



Odyssey File & Serve™ HTML5

Individual Filer User Guide – Release 3.12

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CHAPTER 1 SYSTEM OVERVIEW

TOPICS COVERED IN THIS CHAPTER

- ◆ RELEASE 3.12 NEW FEATURES
- ◆ BEFORE YOU BEGIN

The 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 customers the opportunity to transition from an inefficient, paper-based process to a streamlined, technology-based electronic filing (e-filing) system.

RELEASE 3.12 NEW FEATURES

This section lists the new features for Release 3.12.

Note: Features vary based on your system configuration.

Public Service Contacts

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

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.

In addition, you can add service contacts from a public list to a case that you are starting or filing into.

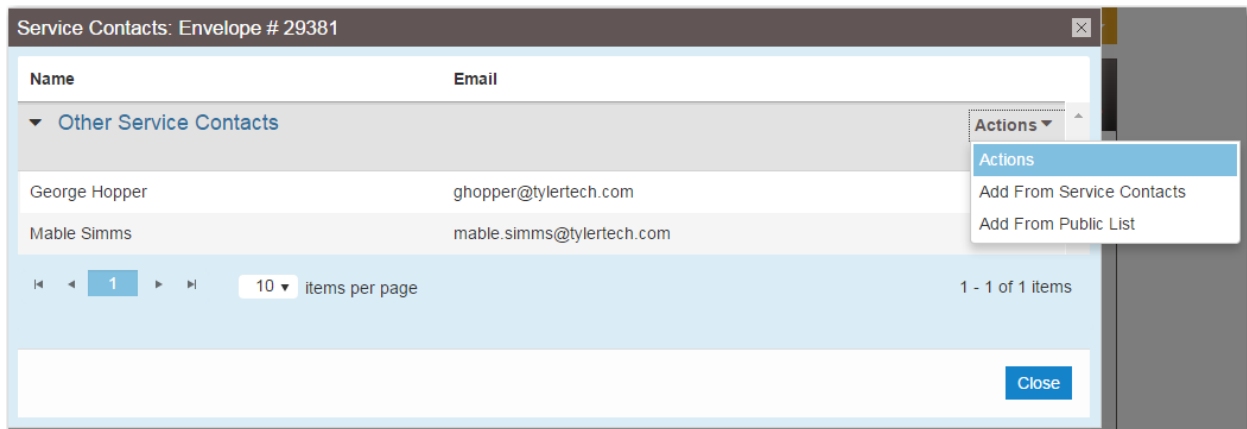
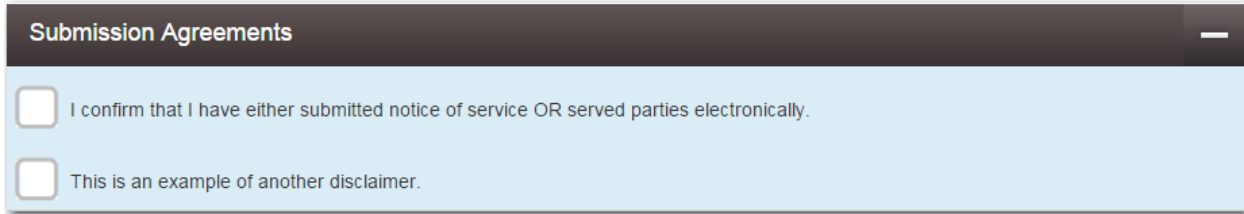


Figure 1.1 – Service Contacts: Envelope # 29381 Page

Submission Agreements

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

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 where you must select a check box before continuing with your filing.



Submission Agreements

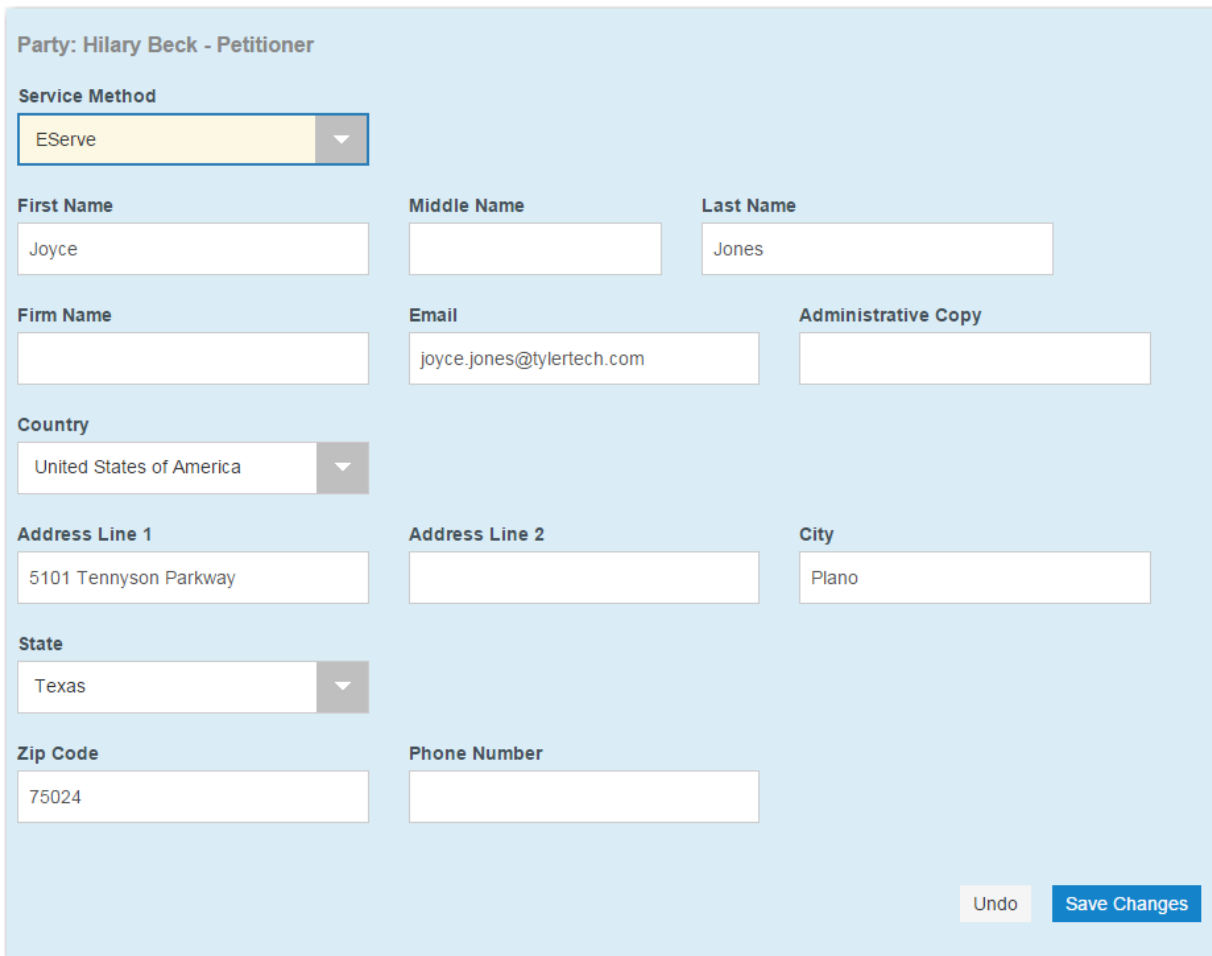
I confirm that I have either submitted notice of service OR served parties electronically.

This is an example of another disclaimer.

Figure 1.2 – Submission Agreements Dialog Box

Modify Service Method Field for Service Contacts

Filers can now modify the **Service Method** field of a service contact even if the service contact is owned by a different firm. This prevents filers from having to create a duplicate service contact.



Party: Hilary Beck - Petitioner

Service Method

EServe

First Name: Joyce

Middle Name:

Last Name: Jones

Firm Name:

Email: joyce.jones@tylertech.com

Administrative Copy:

Country: United States of America

Address Line 1: 5101 Tennyson Parkway

Address Line 2:

City: Plano

State: Texas

Zip Code: 75024

Phone Number:

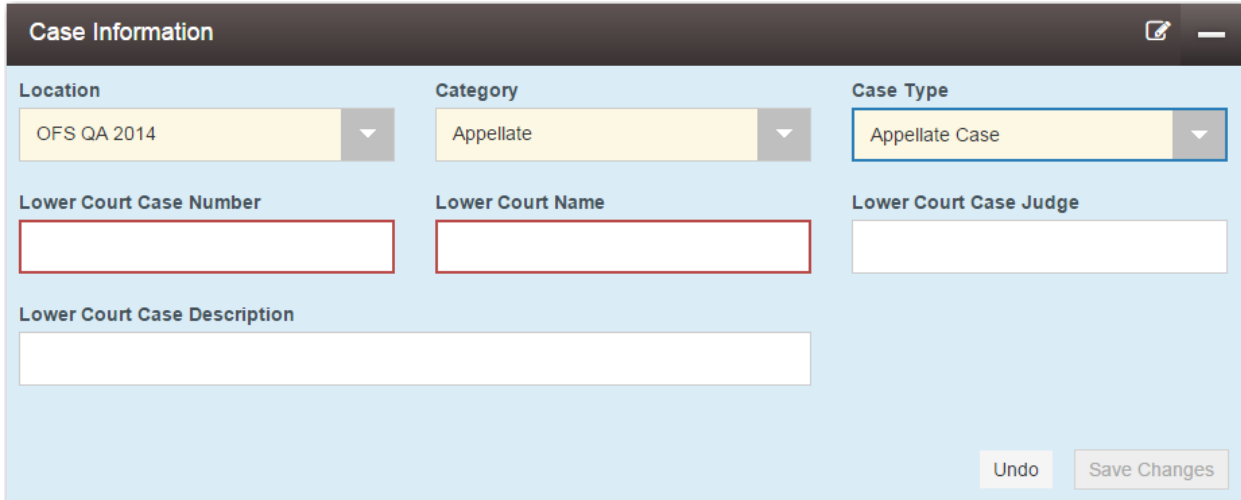
Undo Save Changes

Figure 1.3 – Service Method Field in Service Contacts Section

Appellate Feature in Category Field

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

A new selection, **Appellate**, is available in Release 3.12 in the case **Category** field. When you select **Appellate**, four new fields are displayed. The **Lower Case Number** and **Lower Court Name** fields are required. The **Lower Court Case Judge** and **Lower Court Case Description** fields are optional.



The screenshot shows a 'Case Information' form with the following fields and values:

Location	Category	Case Type
OFS QA 2014	Appellate	Appellate Case

Below these are three empty text input fields:

- Lower Court Case Number
- Lower Court Name
- Lower Court Case Judge

At the bottom left is a larger empty text area for 'Lower Court Case Description'. At the bottom right are 'Undo' and 'Save Changes' buttons.

Figure 1.4 – Appellate Selections in the Case Information Section

Improved Support for Loading Cases with Large Numbers of Parties

The system now provides better support for filing into cases with large numbers of parties. When more than 100 parties are on a case, only the first party of each required type is displayed, along with a message that additional parties could not be displayed due to system constraints.

Case # CC-15-230

Case Information

Location OFS QA 2013 - Court at Law 2	Category Civil	Case Type Appeal
Lower Court/Agency #	Case # CC-15-230	
Date Filed 5/19/2015	Firm Name Individual	Filed By Individual Filer

Party Information

1612 additional parties excluded due to system constraints.

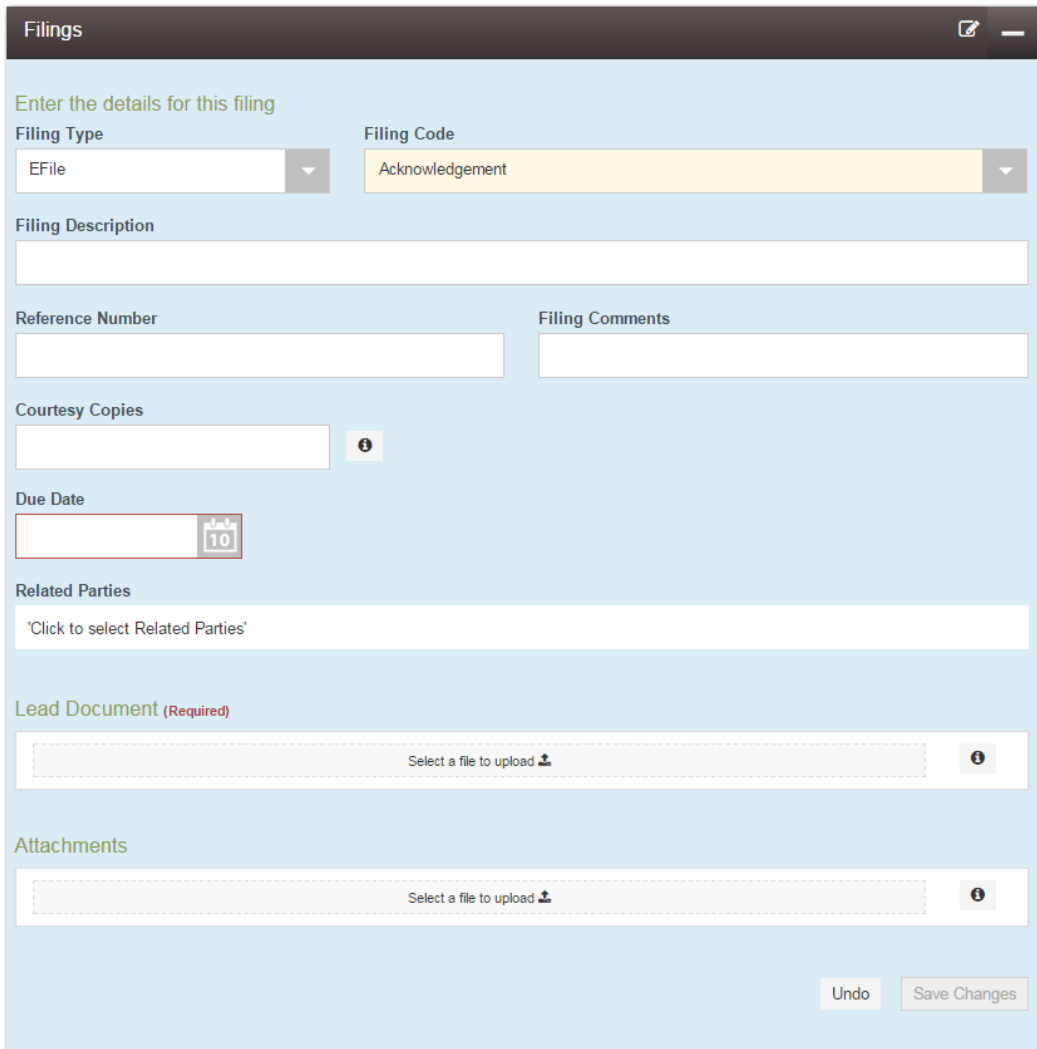
Party Type	Party Name	Attorney
Defendant	Jane Defendant	
Plaintiff	John Plaintiff	

Figure 1.5 – Case Information and Party Information Sections on Case # CC-15-230 Page

Support for Due Date Field at Filing Code Level

The system now has the ability to collect and transmit the due date of an event by filing code and node.

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



The screenshot shows a web-based form titled "Filings". At the top, it says "Enter the details for this filing". The form is organized into several sections:

- Filing Type:** A dropdown menu with "EFile" selected.
- Filing Code:** A dropdown menu with "Acknowledgement" selected.
- Filing Description:** A large text input field.
- Reference Number:** A text input field.
- Filing Comments:** A text input field.
- Courtesy Copies:** A text input field with an information icon.
- Due Date:** A date picker field with a calendar icon and the number "10" visible.
- Related Parties:** A button labeled "'Click to select Related Parties'".
- Lead Document (Required):** A file upload field with the text "Select a file to upload" and an information icon.
- Attachments:** A file upload field with the text "Select a file to upload" and an information icon.

At the bottom right of the form, there are two buttons: "Undo" and "Save Changes".

Figure 1.6 – Filings Section with Due Date Field

New Filing Status of “Returned”

Filings that are returned using the Send To Filer review action now show a new status of “Returned” instead of “Submitted” on the *Filing History* page.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Ref Number	
▼	Case # CC-15-1132				Actions ▼
Envelope # 67243 filed Wednesday, September 16, 2015 at 1:02 PM CDT by Firm Filer on behalf of Lionel Hutz					
Returned	Acknowledgement	EFileAndServe			Actions ▼

Figure 1.7 – Example of a Filing with the Filing Status of “Returned” on the Filing History Page

New Search Icon on the Filing History Page

The search icon on the *Filing History* page has been changed to a magnifying glass.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Ref Number	
▶	Case # CC-15-1597				Actions ▼
Draft # 42591 started Monday, October 05, 2015 at 4:45 PM CDT by Individual Filer					
▼	Case # CC-15-1681				Actions ▼
Draft # 37044 started Thursday, September 03, 2015 at 1:13 PM CDT by Individual Filer					
▼	Envelope # 27765				Actions ▼
Envelope # 27765 filed Monday, July 27, 2015 at 11:22 AM CDT by Individual Filer					
Submitted	Agreement	EFile			Actions ▼
▼	Envelope # 27763				Actions ▼
Envelope # 27763 filed Monday, July 27, 2015 at 11:16 AM CDT by Individual Filer					
Submitted	Assignment	EFile			Actions ▼
▼	Case # CC-15-1597				Actions ▼
Draft # 39 started Wednesday, April 29, 2015 at 11:12 AM CDT by Individual Filer					
Draft	Additional Conditions Of Pr...	EFileAndServe	Filing Code	CC-15-1597	Actions ▼
▼	Envelope # 38				Actions ▼
Envelope # 38 filed Monday, July 27, 2015 at 11:03 AM CDT by Individual Filer					
◀ ◁ 1 ▷ ▶ 20 items per page					1 - 7 of 7 items ↻
Back					

Figure 1.8 – New Magnifying Glass Icon on the Filing History Page

Hide Labels for Blank Fields in the Filings Section

The system has been updated so that when users are viewing the filing details of an envelope, the system no longer shows labels for fields that have no values.

For example, the **Firm Name** field is displayed only for users who belong to a firm. The **Lower Court/ Agency #** field is not displayed if no lower court has been assigned to the case. The **Filing Attorney** field is

not displayed if the filer is an individual filer. And the **Filer Type** field is not displayed if no Filer Type value exists for the filing.

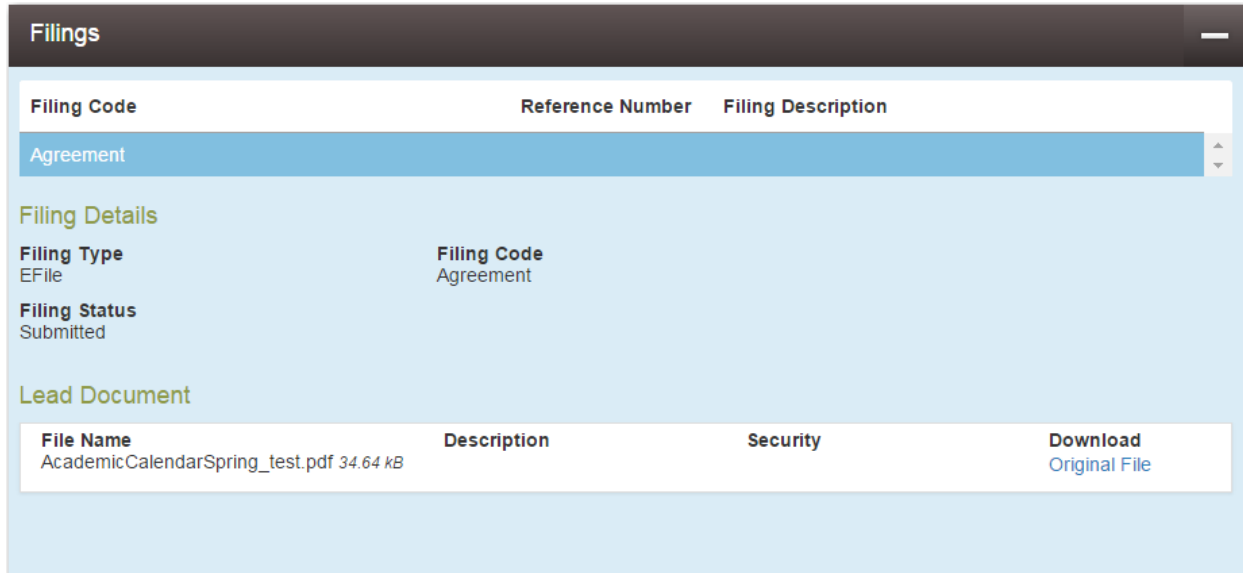


Figure 1.9 – Filings Section – Only Fields with Values Shown

Independent filers do not have an attorney, so the **Filing Attorney** field is not displayed in the **Fees** section.



Figure 1.10 – Fees Section for Independent Filer – Only Fields with Values Shown

Addition of Search and Paging Capability to the Service Contacts Page

The system has been updated to display the service contacts on multiple pages and to allow for searching among the contacts. These improvements provide a more efficient way to handle a large number of 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.

Robert Doe	robert.doe@abc.com	Actions ▾
William Doe	william.doe@tylertech.com	Actions ▾
Polly Doe	polly.doe@abc.com	Actions ▾

12 total items

|« « 1 2 » »| Items per page: 10 ▾

Figure 1.11 – 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 *Service Contacts* search page.

Service Contacts		
<input type="text" value="Robert"/>		<input type="button" value="Add Service Contact"/>
Name	Email	
Robert Doe	robert.doe@abc.com	Actions ▾

Items per page: 10 ▾

1 total items

Figure 1.12 – Service Contacts Search Page

View Attached Case List of Service Contacts

You can now use the Service Contacts list to view the list of cases attached to a service contact.

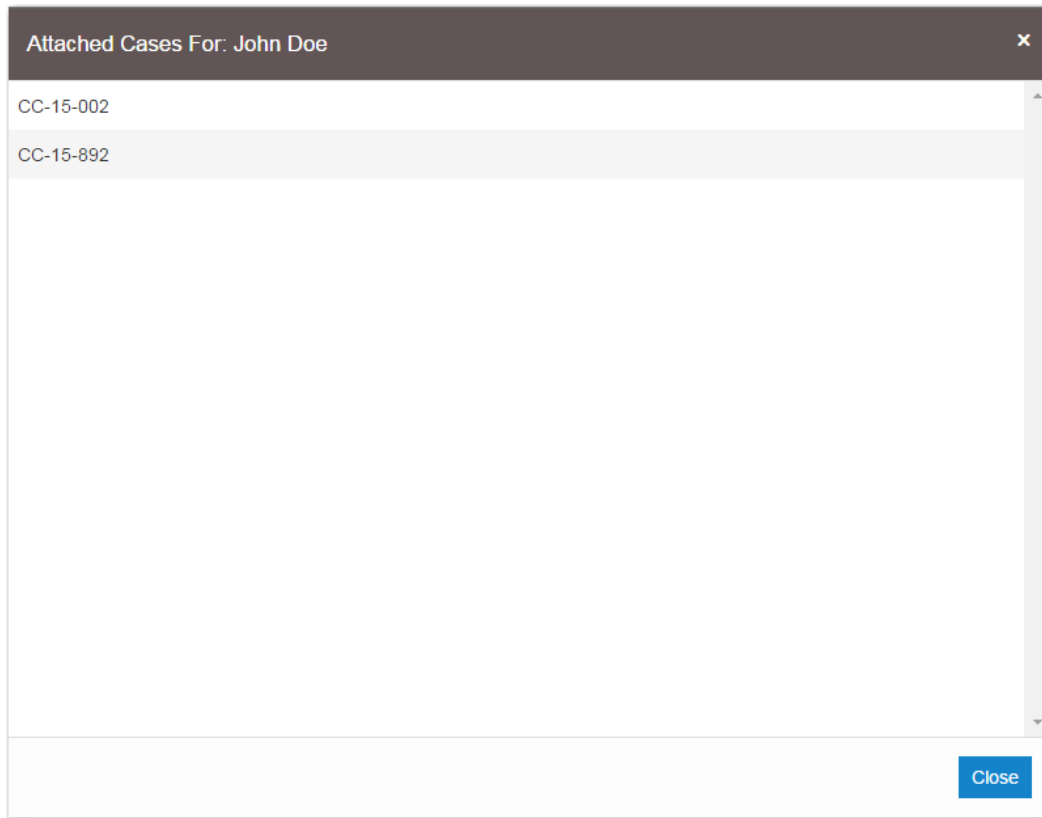


Figure 1.13 – Attached Cases For: John Doe Page

Default Filing Type for Existing Case Filings

The system has been updated to allow for a default filing type to 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.

