Odyssey File & Serve™

Review Queue User Guide – Release 3.11

Copyright and Confidentiality

Contents

tyler
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Chapter 1 Release 3.11 New Features

The following features are new for Release 3.11.

Note: Features vary based on your system configuration.

Judge Assignment Requirements

Reviewers are now required to assign a judge in certain case types.

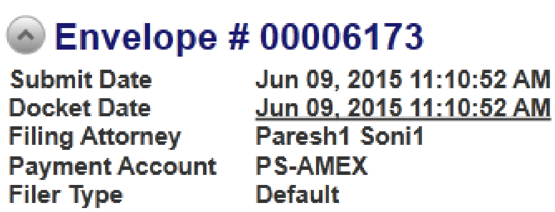

Case Information

Case Number	
Location	OFS QA 2012
Description	
Category	Civil
Type	Breach Of Contract
Claim Amount	$1,000.00
Status	Not Created
Judge	System Assigned

Figure 1 .1 – Judge Assignment

Docket Date and Time

Reviewers can now see the docket date and the time of the filing.


Envelope # 00006173

Submit Date	Jun 09, 2015 11:10:52 AM
Docket Date	Jun 09, 2015 11:10:52 AM
Filing Attorney	Paresh1 Soni1
Payment Account	PS-AMEX
Filer Type	Default

Figure 1 .2 – Docket Date and Time in the Envelope Section

Process Notes Defaults

Process notes now defaults to your organization.

Reviewers can now see the process notes on a filing for their particular organization.

Note: Process notes are written by reviewers while working a filing. These notes are used for internal communication only. Process notes are not a part of the filing; they are not transmitted to Odyssey, and they can only be seen by other reviewers in their court.

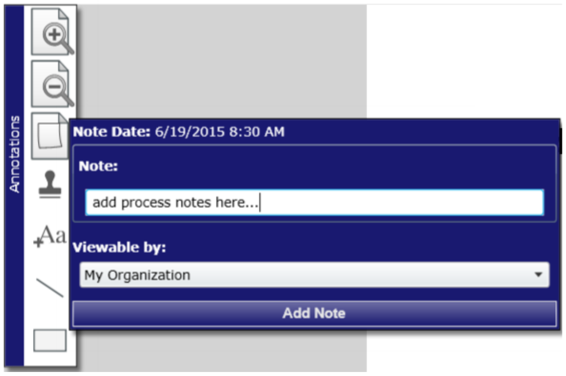


Figure 1 .3 – Process Notes

Images in the Auto-Stamp Feature

A reviewer can now add images to the auto-stamp feature. Auto-stamps are automatically applied to the document during the review process.

Note: Examples of images include the state seal, the county seal, etc.

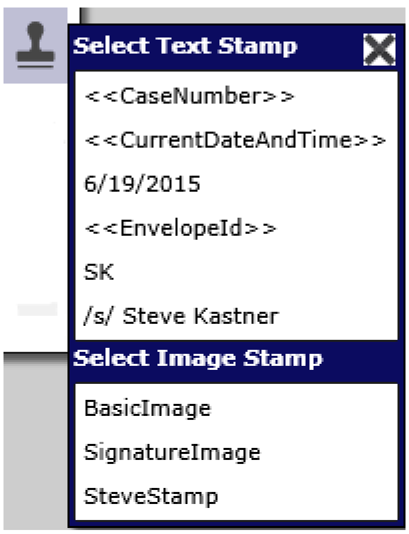


Figure 1 .4 – Auto-Stamp Feature

Reviewer Initials on the Stamp Feature

Reviewers can now add their initials to the stamp feature.

Note: The initials of the username used to log in are the initials that are displayed for the stamp.

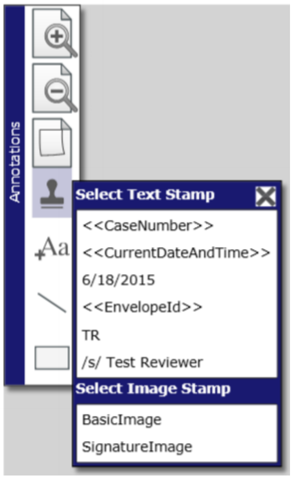


Figure 1 .5 – Annotation Stamps

Reviewer Rejection Reason Required

The system now requires the reviewer to give a reason when rejecting a filing.

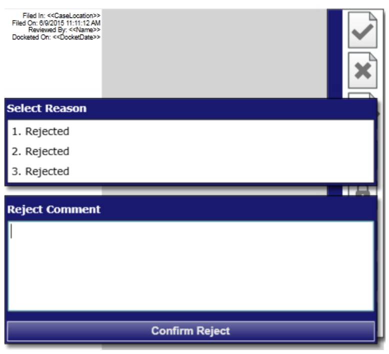


Figure 1 .6 – Rejection Dialog

Notification of a Submission Failure sent to the Filer

When a filer's submission fails, the reviewer can now send a notification to the filer that the submission failed to allow re-submission of the filing.

Note: A reviewer can reject a filing for technical reasons, e.g. the document submitted is password protected, and the reviewer is unable to open the document. The reviewer rejects the document with the request to unlock the document for viewing.

Chapter 2 Before You Begin

Topics Covered in This Chapter

♦ System Requirements
♦ Page Navigation
♦ Error Messages

Before you begin, there are several items you should be aware of to assist you with the successful operation of your software.

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

System Requirements

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

- **Browser Requirements** – The system supports current versions of the Windows operating system using Internet Explorer 7 or above or Firefox. If your browser does not meet these minimum requirements, please contact your network administrator.
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Minimum Screen Resolution** – For best results, a setting of 1024x768 or better is highly recommended. If necessary, users can set their monitors to 800x600 pixels, but doing so may compromise the graphic display.
- **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.

Navigate with Breadcrumbs

Breadcrumbs are a visual representation of the page you are currently on in the filing process. As you complete a page, the next page's title illuminates to show where you are in the process.

Note: Breadcrumb navigation requires information to be entered in a sequential order. You cannot move to the next breadcrumb until all of the required information on the current or previous page is completed.

Figure 2.1 – Breadcrumb Navigation

Populate the Data Table

The Data Title is populated using information entered or selected when completing the forms throughout the filing process.

Party Type	Name	Attorney
Plaintiff	Jamie Gillespie	
Defendant	Bob Jones	
Trustee	April Smith	
Petitioner	jackson Williams	

Figure 2.2 – Data Table

Enter User Information

The user information you enter or select populates the Data Table.

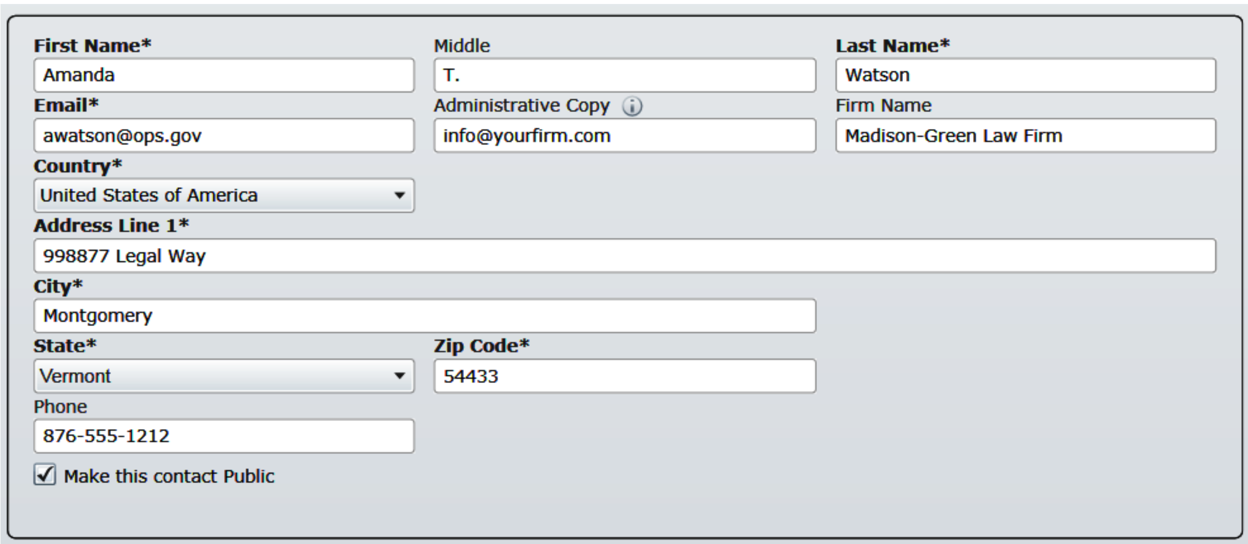


Figure 2.3 – Data Fields

Resume Filing

At any point in the filing process, the system automatically saves a draft of the page on which you have completed all required fields. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing of a saved draft, click the WORKSPACE link at the top of the page, find your case on the *FILINGS* screen, and click the icon to resume your filing.

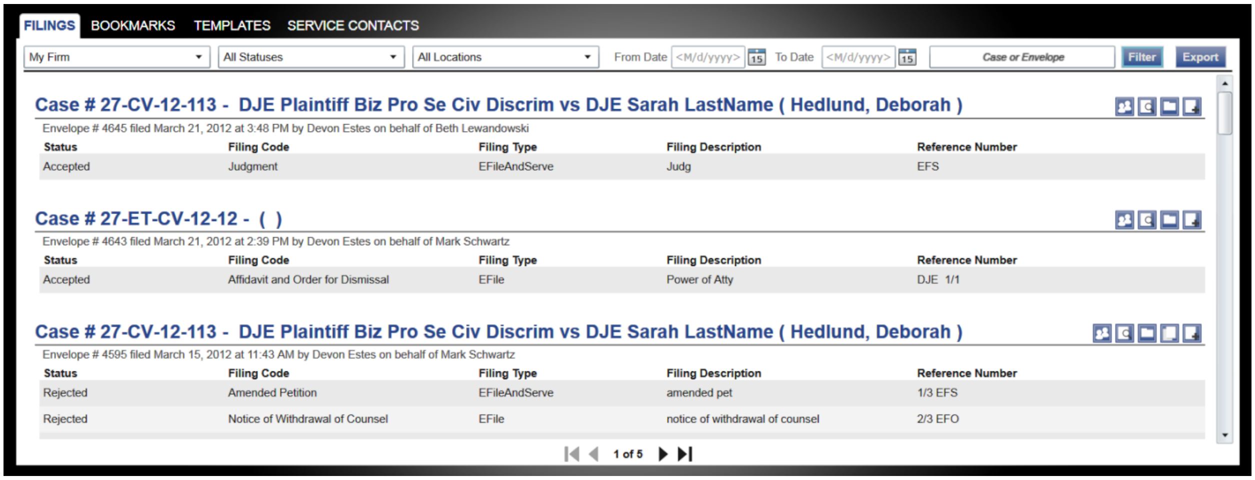


Figure 2.4 – Work Space

Error Messages

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

Password Reset Errors Scenarios

Invalid User – To reset the password for your account, you will need to provide the username for the account and answer the security question for the account.

Note: That user does not exist.

No Security question on File – No security question on file for (username). Your firm administrator may still reset your password.

Note: Reset your password.

Enter Data in Required Fields

Required fields are those that contain an asterisk (*) next to the field name. If you don't enter the information required into a required field and try to advance, you will receive error messages.

Note: Required fields may vary in different sections.

Look for a field outlined in red in your form. Place a cursor on the outline of the field, a required field message is displayed.

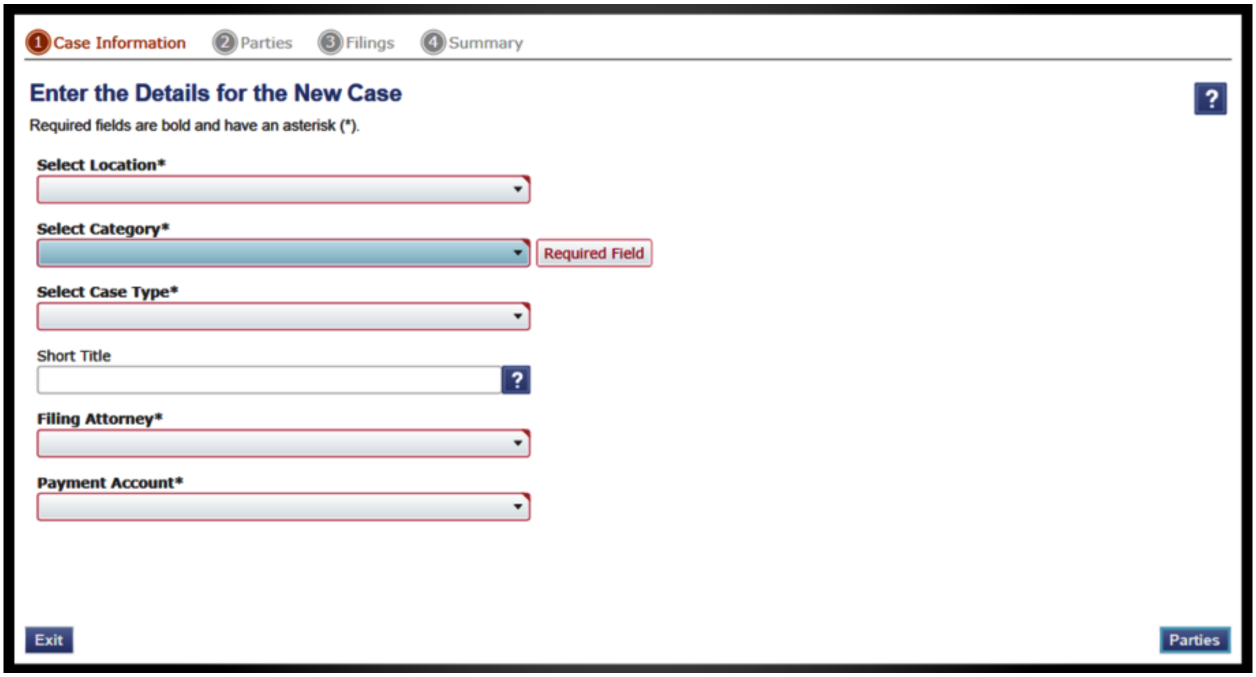


Figure 2.5 – Required Field Error Message

Receive Error Messages

When an invalid error message is displayed, this means that a required field must be populated to continue.

If the screen does not change when a navigation button is selected, look for a field outlined in red in your form. Place a cursor on the outline of the field. A required field message is displayed.

