Odyssey® File & Serve Quick Reference Guide

Topics Covered in this Document

Registering as a User with an Existing Firm

You can register as a user if your Firm Administrator has already registered with File & Serve and approved users to self-register.

Note: You must know your firm's name in order to set up your account. The Firm Administrator may not allow users to self register. If this is the case, the firm's name is not available when searching, and you must contact the Firm Administrator to be registered.

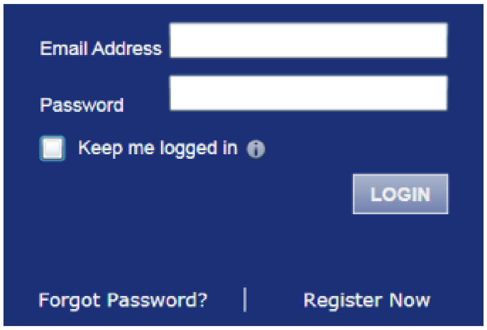

Figure 1.1 – Login Window

Perform the following steps to register as a user in the firm:

1. Click the Register Now link on the login screen.

   The **File and Serve Registration Wizard** opens.
   Note: There is no fee to sign up for File & Serve.

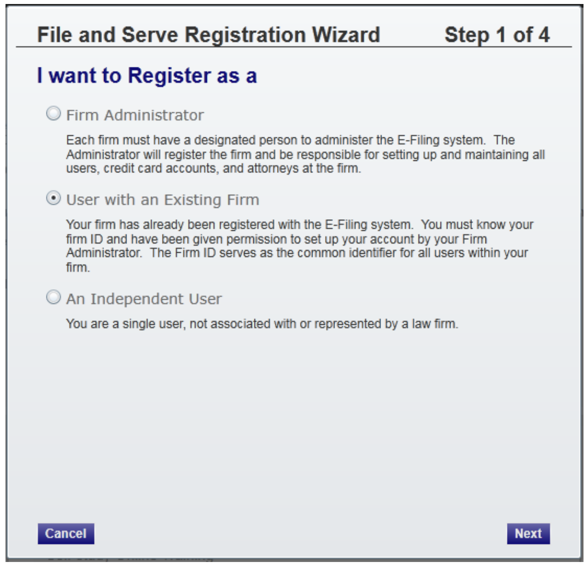

Figure 1.2 – File and Serve Registration Wizard (Step 1 of 4)

Note: Registration options vary by site.

2. Select the User with an Existing Firm option.
3. Click the Next button to select your firm, or click the Cancel button to cancel the registration process.

Figure 1.3 – File and Serve Registration Wizard (Step 2 of 4)

4. Type your **Firm Name**, or click the Search button to view a list of all available firms.
5. Select your firm's name from the list.

6. Click the Next button to enter your account information; click the Previous button to return to the previous screen; or click the Cancel button to cancel the registration process.

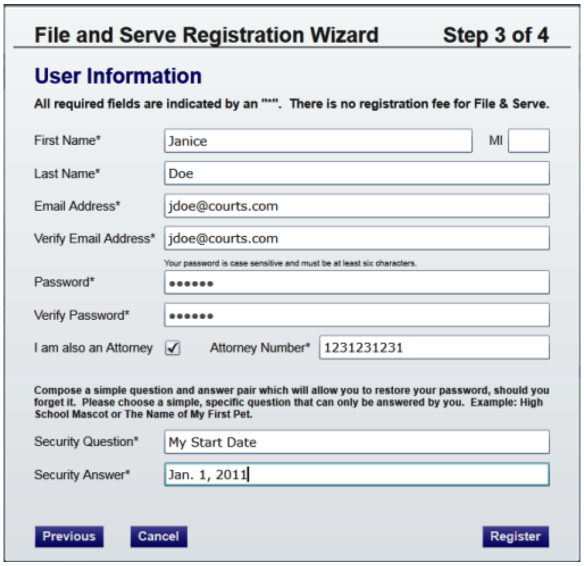

Figure 1.4 – File and Serve Registration Wizard (Step 3 of 4)

Note: An asterisk (*) indicates required information.

