

# Firm Administrator User Guide Odyssey<sup>®</sup> File & Serve<sup>™</sup> 2021.8

November 2021

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# Publishing History

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

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

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

Document Publication Number	Revision	Date	Changes Made
			<ul> <li>Added information regarding the new Start Filing page</li> </ul>
			<ul> <li>Added information about the new Mail Service fees</li> </ul>
			<ul> <li>Added information about tracking certified mail for a filing on the <i>Envelope</i> <i>Details</i> page</li> </ul>
			Updated the Service Contacts section to include information about the service method drop-down list on the <i>Service</i> page
			<ul> <li>Updated the "Creating a Service Only Filing" topic</li> </ul>
			<ul> <li>Updated the "Filing into an Existing Case from the Dashboard Page" topic</li> </ul>
ESO-FS-220-4496 v.10	Tenth	March 2021	The following changes were made:
			<ul> <li>Reordered chapters to better represent normal usage during a case filing</li> </ul>
			<ul> <li>Updated the Upload Documents page to include all document types that are now supported for uploading</li> </ul>
			<ul> <li>Added the case level address feature</li> </ul>
			<ul> <li>Revised the "Viewing the Envelope Details" topic</li> </ul>
			<ul> <li>Created separate topic for viewing mail service fees in the envelope details</li> </ul>
ESO-FS-220-4496 v.11	Eleventh	May 2021	The following changes were made:
			<ul> <li>Added bulk filing to this release</li> </ul>
			<ul> <li>Added the ability to add a service contact that is not associated with any party on the case to an initial filing</li> </ul>
ESO-FS-220-4496 v.12	Twelfth	July 2021	The following changes were made:

Document Publication Number	Revision	Date	Changes Made
			<ul> <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 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> </ul>
ESO-FS-220-4496 v.13	Thirteenth	October 2021	<ul> <li>The following changes were made:</li> <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> <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 <b>Add Documents</b> button in the Documents pane has been changed to the <b>Documents</b> button.</li> <li>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.</li> </ul>

Document Publication Number	Revision	Date	Changes Made
ESO-FS-220-4496 v.14	Fourteenth	November 2021	The following changes were made:
			<ul> <li>Added the ability to view service contact history</li> </ul>
			<ul> <li>Added the ability to view the case judicial officer from specified pages in the application</li> </ul>
			<ul> <li>Added the ability to search and filter specified drop- down menus</li> </ul>
			<ul> <li>Updated the Support and Feedback sections</li> </ul>
			<ul> <li>Added the ability to view the Return Date and Out of State indicator in the envelope details</li> </ul>
ESO-FS-220-4496 v.15	Fifteenth	November 2021	The following changes were made:
			<ul> <li>Updated the "Redaction" chapter to include the addition of the transactional redaction feature</li> </ul>
			<ul> <li>Updated the <i>Filings</i> page sections to include the required optional services feature</li> </ul>
			<ul> <li>Added descriptions of the additional fields on the <i>Parties</i> page in the Additional Identifiers tab</li> </ul>
			<ul> <li>Added a section for the new keyboard shortcuts, available through the Help drop-down menu</li> </ul>
			<ul> <li>Updated the "Support and Feedback" chapter to include the revised Help drop-down menu</li> </ul>
			<ul> <li>Added the "Manage Account" chapter</li> </ul>
			<ul> <li>Revised "Changing the User Password" and moved the section to the "Manage Account" chapter</li> </ul>
			<ul> <li>Added a description of the new <i>Profile</i> page</li> </ul>

Document Publication Number	Revision	Date	Changes Made
			<ul> <li>Added a description of the new <i>Email Notifications</i> page</li> </ul>
			<ul> <li>Revised the "Signing Out" section</li> </ul>
			<ul> <li>Removed Account Settings from the Dashboard menu. Also removed the Account Settings description from the "Orientation" section.</li> </ul>
			<ul> <li>Added a chapter to describe how to access re: Search from Odyssey File &amp; Serve</li> </ul>

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## About This Guide

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

User guides may include the following elements:

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

#### Audience

This document is intended for the following personas:

- Clients
- Tyler Client Services

#### **Documentation Conventions**

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

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

#### **Documentation Notes**

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

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

# 1 System Overview

#### Topics covered in this chapter

- ◆ Release 2021.8 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 2021.8 Enhancements

Feature/Update **Description/Location in Document** Entering a Filing with Redacted Documents, page The transactional redaction feature was added. 146 The optional services feature was changed to The filing details were updated throughout the required optional services for some configurations. document with new screen shots, along with the corresponding steps for applying the required optional service, when an optional service is required by the court. Additional fields were added to the Additional The following topics were updated: Identifiers tab on the Parties page. Entering Party Details, page 62 Entering Service of Process Information on the Parties Page, page 130 Entering Party Details for a Bulk Filing, page 229 Keyboard shortcuts were added, which are Keyboard Shortcuts, page 3 available through the **Help** drop-down menu. The "Support and Feedback" chapter was updated The following topics were updated: to include the revised Help drop-down menu. Requesting Support, page 276 Providing Feedback, page 279 The "Manage Account" chapter was added. Manage Account, page 23 The "Changing the User Password" section was Changing the User Password, page 23 revised and moved to the "Manage Account" chapter.

The following enhancements were made to the Odyssey<sup>®</sup> File & Serve<sup>™</sup> system for Release 2021.8.

The new Profile page was added.

The new Email Notifications page was added.

The "Signing Out" section was revised.

Updating the User Profile, page 24

Signing Out, page 21

Selecting Email Notifications, page 25

Feature/Update	Description/Location in Document	
The <b>Account Settings</b> option was removed from each Dashboard menu in the document.	The following topics were updated:	
each Dashboard menu in the document.	Orientation, page 5	
	Dashboard, page 27	
	Dashboard, page 222	
	Dashboard, page 262	
The ability to access re:Search from Odyssey File & Serve was added.	Access re:Search <sup>®</sup> , page 175	

# Before You Begin

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

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

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

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

## System Requirements

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

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

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

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

- Microsoft Windows Media Video (WMV)
- Microsoft Word (DOCX, DOC)
- MPEG (MPG)
- WordPerfect<sup>®</sup> (WPD)
- XML

## **Page Navigation**

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

#### **Using the Mouse**

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

#### Using the Keyboard

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

### **Keyboard Shortcuts**

You can access the keyboard shortcuts from the Help drop-down menu.



in the eFile header.

The Help drop-down menu is displayed.



Figure 1.1 – Help Drop-Down Menu

#### Click Keyboard Shortcuts.

The Keyboard Shortcuts window is displayed.

t + ו + b Go - Bookmarks	alt + 🕯 + a Go - Firm Attorneys	alt + 🕆 + f Go - Start Filing	
lt + 🕯 + y Go - Bulk Drafts	alt + 🕯 + 1 Go - Firm Details	alt + 🕯 + t Go - Templates	
lt + û + k Go - Bulk History	alt + û + p Go - Firm Payment Accounts	alt + 🕯 + v Go - Vacation Letter	
lt + û + c Go-Case Search	alt + t + s Go - Firm Service Contacts	Show Keyboard Shortcut List	
lt + û + d Go - Dashboard	alt + 🛊 + u Go - Firm Users	alt + û + m Toggle Menu	
lt + 🕯 + r Go - Filing Drafts	alt + û + n Go - Profile		
lt + û + h Go - Filing History	alt + 🕯 + o Go - Reports		

Figure 1.2 – Keyboard Shortcuts Window

Select the option that you want. You can turn hot keys on or off, or you could set a reminder to enable the hot keys at a later time.

## **Drop-Down Menus**

The application allows you to search and filter various drop-down menus to quickly find the selection that you want.

The search function allows you to type the name of the item that you want to locate in the search field. The search function can be used in the following drop-down menus:

- Location field in the following places in the application:
  - Start Filing page
  - Case Search page
  - Case Information page
- Case Category field
- · Case Type field
- · Party Type field
- Filing Code field
- Payment Account field on the Fees page
- Filing Attorney field on the Fees page

Note: All users may not see the Filing Attorney 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		Ø· ⊕· <b>Ⅲ</b> · <b>≟</b> maaraangaaa ay
Start Filing	Filing History	Drafts
Click on START FILING to select your filing options. You could initiate a case or file into an existing case.	Envelope # 165149 Envelope # 165149 Submitted at 01/24/2020 9:22 AM Filings: Submitted (1)	Draft # 9063 Draft # 9063 Started at 01/22/2020 3:55 PM
	Envelope # 745447	Draft # 9062 Draft # 9062 Started at 01/22/2020 3:54 PM
	Envelope # 745447 Submitted at 12/16/2019 4:54 PM Filings: Submitted (1)	Draft # 9060 Draft # 9060 Started at 01/22/2020 1:42 PM
	Case # cc-15-1813 Envelope # 157230 Submitted at 11/05/2019 9:06 PM Filings: Accepted (1)	
START FILING	View Filing History	View My Drafts
Case Search Q	Bookmarks	Templates
	<b>CC-15-1813 - ********</b> OFS QA 2017	
	CC-19-3942 - b b v. a a OFS QA 2017 - Court at Law	
	CC-15-230 File and Serve	
Search Cases	View My Bookmarks	View My Templates

Figure 1.3 – Dashboard Page

#### **Case Search**

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

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

Figure 1.4 – 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.

cation <b>*</b>		
Select	÷	
ocation is Required.		
Case number format is default.		
se Number 🗚		
ase Number is Required.		
	CANCEL SEARCH	

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

E 🌾 oFile Case Search	<b>?</b> -	<b>.</b>	•	
← DASHBOARD				REFINE SEARCH
Figure 1.6 – Case Search Page with No Search Results Displayed				

#### **Filing History**

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

= 🔆 eFile Filing History					0- <del>-</del> .	
Filing History Filter	FILING HISTORY FILING DR					10 Result(s) Page 1 of 1
Created By	Envelope # 16					
My Filings     My Firm	Envelope # 165241 Submitted 01/28	/2020 3:49 PM on behalf of Sam Smith by Firm Admin	Filing Type	Filing Description	Client Ref #	
Status	Submitted	Appointment	eFile Only			8
All Statuses     Accepted     Cancelled	Envelope # 165228 Submitted 01/28	5228 /2020 10:39 AM on behalf of Sam Smith by Firm Admin				
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8
O Submitting	Case # 1234	/2020 8:47 AM on behalf of Sam Smith by Firm Admin				🖆 🖹 🗄
Location		2020 C-F7 Am on Denan of Sum Small by Film Admin				
Any Location +	Filing Status Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #	
Case Number / Envelope Number	Envelope # 16	5223				
Case Number		/2020 8:29 AM on behalf of Sam Smith by Firm Admin				
Envelope Number	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Date Range	SubmissionFailed	Appendix	eFile Only			
Anytime     Last Month     Last Week	Case # CC-19-	3477 /2020 8:23 AM on behalf of Sam Smith by Firm Admin				
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8
From Date	Envelope # 16	5221				B 💷 🗄
To Date		/2020 8:17 AM on behalf of Sam Smith by Firm Admin				
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #	

Figure 1.7 – Filing History Page

#### Filing Drafts

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

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

Figure 1.8 – 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-	●- ■-	▲ ************************************
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		L3			4 Results Page 1 of 1

Figure 1.9 – Sample Bookmarks Page

#### Templates

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

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

Figure 1.10 – Templates Page

#### **Firm Users**

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

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

Figure 1.11 – Sample Firm Users Page

#### **Firm Attorneys**

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

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



#### **Firm Payment Accounts**

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

■ Serile Payment Accounts			0 <sup>.</sup>	• ••• •	·
USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
xount Name	Account Type Select	Account Status     Select	• FILTER RESET		
Payment Account Name	Payment Account Type	Status	Last 4 Digits		Actions
Firm's CC	Credit Card	Active	5454		1
Mary Ann's Waiver	Waiver	Active			1
New Mastercard	Credit Card	Active	5454		1
Previous 1 Next					3 Results Page 1



#### **Firm Details**

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

≡ 🐝 eFile Firm Details			<b>8</b> -	<b>.</b>	•	L
USERS	ATTORNEYS	PAYMENT ACCOUNTS				FIRM DETAILS
Film Name ABC Test Firm Country United States Address Line 1 * 5101 Tennyson Pixwy		Addres Line 2				
Cay * Plano Prove Namber * 9727133770	Suto * Texas	720 Code <b>★</b> ● 75024				SAVE

Figure 1.14 – Sample Firm Details Page

#### **Firm Service Contacts**

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

E V . eFile Service Contacts			<b>9</b> - \$	• III• <b>±</b> mannangala an
irst 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	com	1
Patte	Smith	patte.smith@gmail.com		
Russ	Smith	russ.smith@gmail.com		
Tonia	Smith	tsmith@gmail.com		1
Previous 1 Next				6 Results   Page 1 of

Figure 1.15 – Service Contacts 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 or a member of your firm submitted.

EFILE QA 01 Reports			?-	<b>.</b>	<b></b> -	<b>1</b>	
ports							
	ctions against envelopes submitted during a selectable time frame up to 60 of	days. * Provides envelope and filing level information specific to fees. * De	livered in an Excel spre	adsheet to al	low for filtering	and searching.	
eated By	Location						
My Filings	All SELECT						
) My Firm							
tus		Date From \star		Date To 🗚			_
All Statuses			<b></b>				Ċ
Accepted	Reviewed						
Cancelled	Served	Date From is Required.		Date To	is Required		
Receipted	<ul> <li>Submission Failed</li> </ul>						
Returned	<ul> <li>Submitted</li> </ul>						
						CANCEL DOWN	LOAD REPOR
						CANCEL DOWN	LUAD REPOR

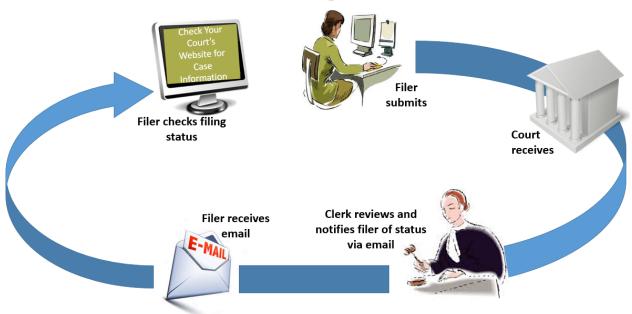
Figure 1.16 – Reports Page

# **2** E-Filing Overview

#### Topics covered in this chapter

#### Filing Queue Status

This section describes the e-filing process.



## The E-Filing Process

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

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

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

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

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

## Filing Queue Status

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

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

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

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

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



#### Topics covered in this chapter

- Registering as a Firm Administrator
- Resetting Your Password
- Updating Firm Information

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

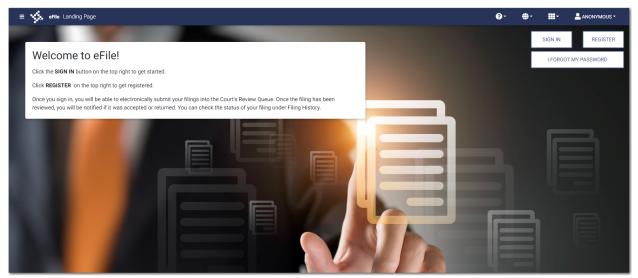


Figure 3.1 – eFile Landing Page

## Registering as a Firm Administrator

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

REGISTER

1. On the *Landing* page, click

The Registration - Select Type page is displayed.



Figure 3.2 – Registration - Select Type Page

FIRM 2. Click

The Registration - User Information page is displayed.

■ Sefile Registration - User Information				<b>?</b> -	<b>.</b> -	<b></b> -	ANONYMOUS -
Select Type User Information Firm Information							
First Name *	Middle Name		Last Name \star				
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.

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

Figure 3.4 – Registration - Firm/Contact Information Page

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

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

🎪 eFile Terms And Conditions	<b>?</b> -	•-	<b></b> -	ANONYMOUS
Tile Usage Agreement elcome to the online services of Tyler Technologies for QonoS. Please read this Agreement carefully. It governs Your access to and use of the Odyssey File & Serve application through the Tyler Technolog te and/or other Tyler products is conditioned upon Your acceptance of this Agreement. By clicking on the "LAccegt" button, You are agreeing to be legally bound by all of the terms and conditions of this Agreement will blind Your employer and that You are authorized to do so. As used in this Agreement, "You" or "Your" includes You and Your employer.				
ction 1. Definitions en Use ction 2. License, Restrictions on Use ction 3. Access to the Tyler Internet Site				
ection 4. Limitations on Use ection 5. Fee Schedule ection 6. Proprietary Rights				
section 7. Disclaimers and Limitations section 8. Your Warranties and Indemnification section 9. Limitations of Liability				
ction 10. Arbitration ction 11. Miscellaneous				
ection 1. 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 an thorized or otherwise designated or permitted by You to access and use the Tyler Services pursuant to the License. "E-Document" refers to any document or discrete compilation of text and/or graphical to the dolyssey File & Serve program. "Enhancement" means any correction, modification, customization, revision, enhancement, improvement, update, upgrade, new release or other change that is release projects. "Ecs Schedule" means Tyler Surrent See Schedule for use of the Tyler Services, are may be altered or amended from time to time by Tyler. "Information" means the tercords, data databases, docume rough the Tyler Services. "License" means the limited license granted to You under this Agreement. "Proprietary Rights" means any patent, copyright, trademark, service mark, trade secret or other intellect notent, records, data, documents, materials, or other information supplied to Tyler pursuant to an agreement with a hitid party for inclusion as part of, or for use with, the Tyler Services. "Tyler" means Tyler" visions. "Tyler Internet Ster" means the Tyler difficult and the Schedule of the Tyler Services the type of inclusion as part of inclusion as part of, or for use with, the Tyler Services. Tyler Services the type and the Tyler Services from Tyler from the to time. Tyler Technology" means any know-how, processes, methodologies, specifications, design endods, applications, computer programs, user manuals, on-line documentation, products or other technology and materials of any know-how, processes, methodologies, specifications, design epide to You, any Authorized User or acress take or Information that is not expressly authorized user means any use, reproduction, distribution, disposition, possession, disclosure or other activity, including spech Authorized User for access to and use of the Tyle	nformation d generally ents, mater ual property Technologie eans, collec s, invention erformance , without lin	n electroni by Tyler Ter ials, and ot right. "Thin es, Inc. and tively, Tyler s, functiona of the Tyle nitation, an	c form suit chnologies her informa rd Party Cor its operatir 's Odyssey ality, graphic er Services y bulk resel	able for submissio for the Tyler ation accessible ntent" means any ng units and File & Serve cs, techniques, or made available lling involving any
1 License. ubject 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 sers to access and use the Tyler Services subject and according to the terms of this Agreement solely for Your internal use in the regular course of Your business; (b) subject to any applicable third party rij				

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.

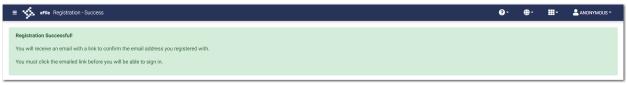


Figure 3.6 – Registration - Success Page

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-Tems

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.

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	E

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.

# **Updating Firm Information**

You can update the firm's information.

To update the firm's information:

1. On the Dashboard menu, click Firm Details.

The Firm Details page is displayed.

≡ 🐝 eFile Firm Details			<b>⊙</b> • ⊕• Ⅲ• <b>≜</b> mare to suppose the
USERS	ATTORNEYS	PAYMENT ACCOUNTS	FIRM DETAILS
Firm Nume ABC Test Firm Country United States e			
Address Line 1 * 5101 Tennyson Pkwy		Address Line 2	
Cov & Hundon Kiny Plano Remote Autor & 9727133770	State * Texas	zip Code <b>★</b> ▼ 75024	
			SAVE

SAVE

Figure 3.10 – Sample Firm Details Page

2. Update any information as needed, and then click



## Topics covered in this chapter

- ♦ Signing In
- Signing Out

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

# Signing In

Note: Click

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

## REGISTER

to register if you have not registered before.

## To sign in to the application:

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

Sign	n	×
\$	odyssey <sup>,</sup> identity provider a tyler courts & justice solution	
	• Please sign in to continue	
	Email	
	Email Password	
	Password	
	Sign In	
Forg	ot your password? RESET PASSWORD CLOS	E

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?.

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. Click the drop-down arrow at the top right of the header next to your initials.

The Manage Account window is displayed.

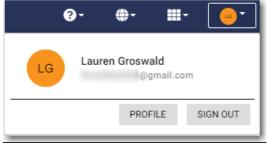


Figure 4.2 – Manage Account Window

SIGN OUT

2. Click

You are now signed out of the application.

# 5 Manage Account

## Topics covered in this chapter

- Changing the User Password
- ♦ Updating the User Profile
- Selecting Email Notifications

You can manage some of your account settings in the application.

The settings you can manage are:

- Change your password
- Update your user profile
- Select your email notifications regarding your case filings

# Changing the User Password

You can change your password on the Change Password page.

### To change your password:

1. Click the drop-down arrow at the top right of the header next to your initials.

The Manage Account window is displayed.

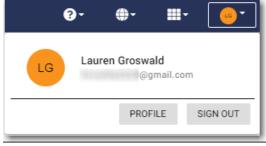


Figure 5.1 – Manage Account Window

2. Click PROFILE .

The Profile page is displayed.

3. Click Change Password.

The Change Password page is displayed.

=-		@-	⊕- Ⅲ-	•• •
CHANGE PASSWORD	PROFILE	EMAIL NOTIFICATIONS	3	
Change Password				
Old Password 🗚				
Old Password is Required.				
New Password 🕷	Re-enter New Password			
New Password is Required.				
				SAVE

Figure 5.2 – Change Password Page

- 4. Type the old password in the **Old Password** field.
- 5. Type the new password in the New Password field.

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

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



Your password is changed.

# Updating the User Profile

You can update your user profile on the Profile page.

To update your user profile:

1. Click the drop-down arrow at the top right of the header next to your initials.

The Manage Account window is displayed.

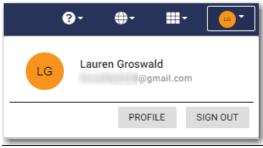


Figure 5.3 – Manage Account Window



The Profile page is displayed.

=- 🤹 EFILE QA 01 - EFM QA1 Profile		Q-	<b>.</b>	<b></b> -	<u>•</u> •
CHANGE PASSWORD	PROFILE	EMAIL NOTIFICAT	ONS		
First Name * Lauren Enal * @gmail.com	Mdde Name	LastName * Groswald			
					SAVE

## Figure 5.4 – Profile Page

- 3. Verify that your name is displayed correctly, and make changes, if needed.
- 4. Verify that your email address is correct, and make changes, if needed.



# **Selecting Email Notifications**

You can select the email notifications that you want to receive for case filings on the *Email Notifications* page.

To select your email notifications:

1. Click the drop-down arrow at the top right of the header next to your initials.

The Manage Account window is displayed.

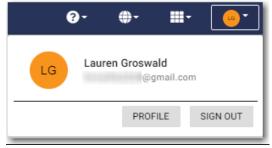


Figure 5.5 – Manage Account Window

2. Click

The Profile page is displayed.

3. Click Email Notifications.

The Email Notifications page is displayed.

E- 🌾 EFILE QA 01 - EFM QA1 Email Notifications		@• ⊕• Ⅲ• <mark>⊝</mark> •
CHANGE PASSWORD	PROFILE	EMAIL NOTIFICATIONS
Accepted Email	Rejected Email	Receipted Email
Submission Failed Email	Submitted Email	Service Undeliverable Email

Figure 5.6 – Email Notifications Page

4. Select the check box for each type of email notification that you want to receive for your case filings.

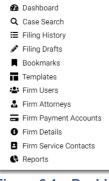




## Topics covered in this chapter

#### Dashboard Page

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



#### Figure 6.1 – Dashboard

From here, you can perform the following actions:

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

# Dashboard Page

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

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

Figure 6.2 – Dashboard Page

## Account Setup

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

Y	′ou are not ready	to file electronically!		×
	A payment account a	nd an attorney are required to file electronically.		
	CREATE PAYMENT	Missing Ready		
			REMIND ME L/	ATER

Figure 6.3 – Warning Message

## Start Filing

START FILING

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

## **Filing History**

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

					<b>0</b> - ⊕- <b>Ⅲ</b> -	A
Filing History Filter	FILING HISTORY FILING DRAFTS	Ν				10 Result(s) Page 1 of 1
Created By	Envelope # 16524	.1				
My Filings     My Firm	Envelope # 163241 Submitted 01/28/2020 3	Filing Code	Filing Type	Filing Description	Client Ref #	
Status	Submitted	Appointment	eFile Only			
All Statuses     Accepted     Cancelled	Envelope # 165228 Envelope # 165228 Submitted 01/28/2020 1	8 0.39 AM on behalf of Sam Smith by Firm Admin				
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8
O Submitting	Case # 1234					🖻 🗈 🗄
Location	Envelope # 165224 Submitted 01/28/2020 8	47 AM on behalf of Sam Smith by Firm Admin				
Any Location	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Case Number / Envelope Number	Accepted	Action - Subsequent Only	eFile and Serve			
Case Number	Envelope # 16522					
Envelope Number	Envelope # 165223 Submitted 01/28/2020 8	:29 AM on behalf of Sam Smith by Firm Admin				
	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Date Range	SubmissionFailed	Appendix	eFile Only			
Anytime     Last Month     Last Week	Case # CC-19-347 Envelope # 165222 Submitted 01/28/2020 8	27 23 AM on behalf of Sam Smith by Firm Admin				
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Hef #	8
From Date	Envelope # 16522	1				
To Date		17 AM on behalf of Sam Smith by Firm Admin				
RESET FILTER	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
	UnderReview	Complaint - w/ Hearing	eFile Only			

Figure 6.4 – Filing History Page

## Drafts

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

≡ 🐝 eFile Filing Drafts					<b>?</b> -	⊕- Ⅲ-	
Filing Drafts Filter	FILING HISTORY FILI	NG DRAFTS					23 Result(s) Page 1 of 2
Created By	Case # CC- Draft # 6749 Started 11/5/19						
My Filings		,					
O My Firm	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
Location	Draft	-	eFile Only				
	Draft # 672	2					▶  ╤  :
Any Location	Draft # 6722 Started 10/31/	19 2:33 PM by Firm Admin					
Case Number / Draft Number	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
Case Number	Draft	Acknowledgement	eFile and Serve	Acknowledgement			
Draft Number	Case # CC-	19-3477					
Date Range	Draft # 6702 Started 10/30/	19 2:30 PM on behalf of Jack Stone by Firm Admin					
Anytime     Last Month	Filing Status UnexpectedError	Filing Code Acknowledgement	Filing Type eFile and Serve	Filing Description Acknowledgement		Client Ref #	
O Last Week	Draft # 668	9					
O Last Two Days O Today	Draft # 6689 Started 10/28/	19 5:31 PM on behalf of Abby Carmichael by Firm Ad	Imin				
O Pick a Custom Range	Filing Status	Filing Code	Filing Type	Filing Description		Client Ref #	
From Date	Draft	Proposed Order	eFile Only	Proposed Order			
	Case # cc-1	45333					
To Date	Draft # 5611 Started 10/15/	19 9:18 AM by Firm Admin					
RESET FILTER	Case # CC-	19-3477					
	Draft # 5610 Started 10/15/	19 9:17 AM by Firm Admin					

Figure 6.5 – Filing Drafts Page

## **Case Search**

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

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

Figure 6.6 – 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.

SEARCH

- File into Existing Case Window—Excludes Party Name Option Figure 6.7

If your search does not produce any results, click	← DASHBOARD	to return to the	e Da	shbo	<i>ard</i> page.
= 🏡 eFile Case Search		0-	<b>.</b>	<b></b> -	
← DASHBOARD					REFINE SEARCH



## **Bookmarks**

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

= 🐝 eFile Bookmarks				<b>?</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 6.9 – Sample Bookmarks Page

## Templates

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

= 🐝 eFile Templates			<b>?</b> -	<b></b> -	• •••••••••••••••••••••••••••••••••••
Filter Type Name Filter Type Filter Type	FILTER	RESET			ADD TEMPLATE
Favorite	Name	Туре			Actions
*	Tech Pubs Test	New Case			۱
☆	test	Existing Case			<i>I</i>
☆	Template XYZ	New Case			🖻 🖍 🗄
☆	Template ABC	New Case			🖻 🖍 🗄
Previous 1 Next					4 Results Page 1 of 1

Figure 6.10 – Templates Page

# 7 Firm Administrator Functions

## Topics covered in this chapter

- Manage Firm Users
- Manage Attorneys

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

# Manage Firm Users

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

## Adding a New User to the Firm

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

## To add a new user to your firm:

1. On the Dashboard menu, click Firm Users.

The Firm Users page is displayed.

	USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
Name		.ast Name	Email	FILTER RESET		ADD USE
irst Name	Middle Name	Last Name	Email	Firm	Criminal	Actions
irm		Admin	gmail.com	Admin	Admin + Filer	1
ohn		Doe	jdoe@abcfirm.com		Filer	1
reddy		Jones	gmail.com		Filer	1
ane		Smith	jane.smith@xyzfirm.com			1
m		User	gmail.com		Filer	1
Previous 1 Next						5 Result(s) Page





Additional fields are displayed in a pane.

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

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

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

6. Click EDIT to assign the Criminal Filer role.

The Edit user criminal filer role window is displayed.

