

Basic File & Serve Trouble Shooting

- 1. Who can trouble shoot in File & Serve:**
 - a. The court's F&S admin
 - b. JID Service Desk
 - c. Tyler Technologies
- 2. The components of a new F&S user:**
 - a. User account
 - b. Roles
 - c. Nodes
 - d. Queues
 - e. Signature stamps
- 3. The roles a F&S user can have:**
 - a. Court admin of the F&S firm account
 - b. Filer to be able to submit filings and see the filer's filing codes
 - c. Reviewer to be able to review envelopes and/or to see the court's filing codes
 - d. Attorney for the court's filings to be filed on behalf of
 - e. Or a combination of any or all of the above
- 4. How an image stamp gets created:**
 - a. User signs a piece of paper
 - b. Court scans the signature at 300dpi and saves as a jpeg
 - c. Court creates an incident that includes the user's full name, nmcourts email address, and the court F&S firm name, with the jpeg signature attached to it and instructions on whether it should have an opaque or a transparent background
 - d. JID converts the image to a .png file and sends it to Tyler
 - e. Tyler attaches the .png file to the user's F&S account
- 5. To edit an account**
 - a. Go to Court Admin
 - b. Court Users
 - c. Select user's account
 - d. Change the text in the fields where necessary
 - e. Save
- 6. To change a password**
 - a. Go to Court Admin
 - b. Court Users
 - c. Select the user's account
 - d. Use the Change Password hyperlink in the lower right
 - e. Change the password and provide to the user
 - OR
 - f. From the home F&S page use the Forgot Password hyperlink
- 7. Multiple accounts for one user**

- a. There can only be one email address per user per account
- b. If the user already has a F&S account, the old one will need to be disabled by Tyler before creating the new one

8. When to submit a JID incident when creating a new user:

- a. When the user needs access to the court's F&S queues
- b. When the user needs to have signature stamps

9. The three types of F&S stamps are:

- a. The auto-generated file stamp in the upper right corner of the pleading
- b. Text stamps
- c. Image stamps

10. How to get an image stamp in F&S:

- a. User signs white piece of paper
- b. Court scans the paper at 300dpi and saves as a jpeg file
- c. Open a JID Incident and include the includes the user's full name, nmcourts email address, F&S firm name, and signature image ATTACHED as a file to the incident (or send separately in an email) – do not insert, embed or link
- d. JID will convert the image to a png with a transparent background
- e. Tyler will attach the png image to the user's account
- f. If the court has a special seal image they want used, it will need to be a vector file to begin with for clarity

11. Unlock envelope

- a. Go to Court Admin
- b. Go to Unlock Envelope
- c. Type in envelope number
- d. Click Unlock

12. Errors in the Errored Filings Queue

- a. Envelope stuck in "court processing" status in the Review History tab means the envelope is most likely in the Errored Filings queue
- b. Go to the Review Queue tab to filter on the Errored Filings queue
- c. Click play to see the error

13. Error: The following schema violations were found: 0%

- a. Data entered by the filer in the Parties tab needs to be fixed (wrong format of email address, or SSN)
- b. Go to the Edit tab
- c. Navigate to the Parties tab
- d. Check each data entry field for each party to determine the problem and fix the error
- e. Save and Accept the filing
- f. If the court does not have permission to change the data, the envelope must be rejected

14. Error: A document conversion error could not be translated

- a. There is a problem within the PDF that the filer submitted
- b. The envelope must be rejected with instructions to the filer to inspect the document to make sure it conforms with the PDF restrictions from Tyler Technologies

15. Error: The code word “XXXX” in the Case Event Types code table is hidden at node “XXXX”

- a. It means a filing code is displaying in F&S that has been obsoleted in Odyssey (which happens when updates are made to filing codes)
- b. Go to the Edit tab
- c. Navigate to the Filings page
- d. Change the filing code to one that the court is now using for this pleading type
- e. Save and Accept the envelope

16. Error: An Error dialog box displays

- a. If an error dialog box displays and prevents you from working in F&S, you need to log out
- b. If you cannot log out, press Ctrl+Alt+Delete to get to the Task Manager where you will highlight Internet Explorer and press the End Task button
- c. Delete the Silverlight cache
 - i. Right click in the maroon sign in area
 - ii. Click on Silverlight
 - iii. In the dialog window that displays, choose the Application Storage tab
 - iv. Click Delete All, Yes, OK
- d. Delete the Internet Explorer browser history
 - i. Click on the Internet Explorer gear icon
 - ii. Select Internet Options
 - iii. Select Delete Browser History
 - iv. Delete and OK
- e. Log back into F&S

17. Error: The filing could not be processed into the case management system due to an invalid transaction date on a financial charge or payment...

- a. Coordinate a call with JID Odyssey Business Support team, so the back dating configuration in Odyssey can be “opened” momentarily while the court admin accepts the filing, and then JID will revert the configuration back to closed as soon as the filing has transmitted to Odyssey successfully.

18. Banner: This Envelope has been copied from an Envelope which contains at least one Rejected or Submission Failed Filing

- a. **This is not an error, but an alert to use the Copy Docket Date button**
- b. Click the Copy Docket Date button to use the filing date of the original envelope/filing

- c. If you need to first confirm that the original reason for the rejection was resolved properly, you can click on the magnifying glass icon to the right of the copy docket date
- d. View the envelope details to see what the original rejection reason was and then inspect the contents of the new envelope to confirm it was addressed satisfactorily

19. A non-attorney Pro Se attempts to electronically file in F&S

- a. This happens very rarely, but it is important for the reviewer to make sure envelopes have an attorney attached
- b. Reject non-attorney filings, letting the filer know only active attorneys with CAID numbers can e-file in New Mexico
- c. Tell JID if you encounter a repeat offender

20. Financial Errors

- a. Tyler Technologies but intervene on all envelopes that get stuck and cause a financial error
- b. Often this is caused by a partial accept / partial rejection on the same envelope that has a fee associated with it
- c. Send financial errors to JID with the envelope number
- d. Tyler will clear the transaction on their side, the court will need to fully reject the envelope and then (if applicable) refund the filer
- e. Always fully accept or fully reject an envelope

File and Serve PDF Information for Averting Failed Submissions

Computer File Size Measurements:

- Largest - Gigabyte (GB)
- Large - Megabyte (MB)
- Small - Kilobyte (KB)

File and Serve File Size limits:

- 25 MB per file
- 35 MB per envelope

File and Serve DPI Limits:

- 200-300 dpi (200 better)
- Note this on both the scanner settings and the Adobe PDF Printer preferences

Formatting:

- Black and White
- Pages must be 8.5" x 11" (right click in document and select Properties to see page size)
- NO landscaped pages (these can be rotated to portrait on a single page using Adobe Pro Tools, Organize Pages or on the whole document by right clicking and selecting Rotate Page)

Check for Embedded Fonts:

- In the PDF, right click and select Properties
- Click the Fonts tab
- If the window is blank, there are none

Reduce the File Size (compress):

- Make all pagination and comments on document first;
- Combine the PDFs;
- File, Save as Other, Reduced Size PDF, OK to Retain Existing, Select Location, Rename File, Save
- Check the PDF for image quality
- If the file size exceeds the limits, break the PDF into multiple files and repeat the process.

PDF Page Limit to Maintain the File Size:

- This is entirely dependent on the content of the PDF, but (anecdotally) a PDF that has been created by scanning or by printing to the PDF Printer can meet the 25 MB limit by keeping it to around 100 pages