Firm Administrator User Guide

Odyssey® File & Serve™ 2022.2, 2022.3, 2022.4, and 2022.5

ESO-FS-220-4496 v.18

June 2022

Copyright and Confidentiality

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: • Added sections for templates, bookmarks, and the Redaction feature. • Added a procedure for non-indexed subsequent filing. • Added a procedure for entering case information for a civil case. • Added a procedure for entering case cross references to a filing. • Added a procedure for entering a filing with a motion type code. • Added a section for client support and feedback. • Updated the description and screen shots of the Dashboard and the drop-down menu for filer actions. • Updated screen shots throughout the document to reflect minor software changes.
OFS-FS-220-4496 v.3	Third	February 2020	The following changes were made: • Added a procedure for filing a new case with a Will Filed date. • Added a procedure for entering the date of death on the *Parties* page.

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

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

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

Document Publication Number	Revision	Date	Changes Made
			• Added the vacation letter (or leave of absence) feature • Added the capability to collect additional data on the *Case Information* page. The data that is collected is then transferred to forms used in civil and family cases. • Added the Service of Process feature. The data that is collected is then transferred to forms used in civil and family cases. • Updated the case search sections to include the use of the ENTER button for case searches
ESO-FS-220-4496 v.13	Thirteenth	October 2021	The following changes were made: • The *Fees* page has been updated to allow filers to create payment accounts on the *Fees* page during filing creation. • The **Documents** tab has been changed to the **Preload Documents** tab. • The Upload Documents pane on the *Filings* page has been changed to the Documents pane. The **Add Documents** button in the Documents pane has been changed to the **Select Documents** button. • The *Envelope Submitting* window has been added at the end of the filing process. After filers click the **Submit** button, the *Envelope Submitting* window is displayed with three options for the filer's next step. The options include the following: return to the *Dashboard* page, view the receipt, or start a new envelope.
ESO-FS-220-4496 v.14	Fourteenth	November 2021	The following changes were made:

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

Document Publication Number	Revision	Date	Changes Made
			• Revised the "Signing Out" section • Removed **Account Settings** from the Dashboard menu. Also removed the **Account Settings** description from the "Orientation" section. • Added a chapter to describe how to access re: Search from Odyssey File & Serve
ESO-FS-220-4496 v.16	Sixteenth	December 2021	The following changes were made: • Removed the *Preload Documents* page and replaced all screen shots where the **Preload Documents** tab was previously displayed • Replaced the *Start Filing* page throughout the document, reflecting the removal of the **Location** drop-down list • On the *Filings* page, changed the Documents pane to the Upload Documents pane. Also changed "Component" to "Type" in the Upload Documents pane headers • Replaced screen shots to reflect the new page headers for the following pages: – Firm Users – Attorneys – Payment Accounts – Firm Details – Change Password – Profile – Email Notifications • Reordered some of the sections in the "Case Information" chapter

Document Publication Number	Revision	Date	Changes Made
			• Removed the "Uploading Documents for a New Case Filing" section • Removed the "Uploading Documents for a Bulk Filing" section • Removed the Unused Documents message from the *Summary* page
ESO-FS-220-4496 v.17	Seven-teenth	January 2022	The following changes were made: • Changed the *Start Filing* page throughout the document • Added information on creating draw-down accounts • Updated the "Payment Accounts" chapter to reflect the change to the payment account pane for adding new payment accounts • Added draw-down accounts to the account types listed for creating new payment accounts on the *Fees* page • Added a topic describing how to reset a firm user's password • Added envelope-level information to the *Case Information* page, the *Summary* page, and the envelope details • Updated the "File into an Existing Case" chapter • Removed the topic "Filing into an Existing Case from the Case Search Page" and included the information in other topics • Updated screen shots throughout the document to reflect the addition of the **Filter** option on the following pages: – Attorneys – Users

Document Publication Number	Revision	Date	Changes Made
			– Templates • Updated screen shots in the specified chapters to reflect the changes to the following buttons: – Add Attorney – Add Payment Account – Add User • Changed the example screen shot of the public service contacts list to show the addition of the firm name associated with each service contact
ESO-FS-220-4496 v.18	Eighteenth	June 2022	The following changes were made: • Updated all screen shots to reflect the new user interface • Revised steps in applicable sections to reflect changes to the filing flow • Added information about adding the current filer as a service contact in a case filing • Added information on the Merge Document feature • Added a note to the topic “Removing a User from the Firm” stating that signed-in users cannot delete themselves from the firm list

Contents

List of Figures

About This Guide

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

User guides may include the following elements:

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

Audience

This document is intended for the following personas:

- Clients
- Tyler Client Services

Documentation Conventions

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

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

Documentation Notes

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

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

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1 System Overview

Topics covered in this chapter

The Odyssey® File & Serve™ application 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.

Capabilities

The File & Serve functionality allows filers to do the following:

- Create and submit filings at any time
- Check the status of draft filings, as well as filings that are stored in the filing history
- Search for a case that was previously submitted
- File into an existing case to create a subsequent filing
- Bookmark a case to return to it at a later time
- Create and save a template that you can use to quickly create future filings
- Create and store payment accounts for use in your future filings
- Create and manage service contacts for use in your future filings
- Generate reports for a specified time frame and export them to a Microsoft Excel file, which you can then download

Release 2022.2, 2022.3, 2022.4, and 2022.5 Enhancements

The following enhancements have been made to File & Serve for Release 2022.2, 2022.3, 2022.4, and 2022.5.

Feature/Update	Description/Location in Document
The user interface for File & Serve has been changed.	Throughout the document, all screen shots for the application have been replaced.
The filing flow has been changed to improve the user experience when the user is creating a case filing.	Throughout the document, the steps in procedures have been changed to reflect changes in the filing flow.
The ability to add the current filer as a service contact in a case filing has been added.	Adding Yourself as a Service Contact to a Filing, page 172

Feature/Update	Description/Location in Document
The Merge Document feature has been added.	Merging Documents for File Upload in a Case Filing, page 86
The ability for signed-in users to delete themselves from the firm list has been removed.	Removing a User from the Firm, page 46

2 Before You Begin

Topics covered in this chapter

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 use 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 and Recommendations

The system requirements and recommendations are as follows:

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

  Note: Internet Explorer® is not a supported browser and may not work as expected.
- Operating Systems—The system supports Microsoft® Windows®, Linux®, Chrome OS™, Android™, iOS, and OS X® desktop class operating system software.
- Minimum Hardware Requirements—The system supports the following hardware:
  - Intel® Core™ Duo processors or Advanced Micro Devices, Inc. (AMD) processors manufactured in 2012 or later
  - 2 gigabytes (GB) of random-access memory (RAM)
  - 1366 x 768 resolution screens for desktop computers, or 1280 x 720 resolution screens for mobile devices
- Recommended Hardware—Tyler recommends the following hardware:
  - Intel® Core™ i3 or AMD A6 processors with at least a 2.0 GHz clock speed
  - 4 GB of RAM
  - 1920 x 1080 resolution for both desktop computers and mobile devices
- Connection Recommendation—A high-speed Internet connection is recommended.
- Document Format—The following document formats are supported:
  - Adobe® PDF
  - Adobe TIFF

- – Microsoft Windows Media Video (WMV)
- – Microsoft Word (DOCX, DOC)
- – MPEG (MPG)
- – WordPerfect® (WPD)
- – XML

Page Navigation

This section describes how to navigate through File & Serve 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 list.

To access keyboard shortcuts:

1. Click  in the eFile header.

   The **Help** drop-down list is displayed.

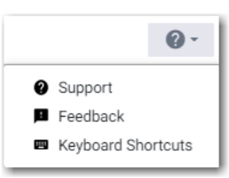


Figure 2.1 – Help Drop-Down List

2. Click **Keyboard Shortcuts**.

   The *Keyboard Shortcuts* window is displayed.

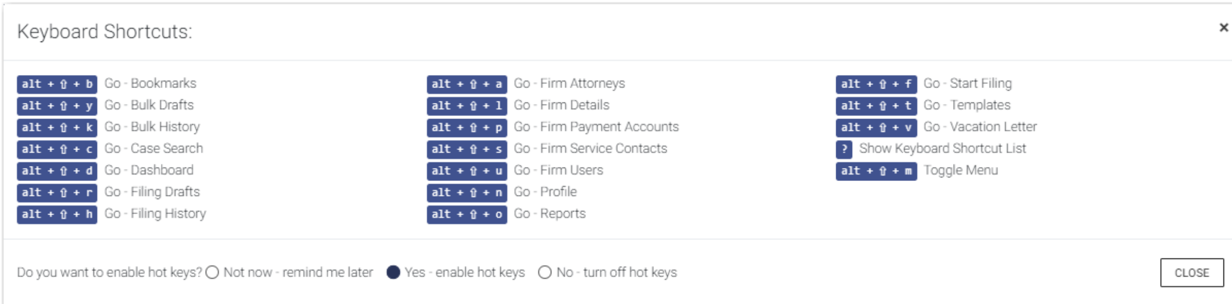


Figure 2.2 – Keyboard Shortcuts Window

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

Drop-Down Lists

The application allows you to search and filter various drop-down lists 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 lists:

- **Court Location** field on the *Case Information* page
- **Location** field on the *Case Search* 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: The Filing Attorney field may not be available for some users.

Error Messages

File & Serve 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 File & Serve, the *Dashboard* page is displayed. From here, you can select various filing options.

Dashboard Page

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

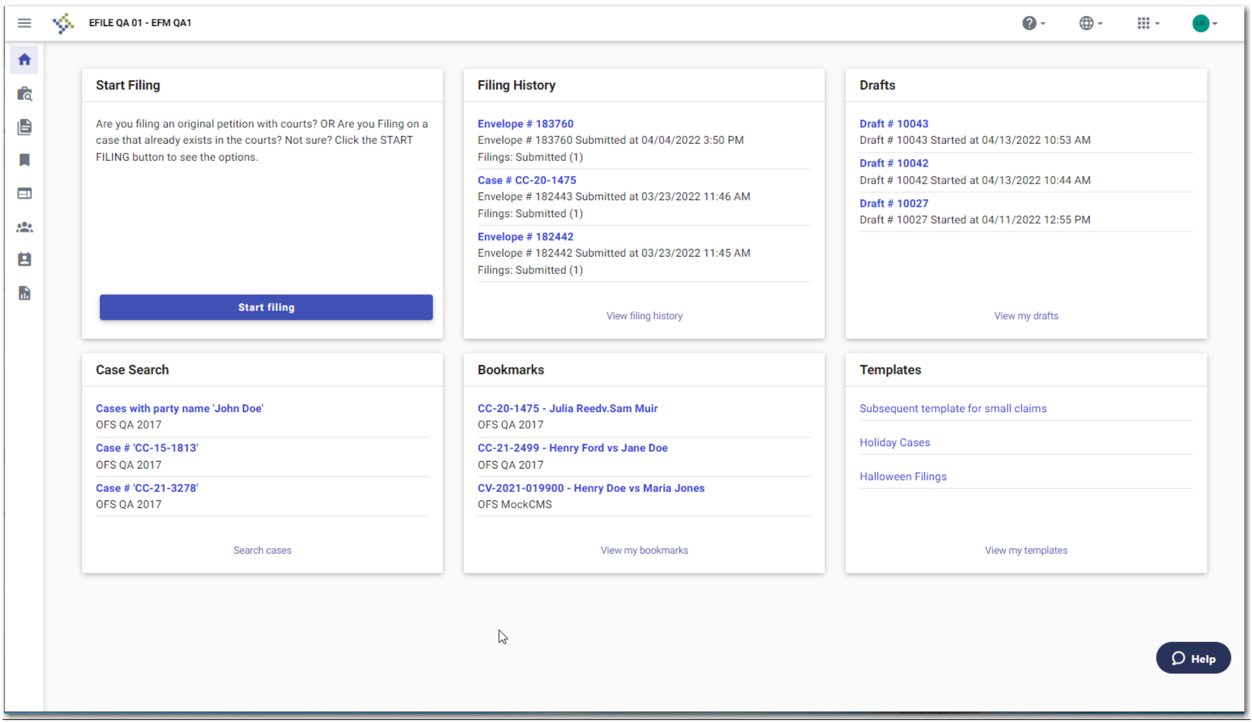


Figure 2.3 – Dashboard Page

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.

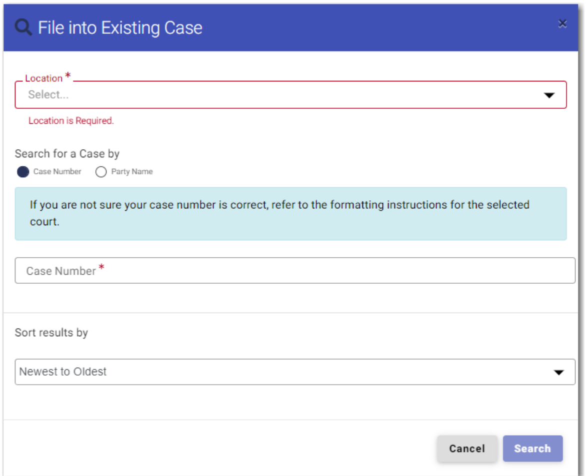
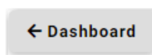


Figure 2.4 – Example of a File into Existing Case Window

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

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

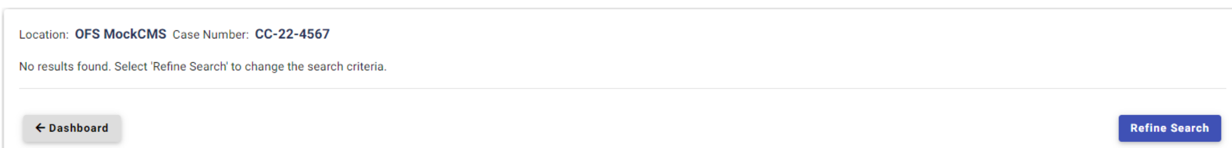


Figure 2.5 – Case Search Page with No Search Results Displayed

Filing History

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

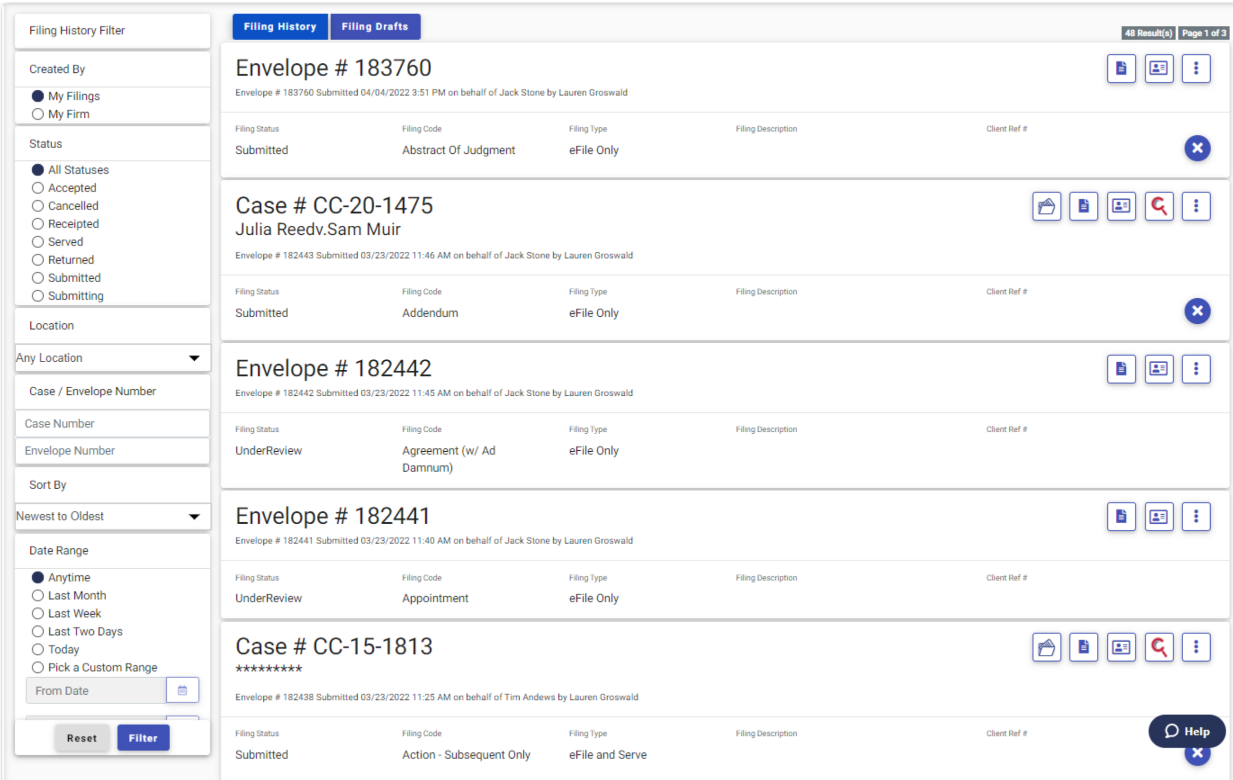


Figure 2.6 – Filing History Page

Filing Drafts

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

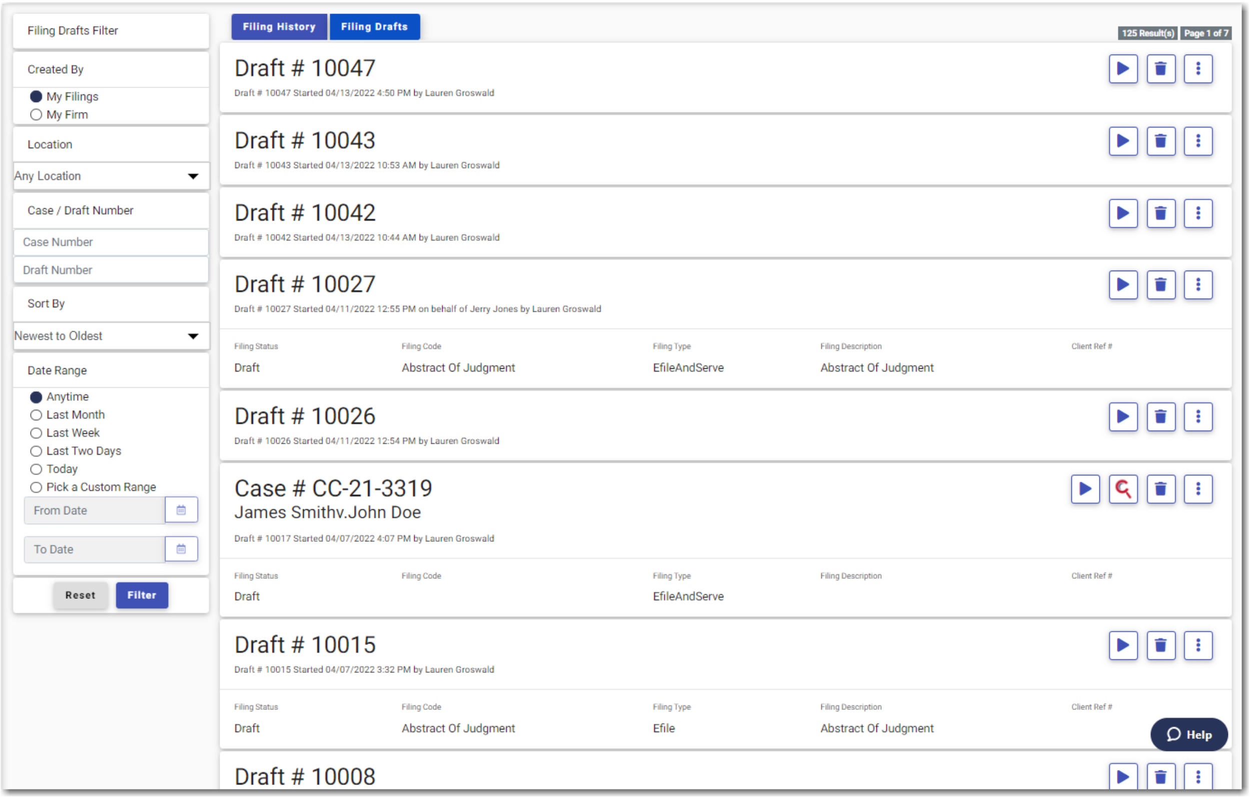


Figure 2.7 – Filing Drafts Page

Bookmarks

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

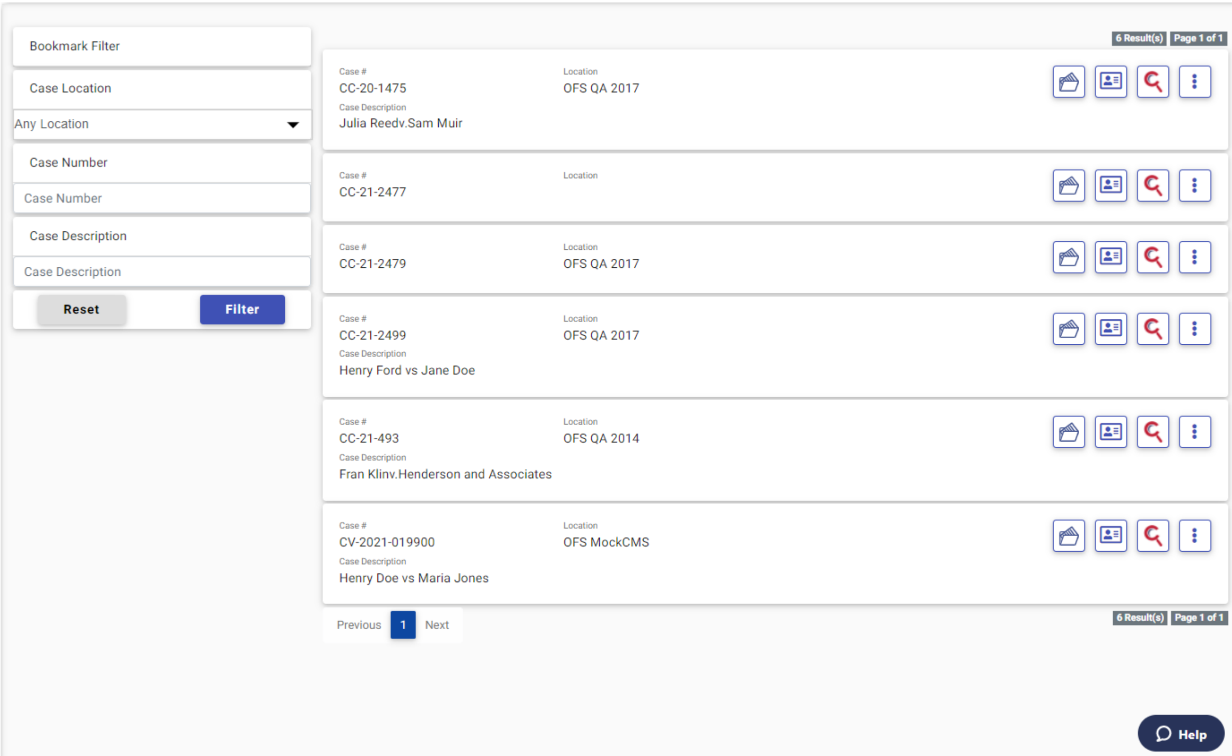


Figure 2.8 – Example of a Bookmarks Page

Templates

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

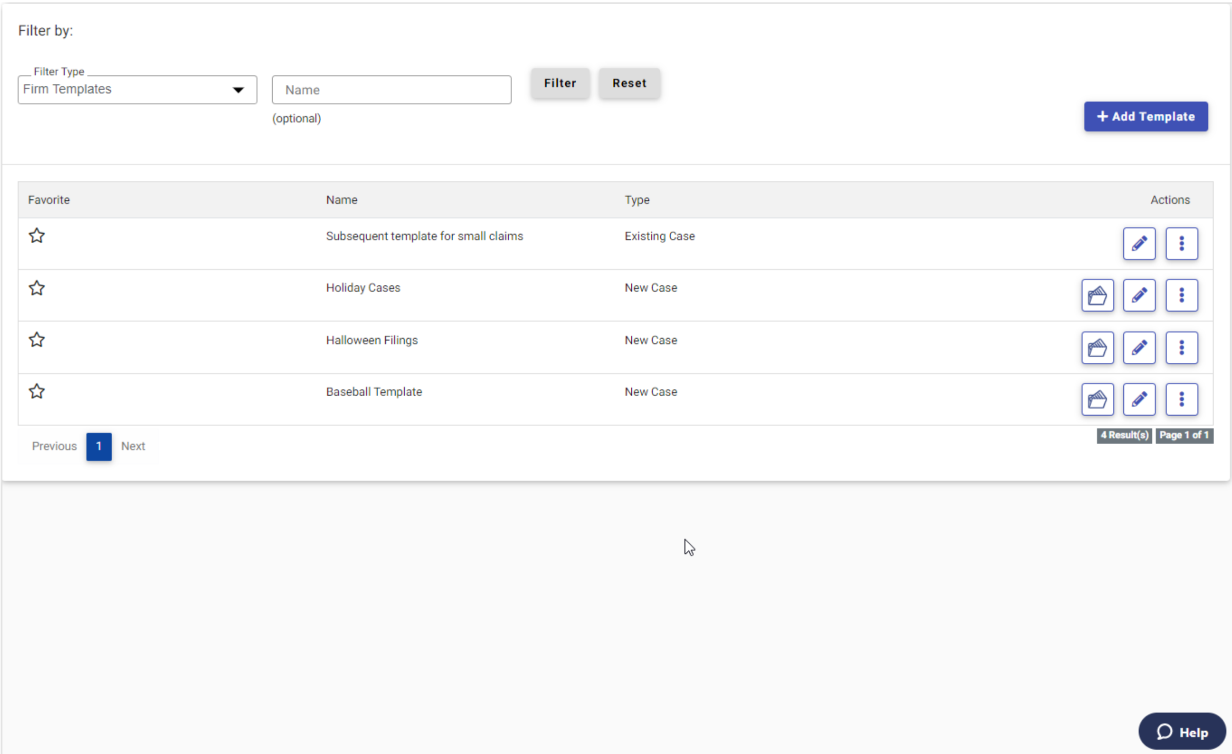


Figure 2.9 – Templates Page

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 (or to specified users), and you can remove the role of Firm Administrator from a user to whom you previously assigned the role.

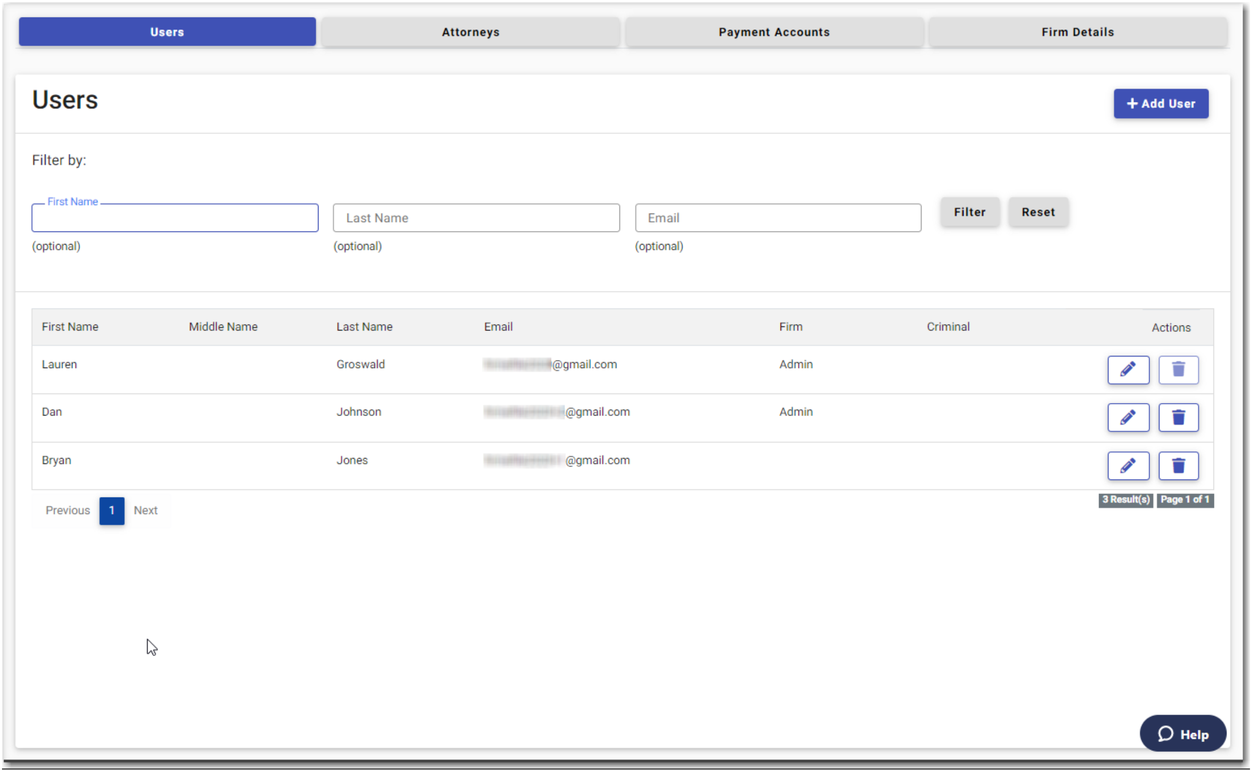


Figure 2.10 – Example of a Firm Users Page

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.

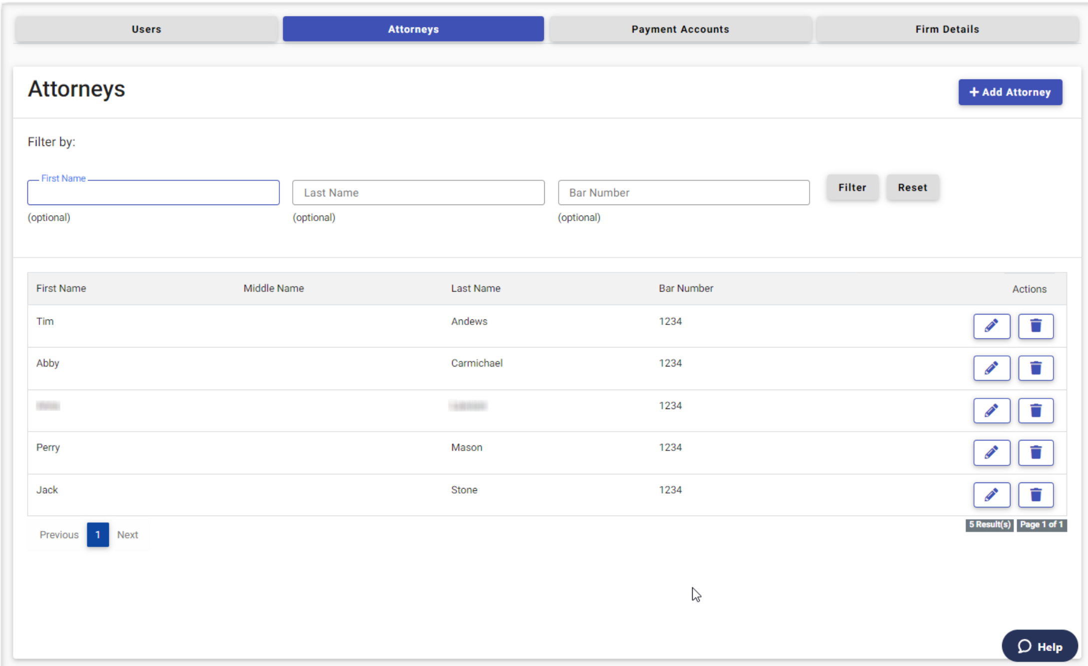


Figure 2.11 – Example of an Attorneys Page

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.

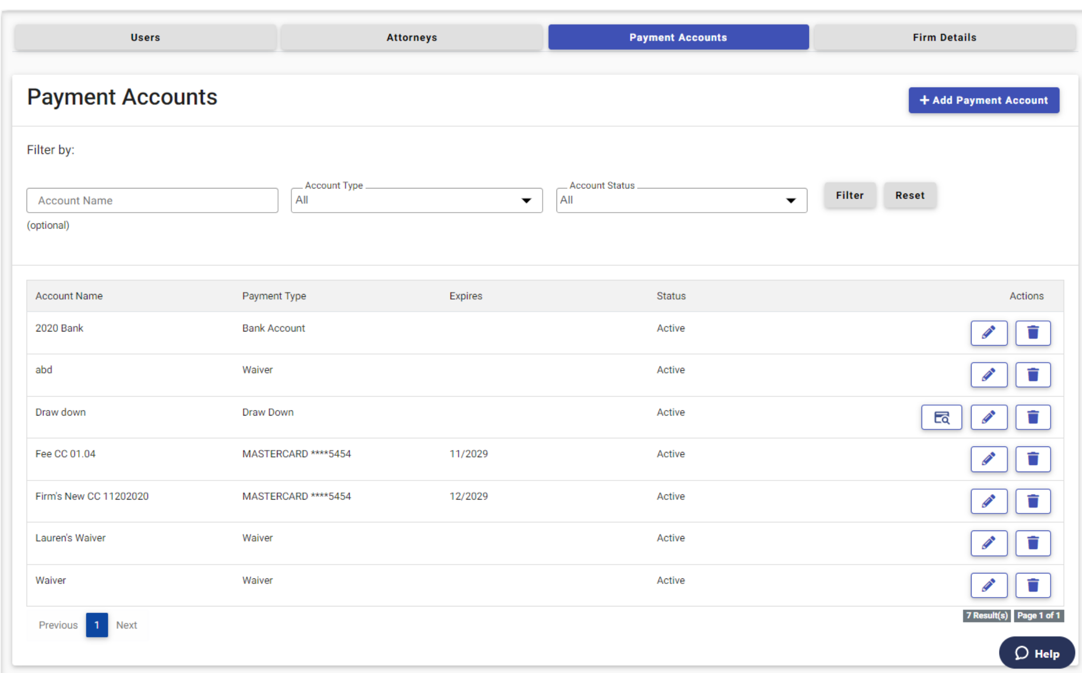


Figure 2.12 – Payment Accounts Page

Firm Details

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

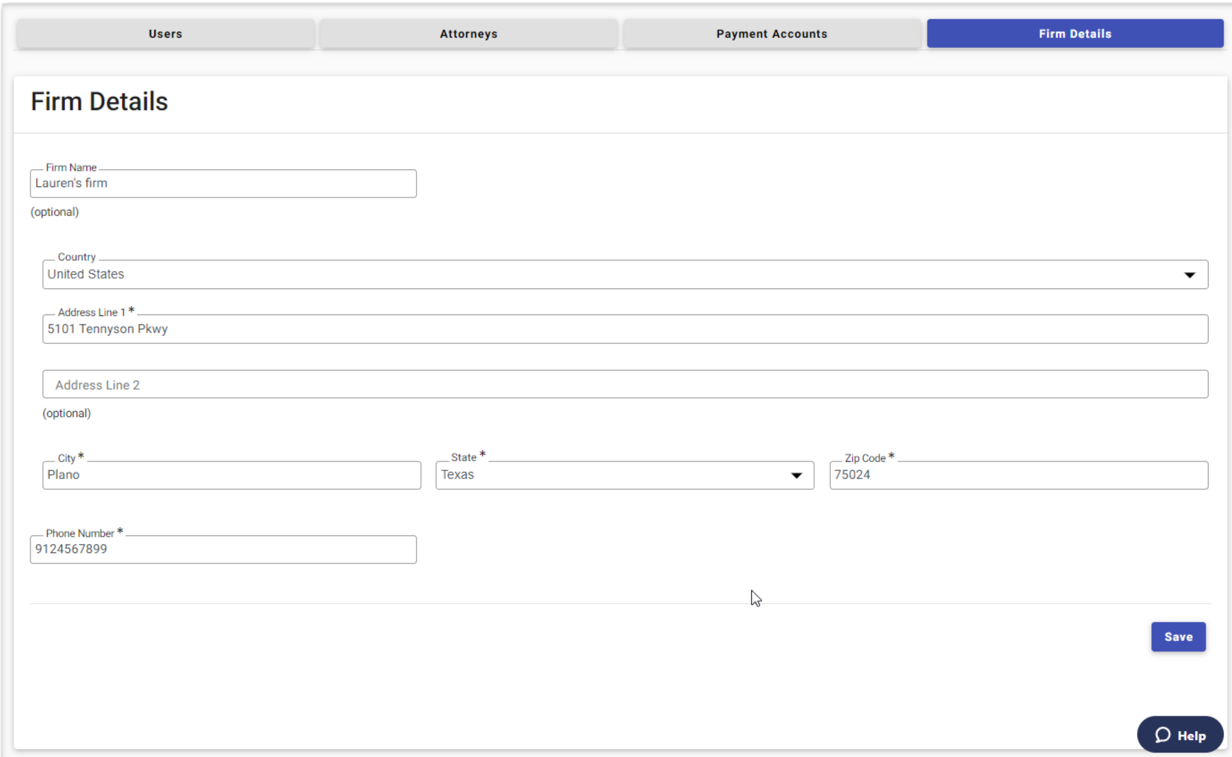


Figure 2.13 – Example of a Firm Details Page

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.

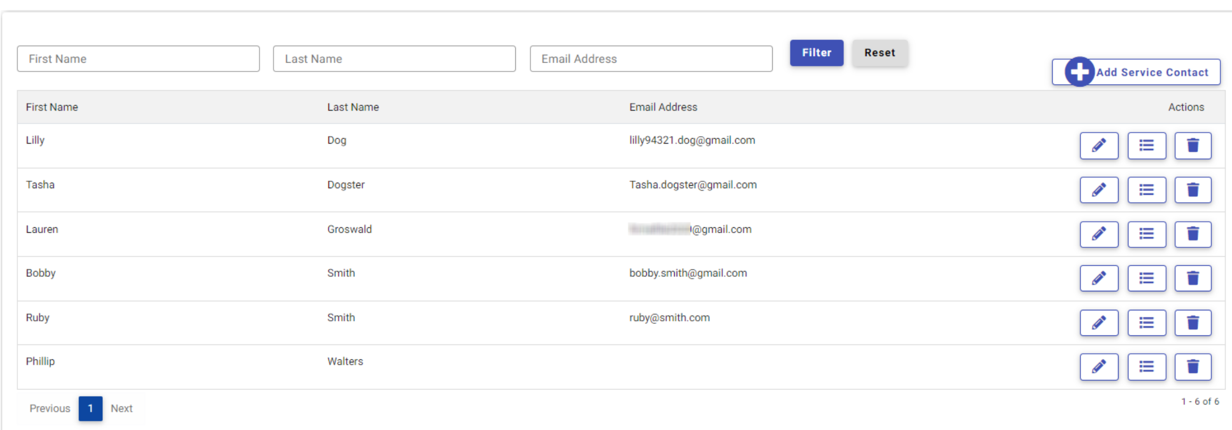


Figure 2.14 – Service Contacts Page

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.

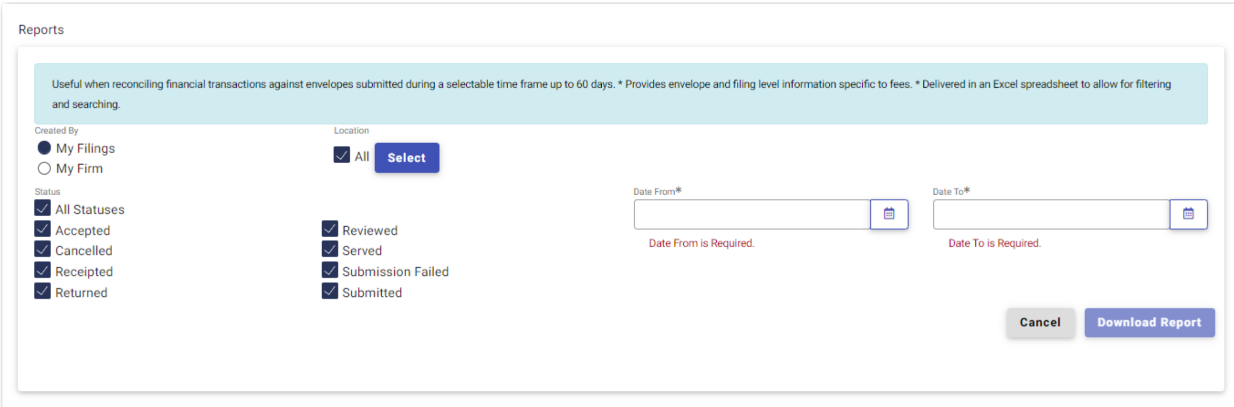


Figure 2.15 – Reports Page

3 E-Filing Overview

Topics covered in this chapter

♦ Filing Queue Status

This chapter describes the e-filing process.

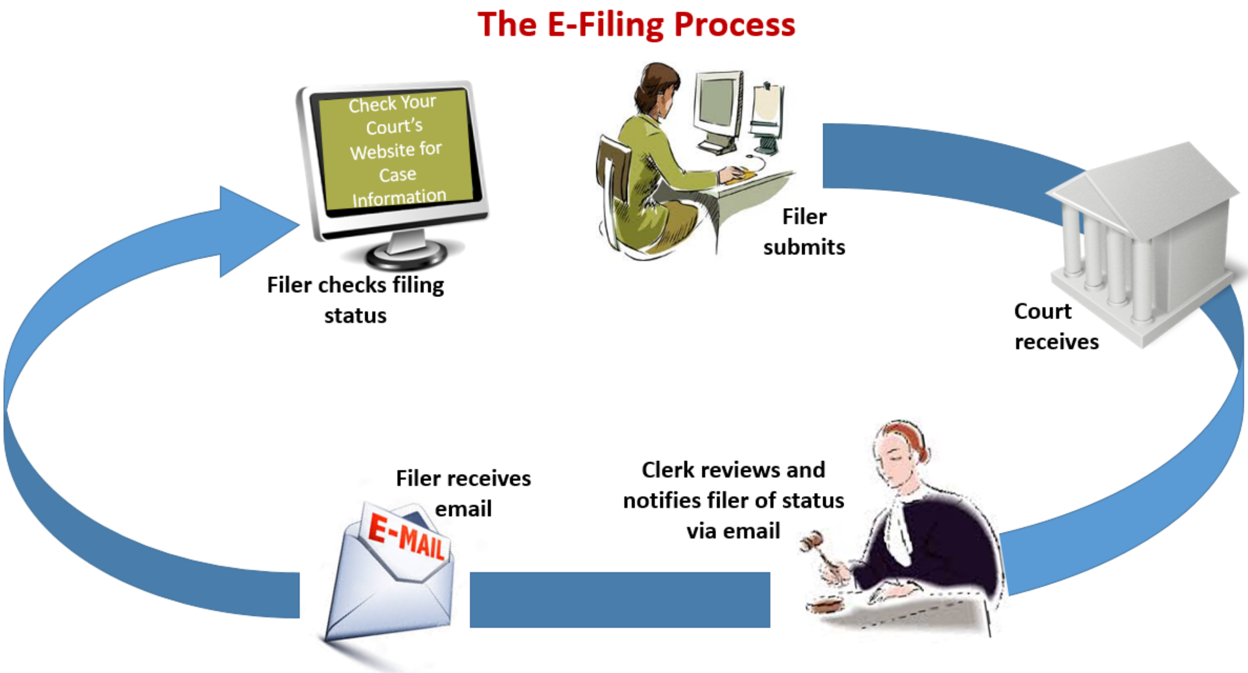


Figure 3.1 – The E-Filing Process

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

If the clerk accepts the filing, the case is docketed and set to appear in the clerk’s case management system. The clerk sends an email 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, the clerk sends an email 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 the 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 filing status key represents the status listed for your filing.

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

Note: EFO means EFile Only, EFS means EfileAndServe, and SO means 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 option 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 workflow.
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 (SO) filings are completed.

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

4 Landing Page

Topics covered in this chapter

♦ Registering as a Firm Administrator
♦ Resetting a Forgotten Password
♦ Updating Firm Information

The *Landing* page serves as the gateway to File & Serve. From this page, you can register or sign in to File & Serve.

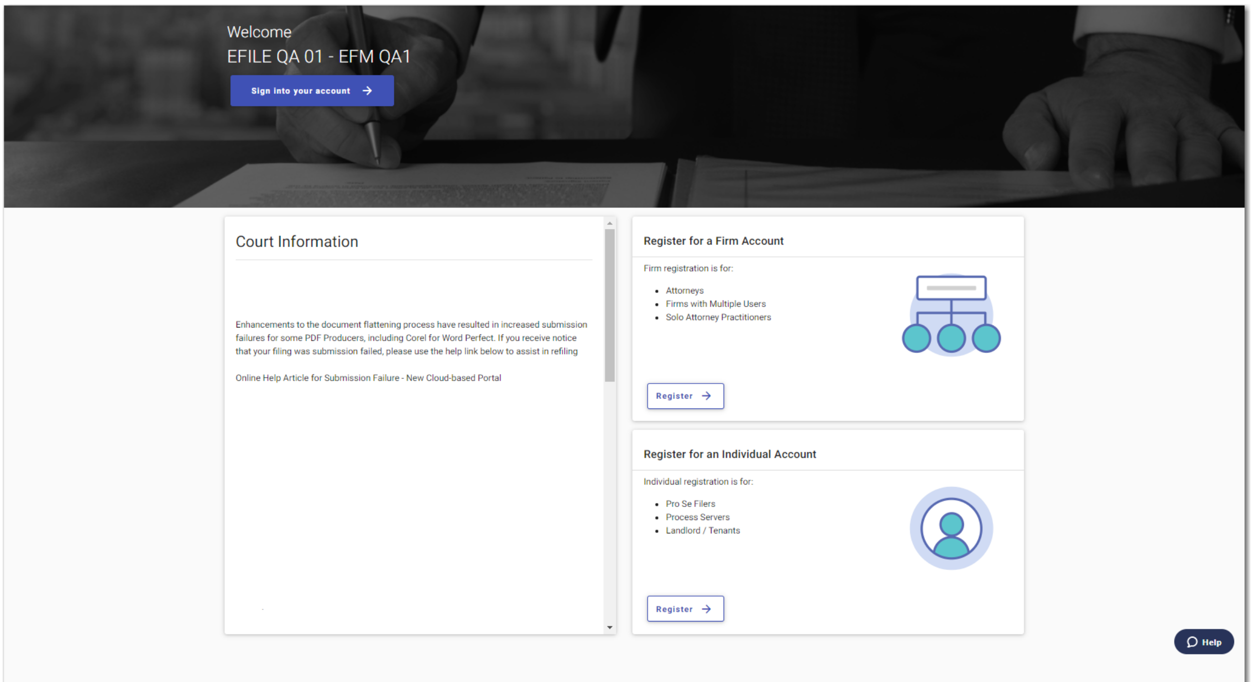
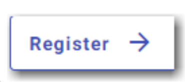


Figure 4.1 – Example of an eFile Landing Page

Registering as a Firm Administrator

You can register your firm in File & Serve.

To register as a Firm Administrator:

1. On the *Landing* page, in the Register for a Firm Account pane, click 

.

   The *Firm Account Registration* page is displayed.

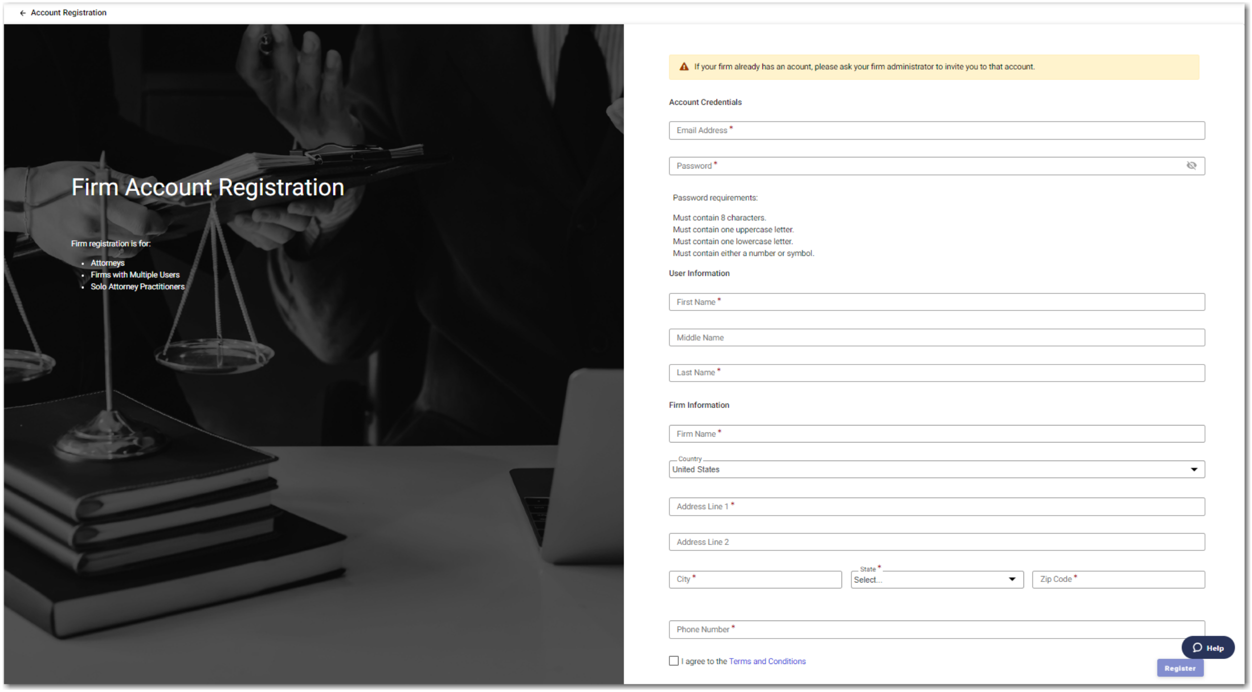


Figure 4.2 – Example of a Firm Account Registration Page

2. Complete the required fields.
3. 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 *Firm Account Registration* page.

4. Click 

.

   The *Registration Successful* page is displayed.

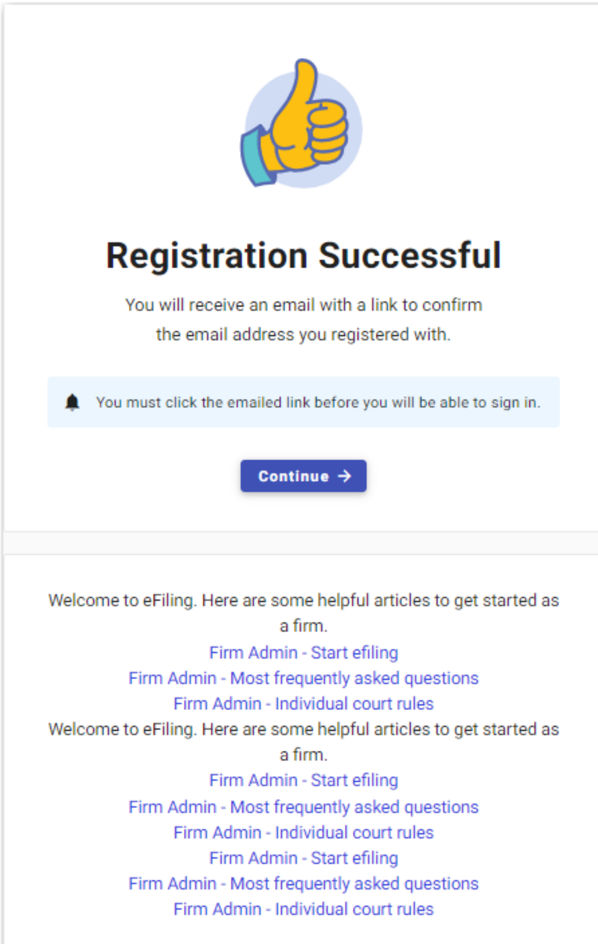
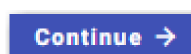


Figure 4.3 – Registration Successful Page

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

   Note: You must verify your email address to complete the registration process. A verification email (from 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.

6. You can now navigate to the *Landing* page to sign in, or click 

on the *Registration Successful* page.

Resetting a Forgotten Password

If you have forgotten your password, you can reset it from the *Sign In* page.

To reset your password:

1. On the *Sign In* page, click 

.

The *Reset Password* window is displayed.

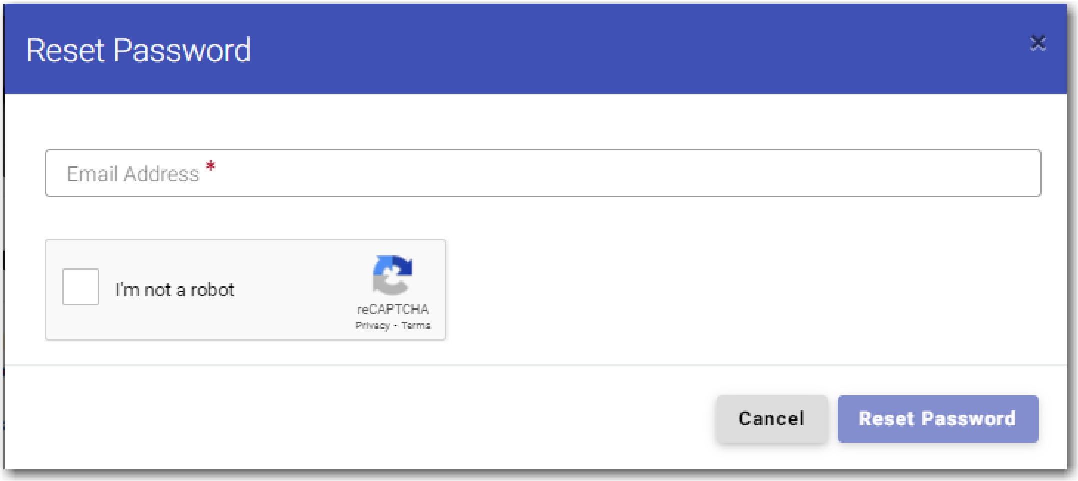


Figure 4.4 – Reset Password Window

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

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

   Note: Depending on your browser, you may not see the images.

4. Click the requested images, and then click VERIFY.

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

5. After selecting the correct images, click **Reset Password**.

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

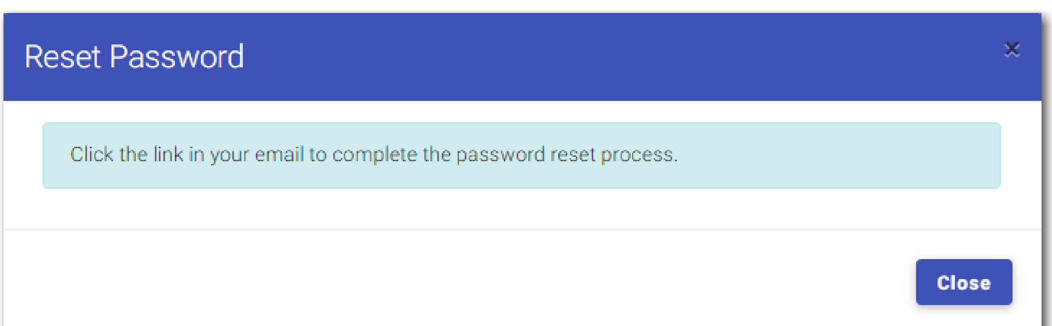


Figure 4.5 – Reset Password Window—Complete Reset Process

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

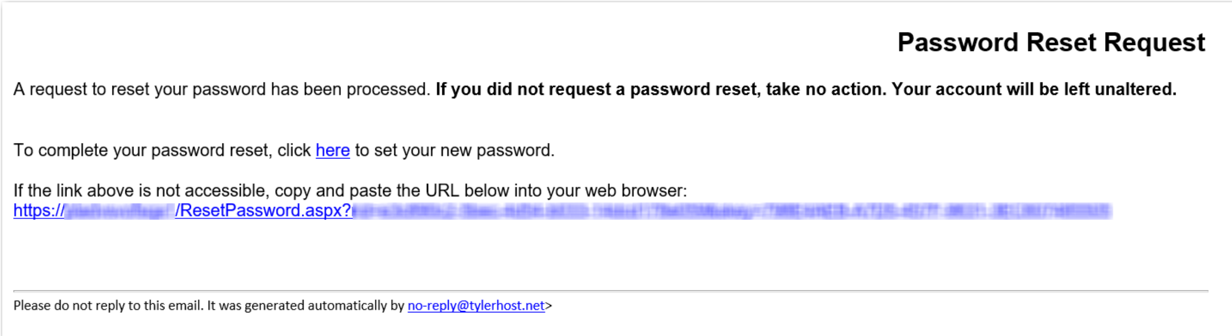


Figure 4.6 – Example of the Password Reset Request Email

8. Click **here** to reset your password.

   You are prompted to create a new password.

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

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

10. Retype your new password in the **Repeat New Password** field.

11. Click **Change Password**.

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

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.

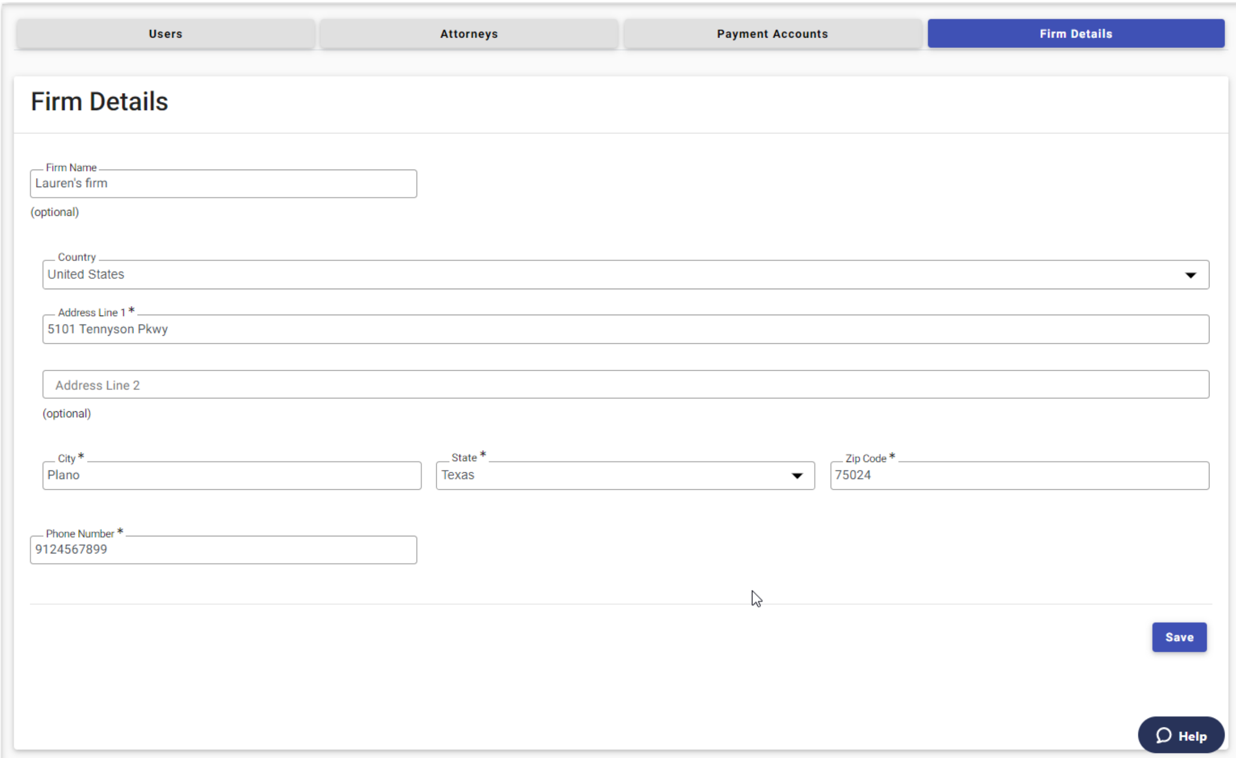


Figure 4.7 – Example of a Firm Details Page

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

5 Sign In and Sign Out

Topics covered in this chapter

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

Signing In

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

Note: Click Register → to register if you have not registered before.

To sign in to the application:

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

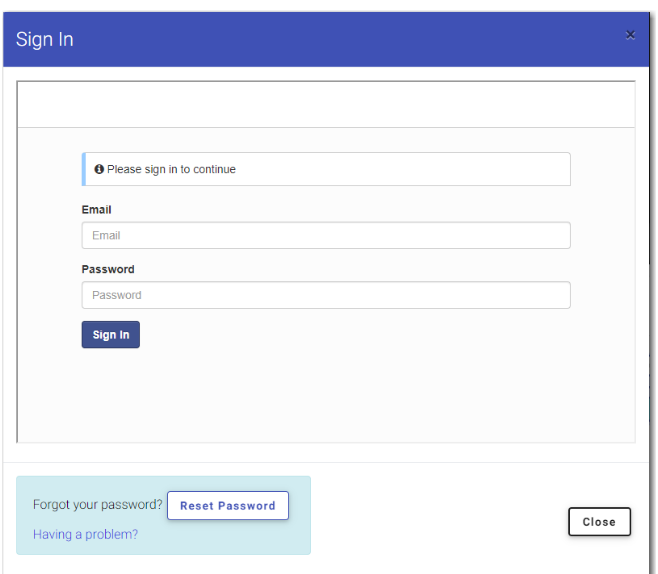


Figure 5.1 – Example of a Sign In Page

4. Click Sign In .

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 your 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 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.

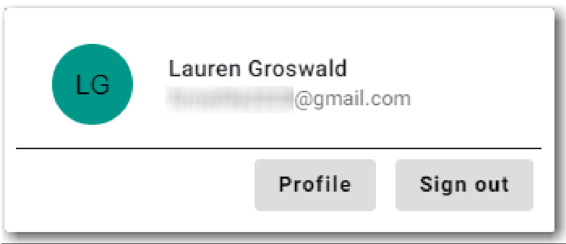


Figure 5.2 – Manage Account Window

2. Click 

.

   You are now signed out of the application.

6 Manage Account

Topics covered in this chapter

You can manage some of your account settings when you are signed in to File & Serve.

You can perform the following actions:

- Change your password
- Update your user profile
- Update your preferences for the following features:
  - Enabling or disabling hot keys in File & Serve
  - Enabling or disabling the Document Merge feature
- Select your email notifications regarding your case filings

Changing Your 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.

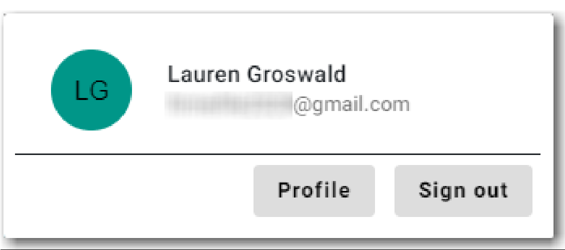


Figure 6.1 – Manage Account Window

2. Click 

.

   The *Profile* page is displayed.
3. Click **Change Password**.

   The *Change Password* page is displayed.

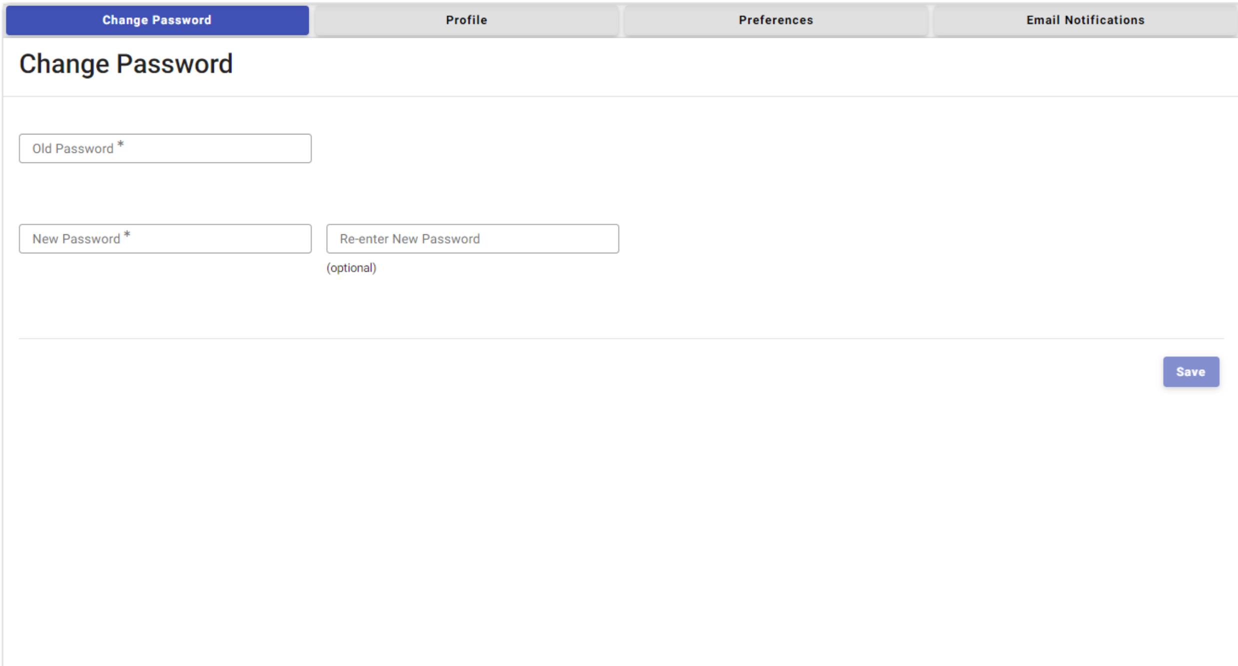


Figure 6.2 – Change Password Page

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.
7. Click 

.

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.

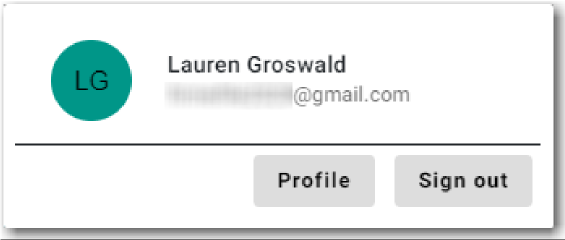


Figure 6.3 – Manage Account Window

2. Click 

.

   The *Profile* page is displayed.

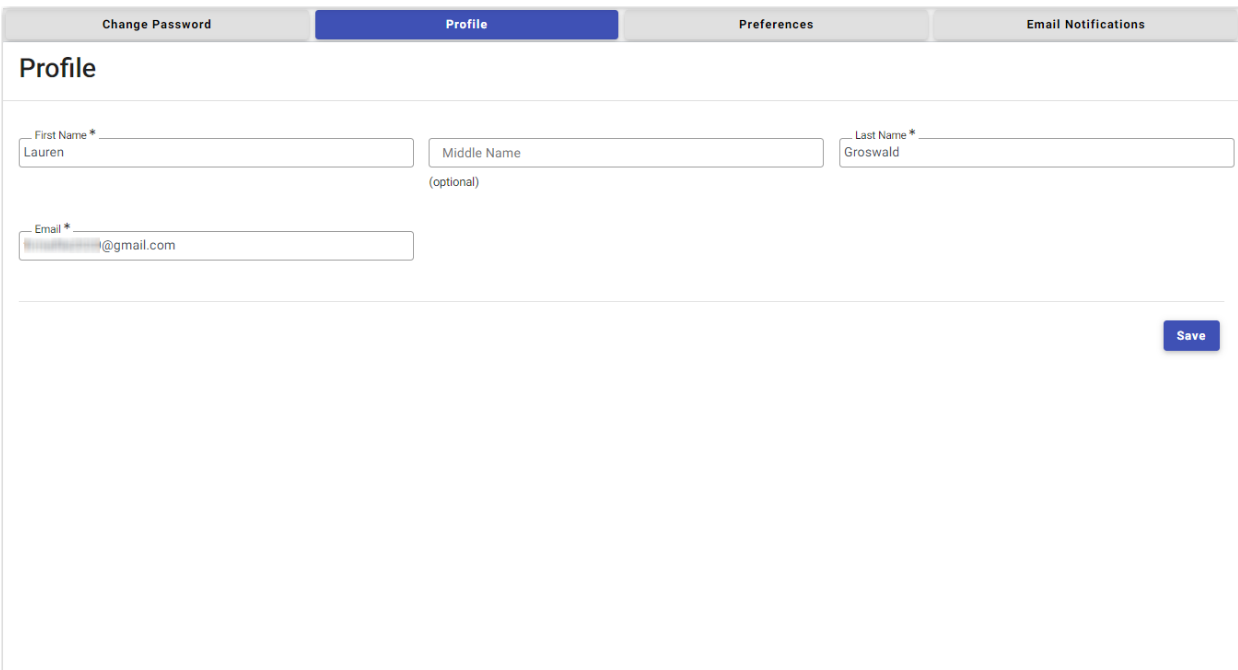


Figure 6.4 – Profile Page

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.
5. Click 

.

Updating Preferences

You can update your preferences for Hot Keys and the Document Merge feature on the *Profile* page.

To update your preferences:

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

The *Manage Account* window is displayed.

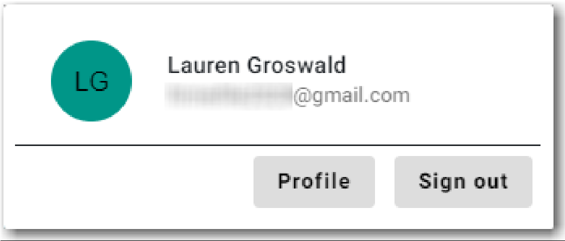


Figure 6.5 – Manage Account Window

2. Click .

   The *Profile* page is displayed.

3. Click **Preferences**.

   The *Preferences* page is displayed.

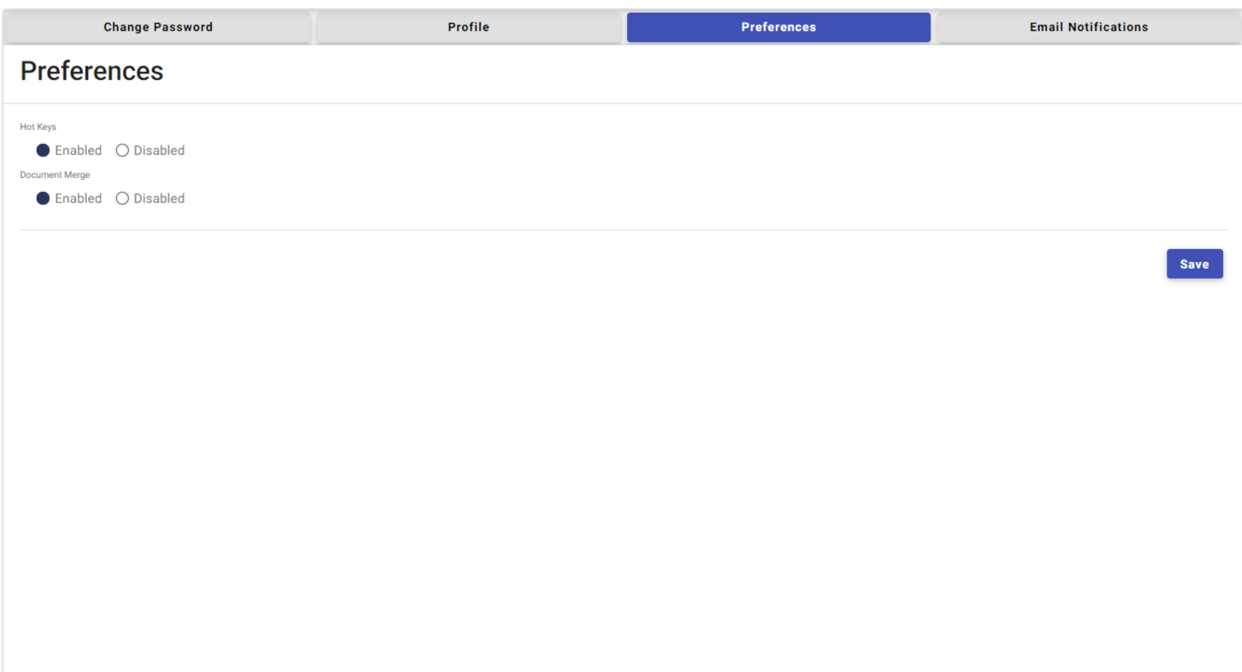


Figure 6.6 – Preferences Page

4. Select either the **Enabled** option or the **Disabled** option for Hot Keys.
5. Select either the **Enabled** option or the **Disabled** option for the Document Merge feature.
6. Click .

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.

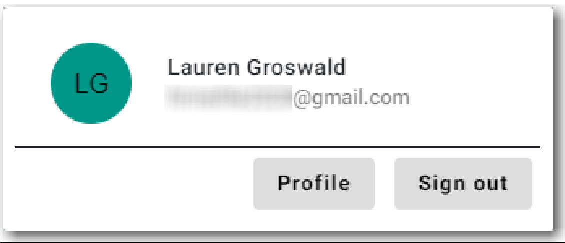


Figure 6.7 – Manage Account Window

2. Click  .

   The *Profile* page is displayed.

3. Click **Email Notifications**.

   The *Email Notifications* page is displayed.

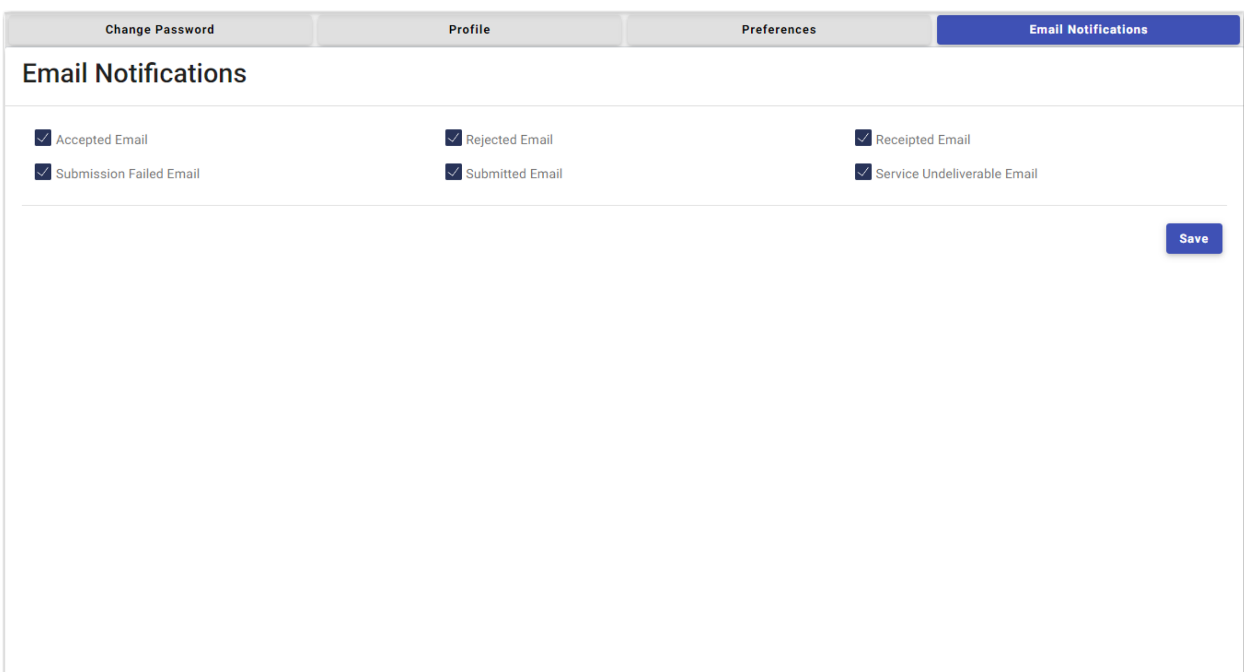


Figure 6.8 – Email Notifications Page

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

5. Click Save.

7 Dashboard

Topics covered in this chapter

♦ Dashboard Page

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

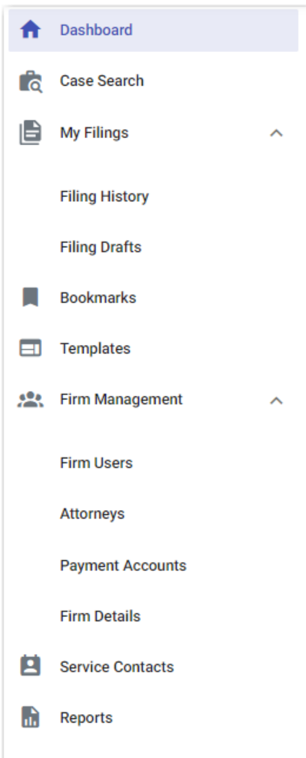


Figure 7.1 – Dashboard

From the Dashboard, 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 *Users* page to add and remove firm users.
- Access the *Attorneys* page to add and remove firm attorneys.
- Access the *Payment Accounts* page to set up and manage the firm's 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.

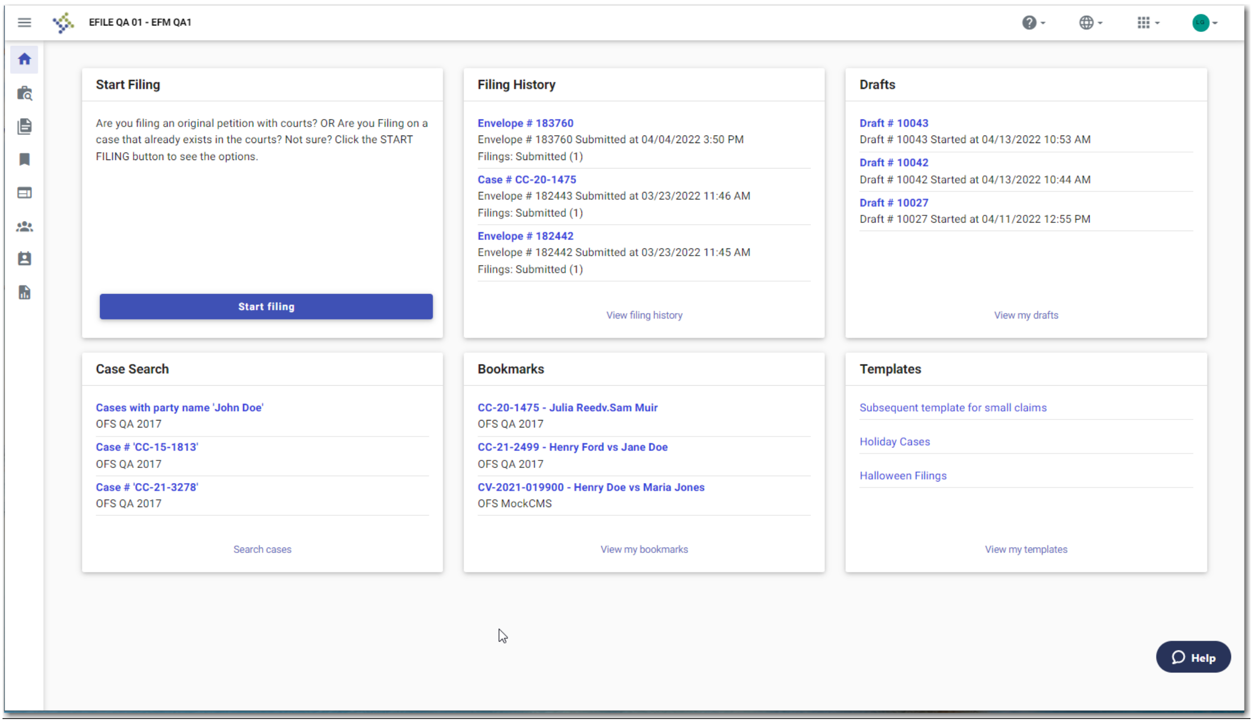


Figure 7.2 – Dashboard Page

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.

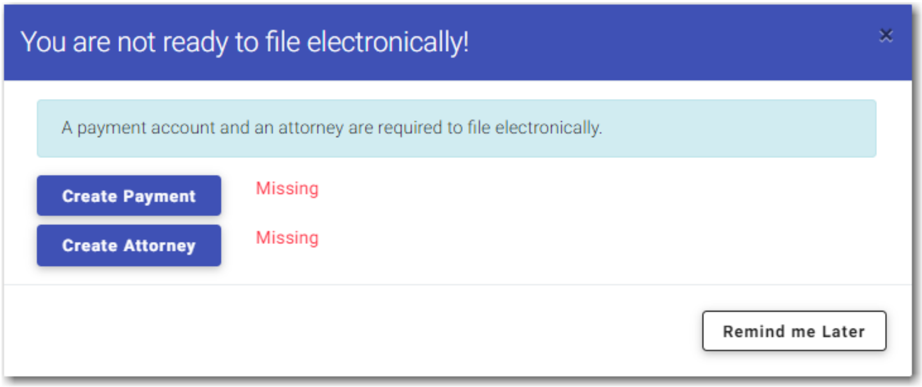


Figure 7.3 – Warning Message

Start Filing

Click 

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.

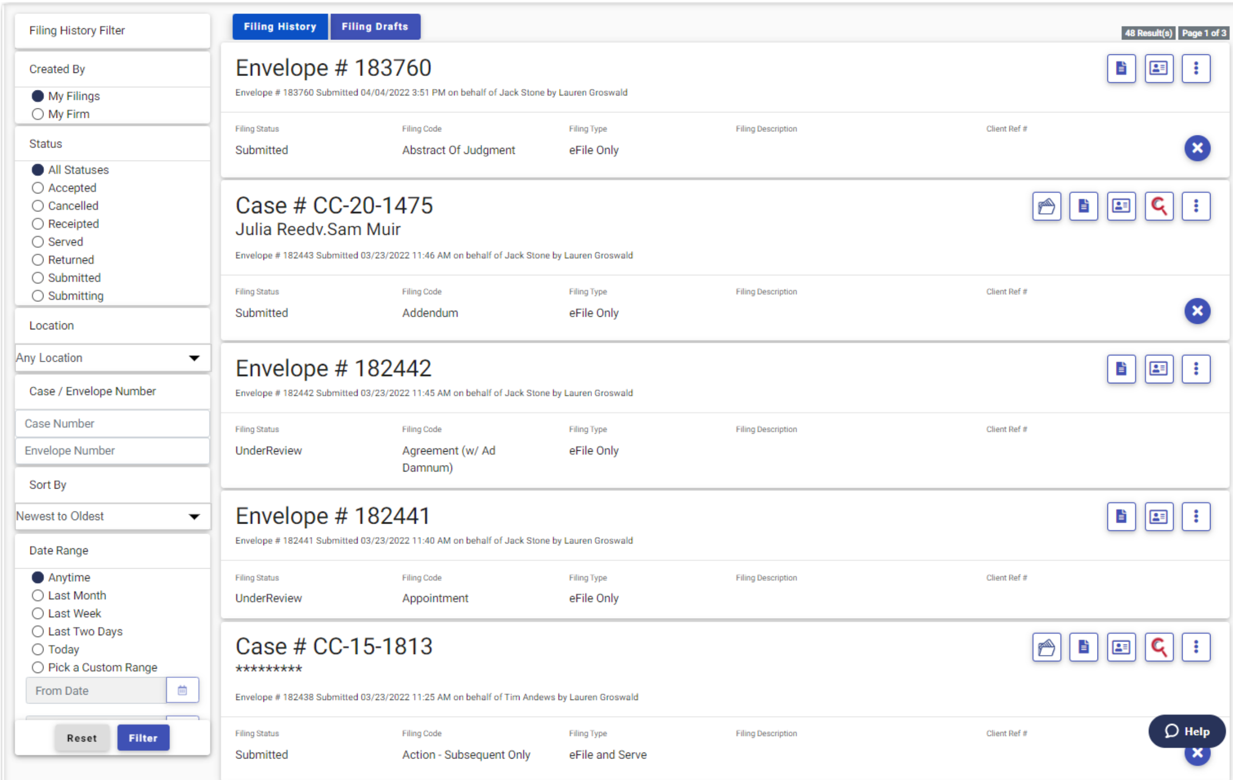


Figure 7.4 – Filing History Page

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.

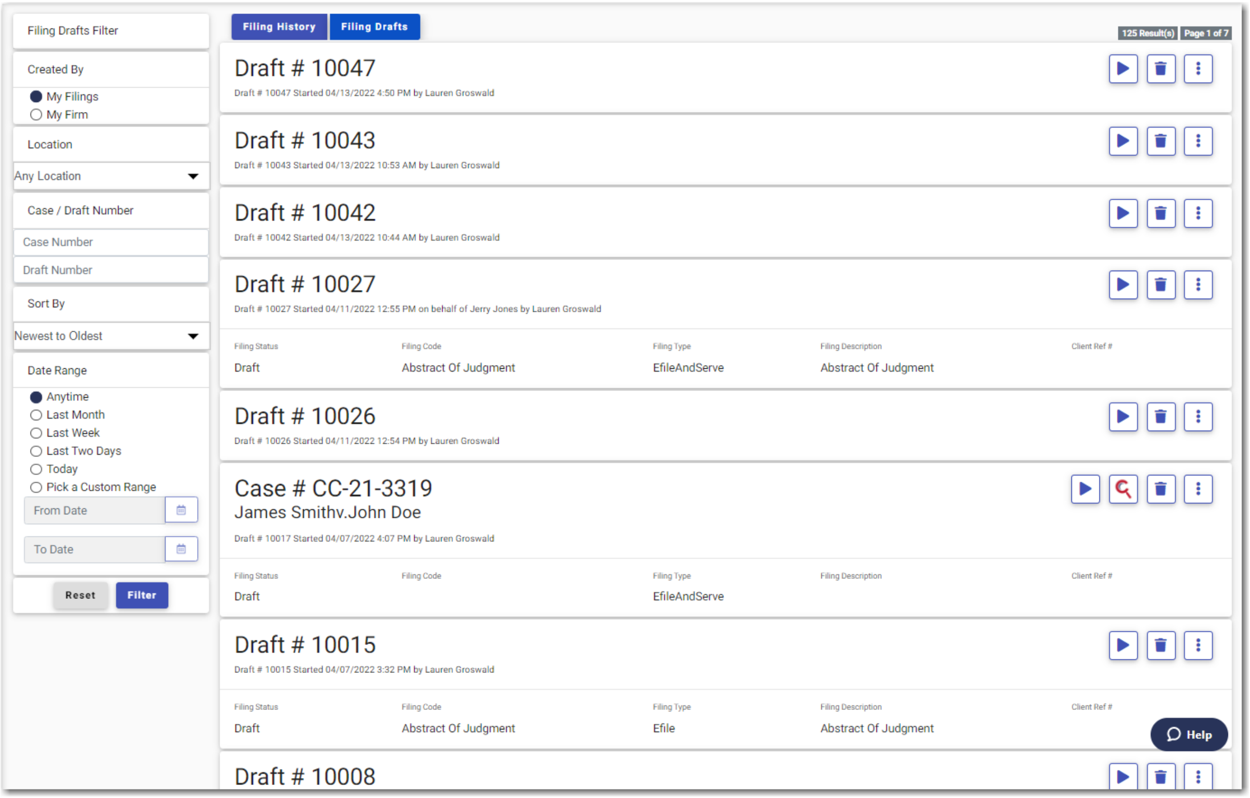


Figure 7.5 – Filing Drafts Page

Case Search

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

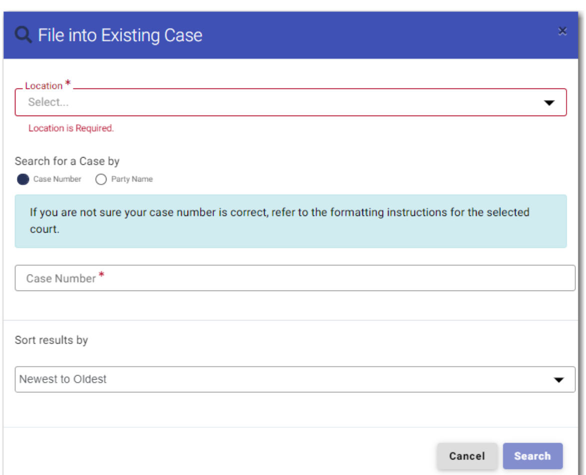
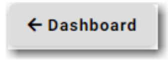


Figure 7.6 – Example of a File into Existing Case Window

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

If your search does not produce any results, click 

to return to the *Dashboard* page.

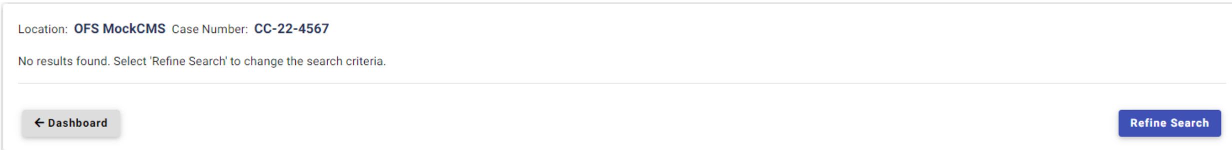


Figure 7.7 – Case Search Page with No Search Results Displayed

Bookmarks

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

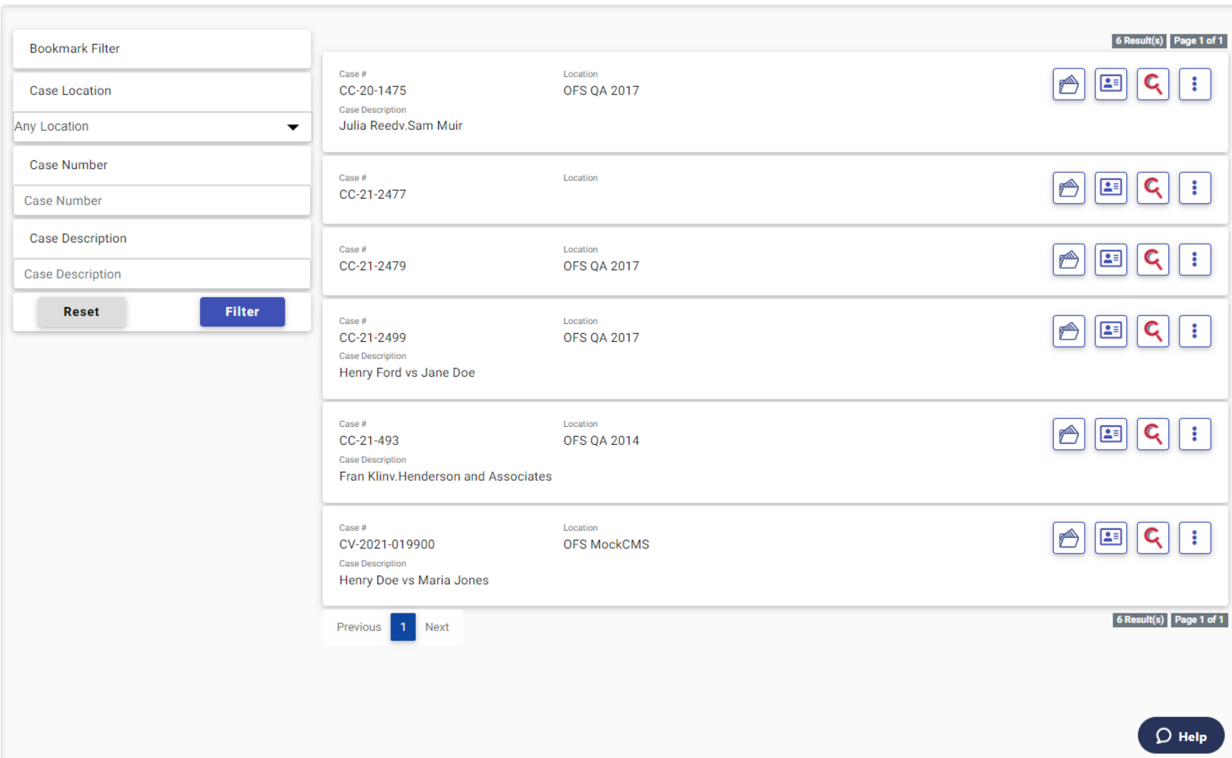


Figure 7.8 – Example of a Bookmarks Page

Templates

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

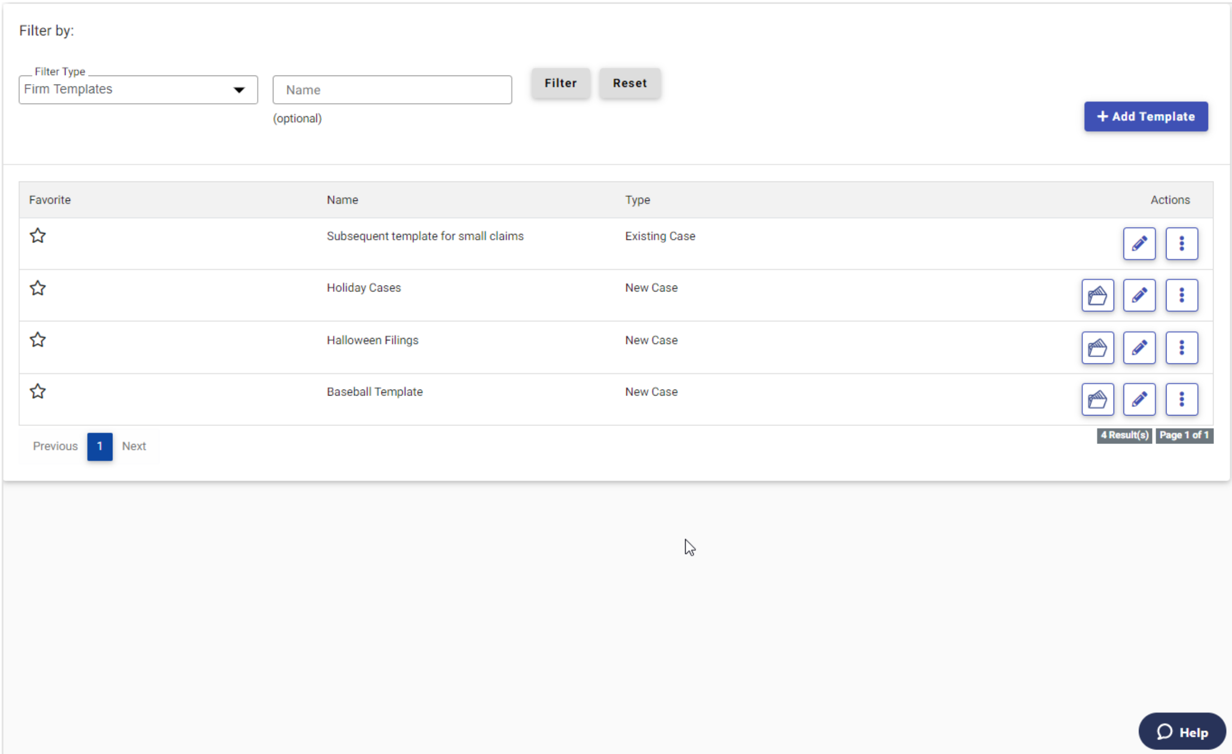


Figure 7.9 – Templates Page

8 Firm Administrator Functions

Topics covered in this chapter

Firm Administrators are responsible for managing users, attorneys, and payment accounts; and for updating the firm's information.

