

# Individual Filer User Guide Odyssey<sup>®</sup> File & Serve<sup>™</sup> 2021.6

October 2021

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# Publishing History

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

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

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

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

Document Publication Number	Revision	Date	Changes Made
	Twelfth	July 2021	<ul> <li>The following changes were made:</li> <li>Added the vacation letter (or leave of absence) feature</li> <li>Added the capability to collect additional data on the <i>Case Information</i> page. The data that is collected is then transferred to forms used in civil and family cases.</li> <li>Added the Service of Process feature. The data</li> </ul>
ESO-FS-200-4494 v.13	Thirteenth	October 2021	<ul> <li>that is collected is then transferred to forms used in civil and family cases.</li> <li>Updated the case search sections to include the use of the ENTER button for case searches</li> <li>The following changes were made:</li> </ul>
			<ul> <li>The <i>Fees</i> page has been updated to allow filers to create payment accounts on the <i>Fees</i> page during filing creation.</li> <li>The <b>Documents</b> tab has been changed to the <b>Preload Documents</b> tab.</li> </ul>
			<ul> <li>The Upload Documents tab.</li> <li>The Upload Documents pane on the <i>Filings</i> page has been changed to the Documents pane. The Add Documents button in the Documents pane has been changed to the Select Documents button.</li> </ul>
			• The Envelope Submitting window has been added at the end of the filing process. After filers click the <b>Submit</b> button, the Envelope Submitting window is displayed with three options for the filer's next step. The options include: return to the Dashboard page, view the receipt, or start a new envelope.

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## About This Guide

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

User guides may include the following elements:

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

#### Audience

This document is intended for the following personas:

- Clients
- Tyler Client Services

#### **Documentation Conventions**

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

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

#### **Documentation Notes**

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

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

# 1 System Overview

#### Topics covered in this chapter

- ◆ Release 2021.6 Enhancements
- ♦ Before You Begin

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

## Release 2021.6 Enhancements

The following enhancements were made to the Odyssey<sup>®</sup> File & Serve<sup>™</sup> system for Release 2021.6.

Feature/Update	Description/Location in Document		
The <i>Fees</i> page has been updated to allow filers to create payment accounts on the <i>Fees</i> page during filing creation.	Entering Payment Information, page 92		
The <b>Documents</b> tab has been changed to the <b>Preload Documents</b> tab.	Updated screen shots of the <b>Preload Documents</b> tab are included throughout the document.		
The Upload Documents pane on the <i>Filings</i> page has been changed to the Documents pane. The <b>Add Documents</b> button in the Documents pane has been changed to the <b>Select Documents</b> button.	Updated screen shots of the Documents pane and the <b>Select Documents</b> button are included throughout the document.		
The <i>Envelope Submitting</i> window has been added at the end of the filing process. After filers click the <b>Submit</b> button, the <i>Envelope Submitting</i> window is displayed with three options for the filer's next step. The options include: return to the <i>Dashboard</i> page, view the receipt, or start a new envelope.	<ul> <li>The following topics were updated:</li> <li>Viewing the Envelope Summary, page 98</li> <li>Viewing Case Address Information on the Summary Page, page 102</li> <li>Viewing the Envelope Summary for Service of Process Cases, page 117</li> </ul>		

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

## **Page Navigation**

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

#### Using the Mouse

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

#### Using the Keyboard

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

## **Error Messages**

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

#### Enter Data in Required Fields

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

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

### Orientation

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

#### Dashboard Page

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

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

Figure 1.1 – Dashboard Page

#### **Case Search**

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

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

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

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

File into Existing Case	×	
Location *		
Location is Required.	$\mathbf{\cap}$	
Case number format is default.	<b>U</b>	
Case Number 🗚		
Case Number is Required.		
gure 1.3 – File into Existing Case V	CANCEL SEARCH	

У ıy

If your search does not produce any results, click	← DASHBOARD	to return to the	e Da	shbo	ard page.
≡ 🤸 •File Case Search		0.	•-	<b></b> -	
← DASHBOARD					REFINE SEARCH



#### **Filing History**

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

= 🐝 eFile Filing History					Q- (	)• III•	
Filing History Filter		G DRAFTS					2 Result(s) Page 1 of 1
Status	Envelope # 1 Envelope # 165244 Submitted						
All Statuses     Accepted     Cancelled	Filing Status Submitted	Filing Code Acquittal	Filing Type eFile Only	Filing Description		Client Ref #	8
O Receipted O Served O Returned	Envelope # 1	165149					
O Submitted O Submitting	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
Any Location +	Reviewed Previous 1 Next	Acknowledgement	eFile Only				2 Result(s) Page 1 of 1
Case Number / Envelope Number							
Case Number							
Envelope Number							
Date Range							ß
Anytime     Last Month     Last Week     Last Week     Last Two Days     Today     Pick a Custom Range     From Date							
To Date							

Figure 1.5 – Filing History Page

#### **Filing Drafts**

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

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

Figure 1.6 – Filing Drafts Page

#### Bookmarks

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

= 🐝 eFile Bookmarks				0-	<b>.</b>	<b></b> -	A
Bookmark Filter							4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description				
Any Location ¢ Case Number	Case # CC-19-2373	Location OFS QA 2017 - Court at Law	Case Description Drina Colin v. McDonald Associates LLC				r 🗈 🗄
Case Number Case Description	Case # CC-19-3477	Location OFS QA 2017	Case Description				
Case Description           RESET         FILTER	Case # CC-19-438	Location OFS QA 2018	Case Description				
	Previous 1 Next		l≽				4 Results Page 1 of 1

Figure 1.7 – Sample Bookmarks Page

#### Templates

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

≡ 🐝 eFile Templates			<b>0</b> - ⊕- <b>Ⅲ</b> - <b>೭</b>
Filter Type My Templates	Name ¢	FILTER RESET	ADD TEMPLATE
Favorite	Name	Туре	Actions
*	Tyler Group	New Case	A 1
☆	My Name change template	New Case	
☆	Existing Case Template	Existing Case	A .
☆	Template #5	New Case	
☆	Thursday Template	New Case	
☆	Pro Se Template	New Case	
☆	Thursday Template #2	New Case	
☆	Current Case Template #2	Existing Case	
☆	Template #3	New Case	

Figure 1.8 – Templates Page

#### **My Payment Accounts**

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

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

Figure 1.9 – Payment Accounts Page

#### **My Service Contacts**

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

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



#### **My Information**

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

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

#### Figure 1.11 – My Information Page

#### **Account Settings**

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

≡ 🐝 eFile Account Settings		<b>?</b> -	<b>.</b>	<b></b> -	A PROBERTIC CONTRACTOR -
Old Password \star					
Old Password is Required.					
New Password 🗱	Re-enter New Password				
New Password is Required.					
Password must be 8 characters long and include numbers, s	pecial characters and at least one capital letter.				
					SAVE

Figure 1.12 – Account Settings Page

#### Reports

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

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

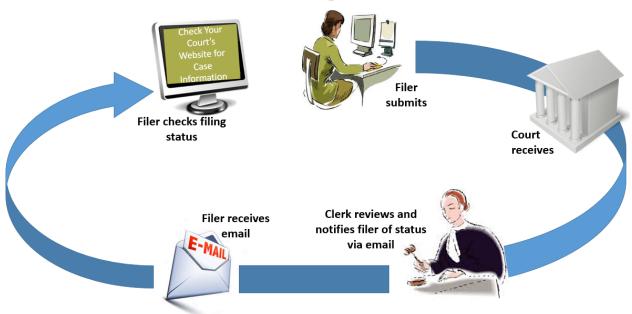
Figure 1.13 – Reports Page

# **2** E-Filing Overview

#### Topics covered in this chapter

#### Filing Queue Status

This section describes the e-filing process.



## The E-Filing Process

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

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

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

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

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

## Filing Queue Status

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

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

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

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

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



#### Topics covered in this chapter

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

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



Figure 3.1 – eFile Landing Page

## Registering as an Individual Filer

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

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

To register as an individual filer:

1. On the *Landing* page, click

The Registration - Select Type page is displayed.

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



Figure 3.2 – Registration – Select Type Page

INDIVIDUAL 2. Click

The Registration - User Information page is displayed.

■ Sefile Registration - User Information				<b>?</b> -	<b>.</b> -	<b></b> -	ANONYMOUS -
Select Type User Information Contact Information							
First Name *	Middle Name		Last Name ≭				
First Name is Required.			Last Name is Required.				
Email Address *		Confirm Email Address *					
Email Address is Required.		Confirm Email Address is Required.					
Password *		Confirm Password \star					
Password is Required.		Confirm Password is Required.					
RESELECT TYPE							NEXT

NEXT

Figure 3.3 – Registration - User Information Page

3. Complete the required fields, and then click

The Registration - Firm/Contact Information page is displayed.

4. Complete the address and phone number fields.

E 🌾 eFile Registration - Firm/Contact Information				<b>?</b> -	<b>.</b>	<b></b> -	ANONYMOUS -
Select Type User Information Contact Information							
Country United States • Address Line 1 *		Address Line 2					
Address Line 1 is Required.	State *		Zip Code ¥				
cny * City is Required.	State is Required.	\$	Zip Code is Required.				
Phone Number *							
Phone Number is Required.							
I agree to the Terms and Conditions							
You must accept the Terms and Conditions.							
USER INFORMATION							SUBMIT

Figure 3.4 – Registration - Firm/Contact Information Page

5. Select the l agree to the Terms and Conditions check box.

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

E 🤹 eFile Terms And Conditions	Ø-	•-	<b></b> -	ANONYMOUS -
File Usage Agreement Velocement to the online services of Tyler Technologies for <b>Qonos</b> . Please read this Agreement carefully. It governs Your access to and use of the Ddyssey File & Serve application through the Tyler Technologies In steand/or other Tyler products is conditioned upon Your accesshare of this Agreement. By clicking on the "I Accept" button, You are agreeing to be legally bound by all of the terms and conditions of this Agreement. By clicking on the "I Accept" button, You are agreeing to be legally bound by all of the terms and conditions of this Agreement will bind Your employer. Section 1. Definitions Section 2. License, Restrictions on Use Section 3. Access to the Tyler Internet Site Section 4. Initiations on Use Section 4. Findiations on Use Section 5. Fer Schedule Section 5. Proprietary Rights Section 6. Your Warranties and Limitations Section 8. Your Warranties and Initiations Section 9. Limitations of Liability Section 10. Arbitration Section 9. Limitations Section 9. Limit				
Section 11. Insistentiateous Section 12. Definitions The following terms have the following meanings in this Agreement: "Authorized User" means any of Your employees, agents, independent contractors or consultants who agree to be bound by the terms and con subhorized or otherwise designated or permitted by You to access and use the Tyler Services pursuant to the License. "E-Document" refers to any document or discrete compilation of text and/or graphical inform to the Odysey File & Serve program. "Enhancement" means any correction, modification, customization, revision, enhancement, improvement, update, upgrade, new release or other change that is released ger pervices. "Fee Schedule" means Tyler's current Fee Schedule for use of the Tyler Services as may be altered or amended from time to time by Tyler. "Information" means the records, data, databases, documents through the Tyler Services. "License" means the limited license granted to You under this Agreement. "Proprietary Rights" means any patent, copyright, trademark, service mark, trade secret or other intellectual Director, cords, data, documents, materials, or other information supplied to Tyler pursuant to an agreement with a third party for inclusion as part of, or for use with, the Tyler Services. "Tyler" means Tyler Tech Divisions. "Tyler Internet Site" means the Tyler Services. Tyler Services "means, Application and any related services made available to You and Authorized User from Tyler from time to time. "Tyler Technology" means any know-how, processes, methodologies, specifications, designs, fin- thedods, applications, computer programs, user manuals, on-lind occumentation, products or other technology and materials of any kind, or any Ethancement thereto, used by Tyler in connection with the perfor Tyler to You, any Authorized User or any third party through the Tyler Internet Site. "License." License: Restrictions on Use 2.1 License.	mation ii nerally b roperty nologie , collect ventions rmance hout lim	n electroni by Tyler Teo als, and ot right. 'Thir s, Inc. and ively, Tyler s, functiona of the Tyle itation, an	c form suit chnologies her informa d Party Con its operatir 's Odyssey ility, graphic er Services y bulk resel	able for submission for the Tyler tion accessible ttent" means any ig units and File & Serve s,s techniques, or made available by ling involving any
1.1 License. Subject to the restrictions and limitations set forth in this Section 2 and elsewhere in this Agreement, Tyler hereby grants to You a nonexclusive, nontransferable, limited license to do the following during the term Jeers to access and use the Tyler Services subject and according to the terms of this Agreement solely for Your internal use in the regular course of Your business; (b) subject to any applicable third party rights				

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

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



The Registration - Success page is displayed.

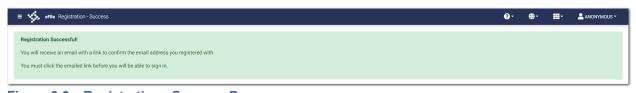


Figure 3.6 – Registration - Success Page

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

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

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

I FORGOT MY PASSWORD

## **Resetting Your Password**

To reset your password:

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

Reset Password

Email Address \*

Email Address is Required.

Im not a robot

reCAPTCHA

Privacy-Terms

CANCEL

RESET PASSWORD

The Reset Password window is displayed.

#### Figure 3.7 – Reset Password Window

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

VERIFY

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

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

4. Click the requested images, and then click

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

RESET PASSWORD

5. After selecting the correct images, click

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

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

Figure 3.8 – Reset Password Window – Complete Reset Process

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

Password Reset Request
A request to reset your password has been processed. If you did not request a password reset, take no action. Your account will be left unaltered.
To complete your password reset, click here to set your new password.
If the link above is not accessible, copy and paste the URL below into your web browser: https:// /ResetPassword.aspx?
Please do not reply to this email. It was generated automatically by <u>no-reply@tylerhost.net</u> >

Figure 3.9 – Example of Password Reset Request Email

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

You are prompted to create a new password.

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

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

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

A confirmation page displays the following message: Your <code>password</code> 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.

≡ 🐝 eFile Account Settings		<b>?</b> -	<b>.</b>	<b></b> -	L PROBETTI COLLUMN
Old Password *					
Old Password is Required.					
New Password *	Re-enter New Password				
New Password is Required.					
Password must be 8 characters long and include numbers, s	necial characters and at least one canital letter				
·					SAVE

#### Figure 3.10 – Account Settings Page

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

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

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



Your password is changed.

## **Updating User Information**

You can update your personal information.

To update your personal information:

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

The My Information page is displayed.

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

SAVE

Figure 3.11 – Sample My Information Page

2. Update any information as needed, and then click



#### Topics covered in this chapter

- ♦ Signing In
- Signing Out

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

## Signing In

Note: Click

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

### REGISTER

to register if you have not registered before.

To sign in to the application:

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

Sign	İn	×
\$	odyssey: identity provider a tyler courts & justice solution	
	Please sign in to continue	
	Email	
	Email	
	Password	
	Password	
	Sign In	
Forg	ot your password? RESET PASSWORD CLC	DSE

Figure 4.1 – Sign In Page



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

Sign Out

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

# Signing Out

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

To sign out of the application:

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



Figure 4.2 – Sign Out Drop-Down List

You are now signed out of the application.



### Topics covered in this chapter

#### Dashboard Page

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

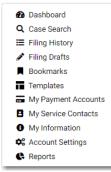


Figure 5.1 – Dashboard

From here, you can perform the following actions:

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

# Dashboard Page

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

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

Figure 5.2 – Dashboard Page

### Account Setup

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

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

Figure 5.3 – Warning Message

Start Filing

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

### **Filing History**

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

eFile Filing History					0- (	. ∎.	A monetti contigenesi. Con -
iling History Filter		DRAFTS					2 Result(s) Page 1 of
tatus	Envelope # 1						
All Statuses	Envelope # 165244 Submitted	J1/28/2020 3:53 PM by Pro Se					
Accepted	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
Cancelled	Submitted	Acquittal	eFile Only				×
) Receipted			,				
) Served	Envelope # 1	65149					
) Returned	Envelope # 165149 Submitted						
) Submitted ) Submitting	Envelope # 103149 Submitted	51) 24/2020 9.22 AM by PI0 Se					
Submitting	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
cation	Reviewed	Acknowledgement	eFile Only				
ase Number / Envelope Number se Number velope Number	_						
ate Range							۵.
Anytime							
Last Month							
) Last Week							
Last Two Days							
) Today ) Pick a Custom Range							
rom Date 🗎							
o Date 🗎							

Figure 5.4 – Filing History Page

#### Drafts

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

≡ 🐝 eFile Filing Drafts					<b>?</b> -		• ••••••••••••••••••••••••••••••••••••
Filing Drafts Filter	FILING HISTORY FILING	DRAFTS					66 Results Page 1 of 4
Location	Draft # 6666 Draft # 6666 Started 10/24/19 3:	31 PM by Pro Se					
Any Location \$	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
Case Number / Draft Number	Draft	Acknowledgement	eFile Only	Acknowledgement		Chain Ner #	
Case Number	Draft # 6659						► <b>Î</b> :
Draft Number	Draft # 6659 Started 10/23/19 4:	56 PM by Pro Se					
Date Range	Draft # 6658 Draft # 6658 Started 10/23/19 4:	21 PM by unknown					
<ul> <li>Anytime</li> <li>Last Month</li> </ul>	Draft # 5593						► <b>Î</b> :
O Last Week O Last Two Days O Today	Draft # 5593 Started 10/11/19 8: Draft # 5592	14 AM by Pro Se					
O Pick a Custom Range	Draft # 5592 Started 10/10/19 9:	13 PM by Pro Se					
From Date	Draft # 5587	59 PM by Pro Se					
To Date	Filing Status Draft	Filing Code	Filing Type eFile Only	Filing Description		Client Ref #	
RESET FILTER	Draft # 5560						
	Draft # 5560 Started 10/8/19 1:4	9 PM by Pro Se					
	Draft # 5557						

Figure 5.5 – Filing Drafts Page

#### **Case Search**

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

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

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

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

×	
CANCEL SEARCH	
	Q

Flie into Existing Case window--Excludes Party Name Option rigule 5.7

If your search does not produce any results, click	← DASHBOARD	to return to the	e Da	shbo	ard page.
≡ 🎪 •File Case Search		Q-	<b>.</b>	<b></b> -	
← DASHBOARD					REFINE SEARCH



### **Bookmarks**

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

= 🐝 eFile Bookmarks				<b>?</b> -	••	<b></b> -	• ************************************
Bookmark Filter							4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description				
Any Location	Cape#	Location	Case Description				
Case Number	CC-19-2373	OFS QA 2017 - Court at Law	Drina Colin v. McDonald Associates LLC				
Case Number	Cape #	Location	Case Description				
Case Description	CC-19-3477	OFS QA 2017					
Case Description	Case #	Location	Case Description				
RESET FILTER	CC-19-438	OFS QA 2018					
	Previous 1 Next						4 Results Page 1 of 1
			₿.				

Figure 5.9 – Sample Bookmarks Page

### Templates

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

≡ 🐝 eFile Templates			<b>∂</b> - ⊕- <b>Ⅲ</b> - <b>≗</b>
Filter Type My Templates	Name ¢	FILTER RESET	ADD TEMPLATE
Favorite	Name	Туре	Actions
*	Tyler Group	New Case	
☆	My Name change template	New Case	
☆	Existing Case Template	Existing Case	A :
☆	Template #5	New Case	
☆	Thursday Template	New Case	
슙	Pro Se Template	New Case	
슙	Thursday Template #2	New Case	
☆	Current Case Template #2	Existing Case	
☆	Template #3	New Case	

Figure 5.10 – Templates Page

# 6 Payment Accounts

### Topics covered in this chapter

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

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

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

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

To set up a payment account during a filing, select the **Create New Payment Account** option on the *Fees* page. Then, follow the steps to create the payment account.

# Adding a Waiver Payment Account

To set up a waiver payment account:

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

The Payment Accounts page is displayed.

E 🐝 eFile Payment Accounts				<b>?</b> ~	۰.	•	L montre con regionale con •
Account Name	Account Type Select	Account Status     Select	FILTER RESET				
Payment Account Name	Payment Account Type	Status	Last 4 Digits				Actions
Mary Ann's Waiver	Waiver	Active					/
Previous 1 Next							1 Result Page 1 of 1

Figure 6.1 – Payment Accounts Page



A new pane is displayed.

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

CREATE WAIVER

Figure 6.2 – New Payment Account Window

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

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

# Adding a Credit Card Payment Account

To set up a credit card payment account:

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

The Payment Accounts page is displayed.

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

Figure 6.3 – Payment Accounts Page



A new pane is displayed.

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

Figure 6.4 – New Payment Account Window

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

ENTER INFORMATION

The Enter Information window is displayed.

Enter Info	rmation			×
🔆 ty	<b>er</b> chnologies	VII	HU )	
Paymen	t Information			
	Method of Payment Credit Card e-Check			

Figure 6.5 – Enter Information Window

5. Select the Credit Card option.

The Payment Information pane is displayed.

	rmation	×
🔆 ty	chnologies	
Paymen	t Information	
	Method of Payment © Credit Card © e-Check	
	Cardholder Information Enter the information as it a asterisk (*) are required field	ppears on the Cardholder Account. The fields marked with a red ds.
	Card Type	*
	Card Number	*
	Exp Month	MM * Exp Year YYYY *
	CVV Code	* CVV Help
		*
	Name on Card	Maximum of 30 characters
	Address Type	● US O Foreign
	Address Line 1	Street address, P.O. box, company name, c/o
	Address Line 2	Apartment, suite, unit, building, floor, etc.
	City	*
	State	
	Zip Code	•
	Lip code	
		Continue

Figure 6.6 – Payment Information Pane

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

Continue

13. After completing all of the required fields, click

The Verify Billing Information pane is displayed.

🔅 ty	ler	
Verify B	Billing Information	
		MASTERCARD
		************5454
	Exp Date	02/20
	CVV Code	***
	Name on Card	Joe Smith
	Address Type	
	Address Line 1	123 Main St.
	Address Line 2	
	City State	Plano
	Zip Code	
	Terms and Conditions This is a confidential and secure site that doe third parties. By setting up this account you a conditions.	
		Back Save Information

Figure 6.7 – Verify Billing Information Pane

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

click and make any necessary changes.

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

# Adding an E-Check Payment Account

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

To set up an e-check payment account:

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

The Payment Accounts page is displayed.

■ Serile Payment Accounts			Ø- #·	· · · ·
Account Name	Account Type Select	Account Status	• FILTER RESET	
Payment Account Name	Payment Account Type	Status	Last 4 Digits	Actions
Mary Ann's Waiver	Waiver	Active		1
Previous 1 Next	C₂			1 Result Page 1 of

Figure 6.8 – Payment Accounts Page



A new pane is displayed.

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

### Figure 6.9 – New Payment Account Window

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

The Enter Information window is displayed.

ENTER INFORMATION

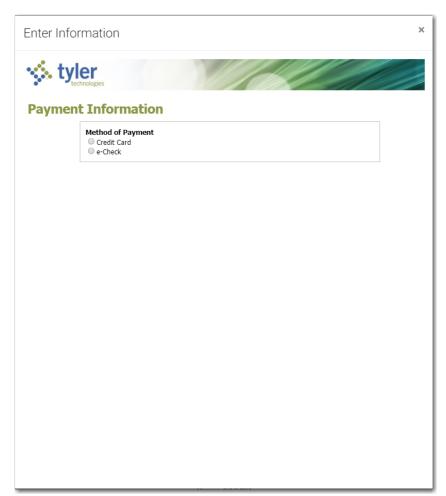


Figure 6.10 – Enter Information Window

5. Select the e-Check option.

The Payment Information pane is displayed.

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

Figure 6.11 – Payment Information Pane

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

Continue

11. After completing all of the required fields, click

The Verify Billing Information pane is displayed.

Enter Info	rmation		×
🔆 ty	ler chnologies		
Verify B	illing Information		
	Billing Detail Account Type Account Number Routing Number Name on Account Address Type Address Line 1 Address Line 2 City State Zip Code Terms and Conditions This is a confidential and secure site that does not third parties. By setting up this account you agree conditions.	****5678 113000023 Joe Smith US 123 Main St. Plano TX 75024 disseminate confidential information to	

Figure 6.12 – Verify Billing Information Pane

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

click and make any necessary changes.

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

### **Editing a Payment Account**

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

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

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

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

The Payment Accounts page is displayed.

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

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

Figure 6.13 – Payment Accounts Page

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

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

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

type the new name. Then, click

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

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

SAVE Then, click

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

# **Deleting a Payment Account**

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

To delete an existing payment account:

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

The Payment Accounts page is displayed.

= 🐝 eFile Payment Accounts				<b>?</b> -	<b>.</b>	<b></b> .	A monerour and a solution -
Account Name	Account Type Select	¢	÷ FILTER RESET				
Payment Account Name	Payment Account Type	Status	Last 4 Digits				Actions
Mary Ann's Waiver	Waiver	Active					1
Previous 1 Next							1 Result Page 1 of 1



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

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



# 7 Case Initiation

### Topics covered in this chapter

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

START FILING

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

Note: While you are entering a case filing, click

to view the case number or draft number.

= 🎪 eFile Dashboard		<b>0</b> - ⊕- Ⅲ- <b>≜</b>
Start Filing	Filing History	Drafts
Click on START FILING to select your filing options. You could initiate a case or file into an existing case.	Envelope # 165149 Envelope # 165149 Submitted at 01/24/2020 9:22 AM Filings: Submitted (1)	Draft # 9063 Draft # 9063 Started at 01/22/2020 3:55 PM Draft # 9062
	Envelope # 745447 Envelope # 745447 Submitted at 12/16/2019 4:54 PM Filings: Submitted (1)	Draft # 9062 Draft # 9062 Started at 01/22/2020 3:54 PM Draft # 9060 Draft # 9060 Started at 01/22/2020 1:42 PM
	Case # cc-15-1813 Envelope # 157230 Submitted at 11/05/2019 9:06 PM Filings: Accepted (1)	Unit # 9000 States at 017222222 1:42 PW
START FILING	View Filing History	View My Drafts
Case Search Q	Bookmarks	Templates
	<b>CC-15-1813 - ********</b> OFS QA 2017	
	CC-19-3942 - b b v. a a OFS QA 2017 - Court at Law	
	CC-15-230 File and Serve	
Search Cases	View My Bookmarks	View My Templates

START FILING

Figure 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.

