



# **Odyssey<sup>®</sup> File & Serve**

## **Frequently Asked Questions – State of Oregon**

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# 1 State of Oregon – Frequently Asked Questions

## Topics Covered in this Chapter

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- ◆ E-filing
- ◆ Fees
- ◆ E-serving
- ◆ Format Errors
- ◆ Technical Support

## General

### Do I have to register to use File & Serve?

Yes, all users must register prior to using File & Serve. It is free to sign up for an account, all you need is an email address.

### What is the role of the Firm Administrator?

The Firm Administrator registers the firm and is responsible for setting up and maintaining all information for system users, credit card accounts, and attorneys at the firm.

When a new firm is registered, all users added to that firm are associated with the firm. If a firm has multiple locations, those users can be added to the original firm, but Tyler recommends that each location registers his or her location as a new firm with its own Firm Administrator. In this way, each firm's users from each location will only see their specific filings for their specific location; otherwise, users will see instead of all filings under the original firm.

### Do independent users need a Firm Administrator to register for File & Serve?

No, independent users do not need a Firm Administrator to register to use File & Serve. Independent users can register to use File & Serve without the assistance of a Firm Administrator. When registering you can choose between a firm account and an individual account.

### How can I get a user name and password?

You can get a user name and password by registering to use File & Serve.

Perform the following steps to register:

1. Go to your File & Serve home page.
2. Click the **Register Now** link.
3. Complete the **File and Serve Registration Wizard**.
4. Check your e-mail inbox for an e-mail confirmation that contains your user name and password.
5. Copy and paste the password received in the e-mail confirmation when logging into File & Serve for the first time.

**i Note:** If you cannot self-register to use File & Serve, contact your Firm Administrator to get a user name and password.

## What if I forget my user name or password?

Perform the following steps to reset your password:

1. Go to your File & Serve home page.
2. Click the **Forgot Password?** link on the login screen.  
The **Reset Password** dialog box opens.
3. Type your e-mail address in the field provided.
4. Click the **Next** button.
5. Type the answer to your security question in the field provided.
6. Click the **Ok** button to close the dialog box.

This action takes you back to the login screen.

Your password is reset, and a temporary password is sent to your e-mail address. Use the temporary password to log in and then change your password to one of your preference.

**Note:** Contact your Firm Administrator if you are unable to reset your password.

## Does my password expire or need to be changed periodically?

No. Currently user passwords do not expire, and there is no requirement that users must periodically change their passwords.

## Is support available for File & Serve?

Yes, Technical Support is available 7 a.m. to 9 p.m. CT, Monday through Friday.

Contact Tyler Technical Support at 800.297.5377, or send an e-mail to [efiling.support@tylertech.com](mailto:efiling.support@tylertech.com). Assistance is also available online through [Support Chat](#).

**Note:** Support may ask to assist you by sharing your screen using [GoToAssist](#).

## Is documentation available for using File & Serve?

Yes, the File & Serve User Guide, Quick Reference Guide, and Frequently Asked Questions (FAQs) are available for your reference on the website.

You can access the documentation on the File & Serve home page, or by clicking the **Info** link at the top of the screen when you are logged into the site.

## Is training available for using File & Serve?

Yes, Tyler Technologies offers regularly scheduled online training sessions for File and Serve. To access the training schedule, click the [Web Conference Training Sessions](#) link under the **Train** section on the portal home page. Tyler, not the Oregon Judicial Department, provides the training.

**Note:** Tyler trainings are not Oregon specific.

## What are the computer requirements for using File & Serve?

File & Serve is a web-based system that is designed to be compatible with typical office workstations. No special setup or software installations are required to use File & Serve. See the recommended computer settings below.

**Note:** First-time users of File & Serve may be prompted to download and install Microsoft® Silverlight.

The recommended settings for your workstation are as follows:

- **Web Browser Requirements:** File & Serve is supported by current versions of the Windows operating system using Firefox or Internet Explorer 7, 8, 9, or 10.
- **Connection Requirements:** High-speed connection is recommended.
- **Minimum Screen Resolution:** For best results, a setting of 1024x768 is recommended.

## Are there court rules that apply to e-filing using File & Serve?

Yes, [Uniform Trial Court Rule Chapter 21](#) sets out court rules for electronic filing and service by electronic means.

## If I am a self-represented litigant, can I use the File & Serve system?

Yes, self-represented litigants can register as either an "independent user" or a "firm administrator." There is no longer a requirement that a firm within File & Serve must have an attorney.

## Can File & Serve be used to initiate cases or to file into existing cases?

Yes, File & Serve can be used to initiate cases, electronically file into existing cases, or electronically serve documents. Both attorneys and support staff can use the system to complete these tasks under their own user names. UTCR 21.070 sets out a list of documents that, due to technical or other reasons, cannot be electronically filed and instead must be conventionally filed.

## When can I use File & Serve?

File & Serve is available 24 hours a day, seven days a week. **Note:** The system may be temporarily offline from time to time for maintenance purposes. Consult your local court rules for the court review timelines and schedules.

