Firm Administrator User Guide

Odyssey® File & Serve™ HTML5 2021.0

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Copyright and Confidentiality

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1 System Overview

Topics covered in this chapter

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

Release 2021.0 New Features

This section lists the new features for Release 2021.0.

Note: Features vary based on your system configuration.

Support for Mail-Only Service Contacts

The **Email** field in the **Service Contacts** section of a filing is no longer displayed when only a mailing address is required, and service contact notification only occurs by U.S. mail.

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

Note: Service contacts that are created through the use of the Add New Mail Service Contact option cannot be changed to add an email address at a later time.

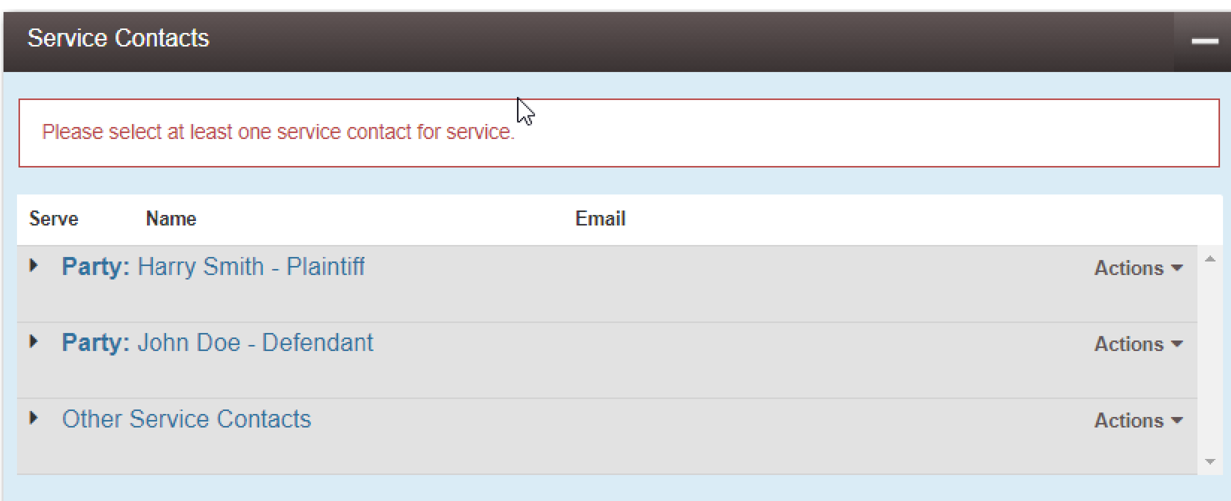


Figure 1.1 – Service Contacts Section

In the **Service Contacts** section, select the party for which you want to add a service contact. From the **Actions** drop-down list for the specified party, click **Add New Mail Service Contact**.

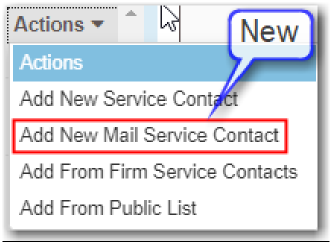


Figure 1.2 – Actions Drop-Down List

The **Service Contacts** section expands to display additional fields.

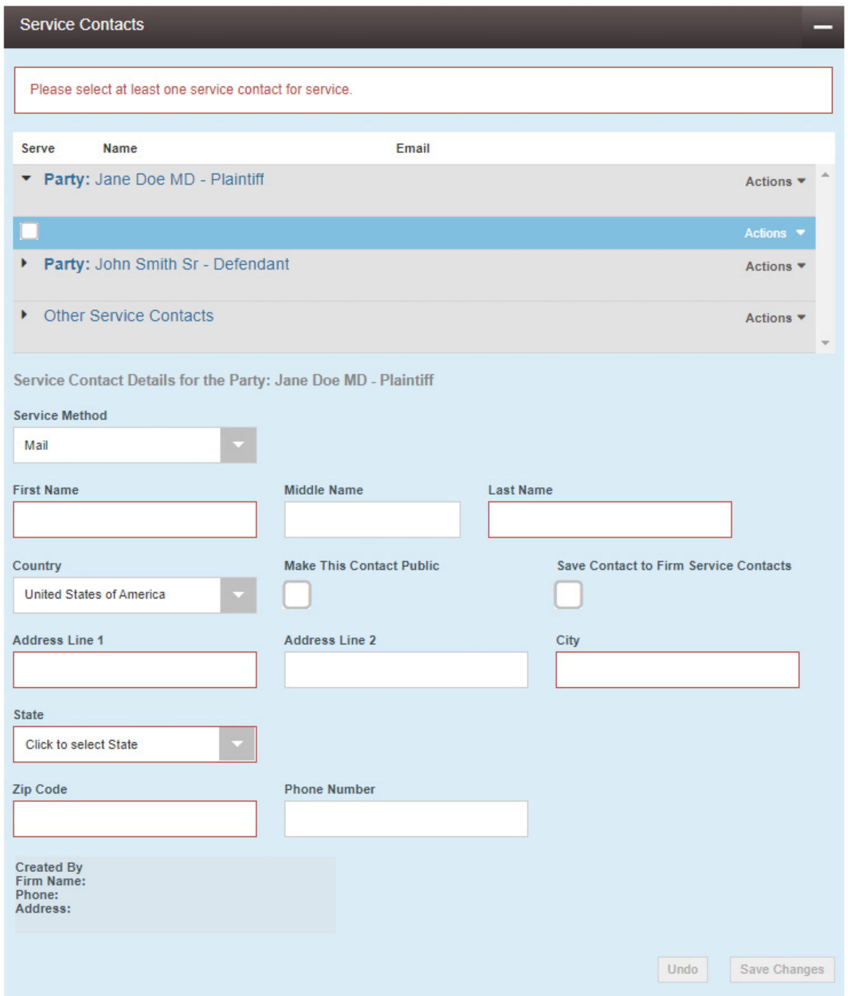


Figure 1.3 – Service Contacts Section for Adding a New Contact

Complete the required fields with the name and address information for the new service contact.

Note: The required fields are indicated with a red border. You must provide a mailing address for the service contact.

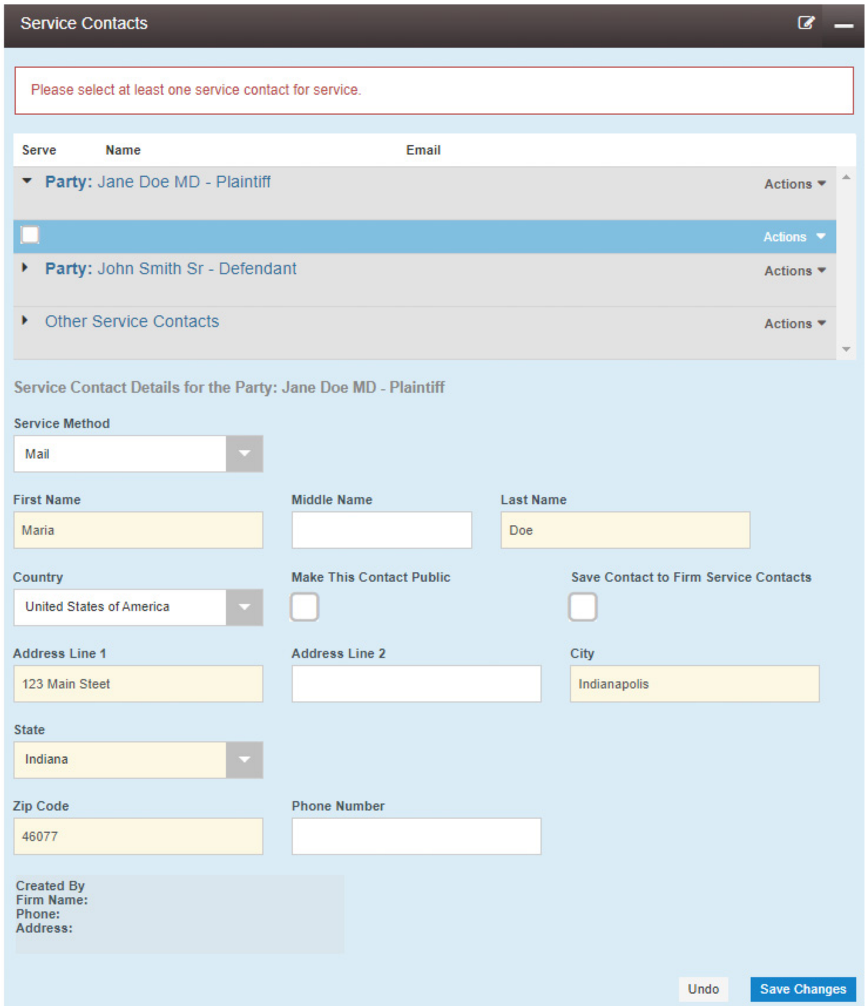


Figure 1.4 – Example of a New Mail Service Contact

Refer to Adding a Mail-Only Service Contact, page 209 for more information.

Before You Begin

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

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

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

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

System Requirements

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

If your browser does not meet the minimum requirements listed below, contact your network administrator.

Browser	Support
Microsoft® Edge®	Yes
Internet Explorer® 6–11	Limited. Support is subject to limitations as set by the browser vendor.
Chrome™ (latest released version)	Yes
Mozilla® Firefox® (latest released version)	Yes
Safari® (latest released version)	Yes **Note: Safari on iOS is not supported.**

- Operating Systems – The system supports Microsoft® Windows®, Linux®, Chrome OS™, Android™, and OS X® desktop class operating system software.

  Note: iOS is not supported.

- Minimum Hardware Requirements – The system supports the following hardware:
  - Intel® Core™ Duo processors or Advanced Micro Devices, Inc. (AMD) processors manufactured in 2012 or later
  - 2 Gigabytes (GB) of Random Access Memory (RAM)
  - 1366 x 768 resolution screens for desktop computers, or 1280 x 720 resolution screens for mobile devices
- Recommended Hardware Requirements – Tyler recommends the following hardware:
  - Intel® Core™ i3 or AMD A6 processors with at least a 2.0 GHz clock speed
  - 4 GB of RAM
  - 1920 x 1080 resolution for both desktop computers and mobile devices
- Connection Requirements – A high-speed Internet connection is recommended.
- Document Format – The Adobe® PDF is the only format allowed for attaching documents in Odyssey File & Serve HTML5.

Page Navigation

The following sections describe how to navigate the system and populate data fields throughout the filing process.

Keyboard Shortcuts

At any time while you are in the Odyssey File & Serve system, you can use keyboard shortcuts for assistance. Press SHIFT+? to display the following window.

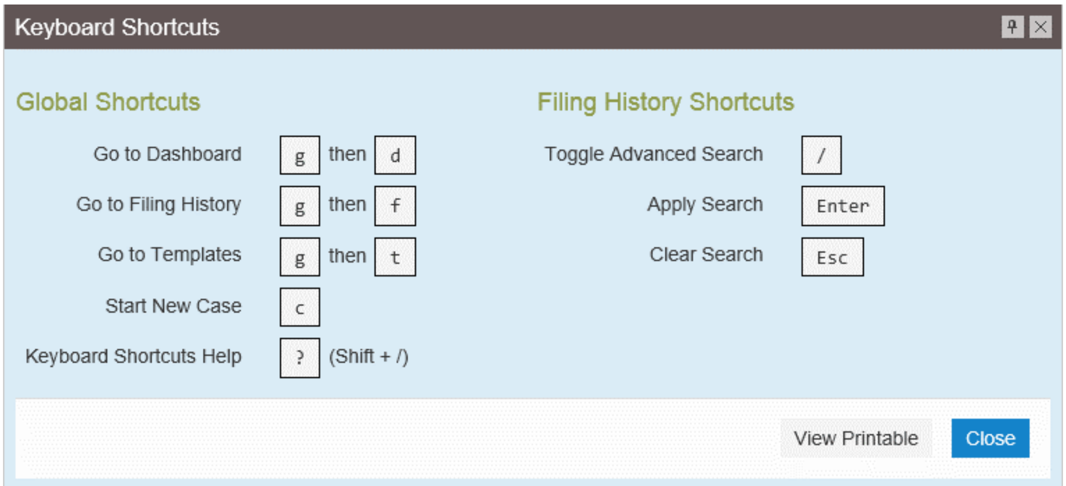


Figure 1.5 – Keyboard Shortcuts Window

Press any shortcut key to initiate an action depending on the key you pressed. The keyboard shortcuts are designed to make your experience flow more smoothly and to help you to gain efficiency in using the system.

Note: The tab key is not functional within the Safari application program.

Resume Filing

During the filing process, the system automatically saves a draft of each page on which you have completed all required fields. This feature allows you to stop work on a filing and resume at a later time. To resume filing a saved draft, navigate to the *Filing History* page and find the draft that you want to complete. From the **Actions** drop-down list, select **Resume Draft Envelope**.

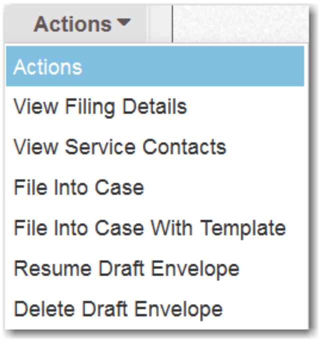


Figure 1.6 – Actions Drop-Down List

Error Messages

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

Enter Data in Required Fields

Required fields are outlined in red on your form. If the information is not entered in the required fields, you will receive error messages when you try to advance to the next page.

Note: Required fields may vary in different sections.

Orientation

When you sign in to Odyssey File & Serve, the *Filer Dashboard* page is displayed. From here, drop-down lists provide various filing options.

Filer Dashboard and Actions Drop-Down List

Start a new case or add a filing to an existing case, using one of two methods:

- From the *Filer Dashboard* page

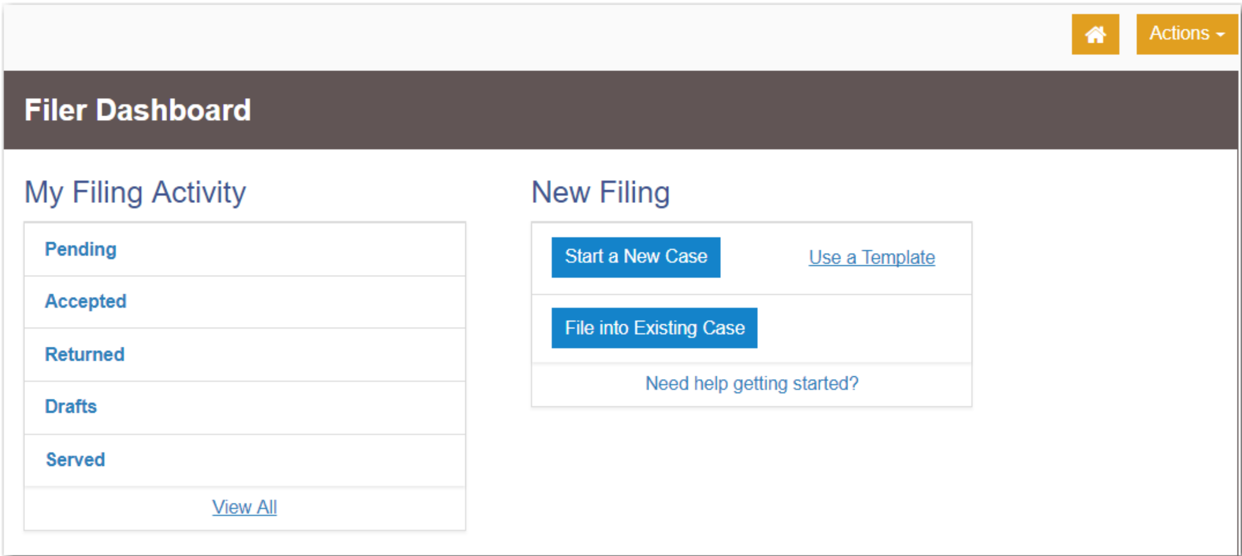


Figure 1.7 – Filer Dashboard Page

From the **Actions** drop-down list

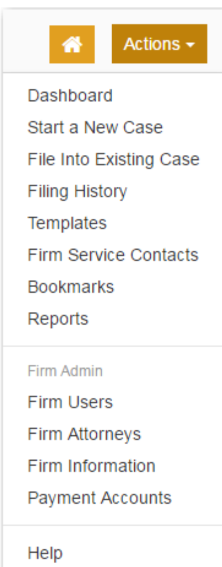


Figure 1.8 – Actions Drop-Down List

The **Actions** drop-down list can also be used for other case actions.

Click the home icon ( ) from any page in the system to return to the *Filer Dashboard* page.

Start a New Case

Click **Start a New Case** to open a new case and enter the required information. You can also select **Start a New Case** from the **Actions** drop-down list.

File Into Existing Case

Click **File into Existing Case** to locate an existing case and add a filing to the case. You can also select **File Into Existing Case** from the **Actions** drop-down list.

The *File Into Existing Case* page includes tooltips. Pause on the case type to view the tooltip associated with that case type.

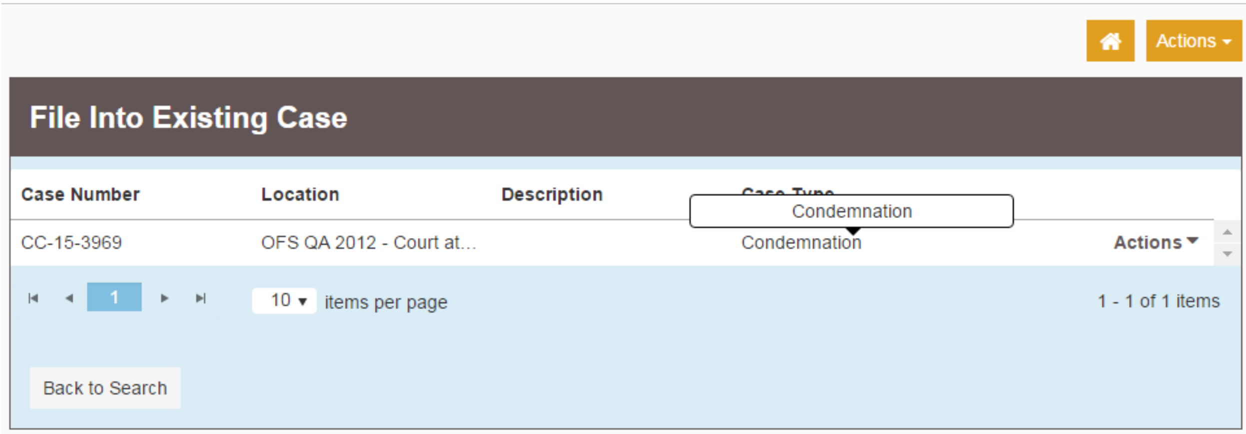


Figure 1.9 – File Into Existing Case Page with Tooltip Displayed

Filing History

After uploading and submitting your filing, it is displayed on the *Filing History* page. From here, you can view the status of your filing, check the filing type, get a document description, see the number assigned to your case, review the details of the case, and cancel a filing. You can also pause on a filing description to see the tooltip associated with that description.

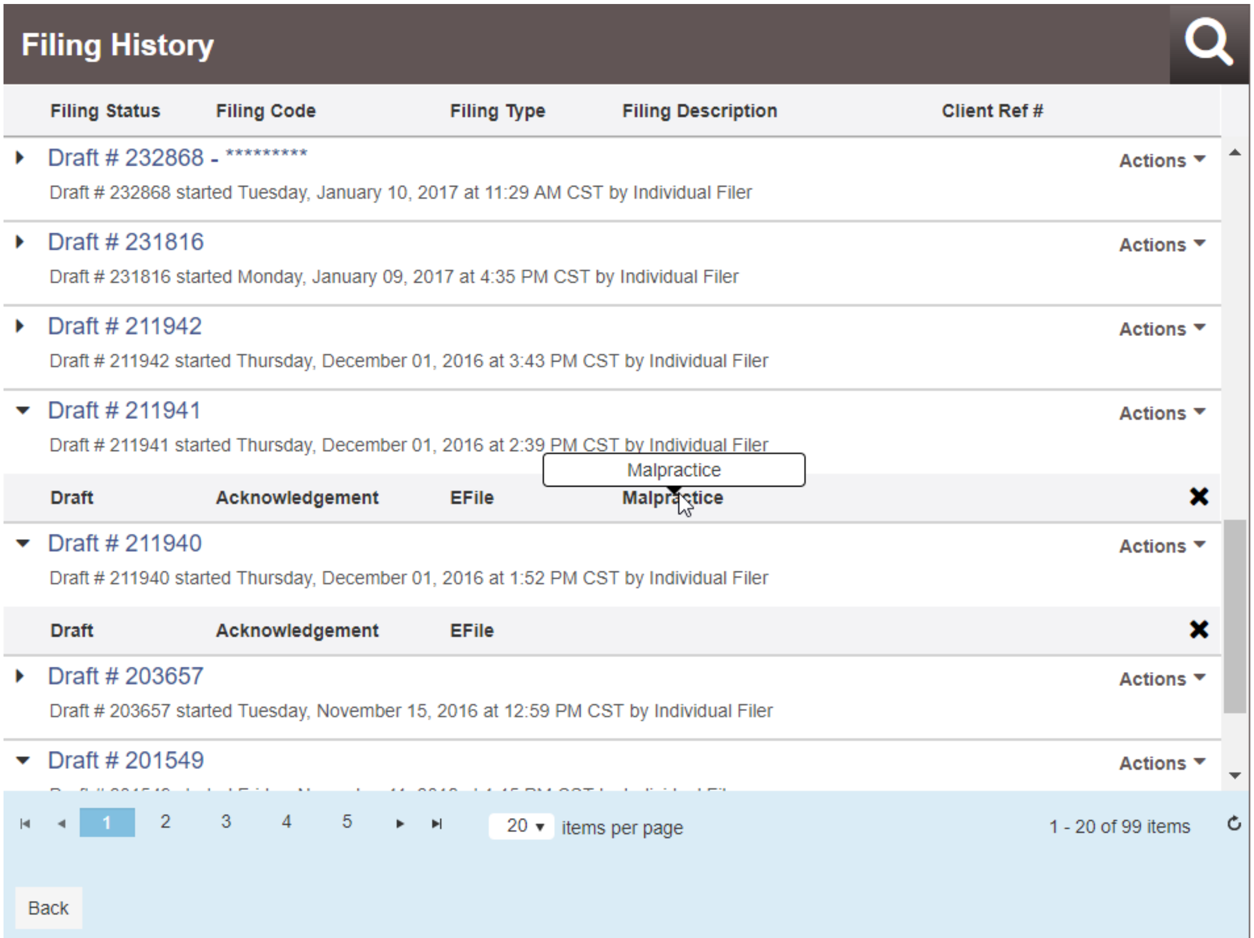


Figure 1.10 – Filing History Page with Tooltip Displayed

Templates

Envelope templates allow you to quickly file into a case or create a new case from a template that you have created, saving you time. Templates exist for new case filings and existing case filings.

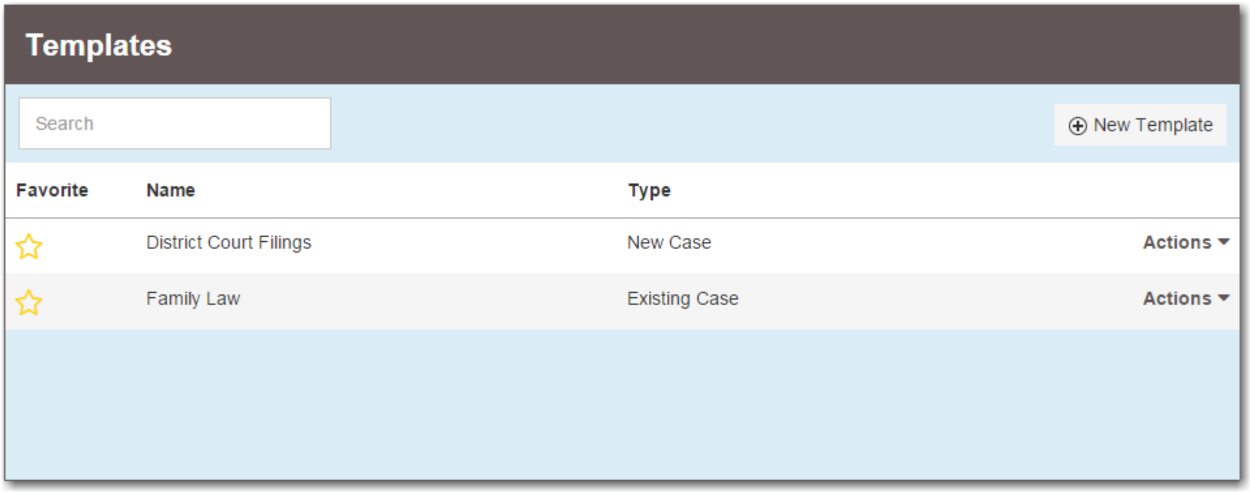


Figure 1.11 – Templates Page

Firm Service Contacts

The **Firm Service Contacts** feature displays all of the service contacts associated with your firm. Firm service contacts can also be deleted from a firm.

Bookmarks

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

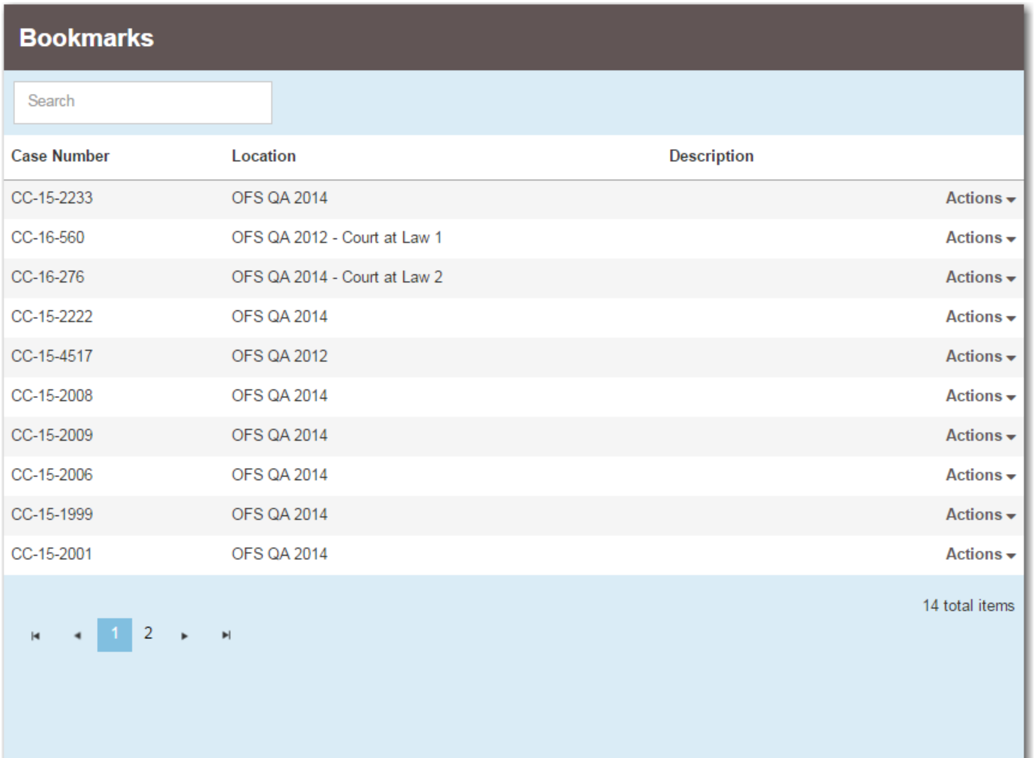


Figure 1.12 – Bookmarks Page

Reports

You can create reports on your filing activity and export the reports into an easily accessible Microsoft® Excel® file.

The Financial Reconciliation Report contains a report at the **Envelope** level that is designed to help you reconcile your filing fees to your credit card statements.

The Filings Report is a detailed look into every filing, filing status, and fee associated with the filings that you or your firm performed.

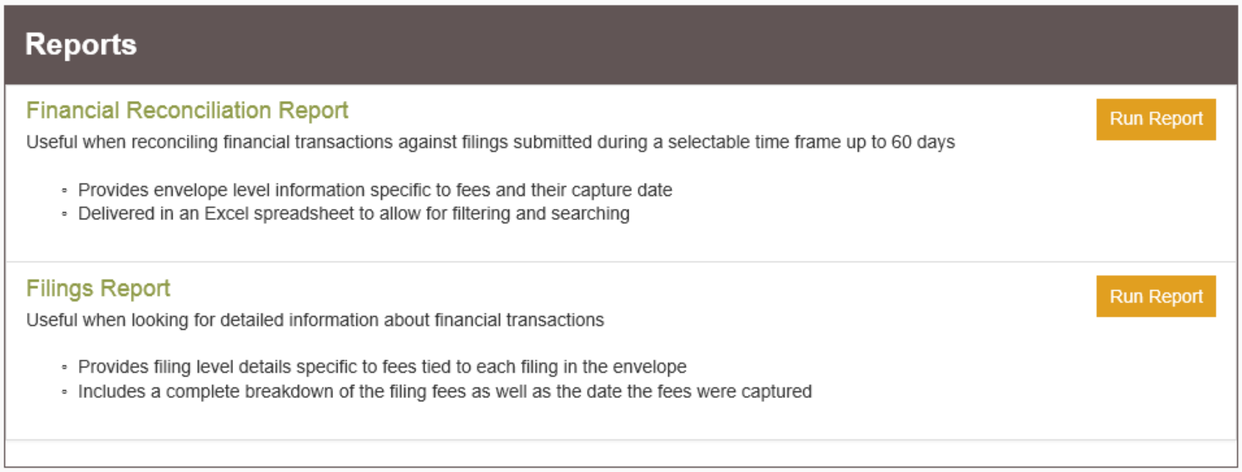


Figure 1.13 – Reports Page

Firm Users

Select **Firm Users** from the **Actions** drop-down list to view a list of users associated with your firm. The list includes users who were approved and not approved by the Firm Administrator. Firm users can be added or removed from the *Firm Users* page.

Firm Attorneys

Select **Firm Attorneys** from the **Actions** drop-down list to view a list of attorneys who are registered with your firm. Attorneys can be added or removed from the *Firm Attorneys* page.

Firm Information

Select **Firm Information** from the **Actions** drop-down list to change the contact information that you previously entered into the system.

Payment Accounts

Select **Payment Accounts** from the **Actions** drop-down list to view the *Payment Accounts* page. From here, you can view the existing payment accounts or add a new payment account.

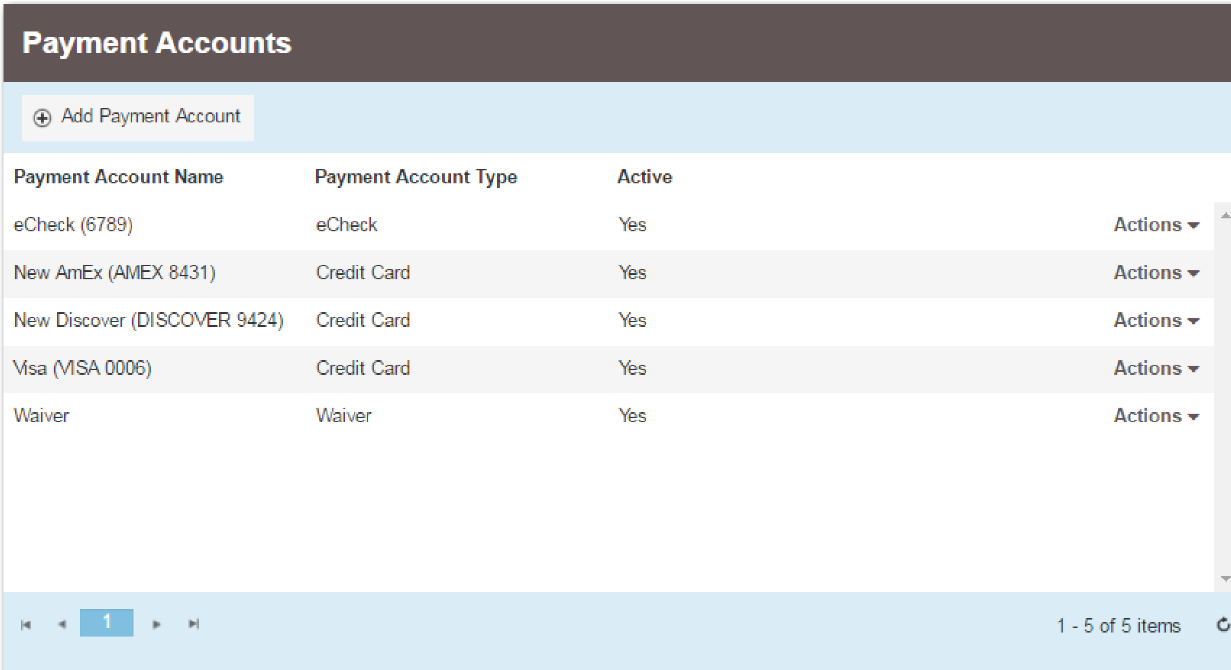


Figure 1.14 – Payment Accounts Page with Existing Payment Accounts

Help

Select **Help** from the **Actions** drop-down list to view additional training materials, contact information, and **Self-Service Support**.

2 E-Filing Overview

Topics covered in this chapter

♦ Filing Queue Status

This section describes the e-filing process.

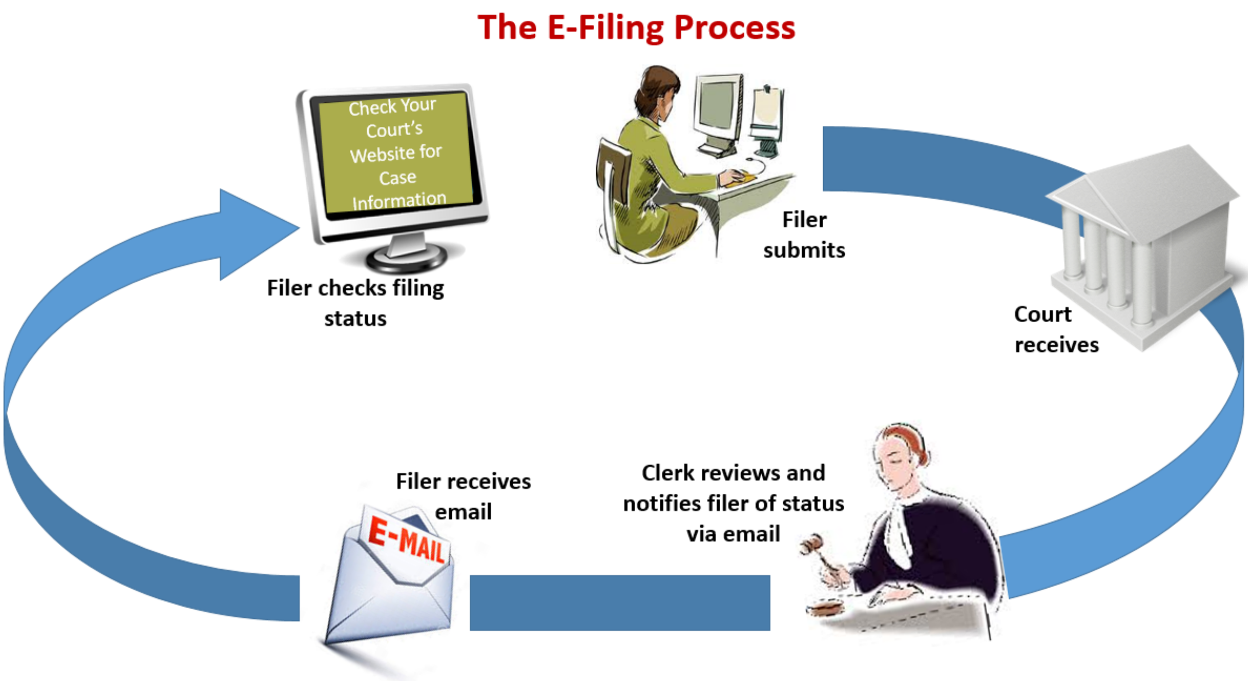


Figure 2.1 – The E-Filing Process

Once a user has registered to use Odyssey® File & Serve™, a filer can electronically file documents to the court. When the filing is submitted, the filing is electronically delivered to the clerk's inbox. The clerk then reviews the filing and either accepts, rejects, or returns the filing.

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

If the filing is returned or rejected, the envelope is sent back to the filer with a reason for the rejection, and the filer is given a time line in which to make the correction and resubmit the filing.

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

Filing Queue Status

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

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

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

Status	Filing Type	Definition
Draft	EFO, EFS, SO	The filer has entered full or partial filing data, but has not yet submitted the filing.
Submitting	EFO, EFS, SO	The filer has submitted the filing, but the document file format and payment information have not been verified on the back end.
Submitted	EFO, EFS, SO	The document file format and payment information have been verified and accepted, but the filing has not yet entered the Review Queue/Workflow Process.
Court Processing	EFO, EFS, SO	Some additional action needs to be taken by the court.
Under Review	EFO, EFS	A clerk reviewer has selected a filing from a queue. **Note: Once a filing reaches the Under Review status, it cannot return to the Submitted status. Selecting the End Review retains the Under Review status and returns the filing to the queue.**
Receipted	EFO, EFS	The filing has been acknowledged by the court as received, but it is not being transmitted to the case management system to become part of the court record. The filing may or may not be part of the proposed order work flow.
Accepted	EFO, EFS	The reviewer has reviewed the filing and accepted it.
Rejected	EFO, EFS	The reviewer has reviewed the filing and rejected it.
Returned	EFO, EFS	The reviewer has reviewed and returned the filing because the filer must take additional action.

Status	Filing Type	Definition
		Note: The filer can cancel or copy a filing in the Returned status.
Served	SO	Service Only filings are completed.
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 only cancel 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 specifics through email.

3 Home Page

Topics covered in this chapter

♦ Registering as a Firm Administrator and Creating a New Firm
♦ Resetting Your Password
♦ Resetting a Firm User's Password

The *Home* page serves as the gateway to the system. From this page, you can register, sign in, view training sessions, and get contact information for Technical Support.

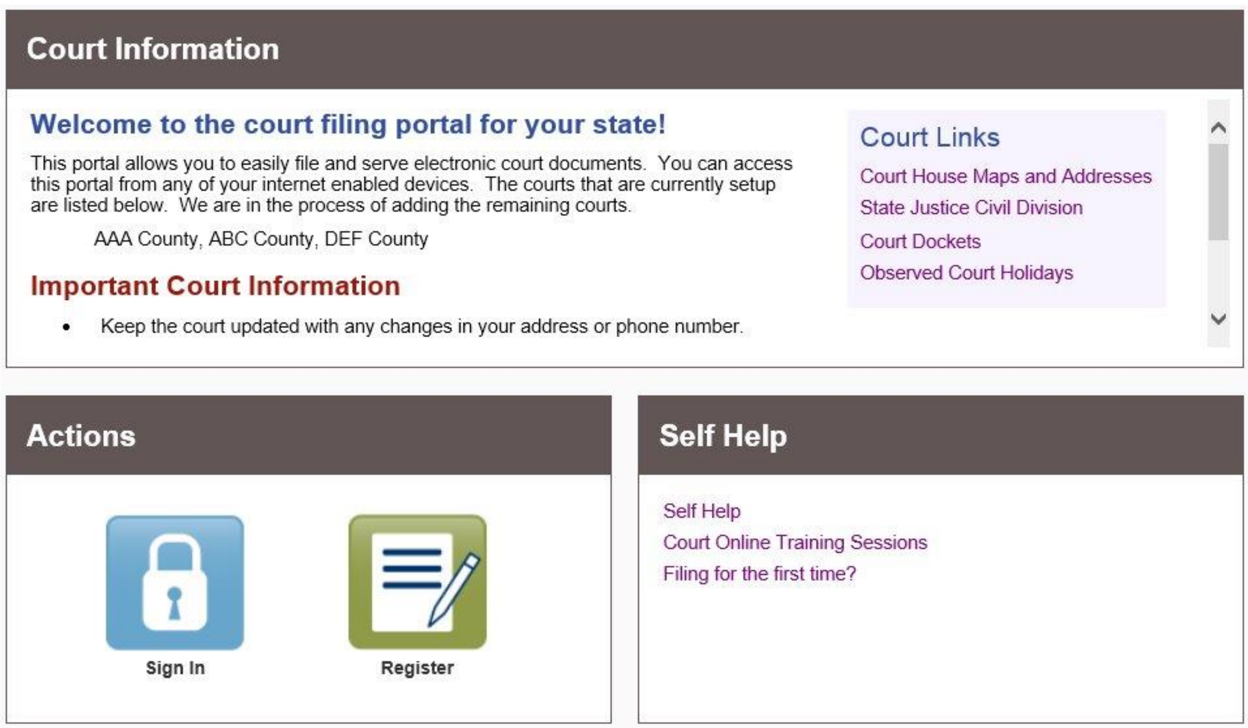


Figure 3.1 – Odyssey File & Serve Home Page

Court Information

The **Court Information** panel provides links to the courts in your area. Click those links to access detailed information about the courts, including their location and general information about each court.

Actions

The **Actions** panel is where you sign in to the system or register as a user.

The **Sign In** area is where you sign in to and use the Odyssey File & Serve system. Type your email address and password to sign in to Odyssey File & Serve.

The **Register** link takes you to the page where you can register in the system by using your name and contact information. Odyssey File & Serve requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

Self Help

The **Self Help** panel contains links to online training sessions, answers to questions regarding e-filing, and user documentation.

The following types of documents are available to help you answer many of your day-to-day operation questions:

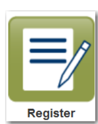
- The *Individual Filer User Guide* provides step-by-step instructions on using the system. The user guide covers activities such as signing into the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and passwords.
- The *Firm Administrator Guide* is specifically for the Firm Administrator. This guide covers administrative functions such as registering the firm, managing firm users, payments, and attorney accounts, as well as creating and editing the firm's service contact lists.
- The *Firm and Criminal Filing Filer User Guide* is specifically for the firm users and the users with the Criminal Filing Filer role who are not Firm Administrators. This guide covers activities such as signing into the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and passwords.
- The *Quick Reference Guide* (QRG) provides only the steps needed to complete common tasks such as registering for an account, initiating a new case, and filing into an existing case.

Registering as a Firm Administrator and Creating a New Firm

If your firm has not been registered yet, register your firm and create a Firm Administrator account.

Note: If you are unsure whether your firm already exists in the Odyssey File & Serve system, ask your firm associates. If a firm account already exists, request an invitation to join the firm in the Odyssey File & Serve system (as opposed to attempting to create a new account and creating a new firm).

To register as a Firm Administrator and create a new firm, perform the following steps:

1. From the *Home* page, click 

.

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

2. Complete the required fields outlined in red font: **First Name**, **Last Name**, **Email Address**, **Password**, **Security Question**, and **Security Answer**.
3. Click 

.
4. On the next page, select the check box for a firm account.

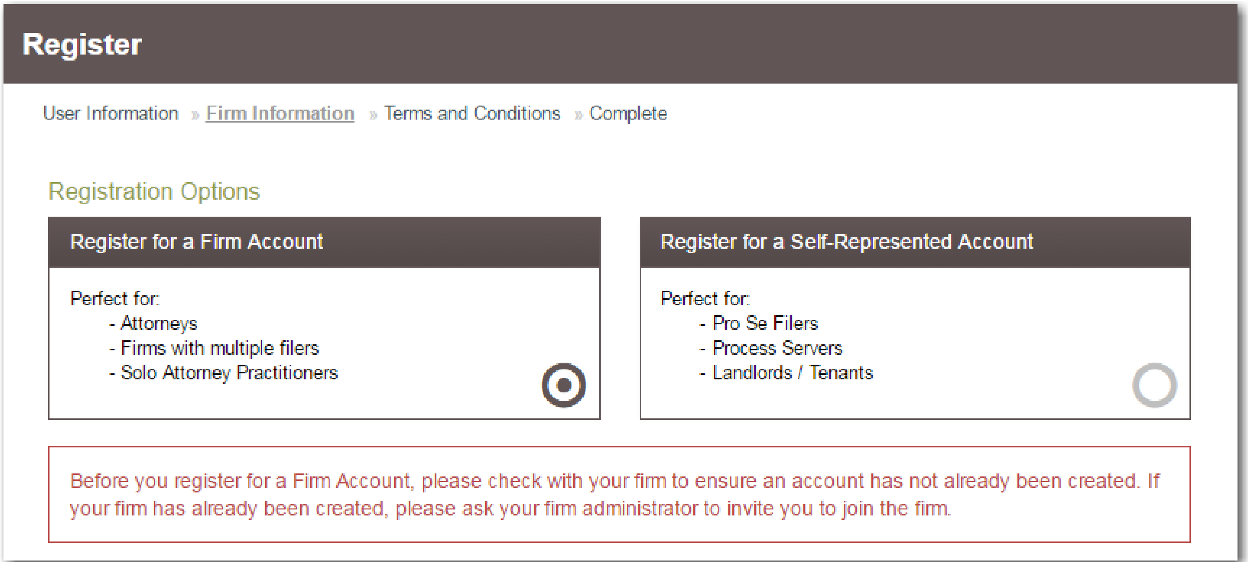
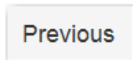


Figure 3.2 – Register Page – Firm Account

5. Complete the required fields.
6. Click 

 to continue with your registration, or click 

 to return to the previous page.
7. If you choose to continue with your registration, the *Register* page is displayed. Read the agreement before proceeding.

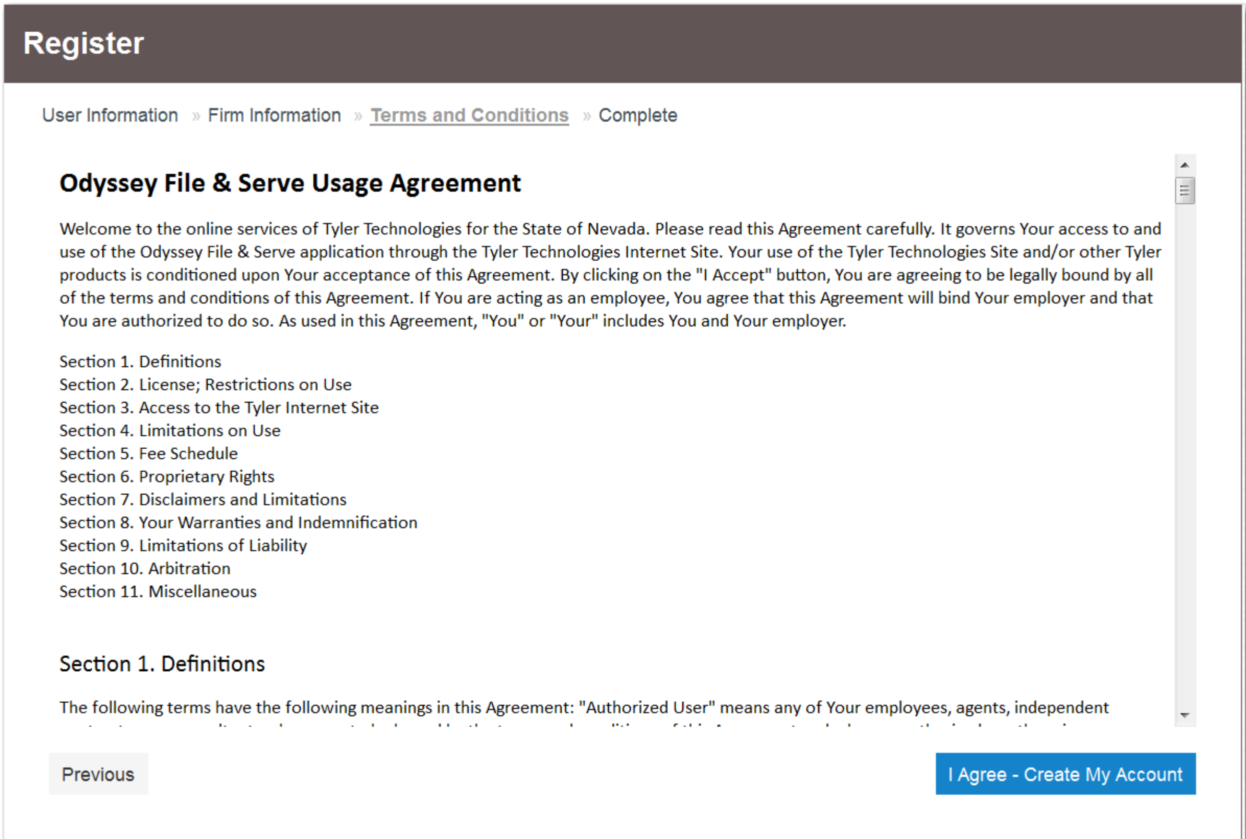


Figure 3.3 – Register Page with Usage Agreement

8. Select I Agree - Create My Account to accept and agree to the terms listed on your page. If you do not want to continue with your registration, click Previous to return to the previous page.
9. If you continue with your registration, a confirmation page is displayed, and a verification email is sent to the email address you provided.

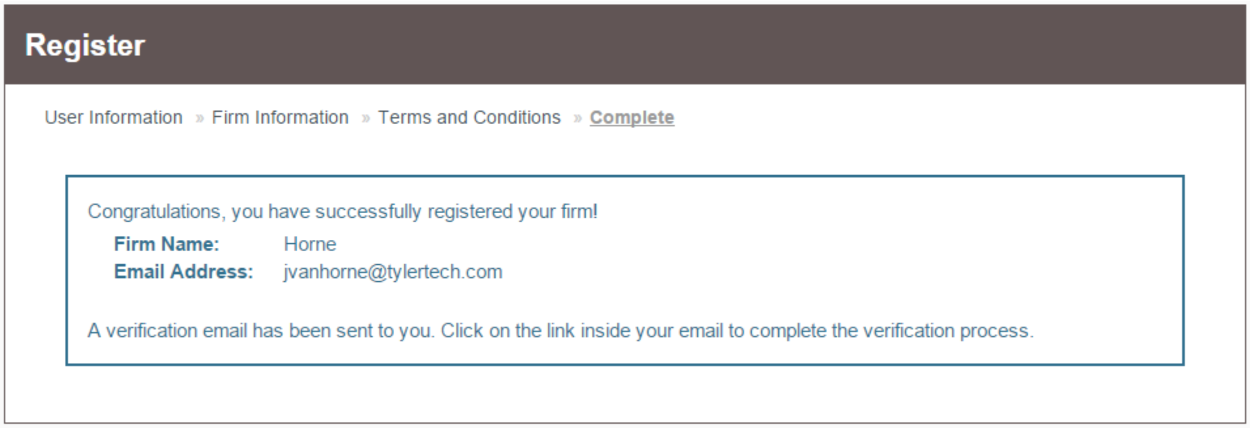


Figure 3.4 – Register Page with Confirmation

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

Your registration is complete. Navigate to the *Home* page to log on.

Resetting Your Password

To reset your password, perform the following steps:

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

.
2. Type your email address in the **User ID** field.

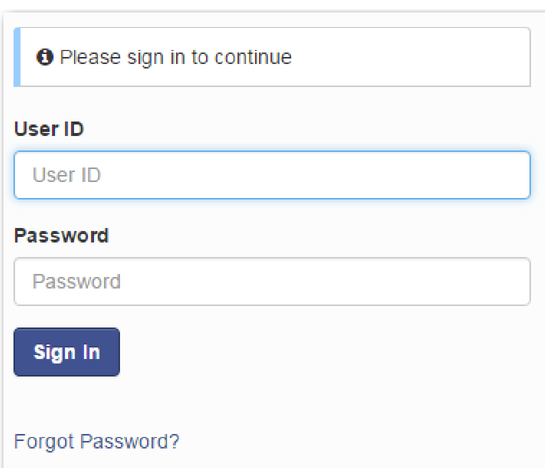
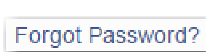


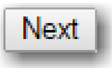
Figure 3.5 – Sign In Page

3. Click 

.

A page is displayed with a message requesting that you type your email address.

Figure 3.6 – Change Password Page

4. Type the email address that you provided during the registration process in the **Email Address** field.
5. Click 

.

   A message is displayed asking if you are a human and not a robot.
6. Select the **I'm not a robot** check box.

   Note: The size of the screen that is displayed may vary, depending on where you are in the system when you request a password reset.

Figure 3.7 – Password Reset Page – Check Box Cleared

   A screen might be displayed from which you must select specified images. If so, continue with the next step. If not, continue with Step 8.

7. Click the requested images, and then click 

.

   If you selected the proper images during the verification process, the first screen is displayed again, and the **I'm not a robot** check box is now selected.

   Note: The size of the screen that is displayed may vary, depending on where you are in the system when you request a password reset.

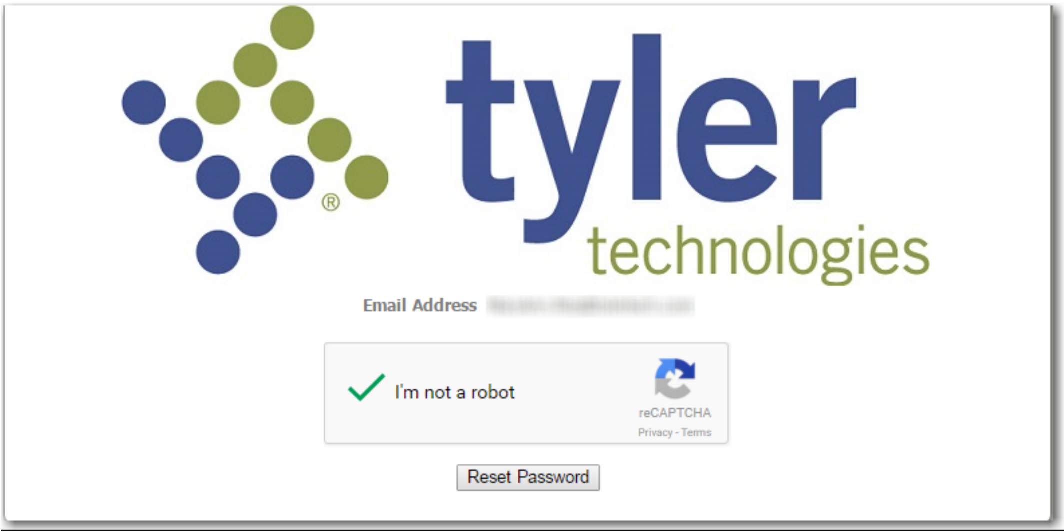


Figure 3.8 – Password Reset Page – Check Box Selected

8. Click Reset Password.

   When you have successfully selected the correct images (if you were asked to do so), the system displays the following message: `A password reset link has been sent to the email address associated with your account. If you do not see the password reset email in your Inbox, please check to see if it was delivered to your spam folder.`

9. Check your email inbox.
10. Locate the email from Odyssey File & Serve.
11. Click the link that is labeled click **here** to reset your password.

    You are prompted to create a new password.

12. Type a new password in the **New Password** field.
13. Retype your new password in the **Repeat New Password** field.
14. Click **Change Password**.

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

Resetting a Firm User's Password

Firm Administrators can reset passwords for firm users who cannot reset their own passwords.

To reset a firm user's password, perform the following steps:

1. Navigate to the *Firm Users* page.

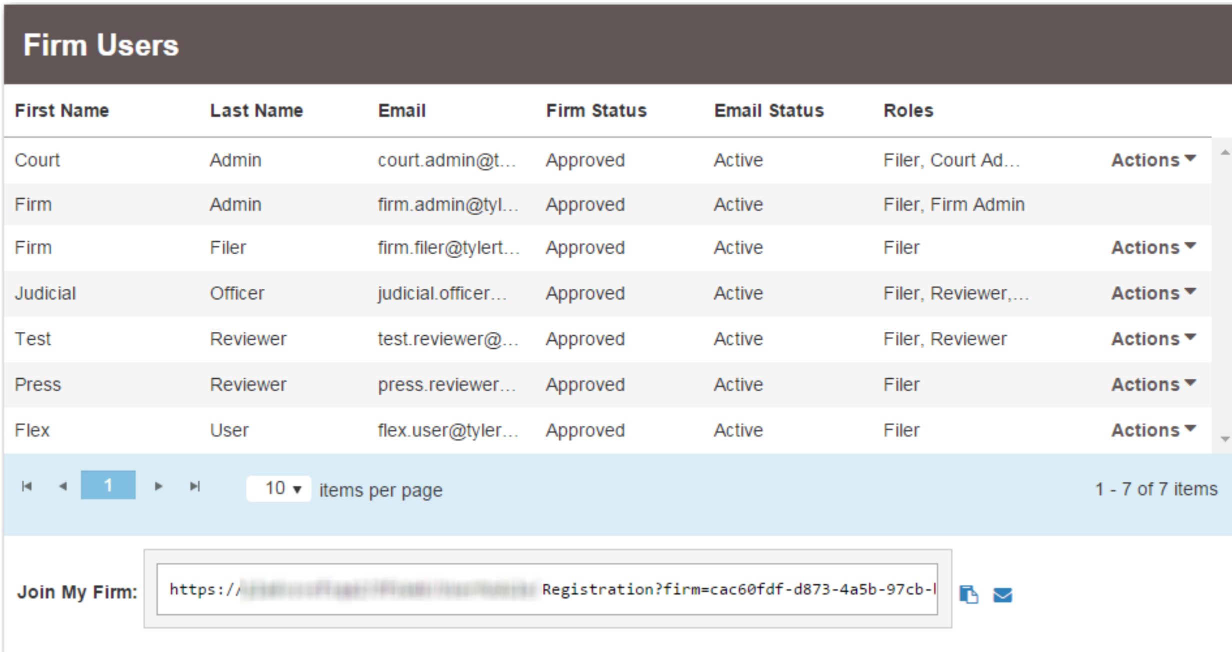


Figure 3.9 – Firm Users Page

2. Locate the firm user for whom you want to reset the password. From the **Actions** drop-down list for that user, click **Reset Password**.

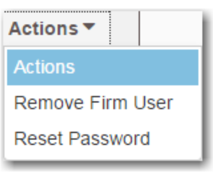


Figure 3.10 – Firm Users Actions Drop-Down List

The *Reset Password* dialog box is displayed.

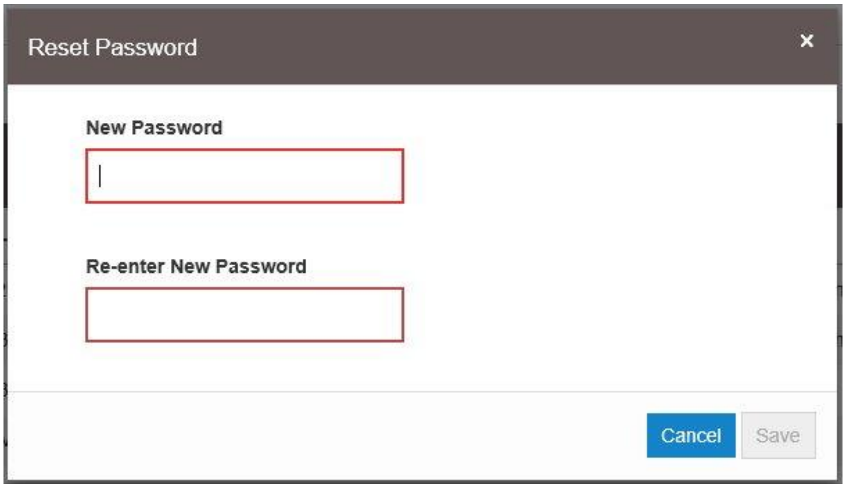


Figure 3.11 – Reset Password Dialog Box

3. Type the new password in the **New Password** field.
4. Retype the same password in the **Re-enter New Password** field.
5. Click Save to save your changes, or click Cancel to cancel the action.

4 Sign In and Sign Out

Topics covered in this chapter

All users are required to sign in to e-file and e-serve a document 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 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 

to register if you have not registered before.

To sign in, perform the following steps:

1. Navigate to the Odyssey File & Serve *Home* page.
2. Click 

.
3. Type your email address and password (which is case sensitive) in the fields provided.

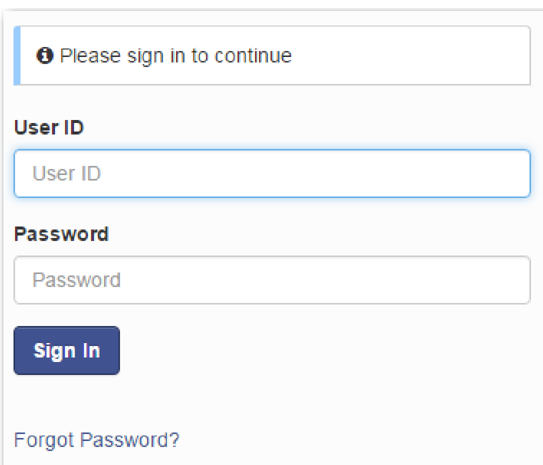


Figure 4.1 – Sign In Page

4. Click 

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

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

Signing Out

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

Perform the following steps to sign out:

1. From the profile drop-down list on the page, click **Sign Out**.

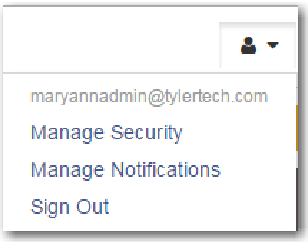


Figure 4.2 – Sign Out Option on Profile Drop-Down List

The *Sign Out* page is displayed.

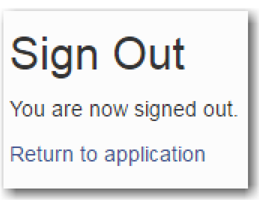


Figure 4.3 – Sign Out Page

2. Return to the *Home* page to sign in to the system.

5 Profile Preferences

Topics covered in this chapter

♦ Changing the User Password
♦ Changing the Security Question
♦ Managing Notifications

The profile drop-down list provides options for changing your password and managing your notifications.

Changing the User Password

Change your password from the *Manage Security* page.

To change the user password, perform the following steps:

1. From the profile drop-down list, select **Manage Security**.

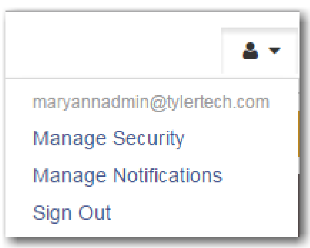


Figure 5.1 – Profile Drop-Down List

The *Manage Security* page is displayed.

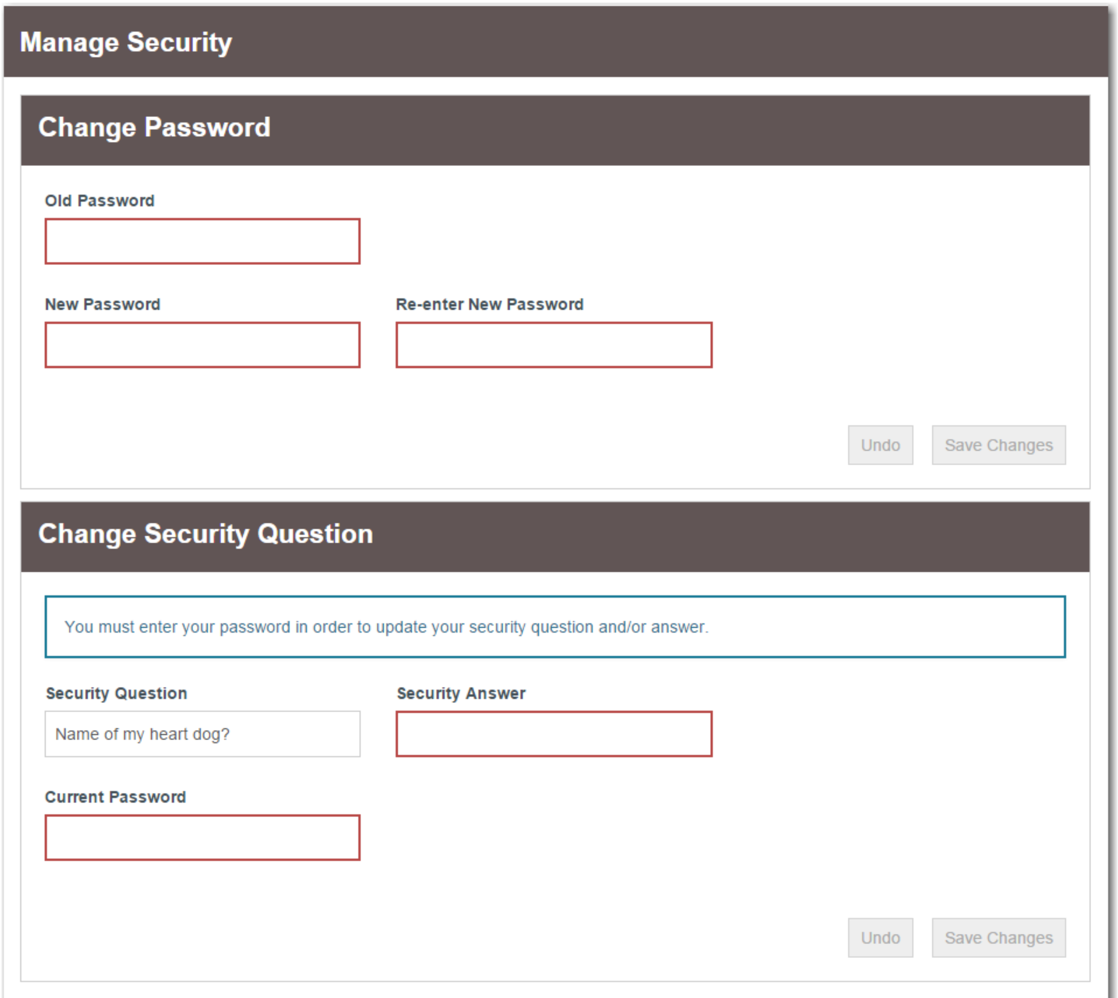
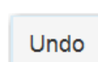


Figure 5.2 – Manage Security Page

2. Type your old password, followed by your new password. Then, retype your new password.

   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.

3. Click 

to change your password, or click 

to exit without changing your password.

Changing the Security Question

Change your security question from the *Manage Security* page.

To change your security question, perform the following steps:

1. From the profile drop-down list, select **Manage Security**.

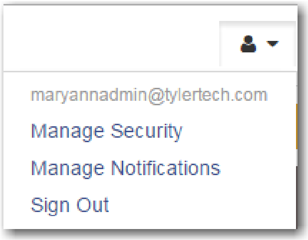


Figure 5.3 – Profile Drop-Down List

The *Manage Security* page is displayed.

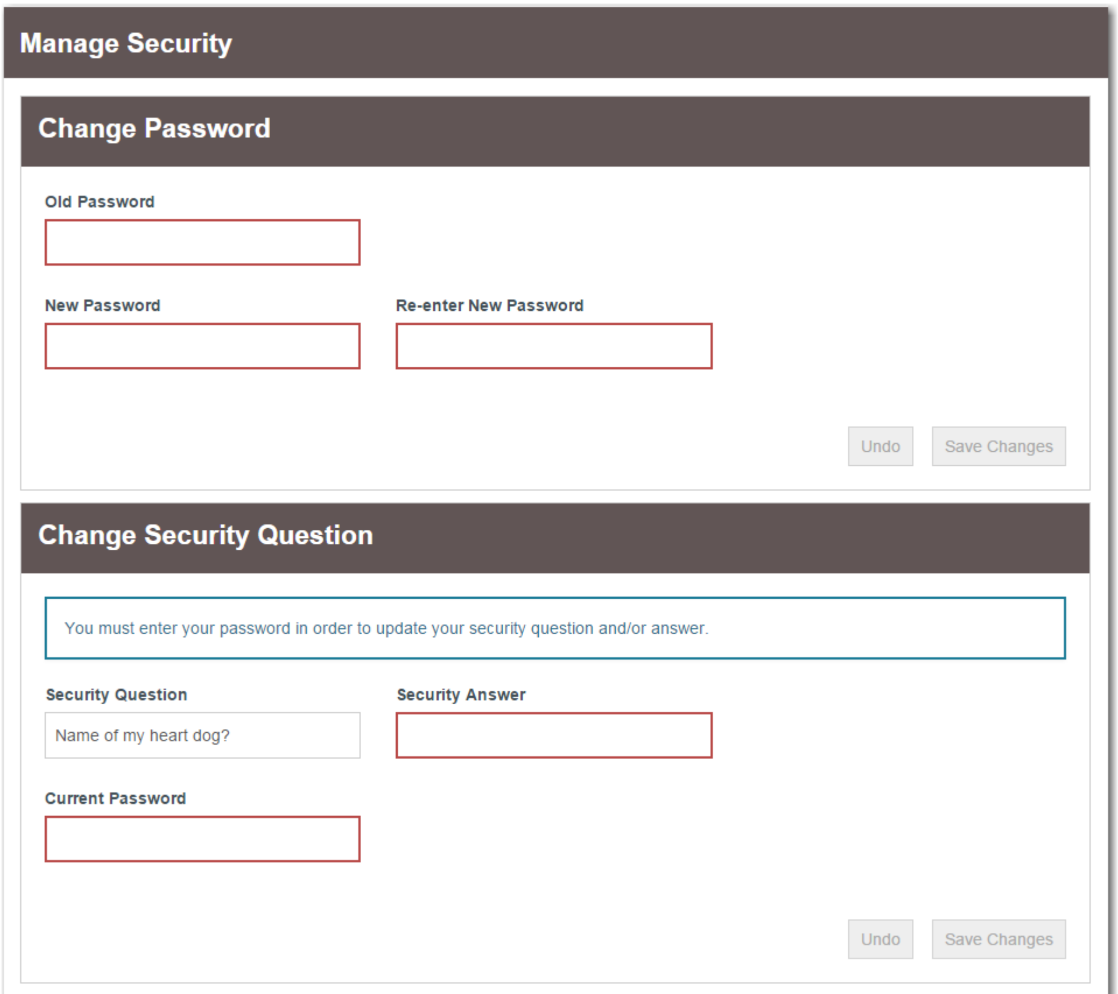
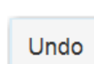


Figure 5.4 – Manage Security Page

2. Change your security question and answer by typing your new information in the **Security Question** and **Security Answer** fields. Then, type your current password in the **Current Password** field.
3. Click 
 to change your security information, or click 
 to exit without changing your security information.

Managing Notifications

You can set your notification preferences for receiving filing information.

Perform the following steps to set your email notifications:

1. From the profile drop-down list, select **Manage Notifications**.

   The *Manage Notifications* page is displayed.

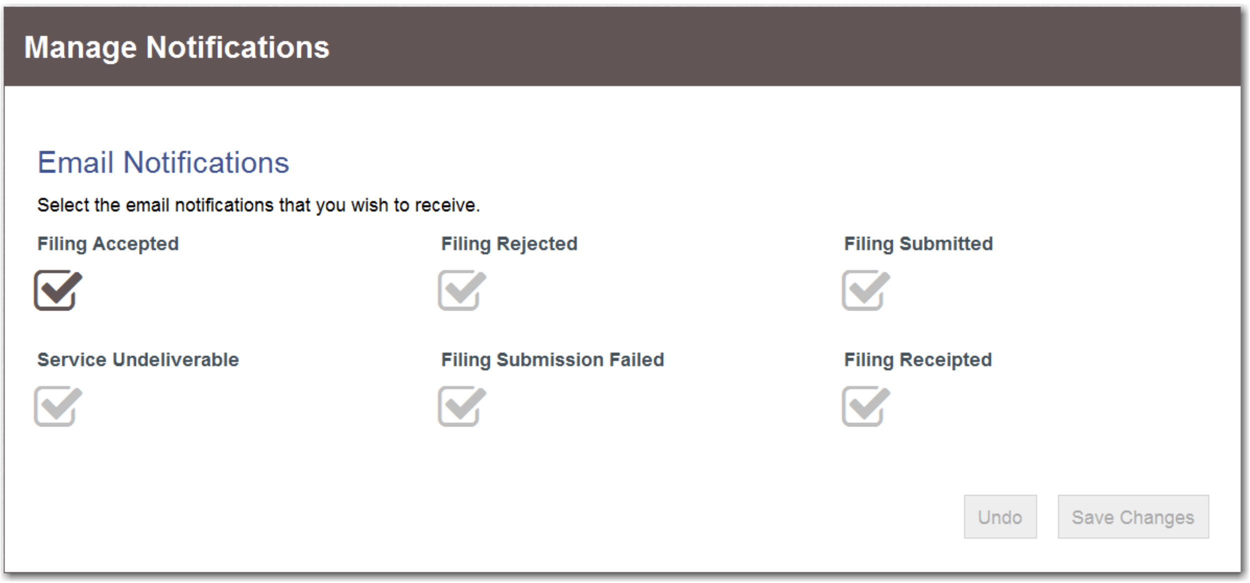
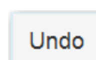


Figure 5.5 – Manage Notifications Page

2. Select the check boxes that correspond to the methods by which you want to be notified of filing information. The options that you can select include **Filing Accepted**, **Filing Rejected**, **Filing Submitted**, **Service Undeliverable**, **Filing Submission Failed**, and **Filing Receipted**.

3. Click 

to save your notification selection, or click 

to exit without changing your notification information.

6 Filer Dashboard

Topics covered in this chapter

♦ Dashboard Filing Category Descriptions

The *Filer Dashboard* page is the starting page for all filings. From here, you can start a new case, file into an existing case, and check the status of all filings that have been made.

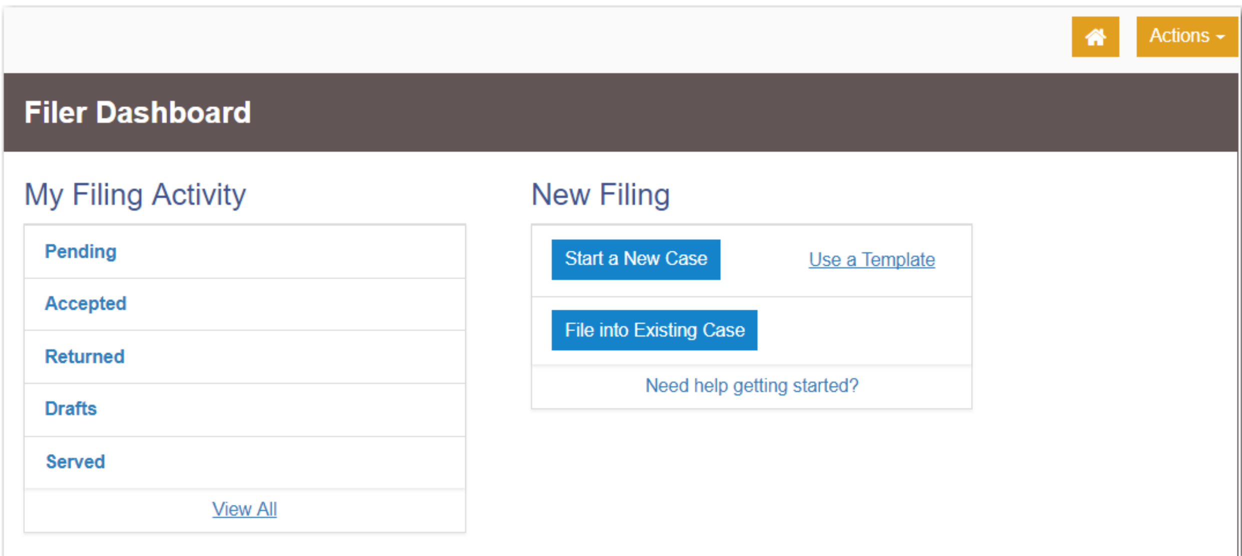


Figure 6.1 – Filer Dashboard Page

The home icon () next to the **Actions** drop-down list can be clicked from any page in the system to return to the *Filer Dashboard* page.

Dashboard Filing Category Descriptions

The status of all filings can be found in the **My Filing Activity** pane on the *Filer Dashboard* page.

The following table lists the status categories and their descriptions.

Filing Category	Description
Pending	Click to view envelopes that have been submitted and are being processed. Envelopes with a **Pending** status remain pending until there is some action from the court.
Accepted	Click to view envelopes that have been accepted by the court and are filed.
Returned	Click to view envelopes that have been returned from the court to be corrected.

Filing Category	Description
Drafts	Click to view envelopes that have not been submitted yet.
Served	Click to view envelopes that have service-only filings that have been delivered. Envelopes with a **Served** status have been delivered to the party.

7 Firm Administrator Functions

Topics covered in this chapter

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

Manage Firm Users

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

Approving and Removing New Users

After the person you invited to join your firm has registered, it is your responsibility as the Firm Administrator to either approve that user or remove the user from the firm.

To approve or remove new users for your firm, perform the following steps:

1. From the **Actions** drop-down list, select **Firm Users**.

   The *Firm Users* page is displayed. The page shows the list of users who are in your firm. The **Firm Status** column shows the user's firm approval status. One user in the list on the *Firm Users* page has not been approved by the Firm Administrator.

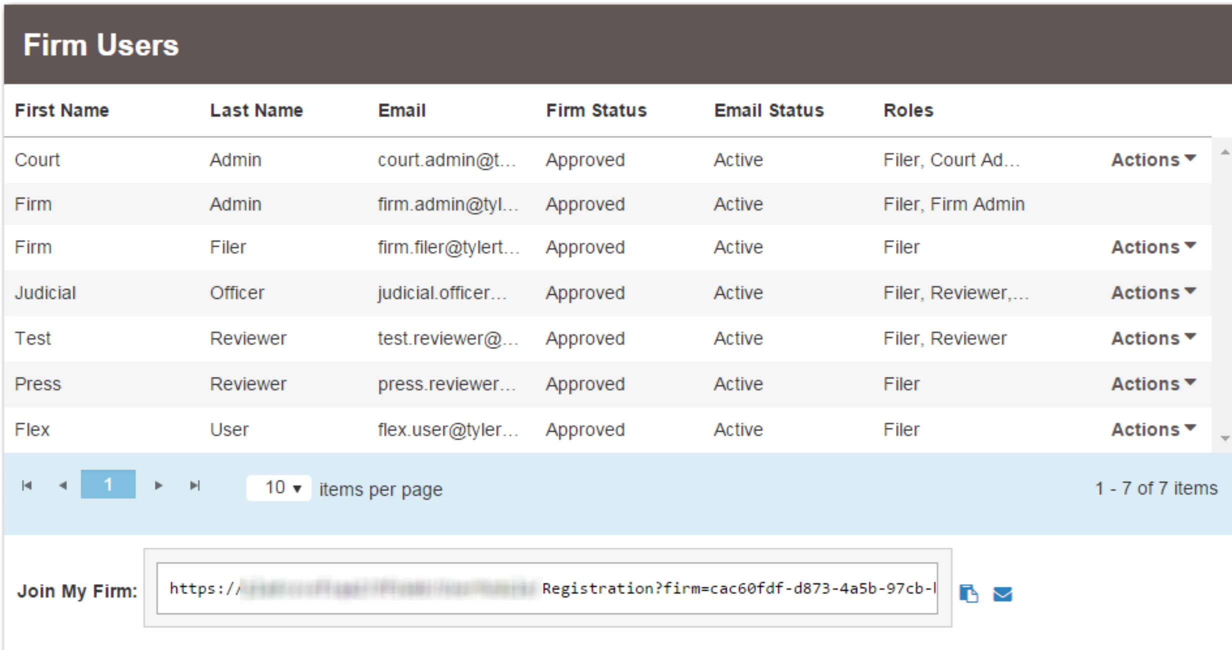


Figure 7.1 – Firm Users Page

2. Select the user from the list to approve or remove.
3. Verify that the user information is correct.
4. From the **Actions** drop-down list on the *Firm Users* page, select **Approve User** to approve the new user, or select **Remove Firm User** to remove the new user.

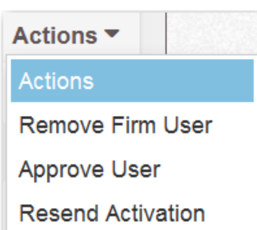


Figure 7.2 – Actions Drop-Down List for Firm Administrator

Assigning Roles to Firm Users

The Firm Administrator can assign roles to users in the firm.

Note: This section is intended for the Firm Administrator who is not handling criminal cases.

To assign roles to firm users, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Firm Users**.

   The *Firm Users* page is displayed.

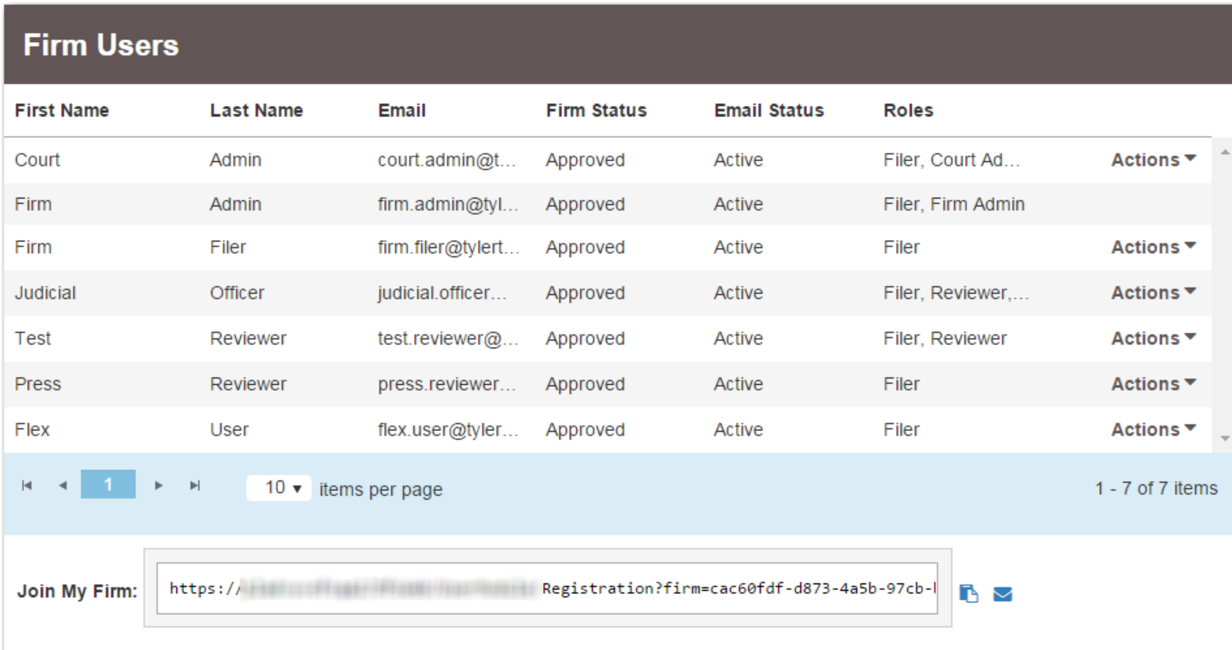


Figure 7.3 – Firm Users Page

2. Select a firm user from the list.

   The available roles for the specified user are displayed on the page.

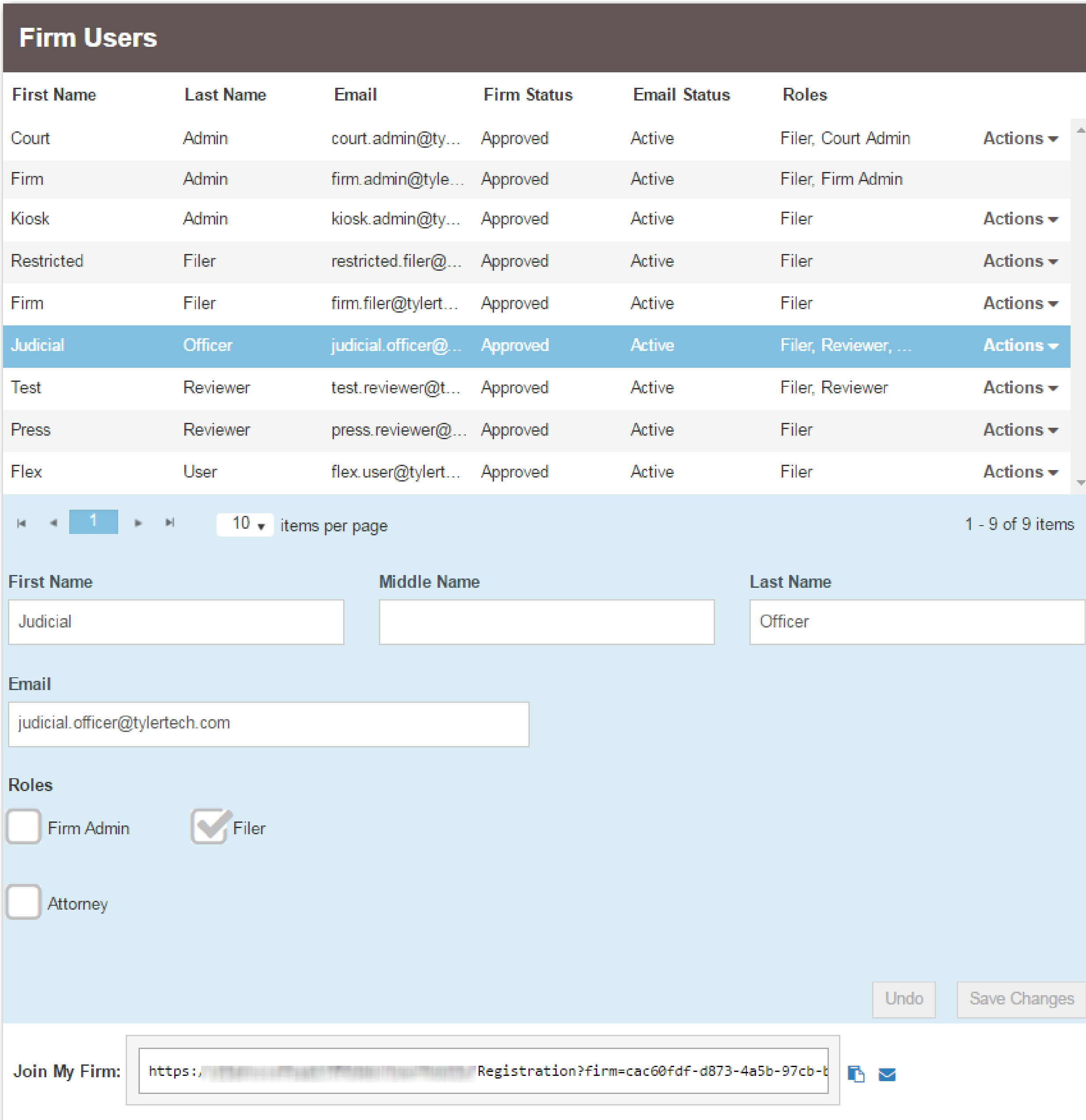


Figure 7.4 – Firm Users Page with Roles Displayed

3. Select the check boxes that correspond to the roles that you want to assign to the specified user.
4. Click **Save Changes** to save the changes, or click **Undo** to cancel the action.

The roles that you selected for the specified firm user have been granted to that user.

Assigning Criminal Filing Roles to Firm Users

The Criminal Filing Firm Administrator can assign roles to users in the firm.

Note: This section is intended for the Criminal Filing Firm Administrator. You must have the Criminal Filing Firm Admin role assigned to you before you can assign criminal filing roles to firm users.

To assign roles to firm users, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Firm Users**.

   The *Firm Users* page is displayed.

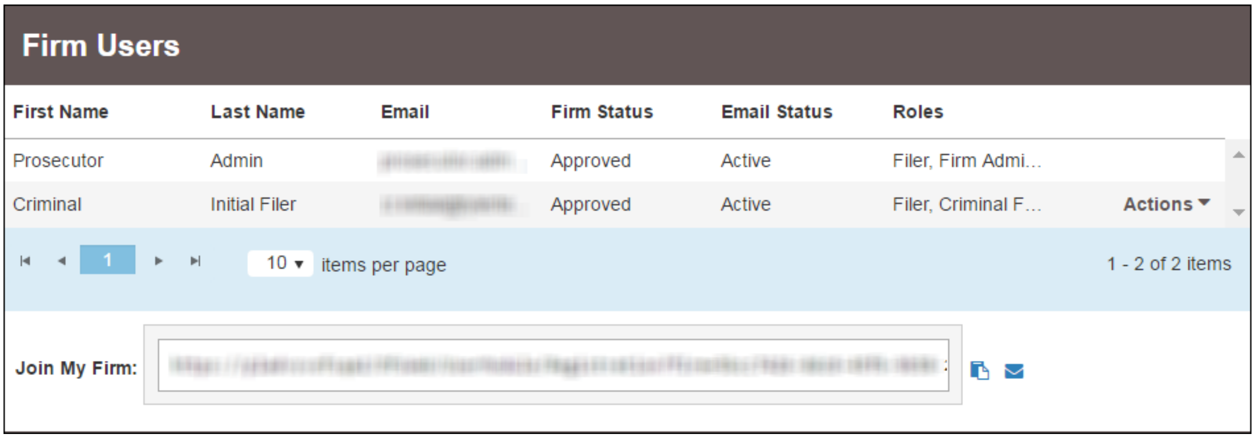


Figure 7.5 – Firm Users Page

2. Select a firm user from the list.

   The available roles for the specified user are displayed on the page.

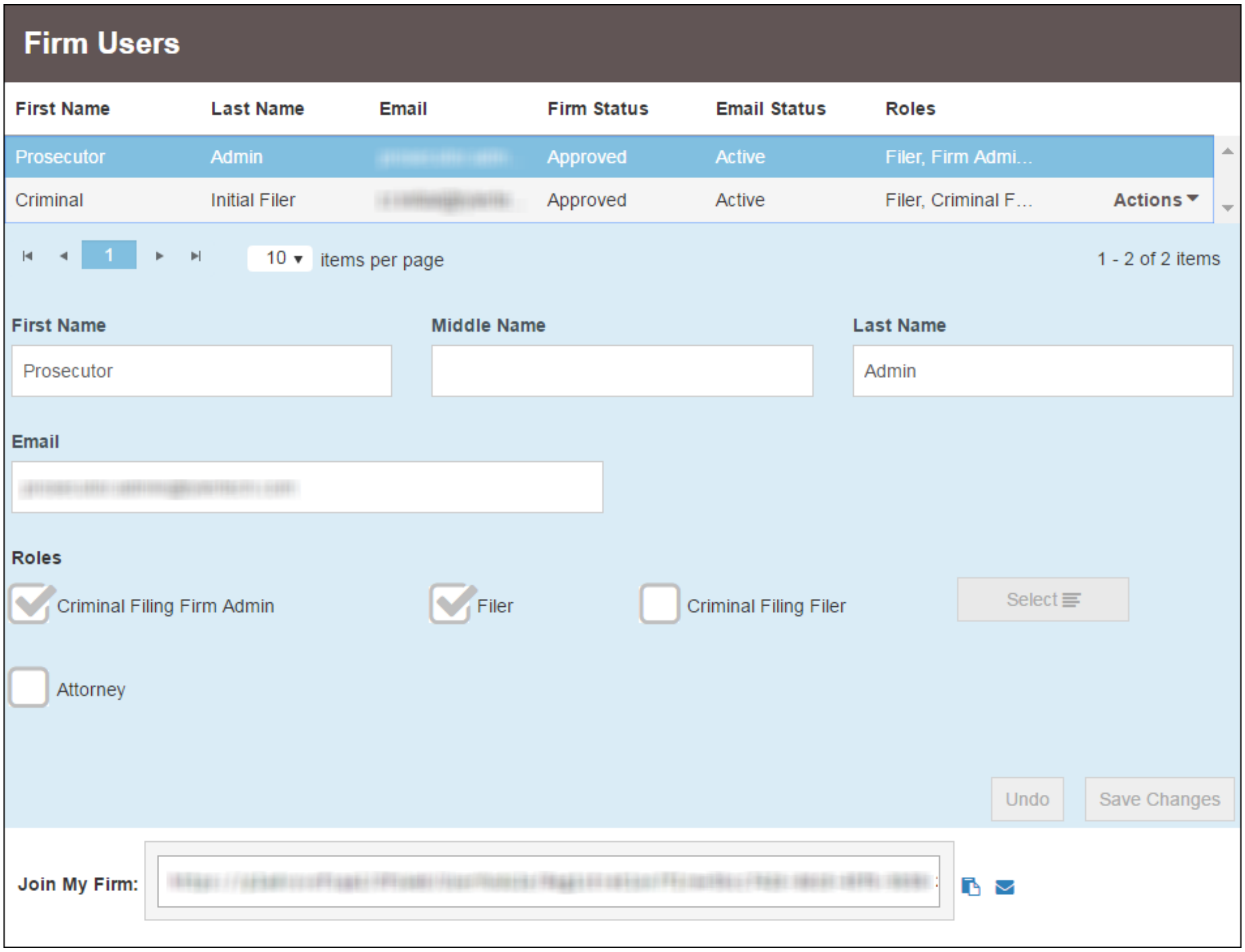


Figure 7.6 – Firm Users Page with Roles Displayed

3. Select the check boxes that correspond to the roles that you want to assign to the specified user.

   When you select the Criminal Filing Filer role, the *Select Locations* window is displayed.

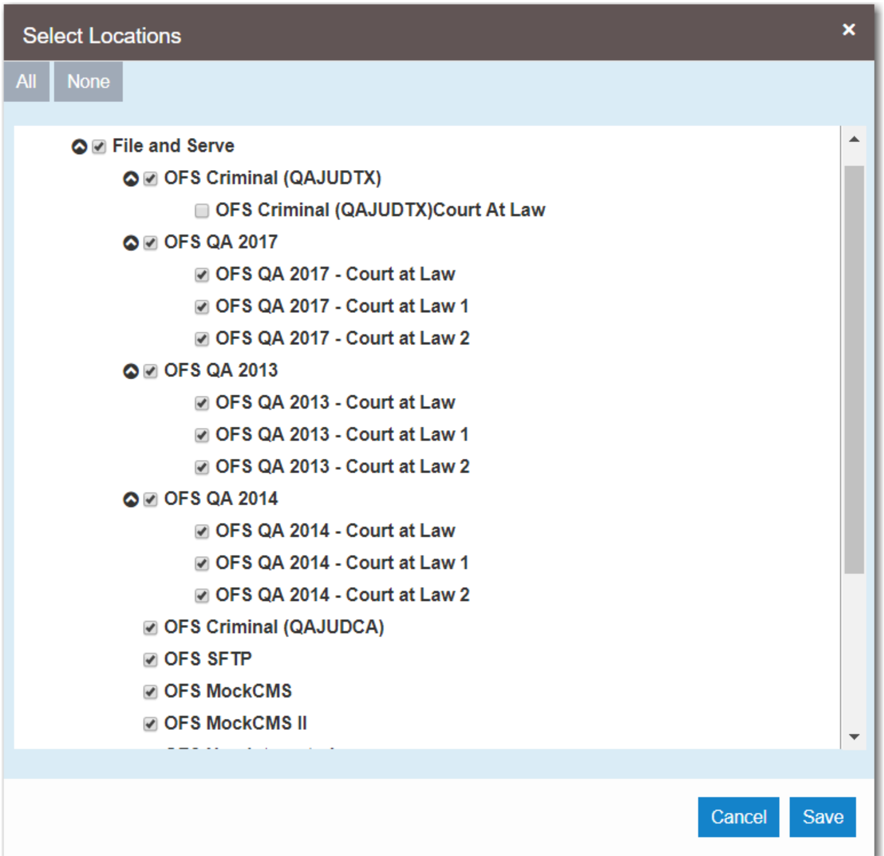


Figure 7.7 – Select Locations Window

4. Select the locations where you want the Criminal Filing Filer role to be assigned, and then click **Save**.

   Note: If you later want to change the locations where a Criminal Filing Filer is assigned, click Select on the *Firm Users* page. This action opens the *Select Locations* window where you can make the appropriate changes.

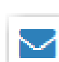
5. Click **Save Changes** to save the changes, or click **Undo** to cancel the action.

The roles that you selected for the specified firm user have been granted to that user.

Inviting Firm Users to Create an Account

The Firm Administrator is responsible for inviting firm users to create an account and join the firm.

To invite firm users to create an account and join the firm, perform the following steps:

1. From the *Firm Users* page, click either  or .

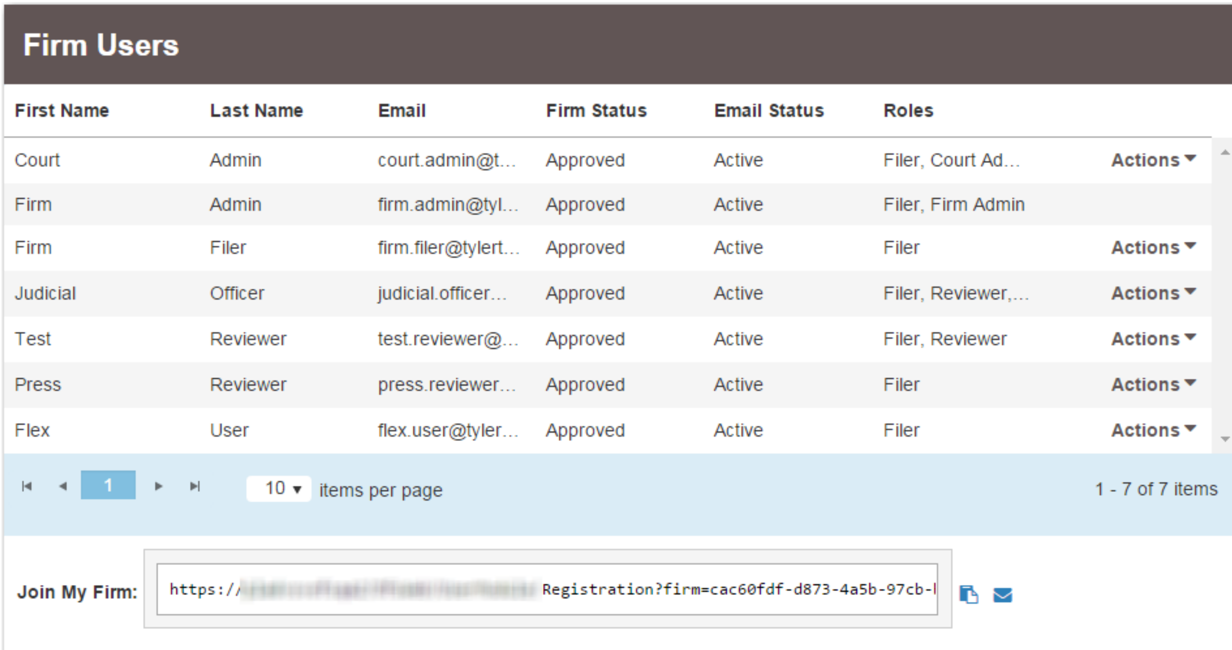
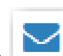


Figure 7.8 – Firm Users Page

2. If you clicked , paste the invitation link in the body of an email. If you clicked , a new email message from your email client is displayed with the invitation link included in the body of the email. From here, type the email address of the recipient, and then click **Send**.