Manage Firm Users

The Firm Administrator is responsible for adding and inviting new users, as well as for 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 *Users* page is displayed.

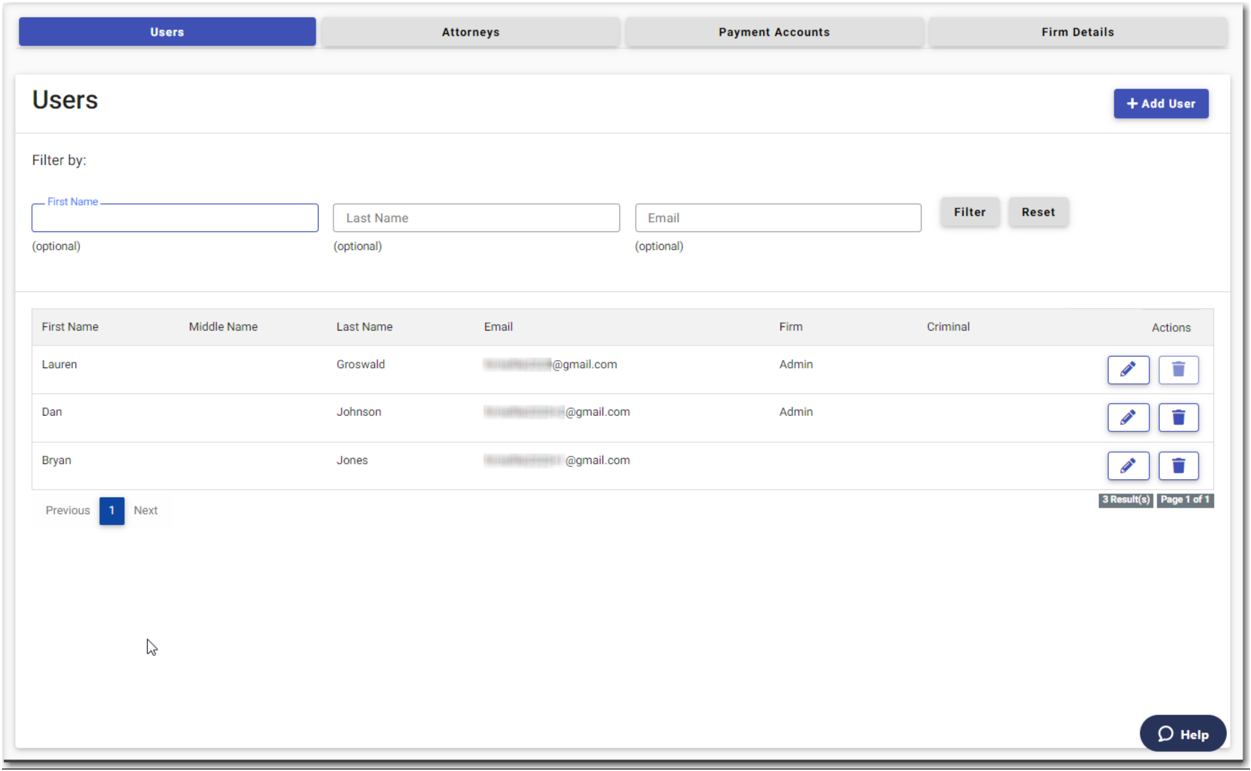


Figure 8.1 – Users Page

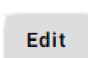
2. Click 

.

   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 

to assign the Criminal Filer role.

   The *Edit user criminal filer role* window is displayed.

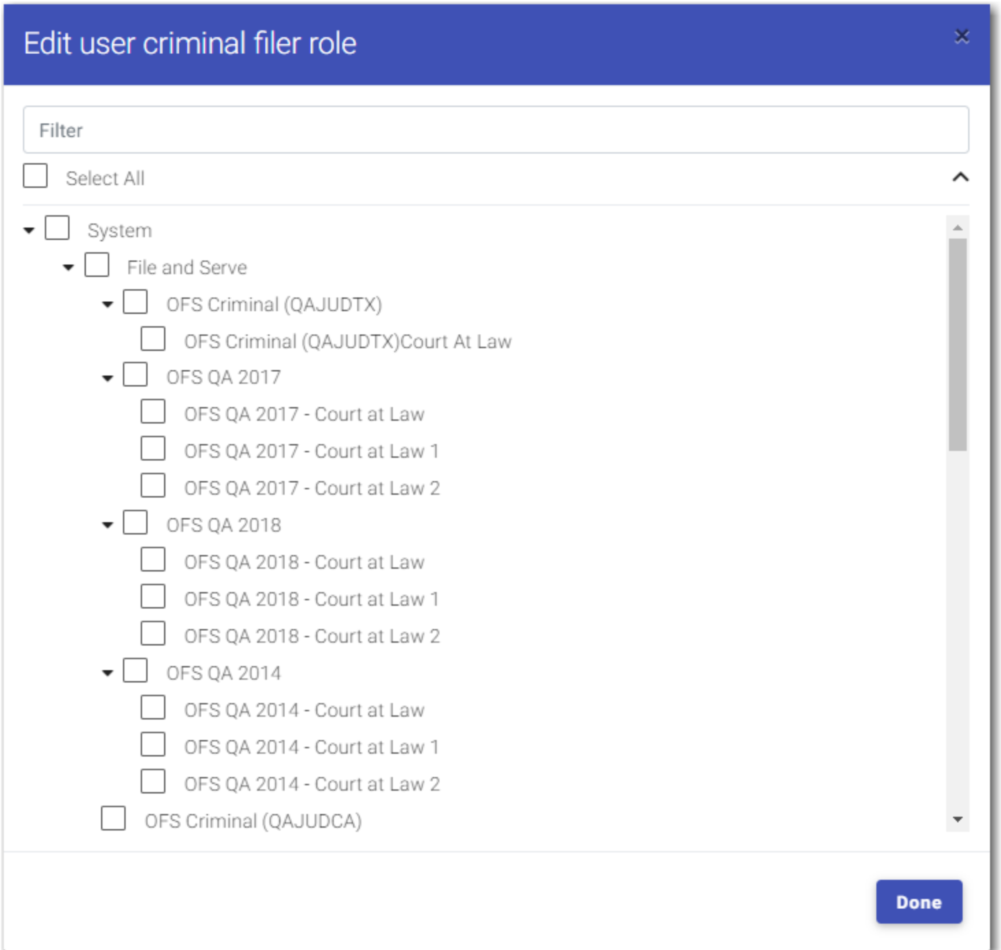


Figure 8.2 – Edit User Criminal Filer Role Window

7. Select the locations where you want the new user to have the Criminal Filing Filer role.
8. After selecting the locations, click **Done**.
9. After you have entered all of the information for the new user, click **Invite**.

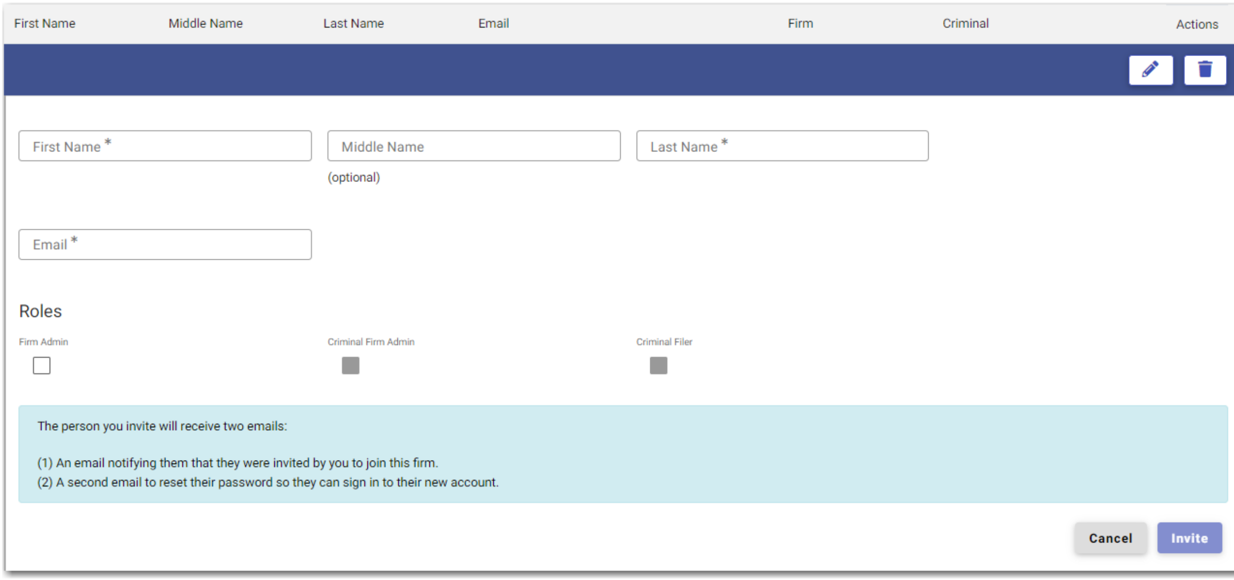


Figure 8.3 – Example of a New Firm User Pane

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

Resetting a Firm User's Password

As a Firm Administrator, you can reset a user's password if the user has forgotten it and needs to have it reset.

To reset a user's password:

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

   The *Users* page is displayed.

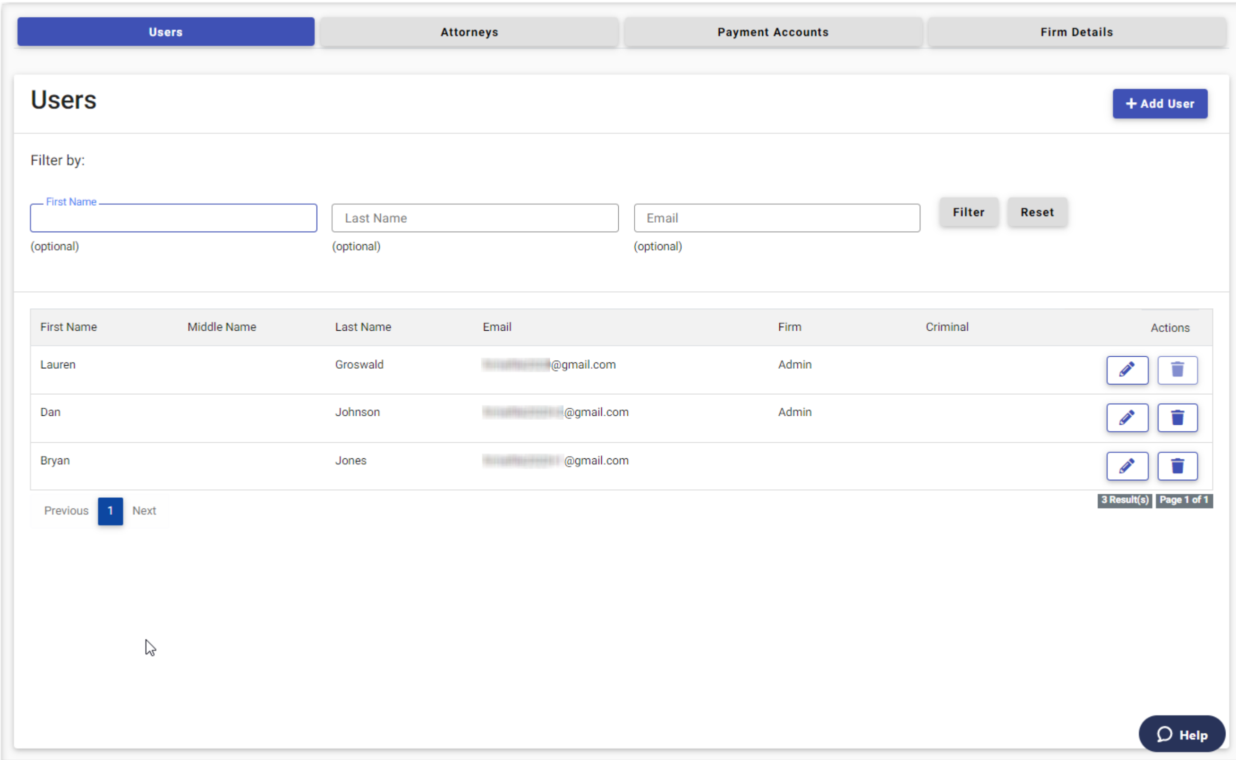


Figure 8.4 – Example of a Users Page

2. Locate the firm user for whom you want to reset the password, and then, click .

   The information for the specified firm user is displayed.

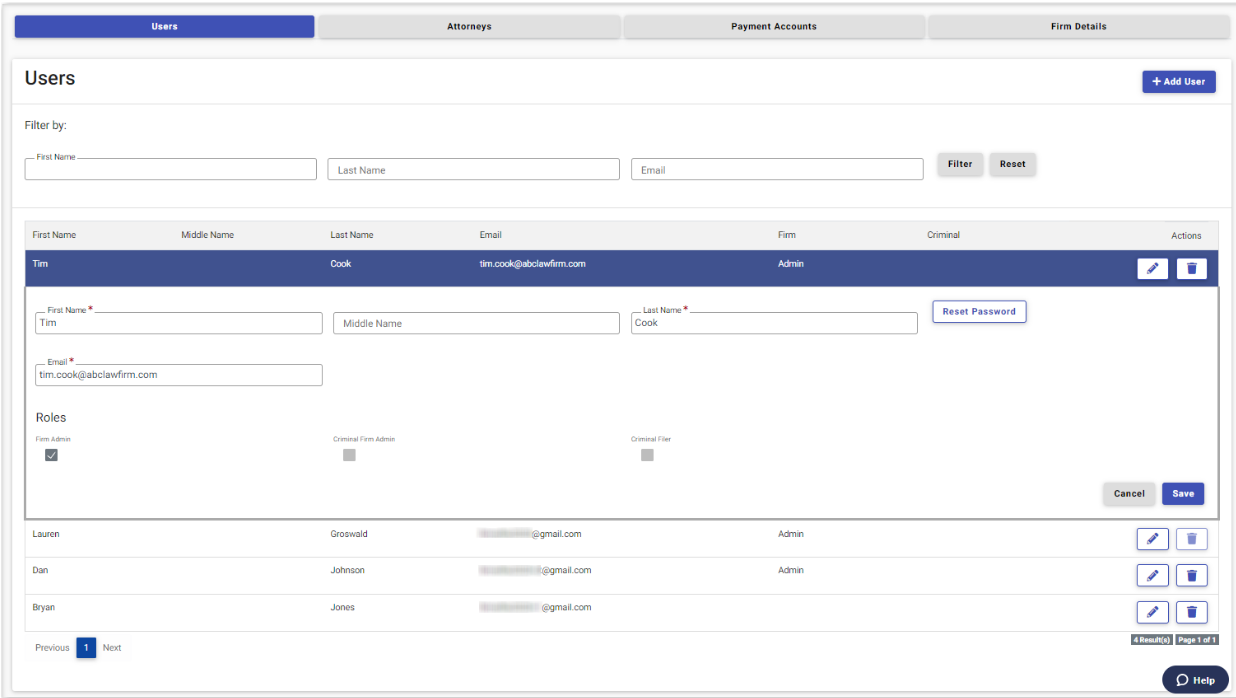


Figure 8.5 – Firm User Information on the Users Page

3. Click **Reset Password**.

   The *Change Password* window is displayed.

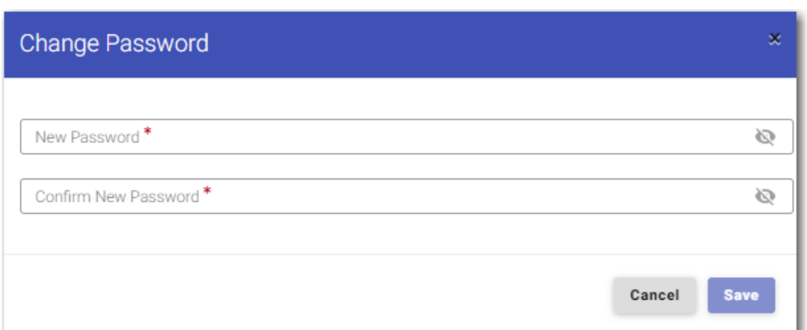


Figure 8.6 – Change Password Window

4. Type the new password in the **New Password** field.

   Note: The 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.

5. Retype the new password in the **Confirm New Password** field.

6. Click **Save**.

Editing a Firm User's Information

To edit a firm user's information:

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

   The *Users* page is displayed.

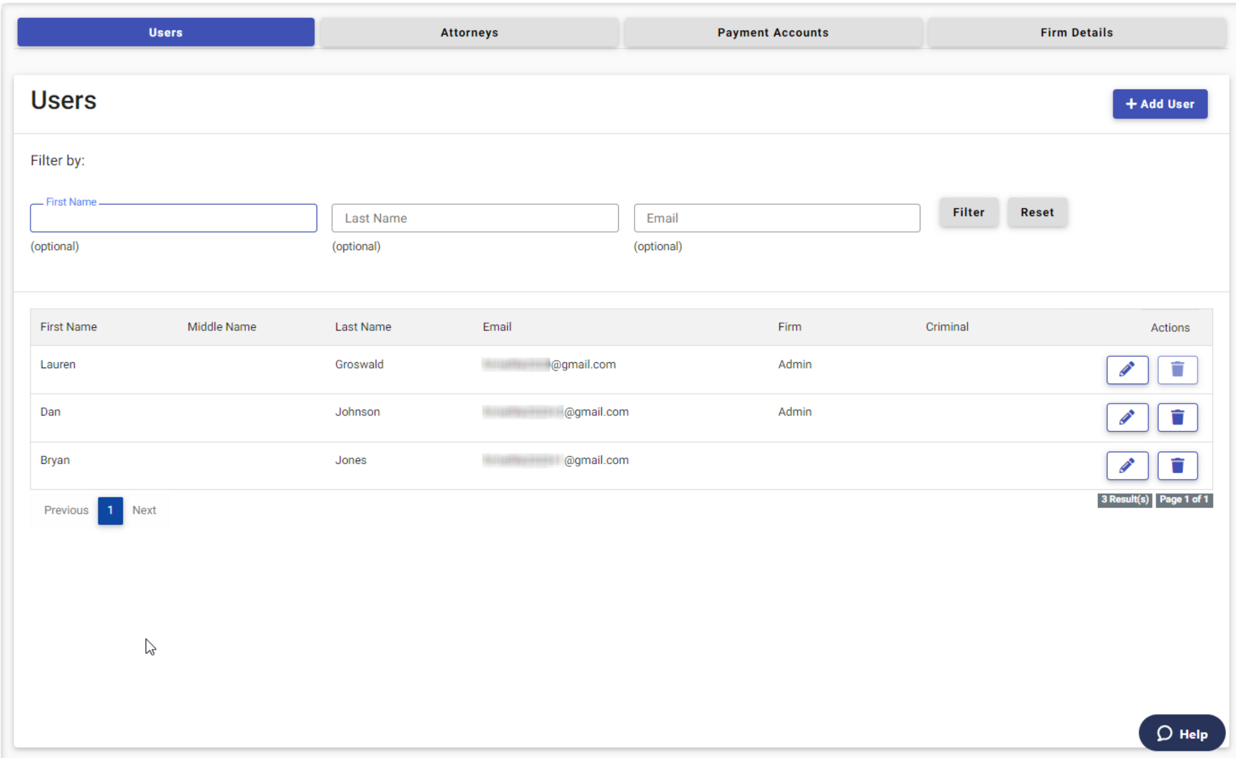


Figure 8.7 – Users Page

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 

.

Removing a User from the Firm

To remove a user from the firm:

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

   The *Users* page is displayed.

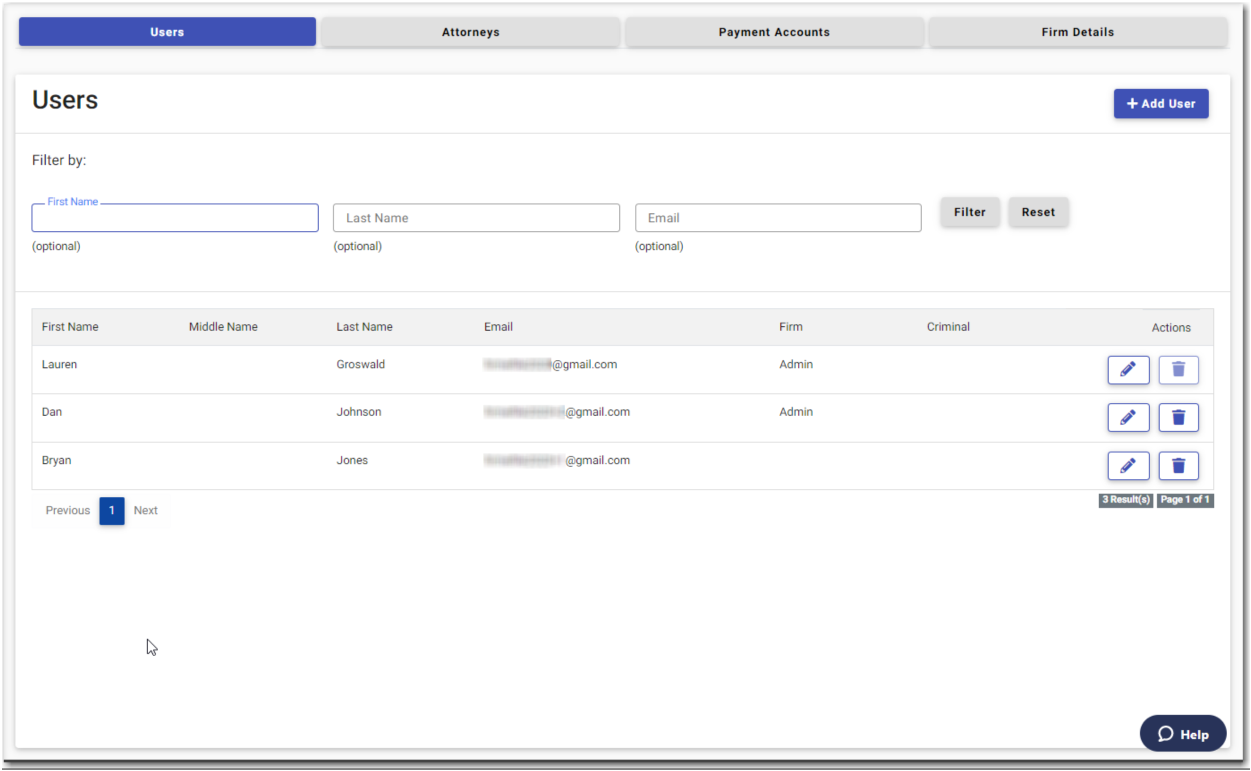
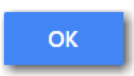


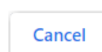
Figure 8.8 – Users Page

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

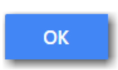
   Note: You cannot delete yourself from the firm. The Delete icon is disabled for the user who is currently signed in to the system.

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

3. Click 

 to remove the user from the firm, or click 

 to cancel the action.

   If you clicked 

, a confirmation message is displayed, and the user is removed from the firm.

Manage Attorneys

The Firm Administrator is responsible for managing the firm's 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.

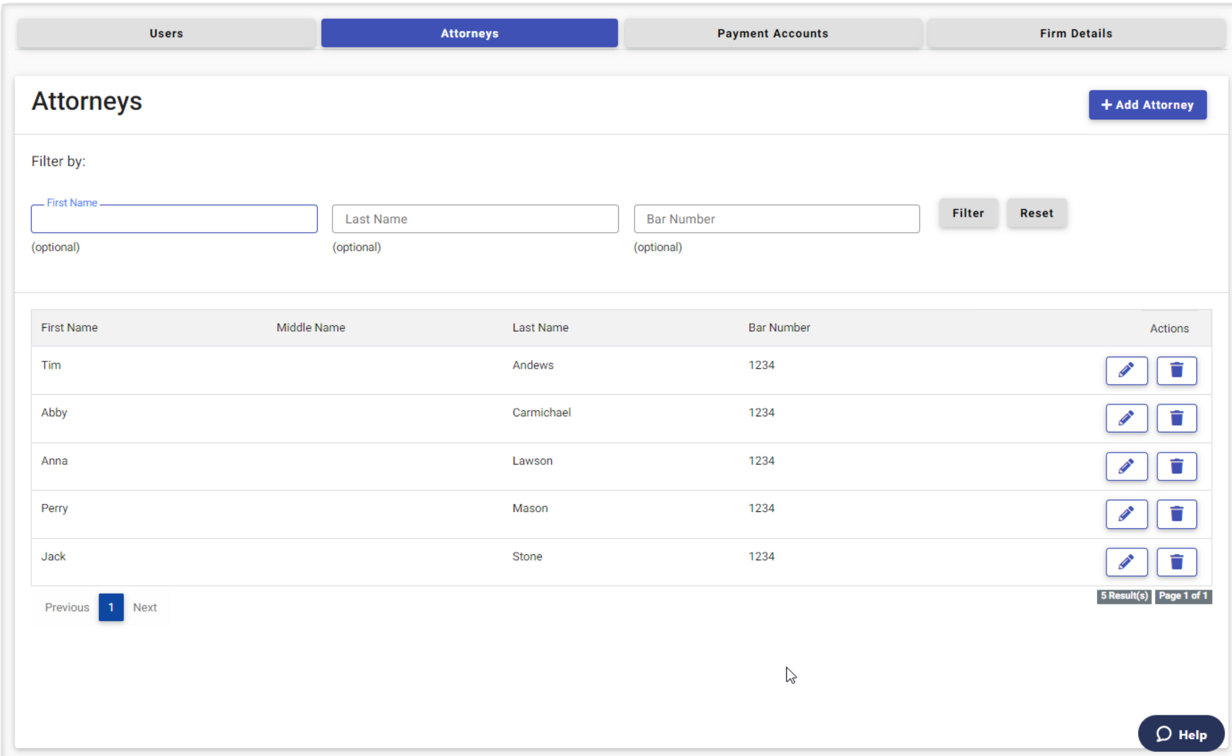


Figure 8.9 – Attorneys Page

2. Click 

.

   The **New Attorney** section is displayed.

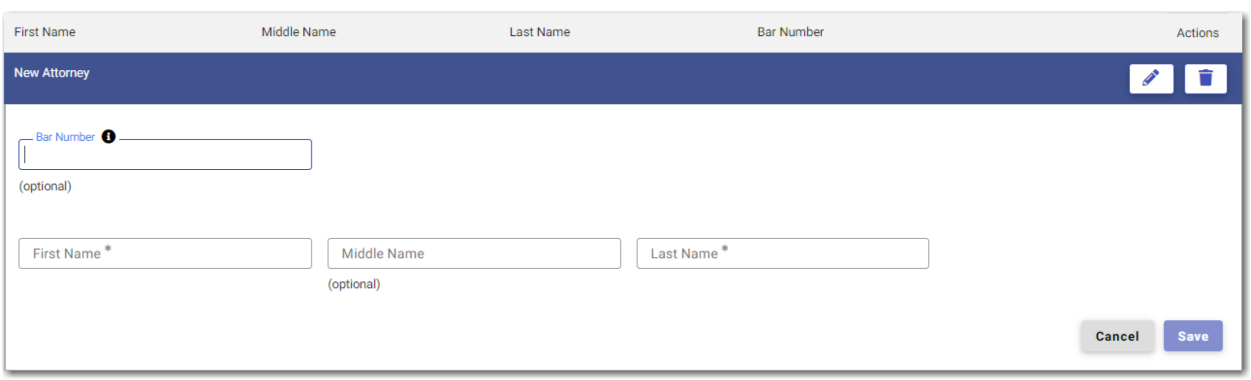


Figure 8.10 – New Attorney Section

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.
5. Click 

.

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.

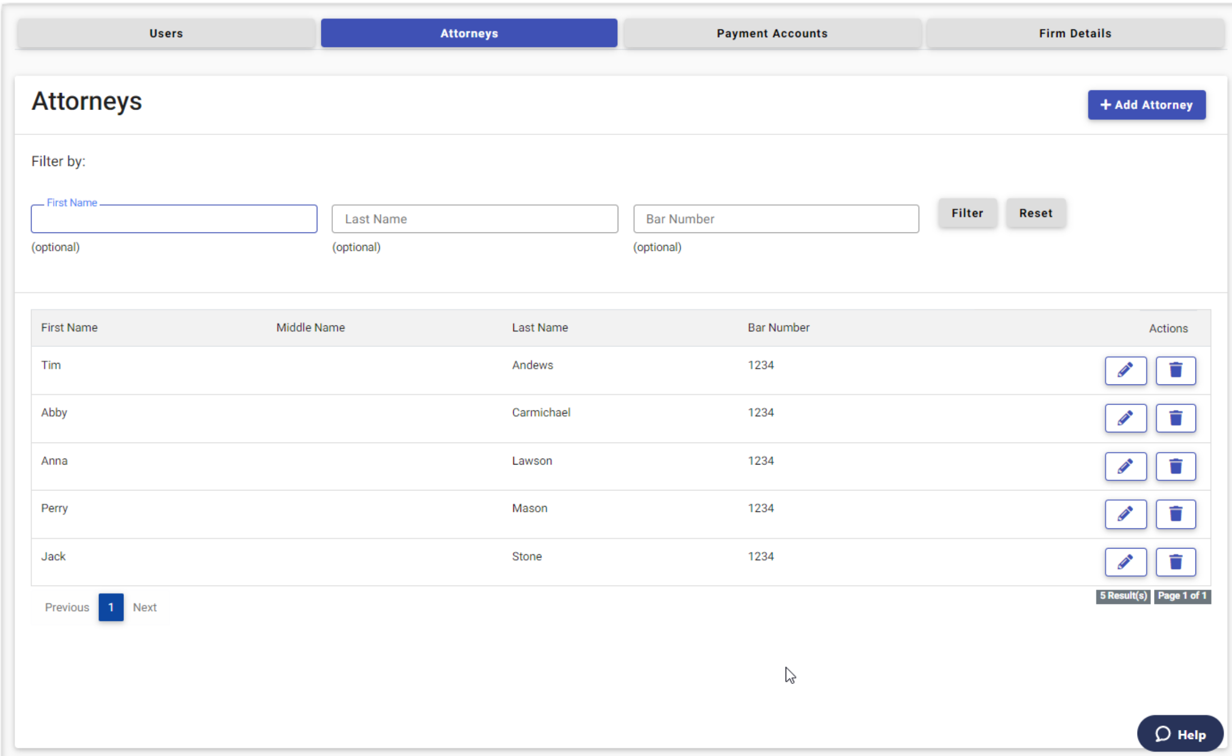


Figure 8.11 – Attorneys Page

2. 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:

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

   The *Attorneys* page is displayed.

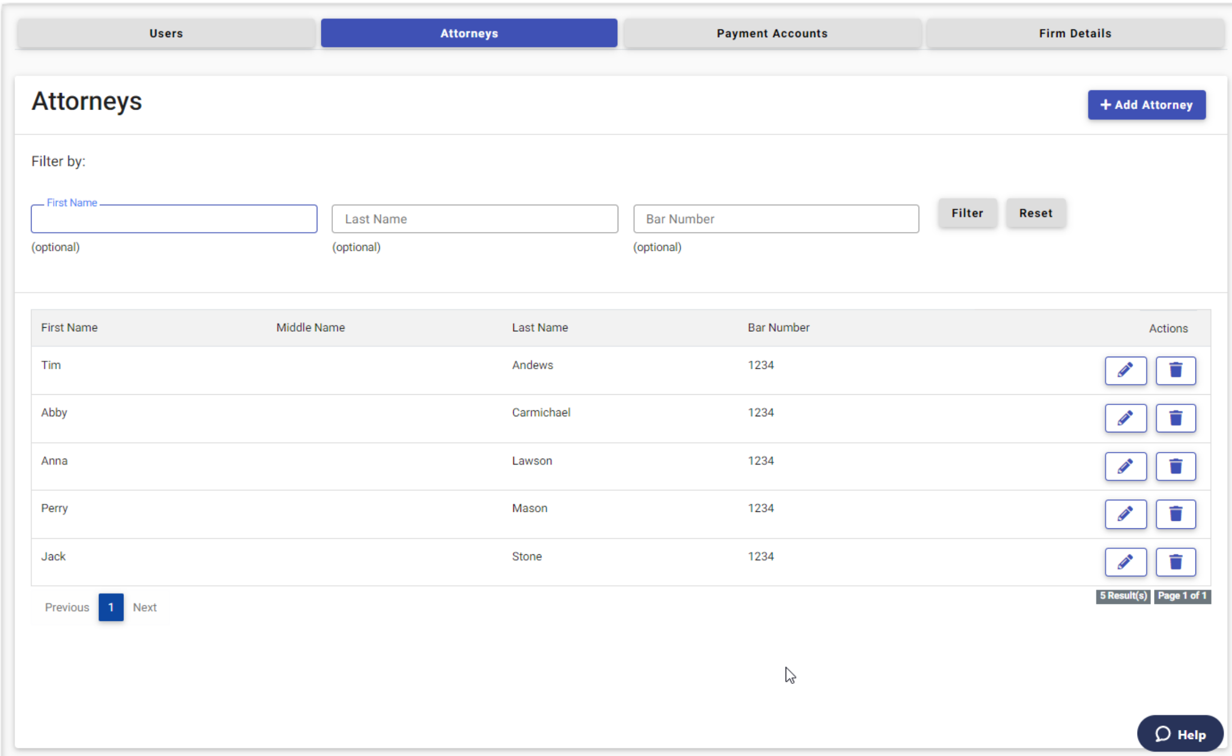
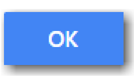
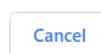


Figure 8.12 – Attorneys Page

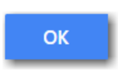
2. Locate the attorney that you want to remove from the firm, and then click .

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

3. Click 

to remove the attorney from the firm, or click 

to cancel the action.

   If you clicked 

, a confirmation message is displayed, and the attorney is removed from the firm.

9 Payment Accounts

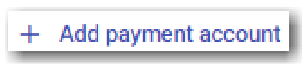
Topics covered in this chapter

♦ Adding a Waiver Payment Account
♦ Adding a Credit Card Payment Account
♦ Adding an E-Check Payment Account
♦ Adding a Draw-Down 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, click 

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.

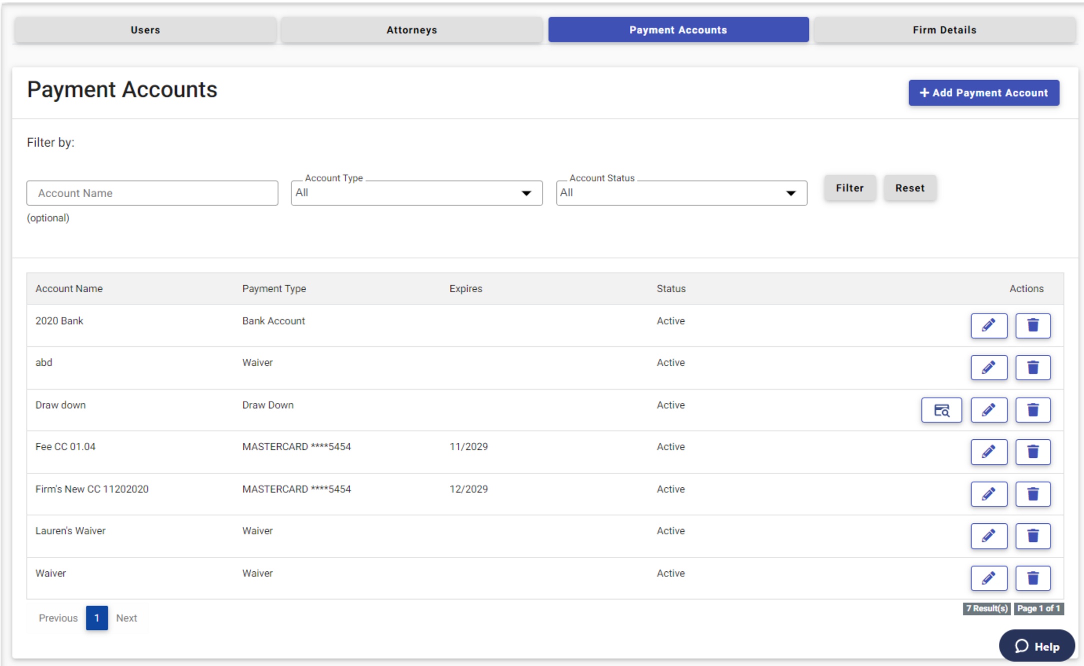


Figure 9.1 – Payment Accounts Page

2. Click  .

A new pane is displayed.

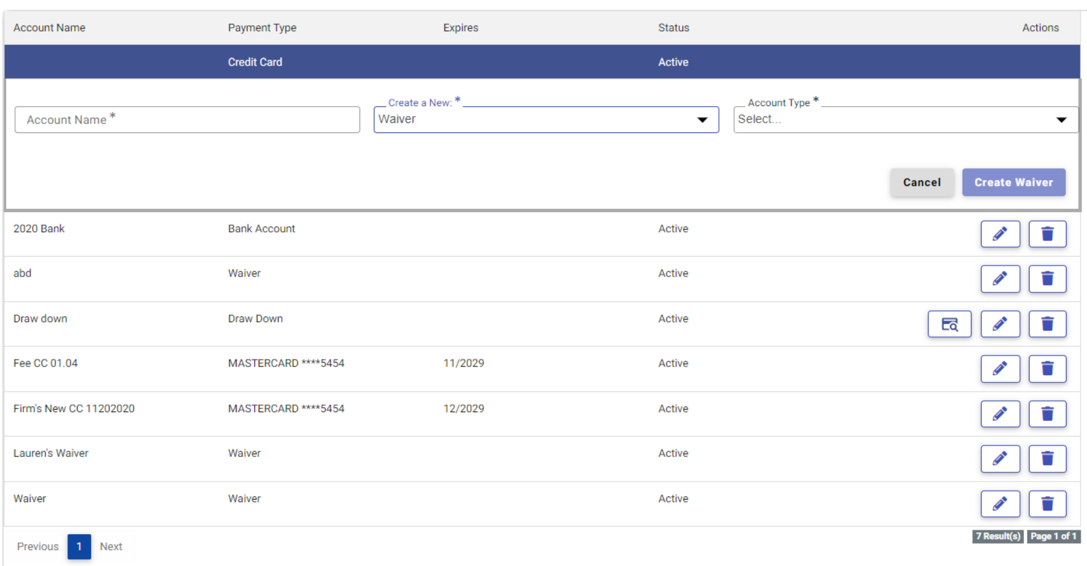


Figure 9.2 – New Payment Account Pane

3. Type a name for the payment account in the **Account Name** field.
4. Select **Waiver** from the **Create a New** drop-down list.

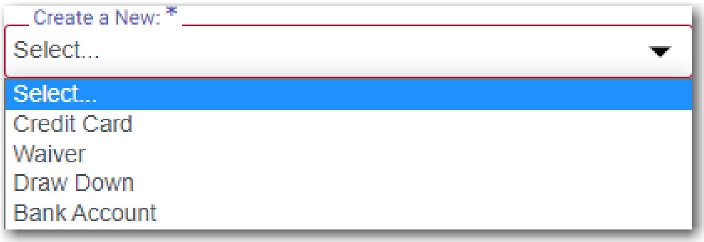


Figure 9.3 – Create a New Drop-Down List

5. Select **Waiver** from the **Account Type** drop-down list.

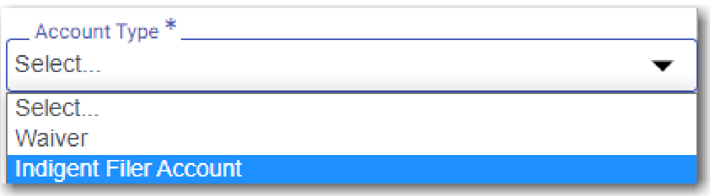


Figure 9.4 – Account Type Drop-Down List for Waivers

6. 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.

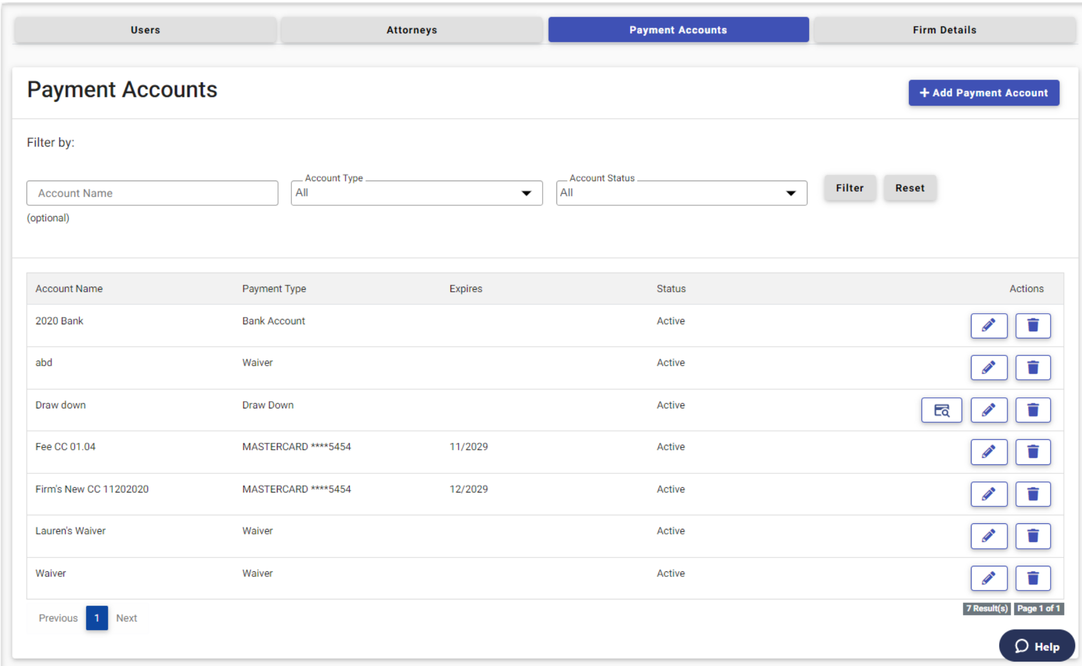


Figure 9.5 – Payment Accounts Page

2. Click 

.

   A new pane is displayed.

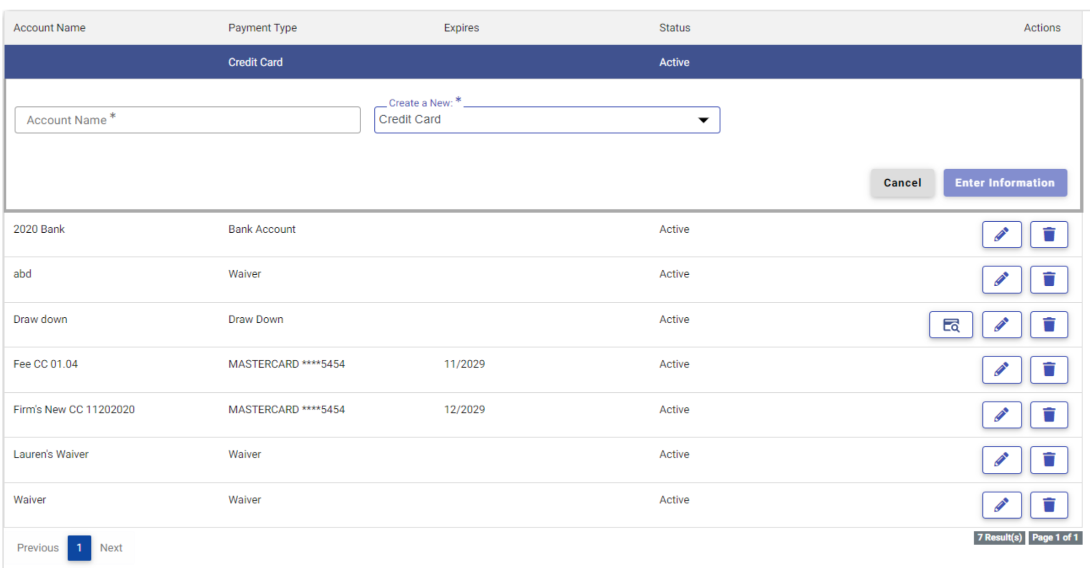


Figure 9.6 – New Payment Account Pane

3. Type a name for the payment account in the **Account Name** field.
4. Select **Credit Card** from the **Create a New** drop-down list.

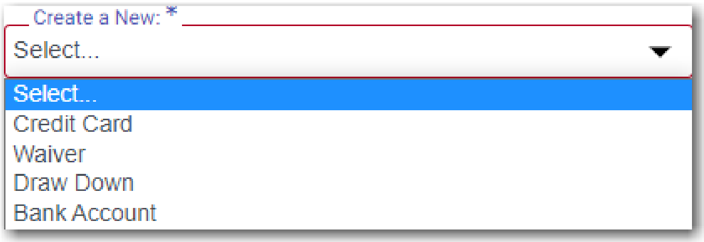


Figure 9.7 – Create a New Drop-Down List

5. Click **Enter Information**.

   The *Enter Information* window is displayed.

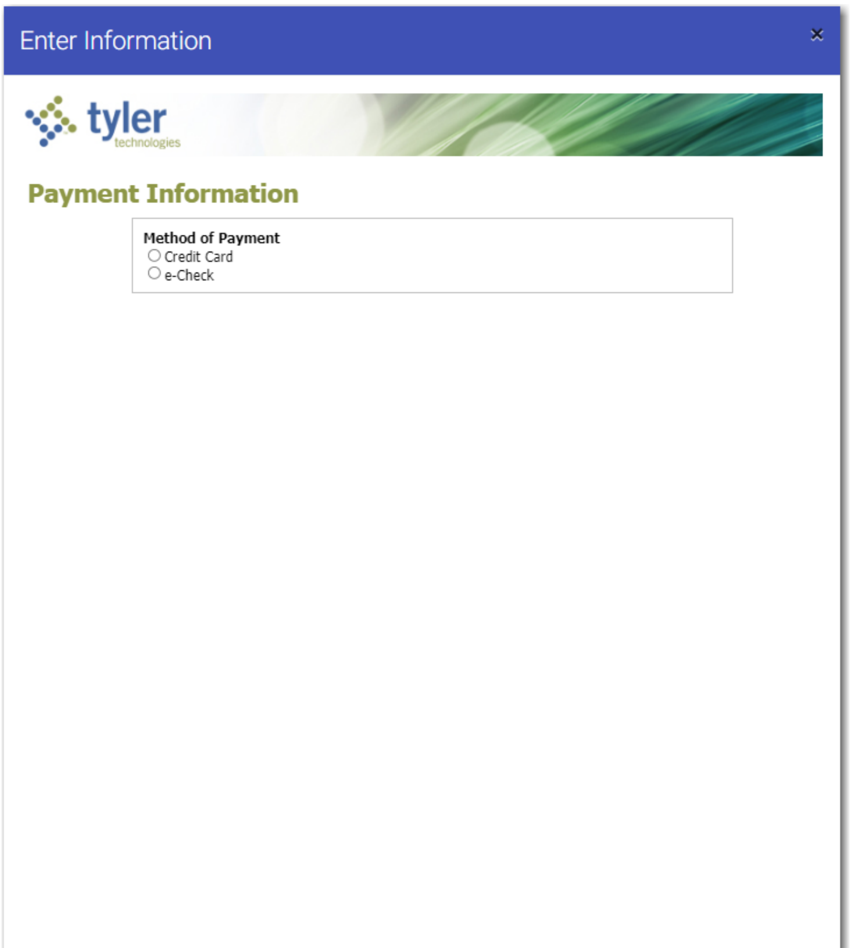


Figure 9.8 – Enter Information Window

6. Select **Credit Card**.

   The Payment Information pane is displayed.

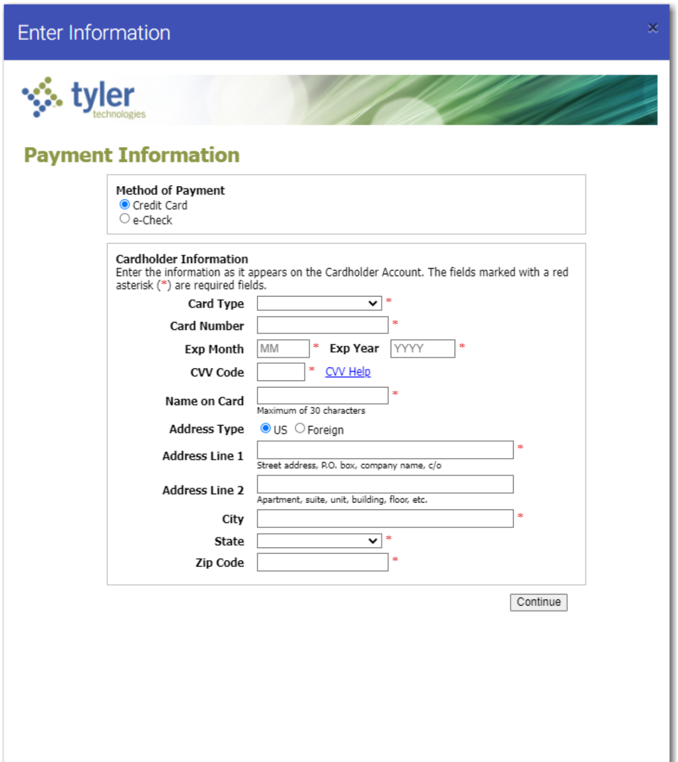


Figure 9.9 – Payment Information Pane

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

.

    The Verify Billing Information pane is displayed.

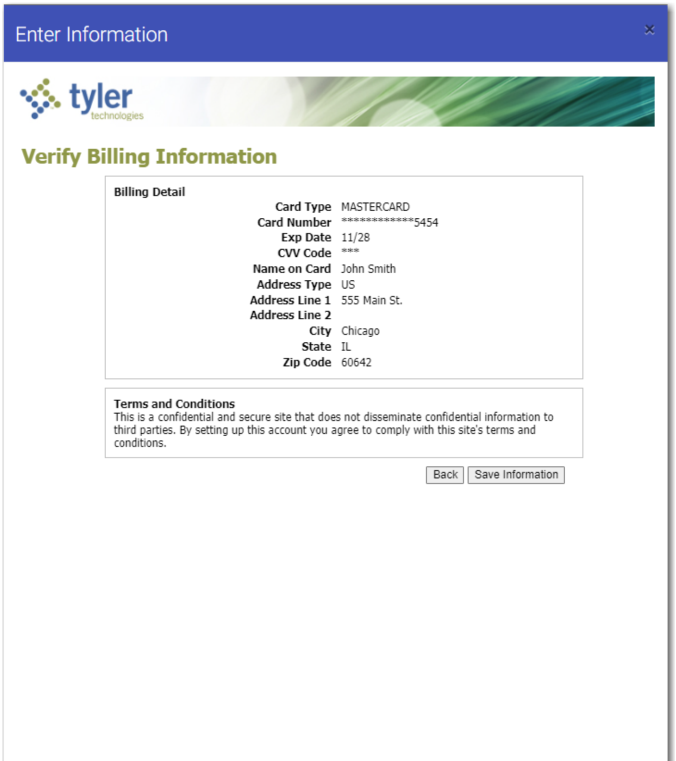


Figure 9.10 – Verify Billing Information Pane

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

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

Adding an E-Check Payment Account

To set up an e-check payment account:

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

   The *Payment Accounts* page is displayed.

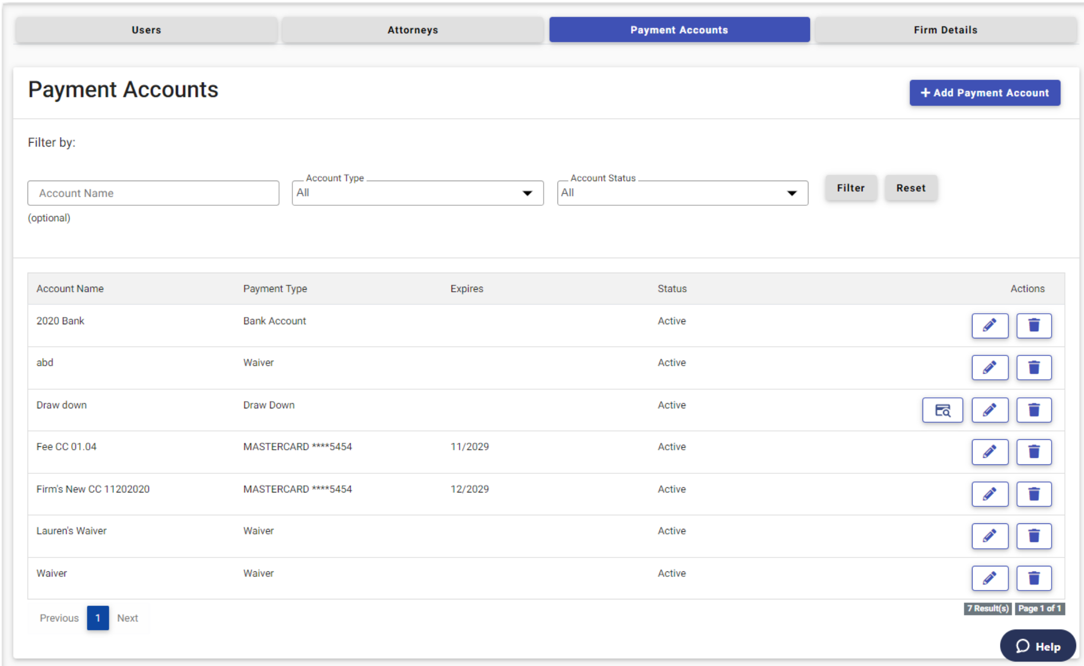


Figure 9.11 – Payment Accounts Page

2. Click .

   A new pane is displayed.

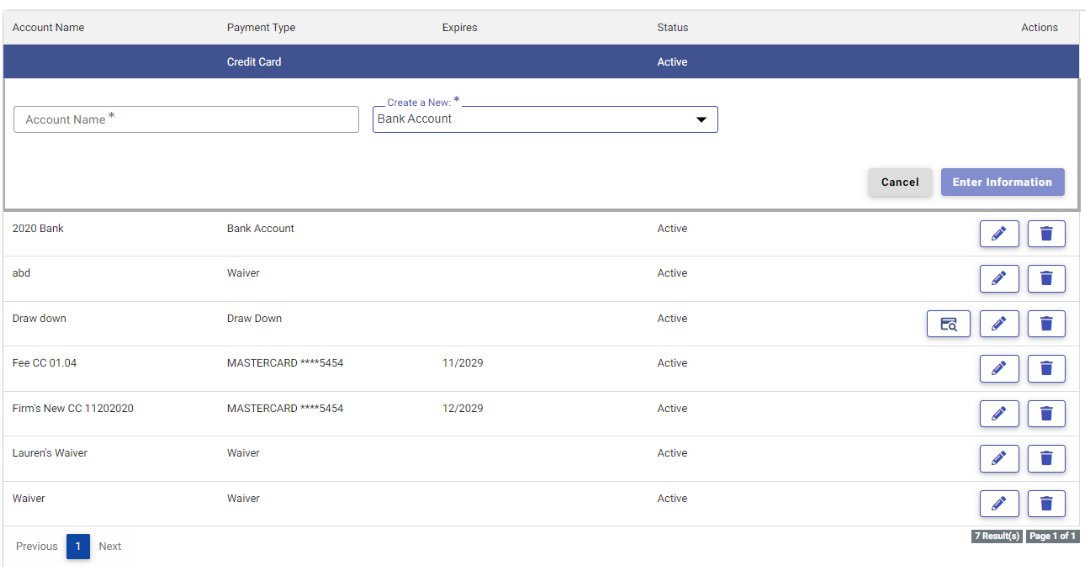


Figure 9.12 – New Payment Account Pane

3. Type a name for the payment account in the **Account Name** field.
4. Select **Bank Account** from the **Create a New** drop-down list.

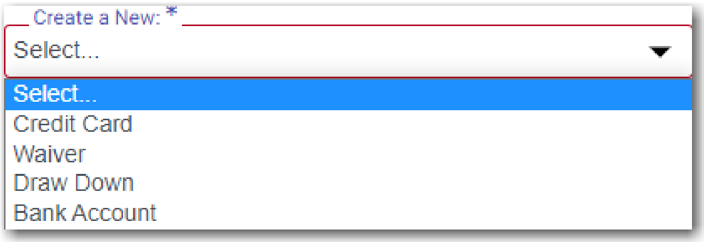


Figure 9.13 – Create a New Drop-Down List

5. Click 

.

   The *Enter Information* window is displayed.

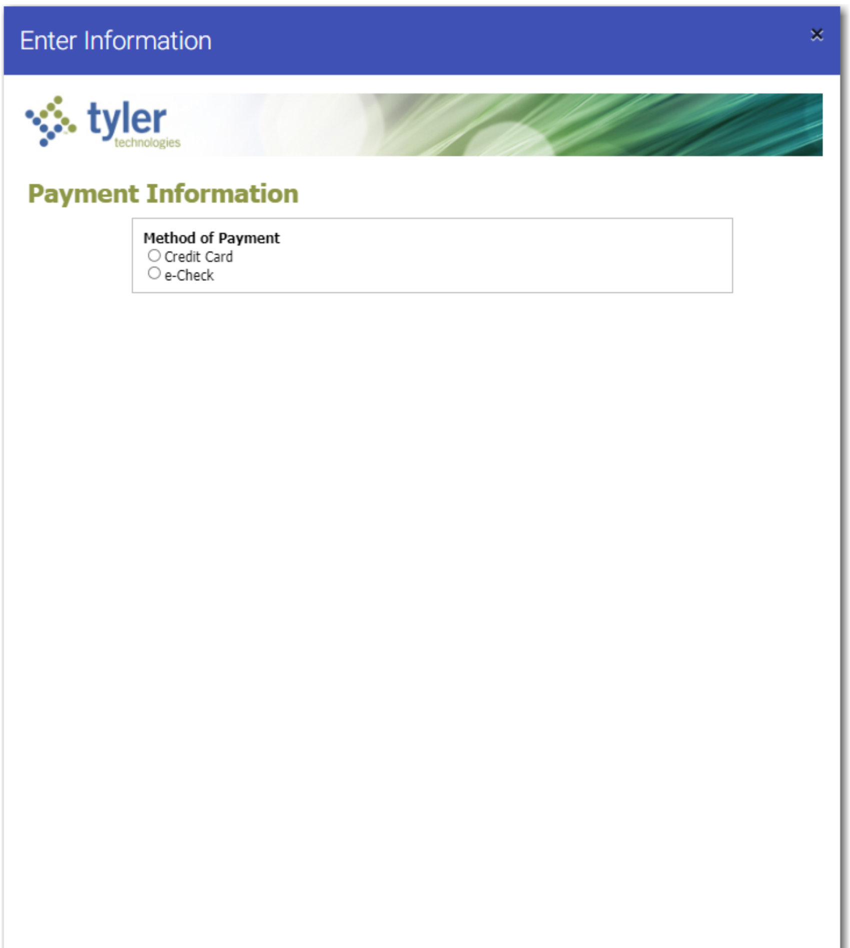


Figure 9.14 – Enter Information Window

6. Select **e-Check**.

   The Payment Information pane is displayed.

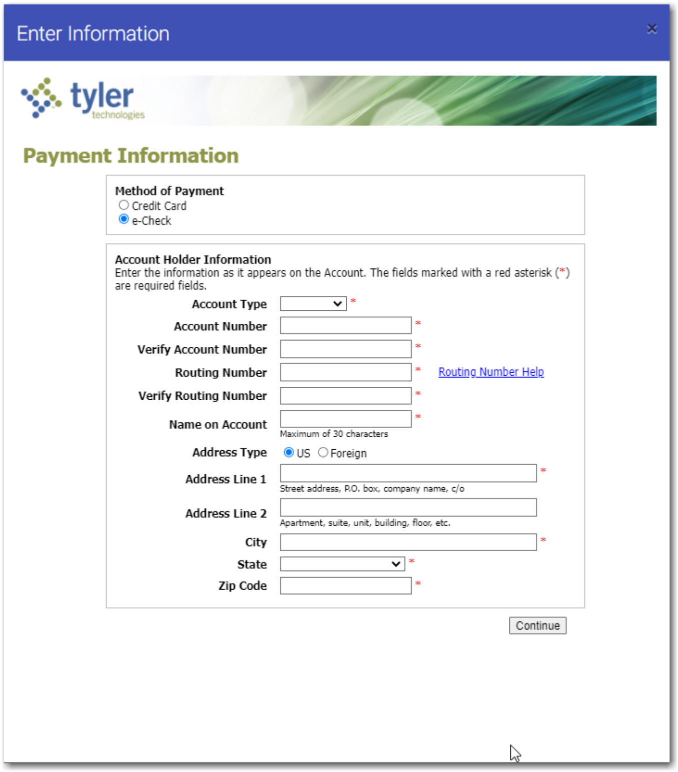


Figure 9.15 – Payment Information Pane

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

.

    The Verify Billing Information pane is displayed.

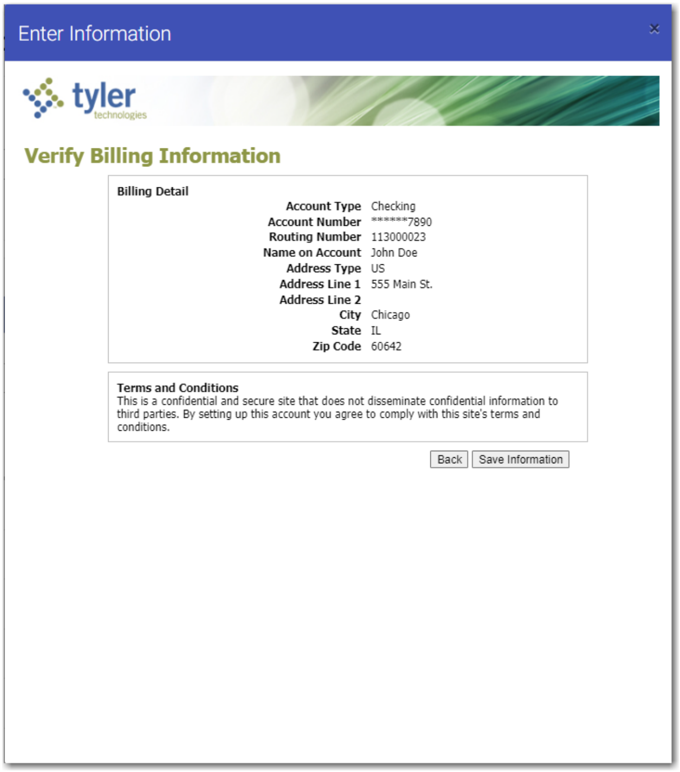


Figure 9.16 – Verify Billing Information Pane

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

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

Adding a Draw-Down Account

You can create a draw-down account on the *Payment Accounts* page for use at a later time, or you can create a draw-down account on the *Fees* page during a case filing.

To add a draw-down account from the *Payment Accounts* page:

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

   The *Payment Accounts* page is displayed.

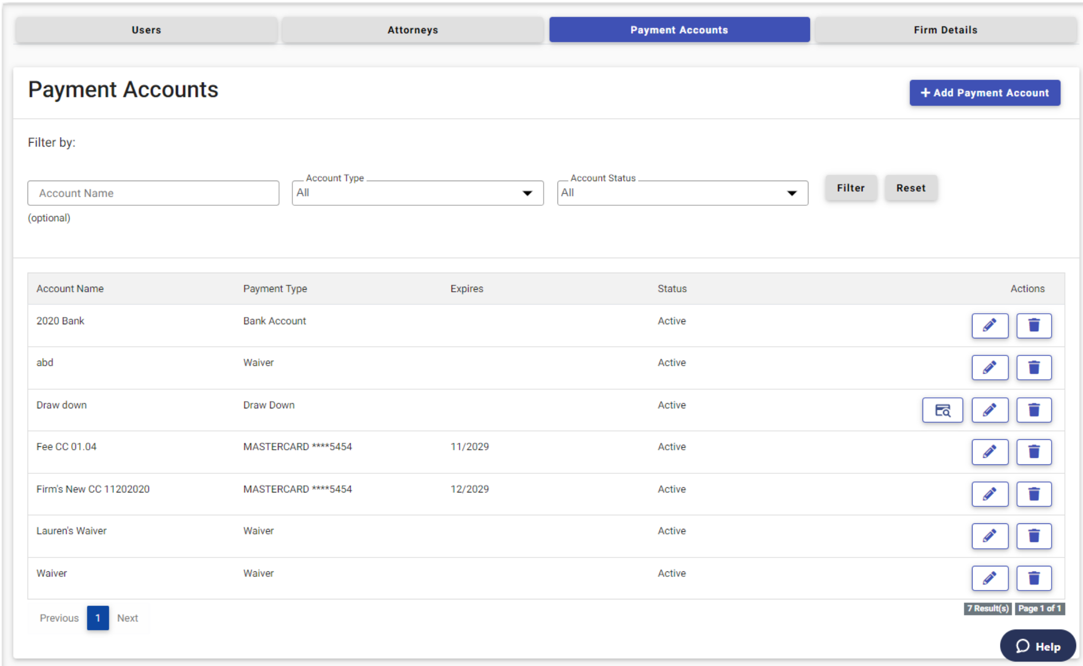


Figure 9.17 – Payment Accounts Page

2. Click **+ Add Payment Account**.

   A new pane is displayed.

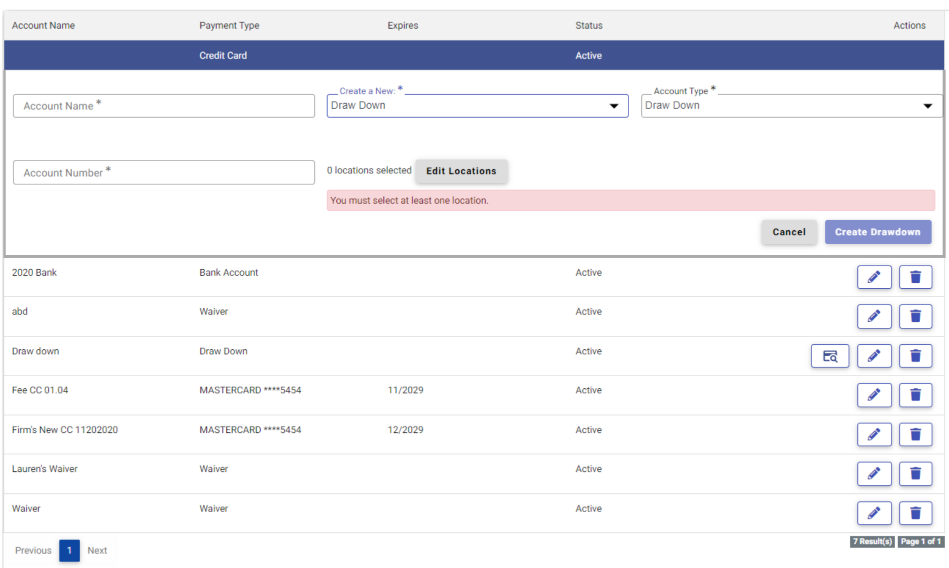


Figure 9.18 – New Payment Account Pane

3. Type a name for the payment account in the **Account Name** field.
4. Select **Draw Down** from the **Create a New** drop-down list.

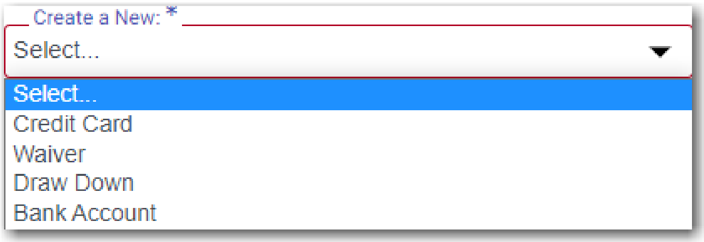


Figure 9.19 – Create a New Drop-Down List

5. Select **Draw Down** from the **Account Type** drop-down list.
6. Type an account number in the **Account Number** field.
7. Click **Edit Locations**.

   The *Edit locations for Draw Down* window is displayed.

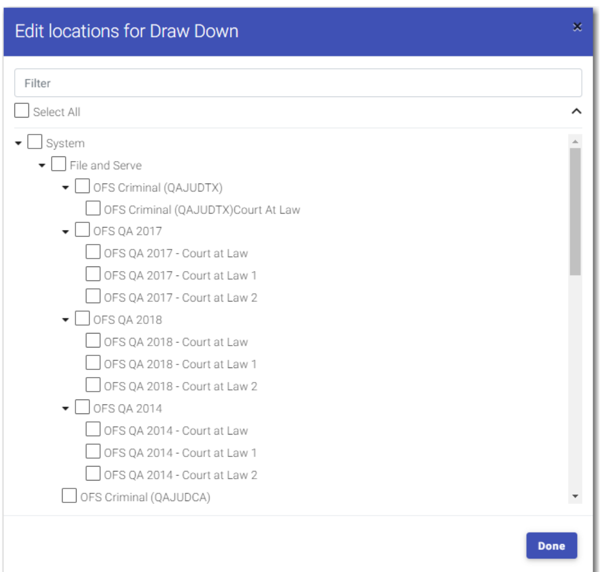


Figure 9.20 – Example of the Edit Locations for Draw Down Window

8. Select the locations where the draw-down account can be used, and then click **Done**.
9. Click **Create Drawdown**.

   The *Balance for Draw down* window is displayed.

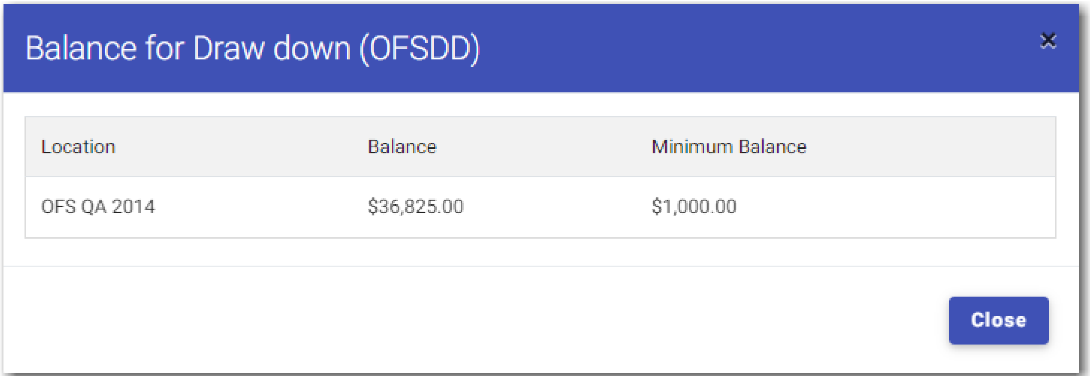


Figure 9.21 – Example of a Balance for Draw Down Window

10. Verify the amount for the location that you selected. Then, click .

    The new 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.

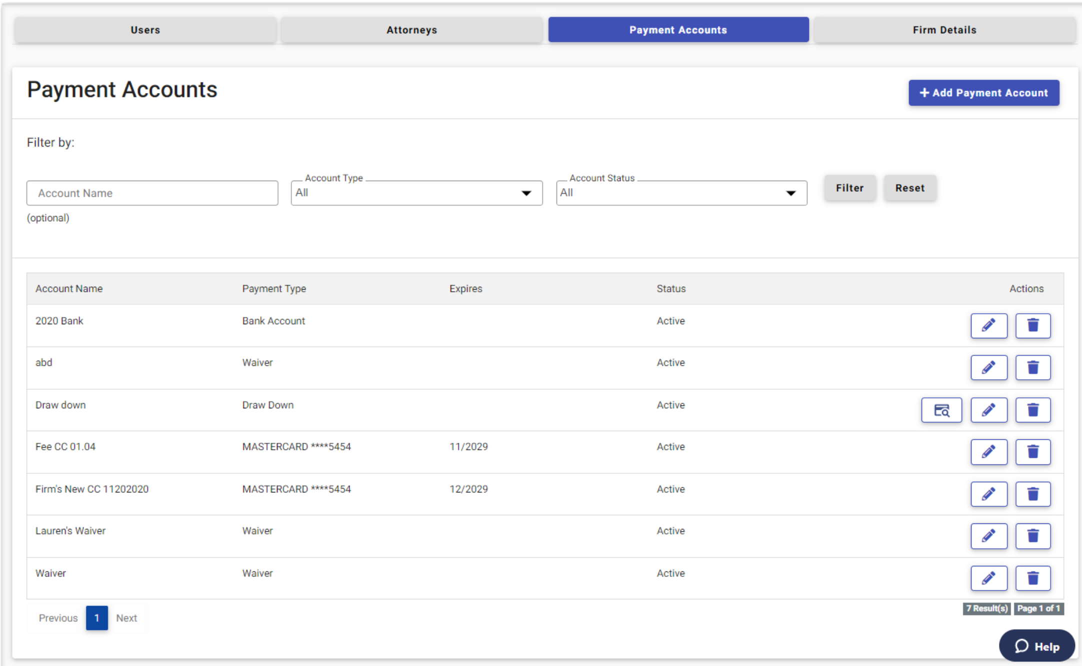


Figure 9.22 – Payment Accounts Page

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 **Active** 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 the Active status, click  , and then select the **Active** check box. Then, click 

.

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

Deleting a Payment Account

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

To delete an existing payment account:

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

   The *Payment Accounts* page is displayed.

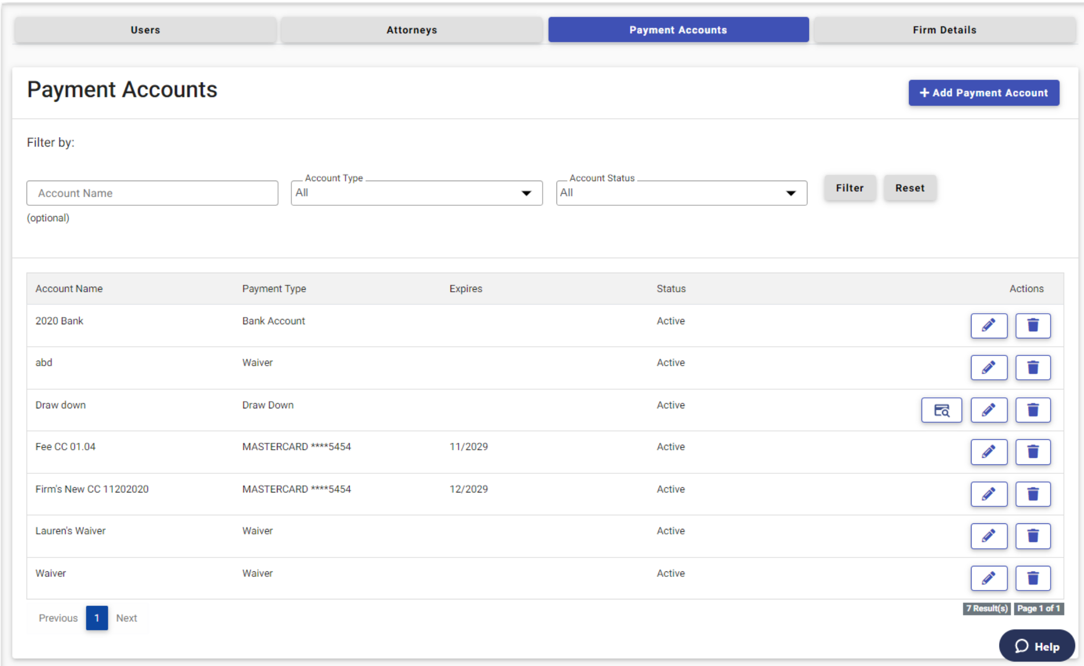
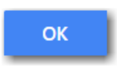
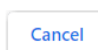


Figure 9.23 – Payment Accounts Page

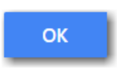
2. Locate the payment account that you want to delete, and then click  .

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

3. Click 

to delete the account, or click 

to cancel the action.

   If you clicked 

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

10 Case Initiation

Topics covered in this chapter

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

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

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

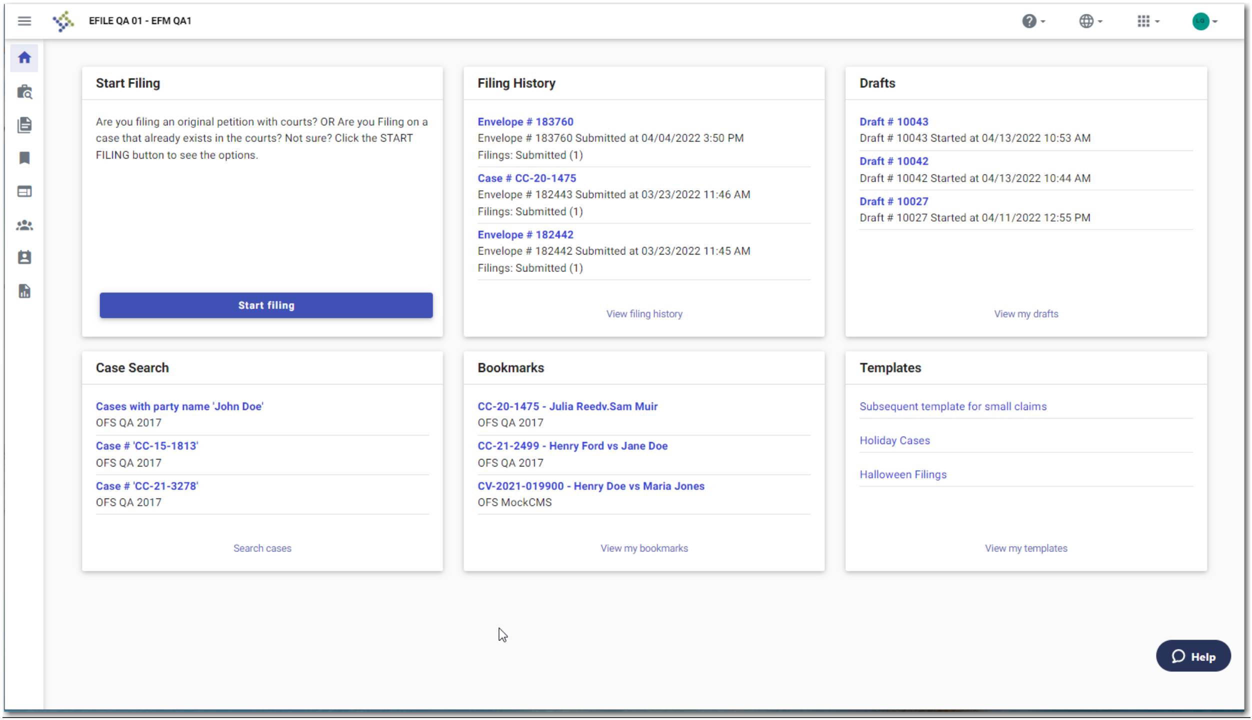
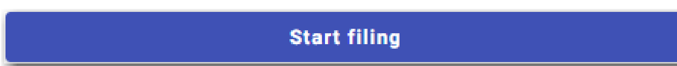


Figure 10.1 – Dashboard Page

Starting a New Case Filing

Start a new case filing from the *Dashboard* page.

To start a new case filing:

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

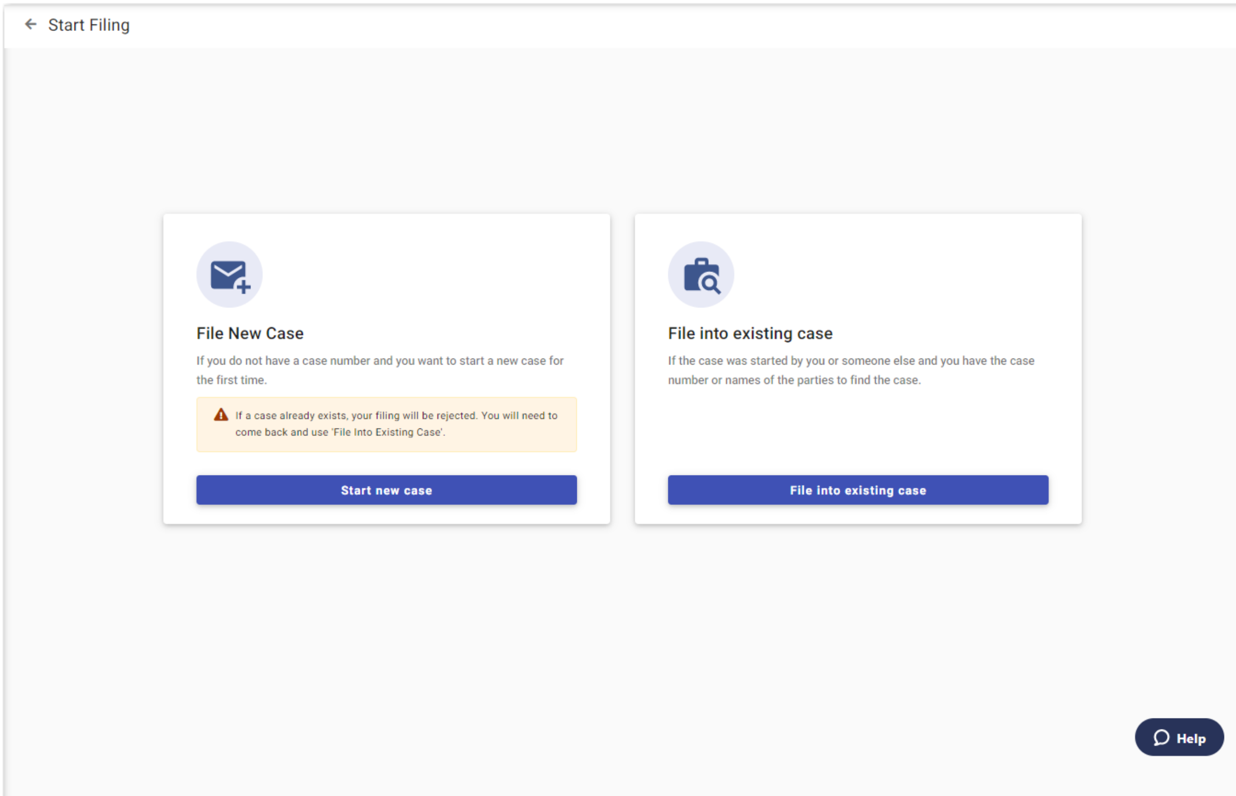


Figure 10.2 – Start Filing Page

2. Click 

.

   The *Case Information* page is displayed.

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.

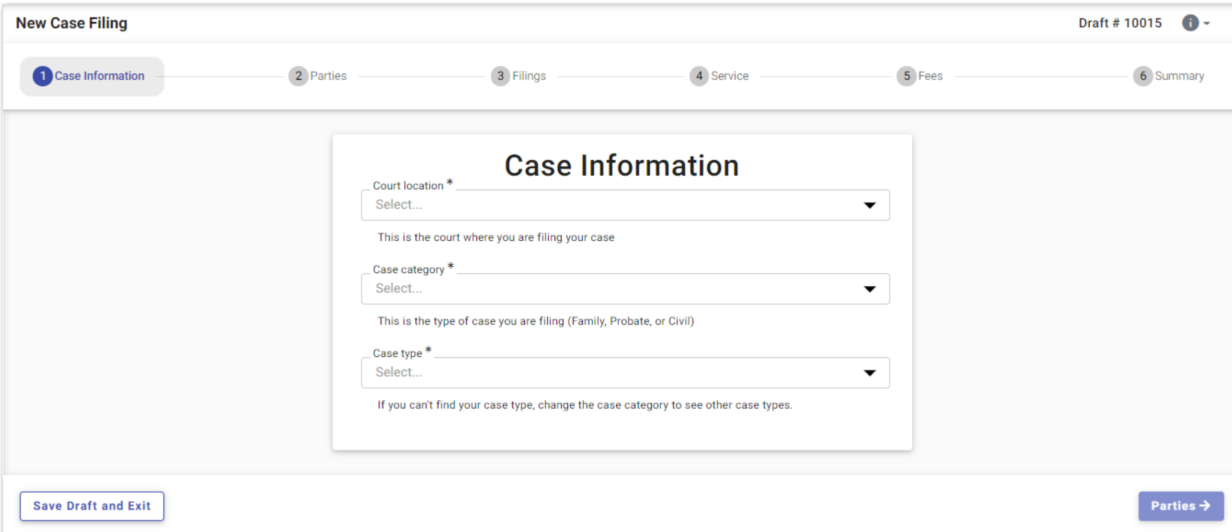


Figure 10.3 – Case Information Page

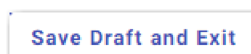
Note: While you are entering a case filing, click  **to view the case number or draft number.**

To enter case information:

1. On the *Case Information* page, select the location from the **Court 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. Select the case subtype, if applicable, from the **Case Sub Type** drop-down list.

   Note: The Case Sub Type field is configured by Tyler and may not be available on your system.

5. Click 

 to save your work and continue, or click 

 to save your filing and continue it at another time.

Adding Envelope Level Comments to a Case Filing

You can add envelope level comments on the *Case Information* page during filing creation. The comments are then displayed on the *Summary* page, in the print preview, and in the envelope details.

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

To add envelope level comments to a case filing:

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

2. Click 

.

The *Case Information* page is displayed.

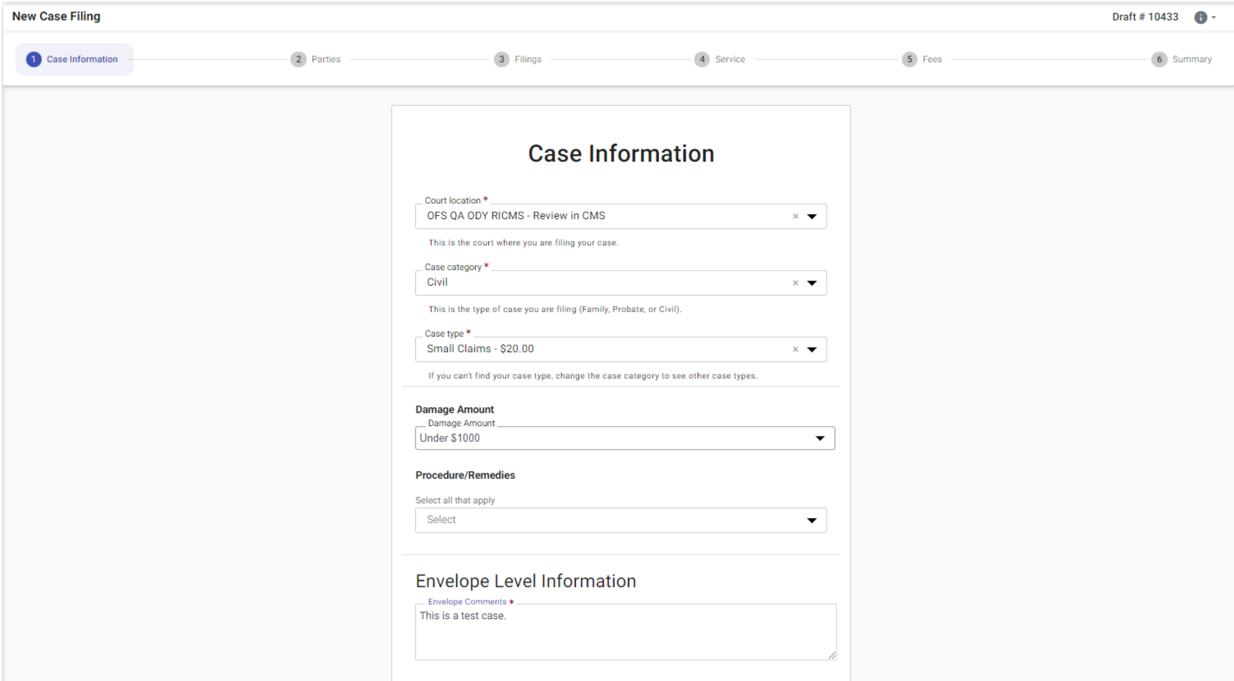


Figure 10.4 – Example of a Case Information Page

3. Select the location from the **Court Location** drop-down list.
4. Select the case category from the **Case Category** drop-down list.
5. Select the case type from the **Case Type** drop-down list.
6. Select the amount of damages you are seeking from the **Damage Amount** drop-down list.

   Note: The Damage Amount feature is configured by Tyler and may not be available on your system.
7. Select the appropriate procedures or remedies from the **Procedure/Remedies** drop-down list.

   Note: The Procedure/Remedies feature is configured by Tyler and may not be available on your system.
8. In the Envelope Level Information pane, in the **Envelope Comments** field, type the comments that you want to attach to the case filing.
9. Click 

 to continue with your case filing.

Collecting Address Information at the Case Level

When filers create certain types of cases, they can provide address information in the case filing.

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

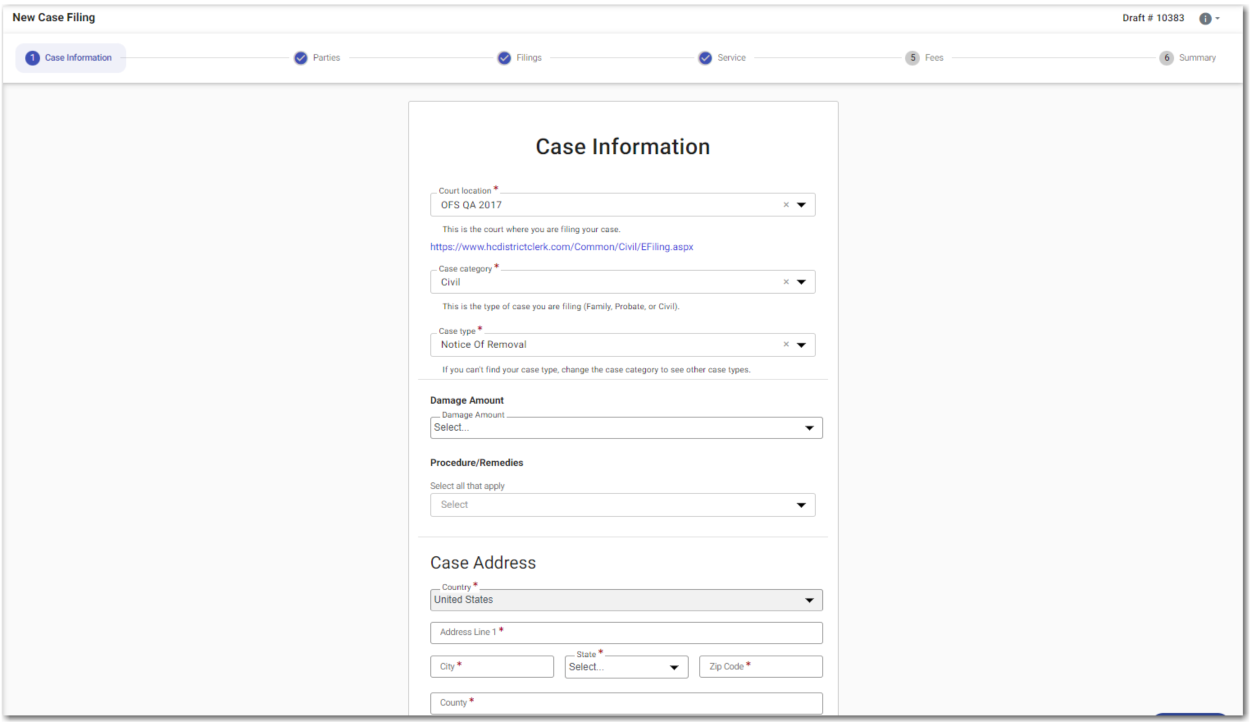


Figure 10.5 – Example of a Case Information Page—Blank Case Address Pane

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 location from the **Court 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. In the Case Address pane, complete all of the required address fields.

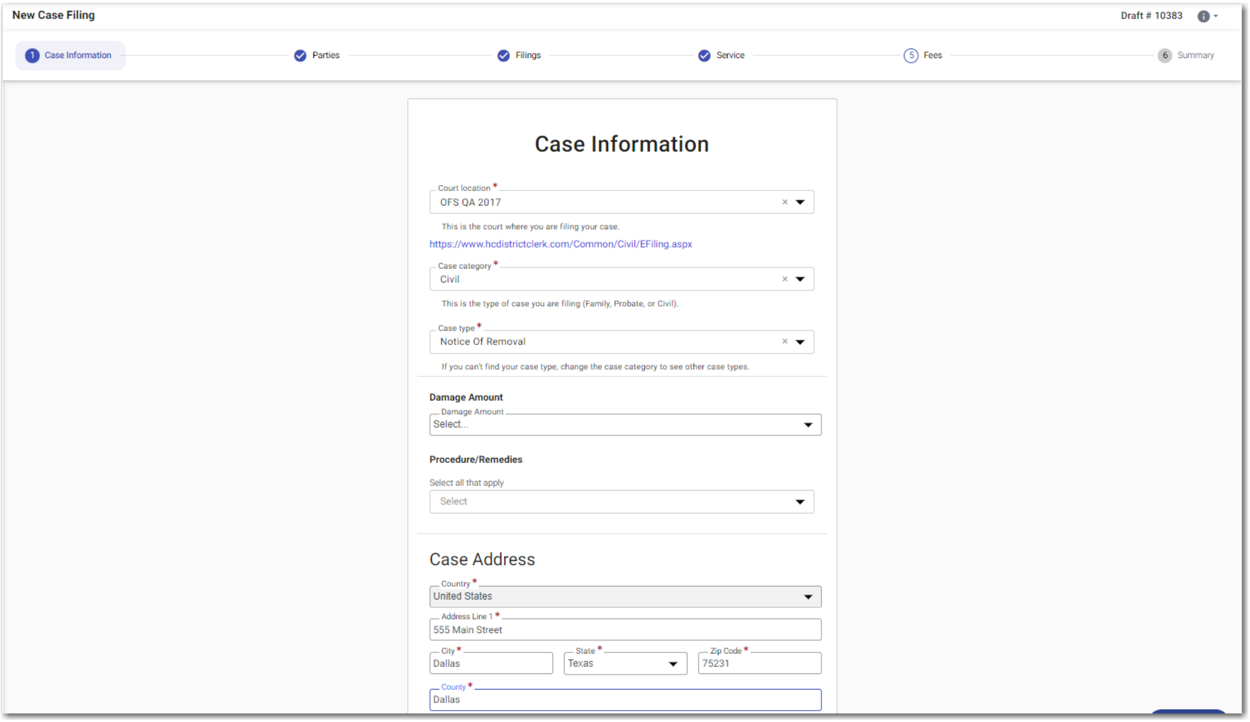
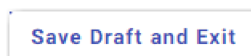


Figure 10.6 – Example of a Case Information Page—Completed Case Address Pane

5. Click 

to save your work and continue, or click 

to save your work and exit the filing.

