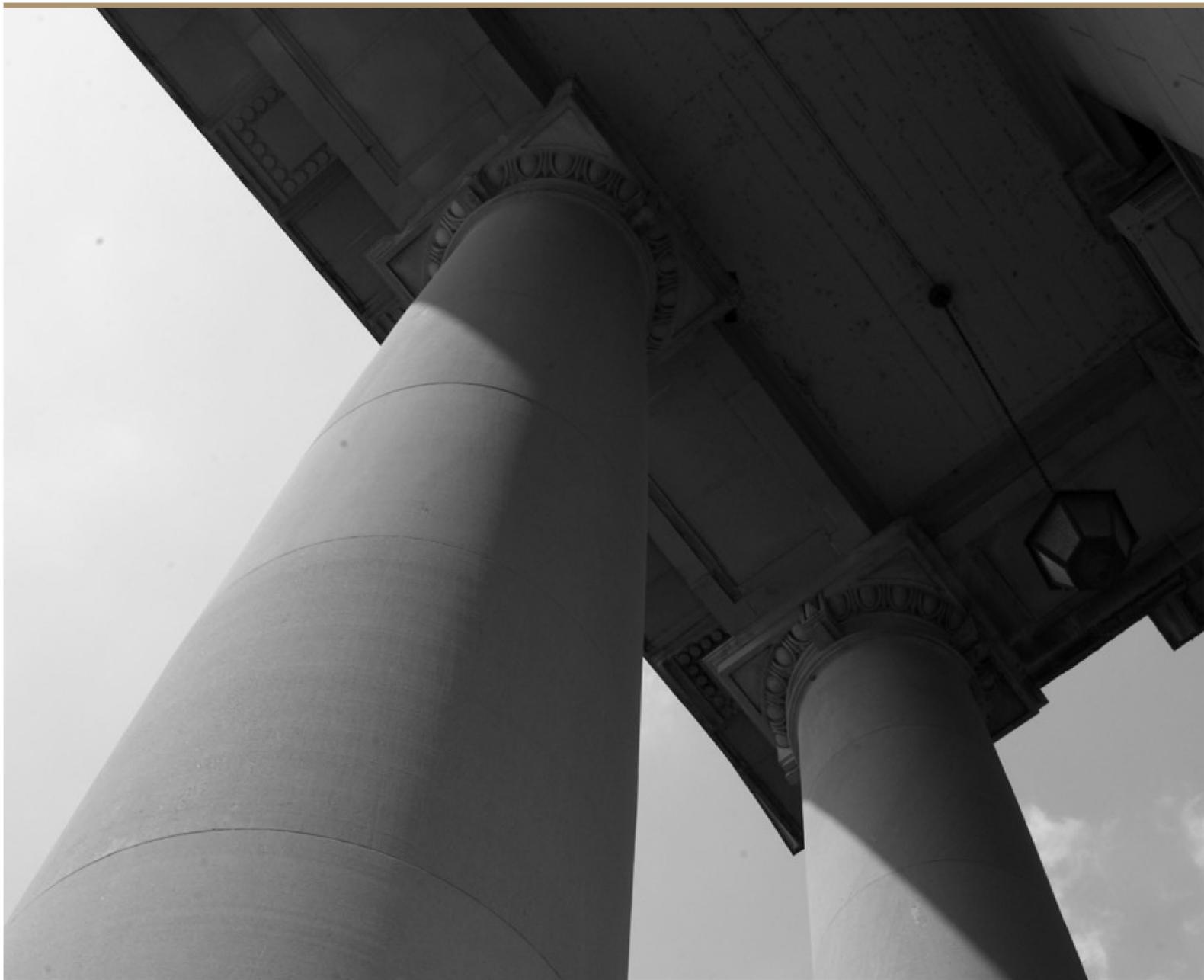




ECOURTS

SERVICE OPTIONS IN FILE & SERVE



SERVICE OPTIONS IN FILE & SERVE

Step 1 - On the Dashboard click **Start Filing**

The screenshot shows the eFileNC dashboard interface. At the top, the header includes the eCourts File & Serve logo, the text "eFileNC Stage ***** THIS IS A TEST SITE", and user information "SU". A vertical sidebar on the left contains navigation icons. The main content area is divided into several sections: "Start filing" (with a blue "Start filing" button highlighted by a red box), "Filing history" (listing cases like "Case # 23CR101000-590" and "Envelope # 5454"), "Drafts" (listing drafts like "Draft # 4839" and "Draft # 4793"), "Case search" (showing search results for "Case # '23CR101000-590'"), "Bookmarks" (listing "23E003807-590 - IN THE MATTER OF THE ESTATE OF Ted Tester"), and "Templates" (listing "Test Template for Mecklenburg"). A yellow "Support" button is visible in the bottom left corner.

