

How to e-File

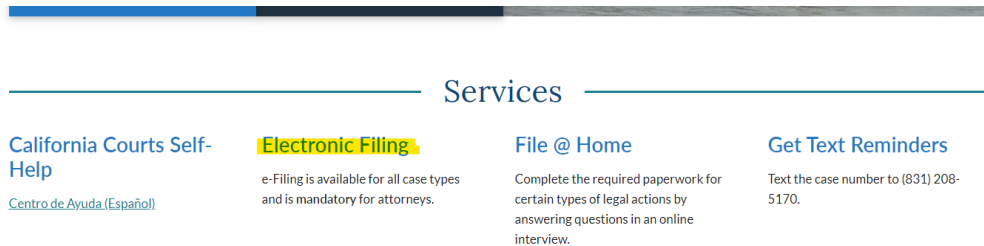
A step by step guide from the Santa Cruz Self Help Center and Law Library on how to register and initiate a new case or submit a subsequent filing into an existing case through e-file.

This document provides step by step directions on how to e-file your documents once you have prepared them. If you used Guide and File to prepare your documents, and saved them to your computer, follow these steps to file your documents with the court. You will not need to set up a new account, you can use your Guide and File login information to sign into the e-file site and skip to step 16. The screen shots in this document are for Odyssey eFile CA.

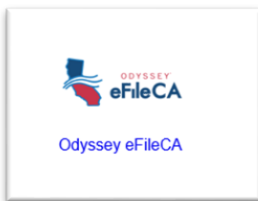
Setting up an e-File Account

If you already have an account set up, login to your e-file account and skip to step 13.

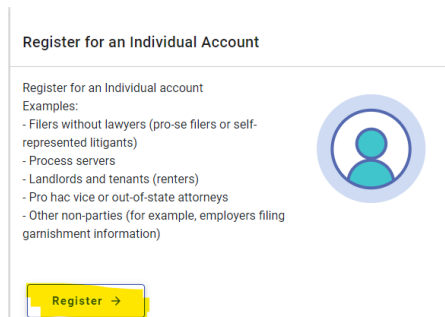
1. Visit the court's website at www.santacruz.courts.ca.gov
2. On the home page in the middle under Services select "Electronic Filing"



3. You are taken to the Electronic Filing screen, under getting started select the link to the list of e-filing Service Providers (EFSP)
4. You are redirected to the Odyssey eFileCA web page. Select any one of the many service providers available. The screen shots in this document are for Odyssey eFile CA. Once you register for one service provider your login information can be used for any of the other providers.



5. Select Register under "Register for an Individual Account"



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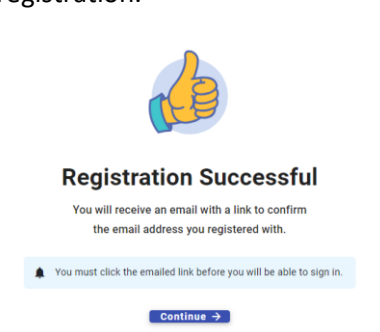
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6. Fill in all the required areas outlined in red, then select Register in the bottom right corner.

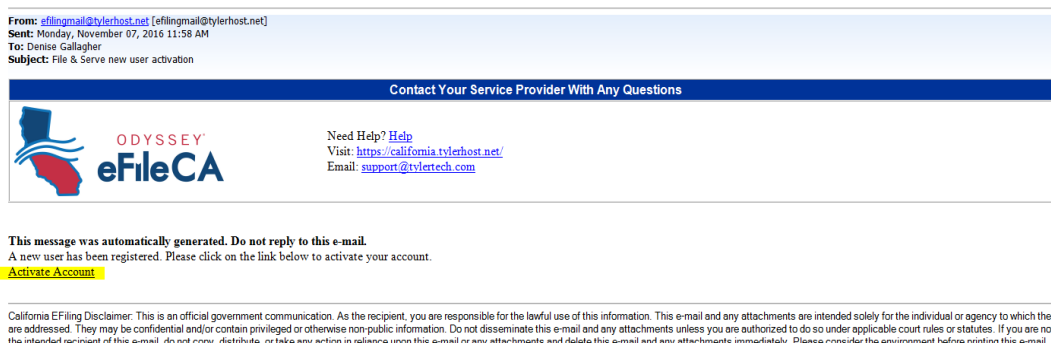
The image shows a registration form with the following sections and fields:

- Account Credentials**
 - * Email Address (red outline, required)
 - Email Address is Required.
 - * Password (red outline, required)
 - Password is Required.
- User Information**
 - * First Name (red outline, required)
 - First Name is Required.
 - Middle Name (white outline)
 - * Last Name (red outline, required)
 - Last Name is Required.

7. You will receive notification that your registration was successful and to check your email to complete registration.



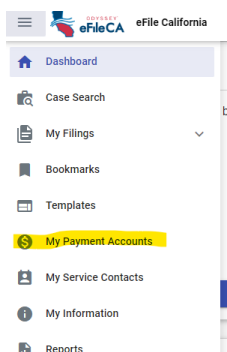
8. An email will be sent to you to confirm and complete setting up your account. Go to your email and open the email from efilingmail@tylerhost.net. If you don't see the email check your spam folder. Once you open the email select Activate Account.



9. Sign into your e-file account
10. Before you can e-file you must set up a payment account. From your Dashboard, select the drop down in the upper left corner and pick My Payment Accounts from the drop-down list.

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11. Select “+ Add account” in the upper right corner

If you have a fee waiver, or will be filing one with the court, select Waiver as the type. If you do not have a fee waiver, you’ll need to add a credit card or Bank Account.

- a. Payment Account Name – this is for you to name the payment account; it can be whatever you want to use that will help you remember which account this is coming from. (i.e. Bank of America checking account; Chase credit card; Fee Waiver; etc)
- b. Select “Enter Information” or “Save” once you’ve entered the account name and payment type.

A screenshot of the 'Add Payment Account' form. It has a blue header with the title 'Add Payment Account' and a close button. There are two input fields: the first is labeled '* Account Name' and has a red border with the error message 'Account Name is Required.' below it; the second is a dropdown menu labeled '* Payment Type:' with 'Select...' and a red border with the error message 'Payment Type: is Required.' below it. A 'Cancel' button is at the bottom right.

If you are adding a bank account or credit card, a new window will open to enter payment information, fill in the required information then hit continue.

12. Once you save the payment information your account is all set up and ready to e-file.

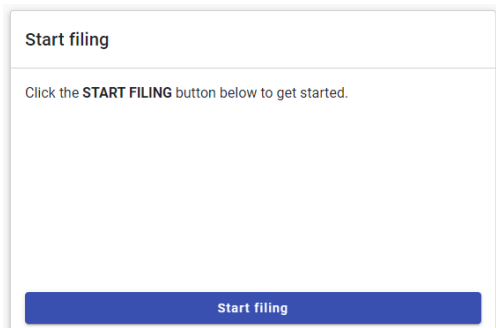
Initiating a New Case in e-File

These directions are for opening a new case through e-file (you DO NOT have a case number). The screen shots and information are for filing through Odyssey e-File CA. If you have a case number skip to step 24.

13. Login to your e-file account, you should be on the home screen called the “Dashboard”. From here select the blue button “Start Filing”

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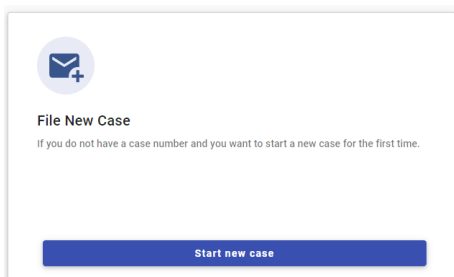


Start filing

Click the **START FILING** button below to get started.