Figure 2.6 – Invalid Entry Error Message

Chapter 3 E-Filing Overview

Topics Covered in This Chapter

♦ Review Queue Overview
♦ Filing Queue Status

This section describes the e-filing process.

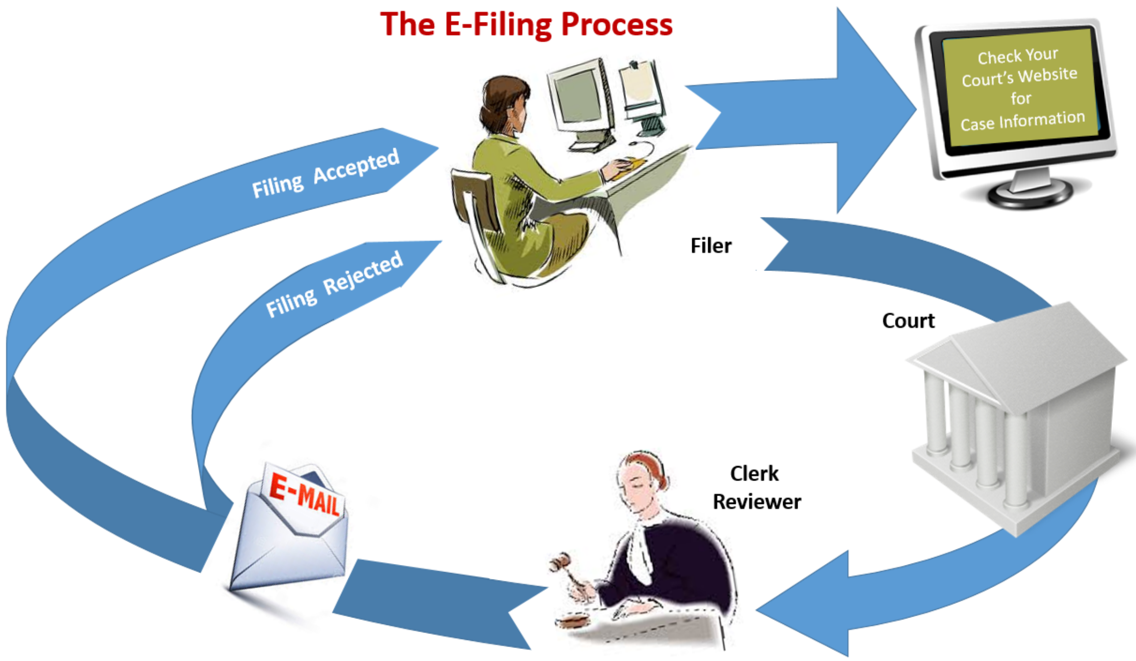


Figure 3.1 – The E-filing Process

Once a user has registered to use 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 or rejects the filing.

If the clerk accepts the filing, the case is docketed and set to appear in the clerk's case management system. An electronic mail 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 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 re-submit the filing.

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

Review Queue Overview

The purpose of this document is to instruct the user on how to use the Review Queue.

The purpose of the Review Queue is as follows:

- To allow the user to review information associated with an e-filing.

- To process electronic filings (e-filings) and accept, reject, or forward them to another reviewer if needed.
- To annotate e-filings with text, highlights, and/or lines.

Figure 3.2 – Understanding the Review Queue Data Flow

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	Filer entered full or partial filing data, but has not yet submitted filing.
Submitting	EFO, EFS, SO	Filer has submitted filing, but the document file format and payment information have not been verified on the back end.
Submitted	EFO, EFS, SO	Document file format and payment information have been verified and accepted, but the filing has not yet entered the Review Queue/Workflow Process.

Status	Filing Type	Definition
Court Processing	EFO, EFS, SO	Some additional action needs to be taken by the court.
Under Review	EFO, EFS	A clerk reviewer has selected 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.**
Accepted	EFO, EFS	Reviewer has reviewed filing and accepted.
Rejected	EFO, EFS	Reviewer has reviewed filing and rejected.
Served	SO	Service only filings completed.
Service Incomplete (Service Only filings)	SO	One or more servings failed, the service was incomplete. Example: Email or domain rejected
Cancelled	EFO, EFS, SO	Filer has cancelled the filing. Filer can only cancel draft and submitted filings.
Submission Failed	EFO, EFS	File format or billing error has occurred upon filer submitted filing. Failure specifics are available on the Details screen, and the filer is notified of specifics through email.

CHAPTER 4 FILE & SERVE HOME PAGE

The home page serves as the gateway to the system. From this screen, you can register, log in, read your court's **Message of the Day**, access the user guides, view training sessions, and get contact information for Technical Support.

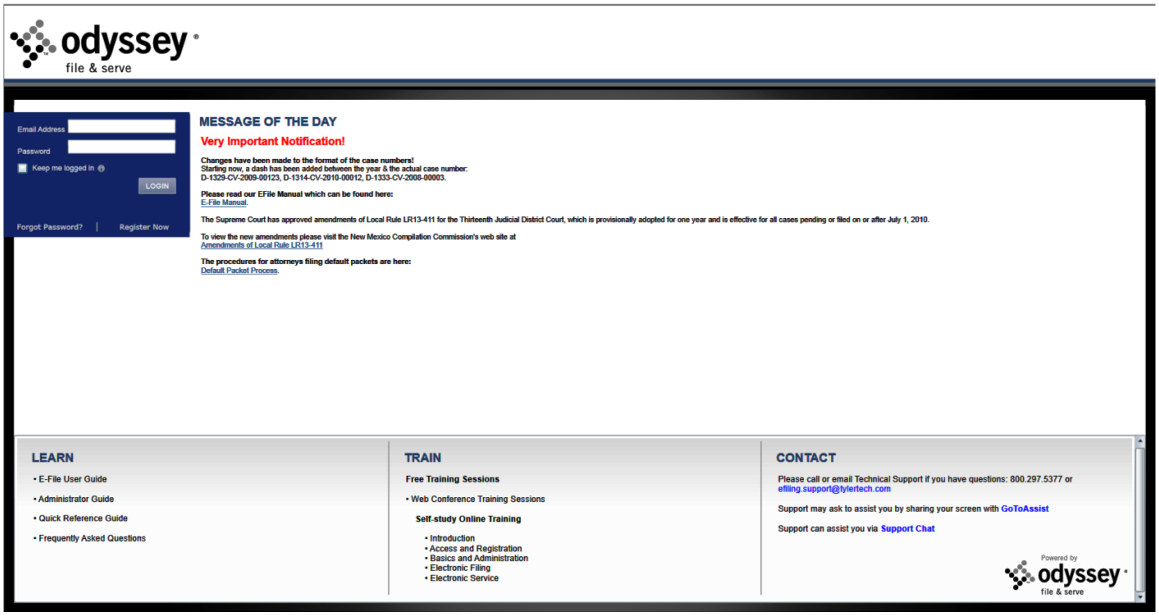


Figure 4 .1 – File & Serve Home Page

Message of the Day

The **Message of the Day** provides important messages from the court. Check this section daily for important messages from the court.

Login

The **Login** area allows the user to log in and use the system. Users can log in to by entering their e-mail address and password.

Register Now

The *Register Now* link allows is a user to register in the system using their name, contact, and payment information. The system requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

Forgot Password

The *Forgot Password* link allows a user to request their password information be re-sent to them in cases where they have forgotten their password.

Keep Me Logged In

The *Keep me logged in* checkbox allows a user to remain logged into the system for future access.

Learn

The **Learn** section has links to the user documentation. The following types of documents available to help you answer many of your day-to-day operation questions:

- The **User Guide** provides step-by-step instructions on using the system. The user guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and password.
- The **Firm Administrator Guide** is specifically for the Firm Administrator. This guide covers administrative functions such as registering the firm, managing users, payments, attorney accounts, as well as, creating and editing the firm's contact lists.
- The **Quick Reference Guide** (QRG) provides only the steps needed to complete common tasks such as logging into the system, searching for a case, initiating a new case, filing into an existing case, and reviewing the filing status.
- The **Frequently Asked Questions** (FAQ) guide lists the most frequently asked questions from the users. The FAQ covers questions pertaining to functionality.

Train

Free regularly scheduled online training is available. You can register for training online and download user manuals.

- The **Web Conference Training Sessions** are scheduled according to the needs of the courts. Locate your specific court by scrolling through the list of training sessions for your court.
- **Self-study Online Training** is available by clicking on the link and choosing the topic of your choice.

Contact

The File & Serve Technical Support Team is available to assist all users by calling 800–297–5377 Monday through Friday between the hours of 7 a.m. to 9 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an email to efiling.support@tylertech.com or by using the File & Serve Chat option.

Chapter 5 File & Serve Registration

Topics Covered in This Chapter

♦ Registering as a User with an Existing Firm
♦ Registering as an Independent User
♦ Login and Logout

Registering as a User with an Existing Firm

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

Note: You must know your firm's name 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.

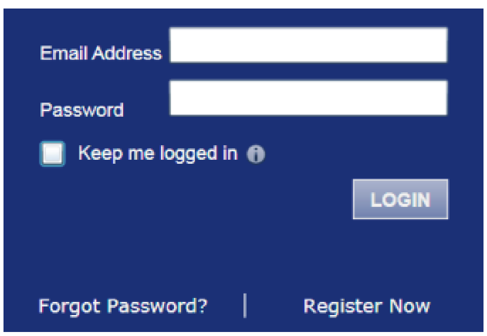


Figure 5.1 – Login Window

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

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

   The **Registration Wizard** opens.
   Note: There is no fee to sign up for the product.

   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.
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.

   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?`)

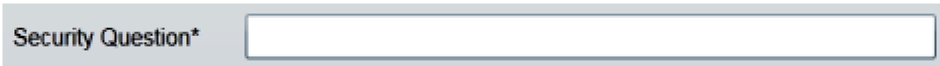


Figure 5.2 – Security Question Field

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

Figure 5.3 – 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 5.4 – Attorney Number Field

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

10. Click the **Register** button. The system displays the **Your Registration is Complete.** message on the screen.
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.

Registering as an Independent User

You can register as an "independent user" if you are a single user of the system, meaning a user not associated with any firm or being represented by any firm.

> **Note: Refer to your local court's website before registering as an independent user, as registration options may vary.**

Perform the following steps to register as an independent user:

1. Click the **Register Now** link.

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

2. Select the An Independent User option.
3. Click the **Next** button to continue; click the **Previous** button to go back; or click the **Cancel** button to cancel the registration process.
4. Read the **Usage Agreement** before proceeding.
5. Select the I Agree check box to accept and agree to the terms listed on your screen.
6. Click the **Next** button to continue; click the **Previous** button to go back; or click the **Cancel** button to cancel the registration process.
7. Complete the **Contact Information** form.
8. Click the **Next** button to continue; click the **Previous** button to go back; or click the **Cancel** button to cancel the registration process.
9. Complete the **User Information** form.
10. Enter a question in the **Security Question** field.

    Note: Your security question is required to restore your password in case you forget your password.
11. Enter a response in the **Security Answer** field.
12. Click the **Register** button.

    The message **Your Registration is Complete** displays on the screen.
13. Click the **Finish** button.

    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 complete, go to your home page to log in.

Login and Logout

All users are required to log 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 log out after they have completed their transactions.

Logging In

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 e-file or e-serve.

Note: Click Register Now to register if you have not registered before.

Perform the following steps to log in:

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

    Note: This actions takes you to the reviewer queue.

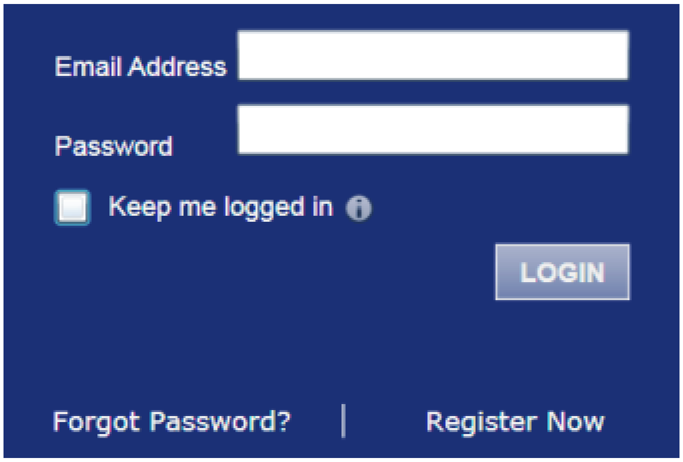


Figure 5.5 – Login Area

3. Select the Keep me logged in check box to stay logged in. This keeps you logged in 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, the system defaults to the Review Queue.

Logging Out

This section describes how to properly log out.

Perform the following steps to log out:

1. Click the LOGOUT link at the top right corner of the page to automatically log out.

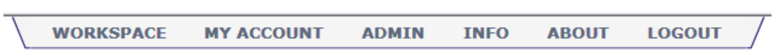


Figure 5.6 – Logout Link

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

Resetting your Password

If you have forgotten your password, you can reset your password by entering the e-mail address provided during registration and clicking the Forgot Password? link.

Note: Your password is case-sensitive. Make sure your caps lock is not on.

Note: 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.

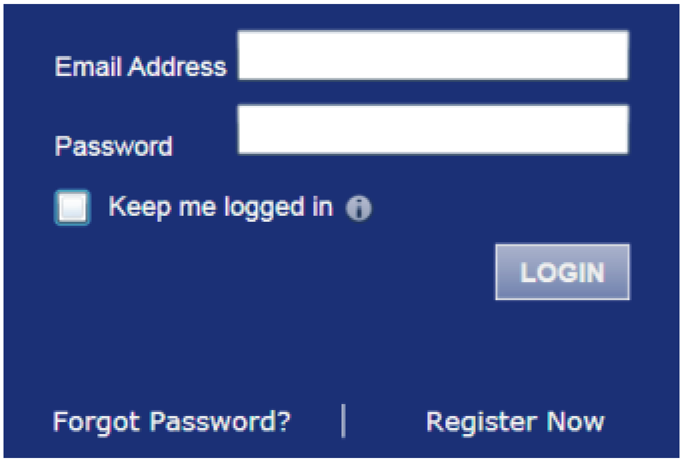


Figure 5.7 – Login Window

1. Click the Forgot Password? link on the **Login** window.

   The **Reset Password** window opens.

Figure 5.8 – Reset Password – E-mail Address

2. Type the e-mail address you provided during the registration process in the **E-mail Address** field.

   Note: An error message stating that no user is registered with the email address is displayed if the system is unable to find your email address.

