MASSACHUSETTS APPEALS COURT GUIDE TO ELECTRONIC FILING PROCEDURE

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FIRM SET UP & ADMINISTRATION

FIRM USER GUIDES

SUBMITTING FILINGS

FIRM SET UP & ADMINISTRATION

REGISTERING A FIRM WITH MASSACHUSETTS ODYSSEY FILE & SERVE SITE

Before being able to file using the system, a firm account must be created for your law firm. Each lawyer in the firm may then be invited to join the firm account. Before you register for a Firm Account, check with your firm to ensure an account has not already been created for your firm and ensure you have permission to create such an account for the firm. If your firm has already created an account, ask your firm administrator to invite you to join the firm. Solo practitioners also still need to set up firm accounts. There is no ability to register an account simply as a lawyer; lawyers need to be associated with firm accounts.

There is no fee to register with Tyler. Fees for the use of the Tyler system are assessed on a per envelope basis.

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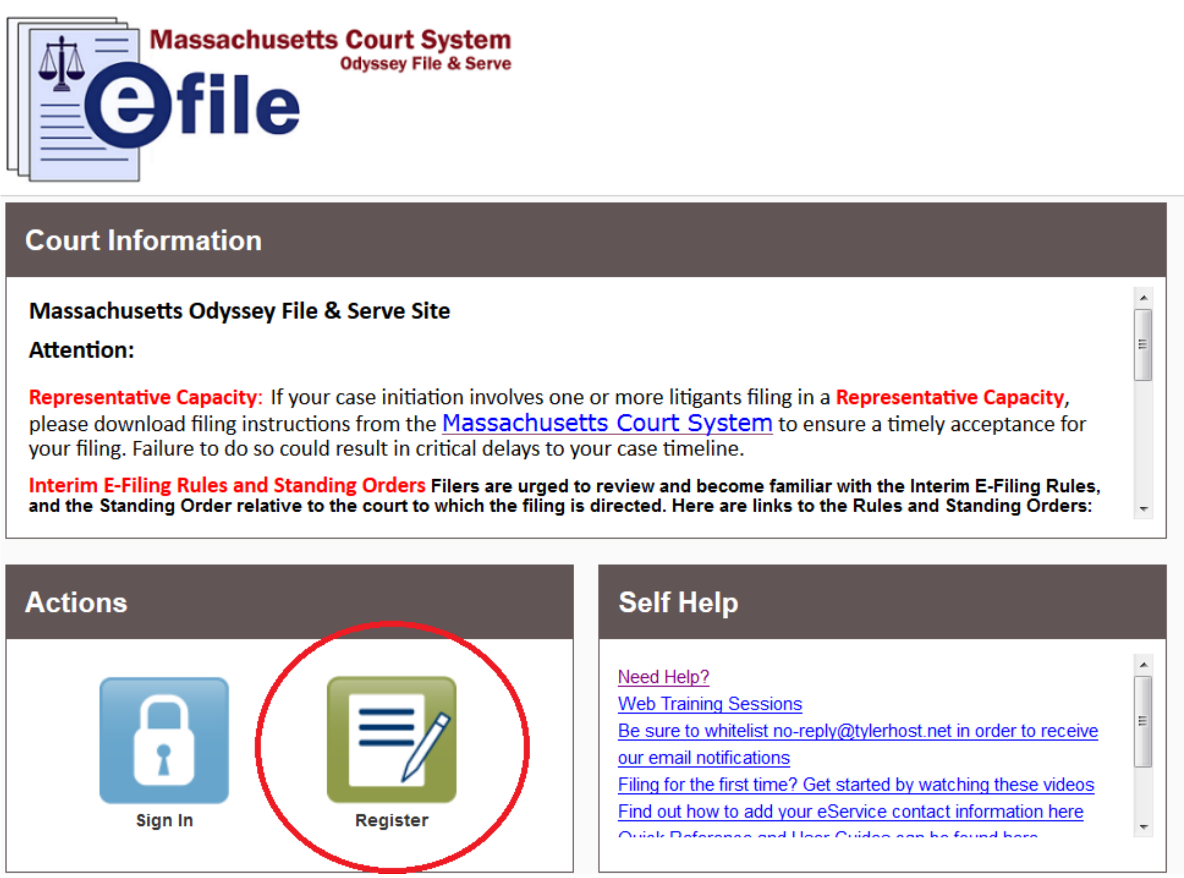
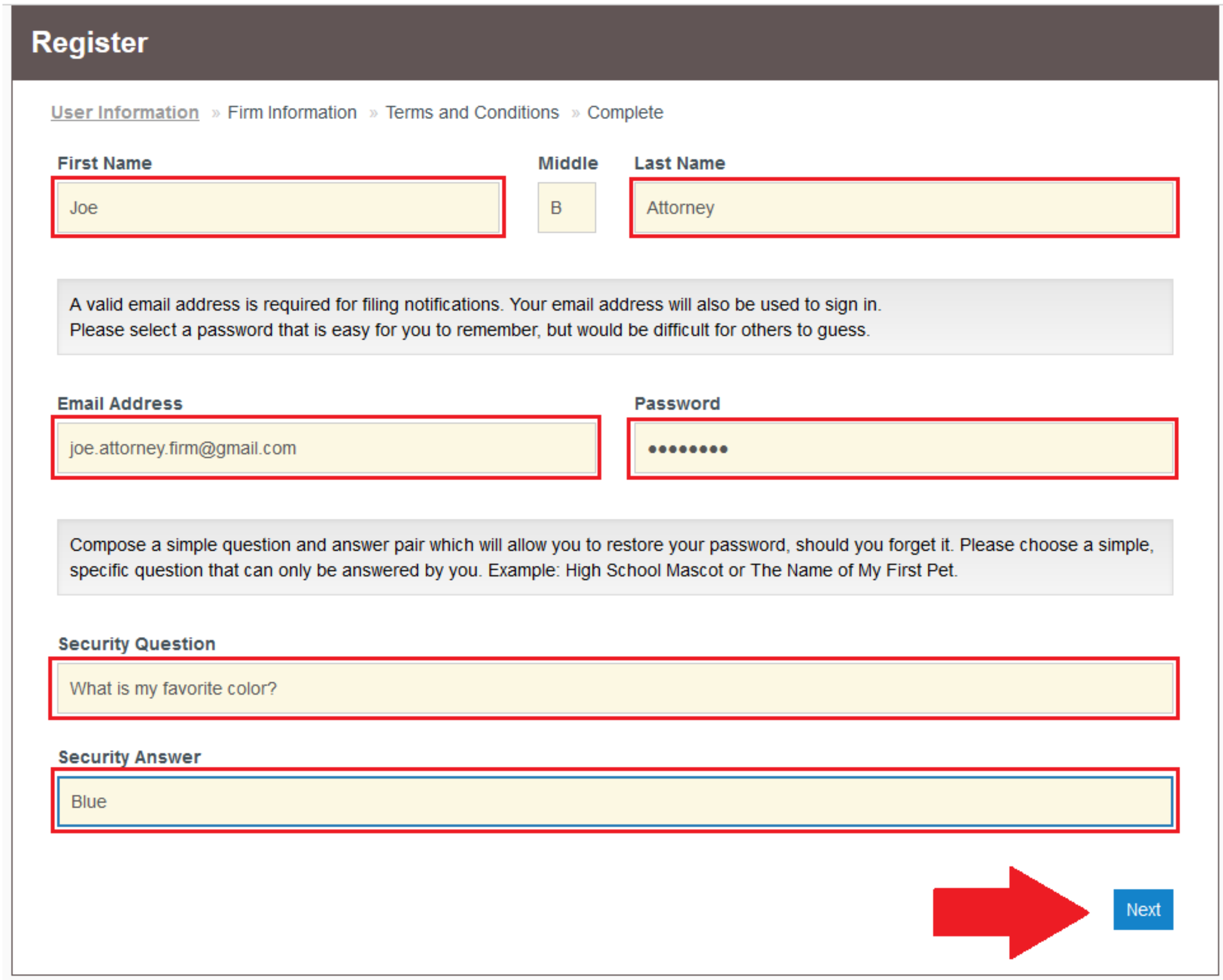
1. To begin setting up your firm's account, go to the Massachusetts Odyssey File & Serve Site at: https://efilema.tylerhost.net/ofsweb

2. Click the "Register" button

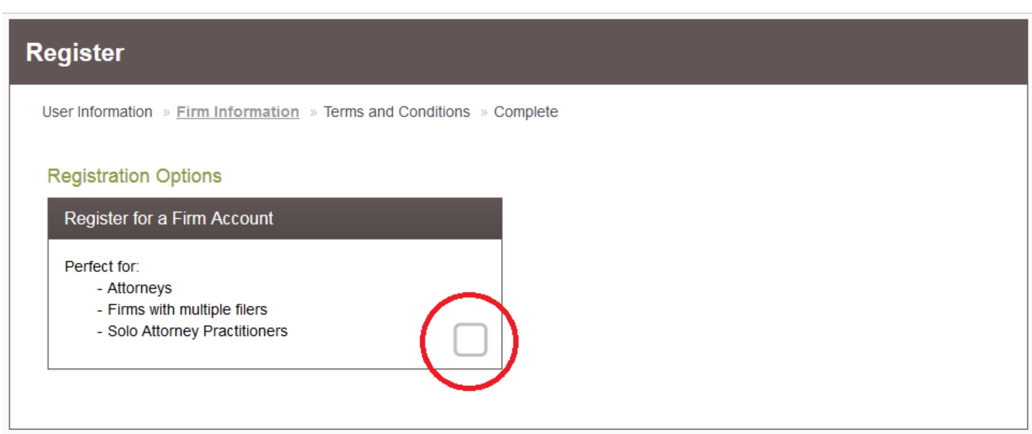


3. Fill in the information on the Register page. Those fields outlined in red are required to be filled.

When you have entered all the required information, click the "next" button on the bottom right side of the screen



4. On the next page, click the check box contained in the section "Register for a Firm Account"



5. Fill in the information for your firm. Fields outlined in red are required.

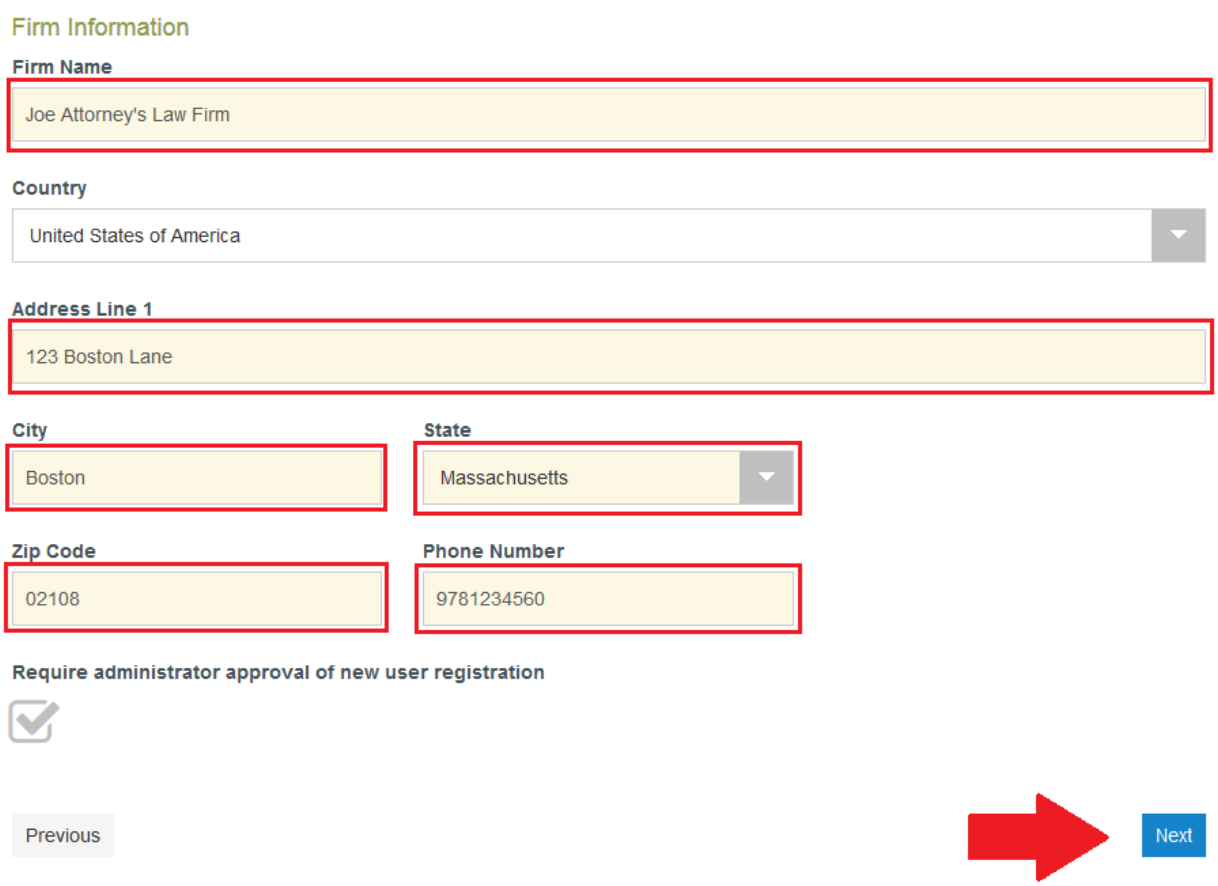
The check box to require administrator approval of new user registration is defaulted to checked.

This means that *even if you invite a user to join your firm*, you will have to manually approve them before they are able to file on behalf of your firm.

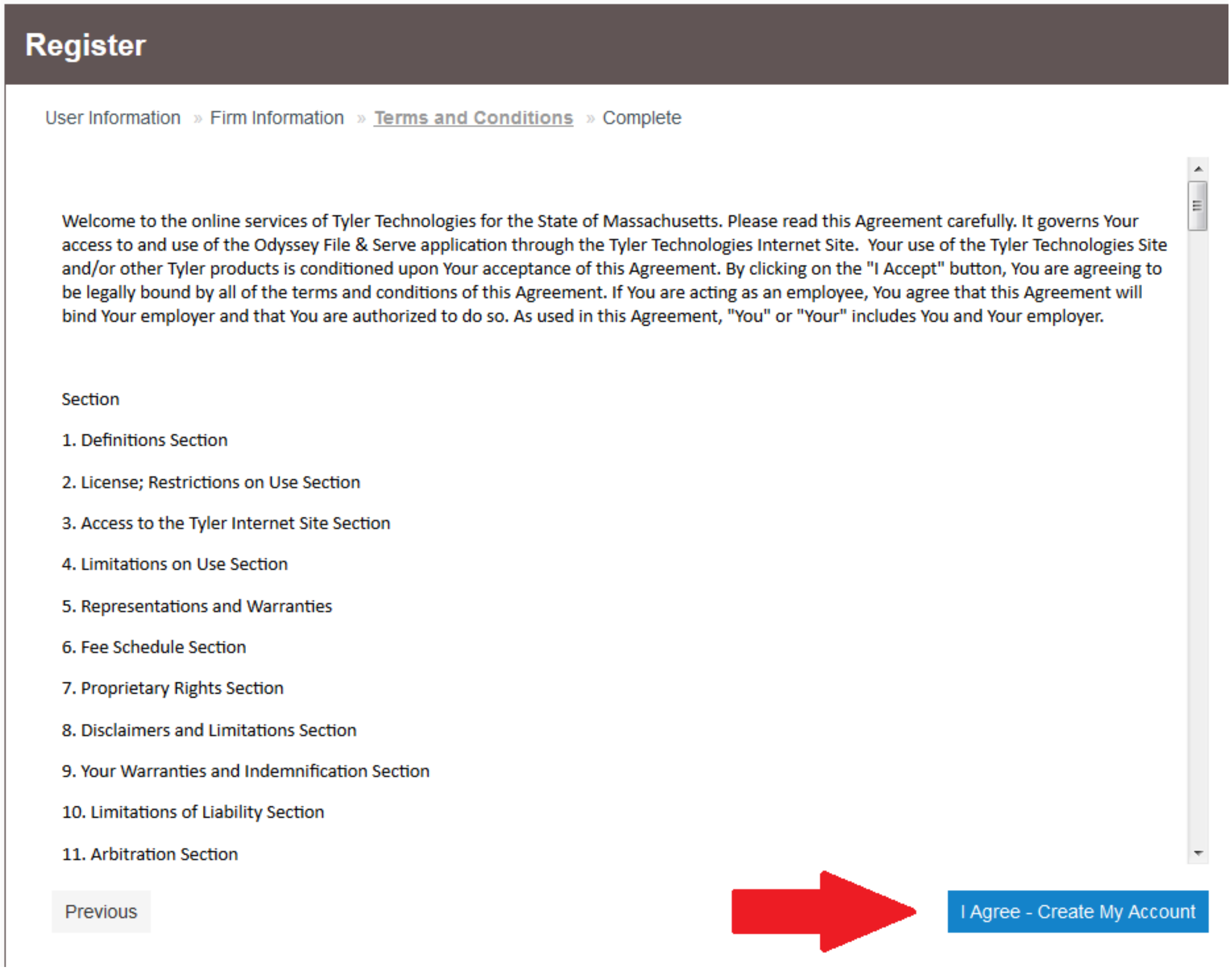
Users are able to join your firm if provided a link to do so (firm administrators are given the ability to share this link either via email or copying and pasting the link to share). There is no way to join a firm without this link; however, it is possible for this link to be shared outside of the firm (e.g., an email containing the link is forwarded).

If you want anyone to be able to automatically join your firm, uncheck this box. Otherwise, leave the box checked to require approval of users.

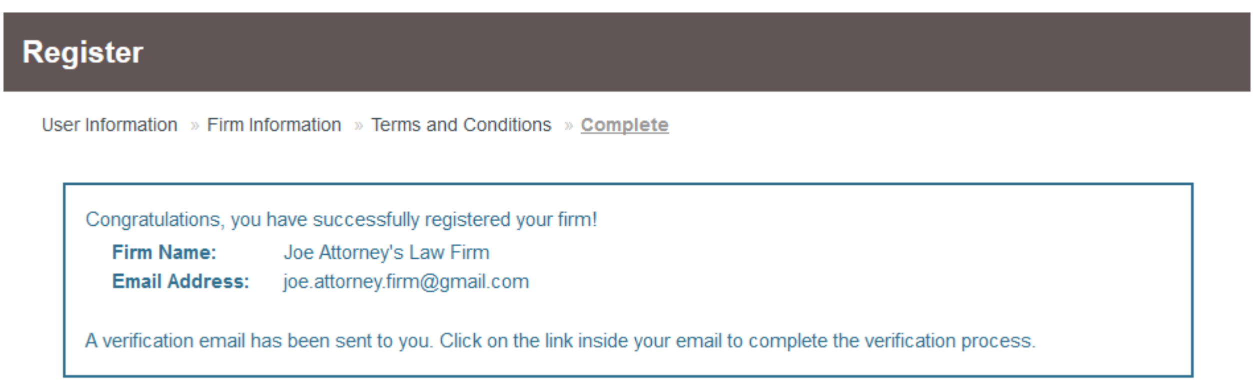
When finished, click the "Next" button.



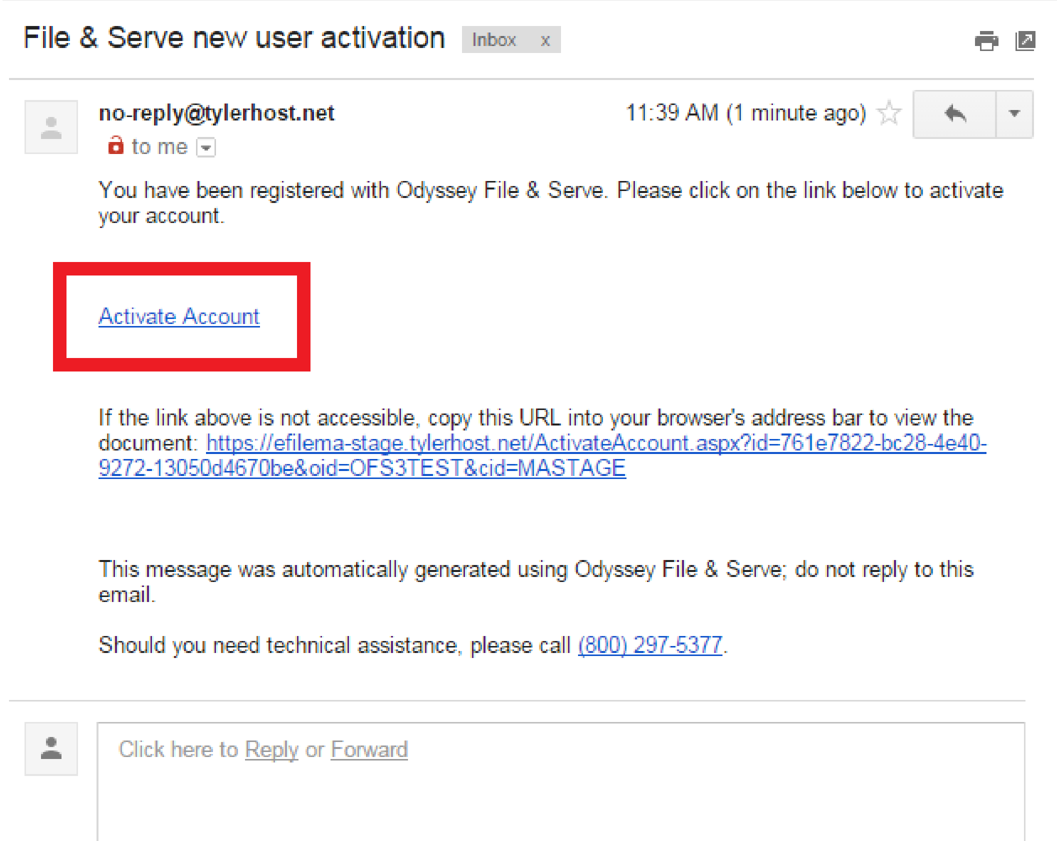
6. Read the Terms and Conditions for the system. If you agree to those conditions, click the "I Agree - Create My Account" button



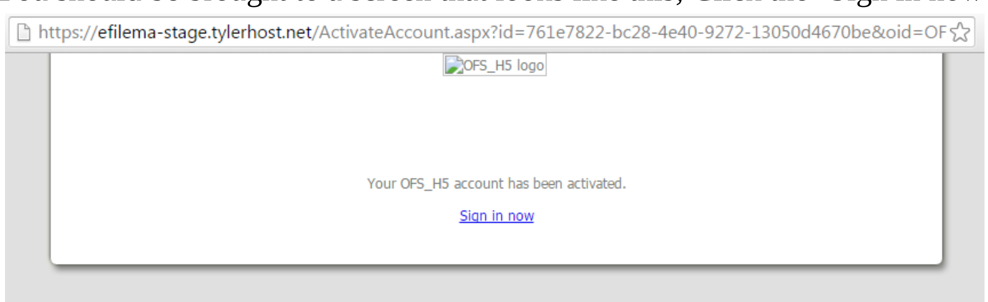
7. As instructed by the system, check the email you registered your firm under for a link to complete the verification process. **This email could be in your Spam folder. If you do not see the email within 5 minutes, check this folder.**



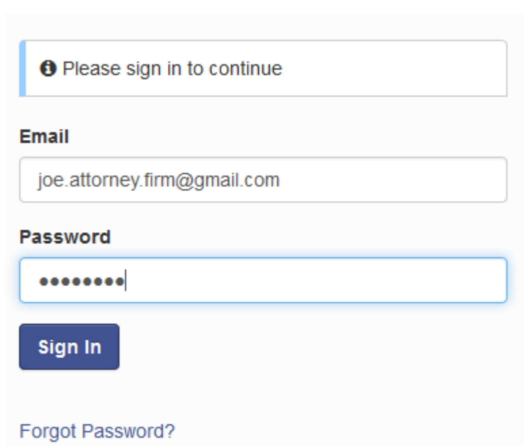
8. Click the link in the email from no-reply@tylerhost.net to activate your account



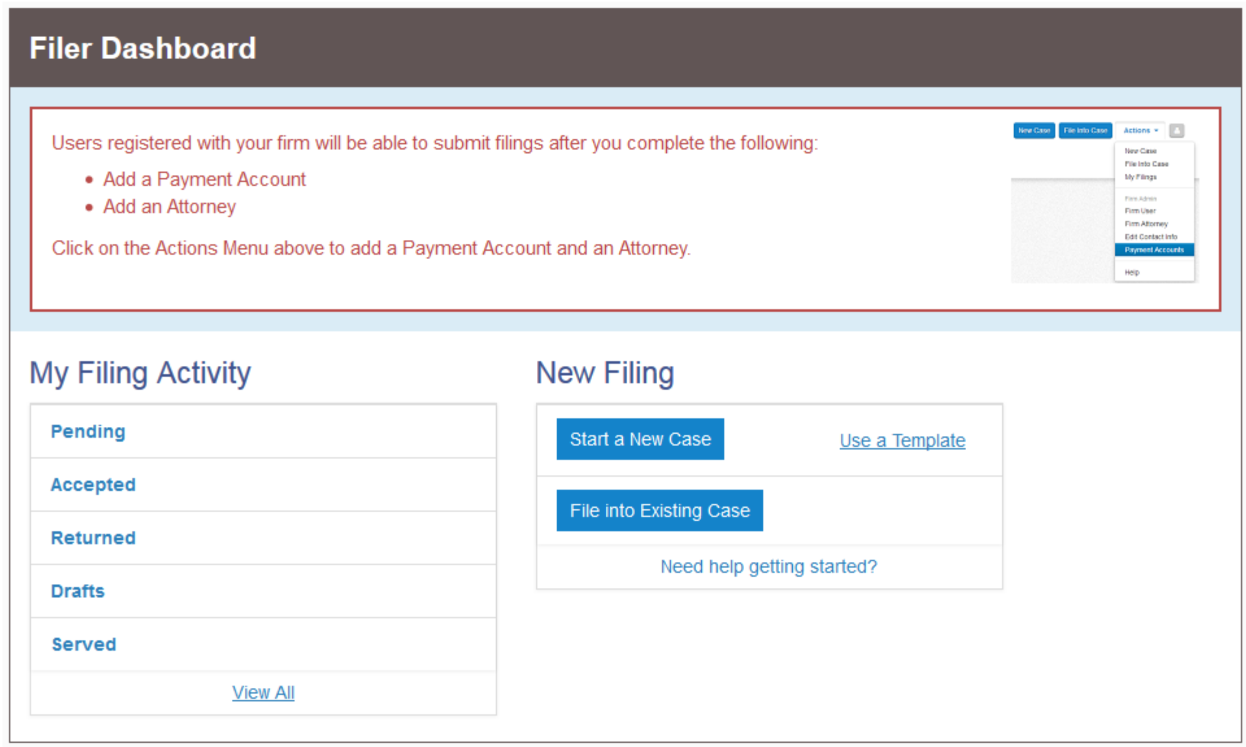
9. You should be brought to a screen that looks like this; Click the "Sign in now" link.



10. Enter the email and password you just used to set up your new account and click "Sign In":



11. Before you can proceed with filing, you must add an attorney *to your firm* and add a Payment Account to your firm. You can also invite users to join your firm (inviting lawyers within your firm to join as users *is not the same thing as adding lawyers to your firm account*). Please see separate user guides for step-by-step instructions on these steps.



Should you encounter any problems creating a firm account and you are sure you have followed the previous steps correctly, please call Tyler Support at 1.800.297.5377

<u>Please do not call the Clerk's Office with technical support related questions.</u>

ADDING FIRM ADMINISTRATORS TO YOUR FIRM

To give another user within your firm administrative privileges (which allows them to approve or deny new users, add firm attorneys, edit firm information (name, address, phone number, whether administrator approval is required for new user registration), and edit payment account information), make them a firm administrator.

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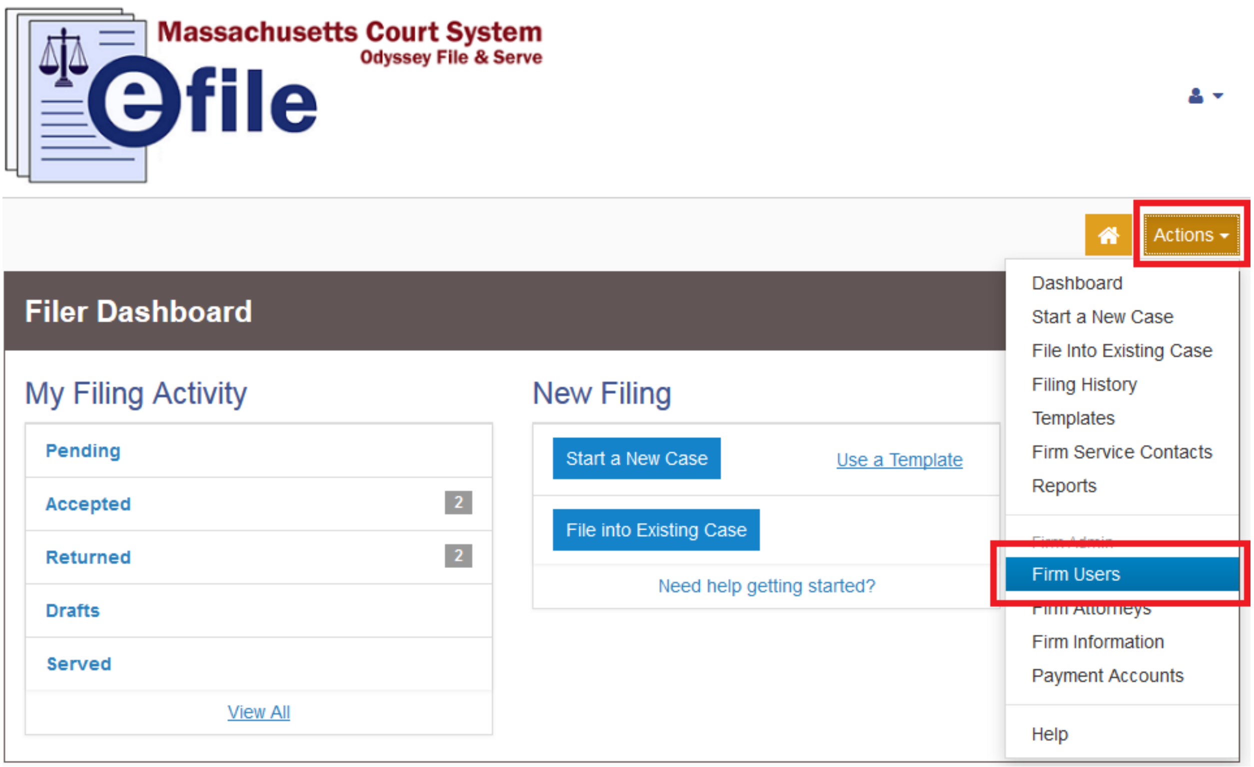
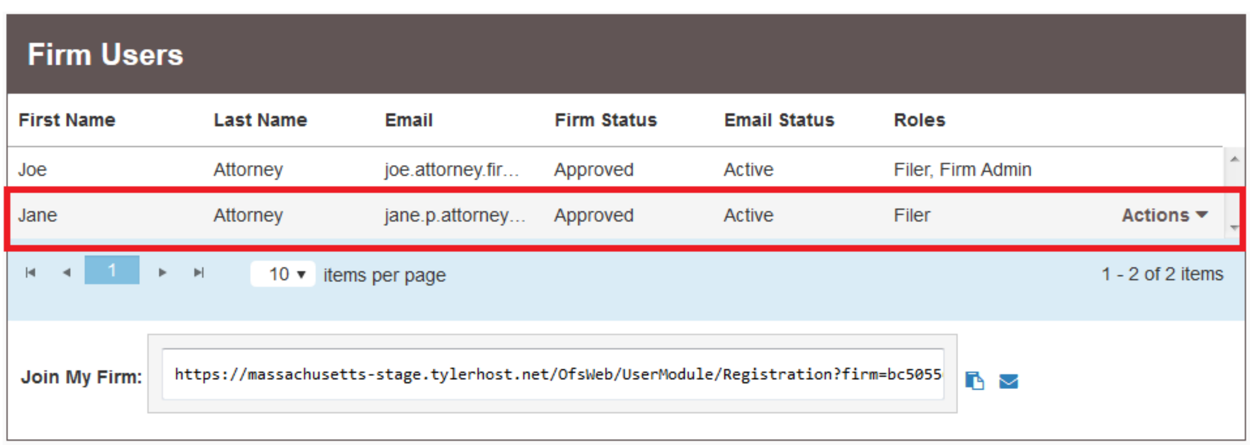
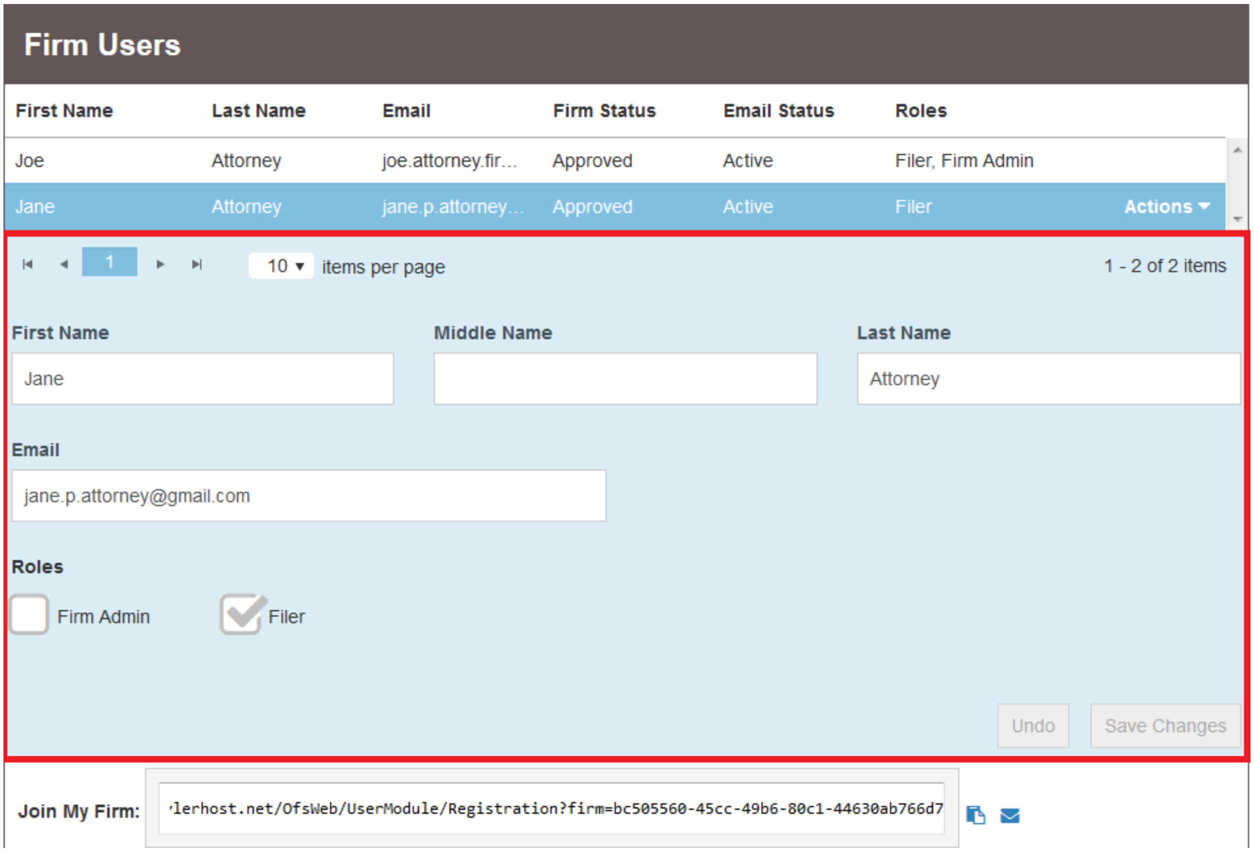
1. Click the orange "Actions" button. A drop down menu will appear. From this, select and click on "Firm Users"



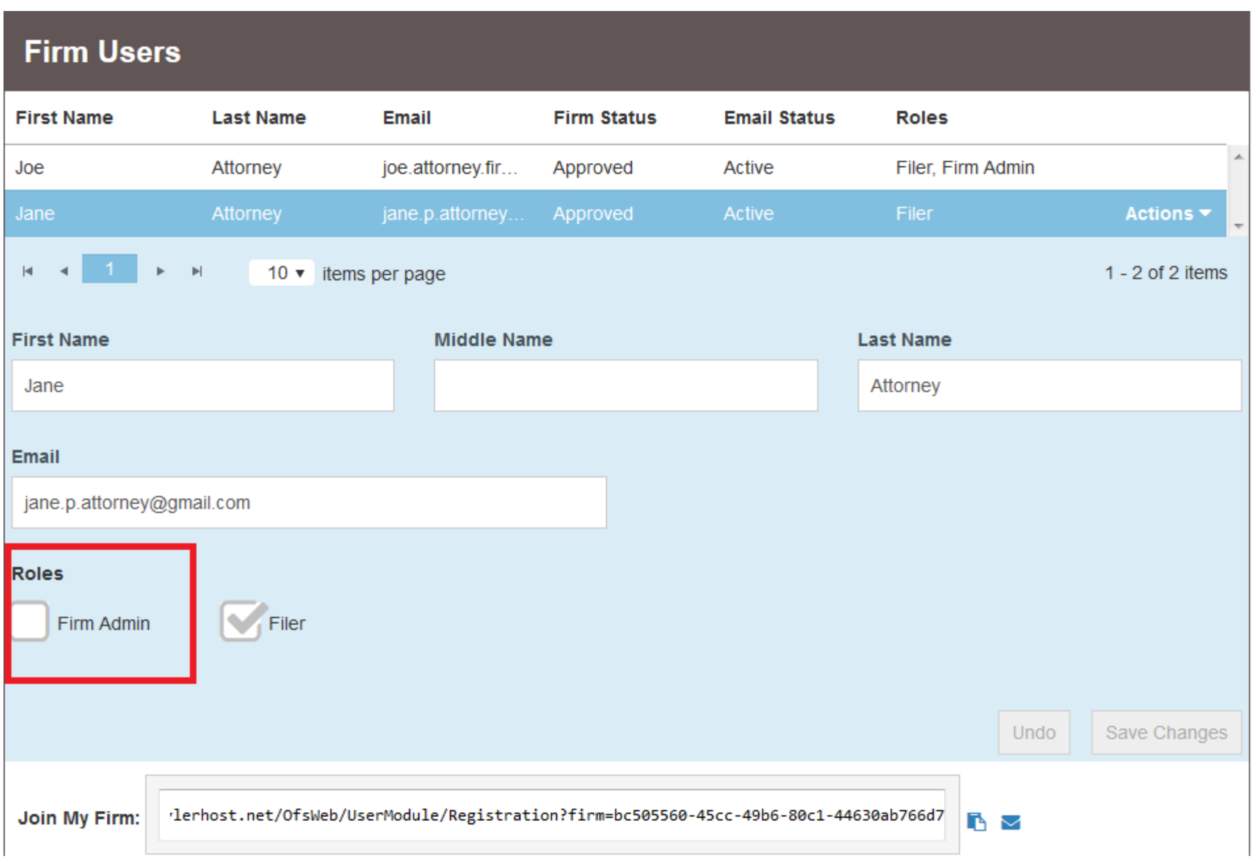
2. Click the firm user you want to give administrative privileges to:



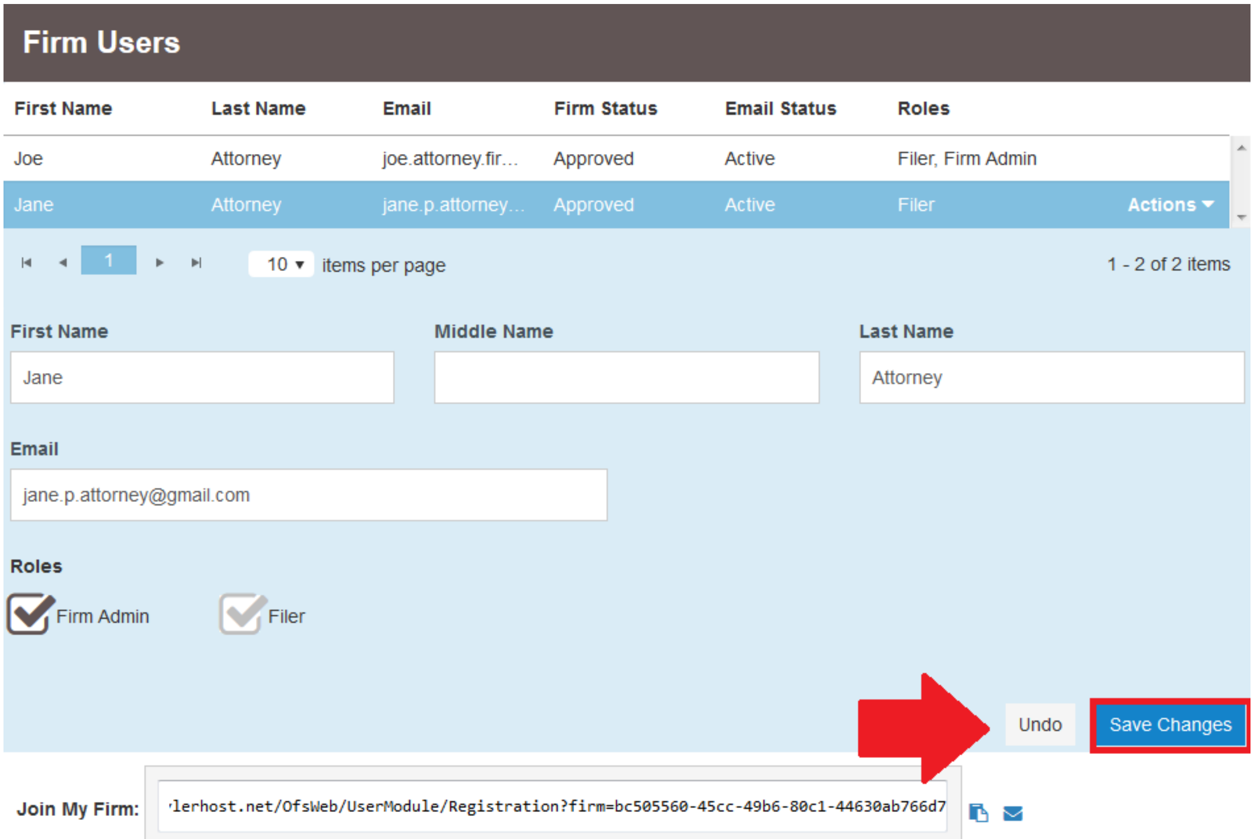
3. A box will appear at the bottom of the list of firm users containing information about the selected user:



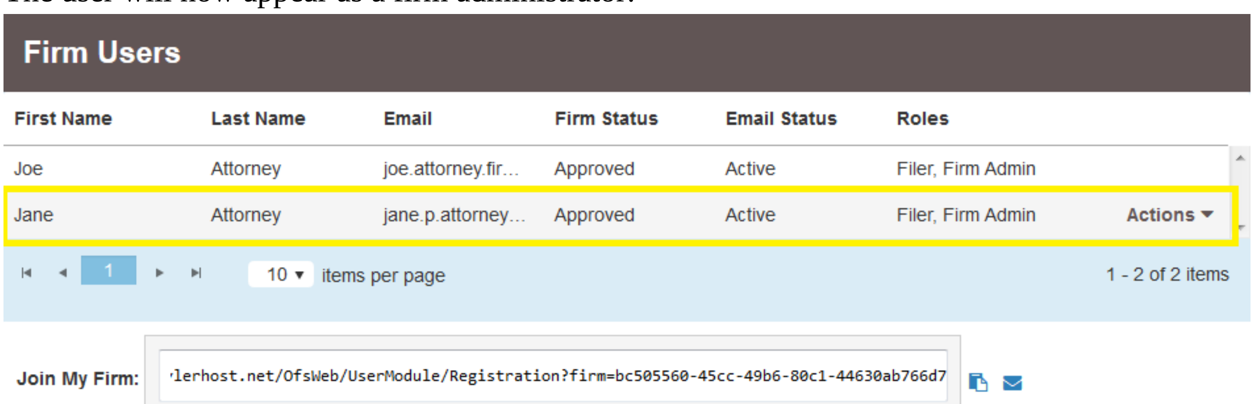
4. Check the "Firm Admin" checkbox under the "Roles" section of the user information:



5. Click "Save Changes"



6. The user will now appear as a firm administrator:



Should you encounter any problems giving a user firm administrator privileges and you are sure you have followed the previous steps correctly, please call Tyler Support at 1.800.297.5377

<u>Please do not call the Clerk's Office with technical support related questions.</u>

ADDING A PAYMENT ACCOUNT TO YOUR FIRM

Before you can file, there must be at least one payment account set up for your firm in your firm account. These enable the firm to pay related filing fees. There is an additional fee to use the system that is usually around $7. These fees are not processed unless the submitted document is accepted by the Clerk's Office.

