



How to Register as an Attorney in Odyssey File and Serve (“OFS”)

March 2021

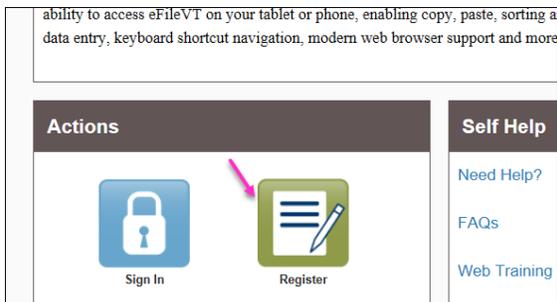
Attorneys should set up a Firm Account even if operating as a sole practitioner. A Firm account has a Firm Administrator(s) and can invite other attorneys to join the firm through a link provided in the registration. (See *Invite Attorney User to Create an Account under your Firm* section below, found [here](#)).

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Create Account

1. Go to OFS site: <https://vermont.tylerhost.net/ofsw eb>
2. Click Register



3. Enter Name for account, etc in the below screen

Tyler Technologies
eFileVT File & Serve

Register

User Information > Firm Information > Terms and Conditions > Complete

First Name	Middle	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email Address	Password	
<input type="text"/>	<input type="text"/>	
Security Question		
<input type="text"/>		
Security Answer		
<input type="text"/>		

Enter a simple question that can only be answered by you. Example: High School Mascot

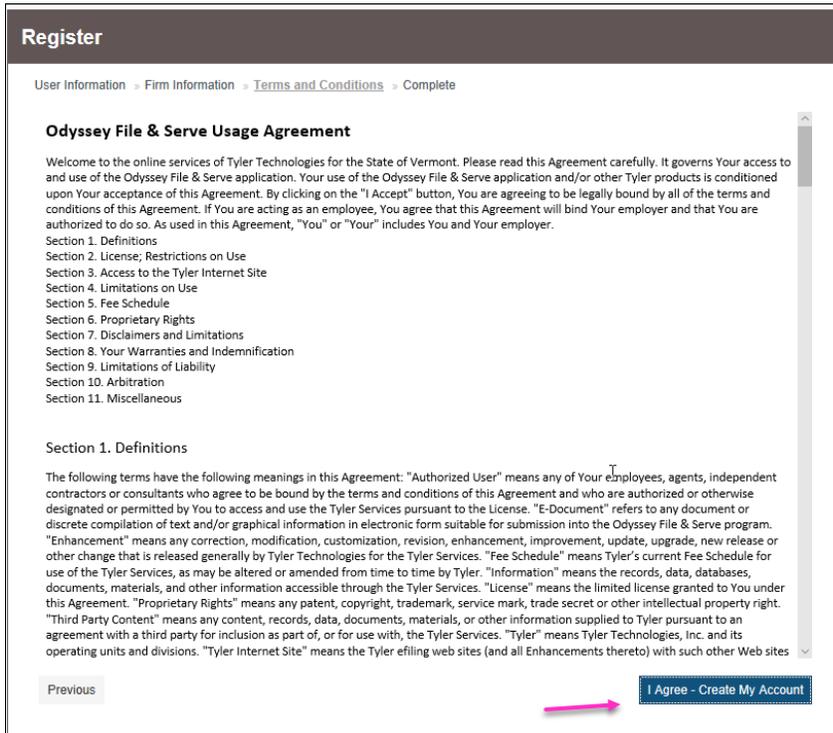
4. Select option for firm account

The screenshot shows the 'Register' page with a dark header. Below the header is a breadcrumb trail: 'User Information > Firm Information > Terms and Conditions > Complete'. The main content area is titled 'Registration Options' and contains two side-by-side boxes. The left box is titled 'Register for a Firm Account' and lists 'Perfect for:' with three bullet points: '- Attorneys', '- Firms with multiple filers', and '- Solo Attorney Practitioners'. The right box is titled 'Register for a Self-Represented Account' and lists 'Perfect for:' with three bullet points: '- Pro Se Filers', '- Process Servers', and '- Landlords / Tenants'. Both boxes have a radio button at the bottom right. At the bottom of the page are 'Previous' and 'Next' buttons.

