



Odyssey File & Serve™

Review Queue User Guide – Release 3.13

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CHAPTER 1 RELEASE 3.13 NEW FEATURES

The following are new features for Release 3.13.

Note: Features vary based on your system configuration. Contact your Tyler representative for system configuration requests.

Disable Filings on a Per-User Basis

The courts can now disable filings on a per-user basis.

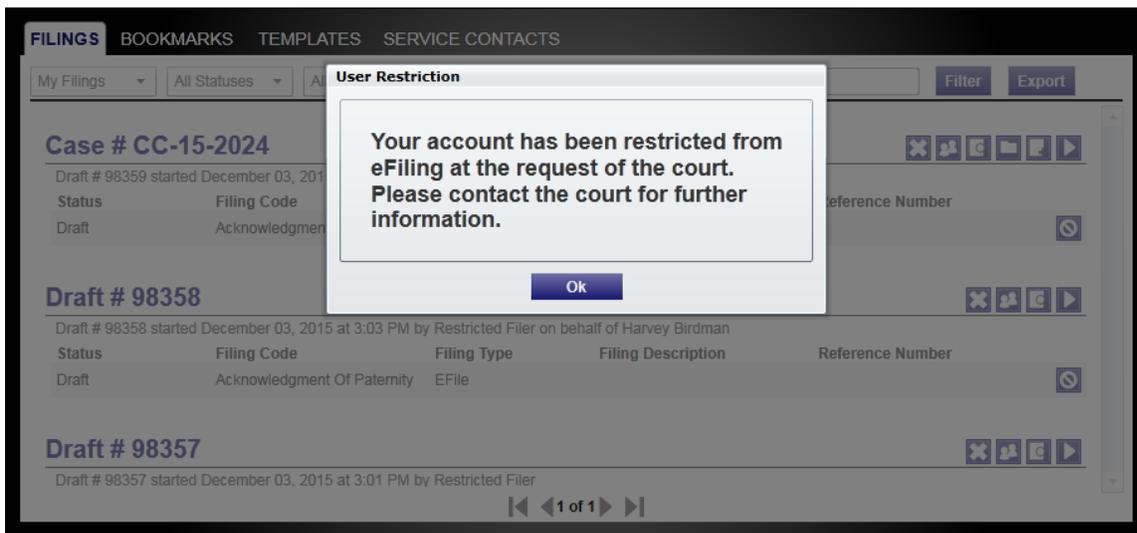


Figure 1.1 – User Restriction Window

Note: No other functionality is impaired when this feature is used. A filer can view past filings as well as manage service contacts, account, and firm information (if applicable). The User Restriction message that is displayed is specific to the user and the situation that led to the restriction. The restriction may be imposed by the court or by Tyler Technologies.

Charge Fees Per Party Type

Courts can now charge a fee for each party that is added to a case.

For each new party added, a fee is assessed on the envelope where the party is added.

Note: Party fee rules are configured by node, case type, and party type. For each new party that matches this combination, a fee is assessed on the envelope where the party is added. The court fees are transferred to the case management system (CMS) after the envelope is marked Accepted. All fees are assessed to or paid by the party that is responsible for the fees, regardless of the party they were linked to.

Prevent Users from Adding New Parties on Subsequent Filings

The courts can now prevent users from adding new parties on subsequent filings.

Multiple Attorneys on a Filing

Filers can now select additional attorneys on a filing.

i Note: Lead Attorneys have the (L) designation.

Lead Attorney
Lionel Hutz

Add Additional Attorneys

Annie Wright
 Diana Shutter
 Harvey Birdman
 Kim Lakers

Suffix

Figure 1.2 – Add Additional Attorneys

i Note: If a case already exists in the case management system, the option to remove the assigned lead attorney is disabled.

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.

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 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.

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

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.

The screenshot shows 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 (checkbox), Filter (button), and Export (button). The main content area displays 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 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.

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 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.

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 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.

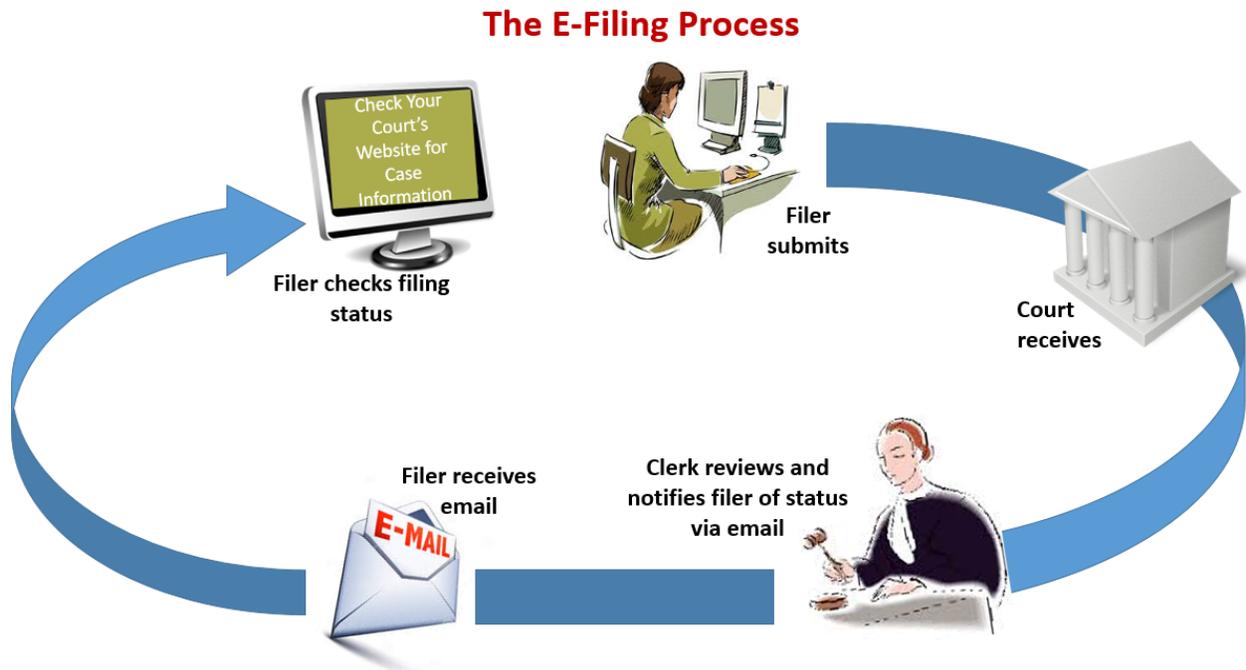


Figure 3.1 – The E-filing Process

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, rejects or returns the filing.

If the clerk accepts the filing, the case is docketed and set to appear in the clerk's case management system. An 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 returned or rejected, the envelope is sent back to the filer with a reason 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.

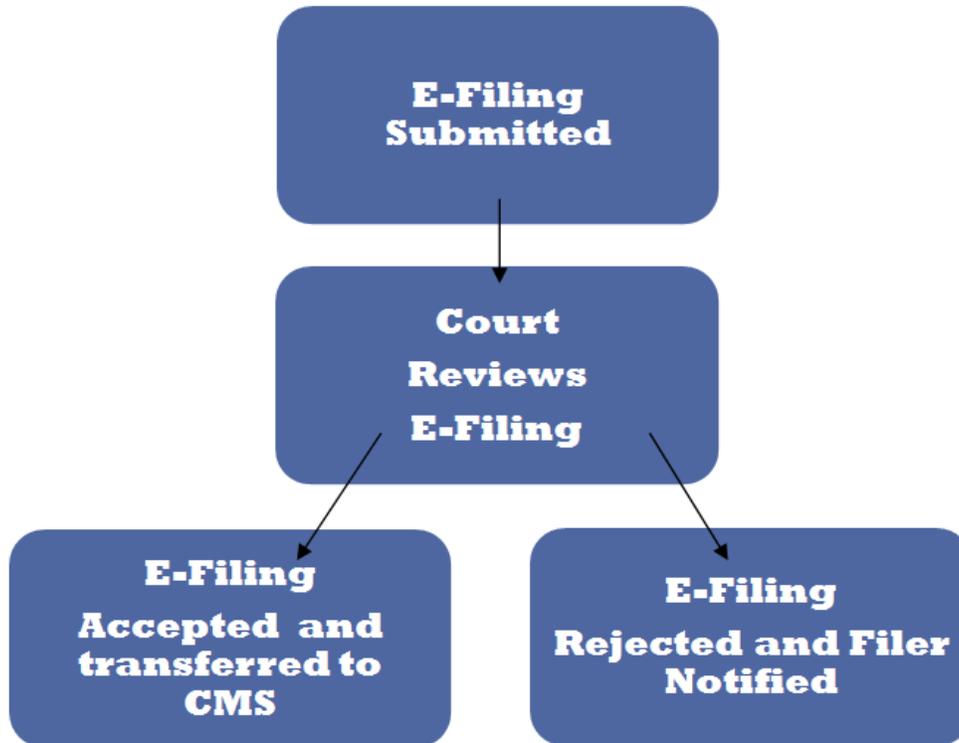


Figure 3.2 – Understanding the Review Queue Data Flow

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.
Returned	EFO, EFS	Reviewer has reviewed filing and returned the filing as additional action needs to be taken by the filer. Note: Filer can cancel or copy a filing in Returned status.
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.

