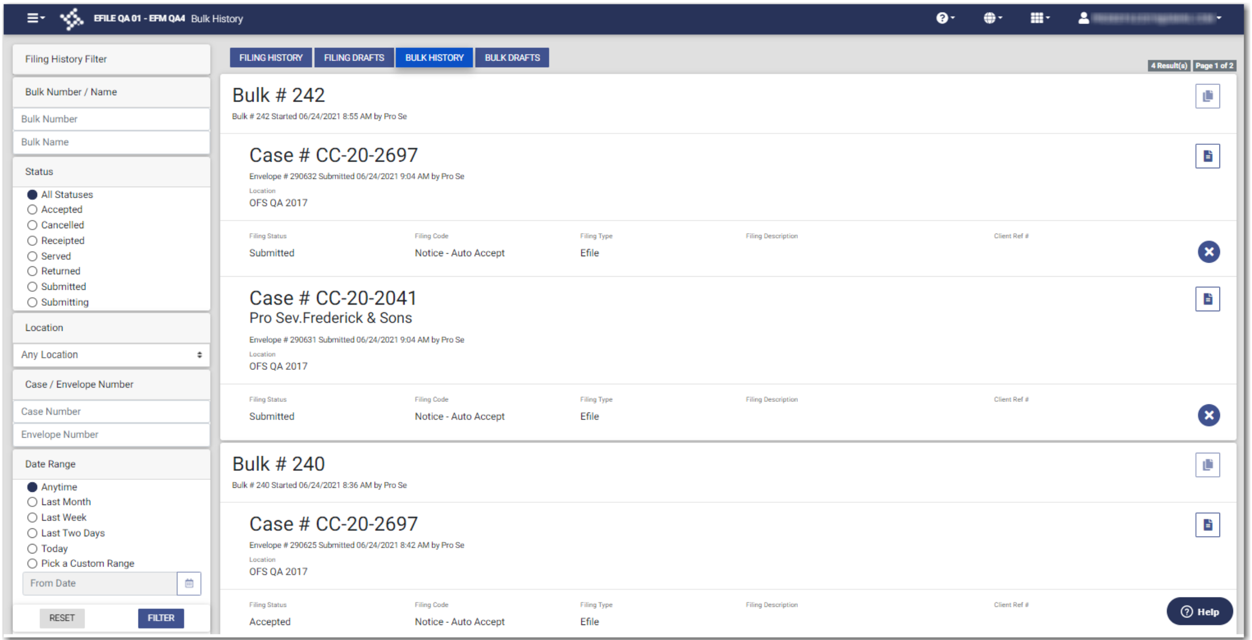



**Figure 16.2 – Sample Bulk History Page**

# Bulk Drafts

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

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

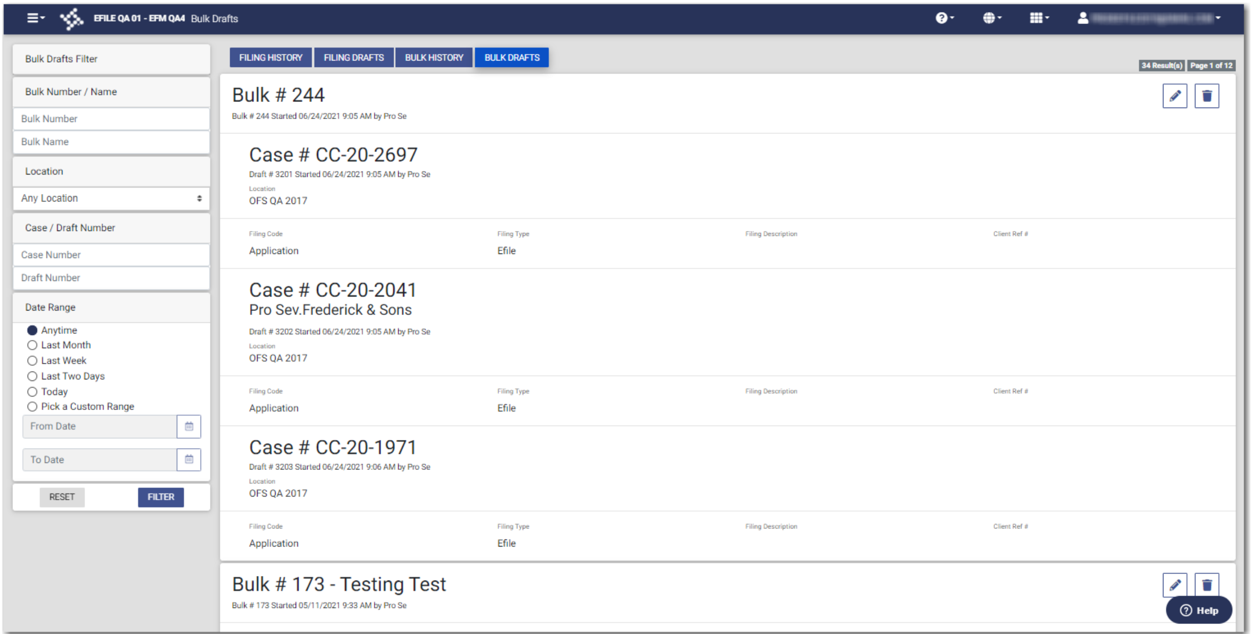



**Figure 16.3 – Sample Bulk Drafts Page**

# Filing a Vacation Letter (or Leave of Absence)

You can start a vacation letter (or leave of absence) filing from the Dashboard menu or the *Dashboard* page.