There are three accounts options:

- Waiver accounts
  - For court fees that have been approved to be waived (e.g., when there has been a finding of indigency)
- Credit Cards
- eChecks
  - This allows drawing from a bank account much like a traditional check

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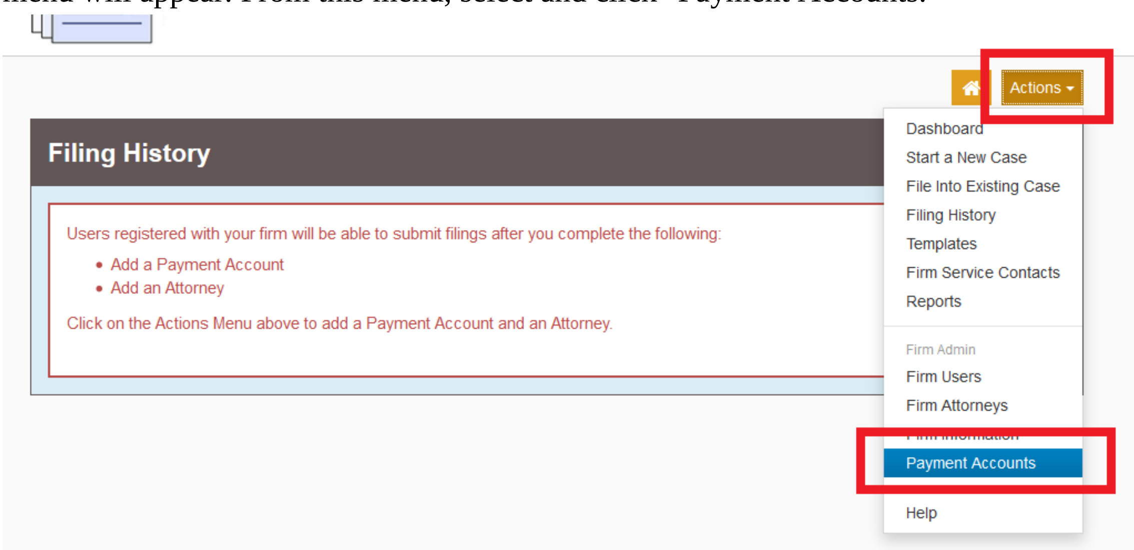
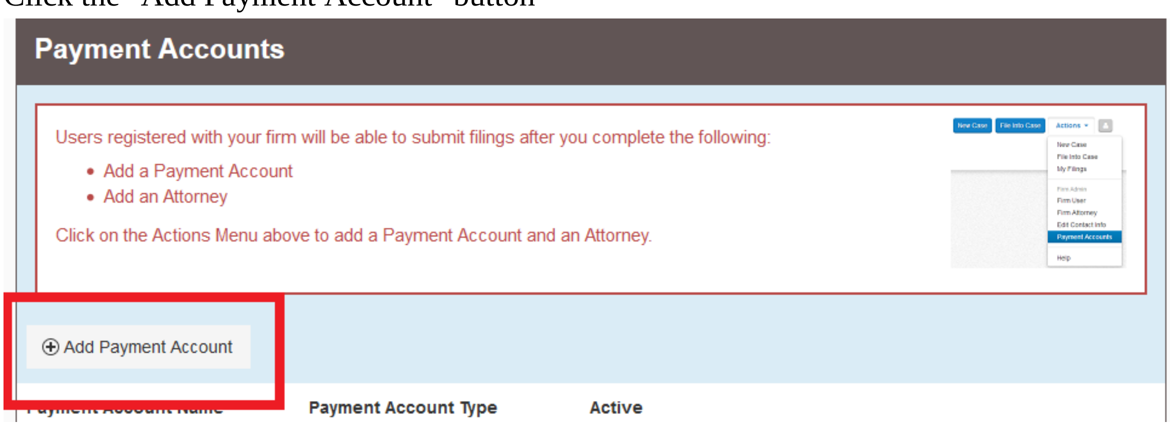
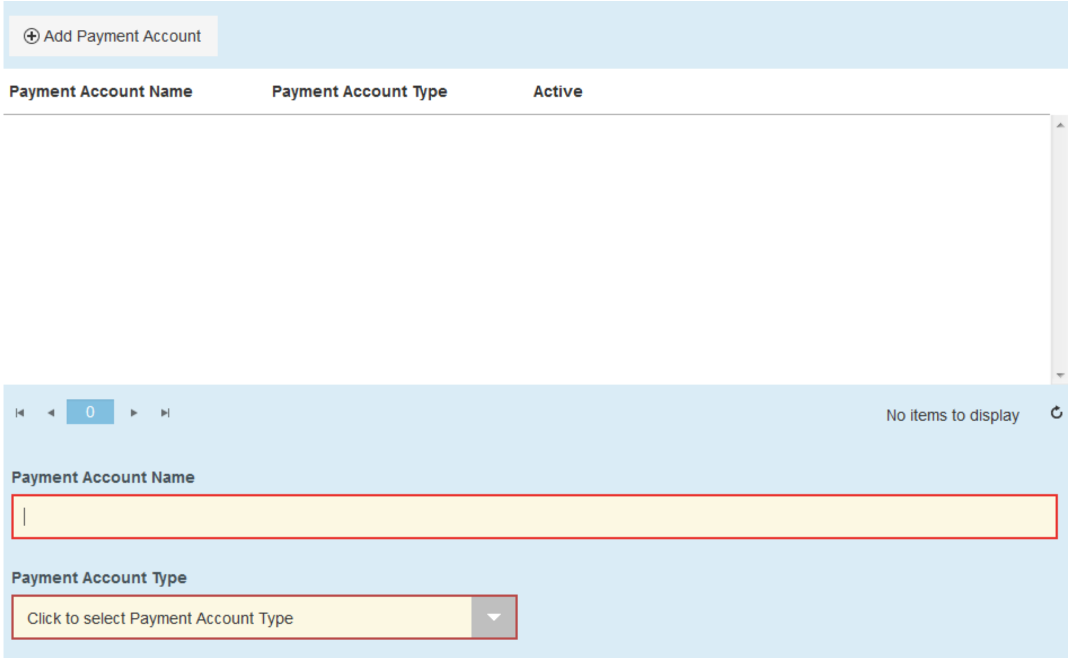
1. To begin setting up a payment account, click the orange "Actions" button. A drop down menu will appear. From this menu, select and click "Payment Accounts."



2. Click the "Add Payment Account" button



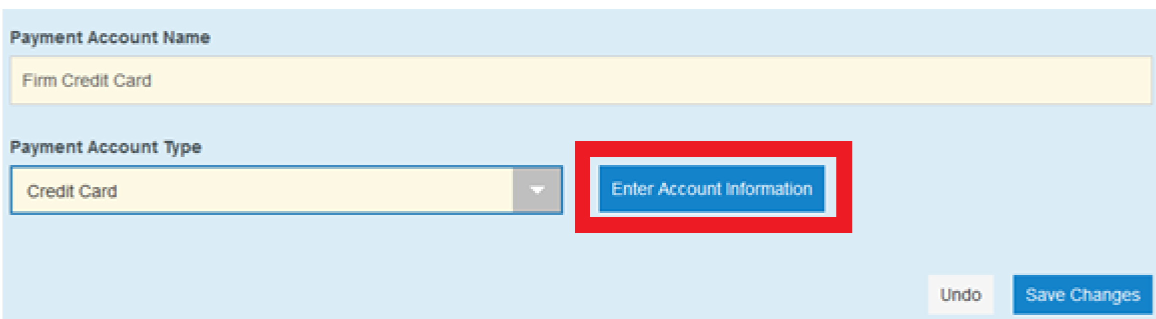
3. Below the list of present payment accounts, a text box and drop down will appear



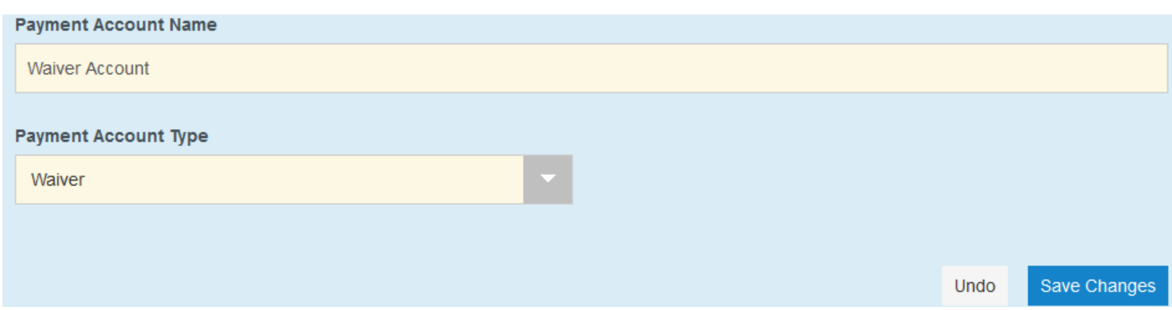
Enter the name of the account , which is a name for internal use/identifying purposes within your firm.

Select the type of payment account you wish to create (see a description of the options on the first page of this guide).

Once this information is input, an option to enter the account information appears. Click this button.



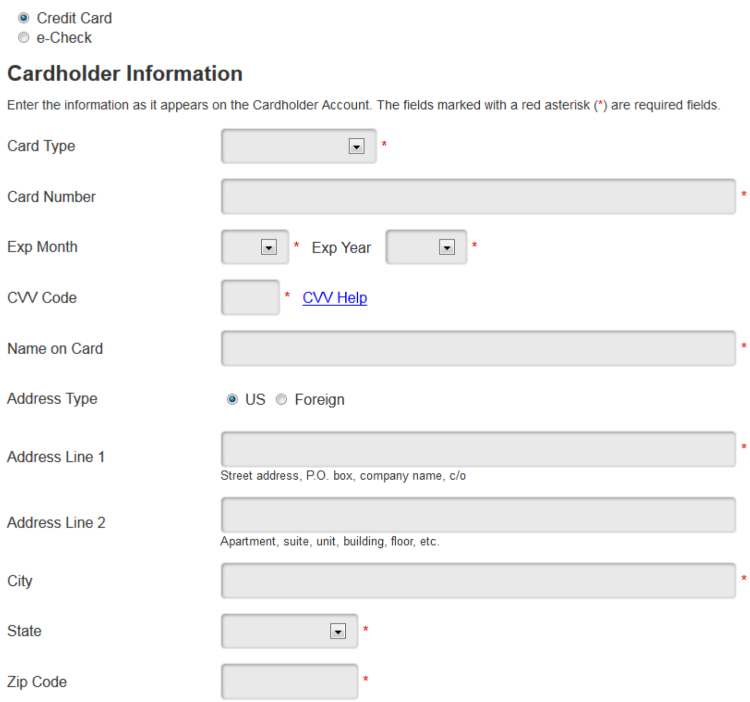
<u>Note</u>: This option *does not appear* when entering a waiver account. This is because there is no associated *payment* with waiver accounts, and therefore you do not need to enter any account information. Simply click "Save Changes" and your waiver account will be saved to your firm's list of available accounts.



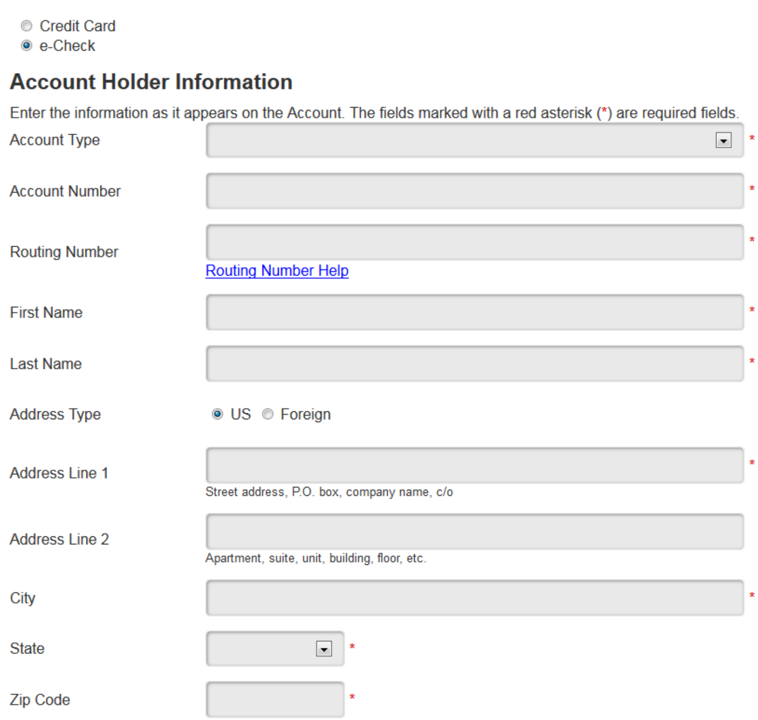
4. For credit cards and eChecks: in the Account Information popup, select the appropriate payment method for the card you're setting up

5. Fill in the information required once you've made your selection.

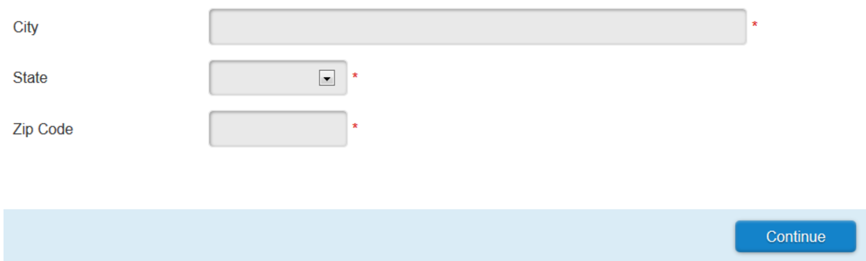
For Credit Cards:



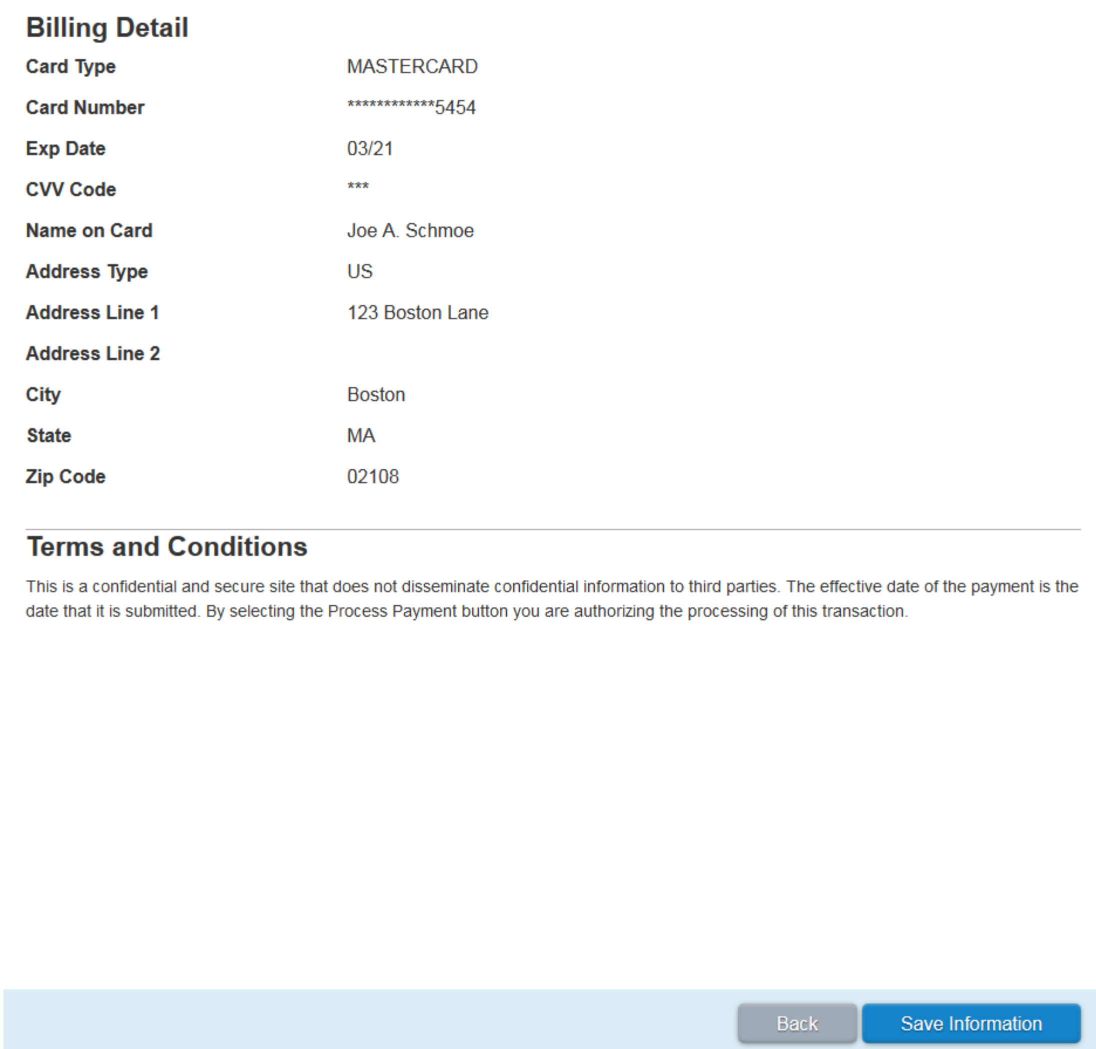
For e-Checks:



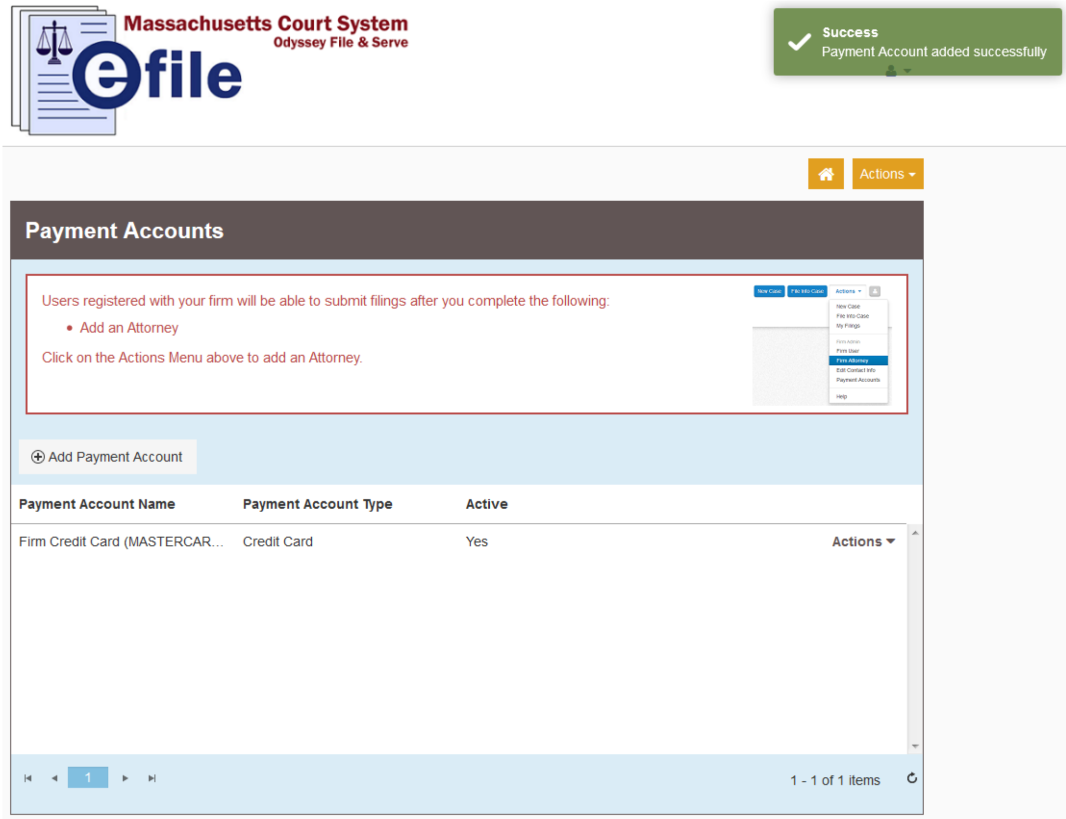
6. Click the blue "Continue" Button on the bottom right of the screen.



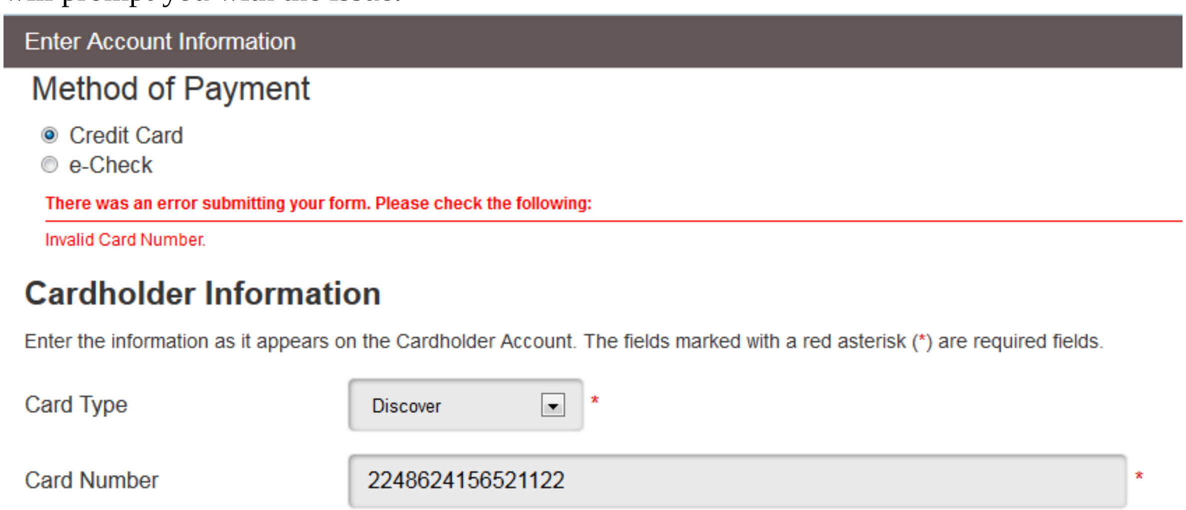
7. Click the blue "Save Information" button on the next screen if all of the information in the summary is correct. If it is not, press the grey "Back" button and correct the information



8. If the payment account is processed correctly, your Payment Accounts page will have a message in the top right indicating such and the card will appear listed:



9. If the Payment account is not processed correctly, the Enter Account Information screen will prompt you with the issue:



Should you encounter any problems submitting a card and you are sure you have entered the card information correctly, please call Tyler Support at 1.800.297.5377

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

ADDING A WAIVER ACCOUNT TO YOUR FIRM

Waiver accounts are used to waive court fees as well as the fee charged to use the e-filing system. These are accounts are only to be used when approved, i.e., when the Court has already approved that the filing fee be waived or it is a filing type where the fee is automatically waived. If a waiver account is used for a fee in which the filing fee is not deemed waived, the Clerk's Office will reject the filing and require submission with a valid payment account.

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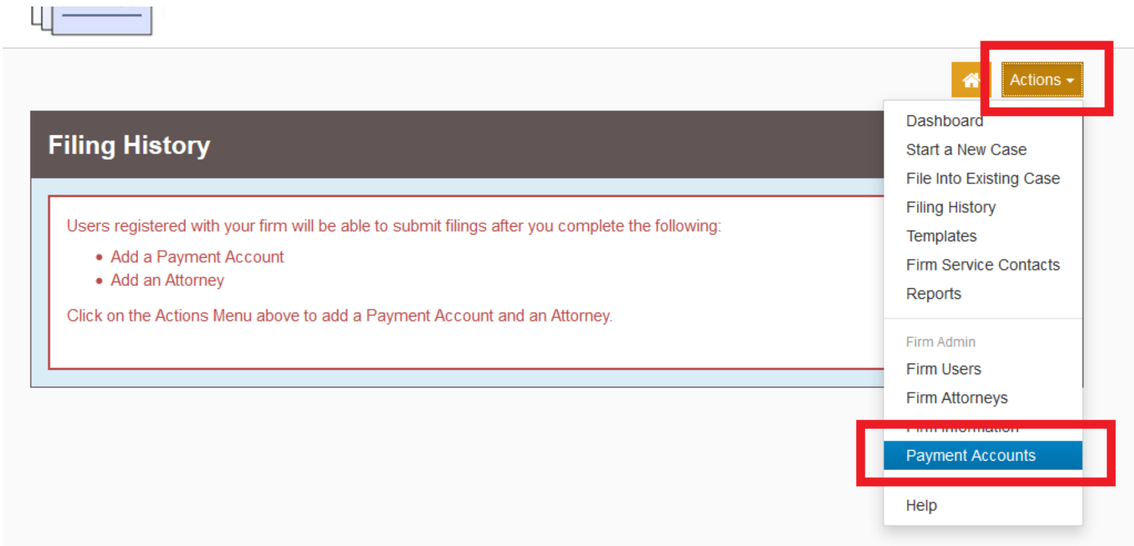
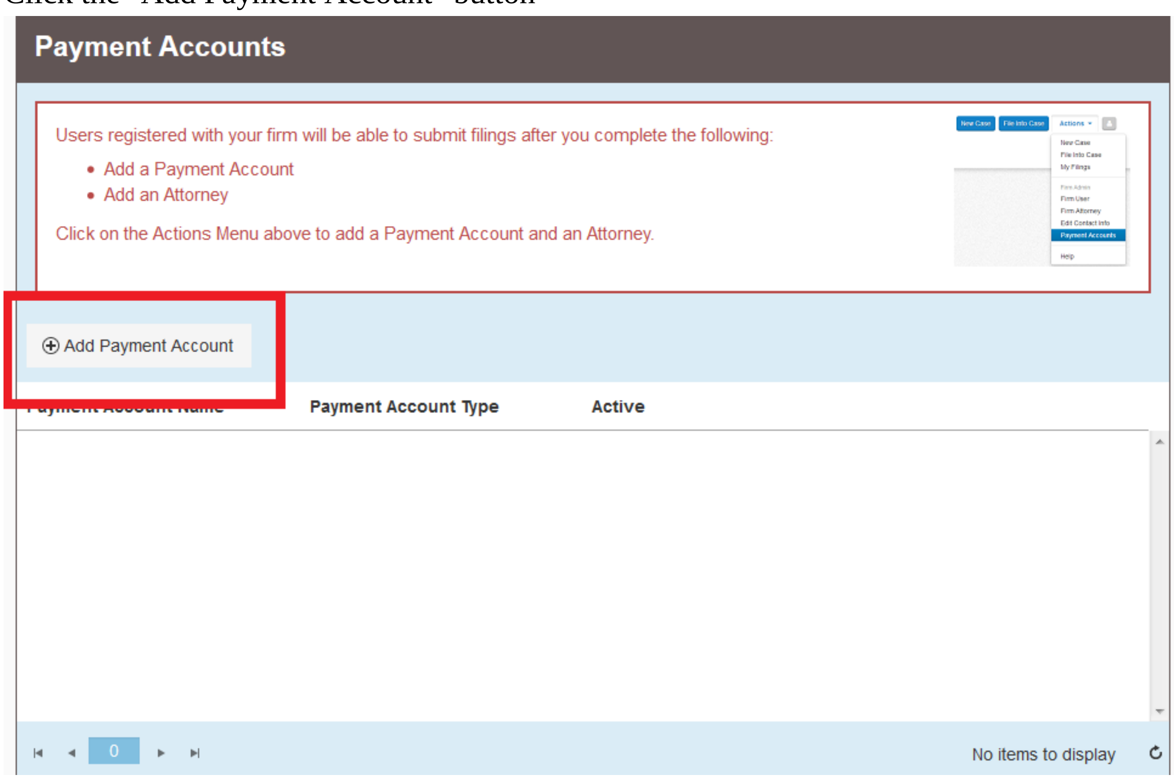
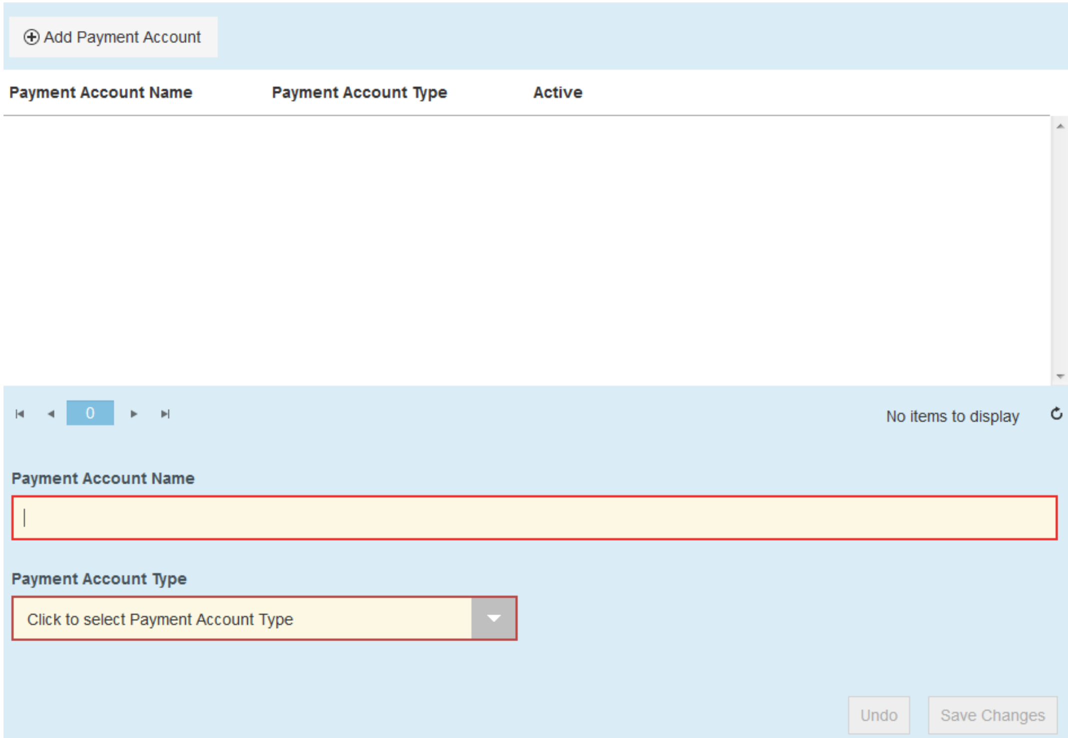
1. To set up a waiver account, click the orange "Actions" button on the user dashboard page. A drop down menu will appear. From this menu, select and click "Payment Accounts."



2. Click the "Add Payment Account" button

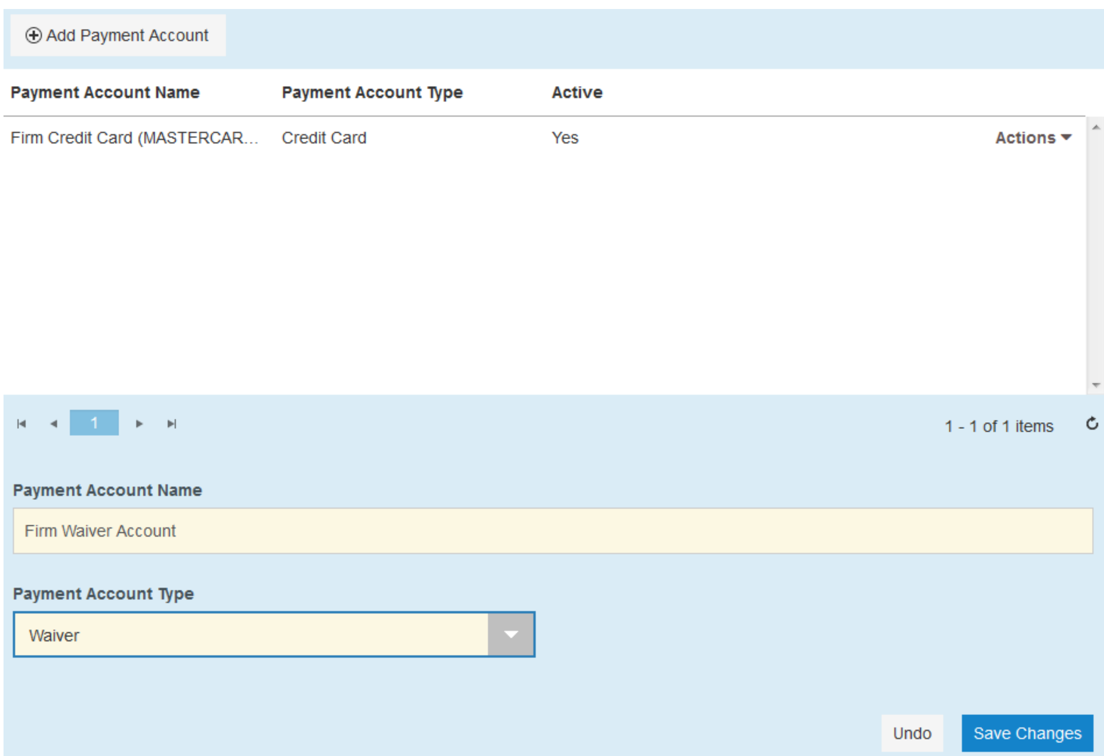


3. Below the list of present payment accounts, a text box and drop down will appear

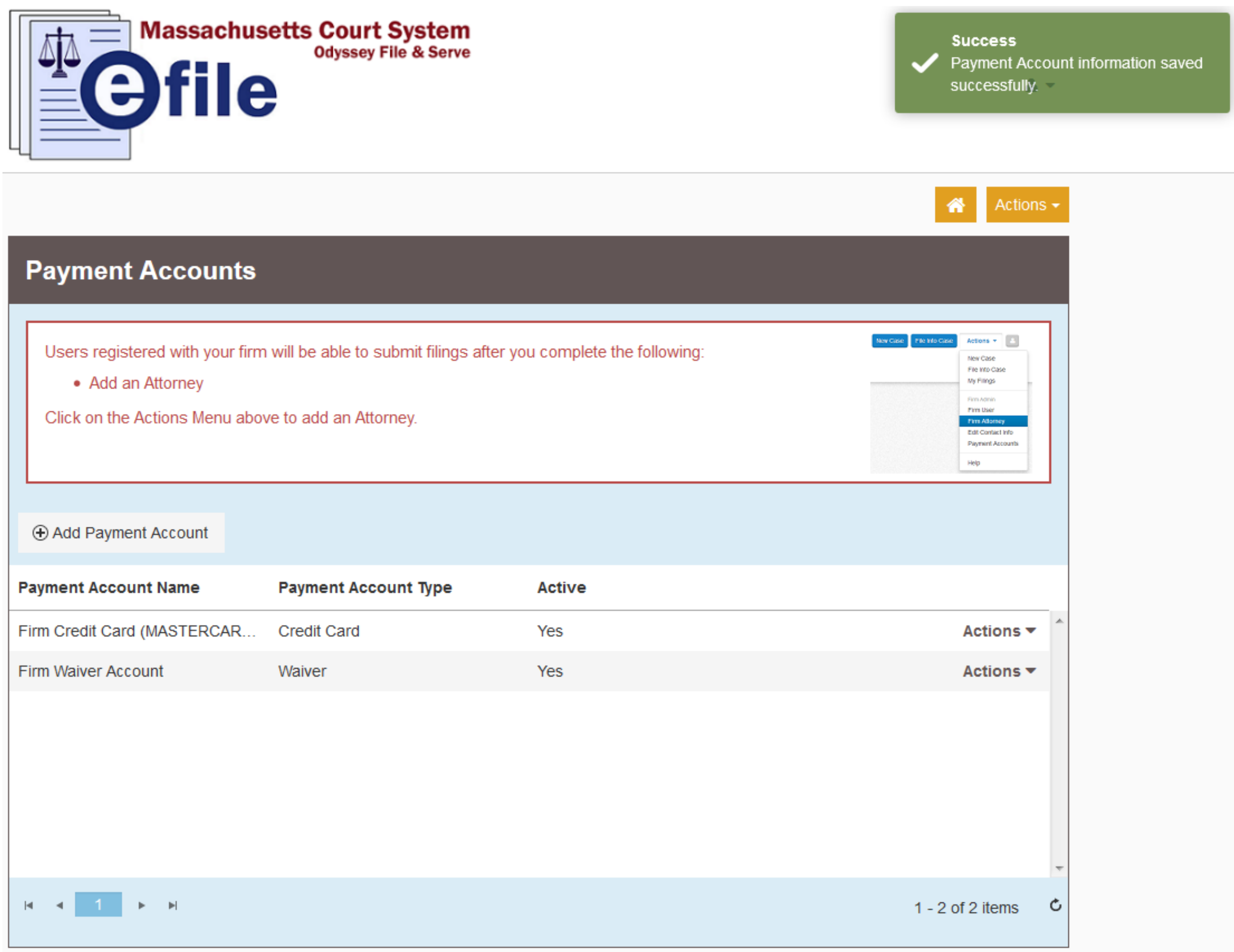


Enter the name you would like to give the Waiver account. This name is for internal use and reference.

Select "Waiver" in the Payment Account Type dropdown list:



4. Press the blue "Save Changes" button. Your waiver account will appear in the list of Payment Accounts for your firm.



Should you encounter any problems submitting a waiver account 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.

ADDING AN ATTORNEY TO YOUR FIRM

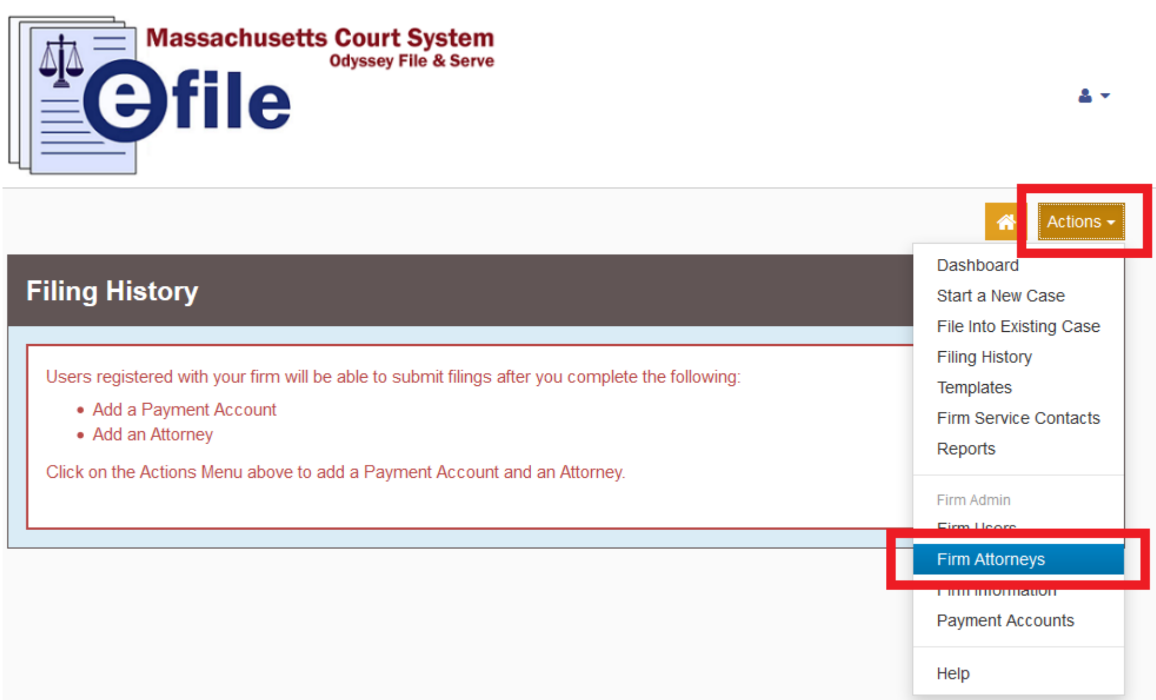
All firms must add attorneys *to their firm account*. This means that the *firm* account must add attorneys. This is *not* the same as inviting users who are attorneys at your firm to join the firm. Adding attorneys to the firm account allows users to select these attorneys as the filing attorney when submitted papers to the court; these attorneys are not given access to create cases or submit filings without also being individual users with their own accounts. Inviting an attorney to join the firm as a user allows them to start cases and file into existing cases.

For information on how to invite users to join your firm, see the user guide on this topic.

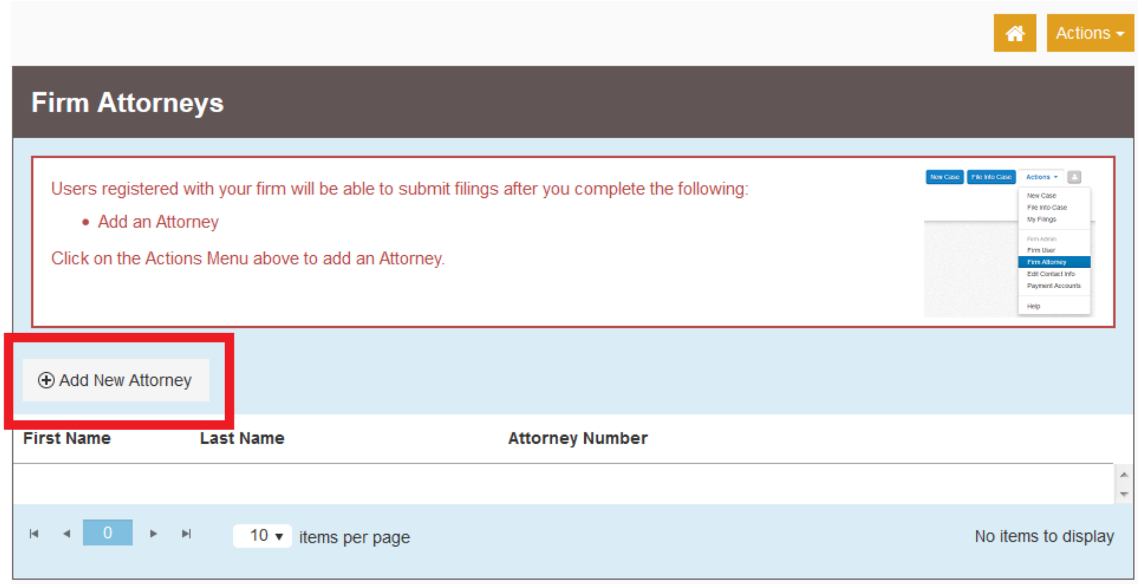
NOTE: ***ALL*** **attorneys added to a firm** ***must*** **also be added to the Firm's Service Contacts. By enrolling in the e-filing system as a filing attorney, attorney's at your firm are automatically consenting to be served electronically by other parties in all cases in which they appear.**

See separate instruction document for adding service contacts to your firm.