## Will I ever be automatically logged out of File & Serve?

As long as you are entering data, submitting forms, or reviewing case information in File & Serve, you will not be automatically logged out. However, File & Serve will automatically log you out after a period of system inactivity for Internet security reasons.

## Why am I having difficulty viewing the entire web page on my screen?

Difficulty viewing the entire web page may be a screen resolution issue. To resolve this issue, perform the following steps:

1. Open **Properties** on your desktop.
2. Select the **Settings** option.
3. Under **Screen Resolution** or **Screen Area**, slide the bar to select 1024x768 pixels.
4. Click **OK**.

## Clearing the Internet Explorer Browser History

As you browse the web, a lot of the information regarding the sites you've visited is stored on your computer. This information is your browser history. If you do not want to keep a history of the sites you have visited, you can clear your browser history.

You must have an Internet Explorer browser to perform this procedure.

To clear the Internet Explorer browser history:

1. Open your Internet Explorer browser.
2. Select **Tools** on the toolbar on the top of your screen.

The drop-down list for **Tools** displays.

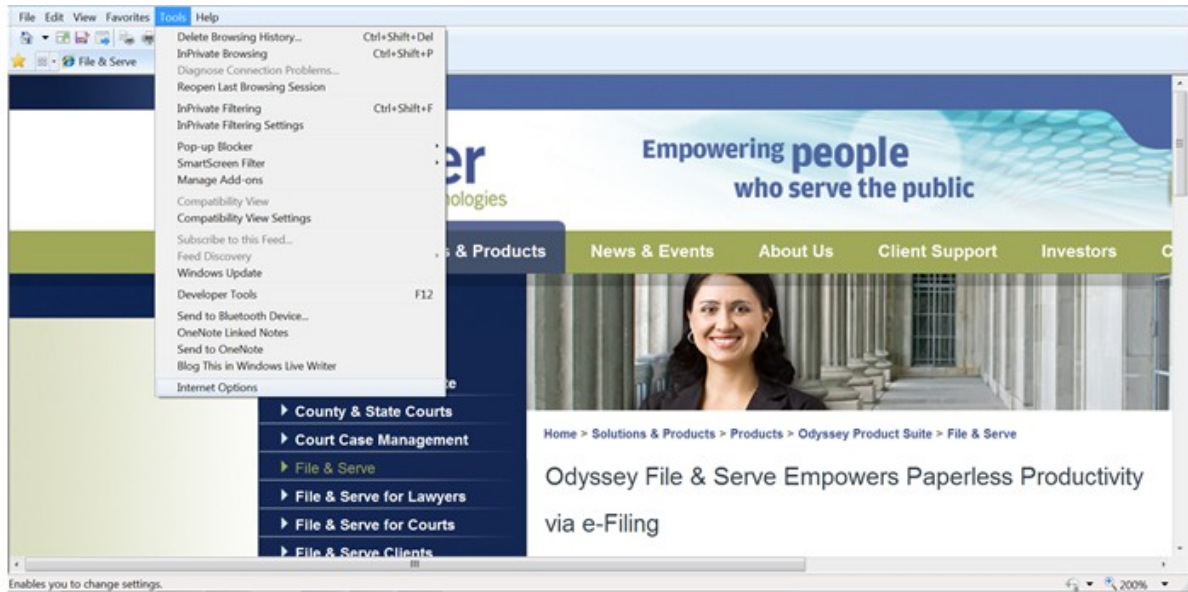


Figure 1.1 – Selecting Tools Menu

3. Select **Internet Options** located at the bottom of the drop-down list.



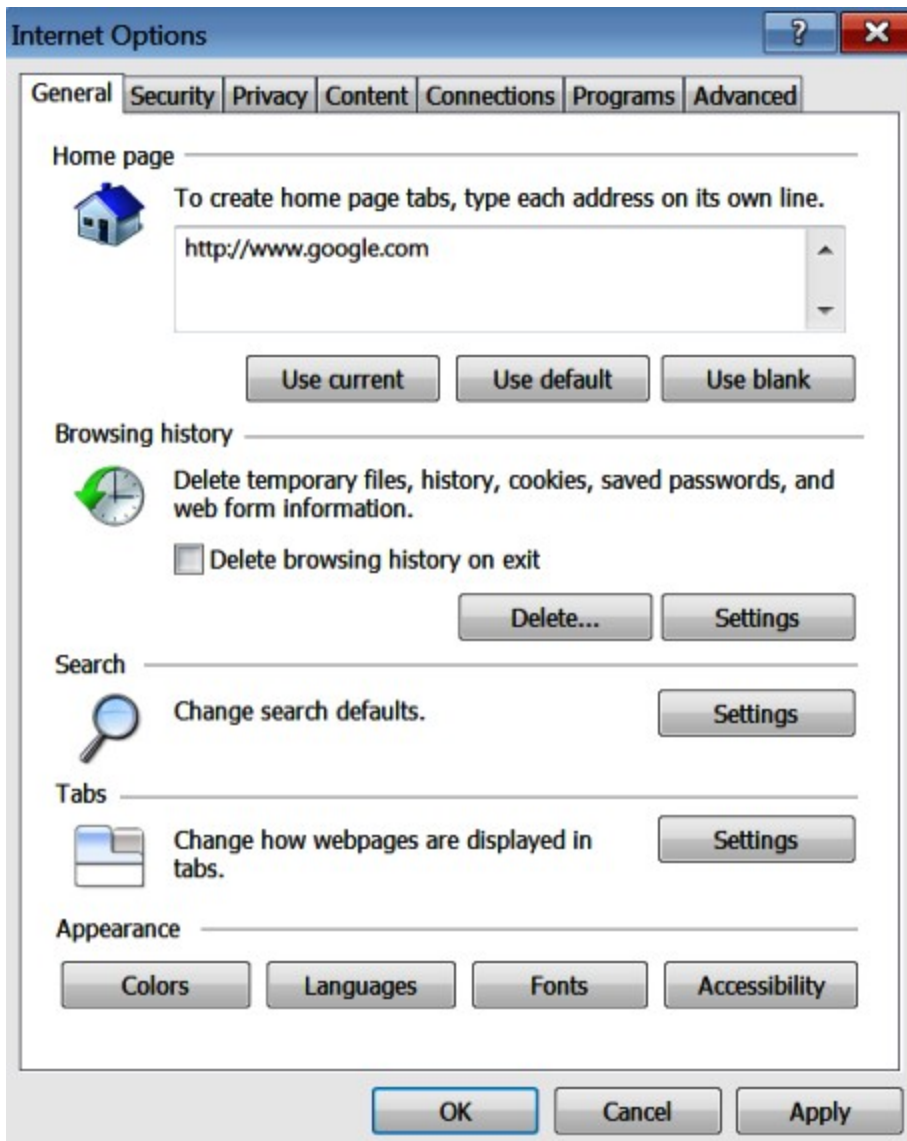


Figure 1.2 – Internet Options Window General Tab

4. Click the  button.

The **Delete Browsing History** window opens.

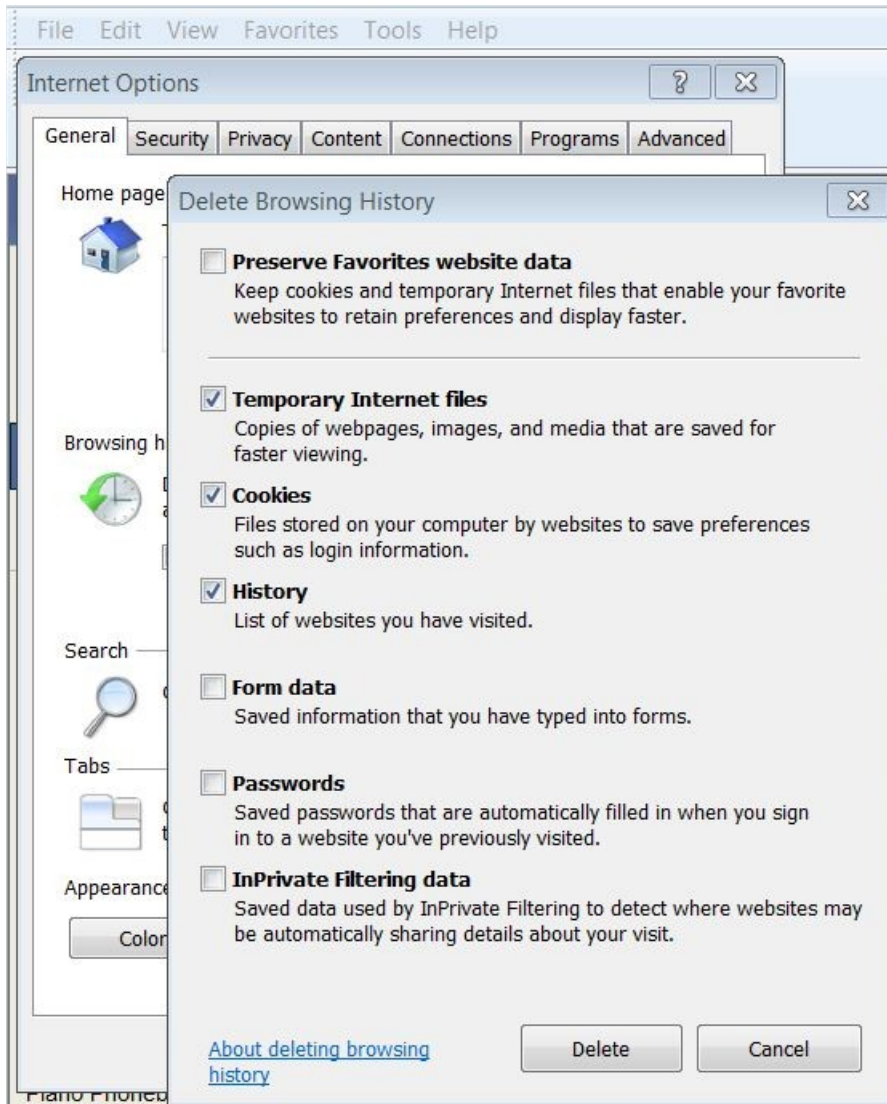
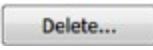



Figure 1.3 – Delete Browsing History Window

5. Select the following check boxes:
  - Temporary Internet files
  - Cookies
  - History
6. Click the  button.
7. Wait as the system deletes the browsing history.
8. Click the  icon to close the window.