**Note: Your configuration may include different verbiage in place of “vacation letter.”**

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

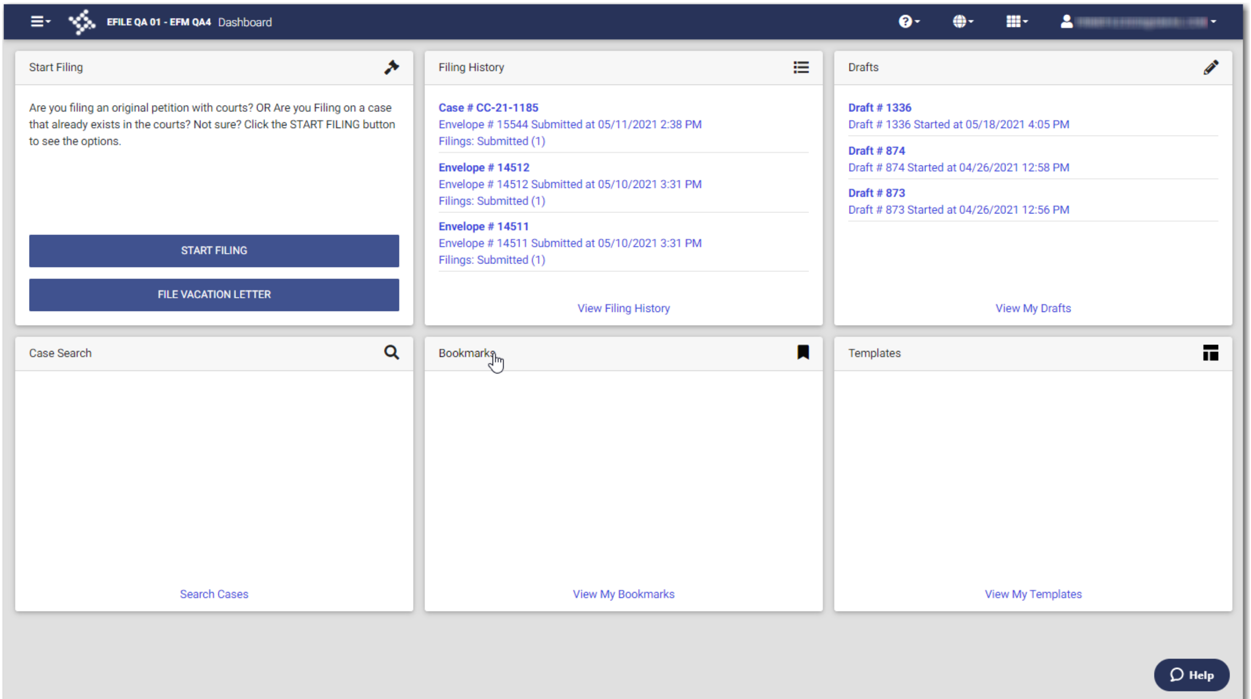
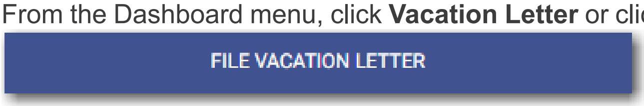



**Figure 16.4 – Dashboard Page**

To file a vacation letter:

1. From the Dashboard menu, click **Vacation Letter** or click  on the *Dashboard* page.

   The **Options** tab on the *File Vacation Letter* page is displayed.