3. Click the Next button to continue.
4. Type your answer in the **Security Answer** field.
5. Click the Ok button, or click the Cancel button to cancel the reset password process.

   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. Go to your email inbox.
7. Locate the email from no-reply@tylerhost.net.
8. Click the link labeled **Click here** to reset your password.

   You will be prompted to choose 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 the *Change Password* button.

    A confirmation screen displays: **Your password has been changed successfully.**

My Account

The **My Account** page displays the **Change Password** , the **Manage Notifications**, and the **Reviewer Preferences** tabs.

You can change your password and your security question using the **Login – Change Password** form.

You can manage the e-mail notifications that you wish to receive using the **Manage Notifications** tab.

You can manage your queue preferences using the **Reviewer Preferences** tab.

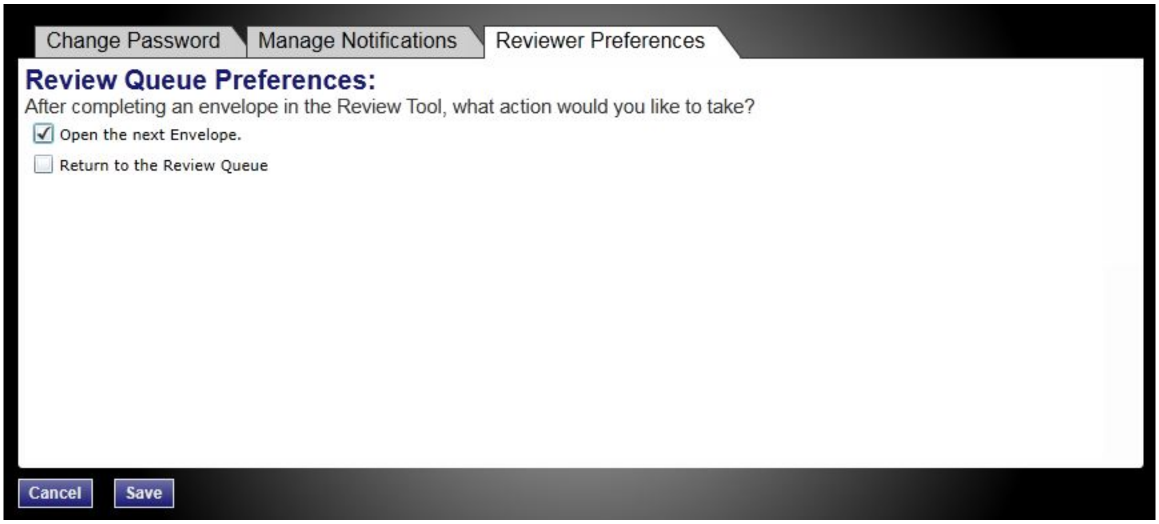


Figure 5.9 – Review Queue Preference Tab

Changing the User Password

You can change your password using the **Login – Change Password** screen.

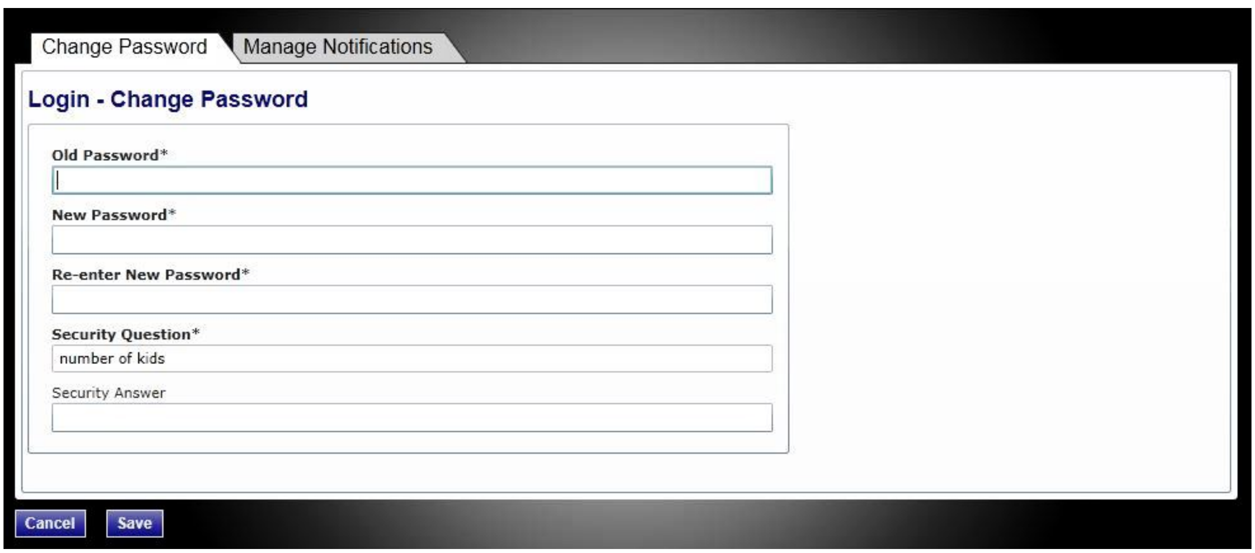


Figure 5.10 – Login – Change Password Screen

Note: Your password is case sensitive and must be at least six characters in length.

Perform the following steps to change the user password:

1. Click the MY ACCOUNT link at the top of the page.

   The Change Password tab opens the **Login – Change Password** screen.
2. Complete the **Login – Change Password** form by entering your account information.

   Note: You can unlock your account by using the Forgot Password? option. If a security question is associated with the account, you will not have to contact the Firm Administrator to reset your password.

3. Click Save to change your password, or click Cancel to exit without changing your password.

CHANGING THE SECURITY QUESTION

You can change your security question.

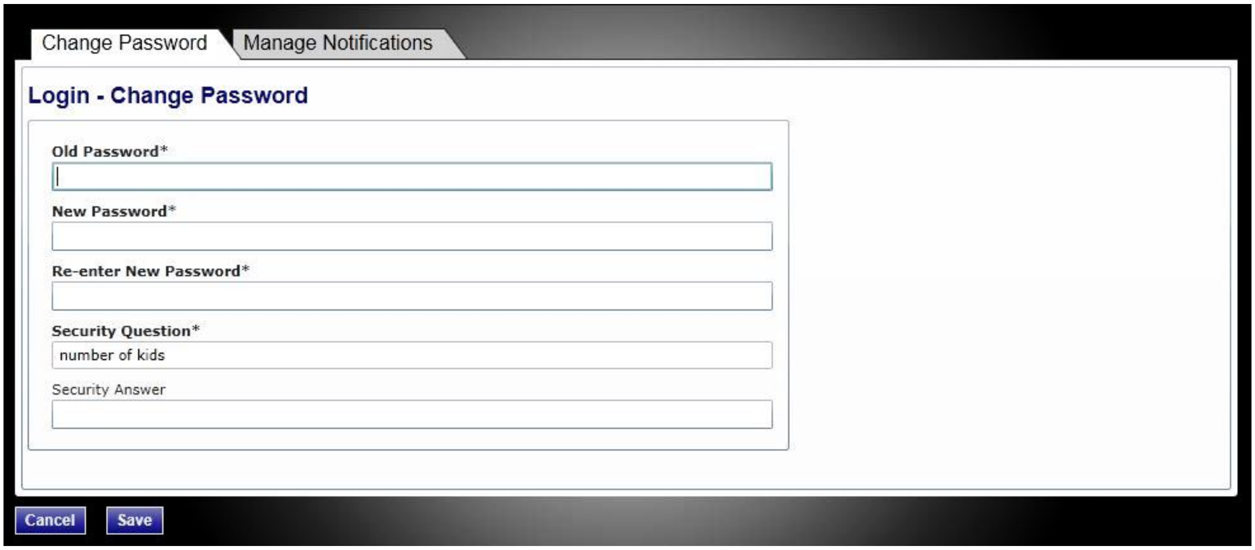


Figure 5.11 – Change the Security Question

Perform the following steps to change the security question:

1. Click the MY ACCOUNT link at the top of the page.

   The Change Password tab opens the **Login – Change Password** screen.
2. Change your security question and answer by entering your new information in the **Security Question** and **Security Answer** fields.
3. Click Save to change your password, or click Cancel to exit without changing your password.

Managing Email Notifications

You can manage the email notifications that you wish to receive from File & Serve using the **Manage Notifications** tab on the **My Account** screen.

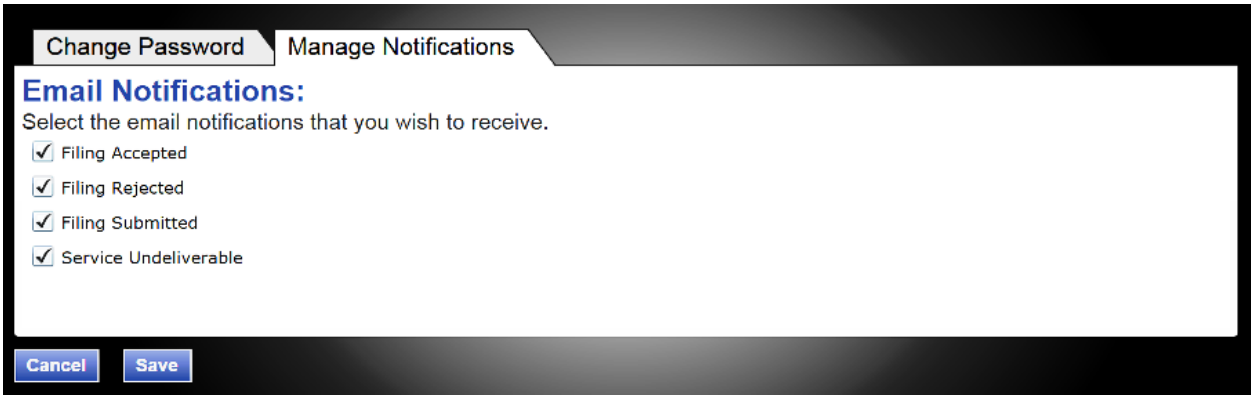


Figure 5.12 – Manage Notifications Screen

Perform the following steps to manage your e-mail notifications:

1. Select the **Manage Notification** tab on the **My Account** screen.
2. Select the notifications you want or clear the notifications you do not want to receive.
3. Click the Save button to save your selection; click the Cancel button to cancel.

Managing Reviewer Preferences

Reviewers now have the option to specify their queue preferences. Reviewers now have the option to advance to the next envelope or to exit the envelope and return to the Review Queue once they are done working the envelope.

You must have reviewer privileges to access the Review Queue.

Perform the following steps to access the Review Queue:

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

Figure 5.13 – Workspace Toolbar

2. Click the **Reviewer Preferences** tab.

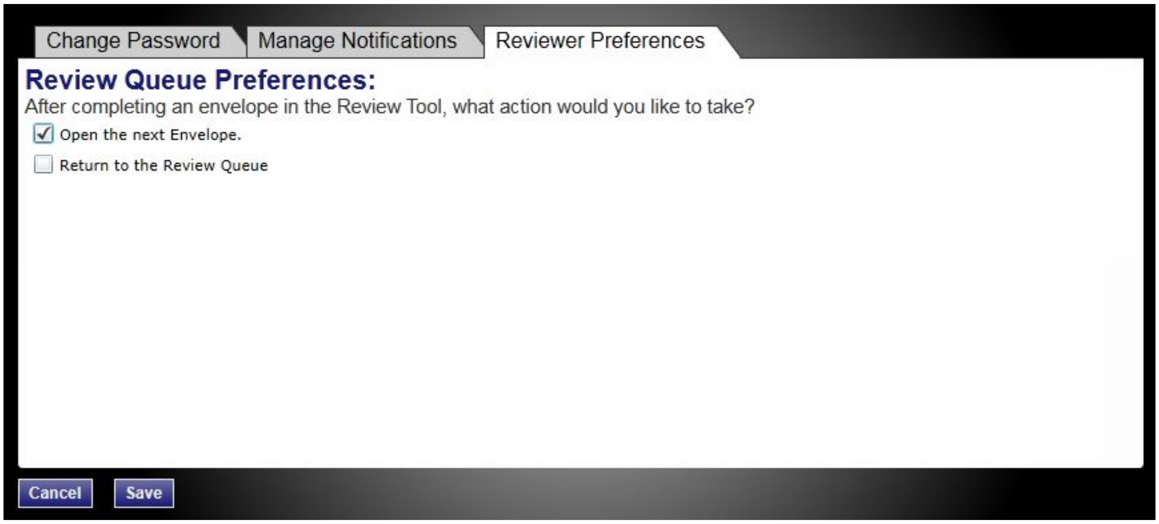


Figure 5.14 – Reviewer Preferences Tab

3. Select the check box of your preference.
4. Click **Save** to save your preferences, or click **Cancel** to exit without changing your preferences.

Chapter 6 Accessing the Review Queue

Topics Covered in This Chapter

The Review Queue allows reviewers to work cases.

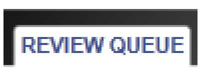
You must have reviewer privileges to access the Review Queue.

Perform the following steps to access the Review Queue:

1. Click the 

link at the top of the page.

Figure 6.1 – Workspace Toolbar

2. Click the 

link on the toolbar.

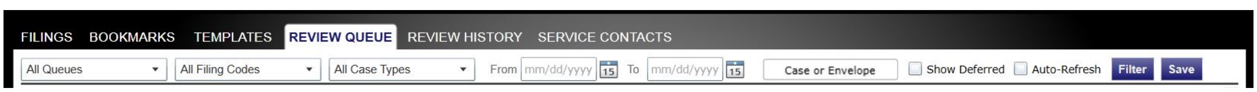


Figure 6.2 – Review Queue Selected

The **Review Queue** window opens.

Note: Hover over the case status for tool tips regarding the status of the case.