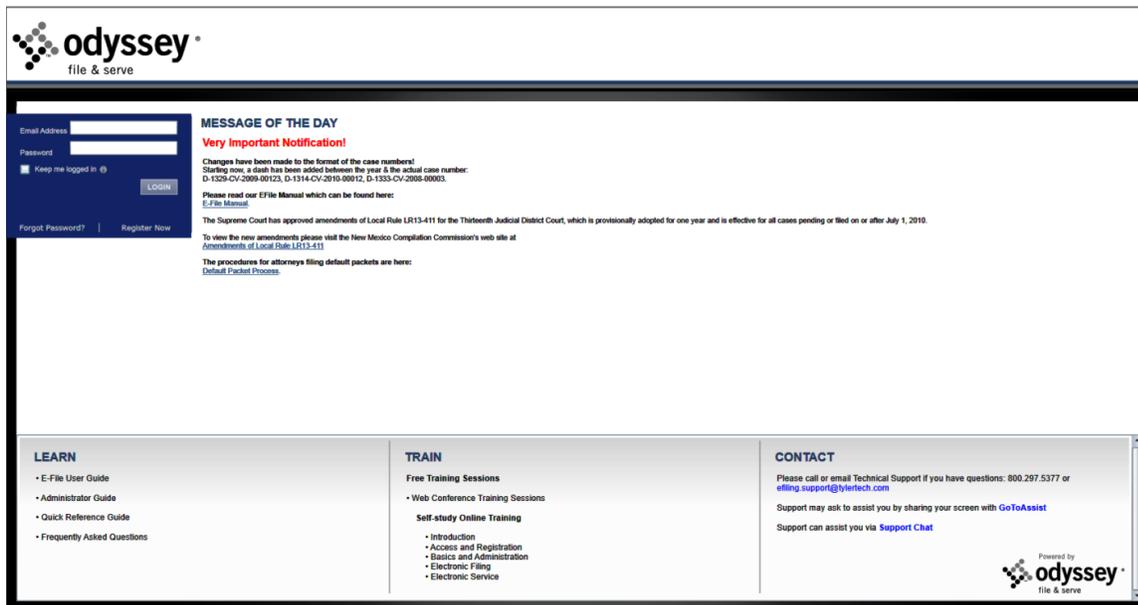


Figure 4.1 – File & Serve Home Page

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 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 are 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
- ◆ MY ACCOUNT
- ◆ MANAGING EMAIL NOTIFICATIONS
- ◆ MANAGING REVIEWER PREFERENCES

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.

i 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.

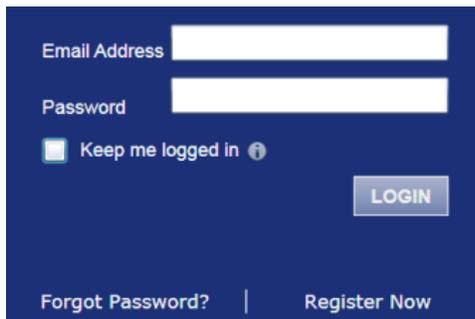


Figure 5.1 – Login Window

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.
i Note: There is no fee to sign up for the product.
i 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?)

Security Question*

Figure 5.2 – Security Question Field

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

Security Answer*

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.

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.
- i 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.

i 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.

i 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

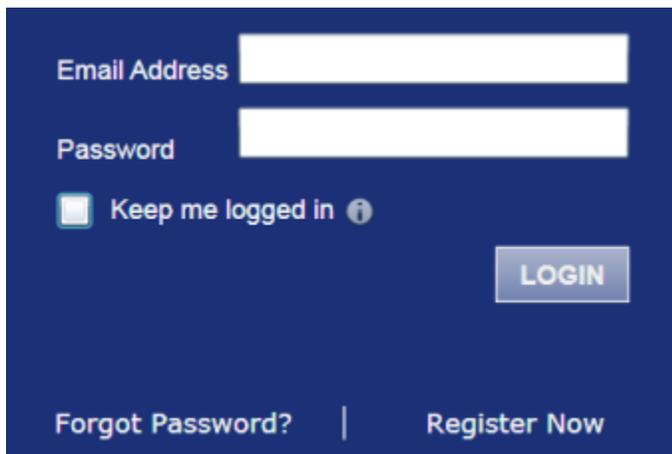
You can log in by using your e-mail address and password provided during the registration process. You must log in to be able to e-file or e-serve.

i 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.



The screenshot shows a dark blue login form. At the top, there is an information icon followed by the text 'Note: This actions takes you to the reviewer queue.' Below this, the form contains two input fields: 'Email Address' and 'Password'. Under the password field is a checkbox labeled 'Keep me logged in' with an information icon to its right. A 'LOGIN' button is positioned to the right of the checkbox. At the bottom of the form, there are two links: 'Forgot Password?' and 'Register Now', separated by a vertical line.

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.

The screenshot shows a web interface with three tabs: "Change Password", "Manage Notifications", and "Reviewer Preferences". The "Reviewer Preferences" tab is active. Below the tabs, the heading "Review Queue Preferences:" is followed by the question "After completing an envelope in the Review Tool, what action would you like to take?". There are two radio button options: "Open the next Envelope." (which is selected) and "Return to the Review Queue". At the bottom of the form are "Cancel" and "Save" buttons.

Figure 5.9 – Review Queue Preference Tab

CHANGING THE USER PASSWORD

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

The screenshot shows the "Login - Change Password" screen. It has two tabs: "Change Password" (active) and "Manage Notifications". The form contains the following fields: "Old Password*", "New Password*", "Re-enter New Password*", "Security Question*" (with "number of kids" entered), and "Security Answer". At the bottom are "Cancel" and "Save" buttons.

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.

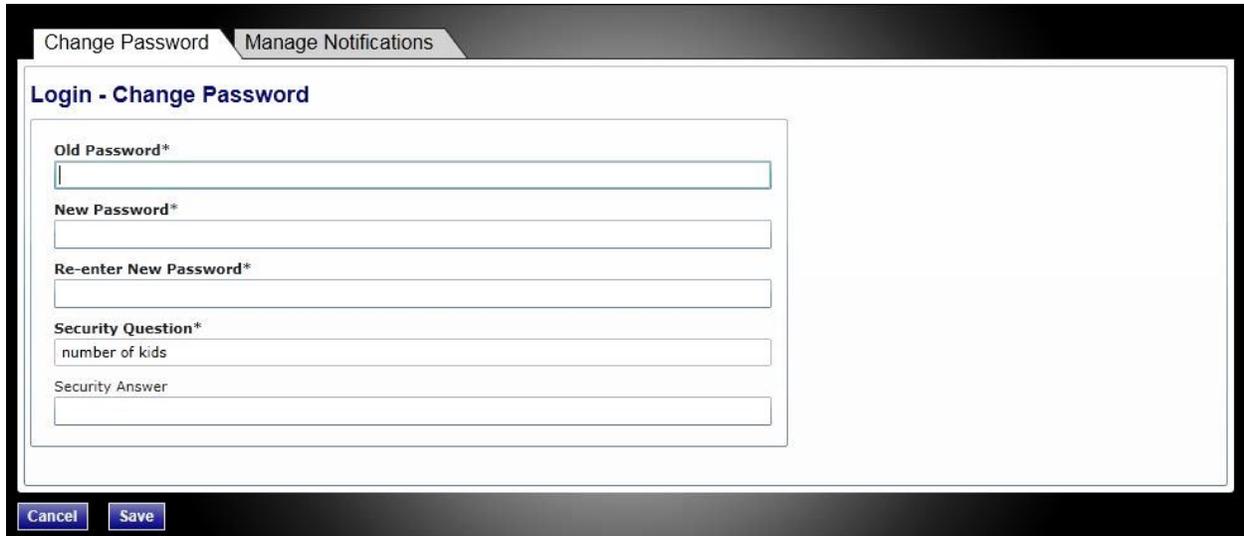
2. Complete the **Login – Change Password** form by entering your account information.

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.



The screenshot shows a web interface with two tabs: 'Change Password' (selected) and 'Manage Notifications'. Below the tabs is a form titled 'Login - Change Password'. The form contains five input fields: 'Old Password*', 'New Password*', 'Re-enter New Password*', 'Security Question*' (with the text 'number of kids' entered), and 'Security Answer'. At the bottom of the form are two buttons: 'Cancel' and 'Save'.

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.