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

Figure 7.2 – Edit User Criminal Filer Role Window

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

DONE

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



First Name	Middle Name	Last Name	Email		Firm	Criminal	Actions
							1
First Name * Firm Email * firm.person@abcd.com		Middle Name		Last Name * Person			
Roles Firm Admin		Criminal Firm Admin		Criminal Filer No	EDIT		
	vill receive two emails: hem that they were invited by you to join eset their password so they can sign in to						
							CANCEL INVITE

Figure 7.3 – Sample New Firm User Pane

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

## Editing a Firm User's Information

To edit a firm user's information:

1. On the Dashboard menu, click Firm Users.

The Firm Users page is displayed.

	USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
t Name	Last	Name	Email	FILTER RESET		ADD USE
irst Name	Middle Name	Last Name	Email	Firm	Criminal	Actions
īrm		Admin	gmail.com	Admin	Admin + Filer	1
lohn		Doe	jdoe@abcfirm.com		Filer	1
reddy		Jones	gmail.com		Filer	1
ane		Smith	jane.smith@xyzfirm.com			1
irm		User	gmail.com		Filer	1

Figure 7.4 – Firm Users Page

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

The information for the specified firm user is displayed.



3. Update the necessary information, and then click

SAVE

## Removing a User from the Firm

To remove a user from the firm:

1. On the Dashboard menu, click Firm Users.

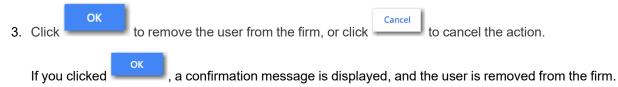
## The Firm Users page is displayed.

	USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
t Name	La	st Name	Email	FILTER RESET		ADD USER
First Name	Middle Name	Last Name	Email	Firm	Criminal	Actions
Firm		Admin	gmail.com	Admin	Admin + Filer	1
John		Doe	jdoe@abcfirm.com		Filer	1
Freddy		Jones	gmail.com		Filer	1
Jane		Smith	jane.smith@xyzfirm.com			1
Firm		User	gmail.com		Filer	1
Previous 1 Nex						5 Result(s) Page 1 o



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

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



# Manage Attorneys

The Firm Administrator is responsible for managing firm attorneys.

## Adding an Attorney to the Firm

To add an attorney to the firm:

1. On the Dashboard menu, click Firm Attorneys.

The Attorneys page is displayed.

USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
t Name	Last Name	Bar Number	<b>FILTER</b> RESET		
First Name	Middle Name	Last Name	Bar Number		Actions
bby		Carmichael	123		1
Perry		Mason	123		1
ack		Stone	123		1
Previous 1 Next					3 Results Page 1 o

Figure 7.6 – Attorneys Page



The New Attorney section is displayed.

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

Figure 7.7 – New Attorney Section

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



## Editing a Firm Attorney's Information

To edit a firm attorney's information:

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

The Attorneys page is displayed.

≡ 🐝 eFile Attorneys			Ø	 <b></b> -	2 marticentignani.com •
US	ERS	ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
First Name	Last Name	Bar Number	FILTER RESET		ADD ATTORNEY
First Name	Middle Name	Last Name	Bar Number		Actions
Abby		Carmichael	123		1
Perry		Mason	123		1
Jack		Stone	123		1
Previous 1 Next					3 Results Page 1 of

SAVE

Figure 7.8 – Attorneys Page

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

## Removing an Attorney from the Firm

To remove an attorney from the firm's list:

1. On the Dashboard menu, click Firm Attorneys.

The Attorneys page is displayed.

= 🐝 eFile Attorneys				<b>9</b> - +	- III -	▲ magnices ngaaa.com •
USERS		ATTORNEYS	PAYMENT ACCOUNTS			FIRM DETAILS
irst Name	Last Name	Bar Number	FILTER RESET			ADD ATTORNEY
First Name	Middle Name	Last Name	Bar Number			Actions
Abby		Carmichael	123			1
Perry		Mason	123			1
Jack		Stone	123			1
Previous 1 Next						3 Results Page 1 of

Figure 7.9 – Attorneys Page

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

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

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



### Topics covered in this chapter

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

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

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

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

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 Firm Payment Accounts.

The Payment Accounts page is displayed.

■ Serile Payment Accounts			0-	 2. TEMPETAL CONTINUES AND A CONT
USERS		ATTORNEYS	PAYMENT ACCOUNTS	FIRM DETAILS
ccount Name	Account Type Select	Account Status Select	• FILTER RESET	
Payment Account Name	Payment Account Type	Status	Last 4 Digits	Actions
Firm's CC	Credit Card	Active	5454	1
Mary Ann's Waiver	Waiver	Active		1
New Mastercard	Credit Card	Active	5454	1
Previous 1 Next				3 Results Page 1 o





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 8.2 – New Payment Account Window

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

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

# Adding a Credit Card Payment Account

To set up a credit card payment account:

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

The Payment Accounts page is displayed.

		<u>.</u>	• •• •••	🛓
	ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
Account Type Select	Count Status	• FILTER RESET		
Payment Account Type	Status	Last 4 Digits		Actions
Credit Card	Active	5454		1
Waiver	Active			1
Credit Card	Active	5454		1
				3 Results Page 1 o
	Select Payment Account Type Credit Card Waiver	Account Type Account Steinus Select  Select Payment Account Type Status Credit Card Active Waiver Active	ATTORNEYS     PAYMENT ACCOUNTS       Account Type     Account Status       Select     •       Payment Account Type     Status       Credit Card     Active       Waiver     Active	Attorneys     Payment Account Status       Payment Account Type     Status       Payment Account Type     Status       Credit Card     Active       Waiver     Active





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

Figure 8.4 – New Payment Account Window

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

ENTER INFORMATION

The Enter Information window is displayed.

Enter Info	rmation		×
🔆 ty	er	1/10	
Paymen	t Information		
	Method of Payment Credit Card e-Check		
		ALLER RECEIPT	

Figure 8.5 – Enter Information Window

5. Select the Credit Card option.

The Payment Information pane is displayed.

Enter Information		×
<b>Sector Explor</b> <b>Payment Informat</b>	ion	
Method of Payme © Credit Card © e-Check		
Cardholder Infor Enter the informati asterisk (*) are rec	on as it appears on the Cardholder Account. The fields marked with a red	
Car	d Type 🛛 🔻 *	
Card N	umber *	
Exp	Month MM * Exp Year YYYY *	
cv	V Code * CVV Help	
Name o	n Card Maximum of 30 characters	
Addres	s Type 🛛 US 🔘 Foreign	
Address	Line 1 Street address, P.O. box, company name, c/o	
Address	Line 2 Apartment, suite, unit, building, floor, etc.	
	City *	
	State v *	
Zi	p Code	
	Continue	

Figure 8.6 – Payment Information Pane

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

Continue

13. After completing all of the required fields, click

The Verify Billing Information pane is displayed.

Enter Info		×
Verify B	Silling Information	
	Billing Detail	
		MASTERCARD
	Card Number Exp Date	************5454
	CVV Code	
	Name on Card	
	Address Type	US
	Address Line 1	123 Main St.
	Address Line 2	
		Plano
	State	
	Zip Code	75024
	Terms and Conditions This is a confidential and secure site that doe third parties. By setting up this account you a conditions.	
		Back Save Information

Figure 8.7 – Verify Billing Information Pane

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

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

To set up an e-check payment account:

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

The Payment Accounts page is displayed.

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

Figure 8.8 – 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	et.		
Account Name is Required.				
				CANCEL CREATE WAIVER
Waiver	Waiver	Active		1
First Previous 1 Next Last				1 Result(s) Page 1 of 1

Figure 8.9 – New Payment Account Window

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

ENTER INFORMATION

The Enter Information window is displayed.

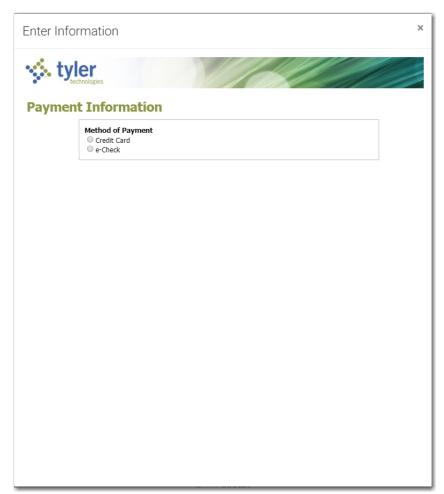


Figure 8.10 – Enter Information Window

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 ap 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 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	*
	Continue

Figure 8.11 – 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.

Verify Billing Information Billing Detail Account Type Checking Account Number ****5678	×
Billing Detail Account Type Checking	
Account Type Checking	
Account Number ****5678	
Routing Number 113000023	
Name on Account Joe Smith	
Address Type US	
Address Line 1 123 Main St.	
Address Line 2	
City Plano	
State TX	
<b>Zip Code</b> 75024	
Terms and Conditions This is a confidential and secure site that does not disseminate confidential information to third parties. By setting up this account you agree to comply with this site's terms and conditions.	
Back Save Information	

Figure 8.12 – Verify Billing Information Pane

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

click and make any necessary changes.

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

# **Editing a Payment Account**

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

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

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

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

The Payment Accounts page is displayed.

≡ 🐝 eFile Payment Accounts			G	9- ⊕- Ⅲ-	THEFT, THE TURN IN THE TAXABLE CONT.
USERS		ATTORNEYS	PAYMENT ACCOUNTS		FIRM DETAILS
ccount Name	Account Type Select	Account Status     Select	• FILTER RESET		
Payment Account Name	Payment Account Type	Status	Last 4 Digits		Actions
Firm's CC	Credit Card	Active	5454		1
Mary Ann's Waiver	Waiver	Active			/
New Mastercard	Credit Card	Active	5454		1
Previous 1 Next					3 Results Page 1 of

Figure 8.13 – Payment Accounts Page

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

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

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

type the new name. Then, click

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

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

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

Then, click

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

SAVE

# **Deleting a Payment Account**

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

To delete an existing payment account:

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

The Payment Accounts page is displayed.

≡ 🐝 eFile Payment Accounts				<b>?</b> - ⊕-	•	<b>.</b>
USERS		ATTORNEYS	PAYMENT ACCOUNTS			FIRM DETAILS
count Name	Account Type Select	Account Status	• FILTER RESET			ADD ACCOUNT
Payment Account Name	Payment Account Type	Status	Last 4 Digits			Actions
Firm's CC	Credit Card	Active	5454			1
Mary Ann's Waiver	Waiver	Active				1
New Mastercard	Credit Card	Active	5454			1
Previous 1 Next						3 Results Page 1 o

Figure 8.14 – Payment Accounts Page

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

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

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

# **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
- View Case Judicial Officer

START FILING

. This

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

i -

Note: While you are entering a case filing, click

to view the case number or draft number.

≡ 🐝 eFile Dashboard 🔞 • ∰• ▓• 🛓					
Start Filing	Filing History	Drafts			
Click on START FILING to select your filing options. You could initiate a case or file into an existing case.	Envelope # 165149 Envelope # 165149 Submitted at 01/24/2020 9:22 AM Filings: Submitted (1)	Draft # 9063 Draft # 9063 Started at 01/22/2020 3:55 PM Draft # 9062			
	Envelope # 745447 Envelope # 745447 Submitted at 12/16/2019 4:54 PM Filings: Submitted (1)	Draft # 9062           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)	Utalt # 9000 Statted 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			

START FILING

Figure 9.1 – Dashboard Page

# Starting a New Case Filing

Start a new case filing from the *Dashboard* page. To start a new case filing:

1. On the *Dashboard* page, click

The Start Filing page is displayed.

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

Figure 9.2 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

EFILE QA 01 Start Filing	Ø· ⊕- Ⅲ- ≜
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Loadion * OFS MockCMS *	
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
← DASHBOARD	
3	
	() Help
Eiguro 0.3 – Start Filing Page with Case Papes Di	icplayod

Figure 9.3 – 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.

Note: While you are entering a case filing, click

to view the case number or draft
number.

Filing Service Free Summary

Preload Documents	Case	Parties	Filings	Service	Fees	Summary		l
								l
						🗅 Drag	files here or BROWSE	l
						<b>D</b> rug		l
Maximum Filesiae: 50.00 MB Supportied 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).								
oupported the types. In Ed.		e bostinent i ne (r				) Hold 2007 The (Do		l
SAVE DRAFT AND EXIT								l
								1



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.

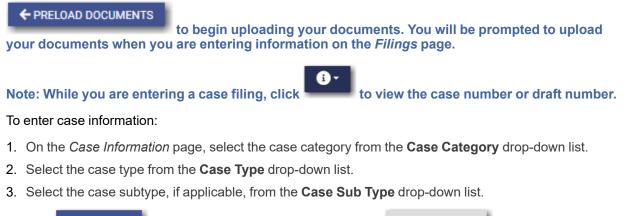
# **Entering Case Information**

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 9.5 – 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.

=- 🐝 EFILE QA 01 - EFM QA1 Case Information - Draft # 4333 🚯 -				<b>?</b> -	<b>.</b> -	•••	100010000g0000.000
Preload Documents Case Parties Filings Service Fees	s Summary						
is is test content on case info page for firms.							
ocation *		Case Category *					
OFS QA 2017	\$	Civil					× *
ase Type *							
Notice Of Removal	>	*					
rocedures / Remedies		Damage Amount					
SELECT		Select					•
Case Address							
Country *							
United States •							
Address Line 1 *							
Address Line 1 is Required.							
City *	State *			Zip Code \star			
	Select		٠				
City is Required.	State is Required.			Zip Code is Required.			
County ★							
County is Required.							
County is Required.							
County is Required.							

Figure 9.6 – 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 9.7 – 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 Fee	es Summary		
This is test content on case info page for firms.				
Location * OFS QA 2017		× *	Case Category * Civil	× •
Case Type <b>*</b> Select		Ţ		
Case Type is Required.				
Procedures / Remedies SELECT		Ç.	Banagi Anout Select	:
← PRELOAD DOCUMENTS SAVE DRAFT AND EX	т			PARTIES ->

Figure 9.8 – 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 Procedure	es / Remedies	
Select	Procedure / Remedy	
Select	Flocedule / Kelliedy	
	Appeal	
	Class Action	
	Garnishment	
		CANCEL SAVE

Figure 9.9 – 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 9.10 – 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> ∙ ⊕• <u>Ⅲ</u> • <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 Catagory *
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.
- 5. In the **Case Cross Reference Type** section, type the six-digit case cross reference number in the **Case Cross Reference Id** field.

🚍 🔹 🎪 EFILE QA 01 - EFM QA1 Case Information - Draft # 4344 🔞 -	Ø- <del>-</del>	
Preload Documents         Case         Parties         Filings         Service         Fees         Summary		
This is test content on case info page for firms.		
Location *	Case Category *	
OFS QA 2017	× 👻 Civil	x +
Case Type *		
City Ordinance Cases - \$10.00	X *	
Procedures / Remedies	Damage Amount	
SELECT	Select	•
		•
		ADD CASE CROSS REFERENCE
Case Cross Reference Type Ca	e Cross Reference Id	Action
* Case Cross Reference Number +		
* Warrant Number (CM)		
c	ss Reference Type "Warrant Number" is required and must be 6 numbers long	
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT		PARTIES ->

Figure 9.12 – 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 9.13 – 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.

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

Figure 9.14 – 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> - ⊕- <b>Ⅲ- ≜</b>
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	
6	
	() Help
Eigure 0.45 Stort Filing Page with Coop Pages D	

Figure 9.15 – 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.

eload Documents	Case	Parties	Filings	Service	Fees	Summary									
Crag files here or BROWSE															
aximum Filestar: 50.00 MB portrait File Typer: 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).															



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>Ⅲ</b> • <b>≜</b>
Preload Documents Case Parties Filings Service Fees Sur	nmary
This is test content on case info page for firms.	
Location 🗚	Case Category *
OFS QA 2017 × 👻	Probate or Mental Health × -
Case Type 🔸	Case Sub Type
Probate of Will × +	Select ¢
Will Filed Date * 09/10/2021	
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT	PARTIES →

Figure 9.17 – 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.

=- 🤹 EFILE QA 01 - EFM QA4	Parties - Draft # 4279	<b>0</b> -			<b>9</b> -	<b>.</b>	<b></b> -	L
Preload Documents Case	Parties Filing	s > Service > Fees >	Summary					
Party Type F	Required Party	Party Name		Lead Attorney				Actions
Petitioner 1	This is a required Party							<b>A</b>
Personal 🛕 Address	Additional Ident	ifiers						Hide Details
Party Type Petitioner								
Personal Information								
Person C 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
Respondent 1	This is a required Party							<b>A</b>
								ADD PARTY
← CASE INFORMATION SAVE DRAI	FT AND EXIT		G					FILINGS ->

Figure 9.18 – Personal Tab on the Parties Page

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

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

- 1. On the Personal tab, select Person or Entity.
- 2. Complete the **First Name**,**Middle Name** (if applicable), and **Last Name** fields. Also, if appropriate, select the party's suffix from the **Suffix** drop-down list.
- 3. Type the party case management system ID in the Party CMS ID field, if appropriate.
- 4. Select a language from the Interpreter drop-down list, if appropriate.

ADD/EDIT ATTORNEYS

5. Click

to select the filing attorney.

The Attorneys window is displayed.



to view the case number or draft number.

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

Figure 9.19 – Attorneys Window

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

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

LEAD ATTORNEY

Attorneys	Lead Attorney	
Remove	Name	Lead Attorney
$\checkmark$	Abby Carmichael	0
$\checkmark$	Perry Mason	•
ATTORNEY	5	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	<i>d</i> <sup>*</sup>
Plaintiff	This is a required Party	Thomas Plaintiff	Sam Smith	<i>i</i> t and the second sec
Personal Addre	Additional Identifiers			Hide Details
Country United States Address Line 1		\$	Address Line 2	
City		State Select Phone Number	Zp Code	
				GO TO ADDITIONAL IDENTIFIERS

Figure 9.21 – Address Tab on the Parties Page

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

11. Click	GO TO ADDITIONA	L IDENTIFIERS	to add more information for the specified par	ty.
Party Type	Required Party	Party Name	Lead Attorney	Actions
Defendant	This is a required Party	John Doe		1
Plaintiff	This is a required Party	Susan Doe		ø
Personal	Address Additional Identifiers			Hide Details
This is test content f	for Firm-Party-Additional Identifiers.			
Driver License Type		Driver License State	Driver License Number	
Select	+	Select	*	
Social Security Number				
Date of Birth	_	Gender		
MM/DD/YYYY	<b></b>	Select	•	

Figure 9.22 – Additional Identifiers Tab on the Parties Page

- 12. Select the type of driver's license from the Drivers License Type drop-down list.
- 13. Select the state where the driver's license was issued from the Drivers License State drop-down list.
- 14. Type the party's driver's license number in the **Drivers License Number** field.
- 15. Type the party's Social Security number in the Social Security Number field.

Note: After you type the Social Security number, asterisks are displayed to hide the number.

- 16. Type the party's date of birth in the **Date of Birth** field, or click to select the date from the calendar.
- 17. Select the party's gender from the Gender drop-down list.

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

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

20. If you have another party to add to the case, click have been added to the case.

🔂 ADD PARTY

Continue to add parties until all parties

FILINGS -> 21. Click

to save your work and to continue.

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

My Drafts. Locate the specified draft, and then clic

1.	
ĸ	-

## 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	QA4 Parties - Draft # 4279	• • •			<b>9</b> -	<b>•</b> -	<b></b> -	2 TRAFTLE TRAFTLE TRAFT.
Preload Documents Case	Parties Filin	gs 🛛 Service 🔷 Fees 🔪 Summ	nary					
arty Type	Required Party	Party Name		Lead Attorney				Actions
etitioner	This is a required Party							<b>(</b>
Personal 🛕 Addre	ess Additional Ider	ntifiers						Hide Detail
Party Type Petitioner								
Personal Information  Person  Entity								
First Name *		Middle Name		Last Name \star	s	Select		÷
First Name is Required.				Last Name is Required.				
Party CMS ID		Interpreter Select	\$					
Attorney Information								
ADD/EDIT ATTORNEYS								GO TO ADDRESS
pondent	This is a required Party							<b>A</b>
								🔂 ADD PAR
CASE INFORMATION SAVE	DRAFT AND EXIT	C	b					FILINGS •

Figure 9.23 – Example of the Personal Tab on a Parties Page

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

1. On the Dashboard page, click

START FILING

The Start Filing page is displayed.

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

Figure 9.24 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

EFILE QA 01 Start Filing	<b>0</b> ∙ ⊕• Ⅲ• <b>≜</b>						
Select Filing Location							
Select your filing location to see which types of filings are allowed at that location.							
Content * 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							
Ç≽							
	() Help						
Eiguro 9 25 – Start Eiling Page with Case Panes I	Displayed						

Figure 9.25 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Preload Documents page is displayed.

PARTIES ·

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

load Documents	Case	Parties	Filings	Service	Fees	Summary					
						🚹 Dra	g files here or	BROWSE			



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

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

5. Select each document to be uploaded.

### CASE INFORMATION ->

6. Click

12. Click

to continue with your filing.

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

The Case Information page is displayed.

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

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

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

ADD/EDIT ATTORNEYS 🚢

to select the filing attorney.

The Attorneys window is displayed.

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
		CANG	CEL LEAD ATTORNEY



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

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

LEAD ATTORNEY

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





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



to enter the address information for the first party.

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

Figure 9.29 – Example of the Address Tab on a Parties Page

17.	Comp	lete the	required	fields o	on the	Address	tab.	and then	click
	Comp		roquirou	100000		10000	uno,	and thom	SHOR

GO TO ADDITIONAL IDENTIFIERS

😑 🔸 efile qa 01 - efm qa	🗤 Parties - Draft # 4342 🕕				<b>?</b> -	<b>-</b>	<b></b> -	<b>1</b>
Preload Documents Case	Parties Filings	> Service > Fees > Sum	mary					
Party Type	Required Party	Party Name		Lead Attorney				Actions
Petitioner	This is a required Party	John Doe		Perry Mason				1
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	<b>(</b>					
Respondent		Mary Smith		Tim Andews				1
								ADD PARTY
CASE INFORMATION SAVE DF	RAFT AND EXIT							FILINGS →

Figure 9.30 – 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 . 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.

=- 🌾 EFILE QA 01 - EFM QA1 Filing	gs - Draft # 7709 👔 -				0- <del>0</del> -	-	<u>10</u> -
Preload Documents Case Par	rties Filings Service Fees	Summary					
Filing Code	Client Ref #	Filing Description				,	Actions
Abstract Of Judgment						<b>A</b>	Î
Details Optional Services A	Communication						Hide Details
Test Content filing details Firm. For more	e information visit: www.google.com						
Filing Type * eFile Only		Bing Code *     Abstract Of Judgmen	t - \$5.00				× •
Filing Description			Client Reference Number				
Comments to Court							-
add comment here							
					GO TO OP	TIONAL SERVI	CES
							-
Filing on behalf of  ASSOCIATED PARTIES							
							-
Documents*							
Component	Name	Actions	Description	Security			
Lead Document		SELECT DOCUMENTS	This document is required.				
Attachments		SELECT DOCUMENTS					
		SELECT DOCOMENTS					
L							
						_	DD FILING
← PARTIES SAVE DRAFT AND EXIT					SKIP TO FEES		) Help
		© 2021 Tyler Technologies, Inc.   All I	Rights Reserved   Version: 0.0.0.2054				EXPONENCE BY TYLER TECHNOLOGIES

Figure 9.31 – Sample Filings Page

Note: While you are entering a case filing, click

ij.

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

Note: Some courts require you to select an optional service. When an optional service is required, you must click the Optional Services tab and select the required service.

The Optional Services tab is displayed.

g Code	Client Ref #	Filing Description			Action
ract Of Judgment					<b>A</b>
Details Optional Services	Communication				Hide D
est content filing details optional se	ervices firm.				
Not Selected			Selected		
Once Per Party	\$10	÷	← Certified Copies *	?? × \$17	
Per Page Fee Service	₩ x	<b>→</b>	Multiplier *		
Priority Processing	?? x \$17	÷			
Split Fee Service	\$10	÷	Multiplier is Required.		
TOGA Decline Error	\$280	÷			
Garnishment I	?? x \$??	÷			
Garnishment II	\$??	÷			
Per Page Fee No Multiplier		<b>→</b>			
					GO TO COMMUNICATION

Figure 9.32 – Sample Optional Services Tab

7. To select the applicable optional services, click



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

Code	Client Ref #	Filing Description		Actic
act Of Judgment				🔺 🗹
Details Optional Services	Communication			Hide
est content filing details optional s	ervices firm.			
Not Selected			Selected	
Once Per Party	\$10	÷	← Certified Copies *	1 × \$17 = \$17
Per Page Fee Service	?? x	÷	Multiplier *	
Priority Processing	?? x \$17	÷	1	
Split Fee Service	\$10	→		
TOGA Decline Error	\$280	→		
Garnishment I	?? x \$??	÷		
Garnishment II	\$??	÷		
Per Page Fee No Multiplier		÷		
				GO TO COMMUNICATION

Figure 9.33 – Sample Optional Services Tab with an Optional Service Selected

Note: If you decide that you do not want to use a particular optional service that you have

selected, click . However, if a specified optional service is required by your court, you must select that service.

GO TO COMMUNICATION

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

ASSOCIATED PARTIES

9. Click

to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

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

### Figure 9.34 – 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.

	SAVE	1	
13. Click	_		
			SELECT DOCUMENTS

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.

Docume	nts <sup>*</sup>			
Component	Name	Actions	Description	Security
Lead Document		SELECT DOCUMENTS	This document is required.	
Attachments		SELECT DOCUMENTS		

Figure 9.35 – Documents Pane

Select document(s) for Lead Document				
Not Selected		Selected		
test.pdf	→ ■			
Academic_Calendar	→ 🗊			
	Drag files here of	BROWSE		
Maximum Filesize: <b>50.00 MB</b>				
Supported File Types: TIFF Files (TIFF Document File (PDF) XML Document (				e
			CANCEL	SAVE

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

Figure 9.36 – 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 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 ... Then, repeat the same steps for the next filing.
20. After you have added all of the filings, click either SERVICE → or SKIP TO FEES ...

# Capability for Filing a Return Date

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

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

Return Date	
Out Of State Service	
Return Date	
	ter 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 9.38 – 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 9.39 – Sample Return Date Pane with Valid Date Displayed

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

### Figure 9.40 – Return Date Pane with Error Message Displayed

After you complete your filing, the return date is displayed in the envelope details. If you requested out of state service, that information is also displayed in the envelope details.

Details - Envelope # 168796					PRINT CLOSE
Envelope Envelope 10 168796		Submitted by Lauren Groswald		Usamana @gmail.com	
Case Location OFS MockCMS		Category Civil		Type Breach Of Contract	
Hearing Hearing Start Date 11/01/2021		Hearing Start Time 4:00 PM		Hearing End Time 5:00 PM	
Return Date Return Date 11/11/2021			Out Of State Serv	vice	
Parties Count: 2					Show All
Filings					
Filling Code Abstract Of Judgment Status Codemisterd	Client Ref # Review Date		Filing Description	Submitted Data 11/01/2021 5:15 PM	
Submitted Component Lead Document Deventing Version Original	Document Name redactthis.pdf		Description	Security	
Service <sub>Count</sub> a None					
Fees					
Payment Account Lauren's Waiver Order ID	Filing Attorney Jack Stone Transaction Response		Party Responsible for Faes James Kirk Transaction Amount \$0.00	Filer Type Transaction ID	
					Total \$0.00

Figure 9.41 – Example of the Return Date and Out of State Service Option in the Envelope Details

## Selecting a Return Date for a Case Filing

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

To select a return date for a case filing:

1. From the Dashboard page, click

≡ 🐝 eFile Dashboard 8-**.**-• 2 Start Filing \* Filing History ≔ Drafts ø Ð Click on START FILING to select your filing options. You could initiate a case Envelope # 165149 Draft # 9063 or file into an existing case Envelope # 165149 Submitted at 01/24/2020 9:22 AM Filings: Submitted (1) Draft # 9063 Started at 01/22/2020 3:55 PM Draft # 9062 Draft # 9062 Started at 01/22/2020 3:54 PM Envelope # 745447 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) View Filing History View My Drafts Q Π Case Search Bookmarks Templates CC-15-1813 - \*\*\*\*\*\*\* OES 04 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 9.42 – Dashboard Page

START FILING

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.				
Loation * Select •				
Location is Required.				
← DASHBOARD				
2				
νγ				
				D Help

Figure 9.43 – 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.	
DFS 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	
La	
	C Help
Eiguro 9.44 – Start Eiling Page with Case Papes [	Jieplayod

Figure 9.44 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Preload Documents page is displayed.

