

A decorative graphic consisting of several overlapping, semi-transparent rings in shades of blue and green, arranged in a circular pattern around the central text.

# Vermont e-Filing

Odyssey File and Serve Criminal Filer Demonstration

June 2021

# Agenda

- Judiciary Platforms
- Adding eService Contact
- Add/Edit Attorney Bar Number (aka Attorney Number)
- Demo of Odyssey File and Serve
- Format of PDF, Filing and Document Descriptions, Name Lengths
- Demo of Clerk Review
- Support

# Judiciary Platforms



**eCabinet** – Attorneys are required to maintain updated email address in ecabinet – up to 3 – Court sends Orders, Hearing Notices to these addresses

Going away soon



**Public Portal** – Platform to view case and documents.

Must be a party  
Must apply for elevated access



**Odyssey File and Serve (“OFS”)** – Efile documents, maintain own service contact email address

Has to be a different email than Attorney Licensing



**Attorney Licensing Portal** – Register personal email address for lifetime of attorney licensing

Update Odyssey email  
Email cannot be the same as OFS email

Add eService  
Contact email  
address:

The screenshot displays the eFileVT Filer Dashboard. The top navigation bar includes a home icon and an 'Actions' dropdown menu. The 'Actions' menu is open, showing options: Dashboard, Start a New Case, File Into Existing Case, Filing History, Templates, Firm Service Contacts (highlighted with a pink arrow), Bookmarks, Reports, Help, System Admin, and Filing History Search. The main content area is divided into 'My Filing Activity' (with a table of Pending, Accepted, Returned, Drafts, and Served) and 'New Filing' (with buttons for 'Start a New Case' and 'File into Existing Case'). Below this is the 'Firm Service Contacts' section, which has a search bar and an 'Add Service Contact' button (highlighted with a pink arrow). The footer contains the Tyler Technologies logo and 'eFileVT File & Serve' text, along with 'Go To Assist' and 'Show Me How To...' buttons.

**Filer Dashboard**

**My Filing Activity** ?

Pending
Accepted
Returned
Drafts
Served

**New Filing**

Start a New Case ?    Use a Template ?

File into Existing Case ?

Need help getting started?

**Actions** ▾

- Dashboard
- Start a New Case
- File Into Existing Case
- Filing History
- Templates
- Firm Service Contacts
- Bookmarks
- Reports
- Help
- System Admin
- Filing History Search

**Firm Service Contacts** ?

Search by first or last name

➕ Add Service Contact

**Name**                      **Email**

Tyler Technologies  
eFileVT File & Serve

Go To Assist    Show Me How To...    ▾

Chat    Chat

# Add eService Contact email address, cont'd:

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Tyler Technologies  
File & Serve

Go To Assist Show Me How To...  
Chat Chat

1 - 8 of 8 items

Items per page: 10

<b>First Name</b> Attorney	<b>Middle Name</b> 	<b>Last Name</b> Lawyer
<b>Firm Name</b> Vermont Admin	<b>Email</b> attorneylawyer@lawyer.com	<b>Administrative Copy</b> ? admin@lawyer.com
<b>Country</b> United States of America	<b>Address Line 1</b> 94 State St	<b>Address Line 2</b> 
	<b>City</b> Montpelier	
<b>State</b> Vermont	<b>Zip Code</b> 05602	<b>Phone Number</b> 