Entering Case Information for a Civil Case

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

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

To enter case information:

1. Select the location from the **Court Location** drop-down list.
2. Select **Civil** from the **Case Category** drop-down list.

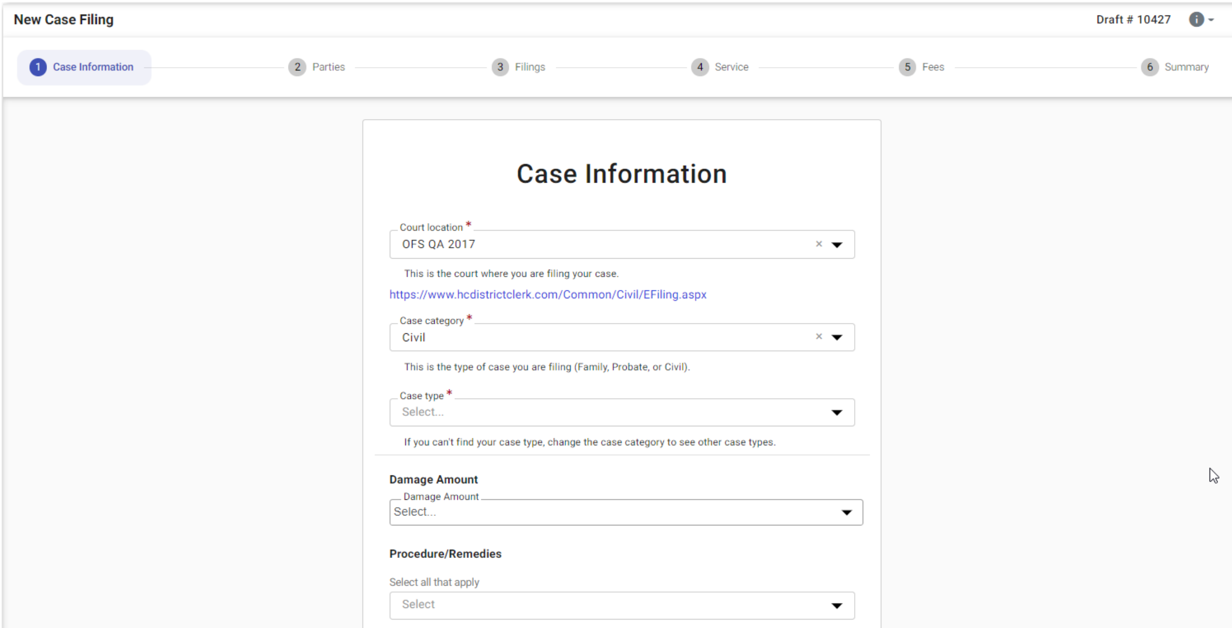


Figure 10.7 – Example of a Case Information Page

3. Select the case type from the **Case Type** drop-down list.
4. Select the amount of damages you are seeking from the **Damage Amount** drop-down list.
5. Select the appropriate procedures or remedies from the **Procedure/Remedies** drop-down list.

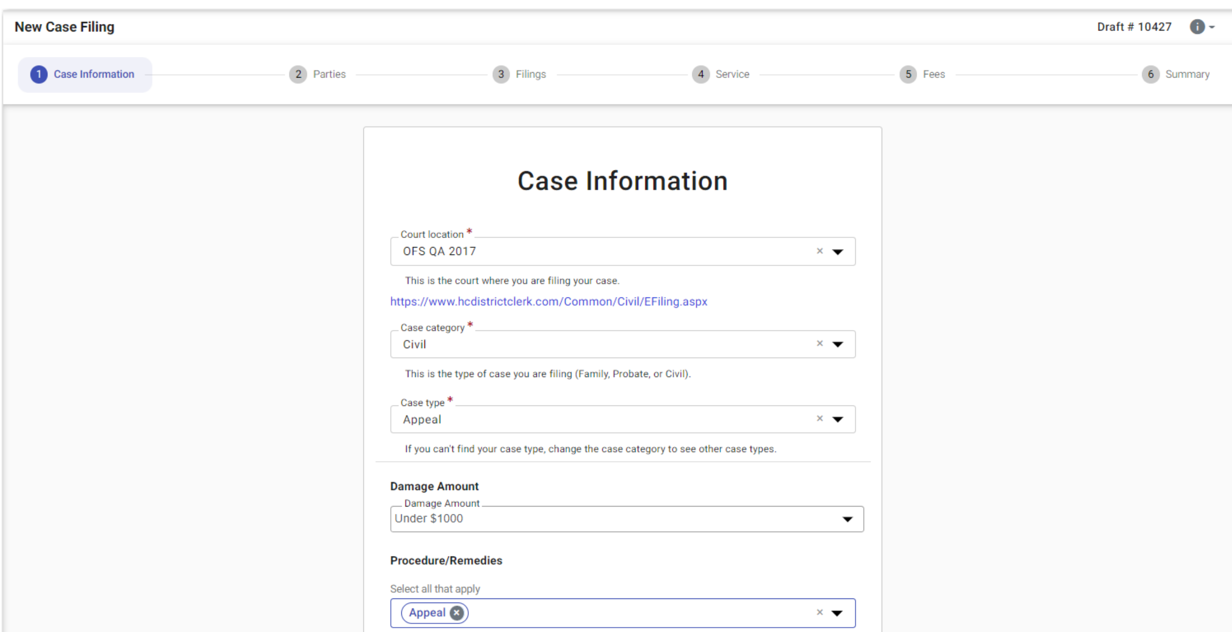


Figure 10.8 – Example of a Completed Case Information Page

6. Click **Parties →** to save your work and continue, or click **Save Draft and Exit** to save your work and exit the filing.

Filing a New Case with Case Cross References

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

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

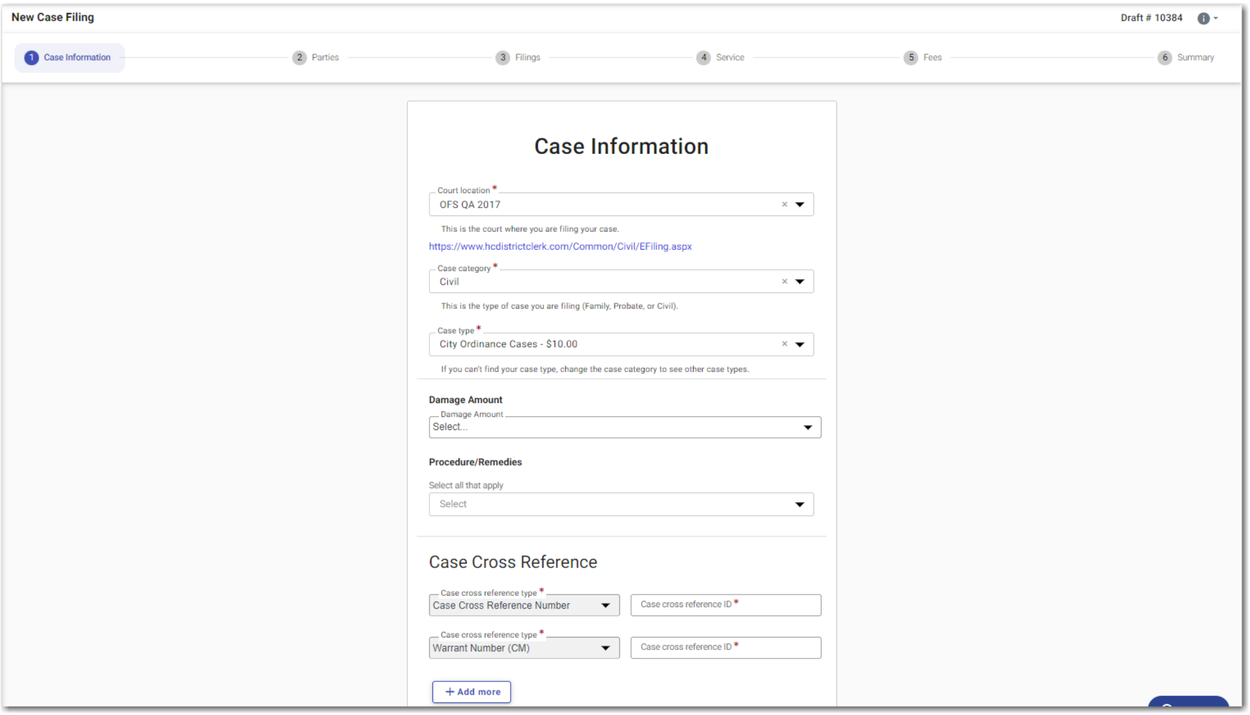
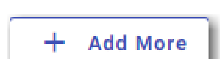


Figure 10.9 – Example of a Case Information Page with the Case Cross Reference Section Displayed

To file a new case that uses case cross references:

1. Select the location from the **Court Location** drop-down list.
2. Select **Civil** from the **Case Category** drop-down list.
3. Select the appropriate case type from the **Case Type** drop-down list.
4. Select the case subtype, if applicable, from the **Case Sub Type** drop-down list.
5. Select the damages amount, if applicable, from the **Damage Amount** drop-down list.
6. In the Case Cross Reference pane, type the case cross reference number in the **Case cross reference Id** field.

   Note: Some case cross reference types require a six-digit number. Other types may require a four-digit number.

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

.

   Another row for case cross references is displayed.

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

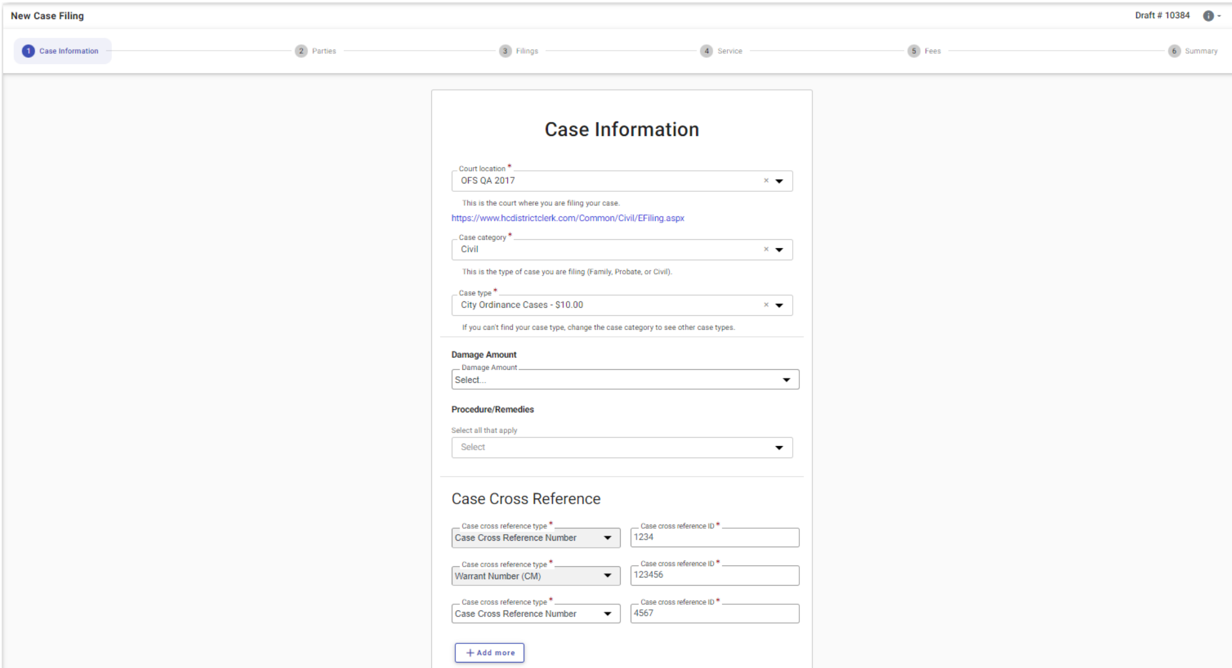
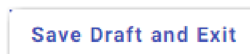


Figure 10.10 – Example of a Case Information Page with Case Cross Reference Numbers Added

9. Click 

 to save your work and continue, or click 

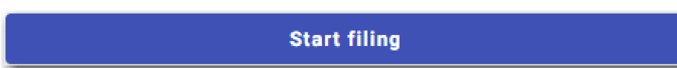
 to save your work and exit the filing.

Filing a New Case with a Will Filed Date

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

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

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

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

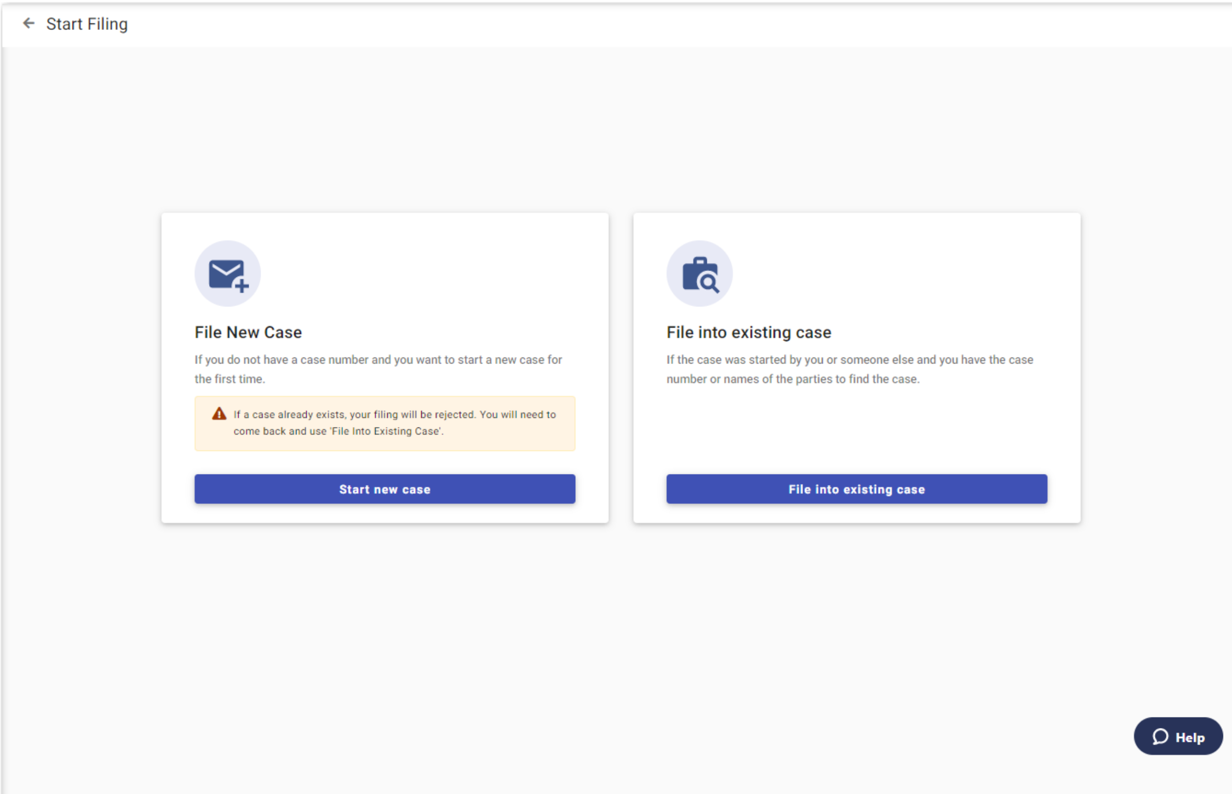


Figure 10.11 – Start Filing Page

2. Click 

.

   The *Case Information* page is displayed.

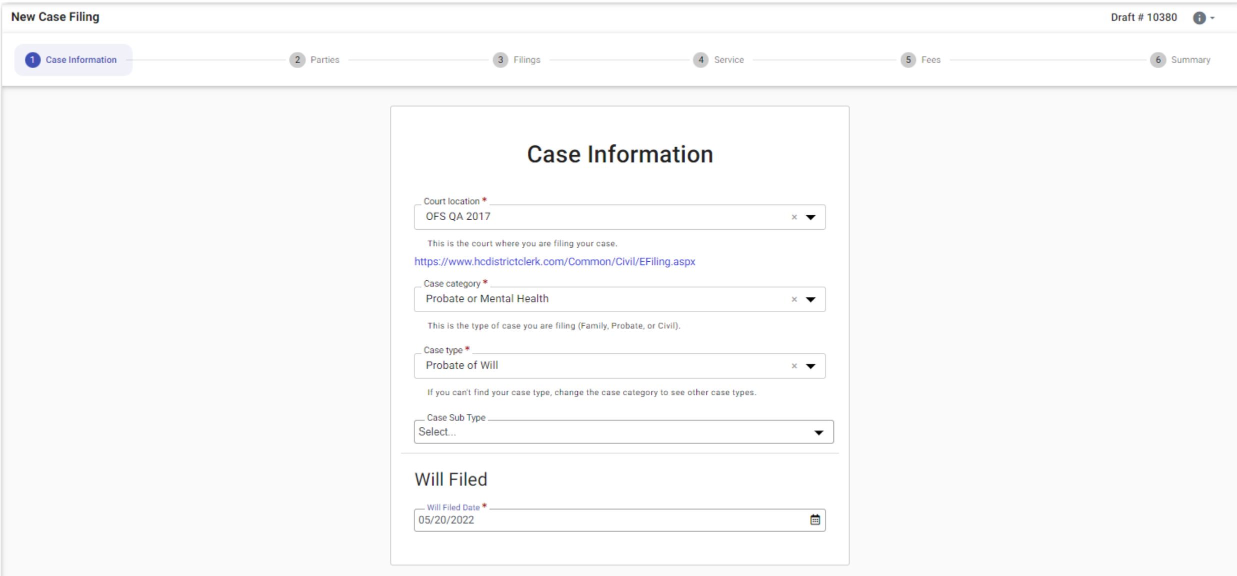


Figure 10.12 – Example of the Will Filed Field on the Case Information Page

3. Select the location from the **Court Location** drop-down list.
4. Select the category from the **Case Category** drop-down list.

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

5. 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.

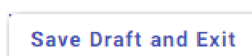
6. Select the case subtype from the **Case Sub Type** drop-down list.

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

7. 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.

8. Click 

to save your work and continue, or click 

to save your work and exit the filing.

Entering Party Details

Each case requires a party type.

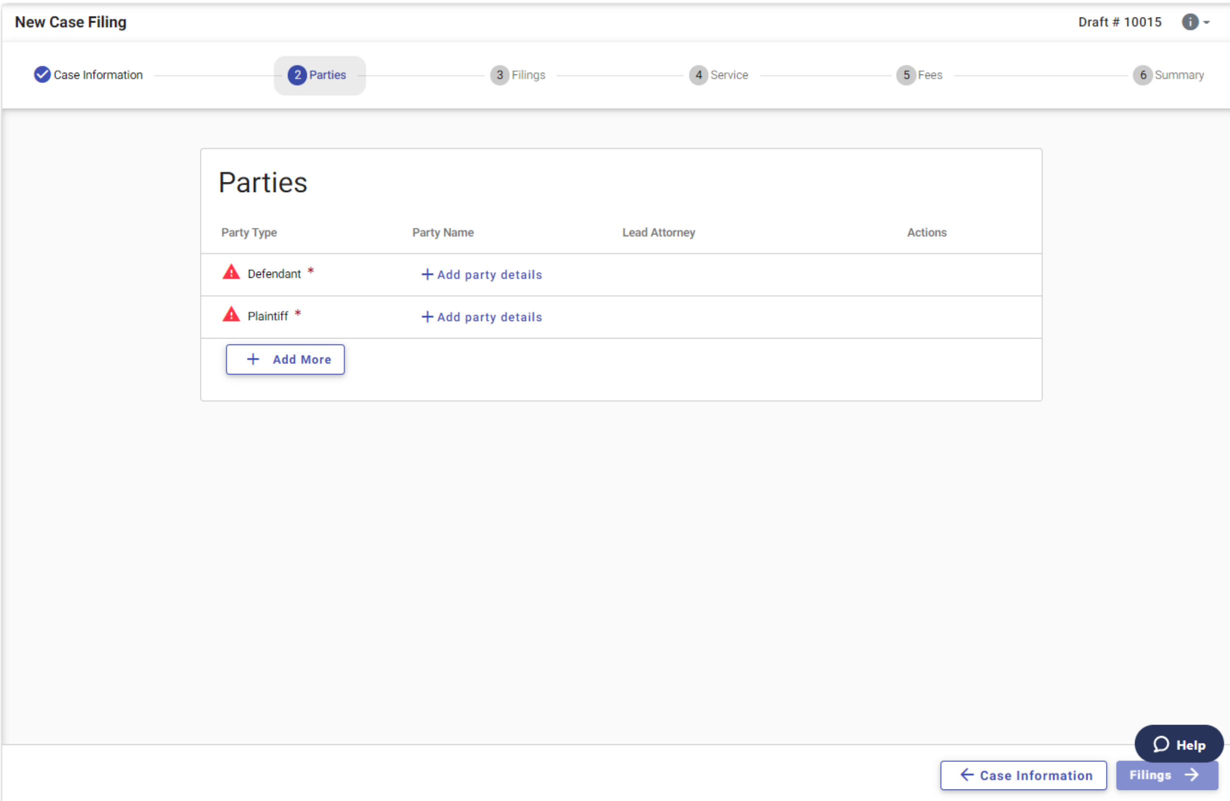


Figure 10.13 – Example of a Parties Page

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

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

1. On the *Parties* page, select the party type that you want to begin to describe, and then click **+ Add party details**.

   The *Edit Party Details* window for the specified party is displayed.

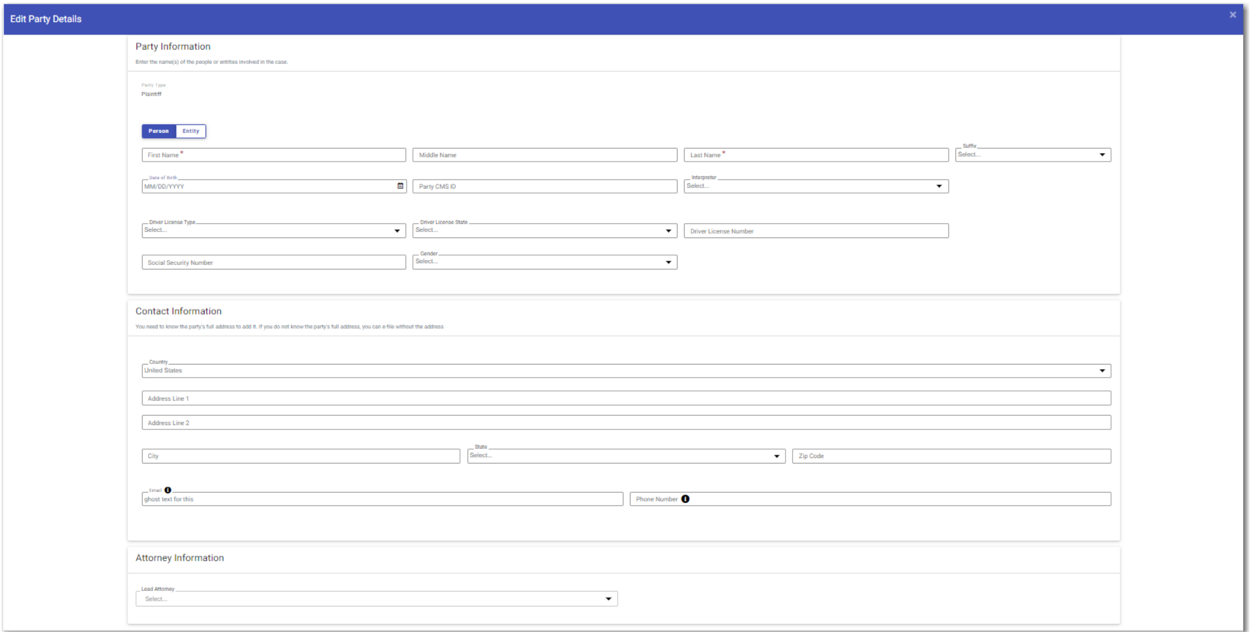
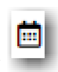


Figure 10.14 – Example of the Edit Party Details Window

2. Click either **Person** or **Entity**.

   Note: The following steps describe the fields that are displayed if you select "Person."

3. In the Party Information pane, 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.
4. Type the party's date of birth in the **Date of Birth** field, or click  to select the date from the calendar.
5. Type the party case management system identification (ID) in the **Party CMS ID** field, if appropriate.
6. Select a language from the **Interpreter** drop-down list, if appropriate.
7. Select the type of driver's license from the **Drivers License Type** drop-down list.
8. Select the state where the driver's license was issued from the **Drivers License State** drop-down list.
9. Type the party's driver's license number in the **Drivers License Number** field.
10. 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.

11. Select the party's gender from the **Gender** drop-down list.
12. In the Contact Information pane, enter the country, address, city, state, ZIP code, and phone number for the specified party.
13. In the Attorney Information pane, from the **Lead Attorney** drop-down list, select the filing attorney.
14. From the next field that is displayed, select additional attorneys, if any, that you want to add to the case.
15. After all of the required fields for the specified party are completed, click **Save**.
16. On the *Parties* page, complete the party information for the next party.

17. If you have another party to add to the case, click **+ Add More**, and complete the party information for the additional party. Continue to add parties until all of the parties have been added to the case.

18. Click **Filings →** to save your work and continue.

Entering Date of Death on the Parties Page

You can enter the date of death for a party when the Date of Death 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.

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

1. On the *Dashboard* page, click **Start filing**.

   The *Start Filing* page is displayed.

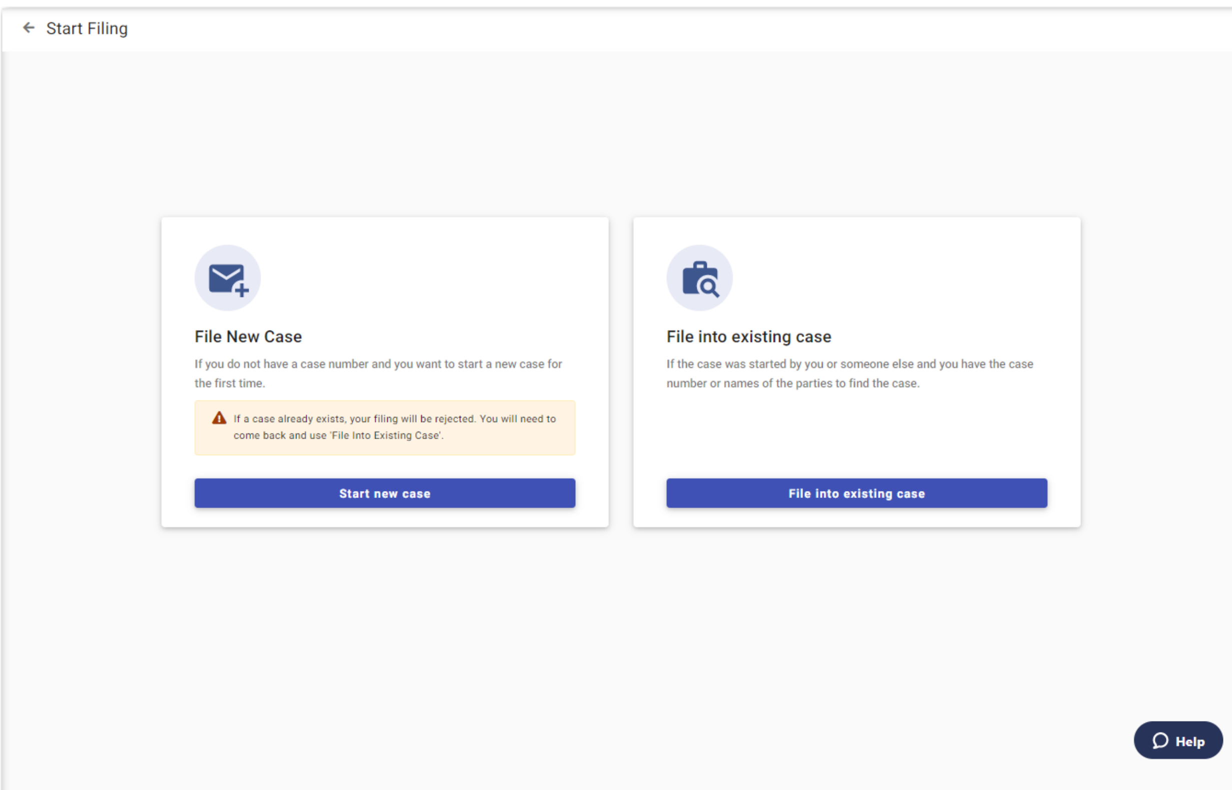


Figure 10.15 – Start Filing Page

2. Click **Start new case**.

The *Case Information* page is displayed.

3. Complete the required sections on the *Case Information* page, and then click 

.

   The *Parties* page is displayed.

4. On the *Parties* page, select the party type that you want to begin to describe, and then click 

.

   The *Edit Party Details* window for the specified party is displayed.

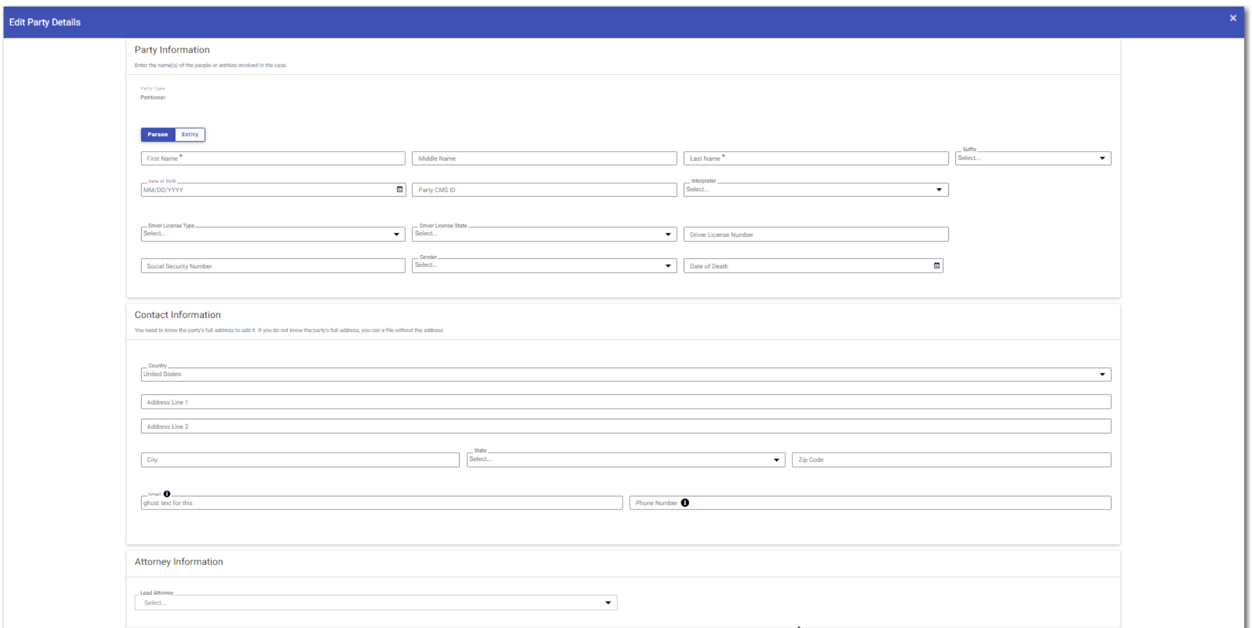


Figure 10.16 – Example of the Edit Party Details Window

5. Click either 

or 

.

   Note: The following steps describe the fields that are displayed if you select "Person."

   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.

6. In the Party Information pane, 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.

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

8. Type the party case management system identification (ID) in the **Party CMS ID** field, if appropriate.

9. Select a language from the **Interpreter** drop-down list, if appropriate.

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. Select the deceased party's gender from the **Gender** drop-down list.

15. Type the deceased party's date of death in the **Date of Death** field, or click  to select a date from the calendar.

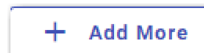
16. In the Contact Information pane, enter the country, address, city, state, ZIP code, and phone number for the specified party.

17. In the Attorney Information pane, from the **Lead Attorney** drop-down list, select the filing attorney.

18. From the next field that is displayed, select additional attorneys, if any, that you want to add to the case.

19. After all of the required fields for the specified party are completed, click 

.

20. On the *Parties* page, if you have another party to add to the case, click 

. Then, complete the party information for the next party.

21. Continue to add parties until all of the parties have been added to the case.

22. Click 

to save your work and continue.

Entering Filing Details

You can enter the filing details on the *Filings* page.

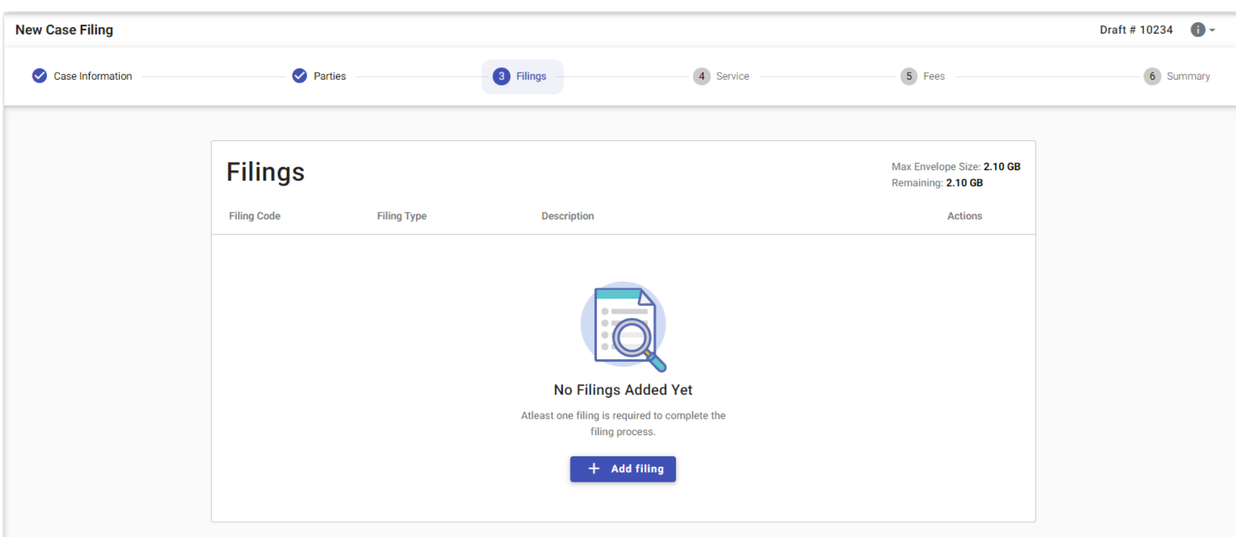


Figure 10.17 – Filings Page

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

To enter the filing details:

1. On the *Filings* page, click 

.

   The *Edit Filing Details* page is displayed.

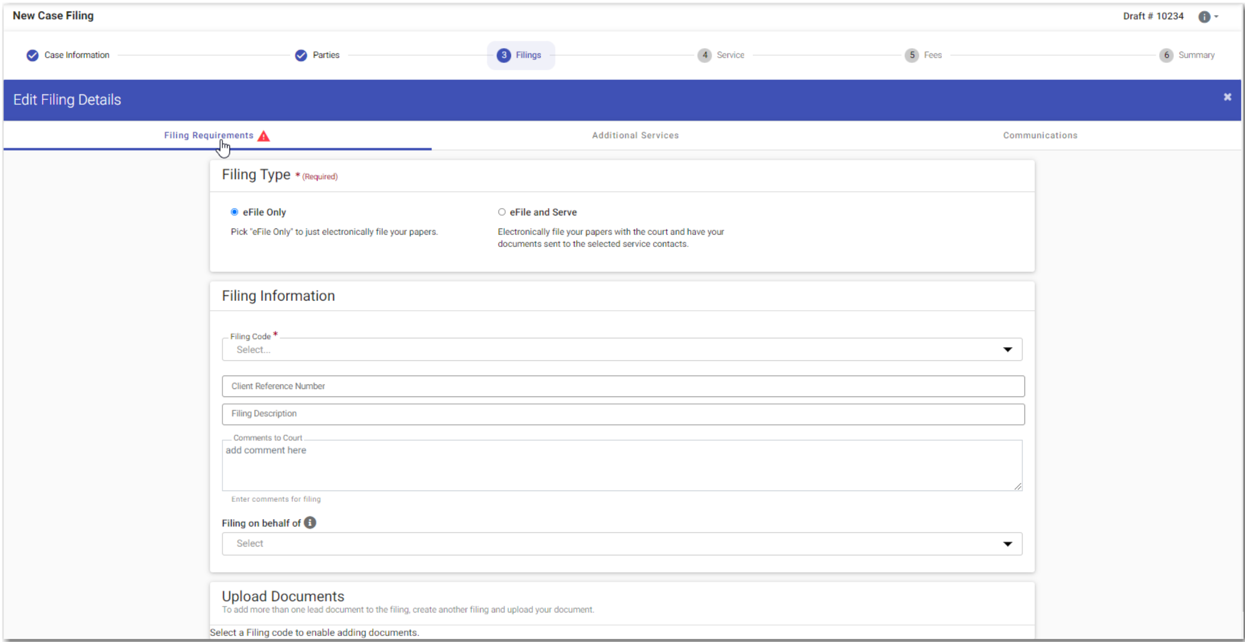
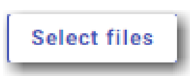


Figure 10.18 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.
5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.
8. In the Upload Documents pane, click 

. Then, select the document that you want to upload.

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

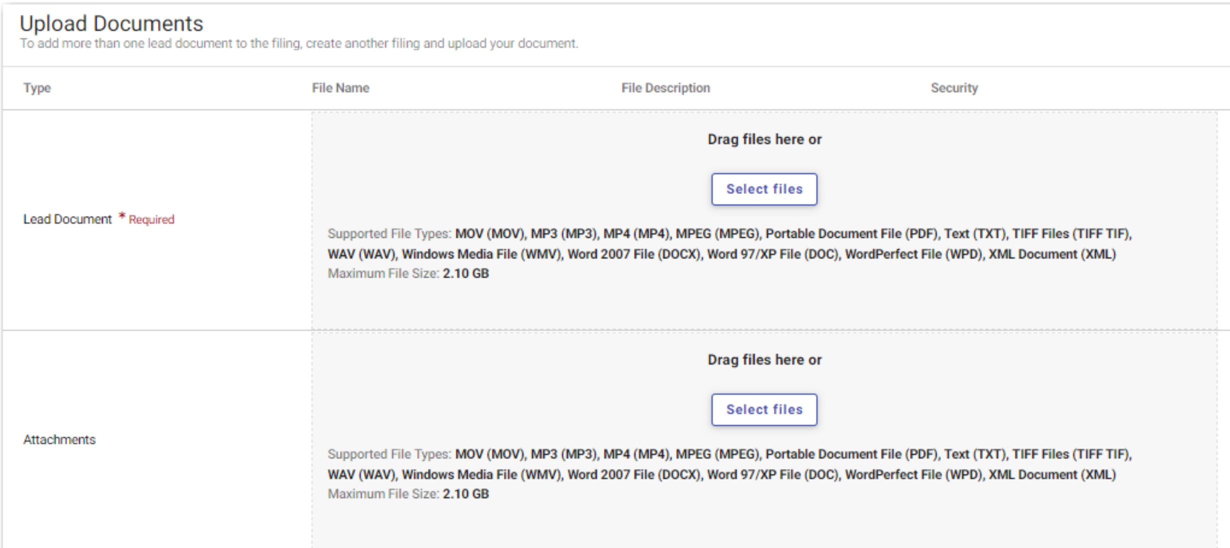


Figure 10.19 – Upload Documents Pane

9. If you have attachments to add to the filing, click 

in the **Attachments** section. Then, upload the specified attachments.
10. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
11. To add additional services, click **Additional Services**.

    The Additional Services pane is displayed.

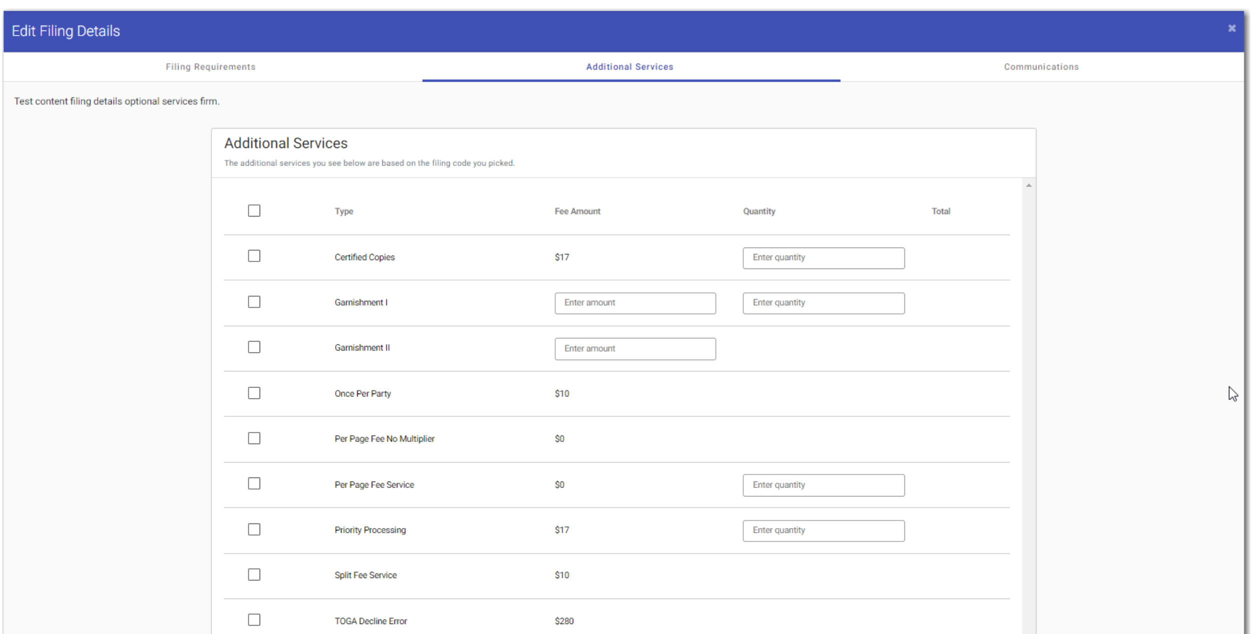


Figure 10.20 – Additional Services Pane on the Edit Filing Details Page

12. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

13. Click **Go to Communication**, or click **Communications** at the top of the page.

    The Communications pane is displayed.

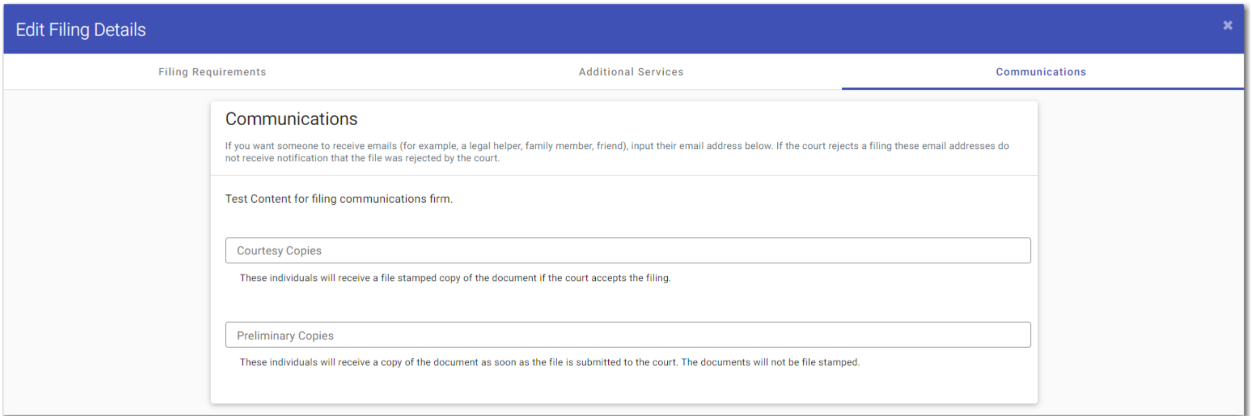


Figure 10.21 – Communications Pane on the Edit Filing Details Page

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.
15. Click **Save**.
16. If you want to add another filing, on the *Filings* page, click **+ Add More**. Then, repeat the same steps for the next filing.
17. After you have added all of the filings, click **Service →**.

Merging Documents for File Upload in a Case Filing

You can merge multiple documents into one file before uploading the file in a case filing.

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

To merge multiple documents for file upload:

1. Navigate to the *Filings* page.
2. Complete the fields pertaining to the case filing.
3. In the Upload Documents pane, click **Merge documents**.

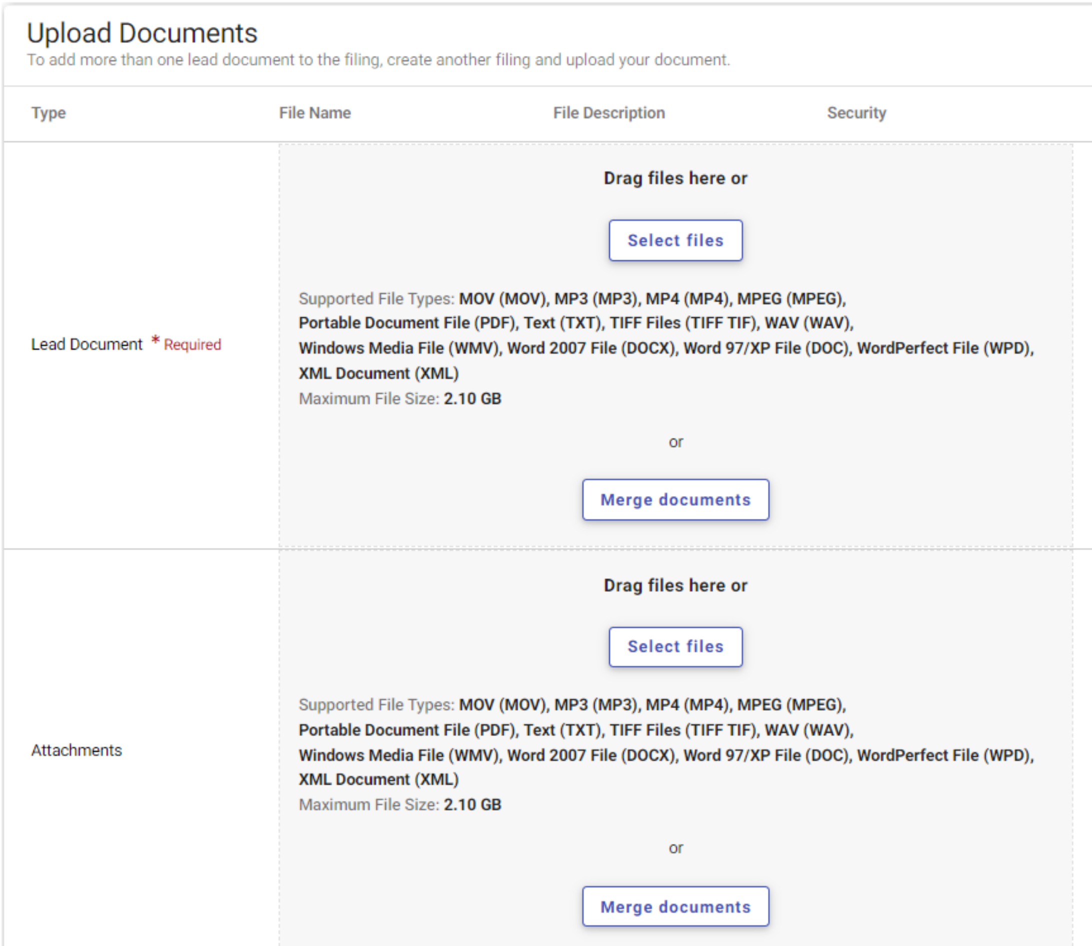


Figure 10.22 – Example of the Upload Documents Pane

The *Merge Documents* window is displayed.

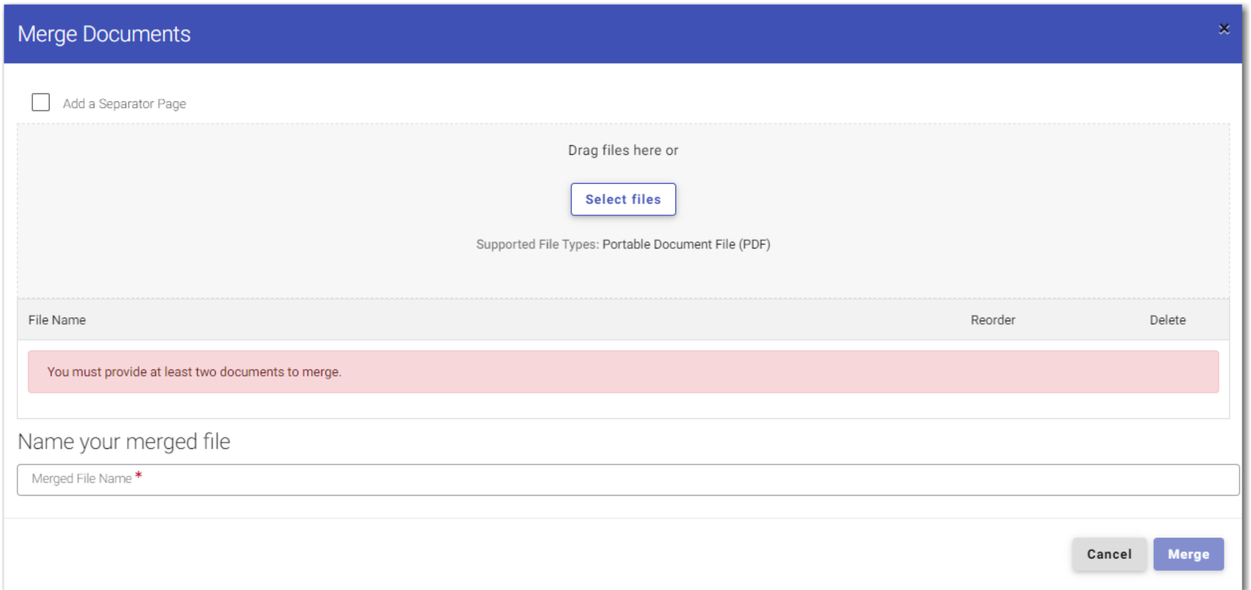


Figure 10.23 – Merge Documents Window

4. Click , and then select the files that you want to merge.
5. If you want to change the order of the files after you have added them, use the up and down arrows to reorder the files.
6. Type a name for the merged file in the **Name your merged file** field.
7. If you want to add a separator page to the files, select **Add a Separator Page**.
8. When you have added all of your files, reordered them if necessary, and named the merged file, click .
9. Proceed with the rest of your filing.

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.

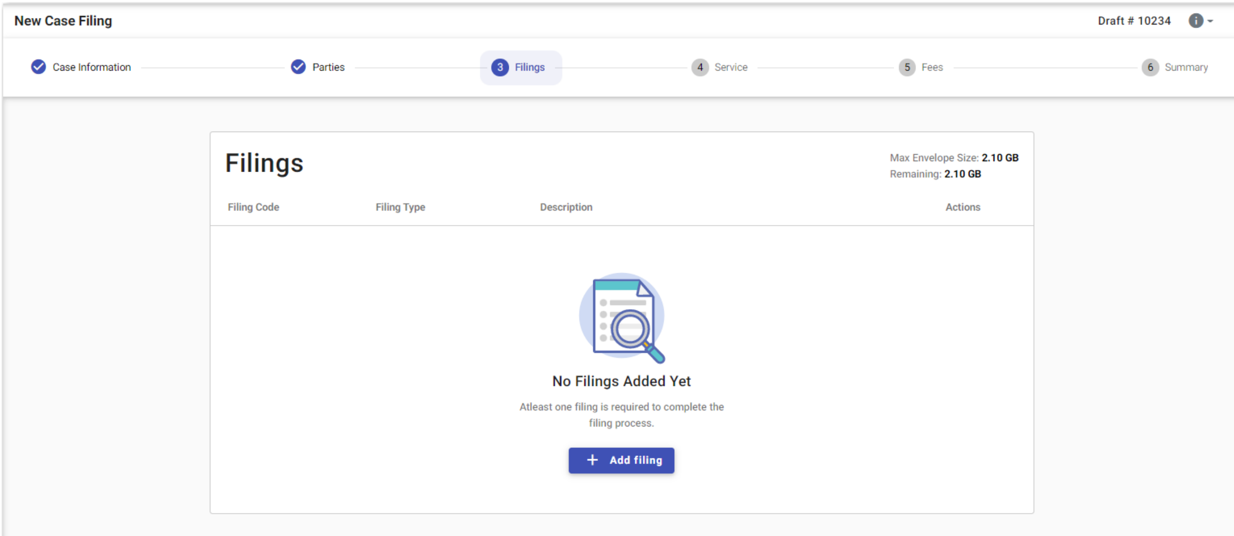


Figure 10.24 – Filings Page

To enter the filing details:

1. On the *Filings* page, click **+ Add filing** .

   The *Edit Filing Details* page is displayed.

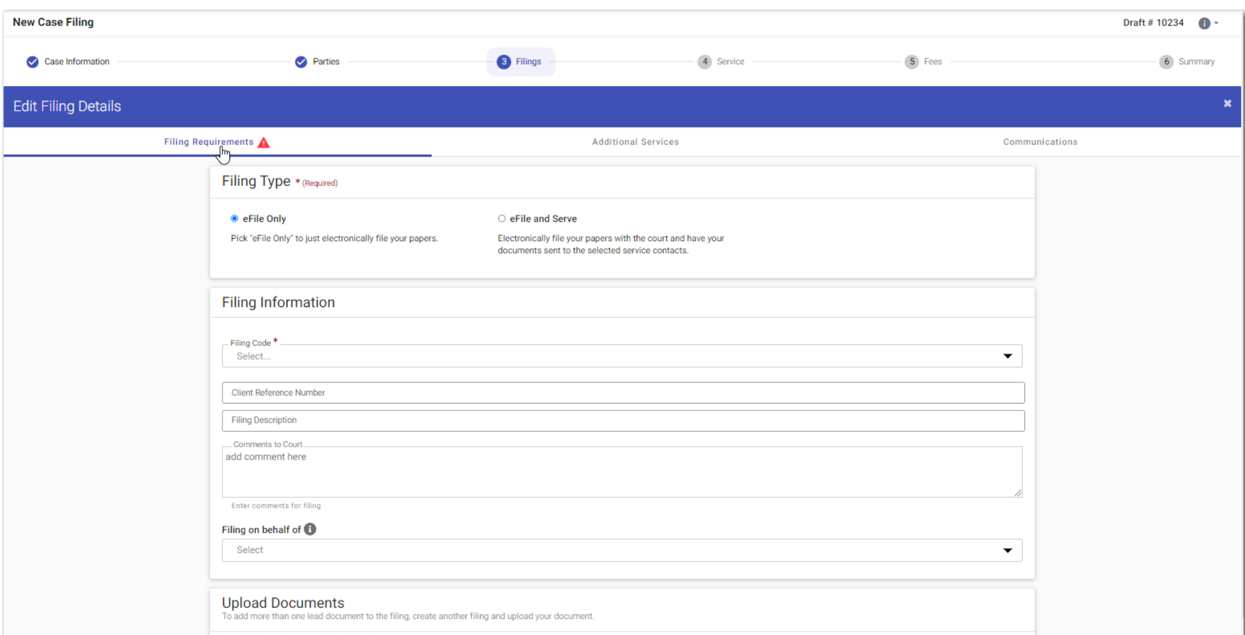


Figure 10.25 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the appropriate filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.

5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.
8. In the Upload Documents pane, click 

. Then, select the document that you want to upload.

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

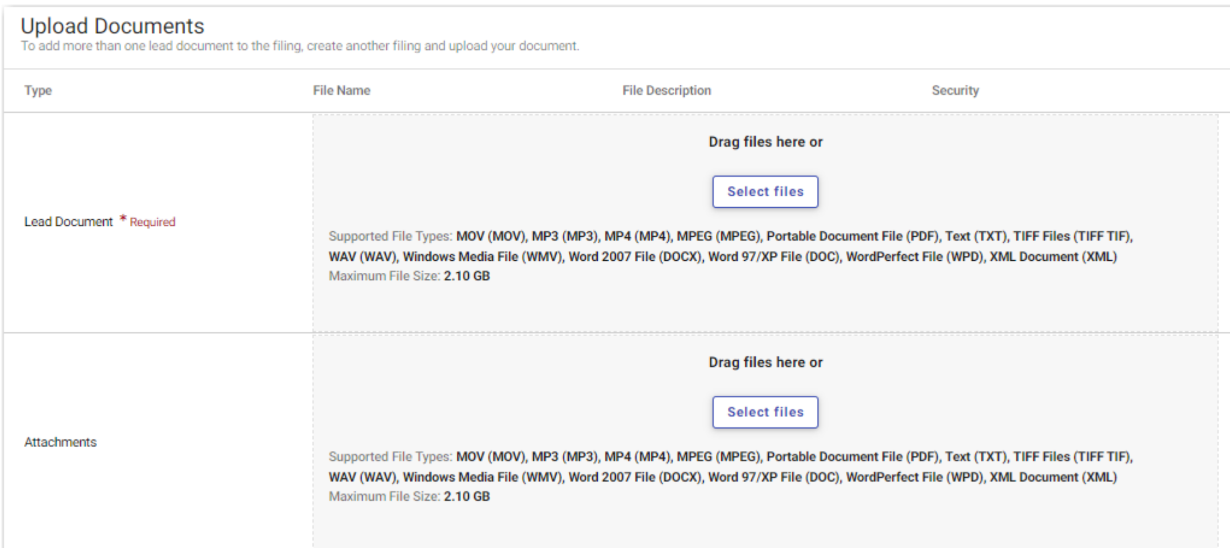


Figure 10.26 – Upload Documents Pane

9. If you have attachments to add to the filing, click 

 in the **Attachments** section. Then, upload the specified attachments.
10. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
11. To add additional services, click **Additional Services**.

    The Additional Services pane is displayed.

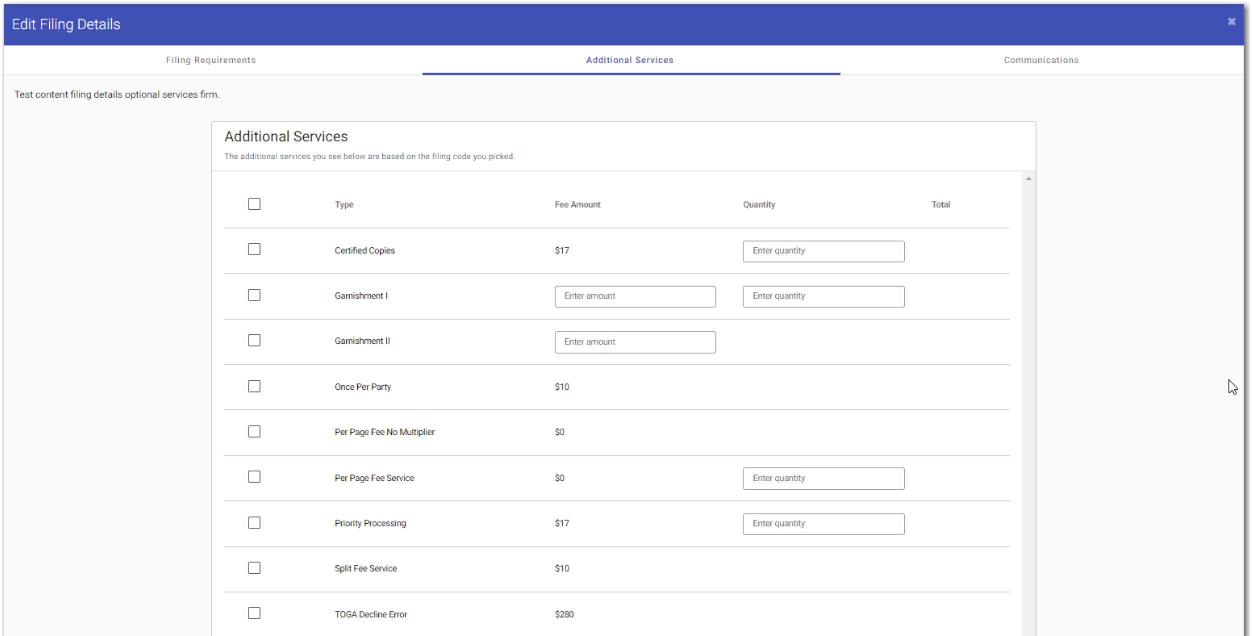


Figure 10.27 – Additional Services Pane on the Edit Filing Details Page

12. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

13. Click **Go to Communication**, or click **Communications** at the top of the page.

    The Communications pane is displayed.

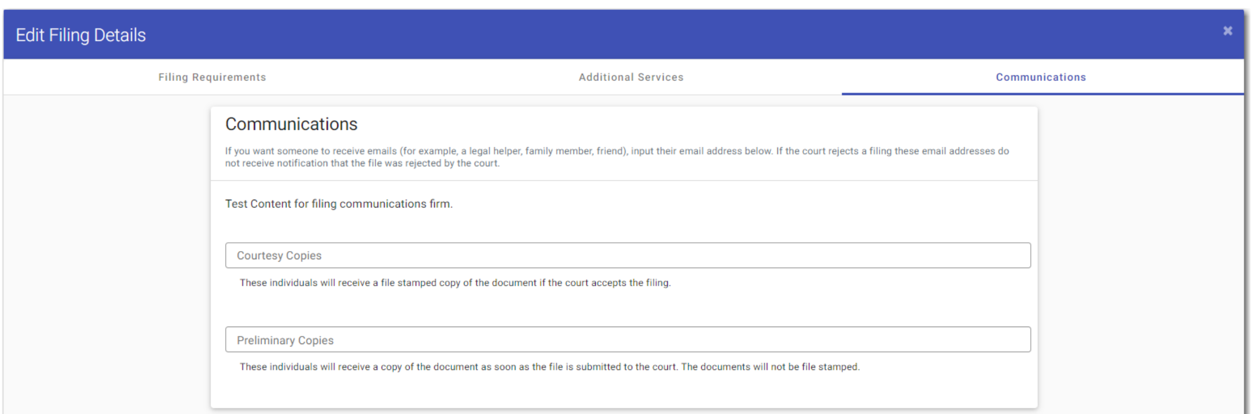


Figure 10.28 – Communications Pane on the Edit Filing Details Page

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

15. Click **Save**.

16. Click **Service →**.

    The *Service* page is displayed.

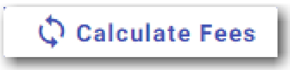
17. Select the service contacts, and then click 

.

    The *Fees* page is displayed.

18. On the *Fees* page, type the amount of damages for the case in the **Ad Damnum** field.
19. Select the payment account from the **Payment Account** drop-down list, or follow the steps to create a new payment account.
20. 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.

21. Select the filing attorney from the **Filing Attorney** drop-down list.
22. Select the filer type from the **Filer Type** drop-down list.
23. Click 

.

    The fees for the filing are displayed.

24. 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: The Motion Type feature is configured by Tyler and may not be available on your system.

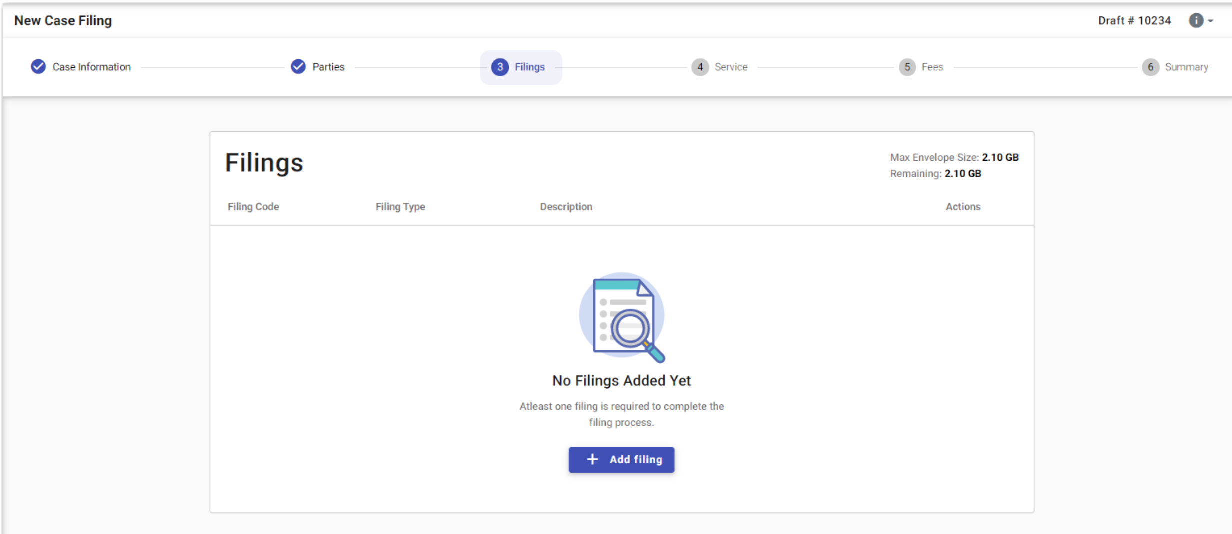


Figure 10.29 – Filings Page

To enter a filing with a Motion Type code:

1. On the *Filings* page, click  .

   The *Edit Filing Details* page is displayed.

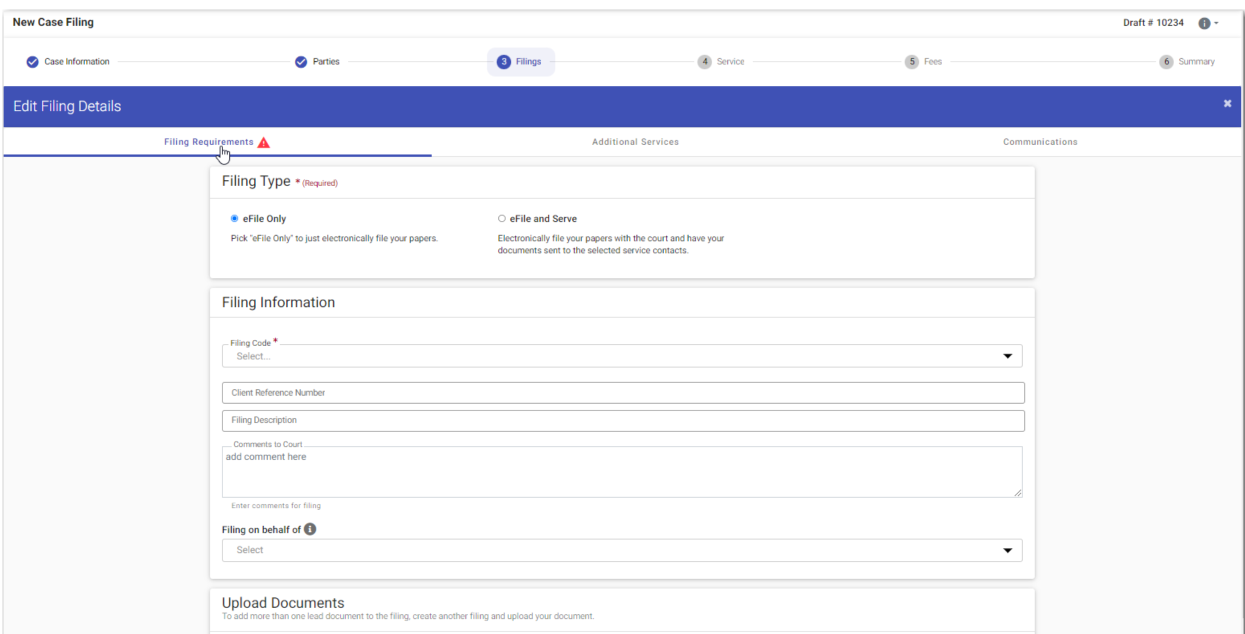


Figure 10.30 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, 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.

4. Select the appropriate motion type from the drop-down list.
5. Type a client reference number in the **Client Reference Number** field.
6. Type a description in the **Filing Description** field.
7. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
8. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.
9. In the Upload Documents pane, click Select files. Then, select the document that you want to upload.

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

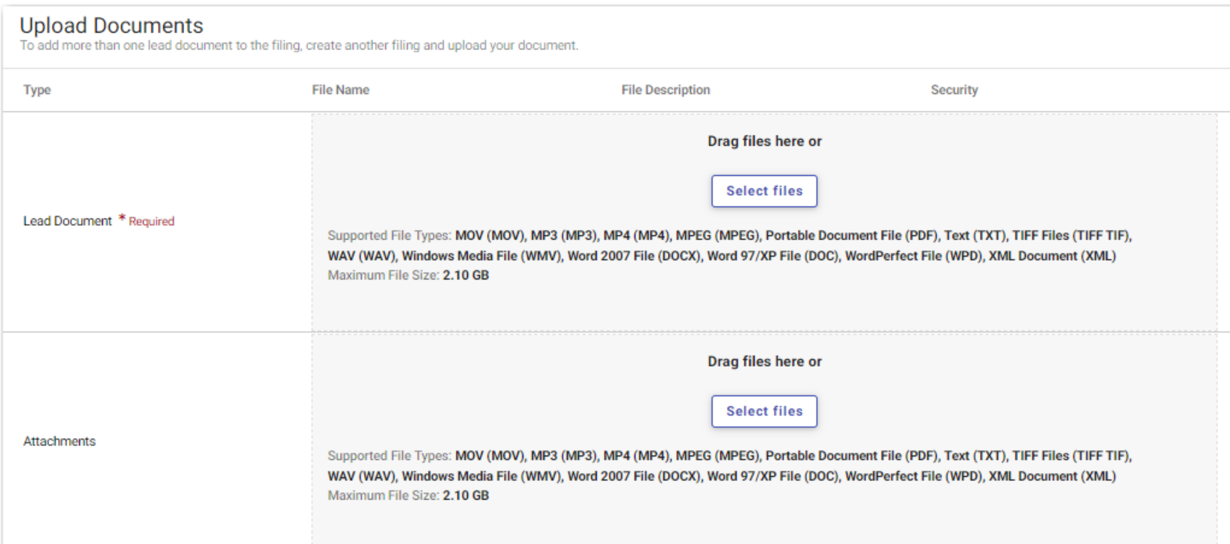


Figure 10.31 – Upload Documents Pane

10. If you have attachments to add to the filing, click Select files in the **Attachments** section. Then, upload the specified attachments.
11. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
12. To add additional services, click **Additional Services**.

    The Additional Services pane is displayed.

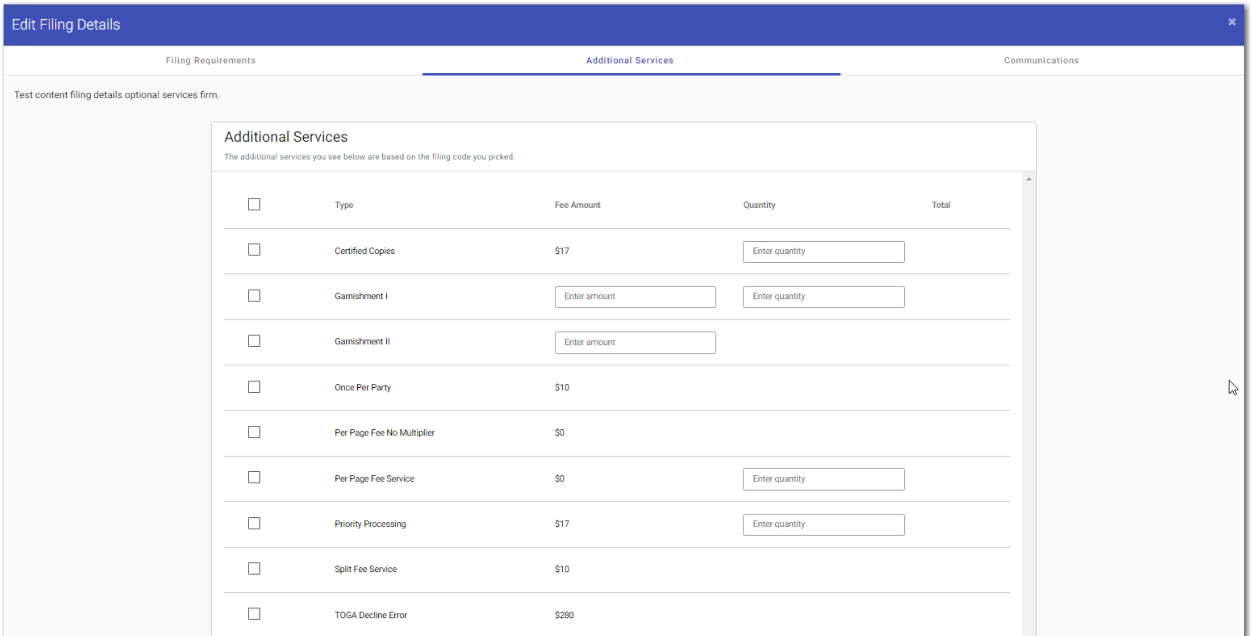


Figure 10.32 – Additional Services Pane on the Edit Filing Details Page

13. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

14. Click **Go to Communication**, or click **Communications** at the top of the page.

    The Communications pane is displayed.

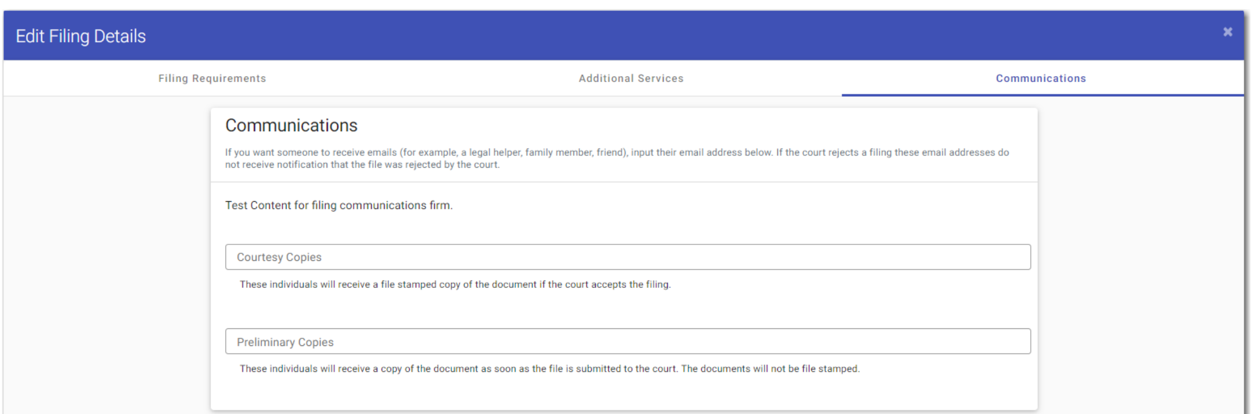


Figure 10.33 – Communications Pane on the Edit Filing Details Page

15. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

16. Click **Save**.

17. If you want to add another filing, on the *Filings* page, click **+ Add More**. Then, repeat the same steps for the next filing.

18. After you have added all of the filings, click 

.

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.

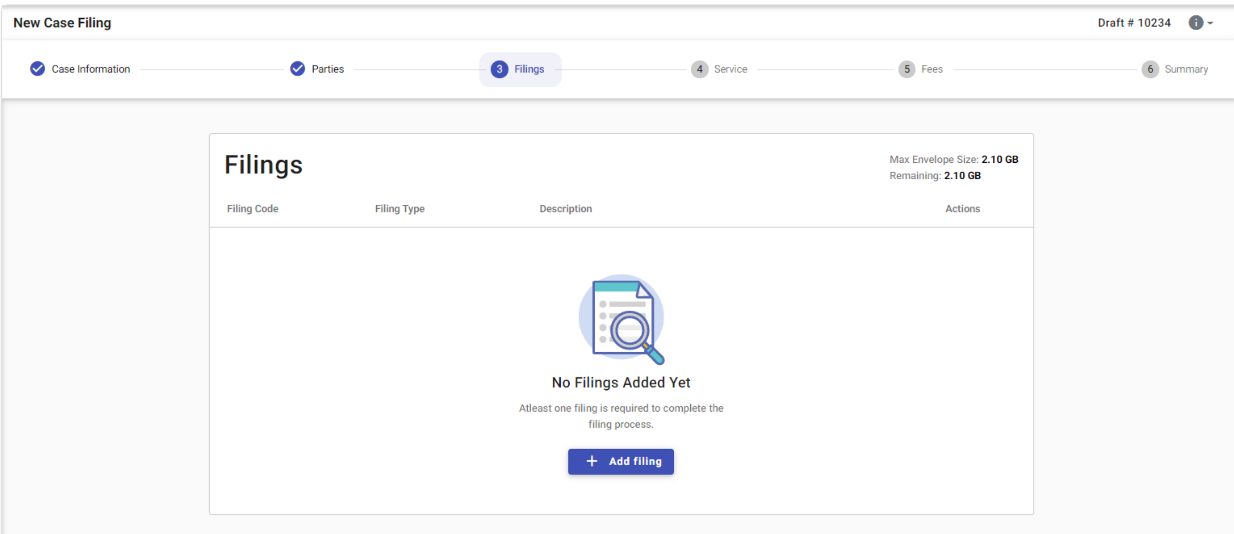


Figure 10.34 – Filings Page

To enter the filing details:

1. On the *Filings* page, click 

.

   The *Edit Filing Details* page is displayed.

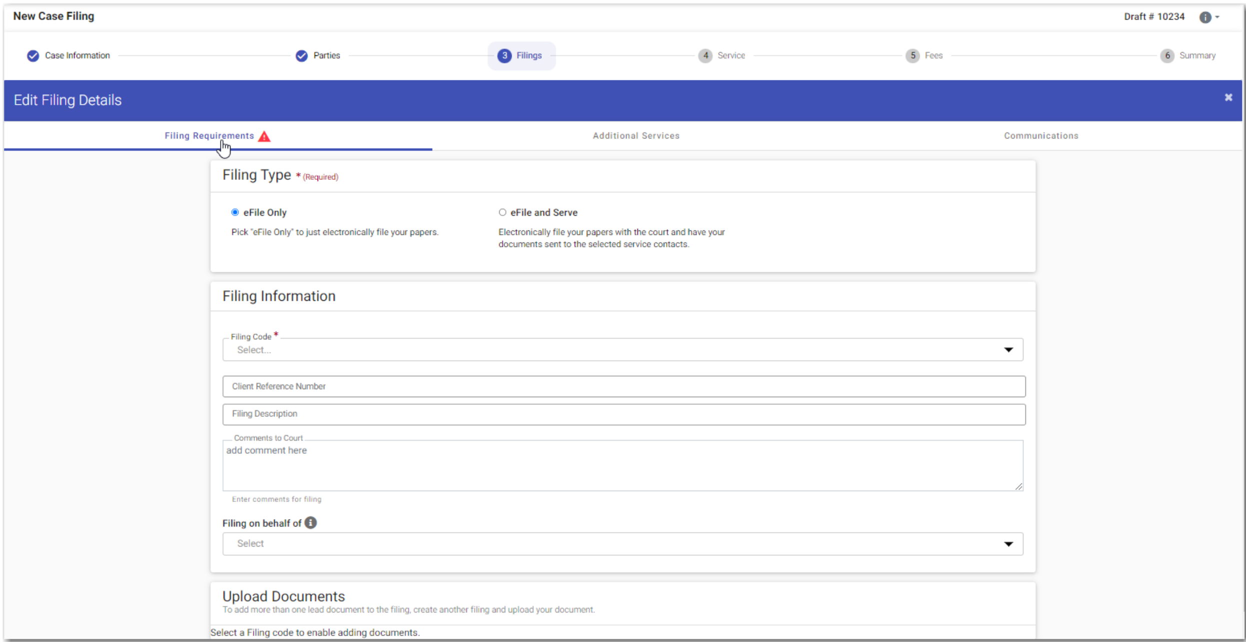
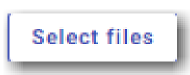


Figure 10.35 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the appropriate filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.
5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.
8. In the Upload Documents pane, click 

. Then, select the document that you want to upload.

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

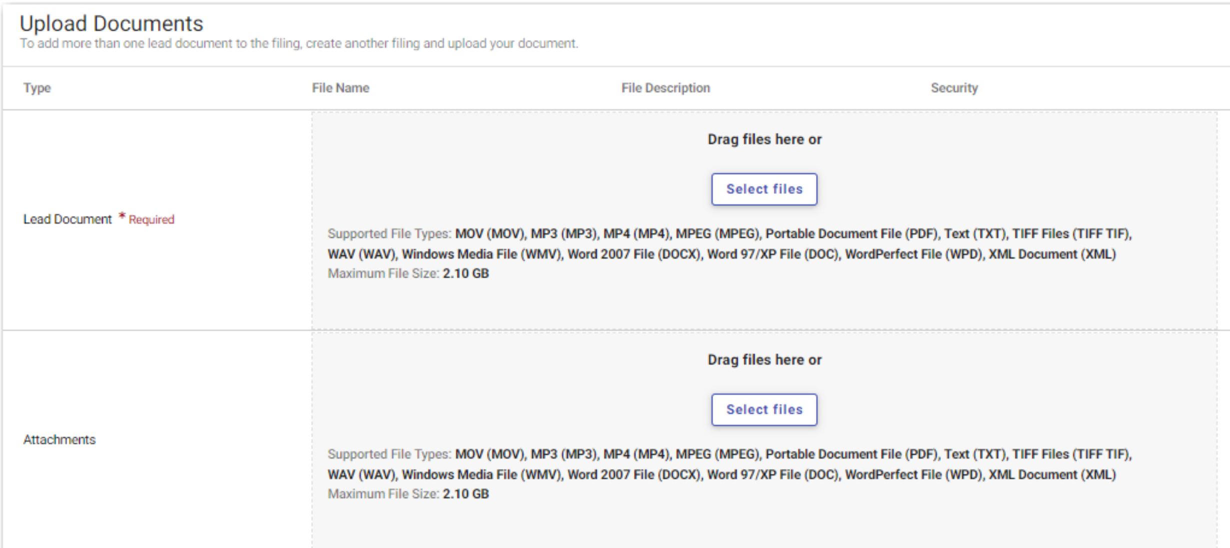


Figure 10.36 – Upload Documents Pane

9. If you have attachments to add to the filing, click 

in the **Attachments** section. Then, upload the specified attachments.
10. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
11. To add additional services, click **Additional Services**.

    The Additional Services pane is displayed.

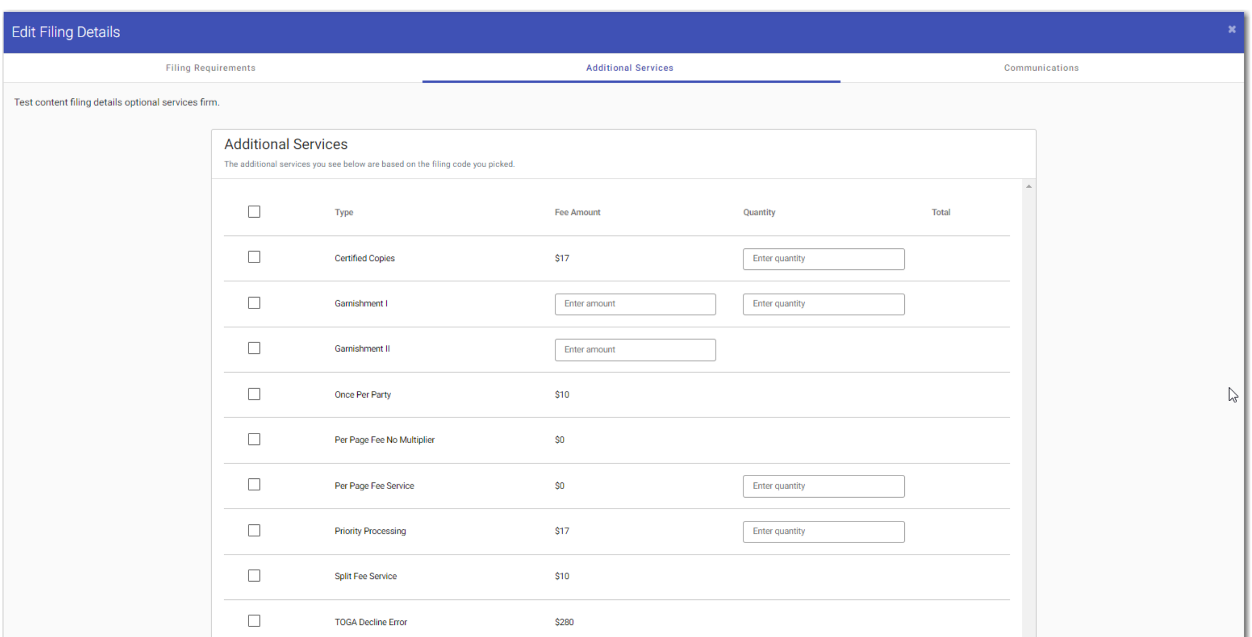


Figure 10.37 – Additional Services Pane on the Edit Filing Details Page

12. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

13. Click Go to Communication, or click **Communications** at the top of the page.

    The Communications pane is displayed.

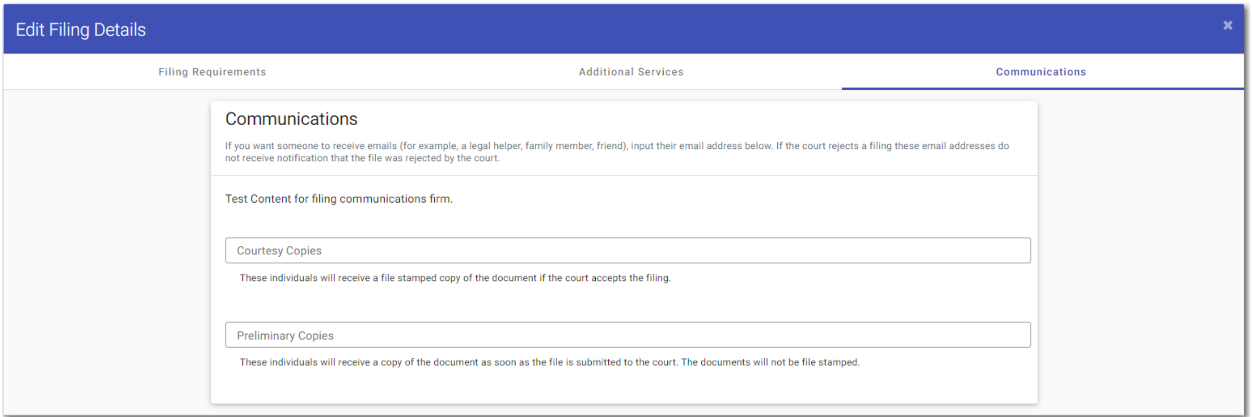


Figure 10.38 – Communications Pane on the Edit Filing Details Page

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.
15. Click Save.
16. Click Service →.

    The *Service* page is displayed.

17. Select the service contacts, and then click Fees →.

    The *Fees* page is displayed.

18. On the *Fees* page, type the Claim Amount in the **Claim Amount** field.
19. Select the payment account from the **Payment Account** drop-down list, or follow the steps to create a new payment account.
20. Select the filing attorney from the **Filing Attorney** drop-down list.
21. 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.

22. Select the filer type from the **Filer Type** drop-down list.
23. Click Calculate Fees.

    The fees for the filing are displayed.

24. 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.

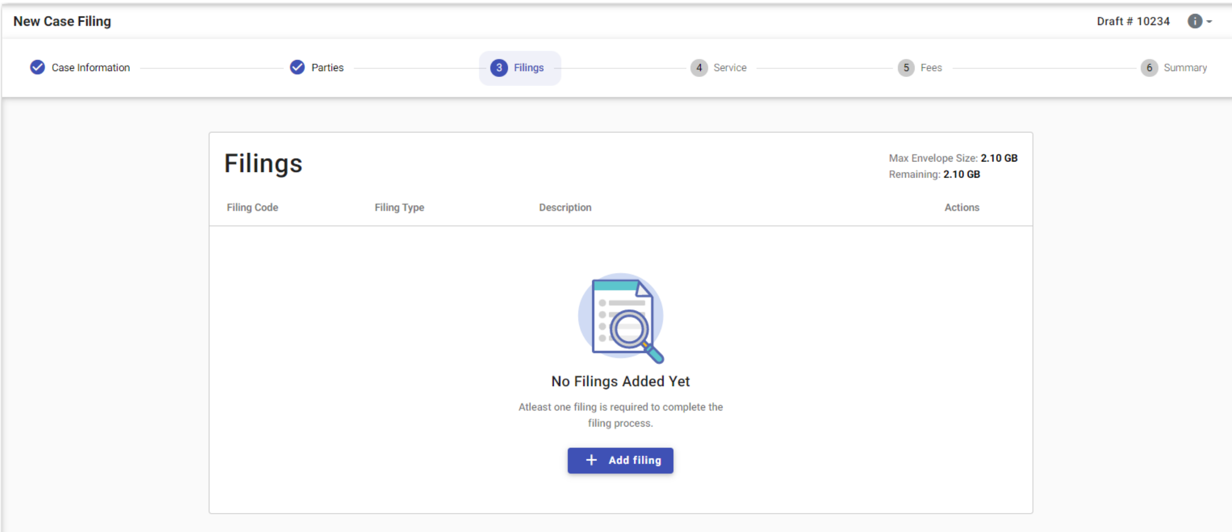


Figure 10.39 – Filings Page

To enter the filing details:

1. On the *Filings* page, click 

.

   The *Edit Filing Details* page is displayed.

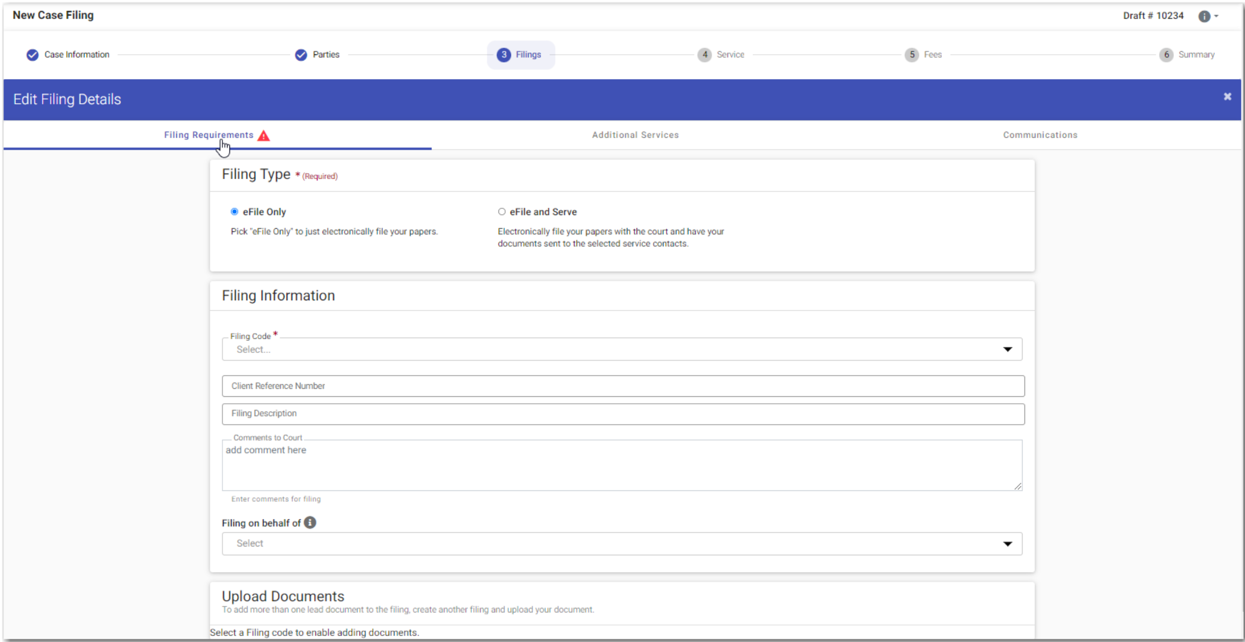
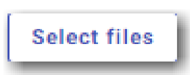


Figure 10.40 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the appropriate filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.
5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.
8. In the Upload Documents pane, click 

. Then, select the document that you want to upload.

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

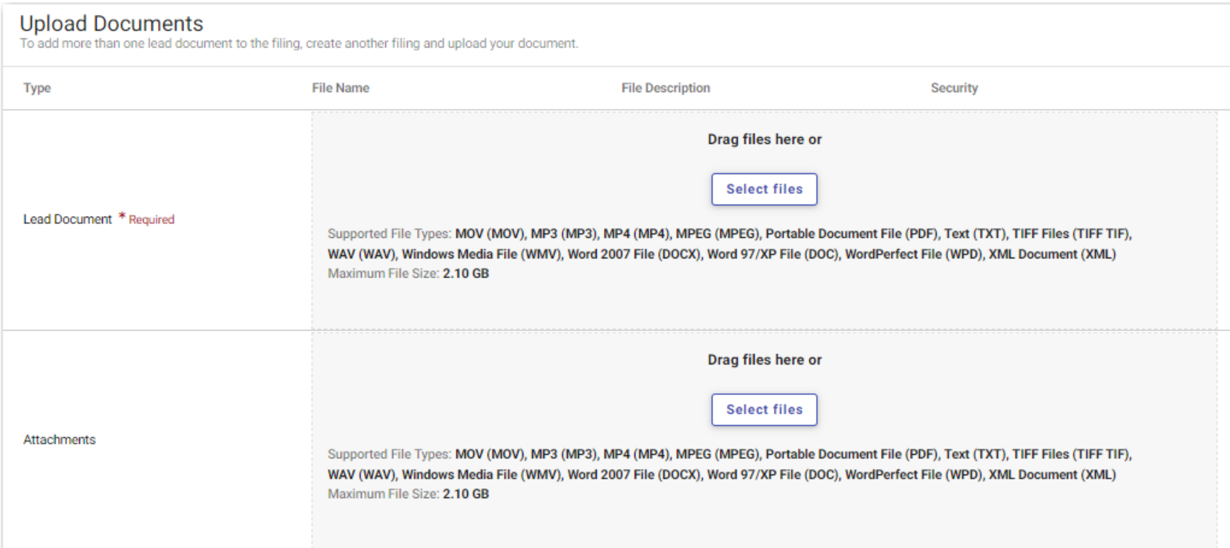


Figure 10.41 – Upload Documents Pane

9. If you have attachments to add to the filing, click  in the **Attachments** section. Then, upload the specified attachments.
10. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
11. To add additional services, click **Additional Services**.

