User Manual

For

EFM I2File.net

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Registration
User can register by selecting any one of the below two account types.

- **Firm Account** – You need to select this role during registration if you are an individual attorney or your firm is not registered in EFM.
- **Self-Represented Account** – You need to select this role if you are a ProSe filer, contract paralegal, court reporter, process server, etc.

Register a Firm Account

1. Click Register Button on top right corner besides User Manual Button.

2. This will open a popup where you need to click on “Firm Account” button.

3. Enter Firm Name, Address and other required details in firm information step and click on next button.
4. Enter User Information, Email Address, Password, Security Question and Security Answer in user information step and click on Register button to complete the registration. Email Address provided in this step must be a valid email address. Password must contain at least eight characters with one lower case letter, one upper case letter and one numeric character or special symbol.

5. An account activation email will be sent on entered email address.
6. Open the email and click on “Click to Activate Account” link for activating the user.

Register a Self-Represented Account

1. Click Register Button on top right corner besides User Manual Button.

2. This will open a popup where you need to click “Self-Represented Account” button.
3. Enter Address, Phone No. and other required details in Contact Information step and click on next button.
4. Enter User Information, Email Address, Password, Security Question and Security Answer in user information step and click on Register button to complete the registration. Email Address provided in this step must be valid. Password must contain at least eight characters with one lower case letter, one upper case letter and one numeric character or special symbol.

5. An activation email will sent to given email address.

6. Open the email and click on “Click to Activate Account” link for activating the user.
Login
Enter the email address and password registered in Odyssey eFileIL EFM, and click on “Login” button to login into the system.

Forgot Password
Please follow below steps for resetting your password.

1. Click on Forgot Password link in login screen.

2. This will open a popup. Enter Email address in it and click OK.
3. An email with link for resetting password will be sent on the email address entered above.

4. Open the email and click on “click here” link.
5. It will open a window shown below. Enter New Password and Confirm Password in it and click Change Password Button to change password.

Dashboard

You will be redirected to Dashboard after successful login. It displays information about most recent filings and allows you to file documents on a new case or existing case. Navigation tab on left provides links to access most of the features of the system.

Left Navigation tab is sub categorized into three sections.

- Workspace
- Admin Links
- Payment Information
Workspace

Submit Filing
This section under workspace contains links to file documents on new case or existing case.

New Case Filing

1. Click on “New Case Filing” link under Submit Filing section in left navigation tab or New Case button provided on dashboard to initiate new case filing.

2. Select Location, Case Category, Case Type, Filing Attorney and Payment Account in Case Information Step. Click on Next button after entering the required information to navigate to Party information step.
3. Party information step has a list at top indicating the party information mandatory for selected case type. You can enter First Name, Last Name and required details of parties by selecting a party from list. You can be add more parties to a case by clicking “Add Party” button.
4. After entering party information, click on “Next” button to move to filing tab and for going back to Case Information tab click “Previous” button.

5. Enter Filing Code, Filing Description, Reference Number and Optional Services if applicable for selected filing code in filings step. Fees will be shown on right hand side of the screen as highlighted in below screenshot.
6. Upload mandatory Lead document, any additional documents if required and select security for each document. Total size of all uploaded documents should be limited to the size configured for selected county.

7. Select payment account and party responsible for fees information on right hand side. You can add multiple filings in one envelope by clicking “Add Another Filing” button at the top.

8. Enter Filing Comments and Courtesy Copies after uploading the documents. Click “Next” button to go to Summary step or “Previous” button to go to Parties screen.
9. Summary step provides an opportunity to review the details of filling before submitting. Click on “Submit” button if all information is correct.
10. On successful submission of an envelope, you will get a success message with Envelope Number as shown below.
**Document Filing**

Document filing functionality will allow you to file an envelope on existing case, add parties on a case or add attorneys to existing parties; however, it will not allow you to edit existing party information or to change existing attorney assignments. Document filing is also termed as Filing on existing case or subsequent filing.

To File Documents on Existing Case, follow steps given below.

1. Click on “Document Filing” link under Submit Filing section in left navigation tab or click “File Document on Existing Case” button provided on dashboard to start document filing.