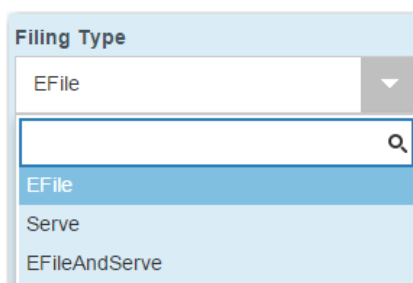


Figure 1.14 – Filing Type Field

Party Information Section Expanded for Existing Case Filings

The system has been updated so that the **Party Information** section is no longer collapsed by default. When filing into an existing case, filers are now able to immediately view the parties associated with the case.

Case # CC-15-520

Case Information +

Party Information -

Party Type	Party Name	Attorney
Defendant	Patty Plaintiff	
Plaintiff	Danny Defendant	

+ Add Another Party

Figure 1.15 – Party Information Section Expanded for Existing Cases

Improved Visibility of Templates Favorite Icon

The system now displays a more visible Favorite icon when a template is being edited.

Templates

Search + New Template

Favorite	Name	Type	Actions
★	District Court	Existing Case	Actions ▾
★	Family Court	Existing Case	Actions ▾

Figure 1.16 – Templates Page with Favorite Icons Displayed

Expand All Sections When Filing Details Are Viewed

The system has been updated so that all sections are expanded when filers view the filing details of an envelope.

Envelope # 38

Envelope Information

Envelope Id 38	Submitted Date 7/27/2015 11:03 AM CDT	Submitted User Name Indie.filer@jyletech.com
-------------------	--	---

Case Information

Location OFS GA 2014 VC - Court at Law 2	Category Civil	Case Type Damages
Firm Name Individual	Filed By Individual Filer	

Party Information

Party Type	Party Name	Attorney
Defendant	Johnson Floors	
Plaintiff	Nicolas Johnson	

Filings

Filing Code	Reference Number	Filing Description
Assignment		

Filing Details

Filing Type EFile	Filing Code Assignment
Filing Status Submitted	

Lead Document

File Name	Description	Security	Download
AcademicCalendar/Spring_test.pdf 34.04 KB			Original File

Service Contacts

Serve	Name	Email
▶	Party: Johnson Floors - Defendant	
▶	Party: Nicolas Johnson - Plaintiff	
▶	Other Service Contacts	

Fees

Assignment		Description	Amount
		Filing Fee	\$0.00
		Filing Total:	\$0.00
		Total Filing Fee	\$0.00
		Envelope Total:	\$0.00

Party Responsible for Fees	Johnson Floors
Payment Account	Waiver
Filer Type	Default

[View Filing History](#)
[View Receipt](#)

Figure 1.17 – Expanded Sections of an Envelope When Filing Details Are Viewed

BEFORE YOU BEGIN

This guide is intended for individual filers (pro se/self-represented litigants).

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

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

SYSTEM REQUIREMENTS

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

- **Browser Requirements** – The system supports Internet Explorer® 10 or 11; Chrome™; Mozilla® Firefox®; or Safari® application program. If your browser does not meet these minimum requirements, please contact your network administrator.
- **Operating Systems** – The system supports Microsoft® Windows®, Linux®, Chrome OS™, Android™, and OS X® operating system software.
 - **Note: iOS is not supported.**
- **Minimum Hardware Requirements** – The system supports the following hardware:
 - Intel® Core™ Duo processors or AMD processor manufactured in 2012 or later
 - 2 GB of RAM
 - 1366 x 768 resolution screen for desktop or 1280 x 720 resolution screen for mobile devices
- **Recommended Hardware Requirements** – Tyler recommends the following hardware:
 - Intel® Core™ i3 or AMD A6 processor with at least 2.0 GHz clock speed
 - 4 GB of RAM
 - 1920 x 1080 resolution for both desktop and mobile devices
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Document Format** – PDF is the only format allowed for attaching documents when using the system.

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 File & Serve system, you can use keyboard shortcuts for assistance. Press SHIFT+? to display the following window.

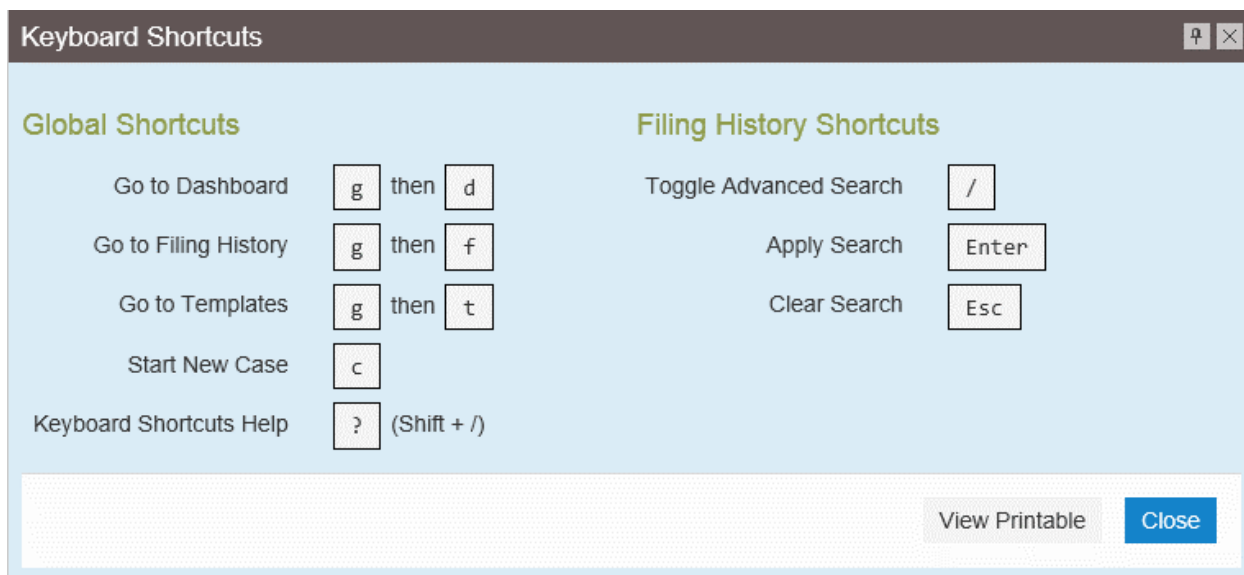


Figure 1.18 – Keyboard Shortcuts Window

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.

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**.

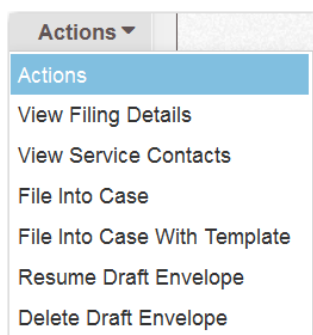


Figure 1.19 – Actions Drop-Down List

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 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

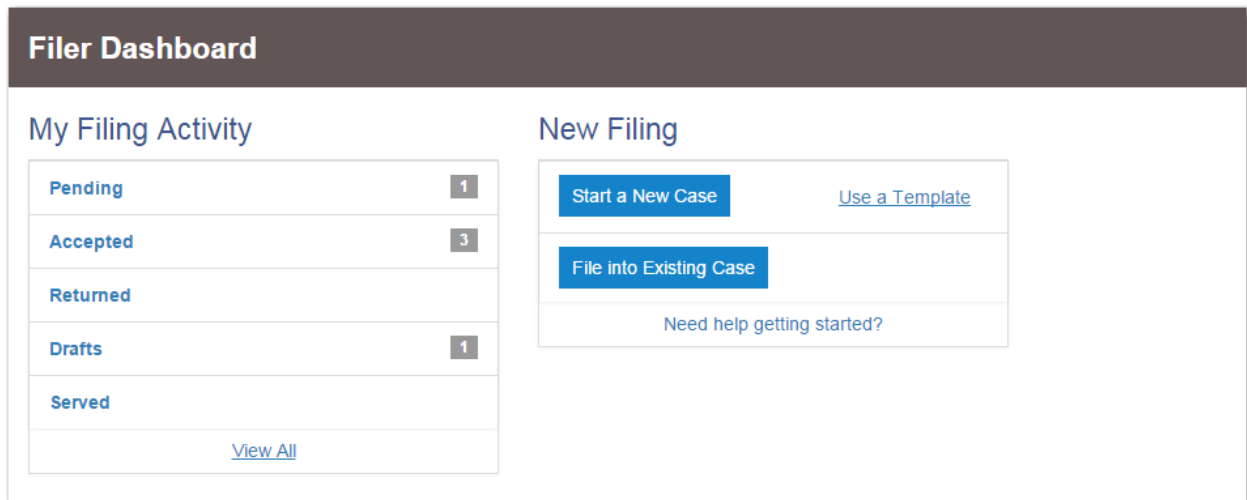


Figure 1.20 – Filer Dashboard Page

- From the **Actions** drop-down list

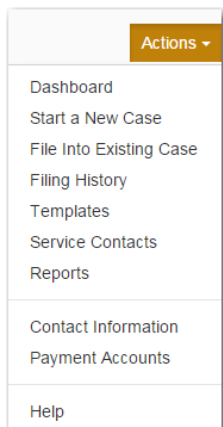


Figure 1.21 – Actions Drop-Down List

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

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.

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.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Ref Number	
▶	Case # CC-15-1597				Actions ▼
	Draft # 42591 started Monday, October 05, 2015 at 4:45 PM CDT by Individual Filer				
▼	Case # CC-15-1681				Actions ▼
	Draft # 37044 started Thursday, September 03, 2015 at 1:13 PM CDT by Individual Filer				
▼	Envelope # 27765				Actions ▼
	Envelope # 27765 filed Monday, July 27, 2015 at 11:22 AM CDT by Individual Filer				
Submitted	Agreement	EFile			Actions ▼
▼	Envelope # 27763				Actions ▼
	Envelope # 27763 filed Monday, July 27, 2015 at 11:16 AM CDT by Individual Filer				
Submitted	Assignment	EFile			Actions ▼
▼	Case # CC-15-1597				Actions ▼
	Draft # 39 started Wednesday, April 29, 2015 at 11:12 AM CDT by Individual Filer				
Draft	Additional Conditions Of Pr...	EFileAndServe	Filing Code	CC-15-1597	Actions ▼
▼	Envelope # 38				Actions ▼
	Envelope # 38 filed Monday, July 27, 2015 at 11:03 AM CDT by Individual Filer				
⏪ ◀ 1 ▶ ⏩ 20 items per page					1 - 7 of 7 items ↻
Back					

Figure 1.22 – Filing History Page

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 initial filings and subsequent filings.



Templates			
<input type="text" value="Search"/>			+ New Template
Favorite	Name	Type	
	District Court Filings	New Case	Actions ▾
	Family Law	Existing Case	Actions ▾

Figure 1.23 – Templates Page

Service Contacts

The *Service Contacts* page provides the ability to create and save your frequently used service contacts.

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 you or your firm performed.

Reports

Financial Reconciliation Report
Useful when reconciling financial transactions against filings submitted during a selectable time frame up to 60 days

- Provides envelope level information specific to fees and their capture date
- Delivered in an Excel spreadsheet to allow for filtering and searching

Filings Report
Useful when looking for detailed information about financial transactions

- Provides filing level details specific to fees tied to each filing in the envelope
- Includes a complete breakdown of the filing fees as well as the date the fees were captured

Figure 1.24 – Reports Page

Contact Information

Select **Contact Information** from the **Actions** drop-down list to change the contact information that you previously entered into the system. Then, click **Save Changes** to save your modifications, or click **Undo** to exit without changing your contact information.

Contact Information

Country
United States of America

Address Line 1
5101 Tennyson

Address Line 2

City Plano **State** Texas

Zip Code 75024 **Phone Number** 2313332

Undo Save Changes

Figure 1.25 – Contact Information Page

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.

Payment Accounts			
+ Add Payment Account			
Payment Account Name	Payment Account Type	Active	Actions
County Account (DISCOVER 9...	Credit Card	Yes	Actions ▾
John's Account	Cash	Yes	Actions ▾
Mary Ann's account (DISCOVE...	Credit Card	Yes	Actions ▾
Mary Ann's Waiver Account	Waiver	Yes	Actions ▾

1 - 4 of 4 items

Figure 1.26 – Payment Accounts Page with Existing Payment Accounts

If you have no existing payment accounts, add an account by selecting **Payment Accounts** from the **Actions** drop-down list. An introductory page is displayed with information about setting up a payment account.

+ Add Payment Account

If you want to add a new payment account, click

Save Changes

to save your payment account information, or click

Undo

Help

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

CHAPTER 2 E-FILING OVERVIEW

TOPICS COVERED IN THIS CHAPTER

◆ FILING QUEUE STATUS

This section describes the e-filing process.

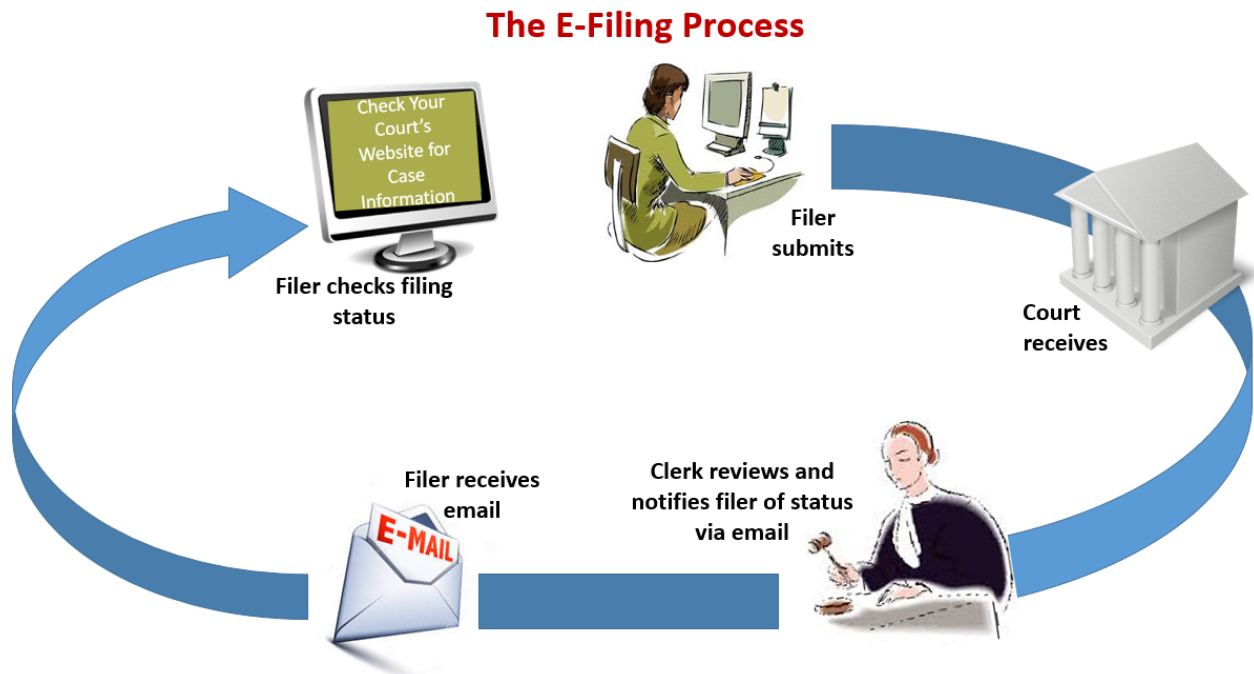


Figure 2.1 – The E-Filing Process

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 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.

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.
Received	EFO, EFS	The reviewer has received the document, but some additional action needs to be taken by the court. Example: In a proposed order, the proposed order is received, and then the document is routed to the judge for review and signing.
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 as additional action must be taken by the filer. 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.

Status	Filing Type	Definition
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 <i>Details</i> page, and the filer is notified of specifics through email.

CHAPTER 3 HOME PAGE

TOPICS COVERED IN THIS CHAPTER

- ◆ REGISTERING AS AN INDIVIDUAL FILER
- ◆ RESETTING YOUR 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.

The screenshot displays the File & Serve Home Page. At the top is a dark header with the text "Court Links and Information". Below this, there is a white box containing instructions: "For instructions on registrations please [click here](#)." This is followed by two sections: "Reno Justice Civil Division – Now live" with the subtext "Reno Justice Civil Division is now accepting civil filings. Please be advised the civil cover sheets are required for filing a new case to the Division." and "Clark County Justice Courts - Now Live" with the subtext "If you were a user of the Wiznet application, you will need to register a new account. You will be unable to sign-in with your wiznet credentials. If you are not an attorney, nor filing on behalf of an attorney or law firm, you will need to register your account as an individual account (see process below)". Below these are three blue links: "Reno Justice Civil Division", "Eighth Judicial District Court", and "Clark County Courts Home Page".

Below the Court Links section are two dark headers: "Actions" and "Self Help". Under "Actions", there are two icons: a blue padlock icon labeled "Sign In" and a green notepad icon labeled "Register". Under "Self Help", there is a section titled "Helpful Links" with three blue links: "Self Help", "Clark and Reno Justice Court Online Training Sessions", and "Clark District Court Online Training Sessions".

Figure 3.1 – File & Serve Home Page

Court Links and Information

The **Court Links and 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 File & Serve system. Type your email address and password to sign in to File & Serve.

The **Register** link takes you to the page where you can register in the system by using your name and contact information. 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 as well as answers to questions regarding e-filing.


REGISTERING AS AN INDIVIDUAL FILER

You can register as an individual filer if you are a single user of the system, which means a user who is not associated with any firm or is not represented by any firm.

Note: Refer to your local court's website before registering as an individual filer, as registration options may vary.

To register as an individual filer, 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, 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 check box for a self-representative account.

Register

User Information » [Firm Information](#) » Terms and Conditions » Complete

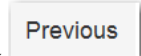
Registration Options


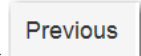
<div style="background-color: #444; color: white; padding: 5px; margin-bottom: 5px;">Register for a Firm Account</div> <p style="font-size: small; margin-top: 5px;">Perfect for:</p> <ul style="list-style-type: none"> - Attorneys - Firms with multiple filers - Solo Attorney Practitioners <div style="text-align: right; margin-top: 10px;"><input type="checkbox"/></div>	<div style="background-color: #444; color: white; padding: 5px; margin-bottom: 5px;">Register for a Self-Representative Account</div> <p style="font-size: small; margin-top: 5px;">Perfect for:</p> <ul style="list-style-type: none"> - Pro Se Filers - Process Servers - Landlords / Tenants <div style="text-align: right; margin-top: 10px;"><input checked="" type="checkbox"/></div>
---	--

Figure 3.2 – Register Page – Self-Representative Account

5. Complete the required fields.

 Next

 Previous

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 opens. Read the usage agreement before proceeding.

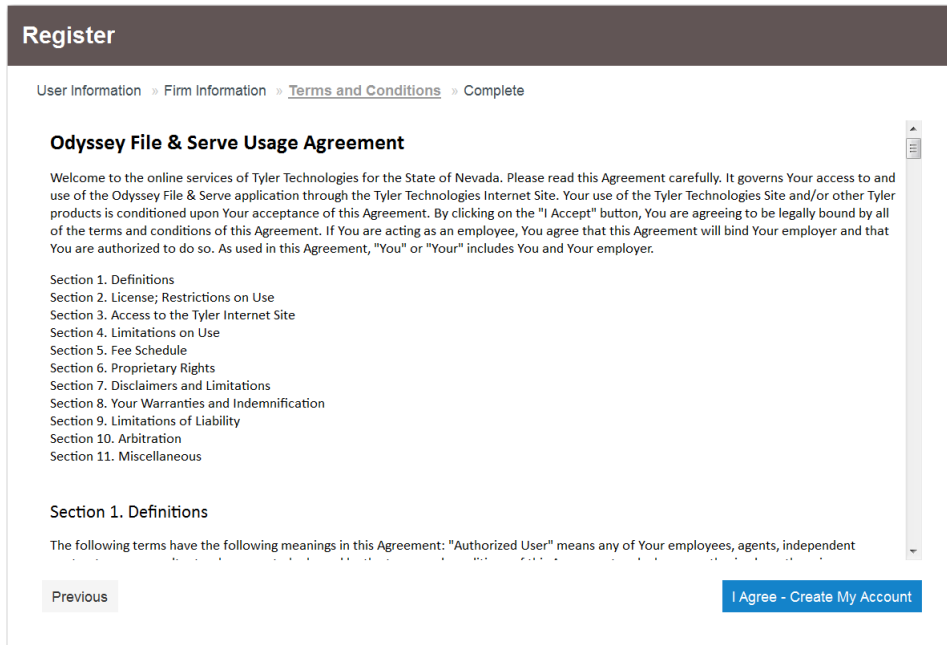


Figure 3.3 – Register Page with Usage Agreement

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.

If you continue with your registration, a confirmation page opens, and a verification email is sent to the email address you provided.

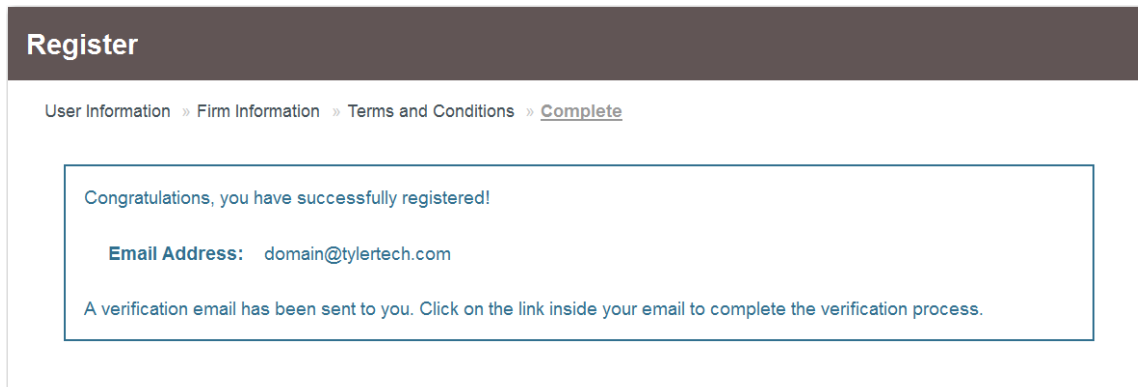


Figure 3.4 – Register Page with Confirmation

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

RESETTING YOUR PASSWORD

If you have forgotten your password, type the email address you used during registration and then click [Forgot Password?](#)

i Note: Your password is case sensitive. Ensure that Caps Lock is not on.

Figure 3.5 – Username / Password Sign In Page

To reset your password, perform the following steps:

1. Click [Forgot Password?](#) on the *Username / Password Sign In* page.

A page opens requesting that you type your email address.

Figure 3.6 – Change Password Page

2. Type the email address that you provided during the registration process in the **Email Address** field.
3. Click [Next](#) to continue.
4. Type your answer in the **Security Answer** field.
5. Click [Reset Password](#).

The system displays this 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.

6. Check your email inbox.
7. Locate the email from File & Serve.
8. Click the link labeled click **here** to reset your password.

You will be prompted to create a new password.

9. Enter a new password in the **New Password** field.
10. Re-enter your new password in the **Repeat New Password** field.
11. Click **Change Password**.

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

CHAPTER 4 SIGN IN AND SIGN OUT

TOPICS COVERED IN THIS CHAPTER

- ◆ SIGNING IN
- ◆ SIGNING OUT

All users are required to sign in to e-file and 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.

Perform the following steps to sign in:

1. Navigate to the home page.



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

A screenshot of a web form titled "Username / Password Sign In". The form has a dark header bar with the title in white. Below the header, there are two input fields: "Email" and "Password". Below the "Password" field is a blue "Sign In" button. Underneath the button is a checkbox labeled "Remember me?". At the bottom of the form is a link that says "Forgot Password?".

