



# eService with Odyssey File & Serve

v2 March 2021

## *Table of Contents*

Introduction: .....	1
Creating a Service Contact and Adding to the Public List .....	2
Using Service Contacts when Filing.....	3
Checking the Status of Service .....	5
Using Firm Service Contacts .....	6
Using “Serve” Only .....	7
Adding a Service Contact: Other Methods.....	8
Editing, Removing and Replacing Service Contacts .....	9
Service on non-eFilers .....	11
Agreements for Alternative Service .....	11
Help and Support .....	11
eService FAQs .....	12

## *Introduction:*

Odyssey File & Serve’s Serve feature offers an efficient integrated method for electronically serving copies of documents on opposing parties simultaneously with submission to the Court. The Vermont Rules for Electronic Filing generally require eFilers to complete service through the Serve function unless specific exceptions apply. To comply with the rules, all eFilers must create a service contact associated with their account upon registration and must add that service contact to the Public List of service contacts.

This guide provides specific instructions related to electronic service. It is not intended as a comprehensive guide to the eFiling system. More detailed guides and other resources are available in the Help section of Odyssey File and Serve <https://odysseyfileandserve.zendesk.com/hc/en-us>. *Both the Firm User and Individual User Guides each cover electronic service in Chapter 12.*

There is also a Vermont Electronic Filing policy and procedure guide as well as division-specific user guides on the Judiciary website for filing into various case types at: <https://www.vermontjudiciary.org/about-vermont-judiciary/electronic-access/electronic-filing>

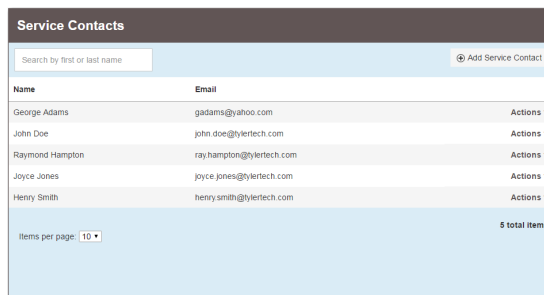
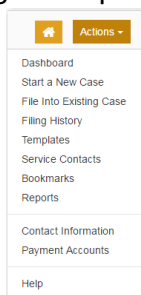
## Creating a Service Contact and Adding to the Public List

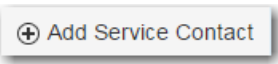
A Service Contact is a person for whom an email address and other identifying information has been entered into the eFiling system as a designated recipient of service on case filings from other parties through the eFiling system.<sup>1</sup>

Upon registering in Odyssey File and Serve (OFS) all eFilers are required to create a Service Contact and add it to the Public List<sup>2</sup>, which is a searchable listing of service contacts for system users that those users have created and made publicly available for other users to select for service.

To complete these steps:

- A. From the Actions dropdown on the *Filer Dashboard* page select “Firm Service Contacts” (firm users) or “Service Contacts” (individual users). The *Service Contacts* page is displayed.



- B. Click “Add Service contact” . The *Service Contacts* Page for adding a new contact is displayed. Complete the required fields to add the new service contact and **make sure to check the box in the lower left labeled “Make this Contact Public”**. This is the step that will add the service contact to the Public List.

A screenshot of the 'Add Service Contact' form. The form has several fields: First Name (Joe), Middle Name (empty), Last Name (Lawyer), Firm Name (Big Fancy Law Firm), Email (vlegaldude@gmail.com), Administrative Copy (joesadmin@gmail.com), Country (United States of America), Address Line 1 (123 Main St), Address Line 2 (empty), City (Big Town), State (Vermont), Zip Code (05032), and Phone Number (empty). At the bottom left, there is a checkbox labeled 'Make This Contact Public' which is checked. At the bottom right, there are 'Undo' and 'Save Changes' buttons.

Administrative Copy: additional email recipients, separated by commas, may be entered here. They will not be visible on the Public List, but every time this service contact is selected for service, those emails would also receive a copy of the service.

Click “Save Changes” to save the new service contact.