## Clearing the Firefox Browser History

As you browse the web, a lot of the information regarding the sites you've visited is stored on your computer. This information is your browser history. If you do not want to keep a history of the sites you have visited, you can clear your browser history.

You must have a Firefox browser to perform this procedure.

To clear the Firefox browser history:

1. Open your Firefox browser.
2. Select the **FIREFOX** icon at the top of the window.

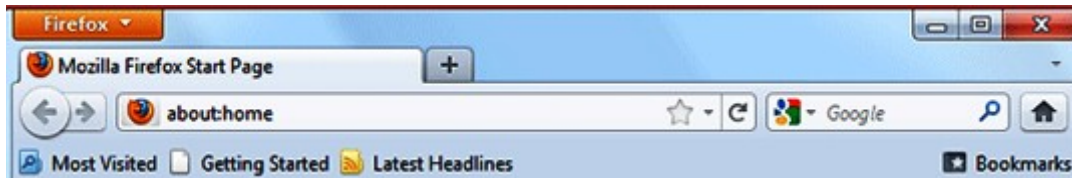


Figure 1.4 – Firefox Window

The options menu opens.

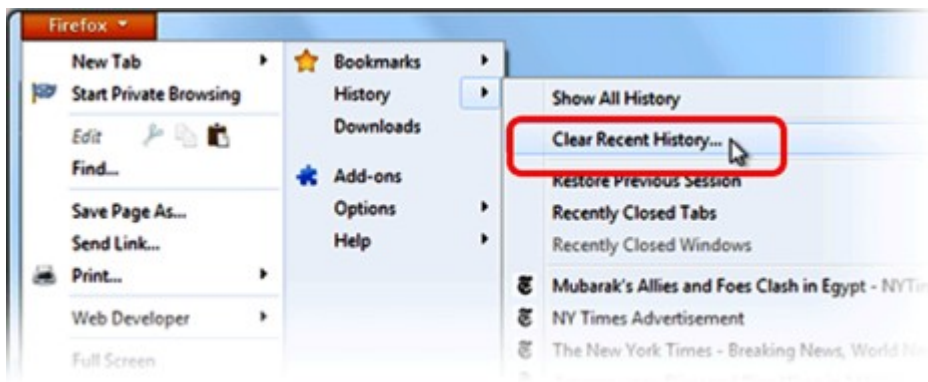


Figure 1.5 – History Options Menu

3. Select the **History** option.
4. Select the **Clear Recent History** option.

The **Clear All History** window opens.

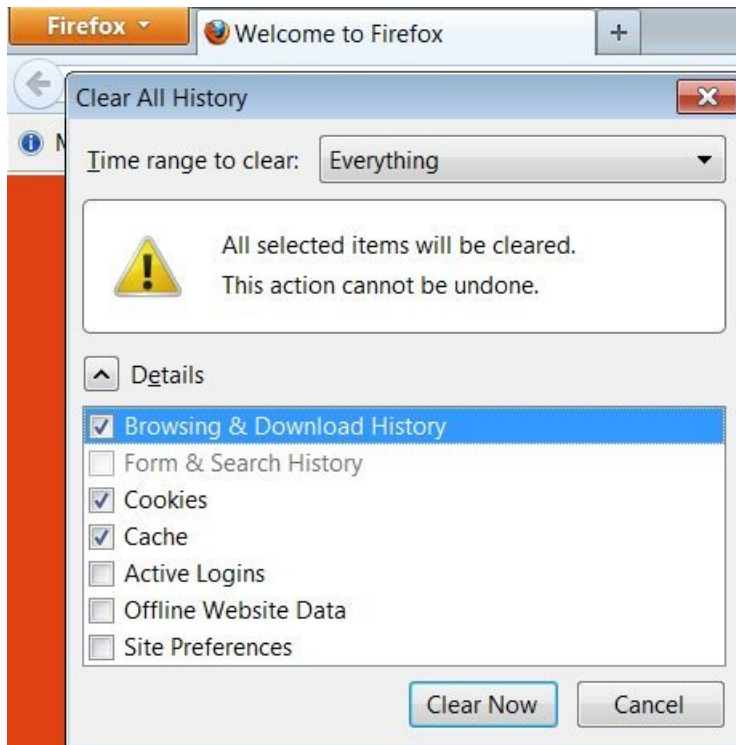


Figure 1.6 – Clear All History Window

5. Select **Everything** on the **Time range to clear:** drop-down list.
6. Select the following check boxes:
  - Browsing & Download History
  - Cookies
  - Cache

**Note:** The above options are the only check boxes that should be checked. De-select all the other check boxes in the Details window.