   The invitation email will be sent to the specified recipient. The URL in the email is specific to the Firm Administrator's law firm.

Firm Users Create Account

Users can create an account with a firm after being invited to join the firm. This section describes what firm users experience when they create an account.

When users are invited to join a firm, they receive that invitation in an email. After clicking the link in the email, they are directed to the following page.

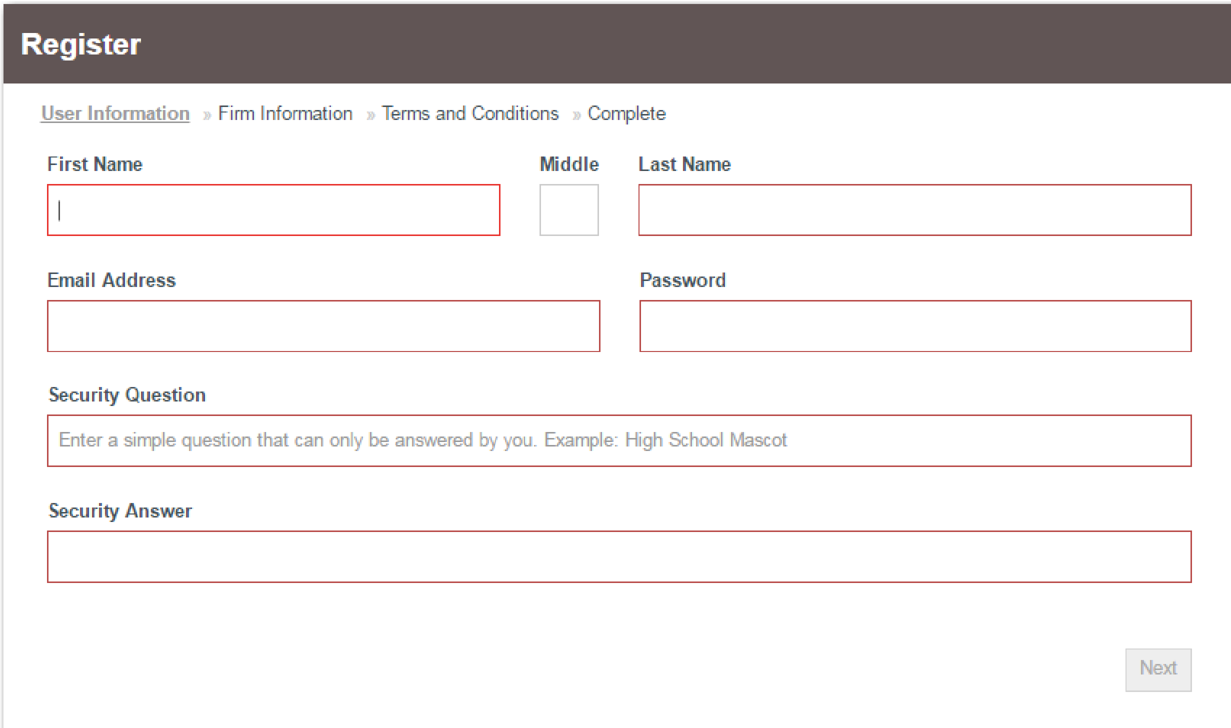


Figure 7.9 – Register Page for Firm User

Next, users are directed to a page that shows the law firm name, address, and phone number.

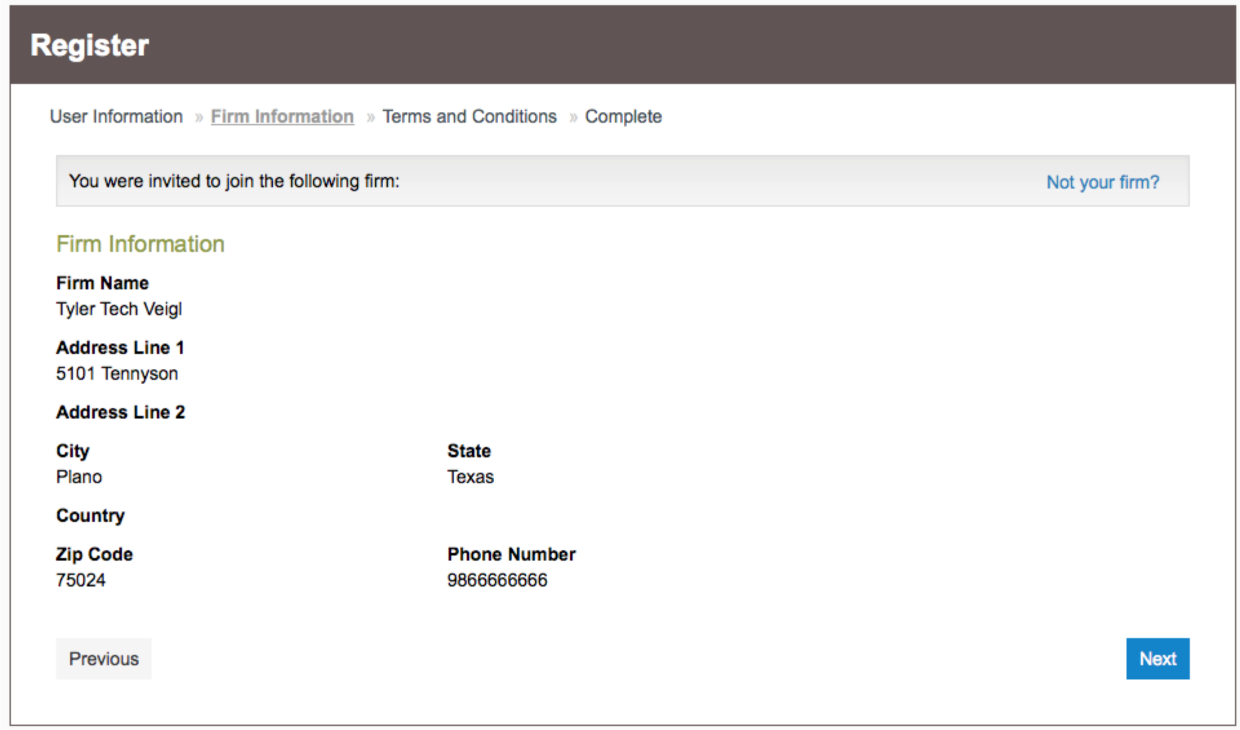


Figure 7.10 – Register Page with Firm Information

Users must read and agree to the following registration agreement.

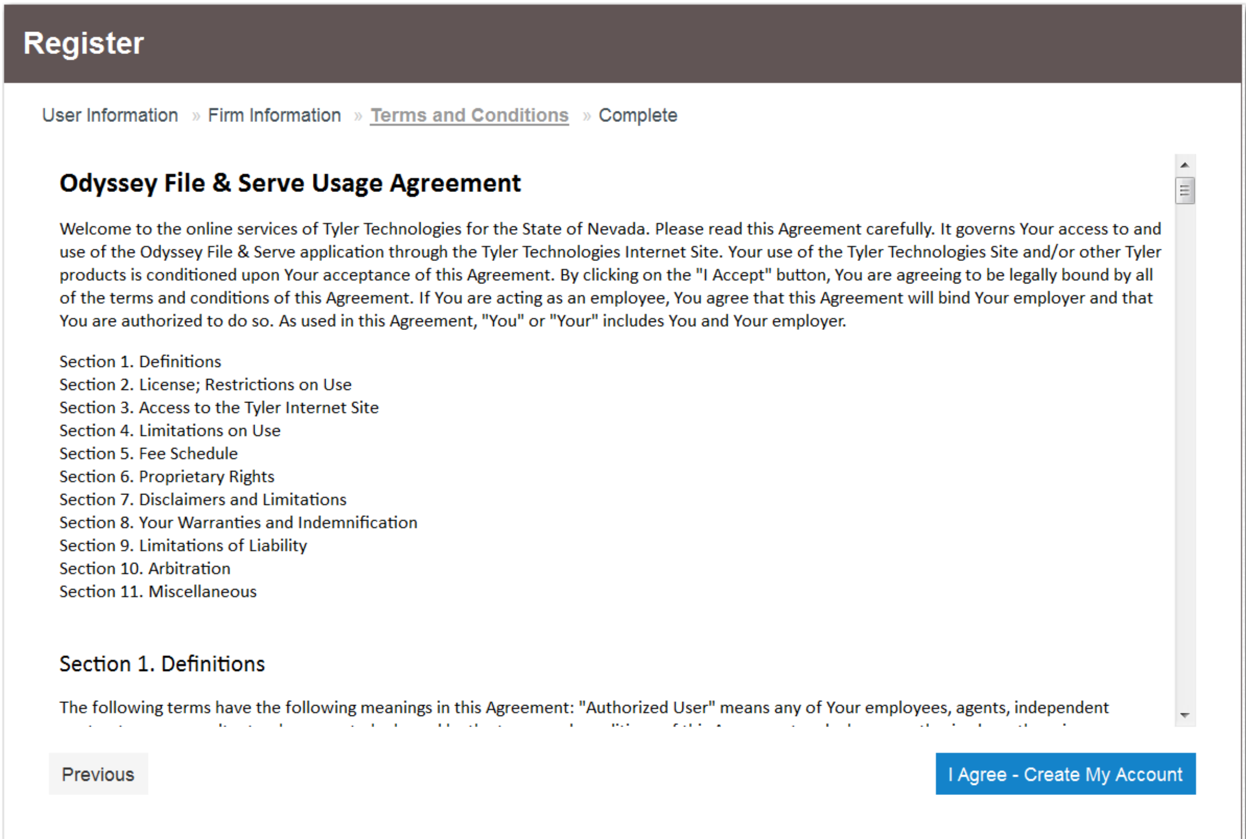


Figure 7.11 – Register Page with Usage Agreement

A confirmation page that shows the law firm name and email address is displayed.

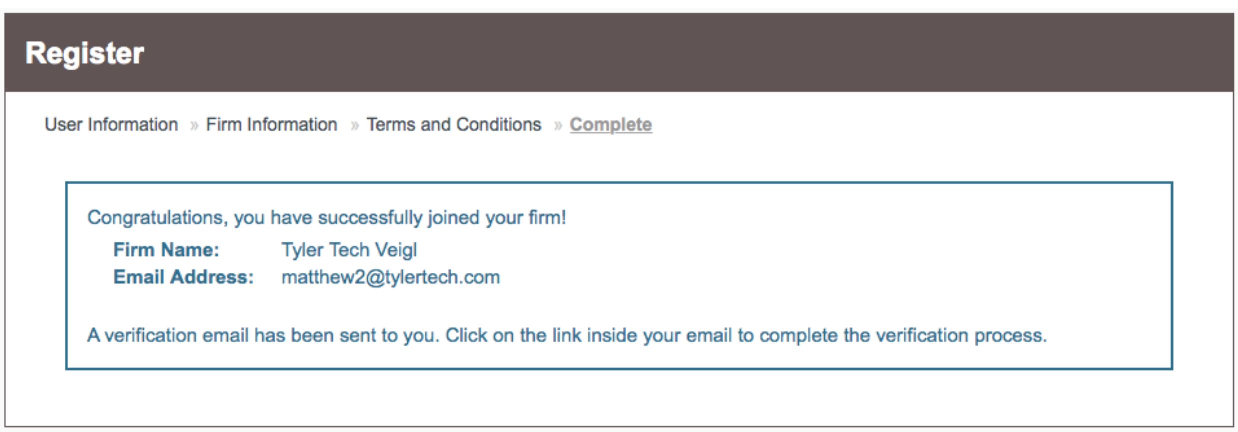


Figure 7.12 – Register Page with Confirmation for Invited Firm User

Editing Firm Users

The Firm Administrator can edit firm users.

Perform the following steps to edit a firm user's information:

1. From the *Firm Users* page, select from the list the name of the user you want to edit.

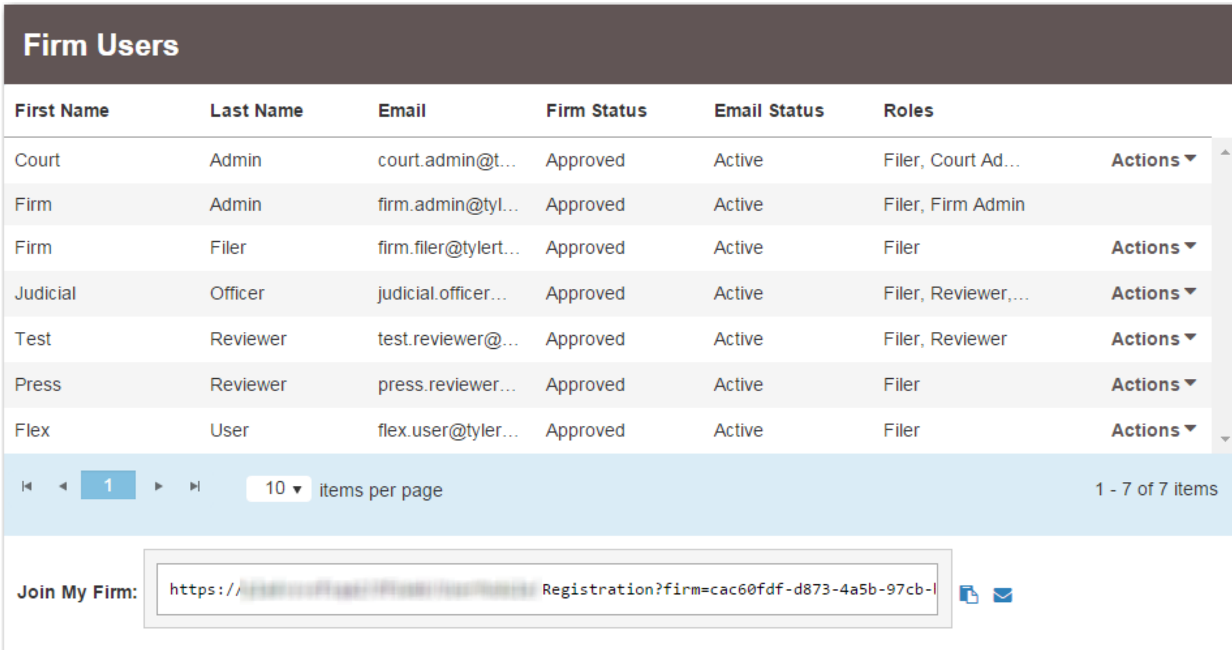


Figure 7.13 – Firm Users Page

2. Edit the user information as desired.
3. Click **Save Changes** to save the changes, or click **Undo** to cancel the action.

Removing a Firm User

The Firm Administrator can remove a firm user.

Perform the following steps to remove a firm user:

1. From the *Firm Users* page, click the **Actions** drop-down list in the firm user's row for the user you want to remove.

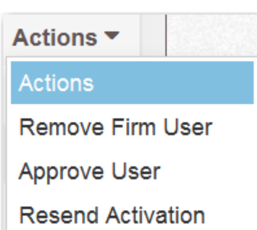


Figure 7.14 – Actions Drop-Down List

2. Select **Remove Firm User**.

   A verification message is displayed indicating that the user was successfully removed from the firm.

Resending the Activation Email

This feature allows the Firm Administrator to resend the activation email for a selected user account. Use this feature in situations where the user did not receive the initial activation email or the email address must be corrected to activate the user account. This feature is only available if the user's email status is unverified.

Complete the following steps to resend the activation email to the user:

1. From the *Firm Users* page, click the **Actions** drop-down list in the row of the user to whom the activation email must be resent.

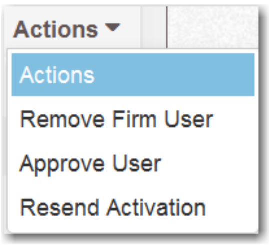


Figure 7.15 – Actions Drop-Down List

2. Select **Resend Activation**.

   Users will receive another activation email.

3. Instruct users to check for an email with the account activation information.

Linking a Firm Attorney to a Firm User (Firm Administrator)

Note: This section is intended for the Firm Administrator who is not handling criminal cases.

To link a firm attorney to a firm user, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Firm Users**.

   The *Firm Users* page is displayed.

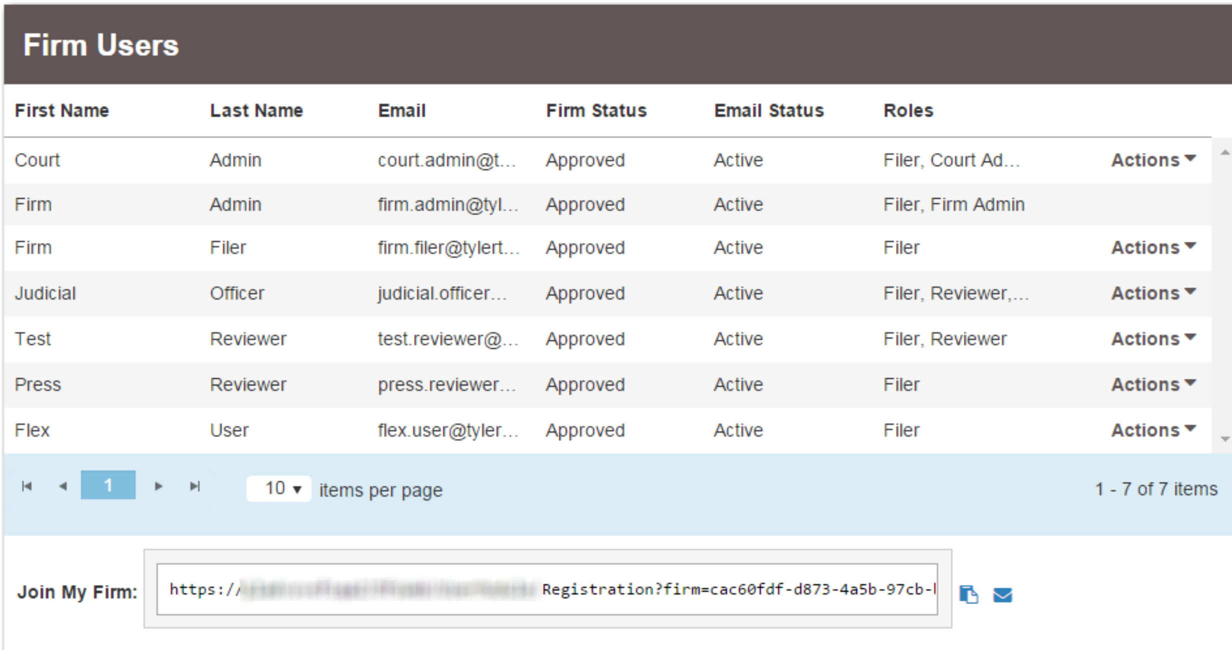


Figure 7.16 – Firm Users Page

2. Select a firm user.

   The available roles for the specified user are displayed on the page.

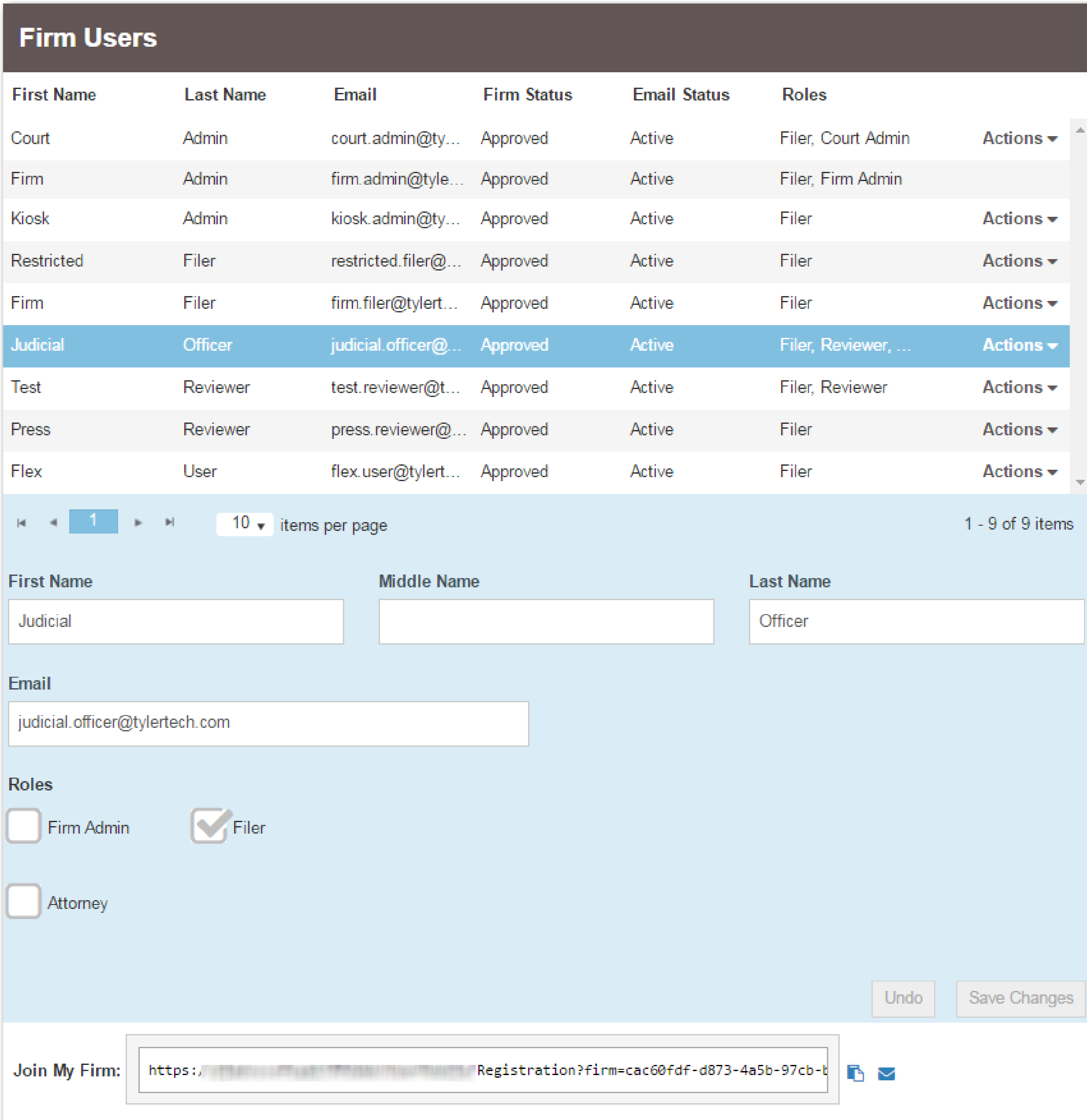


Figure 7.17 – Firm Users Page with Roles Displayed

3. To select the attorney that you want to link to the specified user, select the **Attorney** check box.

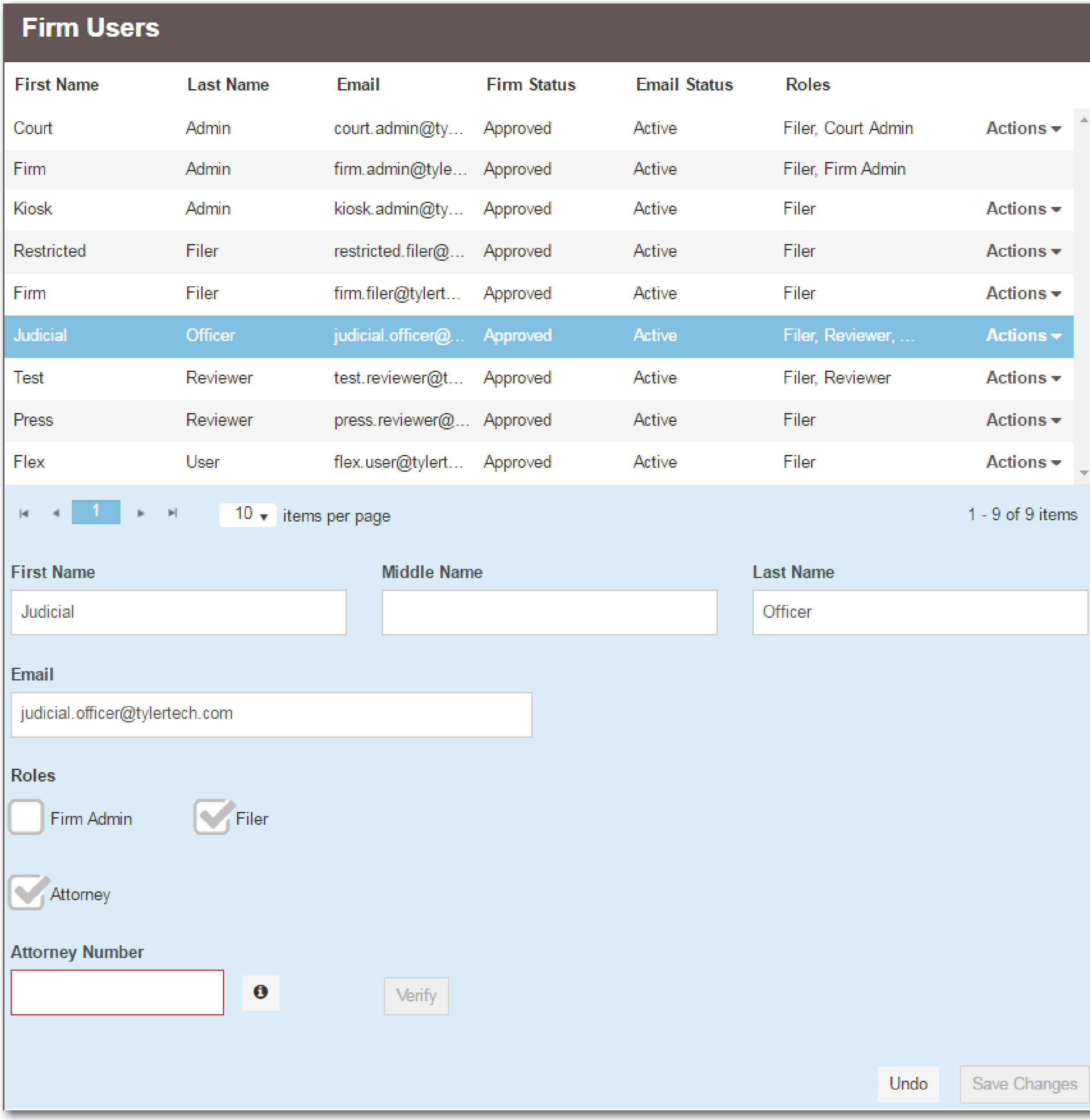


Figure 7.18 – Firm Users Page with Attorney Check Box Selected

4. Type the number of the attorney that you want to link to the firm user in the **Attorney Number** field, and then click Verify.

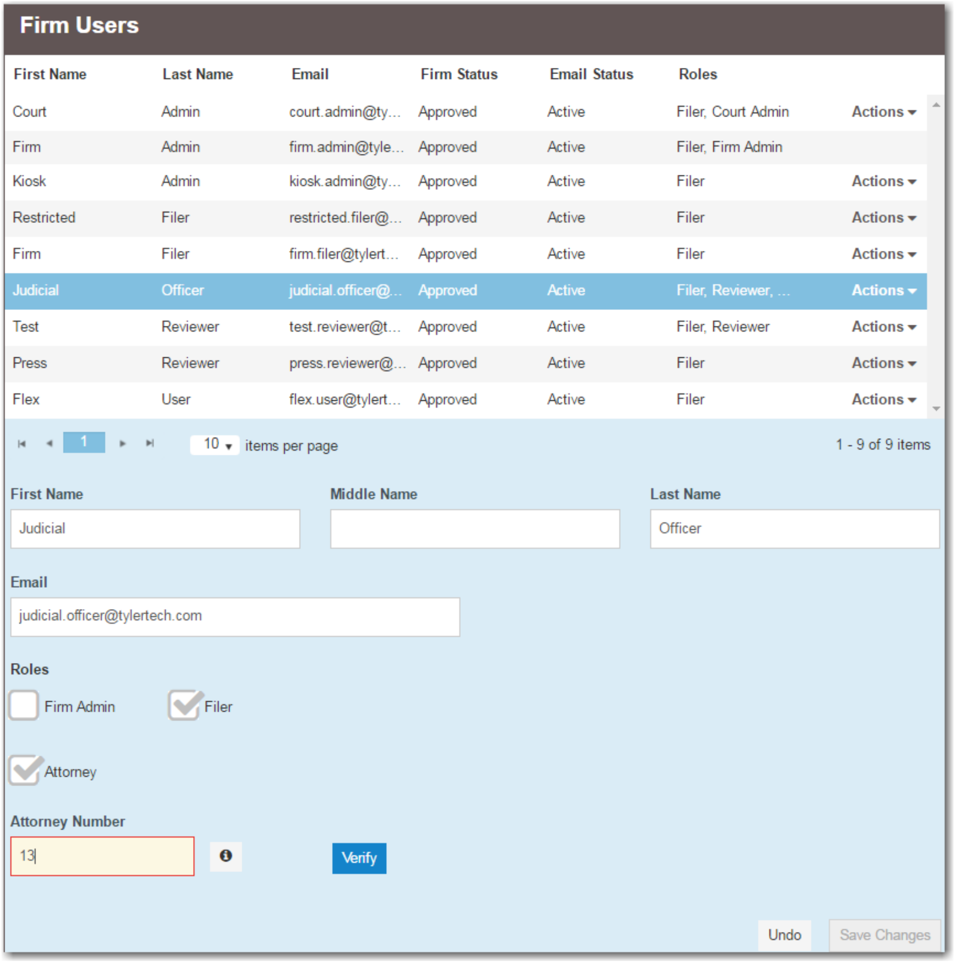


Figure 7.19 – Firm Users Page with an Attorney Number in the Attorney Number Field

If you typed a valid attorney number, the *Verify Attorney Number* dialog box is displayed.

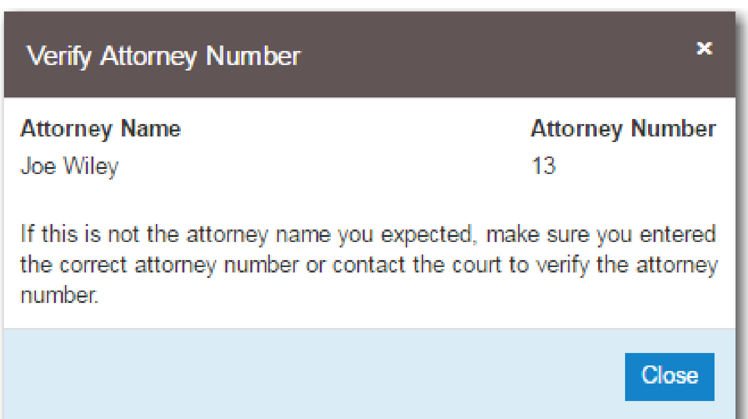


Figure 7.20 – Verify Attorney Number Dialog Box

Note: If you typed an invalid attorney number, the following error message is displayed: `Error: Invalid Attorney Number`.

5. Click **Close** to close the *Verify Attorney Number* dialog box, and then click **Save Changes**.

Linking a Firm Attorney to a Firm User (Criminal Filing Firm Administrator)

Note: This section is intended for the Criminal Filing Firm Administrator.

To link a firm attorney to a firm user, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Firm Users**.

   The *Firm Users* page is displayed.

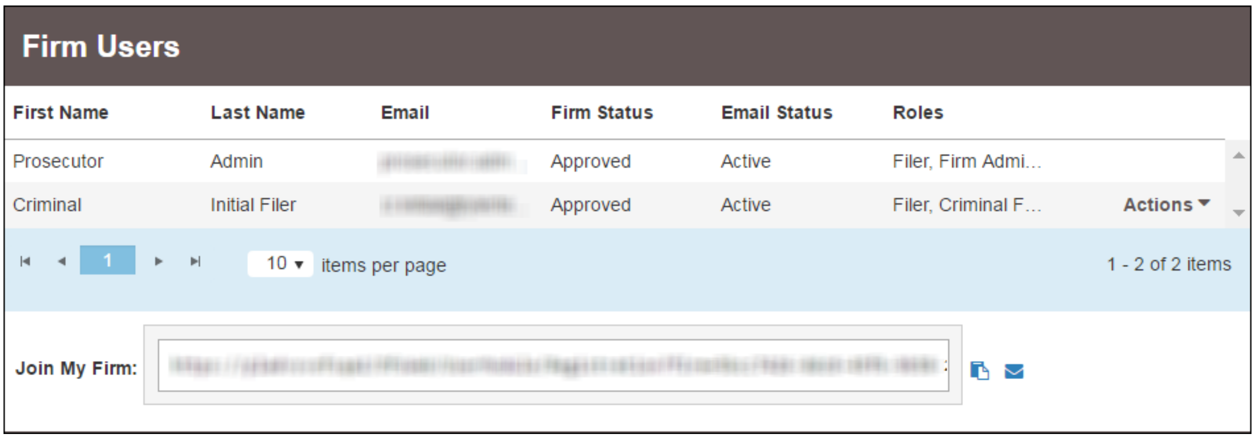


Figure 7.21 – Firm Users Page

2. Select a firm user.

   The available roles for the specified user are displayed on the page.

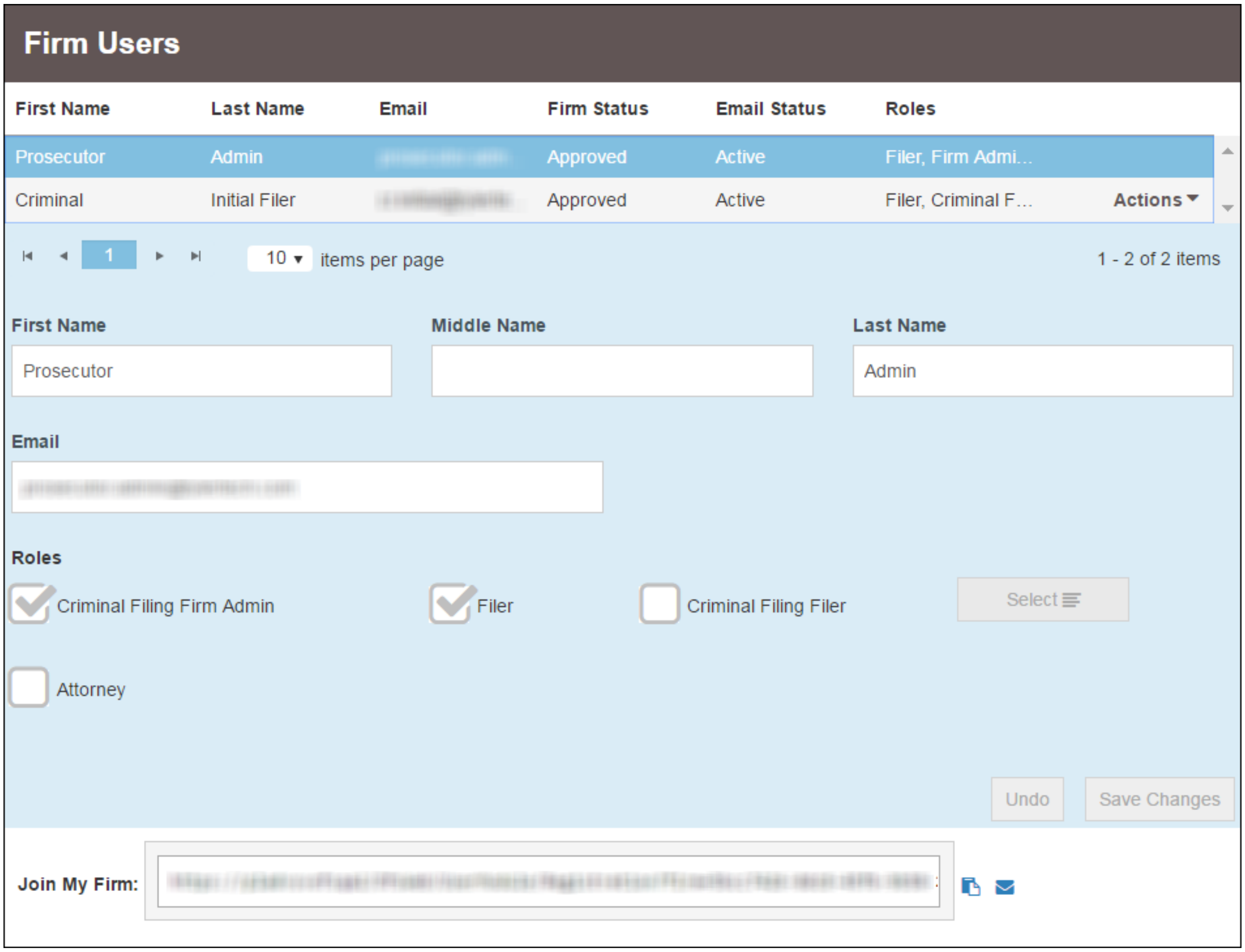


Figure 7.22 – Firm Users Page with Roles Displayed

3. To select the attorney that you want to link to the specified user, select the **Attorney** check box.

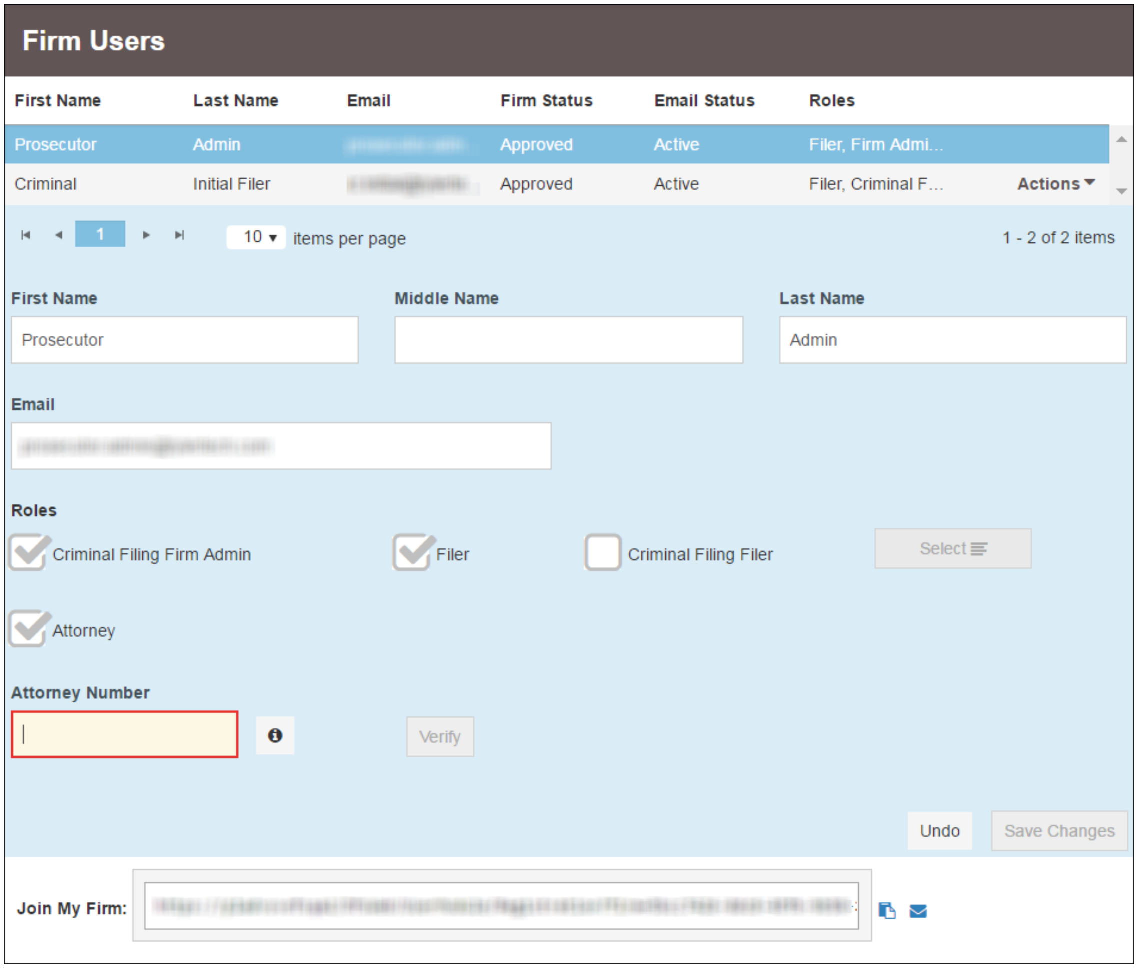


Figure 7.23 – Firm Users Page with Attorney Check Box Selected

4. Type the number of the attorney that you want to link to the firm user in the **Attorney Number** field, and then click 

.

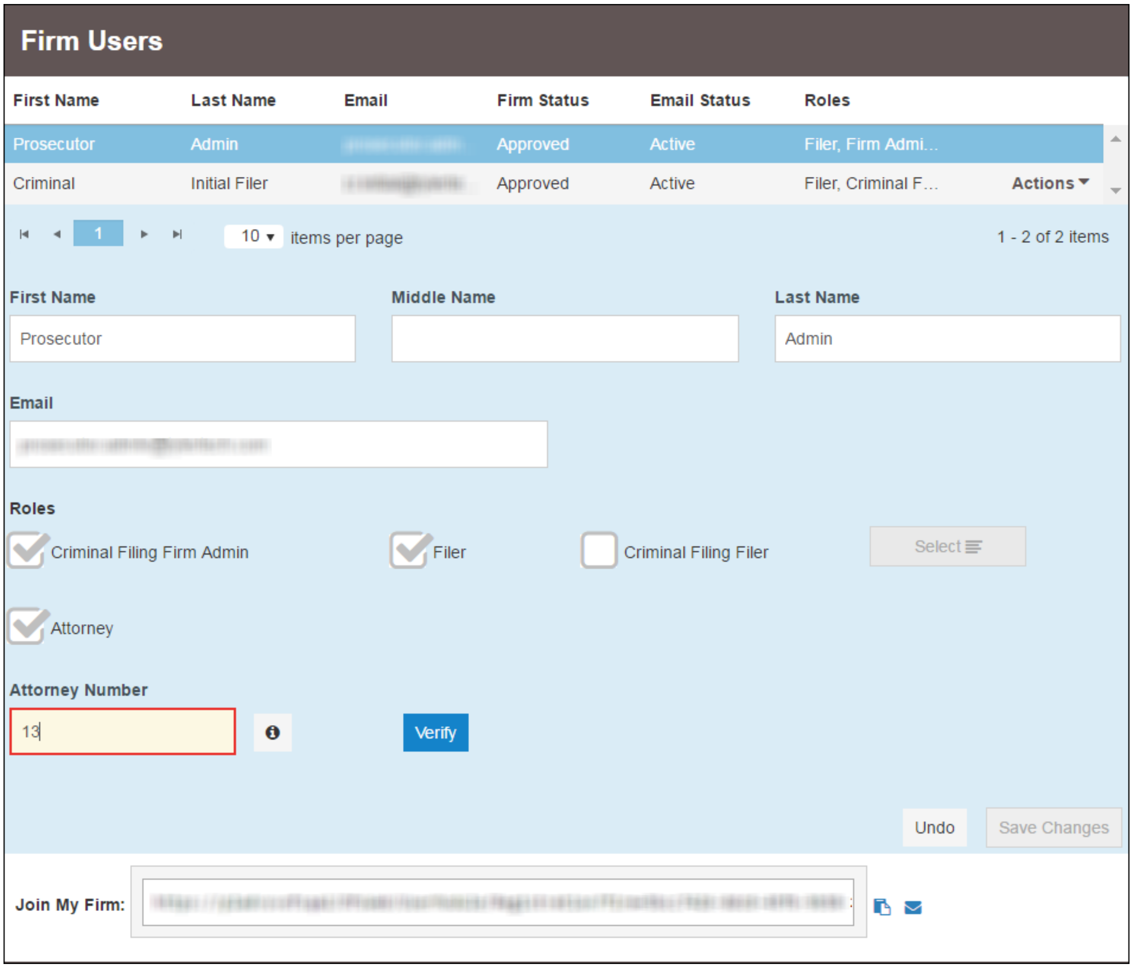


Figure 7.24 – Firm Users Page with an Attorney Number in the Attorney Number Field

If you typed a valid attorney number, the *Verify Attorney Number* dialog box is displayed.

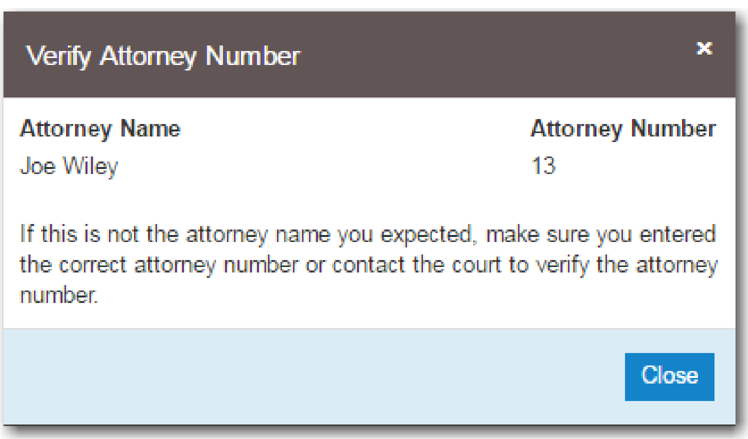


Figure 7.25 – Verify Attorney Number Dialog Box

Note: If you typed an invalid attorney number, the following error message is displayed: `Error: Invalid Attorney Number`.

5. Click **Close** to close the *Verify Attorney Number* dialog box, and then click **Save Changes**.

Manage Attorneys

The Firm Administrator is responsible for managing firm attorneys.

Adding Attorneys

The Firm Administrator can add attorneys to the firm's attorney list.

To add an attorney to the list, perform the following steps:

1. From the **Actions** drop-down list, select **Firm Attorneys**.

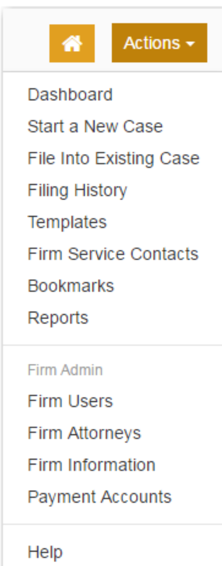


Figure 7.26 – Actions Drop-Down List

The *Firm Attorneys* page is displayed.

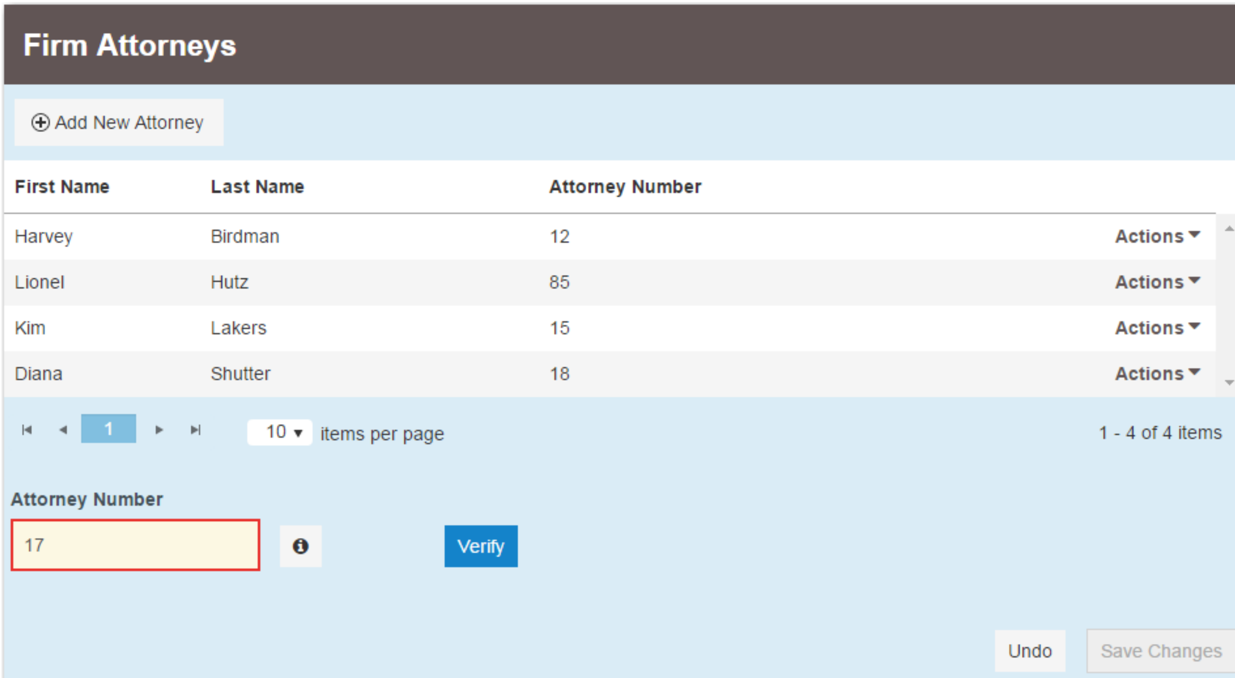


Figure 7.27 – Firm Attorneys Page

2. Click Add New Attorney.

3. Type the attorney's number in the **Attorney Number** field, and then click Verify.

   The attorney number that you entered is verified against the database. If the number is correct, the attorney's name is displayed, and you can add that attorney to the firm's attorney list.

4. Click Save Changes to save the changes, or click Undo to cancel the action.

   If you saved your changes, the system sends a verification message that the attorney was added to your firm.

Removing an Attorney's Account

The Firm Administrator can remove an attorney from the *Firm Attorneys* page.

To remove an attorney, perform the following steps:

1. From the **Actions** drop-down list, select **Firm Attorneys**.

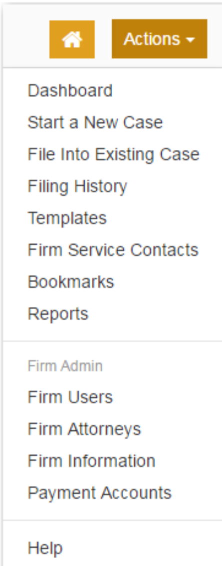


Figure 7.28 – Actions Drop-Down List

The *Firm Attorneys* page is displayed.

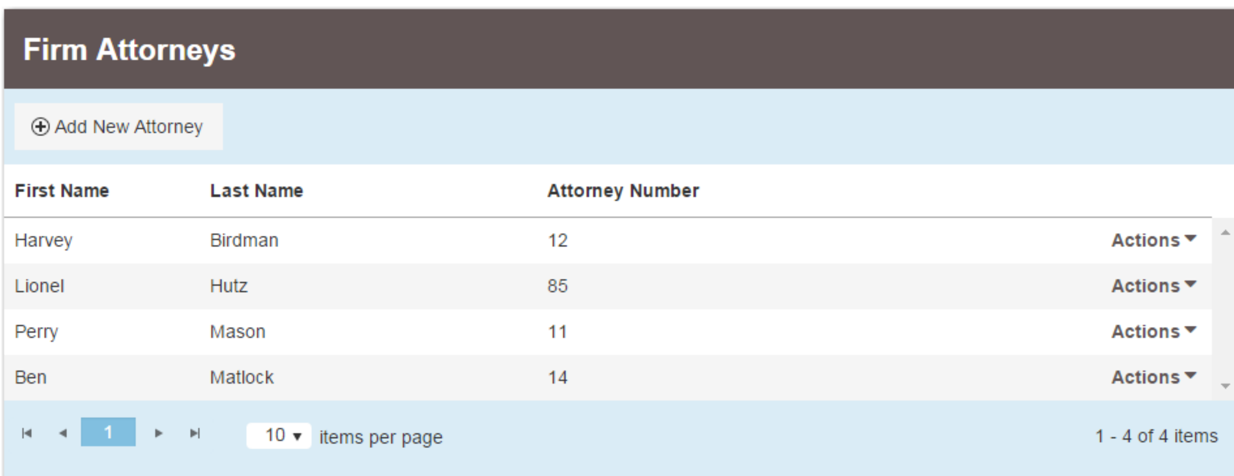


Figure 7.29 – Firm Attorneys Page

2. On the *Firm Attorneys* page, locate the attorney that you want to remove from the list.
3. From the attorney **Actions** drop-down list, select **Remove Attorney**.

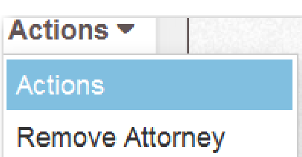


Figure 7.30 – Attorney Actions Drop-Down List

The system sends a verification message that the attorney was removed from the firm.

Manage Payment Accounts

The Firm Administrator is responsible for managing payment accounts. Firms can have multiple payment accounts if needed. Credit cards, electronic checks, and draw down accounts are valid forms of payment for filing fees.

Note: Draw down accounts are configured by Tyler and may not be available on your system.

Adding Payment Accounts

The system requires all firms to have a payment account. The Firm Administrator adds payment accounts for the firm.

To add payment accounts for your firm, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Payment Accounts**.

   The *Payment Accounts* page is displayed.

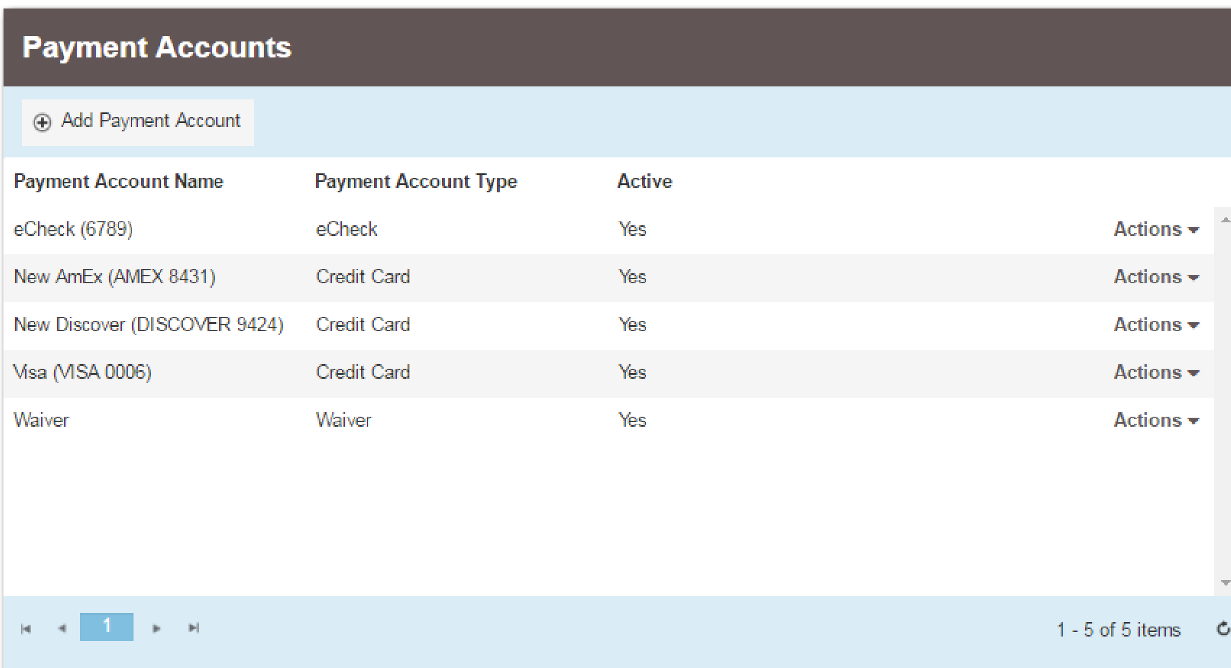
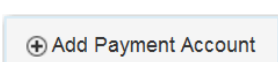


Figure 7.31 – Payment Accounts Page

2. Click 

to add a new payment account.

   The *Payment Accounts* page expands with additional fields for adding a new payment account, and the cursor moves down the page to the **Payment Account Name** field.

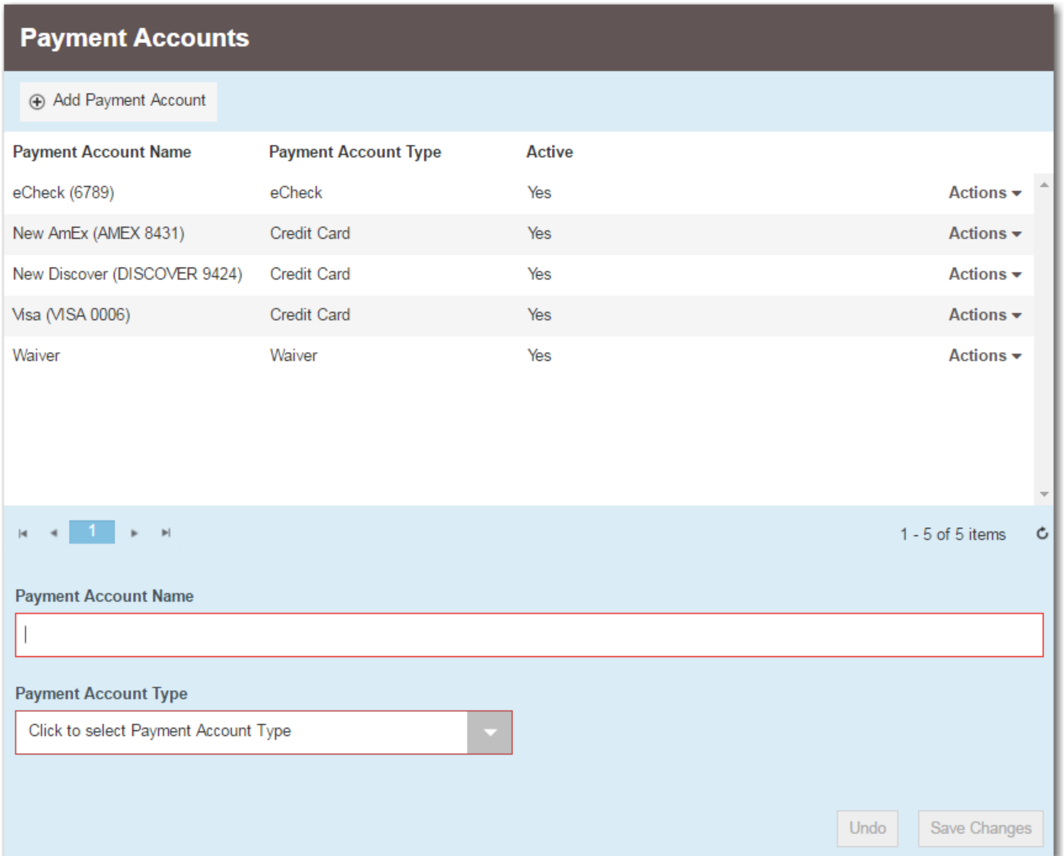


Figure 7.32 – Payment Accounts Page for Adding a New Payment Account

3. Type the name that you want to assign to the payment account in the **Payment Account Name** field.
4. From the **Payment Account Type** drop-down list, select the type of payment account that you want to add.
5. Follow the prompts for the type of payment account that you are adding.

   Note: The prompts and screens vary, depending on the type of payment account that you are adding. For credit cards and eChecks, you must provide additional information on a separate page. For draw down accounts, you must select the locations where the accounts will be valid. For cash accounts, you must select the Active check box that is displayed. If you select Waiver, no additional information is required.

   Note: Draw down accounts are configured by Tyler and may not be available on your system.

6. Click Save Changes to save your payment account information, or click Undo to exit without adding a payment account.

Deleting a Payment Account

The Firm Administrator is responsible for deleting payment accounts.

Perform the following steps to delete a firm payment account:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Payment Accounts**.

The *Payment Accounts* page is displayed.

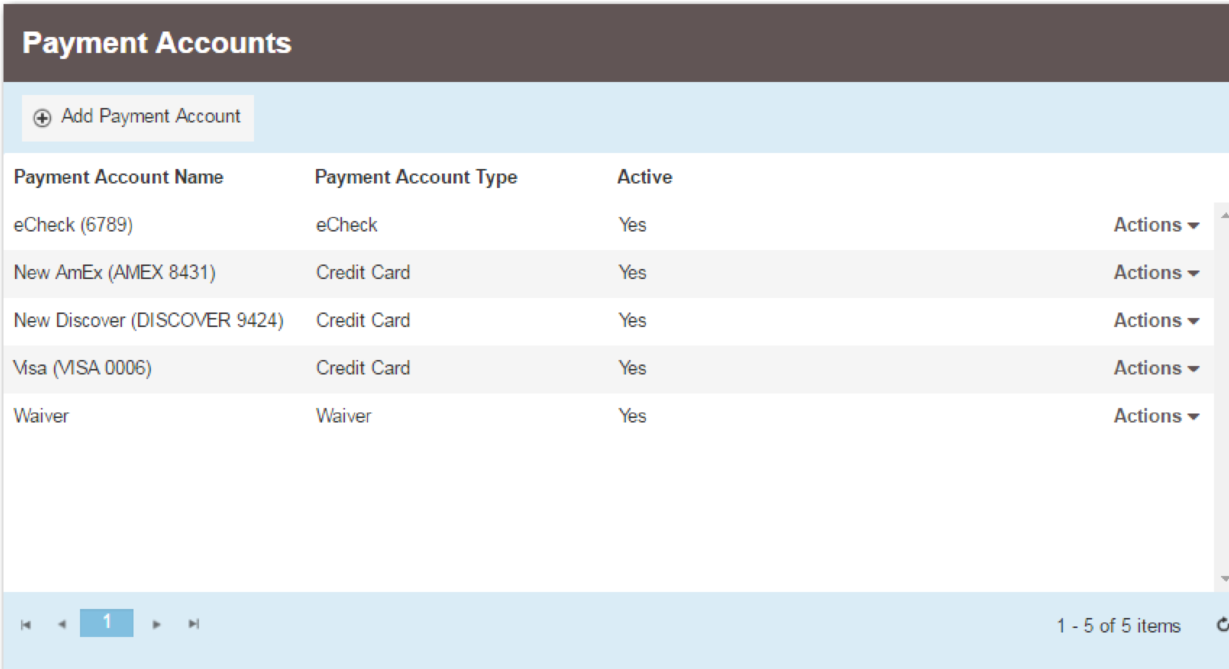


Figure 7.33 – Payment Accounts Page

2. Select the firm payment account that you want to delete.
3. From the payment account **Actions** drop-down list, click **Delete**.

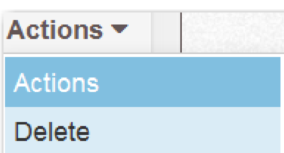


Figure 7.34 – Actions Drop-Down List

The system sends a verification message that the payment account was successfully deleted.

Editing Payment Accounts

Once a payment account has been entered, only the payment account name can be changed. You cannot edit credit card information after it has been entered. Instead, delete the payment account and add a new one.

To edit firm payment accounts, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Payment Accounts**.

   The *Payment Accounts* page is displayed.

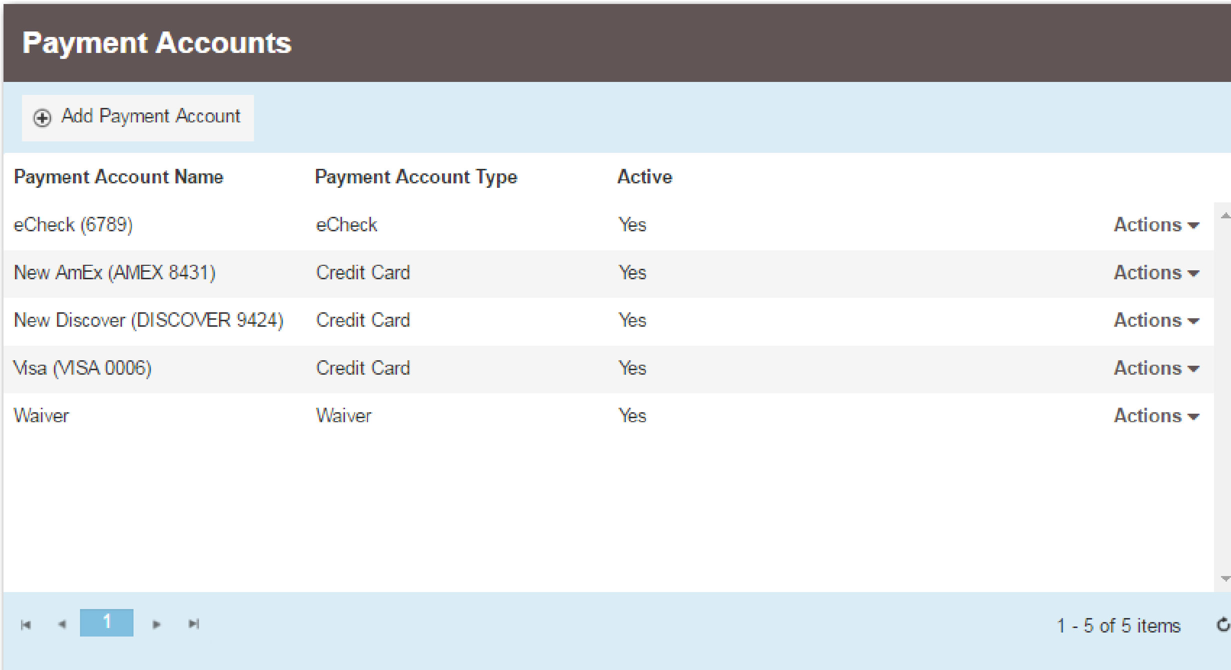


Figure 7.35 – Payment Accounts Page

2. Select the firm payment account that you want to edit.

   The payment account information is displayed.

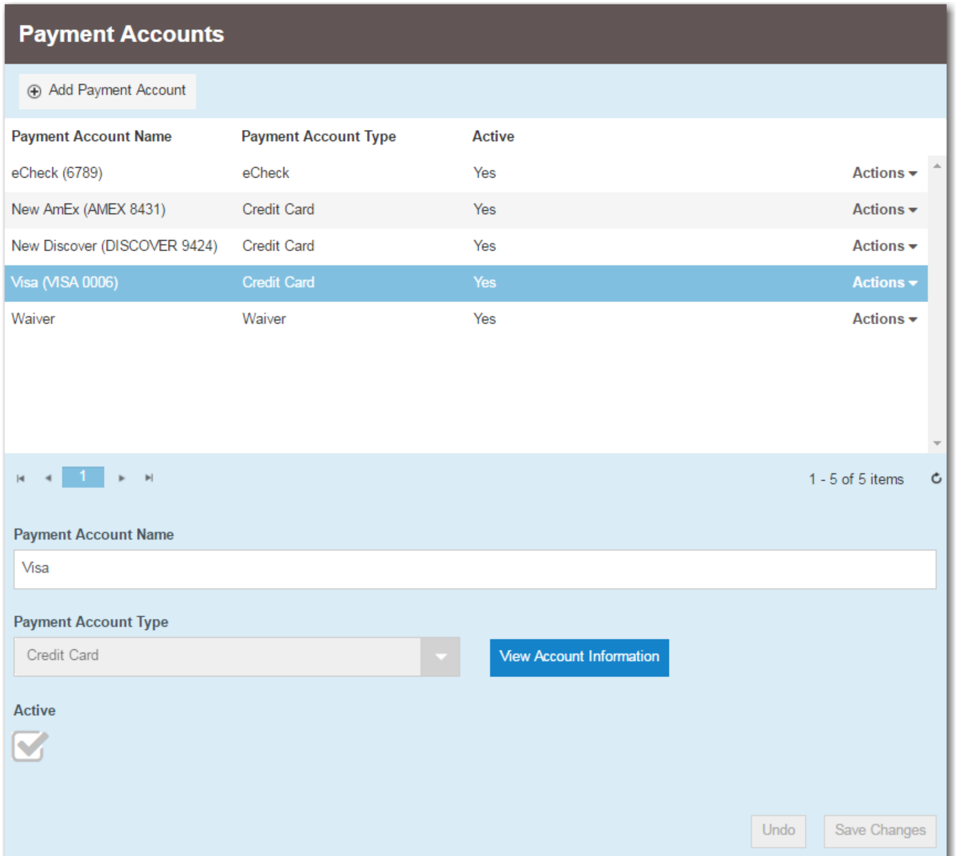


Figure 7.36 – Payment Accounts Page – Edit Payment Account

3. Perform the edits that you want to make.
4. Click **Save Changes** to save the changes and continue, or click **Undo** to cancel the action.

Unavailable Payment Accounts

During a filing, if any payment account is unavailable, the system notifies you that you are trying to use an invalid account.

A blue link is displayed after the **Payment Account** field. The link contains the following phrase: `View Unavailable Payment Accounts`.

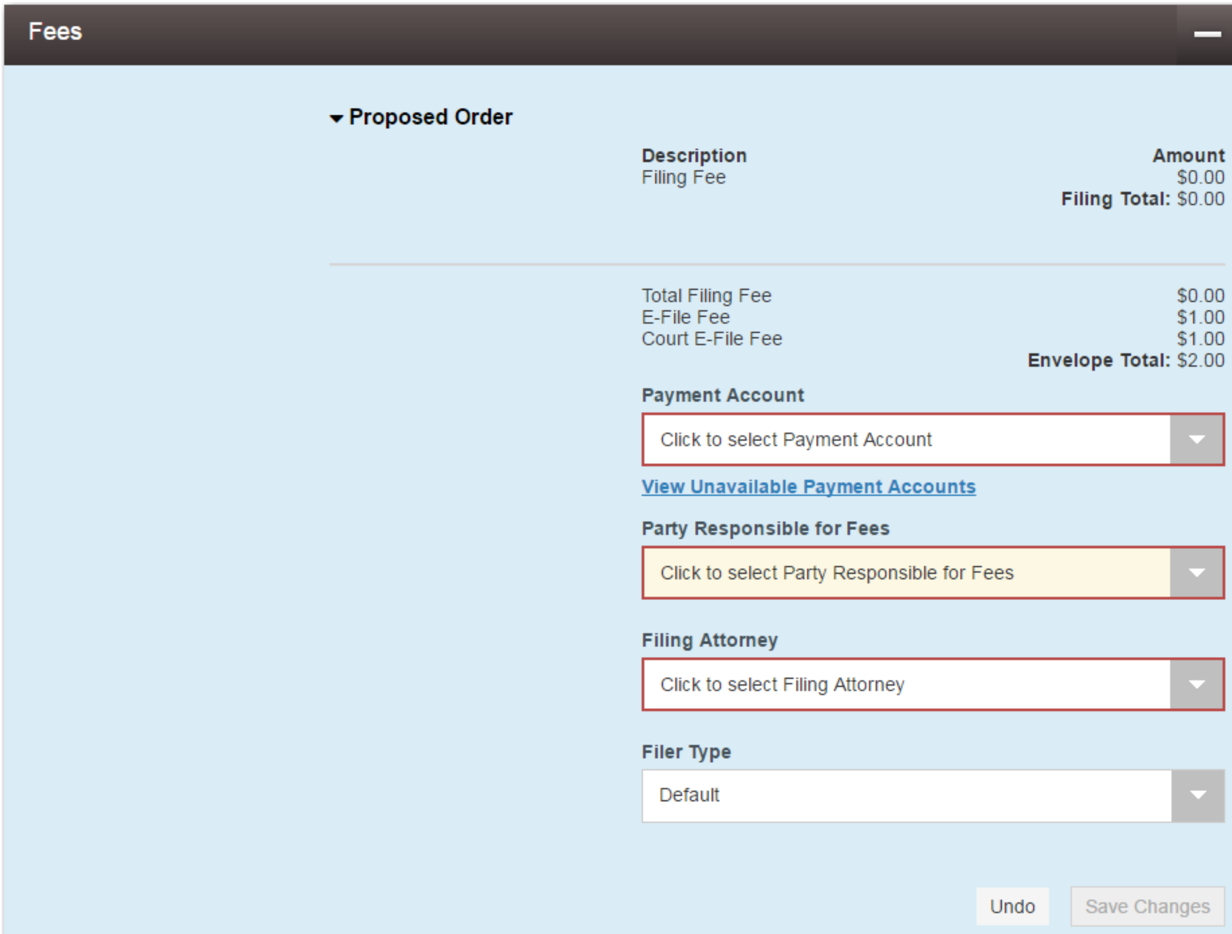


Figure 7.37 – Error Message Regarding Payment Accounts

When you click the link, a window is displayed showing both the unavailable payment account and the reason that the payment account is unavailable.

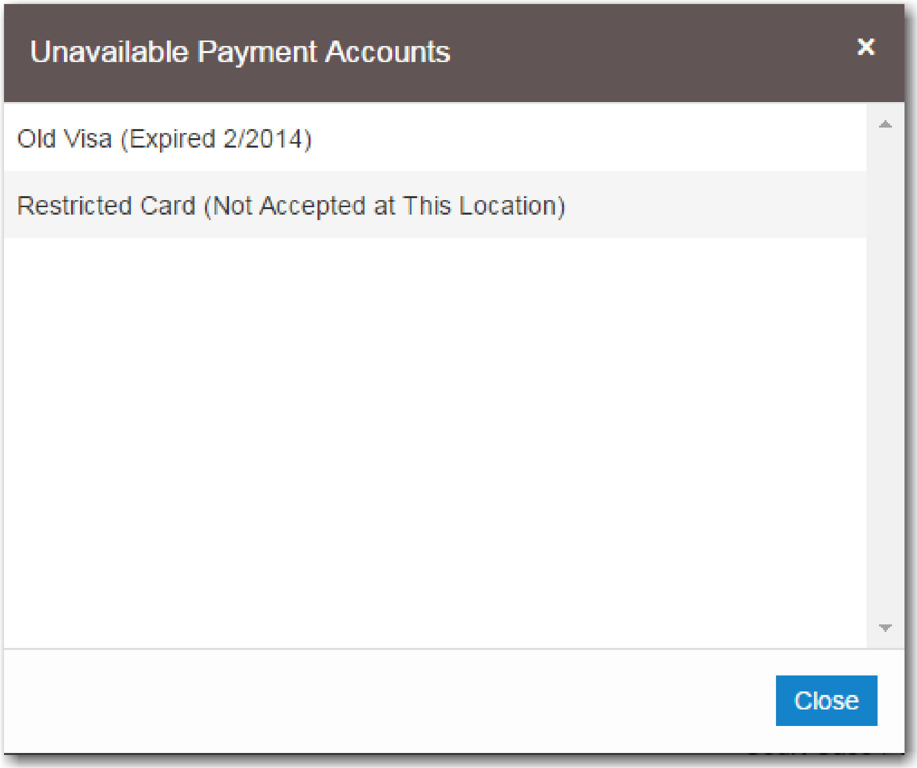


Figure 7.38 – Unavailable Payment Accounts Window

You cannot continue with your filing until you enter the correct information.

Restriction of Use of Electronic Checks to Firm Users

A court can restrict individual (non-firm) filers from using an electronic check payment account when submitting a filing.

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

When the feature is enabled, a blue link is displayed in the **Payment Account** field in the **Fees** section. The link contains the following phrase: `View Unavailable Payment Accounts`.

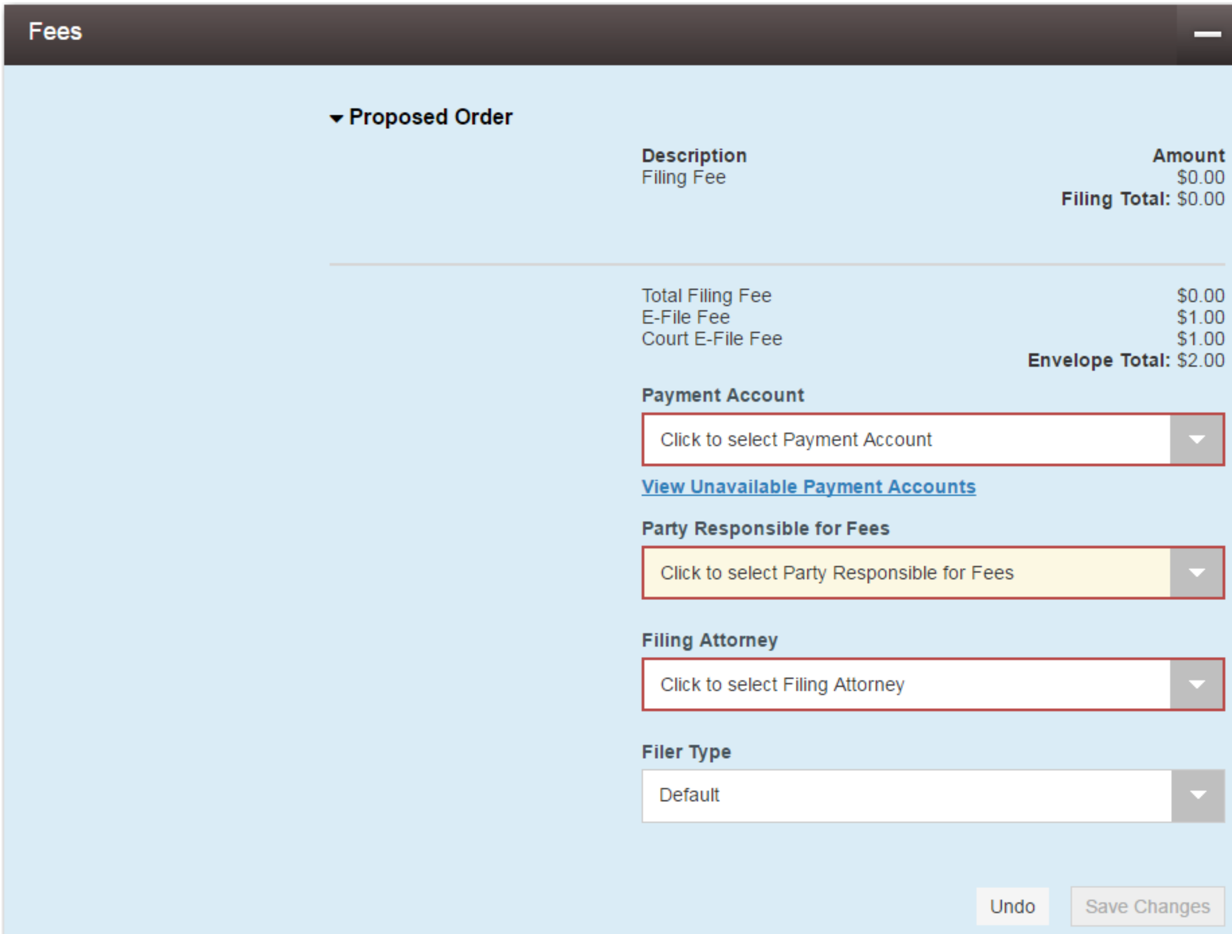


Figure 7.39 – Error Message in the Payment Account Field

Draw Down Account User Interface

The locations of existing draw down accounts can be edited.

Note: Draw down accounts are configured by Tyler and may not be available on your system.

A tree view of the draw down accounts shows the parent-child relationship of the courts, which means that you can easily see and select the courts that you want to file into.

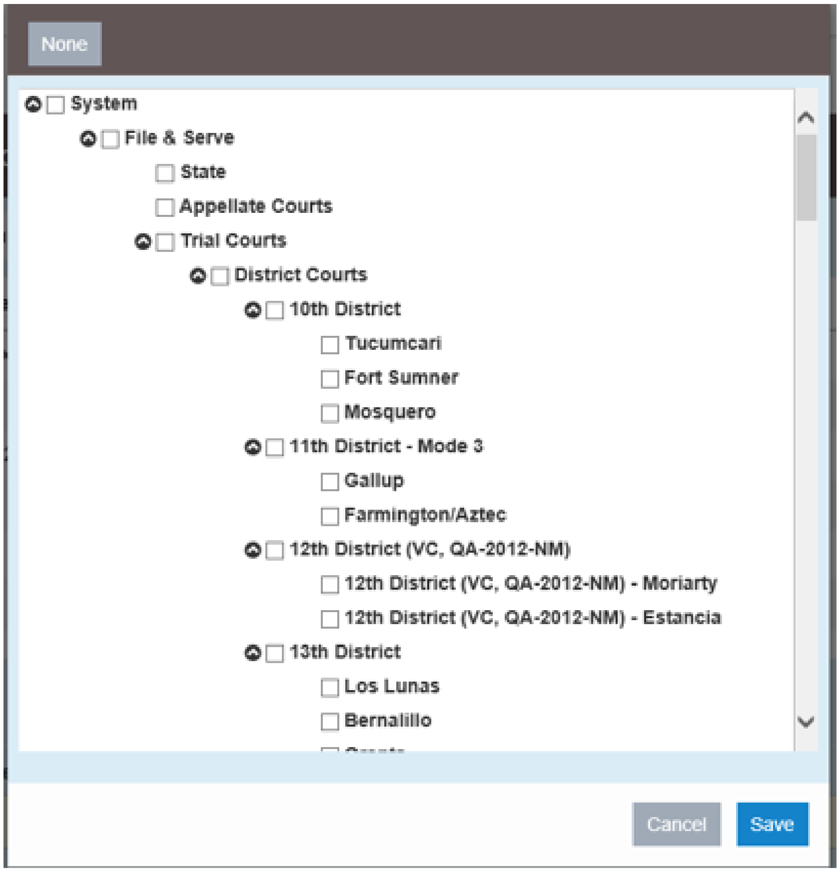


Figure 7.40 – Draw Down Account with Parent-Child Relationship of Courts

Manage Firm Information

The Firm Administrator can update the contact information for the firm.

Updating Firm Information

To update firm information, perform the following steps:

1. From the **Actions** drop-down list, select **Firm Information**.

   The *Firm Information* page is displayed.

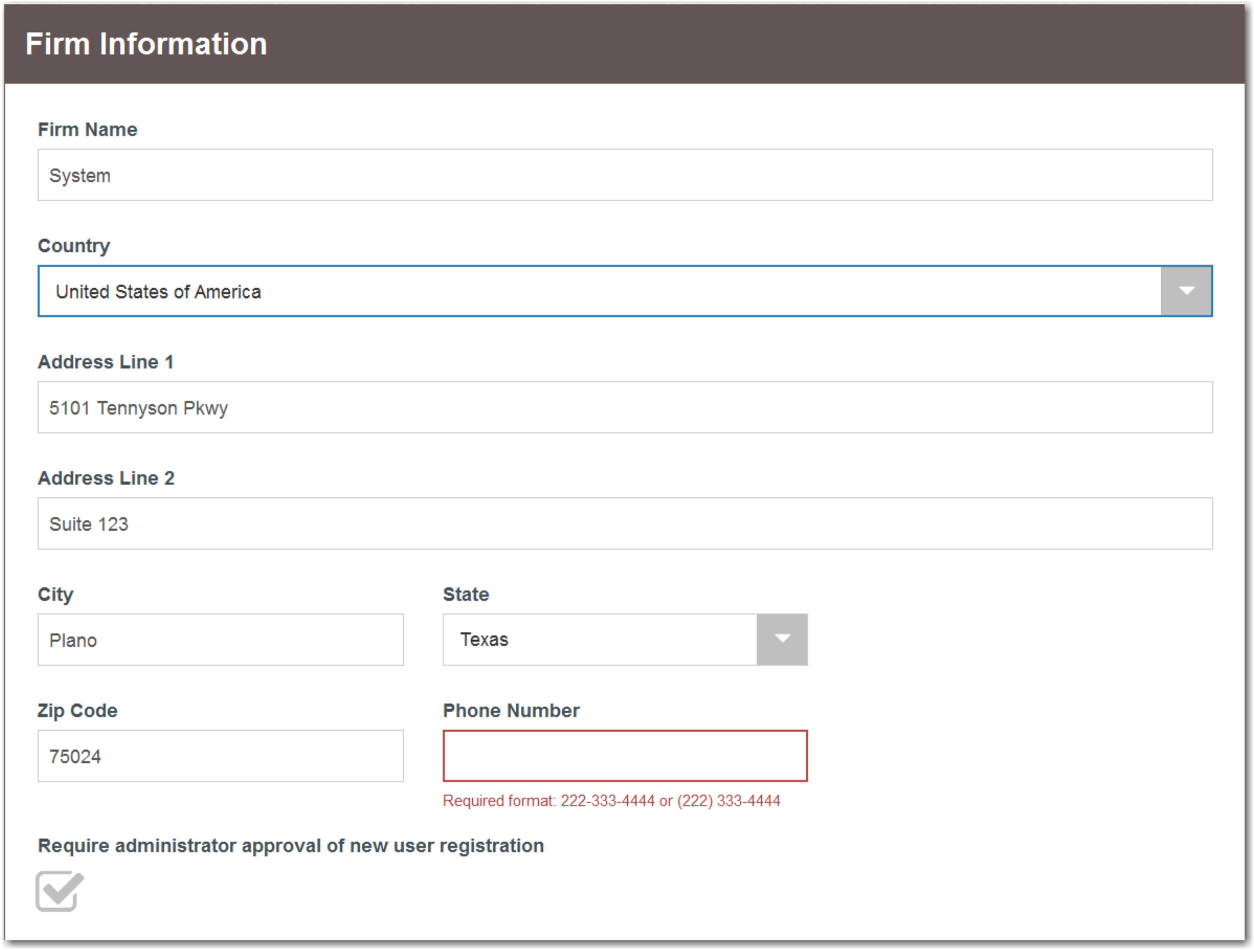


Figure 7.41 – Firm Information Page

2. Make any changes to the firm information.

   Note: If the Require administrator approval of new user registration check box is selected, then you or another Firm Administrator must approve or remove all new firm users. This feature acts as an added layer of security for users you have invited to join your firm. Specify whether you want to approve invited users after they have registered.

3. When you are done, click Save Changes to save your modifications, or click Undo to exit without changing your contact information.

8 Templates

Topics covered in this chapter

Creating a Template

Envelope templates allow you to quickly file into a case or create a new case from a template that you have created, which saves you time.

To create a new template, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Templates**.

   The *Templates* page is displayed.

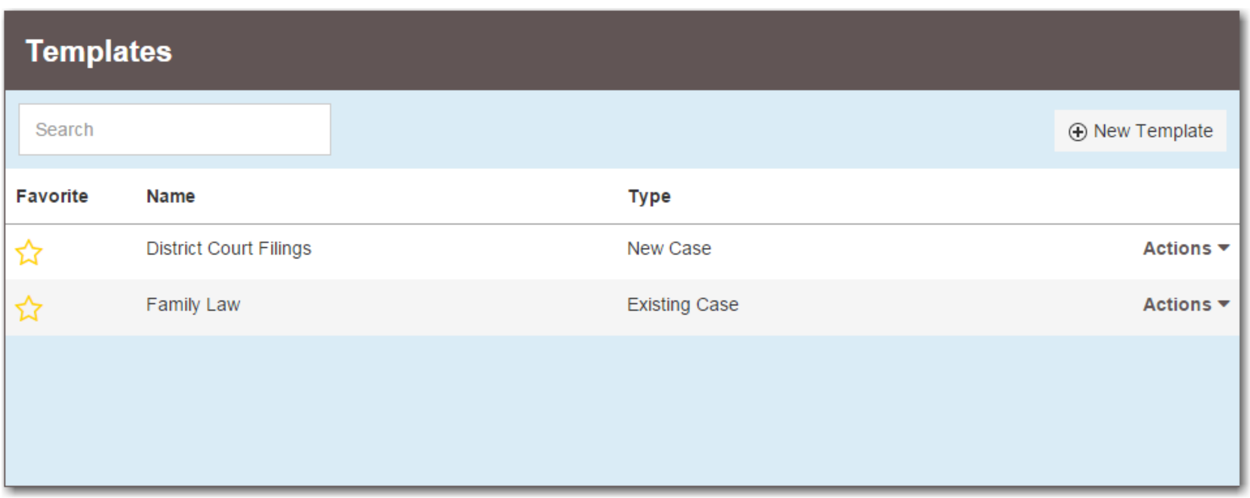
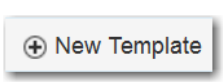


Figure 8.1 – Templates Page

2. Click 

.

   The *New Template* page is displayed.

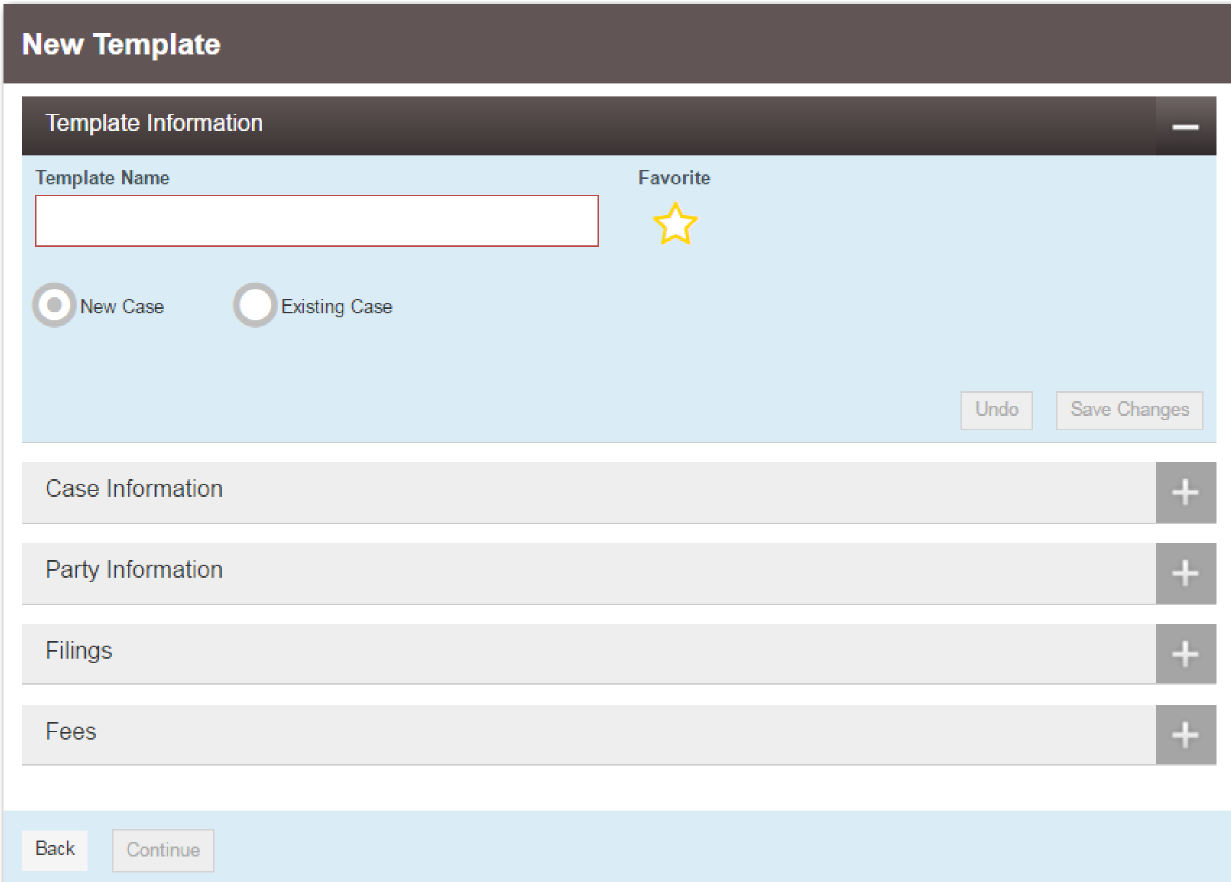


Figure 8.2 – New Template Page

3. To create a new template, type a name for the template in the **Template Name** field. Then, select one of the following options:

    - Click the **New Case** option when creating a template for a new case.

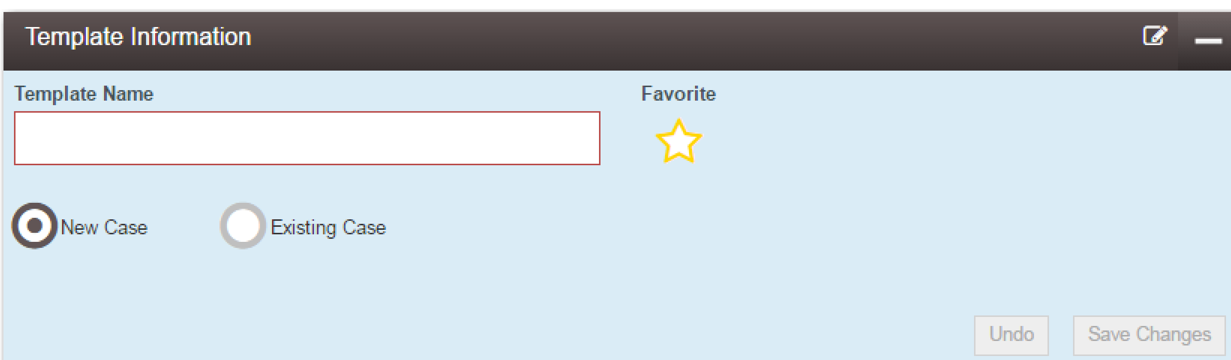


Figure 8.3 – Template Information Section with New Case Option Selected

    - Click the **Existing Case** option when creating a template for an existing case (i.e. subsequent filing).

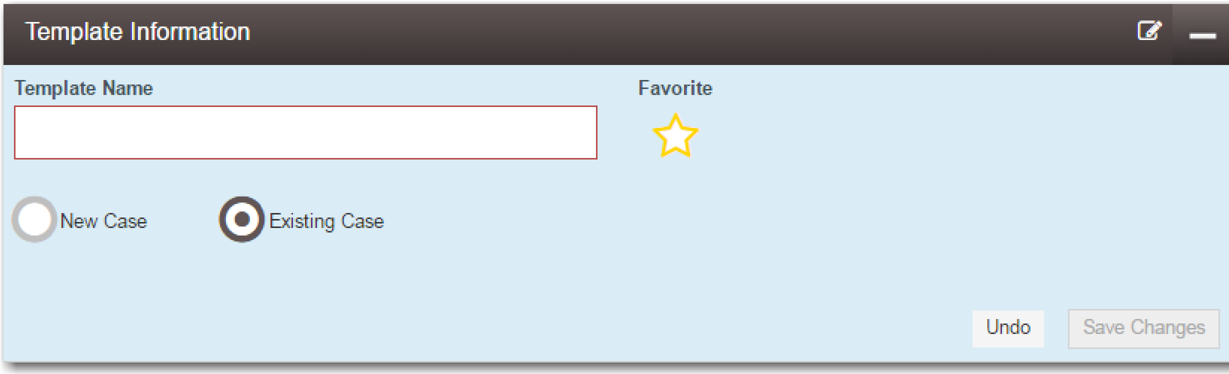


Figure 8.4 – Template Information Section with Existing Case Option Selected

4. Click Save Changes to save your changes, or click Undo to cancel the action.

   Note: Only the template name is required. You can enter as little or as much information on a template as you want.

5. Complete the fields in the **Case Information** section:

   a. Select your court location from the **Location** drop-down list.

      Note: The court location is generally the county or district court where you will be doing the filing.

   b. Select the specific court from the **Refine Location** drop-down list.

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

      Note: The items in this list are limited to only the courts in the county or district that you previously selected.

   c. Select the category from the **Category** drop-down list.

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

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

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

      Note: The case type can be configured to mask the text that would be displayed for the case category and case type values. The masking is configured by Tyler at the court's request. It may not be available on your system.

      The fee associated with the case type is displayed.

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

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

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

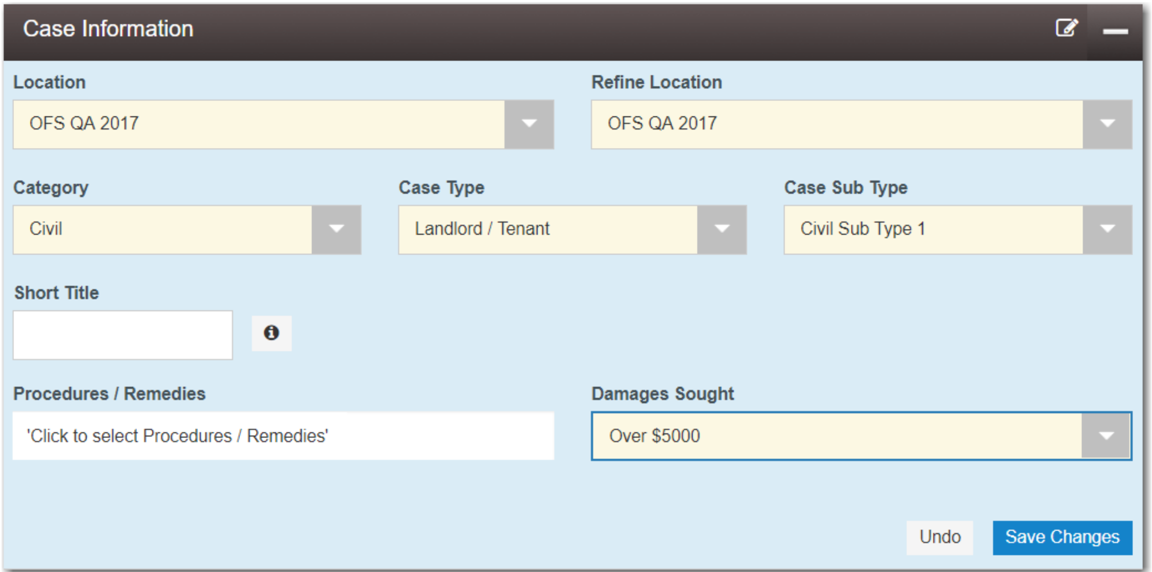


Figure 8.5 – Example of a Case Information Section

6. Click 

.

   The **Case Cross Reference Number** section is displayed.