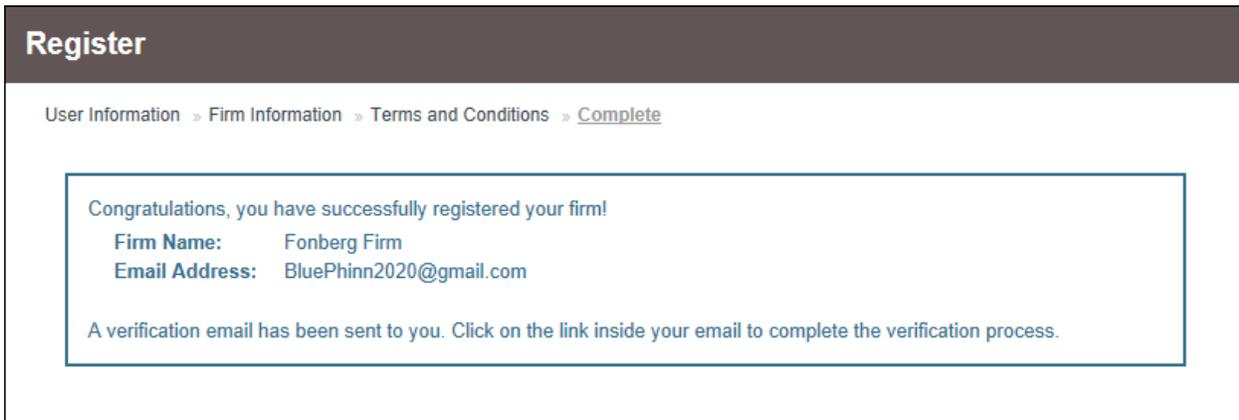
5. Enter the information in the open screen

This screenshot shows the 'Register' page with the 'Firm Information' section expanded. The breadcrumb trail is 'User Information > Firm Information > Terms and Conditions > Complete'. The 'Registration Options' section is still visible. A red-bordered warning box states: 'Before you register for a Firm Account, please check with your firm to ensure an account has not already been created. If your firm has already been created, please ask your firm administrator to invite you to join the firm.' Below this, the 'Firm Information' section includes: 'Name' (Fonberg Firm), 'Country' (United States of America), 'Address Line 1' (112 Main St.), 'City' (Barre), 'State' (Vermont), 'Zip Code' (05641), and 'Phone Number' (redacted). At the bottom, there is a checkbox labeled 'Require administrator approval of new user registration' which is checked.

6. Filer reviews Usage Agreement and clicks "I Agree – Create My Account"



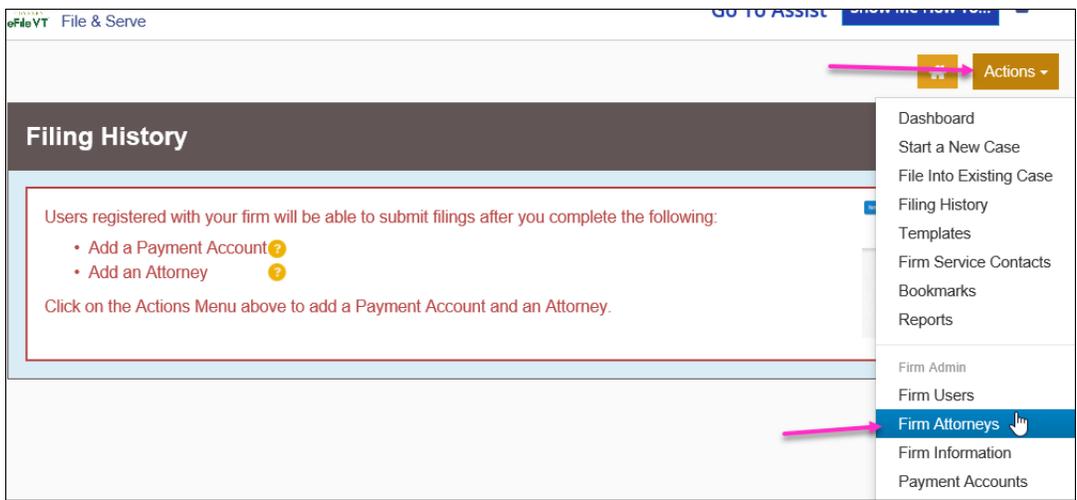
7. Verification email is sent to the email account