7. Click the  button to close the **Clear All History** window and to clear the browser history.

## E-filing

### What type of cases can I e-file with courts?

With the exception of the types of cases listed in UTCR 21.070(3), any type of case may be initially filed through File & Serve. You may e-file into any case once it has been created and you may e-File any document using File & Serve, except the documents listed in UTCR 21.070(3), and applications for fee waivers and deferrals.

### How do I determine the case type if I am initiating a new case through File & Serve?

If you are unable to determine the correct case type from the available drop-down choices, check the *Filing Code Quick Reference Guide* or contact your local court for assistance in determining the correct case type.

## What is an envelope?

An envelope is a filing submitted to the court. An envelope can contain one or more documents submitted to the court for the same case. File & Serve identifies filings by their envelope number.

## Is my e-filing automatically accepted when it is received?

No, the documents that were filed will be reviewed by a court clerk before they are accepted.

## What is the filed date of my e-filed document?

Once the court accepts the filing, the filed date is the date that the document was submitted to File & Serve for review. For more information please consult UTCR 21.080.

## How long are file-date-stamped documents available in my Filings queue?

File-date-stamped documents are available for six months.

## Will I receive a notification if the court rejects my e-filing?

Yes, you will receive a notification by email if your e-filing was rejected. This email will also contain the reason(s) for the rejection. Please consult UTCR 21.080(5) and the [OJD Standards for Electronic Filings in Circuit Courts Supplemental Guide for Users](#) for more information regarding rejections.

## If my e-filing is rejected and I resubmit the filing, what will the filed date be for my documents?

If the corrected filing is submitted within three days of receiving notification of the rejection, and you comply with the requirements of UTCR 21.080(5), the court may approve relation back of the filed date to the original submission date of the rejected filing. For more information please consult UTCR 21.080(5).

## How do I enter the case number to search when searching for a case that I have filed using File & Serve?

To search for a case in File & Serve, select the court where the case is located and type the case number exactly as it was given to you by your local court, with the two-digit year, the two-digit letter case type, and the five-digit case number. For example, 13CR00001. For the old site, the search case field located in the upper-right corner of your screen. For the H5 site, select File into an Existing Case from the Filer Dashboard.

## How can I view a case filed more than 30 days ago?

Filter the case listing by entering the date range in the **Filings** queue to view a case filed more than 30 days ago.

## What document formats does File & Serve accept?

File & Serve only accepts documents in PDF or PDF-A formats.

## Can scanned documents be submitted in color?

Yes, File & Serve will accept color documents. However, the preferred business process is to scan the documents in black and white.

## Can I file multiple documents in one transaction?

Yes, if all of the documents pertain to the same case, multiple documents can be submitted together by selecting the **Add Another Filing** option. The documents will be submitted to the court in a single File & Serve envelope.

## I have several documents to submit. What should I do?

Documents and their incorporated attachments (exhibits, affidavits, declarations, etc.) should be submitted as a single PDF document (see UTCR 21.040(1) and (2)). There are two exceptions to this rule:

1. Any document requiring the court's signature (such as a proposed order or proposed judgment) must be submitted as its own PDF document in the same envelope as its supporting documents.
2. Any document that is confidential (such as a confidential information form) must be submitted as its own PDF document in the same envelope as the other documents that are meant to accompany the document (such as a petition for dissolution).

## What is the maximum file size that can be electronically submitted?

The file size may not exceed 25 MB per document. Documents greater than 25MB must be broken down and submitted as separate documents (within the same envelope) that do not exceed 25 MB.

Each document should be submitted in order using the same filing code. The filer shall indicate which part of the whole document that the filed document represents (1 of 3, 2 of 3, 3 of 3) within the Filing Comments field.

Please breakdown the document at logical points to ensure ease of use for judges viewing the documents electronically. See UTCR 21.040.

## What if I need to withdraw an e-filing?

After a filing has been submitted but before the court's review has begun, a **Cancel** button is available for that filing in your **Filings** queue.

As long as the **Cancel** button is present, the filing has been submitted by File & Serve but not yet been reviewed by the court. If the **Cancel** button is not available, contact your local court clerk's office.

## Do I have access to the documents that I file in the system?

Yes, by using the **My Filings** feature located on the **Filings** tab, you can find and view information concerning electronic filings that have been submitted to File & Serve through your user name or by any member of your firm.

After a transaction is completed, you can access a PDF version of all of your filings through the system for up to 180 days. This PDF version is read-only; it can no longer be modified.

## Are hyperlinks permissible in PDF documents?

Internal links, which point to other places within the same document, are permissible and are accepted by File & Serve. However, external links, which point to other documents, websites, or other legal sources, can be risky and must be avoided in documents submitted to the court. Use of external links can result in format errors that may prevent your document from being accepted by File & Serve.



## Fees

### Is there a fee to use File & Serve?

No, there are no fees for using File & Serve. The only fees that users will encounter are statutory filing fees.