    The Additional Services pane is displayed.

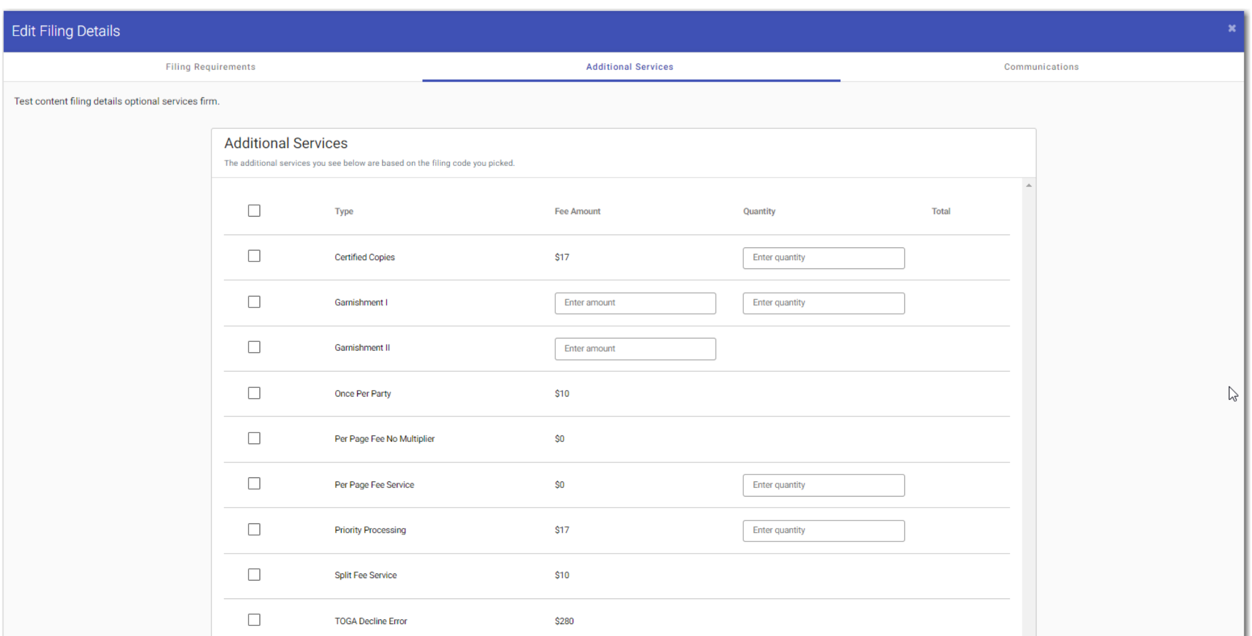


Figure 10.42 – Additional Services Pane on the Edit Filing Details Page

12. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

13. Click **Go to Communication**, or click **Communications** at the top of the page.

    The Communications pane is displayed.

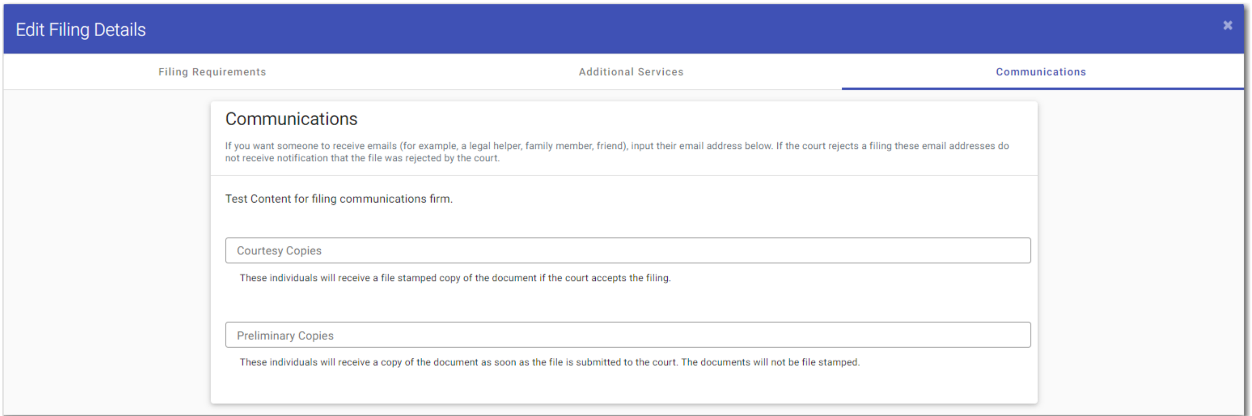


Figure 10.43 – Communications Pane on the Edit Filing Details Page

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.
15. Click **Save**.
16. Click **Service →**.

    The *Service* page is displayed.

17. Select the service contacts, and then click **Fees →**.

    The *Fees* page is displayed.

18. On the *Fees* page, type the Estate Value in the **Estate Value** field.
19. Select the payment account from the **Payment Account** drop-down list, or follow the steps to create a new payment account.
20. Select the filing attorney from the **Filing Attorney** drop-down list.
21. 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.

22. Select the filer type from the **Filer Type** drop-down list.
23. Click **Calculate Fees**.

    The fees for the filing are displayed.

24. Click **Summary →** 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.

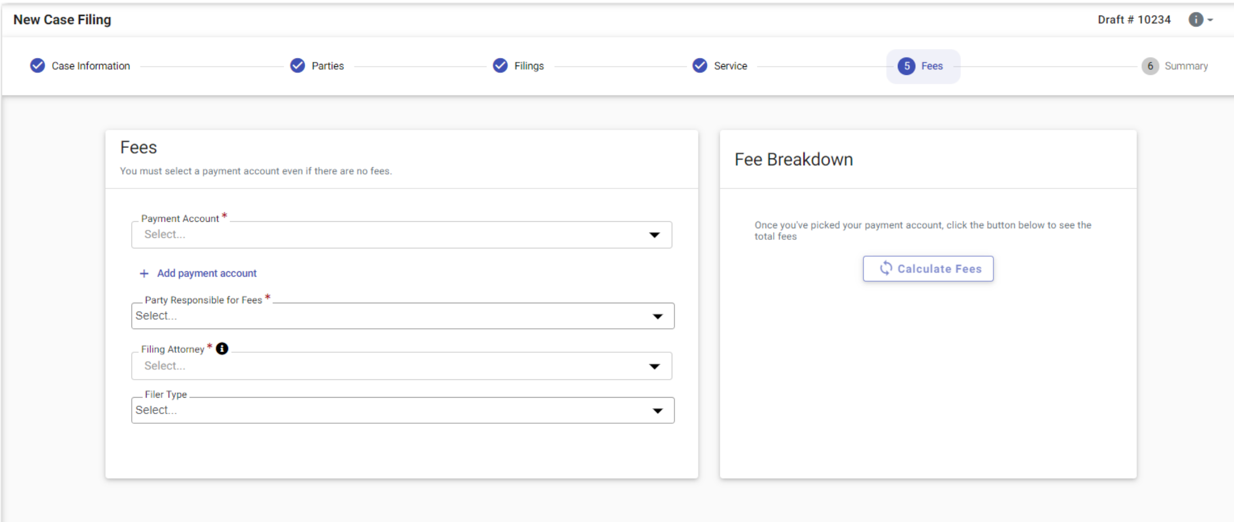
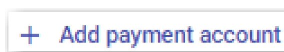


Figure 10.44 – Example of a Fees Page

To enter the payment information for your filing:

1. Select the payment account from the **Payment Account** drop-down list.

   If you do not have an existing payment account, click 

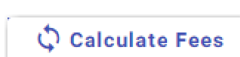
   . Additional fields are displayed. Then, follow the steps to create a new payment account.

   Refer to the following topics for details on creating the various types of payment accounts:

   - Adding a Credit Card Payment Account, page 53
   - Adding an E-Check Payment Account, page 57
   - Adding a Draw-Down Account, page 61

2. 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.

3. Select the filing attorney from the **Filing Attorney** drop-down list.
4. Select the filer type from the **Filer Type** drop-down list.
5. In the Fee Breakdown pane, click 

   .

   The fees for the filing are displayed.

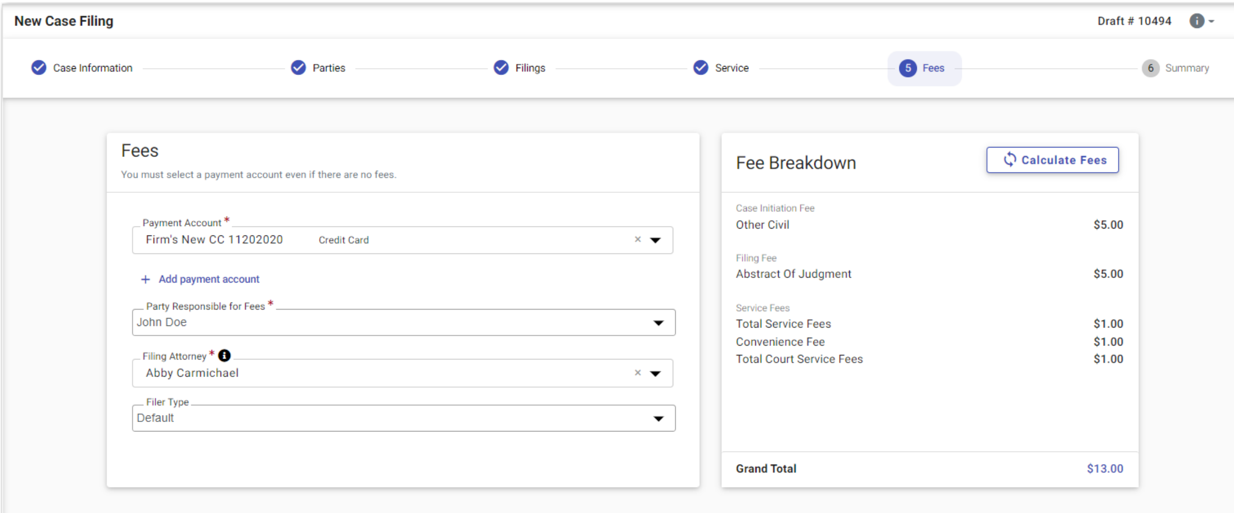


Figure 10.45 – Example of a Fees Page with the Filing Fees Displayed

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.

6. Review the filing fees, and then click 

.

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

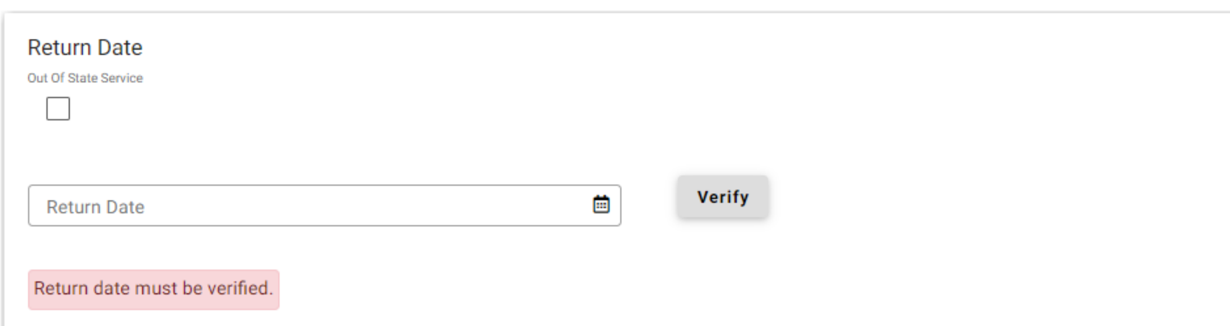
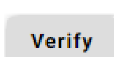


Figure 10.46 – Example of the Return Date Pane

After selecting a return date, click 

to check whether the selected date is available. If the selected date is verified, a confirmation message is displayed.

Note: You cannot proceed until you verify the selected date.

Figure 10.47 – 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.

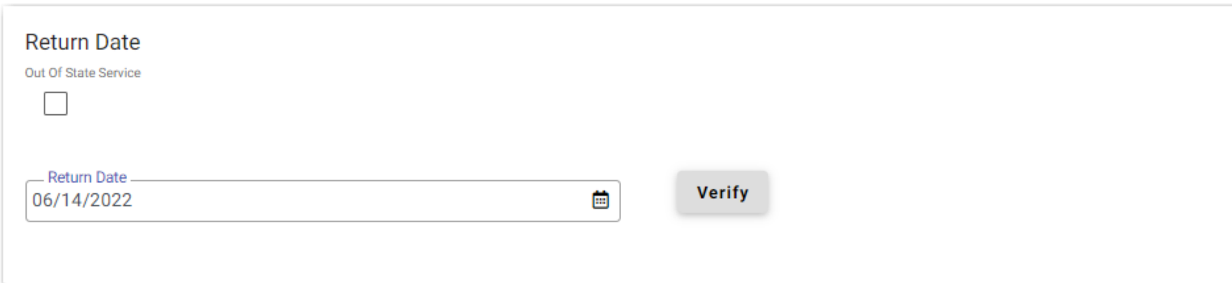


Figure 10.48 – Example of the Return Date Pane with a Valid Date Displayed

If you select an invalid return date, the invalid date is displayed with a red border, indicating an error. You cannot proceed until you select a valid date.

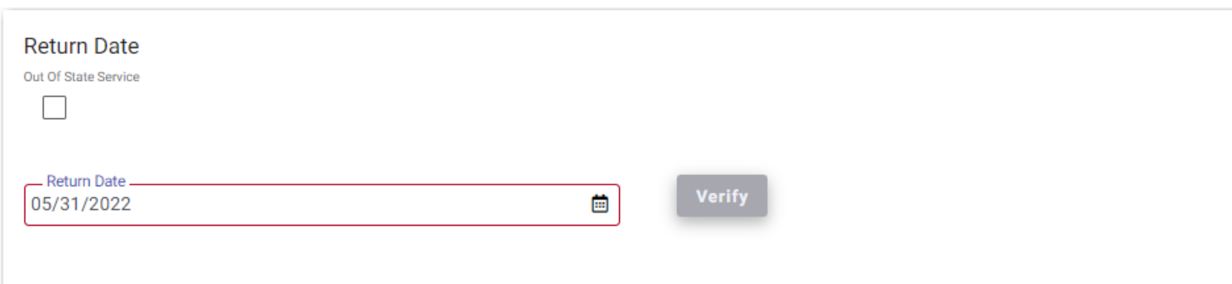


Figure 10.49 – Example of the Return Date Pane with an Error in the Return Date Field

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.

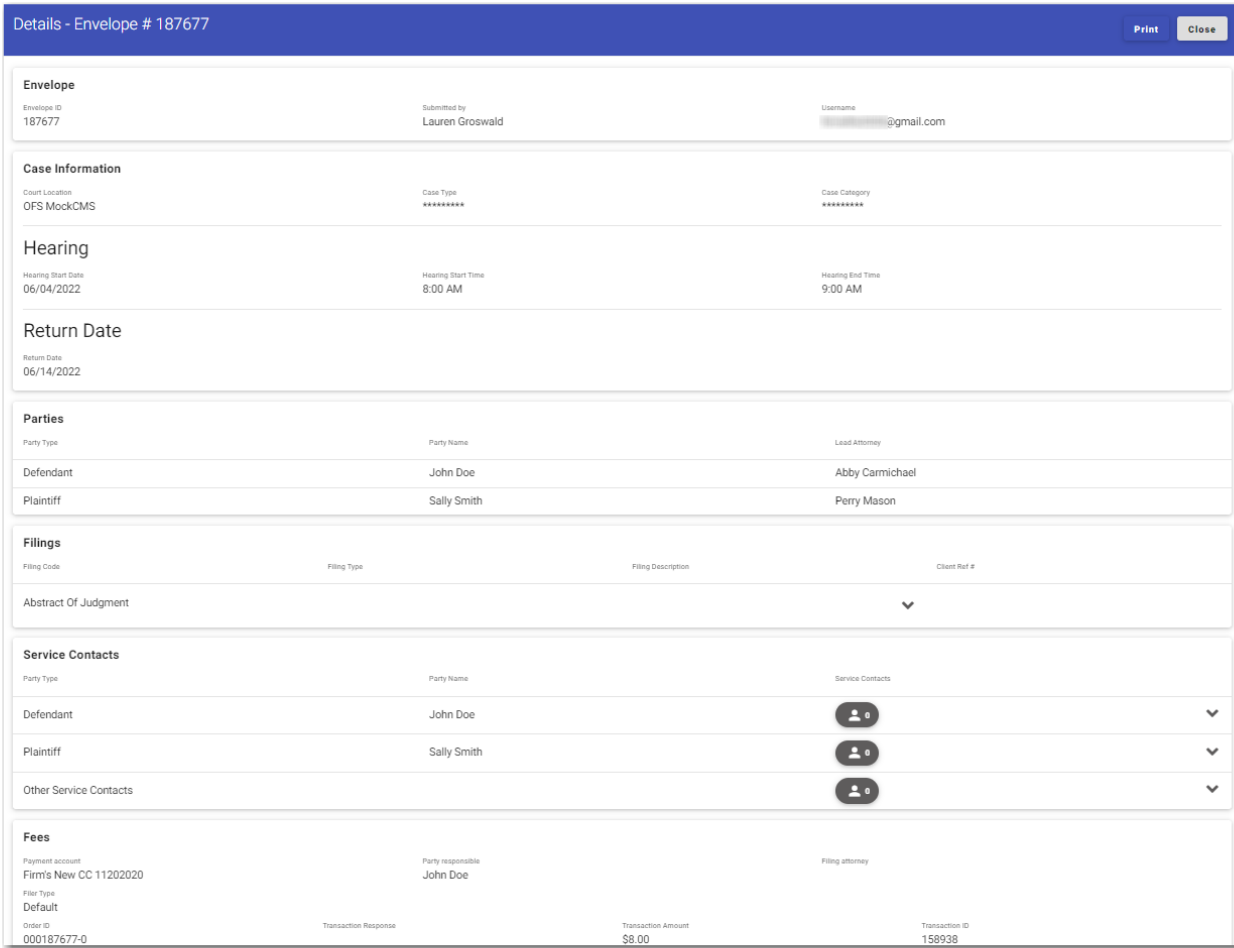


Figure 10.50 – Example of the Return Date in the Envelope Details

Selecting a Return Date for a Case Filing

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

To select a return date for a case filing:

1. From the *Dashboard* page, click 

.

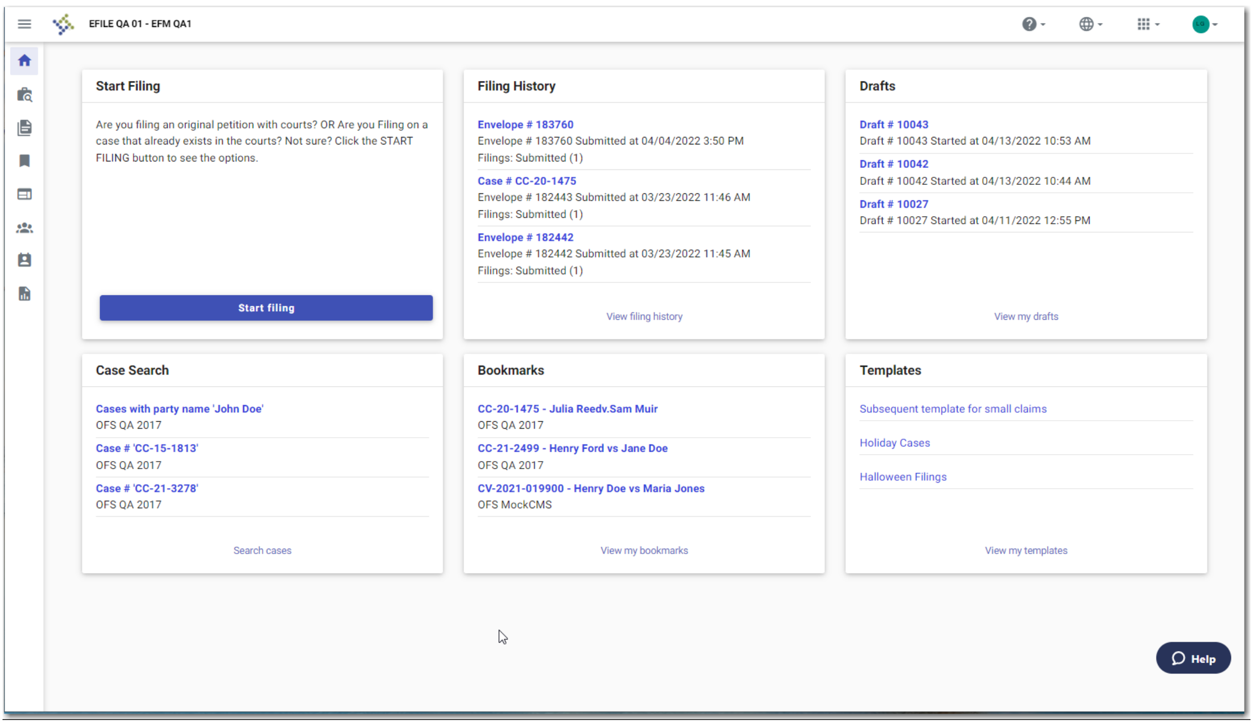


Figure 10.51 – Dashboard Page

The *Start Filing* page is displayed.

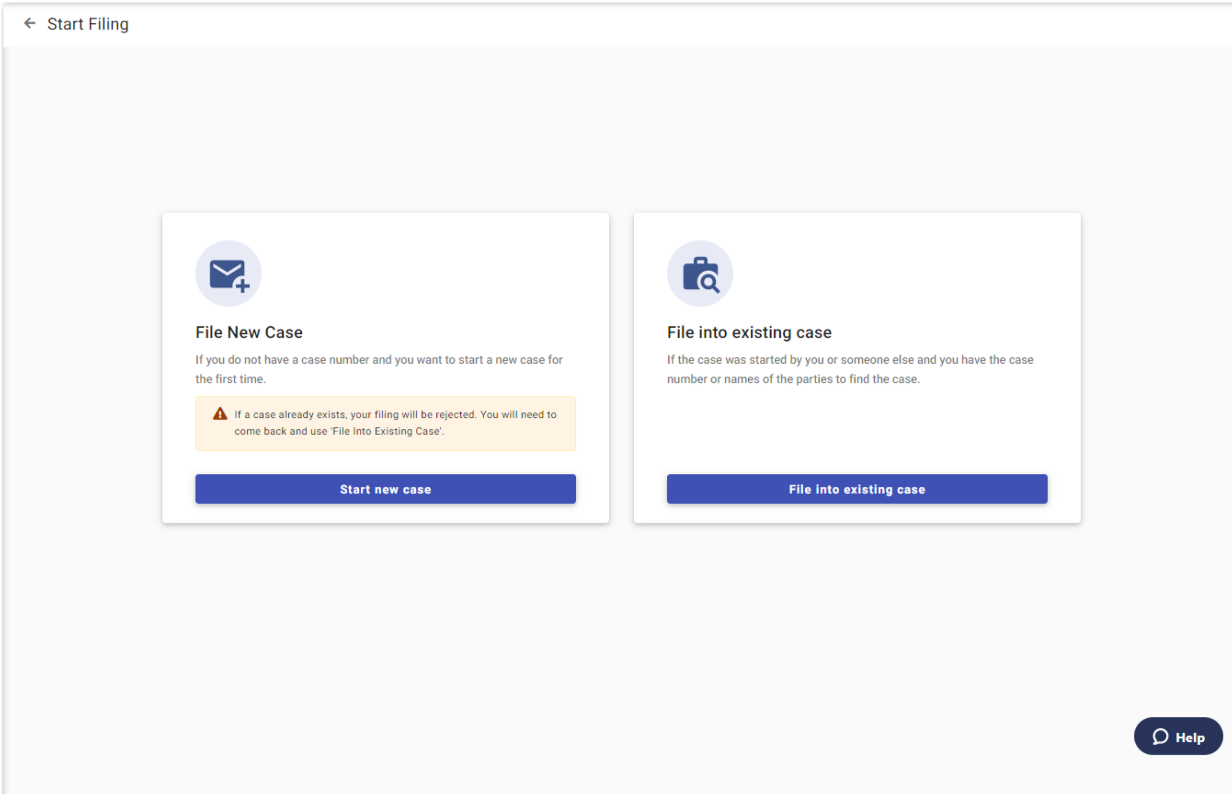


Figure 10.52 – Start Filing Page

2. Click **Start new case**.

   The *Case Information* page is displayed.

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

   The *Parties* page is displayed.

4. Complete the fields on the *Parties* page, and then click **Filings →**.

   The *Filings* page is displayed.

5. Complete the fields on the *Filings* page, and then click **Service →**.

   The *Service* page is displayed.

6. Select the service contacts, and then click **Fees →**.

   The *Fees* page is displayed.

7. Complete the fields on the *Fees* page, and then click **Summary →**.

The *Summary* page is displayed.

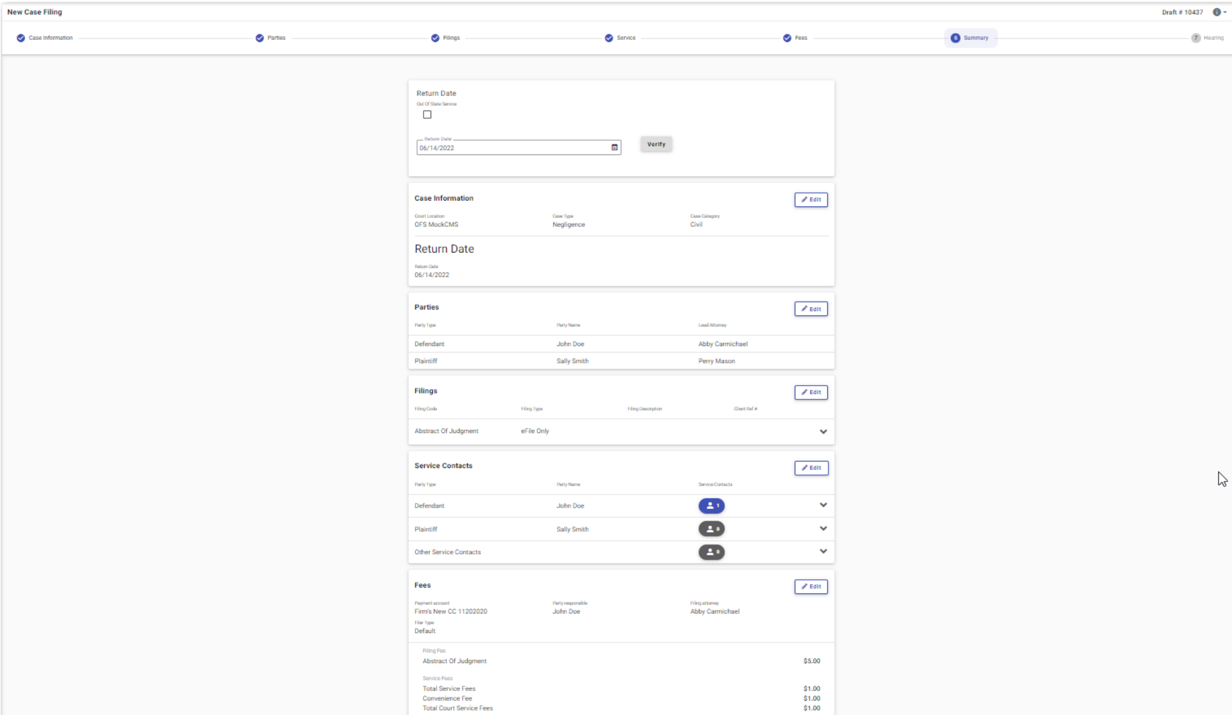


Figure 10.53 – Example of the Return Date Pane on the Summary Page

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

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

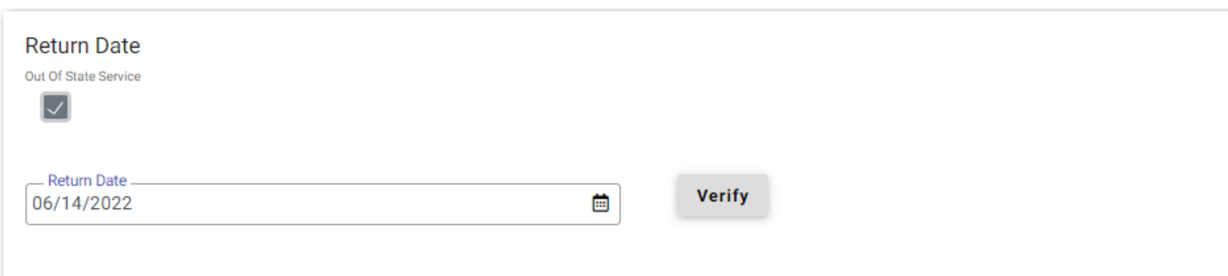


Figure 10.54 – Out of State Service Check Box Selected in the Return Date Pane

   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 10.55 – Return Date Verified Message

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

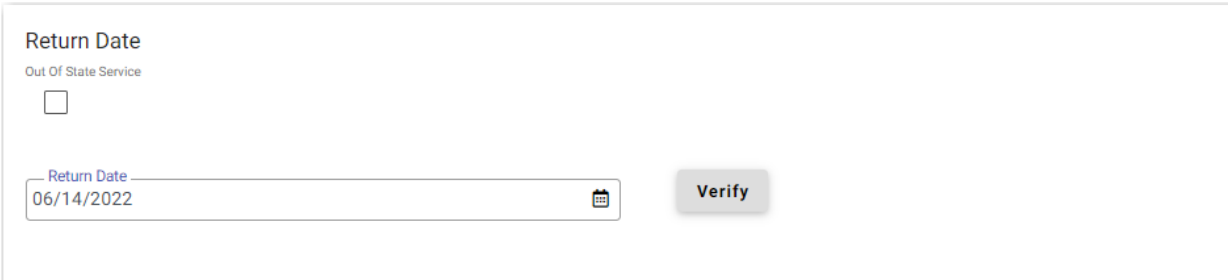


Figure 10.56 – Example of the Return Date Pane with a Valid Date Displayed

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

Reverify the Return Date

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

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

Reverifying a Return Date

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

To reverify the return date:

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

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

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

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

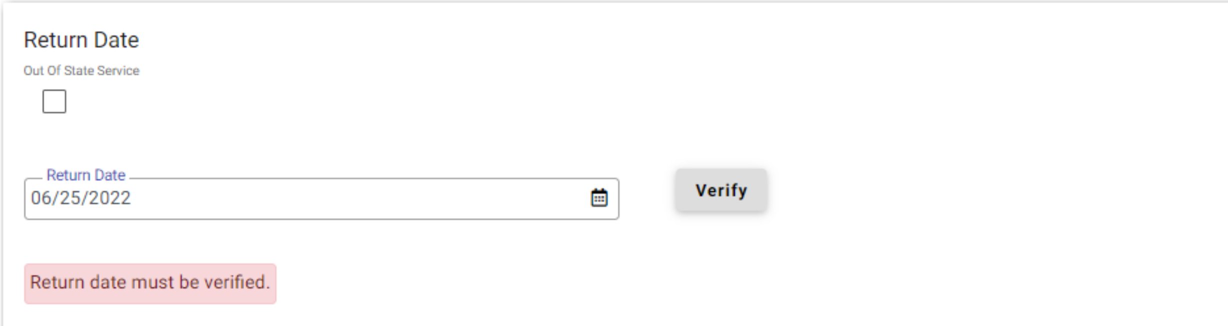


Figure 10.57 – Return Date Pane

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

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

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

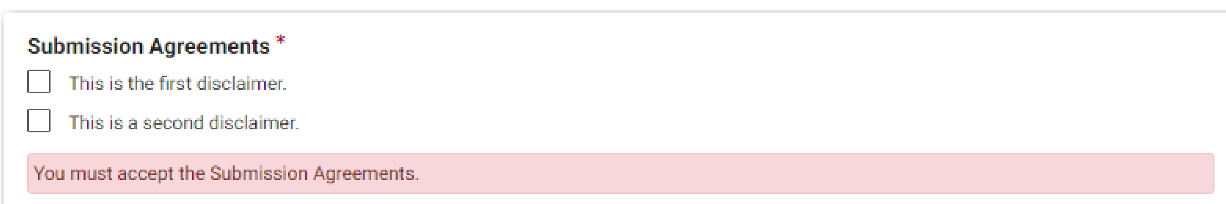


Figure 10.58 – Example of a Submission Agreements Pane with Two Disclaimers

Figure 10.59 – Example of a Submission Agreements Pane with the Check Boxes Selected for Two Disclaimers

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

Viewing the Envelope Summary

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

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

To view the envelope summary:

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

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

.

   The *Summary* page is displayed.

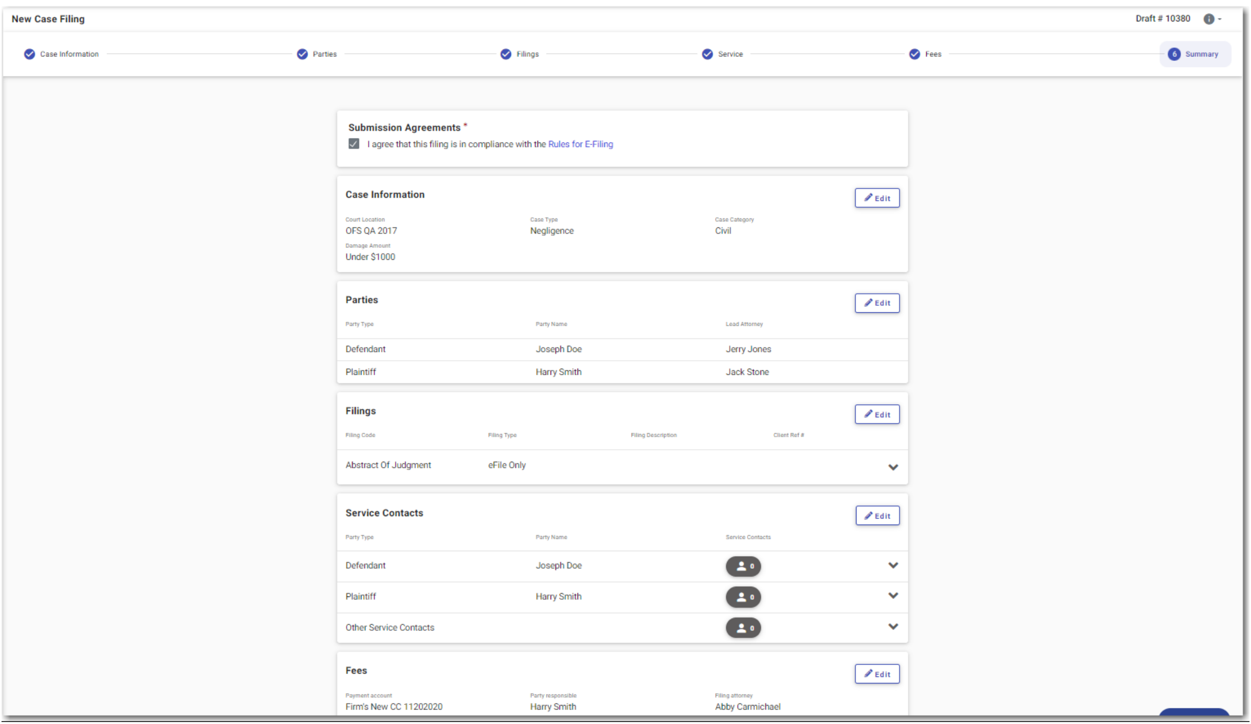


Figure 10.60 – Example of a Summary Page

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

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

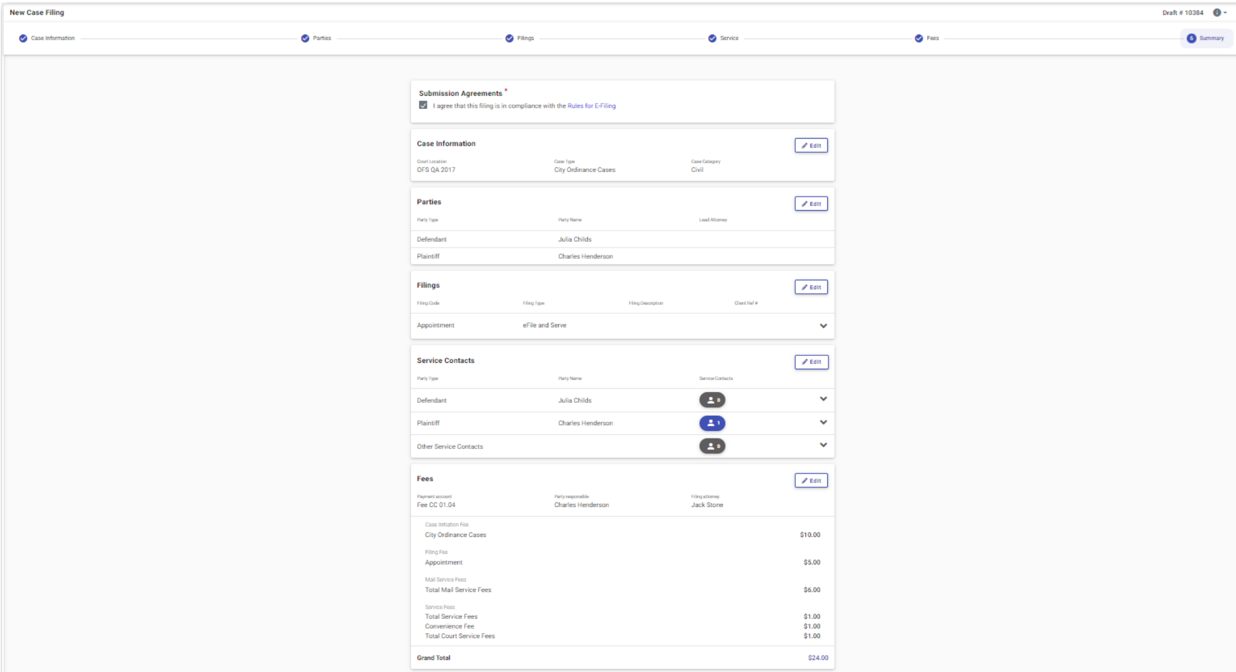


Figure 10.61 – Example of a Summary Page with Mail Service Fees Displayed

If envelope comments are configured on your system, the comments are displayed in the Case pane on the *Summary* page.

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

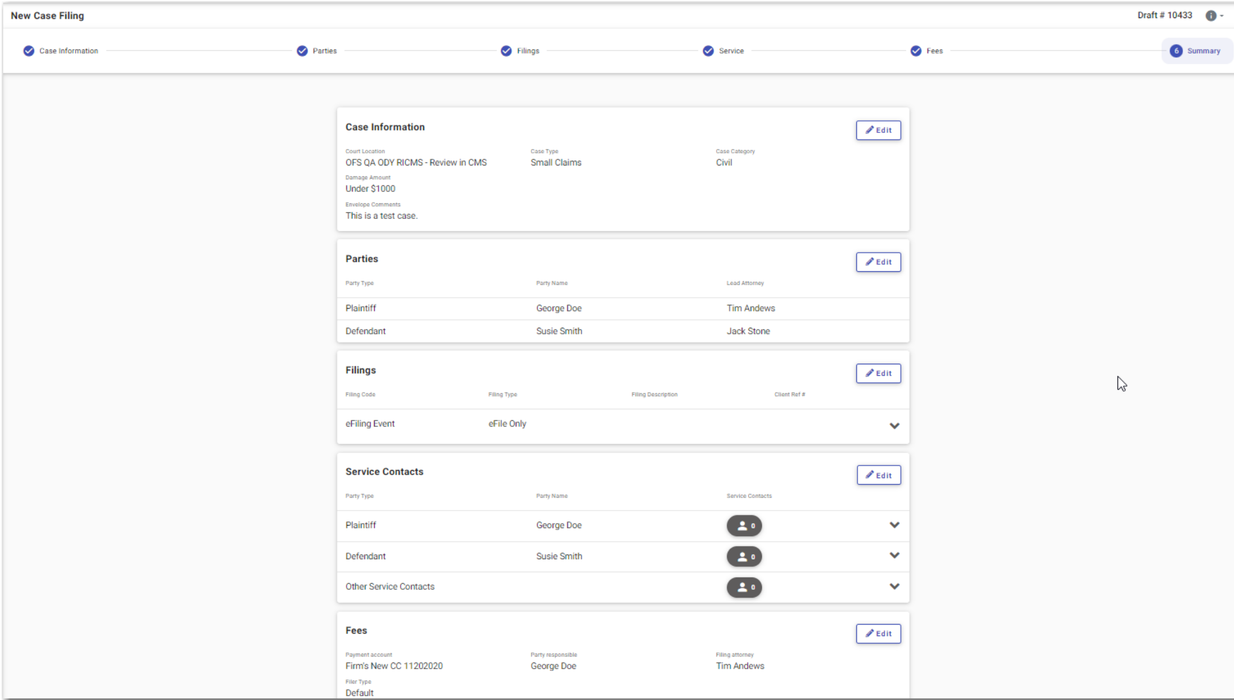


Figure 10.62 – Example of a Summary Page with Envelope Comments Displayed

3. If there are submission agreements for your filing, select the appropriate check boxes for the submission agreements.
4. Review the summary of the case filing. If you want to change any information on the page, click 

 in the pane in which you want to change the information.
5. After you are satisfied with the information in your filing, click 

.

   The *Envelope Submitted* window is displayed.

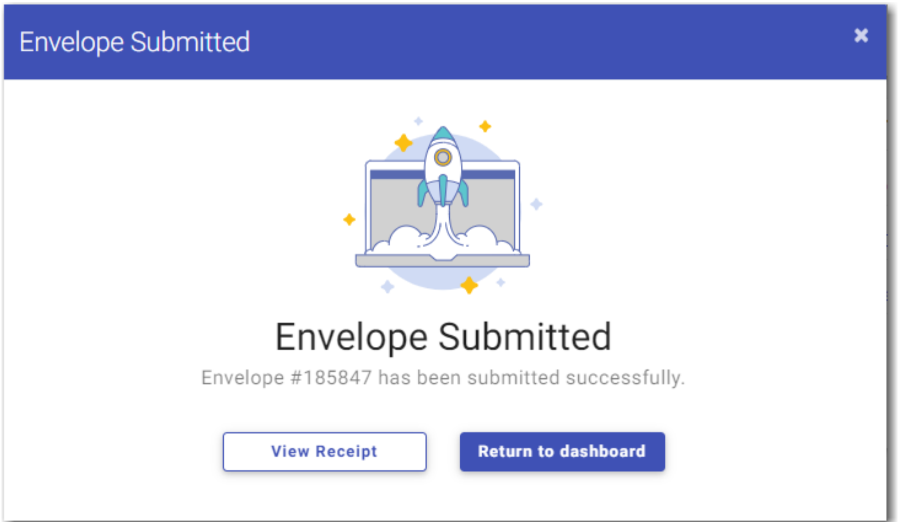


Figure 10.63 – Envelope Submitted Window

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

   - Click  . The *Printable Envelope Details* page is displayed in a separate tab. View the envelope details, and then close the tab.
   - Click  to return to the *Dashboard* page.
   - Click **x** to close the *Envelope Submitted* 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* page, the *Parties* page, the *Filings* page, and the *Fees* page.
2. After you have completed the fields in each section, from the *Fees* page, click  .

   The *Summary* page is displayed.

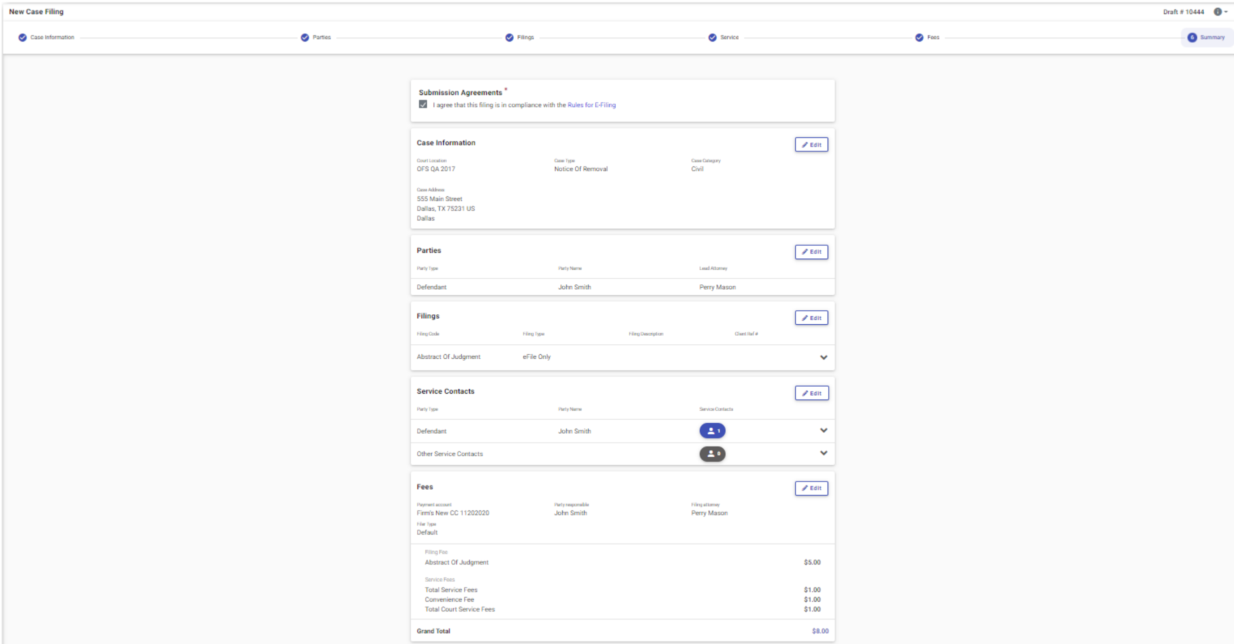


Figure 10.64 – Case Address Information on the Summary Page

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. If you want to change any information on the page, click 

in the pane in which you want to change the information.
5. After you are satisfied with the information in your filing, click 

.

   The *Envelope Submitted* window is displayed.

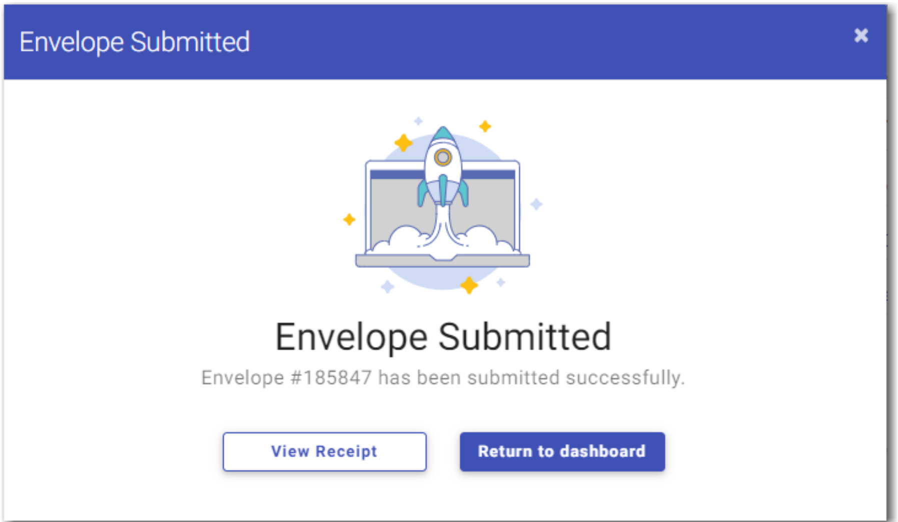


Figure 10.65 – Envelope Submitted Window

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

   - Click **View Receipt**. The *Printable Envelope Details* page is displayed in a separate tab. View the envelope details, and then close the tab.
   - Click **Return to dashboard** to return to the *Dashboard* page.
   - Click **x** to close the *Envelope Submitted* 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 File & Serve.

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

The case judicial officer information is available on the following pages:

- *Envelope Details* page for initial and subsequent filings

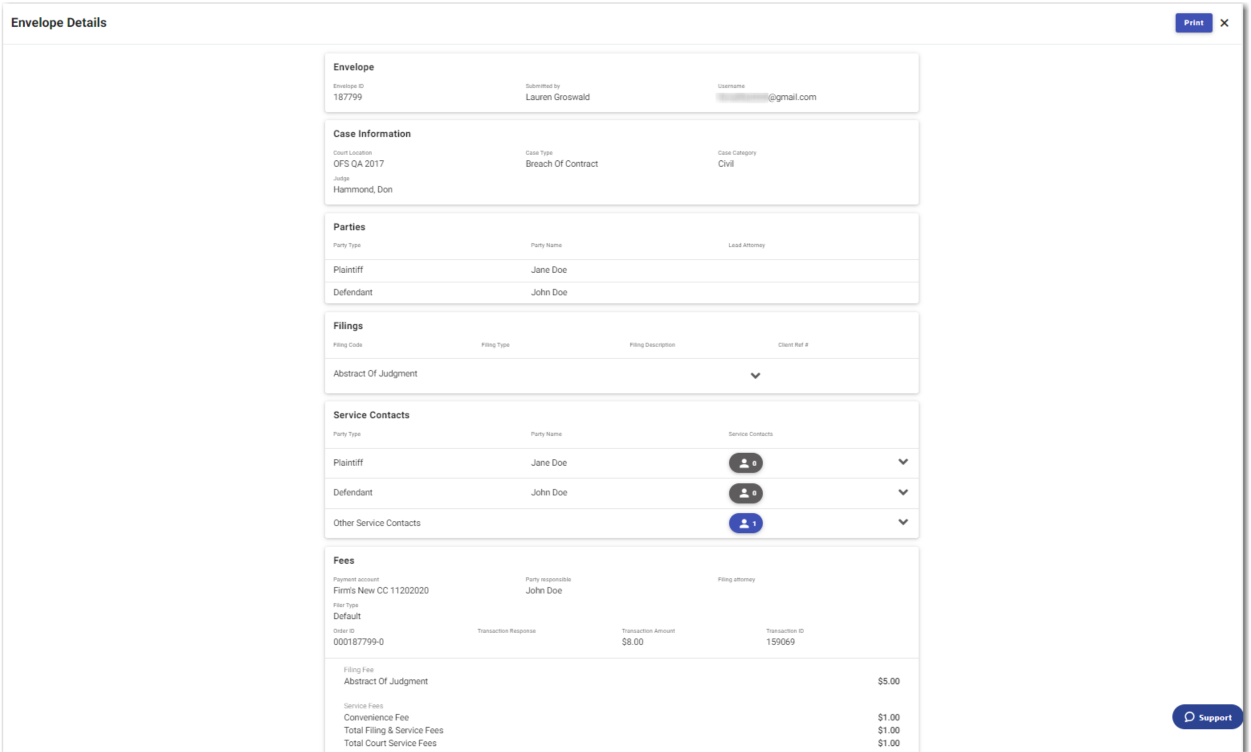


Figure 10.66 – Example of the Judge Information on the Envelope Details Page

- *Summary* page for subsequent filings

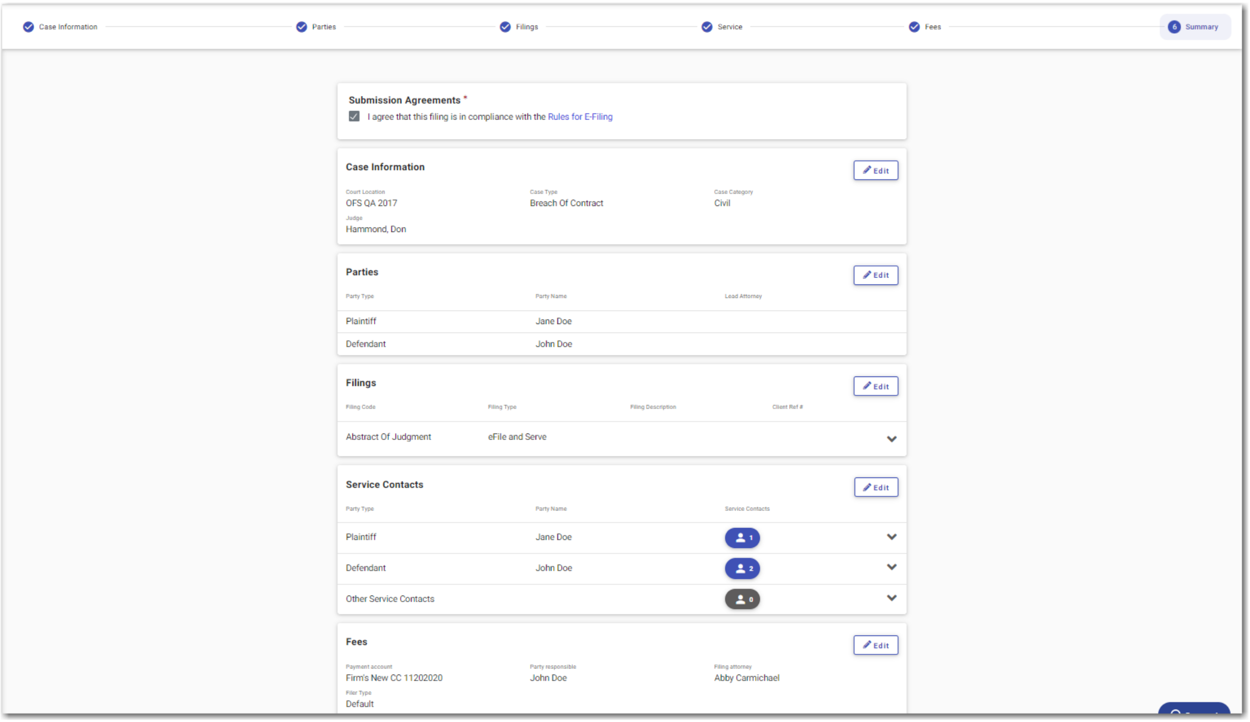


Figure 10.67 – Example of the Judge Information on the Summary Page

- *Case Information* page for subsequent filings

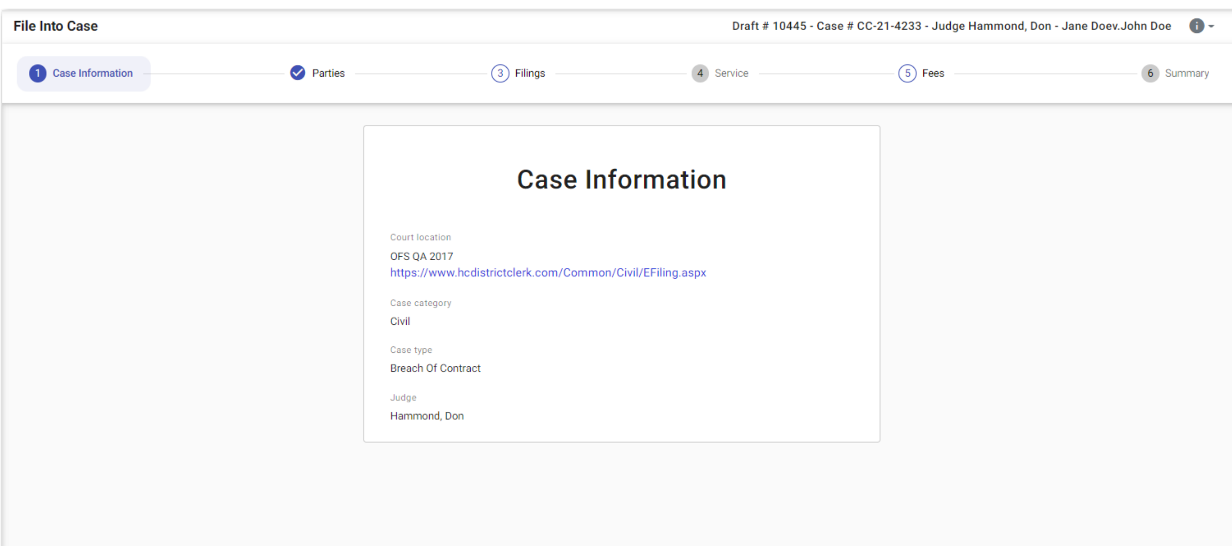


Figure 10.68 – Example of the Judge Information on the Case Information Page

- *Bookmarks* page for subsequent filings

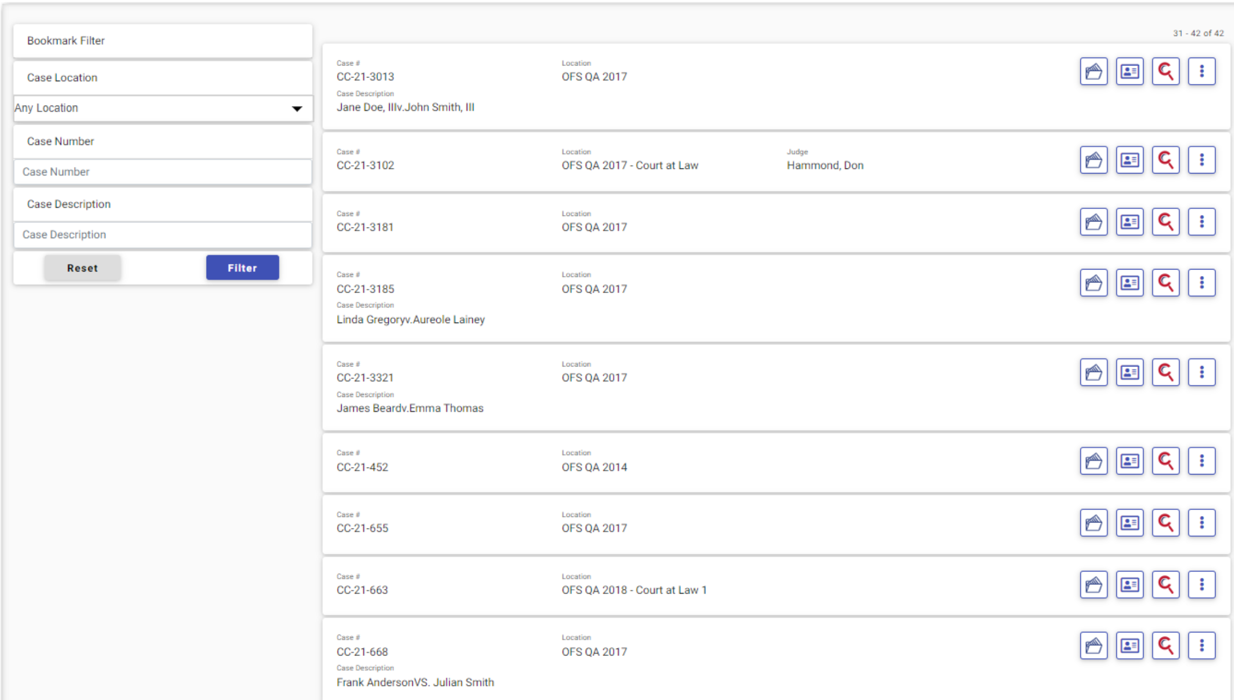


Figure 10.69 – Example of the Judge Information on the Bookmarks Page

Capability for Hearing Dates

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

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

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

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

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

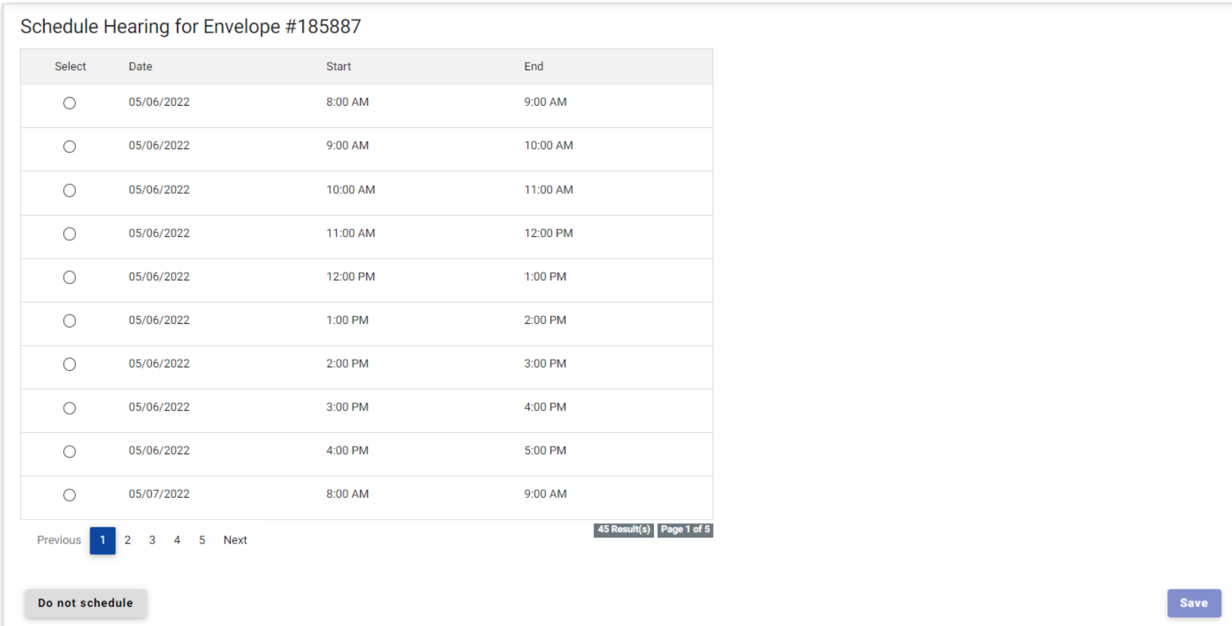
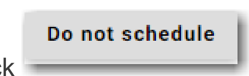


Figure 10.70 – Example of a Schedule Hearing Page

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

.

Scheduling a Hearing Date for a New Case Filing

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

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

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

To schedule a hearing for a new case filing:

1. From the *Dashboard* page, click 

.

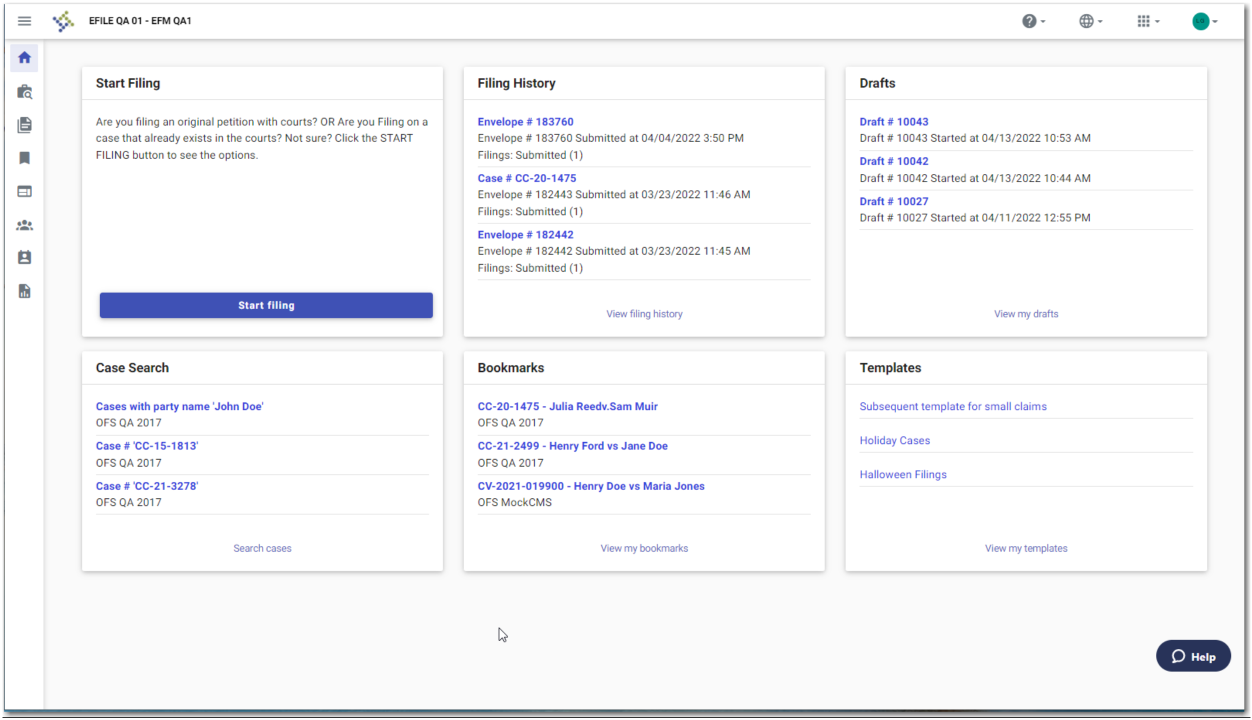


Figure 10.71 – Dashboard Page

The *Start Filing* page is displayed.

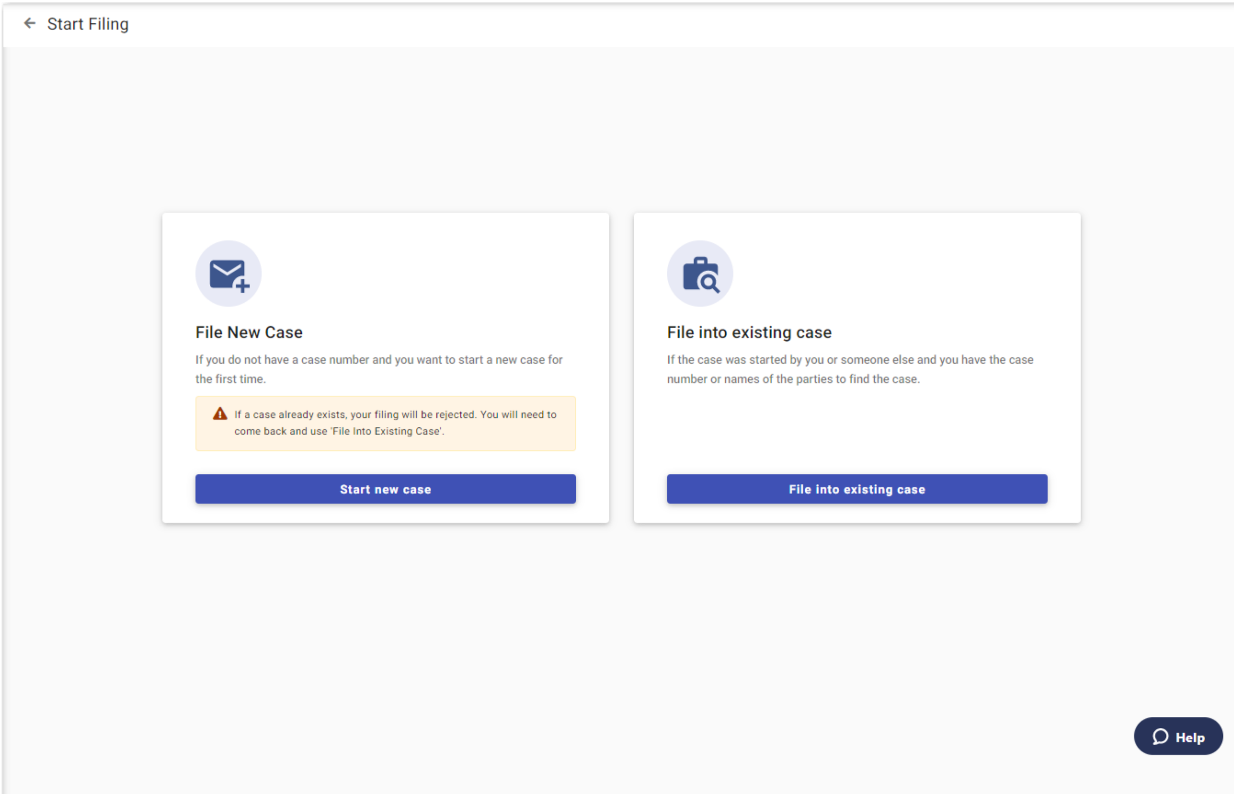


Figure 10.72 – Start Filing Page

2. Click 

.

   The *Case Information* page is displayed.

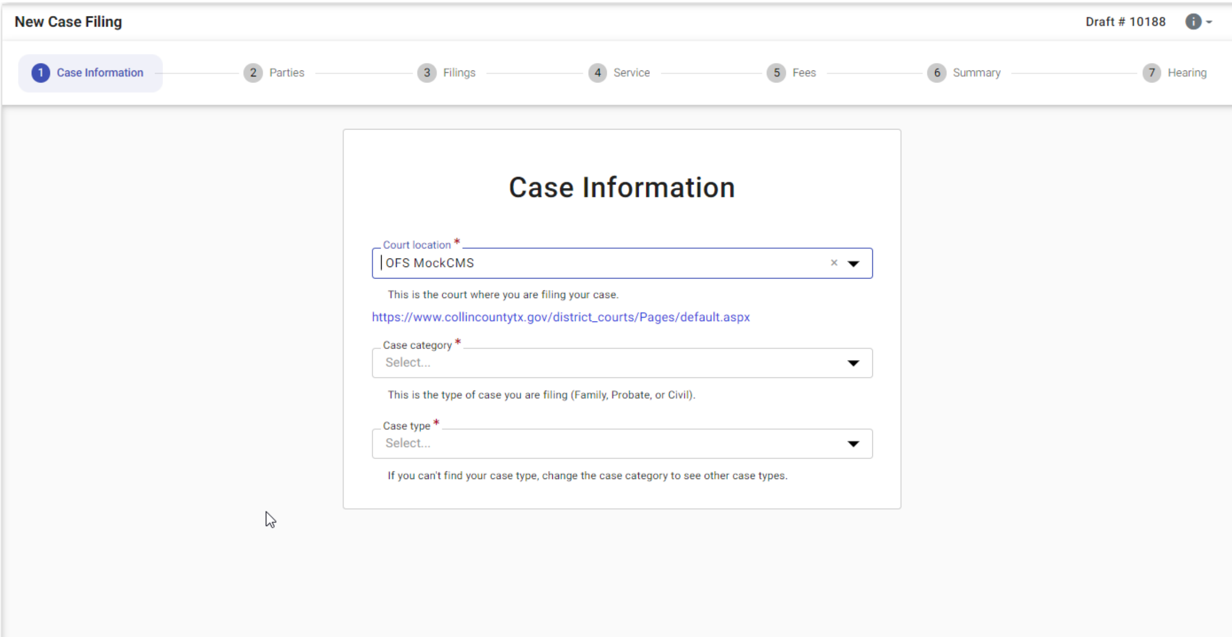


Figure 10.73 – Case Information Page

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

.

   The *Parties* page is displayed.

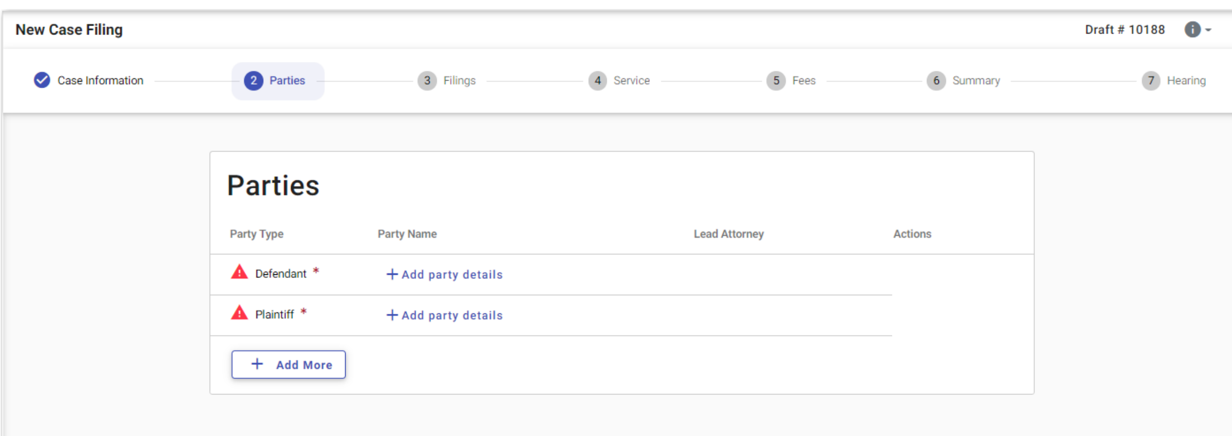


Figure 10.74 – Parties Page

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

.

   The *Filings* page is displayed.

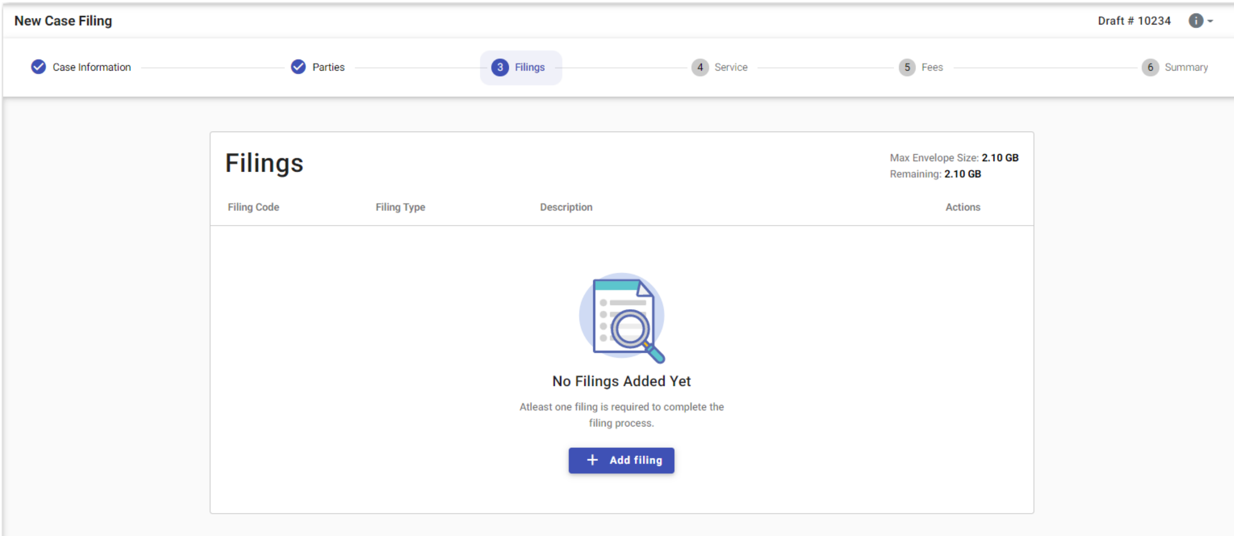


Figure 10.75 – Filings Page

5. On the *Filings* page, click **+ Add filing**. Then complete the required fields, as applicable.
6. Click **Service →**.

   The *Service* page is displayed.
7. Select the service contacts, and then click **Fees →**.

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

   The *Summary* page is displayed.

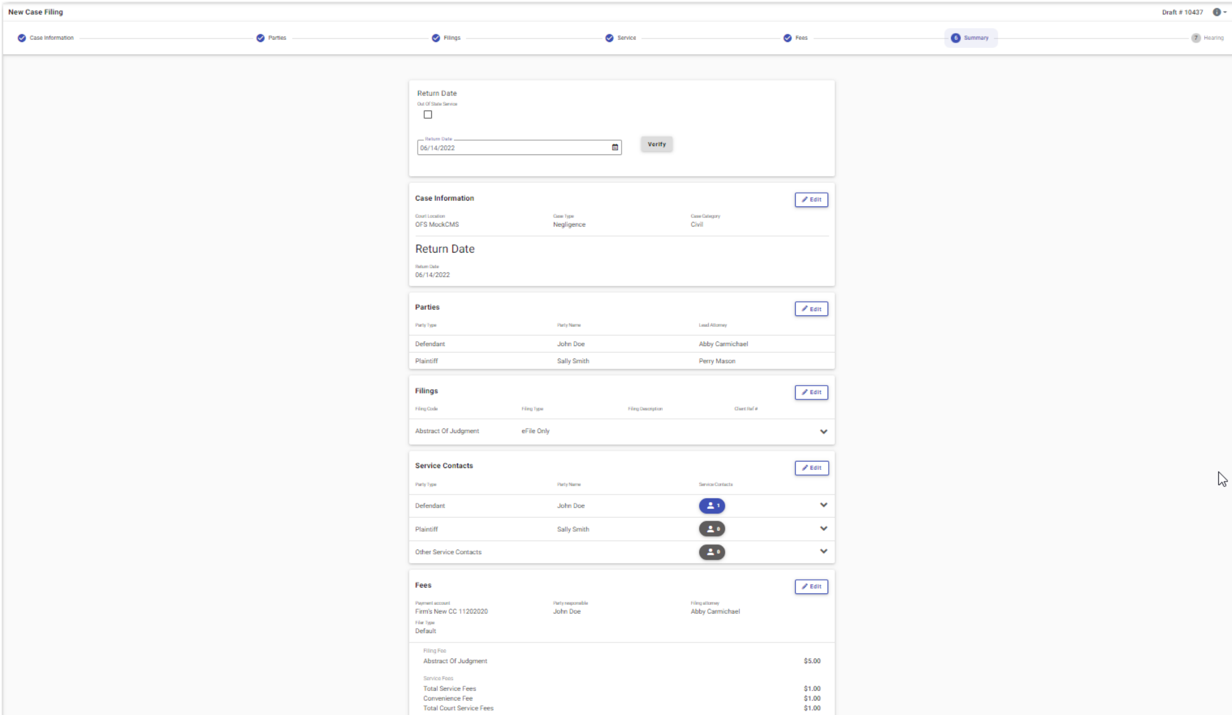
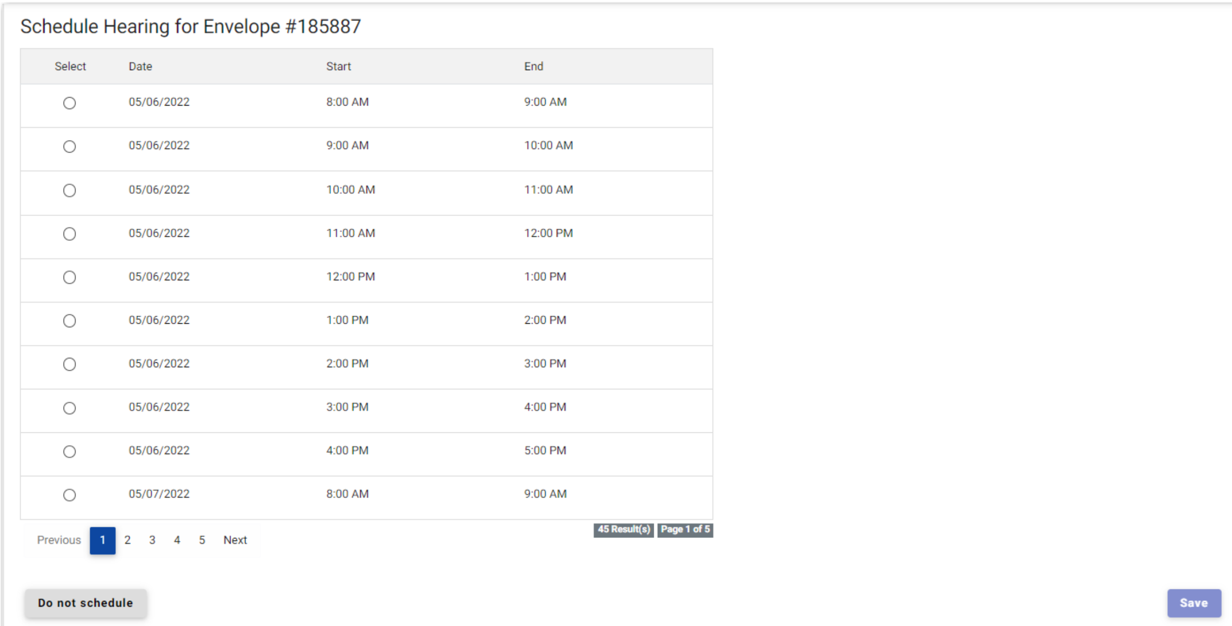


Figure 10.76 – Example of a Summary Page

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

.

   The *Schedule Hearing* window is displayed.



Schedule Hearing for Envelope #185887

Select	Date	Start	End
○	05/06/2022	8:00 AM	9:00 AM
○	05/06/2022	9:00 AM	10:00 AM
○	05/06/2022	10:00 AM	11:00 AM
○	05/06/2022	11:00 AM	12:00 PM
○	05/06/2022	12:00 PM	1:00 PM
○	05/06/2022	1:00 PM	2:00 PM
○	05/06/2022	2:00 PM	3:00 PM
○	05/06/2022	3:00 PM	4:00 PM
○	05/06/2022	4:00 PM	5:00 PM
○	05/07/2022	8:00 AM	9:00 AM

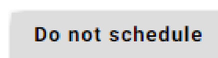
Figure 10.77 – Example of a Schedule Hearing Window

10. 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.

    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 for which the court has not yet reviewed the envelope.

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

To schedule a hearing for an existing case filing:

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

    The *Filing History* page is displayed.

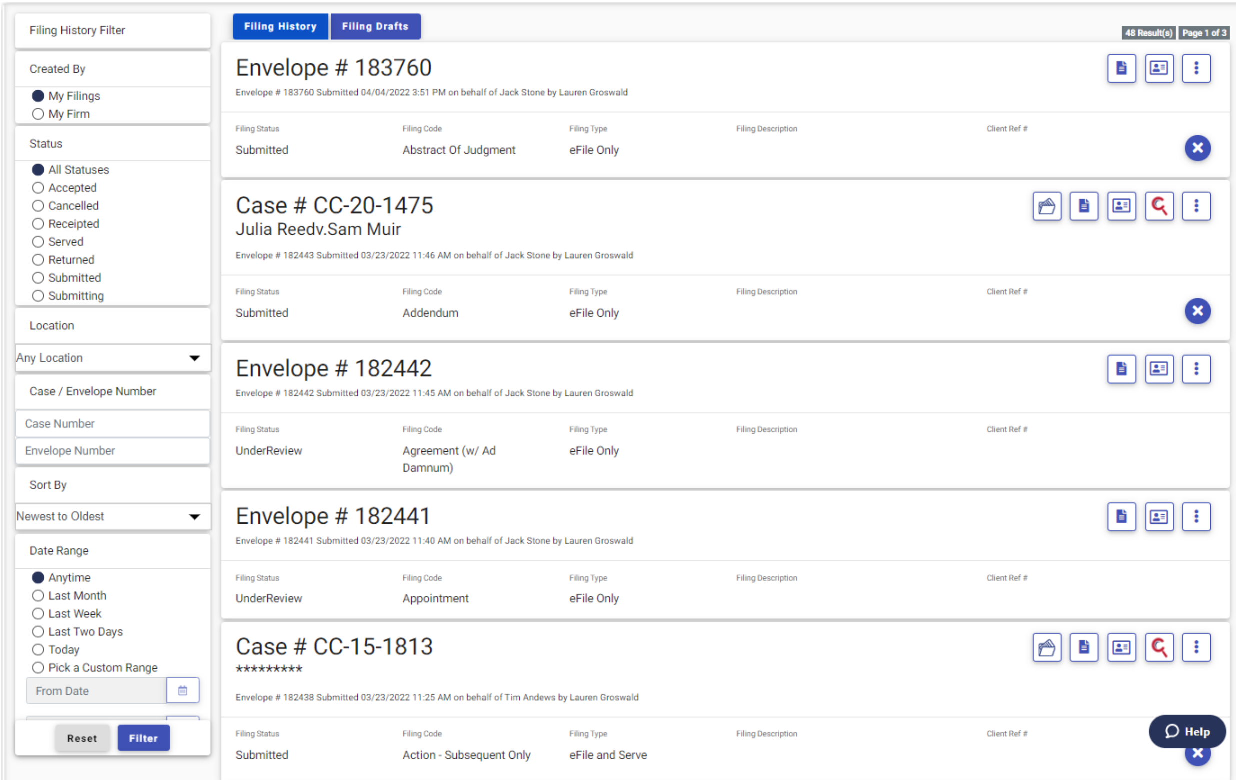


Figure 10.78 – Example of a Filing History Page

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

   The envelope details are displayed.

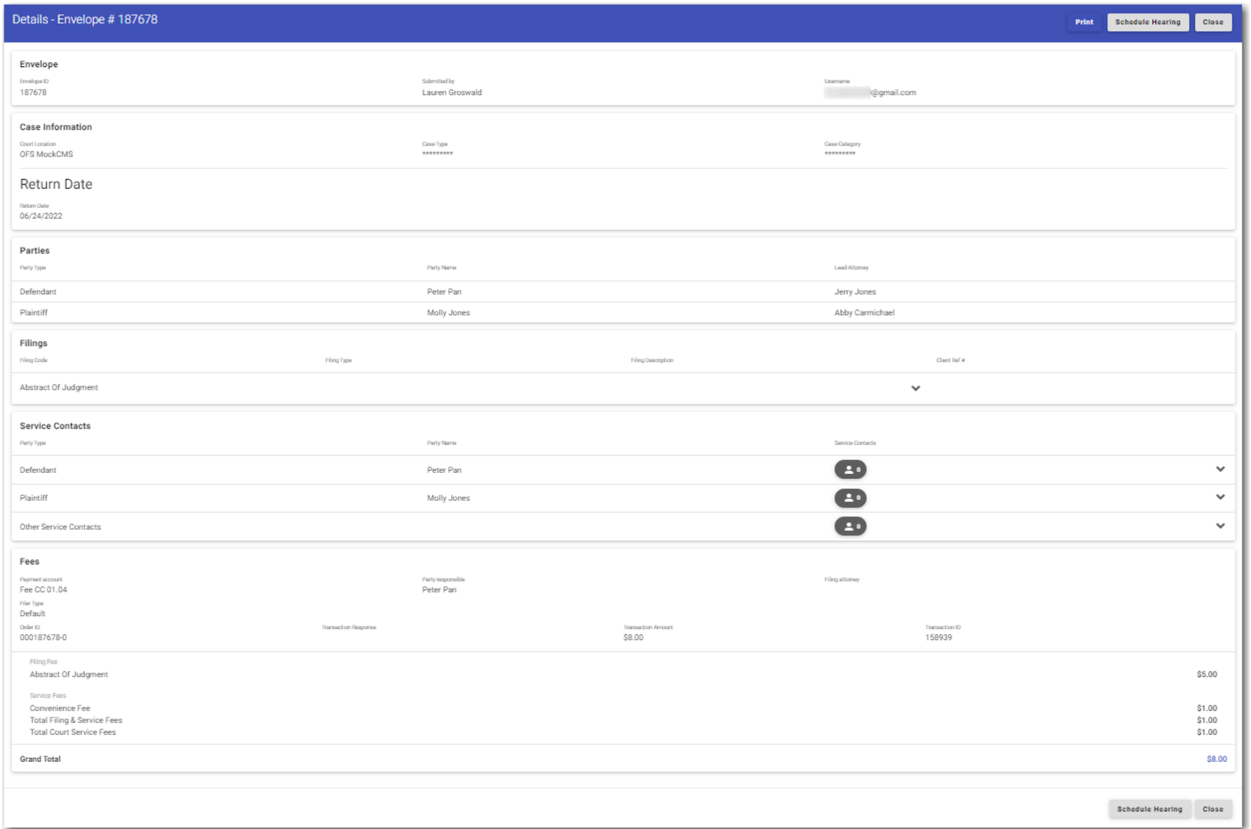
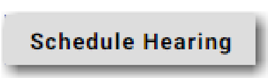
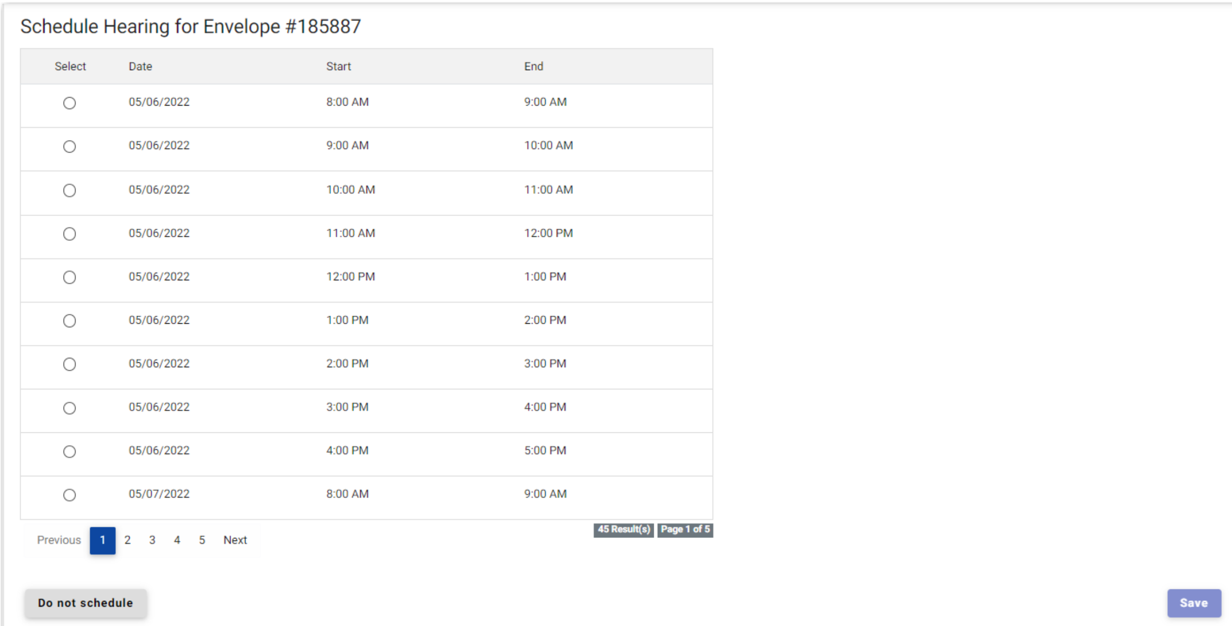


Figure 10.79 – Example of an Envelope Details Page

4. Click 

.

   The *Schedule Hearing* page is displayed.



Schedule Hearing for Envelope #185887

Select	Date	Start	End
○	05/06/2022	8:00 AM	9:00 AM
○	05/06/2022	9:00 AM	10:00 AM
○	05/06/2022	10:00 AM	11:00 AM
○	05/06/2022	11:00 AM	12:00 PM
○	05/06/2022	12:00 PM	1:00 PM
○	05/06/2022	1:00 PM	2:00 PM
○	05/06/2022	2:00 PM	3:00 PM
○	05/06/2022	3:00 PM	4:00 PM
○	05/06/2022	4:00 PM	5:00 PM
○	05/07/2022	8:00 AM	9:00 AM

Previous 1 2 3 4 5 Next

45 Result(s) Page 1 of 5

Do not schedule

Save

Figure 10.80 – Example of a Schedule Hearing Page

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.

11 Auto Generated Documents

Topics covered in this chapter

File & Serve automatically generates some case-related documents based on configuration. When auto generation of documents is 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: The Auto Generated Documents feature is configured by Tyler and may not be available on your system.

Note: The Auto Generated Documents 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 of the 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 the Civil Domestic Information feature is configured, you can enter additional data for an initial filing on the *Case Information* page.

Note: The Civil Domestic Information feature is configured by Tyler and may not be available on your system. In addition, some of the fields described in this section may not be displayed on your system.

Note: The Civil Domestic Information feature is used when the case category is for a civil or family case.

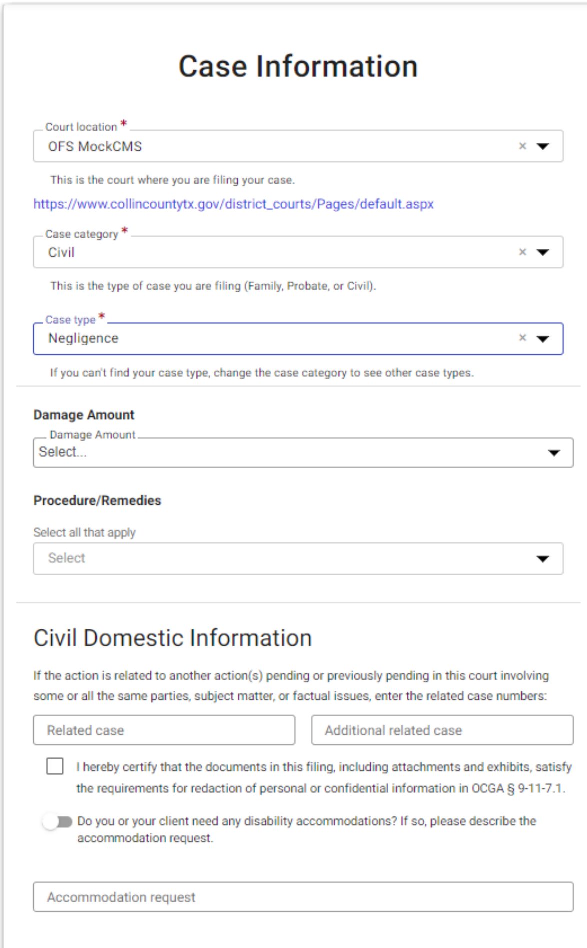


Figure 11.1 – Civil Domestic Information Section on the Case Information Page

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

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

1. Select the location from the **Court 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. In the **Damage Amount** section, if applicable, select the damages amount from the **Damage Amount** drop-down list.
5. In the **Procedure/Remedies** section, select the appropriate procedures or remedies from the drop-down list.
6. In the **Civil Domestic Information** section, enter any related case numbers in the **Related case** field.
7. Enter additional related case numbers in the **Additional related case** field.
8. Select each check box that is applicable.

9. If there is a disability accommodation to note, describe the accommodation in the **Accommodation request** field.

10. Click 

 to save your work and continue.

Entering Service of Process Information on the Parties Page

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

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

Note: The Service of Process feature is used when the case category is for a civil or family case.