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

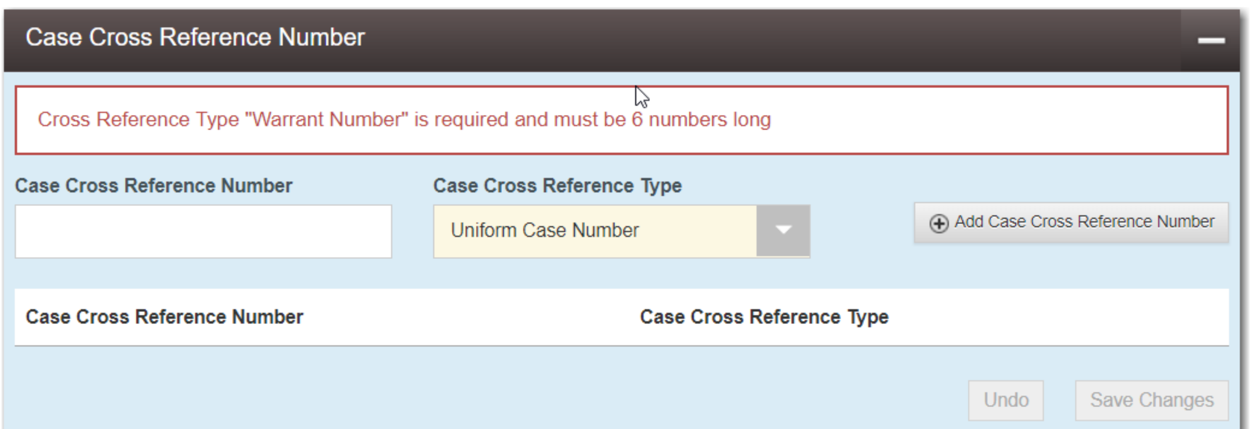


Figure 8.6 – Case Cross Reference Number Section

7. Type the case cross reference number in the **Case Cross Reference Number** field.

   Note: The case cross reference number must be six numbers long.

8. Select the case cross reference type from the **Case Cross Reference Type** drop-down list.

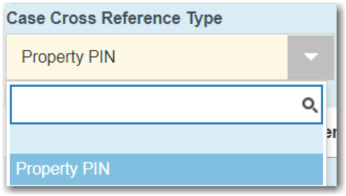
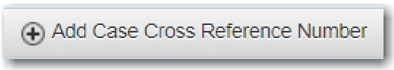


Figure 8.7 – Case Cross Reference Type Drop-Down List

9. Click  .

   The case cross reference number and case cross reference type that you added are displayed.

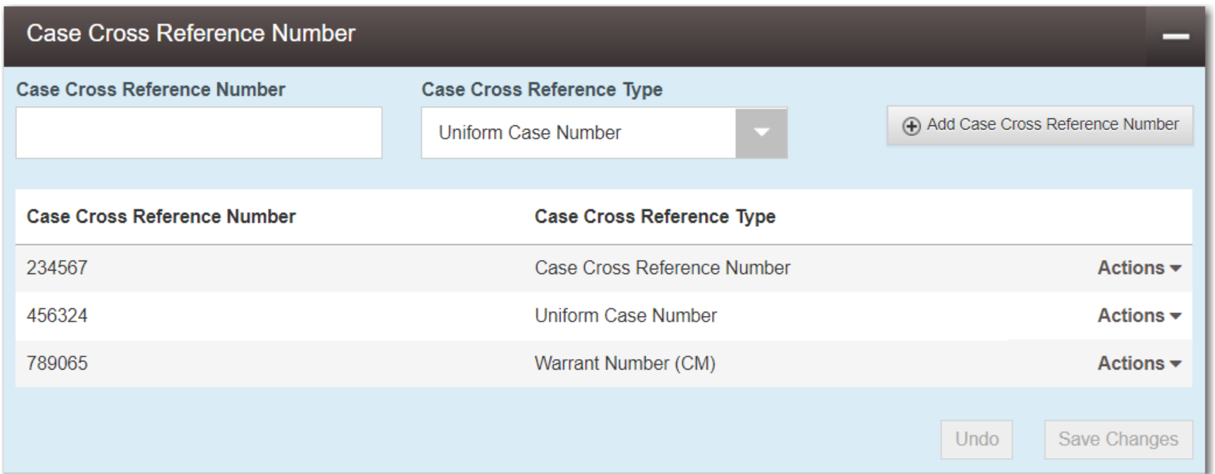


Figure 8.8 – Sample Case Cross Reference Number Section

10. If you want to add another case cross reference to the filing, repeat steps 7 through 9. Continue adding case cross references until you are done.
11. If you want to remove a case cross reference that you previously entered, select **Remove** from the **Actions** drop-down list.

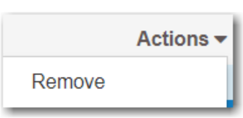
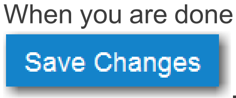


Figure 8.9 – Case Cross Reference Number Actions Drop-Down List

12. When you are done adding all of the case cross reference numbers to the filing, click  .
13. Complete the fields in the **Party Information** section.
14. Complete the information in the **Filings** section.

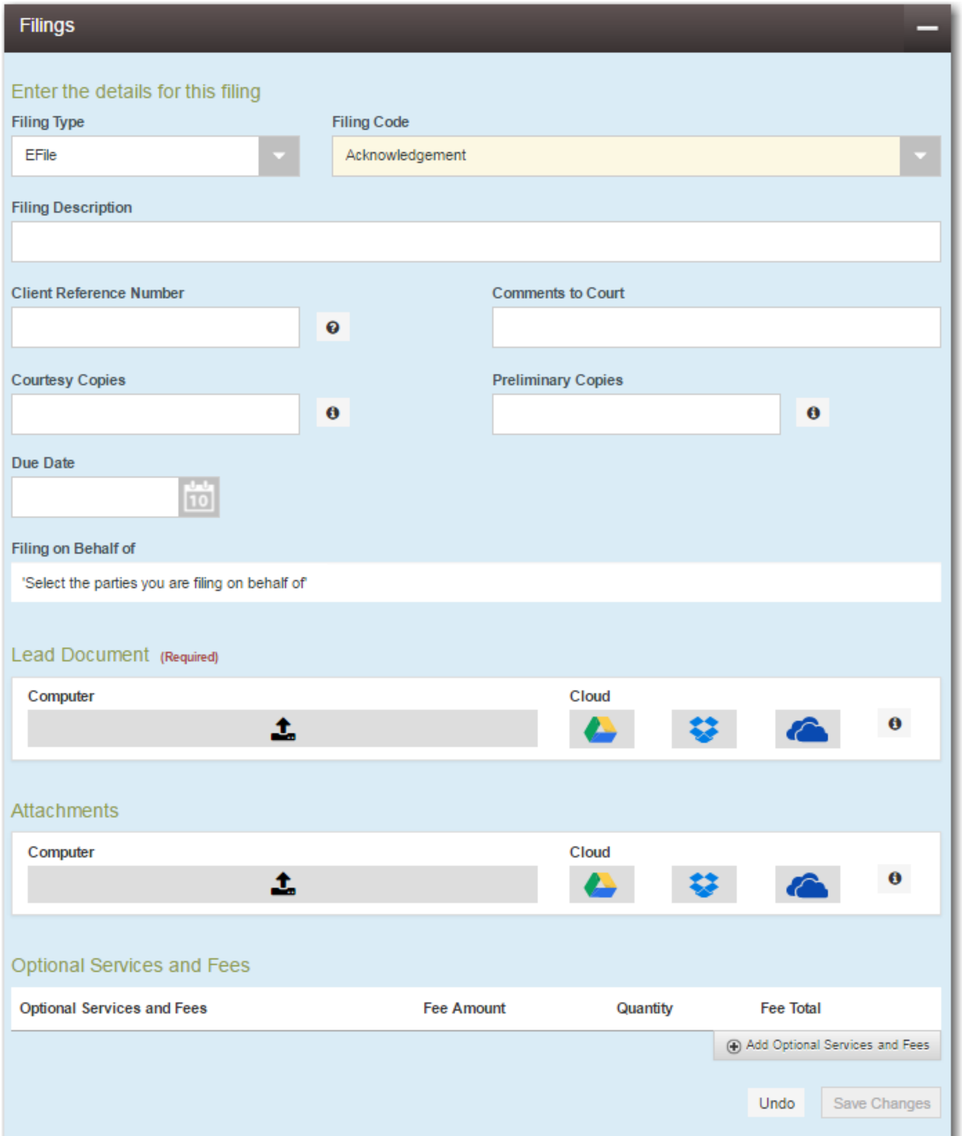


Figure 8.10 – Filings Section

a. Select a filing type from the **Filing Type** drop-down list.
b. Select a filing code from the **Filing Code** drop-down list.

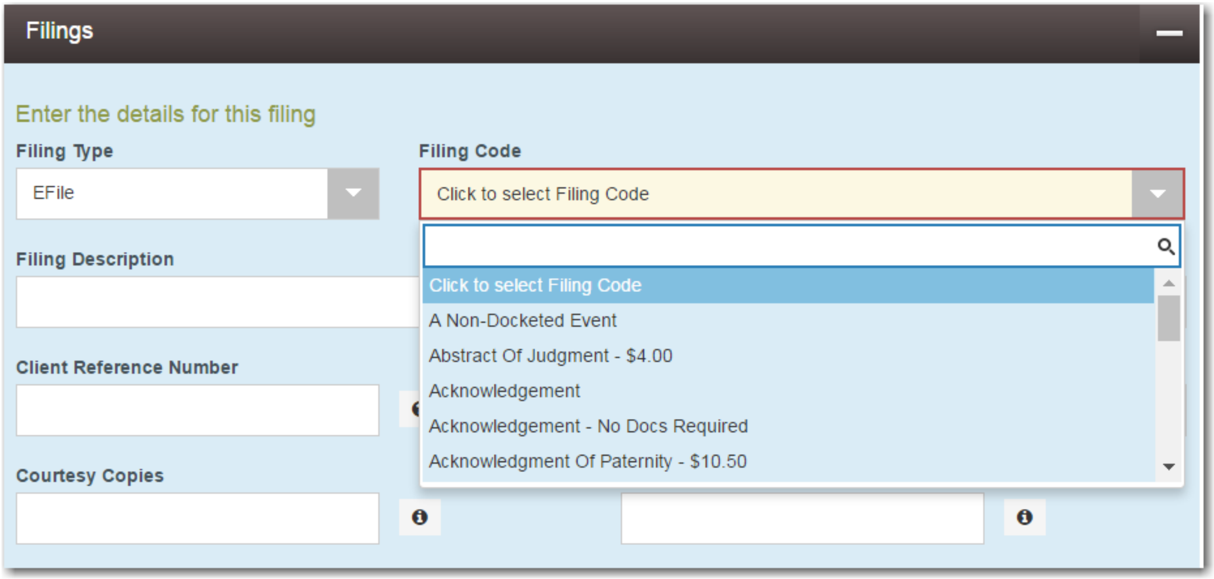


Figure 8.11 – Filing Code Drop-Down List

After you select the filing code, the fee associated with the filing code is displayed.

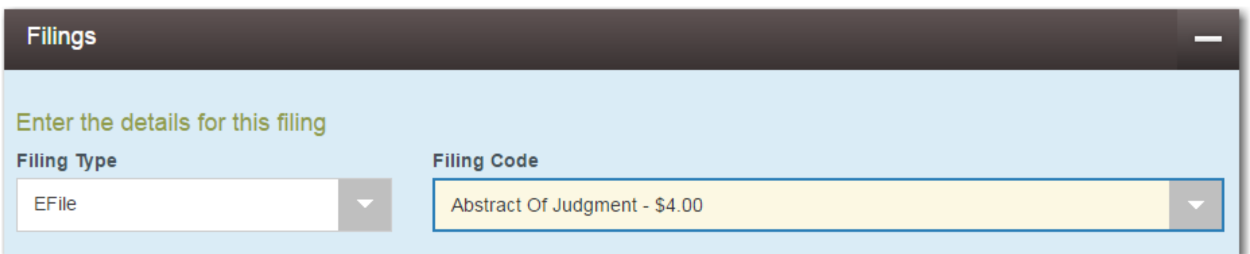


Figure 8.12 – Filing Code Field with Fee Displayed

c. Type a description of the filing in the **Filing Description** field.

d. Type a client reference number in the **Client Reference Number** field.

Note: A client reference number is a client-created number for internal purposes only. Most courts do not see or refer to the Client Reference Number field for the filing. This is an optional field.

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. If you want to send preliminary copies of the filing to another party, type the recipient's email address in the **Preliminary Copies** field.

h. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

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

A calendar is displayed from which you can select the specified date.

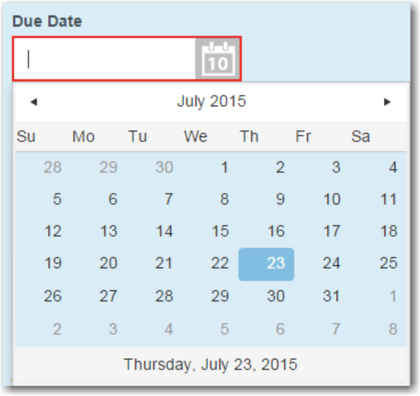


Figure 8.13 – Due Date Calendar

i. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

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

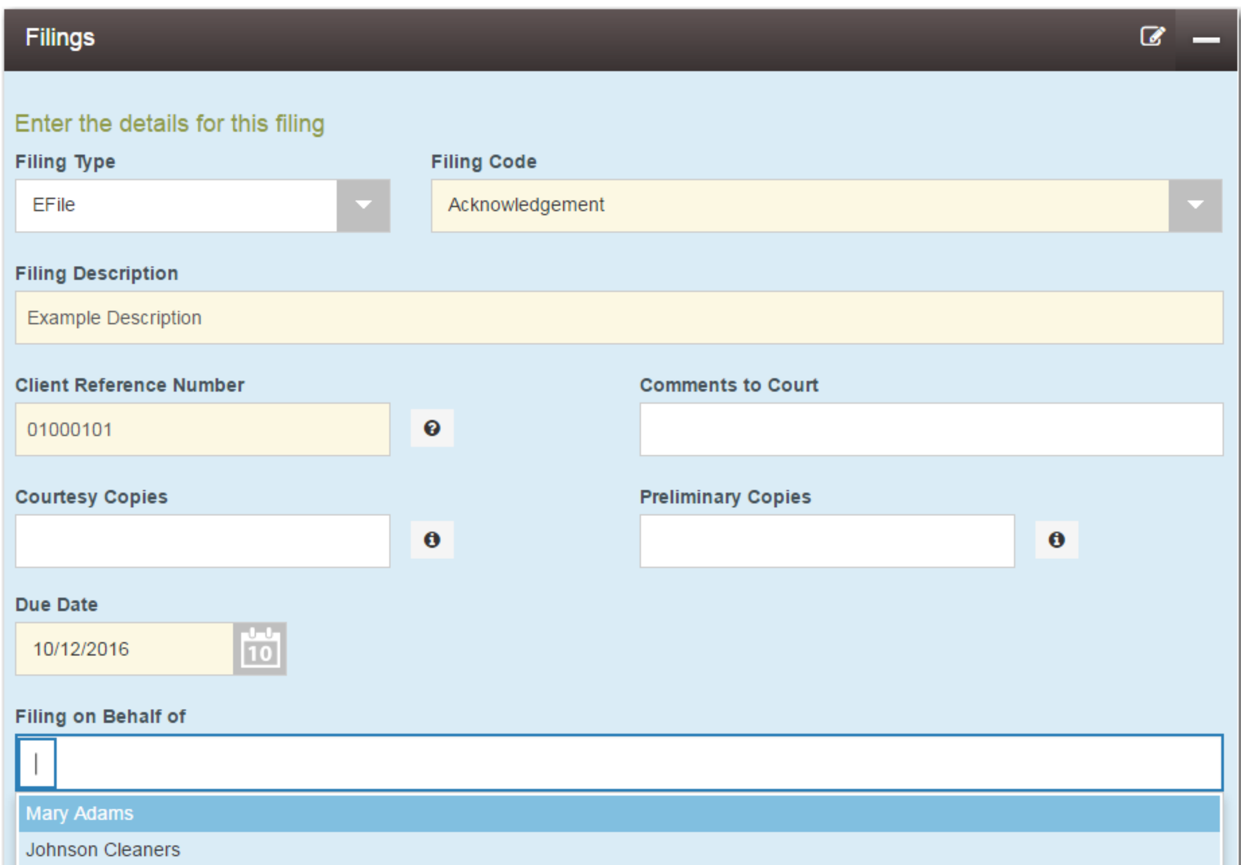


Figure 8.14 – Filing on Behalf of Field in the Filings Section

j. Click the **Lead Document** field to select a lead document to upload. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following

cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. Only one document can be uploaded as a lead document.

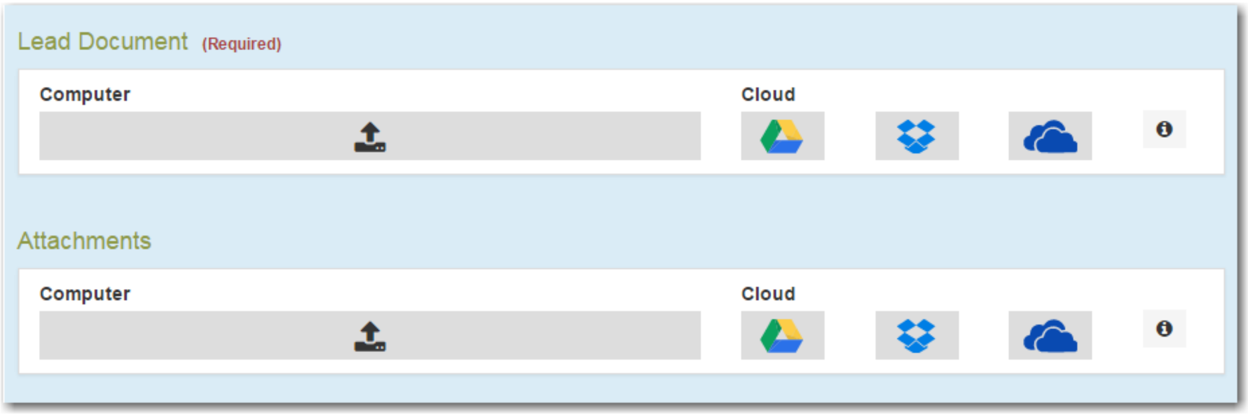


Figure 8.15 – Lead Document and Attachments Fields in the Filings Section

k. Type a name for the lead document in the **Description** field.

Note: Tyler can configure a maximum length for the document name at the client's request. When configured, if a user assigns a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

l. Click the **Security** drop-down list to select the level of security to attach to the document.

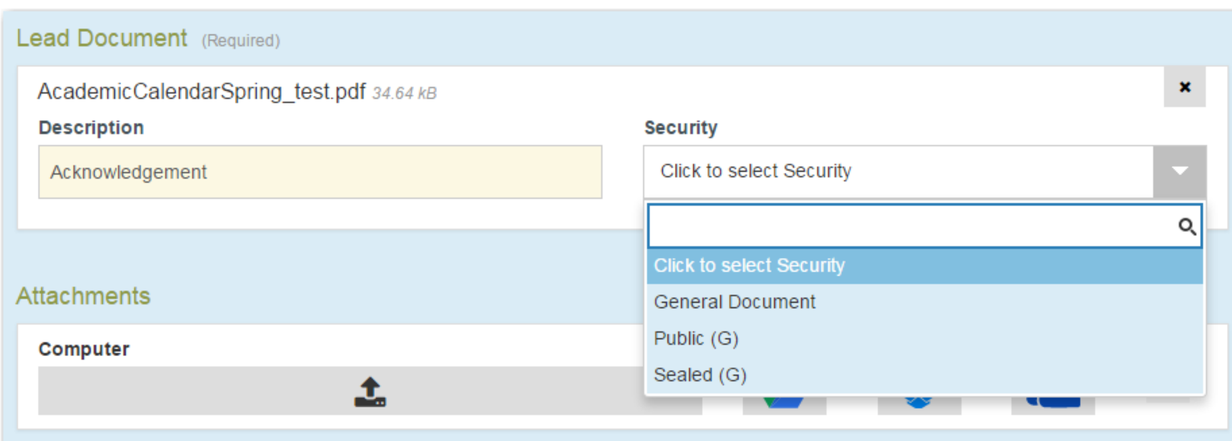


Figure 8.16 – Security Drop-Down List in the Lead Document Section

m. If you have attachments to upload, click the **Attachments** field to select the documents to upload. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

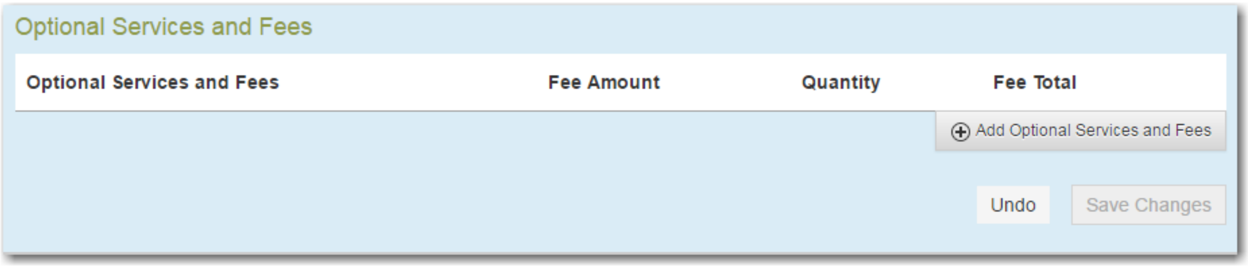
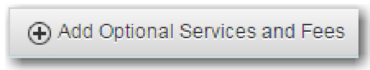


Figure 8.17 – Optional Services and Fees Section

n. If you want to add an optional service to the filing, click 

.

The **Optional Services and Fees** field is displayed.

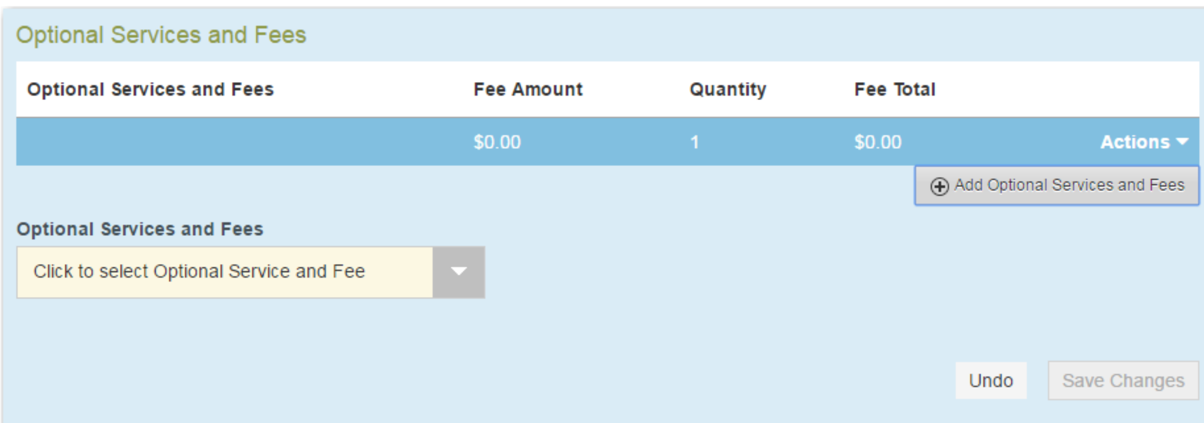


Figure 8.18 – Optional Services and Fees Field in the Optional Services and Fees Section

o. Select the appropriate option from the **Optional Services and Fees** drop-down list.

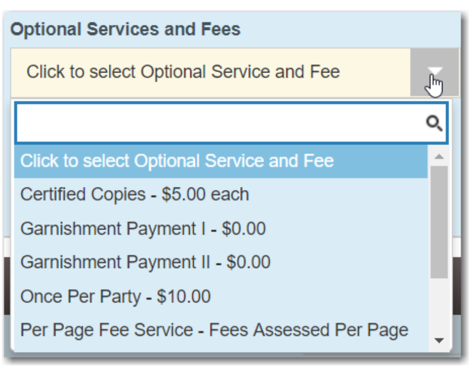


Figure 8.19 – Optional Services and Fees Drop-Down List

The **Enter amount to be paid** field is displayed.

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

Note: The wording displayed on your system may differ from the example provided.

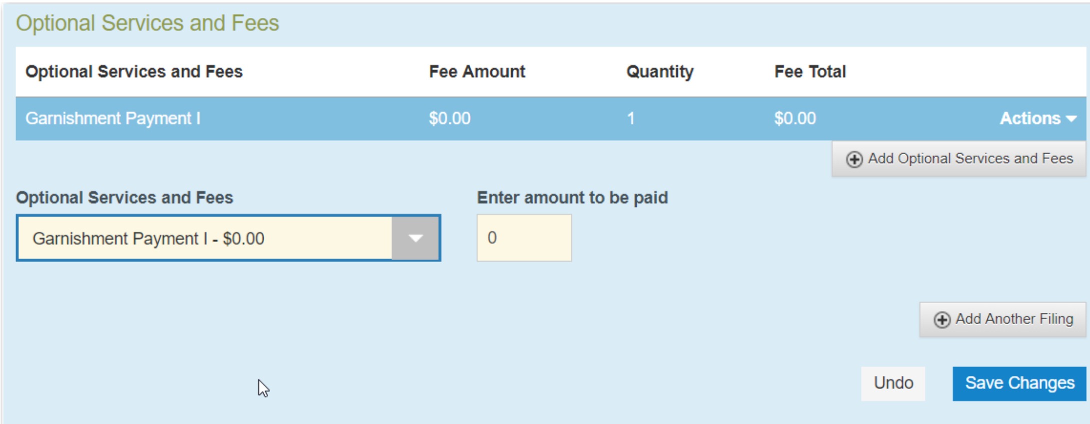


Figure 8.20 – Example of an Optional Services and Fees Section with the Enter Amount to Be Paid Field Displayed

p. Enter the fee for the optional service in the **Enter amount to be paid** field.

q. Click Save Changes.

The fee that you entered is displayed in the **Fee Total** column.

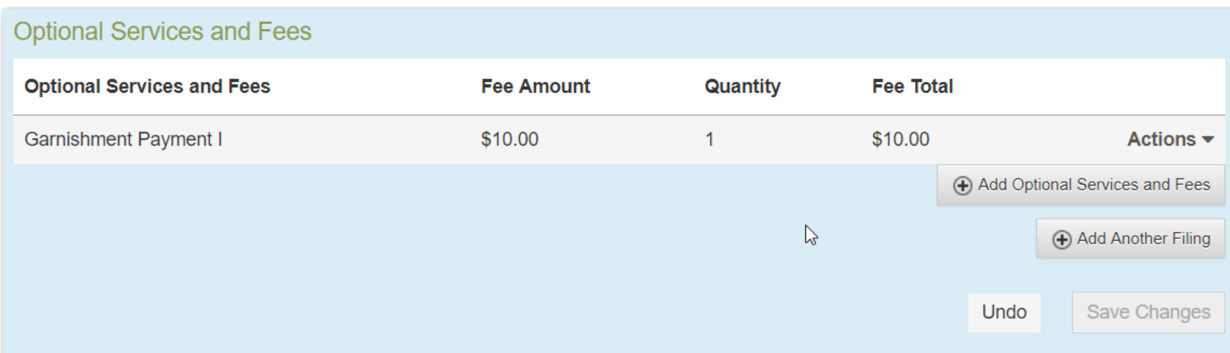


Figure 8.21 – Optional Services and Fees Section with the Fee Amount Displayed

r. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

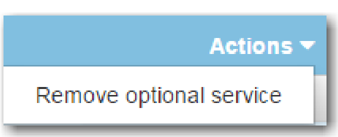


Figure 8.22 – Optional Service Actions Drop-Down List

s. When you are done adding optional services, click Save Changes.

Figure 8.23 – Optional Services and Fees Section with Optional Services Saved

Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

t. If you want to add another filing to the case, click Add Another Filing.

The top of the **Filings** section is displayed, where you can begin another filing.

u. After you have added all of the filings to the case and saved the changes, verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

Note: If you forget to add your name to the service contact list, the system will automatically add it for you, if the system is configured to do so.

v. Click Save Changes to save your changes, or click Undo to cancel the action.

15. Complete the fields in the **Fees** section.

Note: Your credit card is authorized when submitted. However, the transaction fees are not posted to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.

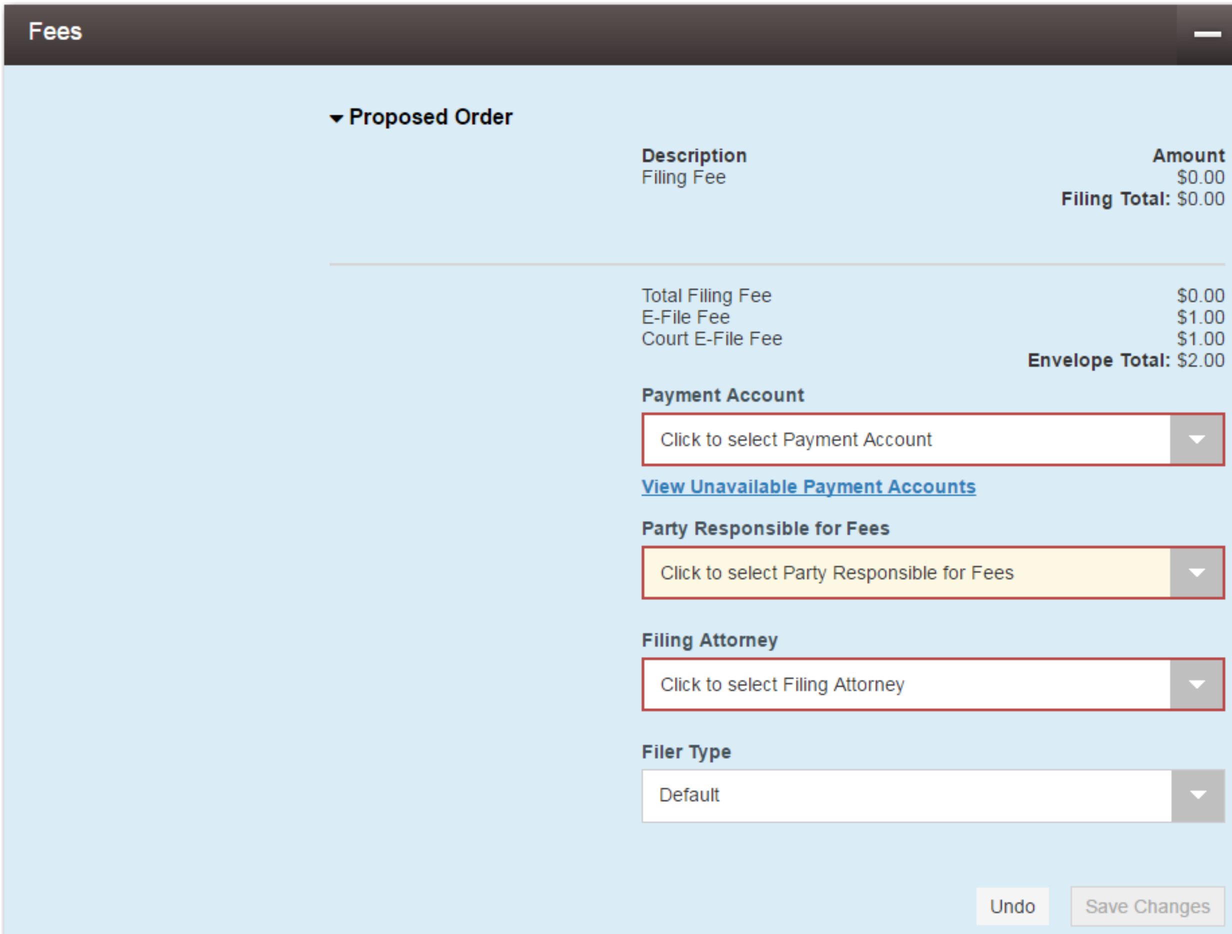


Figure 8.24 – Fees Section

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

   Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

b. Select the party that is responsible for paying the fees in the **Party Responsible for Fees** drop-down list.

c. Select the filing attorney from the **Filing Attorney** drop-down list.

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

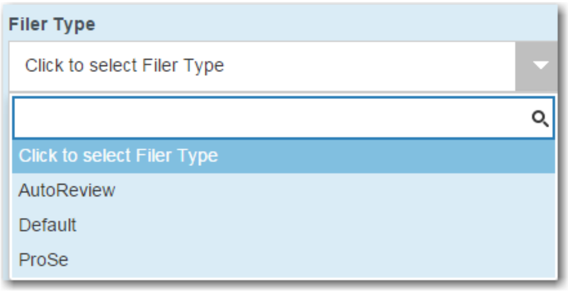


Figure 8.25 – Filer Type Drop-Down List

e. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.

16. Click **Continue** to continue creating the template, or click **Cancel** to cancel the template creation.

When you click **Continue**, the *Confirm Template Details* page is displayed.

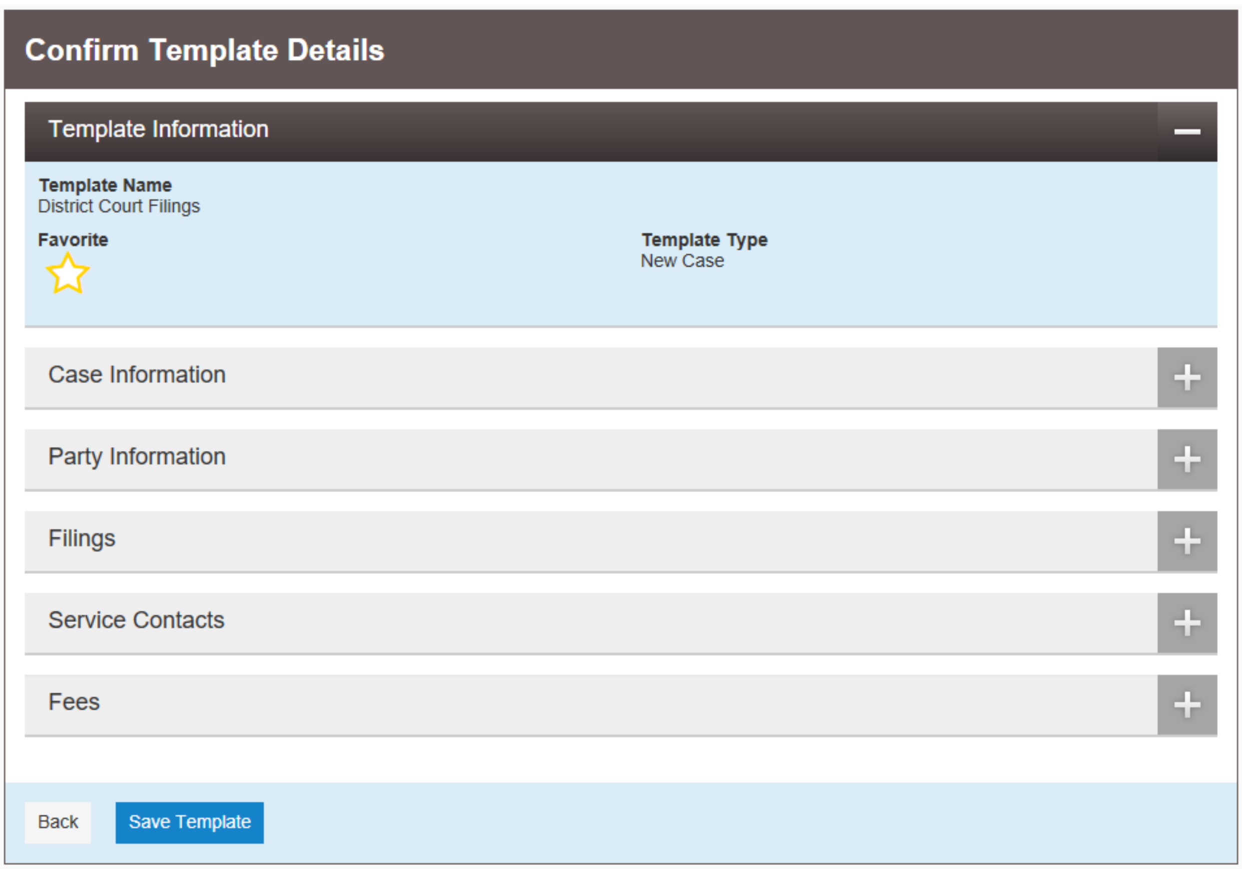
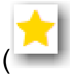


Figure 8.26 – Confirm Template Details Page

17. Review the template details and click **Save Template** to save the template, or click **Back** to go back to the previous page.

18. To designate a template as a favorite, click  in the **Favorite** column on the *Templates* page.

The color of the star fills in, indicating this template is a favorite ().

Note: Favorite templates are displayed first on the *Templates* page.

Editing a Template

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

To edit a template, perform the following steps:

1. From the **Actions** drop-down list, select **Templates**.

   The *Templates* page is displayed.

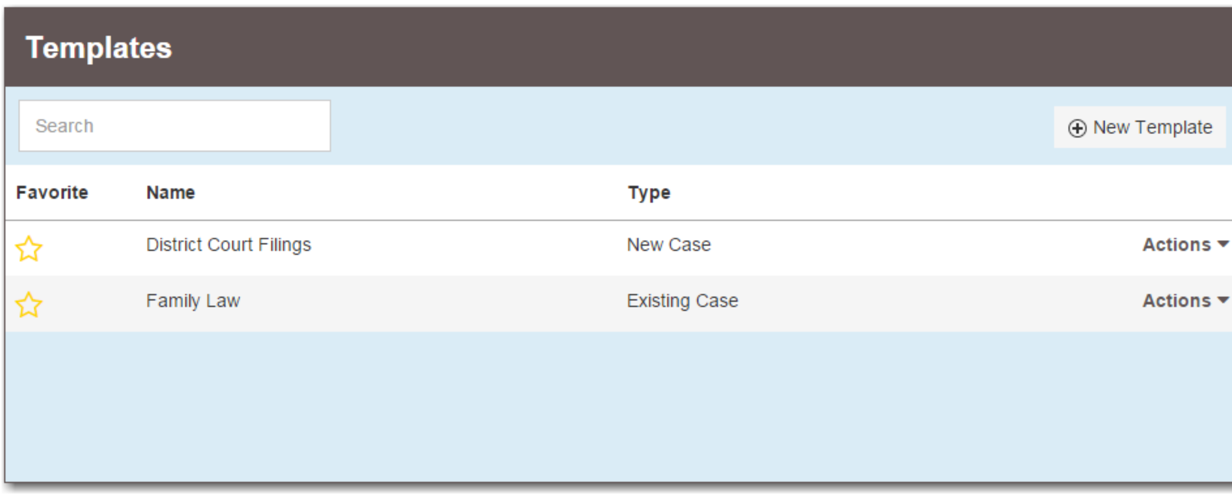


Figure 8.27 – Templates Page

2. Locate the template that you want to change. From the **Actions** drop-down list for the specified template, select **Edit Template**.

   The template is displayed.

3. Make any necessary changes.

4. When you are done modifying the template, click **Continue**.

   The *Confirm Template Details* page is displayed.

5. If you are satisfied with your changes to the template, click **Save Template**.

Using a New Case Template

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

To use a template that you previously created, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Templates**.

   The *Templates* page is displayed.

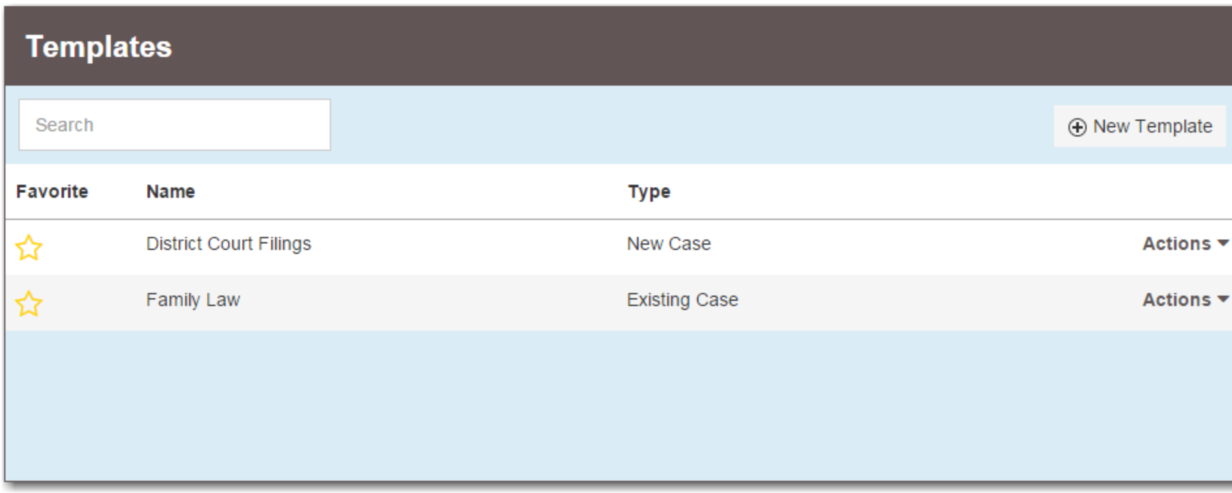


Figure 8.28 – Templates Page

2. Locate the template that you want to use for your case. From the **Actions** drop-down list for the specified template, select **Use Template**.

   The template is displayed. The portions of the template that you created previously are auto-filled.

3. As applicable, complete all remaining fields for the new case (i.e., **Party Information**, **Filings**, including uploading a lead document, and **Fees**).

4. When all fields have been completed, click Save as Draft or Summary.

   If you click Summary, the case is displayed for your review.

5. If you are satisfied with the case, click Submit.

Using an Existing Case Template

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

To access an existing case template, perform the following steps:

1. On the *Filing History* page, locate the case that you want to file into.
2. From the **Actions** drop-down list for the specified case, select **File Into Case With Template**.

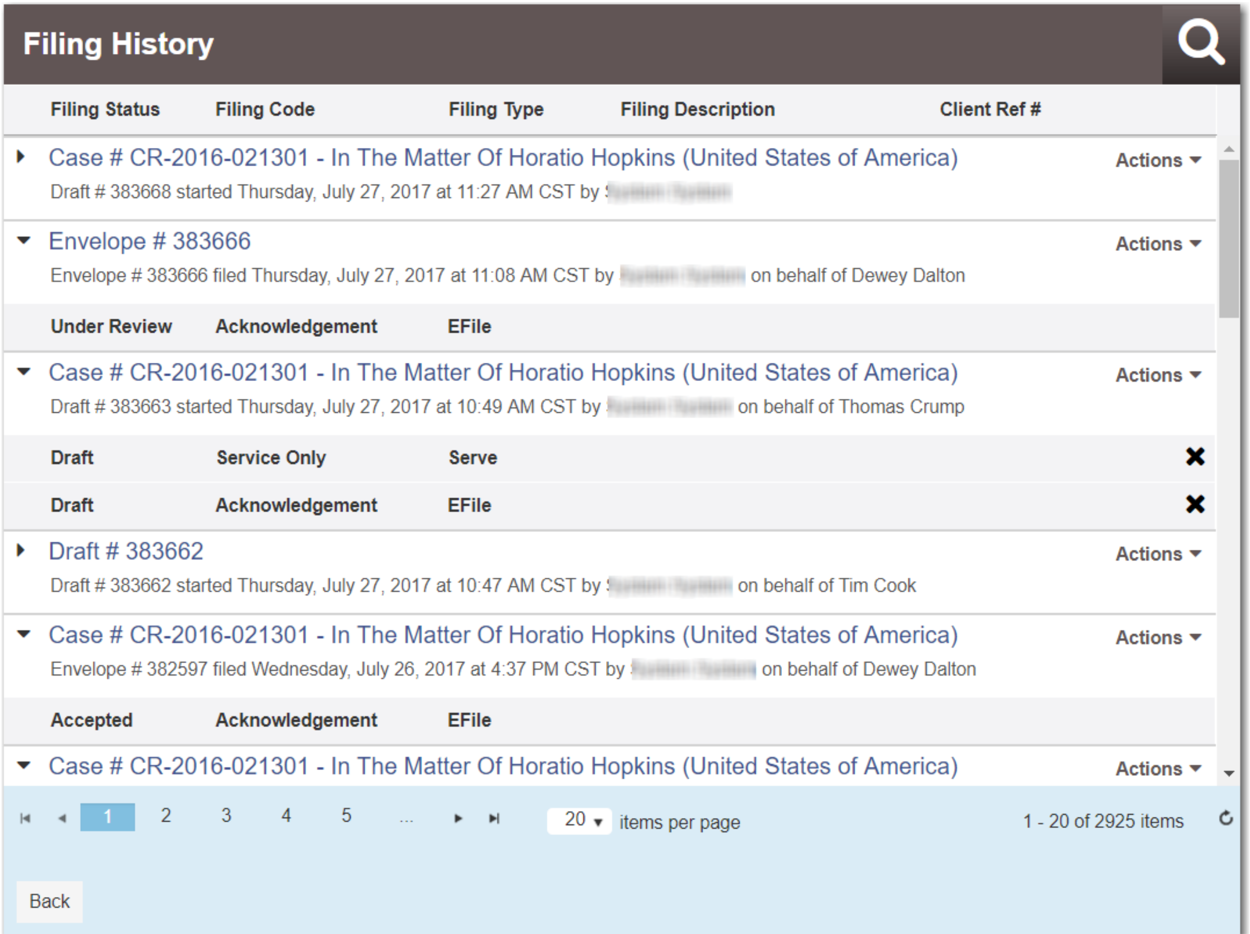


Figure 8.29 – Filing History Page

The *File Into Case With Template* page is displayed.

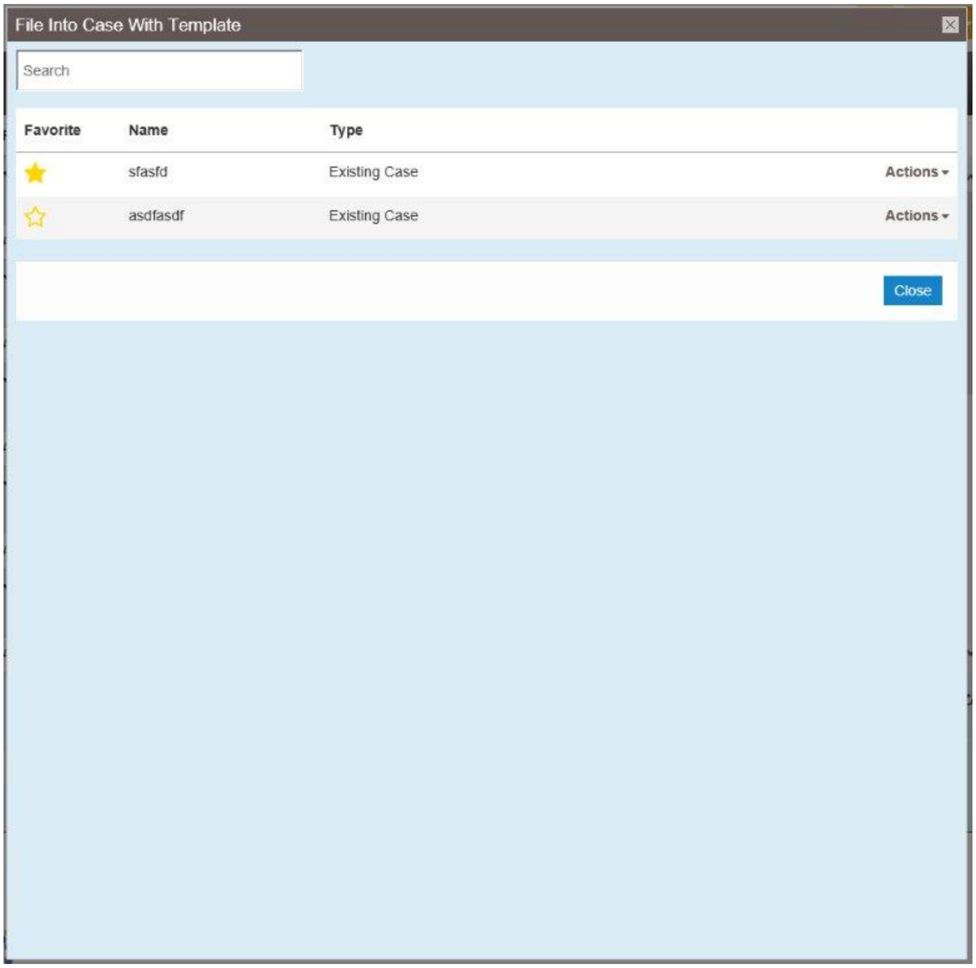


Figure 8.30 – File Into Case With Template Page

3. Locate the template that you want to use for the case you are filing into. From the **Actions** drop-down list for the specified template, select **Use Template**.

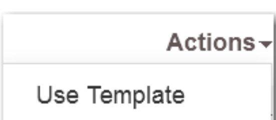
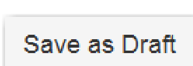


Figure 8.31 – Actions Drop-Down List for Existing Case Templates

The template that you selected is displayed. The **Case Information** and **Party Information** fields are already populated since this is an existing case. You can add additional parties.

4. Complete the filing details in the **Filings** section.
5. Complete the fields in the **Fees** section.
6. Click either 

or 

.

Note: If you save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue your filing.

Clicking Summary displays a page that reflects your filing.

7. If you click Summary, review the page, and then click Submit.

   A new envelope of your filing is included on the *Filing History* page.

Viewing Template Details

You can view a template that you previously created.

To view the details of an existing template, perform the following steps:

1. From the **Actions** drop-down list, select **Templates**.

   The *Templates* page is displayed.

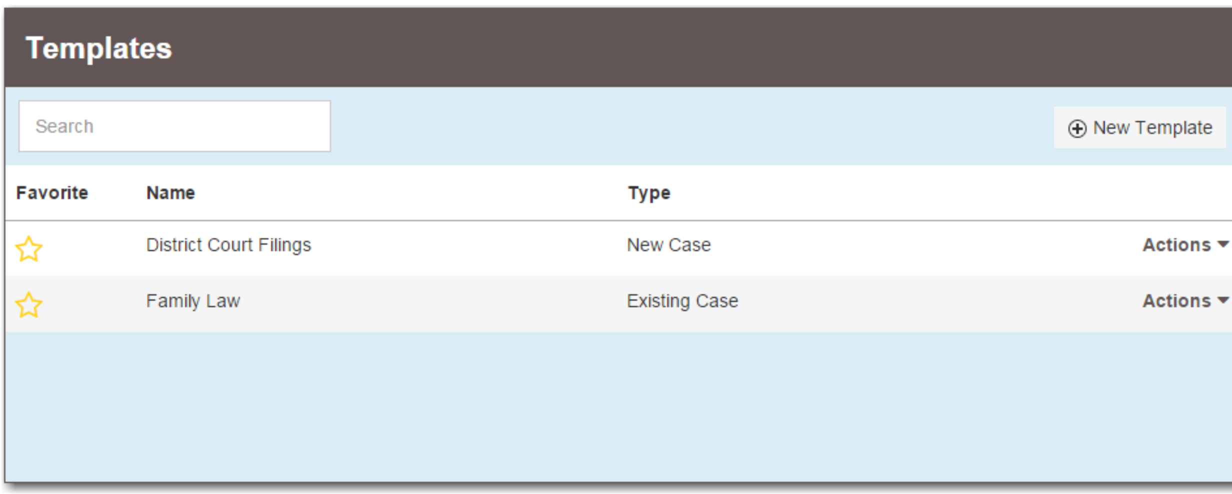


Figure 8.32 – Templates Page

2. Locate the template that you want to view. From the **Actions** drop-down list for the specified template, select **View Template Details**.

   The last version of the template that you saved is displayed.

Deleting a Template

You can delete a template that you no longer need.

To delete an existing template, perform the following steps:

1. From the **Actions** drop-down list, select **Templates**.

   The *Templates* page is displayed.

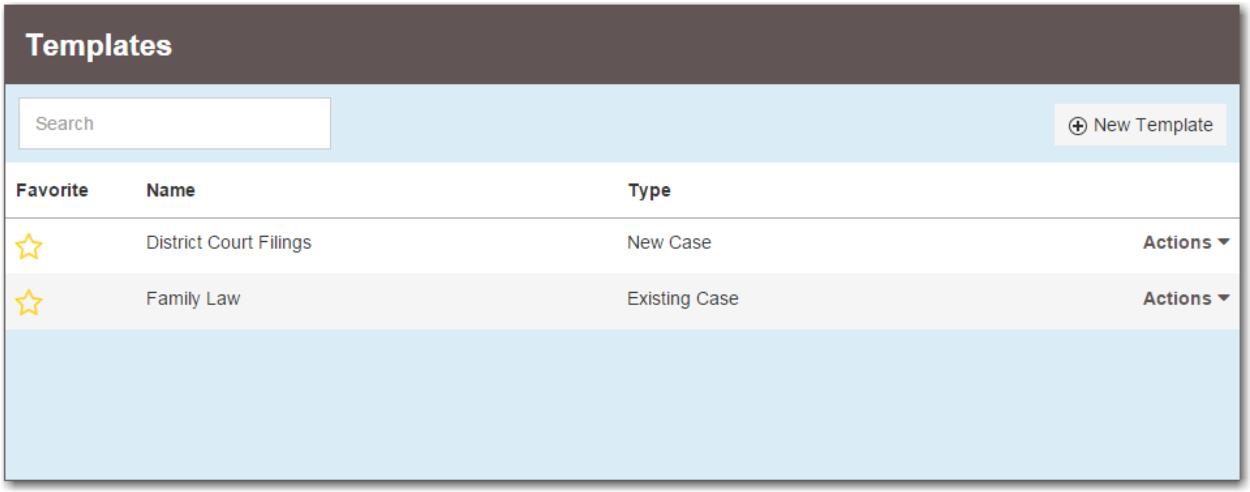


Figure 8.33 – Templates Page

2. Locate the template that you want to delete. From the **Actions** drop-down list for the specified template, select **Delete Template**.

   The template is immediately deleted.

9 Case Initiation

Topics covered in this chapter

You can initiate a case from the **Actions** drop-down list on the *Filer Dashboard* page or from the **New Filing** section on the *Filer Dashboard* page.

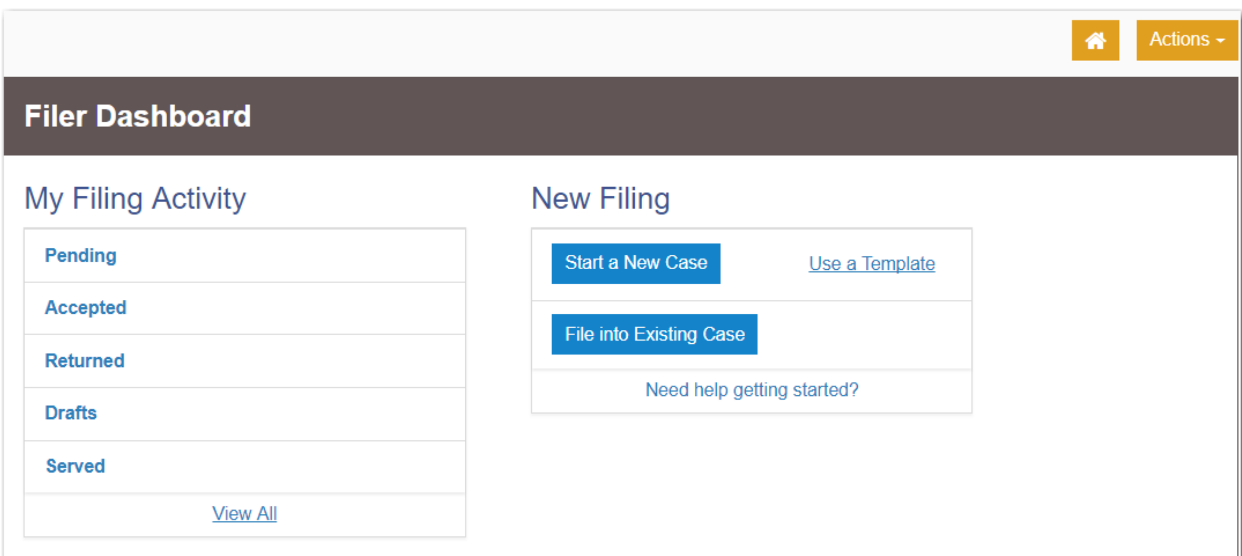


Figure 9.1 – Filer Dashboard Page

Filing a New Case

You can file a new case in a couple of ways.

To file a new case, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

   The *Start a New Case* page is displayed.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section:

   Note: A red box around the field indicates that it is required.

   a. Select your court location from the **Location** drop-down list.

      Note: The court location is generally the county or district court where you will be doing the filing.

   b. Select the specific court from the **Refine Location** drop-down list.

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

      Note: The items in this list are limited to only the courts in the county or district that you previously selected.

   c. Select the category from the **Category** drop-down list.

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

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

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

      Note: The case type can be configured to mask the text that would be displayed for the case category and case type values. The masking is configured by Tyler at the court's request. It may not be available on your system.

      The fee associated with the case type is displayed.

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

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

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

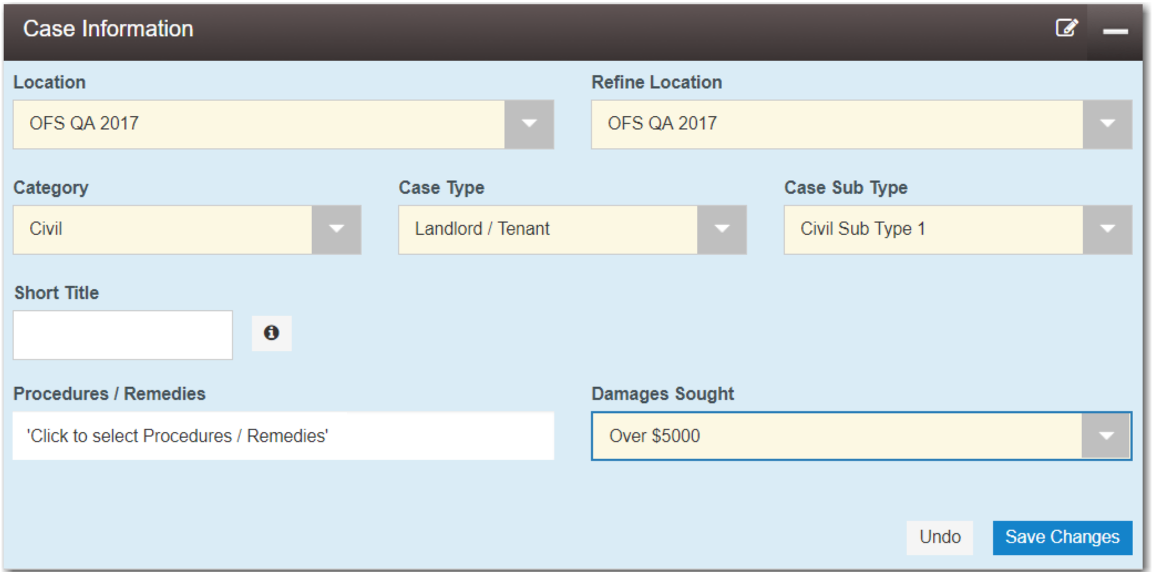


Figure 9.2 – Example of a Case Information Section

3. After completing the required fields, click 

.

   The **Case Cross Reference Number** section is displayed.

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

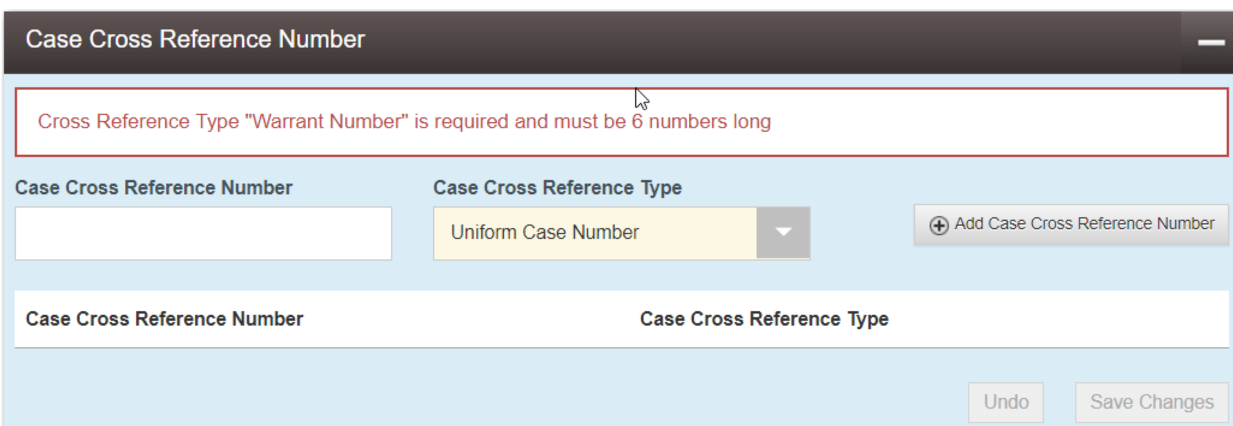


Figure 9.3 – Case Cross Reference Number Section

4. Type the case cross reference number in the **Case Cross Reference Number** field.

   Note: The case cross reference number must be six numbers long.

5. Select the case cross reference type from the **Case Cross Reference Type** drop-down list.

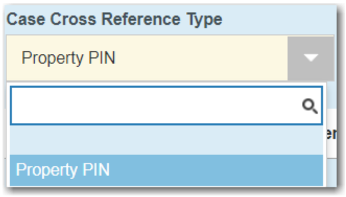
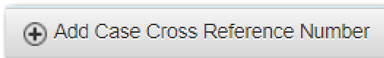


Figure 9.4 – Case Cross Reference Type Drop-Down List

6. Click .

   The case cross reference number and case cross reference type that you added are displayed.

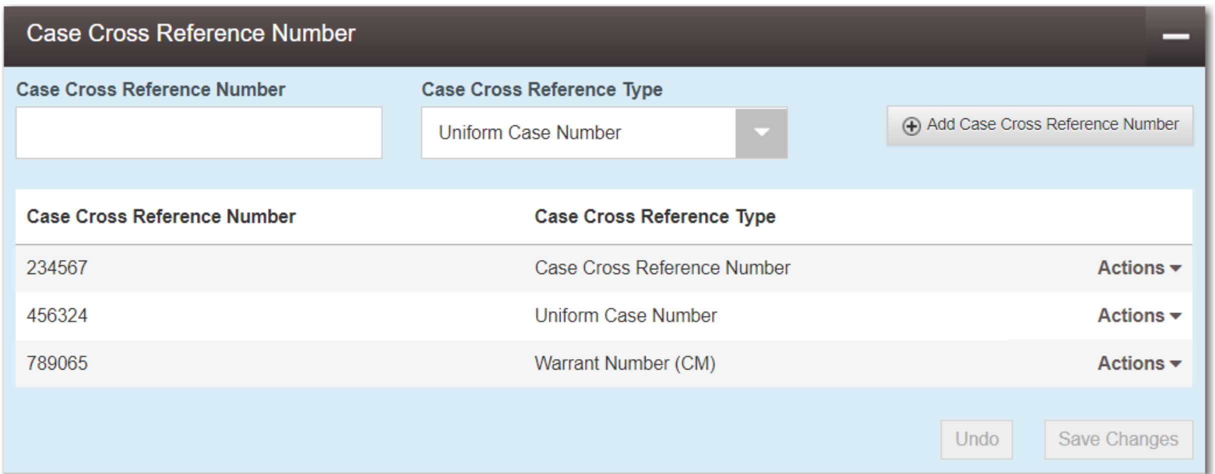


Figure 9.5 – Sample Case Cross Reference Number Section

7. If you want to add another case cross reference to the filing, repeat steps 4 through 6. Continue adding case cross references until you are done.
8. If you want to remove a case cross reference that you previously entered, select **Remove** from the **Actions** drop-down list.

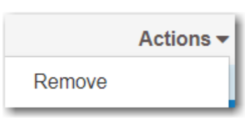
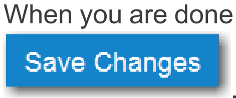


Figure 9.6 – Case Cross Reference Number Actions Drop-Down List

9. When you are done adding all of the case cross reference numbers to the filing, click .

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

Filing a New Case with a Will Filed Date

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

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

To file a new case and enter the date the will was filed, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

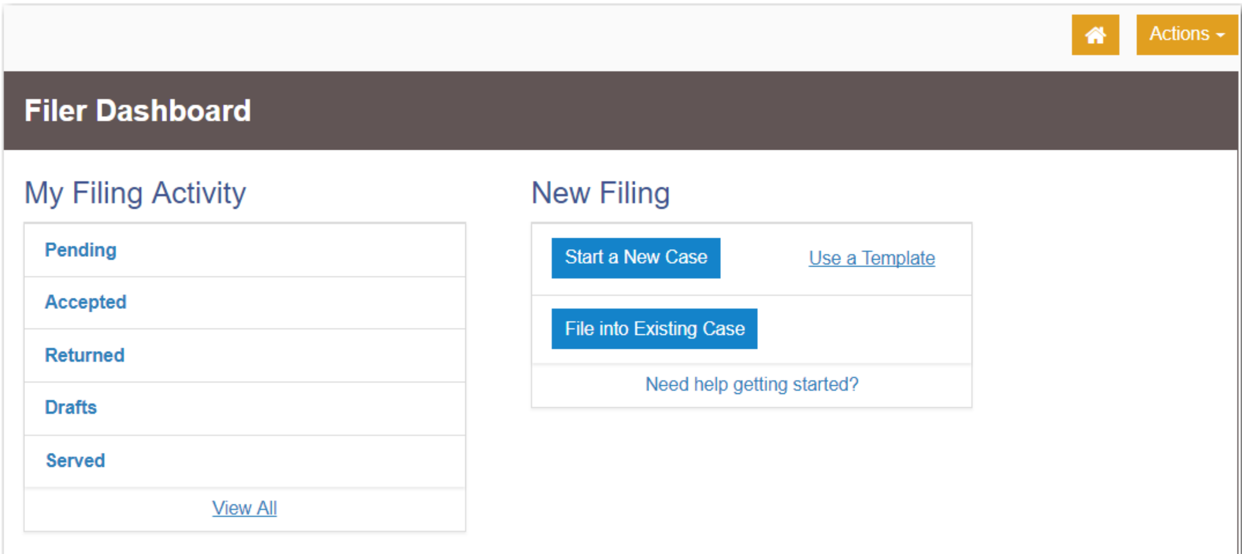


Figure 9.7 – Filer Dashboard Page

   The *Start a New Case* page is displayed.

2. In the **Case Information** section, select the location from the **Location** drop-down list.
3. Select the category from the **Category** drop-down list.
4. Select the case type from the **Case Type** drop-down list.

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

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

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

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

6. If applicable, select the lower court/agency from the **Lower Court/Agency** drop-down list.
7. If applicable, type a title for the case in the **Short Title** field.
8. Type a date in the **Will Filed** field, or click the calendar to select a date from the calendar.

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

9. After completing all required fields in the **Case Information** section, click 

.

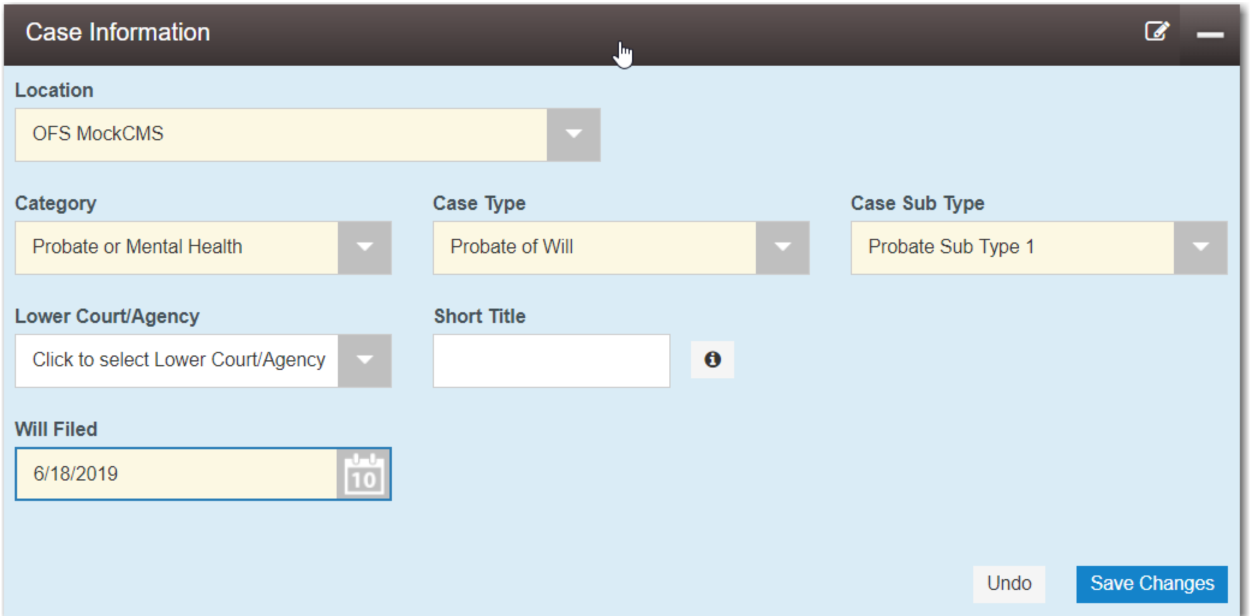


Figure 9.8 – Sample Case Information Section

10. Enter the required information in the **Party Information** section, and then click Save Changes.
11. Enter the required information in the **Filings** section, and then click Save Changes.
12. Verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.
13. Complete the required fields in the **Fees** section, and then click Save Changes.
14. Click Summary to review a summary of your filing.
15. When you are satisfied with the information in your filing, click Submit.

    A new envelope of your filing is included on the *Filing History* page.

Entering Party Details

Each case requires a party type.

To enter the details for the parties involved in the case, perform the following steps:

1. In the **Party Information** section, enter the information for the first party on the case. To indicate whether the party is a business or agency, select the **Party is a Business/Agency** check box.

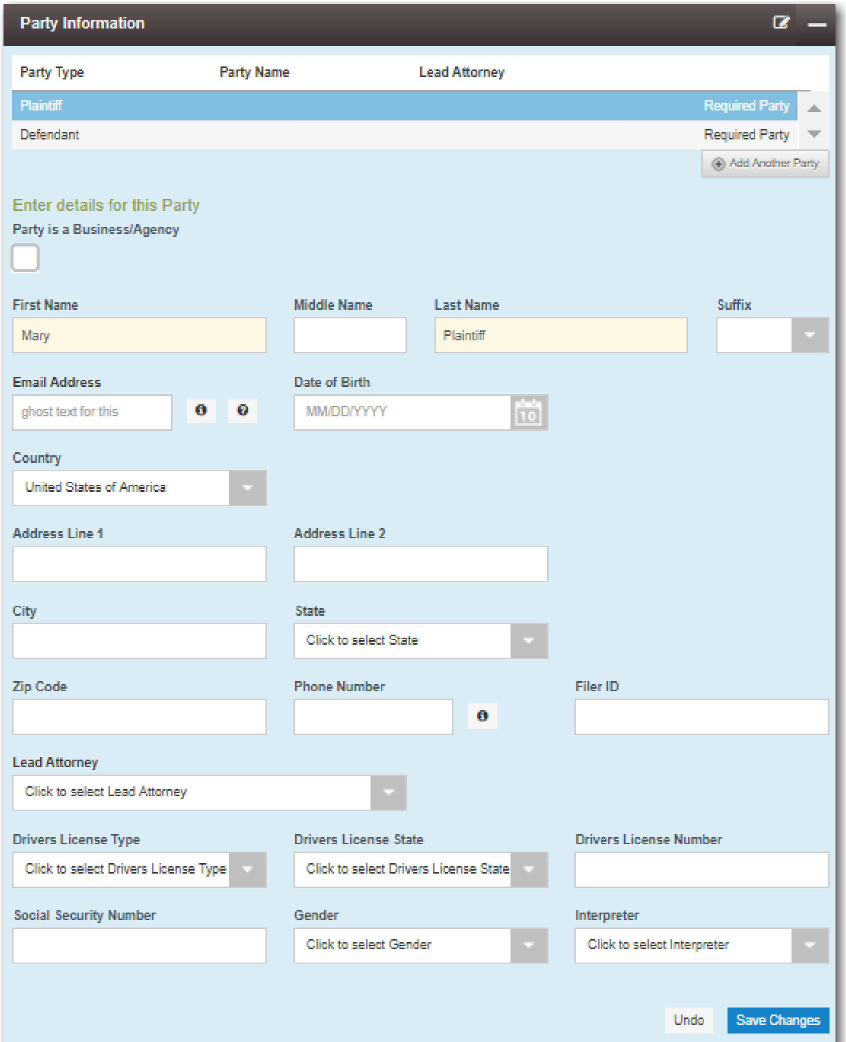


Figure 9.9 – Party Information Section

2. Complete the **First Name**, **Middle Name** (if applicable), and **Last Name** fields.
3. Type the email address in the **Email Address** field.
4. Type the party's date of birth in the **Date of Birth** field, or select a date from the calendar.

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

5. Select the country from the **Country** drop-down list.

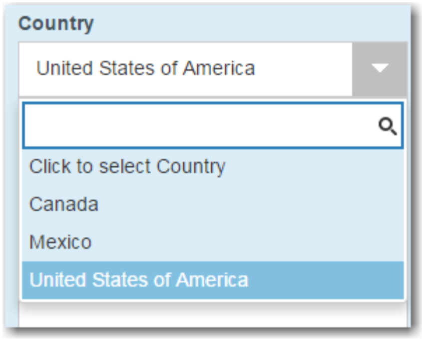


Figure 9.10 – Country Drop-Down List

6. Perform one of the following:

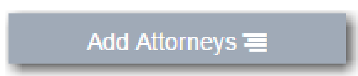
   - For a party in the United States, complete the **Address**, **City**, **State**, **Zip Code**, **Phone Number**, and **Filer ID** fields.
   - For a party in Mexico, complete the **Address**, **City**, **State**, **Postal Code**, **Phone Number**, and **Filer ID** fields.
   - For a party in Canada, complete the **Address**, **City**, **Postal Code**, **Phone Number**, and **Filer ID** fields. Select the province from the **Province** drop-down list.

   Note: The Filer ID field is configured by Tyler and may not be available on your system.

7. Select a lead attorney from the **Lead Attorney** drop-down list.

   Note: If you select Pro Se from the Lead Attorney drop-down list, the system displays "Pro Se" as the lead attorney instead of the party's actual name when viewing filing details.

   After you select a lead attorney, the **Additional Attorneys** field is displayed.

8. To add additional attorneys to the case, click 

.

   Note: The Add Attorneys button can be removed at the client's request.

   The *Add Attorneys* dialog box is displayed.

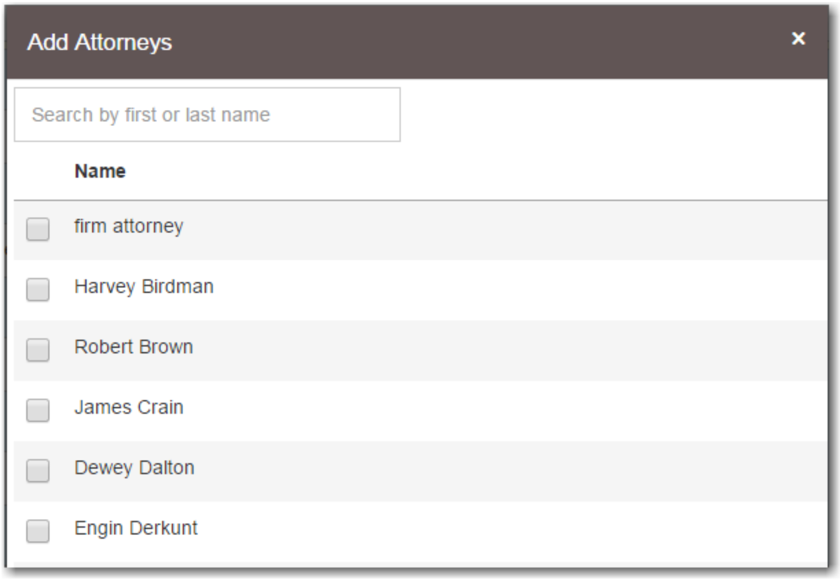


Figure 9.11 – Add Attorneys Dialog Box

9. Select the check box for each attorney that you want to add to the case. When you are finished, click 

.

The additional attorneys that you selected are displayed in the **Additional Attorneys** field.

Figure 9.12 – Lead Attorney and Additional Attorneys Fields

10. Complete the following fields for the party demographics:
    a. Select the party's driver's license type from the **Drivers License Type** drop-down list.

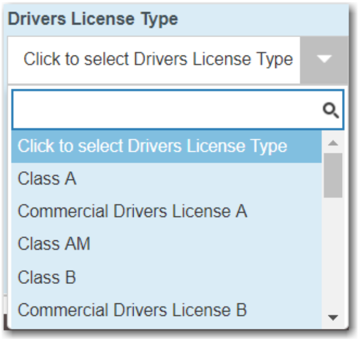


Figure 9.13 – Drivers License Type Drop-Down List

b. Select the state where the party's driver's license was issued from the **Drivers License State** drop-down list.

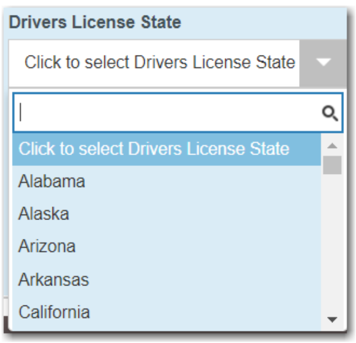


Figure 9.14 – Drivers License State Drop-Down List

c. Type the party's driver's license number in the **Drivers License Number** field.
d. Type the party's Social Security number in the **Social Security Number** field.
e. Select the party's gender from the **Gender** drop-down list.

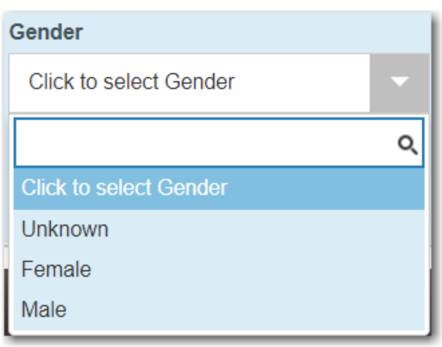


Figure 9.15 – Gender Drop-Down List

f. If an interpreter is needed, select the language from the **Interpreter** drop-down list.

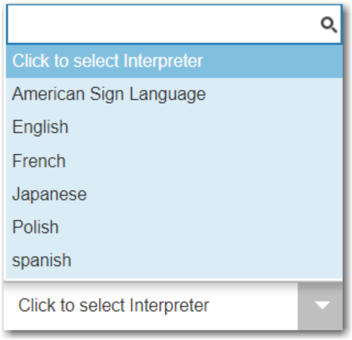
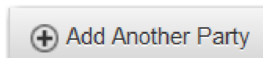


Figure 9.16 – Interpreter Drop-Down List

11. If you want to add another party to the filing, click , and then enter the party information for the second party.

    Note: After you have selected all attorneys for both parties, the lead attorney's name is displayed next to the specified party, along with the number of additional attorneys that are also associated with the party.

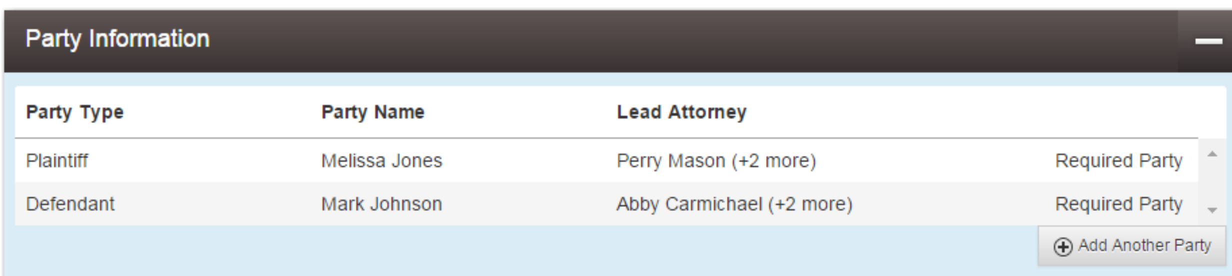


Figure 9.17 – Party Information Section with Lead Attorneys Displayed

12. After completing the fields for all parties, click .

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

Entering Date of Death in Party Information Section

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

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

To enter the date of death in the **Party Information** section, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

    Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

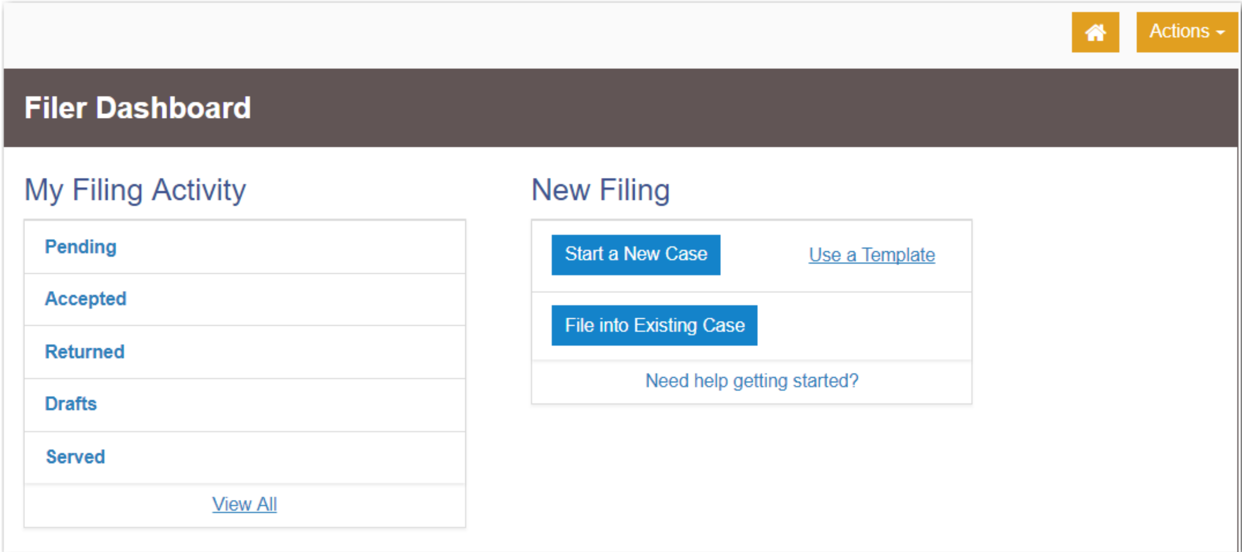


Figure 9.18 – Filer Dashboard Page

The *Start a New Case* page is displayed.

2. Complete the required fields in the **Case Information** section, and then click Save Changes.
3. In the **Party Information** section, select the party type from the **Party Type** drop-down list.

   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.
4. Type the party's name in the **First Name** and **Last Name** fields.
5. Type the email address in the **Email Address** field.
6. Type a date in the **Date of Death** field, or click the calendar to select a date from the calendar.
7. Select the country from the **Country** drop-down list.
8. Perform one of the following:
   - For a party in the United States, complete the **Address**, **City**, **State**, **Zip Code**, **Phone Number**, and **Filer ID** fields.
   - For a party in Mexico, complete the **Address**, **City**, **State**, **Postal Code**, **Phone Number**, and **Filer ID** fields.
   - For a party in Canada, complete the **Address**, **City**, **Postal Code**, **Phone Number**, and **Filer ID** fields. Select the province from the **Province** drop-down list.

   Note: The Filer ID field is configured by Tyler and may not be available on your system.
9. Select a lead attorney from the **Lead Attorney** drop-down list.

   Note: If you select Pro Se from the Lead Attorney drop-down list, the system displays "Pro Se" as the lead attorney instead of the party's actual name when you are viewing filing details.
10. Complete the following fields for the party demographics:

    a. Select the party's driver's license type from the **Drivers License Type** drop-down list.

    b. Select the state where the party's driver's license was issued from the **Drivers License State** drop-down list.

c. Type the party's driver's license number in the **Drivers License Number** field.

d. Type the party's Social Security number in the **Social Security Number** field.

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

f. If an interpreter is needed, select the language from the **Interpreter** drop-down list.

11. If you want to add another party to the filing, click Add Another Party, and then enter the party information for the second party.

    Note: After you have selected all attorneys for both parties, the lead attorney's name is displayed next to the specified party.

12. After completing the fields for all parties, click Save Changes.

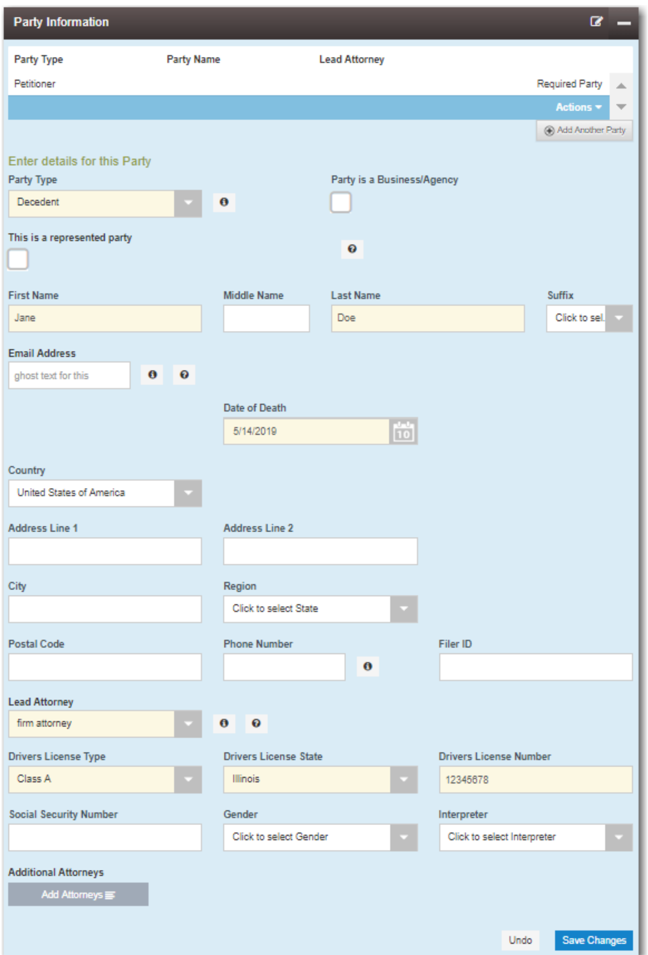


Figure 9.19 – Sample Party Information Section

13. Enter the required information in the **Filings** section, and then click Save Changes.

14. Verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

15. Complete the required fields in the **Fees** section, and then click Save Changes.

16. Click Summary to review a summary of your filing.

17. When you are satisfied with the information in your filing, click Submit.

    A new envelope of your filing is included on the *Filing History* page.

Display “Pro Se” for Party Name

You can select **Pro Se** in the **Lead Attorney** field when filing a case, filing into an existing case, or filing a case using a template.

Pro Se is displayed for the specified party in place of the party’s actual name in the following places in the system:

- On case filing screens, including when using templates

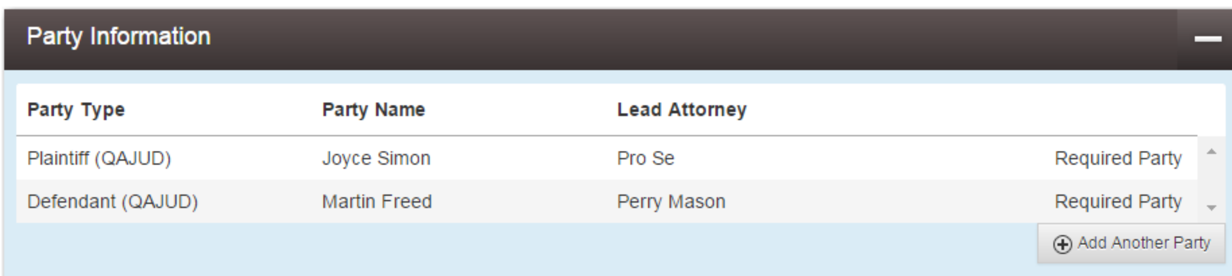


Figure 9.20 – Party Information Section on Case Filing Screen

- When viewing envelope details

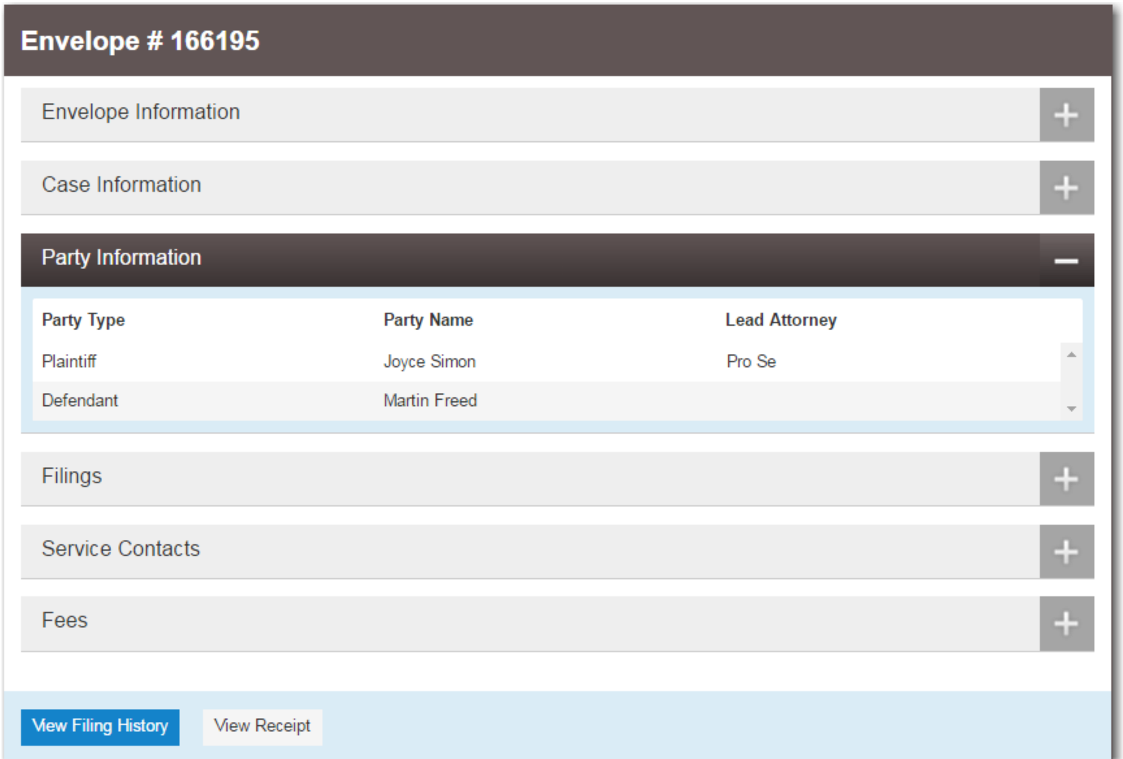


Figure 9.21 – Envelope Page Displaying Filing Details

Entering Filing Details

The **Filings** section allows you to enter the filing details and calculate the fees associated with the filing.

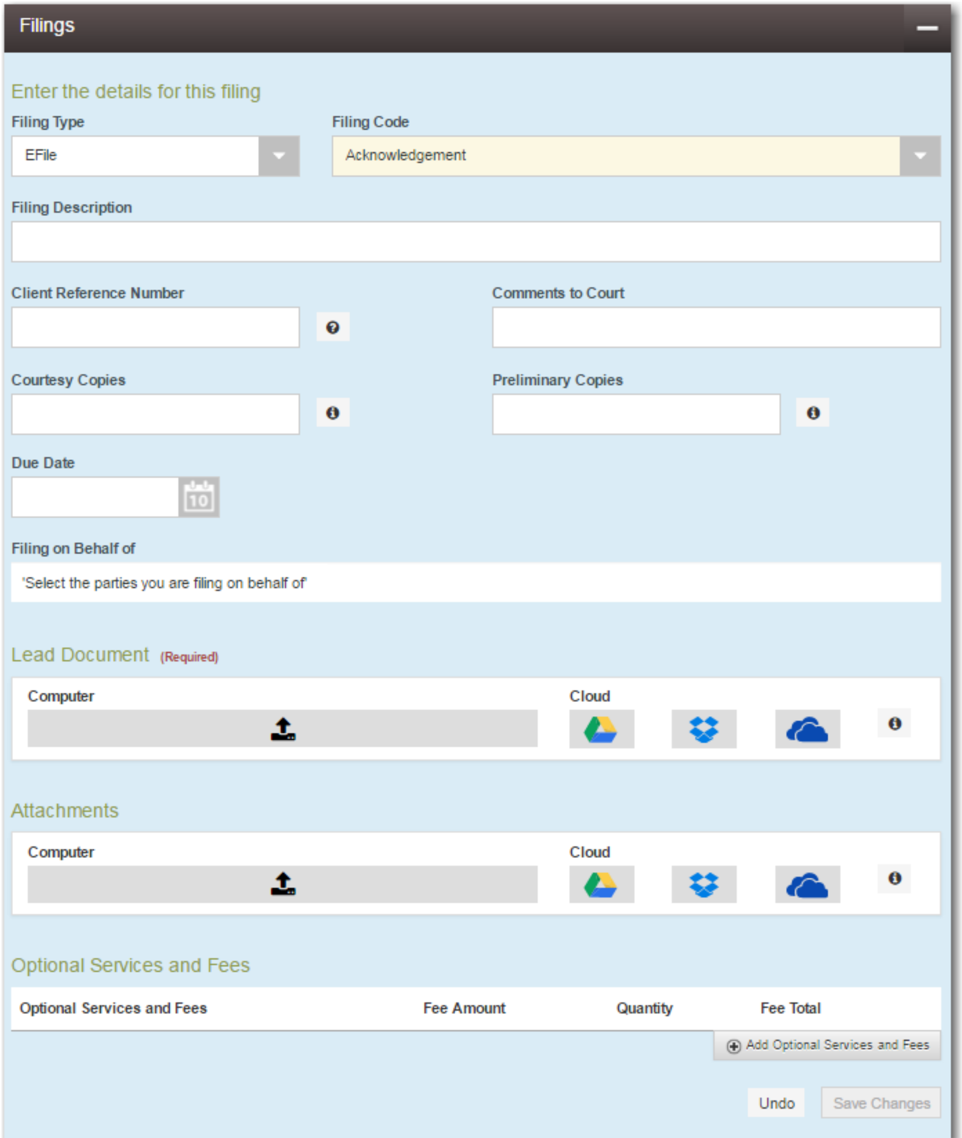


Figure 9.22 – Filings Section

To enter the filing details, perform the following steps:

1. Enter the filing details for the case in the **Filings** section:
   a. Select a filing type from the **Filing Type** drop-down list.
   b. Select a filing code from the **Filing Code** drop-down list.

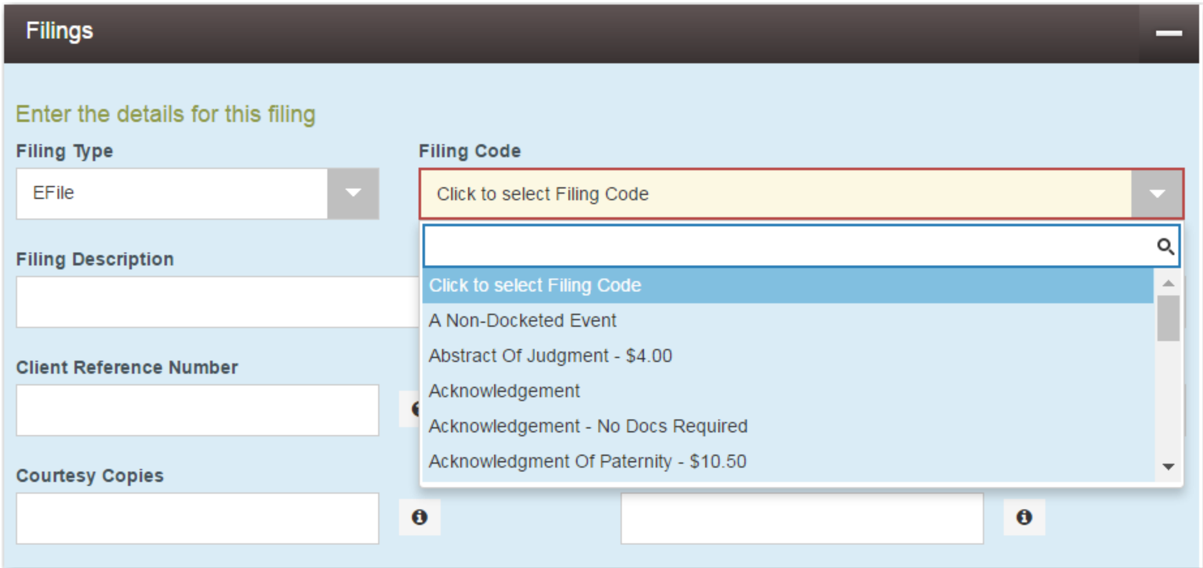


Figure 9.23 – Filing Code Drop-Down List

Note: Depending on your system configuration, some filing codes cause the Due Date field to be enabled.

After you select the filing code, the fee associated with the filing code is displayed.

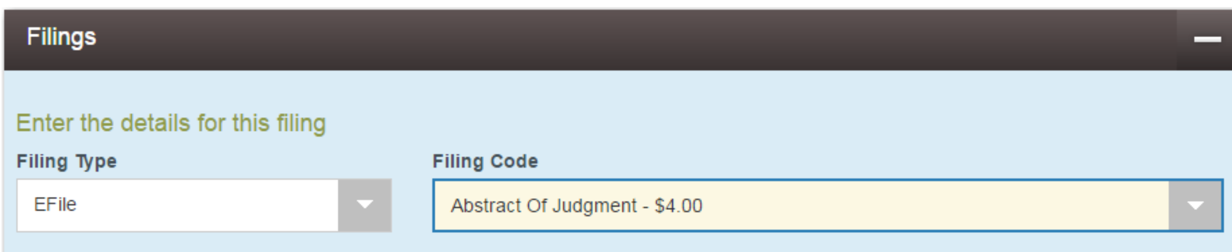


Figure 9.24 – Filing Code Drop-Down List with the Fee Displayed

c. Type a description of the filing in the **Filing Description** field.
d. Type a client reference number in the **Client Reference Number** field.