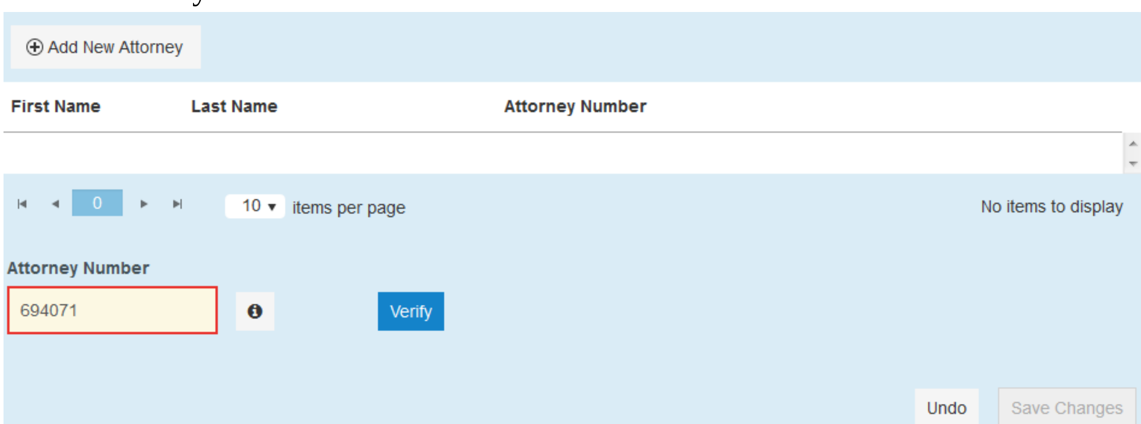
1. Click the orange "Actions" button. A drop down menu will appear. From this, select and click "Firm Attorneys"



2. Click the "Add New Attorney" button



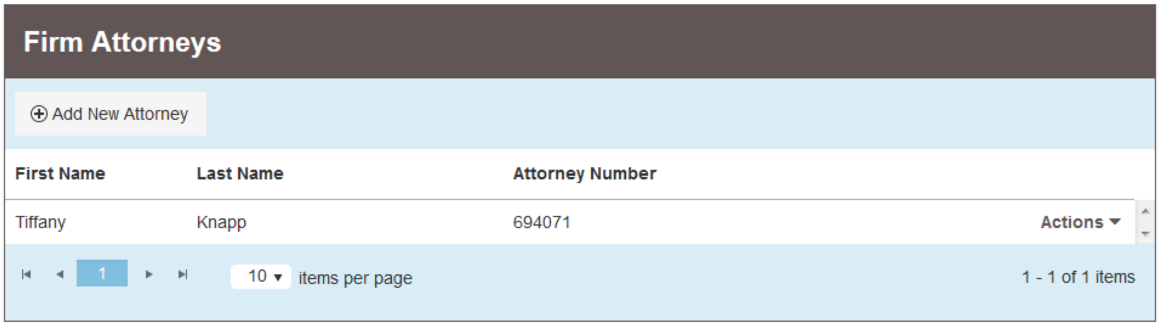
3. In the Attorney Number field that appears, enter the BBO number of the attorney you wish to add to your firm.



4. Click the blue "Verify" button. The name of the attorney will automatically appear. Should you need to make corrections to the name, do so in the text fields.

Then click the blue "Save Changes" button.

5. The attorney will then appear in your Firm Attorney's list.



Should you encounter any problems adding an attorney and you are sure you have entered the information correctly, please call Tyler Support at 1.800.297.5377

<u>Please do not call the Clerk's Office with technical support related questions.</u>

ADDING SERVICE CONTACTS TO YOUR FIRM

Adding service contacts to your *firm* account allows other parties to electronically serve filings on those who are listed as service contacts.

By enrolling in the e-filing system, users are automatically consenting to be electronically served in all cases in which they appear. This includes receiving electronic notices from the Appeals Court.

NOTE: *ALL* persons who are registered as Firm Attorneys ***must*** be added to the firm Contacts list. They can either do this themselves if they are added as a firm user, or the firm administrator can do this.

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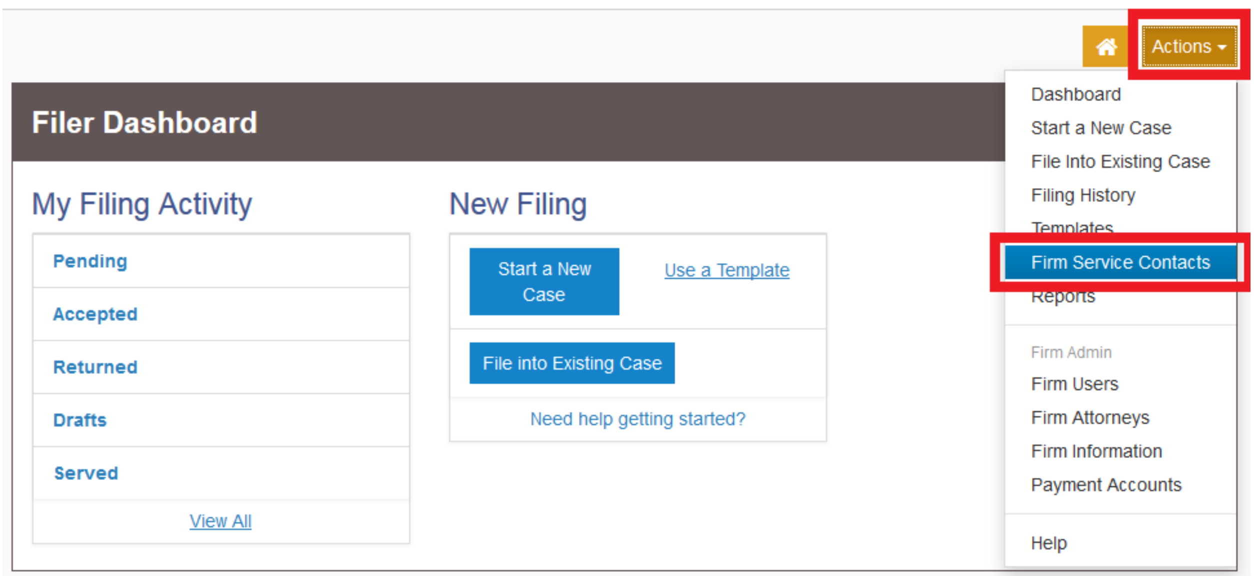
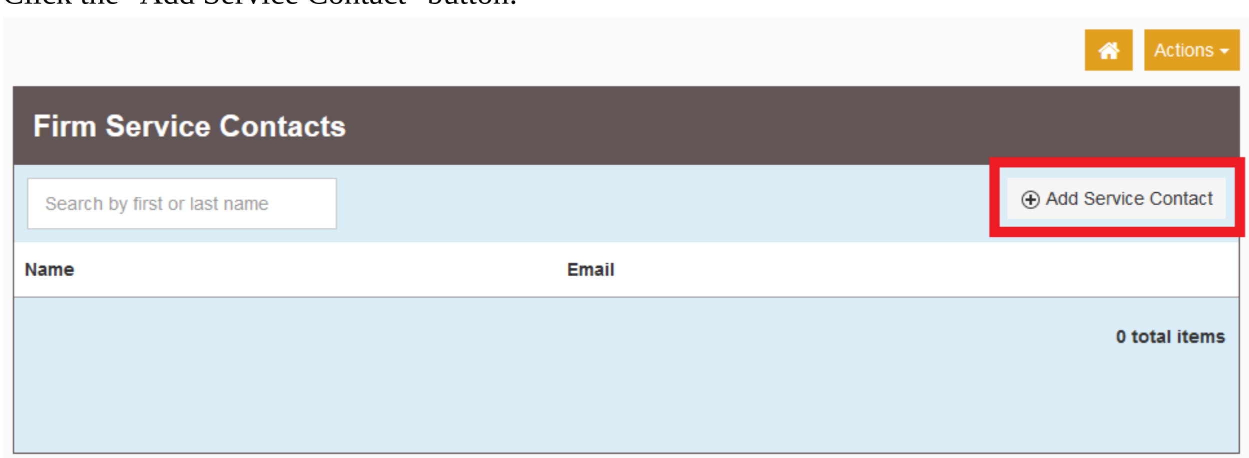
1. Click the orange "Actions" button. A drop down menu will appear. From this, select and click "Firm Service Contacts"



2. Click the "Add Service Contact" button:

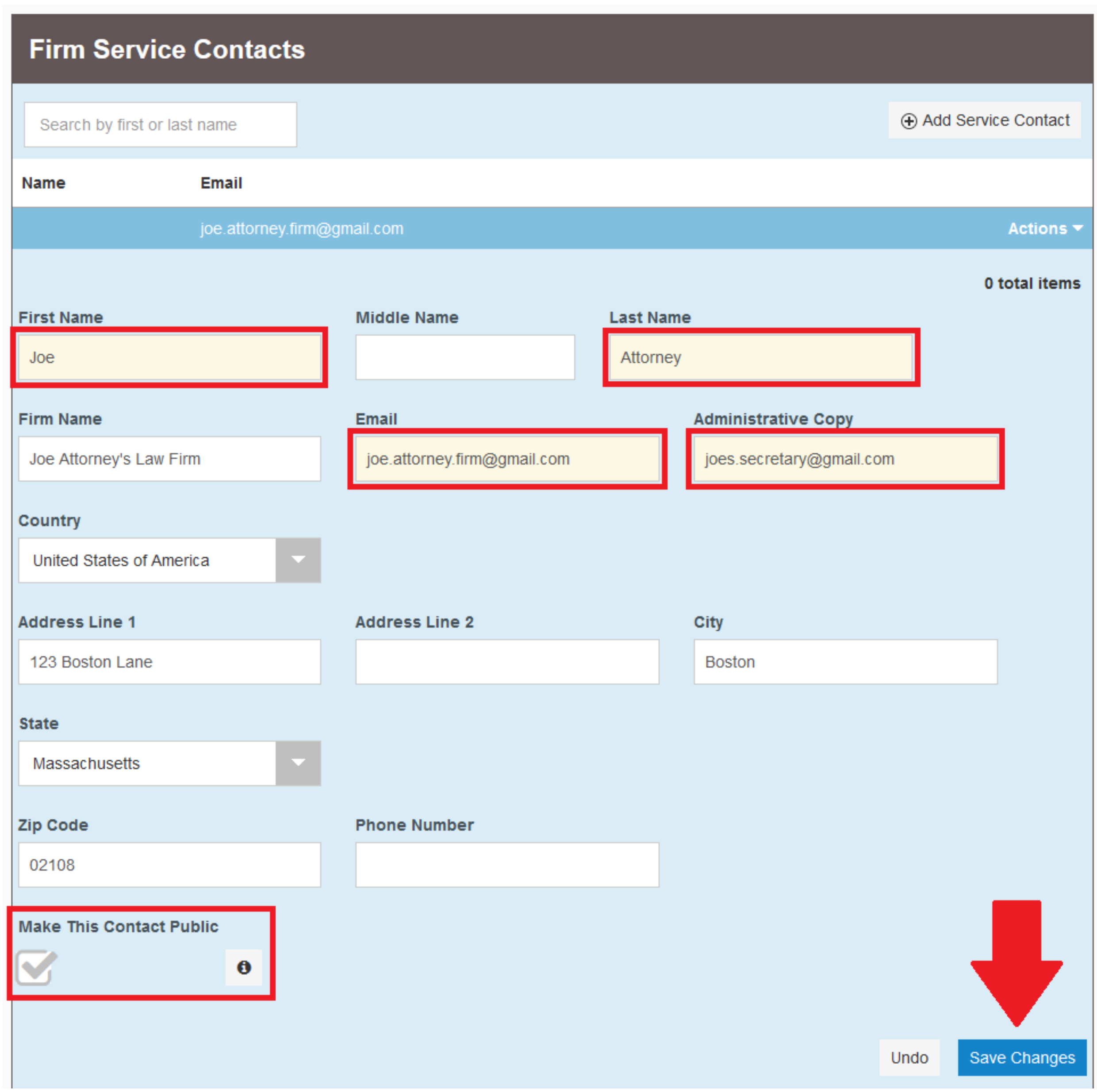


3. Fill in the information for the contact . Fields outlined in red on the screen are required.

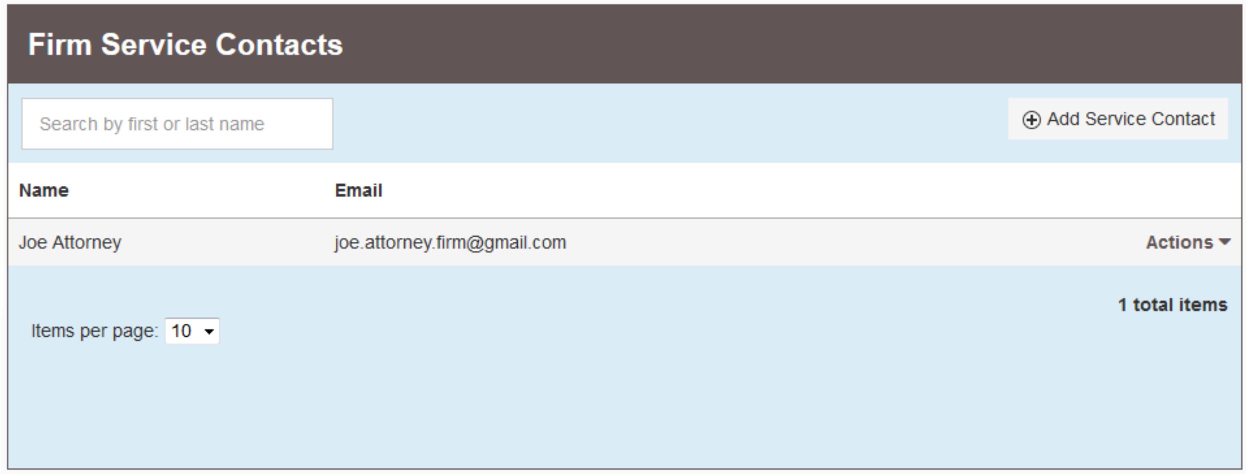
The "Administrative Copy" field allows a duplicate email to be sent to the email address entered here. For example, and attorney may wish electronic service and/or notices be sent both to his or her personal email as well as the email of his or her assistant or secretary.

<u>Note</u>: It is mandatory that you leave the "Make This Contact Public" box checked. By enrolling in the e-filing system, attorneys are consenting to receive electronic service of documents in cases in which they have appeared in the Appeals Court as well as electronic notice from the Appeals Court. Leaving this box checked allows opposing parties to serve you.

When all of the information has been filled out completely, click the blue "Save Changes" button.



4. The contact will be added to your Firm Service Contacts:



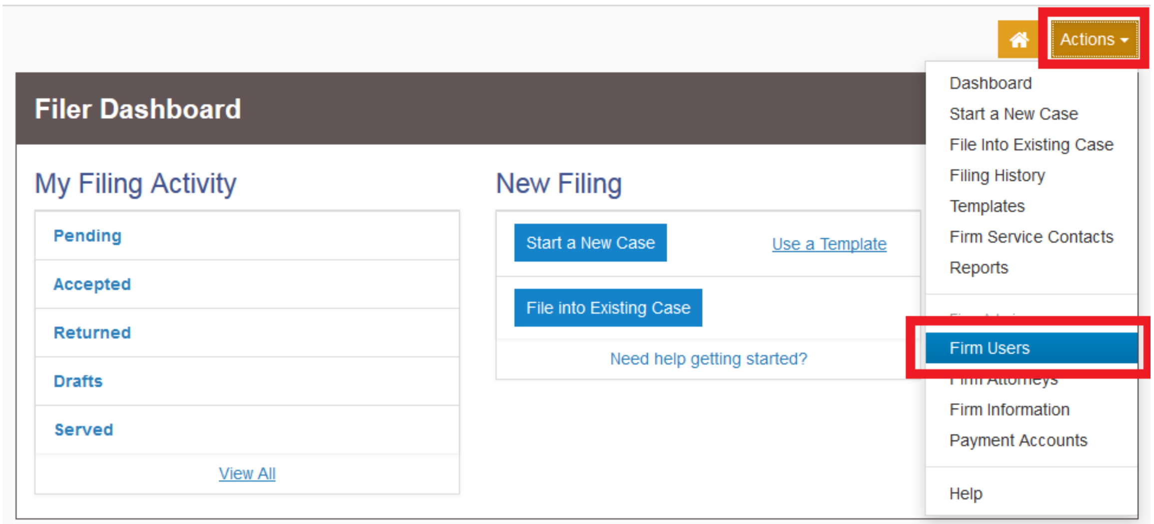
Should you encounter any problems adding a service contact and you are sure you have followed the previous steps correctly, please call Tyler Support at 1.800.297.5377

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

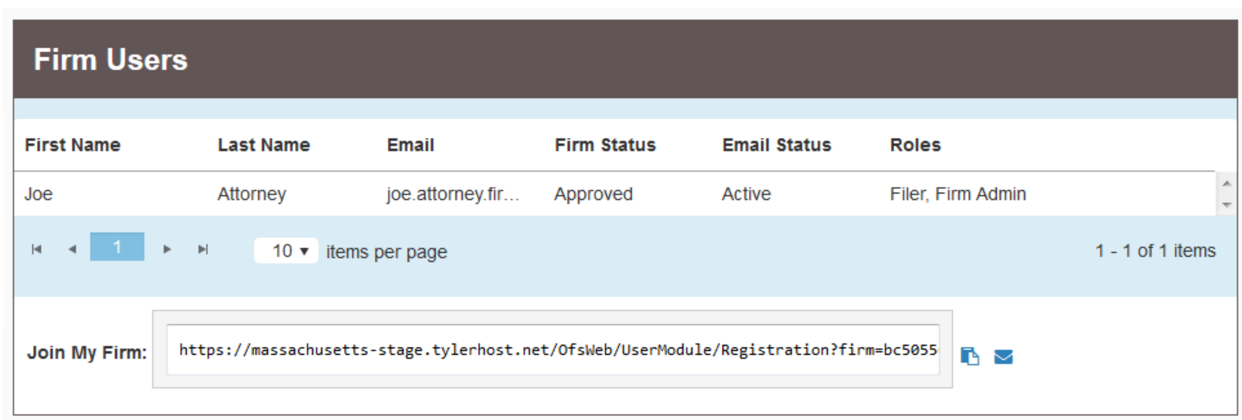
INVITING USERS TO JOIN YOUR FIRM

Firm users are able to start new electronically filed cases and file into existing cases. They cannot, however, add other firm users, add firm attorneys, edit firm information, or add/change payment account information. Firm users can, however, add to the firm service contact list.

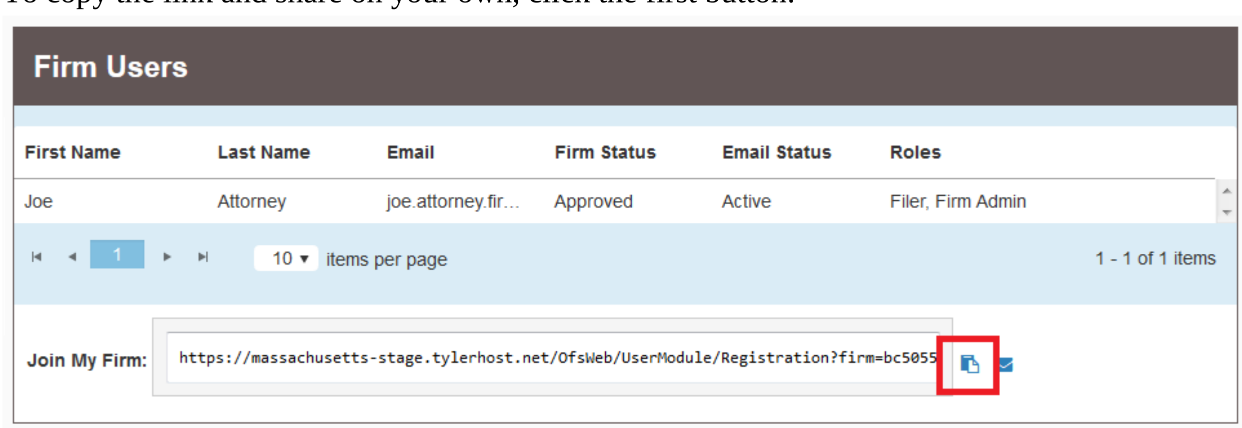
1. Click the orange "Actions" button. A drop down menu will appear. From this, select and click "Firm Users"



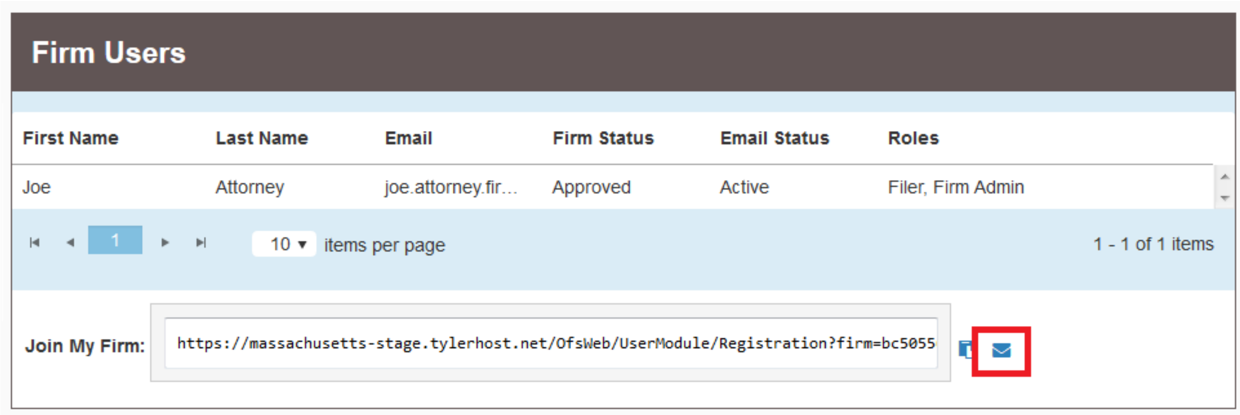
2. There is a link with two buttons beside it:



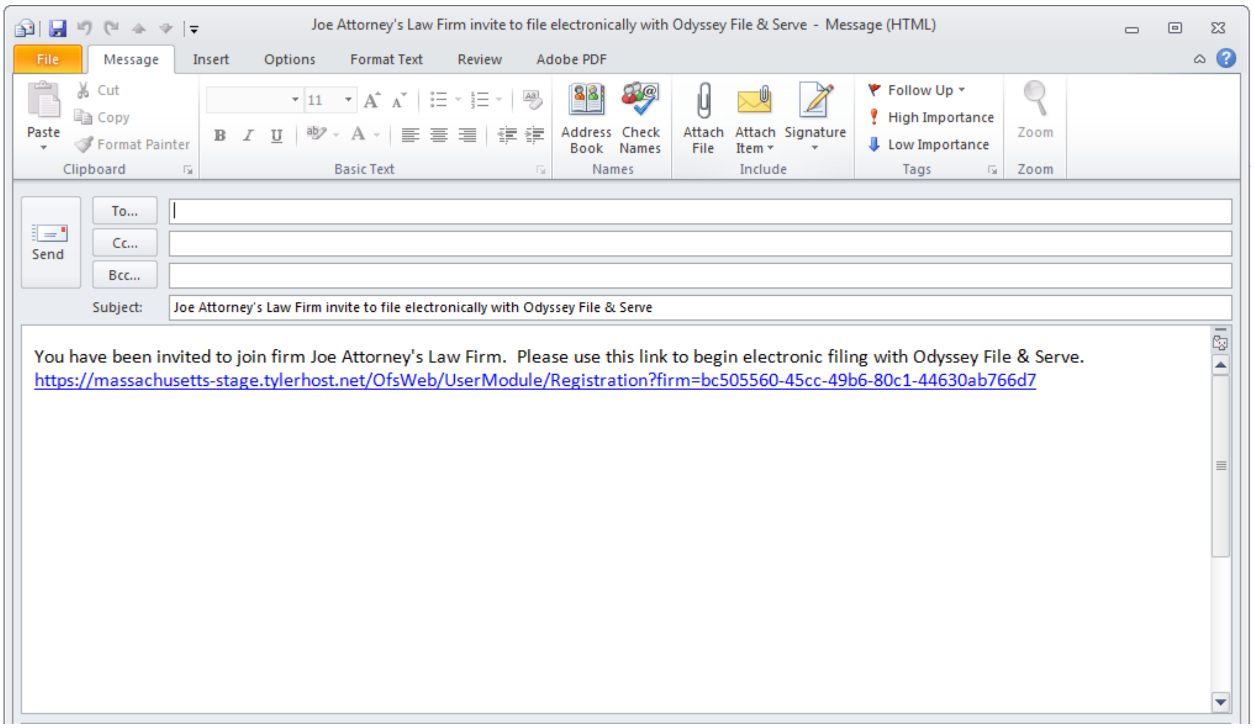
3. To copy the link and share on your own, click the first button:



4. To email the link directly from the Tyler system, click the second button, shaped like an envelope:



Edit the email that is created as desired and click "Send"



Should you encounter any problems inviting users to join your firm and you are sure you have followed these instructions correctly, please call Tyler Support at 1.800.297.5377

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

If, when creating your firm administrator account (see separate user guide for step-by-step instructions for creating this account) you leave box beside the "Require administrator approval of new user registration" text checked, you will have to manually approve users when they join your firm before they can access their accounts and submit filings under the firm name.

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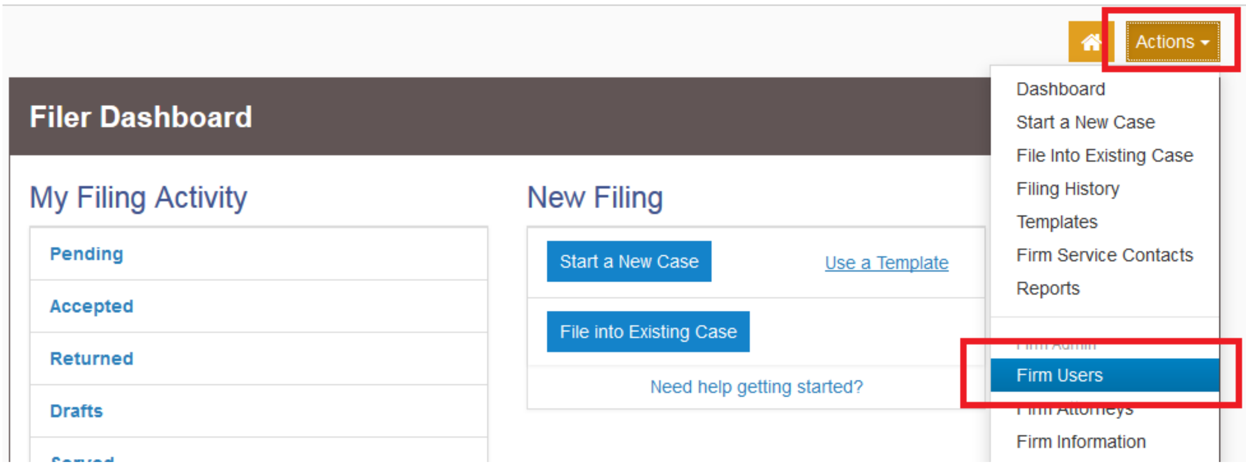
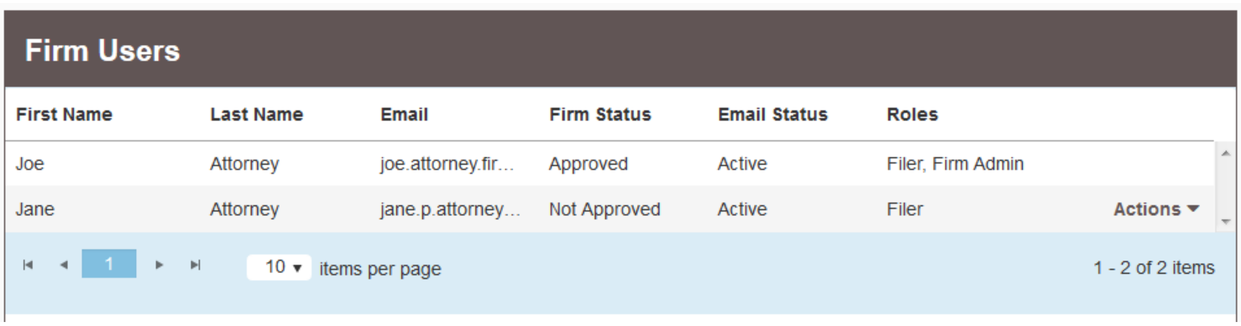
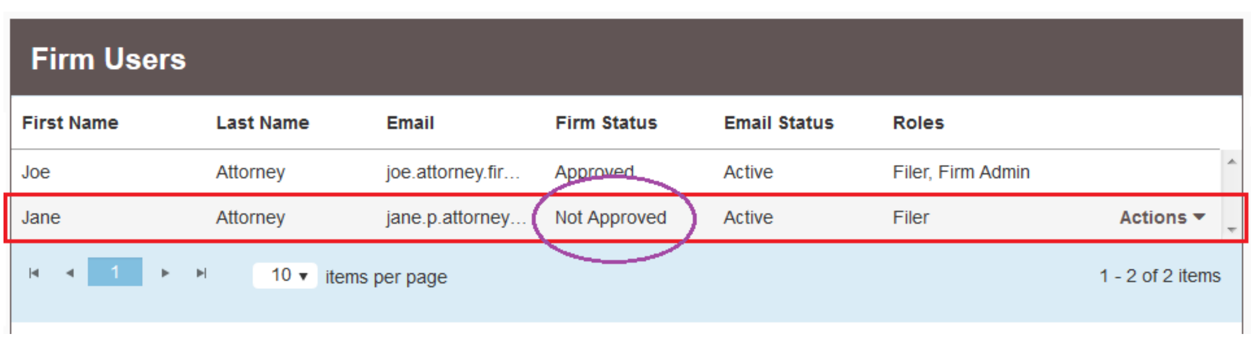
1. Click the orange "Actions" button. A drop down menu will appear. From this, select and click "Firm Users"



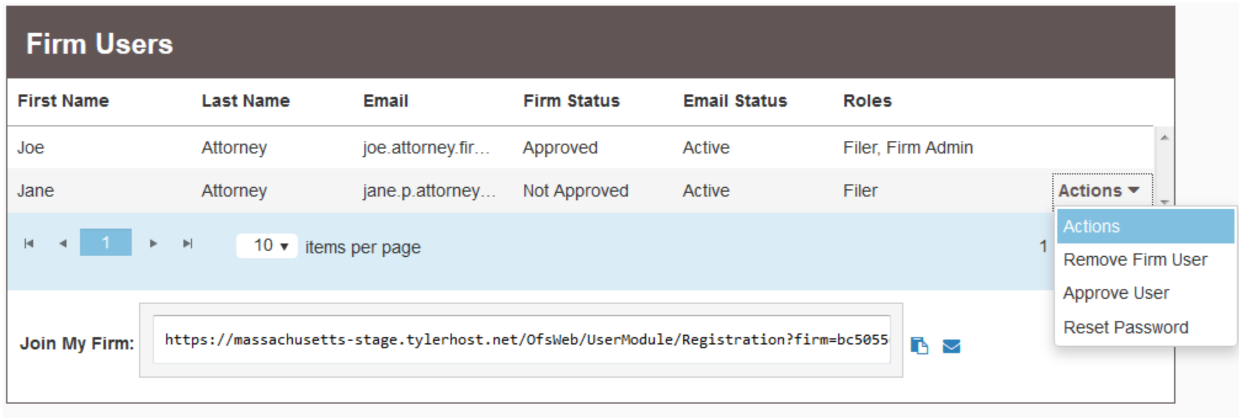
2. Check the "Firm Status" column under the list of Firm Users.



Should a user need to be approved, the entry under their name will be "Not Approved" under the "Firm Status" Column

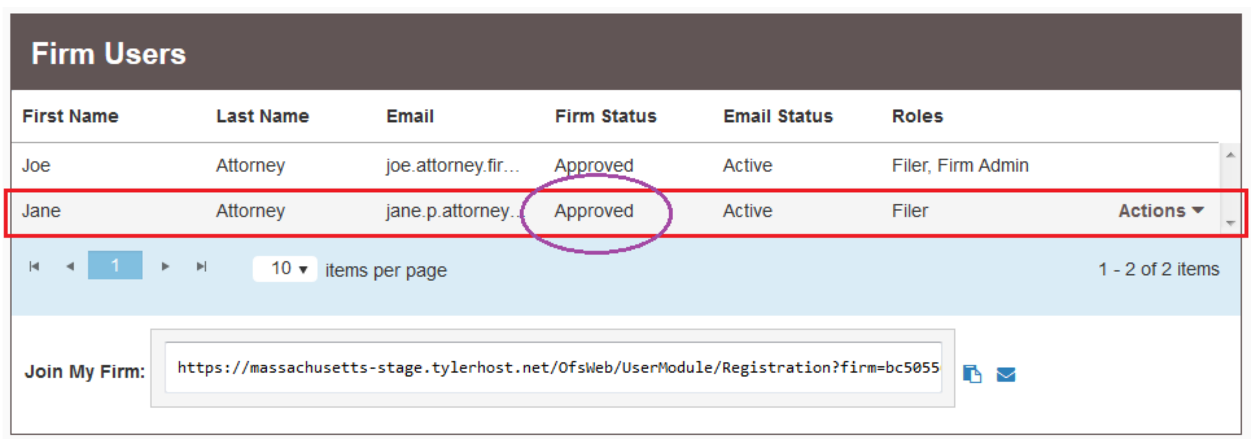


3. Click the "Actions" drop down next to a user that needs to be approved:



To approve the user, click "Approve User."
To reject the user, click "Remove Firm User."

4. When approved, the user will then appear as "Approved" in the "Firm Status" column:



Should you encounter any problems approving a firm user and you are sure you have followed the previous steps correctly, please call Tyler Support at 1.800.297.5377

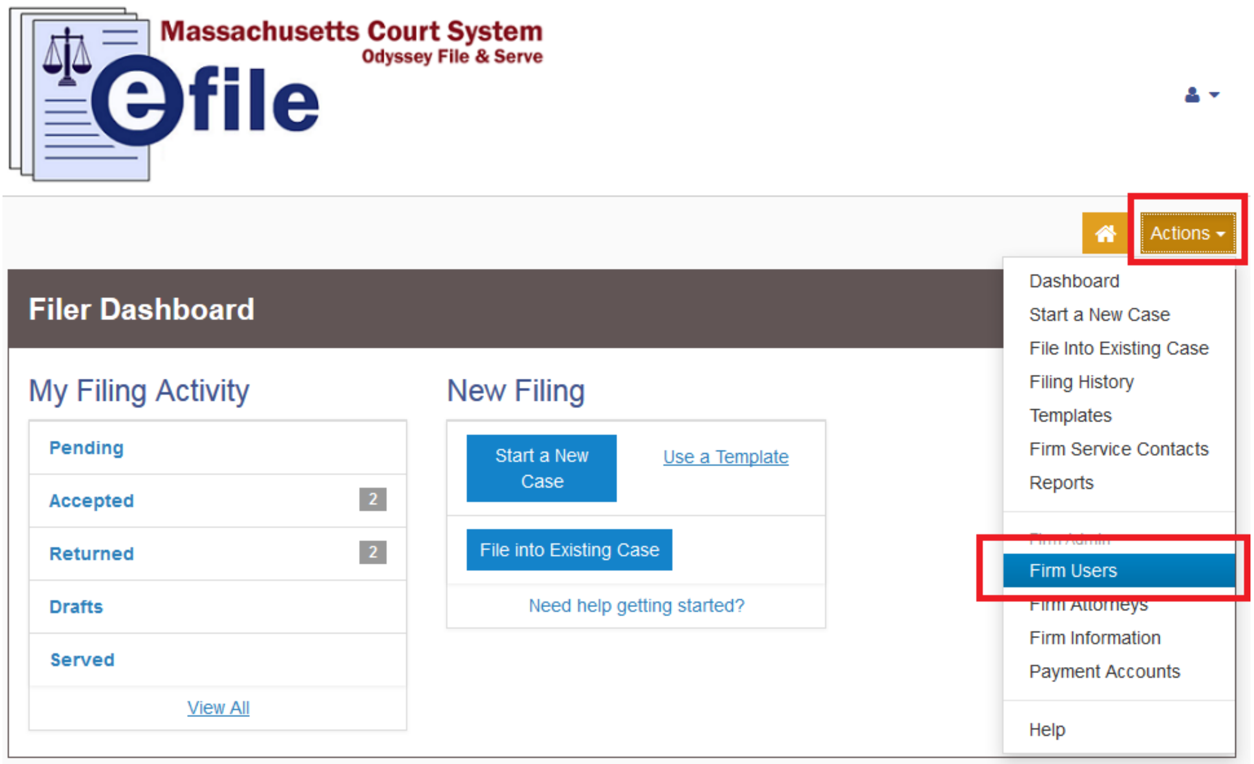
Please do not call the Clerk's Office with technical support related questions.

RESETTING A FIRM USER'S PASSWORD

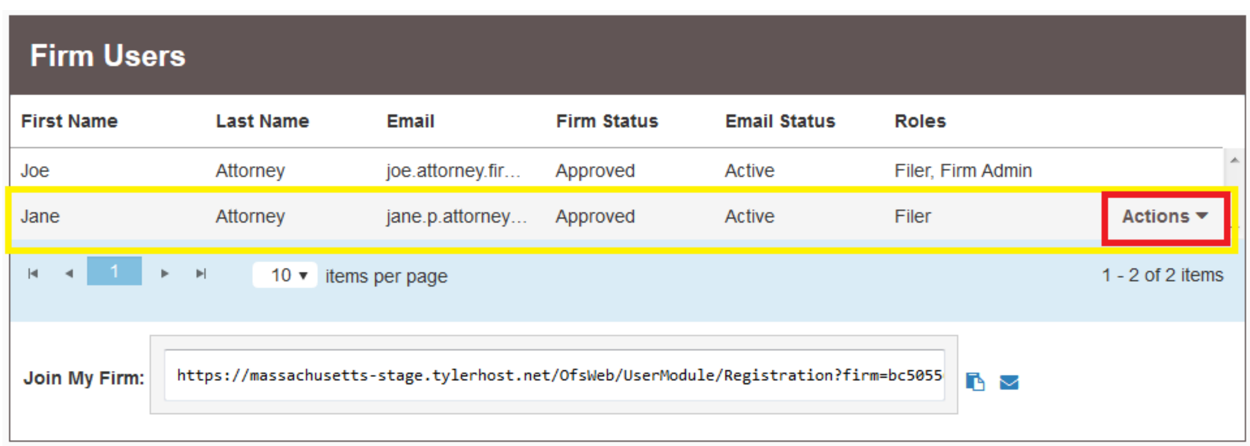
Should a firm user forget their password, a firm administrator needs to reset it for them in order for them to be able to access their account.

Communicate the new password you chose to the user who needs account access after following the steps below.