= 🎪 FFILE QA 01 Start Filing	<b>?</b> -	<b>-</b>	<b></b> -	L
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loaton * Select •				
Location is Required.				
←DASHBOARD				
2				
νγ				
				() Help

Figure 7.2 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

E Y EFILE QA 01 Start Filing	<b>⊙</b> • ⊕• Ⅲ• <b>≜</b>
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Loodon * OFS MockCMS •	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHBOARD	
6	
	<b>р</b> нер
Eigure 7.2 Stort Filing Page with Coop Paper Di	anlavad

Figure 7.3 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Preload Documents page is displayed.

# Uploading Documents for a New Case Filing

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

To upload your documents:

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

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

Drag files here or
 BROWSE

1	Aaximum Filesize: 50.00 MB
5	supported File Types: MPEG (MPEG) Portable Document File (PDF) TIFF Files (TIFF TIF) Windows Media File (WMV) Word 2007 File (DOCX) Word 97/XP File (DOC) WordPerfect File (WPD) XML Document (XML).



### Figure 7.4 – Preload Documents Page

2. Select each document to be uploaded.

CASE INFORMATION ->

3. Click to continue with your filing.

The Case Information page is displayed.

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

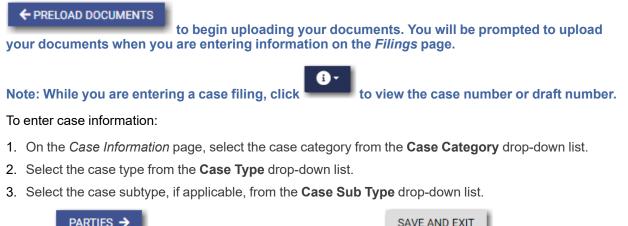
# **Entering Case Information**

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

Ξ· 🐝 EFILE QA 01 - EFM QA4 Case Information - Draft # 4279 ①·	<b>0</b> ∙ ⊕• <b>Ⅲ• ≜</b>
Preload Documents         Case         Parties         Filings         Service         Fees         Summary	
This is test content on case info page for firms.	
Location * OFS QA 2017 X *	Case Category * Select ~
	Case Category is Required.
Case Type *	
Select 👻	
Case Type is Required.	
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT	parties <del>)</del>

Figure 7.5 – Case Information Page

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



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

# **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.

d Documents Caso Parties Filings Service Fees Summary	X -	Case Category #				
* 0A 2017	X *					
QA 2017	× ~					
	× -	Civil				
*						× •
e <b>*</b>						
ce Of Removal	× -					
es / Ramedies		Damage Amount				
ECT		Select				:
e Address						
try *						
nited States +						
est Line 1 *						
dress Line 1 is Required.						
* State *				Zip Code 🕷		
Select			٠			
y is Required. State is Required.				Zip Code is Required.		
ty <b>*</b>						
unty is Required.						
ing is required.						
ELOAD DOCIMENTS SAVE DRAFT AND EXIT						PARTIES -

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

#### PRELOAD DOCUMENTS

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

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



to view the case number or draft number.

To collect address information at the case level:

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

=- 🐝 EFILE QA 01 - EFM QA1 Case Information - Draft # 4333 💿 -			ଡ	 <b></b> -	
Preload Documents Case Parties Filings Service Fees	Summary				
This is test content on case info page for firms.					
Location *		Case Category *			
OFS QA 2017	X <del>-</del>	Civil			× *
Case Type 🗶					
Notice Of Removal	× -				
Procedures / Remedies		Damage Amount			
SELECT		Select			\$
Case Address					
Country *					
United States ¢					
Address Line 1 *					
555 Main Street					
City *	State *		Zip Code ¥		
Dallas	Texas	\$	75220		
County * Dallas					
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT					PARTIES ->
CALE DISC PARE EXT					PARTES

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

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

## **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

PRELOAD 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.

Preload Documents Case Parties Filings Service Fees	Summary	
This is test content on case info page for firms.		
Location * OFS QA 2017	Ceie Category * Civil x	-
Case Type <b>*</b> Select		
Case Type is Required.		
Poordure / Penedies SELECT	Banage Amount Select	÷
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT	PARTIE	s <b>→</b>

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.

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

Figure 7.9 – Select Procedures / Remedies Window

SAVE

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

Preload Documents Case Parties Filings	) Service $ ightarrow$ Fees $ ightarrow$ Summary $ ightarrow$	
This is test content on case info page for firms.		
Location * OFS QA 2017	x -	Case Category *
Case Type *		
Appeal	X v	
Procedures / Remedies		Damage Amount
SELECT		Over \$5000 +
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT		PARTIES →

Figure 7.10 – Sample Completed Case Information Page

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

## Filing a New Case with Case Cross References

You can include case cross references in your case filing if the 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.

Ξ· 🐝 EFILE QA 01 - EFM QA4 Case Information - Draft # 4279 () -	<b>0</b> • ⊕• <b>Ⅲ</b> • <b>≜</b>
Preload Documents         Case         Parties         Filings         Service         Fees         Summary	
This is test content on case info page for firms.	
Location * OFS QA 2017 × -	Case Category *
0F5 QA 2017 × *	Case Category is Required.
Case Type *	
Select 👻	
Case Type is Required.	
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT	PARTIES →



To file a new case that uses case cross references:

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

🚍 - 🤸 εFILE QA 01 - EFM QA1 Case Information - Draft # 4344 🔞 -			<b>?</b> -	<b>.</b> -	<b></b> -	A		
Preload Documents         Case         Parties         Filings         Service         Fees         Summary	$\rightarrow$							
This is test content on case info page for firms.								
Location *		Case Category 🗶						
OFS QA 2017	× +	Civil				× +		
Case Type *								
City Ordinance Cases - \$10.00	× •							
Procedures / Remedies		Damage Amount						
SELECT		Select				•		
SELECT								
						0		
						ADD CASE CROSS REFERENCE		
Case Cross Reference Type	Case Cross Refere	nce Id				Action		
* Case Cross Reference Number ¢								
* Warrant Number (CM) =								
	Cross Reference	Type "Warrant Number" is required and must be 6 numbers long						
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT						PARTIES ->		

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

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

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

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

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

C

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

ET 🤹 EFILE QA 01 - EFM QA1 Case Information - Draft # 4344 0 -	Ø- #	- 11-	
Preload Documents Case Parties Fillings Service Fees Summary			
This is test content on case info page for firms.			
Location * OFS QA 2017	Case Category * Civil		x 👻
Case Type * City Ordinance Cases - \$10.00	X +		
Procedures / Remodes SELECT	Damage Amount Select		\$
			ADD CASE CROSS REFERENCE
Case Cross Reference Type Case	se Cross Reference Id		Action
* Case Cross Reference Number	3456		
* Warrant Number (CM) a 450	5789		
Warrant Number (CM)	2698		1
Uniform Case Number	5321		Î
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT			Ø Help

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

	PARTIES ->		SAVE AND EXIT	
9.	Click and to exit the filing.	to save your work and to continue, or click		to save your work

### Filing a New Case with a Will Filed Date

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

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

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

START FILING

1. On the Dashboard page, click

The Start Filing page is displayed.

<b>?</b> -	<b>.</b>	•	<b>≜</b> manual constant
			O Help
	<b>0</b> -	<b>9</b> . <b>⊕</b> .	<b>●</b> · <b>●</b> · <b>Ⅲ</b> ·

Figure 7.14 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

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

Figure 7.15 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Preload Documents page is displayed.

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

Filings Service I	Fees Summary	/				
	🚹 Drag	files here or BROWSE				
		Drag	Drag files here or BROWSE			



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

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

5. Select each document to be uploaded.

CASE INFORMATION → 6. Click to c

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.

Ξ· 🤹 EFILE QA 01 - EFM QA1 Case Information - Draft # 4338 🚯 -		<b>?</b> - ⊕-	<b></b>
Preload Documents         Case         Parties         Filings         Service         Fees	Summary		
This is test content on case info page for firms.			
Location *	Case Category \star		
OFS QA 2017	× • Probate or Mental H	ealth	X v
Сазе Туре 🕊	Case Sub Type		
Probate of Will	× + Select		\$
Will Filed Date *	_		
09/10/2021			
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT			PARTIES →

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

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

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

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

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

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

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

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

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

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

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

## **Entering Party Details**

Each case requires a party type.

Preload Documents Case Parties Filings Service	Fees Summary			
Party Type Required Party	Party Name			Actions
Petitioner This is a required Party				<b>A</b>
Personal 🛕 Address Additional Identifiers				Hide Details
This is test content for Pro Se Party Personal.	Matte Name Magester Select	LastName # LastName is Required.	Select.	•
Attorney Information Lad Attorney Select.				GO TO ADDRESS
Respondent This is a required Party				<b>A</b>
				ADD PARTY
← CASE INFORMATION SAVE DRAFT AND EXIT	<i>b</i> <sup>3</sup>			



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

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

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

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

Your name will be entered in the fields.

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

### GO TO ADDRESS

6. Click to enter the address information for the first party.

click

Party Type	Required Party	Party Name		Actions
Defendant	This is a required Party	Kay Defendant		1
Personal Addres	Additional Identifiers			Hide Details
Country United States Address Line 1		¢	Address Line 2	
Chy		State Select Phone Number <b>0</b>	\$	GO TO ADDITIONAL IDENTIFIERS
Plaintiff	This is a required Party	John Plaintiff		ø

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 IDEN	INTIFIERS to add more information for the specified party.	
Party Type	Required Party	Party Name	Actions
Defendant	This is a required Party	Kay Defendant	ø
Plaintiff	This is a required Party	John Plaimtiff	/
Personal	Address Additional Identifiers		Hide Details
Date of Birth MM/DD/YYYY	<b>a</b>		
Figure 7	.20 – Additional Identi	tifiers Tab on the Parties Page	
9. Type calen	dar.	n in the <b>Date of Birth</b> field, or click it is select the date from th	Ie
10. Click	to enter information	ation for the other required party.	
11. Comp	olete all of the required	fields for the second party.	
	have another party to a been added to the case		all parties
13. Click	FILINGS → to save	e your work and to continue.	
		e draft, you can stop working on the filing and resume work a d draft, navigate to the <i>Dashboard</i> page. In the Drafts pane, cli	
My Draft	s. Locate the specifie	ed draft, and then click	

### Entering Date of Death on Parties Page

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

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

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

EFILE QA 01 - EFM QA	4 Parties - Draft # 4279	() ·			<b>9</b> -	<b>.</b>	<b></b> -	2
Preload Documents Case	Parties Filing:	s > Service > Fees > Sum	imary					
Party Type	Required Party	Party Name		Lead Attorney				Actions
Petitioner	This is a required Party							<b>(A)</b>
Personal 🛕 Address	s Additional Identi	fiers						Hide Details
Party Type Petitioner								
Personal Information								
First Name *		Middle Name		Last Name \star	5	Select		\$
First Name is Required.				Last Name is Required.				
Party CMS ID		Select	\$					
Attorney Information								
ADD/EDIT ATTORNEYS								GO TO ADDRESS
tespondent	This is a required Party							<b>A</b>
								ADD PARTY
← CASE INFORMATION SAVE DR	RAFT AND EXIT		₽					

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

START FILING

The Start Filing page is displayed.

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

Figure 7.22 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

EFILE QA 01 Start Filing	<b>⊘</b> - ⊕- <u>Ⅲ</u> - <u>▲</u>
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Laaston * OFS MackCMS =	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHBOARD	
<b>β</b>	
	Ø Help
Eiguro 7.22 – Start Filing Page with Case Panes D	ianlayad

Figure 7.23 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Preload Documents page is displayed.

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

Ξ· 🤹 EFILE QA 91 - EFM QA4 Preload Documents - Draft # 4279 Ο·									
Preload Documents	Case	Parties	Filings	Service	Fees	Summary			
Drag files here or     BROWSE Maximum Filester: 50.00 MB									
Supported File Types: MPEG	MPEG) Portab	ele Document File (	PDF) TIFF Files (T	IFF TIF) Windows I	Media File (WM	V) Word 2007 File (D	() Word 97/XP File (DOC) WordPerfect File (WPD) XML Document (XML) .		CASE INFORMATION ->



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

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

5. Select each document to be uploaded.

### CASE INFORMATION $\rightarrow$

6. Click

12. Click

to continue with your filing.

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

The Case Information page is displayed.

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

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

- 9. Complete the **First Name**. **Middle Name** (if applicable), and **Last Name** fields. Also, if appropriate, select the party's suffix from the **Suffix** drop-down list.
- 10. Type the party case management system ID in the Party CMS ID field, if appropriate.
- 11. Select a language from the **Interpreter** drop-down list, if appropriate.

ADD/EDIT ATTORNEYS

to select the filing attorney.

The Attorneys window is displayed.

PARTIES -

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



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

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

LEAD ATTORNEY

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





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



to enter the address information for the first party.

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

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

17. Complete the re-	ouired fields on th	ne <b>Address</b> tab	and then click
Tr. Oompicie incre	quilled neius on ti	ic <b>Audi C33</b> lab,	

GO TO ADDITIONAL IDENTIFIERS
------------------------------

= 🐝 EFILE QA 01 - EFM Q	🗚 Parties - Draft # 4342 🕕				<b>?</b> -	<b>-</b>	<b></b> -	10000 L 10000 L 1000
Preload Documents Case	Parties Filings	> Service > Fees > Summ	ary					
Party Type	Required Party	Party Name	L	ead Attorney				Actions
Petitioner	This is a required Party	John Doe	F	Perry Mason				<i>A</i>
Personal Address	Additional Identifiers							Hide Details
This is test content for Firm-Party	-Additional Identifiers.							
Date of Birth 04/15/1980	8	Date of Death * 01/02/2020	(the second seco					
Respondent		Mary Smith	т	im Andews				1
								ADD PARTY
CASE INFORMATION SAVE D	RAFT AND EXIT							FILINGS →

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

18. Type a date in the <b>Date of Birth</b> field, or click to select a date from the calendar.
19. Type a date in the <b>Date of Death</b> 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 ADD PARTY. 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.

	QA4 Filings - Draft # 4279 € -					
load Documents Case	Parties Filings Service	> Fees > Sum	mary			
ng Code	Client Ref #	Filin	g Description			Actions
						<b>a</b> 🖉 <b>i</b>
Details 🛕 Option	al Services Communication					Hide De
Fest Content filing details Firn	n. For more information visit: www.google.com					
Filing Type \star			Filing Code \star			
eFile Only		\$	Select			*
			Filing Code is Required.			
iling Description			Client Referer	ice Number		
Comments to Court 🚯						
add comment here						
						GO TO OPTIONAL SERVICES
ASSOCIATED PARTIES						
The second se						
Documents*						
Select a filing code before upload	ding documents.					

Figure 7.29 – Filings Page

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

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

to view the case number or draft number.

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

ot Selected		Selected	
o Fee Service	\$1	→	
t Fee Service	\$10	→	
tified Copies	₩ x \$5	<b>→</b>	
Page Fee Service	₩ x	→	
be Per Party	\$10	→	
prity Processing	?? × \$4	→	
ceholder Service 1		→	
ceholder Service 2 with a long description to trigger izontal scrolling		→	
ceholder Service 3		→	
ceholder Service 4		→	
GA Decline Error	\$280	→	
ken Fee	\$10	<b>→</b>	
Page Fee No Multiplier		→	

Figure 7.30 – Sample Optional Services Tab

7. To select the applicable optional services, click

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

⇒

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

GO TO COMMUNICATION

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

9. Click

to associate parties with the filing.

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

The Associate Parties to this Filing window is displayed.

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

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

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



14. In the Documents pane, click

SELECT DOCUMENTS

Note: The filing code that you enter determines the name of the component that is displayed in the 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 Documents pane. You will be directed to upload another document for your filing.

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

Figure 7.32 – Documents Pane

Not Selected		Selected		
test.pdf	→ 🗊			
Academic_Calendar	→ ■			
	Drag files here or	BROWSE		
Maximum Filesize: <b>50.00 MB</b> Supported File Types: <b>TIFF Files (T</b>	IFF TIF) WordPerfect File (WPD	) Word 2007 File (DOC	CX) Word 97/XP File (DOC) Portab	le
	nt (XML) Windows Media File (			

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 SELECT DOCUMENTS in the Attachments section.
17. If you have attachments to add to the filing, click ELECT 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 or SKIP TO FEES ...

# Capability for Filing a Return Date

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

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

Return Date	
Out Of State Service	
Return Date	
á	) VERIFY
Return date must be verified.	



VERIFY

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



Figure 7.35 – Return Date Verified Message

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

Return Date		
Return Date 04/06/2020	ė	VERIFY

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

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

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

Figure 7.37 – Return Date Pane with Error Message Displayed

# Selecting a Return Date for a Case Filing

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

To select a return date for a case filing:

OT		<b>E</b> 111	1010
ST/	ARI	FIL	.ING

1. From the *Dashboard* page, click

5	I P	١R		LI	9

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

Figure 7.38 – Dashboard Page

The Start Filing page is displayed.

<b>?</b> -	<b>.</b> -	<b></b> -	▲
			O Help
	<b>0</b> -		●・     ●・

Figure 7.39 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

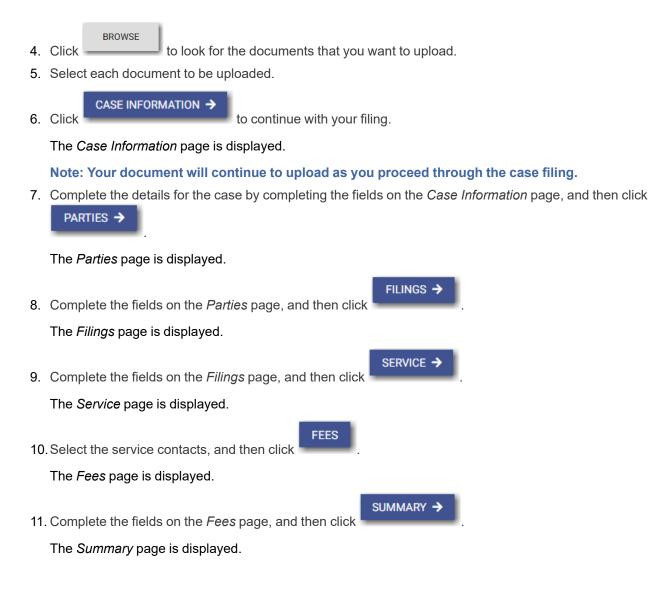
EFILE QA 01 Start Filing	<b>0</b> • ⊕• Ⅲ• <b>≜</b>
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Control * OFS MackCMS	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number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

Figure 7.40 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Preload Documents page is displayed.



E- 🌼 EFILE QA 01 - EFM QA1 Summary - D	Iant # 4345			Ø- #	)- Ⅲ- ≰	
load Documents Case Parties	Filings Service Fees Summary	learing				
Return Date						
Out Of State Service						
Return Date					Return Date	
		C VERIFY			Agreements	
Return date must be verified.					Case	
					Parties	
Case				1	Filings	
Location	Category		Туре		Service	
OFS MockCMS	Civil		Malpractice		Fees	
					SUBMIT	
Parties				Show All	SUBMIT	
Count: 2						
Filings				1		
i illigo					Calculating Fees	
Filing Type	Filing Code	Cleant Ref #	Filing Description			
eFile Only	Acknowledgement Document Name					
Component Lead Document	Academic_Calendar_Fall_2019.pdf	Acknowledgement	Security			
Download Version						
Original						
Service				1		
Count: 0						
None						
Fees				1		
Payment Account	Filing Attorney	Party Responsible for Fees	Filer Type			
Lauren's Waiver	Perry Mason	ABD Company	Default			
				Waiver Selected		
					BACK TO TOP	
FEES SAVE DRAFT AND EXIT				SUBMIT		Dн
		© 2021 Tyler Technologies, Inc.   All Rights Re	sserved   Version: 0.0.0.2013			<b>%</b>

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.

$\checkmark$				
Return Date				
04/10/2020	iii (	VERIFY		

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

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



c. Click

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

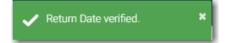


Figure 7.43 – Return Date Verified Message

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.

Return Date Out Of State Service		
Return Date 04/06/2020	Ħ	VERIFY

Figure 7.44 – Sample Return Date Pane with Valid Date Displayed

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

## **Reverify the Return Date**

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

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

# **Reverifying a Return Date**

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

To reverify the return date:

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

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

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

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

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

#### Figure 7.45 – Return Date Pane

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

# Capability for Filing Hearing Date

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

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

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

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

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

🔸 🕬	Schedule Hearing			?-	•-	<b></b> -	
hedule He	earing for Envelope #18316	7					
Select	Date	Start	End				
0	04/14/2020	8:00 AM	9:00 AM				
0	04/14/2020	9:00 AM	10:00 AM				
0	04/14/2020	10:00 AM	11:00 AM				
0	04/14/2020	11:00 AM	12:00 PM				
0	04/14/2020	12:00 PM	1:00 PM				
0	04/14/2020	1:00 PM	2:00 PM	2			
0	04/14/2020	2:00 PM	3:00 PM				
0	04/14/2020	3:00 PM	4:00 PM				
0	04/14/2020	4:00 PM	5:00 PM				
0	04/15/2020	8:00 AM	9:00 AM				
Previous 1	2 3 4 5 Next		45 Result(s) Page 1 of 5				
DO NOT SCHEDU	ILE						SAVE



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

DO NOT SCHEDULE

# Scheduling a Hearing Date for a New Case Filing

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

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

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

To schedule a hearing for a new case filing:

START FILING

1. From the *Dashboard* page, click

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

Figure 7.47 – Dashboard Page

The Start Filing page is displayed.

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

Figure 7.48 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

= 🎪 FFILE QA 01 Start Filing	<b>0</b> • ⊕• <b>Ⅲ</b> • <b>≜</b>
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Locaton * OFS MockCMS	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHBOARD	
6	
~	
	Q Help

Figure 7.49 – Start Filing Page with Case Panes Displayed

3. Click

The Preload Documents page is displayed.

BROWSE

6. Click

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

CASE INFORMATION ->

to continue with your filing.

The Case Information page is displayed.

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

🚍 🛛 🎪 EFILE QA 01 - EFM QA1 Case Information - Draft # 7490 🛛 🕕	0· +· II· 🌗
Preload Documents Case Parties Filings Service Fees Summary Hearing	
nis is test content on case info page for firms.	
Location *	Case Category *
OFS MockCMS × *	Select *
	Case Category is Required.
Case Type *	
Select 👻	
Case Type is Required.	
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT	PARTIES →

Figure 7.50 – Case Information Page

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

The *Parties* page is displayed.

=- 🤹 EFILE QA 01 - EFM QA	1 Parties - Draft # 7490 🥡 -				3	)- @- III- 🍏
Preload Documents Case	Parties Filings	Service Fees Summary He	aring			
Party Type	Required Party	Party Name		Lead Attorney		Actions
Defendant	This is a required Party					<b>A Z</b>
Personal 🛕 Address	s Additional Identifiers					Hide Details
Party Type Defendant						
Personal Information						
Person O Entity     First Name *		Middle Name		Last Name *	Suffix Select	•
First Name is Required.				Last Name is Required.		
Party CMS ID		Select	\$			
Attorney Information						
ADD/EDIT ATTORNEYS						GO TO ADDRESS
Plaintiff	This is a required Party					▲ 🖉
						ADD PARTY
← CASE INFORMATION SAVE DR	RAFT AND EXIT					FILINGS >

Figure 7.51 – Parties Page

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

FILINGS >

The Filings page is displayed.

=- 🐝 EFILE QA 01 - EFM QA1	I Filings - Draft # 7490 € •		<b>0</b> - ⊕- Ⅲ- 🍎
eload Documents Case	Parties Filings Service Fees	Summary Hearing	
ling Code	Client Ref #	Filing Description	Actions
			🔺 🗷 🗊
Details 🛕 Optional Se	ervices Communication		Hide Detail
	or more information visit: www.google.com		
Filing Type * eFile Only		Filing Code *	
of no only		Filing Code is Required.	
Filing Description		Client Reference Number	
Comments to Court			
add comment here			
			10
			G0 TO OPTIONAL SERVICES
Filing on behalf of ①			
ASSOCIATED PARTIES			
Documents*			
Select a filing code before uploading of	documents.		
			🔂 ADD FILM
PARTIES SAVE DRAFT AND EXI	т		SKIP TO FEES > > SERVICE

Figure 7.52 – Filings Page

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

### The Service page is displayed.

≡- 🤹 EFILE QA 01 - EF	M QA1 Service - Draft # 7490 🚯 -				<b>.</b>	<b>.</b> -	<b></b> -	•
Preload Documents Cas	se Parties Filings Ser	vice Fees Summary	Hearing					
Firm-Service Contact								
Add Service Contacts:								
FROM MY FIRM	ADD NE	W MAIL CONTACT						
Parties		Service Cont	ts					Show All
Type: Defendant	Name: Henry Doe	Name		Email/Mail				Count: 0
		No service c	tacts					
Type: Plaintiff	Name: Maria Jones	Name		Email/Mail				Count: 0
		No service of	tacts					
Type: NA	Name: Other Service Contacts	Name		Email/Mail				Count: 0
		No service c	tacts					
← FILINGS SAVE DRAFT AN	4D EXIT							FEES ->

Figure 7.53 – Service Page

FEES

10. Select the service contacts, and then click

The Fees page is displayed.