Step 2 - Select **File into existing case**.

The screenshot shows the "Start Filing" screen. The header includes the eCourts File & Serve logo, the text "eFileNC Stage ***** THIS IS A TEST SITE", and user information "SU". A vertical sidebar on the left contains navigation icons. The main content area has a back arrow and the text "Start Filing". There are two main options: "File New Case" (with a blue "Start new case" button) and "File Into Existing Case" (with a blue "File into existing case" button highlighted by a red box). The "File Into Existing Case" option includes a magnifying glass icon and the text: "If the case was started by you or someone else and you have the case number or names of the parties to find the case."



Step 3 - Search for the existing case by location and Case Number or Party Name

eCourts
File & Serve

eFileNC Stage ***** THIS IS A TEST SITE

Search for case

If you are not sure your case number is correct, refer to the formatting instructions for the selected court or search for the case by party name.

* Location

Location is Required.

Search for Case by

Case Number Party Name

Type your case number exactly as you see it on your case documents.

Case Numbers in Odyssey

Case numbers in Odyssey can be broken down into four parts; year, case type, case number, and county identifier.

21CR000003-910

YEAR	CASE TYPE	SEQUENCE NUMBER	COUNTY IDENTIFIER
YEAR	The first two numbers signify the year in which the case was established.		
CASE TYPE	The two letters signify the case type.		
SEQUENCE NUMBER	The set of numbers signifies the sequential order or numbering.		
COUNTY IDENTIFIER	The hyphen plus the last three numbers is the county identifier.		

The below case types will be converted from legacy AND remain a one letter Case Type format in Odyssey.

- Civil Magistrate CVM
- Civil Superior CVS
- Civil Transcript "T"
- Miscellaneous Civil Judgments "M"
- Registration "R"
- Estates, etc. "E"

Click here for the county identifier.

Click here for more case search tips.

* Case Number

Sort Results By
Newest to Oldest

Cancel Search



Step 4 - From the search result, select the **Action** button to the case you want to file in. and then select **File into case**.

The screenshot shows the 'Case Search Results' page. At the top, it says 'eCourts File & Serve' and 'eFileNC Stage ***** THIS IS A TEST SITE'. The search results show one result for 'STATE OF NORTH CAROLINA VS CLARK KENT' with Case # 23CR101000-590. The location is 'zTEST2 - Mecklenburg District Court', Case Category is 'Criminal', and Case Type is 'Criminal'. An 'Actions' dropdown menu is open, with 'File into case' highlighted. Other options include 'File into case with template', 'View Service contacts', and 'Bookmark case'. A 'Refine Search' button is visible in the top right.

Step 5 - On the **Case Information** Tab click on **Parties** button.

The screenshot shows the 'File Into Case' page. The breadcrumb trail is 'Draft # 4839 - Case # 23CR101000-590 - STATE OF NORTH CAROLINA VS CLAR...'. The navigation tabs are '1 Case information', '2 Parties', '3 Filings', '4 Service', '5 Fees', and '6 Summary'. The 'Case information' tab is selected, showing details for 'Court Location: zTEST2 - Mecklenburg District Court', 'Case Category: Criminal', and 'Case Type: Criminal'. At the bottom, there is a 'Support' button, a 'Save Draft and Exit' button, and a 'Parties' button with a right arrow, which is highlighted with a red box.



Step 6 - On the **Parties** Tab click on **Filings** button.

The screenshot shows the 'Parties' tab in the 'File Into Case' section. The breadcrumb trail is: Case information (checked) > **Parties** > Filings > Service > Fees > Summary. The 'Parties' section contains a table with the following data:

Party Type	Party Name	Lead Attorney	Actions
State	STATE OF NORTH CAROLINA		
Defendant	CLARK KENT		

Below the table is a '+ Add More' button. At the bottom right, the 'Filings' button in the breadcrumb trail is highlighted with a red box.