Figure 4.1 – Username / Password Sign In Page

Note: After several failed attempts to sign in to the system, your account is locked. You can unlock your account by selecting [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 File & Serve.

Perform the following steps to sign out:

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

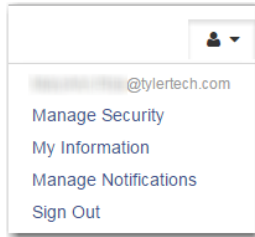


Figure 4.2 – Sign Out Option on the Profile Drop-Down List

The *Sign Out* page is displayed.



Figure 4.3 – Sign Out Page

2. Return to the home page to sign in to the system.

CHAPTER 5 PROFILE PREFERENCES

TOPICS COVERED IN THIS CHAPTER

- ◆ CHANGING THE USER PASSWORD
- ◆ CHANGING THE SECURITY QUESTION
- ◆ UPDATING USER INFORMATION
- ◆ 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.

Perform the following steps to change the user password:

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

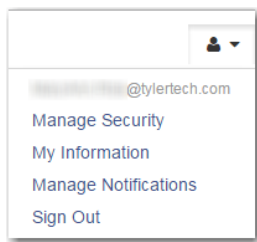


Figure 5.1 – Profile Drop-Down List

The *Manage Security* page opens.



The screenshot shows the 'Manage Security' page with two main sections:

- Change Password:** Contains three input fields: 'Old Password', 'New Password', and 'Re-enter New Password'. Below these fields are two buttons: 'Undo' and 'Save Changes'.
- Change Security Question:** Contains a message box stating 'You must enter your password in order to update your security question and/or answer.' Below this are three input fields: 'Security Question' (with the text 'Name of my heart dog?'), 'Security Answer', and 'Current Password'. Below these fields are two buttons: 'Undo' and 'Save Changes'.

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.

Perform the following steps to change your security question:

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

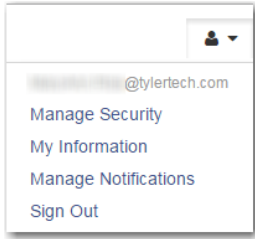




Figure 5.3 – Profile Drop-Down List

The *Manage Security* page opens.

A screenshot of the 'Manage Security' page. The page has a dark header with the title 'Manage Security'. Below the header, there are two main sections. The first section is titled 'Change Password' and contains three text input fields: 'Old Password', 'New Password', and 'Re-enter New Password'. At the bottom right of this section are 'Undo' and 'Save Changes' buttons. The second section is titled 'Change Security Question' and contains a message box that says 'You must enter your password in order to update your security question and/or answer.' Below this message are three text input fields: 'Security Question' (with the placeholder text 'Name of my heart dog?'), 'Security Answer', and 'Current Password'. At the bottom right of this section are 'Undo' and 'Save Changes' buttons.

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.

UPDATING USER INFORMATION

Users can update their personal information.

Perform the following steps to update your personal information:

1. From the profile drop-down list, select **My Information**.

The *My Information* page opens.

My Information

My User Information

Note: If you are updating your email address/user name you will be asked to sign back in.

First Name
Individual

Middle

Last Name
Filer

Email Address
indie.filer@tylertech.com

Undo Save Changes

Figure 5.5 – My Information Page

2. Update any information as needed. Click

Save Changes

to save your changes, or click

Undo

to

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 opens.

Manage Notifications

Email Notifications

Select the email notifications that you wish to receive.

Filing Accepted	Filing Rejected	Filing Submitted
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Service Undeliverable	Filing Submission Failed	Filing Received
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 5.6 – 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 Received**.

3. Click to save your notification selection, or click to exit without changing your notification information.

CHAPTER 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.

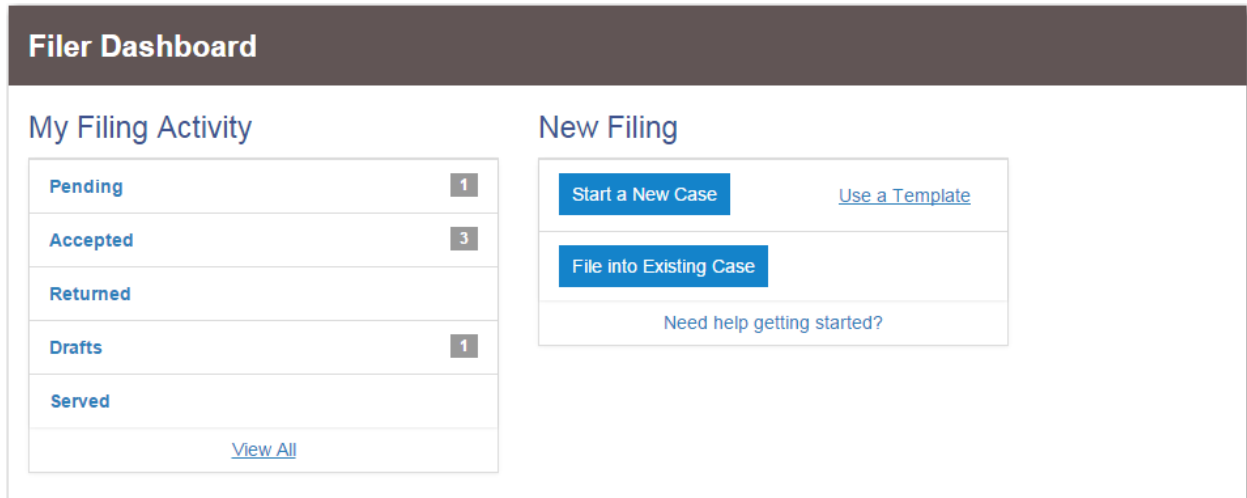


Figure 6.1 – Filer Dashboard Page

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.
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.

CHAPTER 7 PAYMENT ACCOUNTS

TOPICS COVERED IN THIS CHAPTER

- ◆ ENTERING PAYMENT ACCOUNT DETAILS
- ◆ UNAVAILABLE PAYMENT ACCOUNTS
- ◆ DRAW DOWN ACCOUNT USER INTERFACE

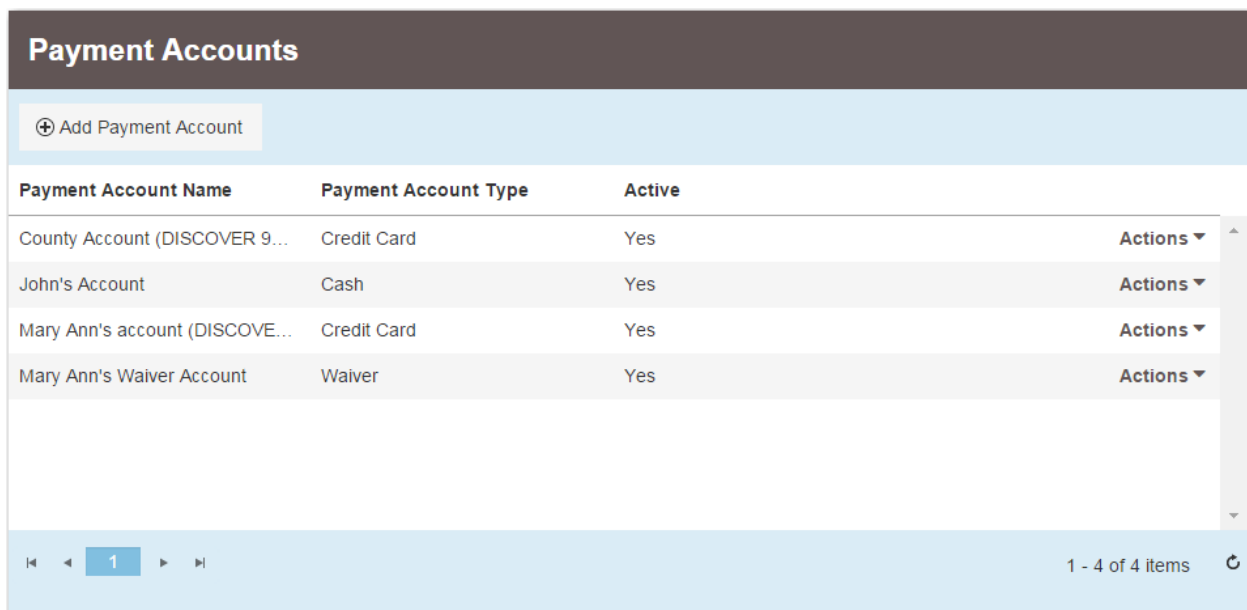
ENTERING PAYMENT ACCOUNT DETAILS

You must set up a payment account before you can submit a filing to the court.

To set up a payment account, perform the following steps:

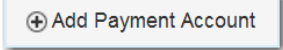
1. From the **Actions** drop-down list, select **Payment Accounts**.

The *Payment Accounts* page opens.



Payment Account Name	Payment Account Type	Active	Actions
County Account (DISCOVER 9...	Credit Card	Yes	Actions ▾
John's Account	Cash	Yes	Actions ▾
Mary Ann's account (DISCOVE...	Credit Card	Yes	Actions ▾
Mary Ann's Waiver Account	Waiver	Yes	Actions ▾

Figure 7.1 – Payment Accounts Page

2. Click .
3. Type a name for the payment account in the **Payment Account Name** field.
4. Select a payment account from the drop-down list in the **Payment Account Type** field.
5. Complete the required fields, which differ depending on the type of account you selected.

If you select **Credit Card**, **Draw Down**, or **eCheck**, you will be prompted for additional information.

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

If you select **Waiver**, no additional information is required.

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

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 in the **Payment Account** field. The link contains the following phrase: *Why don't I see all of my accounts?*

Fees

▼ Acknowledgment

Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	
Total Filing Fee \$0.00	
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total: \$2.00	

Party Responsible for Fees

Click to select Party Responsible for Fees ▼

Payment Account

Click to select Payment Account ▼

[Why don't I see all of my accounts?](#)

Filer Type

Click to select Filer Type ▼

Undo Save Changes

Figure 7.2 – Error Message in the Payment Account Field

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

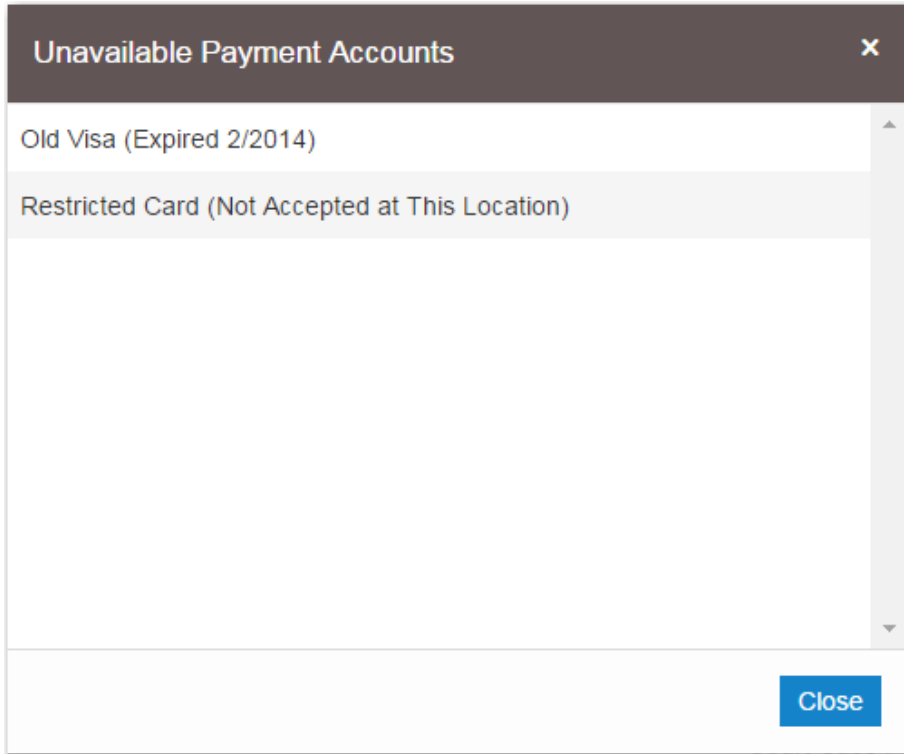


Figure 7.3 – Unavailable Payment Accounts Window

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

DRAW DOWN ACCOUNT USER INTERFACE

The locations of existing draw down accounts can be edited.

i 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.

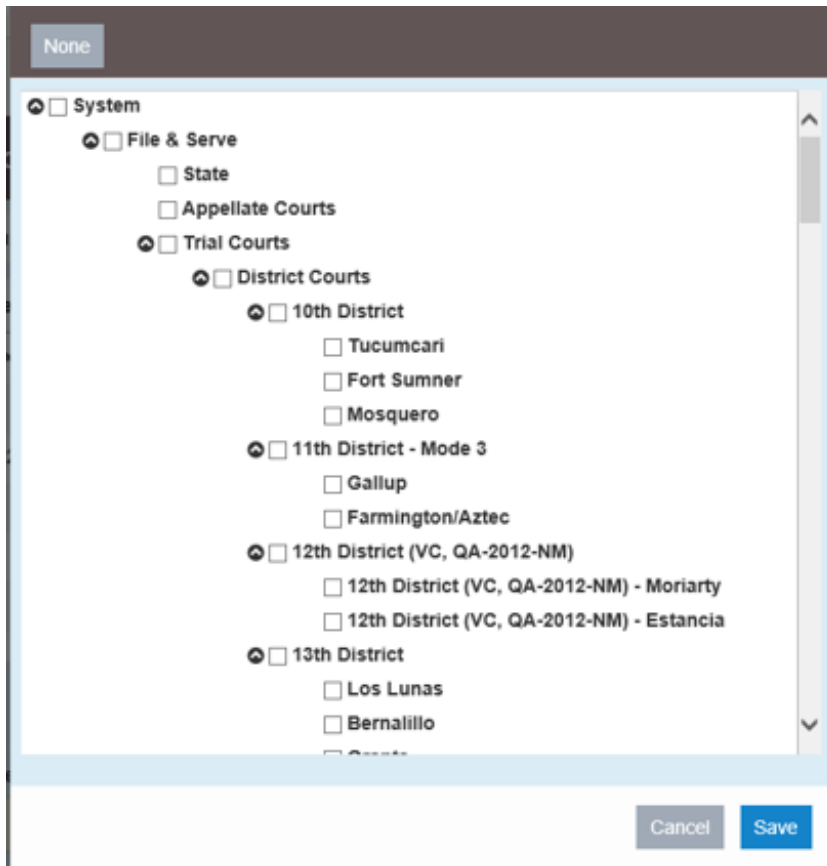


Figure 7.4 – Draw Down Account with Parent-Child Relationship of Courts

CHAPTER 8 TEMPLATES

TOPICS COVERED IN THIS CHAPTER

- ◆ CREATING A TEMPLATE
- ◆ EDITING A TEMPLATE
- ◆ USING A NEW CASE TEMPLATE
- ◆ USING AN EXISTING CASE TEMPLATE
- ◆ VIEWING TEMPLATE DETAILS
- ◆ DELETING A TEMPLATE

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, select **Templates**.

The *Templates* page opens.

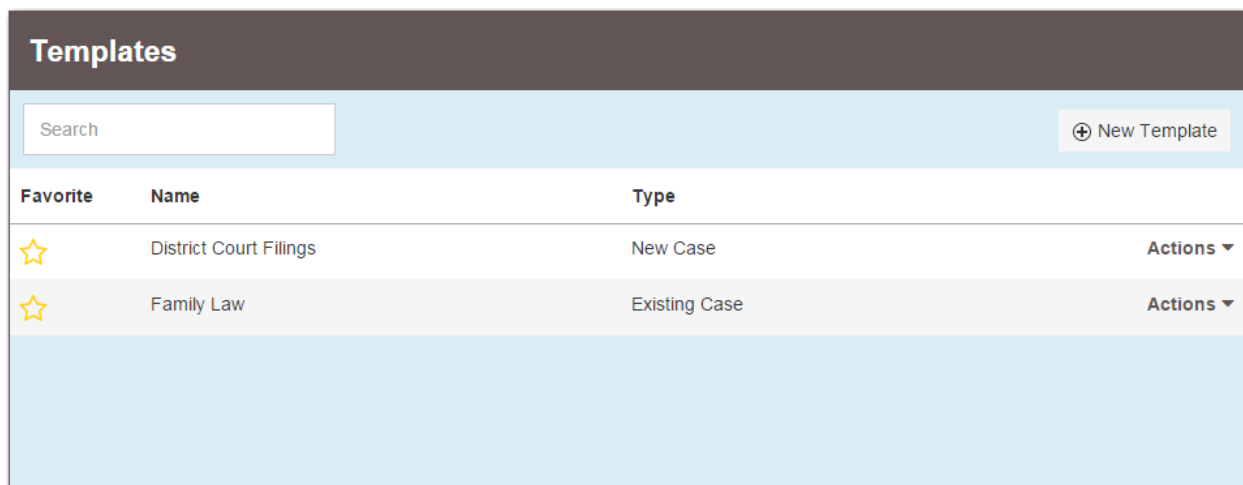
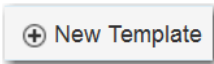


Figure 8.1 – Templates Page

2. Click  .

The *New Template* page opens.

Figure 8.2 – New Template Page

3. Type a name for the template in the **Template Name** field. Indicate if this is a new case template or an existing case template by selecting either the **New Case** or **Existing Case** check box.

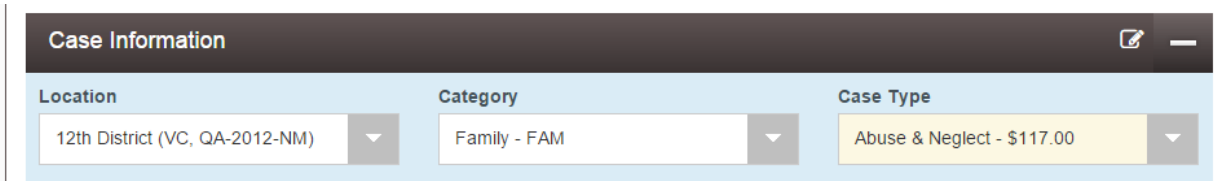
Note: The field name is shown with a red outline around it, indicating that it is a required field.

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 the location from the drop-down list in the **Location** field.
 - b. Select the category from the drop-down list in the **Category** field.
 - c. Select the case type from the drop-down list in the **Case Type** field.

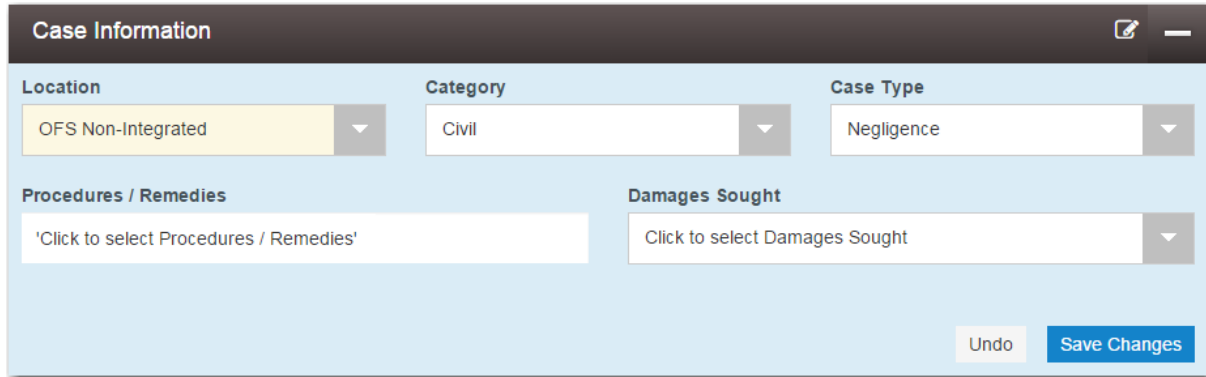
Note: The fee associated with the case type is displayed.



The screenshot shows a 'Case Information' form with three dropdown menus. The 'Location' dropdown is set to '12th District (VC, QA-2012-NM)'. The 'Category' dropdown is set to 'Family - FAM'. The 'Case Type' dropdown is set to 'Abuse & Neglect - \$117.00'. The form has a dark header bar with a pencil icon and a minus sign.

Figure 8.3 – Case Type Field with Fees Displayed

Note: The options for the category and case type are determined by the location that you select.



The screenshot shows a 'Case Information' form with five fields. The 'Location' dropdown is set to 'OFS Non-Integrated'. The 'Category' dropdown is set to 'Civil'. The 'Case Type' dropdown is set to 'Negligence'. Below these are two more dropdowns: 'Procedures / Remedies' with the text 'Click to select Procedures / Remedies' and 'Damages Sought' with the text 'Click to select Damages Sought'. At the bottom right are 'Undo' and 'Save Changes' buttons.

Figure 8.4 – Case Information Section

Note: If you select Civil in the Category field, you must also complete the Procedures / Remedies and Damages Sought fields.

The screenshot shows a 'Case Information' form with the following fields:

- Location:** OFS Non-Integrated
- Category:** Civil
- Case Type:** Negligence
- Procedures / Remedies:** A drop-down menu is open, showing options: Appeal, Class Action, and Garnishment.
- Damages Sought:** A field with the text 'Click to select Damages Sought' and a downward arrow.

 At the bottom right, there are two buttons: 'Undo' and 'Save Changes'.


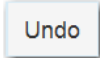
Figure 8.5 – Procedures / Remedies Drop-Down List

The screenshot shows the same 'Case Information' form, but with the 'Damages Sought' drop-down menu open. The menu options are:

- Click to select Damages Sought
- Under \$1000
- Between \$1000 and \$5000
- Over \$5000

 The 'Procedures / Remedies' field now contains the text 'Click to select Procedures / Remedies'. The 'Party Information' section is visible at the bottom of the form.

Figure 8.6 – Damages Sought Drop-Down List

6. Click  to save your changes, or click  to cancel the action.
7. Complete the fields in the **Party Information** section, including the petitioner and respondent.

Party Information

Party Type	Party Name	Attorney
Plaintiff		Required Party
Defendant		Required Party

[+ Add Another Party](#)

Enter details for this Party

I am this party

Party Type
Plaintiff

Party is a Business/Agency

Attorney
Click to select Attorney

First Name

Middle Name

Last Name

Suffix

Country
United States of America

Address Line 1

Address Line 2

City

State
Click to select State

Zip Code

Phone Number

Filer ID

[Undo](#) [Save Changes](#)

Figure 8.7 – Party Information Section

8. Complete the information in the **Filings** section.

The screenshot shows a web form titled "Filings" with a dark header bar. Below the header, the form is divided into several sections:

- Enter the details for this filing**: This section contains two dropdown menus. The "Filing Type" dropdown is set to "EFile", and the "Filing Code" dropdown is set to "Acknowledgement".
- Filing Description**: A single-line text input field.
- Reference Number** and **Filing Comments**: Two side-by-side text input fields.
- Courtesy Copies**: A text input field with an information icon to its right.
- Due Date**: A date picker field showing the date 10/10.
- Related Parties**: A button labeled "'Click to select Related Parties'".
- Lead Document (Required)**: A file upload field with the text "Select a file to upload" and an information icon.
- Attachments**: Another file upload field with the text "Select a file to upload" and an information icon.

At the bottom right of the form, there are two buttons: "Undo" and "Save Changes".

Figure 8.8 – Filings Section

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

The screenshot shows a web form titled "Filings" with a header bar containing a pencil icon and a minus sign. Below the header, the text "Enter the details for this filing" is displayed. The form contains several fields: "Filing Type" (a dropdown menu with "EFile" selected), "Filing Code" (a dropdown menu with "Click to select Filing Code" selected and a search icon), "Filing Description" (a text input field), "Reference Number" (a text input field), and "Courtesy Copies" (a text input field). The "Filing Code" dropdown list is open, showing a search bar and a list of options: "Click to select Filing Code", "A Non-Docketed Event", "Abstract Of Judgment - \$50.00", "Acknowledgement", "Acknowledgment Of Paternity - \$100.00", and "Acquittal".

Figure 8.9 – Filing Code Field with Drop-Down List Displayed

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

The screenshot shows the same "Filings" form as in Figure 8.9. The "Filing Code" dropdown menu is now closed, and the selected option "Abstract Of Judgment - \$50.00" is displayed in the field. The other fields remain the same as in the previous screenshot.