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

The Summary page is displayed.



SERVICE ->

EFILE QA 01 - EFM QA1 Summary	/-Draft # 7490 () ←				<b>0</b> -	⊕- ⊞-	
Preload Documents Case Parties	Filings Service Fees Summary Hearing						
Return Date		The versa			Return Date Agreements		
Return date must be verified.					Case Parties		
Case Location OFS MockCMS	Category Civil		700 Collection	1	Filings Service Fees		
Parties				Show AB	SUBMIT		
Filings				1			ß
Film; Typs eFile Only Corposent Lead Document Downad Version Original	rese Colo Abstract Of Judgment Connent Nam Academic_Colendar_Fall_2019 (1) pdf	Client Ruf # Description Abstract Of Judgment	Filing Decomption Security				
Service count 0 None				1			
Fees				1			
Payment Account Lauren's Waiver	raing Aminny Jack Stone	Party Responsible for Feen Maria Jones	nier Type Default				
				Total \$0.00 Waiver Selected			
←FEES SAVE DRAFT AND EXIT				SUBMIT	BACK TO TOP		Ø Help

Figure 7.54 – Summary Page

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

#### The Schedule Hearing page is displayed.

1999 - C	<ul> <li>Schedule Hearing</li> </ul>				9- <del>0</del> -		
hedule H	earing for Envelope #	183167					
Select	Date	Start	End				
0	04/14/2020	8:00 AM	9:00 AM				
0	04/14/2020	9:00 AM	10:00 AM				
0	04/14/2020	10:00 AM	11:00 AM				
0	04/14/2020	11:00 AM	12:00 PM				
0	04/14/2020	12:00 PM	1:00 PM				
0	04/14/2020	1:00 PM	2:00 PM		2		
0	04/14/2020	2:00 PM	3:00 PM				
0	04/14/2020	3:00 PM	4:00 PM				
0	04/14/2020	4:00 PM	5:00 PM				
0	04/15/2020	8:00 AM	9:00 AM				
revious 1	2 3 4 5 Next		45 Result(s) Page	l of 5			
_							



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



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

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

DO NOT SCHEDULE

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.

= 🐝 eFile Filing History					₽- ⊕	• •	A PRODUCTS, CONTRACTOR - 1000 -
Filing History Filter	FILING HISTORY FILIN	IG DRAFTS					2 Result(s) Page 1 of 1
Status	Envelope #						
All Statuses	Envelope # 165244 Submitted	I 01/28/2020 3:53 PM by Pro Se					
O Accepted	Filing Status	Filing Code	Filing Type	Filing Description	c	ient Ref #	
O Cancelled O Receipted	Submitted	Acquittal	eFile Only				×
O Served O Returned	Envelope #	165149					
O Submitted	Envelope # 165149 Submitted	I 01/24/2020 9:22 AM by Pro Se					
O Submitting	Filing Status	Filing Code	Filing Type	Filing Description	c	ient Ref #	
Location	Reviewed	Acknowledgement	eFile Only				
Any Location •	Previous 1 Next						2 Result(s) Page 1 of 1
Case Number / Envelope Number	_						
Case Number							
Envelope Number							
Date Range							D
Anytime     Last Month							
O Last Week							
O Last Two Days							
O Today							
O Pick a Custom Range							
From Date							
To Date 🗎							
RESET							
-							

Figure 7.56 – Filing History Page

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



The envelope details are displayed.

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



SCHEDULE HEARING

4. Click

The Schedule Hearing page is displayed.

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



SAVE

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

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

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

# Entering a Filing with an Ad Damnum Amount

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

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

#### To enter filing details:

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

=- 🤹 EFILE QA 01 - EFM QA1	Filings - Draft # 7493 🔹 🔹				<b>0</b> - ⊕- Ⅲ- 🥌
reload Documents Case	Parties Filings Service Fees	Summary			
ing Code	Client Ref #	Filing Description			Actions
reement (w/ Ad Damnum)					🔺 🖊 🗊
Details Optional Services	Communication				Hide Detai
Test Content filing details Firm. For	more information visit: www.google.com				
eFile Only		€ling Code <b>*</b>	um)		× *
Filing Description			Client Reference Number		
Comments to Court 🖲					
					GO TO OPTIONAL SERVICES
Filing on behalf of  ASSOCIATED PARTIES					
Documents*					
Component	Name	Actions	Description	Security	
Lead Document		SELECT DOCUMENTS	This document is required.		
Attachments		SELECT DOCUMENTS			
PARTIES SAVE DRAFT AND EXIT	1				SKIP TO FEES → → SERVICE

Figure 7.59 – Sample Filings Page

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

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

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

GO TO OPTIONAL SERVICES

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

The Optional Services tab is displayed.

lot Selected		Selected	
ero Fee Service	\$1	→	
lit Fee Service	\$10	÷	
rtified Copies	?? × \$5	÷	
r Page Fee Service	₩ x	→	
ce Per Party	\$10	→	
ority Processing	22 × \$4	→	
aceholder Service 1		→	
iceholder Service 2 with a long description to tri rizontal scrolling	gger	→	
ceholder Service 3		→	
ceholder Service 4		→	
IGA Decline Error	\$280	→	
oken Fee	\$10	→	
r Page Fee No Multiplier		→	
			GO TO COMMUNICATIO

Figure 7.60 – Sample Optional Services Tab

7. To select the applicable optional services, click

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

⇒

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

GO TO COMMUNICATION

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

9. Click

to associate parties with the filing.

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

The Associate Parties to this Filing window is displayed.

### Figure 7.61 – 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.



Note: The filing code that you enter determines the name of the component that is displayed in the 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 Documents pane. You will be directed to upload another document for your filing.

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

Figure 7.62 – Documents Pane

Not Selected		Selected		
test.pdf	→ 🗊			
Academic_Calendar	→ ■			
	Drag files here or	BROWSE		
Maximum Filesize: <b>50.00 MB</b> Supported File Types: <b>TIFF Files (T</b>	IFF TIF) WordPerfect File (WPD	) Word 2007 File (DOC	CX) Word 97/XP File (DOC) Portab	le
	nt (XML) Windows Media File (			

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

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

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

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

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

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

Ξ- 🤹 EFILE QA 01 - EFM QA1 Fees - Draft # 7508 3 -	Q-	Ø. <del>.</del>	<b>0</b> - ⊕- Ⅲ-
Preload Documents Case Parties Filings Service Fees Summary			
Pro se-fees			
Ad Damnum 🔺			
15			
Use Existing Payment Account     O Create New Payment Account			
Payment Account *			
Mastercard Credit Card X *			
Party Responsible for Fees *			
Paul Smith    SEARCH			
Filer Type			
Default +			
HI CALCULATE FEES			
SAVE DRAFT AND EXIT			SUM

Figure 7.64 – Sample 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, or follow the steps to create a new payment account.
- 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 filer type from the Filer Type drop-down list.



The fees for the filing are displayed.

≡• 🤹 EFILE QA 01 - EFM QA1 Fees - Draft # 7508 0 •		0· #· III· 🌗
Preload Documents Case Parties Filings Service Fees Summary		
Pro se-fees	🏛 Damages	^
Ad Damnum 🛊		
15	Case Initiation Fee	\$10.00
Use Existing Payment Account     O Create New Payment Account		Subtotal \$10.00
Payment Account *		
Mastercard Credit Card X *	Agreement (w/ Ad Damnum)	^
Party Responsible for Fees *	Filing Fee	\$1.00
Paul Smith		Subtotal \$1.00
File Type		
Default *	Service Fees	^
	Total Service Fees	\$1.00
CALCULATE FEES	Convenience Fee	\$1.00
	Total Court Service Fees	\$1.00
		Subtotal \$3.00
		Grand Total \$14.00
← SERVICE SAVE DRAFT AND EXIT		SUMMARY →

Figure 7.65 – Example of the Ad Damnum Fees on the Fees Page

SUMMARY 27. 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.

EFILE QA 01 - EFM C					
oad Documents Case	Parties Filings Service	Fees Sun	nmary		
g Code	Client Ref #	Eili	ng Description		Actions
Joode	Gient Rei #		ig beschption		
					🔺 🗹 🚺
Details 🛕 Optiona	I Services Communication				Hide D
	. For more information visit: www.google.cor	n			
ling Type *			Filing Code *		
eFile Only		\$	Select		-
			Filing Code is Required.		
ing Description			Client Reference Number		
omments to Court					
dd comment here					
					GO TO OPTIONAL SERVICES
ASSOCIATED PARTIES					
ASSOCIATED PARTIES					
Documents*					
	an decomposite				
elect a filing code before uploadir	ng aocuments.				

### Figure 7.66 – Filings Page

To enter a filing with a Motion Type code:

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

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

Motion Type 🚯	
Select	\$ N
Select	h.
Motion Type - Structured Settlement	
Motion Type - Uncontested Prove Up	
Motion Type - Default Prove Up	
Motion Type - Motion	

Figure 7.67 – Sample Motion Type Drop-Down List

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

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

GO TO OPTIONAL SERVICES

The Optional Services tab is displayed.

Details Optional Services Communication		
Not Selected		Selected
Zero Fee Service	\$1 <del>```</del>	
Split Fee Service	\$10 >	
Certified Copies	₩ x \$5 →	
Per Page Fee Service	™ × →	
Once Per Party	\$10 <del>``</del>	
Priority Processing	>> × \$4. →	
Placeholder Service 1	<b>→</b>	
Placeholder Service 2 with a long description to trigger orizontal scrolling	<b>*</b>	1
laceholder Service 3	÷	
laceholder Service 4	÷	
OGA Decline Error	\$280	
3roken Fee	\$10 <b>→</b>	
Per Page Fee No Multiplier	<b>→</b>	
		GO TO COMMUNIC
		3010 COMMON

Figure 7.68 – Sample Optional Services Tab

8. To select the applicable optional services, click



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

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



GO TO COMMUNICATION

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

ASSOCIATED PARTIES

to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

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

Figure 7.69 – Associate Parties to this Filing Window

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

10. Click

- 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.



15. In the Documents pane, click

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

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

Figure 7.70 – Documents Pane

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

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ ■			
	Drag files here o	PROWOF		
	Drag mes nere o	BROWSE		
/laximum Filesize: 50.00 MB				
Supported File Types: <b>TIFF Files (T</b>	IFF TIF) WordPerfect File (WP	D) Word 2007 File (DO	CX) Word 97/XP File (	DOC) Portable
ocument File (PDF) XML Docume	ent (XML) Windows Media File	(WMV) MPEG (MPEG)		

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

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

<ul> <li>16. Click to select the lead document if a document has already been uploaded. Click to look for a document to upload or to locate additional lead documents.</li> </ul>	BROWSE
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 att	achments to add	to the filing, click	SELECT DOCUMENTS	in the Attachme	ents section.
-		ny of the documents	s, select an option		
20. If you want to	add another filing	next Filin	-	t the same steps f	or the next filing.
21.After you have	e added all of the	filings, click either	SERVICE →	SKIP TO FEES	
E · · · · · · · · · · · · · · · · · · ·	ft # 7513 ① - Filings Service Fees Summa	ary			0· ÷· II· 🎒
Filing Code Motions	Client Ref #	Filing Description			Actions
Details Optional Services Com	munication				Hido Details
Test Content filing details Firm. For more inform	nation visit: www.google.com	Filing Code 🕷			
Filing Type # eFile and Serve		e Motions			X *
Motion Type  Motion Hearing		•			
Filing Description			Cliant Reference Number		
Comments to Court 🖗 add comment here					ĥ
					GO TO OPTIONAL SERVICES
Pring on behalf of  ASSOCIATED PARTIES					
Documents*					
Component	Name	Actions	Description	Security	
Lead Document		SELECT DOCUMENTS	This document is required.		
Attachments		SELECT DOCUMENTS			
L					ADD FILING
← PARTIES SAVE DRAFT AND EXIT					D Help

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.

ad Documents Case	Parties Filings Service Fees	Summary			
Code	Client Ref #	Filing Description			Action
r w/ special behavior					<b>A</b> 🖉
Details Optional Service	ces Communication				Hide D
est Content filing details Firm.	For more information visit: www.google.com				
ng Type ₩ eFile and Serve		e Filing Code ₩	behavior		× -
ng Description			Client Reference Number		
mments to Court 🚯					
d comment here					
				GO TO	OPTIONAL SERVICES
ng on bahalf of  ASSOCIATED PARTIES					
ocuments*					
Component	Name	Actions	Description	Security	
Lead Document		SELECT DOCUMENTS	This document is required.		
Attachments		SELECT DOCUMENTS			

#### Figure 7.73 – Sample 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.

ot Selected		Selected	
o Fee Service	\$1	→	
t Fee Service	\$10	→	
tified Copies	₩ x \$5	<b>→</b>	
Page Fee Service	₩ x	→	
be Per Party	\$10	→	
prity Processing	?? × \$4	→	
ceholder Service 1		→	
ceholder Service 2 with a long description to trigger izontal scrolling		→	
ceholder Service 3		→	
ceholder Service 4		→	
GA Decline Error	\$280	→	
ken Fee	\$10	<b>→</b>	
Page Fee No Multiplier		→	

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

GO TO COMMUNICATION

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

9. Click

to associate parties with the filing.

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

The Associate Parties to this Filing window is displayed.



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

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



14. In the Documents pane, click

SELECT DOCUMENTS

Note: The filing code that you enter determines the name of the component that is displayed in the 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 Documents pane. You will be directed to upload another document for your filing.

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

Figure 7.76 – Documents Pane

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ <b>Î</b>			
	Drag files here or	BROWSE		
Maximum Filesize: 50.00 MB				
Supported File Types: <b>TIFF Files (</b>	TIFF TIF) WordPerfect File (WPD	) Word 2007 File (DOC	CX) Word 97/XP File (DOC) Po	ortable

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

#### The Fees page is displayed.

≡• 🤹 EFILE QA 01 - EFM QA1 Fees - Draft # 7529 🚯 -		Ø-	<b>∂</b> - ⊕-	<b>@</b> - <b>⊕</b> - <u>Ⅲ</u> -	<b>@</b> - <b>∰</b> - <b>Ⅲ</b> -
Preload Documents Case Parties Filings Service Fees Summary					
Pro se-fees					
Claim Amount *					
10000					
Use Existing Payment Account     O Create New Payment Account					
Payment Account *					
Mastercard Credit Card × 👻					
Party Responsible for Fees *					
Justin Jones ¢ SEARCH					
Filer Type					
Default +					
	,	,	,		
CALCULATE FEES					
				_	_
SAVE DRAFT AND EXIT				su	SUMM

Figure 7.78 – Sample 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, or follow the steps to create a new payment account.
- 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 filer type from the Filer Type drop-down list.



The fees for the filing are displayed.

	Q.	⊕- III-
Preload Documents Case Parties Filings Service Fees Summary		
Pro se-fees	1 Other Civil	^
Claim Amount * 10000		
1000	Case Initiation Fee	\$5.00 Subtotal \$5.00
Use Existing Payment Account 🔿 Create New Payment Account		Subtotal \$5.00
Payment Account *	Not served as a static structure	^
Mastercard Credit Card X *	Waiver w/ special behavior	<b>^</b>
Party Responsible for Fees 🕸	Filing Fee	\$10.00
Justin Jones		Subtotal \$10.00
FilerType		
Default +	Service Fees	^
	Total Service Fees Convenience Fee	\$1.00 \$1.00
CALCULATE FEES	Total Court Service Fees	\$1.00
		Subtotal \$3.00
		Grand Total \$18.00
SAVE DRAFT AND EXIT		

Figure 7.79 – Example of the Claim Amount Fees on the Fees Page

27. Click

SUMMARY

to review and complete your filing.

### Entering a Filing with an Estate Value

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

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

To enter filing details:

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

	Parties Filings Service Fees Sum	nmary			
Code	Client Ref #	Filing Description			Actio
ment w/ special behavior					/
Details Optional Services	Communication				Hida
st content pro se filing details.					
ng Type 🛊		Filing Code *			
eFile Only		Statement w/	special behavior - \$10.00		×
ng Description			Client Reference Number		
ments to Court 🚯					
d comment here					
					GO TO OPTIONAL SERVICES
ng on bahari of 🜒 ASSOCIATED PARTIES					
ASSOCIATED PARTIES	Name	Actions	Description	Security	
ASSOCIATED PARTIES OCUMENTS * omponent	Name Academic,Calendur,Fall,2019 (1) pdf	Actions	Description  Description  Academic_Calendar_Fail_2019 (1).pdf	Security Public (G)	
associated parties		/	Description		aa
ASSOCIATED PARTIES OCUMENTS* ormponent ead Document		AUTO-REDACT	Description		

#### Figure 7.80 – Sample 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.

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

Figure 7.81 – Sample Optional Services Tab

7. To select the applicable optional services, click

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

⇒

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

GO TO COMMUNICATION

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

9. Click

to associate parties with the filing.

Associate Parties to this Filing Party Type Select. FILTER RESET ÷ Select Party Name Party Type Phil Defendant Defendant Susan Plaintiff Plaintiff 2 Result(s) Page 1 of 1 CANCEL SAVE

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

#### Figure 7.82 – 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.



Note: The filing code that you enter determines the name of the component that is displayed in the 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 Documents pane. You will be directed to upload another document for your filing.

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

Figure 7.83 – Documents Pane

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→			
	Drag files here or	BROWSE		
	Drag mes here or	DRUWSE		
Maximum Filesize: 50.00 MB				
Supported File Types: <b>TIFF Files (</b>	TIFF TIF) WordPerfect File (WPD	) Word 2007 File (DOC	CX) Word 97/XP File (DOC) Por	table

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 to look for a document to upload or to locate additional lead documents.

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

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

#### The Fees page is displayed.

😑 - 🤸 εfile qa α1 - εfia qa 11 - Fees - Draft # 7537 🚯 -	<b>?</b> -	<b>-</b>	-	
Preload Documents Case Parties Filings Service Fees Summary				
tro se-fees				
Estate Value *				
200000				
Use Existing Payment Account     O Create New Payment Account  Payment Account *				
Perjamen Account & Mastercard Credit Card X *				
Party Responsible for Frees <b>*</b>				
Susie Smith				
Filer Type				
Default e				
CALCULATE FEES				
SAVE DRAFT AND EXIT			SU	М

Figure 7.85 – Sample 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, or follow the steps to create a new payment account.
- 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 filer type from the Filer Type drop-down list.

26. Click

The fees for the filing are displayed.

		Ø III-
Preload Documents Case Parties Filings Service Fees Summary		
o se-fees	1 Other Civil	^
state Value 🛪		
00000	Case Initiation Fee	\$5.00
Use Existing Payment Account O Create New Payment Account		Subtotal \$5.00
ayment Account *		
Mastercard Credit Card X V	Statement w/ special behavior	^
urty Responsible for Fees *	Filing Fee	\$10.00
Susie Smith		Subtotal \$10.00
iler Type		
Default \$	Service Fees	^
	Total Service Fees	\$1.00
	Convenience Fee	\$1.00
HI CALCULATE FEES	Total Court Service Fees	\$1.00
		Subtotal \$3.00
		Grand Total \$18.
SAVE DRAFT AND EXIT		SUMMARY

Figure 7.86 – Example of the Estate Value Fees on the Fees Page

27. Click to review and complete your filing.

## **Entering Payment Information**

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

🚍 🛛 🤹 Efile qa 01 - Efim qa 1 Fees - Draft # 4312 🔞 -	?-	<b>.</b> -	<b></b> -	·
Preload Documents Case Parties Filings Service Fees Summary				
Pro se-fees				
Use Existing Payment Account				
Payment Account *				
waliver Waiver × 👻				
Party Responsible for Frees				
Select : SEARCH				
Filer Type				
Select e				
SAVE DRAFT AND EXIT				





to view the case number or draft number.

#### To enter the payment information for your filing:

- 1. Select one of the payment options:
  - If you have already created a payment account, select the **Use Existing Payment Account** option. Then, continue to Step 2.

 If you do not have an existing payment account created, select the Create New Payment Account option. The Create New Payment Account window is displayed. Assign a name to the new payment account. Then, select the account type:

- For a waiver account, click . Then, continue to step 3.	
<ul> <li>For a credit card or bank account, click</li> <li>ADD PAYMENT ACCOUNT</li> <li>The Enter Information window for the type of account that you want to create. Then, click</li> <li>Continue and go to step 3.</li> <li>Note: For detailed information on how to complete the fields in the Enter</li> </ul>	-
<i>Information</i> window, refer to Adding a Credit Card Payment Account, page 27 and Adding an E-Check Payment Account, page 30.	

- 2. Select the payment account from the Payment Account drop-down list.
- 3. Select the party responsible for fees from the **Party Responsible for Fees** drop-down list. Click

SEARCH

if you want to search for a party.

Select Party Resp	onsible For Fees				
First Name	Last Name	Entity	Select	¢ FILTER	RESET
Select	Party Name			Party Type	
0	Mary Jones			Plaintiff	
•	John Smith			Defendant	
Previous 1 Next					2 Result(s) Page 1 of 1
					CANCEL SAVE

Figure 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.

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

5. Click CALCULATE FEES

The fees for the filing are displayed.

nents Case Parties Filings Service Fees Summary		
ig Payment Account O Create New Payment Account	Abstract Of Judgment	^
Credit Card 🗴 👻	Filing Fee	\$5.00
		Subtotal \$5.00
Frees # SEARCH		
÷ SEARCH	\$ Optional Service Fees	^
\$	Certified Copies (\$5.00 x 1)	\$5.00
		Subtotal \$5.00
	Service Fees	~
HI CALCOLATE FEES	Service Fees	<u>^</u>
	Total Service Fees	\$1.00
	Convenience Fee	\$1.00
	Total Court Service Fees	\$1.00
		Subtotal \$3.00
		Grand Total \$13
		Grand Total \$13

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

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

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

≡• 🤹 EFILE QA 01 - EFM QA1 Fees - Draft # 4312 🚯 •	<b>0-</b> •	<b>⊕</b> - Ⅲ-	•
Preload Documents Case Parties Filings Service Fees Summary			
Pro se-fees			
Use Existing Payment Account O Create New Payment Account	🛓 Abstract Of Judgment		^
Payment Account *			
Mastercard Credit Card X V	Filing Fee		\$5.00
Party Responsible for Fees 🗰		Subtotal	\$5.00
James Doe	\$ Optional Service Fees		~
	Optional Service rees		
Filer Type Default	Certified Copies (\$5.00 x 1)		\$5.00
		Subtotal	\$5.00
CALCULATE FEES	Mail Service Fees		^
	Total Mail Service Fees		\$6.00
		Subtotal	\$6.00
	📥 Service Fees		^
	Total Service Fees		\$1.00
	Convenience Fee Total Court Service Fees		\$1.00 \$1.00
	Total Court Service Fees	Subtotal	
		Subtotal	\$3.00
		Grand Tota	I \$19.00
		_	
← SERVICE SAVE DRAFT AND EXIT		SUN	MMARY →

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



6. Review the filing fees, and then click

## Entering Payment Information for Per-Page Optional Service Fee

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

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

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

To enter the payment information for your filing:

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

#### GO TO OPTIONAL SERVICES

c. Click

The **Optional Services** tab is displayed.

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





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.

SEARCH

- 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, or follow the steps to create a new payment account.
- 7. Select the party responsible for fees from the Party Responsible for Fees drop-down list. Click

	if you want to	search for a pa	irty.		
Select Party	Responsible For Fees	:			
First Name	Last Name	Entity	Party Type Select	₽ FILTER	RESET
Select	Party Name			Party Type	
0	Mary Jones			Plaintiff	
•	John Smith			Defendant	
Previous 1	Next				2 Result(s) Page 1 of 1
					CANCEL SAVE

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.

≣• 🤹 EFILE QA 01 - EFM QA 1 Fees - Draft # 4312	g.	⊕· III· 🌗
Preload Documents Case Parties Filings Service Fees Summary		
Pro se-fees		
Use Existing Payment Account     O Create New Payment Account	Abstract Of Judgment	^
Payment Account *		
Mastercard Credit Card × 👻	Filing Fee	\$5.00
		Subtotal \$5.00
Party Responsible for Fees * James Doe		
James Due	\$ Optional Service Fees	^
Filer Type		
Default +	Certified Copies (\$5.00 x 1)	\$5.00
	Per Page Fee Service (\$2.50 x 3)	\$7.50
		Subtotal \$12.50
CALCULATE FEES		
	Service Fees	^
	Total Service Fees Convenience Fee	\$1.00 \$1.00
	Total Court Service Fees	\$1.00
		Subtotal \$3.00
		Grand Total \$20.50
← SERVICE SAVE DRAFT AND EXIT		SUMMARY ->

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

SUMMARY 🗲

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.

Submission Agreements I agree that this filing is in compliance with the Rules for E-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.

Submission Agreements

This is the first disclaimer.

This is a second disclaimer.

You must accept the Submission Agreements.

Figure 7.96 – Submission Agreements Pane – Two Disclaimers

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

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

Figure 7.97 – Submission Agreements Pane with the Check Boxes Selected – Two Disclaimers

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

Submission Agreements

Figure 7.98 – Submission Agreements – No Disclaimers

### Viewing the Envelope Summary

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

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

#### To view the envelope summary:

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

The Summary page is displayed.

SUMMARY ->

Submission Agreements					
I agree that this filing is in compliance w					
You must accept the Submission Agreeme	nts.				Agreements
Case				1	Case
cation	Category	Туре			Parties
FS QA 2017	Family	Division	Of Property		Filings
Parties				~ /	Service
unt:2				Show All	Fees
					SUBMIT
ilings				1	-
Filing Type eFile Only	Filing Code Acknowledgement	Client Ref #	Filing Description		
Component	Document Name	Description	Socurity		Calculating Fees
Lead Document	Academic_Calendar_Fall_2019 (1).pdf	Academic_Calendar_Fall_2019 (1).pdf	Confidential (G)		
Original					
ervice				1	
unt:0					
ees				1	
yment Account auren's Waiver	Filing Attorney Perry Mason	Party Responsible for Fees George Doe	Piler Type Default		
				Waiver Selected	

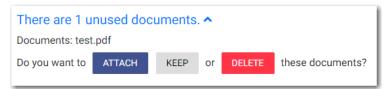
#### Figure 7.99 – Sample Summary Page

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.