7. Complete the **User Information** form.
8. Enter a simple **Security Question** in the field provided. (Example: `What was your high school mascot?`)

Figure 1.5 – Security Question Field

9. Enter a **Security Answer** in the field provided.

Figure 1.6 – Security Answer Field

Note: Select I am also an Attorney ☑ if you are an attorney, and then enter your attorney number in the field. Attorney number formats vary by site; refer to your court's website for information on how to enter your attorney number.

Figure 1.7 – Attorney Number Field

Note: Click the Verify button if prompted. This verifies your attorney number is in the system.

10. Click the Register button. File & Serve displays the **Your Registration is Complete.** message on the screen.

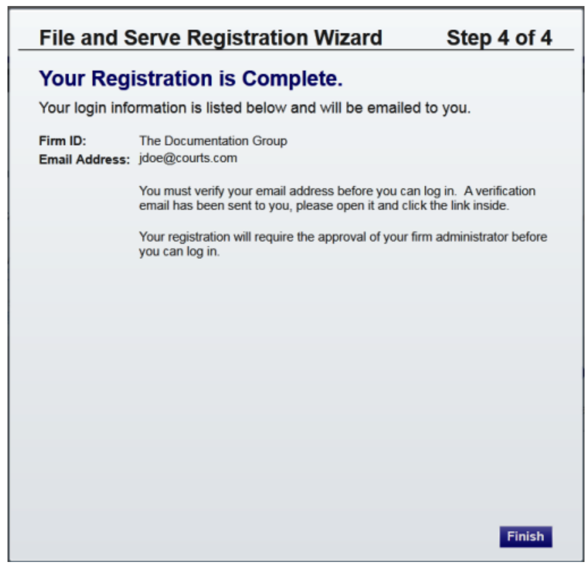

Figure 1.8 – File and Serve Registration Wizard (Step 4 of 4)

11. Record the login details displayed for your records.
12. Click the Finish button.
13. Go to your e-mail inbox to access your registration confirmation e-mail.

Note: You must verify your e-mail address to complete the registration process. A verification e-mail (from no-reply@tylerhost.net) will be sent to you. Open the e-mail and click the link to confirm your e-mail address. If you don't see the e-mail in your inbox, check your junk mail folder for the e-mail.

Your registration is now complete. Once you have received your e-mail confirmation, return to the login screen to log in to File & Serve.

Logging into File & Serve

You can log in by using your e-mail address and password provided during the registration process. You must log in to be able to use File & Serve.

Note: Click Register Now to register if you have not registered to use File & Serve.

Perform the following steps to log in to e-file and serve a case:

1. Go to your File & Serve home page.
2. Enter your e-mail address and password (case-sensitive) in the fields provided.

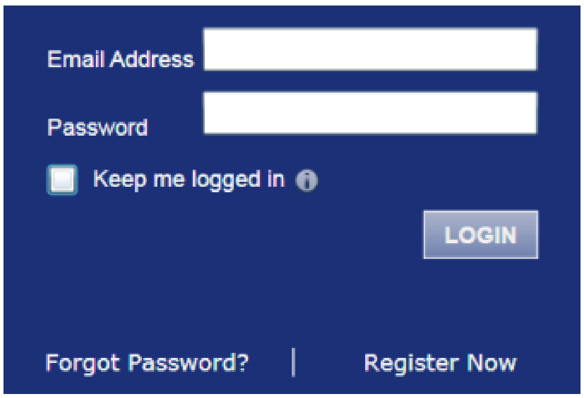

Figure 1.9 – File & Serve Login Area

3. Select the Keep me logged in check box to stay logged in to File & Serve. This keeps you logged in to File & Serve until you click the logout link to logout.
4. Click the LOGIN button.

   Note: After several failed attempts to log in to the system, your account is locked. You can unlock your account by using the Forgot Password? option and reset your password without having to contact the Firm Administrator if a security question is associated with the account.

   Once you have successfully logged in, you can begin to use File & Serve.

Searching by Case Number

You can search for a case by entering the exact case number assigned by your court in the **Case Number** field at the top-right corner of your screen. No wildcards can be used in the **Case Number** field.