Figure 8.10 – Filing Code Field with Fee Displayed

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

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

- e. Type any relevant comments in the **Filing Comments** 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. 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.

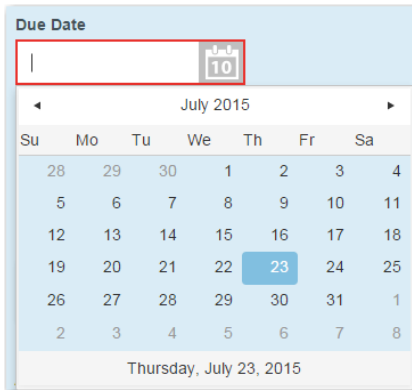


Figure 8.11 – Due Date Calendar

- h. If you want to associate the parties with the template, click the **Related Parties** field to select the parties from the drop-down list that is displayed.

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

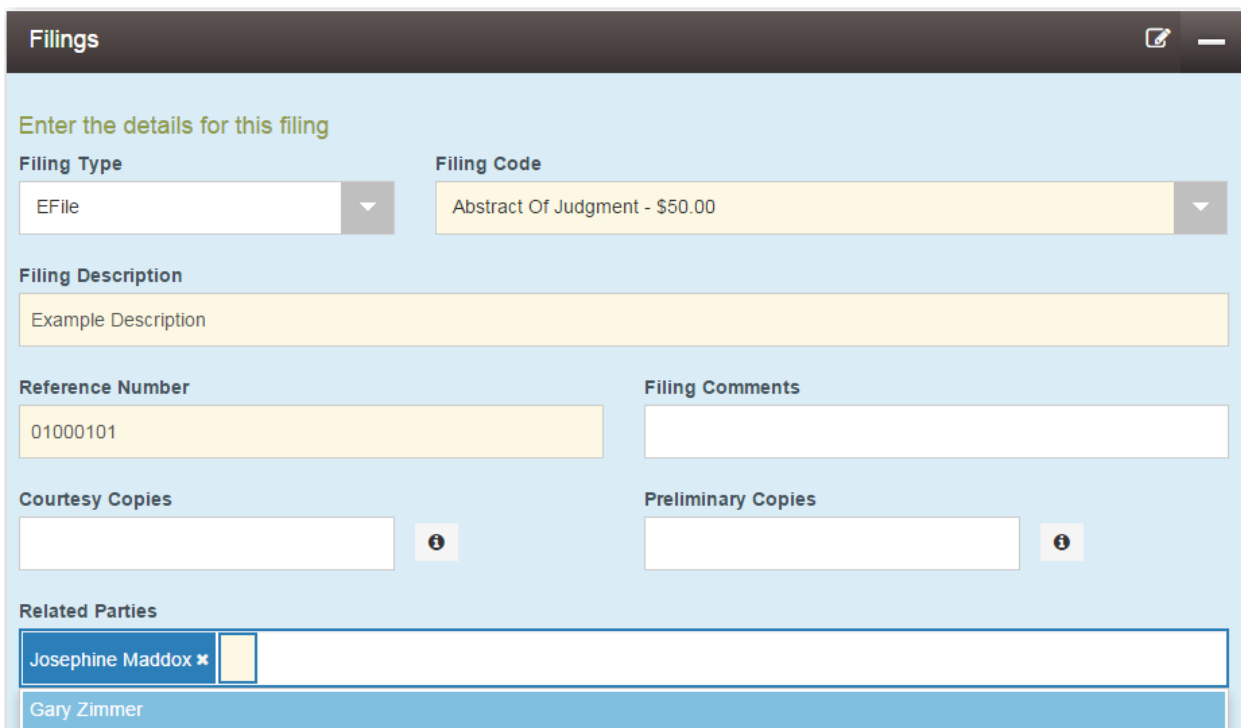


Figure 8.12 – Related Parties in the Filings Section

- i. Click the **Lead Document** field to select a lead document to load.

Note: This field is required. Only one document can be uploaded as a lead document.

Figure 8.13 – Lead Document and Attachments Fields in the Filings Section

- j. Type a name for the lead document in the **Description** field.
- k. Click the drop-down list in the **Security** field to select the level of security to attach to the document.

Figure 8.14 – Security Field Drop-Down List in the Lead Document Section

- l. If you have attachments to load, click the **Attachments** field to select the documents to load.

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.

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

If you save your changes, a section called **Optional Services** is displayed.

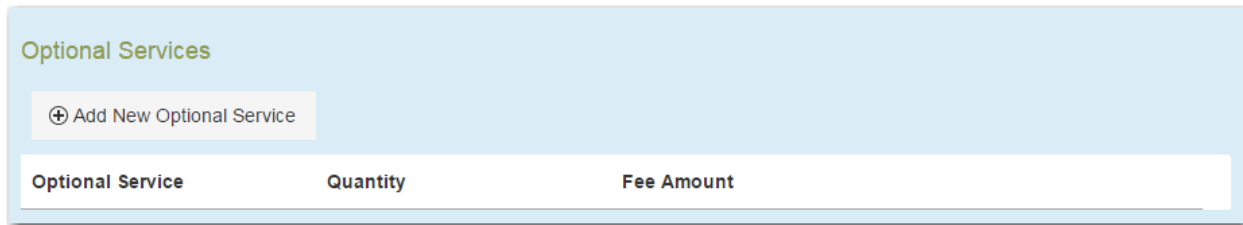
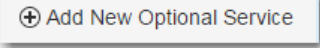


Figure 8.15 – Optional Services Section

- n. Click  to add an optional service to the lead document.

The **Optional Service** field is displayed.

- o. Select a service from the drop-down list in the **Optional Service** field.

Note: The fee associated with the optional service is displayed.

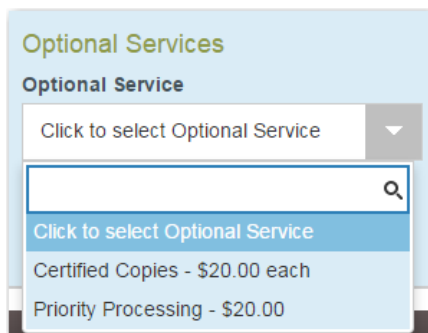

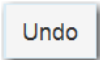


Figure 8.16 – Optional Service Drop-Down List

- p. Click  to save your changes, or click  to cancel the action.
9. 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.

Fees

▼ Acknowledgement

Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	
Total Filing Fee	\$0.00
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total: \$2.00	

Party Responsible for Fees

Click to select Party Responsible for Fees

Payment Account

Click to select Payment Account

Filer Type

Click to select Filer Type

Undo Save Changes

Figure 8.17 – Fees Section

- Select the party that is responsible for paying the fees in the **Party Responsible for Fees** field.
- Select the payment account from the drop-down list in the **Payment Account** field.

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.

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

Filer Type

Click to select Filer Type

Click to select Filer Type

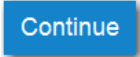
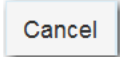
AutoReview

Default

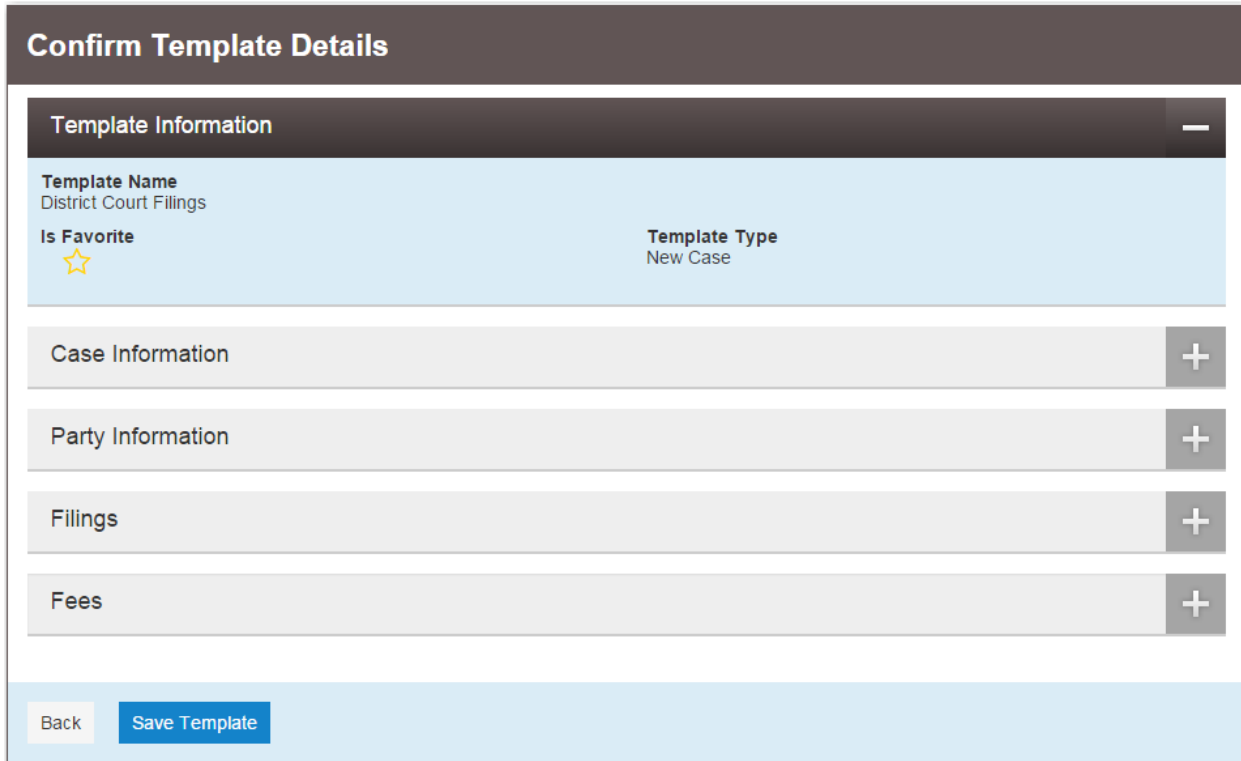
ProSe

Figure 8.18 – Filer Type Drop-Down List

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

10. Click  to continue creating the template, or click  to cancel the template creation.


Clicking  opens the *Confirm Template Details* page.



Confirm Template Details

Template Information —

Template Name
District Court Filings

Is Favorite  **Template Type**
New Case

Case Information +


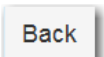
Party Information +



Filings +

Fees +

Back Save Template

Figure 8.19 – Confirm Template Details Page

11. Review the template details and click  to save the template, or click  to go back to the previous page.

Note: 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 (). 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 opens.

Templates			
Search			+ New Template
Favorite	Name	Type	
☆	District Court Filings	New Case	Actions ▾
☆	Family Law	Existing Case	Actions ▾

Figure 8.20 – 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.

Continue

4. When you are done modifying the template, click

The *Confirm Template Details* page is displayed.

Save Template

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

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, select **Templates**.

The *Templates* page opens.

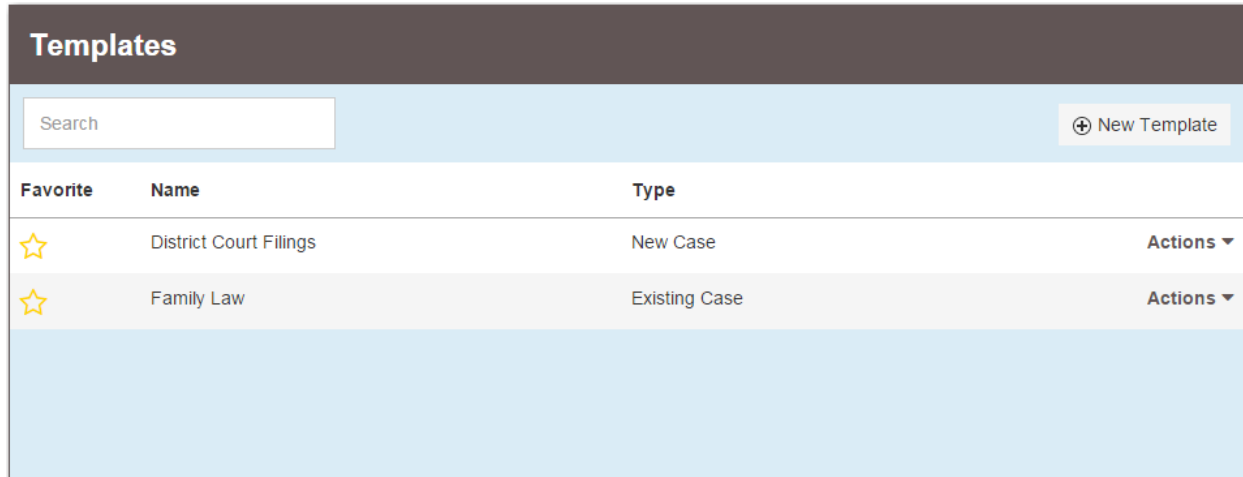





Figure 8.21 – Templates Page


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  or .

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

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

USING AN EXISTING CASE TEMPLATE

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

Perform the following steps to access an existing case to begin a filing:

1. Select one of the following methods to begin your filing:
 - Click **File into Existing Case** from the *Filer Dashboard* page.

Filer Dashboard

My Filing Activity

Pending	1
Accepted	3
Returned	
Drafts	1
Served	
View All	

New Filing

Start a New Case [Use a Template](#)

File into Existing Case

[Need help getting started?](#)

Figure 8.22 – Filer Dashboard Page

i Note: The *File Into Existing Case* page opens. Click Search to locate the case that you want.

File Into Existing Case

Location: All Locations Case Number: CV-2015-000011

Party is a Business/Agency:

First Name: Middle Name: Last Name:

Case Type: Sort results by: Case Number

Search Clear Search

Figure 8.23 – File Into Existing Case Page

i Note: When the correct case is displayed, select File Into Case With Template from the Actions drop-down list for the specified case.



Figure 8.24 – Case Actions Drop-Down List

- Select **File Into Existing Case** from the **Actions** drop-down list.
 - ⓘ **Note:** The *File Into Existing Case* page opens. Click **Search** to locate the case that you want. When the correct case is displayed, select **File Into Case With Template** from the **Actions** drop-down list for the specified case.
- From 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 With Template**.

Filing History						Q
Filing Status	Filing Code	Filing Type	Filing Description	Ref Number		
▶	Case # CC-15-1597					Actions ▼
	Draft # 42591 started Monday, October 05, 2015 at 4:45 PM CDT by Individual Filer					
▼	Case # CC-15-1681					Actions ▼
	Draft # 37044 started Thursday, September 03, 2015 at 1:13 PM CDT by Individual Filer					
▼	Envelope # 27765					Actions ▼
	Envelope # 27765 filed Monday, July 27, 2015 at 11:22 AM CDT by Individual Filer					
Submitted	Agreement	EFile				Actions ▼
▼	Envelope # 27763					Actions ▼
	Envelope # 27763 filed Monday, July 27, 2015 at 11:16 AM CDT by Individual Filer					
Submitted	Assignment	EFile				Actions ▼
▼	Case # CC-15-1597					Actions ▼
	Draft # 39 started Wednesday, April 29, 2015 at 11:12 AM CDT by Individual Filer					
Draft	Additional Conditions Of Pr...	EFileAndServe	Filing Code	CC-15-1597		Actions ▼
▼	Envelope # 38					Actions ▼
	Envelope # 38 filed Monday, July 27, 2015 at 11:03 AM CDT by Individual Filer					
⏪ ◀ 1 ▶ ⏩ 20 items per page						1 - 7 of 7 items ↻
Back						

Figure 8.25 – Filing History Page

The *Existing Case Templates* page opens.

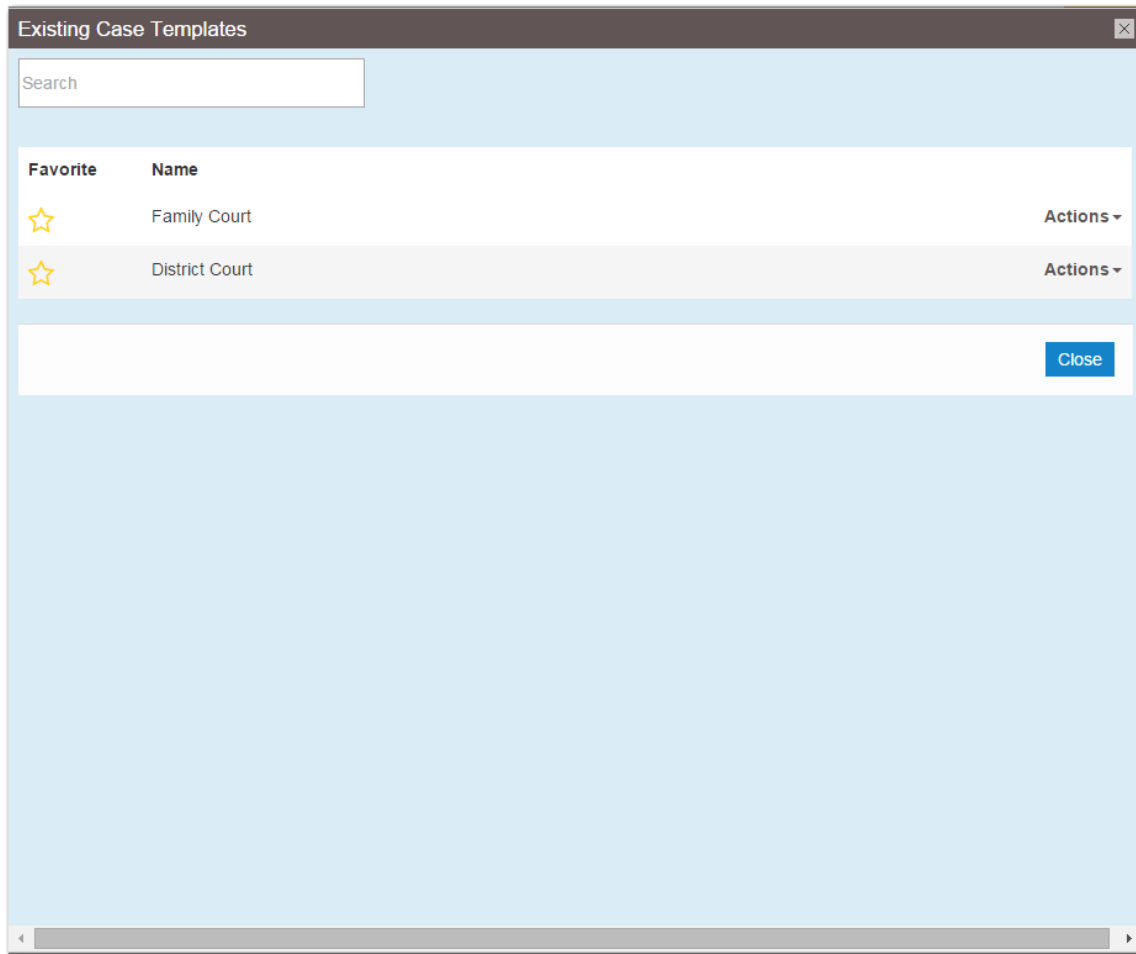


Figure 8.26 – Existing Case Templates Page

2. 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**.

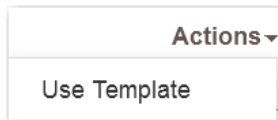


Figure 8.27 – Actions Drop-Down List for Existing Case Templates



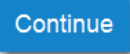


The template that you selected is displayed. The **Case Information** and **Party Information** fields are already populated since this is an existing case. You can add additional parties.

3. Complete the filing details in the **Filings** section:
 - a. Select the filing type from the drop-down list in the **Filing Type** field.
 - b. Select the filing code from the drop-down list in the **Filing Code** field.
 - c. Type a description of the filing in the **Filing Description** field.
 - d. If applicable, complete the information in the **Reference Number**, **Filing Comments**, and **Courtesy Copies** fields.
 - e. 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.

- f. If you want to associate any parties to the case, click the **Related Parties** field to select the parties from the drop-down list that is displayed.

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

- g. After completing the required fields, click .
4. Complete the fields in the **Fees** section.
5. Click either  or . Clicking  displays a page that reflects your filing. Review the page, and then click .

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

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.

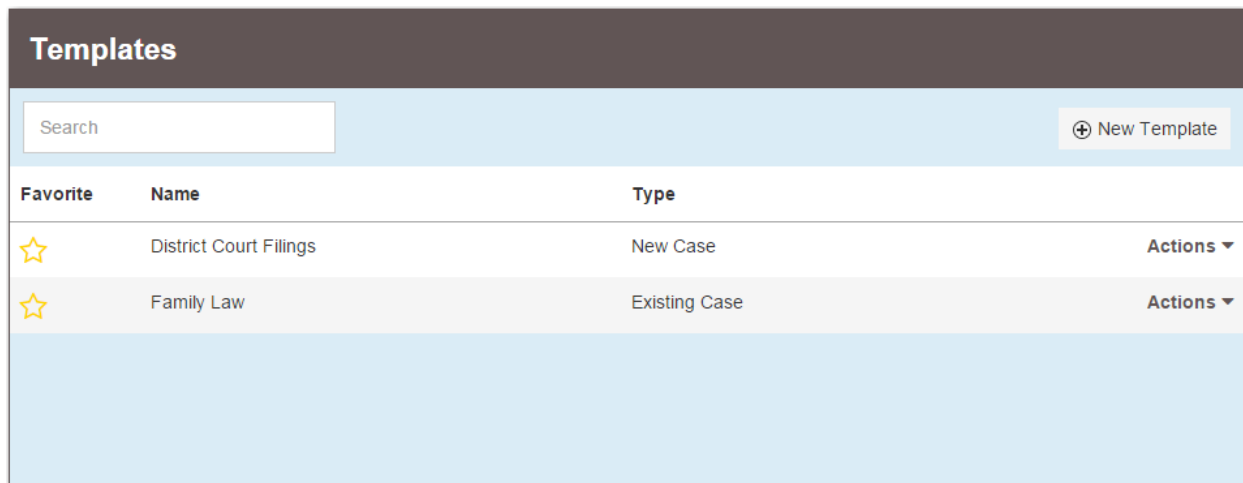
VIEWING TEMPLATE DETAILS

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 opens.



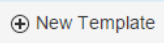


Templates			
Search			
Favorite	Name	Type	
	District Court Filings	New Case	Actions ▾
	Family Law	Existing Case	Actions ▾

Figure 8.28 – 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 opens.

Templates			
<input type="text" value="Search"/>			+ New Template
Favorite	Name	Type	
☆	District Court Filings	New Case	Actions ▾
☆	Family Law	Existing Case	Actions ▾

Figure 8.29 – 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.

CHAPTER 9 CASE INITIATION

TOPICS COVERED IN THIS CHAPTER

- ◆ FILING A NEW CASE
- ◆ ENTERING PARTY DETAILS
- ◆ ENTERING FILING DETAILS
- ◆ SUBMISSION AGREEMENTS
- ◆ VIEWING THE ENVELOPE SUMMARY

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

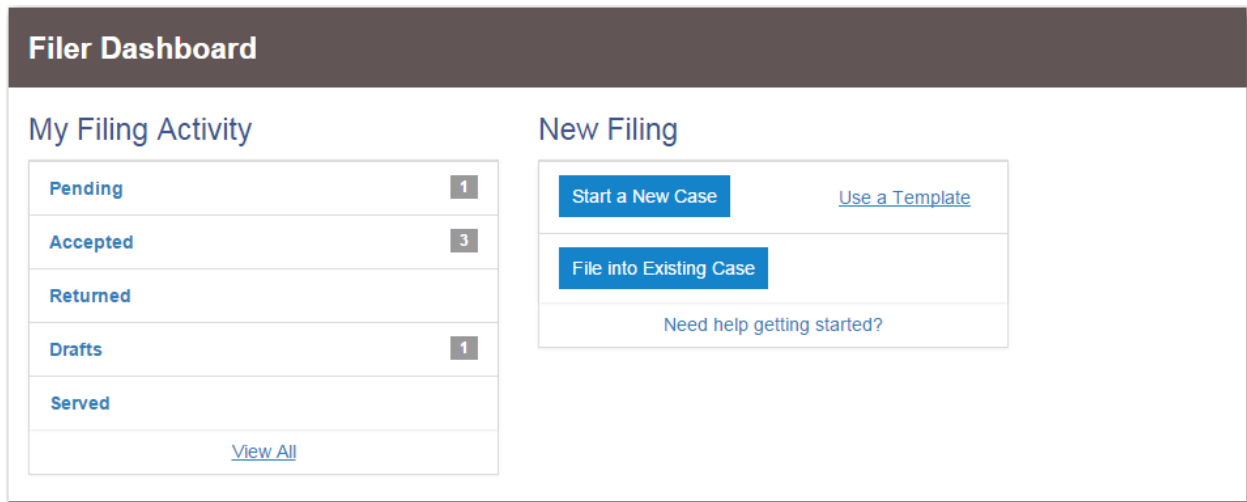


Figure 9.1 – Filer Dashboard Page

FILING A NEW CASE

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

Perform the following steps to file a new case:

1. Select **Start a New Case** from the **Actions** drop-down list, or click **Start a New Case** from the **Filer Dashboard** under the **New Filing** header.