Case	Category	Туре		1
OFS QA 2017	Civil	Fraud		
Parties Count 2				Show AB
Filings				1
Filing Type eFile and Serve	Filing Code Acknowledgement	Client Ref #	Filing Description	
Component Lead Document Download Version Original	Document Name Academic_Calendar_Spring_2019.pdf	Description Academic_Calendar_Spring_2019.pdf	Security Confidential (G)	
Service				Hide all
Lillian Henderson 1201 tenth ave Plano, TX 75024 Associated Parties: Mary Doe	Service Method: Mail			
Fees				1
Payment Account Firm's CC	Filing Attorney Perry Mason	Party Responsible for Fees Mary Doe	Flier Type Default	
🏛 Fraud				^
Case Initiation Fee				\$10.00 Subtotal \$10.00
Mail Service Fees				^
Total Mail Service Fees				\$6.00 Subtotal \$6.00

Figure 7.100 – Sample Summary Page with Mail Service Fees Displayed

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



#### Figure 7.101 – Unused Documents Message

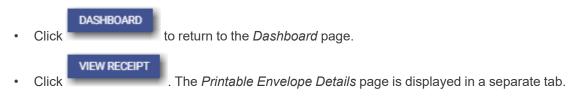
- 3. Click the appropriate button regarding the unused document.
- 4. If there are submission agreements for your filing, select the appropriate check boxes for the submission agreements.
- 5. Review the summary of the case filing. After you are satisfied with the information in your filing, click SUBMIT

The Envelope Submitting window is displayed.

Envelope Submitting				×
Envelope #27878 is submitting.				
	$\square$			
	DASHBOARD	VIEW RECEIPT	START NEW ENVELOPE	

Figure 7.102 – Envelope Submitting Window

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



EFILE QA 01 - EFM QA4 Printable Envelope De	tails		@· ⊕- ≣·	
Details - Envelope # 27878				
Case				
NFS QA 2017	Category		Type #########	
Parties				Show All
ount 2				
Filings				
Ing Code Petition (Open Case)	Client Ref #	Filing Description Summons for Amy Doe	Submitted Date 08/05/2021 11:44 AM	
ubmitted	Roview Date	Description	Security	
ead Document	SUMMONS for Amy Doe.pdf	window ground	Public (T)	
ing Code	Client Ref #	Filing Description Case Information	Submitted Date	
ction - Initial Only atus ubmitted	Review Date	Case information	08/05/2021 11:44 AM	
ead Document	Document Name Civil Domestic Filing Form1.pdf	Description	Security Public (T)	
ownload Version Vriginal				
ing Code icknowledgement	Client Ref #	Filing Description	Subvetted Date 08/05/2021 11:44 AM	
ubmitted	Review Date			
ead Document	Document Name document.pdf	Description	Security Confidential (G)	
riginal				
Service				
unt 0				
ees				
auren's Waiver	Filing Attorney Abby Carmichael	Party Responsible for Fees Joanne Doe	Filer Type Default	
der ID	Transaction Response	Transaction Amount \$0.00	Transaction 10	Оне
				D Hei Totai - 50.00

Figure 7.103 – Sample Printable Envelope Details Page

View the envelope details, and then close the tab. Then, in the Envelope Submitting window,



• Click x to close the *Envelope Submitting* window. The *Dashboard* page is displayed.

## Viewing Case Address Information on the Summary Page

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

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

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

#### To view the case address information in the envelope summary:

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

SUMMARY 🗲

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

#### The Summary page is displayed.

🗐 🔸 🙀 EFILE QA 01 - EFM QA1 Summary - Dra	ift # 4333 () ~			ø· ⊕- Ⅲ·	1 marrie 100 genue - 100
reload Documents Case Parties	Filings Service Fees Summary				
Submission Agreements	Rules for E-Filing				
Case DFS QA 2017 CTA ADMR SS Main Street Dallas, TX 75220 US Dallas	Compry Civil	nye Notice	Of Removal	Agreem Case Parties Filings Service Fees	nts
Parties Count: 2				SUBN Sbow AS	ит
Filings				✓ Calculating	] Fees
Films Type eFile Only Compared Lead Document Exemised Version Original	Hing Code Acknowledgement Doursent Hena Academie, Calendar, Fall_2019 (1),pdf	Cleant fair # Description Accademics_Calendar_Fall_2019 (1).pdf	Piling Description Security Confidential (G)		
Service				1	
Fees aymen Account .auren's Waiver	rang attorney Perry Mason	Pany Responsible for Para John Doe	Piler Type Default	1	
				Waiver Selected	
FEES SAVE DRAFT AND EXIT				SUBMIT BACK TO	О не

Figure 7.104 – Case Address Information on the Summary Page

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

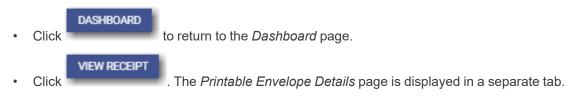


The Envelope Submitting window is displayed.

Envelope Submitting		×
Envelope #27878 is submitting.		
	C <sub>3</sub>	
	DASHBOARD VIEW RECEIPT START NEW ENVELOP	E

Figure 7.105 – Envelope Submitting Window

5. In the *Envelope Submitting* window, do one of the following:



EFILE QA 01 - EFM QA4 Printable Envelope Details	1			<b>0</b> -	÷-	<b>.</b>	
Details - Envelope # 27878							
Case							
beation FS QA 2017	Category #########		Туре ******				
Parties							Show All
Filings							
ling Code Petition (Open Case)	Client Ref #	Ring Description Summons for Amy Doe		Submitted Date 08/05/2021 11:44 AM			
lates lubmitted	Review Date Document Name	Description		Security			
ead Document ownload Version	SUMMONS for Amy Doe.pdf	Unacription		Public (T)			
riginal	Client Ref #	Filing Description		Submitted Date			
action - Initial Only	Review Date	Case Information		08/05/2021 11:44 AM			
Submitted component Lead Document	Decument Name Civil Domestic Filing Form1.pdf	Description		Security Public (T)			
ownload Version Xriginal	on concern night on the						
ing Code Icknowledgement	Client Ref #	Filing Description		Submitted Date 08/05/2021 11:44 AM			
tatus Jubmitted	Roview Date						
ead Document	Document, Pame document, pdf	Description		Security Confidential (G)			
Vriginal							
Service							
oust 0 Ione							
ees							
auren's Waiver	Filing Attorney Abby Carmichael	Party Responsible for Fees Joanne Doe		Filer Type Default			
der ID	Transaction Response	Transaction Amount \$0.00		Transaction ID			Dн
							Total Solo

Figure 7.106 – Sample Printable Envelope Details Page

View the envelope details, and then close the tab. Then, in the Envelope Submitting window,

START NEW ENVELOPE	click either	DASHBOARD	or	START NEW ENVELOPE	
	STAR	T NEW ENVELOPE		The <i>Start Filing</i> page is	

• Click **x** to close the *Envelope Submitting* window. The *Dashboard* page is displayed.

.

# 8 Auto Generated Documents

#### Topics covered in this chapter

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

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.

10. Click

October	2021	

≡- 🌼 EFILE QA 01 - EFM QA1 Case Information - Draft # 7562 🕕		8-	<b>.</b>	-	•
Preload Documents         Case         Parties         Filings         Service         Fees         Summary         Hearing					
This is test content on case info page for firms.					
Location *	Case Category *				
OFS MockCMS × -	Civil				× -
https://www.collincountytx.gov/district_courts/Pages/default.aspx					
Case Type * Negligence × *					
Procedures / Remedies	Damage Amount				
SELECT	Select				•
If the action is related to another action(s) pending or previously pending in this court involving some or all the same par Indead Case	ies, subject matter, or factual issues, enter the related case numbers: Additional fielded Case				
I hereby certify that the documents in this filing, including attachments and exhibits, satisfy the requirements for reda	ction of personal or confidential information in OCGA § 9-11-7.1.				
Do you or your client need any disability accommodations? If so, please describe the accommodation request.					
Accommodation Request					
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT				P	ARTIES 🗲

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

#### PRELOAD 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 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.

Parties 🗲

to save your work and to continue.

to view the case number or draft number.



## 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.

=- 🌼 eFile Parties Dra	ift # 16258 🕕 -	<b>8</b> -	<b>.</b> -	<b></b> -	L
Preload Documents Case	Parties Filings Service Fees Summary				
Party Type	Required Party Party Name				Actions
Plaintiff	This is a required Party Patty Plaintiff				1
Defendant	This is a required Party				
					▲ 🖉
Personal 🛕 Addre	Additional Identifiers				Hide Details
Party-Personal-ProSe					
Party Type Defendant					
Personal Information					
Person     Entity					
I AM THIS PARTY					
First Name 🗚	Middle Name Last Name \star		Select		\$
First Name is Required.	Last Name is Required.				
Party CMS ID	Service of Process * Select				•
	Service of Process is Required.				•
Attorney Information					
Select	•				GO TO ADDRESS
	NDACT AND EVIT				
	© 2021 Tyler Technologies. Inc.   All Rights Reserved   Version: 2021.7.1.2				EMPOWERED BY

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. If available, select an option from the Service of Process drop-down list.

Service of Process *	
Select	•
Select	
Filing Acknowledgement of Service	
Filing Waiver of Service	
Sheriff's Entry of Service	
Summons	
No Summons Required	

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.

=- 🐝 eFile Parties - Draf	ft # 16258 🚺 •						<b>9</b> -	<b>.</b>	<b></b> -	
Preload Documents Case	Parties Filing	js Servio	ce Fees	Summary	$\rangle$					
Party Type	Required Party	P	arty Name							Actions
Plaintiff	This is a required Party	P	atty Plaintiff							ø
Defendant	This is a required Party	D	arlene Defendan	t						<i>I</i>
Personal Address	Additional Identifiers									Hide Details
Party-Personal-ProSe										
Party Type Defendant										
Personal Information										
Person O Entity I AM THIS PARTY										
First Name 🗰		Middle Name				Last Name 🖈		Suffix		
Darlene						Defendant		Select.		\$
Party CMS ID						Service of Process *				
						Summons				+
Attorney Information										
Lead Attorney Select	\$									GO TO ADDRESS
										ADD PARTY
← CASE INFORMATION SAVE D	DRAFT AND EXIT									FILINGS 🔿
										D Help

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



to enter the address information for the first party.

Party Type	Required Party	Party Name	Lead Attorney	Actions
Defendant	This is a required Party	Eleanor Defendant	Perry Mason	ď
Plaintiff	This is a required Party	Thomas Plaintiff	Sam Smith	ð
Personal Addre	Additional Identifiers			Hids Details
Country United States Address Line 1		÷	Address Line 2	
City		State Select Phone Number	Zip Cc ¢	de
		a sayate Montholes 😈		GO TO ADDITIONAL IDENTIFIERS

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	GO TO ADDITIONAL ID		dd more information for the specified part	у.
Party Type	Required Party	Party Name	Lead Attorney	Actions
Defendant	This is a required Party	Eleanor Defendant	Perry Mason	Ø
Plaintiff	This is a required Party	Thomas Plaintiff	Sam Smith	ø
Personal	Address Additional Identifiers			Hide Details
Date of Birth MM/DD/YYYY	8			
Figure 8.0	6 – Additional Ident	ifiers Tab on th	e Parties Page	
12. Type t calend	he party's date of bir lar.	th in the <b>Date of</b>	<b>Birth</b> field, or click <b>birth</b> to select the da	ate from the
13. Click	to enter inform	nation for the oth	ner required party.	
14. Compl	lete all of the require	d fields for the se	econd party.	
	have another party to been added to the ca		e, click Continue to add pa	arties until all parties
16. Click	FILINGS → to sav	ve your work and	d to continue.	
			In stop working on the filing and resun te to the <i>Dashboard</i> page. In the Drafts	
My Drafts	s. Locate the specif	ied draft, and th	nen 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.

Auto Generated Filings				-
Filing Code	Filing Description	Filing Component	Document Name	Document Security
Action - Initial Only	Case Information	Lead Document	Civil Domestic Filing Form1.pdf	Public (T)
Petition (Open Case)	Summons for Jane Doe	Lead Document	SUMMONS for Jane Doe.pdf	Public (T)
← PARTIES SAVE DRAFT AND EXIT				SKIP TO FEES → → SERVICE →

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

gene     name     name     name       Restor form     Constrained		0.				<b>0</b> · ⊕· Ⅲ• 🎆
	Preload Documents Case Parties	s Filings Service Fees Summary				
	Filing Code	Client Ref #	Filing Description			Actions
	Acknowledgment					/ 1
	Detells Optional Services Co	Communication				Haribitatha
	Filing-Details-Firm					
	Filing Type *					
	eFile Only		Acknowledgment			× *
Concerts*     Saven     Saven     Saven     Saven       Concerts*     Saven     Saven     Saven     Saven       Savents     Saven     Saven     Saven     Saven       Savents     Saven     Saven     Saven     Saven	FilingDescription			Client Enderworce Namber		
Secures as a secure as	Commente lo Court					
Secures as a secure as						
Secures as a secure as						li li
dampe     Mark     Meet     Despite     Despite     Despite       Lad Document     Adatamore_Salestary, all 2011 (1) all     Image:						GO TO OPTIONAL SERVICES
Attabundagener     Attabundagener	Documents*	Name	Artions	Description	Security	
Accordengent in accordengent i	Lead Document	Academic_Calendar_Fall_2019 (1).pdf		Description		
Nutley Sociality           golds         Pilog Sociality         Sociality Table			~	Acknowledgment	Select	:
Nutley Sociality           golds         Pilog Sociality         Sociality Table					11	
Description         Play Description         Play Description         Play Description         Description <thdescription< th="">         Description         Descript</thdescription<>	Attachments		SELECT DOCLMENTS			
Description         Play Description         Play Description         Play Description         Description <thdescription< th="">         Description         Descript</thdescription<>						
Apple Description         Pring Description         Pring Description         Description <thdescription< th="">         Description         Descr</thdescription<>	uto Concreted Filing-					C ADD FILIN
Case information Sweet         Lad Socument         Duit Socuescits Filing frame2.pdf         Support Court Socureert           Scalars         Sourcess for Dots Defendant pdf         Support Court Socureert         Support Court Socureert			Film Summer		Record Grant	
Ration Summons for Dots Diffedant Las Document Las Document SUMMONT for Dots Diffedant pdf Support Court Document						
	erification					
	← PARTIES SAVE DRAFT AND EXIT					SKIP TO FEES → → SERVICE →

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

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



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

ESO-FS-200-4494 v.13

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The Optional Services tab is displayed.

Details Optional Services Communicat	ion	
Not Selected		Selected
Zero Fee Service	\$1	$\rightarrow$
Split Fee Service	\$10	$\rightarrow$
Certified Copies	22 × \$5	$\rightarrow$
Per Page Fee Service	77 x	→
Once Per Party	\$10	→
Priority Processing	?? x \$4	→
Placeholder Service 1		→
Placeholder Service 2 with a long description to trigg norizontal scrolling	er	→
Placeholder Service 3		$\rightarrow$
Placeholder Service 4		$\rightarrow$
r0GA Decline Error	\$280	$\rightarrow$
Broken Fee	\$10	→
Per Page Fee No Multiplier		→
		GO TO COMMUNICA

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



GO TO COMMUNICATION

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

ASSOCIATED PARTIES

9. Click to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

Associate Parties to this Filing					
First Name	Last Name	Entity	Party Type Select	FILTER RESET	
Select	Party Name			Party Type	
	Phil Defendant			Defendant	
	Susan Plaintiff			Plaintiff	
Previous 1 Next				2 Result(3) Page	
				CANCEL SAV	

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.



14. In the Documents pane, click

Note: The filing code that you enter determines the name of the component that is displayed in the 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 Documents pane. You will be directed to upload another document for your filing.

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

#### Figure 8.11 – Documents Pane

Not Selected		Selected		
test.pdf	→ 🗊			
Academic_Calendar	→ 🗊			
	Drag files here of	BROWSE		
	Drag mes here of	BROWSE		
Maximum Filesize: 50.00 MB				
Supported File Types: TIFF Files (TI			() Word 97/XP File (DOC)	Portable
Document File (PDF) XML Documer	nt (XML) Windows Media File	(WMV) MPEG (MPEG)		

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

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

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

BROWSE

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

Note: If you want to delete a document that yo	ou previously uploaded, click .
16. After you have added all of your lead documents,	, click .
17. If you have attachments to add to the filing, click	SELECT DOCUMENTS in the <b>Attachments</b> section.
18. If you want to add security to any of the documen	its, select an option from the <b>Security</b> drop-down list.
19. If you want to add another filing, click . Ther	n, repeat the same steps for the next filing.
20. After you have added all of the filings, click either	SERVICE -> SKIP TO FEES

## **Entering Payment Information**

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

Ξ· 🐝 EFILE QA 01 - EFM QA1 Fees - Draft # 4312	@-	<b>0</b> - <b>#</b> -	<b>⊙</b> - ⊕- <u></u>
Preload Documents Case Parties Filings Service Fees Summary			
Pro se-fees			
Use Existing Payment Account O Create New Payment Account			
Payment Account *			
Party Responsible for Fees Select			
Filer Type			
Select +			
← SERVICE SAVE DRAFT AND EXIT			



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

To enter the payment information for your filing:

- 1. Select one of the payment options:
  - If you have already created a payment account, select the Use Existing Payment Account option. Then, continue to Step 2.

i -

 If you do not have an existing payment account created, select the Create New Payment Account option. The Create New Payment Account window is displayed. Assign a name to the new payment account. Then, select the account type:

CREATE WAIVER

- For a waiver account, click . Then, continue to step 3.

to view the case number or draft number.

- For a credit card or bank account, click window is displayed. Complete the fields in the *Enter Information* window for the type of account that you want to create. Then, click Continue and go to step 3.

Note: For detailed information on how to complete the fields in the *Enter Information* window, refer to Adding a Credit Card Payment Account, page 27 and Adding an E-Check Payment Account, page 30.

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

SEARCH if you want to search for a party.

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

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.

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



The fees for the filing are displayed.

nents Case Parties Filings Service Fees Summary		
ig Payment Account O Create New Payment Account	Abstract Of Judgment	^
Credit Card × 👻	Filing Fee	\$5.00
		Subtotal \$5.00
Frees # SEARCH		
÷ SEARCH	\$ Optional Service Fees	^
\$	Certified Copies (\$5.00 x 1)	\$5.00
		Subtotal \$5.00
	Service Fees	~
HI CALCOLATE FEES	Service Fees	<u>^</u>
	Total Service Fees	\$1.00
	Convenience Fee	\$1.00
	Total Court Service Fees	\$1.00
		Subtotal \$3.00
		Grand Total \$13
		Grand Total \$13

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.

≡• 🤹 EFILE QA 01 - EFM QA1 Fees - Draft # 4312 🚯 •	<b>0-</b> •	<b>⊕</b> - Ⅲ-	•
Preload Documents Case Parties Filings Service Fees Summary			
Pro se-fees			
Use Existing Payment Account O Create New Payment Account	🛓 Abstract Of Judgment		^
Payment Account *			
Mastercard Credit Card X V	Filing Fee		\$5.00
Party Responsible for Fees 🗰		Subtotal	\$5.00
James Doe	\$ Optional Service Fees		~
	Optional Service rees		
Filer Type Default	Certified Copies (\$5.00 x 1)		\$5.00
		Subtotal	\$5.00
CALCULATE FEES	Mail Service Fees		^
	Total Mail Service Fees		\$6.00
		Subtotal	\$6.00
	📥 Service Fees		^
	Total Service Fees		\$1.00
	Convenience Fee Total Court Service Fees		\$1.00 \$1.00
	Total Court Service Fees	Subtotal	
		Subtotal	\$3.00
		Grand Tota	I \$19.00
		_	
← SERVICE SAVE DRAFT AND EXIT		SUN	MMARY →

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



6. Review the filing fees, and then click

SUMMARY ->

## 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.

oad Documents Case Partie	s Filings Service Fees Summary	,			
catoos ekalb County - Superior Court	Citegory Citel		Type Amended Limited Partnership	1	
Parties				Show All	Agreements Case Parties
ilings				1	Filings Service
Filling Type eFile Only component Lead Document Deventiad Version Original	Pang Claim Acknowledgment Source Name Academic_Calendar_Fall_2019 (1) pdf	Client Ref # Description Acknowledgment	r forg Description Security		Fees
Auto Generated Filings					
Filter Type eFile Only Comparent Lead Document Preview Document Proview	Filing Cade Case Initiation Form Source Name Civil Domestic Filing Form2.pdf	Client Ref # Discription	riting Description Case Information sheet accent Superior Court Document		
Filing Type effile Only Composet Lead Document Preview Preview	Firing Cade Verification Document Name SUMMONS for Doris Defendant.pdf	Chart Ref # Description	Plang Description Summonis for Davis Defendant Escript Superior Court Document		
Service				1	
ees				1	
yment Account auren's Waiver	Filing Attorney Frank Castle	Party Responsible for Fees Doris Defendant	Filer Type		

#### Figure 8.17 – Sample Summary Page

- 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,

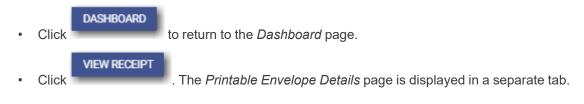


The *Envelope Submitting* window is displayed.

En	velope Submitting	×
	Envelope #27878 is submitting.	
	$\searrow$	
	DASHBOARD VIEW RECEIPT START NEW ENVELOPE	

Figure 8.18 – Envelope Submitting Window

5. In the *Envelope Submitting* window, do one of the following:



EFILE QA 01 - EFM QA4 Printable Envelope Details				@-	<b>.</b> -	<b>.</b>	±	
Details - Envelope # 27878								
Case								
FS QA 2017	Category ########		Туро ********					
Parties								Show All
Filings								
Ing Code Petition (Open Case)	Client Ref #	Filing Description Summons for Amy Doe		Submitted Date 08/05/2021 11:44 AM				
lubmitted	Review Date							
ead Document	Document Name SUMMONS for Amy Doe.pdf	Description		Public (T)				
riginal								
ing Code action - Initial Only	Client Ref #	Ring Description Case Information		Submitted Date 08/05/2021 11:44 AM				
tatus Submitted omponent	Review Date Document Name	Description		Security				
Lead Document	Civil Domestic Filing Form1.pdf	Unicolyticut.		Public (T)				
Driginal								
iling Code Acknowledgement tatus	Client Ref #	Filing Description		08/05/2021 11:44 AM				
sates Submitted	Review Date Document Name	Description		Security				
ead Document	document.pdf	uniter and a second sec		Confidential (G)				
Driginal								
Service								
ount 0 None								
Fees	Filing Attorney	Party Responsible for Pees		Filer Type				
auren's Waiver	Abby Carmichael Transation Response	Joanne Doe Transaction Amount		Default Transaction ID				
		\$0.00						D Hel
		vier Technologies, Inc.   All Rights Reserved   Version: 0.0.0.1937						Total 30.00

Figure 8.19 – Sample Printable Envelope Details Page

View the envelope details, and then close the tab. Then, in the Envelope Submitting window,



• Click **x** to close the *Envelope Submitting* window. The *Dashboard* page is displayed.

## Viewing the Envelope Details for Service of Process Cases

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

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

#### To view the envelope details:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.

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

Figure 8.20 – Filing History Page

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

The envelope details are displayed.

Details - Envelope # 26465				FRINT CLOSE
Case Looning OFS QA 2017	Congoy Civil		1994 Breach Of Contract	
Derrage Amount Under \$1000				
Parties Coard 2				Show All
Filings				
FilmgCode Action - Initial Only State	Client Ital # Station Date	Filing Development Case Information	54/mited Date 07/20/2021 5:44 PM	
Submitted Composed Lead Document Dominal Vesen Original	Doorner Here Civil Domestic Filing Form.pdf	Description	Security Public (T)	
Film Cole Acknowledgement State	Client Truf #	Files Decospilar	Salaminad Date 07/20/2021 5:44 PM	
Shana Submitted Companiet Lead Document Dominal Venian	Doorner Date Doorner Hann redsotthis.pdf	Description	Security Confidential (G)	
Original				
FilingCode Petition (Open Case) Status	Client Haf # Sheiver Date	Hing Description Summons for Jane Doe	Szárrihad Date 07/20/2021 5:44 PM	
Submitted Corsponer Lead Document Dostifiad Imman Original	Document Name SUMMONS for Jame Doe, pdf	Description	Security Public (T)	
Service				
Carro None				
Fees				
Perret Assess Laurer's Waiver Order ID	Hing Alterney Abby Carmichael Insreaction Response	Verty frequentiles for fease Jame Doe Transation Annual \$0.00	tike type Default Terracion 10	
				Total \$0.00 Waiver Selected
				CLOSE

#### Figure 8.21 – Sample Envelope Details Page

4. Click to print a copy of the envelope details.

# **9** Redaction Feature

#### Topics covered in this chapter

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

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

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

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

The following data is automatically redacted:

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

## Entering a Filing with Redacted Documents

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

#### 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.

START FILING

EFILE QA 01 Start Filing	8-	<b>.</b>	<b></b> -	£
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loaton * Select •				
Location is Required.				
← DASHBOARD				
2				
				O Help

Figure 9.1 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

EFILE QA 01 Start Filing	Ø• ⊕• Ⅲ• ≜
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Leater * OFS MockCMS *	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHBOARD	
₽ ₽	
	O Help
Figure 9.2 – Start Filing Page with Case Papes Display	ad a

Figure 9.2 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Preload Documents page is displayed.