<sup>1</sup> V.R.E.F. 2(k)

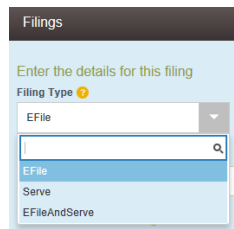
<sup>2</sup> V.R.E.F 4(b)(3)

*Note: eFilers may create additional service contacts in their individual or firm accounts that are not added to the Public List, as long as they have one valid service contact available on the Public List.*

*Users should NOT create or save service contacts for opposing parties/counsel but should only add opposing service recipients from the Public List.*

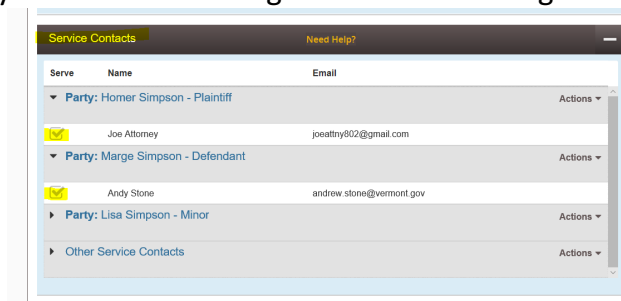
### *Using Service Contacts when Filing*

- A. When completing a new or subsequent case filing the filer must **ensure that “eFile and Serve” is selected** as the filing type. “eFile and Serve” is the default filing type for all subsequent filings into existing cases. For new case filings, however, “eFile” only is the default, so the filer would have to change that manually on the dropdown in order to use eService on a new case.



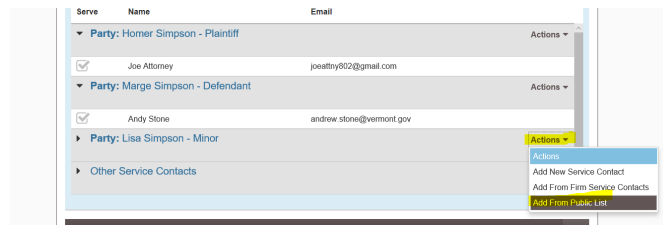
*Note: Where a rule or statute requires personal service for initiating an action, service must still be made by the applicable method and cannot be done through the eFiling system.*

- B. After completing and saving the filings section, the Service Contacts section will be displayed. If there are existing Service Contacts on the case, they will be displayed and will be checked by default as receiving service on the filing.

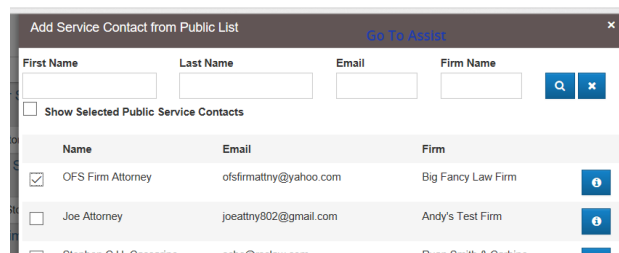


If all parties needing to be served already have service contacts attached and all are checked off as receiving service, no further actions are needed. Proceed to the Fees section.

- C. To add a new service contact for an opposing party/attorney from the Public List, click on the “Actions” dropdown next to that party and select “Add from Public List”.



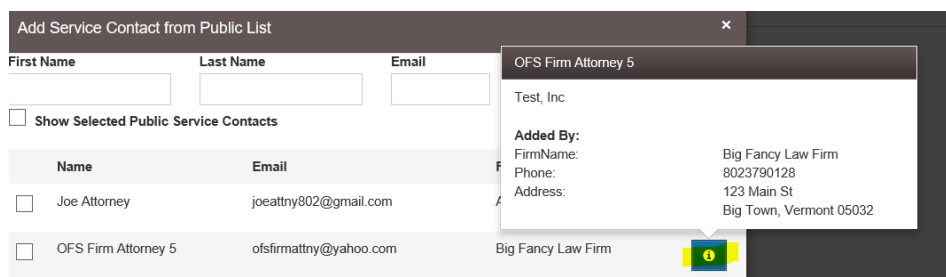
- D. The Public List will display. Search by first or last name, email or firm name to find the desired service contact. Check the box next to the desired service contact and click “Save” to add the service contact to the case.