**Make This Contact Public**

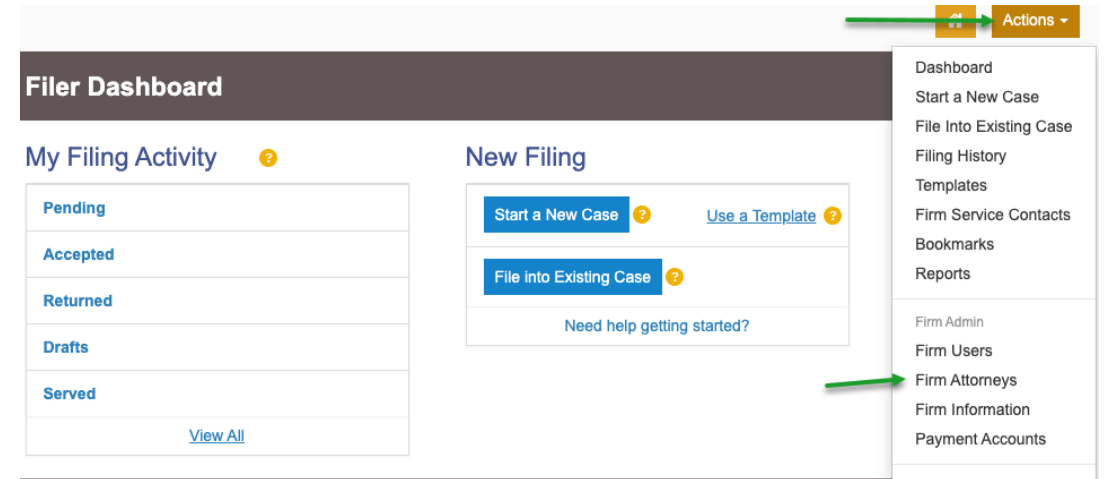
Undo Save Changes

Help

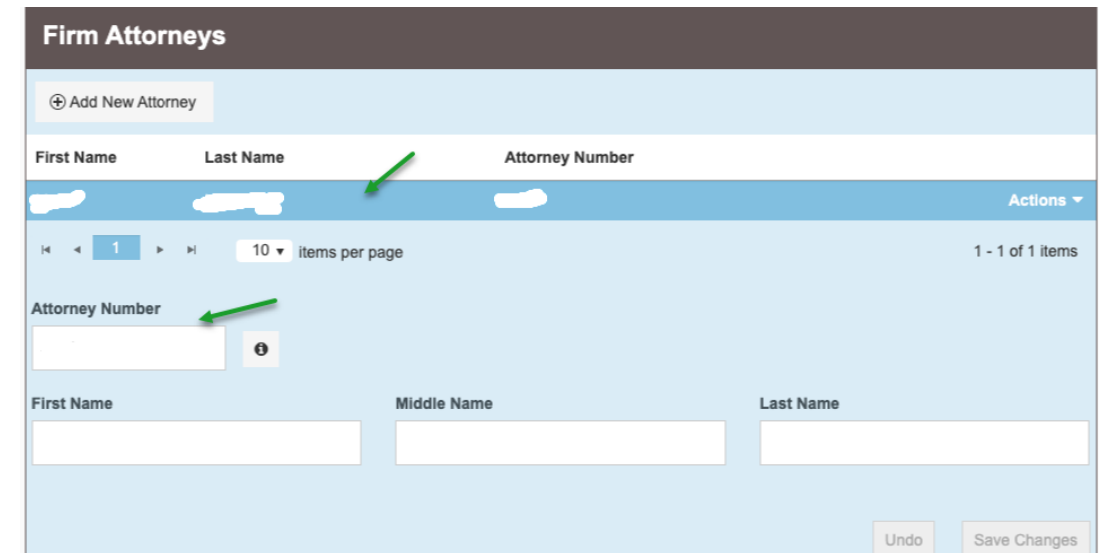
Attorney can add an admin email address for that person to receive copies of service information

# Add Attorney Bar Number

1. Log into the OFS site
2. Click Actions – top right
3. Select Firm Attorneys
4. Click Name to edit number



The screenshot shows the 'Filer Dashboard' interface. On the right side, there is an 'Actions' dropdown menu. A green arrow points to the 'Actions' button in the top right corner. Another green arrow points to the 'Firm Attorneys' option in the dropdown menu. The dashboard includes sections for 'My Filing Activity' (with categories: Pending, Accepted, Returned, Drafts, Served) and 'New Filing' (with options: Start a New Case, Use a Template, File into Existing Case, and a link for help).



The screenshot shows the 'Firm Attorneys' page. At the top, there is a '+ Add New Attorney' button. Below it is a table with columns for 'First Name', 'Last Name', and 'Attorney Number'. A green arrow points to the 'Attorney Number' column header. Below the table, there is a pagination control showing '1' of 1 items and '10 items per page'. Below the pagination, there is an 'Attorney Number' input field with a green arrow pointing to it. At the bottom, there are input fields for 'First Name', 'Middle Name', and 'Last Name', and buttons for 'Undo' and 'Save Changes'.

# How to e-File

- Criminal Initial Filing – must have criminal filer rights - contact [Jud.efileSupport@vermont.gov](mailto:Jud.efileSupport@vermont.gov) to request
- Format for eFiling:
  - PDFs only
  - All Description Fields – cannot be over 100 characters, incl spaces
  - Name lengths cannot be over 100 char.
- Demonstrate New Filing

# Filing a New Criminal Case ~ highlights

Addison Unit

Category ? Case Type

Criminal Felony

Undo Save Changes

**Complete County, Category, Case Type**

**Charge Information**

Offense	Date Of Offense	Statute	
13V2301/1D - MURDER - 1S...	06/01/2021		<b>Enter charge info</b>

+ Add Another Charge

**Party Information**

Party Type	Party Name	Required Party	
Defendant	Tom Defendant		<b>Enter all identifying info on Defendant. If need to select filing attorney, filer should add Plaintiff, State of Vermont, and select attorney</b>

+ Add Another Party

**Filings**

Filing Code	Client Ref #	Filing Description	Actions
State's Attorney Information and P...			Actions
Citation			Actions
Arrest Custody Report			Actions

+ Add Another Filing

**Add all lead documents and attachments as needed**

**State's Attorney Information and Probable Cause Affidavit**

Description	Amount
Filing Fee	\$0.00
<b>Filing Total:</b>	<b>\$0.00</b>

**Citation**

Description	Amount
Filing Fee	\$0.00
<b>Filing Total:</b>	<b>\$0.00</b>

**Arrest Custody Report**

Description	Amount
Filing Fee	\$0.00
<b>Filing Total:</b>	<b>\$0.00</b>

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Total Filing Fee \$0.00  
Envelope Total: \$0.00  
Waiver selected

Payment Account ?