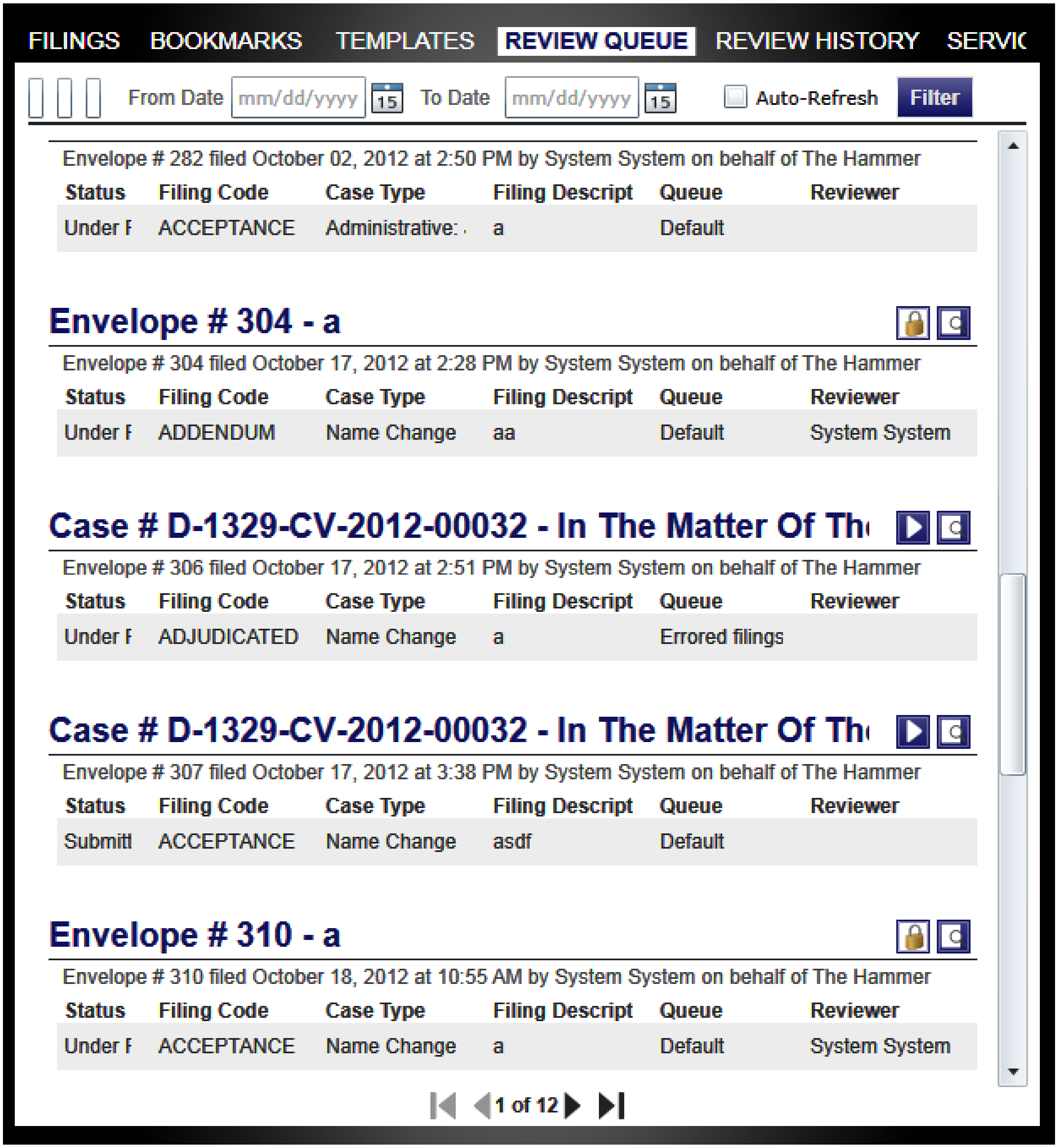


Figure 6.3 – Review Queue Window

3. Click the icon for the case you want to retrieve for review.

   Note: You can filter the case in the queue by using specific parameters. Refer to Filtering the Review Queue, page 25 for more information.

   The (Locked by User) icon displays on an envelope when another reviewer is reviewing the envelope or currently has the envelope open. **Note: The Court Administrator can remove the lock if needed. A message will display when you refresh your screen that a lock has been removed.**

Filtering the Review Queue

Use the **Review Queue** filter to view only those filings that you require.

Note: Only you and your court may see this information.

1. Select the filter parameters using the drop-down lists or enter specific information in the search fields.

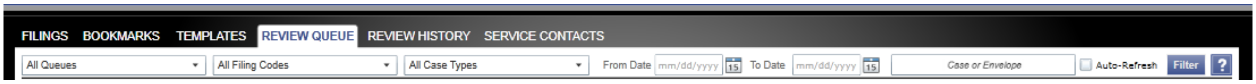


Figure 6.4 – Review Queue Filter

Note: For the From Date or the To Date, click the icon to select dates from a calendar, or you can type the dates manually (for example, `9/9/2010`).

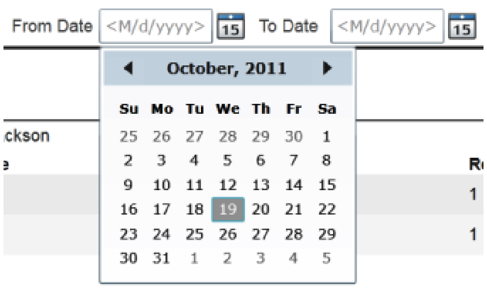


Figure 6.5 – Select the Dates Using the Calendar

2. Click **Filter** to filter the search.

   Note: To clear the filter, select Review Queue on the toolbar.

   A list of cases meeting your search criteria displays.

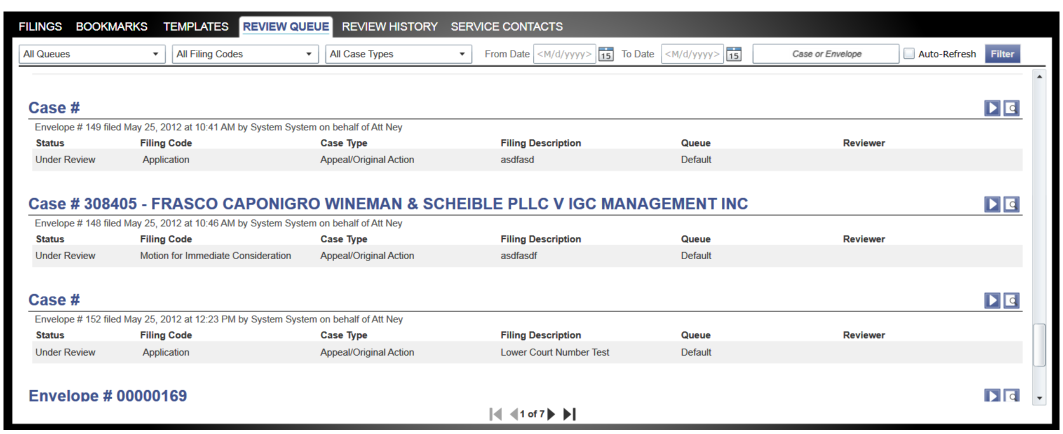


Figure 6.6 – Review Queue Screen

3. Click the icon for the case you want to retrieve for review.

Saving Default Filters

The default filter allows the reviewer to save a filter commonly used when searching for cases. The default filter can be cleared by clicking the *Clear* button.

Perform the following steps to save a default filter:

1. Select the *Review Queue* tab at the top of the page.
2. Select the filters on the toolbar using the drop-down lists.
3. Click the *Save* button to save the filters.

   Note: The filters will be saved until you log in using a different ID. To reset a filter, clear the filter, then click the Save button. The default filter can be cleared by clicking the *Clear* button.

Chapter 7 Working in the Review Queue

When you select a filing to review, the **User Interface** window opens.

Review Queue Overview

This section describes the envelope, filing information and service contacts sections, the document display window, the annotation tools, the review actions buttons, the paging arrows, and the fit-to-window arrows.

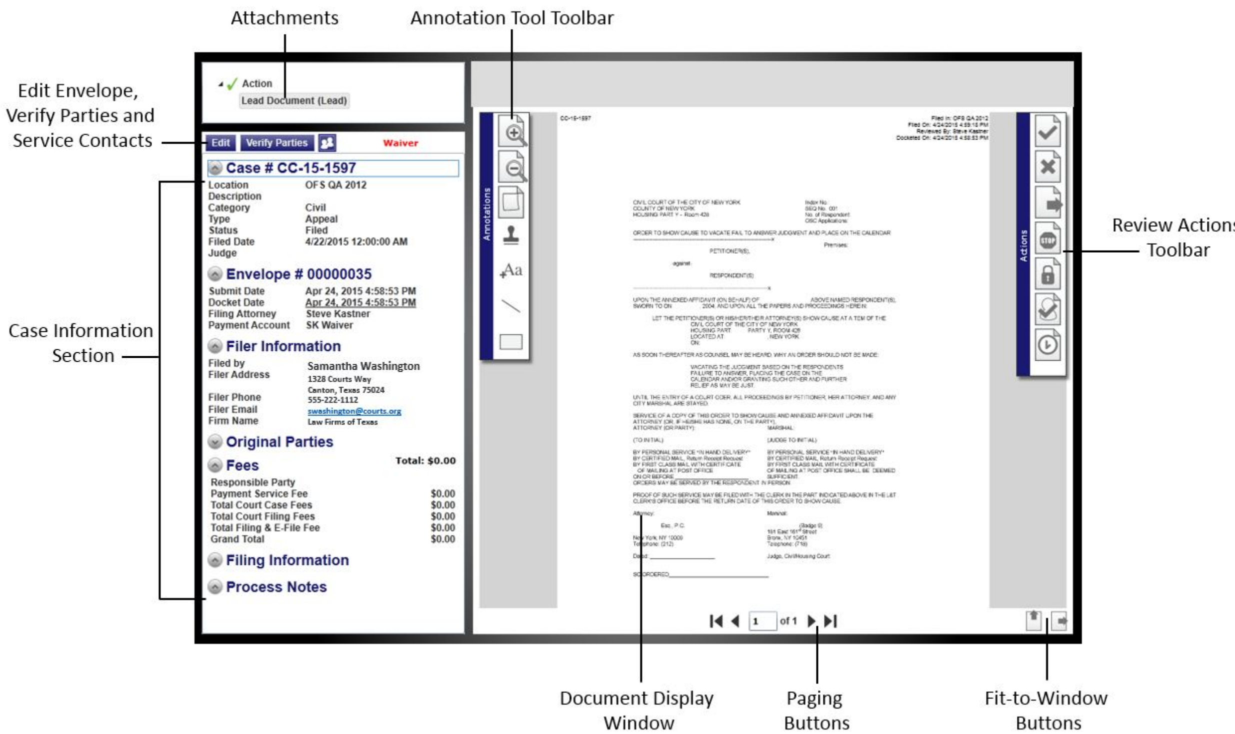


Figure 7 .1 – Review Queue User Interface

Attachments

The **Attachments** section displays any documents attached to the envelope.

Envelope, Filing Information and Service Contacts Section

The **Envelope, Filing Information and Service Contacts** section displays the case information, the envelope information, the service contacts, the parties involved in the case, the fees association with the filing, and any filer comments.

Document Display Window

The **Document Display** window displays the currently selected filing document. This window contains the **Annotation Tools** toolbar, the **Review Actions** toolbar, paging arrows, and fit-to-window arrows.

Annotation Tools Toolbar

The **Annotation Tools** toolbar default location is on the upper left edge of the **Document Display** window. It provides tools to zoom in or out of the document or add text annotations, lines, highlights, and image stamps. Pause your mouse over a button to display a tooltip describing the button's function. Both the **Annotation Tools** toolbar and the **Review Actions** toolbar may be selected and moved anywhere within the **Document Display** window.

Review Actions Toolbar

The **Review Actions** toolbar default location is on the upper right edge of the **Document Display** window. It provides tools to accept the filing, reject the filing, forward the filing, end the review, change the document security, manually accept the filing, or send the filing back to filer. Pause your mouse over a button to display a tooltip describing the button's function. **Note: Toolbar options vary by site.**

Paging Arrows

The paging arrows allow you to access different pages in the document.

Note: You must use the paging arrows to navigate to a specific page. Review actions will vary depending on client site.

Fit-to-Window Arrows

The fit-to-window arrows allow you to modify the document display.

Chapter 8 Review Envelope and Filing Information

Topics Covered in This Chapter

The **Envelope and Filing Information** section displays case and envelope information, filer information, parties involved in the case, fees associated with the case, and filer's comments.

Click to collapse the information, or click to expand the information.

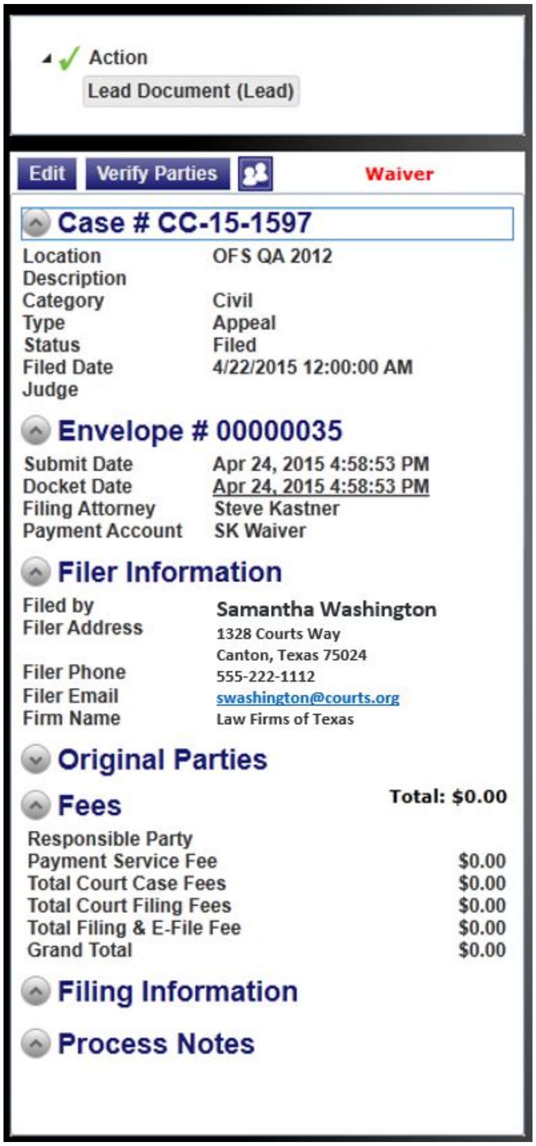


Figure 8.1 – Envelope and Filing Information Section

Attachment Section

The **Attachment** section displays the lead documents and all other attachments for the case. There may be one or more documents listed in the attachment section.

Figure 8.2 – Attachment Section

The system displays a notification when a document is submitted in an unsupported file type.

Note: Unsupported document types will not transmit to the Case Management System (CMS).