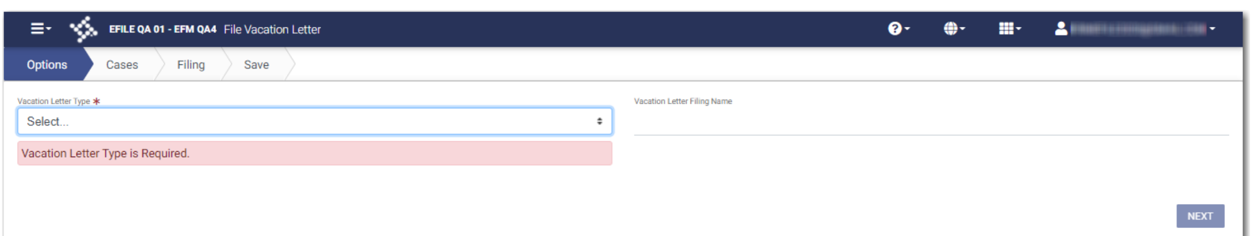



**Figure 16.5 – Options Tab on the File Vacation Letter Page**

2. From the **Vacation Letter Type** drop-down list, select the vacation letter type that you want.

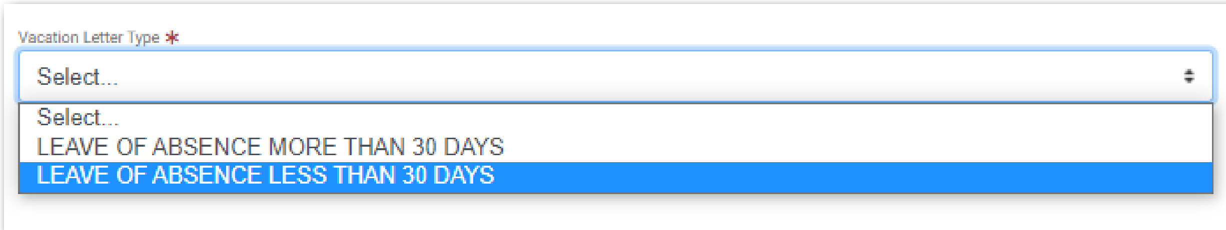



**Figure 16.6 – Sample Vacation Letter Type Drop-Down List**

3. Type a name for the vacation letter filing in the **Vacation Letter Filing Name** field.

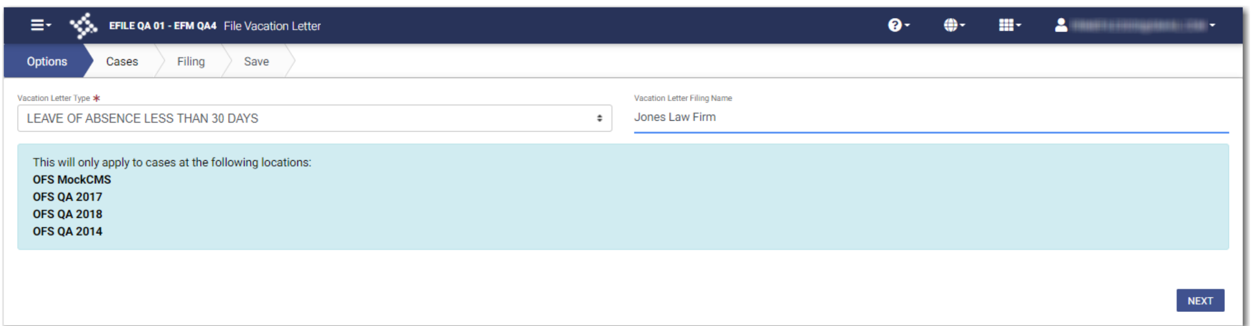



**Figure 16.7 – Sample Options Tab on the File Vacation Letter Page with Fields Completed**

4. Click NEXT.

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

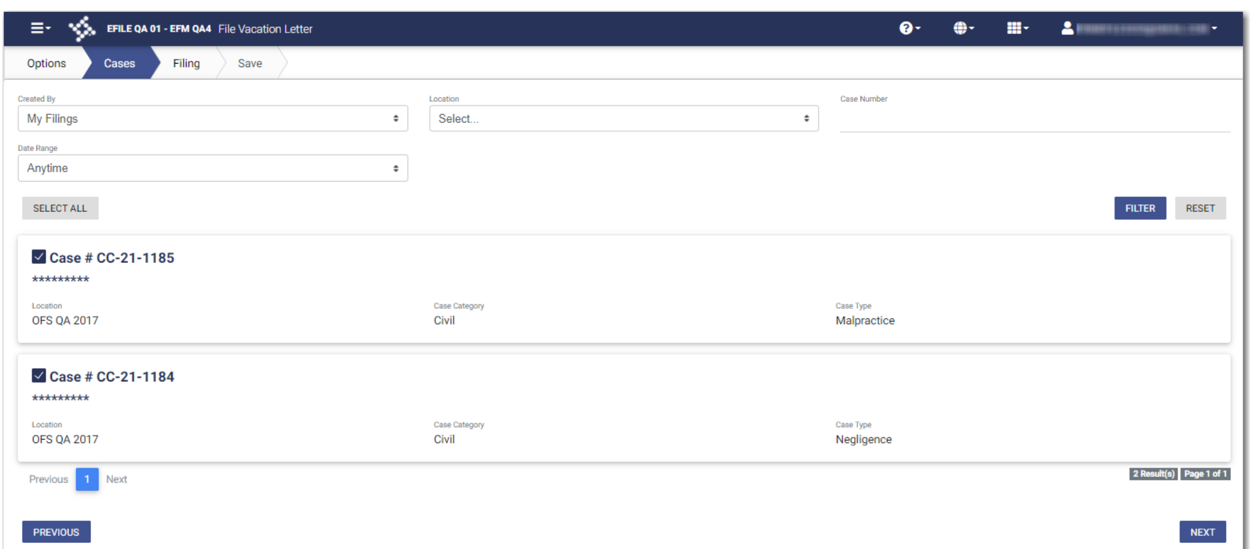



**Figure 16.8 – Sample Cases Tab on the File Vacation Letter Page**

5. If you do not want the vacation letter to be attached to a specified case, clear that case. If you later want to select all of your cases, click SELECT ALL.

**Note: If you have more cases than the cases displayed on the current page, you can filter particular cases to which you want the vacation letter attached. Complete the required fields, and then click FILTER.**

6. After you have completed or verified the information on the **Cases** tab, click NEXT.
7. On the **Filing** tab, select the filing type from the **Filing Type** drop-down list.

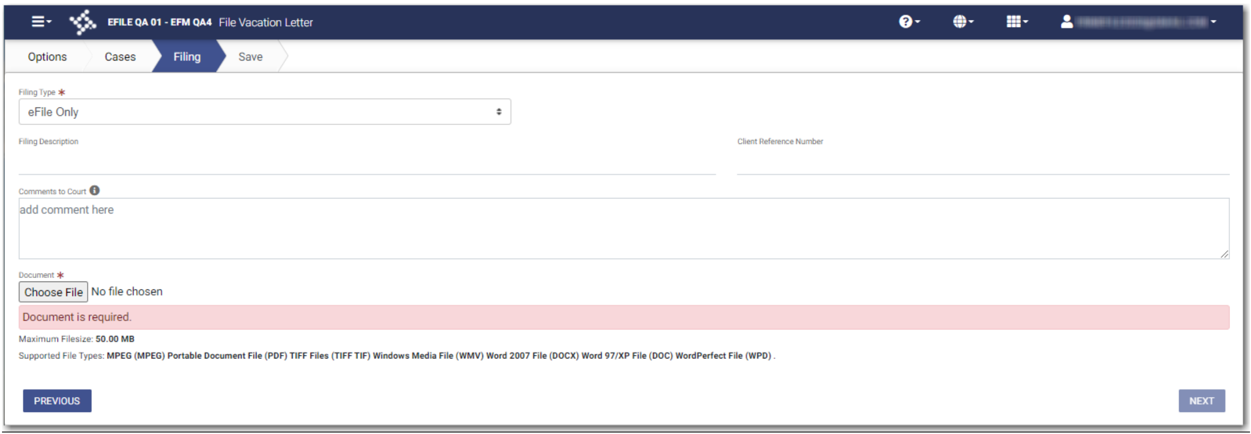



**Figure 16.9 – Filing Tab on the File Vacation Letter Page**

8. Click Choose File, and then upload the vacation letter document.
9. Click NEXT.

   The document that you uploaded is listed in the Filing pane, and your selected cases are listed in individual panes on the **Save** tab.

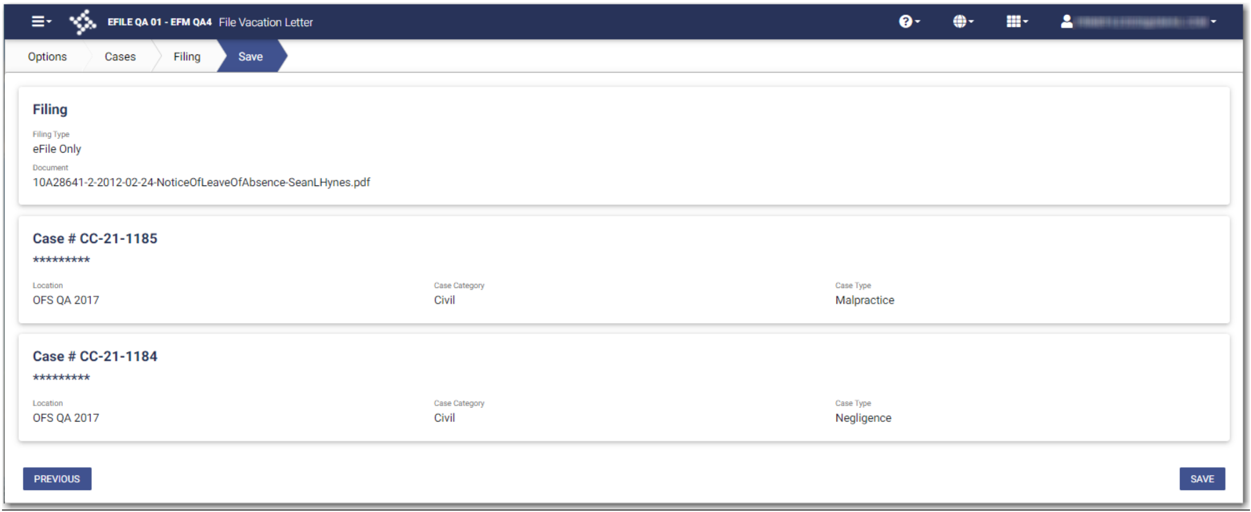



**Figure 16.10 – Save Tab on the File Vacation Letter Page**

10. Review the information that is displayed, and then click **SAVE**.

    The vacation letter filing is displayed on the *Bulk Filing Dashboard* page. The vacation letter filing includes the name that you assigned to the vacation letter filing, along with a newly assigned number for the vacation letter filing.

