



# **Odyssey® File & Serve**

## **Court Administrator User Guide – Release 3.11**

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# CHAPTER 1 SYSTEM OVERVIEW

## TOPICS COVERED IN THIS CHAPTER

### ◆ BEFORE YOU BEGIN

This product 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.

## BEFORE YOU BEGIN

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

**i 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 1.1 – 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 1.2 – Data Table

## Enter User Information

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

<b>First Name*</b> Amanda	<b>Middle</b> T.	<b>Last Name*</b> Watson
<b>Email*</b> awatson@ops.gov	<b>Administrative Copy</b> ⓘ info@yourfirm.com	<b>Firm Name</b> Madison-Green Law Firm
<b>Country*</b> United States of America		
<b>Address Line 1*</b> 998877 Legal Way		
<b>City*</b> Montgomery		
<b>State*</b> Vermont	<b>Zip Code*</b> 54433	
<b>Phone</b> 876-555-1212		
<input checked="" type="checkbox"/> Make this contact Public		

Figure 1.3 – 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.

The screenshot displays a web application interface for legal filings. At the top, there are navigation tabs: FILINGS, BOOKMARKS, TEMPLATES, and SERVICE CONTACTS. Below these are search filters: My Firm (dropdown), All Statuses (dropdown), All Locations (dropdown), From Date (calendar icon), To Date (calendar icon), Case or Envelope (dropdown), Filter, and Export. The main content area shows three case entries, each with a title, a brief description, and a table of filing details.

Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Judgment	EFileAndServe	Judg	EFS
Accepted	Affidavit and Order for Dismissal	EFile	Power of Atty	DJE 1/1
Rejected	Amended Petition	EFileAndServe	amended pet	1/3 EFS
Rejected	Notice of Withdrawal of Counsel	EFile	notice of withdrawal of counsel	2/3 EFO

Figure 1.4 – 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.

The screenshot shows a web interface with a navigation bar at the top containing four tabs: '1 Case Information', '2 Parties', '3 Filings', and '4 Summary'. Below the navigation bar is a section titled 'Enter the Details for the New Case' with a help icon (question mark) on the right. A note states 'Required fields are bold and have an asterisk (\*)'. The form contains several fields: 'Select Location\*' (dropdown), 'Select Category\*' (dropdown with a red 'Required Field' error message), 'Select Case Type\*' (dropdown), 'Short Title' (text input with a help icon), 'Filing Attorney\*' (dropdown), and 'Payment Account\*' (dropdown). At the bottom left is an 'Exit' button and at the bottom right is a 'Parties' button.

Figure 1.5 – 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.

This close-up shows a text input field labeled 'Zip\*' containing the value '654656'. The field is outlined in red. To the right of the field is a red button with the text 'Invalid Zip Code'.

Figure 1.6 – Invalid Entry Error Message

# CHAPTER 2 E-FILING OVERVIEW

## TOPICS COVERED IN THIS CHAPTER

### ◆ FILING QUEUE STATUS

This section describes the e-filing process.

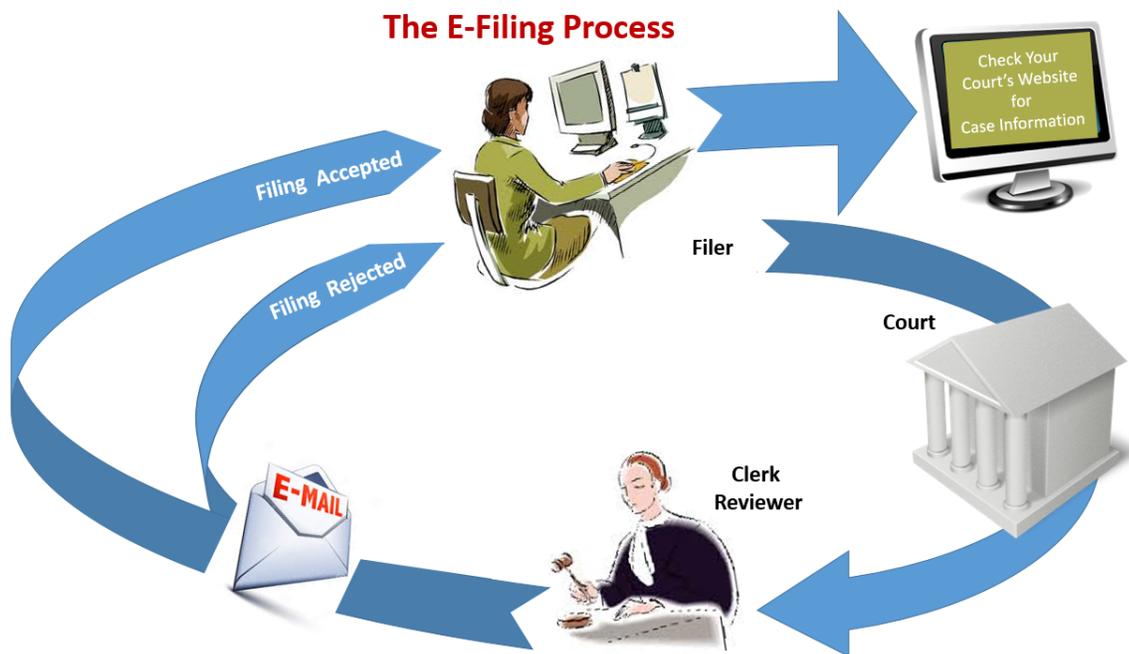


Figure 2.1 – The E-filing Process

Once a user has registered to use 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.