Microsoft Word files are not a supported file type, but a filer can upload Microsoft Word files as an attachment if the county accepts this document format type. **Note: PDF is the recommended file upload format.**

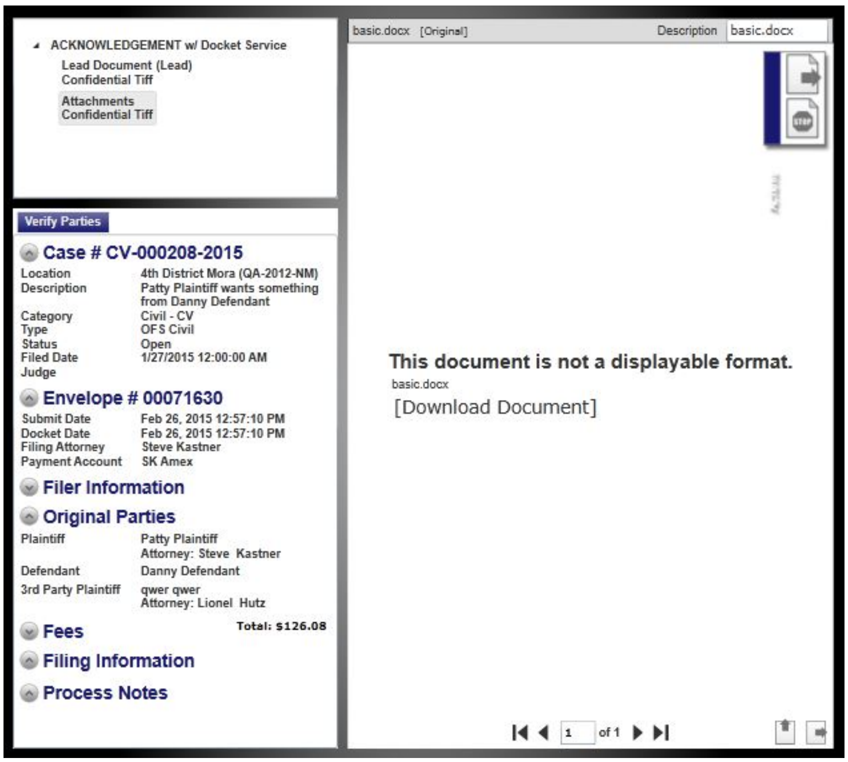


Figure 8.3 – Unsupported Document Type Notification

Determine which document you want to work, and click the link on the document to display the document in the **Document Display** window.

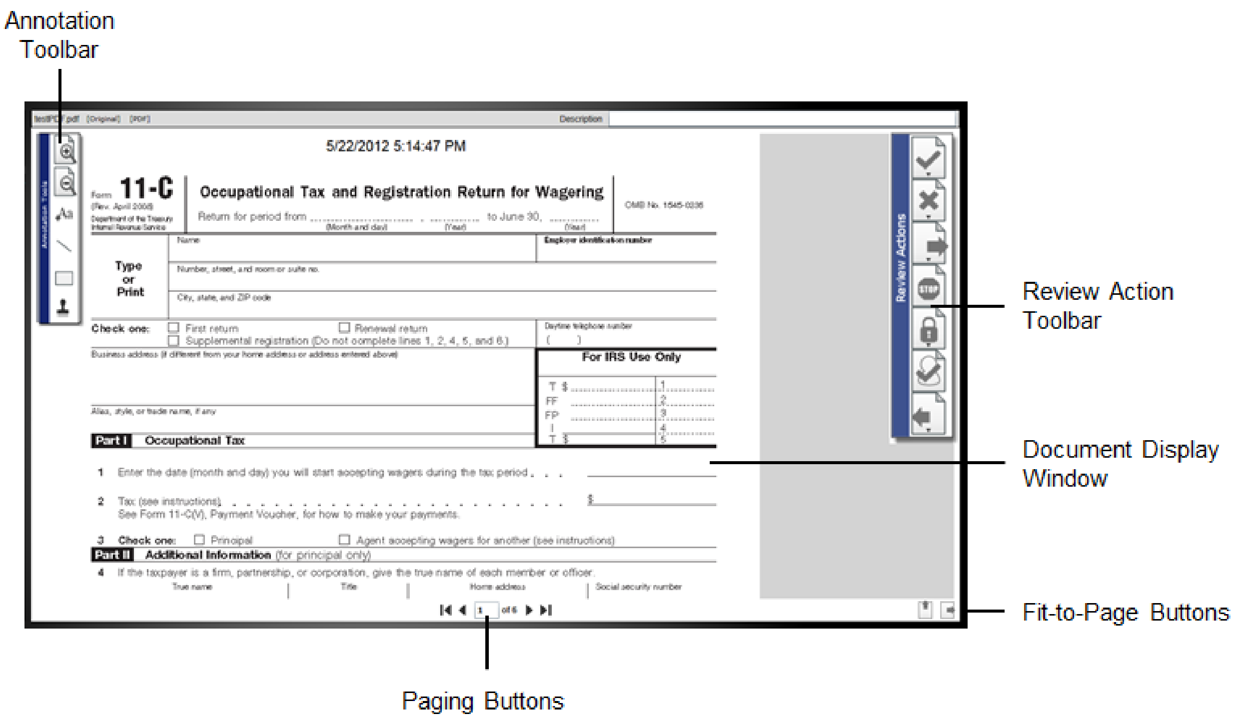


Figure 8.4 – Document Display Window

EDIT ENVELOPE INFORMATION

For new cases, envelope information can be edited by clicking the Edit button, located above the **Case Information** section.

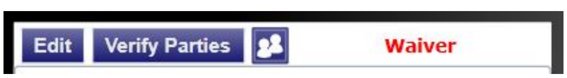


Figure 8.5 – Edit and Verify Parties Toolbar

On subsequent filings, you can edit the party information by clicking the Edit button. This opens the *Edit Envelope* window and allows you to edit the information as needed. You can also remove an attorney from the case by clicking the  icon. If you are reviewing a new case filing, review the submitted party information to confirm it is accurate before accepting the new case filing.

You can correct or extend the filing information based on the court procedures associated with e-filing or from information obtained within the documents submitted by the filer. For example, you can add an additional party referenced in the document to the filing, or you can correct the spelling of a party name to match the spelling in the submitted document.

You can also correct any of the filing domain items, such as case type or filing code.

TOTAL AMOUNT MISMATCH ERROR

A reviewer can edit the filing code or the associated fee during the review process.

Note: The *Total Amount Mismatch* error message is displayed when a reviewer edits the filing codes or fees after the system has captured the funds for the filings.

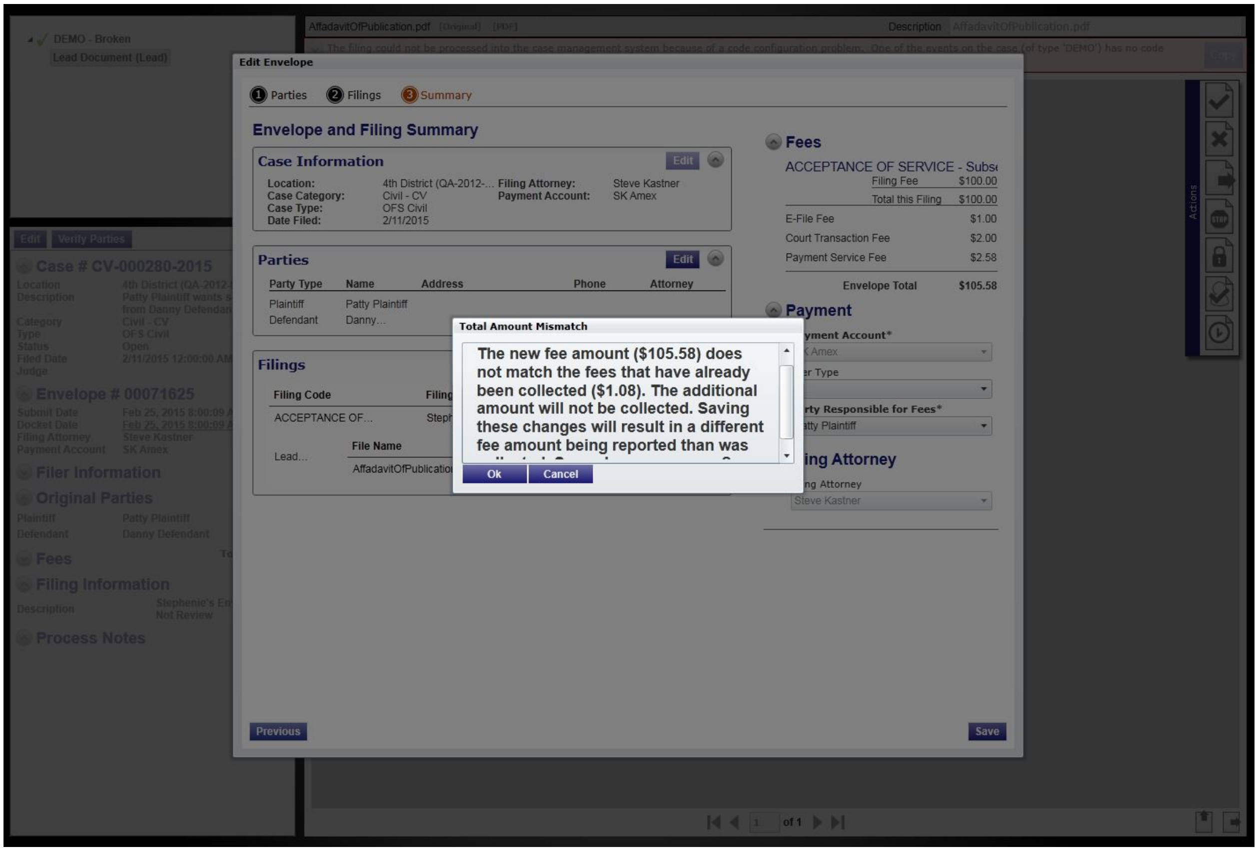


Figure 8.6 – Total Amount Mismatch Error Message

Verify Party Information

The **Parties** section displays information regarding the parties connected to the case.

Click the **Verify Parties** button to view the party information.

The *Verify Parties* window opens.

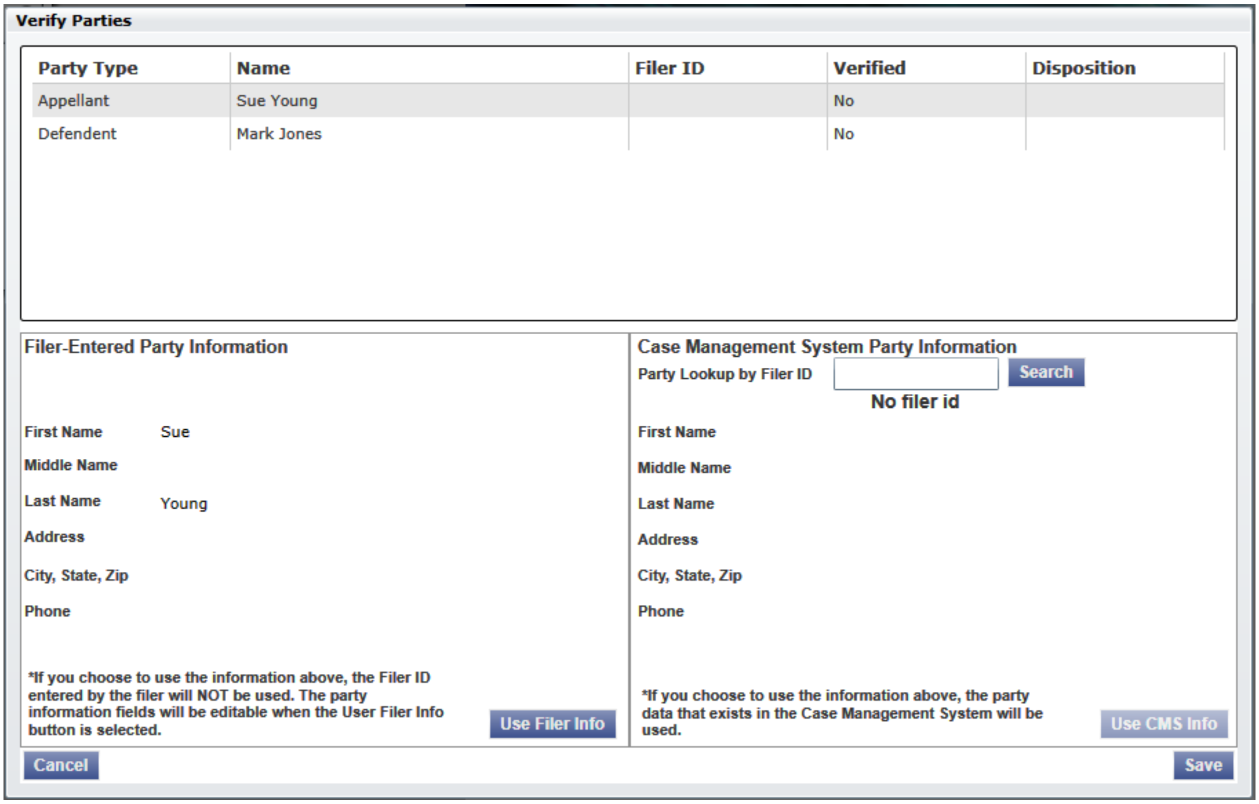


Figure 8.7 – Verify Parties Window

For new cases, the party information can be edited by clicking the **Use Filer Info** button in the **Filer-Entered Party Information** window. If you are reviewing a new case filing, ensure the party information is accurate before accepting the new case filing. For subsequent filings, the party information cannot be edited.

Filer-Entered Party Information

The **Filer-Entered Party Information** section displays the name and address of the party entered by the filer.

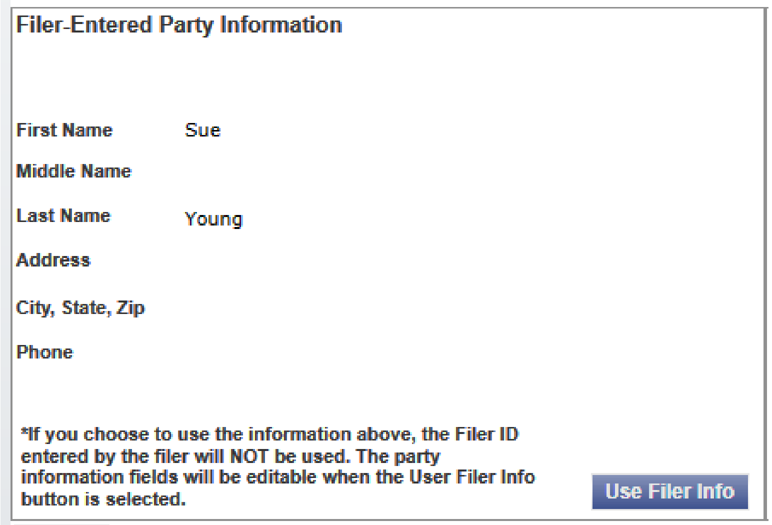


Figure 8.8 – Filer-Entered Party Information Section

Case Management System Party Information

The **Case Management System Party Information** section pulls filer information from the party information entered into Case Manager.

