

MENTAL HEALTH INITIAL FILINGS IN ODYSSEY FILE AND SERVE

It is recommended that you set up templates by filing type to streamline your filing process and insure a consistent format on filings. For more information on setting up templates see Chapter 8 of the [Firm and Criminal Filer User Guide](#), available in the “self help” section on the OFS website. When using a template you will need to fill in the information for each Respondent as well as any other information particular to that case, and attach the correct documents.

Initial Filing MH Cases

1. Select your location
2. Select the category of “Probate of Mental Health” *Note: this is simply a product of the system configuration and does not represent any change in jurisdiction or venue of MH cases, which are still heard in the Family Division.*
3. Select Case Type, then click Save Changes.
4. Fill in the parties. On the template, the Applicant should be the Dept of Mental Health as a Business Entity. In the “Filer ID” field, enter “21785”. *This is the Odyssey ID# for the DMH entity- this will ensure that duplicate entities are not created during the filing process. This can be set on your templates.*
5. For the Respondent information you will need to fill in the name, date of birth, and address with each filing (i.e. not on the template).
6. Add any additional parties/participants such as the physician/psychiatrist by clicking “add another party”.
7. Click Save Changes when all parties are entered.
8. Under filings, when initiating a new case, select *Initial Filing - Confidential* as the code under which you will attach the application/other initiating document.
**Please do not select the specific codes such as “Application for Involuntary Treatment” - these codes will be turned off/hidden shortly. The type of application is defined by the case type- you just need to select “Initial Filing Confidential”.*
9. The Application should be uploaded as the lead document under the “initial filing – confidential” filing code.
 - Other substantive documents related to the application (e.g. the physician’s statement) may be combined in the same lead PDF document as the application. Alternatively, if needed, such documents may also be added as attachments to the lead document.
 - Cover letters and certificates of service should NOT be included in the same PDF document as the application. Those two documents can be

combined into one PDF and included as an attachment to the lead document.

- If you are filing any additional motions/independent requests for relief, they should be added as a separate filing in the envelope (click “add another filing” and select the appropriate motion code).
10. Click Save changes after each attachment.
 11. Under fees, select your *waiver* account and the filing attorney. *The waiver account needs to be set up by the firm administrator as a payment method.*
 12. Check the submission agreements and click summary
 13. Click Submit if all looks good
 14. You will receive an email confirming the submission of the envelope.

Subsequent filings

Searching for Case: When making a subsequent filing into an existing case you will need to know the case # and county/location. Party names are masked in MH and other confidential case types and will not return on searches. However, a search on the county and case number will return the case. The older pre-Odyssey case numbers will work for searches in their original formats including the county docket letters at the end.

Motions for Revocation: file these as subsequent filings into the existing case in which the order in question was issued. These do NOT need to be new and separate cases.

Service: Attorneys in the Mental Health docket may serve documents in existing cases on each other, either independently or in conjunction with submission of filings to the court, by adding themselves as service contacts onto their cases and using Odyssey File & Serve’s e-service function. For more information on this function, see materials in the self-help section on the Odyssey File & Serve site.

Other resources

- Odyssey File & Serve Self Help (and support contact info): <https://vermont.tylerhost.net/ofswweb>
- The Vermont Rules of Electronic Filing govern all filings through Odyssey File & Serve. The current rules are available at <https://www.vermontjudiciary.org/sites/default/files/documents/PROMULGATED%202012-10-19%20VREF%202020.pdf>
- Additional information and guides about Odyssey File and Serve are available at <https://www.vermontjudiciary.org/about-vermont-judiciary/electronic-access/electronic-filing>