

# File and Serve Quick Guide

## How To Initiate New Case Filing

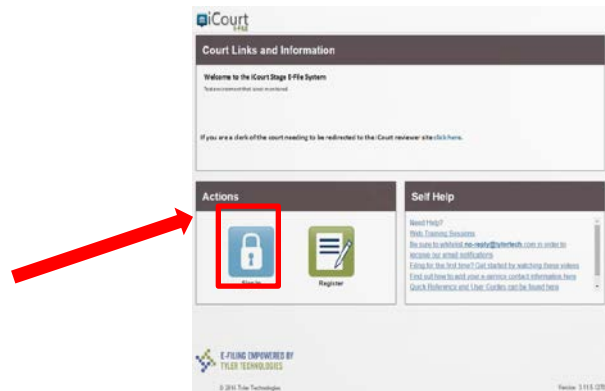
### How to Initiate New Case

This reference guide contains the following sections for entering a new criminal complaint into Odyssey:

- How to sign into File and Serve
- Initiating a New Case
- Adding Party Case Information for the Plaintiff
- Adding Other Party Information

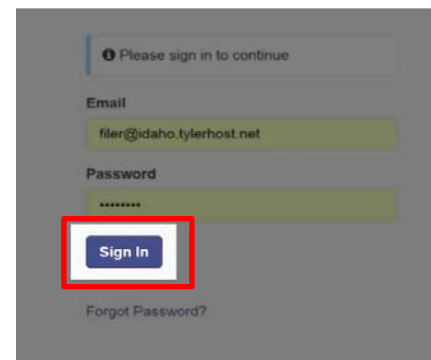
### Sign In to File and Serve

1. On the Home page click on the **Sign In** icon.



2. Type in your user email address and password and click the **Sign In** button. This is the username and password established when you registered in File and Serve.

When you press enter you will be moved to the **Filer Dashboard** where you can initiate a new case.



### Initiating a New Case

There are options to initiate a new case.

1. First option
  - a. Click on the **Actions** button at the top right corner of the Filer Dashboard.
  - b. In the drop down menu select **Start a New Case**.
2. Second option
  - a. Click on the **Start a New Case** button in the center of the screen.

### Adding Case Information

1. From the Add a Filing Screen enter the case information into the application. Click on each of the follow down arrows to access the menus for each of the following fields:

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Location  
Category  
Case Type  
Filing Attorney

2. Once you have entered all the case information, select the Save Changes button at the bottom right of the screen.



The screenshot shows a web interface titled "Add Filing". Below the title is a "Case Information" section with a close button. It contains four dropdown menus: "Location" (Twin Falls County Magistrate Court), "Category" (Civil), "Case Type" (A4 - Personal Injury or other claims), and "Filing Attorney" (Test Filer). At the bottom right, there are two buttons: "Undo" and "Save Changes". A red arrow points to the "Save Changes" button, which is also highlighted with a red box.

3. Based on the selections you made in the case information section, the party information will populate with the required party types.

### Entering Case Information for the Plaintiff/Petitioner

1. If the plaintiff is a business, check the **Party is a Business/Agency** box in the center of the screen.
2. To enter the attorney, click on the drop down menu and find the attorney for the case you are filing on behalf of.
3. When you have entered all of the information click the **Save Changes** button at the bottom right of the screen.

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Party Type	Party Name	Attorney
Plaintiff	Fitch and Associates	Required Party
Defendant		Required Party

Enter details for this Party

Enter all required fields for this party.

Party Type: Defendant  
Party is a Business/Agency:   
Attorney: Pro Se

First Name: John  
Middle Name: T.  
Last Name: Scopes  
Suffix:

Country: United States of America

Address Line 1: 456 Elm Avenue  
Address Line 2:

City: Twin Falls  
State: Idaho

Zip Code: 83301  
Phone Number: 208-911-1234

Undo Save Changes

Only the fields that are highlighted in red are required.

### Adding Other Party Information

1. Enter other party information in the required fields highlighted in red. Other party information may also be added.
2. Click on the **Save Changes** button in the lower right corner of the screen.
3. If you need to add an additional parties, click the **+ Add Another Party** button, select a party type, and then complete the party information as described above.