*\*If you do not see an available service contact for an opposing party, do NOT create one for them. You will have to serve the filing through alternative means.<sup>3</sup> Note that self-represented litigants are not mandated to eFile and many will not have elected to receive service this way.*


- E. Ensuring Selection of a Valid Service Contact:

The Public List currently contains numerous duplicate service contacts that were a result of an automated conversion process. The Judiciary is working with Tyler to clean these up, and in the meantime, filers should take care to select a valid and correct service contact for the recipient. Checking for the correct email address, if known, is effective, and if the correct email address is not known, the filer can also click on the small “i” icon next to the service contact listing to see by whom the contact was added to the public list: **filers will want to select the contact that was created and added by the recipient themselves, or by their organization.**



<sup>3</sup> VREF 11(e)

- F. After submitting the filing and getting a *Submitted Filing Notification* email, the filer will then receive an *Accepted Filing Notification* email when the court clerk has accepted the filing into Odyssey. This is the point at which service is sent electronically to the selected service contacts on the filing. Both the filer and the recipients of service will receive *Notification of Service* emails containing a link to the served document(s).



**Notification of Service**

Case Number: 21-DM-00227  
Case Style: Homer Simpson v. Marge Simpson  
Envelope Number: 3706

This is a notification of service for the filing listed. Please click the link below to retrieve the submitted document.

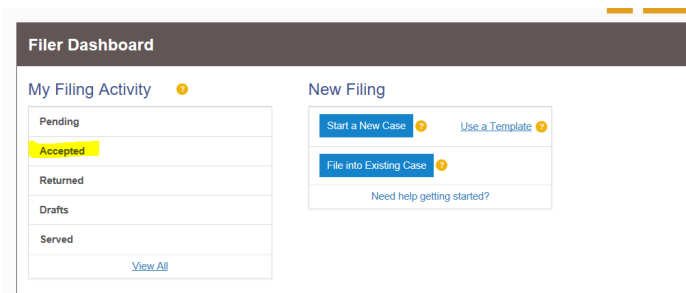
Filing Details	
Case Number	21-DM-00227
Case Style	Homer Simpson v. Marge Simpson
Date/Time Submitted	3/4/2021 1:13 PM EST
Activity Requested	Motion for Temporary Relief
Filing Description	Motion for possession of bank account
Filed By	Joe Attorney
Service Contacts	Homer Simpson: OFS Firm Attorney ( <a href="mailto:ofsfirmattny@yahoo.com">ofsfirmattny@yahoo.com</a> ) Joe Attorney ( <a href="mailto:joeattny802@gmail.com">joeattny802@gmail.com</a> )  Marge Simpson: Andy Stone ( <a href="mailto:andrew.stone@vermont.gov">andrew.stone@vermont.gov</a> )

Document Details	
Served Document	<a href="#">Download Document</a>

*Checking the Status of Service*

- A. A filer may check the status of service from their filing history on the *Filer Dashboard*. After receiving notification that the filing was accepted and that service was sent, find the filing in the “Accepted” folder under “My Filing Activity”.



- B. From the “Actions” dropdown on the filing, select “View Envelope Details”.

Accepted	Exhibit	EFile	Exhibit List
▼	Case # 20-DM-00600 - Margie Simpson v. Homer Simpson Envelope # 3226 filed Tuesday, February 2, 2021 at 9:44 AM EST by ofsfirm attny		
Accepted	Document	EFileAndServe	
▼	Case # 20-DM-00801 - Test Plf v Test Def Envelope # 3141 filed Monday, December 28, 2020 at 12:38 PM EST by ofsfirm attny		

