E-Filing Guide for Self-Represented Litigants

How to E-File in Odyssey
Step 8: Upload Your Documents in the Filings Section

ODYSSEY eFileIL™

E-filing Steps

1	• Prepare Documents
2	• Register
3	• Sign In
4	• Create New Password
5	• Add Payment Account
6	• Case Information
7	• Party Information
8	• **Upload Filings**
9	• Pay Fees
10	• Review Summary / Submit

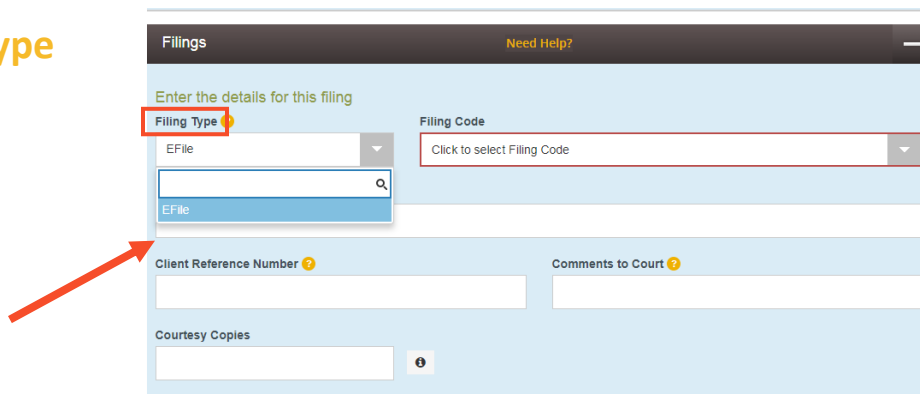**Need Help? Call Odyssey's Filer Support Number: 1-800-297-5377**

Upload documents and complete the Filings section

The documents you want to file with the court have to be uploaded into the system. This all happens in the **Filings** section after you have completed the Case Information and Party Information. The whole packet of what you upload to file is called an "envelope" in the e-filing system.

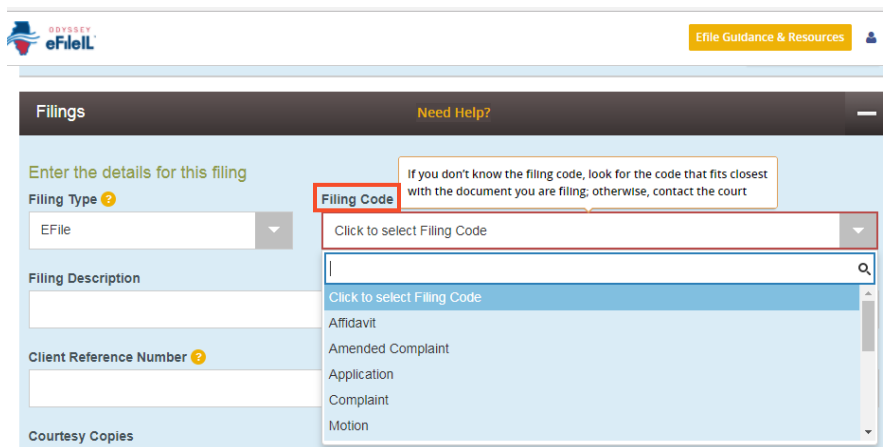## Choose the Filing Type

1. Click on **Efile**.

This box should be defaulted to Efile, but some Locations may also have Serve or EfileAndServe as Filing Type options. Make sure you select Efile or talk to your court staff about the other options. Note: selecting Serve or EfileAndServe does NOT qualify for service of process.

Choose the Filing Code

1. Click on the **Filing Code** box for the drop down menu. Filing Code means the type of document that you are filing with the court (for example: Complaint, Motion, Waiver).