Start filing

14. Under File a New Case click on “Start new case”, reminder this means you DO NOT have a case number.



File New Case

If you do not have a case number and you want to start a new case for the first time.

Start new case

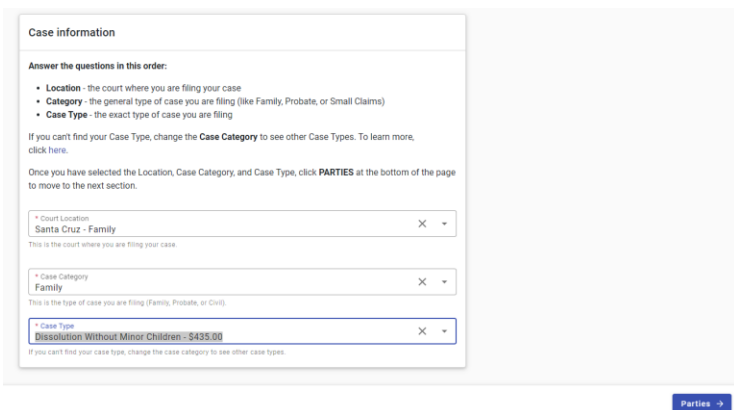
15. Select the filing location

- a. Select the location for your filing, from the drop-down list. You’ll want one of the Santa Cruz options.
 - i. Santa Cruz – Appeals
 - ii. Santa Cruz – Civil
 - iii. Santa Cruz – Family
 - iv. Santa Cruz – Small Claims
 - v. Santa Cruz – Probate

16. Select the Case Category for your case

17. Select the Case Type that best describes your filing.

18. Select the blue “Parties” button when done



Case information

Answer the questions in this order:

- **Location** - the court where you are filing your case
- **Category** - the general type of case you are filing (like Family, Probate, or Small Claims)
- **Case Type** - the exact type of case you are filing

If you can't find your Case Type, change the **Case Category** to see other Case Types. To learn more, click here.

Once you have selected the Location, Case Category, and Case Type, click **PARTIES** at the bottom of the page to move to the next section.

* Court Location
Santa Cruz - Family X

This is the court where you are filing your case.

* Case Category
Family X

This is the type of case you are filing (Family, Probate, or Civil).

* Case Type
Dissolution Without Minor Children - \$435.00 X

If you can't find your case type, change the case category to see other case types.

Parties →

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19. You are moved to the Party Information section where you will add the names of the parties on this case. Most cases will require at least two parties. The red triangle indicates the party type is required.
 - a. Select the “+ Add party” details to add the party information
 - b. Fill in the required areas outlined in red, first and last name, along with any other information you can supply such as address and date of birth.
 - c. Select the blue “Save” button at the bottom when done

Party information
Enter the name(s) of the people or entities involved in the case.

Party Type
Respondent

Enter the name(s) of the people or entities involved in the case. If you are filing into a case that has already been started, the parties may already be filled in.

* Plaintiff/Petitioner/Applicant means someone who wants to start a case. Defendant/Respondent is who the case is filed against.
* To move between parties, click the party or click the pencil button to the right.
* Click “I AM THIS PARTY” to pull information from your profile.
* “Entity” means a business, agency, department, etc. To add an Entity, click the circle next to the word “Entity.”
* To add more parties, click the **ADD PARTY** button.
* If you want to change information for a party already on the case, please contact the court.

Person Entity I Am This Party

* First Name Middle Name * Last Name Suffix Select...

First Name is Required. Last Name is Required.

Date of Birth Party CMS ID Interpreter Select...

- a. Continue until you have added all parties for the case.
- b. Select the blue “Filings” button in the bottom right corner.