Waiver

Filing Attorney

Vermont Admin

**New Criminal cases require a payment account of Waiver**

**Select filing attorney**



# Demo of Clerk Review Process

How documents look in Odyssey for the court

# Clerk Review Queue ~ Odyssey File and Serve

This is what the envelope looks like on the clerk's screen

Status	Filing Code	Case Type	Filing Description	Queue	Reviewer
Submitted	State's Attorney Information and Probable Cause Affid	Felony		Addison - Criminal	
Submitted	Citation	Felony		Addison - Criminal	
Submitted	Arrest Custody Report	Felony		Addison - Criminal	

If filer includes a Filing Description in filing, it shows up here

|<< 21 of 21 >>|

# Envelope opened for clerk review

Arrest Custody Report.pdf [Original] [PDF]

Description Arrest Custody Report

FILED: <<DocketDate>>  
Vermont Superior Court  
<<CaseLocation>>  
<<CaseNumber>>

Arrest Custody Report

Annotations

Actions

State's Attorney Information and Probable Cause  
Lead Document (Lead)  
Public Limited

Citation  
Lead Document (Lead)

Arrest Custody Report  
Lead Document (Lead)  
Confidential

Edit Verify Parties Waiver

Case Information

Case Number  
Location Addison Unit  
Description  
Category Criminal  
Type Felony  
Status Not Created  
Judge

Criminal Charges

Envelope # 00004361

Submit Date 6/17/2021 10:20 AM  
Docket Date 6/17/2021 10:20 AM  
Filing Attorney Vermont Admin  
Payment Account Waiver

Filer Information

New Parties

Defendant Tom Defendant Additional Info  
111 Main St.  
Addison, VT 05740

Fees Total: \$0.00

Filing Information

Process Notes

Clerk accepts or rejects each Lead Document. If lead document accepted, attachment accepted as well.

Clerk must verify parties by searching in the Odyssey case mgmt system to see if a match exists

Clerk can edit Filing Codes if necessary, and delete description fields if too lengthy

Comments to clerk included in filing show here

View of Documents in Odyssey – Proper labeling ensures that judges, clerks, and anyone accessing the case on the public portal can quickly find the documents needed

☆◀ DISPOSITION TIME STDS FINANCIAL PROT. ORDERS WARRANTS BONDS EXHIBITS **DOCUMENTS** APPEALS ▶

**21-CR-00953**

🔒 **State of Vermont v. Tom Defendant**  
Type Felony

**Documents** Search [Get All Documents](#) Refresh

Show Obsolete Documents  
 Show Document Versions  
 Open in External Viewer  
 Use Default Image Printer

Type All  
Sort Date Descending  
Show All Documents

Actions Export

	Date	OCR	Type	Name	Index #	Pgs	Mark	
	06/17/2021	✓	Confidential Document	Arrest Custody Report		1	x	
	06/17/2021	✓	Public Document	Citation		1	x	
	06/17/2021	✓	Public Limited Document	State's Attorney Information and Probable Cause Affidavit		1	x	

# Errored Envelopes

Some errored envelopes must be rejected by the clerk and then refiled:

Incorrect Bar Number  
(aka Attorney Number  
in OFS)

Formatting problem  
of PDF—contains  
editable fields

Issue with a Charge –  
e.g., not labeled with  
proper degree



States Attorneys cannot refile a Rejected envelope of an *Initial Filing* (new case) using the copy function. Must use **New Envelope** and include original filing date and rejection date in comment to court

## Refile after Rejection

- Most rejected envelopes can and should be refiled by using *Copy Envelope* action
  - Filing must be refiled within 7 days from date of rejection to maintain original filing date
- SAs → If Initial filing is rejected, must refile with new envelope
- If incorrect Bar Number → must refile with new envelope
  - If refile with new envelope, should include original filing date, and rejected date in comment to court

# Support

- Technical issues such as browser problems – must contact Tyler Technologies: [efiling.support@tylertech.com](mailto:efiling.support@tylertech.com) or 1.800.297.5377
- Specific questions about e-Filing process- email [Jud.efileSupport@vermont.gov](mailto:Jud.efileSupport@vermont.gov)
- Questions about ecabinet – email [jud.helpdesk@vermont.gov](mailto:jud.helpdesk@vermont.gov)
- Questions about Public Portal – email [jud.helpdesk@vermont.gov](mailto:jud.helpdesk@vermont.gov)
- Questions about Attorney Licensing Portal – email [jud.attorneylicensing@vermont.gov](mailto:jud.attorneylicensing@vermont.gov)

# Resources

- Filing Guides on Judiciary Website:  
<https://www.vermontjudiciary.org/about-vermont-judiciary/electronic-access/electronic-filing>
- User Guides on OFS Home page
- eFiling FAQ site on Judiciary Website

