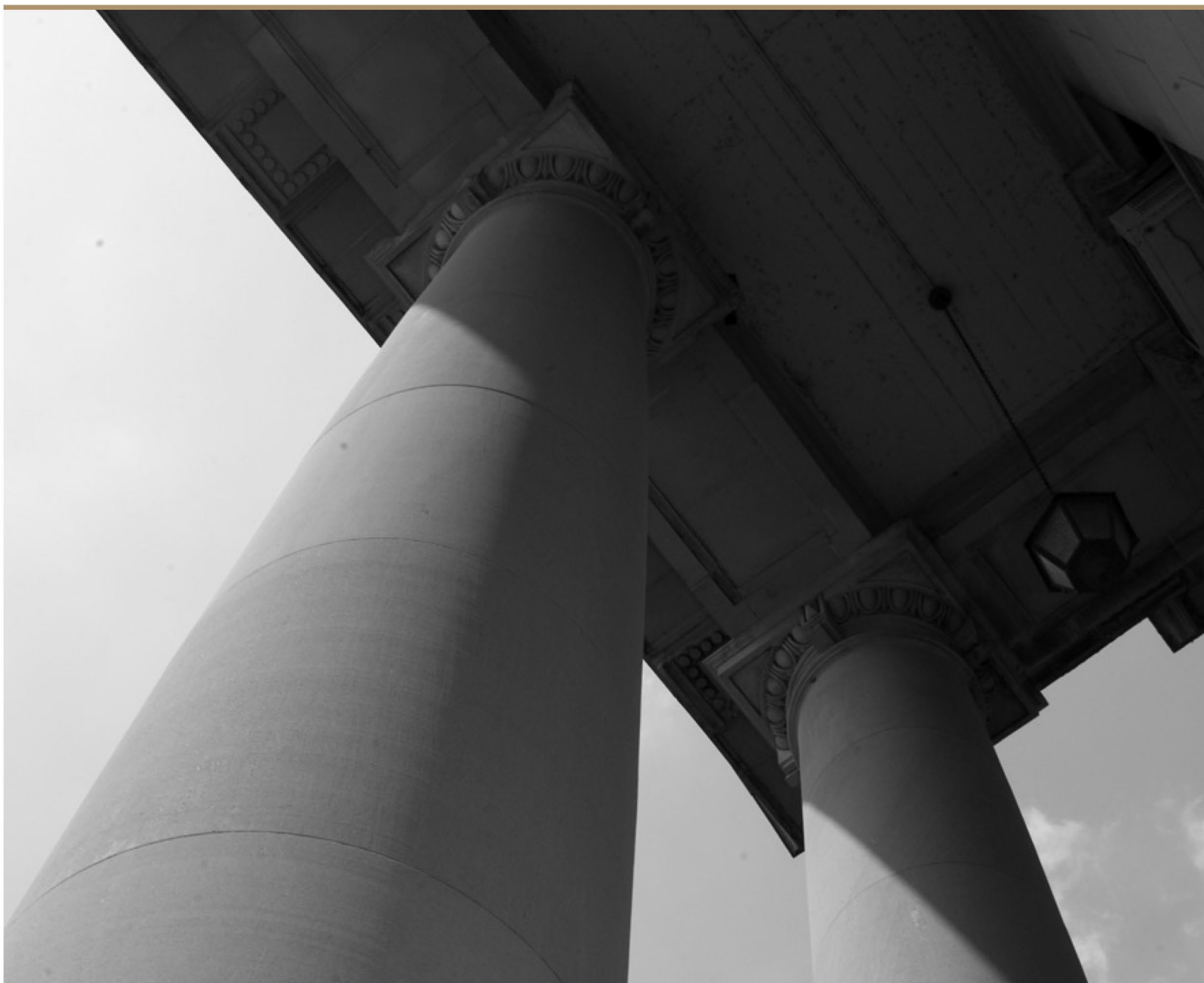




SERVICE OPTIONS IN FILE & SERVE



SERVICE OPTIONS IN FILE & SERVE

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

The screenshot shows the eCourts File & Serve dashboard. The top navigation bar includes the eCourts logo, the text 'eFileNC Stage ***** THIS IS A TEST SITE', and user information. A sidebar on the left contains various icons. The main content area is divided into several sections: 'Start filing' (with a 'Start filing' button highlighted by a red rectangle), 'Filing history' (listing cases and envelopes), 'Drafts' (listing drafts), 'Case search' (listing cases), 'Bookmarks' (listing bookmarks), and 'Templates' (listing templates). A yellow 'Support' button is located on the left side of the dashboard.