### When are the fees assessed if I am filing multiple documents in a case?

Statutory filing fees are assessed against the document contained in the envelope that is subject to the fee, such as the complaint or petition.

### Is it necessary to have a firm credit card?

A credit card is required to pay for statutory filing fees. If you are exempt from paying these fees you can set up a waiver account, but some type of payment account is required in order to use File & Serve.

### Will there be a receipt for the fees paid?

Yes, the **Envelope Details** screen can be printed for use as a receipt. For the old site, select the **Filings** tab, click the  icon to view the filing details. For the H5 site, select **Envelope Details** in the **Actions** dropdown under **Accepted** filings. The **Envelope Detail** screen includes several lines devoted to communication from the bank, including a total amount and the status of the financial transaction.

### What information is on a file date-stamped confirmation receipt?

The File & Serve system confirmation receipt issued by the system contains the following information:

- Case name and number
- Date and time of filing
- Name of the person or entity filing the document
- Fees and payments
- Document title
- Document code
- Date and time of acceptance

## E-serving

### What is e-service?

E-service is a feature provided by File & Serve where documents are electronically served to other parties in a case. Using this option, you can track when each party who you electronically served received and opened the filing. Please review UTCR 21.010(6) and (7) and UTCR 21.100, to become familiar with the court rules pertaining to electronic service using File & Serve.

### Does opposing counsel have to consent to be e-served?

Yes, opposing counsel must consent to be e-served, please refer to UTCR 21.100(1) regarding consent to electronic service.

## What are Firm Service Contacts?

Firm Service Contacts are a list of the firm's contacts that can be attached to the case and can be e-served.

## What are Case Service Contacts?

There are Case Service Contacts for every case. This list contains all individuals being served on the case. Attorneys must ensure that they are on the Case Service Contact list. Please refer to UTCR 2.010(6) and (7) for definitions of "Service Contacts" and Other Service Contacts", and to UTCR 2.100(2) and (3) regarding entry of contact information and selecting service contacts and other service contacts.

You cannot add yourself to a case Service Contact list if you have never filed into the case.

**Note:** Once of you have e-filed in a case, it is mandatory to enter your contact information in the Case Service Contact list to ensure that you will receive notification of the e-service of any documents by others in the case. See UTCR 21.100(2).

## Can I use e-service without filing a document with the court?

Yes, File & Serve may be used to exchange documents between parties without filing the documents through the courts. Courts do not have access to documents that have only been e-served.

Select the **Service** check box on the **Filings** screen, and ensure the **E-File** check box is not selected.

## How do I serve other individuals with my e-filed documents?

The filers are responsible for accomplishing service of all filings as required by the applicable court rules. For this purpose, filers may use the mail service, serve by hand delivery, use e-mail service as permitted by applicable rules, or use electronic service through the use of File & Serve, as it offers the option of electronic service of each filing to the designated service contact.

## Is there a work-around for navigating away from a page without losing data?

Yes, perform the following steps before leaving your workspace to save your data:

1. Complete entering all of the data on the page you are currently working on.
2. Click the button to continue (or **Save Changes** in the H5 version). This will save your data and take you to the next screen.

## Does File & Serve send a service notification after a filing is submitted?

Yes, File & Serve automatically generates service notifications for filing transactions after the filing is submitted if you have selected this option using the **Manage (E-mail) Notification** tab on the **My Account** screen.

**Note:** Check your spam or junk folder if you have not received a notification from File & Serve.

## When is a service notification sent?

Service notifications are generated after submitting a service-only filing.

For E-File & Serve (EFS) filings, a notification is sent only after the court has accepted the filing.

**Note:** Check your spam or junk folder if you have not received a service notification.



## What should I do if I receive a Service Notification?

When you receive a service notification, do the following:

1. Click the link within the e-mail to access the file.
2. Print a copy of the documents for your files right away, as the link is available for a limited time only.

## What is the Master Service List used for in e-filing?

The Master Service List is a list of all contacts attached to the Case Service list from all firms.

The information in the Master Service List is used to send electronic service. The Master Service List is updated as contacts are attached to the case list.

## Format Errors

This section describes the format errors received when using File & Serve.

### Format Errors Defined

#### I am receiving “Format Errors.” What does this mean?

When a filing is not successfully processed and identified as having a “Format Error,” this indicates that the filing has one or more document files that are not valid for filing document conversion. The underlying cause of the issue is typically either that the document was not successfully uploaded or the document has a characteristic that prevents the standard processing of the file.

As a start, errors of this type will be minimized if they comply with a standard format that includes the following:

- Use 8.5x11-inch paper with portrait orientation.
- Set the DPI resolution lower than 300.
- Do not use unintelligible images (i.e., all-black images).
- Use non-secured document properties (i.e., not password-protected).
- Remove external references in the documents, such as URLs and shortcuts.