   Note: A client reference number is a client-created number for internal purposes only. Most courts do not see or refer to the Client Reference Number field for the filing. This is an optional field.
e. Type any relevant comments in the **Comments to Court** field.
f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.
g. If you want to send preliminary copies of the filing to another party, type the recipient's email address in the **Preliminary Copies** field.
h. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

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

   A calendar is displayed from which you can select the specified date.

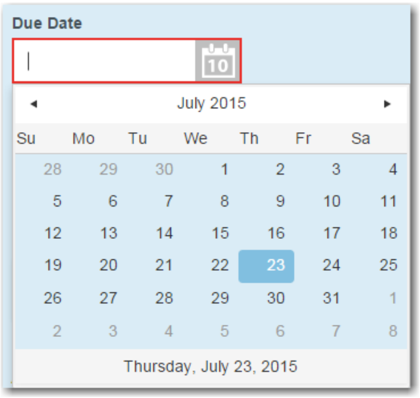


Figure 9.25 – Due Date Calendar

i. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

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

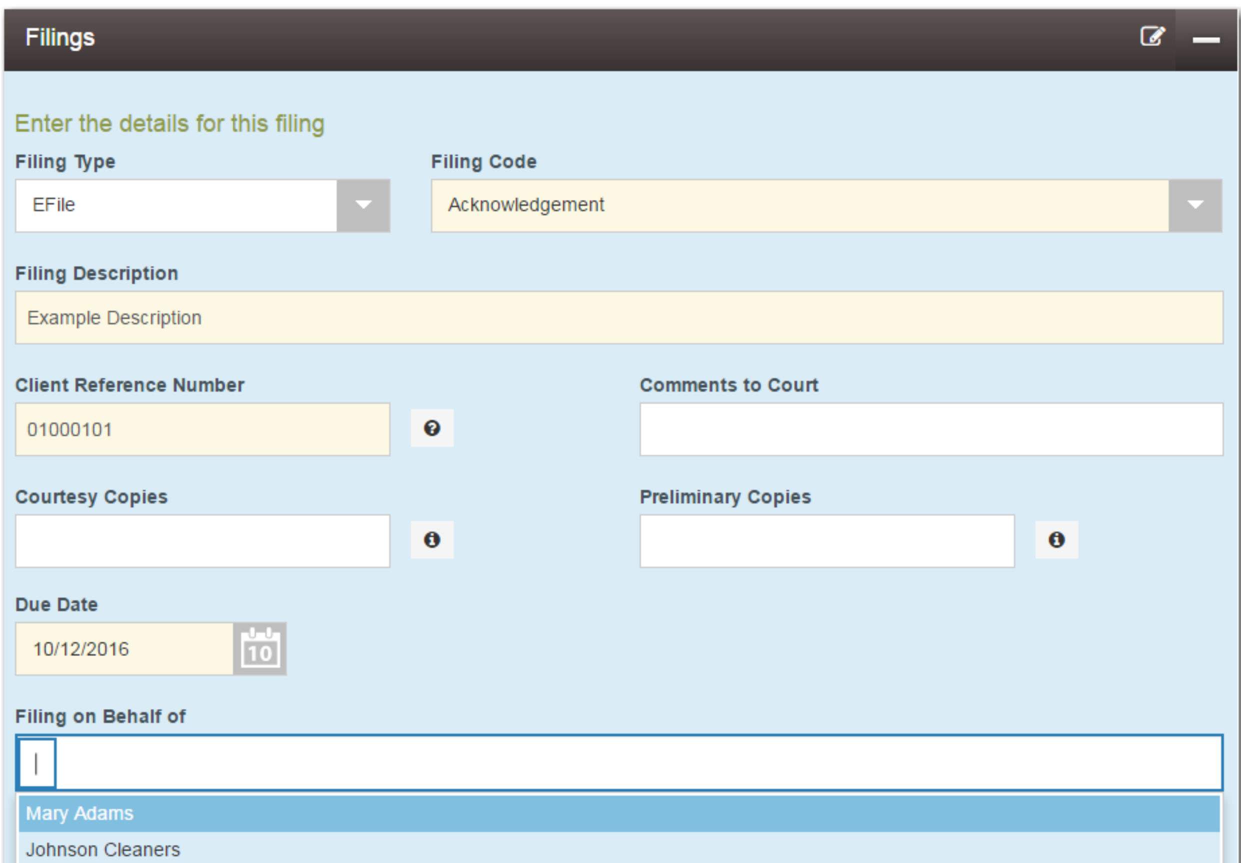


Figure 9.26 – Filing on Behalf of Field in the Filings Section

j. Click the **Lead Document** field to select a lead document to upload. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following

cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. You can upload only one document as a lead document.

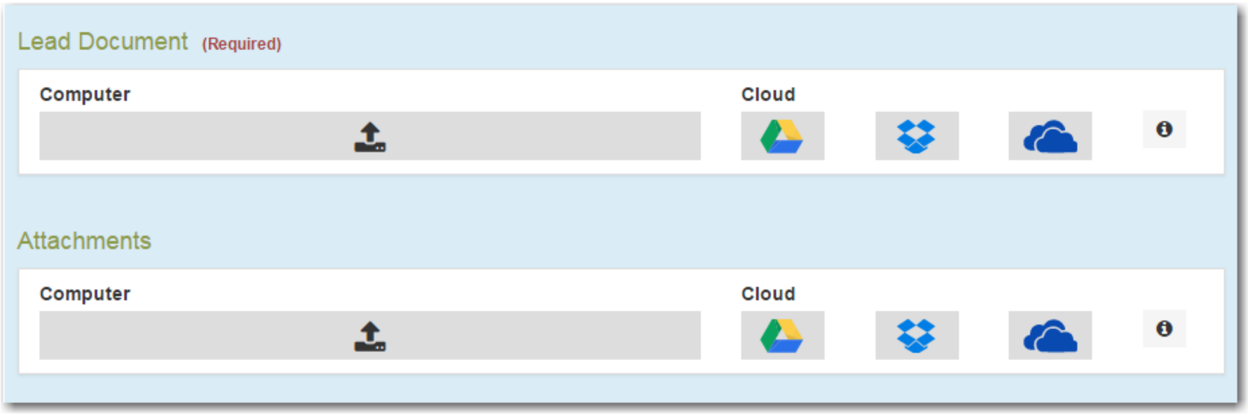


Figure 9.27 – Lead Document and Attachments Fields in the Filings Section

k. Type a name for the lead document in the **Description** field.

Note: Tyler can configure a maximum length for the document name at the client's request. When the maximum length is configured, if you assign a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

l. Select the level of security to attach to the document from the **Security** drop-down list.

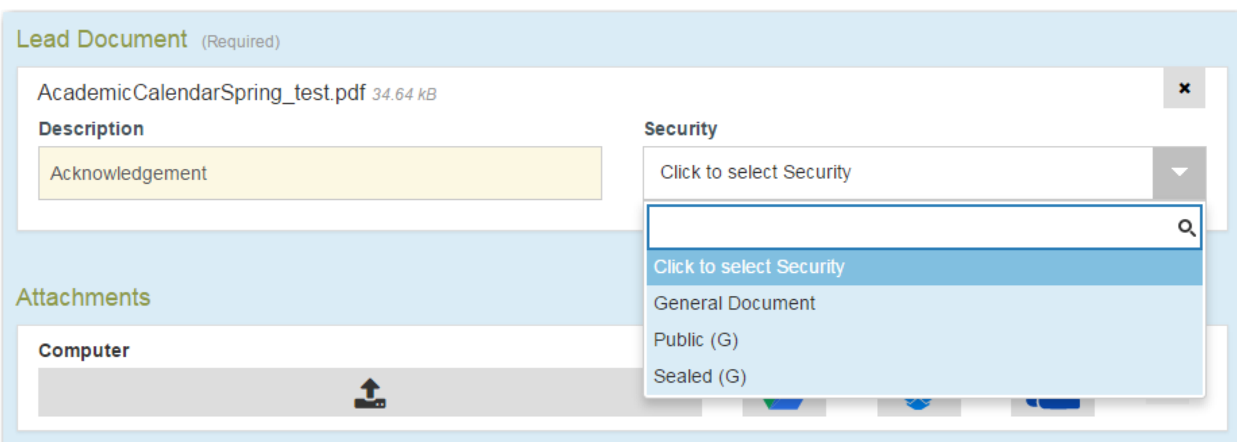


Figure 9.28 – Security Drop-Down List in the Lead Document Section

m. If you have attachments to upload, click the **Attachments** field to select the documents to upload. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

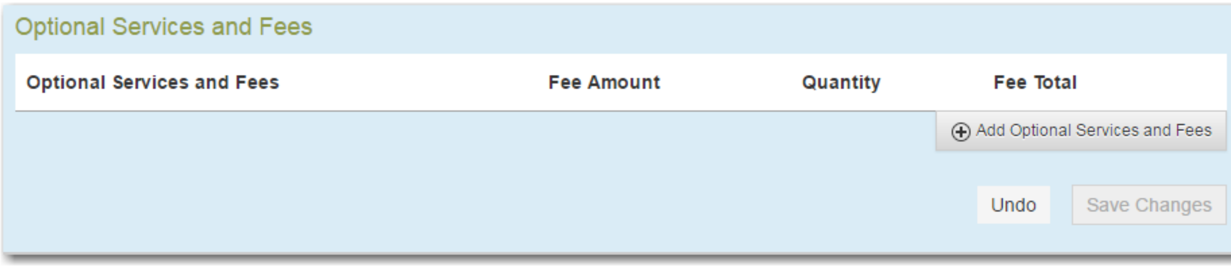
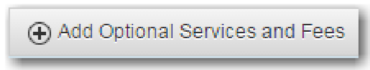


Figure 9.29 – Optional Services and Fees Section

n. If you want to add an optional service to the filing, click 

.

The **Optional Services and Fees** field is displayed.

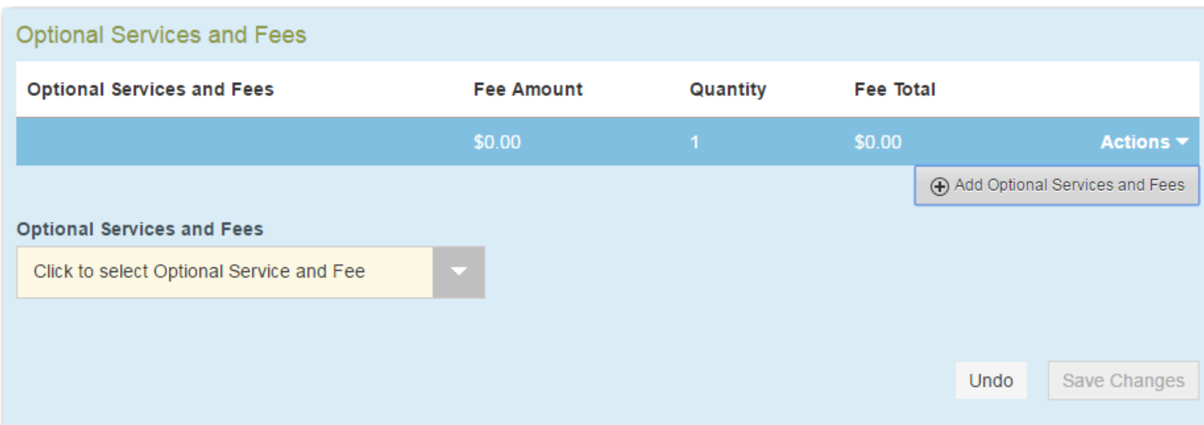


Figure 9.30 – Optional Services and Fees Field in the Optional Services and Fees Section

o. Select the appropriate option from the **Optional Services and Fees** drop-down list.

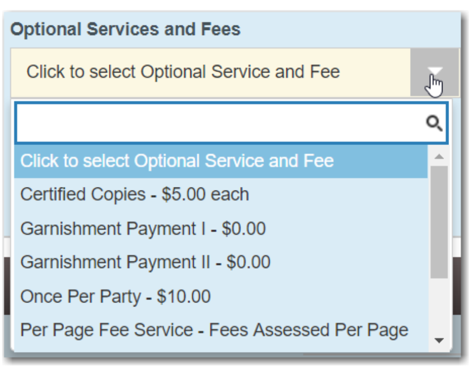


Figure 9.31 – Optional Services and Fees Drop-Down List

The **Enter amount to be paid** field is displayed.

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

Note: The wording displayed on your system may differ from the example provided.

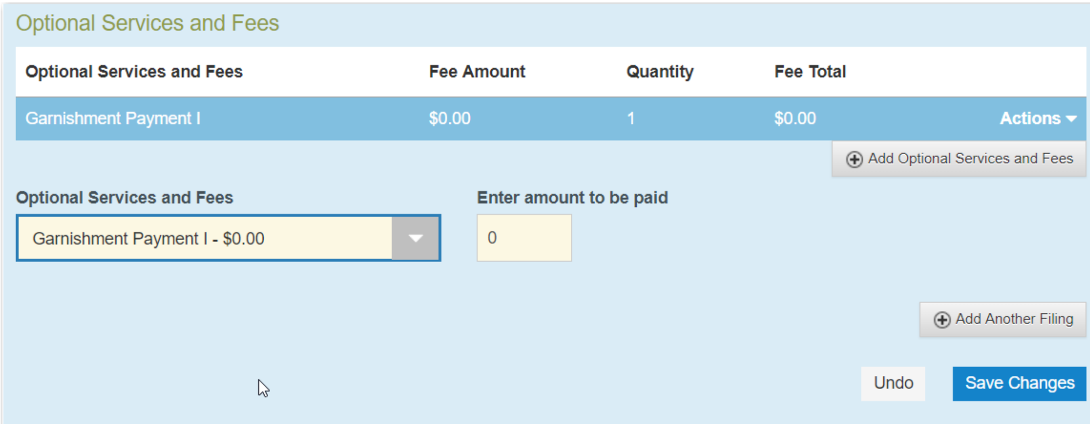


Figure 9.32 – Example of an Optional Services and Fees Section with the Enter Amount to Be Paid Field Displayed

p. Enter the fee for the optional service in the **Enter amount to be paid** field.

q. Click 

.

The fee that you entered is displayed in the **Fee Total** column.

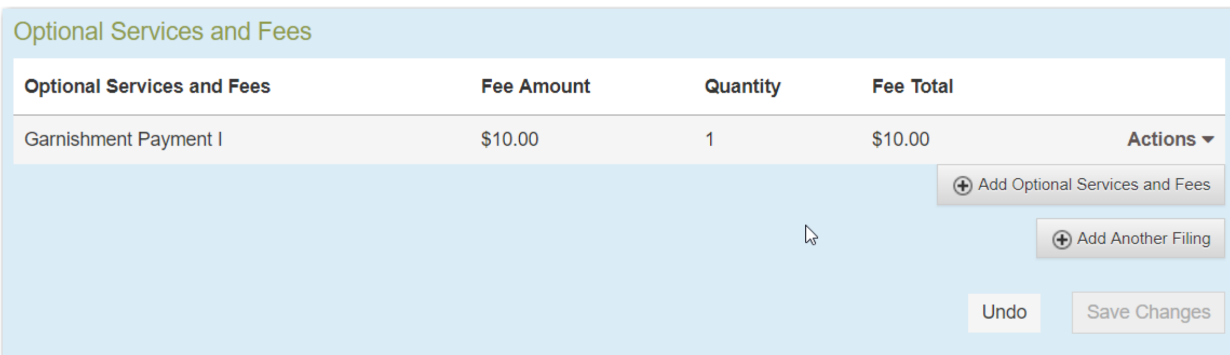


Figure 9.33 – Optional Services and Fees Section with the Fee Amount Displayed

r. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

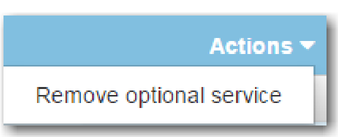
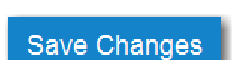


Figure 9.34 – Optional Service Actions Drop-Down List

s. When you are done adding optional services, click 

.

Figure 9.35 – Optional Services and Fees Section with Optional Services Saved

> **Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.**

t. If you want to add another filing to the case, click Add Another Filing.

   The top of the **Filings** section is displayed, where you can begin another filing.

u. Click Save Changes to save your changes, or click Undo to cancel the action.

2. After you have added all of the filings to the case and saved the changes, verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

   Note: If you forget to add your name to the service contact list, the system will automatically add it for you, if the system is configured to do so.

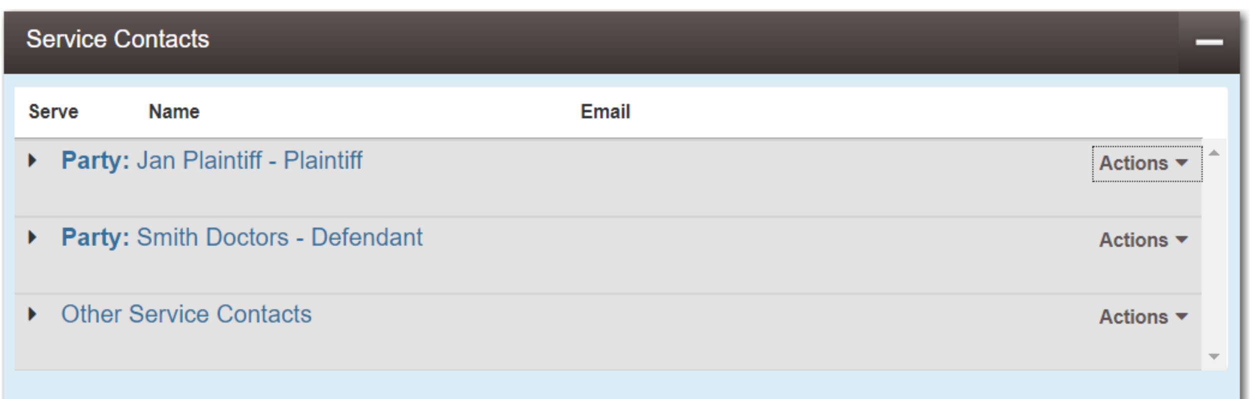


Figure 9.36 – Service Contacts Section

3. Complete the fields in the **Fees** section.

   Note: Your credit card is authorized when submitted. However, the transaction fees are not posted to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.

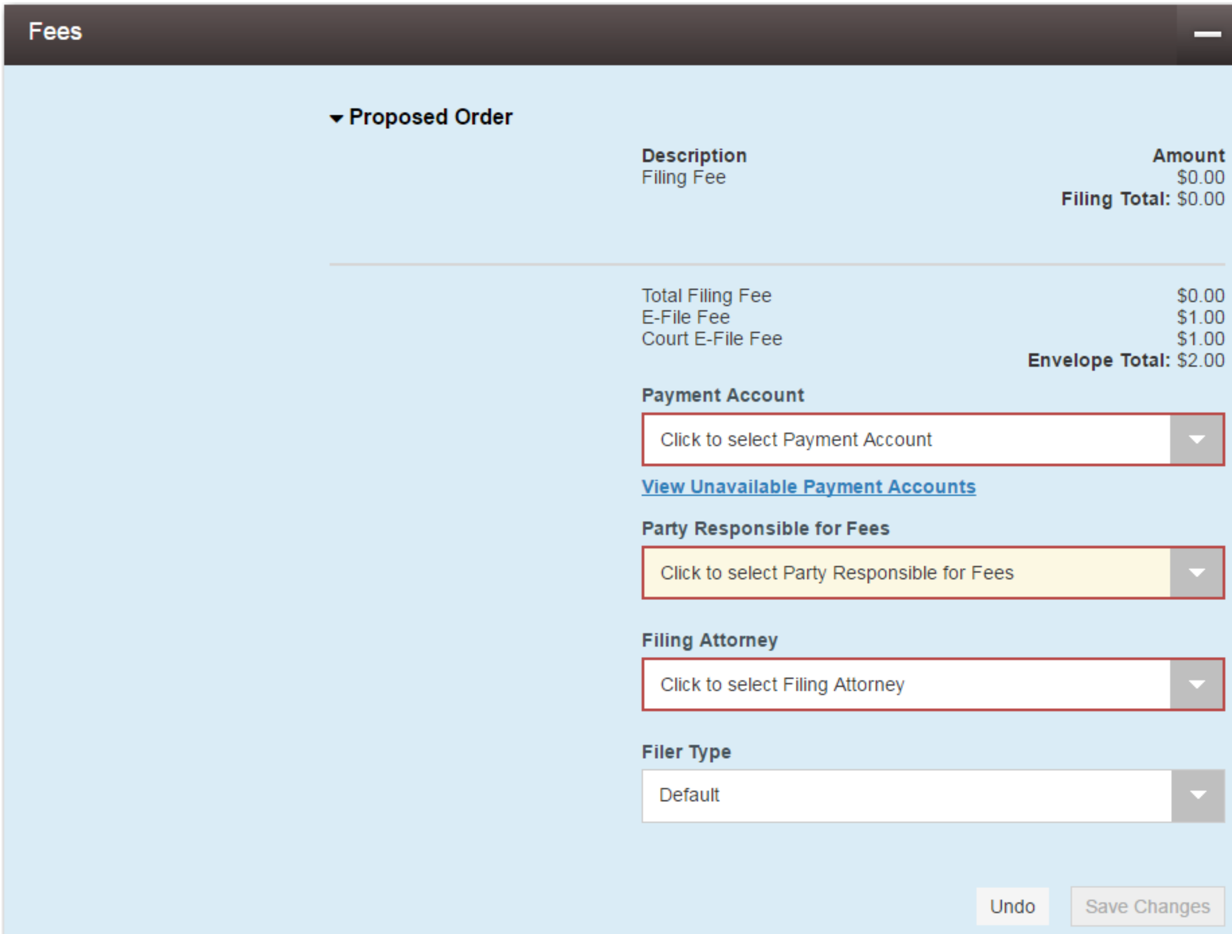


Figure 9.37 – Fees Section

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

   Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

b. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

c. Select the filing attorney from the **Filing Attorney** drop-down list.

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

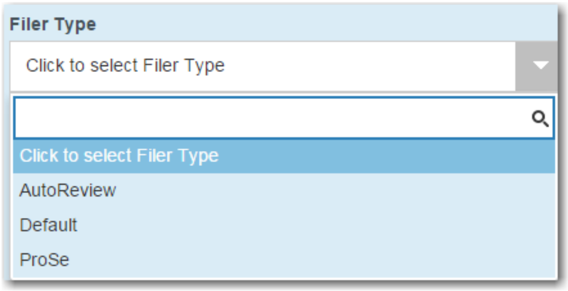


Figure 9.38 – Filer Type Drop-Down List

e. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.

4. In the **Submission Agreements** section, select the check box for the appropriate submission agreement.

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

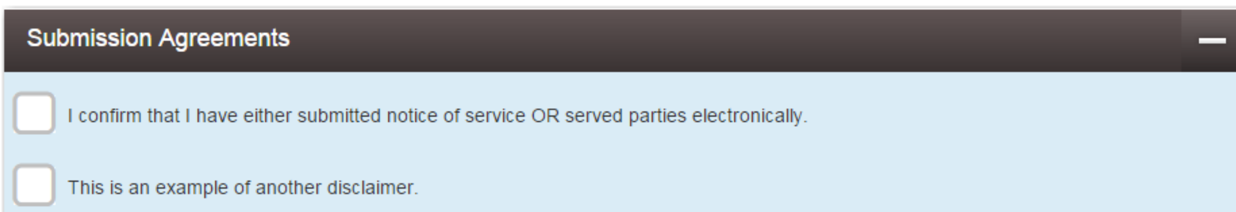


Figure 9.39 – Submission Agreements Section

5. After completing the fields in all of the sections on the page, perform one of the following actions:

   - Click **Save as Draft** to stop working on your filing and resume work at a later time.
   - Click **Summary** to review a summary of your filing.

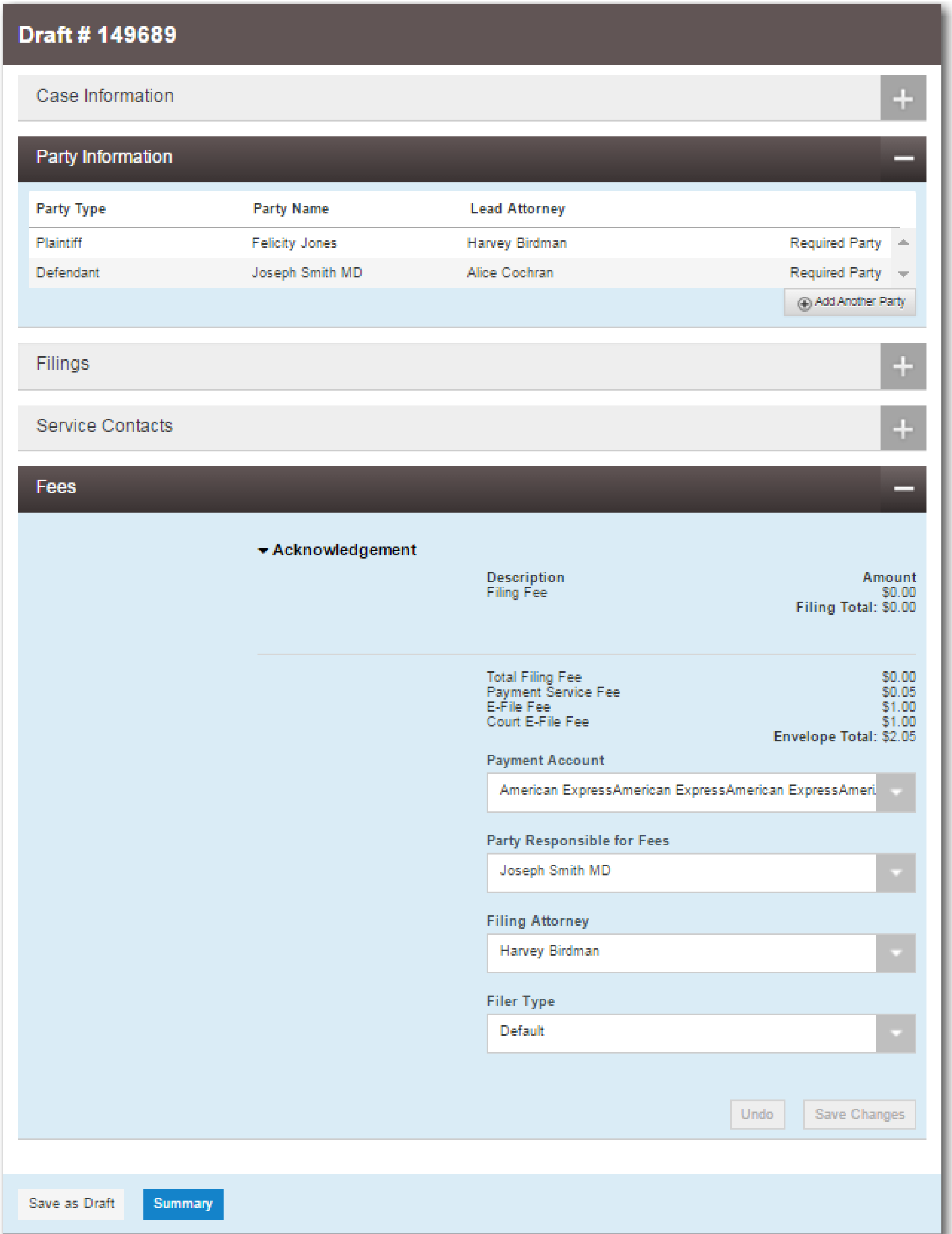


Figure 9.40 – Draft of Filing Page

Note: To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

6. If you clicked Summary, review the filing for accuracy. If you need to make any changes, click Back to return to the previous page. Make any necessary corrections, and then click Summary again.

7. When you are satisfied with the information in your filing, click **Submit**.

   A new **Envelope** of your filing is included on the *Filing History* page.

Capability for Filing Return Date

Filers can select a date by which the respondent must respond to the filing. Filers select the return date when they enter filing details for a case.

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

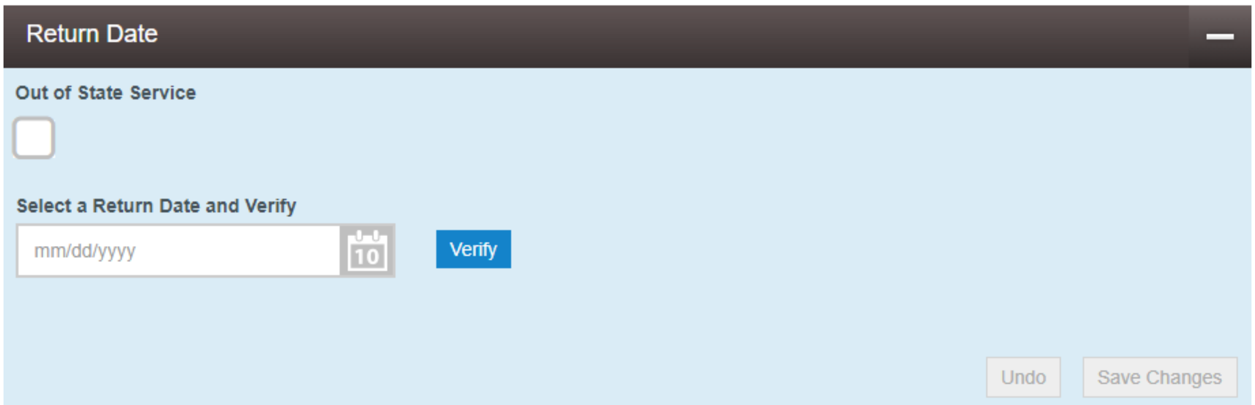


Figure 9.41 – Return Date Section

After selecting a return date, you must click **Verify** to check whether the selected date is available.

If the selected date is verified, you will receive confirmation.

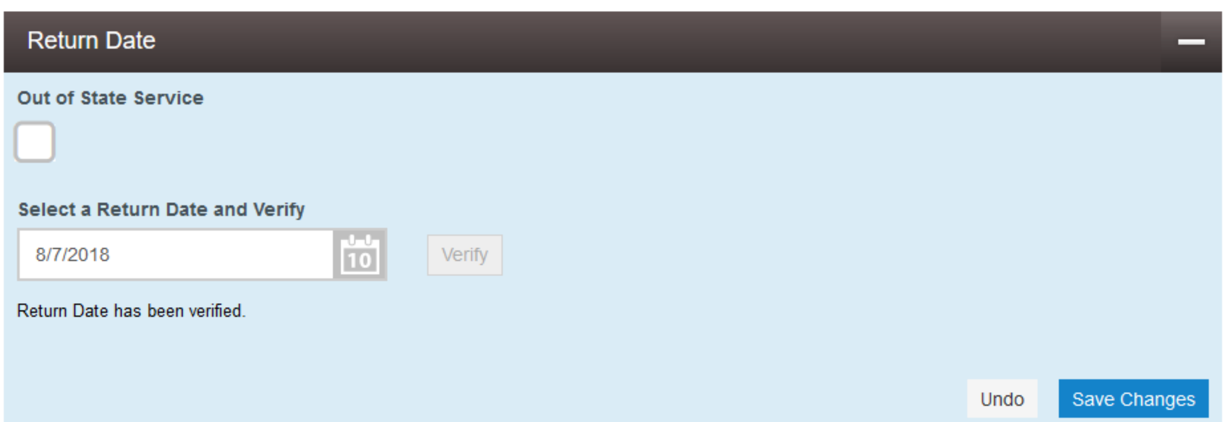


Figure 9.42 – Return Date Section – Return Date Verified

If the selected date is not verified, the system may change the date. If the date is changed, you will receive a notification that the date has changed.

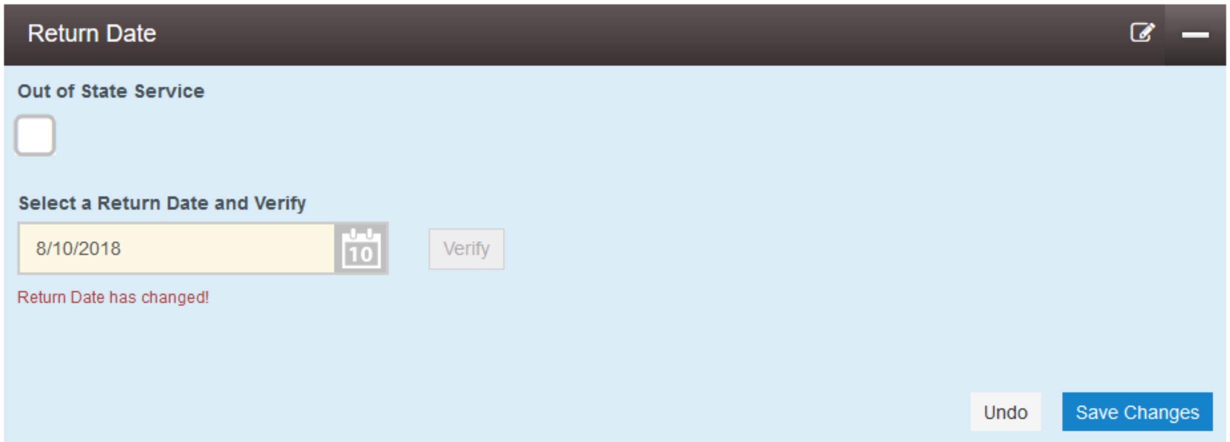


Figure 9.43 – Return Date Section – Return Date Changed

If you attempt to skip the **Return Date** section, you will receive a message indicating that the return date has not been verified. After the date has been verified, you must save the date.

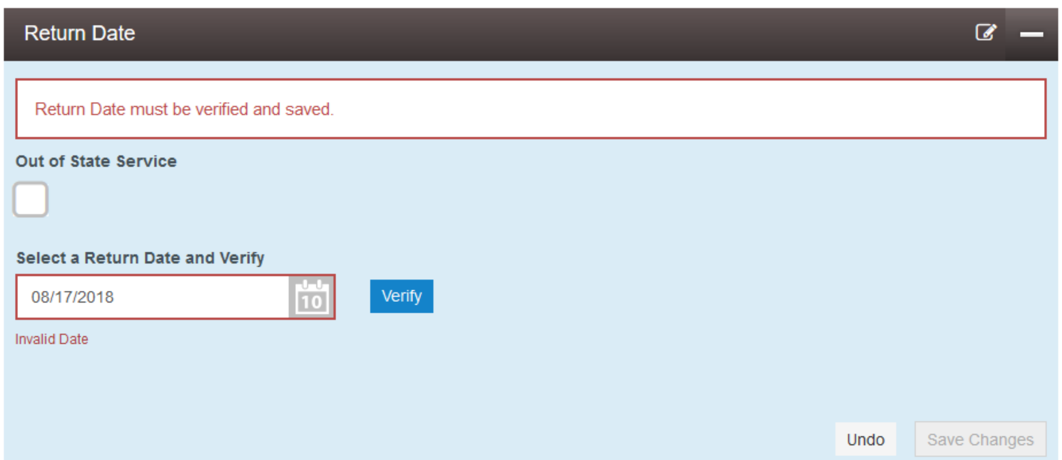


Figure 9.44 – Return Date Section – Return Date Not Entered, Verified, and Saved

If the system determines during verification that the return date is not applicable, a message will prompt you to save the filing.

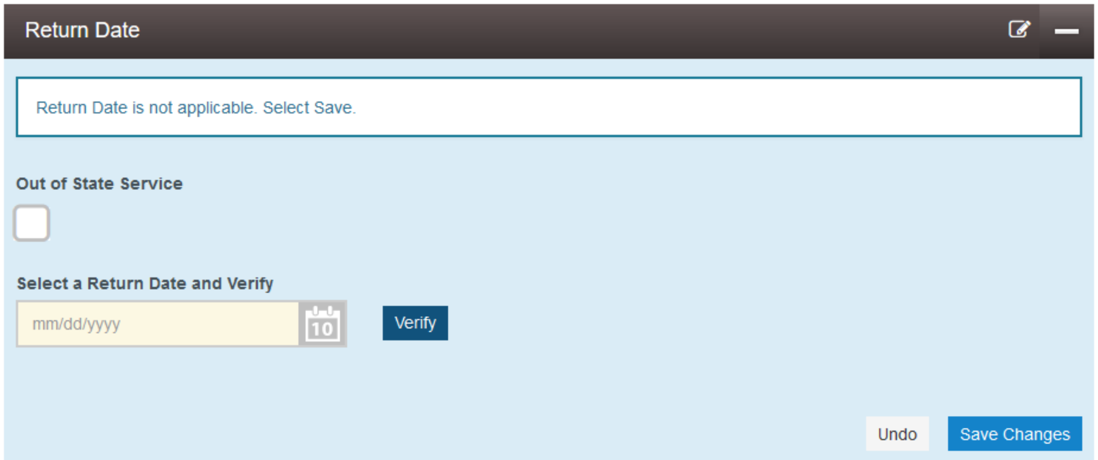


Figure 9.45 – Return Date Section – Date Not Applicable

Selecting a Return Date for a Case Filing

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

To select a return date for a case filing, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

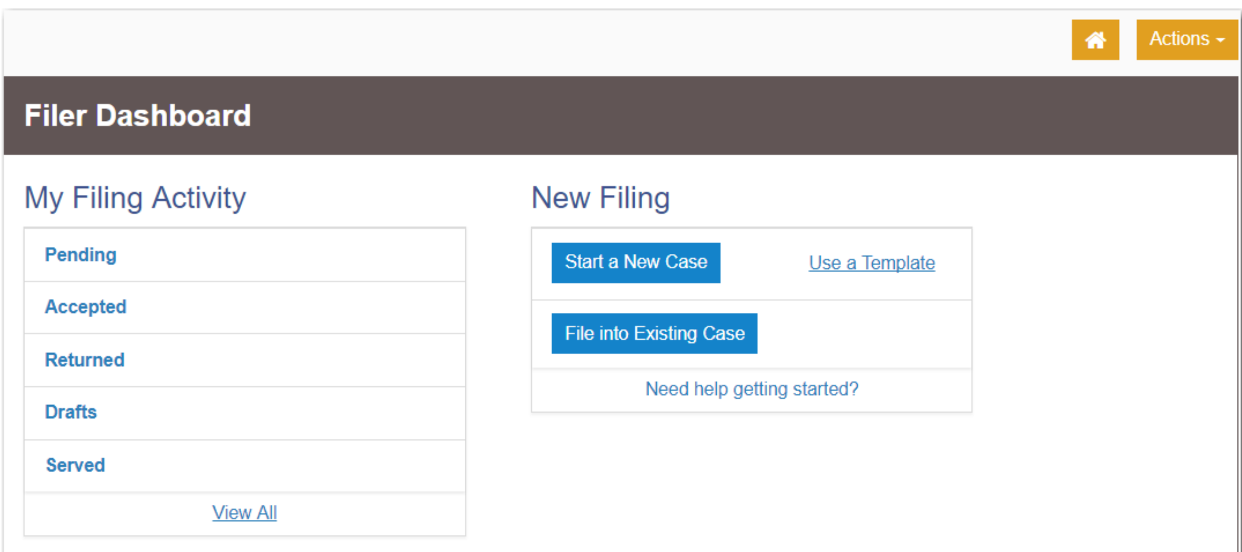


Figure 9.46 – Filer Dashboard Page

   The *Start a New Case* page is displayed.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section.
3. Complete the required fields in the **Party Information** section.

4. Verify that the service contacts are correct in the **Service Contacts** section. Make any additions as needed.
5. Complete the required fields in the **Fees** section.
6. In the **Return Date** section, perform the following steps:

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

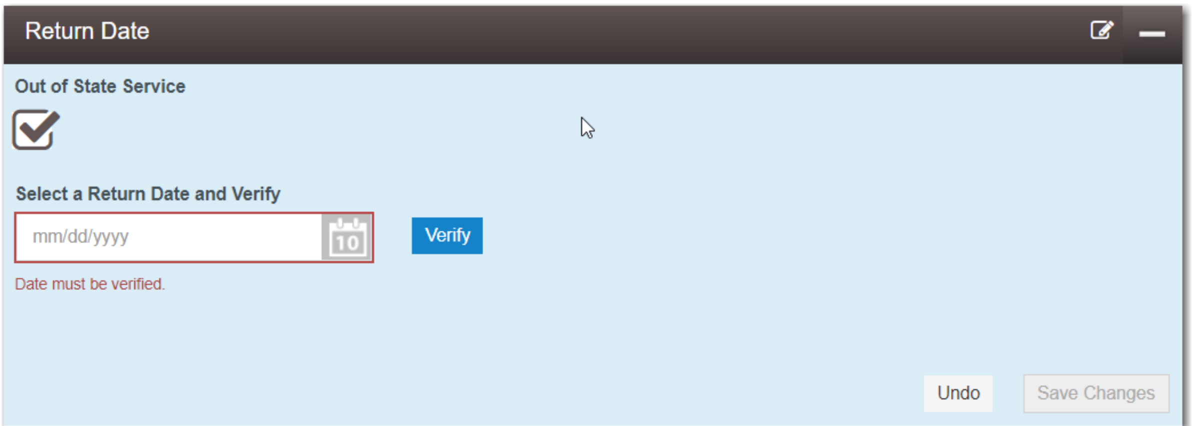


Figure 9.47 – Return Date Section with the Out of State Service Check Box Selected

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

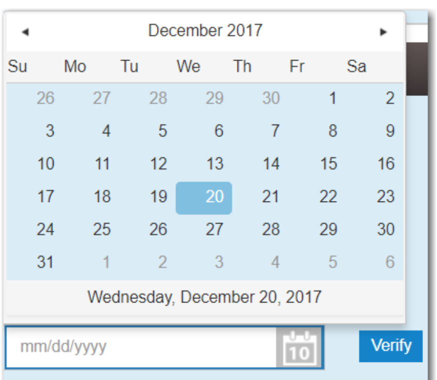


Figure 9.48 – Return Date Calendar

    c. Click 
.

    If the selected date is verified, you will receive confirmation.

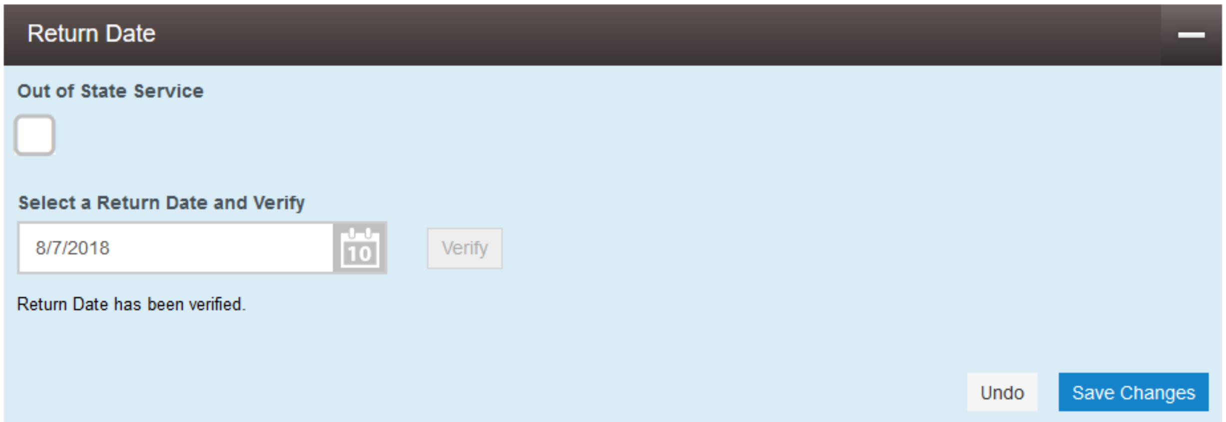


Figure 9.49 – Return Date Section – Return Date Verified

If the selected date is not verified, the system may change the date. If the date is changed, you will receive a notification that the date has changed.

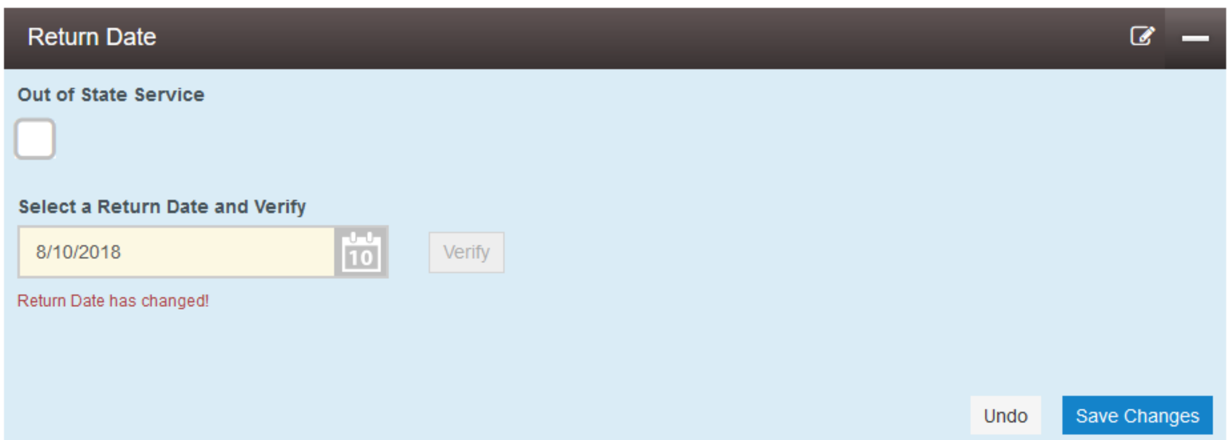


Figure 9.50 – Return Date Section – Return Date Changed

d. If the selected return date is not applicable, a system message will prompt you to save the filing.

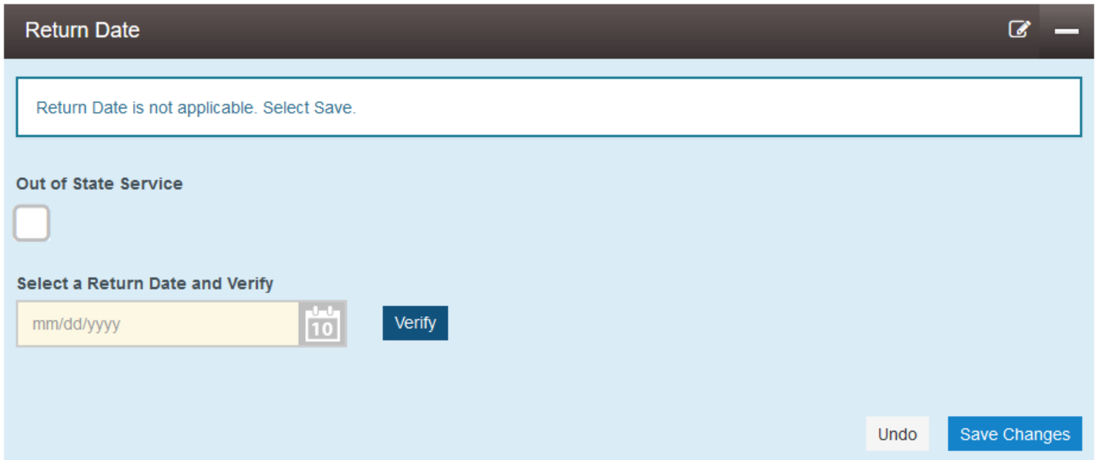


Figure 9.51 – Return Date Section – Date Not Applicable

e. Click Save Changes .

7. Click Summary to review a summary of your filing.

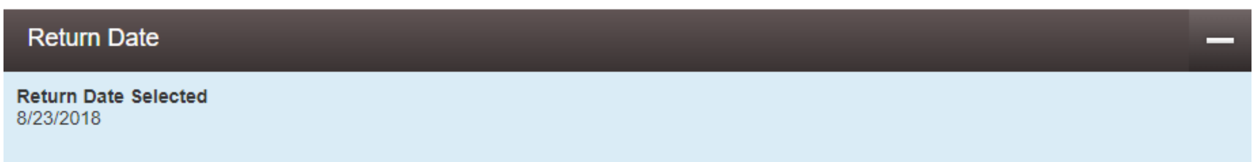


Figure 9.52 – Return Date Section with the Return Date Displayed

8. Review the filing for accuracy. If you need to make any changes, click Back to display the previous page. Make any necessary corrections, and then click Summary again.

9. When you are satisfied with the information in your filing, click Submit .

Reverify Return Date

The system forces users to verify the return date if certain data in the filing changes before the filing was completed.

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

The system forces the filer to verify the return date when any of the following fields change:

- Location
- Case Category
- Case Type

- Party Connection Type
- Attorney
- Lead Attorney
- Filing Code
- Filing Attorney
- Case Cross References

Filers who resume a draft of a filing and subsequently change any of the specified fields are also forced to verify the return date before they can complete the filing.

Reverifying a Return Date

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

To reverify the return date, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select either **Start a New Case** (to enter a new case filing) or **Filing History** (to resume a draft).
2. Enter the details for the case filing, or continue with your draft filing.
3. In the **Return Date** section, select the return date and verify it, but do not save your changes.
4. Next, make changes to one or more of the specified fields of the filing.

   The **Return Date** section is displayed again with a message indicating that the return date must be verified.

   Note: The system forces you to reverify the return date to ensure that the date is still valid because you changed one or more of the specified fields.

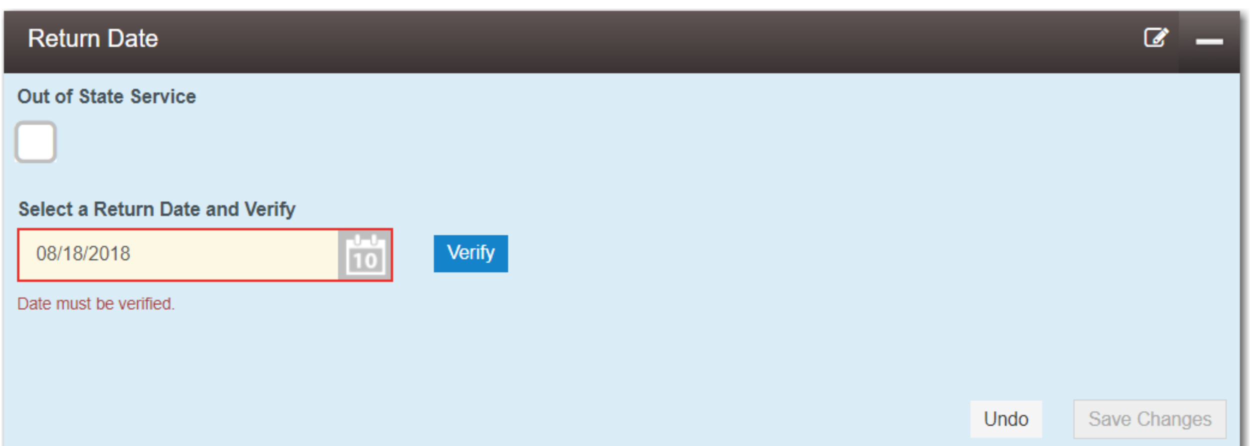


Figure 9.53 – Return Date Section

5. Select a return date, and then click 

.

   The system will either verify your selected return date, or assign a new date.

6. Click Save Changes.
7. Click Summary to review a summary of your filing.
8. Review the filing for accuracy. If you need to make any changes, click Back to display the previous page.
9. Make any necessary corrections, and then click Summary again.
10. When you are satisfied with the information in your filing, click Submit.

Capability for Filing Hearing Date

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

Filers can search for available hearing dates and then select a specified date. The hearing date is reserved in the 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 *Request Hearing Date* dialog box.

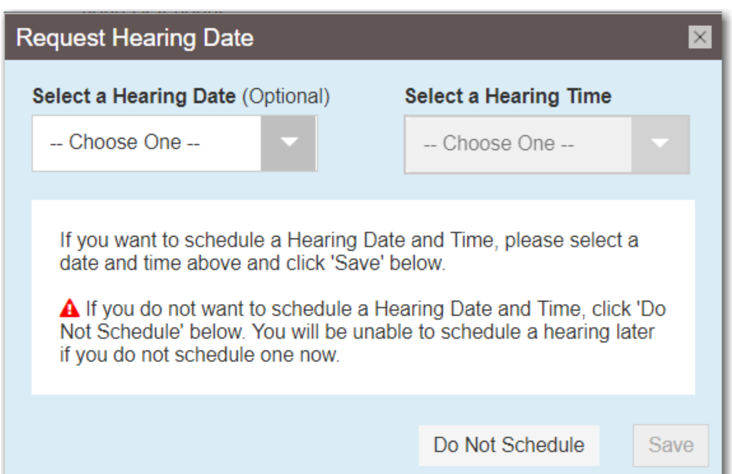


Figure 9.54 – Request Hearing Date Dialog Box

If the filer requests a hearing date that is not available, an error message is displayed.

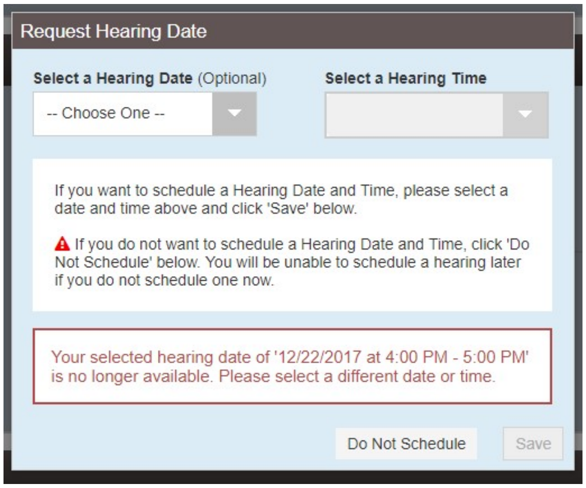


Figure 9.55 – Request Hearing Date Dialog Box Showing Unavailable Hearing Date

If the system is unable to display available hearing dates, an error message directing the filer to try again is displayed.

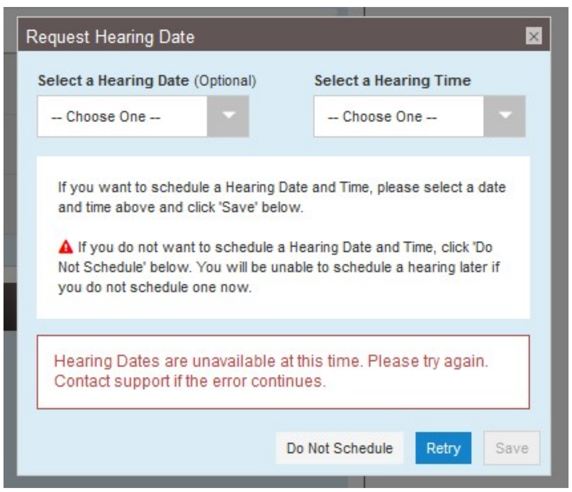


Figure 9.56 – Request Hearing Date Dialog Box Showing That the System is Unavailable

If the filer is unable to schedule a hearing, an error message indicating that the reservation failed is displayed.

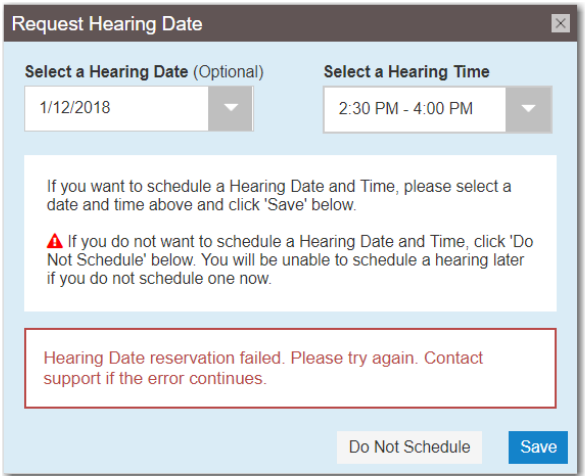


Figure 9.57 – Request Hearing Date Dialog Box Showing a Failed Reservation

After a hearing has been scheduled, the date and time of the hearing are displayed on the *Envelope* page.

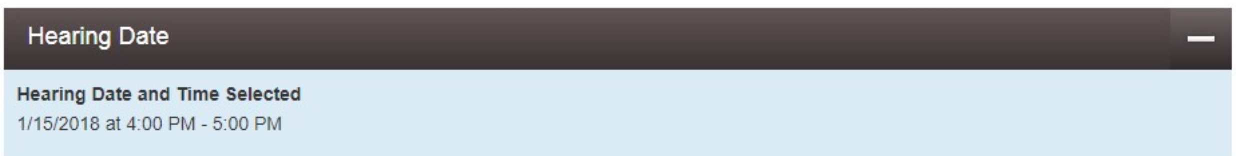


Figure 9.58 – Hearing Date Section on the Envelope Page

Scheduling a Hearing Date for a New Case Filing

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

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

To schedule a hearing for a new case filing, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

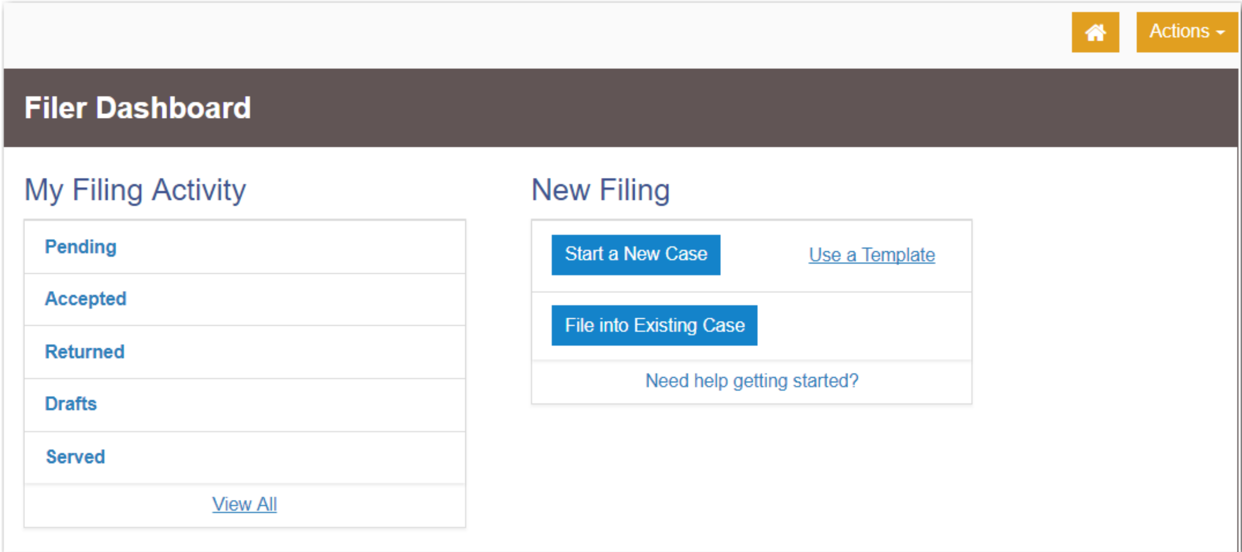


Figure 9.59 – Filer Dashboard Page

The *Start a New Case* page is displayed.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section.
3. Complete the required fields in the **Party Information** section.
4. Verify that the service contacts are correct in the **Service Contacts** section. Make any additions as needed.
5. Complete the required fields in the **Fees** section.
6. After completing the fields in all of the sections on the page, click Summary to review a summary of your filing.
7. Review the filing for accuracy. If you need to make any changes, click Back to display the previous page. Make any necessary corrections, and then click Summary again.
8. When you are satisfied with the information in your filing, click Submit.

   The *Request Hearing Date* dialog box is displayed.

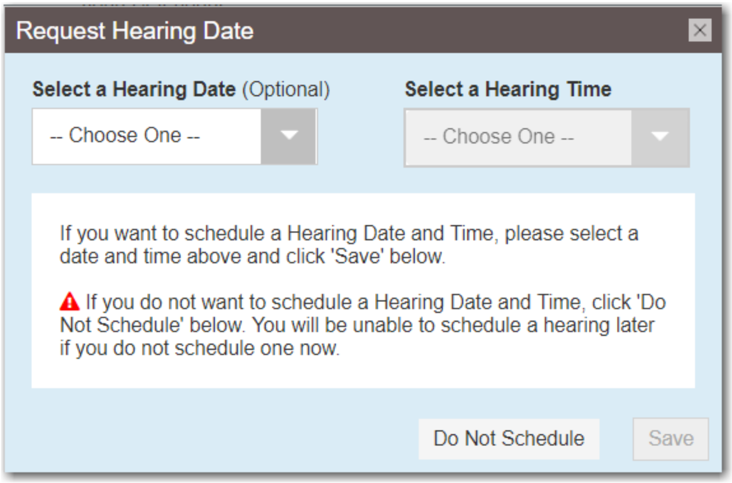


Figure 9.60 – Request Hearing Date Dialog Box

9. Select a hearing date from the **Select a Hearing Date** drop-down list.

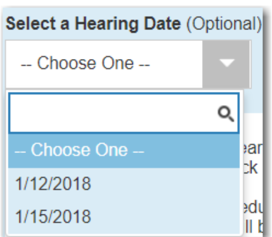


Figure 9.61 – Select a Hearing Date Drop-Down List

10. Select a hearing time from the **Select a Hearing Time** drop-down list.

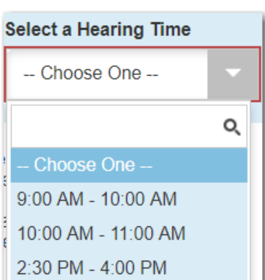


Figure 9.62 – Select a Hearing Time Drop-Down List

11. Click Save.

If the date and time that you selected are available, the system saves your selections. If the date and time that you selected are not available, an error message is displayed. If an error message is displayed, follow the directions provided in the message.

Note: If you do not want to schedule a hearing at this time, click Do Not Schedule on the *Request Hearing Date* dialog box. A hearing will not be scheduled now, but you can schedule a hearing at a later time on the *Envelope* page.

Scheduling a Hearing Date for an Existing Case Filing

You can schedule a hearing for a case filing for which no hearing was previously scheduled.

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

To schedule a hearing for an existing case filing, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Filing History**.

   The *Filing History* page is displayed.
2. Locate the case for which you want to schedule a hearing.
3. From the **Actions** drop-down list for the specified case, select **View Filing Details**.

   The *Envelope* page for the specified case is displayed.
4. Locate the **Hearing Date** section.

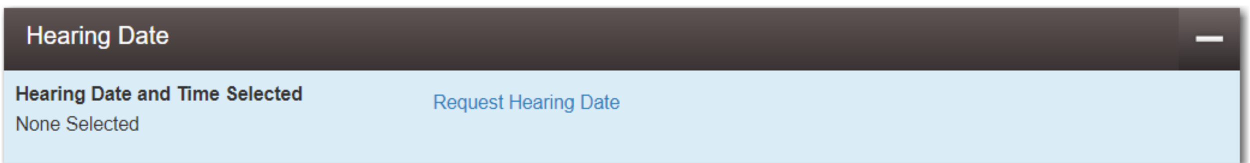
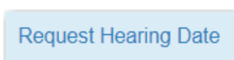


Figure 9.63 – Hearing Date Section on the Envelope Page – No Hearing Previously Scheduled

5. Click .

   The *Request Hearing Date* dialog box is displayed.

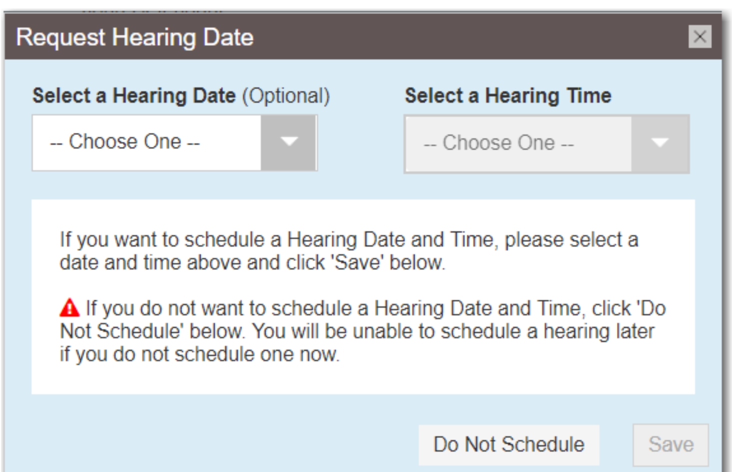


Figure 9.64 – Request Hearing Date Dialog Box

6. Select a hearing date from the **Select a Hearing Date** drop-down list.

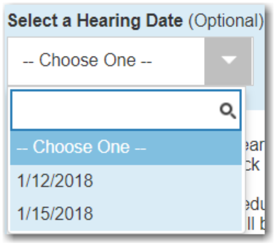


Figure 9.65 – Select a Hearing Date Drop-Down List

7. Select a hearing time from the **Select a Hearing Time** drop-down list.

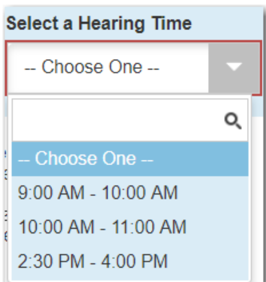


Figure 9.66 – Select a Hearing Time Drop-Down List

8. Click 

.

   If the date and time that you selected are available, the system saves your selections. If the date and time that you selected are not available, an error message is displayed. If an error message is displayed, follow the directions provided in the message.

Entering a Filing with an Ad Damnum Amount

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

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

To enter filing details, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

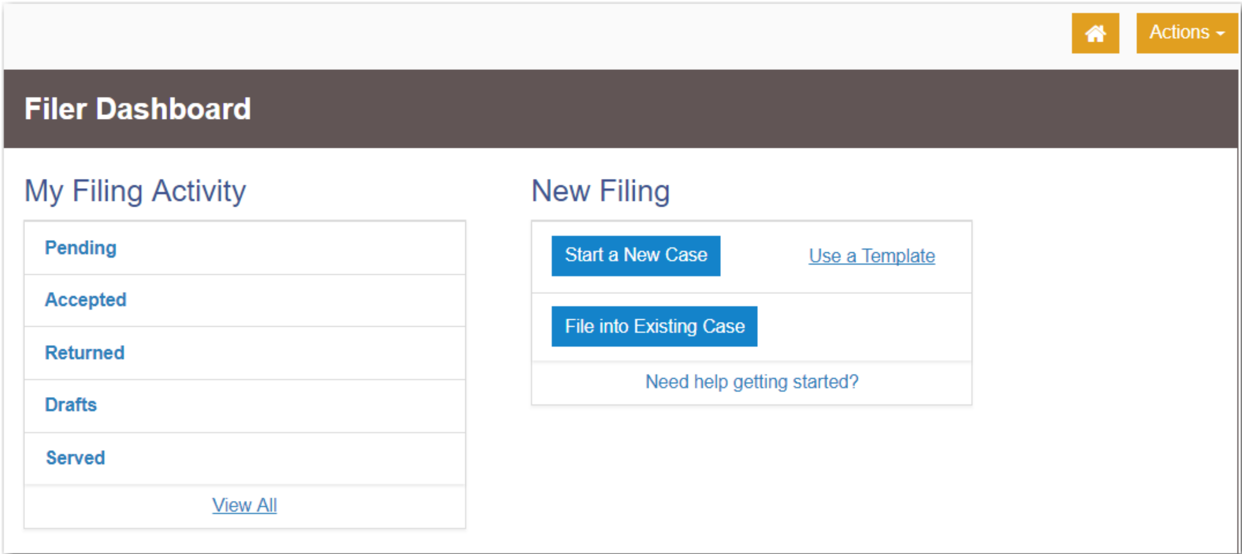


Figure 9.67 – Filer Dashboard Page

The *Start a New Case* page is displayed.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section.
3. Complete the required fields in the **Party Information** section.
4. Enter the filing details for the case in the **Filings** section:

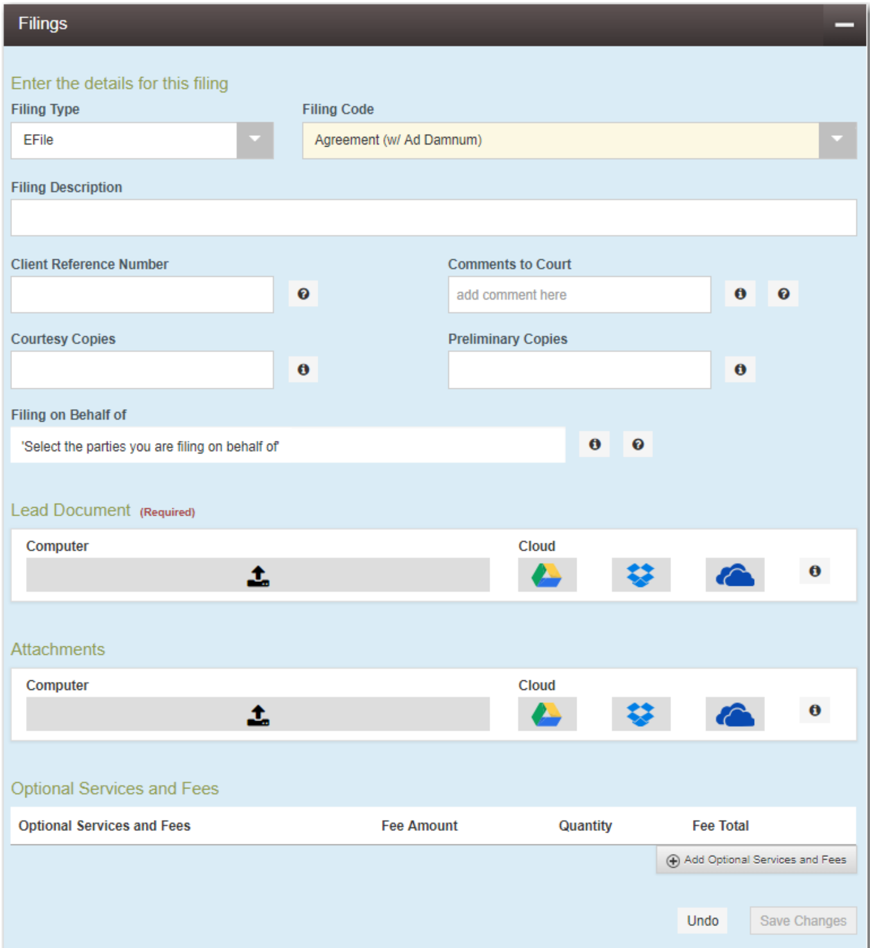


Figure 9.68 – Filings Section

a. Select a filing type from the **Filing Type** drop-down list.
b. Select the **Agreement (w/ Ad Damnum)** filing code from the **Filing Code** drop-down list.

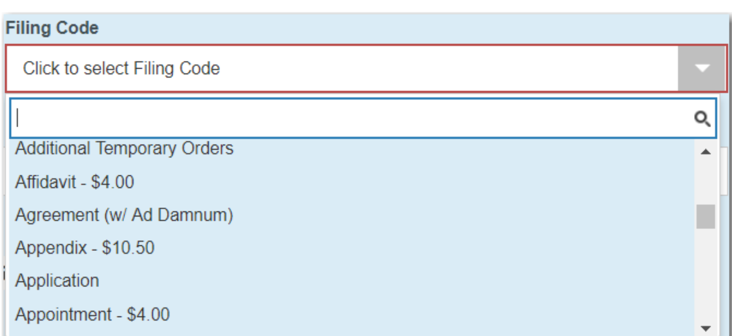


Figure 9.69 – The Filing Code Agreement (w/ Ad Damnum) Option in the Filing Code Drop-Down List

c. Type a description of the filing in the **Filing Description** field.
d. Type a client reference number in the **Client Reference Number** field.

Note: A client reference number is a client-created number for internal purposes only. Most courts do not see or refer to the Client Reference Number field for the filing. This is an optional field.

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. If you want to send preliminary copies of the filing to another party, type the recipient's email address in the **Preliminary Copies** field.

h. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

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

i. Click the **Lead Document** field to select a lead document to upload. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. You can upload only one document as a lead document.

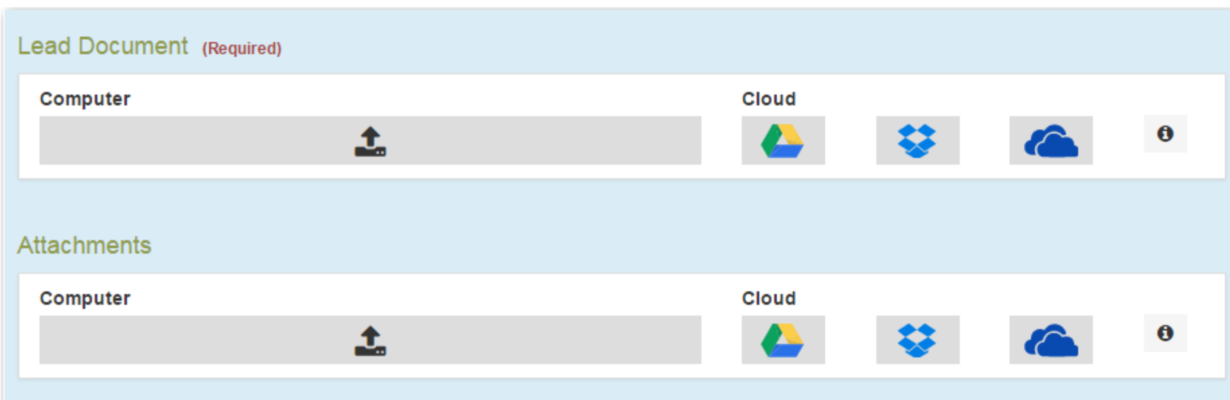


Figure 9.70 – Lead Document and Attachments Fields in the Filings Section

j. Type a name for the lead document in the **Description** field.

Note: A maximum length for the document name can be configured by Tyler at the client's request. When configured, if a user assigns a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

k. Select the level of security to attach to the document from the **Security** drop-down list.

l. If you have attachments to upload, click the **Attachments** field to select the documents to upload. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and then upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

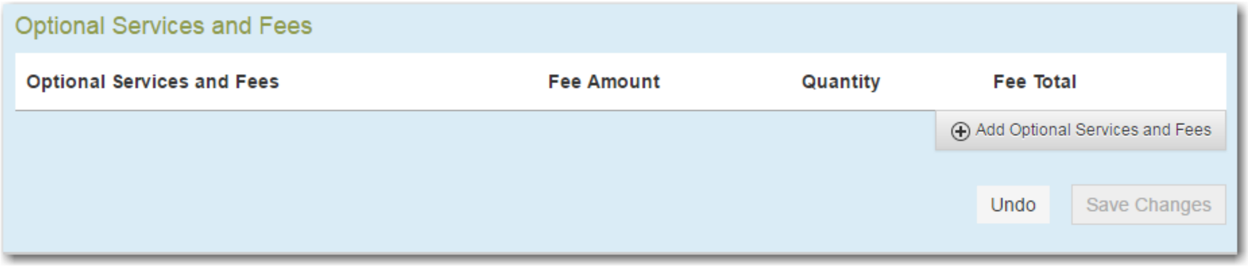
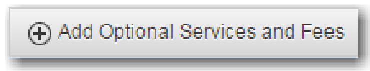


Figure 9.71 – Optional Services and Fees Section

m. If you want to add an optional service to the filing, click  .

The **Optional Services and Fees** field is displayed.

n. Select the optional service that you want from the **Optional Services and Fees** drop-down list.

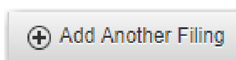
o. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove the specified optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

p. When you are done adding optional services, click  .

Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

q. If you want to add another filing to the case, click  .

The top of the **Filings** section is displayed, where you can begin another filing.

r. When you are done entering the filing details, click  .

5. After you have added all of the filings to the case and saved the changes, verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

6. Complete the fields in the **Fees** section:

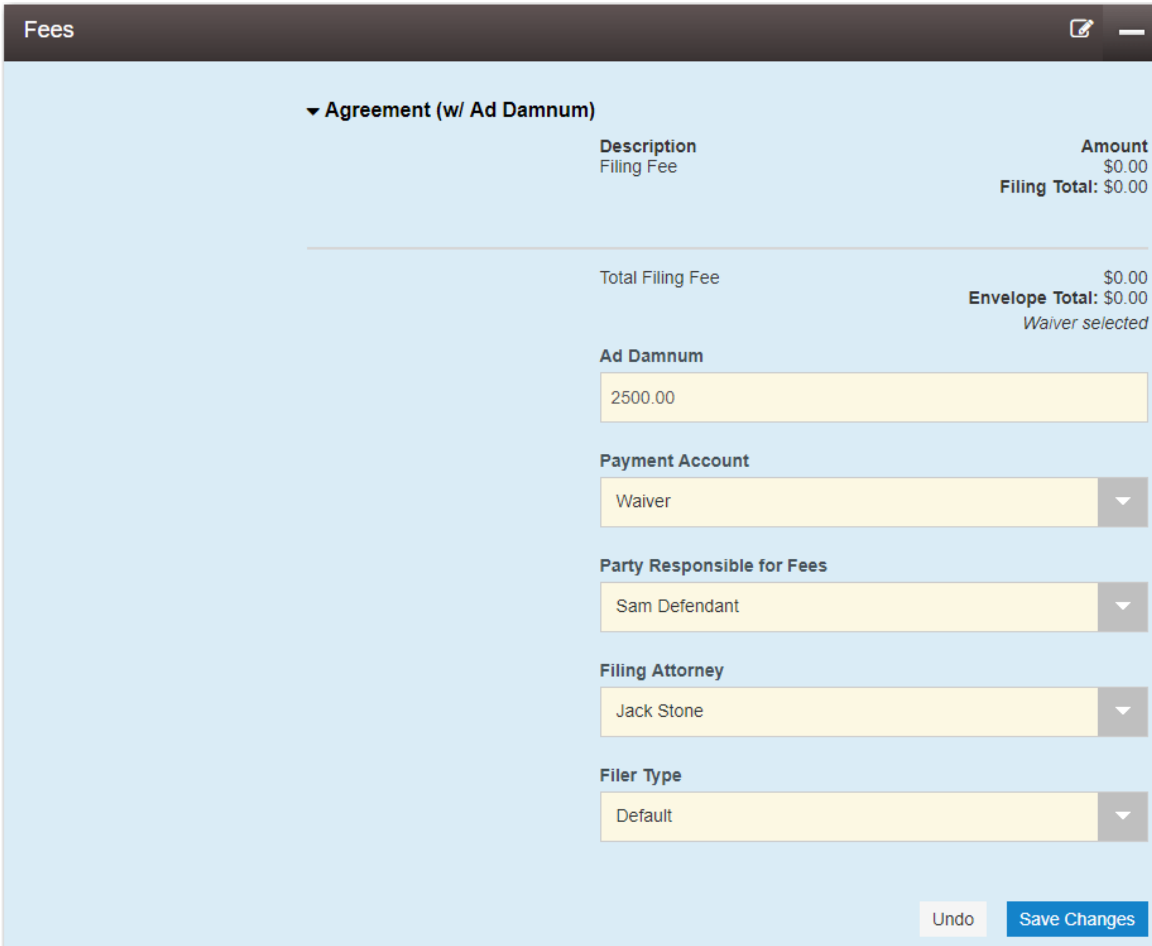


Figure 9.72 – Fees Section Example

a. Type the amount of damages for the case in the **Ad Damnum** field.

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

Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

c. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

d. Select the filing attorney from the **Filing Attorney** drop-down list.

Note: All users may not see the Filing Attorney field.

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

7. After completing the required fields, click Save Changes.

8. After completing the fields in all of the sections on the page, click Summary to review a summary of your filing.

9. When you are satisfied with the information in your filing, click 

.

   A new envelope of your filing is included on the *Filing History* page. In addition, the amount you entered in the **Ad Damnum** field is displayed in the envelope details in the **Fees** section.

Entering a Filing with a Motion Type Code

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

To enter a filing with a Motion Type code, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

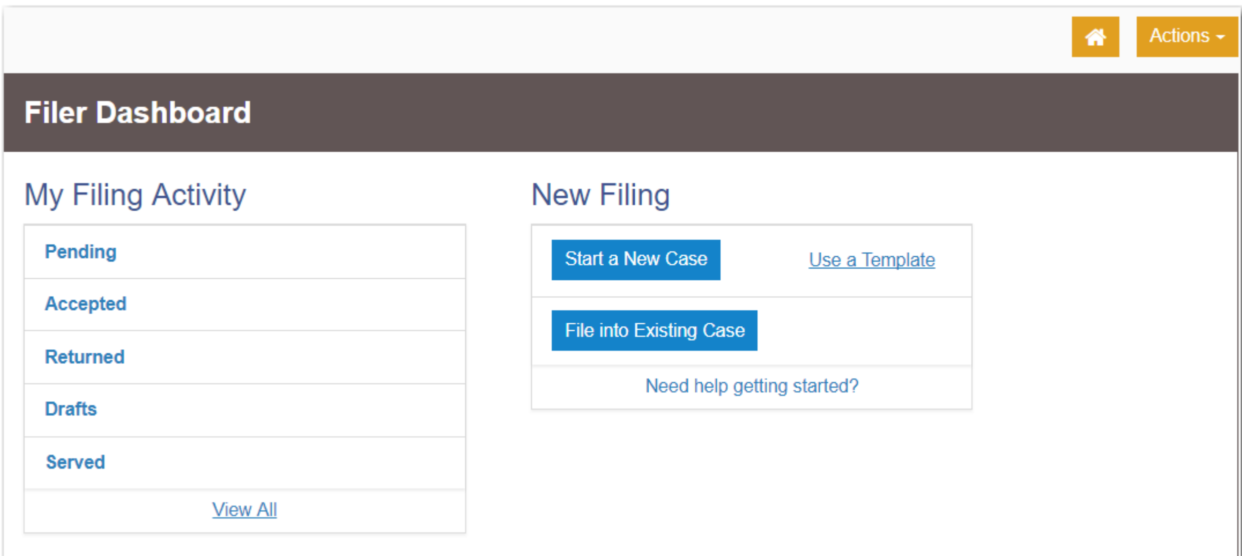


Figure 9.73 – Filer Dashboard Page

   The *Start a New Case* page is displayed.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section.
3. Complete the required fields in the **Party Information** section.
4. Enter the filing details for the case in the **Filings** section:

   a. Select a filing type from the **Filing Type** drop-down list.

   b. Select a Motion filing code from the **Filing Code** drop-down list.

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

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

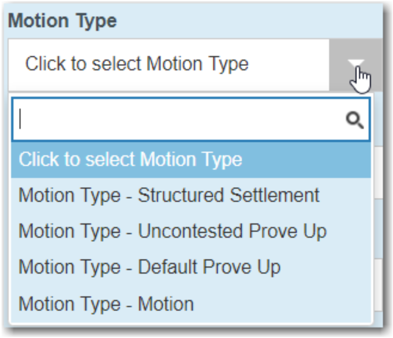


Figure 9.74 – Sample Motion Type Drop-Down List

c. Select the appropriate Motion Type from the drop-down list.
d. Type a description of the filing in the **Filing Description** field.
e. Type a client reference number in the **Client Reference Number** field.

   Note: A client reference number is a client-created number for internal purposes only. Most courts do not see or refer to the Client Reference Number field for the filing. This is an optional field.

f. Type any relevant comments in the **Comments to Court** field.
g. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.
h. If you want to send preliminary copies of the filing to another party, type the recipient's email address in the **Preliminary Copies** field.
i. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

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

   A calendar is displayed from which you can select the specified date.

j. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

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

k. Click the **Lead Document** field to select a lead document to upload. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

   Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

   Note: The Lead Document field is required. You can upload only one document as a lead document.

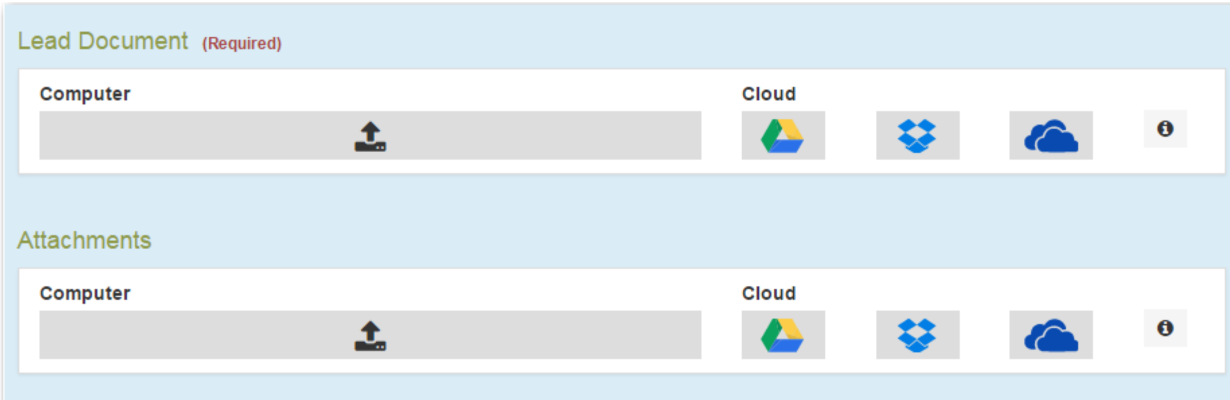


Figure 9.75 – Lead Document and Attachments Fields in the Filings Section

l. Type a name for the lead document in the **Description** field.

Note: Tyler can configure a maximum length for the document name at the client's request. When the maximum length is configured, if you assign a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

m. Select the level of security to attach to the document from the **Security** drop-down list.

n. If you have attachments to upload, click the **Attachments** field to select the documents to upload. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

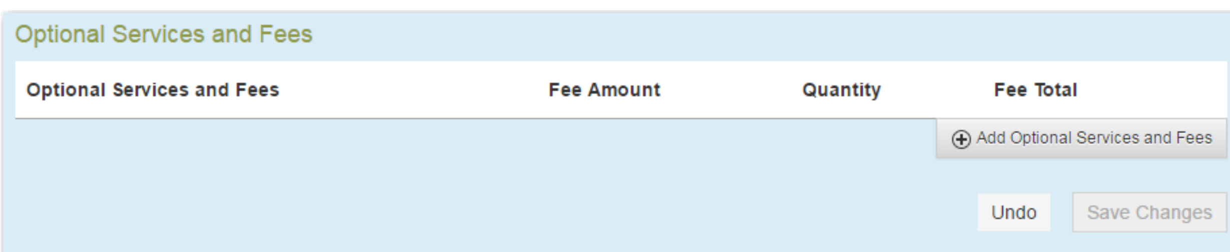
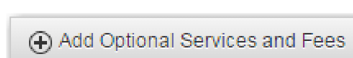


Figure 9.76 – Optional Services and Fees Section

o. If you want to add an optional service to the filing, click .

The **Optional Services and Fees** field is displayed.

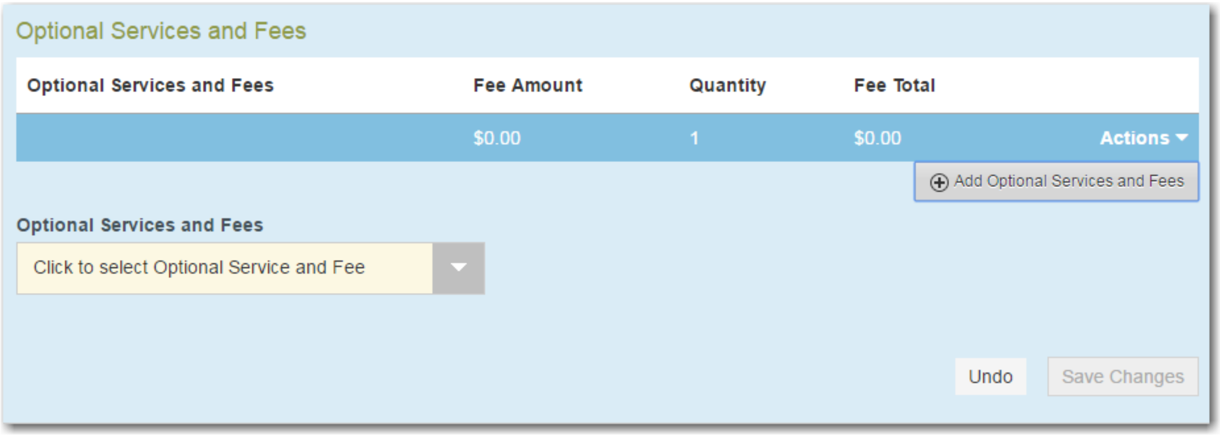


Figure 9.77 – Optional Services and Fees Field in the Optional Services and Fees Section

p. Select the appropriate option from the **Optional Services and Fees** drop-down list.

Figure 9.78 – Optional Services and Fees Drop-Down List

The **Enter amount to be paid** field is displayed.

Note: The wording displayed on your system may differ from the example provided.

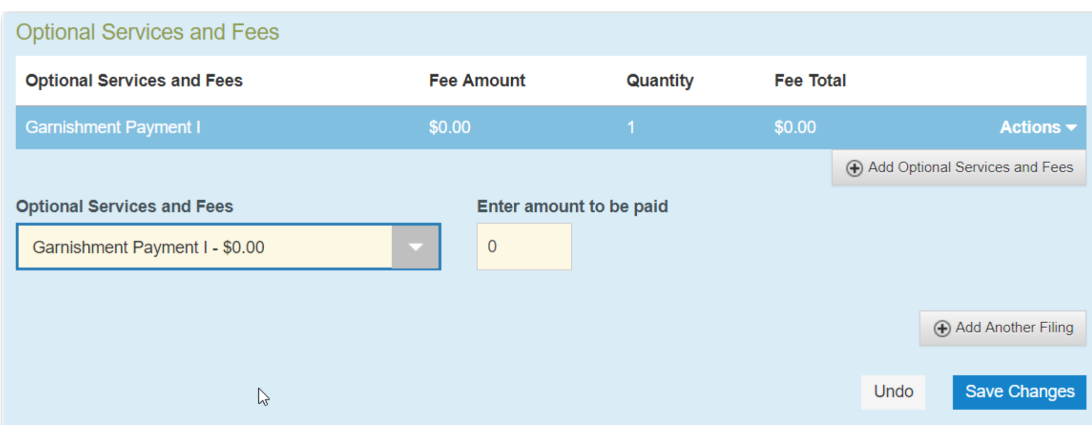


Figure 9.79 – Example of an Optional Services and Fees Section with the Enter Amount to Be Paid Field Displayed

q. Enter the fee for the optional service in the **Enter amount to be paid** field.

r. Click **Save Changes**.

The fee that you entered is displayed in the **Fee Total** column.

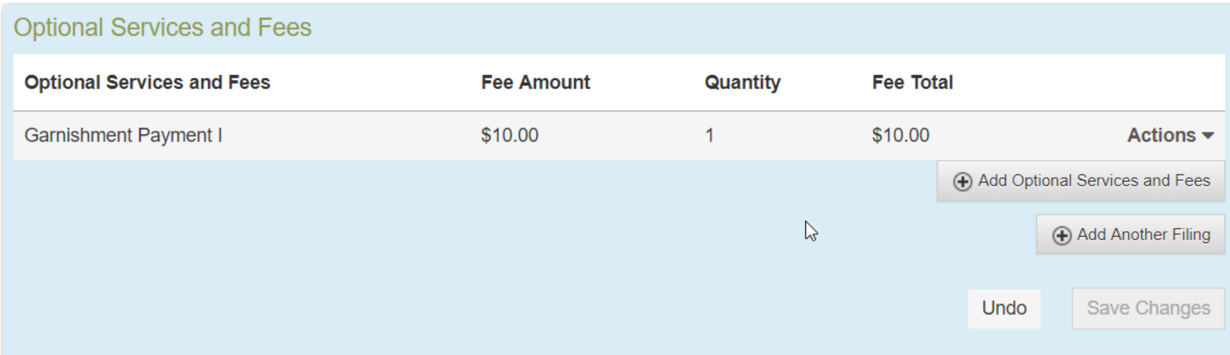


Figure 9.80 – Optional Services and Fees Section with the Fee Amount Displayed

s. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

t. When you are done adding optional services, click **Save Changes**.

Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

u. If you want to add another filing to the case, click **Add Another Filing**.

The top of the **Filings** section is displayed, where you can begin another filing.

v. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.

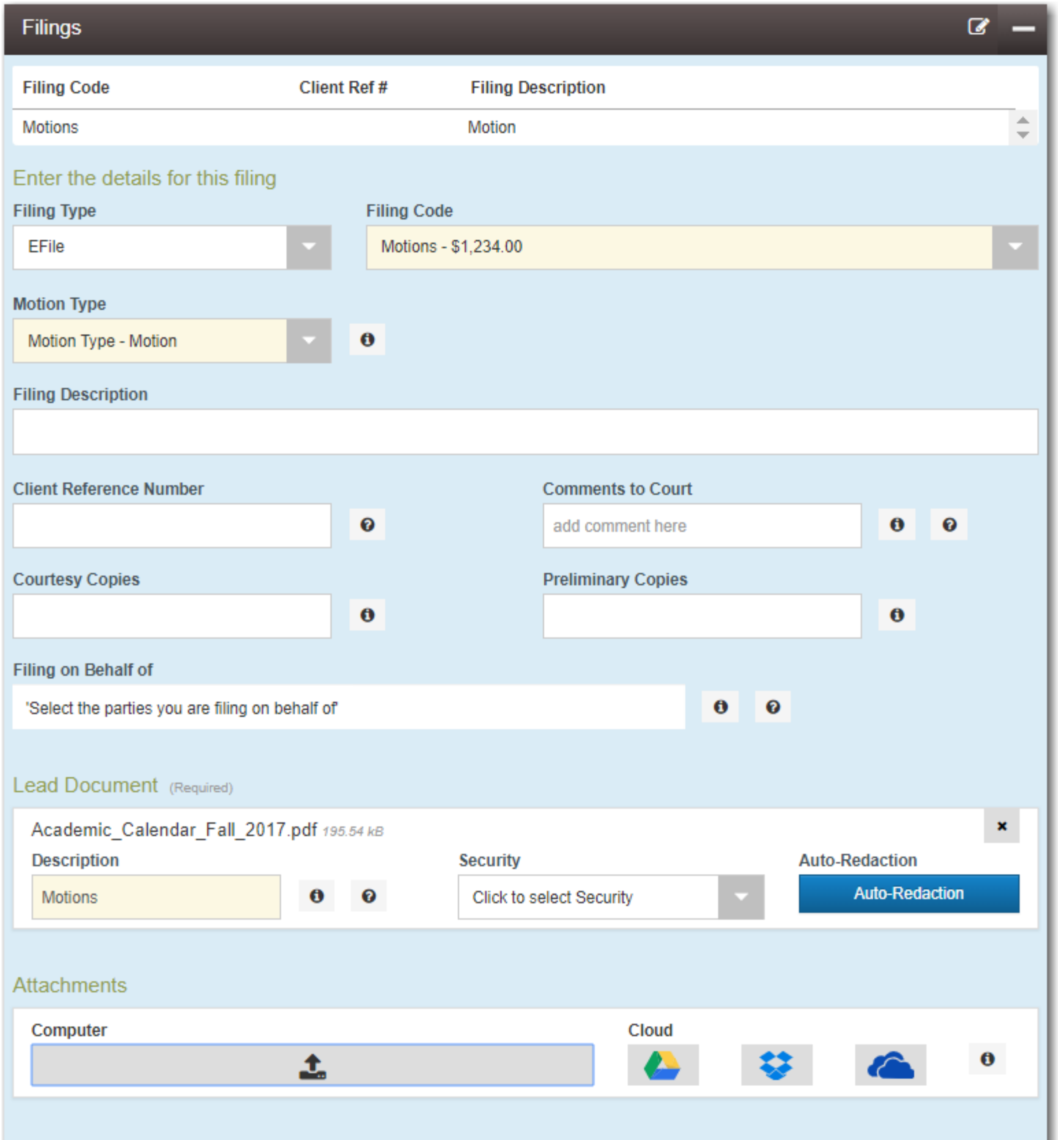


Figure 9.81 – Example of a Filings Section with a Motion Filing Code and Motion Type Selected

Setting the Maximum Fee Amount for a Filing

Filers can specify the maximum amount that fees associated with a filing should not exceed. Filers enter the amount in the **Fees Not To Exceed** field in the **Fees** section of a filing. If, during the court review process, the Reviewer changes the filing so that the fees exceed the filer-specified maximum amount, the Reviewer will be notified, and the change will not be accepted.

Note: The Fees Not To Exceed field is configured by Tyler and may not be available on your system.