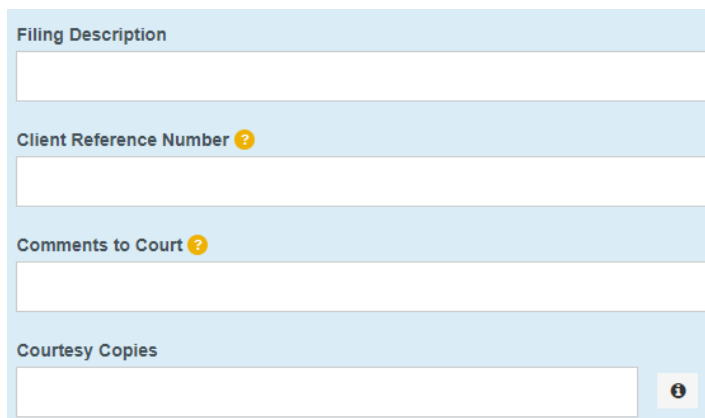2. **Click** on the type of document you are filing.

If you don't know your Filing Code ask the court staff so there is no problem with your filing.

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3. Once you select the Filing Code, you have the option of filling out four boxes, but they are not required.

   a. Filing Description (optional)
      i. This is just for you to remember what you are filing.
   b. Client Reference Number (optional)
      i. This is a tracking number for lawyers to use to know which client's case they are filing in. Since you are representing yourself, you won't use this box.
   c. Comments to Court (optional)
      i. These comments are for the court reviewer to read when assessing your document.
   d. Courtesy Copies (optional)
      i. You may enter a list of email addresses (separated by a comma) for where you want the document sent.

   ℹ **Note: this is a courtesy and does NOT qualify for service of process or proper notice.**

Explanation of Lead Documents, Attachments, and Document Size

What is a Lead Document?
➢ Any document that you need the court to look at to be able to give you what you want.
   o For example, if you want the court to grant your request to move your court date, upload your Motion for a Continuance as a Lead Document.
➢ All notice documents (such as a Notice for Court Date, Notice of Motion) are Lead Documents.
➢ You can file more than one Lead Document at a time.
   o For example, you could have Lead Document 1: Notice of Motion; Lead Document 2: Motion for a Continuance; and Lead Document 3: Application for Waiver of Court Fees.
   o An *Application for Waiver of Court Fees* is always a Lead Document and should be filed at the same time as your other documents. If the court already approved your Application for Waiver of Court Fees, you should file a copy of the approved *Order* as an attachment to anything you file after that.

What are Attachments?
➢ A category of filing that is only an option in some counties and for some types of Filing Codes. If you don't see Attachments as an option, file everything in the Lead Document section. You can do that by making the Lead Document and any attachments/exhibits one PDF, and upload as a Lead Document.
➢ Any document that you reference in your Lead Document, but is not technically part of the Lead Document. They are usually called exhibits or attachments.
   o For example, if you write an Answer in an eviction case saying why you shouldn't be evicted, that written explanation is the Lead Document. In the Answer, you reference a receipt for paying rent. The copy of the receipt could be labeled Exhibit or Attachment 1 and would be an Attachment, not a Lead Document.

What are the Document Size Limits?
➢ For Trial Courts, each document cannot be larger than 25MB and a combined total of 50MB per filing.
➢ For the Supreme Court and the Appellate Courts the file size limit is to 150MB.

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➡ **Upload First Lead Document (Required)**

ℹ All Lead Documents MUST be uploaded as separate Lead Documents or your filing may be rejected. This means that you have to scan or save each Lead Document separately so you can upload it separately. Generally speaking, most filings will have *at least* 2 Lead Documents: (1) the main document you are filing and (2) a notice or proof of delivery document.

ℹ If any Lead Document is more than one page long, all the pages of the same document should be scanned/saved as one document and uploaded as one document. For example, if your Motion is 3 pages long, all 3 pages should be uploaded as one Lead Document.