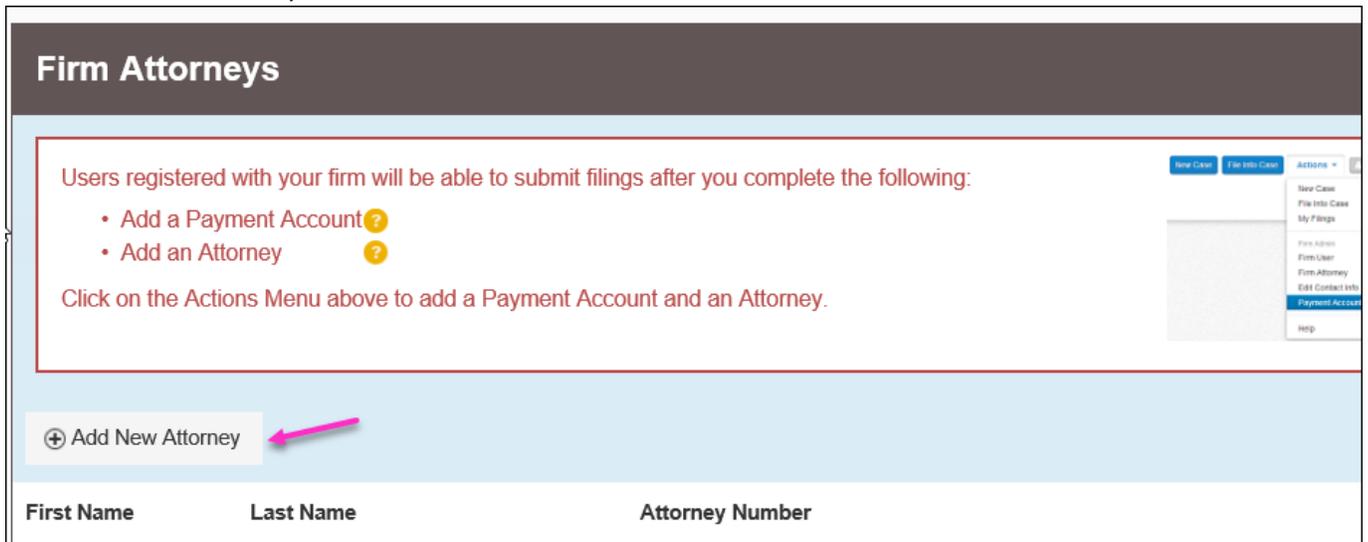
8. Go to email account
9. Click link in email to Activate Account
10. Takes you back to the internet browser
11. User needs to add any other Attorney Users and a Payment Account before e-filing the first time

Add an attorney

1. Click Actions
2. Click Firm Attorneys



3. Click "Add New Attorney"



4. Enter Attorney Number, and all other relevant attorney information

A screenshot of a form for adding an attorney. At the top, there is a pagination control showing '0' items per page and '10' items per page, with the text 'No items to display' on the right. Below this is the 'Attorney Number' field, which is highlighted with a pink arrow. To the right of the field is a 'Verify' button. Below the 'Attorney Number' field are three input fields for 'First Name', 'Middle Name', and 'Last Name'. A red note above the 'Attorney Number' field says 'Attorney number = Bar Number'.

5. Can enter Attorney Number, click Verify to confirm you have entered the correct number

A close-up screenshot of the 'Verify' button on the attorney information form. The button is dark blue with the word 'Verify' in white text. A pink arrow points to the button. To the left of the button is an information icon (a lowercase 'i' in a circle).

6. Click Save Changes in the bottom right

A screenshot of a web form. At the top, there is a label 'Last Name' above a text input field containing the text 'Fonber'. To the right of the input field is a small 'X' icon. Below the input field, there are two buttons: 'Undo' and 'Save Changes'. A pink arrow points from the 'Save Changes' button towards the 'Last Name' input field.