### Causes of Typical Format Errors

Format errors are typically caused by the following submissions:

- Corrupt files (i.e., files with 0 bytes of data).
- Secured or password-protected PDFs. This includes electronic certificates that prevent a document from being modified. These are typically used on documents containing electronic signatures.
- File types other than PDF.
- Files with non-standard image compression. Standard is CCIT; this is usually a scanner setting.
- A document that has Optical Character Recognition (OCR) associated with it; usually determined by a larger file size.
- Any file that experienced an upload issue or time out on the file transfer on behalf of the filing party; usually appearing as an incomplete image or file when opened.
- A document scan that is in landscape orientation, noticeably off-center, or of an irregular size.
- Any scan (PDF) that is unreadable or has large black images in the document where pictures may have been.

- A file that contains an invalid table; usually a result of importing or pasting table data into a word processing application.


## Actions to Identify the Format Error Issue

There are several ways to identify format issues within filed documents. This section can help identify documents with formatting issues.

### Checking the Filing Queue

The first action is to determine whether the document uploaded successfully.

To determine this, do the following:

1. Open the document files using the **Filing Queue** link on the left menu.
2. Click the  icon under the **Details** column for your case.
3. Scroll down to the **Documents** section of the **Filing Details** page to locate the document uploaded.
4. Click on the document link under the **File Name** column to open the document.

**Note:** If the file does not open using the original authoring tool, cancel this filing and create a new filing.

Prior to uploading documents for new filings, confirm the document files will open successfully from their original source.

### Corrupt Files

Corrupt files, for example, files with zero (0) bytes of data are one of the many reasons a filing has format errors.

Below are examples of corrupt file errors messages:

- A corrupted PDF document with zero byte file.

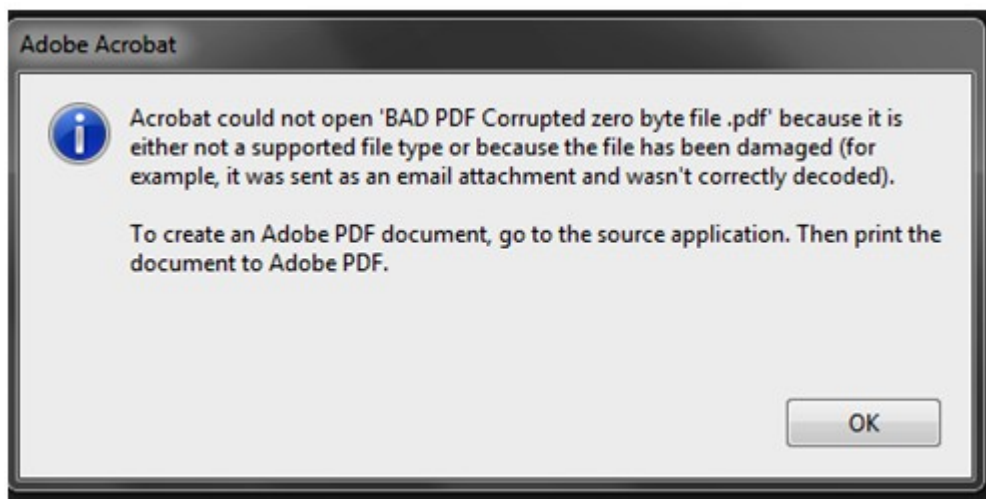


Figure 1.7 – BAD PDF Corrupted File Message

### Document Security

PDF files have security settings that can prevent documents from being e-filed. A file with document security has a padlock icon on the document and/or has “SECURED” shown in the file name.



Figure 1.8 – Document Security Message

The document security can include a number of different options, any of which will prevent the document file from being processed. To ensure successful document processing, recreate the PDF with no security options.