BROWSE 4. Click to look for the documents that you want to upload. 5. Select each document to be uploaded. CASE INFORMATION -> 6. 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. 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. FILINGS 8. Complete the fields on the Parties page, and then click The Filings page is displayed. SERVICE -> 9. Complete the fields on the Filings page, and then click The Service page is displayed. FFFS 10. Select the service contacts, and then click The Fees page is displayed. SUMMARY -> 11. Complete the fields on the *Fees* page, and then click The Summary page is displayed.

eload Documents Case Parties	Filings Service Fees Summary	learing				
Return Date						
ut of State Service						
leturn Date					Return Date	
rturn Date		C VERIFY				
					Agreements	
Return date must be verified.					Case	
Return date must be verned.					Parties	
					Filings	
Case				1		
ocation	Category		Type		Service	
DFS MockCMS	Civil		Malpractice		Fees	
Parties				Show All	SUBMIT	
lount: 2						
					'	
Filings				1	Calculating Fees	
Filing Type	Filing Code	Client Ref #	Filing Description			
eFile Only	Acknowledgement					
Component Lead Document	Academic_Calendar_Fall_2019.pdf	Acknowledgement	Security			
Download Version	Academic_calendar_nal_2019.pdf	Acknowledgement				
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		D He
		© 2021 Tyler Technologies, Inc.   All Rights Reserved				<b>\$</b> 1000

Figure 9.45 – Return Date Pane on the Summary Page

12. On the Summary page, to select a return date:

a. If the respondent is located out of state, select the Out of State Service check box.

Return Date Out Of State Service	
Return Date 04/10/2020	

Figure 9.46 – Out of State Service Check Box Selected in the Return Date Pane

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



c. Click

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



Figure 9.47 – 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		
Return Date 04/06/2020	Ħ	VERIFY

Figure 9.48 – 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 9.49 – 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.

V offic	Schedule Hearing				<b>?</b> ~	••	<b></b> -	
chedule 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		ß	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						
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							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:

1. From the Dashboard page, click

START FILING

ESO-FS-220-4496 v.15

≡ 🐝 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
	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 9.51 – Dashboard Page

The Start Filing page is displayed.

= 🎪 EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	<b></b> -	2 martingani m-
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loaton # Select *				
Location is Required.				
← DASHBOARD				
6				
				() Help

Figure 9.52 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

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

Figure 9.53 – 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	<b>)</b> -				<b>?</b> ≁	<b>.</b>	•	•
eload Documents Case Pa	rties 🔪 Filings 🔪 Serv	ce 🔪 Fees 🔪 Su	mmary 🔶 Hea						
s is test content on case info page for firm	15.								
cation *					Case Category *				
OFS MockCMS				× *	Select				-
					Case Category is Required.				
se Type \star									
Select				-					
Case Type is Required.									
PRELOAD DOCUMENTS SAVE DRAFT.	IND EXIT							P	PARTIES -

Figure 9.54 – 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 🕕 -					<b>?</b> -	<b>.</b> -	<b></b> -	•
Preload Documents Case	Parties Filings	Service Fees Summary Hea	aring						
Party Type	Required Party	Party Name		Lead Attorney				A	Actions
Defendant	This is a required Party							▲ 🖉	
Personal 🛕 Address	Additional Identifiers								Hide Details
Party Type Defendant									
Personal Information									
Person     Entity     First Name *		Middle Name		Last Name *	Suffix Select				•
First Name is Required.				Last Name is Required.					
Party CMS ID		Select	\$						
Attorney Information									
ADD/EDIT ATTORNEYS							G	O TO ADDRE	ESS
Plaintiff	This is a required Party							4	]
								<b>O</b> A	DD PARTY
CASE INFORMATION SAVE DRA	AFT AND EXIT							FI	LINGS À

Figure 9.55 – Parties Page

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

FILINGS >

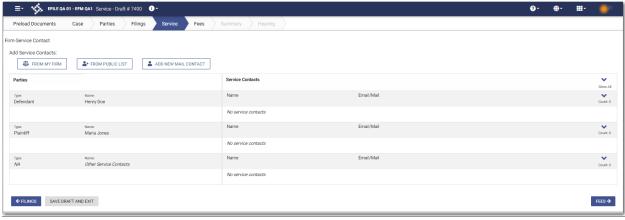
The Filings page is displayed.

≡- 🤸 EFILE QA 01 - EFM QA1 1	Filings - Draft # 7490 🛛 🔹 🕶		0· +· III· 🅌
reload Documents Case	Parties Filings Service Fees	Summary Hearing	
iling Code	Client Ref #	Filing Description	Actions
			A 🗾 🔳
Details 🛕 Optional Ser	vices Communication		Hide Details
Test Content filing details Firm. For	more information visit: www.google.com		
Filing Type *		Filing Code 🕸	
eFile Only		Select	*
		Filing Code is Required.	
Filing Description		Client Reference Number	
Comments to Court			
add comment here			
			<i>k</i>
			G0 T0 OPTIONAL SERVICES
Filing on behalf of <b>()</b>			
ASSOCIATED PARTIES			
Documents*			
Select a filing code before uploading do	icuments.		
			C ADD FILING
PARTIES SAVE DRAFT AND EXIT			SKIP TO FEES → → SERVICE →

Figure 9.56 – Filings Page

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

### The Service page is displayed.



SERVICE ->

Figure 9.57 – Service Page

FEES

10. Select the service contacts, and then click

The Fees page is displayed.



The Summary page is displayed.

SUMMARY ->

EFILE QA 01 - EFM QA1 Preload Documents Case	Summary-Draft #7490 0 - Parties Filings Service Fees Summary Heating				0-	⊕- ⊞-	٠
Return Date Out of State Service Reverse Service Reverse Service Return date must be verified.		9 VERY			Return Date Agreements Case Parties		
Case	Canagory Civil		Tops Collection	Does al	Filings Service Fees		
Filings Filings Filings Filings Filings Corporate Lead Document	Parag Costs Abstract Of Judgment Common Nama Academic, Calendar, Fail, 2019 (1) pdf	Class Ref # Description Abstract Of Judgment	Film Champion Secury				ß
Download Vestine Original Service Count 0 None		-		,			
Fees Payment Account Lauren's Waiver	ning Anong Jack Stone	Party Responsible for Piess Maria Jones	nie 1704 Default	1			
<b>CFEES</b> SAVE DRAFT AND EXIT	1			Total \$0.00 Waiver Selected SUBMIT	BACK TO TOP		D Help

Figure 9.58 – 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.

1900 C	<ul> <li>Schedule Hearing</li> </ul>				<b>3</b> - ⊕-		
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			
_							



SAVE

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.

≡ stille Filing History					Ø	•	• moneren: con regelanecom •
Filing History Filter	FILING HISTORY FIL	LING DRAFTS					2 Result(s) Page 1 of 1
Status	Envelope #						
All Statuses     Accepted     Cancelled	Envelope # 165244 Submit	ted 01/28/2020 3:53 PM by Pro Se Filling Code Acquittal	Filing Type eFile Only	Filing Description	Cilent R	ef #	8
Receipted     Served     Returned     Submitted	Envelope #	ted 01/24/2020 9:22 AM by Pro Se					
O Submitting Location	Filing Status Reviewed	Filing Code Acknowledgement	Filing Type eFile Only	Filing Description	Client R	ef #	2 Result(e) Page 1 of 1
Any Location •	Previous 1 Next						2 Resurt(s) Page 1 or 1
Case Number / Envelope Number							
Case Number							
Envelope Number							
Date Range							G
Anytime     Last Month     Last Week     Last Week     Last Two Days     Tody     Pick a Custom Range     From Date     To Date     To Date     RESET     FUTER							

Figure 9.60 – 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				
OFS MockCMS	Category Family		Type Division Of Property	
Parties Count: 2				Show All
Filings				G
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 reductthis.pdf	Description	Security	
Service <sup>Count 0</sup> Nome				
Fees				
Payment Account Walver Order ID	Filing Automey Peter John Parker Transaction Response	Party Responsible for Fees George Jones Transaction Amount \$0.00	Filer Type Default Transaction ID	
				Total \$0.00 Waiver Selected
				SCHEDULE HEARING CLOSE



SCHEDULE HEARING

4. Click

The Schedule Hearing page is displayed.

🎸 🕬	Schedule Hearing			3-	<b>⊕</b> - <b>Ⅲ-</b>	
chedule He	earing for Envelope #1	83167				
Select	Date	Start	End			
0	04/14/2020	8:00 AM	9:00 AM			
0	04/14/2020	9:00 AM	10:00 AM			
0	04/14/2020	10:00 AM	11:00 AM			
0	04/14/2020	11:00 AM	12:00 PM			
0	04/14/2020	12:00 PM	1:00 PM			
0	04/14/2020	1:00 PM	2:00 PM	ß		
0	04/14/2020	2:00 PM	3:00 PM			
0	04/14/2020	3:00 PM	4:00 PM			
0	04/14/2020	4:00 PM	5:00 PM			
0	04/15/2020	8:00 AM	9:00 AM			
Previous 1	2 3 4 5 Next		45 Result(s) Page 1	<b>A</b> 2		
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 QA	🗤 Filings - Draft # 7493 👔 =				0· +· II·
reload Documents Case	Parties Filings Service Fees	Summary			
ing Code	Client Ref #	Filing Description			Actions
reement (w/ Ad Damnum)					🔺 🗾 🗊
Details Optional Service	es Communication				Hide Detail
Test Content filing details Firm. Fi	For more information visit: www.google.com				
Filing Type * eFile Only		Filing Code *  a Agreement (w/ Ad Damnu	m)		× *
Filing Description			Client Reference Number		
Comments to Court					
add comment nere					
					GO TO OPTIONAL SERVICES
Filing on behalf of <b>3</b> ASSOCIATED PARTIES					
Documents*					
Component	Name	Actions	Description	Security	
Lead Document		SELECT DOCUMENTS	This document is required.		
Attachments		SELECT DOCUMENTS			
					🔂 ADD FILI
PARTIES SAVE DRAFT AND EX	at				

Figure 9.63 – 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

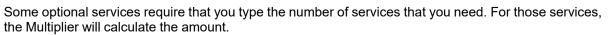
Note: Some courts require you to select an optional service. When an optional service is required, you must click the Optional Services tab and select the required service.

The **Optional Services** tab is displayed.

oad Documents Case	Parties Filings Service	> Fees > Summary >			
g Code	Client Ref #	Filing Description			Action
ract Of Judgment					🔺 🗹 🚺
Details Optional Services	A Communication				Hide D
est content filing details optional s	ervices firm.				
Not Selected			Selected		
Once Per Party	\$10	÷	← Certified Copies *	?? x \$17	
Per Page Fee Service	?? ×	÷	Multiplier *		
Priority Processing	?? × \$17	÷			
Split Fee Service	\$10	÷	Multiplier is Required.		
TOGA Decline Error	\$280	÷			
Garnishment I	?? x \$??	÷			
Garnishment II	\$??	÷			
Per Page Fee No Multiplier		÷			
					GO TO COMMUNICATION

Figure 9.64 – Sample Optional Services Tab

7. To select the applicable optional services, click



÷

Code	Client Ref #	Filing Description			A
act Of Judgment					🛕 🖉
Details Optional Services	Communication				1
est content filing details optional services	firm.				
Not Selected			Selected		
Once Per Party	\$10	÷	← Certified Copies *	1 × \$17 = \$17	
Per Page Fee Service	?? x	÷	Multiplier *		
Priority Processing	?? x \$17	÷	1 0		
Split Fee Service	\$10	<b>→</b>			
TOGA Decline Error	\$280	÷			
Garnishment I	?? x \$??	÷			
Garnishment II	\$??	<b>→</b>			
Per Page Fee No Multiplier		÷			
					GO TO COMMUNICAT
					GO TO COMMUNICAT

Figure 9.65 – Sample Optional Services Tab with an Optional Service Selected

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

However, if a specified optional service is required by your court, you must select that service.
 GO TO COMMUNICATION
 Click to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

9. Click

to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

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

#### Figure 9.66 – 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.

	SAVE	1
13. Click	_	
		SELECT DOCUMENTS

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 9.67 – Documents Pane

or Lead Docume	ent		×
	Selected		
→			
→ i			
Drag files here or	BROWSE		
			]
		Selected	Selected

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

Figure 9.68 – 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 . 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 Fees page is displayed.

EFILE QA 01 - EFM QA1 Fees - Draft # 7493	<b>?</b> •	Ø. <del>.</del>
Preload Documents Case Parties Filings Service Fees Summary		
Fest-firms-fees.		
Ad Damum *		
Ad beinnem 🕷 200		
Use Existing Payment Account Create New Payment Account		
Payment Account *		
Firm's New CC 11202020 Credit Card X 👻		
Filing Attorney 🚯 🛊		
Jack Stone x -		
Party Responsible for Fees *		
John Doe \$ SEARCH		
Filer Type		
Default +		
SAVE DRAFT AND EXIT		

Figure 9.69 – 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 filing attorney from the Filing Attorney drop-down list.
- 25. 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.

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

27. Click

The fees for the filing are displayed.

Ξ· 🔆 EFILE QA 01 - EFM QA1 Fees - Draft # 7493 Ο ·	<b>0</b> ∙ ⊕• Ⅲ.	٠
Preload Documents Case Parties Filings Service Fees Summary		
fest-firms-fees.	1 Damages	^
Ad Damnum 🗱		
200	Case Initiation Fee \$10	0.00
Use Existing Payment Account     O Create New Payment Account	Subtotal \$10	0.00
Payment Account *		
Firm's New CC 11202020 Credit Card X 💌	Agreement (w/ Ad Damnum)	^
Filing Attorney 🛈 🛊	Filing Fee \$10	0.50
Jack Stone × *	Subtotal \$10	0.50
Party Responsible for Fees *		
John Doe \$ SEARCH	Service Fees	^
Filer Type	Total Service Fees \$1	31.00
Default +		31.00
	Total Court Service Fees \$1	31.00
	Subtotal \$3	3.00
CALCULATE FEES		
	Grand Total	\$23.50
← SERVICE SAVE DRAFT AND EXIT	5004	MARY ->
	Some	

Figure 9.70 – Example of the Ad Damnum Fees on the Fees Page

SUMMARY

28. Click

to review and complete your filing.

# Entering a Filing with a Motion Type Code

You can enter a filing for a specific motion type.

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

E+ 🤸 EFILE QA 01 - EFM QA1 FI	lings - Draft # 7709 🛛 🔒 🗝				∂- ⊕- Ⅲ- <u>⊝</u>
reload Documents Case	Parties Filings Service Fees	Summary			
ling Code	Client Ref #	Filing Description			Actions
setract Of Judgment					🔺 🗹 🧵
Details Optional Services	Communication				Hide Detail
Test Content filing details Firm. For m	nore information visit: www.google.com				
Filing Type * eFile Only		Filing Code *     Abstract Of Judgme	nt - \$5.00		× -
Filing Description			Client Reference Number		
Comments to Court					
add comment here					
					GO TO OPTIONAL SERVICES
Filmg on behalf of					
Documents*					
Component	Name	Actions	Description	Security	
Lead Document		SELECT DOCUMENTS	This document is required.		
Attachments		SELECT DOCUMENTS			
PARTIES SAVE DRAFT AND EXIT					
		© 2021 Tyler Technologies, Inc.   A	Rights Reserved   Version: 0.0.0.2054		× 100

### Figure 9.71 – Sample 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.

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

# Figure 9.72 – 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.

GO TO OPTIONAL SERVICES

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

Note: Some courts require you to select an optional service. When an optional service is required, you must click the Optional Services tab and select the required service.

The **Optional Services** tab is displayed.

- 🐝 EFILE QA 01 - EFM QA1 Filing	s - Draft # 7709 🔹 -			<b>?</b> -	<b>⊕- Ⅲ-</b> 🧧
eload Documents Case Par	ties Filings Service	Fees Summary			
ng Code	Client Ref #	Filing Description			Action
stract Of Judgment					🔺 🗹 🚺
Details Optional Services	Communication				Hide De
Test content filing details optional service	es firm.				
Not Selected			Selected		
Once Per Party	\$10	<b>→</b>	← Certified Copies *	?? x \$17	
Per Page Fee Service	₩ x	÷	Multiplier *		
Priority Processing	?? x \$17	÷			
Split Fee Service	\$10	÷	Multiplier is Required.		
TOGA Decline Error	\$280	÷			
Garnishment I	?? × \$??	÷			
Garnishment II	\$??	÷			
Per Page Fee No Multiplier		<b>→</b>			
					GO TO COMMUNICATION

Figure 9.73 – 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.

load Documents Case	Parties Filings Service	Fees Summary			
g Code	Client Ref #	Filing Description			Actions
tract Of Judgment					🔺 🗹 🚺
Details Optional Services	Communication				Hide De
est content filing details optional s	ervices firm.				
Not Selected			Selected		
Once Per Party	\$10	÷	← Certified Copies *	1 × \$17 = \$17	
Per Page Fee Service	?? x	÷	Multiplier *		
Priority Processing	?? x \$17	÷	1 0		
Split Fee Service	\$10	÷			
TOGA Decline Error	\$280	÷			
Garnishment I	?? x \$??	<b>→</b>			
Garnishment II	\$??	÷			
Per Page Fee No Multiplier		÷			
				GO	TO COMMUNICATION
iling on behalf of 🚯					

Figure 9.74 – Sample Optional Services Tab with an Optional Service Selected

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

	÷	However, if a apacified antianal convice is required by your court, you must
selec	t that service.	. However, if a specified optional service is required by your court, you must
	GO TO COMMU	NICATION
Click		to specify the recipient of the courtesy or preliminary copies. You must
type a	a valid email ad	dress for the recipient.

ASSOCIATED PARTIES

9.

to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

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

# Figure 9.75 – Associate Parties to this Filing Window

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

12. Select the relationship of the party from the **Party Type** drop-down list.

13. Select the check box for the party to which the associated party should be connected.

14. Click	
15 In the Documents pane click	SELECT DOCUMENTS

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 9.76 – Documents Pane

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

Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ ■			
	Drag files here or	BROWSE		
Naximum Filesize: 50.00 MB				
Supported File Types: TIFF Files (T	IFF TIF) WordPerfect File (WPD	) Word 2007 File (DOCX) W	/ord 97/XP File (DOC) Port	able

Figure 9.77 – Select document(s) for Lead Document Window

Note: If you have already uploaded a lead document, the document is listed in the w	Indow.
16. Click to select the lead document if a document has already been uploaded. Click	BROWSE
to look for a document to upload or to locate additional lead documents.	
Note: If you want to delete a document that you previously uploaded, click	
17. After you have added all of your lead documents, click	
18. If you have attachments to add to the filing, click in the Attachments	section.

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

20. If you want to add another filing, click		peat	the same steps t	for the next filing.
21. After you have added all of the filings, click either	Service >	or	SKIP TO FEES	l.

be leave of a gauge of a leave of a gauge of a leave of	- 🀝 EFILE QA 01 - EFM QA1 Filings - Draft #	7513 ()-				<b>∂- ⊕- Ⅲ-</b>
• Control for for the structure with www.google.com         rest of for getain Firm. For more information with www.google.com         rest of the density	eload Documents Case Parties	Filings Service Fees Summ				
Read Section       Construction       Section       Sect	g Code	Client Ref #	Filing Description			Actic
nd center fine details fine. You reason of a second of	ons					🔺 🗾
time to the term of term o	Details Optional Services Commun	nication				на
Fix and I a     Image: Control	st Content filing details Firm. For more information	on visit: www.google.com				
ten reference in a service in a	ng Type 🕷					
kink lexing a     jangen centered of   Sommer bind   commert bind   Commerts of of the commert bind   Commerts of the commert bind   commerts of of the commert bind   Commerts of the commert bind   commerts of of the commert bind   Commerts of the commert bind   commerts of of the commert bind   Commerts of the commerts of the commert bind   commerts of the commerts of the commert bind   Commerts of the commer			e Motions			×
evente de la construction la c	Ion Type 😈		•			
interesting of an and an	Description			Client Reference Number		
sooment bee sooment of an and a soon of a soo						
an var a 0 SSECURIE PARTIES COLIMENTS ADVOINTS MINIC MONTHS MINIC MO	ments to Court 🚯					
server a Second to Mintes	I comment here					
astranter Conserve Co						
astranter Constant Co						
ASSOCIATE PARTIES						GO TO OPTIONAL SERVICES
ASSOCIATE PARTIES	s on behalf of <b>O</b>					
Name         Actions         Description         Security           and Document         SELECT DOCUMENTS         This document is regarded.         Security           task/ments         SELECT DOCUMENTS         Security         Security	ASSOCIATED PARTIES					
Name         Action         Description         Security           sed Document         SELECT DOCUMENTS         The document is required.         Security           task/ments         SELECT DOCUMENTS         Security         Security						
BELICT DOCUMENTS     The document is required.	ocuments*					
ILLET BOOLMENTS The document is required.	omponent N	łame	Actions	Description	Security	
	ead Document		SELECT DOCUMENTS	This document is required.		
	ttachments		SELECT DOCUMENTS			
TITES SAVE DWAT FAND EXIT						
	ARTIES SAVE DRAFT AND EXIT					

Figure 9.78 – 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		Acti
r w/ special behavior				🔺 🗷
Details Optional Services	s Communication			Hid
st Content filing details Firm. Fo	or more information visit: www.google.com			
ng Type 🕸		Filing Code 🕷		
eFile and Serve		e Waiver w/ spec	ial behavior	×
ng Description			Client Reference Number	
mments to Court 🚯				
ld comment here				
				GO TO OPTIONAL SERVICES
ng on behalf of 🚯				
ASSOCIATED PARTIES				
*				
o ou una o nato T				
ocuments		Actions	Description	Security
Component	Name			
Component	Name		This document is non-ired	
Component	Name	SELECT DOCUMENTS	This document is required.	
Component Lead Document	Name	SELECT DOCUMENTS	This document is required.	
	Name	SELECT DOCUMENTS	This document is required.	
Component Lead Document	Name		This document is required.	
Component Lead Document	Name		This document is required.	
component ead Document	Rame		This document is required.	

Figure 9.79 – 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

Note: Some courts require you to select an optional service. When an optional service is required, you must click the Optional Services tab and select the required service.

The **Optional Services** tab is displayed.

E+ 🤹 EFILE QA 01 - EFM QA1 Fil				Q-	<b>.</b>	• •
eload Documents Case I	Parties Filings Service	Fees Summary				
ing Code	Client Ref #	Filing Description				Actions
istract Of Judgment					4	1
Details Optional Services	Communication					Hide Det
Test content filing details optional ser	vices firm.					
Not Selected			Selected			
Once Per Party	\$10	÷	← Certified Copies *	?? x \$17		
Per Page Fee Service	?? x	÷	Multiplier *			
Priority Processing	?? x \$17	÷				
Split Fee Service	\$10	÷	Multiplier is Required.			
TOGA Decline Error	\$280	÷				
Garnishment I	?? × \$??	÷				
Garnishment II	\$??	÷				
Per Page Fee No Multiplier		÷				
					GO TO COMM	UNICATION

Figure 9.80 – 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.

oad Documents Case	Parties Filings Service	Fees Summary		
Code	Client Ref #	Filing Description		A
act Of Judgment				🔺 🖉
Details Optional Services	Communication			P
est content filing details optional se	ervices firm.			
Not Selected			Selected	
Once Per Party	\$10	÷	← Certified Copies *	1 × \$17 = \$17
Per Page Fee Service	?? x	÷	Multiplier *	
Priority Processing	?? x \$17	÷	1 🗢	
Split Fee Service	\$10	÷		
TOGA Decline Error	\$280	÷		
Garnishment I	?? x \$??	÷		
Garnishment II	\$??	÷		
Per Page Fee No Multiplier		÷		
				GO TO COMMUNICATI

Figure 9.81 – Sample Optional Services Tab with an Optional Service Selected

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

However, if a specified optional service is required by your court, you must select that service.
 GO TO COMMUNICATION
 Click to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

9. Click

to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

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

### Figure 9.82 – 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.

	SAVE	1	
13. Click	_		
			SELECT DOCUMENTS

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 DOCUME	This document is required.	
Attachments		SELECT DOCUME	ENTS	

Figure 9.83 – Documents Pane

elect document(s) f	for Lead Docume	ent		×
Not Selected		Selected		
test.pdf	→ 🗊			
Academic_Calendar	→ I			
	Drag files here or	BROWSE		
i Maximum Filesize: <b>50.00 MB</b>				)
Supported File Types: TIFF Files (TI	FF TIF) WordPerfect File (WPI	0) Word 2007 File (DOCX)	Word 97/XP File (DOC) Portable	
	nt (XML) Windows Media File	(WMV) MPEC (MPEC)		

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

Figure 9.84 – 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 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 - EFIM QA1 Fees - Draft # 7525 € -	
Preload Documents Case Parties Filings Service Fees Summary	$\geq$
Test-firms-fees.	
Claim Amount *	
10000	
Use Existing Payment Account     O Create New Payment Account	
Payment Account *	
New Payment account 0216 QA1 Credit Card	× -
Filing Attorney 🕲 🛊	
Perry Mason	× -
Party Responsible for Fees * John Doe	
Filer Type	
Default	÷
	ATE FEES
← SERVICE SAVE DRAFT AND EXIT	



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

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



#### The fees for the filing are displayed.

E- 🐝 EFILE QA 01 - EFM QA1 Fees - Draft # 7525 0 -	<b>?</b> -	<b>.</b>	•	•
Preload Documents Case Parties Filings Service Fees Summary				
Test-firms-fees. 🟛 Other Civil				^
Claim Amount 🖈				
10000 Case Initiation Fee				\$5.00
Use Existing Payment Account Create New Payment Account			Subtotal	\$5.00
Payment Account *				
New Payment account 0216 QA1 Credit Card × -				^
Filing Attorney 🕲 *				\$10.00
Perry Mason × 👻			Subtotal	\$10.00
Party Responsible for Fees * John Doe • SEARCH   SEARCH				^
Her type Total Service Fees				\$1.00
Default   Convenience Fee				\$1.00
Total Court Service Fees				\$1.00
			Subtotal	\$3.00
			Grand Tota	l \$18.00
SAVE DRAFT AND EXIT			SUI	MMARY ->



28. 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.

Code	Client Ref #	Filing Description			Actio
ment w/ special behavior					1
Details Optional Services	Communication				Hda
at content pro se filing details.					
g Type \star		Filing Code *			
File Only		Statement w	v/ special behavior - \$10.00		×
Ig Description			Client Reference Number		
ments to Court 🚯					
d comment here					
					GO TO OPTIONAL SERVICES
ig on behalf of 🚯					
ASSOCIATED PARTIES					
ocuments*					
		Actions	Description	Security	
iomponent	Name		Deachprint		
omponent		_			
omponent	Name Academic_Calendar_Fall_2019 (1).pdf	1	Description  Academic_Calendar_Fall_2019 (1).pdf	Public (G)	٥
		AUTO-REDACT	Description ()	Public (G)	٥
omponent			Description ()	Public (G)	٩
omponent			Description ()	Public (G)	8
omponent ead Document		AUTO-REDACT	Description ()	Public (G)	•

# Figure 9.87 – 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

Note: Some courts require you to select an optional service. When an optional service is required, you must click the Optional Services tab and select the required service.

The **Optional Services** tab is displayed.

ETILE QA 01 - EFM QA1	Filings - Draft # 7709 i •				<b>.</b>	<b>II</b> - (
eload Documents Case	Parties Filings Service	Fees Summary				
ng Code	Client Ref #	Filing Description				Actions
stract Of Judgment					4	) 🥖 🗂
Details Optional Services	s 🛕 Communication					Hide De
Test content filing details optional	services firm.					
Not Selected			Selected			
Once Per Party	\$10	→	← Certified Copies *	?? x \$17		
Per Page Fee Service	₩ x	→	Multiplier 🖈			
Priority Processing	?? x \$17	÷				
Split Fee Service	\$10	÷	Multiplier is Required.			
TOGA Decline Error	\$280	÷				
Garnishment I	?? x \$??	÷				
Garnishment II	\$??	÷				
Per Page Fee No Multiplier		÷				
					GO TO COM	NUNICATION
Filing on behalf of <b>①</b>					60 10 0000	IUNICATI
ASSOCIATED PARTIES						

Figure 9.88 – 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.

	Parties Filings Service			
Code	Client Ref #	Filing Description		Acti
act Of Judgment				🔺 🗾
Details Optional Services	Communication			Hide
est content filing details optional s	ervices firm.			
Not Selected			Selected	
Once Per Party	\$10	→	← Certified Copies *	1 × \$17 = \$17
Per Page Fee Service	?? x	→	Multiplier *	
Priority Processing	?? x \$17	÷	1	
Split Fee Service	\$10	÷		
TOGA Decline Error	\$280	÷		
Garnishment I	?? x \$??	÷		
Garnishment II	\$??	÷		
Per Page Fee No Multiplier		÷		
				GO TO COMMUNICATION

Figure 9.89 – Sample Optional Services Tab with an Optional Service Selected

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

However, if a specified optional service is required by your court, you must select that service.
 GO TO COMMUNICATION
 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 this Filing					
First Name	Last Name	Entity	Party Type Select	➡ FILTER RESE	τ
Select	Party Name			Party Type	
	Phil Defendant			Defendant	
	Susan Plaintiff			Plaintiff	
Previous 1 Next					2 Result(s) Page 1 of 1
					CANCEL SAVE

### Figure 9.90 – 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.

9. Click

12. Select the check box for the party to which the associated party should be connected.

	SAVE	1	
13. Click	_		
			SELECT DOCUMENTS

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 9.91 – Documents Pane

Select document(s) f	or Lead Docume	ent		×
Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ ■			
	Drag files here or	BROWSE		
Maximum Filesize: <b>50.00 MB</b>				
Supported File Types: TIFF Files (TIF	F TIF) WordPerfect File (WPI	0) Word 2007 File (DO	CX) Word 97/XP File (DOC) Portable	
Document File (PDF) XML Documen	t (XML) Windows Media File	(WMV) MPEG (MPEG)	l.	
			CANCEL SA	AVE

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

Figure 9.92 – 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 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 QA 1 Fees - Draft # 7540 0 -	Ø-	<b>0</b> - <b>•</b> -	<b>⊙</b> - ⊕- <b>Ⅲ</b> -
Preload Documents Case Parties Filings Service Fees Summary			
Test-firms-fees.			
Estate Value *			
200000			
Use Existing Payment Account     O Create New Payment Account			
Ose Existing Payment Account     Oceate New Payment Account			
Feynman Account + Firm's New CC 11202020 Credit Card X +			
Filing Attorney 🚯 * Abby Carmichael × 💌			
Party Responsible for Fees *			
David Defendant			
Filer Type			
Default +			
← SERVICE SAVE DRAFT AND EXIT			su

Figure 9.93 – 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 filing attorney from the Filing Attorney drop-down list.
- 25. 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.