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

The screenshot shows the 'Start Filing' screen. It has a back arrow and the text 'Start Filing' at the top. The main content area is divided into two sections: 'File New Case' (with a 'Start new case' button) and 'File Into Existing Case' (with a 'File into existing case' button highlighted by a red rectangle). The 'File Into Existing Case' section includes a description: '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

Home

File & Serve

Calendar

Case Search

Case Details

Case History

Case Management

Case Settings

Case Tools

Case Reports

Case Analytics

Case Support

Support

eCourts
File & Serve

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

?

⌵

SU

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.		

Click here for the county identifier.

Click here for more case search tips.

* Case Number

Sort Results By
Newest to Oldest

Cancel

Search

The below case types will be converted from legacy

- Civil Magistrate CVM
- Civil Superior CVS

These legacy case types will be converted "as is" AND remain a one letter Case Type format in Odyssey.

- Civil Transcript "T"
- Miscellaneous Civil Judgments "M"
- Registration "R"
- Estates, etc. "E"



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

Case Search Results

Location: zTEST2 - Mecklenburg District Court Case Number: 23CR101000-590 1 Results

STATE OF NORTH CAROLINA VS CLARK KENT
Case # 23CR101000-590

Location	Case Category	Case Type
zTEST2 - Mecklenburg District Court	Criminal	Criminal

1 - 1 of

Actions

- File into case
- File into case with template
- View Service contacts
- Bookmark case

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

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

1 Case information 2 Parties 3 Filings 4 Service 5 Fees 6 Summary

Case information

Court Location
zTEST2 - Mecklenburg District Court

Case Category
Criminal

Case Type
Criminal

Support

Save Draft and Exit

Parties



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

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

Case information 2 Parties 3 Filings 4 Service 5 Fees 6 Summary

Parties

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

+ Add More

Support Save Draft and Exit Case Information **Filings**

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

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

Case information Parties 3 Filings 4 Service 5 Fees 6 Summary

Filings Max Envelope Size: 36.70 MB Remaining: 36.70 MB

Filing Code	Filing Type	Description	Actions
No Filings Added Yet At least one filing is required to complete the filing process. + Add filing			

Support Save Draft and Exit Parties **Service**



Step 8 - Provided below are the various service and efile 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 displays the 'Edit Filing Details' form in the eCourts eFileNC Stage interface. The 'Filing Type' section is highlighted with a red box, showing three radio button options: 'eFile Only', 'eFile and Serve' (which is selected), and 'Service Only'. Below this, the 'Filing Information' section contains several input fields: 'Filing Code' (with a dropdown arrow), 'Filing Description', 'Client Reference Number', and 'Comments to Court'. The top of the interface shows the case details: 'Draft # 4839 - Case # 23CR101000-590 - STATE OF NORTH CAROLINA VS CLAR...'. A 'Support' button is located at the bottom left, and 'Cancel' and 'Save' buttons are at the bottom right.

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' form in the eFileNC Stage interface. The 'Filing Type' section is highlighted with a red box, showing three options: 'eFile Only', 'eFile and Serve', and 'Service Only'. The 'Service Only' option is selected. Below this is the 'Filing Information' section with fields for 'Filing Code', 'Filing Description', 'Client Reference Number', and 'Comments to Court'. The 'Filing Code' dropdown is set to 'Service Only'. 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 'eCourts eFileNC Stage' interface. At the top, it says 'eFileNC Stage ***** THIS IS A TEST SITE'. The main heading is 'New Case Filing' with a 'Draft # 4845' on the right. Below this is a blue bar for 'Edit Filing Details'. The interface is divided into 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' (a dropdown), 'Filing Description', 'Client Reference Number', and '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 "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.

The screenshot shows the 'eFileNC Stage' interface for Draft # 4839 - Case # 23CR101000-590 - STATE OF NORTH CAROLINA VS CLAR... The 'Filings' tab is selected, and the 'Filing Type' dropdown is set to 'EfileAndServe'. The 'Service Only' checkbox is checked. The 'Max Envelope Size' is 36.70 MB, and 'Remaining' is 36.12 MB. The 'Service' button is highlighted.

Filing Code	Filing Type	Description	Actions
MOTION	EfileAndServe		
Service Only	ServiceOnly		

+ add more

Support Save Draft and Exit < Parties Service >

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.