Add a payment account

1. Click Actions
2. Click Payment Accounts

A screenshot of the 'Firm Attorneys' page. The page title is 'Firm Attorneys'. Below the title, there is a message: 'Users registered with your firm will be able to submit filings after you complete the following: • Add a Payment Account'. Below this message is a button 'Add New Attorney'. A table lists attorneys with columns 'First Name', 'Last Name', and 'Attorney Number'. The first row shows 'Chasity' and 'Fonberg' with attorney number '4682'. At the bottom of the table, it says '10 items per page'. On the right side, there is an 'Actions' dropdown menu. The menu is open, showing options: Dashboard, Start a New Case, File Into Existing Case, Filing History, Templates, Firm Service Contacts, Bookmarks, Reports, Firm Admin, Firm Users, Firm Attorneys, Firm Information, Payment Accounts (highlighted with a pink arrow), and Help.

3. Click "Add Payment Account" *User can have multiple accounts if necessary*

A screenshot of the 'Add Payment Account' section. It shows the same message as the previous screenshot: 'Users registered with your firm will be able to submit filings after you complete the following: • Add a Payment Account'. Below this message is a button 'Add Payment Account' with a pink arrow pointing to it. Below the button is a table with columns 'Payment Account Name', 'Payment Account Type', and 'Active'. The table is currently empty.

5. Enter Payment Account Name, and all other relevant information

A screenshot of a web form with a light blue background. At the top right, it says "No items to display". Below that, there are two sections: "Payment Account Name" with an empty text input field, and "Payment Account Type" with a dropdown menu showing "Click to select Payment Account Type".

A screenshot of the same form as above, but with "Visa" entered in the "Payment Account Name" field and "Credit Card" selected in the "Payment Account Type" dropdown. To the right of the dropdown is a blue button labeled "Enter Account Information". At the bottom right, there are two buttons: "Undo" and "Save Changes".

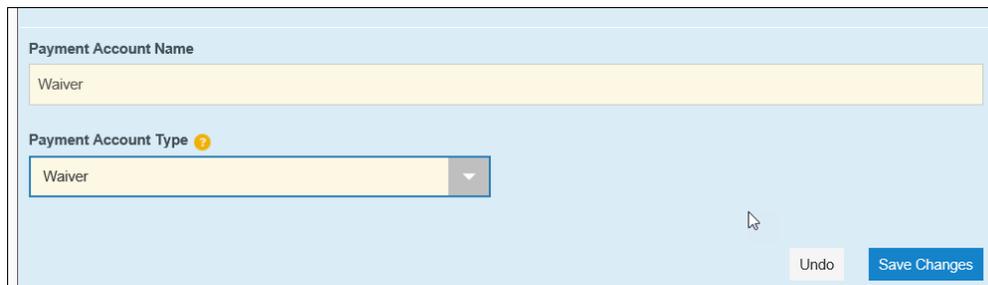
A screenshot of a dark grey header titled "Enter Account Information". Below the header is a white section titled "Method of Payment" containing two radio button options: "Credit Card" and "e-Check".

6. User enters all credit card information

A screenshot of a form titled "Cardholder Information". Below the title is a note: "Enter the information as it appears on the Cardholder Account. The fields marked with a red asterisk (*) are required fields." The form contains several input fields: "Card Type" (dropdown), "Card Number" (text), "Exp Month" (MM) and "Exp Year" (YYYY) (text), "CVV Code" (text) with a "CVV Help" link, "Name on Card" (text) with a "Maximum of 30 characters" note, "Address Type" (radio buttons for "US" and "Foreign"), "Address Line 1" (text) with a "Street address, P.O. box, company name, c/o" note, "Address Line 2" (text) with an "Apartment, suite, unit, building, floor, etc." note, and "City" (text).