=- 🤸 EFILE QA 01 - EFM QA4	4 Preload Documents - Draft # 4279 () -			<b>?</b> -	•-	<b></b> -	A
Preload Documents Case	Parties Filings Service	Fees Summary					
		Drag files here or	BROWSE				
Maximum Filesize: 50.00 MB Supported File Types: MPEG (MPEG) Portable	e Document File (PDF) TIFF Files (TIFF TIF) Windows	Media File (WMV) Word 2007 File (DOCX) Word 97/XP	File (DOC) WordPerfect File (WPD) XML Document (XML) .				
SAVE DRAFT AND EXIT							CASE INFORMATION ->

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

#### BROWSE

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

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

😑 - 🤸 BFLE GA 01 - BFM GA11 Pieload Documents - Draft # 7646 0 -	<b>?</b> -	<b>.</b> -	<b></b> -	•
Preload Documents Case Parties Filings Service Fees Summary				
redactthis.pdf				
Crag files here or BROWSE				
Maximum Filesian 50.00 MB				
Supported File Types: MPEG (MPEG) Portable Document File (PDP) TIFF Files (TIFF TIP) Windows Media File (WMV) Word 2007 File (DOCX) Word 97/XP File (DOCX) WordPerfect File (WPD) XML Document (XML) .				
SAVE DRAFT AND DXT		С	ASE INFORM	ATION ->

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



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

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

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

CASE INFORMATION ->

to continue with your filing.

The Case Information page is displayed.

Parties 🗲

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

The Parties page is displayed.

7. Click

FILINGS ->

SERVICE ->

FFFS

SUMMARY ->

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

The Fees page is displayed.

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

Submission Agreements					
I agree that this filing is in compliance with	the Rules for E-Filing				
ou must accept the Submission Agreements					Agreements
Case				1	Case
ation	Category	Туре			Parties
FS QA 2017	Family		Of Property		Filings
				~ /	Service
arties				Show All	Fees
8000 ) M					SUBMIT
ilings				1	300001
Filing Type eFile Only	Filing Code Acknowledgement	Client Ref #	Filing Description		Calculating Fees
Component Lead Document	Document Name	Description	Security Confidential (G)		Calculating Pees
Download Version	Academic_Calendar_Fall_2019 (1).pdf	Academic_Calendar_Fall_2019 (1).pdf	Confidential (G)		
Original					
Service				1	
unt: 0					
one					
ees				1	
yment Account	Filing Attorney	Party Responsible for Fees	Filer Type		
auren's Waiver	Perry Mason	George Doe	Default		
				Waiver Selected	
FEES SAVE DRAFT AND EXIT				SUBMIT	

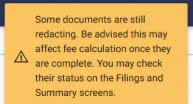
#### Figure 9.6 – Sample Summary Page

EDIT REDACTIONS

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

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

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



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

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

SUBMIT



to save your changes and close the viewer.

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

submission agreements (if applicable), click

## **Deleting a Redaction**

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

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

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

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

1. Right-click the specified redaction.

The Annotation Notes dialog box is displayed.



Figure 9.8 – Annotation Notes Dialog Box

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

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

2. Click to delete the redaction.

The Delete Annotation dialog box is displayed.

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

Figure 9.9 – Delete Annotation? Dialog Box

3. Click to delete the specified redaction.

## Working with an Existing Redaction

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

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

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

To work with an existing redaction:

- 1. Turn off the manual redaction capability by clicking
- 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).

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

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

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



Figure 9.10 – Sample Thumbnail Pane

The following table describes the icons in the thumbnail pane.

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

# **10** File into an Existing Case

#### Topics covered in this chapter

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

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

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

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

SEARCH

SEARCH

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

EFILE QA 01 Filing History					<b>0</b> -	<b>.</b>	<b></b> -	±
Filing History Filter	FILING HISTORY FILI	NG DRAFTS						18 Result(s) Page 1 of 1
Status	Case # CC-							
<ul> <li>All Statuses</li> <li>Accepted</li> </ul>	Envelope # 212360 Submitte	ed 09/03/2020 12:11 PM by Pro Se						
Cancelled	Filing Status	Filing Code	Filing Type	Filing Description			Client Ref #	
<ul> <li>Receipted</li> </ul>	Accepted	Acknowledgement	eFile Only					
⊖ Served								
Returned     Submitted	Envelope #	210580						
) Submitting		ed 08/27/2020 3:15 PM by Pro Se						
Location								
Eccation	Filing Status	Filing Code	Filing Type	Filing Description			Client Ref #	×
Any Location +	Submitted	Application	eFile Only					
Case / Envelope Number	Envelope #	210570						
Case Number		ed 08/27/2020 3:13 PM by Pro Se						
Envelope Number								
Date Range	Filing Status Submitted	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description			Client Ref #	×
Anytime								
<ul> <li>Last Month</li> <li>Last Week</li> </ul>	Case # CC-	20-1071						🖻 🗈 🗄
O Last Two Days		20-1971 ed 08/26/2020 4:57 PM by Pro Se						
O Today	Envelope # 209496 Submitte	ed 08/20/2020 4.57 PM by Plo Se						
O Pick a Custom Range	Filing Status	Filing Code	Filing Type	Filing Description			Client Ref #	
From Date	Submitted	Affidavit	eFile Only					×
To Date	Envelope #	209495						
RESET FILTER		ed 08/26/2020 4:55 PM by Pro Se						
HEICK	chreiope = 209490 Submitte	20 00; 20; 2020 9:00 FM 0y FT0 0E						
	Filing Status	Filing Code	Filing Type	Filing Description			Client Ref #	Q Help
	Submitted	Abstract Of Judgment	eFile Only					Help

Figure 10.1 – Example of a Filing History Page

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

2	Click	CASE INFORMATION $\rightarrow$	to enter case information, or click	SKIP TO FILINGS $\rightarrow$	if you want to
<u> </u>		ectly to the <i>Filings</i> page.			n you want to
			ectly to the <i>Filings</i> page, the case . The ability to add a new party to		
	lf you	ir system is configured	with this capability,	is displayed on the <i>I</i>	Parties page.
3.	On th	e <i>Filings</i> page, select the	filing type from the <b>Filing Type</b> dro	p-down list.	
4.	Selec	t the filing code from the <b>I</b>	Filing Code drop-down list.		
5.	Туре	a description in the <b>Filing</b>	Description field.		
6.	Туре	a client reference number	in the Client Reference Number	field.	
7.	lf you	have any comments for t	he court regarding the filing, type th	nem in the <b>Comments</b> t	t <b>o Court</b> field.

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

The **Optional Services** tab is displayed.

9. To select the applicable optional services, click

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

÷

GO TO OPTIONAL SERVICES

Note:	If you decide that you o	do not want to use an optional service that you have selected, click
10. Click type a	GO TO COMMUNICATION	to specify the recipient of the courtesy or preliminary copies. You must he recipient.
	ASSOCIATED PARTIES	

11. Click

to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

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

Figure 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.

		SELECT DOCUMENTS		
. In the Do	cuments pane, c			
ocuments*				
ooumento				
	Name	Actions	Description	Security
Component Lead Document	Name	Actions SELECT DOCUMENTS	Description This document is required.	Security

#### Figure 10.3 – Documents Pane

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

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

28. Click

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.

File into Existing Case		×
Location *		
Select	÷	
Location is Required.		
Search for a Case by Case Number Party Name		4
Case number format is default.		•
Case Number \star		
Case Number is Required.		
		CANCEL SEARCH

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

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

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

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

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

SEARCH 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.

≡ 🐝 eFile Case Search			<b>?</b> - (	)- III-	▲ we conserve the conserve
Location: OFS QA 2014 - Court at Law Case Nu	imber: CC-19-1245				
Case # CC-19-1245					
Location OFS QA 2014 - Court at Law	Case Category Civil	Case Type Landlord / Tenant			
← DASHBOARD					REFINE SEARCH



3. Click to file into the case.

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



initial case remains the same. The ability to add a new party to an existing case is configurable.



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.

GO TO OPTIONAL SERVICES

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

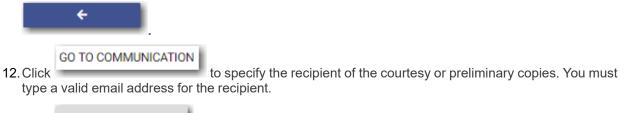
The **Optional Services** tab is displayed.

11. To select the applicable optional services, click

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

⇒

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



ASSOCIATED PARTIES

13. Click

------ to associate parties with the filing.

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

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

Figure 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 . 18. In the Documents pane, click .

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

Figure 10.9 – Documents Pane

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

Select document(s) for Lead Document ×	
Not Selected Selected	
test.pdf →	
Academic_Calendar →	
C Drag files here or BROWSE	
Maximum Filesize: 50.00 MB Maximum Filesize: 50.00 MB Supported File Types: TIFF Files (TIFF TIF) WordPerfect File (WPD) Word 2007 File (DOCX) Word 97/XP File (DOC) Portable Document File (PDF) XML Document (XML) Windows Media File (WMV) MPEG (MPEG) .	
CANCEL SAVE	
Figure 10.10 – Select document(s) for Lead Document Window	
19. Click to look for a document to upload. Then, click to select the	e lead document.
Note: If you want to delete a document that you have uploaded, click	
20. After you have added all of your lead documents, click	
21. If you have attachments to add to the filing, click select documents in the Attach	ments section.
22. If you want to add security to any of the documents, select an option from the Secu	r <b>ity</b> drop-down list.
23. If you want to add another filing, click NEXT FILING . Then, repeat the same step	s for the next filing.
24. After you have added all of the filings, click either or SKIP TO FEES	
25. On the <i>Service</i> page, add service contacts if applicable. Then, click	
26 On the Face wave, called the neumant account from the Deumant Account dware do	

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

Search Cases

to

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

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

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

30. Click

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

32. When you are satisfied with your filing, click

## Filing into an Existing Case from the Dashboard Page

To file into an existing case from the Dashboard page:

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

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

#### The File into Existing Case window is displayed.

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

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

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

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

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

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

SEARCH 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.

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



3. Click to file into the case.

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



initial case remains the same. The ability to add a new party to an existing case is configurable.

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

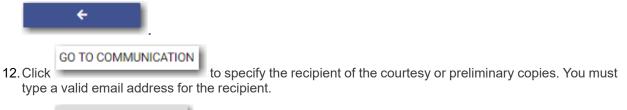
The **Optional Services** tab is displayed.

11. To select the applicable optional services, click

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

⇒

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



ASSOCIATED PARTIES

13. Click

---- to associate parties with the filing.

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

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

Figure 10.14 – Associate Parties to this Filing Window

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

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

17. Click . 18. In the Documents pane, click .

D	ocuments*				
С	component	Name	Actions	Description	Security
Ŀ	ead Document		SELECT DOCUMENTS	This document is required.	
A	ttachments		SELECT DOCUMENTS		

Figure 10.15 – Documents Pane

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

Select document(s) for Lead Document ×	
Not Selected Selected	
test.pdf → i	
Academic_Calendar	
C Drag files here or BROWSE	
i	
CANCEL SAVE	
Figure 10.16 – Select document(s) for Lead Document Window	
	select the lead document.
Note: If you want to delete a document that you have uploaded, click	
20. After you have added all of your lead documents, click	
21. If you have attachments to add to the filing, click	he 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 s	same steps for the next filing.
24. After you have added all of the filings, click either	IP TO FEES
25. On the <i>Service</i> page, add service contacts if applicable. Then, click	s →
	and always allowed link and allowed h

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

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

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

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

30. Click

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

32. When you are satisfied with your filing, click

## Filing into a Non-Indexed Case

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

To file into a non-indexed case:

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

The File into Existing Case window is displayed.

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

Figure 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.

Location *	
Select	÷
Location is Required.	
Case number format is default.	<b>U</b>
Case Number 🗚	
Case Number is Required.	



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.

E 🤹 eFile Case Search	<b>?</b> -	<b>.</b>	<b></b> -	±
Location: OFS Non-Integrated Case Number: CC-145333				
No results found. Select 'Refine Search to change the search criteria.				
If your case is not listed below, you are attempting to effle into a case that has yet to receive an electronic submission and the case is not searchable from the court's case management syst required to manually input the case information. Any additional filings on this case will not require the manual data entry.	em. You a	re still able	to file into 1	this case, but you will first be
			I DOM	IT SEE MY CASE REFINE SEARCH

Figure 10.19 – Case Search Window with No Results Found

5. To continue, click

I DON'T SEE MY CASE

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

I Don't See My Case				×
You are about to start a manual subsequ	ent filing at the following location. Please be sure you have	filtered by case number at the proper location or your filing could l	be delayed by improper numbering.	
Location OFS Non-Integrated	Case Number CC-145333	Cases Found 0		
BACK TO RESULTS			I UNDERSTAND, CONTINU	UE

Figure 10.20 – I Don't See My Case Window

I UNDERSTAND, CONTINUE

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.

🚍 🛛 🤹 EFILE QA 01 - EFM QA1 Case Information - Draft # 7587 - Case # CC-145333 🕕 -	<b>?</b> -	<b>.</b>	•	
Preload Documents Case Parties Filings Service Fees Summary				
THE CONTRACT OF DESCRIPTION OF DESCRIPTION				
Care Number * C/-145333				
UC-145333				
Location * Case Category *				
OFS Non-Integrated x 👻 Select				Ŧ
Case Category is Required.				
Cone Type 🛊				
Select 👻				
Case Type is Required.				
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT			P	ARTIES 🗲

Figure 10.21 – Case Information Page

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

#### Parties 🗲

10. Click

to save your work and continue.

- 11. Continue entering case information on the following pages until you reach the Summary page.
- 12. Review your filing. When you are satisfied with the information you have entered, click

SUBMIT

## Creating a Service Only Filing

#### To create a Service Only filing:

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

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

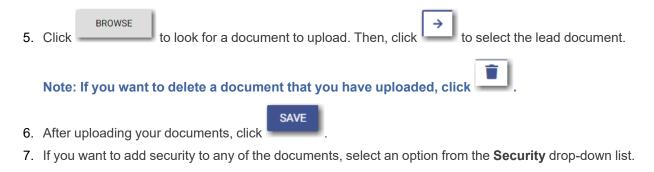
3. On the Filings page, select Service Only from the Filing Type drop-down list.

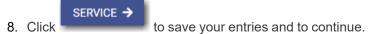
4. In the Do	ocuments pane,	SELECT DOCUMENTS		
Documents*				
Component	Name	Actions	Description	Security
Lead Document		SELECT DOCUMENTS	This document is required.	
Attachments		SELECT DOCUMENTS		

Figure 10.22 – Documents Pane

elect document(s) for Lead Do	cument		×
Not Selected test.pdf → [ Academic_Calendar → [	Selected		
🚯 Drag file			
Maximum Filesize: 50.00 MB Supported File Types: TIFF Files (TIFF TIF) WordPerfec Document File (PDF) XML Document (XML) Windows N	File (WPD) Word 2007 File (DOCX) Word		
		CANCEL SAVE	
jure 10.23 – Select Docur	nent(s) for Lead Do	ocument Windo	ow

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





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

10. From the service method drop-down list for each service contact, select the service method to use.

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

Mail	-
Certified Mail	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Mail	
Eserve	

Figure 10.24 – Sample Service Method Drop-Down List

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

EL BRITISE CONSIGNATION	1811					
Service Contacts:						
FROM MY SERV	ICE CONTACT LIST	ADD NEW CONTACT				
arties		Service Conta	acts 🗹 Serve all			Show
ipe: laintiff	Name: john adams	Serve	Service Method	Name	Email/Mail	Coun
		No service co	ontacts			
<sup>ipe:</sup> efendant	Name: mary adams	Serve	Service Method	Name	Email/Mail	Coun
		No service co	ontacts			
<sup>pe:</sup> pplicant	Name: Aaron Lopez	Serve	Service Method	Name	Email/Mail	Cour
		No service co	ontacts			
pe: ppellant	Name: Tim Mitz	Serve	Service Method	Name	Email/Mail	Cour
		No service co	ontacts			
ipe: IA	Name: Other Service Contacts	Serve	Service Method	Name	Email/Mail	Coun
Serve all 'other' conta	acts	$\checkmark$	Eserve	mxunczog ajilpwjs	mxunczog.ajilpwjs@tylertech.com	



11. Click FEES → 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.

E 🌼 eFile Service Contacts			Ø- (	⊕• III• ≜ managana ana•
First Name	Last Name	Email Address	FILTER RESET	ADD SERVICE CONTACT
First Name	Last Name	Email Address		Actions
Test	Contact	testcontact@gmail.com		
Susie	Potter	susiep@gmail.com		1
Pro	Se	gmail.c	om	1
Patte	Smith	patte.smith@gmail.com		1
Russ	Smith	russ.smith@gmail.com		1
Tonia	Smith	tsmith@gmail.com		1
Previous 1 Next				6 Results Page 1 of 1

Figure 11.1 – Service Contacts Page



### Additional fields are displayed.

You must provide either an email address or a physical address.			
Add To My List	Add to Public List		
First Name ¥	Middle Name		Last Name *
First Name is Required.			Last Name is Required.
Email *	Phone Number		
Email Is Required.			
Country United States ÷			
Address Line 1 *		Address Line 2	
Address Line 1 is Required.			
Cny *	State Select	+	Zip Code *
City is Required.	State is Required.	•	Zip Code is Required.
			CANCEL SAVE

Figure 11.2 – Service Contacts – Additional Fields

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

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

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

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

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

#### The default selection is United States.

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

13. After you have entered the required information, click

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



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

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



1. On the Service page, click

The My Service Contacts window is displayed.

My Se	ervice Contacts	Associated Parties		
First Name		Last Name	Email FILTER RESU	ET
	Test Contact Susie Potter Pro Se Patte Smith Russ Smith		testcontact@gmail.com susiep@gmail.com @gmail.com patte.smith@gmail.com russ.smith@gmail.com	
First	Previous 1	Next Last	5 Result(s) Page	1 of 1
			CANCEL ASSOCIATED PARTIE	S

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.

ASSOCIATED PARTIES

FILTER

After you have selected the contacts for your filing, click

The Associated Parties window is displayed.

	Associated Parties		
Select one or more parties to	o associate with the servic	e contacts.	
Select Parties	<b>.</b>		
ected Service Contacts:			
ected Service Contacts: Test Contact		testcontact@gmail.com	

Figure 11.4 – Sample Associated Parties Window

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

SAVE

Parties drop-down list, and then click

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

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

Mail	۹.
Certified Mail	
Mail	
Eserve	

Figure 11.5 – Sample Service Method Drop-Down List

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

MY SERVICE CONTACTS

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

=- 🌾 erle	QA 01 - EFM QA1 Service - Draft # 4312	() ~			<b>8</b> -	<b>.</b>	•	-
Preload Documents	Case Parties Filings	Service Fees	Summary					
Se service contact co	ntent							
dd Service Contacts:								
FROM MY SER	VICE CONTACT LIST	BLIC LIST	W CONTACT					
Parties			Service Contacts					Show Al
Type: Petitioner	Name: James Doe		Name	Email/Mail				Count: C
			No service contacts					
Type: Respondent	Name: Julia Doe		Name	Email/Mail				Count:
			Josephine Smith	josephine.smith495@gmail.com				1
Type: NA	Name: Other Service Contacts		Name	Email/Mail				Count: C
			No service contacts					
← FILINGS SAVE	DRAFT AND EXIT							FEES -

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

click

FROM PUBLIC LIST

The Public Service Contacts window is displayed.

Public Serv	ice Contacts As	ssociated Parties			
Fill in at lea	st one field and click FIL	TER to display public service	ce contacts.		
First Name	Last Name	Email	Firm	FILTER	RESET
			CANCEL	ASSOCIATED	PARTIES

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.

FILTER

Public	Service Contacts Associate	d Parties	
The n	naximum of 100 public service contacts	s were return	ned.
First Name a	Last Name	Email	Firm FILTER RESET
	xdbbqnmp.update qjnijdqt.update xsncpywh.update hoopjatu.update		xdbbqnmp.qjnijdqt@tylertech.com xsncpywh.hoopjatu@tylertech.com
	xvbmornb.update tawnxbpw.update xyjagryh jvezoxrv		xvbmornb.tawnxbpw@tylertech.com xyjaqryh.jvezoxrv@tylertech.com
	ydfkwmsc.update zadxmwvs.update yfxbhtia gejdvkgn		ydfkwmsc.zadxmwvs@tylertech.com yfxbhtia.qejdvkgn@tylertech.com
	yvemzhts.update lispdguk.update		rjrxykyo.ykwwddld@tylertech.com
	zclyrpby.update bvfbzkcd.update zicpsjbf.update whlrcqyl.update		zclyrpby.bvfbzkcd@tylertech.com zicpsjbf.whlrcqyl@tylertech.com
	zqwlczsm.update xwoymgnm.update		zqwlczsm.xwoymgnm@tylertech.com
First	Previous 1 2 3 4 5	6 7 N	ext Last 100 Result(s) Page 7 of 7
			CANCEL ASSOCIATED PARTIES

Figure 11.8 – Sample Public Service Contacts List

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

ASSOCIATED PARTIES

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

The Associated Parties window is displayed.

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

Figure 11.9 – Sample Associated Parties Window

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

SAVE

Parties drop-down list, and then click

ESO-FS-200-4494 v.13

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

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

Mail	-
Certified Mail	
Mail	
Eserve	

Figure 11.10 – Sample Service Method Drop-Down List

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

PUBLIC SERVICE CONTACTS

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.

· ·	E QA 01 - EFM QA1 Service - Draft # 4312 () ▼				L
reload Documents	Case Parties Filings Service	Fees Summary			
e service contact co	ontent				
Service Contacts:					
신스 FROM MY SEF	RVICE CONTACT LIST	ADD NEW CONTACT			
arties		Service Contacts			~
					Show
<sup>pe:</sup> etitioner	Name: James Doe	Name	Email/Mail		Count
eutioner	James Due	No service contacts			coun.
		No service contacts			
rpe:	Name:	Name	Email/Mail		^
espondent	Julia Doe				Count
		Josephine Smith	josephine.smith495@gmail.com		1
rpe:	Name:	Name	Email/Mail		~
14	Other Service Contacts				Count
		No service contacts			
FILINGS SAV	E DRAFT AND EXIT				FEES

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

## Adding a New Service Contact to a Filing

You can add a new service contact to a filing.

To add a new service contact to a filing:

1. On the Service page, click

ADD NEW CONTACT

The Add Service Contact window is displayed.

Add Service Contact			
Parties Select Parties		•	
Add To My List	Add to Public List		
First Name ≭	Middle Name		Last Name ≭
First Name is Required.			Last Name is Required.
Email \star	Phone Number		
Email is Required.			
Country United States			
Address Line 1		Address Line 2	
City	State		Zip Code
	Select	\$	
			CANCEL SAVE

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.

- 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

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

The Associated Parties window is displayed.

Publ	lic Service Contacts	Associated Parties			
Sele	ect one or more parties to	associate with the service co	ontacts.		
arties	Select Parties	·			
Selecte	ed Service Contacts:				
~	xyjaqryh jvezoxrv		xyjaqryh.jvezoxrv@tylertech.co	m	
PUE	BLIC SERVICE CONTACTS			CANCEL	SAVE
		-			

Figure 11.13 – Sample Associated Parties Window

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

down list, and then click

Note: If the service contact you are adding is not associated with any party on the case, select "Other: No party association" from the drop-down list in the *Associated Parties* window.

SAVE

ASSOCIATED PARTIES

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

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

Mail	٩
Certified Mail	~~
Mail	
Eserve	

Figure 11.14 – Sample Service Method Drop-Down List

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

	: QA 01 - EFM QA1 Service - Draft # 4312 🕕 -			<b>8</b> -	۰.	-	A
Preload Documents	Case Parties Filings Service	Fees Summary					
ro Se service contact co	ontent						
Add Service Contacts:							
FROM MY SEE	RVICE CONTACT LIST	ADD NEW CONTACT					
Parties		Service Contacts					Show All
Type: Petitioner	Name: James Doe	Name	Email/Mail				Count: 0
		No service contacts					
Type: Respondent	Name: Julia Doe	Name	Email/Mail				Count: 1
		Josephine Smith	josephine.smith495@gmail.com				1
Type: NA	Name: Other Service Contacts	Name	Email/Mail				Count: 0
		No service contacts					
← FILINGS SAV	E DRAFT AND EXIT						FEES →

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 5
- 1. On the Dashboard menu, click My Service Contacts.

The Service Contacts page is displayed.

E 🐝 eFile Service Contacts				<b>9</b> -	<b>- Ⅲ</b> -	L
First Name	Last Name	Email Address	FILTER RESET			ADD SERVICE CONTACT
First Name	Last Name	Email Address				Actions
Test	Contact	testcontact@gmail.t	com			1
Susie	Potter	susiep@gmail.com				1
Pro	Se	gm	nail.com			1
Patte	Smith	patte.smith@gmail.t	com			1
Russ	Smith	russ.smith@gmail.c	com			1
Tonia	Smith	tsmith@gmail.com				1
Previous 1 Next						6 Results Page 1 of 1

Figure 11.16 – Service Contacts Page

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

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

SAVE

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

## Viewing Attached Case List of Service Contacts

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

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

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

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

The Service Contacts page is displayed.

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



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

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

Service Contact Attached Cases			
Case Number	Location	Case Description	
CC-19-226	OFS QA 2018		
	OFS QA 2017		
	OFS QA 2017		
Download Attached Cases			
		CLO	SE

Figure 11.18 – Service Contact Attached Cases Window

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

The attached cases are listed on the Excel spreadsheet.

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

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

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

## Updating Information for a Case Service Contact

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

To update the information for a case service contact:

1. On the Dashboard menu, click Filing History.

The *Filing History* page is displayed.

