



# Odyssey® File & Serve™ HTML5 Quick-Reference Guide

Release 2019.1

## Registration Options

Three registration options exist in Odyssey File & Serve.

### Register for a New Firm Account

This account is perfect for the following users:

- Attorneys
- Firms with multiple filers
- Solo attorney practitioners

Before you register for a new firm account, please check with your firm to ensure that an account has not already been created. If a firm account has already been created, ask your Firm Administrator to invite you to join the firm.

### Join a Firm

To join a firm, you must request an invitation from your Firm Administrator. You cannot join the firm by going to the regular registration page on the *Home* page.

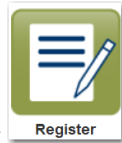
### Register for an Individual Filer Account

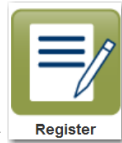
This account is perfect for the following users:

- Pro se filers
- Process servers
- Landlords/tenants


## Registering for Odyssey File & Serve

To register for Odyssey File & Serve, perform the following steps:



1. From the *Home* page, click .
2. Complete the required fields, which are outlined in red: **First Name**, **Last Name**, **Email Address**, **Password**, **Security Question**, and **Security Answer**.

Next

3. Click .
4. On the next page, select the appropriate registration option.

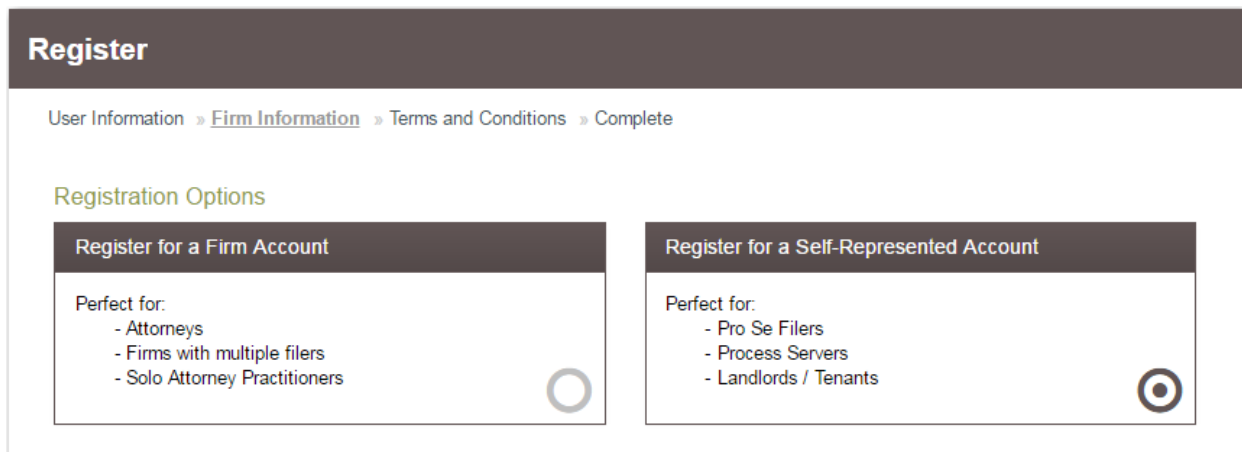
A screenshot of a web page titled "Register". At the top, there is a dark grey header with the word "Register" in white. Below the header, a breadcrumb trail reads "User Information > Firm Information > Terms and Conditions > Complete". The main content area is titled "Registration Options" and contains two side-by-side boxes. The left box is titled "Register for a Firm Account" and lists "Perfect for:" followed by three bullet points: "- Attorneys", "- Firms with multiple filers", and "- Solo Attorney Practitioners". It has a radio button at the bottom right. The right box is titled "Register for a Self-Represented Account" and lists "Perfect for:" followed by three bullet points: "- Pro Se Filers", "- Process Servers", and "- Landlords / Tenants". It has a radio button at the bottom right, which is currently selected.

Figure 1.1 – Register Page

5. If you are registering for a new firm account, click the option for a firm account.  
**Note:** If you want to join a firm, you cannot register to join a firm from the *Home* page. Instead, you must request an invitation email from your Firm Administrator. After you receive the invitation email, click the link in the body of the email. You will be guided through the registration process including joining a firm.
6. If you are registering for an individual filer account, click the option for a self-represented account.
7. Complete the rest of the required fields as directed.