Enter the filer ID in the field provided, and then click the Search button to populate the fields.

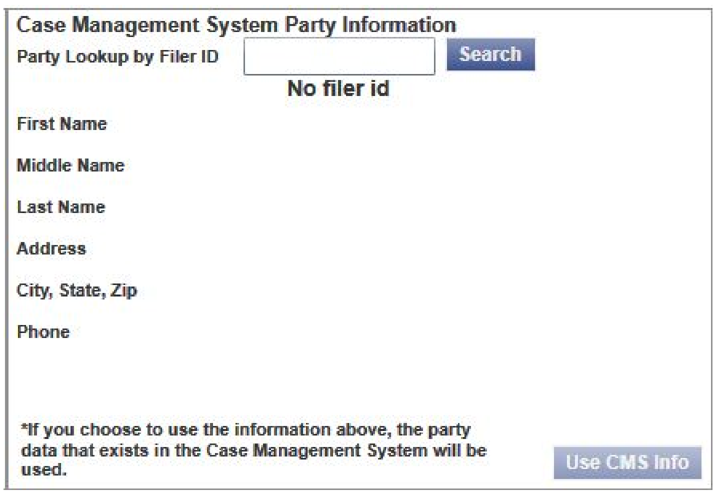


Figure 8.9 – Case Management System Party Information Section

Viewing Service Contacts History

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

   This action opens the **Workspace** window.
2. Locate the case that you want to view the contact's service history.
3. Click the icon for the case you want to retrieve.

   This action opens the **Review Queue User Interface** window.

4. Click the icon to view the service contact information.

   This opens the **Service Contacts** tab.

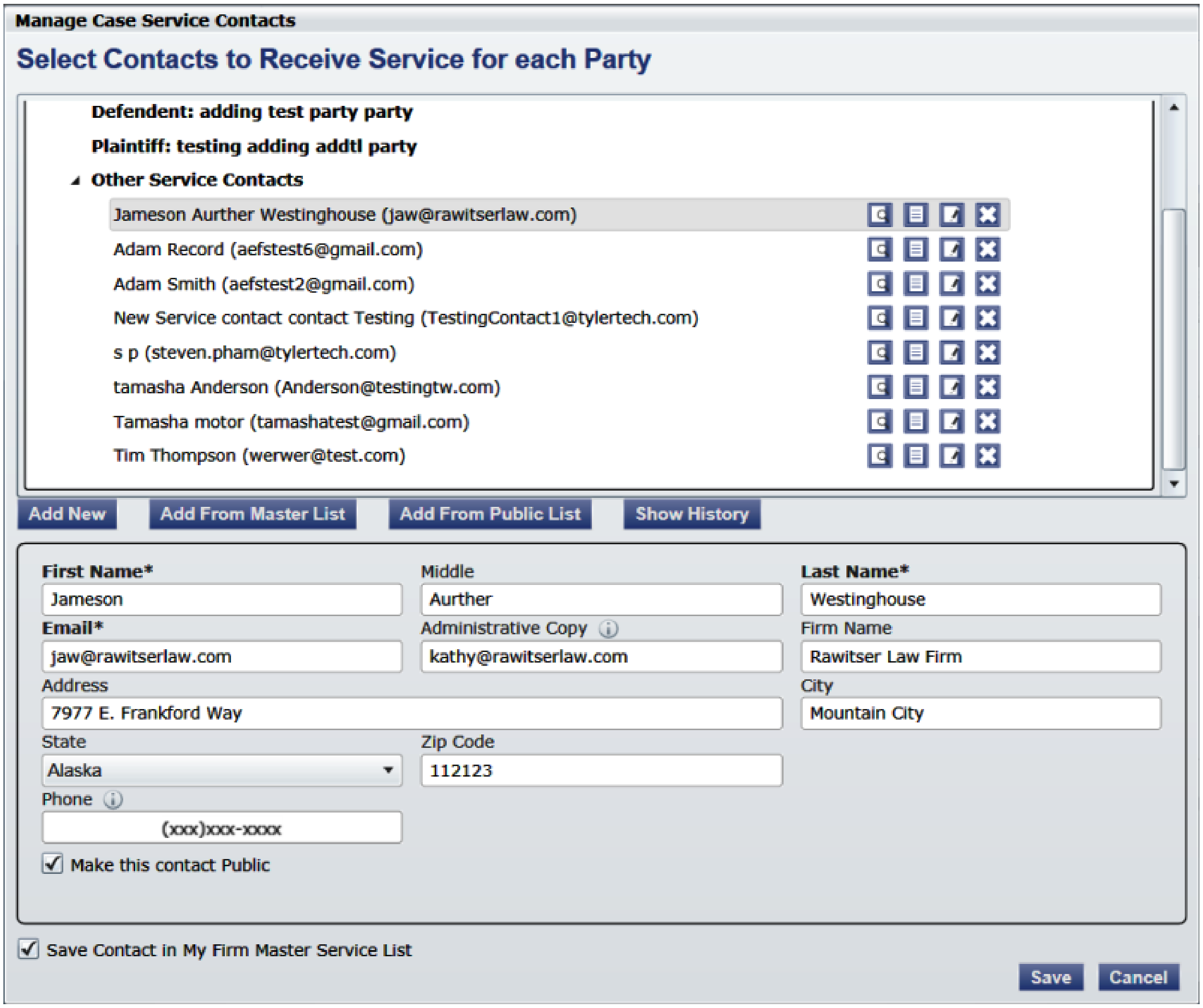


Figure 8.10 – Service Contacts Tab

5. Select a service contact from the list.
6. Click the **Show History** button to view the history of the contact selected.

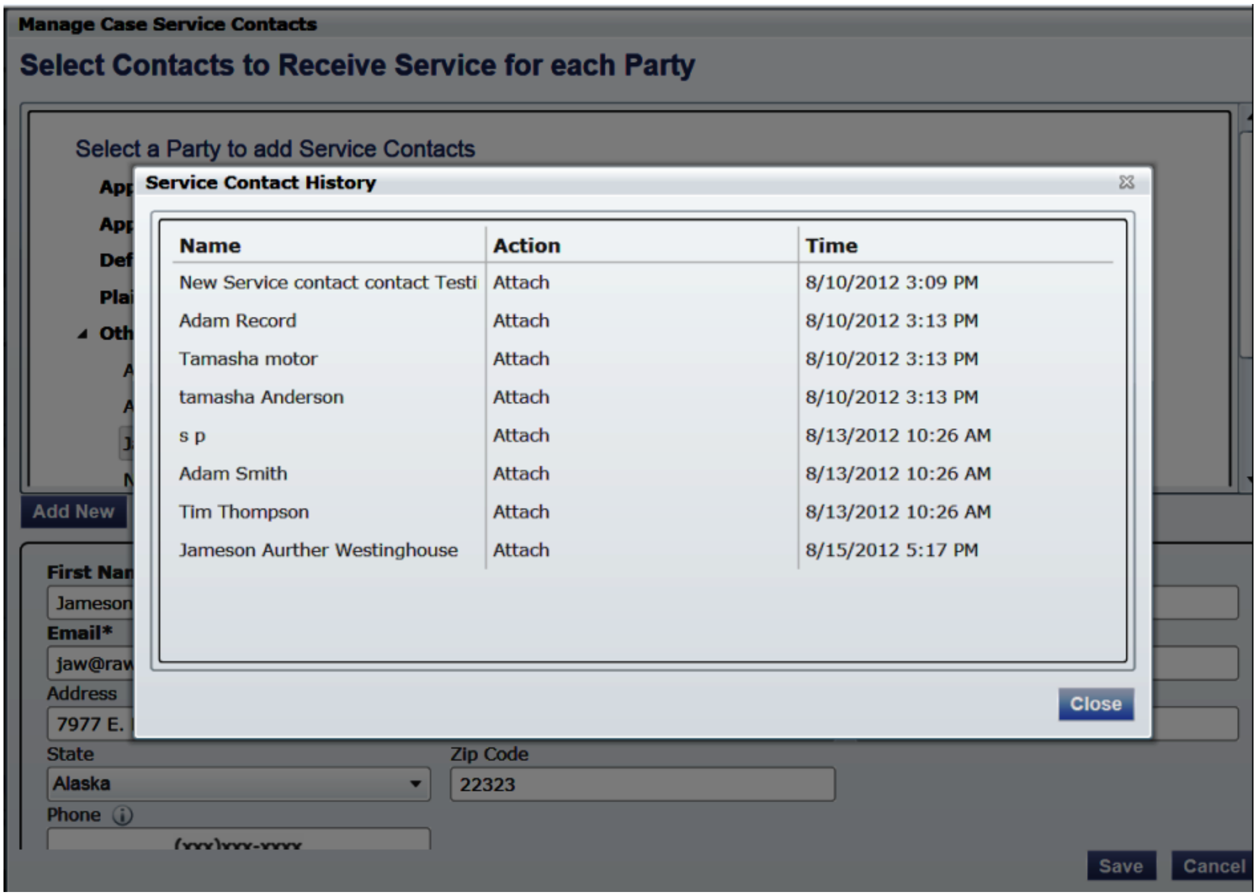


Figure 8.11 – View Service Contact History

7. Click the 

to close the window and return to the service contacts page.

Review Case Information

The **Case Information** section displays the case filing information.

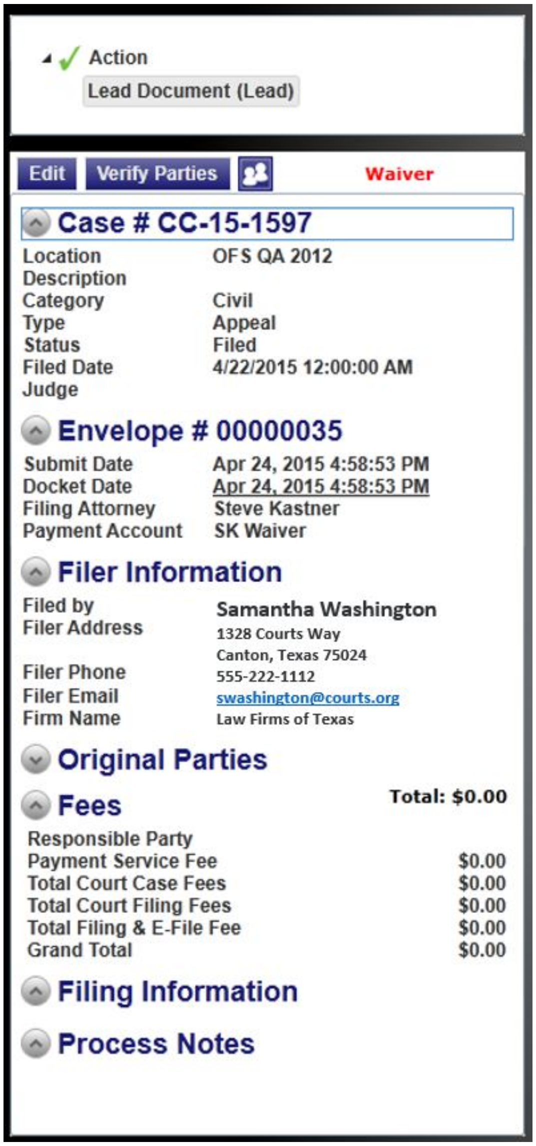


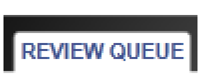
Figure 8.12 – Case Information Page

- Check the case information to make sure the information is correct.
- Check to see whether a judge is assigned to the case. If not, go to Manually Assigning a Judge to a Case, page 38 for the required steps.
  Note: Certain case types require the reviewer to assign a judge to the case.

Manually Assigning a Judge to a Case

You can manually assign a judge to a case using the manual judge assignment feature.

Perform the following steps to manually assign a judge to a case:

1. Select the 

tab on the toolbar.

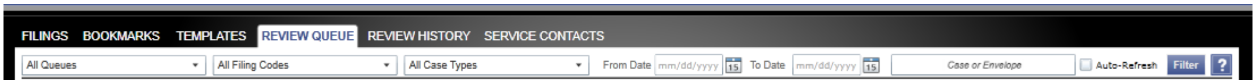


Figure 8.13 – Review Queue Selected

2. Select a judge from the drop-down list of judges in the **Case Information** section.

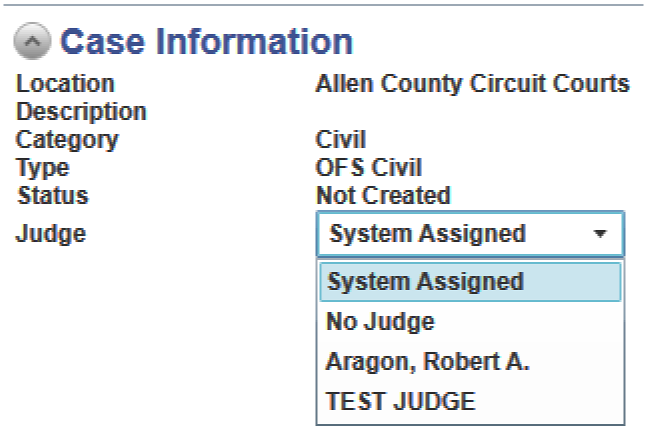


Figure 8.14 – Judge Selection Drop-down List

This action assigns the selected judge to the case.

Review Envelope Information

The **Envelope** section displays the envelope number for a new filing or the case number for a subsequent filing, the submitted and docket date, the filing attorney for the case and the type of payment account associated with the case.

Click the arrow to collapse the information, or click the arrow to expand the information.