Actions ▼

Actions

View Envelope Details

View Service Contacts

File Into Case

File Into Case With Template

C. Click the “View Receipt” button at the bottom.

<b>Envelope Id</b> 3226	<b>Submitted Date</b> 2/2/2021 9:44 AM EST	<b>Submitted User Name</b> ofsfirmatry@yahoo.com
<b>Case Information</b>		
<b>Location</b> Chittenden Unit	<b>Category</b> Family	<b>Case Type</b> Dissolution Contested with
<b>Case Initiation Date</b> 10/9/2020	<b>Case #</b> 20-DM-00600	
Party Information		
Filings		
Service Contacts		
Parties with No eService		
Fees		
<a href="#">Return to Filing History</a>	<a href="#">View Receipt</a>	

D. The Receipt page will open up with information about the filing, when and on whom it was served, and when/whether recipients viewed the served document(s):

**Filings**

<b>Filing Type</b> EFileAndServe	<b>Filing Code</b> Document
<b>Courtesy Copies</b> ajstonevt@yahoo.com, andrew.stone@vermont.gov	
<b>Filing Status</b> Accepted	<b>Accepted Date</b> 2/2/2021 10:10 AM EST

**Lead Document**

File Name	Description	Security	Download
TEST DIVORCE STIPULATION.pdf	Document	Public Limited	<a href="#">Original File</a> <a href="#">Court Copy</a>

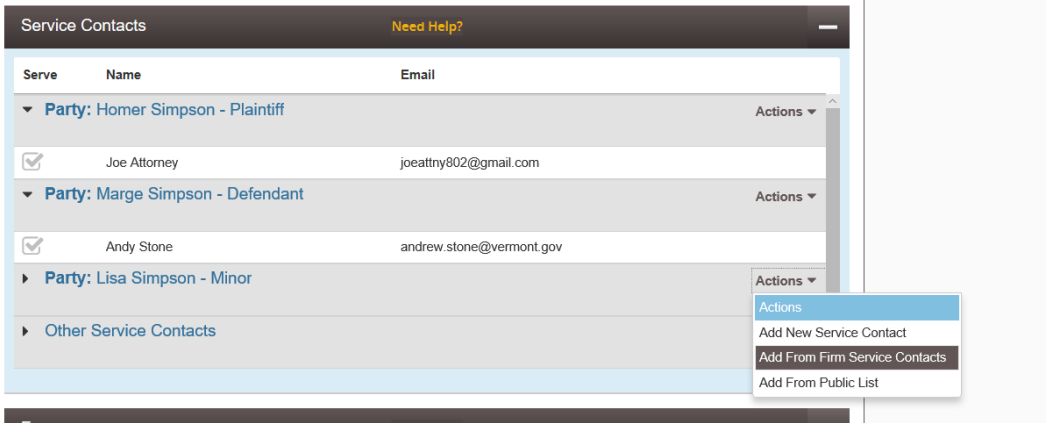
**eService Details**

Status	Name	Firm	Served	Date Opened
Sent	Andy Sone	Big Fancy Law Firm	Yes	3/8/2021 12:02 PM EST
Sent	Joe Lawyer	Big Fancy Law Firm	Yes	Not Opened

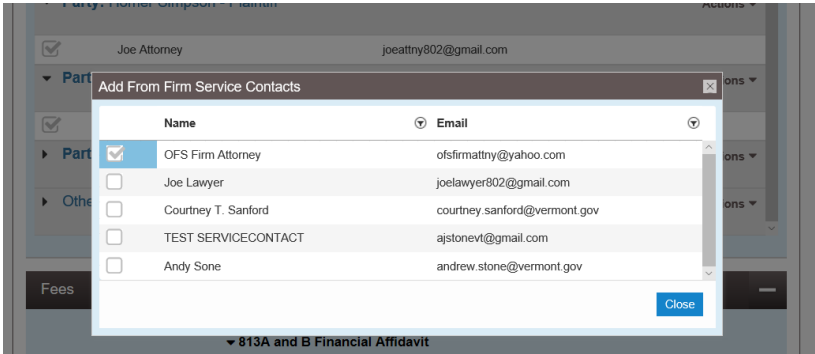
*Using Firm Service Contacts*

Filers may maintain additional firm or individual service contacts for themselves and their own organization that may or may not also be on the Public List (as long as they have one valid service contact publicly available). These may be used to add a service contact for one’s self or another person within one’s own firm/organization to cases for service. *This may be useful if an eFiler wants to receive service at a different email or have different administrative copy emails included for different case types.*

To add a service contact for oneself/ one’s client during a filing, in the service contacts section click the “Actions” dropdown next to the appropriate party and select “Add from Firm Service Contacts”.