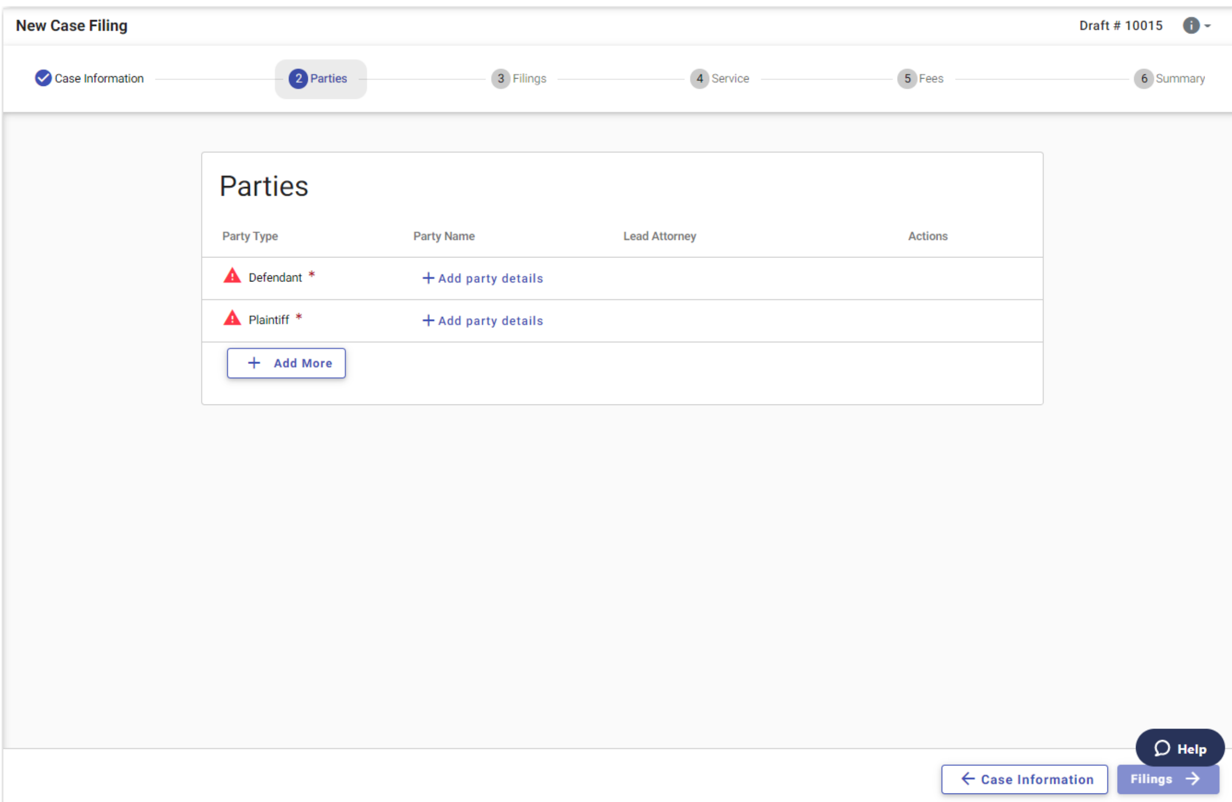


Figure 11.2 – Example of a Parties Page

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

1. On the *Parties* page, select the party type that you want to begin to describe, and then click 

.

   The *Edit Party Details* window for the specified party is displayed.

2. Click either **Person** or **Entity**.

   Note: The following steps describe the fields that are displayed if you select "Person."

3. In the Party Information pane, 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.
4. Type the party's date of birth in the **Date of Birth** field, or click to select the date from the calendar.
5. Type the party case management system identification (ID) in the **Party CMS ID** field, if appropriate.
6. Select a language from the **Interpreter** drop-down list, if appropriate.
7. Select the type of driver's license from the **Drivers License Type** drop-down list.
8. Select the state where the driver's license was issued from the **Drivers License State** drop-down list.
9. Type the party's driver's license number in the **Drivers License Number** field.
10. 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.

11. Select the party's gender from the **Gender** drop-down list.
12. If available, select an option from the **Service of Process** drop-down list.
13. In the Contact Information pane, enter the country, address, city, state, ZIP code, and phone number for the specified party.
14. In the Attorney Information pane, from the **Lead Attorney** drop-down list, select the filing attorney.
15. From the next field that is displayed, select additional attorneys, if any, that you want to add to the case.
16. After all of the required fields for the specified party are completed, click **Save**.
17. On the *Parties* page, complete the party information for the next party.
18. If you have another party to add to the case, click **+ Add More**, and complete the party information for the additional party. Continue to add parties until all of the parties have been added to the case.
19. Click **Filings →** to save your work and continue.

Entering Filing Details for Service of Process Cases

You can enter the filing details on the *Filings* page. 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: The Auto Generated Documents feature is configured by Tyler and may not be available on your system.

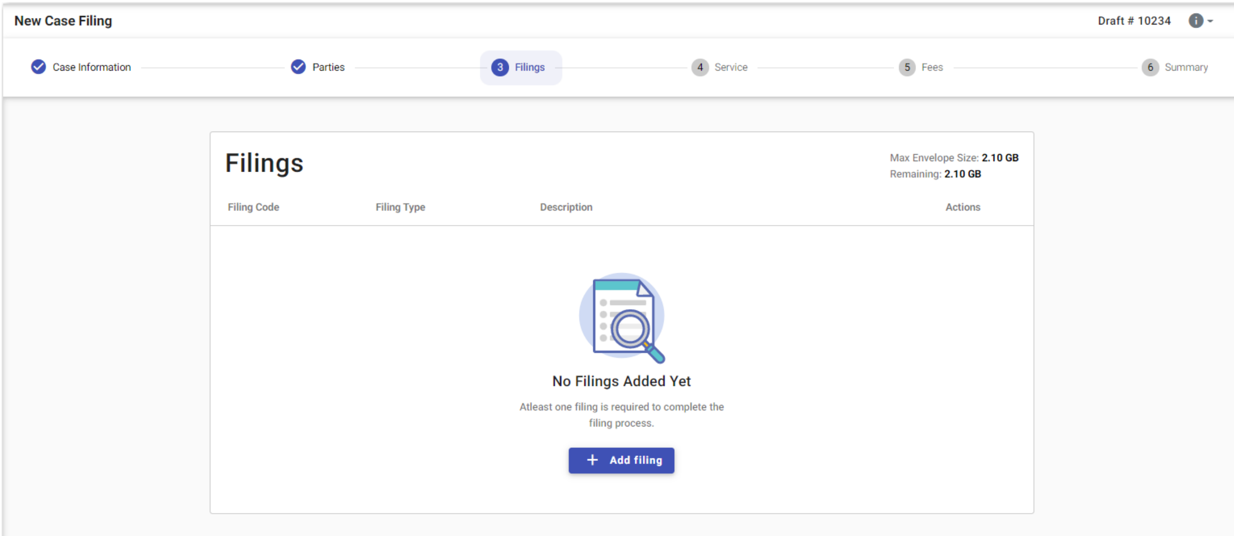
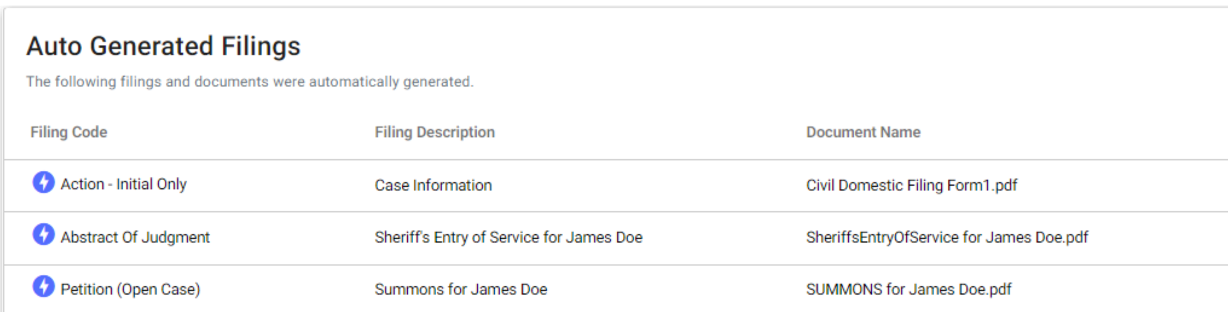


Figure 11.3 – Filings Page



Auto Generated Filings

The following filings and documents were automatically generated.

Filing Code	Filing Description	Document Name
Action - Initial Only	Case Information	Civil Domestic Filing Form1.pdf
Abstract Of Judgment	Sheriff's Entry of Service for James Doe	SheriffsEntryOfService for James Doe.pdf
Petition (Open Case)	Summons for James Doe	SUMMONS for James Doe.pdf

Figure 11.4 – Example of an Auto Generated Filings Pane

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

To enter the filing details:

1. On the *Filings* page, click 

.

   The *Edit Filing Details* page is displayed.

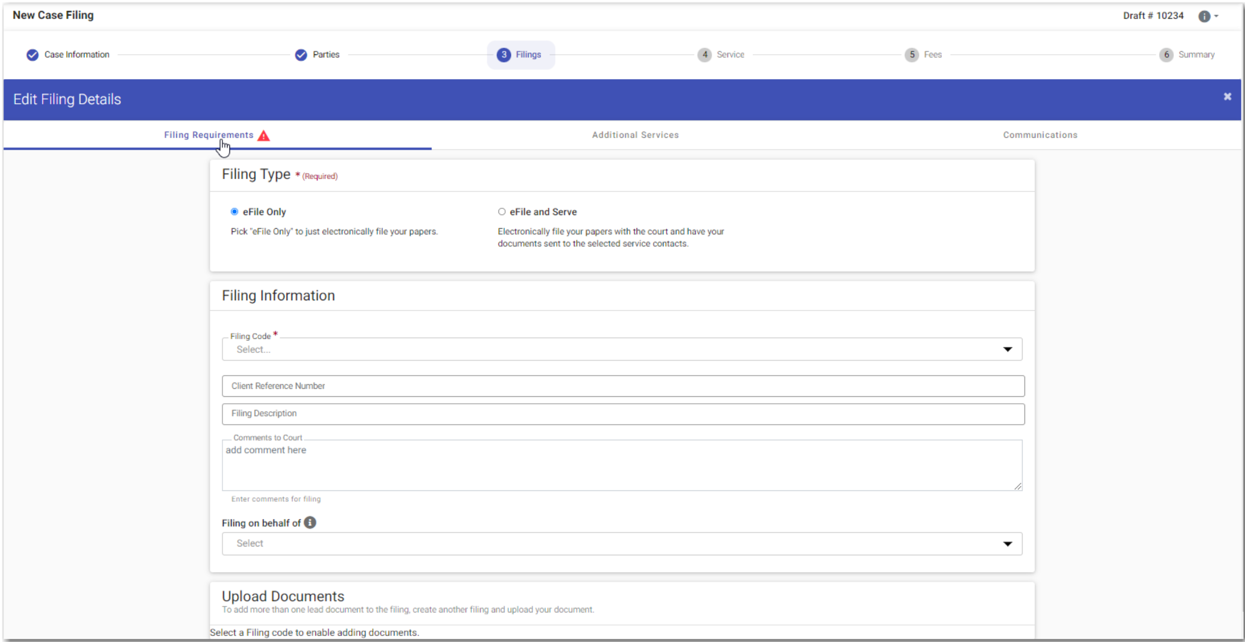
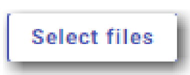


Figure 11.5 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.
5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.
8. In the Upload Documents pane, click 

. Then, select the document that you want to upload.

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

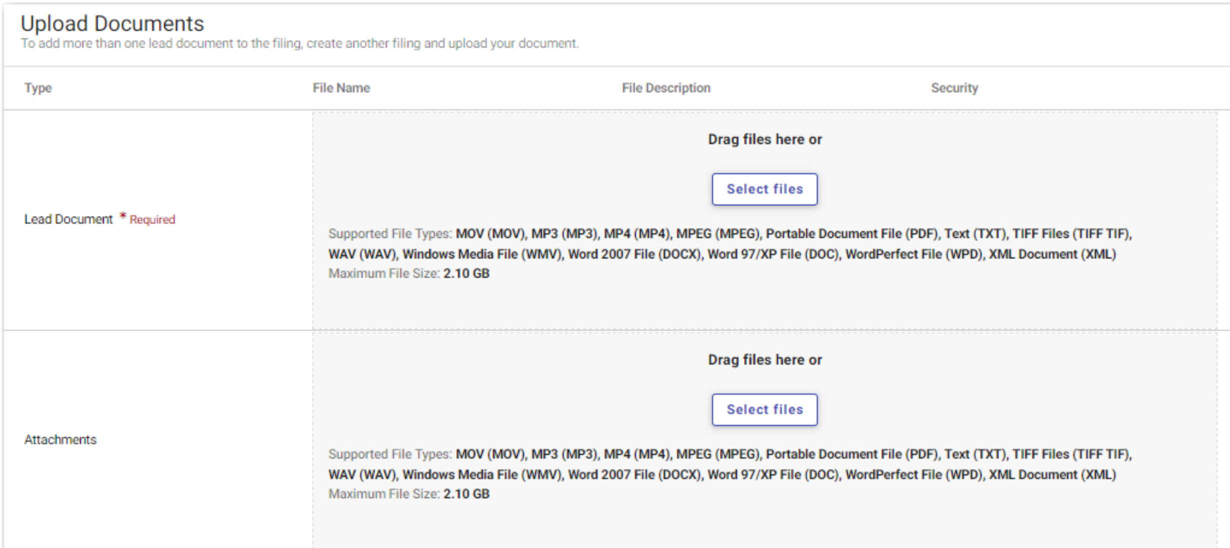


Figure 11.6 – Upload Documents Pane

9. If you have attachments to add to the filing, click **Select files** in the **Attachments** section. Then, upload the specified attachments.
10. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
11. To add additional services, click **Additional Services**.

    The Additional Services pane is displayed.

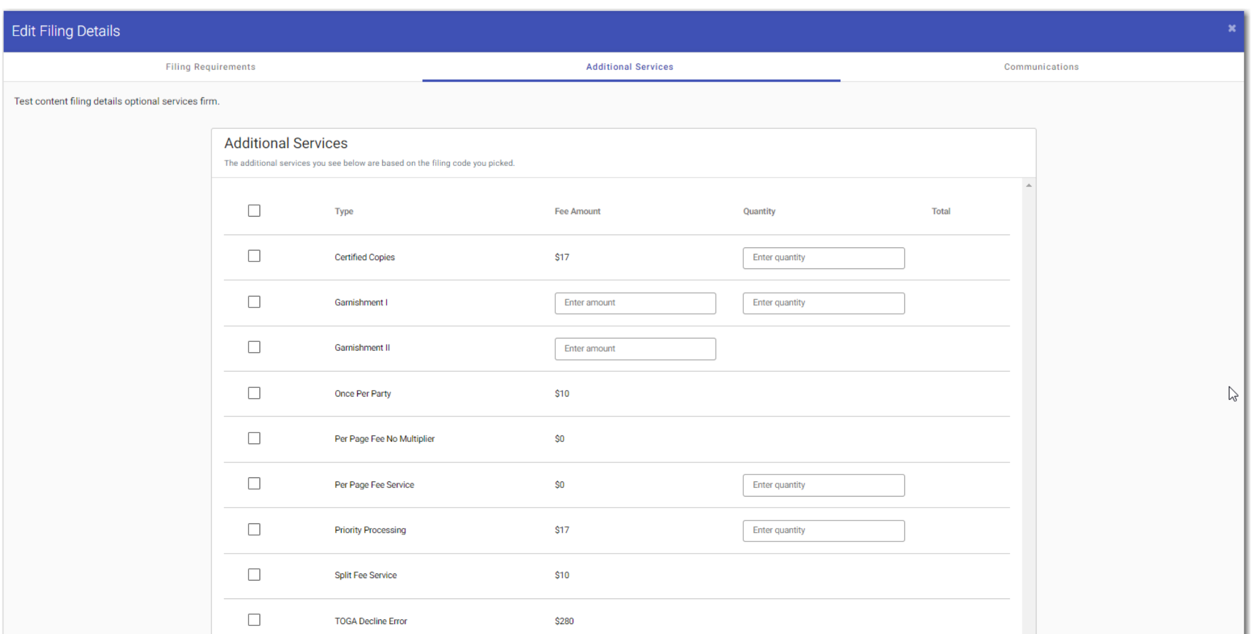
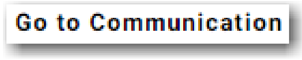


Figure 11.7 – Additional Services Pane on the Edit Filing Details Page

12. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

13. Click  , or click **Communications** at the top of the page.

    The Communications pane is displayed.

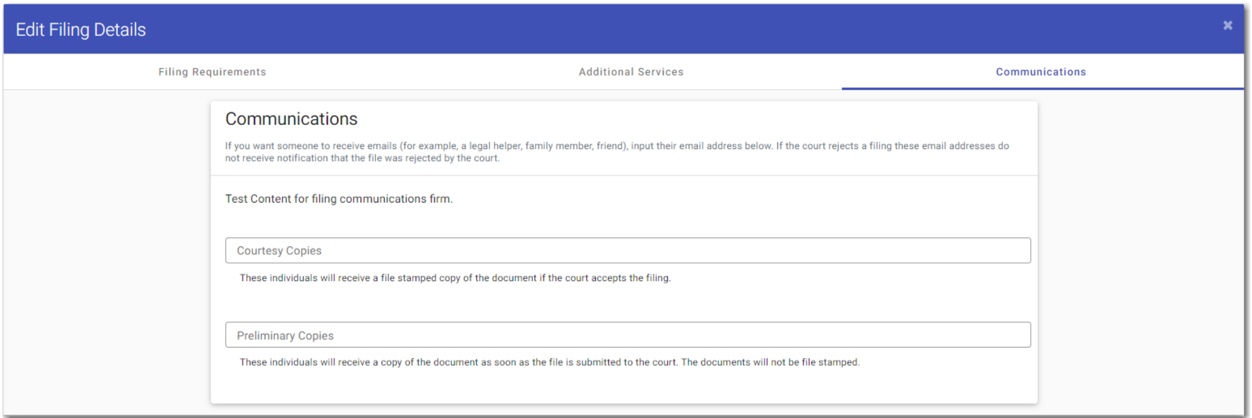


Figure 11.8 – Communications Pane on the Edit Filing Details Page

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

15. Click  .

16. If you want to add another filing, on the *Filings* page, click  . Then, repeat the same steps for the next filing.

17. After you have added all of the filings, click  .

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.

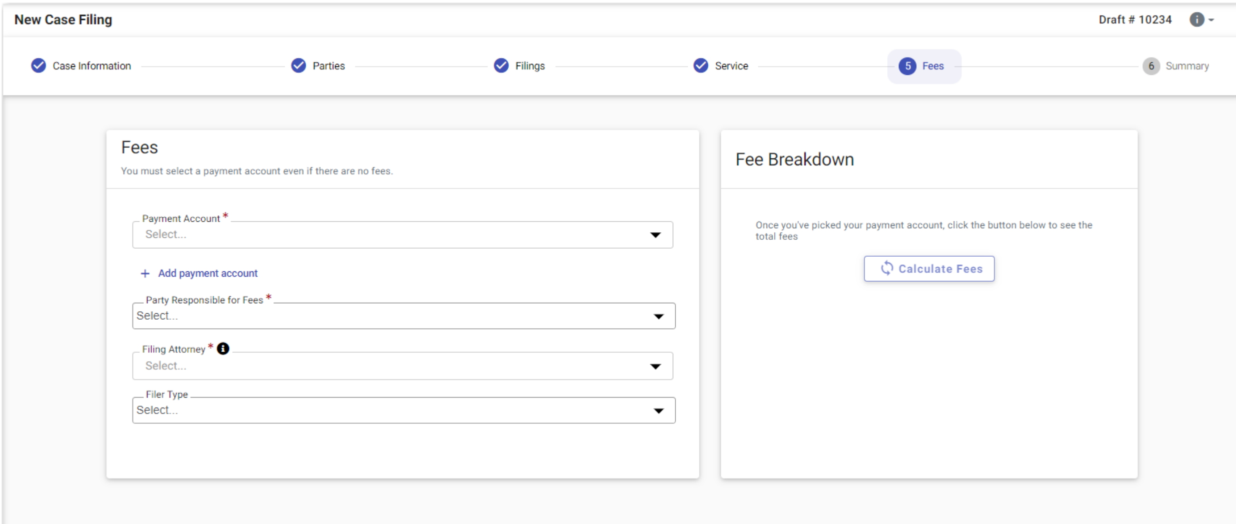


Figure 11.9 – Example of a Fees Page

To enter the payment information for your filing:

1. Select the payment account from the **Payment Account** drop-down list.

   If you do not have an existing payment account, click + Add payment account. Additional fields are displayed. Then, follow the steps to create a new payment account.

   Refer to the following topics for details on creating the various types of payment accounts:

   - Adding a Credit Card Payment Account, page 53
   - Adding an E-Check Payment Account, page 57
   - Adding a Draw-Down Account, page 61

2. 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.

3. Select the filing attorney from the **Filing Attorney** drop-down list.
4. Select the filer type from the **Filer Type** drop-down list.
5. In the Fee Breakdown pane, click Calculate Fees.

   The fees for the filing are displayed.

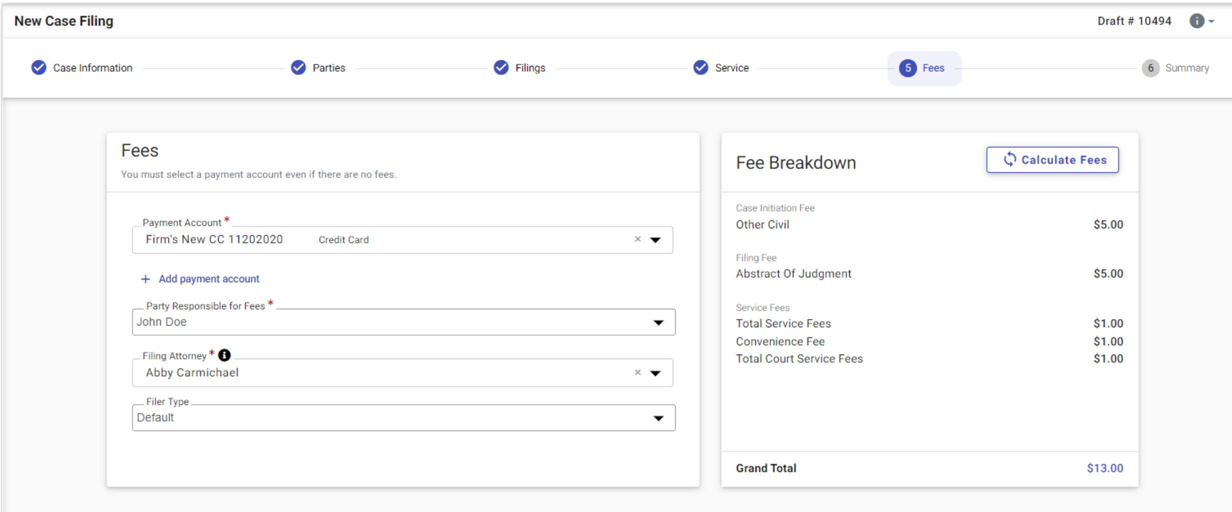


Figure 11.10 – Example of a Fees Page with the Filing Fees Displayed

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.

6. 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: The Service of Process feature and the Auto Generated Documents feature are 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* page, the *Parties* page, the *Filings* page, and the *Fees* page.
2. After you have completed the fields in each section, from the *Fees* page, click .

   The *Summary* page is displayed.

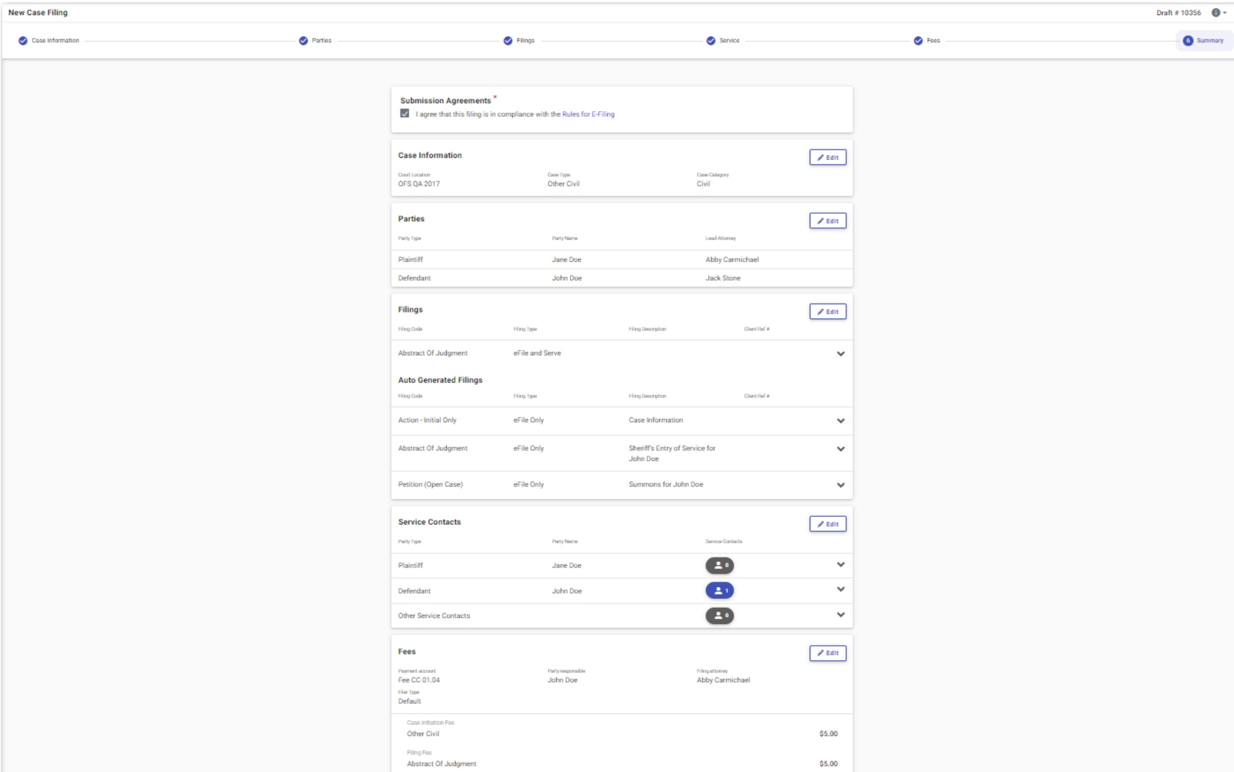


Figure 11.11 – Example of a Summary Page

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. If you want to change any information on the page, click **Edit** in the pane in which you want to change the information.
5. After you are satisfied with the information in your filing, click **Submit**.

   The *Envelope Submitted* window is displayed.

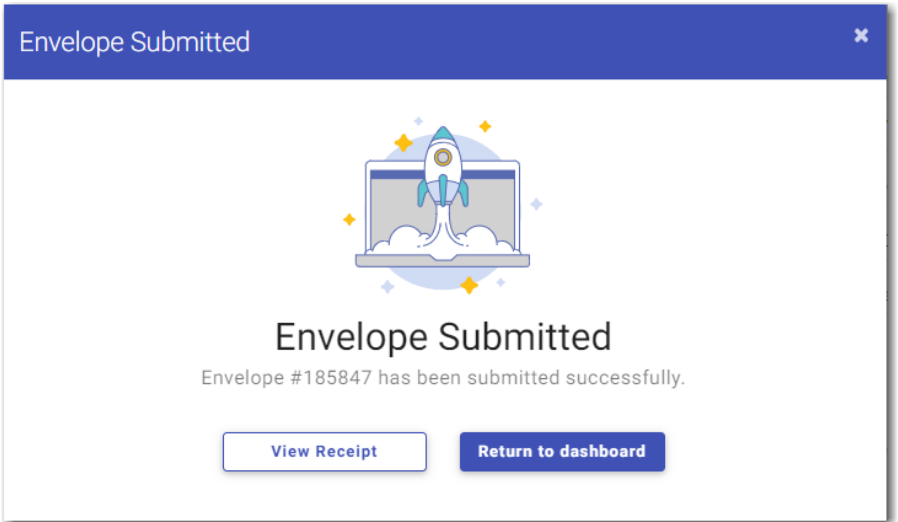


Figure 11.12 – Envelope Submitted Window

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

   - Click 

. The *Printable Envelope Details* page is displayed in a separate tab. View the envelope details, and then close the tab.
   - Click 

 to return to the *Dashboard* page.
   - Click **x** to close the *Envelope Submitted* 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: The Service of Process feature and the Auto Generated Documents feature are configured by Tyler and may not be available on your system.

To view the envelope details:

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

   The *Filing History* page is displayed.

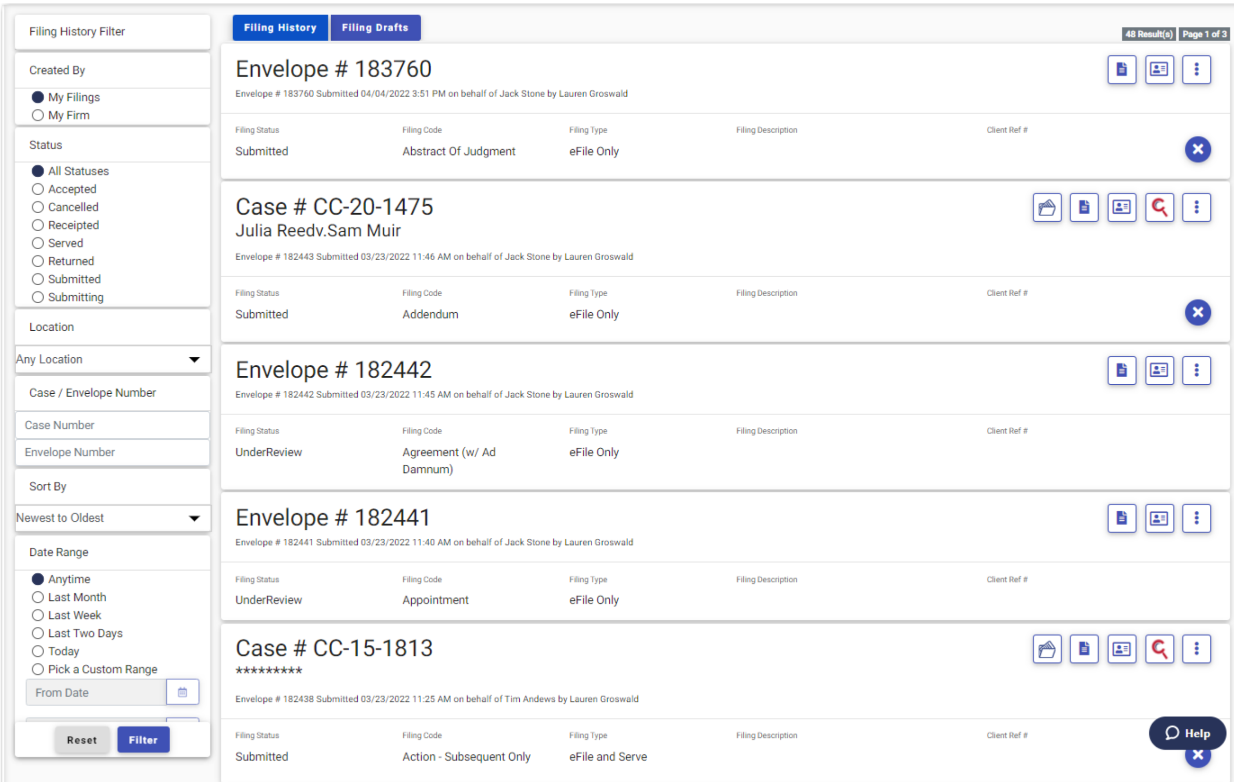


Figure 11.13 – Filing History Page

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

3. Click .

   The envelope details are displayed.

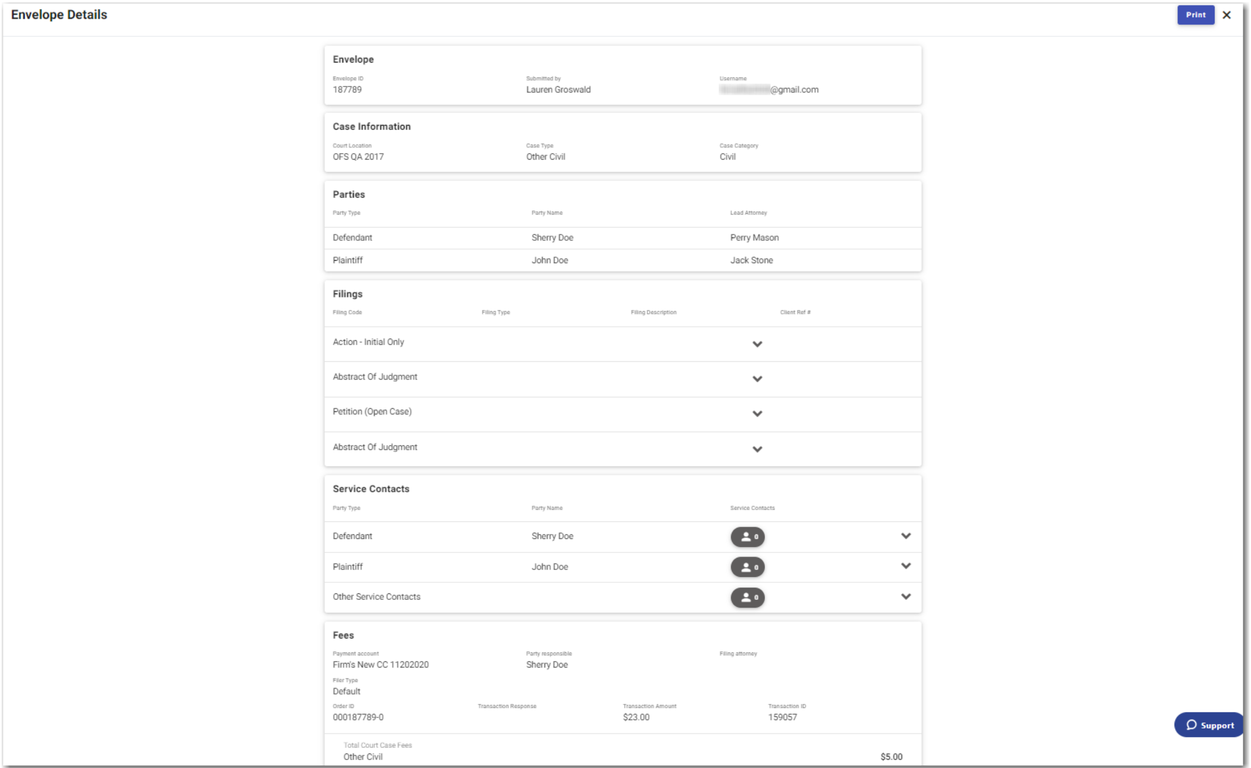


Figure 11.14 – Example of an Envelope Details Page

4. Click 

to print a copy of the envelope details.

12 Redaction Feature

Topics covered in this chapter

File & Serve 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 and to perform redactions. The icons that are visible in the Redaction Editor may differ slightly from the screen shots shown 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, on the *Fees* page, on 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:

1. On the *Dashboard* page, click **Start filing**.

   The *Start Filing* page is displayed.

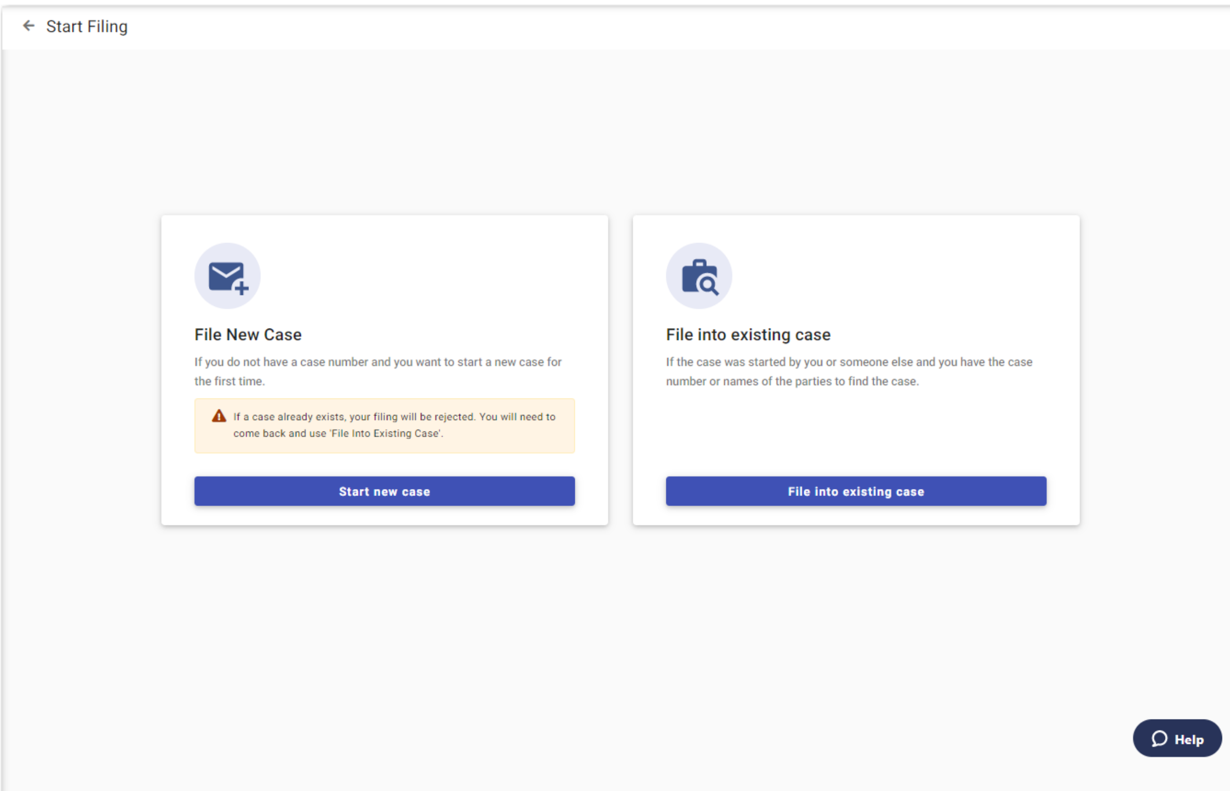


Figure 12.1 – Start Filing Page

2. Click **Start new case**.

   The *Case Information* page is displayed.

3. Complete the required fields on the *Case Information* page, and then click **Parties →**.

   The *Parties* page is displayed.

4. Complete the required fields on the *Parties* page, and then click **Filings →**.

The *Filings* page is displayed.

5. On the *Filings* page, complete the required fields. Upload a lead document and attachments, if applicable. Then, click Auto-Redact.

   Note: When your document has been successfully redacted, a green message is displayed, indicating that the redaction was completed. The message also indicates how many redactions were performed.

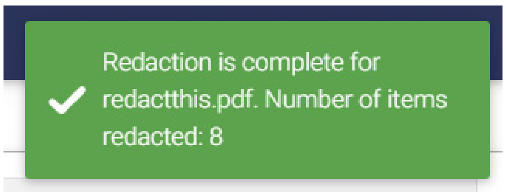


Figure 12.2 – Example of a Message for a Completed Redaction

6. After you have completed all of the required fields on the *Filings* page and uploaded the applicable documents, click Service →.

   The *Service* page is displayed.

7. Complete the required fields on the *Service* page, and then click Fees →.

   The *Fees* page is displayed.

8. Complete the required fields on the *Fees* page, and then click Summary →.

   The *Summary* page is displayed.

9. Review the envelope summary. If you want to edit the redacted document, click Edit Redactions.

   The Redaction Editor opens in a new tab in your browser.

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

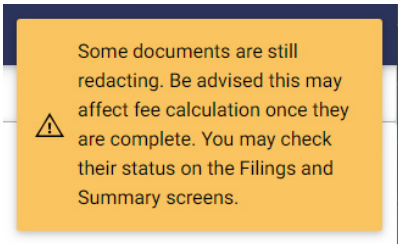


Figure 12.3 – Example of a Message with Redaction in Progress

10. 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.
11. When you are done reviewing the envelope summary and have selected the check boxes for the submission agreements (if applicable), click 

.

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

Deleting a Redaction

After you mark a section to be redacted and before you close the Redaction Editor, 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.

To delete a redaction in a document before you have closed the Redaction Editor:

1. Right-click the specified redaction.

   The *Annotation Notes* dialog box is displayed.

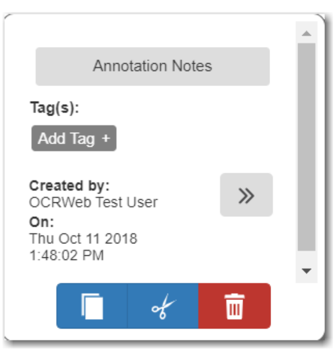


Figure 12.4 – Annotation Notes Dialog Box

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

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

2. Click to delete the redaction.

   The *Delete Annotation* dialog box is displayed.

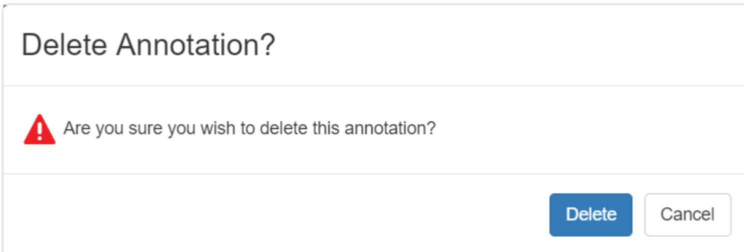


Figure 12.5 – Delete Annotation? Dialog Box

3. Click to delete the specified redaction.

Working with an Existing Redaction

You can resize or move an existing redaction in the Redaction Editor.

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.

To work with an existing redaction:

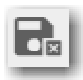
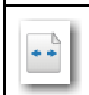
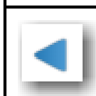
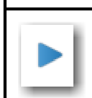
1. Turn off the manual redaction capability by clicking .
2. Locate the existing redaction that you want to resize or move, and then click the block of text.
3. Resize the redaction, or move the redaction to another location in the document.
4. When you are done, click to save your changes, or click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

Redaction Editor Toolbar

You can use icons to navigate in the Redaction Editor.

Note: The icons that are visible in the Redaction Editor may differ slightly from the screen shots contained in this document.

The following table describes the icons in the Redaction Editor.

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

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

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

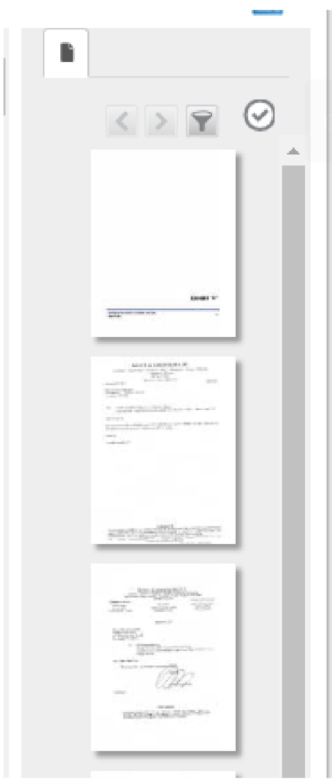
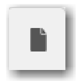
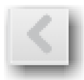


Figure 12.6 – Example of a Thumbnail Pane

The following table describes the icons in the thumbnail pane.

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

13 File into an Existing Case

Topics covered in this chapter

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

There are various ways to file into an existing case, as follows:

- On the *Dashboard* page, select one of the following methods to access the *File into Existing Case* window:
  - Click **Start filing**. On the *Start Filing* page that is displayed, click **File into existing case**.
  - Click **Search cases**.

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

Filing into an Existing Case from the Dashboard Page

You can file into an existing case from the *Dashboard* page by using any one of several methods.

To file into an existing case from the *Dashboard* page:

1. From the *Dashboard* page, select one of the following methods to begin:
   - Click **Start filing**. On the *Start Filing* page that is displayed, click **File into existing case**.
   - Click **Search cases**.

   The *File into Existing Case* window is displayed.

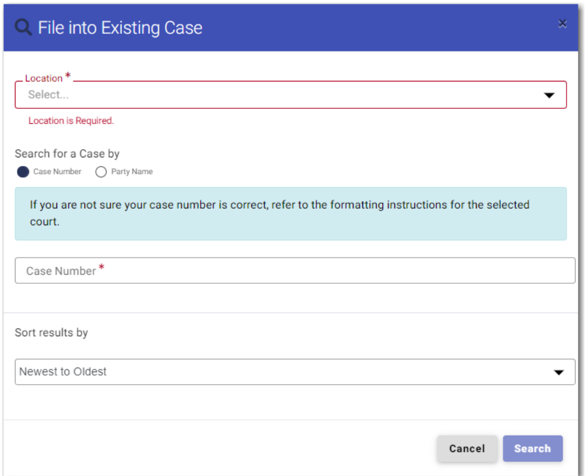


Figure 13.1 – Example of a File into Existing Case Window

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

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

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

   The case that matches your search criteria is displayed.

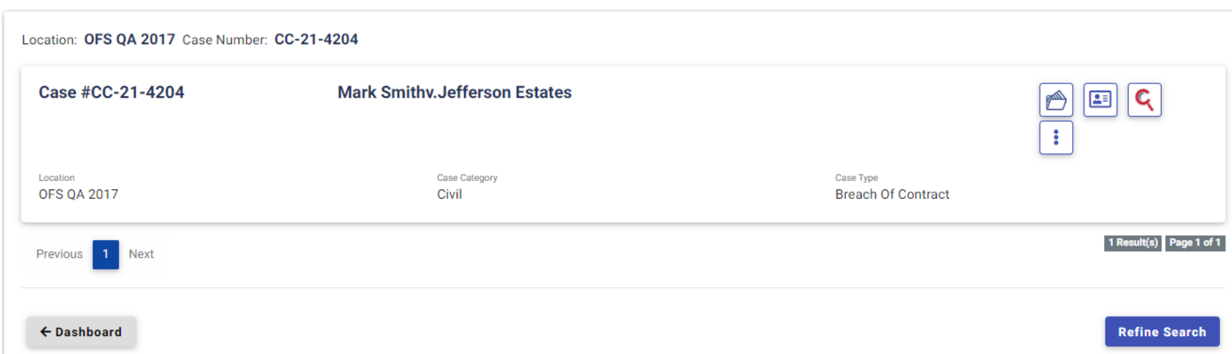


Figure 13.2 – Case Search Results

3. Click  to file into the case.

   The *Case Information* page of the specified case is displayed.

4. Verify the information on the *Case Information* page. Make any changes, if applicable. Then, click **Parties →**.

   The *Parties* page is displayed.

5. Add additional parties to the case if you want.

Note: The ability to add a new party to an existing case is configured by Tyler. If your system is configured with this capability, 

is displayed on the *Parties* page.

6. Click 

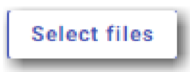
.

   The *Filings* page is displayed.

7. On the *Filings* page, click 

.

   The *Edit Filing Details* page is displayed.

8. In the Filing Type pane, select the filing type option.
9. Select the filing type from the **Filing Type** drop-down list.
10. In the Filing Information pane, select the filing code from the **Filing Code** drop-down list.
11. Type a client reference number in the **Client Reference Number** field.
12. Type a description in the **Filing Description** field.
13. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
14. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.
15. In the Upload Documents pane, click 

. Then, select the document that you want to upload.

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

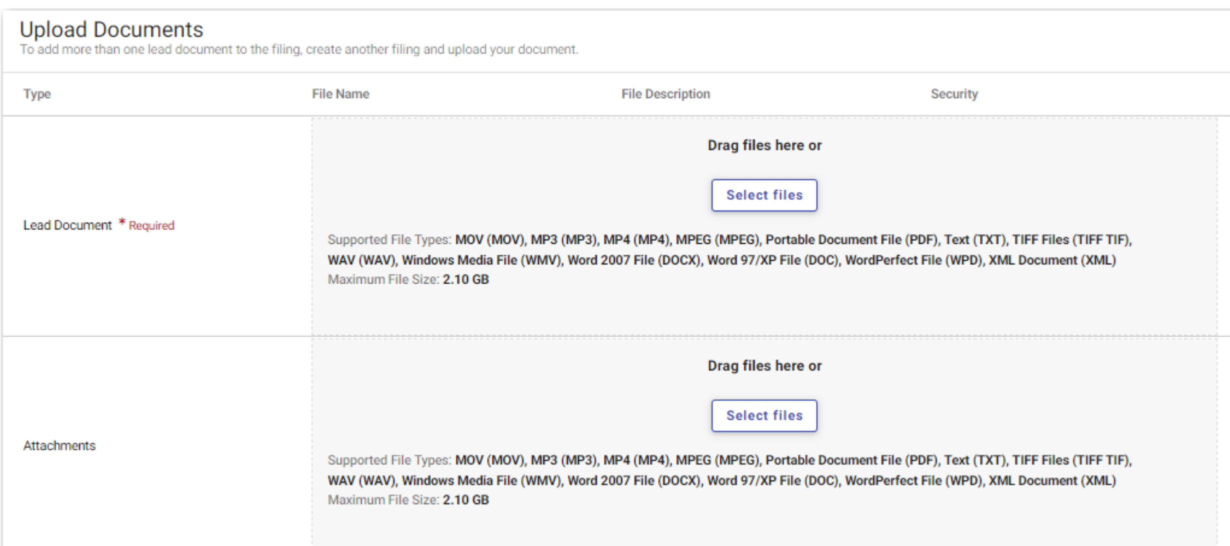
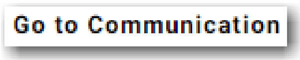


Figure 13.3 – Upload Documents Pane

16. If you have attachments to add to the filing, click 

in the **Attachments** section. Then, upload the specified attachments.

17. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
18. To add additional services, click **Additional Services**.

    The Additional Services pane is displayed.
19. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.
20. Click 

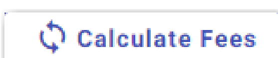
, or click **Communications** at the top of the page.

    The Communications pane is displayed.
21. Type a valid email address to specify the recipient of the courtesy or preliminary copies.
22. Click 

.
23. After you have added all of the filings, click 

.
24. On the *Service* page, add service contacts if applicable. Then, click 

.
25. 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.
26. Select the filing attorney from the **Filing Attorney** drop-down list.
27. Select the party responsible for fees from the **Party Responsible for Fees** drop-down list.

    Note: If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.
28. Select the filer type from the **Filer Type** drop-down list.
29. Click 

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

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

.

Filing into an Existing Case from the Filing History Page

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

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

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

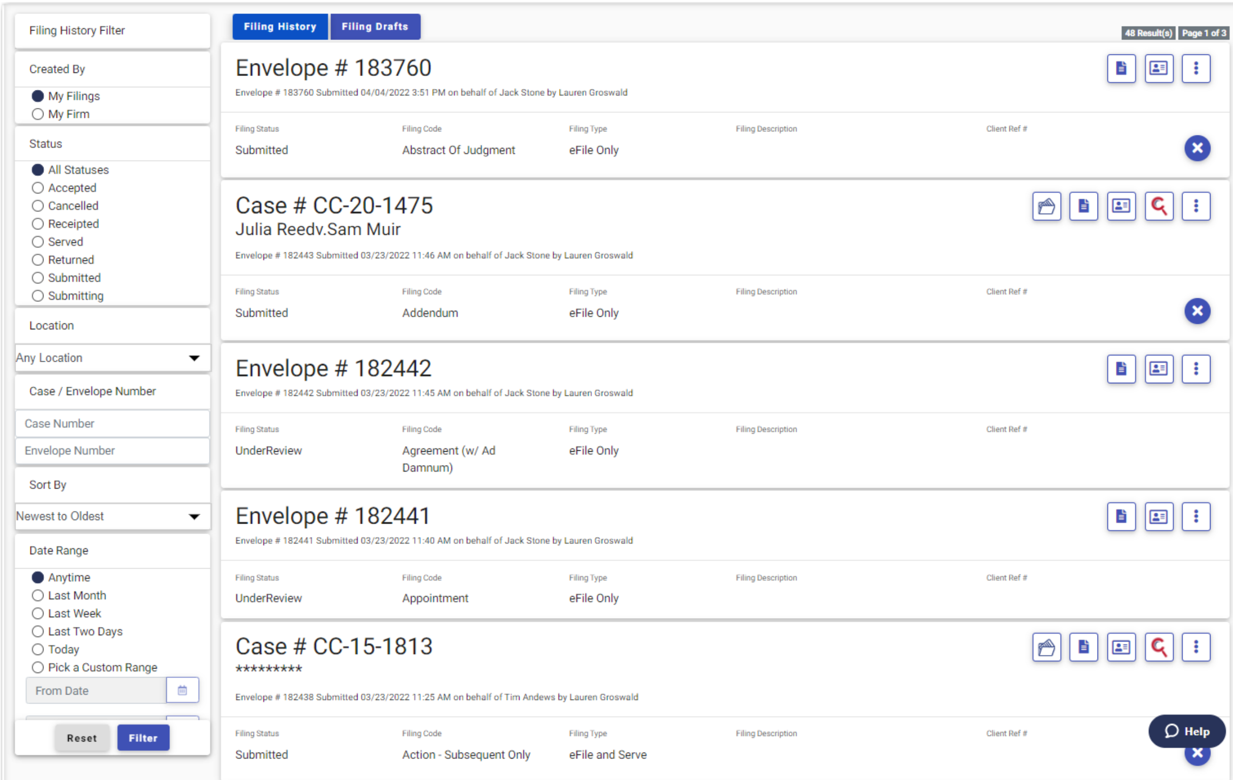


Figure 13.4 – Filing History Page

The *Case Information* page of the specified case is displayed.

2. Click **Parties →**.

   The *Parties* page is displayed.

3. Verify the party information. You can add another party to the filing if you want.

4. Click **Filings →** to continue with your filing.

   The *Filings* page is displayed.

5. On the *Filings* page, click **+ Add filing**.

   The *Edit Filing Details* page is displayed.

6. In the Filing Type pane, select the filing type option.
7. Select the filing type from the **Filing Type** drop-down list.
8. In the Filing Information pane, select the filing code from the **Filing Code** drop-down list.
9. Type a client reference number in the **Client Reference Number** field.
10. Type a description in the **Filing Description** field.
11. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.

12. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.

13. In the Upload Documents pane, click Select files. Then, select the document that you want to upload.

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

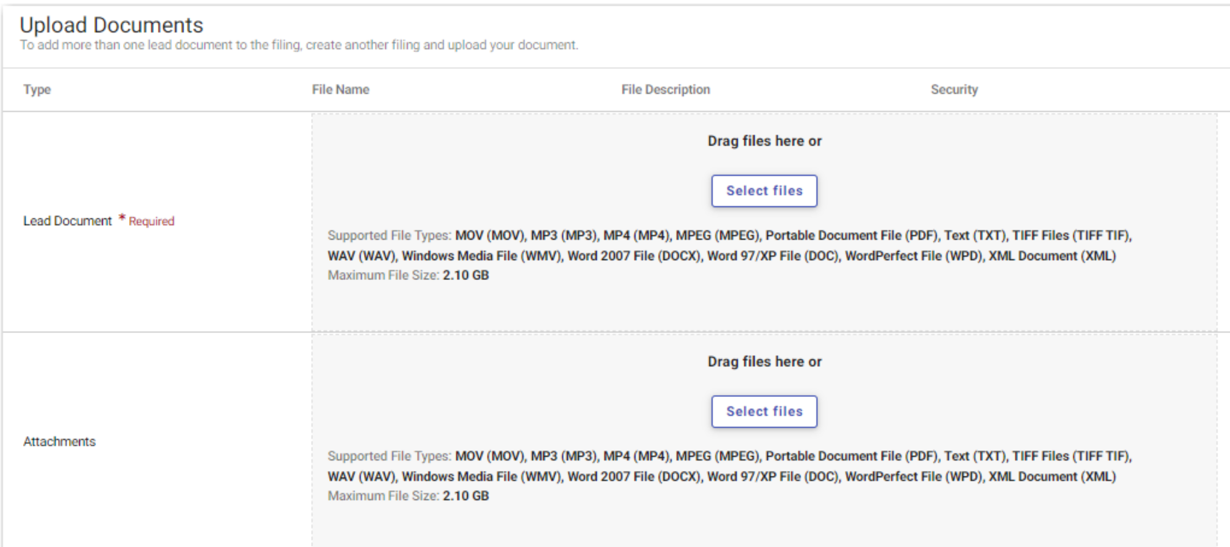


Figure 13.5 – Upload Documents Pane

14. If you have attachments to add to the filing, click Select files in the **Attachments** section. Then, upload the specified attachments.
15. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
16. To add additional services, click **Additional Services**.

    The Additional Services pane is displayed.

17. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.
18. Click Go to Communication, or click **Communications** at the top of the page.

    The Communications pane is displayed.

19. Type a valid email address to specify the recipient of the courtesy or preliminary copies.
20. Click Save.
21. After you have added all of the filings, click Service →.
22. On the *Service* page, add service contacts, if applicable. Then, click Fees →.

23. 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.
24. Select the filing attorney from the **Filing Attorney** drop-down list.
25. Select the party responsible for fees from the **Party Responsible for Fees** drop-down list.

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

26. Select the filer type from the **Filer Type** drop-down list.
27. Click **Calculate Fees** if you want to view the fee total.
28. Click **Summary →**.
29. Review the summary. If applicable, select the **Submission Agreements** check box.
30. When you are satisfied with your filing, click **Submit**.

Filing into a Non-Indexed Case

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

To file into a non-indexed case:

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

   The *File into Existing Case* window is displayed.

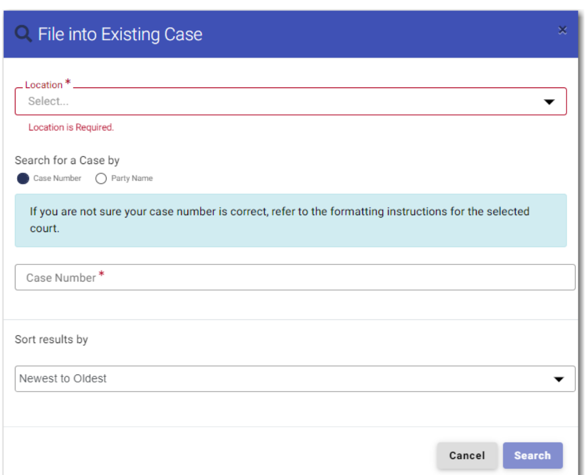


Figure 13.6 – Example of a File into Existing Case Window

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

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

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

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

4. Click 

 or press ENTER.

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

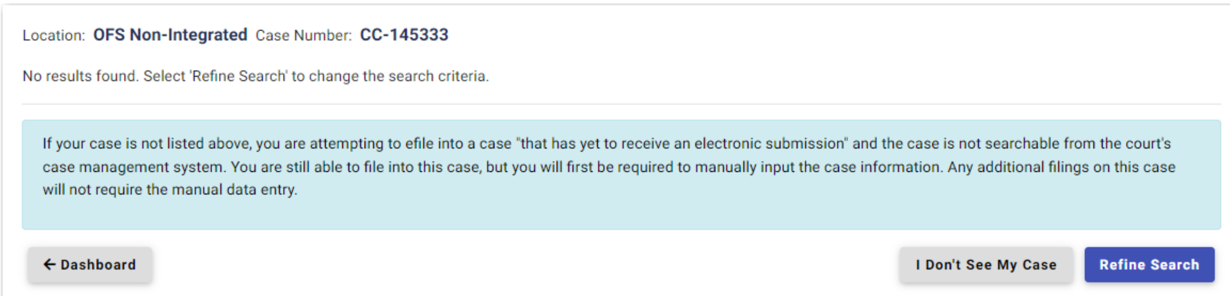
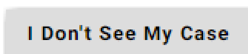


Figure 13.7 – Case Search Window with No Results Found

5. To continue, click 

.

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

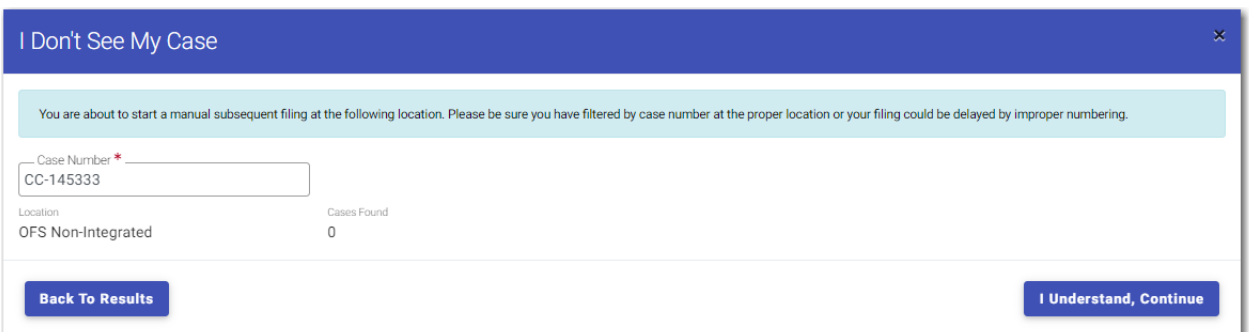


Figure 13.8 – I Don't See My Case Window

6. Click 

 to continue filing into the case.

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

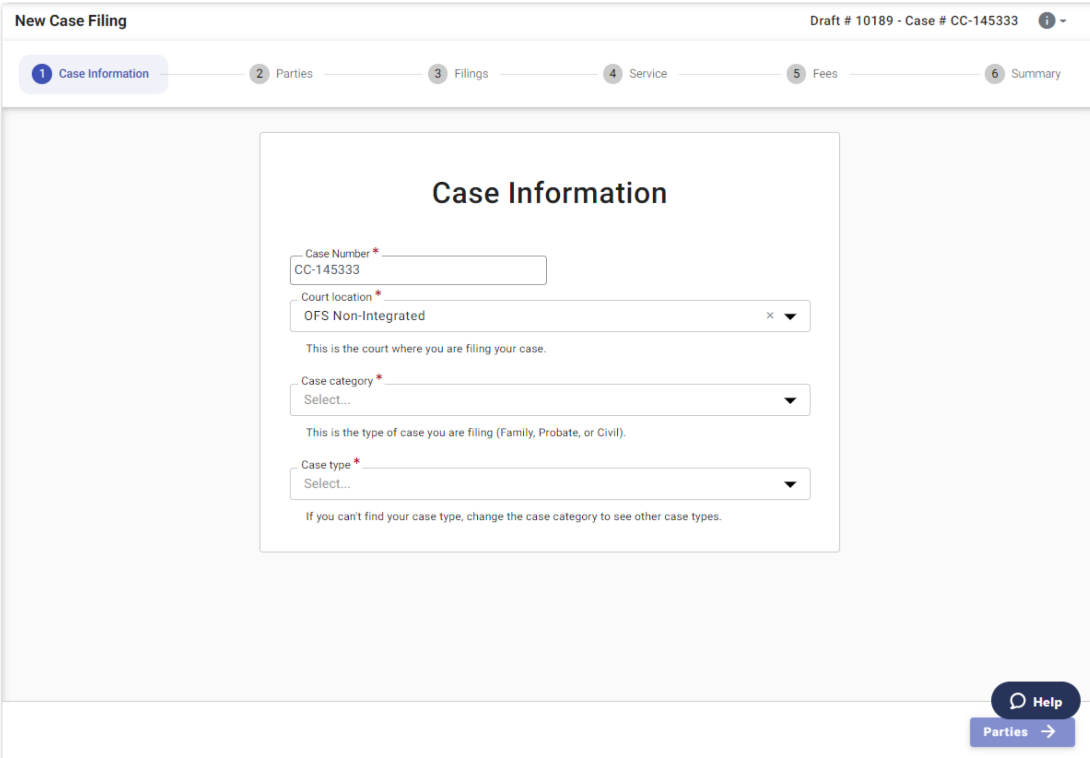


Figure 13.9 – Case Information Page

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

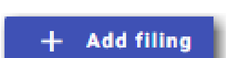
11. Continue entering case information on the following pages until you reach the *Summary* page.
12. Review your filing. When you are satisfied with the information you have entered, click .

Creating a Service Only Filing

To create a Service Only filing:

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

   Note: The *Case Information* page and the *Parties* page are already populated since this is an existing case.

3. On the *Filings* page, click .

The *Edit Filing Details* page is displayed.

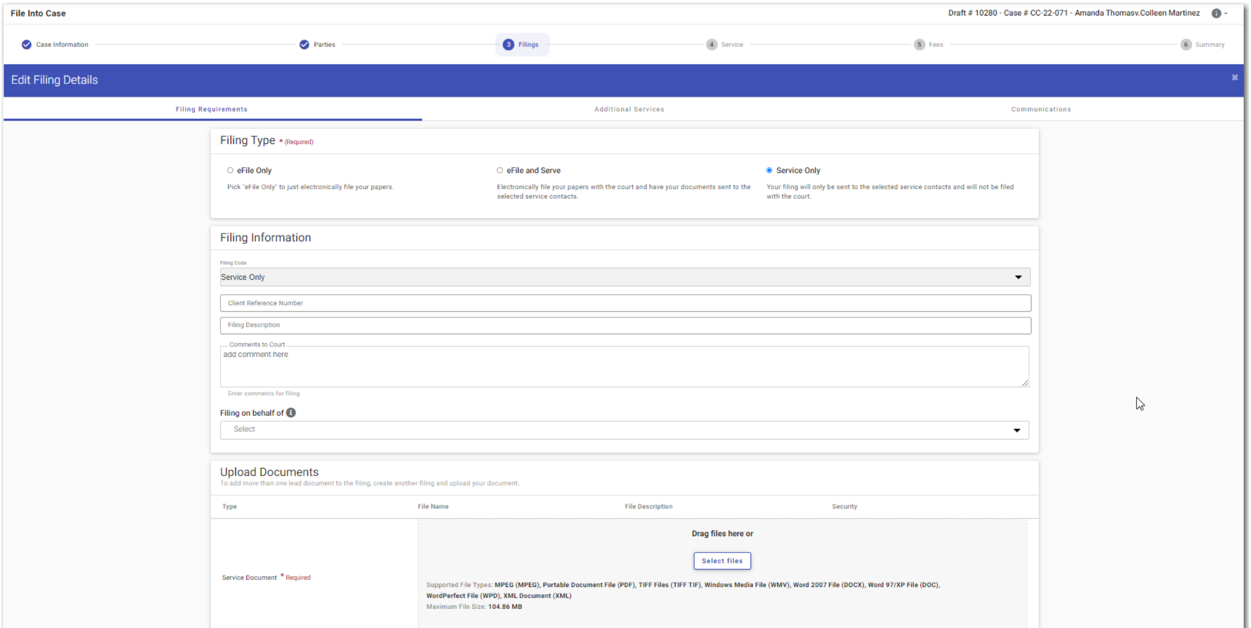


Figure 13.10 – Example of the Edit Filing Details Page—Service Only Filing

4. In the Filing Type pane, select **Service Only**.
5. In the Filing Information pane, enter information, if applicable.

   Note: The Service Only filing code is selected by default.

6. In the Upload Documents pane, click 

. Then, select the document that you want to upload.

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

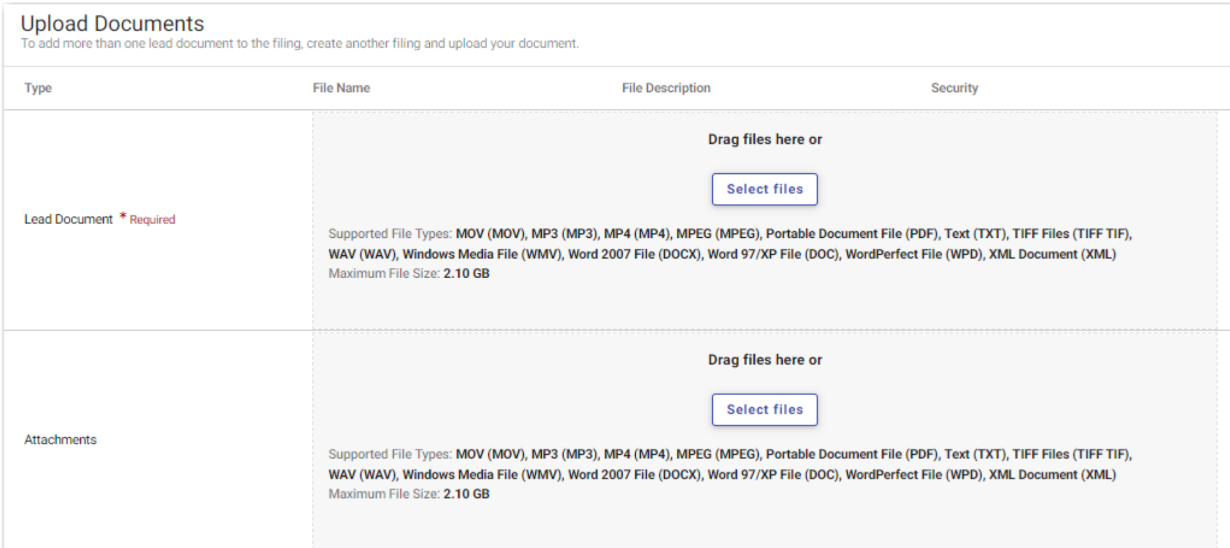
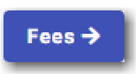


Figure 13.11 – Upload Documents Pane

7. If you have attachments to add to the filing, click 

 in the **Attachments** section. Then, upload the specified attachments.
8. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
9. Click 

 to save your entries and to continue.
10. On the *Service* page, add the service contacts that you want to receive a Service Only filing.
11. Click 

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

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

.

14 Access re:Search®

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

Note: The ability to access re:Search from File & Serve 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 File & Serve.

A case that is available in re:Search is indicated by an icon (). Click  to access a specified case in re:Search. 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 File & Serve:

- *Filing History* page

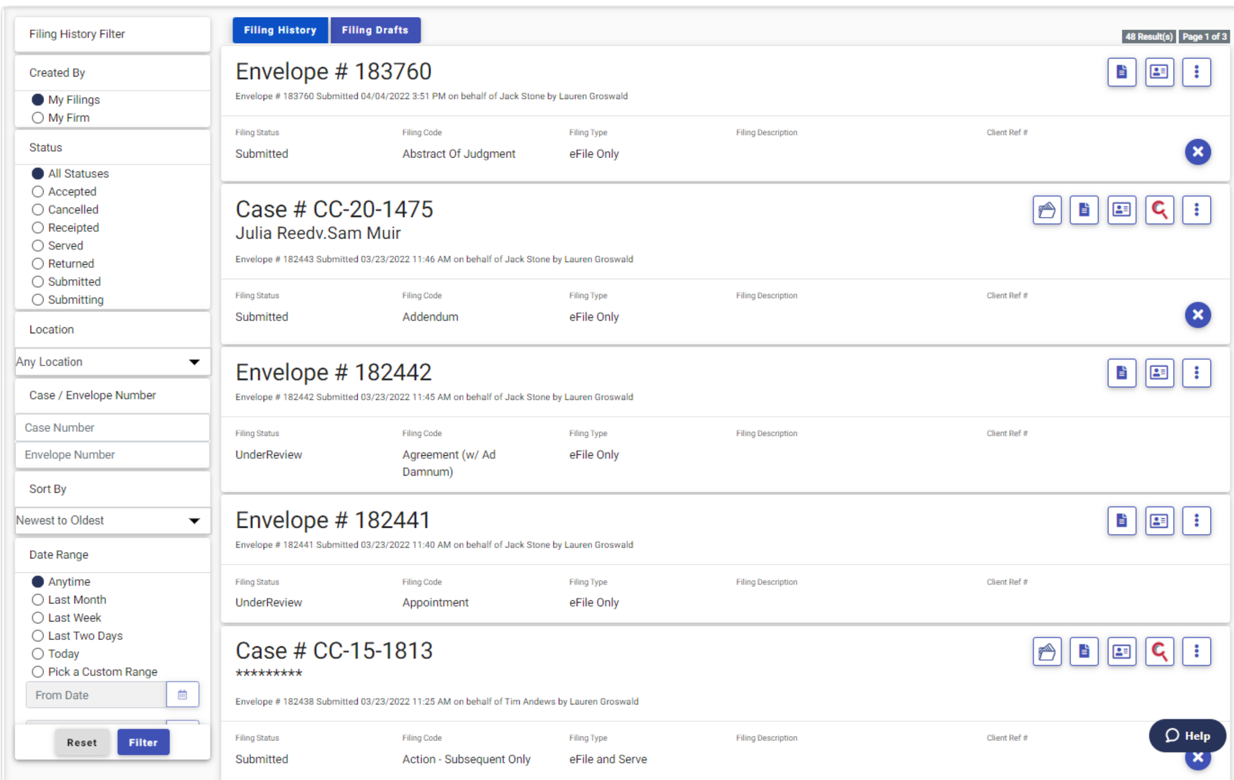


Figure 14.1 – re:Search Icon on the Filing History Page

- *Filing Drafts* page

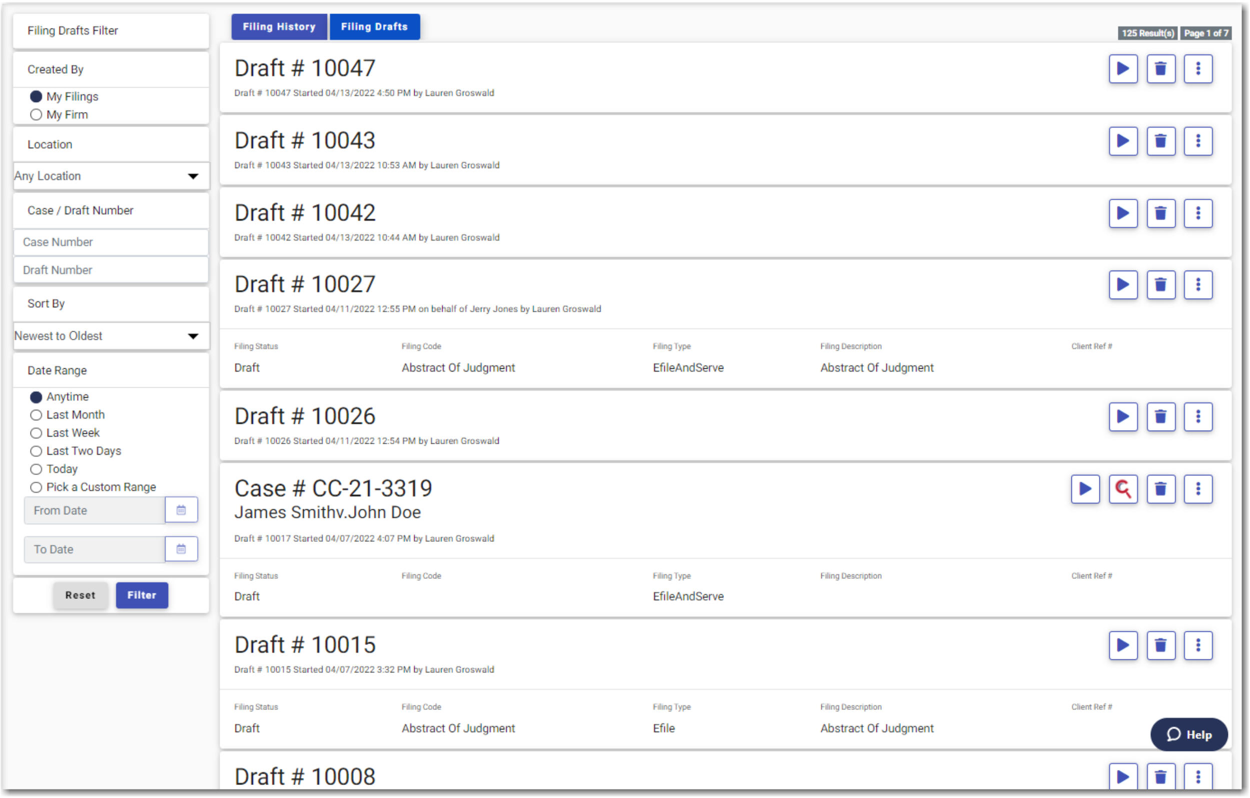


Figure 14.2 – re:Search Icon on the Filing Drafts Page

- *Case Search* page

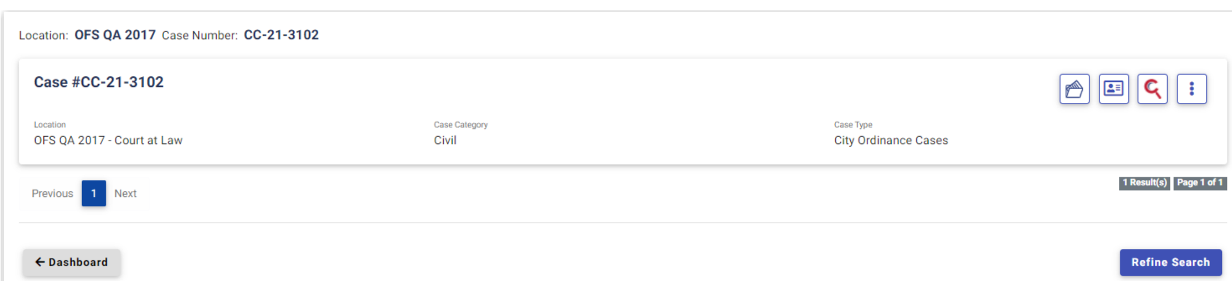


Figure 14.3 – re:Search Icon on the Case Search Page

- *Bookmarks* page

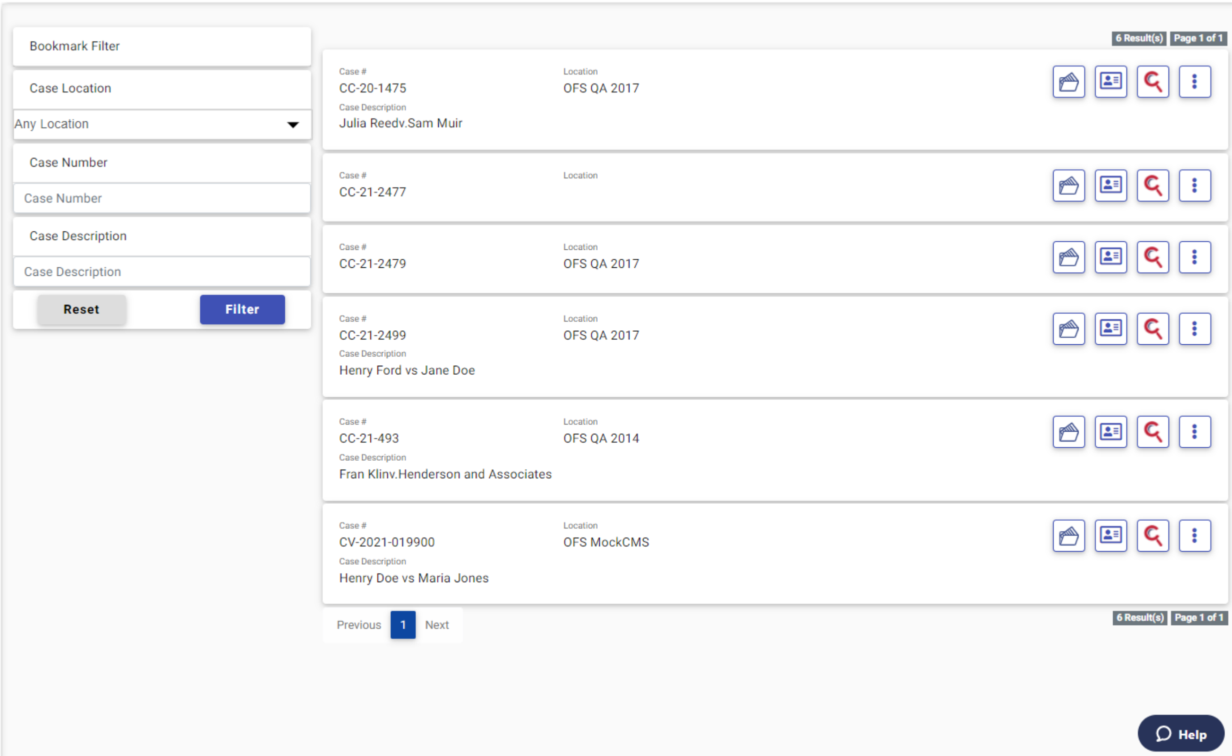


Figure 14.4 – re:Search Icon on the Bookmarks Page

15 Service Contacts

Topics covered in this chapter

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:

- *Filing History* page

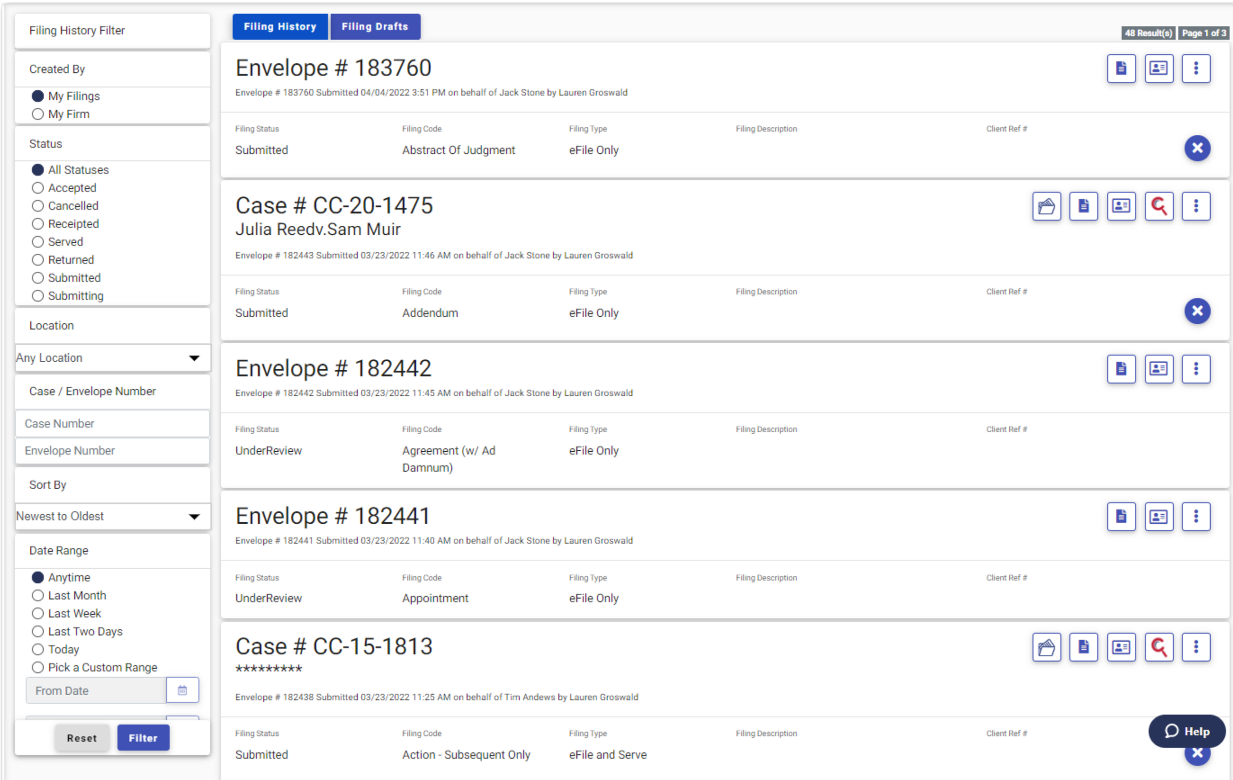


Figure 15.1 – Example of a Filing History Page

- *Case Search* page

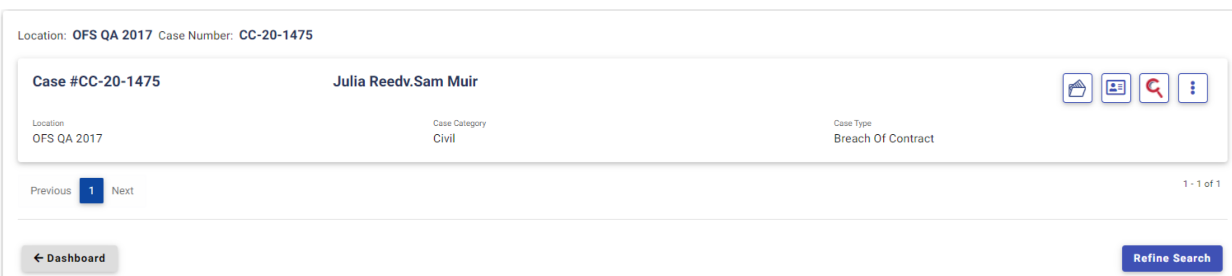


Figure 15.2 – Example of a Case Search Page

- *Bookmarks* page

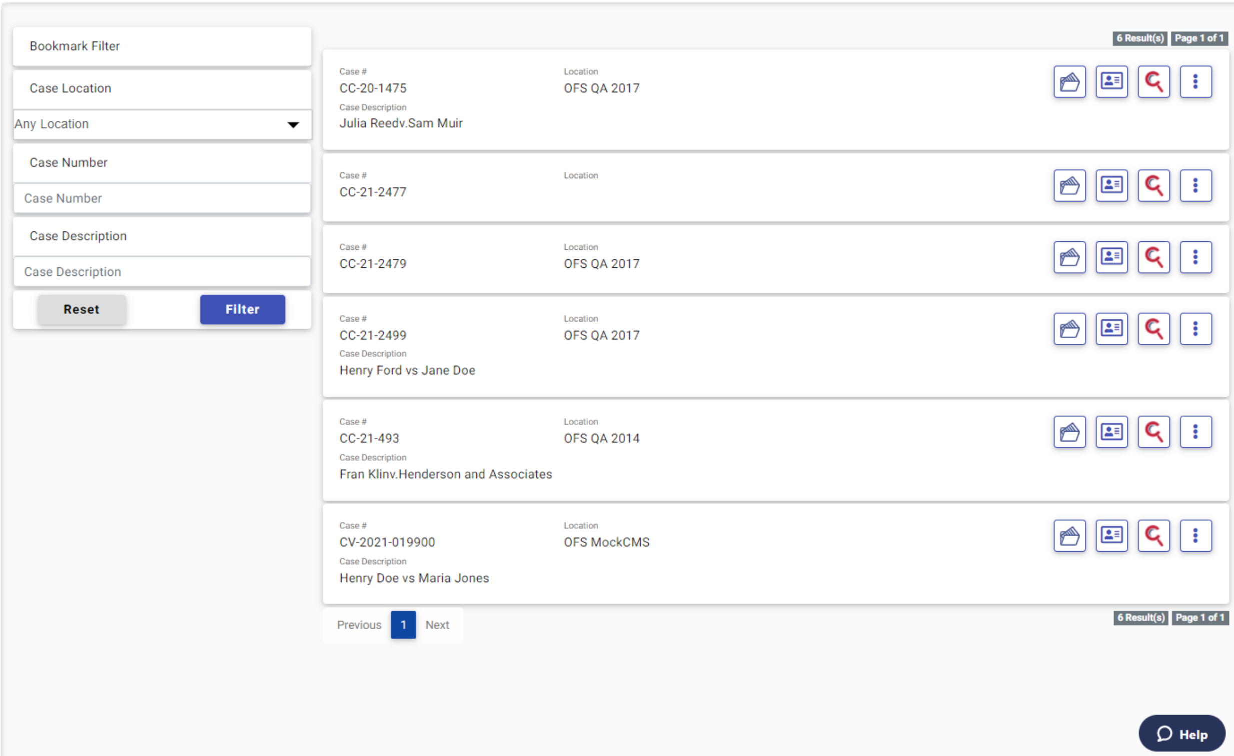


Figure 15.3 – Example of a Bookmarks Page

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.

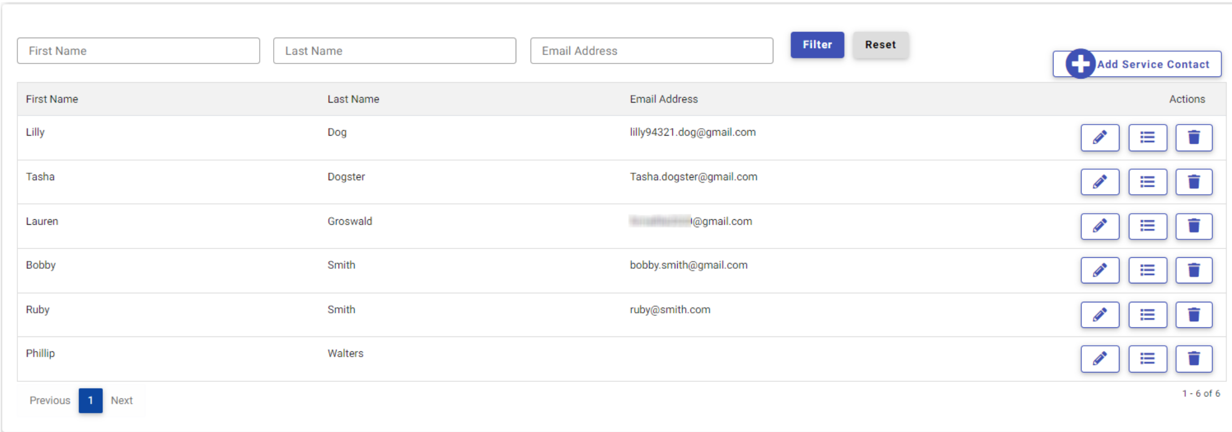
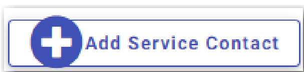


Figure 15.4 – Service Contacts Page

2. Click 

.

   Additional fields are displayed.

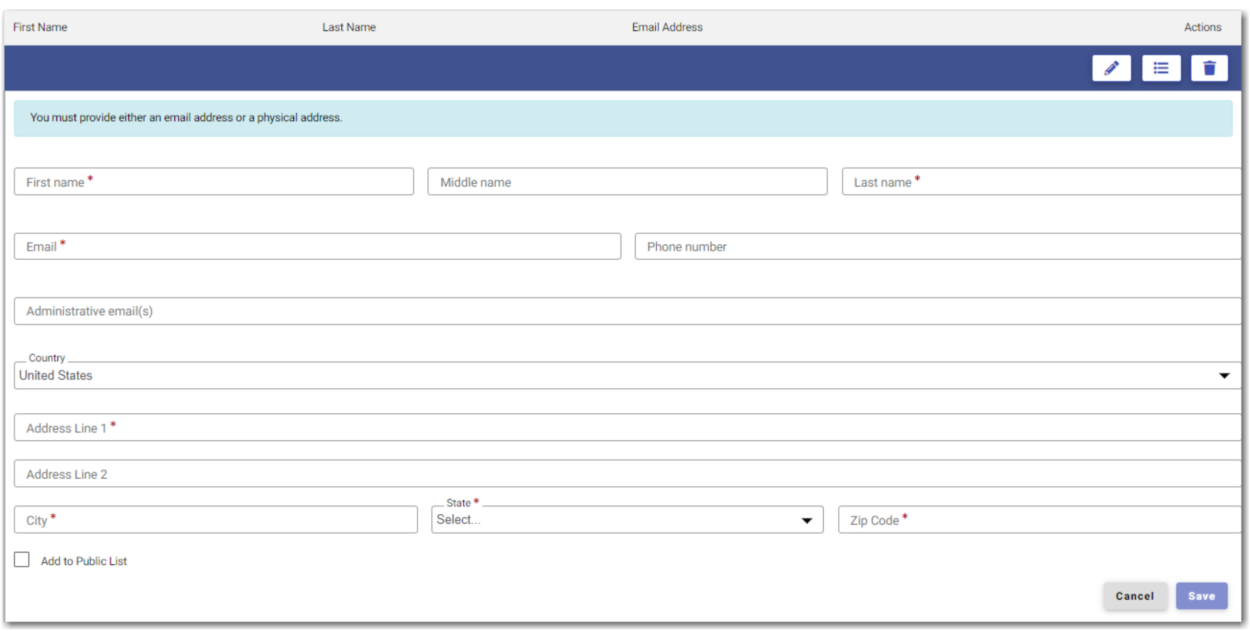


Figure 15.5 – Service Contacts—Additional Fields

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 applicable, type the administrative email address in the **Administrative email(s)** 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. Select the **Add to Public List** check box if you want to add the new service contact to the public list.

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

14. 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 Yourself as a Service Contact to a Filing

You can add yourself as a service contact on a case filing to ensure that you will receive updates regarding the filing.

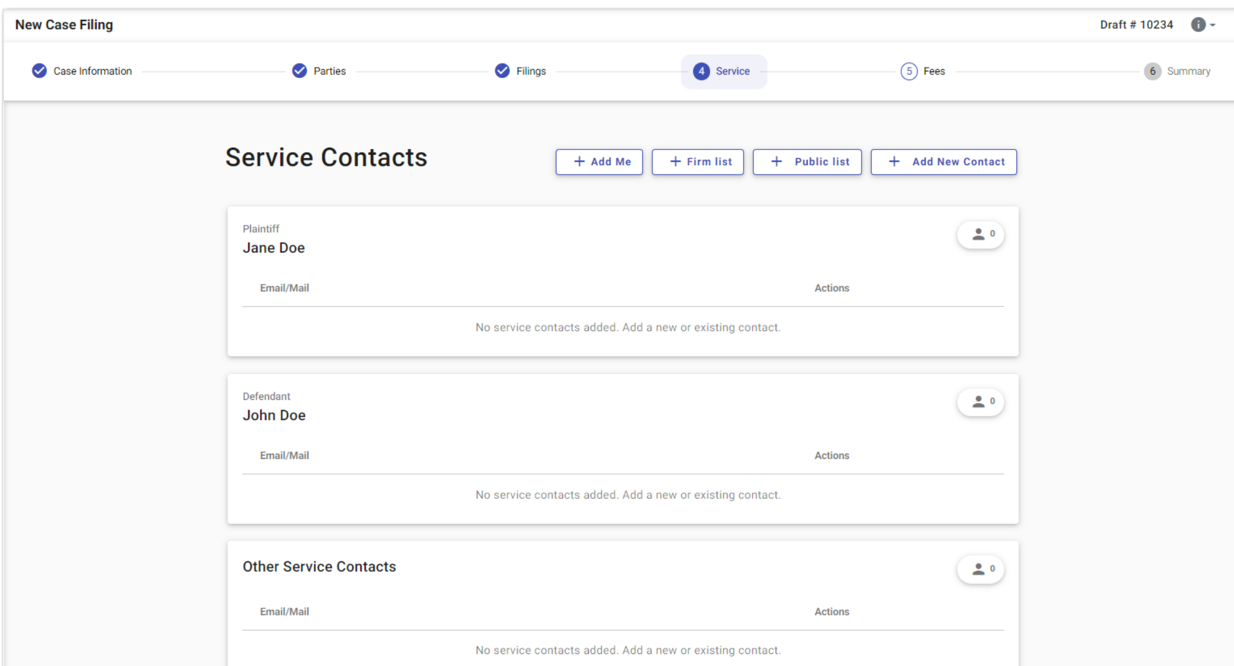


Figure 15.6 – Example of a Service Page in a Case Filing

To add yourself as a service contact on a case filing:

1. On the *Service* page, click **+ Add Me**.

   The *Add Me As Service Contact* page is displayed.

