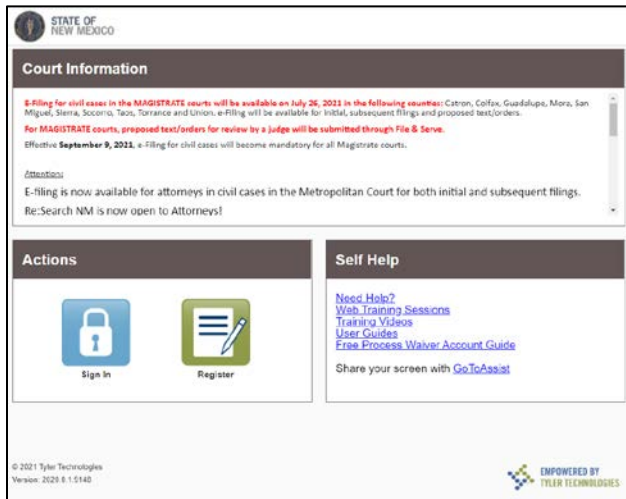
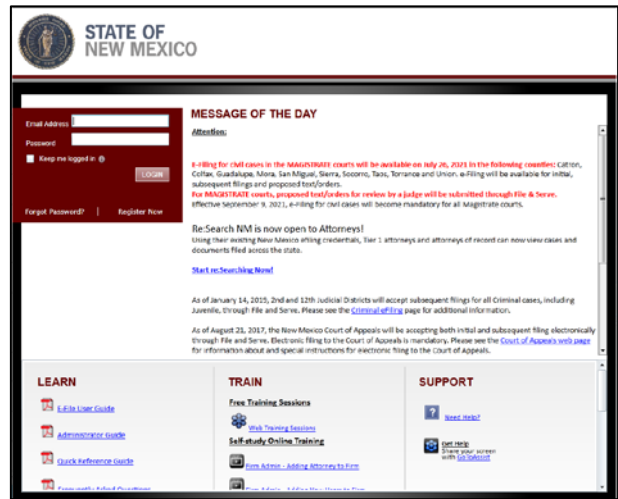


Quick Reference Guide for File & Serve Filer Application (HTML5) for Court Staff



File & Serve Filer Application (HTML5)

- Use for all filing activities
- Track your filings
- “The blue one”

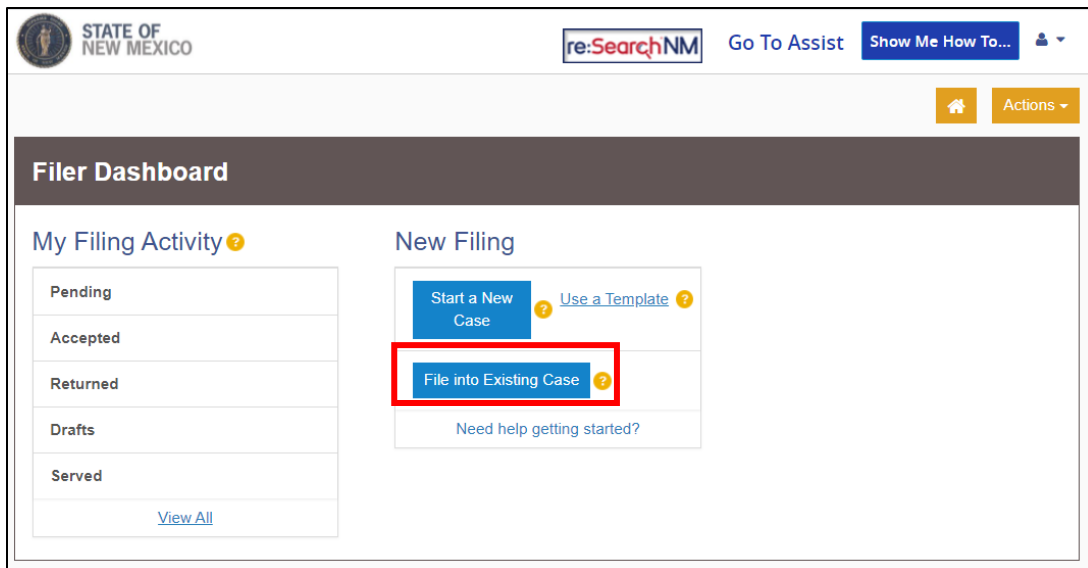


File & Serve Reviewer Application (Silverlight)