## 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.
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. <b>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.</b>
Received	EFO, EFS	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, then the document is routed to the judge for review and signing.
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

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Status	Filing Type	Definition
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 3 FILE & SERVE HOME PAGE

## TOPICS COVERED IN THIS CHAPTER

- ◆ LOGGING IN
- ◆ RESETTING YOUR PASSWORD

The File & Serve home page serves as the gateway to the File & Serve 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.

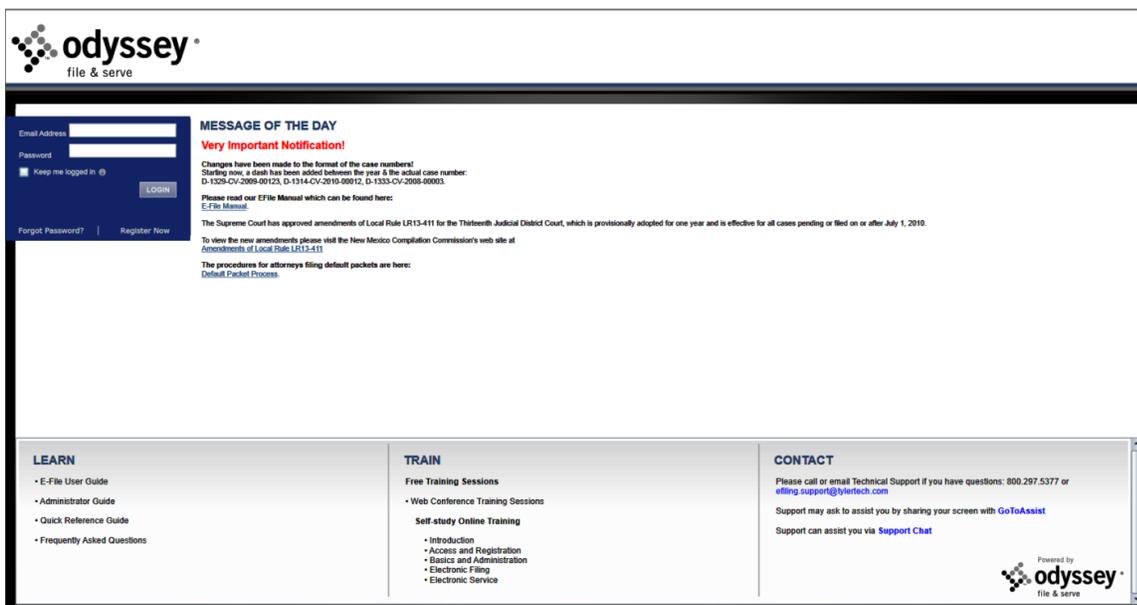


Figure 3.1 – File & Serve Home Page

## 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 File & Serve system. Users can log in to File & Serve by entering their email address and passwords.

## Register Now

The **Register Now** link takes you to the page where you can register users in the system using their name and contact information. File & Serve requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

## Learn

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

- The **E-File User Guide** provides step-by-step instructions on using the File & Serve 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 **Administrator Guide** is specifically for the Firm Administrator. This guides covers administrative functions such as registering the firm; managing user, payment, and attorney accounts; and creating and editing the firm's contact lists.
- The **Quick Reference Guide (QRG)** provides only the steps needed to complete common File & Serve tasks such as registering as a user with an existing firm, logging in to 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 File & Serve functionality.

## Train

File & Serve offers free, regularly scheduled online training for File & Serve. 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](mailto:efiling.support@tylertech.com) or by using the [File & Serve Chat](#) option.

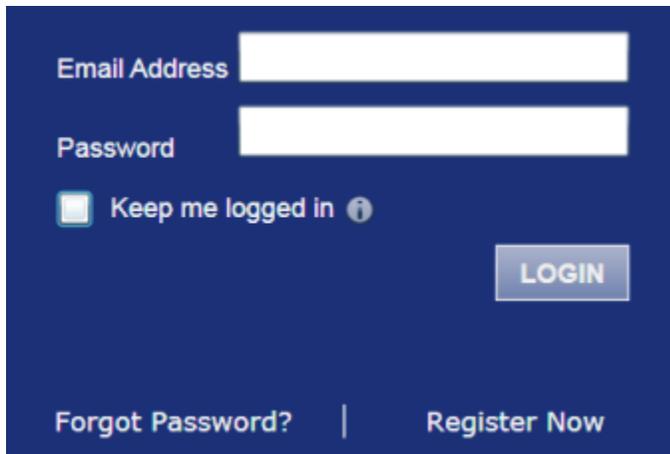
# LOGGING IN

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.



