

STARTING A NEW CASE

A filing through the Odyssey File & Serve is called an "envelope." An envelope can contain more than one document.

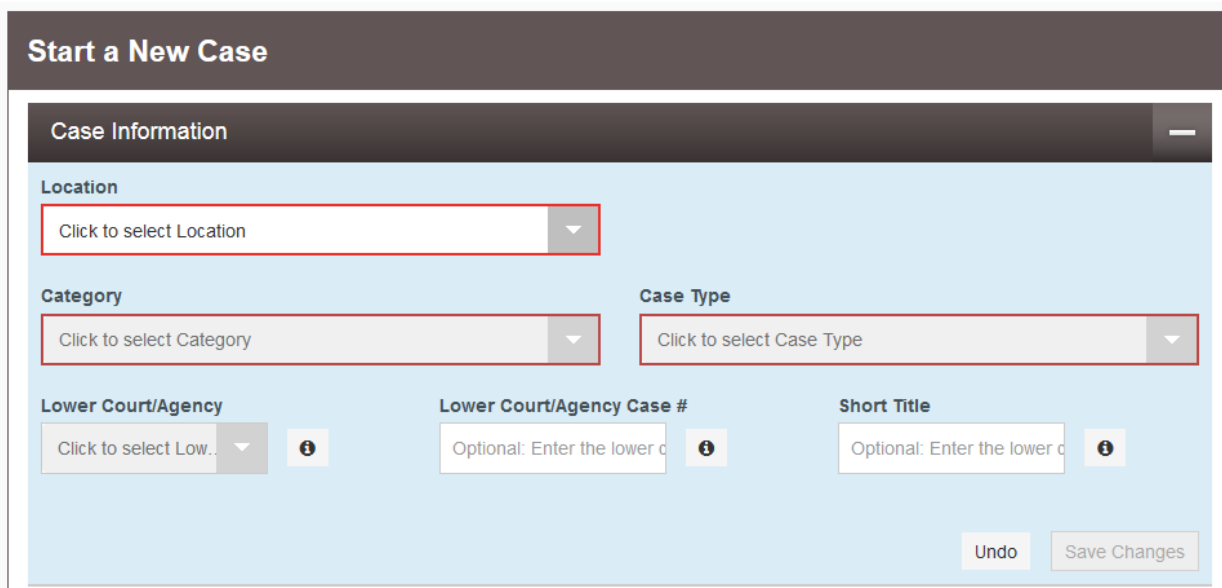
When you enter a new appeal, however, you can *only* file a civil appeal entry form. A separate form must be completed for *each* appellant. If there are multiple forms for multiple appellants, they should be submitted in a single envelope. You can download the form from the Appeals Court website at: <http://www.mass.gov/courts/court-info/appealscourt/efiling-appeals-faq-gen.html>

1. On the screen that displays when you first sign in, click the blue "Start a New Case" button:



The screenshot shows the 'Filer Dashboard' interface. On the left, under 'My Filing Activity', there is a list of status categories: Pending, Accepted, Returned, Drafts, and Served, with a 'View All' link at the bottom. On the right, under 'New Filing', there are two main buttons: 'Start a New Case' (highlighted with a red box) and 'File into Existing Case'. A link 'Use a Template' is also present. At the bottom of the 'New Filing' section, there is a link 'Need help getting started?'.

2. The first section of your filing envelope is the "Case Information" section:



The screenshot shows the 'Start a New Case' form. The 'Case Information' section is highlighted with a dark header. It contains several input fields: 'Location' (a dropdown menu), 'Category' (a dropdown menu), 'Case Type' (a dropdown menu), 'Lower Court/Agency' (a dropdown menu), 'Lower Court/Agency Case #' (a text field with a hint 'Optional: Enter the lower c'), and 'Short Title' (a text field with a hint 'Optional: Enter the lower c'). There are also 'Undo' and 'Save Changes' buttons at the bottom right.

Required Fields:

Location: This is the court you are submitting your filing to. Select "Appeals Court."