The screenshot shows the 'eFileNC Stage' interface. The top navigation bar includes 'Case Information', 'Parties', 'Filings', 'Service', 'Fees', and 'Summary'. The 'Filings' tab is selected and highlighted with a red box. Below the navigation bar, there is a table with columns 'Filing Code', 'Filing Type', 'Description', and 'Actions'. The table contains two rows: 'MOTION' with 'Efile' and 'Service Only' as filing types, and 'Service Only' with 'ServiceOnly' as a filing type. The 'Filing Type' column is highlighted with a red box. At the bottom of the interface, there are buttons for 'Support', 'Save Draft and Exit', and 'Service'.

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.

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

Case Information Parties **Filings** Service Fees Summary

Filings Max Envelope Size: 36.70 MB Remaining: 36.41 MB

Filing Code	Filing Type	Description	Actions
MOTION	EfileAndServe		

+ add more

Support Save Draft and Exit

← Parties **Service** →

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.

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

Case Information Parties Filings **Service** Fees Summary

Service Contacts + Add me + Firm list + Public list + Add new contact

State STATE OF NORTH CAROLINA

Service Contact	Email/Mail	Service Method	Actions
☒ Mickey Mouse	Mickey.Mouse@someemail.com	EServe	

Defendant CLARK KENT

Service Contact	Email/Mail	Service Method	Actions
☒ Jane Doe	testemail@email.com	EServe	
☒ Donald Duck	testdemo@testdemo.com	EServe	

Support Save Draft and Exit

← Filings **Fees** →



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**.

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

Add Me As Service Contact

Associated Parties
Select one or more parties to associate with the service contact.

- * Associated Parties
- CLARK KENT
- STATE OF NORTH CAROLINA
- Other: No Party Association

Support Cancel Save

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**.

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

Add Existing Firm Contact

Associated Parties
Select one or more parties to associate with the service contact.

- * Associated Parties
- CLARK KENT
- STATE OF NORTH CAROLINA
- Other: No Party Association

Search

☐ Test Attorney	Test.test@test.com
☐ betty b betsy	betty@gmail.com
☐ Betty B Betsy	Hittheroadjack@gmail.com
☐ d blue	d_blue1023@hotmail.com
☐ Deidra T Blue	Deidra.T.Blue@nccourts.org

Support Cancel Save



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**.

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

Add Service Contact

Service method
Serve parties with an electronic copy of your documents or may also have the choice to serve them by mail.
* Service Method
EServe

Associated Parties
Select one or more parties to associate with the service contact.
* Associated Parties
CLARK KENT
STATE OF NORTH CAROLINA
Other: No Party Association

* Email
Phone number
Administrative email(s)
Country
United States

Support Cancel Save

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

Add Service Contact

Associated Parties
Select one or more parties to associate with the service contact.
* Associated Parties
CLARK KENT

Contact Information
Add your email address below to be eligible to receive electronic service.
* 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
Zip Code

Support Cancel Save



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

The screenshot displays the 'File Into Case' interface for Draft # 4839 - Case # 23CR101000-590 - STATE OF NORTH CAROLINA VS CLAR... The top navigation bar includes tabs for Case information, Parties, Filings, Service, Fees (selected), and Summary. The 'Fees' tab contains two main sections: 'Fees' and 'Fee Breakdown'. The 'Fees' section prompts the user to select a payment account, showing a dropdown menu with 'Waiver' selected, and an option to 'Add payment account'. Below this, the 'Party Responsible for Fees' is set to 'CLARK KENT', and the 'Filing Attorney' is set to 'Lawyer Lawson'. The 'Fee Breakdown' section instructs the user to click 'Calculate fees' after selecting a payment account. At the bottom, there are buttons for 'Support', 'Save Draft and Exit', 'Service', and 'Summary' (highlighted with a red box).

.....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.

File Into Case

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

Case InformationPartiesFilingsServiceFeesSummary

*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

Court Location

zTEST2 - Mecklenburg District Court

Case Type

Criminal

Case Category

Criminal

Edit

Case Information

Court Location

zTEST2 - Mecklenburg District Court

Case Type

Criminal

Case Category

Criminal

Edit

Parties

Party Type

Party Name

Lead Attorney

State

STATE OF NORTH CAROLINA

Defendant

CLARK KENT

Edit

Filings

Filing Code

Filing Type

Filing Description

Client Ref #

MOTION

eFile and Serve

Edit

Service Contacts

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

Payment account

Party responsible

Filing attorney

Waiver

CLARK KENT

Lawyer Lawson

Total

\$0.00

Waiver Selected

Edit

Support

Save Draft and Exit

← Fees

Submit →

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