The image shows a login form on a dark blue background. It includes two white input fields for 'Email Address' and 'Password'. Below the password field is a checkbox labeled 'Keep me logged in' with an information icon to its right. A light blue 'LOGIN' button is positioned to the right of the checkbox. At the bottom, there are two links: 'Forgot Password?' and 'Register Now', separated by a vertical line.

Figure 3.2 – 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, you can begin to e-file and e-serve.

## 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.

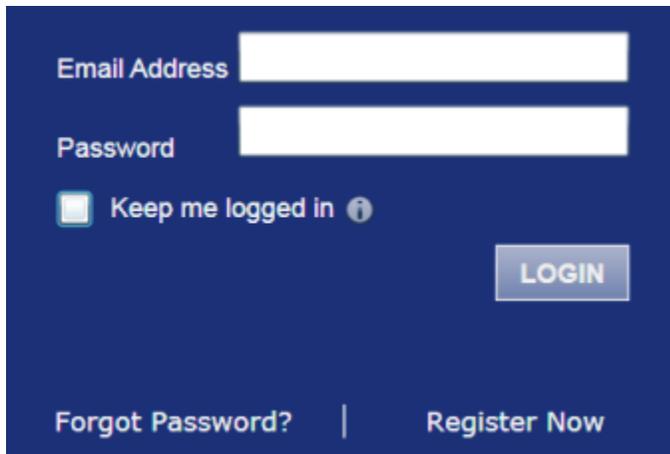
A dark blue login window with two white input fields for 'Email Address' and 'Password'. Below the password field is a checkbox labeled 'Keep me logged in' with an information icon. A 'LOGIN' button is positioned to the right of the password field. At the bottom, there are two links: 'Forgot Password?' and 'Register Now'.

Figure 3.3 – Login Window

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

The **Reset Password** window opens.

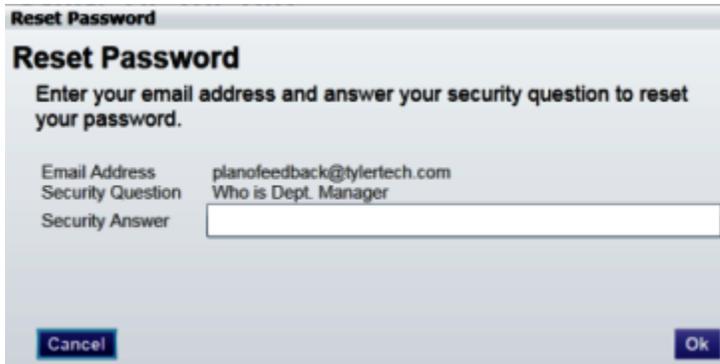
A light gray 'Reset Password' dialog box. The title is 'Reset Password'. Below the title is the instruction: 'Enter your email address and answer your security question to reset your password.' There is an 'Email Address' label followed by a text input field and a 'Next' button. At the bottom left is a 'Cancel' button and at the bottom right is an 'Ok' button.

Figure 3.4 – 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 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.



**Reset Password**

**Reset Password**

Enter your email address and answer your security question to reset your password.

Email Address planofeedback@tylertech.com  
Security Question Who is Dept. Manager  
Security Answer

Cancel Ok

Figure 3.5 – Reset Password – Security Answer

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@eFileTexas.gov.
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.**

# CHAPTER 4 CASE SEARCH

## TOPICS COVERED IN THIS CHAPTER

- ◆ SEARCHING FOR A CASE
- ◆ ADVANCED SEARCH
- ◆ PERFORMING AN ADVANCED SEARCH BY PERSON
- ◆ PERFORMING AN ADVANCED SEARCH BY BUSINESS

Search for a case by selecting a location, entering a case number or a party name.

## SEARCHING FOR A CASE

You can search for by selecting a location and then entering the case number or the party name in the search field.



Figure 4.1 – Case Search Option

Perform the following steps to search for a case:

1. Click the drop-down arrow to select a location.
2. Type the exact case number assigned by the court, or type the party's name in the search field.

No wildcards can be used in the search field.

3. Click the **Go** button.

The result screen displays the case meeting the criteria entered in the search field.



Case Number	Description	Actions
11-000131-CK	Brown, Jane v Black, Jane	  

Figure 4.2 – Case Search Results

4. Select an icon under the **Actions** column and perform actions as necessary, or click the **Close** button if you choose not to perform any further actions.

## ADVANCED SEARCH

The **Advanced Search** feature provides the ability to search by party name using a person's name or a business name. The **Advanced Search** feature includes the ability to filter a search by party name based on the location or the case type.

## PERFORMING AN ADVANCED SEARCH BY PERSON

Search for a case by selecting a location, entering a case number or a party name. The **Advanced Search** feature provides the ability to search by party name using a person's name. The **Advanced Search** feature includes the ability to filter a search by party name based on the location or the case type.

An asterisk (\*) indicates a required field. **Note: Color themes may vary by site.**

Complete the following steps to perform an **Advanced Search** using the **Person** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

The *Advanced Search* dialog box opens.