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

27. Click

# The fees for the filing are displayed.

≡- 🎪 EFILE QA 01 - EFM QA 1 Fees - Draft # 7540 💿 -	Q-	⊕- III- <b>●</b> -
Preload Documents Case Parties Filings Service Fees Summary		
Test-firms-fees.	🏦 Other Civil	^
Estata Value * 200000	Case Initiation Fee	\$5.00
Use Existing Payment Account     O Create New Payment Account		Subtotal \$5.00
Peyment Account * Firm's New CC 11202020 Credit Card × +	Statement w/ special behavior	^
Filing Attorney 🕲 *	Filing Fee	\$10.00
Abby Carmichael × +		Subtotal \$10.00
Purly Insponsible for Fres * David Defendant  SEARCH	Service Fees	^
Her Type Default e	Total Service Fees	\$1.00
Default +	Convenience Fee Total Court Service Fees	\$1.00 \$1.00
		Subtotal \$3.00
		Grand Total \$18.00
SAVE DRAFT AND EXIT		SUMMARY ->

Figure 9.94 – Example of the Estate Value Fees on the Fees Page

28. Click

to review and complete your filing.

# **Entering Payment Information**

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

Note: If your firm does not already have a payment account, you can create an account on the Fees page.

=- 🤸 efile qa	A 01 - EFM QA	4 Fees - Draft #	# 4279 ( i) •	,			
Preload Documents	Case	Parties	Filings	Service	Fees	Summary	$\rangle$
Test-firms-fees.							
Use Existing Payme	ent Account	O Create Nev	w Payment Ac	count			
Payment Account *							
Lauren's Waiver	Waiver						× *
Filing Attorney 🚯 \star							
Select							Ŧ
Filing Attorney is Requi	ired.						
Party Responsible for Fees							
Select					÷	SEARCH	
Filer Type Select							\$
						_	
							ULATE FEES
← SERVICE SAVE D	DRAFT AND EX	ат					

Figure 9.95 – Example of a Fees Page

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

- 1. Select one of the payment options:
  - If your firm already has created a payment account, select the **Use Existing Payment Account** option. Then, continue to Step 2.
  - If your firm does 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.
	_	For a credit card or bank account, click . The <i>Enter Information</i> window is displayed. Complete the fields in the <i>Enter Information</i> window for the type of account that you want to create. Then, click <b>Continue</b> and go to step 3.
		Note: For detailed information on how to complete the fields in the <i>Enter</i> <i>Information</i> window, refer to Adding a Credit Card Payment Account, page 39 and Adding an E-Check Payment Account, page 42.
2.	Select the pay	ment account from the Payment Account drop-down list.
2		a other sufficient the Filing Attended dress down list

- 3. Select the filing attorney from the **Filing Attorney** drop-down list.
- 4. Select the party responsible for fees from the Party Responsible for Fees drop-down list. Click

SEARCH

if you want to search for a party.

Select Party Re	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 Nex	t				2 Result(s) Page 1 of 1		
					CANCEL SAVE		

Figure 9.96 – 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.

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

# CALCULATE FEES

6. Click

The fees for the filing are displayed.

reload Documents Case Parties Filings Service Fees Summary		
t-firms-fees. Use Existing Payment Account  Create New Payment Account	Abstract Of Judgment	
New Payment account 0216 QA1 Credit Card × •	Filing Fee	\$5 Subtotal \$5
ing strong 🖲 * Abby Carmichael × 👻	\$ Optional Service Fees	
try thesponsible for Frees * Emma Thomas SEARCH	Certified Copies (\$5.00 x 1)	\$5. Subtotal \$5
er byee Default a	Service Fees	
	Total Service Fees Convenience Fee Total Court Service Fees	\$1. \$1. \$1. Subtotal \$3.
		Grand Total
- SERVICE SAVE DRAFT AND EXIT		SUMMA



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 # 4969 - Case # CC-21-3321 - Judge I	Bender, Bill - James Beardv.Emma Thomas	0-	<b>?</b> -	⊕- Ⅲ-	
Preload Documents Case Parties Filings Service Fee	es Summary				
st-firms-fees.		_			
Use Existing Payment Account Create New Payment Account Payment Account *		Abstract Of Judgment			^
New Payment account 0216 QA1 Credit Card	× *	Filing Fee			\$5.00
ing Attorney 🚯 \star				Subtotal	\$5.00
Abby Carmichael	× *	\$ Optional Service Fees			~
rty Responsible for Fees 🕷					
Emma Thomas	\$ SEARCH	Certified Copies (\$5.00 x 1)		Subtotal	\$5.00
r Type				Subtotal	\$5.00
Select	\$	Mail Service Fees			^
		Total Mail Service Fees			\$6.00
	CALCULATE FEES			Subtotal	\$6.00
		Service Fees			^
		Total Service Fees			\$1.00
		Convenience Fee			\$1.00
		Total Court Service Fees		Subtotal	\$1.00 \$3.00
				Grand Tota	al \$19.
SERVICE SAVE DRAFT AND EXIT				SU	MMARY

Figure 9.98 – Example of a Fees Page with the Mail Service Fees Displayed

7. Review the filing fees, and then click

# Entering Payment Information for Per-Page Optional Service Fee

SUMMARY ->

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 *F*ees 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	→	÷	Per Page Fee Service	0 ×	
Split Fee Service	\$10	→	Multiplier \star			
Certified Copies	?? × \$5	÷	0			
Once Per Party	\$10	<i>→</i>				
Priority Processing	?? x \$5	<b>→</b>				
Placeholder Service 1		<b>→</b>				
Placeholder Service 2 with a long description to trigger horizontal scrolling		÷				
Placeholder Service 3		→				
Placeholder Service 4		÷				
TOGA Decline Error	\$280	→				
Broken Fee	\$10	<b>→</b>				
Per Page Fee No Multiplier		<i>&gt;</i>				
						GO TO COMMUNICATION

Figure 9.99 – Sample Optional Services Tab

d. To select the applicable optional services, click

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

⇒

- e. Continue entering the rest of the required information on the Filings page.
- 5. On the Service page, add the appropriate service contacts.
- 6. On the *Fees* page, select the payment account from the **Payment Account** drop-down list, 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
  - SEARCH

if you want to search for a party.

Select Party Re	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 Nex	t			2 Result(s) Page 1 d	of 1		
				CANCEL SAVE			



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

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

# CALCULATE FEES

9. Click

The fees for the filing are displayed.

≡• 🤹 EFILE QA 01 - EFM QA1 Fees - Draft # 7487 0 •	Q- +- III- 🌞
Preload Documents Case Parties Fillings Service Fees Summary	
Testfirms-fees. Pigmet Acoust * New Pigmet acount 0216 QA1 Credit Card × * Tilling Interview © *	Abstract Of Judgment
Sam Smith × v  Pury Inegonate for Free  Jones Health Clinic   File Type  File Type  Default  c	\$ Optional Service Fees         •           Certified Copies (\$5.00 x 1)         \$5.00           Per Page Fee Service (\$2.50 x 2)         \$5.00           Subtotal \$10.00         \$10.00
	Service Fees     Total Service Fees     Stoo Convenience Fees     Stoo Total Court Service Fees     Subtotal     S3 00
18	Grand Total \$18.00
SAVE DRAFT AND EXIT	SUMMARY →



10. Review the filing fees, and then click

SUMMARY ->

# **Submission Agreements**

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

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

The Submission Agreements pane is displayed on the Summary page.

```
Submission Agreements

I agree that this filing is in compliance with the Rules for E-Filing

You must accept the Submission Agreements.
```

#### Figure 9.102 – Submission Agreements Pane – One Disclaimer

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

Submission Agreements

Figure 9.103 – 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 9.104 – 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 9.105 – 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 9.106 – 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.

E- 🌾 EFILE QA 01 - EFM QA4 Summary-	Draft # 4279 () ~			<b>0</b> - #-	· • • • • • • • • • • • • • • • • • • •
reload Documents Case Parties	Filings Service Fees Summary				
Submission Agreements					
I agree that this filing is in compliance with t	the Rules for E-Filing				
You must accept the Submission Agreements.					Agreements
0				1	Case
Case				*	Parties
OFS QA 2017	Category Family	Type Division	Of Property		Filings
Destina				~ /	Service
Parties				Show All	Fees
					SUBMIT
Filings				1	
Filing Type eFile Only	Filing Code Acknowledgement	Client Ref #	Filing Description		
Component	Document Name	Description	Security		Calculating Fees
Lead Document	Academic_Calendar_Fall_2019 (1).pdf	Academic_Calendar_Fall_2019 (1).pdf	Confidential (G)		
Original					
Service				1	
Count: 0 None					
None					
Fees				1	
Payment Account Lauren's Waiver	Pling Attorney Perry Mason	Party Responsible for Fees George Doe	Piter Type Default		
Laureno waivei	Petry Maaur	devige boe	Derduk		
				Waiver Selected	
FEES SAVE DRAFT AND EXIT				SUBMIT	
					BACK TO TOP

#### Figure 9.107 – Sample Summary Page

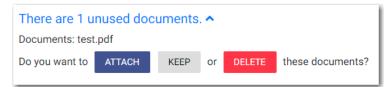
If you selected mail service for your filing, the mail service fees are displayed on the *Summary* page. Note: The Mail Service feature is configured by Tyler and may not be available on your system.

SUMMARY ->

Case				1
Location OFS QA 2017	Category Civil	Type Fraud		
Parties <sub>Court</sub> , 2				Show All
Filings				1
Filing Type eFile and Serve	Filing Code Acknowledgement	Client Ref #	Filing Description	
Component Lead Document Download Vesion Original	occurrent 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
Paymani Account Firm's CC	Filing Attorney Perry Mason	Party Responsible for Fees Mary Doe	Filer Type Default	
1 Fraud				^
Case Initiation Fee				\$10.00 Subtotal \$10.00
Mail Service Fees				^
Total Mail Service Fees				\$6.00 Subtotal \$6.00

Figure 9.108 – 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 9.109 – Unused Documents Message

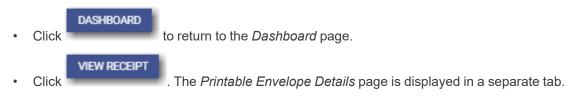
- 3. Click the appropriate button regarding the unused document.
- 4. If there are submission agreements for your filing, select the appropriate check boxes for the submission agreements.
- 5. Review the summary of the case filing. After you are satisfied with the information in your filing, click SUBMIT

The Envelope Submitting window is displayed.

Envelope Submitting		×
Envelope #27878 is submitting.		
	G	
	DASHBOARD VIEW RECEIPT START NEW ENVELOP	E

Figure 9.110 – Envelope Submitting Window

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



ls			@- (	÷- ≣-	
Category		Туро ********			
					Show All
	Filing Description Summons for Amy Doe		Submitted Date 08/05/2021 11:44 AM		
SUMMONS for Amy Doe.pdf	Description		Public (T)		
Client Ref #	Piling Description Case Information		Submitted Date 08/05/2021 11:44 AM		
Civil Domestic Filing Form1.pdf	Description		Security Public (T)		
Client Ref #	Filing Description		Date: 08/05/2021 11:44 AM		
Review Date					
Document.pdf	Description		Security Confidential (G)		
Filing Attorney Abby Carmichael	Party Responsible for Fees Joanne Doe		Filer Type Default		
Transaction Response	Transaction Amount \$0.00		Transaction ID		
					D He Total
	Cuent or a Reason data Busement terms BuseMents BuseMents Civen for a Reason data Civen for a Civen f	Constant a     Resignments       Twee rats     Summons for Amy Doe       Twee rats     anstant       Summons for Amy Doe     anstant       Constant a     Cale Information       Constant a     Cale Information	Numerical     mississeriories Summons for Any Doe Summons for Any Doe Summons for Any Doe pdf       Numerical     mississeriories Casa information       Numerical     mississeriories Casa information	Cuentral     Inspectement     Barrent data       Cuentral     Summond for Anny Doe     Barrent data       Name cue     Summond for Anny Doe     Barrent data       Descentral     Summond for Anny Doe     Padie (T)       Cuentral     Case Information     Barrent data       Descentral     Case Information     Barrent data       Cuentral     Case Information     Barrent	Numerical     Numerical     Numerical       Description     Summonds for Any Doe     B08/57/2021 11.44 AM       Notes class     Boston Any Doe     B08/57/2021 11.44 AM       Description     Description     Boston Any Doe       Description     Description Any Doe    <

Figure 9.111 – 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 Summa	ry - Draft # 4333 🚯 -			<b>0</b> ·⊕-	· · · · · · · · · · · · · · · · · · ·
reload Documents Case Partie	s Filings Service Fees Summary				
Submission Agreements					
I agree that this filing is in compliance w	th the Rules for E-Filing				
Case				1	Agreements
Location	Category	Type			Case
DFS QA 2017	Civil		Of Removal		Parties
Isse Address 555 Main Street					Filings
Dallas, TX 75220 US					Service
Dallas					Fees
Parties				~ /	SUBMIT
Count: 2				Show All	<u>_</u>
Filings				<b>/</b> ci	alculating Fees
Filing Type eFile Only	Filing Code Acknowledgement	Client Ref #	Filing Description		
Component Lead Document	Document Name Academic_Calendar_Fall_2019 (1).pdf	Description Academic_Calendar_Fall_2019 (1).pdf	Confidential (G)		
Download Version	Academic_Calendar_Fail_2019 (1).pdf	Academic_Calendar_Hall_2019 (1).pdf	Confidential (G)		
Original					
Service				1	
Sel VICE				-	
lone					
Fees				1	
ayment Account Jauren's Waiver	Piling Attorney Perry Mason	Party Responsible for Fees John Doe	Filer Type Default		
Jaurens waiver	Petry Mason	John Doe	Derdun		
				Waiver Selected	
FEES SAVE DRAFT AND EXIT				SUBMIT	васк то тор

Figure 9.112 – 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

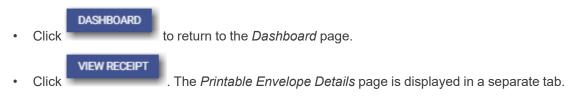


The Envelope Submitting window is displayed.

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

Figure 9.113 – Envelope Submitting Window

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



<ul> <li>• EFILE QA 01 - EFM QA4 Printable Envelope Details</li> </ul>			<b>@</b> · ⊕- <b>≡</b> ·	
Details - Envelope # 27878				
Case				
restion FS QA 2017	Category		Тура	
Parties				Show All
ount 2				DEDW AR
Filings				
Ing Code Vetition (Open Case)	Client Ref #	Filing Description Summons for Amy Doe	Submitted Date 08/05/2021 11:44 AM	
ubmitted	Review Date			
ead Document	SUMMONS for Amy Doe.pdf	Description	Public (T)	
riginal				
ing Code ction - Initial Only	Client Ref #	Filing Description Case Information	Subwrited Data 08/05/2021 11:44 AM	
atus ubmitted	Review Date	Description	Security	
ead Document	Civil Domestic Filing Form1.pdf	Description	Public (T)	
Niginal				
ing Code icknowledgement	Client Ref #	Piling Description	08/05/2021 11:44 AM	
lates iubmitted	Review Date		Security	
ead Document	document.pdf	Description	Confidential (G)	
vriginal				
Service				
unt 0				
Fees	Filing Attorney	Party Responsible for Fees	Filer Type	
auren's Waiver	Abby Carmichael	Joanne Doe	Default	
der ID	Transaction Response	Transaction Amount \$0.00	Transaction ID	D Hel
		21 Tyler Technologies, Inc.   All Rights Reserved   Version: 0.0.0.1937		Total - 50.00

Figure 9.114 – Sample Printable Envelope Details Page

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

	DASHBOARD	1	START NEW ENVELOPE
click either		or	
STAR	T NEW ENVELOPE		
Click		- 1	The <i>Start Filing</i> page is

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

# **View Case Judicial Officer**

You can view the judicial officer who is assigned to a case from several locations in the application.

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

The judicial officer information is available on the following pages:

• Envelope Details page for initial and subsequent filings

0etails - Case # CC-21-493	- Envelope # 158108			PRINT CLOSE
Envelope				
Envelope ID 158108	Submitted by Lauren Groswald		Username @gmail.com	
Case				
Location OFS QA 2014 Judge Bender, Bill	Category Civil		Type Breach Of Contract	
Parties Count: 2				Show All
Filings				
Filing Code Acknowledgement	Client Ref #	Filing Description	Submitted Date 04/25/2021 8:10 AM	
Status Accepted	Review Date 11/01/2021 5:23 PM	Comments		
Component Lead Document	Document Name Book1.pdf	Description	Security Sealed - Criminal (G)	
Download Version Original	Court Copy			
Service				
Count: 0				
None				
Fees				
Payment Account Lauren's Waiver	Filing Attorney Tim Andews	Party Responsible for Fees	Filer Type	
Order ID	Transaction Response	Transaction Amount \$0.00	Transaction ID	
				Total \$0.00

Figure 9.115 – Example of the Judge Information on the Envelope Details Page

• Summary page for subsequent filings

eload Documents Case Parties	Filings Service Fees Summary					
Submission Agreements           This is the first disclaimer.           This is a second disclaimer.						
Case Accellan DFS QA 2014 Marga Bender, Bill	Crategory Civil		Type Breach Of Contract	-	Agreements Case Parties Filings Service	
Parties					ees	
Filings				1		
Plang Type eFile and Serve Composent Lead Document Dominad Version Original	Piting Color Abstract Of Judgment Document Name document pdf	Claure Ref # Description Abstract Of Judgment	Hing Description Security Sealed - Criminal (G)			
				Hide all		
Bobby Smith bobby smith@gmail.com Associated Parties: Fran Kin	Service Method: Eserve					
Fees ayment Account	Filing Attorney	Party Responsible for Face	Fisc Type	1		
auren's Waiver	Abby Carmichael	Fran Klin	Default			
				Total \$0.00 Waiver Selected		
FEES SAVE DRAFT AND EXIT				SUBMIT	BACK TO TOP	Оне

Figure 9.116 – Example of the Judge Information on the Summary Page

• Case page for subsequent filings

😑 🛛 🎪 🛿 🗄 🗛 🕼 🗛 🕼 🗛 🕼 🖓 🗛 🖓 🖓 🖓 🗛 🖉 🖓 🖓 🖓 🗧 🖓 🕮 🖓 🎟 🖓 🏎 🖓 🗄 🖓 🏎 🖉 🗄 🖉 🗧 🖉 🗧 🖉 🖉 🖉	<b>8</b> -	<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				
OFS QA 2014 Civil				
Case Type				
Breach Of Contract				
Judge Bender Bill				
beruet, bii				
← FRELOAD DOCUMENTS SAVE DRAFT AND EXIT			PA	RTIES ->

Figure 9.117 – Example of the Judge Information on the Case Page

• Bookmarks page for subsequent filings

EFILE QA 01 - EFM QA1 Bookmarks				፼- ⊕- Ⅲ.
r				37 Res
Case	ee # 3-21-116 ee Description edrea Thompsonv.ABC Consultants	Location		<u></u>
Case	e l	Location		
cc	-21-117 te Description	OFS QA 2017		
Na	aomi Watson v. Helena Carter			
Cass		Location OFS QA 2017		
FILTER		010 QA 2017		
Care		Location OFS QA 2017		<b>P</b>
	e Description al Brantleyv.Donnelle Vance			
Case		Location		
Case	2-21-1635 re Description ne Doe, MD v.John Smith, SR	OFS QA 2017		
Cass	≻21-3011	OFS QA 2017 - Court at Law 1		
Case	.e∥ }-21-3013	Location OFS QA 2017		
Case	2 - 3013 te Description ne Doe, Illv.John Smith, III	0F5 QA 2017		
Case	>21-3102	Location OFS QA 2017 - Court at Law	Judge Hammond, Don	<u>r</u>
Carr		Location		<u>e</u>
cc	>21-3181	OFS QA 2017		
Case	e i	Location hnologies, Inc.   All Rights Reserved   Version: 0.0.0.2054		

Figure 9.118 – Example of the Judge Information on the Bookmarks Page

# **10** 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.

ESO-FS-220-4496 v.15	

=- 🌾 EFILE QA 01 - EFM QA1 Case Information - Draft # 7562 🕕 -	<b>?</b> -	<b>.</b>	•	•
Preload Documents         Case         Parties         Filings         Service         Fees         Summary         Hearing				
This is test content on case info page for firms.				
Location # Case Citegory #				
OFS MockCMS × - Civil https://www.collincountytx.gov/district_courts/Pages/default.aspx				× *
nicps.//www.com/county/x.gov/uistinc_counts/Pages/veraulcaspx				
Negligence x *				
Procedures / Remedies Damoge 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 parties, subject matter, or factual issues, enter the related case numbers: Related Case				
I hereby certify that the documents in this filing, including attachments and exhibits, satisfy the requirements for redaction 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.				
			_	
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT			P	IRTIES →

Figure 10.1 – 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 🗲

10. Click

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 - Dr.	aft # 16257 🛛 🖬 🕶				<b>8</b> -	<b>.</b> -	<b></b> -	<b>.</b>
Preload Documents Case	Parties Fil	ings Service Fees	Summary					
Party Type	Required Party	Party Name		Lead Attorney				Actions
Plaintiff	This is a required Party	John Doe						Ø
Defendent	This is a required Party							
Personal 🛕 Addr	ess Additional Id	entifiers						Hide Details
Party-Personal-Firm								
Party Type Defendant								
Personal Information								
Person Entity     First Name *		Middle Name		Last Name 🗚		Suffix		
				COM CONTRACTOR OF		Select		\$
First Name is Required.				Last Name is Required.				
Party CMS ID				Service of Process *				
				Select				•
				Service of Process is Required.				
Attorney Information								
ADD/EDIT ATTORNEYS 🎎	]							GO TO ADDRESS
								ADD PARTY
CASE INFORMATION SAVE	DRAFT AND EXIT							FILINGS →
								Ø Help

Figure 10.2 – 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. Complete the **First Name,Middle Name** (if applicable), and **Last Name** fields. Also, if appropriate, select the party's suffix from the **Suffix** drop-down list.
- 3. Type the party case management system ID in the **Party CMS ID** field, if appropriate.
- 4. Select a language from the Interpreter drop-down list, if appropriate.
- 5. 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 10.3 – Example of a Service of Process Drop-Down List

6. Complete other fields on the **Personal** tab, including the attorney information, as applicable.

≡• 🐝 eFile Parties-Dra	ft # 16257 🕕 -					?-	•-	<b></b> -	±
Preload Documents Case	Parties Filings	s > Service > Fees	Summary						
Party Type	Required Party	Party Name			Lead Attorney				Actions
Plaintiff	This is a required Party	John Doe							ø
Defendant	This is a required Party	Doris Defendant							1
Personal Address	Additional Identifiers								Hide Details
Party-Personal-Firm Party-Type Defendant Personal Information Person C Extery									
First Name * Doris		Middle Name		Last Name * Defendant			Select		\$
Party CMS ID				Service of Process *					\$
Attorney Information									GO TO ADDRESS
									ADD PARTY
CASE INFORMATION SAVE	DRAFT AND EXIT								FILINGS 🗲

Figure 10.4 – Example of the Personal Tab on the Parties Page with Fields Completed

7. Click

to enter the address information for the first party.

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

Figure 10.5 – Address Tab on the Parties Page

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

9.	Click	GO TO ADDITIONAL	IDENTIFIERS	to add more information for the specified party.	
Part	у Туре	Required Party	Party Name	Lead Attorney	Actions
Defe	ndant	This is a required Party	John Doe		ø
Plair	ntiff	This is a required Party	Susan Doe		ø
	Personal	Address Additional Identifiers			Hide Details
Thi	is is test content	for Firm-Party-Additional Identifiers.			
	river License Type Select	•	Driver License State	Driver License Number	
s	ocial Security Number	•	Select	•	
	ate of Birth AM/DD/YYYY	8	Gender Select	•	

Figure 10.6 – Additional Identifiers Tab on the Parties Page

- 10. Select the type of driver's license from the Drivers License Type drop-down list.
- 11. Select the state where the driver's license was issued from the Drivers License State drop-down list.
- 12. Type the party's driver's license number in the Drivers License Number field.
- 13. Type the party's Social Security number in the Social Security Number field.

Note: After you type the Social Security number, asterisks are displayed to hide the number.

- 14. Type the party's date of birth in the **Date of Birth** field, or click to select the date from the calendar.
- 15. Select the party's gender from the Gender drop-down list.

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

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

18. If you have another party to add to the case, click have been added to the case.

Continue to add parties until all parties

FILINGS ->

19. Click

to save your work and to continue.

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

My Drafts. Locate the specified draft, and then click

## **Entering Filing Details for Service of Process Cases**

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

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

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 10.7 – Example of an Auto Generated Filings Pane

oad Documents Case Parties	s Filings Service Fees Summary				
( Code	Client Ref #	Filing Description			Act
wiedgment					/
Detells Optional Services 0	Communication				на
ing-Details-Firm					
пд Тури 🕷		Filing Code *			
eFile Only		Acknowledgment			×
ing Description			Client Defension Namber		
rementa lo Court					
					GO TO OPTIONAL SERVIC
					GO TO OPTIONAL SERVICE
ocuments*					GO TO OPTIONAL SERVICE
	Nama	Actions	Description	Security	GO TO OPTIONAL SERVICI
omponent	Name Academic, Sciencisz, 74(J319 (1) per		Description		
omponent		Attors		Security Solind	
omponent			Description		
omponent and Document			Description		
omponent nad Document			Description		
omponent and Document			Description		-
Iomponent and Document Machments			Description		0010 0710044 (BRNO) • •
angunent exact Document mathements	Academic_Dennist/Fel(3119(1).pdf	T BLACT DOCUMENTS	teensten Acknowledgment	Solut.	•
enqueent and thoumant fact-framests Generated Fillings ade	Academic_Colonidat_Pol_2019 (1).pdf	SULCT DOCUMENTS	Activation of the second secon	Belet.	
orgonant kad Document Machmanta	Academic_Dennist/Fel(3119(1).pdf	T BLACT DOCUMENTS	teensten Acknowledgment	Solut.	•

Figure 10.8 – Example of a Filings Page with the Auto Generated Filings Pane Displayed

Note: While you are entering a case filing, click

to view the case number or draft number.

## To enter the filing details:

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

GO TO OPTIONAL SERVICES

Note: Some courts require you to select an optional service. When an optional service is required, you must click the Optional Services tab and select the required service.

The **Optional Services** tab is displayed.

load Documents Case	Parties Filings Service	> Fees > Summary >			
ig Code	Client Ref #	Filing Description			Action
tract Of Judgment					🔺 🗹 🚺
Details Optional Services	Communication				Hide D
Fest content filing details optional s	ervices firm.				
Not Selected			Selected		
Once Per Party	\$10	÷	← Certified Copies *	?? x \$17	
Per Page Fee Service	25 x	÷	Multiplier *		
Priority Processing	?? x \$17	<b>&gt;</b>			
Split Fee Service	\$10	<b>→</b>	Multiplier is Required.		
TOGA Decline Error	\$280	<b>→</b>			
Garnishment I	?? x \$??	<b>→</b>			
Garnishment II	\$??	<b>&gt;</b>			
Per Page Fee No Multiplier		÷			
					GO TO COMMUNICATION
ling on behalf of 🚯					

Figure 10.9 – 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.

⇒

eFILE QA 01 - EFM QA1 F	Parties Filings Service	Fees Summary		
I Code	Client Ref #	Filing Description		Ac
ract Of Judgment				<b>(</b>
Details Optional Services	Communication			н
est content filing details optional se	ervices firm.			
Not Selected			Selected	
Once Per Party	\$10	÷	← Certified Copies *	1 × \$17 = \$17
Per Page Fee Service	?? x	÷	Multiplier *	
Priority Processing	?? x \$17	÷	1	
Split Fee Service	\$10	÷		
TOGA Decline Error	\$280	÷		
Garnishment I	?? x \$??	÷		
Garnishment II	\$??	÷		
Per Page Fee No Multiplier		÷		
				GO TO COMMUNICATIO
-				
ASSOCIATED PARTIES				

Figure 10.10 – Sample Optional Services Tab with an Optional Service Selected

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

However, if a specified optional service is required by your court, you must select that service.
 GO TO COMMUNICATION
 Click to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

9. Click

to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

Associate Parties to th	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 o	f1
							CANCEL SAVE	

### Figure 10.11 – 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.

	SAVE	1
13. Click	_	
		SELECT DOCUMENTS

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 10.12 – Documents Pane

Select document(s) f	or Lead Docume	ent		×
Not Selected		Selected		
test.pdf	→			
Academic_Calendar	→ ■			
	Drag files here or	BROWSE		
i Maximum Filesize: <b>50.00 MB</b>				
Supported File Types: TIFF Files (TI Document File (PDF) XML Documen				ble
			CANCEL	SAVE

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

Figure 10.13 – 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 SAVE .
17. If you have attachments to add to the filing, click in the Attachments section.
18. If you want to add security to any of the documents, select an option from the Security drop-down list.
19. If you want to add another filing, click . Then, repeat the same steps for the next filing.