2. Case Search Wizard will open through which you can search for a case on which you want to file documents. For help on Case Search feature refer Case Search section in this document. Case Search Results will be displayed as shown below.
3. Click “Start a new subsequent filing for this case” icon against a case number in case search screen (shown in above screenshot) to start filing. If case is not available in the selected county and county allows filing documents on a non-indexed cases you can click on “File into An Existing Case” button (highlighted in below screen shot) to start **Non-Indexed Filing**.

4. For an indexed case, system will forward you to Parties step from case search screen. List of parties present on the case will be displayed at the top. You can add more parties on the case by clicking “Add Party” button. Attorney can be added to a party by selecting it (party) and then selecting an attorney from list displayed in bottom.
5. Click on “Filings” button for navigating to Filing screen.

6. On filing screen, there are two checkboxes - E-File and Service. Select any one or both depending on the type of filing you want to create.
   - E-File
   - Service Only
   - E-File & Serve
**E-File**

If you select only “E-File” checkbox then an envelope with Filing type - “E-File” will be created in selected jurisdiction.

a.) Enter Filing Code, Filing Description, Reference Number, and Optional Services if applicable for selected filing code in Filing Step. Fees will be automatically calculated and displayed at top right side.

c.) Enter Filing Comments and Courtesy Copies. You can add multiple filings in an envelope by clicking “Add Another Filing” button at top.

d.) Select Payment Account and Party Responsible for fees in payments section on right side of filing screen and select filing attorney if not selected. Once all information is entered, click “Summary” button to go to Summary page or click “Previous” button to go to Parties screen.
e.) Summary screen provides an opportunity to review the details of filing before submitting. Click on “Submit” button if all information is correct.

f.) On successful submission of filing, you will get Success message with Envelope Number.
If user selects only “Service” checkbox, then Service only filing will be created. Follow below steps for the same

a.) Enter Filing Description and Reference Number in filing step. Fees will be zero and displayed at top right side of the screen.

![Filing Description](image1)


![Upload Documents](image2)

c.) Multiple filings can be added in one envelope by clicking on “ADD ANOTHER FILING” button at top.

![Multiple Filings](image3)

d.) Click “Next” button to go to Service contact screen or click “Previous” button to go to Parties screen.
e.) Select at least one service contact who needs to be served electronically on Service screen. You can also add service contact from master list using “ADD FROM MASTER LIST” button. After selecting service contacts, click “Summary” button to move to summary page.

f.) Summary screen allows you to review the filing details before submitting. Click on “Submit” button if all information is correct.
g.) On successful submission of filing, you will get success message with Envelope Number.

**E-File & Serve**

If you select both – “E-File” and “Serve” checkbox then envelope with filing type - “E-File and Serve” will be submitted in selected jurisdiction. Electronic service will also be performed. Follow below steps to create “E-File and Serve” filing.

a.) Enter Filing Code, Filing Description, Reference number and optional Services if applicable for selected filing code on Filing screen. Fees will be calculated by the system and displayed at top right side.


c.) You can add multiple filings in one envelope by clicking on “Add Another Filing” button.
d.) Select Payment Account and Party Responsible for fees in payments section on right side. Select filing attorney if not selected then click “Next” button to go to Service Contact screen or click “Previous” button to go back to Parties screen. Screenshots shown below.

e.) Select at least one service contact who needs to be served electronically on Service contact tab. You can also add service contact from master list using “ADD FROM MASTER LIST” button. After selecting service contacts, click “Summary” button at bottom to move to summary tab.
f.) The Summary screen provides an opportunity to review the filing details before submitting. Click on “Submit” button if all information is correct.
g.) On successful submission of filing, User will get Success message with Envelope Number. Screenshot as shown below.

Non-Indexed Case Filing
Follow below steps for filing.

1. In Case Information step, Case Number and Location data will be prefilled based on what you had entered in the case search pop-up. Select category, case type, filing attorney and payment account in this step before clicking on “Next” button to move to parties screen.
2. Parties screen has a list at the top, which indicates the required parties for selected case type. You need to enter First Name, Last Name and required details of a party by selecting each party from list. User can add more parties to case by clicking “Add Parties” button. Enter the required information for all parties.

3. After entering party information, click on “Next” button to move to filing screen and for going back to Case Information screen click “Previous” button. Screenshots shown below.
4. Enter Filing Code, Filing Description, Reference Number and optional Services if applicable for selected filing code on filing screen. Fees will be calculated by the system and displayed at top right side of the screen.