Figure 4.3 – Advanced Search Dialog Box

2. Select the **Person** check box.

**Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.**

3. Complete the fields in the *Advanced Search* dialog box.
4. Click the **Search** button to continue or the **Cancel** button to cancel. Click the **Reset** button to reset the form.

The search results are displayed.

# PERFORMING AN ADVANCED SEARCH BY BUSINESS

The Advanced Search feature provides the ability to search by party name using a business name.

An asterisk (\*) indicates a required field. **Note:** Color themes may vary by site.

Complete the following steps to perform an *Advanced Search* using the **Business** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

The *Advanced Search* dialog box opens.

Figure 4.4 – Advanced Search Dialog Box

2. Select the **Business** check box.

**Note:** Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.
4. Click the **Search** button to continue, or the **Cancel** button to cancel. Click the **Reset** button to reset the form.

The search results are displayed.

# CHAPTER 5 COURT ADMINISTRATION

## TOPICS COVERED IN THIS CHAPTER

### ◆ MANAGE NEW USERS

The **Court Administration** section allows the Court Administrator to approve or reject new users, manage court users, and modify user accounts.

## MANAGE NEW USERS

When a new user registers, the administrator receives notification to either approve or reject the request for an account if the **Require Administrator Approval of New User Registration** option is selected on the **Court Information** screen.

## FILTER NEW USERS OPTIONS

The Court Administrator can filter users by name, email address, and role assigned.

You must be a Court Administrator to perform this task.

**i Note: Features vary based on your system configuration.**

First Name	Last Name	Email	Role	Status
------------	-----------	-------	------	--------

Figure 5.1 – Filter New Users Options

1. Type the user name or email address, or select a role using the drop-down list.
2. Click **Filter**.

The court users meeting your criteria are displayed.

## APPROVING AND REJECTING NEW USERS

The Court Administrator approves or rejects new users for the firm. When a user registers for the system, the Firm Administrator receives notification a user has registered and has requested to be added to the firm.

Perform the following steps to accept or reject new users:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Approve New Users** tab.

Approve New Users for Your Court

<input checked="" type="checkbox"/>	First Name	Last Name ^	Email Address	Role	Status

Reject Approve

Cancel Changes Save Changes

Figure 5.2 – Approve New Users Tab

3. Select the user from the list to approve or reject.
4. Click the **Approve** button to approve the new user, or click the **Reject** button to reject the new user.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

# CHAPTER 6 MANAGE COURT USER ACCOUNTS

## TOPICS COVERED IN THIS CHAPTER

- ◆ FILTER COURT USERS OPTIONS
- ◆ ADDING COURT USER ACCOUNTS
- ◆ EDITING COURT USER ACCOUNTS
- ◆ DELETING COURT USER ACCOUNTS

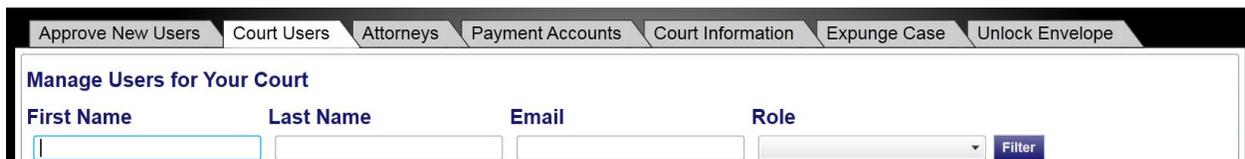
The Court Administrator is responsible for registering and approving new users, adding user accounts, resetting passwords, and activating and deactivating user accounts for the courts.

## FILTER COURT USERS OPTIONS

The Court Administrator can filter users by name, email address, and role assigned.

You must be a Court Administrator to perform this task.

**Note:** Features vary based on your system configuration.



The screenshot shows a web interface with a top navigation bar containing links: Approve New Users, Court Users, Attorneys, Payment Accounts, Court Information, Expunge Case, and Unlock Envelope. Below this is a section titled 'Manage Users for Your Court'. It features four input fields: 'First Name', 'Last Name', 'Email', and 'Role'. The 'Role' field is a dropdown menu. To the right of these fields is a blue 'Filter' button.

Figure 6.1 – Filter Court Users Options

1. Type the user name or email address, or select a role using the drop-down list.
2. Click **Filter**.

The court users meeting your criteria are displayed.

## ADDING COURT USER ACCOUNTS

A Court Administrator can add court user accounts.

**Note:** An asterisk (\*) indicates a required field.

Perform the following steps to add a new user account:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

First Name	Last Name ^	Email Address	Role	Status	
Sam	Addison	sam.add@tt.com	Filer, Firm Admin	Unverified	✕ ▲
Solomon	Atustuo	atustuo797@gmail.com	Filer	Active	✕
Thomas	Based	te.based@tylertech.com	Filer	Active	✕ ▼
John	Alloy	courts@times.com	Filer, Court Admin	Active	

**Add Court User**

First Name\*  Middle  Last Name\*

Email Address\*

**Roles**

Court Admin  Filer  Reviewer  Judicial Disposition Officer

Attorney

[Reset Password](#)

Figure 6.2 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Click the **Add Court User** button.
4. Complete the **Add Court User** form.
5. Assign a new court user role.