Waiver Account

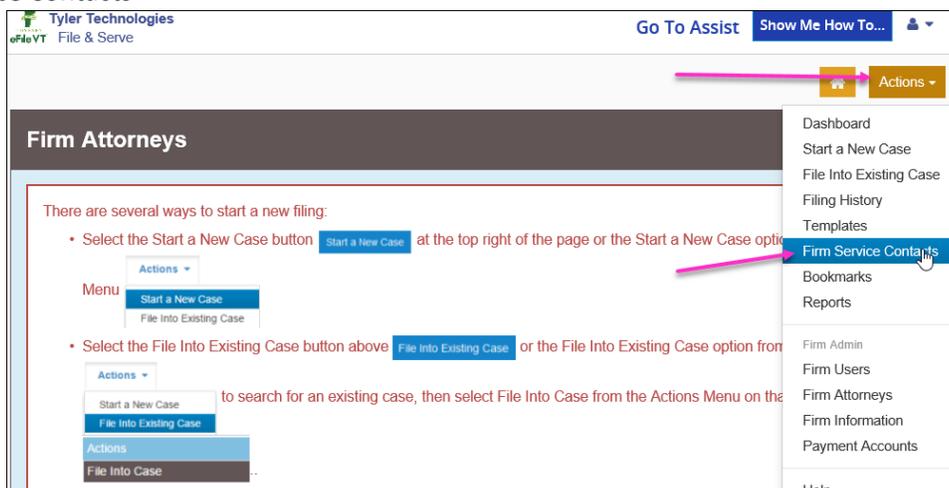
1. User can add a Waiver account for either criminal cases, stalking, RFA, or if state agency filer:
 - a. Click Actions
 - b. Click Payment Accounts
 - c. Click "Add Payment Account"
 - d. Follow steps to complete



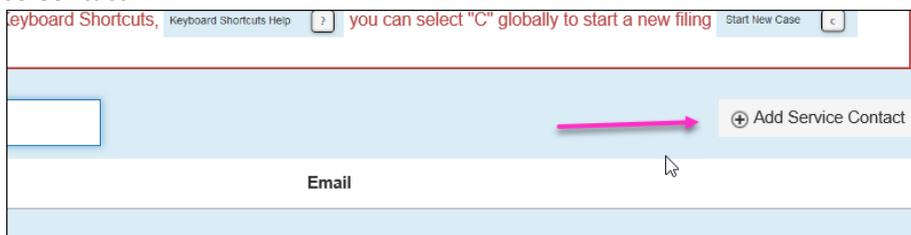
The screenshot shows a form with two input fields. The first field, labeled "Payment Account Name", contains the text "Waiver". The second field, labeled "Payment Account Type", also contains "Waiver" and has a dropdown arrow on the right. At the bottom right of the form, there are two buttons: "Undo" and "Save Changes".

Add a service contact to the Public List

1. Click Actions
2. Click Firm Service Contacts



3. Click "Add Service Contact"



4. Enter the Attorney's information for service contact
5. Enter the Email Address for the Attorney
6. User can add additional admin email addresses under "Administrative Copy" for those other persons to receive copies of served documents

BluePhinn2020@gmail.com Actions ▾

1 - 0 of 0 items

First Name Chas	Middle Name 	Last Name Fonberg
Firm Name Fonberg Firm	Email BluePhinn2020@gmail.com	Administrative Copy admin@gmail.com
Country United States of America	Any eservice emails will go to the email and the admin copy email	
Address Line 1 112 Main St.	Address Line 2 	City Barre
State Vermont		
Zip Code 05641	Phone Number 	
<input checked="" type="checkbox"/> Make This Contact Public	Checking this box adds the service contact emails to the public list for opposing counsel to choose from	

7. Click Save Changes, bottom right

To assign different roles for users

1. Click Actions
2. Click Firm Users

Tyler Technologies Go To Assist Show Me How To...

File & Serve Home Actions ▾

Firm Users

There are several ways to start a new filing:

- Select the Start a New Case button [Start a New Case](#) at the top right of the page or the Start a New Case option from the Actions menu.
- Select the File Into Existing Case button above [File Into Existing Case](#) or the File Into Existing Case option from the Actions menu to search for an existing case, then select File Into Case from the Actions Menu on the page.

- Dashboard
- Start a New Case
- File Into Existing Case
- Filing History
- Templates
- Firm Service Contacts
- Bookmarks
- Reports
- Firm Admin
- Firm Users**
- Firm Attorneys
- Firm Information
- Payment Accounts

3. Click on name to expand the screen

First Name	Last Name	Email	Firm Status	Email Status	Roles
Chas	Fonberg	BluePhinn2020...	Approved	Active	Filer, Firm Admin

1 10 items per page

Join My Firm: <https://vermont-stage.tylerhost.net/OfsWeb/UserModule/Registration?firm=dd8adb6c-6>

4. User can then check off the applicable Roles needed for the User

The screenshot shows a user profile form for 'Chas Fonberg'. The form includes fields for First Name, Middle Name, Last Name, and Email. Under the 'Roles' section, three roles are listed: 'Firm Admin', 'Filer', and 'Attorney', each with a checked checkbox. A pink arrow points to the 'Filer' checkbox with the text 'Check applicable Roles'. Below the roles is an 'Attorney Number' field with a redacted value and a 'Verify' button. At the bottom right, there are 'Undo' and 'Save Changes' buttons. A 'Join My Firm' field contains a URL.