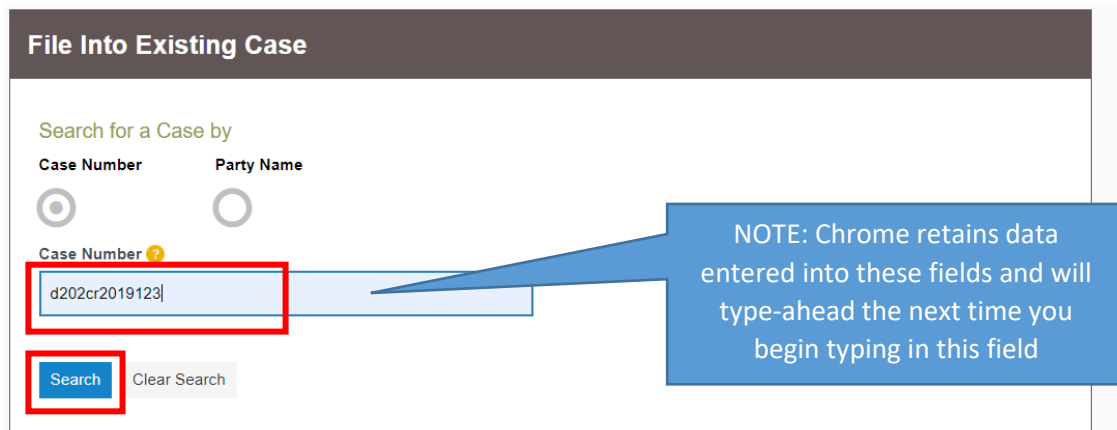
- Use for reviewing envelopes
- Use for court admin activities
 - Add/modify users
 - Unlock envelopes
 - Add/modify court service contacts
- “The red one”

Quick Guide for filing using the File & Serve Filer Application (HTML5)

1. In the **Chrome** browser, navigate to: <https://newmexico.tylerhost.net/ofswb>
 - a. NOTE: the testing site is: <https://newmexico-stage.tylerhost.net/ofswb>
2. Log in using your **File & Serve** login (both Silverlight and HTML5 use the same one)
 - a. **DO NOT CLICK REGISTER**
3. From the **Dashboard**, click on **File Into Existing Case**



4. On the search screen, **type in the case number** you will be filing into and click **Enter** or **Search**
 - a. Dashes and leading zeros are not necessary



5. Check that the case displayed in the results is the one you are looking for
6. Use the **Actions** dropdown arrow to select **File Into Case**



7. Once the case details have loaded and display, scroll down to the **Filings** section
8. Use the **dropdown arrow** to select the appropriate **Filing Type**

The screenshot shows a web interface titled "Filings" with a "Need Help?" link. Below the title is the instruction "Enter the details for this filing". There are two main sections: "Filing Type" and "Filing Code". The "Filing Type" dropdown menu is open, showing three options: "EFile", "Serve", and "EFileAndServe". The "Filing Code" field is empty. There is also a "Comments to Court" field with a help icon.

- eFile (which allows the filing code and document to be docketed in Odyssey, but not served to the service contacts)
- Serve or (which does not docket in Odyssey and requires service contacts)
- eFileandServe (which allows the filing code and document to be docketed in Odyssey and requires service contacts)