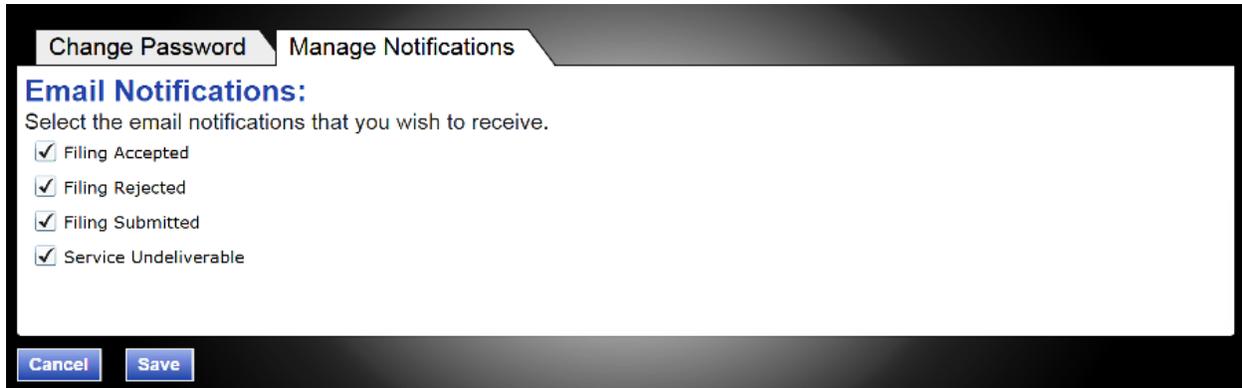


Figure 5.12 – Manage Notifications Screen

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.

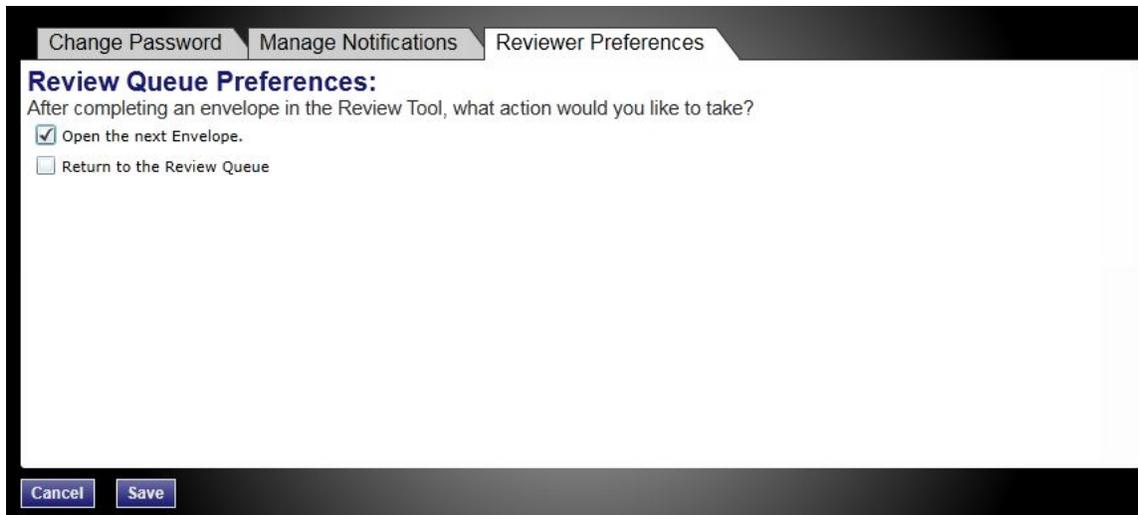
Perform the following steps to access the Review Queue:

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



Figure 5.13 – Workspace Toolbar

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



The screenshot shows a web interface with three tabs: "Change Password", "Manage Notifications", and "Reviewer Preferences". The "Reviewer Preferences" tab is active. Below the tabs, the heading "Review Queue Preferences:" is displayed. Underneath, a question asks, "After completing an envelope in the Review Tool, what action would you like to take?". There are two radio button options: "Open the next Envelope." (which is selected) and "Return to the Review Queue". At the bottom of the form, there are two buttons: "Cancel" and "Save".

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 CASE SEARCH

TOPICS COVERED IN THIS CHAPTER

◆ ADVANCED SEARCH

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

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.

Advanced Search

Search by Party Name

Location* All Locations

Person Business

First Name*

Middle Name

Last Name*

Case Type* All Case Types

Show Results Sorted by* Case Number

Reset Cancel Search

Figure 6.1 – 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.

- Complete the fields in the *Advanced Search* dialog box.
- 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:

- 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 6.2 – Advanced Search Dialog Box

- 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.

- Complete the fields in the *Advanced Search* dialog box.
- 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 7 ACCESSING THE REVIEW QUEUE

TOPICS COVERED IN THIS CHAPTER

- ◆ FILTERING THE REVIEW QUEUE
- ◆ SAVING DEFAULT FILTERS

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 [WORKSPACE](#) link at the top of the page.



Figure 7.1 – Workspace Toolbar

2. Click the [REVIEW QUEUE](#) link on the toolbar.

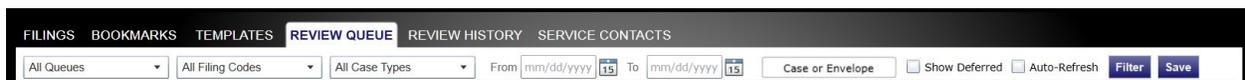


Figure 7.2 – Review Queue Selected

The **Review Queue** window opens.

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

FILINGS BOOKMARKS TEMPLATES **REVIEW QUEUE** REVIEW HISTORY SERVICE

From Date To Date Auto-Refresh

Envelope # 282 filed October 02, 2012 at 2:50 PM by System System on behalf of The Hammer

Status	Filing Code	Case Type	Filing Descript	Queue	Reviewer
Under F	ACCEPTANCE	Administrative: .	a	Default	

Envelope # 304 - a  

Envelope # 304 filed October 17, 2012 at 2:28 PM by System System on behalf of The Hammer

Status	Filing Code	Case Type	Filing Descript	Queue	Reviewer
Under F	ADDENDUM	Name Change	aa	Default	System System

Case # D-1329-CV-2012-00032 - In The Matter Of Th  

Envelope # 306 filed October 17, 2012 at 2:51 PM by System System on behalf of The Hammer

Status	Filing Code	Case Type	Filing Descript	Queue	Reviewer
Under F	ADJUDICATED	Name Change	a	Errored filings	

Case # D-1329-CV-2012-00032 - In The Matter Of Th  

Envelope # 307 filed October 17, 2012 at 3:38 PM by System System on behalf of The Hammer

Status	Filing Code	Case Type	Filing Descript	Queue	Reviewer
Submitt	ACCEPTANCE	Name Change	asdf	Default	

Envelope # 310 - a  

Envelope # 310 filed October 18, 2012 at 10:55 AM by System System on behalf of The Hammer

Status	Filing Code	Case Type	Filing Descript	Queue	Reviewer
Under F	ACCEPTANCE	Name Change	a	Default	System System

◀◀ 1 of 12 ▶▶

Figure 7.3 – 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 26 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 7.4 – 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 7.5 – 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.

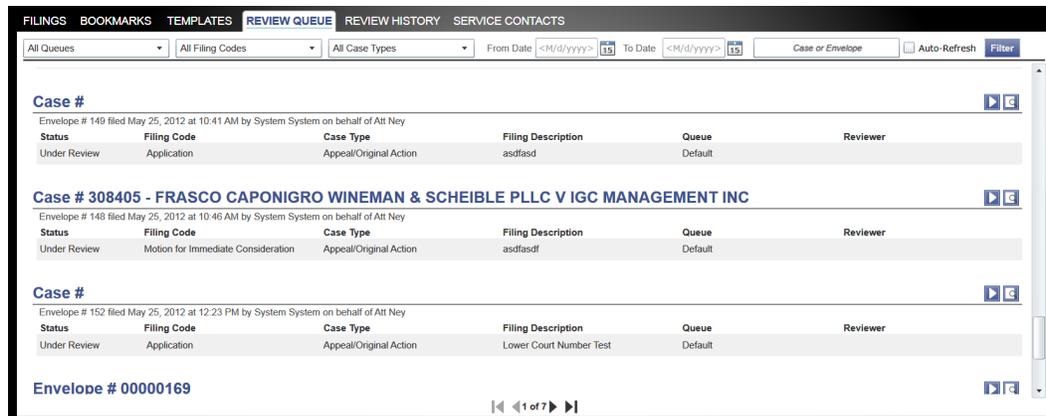


Figure 7.6 – Review Queue Screen

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 8 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.