5. If an attorney and attorney box is checked, must enter the Attorney Number (aka Bar Number) and click "Verify" to make sure it is the correct number:

This screenshot shows the same user profile form as above, but with a 'Verify Attorney Number' dialog box open. The dialog box contains the following information:

Attorney Name	Attorney Number
Chasity Stoots-Fonberg	[Redacted]

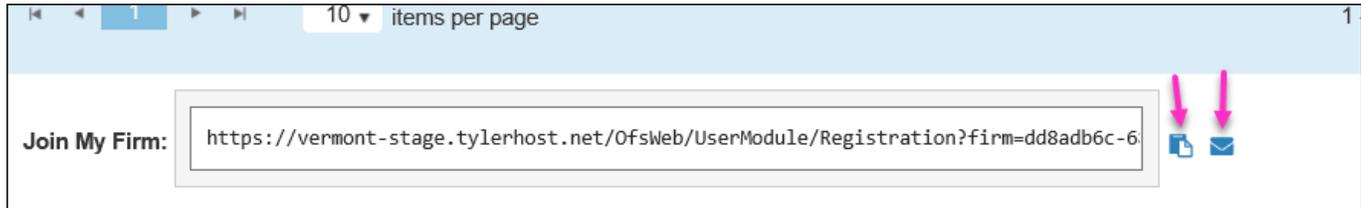
Below the table, the dialog box contains the text: "If this is not the attorney name you expected, make sure you entered the correct attorney number or contact the court to verify the attorney number." and a 'Close' button. In the background, the 'Attorney Number' field now contains the value '4682' and the 'Verify' button is being clicked by the mouse.

6. Save Changes

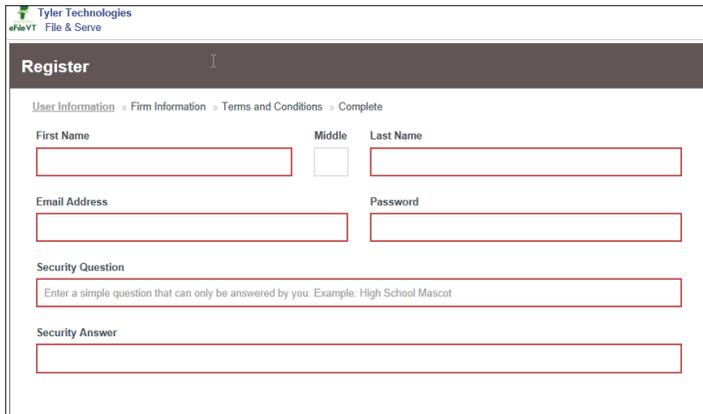
Invite Attorney User to Create an Account under your Firm

The Firm Administrator is responsible for inviting firm users to create an account and join the firm. To invite firm users to create an account and join the firm, perform the following:

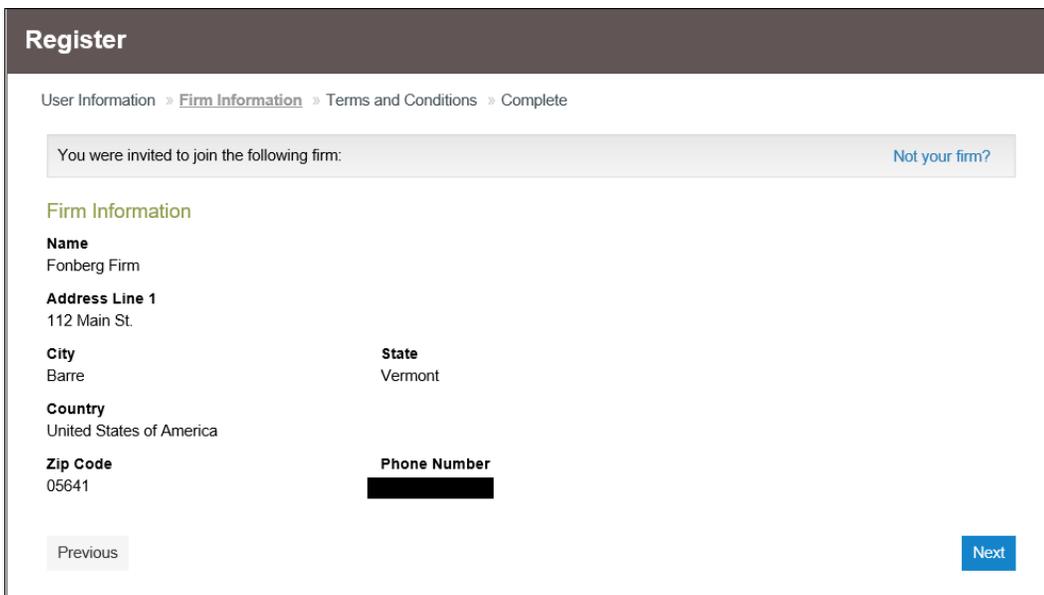
1. Click Actions
2. Click Firm Users
3. Scroll to bottom where it shows "Join My Firm" and the link.
4. There is a copy link button and an email button to share the link to join the firm



5. Attorney receives link to join the firm
6. Attorney clicks link in email
7. Screen opens for new attorney user to complete:

A screenshot of a 'Register' form. The form is titled 'Register' and has a breadcrumb trail: 'User Information > Firm Information > Terms and Conditions > Complete'. The form contains several input fields: 'First Name', 'Middle', and 'Last Name' (with a dropdown arrow); 'Email Address' and 'Password'; 'Security Question' (with a placeholder text: 'Enter a simple question that can only be answered by you. Example: High School Mascot'); and 'Security Answer'.

8. Firm Information automatically populates

A screenshot of the 'Register' form, showing the 'Firm Information' section. The breadcrumb trail is 'User Information > Firm Information > Terms and Conditions > Complete'. A message states: 'You were invited to join the following firm:'. Below this, the firm information is pre-populated: 'Name: Fonberg Firm', 'Address Line 1: 112 Main St.', 'City: Barre', 'State: Vermont', 'Country: United States of America', 'Zip Code: 05641', and 'Phone Number' (blacked out). There are 'Previous' and 'Next' buttons at the bottom.

9. User agrees and creates account

Register

User Information » Firm Information » Terms and Conditions » Complete

Odyssey File & Serve Usage Agreement

Welcome to the online services of Tyler Technologies for the State of Vermont. Please read this Agreement carefully. It governs Your access to and use of the Odyssey File & Serve application. Your use of the Odyssey File & Serve application and/or other Tyler products is conditioned upon Your acceptance of this Agreement. By clicking on the "I Accept" button, You are agreeing to be legally bound by all of the terms and conditions of this Agreement. If You are acting as an employee, You agree that this Agreement will bind Your employer and that You are authorized to do so. As used in this Agreement, "You" or "Your" includes You and Your employer.

Section 1. Definitions
Section 2. License; Restrictions on Use
Section 3. Access to the Tyler Internet Site
Section 4. Limitations on Use
Section 5. Fee Schedule
Section 6. Proprietary Rights
Section 7. Disclaimers and Limitations
Section 8. Your Warranties and Indemnification
Section 9. Limitations of Liability
Section 10. Arbitration
Section 11. Miscellaneous

Section 1. Definitions

The following terms have the following meanings in this Agreement: "Authorized User" means any of Your employees, agents, independent

[Previous](#) [I Agree - Create My Account](#)

10. Filer has now joined the Firm and must go to email to complete the verification process:

Register

User Information » Firm Information » Terms and Conditions » Complete

Congratulations, you have successfully joined your firm!

Firm Name: Fonberg Firm
Email Address: doby4060@gmail.com

A verification email has been sent to you. Click on the link inside your email to complete the verification process.