9. Use the **dropdown arrow** to select the appropriate **Filing Code**

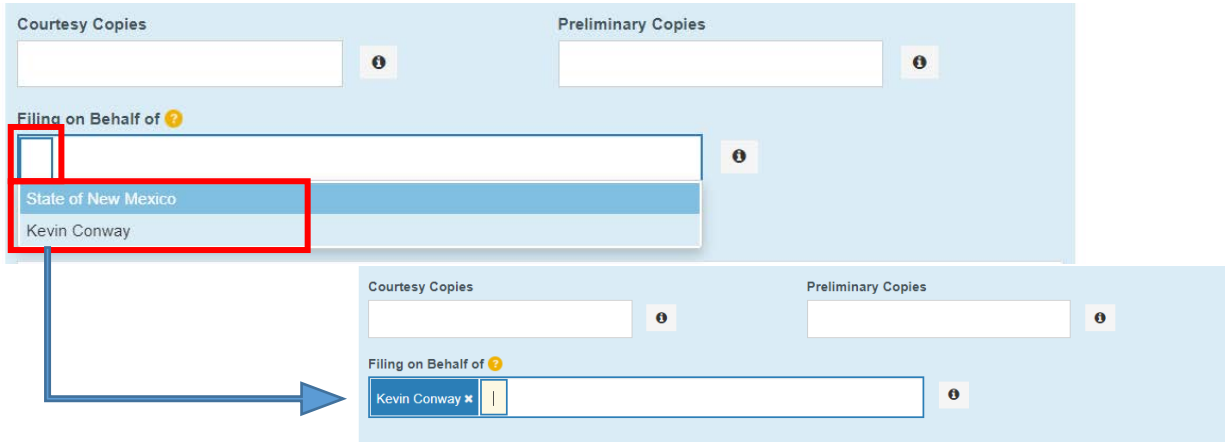
The screenshot shows the 'Filings' form with the following fields: 'Filing Type' (EFileAndServe), 'Filing Code' (dropdown menu), 'Filing Description' (text area), 'Client Reference Number' (text field), and 'Courtesy Copies' (text field). The 'Filing Code' dropdown menu is open, showing a list of options: 'Abstract sent to MVD with J&S', 'ACCEPTANCE OF APPOINTMENT', 'ACCEPTANCE OF SERVICE', 'ACKNOWLEDGEMENT', and 'ADDENDUM'. The dropdown arrow is highlighted with a red box.

10. In the **Filing Description** field, type in a filing description that will display as a comment to the event in Odyssey
11. In the **Client Reference Number**, type in your initials
12. If a note to the court reviewer is necessary, type it in the **Comments to the Court**

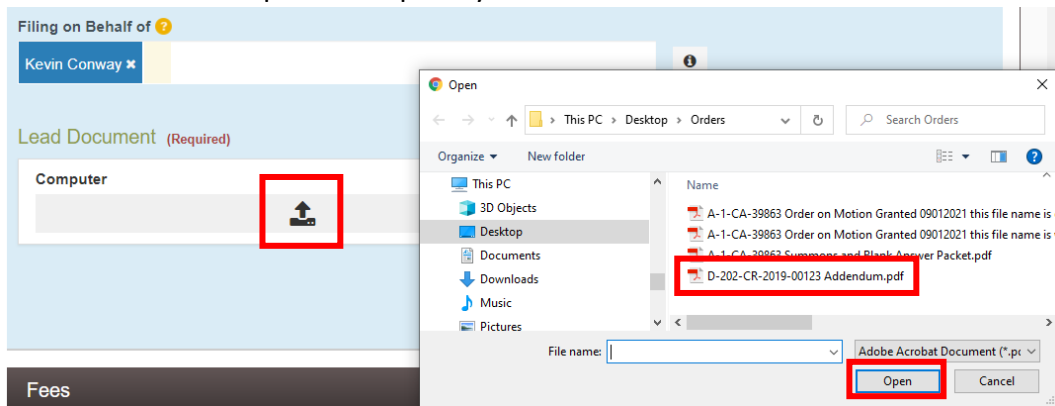
The screenshot shows the 'Filings' form with the following fields: 'Filing Type' (EFileAndServe), 'Filing Code' (ADDENDUM), 'Filing Description' (Addendum to Motion for Dismissal), 'Client Reference Number' (LMO), 'Comments to Court' (please be sure to call me when you get this), 'Courtesy Copies' (text field), and 'Preliminary Copies' (text field). A blue callout box with a white border points to the 'Filing Description' field and contains the text: 'NOTE: Chrome retains data entered into these fields and will type-ahead the next time you begin typing in this field'. The 'Filing Description', 'Client Reference Number', and 'Comments to Court' fields are highlighted with red boxes.

13. The Courtesy Copies and Preliminary Copies fields are used by some courts, but note: although the emails entered here display in the envelope details as historical data, they are not logged the way service contacts are, and do not show whether the enotification was received or opened by the recipient.