## Roles

Court Admin  Filer  Reviewer  Judicial Disposition Officer

Attorney

Figure 6.3 – Court User Roles

- a. Select the  **Court Admin** check box to assign the Court Administrator role to the new user.
  - b. Select  **Filer** check box to assign the Filer role to the new court user.
  - c. Select the  **Reviewer** check box to assign the Reviewer role to the new user.
  - d. Select the  **Judicial Disposition Officer** check box to assign the Judicial Disposition Officer role to the new user.
  - e. Select the  **Attorney** check box to assign the Attorney role to the new user.
6. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

The new user information is displayed at the top of the screen.

## EDITING COURT USER ACCOUNTS

The Court Administrator can edit court user accounts.

Perform the following steps to edit the court user account information:

1. Select the **Court Admin** link on the top menu.

The **Court Administrator** function screen opens.

First Name	Last Name ^	Email Address	Role	Status	
Sam	Addison	sam.add@tt.com	Filer, Firm Admin	Unverified	✕
Solomon	Atustuo	atustuo797@gmail.com	Filer	Active	✕
Thomas	Based	te.based@tylertech.com	Filer	Active	✕
John	Alloy	courts@times.com	Filer, Court Admin	Active	✕

**Add Court User**

First Name\*  Middle  Last Name\*

Email Address\*

**Roles**

Court Admin  Filer  Reviewer  Judicial Disposition Officer

Attorney

[Reset Password](#)

Figure 6.4 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Select the court user you want to edit from the list.
4. Edit the information in the form.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

## DELETING COURT USER ACCOUNTS

The Court Administrator can delete user accounts.

Perform the following steps to delete a court user account:

1. Select the **COURT ADMIN** link on the top menu.

The **Court Administrator** function screen opens.

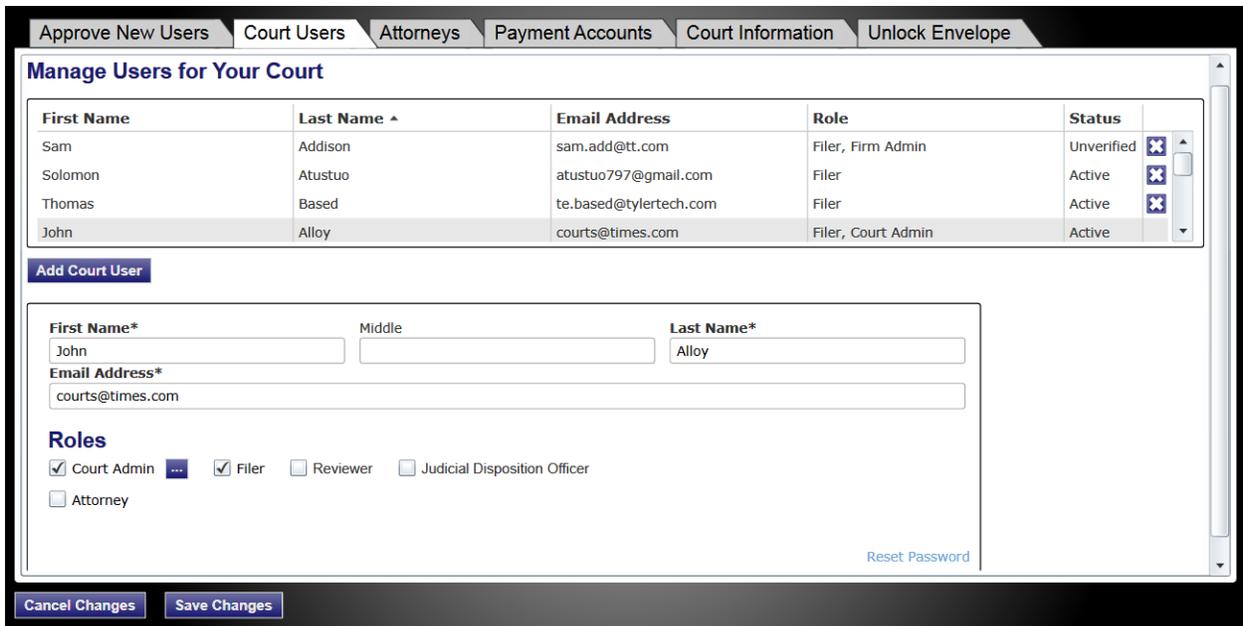


Figure 6.5 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Select the court user to delete on the list.
4. Click the  button to delete the user from the list.
5. Click the  button to save the changes and continue, or click the  button to cancel any changes made.

# CHAPTER 7 MANAGE COURT ATTORNEY ACCOUNTS

## TOPICS COVERED IN THIS CHAPTER

- ◆ ADDING COURT ATTORNEY ACCOUNTS
- ◆ EDITING COURT ATTORNEY ACCOUNTS
- ◆ DELETING COURT ATTORNEY ACCOUNTS

The Court Administrator is responsible for managing attorney accounts for the courts.