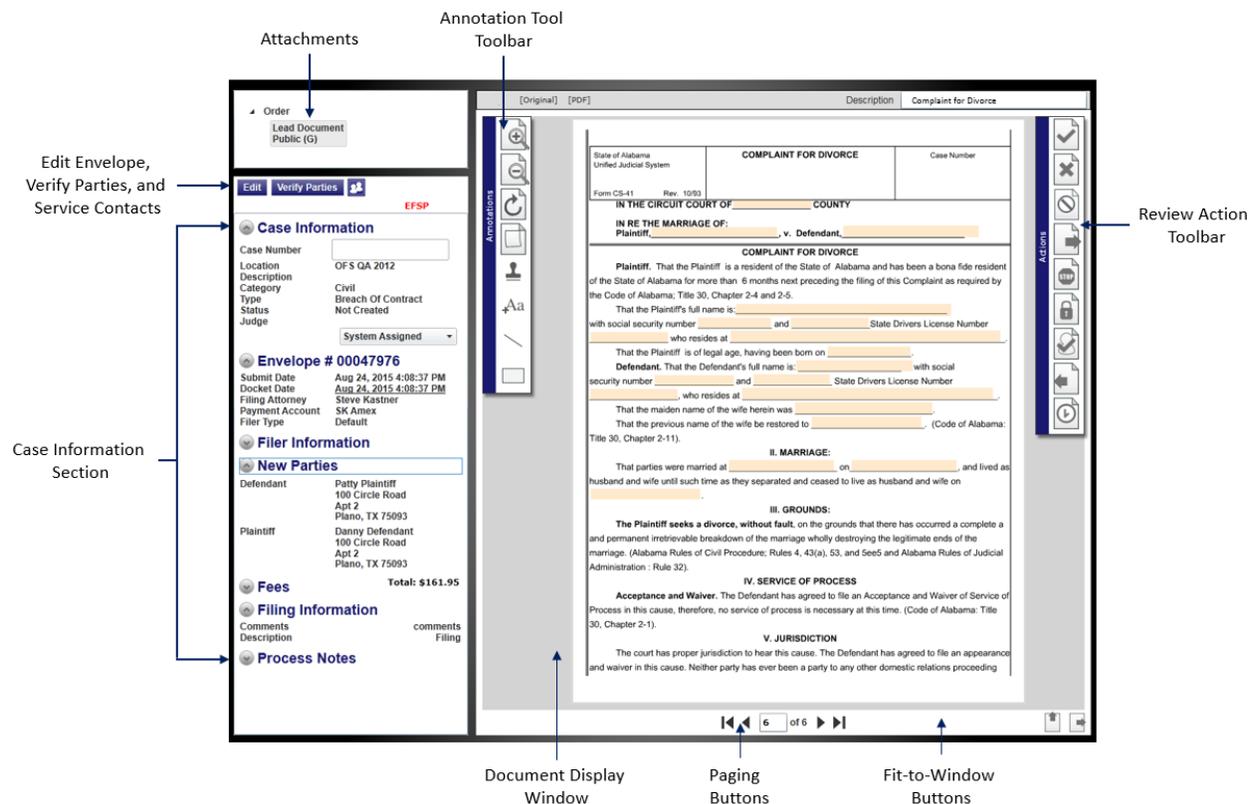


Figure 8.1 – Review Queue User Interface

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 9 REVIEW ENVELOPE AND FILING INFORMATION

TOPICS COVERED IN THIS CHAPTER

- ◆ ATTACHMENT SECTION
- ◆ EDIT ENVELOPE INFORMATION
- ◆ VERIFY PARTY INFORMATION
- ◆ VIEWING SERVICE CONTACTS HISTORY
- ◆ REVIEW CASE INFORMATION
- ◆ REVIEW ENVELOPE INFORMATION
- ◆ REVIEW FILER INFORMATION
- ◆ REVIEW ORIGINAL PARTIES
- ◆ FILING FEES
- ◆ REVIEW FILER COMMENTS
- ◆ REVIEW FILING INFORMATION
- ◆ REVIEW PROCESS NOTES

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.

✓ Action
Lead Document (Lead)

Edit Verify Parties Waiver

Case # CC-15-1597

Location	OFS QA 2012
Description	
Category	Civil
Type	Appeal
Status	Filed
Filed Date	4/22/2015 12:00:00 AM
Judge	

Envelope # 00000035

Submit Date	Apr 24, 2015 4:58:53 PM
Docket Date	<u>Apr 24, 2015 4:58:53 PM</u>
Filing Attorney	Steve Kastner
Payment Account	SK Waiver

Filer Information

Filed by	Samantha Washington
Filer Address	1328 Courts Way Canton, Texas 75024
Filer Phone	555-222-1112
Filer Email	swashington@courts.org
Firm Name	Law Firms of Texas

Original Parties

Fees	Total: \$0.00
Responsible Party	
Payment Service Fee	\$0.00
Total Court Case Fees	\$0.00
Total Court Filing Fees	\$0.00
Total Filing & E-File Fee	\$0.00
Grand Total	\$0.00

Filing Information

Process Notes

Figure 9.1 – 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 9.2 – 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.

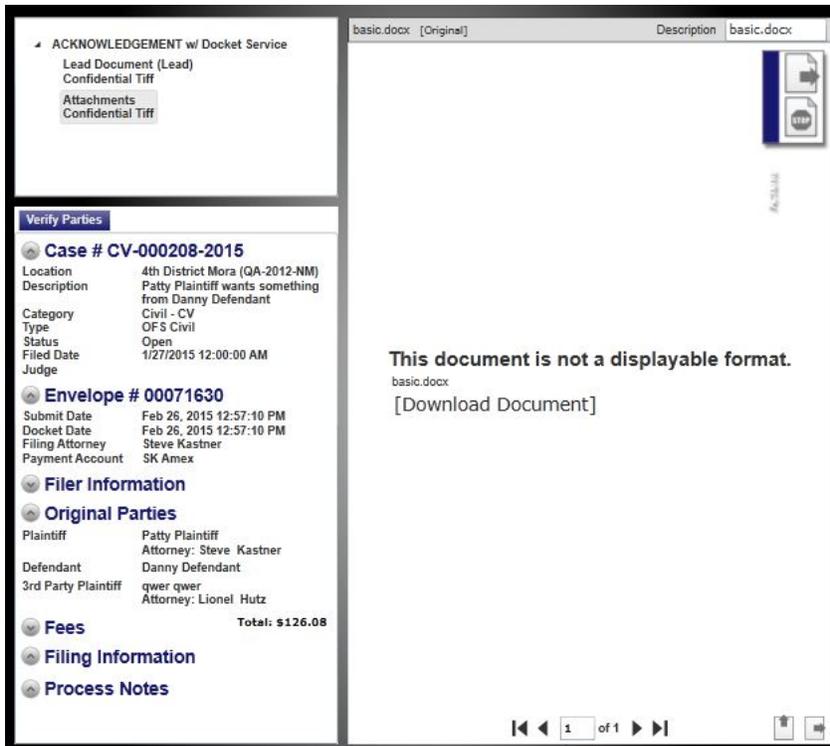


Figure 9.3 – Unsupported Document Type Notification

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

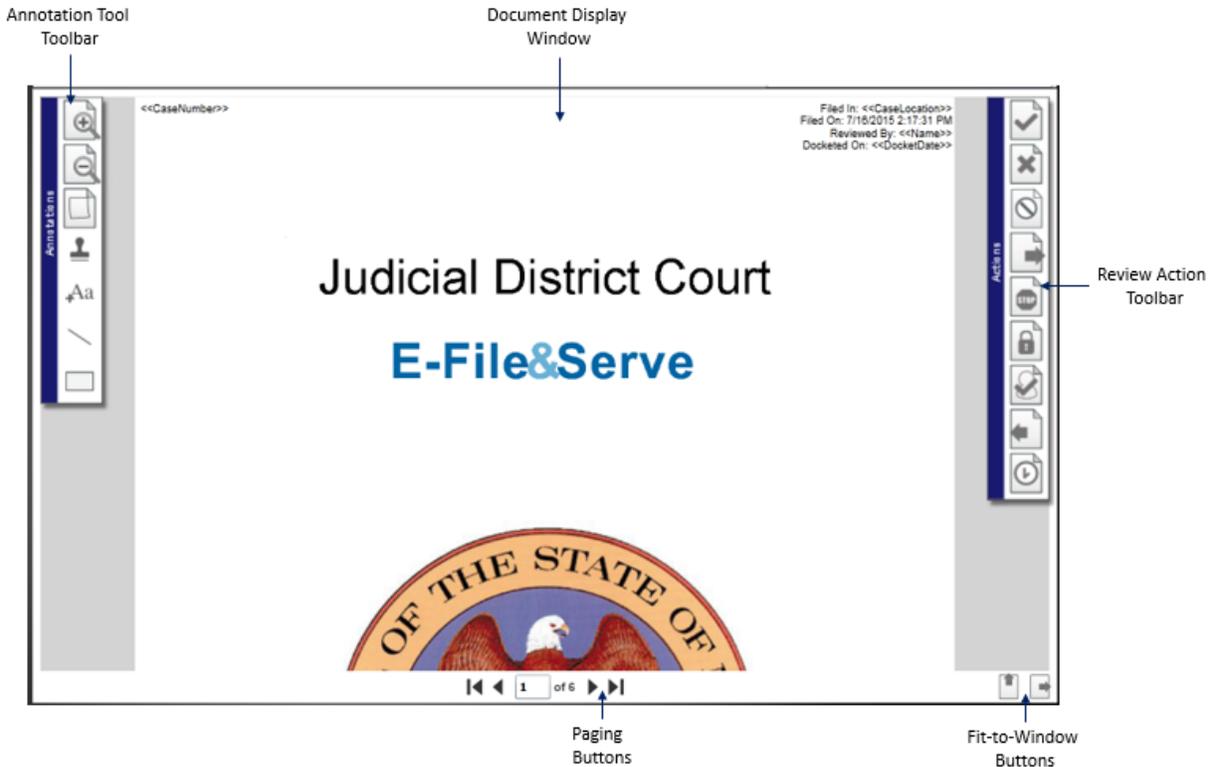


Figure 9.4 – Document Display Window

EDIT ENVELOPE INFORMATION

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



Figure 9.5 – 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 **X** 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.

