


## How to Add a Party in a Representative Capacity to a Case when Electronically Filing the Case through Tyler Odyssey File & Serve

Representative capacities have three parts:

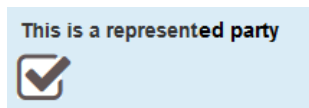
- First Part:**     **Representative** (Individual or Business)
- Second Part:**  **Represented Party** (Individual or Business)
- Third Part:**    **Capacity**

When you add a representative party in Tyler Odyssey File & Serve, you must add the **Representative** and **save it** before you add the **Represented Party** and **Capacity**. The Tyler application makes it appear that you are adding two separate parties when you are only adding one. Don't let this confuse you.

In the **Party Information** section, take these steps:

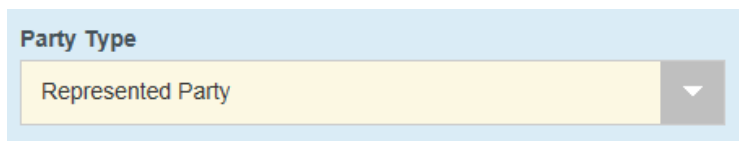
1. Add the **Representative** as a party to the case (plaintiff, defendant, petitioner, or another party type).
  - a. If the party is an individual, fill in the first and last name.
  - b. If the party is a business, check the box to indicate that it is a business and enter the name of the business.
  - c. Enter any optional fields.
  - d. Click the  button. It looks as if you have added a party, but you are not done.
2. Take the following steps to add the represented party, which will include the second and third parts (**Represented Party** and **Capacity**).

- a. Click the  button and take the steps below.
- b. Check the box labeled **This is a Represented Party**.




This is a represented party

- c. Notice that the Party Type changes to **Represented Party**.

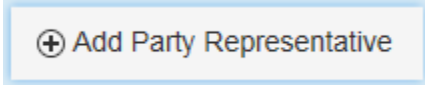


Party Type  
Represented Party

- d. If the represented party is a business, check the box labeled **Party is a Business/Agency**. Enter the **Represented Party** (individual or business), name and information, and click the  button.

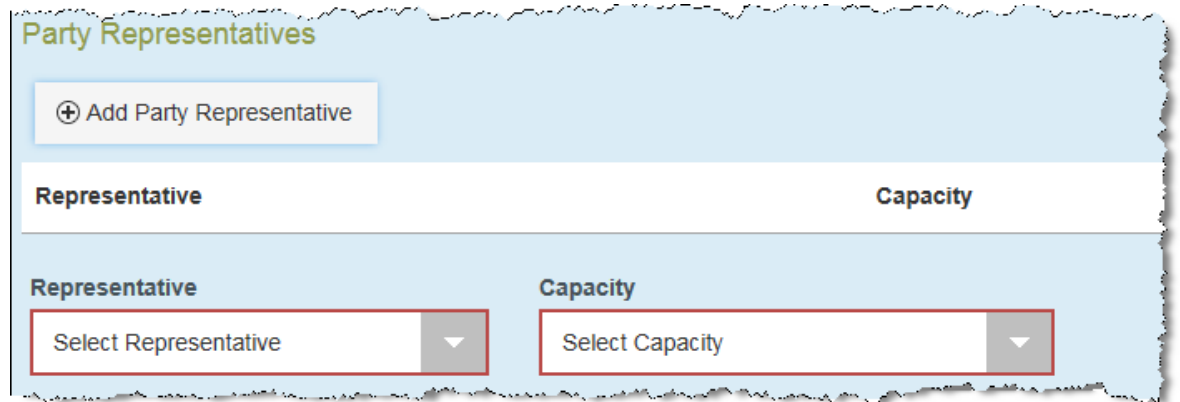
3. Take the following steps to add the details (the **Representative** and the **Capacity**).
  - a. Notice that the Tyler application has moved you to the **Filings** section. Don't let this confuse you. Scroll back up to the **Party Information section** and put your mouse on the **Represented Party** and click on it.