## 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.

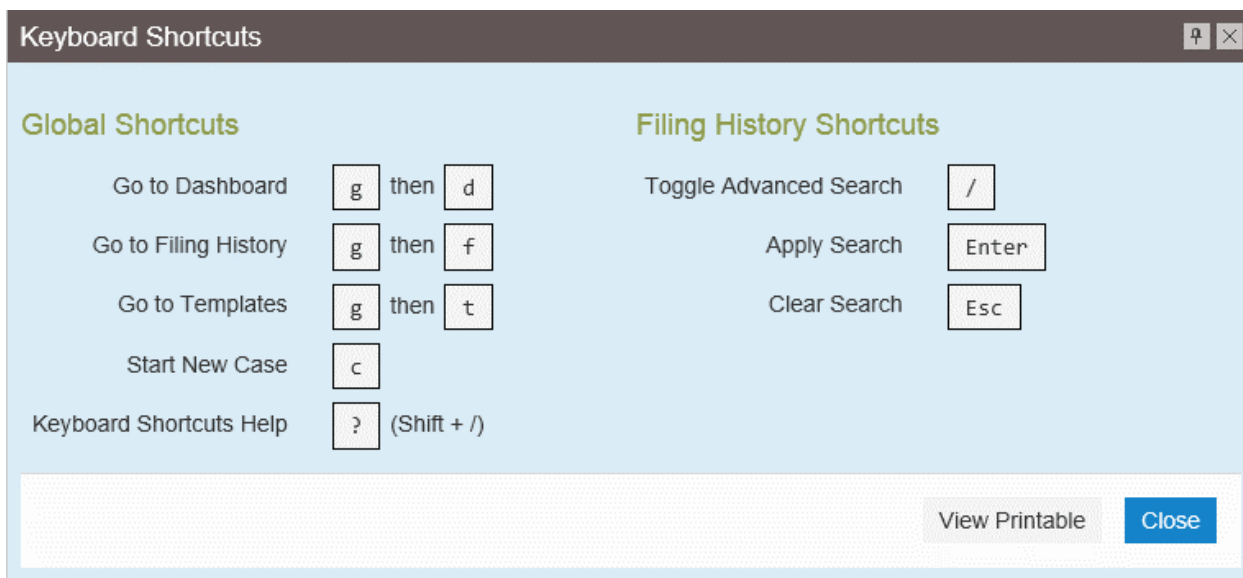


Figure 1.2 – Keyboard Shortcuts Window

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.

## Filing a New Case

Prior to filing a new case, you must set up a payment account.

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.

**Save Changes**

- 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.

- 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.

**+ Add Case Cross Reference Number**

- 6. Click

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

- 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.

**Save Changes**

- 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.

## 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. If you are the party, select the **I am this party** check box. Or to indicate whether the party is a business or agency, select the **Party is a Business/Agency** check box.
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.
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 you are viewing filing details.

8. 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.

9. 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.

10. 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 Filing Details

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

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.

**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.

- 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.

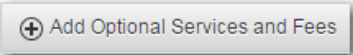
- k. Type a name for the lead document in the **Description** field.

**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 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.

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

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

- o. Select the appropriate option from the **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.

- 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.

- r. Add more optional services if you want.

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

**i 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.

s. When you are done adding optional services, click

**Save Changes**

**i 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.

**i 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.

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

**i 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.

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

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

d. 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.

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





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.



**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 , review the filing for accuracy. If you need to make any changes, click  to return to the previous page. Make any necessary corrections, and then click  again.
7. When you are satisfied with the information in your filing, click .  
A new envelope of your filing is included on the *Filing History* page.

## Creating 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**.
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.
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 **Service Contacts** list.

6. Click , and then continue with the rest of the filing creation.

## Creating a Service Only Filing

To create a Service Only filing, perform the following steps:



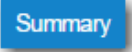
1. Select an existing case that you want to file into.
2. Follow one of the methods for filing into an existing case (that is, from the *Filing History* page, from the *Bookmarks* page, by clicking **File into Existing Case** in the **New Filing** section on the *Filer Dashboard* page, or from the **Actions** 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.
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.

- Click .
- Add the service contacts that you want to receive a Service Only filing in the **Service Contacts** section.
- If applicable, select the payment account from the **Payment Account** drop-down list.
- If applicable, select the party that is responsible for paying the fees from the **Party Responsible for Fees** drop-down list.
- Select the filer type from the **Filer Type** drop-down list.
- Click  to stop working on your filing and resume work at a later time, or click  to review a summary of your filing.

## 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:

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

The *Filing History* page is displayed.

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

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

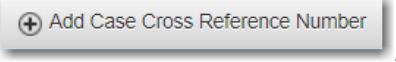
The **Case Cross Reference Number** section is displayed after the **Case Information** section.

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

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

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

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

- Click .

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

- 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.
- If you want to remove a case cross reference that you previously entered, select **Remove** from the **Actions** drop-down list.



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

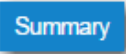

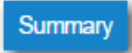
The **Party Information** fields are already populated since this is an existing case. You can immediately view the parties associated with the case.

10. Complete the filing details in the **Filings** section.

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

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

- Click  to stop working on your filing and resume work at a later time.
- Click  to review a summary of your filing.

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

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

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.

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**.

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.

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.

6. Click .

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

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.


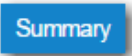
9. When you are done adding all of the case cross reference numbers to the filing, click  .

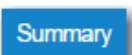

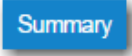
The **Party Information** fields are already populated since this is an existing case. You can immediately view the parties associated with the case.


10. Complete the filing details in the **Filings** section.

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

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

- Click  to stop working on your filing and resume work at a later time.
- Click  to review a summary of your filing.

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

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

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.

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 this 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.

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

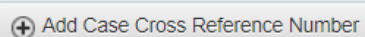
The **Case Cross Reference Number** section is displayed after the **Case Information** section.

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

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.



9. Click

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

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.



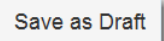

12. When you are done adding all of the case cross reference numbers to the filing, click

The **Party Information** fields are already populated since this is an existing case. You can immediately view the parties associated with the case.

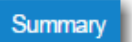
13. Complete the filing details in the **Filings** section.

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

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

- Click  to stop working on your filing and resume work at a later time.
- Click  to review a summary of your filing.

16. If you clicked , review the filing for accuracy. If you need to make any changes, click  to

return to the previous page. Make any necessary corrections, and then click  again.

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

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