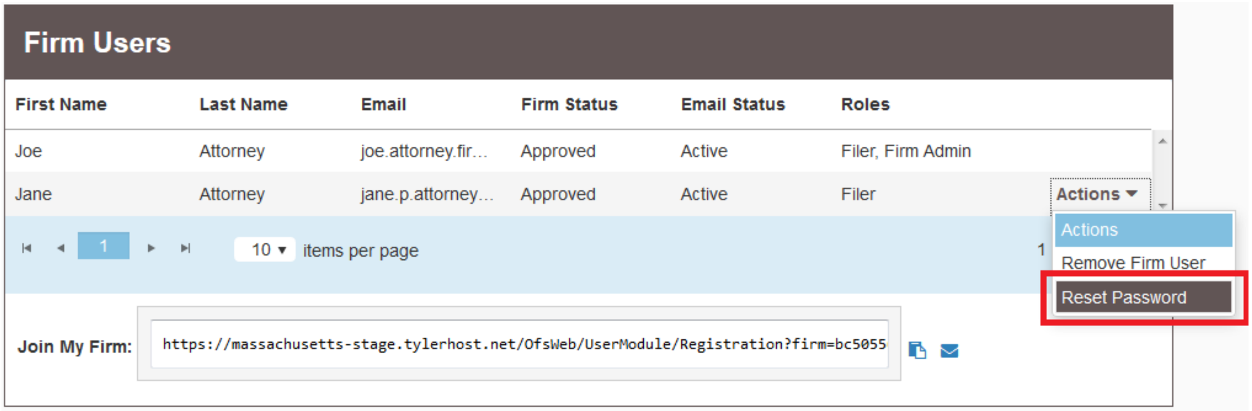
1. Click the Actions drop down menu on the right of the home screen. Select "Firm Users" from the dropdown menu:



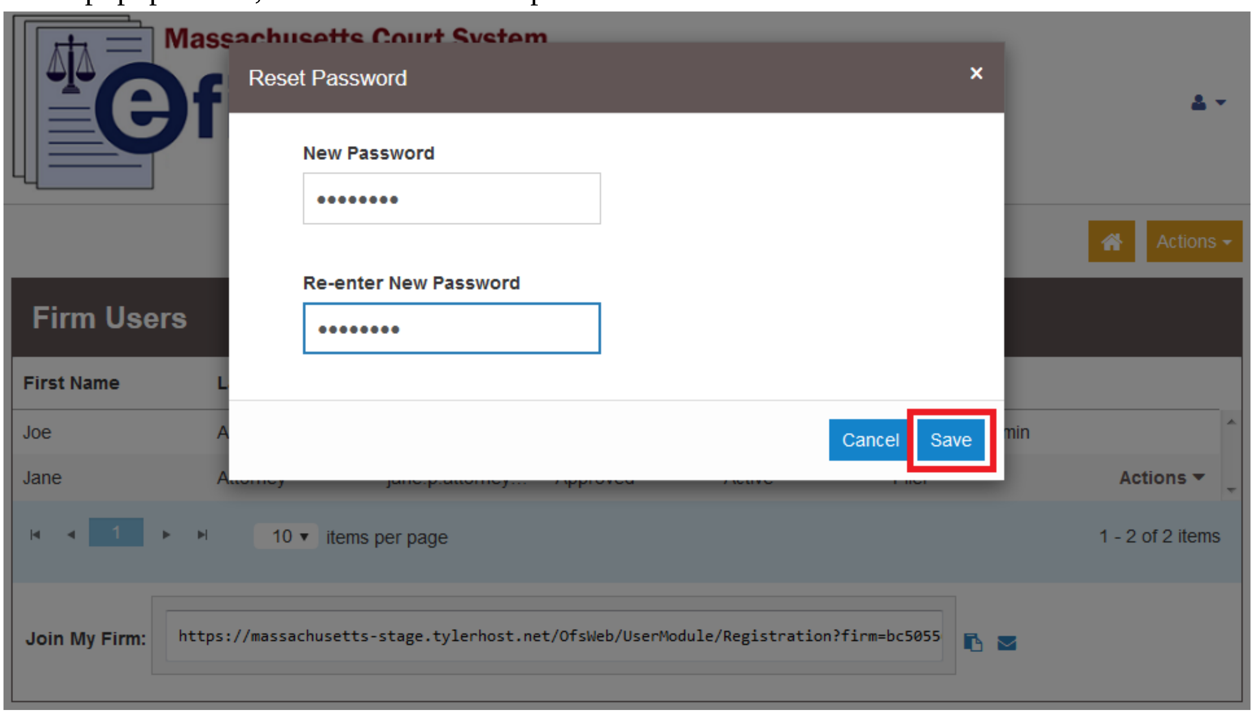
2. Click the "Actions" dropdown menu that appears next to the user whose password needs to be reset:



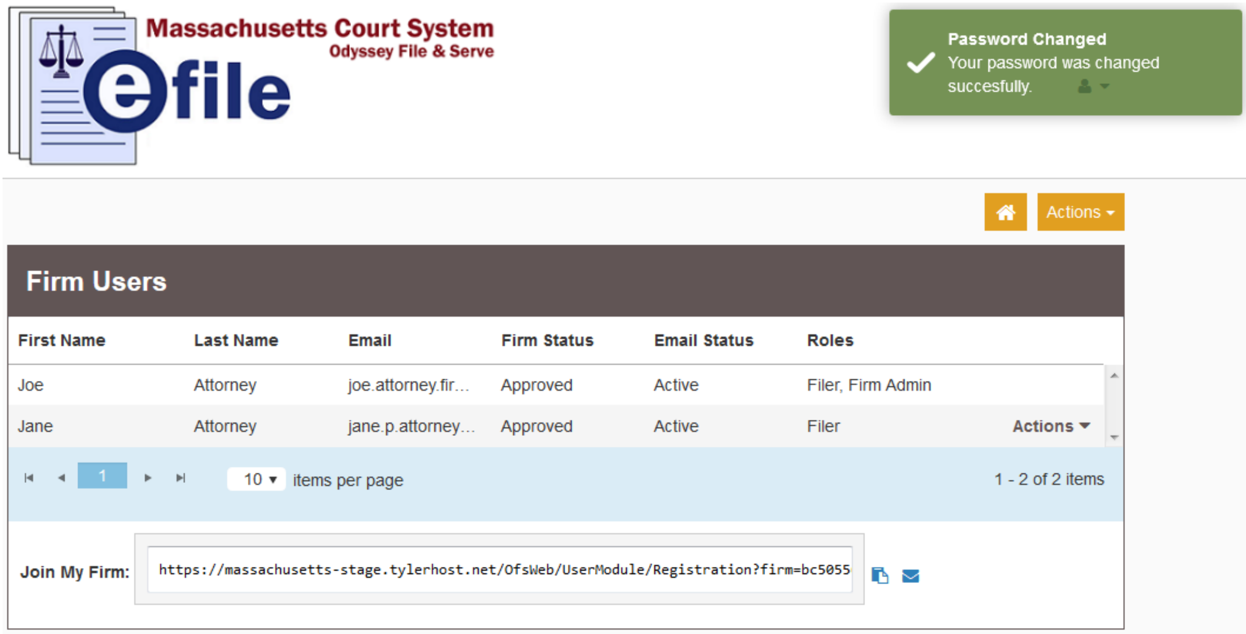
3. From the dropdown, click "Reset Password"



4. In the popup screen, enter the user's new password in both boxes and click "Save":



5. When the change is made successfully, a green notification will appear in the top right of your screen:



6. Be sure to communicate the new password to the affected user.

Should you encounter any problems resetting a user's password and you are sure you have followed the previous steps correctly, please call Tyler Support at 1.800.297.5377

<u>Please do not call the Clerk's Office with technical support related questions.</u>

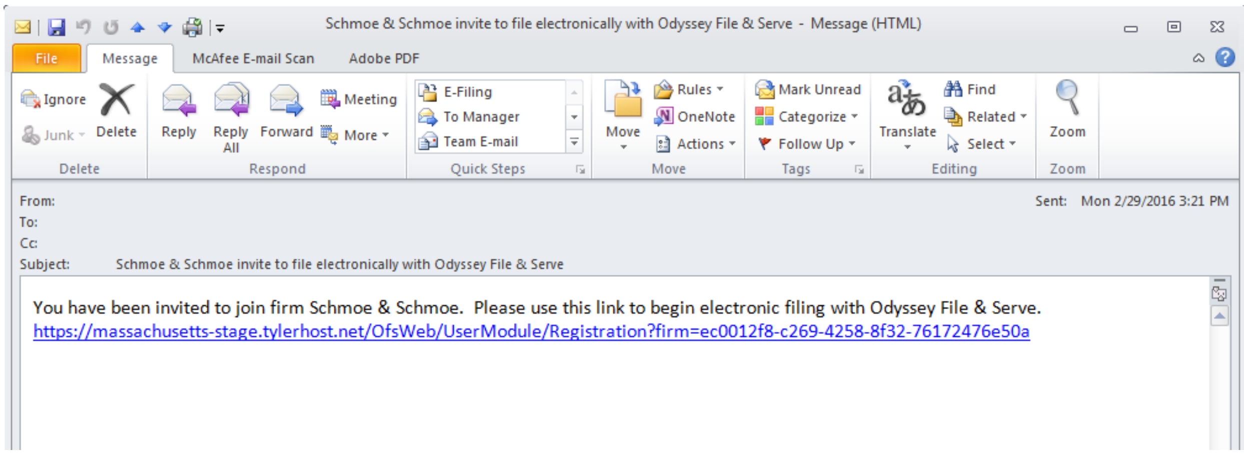
FIRM USER GUIDES

Joining a Firm as an Invited User

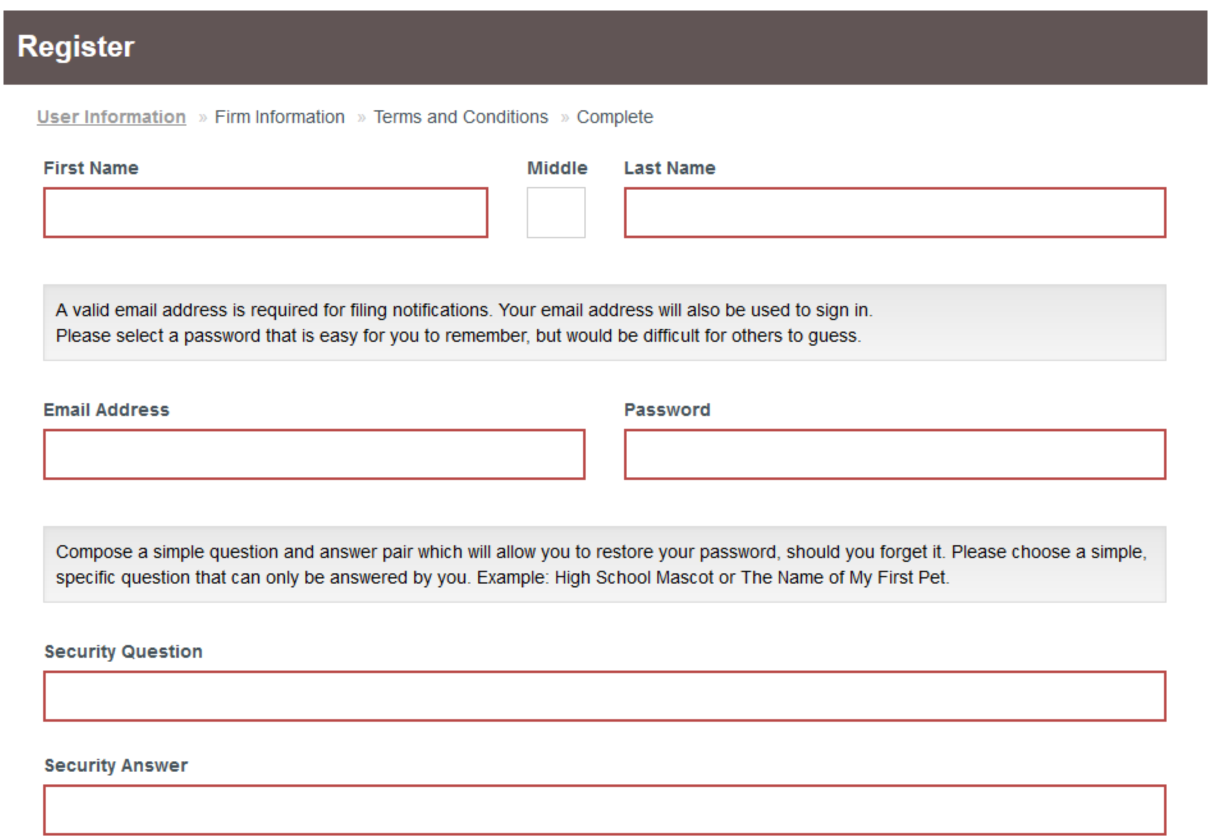
If your firm administrator invites you to join a law firm in the e-filing system, follow these steps to become a user associated with your firm. This will allow you to create cases and submit filings to the court.

Firm users do not have to be attorneys.

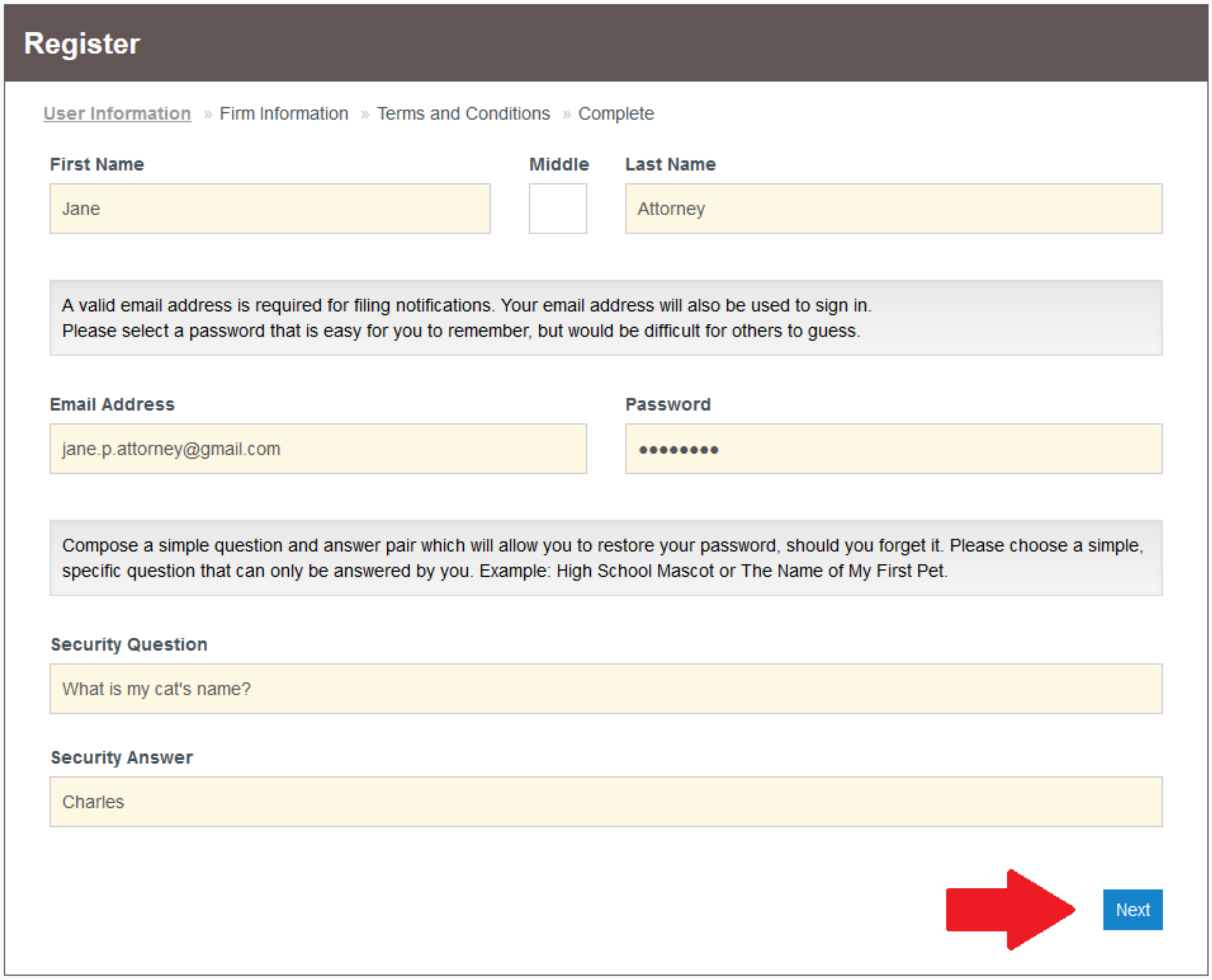
1. Click the link contained in your invitation email (or otherwise provided to you):



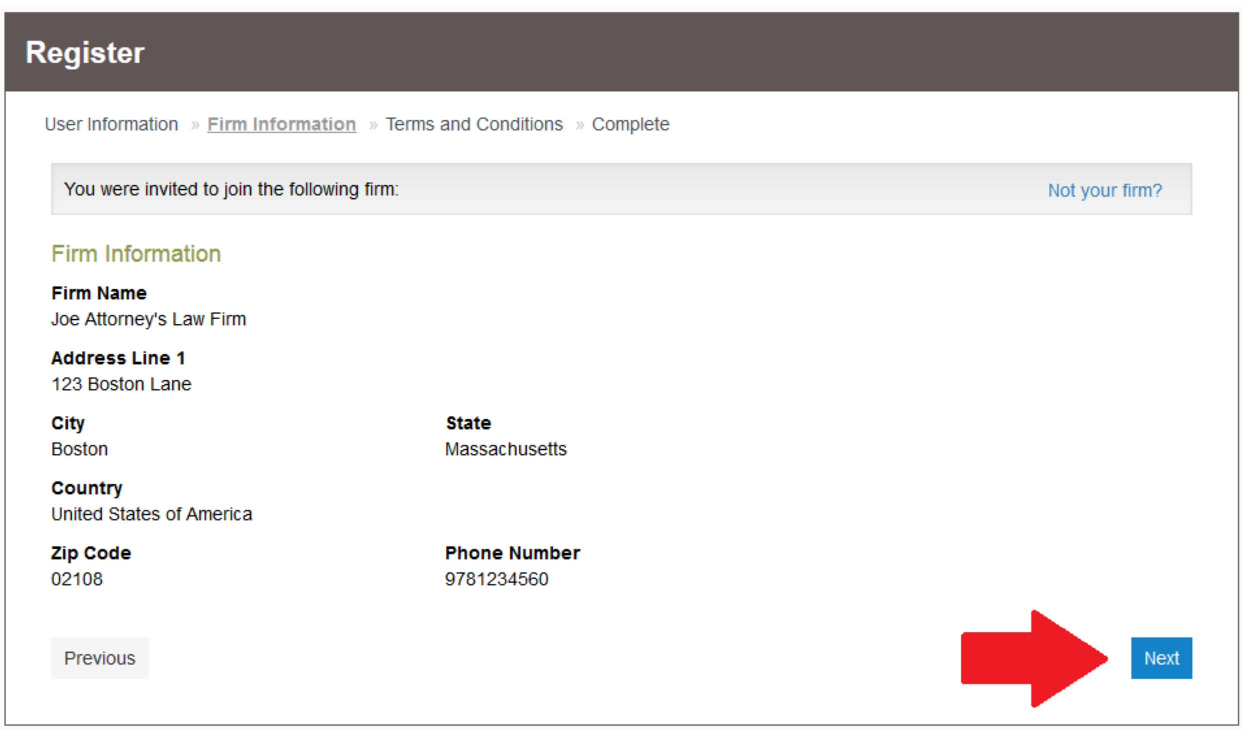
2. Fill out the information on the Registration screen (red fields are required):



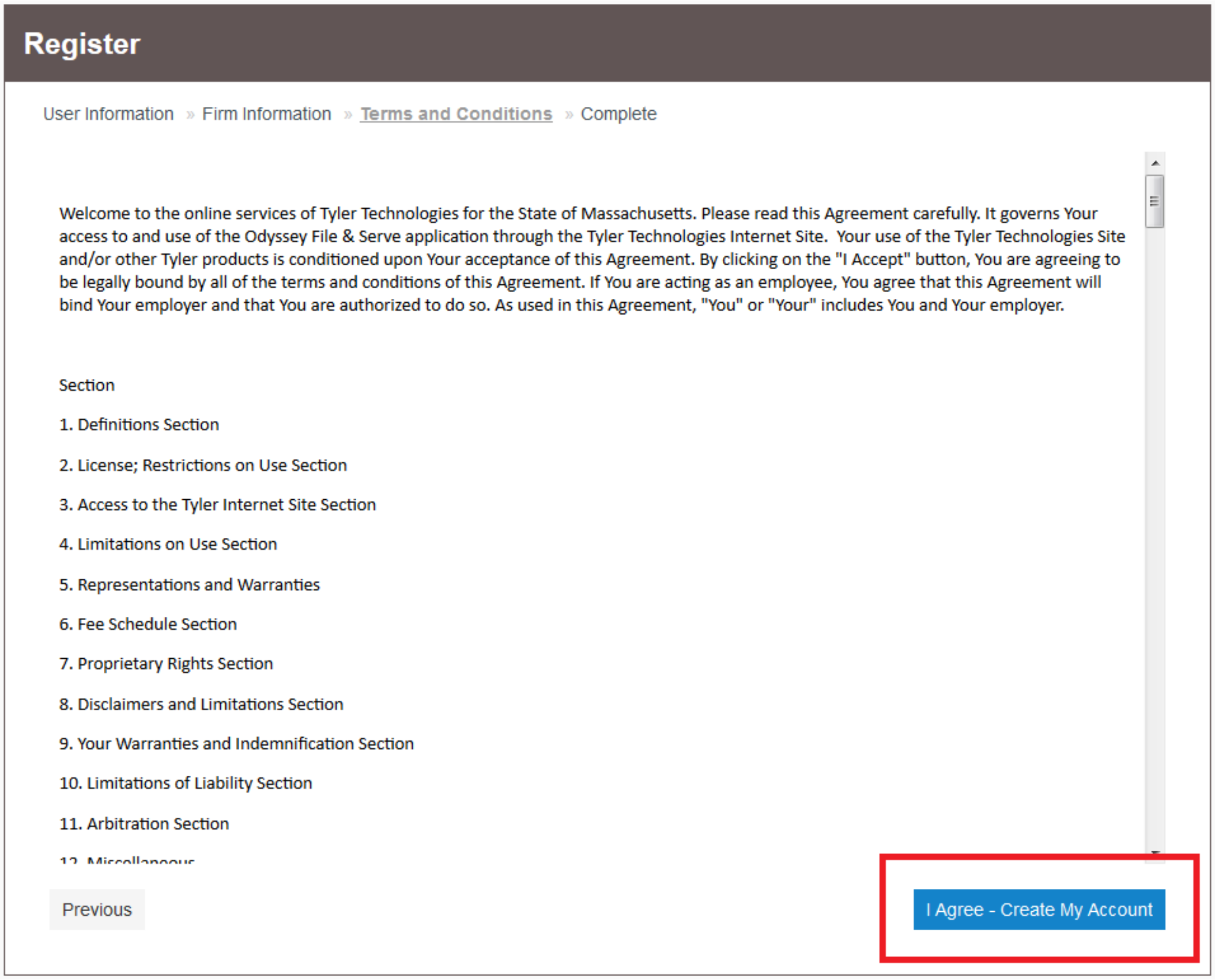
3. Click the "Next" button:



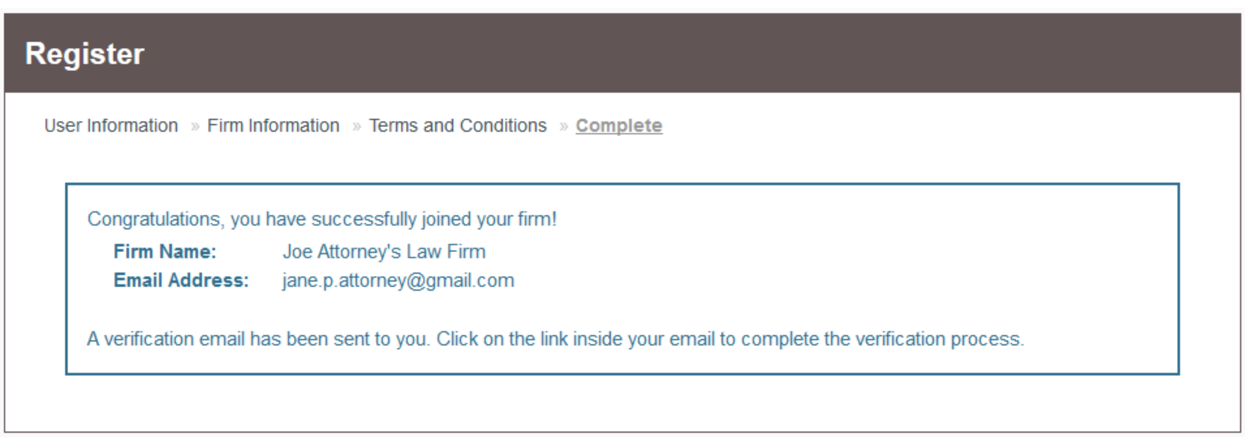
4. Confirm that the firms you are joining is your firm by clicking the blue "Next" button:



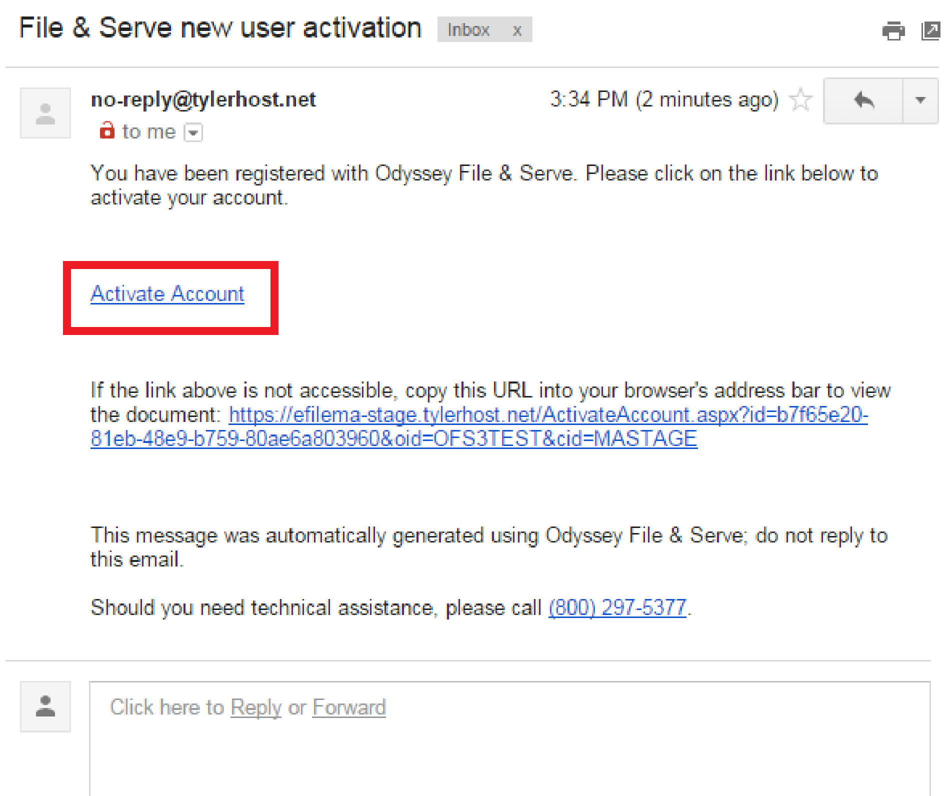
5. Read the Terms and Conditions for the system. If you agree to those conditions, click the blue "I Agree - Create My Account" button:



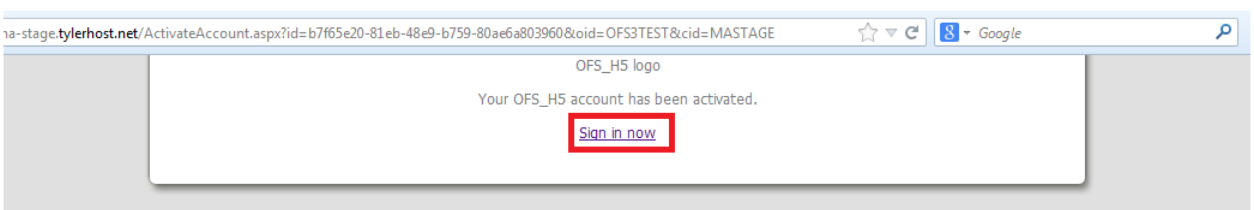
6. As instructed by the system, check the email you registered your firm under for a link to complete the verification process.



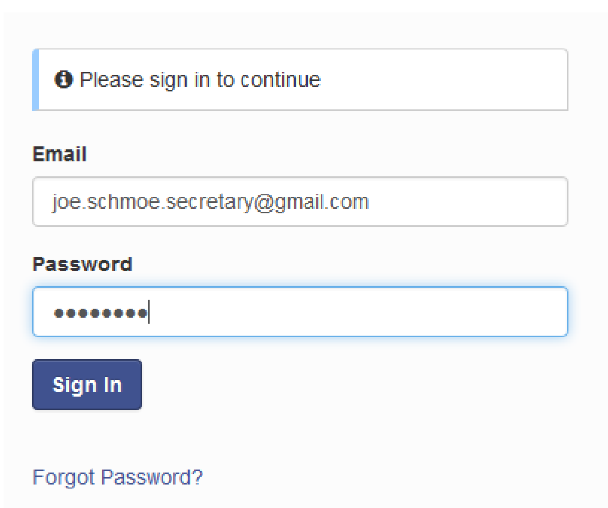
7. Click the link in the email from no-reply@tylerhost.net to activate your account



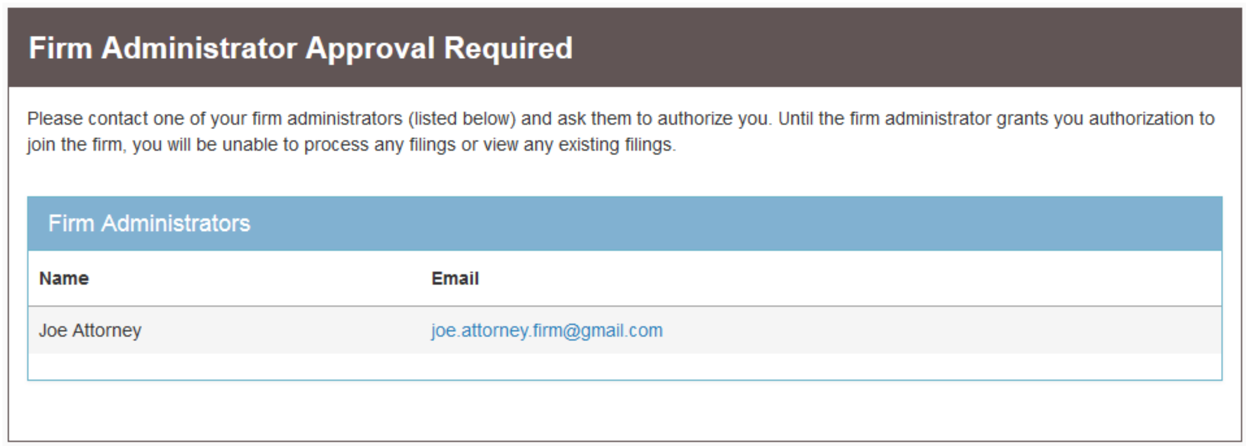
8. You should be brought to a screen that looks like this; Click the "Sign in now" link.



9. Enter the email and password you just used to set up your new account and click "Sign In":



10. Your firm may require approval before your account will be functional. If that is the case, contact the firm administrator indicated on the screen to approve you before you can begin filing:



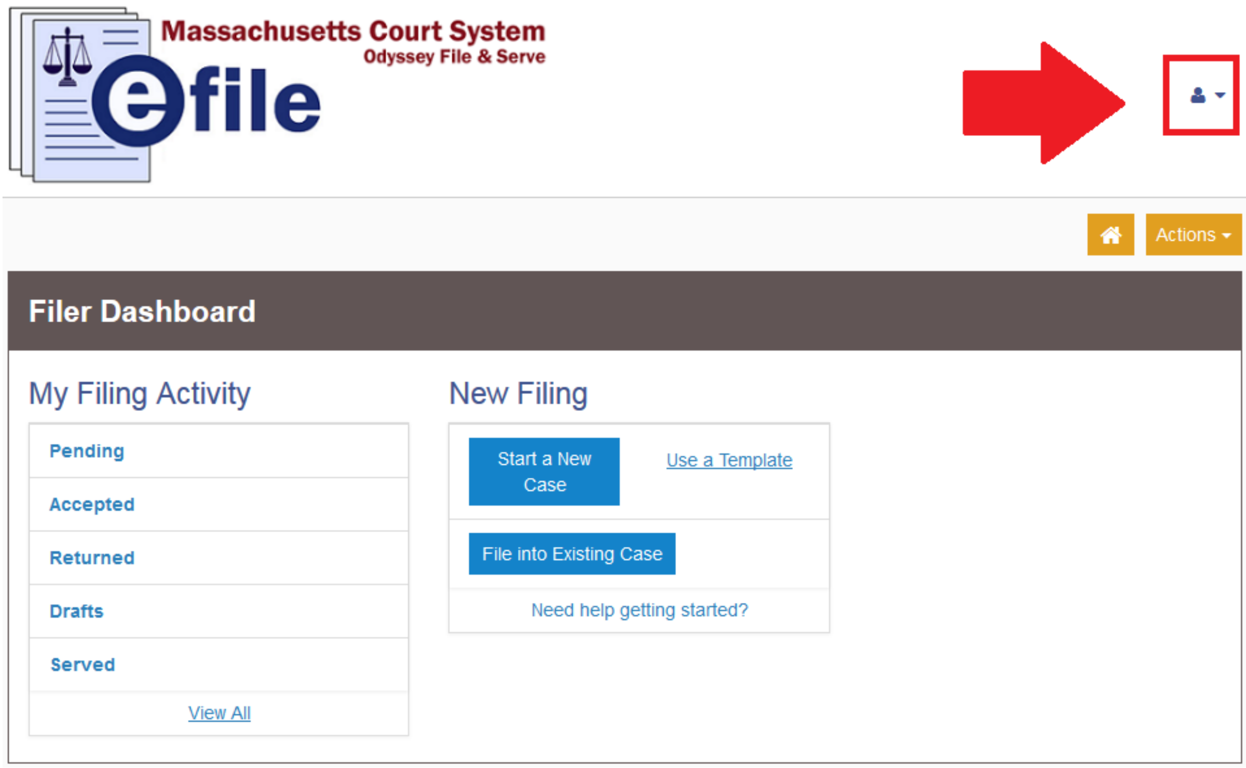
Should you encounter any problems creating your account and you are sure you have followed the previous steps correctly, please call Tyler Support at 1.800.297.5377

<u>Please do not call the Clerk's Office with technical support related questions.</u>

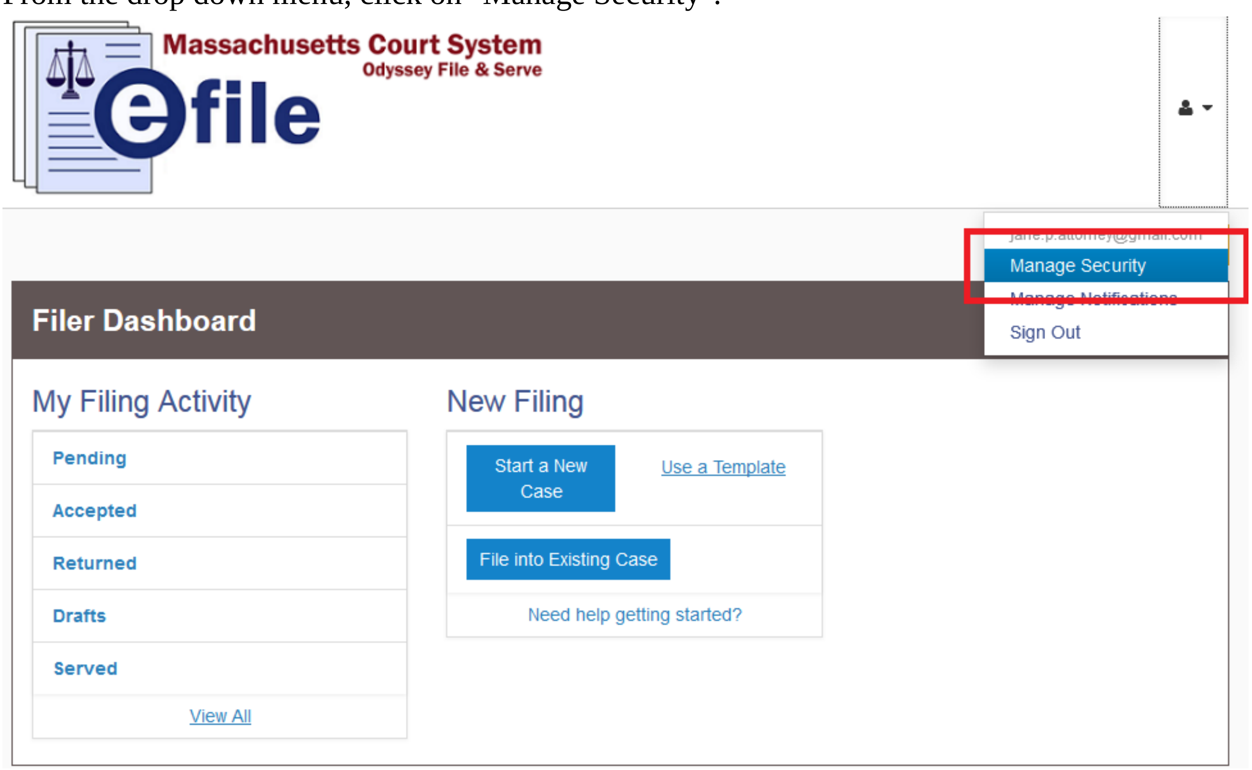
CHANGING YOUR PASSWORD

Follow these steps to change the password for your account.

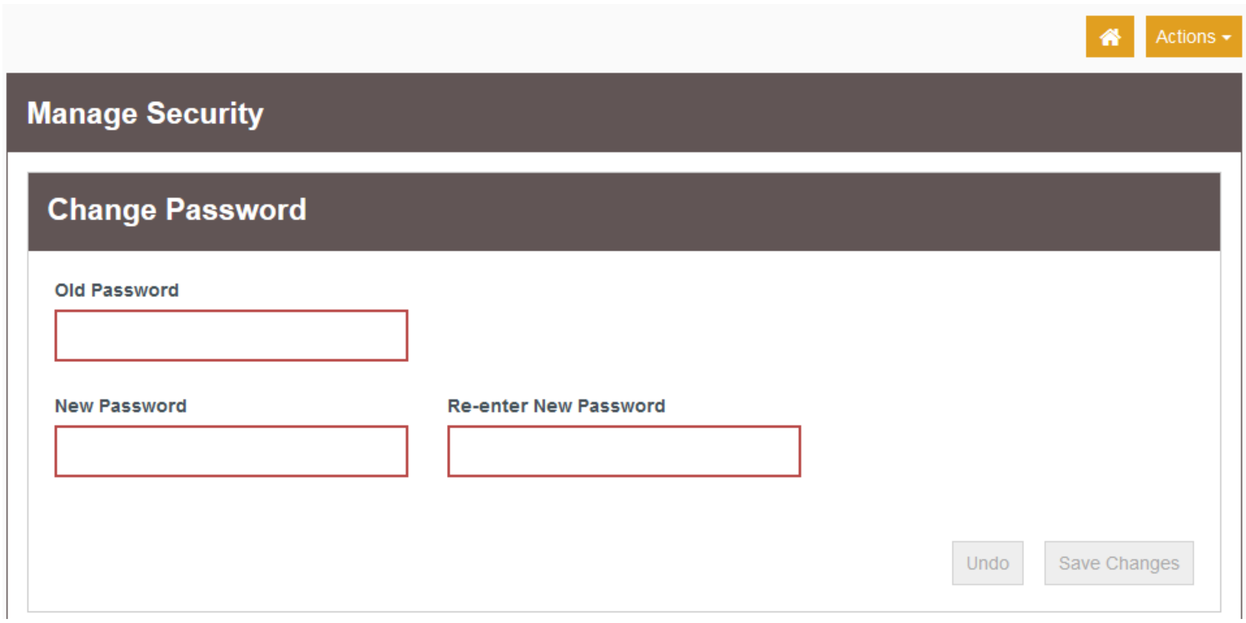
1. Click the grey outline of a person on the top right of the home screen:



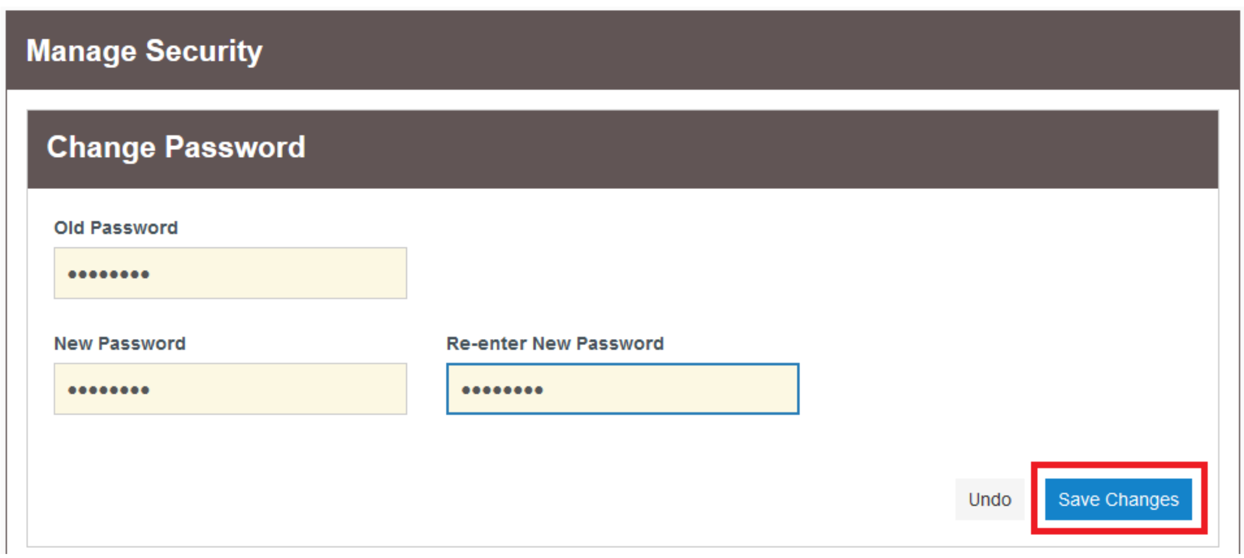
2. From the drop down menu, click on "Manage Security":



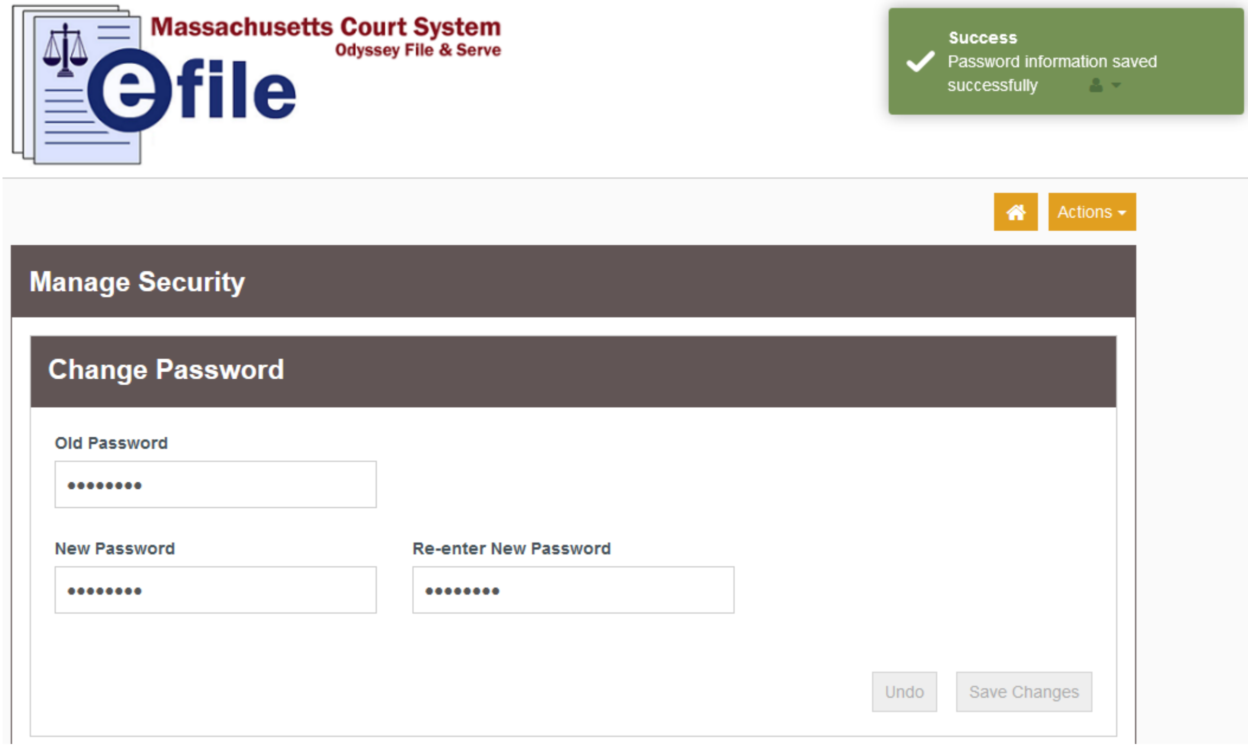
3. The first thing on this screen is a "Change Password" section:



4. Enter your Old Password in the first box. Enter what you wish your password to be updated to in the second two boxes. Click the "Save Changes" button:



5. When your password is updated successfully, you will see a notification in the top right of the screen:



Should you encounter any problems changing your password 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.