To set the maximum fee amount for a filing, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

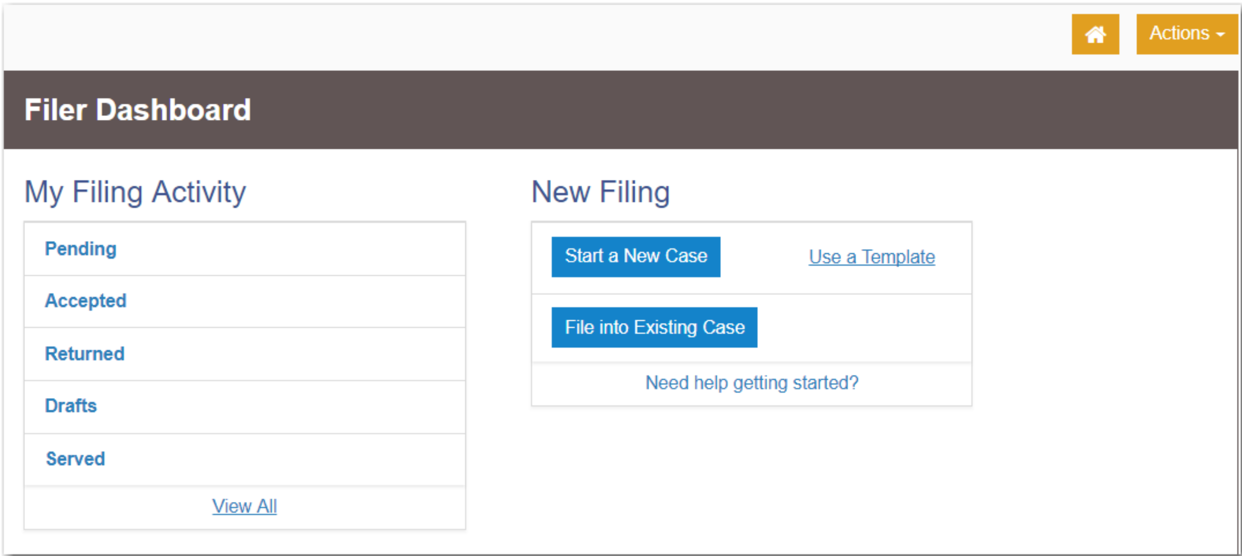


Figure 9.82 – Filer Dashboard Page

The *Start a New Case* page is displayed.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section.
3. After completing the required fields, click Save Changes.
4. Complete the required fields in the **Party Information** section.
5. After completing the fields for all parties, click Save Changes.
6. Enter the filing details for the case in the **Filings** section.
7. After you have added all of the filings to the case and saved the changes, verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.
8. Click Save Changes to save your changes, or click Undo to cancel the action.
9. Complete the required fields in the **Fees** section:

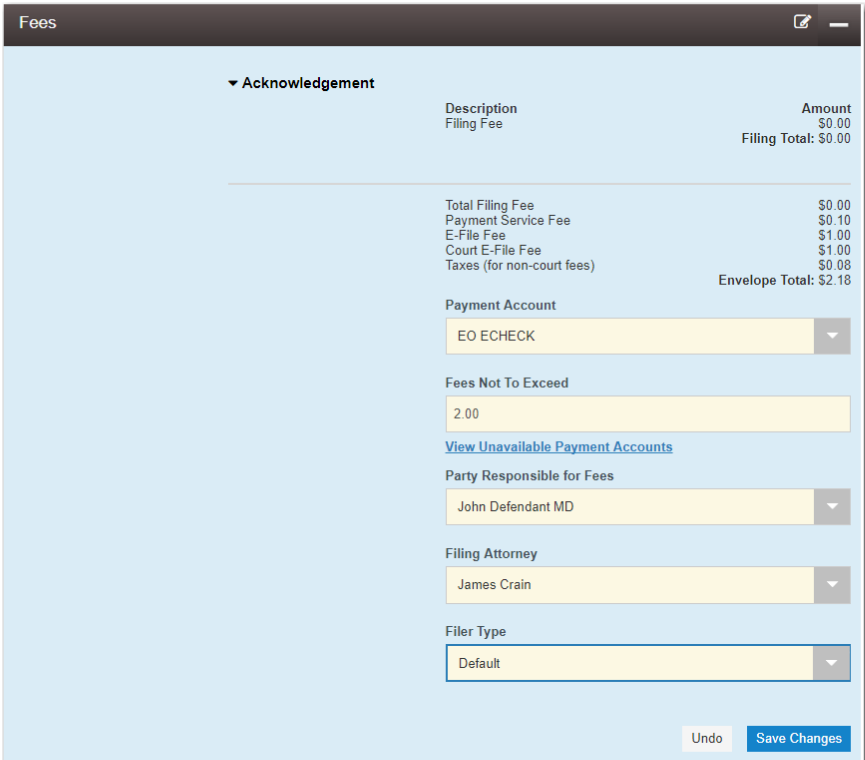


Figure 9.83 – Sample Fees Section

a. From the **Payment Account** drop-down list, select a payment account to pay the filing fee.

b. Type an amount in the **Fees Not To Exceed** field.

   Note: The amount that you enter in this field is a filer-specified amount. If the filing fees exceed this amount, the user will receive an error message and will not be allowed to continue with the filing until the error is corrected.

c. Select the party responsible for the filing fees from the **Party Responsible for Fees** drop-down list.

d. Select a filing attorney from the **Filing Attorney** drop-down list.

e. Select a filer type for the payment account used to pay the filing fees from the **Filer Type** drop-down list.

10. After completing the required fields for the filing, click 

to save your changes, or click 

to cancel the action.

Court Fees for Additional Case Parties

The system supports the ability to configure court fees that are to be applied to a party type.

Note: The ability to collect court fees is configured by Tyler and may not be available on your system.

When a specific combination of node, case type, and party type matches the configured rule, a court fee is assessed for additional parties that are added to a case. The configuration is client-specific. For example, a fee may not be assessed for the first defendant, but a fee may be charged for each additional defendant.

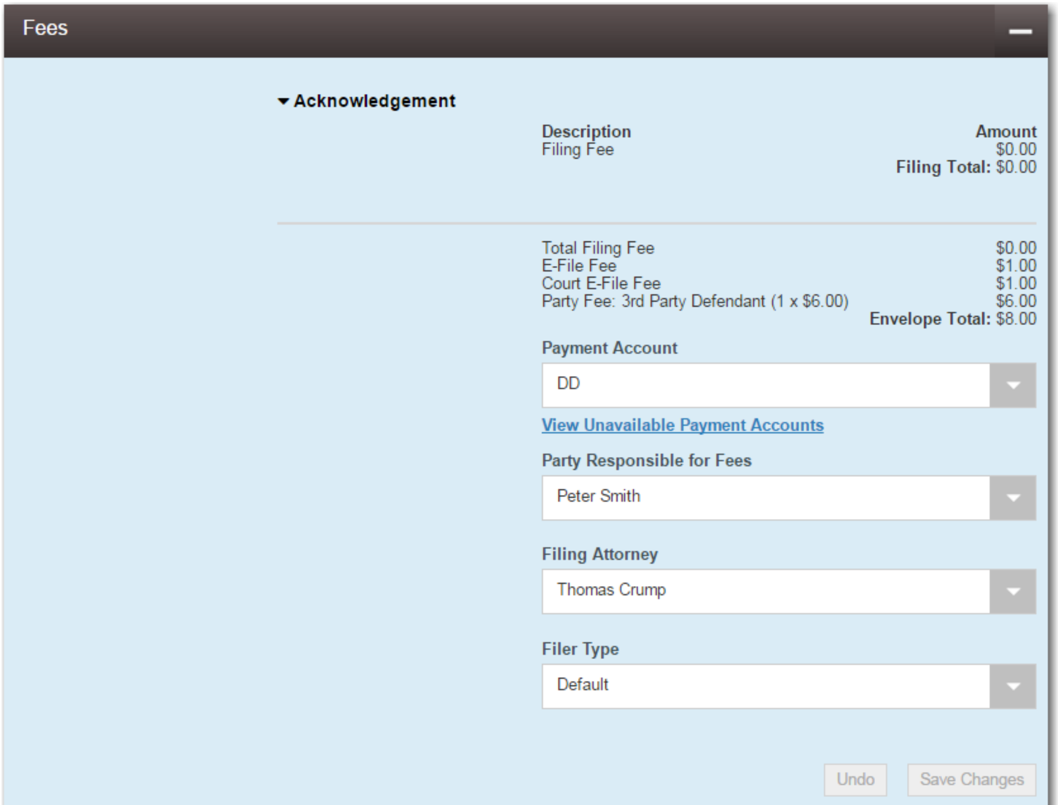


Figure 9.84 – Fees Section with Party Fees Displayed

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, a dialog box is displayed in which you must select a check box before continuing with your filing.

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

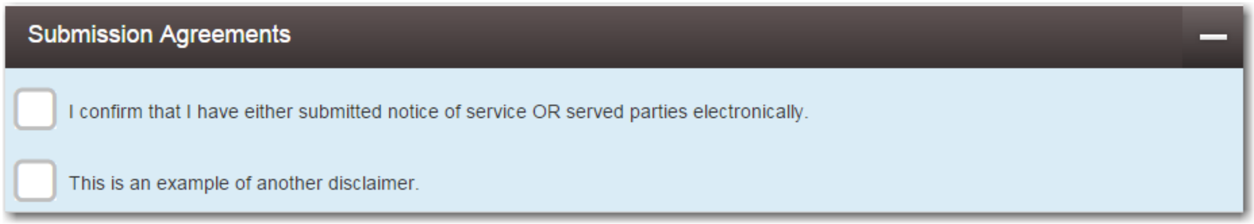


Figure 9.85 – Submission Agreements Dialog Box

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 date and time that the filing was submitted are also displayed. The time stamp corresponds to the time zone in which the filing occurred.

The party, filings, and fees information must be complete before you can view the envelope summary. A payment account must be assigned to the case to complete the filing process.

To view the envelope summary, perform the following steps:

1. Complete the required information in the **Case Information**, **Party Information**, **Filings**, and **Fees** sections.
2. After you have completed the fields in each section, click 

.

   The *Envelope Summary* page is displayed.

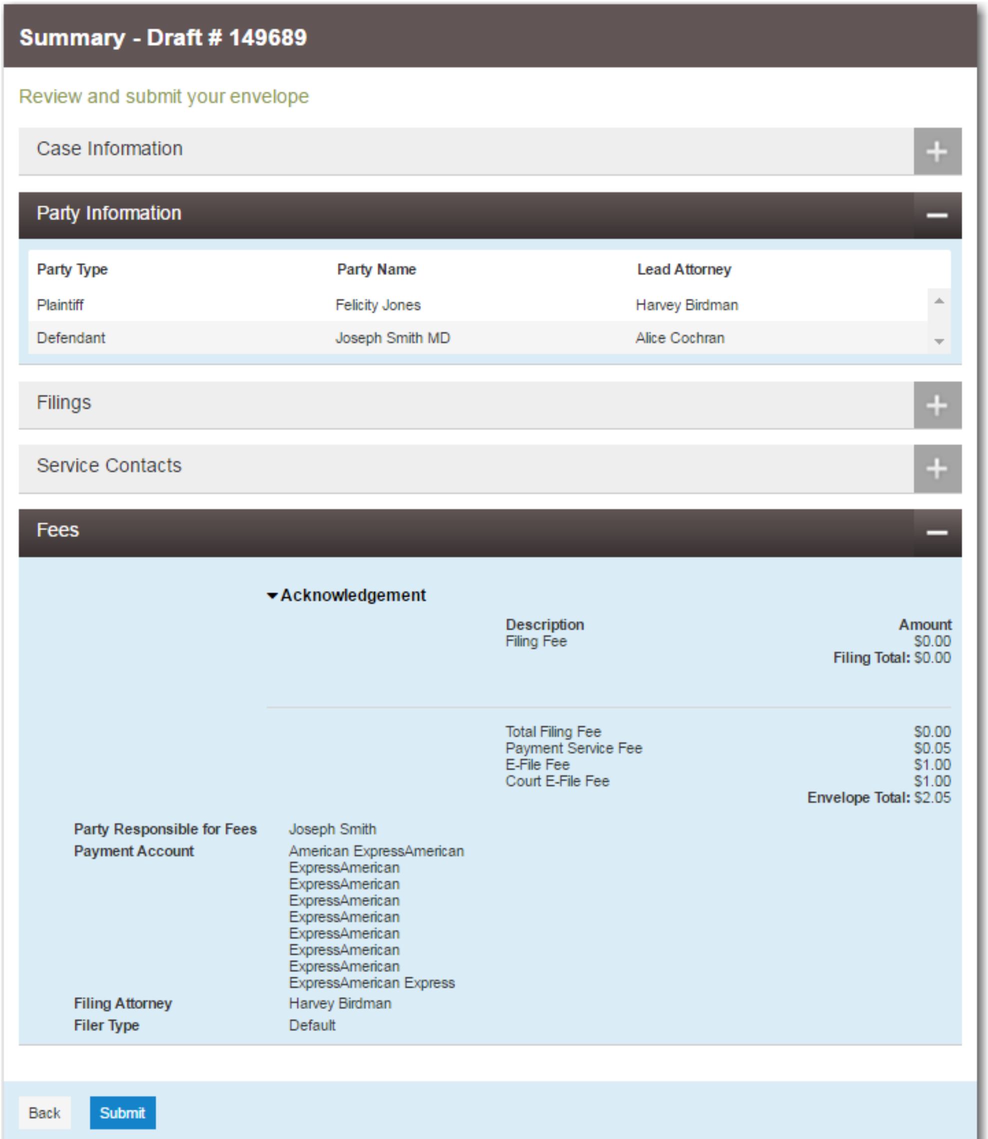
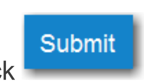


Figure 9.86 – Envelope Summary Page

3. Review the page. After you are satisfied with the information in your filing, click 

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10 Redaction Feature

Topics covered in this chapter

In Release 2018.0 and later, the Odyssey File & Serve system supports the Redaction feature. Filers can redact a document, view the redacted document, and then make modifications, if necessary, before uploading the redacted document to the case management system.

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

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

The following data is automatically redacted:

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

Entering a Filing with Redacted Documents

You can enter a filing in which you upload a redacted lead document and redacted attachments if applicable.

Note: Waivers are not permitted when using the Redaction feature.

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

To enter a filing with redacted documents, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

The *Start a New Case* page is displayed.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section.
3. After completing all required fields in the **Case Information** section, click Save Changes.
4. Enter the required information in the **Party Information** section, and then click Save Changes.
5. Enter the filing details for the case in the **Filings** section:

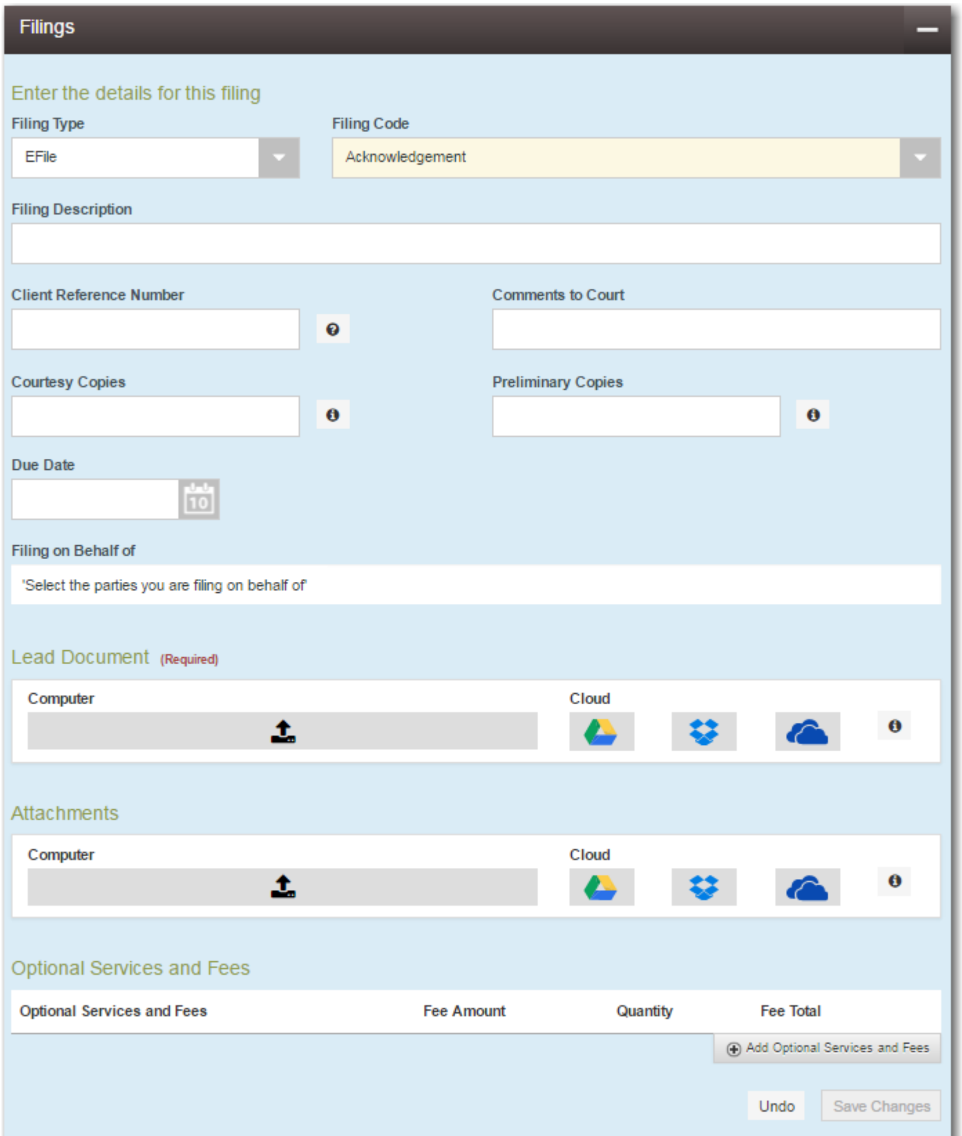


Figure 10.1 – Filings Section

   a. Select a filing type from the **Filing Type** drop-down list.
   b. Select a filing code from the **Filing Code** drop-down list.

   A message is displayed, informing you that a waiver cannot be used when performing a redaction.

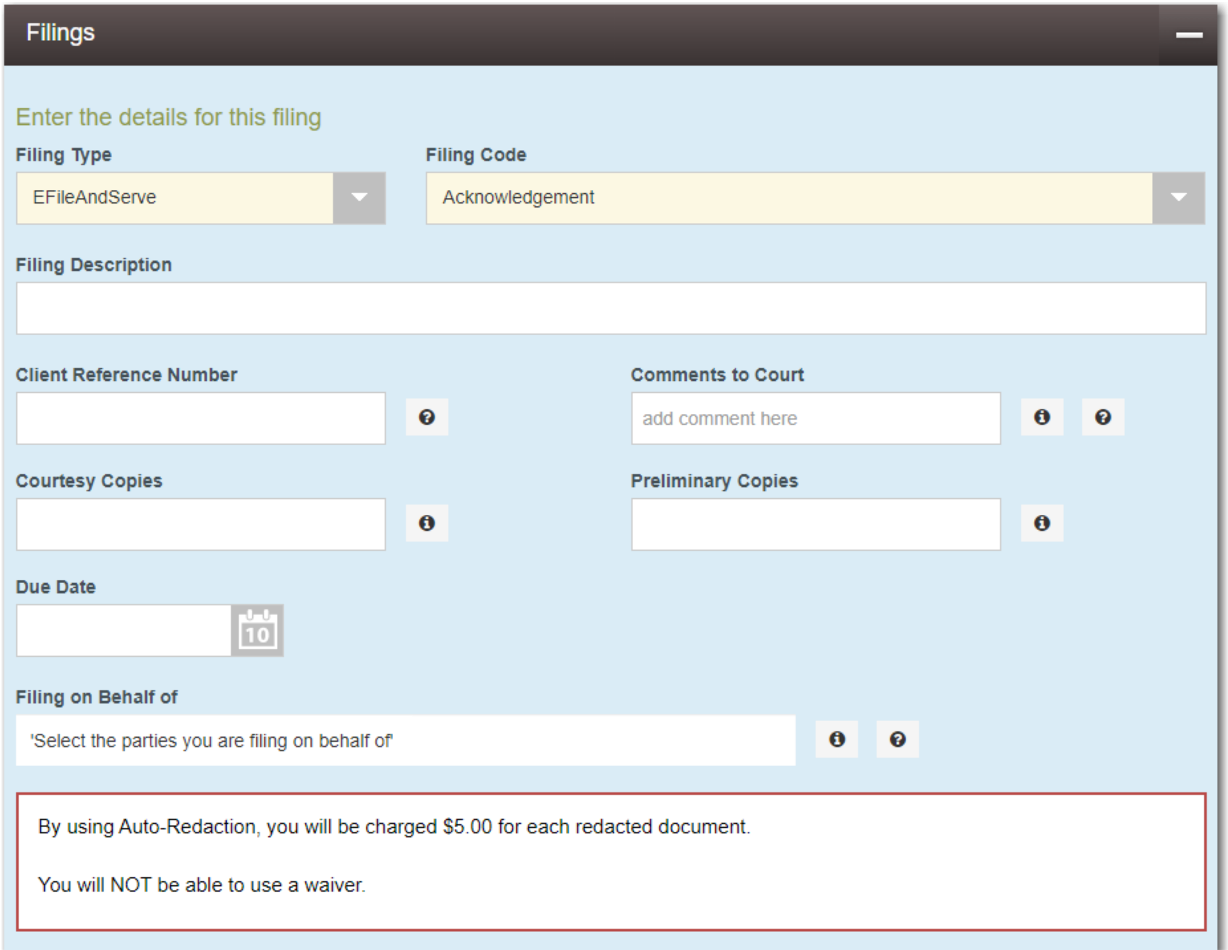


Figure 10.2 – Message in the Filings Section

c. Type a description of the filing in the **Filing Description** field.

d. Type a client reference number in the **Client Reference Number** field.

Note: A client reference number is a client-created number for internal purposes only. Most courts do not see or refer to the Client Reference Number field for the filing. This is an optional field.

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. If you want to send preliminary copies of the filing to another party, type the recipient's email address in the **Preliminary Copies** field.

h. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

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

A calendar is displayed from which you can select the specified date.

i. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

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

j. Click the **Lead Document** field to select a lead document to upload. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. You can upload only one document as a lead document. Only the following file types are supported: PDF and TIFF.

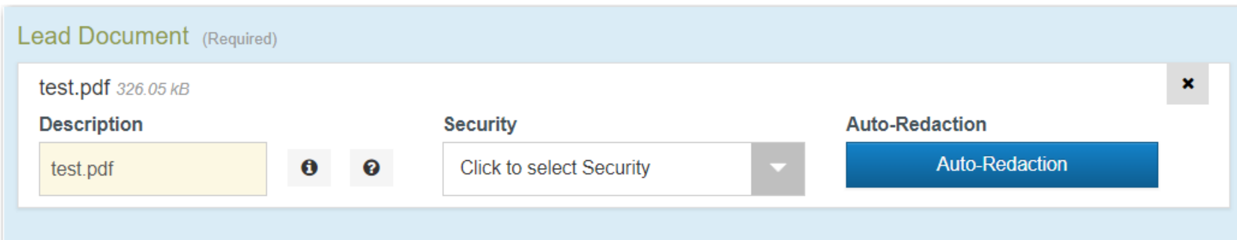


Figure 10.3 – Lead Document Field in the Filings Section

k. Type a name for the lead document in the **Description** field.

Note: Tyler can configure a maximum length for the document name at the client's request. When the maximum length is configured, if you assign a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

l. Select the level of security to attach to the document from the **Security** drop-down list.

m. If you want to have the document automatically redacted, click Auto-Redaction.

Note: You can upload multiple documents to be redacted. Click Auto-Redaction **after each document.**

n. Wait while the system performs the redactions.

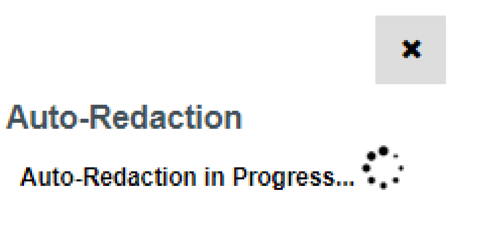


Figure 10.4 – Auto-Redaction in Progress Verification

The *Auto-Redaction in Progress* dialog box is displayed.

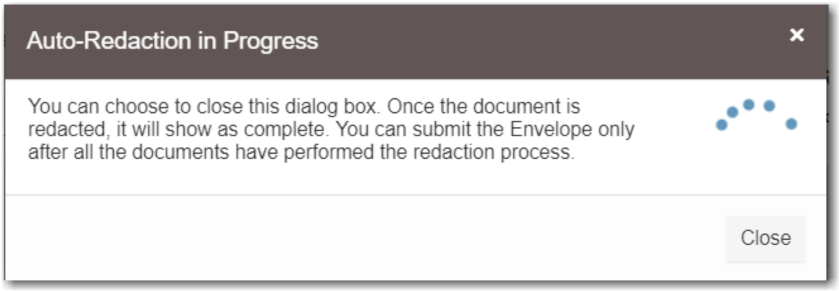


Figure 10.5 – Auto-Redaction in Progress Dialog Box

You can close the dialog box while you wait. When the auto-redaction is complete, the system displays the number of redactions that were found in the document.

o. If you want to view the redacted areas, click 

.

The redacted document is displayed in the Redaction Editor (*Tyler Content Manager* window) in a new tab in your browser.

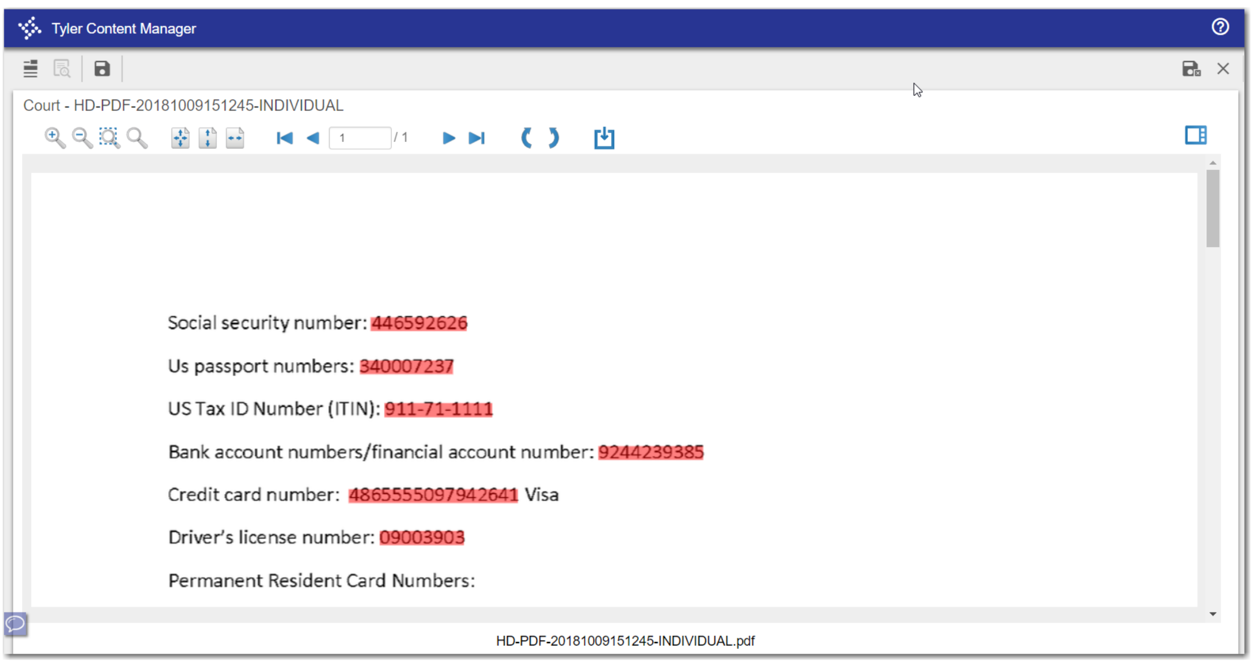


Figure 10.6 – Redaction Editor (Tyler Content Manager Window)

p. In the Redaction Editor (*Tyler Content Manager* window), perform manual redactions as necessary.

Click , and then highlight the area of the document that you want to redact. Continue to redact the desired sections of the document.

Note: Another way that you can apply a redaction on a text-based, non-scanned PDF document is to highlight the word directly on the image (click and drag), and then right-click to select Redact from the drop-down list.

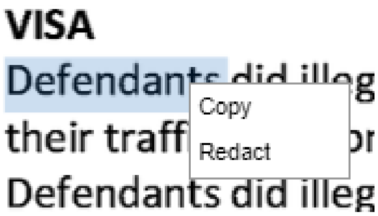


Figure 10.7 – Redaction Options Drop-Down List

Note: If you want to delete a redaction, right-click the specified redaction.

q. When you are done performing the redactions, click .

r. Close the Redaction Editor (*Tyler Content Manager* window).

Note: Tyler recommends that you click the Close Viewer icon () or the Save and Close Viewer icon () to close the view rather than clicking the browser's Close button.

s. If you have attachments to upload, click the **Attachments** field to select the documents to upload. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and then upload the document in the Lead Document field.

t. If you want to redact the attachment, click 

. Perform the same redaction steps for the attachment as you performed for the lead document.

The **Optional Services and Fees** section is displayed.

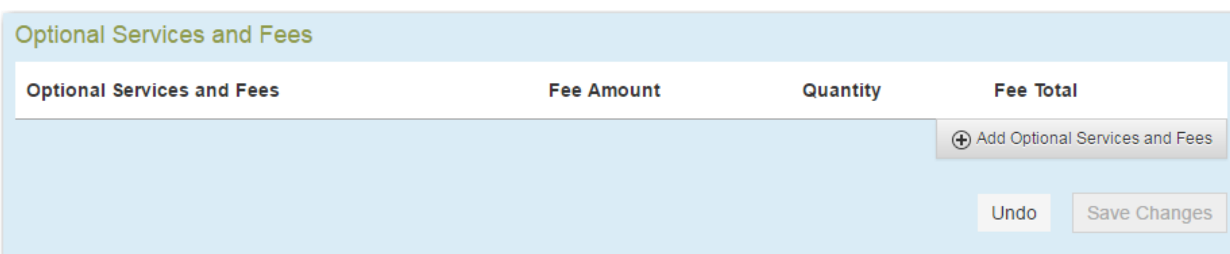
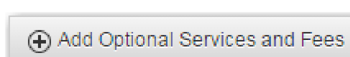


Figure 10.8 – Optional Services and Fees Section

u. If you want to add an optional service to the filing, click 

.

The **Optional Services and Fees** field is displayed.

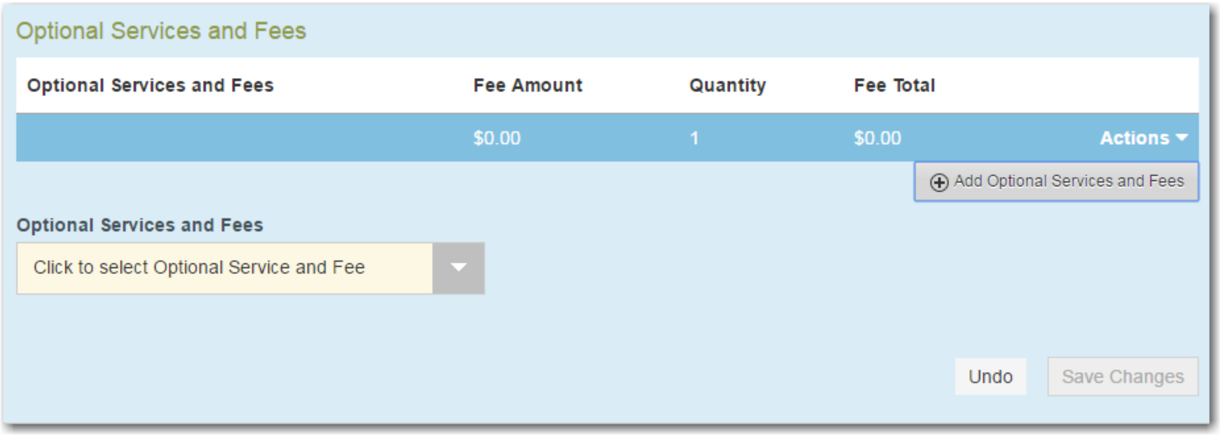


Figure 10.9 – Optional Services and Fees Field in the Optional Services and Fees Section

v. Select the appropriate option from the **Optional Services and Fees** drop-down list.

Figure 10.10 – Optional Services and Fees Drop-Down List

The **Enter amount to be paid** field is displayed.

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

Note: The wording displayed on your system may differ from the example provided.

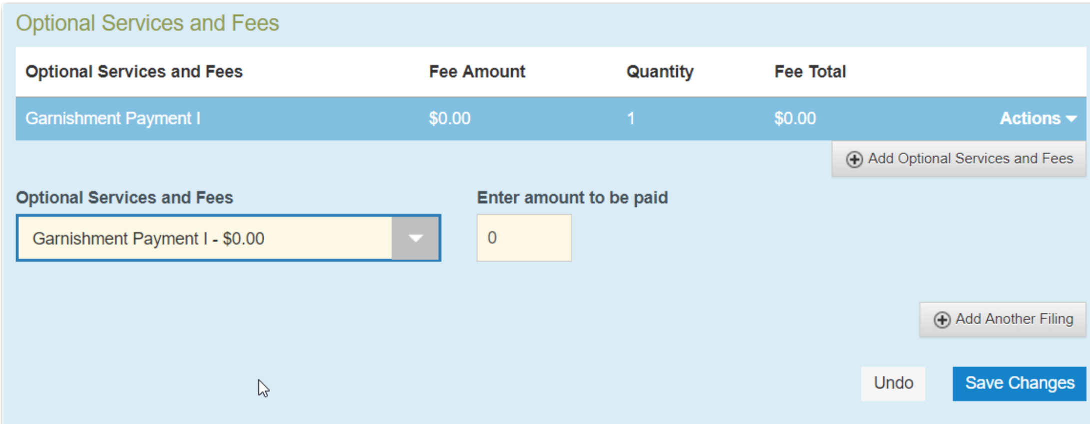


Figure 10.11 – Example of an Optional Services and Fees Section with the Enter Amount to Be Paid Field Displayed

w. Enter the fee for the optional service in the **Enter amount to be paid** field.

x. Click Save Changes.

The fee that you entered is displayed in the **Fee Total** column.

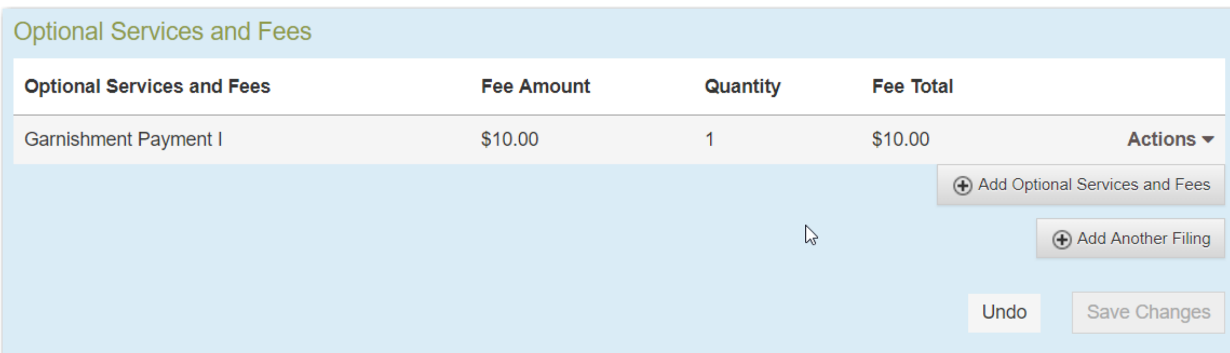


Figure 10.12 – Optional Services and Fees Section with the Fee Amount Displayed

y. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

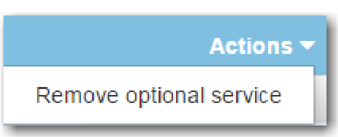


Figure 10.13 – Optional Service Actions Drop-Down List

z. When you are done adding optional services, click Save Changes.

Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

aa. If you want to add another filing to the case, click 

.

The top of the **Filings** section is displayed, where you can begin another filing.

ab. Click 

to save your changes, or click 

to cancel the action.

6. After you have added all of the filings to the case and saved the changes, verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.
7. Complete the required fields in the **Fees** section.

Note: The redaction fee is listed with the other filing fees.

Note: The wording displayed on your system may differ from the example provided.

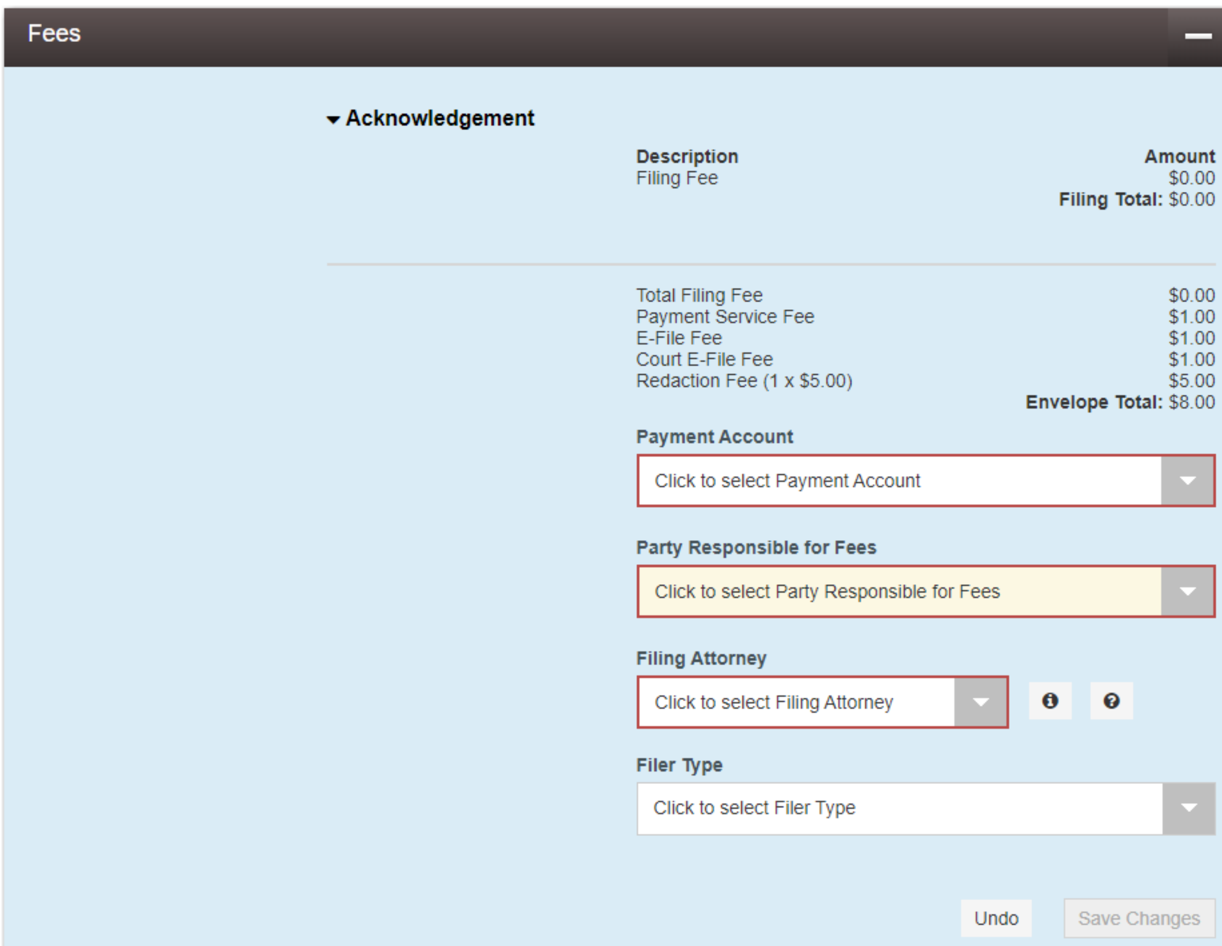


Figure 10.14 – Fees Section

8. Click 

.

9. Click 

to review a summary of your filing.

10. When you are satisfied with the information in your filing, click 

.

Deleting a Redaction

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

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

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

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

1. Right-click the specified redaction.

   The *Annotation Notes* dialog box is displayed.

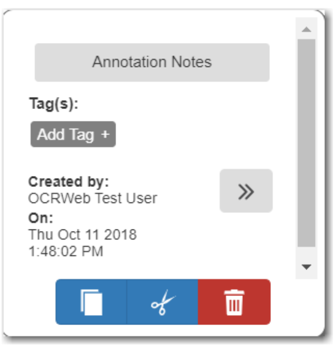
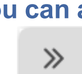


Figure 10.15 – Annotation Notes Dialog Box

   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.

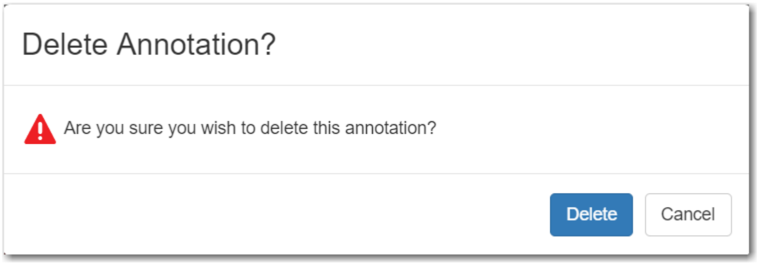
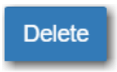


Figure 10.16 – Delete Annotation Dialog Box

3. Click  to delete the specified redaction.

Working with an Existing Redaction

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

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

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

To work with an existing redaction, perform the following steps:

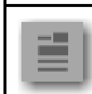
1. Turn off the manual redaction capability by clicking .
2. Locate the existing redaction that you want to resize or move, and then click the block of text.
3. Resize the redaction, or move the redaction to another location in the document.
4. When you are done, click  to save your changes, or click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

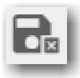
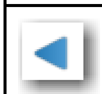
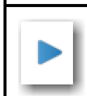
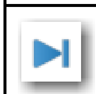
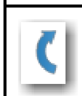
Redaction Editor Toolbar

You can use icons to navigate in the Redaction Editor (which is displayed as the *Tyler Content Manager* window).

Note: The icons that are visible in the Redaction Editor (*Tyler Content Manager* window) may differ slightly from the screen shots contained in this document.

The following table describes the icons in the Redaction Editor (*Tyler Content Manager* window).

Icon	Description
	Click this icon to begin performing a redaction.
	Click this icon to stop performing a redaction.

Icon	Description
	Click this icon to save the document.
	Click this icon to save and close the document.
	Click this icon to close the *Tyler Content Manager* (TCM) viewer.
	Click this icon to zoom in to a particular place in the document.
	Click this icon to zoom out.
	Click this icon to rubberband (that is, draw a border around) an area of the document in which you want to zoom.
	Click this icon to magnify an area of the document.
	Click this icon to fit the document to the window.
	Click this icon to fit the document to the height of the window.
	Click this icon to fit the document to the width of the window.
	Click this icon to view the first page of the document.
	Click this icon to view the previous page of the document.
	Use this window to view the current page of the document and the length of the document.
	Click this icon to view the next page of the document.
	Click this icon to view the last page of the document.
	Click this icon to rotate the document to the right.

Icon	Description
	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. The thumbnail pane is displayed. **Note: Click the icon again to close the thumbnail pane.**

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

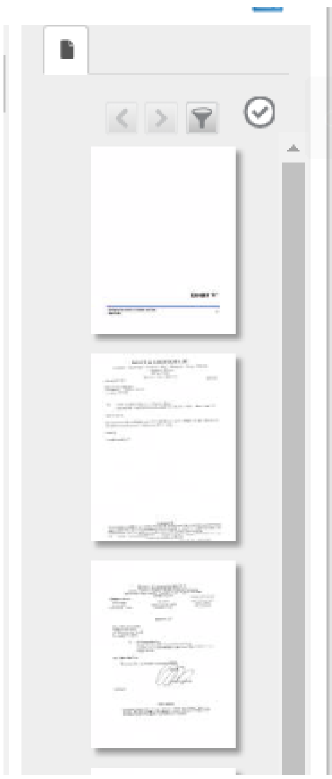
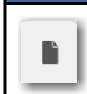
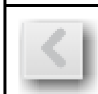


Figure 10.17 – Example of a Thumbnail Pane

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.

Icon	Description
	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.

Redaction Errors

Occasionally, a document may fail to be redacted automatically. If this situation occurs, you can still redact the specified document manually.

If a document fails to be redacted during the automatic redaction process, an error icon is displayed to the right of the **Auto-Redaction** field.

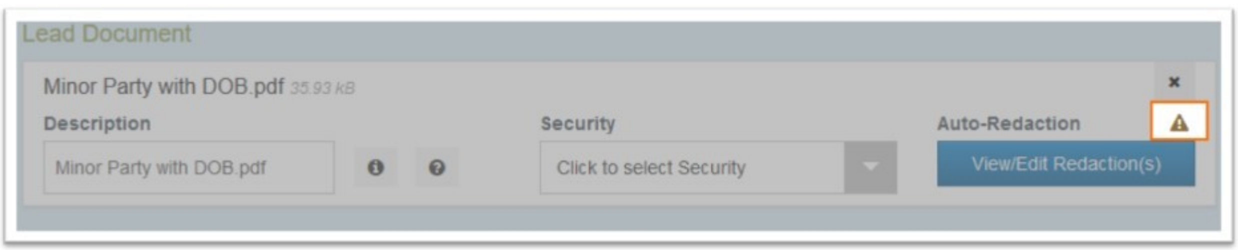


Figure 10.18 – Error Icon Displayed in the Auto-Redaction Section

Pause on the Error icon to view a tooltip.

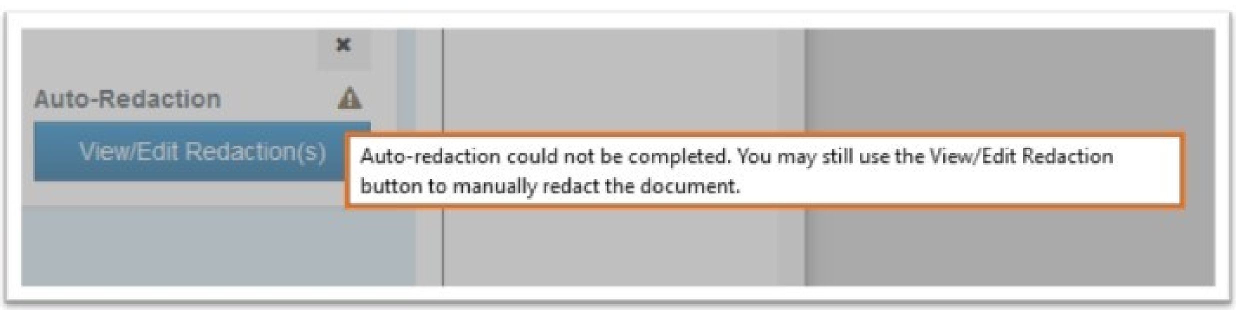


Figure 10.19 – Tooltip Displayed in the Auto-Redaction Section

11 File into an Existing Case

Topics covered in this chapter

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

Note: Some cases are restricted by source type. If you attempt to file into a restricted case, an error message will be displayed, and you will not be able to access that case.

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

- On the *Filing History* page, locate the case that you want to file into. From the **Actions** drop-down list for the specified case, select **File Into Case**.
- On the *Bookmarks* page, locate the case that you want to file into. From the **Actions** drop-down list for the specified case, select **File Into Case**.
- On the *Filer Dashboard* page, click **File into Existing Case**.
- On the *Filer Dashboard* page, from the **Actions** drop-down list, select **File Into Existing Case**.

Filing into an Existing Case from the Filing History Page

To file into an existing case from the *Filing History* page, perform the following steps:

1. On the *Filer Dashboard* page, from the **Actions** drop-down list, click **Filing History**.

   The *Filing History* page is displayed.

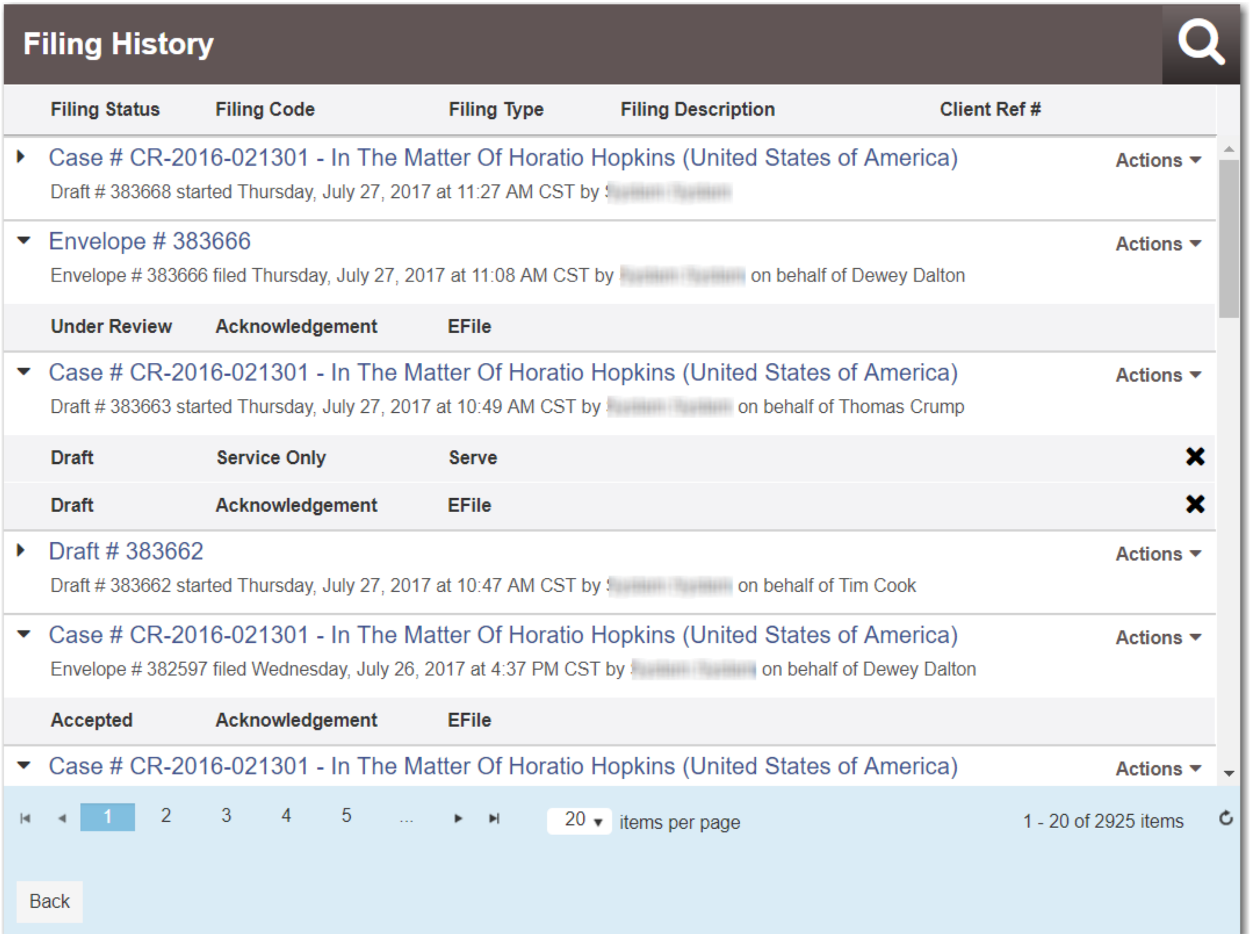


Figure 11.1 – Filing History Page

2. Locate the case that you want to file into.
3. From the **Actions** drop-down list for the specified case, select **File Into Case**.

Figure 11.2 – Actions Drop-Down List

The **Case Information** fields are already populated since this is an existing case.

The **Case Cross Reference Number** section is displayed after the **Case Information** section.

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

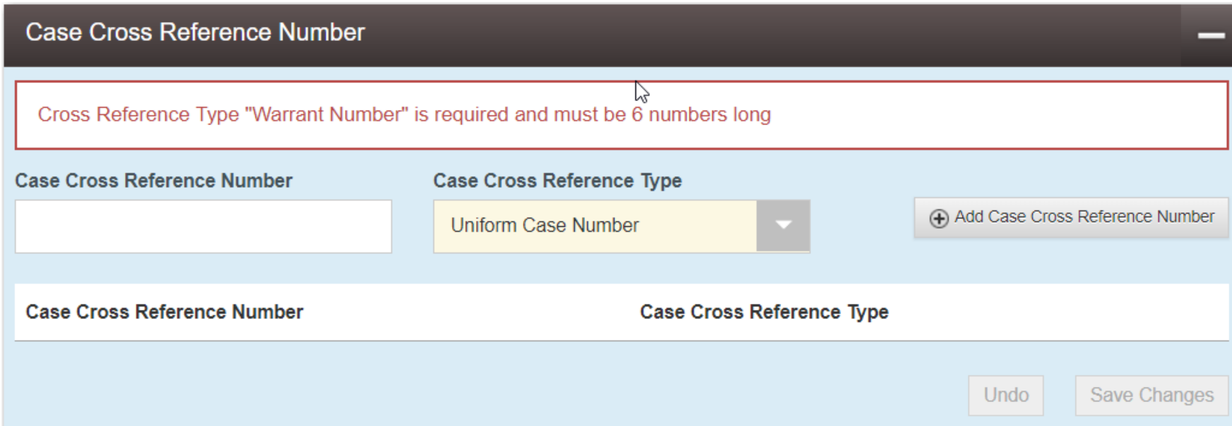


Figure 11.3 – Case Cross Reference Number Section

4. Type the case cross reference number in the **Case Cross Reference Number** field.

   Note: The case cross reference number must be six numbers long.

5. Select the case cross reference type from the **Case Cross Reference Type** drop-down list.

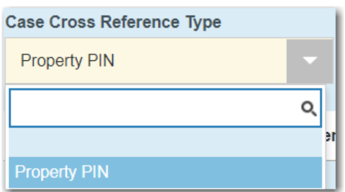
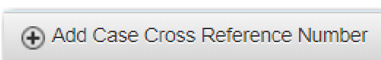


Figure 11.4 – Case Cross Reference Type Drop-Down List

6. Click .

   The case cross reference number and case cross reference type that you added are displayed.

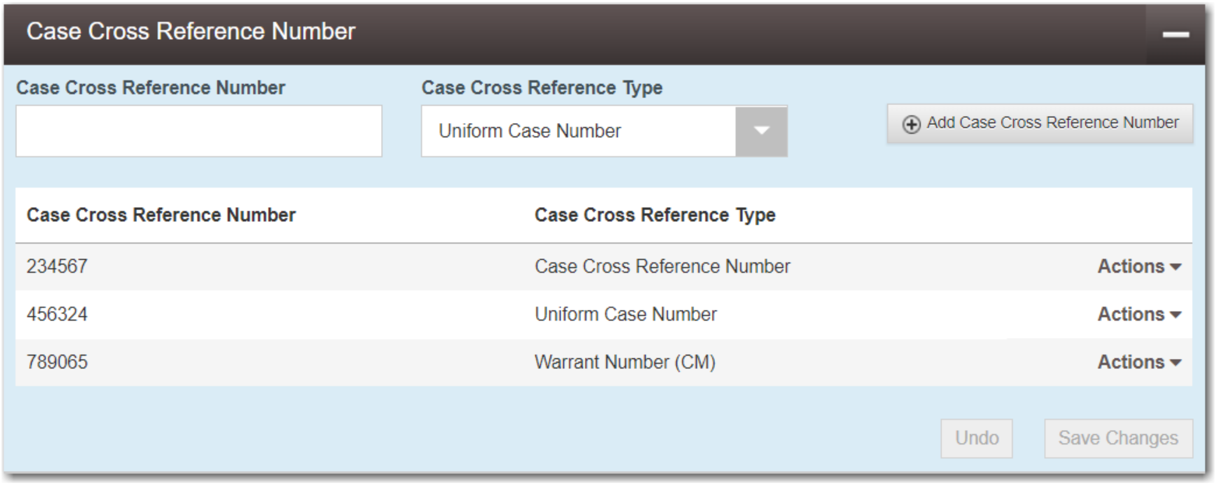


Figure 11.5 – Sample Case Cross Reference Number Section

7. If you want to add another case cross reference to the filing, repeat steps 4 through 6. Continue adding case cross references until you are done.
8. If you want to remove a case cross reference that you previously entered, select **Remove** from the **Actions** drop-down list.

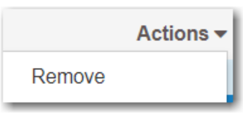
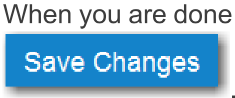


Figure 11.6 – Case Cross Reference Number Actions Drop-Down List

9. When you are done adding all of the case cross reference numbers to the filing, click 

.

   The **Party Information** fields are already populated since this is an existing case. You can immediately view the parties associated with the case.
10. Complete the filing details in the **Filings** section.

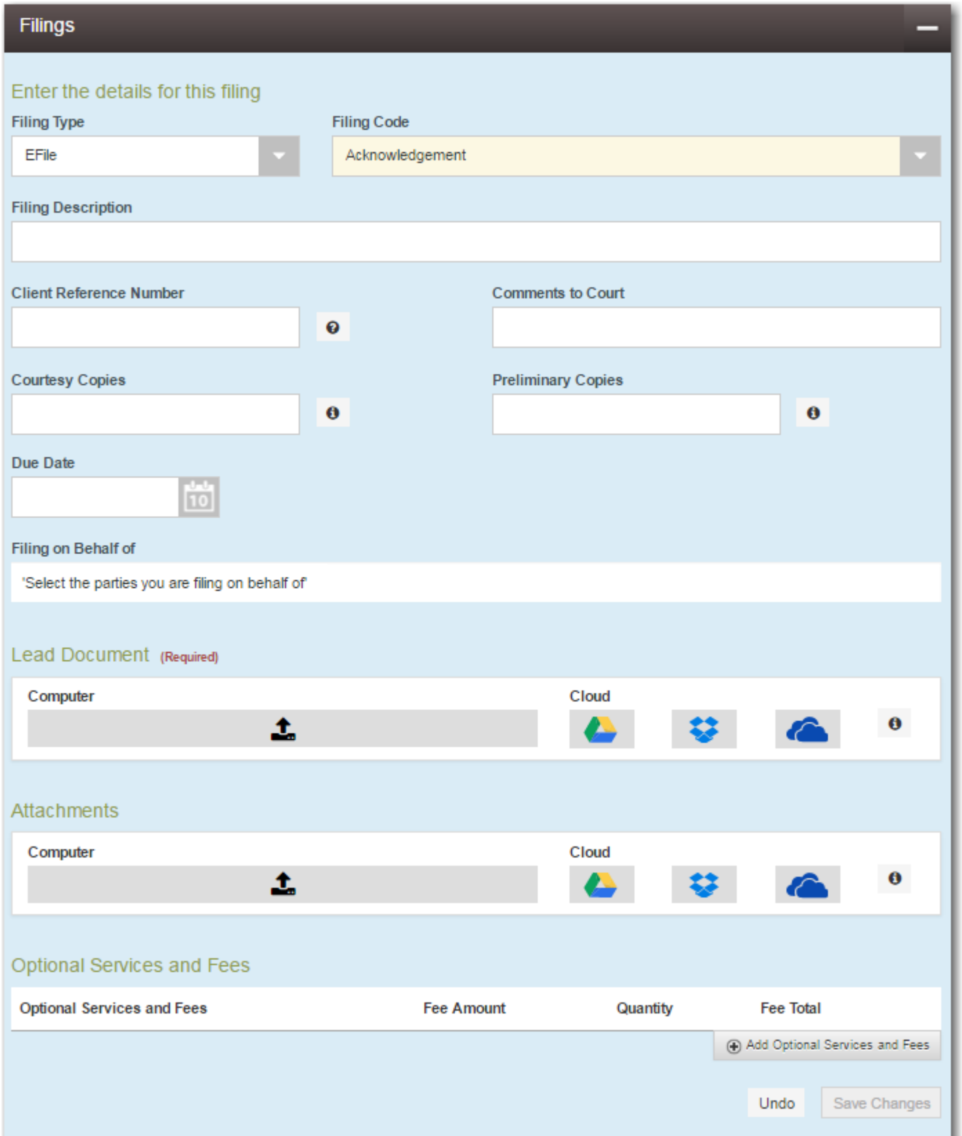


Figure 11.7 – Filings Section

a. Select a filing type from the **Filing Type** drop-down list.

A default filing type can be configured for existing case filings. The default filing type can be set to **EFileAndServe** or just **EFile**.

Note: Serve is not a default option.

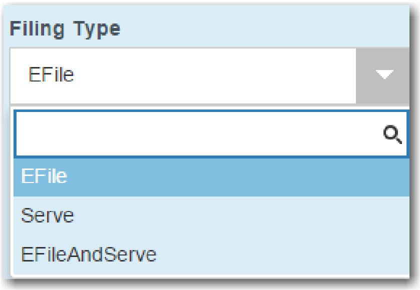


Figure 11.8 – Filing Type Drop-Down List

b. Select a filing code from the **Filing Code** drop-down list.

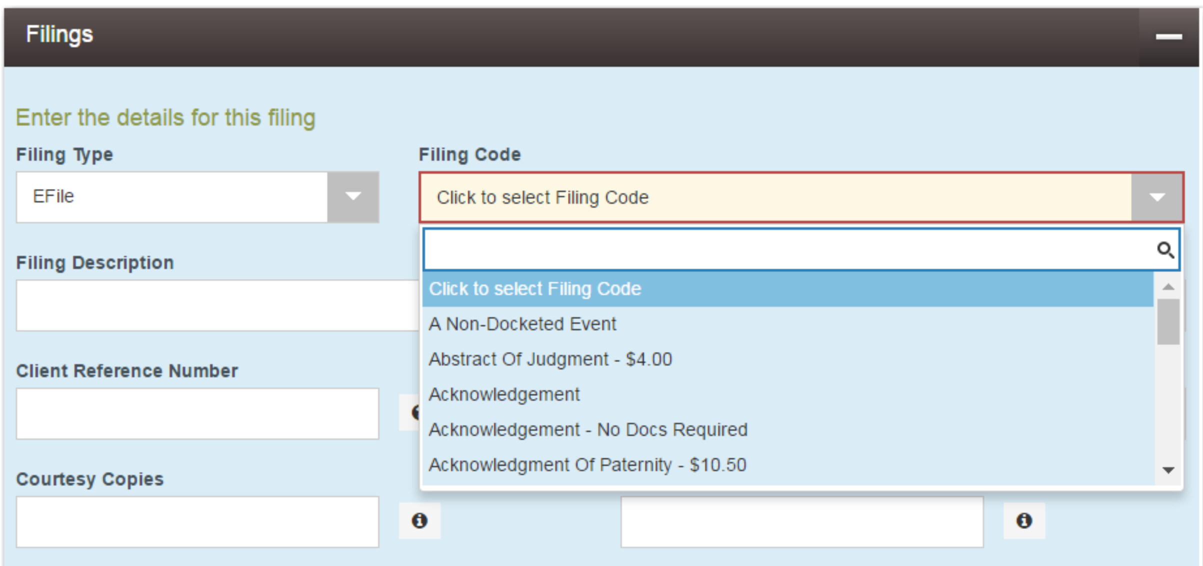


Figure 11.9 – Filing Code Drop-Down List

After you select the filing code, the fee associated with the filing code is displayed.

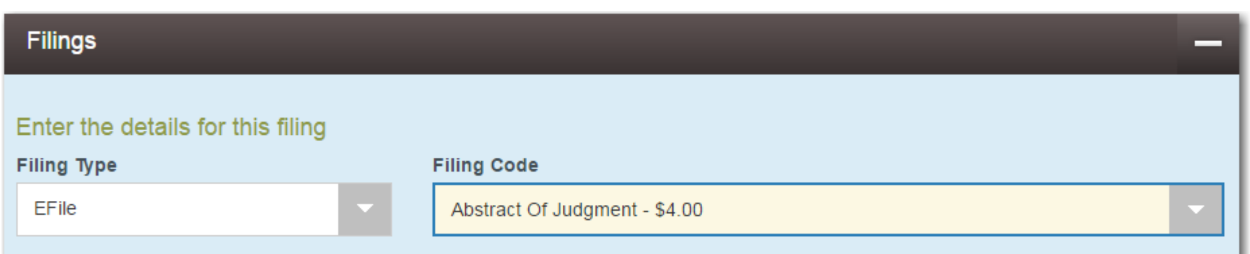


Figure 11.10 – Filing Code Field with the Fee Displayed

c. Type a description of the filing in the **Filing Description** field.
d. Type a client reference number in the **Client Reference Number** field.

Note: A client reference number is a client-created number for internal purposes only. Most courts do not see or refer to the Client Reference Number field for the filing. This is an optional field.

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. If you want to send preliminary copies of the filing to another party, type the recipient's email address in the **Preliminary Copies** field.

h. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

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

A calendar is displayed from which you can select the specified date.

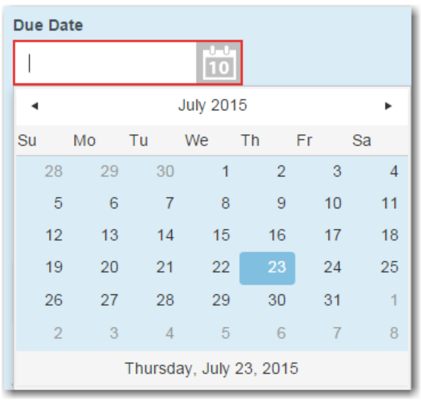


Figure 11.11 – Due Date Calendar

i. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

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

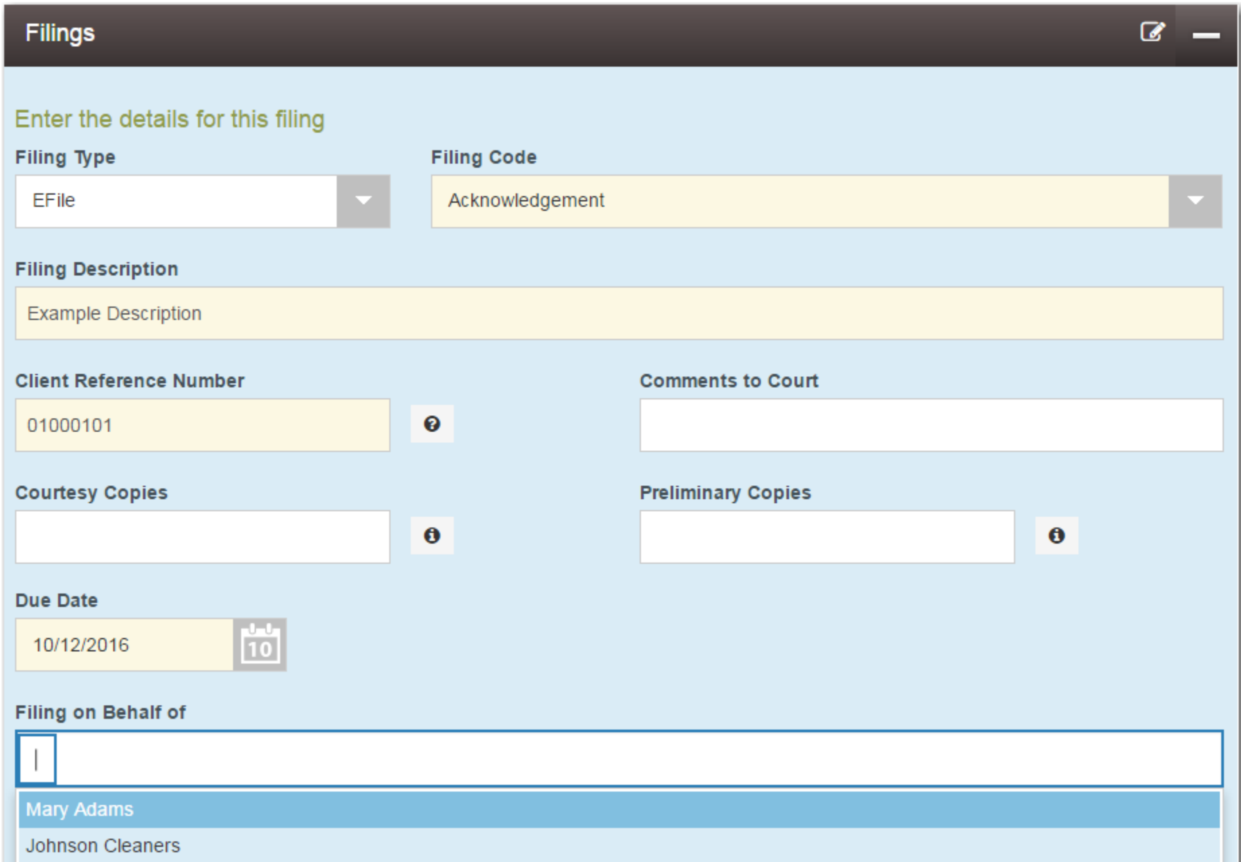


Figure 11.12 – Filing on Behalf of Field in the Filings Section

j. Click the **Lead Document** field to select a lead document to upload. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. Only one document can be uploaded as a lead document.

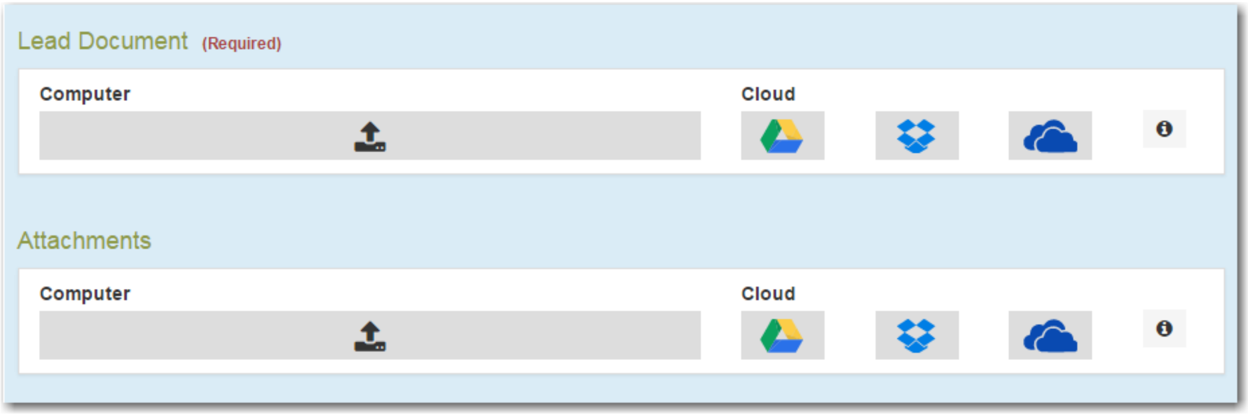


Figure 11.13 – Lead Document and Attachments Fields in the Filings Section

k. Type a name for the lead document in the **Description** field.

Note: Tyler can configure a maximum length for the document name at the client's request. When configured, if a user assigns a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

l. Click the **Security** drop-down list to select the level of security to attach to the document.

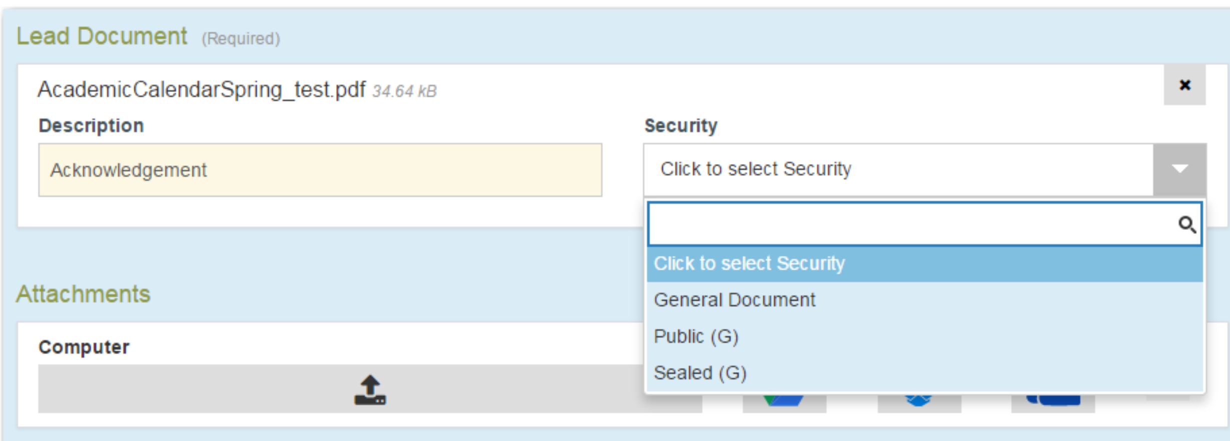


Figure 11.14 – Security Drop-Down List in the Lead Document Section

m. If you have attachments to upload, click the **Attachments** field to select the documents to upload. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

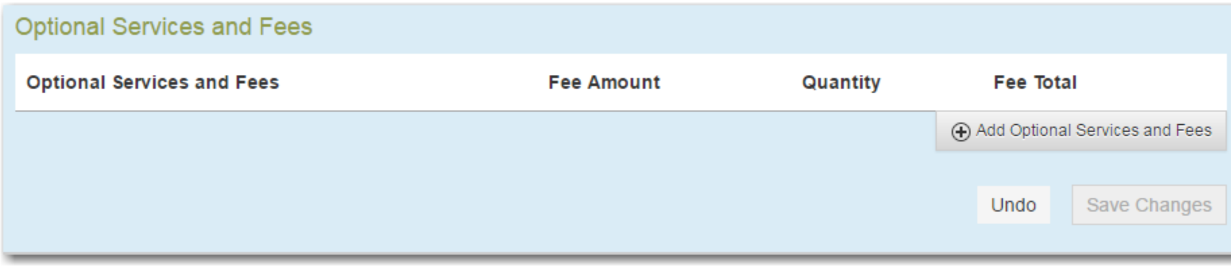
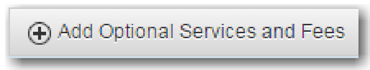


Figure 11.15 – Optional Services and Fees Section

n. If you want to add an optional service to the filing, click 

.

The **Optional Services and Fees** field is displayed.

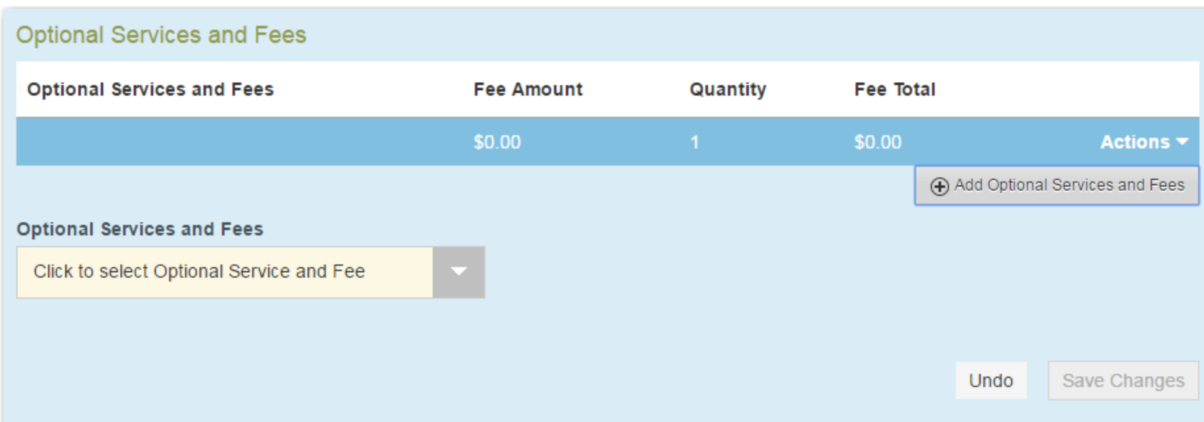


Figure 11.16 – Optional Services and Fees Field in the Optional Services and Fees Section

o. Select the appropriate option from the **Optional Services and Fees** drop-down list.

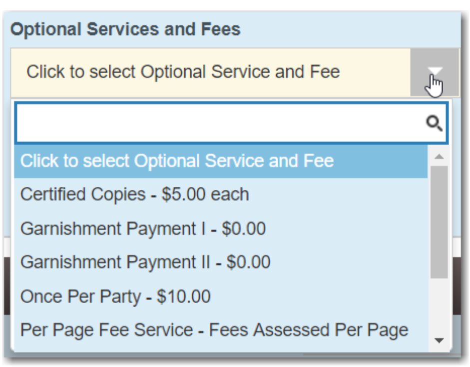


Figure 11.17 – Optional Services and Fees Drop-Down List

The **Enter amount to be paid** field is displayed.

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

Note: The wording displayed on your system may differ from the example provided.

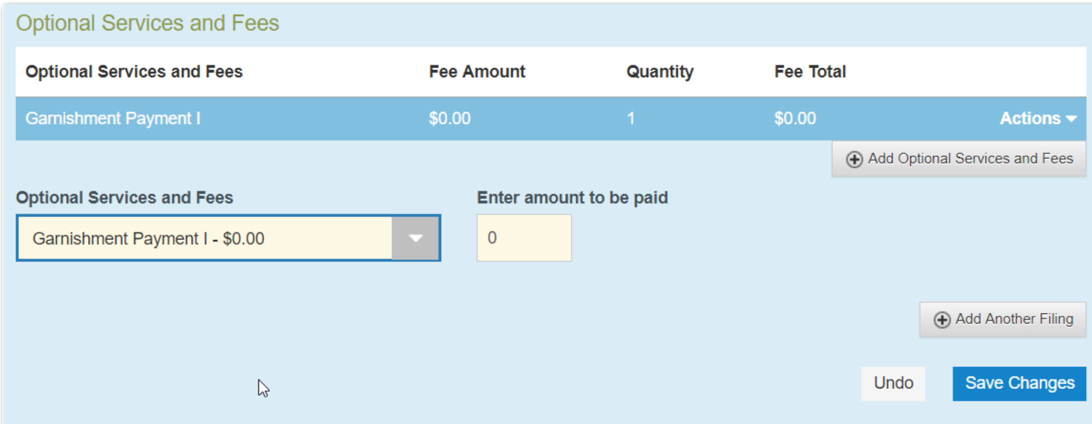


Figure 11.18 – Example of an Optional Services and Fees Section with the Enter Amount to Be Paid Field Displayed

p. Enter the fee for the optional service in the **Enter amount to be paid** field.

q. Click 

.

The fee that you entered is displayed in the **Fee Total** column.

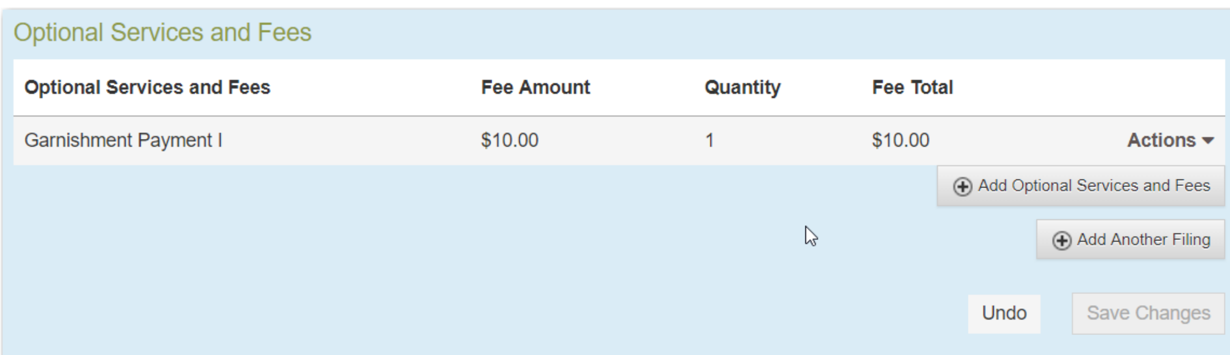


Figure 11.19 – Optional Services and Fees Section with the Fee Amount Displayed

r. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

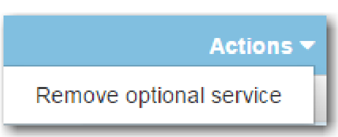


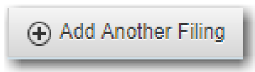
Figure 11.20 – Optional Service Actions Drop-Down List

s. When you are done adding optional services, click 

.

Figure 11.21 – Optional Services and Fees Section with Optional Services Saved

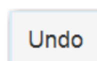
Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

t. If you want to add another filing to the case, click  .

The top of the **Filings** section is displayed, where you can begin another filing.

u. After you have added all of the filings to the case and saved the changes, verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

Note: If you forget to add your name to the service contact list, the system will automatically add it for you, if the system is configured to do so.

v. Click  to save your changes, or click  to cancel the action.

11. Complete the fields in the **Fees** section.

Note: Your credit card is authorized when submitted. However, the transaction fees are not posted to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.

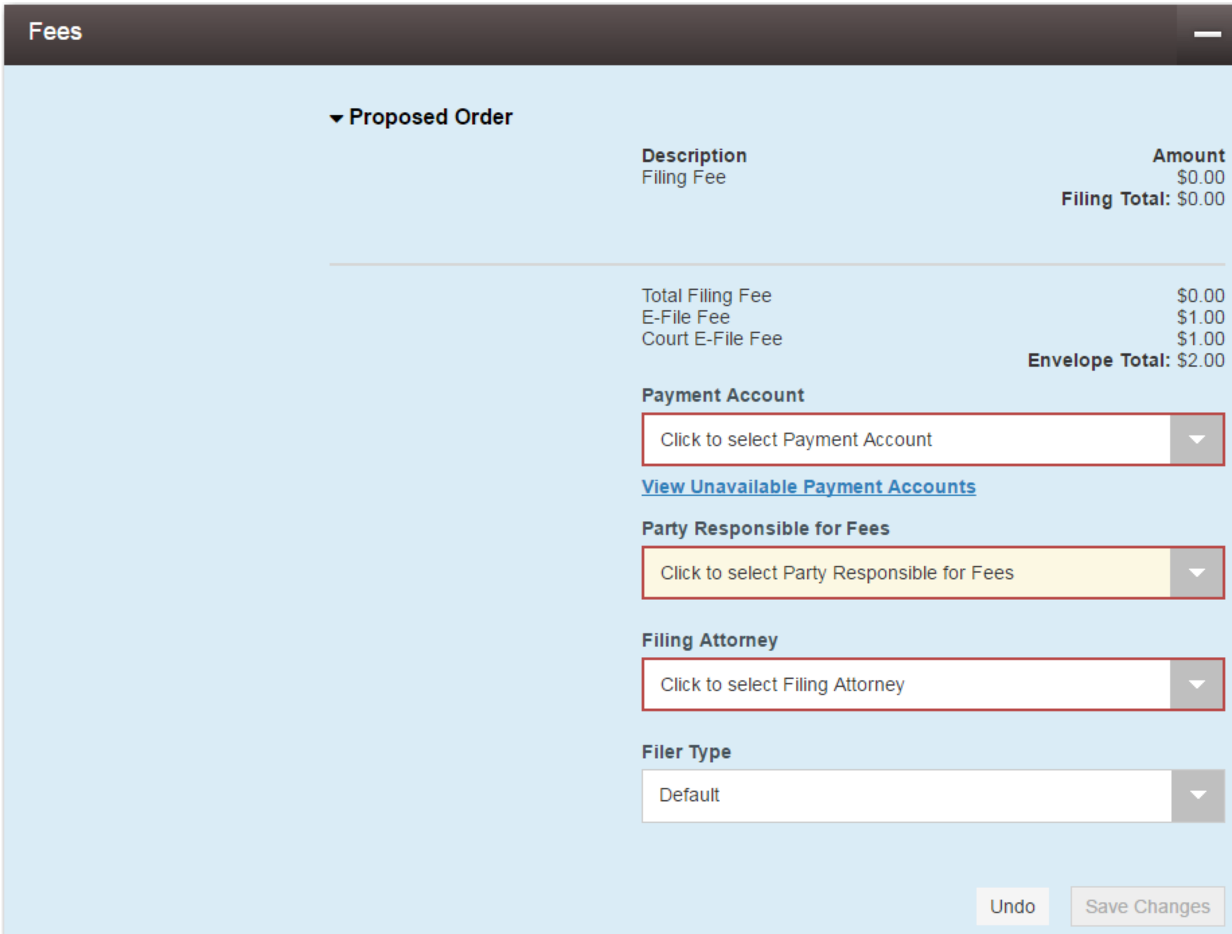


Figure 11.22 – Fees Section

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

   Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

b. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

c. Select the filing attorney from the **Filing Attorney** drop-down list.

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

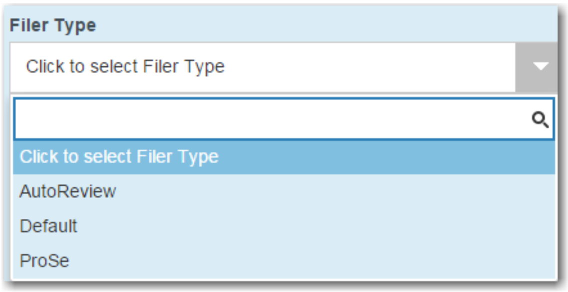


Figure 11.23 – Filer Type Drop-Down List

e. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.

12. After completing the fields in all of the sections on the page, perform one of the following actions:

    - Click **Save as Draft** to stop working on your filing and resume work at a later time.
    - Click **Summary** to review a summary of your filing.

13. If you clicked **Summary**, review the filing for accuracy. If you need to make any changes, click **Back** to return to the previous page. Make any necessary corrections, and then click **Summary** again.

14. When you are satisfied with the information in your filing, click **Submit**.

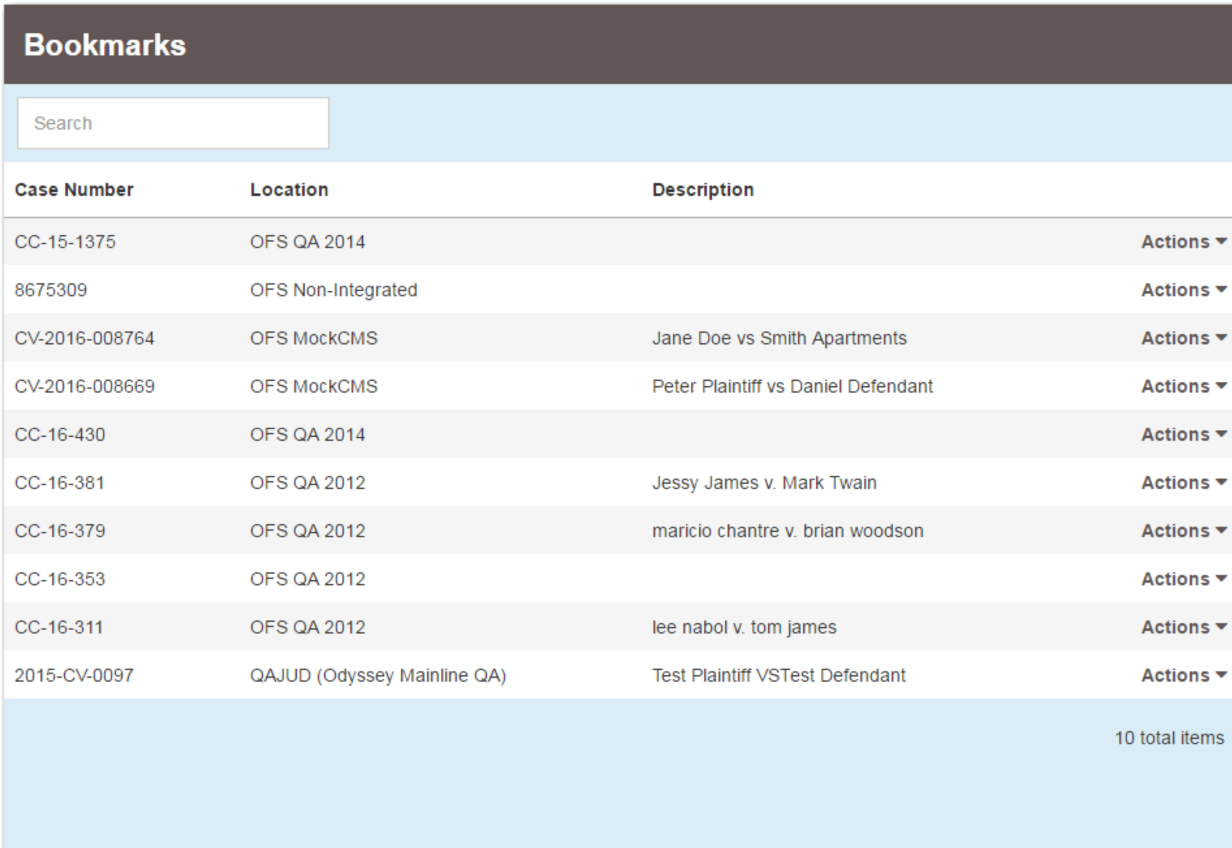
    A new envelope of your filing is included on the *Filing History* page.

Filing into an Existing Case from the Bookmarks Page

To file into an existing case from the *Bookmarks* page, perform the following steps:

1. On the *Filer Dashboard* page, from the **Actions** drop-down list, click **Bookmarks**.

   The *Bookmarks* page is displayed.



Bookmarks

Search

Case Number	Location	Description	
CC-15-1375	OFS QA 2014		Actions
8675309	OFS Non-Integrated		Actions
CV-2016-008764	OFS MockCMS	Jane Doe vs Smith Apartments	Actions
CV-2016-008669	OFS MockCMS	Peter Plaintiff vs Daniel Defendant	Actions
CC-16-430	OFS QA 2014		Actions
CC-16-381	OFS QA 2012	Jessy James v. Mark Twain	Actions
CC-16-379	OFS QA 2012	maricio chantre v. brian woodson	Actions
CC-16-353	OFS QA 2012		Actions
CC-16-311	OFS QA 2012	lee nabol v. tom james	Actions
2015-CV-0097	QAJUD (Odyssey Mainline QA)	Test Plaintiff VSTest Defendant	Actions

10 total items

Figure 11.24 – Bookmarks Page

2. Locate the case that you want to file into.
3. From the **Actions** drop-down list for the specified case, select **File Into Case**.

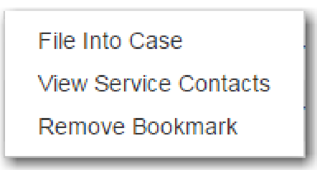


Figure 11.25 – Actions Drop-Down List

The **Case Information** fields are already populated since this is an existing case.

The **Case Cross Reference Number** section is displayed after the **Case Information** section.

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

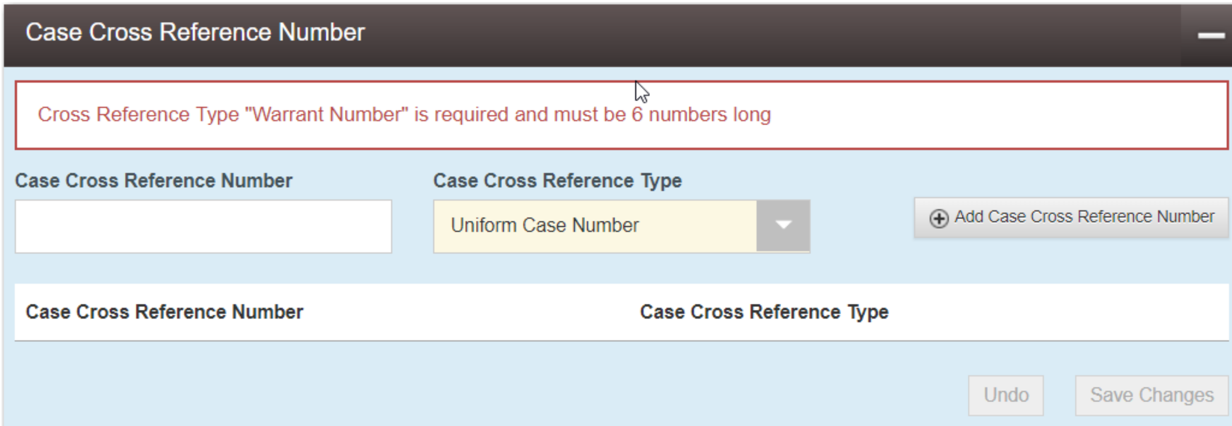


Figure 11.26 – Case Cross Reference Number Section

4. Type the case cross reference number in the **Case Cross Reference Number** field.

   Note: The case cross reference number must be six numbers long.

5. Select the case cross reference type from the **Case Cross Reference Type** drop-down list.

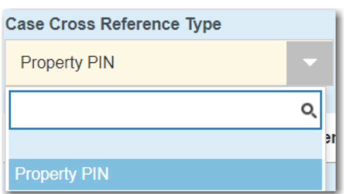
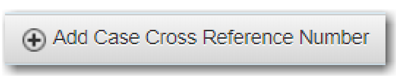


Figure 11.27 – Case Cross Reference Type Drop-Down List

6. Click 

.

   The case cross reference number and case cross reference type that you added are displayed.

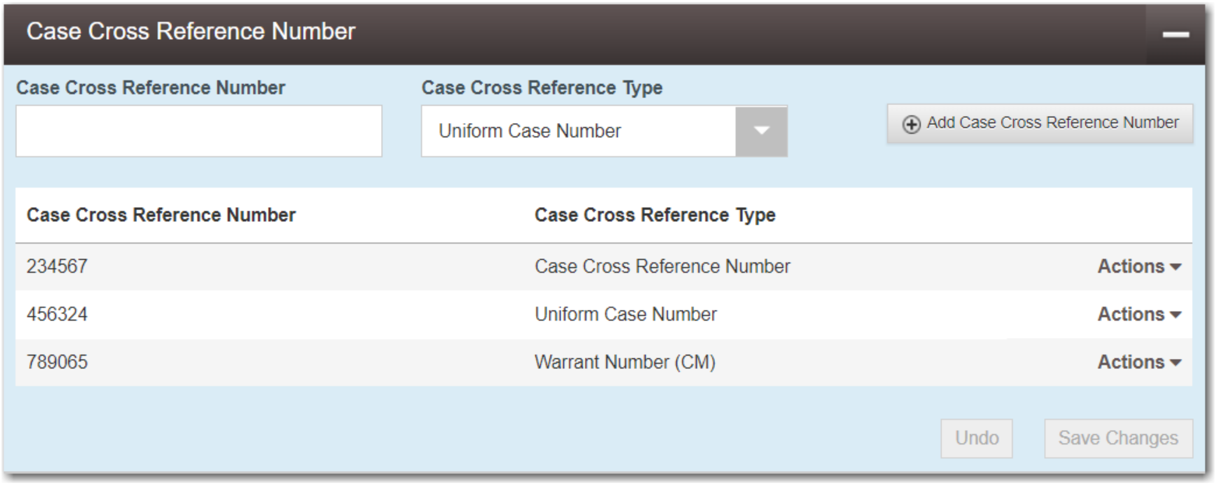


Figure 11.28 – Sample Case Cross Reference Number Section

7. If you want to add another case cross reference to the filing, repeat steps 4 through 6. Continue adding case cross references until you are done.
8. If you want to remove a case cross reference that you previously entered, select **Remove** from the **Actions** drop-down list.

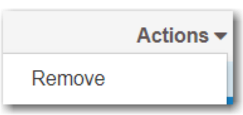
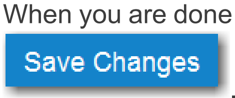


Figure 11.29 – Case Cross Reference Number Actions Drop-Down List

9. When you are done adding all of the case cross reference numbers to the filing, click 

.

   The **Party Information** fields are already populated since this is an existing case. You can immediately view the parties associated with the case.
10. Complete the filing details in the **Filings** section.

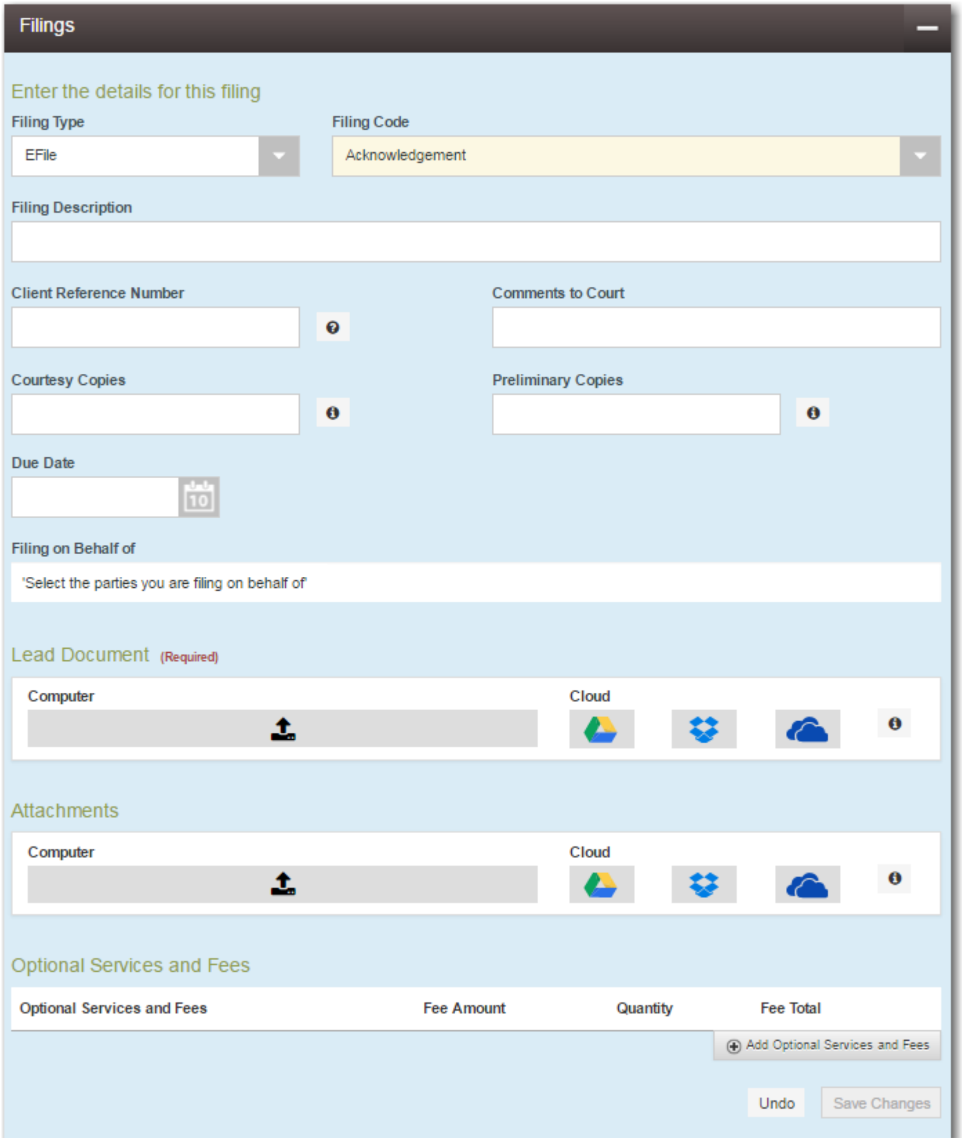


Figure 11.30 – Filings Section

a. Select a filing type from the **Filing Type** drop-down list.