≡ state Filing History					@· ⊕· Ⅲ·	L PROBERTI CORTAGONAL CON-
Filing History Filter	FILING HISTORY FILIN	G DRAFTS				2 Result(s) Page 1 of 1
Status	Envelope # 1					
All Statuses     Accepted     Cancelled     Receipted	Filing Status Submitted	01/28/2020 3:53 PM by Pro Se Filing Code Acquittal	Filing Type eFile Only	Filing Description	Client Ref #	8
<ul> <li>Receipted</li> <li>Served</li> <li>Returned</li> <li>Submitted</li> <li>Submitting</li> </ul>	Envelope # 1 Envelope # 165149 Submitted	165149 01/24/2020 9:22 AM by Pro Se				
Location	Filing Status Reviewed	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description	Client Ref #	
Any Location +	Previous 1 Next					2 Result(s) Page 1 of 1
Case Number / Envelope Number						
Case Number						
Envelope Number						
Date Range						D
Anytime     Last Month     Last Week     Last Tweek     Today     Pick & Custom Range     From Date     To Date     RESET FILTER						

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.

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

Figure 11.21 – Update Service Contact Window

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



## **Deleting a Service Contact**

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

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

The Service Contacts page is displayed.

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

### Figure 11.22 – Service Contacts Page

- 2. Locate the name of the service contact that you want to delete.
- 3. Click to immediately delete the service contact, or click to first view the cases that are attached to that service contact.

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

# **12** Templates

#### Topics covered in this chapter

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

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

## Adding a Template

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

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

The *Templates* page is displayed.

≡ 🐝 eFile Templates			<b>⋳</b> - ⊕-	🛛 • 🔺 TROBETTA COLUMNATION •
Filter Type My Templates ¢	Name	FILTER RESET		ADD TEMPLATE
Favorite	Name	Туре		Actions
*	Tyler Group	New Case		
☆	My Name change template	New Case		
☆	Existing Case Template	Existing Case		A :
☆	Template #5	New Case		🖻 🖊 🗄
☆	Thursday Template	New Case		1
	Pro Se Template	New Case		1
습	Thursday Template #2	New Case		🖻 🖍 🗄
	Current Case Template #2	Existing Case		// E
☆	Template #3	New Case		

#### Figure 12.1 – Templates Page



A pane is displayed.

Favorite	Name	Туре		Ac	ctions
☆		New Case		<u> </u>	Ŧ
Favorite	Name * Name is Required.		New Case O Existing Case		
				CANCEL SAVE EDIT DETAILS	.s <b>→</b>

#### Figure 12.2 – Templates Pane

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

#### EDIT DETAILS 🗲

6. Click

to begin creating your template.

#### The Case Information page is displayed.

- 7. Enter as much information on this page as you want to use in your template.
- 8. Continue entering information on each page of the filing until you have the information that you want to use in your template.

Note: You can stop at any time and save the pages that you have completed. You do not have to create an entire case filing to save the entries as a template.

9. If you enter information on each page of the case filing, on the Summary page, click

SAVE TEMPLATE

EFILE QA 01 - EFM QA1           pad Documents         Case	Parties Filings Service Fees Su	mmary				
Case				1		
cation FS QA 2017	Category Family		Type Other Family Law Matters			
Parties				Show All	Case Parties Filings	
ilings				1	Service	
Filing Type eFile Only Component Lead Document Download Version Original	Filing Code Abstract Of Judgment Decomment Name Civil Domestic Filing Form1,pdf	Client hef # Description Abstract Of Judgment	Filing Description Security		SAVE TEMPLATE	I
Service				1		
ees				1		
yment Account auren's Waiver	Filing Attorney Perry Mason	Party Responsible for Fees Henry Ford	Filer Type Default			
				Waiver Selected		
FEES SAVE DRAFT AND EXIT				SAVE TEMPLATE		
					BACK TO TOP	D He

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.

= 🐝 eFile Templates				0- 0-	<b>⊕</b> - Ⅲ-	
<sup>Filter Type</sup> My Templates	Name		FILTER RESET			
Favorite		Name	Туре			Actions
*		Tyler Group	New Case			۱
☆		My Name change template	New Case			1
☆		Existing Case Template	Existing Case			<i>#</i>
☆		Template #5	New Case			۱
슙		Thursday Template	New Case			۱
습		Pro Se Template	New Case			🖻 🖍 🗄
습		Thursday Template #2	New Case			۱
습		Current Case Template #2	Existing Case			<i>i</i>
☆		Template #3	New Case			۱

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.

EDIT DETAILS →

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

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

SAVE AND EXIT

Your template is now updated and is listed on the Templates page and on the Dashboard page.

## Using a New Case Template

After a template has been created, you can use it to accelerate your filing.

To use a template that you previously created:

1. On the Dashboard menu, click Templates.

The Templates page is displayed.

= 🐝 eFile Templates				@- ⊕- Ⅲ	• <b>1</b> TRUE TRUE TRUE TRUE TRUE TRUE TRUE TRUE
<sup>ilter Type</sup> My Templates	Name		FILTER RESET		ADD TEMPLATE
Favorite		Name	Туре		Actions
*		Tyler Group	New Case		۱
		My Name change template	New Case		۱
		Existing Case Template	Existing Case		<i>d</i>
		Template #5	New Case		1
<u>ሰ</u>		Thursday Template	New Case		۱
		Pro Se Template	New Case		1
		Thursday Template #2	New Case		1
		Current Case Template #2	Existing Case		1
		Template #3	New Case		۱

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.

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

Figure 12.6 – Filing History Page

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

A drop-down list is displayed.

3. Click File Into Case With Template.

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

		Name		_
My Temp	lates 💠		FILTER RES	ET
Location, You can u template	/Type/Category matches use a template even if the	the case, each templa ere are mismatches. Th ch, we attempt to creat	Ind Case Category to your templates. If the temp te section will be created on the draft. The templates are listed in best match order. If you te the entire template, but your draft might not inc	u select a
Favorite	Name		Template Matches On	Actions
Favorite ☆	Name Current Case Templat	te #2	Template Matches On No matching case information <b>@</b>	Actions
			•	Actions

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 *Preload Documents* page. The fields that you previously entered when the template was created are auto-filled.

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



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

## Copying a Template

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

To copy an existing template:

1. On the Dashboard menu, click Templates.

The Templates page is displayed.

= 🐝 eFile Templates			<b>?</b> - ⊕- ∣	• • • • • • • • • • • • • • • • • • •
Filter Type Ny Templates	lame	FILTER RESET		ADD TEMPLATE
Favorite	Name	Туре		Actions
*	Tyler Group	New Case		۱
☆	My Name change template	New Case		🖻 🖉 🗄
☆	Existing Case Template	Existing Case		// E
☆	Template #5	New Case		1
☆	Thursday Template	New Case		1
☆	Pro Se Template	New Case		1
☆	Thursday Template #2	New Case		1
☆	Current Case Template #2	Existing Case		/
☆	Template #3	New Case		📂 🖍 🗄

Figure 12.8 – Templates Page

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

A drop-down list is displayed.

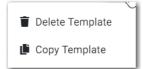


Figure 12.9 – More Options Drop-Down List

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.

#### SAVE

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

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

## **Deleting a Template**

You can delete a template that you no longer need.

#### To delete an existing template:

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

The Templates page is displayed.

to

EDIT DETAILS ->

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

:

Figure 12.10 – Templates Page

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

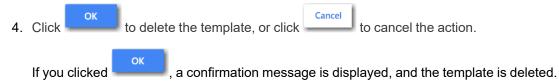
A drop-down list is displayed.



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''?



## **13** Filings

#### Topics covered in this chapter

- Copying the Envelope
- Viewing the Envelope Details
- Viewing Case Address Information in the Envelope Details
- Viewing Mail Service Fees in the Envelope Details
- Viewing Certified Mail Services Information in Envelope Details
- Resuming a Case Filing
- Deleting a Draft Filing
- Canceling a Filing

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

## Copying the Envelope

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

#### To copy an envelope:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.

≡ 🐝 eFile Filing History					<b>6</b> - ⊕-	<b>Ⅲ• ≜</b> €000000000000000000000000000000000000
Filing History Filter	FILING HISTORY	FILING DRAFTS				2 Result(s) Page 1 of 1
Status		e # 165244				
All Statuses	Envelope # 165244 S	ubmitted 01/28/2020 3:53 PM by Pro Se				
Accepted     Cancelled	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
O Receipted	Submitted	Acquittal	eFile Only			×
O Served O Returned	Envelope	e # 165149				
O Submitted	Envelope # 165149 S	ubmitted 01/24/2020 9:22 AM by Pro Se				
O Submitting	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Location	Reviewed	Acknowledgement	eFile Only	Hing Description	Client Her #	
Any Location +	Previous 1 N	lext				2 Result(s) Page 1 of 1
Case Number / Envelope Number	_					
Case Number						
Envelope Number						
Date Range						R
<ul> <li>Anytime</li> </ul>						
O Last Month O Last Week						
O Last Week O Last Two Days						
O Today						
O Pick a Custom Range						
From Date						
To Date						
RESET						

FILTER

Figure 13.1 – Filing History Page

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

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

3. Locate the envelope that you want to copy.





Figure 13.2 – More Options Drop-Down List

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

≡* 🐝 EFILE QA 01 - EF	A QA1 Preload Doc	uments - Draft	# 7597 🔹 🖥 🗝				<b>0</b> -	۰.	•	•
Preload Documents Case	e Parties	Filings	Service	Fees	Summary					
This is a copy of envelope 28	8501. Please verify	all information	i before submit	ting.						
						Crag files here or BROWSE				
Maximum Filesize: 50.00 MB Supported File Types: MPEG (MPEG) Po	ortable Document File (	PDF) TIFF Files (T	IFF TIF) Windows	Media File (WM	V) Word 2007 File (D	CX) Word 97/XP File (DOC) WordPerfect File (WPD) XML Document (XML) .				
SAVE DRAFT AND EXIT							SKIP TO FILINGS 🗲	→ c	ASE INFORM	ATION →

Figure 13.3 – Sample Preload 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

= · · EFILE QA 01 - EFM QA1 Summary - Drat	ft#7597 🕦 -				፼- ⊕- ≣- 🧯
Preload Documents Case Parties	Filings Service Fees Summary	•			
Submission Agreements I agree that this filing is in compliance with the filing is uncompliance with the filing is uncompliance with the file of the Submission Agreements.	Rules for E-Filing			Agree	
Case				Agree	nents
This is a copy of envelope 28501. Please verify a	all information before submitting.			Partie	
Location OFS QA 2017	Category Appellate		Type Appellate Case	Filings Servic Fees	
Parties				~ /	вмпт
Filings				1	
Filing Type eFile Only	Piting Code Petition (Open Case)	Cilent Ref #	Filing Description		
Component Lead Document Download Version Original	Decument Name BlankTest.pdf	Description BlankTest.pdf	Security Confidential (G)		
Service				1	
Count: 0 None					
Fees				1	
Paymont Account Waiver	Party Responsible for Fees Pro Se	Fier Type Default			
				Total \$0.00 Waiver Selected	
FEES SAVE DRAFT AND EXIT				SUBMIT BACK	ТО ТОР

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.

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

Figure 13.5 – Filing History Page

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

The envelope details are displayed.

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

Details - Envelope # 745447				PRINT CLOSE
Case Locate OFS MockCMS	Category Civil		nos Wrongful Death	
Parties Court 2				Show All
Filings				
ritru Tipe eFile Only Samma One 12/16/19 4:54 PM	rang Code Motions Submitted	Chart Ref #	Filing Description	
Composition Lead Document Download Virsion Original	Document Nome test.pdf	Description	ticonfry Confidential (T)	
Service				Hido at
marty ales weigisdg.com Status: Not Sent Associated Parties Nove	Service Method: Eserve			
Fees Parant Activit walver over 0	Pury Impossible for Feen Phil Defendant Transaction Regiona	Her Type Default Transition Annuel 90.00	Turiaction ID	
				Total \$0.00 Waiver Selected
				CLOSE

Figure 13.6 – Sample Envelope Details Page

4. Click **PRINT** to print a copy of the envelope details.

## Viewing Case Address Information in the Envelope Details

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

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

To view the case address information in the envelope details:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.

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

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.

Details - Envelope # 137873				PRINT CLOSE
Case Lacition OFS QA 2017 Case Address 555 Main Street Dallas, TX 75220 US Dallas	Category Civil		Type Notice Of Removal	
Parties				Show All
Filings	Filing Code	Client Ref #	Filing Description	
Submitted Date 03/11/2021 5:56 PM	Acknowledgement <sup>Status</sup> Submitted	Review Date		
Component Lead Document Download Version Original	Document Name Academic_Calendar_Spring_2019.pdf	Description	Security Confidential (G)	
Service count 0 None				
Fees				
Payment Account Waiver Order ID	Filing Attransiv Perry Mason Transaction Response	Party Responsible for Fees John Doe Transaction Amount \$0.00	Filer Type Default Transaction ID	
				Total \$0.00 Waiver Selected
				CLOSE

Figure 13.8 – Case Address Information on the Envelope Details Page

4. Click to print a copy of the envelope details.

## Viewing Mail Service Fees in the Envelope Details

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

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

To view the mail service fees in the envelope details:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.

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

Figure 13.9 – Filing History Page

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

The mail service fees are displayed in the envelope details.

Details - Case # CC-21-117 - Envelope # 256195				PRINT CLOSE
Case				
Location DFS QA 2017	Ciregory Civil		1 <sub>100</sub> Appeal	
Parties				Show All
Filings				
File Type eFile Only tubernal Date 01/21/2021 11:13 AM	Hing Code Abstract Of Judgment Salare Accepted	Client for # Network Date 01/21/2021 11:15 AM	Fileg Description Community Auto Review Accepted	
Corponent Attachments	Dournet Name Petition.pdf	Description	searchy Public (G)	
Dominal Version Original Composent Lead Document	Court Copy Doornet Name Blank Test, pdf	Description	Security Public (G)	
Dowlaad Wexion Original	Court Copy			
Service Gaset 2				Steam All
Fees				
Neprest Accessed Firm's CC Oder ID 000256195-0	Hing Atores Abby Carmichael Tensocian Nepores Approved	Thirty Dispersive for Fines Nation Watsson Terresultan Amant \$20.00	Hin Yan AutoPerlew Issuescient0 280829	
Abstract Of Judgment				^
Filing Fee				\$5.00 Subtotal \$5.00
Mail Service Fees				^
Total Mail Service Fees				\$12.00 Subtotal \$12.00
Service Fees				^
Convenience Fee Total Filing & Service Fees Total Court Service Fees				\$1.00 \$1.00 \$1.00 Subtotal \$3.00
				Grand Total \$20.00
				CLOSE

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

4. Click

to print a copy of the envelope details.

#### Viewing Certified Mail Services Information in Envelope Details

You can view the status of certified mail for a specified filing.

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

To view the certified mail services information in the envelope details:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.

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

Figure 13.11 – Filing History Page

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

The envelope details are displayed.

				_
ase				
tation TS QA 2017	Category Civil		<sup>ype</sup> Breach Of Contract	
Parties				Show
ilings				
Filing Type eFile Only Submitted Date 01/21/2021 10:32 AM	Filing Code Abstract Of Judgment Status Accepted	Client Ref # Review Date 01/21/2021 10:35 AM	Filing Description Comments Auto Review Accepted	
Component Lead Document	Document Name BlankTest.pdf	Description	Security Public (G)	
Download Version Original	Court Copy			
ervice ant: 3 Firm Admin @gmail.com	Service Method: Eserve	Lillian Henderson 1201 tenth ave Plano US, Texa	Service Method: Mail s	Hide
Status: Sent (Opened) Served Date: 01/21/2021 10:35 AM Associated Parties: None	Opened Date: 01/21/2021 11:08 AM	Status: Not Sent Tracking: 000000000000000000000000000000000000	000075025 (USPS)	
Raymond Thompson 4201 Ohio Dr Dallas US, Texas Status: Not Sent Tracking: 0000000000000000000075024 (USPS Associated Parties: None	Service Method: Mail			

Figure 13.12 – Sample Envelope Details Page

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

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

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

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

## **Resuming a Case Filing**

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

#### To resume a case filing:

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

≡ 🐝 eFile Filing Drafts				<b>∂</b> - ⊕- Ⅲ-	• ************************************
Filing Drafts Filter	FILING HISTORY FILING DRAFTS				66 Results Page 1 of 4
Location	Draft # 6666				
Any Location \$	Filing Status Filing Code	Filing Type	Filing Description	Client Ref #	
Case Number / Draft Number	Pring Status Filing Code Draft Acknowledgement	eFile Only	Acknowledgement	Chent Ref #	
Case Number	Draft # 6659 Draft # 6659 Started 10/23/19 4:56 PM by Pro Se				
Draft Number	Draft # 6658				
Date Range	Draft # 6658 Started 10/23/19 4:21 PM by unknown				
Anytime     Last Month	Draft # 5593				
O Last Week O Last Two Days	Draft # 5593 Started 10/11/19 8:14 AM by Pro Se				
O Today	Draft # 5592 Started 10/10/19 9:13 PM by Pro Se				
O Pick a Custom Range From Date	Draft # 5587				
	Draft # 5587 Started 10/10/19 1:59 PM by Pro Se				
To Date	Filing Status Filing Code Draft	Filing Type eFile Only	Filing Description	Client Ref #	
RESET FILTER	Draft # 5560				
	Draft # 5560 Started 10/8/19 1:49 PM by Pro Se				
	Draft # 5557				

Figure 13.13 – Filing Drafts Page



The filing opens on the Preload Documents page.

- 3. Navigate through the case filing to the page where you left off. Make any corrections to your entries as needed.
- 4. Continue completing the remaining required fields for the filing.
- 5. After you have completed all of the required fields, click

## **Deleting a Draft Filing**

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

1. On the Dashboard menu, click Filing Drafts.

The Filing Drafts page is displayed.

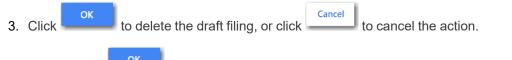
SUBMIT

≡ 🐝 eFile Filing Drafts					0-	<b>.</b>	<b></b> -	• ************************************
Filing Drafts Filter	FILING HISTORY FILING DRAFTS							66 Results Page 1 of 4
Location	Draft # 6666 Draft # 6666 Started 10/24/19 3:31 PM by Pro Se	l≱						
Any Location 🗢								
Case Number / Draft Number	Filing Status Filing Code Draft Acknowle	dgement	Filing Type eFile Only	Filing Description Acknowledgement		0	lient Ref #	
Case Number	Draft # 6659							
Draft Number	Draft # 6659 Started 10/23/19 4:56 PM by Pro Se							
Date Range	Draft # 6658 Started 10/23/19 4:21 PM by unknown							
Anytime     Last Month	Draft # 5593							
O Last Week	Draft # 5593 Started 10/11/19 8:14 AM by Pro Se							
O Last Two Days O Today	Draft # 5592							▶ 🗐 🗄
O Pick a Custom Range	Draft # 5592 Started 10/10/19 9:13 PM by Pro Se							
From Date	Draft # 5587							
	Draft # 5587 Started 10/10/19 1:59 PM by Pro Se							
To Date	Filing Status Filing Code Draft		Filing Type eFile Only	Filing Description		c	lient Ref #	
RESET FILTER	Draft # 5560							
	Draft # 5560 Started 10/8/19 1:49 PM by Pro Se							
	Draft # 5557							

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"?



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

## **Canceling a Filing**

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

To cancel a filing:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.

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

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

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



#### Topics covered in this chapter

- Creating a Bookmark for a Case
- Removing a Bookmark from a Case
- Viewing a List of Bookmarked Cases

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

≡ 🐝 eFile Bookmarks				<b>9</b> -	⊕-	<b></b> .	A
Bookmark Filter							4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description				
Any Location  Case Number	Case # CC-19-2373	Location OFS QA 2017 - Court at Law	Case Description Drina Colin v. McDonald Associates LLC				
Case Number Case Description	Case # CC-19-3477	Location OFS QA 2017	Case Description				
Case Description           RESET         FILTER	Case # CC-19-438	Location OFS QA 2018	Case Description				
	Previous 1 Next		6				4 Results Page 1 of 1

Figure 14.1 – Sample Bookmarks Page

## Creating a Bookmark for a Case

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

#### To create a bookmark for a case:

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

The page that you selected is displayed.

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

A drop-down list is displayed.

3. Select Bookmark Case.

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

## Removing a Bookmark from a Case

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

To remove an existing bookmark from a case:

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

The Bookmarks page is displayed.

= 🐝 eFile Bookmarks				<b>0</b> -	۰.	<b></b> .	A ***********************
Bookmark Filter							4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description				
Any Location +	Case #	Location	Case Description				
Case Number	CC-19-2373	OFS QA 2017 - Court at Law	Drina Colin v. McDonald Associates LLC				
Case Number	Case #	Location	Case Description				
Case Description	CC-19-3477	OFS QA 2017	OFS QA 2017				
Case Description  RESET FILTER	Case # CC-19-438	Location OFS QA 2018	Case Description				
	Previous 1 Next		6				4 Results Page 1 of 1

Figure 14.2 – Sample Bookmarks Page

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

A drop-down list is displayed.

3. Select Remove Bookmark.

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

4. Click to remove the bookmark, or click **Cancel** to cancel the action.

## Viewing a List of Bookmarked Cases

You can view a list of the cases that you have bookmarked for quick access. You can filter your view to only the specific cases that you want to see.

To view a list of cases that you have bookmarked:

1. On the Dashboard menu, click Bookmarks.

The Bookmarks page is displayed.

≡ 🐝 eFile Bookmarks				<b>8</b> -	<b>.</b>	<b></b> -	•
Bookmark Filter							4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description				
Any Location	Case #	Location	Case Description				
Case Number	CC-19-2373	OFS QA 2017 - Court at Law	Drina Colin v. McDonald Associates LLC				
Case Number	Case #	Location	Case Description				
Case Description	CC-19-3477	OFS QA 2017					
Case Description	Case #	Location	Case Description				
RESET FILTER	CC-19-438	OFS QA 2018					
	Previous 1 Next						4 Results Page 1 of

Figure 14.3 – Sample Bookmarks Page

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

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

FILTER

# 15 Bulk Filing

#### Topics covered in this chapter

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

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

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

Bulk filing begins on the *Start Filing* page. Then, complete the required fields for the first filing, followed by the next filing, and so forth. After you have prepared all of the filings for a bulk, you can view the fees for each filing, and choose the party responsible for fees, along with the payment method, for each filing. When you are done, you can submit the bulk in its entirety.

A bulk filing must contain either all initial filings or all subsequent filings.

After a bulk filing has been created, you can add additional filings to the drafts using the Bulk Add Filings

feature. Click Filing Dashboard page.

BULK ADD FILINGS

when it is enabled on the Bulk

## Dashboard

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

Dashboard	1
Q Case Search	I
Filing History	I
🖋 Filing Drafts	I
Bulk History	I
🖋 Bulk Drafts	I
Bookmarks	I
Templates	I
My Payment Accounts	I
My Service Contacts	I
My Information	I
<b>\$</b> Account Settings	I
Reports	

Figure 15.1 – Dashboard

From here, you can perform the following actions:

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

#### Bulk History

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

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

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

Figure 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.

≡- 🐝 EFILE QA 01 Bulk Draft:	5	<b>?</b> -	<b>.</b>	<b></b> -	
Bulk Drafts Filter	FILING HISTORY FILING DRAFTS BULK HISTORY BULK DRAFTS				Filters Applied 31 Result(s) Page 1 of 11
Bulk Number / Name	Bulk # 126 - Testing Test				
Bulk Number	Bulk # 126 Started 03/30/2021 9:34 AM by Pro Se				
Bulk Name	Draft # 779				
Location	Draft # 779 Started 03/30/2021 9:34 AM by Pro Se				
Any Location +	Location OFS QA 2018 - Court at Law				
Case / Draft Number					
Case Number	Bulk # 125 - Testing Test				
Draft Number					
Date Range	Draft # 778				
Anytime     Last Month     Last Week	Draft # 778 Startel 60 229/2021 2:39 PM by Pro Se Lacation OFS QA 2018 - Court at Law				
<ul> <li>Last Two Days</li> <li>Today</li> <li>Pick a Custom Range</li> </ul>	Bulk # 124 - Testing Test Bulk # 124 Started 03/29/2021 2:36 PM by Pro Se				
From Date	Draft # 777 Draft # 777 Started 03/29/2021 2:38 PM by Pro Se Location OFS QA 2018 - Court at Law				
	Previous 1 2 3 4 5 6 7 8 9 10 11 Next				31 Result(s) Page 1 of 11

Figure 15.3 – Bulk Drafts Page

## **Starting Multiple New Case Filings**

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

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

To start multiple new case filings:

1. On the Dashboard page, click

START FILING

The Start Filing page is displayed.

= 🎪 EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b> -	<b></b> -	2 martin quart ou -
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loation * Select				
Location Is Required.				
← DASHBOARD				
				O Help

Figure 15.4 – Start Filing Page

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

The New Case and Existing Case panes are displayed.

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

= 🎪 EFILE QA 01 Start Filing	<b>0</b> - ⊕- <b>Ⅲ- ⊥</b>							
Select Filing Location								
Select your filing location to see which types of filings are allowed at that location.								
Loaton # OFS MockCMS ¢								
New Case	Existing Case							
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?							
START A NEW CASE	FILE INTO EXISTING CASE							
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.							
BULK FILING IS NOT AVAILABLE AT THIS LOCATION.	BULK FILING IS NOT AVAILABLE AT THIS LOCATION.							
← DASHBOARD								
ß								
	() Help							
© 2021 Tyler Technologies, Inc.   All F	Rights Reserved   Version: 0.0.0.1676							

Figure 15.5 – Start Filing Page—Bulk Filing Not Supported

= 🎪 EFILE QA 01 Start Filing	<b>0</b> - ⊕- <b>Ⅲ- ≜</b>							
Select Filing Location Please select your location below. Location # OFS QA 2017 •								
New Case	Existing Case							
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?							
START A NEW CASE	FILE INTO EXISTING CASE							
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.							
START MULTIPLE NEW CASES	FILE INTO MULTIPLE EXISTING CASES							

Figure 15.6 – Start Filing Page—Bulk Filing Supported

3. Click

#### START MULTIPLE NEW CASES

The Bulk Filing window is displayed.