Category: This is the type of case (e.g., panel, single justice, civil, criminal). Presently, only civil panel cases are available for e-filing. Select "Appeals Court Panel Cases - Civil" from the dropdown (it is the only option).

Case Type: Select the type that most closely describes the case being appealed from the drop down list.

Optional Fields:

Lower Court/Agency: Select the court or agency the appeal is being taken from.

Lower Court/Agency Case #: Enter the case number assigned by the lower court to the case being appealed.

Short Title: Enter the lower court/agency case title (e.g., Smith v. Jones)

Start a New Case

Case Information

Location

Appeals Court

Category

Appeals Court Panel Cases - Civil

Case Type

Contract dispute

Lower Court/Agency

* Superior Court, M.

Lower Court/Agency Case #

1422CV02278-C

Short Title

Jones v. Smith

Undo

Save Changes

Party Information

Party Type	Party Name	Lead Attorney
There are no parties		

+ Add Another Party

When you have entered the required information (and optional information if you so choose), click the blue "Save Changes" button.

3. The Party Information section of the envelope, directly below the Case Information section, will then become active. The envelope will be given a draft number, and any short title you have provided will appear at the head of the page.

Draft # 5132 - Jones v. Smith

Case Information +

Party Information -

Party Type	Party Name	Lead Attorney	Actions
<div>Enter details for this Party</div> <div>Party Type Click to select Party Type</div> <div>Party is a Business/Agency <input type="checkbox"/></div> <div>Lead Attorney Click to select Lead Attorney</div> <div>First Name <input type="text"/></div> <div>Middle Name <input type="text"/></div> <div>Last Name <input type="text"/></div> <div>Suffix <input type="text"/></div> <div>Country United States of America</div> <div>Address Line 1 <input type="text"/></div> <div>Address Line 2 <input type="text"/></div>			

Fill out the information in this section *for each party in the case*.

Required Fields:

Party Type: From the dropdown, select the party type that best describes the role of the party in the appeal.

Business/Agency Checkbox: If the party is a business or an agency, check this box.

If this box is checked, the name fields below change to "Business name":

Party Name/Business Name: Enter the name of the party or the business that you represent

Enter details for this Party

Party Type
Defendant/Appellant

Party is a Business/Agency
☒

Lead Attorney
Click to select Lead Attorney

Business Name

Optional Fields:

Lead Attorney: This dropdown contains a list of all attorneys that have been added to your firm (see separate guide for directions on how to add attorneys to your firm account).

For the party you represent, select the attorney who is lead on this case. *Though there is a "Pro Se" option, do not select it. Pro se filings are not accepted via e-filing at this time.*

If more than one attorney will be working on this case, use the "Add Attorney" Button" to add more attorneys to the case:

Enter details for this Party

Party Type: Defendant/Appellant ☐ Party is a Business/Agency

Lead Attorney: Tiffany Knapp

Additional Attorneys

First Name: Middle Name: Last Name: Suffix:

Add Attorney

For all other parties (e.g., opposing parties), selecting counsel is not necessary.

Address fields: Fill in the address of *that party*.

Party Type: Defendant/Appellant ☐ Party is a Business/Agency

Lead Attorney: Tiffany Knapp

Additional Attorneys

First Name: John Middle Name: M Last Name: Smith Suffix:

Country: United States of America

Address Line 1: 146 Blue Lane Address Line 2:

City: Somerville State: Massachusetts

Zip Code: 02145 Phone Number: Ex: 1234567890

Undo Save Changes

When all required fields are completed, click the blue "Save Changes" button.

To add a second (or third, fourth, etc.) party, click the "Add Another Party" button:

Draft # 5132 - Jones v. Smith

Case Information +

Party Information -

Party Type	Party Name	Lead Attorney	Actions
Defendant/Appellant	John M Smith	Tiffany Knapp	⊕ Add Another Party

Filings -

Enter the details for this filing

Filing Type: EFile

Filing Code: Click to select Filing Code

Fill in the information for all remaining party as you did for the first party. Click "Save Changes" after each party.