SUBMITTING FILINGS

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: [link]

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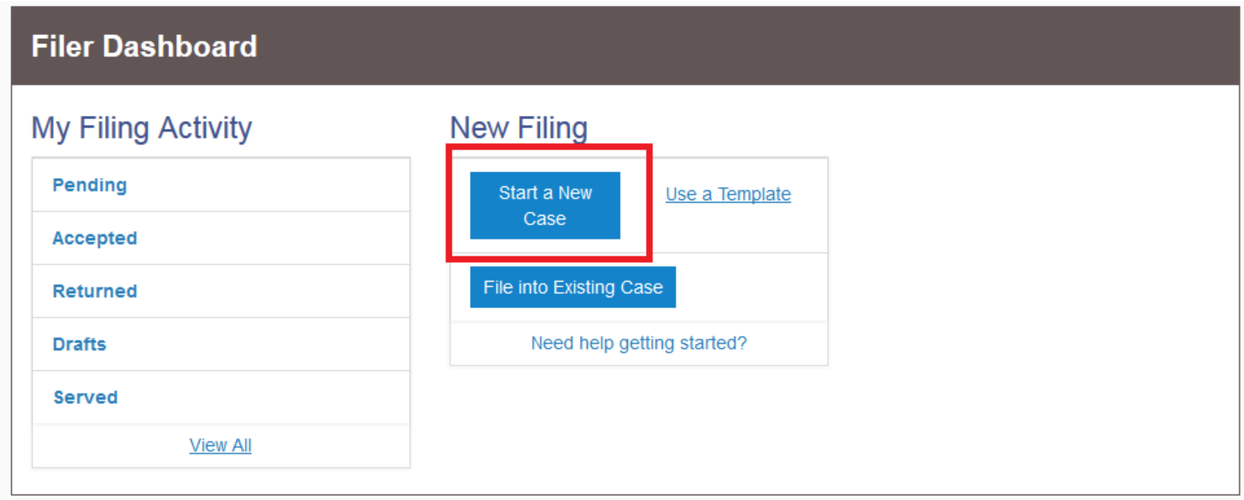
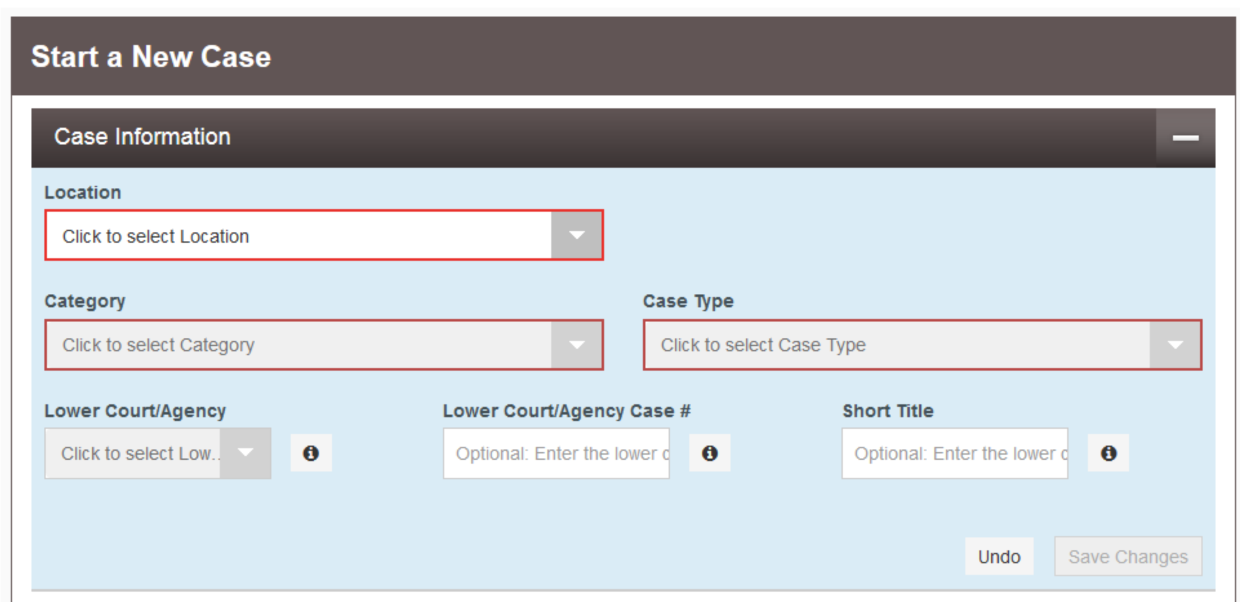
1. On the screen that displays when you first sign in, click the blue "Start a New Case" button:



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

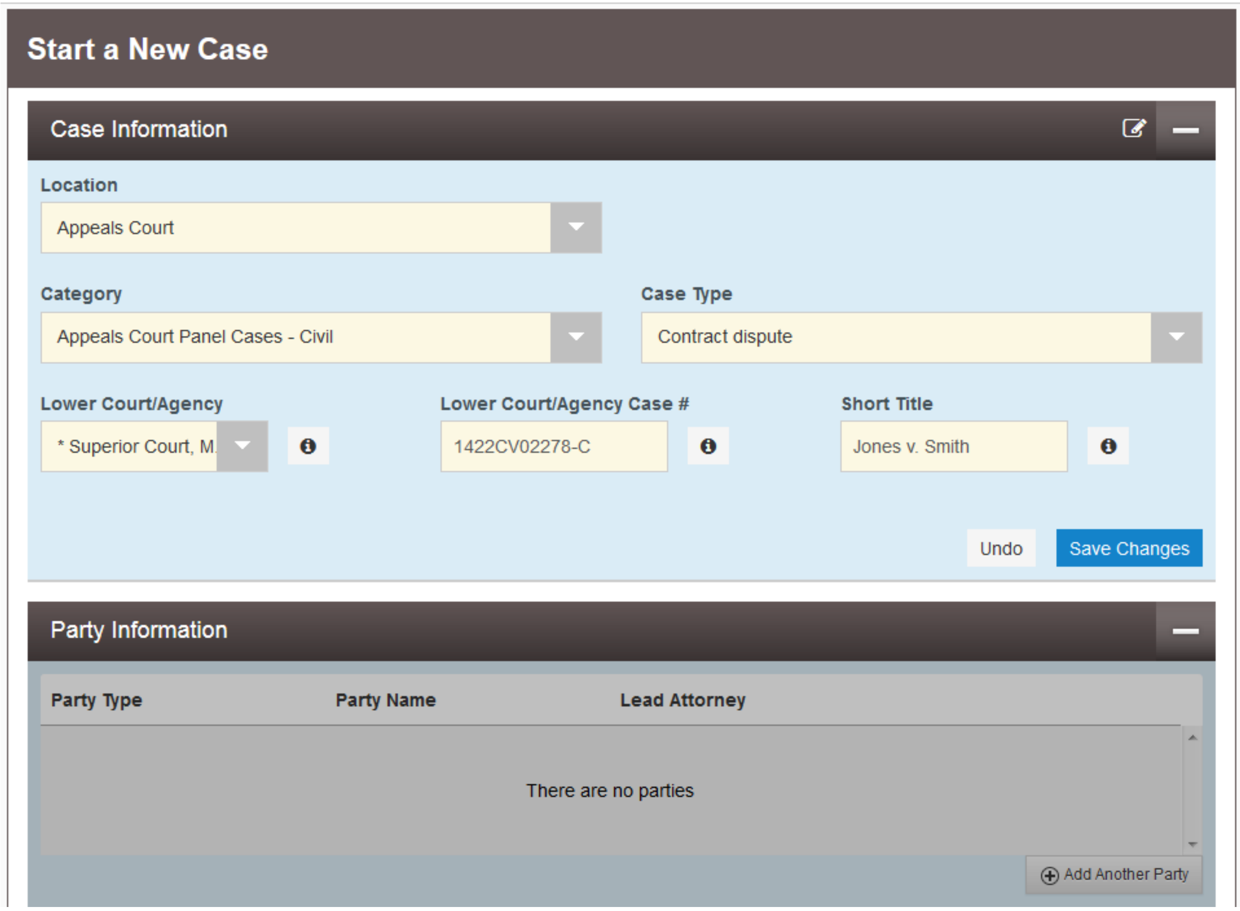


Required Fields:

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.

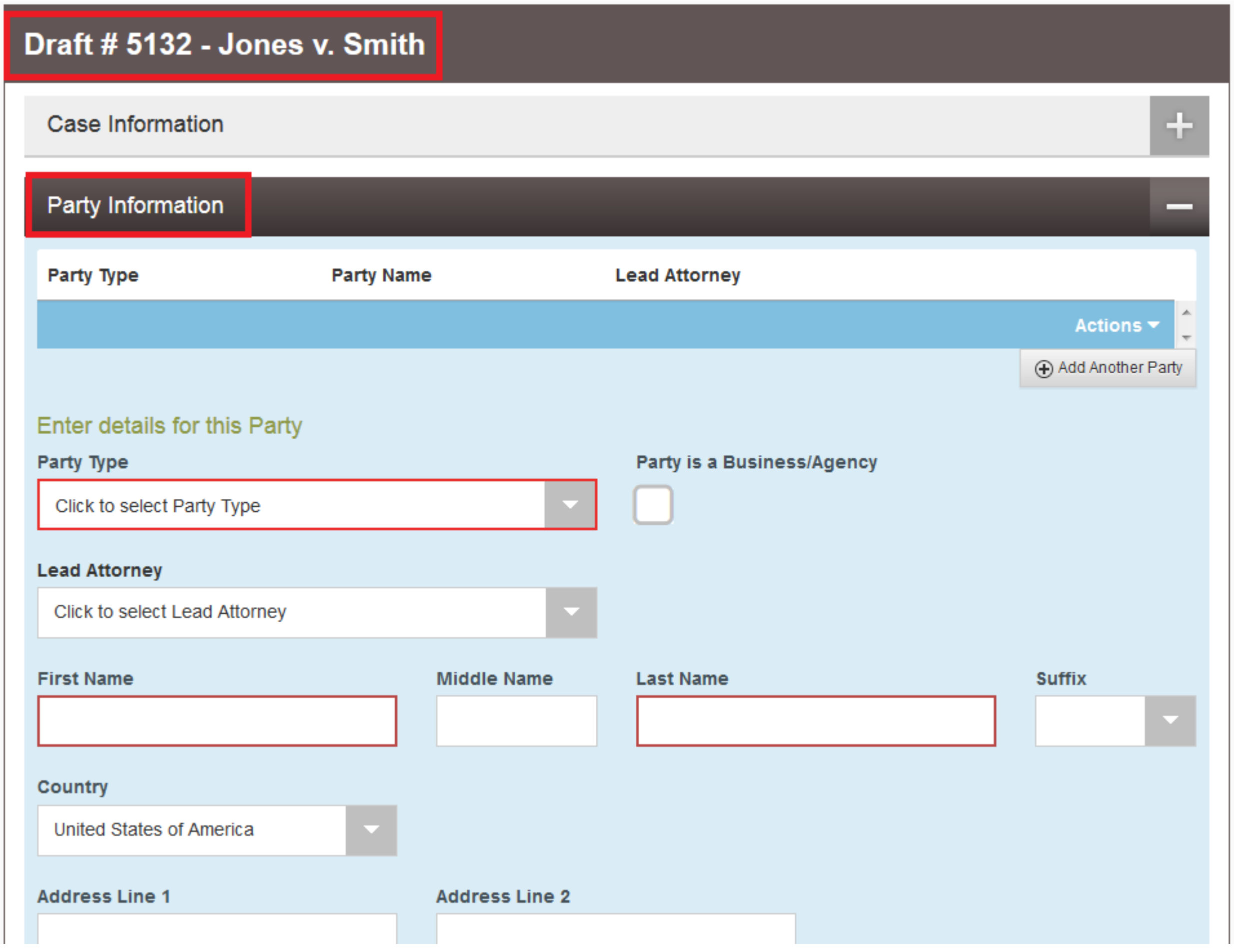
Optional Fields:

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)



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.



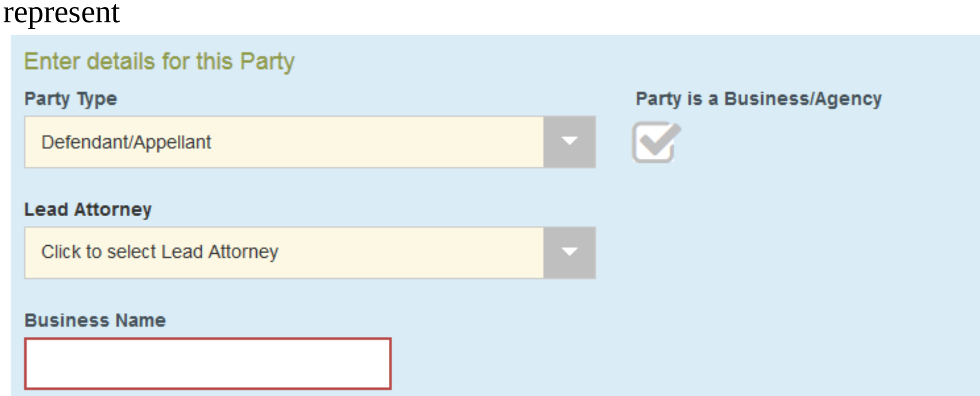
Fill out the information in this section *for each party in the case*.

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

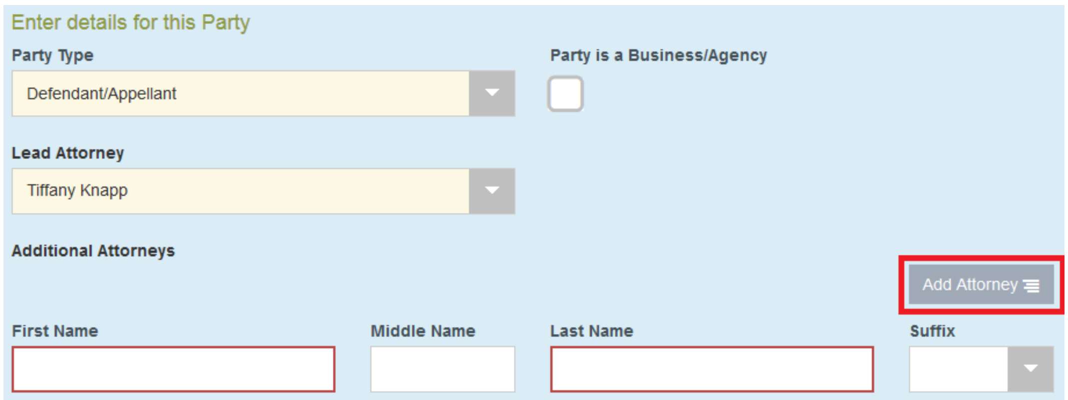


Optional Fields:

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).

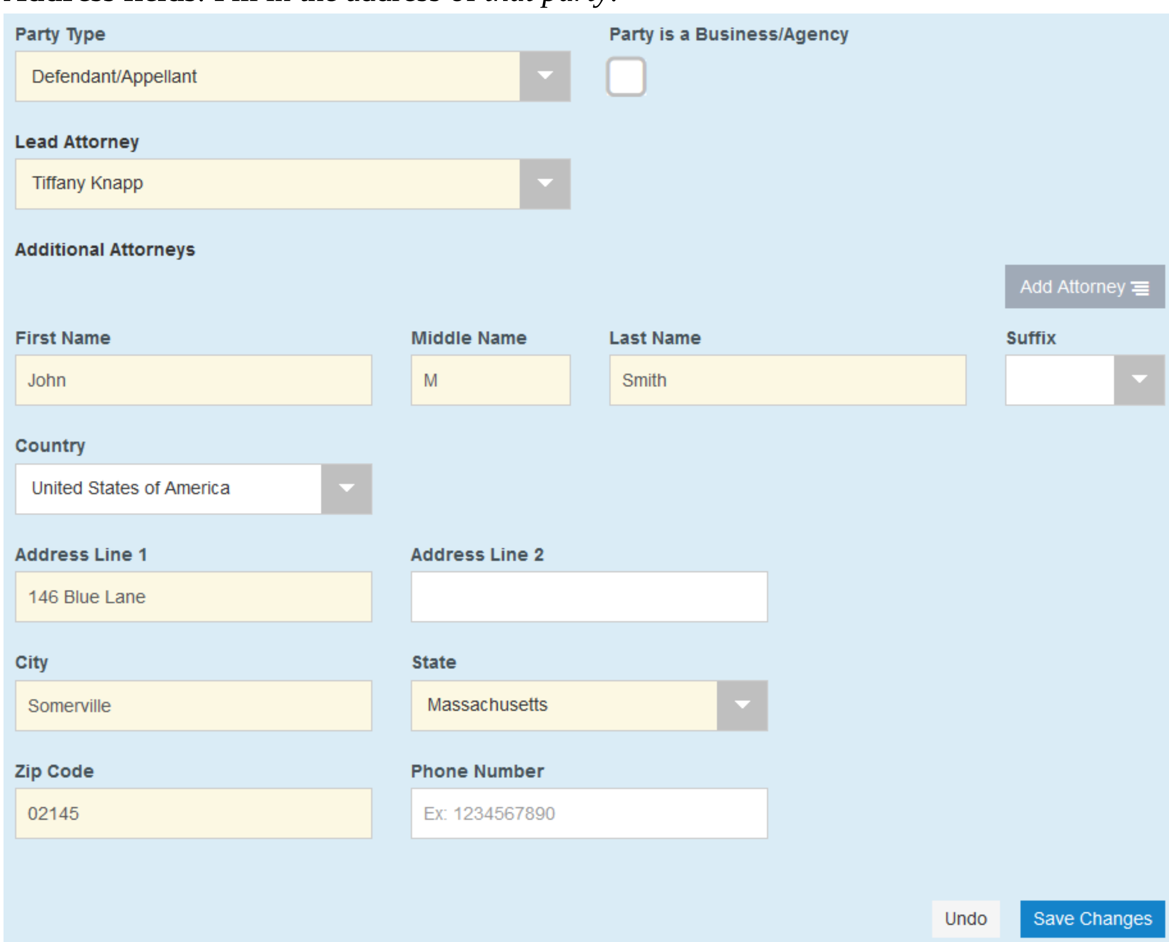
For the party you represent, select the attorney who is lead on this case. *Though there is a "Pro Se" option, do not select it. Pro se filings are not accepted via e-filing at this time.*

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



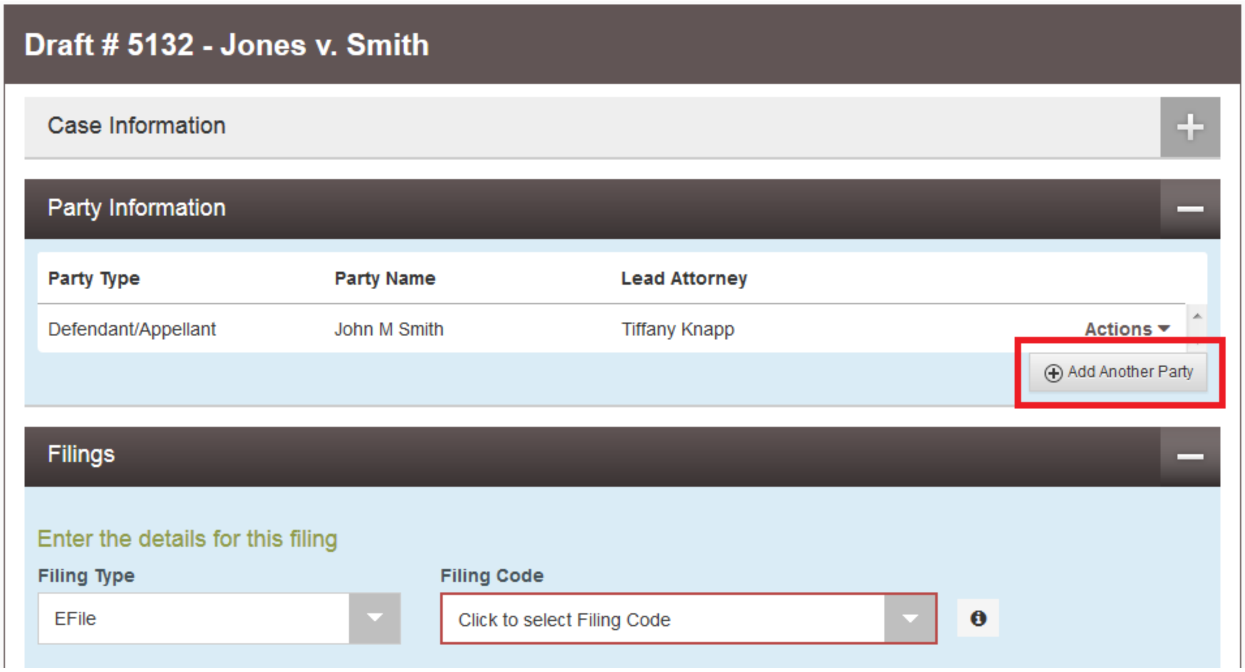
For all other parties (e.g., opposing parties), selecting counsel is not necessary.

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



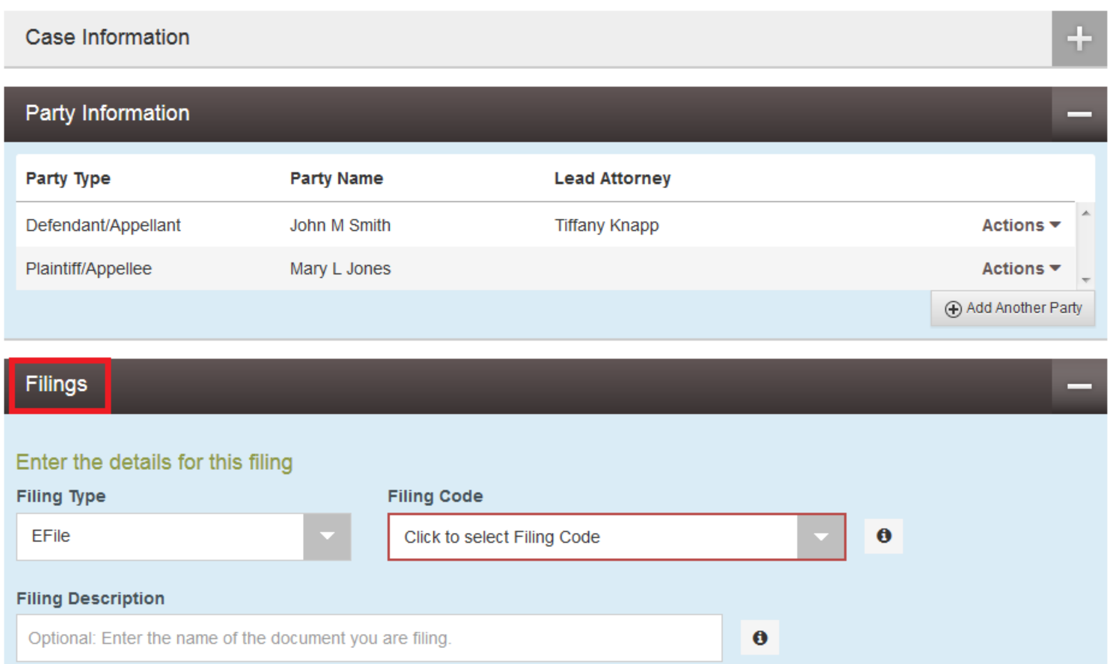
When all required fields are completed, click the blue "Save Changes" button.

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



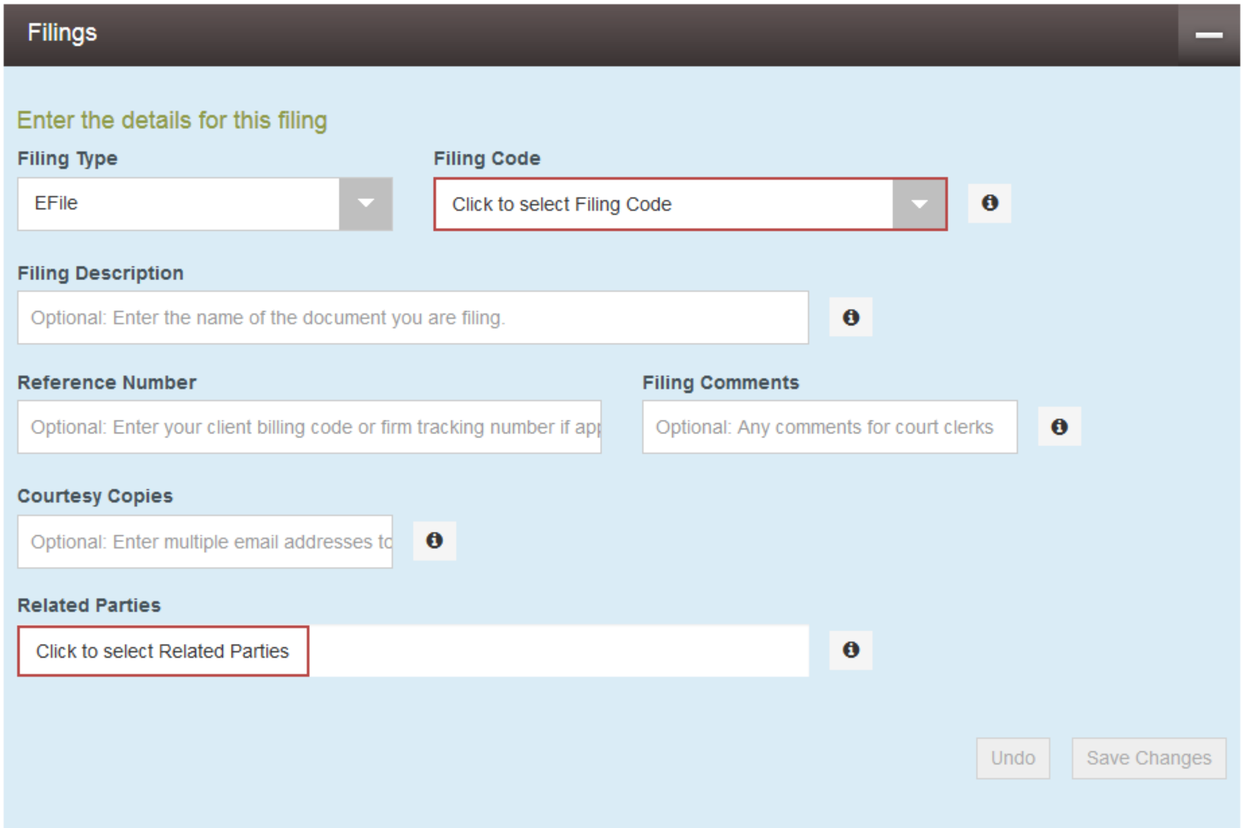
Fill in the information for all remaining party as you did for the first party. Click "Save Changes" after each party.

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



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.



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:

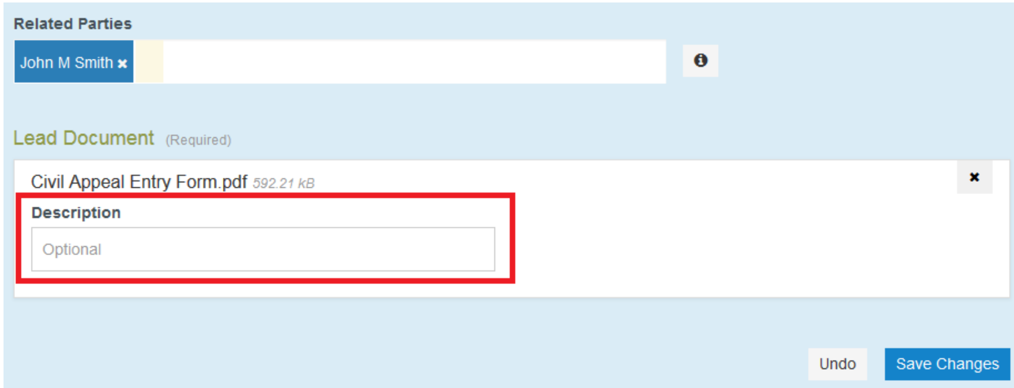
Filing Description: The name of the document being filed.

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

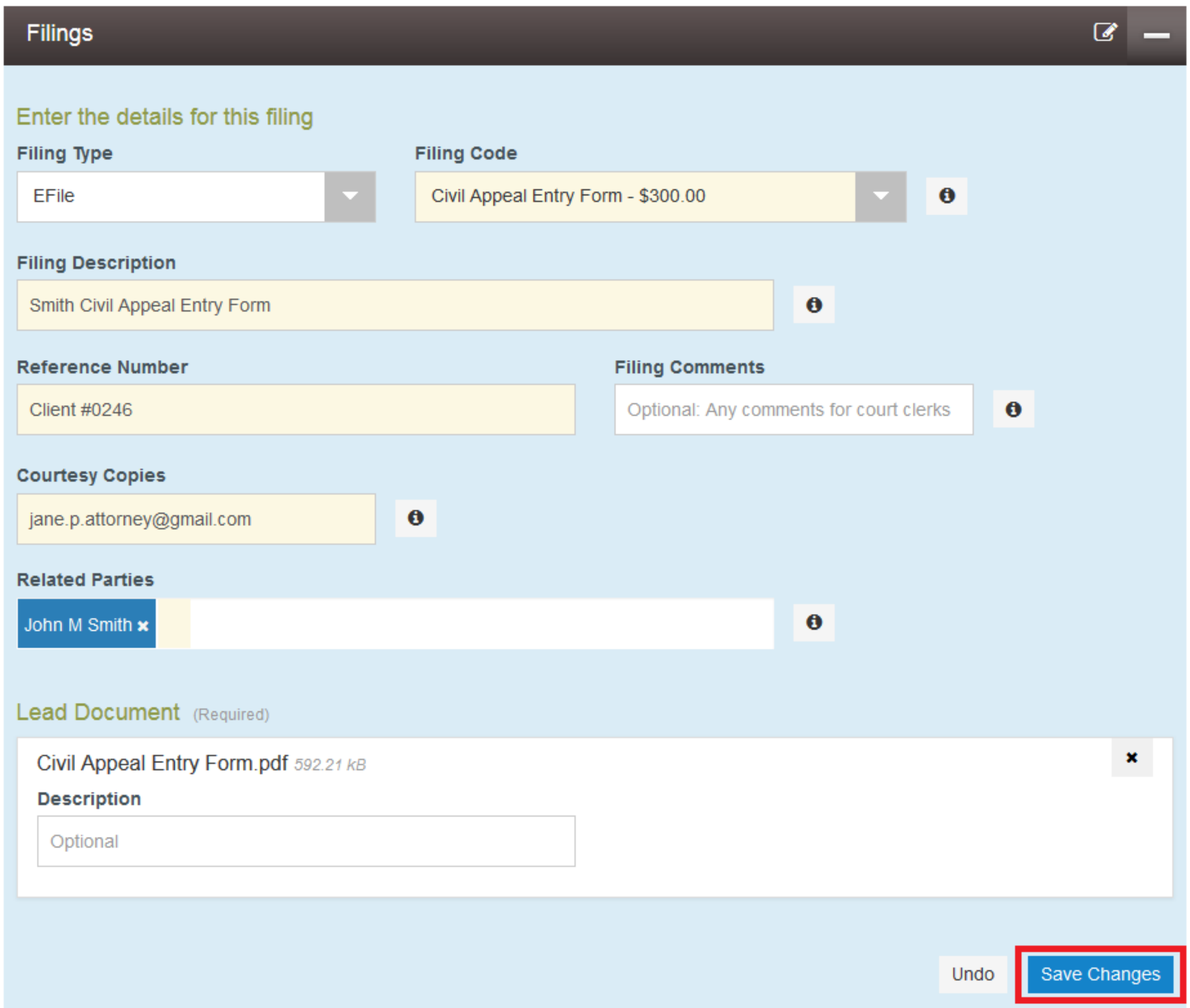
Filing Comments: This field is for any comments you wish for the clerk to see with your filing when it is being reviewed.

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.

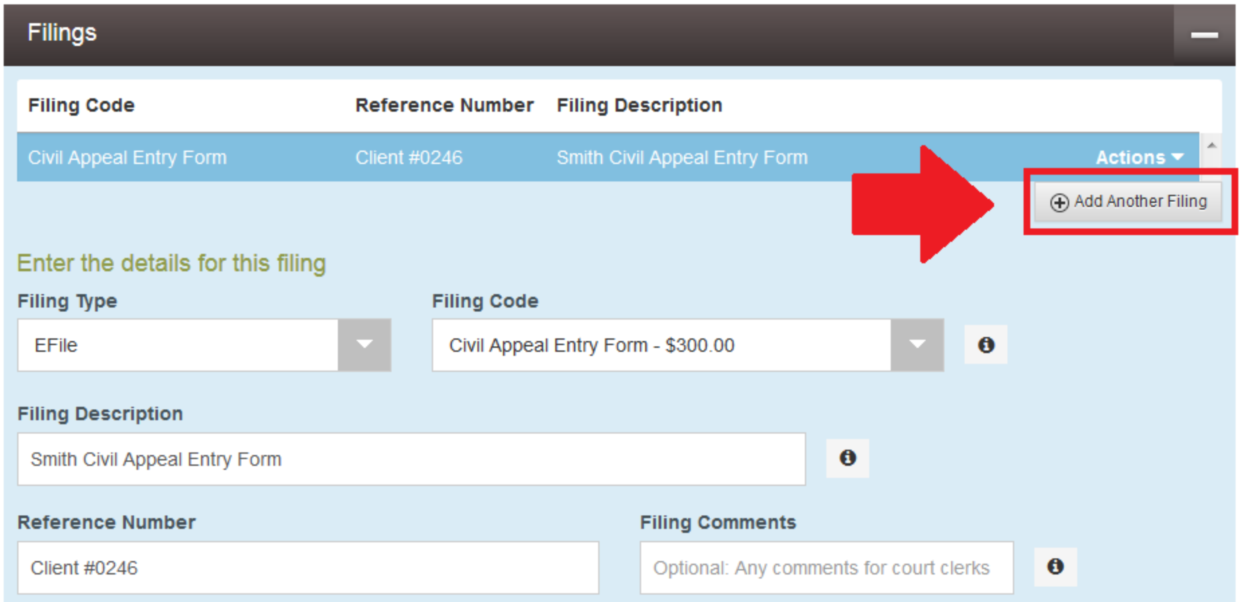
Description: When a document is uploaded, a Description field appears below the document. Enter a description of the document here if you would like.



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

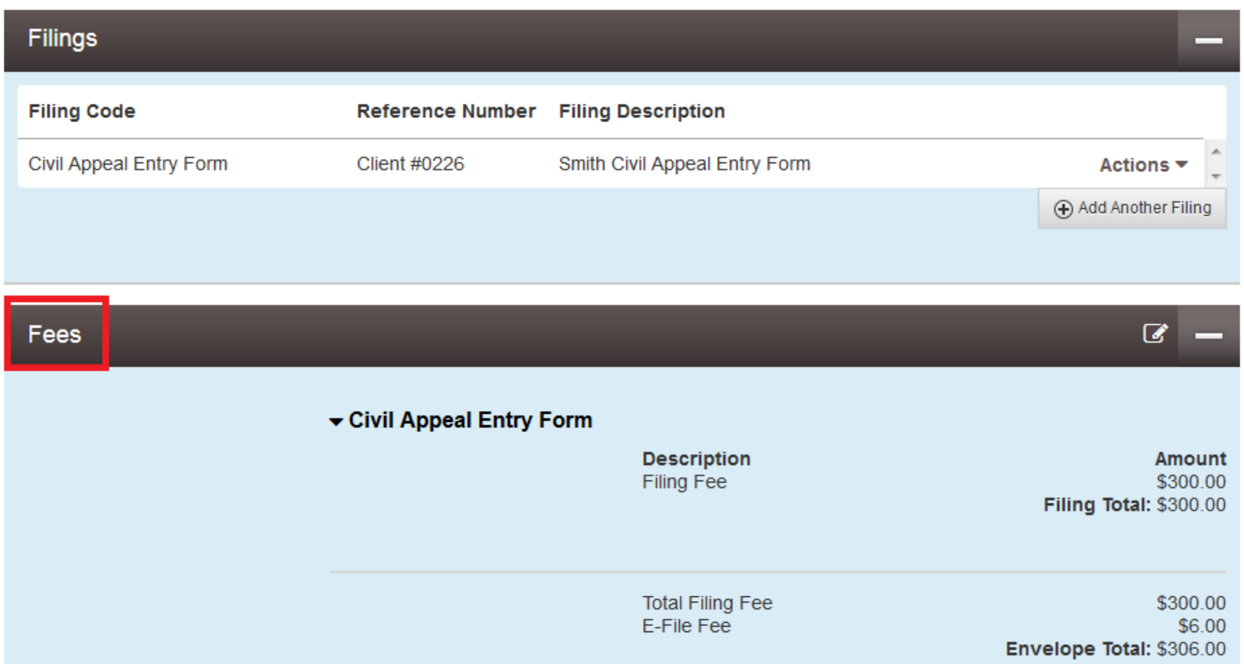


To enter more than one form for multiple appellants, click the "Add Another Filing" button near the top of the Filings section of your envelope:

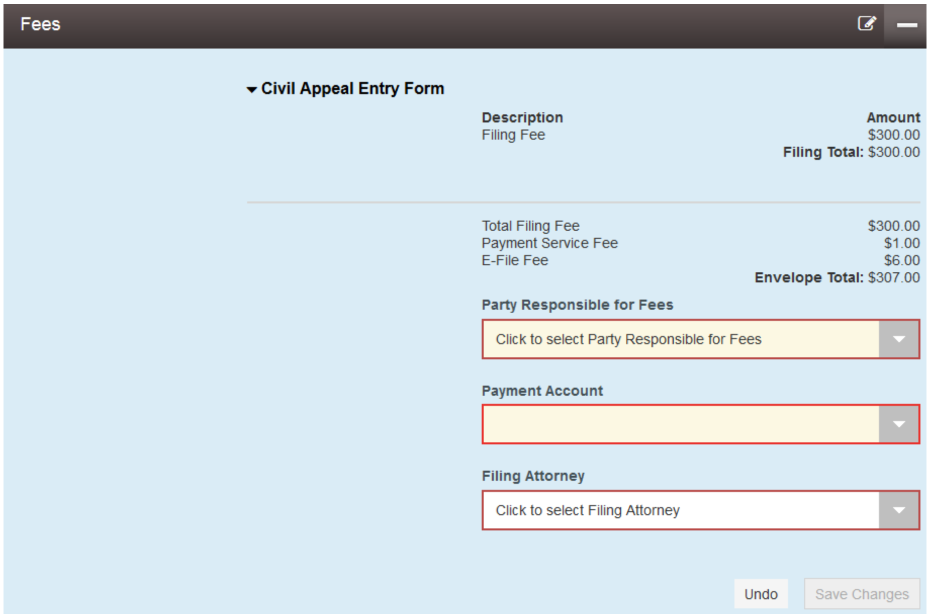


Fill in all required information for each form, clicking "Save Changes" after each document.

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



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.



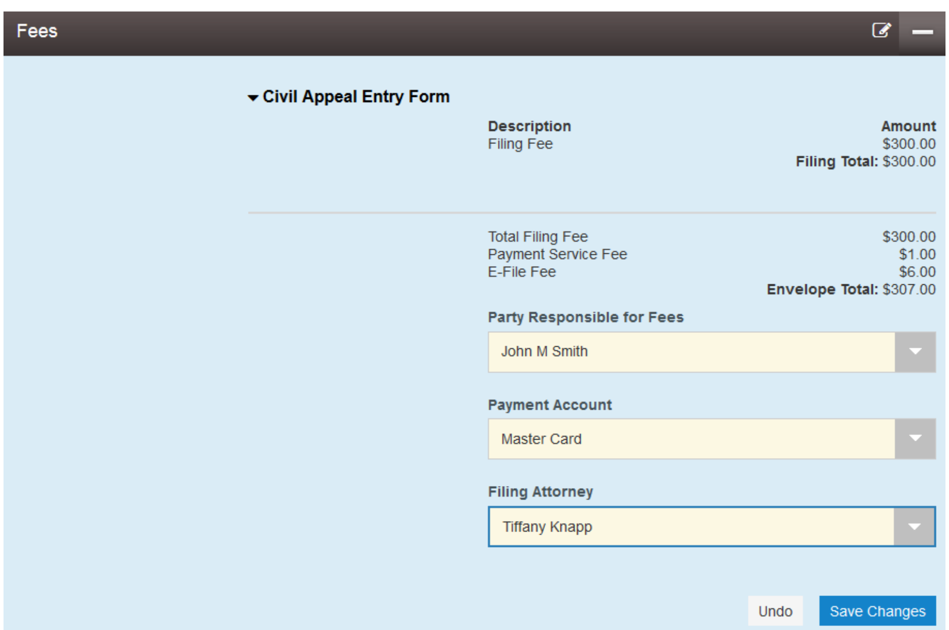
All of these fields are required.

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.