The *Add Filing* page opens.

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 location (i.e., the court where you will be doing the filing).
- b. Select your category. (This field is determined by the location you selected.)
- c. Select your case type. (This field is determined by the category you selected.)

Note: The fee associated with the case type is displayed.

The screenshot shows a 'Case Information' form with three dropdown menus. The 'Location' dropdown is set to '12th District (VC, QA-2012-NM)'. The 'Category' dropdown is set to 'Family - FAM'. The 'Case Type' dropdown is set to 'Abuse & Neglect - \$117.00'.

Figure 9.2 – Case Type Field with Fees Displayed

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.

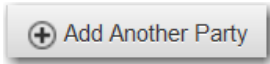
ENTERING PARTY DETAILS

Each case requires a party type.

Note: Required fields are shown with a red outline around the field. You must complete all required information for the party types in the fields provided.

Perform the following steps to enter the details for the parties involved in the case:

1. Complete the fields in the **Party Information** section. If you want to add another party to the filing, click



, and then enter the party information in the required fields:

- a. Enter the party type (for example, **Defendant/Plaintiff**). Indicate whether the party is a business by selecting **Party is a Business**.
- b. Select an attorney from the drop-down list.
- c. Complete the **First Name**, **Middle Name** (if applicable), and **Last Name** fields.
- d. Select the country from the drop-down list.

The screenshot shows a 'Country' dropdown menu. The selected option is 'United States of America'. Below the dropdown is a search box with a magnifying glass icon. Below the search box are the options: 'Click to select Country', 'Canada', 'Mexico', and 'United States of America' (which is highlighted).


Figure 9.3 – Country Drop-Down List


- e. 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, Province, Postal Code, Phone Number, and Filer ID** fields.

i Note: Select the province from the Province drop-down list.

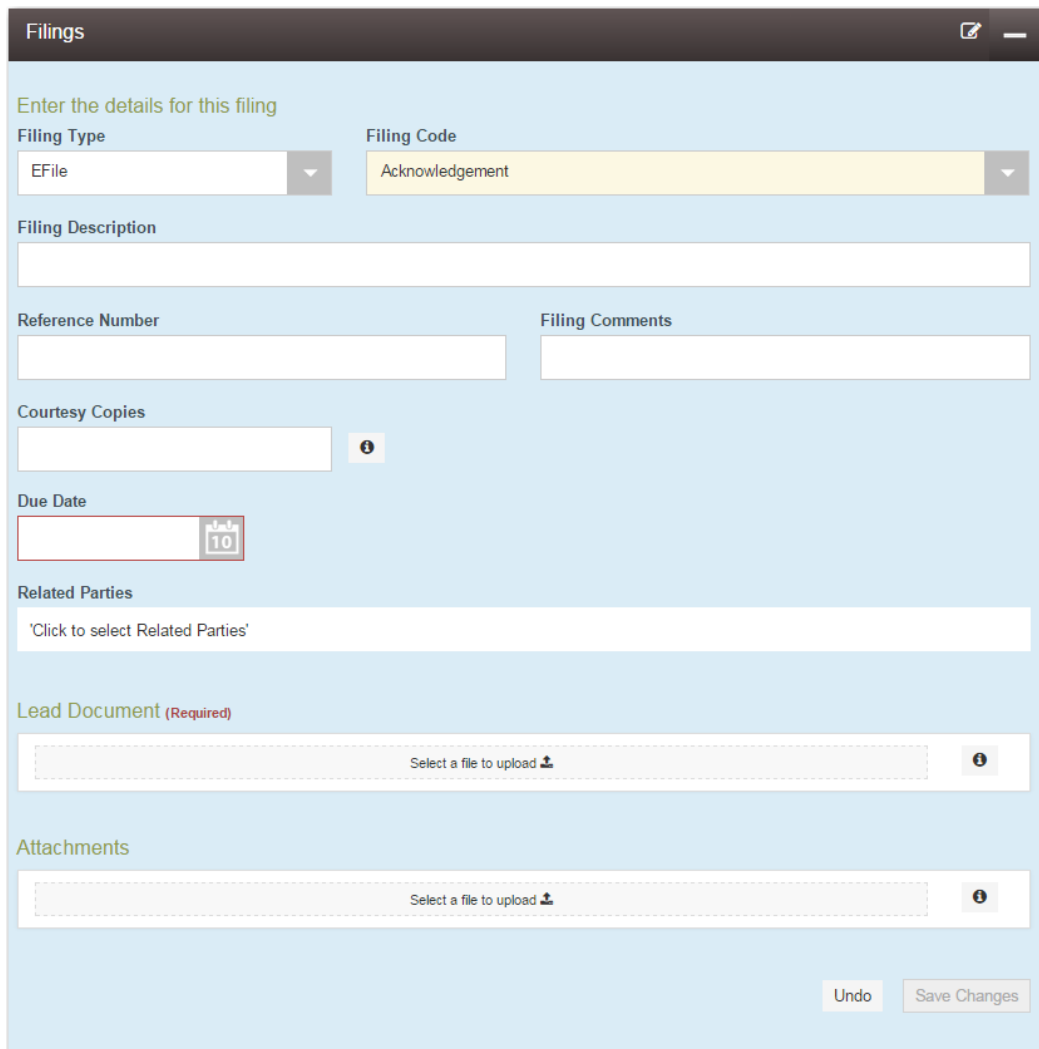
2. After completing the required fields, click  .
3. Complete the same party information for the other party.

4. After completing the required fields, click  .

i 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.



The screenshot shows a web form titled "Filings" with a dark header bar. Below the header, the form is divided into several sections:

- Enter the details for this filing:** This section contains two dropdown menus. The "Filing Type" dropdown is set to "EFile", and the "Filing Code" dropdown is set to "Acknowledgement".
- Filing Description:** A large text input field.
- Reference Number:** A text input field.
- Filing Comments:** A text input field.
- Courtesy Copies:** A text input field with an information icon (i) to its right.
- Due Date:** A date input field with a calendar icon showing the date 10.
- Related Parties:** A text input field with the placeholder text "'Click to select Related Parties'".
- Lead Document (Required):** A file upload field with the text "Select a file to upload" and a file icon, and an information icon (i) to its right.
- Attachments:** A file upload field with the text "Select a file to upload" and a file icon, and an information icon (i) to its right.

At the bottom right of the form, there are two buttons: "Undo" and "Save Changes".

Figure 9.4 – 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.

The screenshot shows a web form titled "Filings" with a header bar containing a pencil icon and a minus sign. Below the header, the text "Enter the details for this filing" is displayed. The form has several fields: "Filing Type" (a dropdown menu with "EFile" selected), "Filing Code" (a dropdown menu with "Click to select Filing Code" selected and a search icon), "Filing Description" (a text input field), "Reference Number" (a text input field), and "Courtesy Copies" (a text input field). The "Filing Code" dropdown is open, showing a list of options: "Click to select Filing Code", "A Non-Docketed Event", "Abstract Of Judgment - \$50.00", "Acknowledgement", "Acknowledgment Of Paternity - \$100.00", and "Acquittal".

Figure 9.5 – Filing Code Drop-Down List

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

The screenshot shows the same "Filings" form as in Figure 9.5, but now the "Filing Code" dropdown menu is closed and displays "Abstract Of Judgment - \$50.00". The "Filing Type" dropdown remains at "EFile".

Figure 9.6 – Filing Code Field with Fee Displayed

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

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

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

- e. Type any relevant comments in the **Filing Comments** 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. 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.

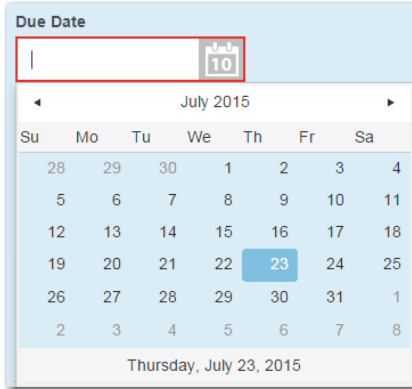


Figure 9.7 – Due Date Calendar

- h. Click the **Related Parties** field to select the parties from the drop-down list.

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

Figure 9.8 – Related Parties in the Filings Section

- i. Click the **Lead Document** field to select a lead document to load.

Note: This field is required. Only one document can be uploaded as a lead document.

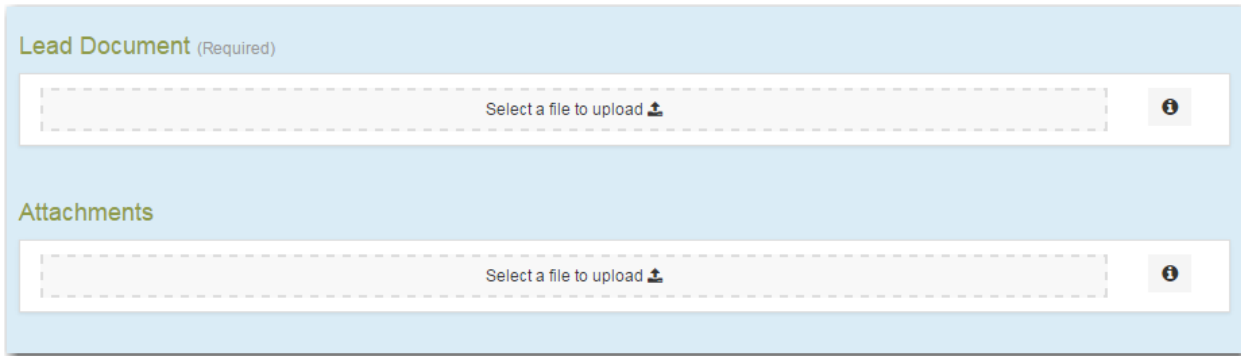


Figure 9.9 – Lead Document and Attachments Fields in the Filings Section

- j. Type a name for the lead document in the **Description** field.
- k. Click the **Security** drop-down list to select the level of security to attach to the document.

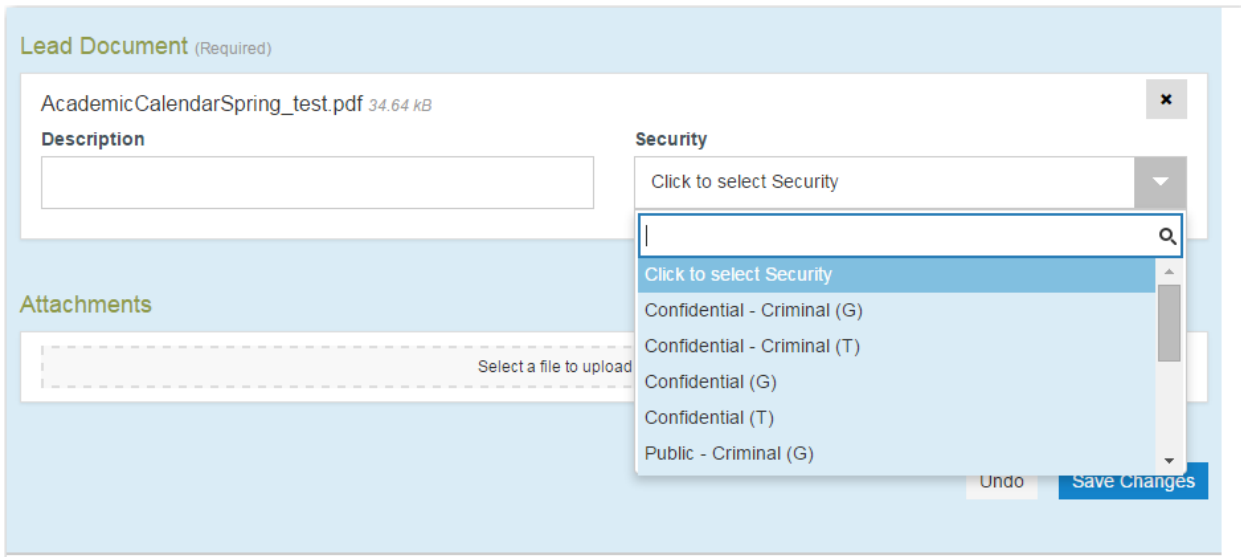


Figure 9.10 – Security Field Drop-Down List in the Lead Document Section

- l. If you have attachments to load, click the **Attachments** field to select the documents to load.

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.

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

If you save your changes, a section called **Optional Services** is displayed.

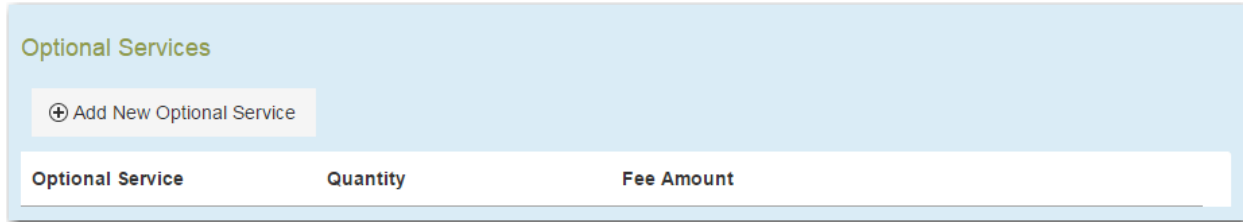
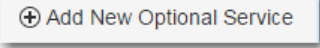


Figure 9.11 – Optional Services Section

- n. Click  to add an optional service to the lead document.

The **Optional Service** field is displayed.

- o. Select a service from the **Optional Service** drop-down list.

Note: The fee associated with the optional service is displayed.

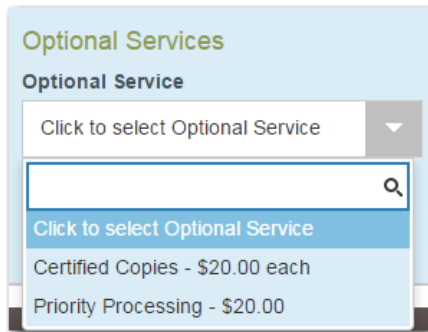

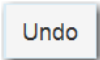


Figure 9.12 – Optional Service Drop-Down List

- p. Click  to save your changes, or click  to cancel the action.
2. 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.

Fees

▼ Acknowledgement

Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	
Total Filing Fee	\$0.00
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total: \$2.00	

Party Responsible for Fees

Payment Account

Filer Type

Undo Save Changes

Figure 9.13 – Fees Section

- a. Select the party that is responsible for paying the fees in the **Party Responsible for Fees** 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 filer type from the **Filer Type** drop-down list.

Filer Type

Click to select Filer Type

Click to select Filer Type

AutoReview

Default

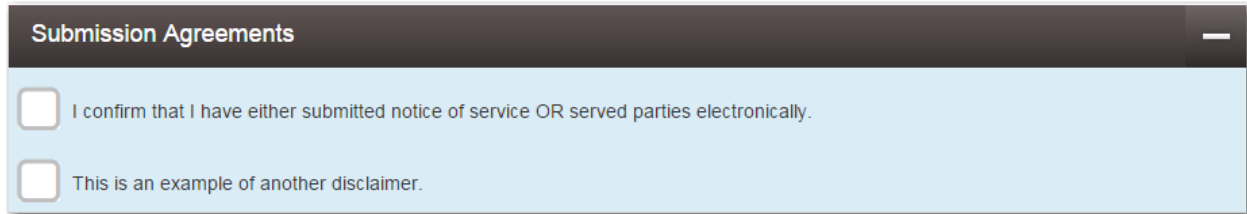
ProSe

Figure 9.14 – Filer Type Drop-Down List

- d. Click to save your changes, or click to cancel the action.

3. 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.

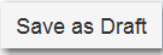
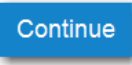


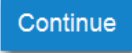
Submission Agreements



I confirm that I have either submitted notice of service OR served parties electronically.


This is an example of another disclaimer.

Figure 9.15 – Submission Agreements Section

4. After completing the fields in all of the sections on the page, click , or click .

Clicking  displays a page that reflects your filing.

5. Review the page for accuracy. If you need to make any changes, click  to return to the previous page. Make any necessary corrections, and then click .

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

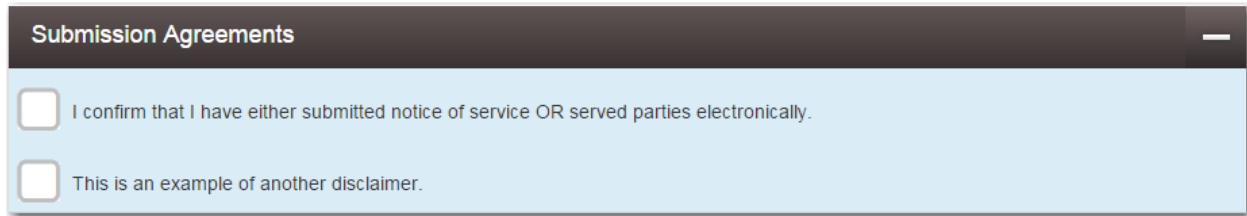
A new **Envelope** of your filing is included on the *Filing History* page.

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.

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.



Submission Agreements

I confirm that I have either submitted notice of service OR served parties electronically.

This is an example of another disclaimer.

Figure 9.16 – 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.

Perform the following steps to view the envelope summary:

1. From the *Filing History* page, locate the envelope for which you want to view the summary. Select **View Filing Details** from the **Actions** drop-down list for the specified envelope.

The *Envelope* page opens.

Envelope # 38

Envelope Information

Envelope Id 38	Submitted Date 7/27/2015 11:03 AM CDT	Submitted User Name Indie.filer@jyletech.com
-------------------	--	---

Case Information

Location OFS GA 2014 VC - Court at Law 2	Category Civil	Case Type Damages
Firm Name Individual	Filed By Individual Filer	

Party Information

Party Type	Party Name	Attorney
Defendant	Johnson Floors	
Plaintiff	Nicolas Johnson	

Filings

Filing Code	Reference Number	Filing Description
Assignment		

Filing Details

Filing Type EFile	Filing Code Assignment
Filing Status Submitted	

Lead Document

File Name	Description	Security	Download
AcademicCalendar/Spring_test.pdf 34.04 KB			Original File

Service Contacts

Serve	Name	Email
▶	Party: Johnson Floors - Defendant	
▶	Party: Nicolas Johnson - Plaintiff	
▶	Other Service Contacts	

Fees

▼ Assignment		Description	Amount
		Filing Fee	\$0.00
			Filing Total: \$0.00
			Total Filing Fee
			\$0.00
			Envelope Total: \$0.00
Party Responsible for Fees	Johnson Floors		
Payment Account	Waiver		
Filer Type	Default		

[View Filing History](#)
[View Receipt](#)

Figure 9.17 – Envelope # 38 Page

- To return to the *Filing History* page, either select **Filing History** from the **Actions** drop-down list, or click

[View Filing History](#)

CHAPTER 10 EXISTING CASE FILING

TOPICS COVERED IN THIS CHAPTER

- ◆ FILING INTO AN EXISTING CASE
- ◆ FILING AN APPEAL TO AN EXISTING CASE

FILING INTO AN EXISTING CASE

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

Perform the following steps to file into an existing case:

1. Select one of the following methods to begin your filing:

- Click **File into Existing Case** from the *Filer Dashboard* page.

i Note: The *File Into Existing Case* page opens. Click **Search** to locate the case that you want.

The screenshot shows the 'File Into Existing Case' page. The header is dark with the title 'File Into Existing Case'. Below the header, there are several input fields: 'Location' (dropdown menu showing 'All Locations'), 'Case Number' (text input showing 'CV-000288-2015'), 'Party is a Business' (checkbox), 'First Name', 'Middle Name', and 'Last Name' (text inputs), 'Case Type' (dropdown menu showing 'All Case Types'), and 'Sort results by' (dropdown menu showing 'Case Number'). At the bottom, there are 'Search' and 'Clear Search' buttons.

Figure 10.1 – File Into Existing Case Page

i Note: When the correct case is displayed, select **File Into Case** from the **Actions** dropdown list for the specified case.



Figure 10.2 – Actions Drop-Down List

- Select **File Into Existing Case** from the **Actions** drop-down list. **Note: The *File Into Existing Case* page opens. Click Search to locate the case that you want. When the correct case is displayed, select File Into Case from the Actions drop-down list for the specified case.**
- From 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**.

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



Figure 10.3 – Party Information Section Expanded for Existing Cases

When more than 100 parties are on a case, only the first party of each required type is displayed, along with a message that additional parties could not be displayed due to system constraints. Add additional parties to the case if you want.

Case # CC-15-230

Case Information

Location OFS QA 2013 - Court at Law 2	Category Civil	Case Type Appeal
Lower Court/Agency #	Case # CC-15-230	
Date Filed 5/19/2015	Firm Name Individual	Filed By Individual Filer

Party Information

1612 additional parties excluded due to system constraints.

Party Type	Party Name	Attorney
Defendant	Jane Defendant	
Plaintiff	John Plaintiff	

Figure 10.4 – Case Information and Party Information Sections on Case # CC-15-230 Page

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

Filings

Enter the details for this filing

Filing Type: EFile

Filing Code: Acknowledgement

Filing Description

Reference Number

Filing Comments

Courtesy Copies

Due Date

Related Parties

'Click to select Related Parties'

Lead Document (Required)

Select a file to upload

Attachments

Select a file to upload

Undo Save Changes

Figure 10.5 – 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.

The screenshot shows a dropdown menu for the 'Filing Type' field. The selected option is 'EFile'. Below the dropdown, a search bar is visible with a magnifying glass icon. The search results list 'EFile', 'Serve', and 'EFileAndServe'.

Figure 10.6 – Filing Type Field

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

The screenshot shows the 'Filings' form with the 'Filing Code' dropdown menu open. The 'Filing Type' field is set to 'EFile'. The 'Filing Code' dropdown menu is highlighted with a red border and shows a search bar and a list of options: 'Click to select Filing Code', 'A Non-Docketed Event', 'Abstract Of Judgment - \$50.00', 'Acknowledgement', 'Acknowledgment Of Paternity - \$100.00', and 'Acquittal'.

Figure 10.7 – Filing Code Field with Drop-Down List Displayed

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

The screenshot shows the 'Filings' form with the 'Filing Code' field selected. The 'Filing Type' field is set to 'EFile'. The 'Filing Code' field now displays 'Abstract Of Judgment - \$50.00'.

Figure 10.8 – Filing Code Field with Fee Displayed

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

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

- e. Type any relevant comments in the **Filing Comments** 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. 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.

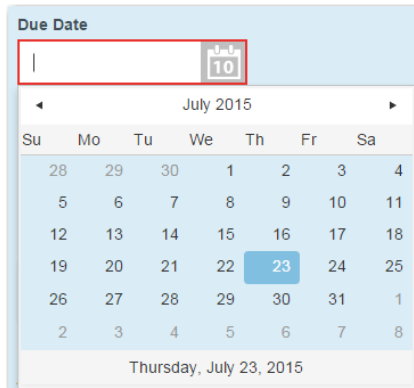


Figure 10.9 – Due Date Calendar

- h. Click the **Related Parties** field to select the parties from the drop-down list that is displayed.