1. Click on the **Upload Icon** under the Lead Document heading.

   Lead Document (Required)
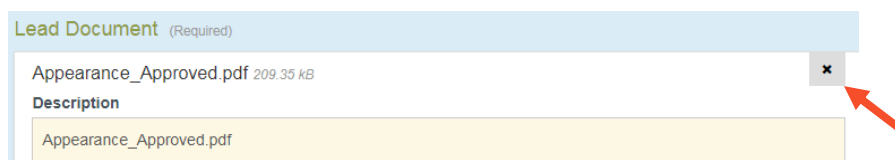
   Computer

2. A Window will pop up where you will select your document.

3. Find where the document is saved on the computer (desktop, documents folder, flash drive).

4. Select the document you would like to file and click **Open**. The document title will appear in the Description Box.

5. If you selected the wrong document, you can delete it by clicking on the **X** in the right corner.

   Lead Document (Required)

   Appearance_Approved.pdf *209.35 kB*   **x**
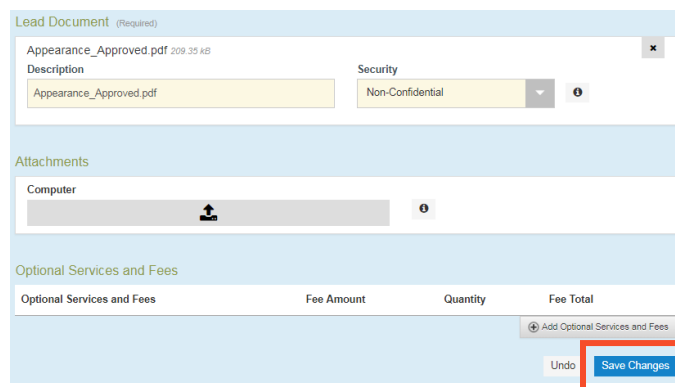   **Description**
   Appearance_Approved.pdf

6. Once you have the correct document, select the drop down menu for the **Security** box. Click whether the document is public (non-confidential) or confidential.
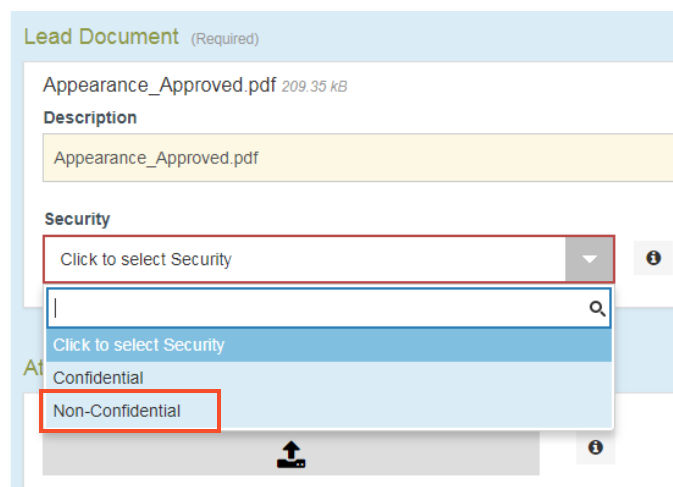
   Lead Document (Required)

   Appearance_Approved.pdf *209.35 kB*
   Description
   Appearance_Approved.pdf

   Security
   Click to select Security

   Click to select Security
   Confidential
   Non-Confidential

ℹ Most court documents are public (non-confidential) even though they contain personal information that you may like to keep private. You may need a court order to be able to select confidential. Please speak to court staff before selecting confidential because your filing may be rejected.

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7. If your Lead Document doesn't have attachments or optional services, Click **Save Changes**. If your Lead Document has attachments or you want optional services, see below.

Upload Attachments (Optional)

1. Click on the **Upload** Icon under the Attachments heading.

2. A Window will pop up where you will select your document.

3. Find where the document is saved on the computer (desktop, documents folder, flash drive).

4. Select the document you would like to file and click **Open**. The document title will appear in the Description Box.

5. If you selected the wrong document, you can delete it by clicking on the X in the right corner.

6. Once you have the correct document, select the drop down menu for the **Security** box. Select whether the document is public (non-confidential) or confidential.