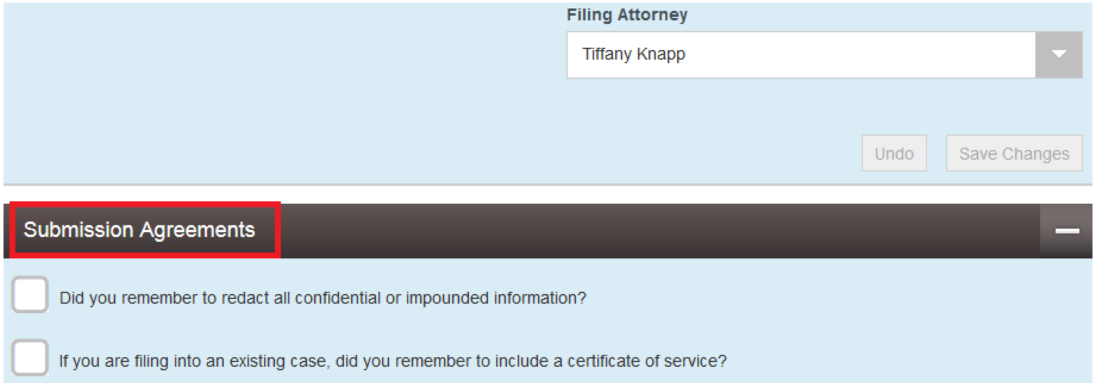
Payment Account: This dropdown lists all Payment Accounts associated with your firm (see separate guide on how to add payment accounts to your firm). Select the method of payment for the filing fees associated with this filing. *Do not* use a waiver account unless waiver of these court fees has already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

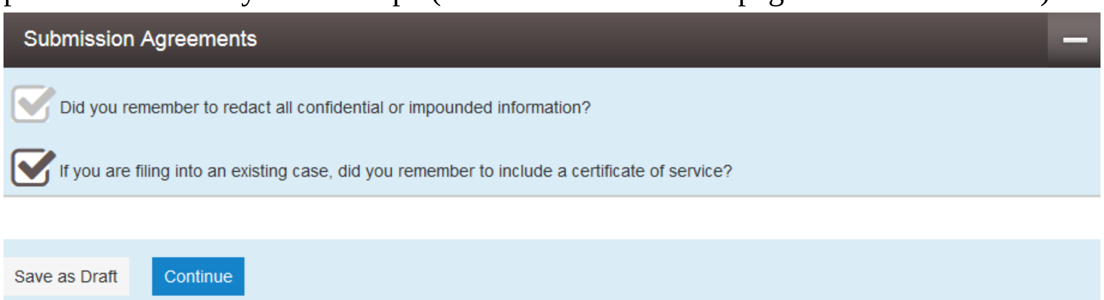


6. Once you have completed the Fee section and saved your changes, the Submission Agreements section becomes available:

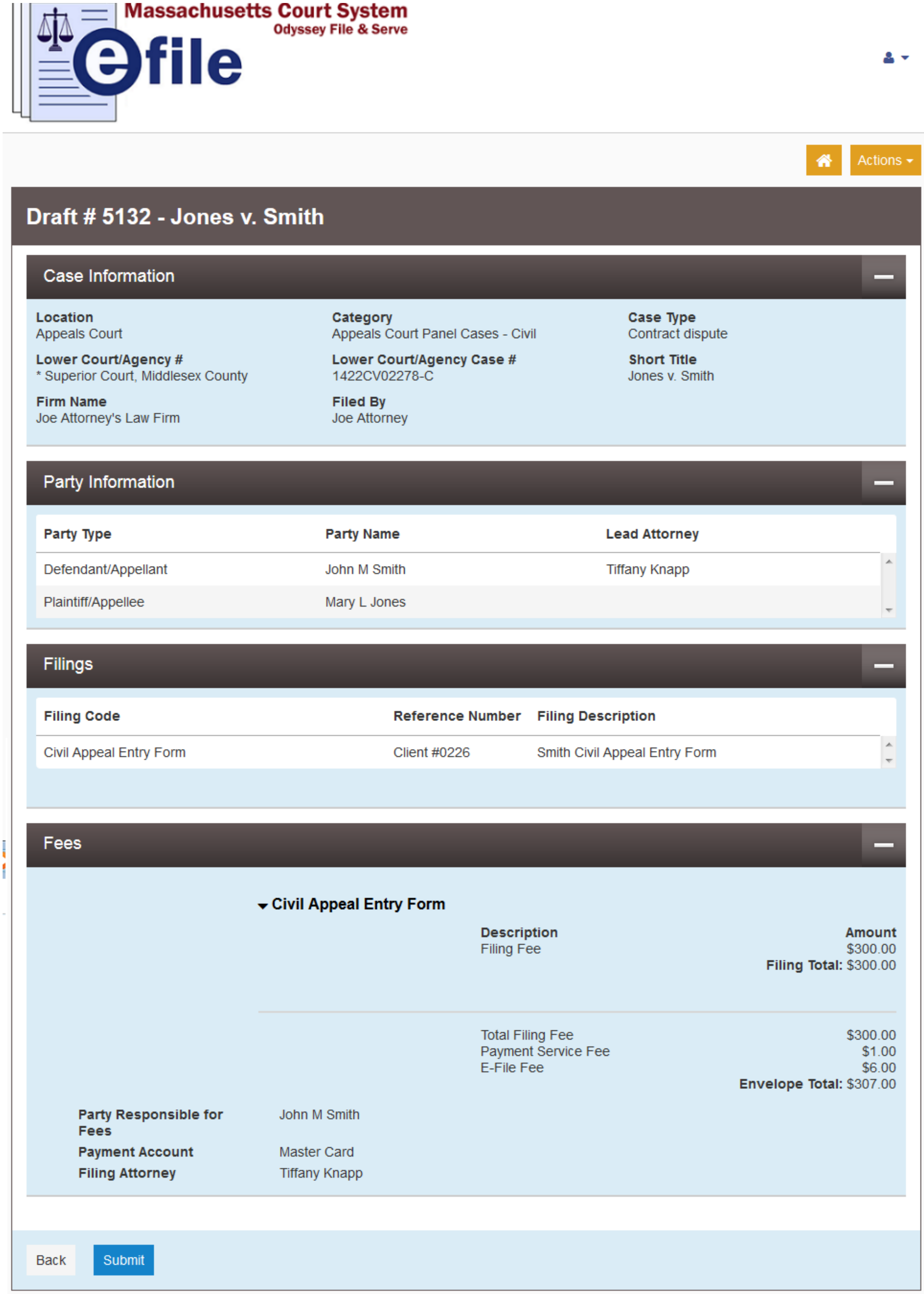


Read both agreements through completely. The first box is required in all cases. The second is only required for subsequent filings. If the answer to the question is yes, check the box beside the agreement statement. If the answer is no, either restart the process with a redacted document or include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

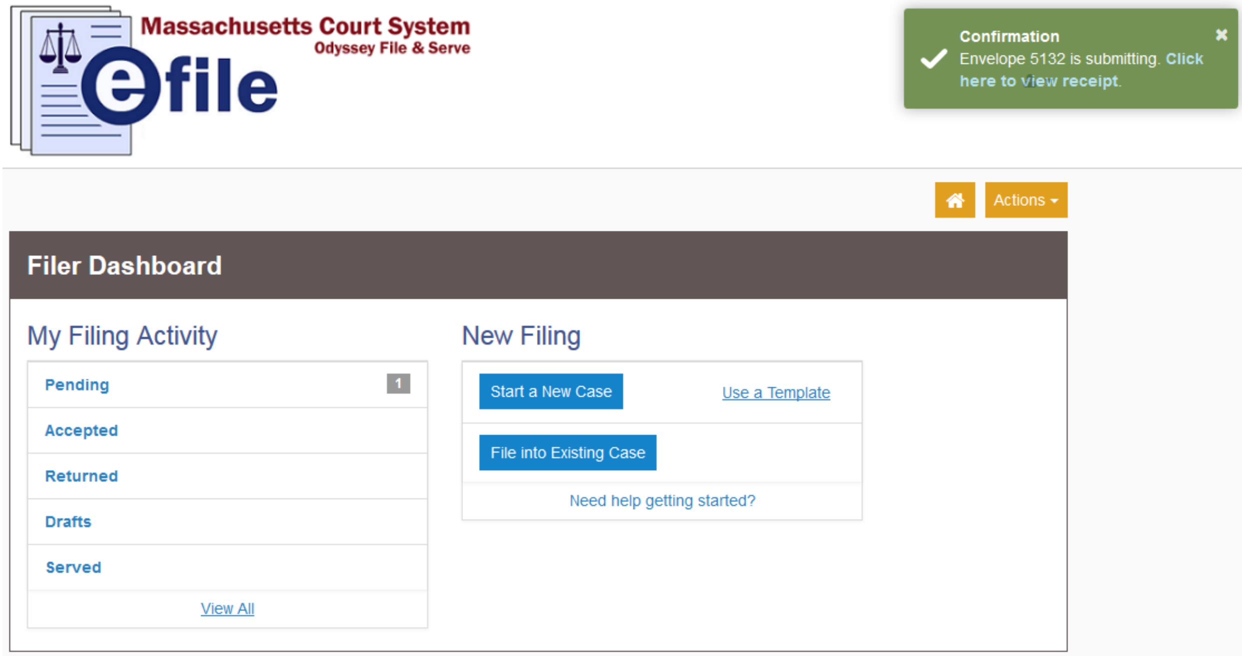


8. Review your envelope on the next page and ensure all of the information is complete and accurate:



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

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		

FILE INTO AN EXISTING CASE

A filing through the Odyssey File & Serve is called an "envelope." An envelope can contain more than one document (e.g., a motion and a brief).

The following items can be submitted into an existing case:

Motions

- Motion for Attorney's Fees
- Motion for Law Student to Argue
- Motion for leave to file amicus brief
- Motion of Appellant to extend date for filing brief and appendix
- Motion of Appellant to extend date for filing Reply Brief
- Motion of Appellee to extend date for filing brief
- Motion to admit counsel pro hac vice
- Motion to consolidate
- Motion to file non-conforming brief
- Motion to file supplemental appendix
- Motion to stay appellate proceedings of Appellant
- Motion to stay appellate proceedings of Appellee
- Motion to waive additional fee
- Motion to withdraw as counsel
- Opposition

Notices

- Notice of appearance
- Notice of change of address of attorney
- Notice of change of counsel

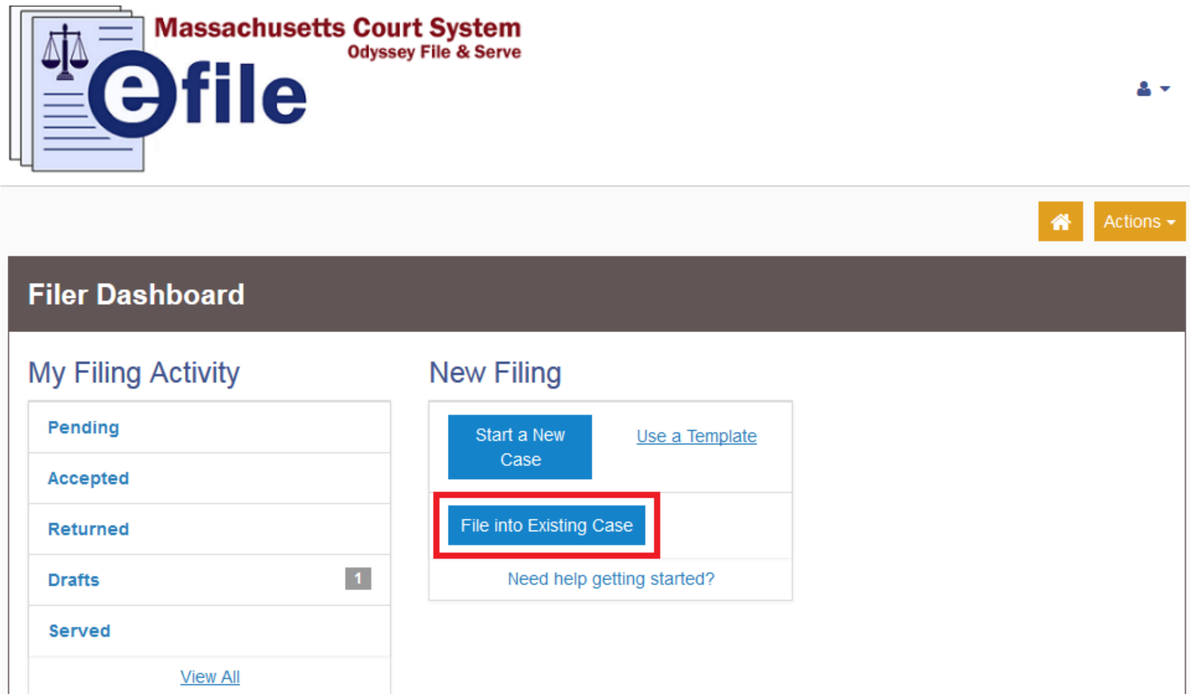
Briefs

- Amicus brief
- Appellant brief
- Appellee brief
- Appendix
- Reply Brief

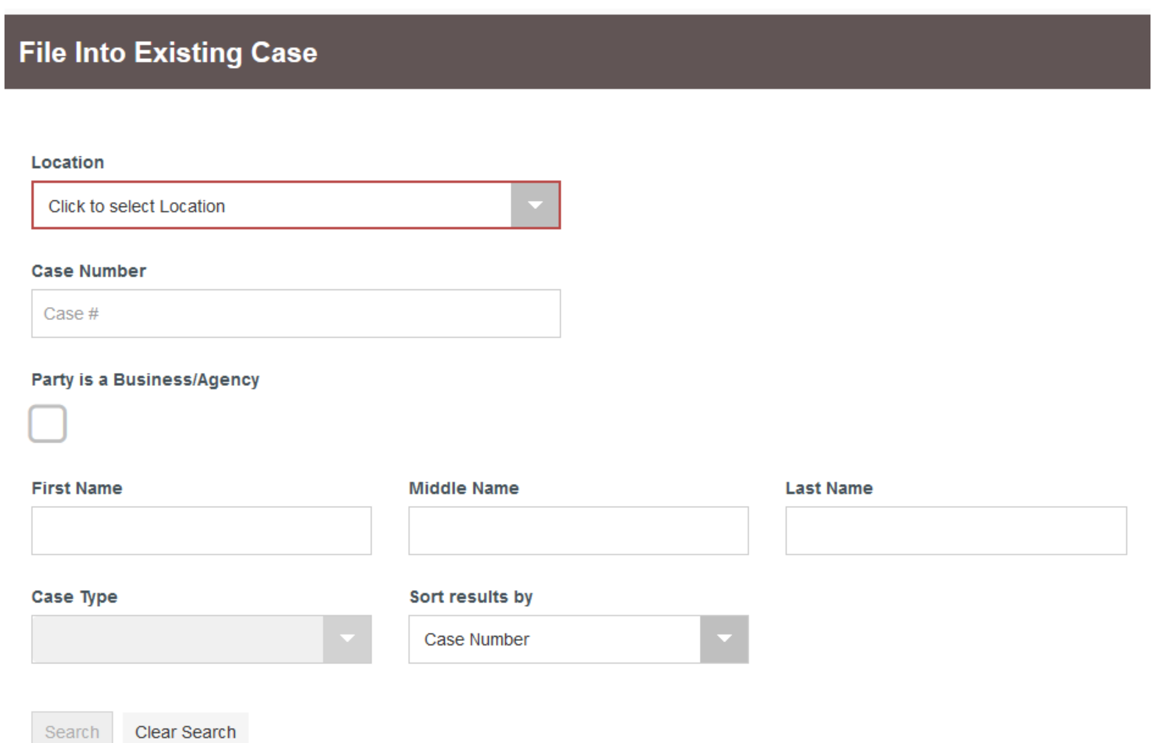
Other

- Civil Appeal Entry Form
- Corporate disclosure statement
- Docketing statement
- Letter pursuant to MRAP 16(l)
- Petition for Rehearing
- Status Report

1. On the screen that displays after you first sign in, click the blue "File into Existing Case" button:



2. In the File Into Existing Case screen, search for the existing case you wish to file into.

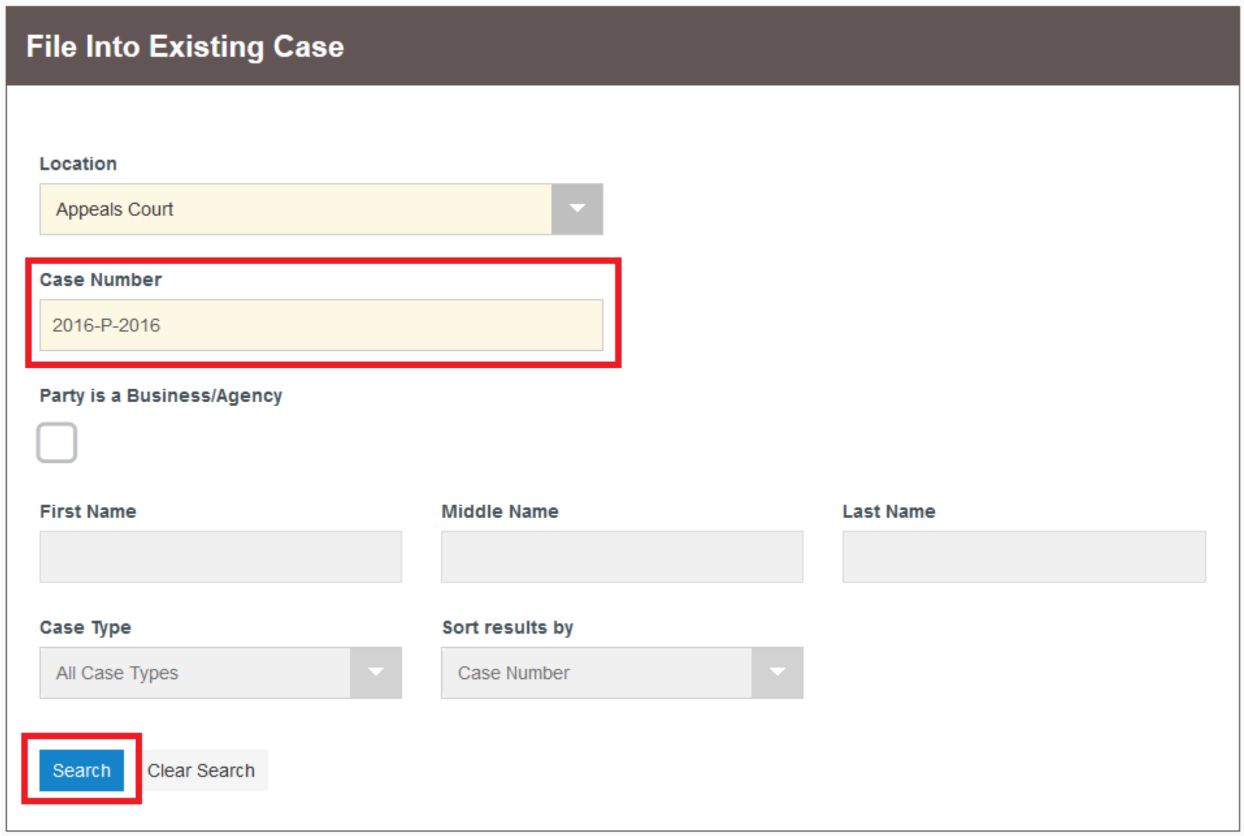


From the Location drop down menu, select "Appeals Court."

There are a number of ways to search for your case:

By Case Number:

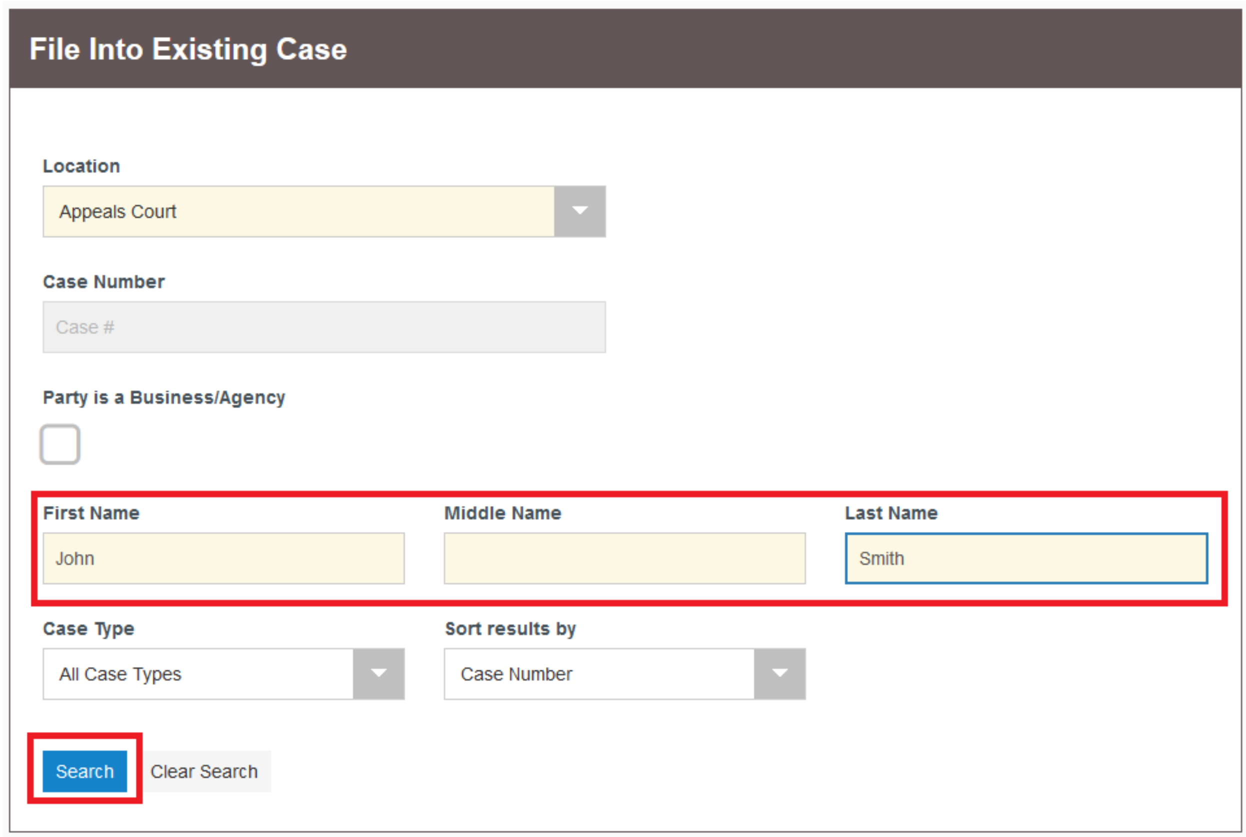
If you know the docket number of the case, enter it in the Case Number text field. This is the best method to search for a case.



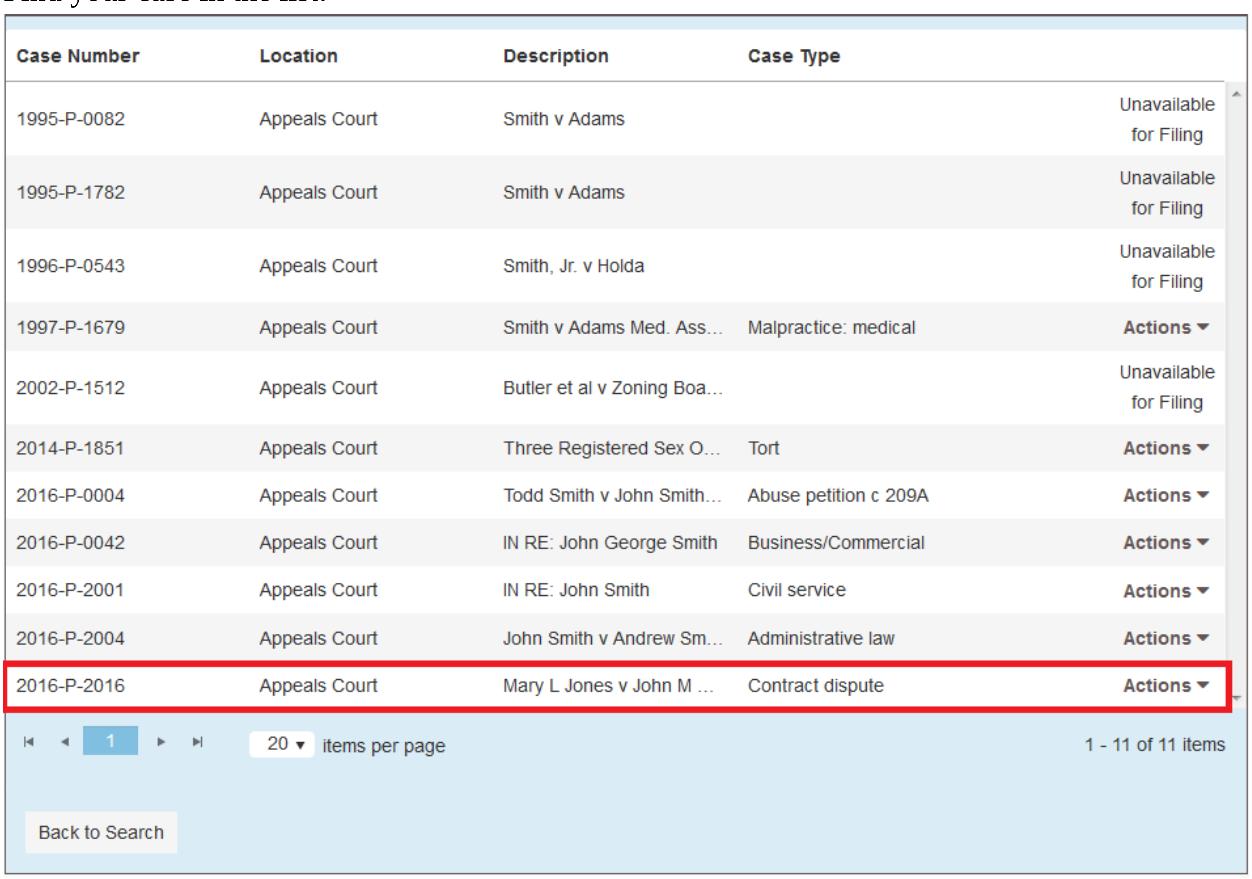
Click "Search." Your case will appear.

By Party Name:

Enter the full name of a party in the case. Then click search.



Find your case in the list:



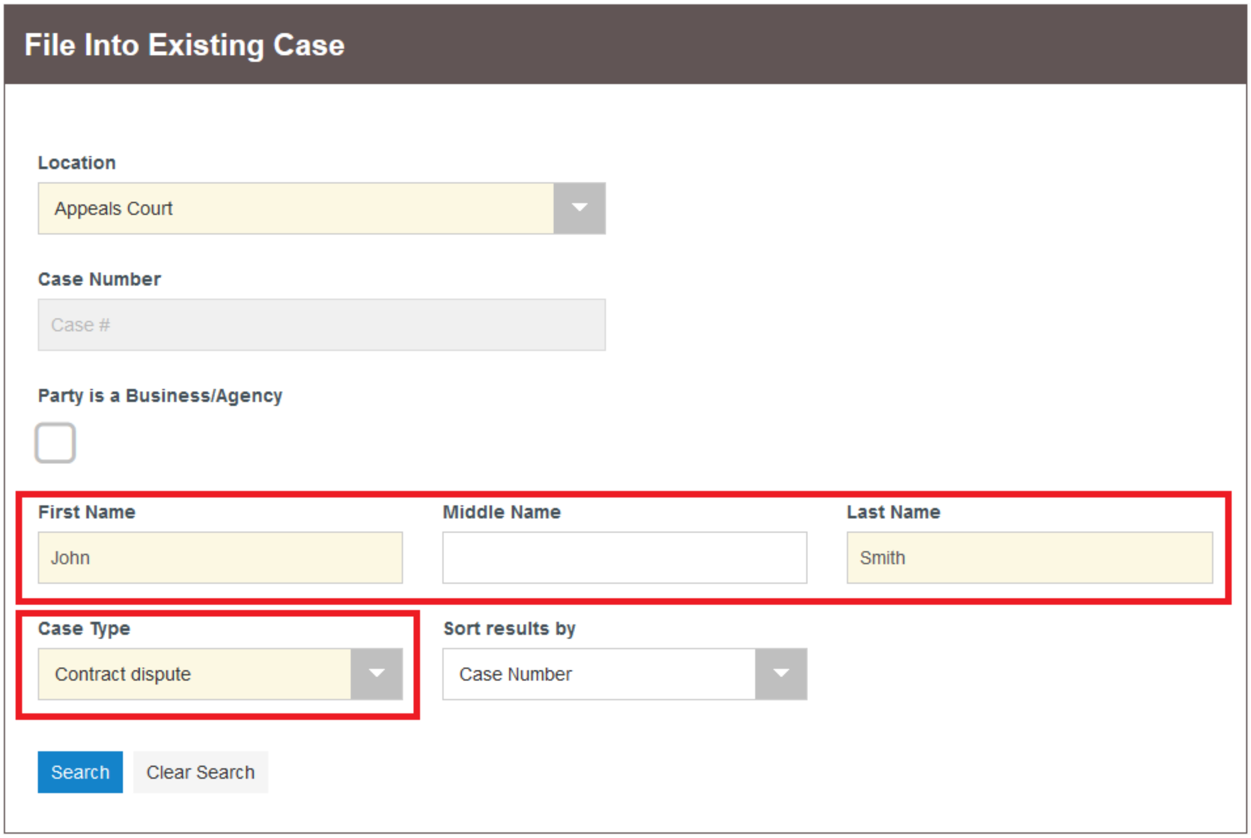
Case Number	Location	Description	Case Type	
1995-P-0082	Appeals Court	Smith v Adams		Unavailable for Filing
1995-P-1782	Appeals Court	Smith v Adams		Unavailable for Filing
1996-P-0543	Appeals Court	Smith, Jr. v Holda		Unavailable for Filing
1997-P-1679	Appeals Court	Smith v Adams Med. Ass…	Malpractice: medical	Actions
2002-P-1512	Appeals Court	Butler et al v Zoning Boa…		Unavailable for Filing
2014-P-1851	Appeals Court	Three Registered Sex O…	Tort	Actions
2016-P-0004	Appeals Court	Todd Smith v John Smith…	Abuse petition c 209A	Actions
2016-P-0042	Appeals Court	IN RE: John George Smith	Business/Commercial	Actions
2016-P-2001	Appeals Court	IN RE: John Smith	Civil service	Actions
2016-P-2004	Appeals Court	John Smith v Andrew Sm…	Administrative law	Actions
2016-P-2016	Appeals Court	Mary L Jones v John M …	Contract dispute	Actions

1 | 20 items per page | 1 - 11 of 11 items

Back to Search

By Case Type:

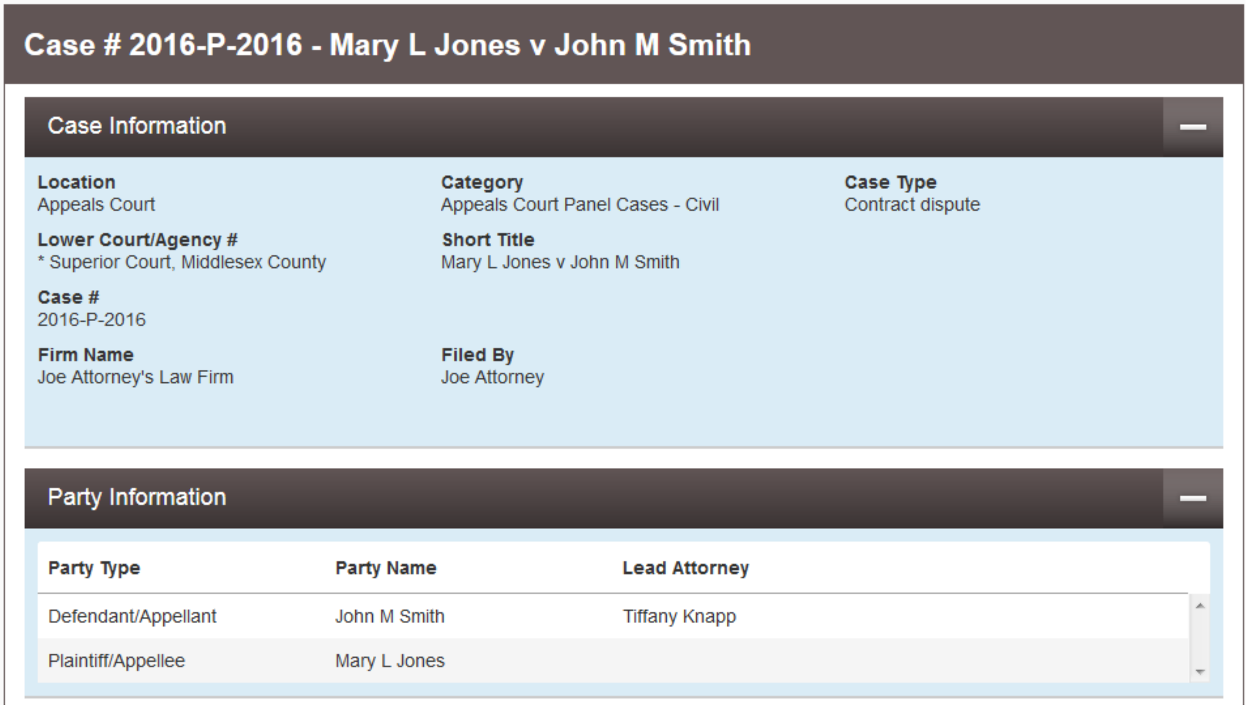
If you know the case type of the case you wish to file into, enter a party name, and select from the Case Type dropdown menu the case type. Click the Search button. Find the appropriate case in the results list:



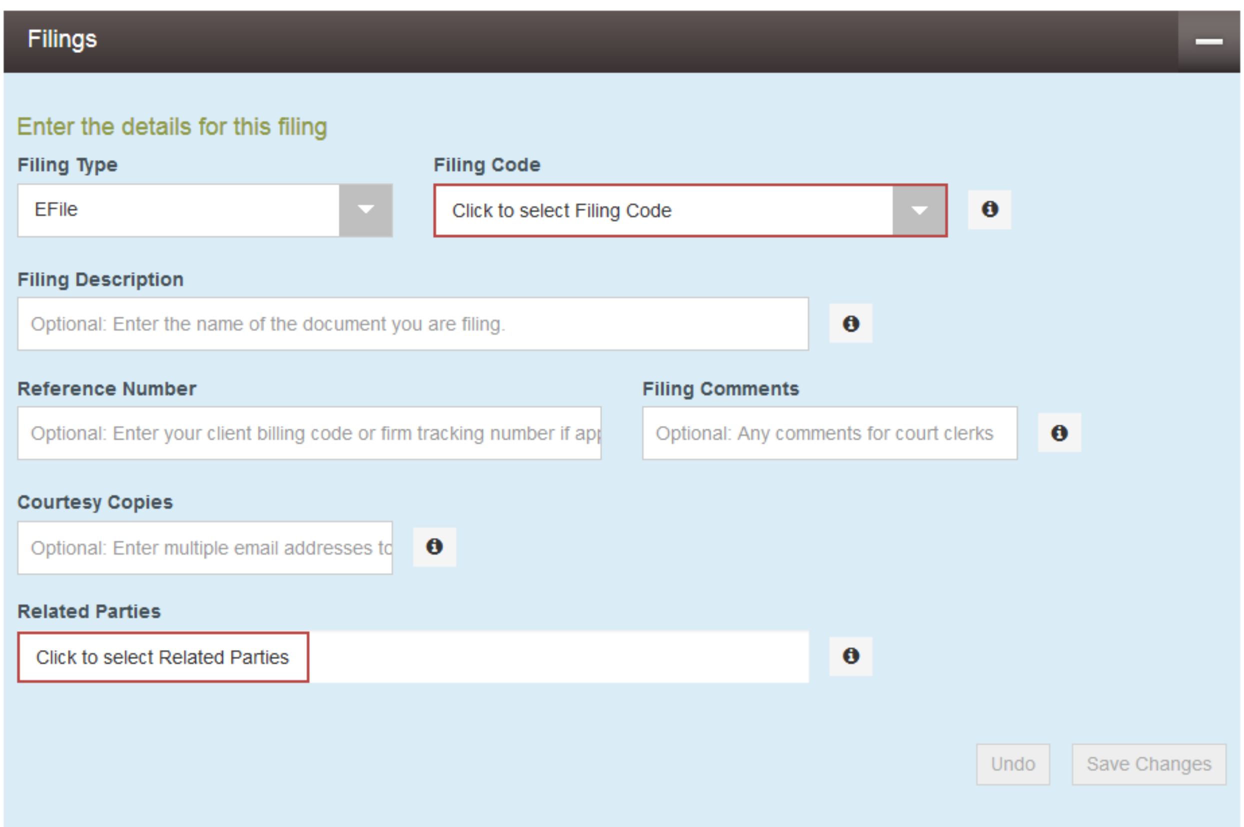
3. No matter which way you find your case, once you have found it in the search results list, click the "Actions" menu to the right of the case listing:

Select "File into Case" from the dropdown menu:

An envelope will be created and appear on your screen with the Case Information and Party Information sections pre-filled in from the Appeals Court database. These sections are not able to be edited, and new parties cannot be added to an existing case via e-filing.



4. The Filings section of the envelope, which is the only active section when the envelope first appears on your screen, is where you upload documents to be submitted to the court.



Required Fields:

Filing Code: From this drop down, select the document you wish to submit to the court.

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 . Only PDF documents are accepted by the system.

Optional Fields:

Filing Description: The name of the document being filed.

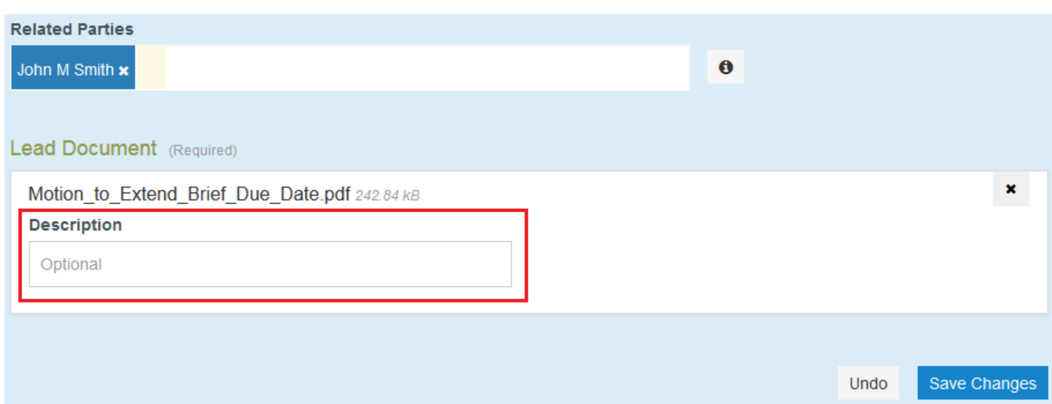
Reference Number: This is for a client billing code or internal tracking number, if applicable. This is for your internal firm use.

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

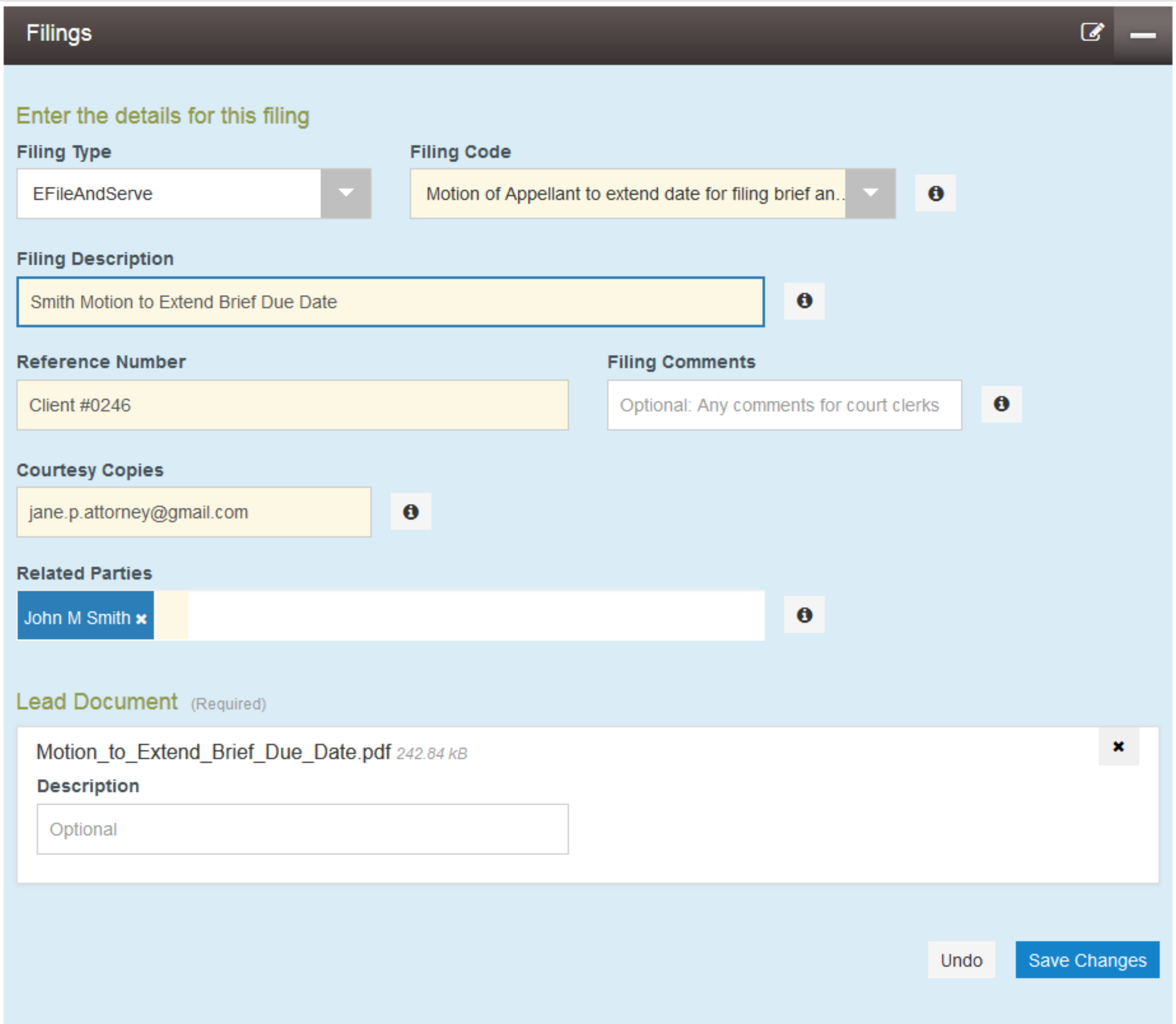
Courtesy Copies: Enter the email address of any person you wish to receive a courtesy copy of this filing. They will receive an email containing a link to download your document upon the Court's acceptance of the filing..

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

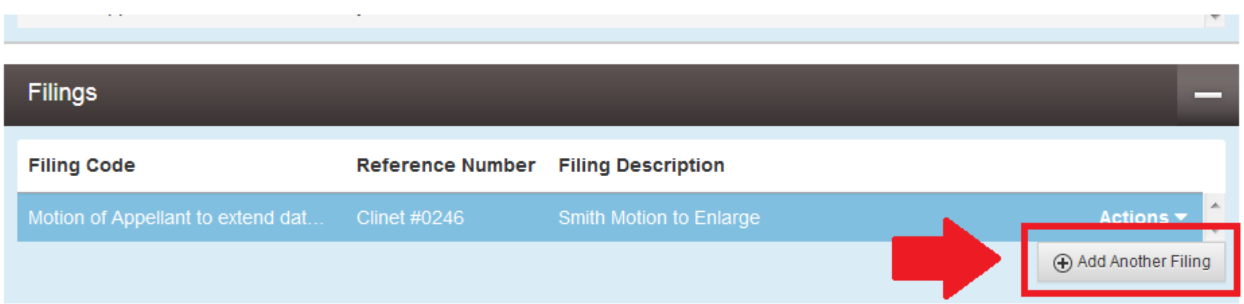
This field is mandatory for multi-volume appendices. See the Appeals Court FAQ Guidance for more information.