20. You are moved the “Filings” section. Here you will identify what it is you are filing and attach the documents.
 - a. Select the blue “+ Add filing” button in the middle of the screen
 - b. From the drop-down menu under Filing Code, find the description that best matches the name of the document you are filing. Since you are opening a new case, you are most likely filing a Petition or Complaint along with a Summons and maybe some additional documents.

eFile Only eFile and Serve
Pick “eFile Only” to just electronically file your papers. Electronically file your papers with the court and have your documents sent to the selected service contacts.

Filing Information

* Filing Code Filing Code is Required.

Filing Description

Client Reference Number

Comments to Court

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- c. You can leave the other fields blank and scroll down to where it says Upload Documents. Drag your PDF document to the box or hit “select file” to locate the PDF document on your computer to upload it.

Upload Documents
To add more than one lead document to the filing, create another filing and upload your document.

* Lead Document (Required)

Drag files here or

Select file

Maximum file size: 36.70 MB
Accepted file types: Portable Document File (PDF)

- d. Select Save in the bottom right
- e. If you have additional filings select “+ add more” if you are done select “Skip to fees” in the bottom right corner.

21. Select your payment account from the drop down. If you are submitting a fee waiver with your filing you should have set up a payment account type for Wavier, if you did not, return to items 11-12 for directions on how to do this. Select your name as the Party Responsible for the Fees, even if the fees are being waived. When you’re done, Select the blue “Summary” button in the bottom right corner.

Fees
You must select a payment account even if there are no fees.

* Payment Account
Waiver

+ Add payment account

* Party Responsible for Fees
bob smith

Fee Breakdown
Once you've picked your payment account, click the button below to see the total fees.

Calculate fees

← Service Summary →

22. You are now looking at a summary of your filing, scroll through and review the information. When you’re ready, select the “Submit” button on the right side of the screen.

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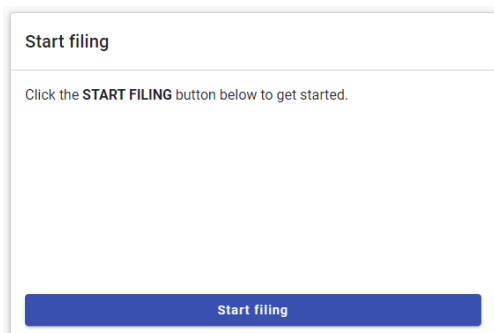
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23. Once your filing has been submitted you should receive an email confirmation. After the court has reviewed your filing, allow 24 hours for processing, you will receive another email telling you if your filing was accepted or if it was rejected for problems that need to be corrected. If your filing is rejected there should be an explanation as to why, if you have any questions you can contact the clerk's office or Self Help Center.
24. Once your filing has been accepted, there will be file stamped copies in the acceptance email. You can also obtain them by logging on to your e-file account. You will now need to serve the other side. For assistance on how to complete service contact the Self Help Center.

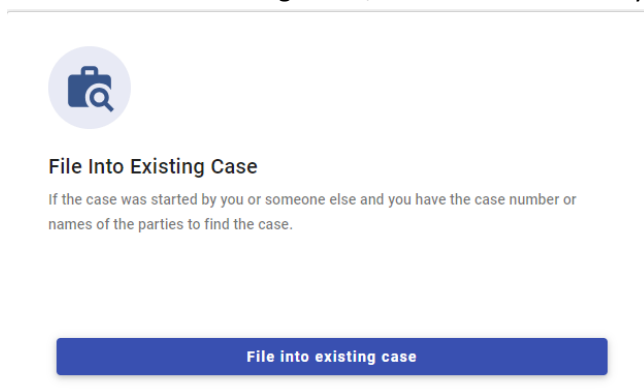
eFiling a Document into an Existing Case

These directions are for filing into an existing case (you have a case number already). The screen shots and information are for filing through Odyssey eFile CA. If you are opening a new case return to step 13.