6. You can add multiple filings in one envelope by clicking on “Add Another Filing” button.
7. Select Payment Account and Party Responsible for fees under payments section on right side and filing attorney if not selected. Click “Summary” button to go to summary screen or “Previous” button to go to Parties screen.

8. Summary screen gives you an opportunity to review the filing details before submitting. Click on “Submit” button if all information is correct.
9. On successful submission of filing, user will get success message with Envelope Number. Screenshot as shown below.
Filings
Filers can retrieve all details of their envelopes or firm administrator can view details of the envelopes filed by all attorneys of their firm from Filings screen. You can search for some specific filing using different filter criteria available on this screen.

1. Click on “Filing” link in workspace section of left navigation pane. Screen showing your filings will displayed.

2. Different filters are available on top, with which you can narrow down the search results (Date range, Firm filing or My Filing, Status, Location or Case/Envelope Number).

3. If filing was not created from I2File EFSP, click on “View All Filings” button to get that filing detail(s).

4. You can view details of particular filing by clicking eye icon under Action column of that particular row.
5. Click on Delete icon to cancel filing whose status is “Submitted”. It will ask for a confirmation, click yes to proceed with cancelation and No to abort the operation.

6. Filings details of EFile&Serve or Serve filings will contain eService details as highlighted below.

7. Click on “View” link in eService Details, to check SMTP logs.
Service Contacts

Service Contacts screen displays the eService recipients of your firm. Service contacts of a firm will receive an e-Service when a counsel files e-Service for a case.

Add Service Contact

To add service contact for a firm, you need to follow below steps

1. Click on “Add Contact” button below list of service contact as shown below.

2. Enter First Name, Last Name, email and all required information in service contact form as shown below. Click on “Save Contact” button at bottom to add service contact to firm.

3. On Successful addition, Notification Message will display as shown below.
**Service Contact Details**

Follow below steps to view Service contact details

1. Click on “View Service Contact Detail” icon in action column of particular service contact (Highlighted in below screenshot).

2. It will open a popup with details of particular service contact as shown below.

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**View Attached Case List**

1. Click on “View Attached Case List” icon in action column of particular service contact to view list of cases attached with a service contact.

2. It will open a popup with list of cases attached with a particular service contact.
Update Service Contact

Follow below steps to update service contact information

1. Select a service contact from the list by clicking on it. This will open service contact details in edit mode as shown below.

2. Click on save button after updating details of the service contact. Notification message will be displayed once the details are updated.
Remove Service Contact

1. Click on Delete icon against any particular service contact to remove it. It will ask for confirmation, press yes to continue and no to cancel the removal process.

2. Notification message will be displayed after removal of service contact.

Search Cases

You can search a case by docket no. or name of participants.

Search Case by Docket No.

1. Select County Location and enter Case Docket No to search a case

Search case by Party Name

1. To search a case using party name, click Advanced Search button at top right corner of search case screen. A popup window will open as shown below.
2. Select county location and party role. Based on the party role selected you will have to enter First Name and Last Name of the party or Business Name. Search Results will be sorted by criteria selected in “Show Result Sorted By” dropdown.

View Case Details

1. Click View Case Detail icon in case search result screen to view case details.
2. Popup will open showing details of the selected case

Manage Case Service Contacts

1. Click on Service Contact icon in case search result list to view and manage service contacts associated with a case. Popup window containing Service Contacts details will open as shown below.

Attach Service Contact

Follow below steps to attach service contact to case.
a.) Firstly, select the party to which service contact should be attached and click on “ADD FROM MASTER LIST” button at right bottom corner

b.) Popup for adding service contact will open. To attach service contact you can move service contact from Firm Service Contact list on left to Case Service Contact list on right with help of buttons (Arrow Keys) in between. Click “Save” button to save the changes.

c.) This will add selected service contact for a particular party. If no party is selected then service contact will be added under Other Service Contacts. Click “Save” button to save the changes.

d.) Notification will be displayed when service contact is attached successfully.
Detach Service Contact

To detach service contact from a particular case, click on Detach service contact icon. Notification message will be displayed on successful removal.

Admin Links

Firm Administrators can manage firm information, firm users and attorneys in their firm through the links available under “Admin Links” section.