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

The image shows a 'Filings' form with the following fields:

- Filing Type:** EFile
- Filing Code:** Abstract Of Judgment - \$50.00
- Filing Description:** Example Description
- Reference Number:** 01000101
- Filing Comments:** (empty)
- Courtesy Copies:** (empty)
- Preliminary Copies:** (empty)
- Related Parties:** Josephine Maddox, Gary Zimmer

Figure 10.10 – Related Parties in the Filings Section

- i. Click the **Lead Document** field to select a lead document to load.

Note: This field is required. Only one document can be uploaded as a lead document.

Figure 10.11 – Lead Document and Attachments Fields in the Filings Section

- j. Type a name for the lead document in the **Description** field.
- k. Click the drop-down list in the **Security** field to select the level of security to attach to the document.

Figure 10.12 – Security Field Drop-Down List in the Lead Document Section

- l. If you have attachments to load, click the **Attachments** field to select the documents to load.

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.

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

If you save your changes, a section called **Optional Services** is displayed.

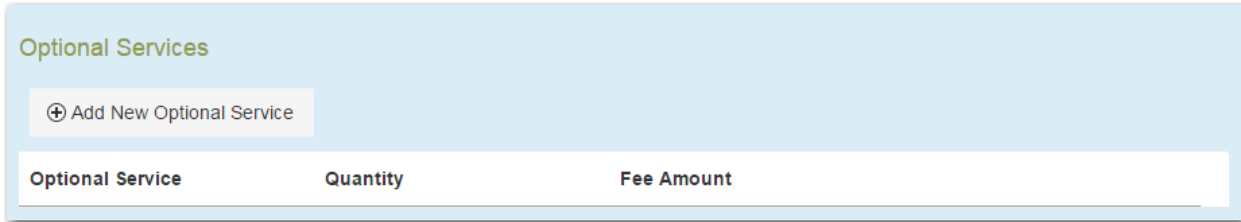
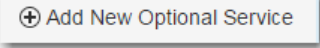


Figure 10.13 – Optional Services Section

- n. Click  to add an optional service to the lead document.

The **Optional Service** field is displayed.

- o. Select a service from the drop-down list in the **Optional Service** field.

Note: The fee associated with the optional service is displayed.

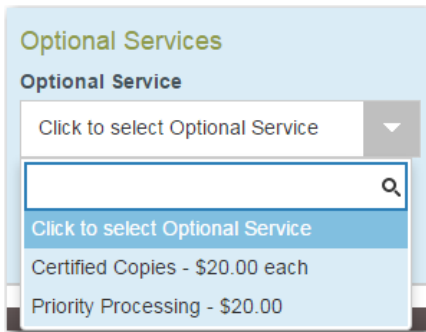

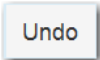


Figure 10.14 – Optional Service Drop-Down List

- p. Click  to save your changes, or click  to cancel the action.
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.

Fees

▼ Acknowledgement

Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	
Total Filing Fee	\$0.00
E-File Fee	\$1.00
Court E-File Fee	\$1.00
Envelope Total: \$2.00	

Party Responsible for Fees

Click to select Party Responsible for Fees

Payment Account

Click to select Payment Account

Filer Type

Click to select Filer Type

Undo Save Changes

Figure 10.15 – Fees Section

- a. Select the party that is responsible for paying the fees in the **Party Responsible for Fees** field.
- b. Select the payment account from the drop-down list in the **Payment Account** field.

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

Filer Type

Click to select Filer Type

Click to select Filer Type

AutoReview

Default

ProSe

Figure 10.16 – Filer Type Drop-Down List

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

4. Click either **Save as Draft**, or click **Continue**.

Continue

Clicking displays a page that reflects your filing.

Submit

- Review the page, and then click .

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

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 AN APPELLATE 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:

- Select **Start a New Case** from the **Actions** drop-down list, or click **Start a New Case** from the **Filer Dashboard** under the **New Filing** header.

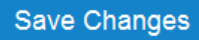
The *Add Filing* page opens.

- 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 10.17 – Appellate Selections in the Case Information Section

- Select your location (i.e., the court where you will be doing the filing).
- Select **Appellate** in the **Category** field.
- Select **Appellate Case** in the **Case Type** field.
- Type the original case number in the **Lower Court Case Number** field.
- Type the name of the lower court in the **Lower Court Name** field.
- Type the name of the lower court case judge in the **Lower Court Case Judge** field.
- Type a description of the original case in the **Lower Court Case Description** field.

A blue rectangular button with the text "Save Changes" in white, centered on the page.

3. After completing the required fields, click .

i 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.

CHAPTER 11 SERVICE CONTACTS

TOPICS COVERED IN THIS CHAPTER

- ◆ ADDING SERVICE CONTACTS TO THE FIRM
- ◆ ADDING SERVICE CONTACTS TO A CASE
- ◆ PUBLIC SERVICE CONTACTS
- ◆ ADDING SERVICE CONTACTS FROM A PUBLIC LIST
- ◆ SELECTING THE SERVICE METHOD FOR SERVICE CONTACTS
- ◆ VIEWING ATTACHED CASE LIST OF SERVICE CONTACTS
- ◆ LINKING A SERVICE CONTACT TO ANOTHER PARTY
- ◆ SEARCH AND PAGING CAPABILITY FOR SERVICE CONTACTS
- ◆ REMOVING A SERVICE CONTACT FROM A CASE
- ◆ DEACTIVATING A SERVICE CONTACT

You can view the current service contacts and add service contacts to a case.

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, click **Service Contacts**.

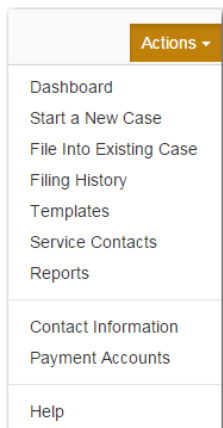
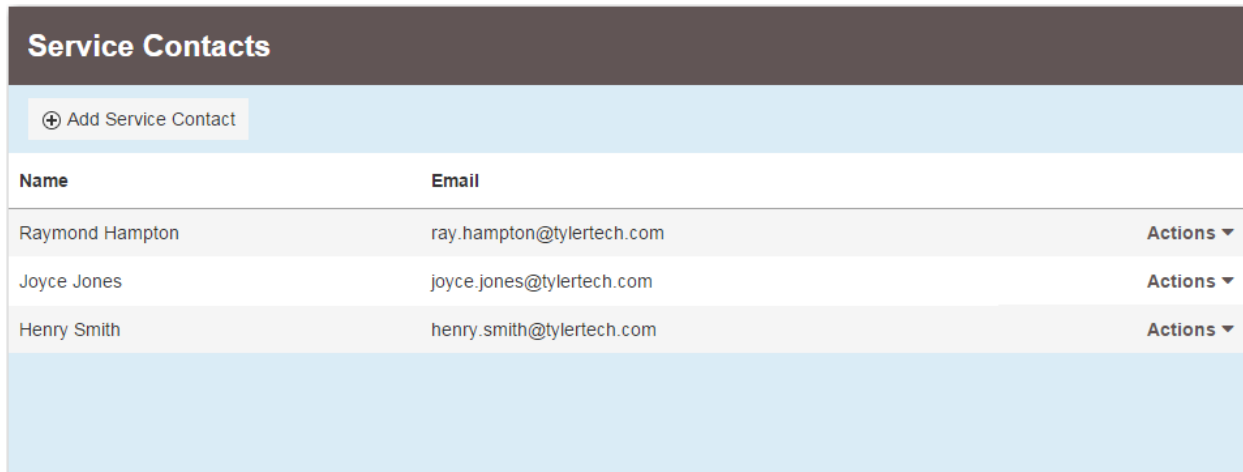


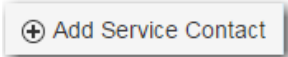
Figure 11.1 – Actions Drop-Down List

The *Service Contacts* page opens.



Service Contacts		
⊕ Add Service Contact		
Name	Email	
Raymond Hampton	ray.hampton@tylertech.com	Actions ▾
Joyce Jones	joyce.jones@tylertech.com	Actions ▾
Henry Smith	henry.smith@tylertech.com	Actions ▾

Figure 11.2 – Service Contacts Page

2. Click  .

The *Service Contacts* page opens.


Service Contacts

+ Add Service Contact

Name		Email	Actions
First Name	Middle Name	Last Name	
Firm Name	Email	Administrative Copy	
Country			
United States of America			
Address Line 1	Address Line 2	City	
5101 Tennyson Parkway		Plano	
State			
Texas			
Zip Code	Phone Number		
75024			
Make This Contact Public			
<input type="checkbox"/>			
		i	
		Undo	Save Changes

Figure 11.3 – 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  to save the contact, or click  to cancel the action.

If you click , the new contact information is displayed in the **Service Contacts** list.

ADDING SERVICE CONTACTS TO A CASE

Perform the following steps to add a service contact to a case:

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**.

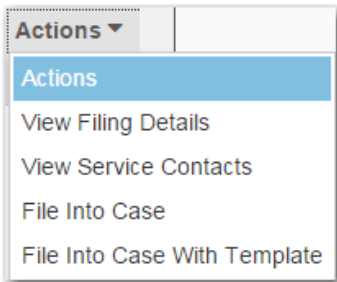


Figure 11.4 – Actions Drop-Down List

The *Service Contacts* page opens.

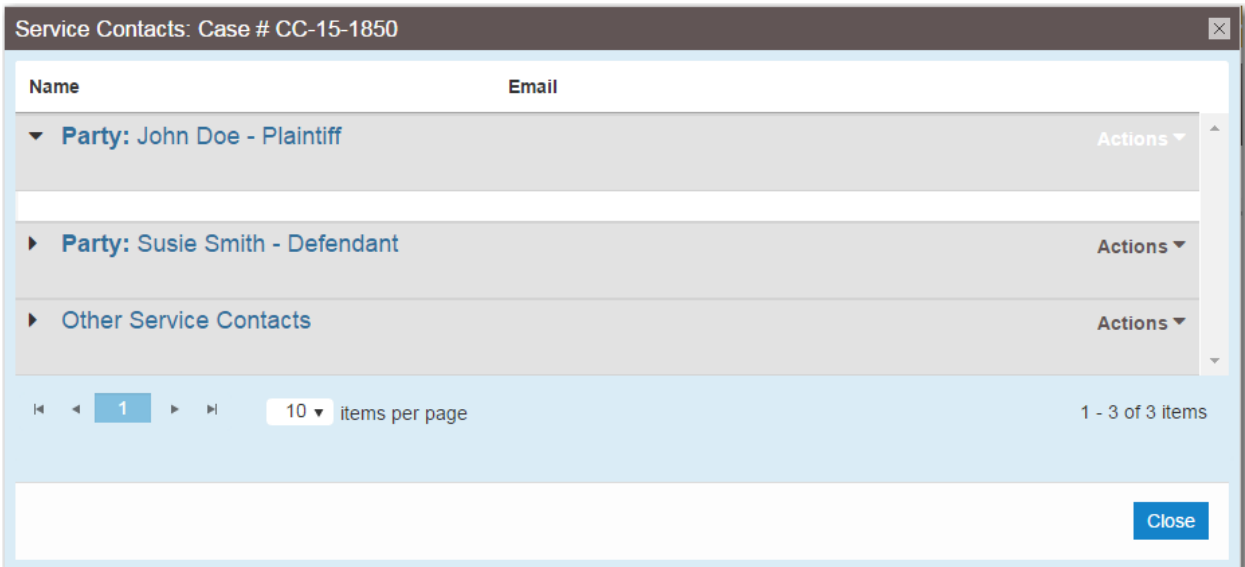


Figure 11.5 – Service Contacts Page

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 Service Contacts**.

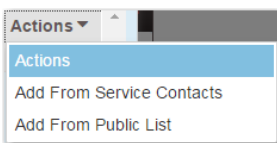


Figure 11.6 – Service Contacts Actions Drop-Down List

The *Add From Service Contacts* dialog box opens.

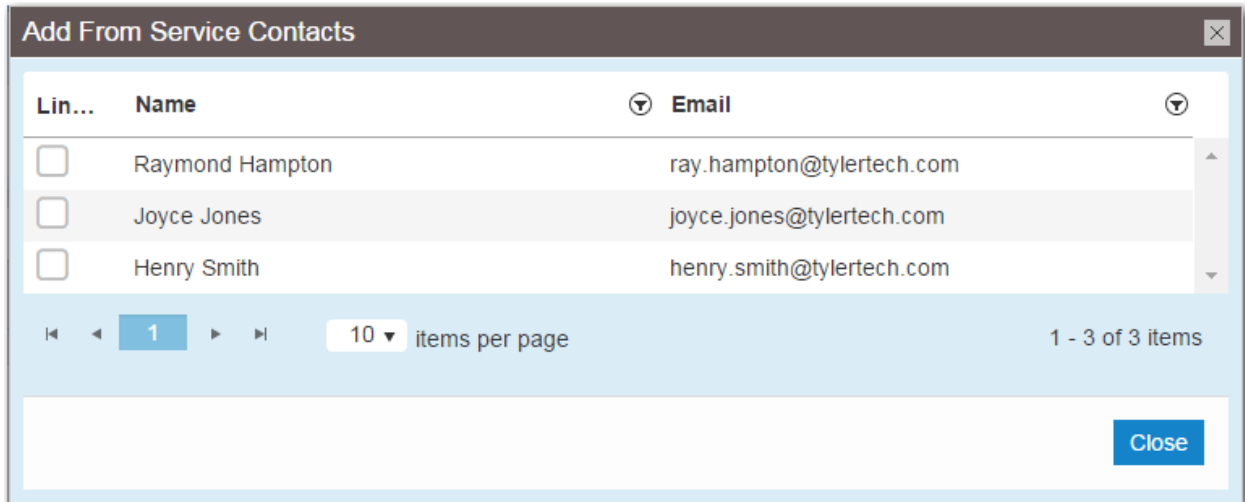



Figure 11.7 – Add From Service Contacts Dialog Box

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 .

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  to return to the *Filing History* page.

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.

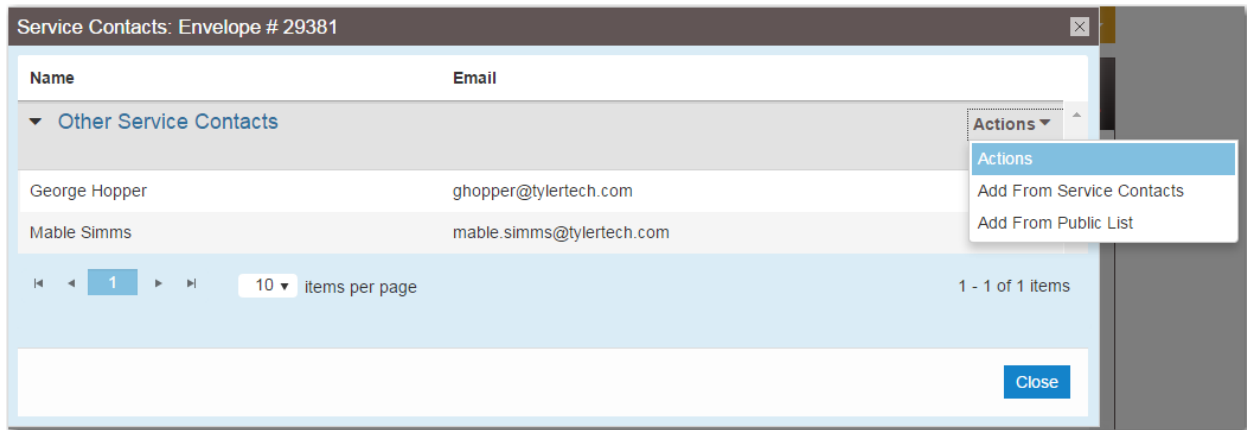


Figure 11.8 – Service Contacts: Envelope # 29381 Page

ADDING SERVICE CONTACTS FROM A PUBLIC LIST

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

Perform the following steps to add a service contact from a public list:

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**.

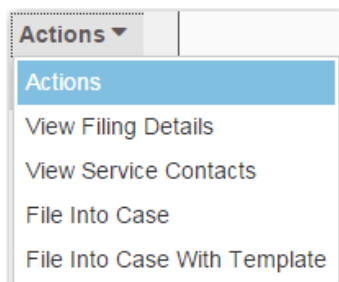


Figure 11.9 – Actions Drop-Down List

The *Service Contacts* page for the specified case opens.

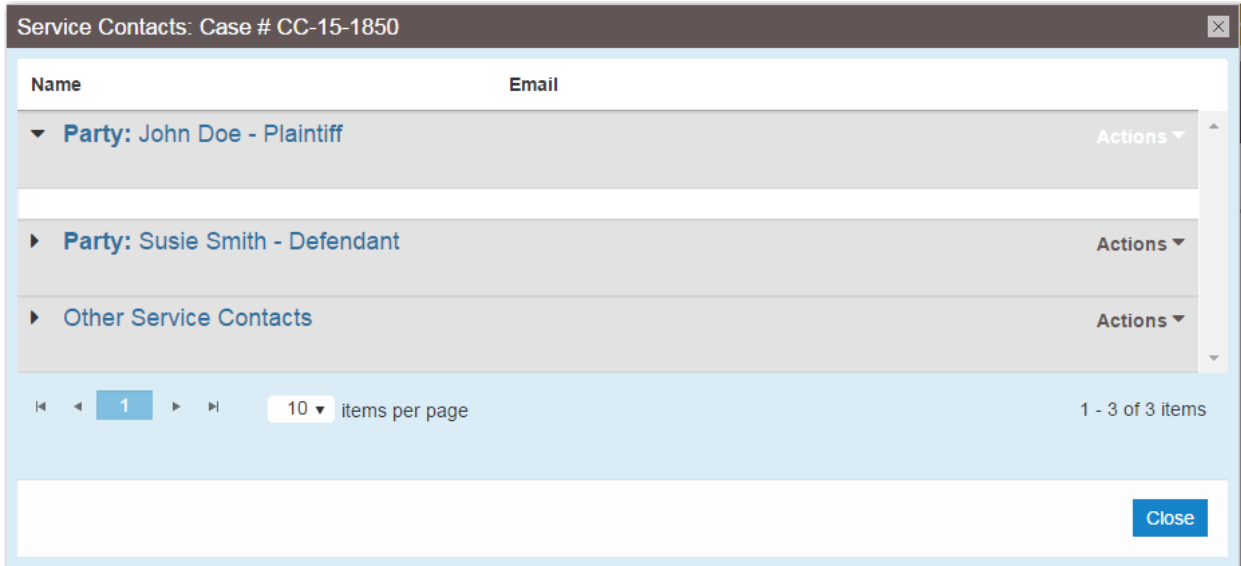


Figure 11.10 – Service Contacts: Case# CC-15-1850 Page

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**.

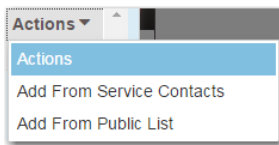


Figure 11.11 – Service Contacts Actions Drop-Down List

The *Add Service Contact from Public List* dialog box opens.

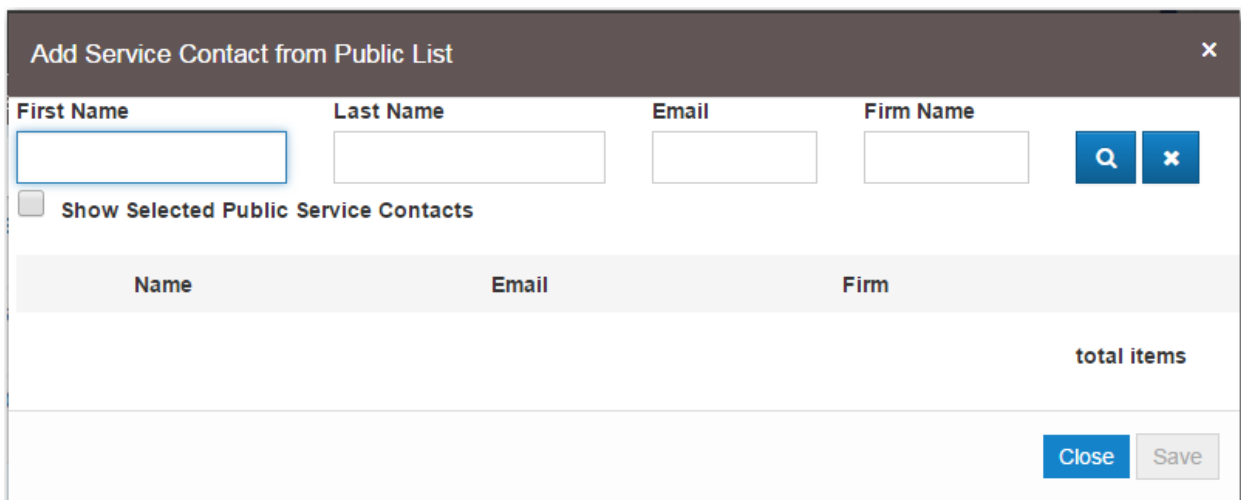


Figure 11.12 – Add Service Contact from Public List Dialog Box


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.


Name	Email	Firm
<input type="checkbox"/> Scott Adams	sadamsox@histats.com	System
<input type="checkbox"/> Lois Adams	ladams3u@businesswire.com	System
<input type="checkbox"/> Robin Adams	radams7v@liveinternet.ru	System
<input type="checkbox"/> Louis Adams	ladams7@slate.com	System
<input type="checkbox"/> Patrick Adams	padams85@eventbrite.com	System
<input type="checkbox"/> Theresa Adams	tadams14@nba.com	System
<input type="checkbox"/> Nicholas Adams	nadamsln@yellowbook.com	System
<input type="checkbox"/> Elizabeth Adams	eadamsm9@4shared.com	System
<input type="checkbox"/> Laura Adams	ladamsos@washington.edu	System
<input type="checkbox"/> Tina Adams	tadamsm3@amazon.de	System

Figure 11.13 – 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 .

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.

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.

Note: These steps are intended for individual filers.

To select the service method for a service contact when starting a new case, perform the following steps:

1. Select **Start a New Case** from the **Actions** drop-down list, or click **Start a New Case** from the **Filer Dashboard** under the **New Filing** header.

The *Add Filing* page opens.

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 Service Contacts**.

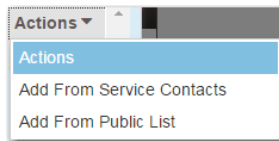


Figure 11.14 – Service Contacts Actions Drop-Down List

The *Add From Service Contacts* dialog box opens.

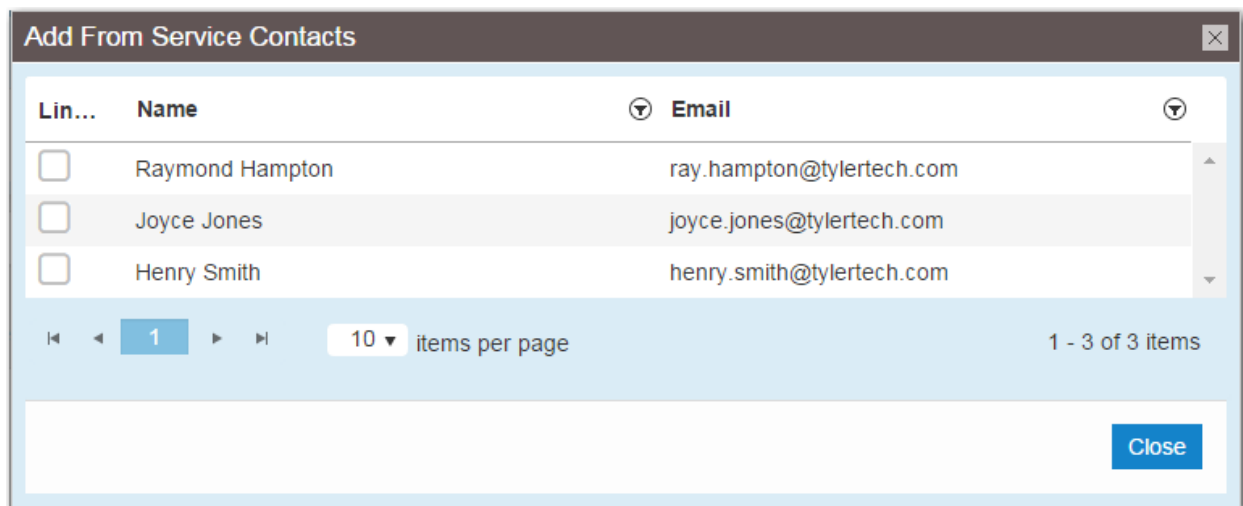


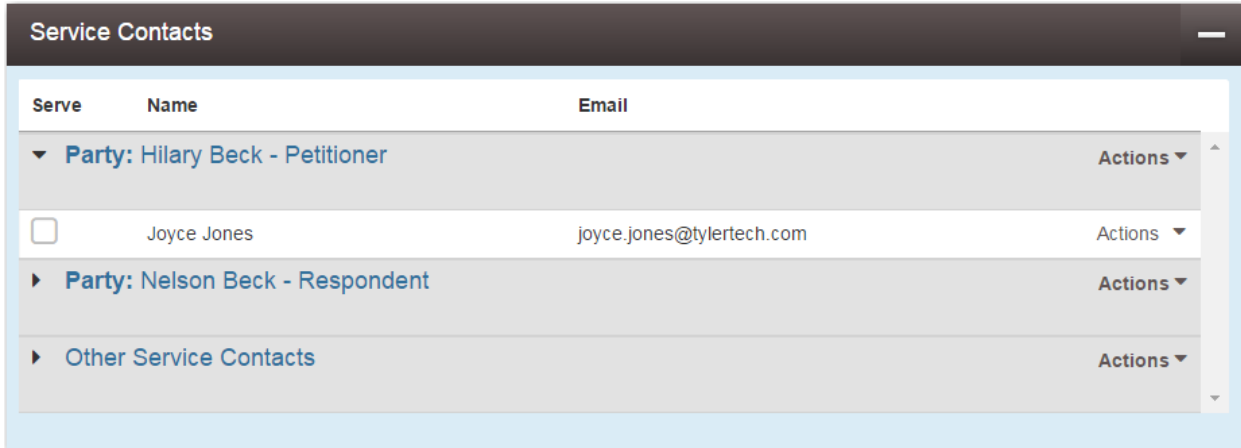
Figure 11.15 – Add From Service Contacts Dialog Box

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.