Once the first party is entered, the Filings section of the envelope becomes active:

Case Information +

Party Information -

Party Type	Party Name	Lead Attorney	Actions
Defendant/Appellant	John M Smith	Tiffany Knapp	⊕ Add Another Party
Plaintiff/Appellee	Mary L Jones		

Filings -

Enter the details for this filing

Filing Type: EFile

Filing Code: Click to select Filing Code

Filing Description: Optional: Enter the name of the document you are filing.

Move on to this section when you have submitted all party information.

4. The filings section of the envelope is where you upload documents to submit to the court.

The screenshot shows a web interface titled "Filings". Below the title is a section "Enter the details for this filing". It contains several input fields and buttons:

- Filing Type:** A dropdown menu with "EFile" selected.
- Filing Code:** A dropdown menu with the text "Click to select Filing Code".
- Filing Description:** A text input field with the placeholder text "Optional: Enter the name of the document you are filing."
- Reference Number:** A text input field with the placeholder text "Optional: Enter your client billing code or firm tracking number if app".
- Filing Comments:** A text input field with the placeholder text "Optional: Any comments for court clerks".
- Courtesy Copies:** A text input field with the placeholder text "Optional: Enter multiple email addresses to".
- Related Parties:** A dropdown menu with the text "Click to select Related Parties".

At the bottom right of the form are two buttons: "Undo" and "Save Changes".

For case initiation purposes, the document you need to upload is a Civil Appeal Entry Form. One of these forms must be submitted *for each appellant* you represent.

Required Fields:

Filing Code: From this drop down, select the document you wish to submit to the court. For case initiation, the only option is a Civil Appeal Entry Form. It is listed with the \$300.00 civil case entry fee.

Related Parties: The related party is the party the document is being submitted on behalf of (your client).

Lead Document: Upload the document to be submitted to the court (the Civil Appeal Entry Form). Only PDF documents are accepted by the system.

Optional Fields:

Filing Description: The name of the document being filed.

Reference Number: This is for a client billing code or internal tracking number, if applicable. This is for your internal firm use.

Filing Comments: This field is for any comments you wish for the clerk to see with your filing when it is being reviewed.

Courtesy Copies: Enter the email address of any person you wish to receive a courtesy copy of this filing. They will receive an email notifying them upon court's acceptance and containing a link to download your e-filed document.

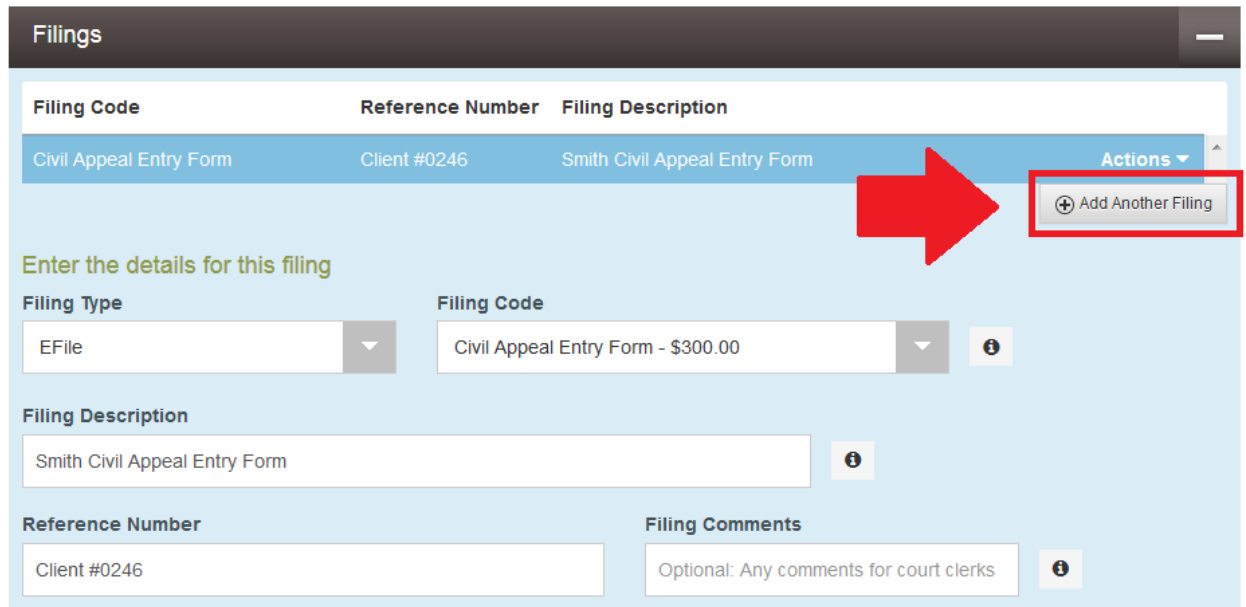
Description: When a document is uploaded, a Description field appears below the document. Enter a description of the document here if you would like.