25. Login to your e-file account, you should be on the home screen called the "Dashboard". From here select the blue button "Start Filing"



26. Select "File Into Existing Case", reminder this means you DO NOT have a case number.



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27. Select the location for your filing, from the drop-down list. You'll want one of the Santa Cruz options.
 - i. Santa Cruz – Appeals
 - ii. Santa Cruz – Civil
 - iii. Santa Cruz – Criminal
 - iv. Santa Cruz – Family
 - v. Santa Cruz – Small Claims
 - vi. Santa Cruz – Probate
28. Type in your case number and select “Search”

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: Santa Cruz - Family

Search for Case by:
 Case Number Party Name

Type your case number exactly as you see it on your case documents.
If the case is not found, or if you do not know the case number, try searching for a case by Party Name. [Click here for more case search tips.](#)

Case Number: 21FL00543

Sort Results By: Newest to Oldest

Cancel Search

29. The case number you searched should appear. Confirm the correct case has come up by checking the names in the description. If it is not the right case, select REFINE SEARCH to search again. If this is the right case, select “Actions” and from the drop-down menu select “File into case”

Case Category	Case Type
Family	Family Support - UIFSA

1 - 1 of

Actions

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

30. Select “Parties” then Select “Filings” so that you are now on the Filings screen.
31. On the Filing screen you will identify what it is you are filing and attach the documents. Start by selecting the “+ Add Filing” button in the middle of the screen.

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32. From the drop-down menu under Filing Code, find the description that best matches the name of the document you are filing.

eFile Only
Pick "eFile Only" to just electronically file your papers.

eFile and Serve
Electronically file your papers with the court and have your documents sent to the selected service contacts.

Filing Information

* Filing Code
Filing Code is Required.

Filing Description

Client Reference Number

Comments to Court

a. You can leave the other fields blank and scroll down to where it says Upload Documents. Drag your PDF document to the box or hit "Select file" to locate the PDF document on your computer to upload it.

Upload Documents

To add more than one lead document to the filing, create another filing and upload your document.

* Lead Document (Required)

Drag files here or

Select file

Maximum file size: 36.70 MB
Accepted file types: Portable Document File (PDF)

- b. Select Save in the bottom right
- c. If you have additional filings select "+ add more"

33. Once you are done with the filings you may proceed to the section for Fees. Some filings have a filing fee, if you do not have a fee waiver and are unsure if your filing requires a filing fee contact the Self-Help Center or Clerk's Office to ask.

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34. Select your payment account from the drop down. If you are submitting a fee waiver with your filing you should have set up a payment account type for Waiver, if you did not, return to items 11-12 for directions on how to do this. Select your name as the Party Responsible for the Fees, even if the fees are being waived. When you're done, Select the blue "Summary" button in the bottom right corner.

The screenshot displays two side-by-side panels. The left panel, titled 'Fees', contains a dropdown menu for 'Payment Account' with 'Waiver' selected, a '+ Add payment account' link, and another dropdown for 'Party Responsible for Fees' with 'bob smith' selected. The right panel, titled 'Fee Breakdown', contains a 'Calculate fees' button. At the bottom right of the interface, there are two buttons: 'Service' and 'Summary'.

35. You are now looking at a summary of your filing, scroll through and review the information. When you're ready, select the "Submit" button on the right side of the screen.
36. Once your filing has been submitted you should receive an email confirmation. After the court has reviewed your filing, allow 24 hours for processing. You will receive another email telling you if your filing was accepted or if it was rejected for problems that need to be corrected. If your filing is rejected there should be an explanation as to why, if you have any questions, you can contact the Clerk's Office or Self Help Center.
37. The Court does not automatically serve the other party in your case with any of the documents you filed. There usually are more steps to be taken after filing. If you DO NOT get your filing returned to you via email and/or DO NOT understand your next steps, please contact the Clerk's Office or Self Help Center at 831-786-7200 weekdays between 8am and 1pm or email selfhelp.information@santacruzcourt.org