Serve	Name	Email	
▼	Party: Hilary Beck - Petitioner		Actions ▼
<input type="checkbox"/>	Joyce Jones	joyce.jones@tylertech.com	Actions ▼
▶	Party: Nelson Beck - Respondent		Actions ▼
▶	Other Service Contacts		Actions ▼

Figure 11.16 – 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.

Party: Hilary Beck - Petitioner

Service Method
 EServe

First Name Joyce **Middle Name** **Last Name** Jones

Firm Name **Email** joyce.jones@tylertech.com **Administrative Copy**

Country
 United States of America

Address Line 1 5101 Tennyson Parkway **Address Line 2** **City** Plano

State
 Texas

Zip Code 75024 **Phone Number**

Undo Save Changes

Figure 11.17 – Service Method Field in Service Contacts Section

9. Select the service method that you want from the 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.

Service Method

EServe

Mail

EServe

Figure 11.18 – Service Method Field Drop-Down List



10. Click **Save Changes**.

11. Continue with the rest of your filing (i.e., selecting the fees).

12. When done, click either [Save as Draft](#) or [Continue](#).

VIEWING ATTACHED CASE LIST OF SERVICE CONTACTS

To view the case list that is attached to a service contact, perform the following steps:

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

The *Service Contacts* page opens.

Name	Email	Actions
John Doe	john.doe@tylertech.com	Actions
Mary Doe	mary.doe@tylertech.com	Actions
Suzie Jones	suzie.jones@tylertech.com	Actions

Items per page: 10 3 total items

Figure 11.19 – 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**.

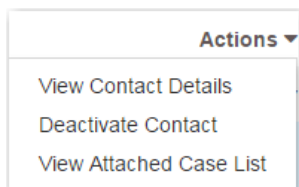


Figure 11.20 – Service Contacts Actions Drop-Down List

The attached case list is displayed.

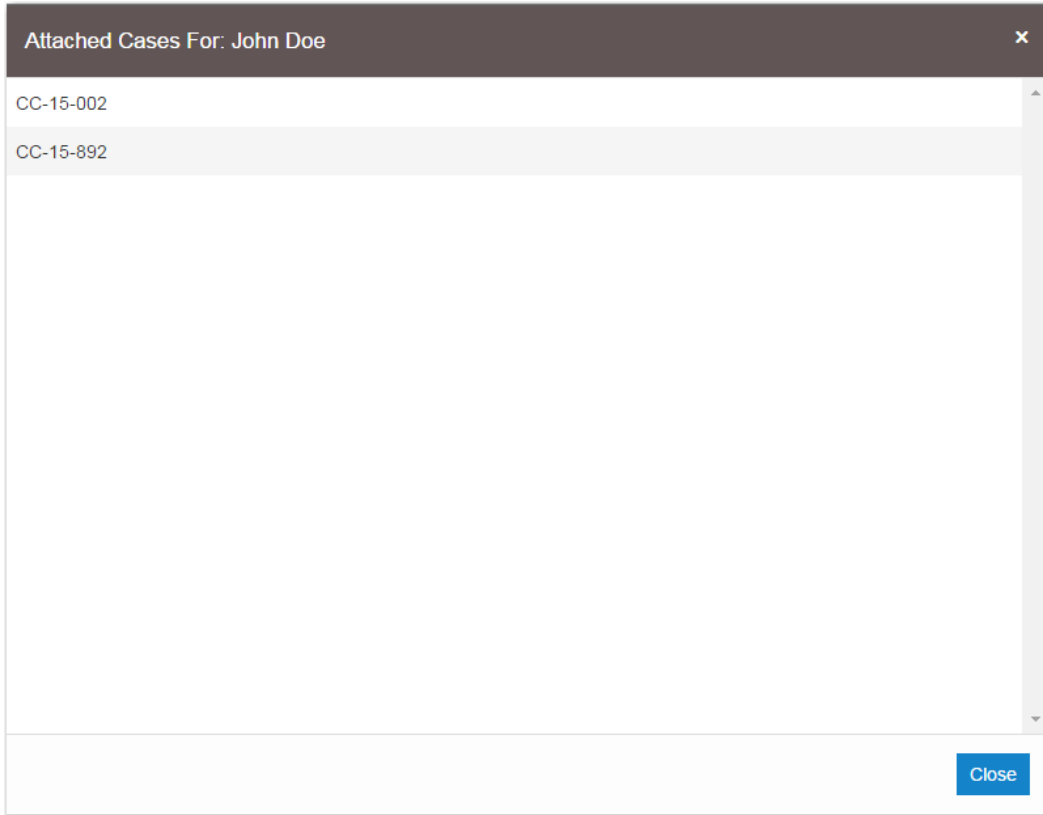


Figure 11.21 – Attached Cases For: John Doe Page

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**.

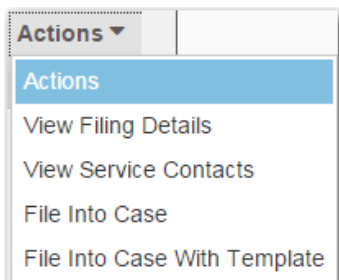


Figure 11.22 – Actions Drop-Down List

The *Service Contacts* page for the specified case opens.

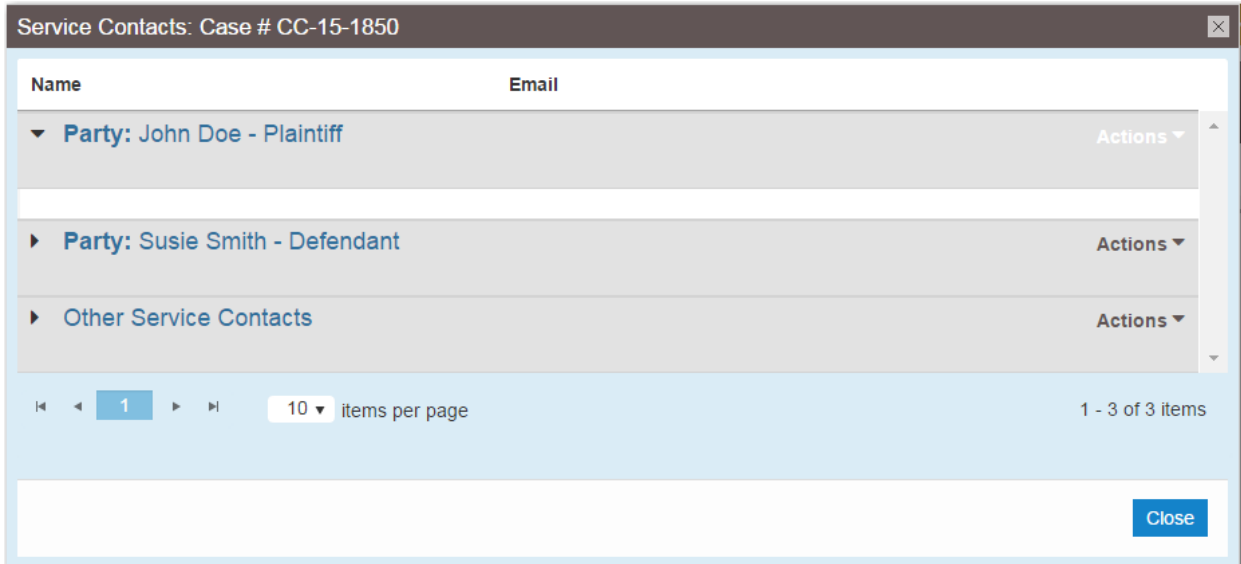


Figure 11.23 – Service Contacts: Case# CC-15-1850 Page

2. From the **Actions** drop-down list for the specified party, select **Link Parties with Contact**.

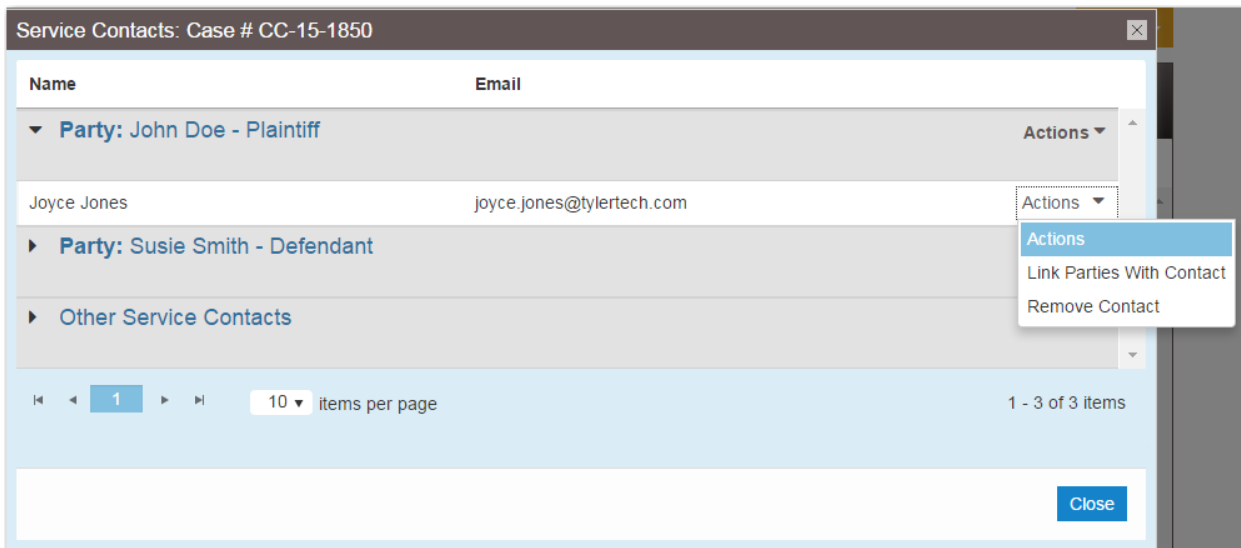


Figure 11.24 – Link Parties with Contact Drop-Down List on the Service Contacts: Case# CC-15-1850 Page

The *Link Parties* dialog box opens. You can link or unlink service contacts to parties on the case by selecting or clearing the check box associated with the party.

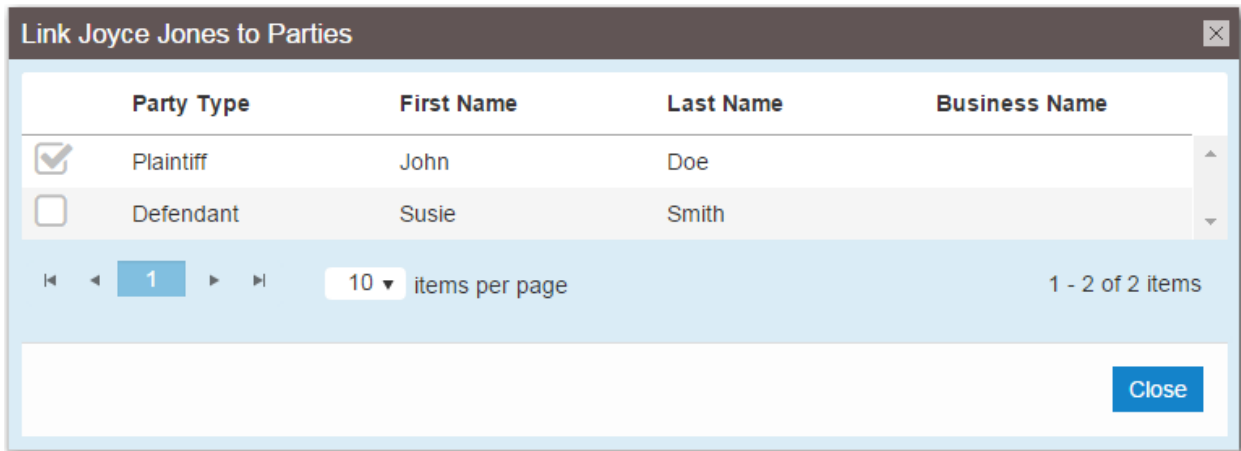


Figure 11.25 – Link Parties Dialog Box

3. Click  to return to the *Service Contacts* page for the specified case.

SEARCH AND PAGING CAPABILITY FOR SERVICE CONTACTS

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.

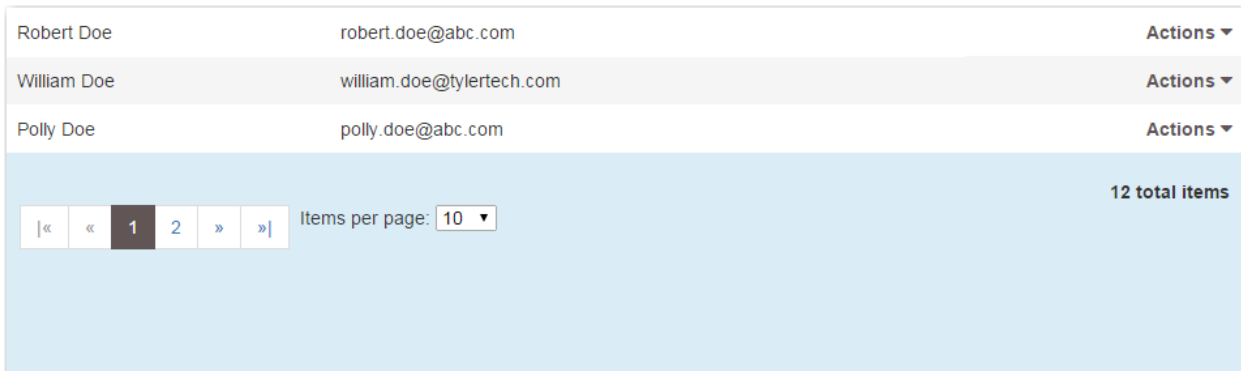


Figure 11.26 – Service Contacts Page with Paging Feature

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 *Service Contacts* search page.

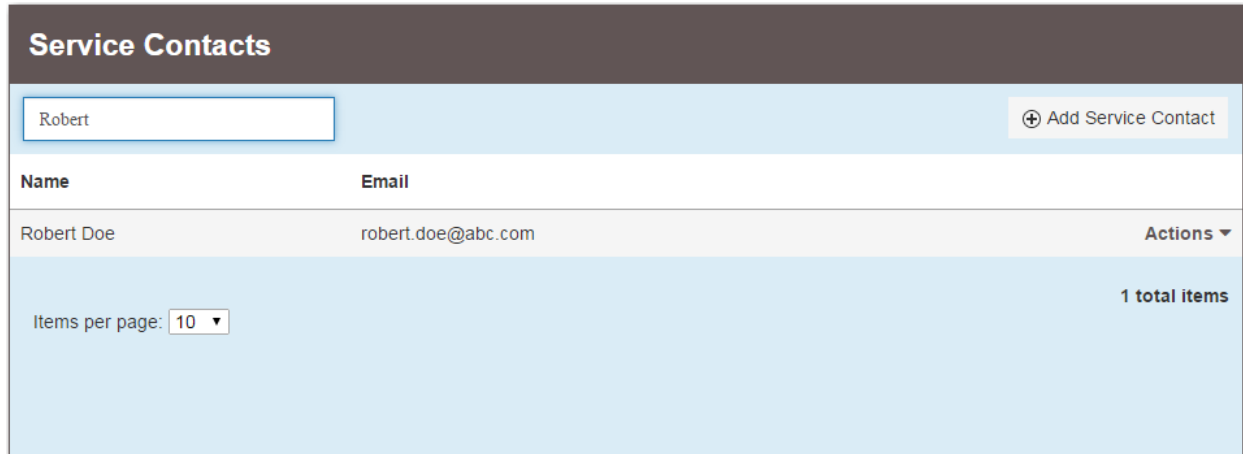


Figure 11.27 – Service Contacts Search Page

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.

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 opens.

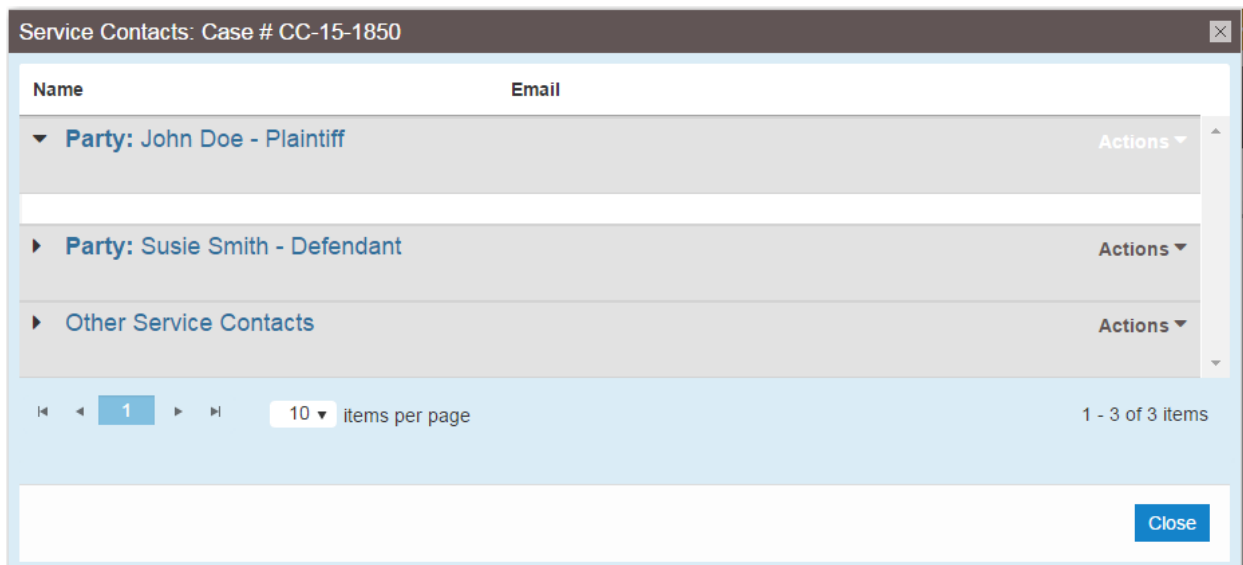


Figure 11.28 – Service Contacts: Case# CC-15-1850 Page

2. Locate the service contact that you want to remove. From the **Actions** drop-down list for the specified contact, select **Remove Contact**.

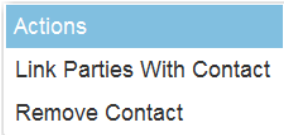


Figure 11.29 – Service Contacts Actions Drop-Down List

The contact is removed from the case.

Note: A notification is sent to service contacts that are being removed from a case.

DEACTIVATING A SERVICE CONTACT

You can deactivate a service contact from the *Service Contacts* page.

Perform the following steps to deactivate a service contact from the *Service Contacts* page:

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

The *Service Contacts* page opens.

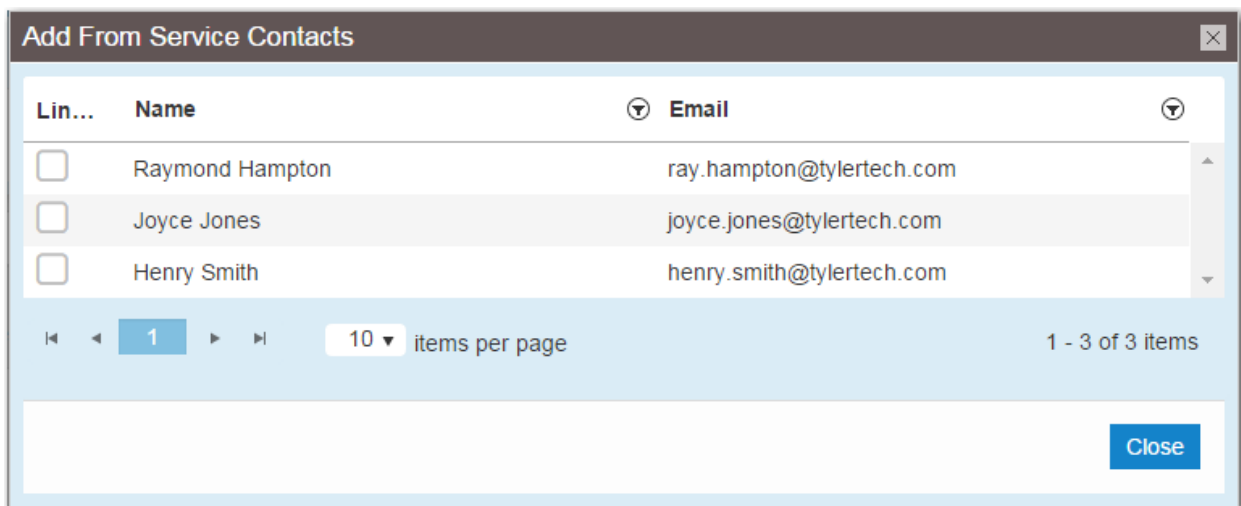


Figure 11.30 – Service Contacts Page

2. Locate the name of the service contact that you want to deactivate. From the **Actions** drop-down list for the specified contact, select **Deactivate Contact**.

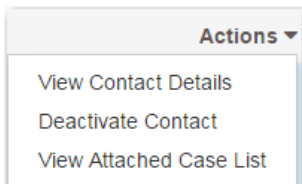


Figure 11.31 – Service Contacts Actions Drop-Down List

The contact is removed from the list and from any filings to which the contact was attached.

CHAPTER 12 FILINGS

TOPICS COVERED IN THIS CHAPTER

- ◆ FILTERING THE FILINGS QUEUE
- ◆ VIEWING THE ENVELOPE DETAILS
- ◆ RESUMING THE FILING PROCESS
- ◆ CANCELING A FILING

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 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.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Ref Number	
▶	Case # CC-15-1597				Actions ▼
	Draft # 42591 started Monday, October 05, 2015 at 4:45 PM CDT by Individual Filer				
▼	Case # CC-15-1681				Actions ▼
	Draft # 37044 started Thursday, September 03, 2015 at 1:13 PM CDT by Individual Filer				
▼	Envelope # 27765				Actions ▼
	Envelope # 27765 filed Monday, July 27, 2015 at 11:22 AM CDT by Individual Filer				
Submitted	Agreement	EFile			Actions ▼
▼	Envelope # 27763				Actions ▼
	Envelope # 27763 filed Monday, July 27, 2015 at 11:16 AM CDT by Individual Filer				
Submitted	Assignment	EFile			Actions ▼
▼	Case # CC-15-1597				Actions ▼
	Draft # 39 started Wednesday, April 29, 2015 at 11:12 AM CDT by Individual Filer				
Draft	Additional Conditions Of Pr...	EFileAndServe	Filing Code	CC-15-1597	Actions ▼
▼	Envelope # 38				Actions ▼
	Envelope # 38 filed Monday, July 27, 2015 at 11:03 AM CDT by Individual Filer				
1 20 items per page					1 - 7 of 7 items
Back					

Figure 12.1 – 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 or your firm 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.