Party Type	Party Name	Attorney
Plaintiff	Sue Smith	Required Party
Defendant	Mercedes Benz	Required Party

Actions

+ Add Another Party

Enter details for this Party

Party Type  
Party is a Business/Agency

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### Enter a Filing

Party Type	Party Name	Attorney	
Plaintiff	Atticus Finch	Test Filer	Required Party
Defendant	John T. Scopes		Required Party
<a href="#">Add Another Party</a>			

#### Filings

Enter the details for this filing

**Filing Type** EFile **Filing Code** Complaint

**Filing Description**  
Complaint for Eviction

**Reference Number** 15308 **Filing Comments**

**Courtesy Copies**  
client1@email.com, client2@email.com

**Lead Document (Required)**  
Select a file to upload

**PDF Format only** Undo Save Changes

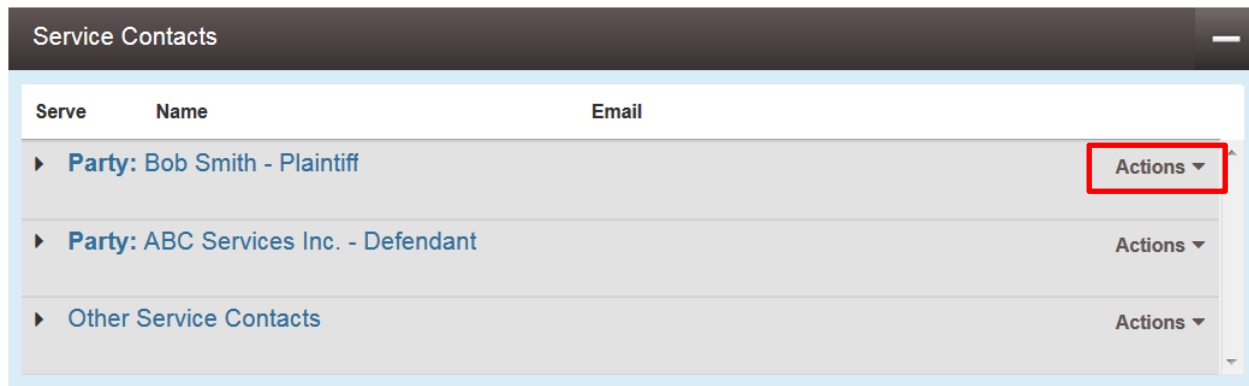
1. In the **Filing Type** field, enter efile from the drop down menu.
2. In the **Filing Code** field, click on the drop down menu and select the proper code.
3. In the **Filing Description** field, provide a complete title of the pleading.
4. Place the internal client tracking number in the **Reference Number** field.
5. Enter **Filing Comments** for court review in the Filing Comments field.
6. If you want to send courtesy copies to another party such as a client, enter the email address into the **Courtesy Copies** field. Separate each email address with a comma.
7. Upload documents into the **Lead Document** field. Any document requiring a file stamp is loaded as a lead document  
**Note:** to avoid having a filing rejected, upload the all documents in **pdf format**.
8. Provide a description of the document you have filed in the Description field.
9. In the Security field, select a level of security from the drop down menu.
10. NOTE: If you have multiple documents to file in the same case you must repeat these steps so that all documents are loaded into this one envelope (filing session). *Failing to do so and filing documents separately may result in your filings being rejected.*
11. Click on Save Changes in the lower right hand corner of the screen.

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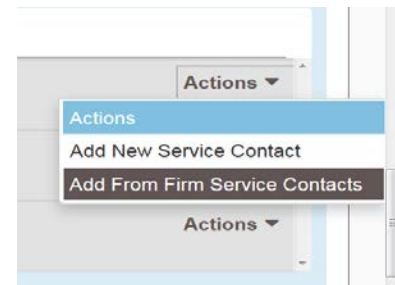
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### Designate your Service Contacts.