Step 7 - On the **Filings** Tab click on **Add Filing** button.

The screenshot shows the 'Filings' tab in the 'File Into Case' section. The breadcrumb trail is: Case information (checked) > Parties (checked) > **Filings** > Service > Fees > Summary. The 'Filings' section displays a message: 'No Filings Added Yet' with a magnifying glass icon. Below the message is a '+ Add filing' button, which is highlighted with a red box. The message also includes: 'At least one filing is required to complete the filing process.' and 'Max Envelope Size: 36.70 MB Remaining: 36.70 MB'.



Step 8 - Provided below are the various service and efileg options from which you can choose along with an explanation of how the document is filed or served under the chosen option.

Option (a) - Select the **eFile and Serve** option under **Filing Type**, enter the Filing Code, upload the document, and select the appropriate document security and click **Save**.

The screenshot shows the 'Edit Filing Details' form in the eCourts system. The 'Filing Type' section is highlighted with a red box, showing three options: 'eFile Only', 'eFile and Serve' (selected), and 'Service Only'. The 'Filing Information' section includes fields for 'Filing Code', 'Filing Description', 'Client Reference Number', and 'Comments to Court'. The interface also features a top navigation bar with 'File Into Case' and 'Edit Filing Details', and a bottom bar with 'Support', 'Cancel', and 'Save' buttons.

When a user selects the "eFile and Serve" function in OFS, the system will immediately send the document(s) to the clerk for review. After the clerk reviews and accepts the filing, the system will: (1) apply the file-stamp at the bottom of the lead page of each electronic file, (2) place the file-stamped document(s) into the official electronic court file, (3) send an email notification to the user that provides a link to the file-stamped document(s), and (4) send an email notification to each Service Contact selected by the user that provides a link to the file-stamped document and lists all Service Contacts that receive the notification. The system will not include in the official court record any information on service (e.g., list of Service Contacts and confirmation of service). Users have two options to obtain documentation of service and must file the documentation to include it in the official court record. First, the user can include their own email address as a Service Contact and receive the same email notification. Second, the OFS system records the transaction, and the user can print a copy of that record at any time after the "service" function has been completed. A user is not required to use the system generated documentation of service as their Certificate of Service and is always free to draft their own Certificate of Service and file it along with the corresponding document.



Option (b) - Select the **Service Only** option under **Filing Type** (Filing Code defaults to Service Only), upload the document, and select the appropriate document security and click **Save**.

The screenshot shows the 'Edit Filing Details' interface. At the top, it says 'File Into Case' and 'Draft # 4839 - Case # 23CR101000-590 - STATE OF NORTH CAROLINA VS CLAR...'. The main section is titled 'Edit Filing Details' and has three tabs: 'Filing Requirements', 'Additional Services', and 'Communications'. Under 'Filing Requirements', there is a section for '* Filing Type (Required)'. It contains three radio button options: 'eFile Only' (with the instruction 'Pick "eFile Only" to just electronically file your papers.'), 'eFile and Serve' (with the instruction 'Electronically file your papers with the court and have your documents sent to the selected service contacts.'), and 'Service Only' (with the instruction 'Your filing will only be sent to the selected service contacts and will not be filed with the court.'). The 'Service Only' option is selected and highlighted with a red box. Below this is the 'Filing Information' section, which includes a dropdown for 'Filing Code' (set to 'Service Only'), a text field for 'Filing Description', a text field for 'Client Reference Number', and a text area for 'Comments to Court'. At the bottom left is a 'Support' button, and at the bottom right are 'Cancel' and 'Save' buttons.

When a user performs the "service only" function in OFS, the system will immediately send an email notification to each Service Contact selected by the user. Each "Service Contact" selected will receive an email notification that provides a link to the document that is being served and lists all Service Contacts that receive the notification. The system will not send the document to the clerk and the document will not be file-stamped or become a part of the court file. The system will not include in the official court record any information on service (e.g., list of Service Contacts and confirmation of service). Users have two options to obtain documentation of service and must file the documentation to include it in the official court record. First, the user can include their own email address as a Service Contact and receive the same email notification. Second, the OFS system records the transaction, and the user can print a copy of that record at any time after the "service only" function has been completed. A user is not required to use the system generated documentation of service as their Certificate of Service and is always free to draft their own Certificate of Service and file it along with the corresponding document.