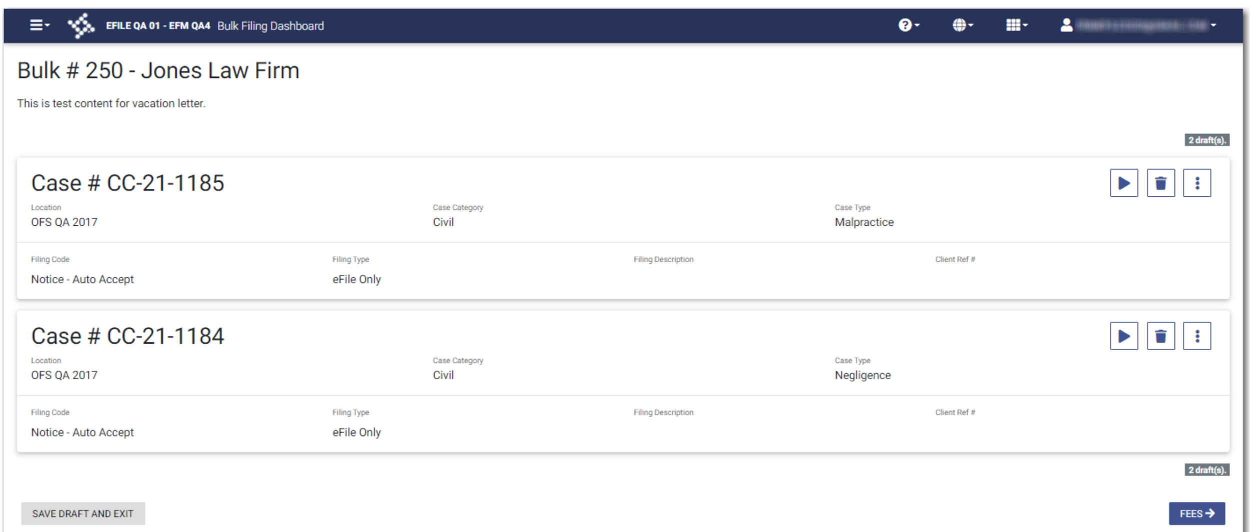



**Figure 16.11 – Sample Vacation Letter Filing on the Bulk Filing Dashboard Page**

11. Click **FEES →** to continue with your filing, or click **SAVE DRAFT AND EXIT** to save your filing and continue it at another time.

    If you did not complete your vacation letter filing, it will be displayed on the *Bulk Drafts* page. If you did complete your filing, it will be listed on the *Bulk History* page.

# Entering Payment Information for a Vacation Letter (or Leave of Absence) Filing

Enter the payment information for your vacation letter (or leave of absence) filing on the *Bulk Fees / Summary* page.

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

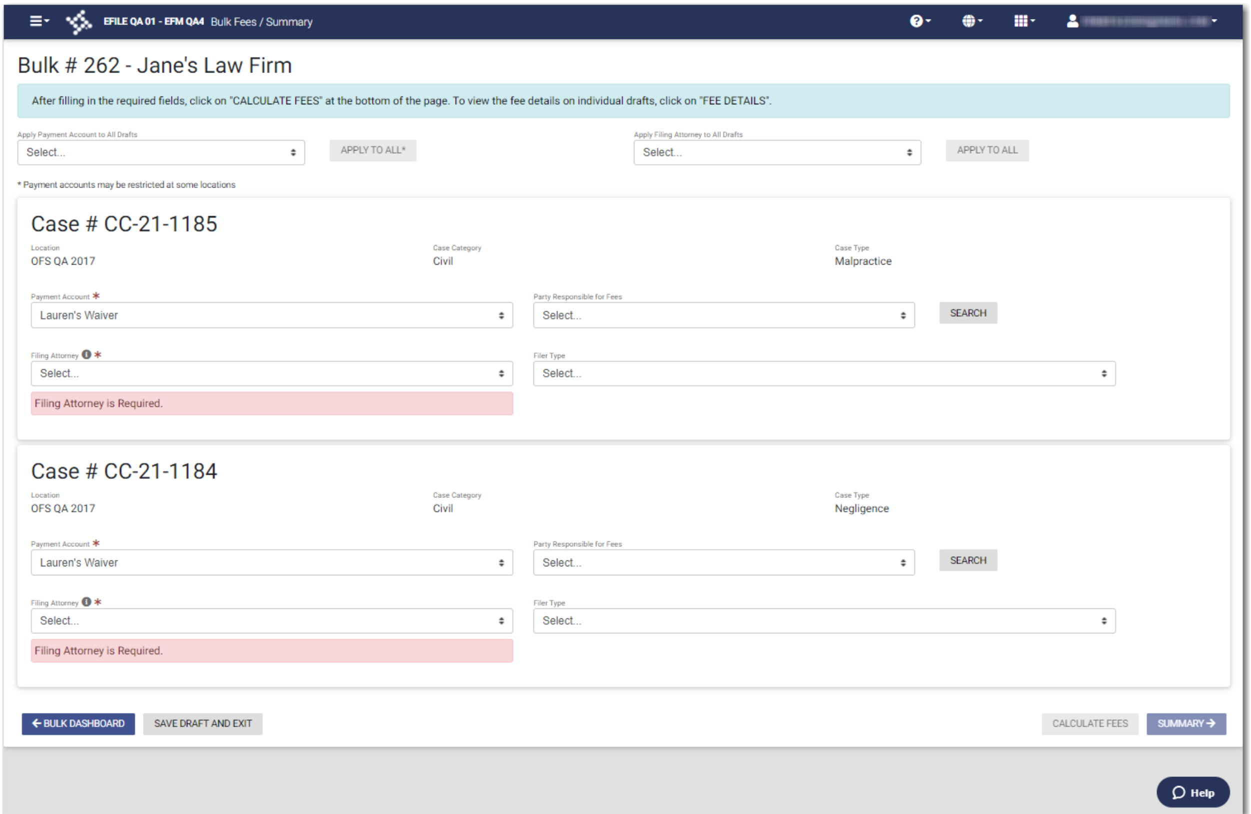



**Figure 16.12 – Sample Bulk Fees / Summary Page—Blank Fields**

To enter the payment information for your vacation letter filing:

**Note: If you do not want to apply the same payment account and filing attorney to all of the cases, you must select the payment account and the filing attorney for each individual case.**

1. Select the payment account from the **Apply Payment Account to All Drafts** drop-down list. Then, click APPLY TO ALL* to apply the selected payment account to all of the cases in the bulk.
2. Select the filing attorney from the **Apply Filing Attorney to All Drafts** drop-down list. Then, click APPLY TO ALL* to apply the selected filing attorney to all of the cases in the bulk.
3. For each case, 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.