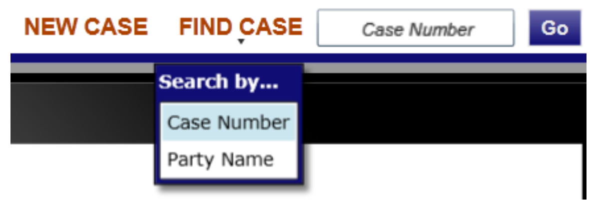

Figure 1.10 – Searching by Case Number Option

Perform the following steps to search for an existing case:

1. Click the FIND CASE link at the top of the page.
2. Click the drop-down arrow to view the search options.
3. Select the **Case Number** option.

   File & Serve displays the word **Case Number** in the case search field.
4. Type the exact case number assigned by your court in the Case Number field. No wildcards can be used in the **Case Number** field.
5. Click the Go button.

   The result screen displays the case meeting the criteria entered in the **Case Number** field.

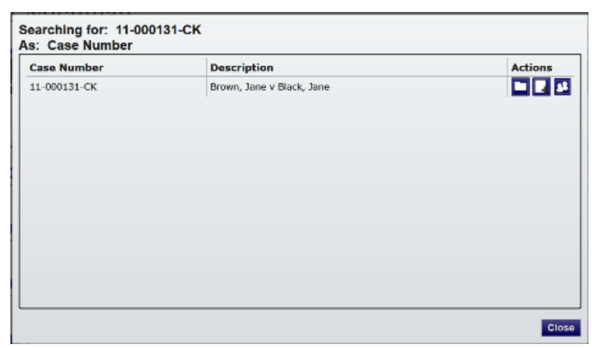

Figure 1.11 – Case Search Results

6. Select an icon under the **Actions** column and perform actions as necessary.
7. Click the Close button when you are done.

Filing into an Existing Case

You can file into an existing case once the case is initiated in File & Serve.

The procedures that follow describe the three different ways to access a case to file into the case.

Perform the following steps to access your case to begin a subsequent filing:

1. Click the WORKSPACE link at the top of the page.

   Note: This will take you to the Filings screen.

   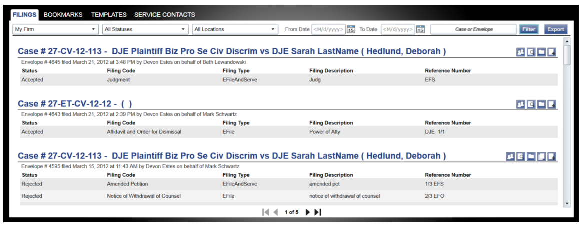

   Figure 1.12 – Filings Screen

2. Locate your case on the **Filings** screen.
3. Click the icon to file into the case. This takes you to the **Enter Filing Details** screen.

   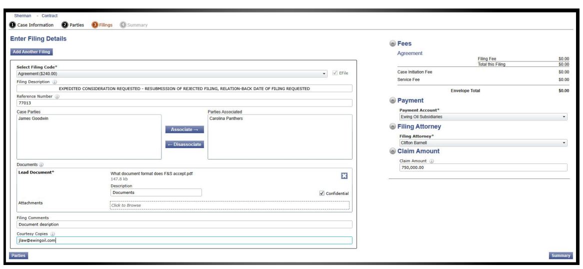

   Figure 1.13 – Entering Filing Details Screen

4. Select the filing code using the **Select Filing Code** drop-down menu.
5. Select the **EFfile** or **Service** check box to indicate your filing type.

   Note: Select both the EFile and the Service check boxes to e-file and serve the case.

6. Enter a brief description of the filing associated with the filing code previously selected in the **Filing Description** field.
7. Type a reference number of your choice that you can refer back to for this filing in the **Reference Number** field.
8. Select a name listed under **Case Parties** to associate the party selected to this filing.

   a. Select a party in the **Case Parties** field.

   b. Click the **Associate** button to add a party to the filing.

      File & Serve adds the party selected and displays the party in the **Parties Associated** field.

9. Select the **Parties Associated** with the filing you want to remove from this filing.

   a. Select a name listed under the **Parties Associated** field.

   b. Click the **Disassociate** button to remove an party from this filing. The party selected appears in the **Case Parties** box.