## **Entering Payment Information**

20. After you have added all of the filings, click either

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

Note: If your firm does not already have a payment account, you can create an account on the Fees page.

≡• 🤸 EFILE Q#	4 01 - EFM QA	4 Fees - Draft #	# 4279 ( 🔹 🕶				
Preload Documents	Case	Parties	Filings	Service	Fees	Summary	$\rangle$
Test-firms-fees.							
Use Existing Payme	ent Account	O Create Nev	w Payment Ac	count			
Payment Account *							
Lauren's Waiver	Waiver						× v
Filing Attorney 🚯 \star							
Select							Ŧ
Filing Attorney is Requi	ired.						
Party Responsible for Fees							
Select					٠	SEARCH	
Filer Type Select							\$
SERVICE SAVE D	DRAFT AND EX	ат					



## To enter the payment information for your filing:

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

CREATE WAIVER

. Then, continue to step 3.

SEARCH

- 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 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 39 and Adding an E-Check Payment Account, page 42.

- 2. Select the payment account from the Payment Account drop-down list.
- 3. Select the filing attorney from the Filing Attorney drop-down list.

if you want to search for a party.

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

	5	•	,		
Select Party	Responsible For Fees	;			
First Name	Last Name	Entity	Party Type Select	<b>♦</b> 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 10.15 – 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.

5. 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 # 4969 - Case # CC-21-3321 - Judge Bender, Bill - James Beardy. Emma Thomas	<b>0</b> -	<b>?</b> -	<b>.</b>	<b></b> -	
Preload Documents Case Parties Filings Service Fees Summary					
est-firms-fees.					
Use Existing Payment Account O Create New Payment Account	Abstract Of Judgment				^
Pegment Account * New Payment account 0216 QA1 Credit Card × ~	Filing Fee				\$5.00
Filing Attorney (1) *				Subtotal	\$5.00
Abby Carmichael × -	\$ Optional Service Fees				^
Party Responsible for Fees *					
Emma Thomas SEARCH	Certified Copies (\$5.00 x 1)			Subtotal	\$5.00 \$5.00
Filer Type					
Default	Service Fees				^
	Total Service Fees				\$1.00
CALCULATE FEES	Convenience Fee Total Court Service Fees				\$1.00 \$1.00
				Subtotal	\$3.00
				Grand Tota	ıl \$13.0
SERVICE SAVE DRAFT AND EXIT				SU	MMARY -

Figure 10.16 – 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.

Preload Documents Case Parties Filings Service Fees Summary		
est-firms-fees.		
Use Existing Payment Account 🔿 Create New Payment Account	Abstract Of Judgment	^
Payment Account *		
New Payment account 0216 QA1 Credit Card	× 👻 Filing Fee	\$5.00
ing Attorney 🚯 *		Subtotal \$5.00
Abby Carmichael	X 🔻	
	\$ Optional Service Fees	^
arty Responsible for Fees *		
Emma Thomas \$ SEARCH	Certified Copies (\$5.00 x 1)	\$5.00
		Subtotal \$5.00
er Type Select	Mail Service Fees	^
	Total Mail Service Fees	\$6.00
	LATE FEES	Subtotal \$6.00
	Service Fees	^
	Total Service Fees	\$1.00
	Convenience Fee Total Court Service Fees	\$1.00 \$1.00
	Total Court Service Fees	\$1.00 Subtotal \$3.00
		3050781 33.00
		Grand Total \$19
SERVICE SAVE DRAFT AND EXIT		SUMMARY





7. Review the filing fees, and then click

## Viewing the Envelope Summary for Service of Process Cases

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

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

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

#### To view the envelope summary:

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

#### The Summary page is displayed.

oad Documents Case Parties	Filings Service Fees Summary				
cation exaition ekalib County - Superior Court	Category Civil		זיזים Amended Limited Partnership	1	
Parties				Show All	Agreements Case Parties
ïlings				1	Filings Service
Filing Type eFile Only component Lead Document Download Visition Original	Pilling Code Acknowledgment Toronament Nam Academic_Calendar,Fall_2019 (1) pdf	Client Ref # Description Acknowledgment	Filing Searcepton Security		Fees Submit
uto Generated Filings					
Filed Type eFile Only Component Lead Document Preview Preview	riting Code Case Initiation Form Document Name Civil Domestic Filing Form2.pdf	Cherr Ref # Dascription	Filing Description Case information sheet Source Superior Court Document		
Filing Type eFile Only Composet Lead Document Preview Preview	Filing Code Verification Document Name SUMMONS for Doris Defendant pdf	Chart Ref # Dascription	Filing Description Summons for Doris Defendant secure 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 10.18 – Sample Summary Page

- 3. If there are submission agreements for your filing, select the appropriate check boxes for the submission agreements.
- 4. Review the summary of the case filing. Also, you can preview the auto generated documents by clicking **Preview** in the Auto Generated Filings pane. After you are satisfied with the information in your filing,

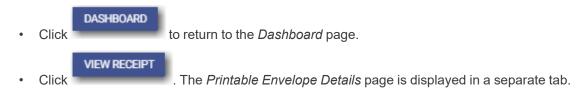


SUMMARY ->

The Envelope Submitting window is displayed.

Figure 10.19 – Envelope Submitting Window

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



<ul> <li>• EFILE QA 01 - EFM QA4 Printable Envelope Details</li> </ul>			<b>@</b> · ⊕- <b>⊞</b> ·	1
Details - Envelope # 27878				
Case				
vestion VFS QA 2017	Category		Туре вилики	
Parties				Show All
ount 2				
Filings				
Ing Code Petition (Open Case)	Chent Ref #	Filing Description Summons for Amy Doe	Submitted Date 08/05/2021 11:44 AM	
lates Wbmitted	Review Date Document Name	Description	Security	
ead Document ownload Version	SUMMONS for Amy Doe.pdf		Public (T)	
ing Code	Client Ref #	Filing Description	Subwritted Date	
action - Initial Only Intes Jubmitted	Review Date	Case Information	08/05/2021 11:44 AM	
ead Document	Decurrent Name Civil Domestic Filing Form1.pdf	Description	Security Public (T)	
ownload Version Driginal				
ing Code icknowledgement	Client Ref #	Piling Description	08/05/2021 11:44 AM	
lates lubmitted	Review Date	Description	Security	
ead Document	document.pdf	Description	Confidential (G)	
Viginal				
Service				
oust 0 Ione				
ees				
yment Account auren's Waiver	Filing Attorney Abby Carmichael	Party Responsible for Fees Joanne Doe	Piter Type Default	
der ID	Transaction Response	Transaction Amount \$0.00	Transaction ID	D Hel
		Tyler Technologies, Inc.   All Rights Reserved   Version: 0.0.0.1937		Total 30.00

Figure 10.20 – 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.

≡ 🔆 eFile Filing History					<b>∂</b> - ⊕- <b>≡</b> -	• maintennyesse.com
Filing History Filter	FILING HISTORY FILING					10 Result(s) Page 1 of 1
Created By	Envelope # 1	65241 1/28/2020 3:49 PM on behalf of Sam Smith by Firm Admin				
My Filings     My Firm	Filing Status	Filma Code	Filing Type	Filing Description	Client Ref #	
Status	Submitted	Appointment	eFile Only	Thing Antica galact		×
All Statuses     Accepted     Cancelled	Envelope # 1 Envelope # 165228 Submitted 0	65228 1/28/2020 10:39 AM on behalf of Sam Smith by Firm Admin				
O Receipted O Served O Returned	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8
O Submitted O Submitting	Case # 1234	1/28/2020 8:47 AM on behalf of Sam Smith by Firm Admin				🖻 🖪 🗄
Any Location	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Case Number / Envelope Number	Envelope # 1	Action - Subsequent Only	eFile and Serve			
Case Number		1/28/2020 8:29 AM on behalf of Sam Smith by Firm Admin				
Envelope Number	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Date Range	SubmissionFailed	Appendix	eFile Only			
Anytime     Last Month     Last Week	Case # CC-19 Envelope # 165222 Submitted 0	9-3477 1/28/2020 8:23 AM on behalf of Sam Smith by Firm Admin				
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8
From Date	Envelope # 1	65221				
To Date	Envelope # 165221 Submitted 0	1/28/2020 8:17 AM on behalf of Sam Smith by Firm Admin				
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #	

Figure 10.21 – Filing History Page

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

The envelope details are displayed.

etails - Envelope # 26465				PRINT CLOS
Case				
oparion DFS QA 2017	Critegory Civil		Type Breach Of Contract	
Demege Amount	Cen		breach of contract	
Under \$1000				
Parties				Show All
-0011. Z				
Filings				
FilingCode	Cluet Ind #	Filing Description	Subsectional Control	
Action - Initial Only Status	Shariwy Date	Case Information	07/20/2021 5:44 PM	
Submitted Component	Doournerd Name			
Lead Document	Civil Domestic Filing Form.pdf	Description	facurity Public (T)	
Download Venion Original				
Filing Code	Client Ind #	Filing Description	Submitted Date	
Acknowledgement		Paing Unicopical	07/20/2021 5:44 PM	
Status Submitted	Review Date			
Component	Document Name	Description	Security	
Lead Document Download Vesion	redactthis.pdf		Confidential (G)	
Original				
Filing Code	Ciset Inf #	Filing Description	Subrrited Data	
Petition (Open Case)	Sharinov Date	Summons for Jane Doe	07/20/2021 5:44 PM	
Submitted				
Component Lead Document	Document Name SUMMONS for Jane Doe.pdf	Description	Security Public (T)	
Download Vestion Original				
Service				
Court 0 None				
Fees				
Wmart Account	Filing Attorney	Party Hesperrollie for Fees	Filer Type	
Lauren's Waiver	Abby Carmichael	Jane Doe	Default	
Order 1D	Intransform Interpreter	Transaction Amount \$0.00	Transaction ID	
				Total \$0.0
				Waiver Selecte
				CLOS

## Figure 10.22 – Sample Envelope Details Page

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

## **11** 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.

Depending on your configuration, a transactional redaction fee may be applied to each document in your envelope. If a fee is applied, the amount is displayed on the *Filings* page, the *Fees* page, the *Summary* page, and in the envelope details.

The following data is automatically redacted from documents:

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

## Entering a Filing with Redacted Documents

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

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

Note: Your court may charge a transactional redaction fee for each document that you redact.

To enter a filing with redacted documents:

START FILING

1. On the Dashboard page, click

The Start Filing page is displayed.

EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	<b></b> -	2 manual and -
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Locator * Select				
Location is Required.				
← DASHBOARD				
L <sub>2</sub>				
				Ø Help

Figure 11.1 – Start Filing Page

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

The New Case and the Existing Case panes are displayed.

= 🎪 EFILE QA 01 Start Filing	<b>⊙</b> - ⊕- <u></u> . <b>≜</b> -
Select Filing Location	
Select your filing location to see which types of filings are allowed at that location.	
Loston # 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	
μť	
	Q Help

Figure 11.2 – Start Filing Page with Case Panes Displayed

3. Click

START A NEW CASE

The Preload Documents page is displayed.

=- 🀝 EFILE QA	01 - EFM QA4 Preload Do	ocuments - Draft # 4	4279 i -								<b>8</b> -	<b>.</b>	<b></b> -	A 1999 1 1999 1 1999
Preload Documents	Case Parties	Filings	Service	Fees	Summary	$\rangle$								
					🛆 Dray	files here or	BROWSE							
Maximum Filesize: 50.00 MB Supported File Types: MPEG (I	MPEG) Portable Document File	e (PDF) TIFF Files (TIFF	TIF) Windows M	ledia File (WM	V) Word 2007 File (D	CX) Word 97/X	P File (DOC) WordF	Perfect File (WPI	D) XML Document	(XML) .				
SAVE DRAFT AND EXIT														CASE INFORMATION ->

Figure 11.3 – 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.

🚍 - 🤹 EFLE QA 01 - EFM QA1 - Preload Documents - Draft # 7646 🛛 🕕	8.	<b>.</b> -	<b></b> .	•
Preload Documents Case Parties Filings Service Fees Summary				
Case     Parties     Filings     Service     Fees     Surmary         AUTO-REDACT     Image: Case     Drag files here or     BROWSE   50:00 MB ex. MPG0 (MPE0) Portable Document File (PSP) TIFF Files (TIFF TIF) Windows Media File (MMr) Word 2007 File (DOCQ) Word 97/AP File (DOC) PILe (DOC)				
Drag files here or BROWSE				
Maximum Fielder 50.00 MB Supported File Types: MPED (MPED) Portable Document File (PDF) THF Files (THF THF) Windows Media File (WMV) Word 2007 File (DOC) Word 97/XP File (DOC) WordPerfect File (WPD) XML Document (XML).				
SAVE DRAFT AND DXT		C	ASE INFORM	





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
$\checkmark$	redactthis.pdf. Number of items
	redacted: 8

## Figure 11.5 – Example of a Message for a Completed Redaction

CASE INFORMATION ->

7. Click

to continue with your filing.

The Case Information page is displayed.

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

The Parties page is displayed.

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

The Filings page is displayed.



FILINGS 🗲

	Of and Def #				
ode	Client Ref #	Filing Description			Ac
t Of Judgment					🔺 💌
etails Optional Servi	ices 🛕 Communication				м
Content filing details Firm.	. For more information visit: www.google.com				
Type 🗶		Filing Code *			
File Only		Abstract Of	f Judgment - \$5.00		×
Description			Client Reference Number		
ients to Court 🟮					
comment here					
					GO TO OPTIONAL SERVICE
on behalf of 🚯					
SSOCIATED PARTIES					
ocuments*					
	will result in a fee of \$5.00 for each redacted document.				
Auto-Redaction at this location				Security	
uto-Redaction at this location	Name	Actions	Description	Security	
uto-Redaction at this location		Actions SELECT DOCUMENTS		Security	
			Description This document is required.	Security	
uto-Redaction at this location				secury	

Figure 11.6 – Sample Filings Page with the Redaction Fee Displayed

10. Complete the required fields on the <i>Filings</i> page, and then click	SERVICE →
The <i>Service</i> page is displayed.	_

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

The Fees page is displayed.

Service 🗲	
-----------	--

FEES

Er 🌾 EFILE QA 01 - EFM QA1 Fees - Draft # 7772. 0 -				<b>0</b>	<b>.</b>	
ise Parties Filings Service Fees Su	ummary					
-firms-fees.			_			
Use Existing Payment Account Create New Payment Account			Abstract Of Judgment			^
Firm's New CC 11202020 Credit Card		× -	Filing Fee			\$5.00
ng Attorney 🚯 🗶					Subtotal	\$5.00
Abby Carmichael		× •	\$ Optional Service Fees			~
rty Responsible for Fees 🗰			Optional control + coo			
John Doe	•	SEARCH	Certified Copies (\$17.00 x 2)			\$34.00
			Split Fee Service (\$10.00 x 1)		Subtotal	\$10.00
⊭ Type Default		•			subtotal &	\$44.00
		-	♣ Redaction Fees			^
	CALCU	LATE FEES	Redaction Fee (\$5.00 x 1)		Subtotal	\$5.00
					Subtotal	\$5.00
			Service Fees			^
			Total Service Fees			\$1.00
			Convenience Fee			\$2.00
					Subtotal	\$3.00
				G	Grand Total	I \$53
SERVICE SAVE DRAFT AND EXIT					1	Qн

Figure 11.7 – Sample Fees Page with the Redaction Fees Displayed

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

The *Summary* page is displayed.

SUMMARY 🗲

Parties Filings Service Fees	bommery				
Ibmission Agreements agree that this filing is in compliance with the Rules for E-Fil	ing				
ISE				Agreement	
QA 2018 - Court at Law	Category Family		Type Other Family Law Matters	Case	
rties				Bion Al Service	
ngs				Fees	
a have lee Only sourcest dd Occurreent	Filing Code Adottract Of Judgment Dusant New document and	Chert Ind. # Dewritten Abstract Of Judgmeent	Fileg Descriptor		
ad Document niad Venian redacted	document pdf Actains EDIT REGACTIONS	Abstract Of Judgment			
vice				1	
25				1	
(Account) ; New CC 11202020	Hing Allomy Abby Carmichael	Party Reparable for Fires John Doe	File Type Default		
Abstract Of Judgment				<b>~</b>	
ng Fee				\$5.00 Subtotal \$5.00	
Optional Service Fees				^	
rtified Copies (\$17.00 x 2) Iit Fee Service (\$10.00 x 1)				\$34.00 \$10.00 Subtetal \$44.00	
<ul> <li>Redaction Fees</li> </ul>				^	
daction Fee (\$5.00 x 1)				\$5.00 Subtotal \$5.00	
Service Fees				^	
tal Service Fees nvenience Fee				\$1.00 \$2.00	

Figure 11.8 – Sample Summary Page with the Redaction Fees Displayed

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.

Some documents are still redacting. Be advised this may affect fee calculation once they are complete. You may check their status on the Filings and Summary screens.

## Figure 11.9 – Example of a Message with Redaction in Progress

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



to save your changes and close the viewer.

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

SUBMIT

submission agreements (if applicable), click

EDIT REDACTIONS

• 🌾 DTRE GA 01 - DTM GA1 Printable Envelope Details				<b>⊕</b> ∙ ⊕∙ <b>⊞</b> •
etails - Envelope # 169524				
nvelope				
niga 12 9524	n L	denteller auren Grossvald	Ggmail.com	
ase				
ston S QA 2018 - Court at Law	o F	anity	Tew Other Family Law Matters	
arties				Store
ilings				
rgCode isstract Of Judgment ne	Client Fluf #	Filing Description	Salversted Oate 11/09/2021 4	:00 PM
bmitting reveal ad Document wild twee iginal	Document Name document pdf	Countryline	Security	
ervice				
ne				
ees				
mel Accuré mis New CC 11202020 v no ymentTransactionDetail	Here Atomiy Abby Carmichael Inexection Response	Party Insponded for Seas John Doe Transation Annual \$57.00	rier type Default Isseedon 12 139377	
Abstract Of Judgment				^
Filing Fee				55.00 Subtotal \$5.00
\$ Optional Service Fees				^
Optional Service Fee Optional Service Fee Optional Service Fee				510.00 517.00 544.00 <b>544</b> .00
20 Redaction Fees				^
Total Redaction Fees				\$5.00 Subtotal \$5.00
Service Fees				^
Convenience Fee Total Filing & Service Fees				D
		© 2021 Tyler Technologies, Inc. (All Rights Reserved   Version: (	0.0.2044	×=

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

Figure 11.10 – Sample Envelope Details Page with the Redaction Fees Displayed

## **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 11.11 – 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 11.12 – 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.
( <del>)</del>	Click this icon to zoom in to a particular place in the document.
0	Click this icon to zoom out.
EQ.	Click this icon to rubberband (that is, draw a border around) an area of the document in which you want to zoom.
9	Click this icon to magnify an area of the document.
*	Click this icon to fit the document to the window.
1	Click this icon to fit the document to the height of the window.

Icon	Description
•••	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.
	Click this icon to view the last page of the document.
(	Click this icon to rotate the document to the right.
)	Click this icon to rotate the document to the left.
C <sup>1</sup>	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. <b>Note: Click the icon again to close the thumbnail pane.</b>

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

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	Longs V	
	A CONTRACTOR OF A CONTRACTOR OF A CONTRACTOR OF A CONTRACTOR A CONTRAC	
	and an and the second	

## Figure 11.13 – 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.
Y	Click this icon in the thumbnail pane to view only the pages that have a redaction on them.

# **12** 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 Filing History					0- ⊕- ≣-	
Filing History Filter	FILING HISTORY FILING					10 Result(s) Page 1 of 1
Created By	Envelope # 1					
My Filings     My Firm	Envelope # 165241 Submitted 01	1/28/2020 3:49 PM on behalf of Sam Smith by Firm Admin Filing Code	Filing Type	Filing Description	Client Ref #	
Status	Submitted	Appointment	eFile Only			8
All Statuses     Accepted     Cancelled	Envelope # 1 Envelope # 165228 Submitted 01	65228 1/28/2020 10:39 AM on behalf of Sam Smith by Firm Admin				
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filling Description	Client Ref #	8
O Submitting	Case # 1234	1/28/2020 8:47 AM on behalf of Sam Smith by Firm Admin				🖻 🖹 🗄
Location		,				
Any Location	Filing Status     Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #	
Case Number / Envelope Number	Envelope # 1					B 🖾 🗄
Case Number		1/28/2020 8:29 AM on behalf of Sam Smith by Firm Admin				
Envelope Number	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Date Range	SubmissionFailed	Appendix	eFile Only	Filing Description	Calent Her #	
Anytime     Last Month     Last Week	Case # CC-19 Envelope # 165222 Submitted 01	9-3477 1/28/2020 8:23 AM on behalf of Sam Smith by Firm Admin				
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filling Description	Client Ref #	8
From Date	Envelope # 1	65221				
To Date		Enviced 11/52/15 Bernind 01/52/2020 ET AM on behalf of Sam Smith by Fam Amm				
RESET FILTER	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #	

Figure 12.1 – Filing History Page

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

CASE INFORMATION ->

to enter case information, or click SKIP TO FILINGS  $\rightarrow$ 

ADD PARTY

if you want to

go directly to the *Filings* page.

2. Click

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

## If your system is configured with this capability

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

GO TO OPTIONAL SERVICES

is displayed on the Parties page.

Note: Some courts require you to select an optional service. When an optional service is required, you must click the Optional Services tab and select the required service.

## The Optional Services tab is displayed.

9. To select the applicable optional services, click

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

÷

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

. However, if a specified optional service is required by your court, you must select that service.

GO TO COMMUNICATION

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

ASSOCIATED PARTIES

11. Click to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

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

Figure 12.2 – Associate Parties to this Filing Window

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

13. Select the relationship of the party from the **Party Type** drop-down list.

14. Select the check box for the party to which the associated party should be connected.

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



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 12.4 – Select document(s) for Lead Document Window
17. Click to look for a document to upload. Then, click to select the lead document.
Note: If you want to delete a document that you have uploaded, click
18. After you have added all of your lead documents, click
19. If you have attachments to add to the filing, click select documents in the <b>Attachments</b> 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 . SKIP TO FEES .
23. On the <i>Service</i> page, add service contacts if applicable. Then, click FEES →
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 filing attorney from the Filing Attorney drop-down list.
26. Select the party responsible for fees from the <b>Party Responsible for Fees</b> drop-down list.
Note: If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.
27. Select the filer type from the Filer Type drop-down list.
28. Click if you want to view the fee total.
SUMMARY → 29. Click

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

SUBMIT

31. When you are satisfied with your filing, click

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

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

1. On the Dashboard menu, click Case Search.

The File into Existing Case window is displayed.

ile into Existing Case	
Location *	
Select	÷
Location is Required.	
Search for a Case by Case Number Party Name	Q
Case number format is default.	· ·
Case Number \star	
Case Number is Required.	
	CANCEL SEARCH

Figure 12.5 – 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 12.6 – 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-	
Location: OFS QA 2014 - Court at Law Case N	lumber: 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.

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

GO TO OPTIONAL SERVICES								
10. If you need to apply any optional services for the filing, click								
Note: Some courts require you to select an optional service. When an optional service is required, you must click the Optional Services tab and select the required service.								
The <b>Optional Services</b> tab is displayed.								
11. To select the applicable optional services, click $\rightarrow$ .								
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 . However, if a specified optional service is required by your court, you mus select that service.								
12. Click to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.								
ASSOCIATED PARTIES								

13. Click to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

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



- 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.



18. In the Doo	cuments pane, click	SELECT DOCUMENTS		
Documents*				
Component	Name	Actions	Description	Security
Lead Document		SELECT DOCUMENTS	This document is required.	
Attachments		SELECT DOCUMENTS		

Figure 12.9 – Documents Pane

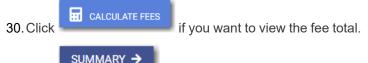
Select document(s) for Lead Document
Not Selected     Selected       test.pdf     →       Academic_Calendar     →
Drag files here or     BROWSE
Maximum Filesize: 50.00 MB Supported File Types: TIFF Files (TIFF TIF) WordPerfect File (WPD) Word 2007 File (DOCX) Word 97/XP File (DOC) Portable Document File (PDF) XML Document (XML) Windows Media File (WMV) MPEG (MPEG) .
CANCEL SAVE
Figure 12.10 – Select document(s) for Lead Document Window
19. Click to look for a document to upload. Then, click to select the lead document.
Note: If you want to delete a document that you have uploaded, click
20. After you have added all of your lead documents, click
21. If you have attachments to add to the filing, click in the <b>Attachments</b> section.
22. If you want to add security to any of the documents, select an option from the <b>Security</b> drop-down list.
23. If you want to add another filing, click . Then, repeat the same steps for the next filing.
24. After you have added all of the filings, click either or SKIP TO FEES .
25. On the Service page, add service contacts if applicable. Then, click

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

- 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 filing attorney from the Filing Attorney drop-down list.
- 28. Select the party responsible for fees from the Party Responsible for Fees drop-down list.

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

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



- 31. Click
- 32. Review the summary. If applicable, select the Submission Agreements check box.
- 33. When you are satisfied with your filing, click

## Filing into an Existing Case from the Dashboard Page

SUBMIT

To file into an existing case from the Dashboard page:

From the Case Search pane, click Case Search at the top of the pane, or click Search Cases 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.

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

Figure 12.11 – 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	د
Select	÷
Location is Required.	
Case number format is default.	
Case Number 🖈	
Case Number is Required.	
	CANCEL SEARCH

Figure 12.12 – File into Existing Case Window—Excludes Party Name Option

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

or press ENTER.

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

SEARCH

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

	REFINE SEAR

#### Figure 12.13 – Case Search Page

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.

		CASE INFORMATION $\rightarrow$	to a transmission for the second states of the	SKIP TO FILINGS → →
4.	Click go dir	ectly to the <i>Filings</i> page.	to enter case information, or click	if you want to
			ectly to the <i>Filings</i> page, the case . The ability to add a new party to	and party information from the an existing case is configurable.
	lf you	r system is configured	with this capability,	is displayed on the <i>Parties</i> page.
5.	On the	e <i>Filings</i> page, select the	filing type from the <b>Filing Type</b> dro	o-down list.
6.	Selec	t the filing code from the <b>I</b>	Filing Code drop-down list.	
7.	Туре а	a description in the <b>Filing</b>	Description field.	
8.	Туре а	a client reference number	in the Client Reference Number f	ield.
9.	lf you	have any comments for t	he court regarding the filing, type th	em in the <b>Comments to Court</b> field.
10	. lf you	need to apply any option	al services for the filing, click	0 OPTIONAL SERVICES
			ou to select an optional service. V Optional Services tab and select	
	The <b>C</b>	ptional Services tab is o	lisplayed.	
11.	. To sel	ect the applicable option	→ al services, click	
		optional services require ultiplier will calculate the		es that you need. For those services,
	Note:	<del>(</del>		rvice that you have selected, click s required by your court, you must
	selec	t that service.	.,	
12	. Click type a	GO TO COMMUNICATION valid email address for t		tesy or preliminary copies. You must

ASSOCIATED PARTIES

13. Click

to associate parties with the filing.

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

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

#### Figure 12.14 – 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	SELECT DOCUMENTS		
Documents*			
Component Name	Actions	Description	Security
Lead Document	SELECT DOCUMENTS	This document is required.	
Attachments	SELECT DOCUMENTS		

Figure 12.15 – 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 12.16 – Select document(s) for Lead Document Window
19. Click to look for a document to upload. Then, click to select the lead document.
Note: If you want to delete a document that you have uploaded, click
SAVE
20. After you have added all of your lead documents, click
21. If you have attachments to add to the filing, click in the <b>Attachments</b> section.
22. If you want to add security to any of the documents, select an option from the <b>Security</b> drop-down list.
23. If you want to add another filing, click . Then, repeat the same steps for the next filing.
24. After you have added all of the filings, click either SERVICE → or SKIP TO FEES
25. On the Service page, add service contacts if applicable. Then, click
26. 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.
27. Select the filing attorney from the <b>Filing Attorney</b> drop-down list.
28. Select the party responsible for fees from the <b>Party Responsible for Fees</b> drop-down list.
Note: If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.
29. Select the filer type from the Filer Type drop-down list.
30. Click if you want to view the fee total.
31. Click SUMMARY →

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

SUBMIT

33. When you are satisfied with your filing, click

## Filing into a Non-Indexed Case

You can file into a case that does not exist in the case management system. To file into a non-indexed case:

1. On the Dashboard menu, click Case Search.

The File into Existing Case window is displayed.