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

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

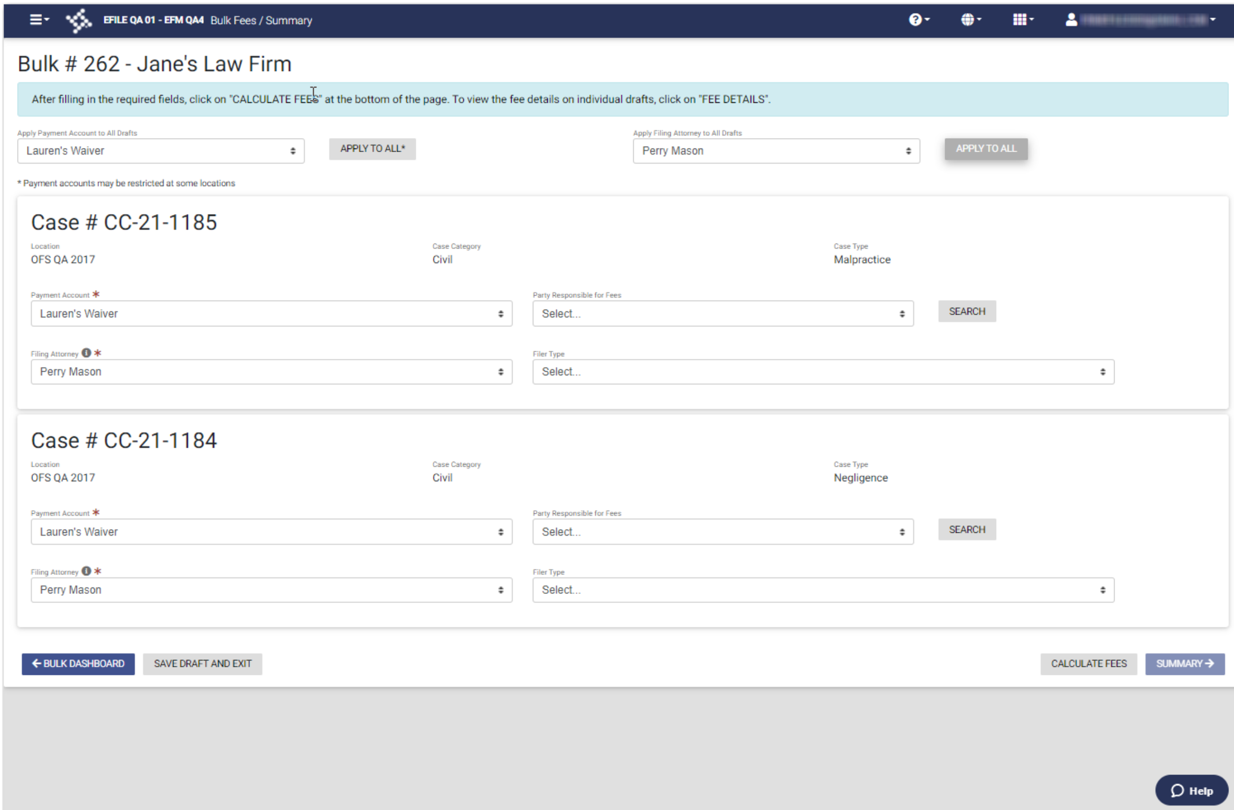
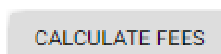



**Figure 16.13 – Sample Bulk Fees / Summary Page—Completed Fields**

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



The fee totals and the **Fee Details** button are displayed.

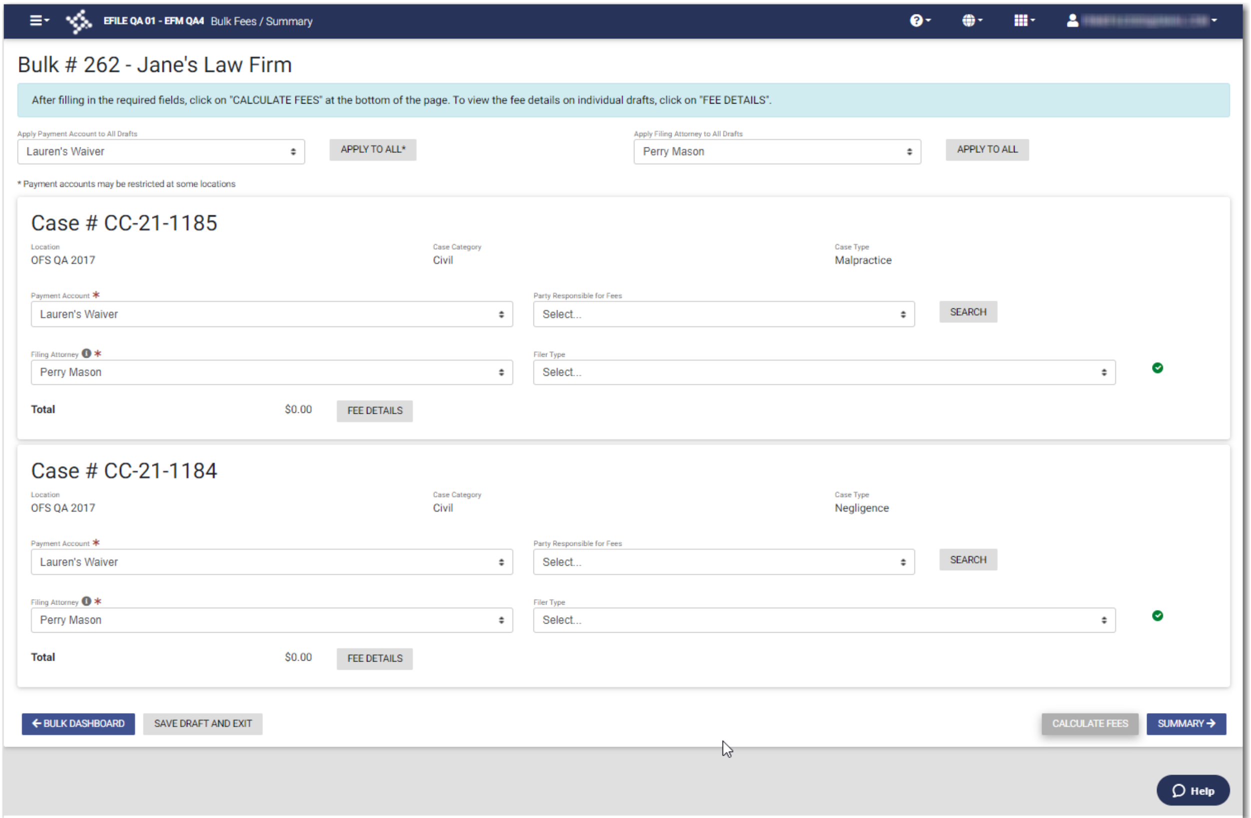



**Figure 16.14 – Fee Totals and Fee Details Button on the Bulk Fees / Summary Page**

6. Click FEE DETAILS.

   The *Fee Details* window is displayed.

7. Review the filing fees, and then click SUMMARY →.

# Viewing the Envelope Summary for a Vacation Letter (or Leave of Absence) Filing

The envelope summary provides a summary of your vacation letter (or leave of absence) filing, including the cases to which your letter will be attached, the location of the cases, the case category, and the case type.

To view the envelope summary for a vacation letter (or leave of absence) filing:

1. Complete the required information on the *File Vacation Letter* page (all tabs) and the *Bulk Fees / Summary* page.

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.

3. If there are submission agreements for your filing, select the appropriate check boxes for the submission agreements.
4. Review the summary of the vacation letter filing. After you are satisfied with the information in your filing, click **SUBMIT**.