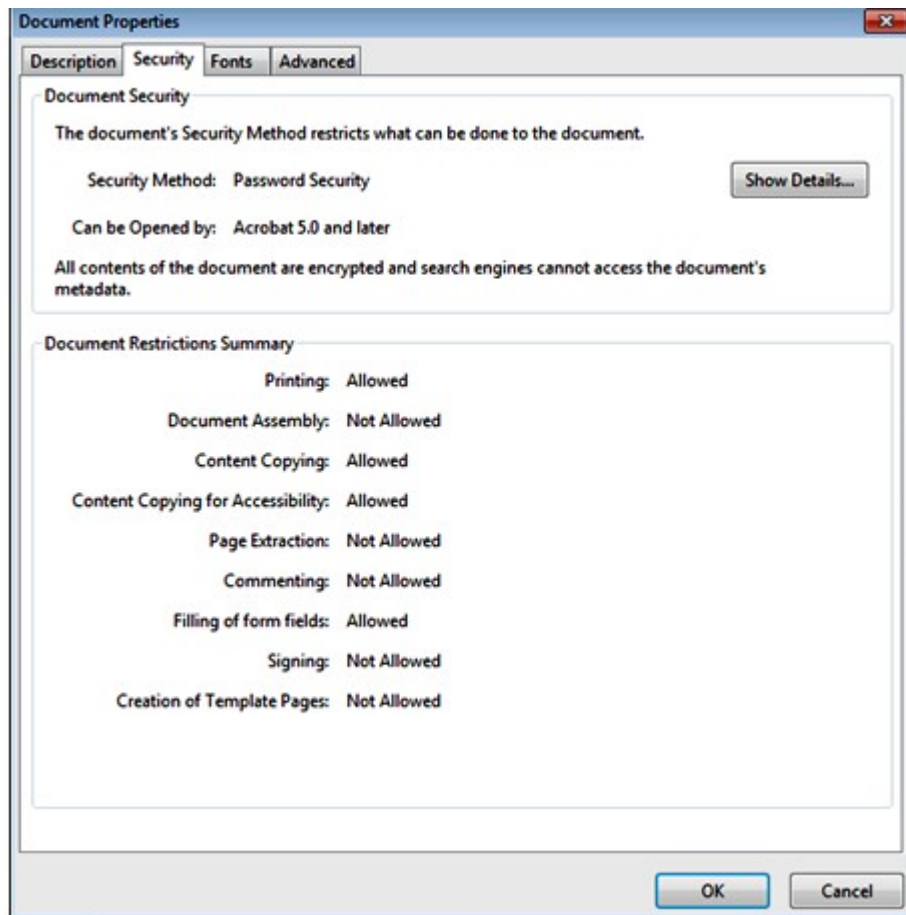


Figure 1.9 – Document Properties Security Tab

## Unsupported Fonts

Font resources are included in newly created documents. This is a standard with PDF/A files. Document generating tools use non-supported fonts when creating documents, which results in the inability to convert the document into the standard e-filing format.

There are multiple ways to examine the fonts embedded in the file. PDF viewers can show the fonts, or the file editors can allow you view the fonts used.

The JBig font is not a supported font.

The following is an example of a PDF viewer identifying the fonts used by a PDF file.

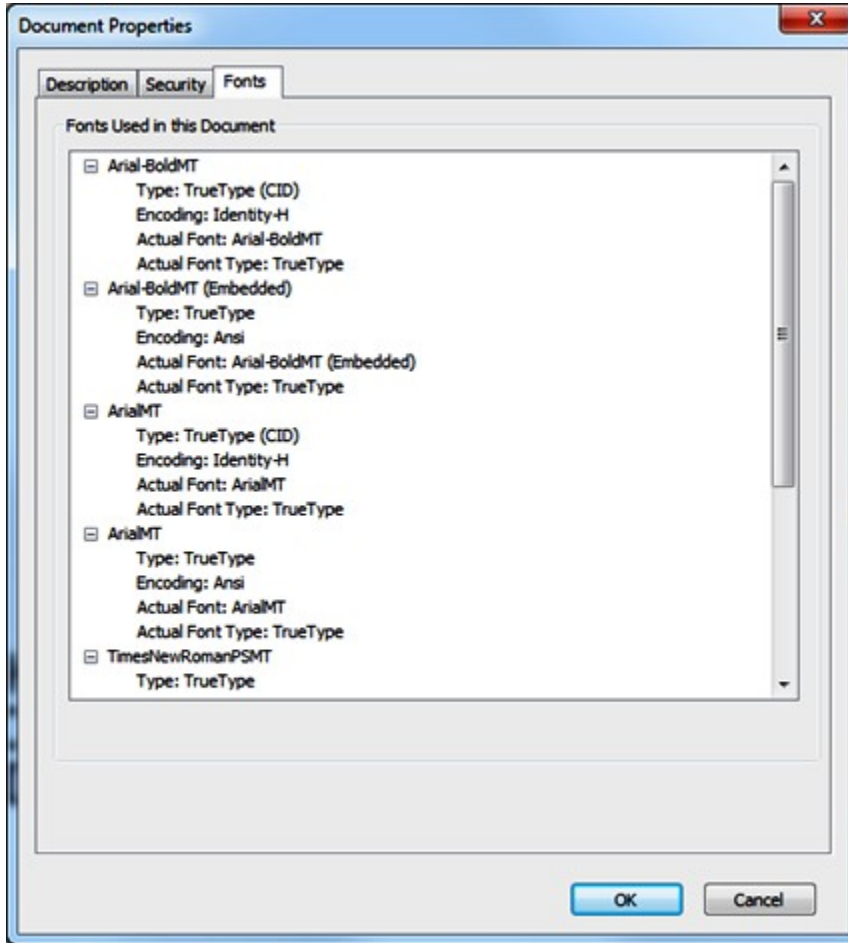


Figure 1.10 – Document Properties Fonts Tab

## Technical Support

For assistance, contact Tyler Technologies through the following resources.

Resource	Contact Information
Odyssey File & Serve Support Hours	7 a.m. to 9 p.m. (CT), Monday through Friday
Odyssey File & Serve Support Chat	Assistance is also available online through <a href="#">Support Chat</a> .
Odyssey File & Serve Email	<a href="mailto:efiling.support@tylertech.com">efiling.support@tylertech.com</a>
Odyssey File & Serve Telephone	800.297.5377
Go To Assist (Support)	Support may ask to assist you by sharing your screen using <a href="#">GoToAssist</a> .