   A default filing type can be configured for existing case filings. The default filing type can be set to **EFileAndServe** or just **EFile**.

   Note: Serve is not a default option.

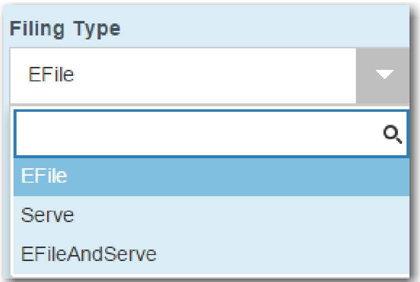


Figure 11.31 – Filing Type Drop-Down List

b. Select a filing code from the **Filing Code** drop-down list.

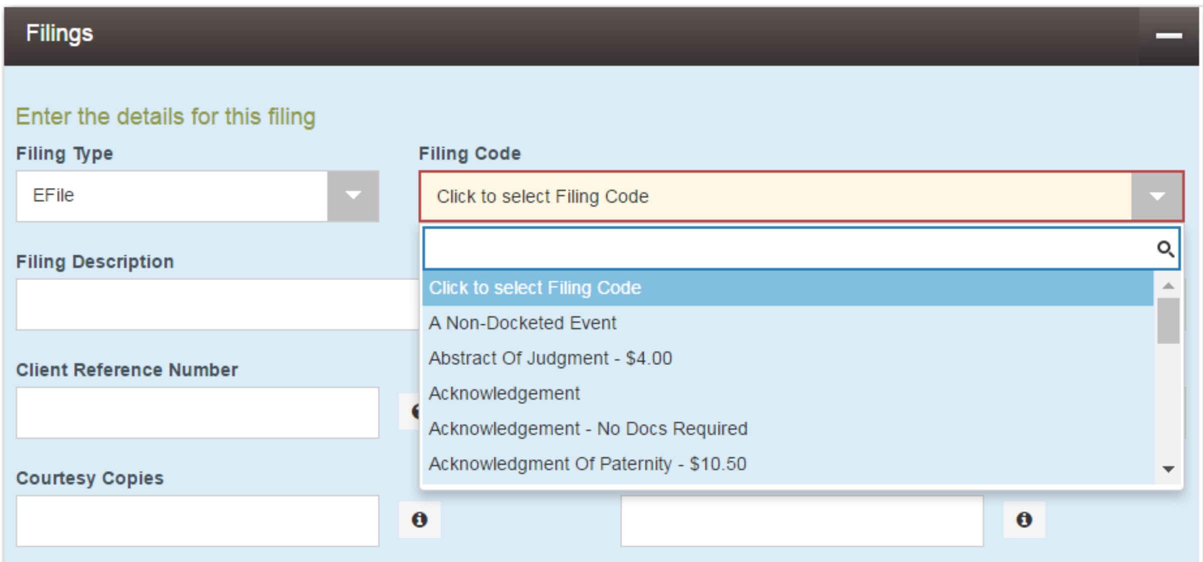


Figure 11.32 – Filing Code Drop-Down List

After you select the filing code, the fee associated with the filing code is displayed.

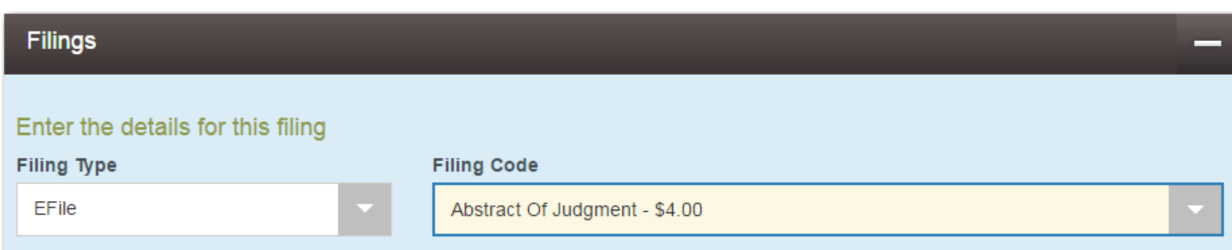


Figure 11.33 – Filing Code Field with the Fee Displayed

c. Type a description of the filing in the **Filing Description** field.

d. Type a client reference number in the **Client Reference Number** field.

Note: A client reference number is a client-created number for internal purposes only. Most courts do not see or refer to the Client Reference Number field for the filing. This is an optional field.

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. If you want to send preliminary copies of the filing to another party, type the recipient's email address in the **Preliminary Copies** field.

h. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

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

A calendar is displayed from which you can select the specified date.

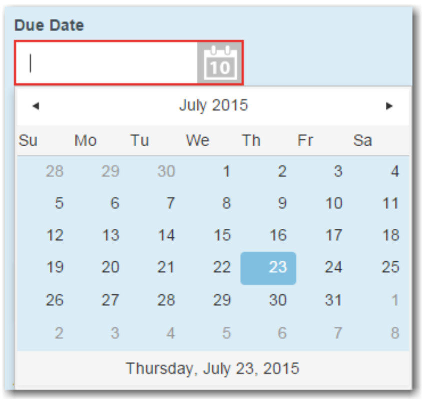


Figure 11.34 – Due Date Calendar

i. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

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

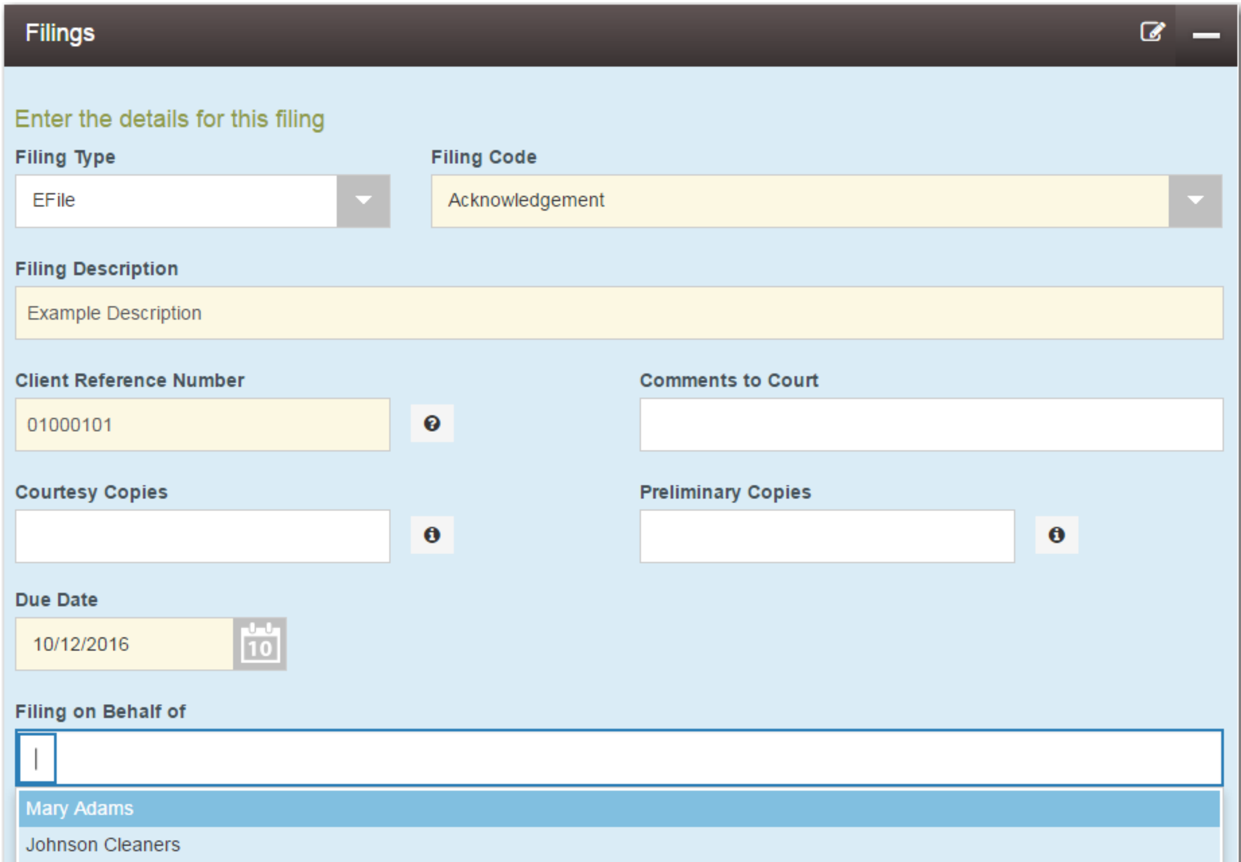


Figure 11.35 – Filing on Behalf of Field in the Filings Section

j. Click the **Lead Document** field to select a lead document to upload. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. Only one document can be uploaded as a lead document.

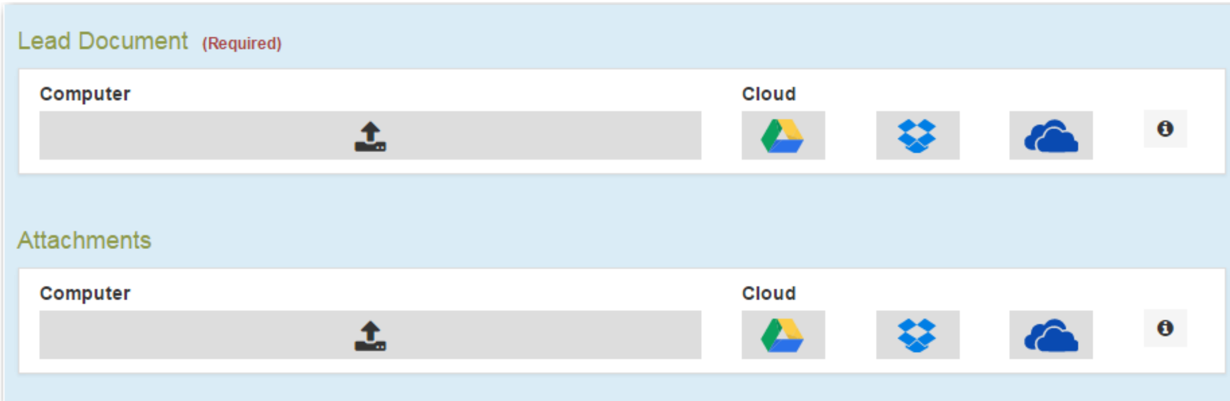


Figure 11.36 – Lead Document and Attachments Fields in the Filings Section

k. Type a name for the lead document in the **Description** field.

Note: Tyler can configure a maximum length for the document name at the client's request. When configured, if a user assigns a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

l. Click the **Security** drop-down list to select the level of security to attach to the document.

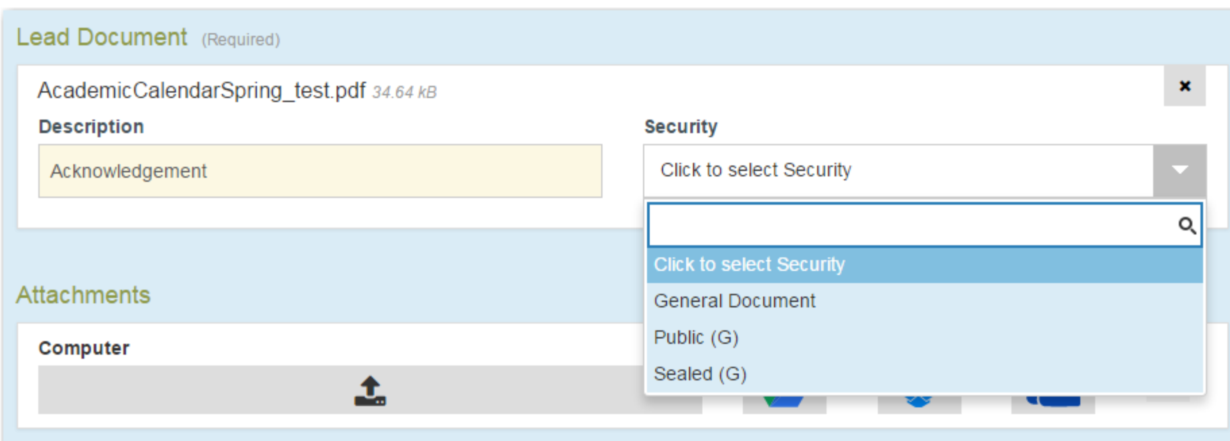


Figure 11.37 – Security Drop-Down List in the Lead Document Section

m. If you have attachments to upload, click the **Attachments** field to select the documents to upload. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

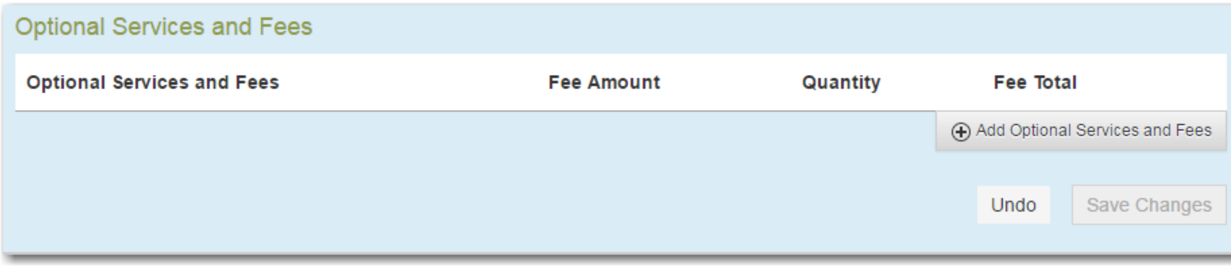
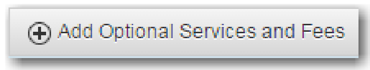


Figure 11.38 – Optional Services and Fees Section

n. If you want to add an optional service to the filing, click  .

The **Optional Services and Fees** field is displayed.

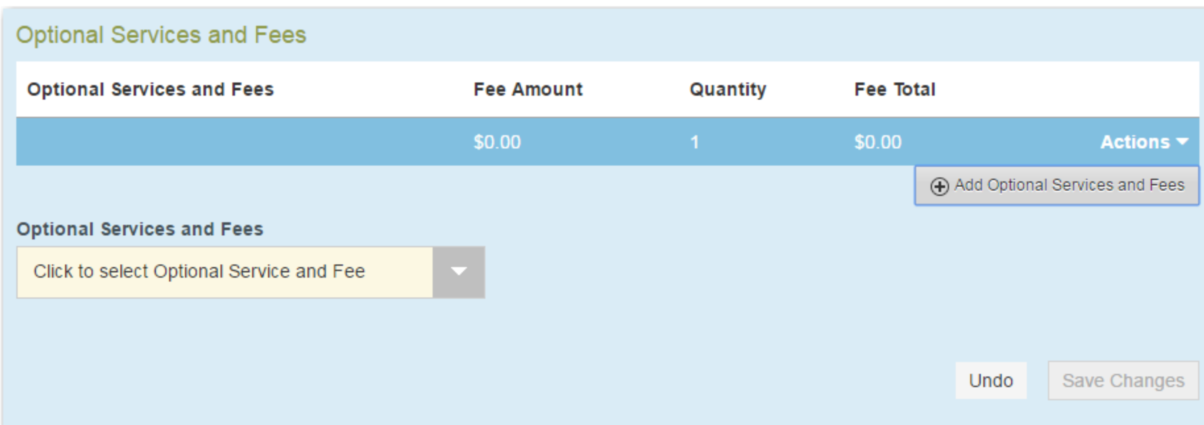


Figure 11.39 – Optional Services and Fees Field in the Optional Services and Fees Section

o. Select the appropriate option from the **Optional Services and Fees** drop-down list.

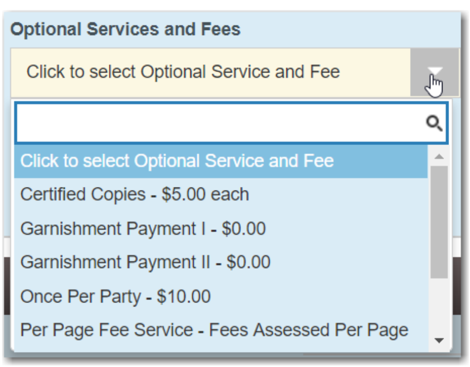


Figure 11.40 – Optional Services and Fees Drop-Down List

The **Enter amount to be paid** field is displayed.

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

Note: The wording displayed on your system may differ from the example provided.

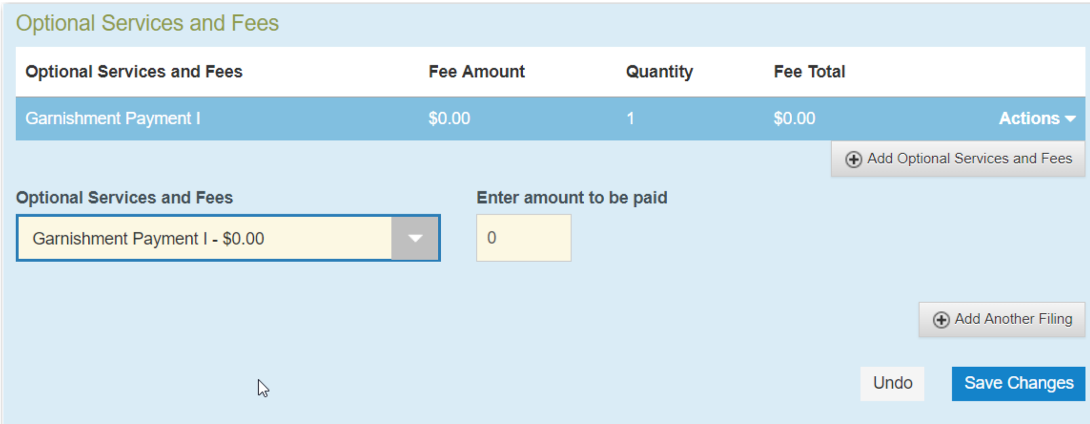


Figure 11.41 – Example of an Optional Services and Fees Section with the Enter Amount to Be Paid Field Displayed

p. Enter the fee for the optional service in the **Enter amount to be paid** field.

q. Click 

.

The fee that you entered is displayed in the **Fee Total** column.

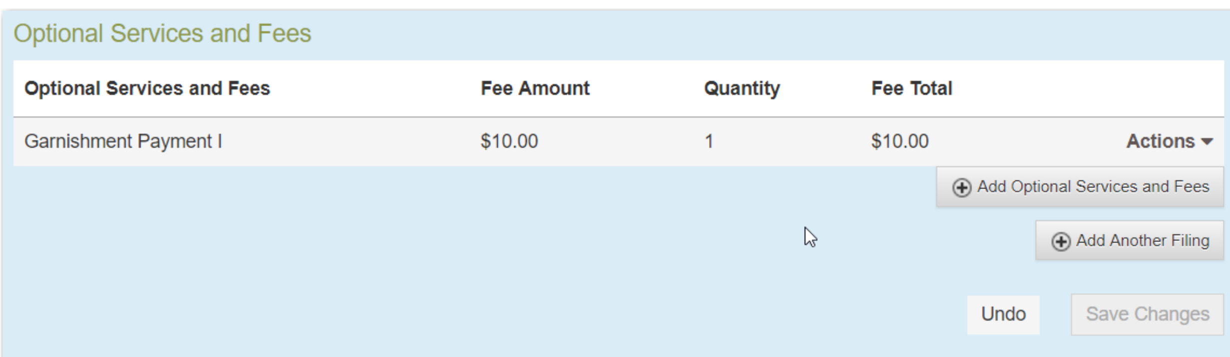


Figure 11.42 – Optional Services and Fees Section with the Fee Amount Displayed

r. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

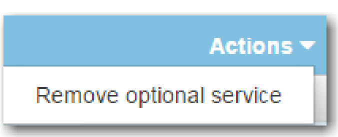


Figure 11.43 – Optional Service Actions Drop-Down List

s. When you are done adding optional services, click 

.

Figure 11.44 – Optional Services and Fees Section with Optional Services Saved

Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

t. If you want to add another filing to the case, click Add Another Filing.

The top of the **Filings** section is displayed, where you can begin another filing.

u. After you have added all of the filings to the case and saved the changes, verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

Note: If you forget to add your name to the service contact list, the system will automatically add it for you, if the system is configured to do so.

v. Click Save Changes to save your changes, or click Undo to cancel the action.

11. Complete the fields in the **Fees** section.

Note: Your credit card is authorized when submitted. However, the transaction fees are not posted to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.

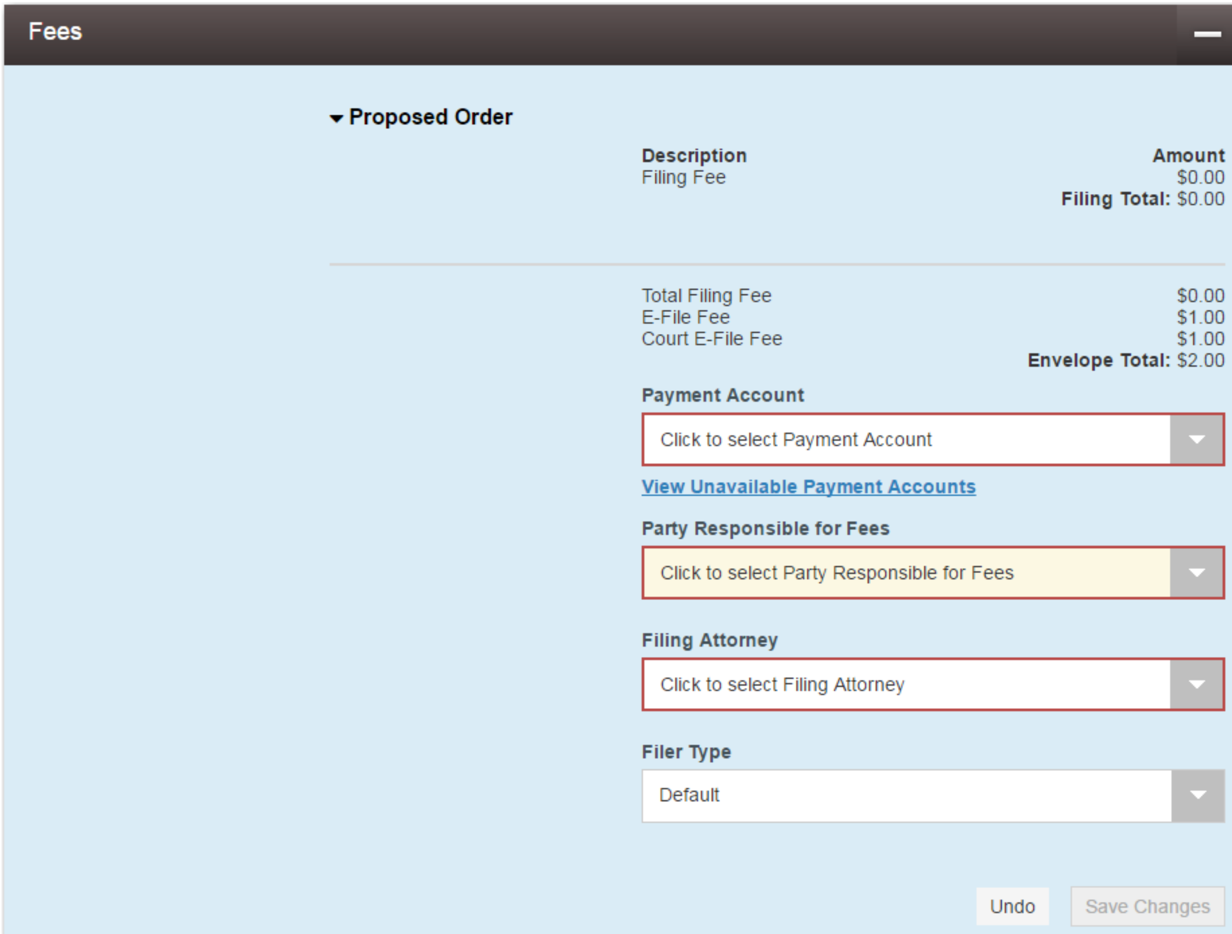


Figure 11.45 – Fees Section

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

   Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

b. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

c. Select the filing attorney from the **Filing Attorney** drop-down list.

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

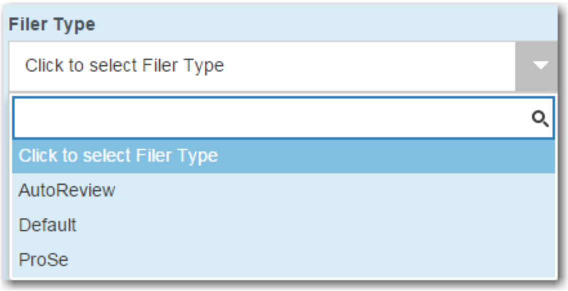


Figure 11.46 – Filer Type Drop-Down List

e. Click Save Changes to save your changes, or click Undo to cancel the action.

12. After completing the fields in all of the sections on the page, perform one of the following actions:
    - Click Save as Draft to stop working on your filing and resume work at a later time.
    - Click Summary to review a summary of your filing.

13. If you clicked Summary, review the filing for accuracy. If you need to make any changes, click Back to return to the previous page. Make any necessary corrections, and then click Summary again.

14. When you are satisfied with the information in your filing, click Submit.

    A new envelope of your filing is included on the *Filing History* page.

Filing into an Existing Case from the Filer Dashboard Page

To file into an existing case from the *Filer Dashboard* page, perform the following steps:

1. On the *Filer Dashboard* page, click **File into Existing Case**.

   Note: You could also click File Into Existing Case from the Actions drop-down list on the *Filer Dashboard* page.

   The *File Into Existing Case* page is displayed.

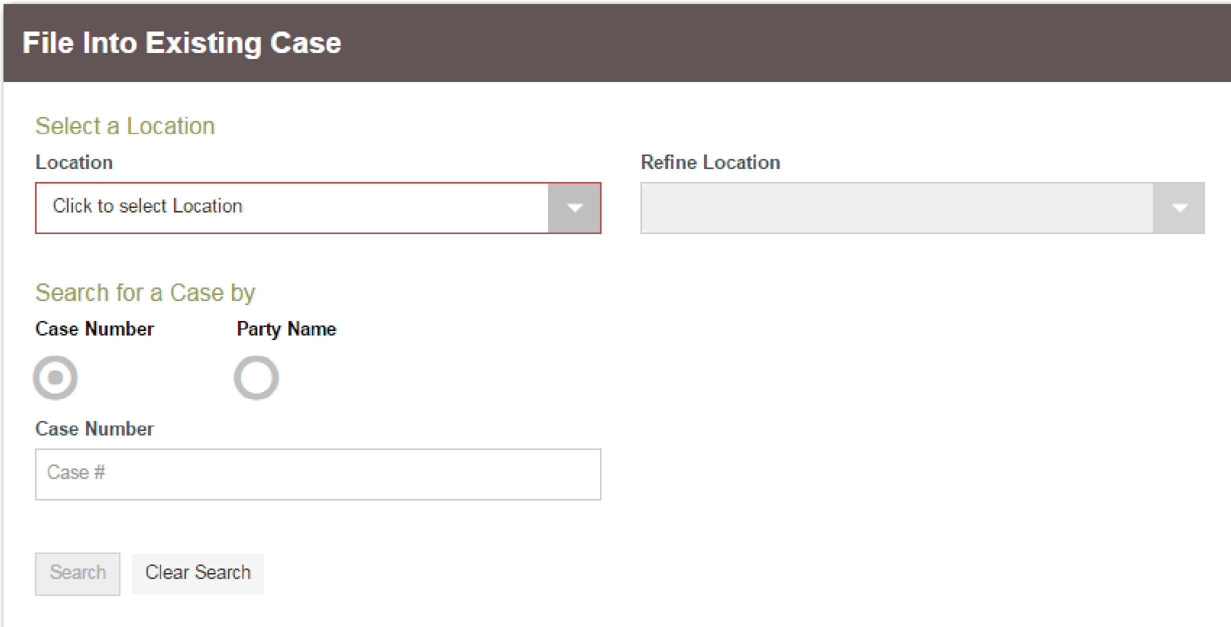


Figure 11.47 – File Into Existing Case Page

2. Select the county or district location from the **Location** drop-down list.
3. Select the specific court from the **Refine Location** drop-down list.

   Note: The items in the list are based on the court that you previously selected.

   Note: The location filtering feature is configured by Tyler and may not be available on your system.
4. Click the search option that you plan to use: **Case Number** or **Party Name**.
5. Enter the search criteria, and then click **Search**.
6. When the correct case is displayed, select **File Into Case** from the **Actions** drop-down list for the specified case.

Figure 11.48 – Actions Drop-Down List

The **Case Information** fields are already populated since this is an existing case.

The **Case Cross Reference Number** section is displayed after the **Case Information** section.

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

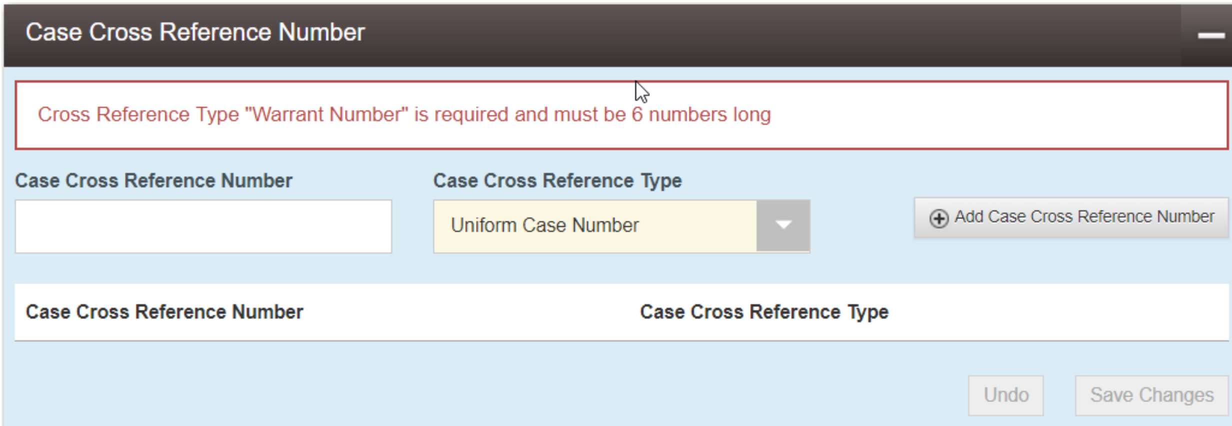


Figure 11.49 – Case Cross Reference Number Section

7. Type the case cross reference number in the **Case Cross Reference Number** field.

   Note: The case cross reference number must be six numbers long.

8. Select the case cross reference type from the **Case Cross Reference Type** drop-down list.

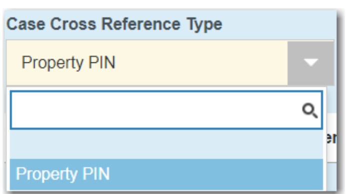
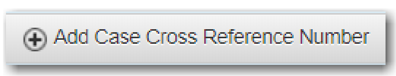


Figure 11.50 – Case Cross Reference Type Drop-Down List

9. Click 

.

   The case cross reference number and case cross reference type that you added are displayed.

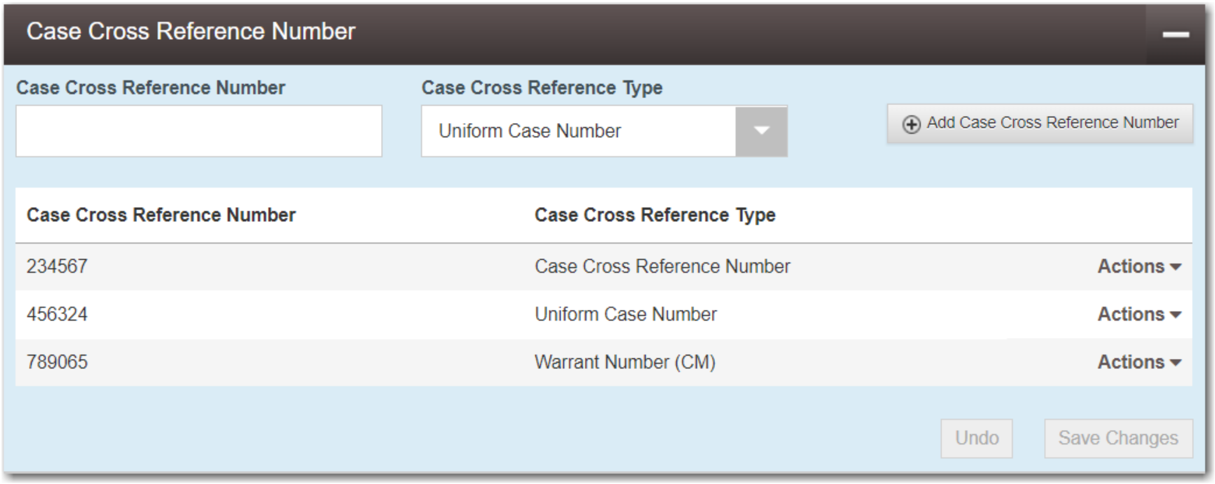


Figure 11.51 – Sample Case Cross Reference Number Section

10. If you want to add another case cross reference to the filing, repeat steps 7 through 9. Continue adding case cross references until you are done.
11. If you want to remove a case cross reference that you previously entered, select **Remove** from the **Actions** drop-down list.

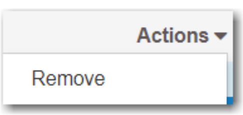
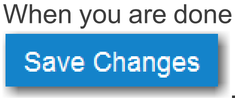


Figure 11.52 – Case Cross Reference Number Actions Drop-Down List

12. When you are done adding all of the case cross reference numbers to the filing, click



.

The **Party Information** fields are already populated since this is an existing case. You can immediately view the parties associated with the case.

13. Complete the filing details in the **Filings** section.

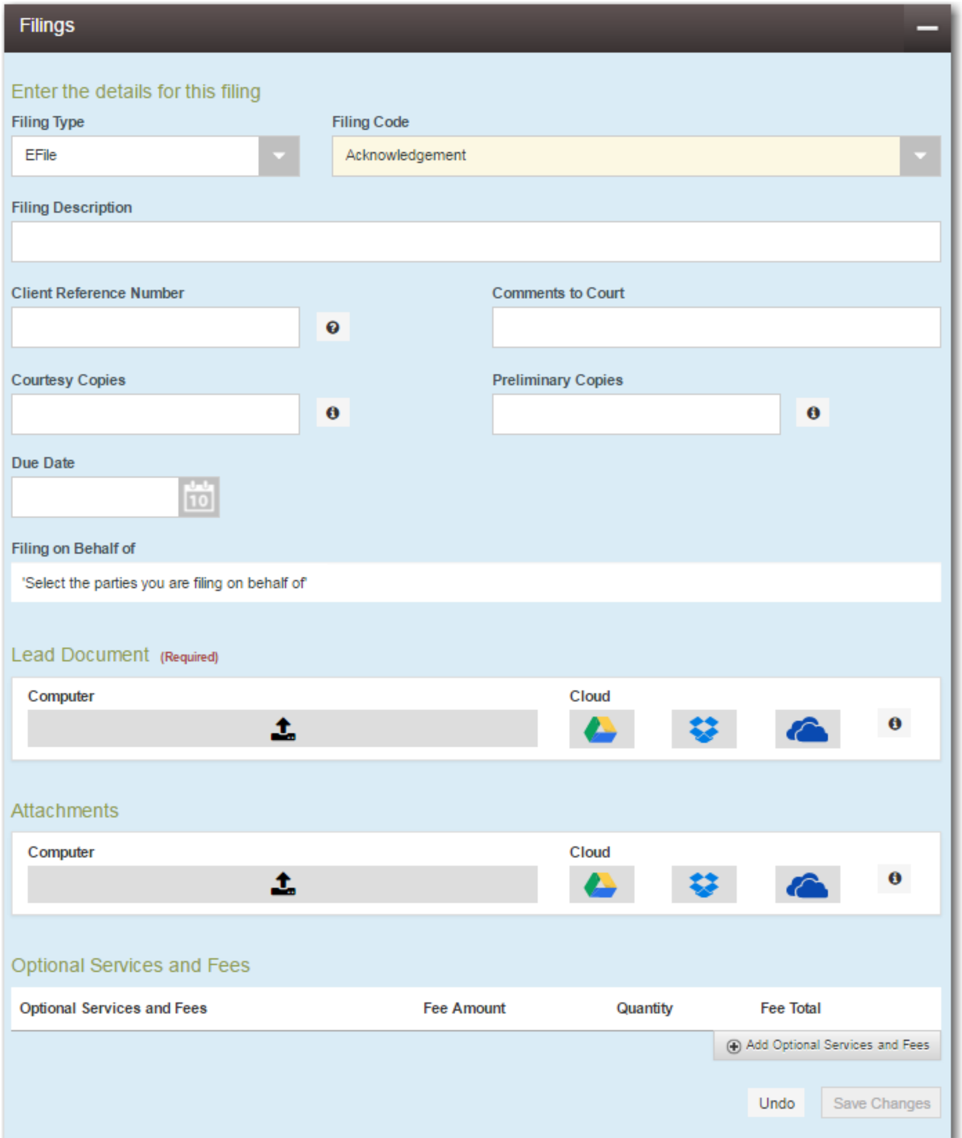


Figure 11.53 – Filings Section

a. Select a filing type from the **Filing Type** drop-down list.

   A default filing type can be configured for existing case filings. The default filing type can be set to **EFileAndServe** or just **EFile**.

   Note: Serve is not a default option.

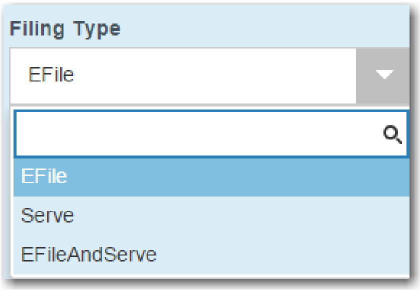


Figure 11.54 – Filing Type Drop-Down List

b. Select a filing code from the **Filing Code** drop-down list.

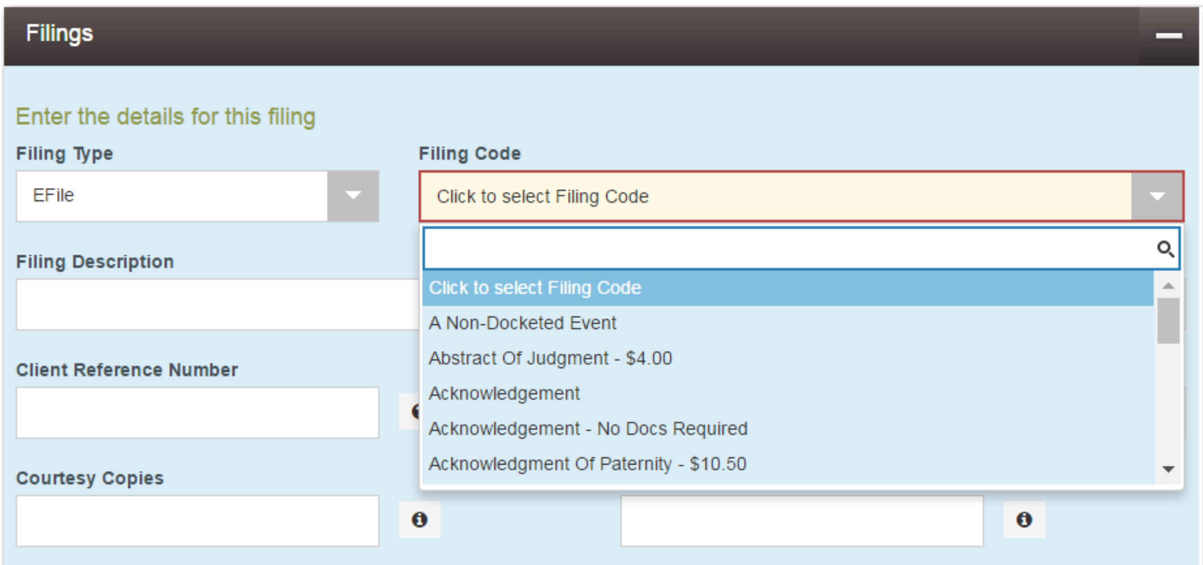


Figure 11.55 – Filing Code Drop-Down List

After you select the filing code, the fee associated with the filing code is displayed.

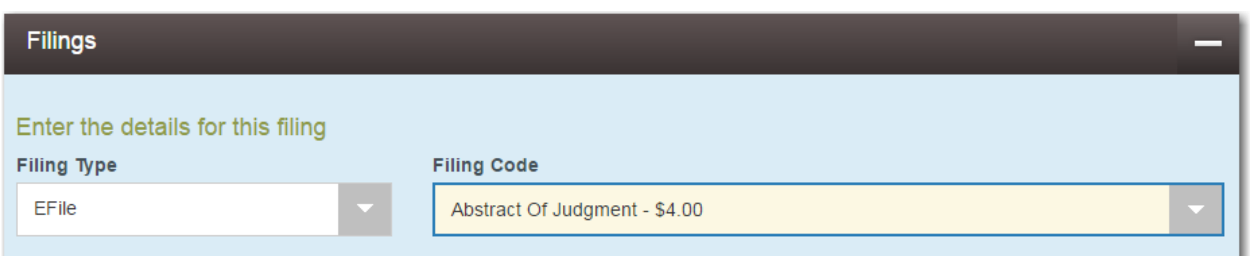


Figure 11.56 – Filing Code Field with the Fee Displayed

c. Type a description of the filing in the **Filing Description** field.

d. Type a client reference number in the **Client Reference Number** field.

Note: A client reference number is a client-created number for internal purposes only. Most courts do not see or refer to the Client Reference Number field for the filing. This is an optional field.

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. If you want to send preliminary copies of the filing to another party, type the recipient's email address in the **Preliminary Copies** field.

h. Enter the date the filing is due in the **Due Date** field by clicking the calendar icon.

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

A calendar is displayed from which you can select the specified date.

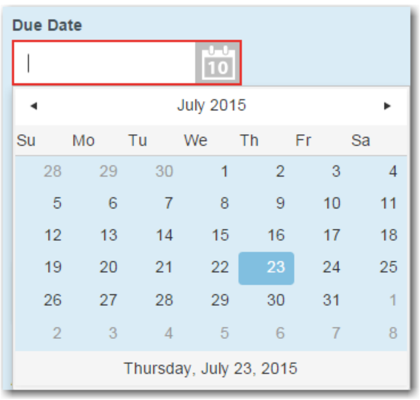


Figure 11.57 – Due Date Calendar

i. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

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

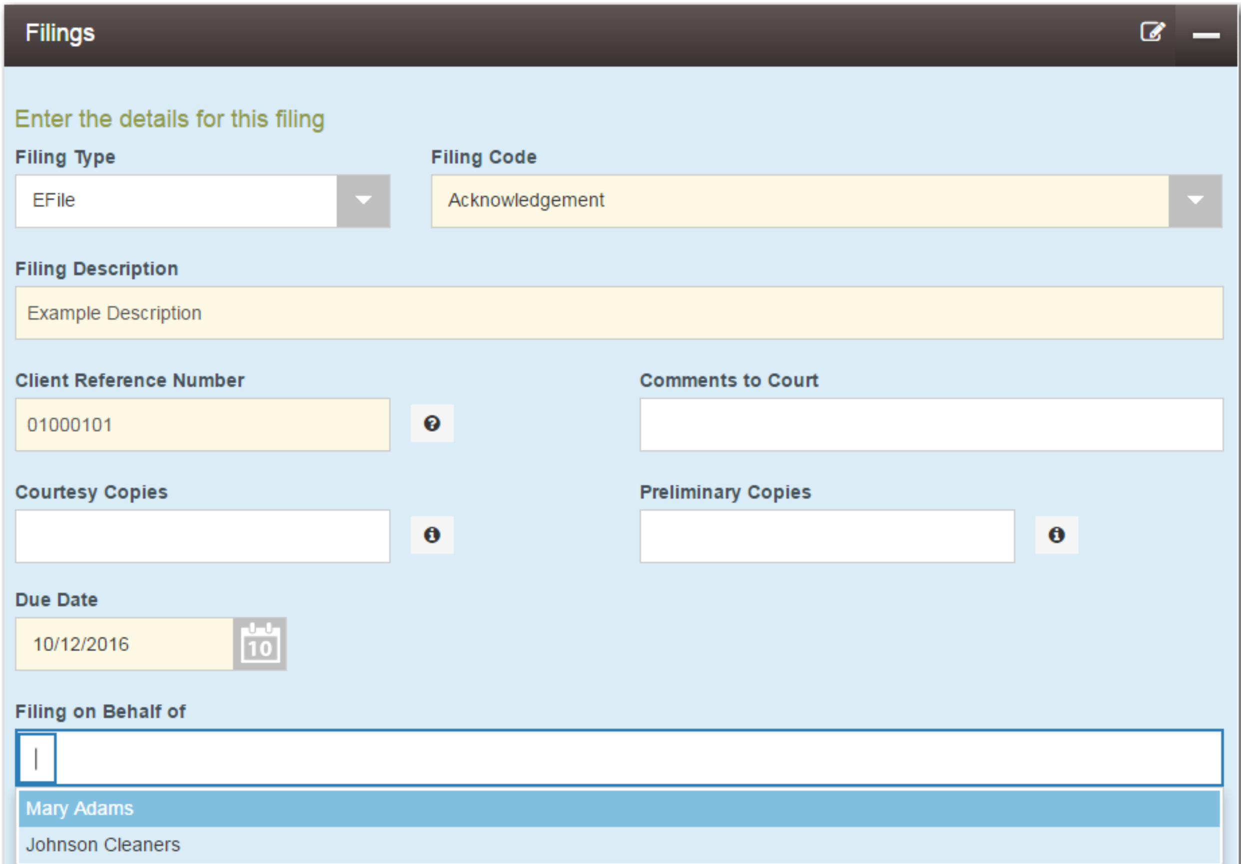


Figure 11.58 – Filing on Behalf of Field in the Filings Section

j. Click the **Lead Document** field to select a lead document to upload. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. Only one document can be uploaded as a lead document.

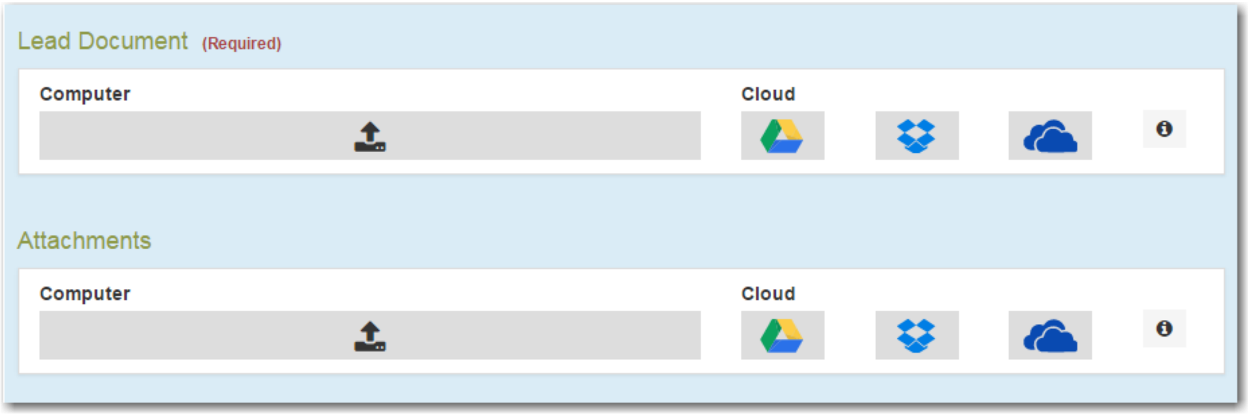


Figure 11.59 – Lead Document and Attachments Fields in the Filings Section

k. Type a name for the lead document in the **Description** field.

Note: Tyler can configure a maximum length for the document name at the client's request. When configured, if a user assigns a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

l. Click the **Security** drop-down list to select the level of security to attach to the document.

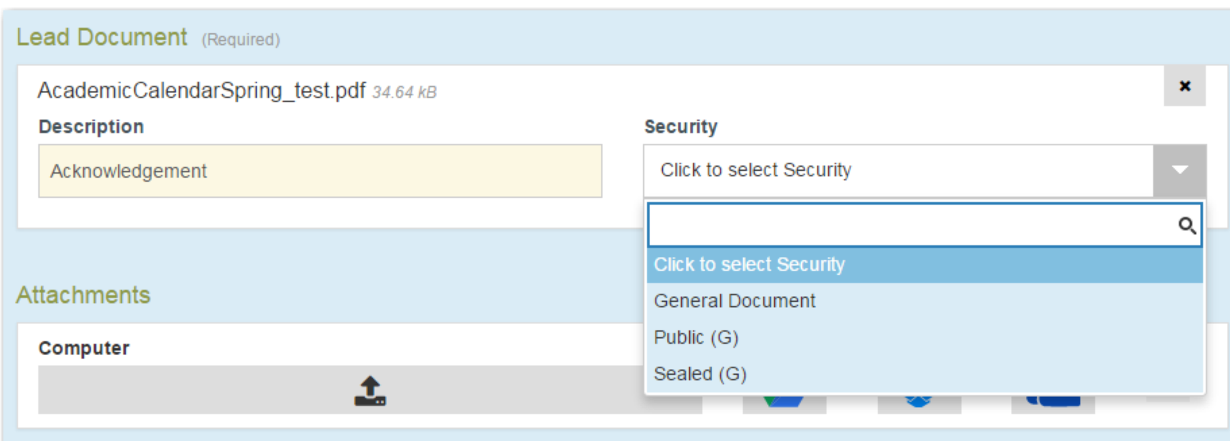


Figure 11.60 – Security Drop-Down List in the Lead Document Section

m. If you have attachments to upload, click the **Attachments** field to select the documents to upload. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

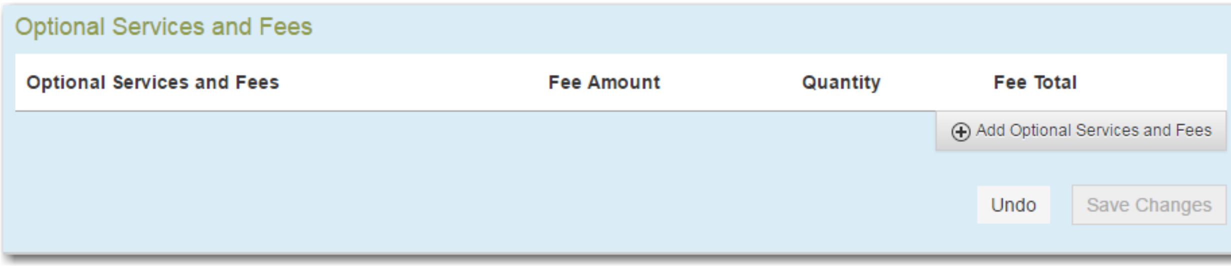
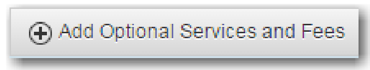


Figure 11.61 – Optional Services and Fees Section

n. If you want to add an optional service to the filing, click 

.

The **Optional Services and Fees** field is displayed.

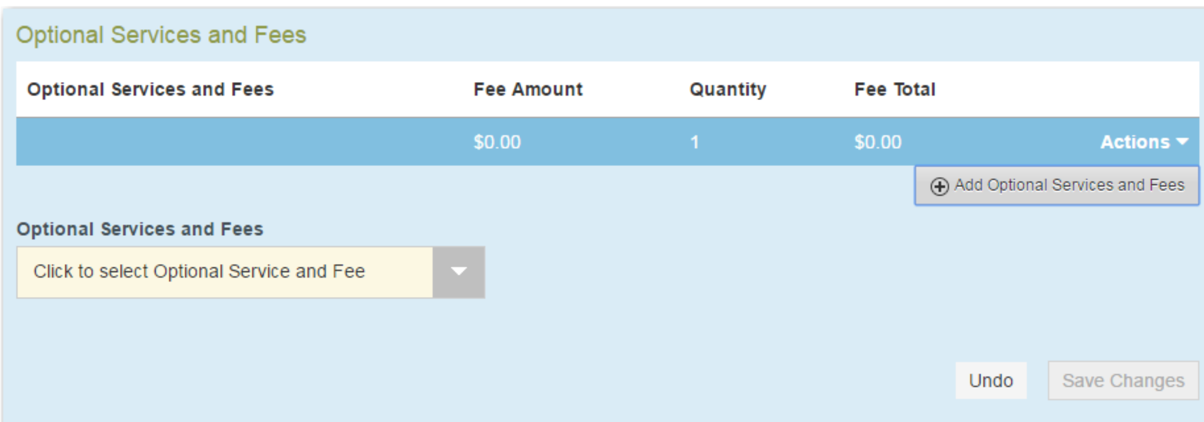


Figure 11.62 – Optional Services and Fees Field in the Optional Services and Fees Section

o. Select the appropriate option from the **Optional Services and Fees** drop-down list.

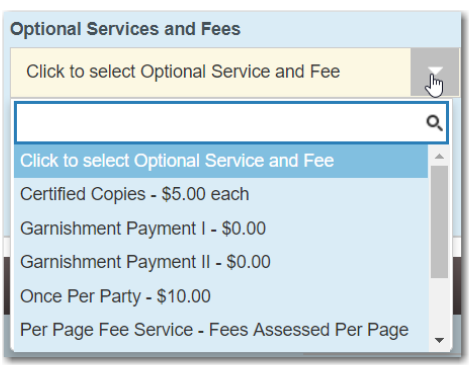


Figure 11.63 – Optional Services and Fees Drop-Down List

The **Enter amount to be paid** field is displayed.

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

Note: The wording displayed on your system may differ from the example provided.

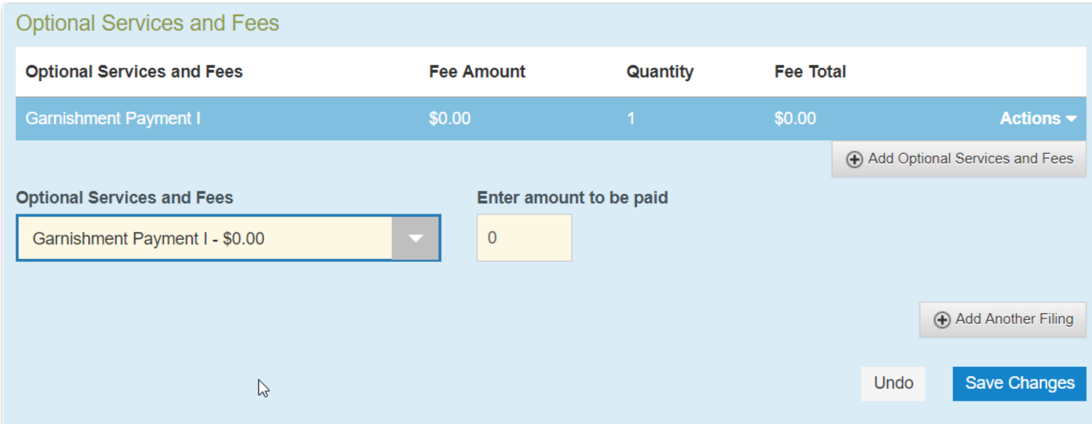


Figure 11.64 – Example of an Optional Services and Fees Section with the Enter Amount to Be Paid Field Displayed

p. Enter the fee for the optional service in the **Enter amount to be paid** field.

q. Click 

.

The fee that you entered is displayed in the **Fee Total** column.

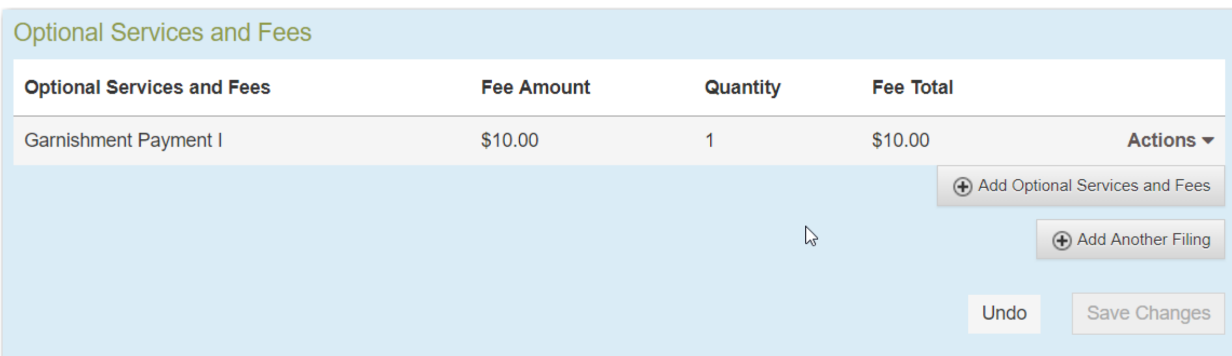


Figure 11.65 – Optional Services and Fees Section with the Fee Amount Displayed

r. Add more optional services if you want.

Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove an optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

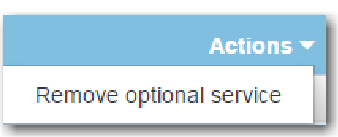
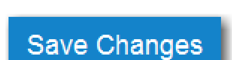


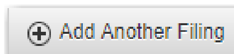
Figure 11.66 – Optional Service Actions Drop-Down List

s. When you are done adding optional services, click 

.

Figure 11.67 – Optional Services and Fees Section with Optional Services Saved

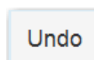
Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

t. If you want to add another filing to the case, click  .

The top of the **Filings** section is displayed, where you can begin another filing.

u. After you have added all of the filings to the case and saved the changes, verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

Note: If you forget to add your name to the service contact list, the system will automatically add it for you, if the system is configured to do so.

v. Click  to save your changes, or click  to cancel the action.

14. Complete the fields in the **Fees** section.

Note: Your credit card is authorized when submitted. However, the transaction fees are not posted to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.

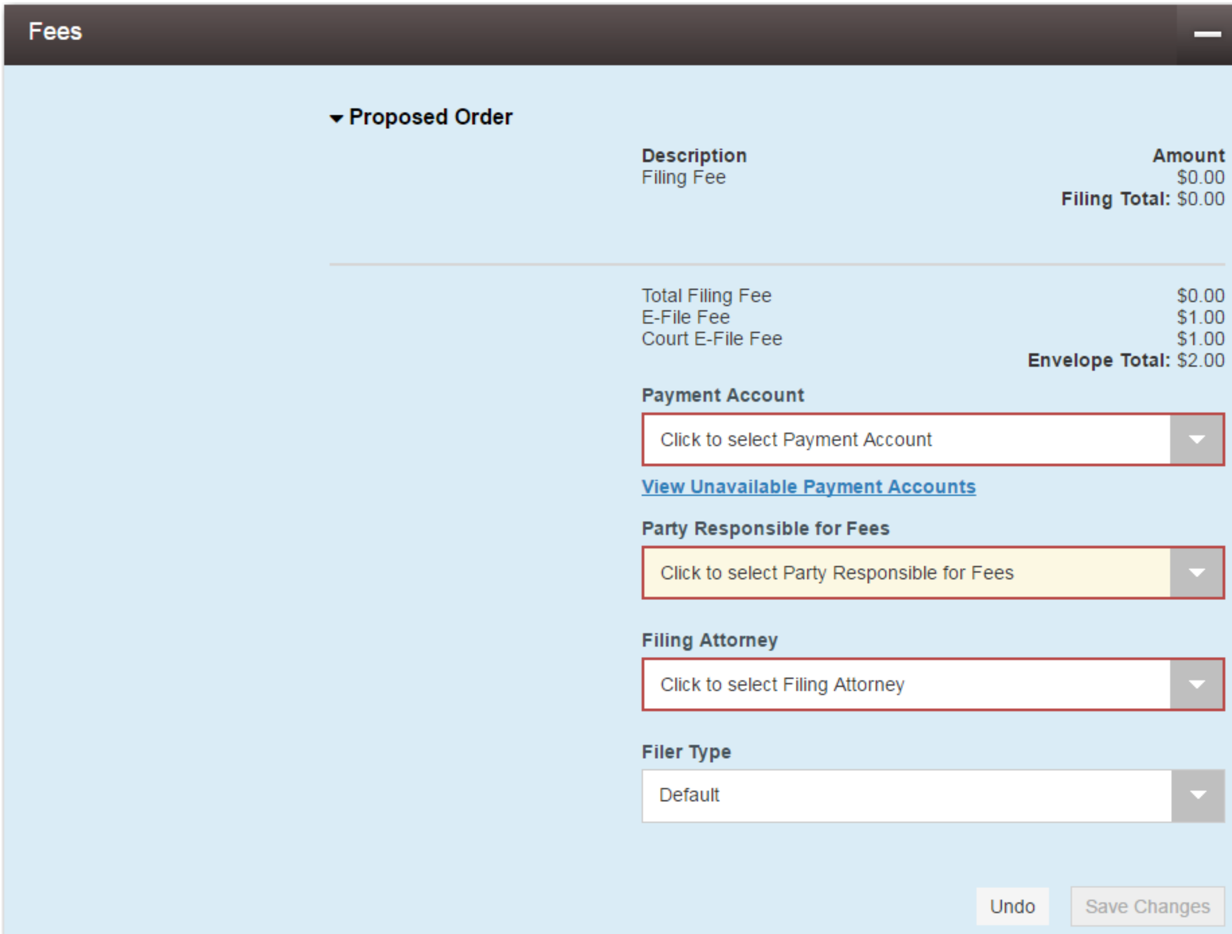


Figure 11.68 – Fees Section

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

   Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

b. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

c. Select the filing attorney from the **Filing Attorney** drop-down list.

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

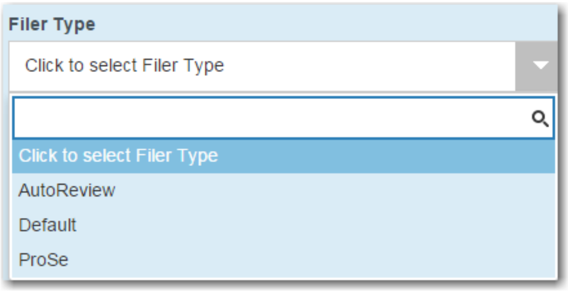


Figure 11.69 – Filer Type Drop-Down List

e. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.

15. After completing the fields in all of the sections on the page, perform one of the following actions:
    - Click **Save as Draft** to stop working on your filing and resume work at a later time.
    - Click **Summary** to review a summary of your filing.
16. If you clicked **Summary**, review the filing for accuracy. If you need to make any changes, click **Back** to return to the previous page. Make any necessary corrections, and then click **Summary** again.
17. When you are satisfied with the information in your filing, click **Submit**.

    A new envelope of your filing is included on the *Filing History* page.

Filing into an Existing Case with an Ad Damnum Amount

You can file into a case that was created with an Ad Damnum filing code.

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

To file into a case that was created with an Ad Damnum filing code, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **File into Existing Case**.

   Note: You can also click File into Existing Case on the Filer Dashboard in the New Filing section.

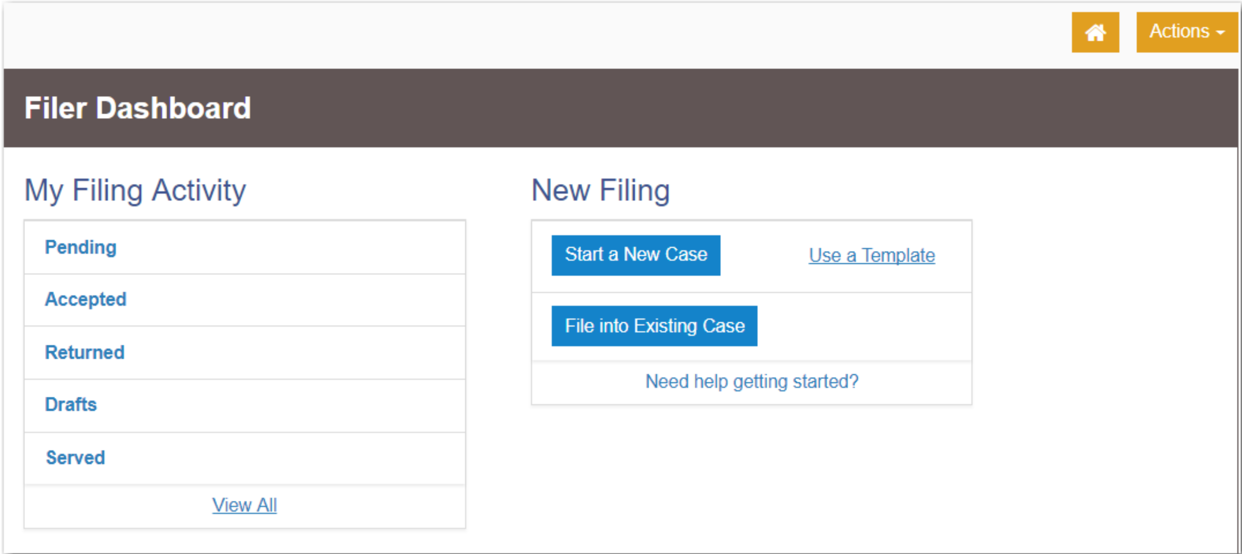


Figure 11.70 – Filer Dashboard Page

The *File Into Existing Case* page is displayed.

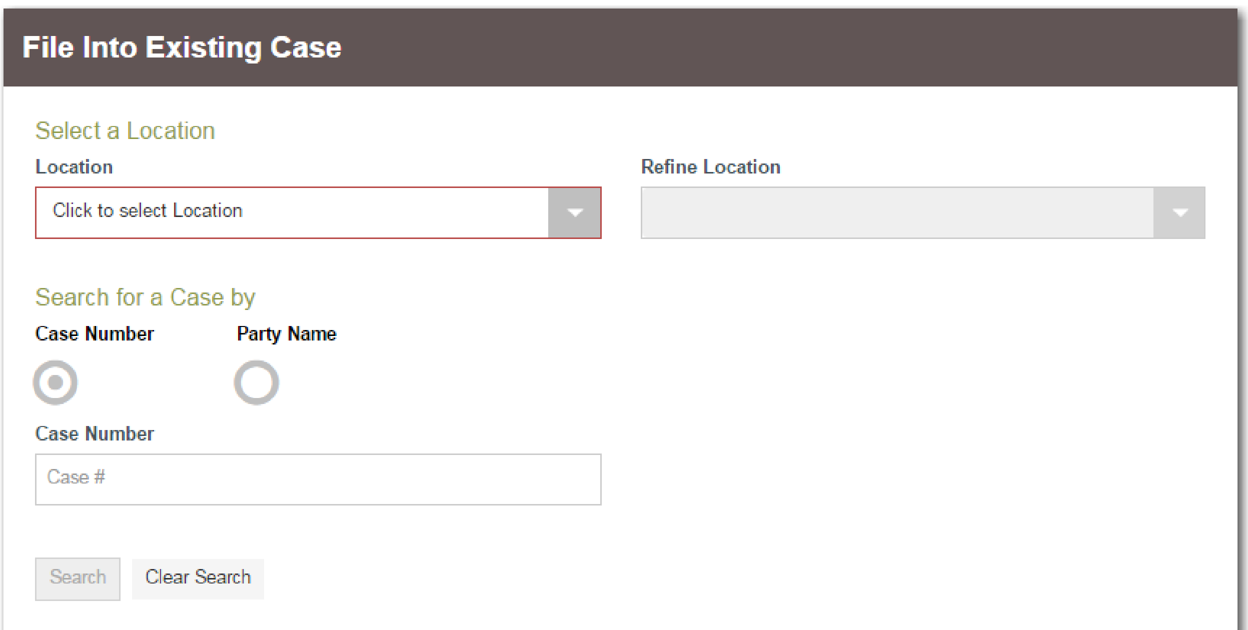
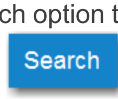


Figure 11.71 – File Into Existing Case Page

2. Select the location from the **Location** drop-down list.
3. Click the search option that you plan to use: **Case Number** or **Party Name**. Enter the search criteria, and then click 

.

   The *File Into Existing Case* window is displayed with the case that matches your search criteria.

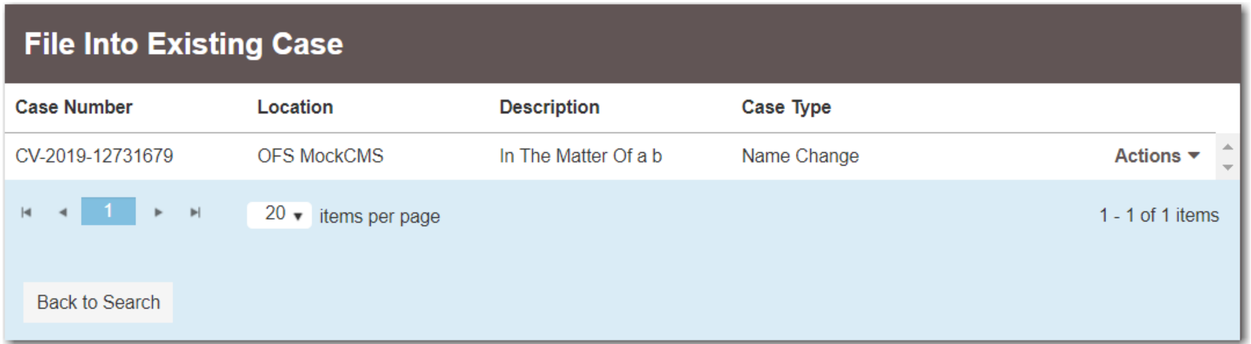


Figure 11.72 – Sample File Into Existing Case Window

4. From the **Actions** drop-down list, select **File Into Case**.

   The case filing is displayed. The **Case Information** and **Party Information** sections are already populated with the information that was used in the initial filing. The Ad Damnum amount that was entered in the initial filing is displayed in the **Case Information** section.

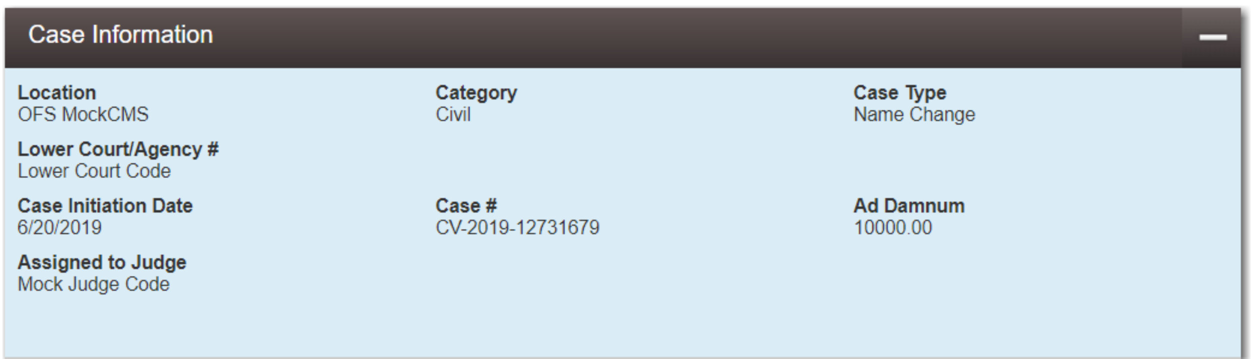


Figure 11.73 – Case Information Section

5. Enter the filing details for the case in the **Filings** section:

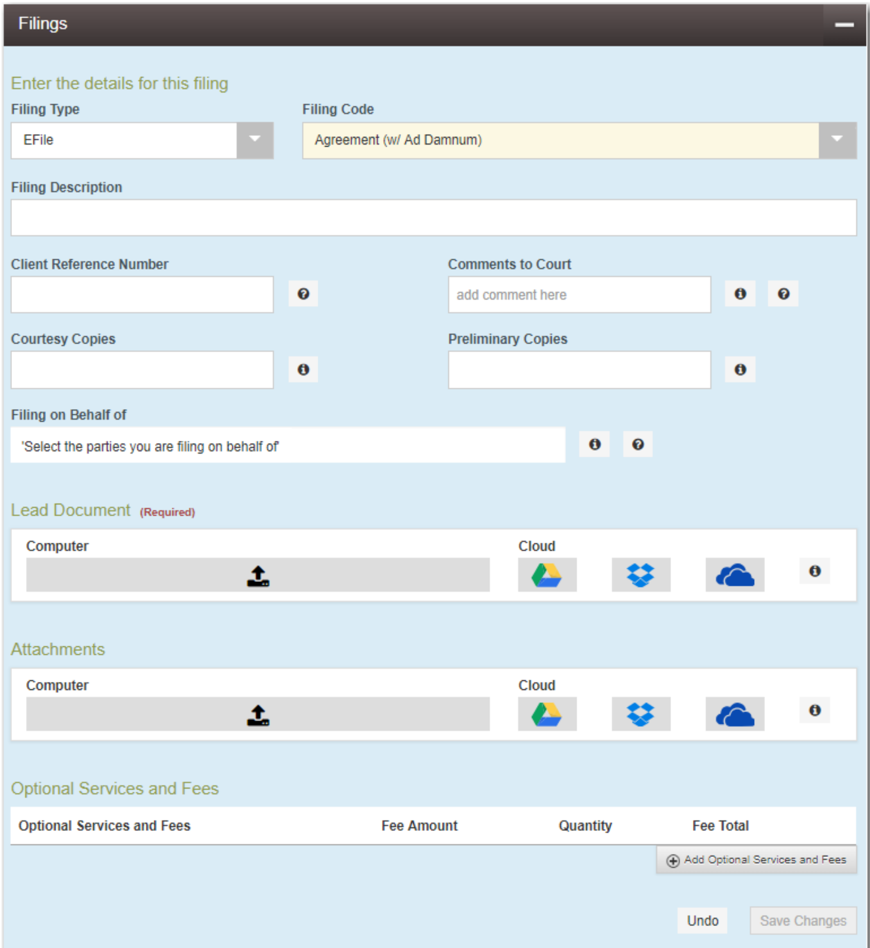


Figure 11.74 – Filings Section

a. Select a filing type from the **Filing Type** drop-down list.

b. Select the **Agreement (w/ Ad Damnum)** filing code from the **Filing Code** drop-down list.

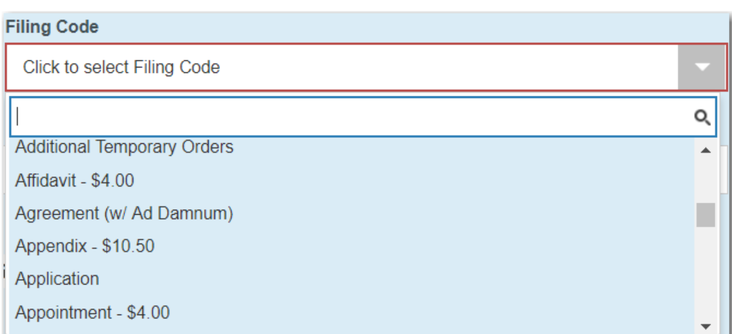


Figure 11.75 – The Agreement (w/ Ad Damnum) Option in the Filing Code Drop-Down List

c. Type a description of the filing in the **Filing Description** field.

d. Type a client reference number in the **Client Reference Number** field.

Note: A client reference number is a client-created number for internal purposes only. Most courts do not see or refer to the Client Reference Number field for the filing. This is an optional field.

e. Type any relevant comments in the **Comments to Court** field.

f. If you want to send courtesy copies of the filing to another party, type the recipient's email address in the **Courtesy Copies** field.

g. If you want to send preliminary copies of the filing to another party, type the recipient's email address in the **Preliminary Copies** field.

h. Click the **Filing on Behalf of** field to select the parties from the drop-down list.

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

i. Click the **Lead Document** field to select a lead document to upload. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

Note: The Lead Document field is required. You can upload only one document as a lead document.

j. Type a name for the lead document in the **Description** field.

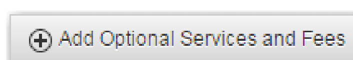
Note: A maximum length for the document name can be configured by Tyler at the client's request. When a maximum length is configured, if a user assigns a name to a document that exceeds the maximum character length, a warning message is displayed. If you see this type of warning message, you must assign a new name to the document before you can continue with the upload.

k. Select the level of security to attach to the document from the **Security** drop-down list.

l. If you have attachments to upload, click the **Attachments** field to select the documents to upload. If the attachments are stored in the cloud, click the icon for the cloud service provider where the attachments are stored.

Note: Not all court locations accept attachments. If your court does not accept attachments, create the lead document and attachment as one document, and then upload the document in the Lead Document field.

The **Optional Services and Fees** section is displayed.

m. If you want to add an optional service to the filing, click 

.

The **Optional Services and Fees** field is displayed.

n. Select the optional service that you want from the **Optional Services and Fees** drop-down list.

o. Add more optional services if you want.

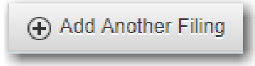
Note: If you try to add the same service twice, a warning message is displayed.

Note: If you want to remove the specified optional service before you save your changes, select Remove optional service from the Optional Service Actions drop-down list.

p. When you are done adding optional services, click 

.

Note: After you have added an optional service and saved the changes, you cannot edit that service. You must remove the service and then re-add it.

q. If you want to add another filing to the case, click 

.

The top of the **Filings** section is displayed, where you can begin another filing.

r. When you are done entering the filing details, click 

.

6. After you have added all of the filings to the case and saved the changes, verify that the service contacts are correct. If you want to add another service contact, select an option from the **Actions** drop-down list in the **Service Contacts** section.

7. Complete the fields in the **Fees** section:

   Note: The Ad Damnum amount that was entered in the initial filing is displayed in the Fees section.

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

      Note: If you enter incorrect payment information in the Payment Account field, you will receive an error message stating that the account information you entered is invalid. You must correct the payment information before you can continue with your filing.

   b. Select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.

   c. Select the filing attorney from the **Filing Attorney** drop-down list.

      Note: All users may not see the Filing Attorney field.

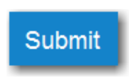
   d. Select the filer type from the **Filer Type** drop-down list.

8. After completing the required fields, click 

.

9. After completing the fields in all of the sections on the page, click 

to review a summary of your filing.

10. When you are satisfied with the information in your filing, click 

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    A new envelope of your filing is included on the *Filing History* page.

Creating a Service Only Filing

To create a Service Only filing, perform the following steps:

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 *Bookmarks* page, by clicking **File into Existing Case** in the **New Filing** section on the *Filer Dashboard* page, or from the **Actions** drop-down list on the *Filer Dashboard* page).

   Note: The Case Information and Party Information fields are already populated since this is an existing case.

3. Navigate to the **Filings** section. Select **Serve** in the **Filing Type** field.

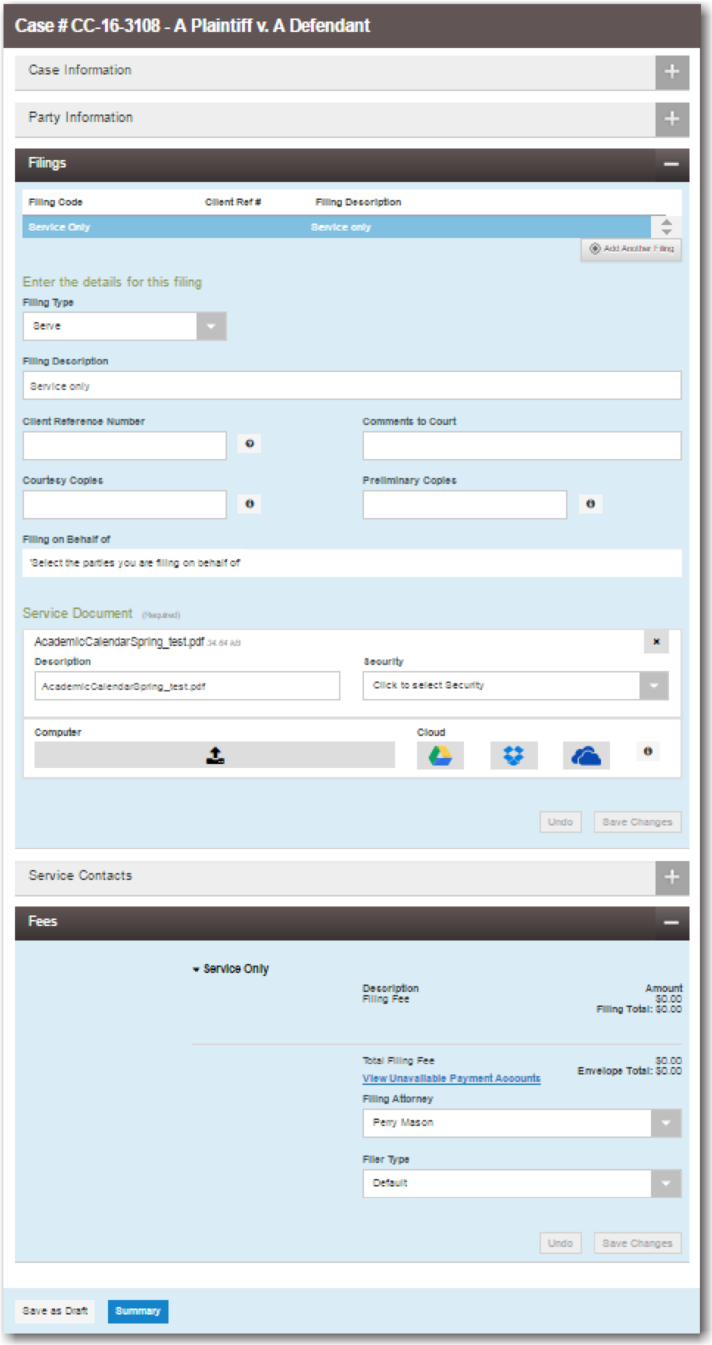


Figure 11.76 – Case Page

4. Click the **Service Document** field to select a service document to upload. If your document is stored in the cloud, click the icon for the cloud service provider where the document is stored.

   Note: Cloud services are configured by Tyler and may not be available on your system. If your system is configured for cloud services, you can upload documents from the following cloud storage providers: Google Drive™ online storage service, Dropbox®, and Microsoft® OneDrive®.

   Note: The Service Document field is required.

5. Click Save Changes .
6. Add the service contacts that you want to receive a Service Only filing in the **Service Contacts** section.
7. If applicable, select the payment account from the **Payment Account** drop-down list.
8. If applicable, select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.
9. Select the filing attorney from the **Filing Attorney** drop-down list.
10. Select the filer type from the **Filer Type** drop-down list.
11. Select the check box for the appropriate submission agreement in the **Submission Agreements** section.

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

12. Click Save as Draft to stop working on your filing and resume work at a later time, or click Summary to review a summary of your filing.

Filing an Appeal to an Existing Case

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

Perform the following steps to file an appeal to an existing case using the Appellate option:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

   The *Start a New Case* page is displayed.
2. Complete the details for the appeal by using the drop-down lists in the required fields in the **Case Information** section:

   Note: A red box around a field indicates that it is required.

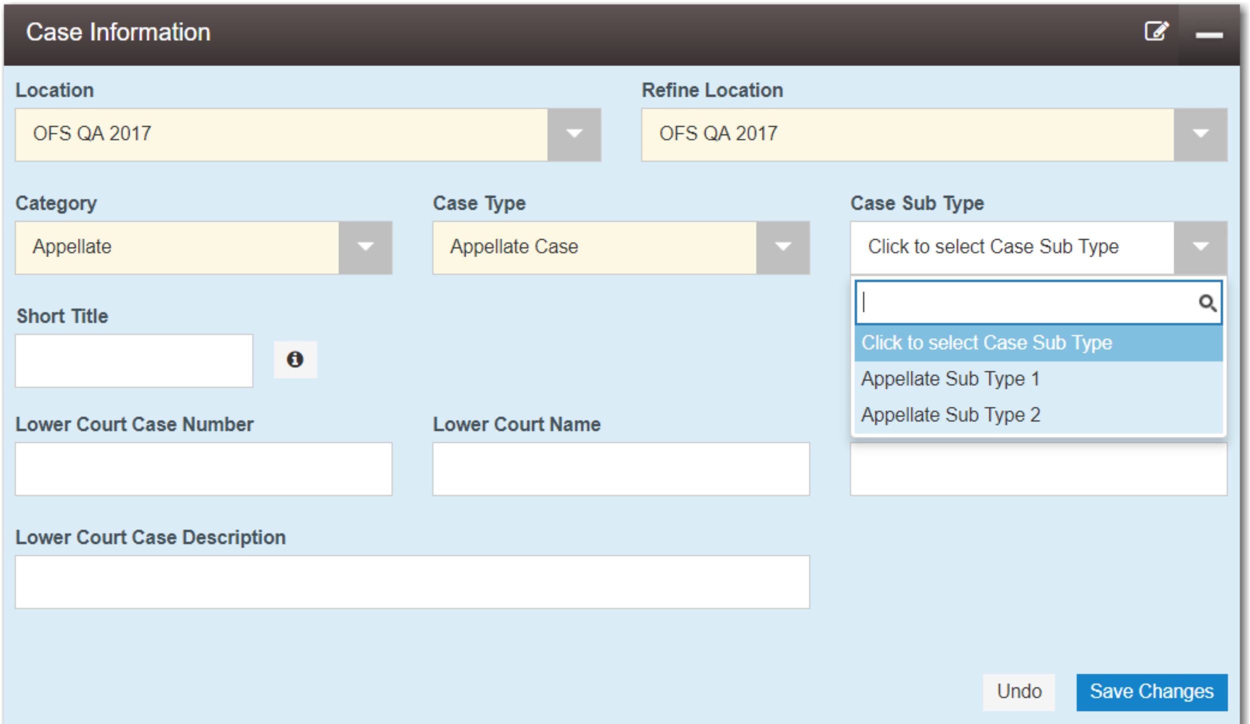


Figure 11.77 – Appellate Selections in the Case Information Section

a. Select your court location from the **Location** drop-down list.

   Note: The court location is generally the county or district court where you will be doing the filing.

b. Select the specific court from the **Refine Location** drop-down list.

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

   Note: The items in this list are limited to only the courts in the county or district that you previously selected.

c. Select **Appellate** from the **Category** drop-down list.

d. Select **Appellate Case** from the **Case Type** drop-down list.

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

f. Type the original case number in the **Lower Court Case Number** field.

g. Type the name of the lower court in the **Lower Court Name** field.

h. Type the name of the lower court case judge in the **Lower Court Case Judge** field.

i. Type a description of the original case in the **Lower Court Case Description** field.

3. After completing the required fields, click 

.

Note: If you decide to save the draft, you can stop working on the filing and resume work at a later time. To resume filing a saved draft, navigate to the *Filing History* page. From the Actions drop-down list for the specified draft, select Resume Draft Envelope to continue with your filing.

12 Service Contacts

Topics covered in this chapter

You can view the current service contacts and add service contacts to your firm.

Adding Service Contacts to the Firm

You can add service contacts to the list of contacts associated with your firm.

To add a service contact to your firm, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, click **Firm Service Contacts**.

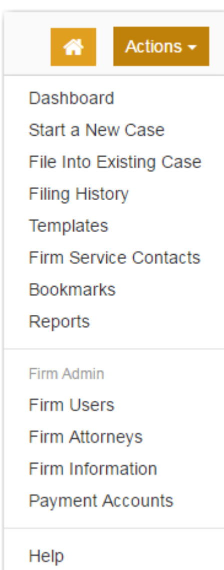


Figure 12.1 – Actions Drop-Down List

The *Firm Service Contacts* page is displayed.

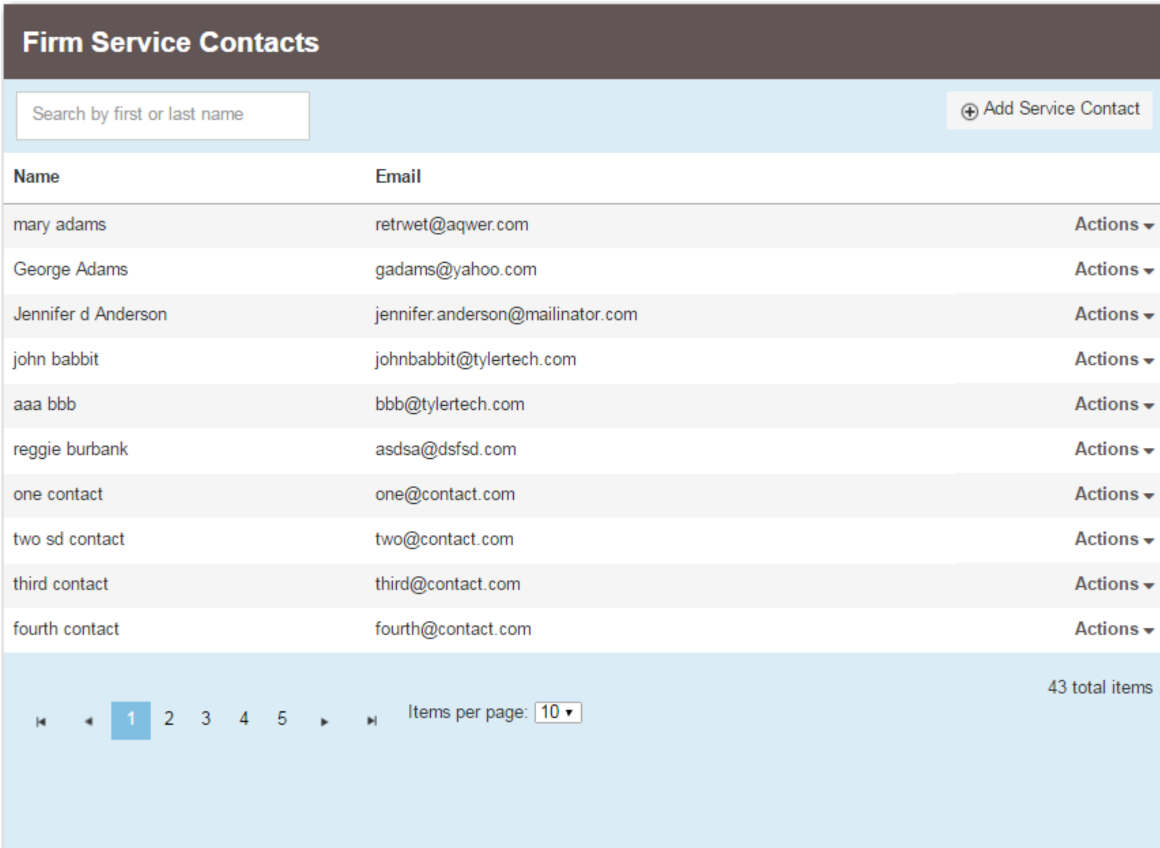
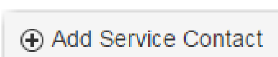


Figure 12.2 – Firm Service Contacts Page

2. Click 

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   The *Firm Service Contacts* page for adding a new contact is displayed.

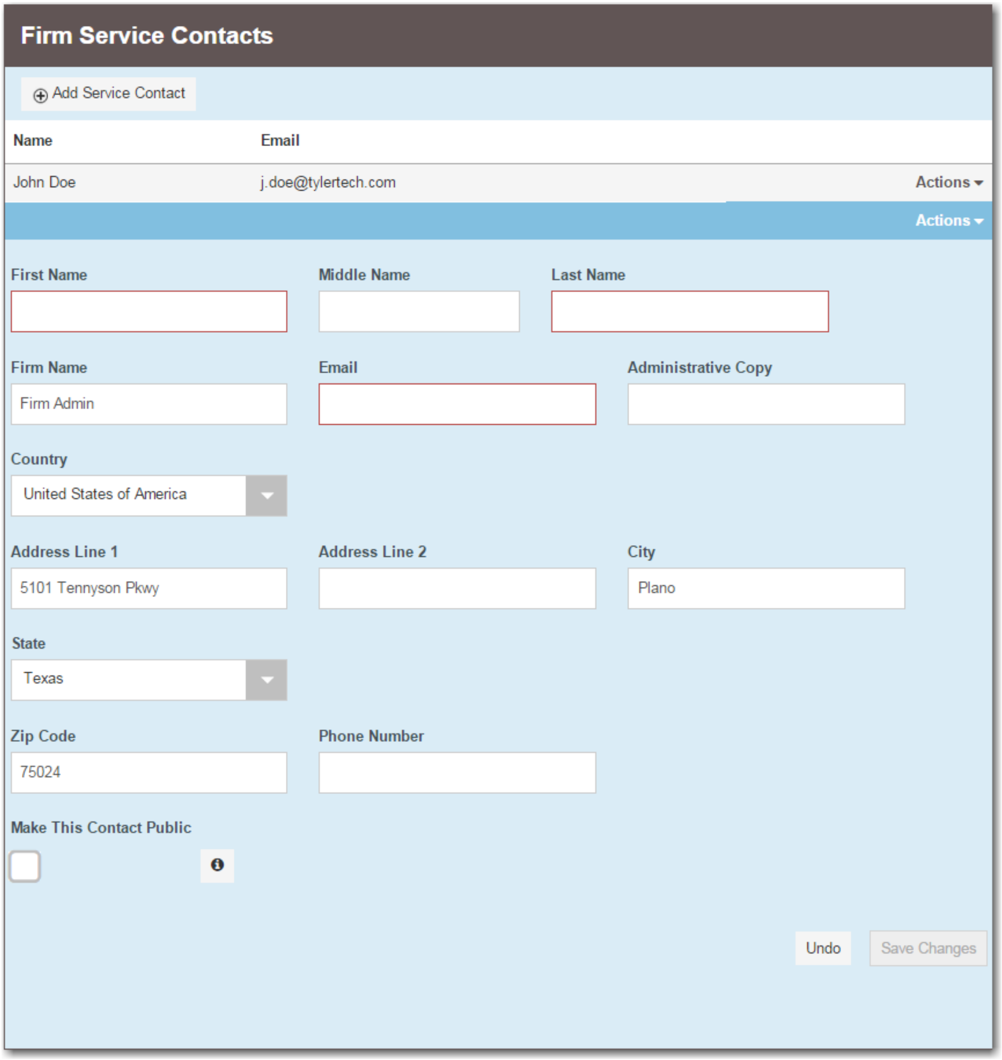


Figure 12.3 – Firm Service Contacts Page for Adding a New Contact

3. Complete the required fields to add the new service contact: **First Name**, **Last Name**, and **Email**.
4. If you want to make the contact available to any filer, select the **Make This Contact Public** check box.
5. Click Save Changes to save the contact, or click Undo to cancel the action.

   If you click Save Changes, the new contact information is displayed in the **Firm Service Contacts** list.

Adding Service Contacts to a Case

To add a service contact to a case, perform the following steps:

1. From the *Filing History* page, locate the case to which you want to add a service contact. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

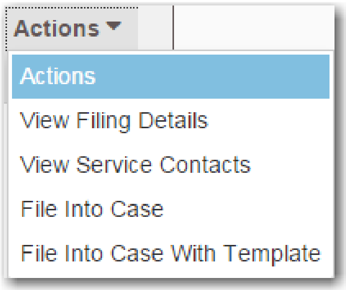


Figure 12.4 – Actions Drop-Down List

The *Service Contacts* page is displayed.

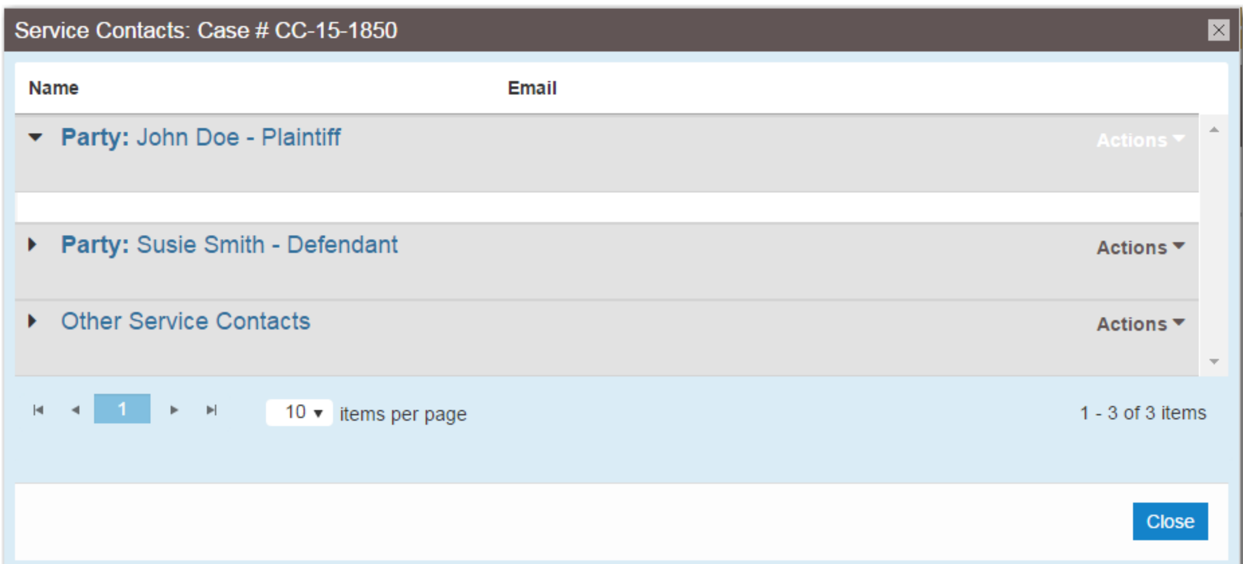


Figure 12.5 – Service Contacts Page

2. Locate the party to which you want to add a service contact. From the **Actions** drop-down list for the specified party, select **Add From Firm Service Contacts**.

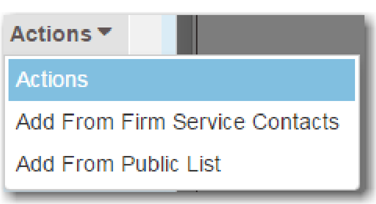


Figure 12.6 – Service Contacts Actions Drop-Down List

The *Add From Firm Service Contacts* dialog box is displayed.