7. Click **Save Changes** (unless you want Optional Services, see next page).

Most court documents are public (non-confidential) even though they contain personal information that you may like to keep private. You may need a court order to be able to select confidential. Please speak to court staff before selecting confidential because your filing may be rejected.

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Optional Services and Fees (Optional)

Unless you need something like certified copies of judgments, a jury demand, or an alias summons, you do not have to do anything in this section.

1. Click **Add Optional Services and Fees** and look through the drop down menu to see what is offered.

2. Click on the Service you want. Be sure not to click anything you already selected in the Filing Code, or you may be charged twice.

3. If applicable, type the **number** of that service you want in the Enter a Quantity box.

4. Click **Save Changes**.
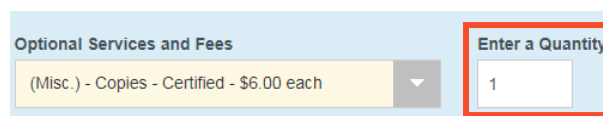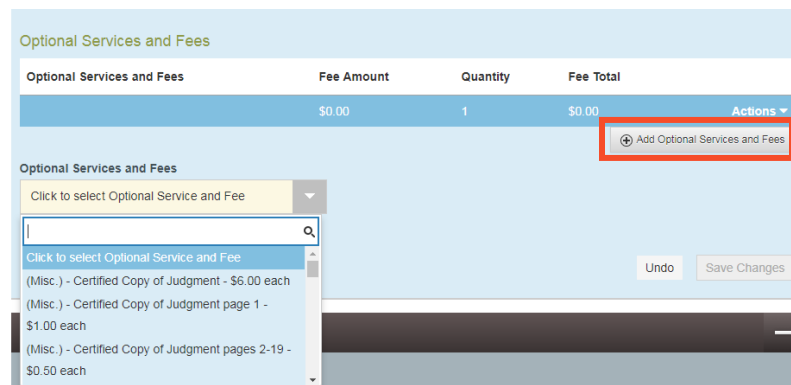
Upload Additional Lead Document

1. Add additional Lead Documents by clicking the **Add Another Filing**.

2. Follow the instructions above for Uploading another Lead Document.

3. Repeat for all Lead Documents in your case.
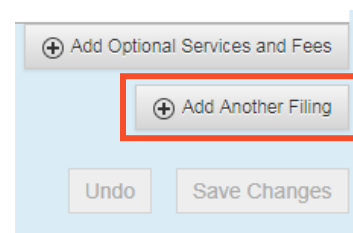
Service Contacts

After uploading your documents, if you see the Service Contacts box it means you selected Serve or EfileAndServe for the Filing Type.
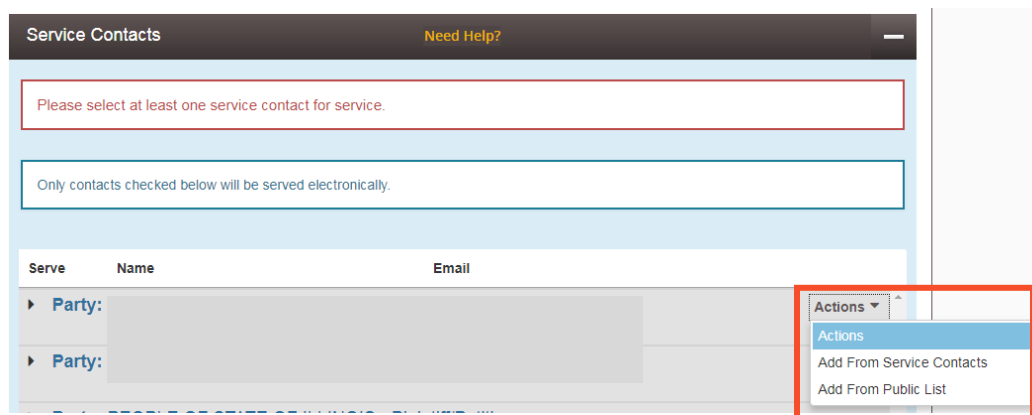
1. Click **Actions** next to the party you want to send email notice to. Note: this gives notice to the other side, but NOT qualify for service of process.