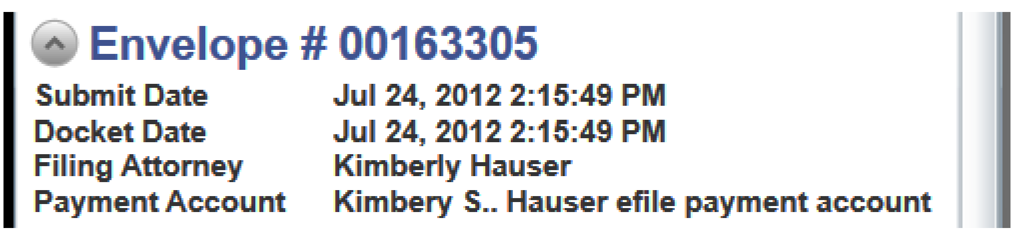


Figure 8.15 – Envelope Information Section

Review the envelope information to ensure the information is correct.

Edit Docket Date and Time

Select the underlined link under the date and time to edit the current docket date. This opens the calendar and clock.

Select a different docket date and time using the calendar and clock option.

Figure 8.16 – Docket Date Calendar

Review Filer Information

The filer's contact information is displayed in the **Filer Information** section.

Click the arrow to collapse the information, or click the arrow to expand the information.

Review the **Filer Information** section to verify the contact information.

Figure 8.17 – Filer Information Section

Sending Emails to Filer

A reviewer can send an email to the filer's email address listed under *Filer Information* in the *Envelope* section.

Perform the following steps to send an email to the filer:

1. Click the email address link next to the *Filer Email* field in the *Filer Information* section.

Figure 8.18 – Filer Information Section

2. Click the link for the email address. This opens your email default email tool.

   This opens your default email tool as a mailto: link.
   Note: Some browser or system combinations will open a new and empty browser window or tab. This is a expected behavior and a result of how the Silverlight plug-in interacts with the browser and OS for opening mailto: links.
3. Type the email and send to the filer.

Review Original Parties

The **Original Parties** section provides the information of the parties that initiated the filing.

Click the arrow to collapse the information, or click the arrow to expand the information.
Review the **Original Parties** section to determine the parties that initiated this filing.

Figure 8.19 – Original Parties Section

Filing Fees

The **Fees** section displays the filing fees set by the courts.

Note: If you are reviewing a new case filing, review the filing fees to confirm they are accurate before accepting the new case filing as this will charge the payment account when accepted.

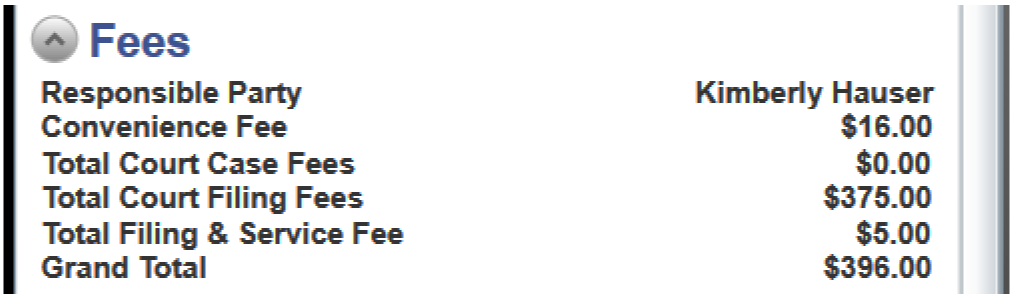


Figure 8.20 – Filing Fees

Review Filer Comments

The **Filer Comments** section includes any comments the filer may have added for the reviewer to read.

Click the arrow to collapse the information, or click the arrow to expand the information. Review the **Filer Comments** section for any comments the filer may have entered.

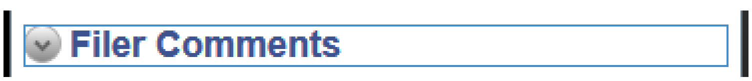


Figure 8.21 – Filer Comments Section

Review Filing Information

The **Filer Information** section includes the information of any parties associated with the filing.

Click the arrow to collapse the information, or click the arrow to expand the information. Review the **Filing Information** section to determine what parties are associated with the filing.

Figure 8.22 – Filing Information Section

Review Process Notes

The **Process Notes** section includes notes reviewers add to a filing for their organization.

Click the arrow to collapse the information, or click the arrow to expand the information.

Review the **Process Notes** section for any notes a reviewer may have entered.

Note: Process notes are written by reviewers while working a filing. These notes are used for internal communication only. Process notes are not a part of the filing; they are not transmitted to Odyssey, and they can only be seen by other reviewers in their court.

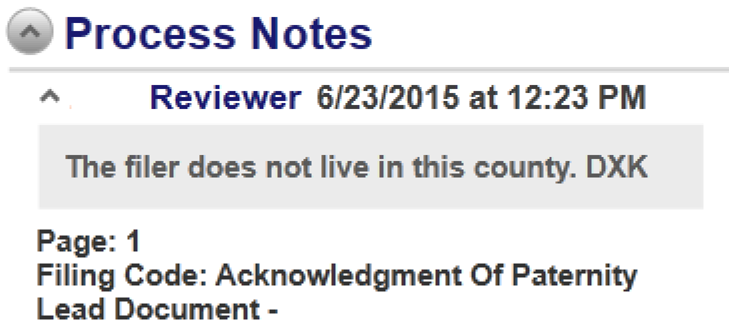


Figure 8.23 – Process Notes Section

Chapter 9 Adding Annotations

Topics Covered in This Chapter

♦ Zooming In and Out
♦ Paging Arrows
♦ Fit-to-Window Arrow Buttons

Use the **Annotation Tools** toolbar to add text annotations and lines to documents. You can also highlight text or upload and apply images on documents using the image stamps.

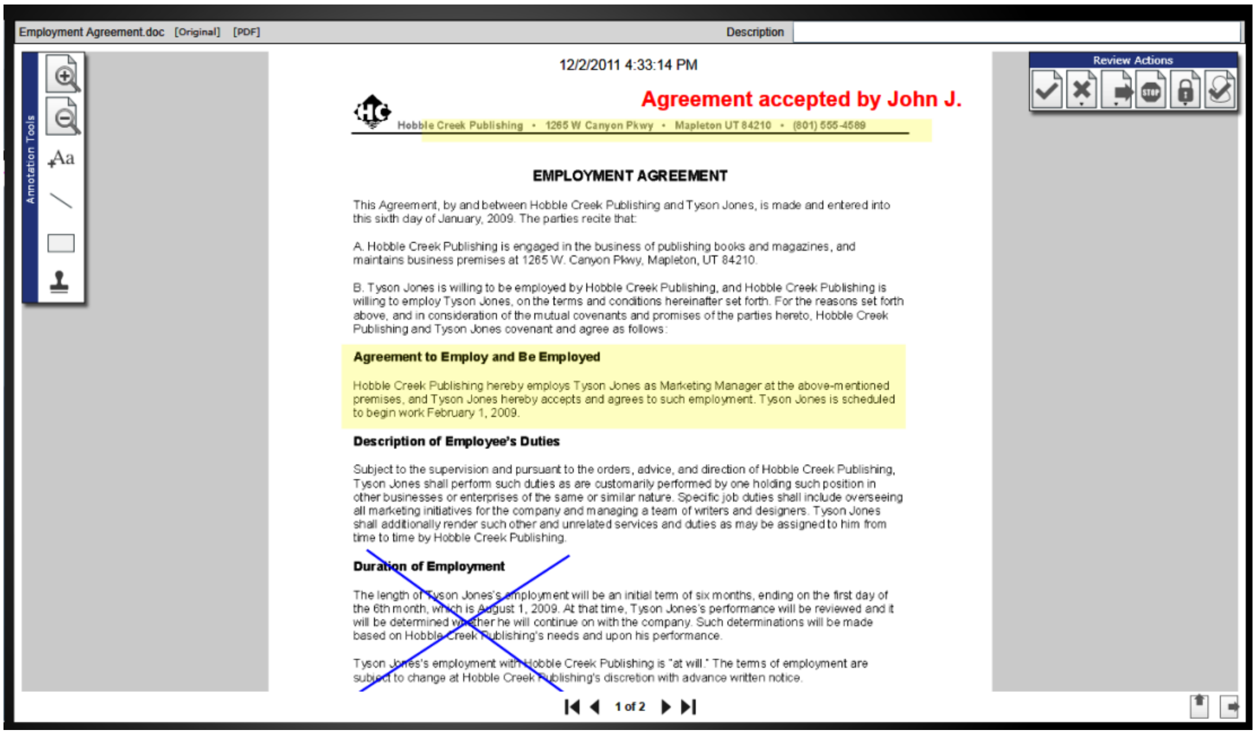


Figure 9.1 – Document Display Window with Annotations

Complete the following steps to add annotations:

1. Click  to add process notes to the document.

   Note: Process notes defaults to My Organization making the notes viewable to the reviewers in your organization. These notes are used for internal communication only. Process notes are not a part of the filing; they are not transmitted to Odyssey, and they can only be seen by other reviewers in their court.

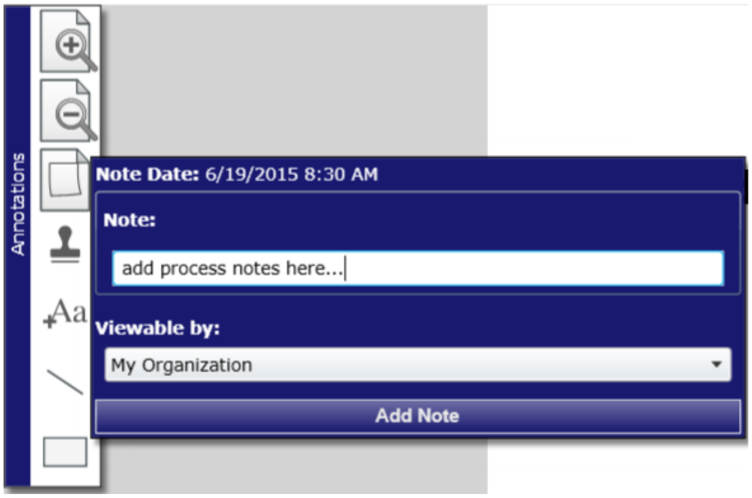


Figure 9.2 – Adding Process Notes

2. Click to add the available text or image stamps options to the document.

   The image stamp gives the reviewer the ability to upload and apply images on documents during the review process.

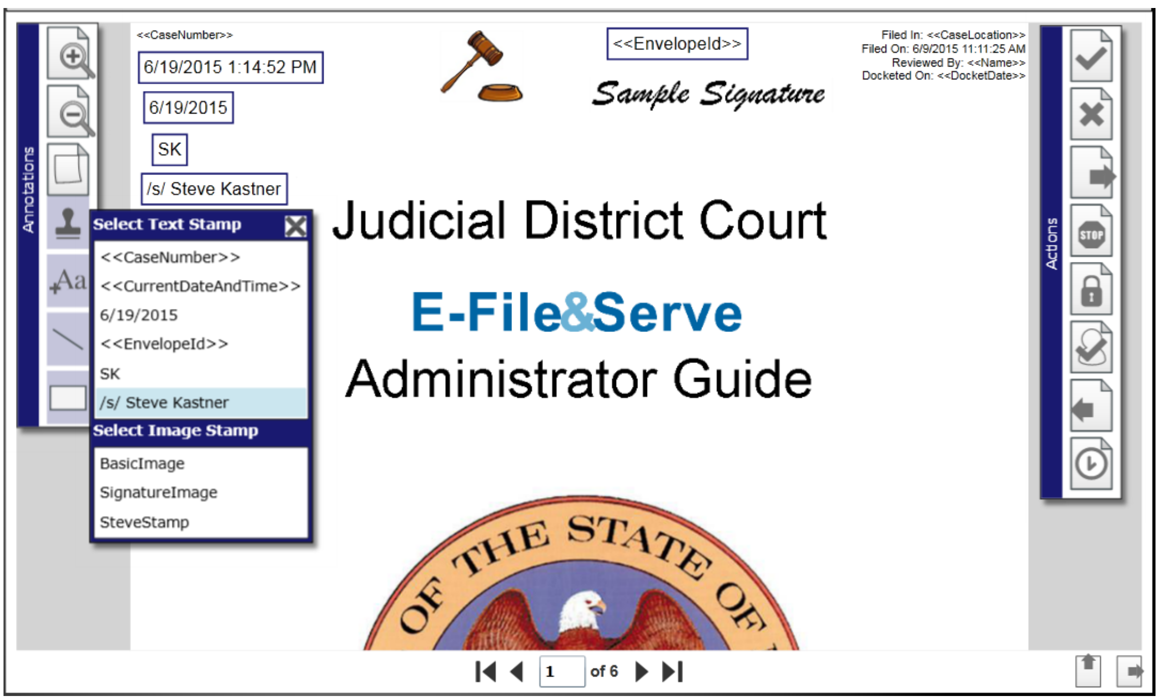


Figure 9.3 – Annotations with Text and Image Stamp Examples

   a. Select the type of stamp to apply to the document from the list.
   b. Hover over the document area and click in the section where you want the stamp applied.

      This actions applies the stamp to the document.

3. Click to add a text annotation. The text annotation dialog box opens as you begin typing. Use the text annotation dialog box to modify the font face, size, characteristics, and color.

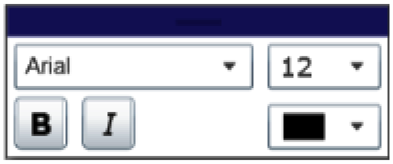


Figure 9.4 – Modifying Text Annotations

4. Click to add a line annotation to your document. The line annotation dialog box displays. Use the line annotation dialog box to modify the size and thickness of the line.

Figure 9.5 – Modifying Line Annotations

5. Click to add a yellow highlight box to the document. Click and drag your mouse over the area you wish to highlight to draw the box.

Zooming In and Out

Use the zoom buttons on the **Annotation Tools** toolbar to zoom in or out.

- Click to zoom in on the document.
- Click to zoom out from the document.

Paging Arrows

The paging arrows allow you to access different pages in the document.

Note: You must use the paging arrows to navigate to a specific page. Review actions will vary depending on client site.

- goes to the first page of the document.
- goes to the previous page.
- goes to the next page.
- goes to the last page.

Fit-to-Window Arrow Buttons

The fit-to-window arrow buttons allow you to modify the document display.

- The  (fit-to-window arrow button) scales the image so that it fits the entire height of the *Document Display* window. The width automatically scales to the new height, ensuring the document's visual presentation is not distorted.
- The  (fit-to-window arrow button) scales the image so that it fits the entire width of the **Document Display** window. The height automatically scales to the new width, ensuring the document's visual presentation is not distorted.