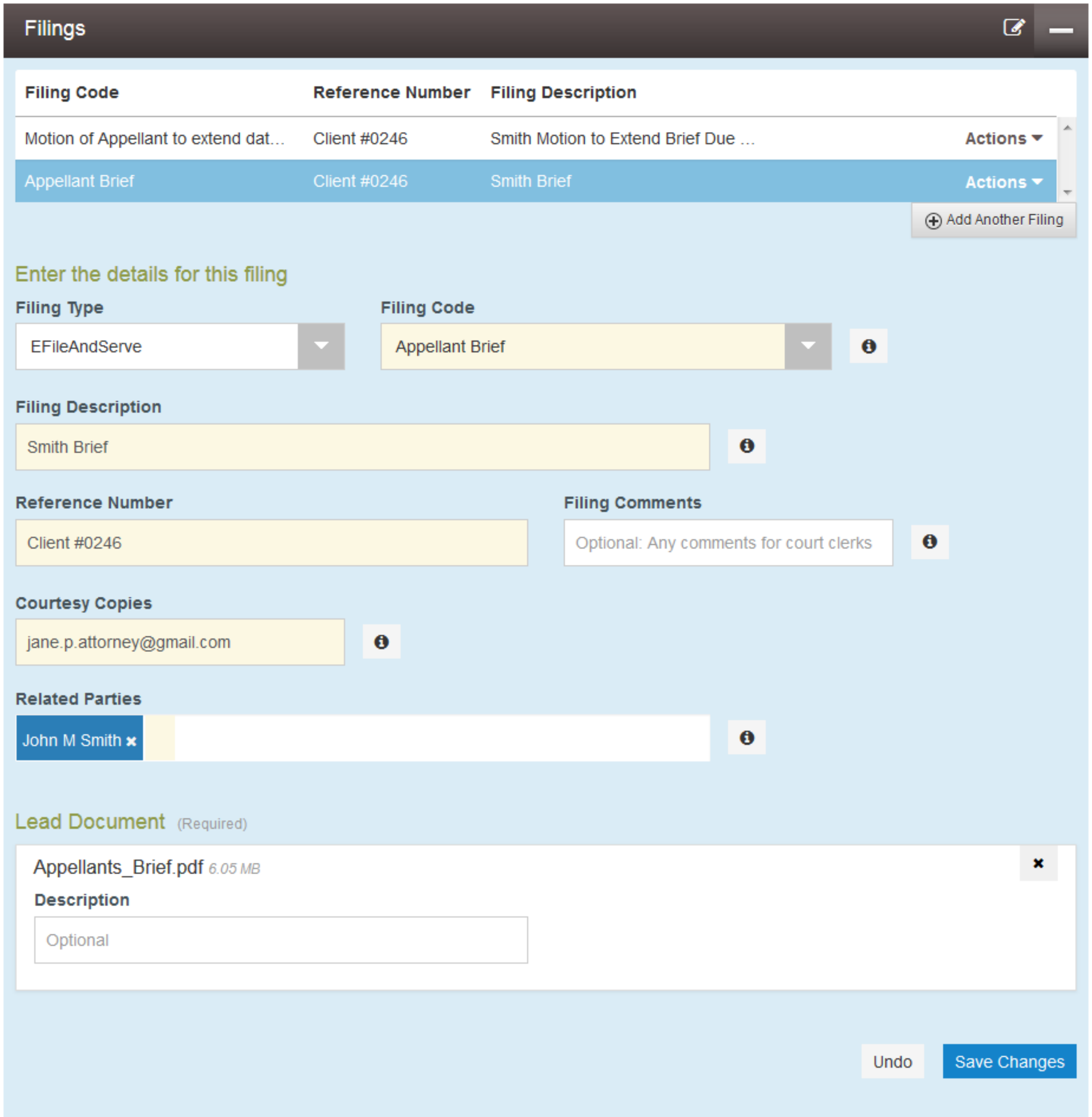


When all of the information is properly entered, click the blue "Save Changes" button

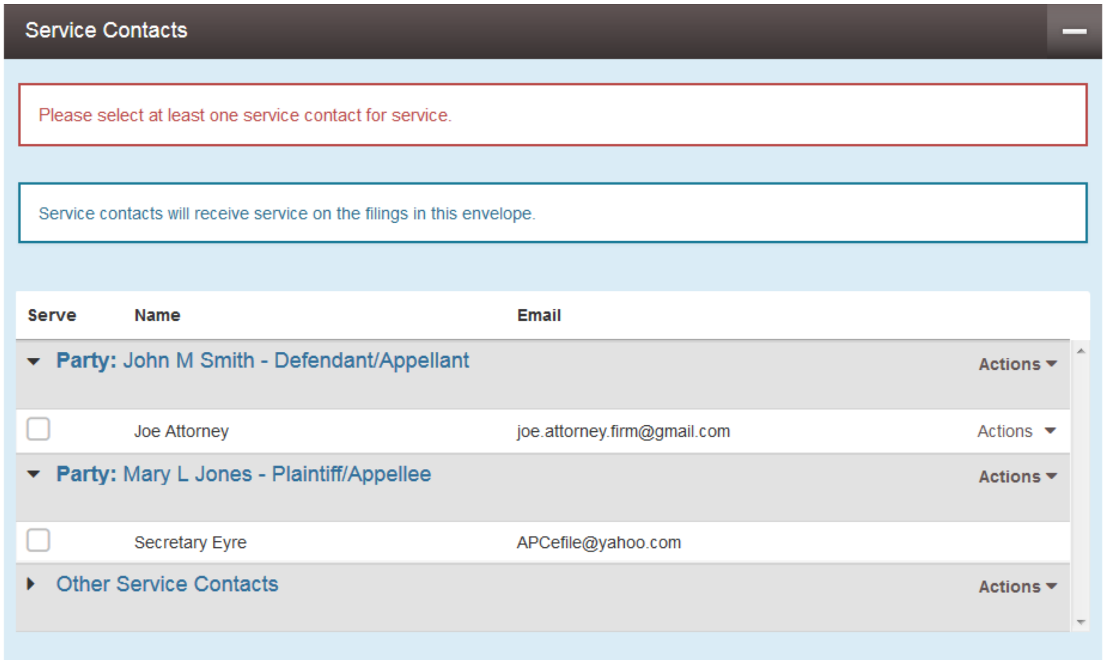


5. You can submit multiple filings for one case within the same envelope. If you wish to submit another filing, click the "Add Another Filing" button at the top of the filings section of the envelope, and complete the information for the additional document:



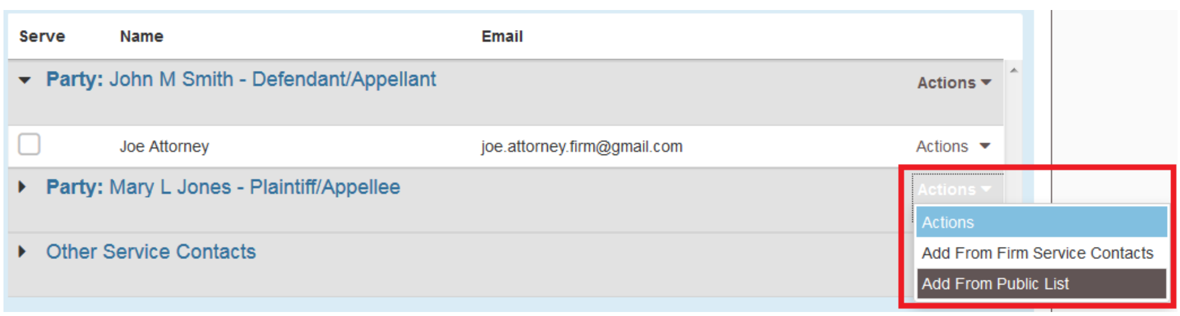

Filings
Filing Code
Reference Number
Filing Description
Motion of Appellant to extend dat...
Client #0246
Smith Motion to Extend Brief Due ...
Actions
Appellant Brief
Client #0246
Smith Brief
Actions
Add Another Filing
Enter the details for this filing
Filing Type
EFileAndServe
Filing Code
Appellant Brief
Filing Description
Smith Brief
Reference Number
Client #0246
Filing Comments
Optional: Any comments for court clerks
Courtesy Copies
jane.p.attorney@gmail.com
Related Parties
John M Smith
Lead Document (Required)
Appellants_Brief.pdf 6.05 MB
Description
Optional
Undo
Save Changes

6. When you have completed the Filings section of your envelope and saved changes for all documents to be submitted, continue to the Service Contacts section of the envelope. In this section, you select those parties to be served with the items you are submitting in this envelope.

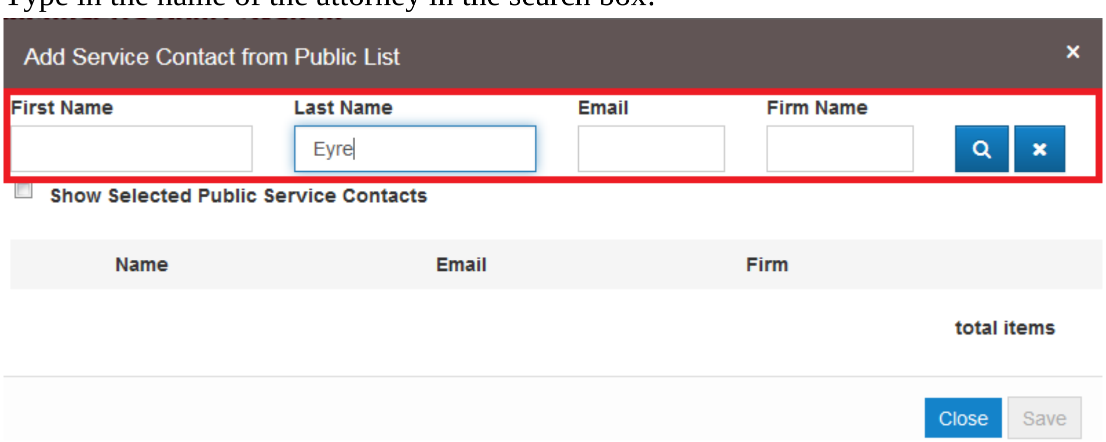


If the attorney or party you need to serve is not already an associated service contact listed on the case, search for them on the public list. All attorneys who register to e-file must add themselves to the "public list" of potential service contacts

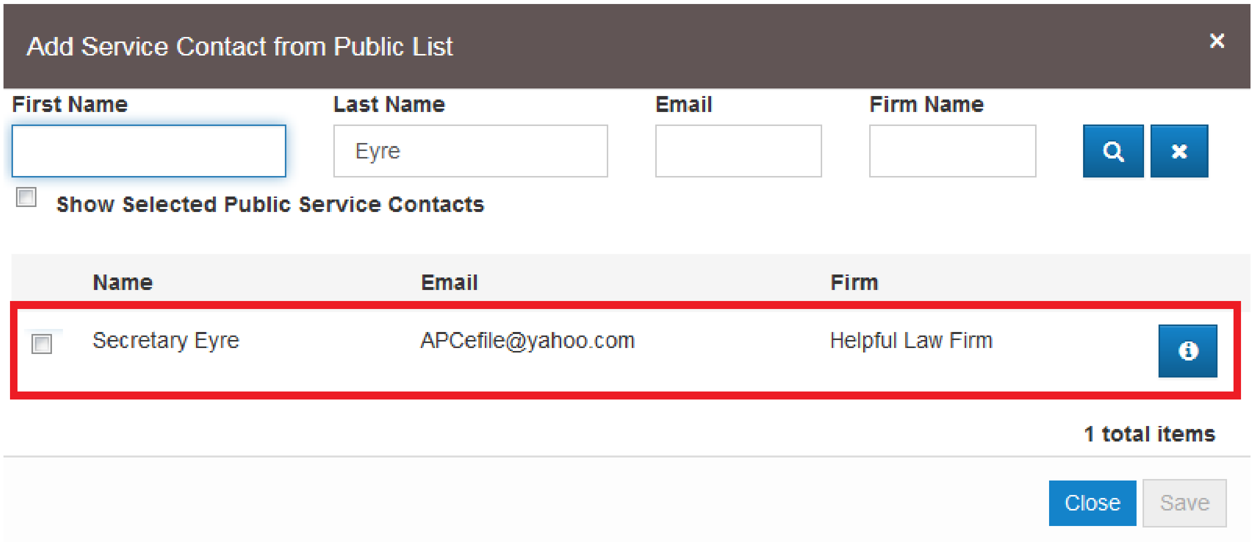
Click the "Actions" dropdown to the right of the party who needs service and select "Add from Public List":



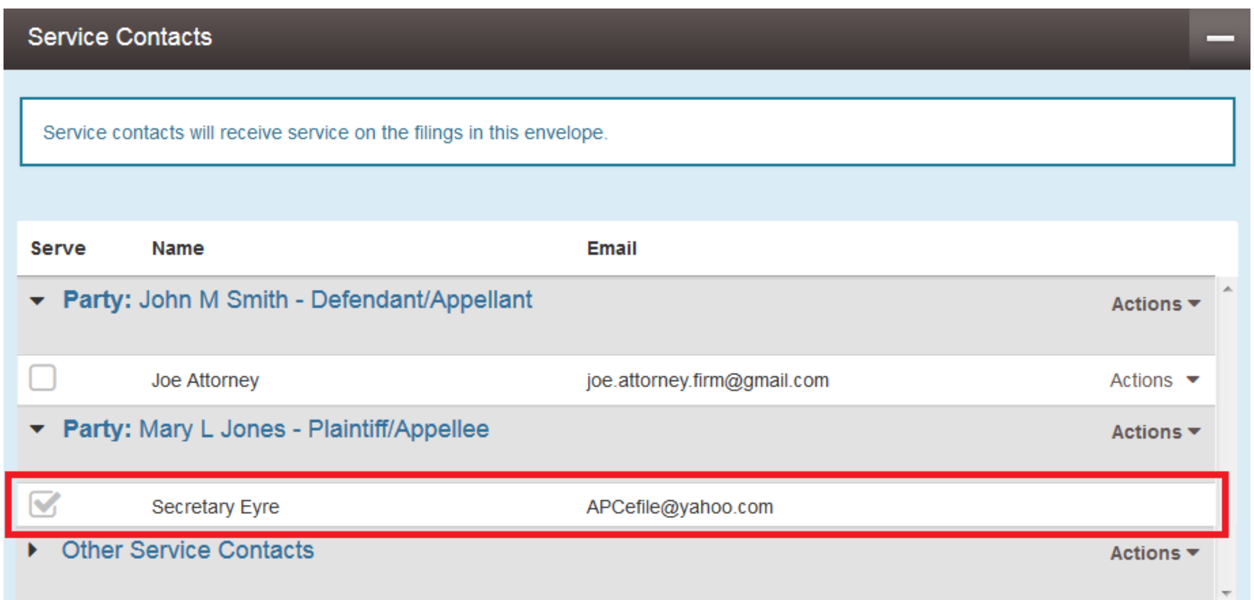
Type in the name of the attorney in the search box:



Check the box next to the contact you wish to add, and click the "Save" button.



Under the appropriate party, ensure that the check box next to the service contact is checked:



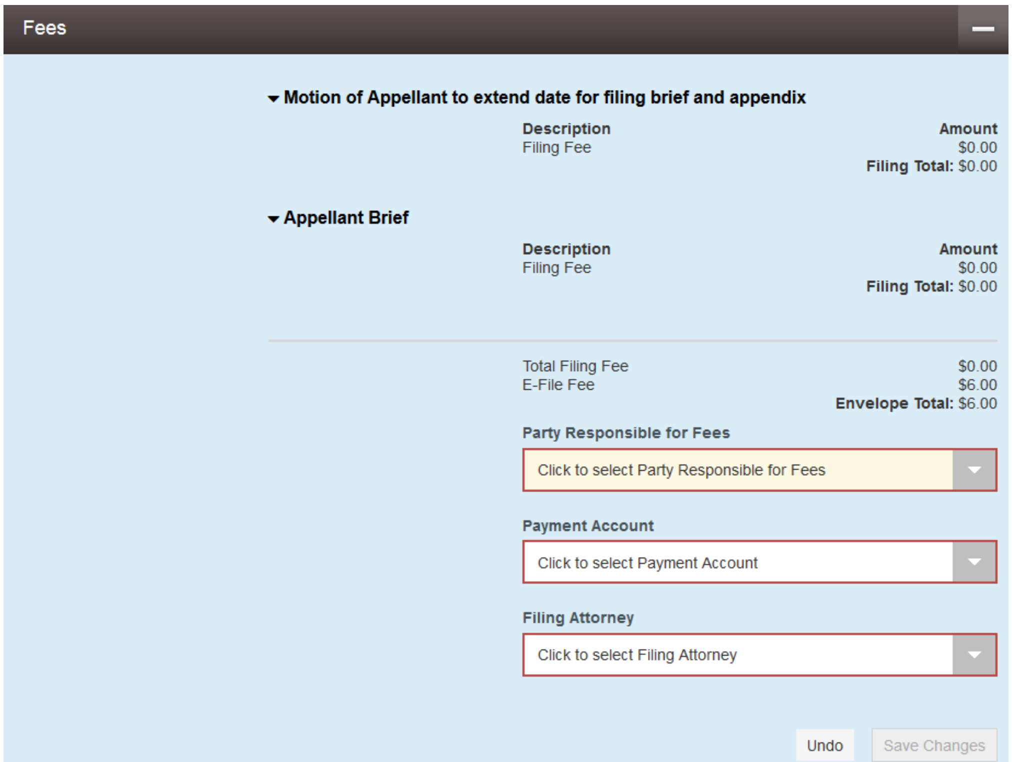
Once you have selected a service contact for all parties that have a representative registered for e-service, move on to the fees section of the envelope.

7. In the fees section, fill out all required fields:

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.

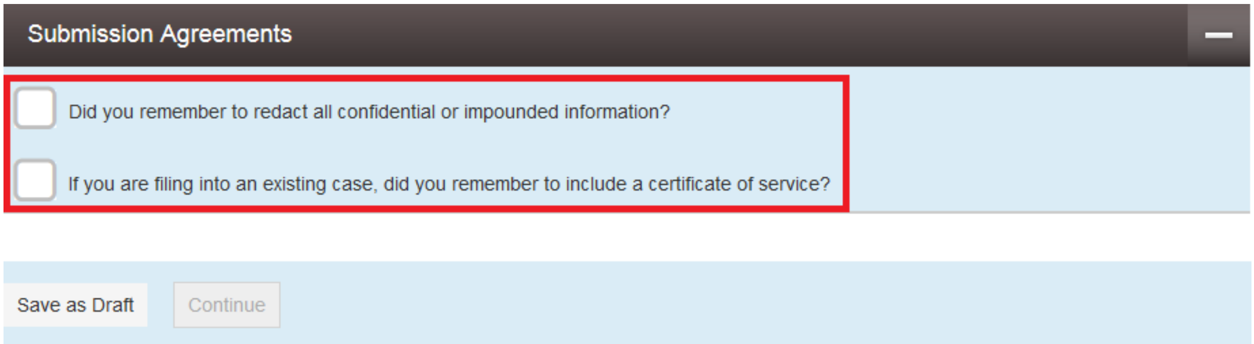
Payment Account: This dropdown lists all Payment Accounts associated with your firm (see separate guide on how to add payment accounts to your firm). Select the method of payment for the filing fees associated with this filing. Do not use a waiver account unless waiver of court fees has already been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

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



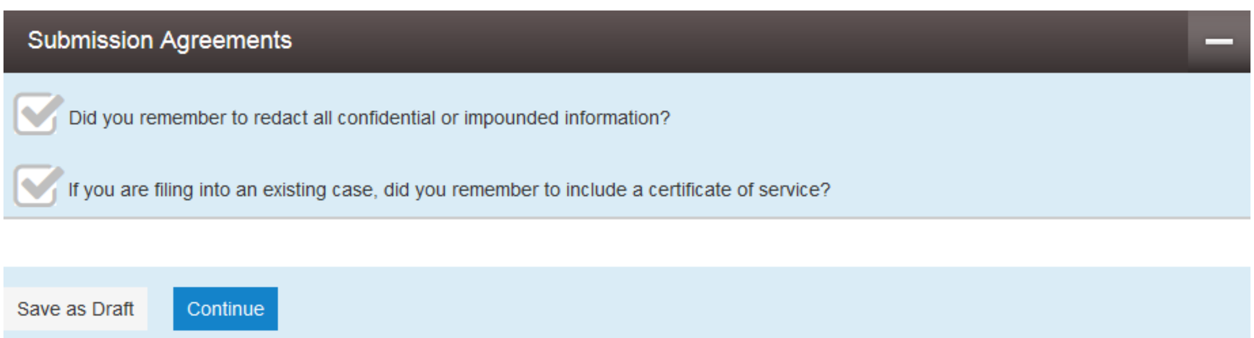
Once all of the information is filled in completely, click the Save Changes button:

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



Read both agreements through completely. 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 add a certificate of service to your uploaded document.

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



10. Review the envelope on the next page, ensuring the information is complete and correct:

Case # 2016-P-2016 - Mary L Jones v John M Smith

Case Information

Location
Appeals Court

Category
Appeals Court Panel Cases - Civil

Case Type
Contract dispute

Lower Court/Agency #
* Superior Court, Middlesex County

Short Title
Mary L Jones v John M Smith

Case #
2016-P-2016

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
Motion of Appellant to extend date for filing brief and ...	Client #0246	Smith Motion to Extend Brief Due Date
Appellant Brief	Client #0246	Smith Brief

Service Contacts

Serve	Name	Email
Party: John M Smith - Defendant/Appellant		
☐	Joe Attorney	joe.attorney.firm@gmail.com
Party: Mary L Jones - Plaintiff/Appellee		
☑	Secretary Eyre	APCefile@yahoo.com
☐	Elizabeth Jean Harvey	elizabeth.harvey@appct.state.ma.us
Other Service Contacts		

Fees

Motion of Appellant to extend date for filing brief and appendix

Description	Amount
Filing Fee	$0.00
Filing Total:	$0.00

Appellant Brief

Description	Amount
Filing Fee	$0.00
Filing Total:	$0.00

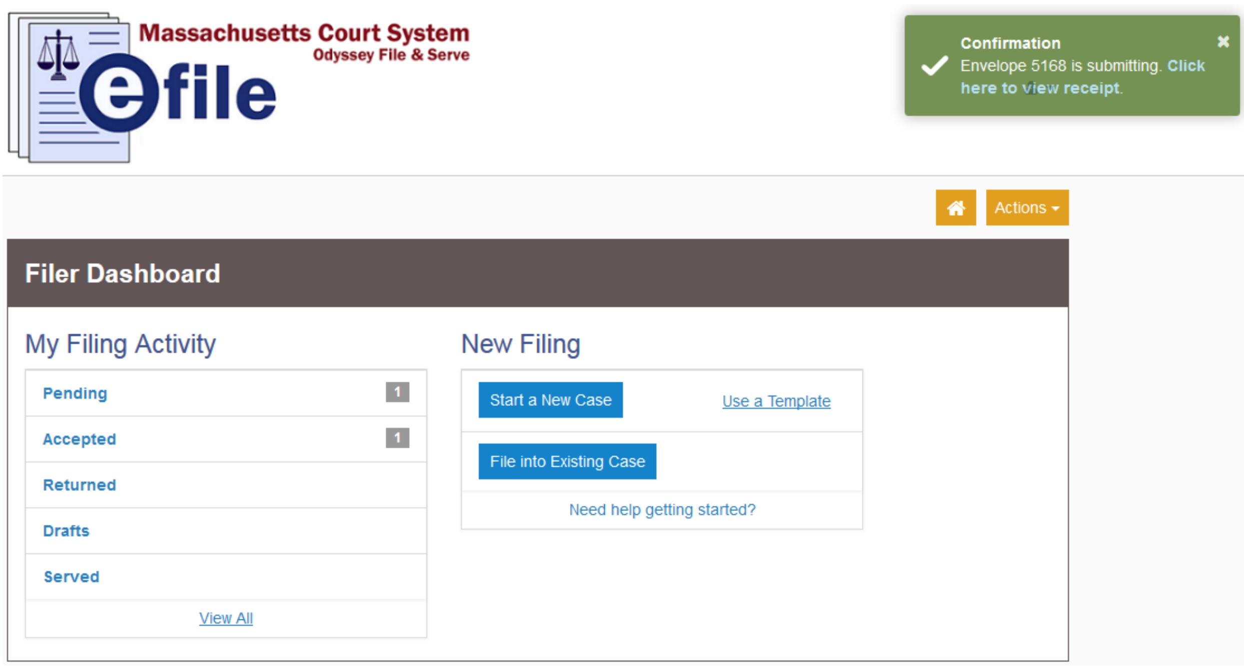
Total Filing Fee	$0.00
Payment Service Fee	$1.00
E-File Fee	$6.00
Envelope Total:	$7.00

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 accepted or rejected for filing.

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

<u>Please do not call the Clerk's Office with technical support related questions.</u>

Case # 2016-P-2016 - Mary L Jones v John M Smith

Envelope Information

Envelope Id
5168

Submitted Date
3/7/2016 11:44 AM EST

Submitted User Name
joe.attorney.firm@gmail.com

Case Information

Location
Appeals Court

Category
Appeals Court Panel Cases - Civil

Case Type
Contract dispute

Lower Court/Agency #
* Superior Court, Middlesex County

Short Title
Mary L Jones v John M Smith

Case #
2016-P-2016

Firm Name
Joe Attorney's Law Firm

Filed By
Joe Attorney

Filings

Filing Type
EFileAndServe

Filing Code
Motion of Appellant to extend date for filing brief and appendix

Filing Description
Smith Motion to Extend Brief Due Date

Reference Number
Client #0246

Courtesy Copies
jane.p.attorney@gmail.com

Related Parties
John M Smith

Filing Status
Submitted

Lead Document

File Name	Description	Security	Download
Motion_to_Extend_Brief_Due_Date.pdf			Original File

eService Details

Status	Name	Firm	Served	Date Opened
Sent	Secretary Eyre	Helpful Law Firm	Yes	Not Opened

Filing Type
EFileAndServe

Filing Code
Appellant Brief

Filing Description
Smith Brief

Reference Number
Client #0246

Courtesy Copies
jane.p.attorney@gmail.com

Related Parties
John M Smith

Filing Status
Submitted

Lead Document

File Name	Description	Security	Download
Appellants_Brief.pdf			Original File

eService Details

Status	Name	Firm	Served	Date Opened
Sent	Secretary Eyre	Helpful Law Firm	Yes	Not Opened

Fees

Motion of Appellant to extend date for filing brief and appendix

Description	Amount
Filing Fee	$0.00
	Filing Total: $0.00

Appellant Brief

Description	Amount
Filing Fee	$0.00
	Filing Total: $0.00

Total Filing Fee	$0.00
Payment Service Fee	$1.00
E-File Fee	$6.00
	Envelope Total: $7.00

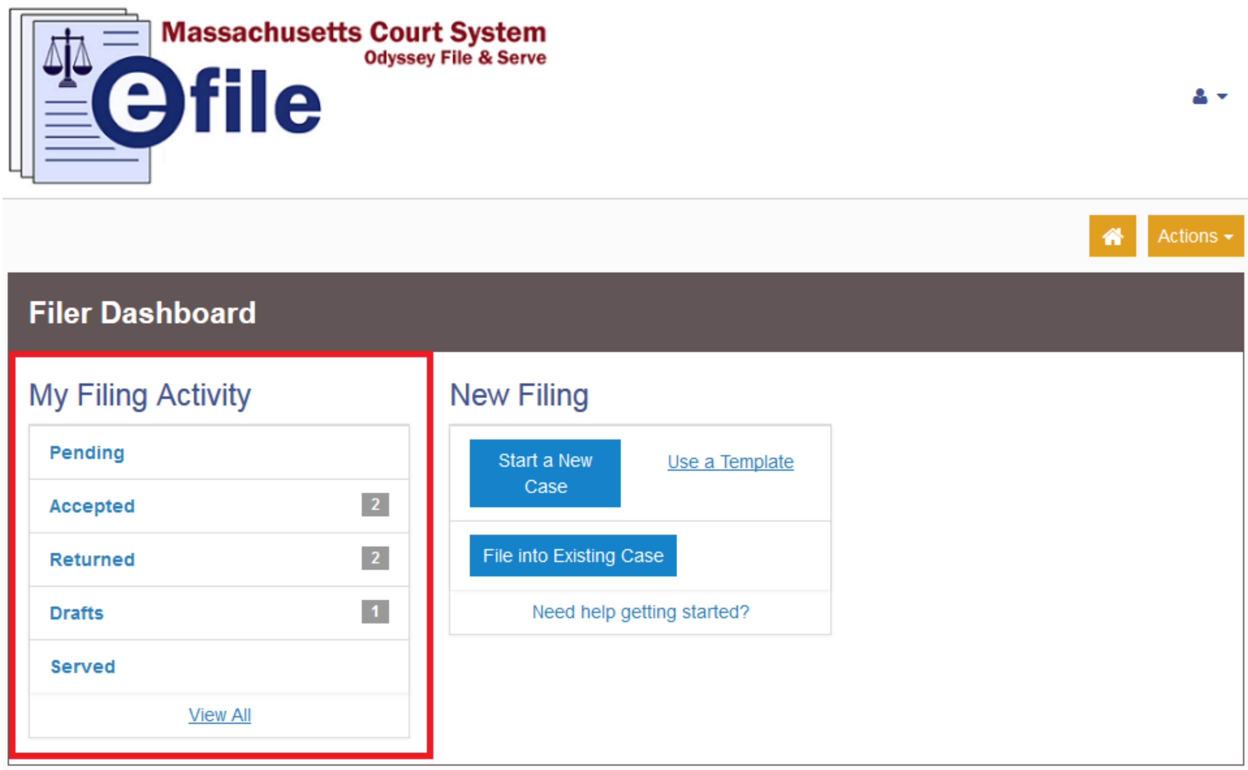
Party Responsible for Fees	John M Smith	**Transaction Amount**	$7.00
Payment Account	Master Card	**Transaction Id**	3507
Filing Attorney	Tiffany Knapp	**Order Id**	000005168-0
Transaction Response	Authorized		

CHECK STATUS OF E-FILED DOCUMENTS

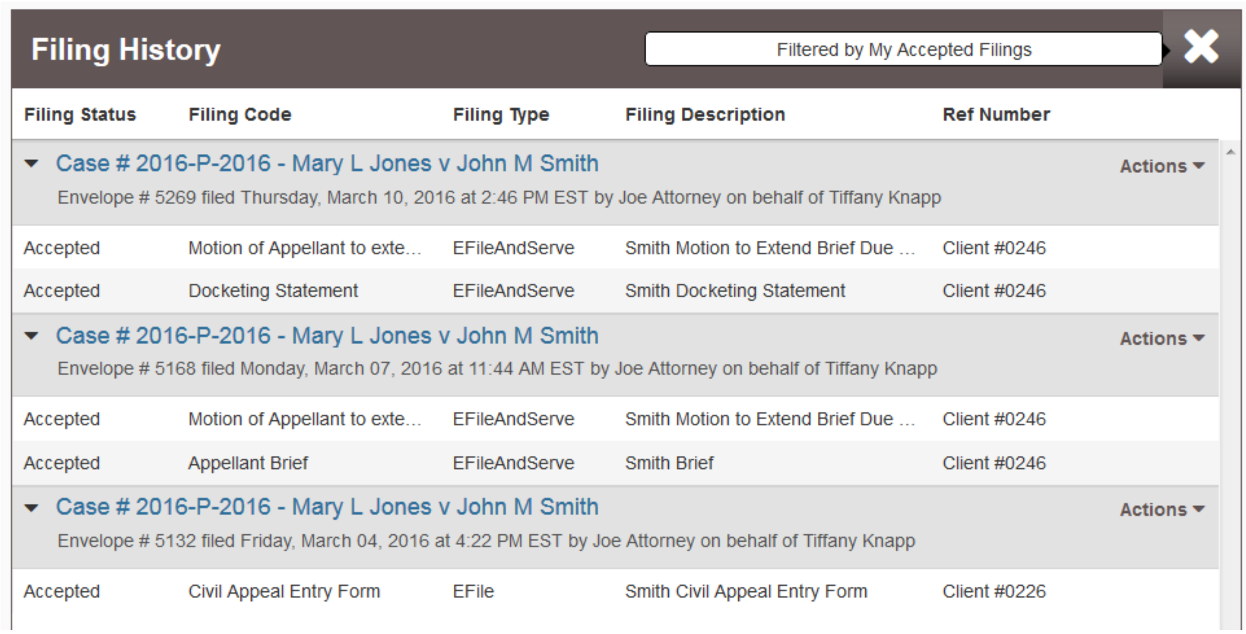
To determine whether an e-filed document has been accepted, rejected, or is still pending review at the Court, follow these steps.

Note: you should receive emails that update you on the status of e-filed documents as well. Please be sure to check your email. If the emails are not appearing, check your spam folder. If you cannot locate the emails, contact Tyler support at 1.800.297.5377.

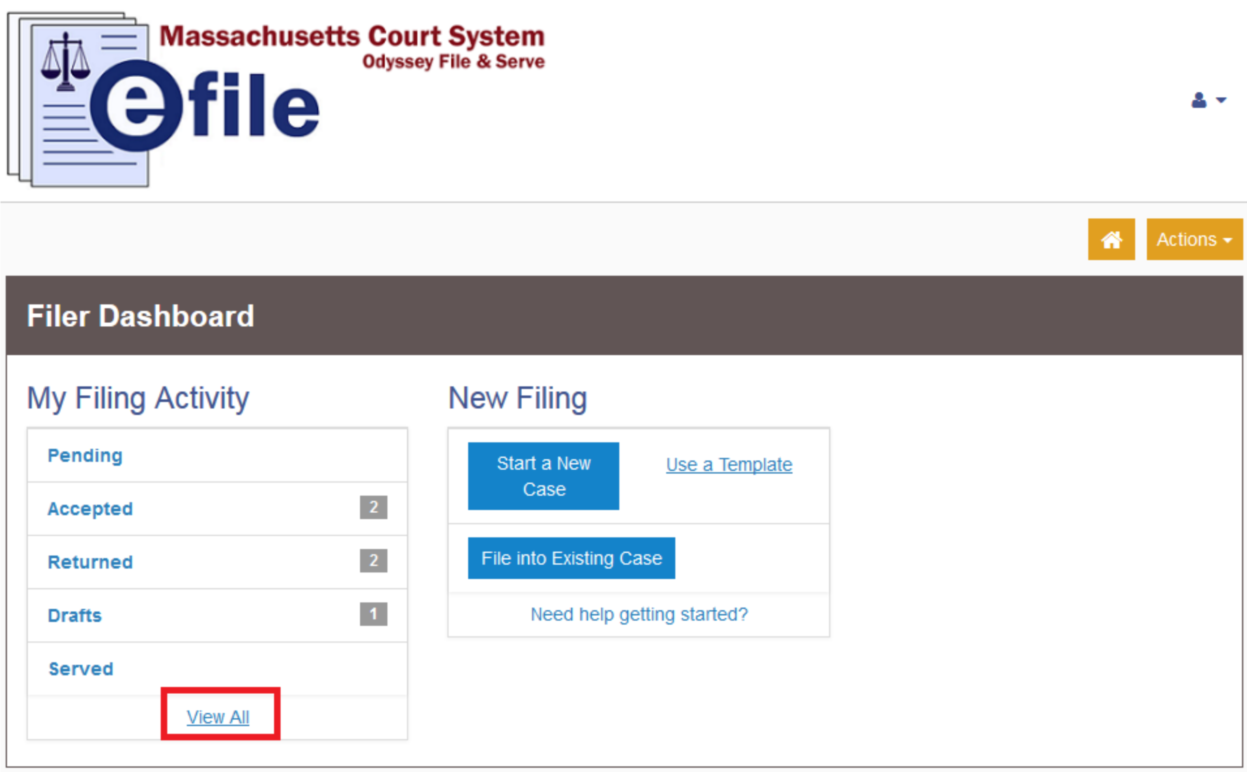
1. Check the "My Filing Activity" section of the home screen. A number will appear beside each heading. This number represents the number of filings relevant to that heading since you last checked (e.g., the number of documents you have pending before the court as of the last time you checked what documents are pending).



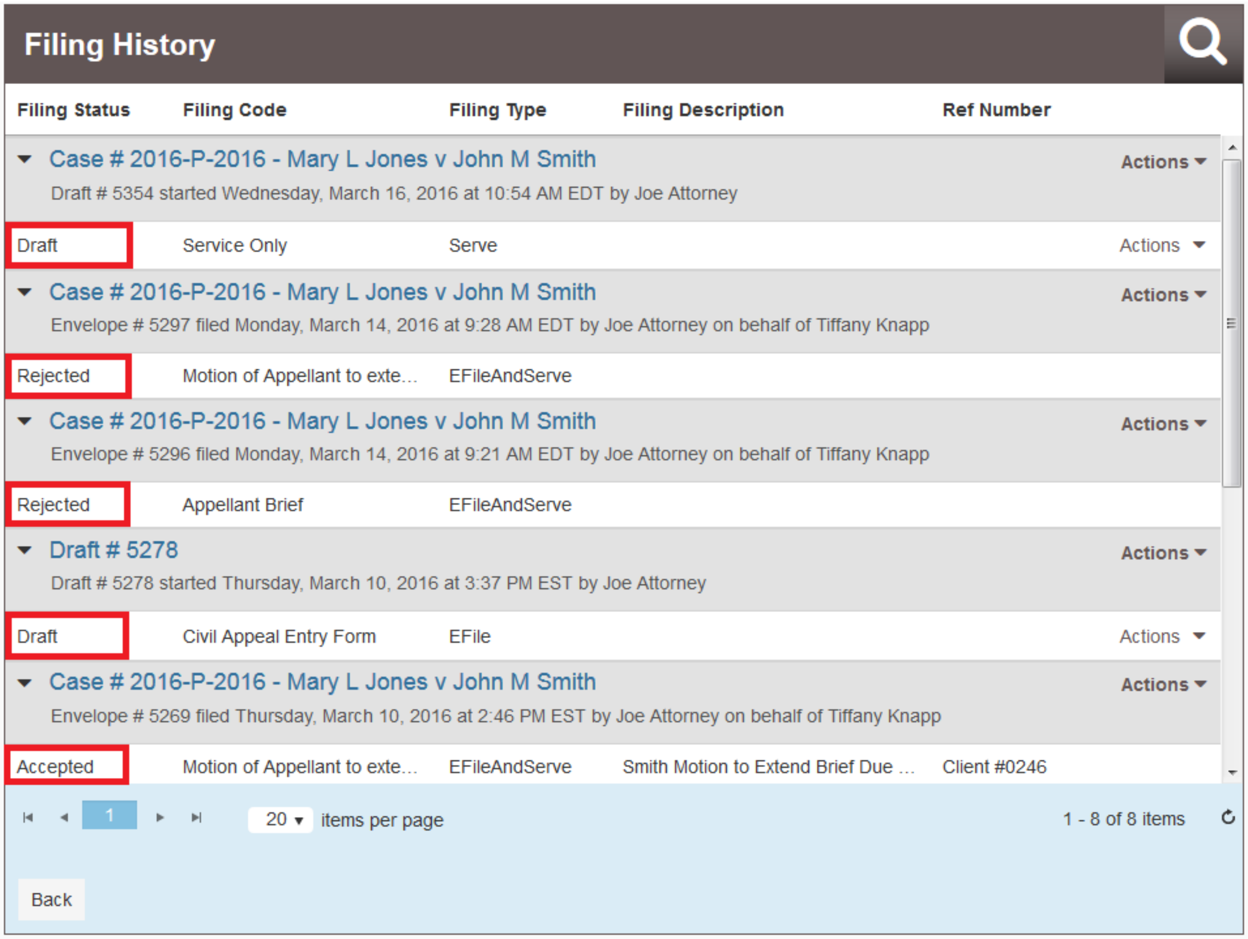
2. Clicking any of these headings will allow you to look for a given filing to determine its status. Click the "Accepted" header will display a list of documents that have been accepted by the court, and so on:



3. To see all of your filings and the filing status of each, click the "View All" button at the bottom of the My Filing Activity section:



4. You will be able to review all of your filings. The status appears on the left below the details of each filing:



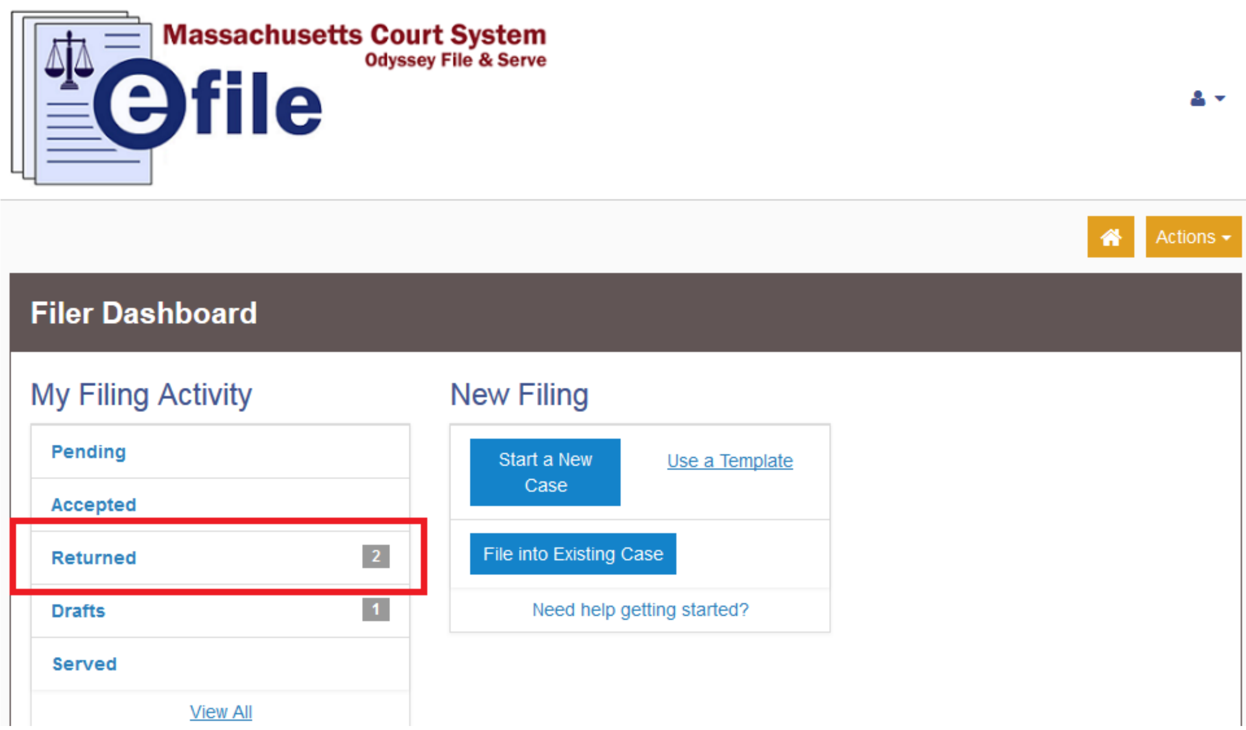
Should you encounter any problems checking on the status of an e-filing and you are sure you have followed the previous steps correctly, please call Tyler Support at 1.800.297.5377

<u>Please do not call the Clerk's Office with technical support related questions.</u>

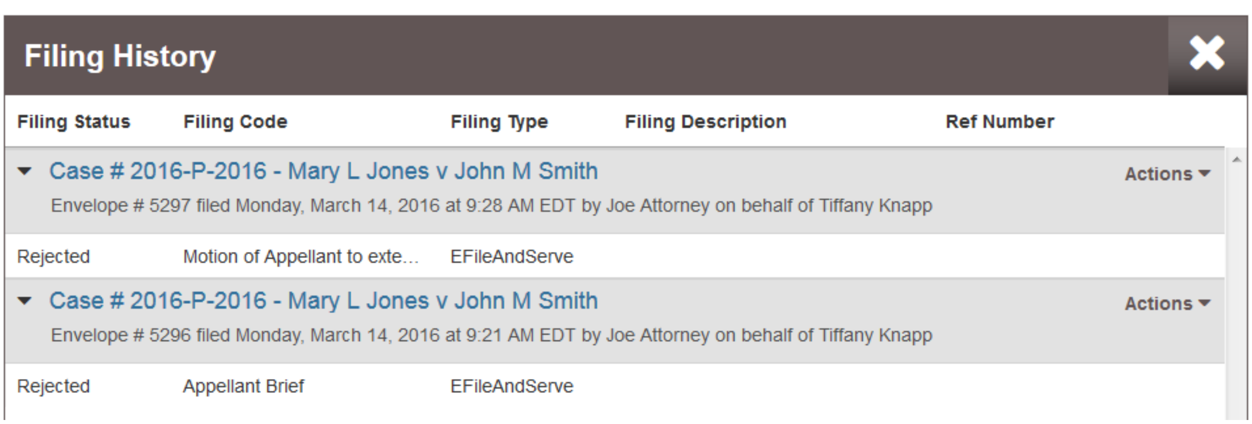
RESUBMITTING A REJECTED FILING

If a filing is rejected, you can resubmit the filing using this process instead of creating an entire new submission envelope from scratch. Using this process also alerts the Clerk's Office that the filing is a resubmission. At the clerk's discretion, filings can be back-dated to their original submission date when the first filing is rejected and a later, conforming filing is submitted in its place.