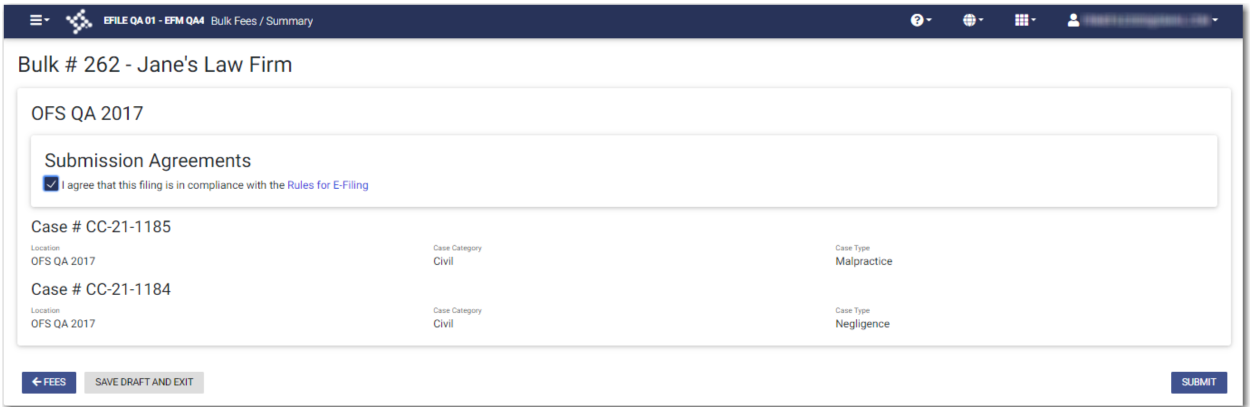



**Figure 16.15 – Sample Bulk Fees / Summary Page**

5. Click **BULK HISTORY** to return to the *Bulk History* page, or click **DASHBOARD** to return to the *Dashboard* page.

# 17 Reports

**Topics covered in this chapter**

♦ Creating a Report

You can generate a report that can be used to reconcile financial transactions for envelopes and filings that you 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.

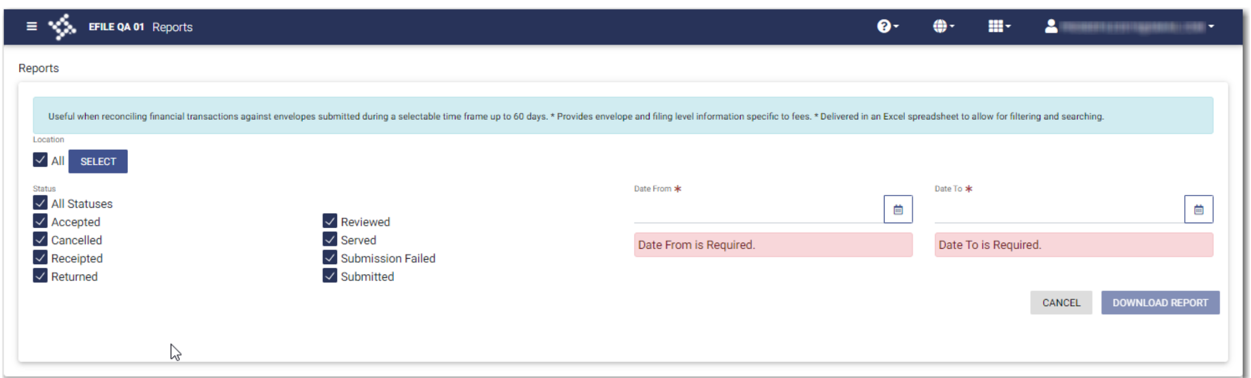



**Figure 17.1 – Reports Page**

2. Click 

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

   The *Select Locations* dialog box is displayed.

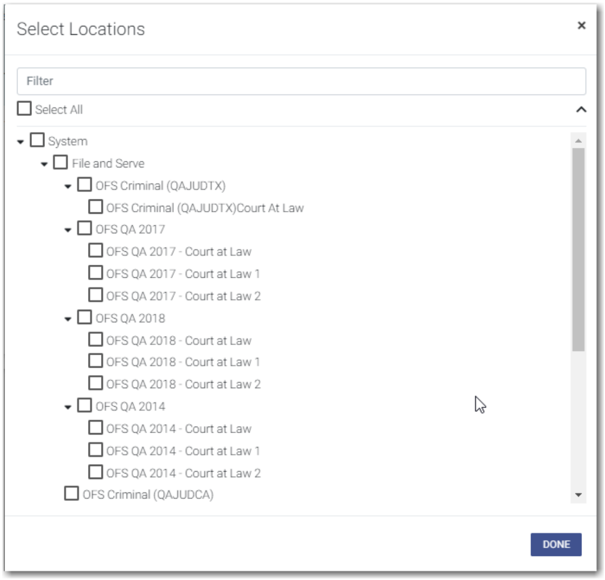
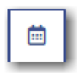



**Figure 17.2 – Select Locations Dialog Box**

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.**

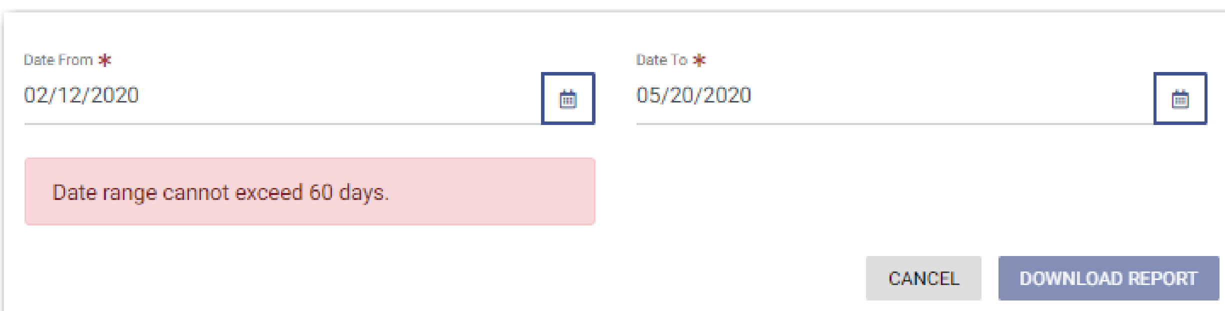



**Figure 17.3 – Error Message for Report Date Range**

6. Click 

.

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

# 18 Support and Feedback

**Topics covered in this chapter**



You can request technical support for the application, or you can provide feedback for the application.

## Requesting Support

You can request support from Tyler regarding the application.

To request support regarding the application:

1. Click  in the eFile header.

   The *Support / Feedback* window is displayed.