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

Figure 12.17 – 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.

ile into Existing Case	
Location *	
Select +	
Location is Required.	
Case number format is default.	<b>U</b>
Case Number 🖈	
Case Number is Required.	

Figure 12.18 – File into Existing Case Window—Excludes Party Name Option

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

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

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

SEARCH

4. Click or press ENTER.

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

😑 🐝 eFile Case Search	<b>?</b> -	•-	<b></b> -	A momentation quarks the
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 effice into a case that has yet to receive an electronic submission and the case is not searchable from the court's case management sys required to manually input the case information. Any additional filings on this case will not require the manual data entry.	tem. You a	re still able	to file into	this case, but you will first be
			I DO	N'T SEE MY CASE REFINE SEARCH

Figure 12.19 – Case Search Window with No Results Found

5. To continue, click

I DON'T SEE MY CASE

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

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

≡• 🤹 FFILE QA 01 - EFM QA1 Case Information - Draft # 7587 - Case # CC-145333 0 •	<b>?</b> -	••	<b></b> -	•
Preload Documents Case Parties Filings Service Fees Summary				
Case Number 🗰				
CC-145333				
Location * Case Category *				
OFS Non-Integrated x v Select				*
Case Category is Required.				
Case Type 🕷				
Select 👻				
Case Type is Required.				
← PRELOAD DOCUMENTS SAVE DRAFT AND EXIT			PA	ARTIES 🗲

#### Figure 12.21 – 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.

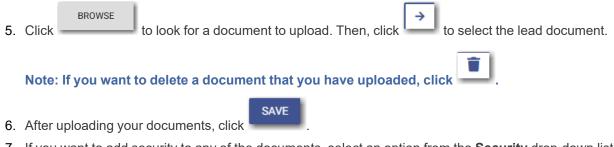
4. In the Doo	cuments pane, c	SELECT DOCUMENTS		
Documents*				
Component	Name	Actions	Description	Security
Lead Document		SELECT DOCUMENTS	This document is required.	
Attachments		SELECT DOCUMENTS		

#### Figure 12.22 – Documents Pane

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

lot Selected		Selected		
test.pdf	→			
Academic_Calendar	→ <b>Î</b>			
	Drag files here or	BROWSE		
1aximum Filesize: <b>50.00 MB</b>				
upported File Types: TIFF Files	(TIFF TIF) WordPerfect File (WP	D) Word 2007 File (DO	X) Word 97/XP File (DOC)	Portable

Figure 12.23 – Select Document(s) for Lead Document Window



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



8. Click

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

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

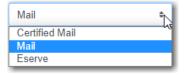
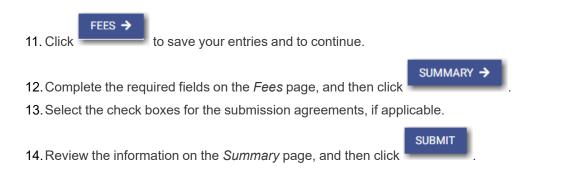


Figure 12.24 – Sample Service Method Drop-Down List

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.

reload Documents	Case Parties Filings Service	Fees Summ	nary			
Service Contact						
Service Contacts:						
FROM MY FIRM	ADD NEW C	ONTACT				
arties		Service C	ontacts Serve all			~
pe: laintiff	Name: Edmund Chanelle	Serve	Service Method	Name	Email/Mail	Show
Serve all party contacts		Click to e	xpand			
<sup>pe:</sup> efendant	Name: Simone Haydn	Serve	Service Method	Name	Email/Mail	Coun
		No servic	e contacts			
pe: A	Name: Other Service Contacts	Serve	Service Method	Name	Email/Mail	Court
Serve all 'other' contacts		$\checkmark$	Eserve	Bobby Smith	bobby.smith@gmail.com	1





# **13** Access re:Search®

While you are working in the Odyssey File & Serve system, you can access re:Search<sup>®</sup> from several locations in the system.

## Note: This feature is configured by Tyler and may not be available on your system. You also must have an existing account in re:Search to access it from the Odyssey File & Serve system.

A case that is available in re:Search is indicated by an icon ( ). Click to access a specified case in re:Search opens in a new tab in your browser, and the specified case details are displayed. You can view past and future hearing dates for the case, if it is available in re:Search.

You can access re:Search from the following locations in the Odyssey File & Serve system:

- =- 🌜 EFILE QA 01 EFM QA1 Filing History 2-**.**--FILING HISTORY FILING DRAFTS Filing History Filter 13 Result(s) Page 1 of 1 Created By Case # CC-21-1278 👚 🗈 🔍 : My Filings Envelope # 169524 Submitted 11/09/2021 4:00 PM on behalf of Abby Carmichael by Lauren Groswald O My Firm Status Reviewed Abstract Of Judgment eFile Only All Statuses Accepted Case # CC-21-493 👚 🗈 🔍 : O Cancelled O Receipted Fran Klinv.Henderson and Associates O Served Envelope # 169050 Submitted 11/03/2021 10:31 AM on behalf of Abby Carmichael by Lauren Groswald O Returned O Submitted Submitting Filing De Abstract Of Judgment × Submitted eFile and Serve Location Any Location ÷ Envelope # 168796 Case / Envelope Number Envelope # 168796 Submitted 11/01/2021 5:15 PM on behalf of Jack Stone by Lauren Groswald Case Number Filing Code Client Ref # Filing Status Eiling Type Filing Descript X Envelope Number Submitted Abstract Of Judgment eFile Only Date Range Case # CV-2021-019900 🖻 🗈 🔍 : Anytime C Last Month Henry Doe vs Maria Jones O Last Week Envelope # 168773 Submitted 11/01/2021 3:53 PM on behalf of Jack Stone by Lauren Groswald O Last Two Davs Filing Code Client Ref # O Pick a Custom Range Accepted Abstract Of Judgment eFile Only Q Help RESET FILTER
- Filing History page

Figure 13.1 – re:Search Icon on the Filing History Page

• Filing Drafts page

=- 🀝 EFILE QA 01 - EFM (	A1 Filing Drafts				9-	<b>.</b>	<b></b>	<b>•</b>
Filing Drafts Filter	FILING HISTORY	FILING DRAFTS					63 Result(s	b) Page 1 of 4
Created By	Draft # 77	15						
<ul> <li>My Filings</li> <li>My Firm</li> </ul>	Draft # 7715 Started 11/	03/2021 5:36 PM by Lauren Groswald						
Location	Draft # 77	10					•	:
Any Location +	Draft # 7710 Started 11/	03/2021 12:09 PM by Lauren Groswald						
Case / Draft Number	Filing Status Draft	Filing Code Abstract Of Judgment	Filing Type Efile	Filing Description Abstract Of Judgment		Client Ref I		
Draft Number Date Range	Draft # 77	09 03/2021 12:04 PM on behalf of Jack Stone by Lauren Grosw	əld			[	Þ Î	:
Anytime Last Month Last Week Last Week	Filing Status Draft	Filing Code Abstract Of Judgment	Filing Type Efile	Filing Description Abstract Of Judgment		Client Ref #		
Last Two Days     Today     Pick a Custom Range     From Date	Case # CC (Hammond, Don) Draft # 7707 Started 11/	C-21-3102					۹ 🕯	:
To Date	Draft # 77	03 02/2021 9:26 AM by Lauren Groswald				[	•	:
	Filing Status Draft	Filing Code	Filing Type Efile	Filing Description		Client Ref #		
	Draft # 77	02				[		O Help

Figure 13.2 – re:Search Icon on the Filing Drafts Page

• Case Search page

🚍 - 🐝 EFILE QA 01 - EFM QA1 Case Search			<b>?</b> - ⊕-	<b></b> -	<u>•</u> •
Location: OFS QA 2017 Case Number: CC-21-3102					
Case #CC-21-3102				<b>E C</b>	:
OFS QA 2017 - Court at Law	Case Category Civil	Case Type City Ordinance Cases			
Previous 1 Next				1 Result(s)	Page 1 of 1
← DASHBOARD				REFINE	SEARCH

Figure 13.3 – re:Search Icon on the Case Search Page

• Bookmarks page

=- 🐝 EFILE QA 01 - EFM QA1 Bookmarks			6	)- ()	- 11-	• ••
Bookmark Filter	1				6 Res	ult(s) Page 1 of 1
Case Location	Case # CC-20-1475 Case Description Julia Reedy Sam Muir	Location OFS QA 2017		Ľ		<b>Ç</b> :
Case Number						
Case Number	Case # CC-21-2477	Location		Ľ		<b>Ç</b> :
Case Description Case Description	Case # CC-21-2479	Location OFS QA 2017		ŕ		<b>Ç</b> :
RESET	Case # CC-21-2499 Case Description Henry Ford vs Jane Doe	Location OFS QA 2017		ŕ		<b>Ç</b> :
	Case # CC-21-493 Case Description Fran Klinv.Henderson and Associates	Location OFS QA 2014		ŕ		<b>Ç</b> :
	Case # CV-2021-019900 Case Description Henry Doe vs Maria Jones	Location OFS MockCMS		ŕ		<b>Ç</b> :
	Previous 1 Next				6 Res	ult(s) Page 1 of 1
		[₂				() Help

Figure 13.4 – re:Search Icon on the Bookmarks Page



#### Topics covered in this chapter

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

You can view the service contact history for a case from any of the following locations:

= 🐝 eFile Filing History					0. ⊕. ∭.	≜ maintennigense me
Filing History Filter	FILING HISTORY FILING DRAFTS	N				10 Result(s) Page 1 of 1
Created By	Envelope # 16524	1 49 PM on behalf of Sam Smith by Firm Admin				
My Filings     My Firm	Filing Status	Hing Code	Filing Type	Filing Description	Client Ref #	
Status	Submitted	Appointment	eFile Only			
All Statuses     Accepted     Cancelled	Envelope # 16522	8 0.39 AM on behalf of Sam Smith by Firm Admin				
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8
O Submitting	Case # 1234					🖻 🗈 🗄
Location	Envelope # 165224 Submitted 01/28/2020 8	47 AM on behalf of Sam Smith by Firm Admin				
Any Location \$	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Case Number / Envelope Number	Accepted	Action - Subsequent Only	eFile and Serve			
Case Number	Envelope # 16522	3				🖹 🖴 🗄
	Envelope # 165223 Submitted 01/28/2020 8	29 AM on behalf of Sam Smith by Firm Admin				
Envelope Number	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Date Range	SubmissionFailed	Appendix	eFile Only			
Anytime     Last Month	Case # CC-19-347	7				🖻 🖹 🗄
O Last Week	Envelope # 165222 Submitted 01/28/2020 8	23 AM on behalf of Sam Smith by Firm Admin				
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8
From Date	Envelope # 16522					
To Date		17 AM on behalf of Sam Smith by Firm Admin				
RESET	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
	UnderReview	Complaint - w/ Hearing	eFile Only			

• Filing History page

- Figure 14.1 Example of a Filing History Page
  - Case Search page

EFILE QA 01 - EFM QA1 Case S	search		<b>?</b> -	۰.	<b></b> -	•••
Location: OFS QA 2017 Case Number: CC-	20-1475					
Case #CC-20-1475	Julia Reedv.Sam Muir				II 🔍	:
Location OFS QA 2017	Case Category Civil	Cese Type Breach Of Contract				
Previous 1 Next					1 Result(s	) Page 1 of 1
← DASHBOARD					REFIN	E SEARCH

Figure 14.2 – Example of a Case Search Page

• Bookmarks page

=- 🐝 EFILE QA 01 - EFM QA1 Bookmarks				<del>0</del> -	<b>.</b> -	<b></b> -	<b>⊷</b> •
lookmark Filter						5 Result(s) F	age 1 of
Case Location +	Case # CC-20-1475 Case Description Julia Reedy.Sam Muir	OFS QA 2017				II 🤇	:
case Number	Case # CC-21-2477	Location				±	:
case Description	Case # CC-21-2479	Location OFS QA 2017				±= 🔍	:
RESET	Case # CC-21-2499 Case Description Henry Ford vs Jane Doe	Lecation OFS QA 2017				±	:
	Case # CV-2021-019900 Case Description Henry Doe vs Maria Jones	Lecation OFS MockCMS				II 🔍	:
	Previous 1 Next					5 Result(s)	Page 1 o
			ß				
						٥	Help

Figure 14.3 – Example of a Bookmarks Page

## Adding a New Service Contact

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

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

The Service Contacts page is displayed.

≡ 🐝 eFile Service Contacts			0-	⊕• III• <b>≜</b> maaraata maanaa aha •
First Name	Last Name	Email Address	FILTER RESET	
First Name	Last Name	Email Address		Actions
Test	Contact	testcontact@gmail.com	1	
Susie	Potter	susiep@gmail.com		
Pro	Se	gmail.c	com	
Patte	Smith	patte.smith@gmail.com	1	
Russ	Smith	russ.smith@gmail.com		
Tonia	Smith	tsmith@gmail.com		
Previous 1 Next				6 Results Page 1 of 1

Figure <sup>•</sup>	14.4 –	Service	Contacts	Page
---------------------	--------	---------	----------	------



Additional fields are displayed.

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

Figure 14.5 – Service Contacts – Additional Fields

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

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

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

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

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

#### The default selection is United States.

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

13. After you have entered the required information, click

SAVE

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

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

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

FROM MY FIRM

1. On the Service page, click

The Firm Service Contacts window is displayed.

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



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

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

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

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

ASSOCIATED PARTIES

FILTER

The Associated Parties window is displayed.

Firm Service Contacts Asso	ciated Parties	
Select one or more parties to associa	te with the service contacts.	
Parties Select Parties		
Selected Service Contacts:		
Barbie Watson	barbie@gmail.com	
FIRM SERVICE CONTACTS		CANCEL SAVE

Figure 14.7 – Sample Associated Parties Window

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

Parties drop-down list, and then click

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

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

Mail	٩.
Certified Mail	
Mail	
Eserve	

Figure 14.8 – Sample Service Method Drop-Down List

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

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

reload Documents	Case Parties Filings <u>Ser</u>	vice Fees Summary		
Service Contact				
Service Contacts:				
FROM MY FIR	M ADD N	EW CONTACT		
arties		Service Contacts		Show
<sup>rpe:</sup> etitioner	Name: George Doe	Name	Email/Mail	Count
		No service contacts		
<sup>ipe:</sup> espondent	Name: Susanne Doe	Name	Email/Mail	Count
		No service contacts		
pe: VA	Name: Other Service Contacts	Name	Email/Mail	Count
		No service contacts		

Figure 14.9 – Example of a Service Page in a Case Filing

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

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

1. On the Service page, click

The Public Service Contacts window is displayed.

Public Serv	vice Contacts	Associated Parties		
Fill in at lea	ast one field and clic	ck FILTER to display public se	ervice contacts.	
First Name	Last Name	Email	Firm	FILTER RESET
			CANCEL	ASSOCIATED PARTIES

Figure 14.10 – Public Service Contacts Window

2. Type at least one letter in a field, and then click

The public service contacts that match the information you entered are displayed. The system returns a maximum of 100 public service contacts.

FILTER

The m	aximum of 100 public service contac	ts were returi	ed.	
First Name	Last Name	Email	Firm	
a a	Lost Name	Lindi		FILTER RESET
	xdbbqnmp.update qjnijdqt.update		xdbbqnmp.qjnijdqt@tylertech.co	m
	xsncpywh.update hoopjatu.update		xsncpywh.hoopjatu@tylertech.co	om
	xvbmornb.update tawnxbpw.update		xvbmornb.tawnxbpw@tylertech.	com
	xyjaqryh jvezoxrv		xyjaqryh.jvezoxrv@tylertech.com	I
	ydfkwmsc.update zadxmwvs.update	1	ydfkwmsc.zadxmwvs@tylertech	com
	yfxbhtia qejdvkgn		yfxbhtia.qejdvkgn@tylertech.con	ı
	yvemzhts.update lispdguk.update		rjrxykyo.ykwwddld@tylertech.co	n
	zclyrpby.update bvfbzkcd.update		zclyrpby.bvfbzkcd@tylertech.com	n
	zicpsjbf.update whlrcqyl.update		zicpsjbf.whlrcqyl@tylertech.com	
	zqwlczsm.update xwoymgnm.updat	e	zqwlczsm.xwoymgnm@tylertech	i.com
First	Previous 1 2 3 4 5	6 7 N	ext Last	100 Result(s) Page 7 of 7

Figure 14.11 – Sample Public Service Contacts List

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

ASSOCIATED PARTIES

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

The Associated Parties window is displayed.

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



SAVE

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

down list, and then click

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

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

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

Figure 14.13 – 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.

En 🤣 erile	QA 01 - EFM QA4 Service - Draft # 4279	0-		<b>?</b> - #	- 11-	2
Preload Documents	Case Parties Filings	Service Fees Summary				
m-Service Contact						
Add Service Contacts:						
FROM MY FIRM	M A+ FROM PUBLIC LIST	ADD NEW CONTACT				
Parties		Service Contacts				~
						Show All
Type: Petitioner	Name: George Doe	Name	Email/Mail			Count: 0
		No service contacts				
Type: Respondent	Name: Susanne Doe	Name	Email/Mail			Count: 0
		No service contacts				
Type: NA	Name: Other Service Contacts	Name	Email/Mail			Count: 0
		No service contacts				
	E DRAFT AND EXIT					FEES ->
		N				

Figure 14.14 – Example of a Service Page in a Case Filing

## Adding a New Service Contact to a Filing

You can add a new service contact to a filing.

To add a new service contact to a filing:

1. On the Service page, click

ADD NEW CONTACT

The Add Service Contact window is displayed.

Add Service Contact		
Parties Select Parties	•	
Add To Firm List	Add to Public List	
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 Select \$	Zip Code
		CANCEL SAVE

Figure 14.15 – Add Service Contact Window

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

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

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

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

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

#### The default selection is United States.

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

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

Figure 14.16 – Sample Associated Parties Window

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

down list, and then click

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

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

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

Mail	*
Certified Mail	
Mail	
Eserve	

Figure 14.17 – 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.

reload Documents	Case Parties Filings	<u>Service</u>	Fees Summary		
Service Contact					
Service Contacts:					
FROM MY FIRM	FROM PUBLIC LIST	ADD NEW CONTAC	T		
arties			Service Contacts		~
ipe:	Name:		Name	Email/Mail	Show A
etitioner	George Doe				Count: 0
			No service contacts		
ipe:	Name:		Name	Email/Mail	Count
espondent	Susanne Doe		Marca for costs as		Count
			No service contacts		
ipe:	Name:		Name	Email/Mail	<b>~</b>
14	Other Service Contacts				Count:
			No service contacts		

Figure 14.18 – Example of a Service Page in a Case Filing

## Updating Information for an Existing Service Contact

You can update the information that you previously entered for a service contact. To update the information for an existing service contact:

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

The Service Contacts page is displayed.

≡ ★ eFile Service Contacts			Q• ⊕•	
irst Name	Last Name	Email Address	FILTER RESET	ADD SERVICE CONTACT
First Name	Last Name	Email Address		Actions
Test	Contact	testcontact@gmail.con	n	
Susie 🔓	Potter	susiep@gmail.com		
Pro	Se	gmail.	.com	
Patte	Smith	patte.smith@gmail.con	n	
Russ	Smith	russ.smith@gmail.com	1	
Tonia	Smith	tsmith@gmail.com		
Previous 1 Next				6 Results Page 1 of



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

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

3. Update the information, as applicable.

#### SAVE

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 **Firm Service Contacts**.

The Service Contacts page is displayed.

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



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

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

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

Figure 14.21 – 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.	
c	CLOSE

Figure 14.22 – Service Contact Attached Cases Window – No Attached Cases

## Viewing Service Contact History

You can view the service contact history from the *Filing History* page, the *Case Search* page, or the *Bookmarks* page.

To view the service contact history for a case:

- 1. Locate the case for which you want to view the service contact history.
- 2. Click

The Service Contacts window for the specified case is displayed.

Service Contact d Service Conta				
FROM MY	Y FIRM	ADD NEW CONTACT		
arties		Service Contacts		Show A
<sub>ype:</sub> Defendant	Name: Sam Muir	Name	Email/Mail	Count:
		Click to expand		
<sub>ype:</sub> Plaintiff	<sub>Name:</sub> Julia Reed	Name	Email/Mail	Count:
		Click to expand		
<sub>ype:</sub> einholder	<sub>Name:</sub> Texas Fences	Name	Email/Mail	Count:
		No service contacts		
ype: VA	Name: Other Service Contacts	Name	Email/Mail	Count
		No service contacts		

Figure 14.23 – Example of a Case Service Contacts Window

SERVICE CONTACT HISTORY

3. Click

The Service Contact History window is displayed.

Service Contact H	listory	×
Name	Action	Date/Time
Test Attorney	Attach	11/01/2021 5:08 PM
Jojo Carey	Attach	11/01/2021 5:08 PM
Tim Cook	Attach	11/01/2021 5:08 PM
Tim Cook	Detach	11/01/2021 5:09 PM
Greg Jones	Attach	11/01/2021 5:09 PM
		CLOSE

Figure 14.24 – Example of a Service Contact History Window

## 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.

File Filing History					0- ⊕- ≣-	▲ maincinngeas
Filing History Filter	FILING HISTORY FILING DRAFTS	Ν				10 Result(s) Page 1 of 1
Created By	Envelope # 16524	1 :49 PM on behalf of Sam Smith by Firm Admin				
My Filings     My Firm	Filmo Status	Filing Code	Filma Type	Filmo Description	Client Ref #	
Status	Submitted	Appointment	eFile Only			8
All Statuses     Accepted     Cancelled	Envelope # 165228 Envelope # 165228 Submitted 01/28/2020 1	8 0.39 AM on behalf of Sam Smith by Firm Admin				
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8
O Submitting	Case # 1234 Envelope # 165224 Submitted 01/28/2020 8	:47 AM on behalf of Sam Smith by Firm Admin				
Any Location •	Filing Status Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #	
Case Number / Envelope Number	Envelope # 16522		er ne and Serve			
Case Number		29 AM on behalf of Sam Smith by Firm Admin				
Envelope Number Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #	
Anytime     Last Month     Last Week	Case # CC-19-347					r 🖹 🔛 😳
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8
From Date	Envelope # 16522	1 AM on behalf of Sam Smith by Firm Admin				
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #	

Figure 14.25 – 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.



× <b>b b</b>		× •	
Add To My List	Add to Public List		
✓ First Name ★	Middle Name	Last Name ★	
Tonia	muule name	Smith	
Email \star	Phone Number		
tsmith@gmail.com			
Country			
United States	\$		
Address Line 1 \star	Addre	ss Line 2	
555 Main Street			
City ≭	State	Zip Code ★	
Des Moines	Iowa		

Figure 14.26 – 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.

SAVE

To delete a service contact from the Service Contacts page:

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

The Service Contacts page is displayed.

E 🐝 eFile Service Contacts			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 14.27 – Service Contacts Page

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

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

# 15 Templates

#### Topics covered in this chapter

- 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			፼- ⊕- Ⅲ	• <u>•</u> •••••••••••••••••••••••••••••••••
Filter Type Firm Templates ¢	Name	FILTER RESET		
Favorite	Name	Туре		Actions
*	Tech Pubs Test	New Case		
☆	test	Existing Case		A :
☆	Template XYZ	New Case		
☆	Template ABC	New Case		۱
Previous 1 Next				4 Results Page 1 of 1





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 15.2 – 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

load Documents Case	Parties Filings Service Fees S	lummary				
Case				ø		
ocation DFS QA 2017	Category Family		Type Other Family Law Matters			
Parties				Show All	Case Parties	
ount: 2					Filings	
Filings				1	Service Fees	
Filing Type <b>eFile Only</b> Component	Filing Code Abstract Of Judgment Document Name	Client Ref # Description	Filing Description Security		SAVE TEMPLATE	
Lead Document Download Version Original	Civil Domestic Filing Form1.pdf	Abstract Of Judgment				
				1		
lone						
ees				1		
ayment 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 15.3 – 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			<b>∂</b> - ⊕- <b>Ⅲ</b> - <b>≜</b>
<sup>liter Type</sup> Firm Templates	Name \$	FILTER RESET	
Favorite	Name	Туре	Actions
*	Tech Pubs Test	New Case	
	test	Existing Case	Ø :
	Template XYZ	New Case	
습	Template ABC	New Case	
Previous 1 Next			4 Results Page 1

Figure 15.4 – 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

pages. Then click

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

## Using a New Case Template

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

To use a template that you previously created:

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

The Templates page is displayed.

= 🐝 eFile Templates					0-	<b>.</b>	<b></b> -	A CONSTRUCTION OF A CONSTRUCTURA A C
ilter Type Firm Templates	Name		FILTER RESET					ADD TEMPLATE
Favorite		Name	Туре					Actions
*		Tech Pubs Test	New Case					1
습		test	Existing Ca	se				Ø
습		Template XYZ	New Case					1
☆		Template ABC	New Case					۱
Previous 1 Next								4 Results Page 1 of

Figure 15.5 – Templates Page

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

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

M

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

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

## Using an Existing Case Template

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

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

The Filing History page is displayed.

					<b>⋳</b> - ⊕- ≣-	1
Filing History Filter	FILING HISTORY FILING DRAFTS	N				10 Result(s) Page 1 of 1
Created By	Envelope # 16524	1 49 PM on behalf of Sam Smith by Firm Admin				
My Filings     My Firm	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Status	Submitted	Appointment	eFile Only			
All Statuses     Accepted	Envelope # 16522	8				
O Cancelled	Envelope # 165228 Submitted 01/28/2020 1	0.39 AM on behalf of Sam Smith by Firm Admin				
Receipted     Served     Returned	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8
O Submitted O Submitting	Case # 1234					
Location	Enrelope # 165224 Submitted 01/28/2020 B AT AM on behalf of Sam Smith by Firm Admin					
Any Location +	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Case Number / Envelope Number	Envelope # 16522	Action - Subsequent Only	eFile and Serve			
Case Number		29 AM on behalf of Sam Smith by Firm Admin				
Envelope Number						
Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #	
Anytime     Last Month     Last Week	Case # CC-19-347 Envelope # 165222 Submitted 01/28/2020 8	7 23 AM on behalf of Sam Smith by Firm Admin				r 🗈 🔛 🗄
<ul> <li>Last Two Days</li> <li>Today</li> <li>Pick a Custom Range</li> </ul>	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8
From Date	Envelope # 16522	1				
To Date		17 AM on behalf of Sam Smith by Firm Admin				
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #	

Figure 15.6 – Filing History Page

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

A drop-down list is displayed.

3. Click File Into Case With Template.

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

lter Type		Name		
Firm Tem	plates	\$	FILTER	RESET
Location/ You can u	/Type/Category ma	tches the case, each temp n if there are mismatches.	and Case Category to your templates. If the te plate section will be created on the draft. The templates are listed in best match order. I eate the entire template, but your draft might no	f you select a
template's	s documents or op	tional services.		
template <sup>t</sup> Favorite	s documents or op Name	tional services.	Template Matches On 😧	Actions
		tional services.	Template Matches On 🚱	Actions

Figure 15.7 – Templates Matching Window

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

L
٩.,

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 SUBMIT

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

## Copying a Template

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

To copy an existing template:

1. On the Dashboard menu, click Templates.

The Templates page is displayed.

≡ 🐝 eFile Templates				Ø- (	)- Ⅲ-	La Filleric Contageneers. Colo -
iter Type Firm Templates	Name		FILTER RESET			
Favorite		Name	Туре			Actions
*		Tech Pubs Test	New Case			۵
☆		test	Existing Case			Ø
☆		Template XYZ	New Case			1
		Template ABC	New Case			۱
Previous 1 Next						4 Results Page 1 o

Figure 15.8 – Templates Page

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

A drop-down list is displayed.



Figure 15.9 – More Options Drop-Down List

3. Click Copy Template.

The template name is displayed in a separate pane with "Copy" as part of the name.

- 4. Rename the template to a different name.
- 5. Select the Favorite check box if you want to designate this template as a favorite.



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

EDIT DETAILS ->

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

## **Deleting a Template**

You can delete a template that you no longer need.

To delete an existing template:

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

The Templates page is displayed.

= 🐝 eFile Templates				<b>0</b> - ⊕- Ⅲ	• <u>•</u> •••••••••••••••••••••••••••••••••
<sup>itter Type</sup> Firm Templates	Name \$		FILTER RESET		ADD TEMPLATE
Favorite		Name	Туре		Actions
*		Tech Pubs Test	New Case		۲
		test	Existing Case		Ø :
		Template XYZ	New Case		1
<u>ት</u>		Template ABC	New Case		1
Previous 1 Next					4 Results Page 1 of

Figure 15.10 – Templates Page

<u> </u>	$-1 + \cdots + 4 + 4 + 4 + 4 + 4 + 4 + 4 + 4 + 4$	
2.	Locate the template that you want to delete, and then click	
<u> </u>	Ecode and tomplate that you mant to delote, and then one	

A drop-down list is displayed.