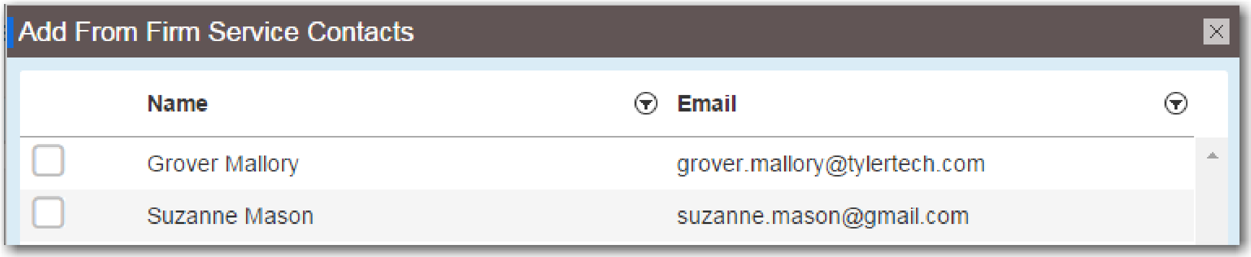


Figure 12.7 – Add From Firm Service Contacts Dialog Box

3. Select the check box next to the service contacts that you want to add to the case.
4. After selecting the new service contacts, click Close.

   The new service contacts are now displayed on the *Service Contacts* page under the party to which the service contact has been added.
5. Click Close to return to the *Filing History* page.

Adding a Mail-Only Service Contact

Some service contacts in a case filing are configured for notification by only U.S. mail.

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

Note: Service contacts that are created through the use of the Add New Mail Service Contact option cannot be changed to add an email address at a later time.

To add a mail-only service contact:

1. Complete the required information in the **Case Information**, **Party Information**, and **Filings** sections.
2. In the **Service Contacts** section, select the party for which you want to add a service contact.

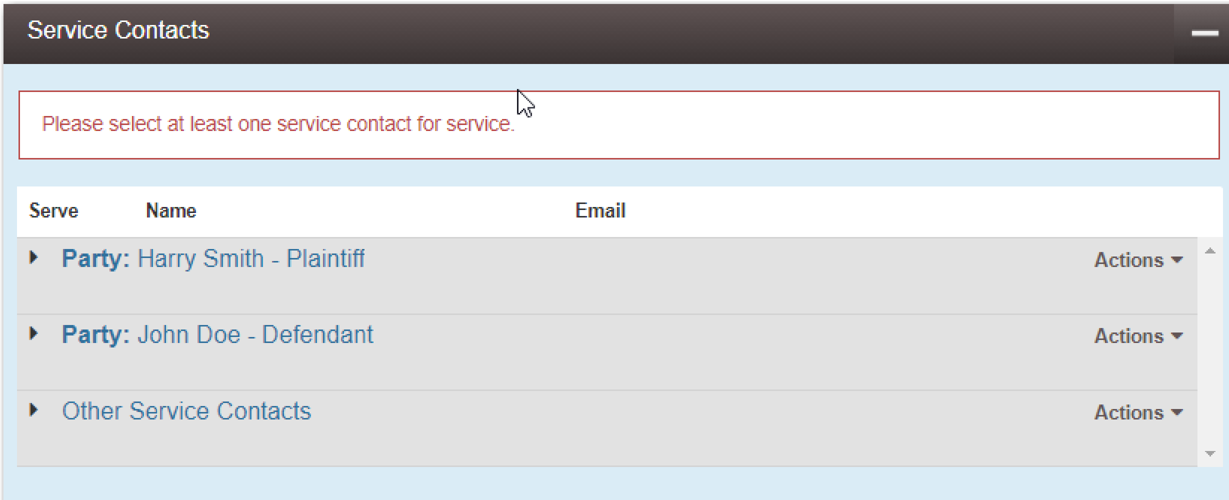


Figure 12.8 – Service Contacts Section

3. . From the **Actions** drop-down list for the specified party, click **Add New Mail Service Contact**.

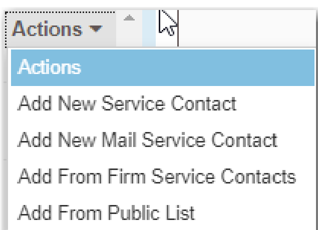


Figure 12.9 – Actions Drop-Down List

The **Service Contacts** section expands to display additional fields.

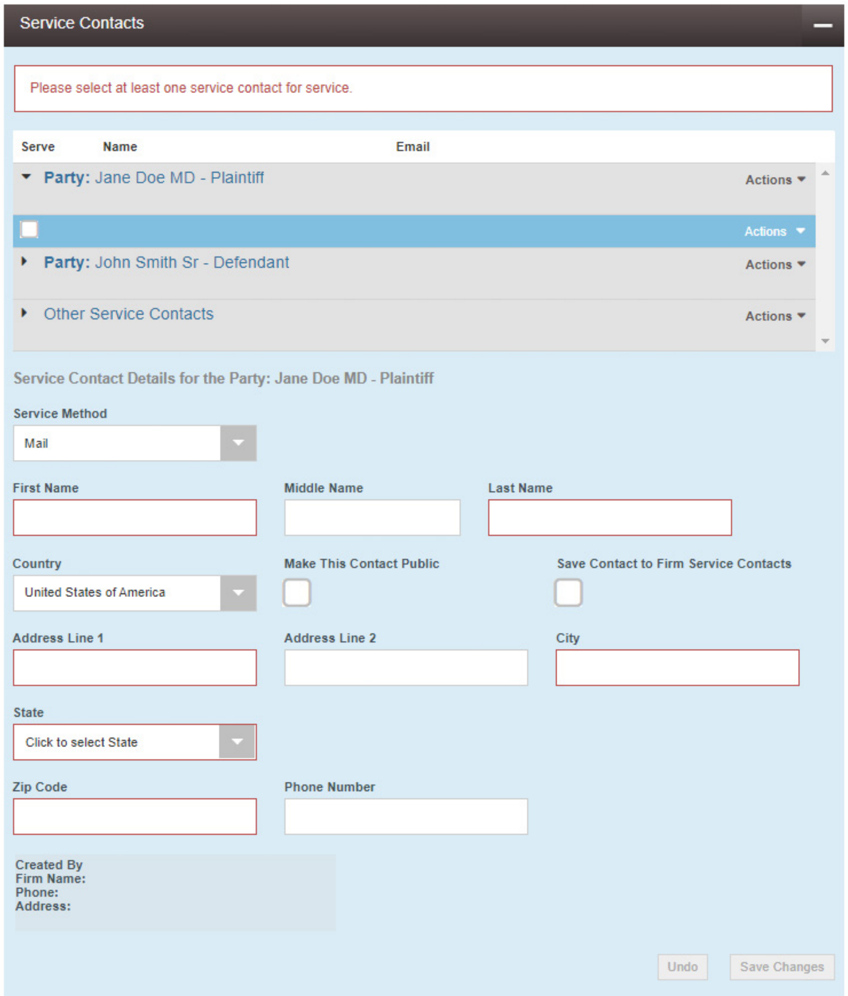


Figure 12.10 – Service Contacts Section for Adding a New Contact

4. Complete the required fields with the name and address information for the new service contact.

   Note: The required fields are indicated with a red border. You must provide a mailing address for the service contact.

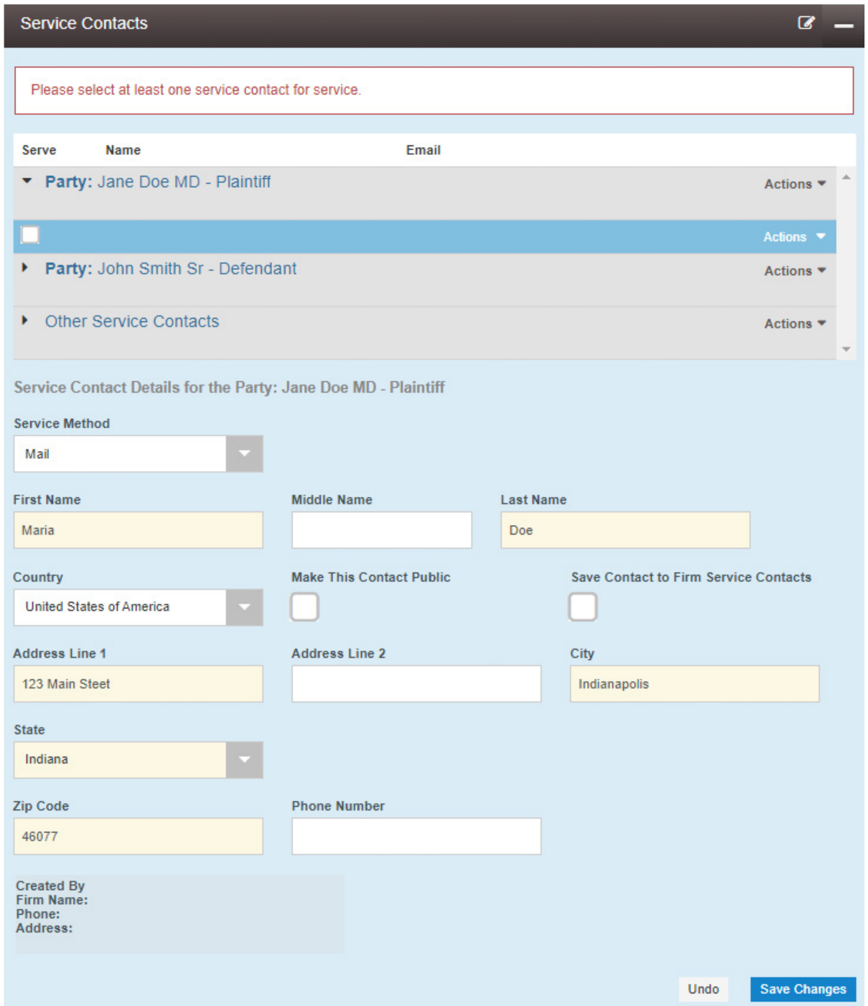
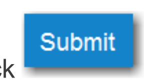


Figure 12.11 – Example of a New Mail Service Contact

5. Complete the remaining required fields for your case filing, and then click 

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Replacing a Firm Service Contact

To replace a service contact, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Firm Service Contacts**.

   The *Firm Service Contacts* page is displayed.

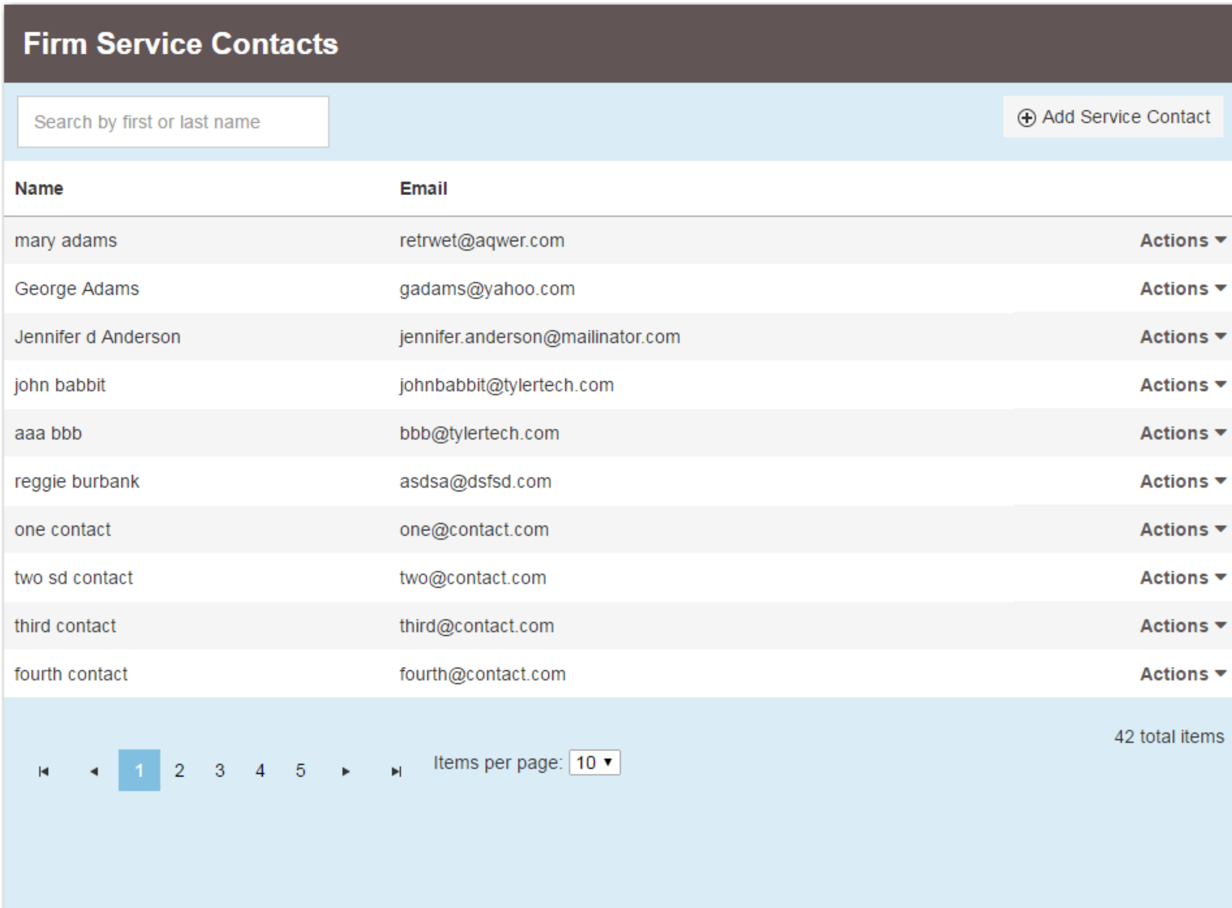

Figure 12.12 – Firm Service Contacts Page

2. Locate the service contact that you want to replace.
3. From the **Actions** drop-down list for the specified service contact, select **Replace Contact**.

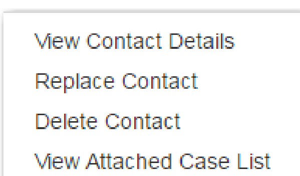

Figure 12.13 – Service Contacts Actions Drop-Down List

The *Replace Service Contact* dialog box is displayed.

Note: A warning message is displayed, which indicates the number of cases to which the service contact is attached. The warning message also reminds you that replacing a service contact cannot be undone.

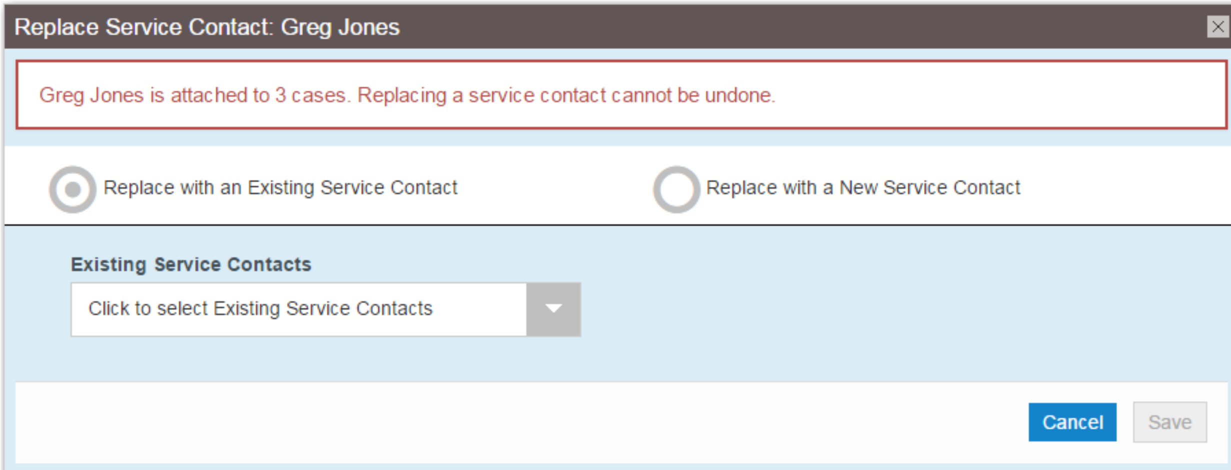

Figure 12.14 – Replace Service Contact Dialog Box

4. If you want to continue to replace the specified service contact, select one of the following methods to replace the service contact.
    - To replace the service contact with an existing contact, select the **Replace with an Existing Service Contact** option. Then select a replacement service contact from the **Existing Service Contacts** drop-down list. Click Save.

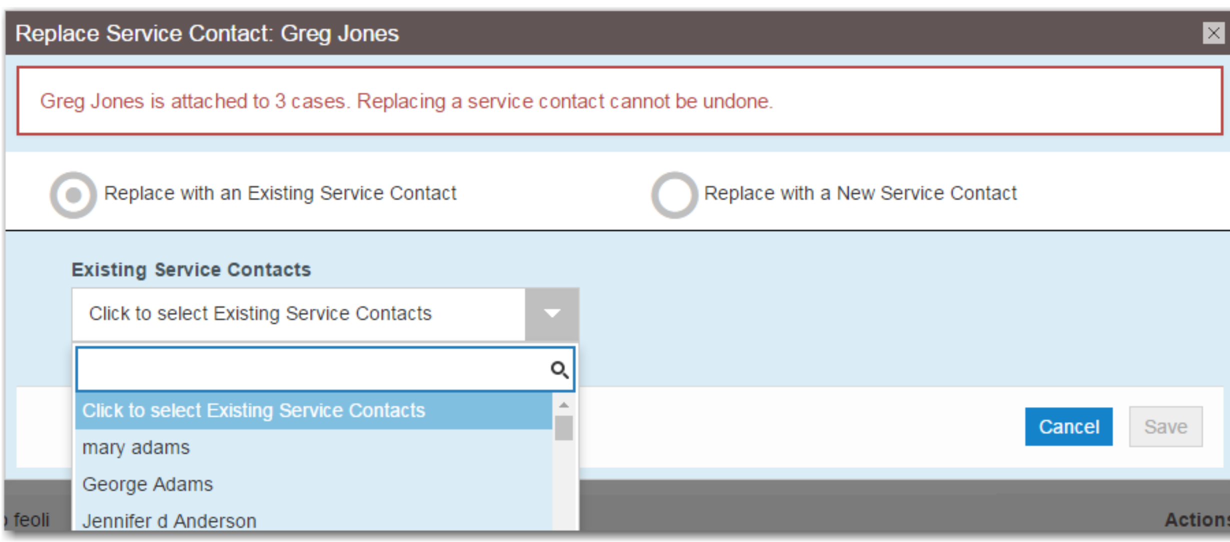

Figure 12.15 – Replace Service Contact Dialog Box with Existing Service Contacts Drop-Down List

    - To replace the service contact with a new contact, select the **Replace with a New Service Contact** option. The dialog box expands with fields to complete for the new contact. Complete the fields, and click Save Changes.

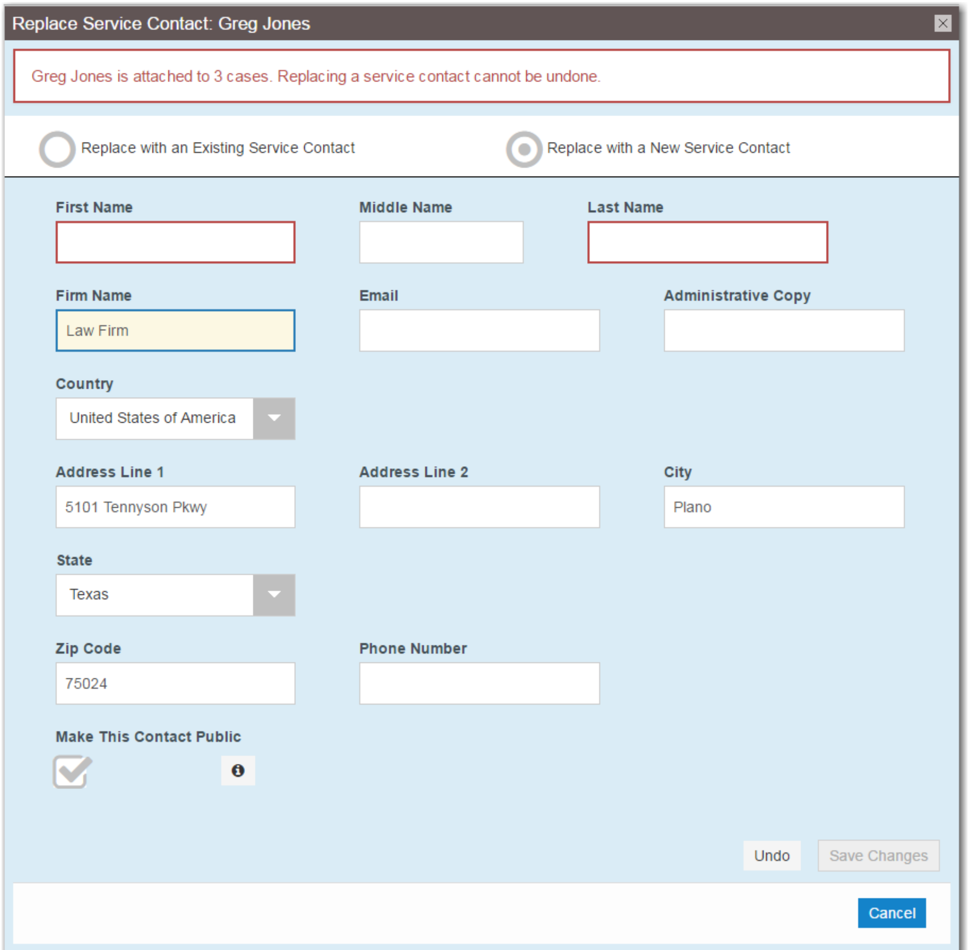

Figure 12.16 – Replace Service Contact Dialog Box for Adding New Service Contact

Note: You can make the service contact a public contact by selecting the Make This Contact Public check box.

Default State of Service Contacts

During filing creation, the system default is for all service contacts to be selected for Service Only and EFileAndServe filings. You can deselect the service contacts that are not needed for that filing. This feature shortens your filing time, especially if you have dozens of service contacts associated with a case.

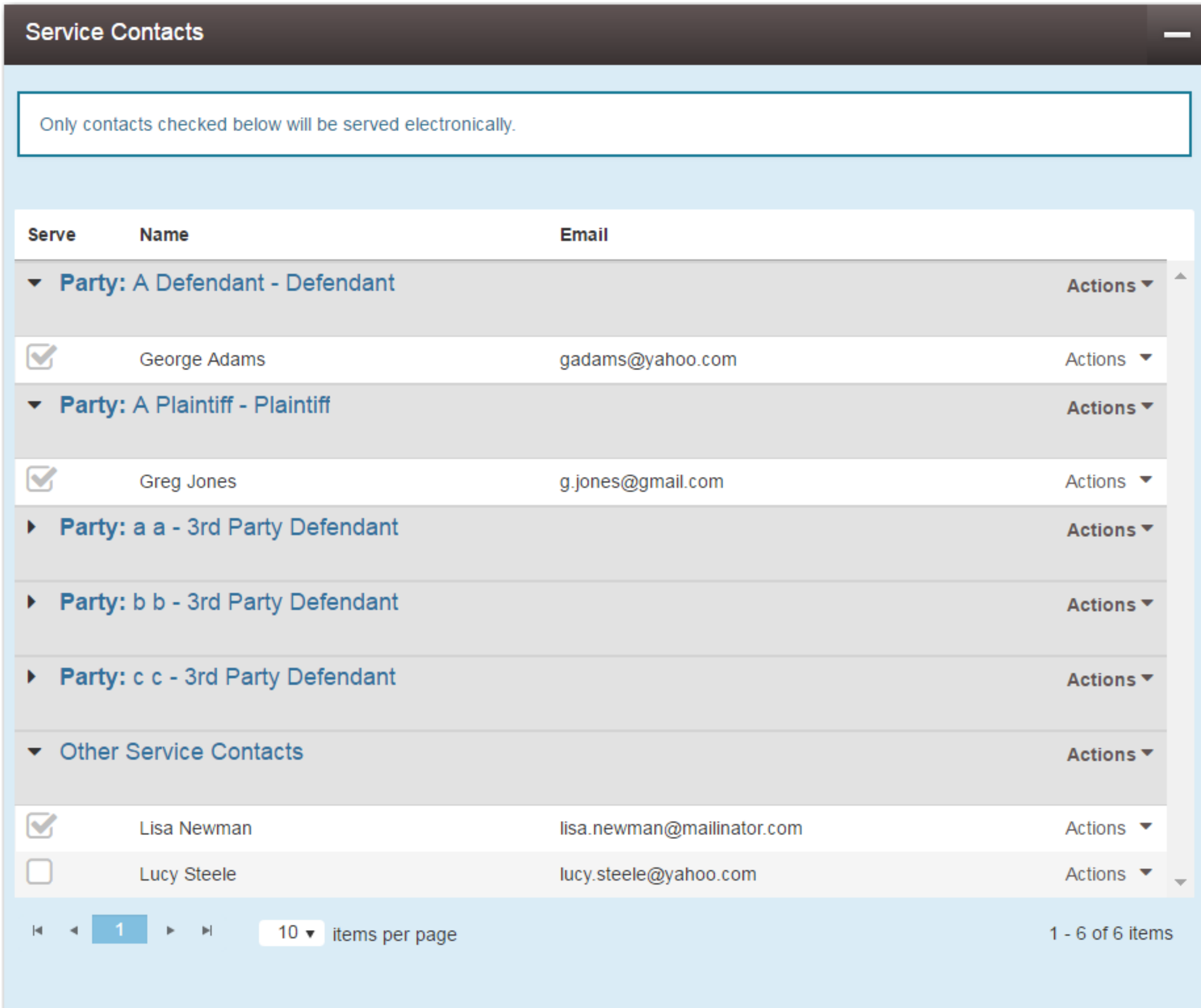

Figure 12.17 – Service Contacts Selected by Default (With One Contact Deselected)

Public Service Contacts

When a service contact is created and associated with a case, it can be designated as a public service contact. When specified as public, the service contact can then be used by anyone outside your firm.

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

In addition, you can add service contacts from a public list to a case that you are starting or filing into.

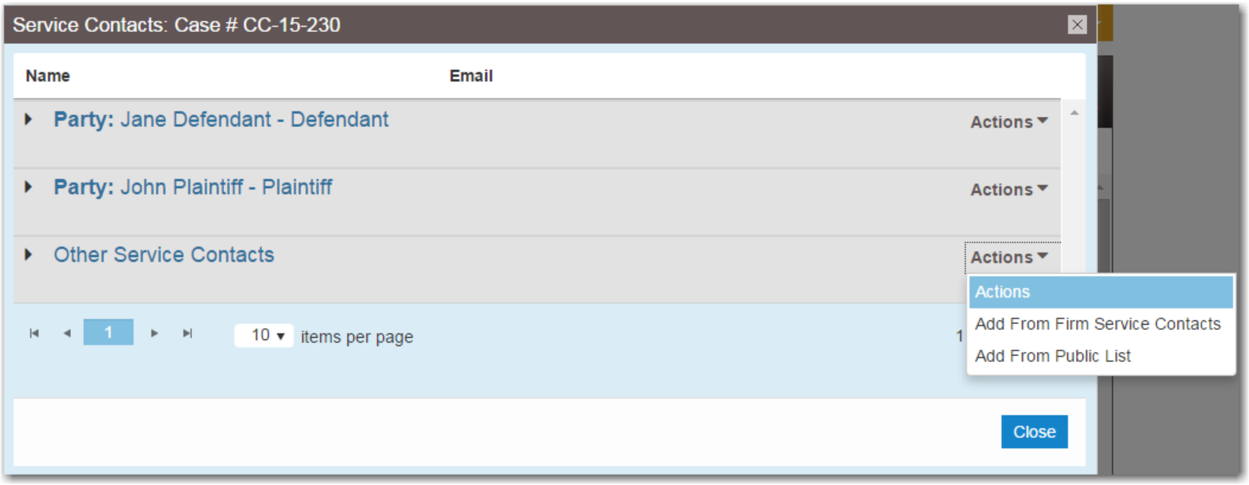

Figure 12.18 – Service Contacts Page

Adding Firm Service Contacts from a Public List

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

To add a firm service contact from a public list, perform the following steps:

1. From the *Filing History* page, locate the case to which you want to add a public service contact. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

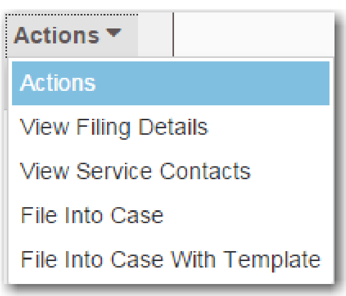

Figure 12.19 – Actions Drop-Down List

The *Service Contacts* page for the specified case is displayed.

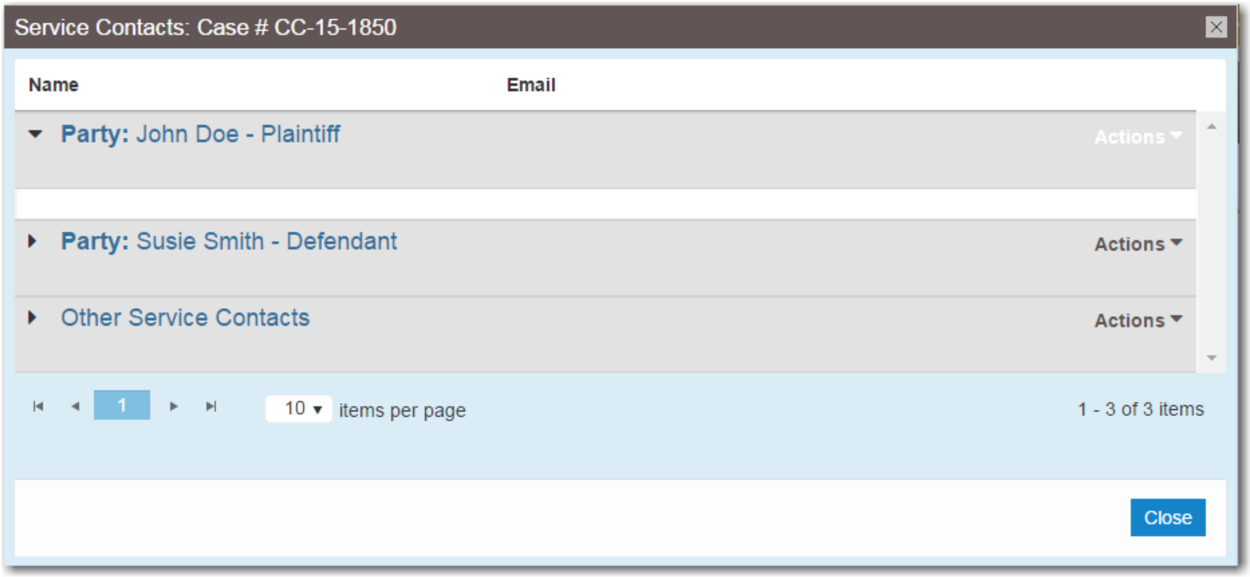

Figure 12.20 – Service Contacts Page

2. Locate the party to which you want to add a public service contact. From the **Actions** drop-down list for the specified party, select **Add From Public List**.

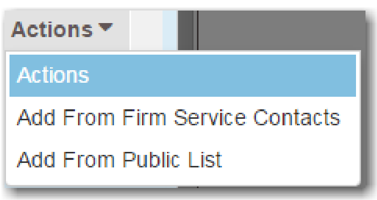

Figure 12.21 – Service Contacts Actions Drop-Down List

The *Add Service Contact from Public List* dialog box is displayed.

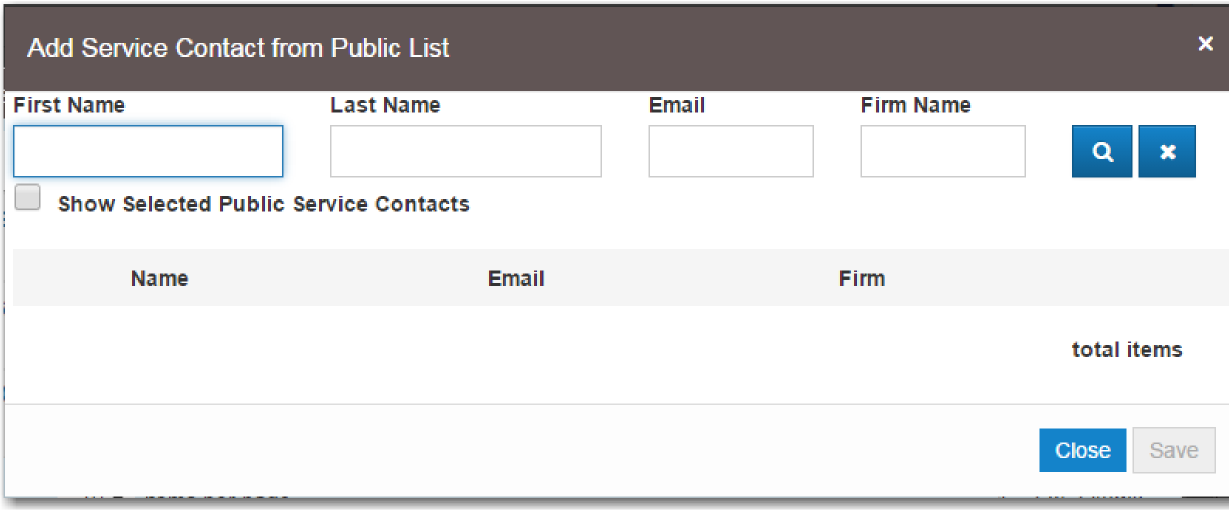

Figure 12.22 – Add Service Contact from Public List Dialog Box

3. Type the name of the service contact, or select the **Show Selected Public Service Contacts** check box to view the possible choices.

   The *Add Service Contact from Public List* page is displayed.

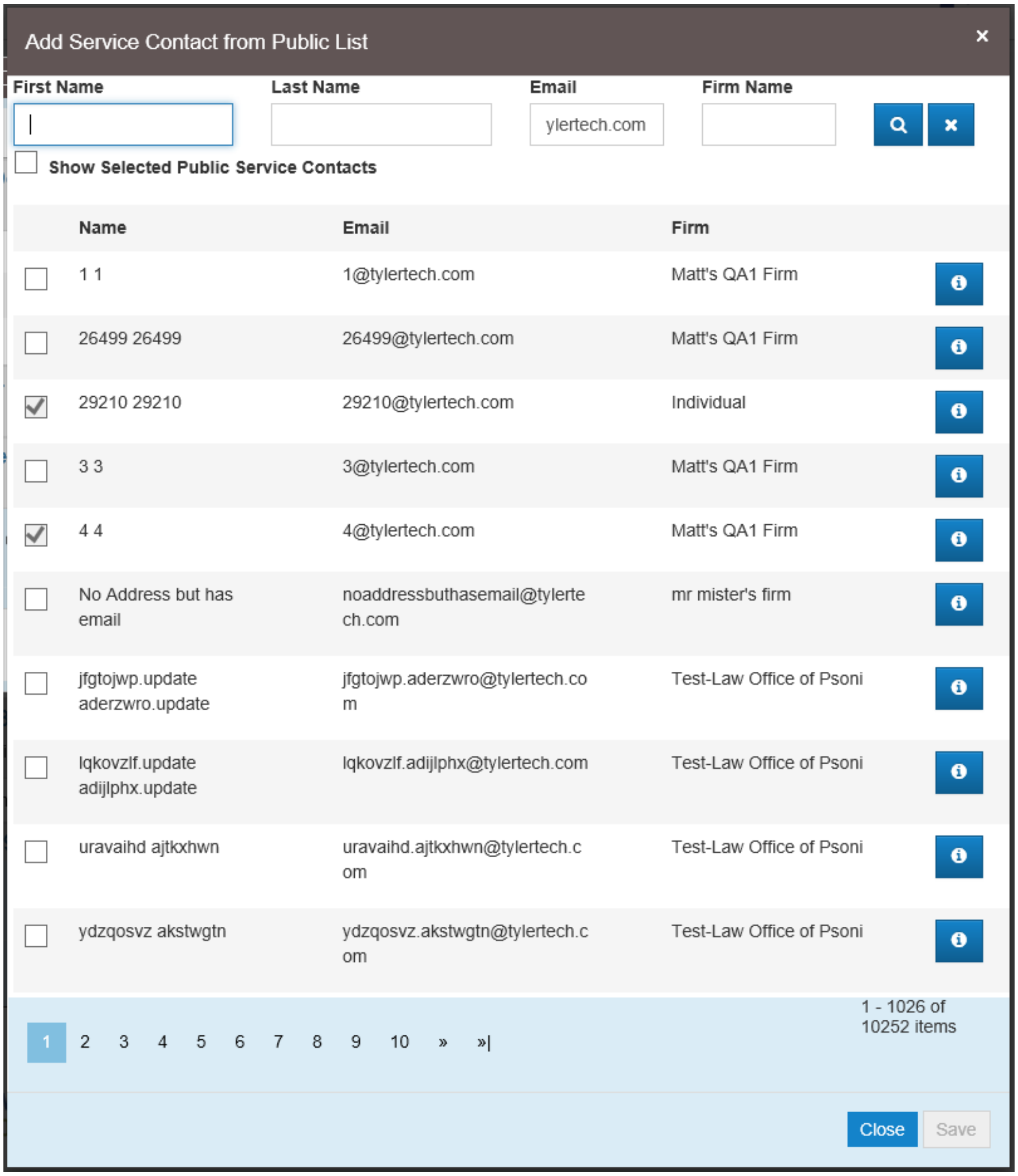

Figure 12.23 – Add Service Contact from Public List Page

4. Click the names of the public service contacts that you want to add to the case.

5. After selecting the public service contacts, click 

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   The public service contacts are now displayed on the *Service Contacts* page under the party to which the public service contact has been added.

6. Click 

to return to the *Filing History* page.

Create New Service Contacts During a Filing

You can add service contacts while filing a case without first adding the service contacts to the Firm Service Contacts list.

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

Service contacts can be created from the following locations:

- The *Filing History* page
- When selecting **File Into Existing Case** from the *Filer Dashboard* page or the **Actions** drop-down list (i.e., performing a case search)
- When creating a new filing (in the **Service Contacts** section)

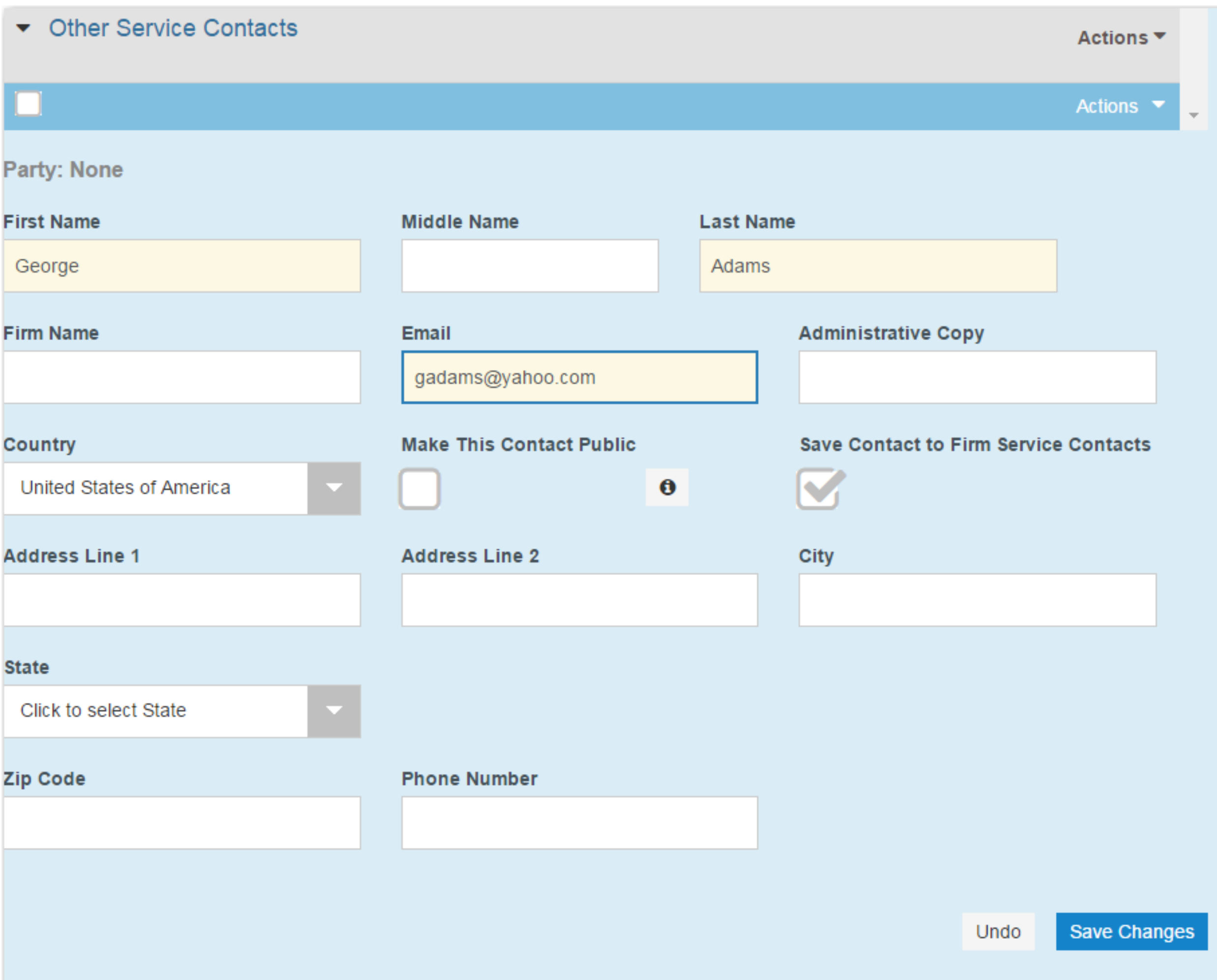


Figure 12.24 – Other Service Contacts Section (with New Contact Added)

After you add the new service contact, it is added to the *Firm Service Contacts* page.

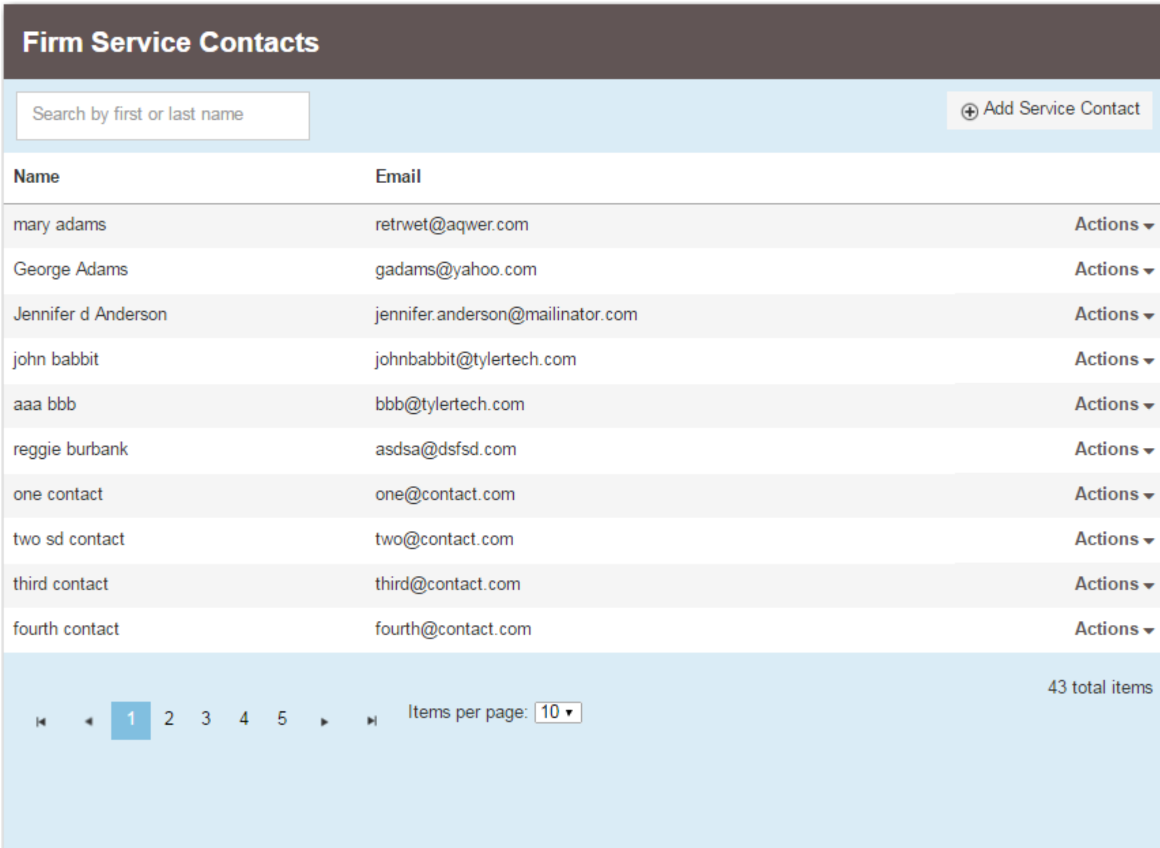


Figure 12.25 – Firm Service Contacts Page

Creating Firm Service Contacts from the Filing History Page

You can add service contacts to the Firm Service Contacts list for an existing case from the *Filing History* page.

To create a service contact from the *Filing History* page, perform the following steps:

1. From the **Actions** drop-down list, select **Filing History**.

   The *Filing History* page is displayed.

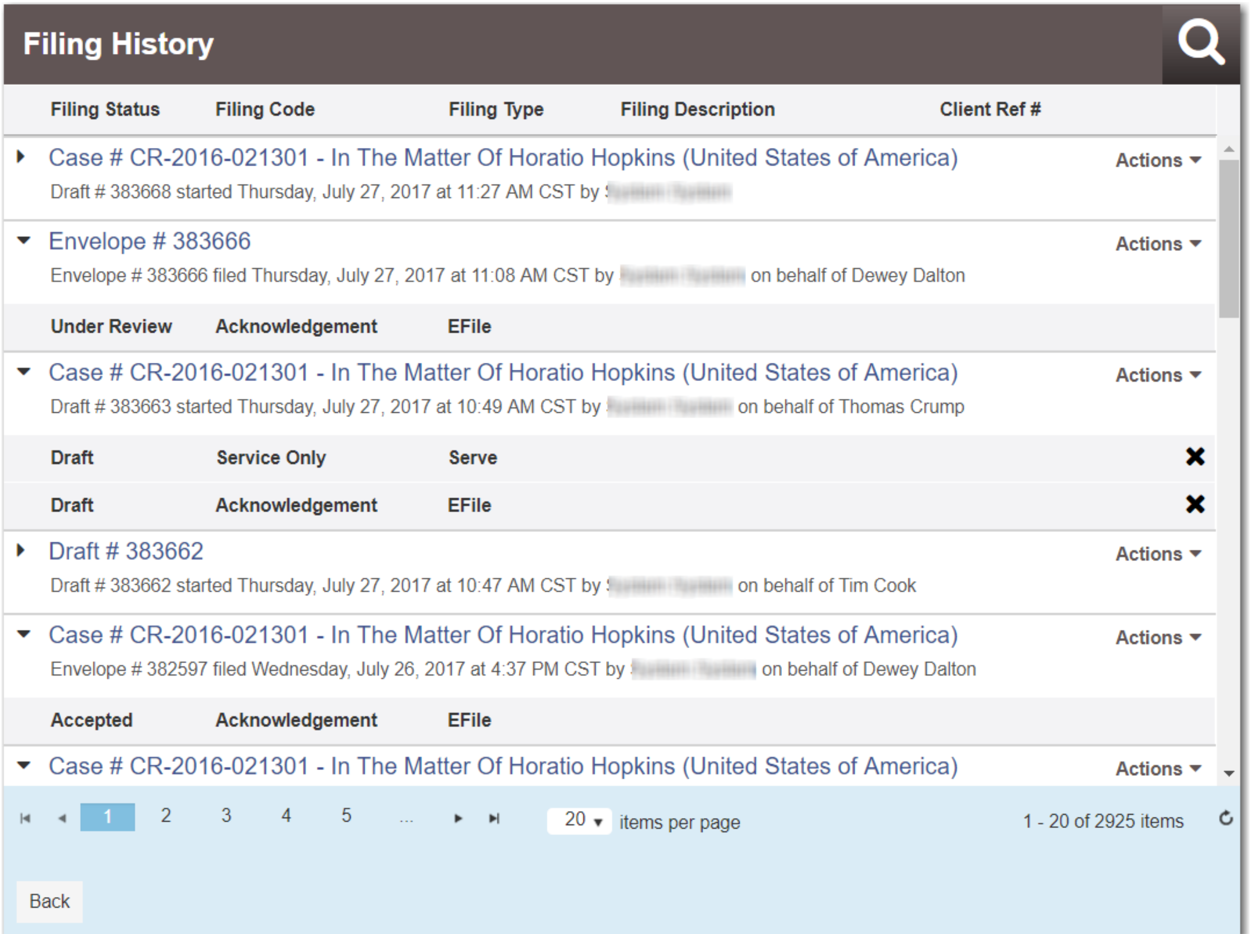


Figure 12.26 – Filing History Page

2. Locate a case for which you want to add a service contact. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

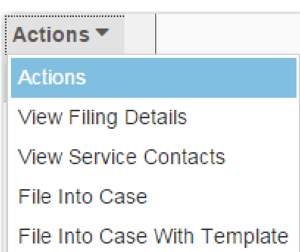


Figure 12.27 – Actions Drop-Down List

The *Service Contacts* page for the specified case is displayed.

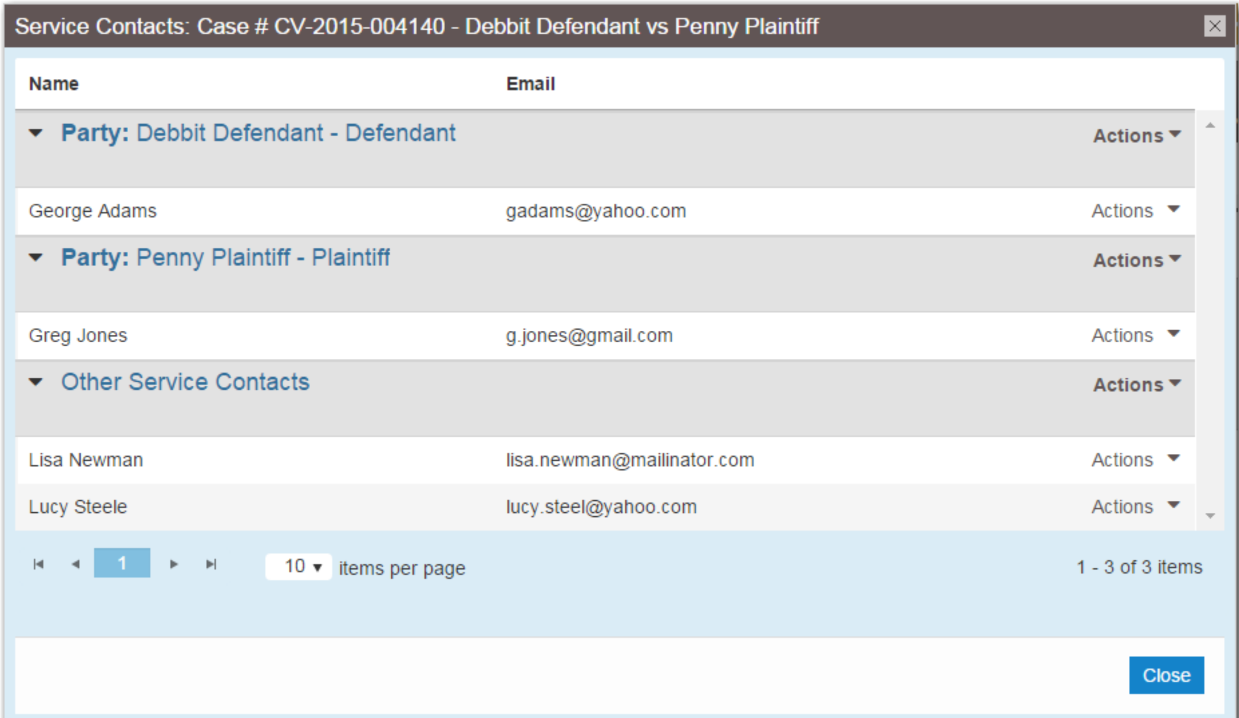


Figure 12.28 – Service Contacts Page

3. From the **Actions** drop-down list for the specified party, select **Add New Service Contact**.

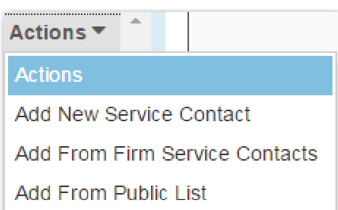


Figure 12.29 – Service Contacts Actions Drop-Down List

Note: You can also add new service contacts to the case in the Other Service Contacts section.

The page expands with new fields to complete for the new service contact.

4. Complete the required information for the new contact, and select the **Save Contact to Firm Service Contacts** check box to add the contact to the Firm Service Contacts list.

Figure 12.30 – Save Contact to Firm Service Contacts Check Box

Creating Firm Service Contacts During a Case Search (File Into Existing Case)

To create a firm service contact during a case search, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **File Into Existing Case**.

   Note: You can also click File into Existing Case on the Filer Dashboard in the New Filing section.

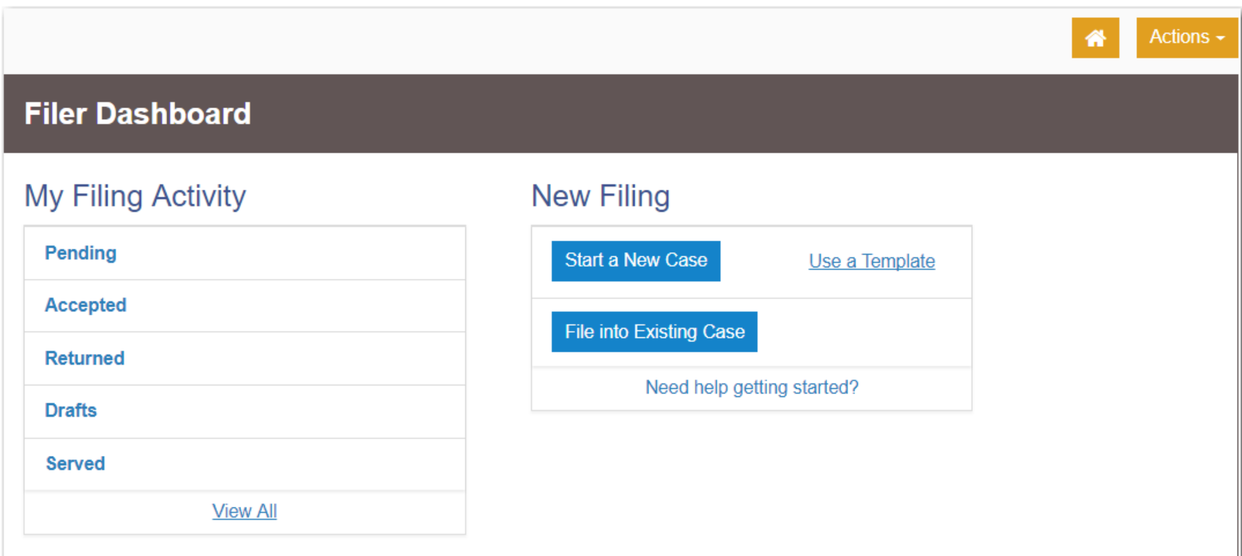


Figure 12.31 – Filer Dashboard Page

   The *File Into Existing Case* page is displayed.

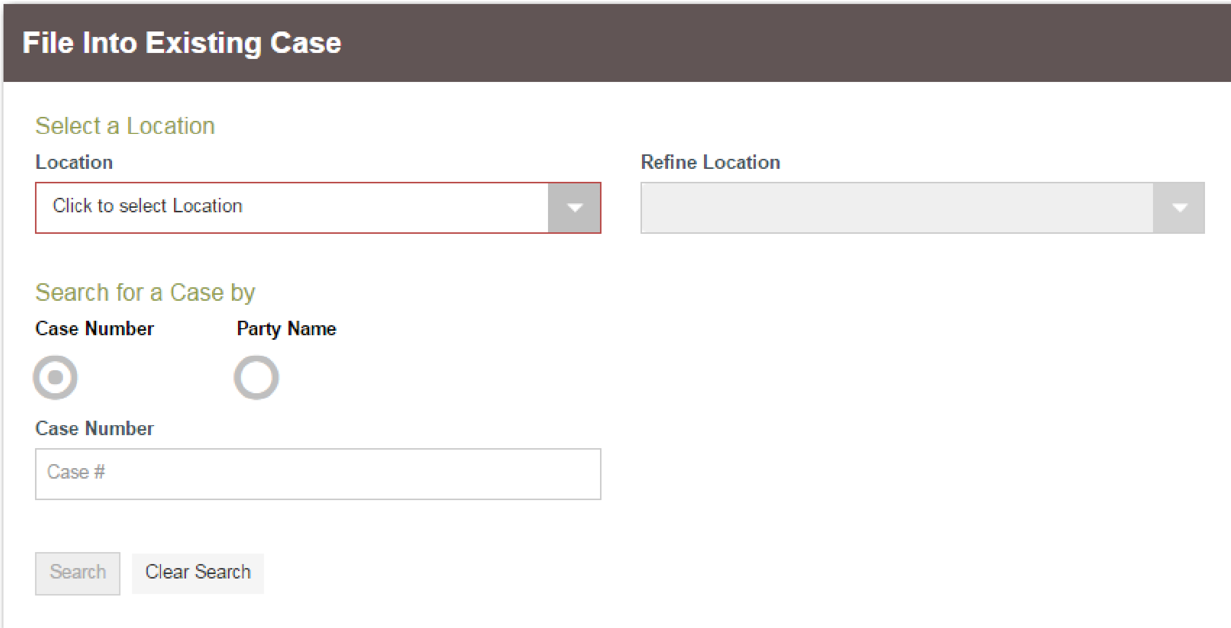
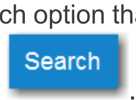


Figure 12.32 – File Into Existing Case Page

2. Select the county or district location from the **Location** drop-down list, and then select the specific court from the **Refine Location** drop-down list.

   Note: The items in the Refine Location list are determined by the location you selected.

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

3. Click the search option that you plan to use: **Case Number** or **Party Name**. Enter the search criteria, and then click 

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4. From the **Actions** drop-down list associated with the case, select **View Service Contacts**.

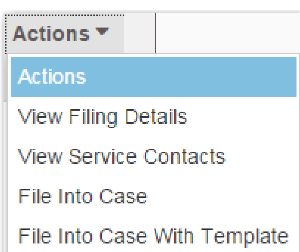

Figure 12.33 – Actions Drop-Down List

   The *Service Contacts* page for that case is displayed.

5. Locate the party for which you want to add service contacts. From the **Actions** drop-down list for the specified party, select **Add New Service Contact**.

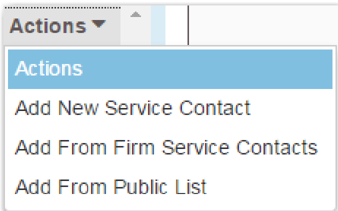

Figure 12.34 – Service Contacts Actions Drop-Down List

The page expands with new fields to complete for the new service contact.

6. Complete the required information for the new contact, and select the **Save Contact to Firm Service Contacts** check box to add the contact to the Firm Service Contacts list.

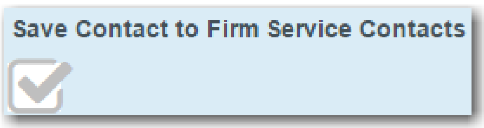

Figure 12.35 – Save Contact to Firm Service Contacts Check Box

7. Click 

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Creating Firm Service Contacts During Envelope Creation

To create service contacts during envelope creation, perform the following steps:

1. From the *Filer Dashboard* page or the **Actions** drop-down list, select **Start a New Case**.

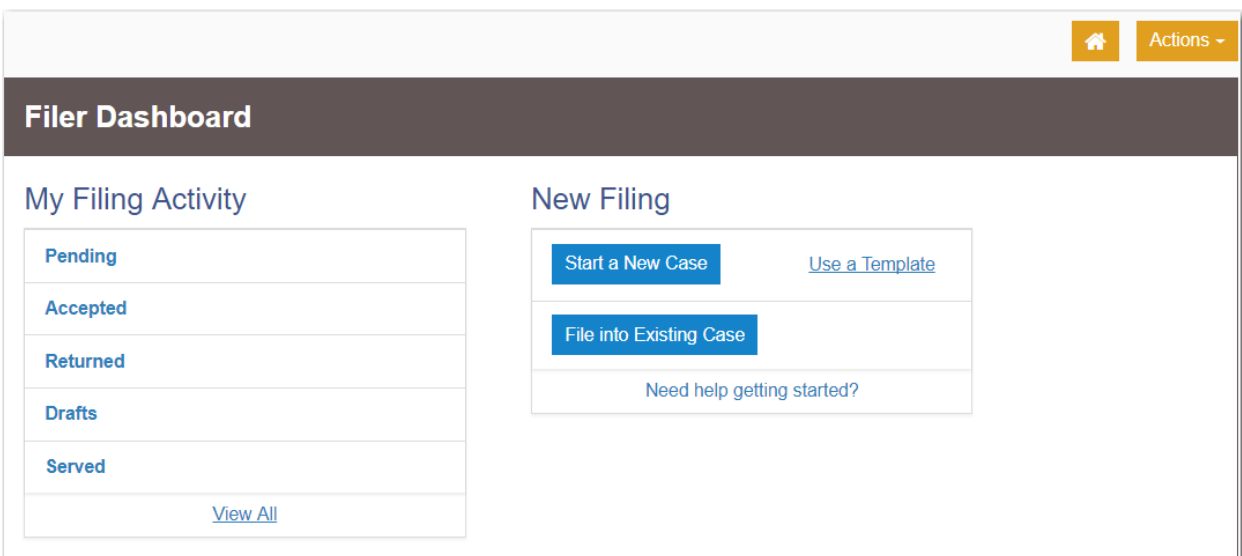


Figure 12.36 – Filer Dashboard Page

2. Complete the required fields in the **Case Information**, **Party Information**, and **Filings** sections.
3. Navigate to the **Service Contacts** section. Locate the party to which you want to add a service contact.
4. Select **Add New Service Contact** from the **Actions** drop-down list for the specified party.

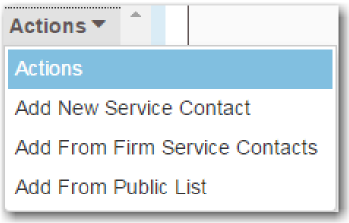


Figure 12.37 – Service Contacts Actions Drop-Down List

5. Complete the required fields for the new contact.

   Note: The Save Contact to Firm Service Contacts check box is selected by default. You can clear the check box if you do not want to add the service contact to the Firm Service Contacts list.

Figure 12.38 – Save Contact to Firm Service Contacts Check Box

6. Click 

, and then continue with the rest of the filing creation.

Selecting the Service Method for Service Contacts

You can select the service method for a service contact when you start a new case or when you add a service contact to an existing case.

To select the service method for a service contact when starting a new case, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

   The *Start a New Case* page is displayed.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section:

   Note: A red box around the field indicates that it is required.

3. Complete the fields in the **Party Information** section.
4. Enter the filing details for the case in the **Filings** section.
5. In the **Service Contacts** section, locate the party to which you want to add a service contact. From the **Actions** drop-down list for the specified party, select **Add From Firm Service Contacts**.

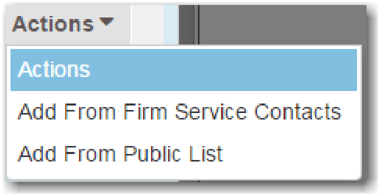


Figure 12.39 – Service Contacts Actions Drop-Down List

The *Add From Firm Service Contacts* dialog box is displayed.

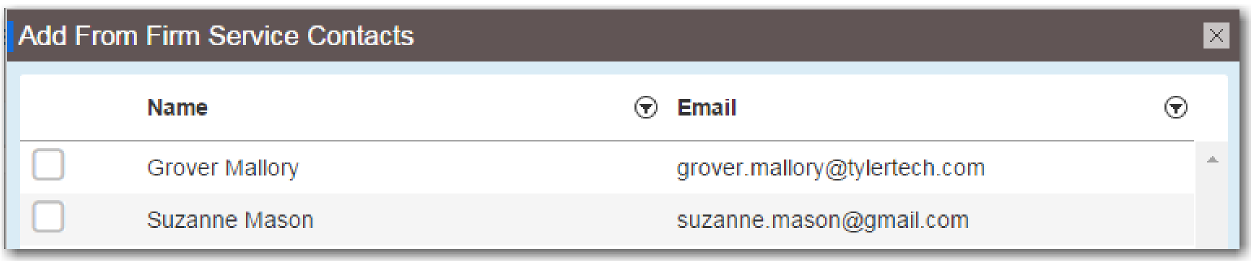


Figure 12.40 – Add From Firm Service Contacts Dialog Box

6. Select the check box next to the service contacts that you want to add to the case.

7. After selecting the new service contacts, click  .

   The new service contacts are now displayed in the **Service Contacts** section under the party to which the service contact has been added.

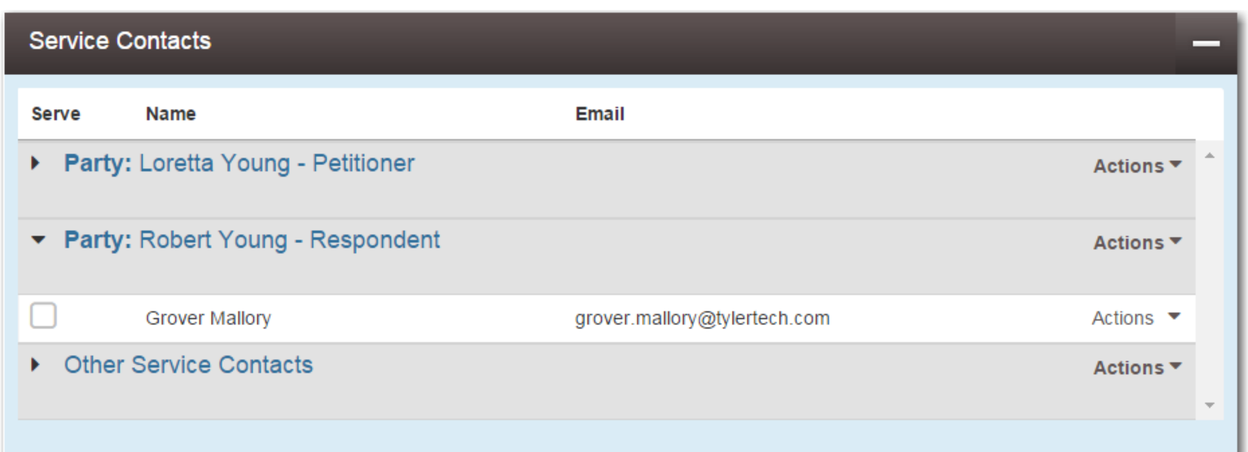


Figure 12.41 – Service Contacts Section

8. In the **Service Contacts** section, click the name of the new service contact that you added to select a service method.

   The **Service Method** field is displayed, along with the rest of the service contact's information.

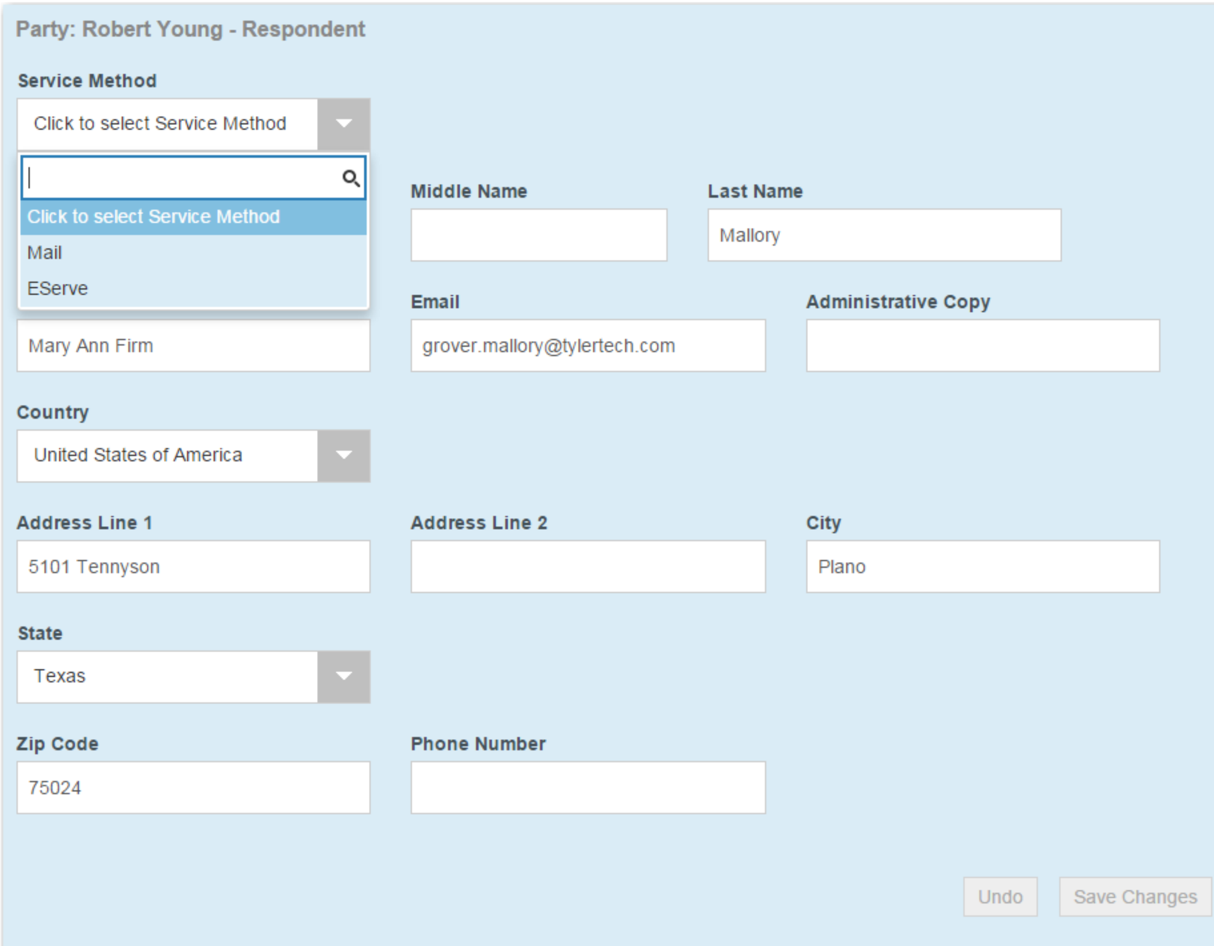


Figure 12.42 – Service Method Field in Service Contacts Section

9. Select the service method that you want from the **Service Method** drop-down list.

   Note: When the service method is set to EServe, an email address is required. When the service method is set to Mail, a street address is required.

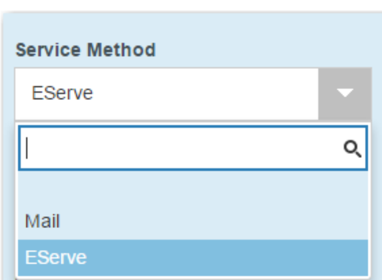


Figure 12.43 – Service Method Drop-Down List

10. Click 

.
11. Continue with the rest of your filing (i.e., selecting the fees).

12. When done, click either 

or 

.

Viewing Attached Case List of Firm Service Contacts

To view the case list that is attached to a firm service contact, perform the following steps:

1. From the **Actions** drop-down list, select **Firm Service Contacts**.

   The *Firm Service Contacts* page is displayed.

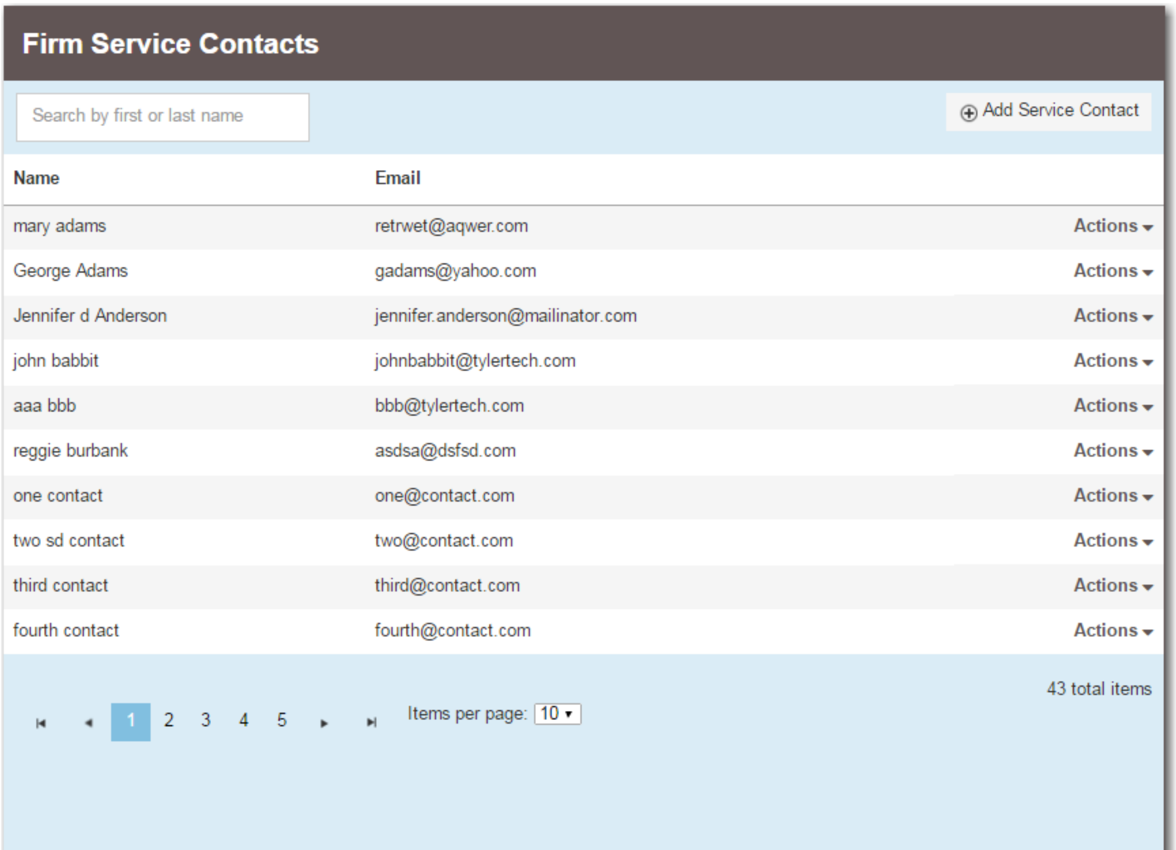


Figure 12.44 – Firm Service Contacts Page

2. Locate the name of the service contact for whom you want to view the attached cases. From the **Actions** drop-down list for the specified contact, select **View Attached Case List**.

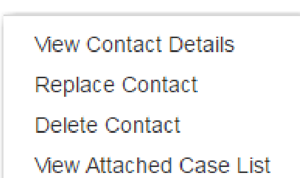


Figure 12.45 – Service Contacts Actions Drop-Down List

   The attached case list is displayed.

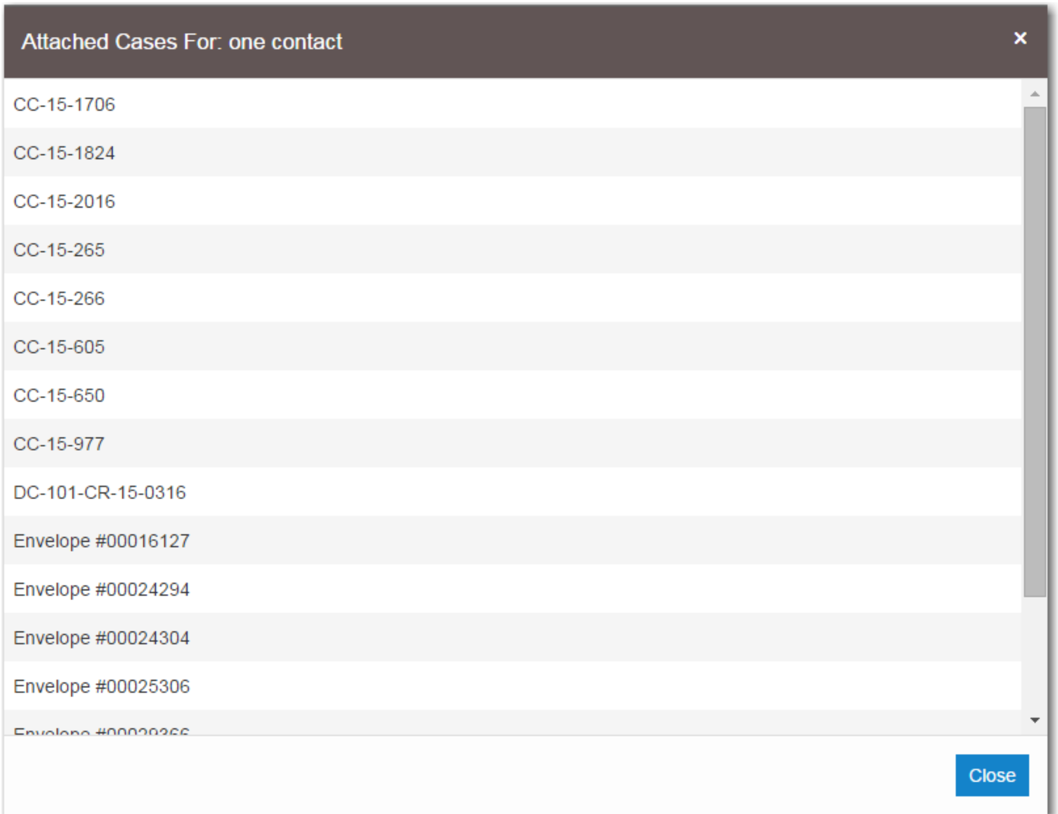


Figure 12.46 – Attached Cases Page

Viewing Service Contact Details

You can view the details of a service contact. Details that are available include the name of the person or firm who created the service contact, as well as the contact information for the service contact.

To view the service contact details, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Start a New Case**.

   Note: You can also click Start a New Case on the Filer Dashboard in the New Filing section.

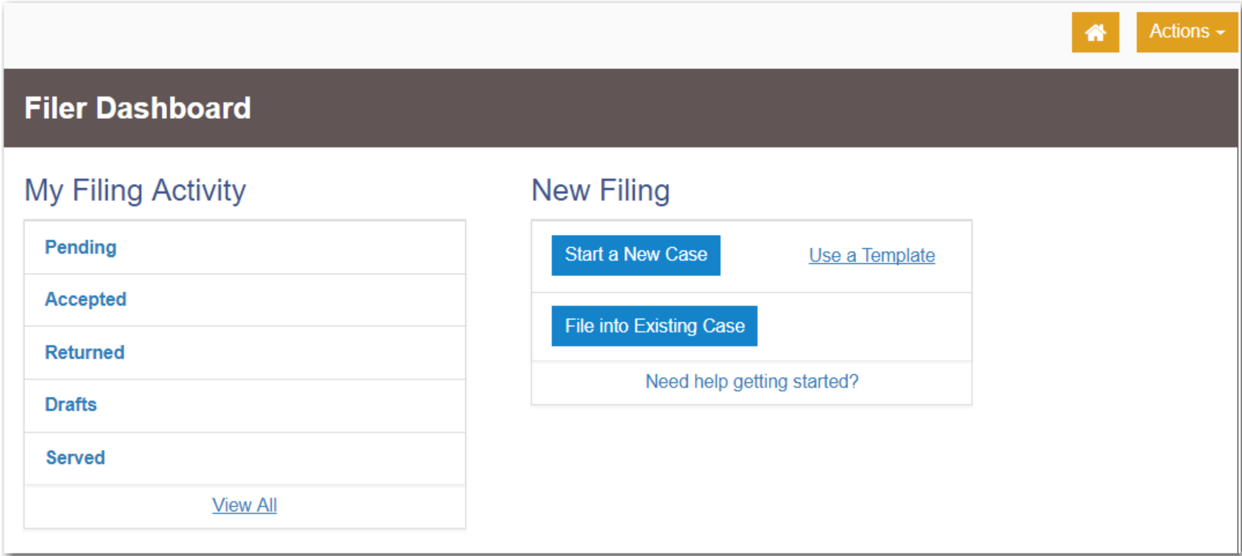
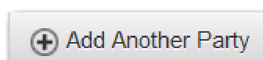


Figure 12.47 – Filer Dashboard Page

The *Start a New Case* page is displayed.

2. Complete the details for the new case by using the drop-down lists in the required fields in the **Case Information** section.
3. After completing the required fields, click .
4. In the **Party Information** section, enter the required information for the first party on the case. To indicate whether the party is a business or agency, select the **Party is a Business/Agency** check box.
5. If you want to add another party to the filing, click , and then enter the party information for the second party.
6. After completing the fields for all parties, click .
7. Enter the filing details for the case in the **Filings** section.
8. After you have completed the required fields, proceed to the **Service Contacts** section.
9. Add the service contacts for each party as applicable.
10. To view the details for a particular service contact, highlight the specified contact.

The details for that contact are displayed below the other service contacts.

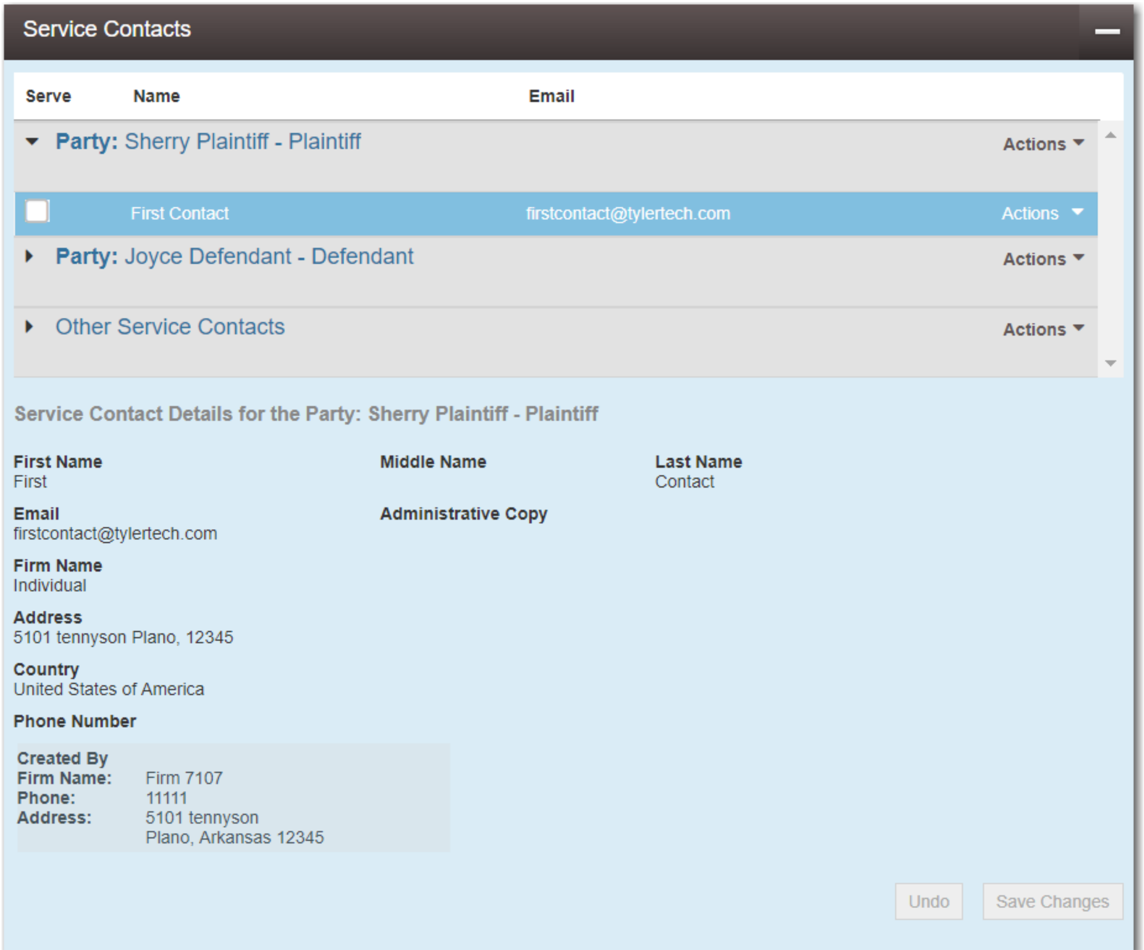


Figure 12.48 – Service Contacts Section with the Details Displayed

11. Click **Save Changes** to save your changes, or click **Undo** to cancel the action.

Linking a Service Contact to Another Party

You can link a service contact associated to a party on a case to another party on the same case.

To link a service contact to another party, perform the following steps:

1. From the *Filing History* page, locate the case for which you want to modify the service contacts. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

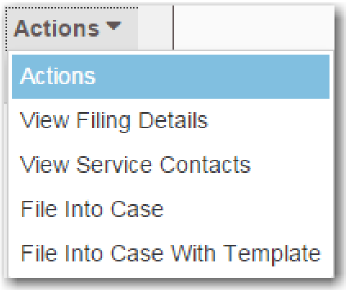


Figure 12.49 – Actions Drop-Down List

The *Service Contacts* page for the specified case is displayed.

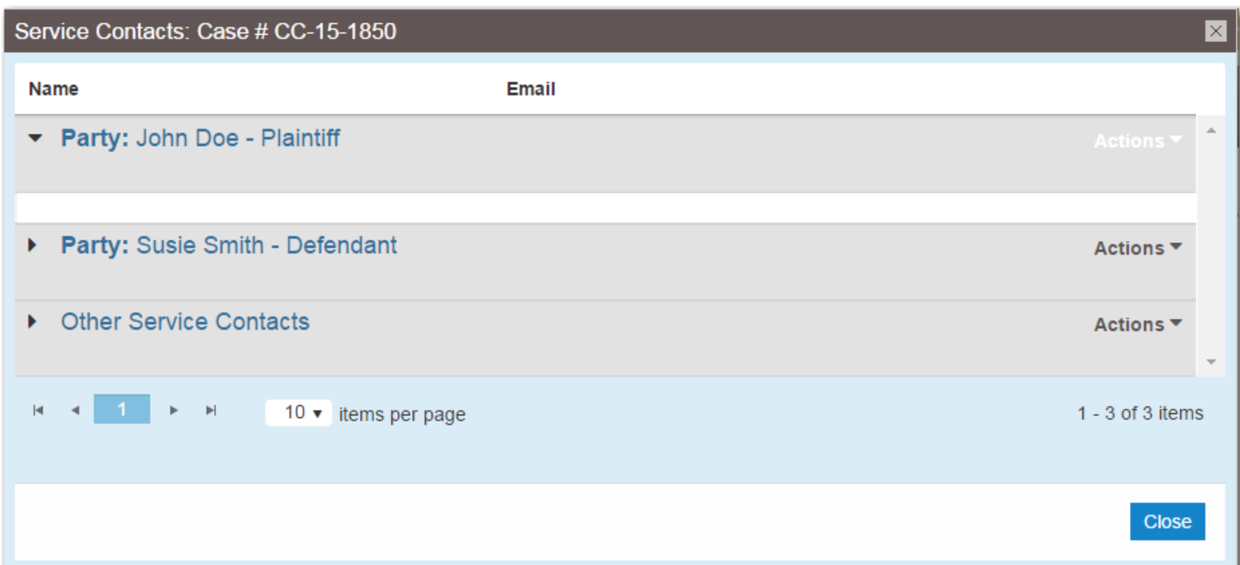


Figure 12.50 – Service Contacts Page

2. From the **Actions** drop-down list for the specified party, select **Link Parties with Contact**.

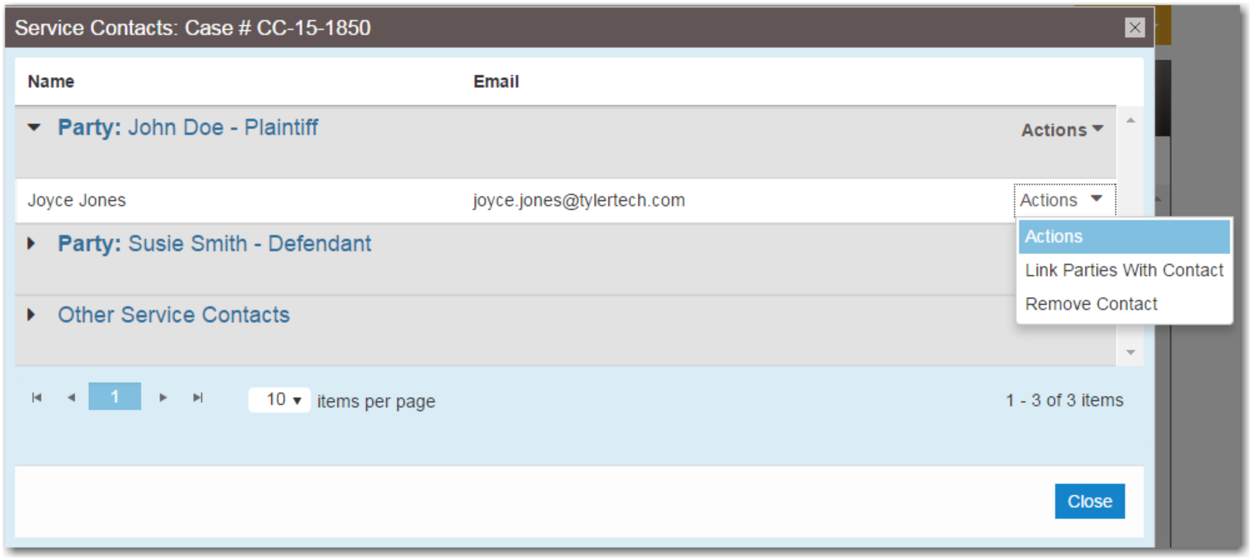


Figure 12.51 – Link Parties with Contact Drop-Down List on the Service Contacts Page

The *Link Parties* dialog box is displayed. You can link or unlink service contacts to parties on the case by selecting or clearing the check box associated with the party.

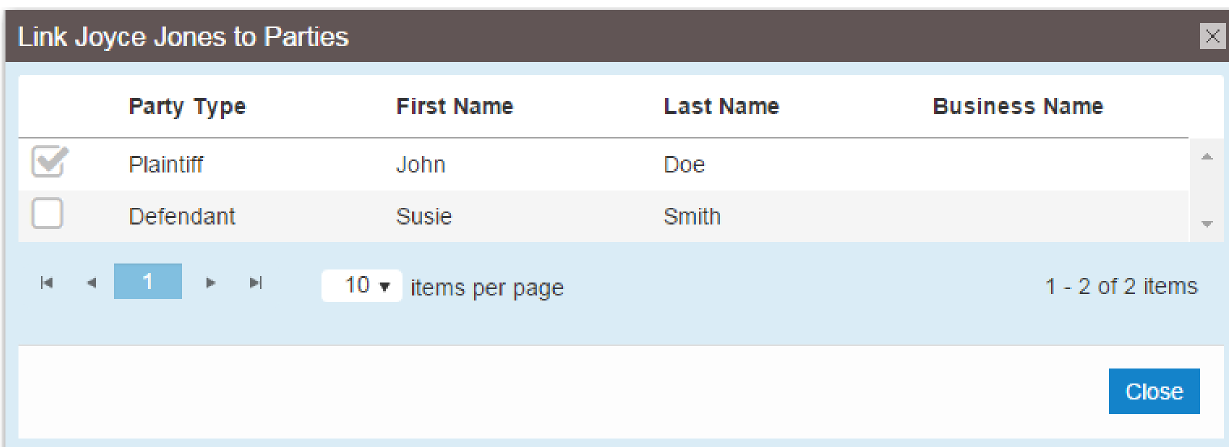


Figure 12.52 – Link Parties Dialog Box

3. Click 

to return to the *Service Contacts* page for the specified case.

Search and Paging Capability for Firm Service Contacts

Firm service contacts can be displayed on multiple pages to allow for searching among the contacts.

The paging is activated when more than 10 service contacts exist in the system. You can select the number of items per page to be displayed: 10, 25, or 50.

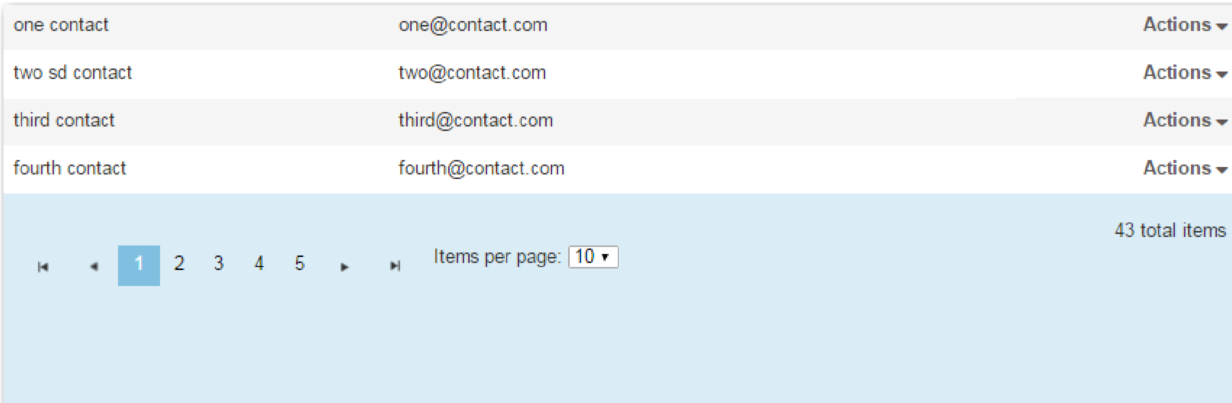


Figure 12.53 – Firm Service Contacts Page with Paging Feature

Also, you can search for a specific service contact by typing part of or the entire contact's name in the text box on the *Firm Service Contacts* search page.

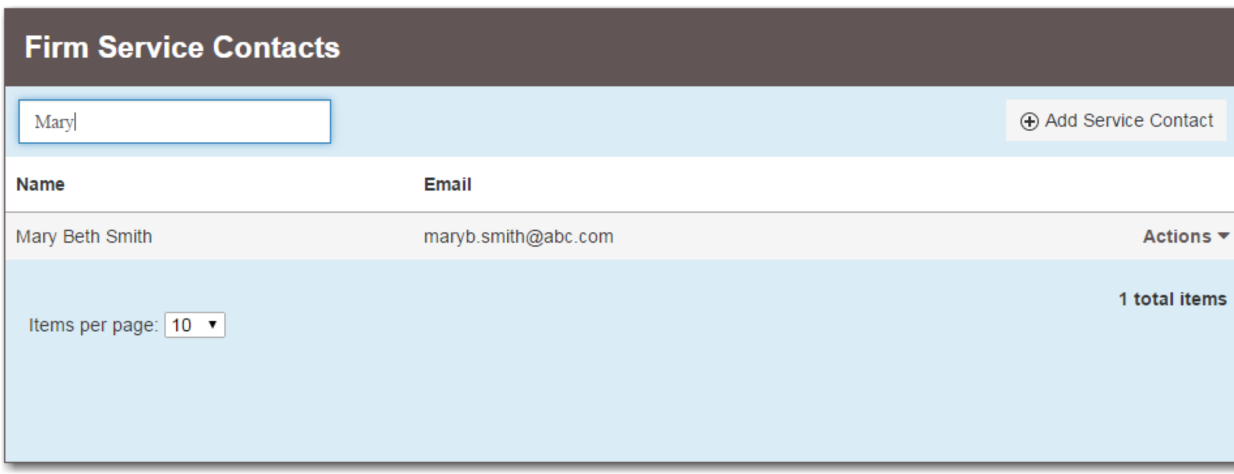


Figure 12.54 – Firm Service Contacts Search Page

Removing a Service Contact from a Case

You can remove a service contact that was previously added to a case.

Note: You can remove a service contact from a case only if you or your firm created that service contact or added that service contact to the case.

To remove a service contact from a case, perform the following steps:

1. From the *Filing History* page, locate the case from which you want to remove a service contact. From the **Actions** drop-down list for the specified case, select **View Service Contacts**.

   The *Service Contacts* page for the specified case is displayed.