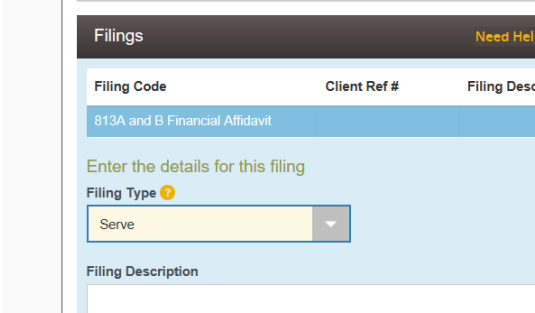


A list of existing contacts within the firm will be displayed. Select the desired service contact and click “close” to add it to the case.



*Using “Serve” Only*

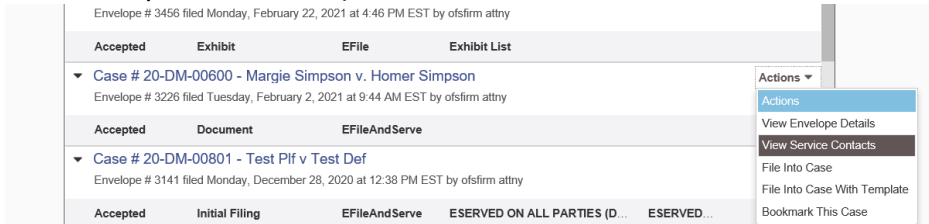
eFilers may serve documents on one another without filing with the court by selecting “Serve” rather than “eFile” or “eFile and Serve” as the filing type on their envelope. *This can be used for things like interrogatories and other discovery that does not get filed into the court case.*



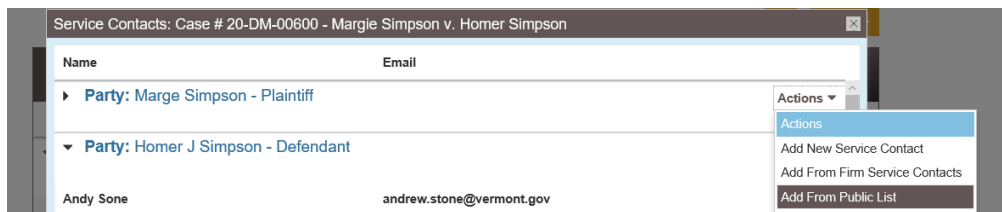
## Adding a Service Contact: Other Methods

Service Contacts may be also added to a case (for service on potential future filings) without submitting or serving a filing. This can be done in 2 ways:

- A. From the filer's Accepted Filing History (if a filer has previously submitted an envelope on the case): select "View Service Contacts"



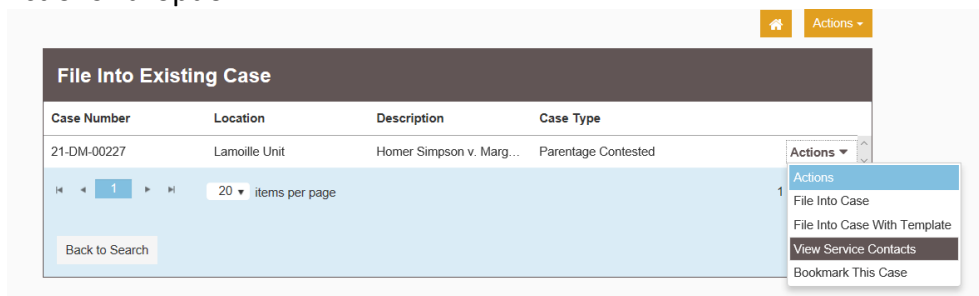
Service contacts may then be selected from the Firm Service Contacts List or from the Public List.