All relevant information concerning your filings is displayed on the *Filing History* page.

Filing Status	Filing Code	Filing Type	Filing Description	Ref Number	
▶	Case # CC-15-1597				Actions ▼
Draft # 42591 started Monday, October 05, 2015 at 4:45 PM CDT by Individual Filer					
▼	Case # CC-15-1681				Actions ▼
Draft # 37044 started Thursday, September 03, 2015 at 1:13 PM CDT by Individual Filer					
▼	Envelope # 27765				Actions ▼
Envelope # 27765 filed Monday, July 27, 2015 at 11:22 AM CDT by Individual Filer					
Submitted	Agreement	EFile			Actions ▼
▼	Envelope # 27763				Actions ▼
Envelope # 27763 filed Monday, July 27, 2015 at 11:16 AM CDT by Individual Filer					
Submitted	Assignment	EFile			Actions ▼
▼	Case # CC-15-1597				Actions ▼
Draft # 39 started Wednesday, April 29, 2015 at 11:12 AM CDT by Individual Filer					
Draft	Additional Conditions Of Pr...	EFileAndServe	Filing Code	CC-15-1597	Actions ▼
▼	Envelope # 38				Actions ▼
Envelope # 38 filed Monday, July 27, 2015 at 11:03 AM CDT by Individual Filer					
1 - 7 of 7 items					↻
Back					

Figure 12.2 – Filing History Page

- 2. Click **Search** () to filter the search.
The *Filing History* page for filtering a search is displayed.

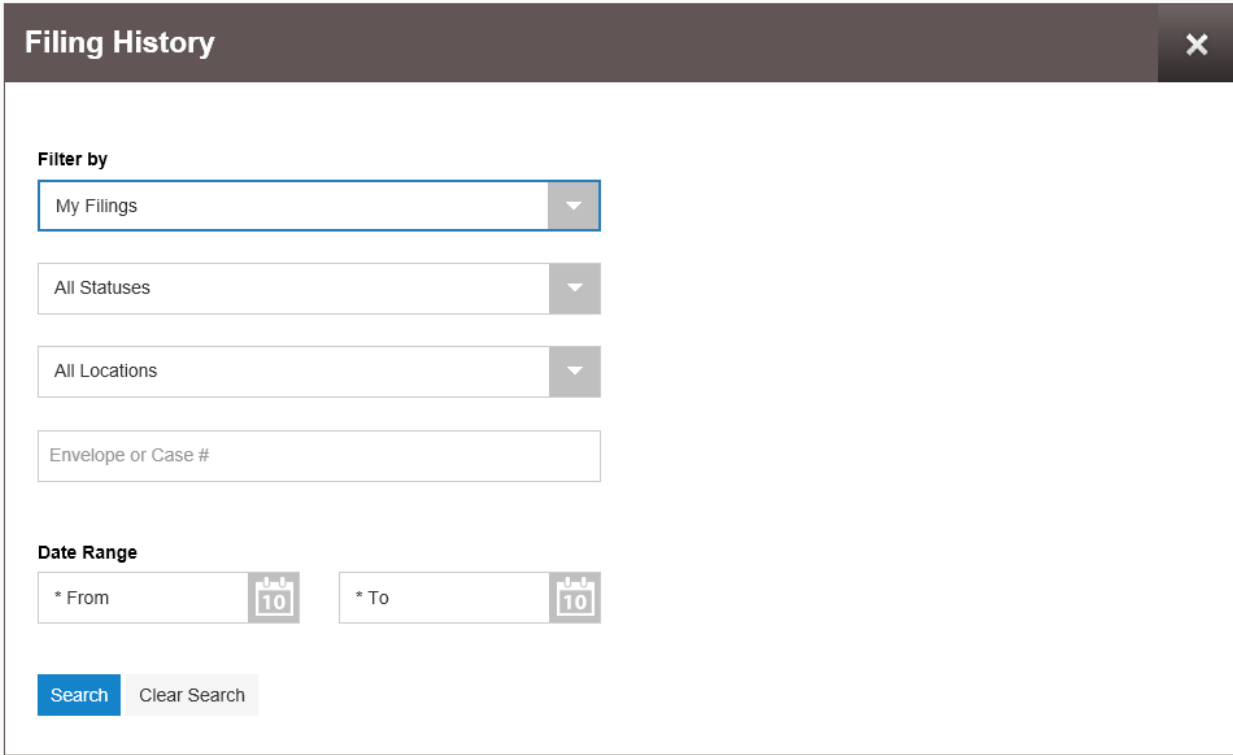


Figure 12.3 – Filing History Page for Filtering a Search

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 **My Filings** drop-down list.

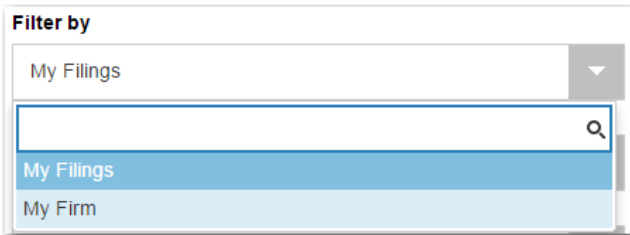


Figure 12.4 – Filter by Drop-Down List

- b. Select the status from the **All Statuses** drop-down list.

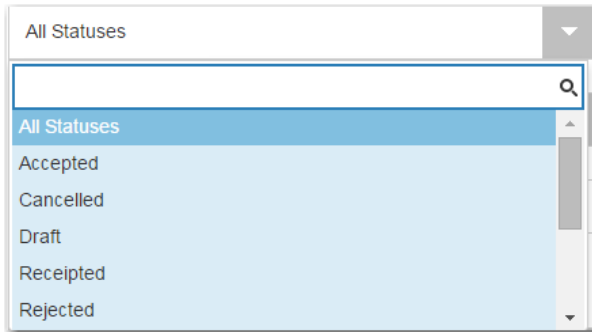



Figure 12.5 – All Statuses Drop-Down List

- 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).

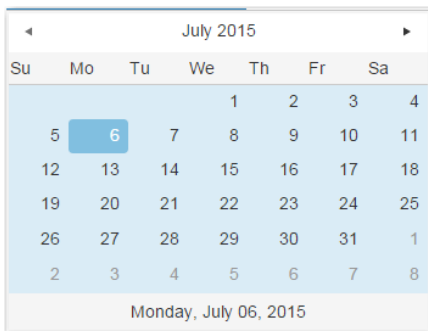


Figure 12.6 – Filter Date Calendar

4. Click 

A list of cases meeting your search criteria is displayed.

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.

Perform the following steps to view the envelope details:

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

The *Filing History* page opens.

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.

Filing History					Q
Filing Status	Filing Code	Filing Type	Filing Description	Ref Number	
▶	Case # CC-15-1597				Actions ▼
	Draft # 42591 started Monday, October 05, 2015 at 4:45 PM CDT by Individual Filer				
▼	Case # CC-15-1681				Actions ▼
	Draft # 37044 started Thursday, September 03, 2015 at 1:13 PM CDT by Individual Filer				
▼	Envelope # 27765				Actions ▼
	Envelope # 27765 filed Monday, July 27, 2015 at 11:22 AM CDT by Individual Filer				
Submitted	Agreement	EFile			Actions ▼
▼	Envelope # 27763				Actions ▼
	Envelope # 27763 filed Monday, July 27, 2015 at 11:16 AM CDT by Individual Filer				
Submitted	Assignment	EFile			Actions ▼
▼	Case # CC-15-1597				Actions ▼
	Draft # 39 started Wednesday, April 29, 2015 at 11:12 AM CDT by Individual Filer				
Draft	Additional Conditions Of Pr...	EFileAndServe	Filing Code	CC-15-1597	Actions ▼
▼	Envelope # 38				Actions ▼
	Envelope # 38 filed Monday, July 27, 2015 at 11:03 AM CDT by Individual Filer				
⏪ ◀ 1 ▶ ⏩ 20 items per page 1 - 7 of 7 items ↻					
Back					

Figure 12.7 – 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 opens.

Note: Only fields that contain values are displayed in the filing details. Fields that contain no data are not displayed.

Envelope # 38

Envelope Information

Envelope Id 38	Submitted Date 7/27/2015 11:03 AM CDT	Submitted User Name Indie.filer@yletech.com
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Case Information

Location OFS GA 2014 VC - Court at Law 2	Category Civil	Case Type Damages
Firm Name Individual	Filed By Individual Filer	

Party Information

Party Type	Party Name	Attorney
Defendant	Johnson Floors	
Plaintiff	Nicolas Johnson	

Filings

Filing Code	Reference Number	Filing Description
Assignment		

Filing Details

Filing Type EFile	Filing Code Assignment
Filing Status Submitted	

Lead Document

File Name	Description	Security	Download
AcademicCalendarSpring_test.pdf 34.04 KB			Original File

Service Contacts

Serve	Name	Email
▶	Party: Johnson Floors - Defendant	
▶	Party: Nicolas Johnson - Plaintiff	
▶	Other Service Contacts	

Fees

▼ Assignment		Description	Amount
		Filing Fee	\$0.00
		Filing Total:	\$0.00
		Total Filing Fee	\$0.00
		Envelope Total:	\$0.00
Party Responsible for Fees	Johnson Floors		
Payment Account	Waiver		
Filer Type	Default		

[View Filing History](#) [View Receipt](#)

Figure 12.8 – Envelope # 38 Page

- 4. In the **Lead Document** section, click the link in the **Download** field to obtain a copy of the lead document.

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.

Filing Status	Filing Code	Filing Type	Filing Description	Ref Number
▶	Case # CC-15-1597			Actions ▾
Draft # 42591 started Monday, October 05, 2015 at 4:45 PM CDT by Individual Filer				
▼	Case # CC-15-1681			Actions ▾
Draft # 37044 started Thursday, September 03, 2015 at 1:13 PM CDT by Individual Filer				
▼	Envelope # 27765			Actions ▾
Envelope # 27765 filed Monday, July 27, 2015 at 11:22 AM CDT by Individual Filer				
Submitted	Agreement	EFile		Actions ▾
▼	Envelope # 27763			Actions ▾
Envelope # 27763 filed Monday, July 27, 2015 at 11:16 AM CDT by Individual Filer				
Submitted	Assignment	EFile		Actions ▾
▼	Case # CC-15-1597			Actions ▾
Draft # 39 started Wednesday, April 29, 2015 at 11:12 AM CDT by Individual Filer				
Draft	Additional Conditions Of Pr...	EFileAndServe	Filing Code	CC-15-1597 Actions ▾
▼	Envelope # 38			Actions ▾
Envelope # 38 filed Monday, July 27, 2015 at 11:03 AM CDT by Individual Filer				

◀ ◁ 1 ▷ ▶ 20 items per page 1 - 7 of 7 items ↻

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Figure 12.9 – Filing History Page

Perform the following steps to resume the filing process on the case:

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 opens 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.

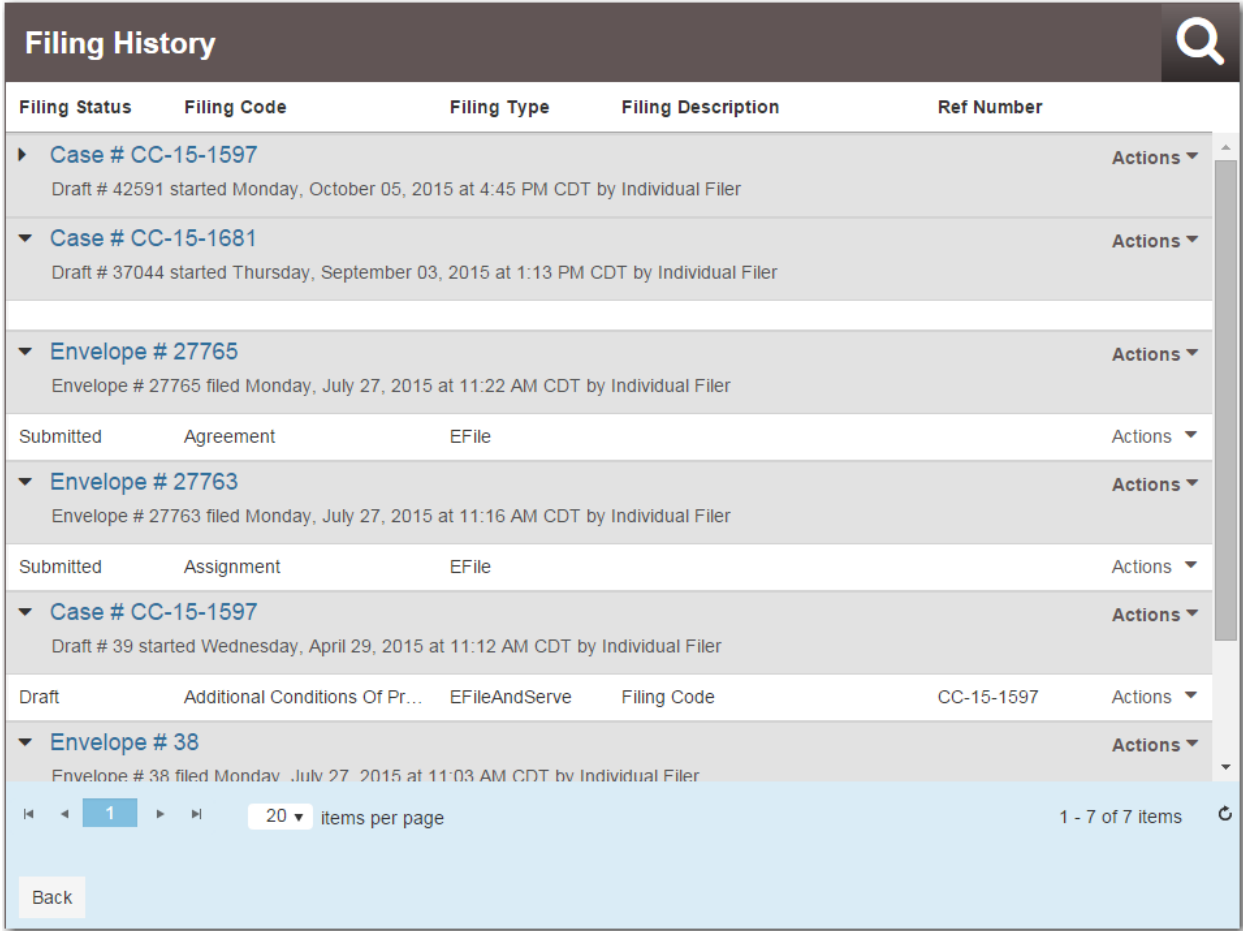


Figure 12.10 – Filing History Page

Perform the following steps to cancel the filing:

1. On the *Filing History* page, select the filing that you want to cancel.
2. From the case or envelope **Actions** drop-down list, select **Cancel**.

Q

Filing History

Filing Status	Filing Code	Filing Type	Filing Description	Ref Number	Actions
▶	Case # CC-15-1597		Draft # 42591 started Monday, October 05, 2015 at 4:45 PM CDT by Individual Filer		Actions ▼
▼	Case # CC-15-1681		Draft # 37044 started Thursday, September 03, 2015 at 1:13 PM CDT by Individual Filer		Actions ▼
▼	Envelope # 27765		Envelope # 27765 filed Monday, July 27, 2015 at 11:22 AM CDT by Individual Filer		Actions ▼
Submitted	Agreement	EFile			Actions ▼
▼	Envelope # 27763		Envelope # 27763 filed Monday, July 27, 2015 at 11:16 AM CDT by Individual Filer		Actions ▼
Submitted	Assignment	EFile			Actions ▼
▼	Case # CC-15-1597		Draft # 39 started Wednesday, April 29, 2015 at 11:12 AM CDT by Individual Filer		<div style="border: 1px solid #ccc; padding: 2px;"> Actions Cancel </div>
Draft	Additional Conditions Of Pr...	EFileAndServe	Filing Code	CC-15-1597	Actions ▼
▼	Envelope # 38		Envelope # 38 filed Monday, July 27, 2015 at 11:03 AM CDT by Individual Filer		Actions ▼

⏪ ◀ 1 ▶ ⏩
20 items per page
1 - 7 of 7 items

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Figure 12.11 – Filing History Page – Canceling a Filing

Note: Ensure that you want to cancel the filing before you select Cancel. Once you perform the cancellation action, the filing is canceled immediately, and you cannot undo the action.

CHAPTER 13 REPORTS

TOPICS COVERED IN THIS CHAPTER

- ◆ CREATING A FINANCIAL RECONCILIATION REPORT
- ◆ CREATING A FILINGS REPORT

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 opens.

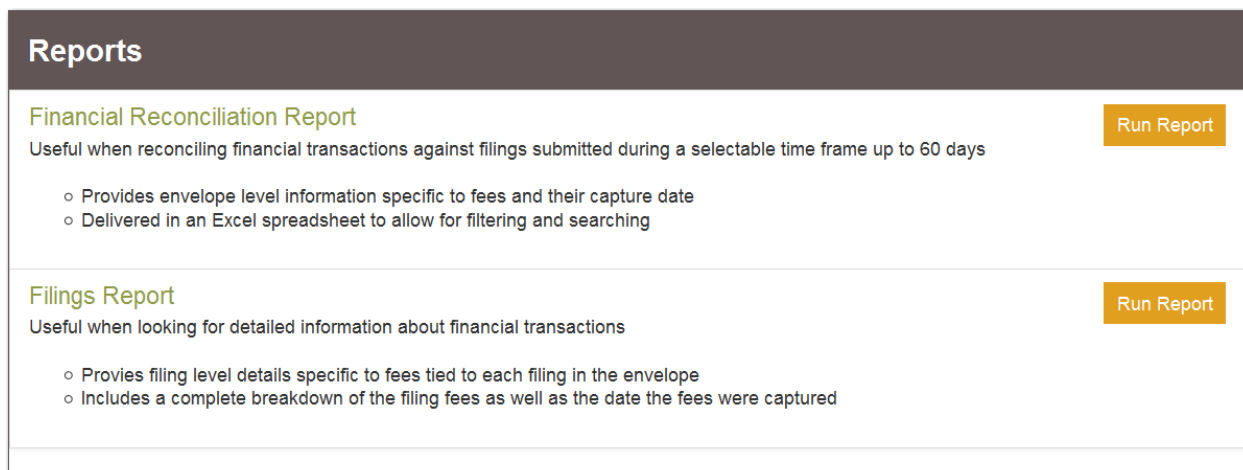


Figure 13.1 – Reports Page

2. In the **Financial Reconciliation Report** panel, click  .

Reports



Financial Reconciliation Report

Useful when reconciling financial transactions against filings submitted during a selectable time frame up to 60 days

- Provides envelope level information specific to fees and their capture date
- Delivered in an Excel spreadsheet to allow for filtering and searching

Report Parameters

Filings Submitted By

From  **To** 

Locations

Status

Filings Report


Useful when looking for detailed information about financial transactions

- Provides filing level details specific to fees tied to each filing in the envelope
- Includes a complete breakdown of the filing fees as well as the date the fees were captured

Figure 13.2 – 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 **Me**.

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).

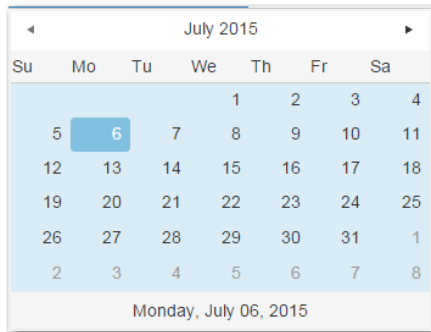


Figure 13.3 – Filter Date Calendar

- 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 drop-down list.

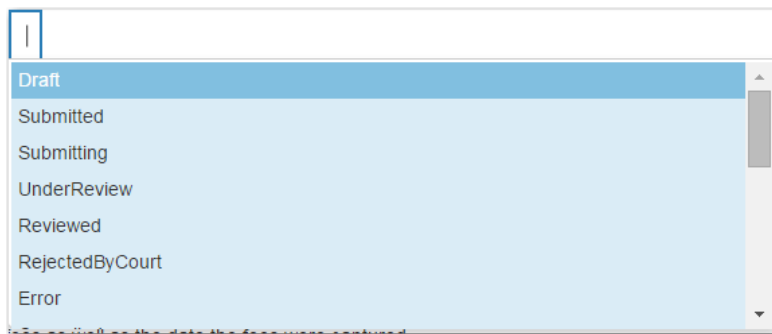


Figure 13.4 – Status Field Drop-Down List

4. Click **Download Report** to run the report, or click **Cancel** 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 that 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 opens.

The screenshot shows a 'Reports' section with two report options. The first is the 'Financial Reconciliation Report', which is useful for reconciling financial transactions against filings submitted during a selectable time frame up to 60 days. It provides envelope level information specific to fees and their capture date and is delivered in an Excel spreadsheet. The second is the 'Filings Report', which is useful for looking for detailed information about financial transactions. It provides filing level details specific to fees tied to each filing in the envelope and includes a complete breakdown of the filing fees as well as the date the fees were captured. Each report option has a 'Run Report' button.

Report Name	Description	Action
Financial Reconciliation Report	Useful when reconciling financial transactions against filings submitted during a selectable time frame up to 60 days <ul style="list-style-type: none">Provides envelope level information specific to fees and their capture dateDelivered in an Excel spreadsheet to allow for filtering and searching	Run Report
Filings Report	Useful when looking for detailed information about financial transactions <ul style="list-style-type: none">Provides filing level details specific to fees tied to each filing in the envelopeIncludes a complete breakdown of the filing fees as well as the date the fees were captured	Run Report

Figure 13.5 – Reports Page

2. In the **Filings Report** panel, click  .

Reports

Financial Reconciliation Report

Useful when reconciling financial transactions against filings submitted during a selectable time frame up to 60 days

- Provides envelope level information specific to fees and their capture date
- Delivered in an Excel spreadsheet to allow for filtering and searching

Run Report

Filings Report

Useful when looking for detailed information about financial transactions

- Provides filing level details specific to fees tied to each filing in the envelope
- Includes a complete breakdown of the filing fees as well as the date the fees were captured

Report Parameters

Filings Submitted By

From

Locations

Status

Me

06/25/2015

10

To

07/02/2015

10

All

All

Click to select specific statuses


Reset

Select

Cancel

Download Report

Figure 13.6 – 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 **Me**.
 - 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).

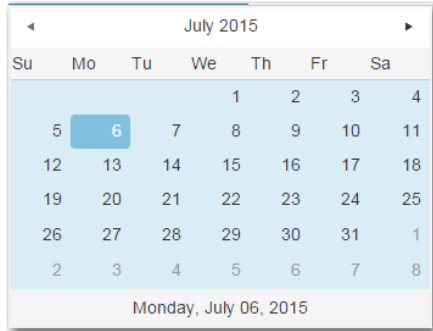


Figure 13.7 – Filter Date Calendar

- 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 drop-down list.

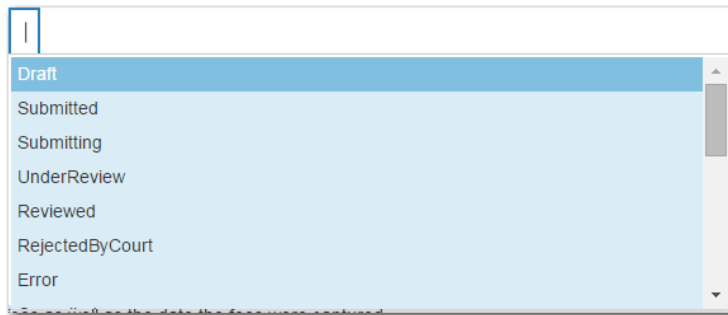


Figure 13.8 – Status Field Drop-Down List

4. Click **Download Report** to run the report, or click **Cancel** to cancel the action.
5. Open the report in Microsoft Excel, or save the report to another location.