ADDING NEW CASE PARTY ATTORNEYS

Reviewers now have the option to add a new case party attorney to the case. Perform the following steps to add a new case party attorney to a filing:

1. Log in as a reviewer.

Note: You must have reviewer privileges to access the Review queue.

The Review queue opens.

2. Locate the filing that you want to review.

3. Click  to review the filing.

The **Work Items** queue opens.

4. Click  to access the *Case Information* page.

5. Click  to access the *Edit Envelope* page.

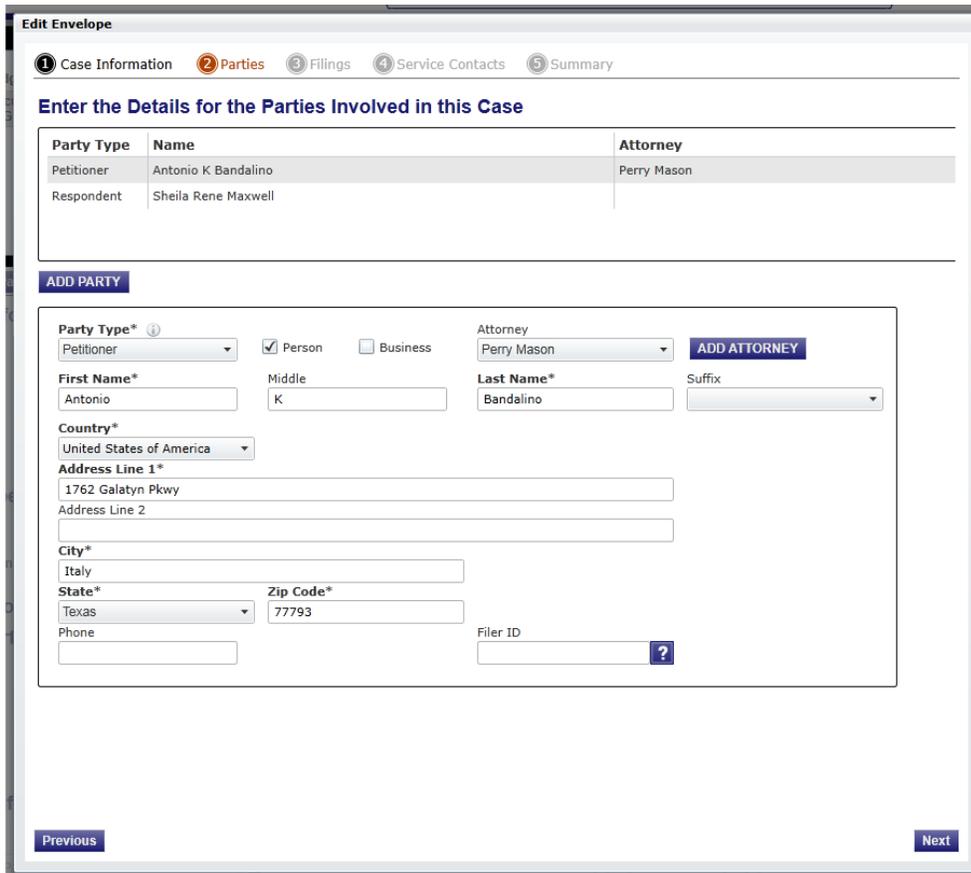


Figure 9.6 – Edit Envelope Page

6. Click  to add a new case party attorney to the filing.

The *Add an Attorney* dialog box opens.

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

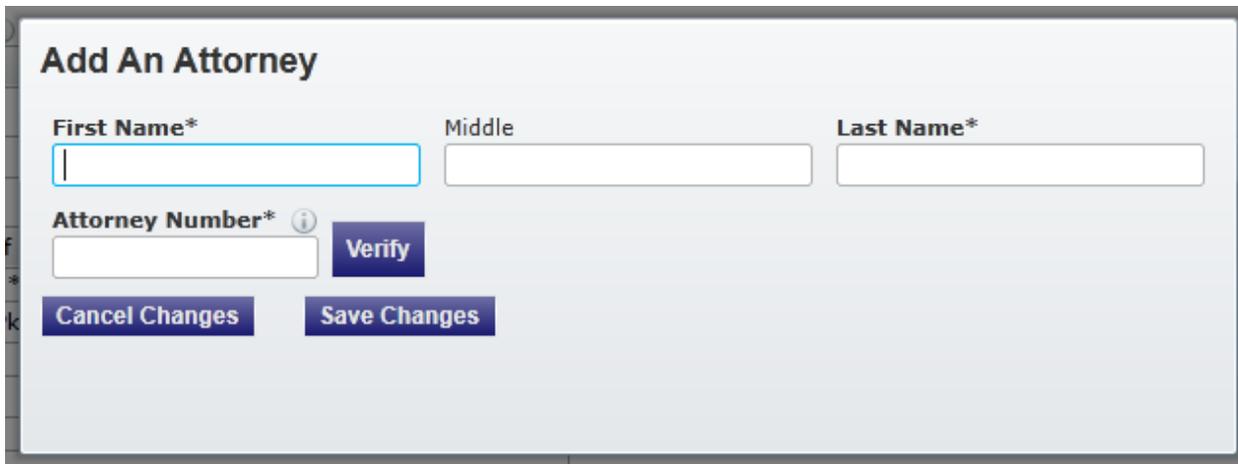


Figure 9.7 – Add an Attorney Dialog Box

7. Enter the attorney’s first and last name in the fields provided.
8. Enter the attorney number in the **Attorney Number** field.



Figure 9.8 – Attorney Number Field

9. Click the **Verify** 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.



Figure 9.9 – Verify Attorney Information Window

Note: If the attorney information is incorrect, select the **No** button to correct the information. This takes you back to the Attorney tab.

10. Assign the attorney roles.
11. Type the attorney’s e-mail address.

Email Address*

je@macafee.com

Figure 9.10 – E-mail Address Field

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

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.

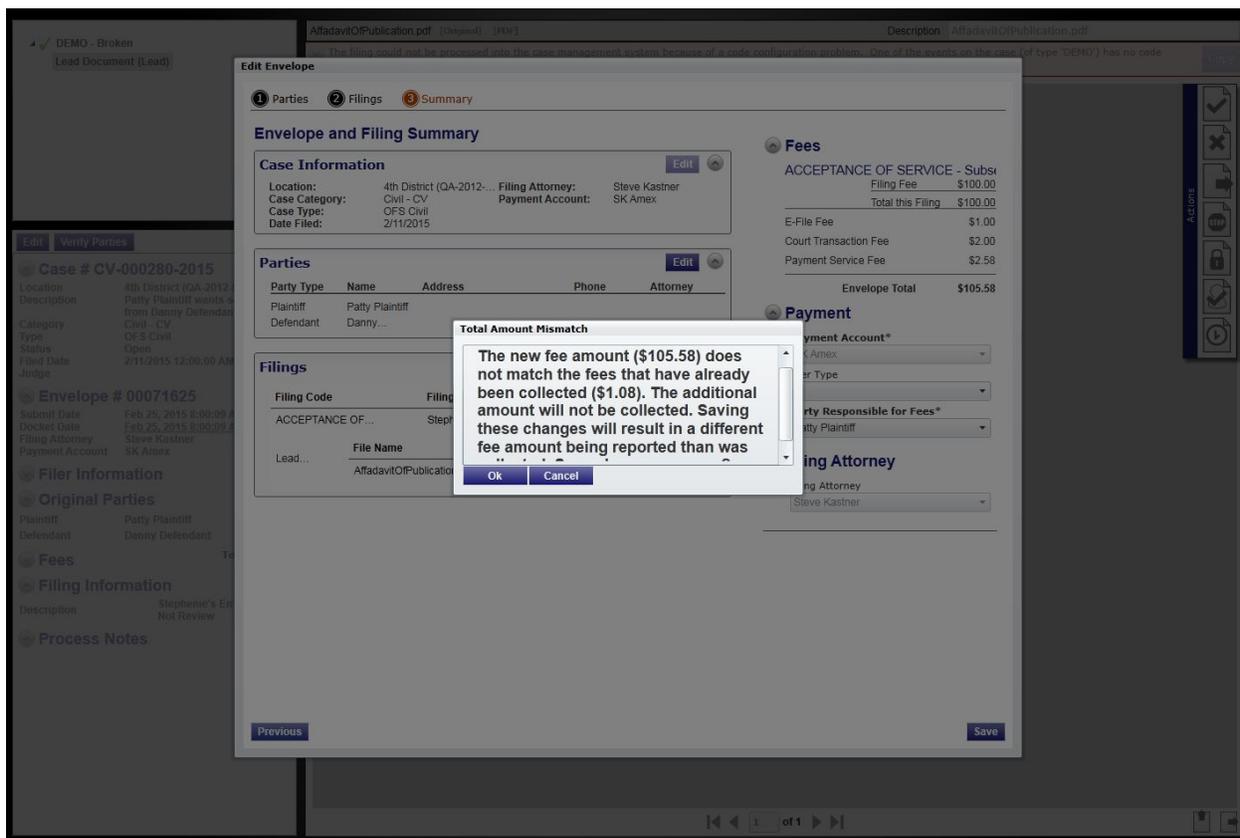


Figure 9.11 – Total Amount Mismatch Error Message

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.