This screenshot shows a portion of a web application interface. At the top, under the heading "Related Parties", there is a dropdown menu with "John M Smith" selected. Below this, under the heading "Lead Document (Required)", a document titled "Civil Appeal Entry Form.pdf" (592.21 KB) is displayed. Directly beneath the document name is a text input field labeled "Description" containing the word "Optional". This "Description" field is highlighted with a red rectangular border. At the bottom right of the section are two buttons: "Undo" and "Save Changes".

When all of the information is properly entered, click the blue "Save Changes" button

This screenshot displays the full "Filings" form. The header "Filings" is in a dark bar. The main section is titled "Enter the details for this filing". It contains several fields: "Filing Type" (set to "EFile"), "Filing Code" (set to "Civil Appeal Entry Form - \$300.00"), "Filing Description" (set to "Smith Civil Appeal Entry Form"), "Reference Number" (set to "Client #0246"), "Filing Comments" (set to "Optional: Any comments for court clerks"), "Courtesy Copies" (set to "jane.p.attorney@gmail.com"), and "Related Parties" (set to "John M Smith"). At the bottom, under "Lead Document (Required)", the same document "Civil Appeal Entry Form.pdf" is shown with its "Description" field set to "Optional". The "Save Changes" button at the bottom right is highlighted with a red rectangular border.

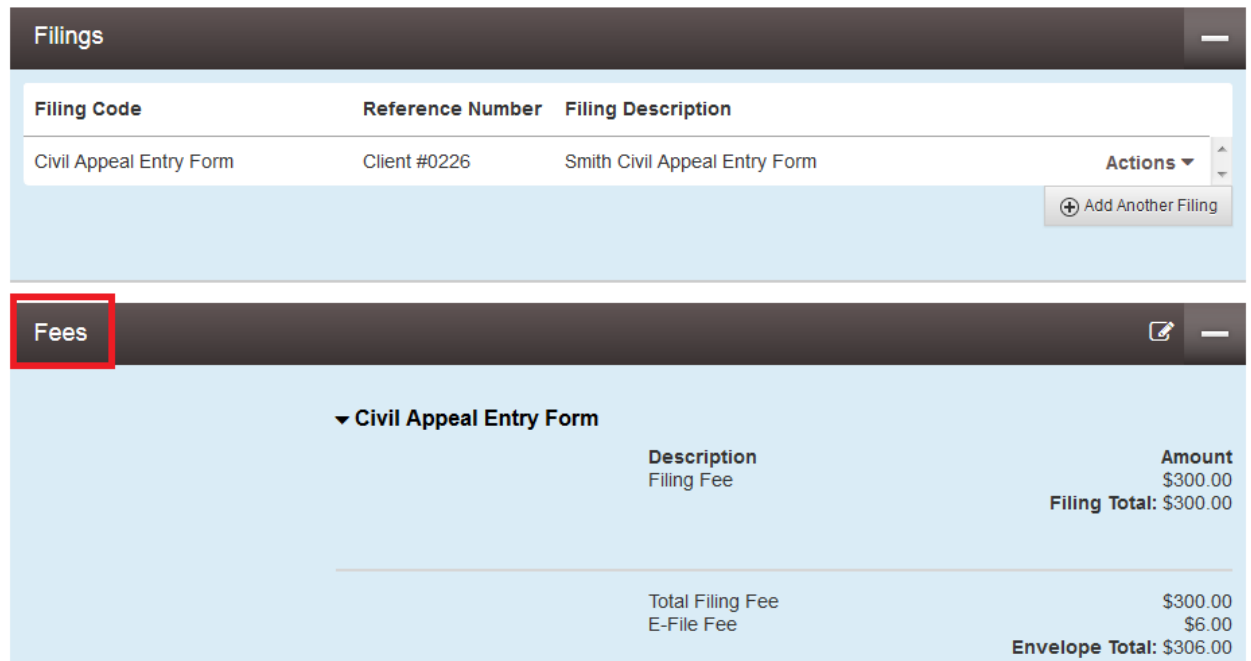
To enter more than one form for multiple appellants, click the "Add Another Filing" button near the top of the Filings section of your envelope:



The screenshot shows the 'Filings' section of a software interface. At the top, there is a table with columns: Filing Code, Reference Number, and Filing Description. The first row contains: Civil Appeal Entry Form, Client #0246, and Smith Civil Appeal Entry Form. To the right of this row is an 'Actions' dropdown menu, which has a red box around it and a red arrow pointing to it. The dropdown menu contains a button labeled '+ Add Another Filing'. Below the table, there is a section titled 'Enter the details for this filing'. This section contains several input fields: 'Filing Type' (set to EFile), 'Filing Code' (set to Civil Appeal Entry Form - \$300.00), 'Filing Description' (set to Smith Civil Appeal Entry Form), 'Reference Number' (set to Client #0246), and 'Filing Comments' (set to Optional: Any comments for court clerks). Each input field has an information icon (i) to its right.

Fill in all required information for each form, clicking "Save Changes" after each document.

5. When a filing is saved, the Fees section of the envelope becomes active:



The screenshot shows the 'Fees' section of a software interface. At the top, there is a table with columns: Filing Code, Reference Number, and Filing Description. The first row contains: Civil Appeal Entry Form, Client #0226, and Smith Civil Appeal Entry Form. To the right of this row is an 'Actions' dropdown menu, which has a red box around it and a red arrow pointing to it. The dropdown menu contains a button labeled '+ Add Another Filing'. Below the table, there is a section titled 'Fees'. The 'Fees' tab is highlighted with a red box. The section shows a table of fees for the 'Civil Appeal Entry Form'. The table has columns: Description and Amount. The first row contains: Filing Fee and \$300.00. The second row contains: Filing Total: \$300.00. Below this, there is a section titled 'Total Filing Fee' with a table showing: Total Filing Fee (\$300.00) and E-File Fee (\$6.00). The final row shows: Envelope Total: \$306.00.

Once you have added all of the documents you wish to submit to the court, continue to the fees section and fill in the fields.

Description	Amount
Filing Fee	\$300.00
Filing Total: \$300.00	
Total Filing Fee	\$300.00
Payment Service Fee	\$1.00
E-File Fee	\$6.00
Envelope Total: \$307.00	

Party Responsible for Fees

Click to select Party Responsible for Fees

Payment Account

Click to select Payment Account

Filing Attorney

Click to select Filing Attorney

Undo Save Changes

All of these fields are required.

Party Responsible for Fees: The party who is incurring the costs of filing. This is whoever you are filing the document on behalf of. If there is more than one appellant, just select the first appellant.

Payment Account: This dropdown lists all Payment Accounts associated with your firm (see separate guide on how to add payment accounts to your firm). Select the method of payment for the filing fees associated with this filing. *Do not* use a waiver account unless waiver of these court fees has already been approved.