Figure 15.11 – More Options Drop-Down List

3. Click Delete Template.

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

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

## **16** 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.

File Filing History					Ø· ⊕· ≣·	A 1996710-7071924841-7081-
Filing History Filter	FILING HISTORY FILING DRAFTS	D				10 Result(s) Page 1 of 1
Created By	Envelope # 16524	1 49 PM on behalf of Sam Smith by Firm Admin				
My Filings My Firm	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Status	Submitted	Appointment	eFile Only			8
All Statuses     Accepted     Cancelled	Envelope # 165228 Envelope # 165228 Submitted 01/28/2020 10	8 0.39 AM on behalf of Sam Smith by Firm Admin				
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8
O Submitting	Case # 1234 Envelope # 165224 Submitted 01/28/2020 8:	47 AM on behalf of Sam Smith by Firm Admin				🖻 🖹 🗄
Any Location \$	Filing Status Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #	
Case Number / Envelope Number	Envelope # 16522		er ne and Serve			
Case Number		29 AM on behalf of Sam Smith by Firm Admin				
Envelope Number Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #	
Anytime     Last Month     Last Week	Case # CC-19-347 Envelope # 165222 Submitted 01/28/2020 8:					n 🖹 📰 👬
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8
From Date	Envelope # 16522	1 17 AM on behalf of Sam Smith by Firm Admin				
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Cluent Ref #	

FILTER

Figure 16.1 – 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 16.2 – 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>8-</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.						
						Cong files here or BROWSE				
Maximum Filesize: 50.00 MB Supported File Types: MPEG (MPEG) Pr	Maximum Filester: 50.00 MB Supported File Types: MPSG (MPSG) Portable Document File (PDF) TIFF Files (TIFF TIF) Windows Media File (WMV) Word 2007 File (DOCX) Word 97/XP File (DOC) WordPerfect File (WPO) XML Document (XAL).									
SAVE DRAFT AND EXIT							SKIP TO FILINGS 🗲	→ c	ASE INFORM	ATION →

Figure 16.3 – 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 16.4 – 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.

■					Ø· ⊕· <b>Ⅲ</b> ·	1 marts 111 galaxy 110			
Filing History Filter	FILING HISTORY FILING D					10 Result(s) Page 1 of 1			
Created By	Envelope # 16								
My Filings     My Firm	Envelope # 165241 Submitted 01/	28/2020 3:49 PM on behalf of Sam Smith by Firm Admin	Filing Type	Filing Description	Client Ref #				
Status	Submitted	Appointment	eFile Only			×			
All Statuses     Accepted     Cancelled	Envelope # 16 Envelope # 165228 Submitted 01/	5228 28/2020 10.39 AM on behalf of Sam Smith by Firm Admin							
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8			
O Submitting		Case # 1234							
Any Location e	Filing Status Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #				
Case Number / Envelope Number	Envelope # 16								
Case Number		28/2020 8:29 AM on behalf of Sam Smith by Firm Admin							
Envelope Number Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filling Description	Client Ref #				
Anytime     Last Month     Last Week	Case # CC-19 Envelope # 165222 Submitted 01/	-3477 28/2020 8:23 AM on behalf of Sam Smith by Firm Admin							
Last Two Days     Today     Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8			
From Date	Envelope # 16	5221				B 💷 :			
To Date	Envelope # 165221 Submitted 01/	28/2020 8:17 AM on behalf of Sam Smith by Firm Admin							
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #				

Figure 16.5 – 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 Samme 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	teority Confidential (T)	
Service				Hido at
marty ales wei@sdg.com Status: NotSent 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 16.6 – Sample Envelope Details Page

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

## Viewing Case Address Information in the Envelope Details

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

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

To view the case address information in the envelope details:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.

= 🐝 eFile Filing History					<b>0</b> - ⊕- ≡-	1			
Filing History Filter		JNG DRAFTS				10 Result(a) Page 1 of 1			
Created By	Envelope #								
My Filings	Envelope # 165241 Submit	ted 01/28/2020 3:49 PM on behalf of Sam Smith by Firm Admin	Films Type	Filmo Description	Client Ref #				
Status	Submitted	Appointment	eFile Only	Filing Description	Chent Het #	×			
All Statuses     Accepted     Cancelled	Envelope # Envelope # 165228 Submit	ted 01/28/2020 10.39 AM on behalf of Sam Smith by Firm Admin							
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8			
O Submitting		Case # 1234 🔊 🗈 🗊 🗐							
Any Location	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #				
Case Number / Envelope Number	Envelope #	Action - Subsequent Only	eFile and Serve						
Case Number		ted 01/28/2020 8:29 AM on behalf of Sam Smith by Firm Admin							
Envelope Number Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #				
Anytime     Last Month     Last Week	Case # CC- Envelope # 165222 Submit	-19-3477 Red 01/28/2020 8:23 AM on behalf of Sam Smith by Firm Admin	,						
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref $\pi$	×			
From Date	Envelope #	165221				B 💷 🗄			
To Date	Envelope # 165221 Submit	ted 01/28/2020 8:17 AM on behalf of Sam Smith by Firm Admin							
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Closest Ref #				

Figure 16.7 – 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 16.8 – 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.

■					<b>0</b> - ⊕- <b>Ⅲ</b> -	1 marts 111 galaxy 110			
Filing History Filter	FILING HISTORY FILING D					10 Result(s) Page 1 of 1			
Created By	Envelope # 16								
My Filings     My Firm	Envelope # 165241 Submitted 01/	28/2020 3:49 PM on behalf of Sam Smith by Firm Admin	Filing Type	Filing Description	Client Ref #				
Status	Submitted	Appointment	eFile Only			×			
All Statuses     Accepted     Cancelled	Envelope # 16 Envelope # 165228 Submitted 01/	5228 28/2020 10.39 AM on behalf of Sam Smith by Firm Admin							
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8			
O Submitting		Case # 1234							
Any Location e	Filing Status Accepted	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #				
Case Number / Envelope Number	Envelope # 16								
Case Number		28/2020 8:29 AM on behalf of Sam Smith by Firm Admin							
Envelope Number Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filling Description	Client Ref #				
Anytime     Last Month     Last Week	Case # CC-19 Envelope # 165222 Submitted 01/	-3477 28/2020 8:23 AM on behalf of Sam Smith by Firm Admin							
Last Two Days     Today     Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref #	8			
From Date	Envelope # 16	5221				B 💷 :			
To Date	Envelope # 165221 Submitted 01/	28/2020 8:17 AM on behalf of Sam Smith by Firm Admin							
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #				

Figure 16.9 – 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	5			PRINT CLOSE
Case				
OFS QA 2017	Civil		Type Appeal	
Parties				Show All
Filings				
ráng Type eFile Only	Hing Code Abstract Of Judgment	Chectiful #	Filing Description	
Siderited Date 01/21/2021 11:13 AM	flater Accepted	Illeever Date 01/21/2021 11:16 AM	Comments Auto Review Accepted	
Component Attachments Downland Version	Document Name Petition, pdf	Description	Security Public (G)	
Original Cargonet Lead Document Doorlinal/waten	Court Copy DocumentNerw BlankTest.pdf	Description	Security Public (G)	
Original	Court Copy			
Service <sub>Caset 2</sub>				Show All
Fees				
Payment Account Firmfu CC Order 10 000225195-0	Hing Atomey Abby Carmichael Inmedian Ingenese Approved	Party Reponsible for Yean Natorni Watston Immundura Amant \$20.00	File Type AutoReview Immaction ID 260829	
	нричка			
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 16.10 – 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.

= 🐝 eFile Filing History					<b>0</b> - ⊕- ≡-	1			
Filing History Filter		JNG DRAFTS				10 Result(a) Page 1 of 1			
Created By	Envelope #								
My Filings	Envelope # 165241 Submit	ted 01/28/2020 3:49 PM on behalf of Sam Smith by Firm Admin	Films Type	Filmo Description	Client Ref #				
Status	Submitted	Appointment	eFile Only	Filing Description	Chent Het #	×			
All Statuses     Accepted     Cancelled	Envelope # Envelope # 165228 Submit	ted 01/28/2020 10.39 AM on behalf of Sam Smith by Firm Admin							
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8			
O Submitting		Case # 1234 🔊 🗈 🗊 🗐							
Any Location	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #				
Case Number / Envelope Number	Envelope #	Action - Subsequent Only	eFile and Serve						
Case Number		ted 01/28/2020 8:29 AM on behalf of Sam Smith by Firm Admin							
Envelope Number Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #				
Anytime     Last Month     Last Week	Case # CC- Envelope # 165222 Submit	-19-3477 Red 01/28/2020 8:23 AM on behalf of Sam Smith by Firm Admin	,						
O Last Two Days O Today O Pick a Custom Range	Filing Status Submitted	Filing Code Acknowledgment Of Paternity	Filing Type eFile Only	Filing Description	Client Ref $\pi$	×			
From Date	Envelope #	165221				B 💷 🗄			
To Date	Envelope # 165221 Submit	ted 01/28/2020 8:17 AM on behalf of Sam Smith by Firm Admin							
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Closest Ref #				

Figure 16.11 – Filing History Page

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

The envelope details are displayed.

ase				
ation S QA 2017	Category Civil		ype Breach Of Contract	
arties				Show
lings				
Filing Type eFile Only Submitted Date 01/21/2021 10:32 AM	Filing Code Abstract Of Judgment Status Accepted	Client Ref # Review Date 01/21/2021 10:35 AM	Filing Description Comments Auto Review Accepted	
Component Lead Document	Document Name BlankTest.pdf	Description	Security Public (G)	
Download Version Original	Court Copy			
ervice				Hide
Firm Admin P@gmail.com Status: Sent (Opened) Served Date: 01/21/2021 10:35 AM	Service Method: Eserve	Lillian Henderson 1201 tenth ave Plano US, Texa Status: Not Sent		
Associated Parties: None	Opened Date: 01/21/2021 11:08 AM	Tracking: 0000000000000000	000075025 (USPS)	
Raymond Thompson 4201 Ohio Dr Dallas US, Texas 51atus: Not Sent Tracking: 000000000000000000000075024 (USPS	Service Method: Mail			

Figure 16.12 – 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>9</b> -	<b>.</b>	<b></b> .	• ************************************
Filing Drafts Filter	FILING HISTORY FILING	DRAFTS						23 Result(s) Page 1 of 2
Created By	Case # CC-19 Draft # 6749 Started 11/5/19 9:							
<ul> <li>My Filings</li> <li>My Firm</li> </ul>	Filing Status	Filing Code	Filing Type	Filing Description		Clier	t Ref #	
Location	Draft # 6722		eFile Only					
Any Location \$	Draft # 6722 Started 10/31/19 2							
Case Number / Draft Number	Filing Status	Filing Code	Filing Type	Filing Description		Clier	t Ref #	
Case Number	Draft	Acknowledgement	eFile and Serve	Acknowledgement				
Draft Number	Case # CC-19							
Date Range	Draft # 6702 Started 10/30/19 2	:30 PM on behalf of Jack Stone by Firm Admin						
Anytime     Last Month	Filing Status UnexpectedError	Filing Code Acknowledgement	Filing Type eFile and Serve	Filing Description Acknowledgement		Clier	t Ref #	
O Last Week	Draft # 6689							
O Last Two Days O Today	Draft # 6689 Started 10/28/19 5	31 PM on behalf of Abby Carmichael by Firm A	dmin					
O Pick a Custom Range	Filing Status Draft	Filing Code Proposed Order	Filing Type eFile Only	Filing Description Proposed Order		Clier	t Ref #	
To Date	Case # cc-14	5333						► <b>1</b> :
	Draft # 5611 Started 10/15/19 9							
RESET FILTER	Case # CC-19	9-3477						
	Draft # 5610 Started 10/15/19 9	:17 AM by Firm Admin						

Figure 16.13 – 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					<b>⋳</b> - ⊕- Ⅲ-	L				
Filing Drafts Filter		NG DRAFTS				23 Result(s) Page 1 of 2				
Created By		ase # CC-19-3477 (# 6749 Started 11/5/19 953 AM by Firm Admin								
<ul> <li>My Filings</li> <li>My Firm</li> </ul>	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #					
Location	Draft # 6722	<u>ר</u>	eFile Only							
Any Location \$	Draft # 6722 Started 10/31/1	_								
Case Number / Draft Number	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #					
Case Number	Draft	Acknowledgement	eFile and Serve	Acknowledgement						
Draft Number	Case # CC-1	19-3477								
Date Range	Draft # 6702 Started 10/30/1	9 2:30 PM on behalf of Jack Stone by Firm Admin								
Anytime     Last Month	Filing Status UnexpectedError	Filing Code Acknowledgement	Filing Type eFile and Serve	Filing Description Acknowledgement	Client Ref #					
O Last Week	Draft # 6689	9								
O Last Two Days O Today	Draft # 6689 Started 10/28/1	9 5:31 PM on behalf of Abby Carmichael by Firm A	ldmin							
O Pick a Custom Range From Date	Filing Status Draft	Filing Code Proposed Order	Filing Type eFile Only	Filing Description Proposed Order	Client Ref #					
To Date	Case # cc-1	45333								
	Draft # 5611 Started 10/15/1									
RESET FILTER	Case # CC-1	19-3477								
	Draft # 5610 Started 10/15/1	9 9:17 AM by Firm Admin								

Figure 16.14 – Filing Drafts Page

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

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



## **Canceling a Filing**

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

To cancel a filing:

1. On the Dashboard menu, click Filing History.

The Filing History page is displayed.

■					@- ⊕- ≣-	2 (100011):101104(data)::100-
Filing History Filter		G DRAFTS				10 Result(s) Page 1 of 1
Created By	Envelope # 1					
My Filings     My Firm	Envelope # 165241 Submitted	01/28/2020 3:49 PM on behalf of Sam Smith by Firm Admin	Filing Type	Filing Description	Client Ref #	
Status	Submitted	Appointment	eFile Only			8
All Statuses     Accepted     Cancelled	Envelope # 165228 Submitted	165228 01/28/2020 10:39 AM on behalf of Sam Smith by Firm Admin				
Receipted     Served     Returned     Submitted	Filing Status Submitted	Filing Code Abstract Of Judgment	Filing Type eFile Only	Filing Description	Client Ref #	8
O Submitting	Case # 1234	01/28/2020 8:47 AM on behalf of Sam Smith by Firm Admin				
Location						
Any Location	<ul> <li>Filing Status</li> <li>Accepted</li> </ul>	Filing Code Action - Subsequent Only	Filing Type eFile and Serve	Filing Description	Client Ref #	
Case Number / Envelope Number	Envelope # 1	165223				
Case Number		01/28/2020 8:29 AM on behalf of Sam Smith by Firm Admin				
Envelope Number						
Date Range	Filing Status SubmissionFailed	Filing Code Appendix	Filing Type eFile Only	Filing Description	Client Ref #	
Anytime     Last Month     Last Week	Case # CC-1 Envelope # 165222 Submitted	9-3477 01/28/2020 8:23 AM on behalf of Sam Smith by Firm Admin				
O Last Two Days O Today	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
O Pick a Custom Range	Submitted	Acknowledgment Of Paternity	eFile Only			×
From Date	Envelope # 1	165221				E
To Date	Envelope # 165221 Submitted	01/28/2020 8:17 AM on behalf of Sam Smith by Firm Admin				
RESET	Filing Status UnderReview	Filing Code Complaint - w/ Hearing	Filing Type eFile Only	Filing Description	Client Ref #	

Figure 16.15 – Filing History Page

2. Locate the filing that you want to cancel.

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



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

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

If you clicked

, a confirmation message is displayed, and the filing is canceled.

## 17 Bookmarks

#### Topics covered in this chapter

- Creating a Bookmark for a Case
- Removing a Bookmark from a Case
- Viewing a List of Bookmarked Cases

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

≡ 🐝 eFile Bookmarks				<b>9</b> -	<b>.</b>	<b></b> .	A
Bookmark Filter							4 Results Page 1 of 1
Case Location	Case # CC-15-1813	Location Unknown Location	Case Description				
Any Location Case Number	Case # CC-19-2373	Location OFS QA 2017 - Court at Law	Case Description Drina Colin v. McDonald Associates LLC				
Case Number	Case #	Location	Case Description				
Case Description	CC-19-3477	OFS QA 2017					
Case Description           RESET         FILTER	Case # CC-19-438	Location OFS QA 2018	Case Description				
	Previous 1 Next		C,				4 Results Page 1 of

Figure 17.1 – 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>?</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 # CC-19-2373	Location OFS OA 2017 - Court at Law	Case Description Drina Colin v. McDonald Associates LLC			
Case Number		oroquitaria				
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 17.2 – 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 17.3 – 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

# **18** Bulk Filing

#### Topics covered in this chapter

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

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

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

BULK ADD FILINGS

Bulk filing begins on the *Start Filing* page. Then, complete the required fields for the first filing, followed by the next filing, and so forth. After you have prepared all of the filings for a bulk, you can view the fees for each filing, and choose the party responsible for fees, along with the payment method, for each filing. When you are done, you can submit the bulk in its entirety.

A bulk filing must contain either all initial filings or all subsequent filings.

After a bulk filing has been created, you can add additional filings to the drafts using the Bulk Add Filings

feature. Click Filing Dashboard page.

when it is enabled on the Bulk

### Dashboard

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

Ð	Dashboard	Ĺ
Q	Case Search	L
≔	Filing History	L
ø	Filing Drafts	L
≣	Bulk History	L
ø	Bulk Drafts	L
	Bookmarks	L
Т	Templates	L
-	Firm Users	L
	Firm Attorneys	L
	Firm Payment Accounts	L
0	Firm Details	L
B	Firm Service Contacts	L
¢	Reports	

Figure 18.1 – Dashboard

From here, you can perform the following actions:

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

#### **Bulk History**

The *Bulk History* page includes the filing history for your and your firm's bulk filings.

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

🗐 🤹 🤹 EFILE QA 01 Bulk His	story				<b>8</b> -	۰.	<b></b> -	
Filing History Filter	FILING HISTORY FILING D	RAFTS BULK HISTORY BULK	DRAFTS					1 Result(s) Page 1 of 1
Created By O My Filings	Bulk # 135 - Bu							
My Firm     Bulk Number / Name	Envelope # 1							B
Bulk Number	Envelope # 157679 Submitted	04/14/2021 5:16 PM on behalf of Tim Ande	ws by Lauren Groswald					
Bulk Name	OFS QA 2017							
Status All Statuses	Filing Status Submitted	Filing Code Acknowledgement	Filing Type EfileAndServe	Filing Description			Client Ref #	×
Accepted     Cancelled     Cancelled     Served     Returned     Submitted     Submitting	Envelope # 1 Envelope # 157680 Submitted I Location OFS QA 2017	157680 04/14/2021 5:16 PM on behalf of Tim Ande	ws by Lauren Groswald					B
Location	Filing Status Submitted	Filing Code Proposed Order	Filing Type EfileAndServe	Filing Description			Client Ref #	8
Any Location +								
Case / Envelope Number	Envelope # 1							Ē.
Case Number	Location	04/14/2021 5:16 PM on behalf of Tim Ande	ws by Lauren Groswald					
Envelope Number	OFS QA 2017							
Date Range Anytime	Filing Status Submitted	Filing Code Acknowledgement	Filing Type Efile	Filing Description			Client Ref #	8
C Last Month	Previous 1 Next							1 Result 1 D Help

Figure 18.2 – Sample Bulk History Page

#### **Bulk Drafts**

The Bulk Drafts page includes the drafts of your and your firm's bulk filings.

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

≡• 🐝 eFille QA 01 Bulk Draft	ts			<b>@</b> -	<b></b> -	A
Bulk Drafts Filter	FILING HISTORY FILING DRAFTS	BULK HISTORY BULK DRAFTS				Filters Applied 1 Result(s) Page 1 of 1
Created By	Bulk # 136 - Wedne	esday Test				
O My Filings My Firm	Bulk # 136 Started 04/14/2021 5:21 PM by Lau					
Bulk Number / Name	Draft # 817					
Bulk Number	Draft # 817 Started 04/14/2021 5:21 PM b	y Lauren Groswald				
Bulk Name	OFS QA 2017					
Location	Filing Code	Filing Type	Filing Description		Client Ref #	
Any Location +	Acknowledgement	Efile				
Case / Draft Number	Draft # 818					
Case Number	Draft # 818 Started 04/14/2021 5:24 PM b	y Lauren Groswald				
Draft Number	OFS QA 2017					
Date Range	Filing Code	Filing Type	Filing Description		Client Ref #	
Anytime	Acknowledgement	Efile				
O Last Month	Previous 1 Next					1 Result(s) Page 1 of 1
<ul> <li>Last Week</li> <li>Last Two Days</li> </ul>	Hereda Hereda					
O Today						
Pick a Custom Range						
From Date						
To Date						
			N			
RESET FILTER			6			
						Ø Help

Figure 18.3 – Sample 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 manual and -
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Lossion * Select				
Location is Required.				
← DASHBOARD				
				() Help

Figure 18.4 – 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.					
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					
[3					
	Ø Help				
© 2021 Tyler Technologies, Inc.   All I	Rights Reserved   Version: 0.0.0.1676				

Figure 18.5 – 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 18.6 – Start Filing Page—Bulk Filing Supported

START MULTIPLE NEW CASES

3. Click

The Bulk Filing window is displayed.

Bulk Filing		×
Bulk Name		
	CANCEL	CONTINUE

Figure 18.7 – Bulk Filing Window



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

The Bulk Filing Dashboard page is displayed.

=- ★ EFILE QA 01 Bulk Filing Dashboard				<b>0</b> - ⊕- Ⅲ-	
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below.	Bulk # 157 - Sports	Cases			2 draft(s).
If you wish to edit or add details to a specific draft, you may do so.	Draft # 992				i
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 18.8 – 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.

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

😑 - 🤸 erit Galo 1 - Erit Gal 1 - Erit Gal 1 - Erit Gal 1 - Erit Gal 2 - Bulk # 328 - Sports Cases - Draft # 7618 🕕 -	<b>?</b> -	<b>.</b> -	•	•
Patoal Documents Case Planties Filings Service				
document.pdf				
Drag files here or     BROWSE				
Marinum Fiesiac 50.00 MB				
Supported File Types: MPEG (MPEG) Portable Document File (P0F) TIFF Files (TIFF TIF) Windows Media File (WMV) Word 2007 File (DOC); Word 97/XIP File (DOC); WordParfect File (WP0) XML Document (XML).				
SAVE DRAFT AND EXIT		с	ASE INFORM	ATION ->

to view the case number or draft



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 - EFIM QA1 Case Information - Bulk # 328 - Sports Cases - Draft # 7618 0 -	Ø• <b>⊕</b> •	<b></b> -	•
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.hcdistrictclerk.com/Common/Civil/EFiling.aspx			
Case Type *	Case Sub Type		
Other Family Law Matters × +	Select		•
← FRELOAD DOCUMENTS SAVE DRAFT AND EXIT	ADD DRAFT	PAR	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.

to view the case number or draft number.

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

To enter case information:

- 1. On the Case Information page, select the 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.

=- 🐝 BFILE QA 01 - 1	EFM QA1 Parties - Bulk # 328 - Sports Cases - Dra	aft # 7618 🔋 👻				<b>?</b> -	⊕- I	• 🕛	
Preload Documents Ca	Case Partles Filings Service	$\rangle$							
Party Type	Required Party	Party Name		Lead Attorney				Actions	
Respondent	This is a required Party						4	ø	
Personal 🛕 🛛 A	Address Additional Identifiers							Hide Details	
Party Type Respondent									
Personal Information	n								
First Name *		Middle Name		Last Name *	Suffix Select			•	
First Name is Required.				Last Name is Required.					
Party CMS ID		Select	٥						
Attorney Information	1								
ADD/EDIT ATTORNEYS	<u>**</u>						GO TO	ADDRESS	
Petitioner	This is a required Party						4	1	1
								ADD PARTY	
CASE INFORMATION S	SAVE DRAFT AND EXIT			ß		ADD DR	AFT •	FILINGS →	Ē

Figure 18.11 – 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.
- Complete the First Name,Middle Name (if applicable), and Last Name fields. Also, if appropriate, select the party's suffix from the Suffix drop-down list.
- 3. Type the party case management system ID in the **Party CMS ID** field, if appropriate.
- 4. Select a language from the Interpreter drop-down list, if appropriate.

5. Click

to select the filing attorney.

The Attorneys window is displayed.

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	Next		3 Result(s) Page 1 of 1
		CANCEL	LEAD ATTORNEY

Figure 18.12 – Attorneys Window

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

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

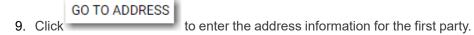
LEAD ATTORNEY

Name	Lead Attorney
Abby Carmichael	0
Perry Mason	•
	Abby Carmichael





The *Parties* page is displayed, listing the attorneys that you selected.



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 Addreb	s Additional Identifiers				Hide Details
Country United States Address Line 1		¢	Address Line 2		
City		State Select Phone Number 🚯	\$	Zip Code	
					GO TO ADDITIONAL IDENTIFIERS

Figure 18.14 – Address Tab on the Parties Page

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

11. Click	GO TO ADDITIONAL	IDENTIFIERS	to add more information for the specified par	ty.
Party Type	Required Party	Party Name	Lead Attorney	Actions
Defendant	This is a required Party	John Doe		
Plaintiff	This is a required Party	Susan Doe		1
Personal	Address Additional Identifiers			Hide Details
This is test content f	for Firm-Party-Additional Identifiers.			
Driver License Type		Driver License State	Driver License Number	
Select	+	Select	\$	
Social Security Number				
Date of Birth		Gender		
MM/DD/YYYY	<b></b>	Select	\$	

Figure 18.15 – Additional Identifiers Tab on the Parties Page

- 12. Select the type of driver's license from the Drivers License Type drop-down list.
- 13. Select the state where the driver's license was issued from the Drivers License State drop-down list.
- 14. Type the party's driver's license number in the Drivers License Number field.
- 15. Type the party's Social Security number in the Social Security Number field.

Note: After you type the Social Security number, asterisks are displayed to hide the number.

- 16. Type the party's date of birth in the **Date of Birth** field, or click to select the date from the calendar.
- 17. Select the party's gender from the Gender drop-down list.



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

20. If you have another party to add to the case, click parties have been added to the case.
21. Click ADD DRAFT (1 / 2) ▲ to add another filing to the bulk, or click FILINGS → to save your work and to continue.

## Entering Filing Details for a Bulk Filing

The Filings section allows you to enter the filing details.

🔸 🤹 EFILE QA 01 - EFM QA1 Filir						
oad Documents Case P	arties Filings Service					
) Code	Client Ref #	Filing Description				Actions
ract Of Judgment					<b>A</b> .	/ 1
Details Optional Services	Communication					Hide Deta
est Content filing details Firm. For mo	re information visit: www.google.com					
ing Type 🛊		Filing Code 🕸				
eFile Only		<ul> <li>Abstract Of Judgr</li> </ul>	nent - \$5.00			× +
ing Description			Client Reference Number			
omments to Court 🚯						
dd comment here						
					GO TO OPTIONAL SE	ERVICES
ing on bakalf of 🚯					GO TO OPTIONAL SE	ERVICES
ing on balaif of 🚱					GO TO OPTIONAL SE	ERVICES
					GO TO OPTIONAL SI	ERVICES
ASSOCIATED PARTIES	Name	Actions	Description	Security	GO TO OPTIONAL SE	ERVICES
associated parties	Nano	Actions SELECT DOCUMENTS	Description This document is required.	Security	GO TO OPTIONAL SE	ERVICES
ASSOCIATED PARTIES	Name			Security	GO TO OPTICIMAL SI	ERVICES
ASSOCIATED PARTIES Occuments* Component Lead Document	Name	SELECT DOCUMENTS		Security	GO TO OPTICIMAL SI	ERVICES
ASSOCIATED PARTIES Occuments* Component Lead Document	Name	SELECT DOCUMENTS		Security		
ASSOCIATED PARTIES Occuments* Component Lead Document	Nano	SELECT DOCUMENTS		Security		

Figure 18.16 – Sample Filings Page

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

to view the case number or draft number.

#### To enter the filing details:

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

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

#### GO TO OPTIONAL SERVICES

Note: Some courts require you to select an optional service. When an optional service is required, you must click the Optional Services tab and select the required service.

Ξ - 🤹 EFILE QA 01 - EFM QA1 β	Filings - Draft # 7709 🛛 🔹			<b>0</b> -	
eload Documents Case	Parties Filings Service	Fees Summary			
ing Code	Client Ref #	Filing Description			Actions
stract Of Judgment					🔺 🖉 🧵
Details Optional Services	Communication				Hide Detail
Test content filing details optional se	ervices firm.				
Not Selected			Selected		
Once Per Party	\$10	÷	← Certified Copies *	?? x \$17	
Per Page Fee Service	?? x	÷	Multiplier *		
Priority Processing	?? x \$17	<b>→</b>			
Split Fee Service	\$10	<b>→</b>	Multiplier is Required.		
TOGA Decline Error	\$260	<b>→</b>			
Garnishment I	?? x \$??	<b>→</b>			
Garnishment II	\$??	<b>→</b>			
Per Page Fee No Multiplier		<b>→</b>			
					GO TO COMMUNICATION
Filing on behalf of <b>()</b>					
ASSOCIATED PARTIES					

The **Optional Services** tab is displayed.