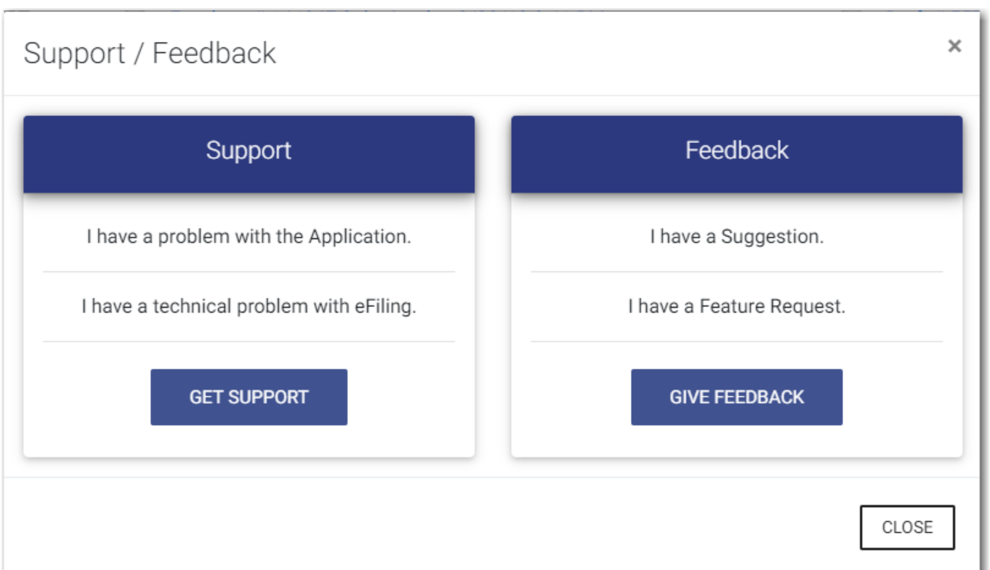



**Figure 18.1 – Support / Feedback Window**

2. Click 

.

   The *Support* window is displayed.

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

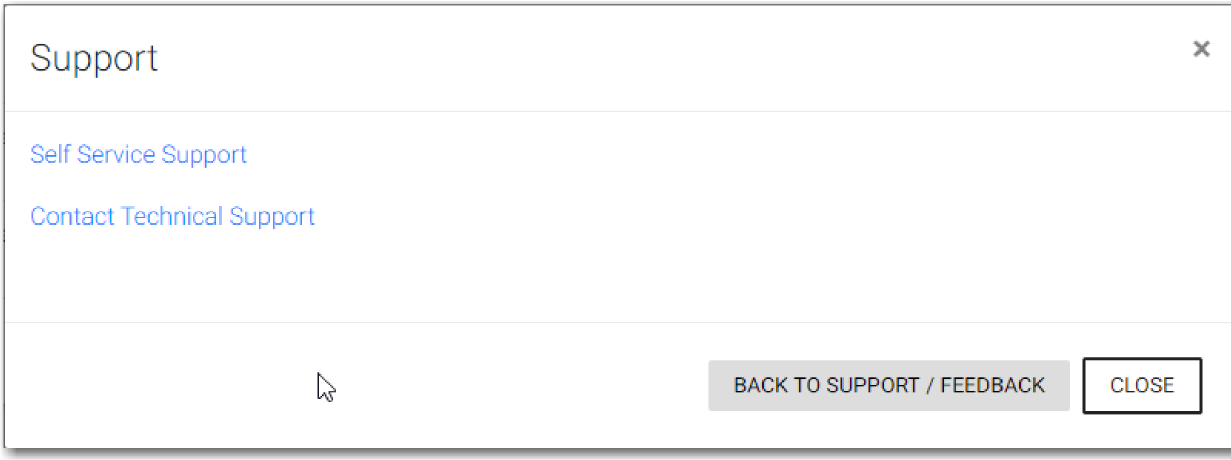



**Figure 18.2 – Example of a Support Window**

3. Click the support link that you want.

   The appropriate Tyler support page is displayed in a new tab, depending on the link that you clicked.

4. Either click **BACK TO SUPPORT / FEEDBACK**, or click **CLOSE**.

# Zendesk Support

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

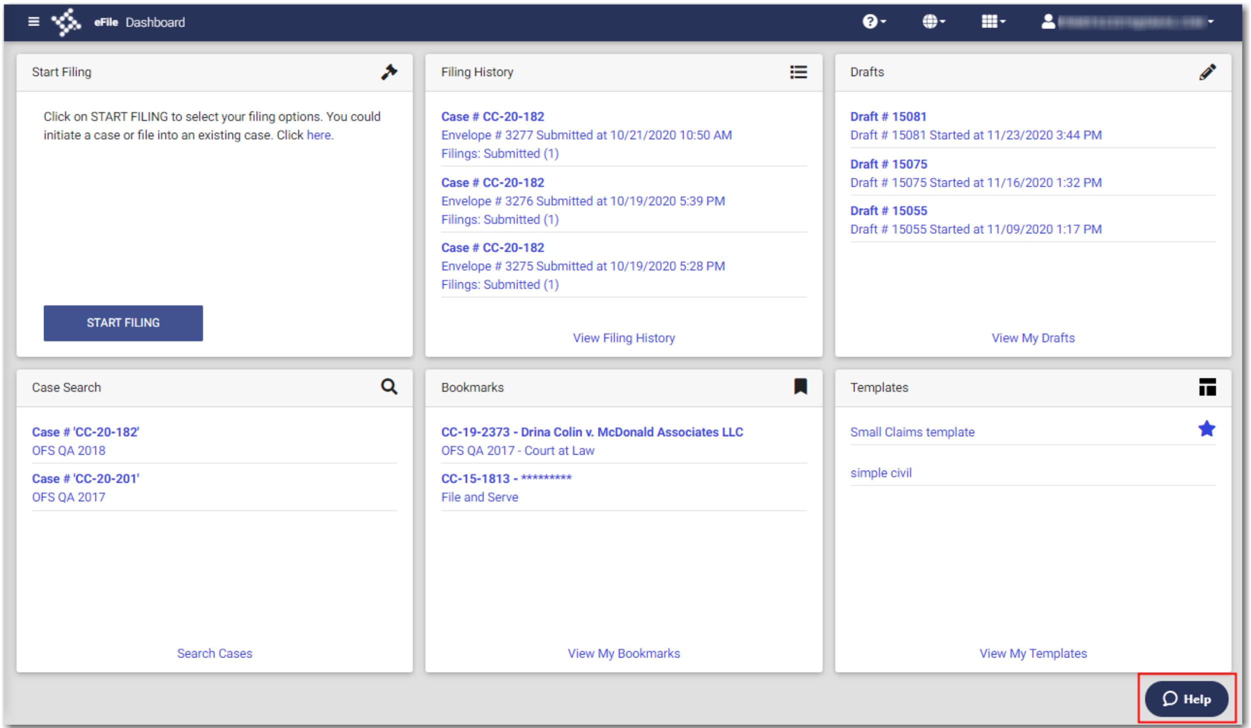



**Figure 18.3 – Help Icon on the Dashboard Page**

You can click the Help icon to open a chat modal.