*\*Do NOT select "Add New Service Contact" here to create a service contact for an opposing party. Service contacts should only be added from Firm Service Contacts (for oneself/one's organization) or from the Public List (for opposing parties). If the intended recipient of service does not have an available service contact on the Public List then they must be served through alternative means.*

- B. Through the "File into Existing Case" function. You do not need to go all the way through submitting here- this function also allows case lookup for this purpose.

After selecting "File into Existing Case" from the Filer Dashboard and searching by either name or case number to find the case, select "View Service Contacts" from the "Actions" dropdown.





Service contacts may then be added from Firm Service Contacts or from the Public List.

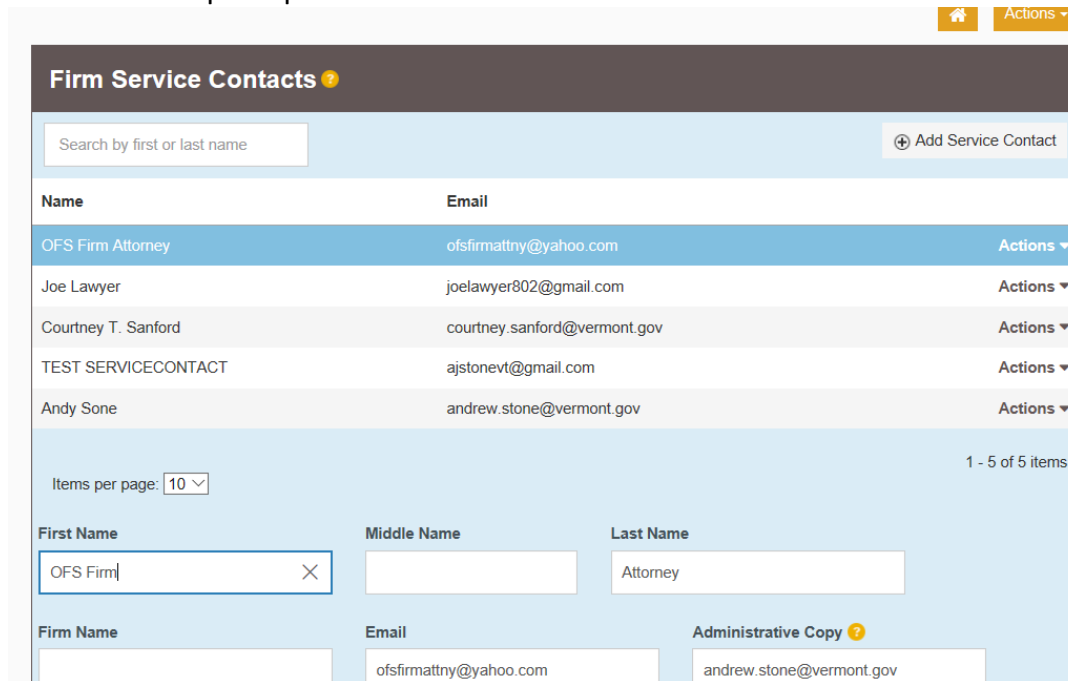


Click “Close” after adding service contact(s).

### *Editing, Removing and Replacing Service Contacts*

Existing service contacts may be modified, deleted or replaced by selecting “Service Contacts”(individual) or “Firm Service Contacts” (firm users) from the Actions dropdown on the Filer Dashboard.

- A. To edit an existing service contact: click directly on the line with the name and email to open up the Service Contact details.