Option (c) - Select the **eFile Only** option under **Filing Type**, enter the Filing Code, upload the document, and select the appropriate document security and click **Save**.

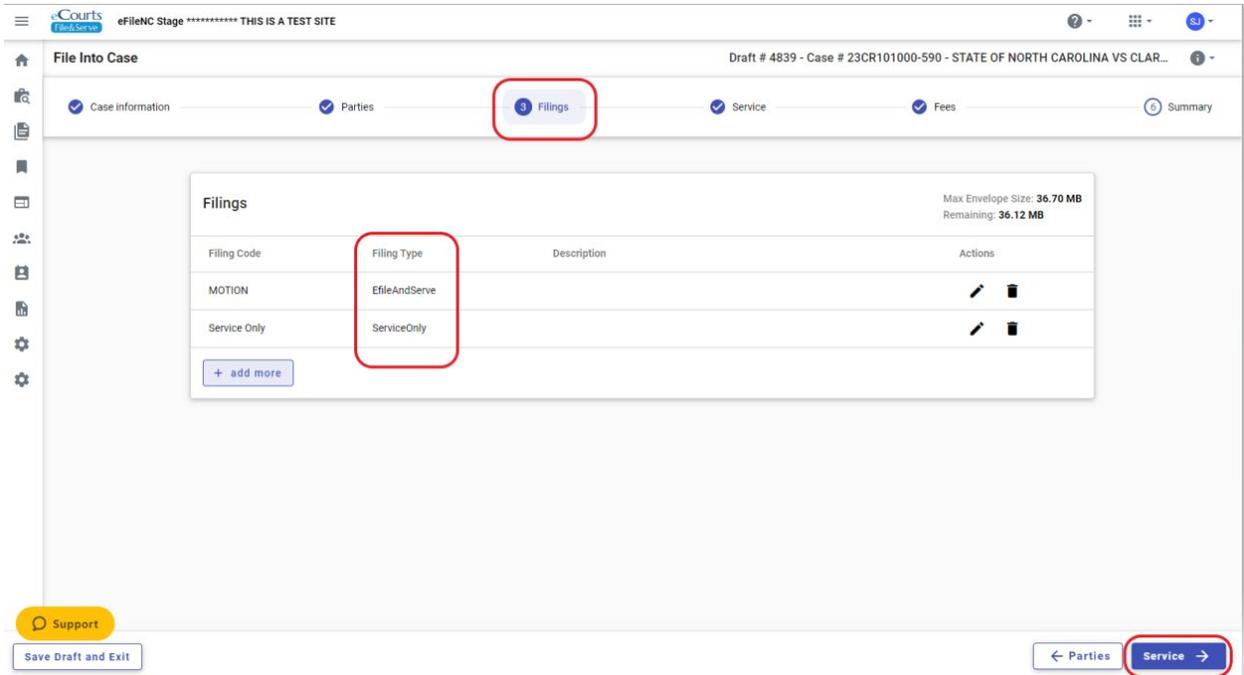
The screenshot shows the 'New Case Filing' interface in the eCourts File & Serve system. The page title is 'New Case Filing' and the draft number is 'Draft # 4845'. The main heading is 'Edit Filing Details'. There are three tabs: 'Filing Requirements' (active), 'Additional Services', and 'Communications'. Under 'Filing Requirements', there is a section for '* Filing Type (Required)' with a radio button selected for 'eFile Only'. Below this is a 'Filing Information' section with fields for '* Filing Code', 'Filing Description', 'Client Reference Number', and 'Comments to Court'. At the bottom, there is a 'Support' button and 'Cancel' and 'Save' buttons.

When a user performs the "eFile only" function in OFS, the system will immediately send the document(s) to the clerk for review. After the clerk reviews and accepts the filing, the system will: (1) apply the file-stamp at the bottom of the lead page of each electronic file, (2) place the file-stamped document(s) into the official electronic court file, and (3) send an email notification to the user that provides a link to the file stamped document(s). Parties are not served through the eFile only function.



Option (d) - In subsequent filings, you can choose to add more than one document and apply a combination of the methods set out in of 8(a), 8(b), or 8(c) within the same envelope. You can also use a combination of the 8(a), 8(b), or 8(c) methods with one document. The benefit of using a combination of methods for one document is that, depending on the combination selected, you can file, and document and service of that document can be immediately accomplished without waiting for clerk review and acceptance.