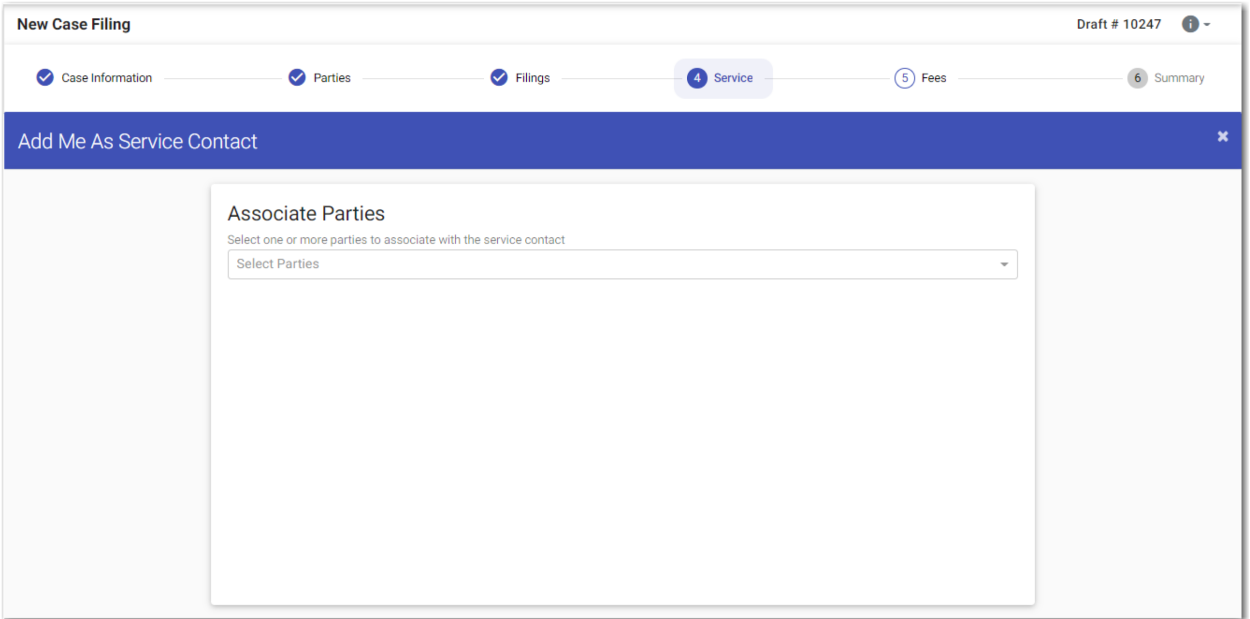


Figure 15.7 – Example of an Add Me As Service Contact Page

2. In the Associate Parties pane, select the party that you want to associate with the service contact.

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

3. Click 

.

Adding a Service Contact from Your Firm's Service Contact List to a Filing

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

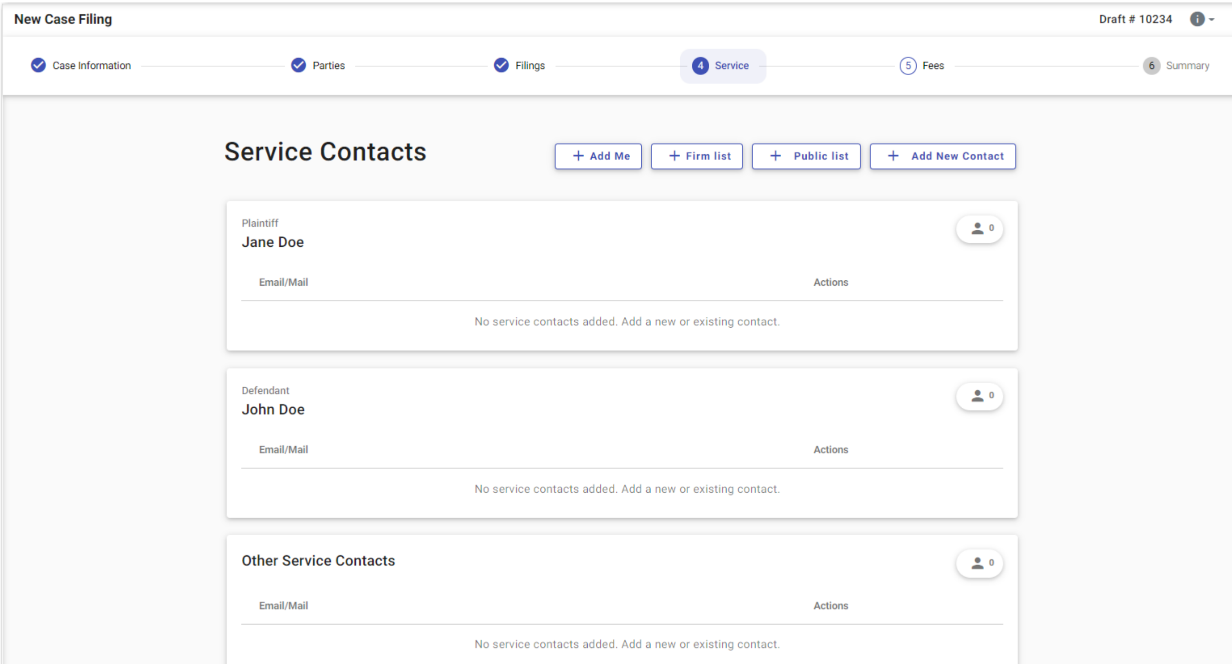


Figure 15.8 – Example of a Service Page in a Case Filing

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

1. On the *Service* page, click 

.

   The *Add Existing Firm Contact* page is displayed.

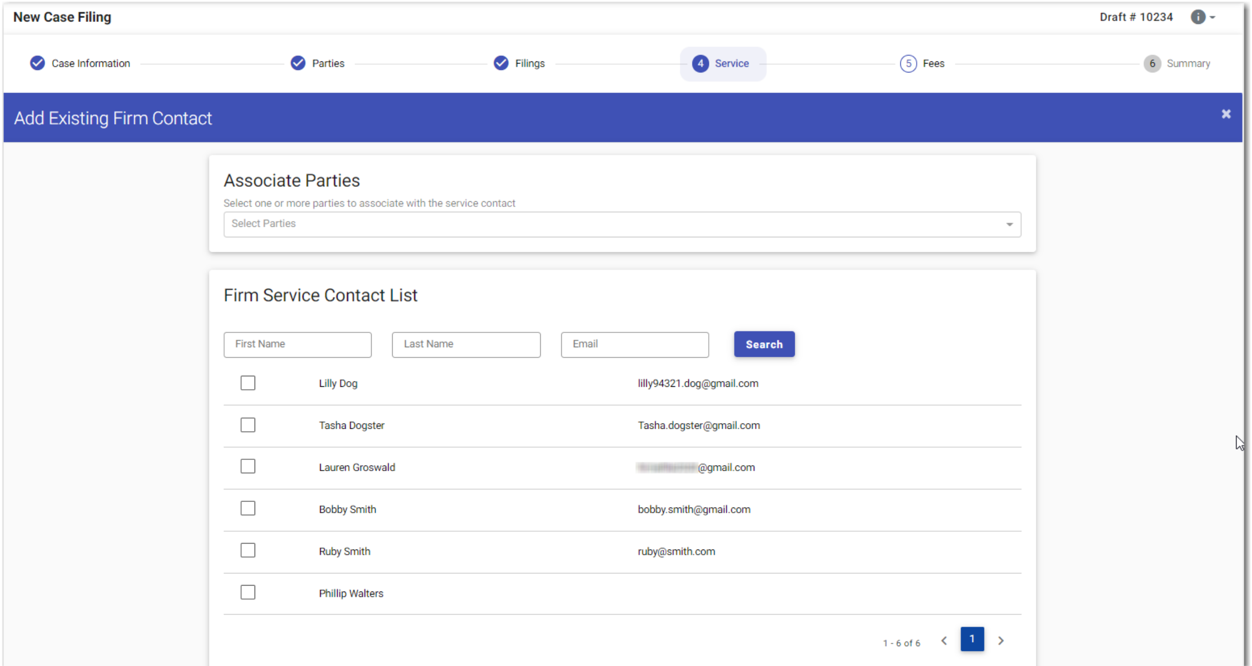


Figure 15.9 – Example of an Add Existing Firm Contact Page

2. In the Associate Parties pane, select the party that you want to associate with the selected service contacts.

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

3. In the Firm Service Contact List pane, select the check box for each contact that you want to add to the filing.

4. Click 

.

Adding a Service Contact from a Public List to a Filing

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

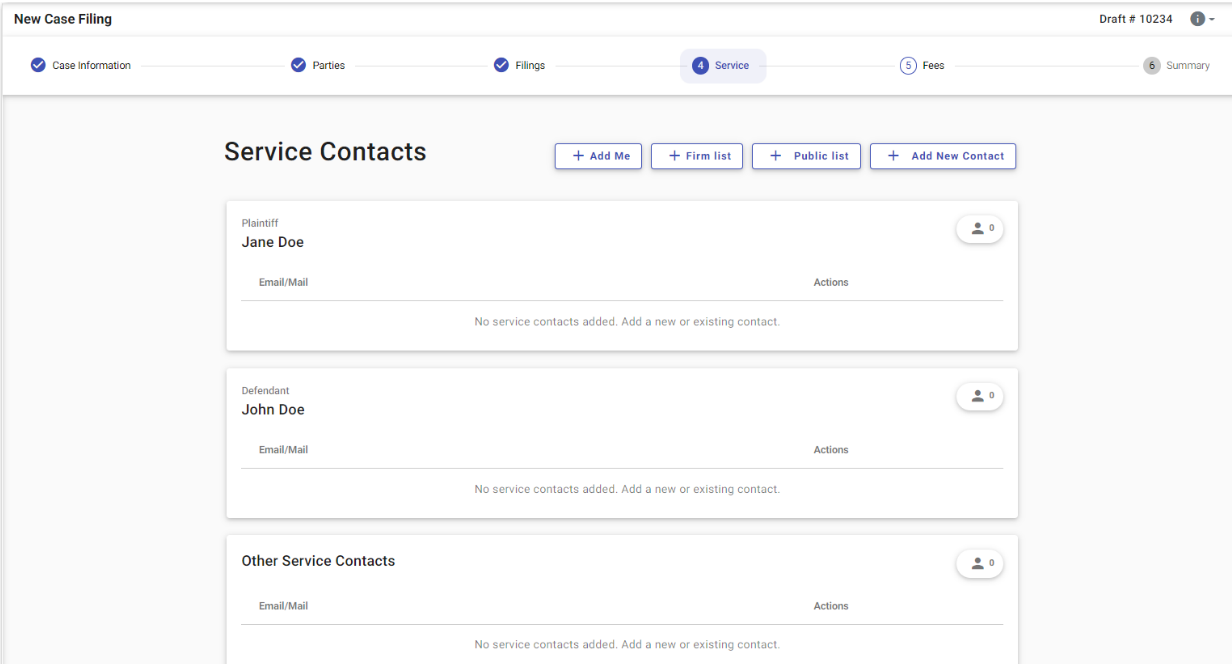


Figure 15.10 – Example of a Service Page in a Case Filing

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

1. On the *Service* page, click 

.

   The *Add Existing Public Contact* page is displayed.

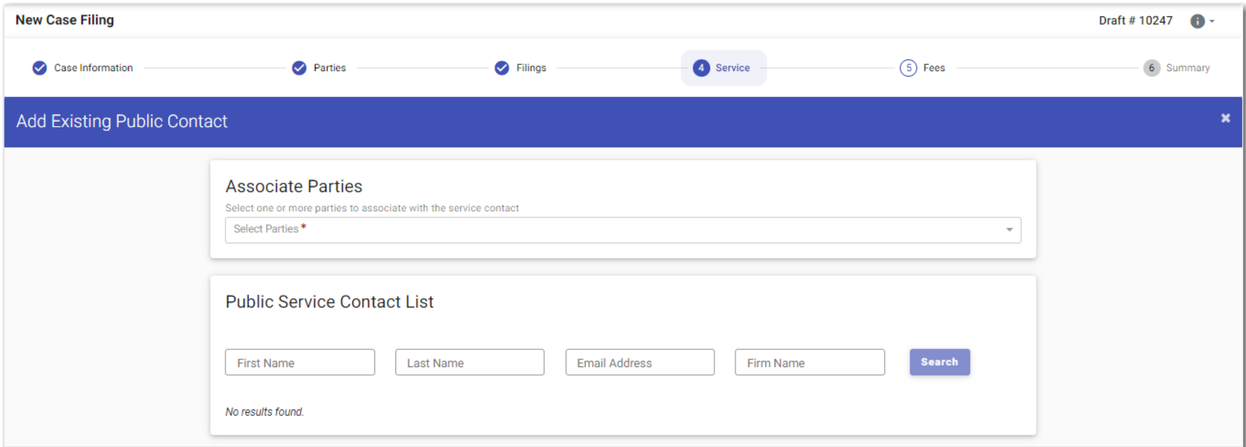


Figure 15.11 – Example of an Add Existing Public Contact Page

2. In the Associate Parties pane, select the party that you want to associate with the selected service contacts.

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

3. In the Public Service Contact List pane, type at least one letter in a field, and then click **Search**.

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

4. Locate the contacts that you want to add to your filing.
5. Select the check box for each contact that you want to add.
6. Click **Save**.

Adding a New Service Contact to a Filing

You can add a new service contact to a filing.

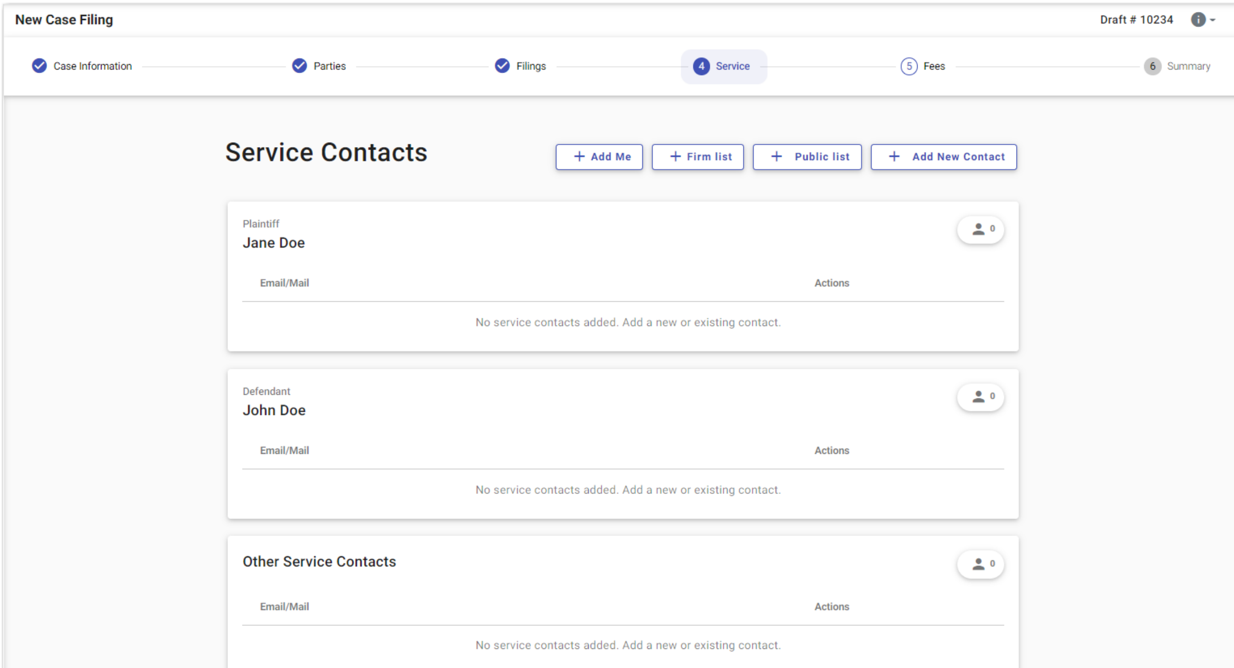


Figure 15.12 – Example of a Service Page in a Case Filing

To add a new service contact to a filing:

1. On the *Service* page, click 

.

   The *Add Service Contact* page is displayed.

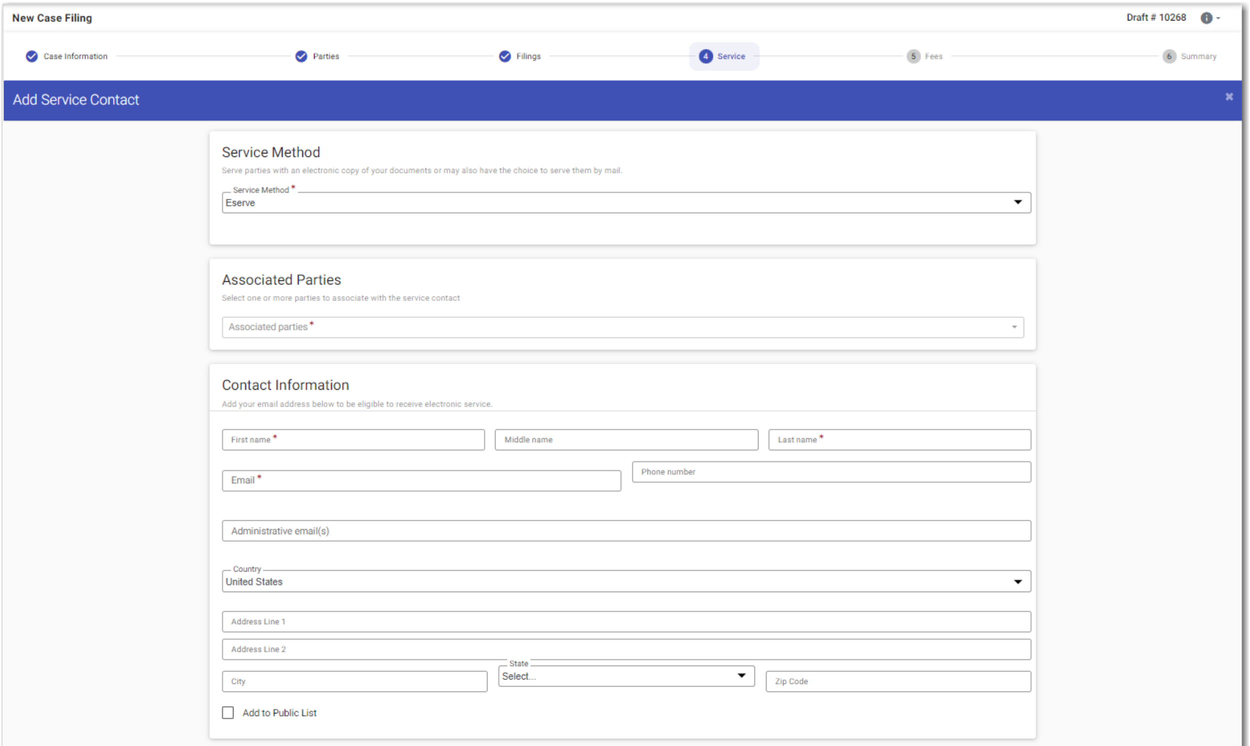


Figure 15.13 – Example of an Add Service Contact Page

2. In the Service Method pane, from the **Service Method** drop-down list, select the service method to use for each service contact.

   Note: If you selected the eFile Only option for the filing type, the Service Method pane is not displayed on the *Add Service Contact* page.

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

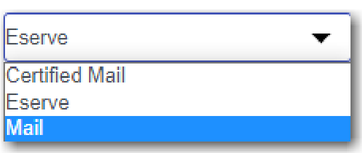


Figure 15.14 – Example of a Service Method Drop-Down List

3. In the Associate Parties pane, select the party that you want to associate with the new service contact.

   Note: If the service contact you are adding is not associated with any party on the case, select “Other: No party association” from the Associate Parties drop-down list.

4. In the Contact Information pane, 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 applicable, type the administrative email address in the **Administrative email(s)** field.

8. 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**.
9. If a physical address is required for the service contact, type the address in the **Address Line 1** field.
10. If applicable, type an address in the **Address Line 2** field.
11. Type the name of the city in the **City** field.
12. Select the state from the **State** drop-down list.
13. Type the ZIP code in the **Zip Code** field.
14. Select the **Add to Public List** check box if you want to add the new service contact to the public list.

   Note: If you add the service contact to the public list, other filers will have access to that contact for their filings.
15. After you have entered the required information, click 

.

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.

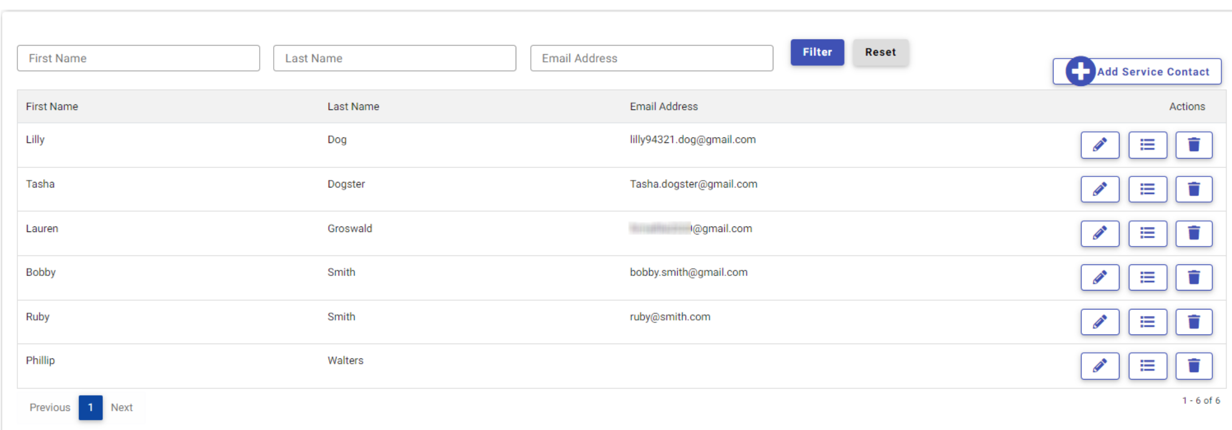


Figure 15.15 – Service Contacts Page

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

   The additional fields for the specified service contact are displayed with the information that you previously entered.
3. Update the information, as applicable.
4. When you are done with your updates, click 

.

Viewing a List of Cases Attached to a Service Contact

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 a list of cases that are attached to a service contact:

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

   The *Service Contacts* page is displayed.

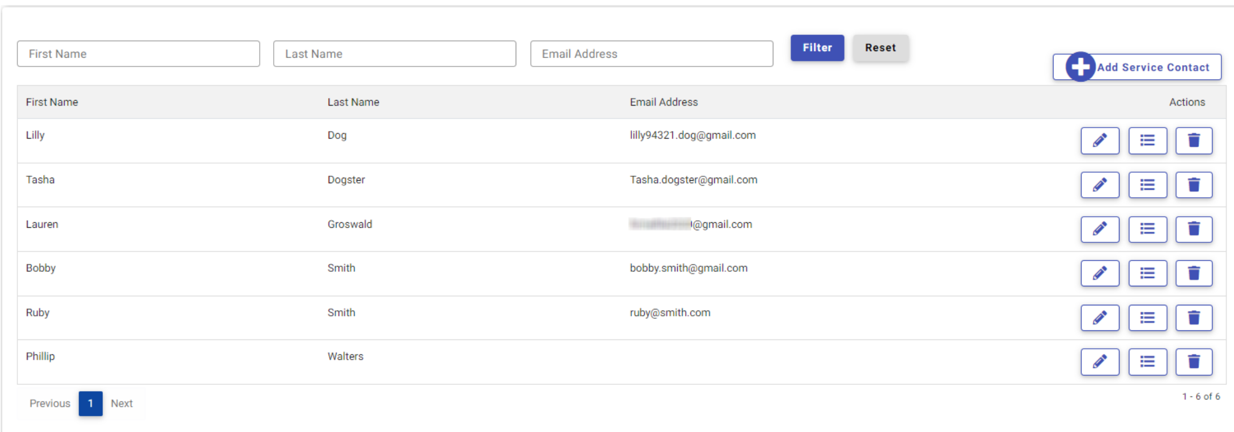


Figure 15.16 – Service Contacts Page

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

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

Figure 15.17 – Service Contact Attached Cases Window

3. Click 

to download the case list to a Microsoft Excel file.

   The attached cases are listed on the Excel spreadsheet.

   Note: If there are no cases attached to the service contact, the following window is displayed.

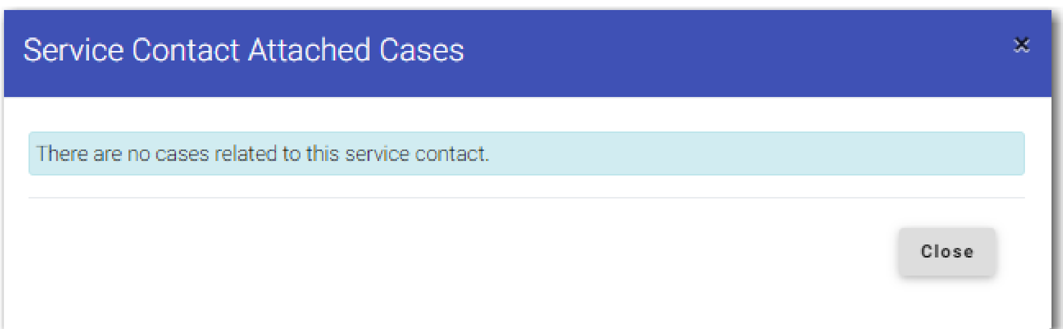


Figure 15.18 – Service Contact Attached Cases Window—No Attached Cases

Viewing Service Contact History for a Case

You can view the service contact history for a case 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.

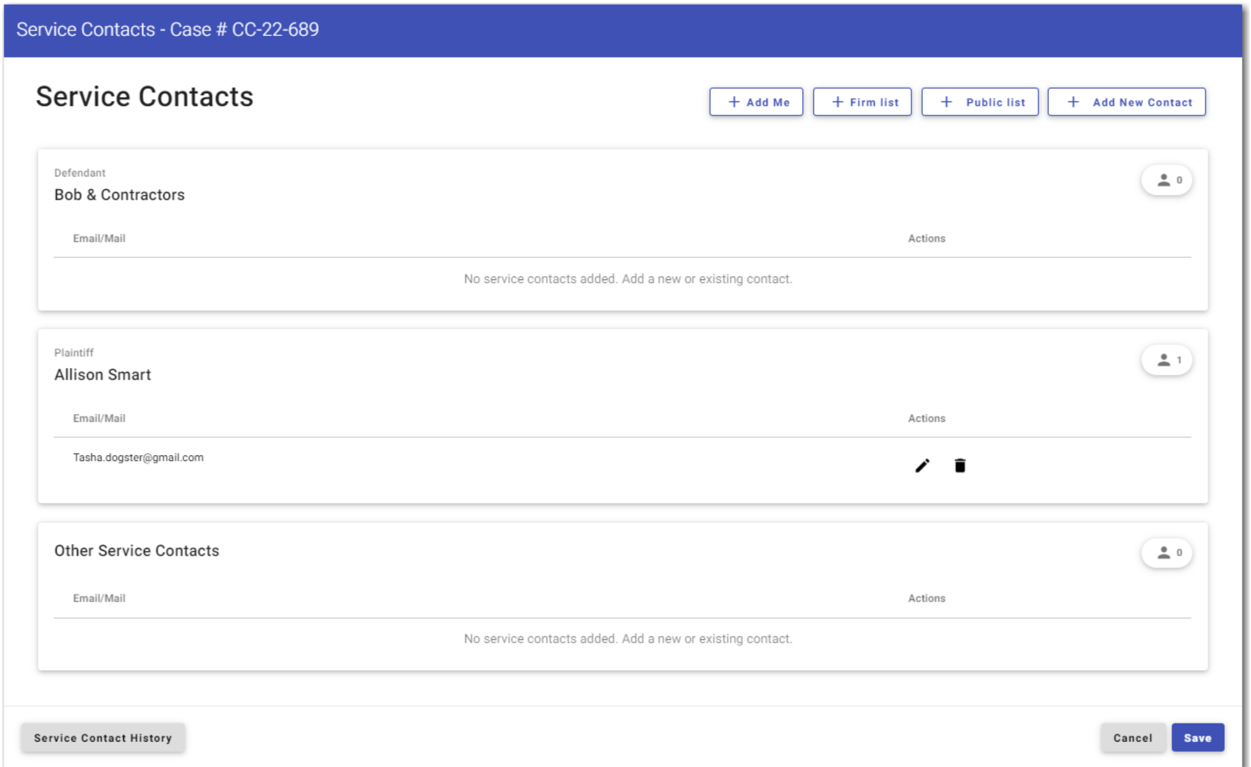


Figure 15.19 – Example of a Case Service Contacts Window

3. Click .

   The *Service Contact History* window is displayed.

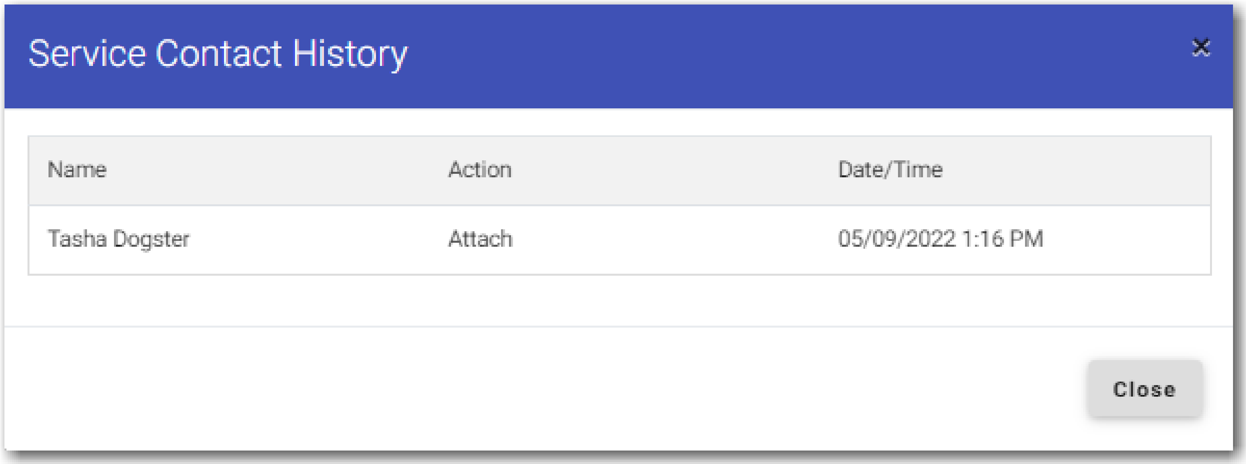


Figure 15.20 – Example of a Service Contact History Window

Updating Information for a Service Contact Attached to a Case

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

To update the information for a service contact attached to a case:

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

   The *Filing History* page is displayed.

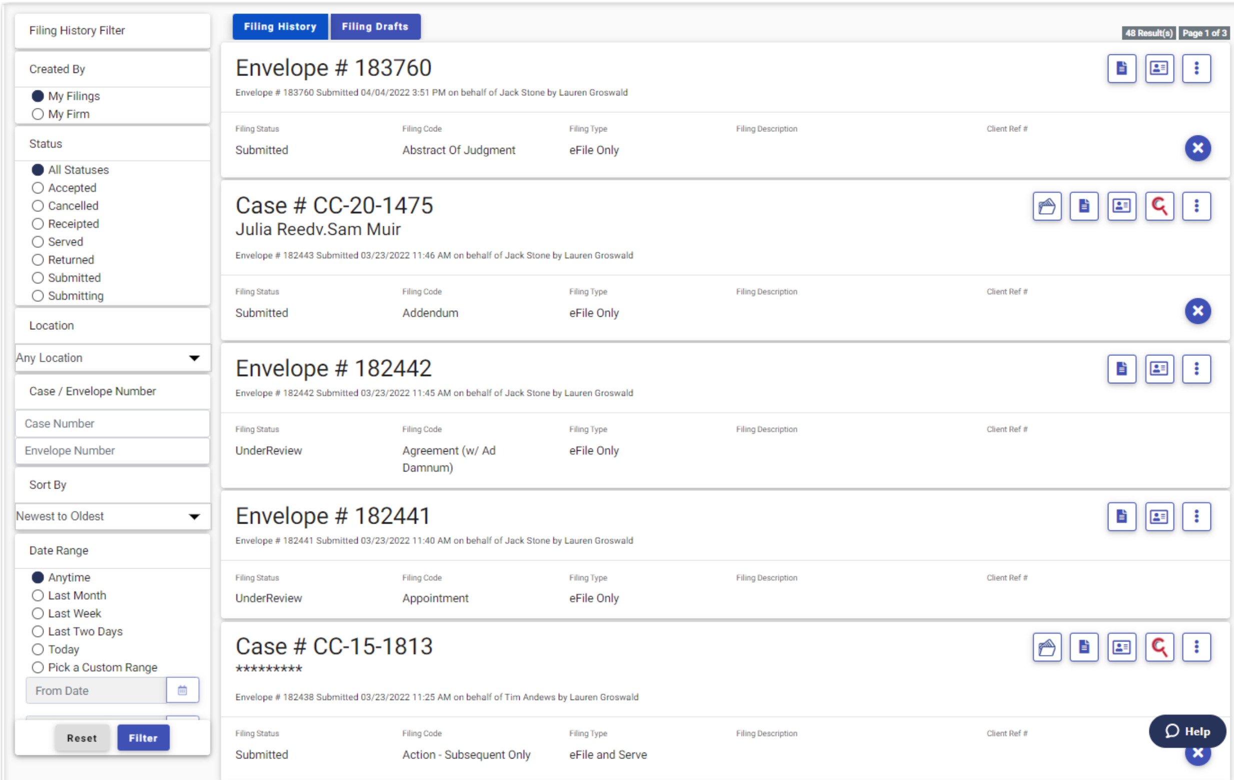


Figure 15.21 – Filing History Page

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

   The service contacts for the case are displayed.

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

   The *Update Service Contact* window is displayed.

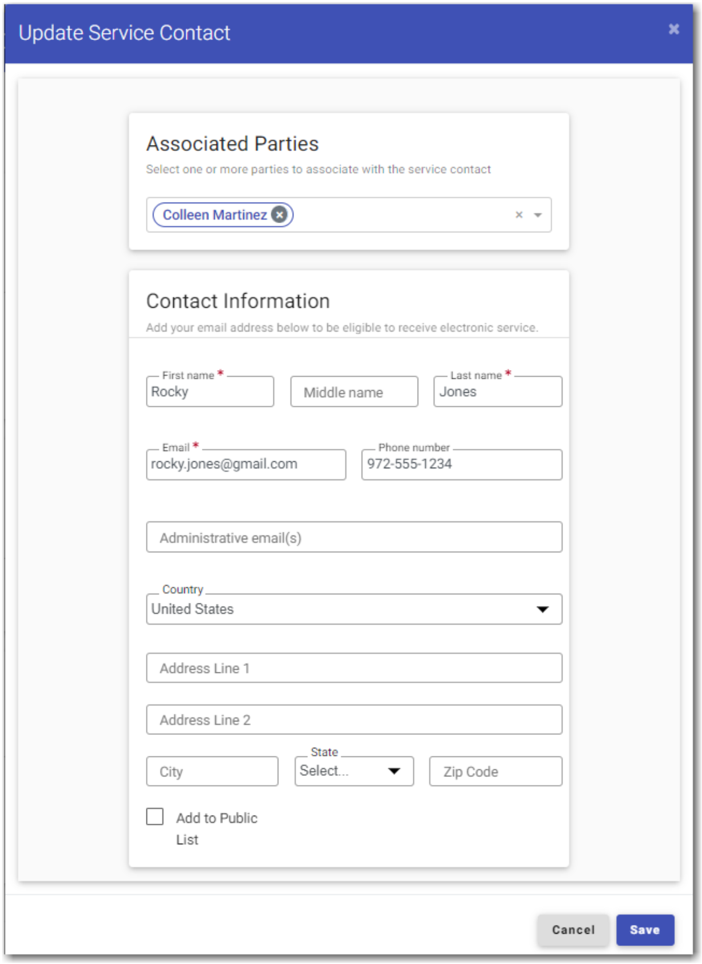


Figure 15.22 – Update Service Contact Window

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

.

Deleting a Service Contact

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

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

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

   The *Service Contacts* page is displayed.

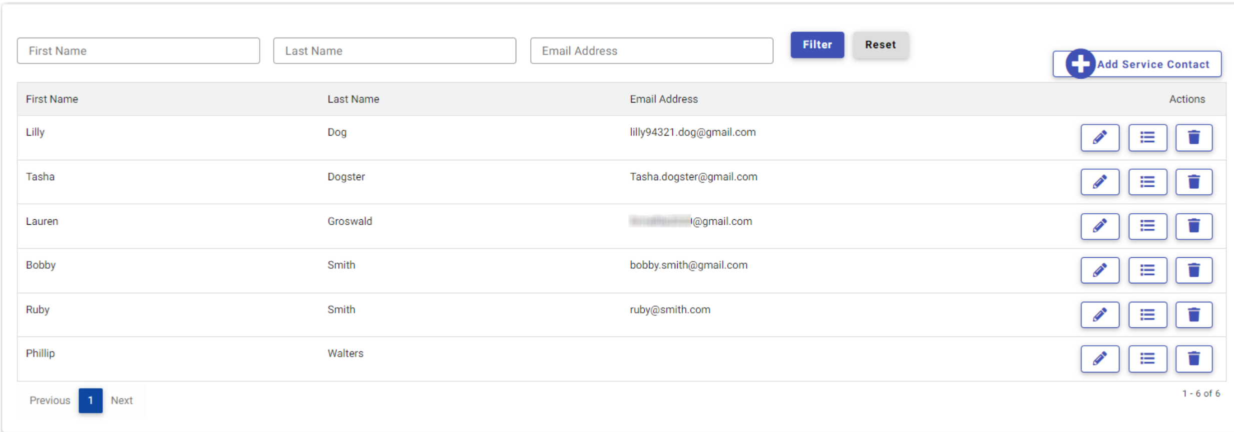
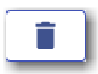


Figure 15.23 – Service Contacts Page

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.

16 Templates

Topics covered in this chapter

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

Adding a Template

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

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

   The *Templates* page is displayed.

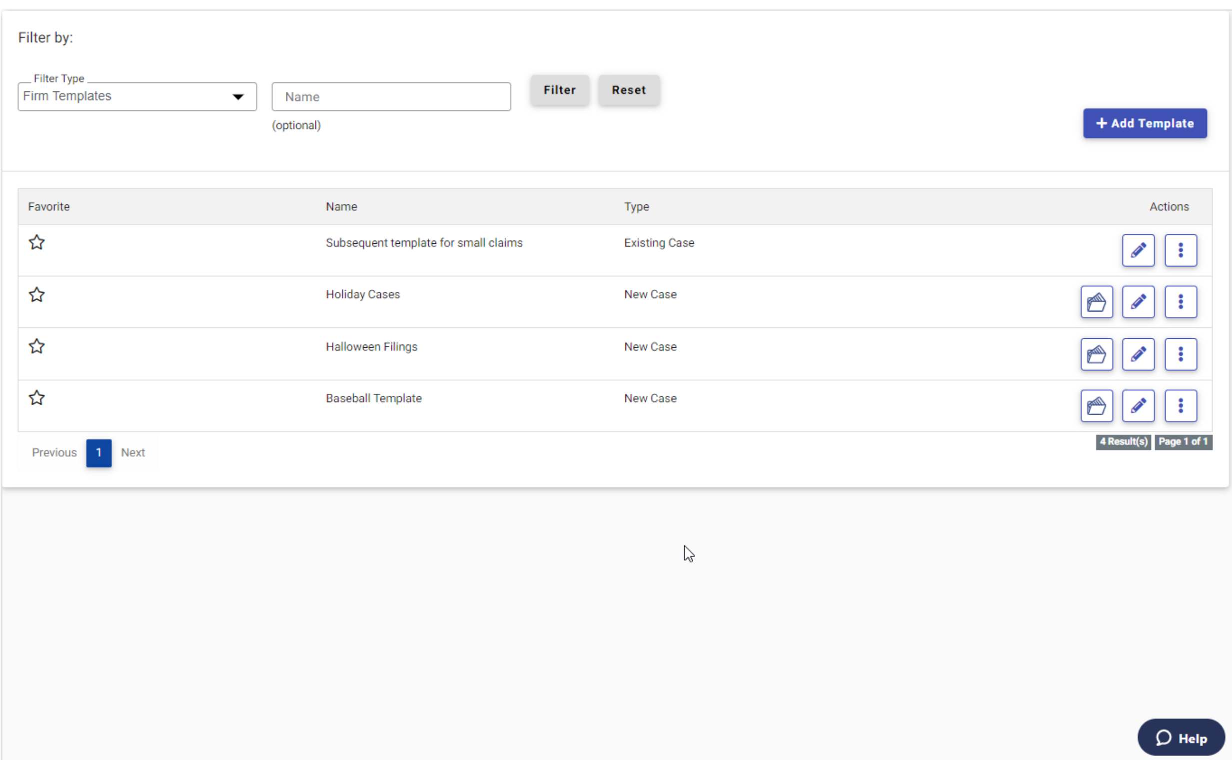


Figure 16.1 – Templates Page

2. Click 

.

A pane is displayed.

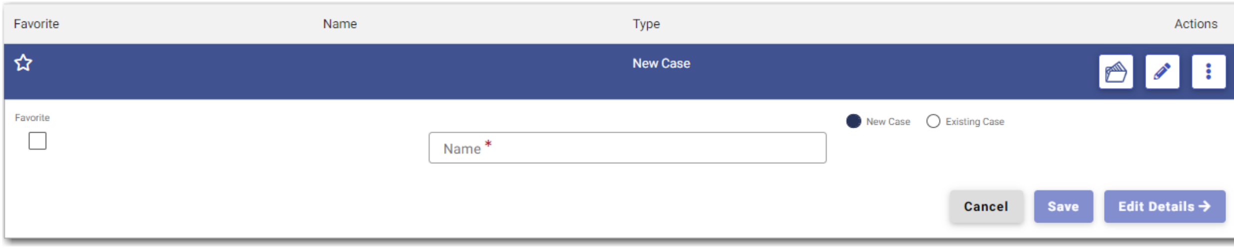


Figure 16.2 – Templates Pane

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

.

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

Editing a Template

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

To edit an existing template:

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

   The *Templates* page is displayed.

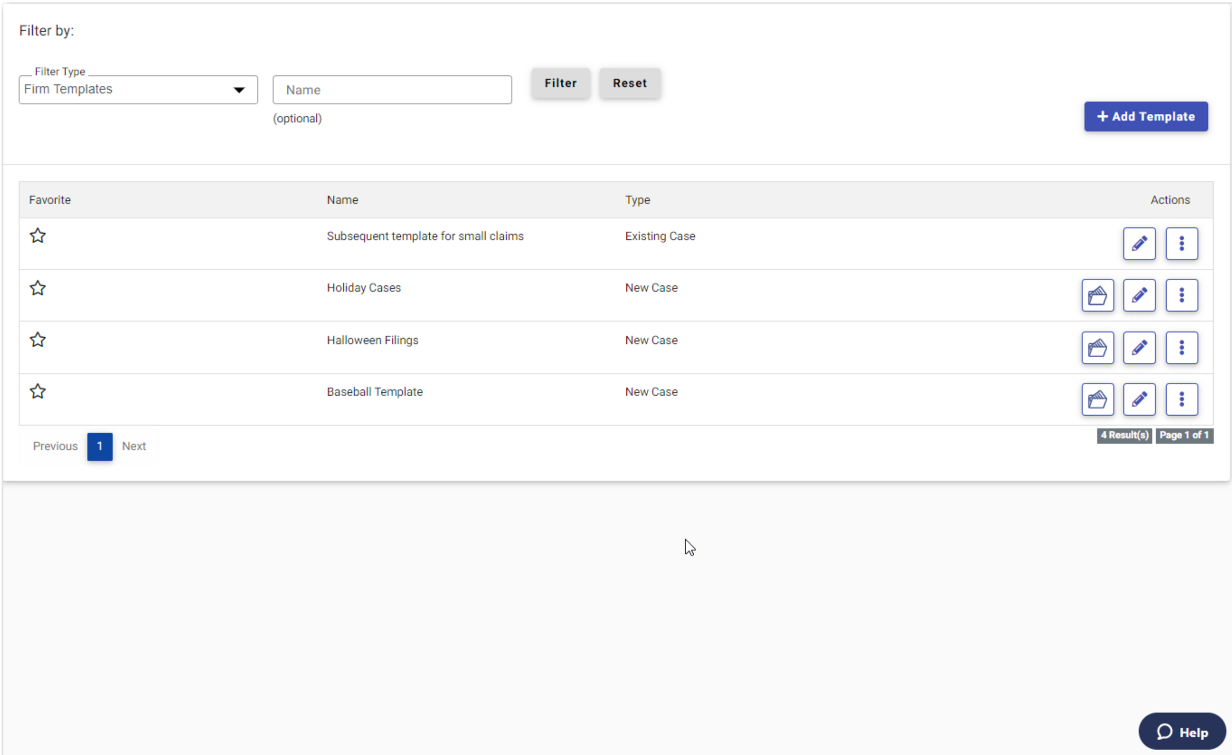


Figure 16.3 – Templates Page

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

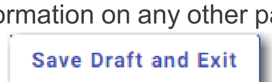
   The template name is displayed in a separate pane.

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

3. Click 

.

   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.

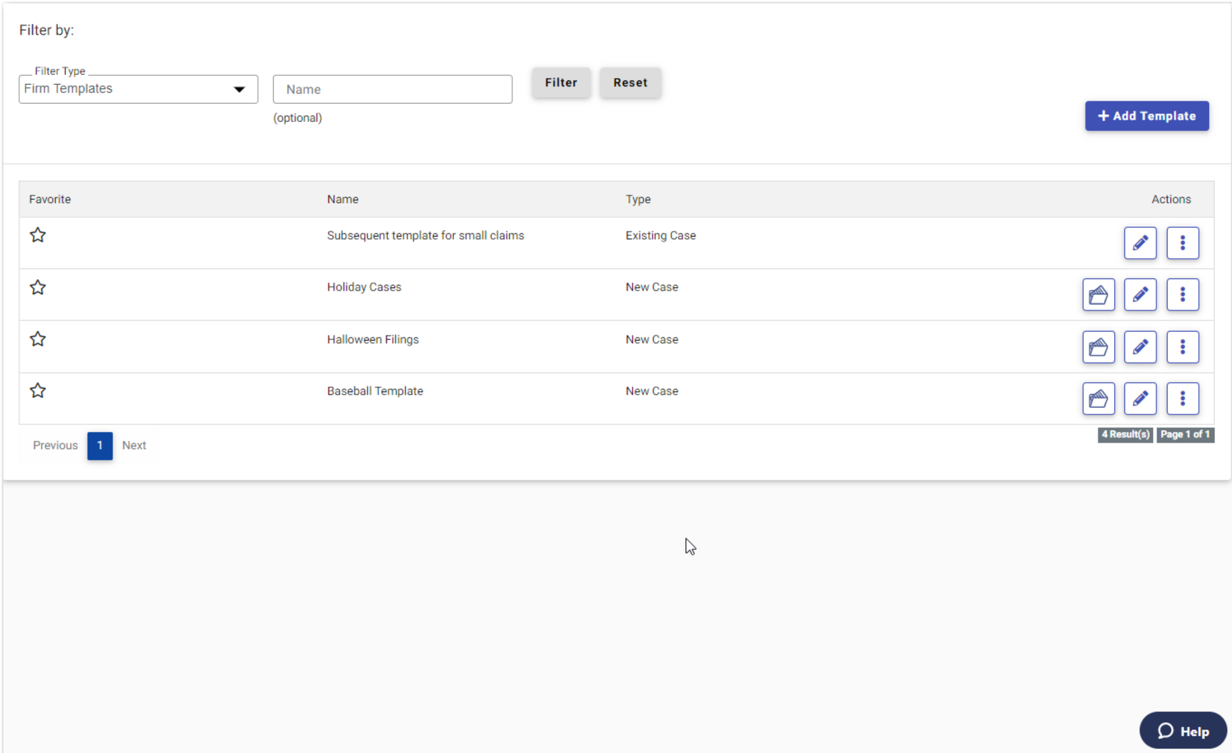
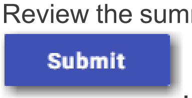


Figure 16.4 – Templates Page

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

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

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

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

.

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

Using an Existing Case Template

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

To access an existing case template:

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

   The *Filing History* page is displayed.

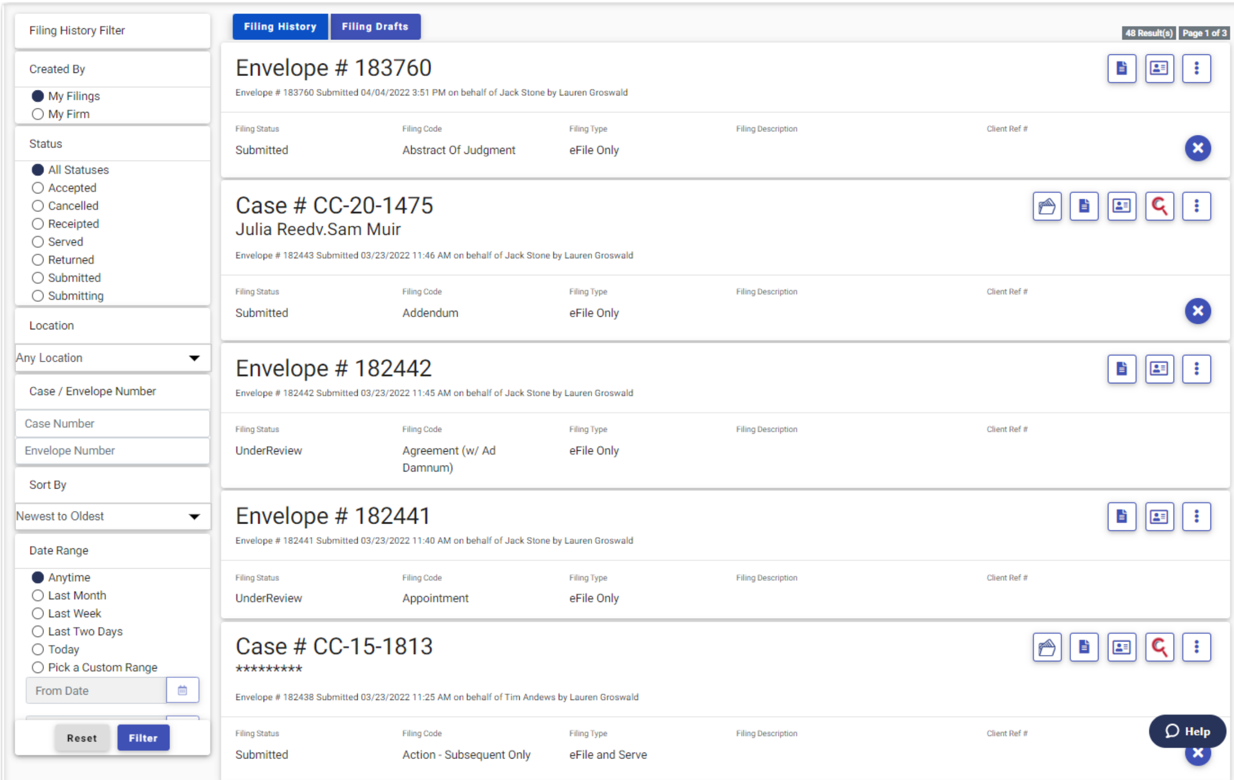


Figure 16.5 – Filing History Page

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

   A drop-down list is displayed.

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

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

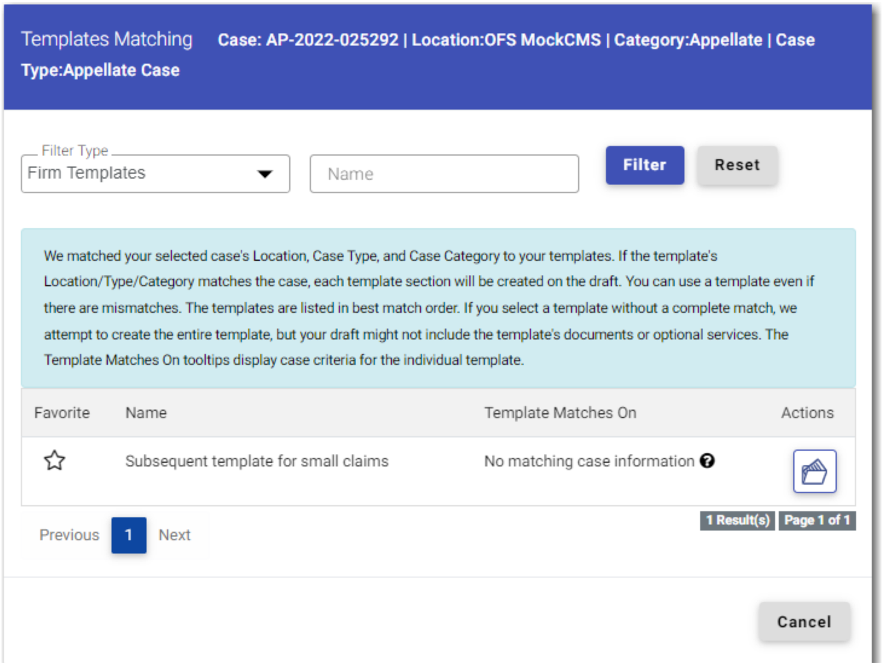
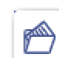
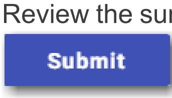


Figure 16.6 – Templates Matching Window

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

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

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

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

.

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

Copying a Template

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

To copy an existing template:

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

   The *Templates* page is displayed.

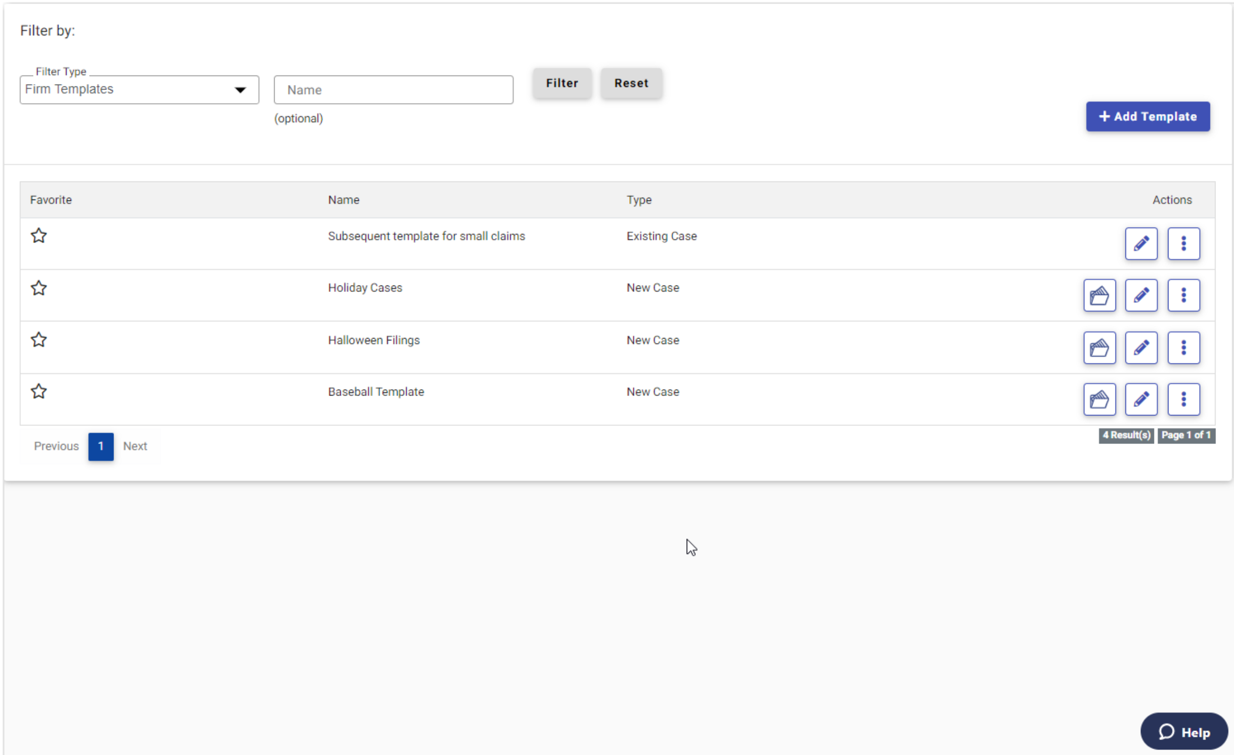
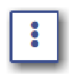


Figure 16.7 – Templates Page

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

   A drop-down list is displayed.

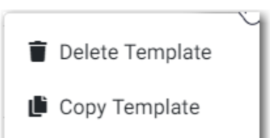


Figure 16.8 – More Options Drop-Down List

3. Click **Copy Template**.

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

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

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

 to make changes to the template.

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

Deleting a Template

You can delete a template that you no longer need.

To delete an existing template:

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

   The *Templates* page is displayed.

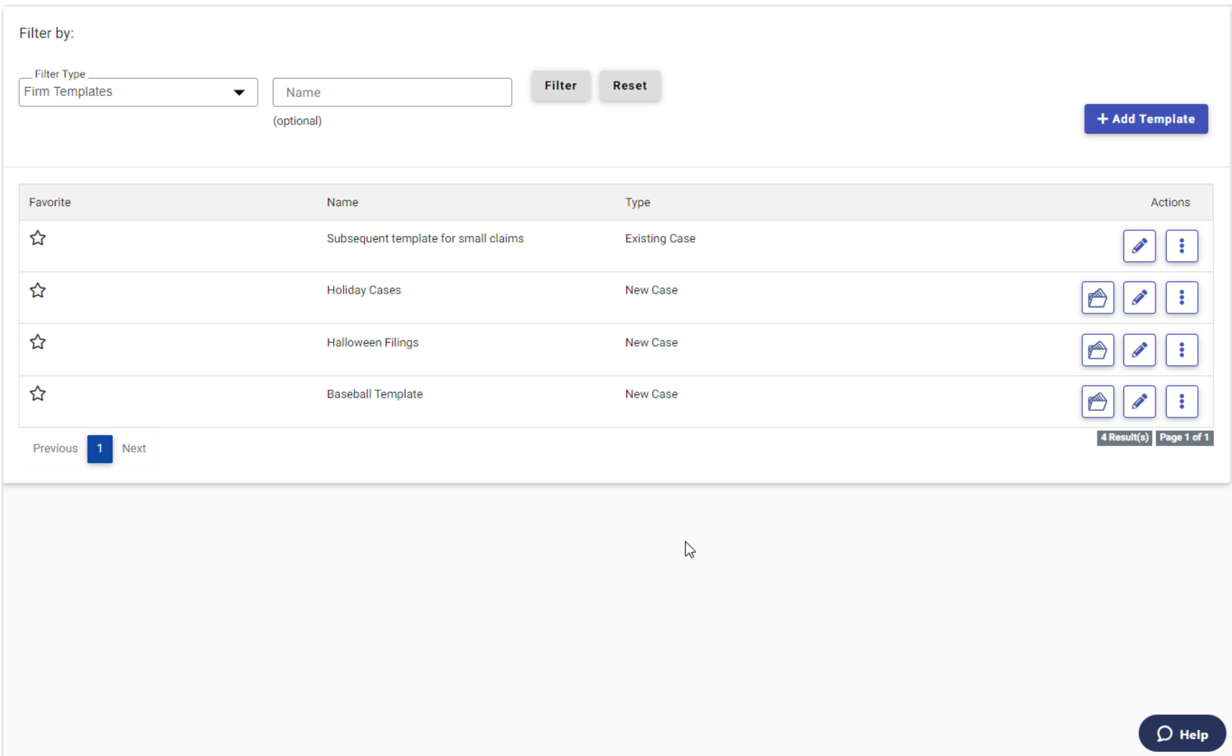


Figure 16.9 – Templates Page

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

   A drop-down list is displayed.

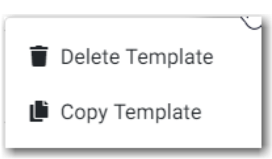
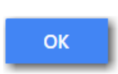
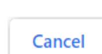


Figure 16.10 – More Options Drop-Down List

3. Click **Delete Template**.

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

4. Click 

 to delete the template, or click 

 to cancel the action.

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

17 Filings

Topics covered in this chapter

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

Copying the Envelope

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

To copy an envelope:

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

   The *Filing History* page is displayed.

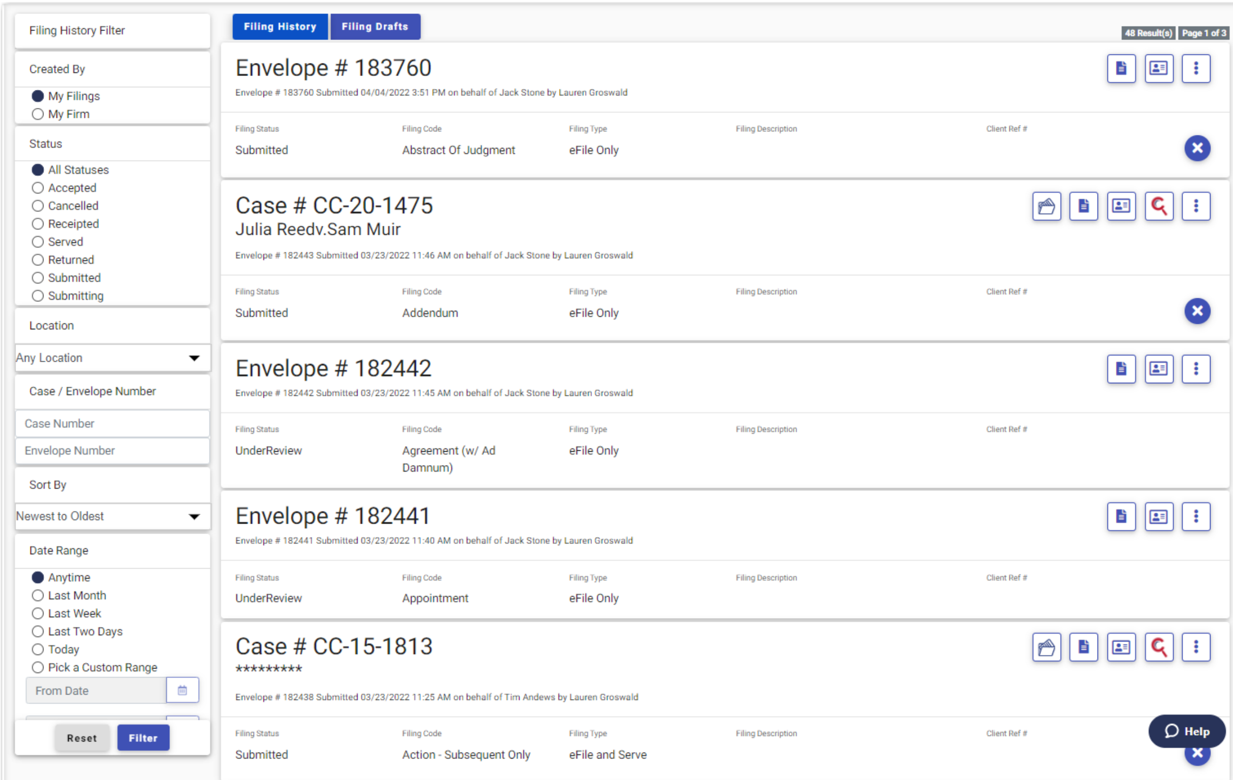


Figure 17.1 – Filing History Page

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

.

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

3. Locate the envelope that you want to copy.

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

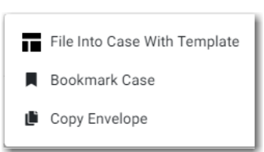


Figure 17.2 – More Options Drop-Down List

A copy of the envelope is displayed on the *Case Information* page.

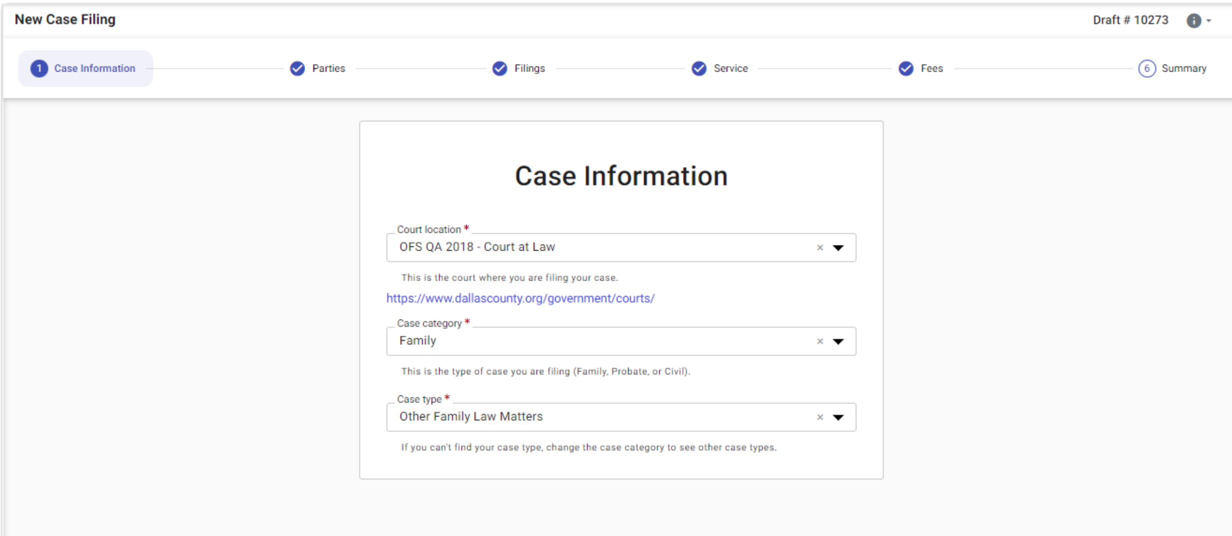


Figure 17.3 – Example of a Case Information Page for a Copied Envelope

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

6. Review the information on the *Summary* page. If everything is correct, click 

.

   Note: A message on the *Summary* page indicates that the envelope is a copy.

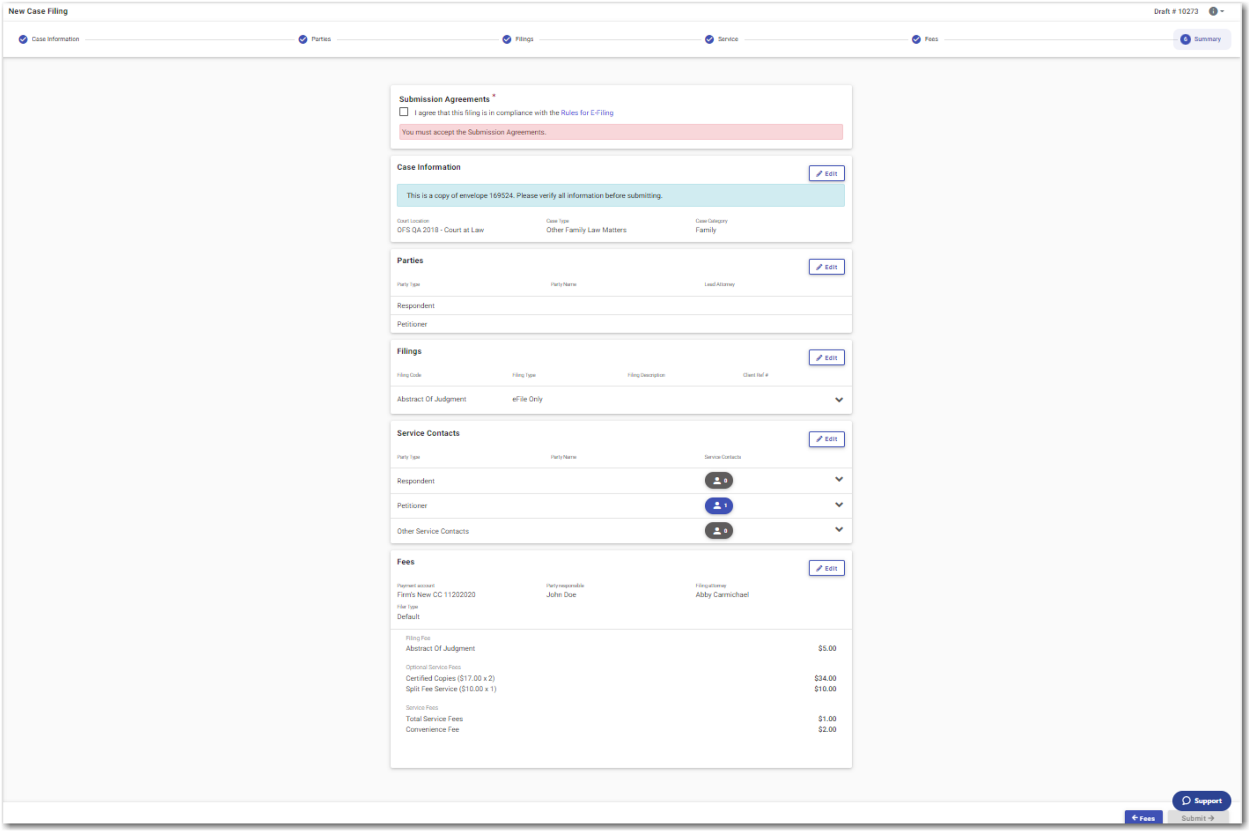


Figure 17.4 – Example of a Summary Page for a Copied Envelope

Viewing the Envelope Details

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

To view the envelope details:

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

   The *Filing History* page is displayed.

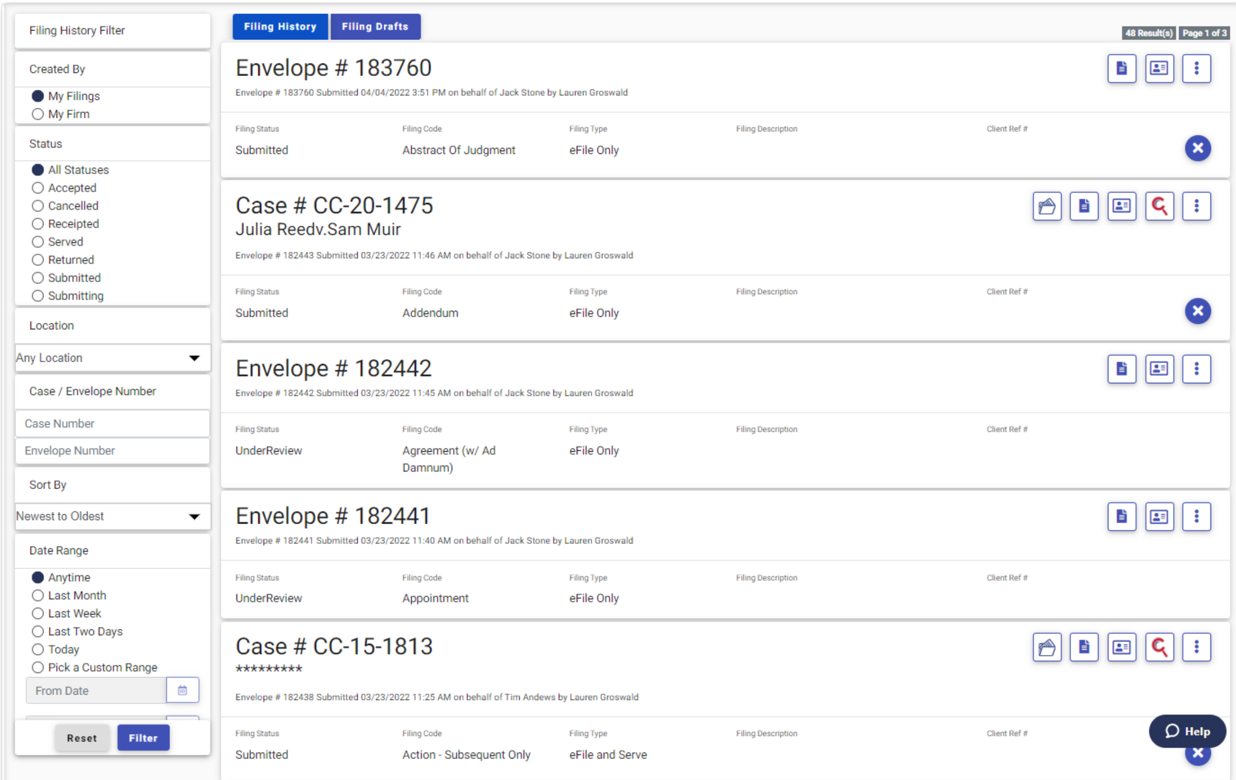


Figure 17.5 – Filing History Page

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

   The envelope details are displayed.

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

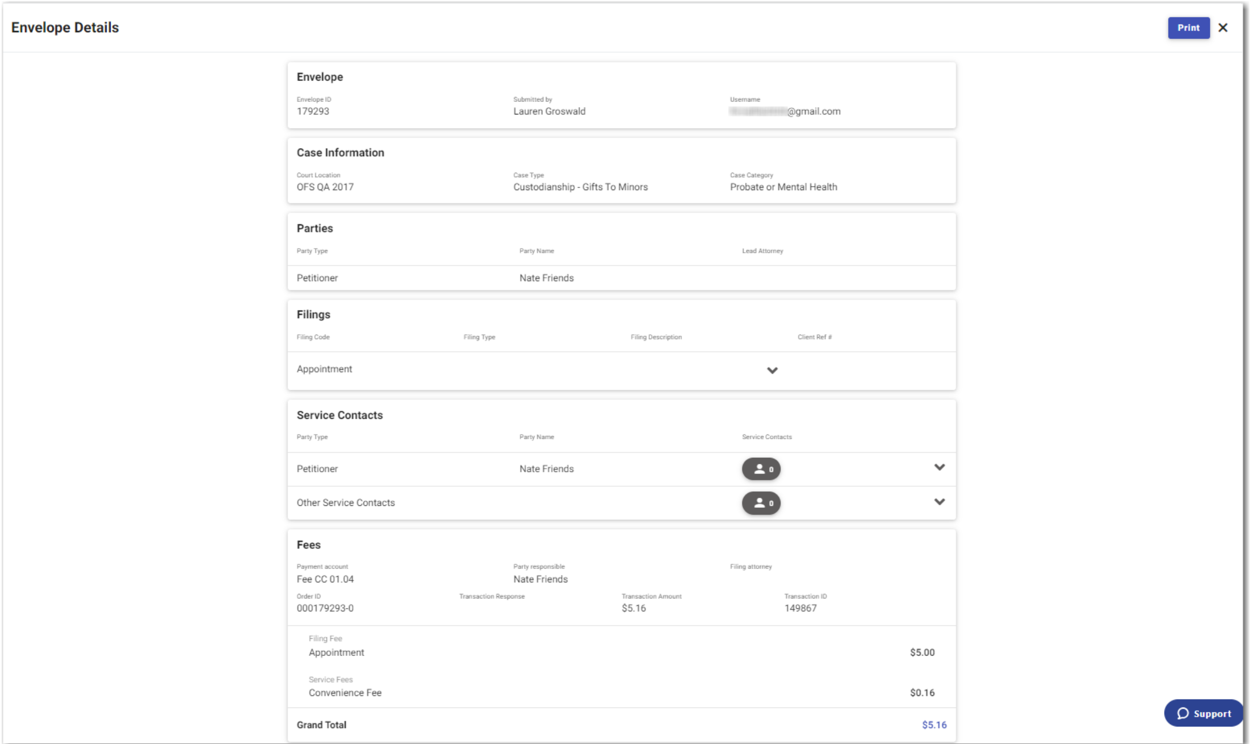


Figure 17.6 – Example of an Envelope Details Page

4. Click 

to print a copy of the envelope details.

Viewing Case Address Information in the Envelope Details

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

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

To view the case address information in the envelope details:

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

   The *Filing History* page is displayed.

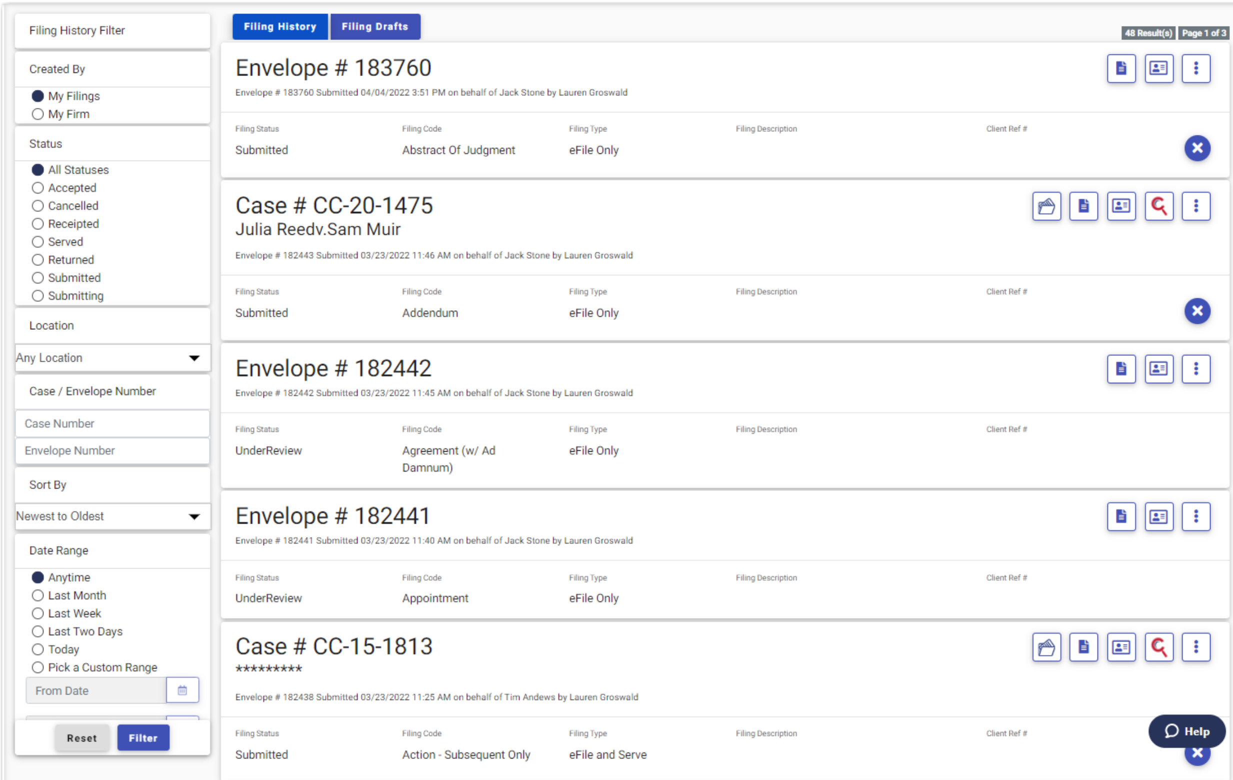


Figure 17.7 – Filing History Page

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

   The envelope details are displayed.

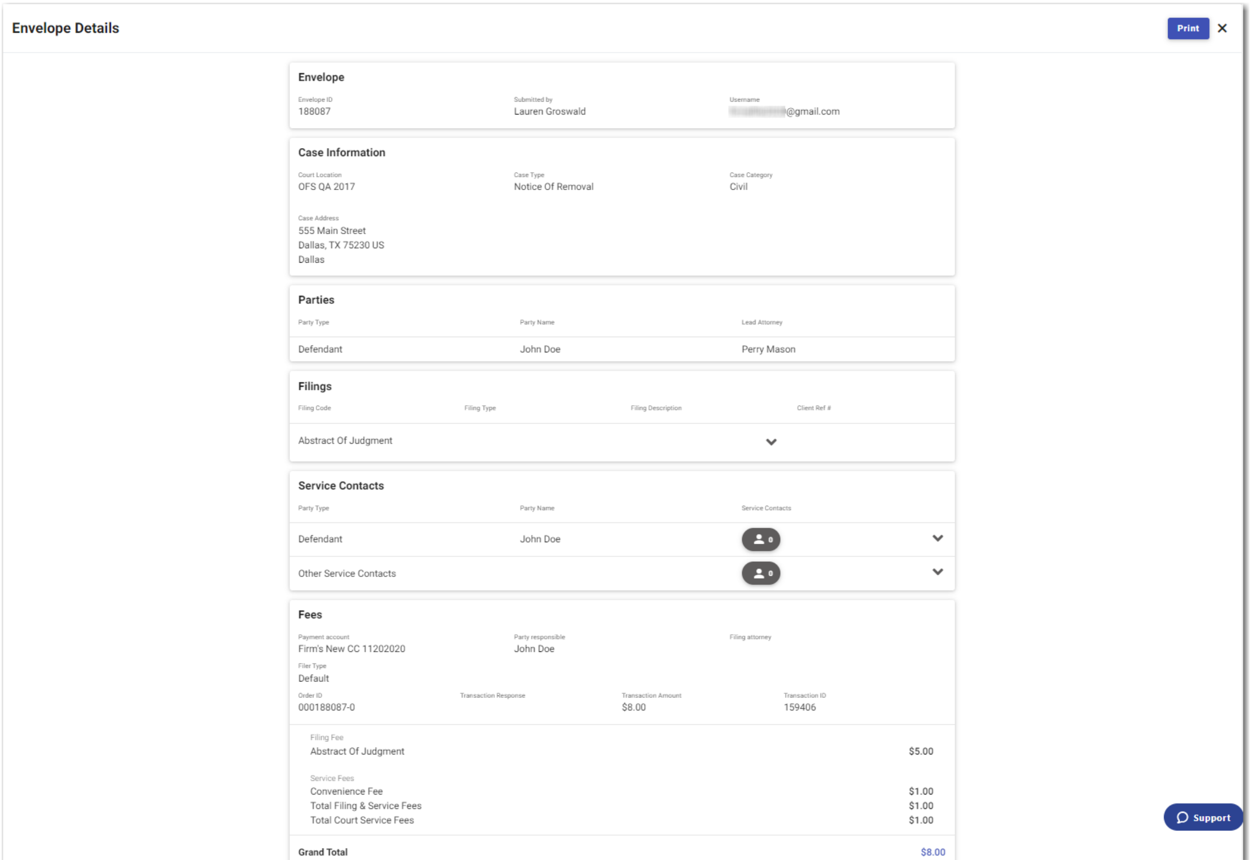


Figure 17.8 – Case Address Information on the Envelope Details Page

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

To view the mail service fees in the envelope details:

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

   The *Filing History* page is displayed.

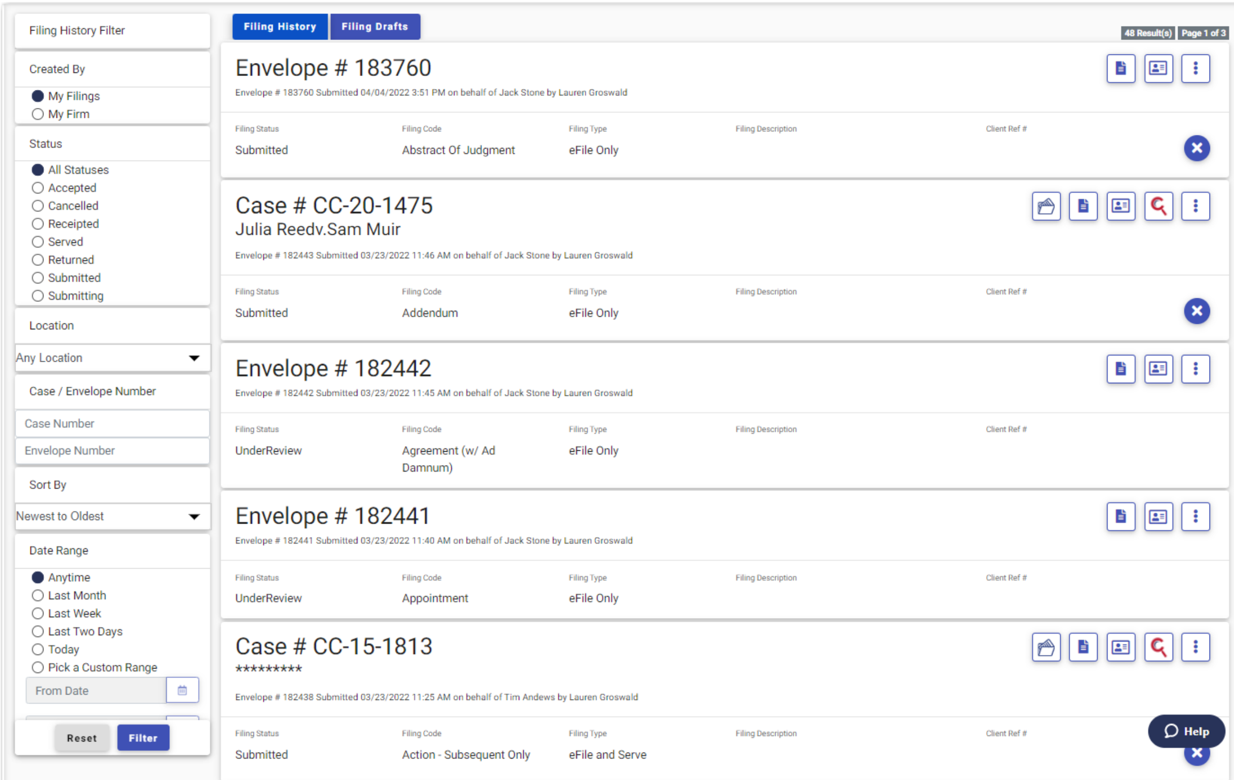


Figure 17.9 – Filing History Page

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.

   Note: Your screen may differ from the example provided below.

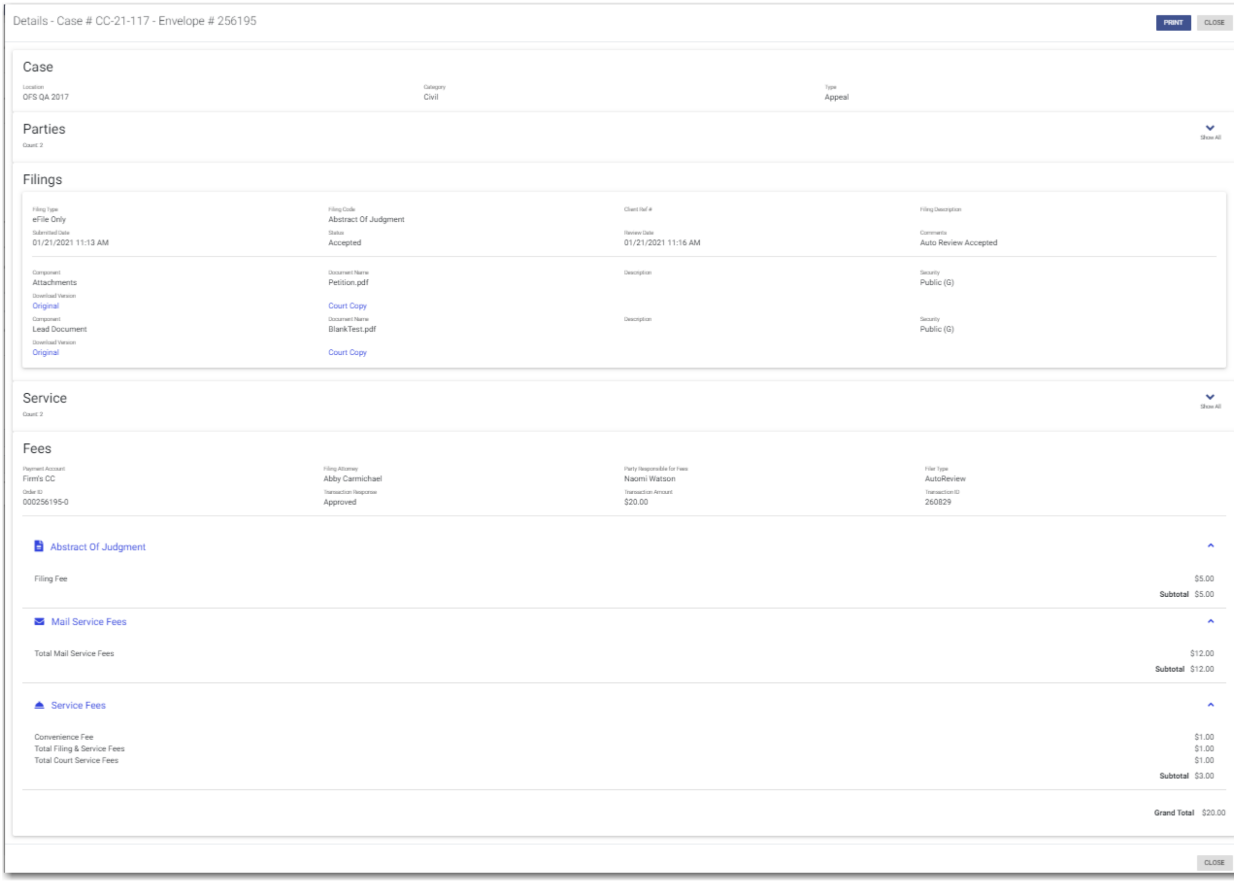


Figure 17.10 – Example of an Envelope Details Page with the Mail Service Fees Displayed

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

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

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

   The *Filing History* page is displayed.

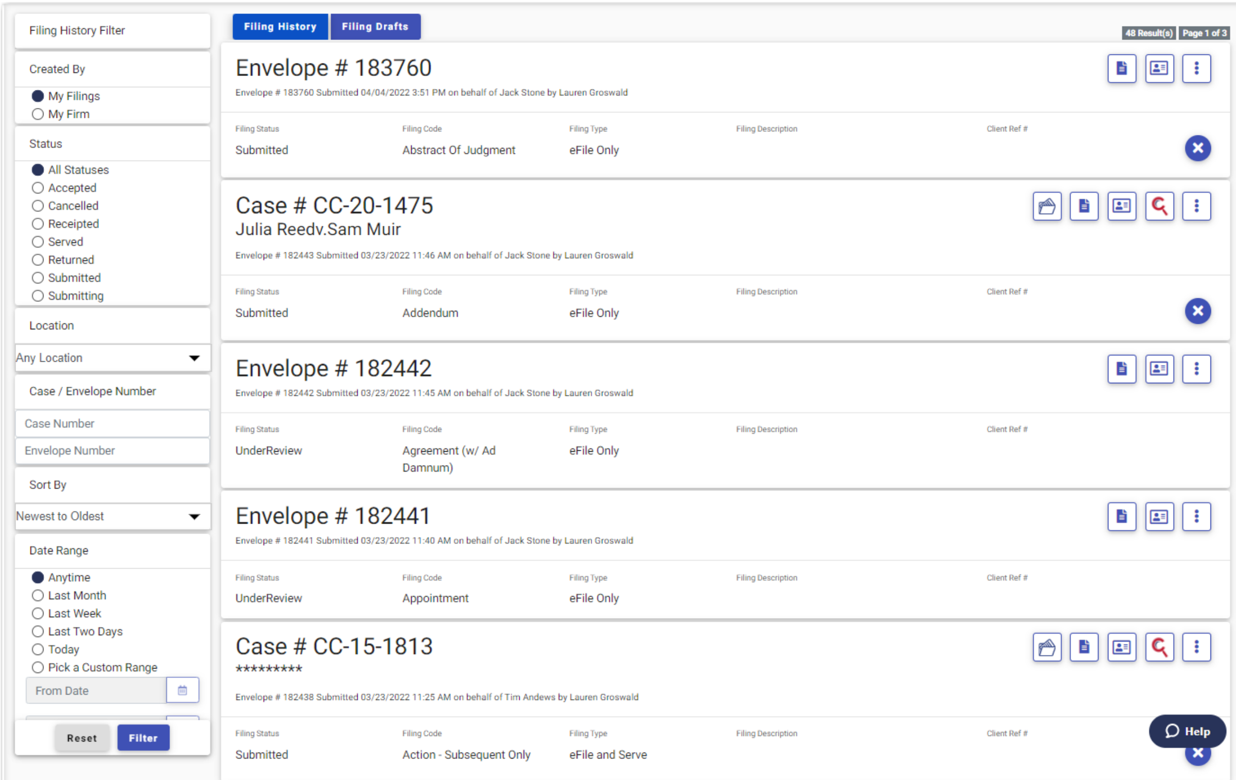


Figure 17.11 – Filing History Page

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

3. Click .

   The envelope details are displayed.

   Note: Your screen may differ from the example provided below.