Filing Attorney: The attorney who is filing the document. The dropdown populates from the list of your firm attorneys.

Once all of the information is filled in completely, click the "Save Changes" button.

Description	Amount
Filing Fee	\$300.00
Filing Total: \$300.00	
Total Filing Fee	\$300.00
Payment Service Fee	\$1.00
E-File Fee	\$6.00
Envelope Total: \$307.00	

Party Responsible for Fees

John M Smith

Payment Account

Master Card

Filing Attorney

Tiffany Knapp

Undo Save Changes

6. Once you have completed the Fee section and saved your changes, the Submission Agreements section becomes available:

The screenshot shows a light blue header area with a 'Filing Attorney' dropdown menu set to 'Tiffany Knapp'. Below this are 'Undo' and 'Save Changes' buttons. A dark grey bar with the text 'Submission Agreements' and a minus sign is highlighted with a red box. Below this bar are two checkboxes, both of which are unchecked. The first checkbox is labeled 'Did you remember to redact all confidential or impounded information?' and the second is labeled 'If you are filing into an existing case, did you remember to include a certificate of service?'.



Read both agreements through completely. The first box is required in all cases. The second is only required for subsequent filings. If the answer to the question is yes, check the box beside the agreement statement. If the answer is no, either restart the process with a redacted document or include a certificate of service with your envelope.


Note: Certificates of service are not required for case initiation. Just check the box.

7. When both submission agreements have been checked, press the Continue button to proceed to submit your envelope (there is a confirmation page before submission):

This screenshot shows the same 'Submission Agreements' section as the previous one, but now both checkboxes are checked. The first checkbox is labeled 'Did you remember to redact all confidential or impounded information?' and the second is labeled 'If you are filing into an existing case, did you remember to include a certificate of service?'. At the bottom of the form, there are two buttons: 'Save as Draft' and 'Continue'.

8. Review your envelope on the next page and ensure all of the information is complete and accurate:



 Actions ▾

Draft # 5132 - Jones v. Smith

Case Information

Location Appeals Court	Category Appeals Court Panel Cases - Civil	Case Type Contract dispute
Lower Court/Agency # * Superior Court, Middlesex County	Lower Court/Agency Case # 1422CV02278-C	Short Title Jones v. Smith
Firm Name Joe Attorney's Law Firm	Filed By Joe Attorney	

Party Information

Party Type	Party Name	Lead Attorney
Defendant/Appellant	John M Smith	Tiffany Knapp
Plaintiff/Appellee	Mary L Jones	

Filings

Filing Code	Reference Number	Filing Description
Civil Appeal Entry Form	Client #0226	Smith Civil Appeal Entry Form