In order to serve and be served through the e-filing system the parties must all designate a service contact on a case by case basis. After you have loaded your documents for filing you will see a box to select the service contact for the party you represent.



Click on the **Actions** button to the right of the party names for a drop down to choose between building a new service contact or selecting a service contact developed by your firm administrator. You only make a selection for the party you or your attorney represents. You will not designate a service contact for other parties.



Once you make your selection you do not need to repeat this process again unless you need to modify your service contact.

### Initiating a Fee

1. In the **Payment Account** field, select a method of payment that will be used to pay the processing fees.
2. Select the **Party Responsible for Fees** drop down menu and select the name of the person responsible for the payment of fees related to this case.
3. Click **Save Changes**.
4. Click **Continue** in the lower left corner of the screen. This will automatically take the filer to a review screen where all information provided on the case should be reviewed and verified.

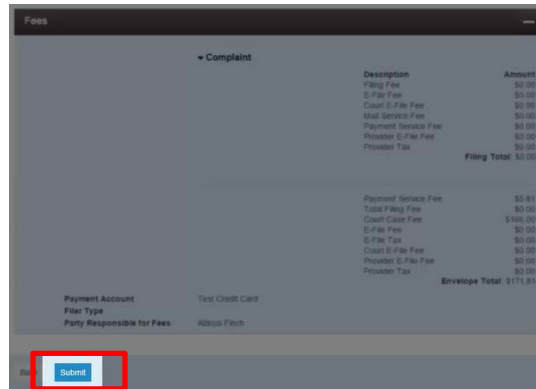
### Verify the Information Filed

1. From the Filer Dashboard, review and verify the information in the following fields:
  - a. Case Information
  - b. Party Information

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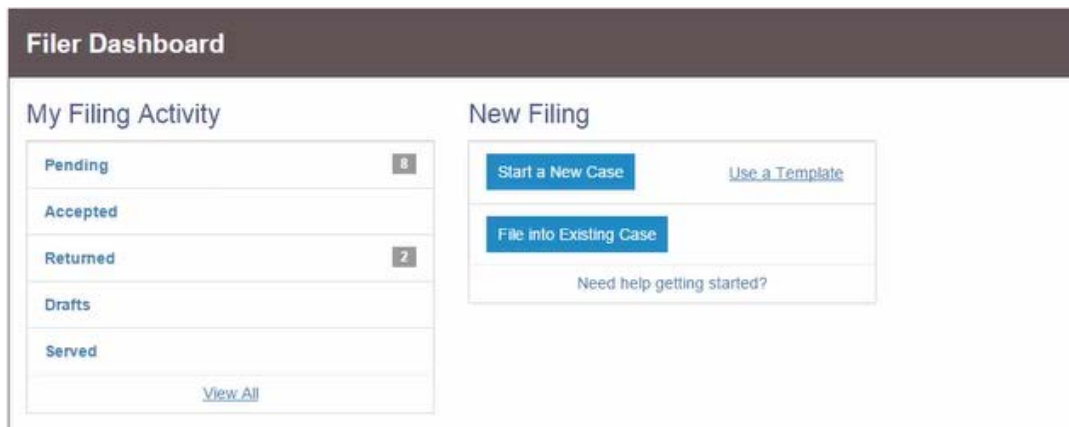
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- c. Filings
  - d. Fees
2. Once all the information on the page is verified, scroll down the page click on the **Submit** button in the lower left hand corner of the screen.



### Review All Filing Information – Filer Dashboard

Review all the information regarding the filling from the Filer Dashboard Page.



### Email Confirmation of Filing

Shortly after submitting a filing the filer will receive an email indicating the submitted file was received. Upon court clerk review you will receive a second email indicating if your submission was accepted or rejected by the court.

If the filing was accepted by the court the filer will receive a second email with the following information:

- a. Case Number
- b. Link to the Filed Documents

If the filing was rejected, the filer will receive an email indicating the reason(s) for rejection and the filer will be expected to resubmit.

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**Note:** It is recommended you promptly review and download all documents upon receiving them as they will only be available via the sent link for a specific period of time.

This email constitutes service for anyone registered in the iCourt eFiling system.