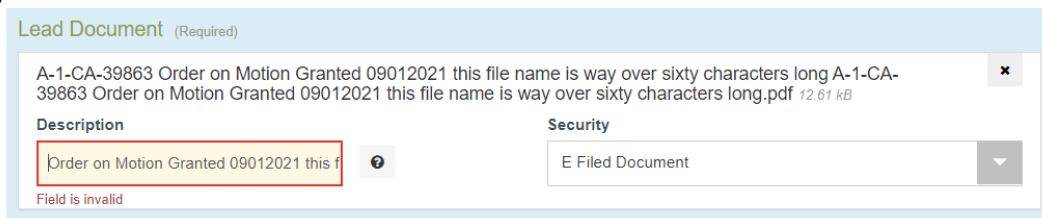
14. Place your cursor into the **Filing on Behalf of** field to see a display of the parties on the case
 - a. This is NOT a required field, and courts that have been using the “Associate Parties” section in Silverlight can continue to use this field for the same reasons and it will display the same way in Odyssey as it has.
15. Click on each of the parties you want to associate with this filing



16. Click on the **black up arrow** to upload the PDF document you are going to file
17. Navigate to and select the PDF document
18. Click **Open**
19. Wait for the file to upload completely



20. If the file name is too long, an error will display, requiring you to shorten the file name before you can continue



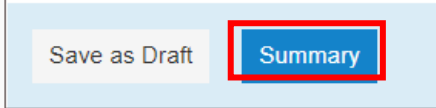
21. Click **Save Changes**
22. Once, the first is saved, you can click **Add Another Filing** to add additional filings/documents to this envelope

23. If you have selected **Serve** or **EFileandServe** as your Filing Type, there must be **Service Contacts** linked to the parties
24. Make sure the **Service Contacts are checkmarked**
25. If there are not service contacts, you must reach out to the filers to tell them to add themselves

Serve	Name	Email	Actions
<input checked="" type="checkbox"/>	Romeo Vallejo	romeovallejo@gmail.com	Actions
<input checked="" type="checkbox"/>	Mario Fernandez	mfern@mailinator.com	Actions

26. Courts use the **Waiver Account** as the Payment Account to zero out the fees for both all filing types
27. Courts select the **Court Filer**, or the designated court attorney for the Filing Attorney
28. Click **Save Changes**

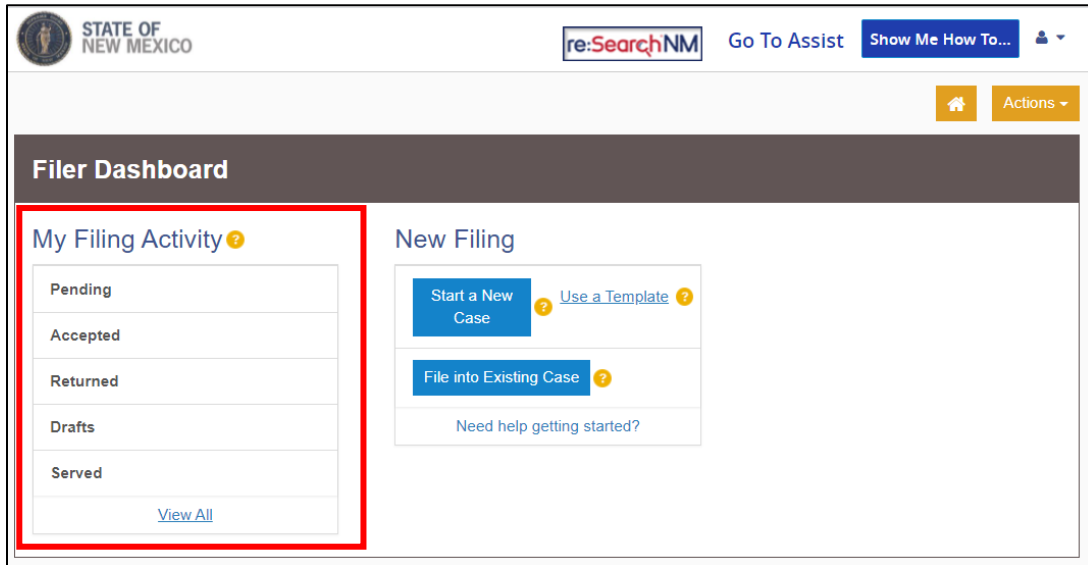
29. Click Save as Draft to save for later, or **Summary** to proceed



30. After review of the summary, click **Submit** to send the envelope to the court's Review Queue



31. All of your filings can be tracked in the folders in the **My Filing Activity** area of your Dashboard



32. If you will be reviewing and accepting the envelope you just filed, you will navigate to the File & Serve Reviewer application to do so