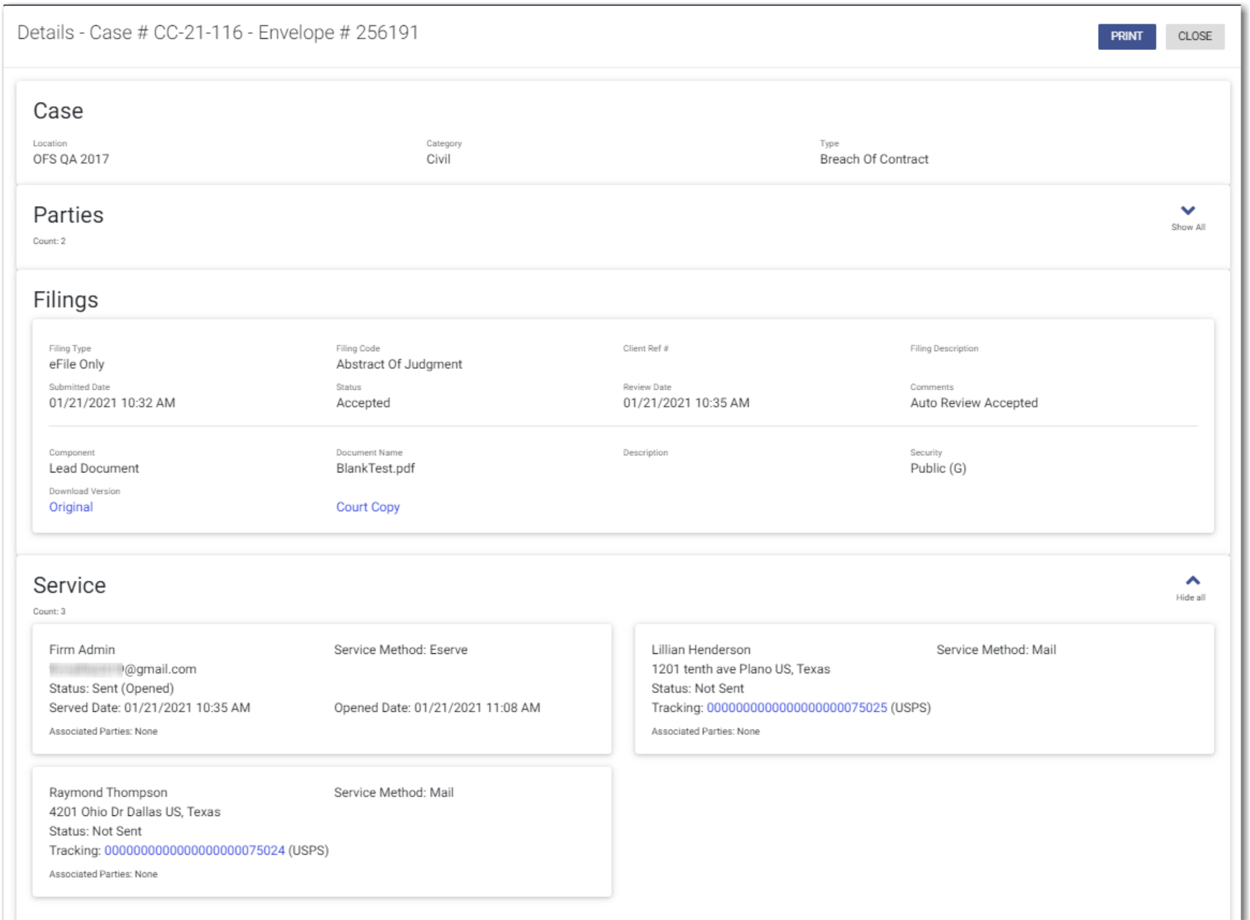


Figure 17.12 – Example of an Envelope Details Page with the Certified Mail Services Information Displayed

In the Service pane, you can view information about the status of 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.

Viewing Envelope Level Information in the Envelope Details

You can view the envelope comments that were added to a case filing in the envelope details.

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

To view the envelope comments in the envelope details:

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

   The *Filing History* page is displayed.

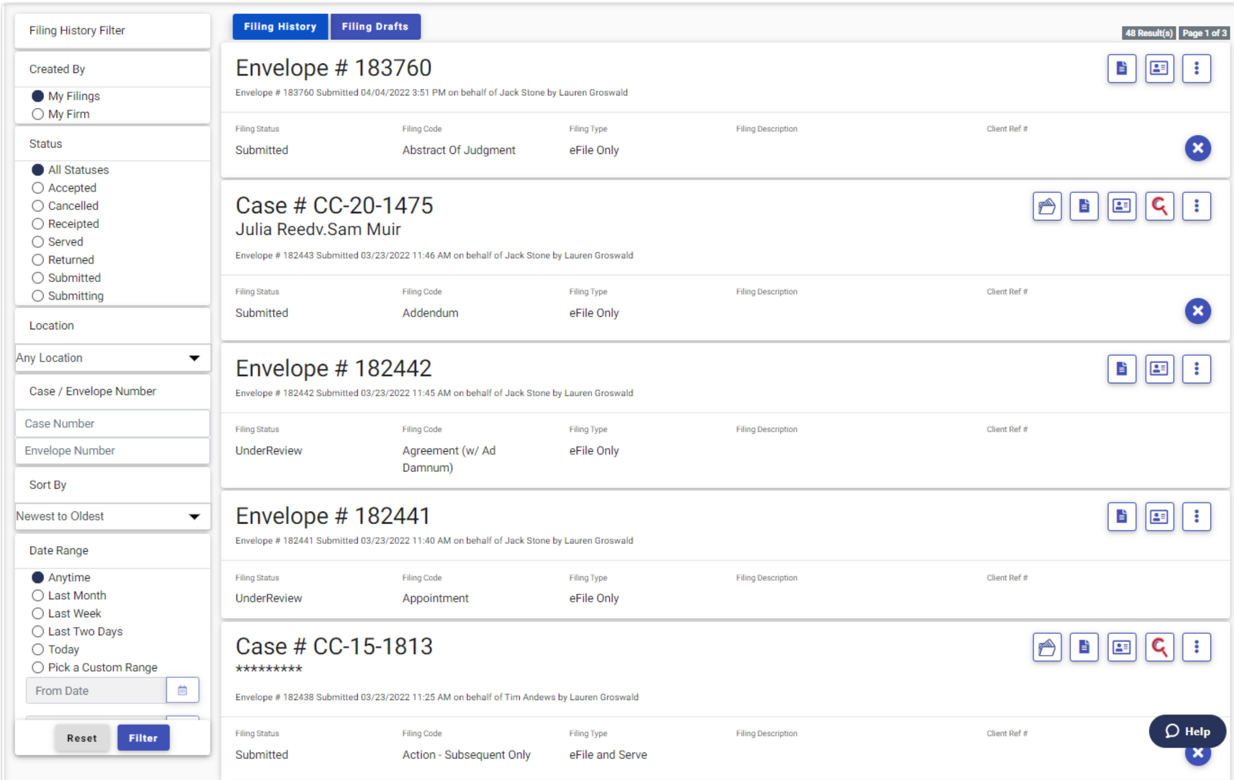


Figure 17.13 – Filing History Page

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

3. Click .

   The envelope comments are displayed in the envelope details in the Case pane.

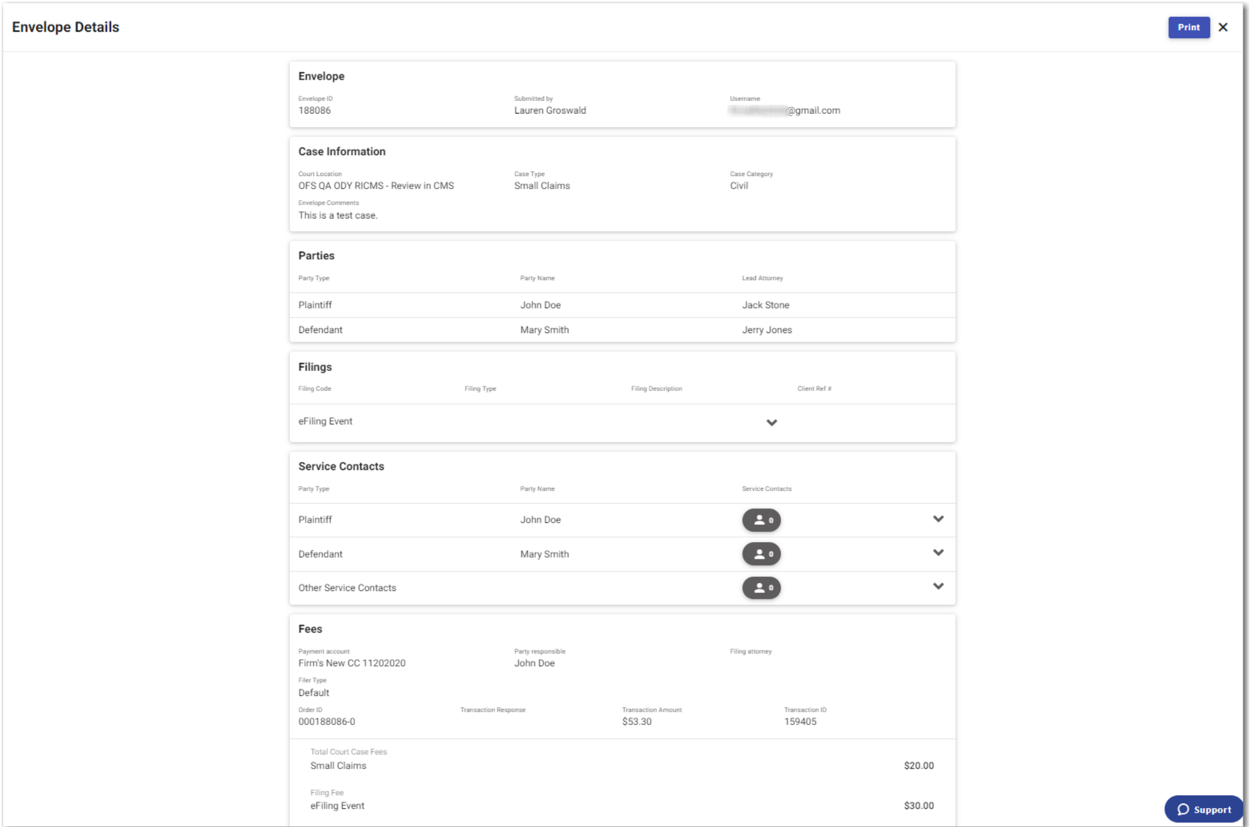


Figure 17.14 – Example of an Envelope Details Page with the Envelope Comments Displayed

4. Click 

to print a copy of the envelope details.

Resuming a Case Filing

You can resume a case filing even if you have signed out of File & Serve or have exited the filing process. You do so by signing back in to File & Serve, if necessary, and then accessing your case on the *Filing Drafts* page.

To resume a case filing:

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

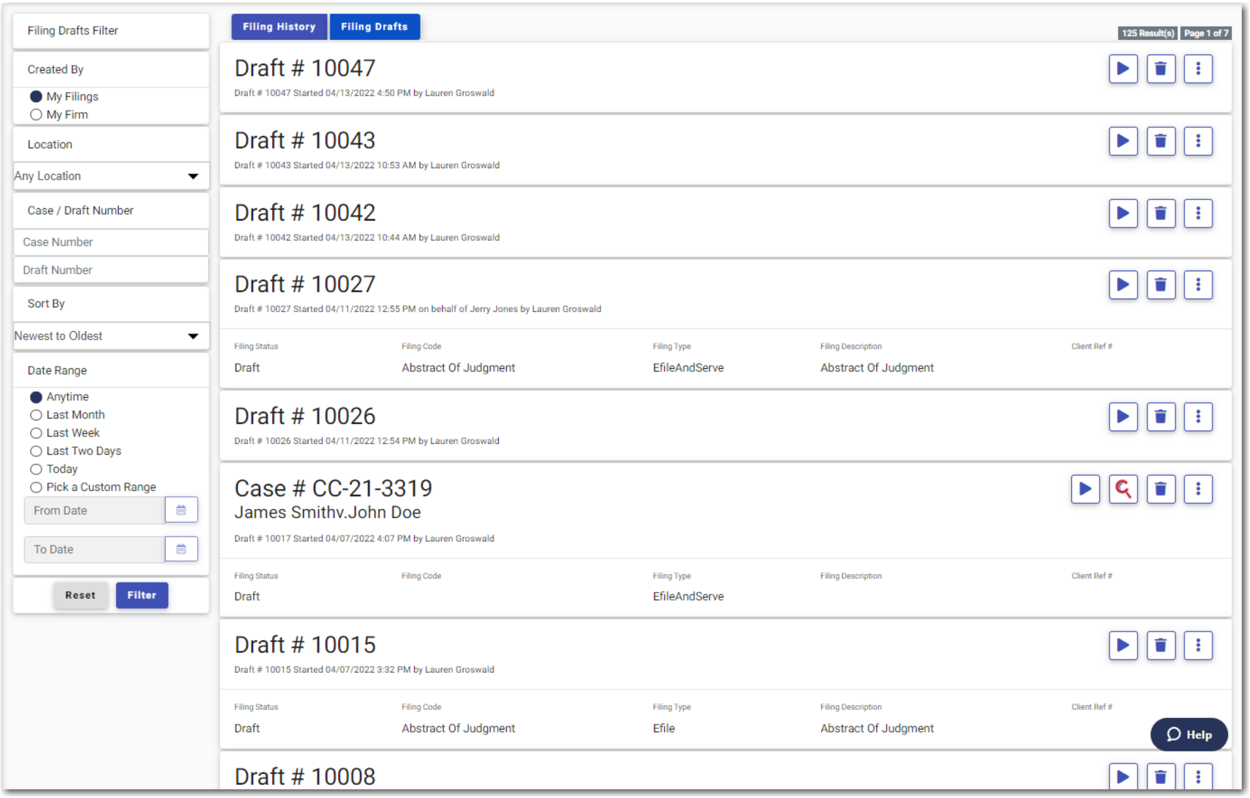


Figure 17.15 – Filing Drafts Page

2. Click  .

   The filing opens on the page where you previously stopped working.

3. 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.

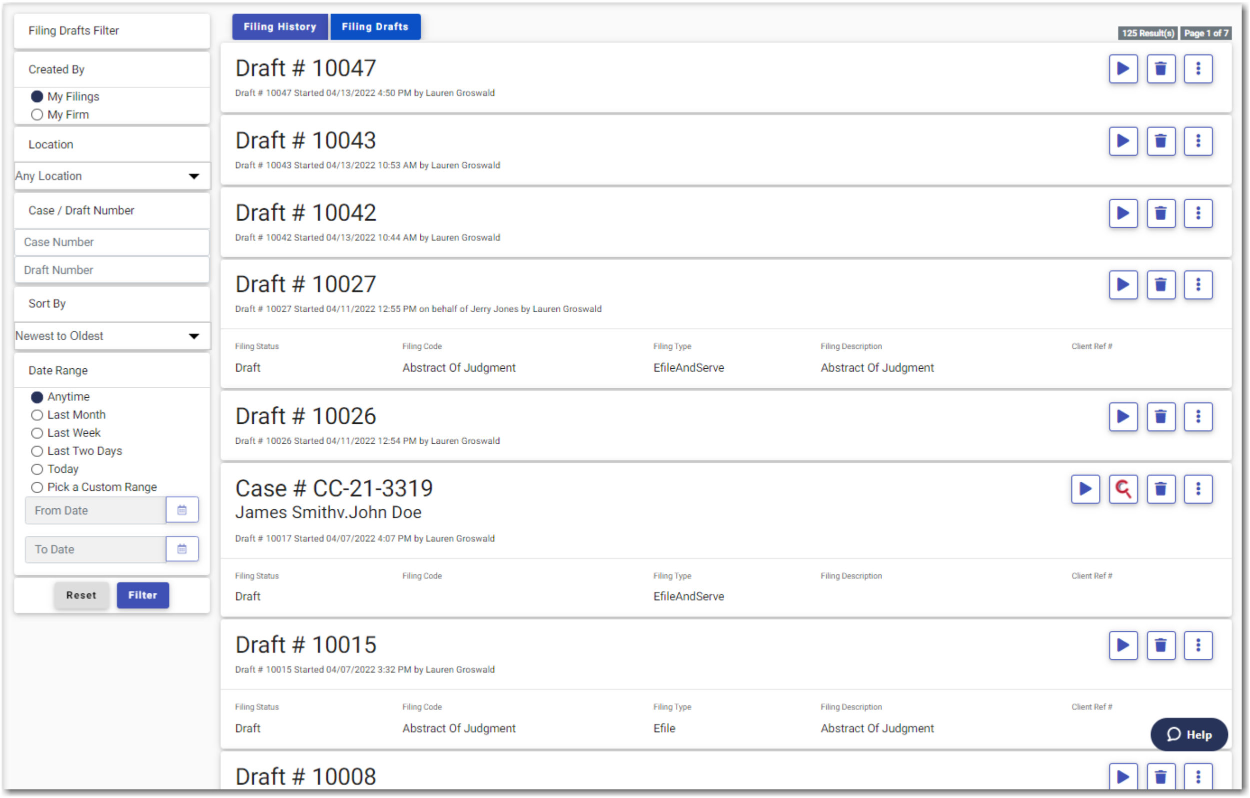
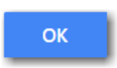
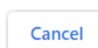


Figure 17.16 – Filing Drafts Page

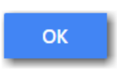
2. Locate the draft filing that you want to delete, and then click  .

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

3. Click 

 to delete the draft filing, or click 

 to cancel the action.

   If you clicked 

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

Canceling a Filing

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

To cancel a filing:

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

   The *Filing History* page is displayed.

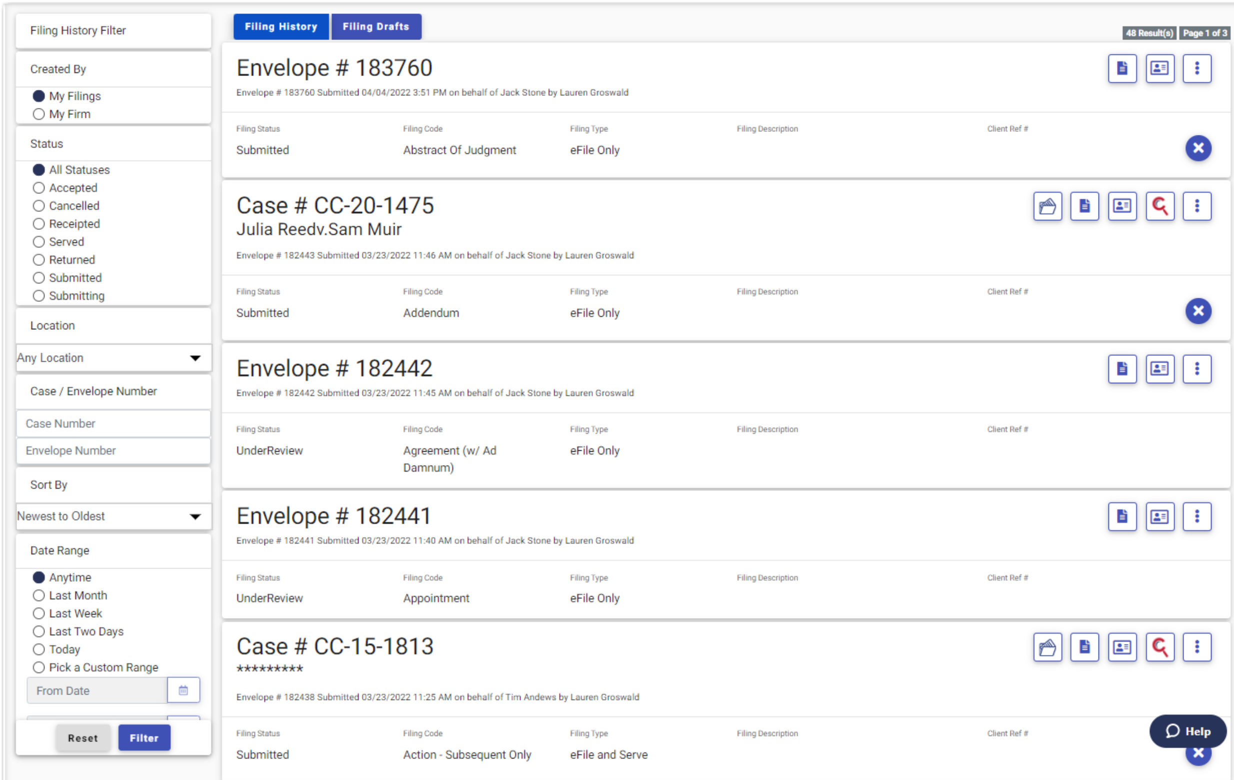


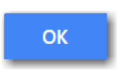
Figure 17.17 – Filing History Page

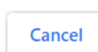
2. Locate the filing that you want to cancel.

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

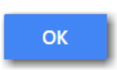
3. Click .

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

4. Click 

 to cancel the filing, or click 

 to cancel the action.

   If you clicked 

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

18 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 other user can see your case list.

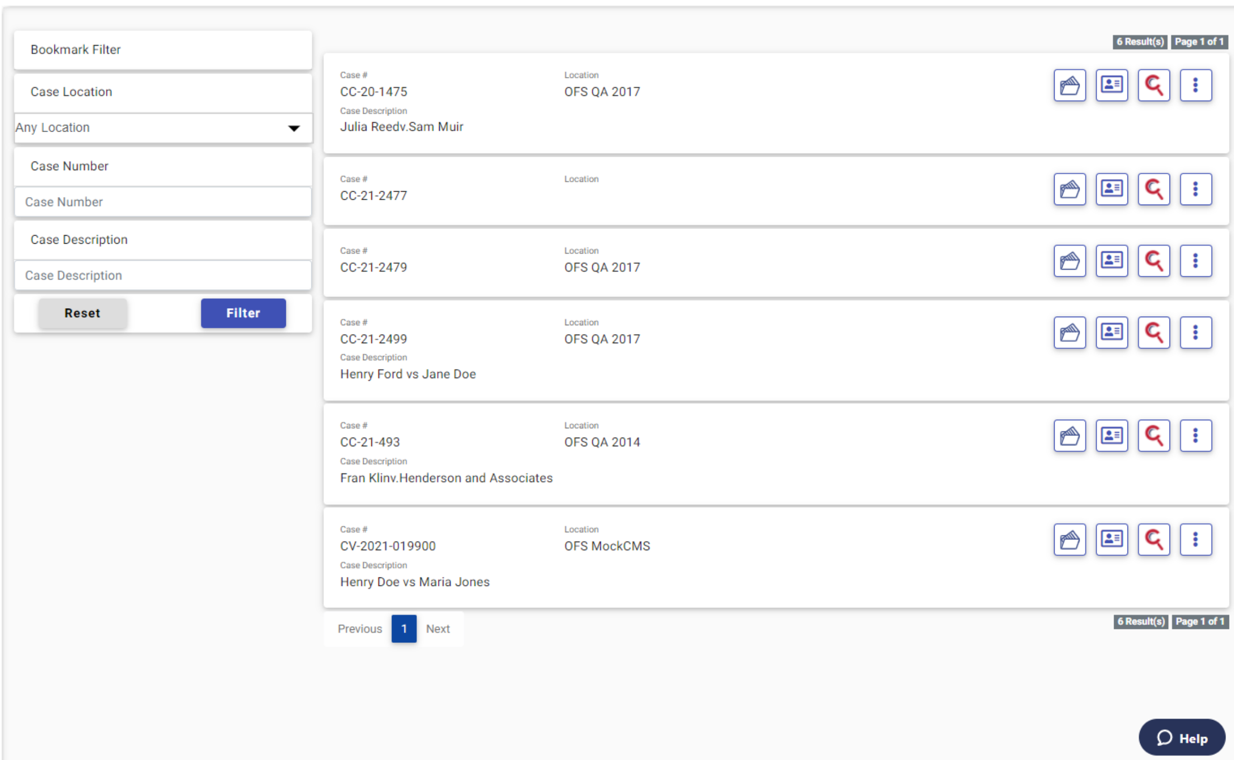


Figure 18.1 – Example of a Bookmarks Page

Creating a Bookmark for a Case

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

To create a bookmark for a case:

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

   The page that you selected is displayed.

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

   A drop-down list is displayed.

3. Select **Bookmark Case**.

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

Removing a Bookmark from a Case

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

To remove an existing bookmark from a case:

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

   The *Bookmarks* page is displayed.

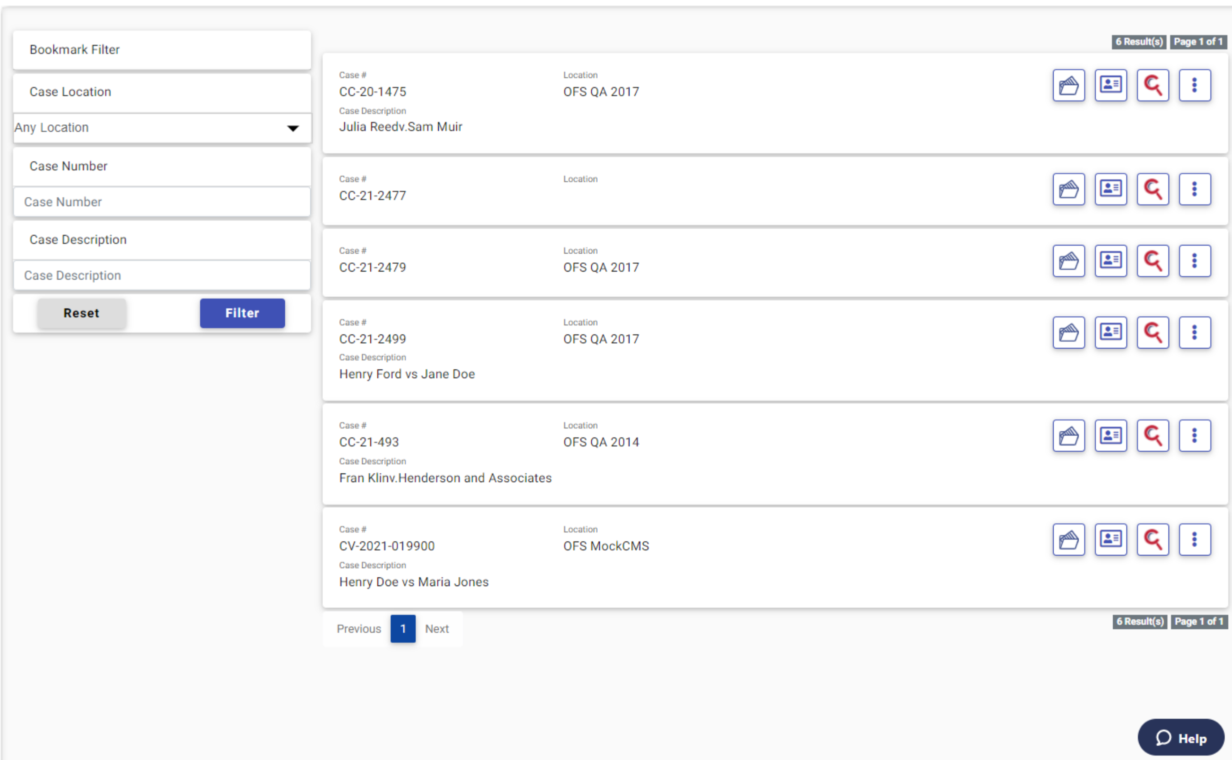


Figure 18.2 – Example of a Bookmarks Page

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

   A drop-down list is displayed.

3. Select **Remove Bookmark**.

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

4. Click OK to remove the bookmark, or click Cancel to cancel the action.

Viewing a List of Bookmarked Cases

You can view a list of the cases that you have bookmarked for quick access. You can filter your view to only the specific cases that you want to see.

To view a list of cases that you have bookmarked:

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

   The *Bookmarks* page is displayed.

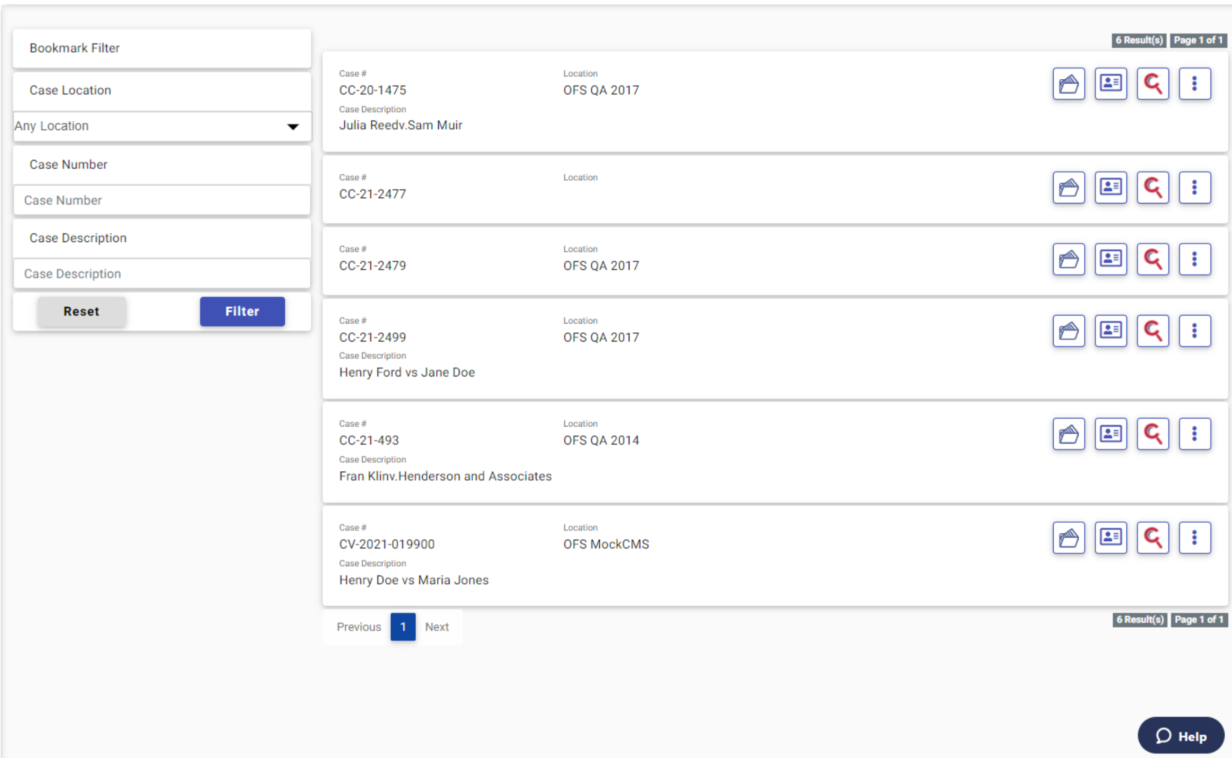


Figure 18.3 – Example of a Bookmarks Page

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.

19 Bulk Filing

Topics covered in this chapter

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

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

To set up a bulk filing, first access the *Start Filing* page. Then, complete the required fields for the first draft, followed by the next draft, and so forth. After you have prepared all of the drafts for a bulk filing, you can view the fees for each draft, and choose the party responsible for fees, along with the payment method, for each draft. When you are done, you can submit the bulk filing 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 by using the **Bulk Add Filings** feature.

Click 

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

Dashboard

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

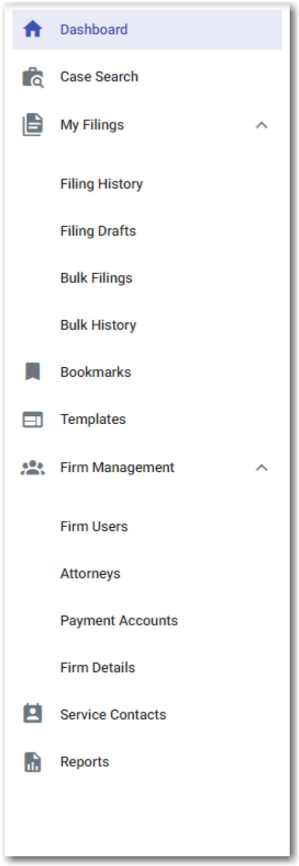


Figure 19.1 – Dashboard

From the Dashboard, you can perform the following additional actions for bulk filing:

- Access the *Dashboard* page to start an initial or subsequent bulk filing, view your bulk filing history, and view your bulk filing drafts.
- For subsequent bulk filings, you can add cases from the *Case Search* page.
- For subsequent bulk filings, you can add cases from the *Filing History* page.
- Access the *Bulk Drafts* page to view a list of your or your firm's bulk draft filings.
- Access the *Bulk History* page to view a list of your or your firm's bulk filings.

For information regarding the other options displayed on the Dashboard, refer to Dashboard, page 33.

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 filing.

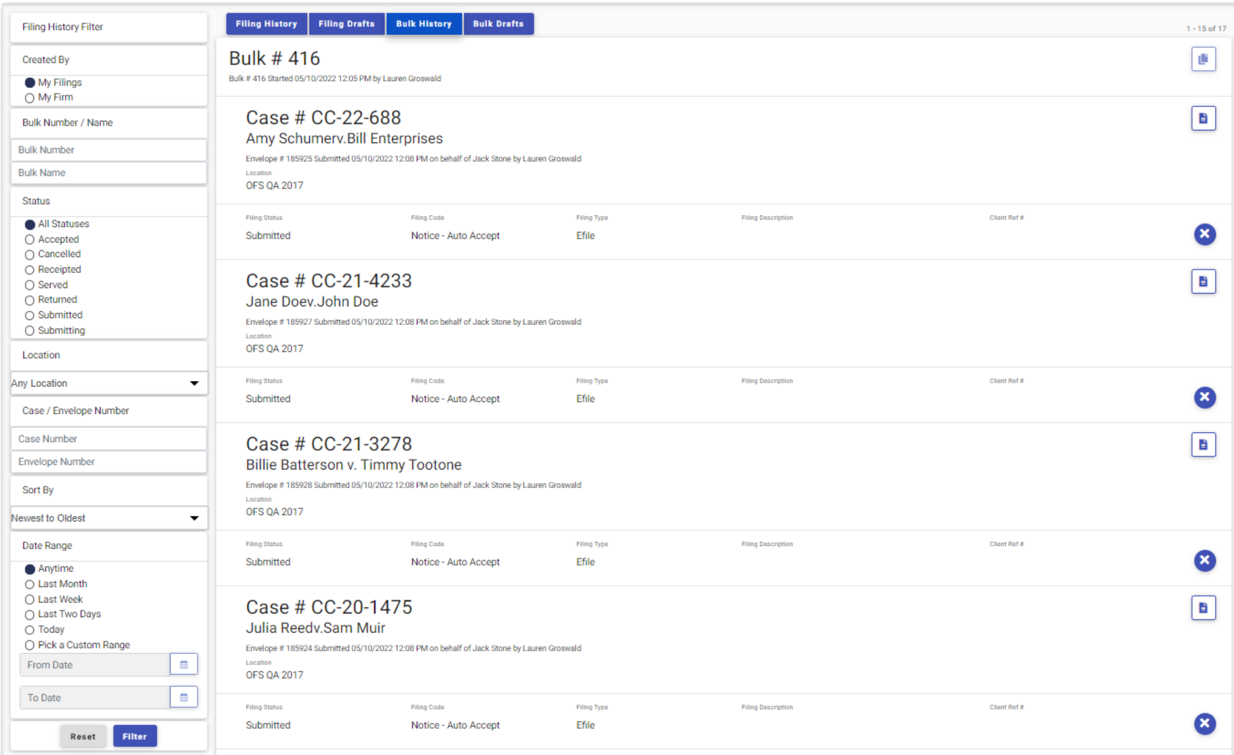


Figure 19.2 – Example of a Bulk History Page

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 filing drafts, resume a bulk filing draft, or delete a bulk filing draft.

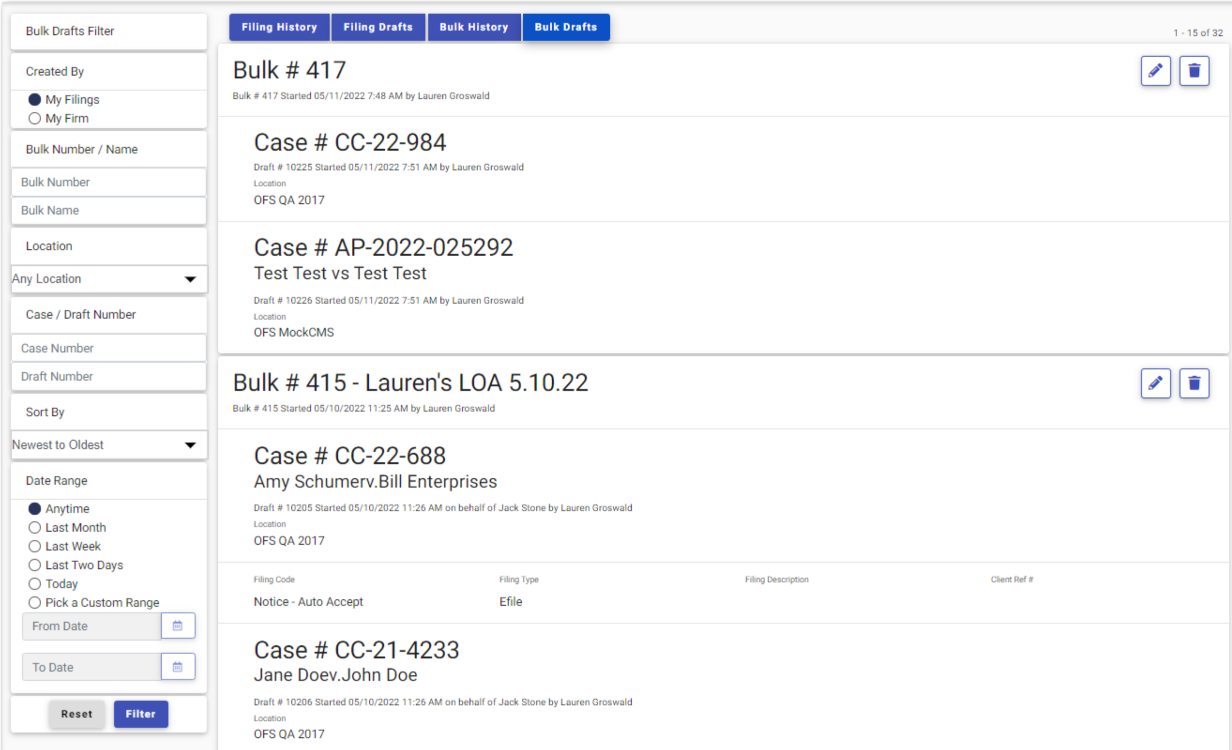


Figure 19.3 – Example of a Bulk Drafts Page

Starting Multiple New Case Filings

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

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

To start multiple new case filings:

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

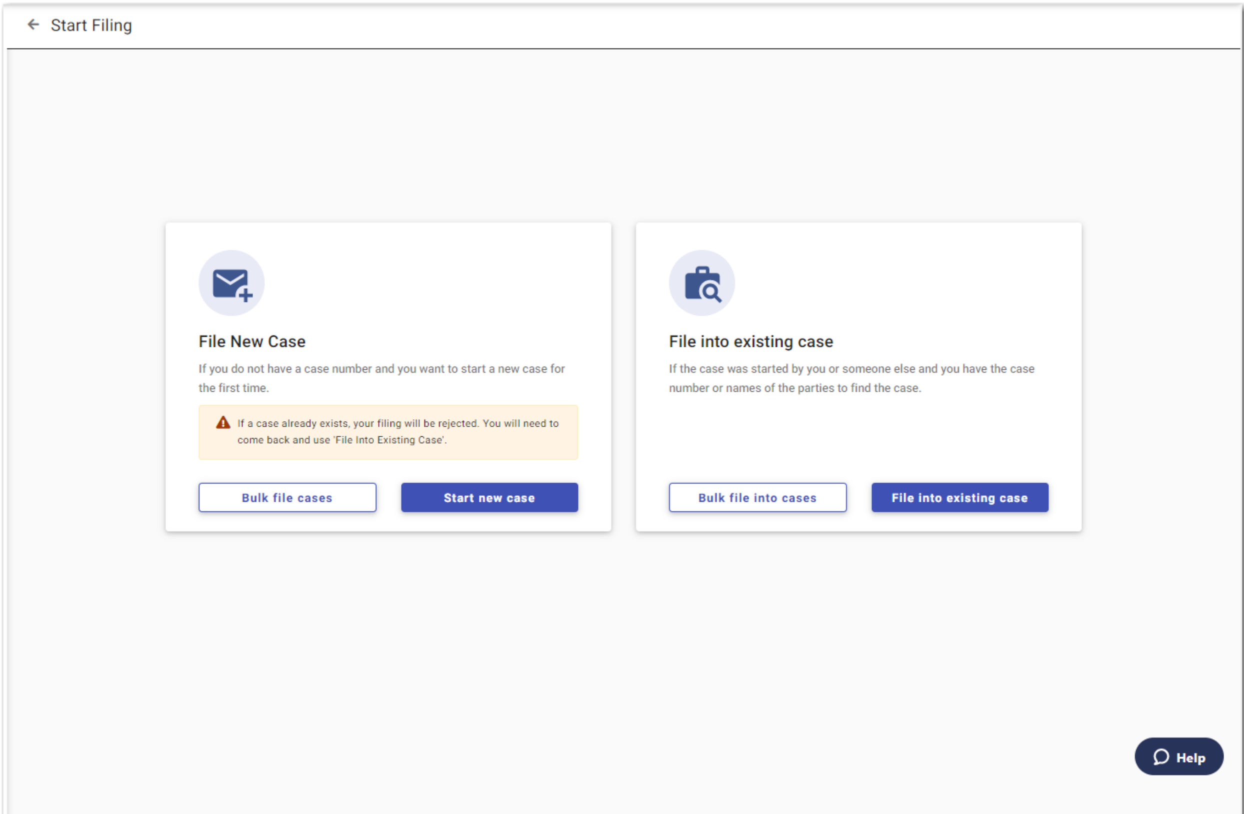


Figure 19.4 – Start Filing Page

2. Click  .

   The *Bulk Filing* window is displayed.

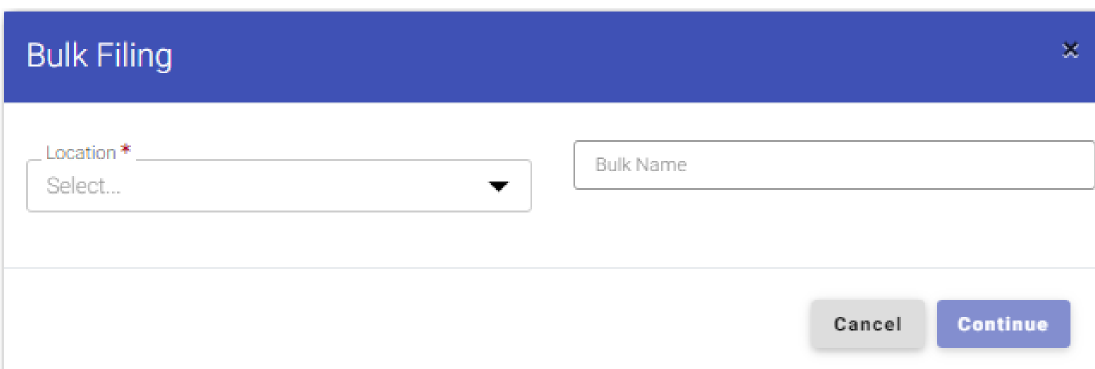


Figure 19.5 – Bulk Filing Window

3. Select the location from the **Location** drop-down list.
4. Type a name for the bulk filing, and then click  .

   The *Bulk Filing Dashboard* page is displayed.

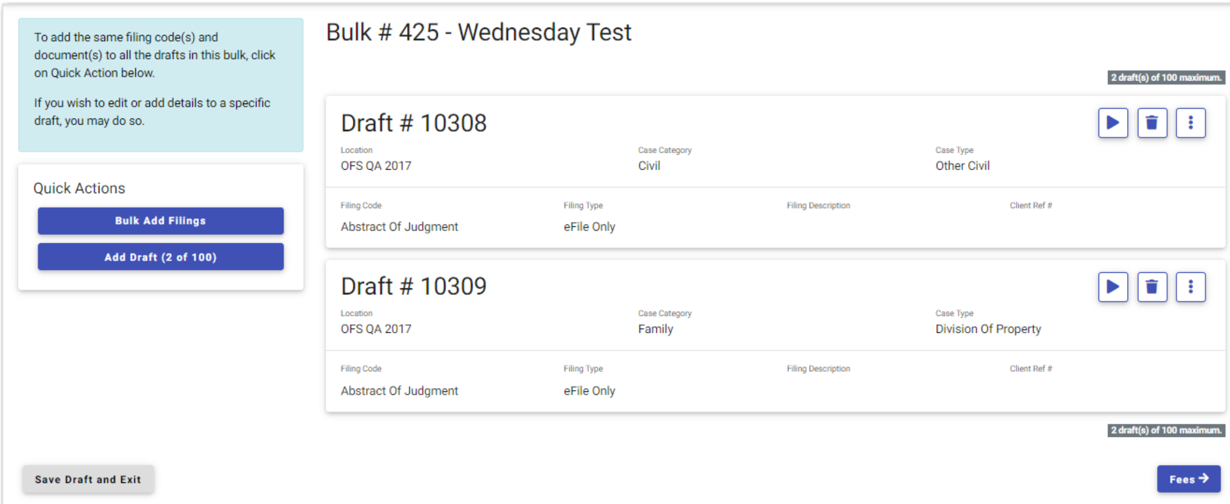


Figure 19.6 – Example of a Bulk Filing Dashboard

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

5. Click 

.

Note: If there is a limit configured for the maximum number of drafts, then the number is displayed on the Add Draft button. The number reflects which draft filing you are about to add (for example, “2 of 100”).

The *Case Information* page is displayed.

Entering Case Information for a Bulk Filing

Before you can start a bulk filing, you must set up a payment account.

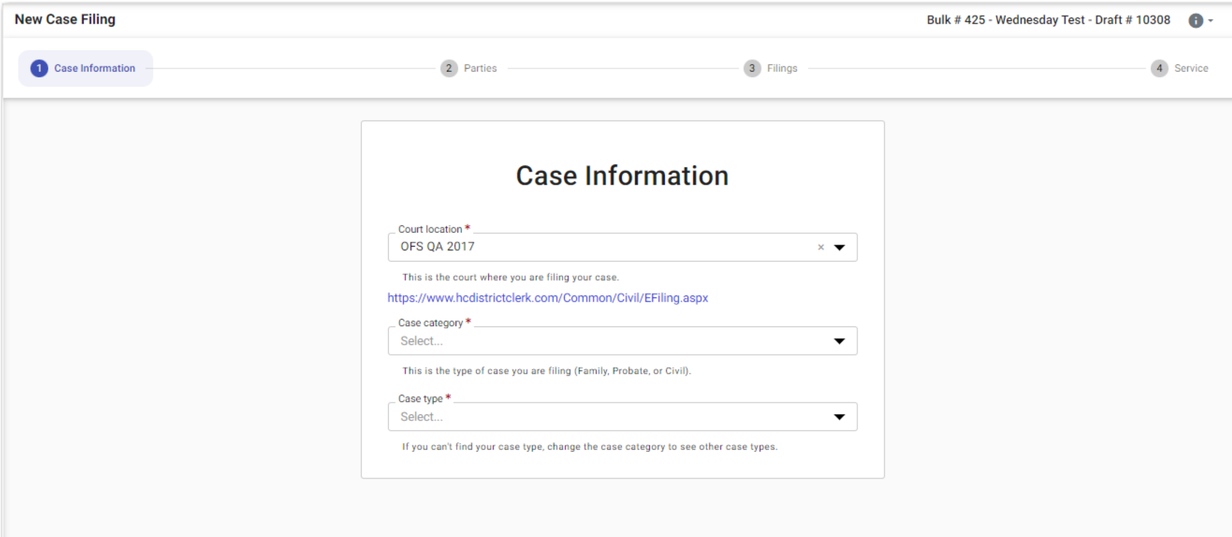


Figure 19.7 – Example of a Case Information Page

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

To enter case information:

1. Select the location from the **Court Location** drop-down list.
2. Select the case category from the **Case Category** drop-down list.
3. Select the case type from the **Case Type** drop-down list.
4. Complete the other fields, as applicable.
5. Click 

to save your work and to continue.

Entering Party Details for a Bulk Filing

Each bulk filing requires a party type.

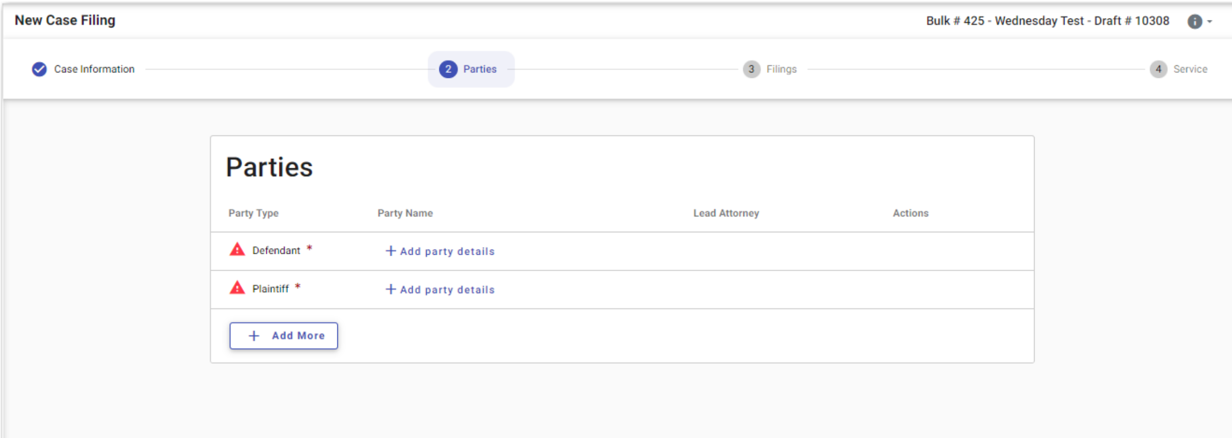
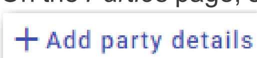


Figure 19.8 – Example of a Parties Page in a Bulk Filing

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 *Parties* page, select the party type that you want to begin to describe, and then click 

.

   The *Edit Party Details* window for the specified party is displayed.

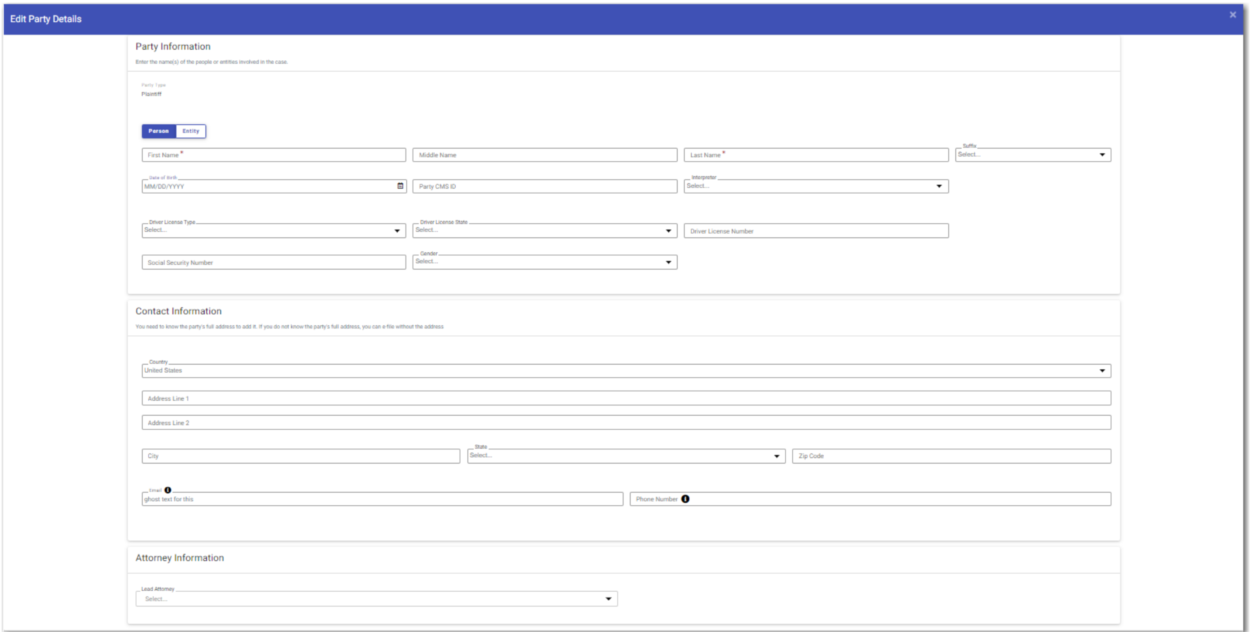
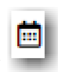


Figure 19.9 – Example of the Edit Party Details Window

2. Click either **Person** or **Entity**.

   Note: The following steps describe the fields that are displayed if you select "Person."

3. In the Party Information pane, 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.
4. Type the party's date of birth in the **Date of Birth** field, or click  to select the date from the calendar.
5. Type the party case management system ID in the **Party CMS ID** field, if appropriate.
6. Select a language from the **Interpreter** drop-down list, if appropriate.
7. Select the type of driver's license from the **Drivers License Type** drop-down list.
8. Select the state where the driver's license was issued from the **Drivers License State** drop-down list.
9. Type the party's driver's license number in the **Drivers License Number** field.
10. 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.

11. Select the party's gender from the **Gender** drop-down list.
12. In the Contact Information pane, enter the country, address, city, state, ZIP code, and phone number for the specified party.
13. In the Attorney Information pane, from the **Lead Attorney** drop-down list, select the filing attorney.
14. From the next field that is displayed, select additional attorneys, if any, that you want to add to the case.
15. After all of the required fields for the specified party are completed, click **Save**.
16. On the *Parties* page, complete the party information for the next party.

17. If you have another party to add to the case, click , and complete the party information for the additional party. Continue to add parties until all of the necessary parties have been added to the case.

18. Click  to save your work and to continue.

Entering Filing Details for a Bulk Filing

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

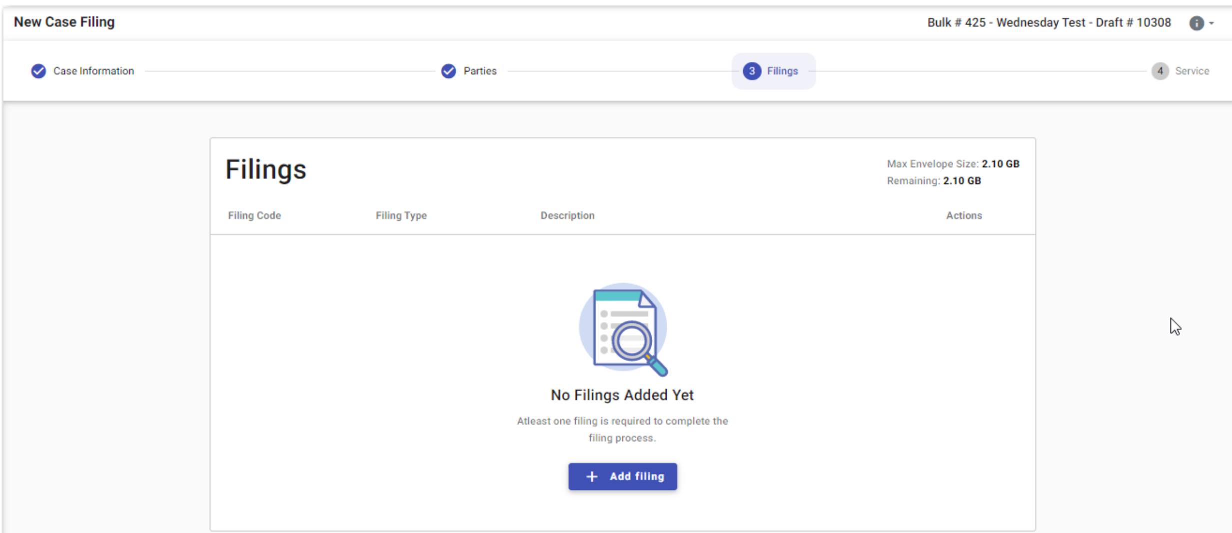


Figure 19.10 – Example of a Filings Page

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

To enter the details for a bulk filing:

1. On the *Filings* page, click .

   The *Edit Filing Details* page is displayed.

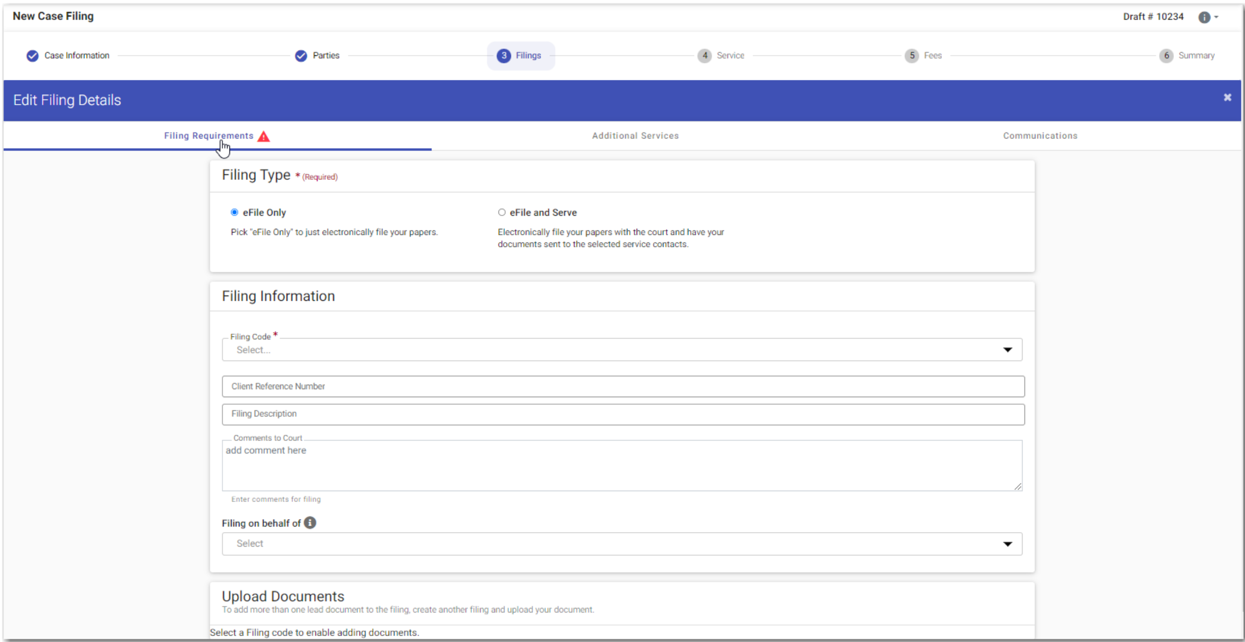
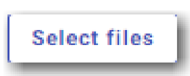


Figure 19.11 – Edit Filing Details Page

2. In the Filing Type pane, select the filing type option.
3. In the Filing Information pane, select the filing code from the **Filing Code** drop-down list.
4. Type a client reference number in the **Client Reference Number** field.
5. Type a description in the **Filing Description** field.
6. If you have any comments for the court regarding the filing, type them in the **Comments to Court** field.
7. In the **Filing on behalf of** section, from the drop-down list, select the parties that you want to associate with the filing.
8. In the Upload Documents pane, click 

. Then, select the document that you want to upload.

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

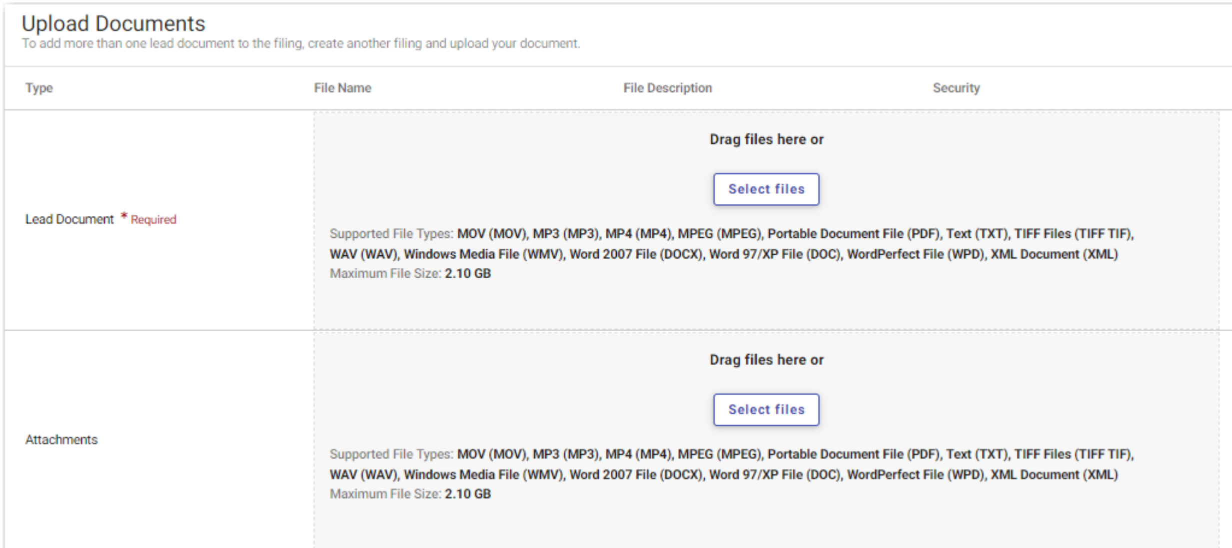


Figure 19.12 – Upload Documents Pane

9. If you have attachments to add to the filing, click 

in the **Attachments** section. Then, upload the specified attachments.
10. If you want to add security to any of the documents, select an option from the **Security** drop-down list.
11. To add additional services, click **Additional Services**.

    The Additional Services pane is displayed.

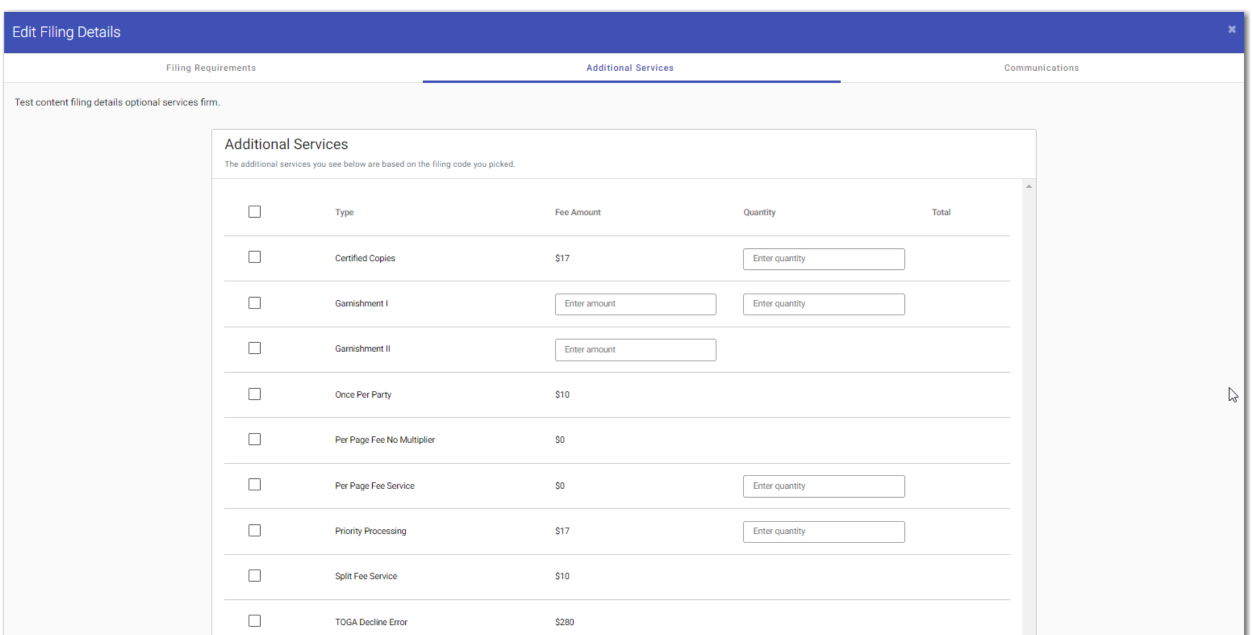
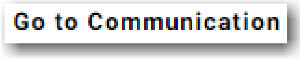


Figure 19.13 – Additional Services Pane on the Edit Filing Details Page

12. Select the additional services that you want to add. Also, if applicable, type the fee amount and/or select the quantity of the specified service.

13. Click 

, or click **Communications** at the top of the page.

The Communications pane is displayed.

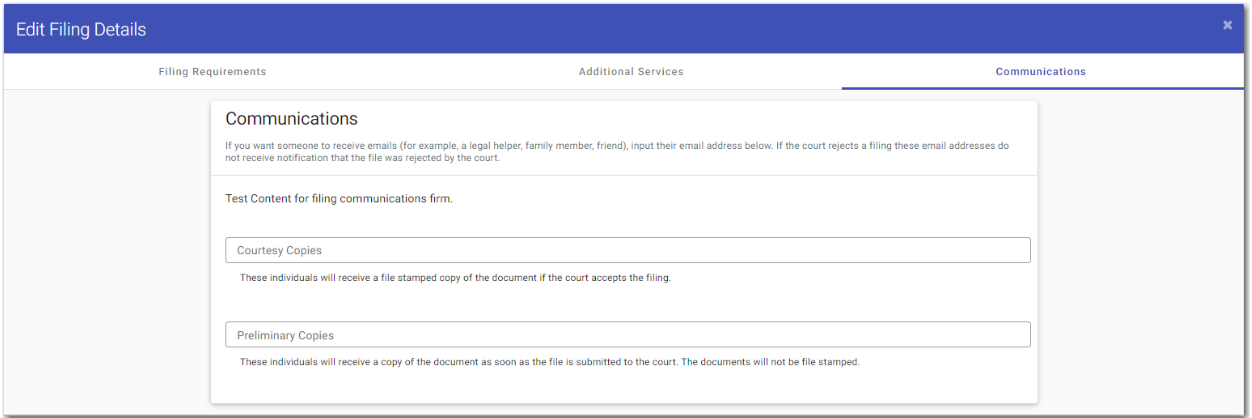


Figure 19.14 – Communications Pane on the Edit Filing Details Page

14. Type a valid email address to specify the recipient of the courtesy or preliminary copies.

15. Click 

.

16. If you want to add another filing, on the *Filings* page, click 

. Then, repeat the same steps for the next filing.

17. Click 

to save your work and to continue.

Entering Payment Information for a Bulk Filing

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

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

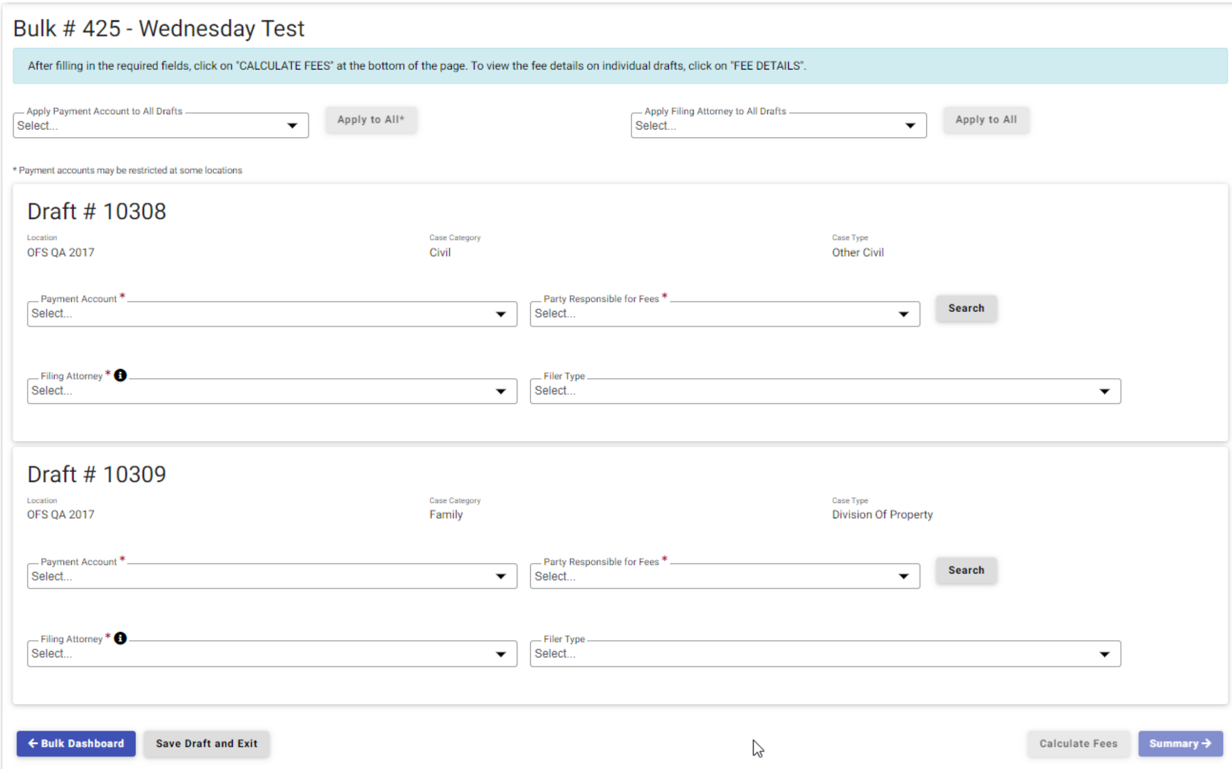
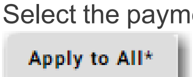


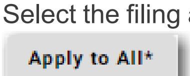
Figure 19.15 – Example of a Bulk Fees Page—Blank Fields

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:

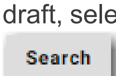
Note: If you do not want to apply the same payment account and filing attorney to all of the drafts in the bulk, you must select the payment account and the filing attorney for each individual draft.

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

to apply the selected payment account to all of the drafts in the bulk.
2. Select the filing attorney from the **Apply Filing Attorney to All Drafts** drop-down list. Then, click 

to apply the selected filing attorney to all of the drafts in the bulk.

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

3. For each draft, select the party responsible for fees from the **Party Responsible for Fees** drop-down list. Click 

if you want to search for a party.

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

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

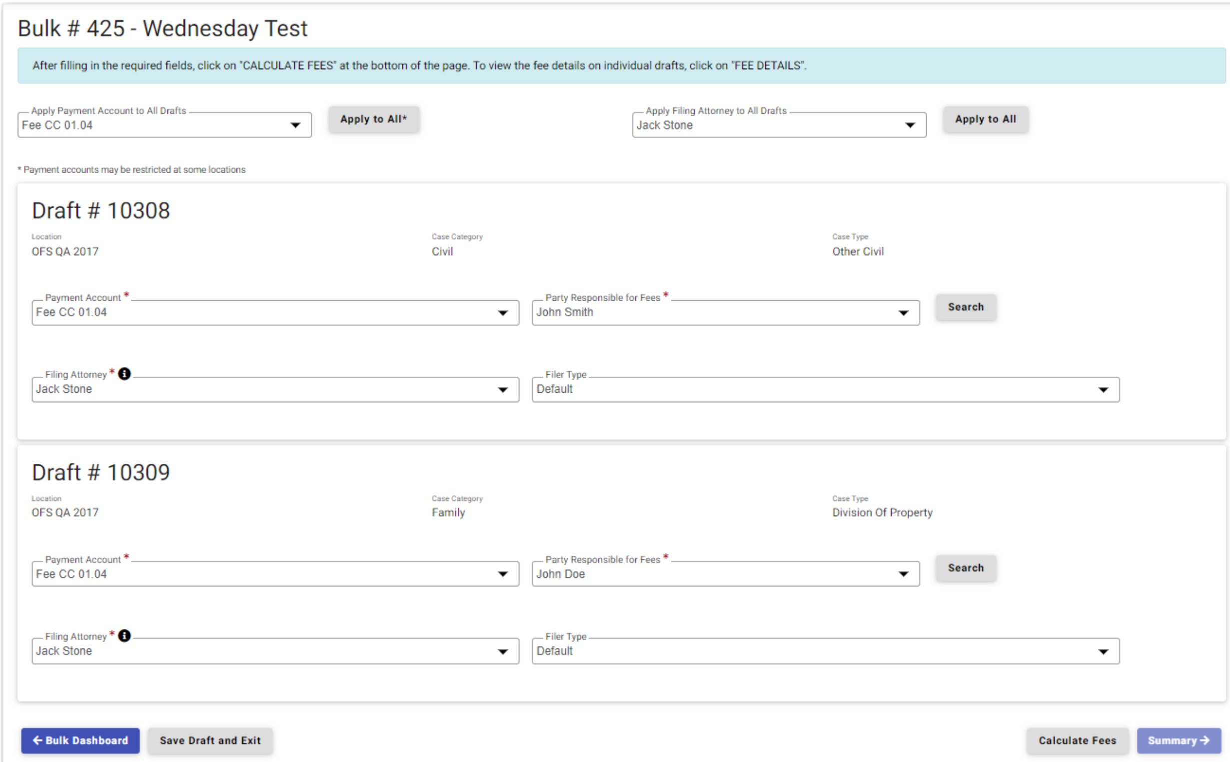


Figure 19.16 – Example of a Bulk Fees Page—Completed Fields

5. When all of the fields on the page have been completed, click **Calculate Fees**.

   The **Fee Details** button is displayed.

6. Click **Fee Details**.

   The *Fee Details* window is displayed.

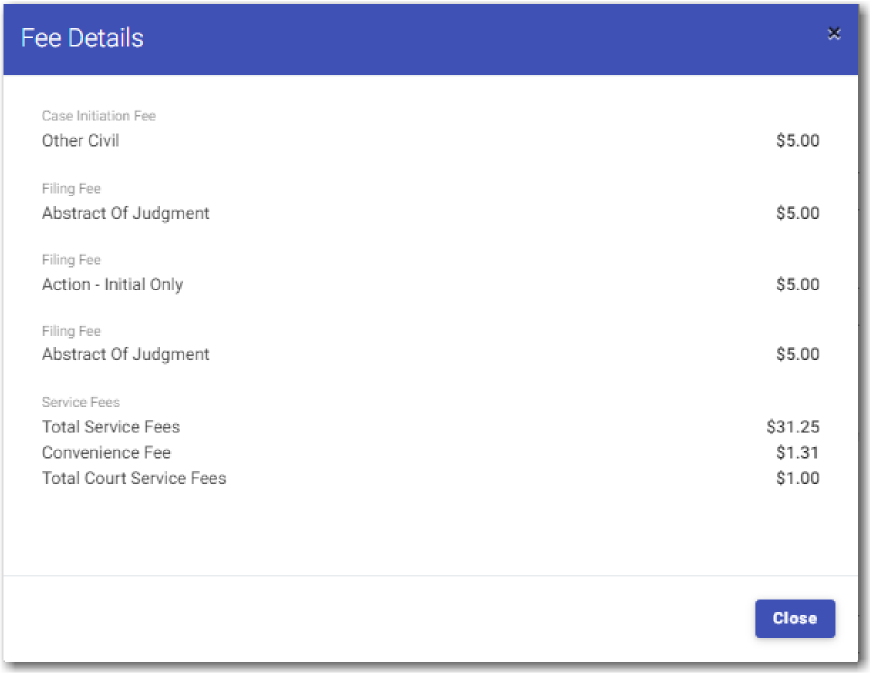


Figure 19.17 – Example of a Fee Details Window

7. Review the filing fees, and then click 

.

Viewing the Envelope Summary for a Bulk Filing

The envelope summary for a bulk filing 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* page, the *Parties* page, the *Filings* page, and the *Bulk Fees* page.
2. After you have completed the fields on each page, from the *Bulk Fees* page, click 

.

   The *Bulk Summary* page is displayed.

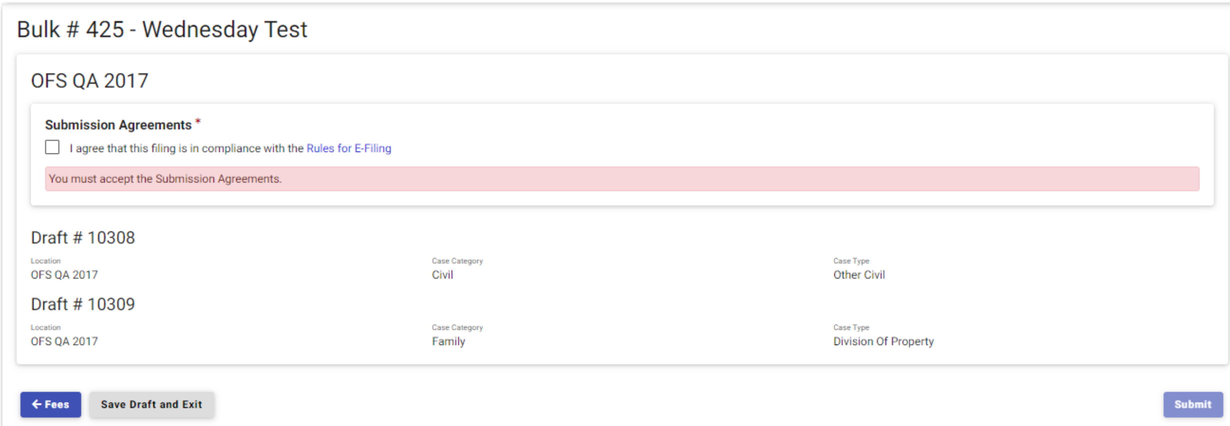


Figure 19.18 – Example of a Bulk Summary Page—Submission Agreements Not Accepted

3. If there are submission agreements for your bulk 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 bulk filing, click **Submit**.

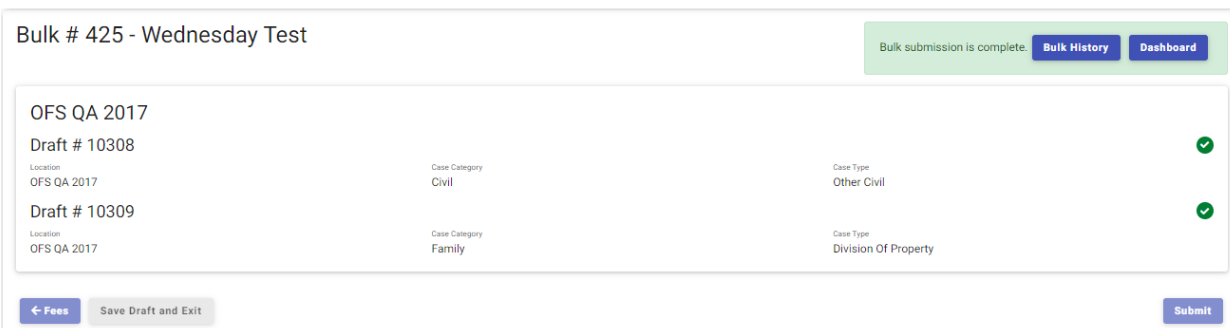


Figure 19.19 – Example of a Bulk Summary Page After Filing is Submitted

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

Associating Parties to a Bulk Filing

You can associate parties to a bulk filing.

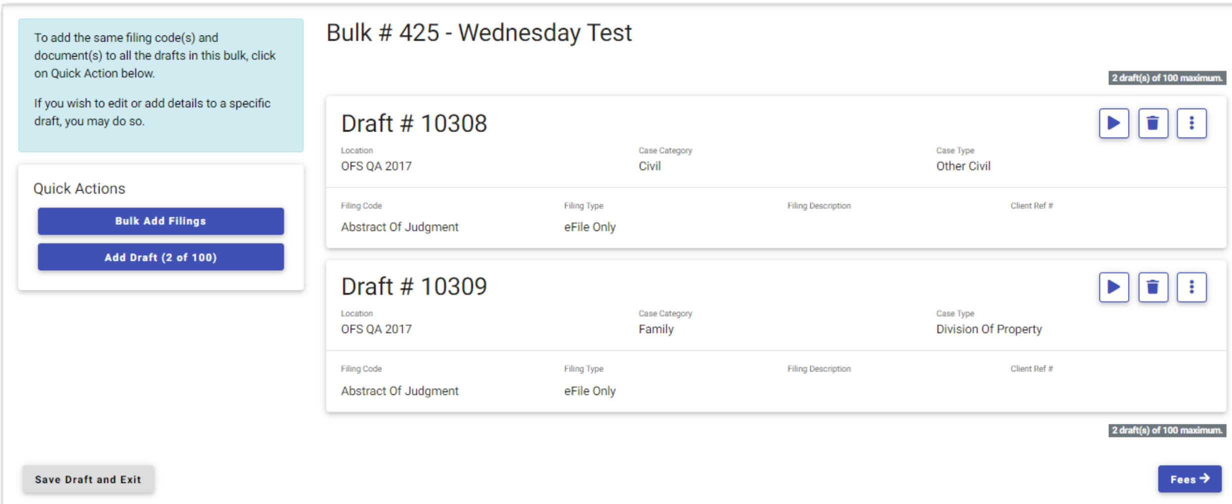


Figure 19.20 – Example of a Bulk Filing Dashboard Page

To associate parties to a bulk filing:

1. On the *Bulk Filing Dashboard* page in the Quick Actions pane, click 

.

   The *Bulk Add Filings* page is displayed.

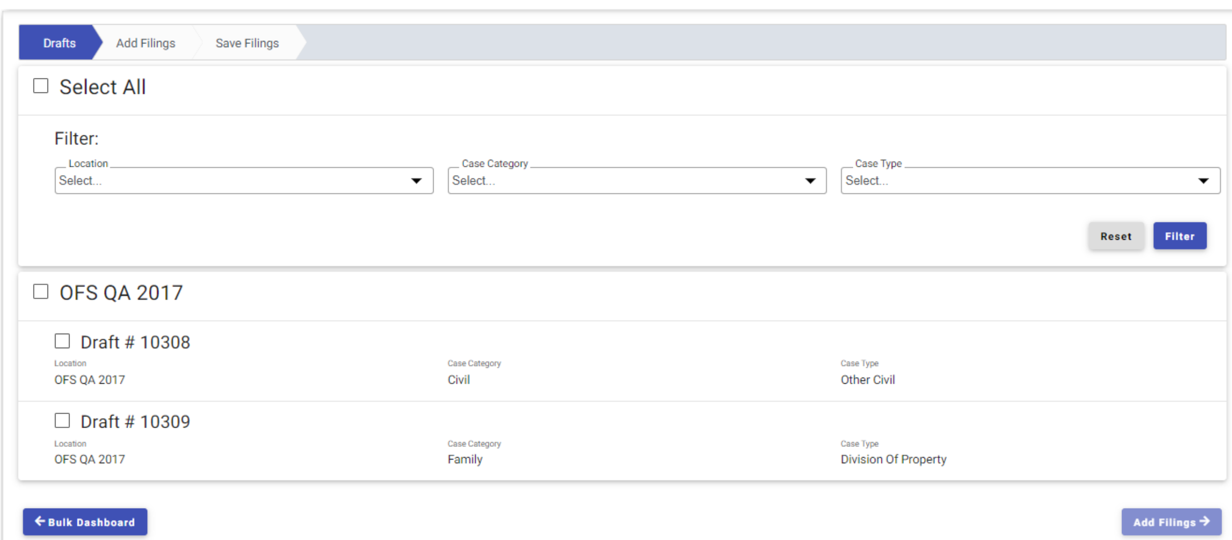


Figure 19.21 – Example of a Drafts Tab

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 your selected drafts. If you want to add all of the filings, select the **Select All** check box.

4. Click 

.

   The **Add Filings** tab is displayed.

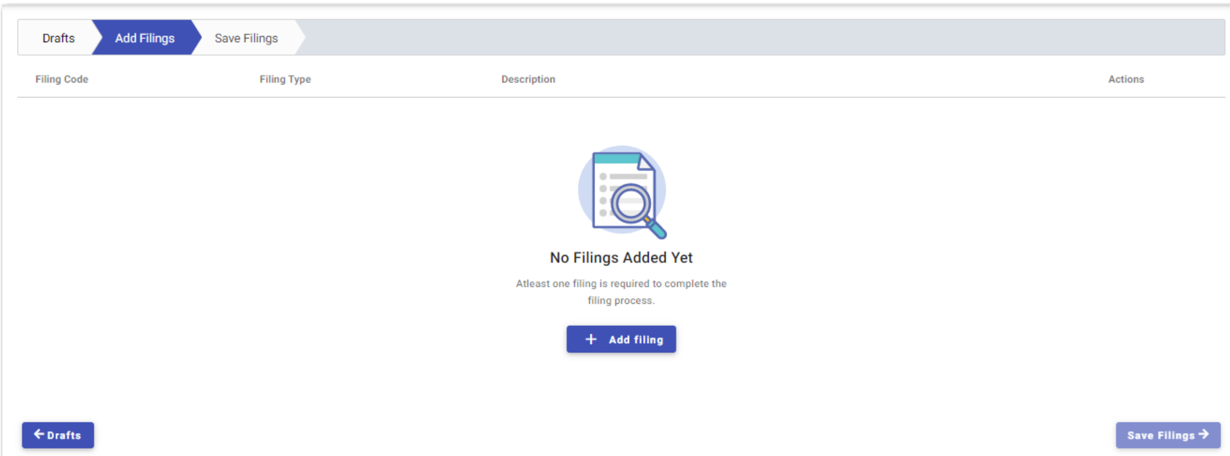


Figure 19.22 – Example of an Add Filings Tab—No Filings Added Yet

5. Click 

.

   The next page is displayed.

6. Click 

. Continue to click the button until all of the filings have been added.

7. Click 

.

   The **Save Filings** tab is displayed.

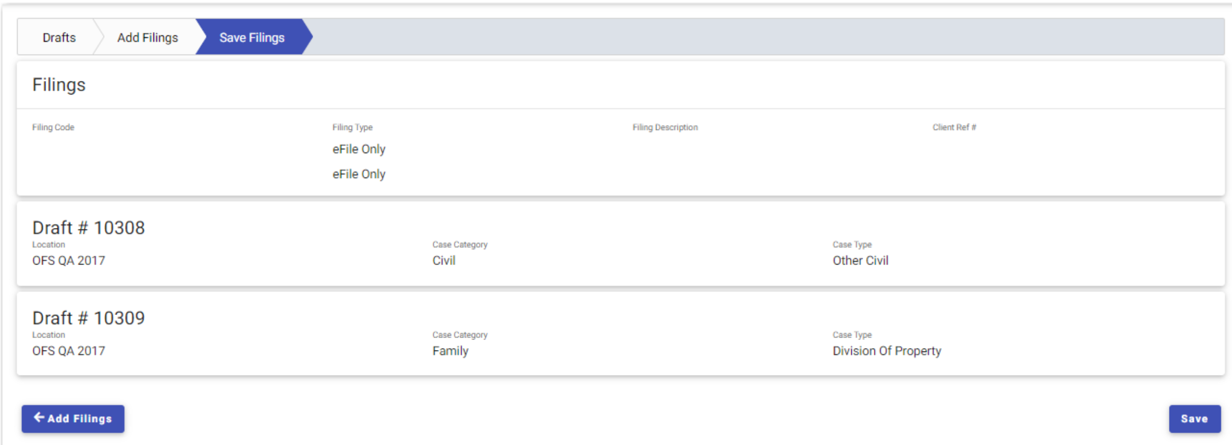


Figure 19.23 – Example of a Save Filings Tab

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

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

9. Click **Associate Parties**.

   The *Select Filings* window is displayed.

10. Select the check boxes for the filing codes that you want to add, or click Select All. Then, click **Select**.

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

11. 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 Filter.

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

13. Click Save, and then click Done.

    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 a Bulk Filing That Contains 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 a bulk filing that already contains multiple existing cases:

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

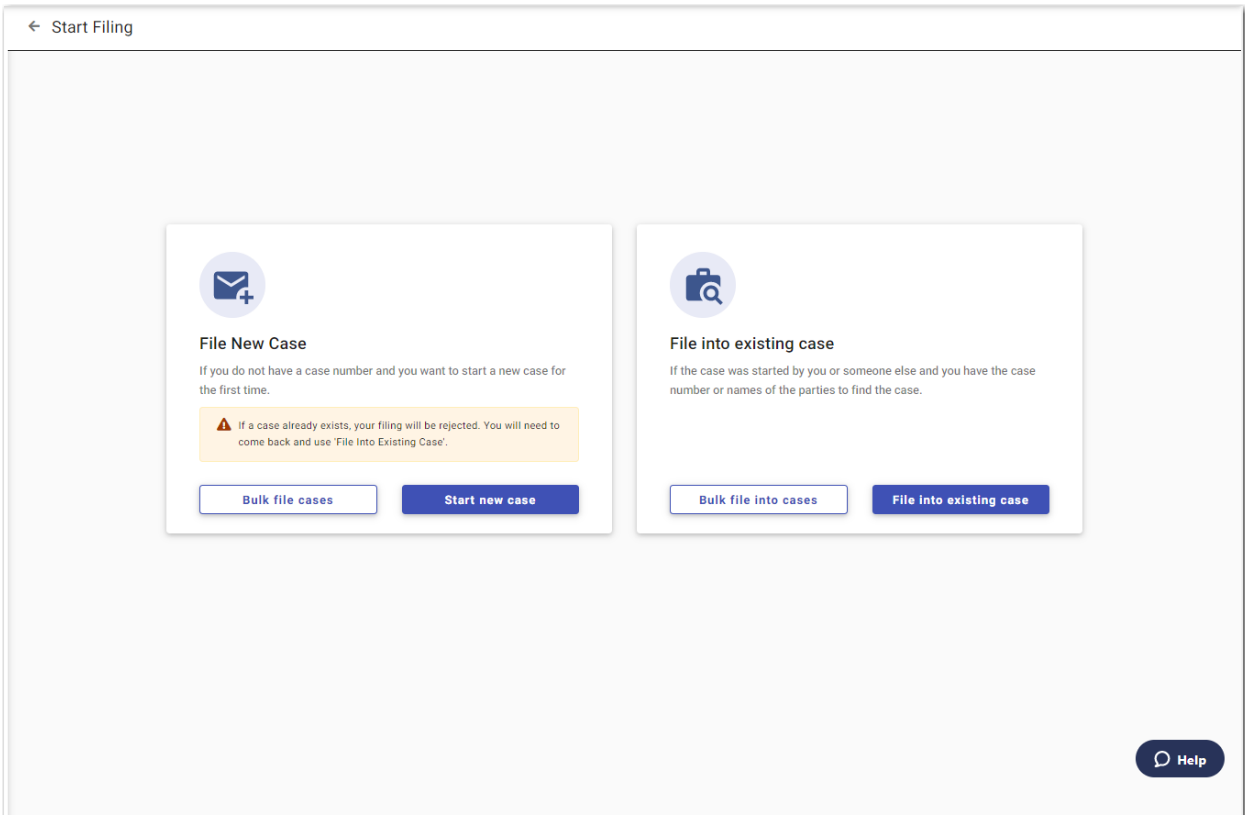


Figure 19.24 – Start Filing Page

2. Click 

.

   The *Bulk Filing* window is displayed.

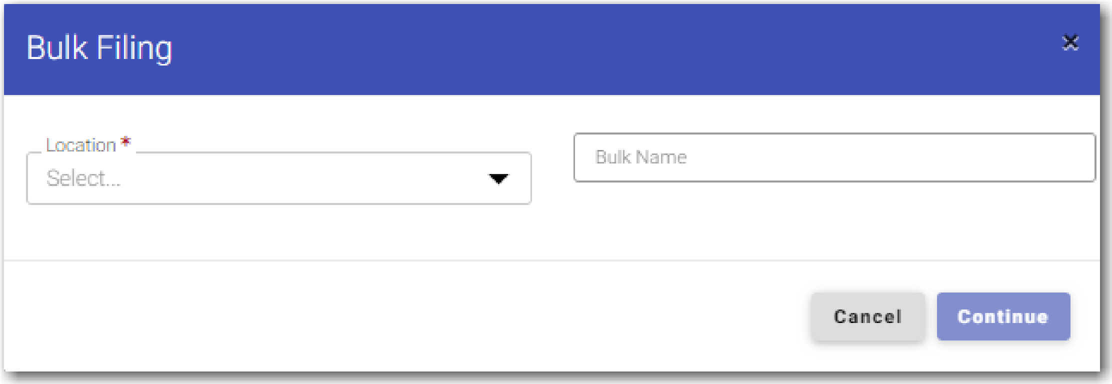


Figure 19.25 – Bulk Filing Window

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

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

   The *Bulk Filing Dashboard* page is displayed.

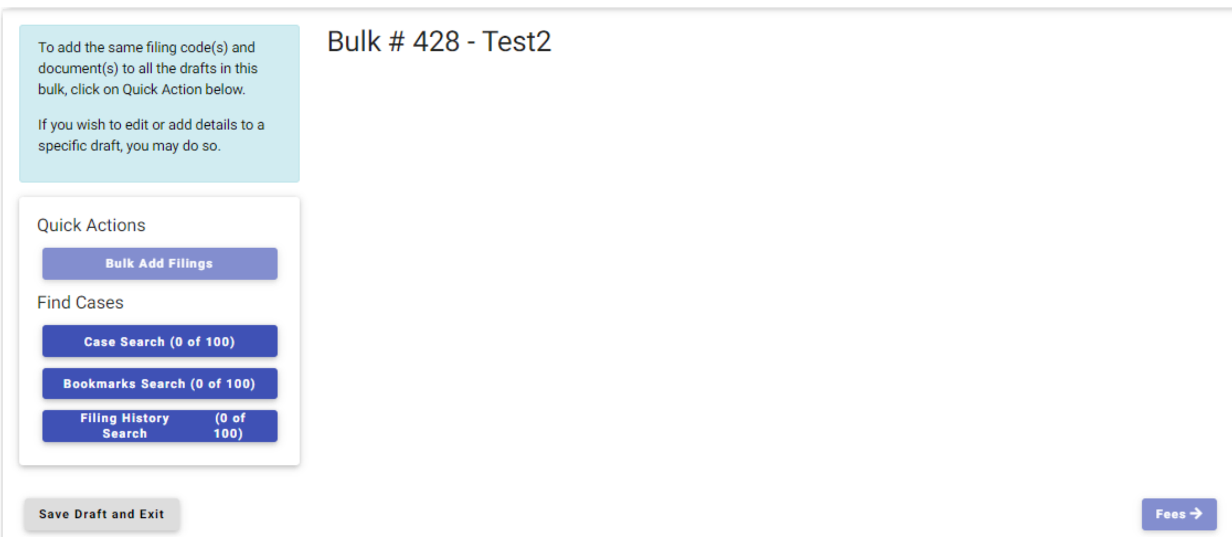


Figure 19.26 – Example of a Bulk Filing Dashboard Page

5. In the Quick Actions pane, select the method by which you want to search for the cases that you want to add to your bulk filing—**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 by 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 by using the Bookmark search:

1. On the *Dashboard* page, click .

   The *Start Filing* page is displayed.