- b. Once you've opened the **Represented Party**, scroll down and click the

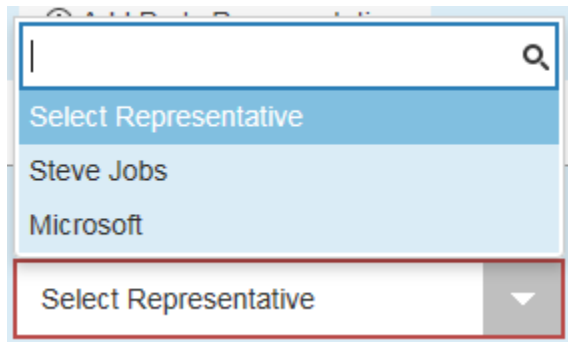


button.

You will see the **Representative** drop-down box and the **Capacity** drop-down box.



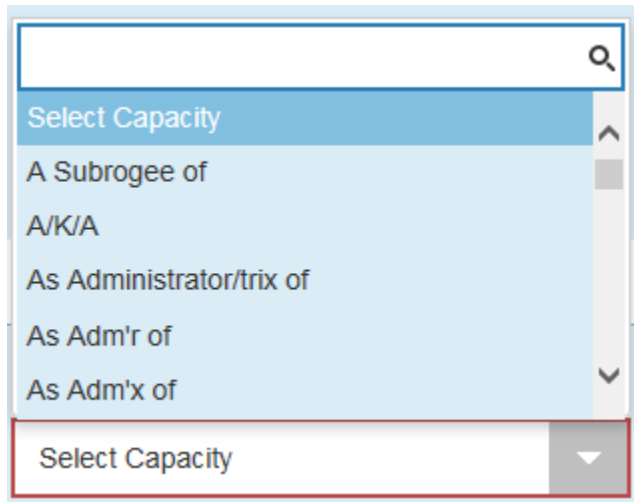
- c. For the representative, click the **Representative** down arrow.



You see a list of parties that you have added. Select the **Representative** party that you added in Step 1.

Quick Reference Card for Attorneys: Electronically Filing Cases that have Representative Capacities

- d. For the capacity, click the **Capacity** down arrow. Select the **Capacity** from the list.



- e. Click the **Save Changes** button.
- f. In the Party Information section, it looks like you have three parties, but two of them will be combined.

**Example**

The following screenshot shows the Party Information section of the Tyler Odyssey File & Serve Screen. The Party Information section does not show the capacity and it does not clarify which party is associated with the represented party. Do not let that confuse you.

It looks as if you have **three** parties: Steve Jobs, Microsoft, and Apple, Inc.

However, it will come through as **two** parties.



Figure 1. Party Information showing the Parties as they appear in the Tyler Odyssey File & Serve Application

The representative capacity is **Steve Jobs As officer of or agent for Apple, Inc.**

## Quick Reference Card for Attorneys: Electronically Filing Cases that have Representative Capacities

4. Finish filing the case. Once it gets transferred to the MassCourts Case Management System, two parties will show on the case.



The screenshot displays the 'Civil Anchor Screen' for case 1762SC000326, titled 'Steve Jobs As officer of or agent for Apple, Inc. v. Microsoft'. The interface includes navigation tabs for Functions, Reports, Codes, Identities, and Index. Below the case title, there are sections for Case Information and Party Information.

**Case Information:**

File Date	03/06/2017	Case Status	Pending	Case Status Date	03/06/2017
Case Disposition	.....	Case Disposition Date		Case Judge	
Category	EFiled Case	Action	Small Claim \$2001-\$5000	Session	
Track					

**Party Information: 2** (Add)

Party Name Party Alias(es)	Party Type	Party Role	Attorney(s)
Steve Jobs As officer of or agent for Apple, Inc.	Plaintiff		
Microsoft	Defendant		

Figure 2. Parties in the MassCourts Case Management System

### Party as both Individual and Representative

If you use a party entry as a **Representative**, the party will not be entered as an individual party.

If the filing includes the party both as a representative and an individual, you must enter the party name and information a second time.

For example, if you've entered Steve Jobs as a **Representative**, and you want Steve Jobs entered as an individual party as well, you must click the "Add Another Party" button, and again add party information for Steve Jobs as a Plaintiff. Steve Jobs will appear twice on the Party Information Screen.