      File & Serve removes the party selected from the **Parties Associated** field.

10. Select the **Lead Document** for this filing.

    a. Click the **Click to Browse** link to select a **Lead Document**.

       This opens Windows Explorer on your computer.

    b. Select a document to upload from the files on your computer.

    c. Click Open to attach the file.

    d. Wait as the attachment uploads.

    e. Type a description of the uploaded attachment.

    f. To delete the uploaded attachment, click located under **Confidential**.

11. Select the **Attachments** to upload for this filing.

    a. Click the **Click to Browse** link to select an attachment.

       This action opens Windows Explorer on your computer.

    b. Select the attachment to upload from the files on your computer.

    c. Click Open to attach the file.

    d. Wait as the attachment uploads.

    e. Type a description of the uploaded attachment.

f. To delete the uploaded attachment, click located under **Confidential**.

12. Enter the **Filing Comments** for the court reviewer to read.

13. Type the e-mail addresses, separated by commas, for parties to receive **Courtesy Copies** of the filing.

14. Click the Add Another Filing button to add more filings to this envelope.

15. Review the filing **Fees** located on the right side of the screen.

Note: File & Serve authorizes your credit card; however, the transaction fees will not post to the credit card account until the court accepts the filing. Once the filing is accepted, File & Serve displays the total filing fee to be submitted for the filing.

16. Select a payment account to use to pay the filing fees.

17. Select a filing attorney.

18. Type the claim/state amount value.

19. Click the Summary button to save the **Filing Details**, or click the Parties button to return to the previous screen.

20. Click the Submit button when you are done.

File a New Case

File a new case using the **Case Information** screen.

A payment account and a filing attorney must be set up prior to filing a new case. Contact your Firm Administrator to set up the accounts prior to starting the filing process.

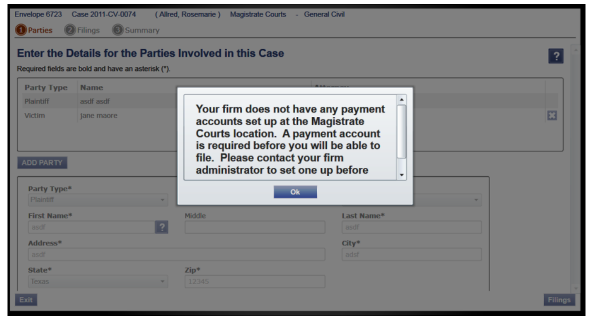

Figure 1.14 – Payment Account Required Notification

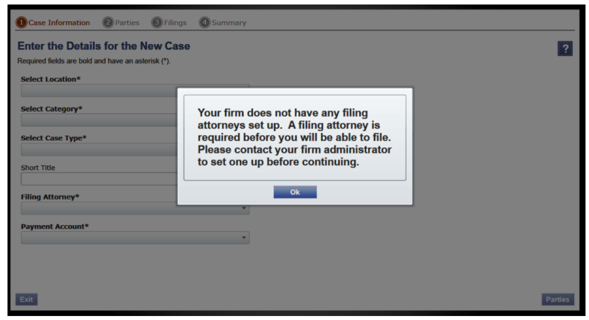

Figure 1.15 – Filing Attorney Required Notification

Enter Case Information

Perform the following steps enter the case information:

1. Click the NEW CASE link.

Figure 1.16 – New Case Link

The **Case Information** page opens.

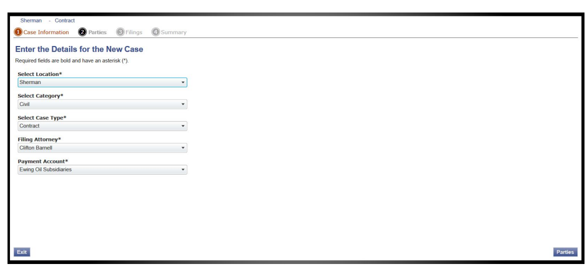

Figure 1.17 – Case Information Page

2. Complete the details for the new case form using the drop-down list.

Click here, page for a description of the fields.
Note: An asterisk indicates required fields.