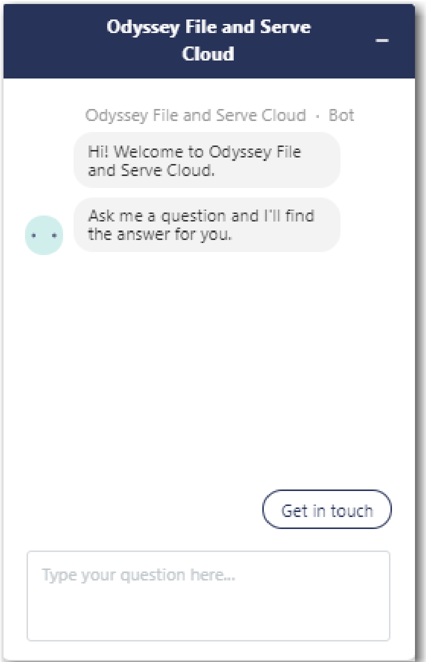



Figure 18.4 – Chat Modal

In the chat modal, click **Get in touch**. Options are displayed for the method by which you want to communicate with the Support representative.

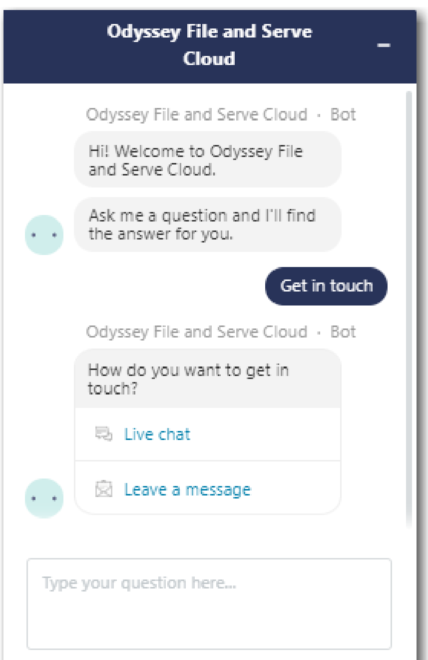



Figure 18.5 – Chat Modal with Communication Options

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.

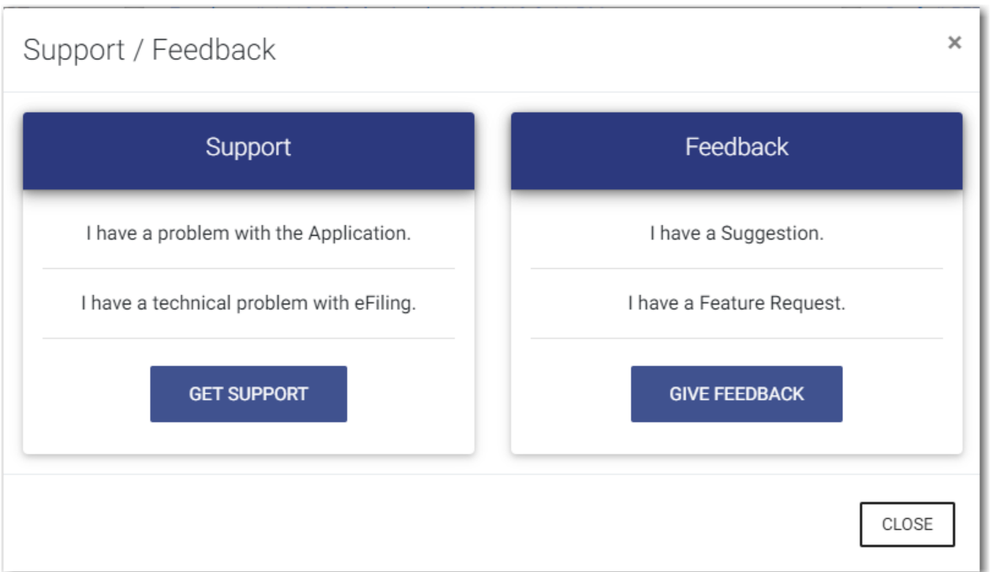
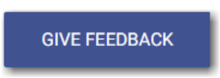



**Figure 18.6 – Support / Feedback Window**

2. Click 

.

   The *Feedback* window is displayed.

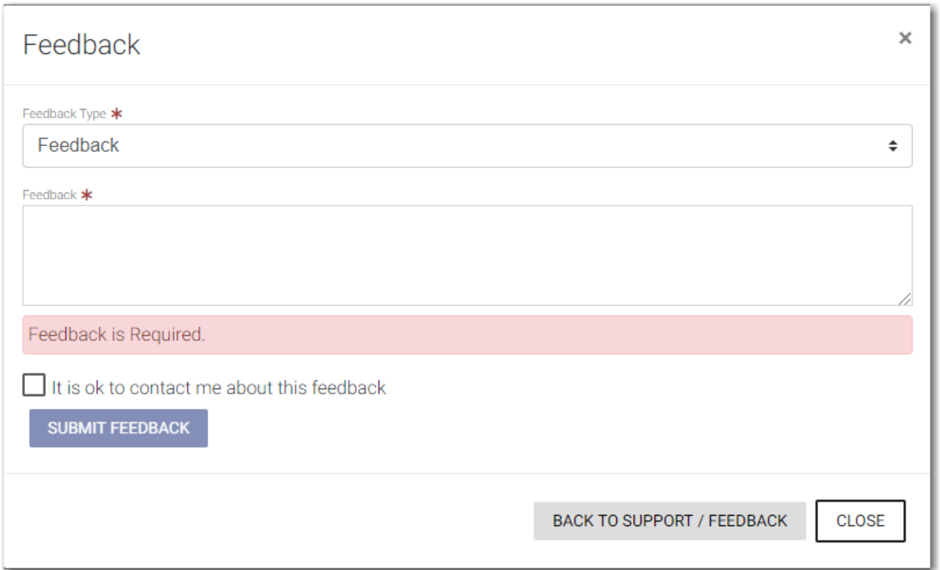



**Figure 18.7 – Feedback Window**

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

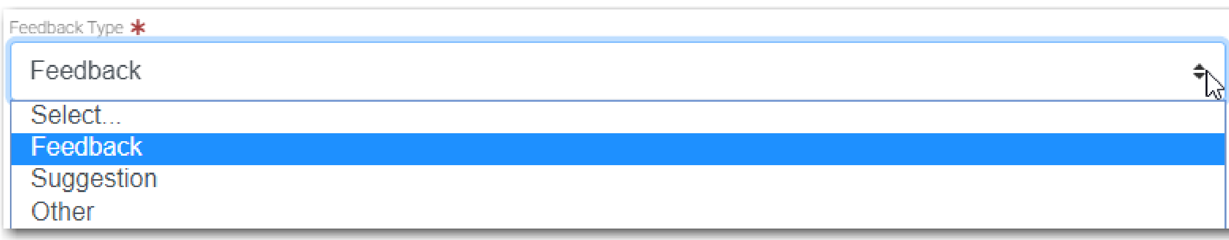



**Figure 18.8 – Feedback Type Drop-Down List**

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.
6. Click SUBMIT FEEDBACK.
7. Either click BACK TO SUPPORT / FEEDBACK, or click CLOSE.

# 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. |