Firm Information

This screen enables firm administrator to view and update firm Information if required.
On successful update, it will show message as given below.

Firm Users

This screen allows Firm Administrators to add, modify and remove firm users.

Add Firm User

1. Click on “Add Firm User” Button below list of firm users to add Firm users
2. It will open a form to enter user details. Enter first name, last name, email address and roles of user before clicking “Save” button. If attorney role is checked then user will also registered as attorney.

3. After successful addition of user, a Notification Message will be displayed. An activation email having password will be send on given email address.

4. Open the email and click on “Click to Activate Account” link to activate account
5. If a firm user did not receive activation email, firm administrator can resend activation email by clicking “Resend Activation” button in user detail section of selected user.

6. After activation user can login in using password given in email. For security, it is advised to change password after first login.

*Update Firm User*

1. Select firm user from list of firm users by clicking on it. This will open user information in editable mode.

2. Click on save button after modifying the required details to update firm user information.
3. Firm administrator can reset password of their firm users by clicking “Reset Password” button in Firm user details section. A popup will open in which firm administrator needs to enter new password and click “Continue” button.

Remove Firm User

1. Click on Delete icon in action column against any particular firm user to remove it. It will confirmation dialogue box.

Attorneys

Click on Attorney link under “Admin Links” section in left navigation tab to manage attorneys of firm. This will open list of attorneys as shown below.

Add Attorney

1. Click on “Add Attorney” button below the list of attorneys for adding an attorney in your firm.
2. It will open a form for adding an attorney. Enter first name, last name and attorney number before clicking save button to add an attorney to a firm. If “Save Attorney as Firm User” check box is checked then attorney will also registered as firm user.

Update Attorney
1. Select an attorney from attorney list by clicking on it. This will open attorney information in edit mode as shown below.

2. For updating details of attorney, click on “Save” button after making necessary modifications.
Remove Attorney
For removing an attorney from your firm, click on Delete icon under action column against the attorney you want to remove. It will show confirmation dialogue box.

Payment Information
This section enables users to manage their payment accounts.

Payment Accounts
You must have at least one Payment Account in order to be able to e-File. A new payment account can be created as and when it is needed using a credit card or debit card. Creating a Waiver Payment Account allows you to submit filings for indigent and other no-fee cases.

Click on Payment Accounts link under payment information section to open payment account list.

Add Payment Account
Click on “Add Payment Account” button below list of Payment accounts for adding a payment account.

There are three type of payment accounts:

- Waiver
• e-Check
• Credit Card

Steps for adding Waiver Type payment account

1. Enter Payment Account Name and Select Waiver in Payment Account Type Dropdown. Check the “Active” Checkbox and Click “Save” button to save payment account.

Steps for adding e-Check payment account

1. Enter Payment Account name and select e-Check in Payment Account type dropdown before clicking “Enter Bank Information” button.

2. You will be redirected to a page in another website as shown below. Select “e-Check” as the method of payment.

3. Enter all required details and Click “Continue” button. It will take you to a verification screen as shown below.
4. Click on “Save Information” button. You will be redirected to payment account list on successful addition.

Steps for adding Credit Card Type payment account

1. Enter Payment Account Name and select Credit Card as the Payment Account Type before clicking “Enter Credit Card Information” button.

2. You will be redirected to a page on new website as shown below. Select Credit Card as the method of payment.

3. Enter all required details and Click “Continue” button given below. It will take you to a verification screen as shown below.
4. Click on “Save Information” button. You will be redirected to payment account list on successful addition.

Delete Payment Account

1. Click on “Delete” icon in action column of payment account list to delete the selected payment account.

Account Settings

User can edit profile details, change password or manage notification email preferences through account settings menu highlighted below.
My Profile

1. Click on My Profile link under account settings menu, to display profile details as shown below.

![My Profile Form]

2. Modify any information if needed and click on save button to save the changes.

![Manage Notifications]

Manage Notifications

It enables user to configure list of notification emails that user would like to receive.

1. Click on Manage Notification under Account settings.

![Change Password]

Change Password

Follow below steps for changing your password
1. Click on Change Password under Account settings.

2. Enter Old Password, New Password, Confirm New Password, Security Answer and click “Save” button. Notification Message will be displayed once the password is changed.