Party Type	Name	Filer ID	Verified	Disposition
Appellant	Sue Young		No	
Defendent	Mark Jones		No	

Filer-Entered Party Information	Case Management System Party Information
First Name Sue Middle Name Last Name Young Address City, State, Zip Phone <small>*If you choose to use the information above, the Filer ID entered by the filer will NOT be used. The party information fields will be editable when the User Filer Info button is selected.</small>	Party Lookup by Filer ID <input type="text"/> <input type="button" value="Search"/> No filer id First Name Middle Name Last Name Address City, State, Zip Phone <small>*If you choose to use the information above, the party data that exists in the Case Management System will be used.</small>
<input type="button" value="Use Filer Info"/>	<input type="button" value="Use CMS Info"/>
<input type="button" value="Cancel"/>	<input type="button" value="Save"/>

Figure 9.12 – Verify Parties Window

For new cases, the party information can be edited by clicking the 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.

Filer-Entered Party Information

First Name Sue

Middle Name

Last Name Young

Address

City, State, Zip

Phone

*If you choose to use the information above, the Filer ID entered by the filer will NOT be used. The party information fields will be editable when the User Filer Info button is selected.

[Use Filer Info](#)

Figure 9.13 – 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.

Case Management System Party Information

Party Lookup by Filer ID [Search](#)

No filer id

First Name

Middle Name

Last Name

Address

City, State, Zip

Phone

*If you choose to use the information above, the party data that exists in the Case Management System will be used.

[Use CMS Info](#)

Figure 9.14 – 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.

- Click the  icon to view the service contact information.

This opens the **Service Contacts** tab.

Manage Case Service Contacts

Select Contacts to Receive Service for each Party

Defendant: adding test party party
Plaintiff: testing adding addtl party

Other Service Contacts

Jameson Aurther Westinghouse (jaw@rawitserlaw.com)	   
Adam Record (aefstest6@gmail.com)	   
Adam Smith (aefstest2@gmail.com)	   
New Service contact contact Testing (TestingContact1@tylertech.com)	   
s p (steven.pham@tylertech.com)	   
tamasha Anderson (Anderson@testingt.com)	   
Tamasha motor (tamashatest@gmail.com)	   
Tim Thompson (werwer@test.com)	   

First Name* Jameson **Middle** Aurther **Last Name*** Westinghouse
Email* jaw@rawitserlaw.com **Administrative Copy**  kathy@rawitserlaw.com **Firm Name** Rawitser Law Firm
Address 7977 E. Frankford Way **City** Mountain City
State Alaska **Zip Code** 112123
Phone  (xxx)xxx-xxxx
 Make this contact Public

Save Contact in My Firm Master Service List

Figure 9.15 – Service Contacts Tab

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

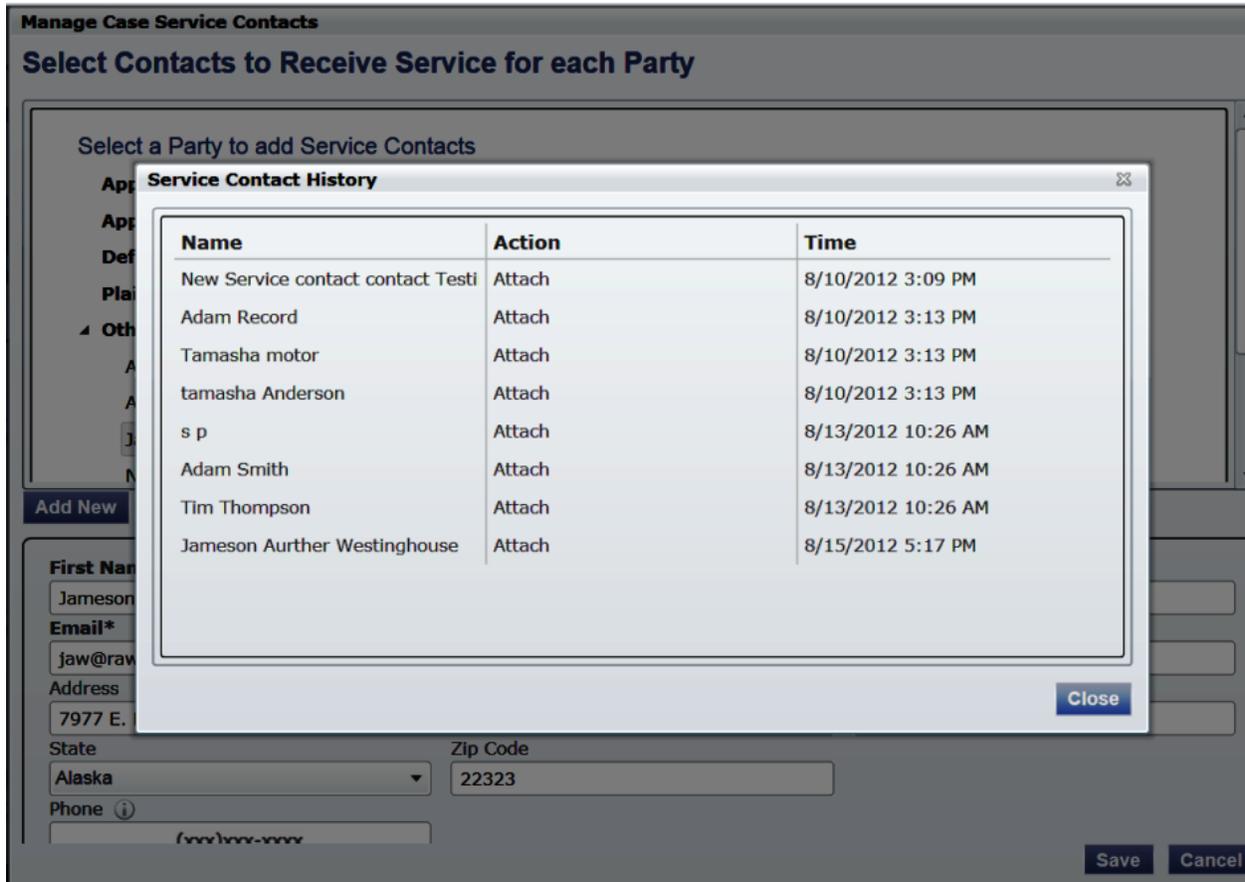


Figure 9.16 – View Service Contact History

- Click the **Close** to close the window and return to the service contacts page.

REVIEW CASE INFORMATION

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

Action
 Lead Document (Lead)

Edit Verify Parties Waiver

Case # CC-15-1597

Location OFS QA 2012
 Description
 Category Civil
 Type Appeal
 Status Filed
 Filed Date 4/22/2015 12:00:00 AM
 Judge

Envelope # 00000035

Submit Date Apr 24, 2015 4:58:53 PM
 Docket Date Apr 24, 2015 4:58:53 PM
 Filing Attorney Steve Kastner
 Payment Account SK Waiver

Filer Information

Filed by Samantha Washington
 Filer Address 1328 Courts Way
 Canton, Texas 75024
 Filer Phone 555-222-1112
 Filer Email swashington@courts.org
 Firm Name Law Firms of Texas

Original Parties

Fees **Total: \$0.00**

Responsible Party	
Payment Service Fee	\$0.00
Total Court Case Fees	\$0.00
Total Court Filing Fees	\$0.00
Total Filing & E-File Fee	\$0.00
Grand Total	\$0.00

Filing Information

Process Notes

Figure 9.17 – 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 41](#) 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 9.18 – Review Queue Selected

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

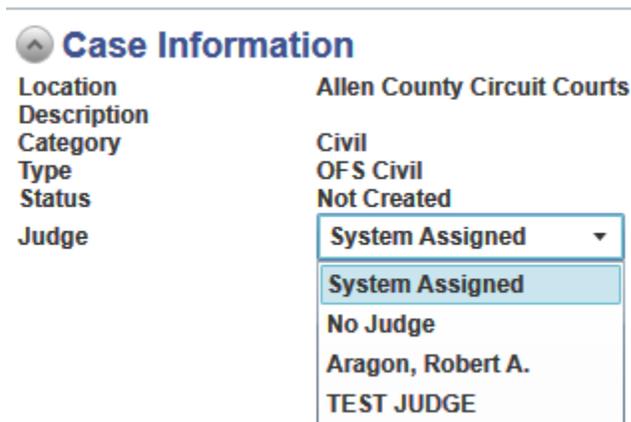


Figure 9.19 – Judge Selection Drop-down List

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.