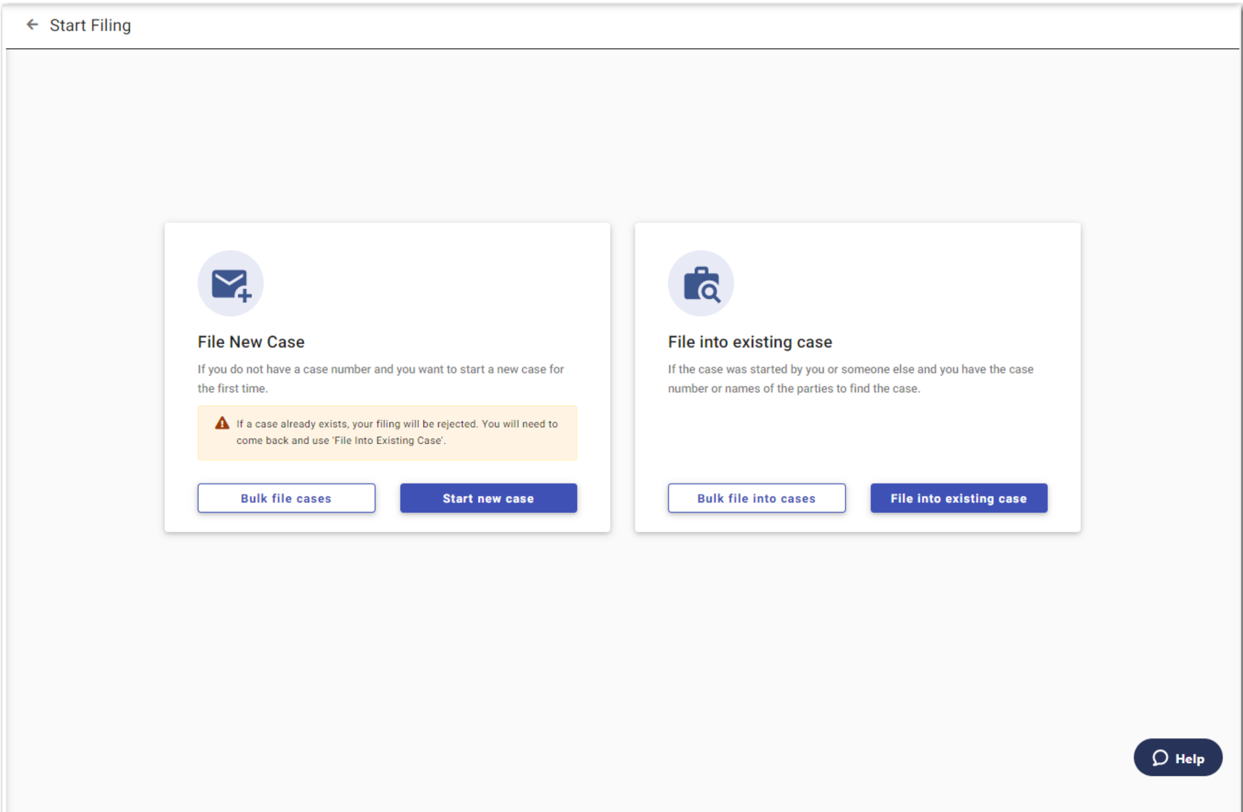


Figure 19.27 – Start Filing Page

2. Click .

   The *Bulk Filing* window is displayed.

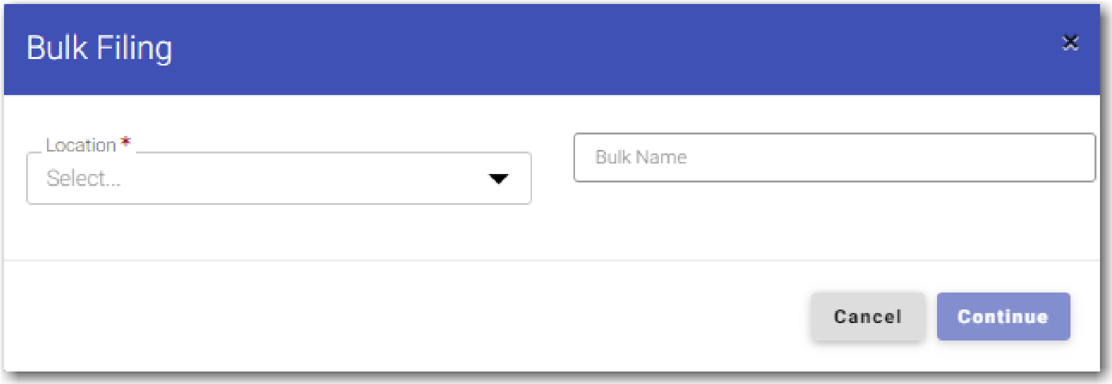


Figure 19.28 – Bulk Filing Window

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

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

.

   The *Bulk Filing Dashboard* page is displayed.

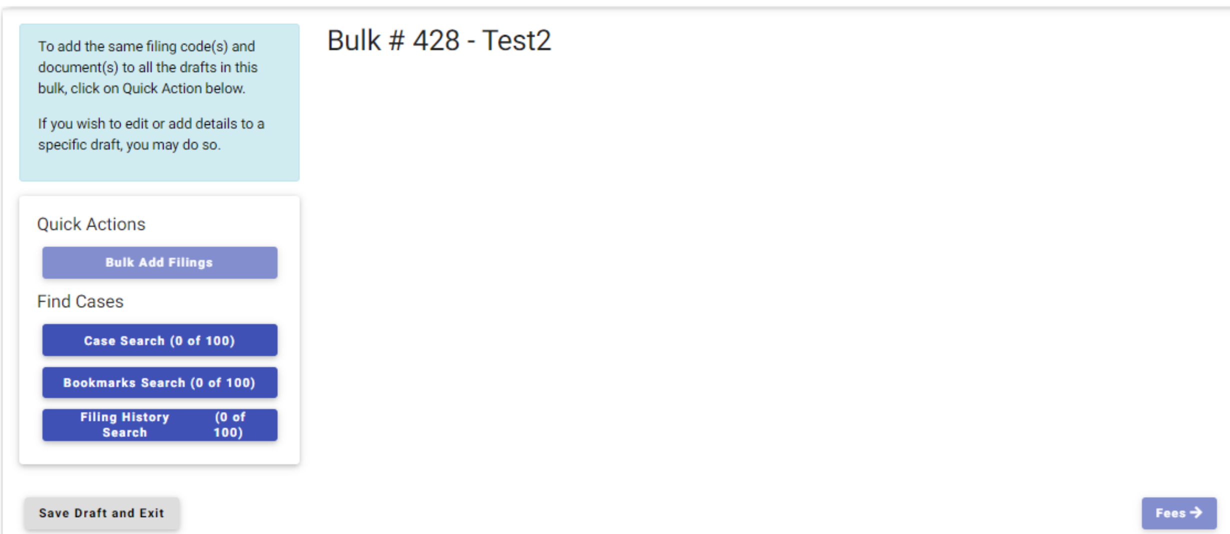


Figure 19.29 – Example of a Bulk Filing Dashboard Page

5. In the Quick Actions pane, click 

.

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

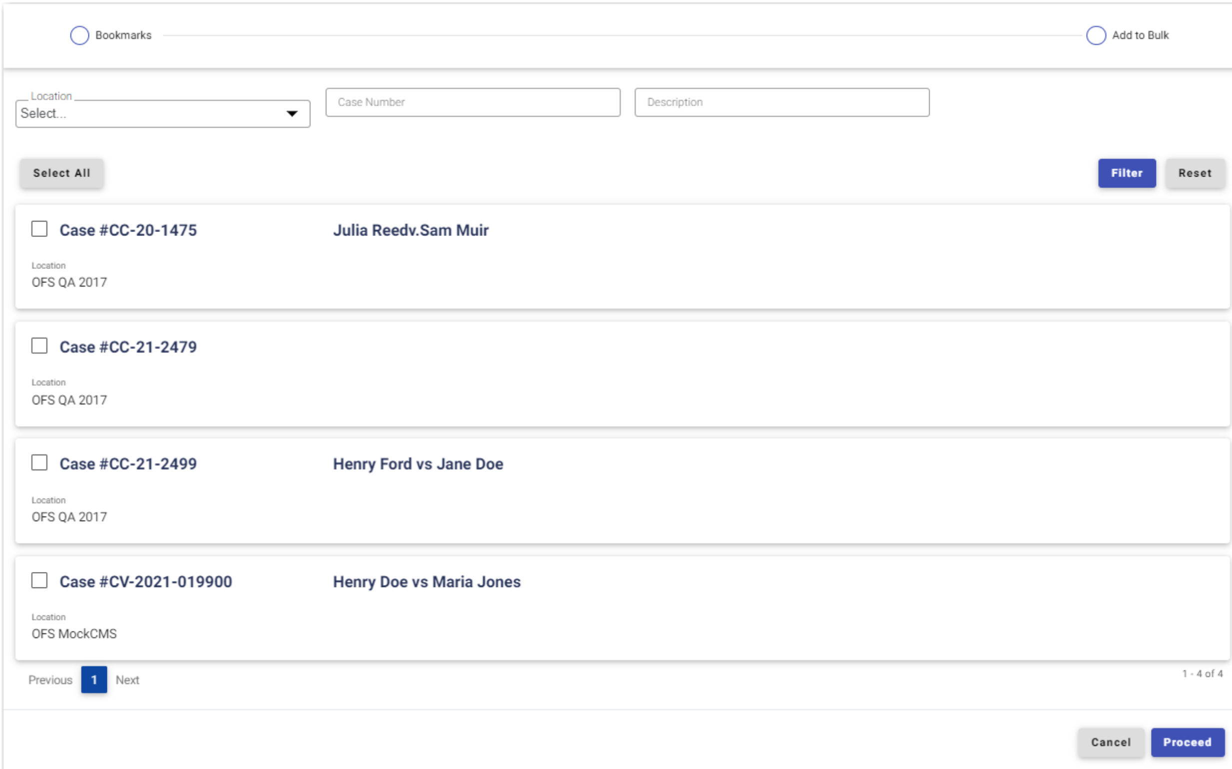


Figure 19.30 – Example of a Bookmarks Window

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

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

   The *Add to Bulk* window is displayed.

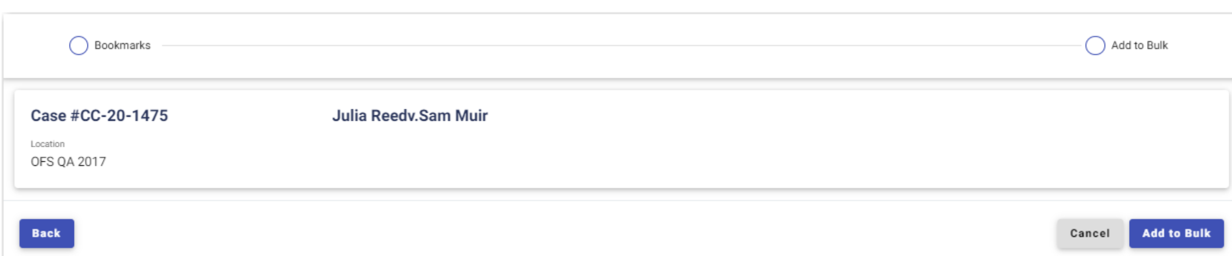


Figure 19.31 – Add to Bulk Window

7. Click **Add to Bulk**, and then click **Done**.

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

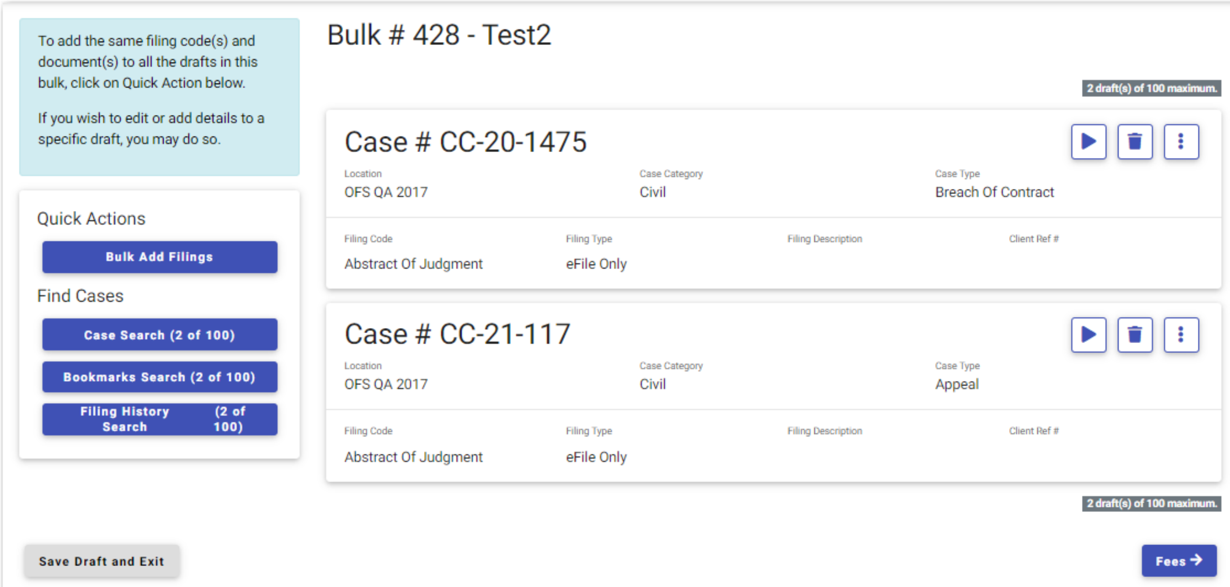


Figure 19.32 – Example of a Bulk Filing Dashboard Page—Case Added to Bulk Filing

Filing into Multiple Existing Cases by Using a Case Search

You can file into a bulk filing that already contains multiple existing cases from the *Case Search* page.

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

To file into multiple existing cases by using a case search:

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

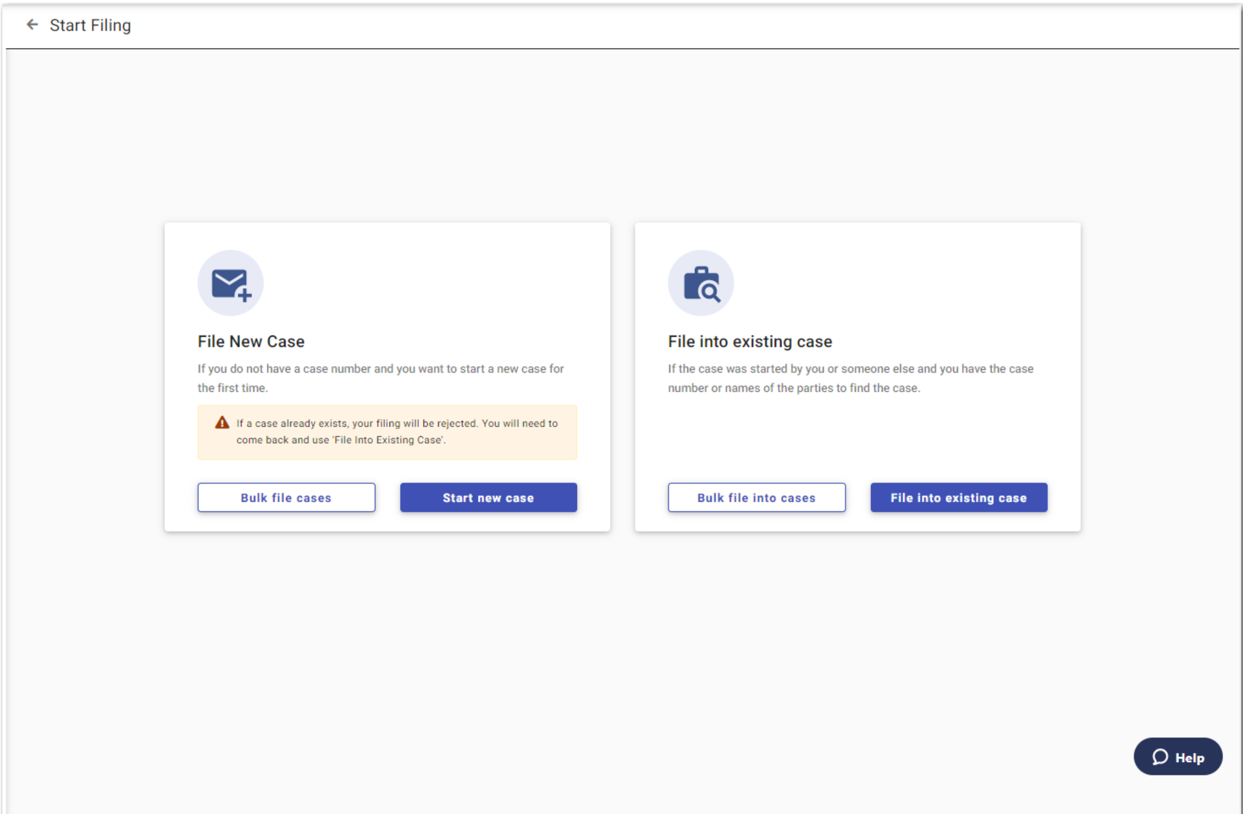


Figure 19.33 – Start Filing Page

2. Click 

.

   The *Bulk Filing* window is displayed.

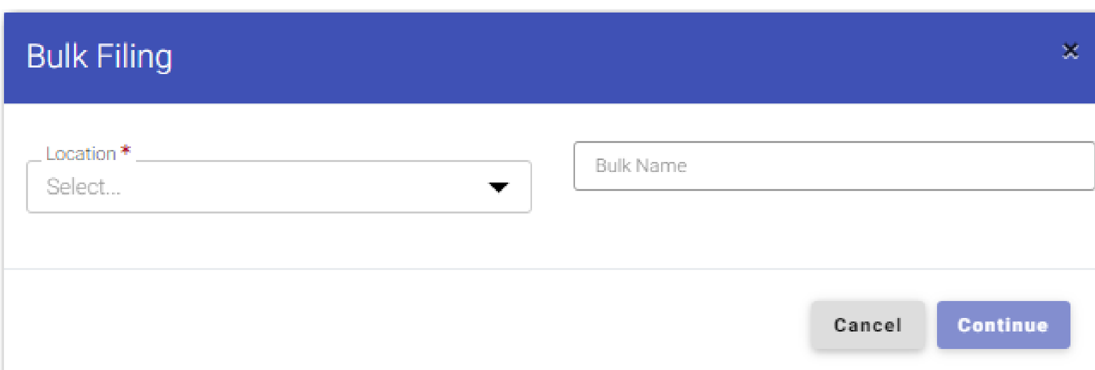


Figure 19.34 – Bulk Filing Window

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

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

.

   The *Bulk Filing Dashboard* page is displayed.

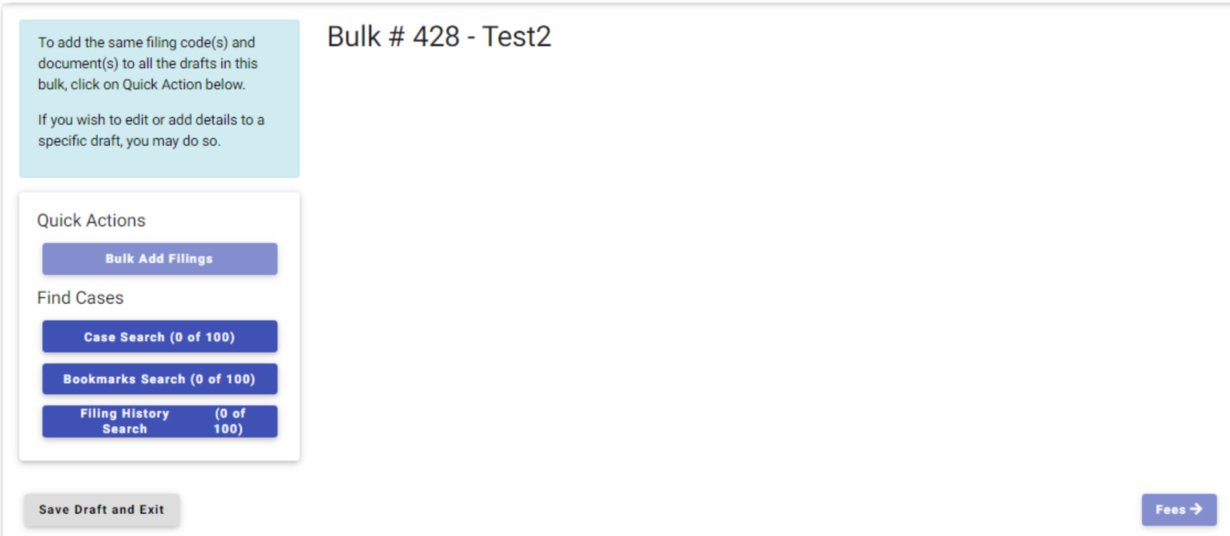


Figure 19.35 – Example of a Bulk Filing Dashboard Page

5. In the Quick Actions pane, click **Case Search (0 of 100)**.

   The *Case Search* window is displayed.

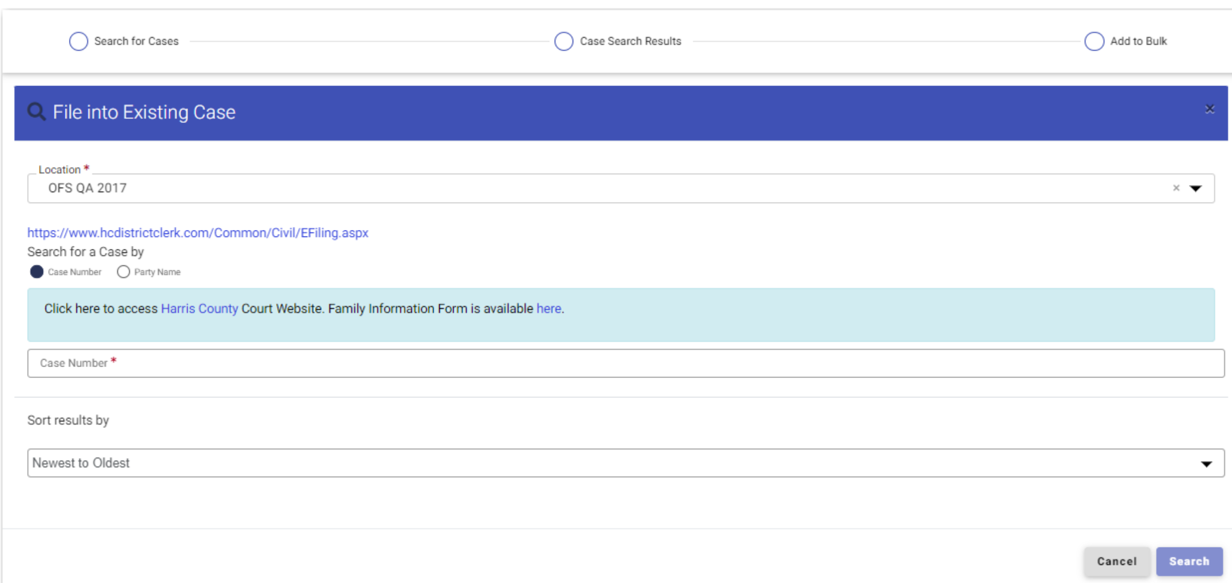


Figure 19.36 – Case Search Window

6. Select the location of the case that you want to find from the **Location** drop-down list.

7. Type the number for the case that you want to find, and then click **Search** or press ENTER.

   The *Case Search Results* window is displayed.

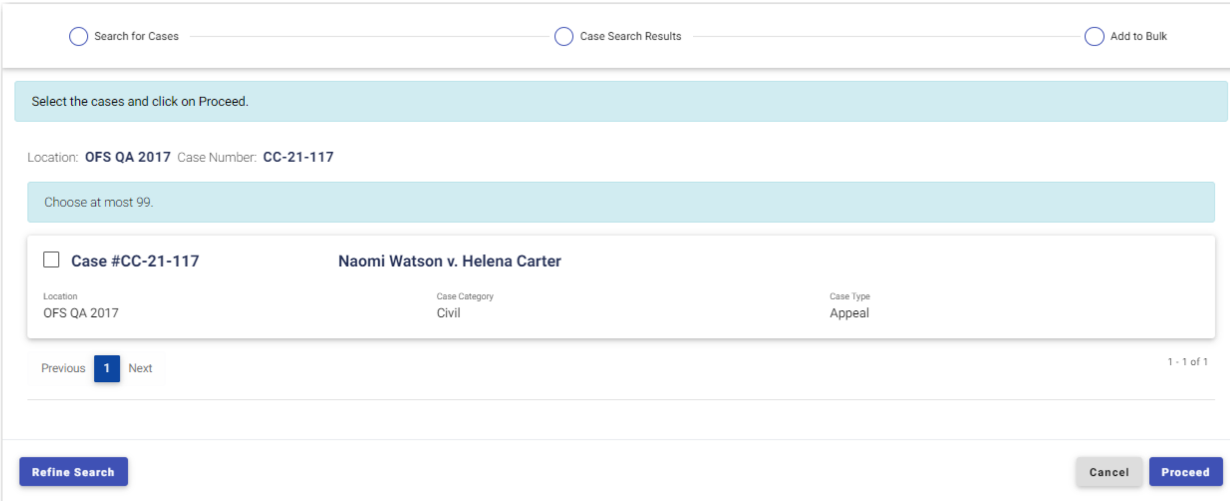


Figure 19.37 – Case Search Results Window

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

.

   The *Add to Bulk* window is displayed.

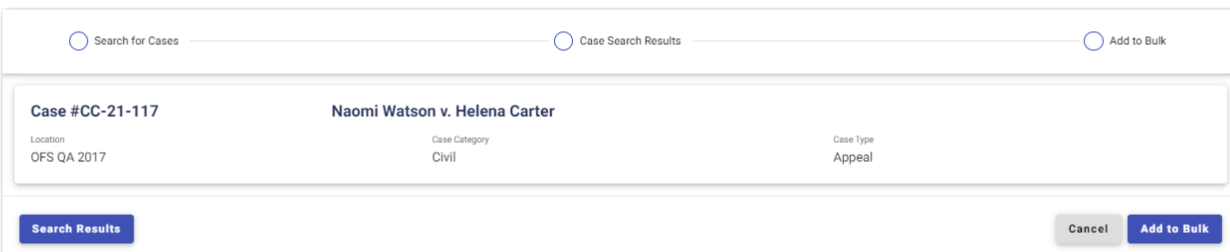


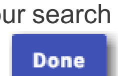
Figure 19.38 – Add to Bulk Window

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.

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

, and then click 

.

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

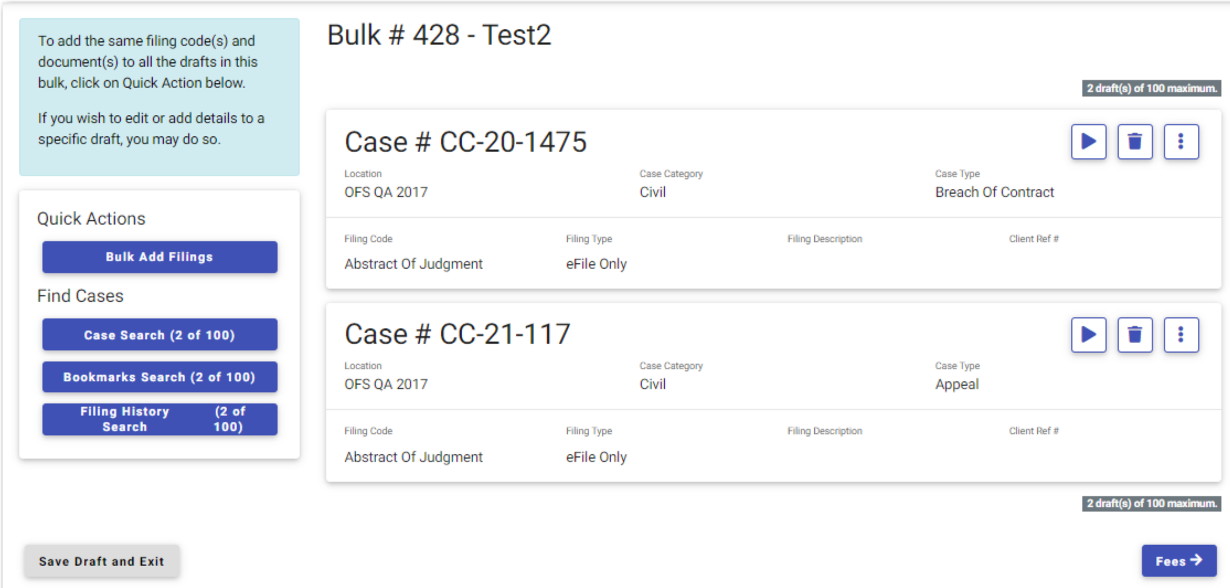


Figure 19.39 – Example of a Bulk Filing Dashboard Page—Case Added to Bulk Filing

Filing into Multiple Existing Cases by Using a Filing History Search

You can file into a bulk filing by using a 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 by using a Filing History search:

1. On the *Dashboard* page, click 

.

   The *Start Filing* page is displayed.

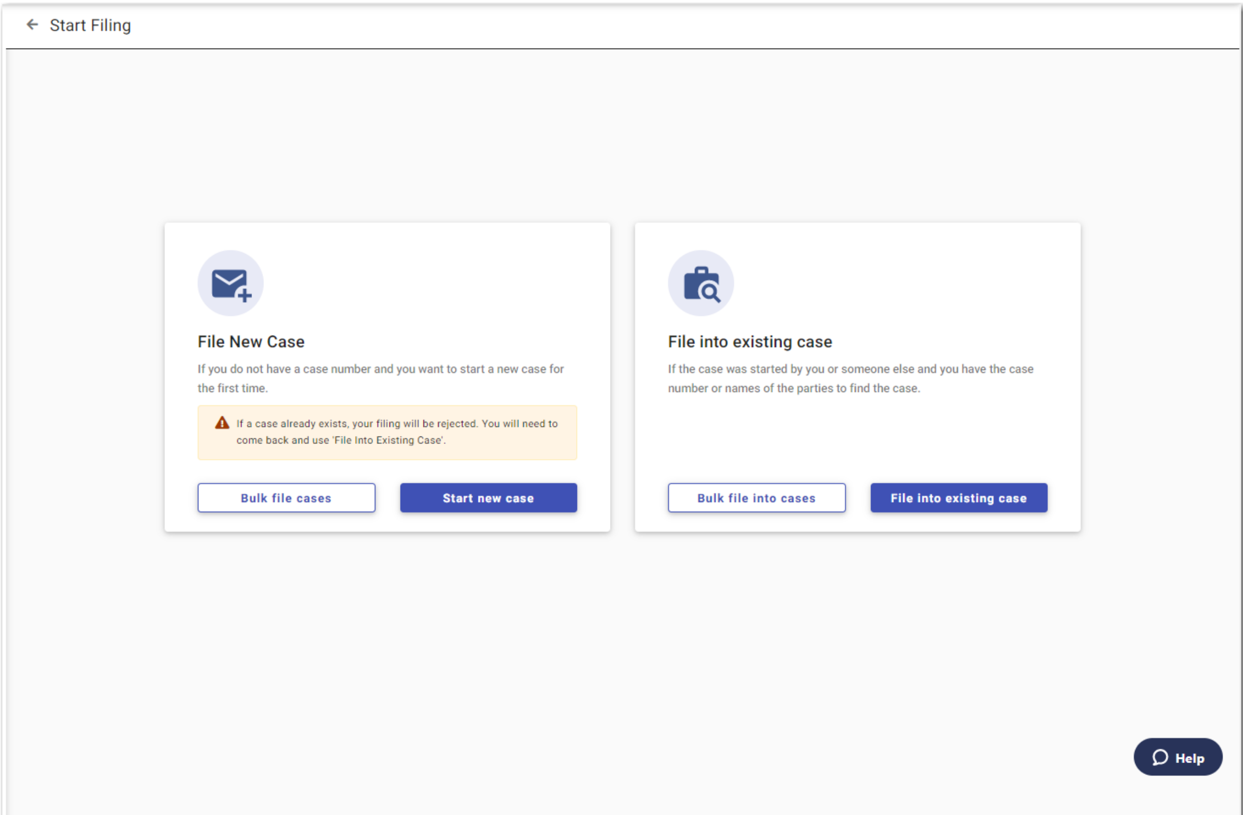


Figure 19.40 – Start Filing Page

2. Click 

.

   The *Bulk Filing* window is displayed.

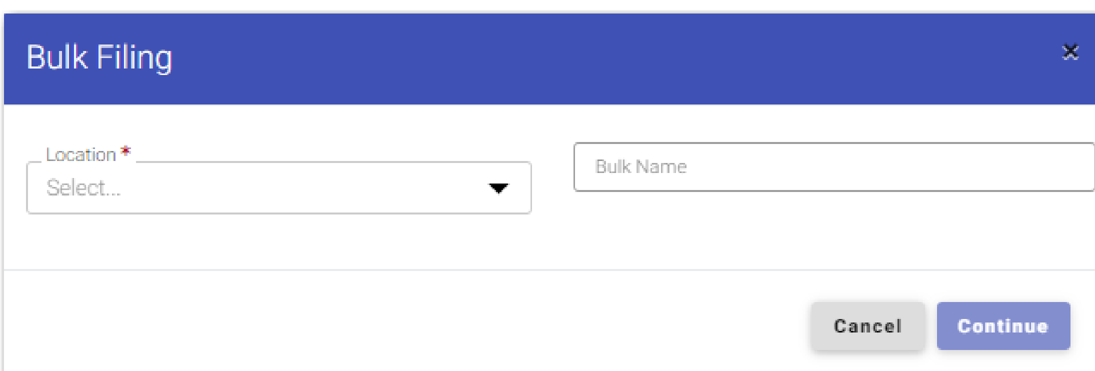


Figure 19.41 – Bulk Filing Window

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

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

.

   The *Bulk Filing Dashboard* page is displayed.

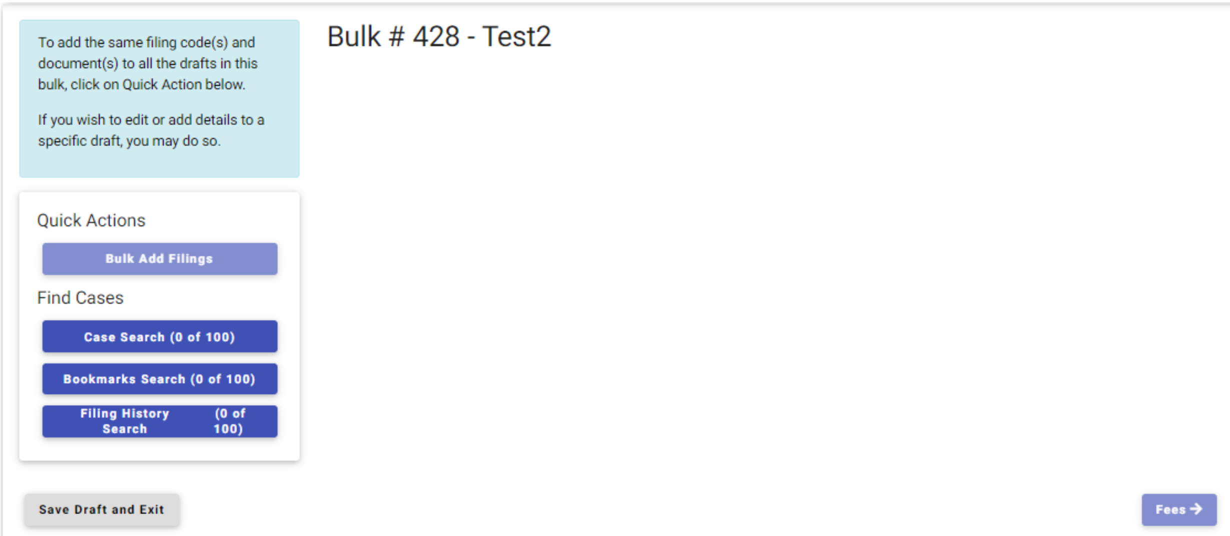


Figure 19.42 – Example of a Bulk Filing Dashboard Page

5. In the Quick Actions pane, click 

.

   The *Filing History* window is displayed.

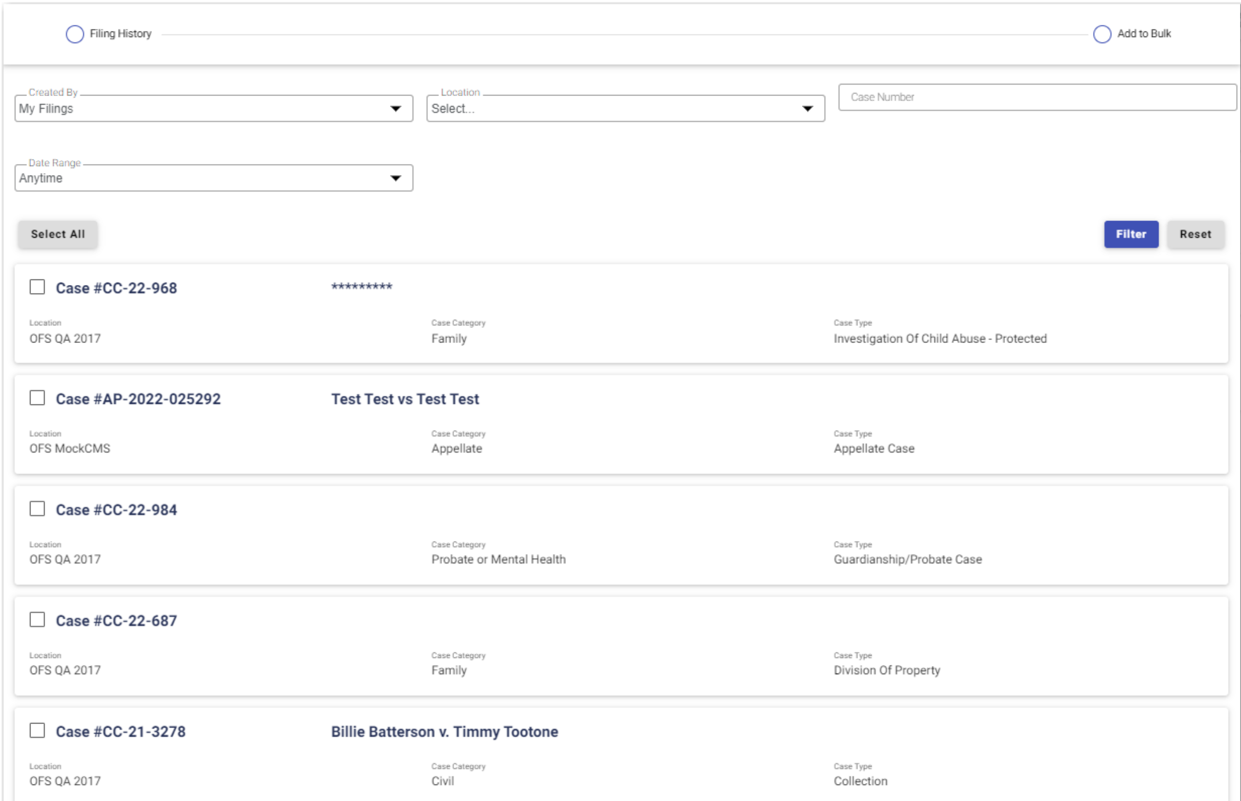


Figure 19.43 – Example of a Filing History Window

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

   The *Add to Bulk* window is displayed.

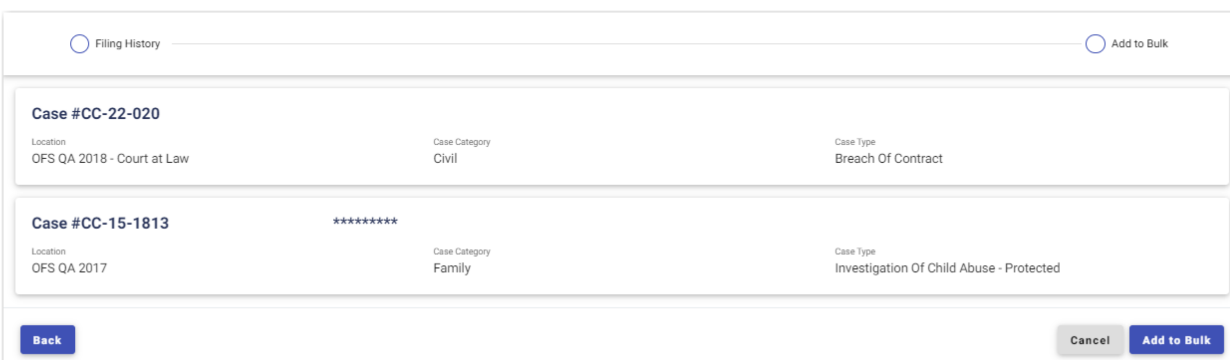


Figure 19.44 – Add to Bulk Window

Note: If your bulk filing is not displayed in the *Filing History* window, you can search for the bulk filing that you want. First, select the filings that you want to be displayed (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 that you want to be displayed. Then, click Filter.

7. Click **Add to Bulk**, and then click **Done**.

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

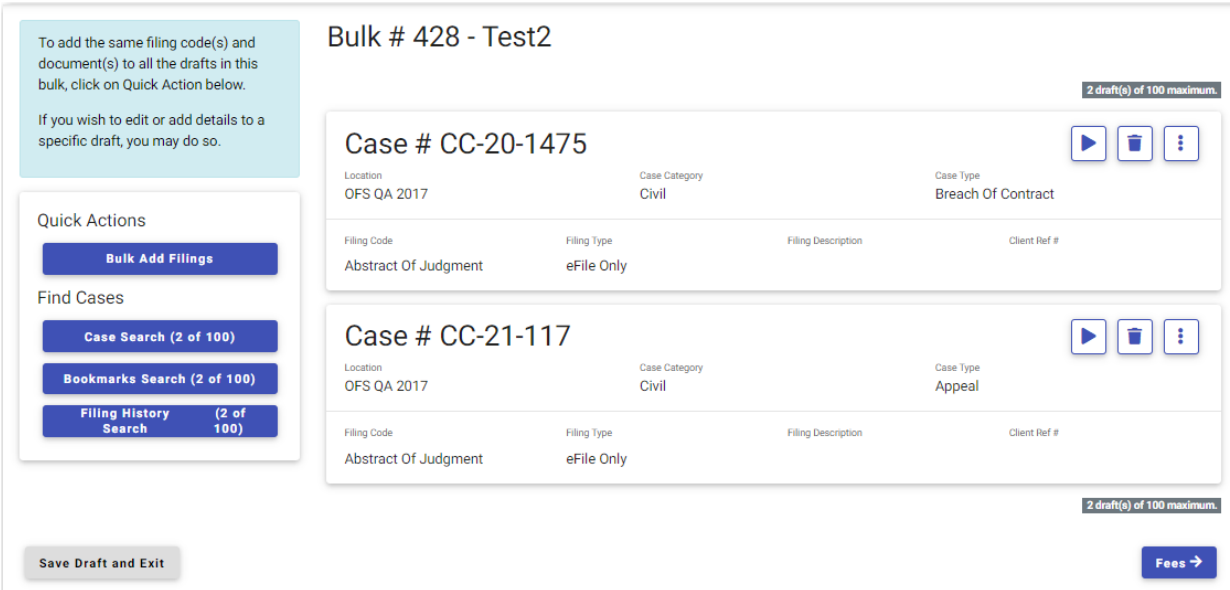


Figure 19.45 – Example of a Bulk Filing Dashboard Page—Case Added to Bulk Filing

Copying a Bulk Filing

You can copy a bulk filing if one or more envelopes in the bulk filing failed to be submitted successfully.

To copy a bulk filing:

1. Navigate to the *Bulk History* page or the *Bulk Drafts* page.
2. Locate the bulk filing that you want to copy.

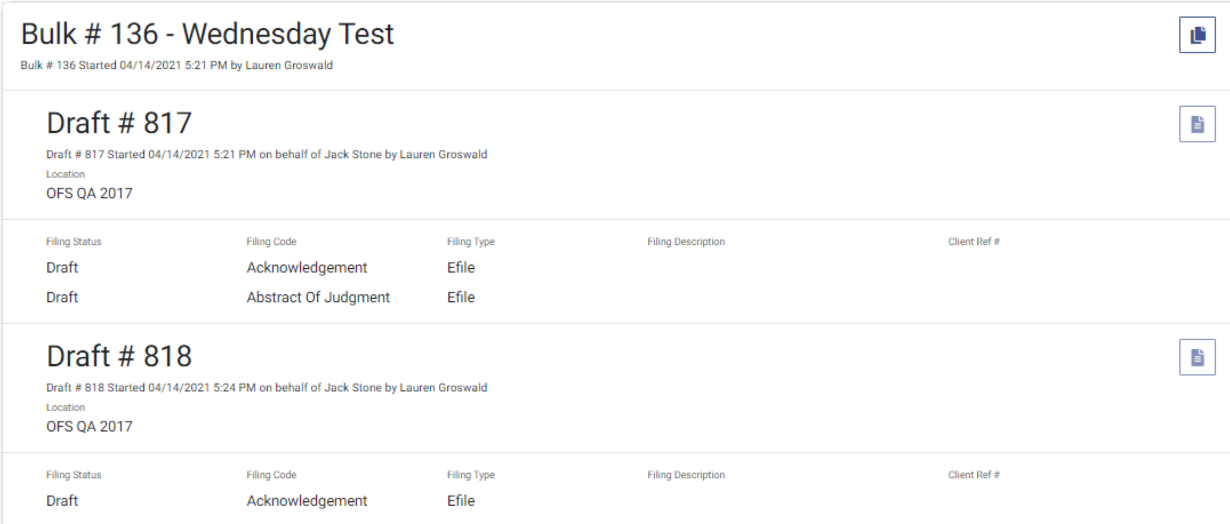


Figure 19.46 – Example of a Bulk Filing Pane

3. Click  .

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

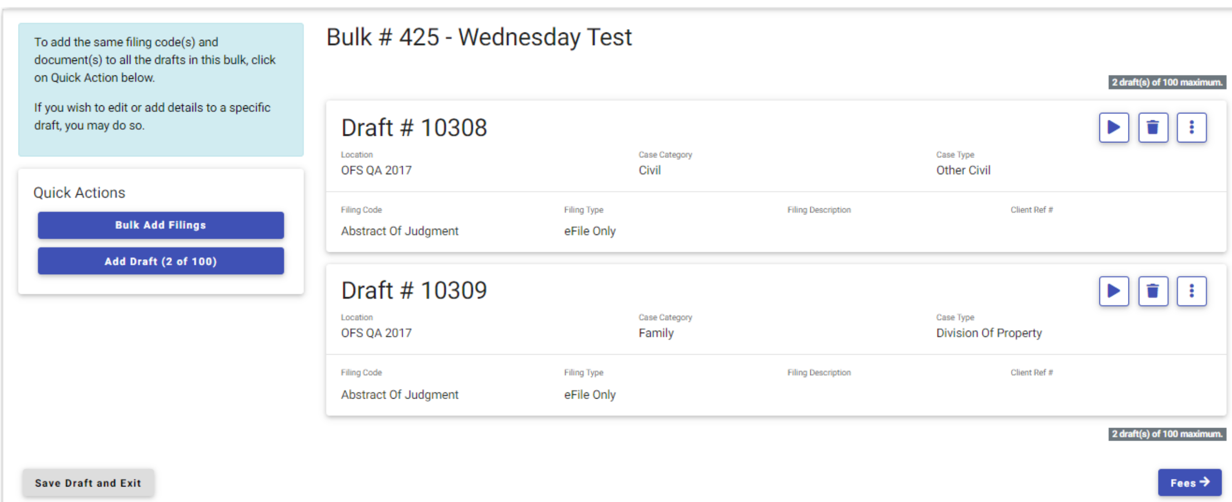


Figure 19.47 – Example of a Bulk Filing Dashboard

4. Continue with your filing.

20 Vacation Letter (or Leave of Absence)

Topics covered in this chapter

You can create a filing in which you upload a vacation letter (or leave of absence). The letter can be attached to all of the 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 list for Firm Administrator actions.

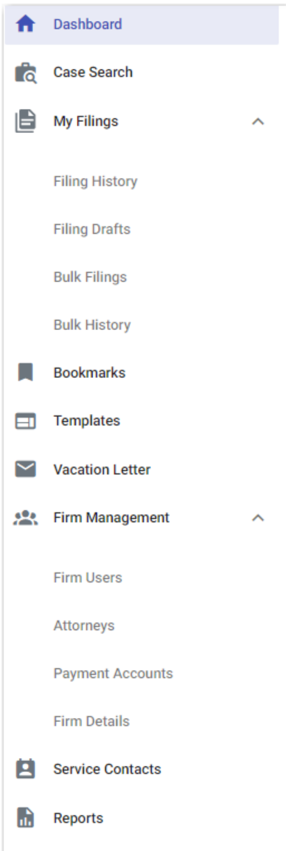


Figure 20.1 – Dashboard

From the Dashboard, you can perform the following additional actions for vacation letter:

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

For information regarding the other options displayed on the Dashboard, refer to Dashboard, page 33.

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.

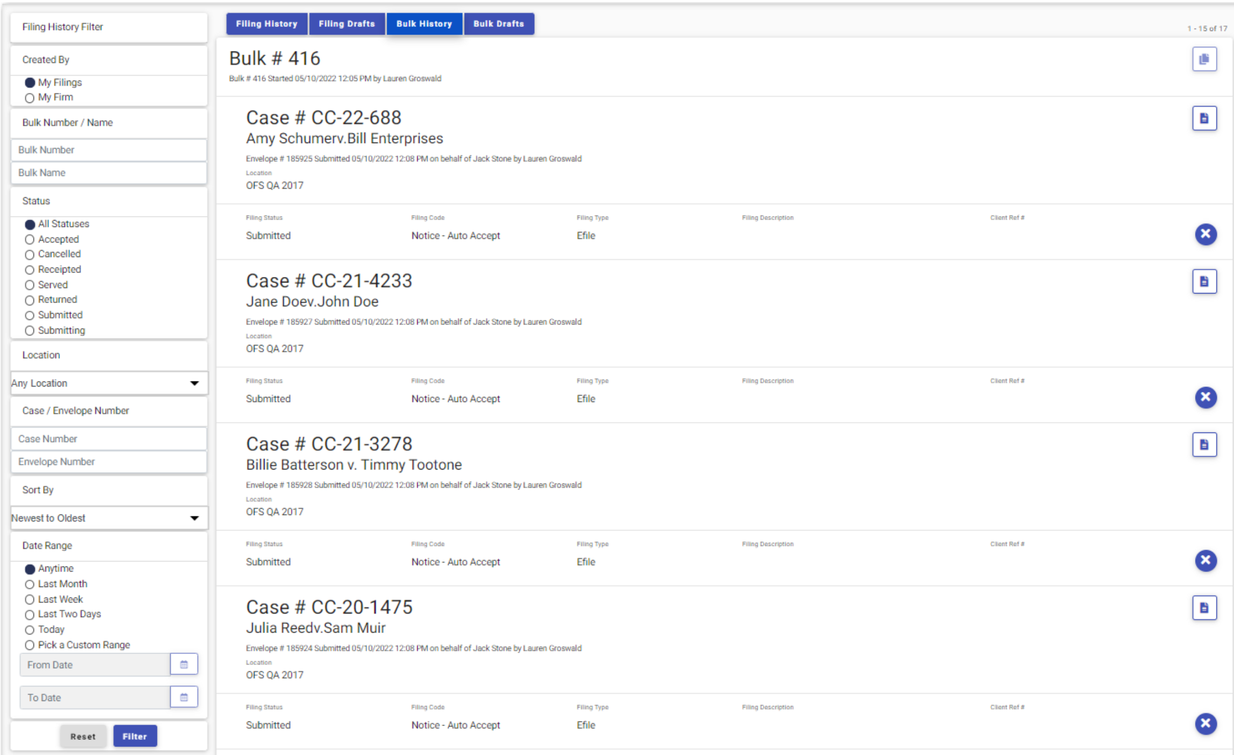


Figure 20.2 – Example of a Bulk History Page

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.

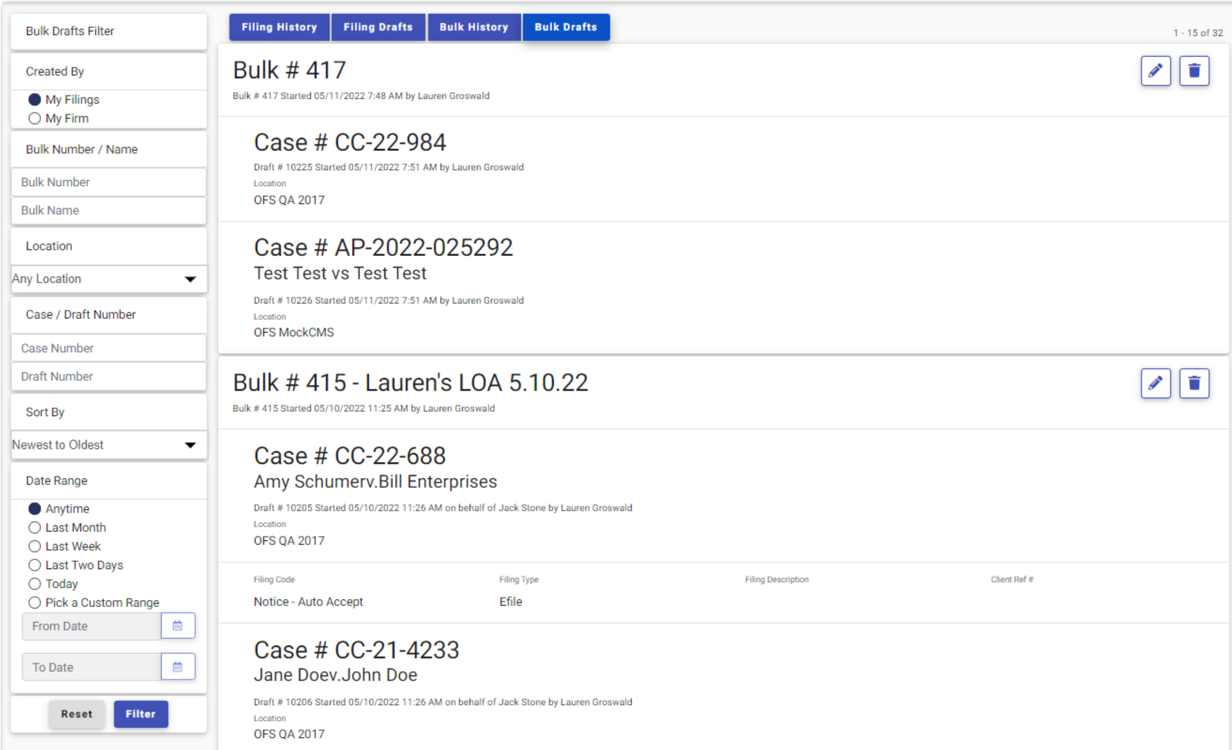


Figure 20.3 – Example of a Bulk Drafts Page

Filing a Vacation Letter (or Leave of Absence)

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

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.

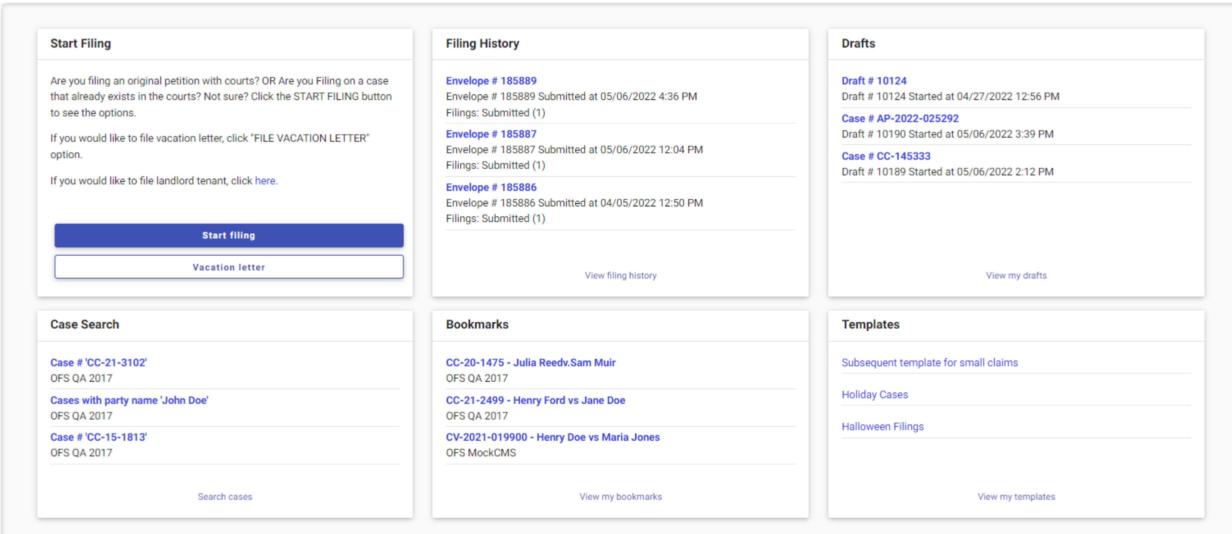


Figure 20.4 – Dashboard Page

To file a vacation letter:

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

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

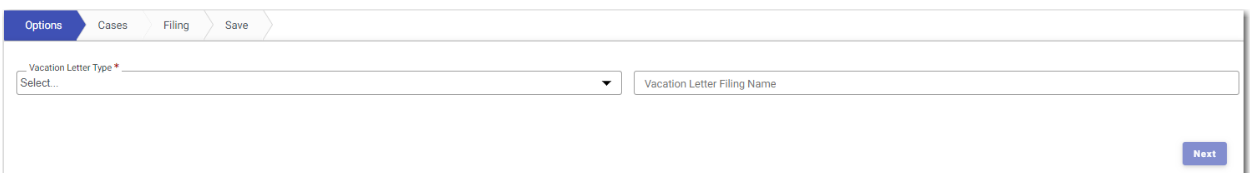


Figure 20.5 – Options Tab on the File Vacation Letter Page

2. From the **Vacation Letter Type** drop-down list, select the vacation letter type that you want.
3. Type a name for the vacation letter filing in the **Vacation Letter Filing Name** field.

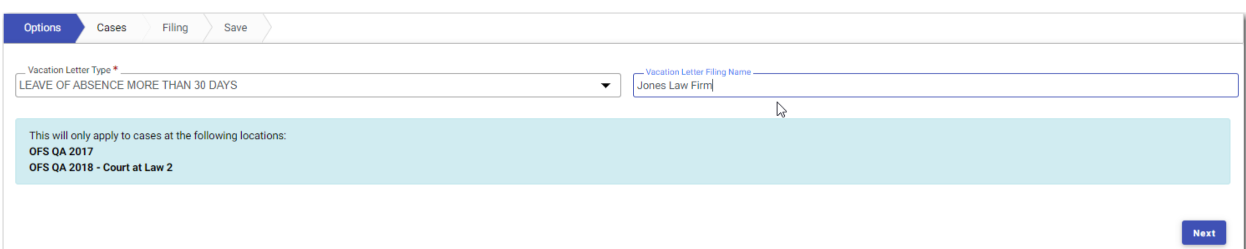
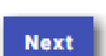


Figure 20.6 – Example of an Options Tab on the File Vacation Letter Page with Fields Completed

4. Click  .

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

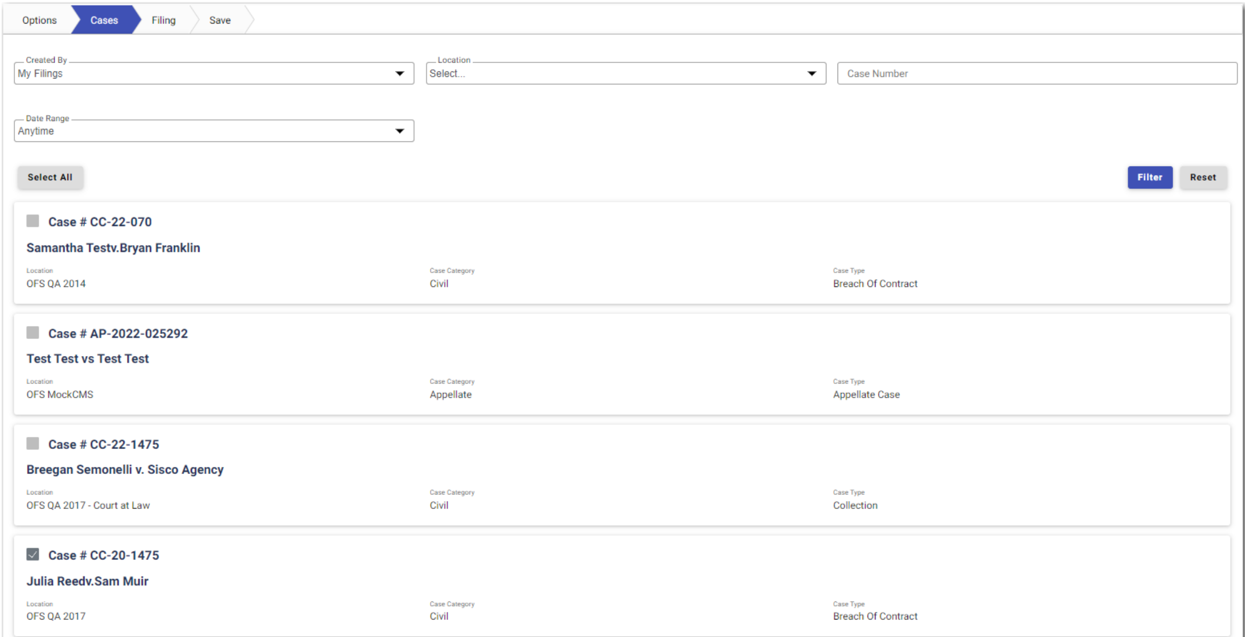


Figure 20.7 – Example of a Cases Tab on the File Vacation Letter Page

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

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

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

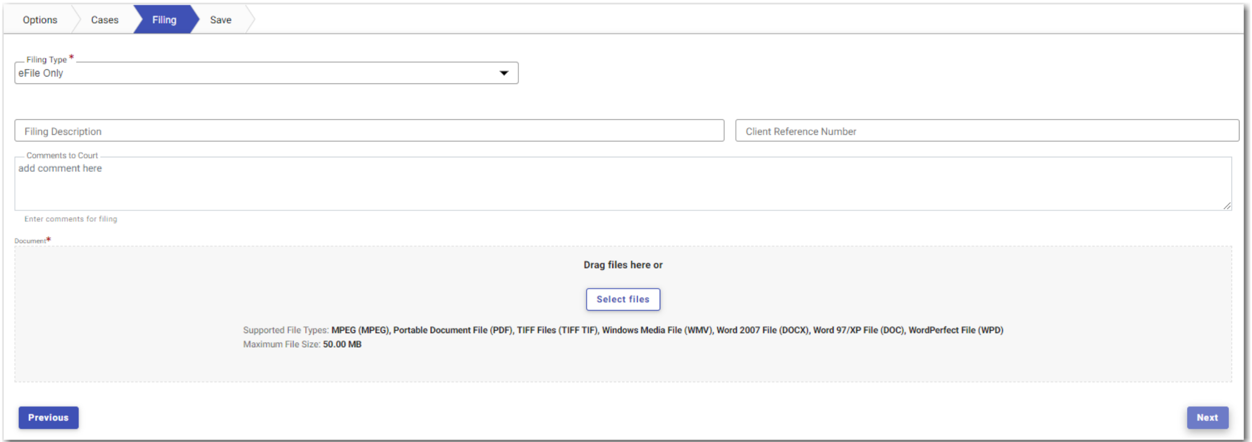


Figure 20.8 – Filing Tab on the File Vacation Letter Page

8. Click **Select files**, and then upload the vacation letter document.
9. Click **Next**.

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

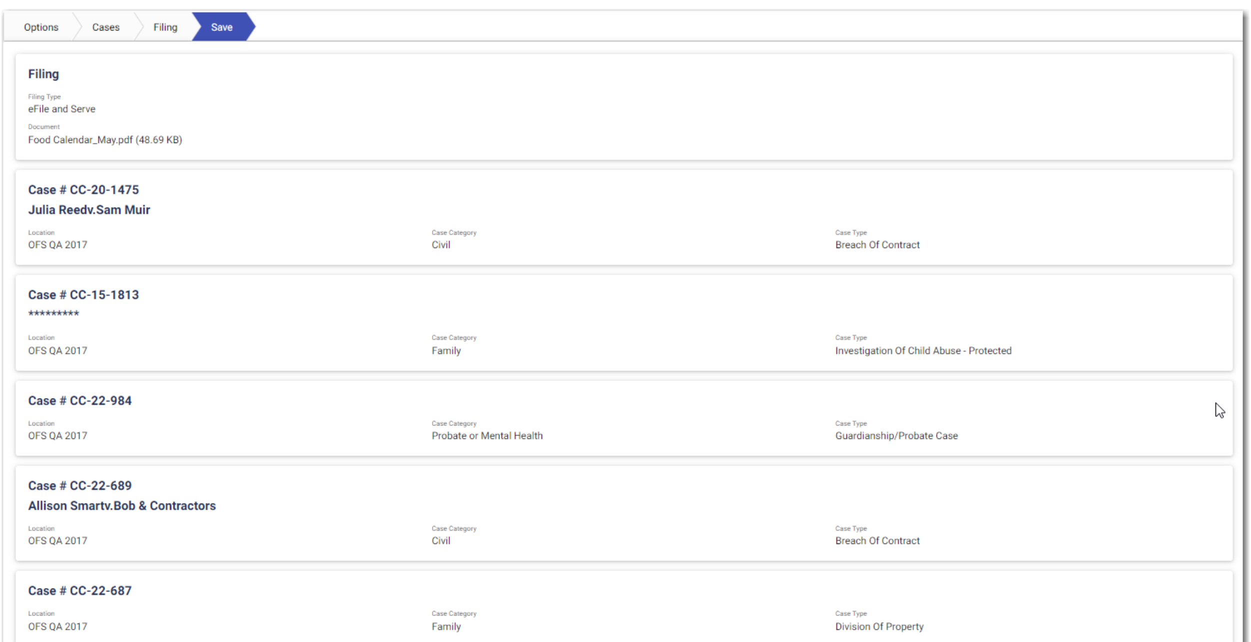


Figure 20.9 – Save Tab on the File Vacation Letter Page

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

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

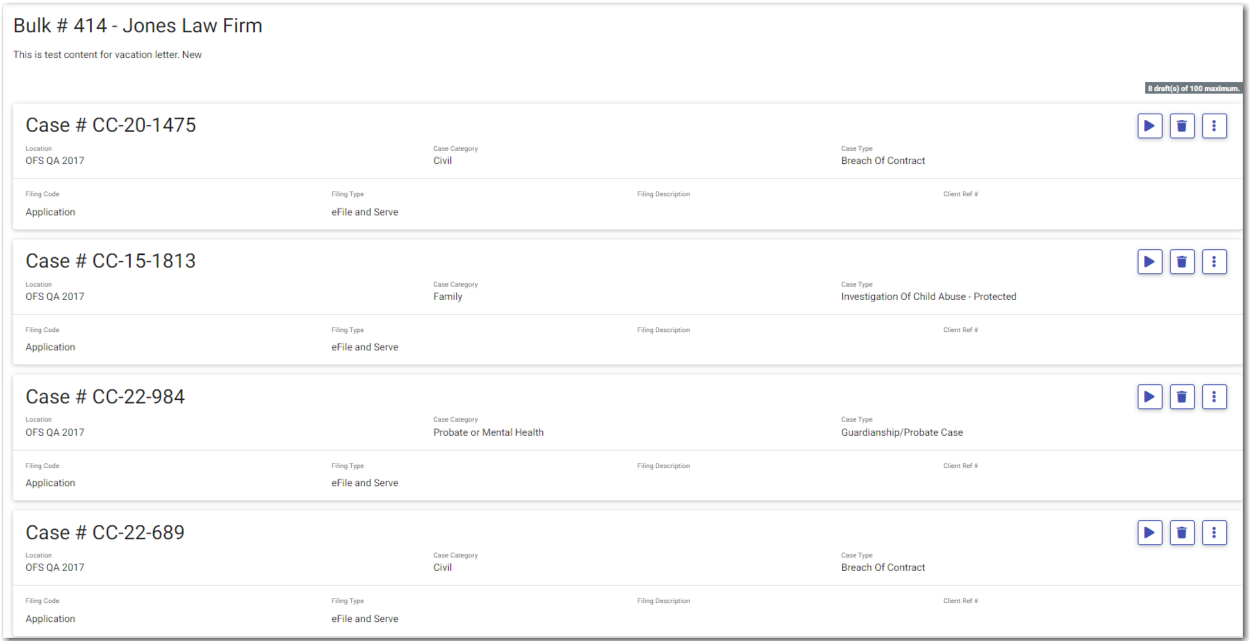
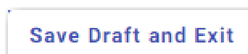


Figure 20.10 – Example of a Vacation Letter Filing on the Bulk Filing Dashboard Page

11. Click 

to continue with your filing, or click 

to save your filing and continue it at another time.

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

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

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

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

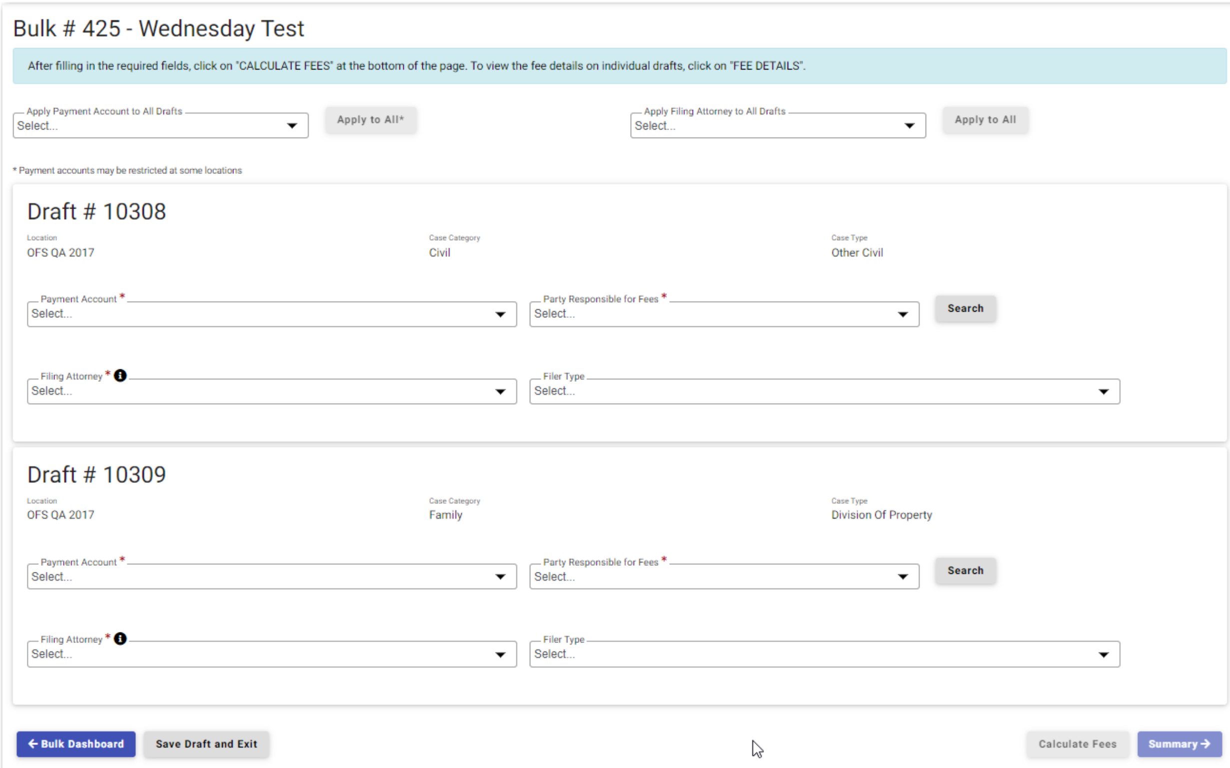
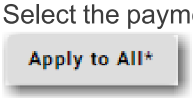


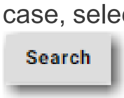
Figure 20.11 – Example of a Bulk Fees Page—Blank Fields

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 

to apply the selected payment account to all of the cases in the bulk filing.
2. Select the filing attorney from the **Apply Filing Attorney to All Drafts** drop-down list. Then, click 

to apply the selected filing attorney to all of the cases in the bulk filing.
3. For each case, select the party responsible for fees from the **Party Responsible for Fees** drop-down list. Click 

if you want to search for a party.

   Note: If there are no fees associated with your filing, you may not be required to make a selection in the Party Responsible for Fees field.
4. For each case, select the filer type from the **Filer Type** drop-down list.

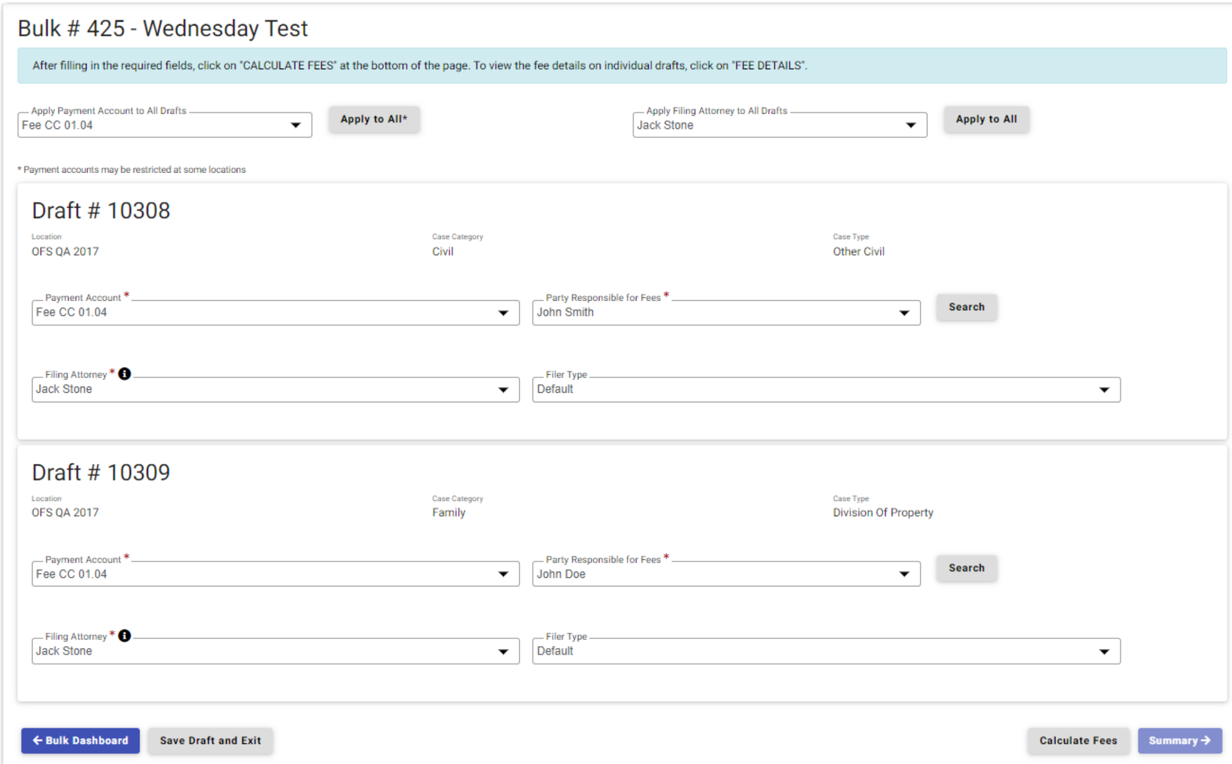
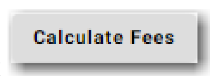
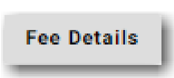


Figure 20.12 – Example of a Bulk Fees Page—Completed Fields

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

   The **Fee Details** button is displayed.

6. Click  .

   The *Fee Details* window is displayed.

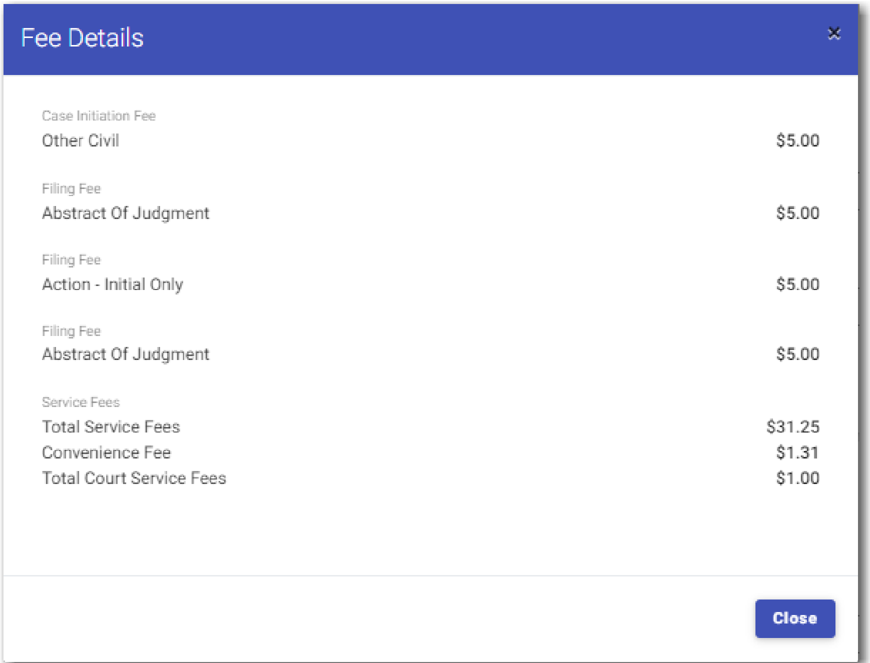


Figure 20.13 – Example of a Fee Details Window

7. Review the filing fees, and then click **Summary →**.

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

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

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

1. Complete the required information on the *File Vacation Letter* page (all of the required fields in each tab) and the *Bulk Fees* page.
2. After you have completed the fields on each page, from the *Bulk Fees* page, click **Summary →**.

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

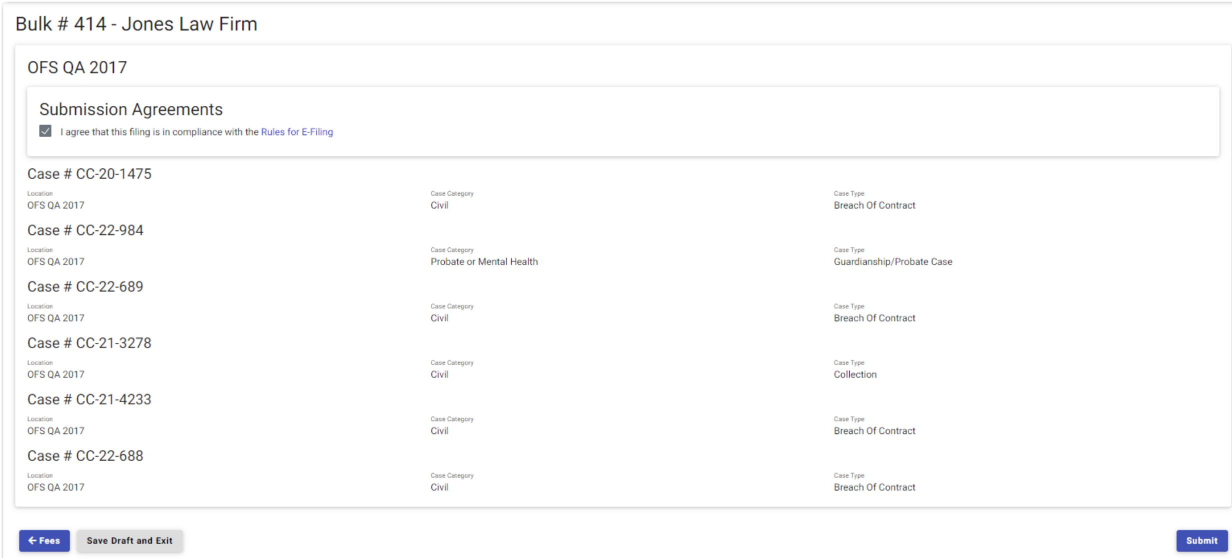


Figure 20.14 – Example of a Bulk Summary Page

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

21 Reports

Topics covered in this chapter

You can run 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.

Running a Report

To run a report:

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

   The *Reports* page is displayed.

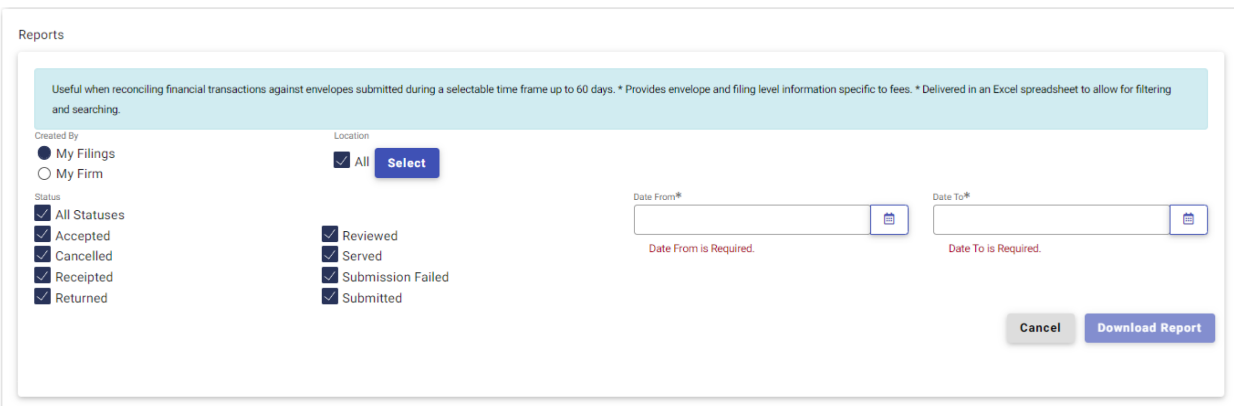


Figure 21.1 – Reports Page

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.

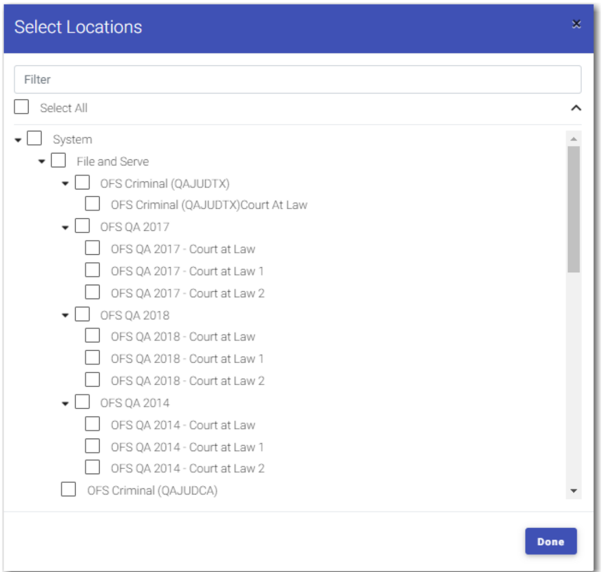


Figure 21.2 – Select Locations Dialog Box

5. Select the locations that you want to include in the report, and then click **Done**.

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.

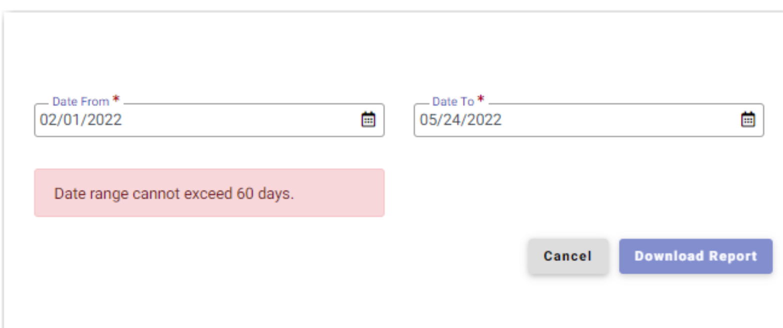


Figure 21.3 – Error Message for Report Date Range

7. Click **Download Report**.

   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.

22 Support and Feedback

Topics covered in this chapter

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

Requesting Support

You can request support from Tyler regarding the application.

To request support regarding the application:

1. Click  in the eFile header.

   The **Help** drop-down list is displayed.

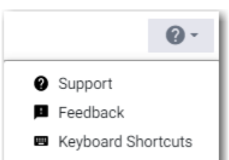


Figure 22.1 – Help Drop-Down List

2. Click **Support**.

   The *Support* window is displayed.

   Note: Your screen may vary from the example provided.

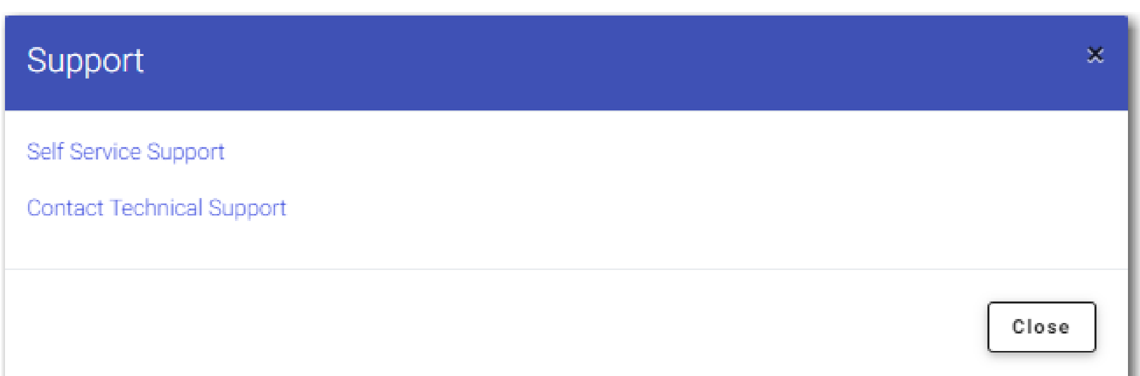


Figure 22.2 – Example of a Support Window

3. Click the support link that you want.

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

4. Click Close.

Zendesk Support

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

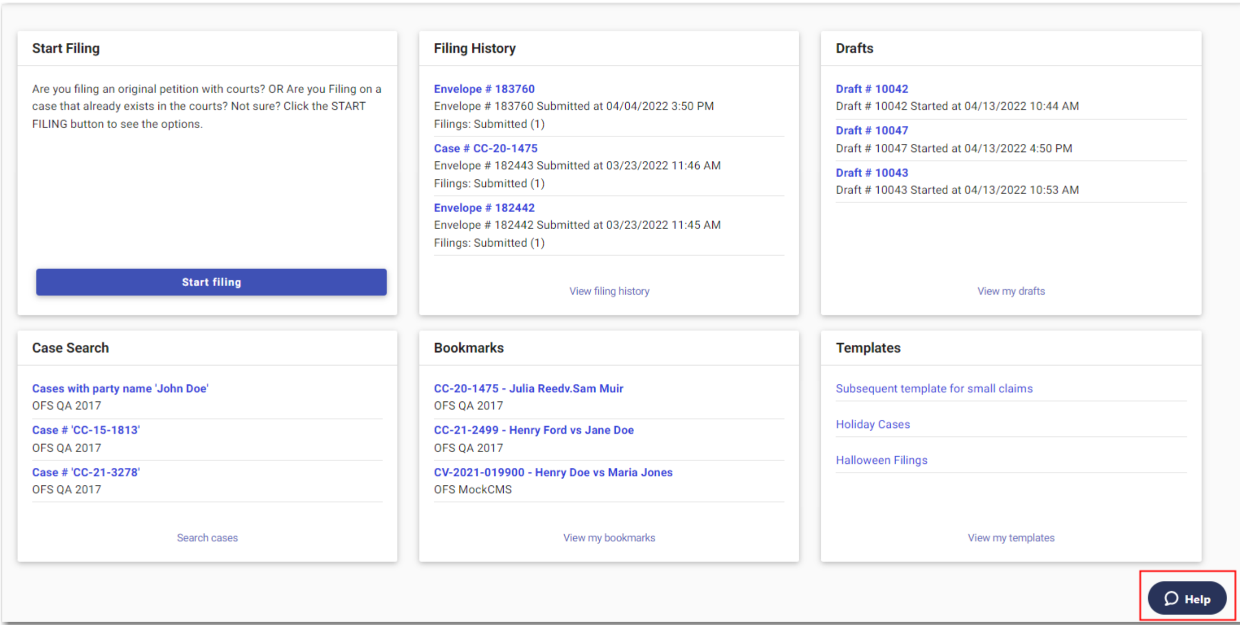


Figure 22.3 – Help Icon on the Dashboard Page

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

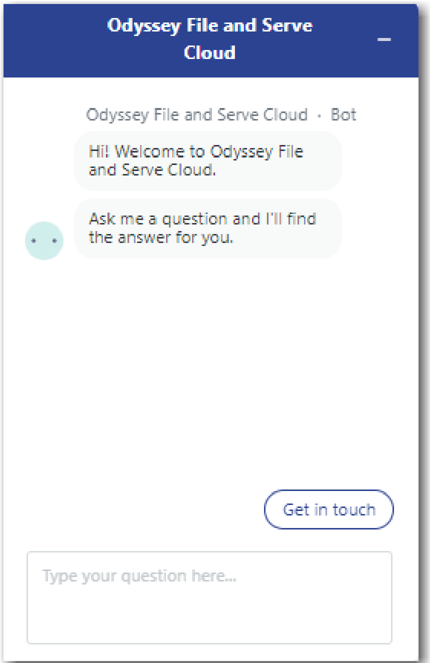


Figure 22.4 – Chat Window

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

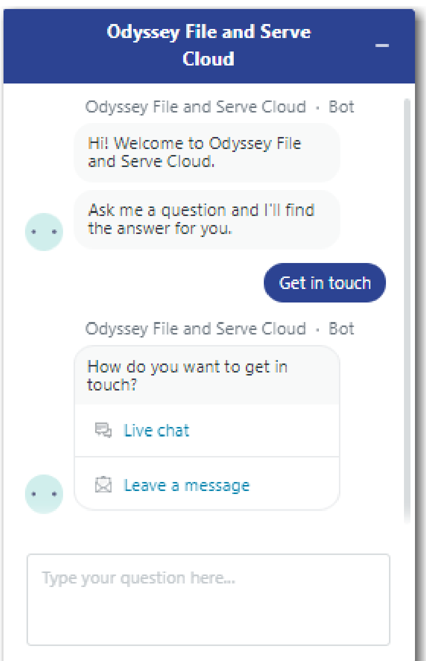


Figure 22.5 – Chat Window with Communication Options

Click the option that you want to use, and then type your question in the chat window. A Support representative will assist you.

Providing Feedback

You can provide feedback to Tyler regarding the application if you want. You can also request a new feature.

To provide feedback regarding the application or to request a new feature:

1. Click  in the eFile header.

   The **Help** drop-down list is displayed.

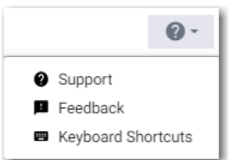


Figure 22.6 – Help Drop-Down List

2. Click **Feedback**.

   The *Feedback* window is displayed.

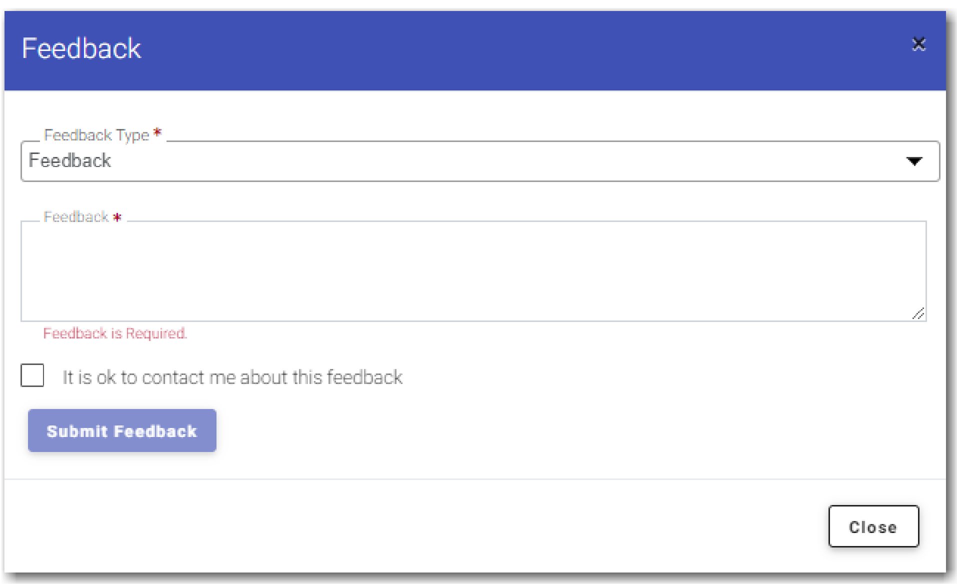


Figure 22.7 – Feedback Window

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

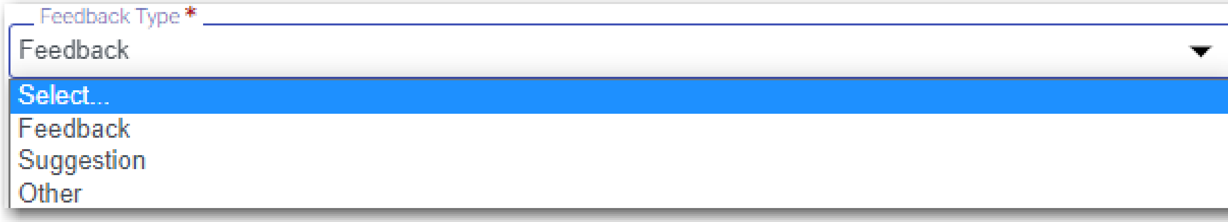


Figure 22.8 – Feedback Type Drop-Down List

4. Type your feedback or suggestion in the **Feedback** comments window.
5. Select the "**It is ok to contact me about this feedback**" check box if you want Tyler to contact you for more information, or leave the check box cleared if you do not want to be contacted.
6. Click 

.
7. Click 

.

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.