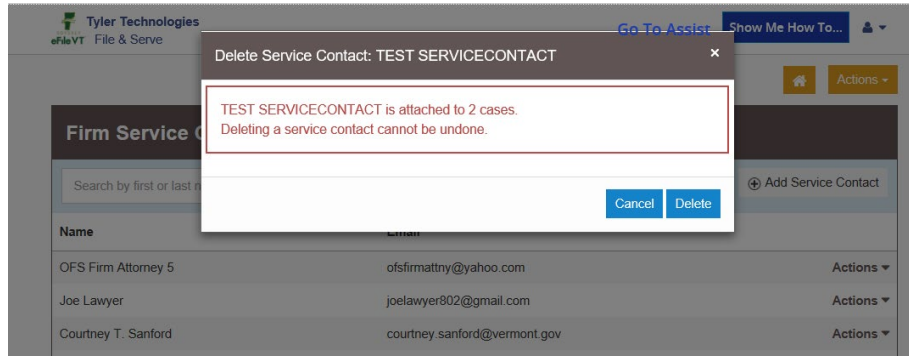
Make necessary edits and then click “save changes”.

If this service contact is already added to the public list, the updates will apply there.

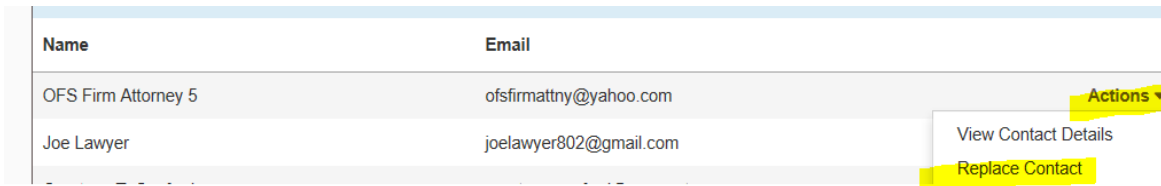
If the service contact was not previously on the Public List and you want to add it now, click “Make this Contact Public” before saving.

- B. To delete an existing contact: select “Delete Contact” from the small “Actions” dropdown next to the service contact to be deleted.

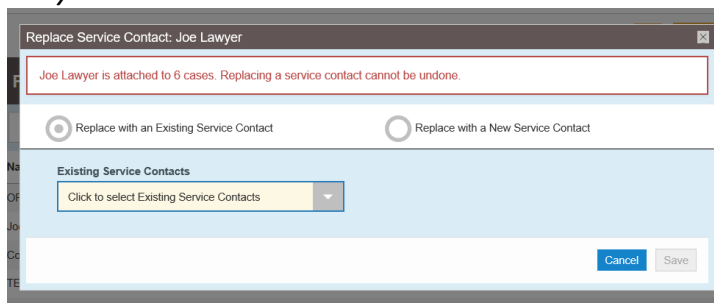
The user will have to confirm the action by clicking “Delete”. If the service contact is currently attached to any cases, the confirmation box will also provide this notice.



- C. To replace one service contact with another: select “Replace Contact” from the “Actions” dropdown next to the service contact to be replaced.



If the service contact is currently attached to any cases, a warning will be displayed. The user can select another Existing Service Contact from the dropdown list of available Firm Service Contacts, or can create a new Firm Service Contact by clicking “Replace with a New Service Contact”. *This is particularly useful if one attorney is taking over another’s entire caseload, or if service on all of the attorney’s cases should now be directed elsewhere.*



After selecting a replacement service contact and clicking “save”, the service contact is replaced not only on the list of Firm Service Contacts but also on all cases to which the previous service contact had been attached.

### *Service on non-eFilers*

Filers must attest on each filing, through completion of a required submission agreement checkbox that they have met their service obligations<sup>4</sup> by either:

- A. Serving all parties requiring service through their service contacts in Odyssey File and Serve. *When all parties requiring service are served through the eFiling system, no separate certificate of service needs to be filed.*

Or

- B. Serving one or more parties through alternative means allowed under applicable rules and attaching (as an attachment to a lead document) a Certificate of Service document with the filing that details the time, nature and contents of the service. *This method will be required for eFilers serving documents upon non-eFilers or those who have not created a publicly available Service Contact.*

### *Agreements for Alternative Service*

The Vermont Rules of Electronic Filing allow parties to agree to serve one another through alternative means<sup>5</sup> (other than through the eFiling system) for the duration of a case, provided that the agreement is written and is filed electronically with the court. Certificates of Service are still required for filings being served under such agreements.