Example (i) - Example of one document, with both eFile and Serve and Service Only selected; service immediately accomplished for all documents.

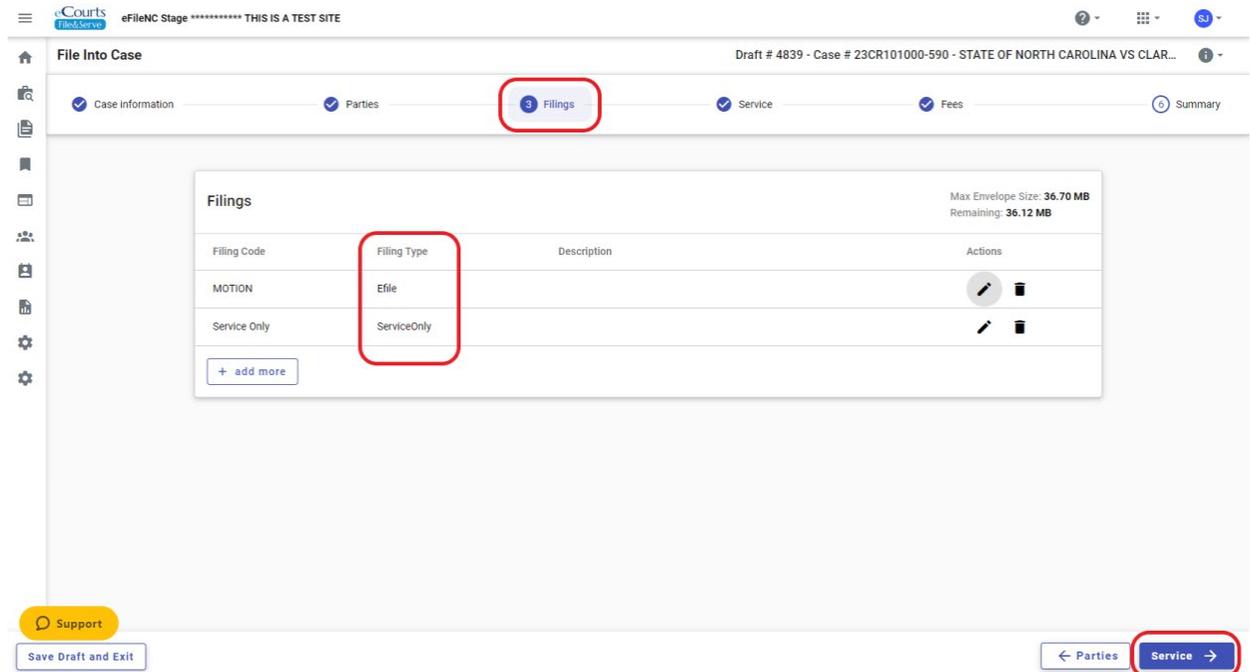


When a user performs the "eFile and eServe" and the "service only" function in the same envelope in OFS, the system will immediately: (1) send the eFile and eServe document(s) to the clerk for review, and (2) send an email notification of the service only document(s) to each Service Contact selected by the user in the service only filing that provides a link to the non-file-stamped document(s) and lists all Service Contacts that receive the notification. For the efiled and eServe only documents, after the clerk reviews and accepts the filing, the system will: (1) apply the file-stamp at the bottom of the lead page of each electronic file, (2) place the file-stamped document(s) into the official electronic court file, (3) send an email notification to the user that provides a link to the file-stamped document, and (4) send an email notification to each Service Contact selected by the user that provides a link to the file-stamped document and lists all Service Contacts that receive the notification. This occurs for both the eFile and eServe and service only documents. The system will not include in the official court record any information on service (e.g., list of Service Contacts and confirmation of service). Users have two options to obtain documentation of service and must file the documentation to include it in the official court record. First, the user can include their own email address as a Service Contact and receive the same email notification. Second, the OFS system records the transaction, and the user can print a copy of



that record at any time after the "service only" function has been completed. A user is not required to use the system generated documentation of service as their Certificate of Service and is always free to draft their own Certificate of Service and file it along with the corresponding document.

Example (ii) - Example of one document, with both eFile Only and Service Only selected; service immediately accomplished for all documents.