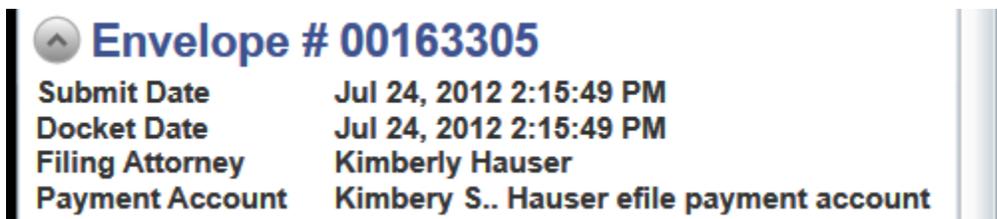


Figure 9.20 – Envelope Information Section

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.

Envelope # 00004537
 Submit Date **May 30, 2012 10:22:33 AM**
 Docket Date **May 30, 2012 10:22:33 AM**

5/30/2012 15 10:22:33 AM 

Filing Attorney
 Payment Account

Filer Information

Filed by
 Filer Address
 Filer Phone
 Filer Email:
 Firm Name

May, 2012						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

om

Figure 9.21 – 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.

<input type="button" value="^"/> Filer Information	
Filed by	Kimberly Hauser
Filer Address	2539 Country Village Court Ann Arbor Michigan 48103
Filer Phone	7349944750
Filer Email:	khauser3137@yahoo.com
Firm Name	Individual

Figure 9.22 – 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.

Filer Information	
Filed by	Kimberly Hauser
Filer Address	2539 Country Village Court Ann Arbor Michigan 48103
Filer Phone	7349944750
Filer Email:	khauser3137@yahoo.com
Firm Name	Individual

Figure 9.23 – 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 an 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.

Original Parties	
Plaintiff	Chevy Chase 19 Wisconsin Circle Chevy Chase, Maryland 20815 Attorney: Chevy Chase
Defendant	William James Murray Sr 23 Sunset Blvd Suite 32 Hollywood, California 78956 Attorney: William James Murray

Figure 9.24 – 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.

 Fees	
Responsible Party	Kimberly Hauser
Convenience Fee	\$16.00
Total Court Case Fees	\$0.00
Total Court Filing Fees	\$375.00
Total Filing & Service Fee	\$5.00
Grand Total	\$396.00

Figure 9.25 – 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 9.26 – 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 9.27 – 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.

i 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.

Process Notes

 **Reviewer 6/23/2015 at 12:23 PM**

The filer does not live in this county. DXK

Page: 1

**Filing Code: Acknowledgment Of Paternity
Lead Document -**

Figure 9.28 – Process Notes Section

CHAPTER 10 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 rotate a page, highlight text, or upload and apply images on documents using the image stamps.

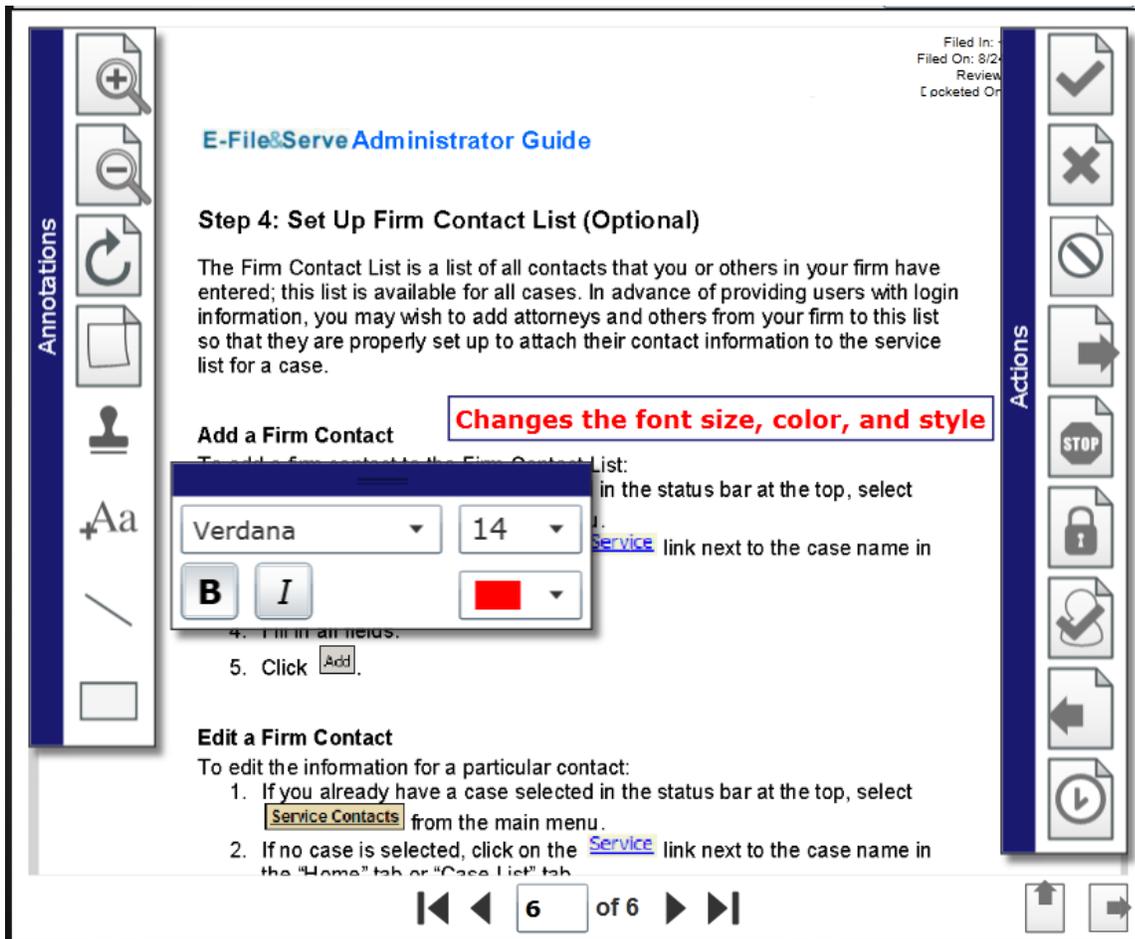


Figure 10.1 – Document Display Window with Annotations

Complete the following steps to add annotations:

1. Click 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.

2. Click  to rotate the current page 90 degrees clockwise.
3. 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.

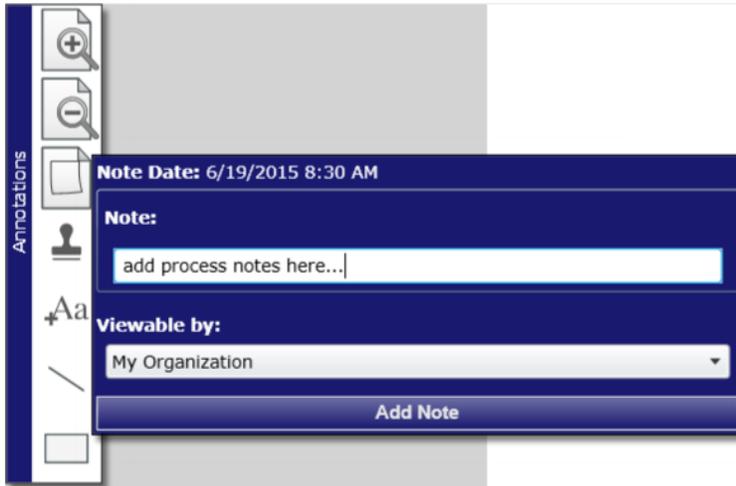


Figure 10.2 – Adding Process Notes

4. 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.

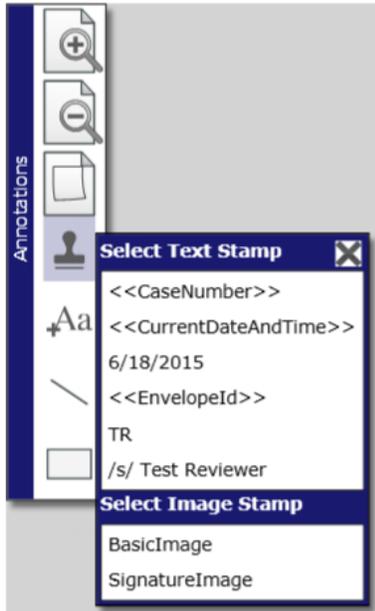


Figure 10.3 – Text and Image Stamps

- 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 action applies the stamp to the document.

5. 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 10.4 – Modifying Text Annotations

6. 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 10.5 – Modifying Line Annotations

7. 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 11 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 11.1 – Review Actions Toolbar

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

Accept Filing

Click the  icon to accept the filing.

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



Figure 11.2 – 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 11.3 – 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.

Fail Submission

Click the  icon to send a submission notification to the filer.