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2. Click on **Add from Service Contacts** or **Add From Public List** to find the email you want to send to.

3. If you find the email, Click on it.
   a. Click **Save Changes**.

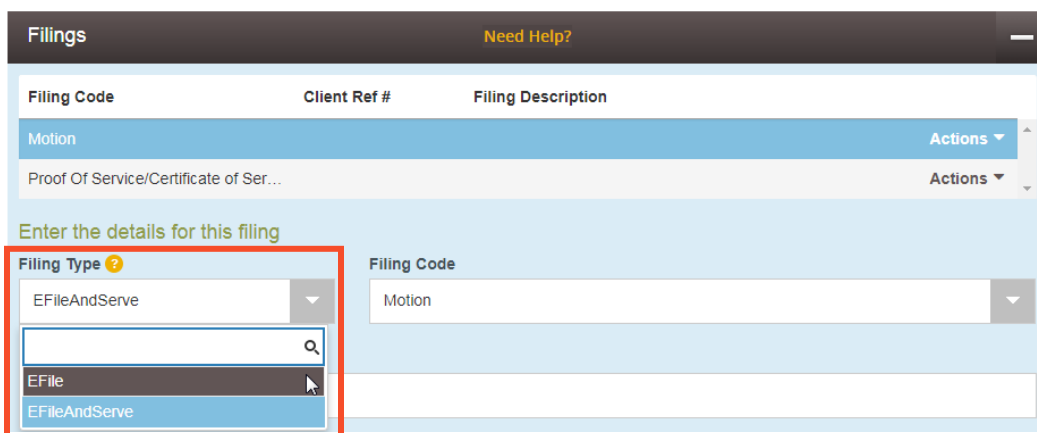4. If you get a message saying there are no contacts or no items to display, click **Close**.

Add From Service Contacts		✕
Name ⊛	Email	⊛
	There are no contacts in your firm master list	
		Close
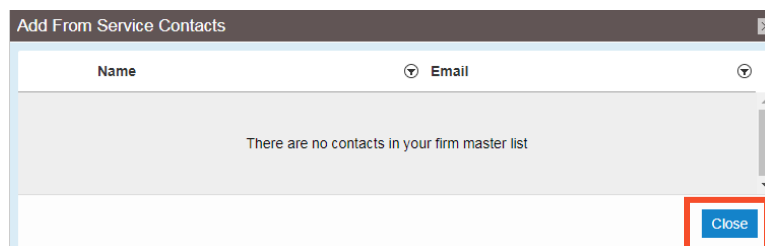
5. If you don't want to send anyone notice of the filing by email or if no contacts are listed, you can get rid of this section by going back to the Filings Section. You will see all of the Lead Documents you have uploaded.
   a. Click on the first **document**. It will now be shaded blue and the information about the document will open delow.
   b. Click on the dropdown menu for **Filing Type**.
   c. Change the Filing Type to **Efile**.
   d. Scroll down and click **Save Changes**.

Filings	Need Help?	—
Filing Code	**Client Ref #**	**Filing Description**
Motion		Actions ▼
Proof Of Service/Certificate of Ser…		Actions ▼

Enter the details for this filing

Filing Type ❓
EFileAndServe ▼
🔍
EFile
EFileAndServe

Filing Code
Motion ▼

   e. Click on the next document and change the Filing Type to Efile. Make sure all Lead Documents have just Efile as the Filing Type.

👍 **You have successfully uploaded your documents/completed the Filings section.**

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