Bulk Filing		×
Bulk Name		
	CANCEL	CONTINUE

Figure 15.7 – Bulk Filing Window



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

The Bulk Filing Dashboard page is displayed.

=- ★ EFILE QA 01 Bulk Filing Dashboard				<b>0</b> - ⊕- Ⅲ-	
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you may do so.	Bulk # 157 - Sports	Cases			2 draft(s).
	Draft # 992				► <b>Ì</b> :
Quick Actions	OFS QA 2017	Case Category Civil		Case Type Negligence	
BULK ADD FILINGS	Filing Code	Filing Type	Filing Description	Client Ref #	
	Acknowledgement	eFile Only			
ADD DRAFT	Acknowledgement	eFile Only			
	Draft # 993				
	DFS QA 2017	Case Category Civil		Case Type Malpractice	
	Filing Code	Filing Type	Filing Description	Client Ref #	
	Acknowledgement	eFile and Serve			
	Acknowledgement	eFile Only			
					2 draft(s).
SAVE DRAFT AND EXIT					FEES >

Figure 15.8 – Sample Bulk Filing Dashboard

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

ADD DRAFT 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 Preload Documents page is displayed.

## Uploading Documents for a Bulk Filing

You can upload your documents for a bulk filing.

#### To upload your documents:

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

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

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

_	to	view	the	case	number	or	draft

=- 🐝 EFILE QA 01 - EFM Q	A1 Preload Doo	cuments - Bulk ;	# 328 - Sports (	ases - Draft # 7618	8 <b>()</b> -								<b>?</b> -	<b>.</b>	<b></b> -	٠	I
Preload Documents Case	Parties	Filings	Service														
document.pdf						AUTO-RE	REDACT										
						٥	Drag files here of the second seco	e or BRO	ROWSE								)
Maximum Filesize: 50.00 MB Supported File Types: MPEG (MPEG) Porta	ble Document File	(PDF) TIFF Files (T	1FF TIF) Windows I	Media File (WMV) Word 2	2007 File (DOC	OCX) Word 97/XP File (	le (DOC) WordPerfect Fi	: File (WPD) XML	ML Document ()	(XML) .							
SAVE DRAFT AND EXIT															CASE INFO	RMATION -	



2. Select each document to be uploaded.

CASE INFORMATION ->

3. Click

to continue with your filing.

The Case Information page is displayed.

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

## Entering Case Information for a Bulk Filing

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

≡• 🤹 EFILE QA 01 - EFM QA1 Case Information - Bulk # 328 - Sports Cases - Draft # 7618 0 •	ø. <del>.</del>	•
Preload Documents Case Parties Filings Service		
This is test content on case info page for firms.		
Location *	Case Category *	
OFS QA 2017 × 👻	Family	× +
https://www.hodistrictclerk.com/Common/Civil/EFiling.aspx		
Case Type *	Case Sub Type	
Other Family Law Matters × 👻	Select	٠
HPRELOAD DOCUMENTS     SAVE DRAFT AND EXIT	ADD DRAFT - PA	RTIES 🗲



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

#### ← PRELOAD 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.	PARTIES →	to save your we	ork and continue, click	ADD DRAFT (1 / 2)	•	to add another
	draft filing, or click	SAVE AND EXIT	to save your work and	d exit the filing.		

## Entering Party Details for a Bulk Filing

Each bulk filing requires a party type.

EFILE QA 01 - EFM QA1 Parties - Bulk # 329 -	Injury Cases - Draft # 7622 🚯 🕶		<b>9</b> -	⊕· Ⅲ· 🀠
Preload Documents Case Parties Filing	gs Service			
Party Type Required Party	Party Name			Actions
Defendant This is a required Part	ÿ			<b>A</b>
Personal 🛕 Address Additional Iden	tifiers			Hide Details
This is test content for Pro Se Party Personal. Purty Type Defendant Personal Information Presson C Entry				
I AM THIS PARTY First Name * First Name is Required. Party CMS ID	Midde hame	Last Name * Last Name is Required.	Select	٥
Attorney Information Lead Attorney Select	•			GO TO ADDRESS
Plaintiff This is a required Part	у			▲ 🖉
				ADD PARTY
← CASE INFORMATION SAVE DRAFT AND EXIT			ADD	) DRAFT ▲ FILINGS →
				D Help

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

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

#### Your name will be entered in the fields.

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

#### GO TO ADDRESS

6. Click to enter the address information for the first party.

Party Type	Required Party	Party Name			Actions
Defendant	This is a required Party	Kay Defendant			ø
Personal <u>Address</u>	Additional Identifiers				Hide Details
Country United States		٢			
Address Line 1			Address Line 2		
City		State Select	÷	Zip Code	
		Phone Number			
					GO TO ADDITIONAL IDENTIFIERS
Plaintiff	This is a required Party	John Plaintiff			1

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 II	DENTIFIERS	to add more information for the specified party.	
Party Type	Required Party	Party Name		Actions
Defendant	This is a required Party	Kay Defendant		1
Plaintiff	This is a required Party	John Plaintiff		/
Personal Addres	s Additional Identifiers			Hide Details
Date of Birth MM/DD/YYYY	ä			



- 9. Type the party's date of birth in the **Date of Birth** field, or click **birth** to select the date from the calendar.
- 10. Click to enter information for the other required party.
- 11. Complete all of the required fields for the second party.

苘



## Entering Filing Details for a Bulk Filing

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

=- 🤸 EFILE QA 01 - EFM QA1 FI	ings - Bulk # 328 - Sports Cases - Draft # 7619 🚯 -				<b>0</b> - ⊕-	H- 🌗
Preload Documents Case P	Parties Filings Service					
Filing Code	Client Ref #	Filing Description				Actions
Abstract Of Judgment					(	<b>a</b> 🗷 🗊
Details Optional Services 🔬	Communication					Hide Details
Test Content filing details Firm. For mo	ore information visit: www.google.com					
Filing Type 🗰		Filing Code 🕷				
eFile Only		#bstract Of Judgment -	\$5.00			× +
Filing Description			Client Reference Number			
Comments to Court						
add comment here						
						11
					CO TO OPT	IONAL SERVICES
					60 10 OF 1	IONAL SERVICES
Filing on behalf of						
ASSOCIATED PARTIES						
Documents*						
Component	Name	Actions	Description	Security		
Lead Document		SELECT DOCUMENTS	This document is required.			
		SELECT POCOMENTS	This social ment is required.			
Attachments		SELECT DOCUMENTS				
						ADD FILING (1 OF 5)
← PARTIES SAVE DRAFT AND EXIT					ADD DRAFT	<ul> <li>SERVICE →</li> </ul>
			L3			Ø Help



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

to view the case number or draft number.

GO TO OPTIONAL SERVICES

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

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The Optional Services tab is displayed.

Details Optional Services Communicat	ion	
Not Selected		Selected
Zero Fee Service	\$1	$\rightarrow$
Split Fee Service	\$10	$\rightarrow$
Certified Copies	22 × \$5	$\rightarrow$
Per Page Fee Service	77 x	→
Once Per Party	\$10	→
Priority Processing	?? x \$4	→
Placeholder Service 1		→
Placeholder Service 2 with a long description to trigg norizontal scrolling	er	→
Placeholder Service 3		$\rightarrow$
Placeholder Service 4		$\rightarrow$
r0GA Decline Error	\$280	$\rightarrow$
Broken Fee	\$10	→
Per Page Fee No Multiplier		→
		GO TO COMMUNICA

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



GO TO COMMUNICATION

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

ASSOCIATED PARTIES

9. Click to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

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

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.



14. In the Documents pane, click

Note: The filing code that you enter determines the name of the component that is displayed in the 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 Documents pane. You will be directed to upload another document for your filing.

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

#### Figure 15.17 – Documents Pane

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ 🗊			
	Drag files here or	BROWSE		
	Drag mes here of	BROWSE		
Maximum Filesize: 50.00 MB				
Supported File Types: TIFF Files (T			() Word 97/XP File (DOC)	Portable
Document File (PDF) XML Docume	ent (XML) Windows Media File	(WMV) MPEG (MPEG)		

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

Figure 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.

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

Note: If you want to delete a document that you previously uploaded, click
16. After you have added all of your lead documents, click
17. If you have attachments to add to the filing, click in the <b>Attachments</b> section. 18. If you want to add security to any of the documents, select an option from the <b>Security</b> drop-down list.
19. Click SERVICE → to save your work and continue, click ADD DRAFT (1 / 2) ↓ to add another
draft filing, or click 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.

=- 🌾 EFILE QA 01 Bulk Fees / Summary		<b>?</b> -	<b>.</b> -	<b>.</b> .	
Bulk # 87 - Testing Test					
After filling in the required fields, click on "CALCULATE FEES" at the bottom of the page. To view	v the fee details on individual drafts, click on "FEE DETAILS".				
Apply Payment Account to All Dafits Select  APPLY TO ALL*					
* Payment accounts may be restricted at some locations					
Draft # 560					
Location Care Category OFS QA 2018 - Court at Law Civil	Case Type Landlor	d / Tenant			
Payment Account *	Party Responsible for Fees				
Select +	Select	¢	SEARCH		
Payment Account is Required.					
Filer Type					
Select	\$				
Draft # 1658					
Location Case Category	Case Type				
OFS QA 2018 - Court at Law Civil	Collecti				
Payment Account *	Party Responsible for Fees				
Select +	Select	\$	SEARCH		
Payment Account is Required.					
Filer Type					
Select	۵				
← BULK DASHBOARD SAVE DRAFT AND EXIT				CALCU	LATE FEES SUMMARY →

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:

SEARCH

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-

rst Name	Last Name	Entity	Party Type		
Istinallie	Last Norre		Select	¢ Fi	LTER RESET
Select	Party Name			Party Type	
0	Mary Jones			Plaintiff	
•	John Smith			Defendant	
Previous 1 N	Vext				2 Result(s) Pag

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.

=- 🐝 EFILE QA 01 Bulk Fees / Summary			Q- (	)• Ⅲ•	±
Bulk # 87 - Testing Test					
After filling in the required fields, click on "CALCULATE I	EES" at the bottom of the page. To vie	w the fee details on individual drafts, c	lick on "FEE DETAILS".		
ply Payment Account to All Drafts Select \$	APPLY TO ALL*				
ayment accounts may be restricted at some locations					
Draft # 560					
Location OFS QA 2018 - Court at Law	Case Category Civil		Case Type Landlord / Tenant		
Payment Account *		Party Responsible for Fees			
Pro Se Waiver	۵	Test test	•	SEARCH	
Filer Type					
Default		÷			
Draft # 1658					
Location	Case Category		Case Type		2
OFS QA 2018 - Court at Law	Civil		Collection		
Payment Account *		Party Responsible for Fees			
Pro Se MC	\$	Amy Adams	+	SEARCH	
Filer Type					
Default		\$			
← BULK DASHBOARD SAVE DRAFT AND EXIT					CALCULATE FEES D Help

CALCULATE FEES

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

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

The Fee Details button is displayed.

FEE DETAILS

5. Click

The Fee Details window is displayed.

ee Details	
1 Fraud	^
Case Initiation Fee	\$10.00
	Subtotal \$10.00
Service Fees	^
Total Service Fees	\$1.00
Convenience Fee Total Court Service Fees	\$1.00 \$1.00
	Subtotal \$3.00
	Grand Total \$13.
	CLOSE

Figure 15.22 – Sample Fee Details Window

6. Review the filing fees, and then click

SUMMARY ->

# Viewing the Envelope Summary for a Bulk Filing

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

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

To view the envelope summary for a bulk filing:

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

SUMMARY 🗲

The Bulk Fees / Summary page is displayed.

SUBMIT

=- 🐝 EFILE QA 01 Bulk Fees / Summary		<b>?</b> -	<b>.</b>	<b></b> -	
Bulk # 157 - Sports Cases					
OFS QA 2017					
Submission Agreements					
Submission Agreements	the Rules for E-Filing				
I agree that this filing is in compliance with					
I agree that this filing is in compliance with					
I agree that this filing is in compliance with You must accept the Submission Agreements	Cree Category	Case Type			
I agree that this filing is in compliance with You must accept the Submission Agreements Draft # 992		Case Type Negligence			
I agree that this filing is in compliance with You must accept the Submission Agreements Draft # 992 Loaton	Cree Category				
I agree that this filing is in compliance with You must accept the Submission Agreements Draft # 992 Location OFS QA 2017	Cree Category				

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

=- 🌾 EFILE QA 01 Bulk Fees / Summary			<b>0</b> - ⊕- Ⅲ-	L
Bulk # 157 - Sports Cases			Bulk submission is complete.	BULK HISTORY DASHBOARD
OFS QA 2017				
Draft # 992				0
OFS QA 2017	Case Category Civil	Case Type Negligence		
Draft # 993				<b>S</b>
Location OFS QA 2017	Case Category Civil	Case Type Malpractice		
← FEES SAVE DRAFT AND EXIT				SUBMIT

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



# Associating Parties to a Bulk Filing

When you add a filing to a bulk draft, you can associate parties with the filings you are adding.

■-				<b>0</b> - ⊕- Ⅲ-	
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below.	Bulk # 157 - Sports	Cases			2 draft(s
If you wish to edit or add details to a specific draft, you may do so.	Draft # 992				i
Quick Actions	OFS QA 2017	Case Category Civil		Case Type Negligence	
Quick Actions BULK ADD FILINGS	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description	Client Ref #	
ADD DRAFT	Acknowledgement	eFile Only			
	Draft # 993				Image:
	OFS QA 2017	Case Category Civil		Case Type Malpractice	
	Filing Code	Filing Type	Filing Description	Client Ref #	
	Acknowledgement	eFile and Serve			
	Acknowledgement	eFile Only			2 draft
					2 draft(
SAVE DRAFT AND EXIT					FEES ->

Figure 15.25 – Sample Bulk Filing Dashboard Page

To associate parties to a bulk filing:

1. On the Bulk Filing Dashboard page in the Quick Actions pane, click

BULK ADD FILINGS

The Bulk Add Filings page is displayed.

=- 🌼 EFILE QA 01 Bulk Add Filings			<b>?</b> -	<b>.</b> -	<b></b> -	•
Drafts Add Filings Save Filings						
Select All						
Filter: Lootion Select	Case Category  Select	\$ Case Type Select				÷
						RESET FILTER
□ OFS QA 2017						
Draft # 992	Case Category Civil	Case Type Negligence				
Draft # 993	Case Category Civil	Case Type Malpractice				
← BULK DASHBOARD						ADD FILINGS ->

Figure 15.26 – Drafts Tab on the Bulk Add Filings Page

2. On the Drafts tab, if you want to filter the drafts, select the location, case category, and case type from

the drop-down lists. Then, click

3. Select the check boxes for the filings that you want to add to the bulk. If you want to add all of the filings, select the **Select All** check box.



#### The Add Filings tab is displayed.

- 🤸 EFILE QA 01 - E	FM QA1 Bulk Add Filings				Ø· ⊕· Ⅲ·
Drafts Add Filings	Save Filings				
ng Code	Client Ref #	Filin	g Description		Actions
i i					🔺 🗾 🚺
Details 🛕 Opti	ional Services Communication				Hide De
est Content filing details F	Firm. For more information visit: www.google.com				
iling Type <b>*</b>			Filing Code *		
eFile Only		÷	Select		•
			Filing Code is Required.		
ling Description				Client Reference Number	
omments to Court					
add comment here					
					GO TO OPTIONAL SERVICES
Documents*					
Belect a filing code before uplo	leading desuments				
elect a ming code before upic	oading documents.				
					ADD FILING (1
DRAFTS	$\triangleright$				SAVE FILING
					Q H

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 Documents pane, click

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

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ ■			
	Drag files here o	BROWSE		
Maximum Filesize: <b>50.00 MB</b>				
Supported File Types: TIFF Files (T	IFF TIF) WordPerfect File (WP	D) Word 2007 File (DO	CX) Word 97/XP File (DO	C) Portable
Document File (PDF) XML Docume	, , , ,	, ,	, , ,	,

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

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

BROWSE

#### SAVE FILINGS 🔿

#### 9. Click

The Save Filings tab is displayed.

=- 🤹 EFILE QA 01 Bulk Add Filings					<b>?</b> -	<b>.</b> -	<b></b> -	2 maar
Drafts Add Filings Save Filings								
Filings								
Filing Code	Filing Type eFile Only		Filing Description		Client Ref	*		
Draft # 992 Loston OFS QA 2017		Case Category Civil		Case Type Negligence				
Draft # 993 Location OFS QA 2017		Case Category Civil		Case Type Malpractice				
								SAVE



10. On the Save Filings tab, click

c	Δ1		
3	А	v	с.

The Associate Parties button is displayed for each filing.

😑 - 🤹 EFILE QA 01 Bulk Add Filings					8-	<b>.</b>	<b></b> -	•
Drafts Add Filings Save Filings								
Filings								
Filing Code Acknowledgement	Filing Type eFile Only		Filing Description		Client Ref	2		
Draft # 992 Location OFS QA 2017 ASSOCIATE PARTIES		Case Category Civil		Case Type Negligence				O
Draft # 993 Location OFS QA 2017 ASSOCIATE PARTIES		Case Category Civil		Case Type Malpractice				ø
← ADD FILINGS								DONE



	ASSOCIATE PARTIES
11. Click	

The Select Filings window is displayed.

Select Filings				×
SELECT ALL				
Select	Filing Code	Client Ref #	Filing Description	
	Addendum			
	Acknowledgement			
	Acknowledgement			
	Acknowledgement			
				CANCEL SELECT

Figure 15.31 – Select Filings Window

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

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

Associate P	arties to selec	ted Filing(s)			
First Name SELECT ALL	Last Name	Entity	Select	¢	FILTER RESET
Select	Party Name			Party Type	
	Jane Doe			Defendant	
	John Doe			Plaintiff	
Previous 1	Next				2 Result(s) Page 1 of 1
					CANCEL SAVE

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

13. If you want to filter the parties that you want to associate with the filing, type the first and last name of the specified party; and select the party type from the **Party Type** drop-down list. Then, click

Party Type
Attorney General +
Select 3rd Party Defendant 3rd Party Plaintiff 4th Party Defendant Ad Litem Administrator Affiant Agent Appellant Appellee Applicant Assault Victims Attorney Attorney Attorney Ad Litem
Attorney General
Bank Bondsman Child Victims Of Physical Abuse City Civil Defendant

FILTER

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



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

# Filing into Multiple Existing Cases

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

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

To file into multiple existing cases:

START FILING

1. On the *Dashboard* page, click

The Start Filing page is displayed.

Select Filing Location to see which types of filings are allowed at that location.	E 🍫 EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	<b></b> -	2
Sect. e Cectaton Is Required. € OSHBOARD	Select Filing Location				
Select • Location is Required. • © LSHBOARD					
◆ DASHBOARD					
	Location is Required.				
	← DASHBOARD				
	P				
() Нер					
р нар					
р нер					
О Нер					
р ныр					
					() Help

- 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.

= 🎪 FFILE QA 01 Start Filing	<b>0</b> - ⊕- <b>Ⅲ- ⊥</b>
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Looston * OFS MockCMS =	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
Firm - You can initiate buik filing.	Firm - You can bulk file into multiple cases.
BULK FILING IS NOT AVAILABLE AT THIS LOCATION.	BULK FILING IS NOT AVAILABLE AT THIS LOCATION.
← DASHBOARD	
l≽.	
	() Help
© 2021 Tyler Technologies, Inc.   All i	Rights Reserved   Version: 0.0.0.1676

Figure 15.35 – Start Filing Page—Bulk Filing Not Supported

= 🎪 EFILE QA 01 Start Filing	<b>0</b> - ⊕- <b>Ⅲ- ≜</b>
Select Filing Location Please select your location below. Location # OFS QA 2017 •	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.
START MULTIPLE NEW CASES	FILE INTO MULTIPLE EXISTING CASES

Figure 15.36 – Start Filing Page—Bulk Filing Supported

3. Click

#### FILE INTO MULTIPLE EXISTING CASES

The Bulk Filing window is displayed.

Bulk Filing	×	;
Bulk Name		
	CANCEL CONTINUE	

Figure 15.37 – 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.

=-	Ør ⊕r ⊞r <b>≛</b>
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you may do so.	Bulk # 158 - Texas
Quick Actions BULK ADD FILINGS Find Cases	
CASE SEARCH BOOKMARKS SEARCH FILING HISTORY SEARCH	
SAVE DRAFT AND EXIT	TES.≯

CONTINUE



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

# Filing into Multiple Existing Cases Using the Bookmark Search

You can file into a bulk filing that you have bookmarked and that already contains multiple existing cases.

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

To file into multiple existing cases using the Bookmark search:

1. On the Dashboard page, click

START FILING

The Start Filing page is displayed.

E 🌾 EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	<b></b> -	2 mmm.smr.gamt.com -
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loaton * Select				
Location is Required.				
← DASHBOARD				
2				
				Ø Help

Figure 15.39 – Start Filing Page

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

The New Case and Existing Case panes are displayed.

EFILE QA 01 Start Filing	<b>0</b> • ⊕• <b>Ⅲ</b> • <b>≜</b>
Select Filing Location Please select your location below.	
Locator * OFS QA 2017 +	2
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.
START MULTIPLE NEW CASES	FILE INTO MULTIPLE EXISTING CASES
←DASHBOARD	



	FILE INTO MULTIPLE EXISTING CASES	1
3. Click		

The Bulk Filing window is displayed.

Bulk Name	Bulk Filing		×
	Bulk Name		
CANCEL CONTINUE		CANCEL	CONTINUE

Figure 15.41 – Bulk Filing Window

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

The Bulk Filing Dashboard page is displayed.

=- ★ EFILE QA 01 Bulk Filing Dashboard	<b>0</b> - ⊕- <b>Ⅲ</b> - <b>≜</b>
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you may do so.	Bulk # 158 - Texas
Quick Actions BULK ADD FILINGS Find Cases CASE SEARCH BOOKMARKS SEARCH FILING HISTORY SEARCH	
SAVE DRAFT AND EXIT	FEES →

CONTINUE

Figure 15.42 – Sample Bulk Filing Dashboard Page

5. In the Quick Actions pane, click

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

BOOKMARKS SEARCH

Bookmarks Add to B	ik	
Select	Case Number Description	FILTER RESET
Case #CC-20-360 Location OFS QA 2017	) Tim Thompsonv.Laura and Associates	
Case #CC-21-006	a av.Ben Benson	
Case #CC-21-116 Location OFS QA 2017	Andrea Thompsonv.ABC Consultants	
Case #CC-21-117 Location OFS QA 2017	Naomi Watson v. Helena Carter	
Case #CV-2020-1 Jane Doe vs John		s Jane6 Doe6 vs Jane7 Doe7 vs Jane8 Doe vs Jane9 Doe vs Jane10 Doe vs
Previous 1 Next		S Result(0) Page 1 of 1
		CANCEL PROCEED

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

#### The Add to Bulk window is displayed.

Bookmarks Add to Bulk		
Case #CC-21-116 Andrea Thompsonv.ABC Consultants Location OFS QA 2017		
BACK	CANCEL	ADD TO BULK





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

To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below.	Bulk # 175 - Sports	Cases				2 draft(
If you wish to edit or add details to a specific draft, you may do so.	Case # CC-21-118	35	Case Category Civil		Case Type Malpractice	
Quick Actions	Filing Code	Filing Type		Filing Description	Client Ref #	
BULK ADD FILINGS	Acknowledgement	eFile Only				
Find Cases						
CASE SEARCH	Case # CC-21-118	34				
BOOKMARKS SEARCH	OFS QA 2017		Case Category Civil		Case Type Negligence	
FILING HISTORY SEARCH	Filing Code	Filing Type		Filing Description	Client Ref #	
	Acknowledgement	eFile Only				
						2 draft(

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

# Filing into Multiple Existing Cases Using Case Search

You can file into a bulk filing that already contains multiple existing cases from the Case Search page.

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

START FILING

To file into multiple existing cases using Case Search:

1. On the *Dashboard* page, click

The *Start Filing* page is displayed.

= 🎪 EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	<b></b>	•
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loaton * Select •				
Location is Required.				
← DASHBCARD				
2				
				Ø Help

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.

EFILE QA 01 Start Filing	<b>0</b> • ⊕• <b>Ⅲ</b> • <b>≜</b>
Select Filing Location Please select your location below.	
Locator * OFS QA 2017 +	2
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.
START MULTIPLE NEW CASES	FILE INTO MULTIPLE EXISTING CASES
←DASHBOARD	

Figure 15.47 – Start Filing Page—Bulk Filing Supported

	FILE INTO MULTIPLE EXISTING CASES	1
3. Click		

The Bulk Filing window is displayed.

Bulk Name	Bulk Filing		×
	Bulk Name		
CANCEL CONTINUE		CANCEL	CONTINUE

Figure 15.48 – Bulk Filing Window

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

The Bulk Filing Dashboard page is displayed.

=- 🐝 EFILE QA 01 Bulk Filing Dashboard	<b>0</b> - ⊕- <b>Ⅲ</b> - <b>≜</b>
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you may do so.	Bulk # 158 - Texas
Quick Actions BULK ADD FILINGS	
Find Cases	
CASE SEARCH	
BOOKMARKS SEARCH	
FILING HISTORY SEARCH	
SAVE DRAFT AND EXIT	FE3.9

CASE SEARCH

CONTINUE

Figure 15.49 – Sample Bulk Filing Dashboard Page

5. In the Quick Actions pane, click

The Case Search window is displayed.