## ADDING COURT ATTORNEY ACCOUNTS

The Court Administrator can add attorneys to the court's user accounts or the attorney list.

Perform the following steps to add an attorney to the attorney list:

1. Click the [COURT ADMIN](#) link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Attorneys** tab.

Approve New Users | Court Users | **Attorneys** | Payment Accounts | Court Information | Unlock Envelope

### Manage Attorneys for Your Court

First Name	Last Name ^	Attorney Number	
Falworth	Dixon	55656	✕
Jackson	Hughes	33636	✕

**Add Attorney**

**First Name\*** Jackson **Middle** **Last Name\*** Hughes

**Attorney Number\*** 33636

Save Attorney as Court User

**Roles**

Court Admin  Filer

**Email Address\*** jhughes@hughlawfirm.com

**Cancel Changes** **Save Changes**

Figure 7.1 – Manage Court Attorneys Screen

3. Click the **Add Attorney** button.

**Note:** An asterisk (\*) indicates a required field.

4. Enter the attorney's first and last name in the fields provided.
5. Enter the attorney number in the **Attorney Number** field.

**Attorney Number\*** 

Figure 7.2 – Attorney Number Field

6. Click the  button to verify the attorney number is correct and registered with the court.

The **Verify Attorney Information** window opens and loads the attorney information registered with the court.



The window titled "Verify Attorney Information" displays the following text:

Verifying attorney number: 32123

Loading...

Please verify that your name appears correctly above. If the name is not correct, check that you entered the correct attorney number or contact the court to verify your attorney registration.

Is this information correct?

Figure 7.3 – Verify Attorney Information Window

**Note:** If the attorney information is incorrect, select the  button to correct the information. This takes you back to the Attorney tab.

7. Select the  **Save Attorney as Court User** check box to save the attorney as a court user (optional).
8. Assign the court attorney roles.

**Roles**

Court Admin     Filer

Figure 7.4 – Court User Roles

- a. Select  **Court Admin** to assign the Court Administrator role to the new attorney.
  - b. Select  **Filer** to assign the Filer role to the new attorney.
9. Type the attorney's e-mail address.

**Email Address\***

je@macafee.com

Figure 7.5 – E-mail Address Field

10. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

## EDITING COURT ATTORNEY ACCOUNTS

The Court Administrator can edit the attorney's information using the **Attorneys** screen.

Perform the following steps to edit the information entered for each attorney:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Attorneys** tab.

**Manage Attorneys for Your Court**

First Name	Last Name ^	Attorney Number
Falworth	Dixson	55656
Jackson	Hughes	33636

**Add Attorney**

**First Name\*** Jackson    **Middle**    **Last Name\*** Hughes  
**Attorney Number\*** 33636  
 Save Attorney as Court User  
**Roles**  
 Court Admin     Filer  
**Email Address\*** jhughes@hughlawfirm.com

**Cancel Changes**    **Save Changes**

Figure 7.6 – Manage Court Attorneys Screen

3. Select the attorney you want to edit from the list.
4. Edit the information in the form.

**Note:** An asterisk (\*) indicates a required field.

5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

# DELETING COURT ATTORNEY ACCOUNTS

The Court Administrator can delete an attorney's account using the **Attorneys** screen.

Perform the following steps to delete an attorney account:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Attorneys** tab.

**Manage Attorneys for Your Court**

First Name	Last Name ^	Attorney Number	
Falworth	Dixson	55656	X
Jackson	Hughes	33636	X

**Add Attorney**

**First Name\*** 
**Middle** 
**Last Name\***

**Attorney Number\***

Save Attorney as Court User

**Roles**  
 Court Admin  Filer

**Email Address\***

Figure 7.7 – Manage Court Attorneys Screen

3. Select the attorney you want to delete from the list.
4. Click the **X** button next to the attorney's name to delete the attorney from the list.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

# CHAPTER 8 MANAGE COURT PAYMENT ACCOUNTS

## TOPICS COVERED IN THIS CHAPTER

- ◆ ADDING COURT PAYMENT ACCOUNTS
- ◆ EDITING COURT PAYMENT ACCOUNTS
- ◆ DELETING COURT PAYMENT ACCOUNTS

The Court Administrator is responsible for managing payment accounts for vendor and statutory filing fees. Courts can have multiple payment accounts if needed. Credit cards and waivers are both valid forms of payment for vendor and statutory fees.