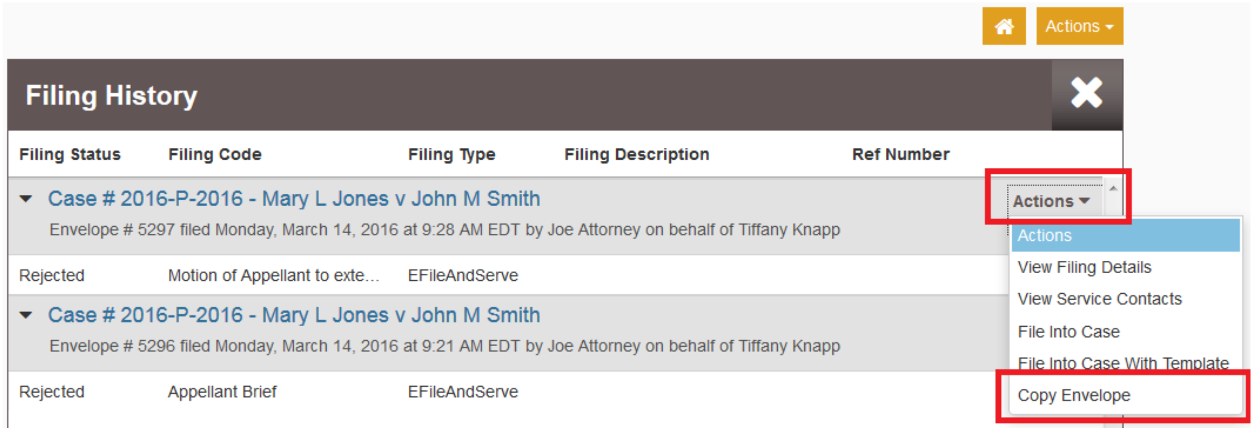
1. On the home screen, a number will appear next to the "Returned" tab indicating how many documents have been returned to you by the court for correction *since the last time you clicked on that tab*. It is important to note that this number resets to zero once you look at the returned filings, regardless of whether or not you have corrected the envelope. It is incumbent upon the filer to keep track of filings that need to be resubmitted.



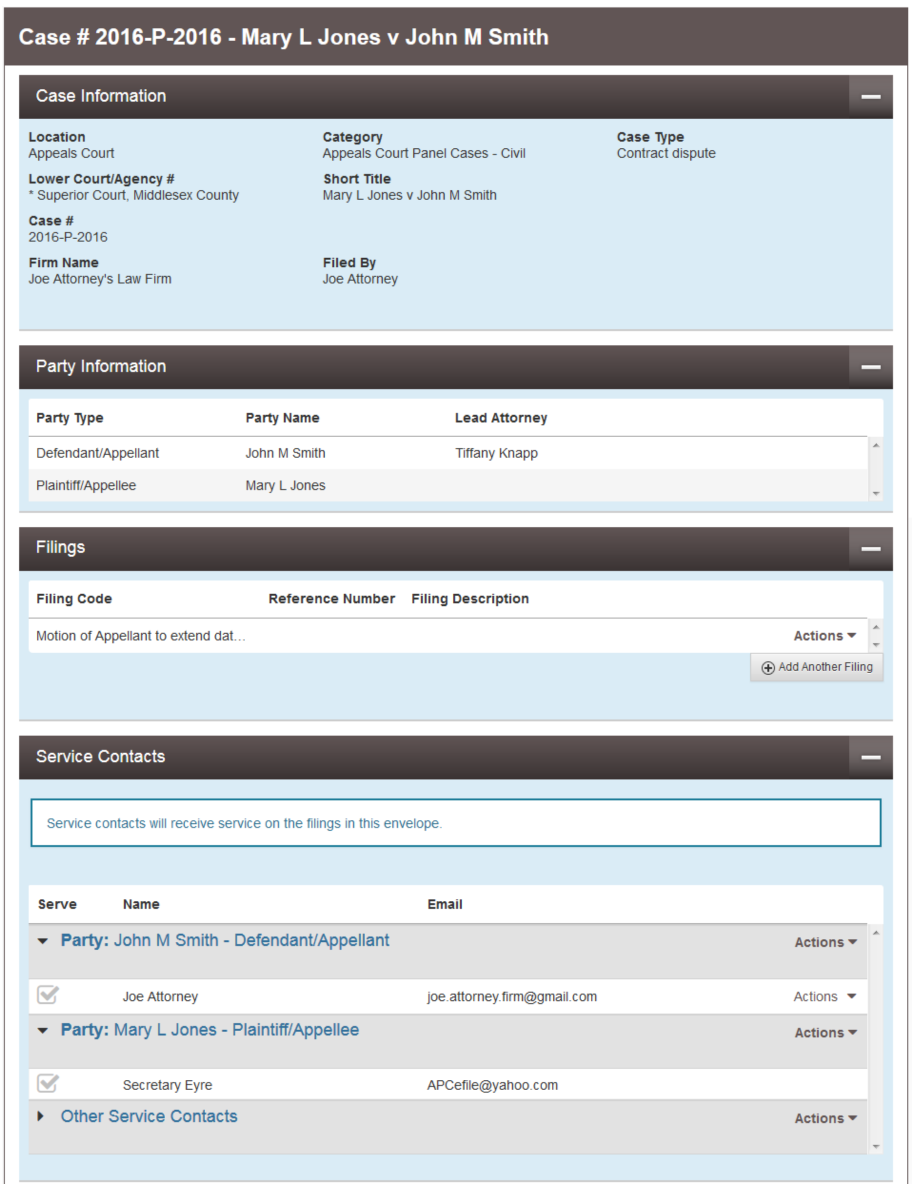
Click on the returned tab to see a list of filings that have been returned for correction by the court.



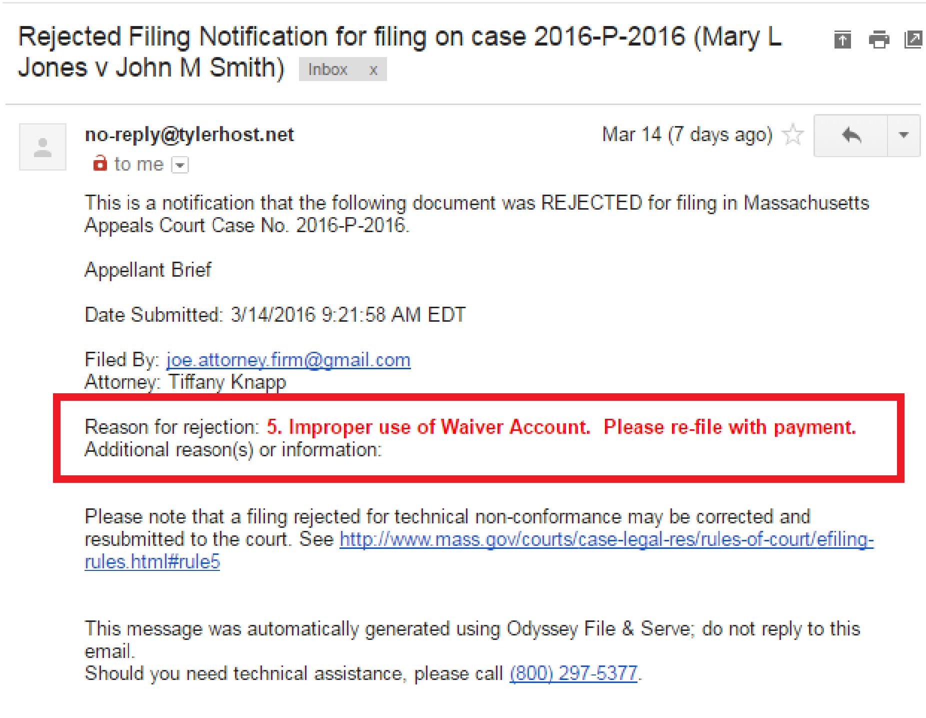
2. Click the "Actions" button beside the envelope you wish to correct. In the dropdown menu, select "Copy Envelope."



This creates a replica of the envelope that was previously submitted and is need of correction:



3. Refer to the rejection email from Tyler and/or the eNotice or paper notice from the Appeals Court regarding the reasons for the rejection of your envelope:


Rejected Filing Notification for filing on case 2016-P-2016 (Mary L Jones v John M Smith) Inbox x

no-reply@tylerhost.net
to me
Mar 14 (7 days ago)

This is a notification that the following document was REJECTED for filing in Massachusetts Appeals Court Case No. 2016-P-2016.

Appellant Brief

Date Submitted: 3/14/2016 9:21:58 AM EDT

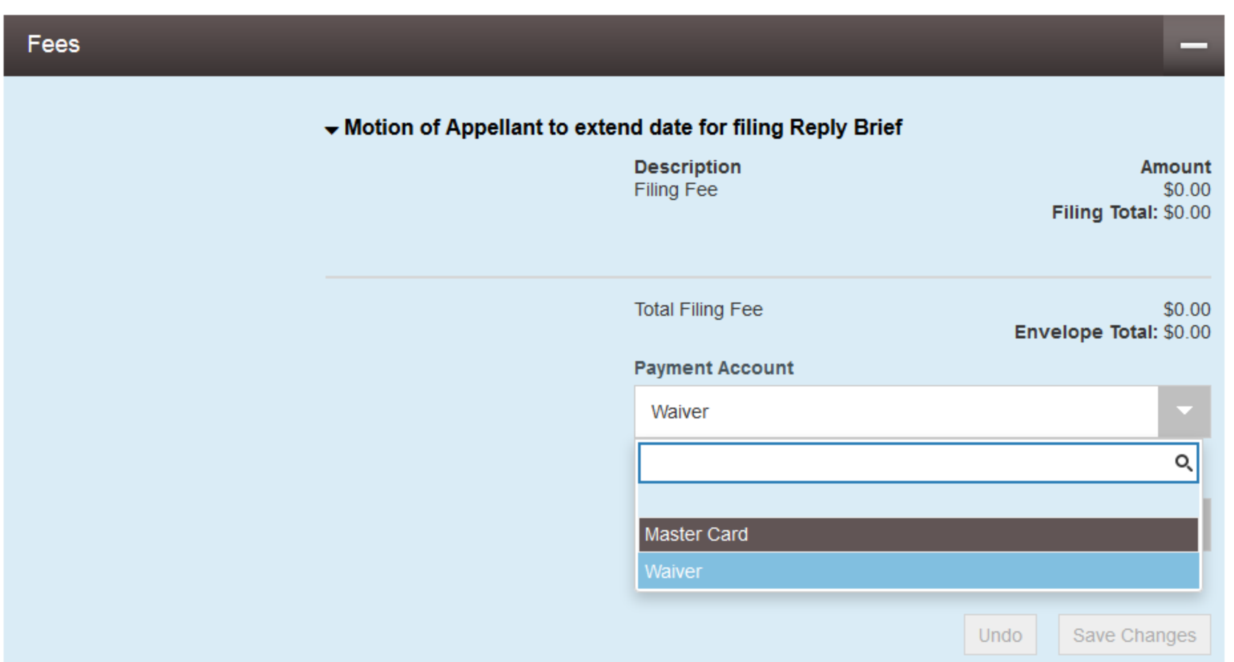
Filed By: joe.attorney.firm@gmail.com
Attorney: Tiffany Knapp

Reason for rejection: **5. Improper use of Waiver Account. Please re-file with payment.**
Additional reason(s) or information:

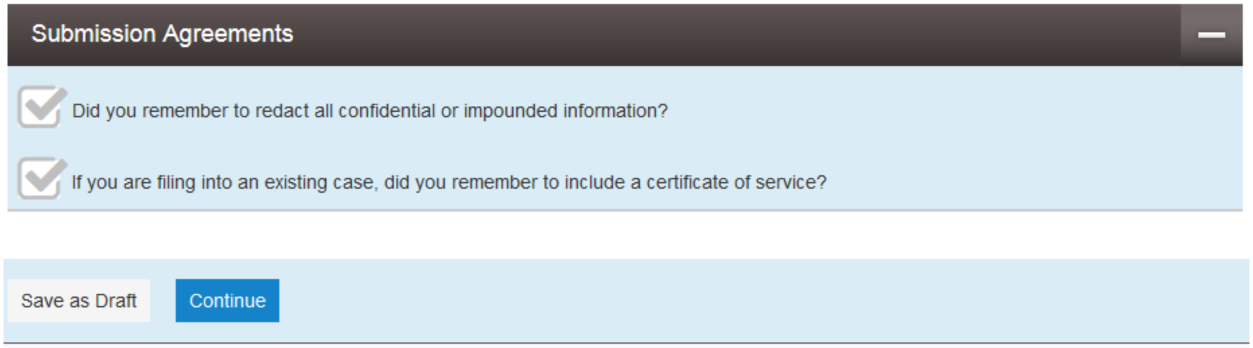
Please note that a filing rejected for technical non-conformance may be corrected and resubmitted to the court. See http://www.mass.gov/courts/case-legal-res/rules-of-court/efiling-rules.html#rule5

This message was automatically generated using Odyssey File & Serve; do not reply to this email.
Should you need technical assistance, please call (800) 297-5377.

4. Correct the issue in the duplicate envelope (note: your issue may not be related to the payment account):

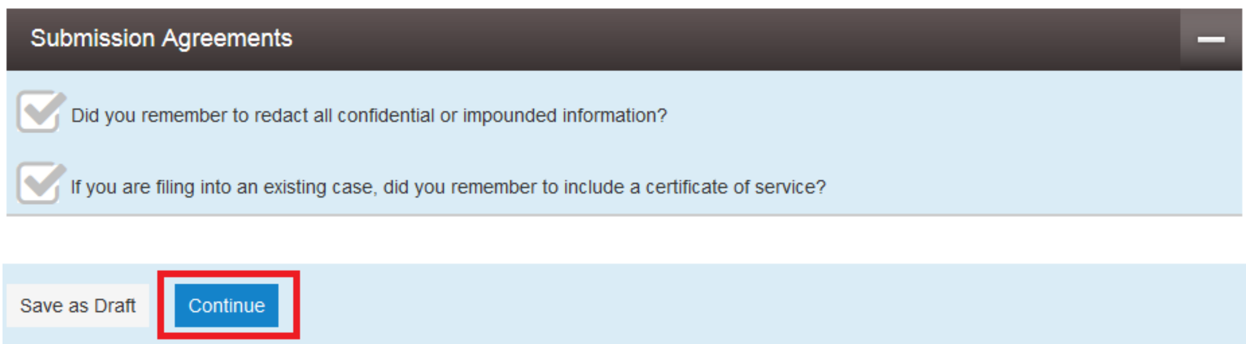


5. Once you have corrected the issue, complete the Submission Agreements section as you would with any other envelope:

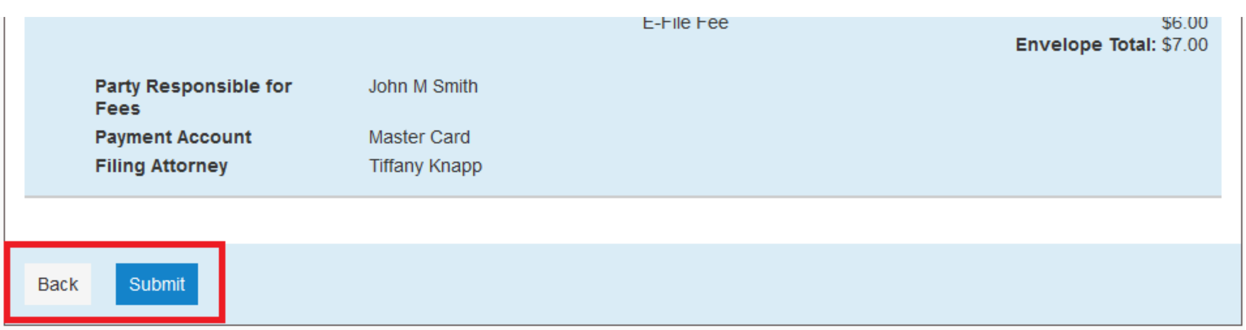


Read both agreements through completely. If the answer to the question is yes, check the box beside the agreement statement. If the answer is no, either restart the process with a redacted document or add a certificate of service to your uploaded document.
<u>Note</u>: Certificates of service are not required for case initiation. In the event this is a case initiating document, just check the box.

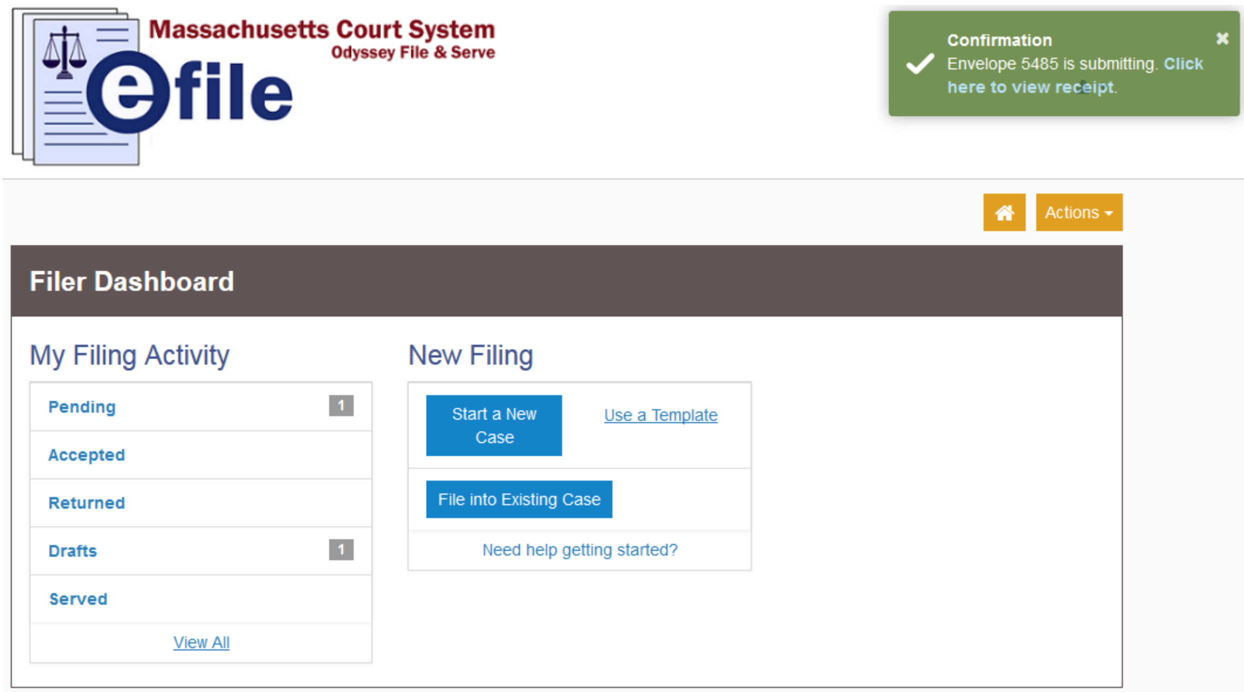
6. Click "Continue"



7. Review your filing on the next page. Ensure you corrected the issues outlined in your rejection email/notice. If a correction needs to be made, click the "Back" button on the bottom of the page. If you are sure the envelope is finished, click the blue "Submit" button.



8. You will see a green notification that your envelope is submitting in the top right of the screen. You will receive an email confirmation of your submission within a few minutes. Once the submission has been reviewed in the Clerk's Office, you will receive an email notice of acceptance or rejection of your submissions.



Should you encounter any problems resubmitting an envelope and you are sure you have followed the previous steps correctly, please call Tyler Support at 1.800.297.5377

<u>Please do not call the Clerk's Office with technical support related questions.</u>

BATES NUMBERING PDFS USING ADOBE

If you have Adobe 8 Pro or newer, you can Bates number your appendix or addenda when they are in PDF form using Adobe Pro rather than manually numbering the pages.

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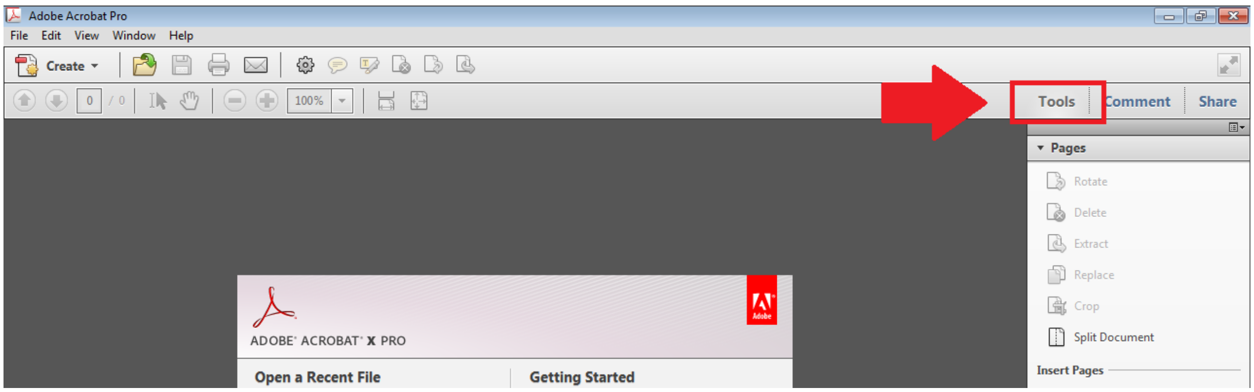
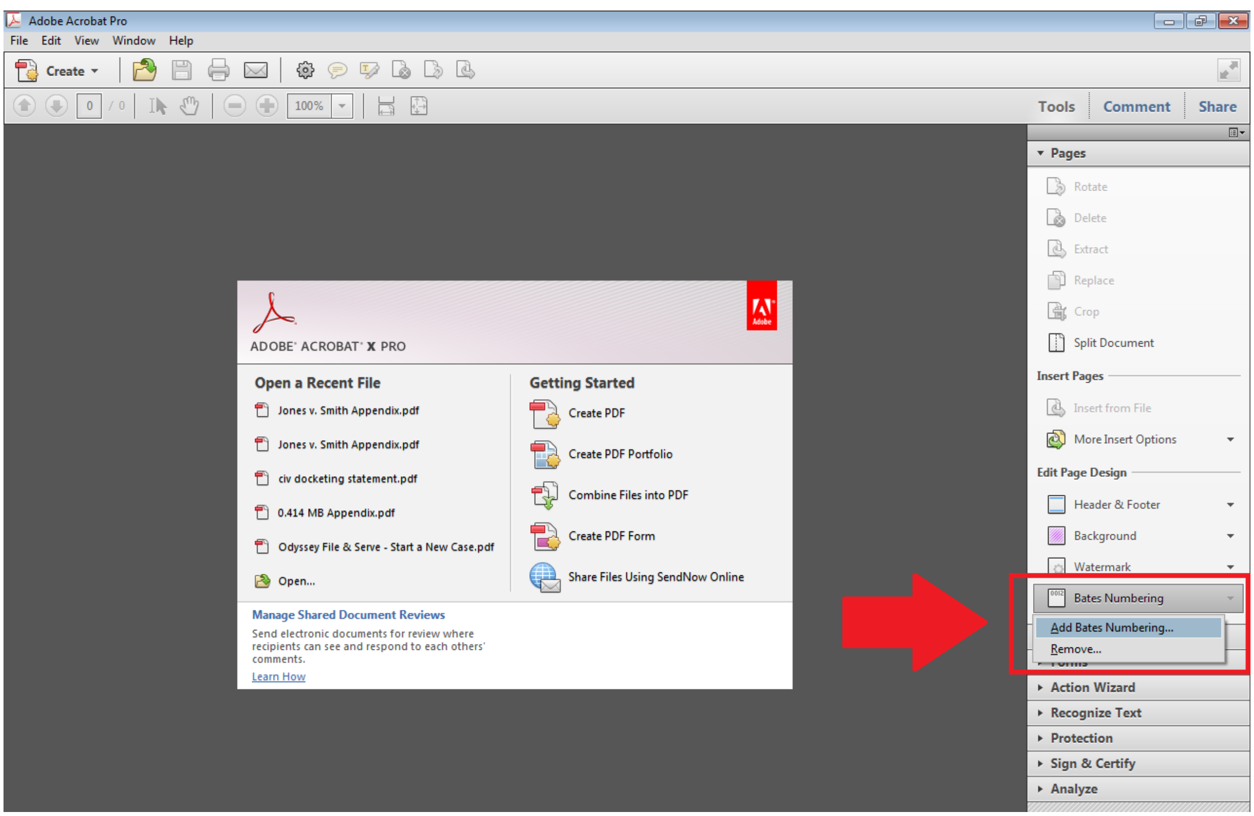
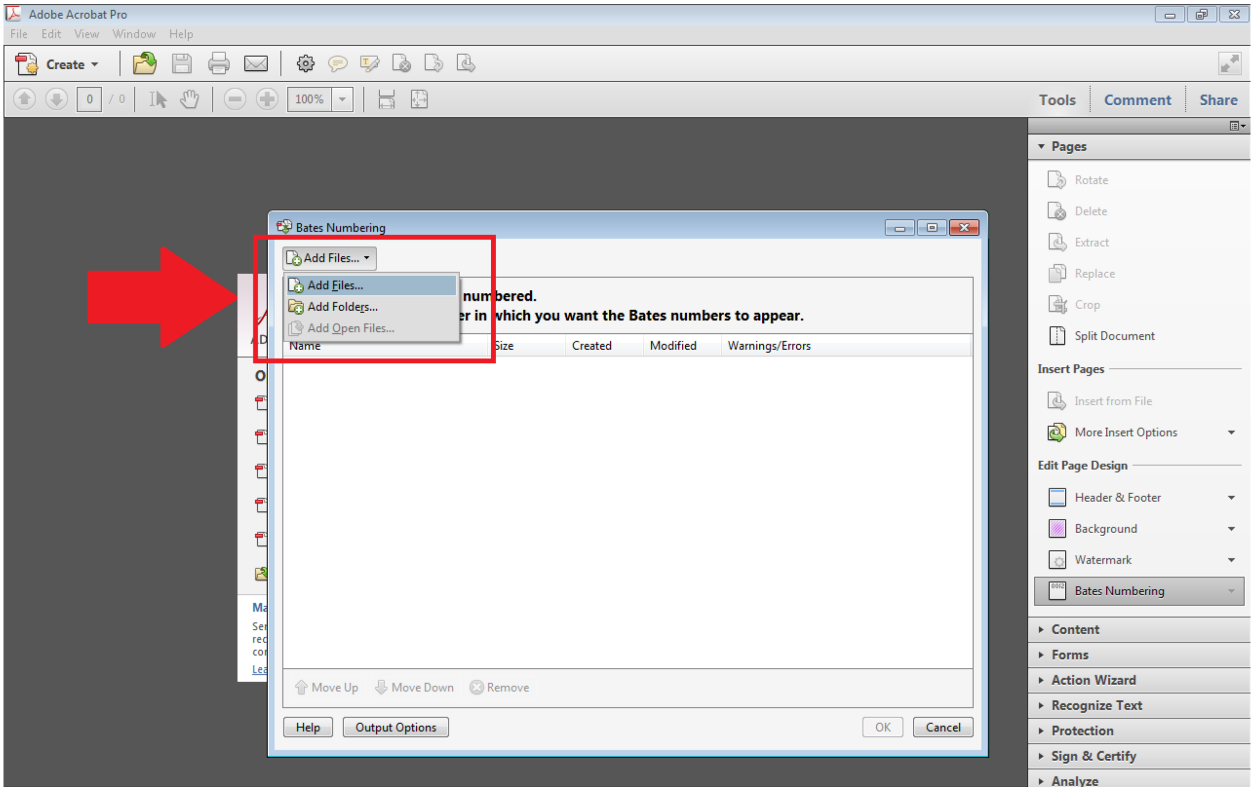
1. Click the "Tools" button:



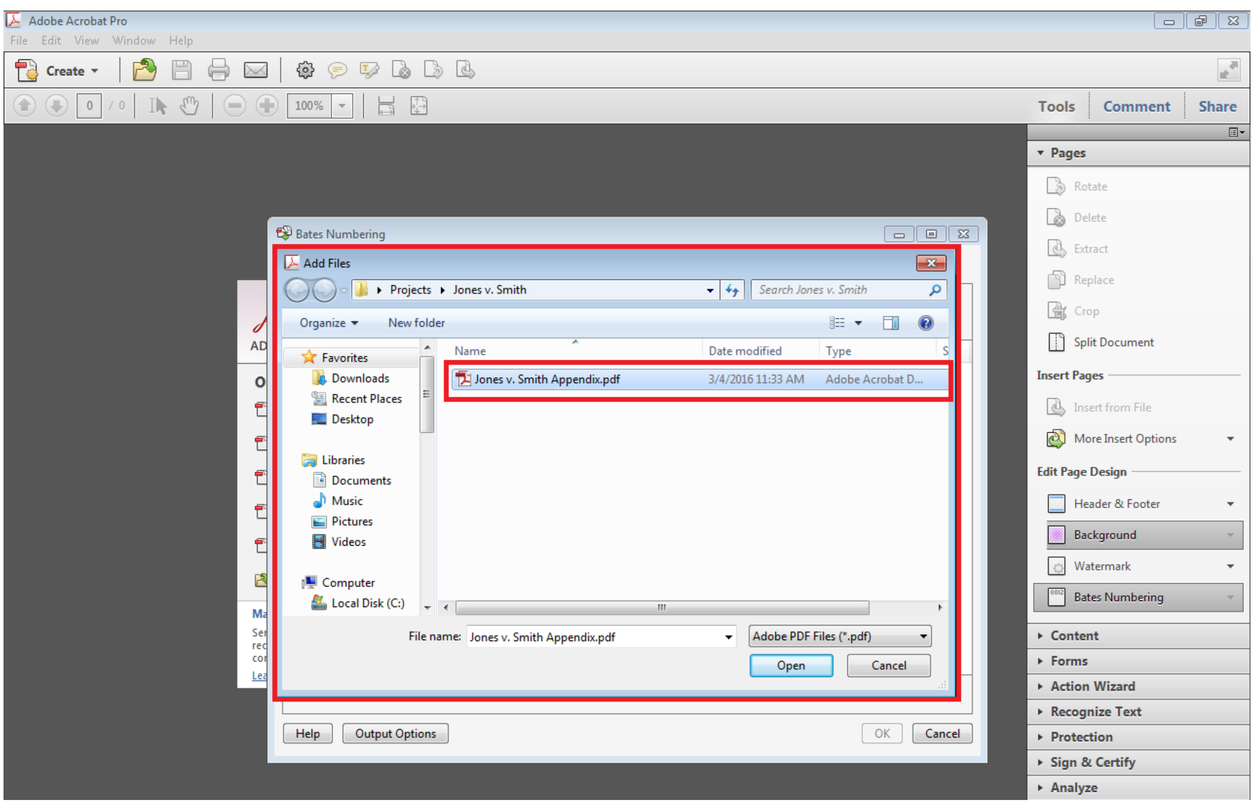
2. Select "Bates Numbering" from the menu on the right hand side of the screen. Click on "Add Bates Numbering" from the dropdown menu:



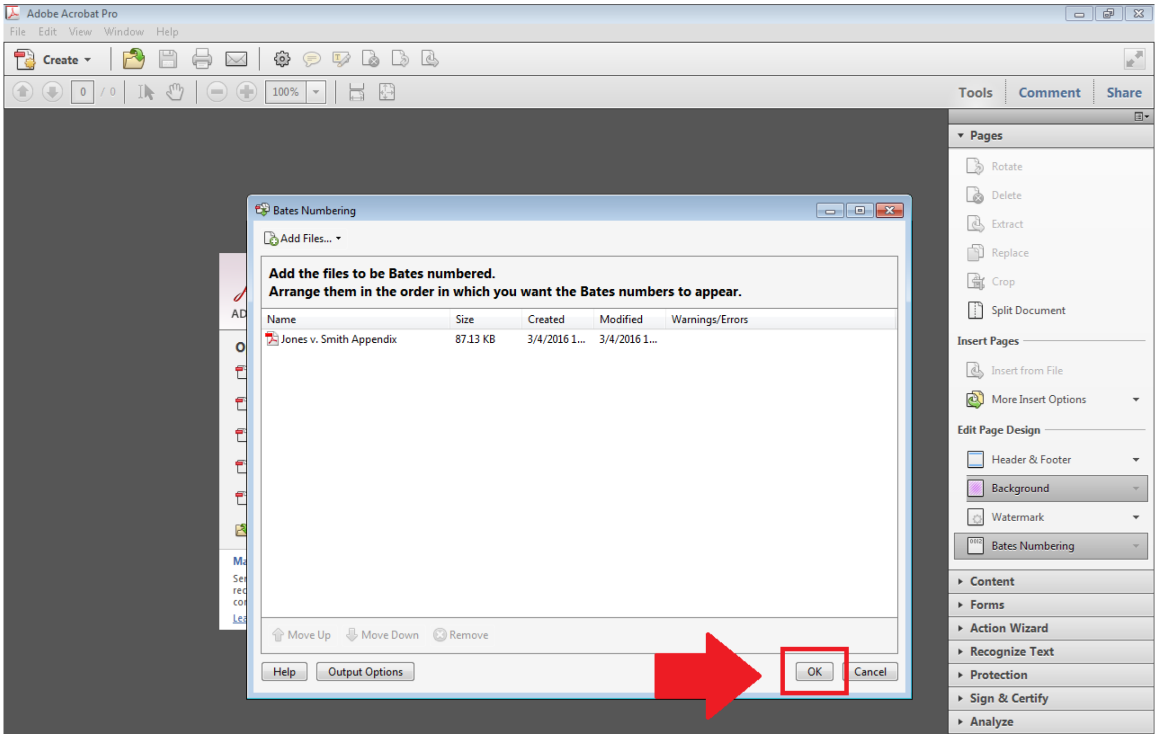
3. In the Bates Numbering popup screen, click the "Add Files..." button and select "Add Files":



4. Navigate to the PDF file that you need to number. Double click it to open:

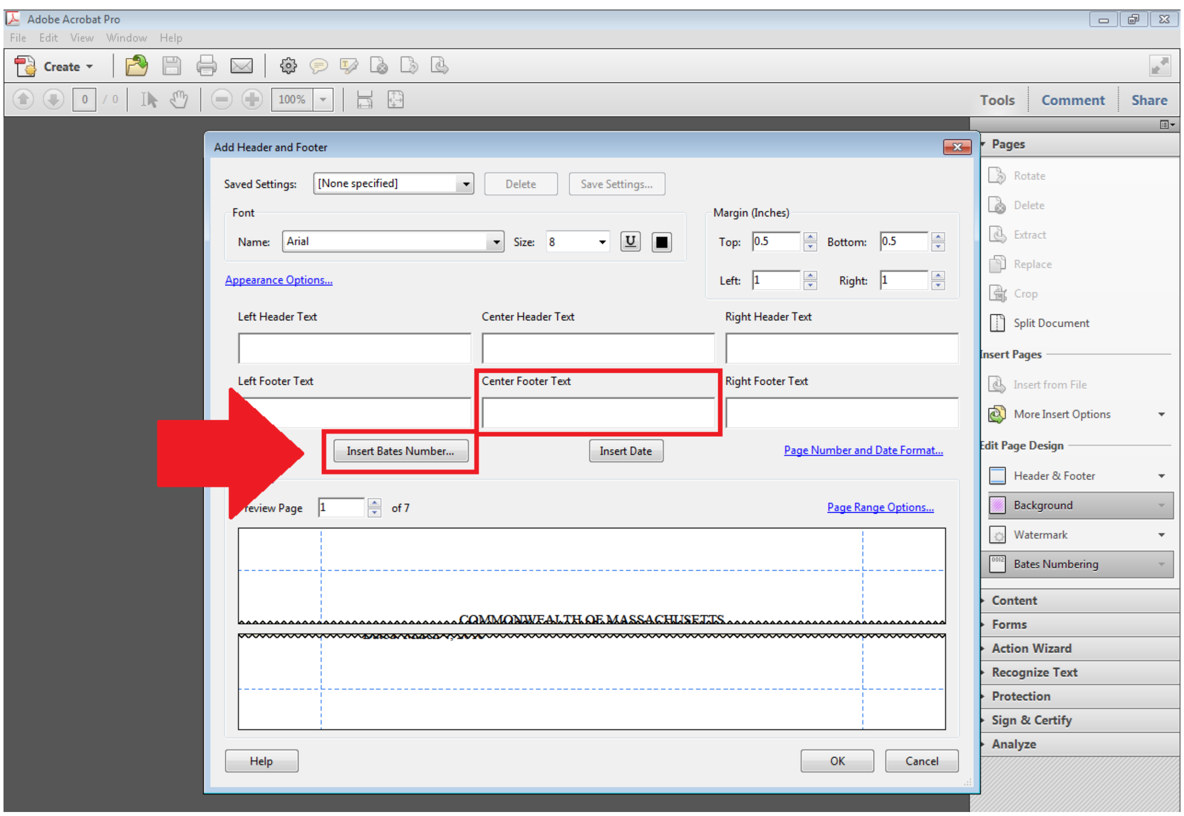


5. Hit "OK":

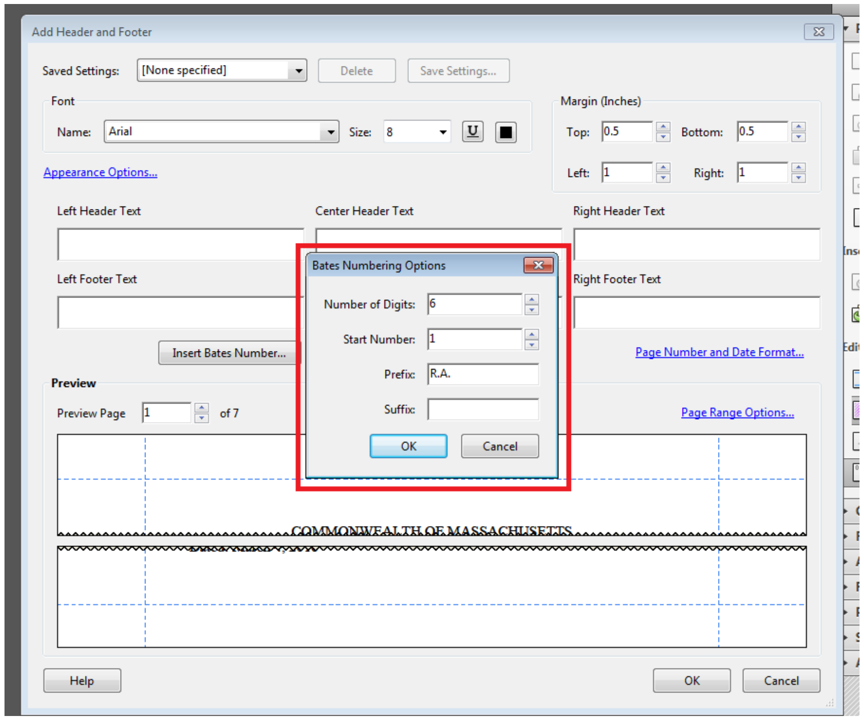


NOTE: **You should only number one PDF file (one appendix volume) at a time. Numbering in multi-volume appendices should *not* span multiple appendix volumes; instead, each volume should begin with page 1.**

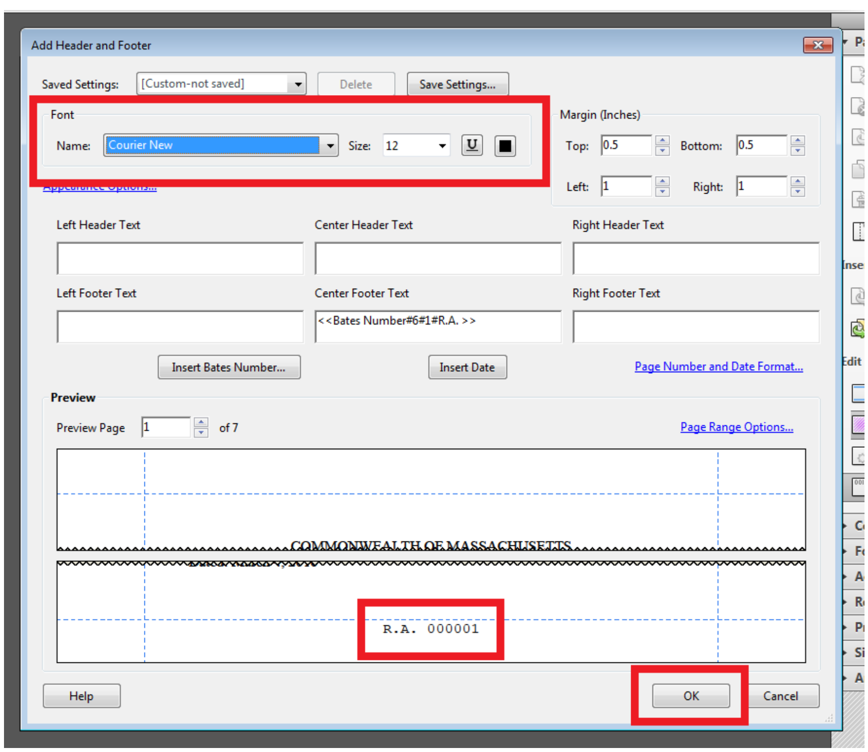
6. In the Add Header and Footer popup screen, click into the white space where you would like the Bates numbering to appear (e.g., Center Footer Text), and then click "Insert Bates Number":



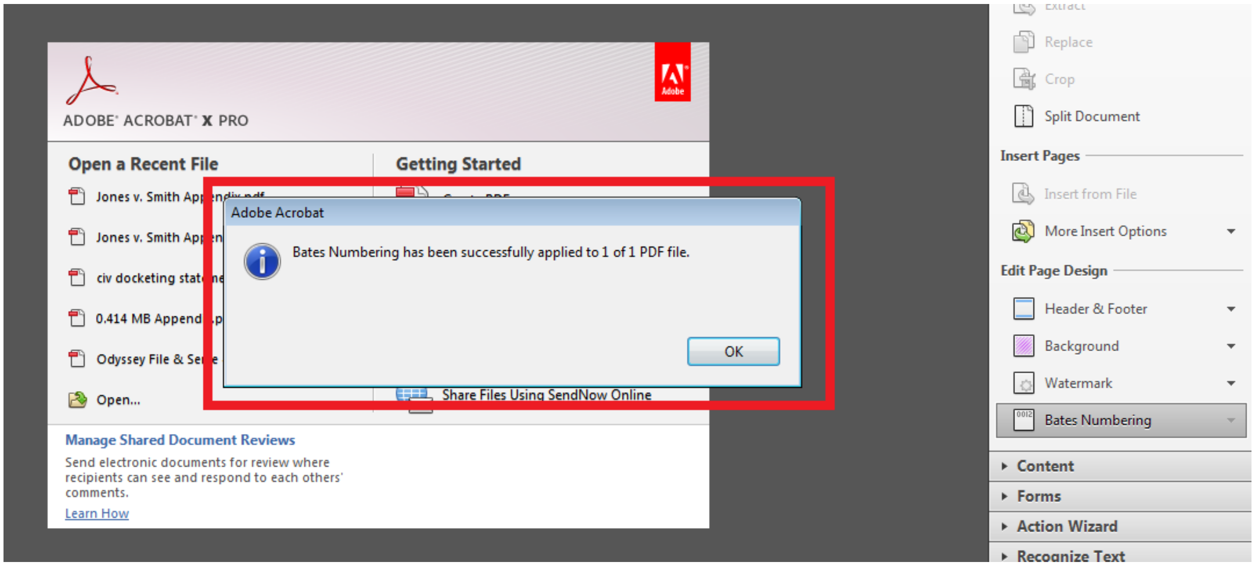
7. In the Bates Numbering Options, select the amount of digits you want the numbering to contain, what page number the numbering should begin on, and any Prefix or Suffix that is needed (e.g., R.A.). Then click "OK":



8. Change the font type, size, and color as desired. Check at the bottom of the screen in the Preview pane that the numbering is showing up as desired. When you have your settings as you would like them, click "OK":



9. You will receive this notification when applying the bates numbering is completed:



10. Click OK. The process is complete. Open the PDF file to be sure the bates numbering is present.