### *Help and Support*

In addition to the Tyler help resources and the Vermont filer guides referenced and linked in the introduction to this guide, Vermont has a dedicated eFiling support desk for user support. Please contact [jud.efilesupport@vermont.gov](mailto:jud.efilesupport@vermont.gov) for any Vermont-specific procedural questions regarding electronic service.

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<sup>4</sup> VREF 11(g)

<sup>5</sup> VREF 11(d)(2)

## *eService FAQs*

**Q: I put opposing counsel's email address in the "courtesy copy" field in my filing. Is this the same as eService?**

*No. Courtesy copies are not the same as eService and filers are discouraged from using this feature. Using the courtesy copy feature is not compliant for eService and courtesy copy emails are not tracked or guaranteed and receipt is not verifiable.*

**Q: Doesn't the system automatically send me a notification anyway whenever something is filed in my case?**

*No. The notifications you receive from the court (e.g., when an order is issued or a hearing is scheduled) come from a different source and are based on a different process from filing and service notifications in OFS. It remains the filer's obligation to serve copies of filed documents on opposing parties; the eService feature in OFS is designed to make this simple.*

**Q: What is the difference between eFiling only, eFiling and serving and service only filing types?**

- *E-file Only: your filing is only being e-filed to the court.*
- *E-file and Serve ): your filing will be e-filed to the court as well as being served electronically to those on the service contact list.*
- *Serve Only : your filing will only be electronically served to those on the service contact list.*

**Q: Do I have to file into a case to add a service contact?**

*No. While you have the option to add the service contact when you search for the case, the preferred method is to select service contacts from the public contacts list at the time of filing.*

**Q: How do I view service contacts attached to an existing case?**

*To view service contacts in a case you have filed into:*

- *In your filing history, click on the Actions button next to the case in question*
- *From the drop down, select View service contacts.*

*This will allow you to see service contacts that have already been attached to a case.*

*To view service contacts on a case you have not filed into:*

- *Click on File into Existing Case*
- *Search for the case*
- *When the case is showing, click on the black actions to the right*
- *Click on view service contacts.*

**Q: How do you view the list of cases a service contact is attached to?**

- Click the orange 'Actions' button to the top right of the page.
- Click 'Firm Service Contacts' on this menu.
- Find the contact you want to view the attached cases for.
- Click the black 'Actions' button to the right of the contact's name.
- Click 'View Attached Case List'. List will display.

**Q: What is an Administrative Copy recipient in a Service Contact?**

*Adding additional recipient email addresses in the administrative contact field allows those recipients to also receive copies of the same documents that are sent to the service contact.*

**Q: How do I add an administrative copy to a Service Contact?**

*To add an administrative copy to a service contact please follow the steps below:*

- Click the Actions button in the upper right hand corner and select Firm service contacts
- Select the service contact to which you want to attach the administrative copy email
- Another box will populate with the service contact information, enter the administrative email address under the Administrative Copy field. Click Save Changes on the lower right hand side of the screen

**Please Note:** *You may enter multiple email address in the administrative copy field, you will just need to separate the email addresses with a comma.*

**Q: Do the service contacts receive a Filed Stamped copy of the document that I filed?**

*In order for individuals to be served with a document, the envelope must be an e-File & Serve or Serve Only filing. If the envelope includes service then the service contacts will receive a link to document that was filed.*

*The contact's email address **must** be attached to the service contacts section of the filing in order to receive the notification.*

**Q: According to the court docket I see a filing was done on a particular case. Why didn't we receive notification of that filing from opposing counsel?**

*There are a few reasons why this could have occurred:*

1. *If the filing party did not add eService to the filing, then you will not be e-Served with the document. These filings are referred to as E-Filed Only.*
2. *You were deselected as a contact for this filing.*
3. *You were added to the service contact list AFTER the filing was submitted.*