Figure 18.17 – Sample Optional Services Tab

7. To select the applicable optional services, click



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

Code	Client Ref #	Filing Description			Action
act Of Judgment	ORTH THE P	Thing beauptor			
					4 🖉
Details Optional Services	Communication				Hide D
est content filing details optional	services firm.				
Not Selected			Selected		
Once Per Party	\$10	÷	← Certified Copies*	1 × \$17 = \$17	
Per Page Fee Service	?? x	÷	Multiplier *		
Priority Processing	?? x \$17	÷	1		
Split Fee Service	\$10	÷			
TOGA Decline Error	\$280	÷			
Garnishment I	?? x \$??	÷			
Garnishment II	\$??	÷			
Per Page Fee No Multiplier		÷			
					GO TO COMMUNICATION

Figure 18.18 – Sample Optional Services Tab with an Optional Service Selected

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

However, if a specified optional service is required by your court, you must select that service.
 GO TO COMMUNICATION
 Click to specify the recipient of the courtesy or preliminary copies. You must type a valid email address for the recipient.

9. Click

to associate parties with the filing.

The Associate Parties to this Filing window is displayed.

Associate Parties to t	his Filing				
First Name	Last Name	Entity	Party Type Select	<b>♦</b> 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 18.19 – 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.

	SAVE	1	
13. Click	_		
			SELECT DOCUMENTS

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 18.20 – Documents Pane

Select document(s)	for Lead Docume	ent		×
Not Selected		Selected		
test.pdf	→ <b>Ī</b>			
Academic_Calendar	→			
	🟠 Drag files here or	BROWSE		
: Maximum Filesize: <b>50.00 MB</b>				
Supported File Types: TIFF Files (	TIFF TIF) WordPerfect File (WPI	) Word 2007 File (DO	CX) Word 97/XP File (DOC) Portab	ole
Document File (PDF) XML Docun	nent (XML) Windows Media File	(WMV) MPEG (MPEG)	l.	
			CANCEL	SAVE

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

Figure 18.21 – 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	SELECT DOCUMENTS in the Attachments section.
18. If you want to add security to any of the documer	nts, select an option from the <b>Security</b> drop-down list.
19. Click service → to save your work and cont	ADD DRAFT (1 / 2)  to add another
draft filing, or click	ur 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>8</b> -	<b>.</b> -	<b></b> -	•
Bulk # 157 - Sports Cases								
After filling in the required fields, click on "CALCULATE FEES" at the bottom of the page. To	view the fee det	ails on individual drafts, cl	ick on "FEE DETAILS".					
Apply Payment Account to All Drafts			Apply Filing Attorney to All Drafts					
Select   APPLY TO ALL*			Select		• A	APPLY TO ALL		
* Payment accounts may be restricted at some locations								
Draft # 992								
Location Cas OFS QA 2017 Ch	se Category ivil			Case Type Negligence				
Payment Account 🚸		Party Responsible for Fees						
Lauren's Waiver	٠	Select		٥	SE	ARCH		
Filing Attorney 🚯 \star		Filer Type						
Select	•	Select				•		
Filing Attorney is Required.								
Draft # 993								
Location Cas OFS QA 2017 Ch	se Category ivil			Case Type Malpractice				
Payment Account 🗰		Party Responsible for Fees						
Lauren's Waiver	٠	Select		•	SE	ARCH		
Filing Attorney 🕲 *		Filer Type						
Select	•	Select				÷		
Filing Attorney is Required.								
+ BULK DASHBOARD SAVE DRAFT AND EXIT								CALCULATE FEES
	© 202	l Tyler Technologies, Inc.   All Ri	hts Reserved   Version: 0.0.0.1804		~			

Figure 18.22 – 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:

Note: If you do not want to apply the same payment account and filing attorney to all of the draft

filings in the bulk, you must select the payment account and the filing attorney for each individual draft filing.

1. Select the payment account from the Apply Payment Account to All Drafts drop-down list. Then, click

```
APPLY TO ALL*
```

to apply the selected payment account to all of the draft filings in the bulk.

2. Select the filing attorney from the Apply Filing Attorney to All Drafts drop-down list. Then, click

```
APPLY TO ALL*
```

to apply the selected filing attorney to all of the draft filings in the bulk.

Note: All fields provided in the examples and steps listed here may not be displayed for all users.

3. For each draft filing, select the party responsible for fees from the Party Responsible for Fees drop-

down list. Click

if you want to search for a party.

Select Party Responsible For Fees							
First Name	Last Name	Entity	Party Type Select	¢ FILT	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 18.23 – Select Party Responsible For Fees Window

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

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

=- 🐝 EFILE QA 01 Bulk Fees / Summary					<b>?</b> -	<b>.</b> -	<b></b> -	<b>.</b>
Bulk # 157 - Sports Cases								
After filling in the required fields, click on "CALCULATE FEES	at the bottom of the page. To view t	the fee details	on individual drafts, click on "FEE DETAILS".					
oply Payment Account to All Drafts Lauren's Waiver \$	APPLY TO ALL*		Apply Filing Attorney to All Drafts Perry Mason	•	API	PLY TO ALL		
Payment accounts may be restricted at some locations								
Draft # 992								
Location OFS QA 2017	Case Case Civil	egory		Case Type Negligence				
Payment Account *			Party Responsible for Fees		_	_		
Lauren's Waiver		\$	Joseph Defendant	\$	SEAF	CH		
Filing Attorney 🚯 \star			Filer Type					
Perry Mason		٠	Default			÷		
Draft # 993								
Location OFS QA 2017	Case Cate Civil	egory		Case Type Malpractice				
Payment Account *			Party Responsible for Fees					
Lauren's Waiver		٠	George Doctor MD	•	SEAF	CH		
Filing Attorney 🕄 🛪			Filer Type					
Perry Mason		•	Default			٠		
← BULK DASHBOARD SAVE DRAFT AND EXIT								CALCULATE FEES SUMMARY →

Figure 18.24 – Sample Bulk Fees / Summary Page—Completed Fields

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



The Fee Details button is displayed.



6. Click

The *Fee Details* window is displayed.

ee Details	
1 Fraud	^
Case Initiation Fee	\$10.00
	Subtotal \$10.00
Service Fees	^
Total Service Fees	\$1.00
Convenience Fee Total Court Service Fees	\$1.00 \$1.00
	Subtotal \$3.00
	Grand Total \$13.
	CLOSE

Figure 18.25 – Sample Fee Details Window

7. Review the filing fees, and then click

SUMMARY ->

# Viewing the Envelope Summary for a Bulk Filing

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

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

#### To view the envelope summary for a bulk filing:

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

SUMMARY 🗲

The Bulk Fees / Summary page is displayed.

SUBMIT

			<b>8-</b>	<b>.</b>	•	-
Bulk # 157 - Sports Cases						
OFS QA 2017						
Submission Agreements	4 . F. F.					
You must accept the Submission Agreements.	s tor E+tiling					
Draft # 992						
Location OFS QA 2017	Case Category Civil	Case Type Negligence				
Draft # 993						
OFS QA 2017	Case Category Civil	Case Type Malpractice				
FEES SAVE DRAFT AND EXIT						SUBMIT

Figure 18.26 – 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		Q.	⊕- Ⅲ- ೭
Bulk # 157 - Sports Cases		Bulk subr	mission is complete. BULK HISTORY DASHBOARD
OFS QA 2017			
Draft # 992			•
OFS QA 2017	Case Category Civil	Case Type Negligence	
Draft # 993			0
Location OFS QA 2017	Cise Category Civil	Case Type Malpractice	
← FEES SAVE DRAFT AND EXIT			SUBMIT

Figure 18.27 – 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 18.28 – 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 18.29 – 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 18.30 – 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 18.31 – 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> -	<b>.</b> .
Drafts Add Filings Save Filings								
Filings								
Filing Code	Filing Type eFile Only		Filing Description		Client Ref	t		
Draft # 992 Losson OFS QA 2017		Case Category Civil		Case Type Negligence				
Draft # 993 Location OFS QA 2017		Case Category Civil		Case Type Malpractice				
← ADD FILINGS								SAVE



10. On the Save Filings tab, click

c	Δ1		
3	А	v	с.

The Associate Parties button is displayed for each filing.

=- 🐝 EFILE QA 01 Bulk Add Filings					<b>?</b> -	<b>.</b>	<b></b> -	•
Drafts Add Filings Save Filings								
Filings								
Filing Code Acknowledgement	Filing Type eFile Only		Filing Description		Client Ref	*		
Draft # 992 Location OFS QA 2017 ASSOCIATE PARTIES		Case Category Civil		Case Type Negligence				٥
Draft # 993 Location OFS QA 2017 ASSOCIATE PARTIES		Case Category Civil		Case Type Malpractice				O
								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 18.34 – Select Filings Window

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

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

SELECT ALL

Associate F	Parties to selec	ted Filing(s)				
First Name	Last Name	Entity	Party Type Select	\$	FILTER	RESET
Select	Party Name			Party Type		
	Jane Doe			Defendant		
	John Doe			Plaintiff		
Previous 1	Next				2 R	esult(s) Page 1 of 1
					CANG	CEL SAVE

Figure 18.35 – 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	4
3rd Party Defendant	
3rd Party Plaintiff	
4th Party Defendant	
Ad Litem	1
Administrator	
Affiant	
Agent	
Appellant	
Appellee	
Applicant	
Assault Victims	
Attorney	
Attorney Ad Litem	
Attorney General	
Bank	
Bondsman	
Child Victims Of Physical Abuse	
City	
Civil Defendant	-

FILTER

Figure 18.36 – 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:

1. On the *Dashboard* page, click

\_\_\_\_\_

START FILING

The Start Filing page is displayed.

= 🎪 FFILE QA 01 Start Filing	8-	<b>-</b>	<b></b> -	<b>≜</b>
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Loaton * Select				
Location is Required.				
← DASHBOARD				
k,				
				O Help

Figure 18.37 – 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 18.38 – 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 18.39 – 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 18.40 – 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:

re eliek

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 18.42 – 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 18.44 – 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 18.45 – Sample Bulk Filing Dashboard Page

5. In the Quick Actions pane, click

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

BOOKMARKS SEARCH

Bookmarks Add to B	ulk			
Select	Case Number	Description		FILTER RESET
Case #CC-20-360	0 Tim Thompsonv.Laura and Associates	s		
Case #CC-21-006	a av.Ben Benson			
Case #CC-21-116 Location OFS QA 2017	Andrea Thompsonv.ABC Consultants			
Case #CC-21-117 Location OFS QA 2017	Naomi Watson v. Helena Carter			
Case #CV-2020-1 Jane Doe vs John	2785940 Smith vs Jane2 Doe2 vs Jane3 Doe3 vs J	lane4 Doe4 vs Jane5 Doe5 vs Ja	ne6 Doe6 vs Jane7 Doe7 vs Jane	e8 Doe vs Jane9 Doe vs Jane10 Doe vs
Previous 1 Next				5 Result(s) Page 1 of 1
				CANCEL PROCEED

Figure 18.46 – Sample Bookmarks Window

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

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

PROCEED

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-21-11	85	Case Category Civil		Case Type Malpractice	
Quick Actions	Filing Code	Filing Type		Filing Description	Clie	nt Ref #
BULK ADD FILINGS	Acknowledgement	eFile Only				
Find Cases		~ .				
CASE SEARCH	Case # CC-21-11	84				
BOOKMARKS SEARCH	OFS QA 2017		Case Category Civil		Case Type Negligence	
FILING HISTORY SEARCH	Filing Code	Filing Type		Filing Description	Clie	nt Ref #
	Acknowledgement	eFile Only				
						2 draft

Figure 18.48 – 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 18.49 – 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 Name	Bulk Filing		×
	Bulk Name		
CANCEL CONTINUE		CANCEL	CONTINUE

Figure 18.51 – Bulk Filing Window

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

The Bulk Filing Dashboard page is displayed.

=- 🐝 EFILE QA 01 Bulk Filing Dashboard	0- ⊕- Ⅲ- ≛
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you may do so.	Bulk # 158 - Texas
Quick Actions BULK ADD FILINGS	
Find Cases CASE SEARCH	
BOOKMARKS SEARCH FILING HISTORY SEARCH	
SAVE DRAFT AND EXIT	FEES→

CASE SEARCH

CONTINUE

Figure 18.52 – 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

Figure 18.53 – 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 18.54 – 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 18.56 – Case Search Message—No Cases Selected

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

ADD TO BULK		DONE	
	. and then click	_	

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

=- 🐝 EFILE QA 01 Bulk Filing Dashboard					?-	••	<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	1
		,						2 draft(s).
SAVE DRAFT AND EXIT								FEES >

Figure 18.57 – 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.

= 🎪 EFILE QA 01 Start Filing	<b>?</b> -	<b>.</b>	<b></b> -	<b>≜</b> manual constant
Select Filing Location				
Select your filing location to see which types of filings are allowed at that location.				
Select +				
Location is Required.				
← DASHBOARD				
l≯				
				O Help

Figure 18.58 – Start Filing Page

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

The New Case and Existing Case panes are displayed.

EFILE 0A 01 Start Filing	<b>∂</b> - ⊕- <b>Ⅲ</b> - <b>≜</b>
Select Filing Location Please select your location below.	
Location # OFS QA 2017 ÷	ß
New Case	Existing Case
If you want to start a case against someone, click Start a New Case	Do you have a case number and are ready to file into it?
START A NEW CASE	FILE INTO EXISTING CASE
Firm - You can initiate bulk filing.	Firm - You can bulk file into multiple cases.
START MULTIPLE NEW CASES	FILE INTO MULTIPLE EXISTING CASES
←DASHBOARD	

Figure 18.59 – Start Filing Page—Bulk Filing Supported

	FILE INTO MULTIPLE EXISTING CASES	1
3. Click		

The Bulk Filing window is displayed.

Bulk Filing		×
Bulk Name		
	CANCEL	CONTINUE
	_	

Figure 18.60 – 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 18.61 – Sample Bulk Filing Dashboard Page

5. In the Quick Actions pane, click

The Filing History window is displayed.

ed By	Location	Case Number	
y Filings	Select	Case Number	
y rinngs	* Select	•	
Range	From Date	To Date	F
nytime	•	titi i	
			FILTER RESE
Case #CR-21-009876			
Location	Case Category	Case Type	
OFS QA 2017	Criminal	Adult Misdemeanor	
Case #CC-21-117 Naomi Watson	Case Category Civil	Case Type Appeal	
¬			
Case #CC-21-322 a av.b b	Case Category	Case Type	
OFS QA 2017	Civil	Breach Of Contract	
Case #CC-21-084			
Location	Case Category	Case Type	
OFS QA 2018	Family	Divorce W/ Parent Child Relationship	
Case #CC-20-2703 ABCD Associa	atesv.DEF Company		
Location	Case Category	Case Type	
OFS QA 2017	Civil	Breach Of Contract	
revious 1 2 3 4 5 6 7 8 9	10 11 12 13 Next		63 Result(s) Page 1

Figure 18.62 – Sample Filing History Window

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

The Add to Bulk window is displayed.

ase #CC-21-117			
aomi Watson v. Helena Carter			
cation	Case Category	Case Type	
FS QA 2017	Civil	Appeal	

PROCEED

Note: If your bulk filing is not displayed in the *Filing History* window, you can search for the bulk filing that you want. First, select the filings that you want to display (your filings or the firm's filings) from the Created By drop-down list. Then, select the location from the Location drop-down list. Next, type the case number in the Case Number field, and then select the date range

for the filings you want to display. Then, click

F	ILI	ER	

Figure 18.63 – Add to Bulk Window



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

To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action	Bulk # 175 - Sports	Cases				2 draft(
below. 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	C	ient 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	C	ient Ref #
	Acknowledgement	eFile Only				
						2 draft

Figure 18.64 – 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.

Draft # 817	7				Γ
	2021 5:21 PM on behalf of Jack Stone by Lau	ren Groswald			L
Location	2021 3.211 Won benañ of Sack Stone by Lat	ien oroswaid			
OFS QA 2017					
Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Draft	Acknowledgement	Efile			
Draft	Abstract Of Judgment	Efile			
Draft # 818	2				Γ
	-				
Draft # 818 Started 04/14/ Location	2021 5:24 PM on behalf of Jack Stone by Lau	ren Groswald			
A CARGO AND A C					

Figure 18.65 – Sample Bulk Filing Pane

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

=- 🐝 EFILE QA 01 Bulk Filing Dashboard				<b>0</b> - ⊕- Ⅲ-	-
To add the same filing code(s) and document(s) to all the drafts in this bulk, click on Quick Action below. If you wish to edit or add details to a specific draft, you	Bulk # 157 - Sports	Cases			2 draft(s).
If you wish to edit or add details to a specific draft, you may do so.	Draft # 992				• • •
Quick Actions	OFS QA 2017	Case Category Civil		Case Type Negligence	
BULK ADD FILINGS	Filing Code	Filing Type	Filing Description	Client Ref #	
ADD DRAFT	Acknowledgement Acknowledgement	eFile Only eFile Only			
	Draft # 993				
	OFS QA 2017	Case Category Civil		Case Type Malpractice	
	Filing Code	Filing Type	Filing Description	Client Ref #	
	Acknowledgement	eFile and Serve			
	Acknowledgement	eFile Only			
					2 draft(s).
SAVE DRAFT AND EXIT					FEES >

Figure 18.66 – Sample Bulk Filing Dashboard

4. Continue with your filing.

# **19** 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 Firm Administrator actions.

Ð	Dashboard
Q	Case Search
≣	Filing History
(A)	Filing Drafts
≣	Bulk History
(A)	Bulk Drafts
	Bookmarks
	Templates
$\succ$	Vacation Letter
***	Firm Users
	Firm Attorneys
	Firm Payment Accounts
0	Firm Details
B	Firm Service Contacts
¢	Reports

Figure 19.1 – Dashboard

From here, you can perform the following actions:

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

- Access the *Filing History* page to view a list of your or your firm's case filings. For subsequent bulk filings, you can also add cases from the *Filing History* page.
- Access the *Filing Drafts* page to view a list of your or your firm's draft filings.
- Access the *Bulk History* page to view a list of your or your firm's bulk filings.
- Access the Bulk Drafts page to view a list of your or your firm's bulk draft filings.
- Access the *Bookmarks* page to view a list of cases that you have bookmarked for quick access.
- Access the *Templates* page to locate an existing template and quickly begin a new case filing.
- Access the *File Vacation Letter* page to create a filing in which you upload a vacation letter (or leave of absence).
- Access the Firm Users page to add and remove firm users.
- Access the Firm Attorneys page to add and remove firm attorneys.
- Access the Firm Payment Accounts page to set up and manage the firm payment accounts.
- View and update your firm information on the *Firm Details* page.
- · Access the Firm Service Contacts page to add and manage the firm's service contacts list.
- Access the *Reports* page to generate reports for envelopes and filings that you or your firm submitted.

### **Bulk History**

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

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

=- 🐝 EFILE QA 01 - EFM QA4 B.	ulk History				<b>0</b> - ⊕-	<b>Ⅲ· ≜</b> талт польсов -
Filing History Filter	FILING HISTORY FILING DI	RAFTS BULK HISTORY BULK DRAFTS				6 Result(s) Page 1 of 2
Created By	Bulk # 262 - Ja	ne's Law Firm				
My Filings	Bulk # 262 Started 06/29/2021 4:33	PM by Lauren Groswald				
Bulk Number / Name	Case # CC-2	1-1185				6
Bulk Number	*******					
Bulk Name	Location	/30/2021 2:06 PM on behalf of Perry Mason by Laure	n Groswald			
Status	OFS QA 2017					
All Statuses     Accepted     Cancelled	Filing Status Submitted	Filing Code Notice - Auto Accept	Filing Type Efile	Filing Description	Client Ref #	8
Receipted     Served     Returned     Submitted     Submitting		1-1184 v30/2021 2:06 PM on behalf of Perry Mason by Leure	n Grosweld			B
Location	OFS QA 2017					
Any Location	Filing Status	Filing Code	Filing Type	Filing Description	Client Ref #	
Case / Envelope Number	Submitted	Notice - Auto Accept	Efile			8
Case Number	Bulk # 250 - Jo	nes Law Firm				
Envelope Number	Bulk # 250 Started 06/24/2021 10:20					
Date Range	Case # CC-2	1-1185				В
Anytime     RESET     FILTER	******	(24/2021 10:21 AM on behalf of Jack Store by Lawre	- Our weld			Ø Help

Figure 19.2 – Sample Bulk History Page

## **Bulk Drafts**

The Bulk Drafts page includes the drafts of your and your firm's vacation letter (or leave of absence) filings.

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

=- 🀝 EFILE QA 01 - EFM QA4 8	Bulk Drafts			<b>6</b> -	<b>⊕</b> . ∎.	±
Bulk Drafts Filter	FILING HISTORY FILING DRAFTS BULK HISTORY	BULK DRAFTS				14 Result(s) Page 1 of 5
Created By	Bulk # 270 - Jones Law Firm	า				
<ul> <li>My Filings</li> <li>My Firm</li> </ul>	Bulk # 270 Started 06/30/2021 2:16 PM by Lauren Groswald					
Bulk Number / Name	Case # CC-21-1185					
Bulk Number	*****					
Bulk Name	Draft # 3440 Started 06/30/2021 2:16 PM by Lauren Groswald Location					
Location	OFS QA 2017					
Any Location	Filing Code     Notice - Auto Accept	Filing Type Efile	Filing Description		Client Ref #	
Case / Draft Number	Notice - Auto Accept	Elle				
Case Number	Case # CC-21-1184					
Draft Number	Draft # 3441 Started 06/30/2021 2:16 PM by Lauren Groswald					
Date Range	Location OFS 0A 2017					
Anytime	013082017					
Last Month     Last Week	Filing Code	Filing Type	Filing Description		Client Ref #	
O Last Two Days	Notice - Auto Accept	Efile				
○ Today						
O Pick a Custom Range	_ Bulk # 239 - Chicago Law Fi	rm				1
From Date	Bulk # 239 Started 06/23/2021 5:24 PM by Lauren Groswald					
To Date	Case # CC-21-1185					
	******					
RESET FILTER	Draft # 3186 Started 06/23/2021 5:24 PM by Lauren Groswald		N2.			D Help
		© 2021 Tyler Technologies, Inc.	All Rights Reserved   Version: 0.0.0.1859			VA DEPARTURE OF

Figure 19.3 – 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.

=- 🌼 EFILE QA 01 - EFM QA4 Dashboard		<b>0</b> - ⊕- Ⅲ- <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 Draft # 874 Started at 04/26/2021 12:58 PM Draft # 873 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
		() Help

Figure 19.4 – 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.

<b>⊙</b> · ⊕ · <b>Ⅲ</b> · <b>≜</b>
Vacation Letter Filing Name
NEXT

Figure 19.5 – Options Tab on the File Vacation Letter Page

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

Vacation Letter Type 🖊	
Select	¢
Select LEAVE OF ABSENCE MORE THAN 30 DAYS	
LEAVE OF ABSENCE LESS THAN 30 DAYS	

Figure 19.6 – 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 19.7 – 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			
OFS QA 2017	Civil	Negligence			
Previous 1 Next					2 Result(s) Page 1 of 1
PREVIOUS					NEXT

Figure 19.8 – 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	1
to select all of your cases, click		
-		

FILTER

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

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	3	- (	)- III-	A 1999 11100 1100
Options Cases Filing Save				
Filing Type #				
eFile Only +				
Filing Description Client Reference Num	er			
Comments to Court 🕑				
add comment here				
Document * Choose File No file chosen				
Document is required.				
Maximum Filesize: 50.00 MB Supported File Types: MPE0 (MPE0) 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 19.9 – 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 19.10 – 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 Filing D	ashboard			<b>0</b> - <b>+</b> -	<b></b>
Bulk # 250 - Jones Law Fir	m				
This is test content for vacation letter.					
					2 draft(s).
Case # CC-21-1185					
OFS QA 2017		Case Category Civil		Case Type Malpractice	
Filing Code	Filing Type		Filing Description	Client Ref #	
Notice - Auto Accept	eFile Only				
Case # CC-21-1184					
Location		Case Category		Case Type	
OFS 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 19.11 – 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 anot	her 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			054000		
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 19.12 – 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.

ESO-FS-220-4496 v.15

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>	•	2 maar
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	ee details on individual	drafts, click on "FEE DETAILS".					
Apply Payment Account to All Drafts	1001//70 1114		Apply Filing Attorney to All Drafts			APPLY TO		
Lauren's Waiver \$	APPLY TO ALL*		Perry Mason		\$		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						
Lauren's Waiver	\$	Select		:	•	SEARCH		
Filing Attorney 🚺 *		Filer Type						
Perry Mason	•	Select						•
Case # CC-21-1184								
OFS QA 2017	Case Category Civil			Case Type Negligence				
Payment Account *		Party Responsible for Fees						
Lauren's Waiver	\$	Select		1	•	SEARCH		
Filing Attorney 🚺 *		Filer Type						
Perry Mason	¢	Select						•
← BULK DASHBOARD SAVE DRAFT AND EXIT								CALCULATE FEES SUMMARY →
							_	
								Q Help
					_			2. neip

Figure 19.13 – 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				<b>3</b> -	<b>.</b>	•	
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	e fee details on individual	drafts, click on "FEE DETAILS".				
ply Payment Account to All Drafts Lauren's Waiver	APPLY TO ALL*		Apply Filing Attorney to All Drafts Perry Mason	\$	APPLY TO	ALL	
Payment accounts may be restricted at some locations							
Case # CC-21-1185	Case Category Civil	Party Responsible for Fees Select		Case Type Malpractice	SEARCH		
Perry Mason Total \$0.00	• FEE DETAILS	Filer Type Select					÷ 🔍
Case # CC-21-1184	Case Category Civil			Case Type Negligence			
Payment Account *	:	Party Responsible for Fees Select		•	SEARCH		
Filing Attorney <b>① *</b> Perry Mason	•	Filer Type Select					•
Total \$0.00	FEE DETAILS						
C BULK DASHBOARD SAVE DRAFT AND EXIT			N			C	ALCULATE FEES SUMMARY ->
			3				D Help

Figure 19.14 – 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

ET EFILE QA 01 - EFM QA4 Bulk Fees / Sum	nmary	<b>9</b> - (	)· III·	
ulk # 262 - Jane's Law Firm	n			
OFS QA 2017				
Submission Agreements	Rules for E-Filing			
Case # CC-21-1185				
	Case Category	Case Type Malpractice		
	Civil			
ocation DFS QA 2017 Case # CC-21-1184	Civil			

Figure 19.15 – 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 or a member of your firm submitted. The report is available in a Microsoft Excel spreadsheet that you can download.

## **Creating a Report**

#### To run a report:

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

#### The *Reports* page is displayed.

EFILE QA 01 Reports			<b>?</b> -	<b>.</b>	<b></b> -	<b>1</b>	-
Reports							
Useful when reconciling financial transactions	against envelopes submitted during a selectable time frame up to 60 da	ays. * Provides envelope and filing level information specific to fees. * Deliver	red in an Excel spre	radsheet to al	low for filterin	g and searching.	
Created By My Filings My Firm	All SELECT						
Status All Statuses Accepted	Reviewed	Date From 🖈	ė	Date To ≭			ä
Cancelled Receipted	Served Submission Failed	Date From is Required.		Date To	is Required	l.	
Returned	Submitted					CANCEL	DOWNLOAD REPORT

Figure 20.1 – Reports Page

- 2. Select the appropriate option for the report, either My Filings or My Firm.
- 3. Select the statuses that you want to include in the report.



4. Click

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

The Select Locations dialog box is displayed.

Select All   System  System System System  System System System System System System System System System System System System System System System System System Sys	
Figure 20.2 – Select Locations Dialog Box 5. Select the locations that you want to include in the report, and then click	
6. 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  Date To <b>*</b> 05/20/2020	Ħ
Date range cannot exceed 60 days.	
CANCEL DOWNLOAD REP	ORT

×

Figure 20.3 – Error Message for Report Date Range

DOWNLOAD REPORT

7. Click

Select Locations

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

# 21 Support and Feedback

#### Topics covered in this chapter

- 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 **Help** drop-down menu is displayed.



Figure 21.1 – Help Drop-Down Menu

2. Click Support.

The Support window is displayed.

Note: Your screen may vary from the example provided.

Support	×
Self Service Support Contact Technical Support	
	CLOSE

Figure 21.2 – Example of a Support Window

3. Click the support link that you want.

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



## 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 0A 2018	CC-19-2373 - Drina Colin v. McDonald Associates LLC OFS 0A 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
		() Help

Figure 21.3 – Help Icon on the Dashboard Page

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

Odyssey File and Serve Cloud
Odyssey File and Serve Cloud + Bot Hil Welcome to Odyssey File and Serve Cloud.
Ask me a question and I'll find the answer for you.
Get in touch
Type your question here

Figure 21.4 – 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.

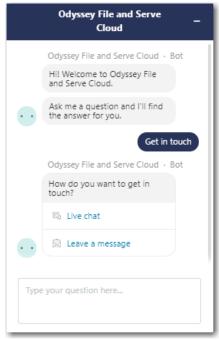


Figure 21.5 – Chat Modal with Communication Options

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:



in the eFile header.

The Help drop-down menu is displayed.



Figure 21.6 – Help Drop-Down Menu

2. Click Feedback.

The *Feedback* window is displayed.

Feedback	×
Feedback Type * Select	÷
Feedback Type is Required.	
Feedback *	
Feedback is Required.	
It is ok to contact me about this feedback SUBMIT FEEDBACK	
	CLOSE

Figure 21.7 – Feedback Window

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

Feedback Type \star	
Feedback	÷,,
Select	×
Feedback	
Suggestion Other	
Other	

Figure 21.8 – 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.