Fees

▼ Civil Appeal Entry Form

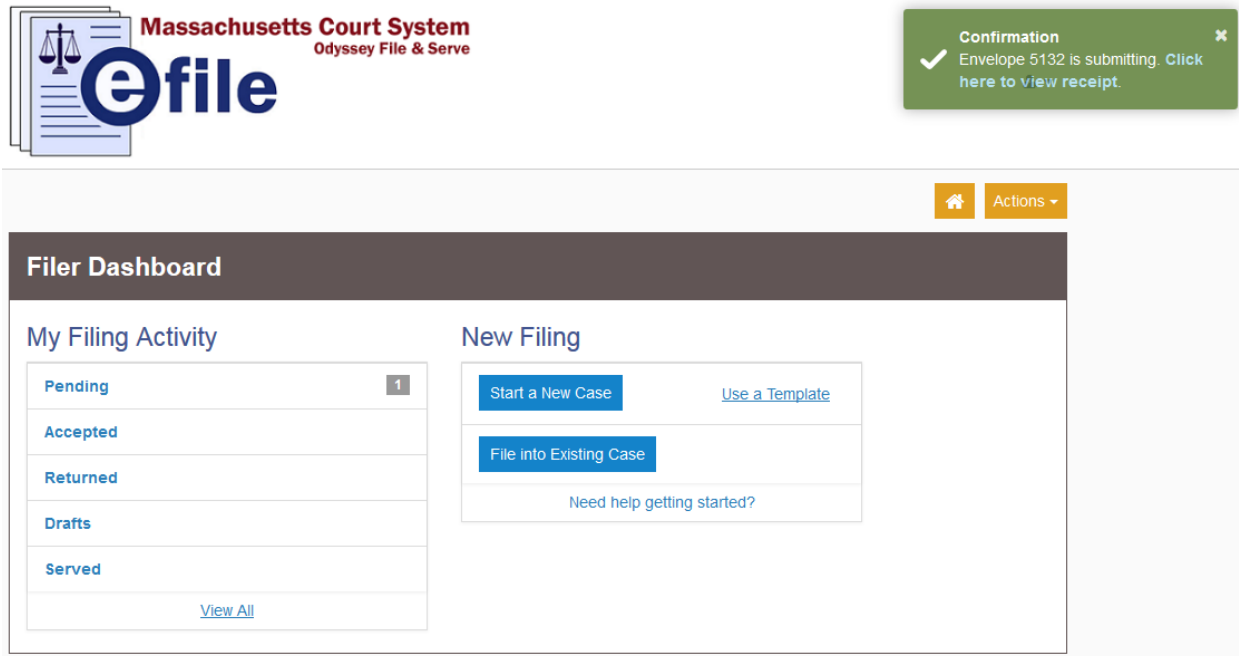
Description	Amount
Filing Fee	\$300.00
Filing Total:	\$300.00
<hr/>	
Total Filing Fee	\$300.00
Payment Service Fee	\$1.00
E-File Fee	\$6.00
Envelope Total:	\$307.00

Party Responsible for Fees	John M Smith
Payment Account	Master Card
Filing Attorney	Tiffany Knapp

[Back](#) [Submit](#)

If you need to make changes, click the "Back" button and make your corrections within the envelope.

When you are ready to submit your envelope, click the blue "Submit" button. The system will bring you back to the dashboard page with a confirmation notice at the top right of the screen indicating your envelope has been successfully submitted:



You can view your pending envelope by clicking the Pending tab on the dashboard. You will also receive an email confirmation of your submission to the court.

In addition, you will receive email notice when your submission is either approved or denied.

To review and/or print a receipt of your submission, click the link in the green confirmation notification in the top right of the screen (see image above). A sample receipt is on the next page.

Should you encounter any problems starting a new case in the system, and you are sure you have followed the previous steps correctly, please call Tyler Support at 1.800.297.5377

Please do not call the Clerk's Office with technical support related questions.

Envelope # 5132 - Jones v. Smith

Envelope Information

Envelope Id 5132	Submitted Date 3/4/2016 4:22 PM EST	Submitted User Name joe.attorney.firm@gmail.com
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Case Information

Location Appeals Court	Category Appeals Court Panel Cases - Civil	Case Type Contract dispute
Lower Court/Agency # * Superior Court, Middlesex County	Lower Court/Agency Case # 1422CV02278-C	Short Title Jones v. Smith
Firm Name Joe Attorney's Law Firm	Filed By Joe Attorney	

Filings

Filing Type EFile	Filing Code Civil Appeal Entry Form
Filing Description Smith Civil Appeal Entry Form	
Reference Number Client #0226	
Related Parties John M Smith	
Filing Status Submitted	

Lead Document

File Name	Description	Security	Download
Civil Appeal Entry Form.pdf			Original File

Fees

Civil Appeal Entry Form

Description	Amount
Filing Fee	\$300.00
Filing Total:	\$300.00

Total Filing Fee	\$300.00
Payment Service Fee	\$1.00
E-File Fee	\$6.00
Envelope Total:	\$307.00

Party Responsible for Fees	John M Smith	Transaction Amount	\$307.00
Payment Account	Master Card	Transaction Id	3488
Filing Attorney	Tiffany Knapp	Order Id	000005132-0
Transaction Response	Authorized		