When a filer's submission fails, the reviewer can 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

Click the  icon to forward the filing to another queue.

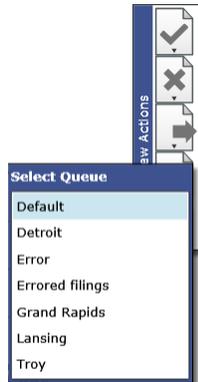


Figure 11.4 – Forward Filing Icon and Queue Selection Window

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 11.5 – 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.

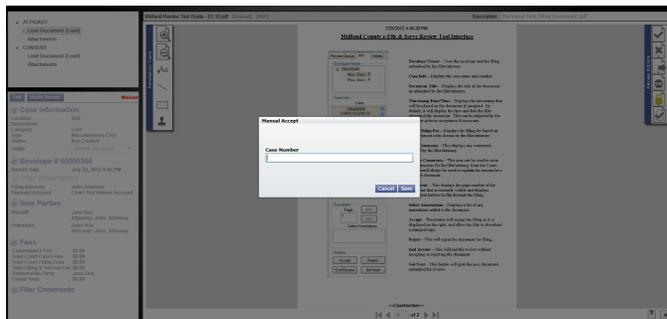


Figure 11.6 – Manually Accept Case Number Window

- 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.

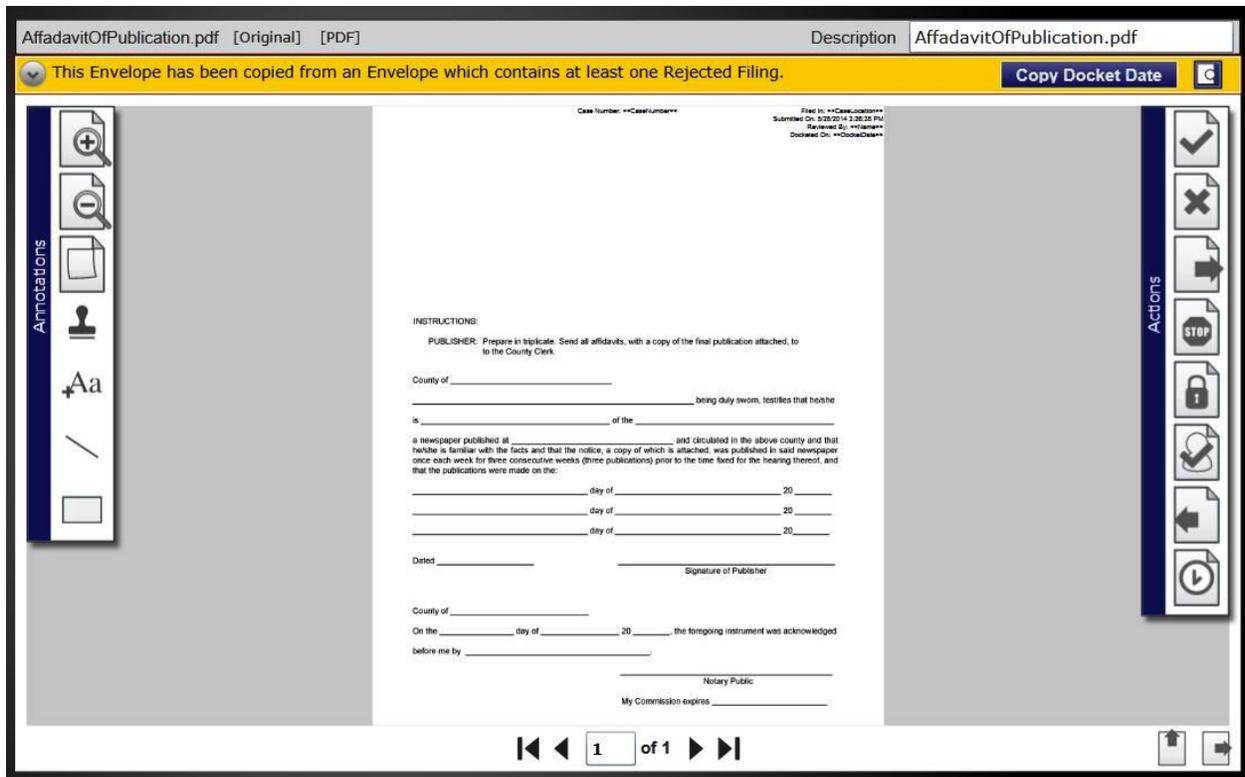


Figure 11.7 – Return for Resubmission Yellow Notice

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 12 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.

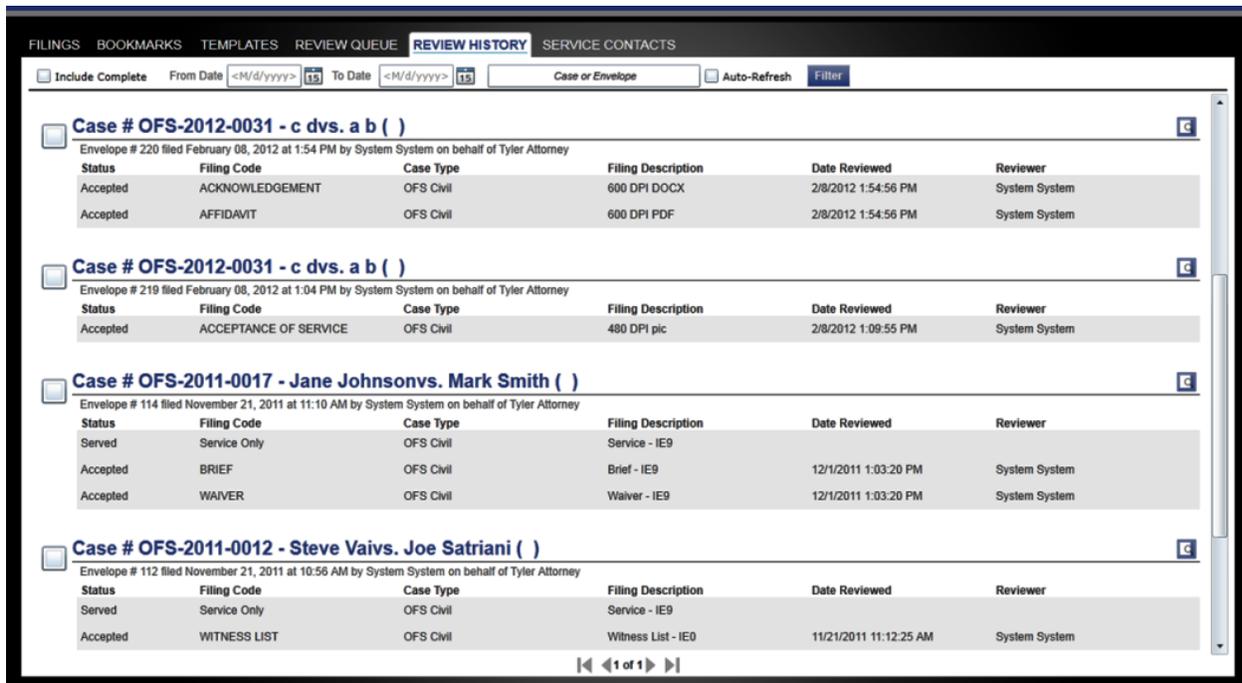


Figure 12.1 – Review History Window

Accessing the Review History

Click the **REVIEW HISTORY** 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.

The screenshot shows the 'REVIEW HISTORY' tab in a software interface. At the top, there are navigation tabs: FILINGS, BOOKMARKS, TEMPLATES, REVIEW QUEUE, REVIEW HISTORY (selected), and SERVICE CONTACTS. Below the tabs, there is a filter bar with the following elements: a checked 'Include Complete' checkbox, 'From Date' and 'To Date' input fields (both showing '15'), a 'Case or Envelope' search field, an unchecked 'Auto-Refresh' checkbox, and a 'Filter' button. The main content area displays two entries, each with a checked 'Include Complete' checkbox and a blue 'E' icon in the top right corner.

Envelope # 00163543
Envelope # 163543 filed August 15, 2012 at 3:16 PM by efling dev on behalf of Tamasha whittington

Status	Filing Code	Case Type	Filing Description	Date Reviewed	Reviewer
Accepted	Motion - Reconsideration - 7.215(i)	Appeal/Original Action	Additional parties added	8/15/2012 3:17:31 PM	efling dev

Envelope # 00163515
Envelope # 163515 filed August 14, 2012 at 2:32 PM by August Twothousandtwelve on behalf of Aust 14th Lawyer

Status	Filing Code	Case Type	Filing Description	Date Reviewed	Reviewer
Accepted	Defect Correction	Appeal/Original Action	August 14th	8/14/2012 3:30:48 PM	efling dev

Figure 12.2 – 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 am to 9 pm (CT), Monday through Friday
Odyssey File & Serve Support Chat	Assistance is also available online through Support Chat .
Odyssey File & Serve Email	efiling.support@tylertech.com
Odyssey File & Serve Telephone	800.297.5377
GoTo Assist (Support)	Support may ask to assist you by sharing your screen using GoToAssist .