When a user performs the "eFile only" and the "service only" function in the same envelope in OFS, the system will immediately: (1) send the eFile only document(s) to the clerk for review and (2) send an email notification of the service only document(s) to each Service Contact selected by the user in the service only filing that provides a link to the non-file-stamped document(s) and lists all Service Contacts that receive the notification. For the efiled only documents, after the clerk reviews and accepts the filing, the system will: (1) apply the file-stamp at the bottom of the lead page of each electronic file, (2) place the file-stamped document(s) into the official electronic court file, and (3) send an email notification to the user that provides a link to the file-stamped document. The system will not include in the official court record any information on service (e.g., list of Service Contacts and confirmation of service). Users have two options to obtain documentation of service and must file the documentation to include it in the official court record. First, the user can include their own email address as a Service Contact and receive the same email notification. Second, the OFS system records the transaction, and the user can print a copy of that record at any time after the "service only" function has been completed.



Step 9 - On the **Filings** Tab continue adding more filings if needed and click on **Service** button to proceed.

The screenshot shows the 'File Into Case' interface for Draft # 4839 - Case # 23CR101000-590 - STATE OF NORTH CAROLINA VS CLAR... The 'Filings' tab is active, showing a table with one filing: MOTION, EfileAndServe. The 'Service' button at the bottom right is highlighted with a red box.

Step 10 - On the **Service** Tab select the Service Contacts you intend to serve. If the desired Service Contact is not listed, then you can choose to add them from the list your firm maintains by clicking on the **Firm List** button or create a new contact by clicking on the **Add new contact** button. You can also choose to add yourself as the service contact by clicking on the **Add me** button. After the service contact selections are made click the **Fees** button.

NOTE – NC is not maintaining a Public List of service contacts, so please do not add any service contact to this list.

The screenshot shows the 'Service' tab interface. Under 'Service Contacts', there are two sections: 'State OF NORTH CAROLINA' and 'Defendant CLARK KENT'. Each section has a table of contacts with checkboxes for selection. The 'Add me', 'Firm list', and 'Add new contact' buttons at the top are highlighted with red boxes. The 'Fees' button at the bottom right is also highlighted with a red box.



Option (a) - If adding yourself as the service contact, choose from the Associated Parties list to indicate the party you are associated with and click the **Save** button. If not associated with any party choose **Other: No Party Association**.

The screenshot shows the 'Add Me As Service Contact' form. The 'Associated Parties' dropdown is open, displaying the following options: 'Associated Parties', 'CLARK KENT', 'STATE OF NORTH CAROLINA', and 'Other: No Party Association'. The 'Save' button at the bottom right is circled in red.

Option (b) - If adding a firm user(s) as the service contact, choose from the Associated Parties list to indicate the party the firm user is associated with, select the firm user(s) and click the **Save** button. If not associated with any party choose **Other: No Party Association**.

The screenshot shows the 'Add Existing Firm Contact' form. The 'Associated Parties' dropdown is open, displaying the following options: 'Associated Parties', 'CLARK KENT', 'STATE OF NORTH CAROLINA', and 'Other: No Party Association'. Below the dropdown is a table of firm users with checkboxes. The 'Save' button at the bottom right is circled in red.

Associated Parties	Firm User	Email
Associated Parties	Test Attorney	Test.test@test.com
CLARK KENT	betty b betsy	betty@gmail.com
STATE OF NORTH CAROLINA	Betty B Betsy	Hitttheroadjack@gmail.com
Other: No Party Association	d blue	d_blue1023@hotmail.com
	Deidra T Blue	Deidra.T.Blue@nccourts.org



Option (c) - If adding a new service contact, choose from the Associated Parties list to indicate the party the contact is associated with, enter the contact's name and email and click the **Save** button. If not associated with any party, choose **Other: No Party Association**.

The screenshot shows the 'Add Service Contact' form in the 'File Into Case' section. The 'Service method' dropdown is set to 'EServe'. The 'Associated Parties' dropdown menu is open, with a red box highlighting the options: 'Associated Parties', 'CLARK KENT', 'STATE OF NORTH CAROLINA', and 'Other: No Party Association'. Below the dropdown are fields for 'Email', 'Phone number', 'Administrative email(s)', and 'Country' (set to 'United States'). A 'Support' button is visible on the left, and 'Cancel' and 'Save' buttons are at the bottom right.