## ADDING COURT PAYMENT ACCOUNTS

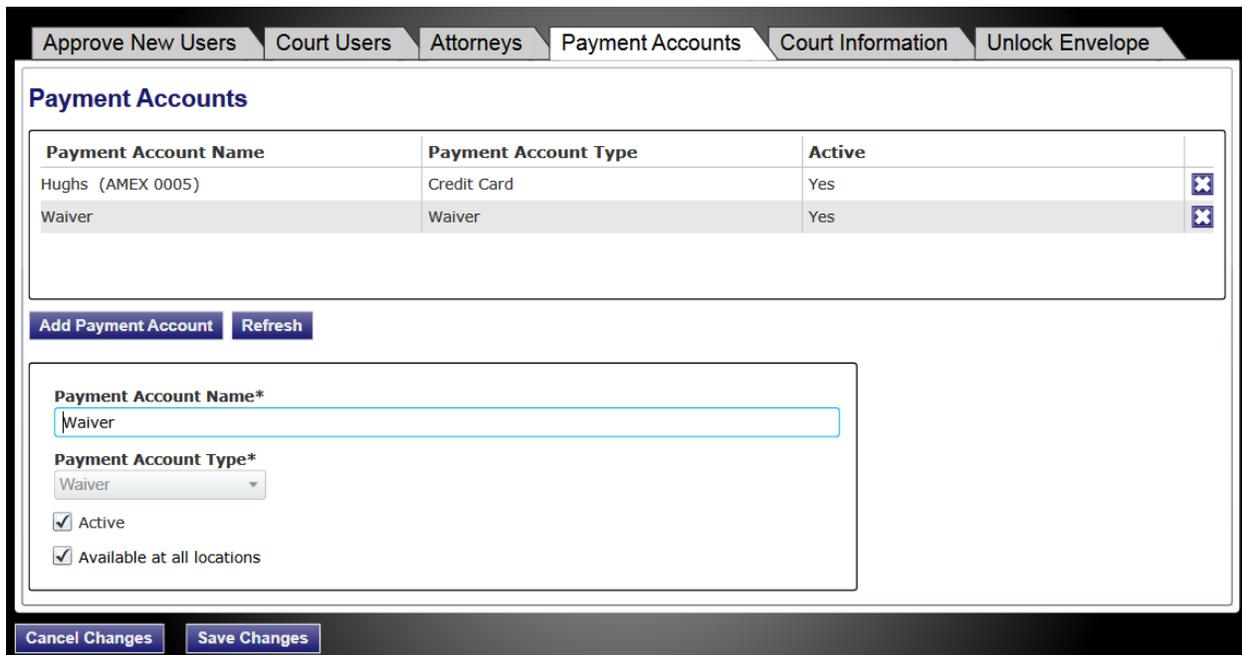
All courts are required to have a payment account in order to file electronically. The Court Administrator adds payment accounts for the courts.

Perform the following steps to add a payment account for your court:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Payment Accounts** tab.



The screenshot shows the 'Payment Accounts' tab selected in the 'COURT ADMIN' menu. The interface displays a table of existing payment accounts and a form to add a new one.

Payment Account Name	Payment Account Type	Active	
Hughs (AMEX 0005)	Credit Card	Yes	
Waiver	Waiver	Yes	

Buttons: **Add Payment Account**, **Refresh**

Form fields:

- Payment Account Name\***:
- Payment Account Type\***:
- Active
- Available at all locations

Buttons: **Cancel Changes**, **Save Changes**

Figure 8.1 – Payment Accounts Tab Selected

3. Click the **Add Payment Account** button.

4. Complete the **Add Payment Account** form.
  - a. Type a payment account name.
  - b. Select a payment account type (credit card, draw down, or waiver) using the drop-down list.

Figure 8.2 – Payment Account Drop-Down List

- c. Select **Credit Card** if the payment account is a credit card.
- d. Click the **Enter Credit Card Information** button to enter your credit card information.
 

**Note:** You are re-directed to a secure payment processing site to enter your credit card information.
- e. Select **Draw Down** if the payment account is a draw-down account.
- f. Click the **Enter Draw Down Information** button to select a draw-down account.

The **Draw Down** selection window opens.

Figure 8.3 – Draw Down Selection Window

- g. Select a draw-down account using the drop down list.
- h. Select **Waiver** if the payment account is a waiver.

- Click the **Save Changes** button to save the changes and continue, or click the **Cancel** button to cancel any changes made.

The payment account information is displayed at the top of the screen.

## EDITING COURT PAYMENT ACCOUNTS

After a payment account has been entered, only the payment account name and the payment account type can be changed. You cannot edit credit card information after it has been entered. Instead, delete the payment account, and add a new one.

Perform the following steps to edit a payment account for your court:

- Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

- Select the **Payment Accounts** tab.

Payment Account Name	Payment Account Type	Active	
Hughs (AMEX 0005)	Credit Card	Yes	X
Waiver	Waiver	Yes	X

**Add Payment Account** **Refresh**

**Payment Account Name\***  
Waiver

**Payment Account Type\***  
Waiver

Active

Available at all locations

**Cancel Changes** **Save Changes**

**Figure 8.4 – Payment Accounts Tab Selected**

- Select the court payment account you want to edit from the list.
- Edit the payment account name or type in the form.
- Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

# DELETING COURT PAYMENT ACCOUNTS

The Court Administrator is responsible for deleting payments accounts. Perform the following steps to delete a payment account for your court:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Payment Accounts** tab.

Payment Account Name	Payment Account Type	Active	
Hughs (AMEX 0005)	Credit Card	Yes	X
Waiver	Waiver	Yes	X

**Payment Account Name\***

**Payment Account Type\***

Active  
 Available at all locations

**Figure 8.5 – Payment Accounts Tab Selected**

3. Select the firm payment account to delete from the list.
4. Click the button next to the name in the list to delete the payment account..
5. Click the  button to save the changes and continue, or click the  button to cancel any changes made.