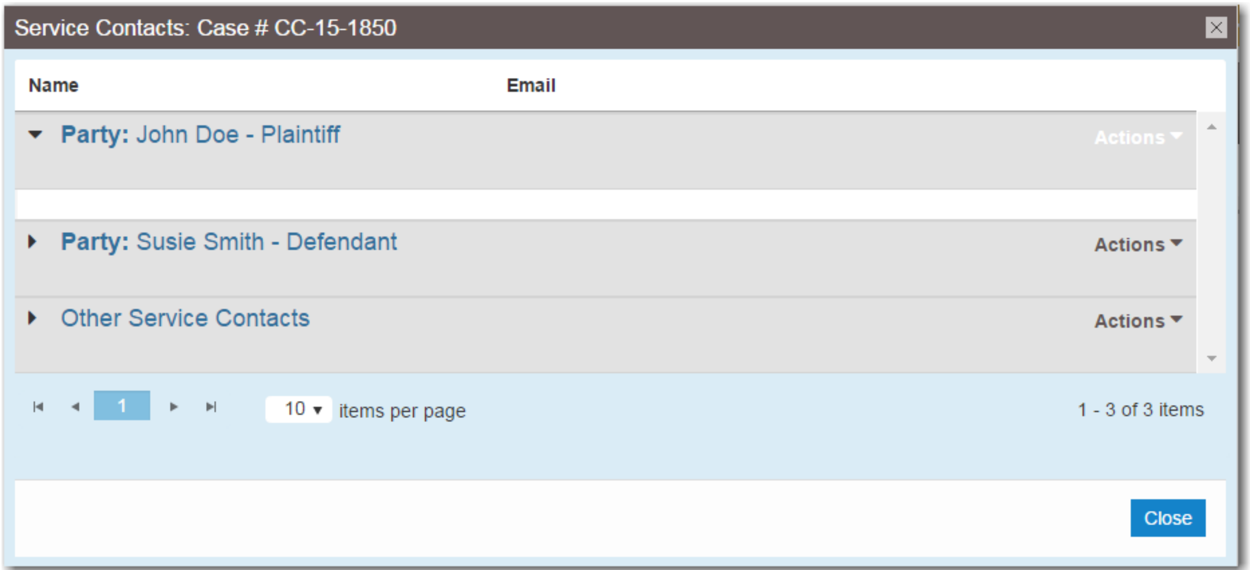


Figure 12.55 – Service Contacts Page

2. Locate the service contact that you want to remove. From the **Actions** drop-down list for the specified contact, select **Remove Contact**.

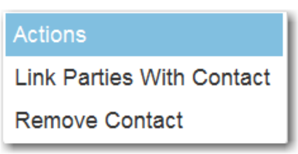


Figure 12.56 – Service Contacts Actions Drop-Down List

The contact is removed from the case.

Note: A notification is sent to service contacts that are being removed from a case.

Note: If the contact is a public service contact, it remains on the public service contacts list and can only be removed from the public list by a member of the firm that originally added the service contact.

Deleting a Service Contact from the Firm

You can delete a service contact associated with your firm.

To delete a service contact from your firm, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Firm Service Contacts**.

   The *Firm Service Contacts* page is displayed.

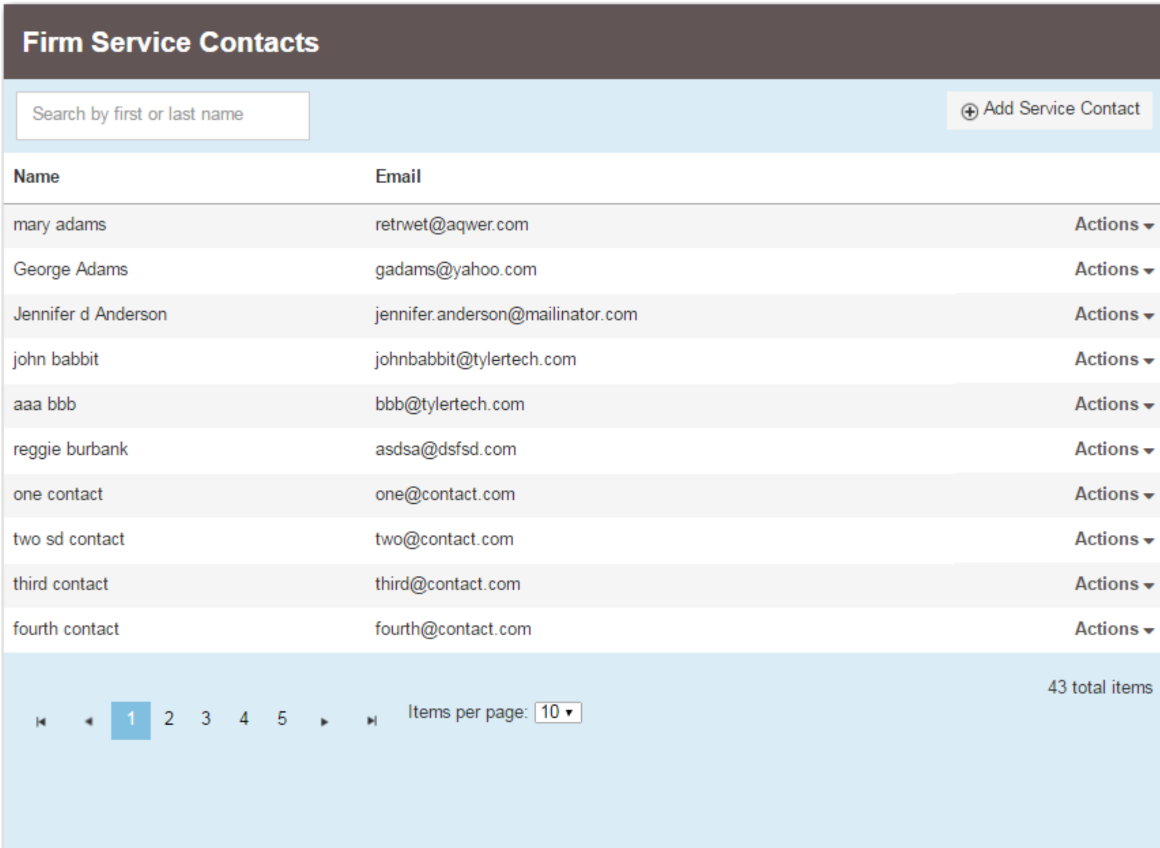


Figure 12.57 – Firm Service Contacts Page

2. Locate the service contact that you want to delete.
3. From the **Actions** drop-down list for the specified service contact, select **Delete Contact**.

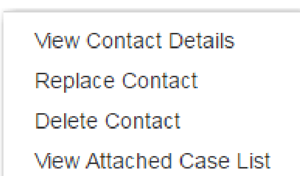


Figure 12.58 – Firm Service Contacts Actions Drop-Down List

The *Delete Service Contact* dialog box is displayed.

Note: A warning message is displayed, which indicates the number of cases to which the service contact is attached. The warning message also reminds you that deleting a service contact cannot be undone.

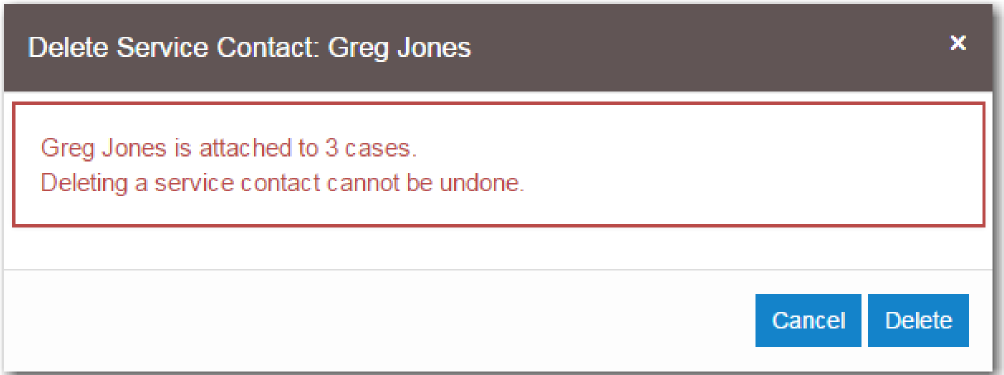


Figure 12.59 – Delete Service Contact Dialog Box

4. Click Delete to delete the contact, or click Cancel to cancel the action.

   If you deleted the service contact, it is removed from the Firm Service Contacts list and from any filings to which it was attached.

13 Filings

Topics covered in this chapter

After you have uploaded and submitted your filing, the filing is displayed on the *Filing History* page. From this page, you can view the status of your filing, check the filing type, get a document description, see the number assigned to your case, review the details of the case, 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.

View Filings

You can view the details of a case after starting a new case or filing into an existing case by using the *Filing History* page.

Use the *Filing History* page to perform many of the tasks associated with e-filing. From the *Filing History* page, you can manage your firm's service contacts on a case, view the details of the case, add existing case filings to a case, resume (continue) the filing process of a case saved as a draft, and cancel a filing.

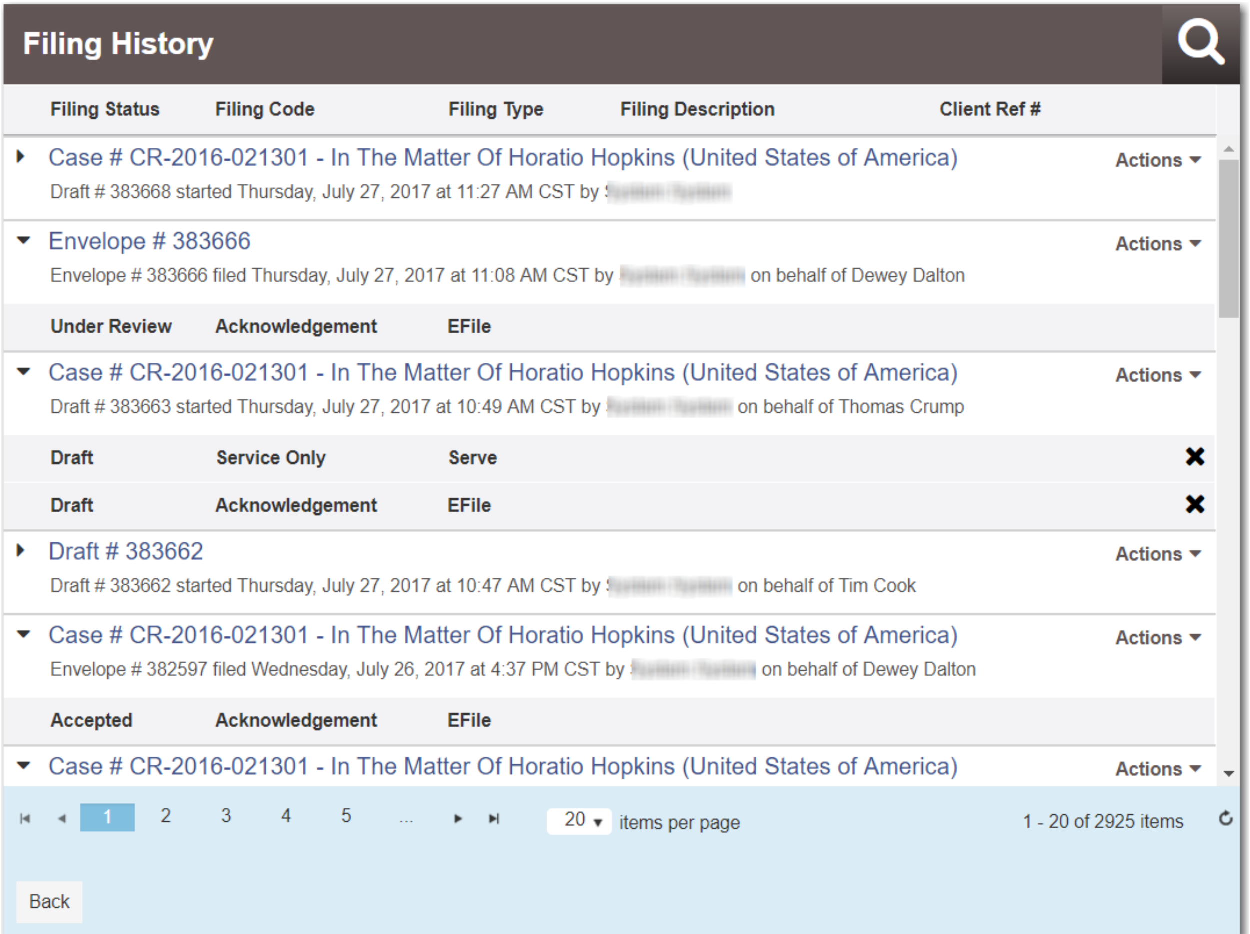


Figure 13.1 – Filing History Page

Filtering the Filings Queue

The *Filing History* page displays the status of each filing. The status information is located in the **Filing Status** column.

Note: You can see the status for only the filings that you have submitted, not for all filings related to a case.

To filter information in the filings queue, perform the following steps:

1. Select **Filing History** from the **Actions** drop-down list on the *Filer Dashboard* page.

   All relevant information concerning your filings is displayed on the *Filing History* page.

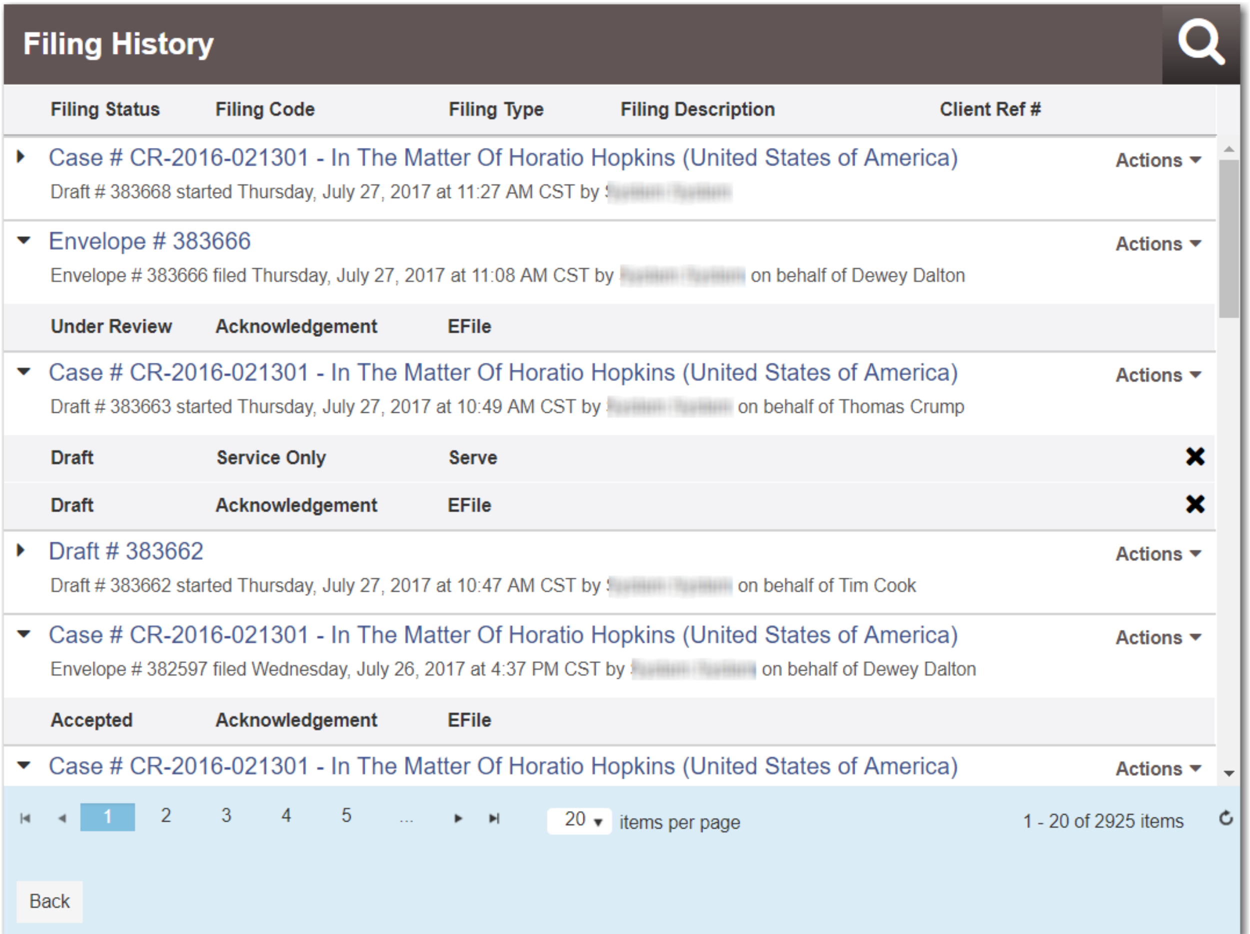


Figure 13.2 – Filing History Page

2. Click **Search** () to filter the search.

   The *Filing History* page for filtering a search is displayed.

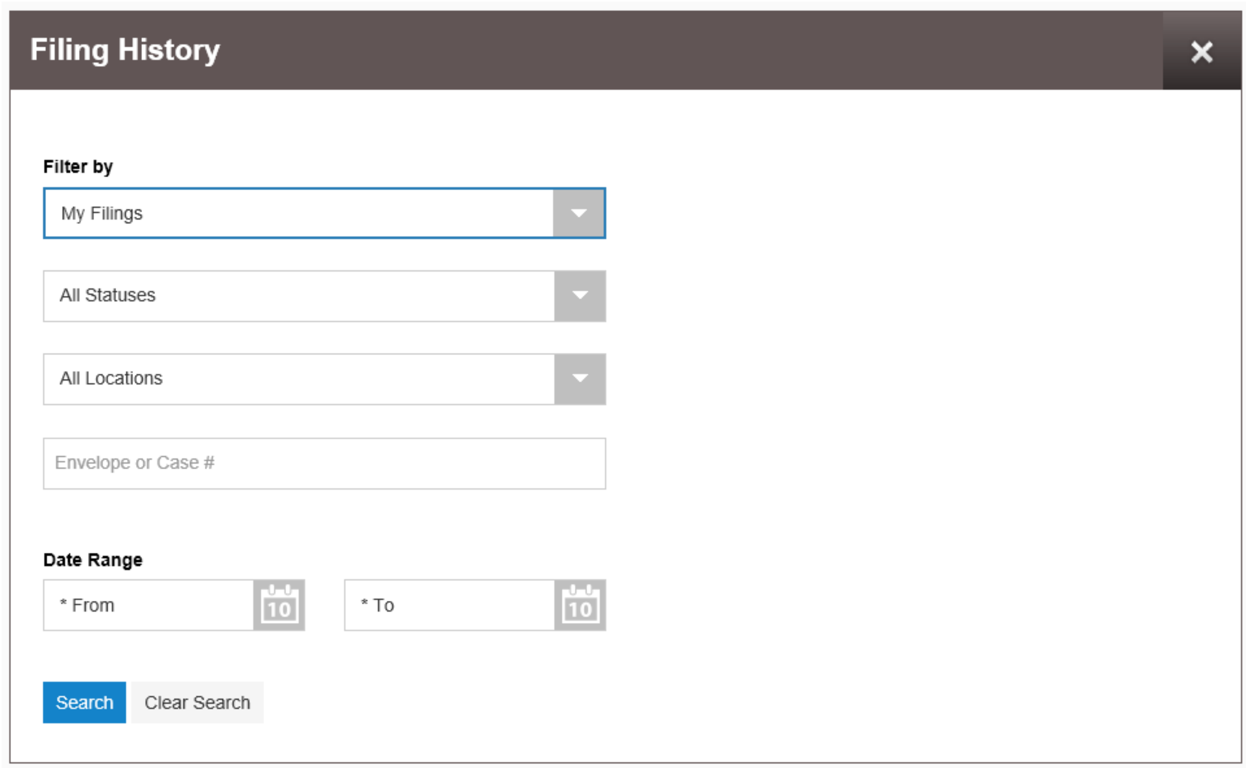


Figure 13.3 – Filing History Page for Filtering a Search

Note: To clear the filter, click  **.**

3. Enter more criteria to refine your search.

   a. In the **Filter by** field, select an option from the drop-down list.

Figure 13.4 – Filter by Drop-Down List

   b. Select the status from the **All Statuses** drop-down list.

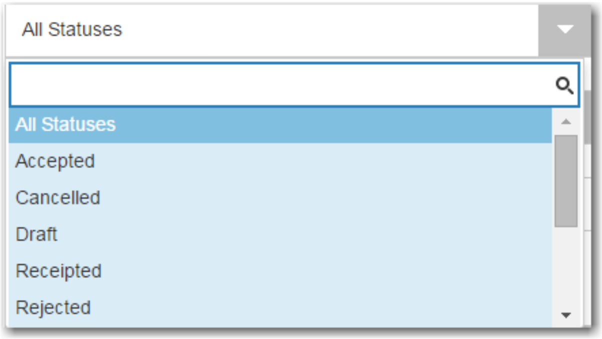


Figure 13.5 – All Statuses Drop-Down List

c. Select the location from the **All Locations** drop-down list.

d. If known, type the envelope or case number in the **Envelope or Case #** field.

e. In the **Date Range** field, select the dates for your search. For the **From** or the **To** date, click  to select dates from a calendar. Or, type the dates manually (for example, `7/15/2015`).

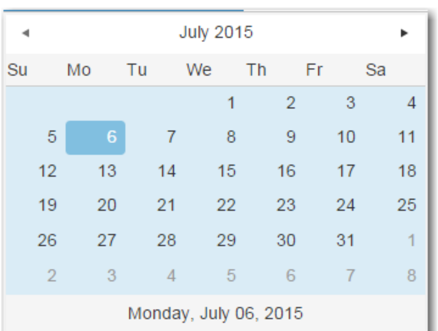


Figure 13.6 – Filter Date Calendar

4. Click 

A list of cases meeting your search criteria is displayed.

Copying the Envelope

You can copy an envelope to create a new envelope to resubmit to the courts if all filings on the envelope have been canceled or rejected.

Note: After you copy your envelope with a rejected filing, note that the first filing in the filing table is selected.

Note: This feature requires special configuration by Tyler. The feature can be configured two different ways. One way is to display the Copy Envelope option only one time. If the system is configured in this manner, you can copy the envelope only once. You cannot copy it again. The second configuration is to display the Copy Envelope option at all times. If the system is configured in this manner, you can copy the envelope multiple times.

To copy an envelope, perform the following steps:

1. From the **Actions** drop-down list, select **Filing History**.

   The *Filing History* page is displayed.

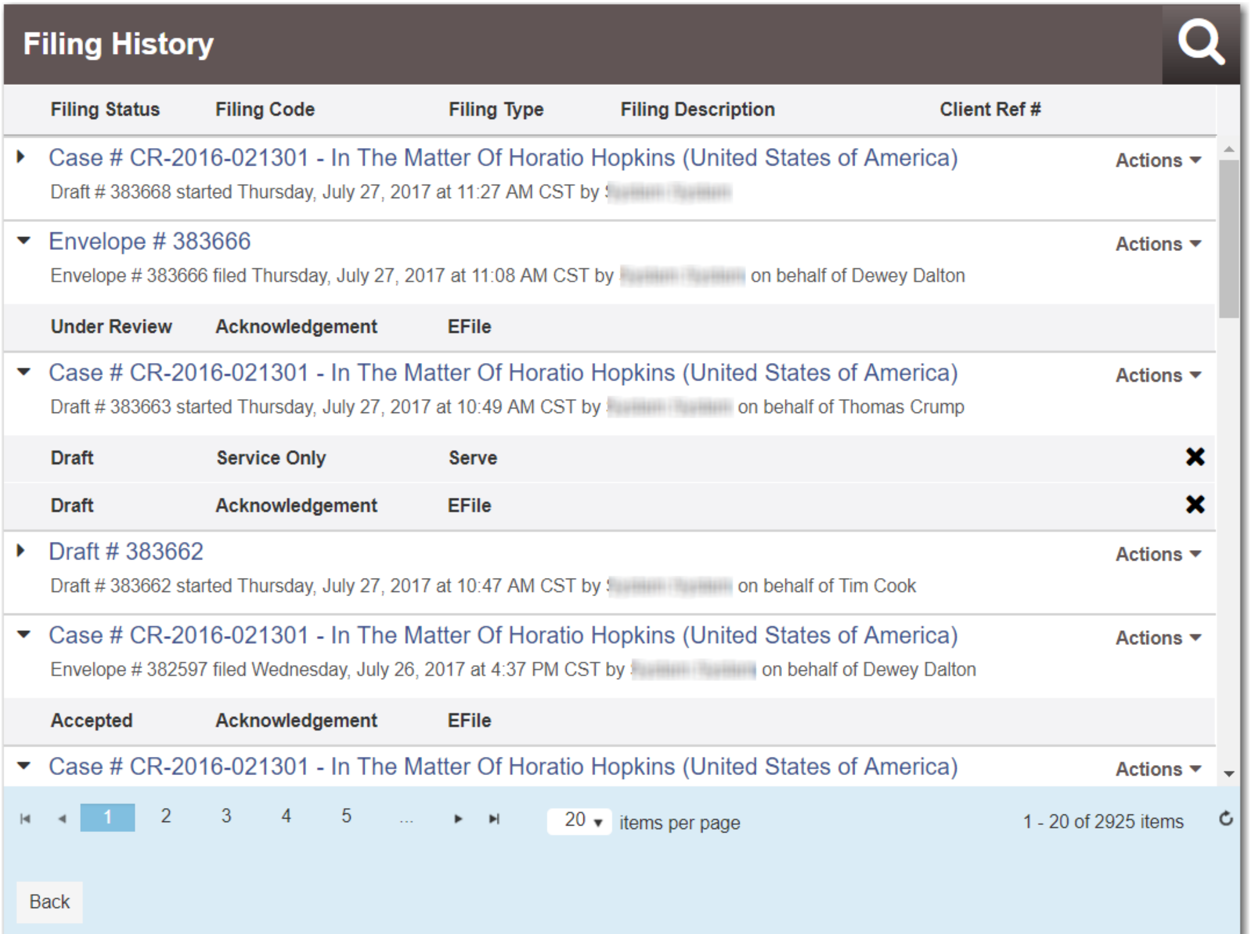


Figure 13.7 – Filing History Page

2. Locate your envelope on the *Filing History* page.
3. From the envelope **Actions** drop-down list, select **Copy Envelope**.

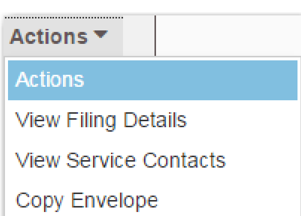


Figure 13.8 – Actions Drop-Down List

   The *Envelope* page is displayed.

4. Continue with your filing.

Viewing the Envelope Details

From the *Filing History* page, you can see the information entered for the envelope, the filing details, and the documents submitted.

To view the envelope details, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Filing History**.

   The *Filing History* page is displayed.

   Note: The time stamp indicates the time and date that the filing was submitted. The time stamp corresponds to the time zone in which the filing occurred.

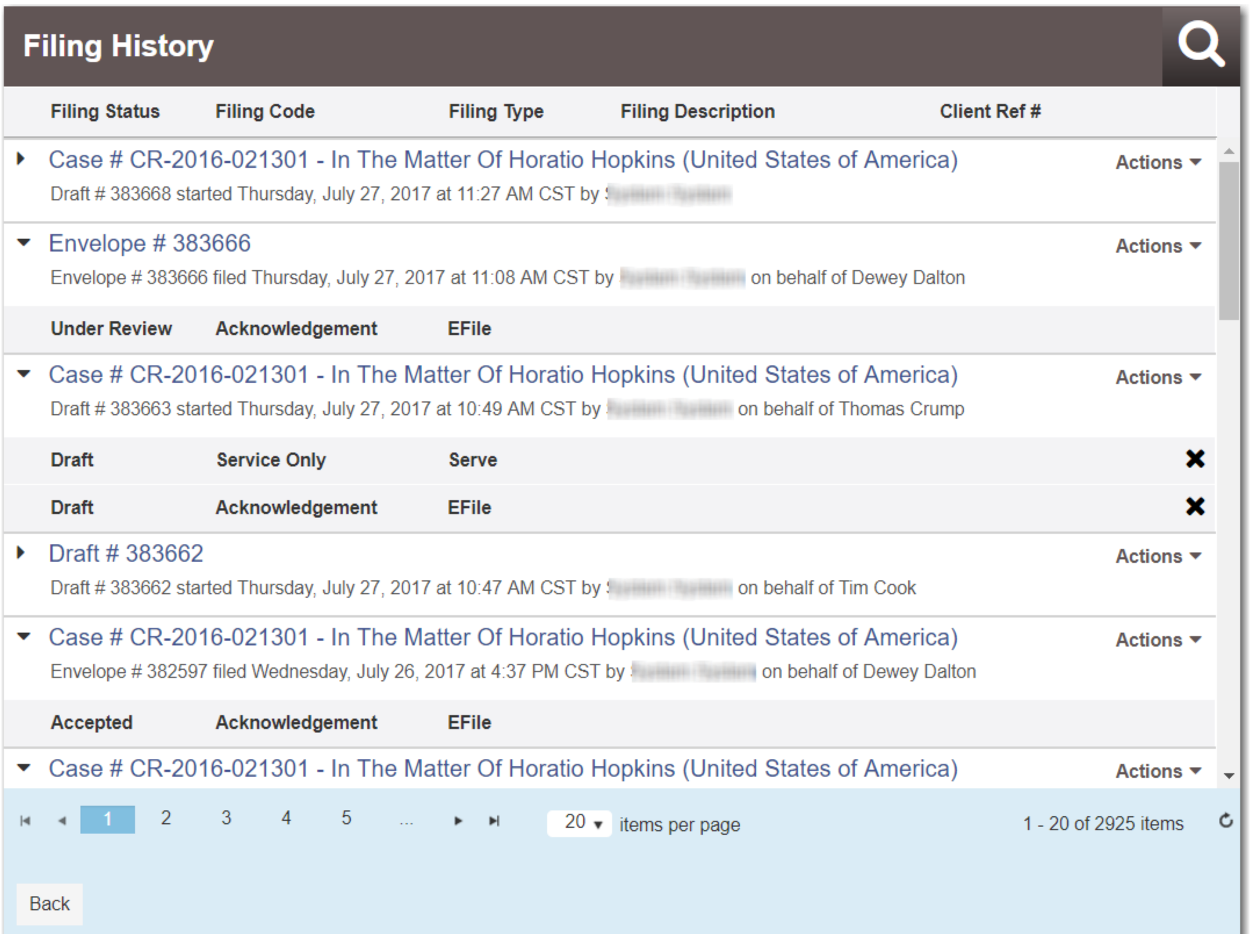


Figure 13.9 – Filing History Page

2. Locate your case on the *Filing History* page.
3. From the envelope **Actions** drop-down list, select **View Filing Details**.

   The *Envelope* page is displayed.

   Note: Only fields that contain values are displayed in the filing details. Fields that contain no data are not displayed. Fields that contain protected data that is masked by configuration, such as the case category and case type, are displayed as asterisks.

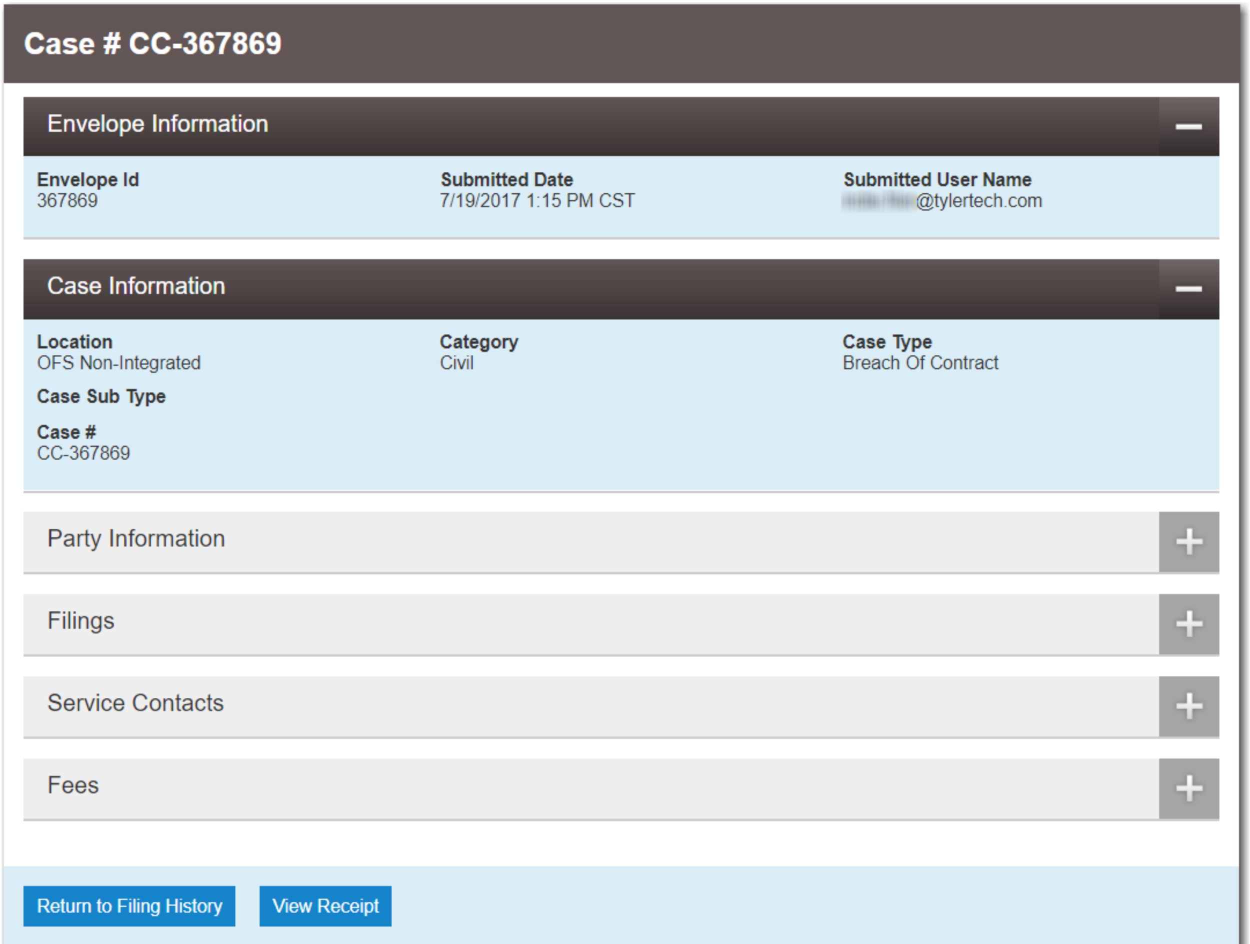
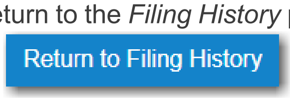


Figure 13.10 – Envelope Page

4. To return to the *Filing History* page, either select **Filing History** from the **Actions** drop-down list, or click  .

Viewing the Filer ID in Envelope Details

The Filer ID is displayed in the **Party Details** section of a case in the **Party Information** section.

Note: The Filer ID is displayed only when the party type and case type combination are configured to retrieve that information and when the court's case management system sends the information to Tyler.

To view the filer ID in the envelope details, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Filing History**.

   The *Filing History* page is displayed.

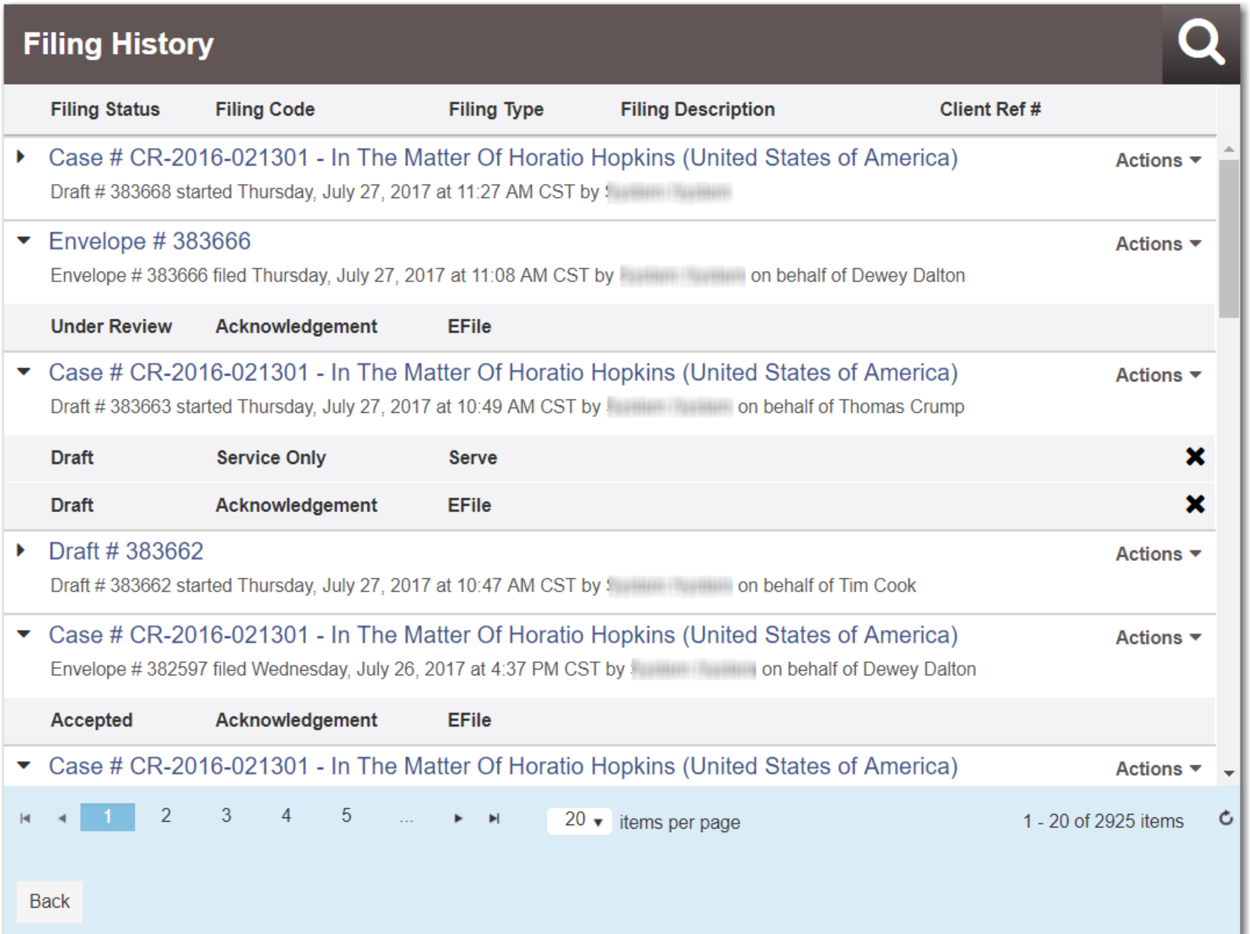


Figure 13.11 – Filing History Page

2. Locate your case on the *Filing History* page.
3. From the envelope **Actions** drop-down list, select **View Filing Details**.

   The *Envelope* page is displayed.

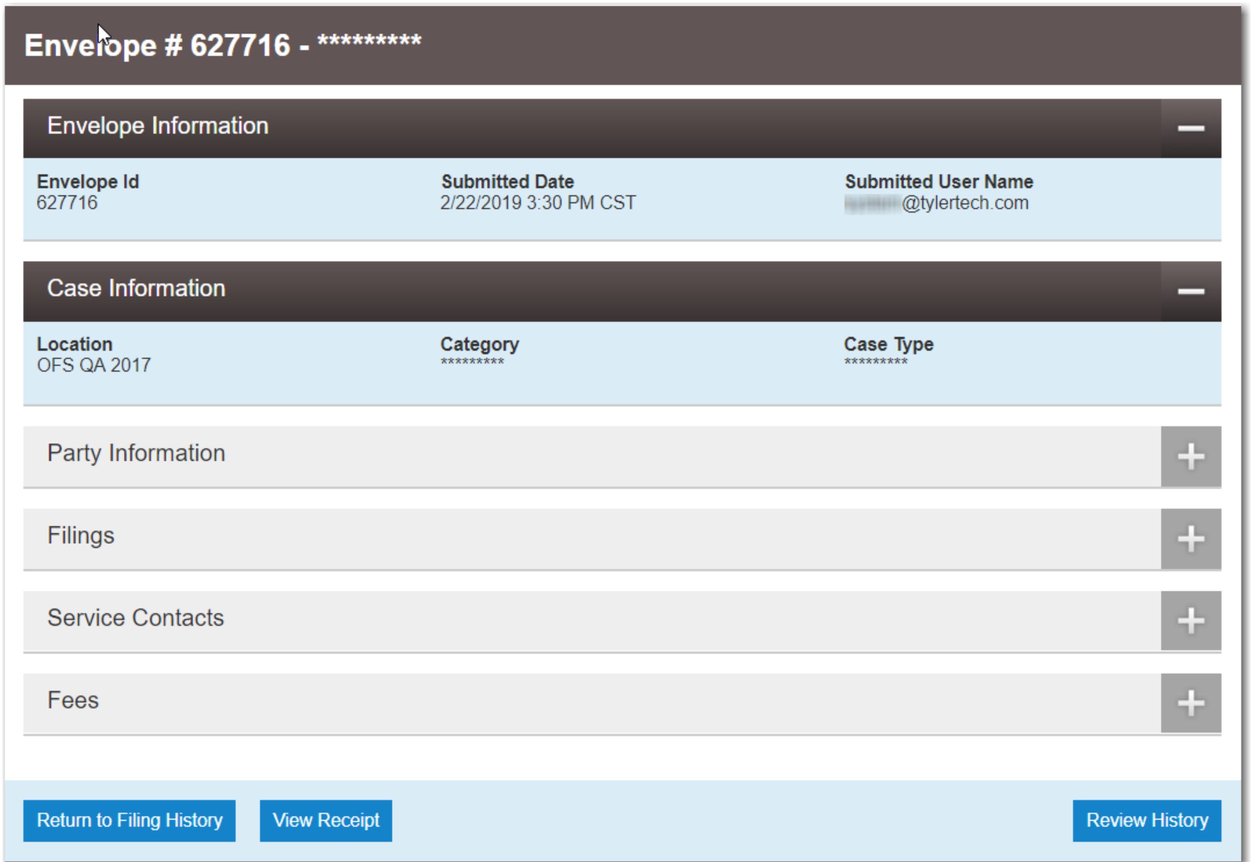


Figure 13.12 – Envelope Page

4. Navigate to the **Party Information** section. Expand the view if necessary.

   The Filer ID is included in the **Party Details** section.

Figure 13.13 – Filer ID in the Party Details Section of the Party Information Section

Viewing Envelope Details for Returned Filings

Note: This feature is configured by Tyler and may not be available on your system. The wording displayed on your system will remain as "Reject" or "Rejected" unless you ask Tyler to change it.

To view the envelope details for a returned filing, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Filing History**.

   The *Filing History* page is displayed.

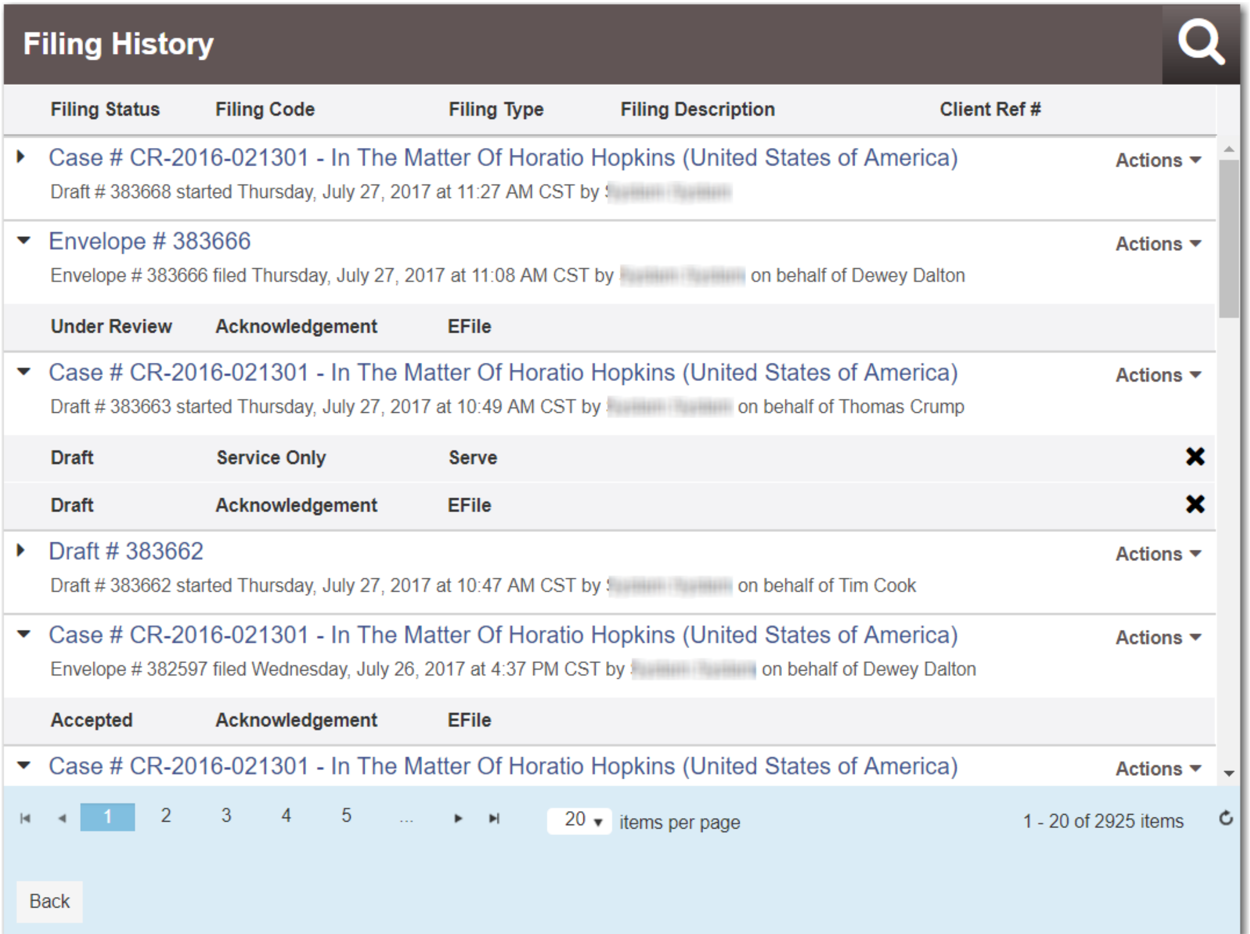


Figure 13.14 – Filing History Page

2. Locate your case on the *Filing History* page.
3. From the envelope **Actions** drop-down list, select **View Filing Details**.

   The *Envelope* page is displayed.

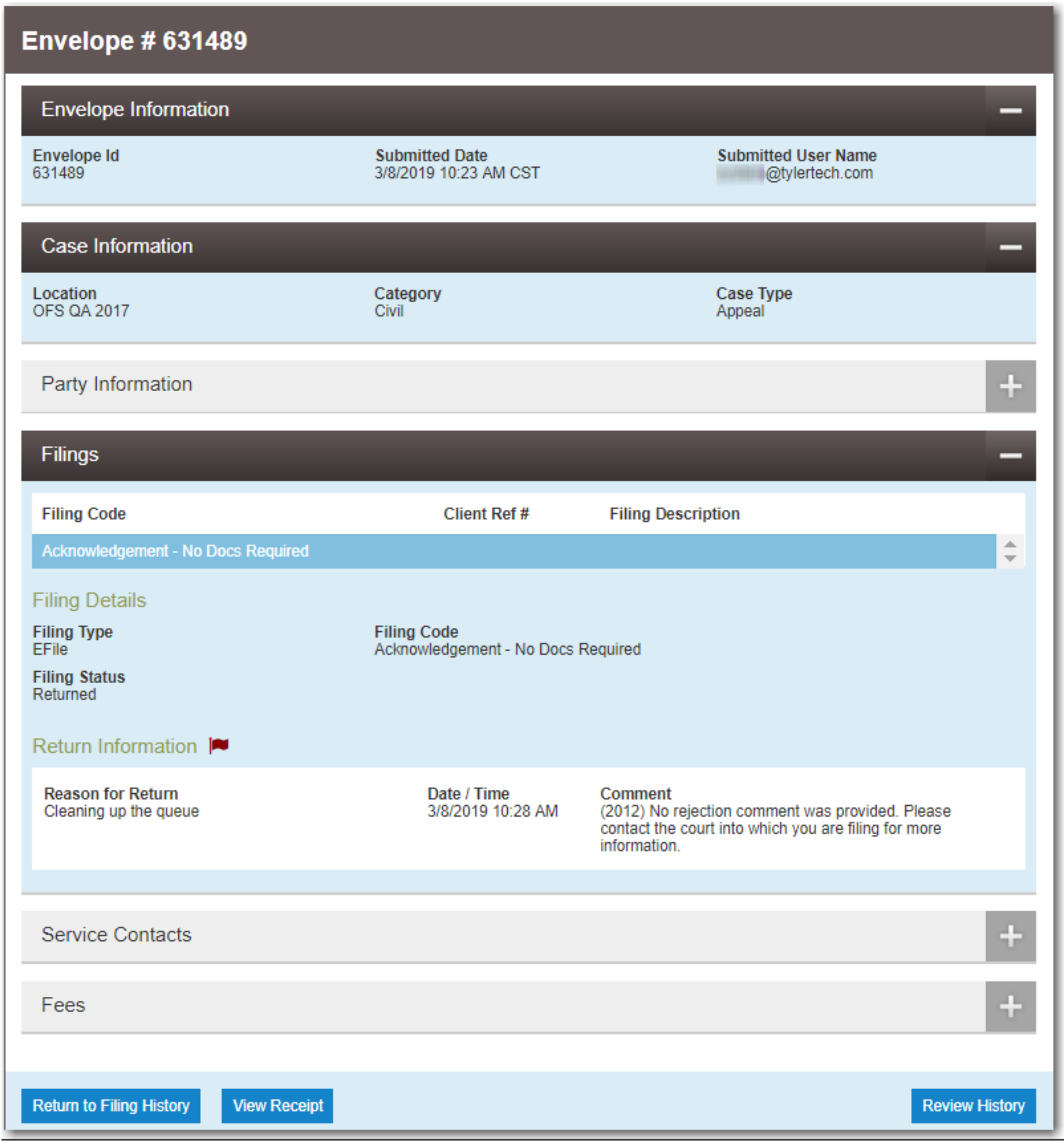


Figure 13.15 – Envelope Page

4. Click 

.

   The envelope receipt is displayed.

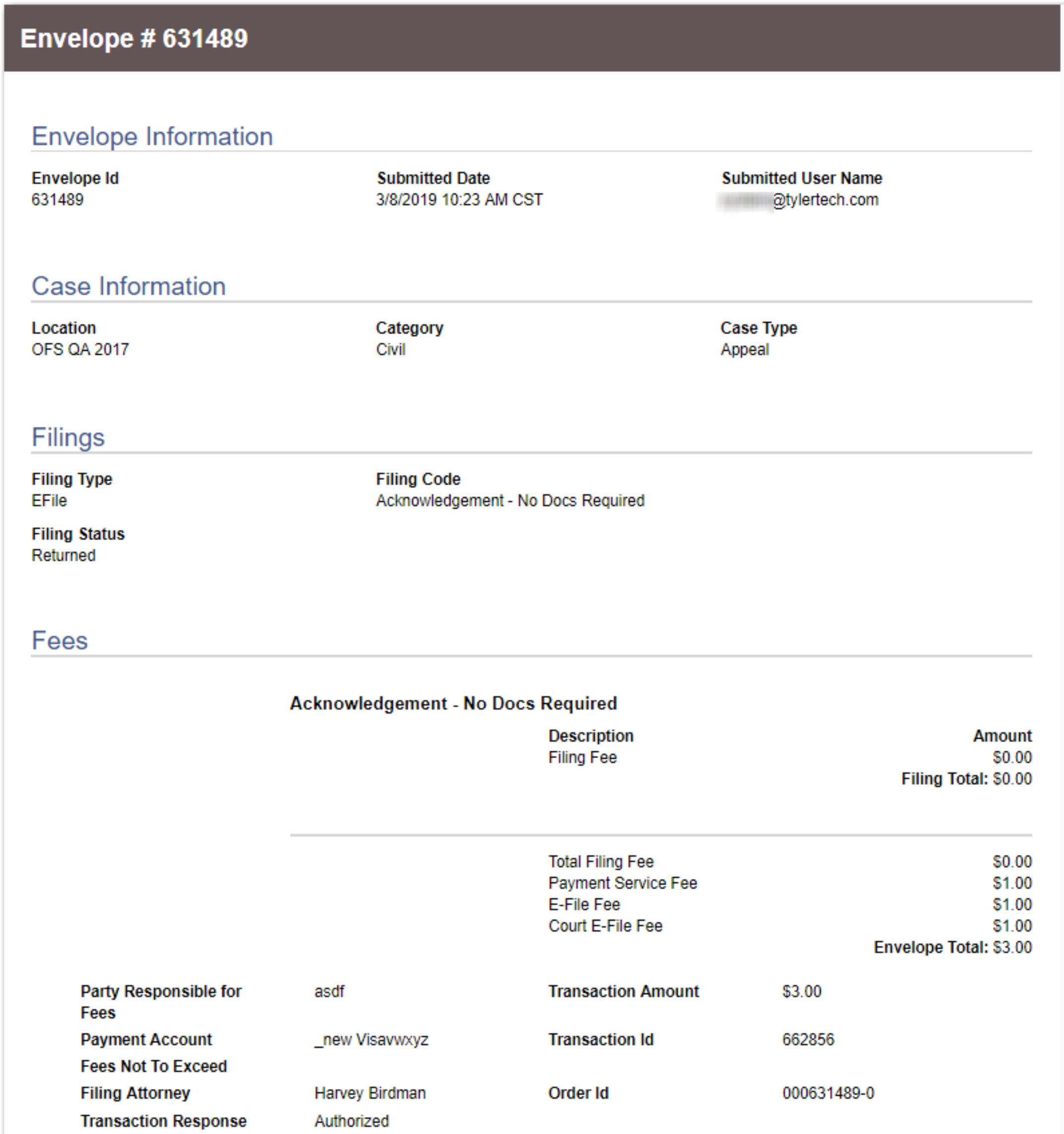


Figure 13.16 – Envelope Receipt

Viewing Certified Mail Services Information in Envelope Details

You can view the status of certified mail that you have sent.

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

To view the certified mail services information in the envelope details, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Filing History**.

   The *Filing History* page is displayed.

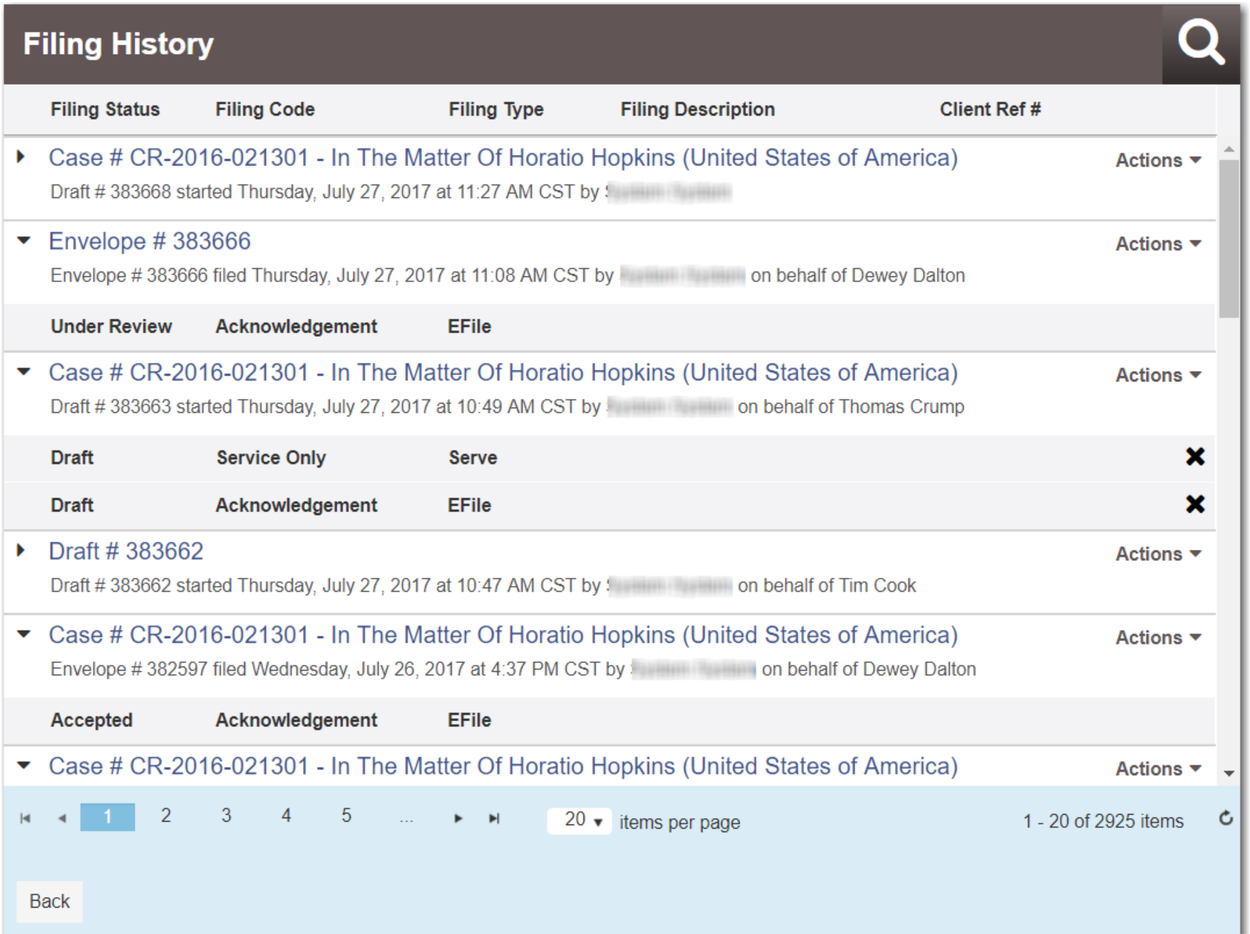


Figure 13.17 – Filing History Page

2. Locate your case on the *Filing History* page.
3. From the envelope **Actions** drop-down list, select **View Filing Details**.

   The *Envelope* page is displayed.
4. Navigate to the **Filings** section. Expand the view if necessary.

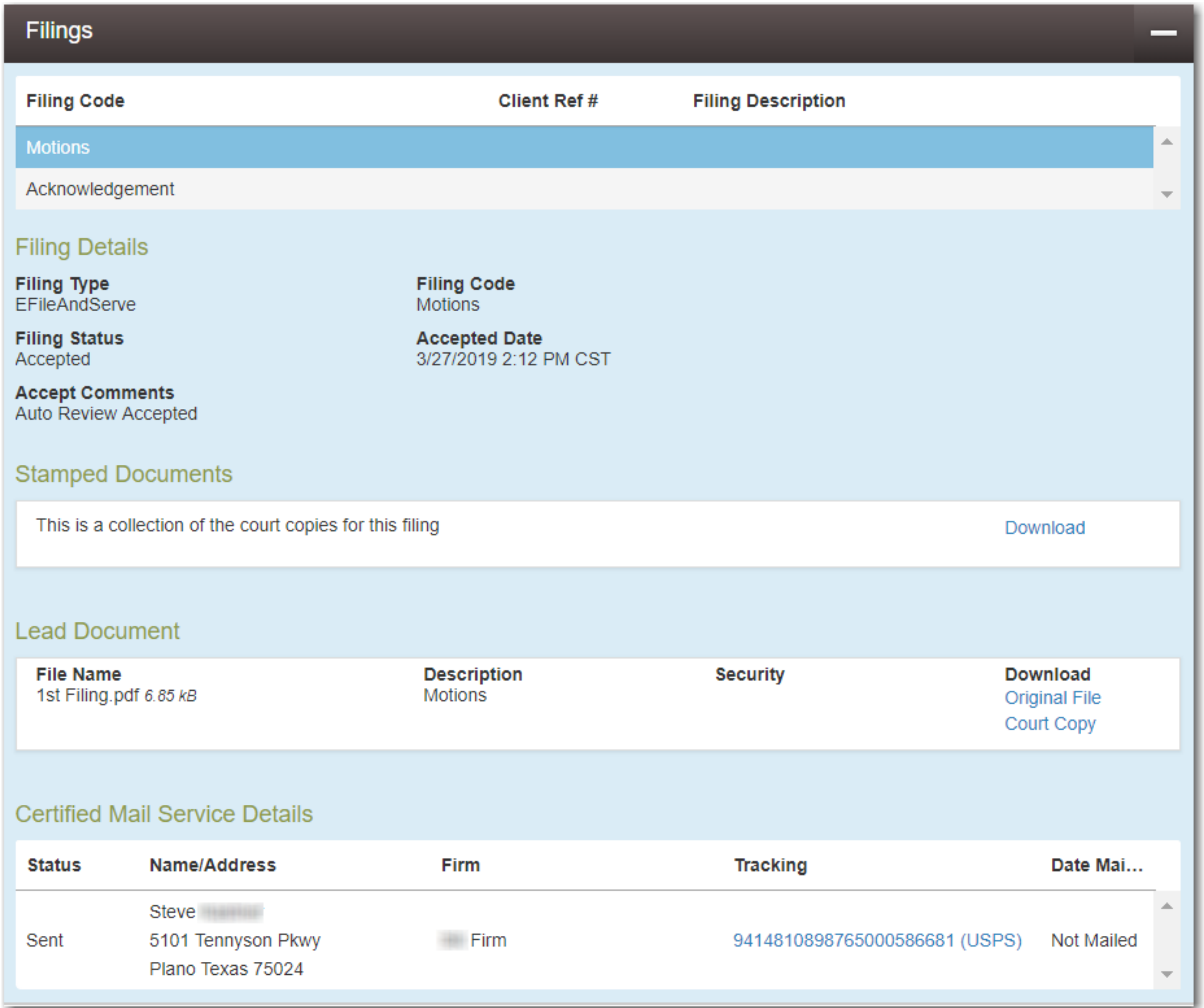


Figure 13.18 – Example of a Filings Section in the Envelope Details

5. In the **Certified Mail Service Details** section, you can view the information related to the specified certified mail. If you want to track the status of the certified mail, click the link in the **Tracking** column.

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

6. 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 Motion Type Information in Envelope Details

You can view a selected Motion Type in the envelope details.

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

To view the motion type information in the envelope details, perform the following steps:

1. From the **Actions** drop-down list on the *Filer Dashboard* page, select **Filing History**.

The *Filing History* page is displayed.

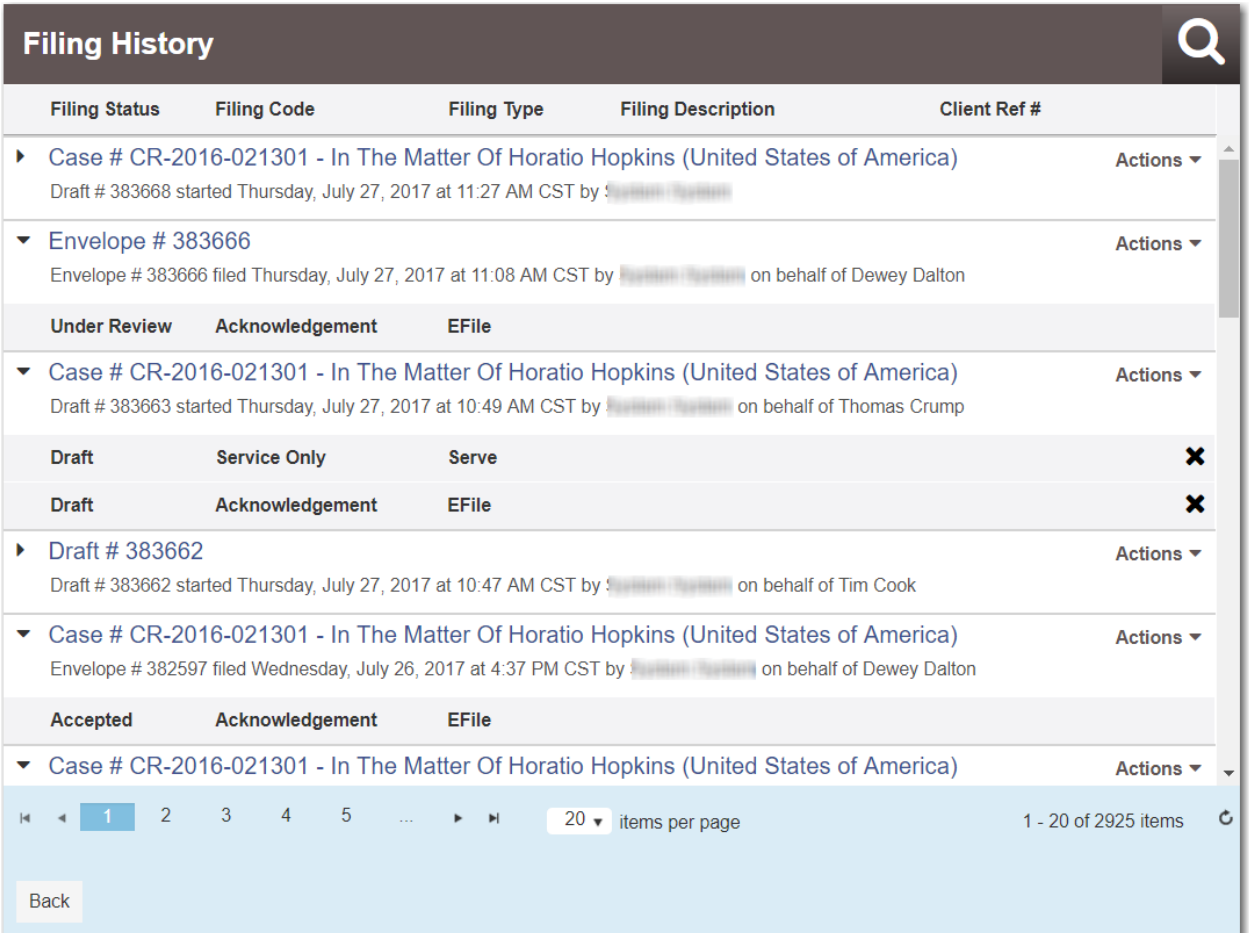


Figure 13.19 – Filing History Page

2. Locate your case on the *Filing History* page.
3. From the envelope **Actions** drop-down list, select **View Filing Details**.

   The *Envelope* page is displayed.
4. Navigate to the **Filings** section. Expand the view if necessary.

   The filing details are displayed in the **Filings** section.

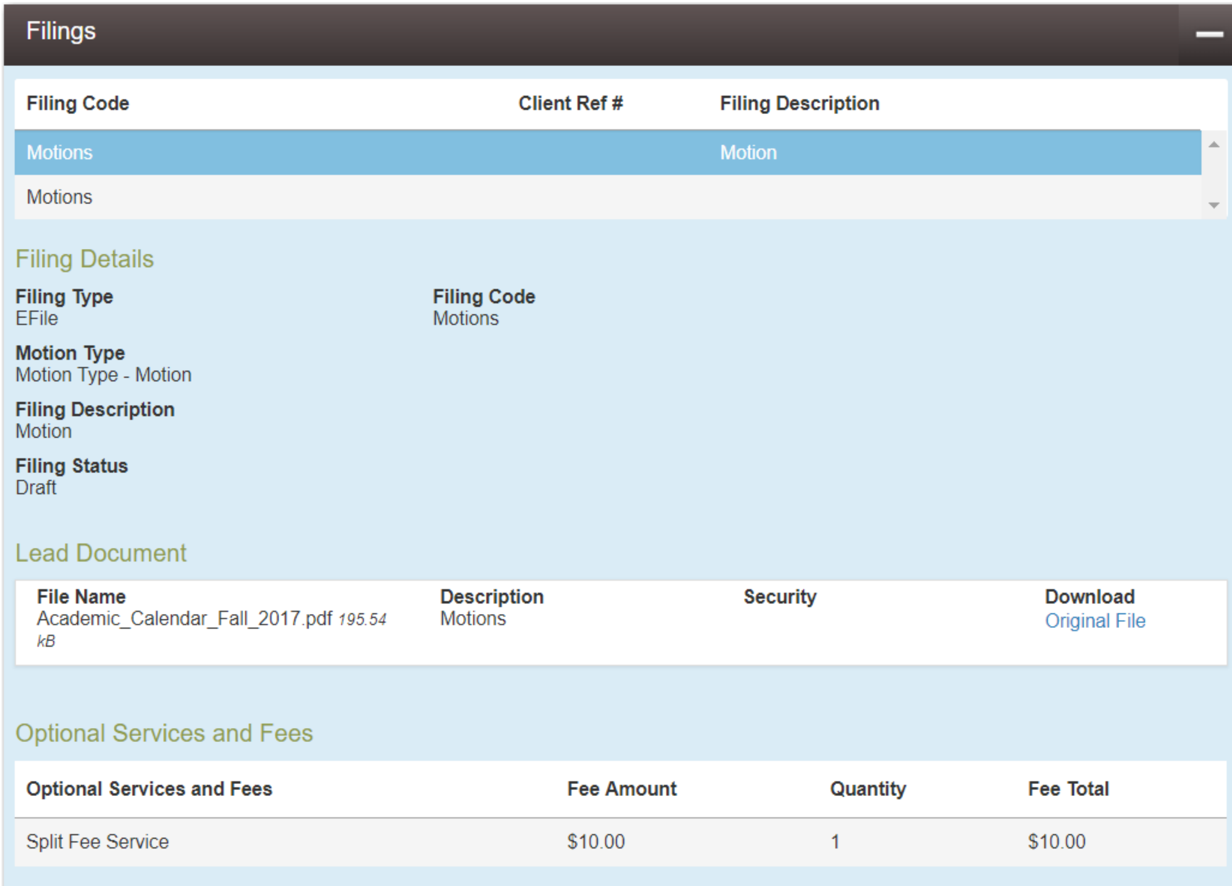


Figure 13.20 – Example of Filing Details in a Filings Section

Resuming the Filing Process

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

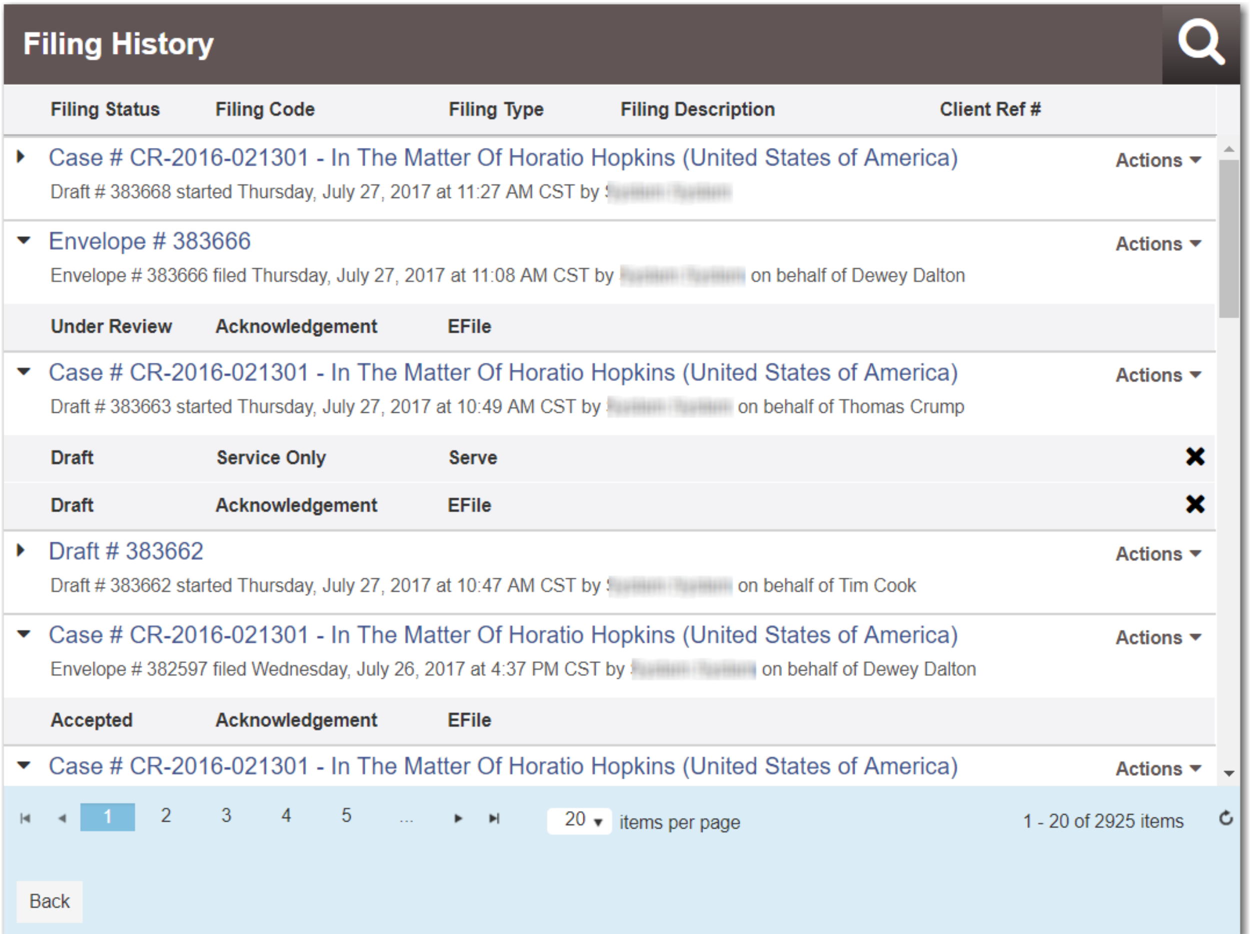


Figure 13.21 – Filing History Page

To resume the filing process on the case, perform the following steps:

1. Select the draft on the *Filing History* page for which you want to resume a filing.
2. From the **Actions** drop-down list for the specified draft, select **Resume Draft Envelope**.

   The envelope is displayed at the location where you left off.
3. Continue completing the fields for this filing.

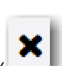
Canceling a Filing

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

To cancel the filing, perform the following steps:

1. On the *Filing History* page, locate the filing that you want to cancel.

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

2. Pause the cursor over the Cancel icon (), and click the icon.

Note: Ensure that you want to cancel the filing before you click the icon. Once you click the icon, the filing is canceled immediately, and you cannot undo the action.

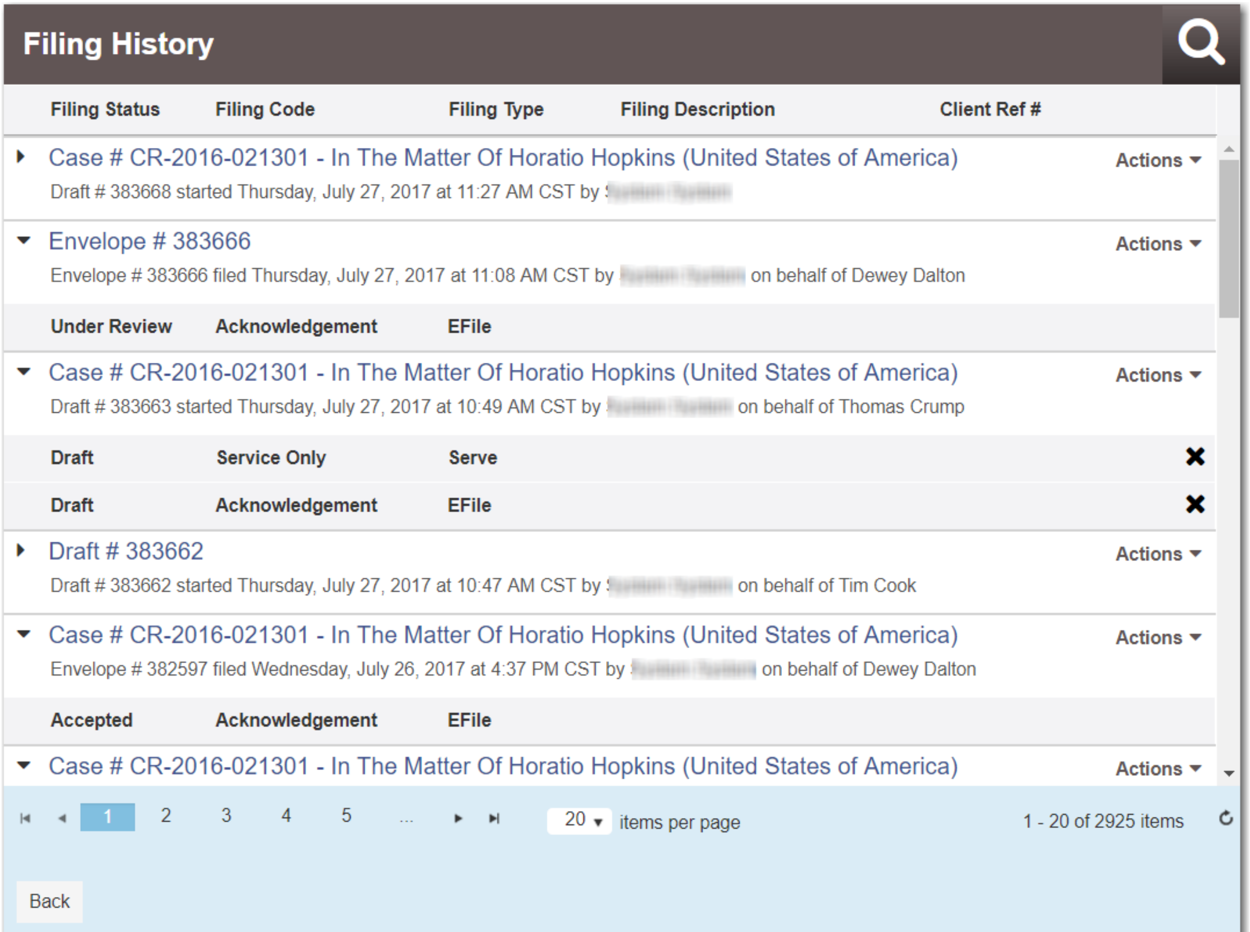


Figure 13.22 – Filing History Page – Canceling a Filing

14 Bookmarks

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

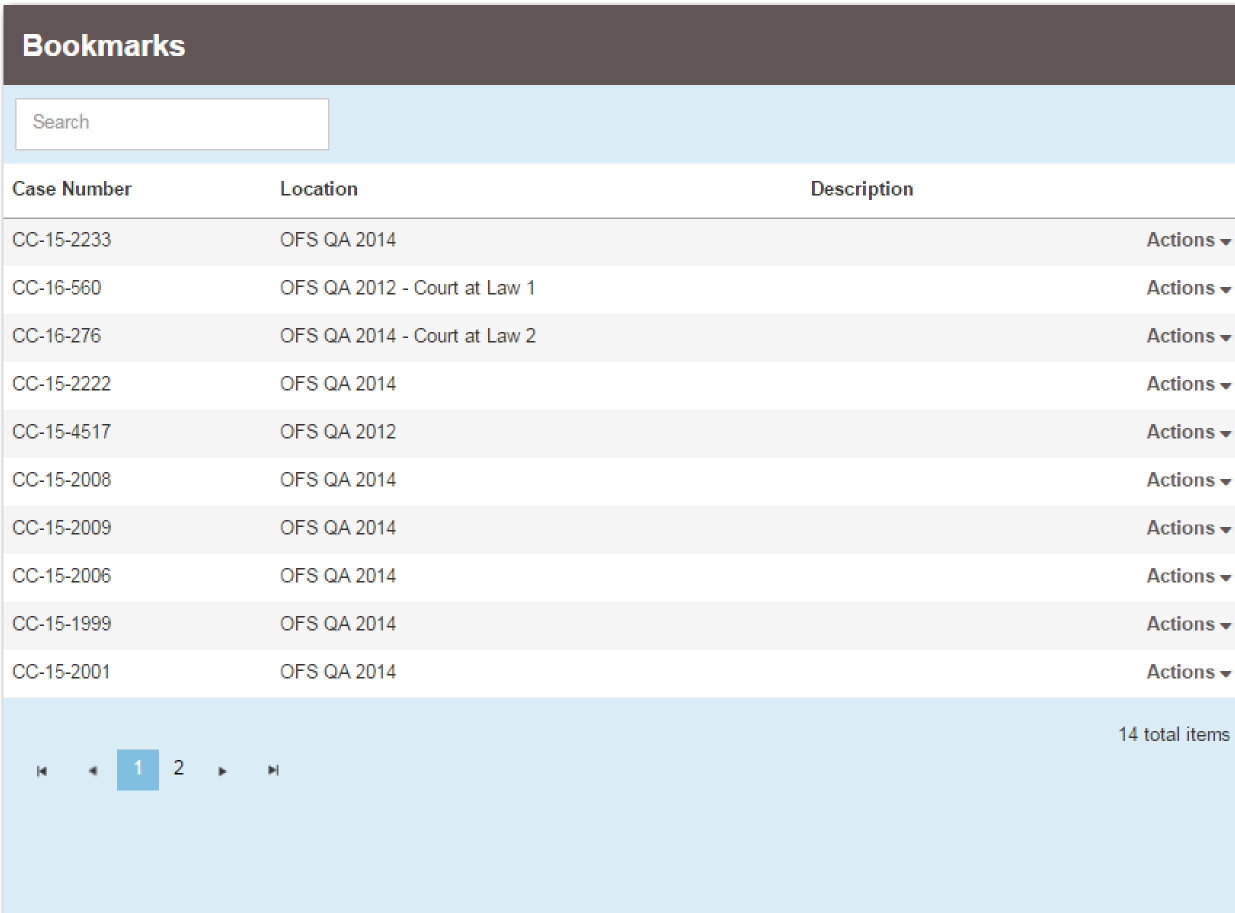


Figure 14.1 – Bookmarks Page

View Bookmarked Cases

You can view a list of your bookmarked cases, file into an existing case, remove the bookmarked case from the case list, and add service contacts to the case using the *Bookmarks* page.

Filing into an Existing Case

To file into an existing case, select **File Into Case** from the **Actions** drop-down list on the *Bookmarks* page.

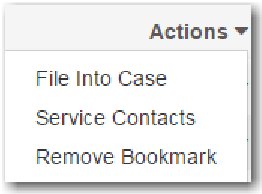


Figure 14.2 – Bookmarks Actions Drop-Down List

Removing a Case from the Bookmark List

You can remove a case from the bookmarked case list by selecting **Unbookmark this case** from the **Actions** drop-down list on the *Bookmarks* page.

Add Service Contact to the Case

You can add service contacts to the selected case by selecting **Service Contacts** from the **Actions** drop-down list on the *Bookmarks* page. The *Service Contacts* dialog box for the specified case is displayed. From here, you can add a service contact from the firm's service contact list, add a service contact from the public list, or create a new service contact.

15 Reports

Topics covered in this chapter

Creating a Financial Reconciliation Report

The Financial Reconciliation Report contains a report at the envelope level that is designed to help filers reconcile their filing fees to their credit card statements.

To run a financial reconciliation report, perform the following steps:

1. From the **Actions** drop-down list, select **Reports**.

   The *Reports* page is displayed.

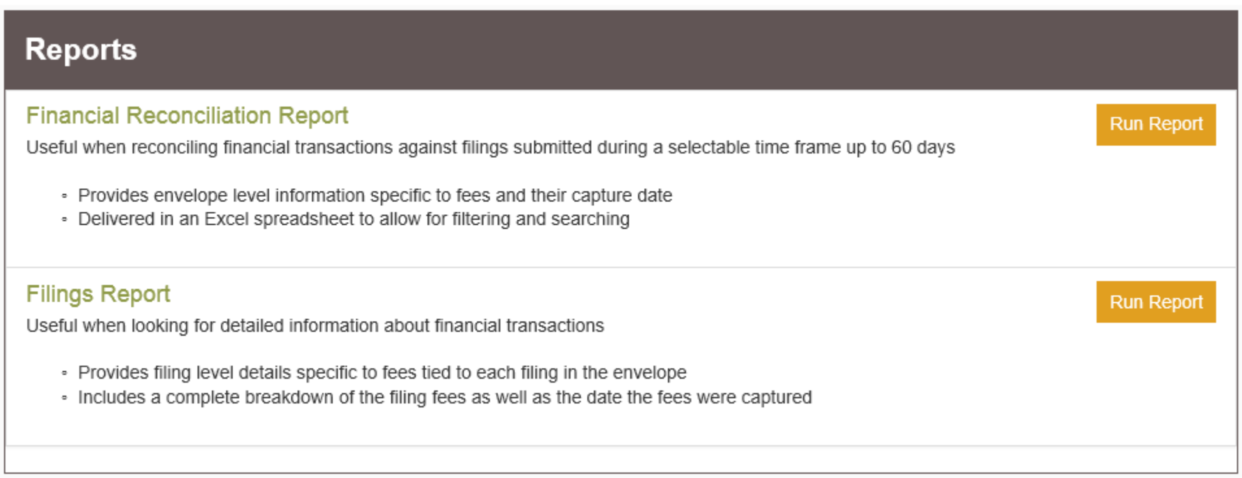


Figure 15.1 – Reports Page

2. In the **Financial Reconciliation Report** panel, click 

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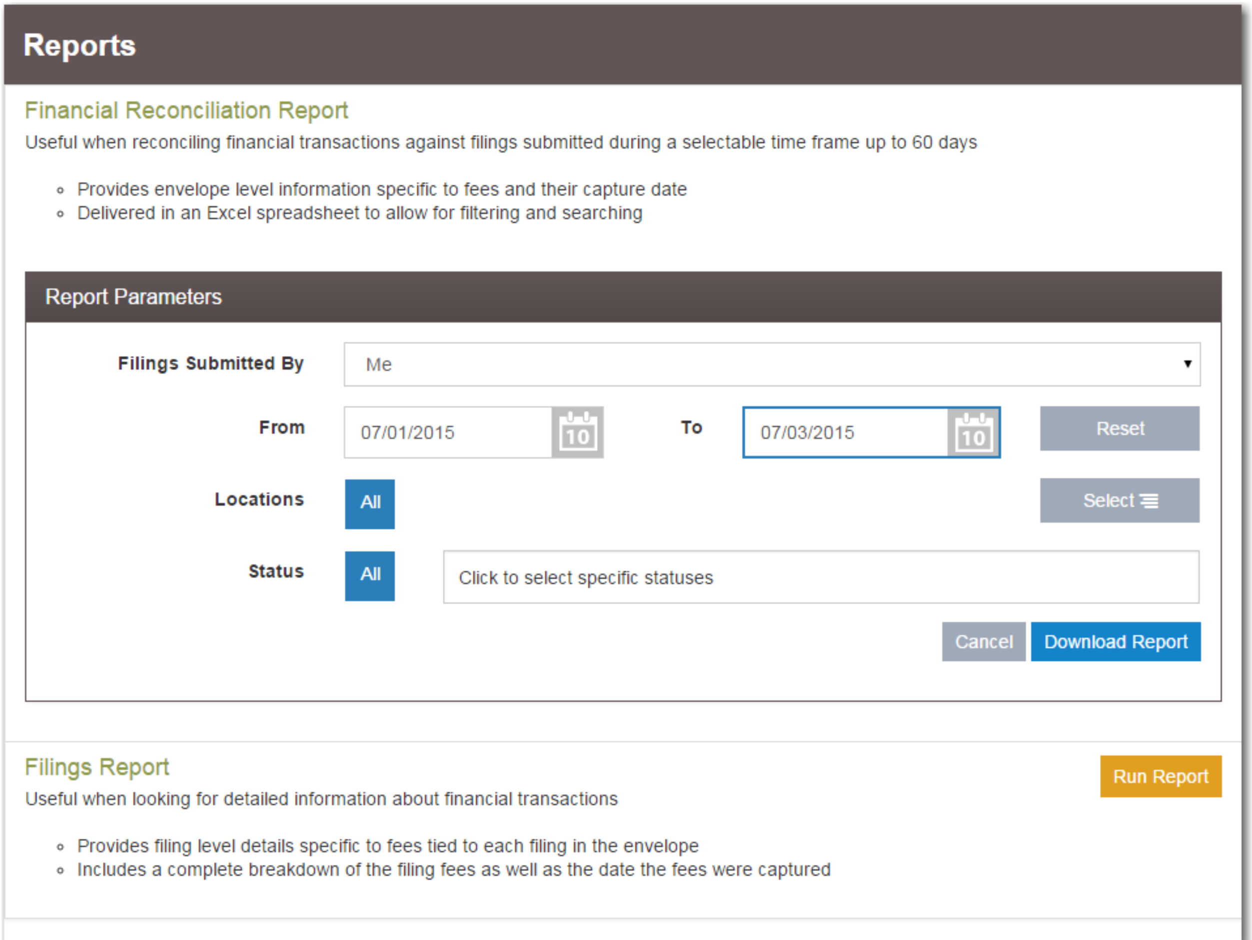


Figure 15.2 – Report Parameters Panel of Reports Page for Financial Reconciliation Report

3. In the **Report Parameters** panel, enter the report information in the fields provided:

   a. From the **Filings Submitted By** drop-down list, select either **Me** or **My Firm**.

   b. In the **From** and **To** date fields, click  to select the report date range from a calendar. Or, type the dates manually (for example, `7/31/2015`).

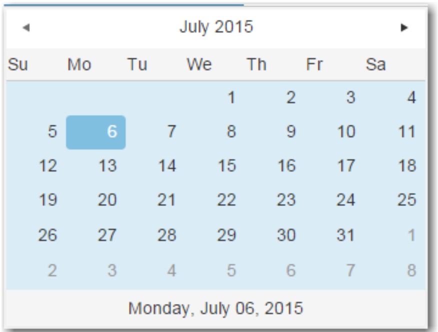


Figure 15.3 – Filter Date Calendar

c. In the **Locations** field, select **All** (default), or select one or multiple locations from the list.

d. In the **Status** field, select **All** (default), or select one or multiple statuses from the list.

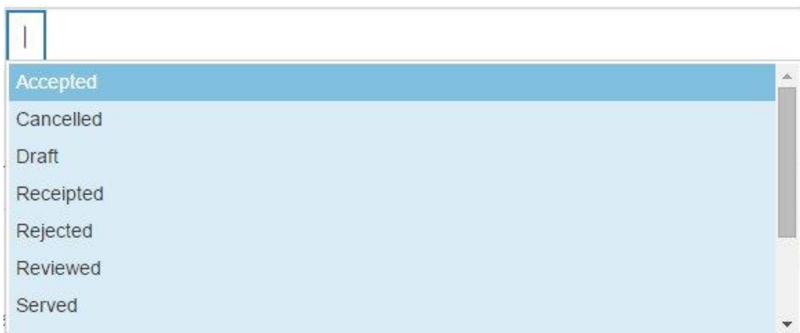


Figure 15.4 – Status Field Drop-Down List

4. Click  to run the report, or click  to cancel the action.
5. Open the report in Microsoft Excel, or save the report to another location.

Creating a Filings Report

The Filings Report is a detailed look into every filing, filing status, and fee associated with the filings you or your firm performed.

To create the Filings Report, perform the following steps:

1. From the **Actions** drop-down list, select **Reports**.

   The *Reports* page is displayed.

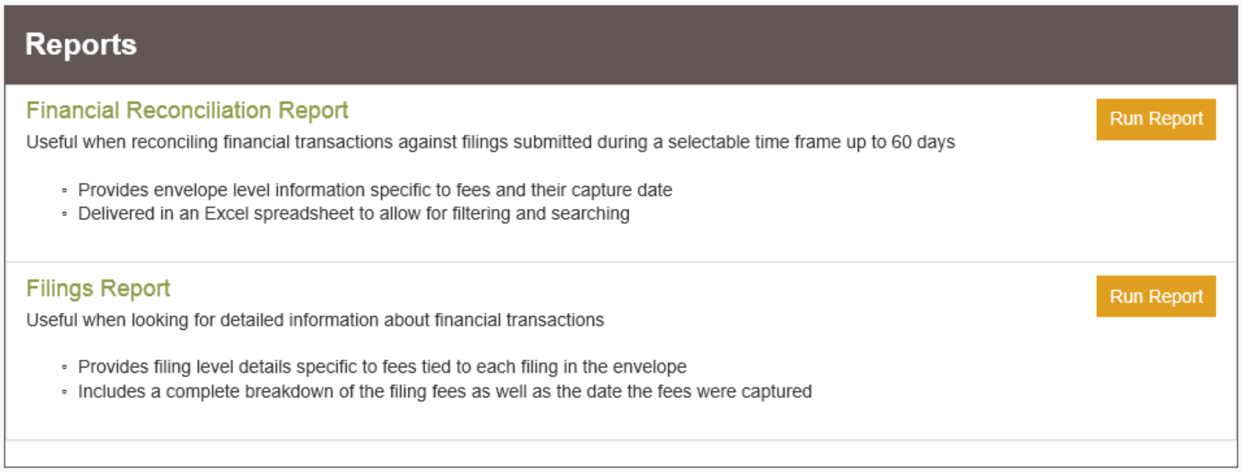


Figure 15.5 – Reports Page

2. In the **Filings Report** panel, click Run Report.

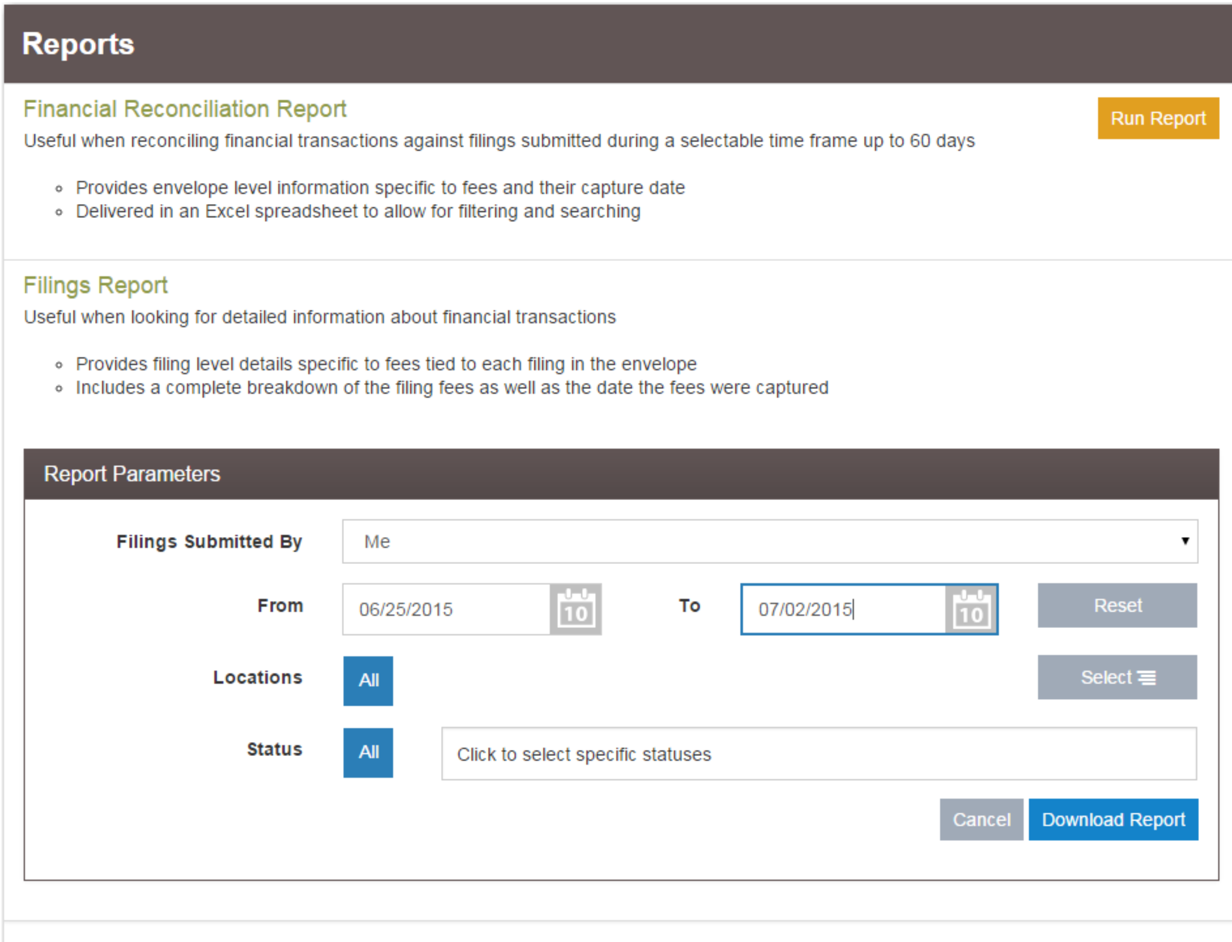


Figure 15.6 – Report Parameters Panel of Reports Page for Filings Report

3. In the **Report Parameters** panel, enter the report information in the fields provided:
   a. From the **Filings Submitted By** drop-down list, select either **Me** or **My Firm**.
   b. In the **From** and **To** date fields, click  to select the report date range from a calendar. Or, type the dates manually (for example, `7/31/2015`).

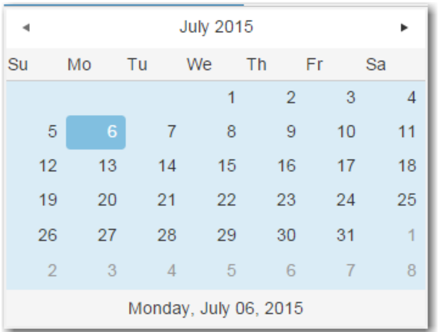


Figure 15.7 – Filter Date Calendar

c. In the **Locations** field, select **All** (default), or select one or multiple locations from the list.

d. In the **Status** field, select **All** (default), or select one or multiple statuses from the list.

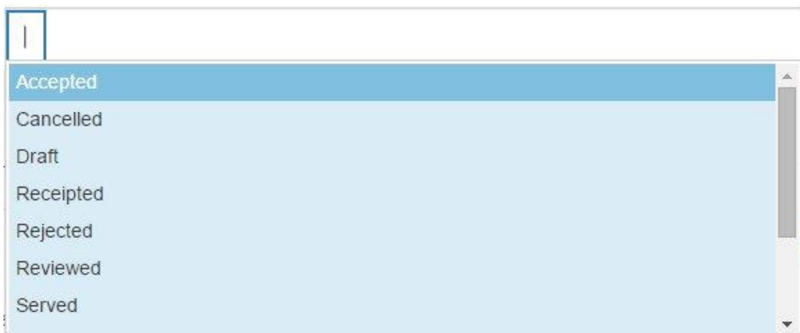
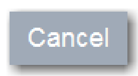


Figure 15.8 – Status Field Drop-Down List

4. Click 

 to run the report, or click 

 to cancel the action.
5. Open the report in Microsoft Excel, or save the report to another location.

16 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.