CHAPTER 10 PERFORMING REVIEW ACTIONS

TOPICS COVERED IN THIS CHAPTER

♦ RETURN FOR RESUBMISSION

The reviewer can use the **Review Actions** toolbar to perform review actions on a filing.

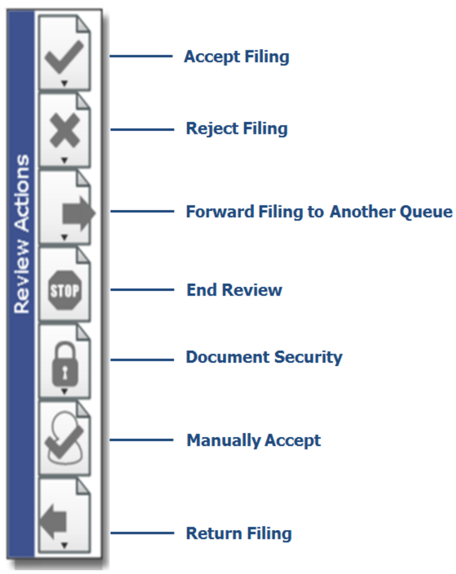


Figure 10.1 – Review Actions Toolbar

Note: The options available on the toolbar vary based on site requirements.

Accept Filing

Click the  icon to accept the filing.

Note: If prompted, enter the case number in the Case Information field in the format assigned by your court.

Figure 10.2 – Accept the Filing Icon and Comment Window

When you select the arrow on the bottom of the icon, the **Comment** dialog box opens.

You can type notes in the **Comment** field.

Reject Filing

Click the  icon to reject the filing.

Note: The system now requires the reviewer to give a reason when rejecting a filing.

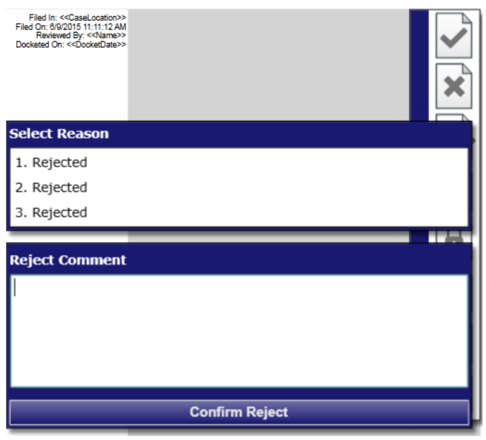


Figure 10.3 – Reject the Filing Icon, Select Reason and Comment Window

When you select the arrow on the bottom of the icon, the **Select Reason** dialog box opens.

You can select the reason from the drop-down list and enter additional notes regarding the rejection in the **Comment** field.

When a filer's submission fails, the reviewer can now send a notification to the filer that the submission failed to allow re-submission of the filing.

Note: A reviewer can reject a filing for technical reasons, e.g. the document submitted is password protected, and the reviewer is unable to open the document. The reviewer rejects the document with the request to unlock the document for viewing.

Forward Filing to Another Queue

Click the  icon to forward the filing to another queue.

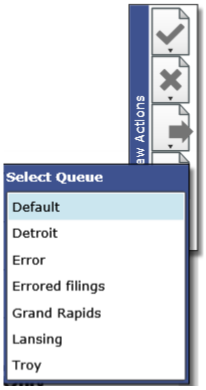


Figure 10.4 – Forward Filing Icon and Queue Selection Window

When you select the arrow on the bottom of the icon, the **Select Queue** dialog box opens. Select a queue from the list.

End Review

Click the  icon to end the review and return the filing to the queue without changing the status.

Document Security

Click the  icon to change the security of the document.

Note: The color changes when the icon is selected.

The **Select Document Type** dialog box opens.

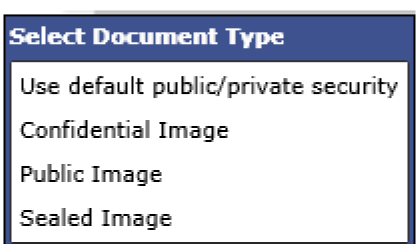


Figure 10.5 – Select Document Type Window

Note: This selection only affects security for the document displayed, not for the entire envelope.

Manually Accept

Note: Prior to the selecting the Manually Accept filing icon, create a case number in Odyssey to assign to the case you plan to manually accept. When you manually accept a filing, the case number is not automatically assigned to the initial case.

Click the  icon to manually accept the filing.

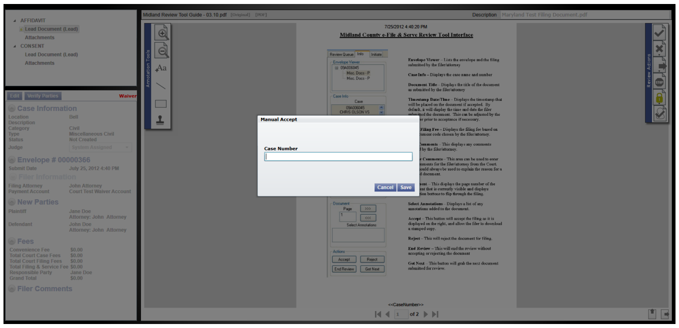


Figure 10.6 – Manually Accept Case Number Window

- Manual accept requires a case number to be provided before the review is completed.
- The filing is marked as accepted.
- Service notifications are sent.
- Financial information is captured in Chase.

Return Filing

Click the  icon to return filings that have missing or incorrect information.

Note: The reviewer or court should contact the filer to let them know what corrections need to be made to the filing before the filing is returned to the filer.

Once the filing is returned to the filer, the following actions occur:

- The filing leaves the review queue.
- The filing status returns to the submitted status.
- The filing appears in the filer's filing queue with the submitted status and no notes to indicate the reason it was returned.

The filer must cancel the filing and copy either the envelope or file into the case and make the necessary changes to the filing and resubmit. This process generates a new envelope number and authorizes the filer's credit card a second time where necessary. The filer is not charged for the original envelope.

Return for Resubmission

The Return for Revision or Resubmission feature alerts the reviewer of a filing that was copied from a previously rejected envelope. A yellow note is displayed in the form of a banner at the top of the window and provides details and a means of copying the docket date.

You must have Reviewer rights to perform this procedure.

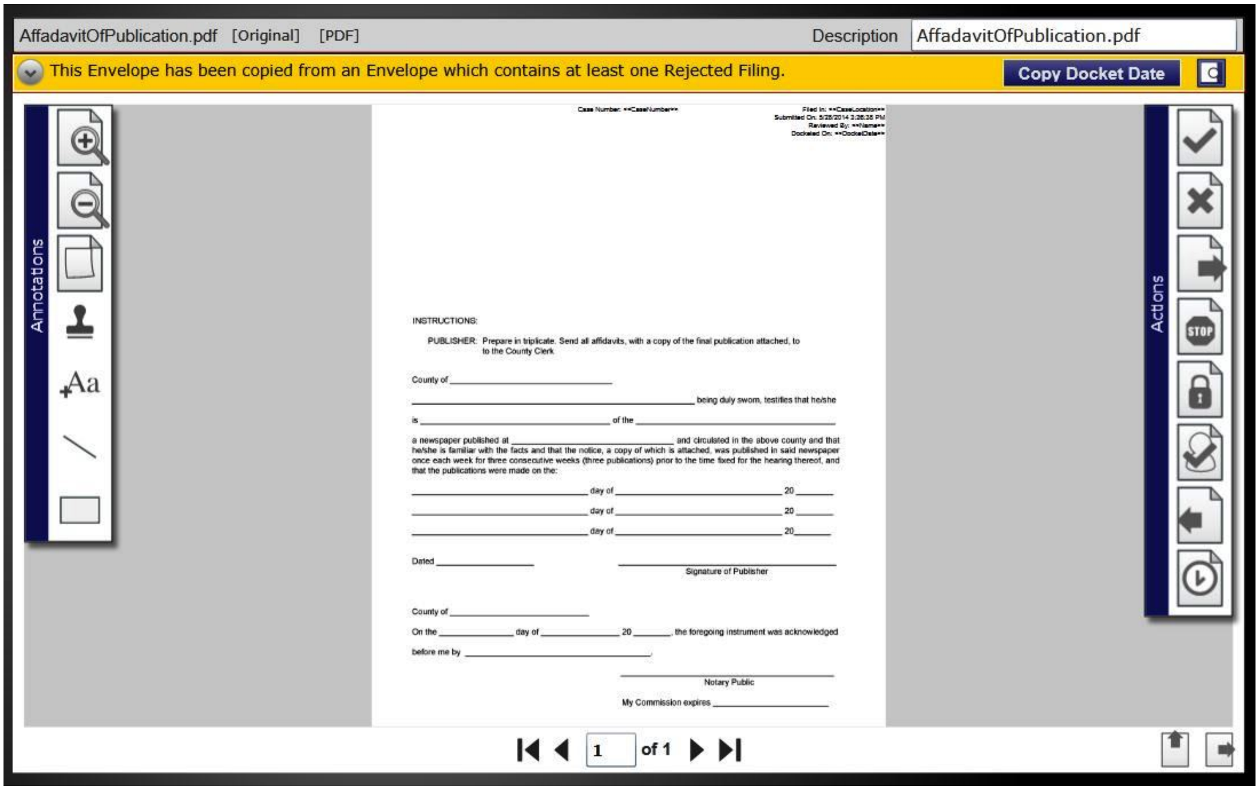


Figure 10.7 – Return for Resubmission Yellow Notice

Perform the following steps to view a filing returned for submission:

1. Log in.
2. Select the Review Queue tab.
3. Select the filing you want to work.
4. Type the Case or Envelope input cell.
5. Click the Filter button.
6. Click the Work Item icon.

The envelope date changes when a reviewer clicks the Copy Docket Date button. The docket date is copied to indicate the rejected filing was submitted to the court on time. **Note: The default date for the docket date field is populated according to your system's configuration.**

Chapter 11 Review History

Review History is a main menu link visible to users with the reviewer role. The history list includes previously accepted and rejected filings processed by the current reviewer along with filings the reviewer has previously worked.

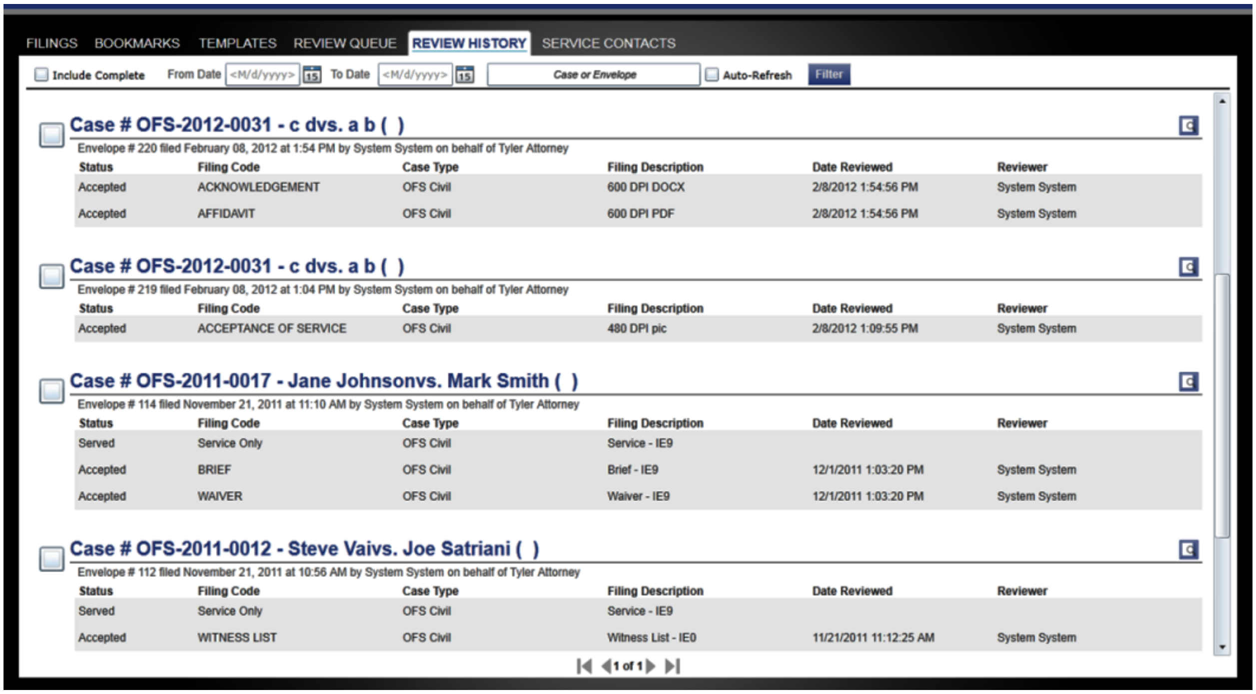


Figure 11 .1 – Review History Window

Accessing the Review History

Click the 

tab on the toolbar.

Filtering Completed Reviews

Select the check box next to the envelope to mark it as complete and the envelope is immediately removed from Review History window.

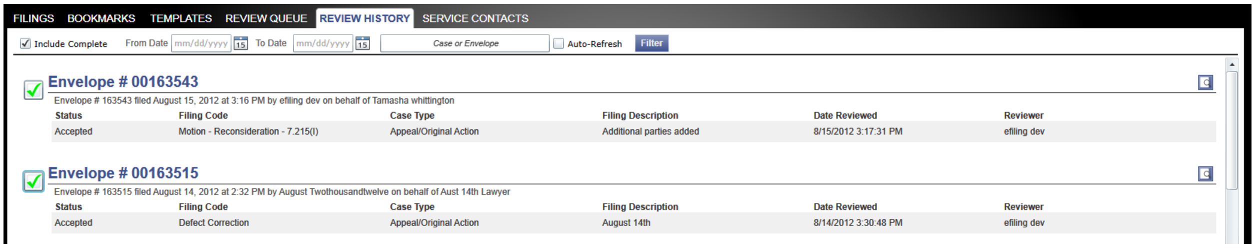


Figure 11 .2 – Completed Check Box Selected

Filtering Using Include Complete

You can remove completed filings from the **Review History** window by deselecting the Include Complete check box, then clicking the Filter button.

To re-populate the completed filings back into your **Review History** window previously filtered out, select the Include Complete check box, then click the Filter button.

Tyler Technologies Technical Support Contact Information

For assistance, contact Tyler Technologies through the following resources.

Resource	Contact Information
Odyssey File & Serve Support Hours	7 a.m. to 9 p.m. (CT), Monday through Friday
Odyssey File & Serve Support Chat	Assistance is also available online through 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.