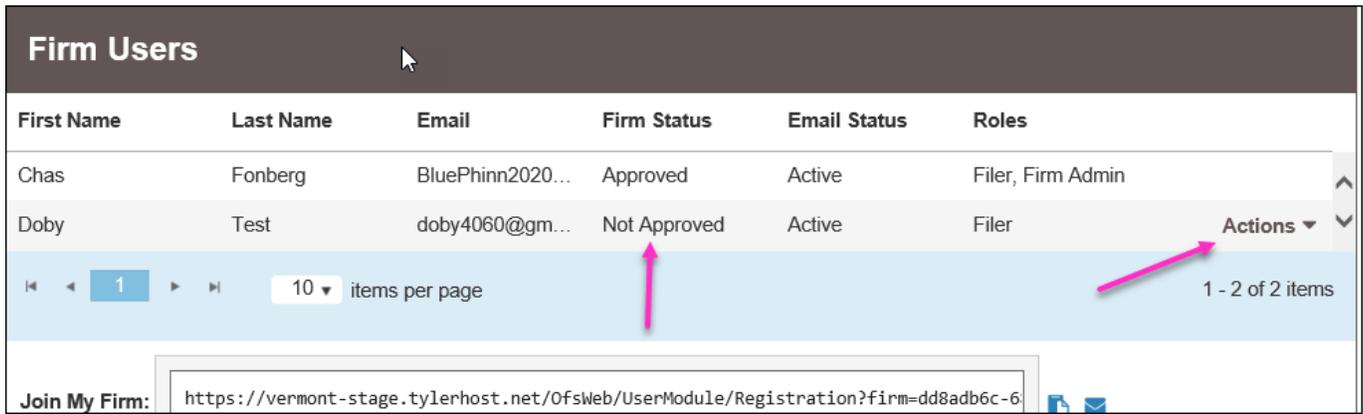
11. User must contact one of the firm administrators to authorize them:

Firm Administrator Approval Required

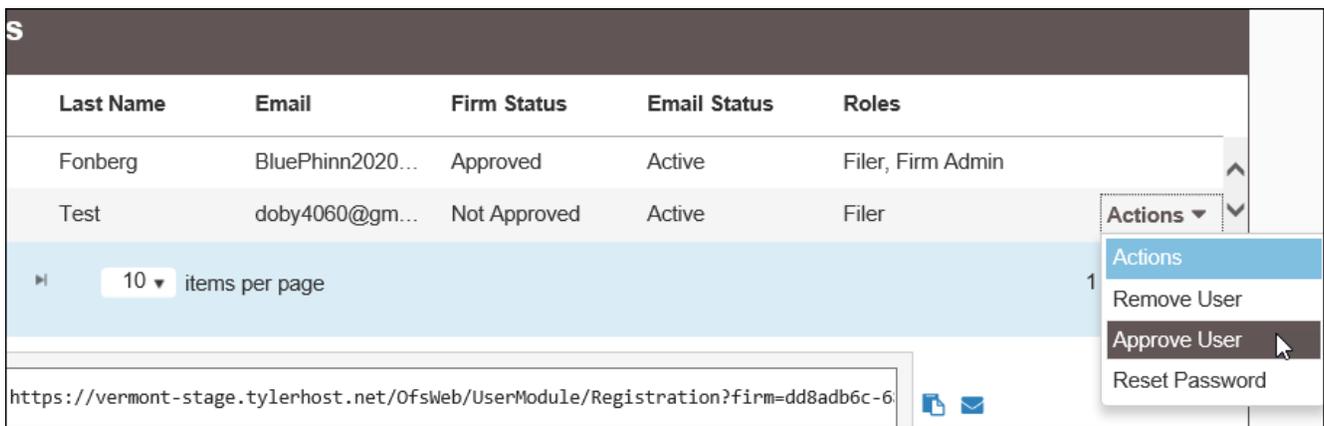
Please contact one of your firm administrators (listed below) and ask them to authorize you. Until the firm administrator grants you authorization to join the firm, you will be unable to process any filings or view any existing filings.

Firm Administrators	
Name	Email
Chas Fonberg	bluephinn2020@gmail.com

12. **Firm Administrator** logs into the account, clicks actions, firm users, to approve the new attorney:



13. Click Actions, Approve User:



14. Firm Administrator then clicks the attorney's name, which expands screen to assign Roles.

- Firm Administrator will need to assign "Attorney" role if user is an attorney, and then enter attorney's bar number:

10 items per page 1 - 2 of 2 items

First Name: Doby Middle Name: Last Name: Test

Email: doby4060@gmail.com

Roles:
 Firm Admin Filer
 Attorney

Attorney Number: Verify

Undo Save Changes