SEARCH

or press ENTER.

PROCEED

Search for Cases Case Search Results Add to Bulk	
Location 🗚	
OFS QA 2017 \$	
Search for a Case by Case Number O Party Name	Q
If you are not sure your case number is correct, refer to the formatting instructions for the selected court.	
Case Number 🛊	
Case Number is Required.	
	CANCEL SEARCH
	CANCEL SEARCH

Figure 15.50 – Case Search Window

- 6. Select the location from the **Location** drop-down list.
- 7. Type the number for the case you want to locate, and then click

The Case Search Results window is displayed.

Search for Cases Case Search Results	Add to Bulk		
Location: OFS QA 2017 Case Number: CC-21-11	7		
Case #CC-21-117 Naomi Watson v. Helena Carter			
Location OFS QA 2017	Case Category Civil	Case Type Appeal	
REFINE SEARCH			CANCEL PROCEED

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

The Add to Bulk window is displayed.

Search for Cases Case Search Results	Add to Bulk		
Case #CC-21-117 Naomi Watson v. Helena Carter			
Location OFS QA 2017	Case Category Civil	Case Type Appeal	
SEARCH RESULTS			CANCEL ADD TO BULK



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

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

Search for Cases Case Search Results Add to Bulk	
In order to add cases to your bulk filing, one or more cases must be selected.	
SEARCH RESULTS	CANCEL ADD TO BULK

Figure 15.53 – Case Search Message—No Cases Selected

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

ADD TO BULK	1	DONE	
	. and then click	_	

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

=- 🐝 EFILE QA 01 Bulk Filing Dashboard					?-	••	<b></b> -	±
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below.	Bulk # 175 - Spor	ts Cases						2 draft(a).
If you wish to edit or add details to a specific draft, you may do so.	Case # CC-21-1	185	Case Category Civil			Case Type Malprac	tice	
Quick Actions	Filing Code	Filing Type		Filing Description			Client Re	
BULK ADD FILINGS	Acknowledgement	eFile Only						
Find Cases CASE SEARCH	Case # CC-21-1	184						
BOOKMARKS SEARCH	OFS QA 2017		Case Category Civil			Case Type Negliger	nce	
FILING HISTORY SEARCH	Filing Code Acknowledgement	Filing Type eFile Only		Filing Description			Client Re	8
		,						2 draft(s).
SAVE DRAFT AND EXIT								FEES →

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:

- START FILING
- 1. On the *Dashboard* page, click

The *Start Filing* page is displayed.

<b>?</b> -	<b>.</b>	<b></b> -	A
			() Help

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.

EFILE QA 01 Start Filing	<b>0</b> • ⊕• <b>Ⅲ</b> • <b>≜</b>
Select Filing Location Please select your location below.	
Locator * OFS QA 2017 +	2
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.
START MULTIPLE NEW CASES	FILE INTO MULTIPLE EXISTING CASES
←DASHBOARD	



	FILE INTO MULTIPLE EXISTING CASES	
3. Click		

The Bulk Filing window is displayed.

Bulk Filing	×
Bulk Name	
	CANCEL CONTINUE

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.

=- 🐝 EFILE QA 01 Bulk Filing Dashboard	<b>0</b> - ⊕- <b>Ⅲ</b> - <b>≜</b>
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you may do so.	Bulk # 158 - Texas
Quick Actions BULK ADD FILINGS	
Find Cases	
CASE SEARCH	
BOOKMARKS SEARCH	
FILING HISTORY SEARCH	
SAVE DRAFT AND EXIT	FE3.9

FILING HISTORY SEARCH

CONTINUE

Figure 15.58 – Sample Bulk Filing Dashboard Page

5. In the Quick Actions pane, click

The *Filing History* window is displayed.

Filing History Add to Bulk			
Select	Case Number		
ate Range			
Anytime	From Date	To Date	
,			
			FILTER RESET
Choose at most 2.			
Case #CC-20-2697			
Location	Case Category	Case Type	
OFS QA 2017	Civil	City Ordinance Cases	
Case #CC-20-1971			
Location	Case Category	Case Type	
OFS QA 2017	Civil	City Ordinance Cases	
Case #CC-20-2041			
Pro Sev.Frederick & Sons			
Location	Case Category	Саве Туре	
OFS QA 2017	Civil	Breach Of Contract	
Previous 1 Next			3 Result(s) Page 1 o
			CANCEL PROCEED

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.

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



Note: If your bulk filing is not displayed in the *Filing History* window, you can search for the bulk filing that you want. First, select the location from the Location drop-down list. Then, type the case number in the Case Number field, and then select the date range for the filings you want to



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

To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below.	Bulk # 175 - Spoi	rts Cases				2 drafti
If you wish to edit or add details to a specific draft, you may do so.	Case # CC-21-1	185	Case Category Civil		Case Type Malpractice	
Quick Actions	Filing Code	Filing Type		Filing Description	Client Ref #	
BULK ADD FILINGS	Acknowledgement	eFile Only				
Find Cases						
CASE SEARCH	Case # CC-21-1	184				
BOOKMARKS SEARCH	OFS QA 2017		Case Category Civil		Case Type Negligence	
FILING HISTORY SEARCH	Filing Code	Filing Type		Filing Description	Client Ref #	
	Acknowledgement	eFile Only				
						2 draft

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

# Copying a Bulk Filing

You can copy a bulk draft filing if one or more envelopes in the bulk filing failed to submit.

To copy a bulk filing:

- 1. Navigate to the Bulk History page or the Bulk Drafts page.
- 2. Locate the bulk filing that you want to copy.

Bulk # 136 - V Bulk # 136 Started 04/14/2021 5	Nednesday Test				ľ
Draft # 817 Draft # 817 Started 04/14/2 Location OFS QA 2017	, 021 5:21 PM on behalf of Jack Stone by Lau	iren Groswald			Ē
Filing Status Draft Draft	Filing Code Acknowledgement Abstract Of Judgment	Filing Type Efile Efile	Filing Description	Client Ref #	
Draft # 818 Draft # 818 Started 04/14/2 Location OFS QA 2017	021 5:24 PM on behalf of Jack Stone by Lau	iren Groswald			B
Filing Status Draft	Filing Code Acknowledgement	Filing Type Efile	Filing Description	Client Ref #	





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

=- 🐝 EFILE QA 01 Bulk Filing Dashboard				<b>?</b>	
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below.	Bulk # 157 - Sports	Cases			2 draft(s).
If you wish to edit or add details to a specific draft, you may do so.	Draft # 992	Case Category		Case Type	
Ouick Actions	OFS QA 2017	Civil		Negligence	
BULK ADD FILINGS	Filing Code Acknowledgement Acknowledgement	Filing Type eFile Only eFile Only	Filing Description	Client Ref #	
	Draft # 993				
	Location OFS QA 2017	Case Category Civil		Case Type Malpractice	
	Filing Code Acknowledgement	Filing Type eFile and Serve	Filing Description	Client Ref #	
	Acknowledgement	eFile Only			
					2 draft(s).
SAVE DRAFT AND EXIT					FEES →

Figure 15.63 – Sample Bulk Filing Dashboard

4. Continue with your filing.

# **16** Vacation Letter (or Leave of Absence)

#### Topics covered in this chapter

- Dashboard
- Filing a Vacation Letter (or Leave of Absence)
- Entering Payment Information for a Vacation Letter (or Leave of Absence) Filing
- Viewing the Envelope Summary for a Vacation Letter (or Leave of Absence) Filing

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

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

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.

ET 🤹 EFILE QA 01 - EFM QA4 Bulk	History				@- ⊕- Ⅲ-	±
Filing History Filter	FILING HISTORY FILING D	DRAFTS BULK HISTORY BULK DRAFTS				4 Result(s) Page 1 of 2
Bulk Number / Name	Bulk # 242					
Bulk Number	Bulk # 242 Started 06/24/2021 8:55	5 AM by Pro Se				
Bulk Name	Case # CC-2	0.2607				
Status		.U-∠Oソノ 06/24/2021 9.04 AM by Pro Se				B
All Statuses     Accepted	Location OFS QA 2017					
Cancelled Receipted Served Returned	Filing Status Submitted	Filing Code Notice - Auto Accept	Filing Type Efile	Filing Description	Client Ref #	8
O Submitted O Submitting	Case # CC-2 Pro Sey Frederic					6
Location		K & SOTIS 06/24/2021 9:04 AM by Pro Se				
Any Location +	OFS QA 2017					
Case / Envelope Number	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Case Number	Submitted	Notice - Auto Accept	Efile	Fiing Description	Cheft Ref #	×
Envelope Number						
Date Range	Bulk # 240					
Anytime     Last Month	Bulk # 240 Started 06/24/2021 8:36	5 AM by Pro Se				
Last Workt     Last Week     Last Two Days     Today     Pick a Custom Range     From Date	Case # CC-2 Envelope # 290625 Submitted Location OFS QA 2017	1 <b>0-2697</b> 06/24/2021 8.42 AM by Pro Se				6
RESET FILTER	Filing Status Accepted	Filing Code Notice - Auto Accept	Filing Type Efile	Filing Description	Client Ref #	⑦ Help

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.

EFILE QA 01 - EFM QA4 Bulk (	Drafts			<b>8</b> -	⊕- <b>≣</b>	• <b>1</b>
Bulk Drafts Filter	FILING HISTORY FILING DRAFTS BULK HISTORY	BULK DRAFTS				34 Result(s) Page 1 of 12
Bulk Number / Name	Bulk # 244					
Bulk Number	Bulk # 244 Started 06/24/2021 9:05 AM by Pro Se					
Bulk Name	Case # CC-20-2697					
Location	Draft # 3201 Started 06/24/2021 9:05 AM by Pro Se					
Any Location +	OFS QA 2017					
Case / Draft Number	Filing Code	Filing Type	Filing Description		Client Ref #	
Case Number	Application	Efile				
Draft Number	Case # CC-20-2041					
Date Range	Pro Sev.Frederick & Sons					
Anytime     Last Month     Last Week     Last Two Days	Draft # 3202 Started 06/24/2021 9:05 AM by Pro Se Location OFS QA 2017					
<ul> <li>Last two Days</li> <li>Today</li> <li>Pick a Custom Range</li> </ul>	Filing Code Application	Filing Type Efile	Filing Description		Client Ref #	
From Date						
To Date	Case # CC-20-1971 Draft # 3203 Started 06/24/2021 9:06 AM by Pro Se Location					
RESET	0FS QA 2017					
	Filing Code Application	Filing Type Efile	Filing Description		Client Ref #	
	Bulk # 173 - Testing Test Bulk # 173 Started 05/11/2021 9:33 AM by Pro Se					<ul> <li>П</li> <li>Э</li> <li>Э</li> <li>Неір</li> </ul>

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.

E- 🤹 EFILE QA 01 - EFM QA4 Dashboard		<b>⊖</b> - ⊕- <b>Ⅲ</b> - <b>≜</b>
Start Filing	Filing History	Drafts 🥒
Are you filing an original petition with courts? OR Are you Filing on a case that already exists in the courts? Not sure? Click the START FILING button to see the options.	Case # CC-21-1185 Envelope # 15544 Submitted at 05/11/2021 2:38 PM Filings: Submitted (1)	Draft # 1336 Draft # 1336 Started at 05/18/2021 4:05 PM Draft # 874
	Envelope # 14512 Envelope # 14512 Submitted at 05/10/2021 3:31 PM Filings: Submitted (1)	Draft # 074 Started at 04/26/2021 12:58 PM Draft # 873 Started at 04/26/2021 12:56 PM Draft # 873 Started at 04/26/2021 12:56 PM
START FILING	Envelope # 14511 Envelope # 14511 Submitted at 05/10/2021 3:31 PM Filings: Submitted (1)	
FILE VACATION LETTER	View Filing History	View My Drafts
Case Search Q	Bookmarkan	Templates
	-	
Search Cases	View My Bookmarks	View My Templates
		Ø Help

Figure 16.4 – Dashboard Page

To file a vacation letter:

1. From the Dashboard menu, click Vacation Letter or click

FILE VACATION LETTER

on the *Dashboard* page.

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

=- 🌼 EFILE QA 01 - EFM QA4 File Vacation Letter	Ø- ⊕- <u>Ⅲ</u> - <b>⊥</b>
Options Cases Filing Save	
Vacation Letter Type *	Vacation Letter Filing Name
Select +	
Vacation Letter Type is Required.	
	NEXT

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.

Vacation Letter Type \star	
Select	÷
Select LEAVE OF ABSENCE MORE THAN 30 DAYS	
LEAVE OF ABSENCE LESS THAN 30 DAYS	

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.

🚍 - 🤹 EFILE QA 01 - EFM QA4 File Vacation Letter		<b>?</b> -	<b>.</b>	•	
Options Cases Filing Save					
Vacation Letter Type * LEAVE OF ABSENCE LESS THAN 30 DAYS	Vacation Letter Filing Name Jones Law Firm				
This will only apply to cases at the following locations: OFS MockCMS OFS QA 2017 OFS QA 2018 OFS QA 2014					

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



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

=- 🌼 EFILE QA 01 - EFM QA4 File Vacation Letter		?-	•-	-	L
Options Cases Filing Save					
Created By	Location	Case Number			
My Filings •	Select +				
Date Range					
Anytime +					
SELECT ALL					FILTER RESET
✓ Case # CC-21-1185					
*****					
Location	Case Category Civil	Case Type			
OFS QA 2017	Civil	Malpractice			
✓ Case # CC-21-1184					
******					
Location	Case Category	Case Type			
0FS QA 2017	Civil	Negligence			
Previous 1 Next					2 Result(s) Page 1 of 1
PREVIOUS					NEXT

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

	SELECT ALL	
to select all of your cases, click		

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

and then click

FILTER

NEXT

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

🚍 - 🤸 EFILE QA 01 - EFM QA4 File Vacation Letter	<b>?</b> -	<b>.</b>	 L
Options Cases Filing Save			
Filing Type *			
eFile Only +			
Filing Description Client Reference Number			
Comments to Court 😯			
add comment here			
			,
Document *			
Choose File No file chosen			
Document is required.			
Maximum Filesize: 50.00 MB Supported File Types: MPEG (MPEG) Portable Document File (PDF) TIFF Files (TIFF TIF) Windows Media File (WMV) Word 2007 File (DOCX) Word 97/XP File (DOC) WordPerfect File (WPD).			
PREVIOUS			NEXT

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



9. Click

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

=- 🐝 EFILE QA 01 - EFM QA4 File Vacation Letter		<b>@</b> -	•-	•	·
Options Cases Filing Save					
Filing Filing Type eFile Only Document 10A28641-2-2012-02-24-NoticeOfLeaveOfAbsence-SeanLHynes.pdf					
Case # CC-21-1185 *********	Case Category	Case Type			
OFS QA 2017	Civil	Malpractice			
Case # CC-21-1184					
Location OFS QA 2017	Case Category Civil	Case Type Negligence			
PREVIOUS					SAVE

Figure 16.10 – Save Tab on the File Vacation Letter Page

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

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.

SAVE

=- 🐝 EFILE QA 01 - EFM QA4 Bulk Filin	ng Dashboard			<b>?</b> -	<b>-</b>	-	<b>.</b>
Bulk # 250 - Jones Law F	Firm						
This is test content for vacation letter.							
							2 draft(s).
Case # CC-21-1185							
OFS QA 2017		Case Category Civil		Case Type Malpractice			
		0.01		Mapraettee			
Filing Code	Filing Type		Filing Description		Client Ref #		
Notice - Auto Accept	eFile Only						
Case # CC-21-1184							
Location		Case Category		Case Type			
0FS QA 2017		Civil		Negligence			
Filing Code	Filing Type		Filing Description		Client Ref #		
Notice - Auto Accept	eFile Only						
							2 draft(s).
SAVE DRAFT AND EXIT							FEES ->

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

FEES 🗲		SAVE DRAFT AND EXIT	
11. Click	to continue with your filing, or click		to save your filing and
continue it at ano	ther 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.

EFILE QA 01 - EFM QA4 Bulk Fees / Summary				<b>8</b> -	<b>.</b>	<b></b> -	A
Bulk # 262 - Jane's Law Firm							
After filling in the required fields, click on "CALCULATE FEES" a	at the bottom of the page. To view the fe	e details on individual o	drafts, click on "FEE DETAILS".				
pply Payment Account to All Drafts Select	APPLY TO ALL*		Apply Filing Attorney to All Drafts Select	٠	APPLY TO	) ALL	
Payment accounts may be restricted at some locations							
Case # CC-21-1185							
OFS QA 2017	Case Category Civil			Case Type Malpractice			
Payment Account *		Party Responsible for Fees			0540044		
Lauren's Waiver	•	Select		\$	SEARCH		
Filing Attorney ① * Select	\$	Filer Type Select					\$
Filing Attorney is Required.							
Case # CC-21-1184	Case Category			Case Type			
OFS QA 2017	Civil			Negligence			
Payment Account *		Party Responsible for Fees			SEARCH		
Lauren's Waiver	+	Select		÷	SEARCH		
Filing Attorney <b>1</b> *	•	Filer Type Select					•
Filing Attorney is Required.							
← BULK DASHBOARD SAVE DRAFT AND EXIT						0	ALCULATE FEES SUMMARY ->
						U	SUMMART 9
							D Help

#### 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

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.

EFILE QA 01 - EFM QA4 Bulk Fees / Summary						<b>?</b> ∙	<b>.</b>	•	±
Bulk # 262 - Jane's Law Firm									
After filling in the required fields, click on "CALCULATE FEEs"	at the bottom of the page. To view the f	fee det	tails on individual d	rafts, click on "FEE DETAILS".					
pply Payment Account to All Drafts				Apply Filing Attorney to All Drafts					
Lauren's Waiver \$	APPLY TO ALL*			Perry Mason		\$	APPLY TO	ALL	
Payment accounts may be restricted at some locations									
Case # CC-21-1185									
Location OFS QA 2017	Case Category Civil				Case Type Malpractice				
Payment Account *		Par	rty Responsible for Fees						
Lauren's Waiver	\$		Select			٠	SEARCH		
Filing Attorney 🚺 🕊		File	er Type						
Perry Mason	\$		Select						+
Case # CC-21-1184	Case Category Civil				Case Type Negligence				
Payment Account *		Par	rty Responsible for Fees						
Lauren's Waiver	\$		Select			•	SEARCH		
Filing Attorney 🚺 🕊		File	er Type						
Perry Mason	\$		Select						•
← BULK DASHBOARD SAVE DRAFT AND EXIT									CALCULATE FEES SUMMARY →
									() Help

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

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

CALCULATE FEES

The fee totals and the Fee Details button are displayed.

EFILE QA 01 - EFM QA4 Bulk Fees / Summary					9-	<b>.</b>	<b></b> .	
ulk # 262 - Jane's Law Firm								
After filling in the required fields, click on "CALCULATE FEE	S" at the bottom of the	page. To view the fe	e details on individual	drafts, click on "FEE DETAILS".				
Ny Payment Account to All Drafts	APPLY TO ALL*			Apply Filing Attorney to All Drafts Perry Mason	•	APPLY T	0 ALL	
ayment accounts may be restricted at some locations								
Case # CC-21-1185								
Location OFS QA 2017		Case Category Civil			Case Type Malpractice			
Payment Account *			Party Responsible for Fees					
Lauren's Waiver		•	Select		\$	SEARCH		
Filing Attorney <b>1</b> * Perry Mason		•	Filer Type Select					÷ •
Total \$0.00	FEE DETAILS							
Case # CC-21-1184								
Location OFS QA 2017		Case Category Civil			Case Type Negligence			
Payment Account 🔻			Party Responsible for Fees					
Lauren's Waiver		٠	Select		\$	SEARCH		
Filing Attorney 🛛 *		:	Filer Type Select					•
Perty mason		•	Select					Ţ
Total \$0.00	FEE DETAILS							
← BULK DASHBOARD SAVE DRAFT AND EXIT								CALCULATE FEES SUMMARY
				6			_	

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

#### FEE DETAILS

6. Click

The Fee Details window is displayed.

SUMMARY 🗲

7. Review the filing fees, and then click

## 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

EFILE QA 01 - EFM QA4 Bulk Fees / Sun	mmary	<b>∂</b> -	<b>⊕</b> - Ⅲ-	• THEFT CONSIGNAL CON-
ulk # 262 - Jane's Law Firn	n			
OFS QA 2017				
Submission Agreements	e Rules for E-Filing			
Case # CC-21-1185				
Location	Case Category Civil	Case Type Malpractice		
Case # CC-21-1185 Location OFS QA 2017 Case # CC-21-1184				

Figure 16.15 – Sample Bulk Fees / Summary Page





#### Topics covered in this chapter

#### Creating a Report

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

## **Creating a Report**

#### To run a report:

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

The Reports page is displayed.

EFILE QA 01 Reports			<b>?</b> -	<b>.</b>	•	-
Reports						
Useful when reconciling financial transaction	ons against envelopes submitted during a selectable time frame up to 60 days. *	Provides envelope and filing level information specific to fees. * Delive	red in an Excel spre	adsheet to a	llow for filteri	ing and searching.
Location						
Status		Date From 🧚	ë	Date To 🗚		<b>m</b>
Accepted	Reviewed					
Cancelled     Receipted	<ul> <li>Served</li> <li>Submission Failed</li> </ul>	Date From is Required.		Date To	is Require	d.
Returned	V Submitted					
						CANCEL DOWNLOAD REPORT
N						
ß						

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.

DONE

elect Locations		
ïlter		
Select All		^
System		
✓ ☐ File and Serve		
<ul> <li>OFS Criminal (QAJUDTX)</li> </ul>		
OFS Criminal (QAJUDTX)Court At Law		- 1
<ul> <li>OFS QA 2017</li> </ul>		
OFS QA 2017 - Court at Law		- 1
OFS QA 2017 - Court at Law 1		- 1
OFS QA 2017 - Court at Law 2		- 1
<ul> <li>OFS QA 2018</li> </ul>		- 1
OFS QA 2018 - Court at Law		- 1
OFS QA 2018 - Court at Law 1		
OFS QA 2018 - Court at Law 2		
<ul> <li>OFS QA 2014</li> </ul>	2	
OFS QA 2014 - Court at Law		
OFS QA 2014 - Court at Law 1		
OFS QA 2014 - Court at Law 2		
OFS Criminal (QAJUDCA)		-

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.

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

Figure 17.3 – Error Message for Report Date Range

DOWNLOAD REPORT

6. Click

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

# **18** Support and Feedback

#### Topics covered in this chapter

- Requesting Support
- Zendesk Support
- Providing Feedback
- Tyler Technologies Technical Support Contact Information

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

## **Requesting Support**

You can request support from Tyler regarding the application.

To request support regarding the application:



in the eFile header.

The Support / Feedback window is displayed.

Support	Feedback
I have a problem with the Application.	I have a Suggestion.
I have a technical problem with eFiling.	I have a Feature Request.
GET SUPPORT	GIVE FEEDBACK



GET SUPPORT

The Support window is displayed.

Note: Your screen may vary from the example provided.

Support	×
Self Service Support Contact Technical Support	
ß	BACK TO SUPPORT / FEEDBACK CLOSE

#### Figure 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.

		BACK TO SUPPORT / FEEDBACK		CLOSE	1
4.	Either click		, or click		

## Zendesk Support

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

= 🐝 eFile Dashboard		<b>⊙</b> • ⊕• Ⅲ• <b>≜</b>
Start Filing	Filing History	Drafts
Click on START FILING to select your filing options. You could initiate a case or file into an existing case. Click here.	Case # CC-20-182           Envelope # 3277 Submitted at 10/21/2020 10:50 AM           Filings: Submitted (1)           Case # CC-20-182           Envelope # 3276 Submitted at 10/19/2020 5:39 PM           Filings: Submitted (1)           Case # CC-20-182           Envelope # 3275 Submitted at 10/19/2020 5:28 PM           Filings: Submitted (1)	Draft # 15081 Draft # 15081 Started at 11/23/2020 3:44 PM Draft # 15075 Draft # 15075 Started at 11/16/2020 1:32 PM Draft # 15055 Draft # 15055 Started at 11/09/2020 1:17 PM
START FILING	View Filing History	View My Drafts
Case Search Q	Bookmarks	Templates
Case # 'CC-20-182' OFS QA 2018	CC-19-2373 - Drina Colin v. McDonald Associates LLC OFS QA 2017 - Court at Law	Small Claims template
Case # 'CC-20-201' OFS QA 2017	CC-15-1813 - ******** File and Serve	simple civil
Search Cases	View My Bookmarks	View My Templates
		D Help

Figure 18.3 – Help Icon on the Dashboard Page

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

	Odyssey File and Serve _ Cloud _
•••	Odyssey File and Serve Cloud · Bot Hi! Welcome to Odyssey File and Serve Cloud. Ask me a question and I'll find the answer for you.
Туре	Get in touch

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.

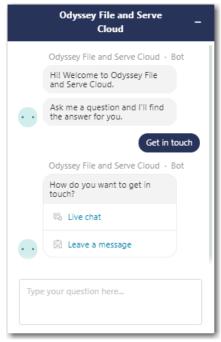


Figure 18.5 – Chat Modal with Communication Options

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.

Support / Feedback	×
Support	Feedback
I have a problem with the Application.	I have a Suggestion.
I have a technical problem with eFiling.	I have a Feature Request.
GET SUPPORT	GIVE FEEDBACK
	CLOSE

Figure 18.6 – Support / Feedback Window

GIVE FEEDBACK

The *Feedback* window is displayed.

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

Figure 18.7 – Feedback Window

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

Feedback Type \star	
Feedback	÷
Select	
Feedback	
Suggestion Other	
Other	

Figure 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.



## 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.	