3. Click the **Parties** button to save the case information and continue.

Note: Once you click the Parties button, File & Serve automatically saves a draft of those pages where all required fields have been completed. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing a saved draft, click the WORKSPACE link at the top of the page, find your case on the Filings screen, and click the icon.

Entering Party Details

Each case requires a party type. File & Serve requires that you complete all required information for the party types in the fields provided.

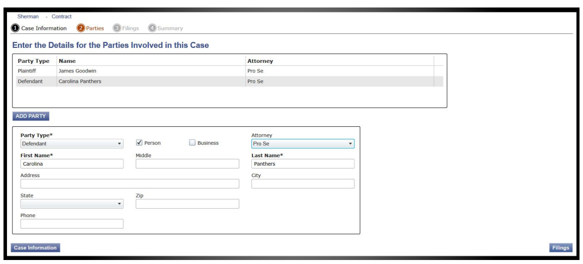

Figure 1.18 – Party Details Screen

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

1. Click the **Parties** button from the **Case Information** screen to enter the party details for the case.
2. Choose the party type by clicking on either **Plaintiff** or **Defendant** under the **Party Type** column. You can also select the party type using the drop-down menu in the **Party Type** field.
3. Enter the party information in the fields provided.

   Click here, page for a description of the fields.

   Note: Required field names are bold and followed by an asterisk.

   If you want to add another party to the filing, click the **ADD PARTY** button, and enter the party information in the required fields.

4. Click the **Filings** button to save the party details, or click the **Case Information** button to return to the previous screen.

Entering Filing Details

The **Filing Details** screen allows you to enter the filing details and calculate the fees associated with the filing.

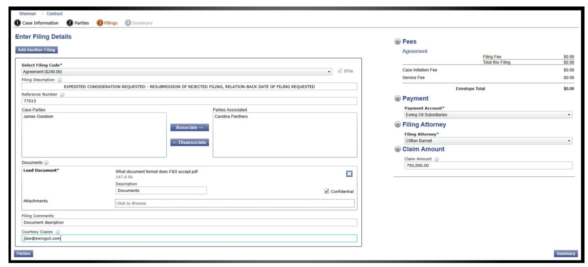

Figure 1.19 – Entering Filing Details Screen

Perform the following steps to enter the filing details for the case:

Click here, page for a description of the fields.

1. Click the **Filings** button from the **Parties** screen to enter the filing details.
2. Select the filing code using the **Select Filing Code** drop-down menu.
3. Enter a brief description of the filing associated with the filing code previously selected in the **Filing Description** field.
4. Type a reference number of your choice that you can refer back to for this filing in the **Reference Number** field.
5. Select a name listed under **Case Parties** to associate the party selected to this filing.

   a. Select a party in the **Case Parties** field.

   b. Click the **Associate** button to add a party to the filing.

   File & Serve adds the party selected and displays the party in the **Parties Associated** field.

6. Select the **Lead Document** for this filing.

   a. Click the **Click to Browse** link to select a **Lead Document**.

This opens Windows Explorer on your computer.

b. Select a document to upload from the files on your computer.

Note: Only one document can be uploaded as a lead document.

c. Click Open to attach the file.

d. Wait as the attachment uploads.

e. Type a description of the uploaded attachment.

f. To delete the uploaded attachment, click the icon.

7. Select the **Attachments** to upload for this filing.

a. Click the **Click to Browse** link to select an attachment.

This opens Windows Explorer on your computer.

b. Select the attachments to upload from the files on your computer.

Note: Multiple documents can be uploaded as attachments simultaneously.

c. Click Open to attach the file.

d. Wait as the attachment uploads.

e. Type a description of the uploaded attachment.

f. To delete the uploaded attachment, click located under **Confidential**.

8. Enter the **Filing Comments** for the court reviewer to read.

9. Click the Add Another Filing button to add more filings to this envelope.

10. Review the filing **Fees** located on the right side of the screen.

Note: File & Serve authorizes your credit card; however, the transaction fees will not post to the credit card account until the court accepts the filing. Once the filing is accepted, File & Serve displays the total filing fee to be submitted for the filing.