The payment account information is deleted in the table at the top of the screen.

# CHAPTER 9 MANAGE COURT INFORMATION

## TOPICS COVERED IN THIS CHAPTER

### ◆ UPDATING COURT INFORMATION

The Court Administrator uses the **Court Information** tab to update the contact information for the courts (name, address, phone number). The Court Administrator can also use the **Court Information** tab to manage the registration process by maintaining the authority to register new users or allowing users to self register.

## UPDATING COURT INFORMATION

Use the **Court Information** form to update your court's contact information, change how a new user registers to use the system, allow the users to self-register, or change the approval process.

Perform the following steps to update court information:

1. Click the [COURT ADMIN](#) link on the top menu on the home page.

The *Court Information* screens opens.

2. Select the **Court Information** tab.

The screenshot shows a web application interface for managing court information. At the top, there is a navigation menu with tabs: 'Approve New Users', 'Court Users', 'Attorneys', 'Payment Accounts', and 'Court Information'. The 'Court Information' tab is selected. Below the menu is a form titled 'Court Information' with a help icon (question mark) in the top right corner. The form contains the following fields:

- Name\***: Hamburg County Courthouse
- Country\***: United States of America (dropdown menu)
- Address Line 1\***: 1234 Smith Avenue
- City\***: Scyene
- State\***: Texas (dropdown menu)
- Zip Code\***: 79902
- Phone Number\***: 987-345-4323

Below the form is a section titled 'New User Registration' with two checkboxes:

- Allow Users to Self Register
- Require Administrator Approval of New User Registration

At the bottom of the form are two buttons: 'Cancel Changes' and 'Save Changes'.

Figure 9.1 – Court Information Tab

3. Update the *Court Information* form as needed.

4. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

The information entered here updates the court's information on the **Court Information** screen and opens the **Filings** screen.

# CHAPTER 10 EXPUNGING A CASE

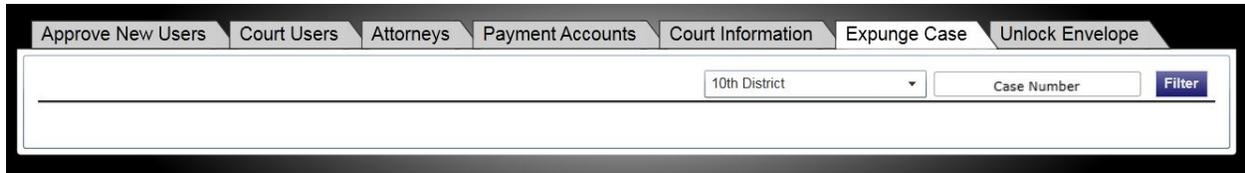
The Court Administrator can expunge cases that should be removed from the court record.

You must have Court Administrator rights to perform this action.

Perform the following steps to expunge a case:

1. Click the [COURT ADMIN](#) link on the top menu on the home page.

The **Court Administrator** function screen opens.



**Figure 10 .1 – Expunge Case Tab Selected**

2. Select the **Expunge Case** tab.
3. Select a location using the drop-down list.
4. Type a case number in the *Case Number* field.
5. Click the Filter button.
6. Select the **Expunge Cases** action.
7. Confirm that you want to expunge the list of cases.

# CHAPTER 11 UNLOCKING THE ENVELOPE

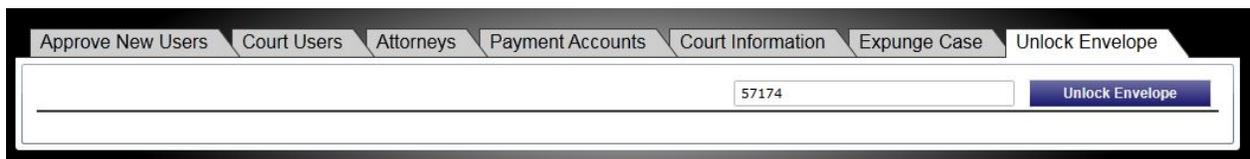
The Court Administrator can unlock an envelope that has been locked by another administrator working the case..

You must have court administrator rights to perform this action.

Perform the following steps to unlock the envelope:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.



**Figure 11 .1 – Unlock Envelope Tab Selected**

2. Select the **Unlock Envelope** tab.
3. Type a case number in the blank field.
4. Click the **Unlock Envelope** button.

The *Envelope Unlocked* window appears displaying the *Envelope successfully unlocked* message.

5. Click the **Ok** button to close the window and to continue working.



# Technical Support Contact Information

For assistance, contact technical support through the following resources.

Resource	Contact Information
Support Hours	7 a.m. to 9 p.m. (CT), Monday through Friday
Support Chat	Assistance is also available online through <a href="#">Support Chat</a> .
E-mail	<a href="mailto:support@efiletexas.gov">support@efiletexas.gov</a>
Telephone	855.839.3453
Go To Assist (Support)	Support may ask to assist you by sharing your screen using <a href="#">GoToAssist</a> .