The screenshot shows the 'Add Service Contact' form with 'CLARK KENT' selected in the 'Associated Parties' dropdown. The 'Contact Information' section is visible, with fields for 'First name' (Test), 'Middle name' (Service), 'Last name' (Contact), 'Email' (someemail@test.com), 'Phone number', 'Administrative email(s)', 'Country' (United States), 'Address Line 1', 'Address Line 2', 'City', 'State', and 'Zip Code'. A 'Support' button is on the left, and 'Cancel' and 'Save' buttons are at the bottom right, with the 'Save' button highlighted by a red box.



Step 11 - On the **Fees** Tab select the Payment Account, Party Responsible for Fees and Filing Attorney and click the **Summary** button.

The screenshot shows the 'File Into Case' interface for Draft # 4839 - Case # 23CR101000-590 - STATE OF NORTH CAROLINA VS CLAR... The breadcrumb trail indicates the current step is 'Fees'. The 'Fees' section contains the following fields:

- Payment Account:** Waiver
- Party Responsible for Fees:** CLARK KENT
- Filing Attorney:** Lawyer Lawson

The 'Fee Breakdown' section includes a 'Calculate fees' button. At the bottom of the interface, the 'Summary' button is highlighted with a red box, indicating the next step in the process.

.....Continued in next page.



Step 12 - On the **Summary** Tab check the three agreement boxes, verify all the details including the **Service Contact** details by clicking on the arrows next to each Party Type and click the **Submit** button.

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eFileNC Stage ***** THIS IS A TEST SITE

File Into Case Draft # 4839 - Case # 23CR101000-590 - STATE OF NORTH CAROLINA VS CLAR...

Case Information Parties Filings Service Fees Summary

*** Submission Agreements**

By checking this box, I agree that the information in this filing is true to the best of my knowledge, information, or belief. I also understand that persons who make false filings can be subject to legal penalties or sanctions and, depending on the situation, may be charged with a crime.

IMPORTANT NOTICE: It is prohibited for any person preparing or filing a document in the official records of the North Carolina courts to include any of the following personal identifying information (PII) in that document unless expressly required by law (e.g., the social security number of a party against whom a judgement for attorney's or GAL's fees has been entered under G.S. 7A-450.1, 7A-450.2, 7A-450.3, or 7A-455, which is expressly required to be on a fee application under G.S. 7A-455(d)) or court order or redacted: Social security numbers- Employer taxpayer identification numbers- Drivers' license numbers- State identification numbers- Passport numbers- Checking account numbers- Savings account numbers- Credit card numbers- Debit card numbers- Personal Identification (PIN) codes- Passwords Violation of this law may be prosecuted as an infraction, punishable by a fine of up to \$500.00 per violation. N.C.G.S. 132-1.10(d). https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/BySection/Chapter_132/GS_132-1.10.pdf

I have read this notice. I understand that, if I file, I must comply with the filing and redaction requirements set forth in N.C.G.S. 132-1.10(d).

You must accept the Submission Agreements.

Case Information [Edit](#)

Court Location ZTEST2 - Mecklenburg District Court	Case Type Criminal	Case Category Criminal
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Case Information [Edit](#)

Court Location ZTEST2 - Mecklenburg District Court	Case Type Criminal	Case Category Criminal
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Parties [Edit](#)

Party Type	Party Name	Lead Attorney
State	STATE OF NORTH CAROLINA	
Defendant	CLARK KENT	

Filings [Edit](#)

Filing Code	Filing Type	Filing Description	Client Ref #
MOTION	eFile and Serve		

Service Contacts [Edit](#)

Party Type	Party Name	Service Contacts
State	STATE OF NORTH CAROLINA	1
Service Contact	Service method	Email
Mickey Mouse	EServe	Mickey.Mouse@someemail.com
Defendant	CLARK KENT	2
Service Contact	Service method	Email
Jane Doe	EServe	testemail@email.com
Service Contact	Service method	Email
Donald Duck	EServe	testdemo@testdemo.com
Other Service Contacts		0

Fees [Edit](#)

Payment account	Party responsible	Filing attorney
Waiver	CLARK KENT	Lawyer Lawson

Total \$0.00
Waiver Selected

[Support](#)
[Save Draft and Exit](#)
[← Fees](#)
[Submit →](#)