11. Select a payment account to use to pay the filing fees.

12. Select a filing attorney.

13. Type the claim/state amount value.

14. Click the Summary button to save the filing details when you are done, or click the Parties button to return to the previous screen.

Review Envelope and Filing Summary

The **Envelope and Filing Summary** screen displays the information you entered throughout the filing process along with the filing fees and payment information.

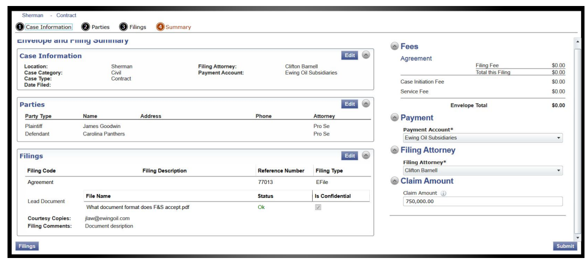

Figure 1.20 – Envelope and Filing Summary Screen

1. Carefully review the information on the screen to ensure all information entered is correct.

2. Click the Edit button to change any information on the screen, if needed.

3. Click the Submit button when you are done to submit your filing, or click the Previous button to return to the previous page.

Adding Service Contacts to a Case

You can add service contacts to a case.

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

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

1. Click the WORKSPACE link at the top of the screen.

This action opens the **Filings** window.

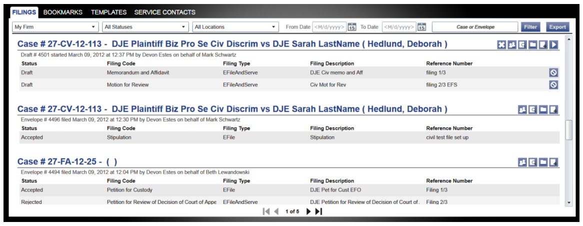

Figure 1.21 – Filings Window

2. Locate the case that you want to add service contacts.

3. Click the icon to add a service contact to the selected case.

   This opens the **Manage Case Service Contacts** window.

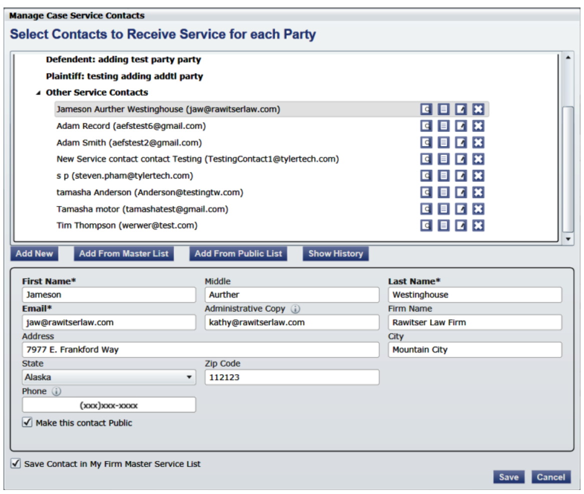

Figure 1.22 – Manage Case Service Contacts Window

4. Select the name of the service contact to add to the case, or click the Add New button in the middle of the window to add a new service contact.

   File & Serve displays the add service contact fields.

5. Complete the add service contact fields by providing the applicable information.

   Note: An asterisk (*) indicates required information.

6. Type an e-mail address in the **Administrative Copy** field.

   The administrative e-mail is an optional additional e-mail for the delivery of service. Delivery to this address is not considered a determining factor for the completion of e-service.

7. Select the **Make this contact Public** check box to make the contact public.

8. Select the **Save Contact in My Firm Master Service List** check box to save the contact to the firm's master service list.

9. Click the Save button to save the contact.

Technical Support

For assistance, contact Tyler Technologies through the following resources.

Resource	Contact Information
Odyssey File & Serve Support Hours	7 a.m. to 7 p.m. (CT), Monday through Friday
Odyssey File & Serve Support Chat	Assistance is also available online through Support Chat.
Odyssey File & Serve E-mail	efiling.support@tylertech.com
Odyssey File & Serve Telephone	800.297.5377
Go To Assist (Support)	Support may ask to assist you by sharing your screen using GoToAssist.