

How to e-File

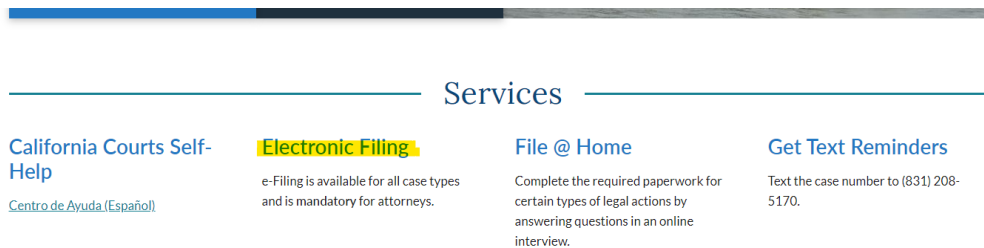
A step by step guide from the Santa Cruz Self Help Center and Law Library on how to register and initiate a new case or submit a subsequent filing into an existing case through e-file.

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 14.

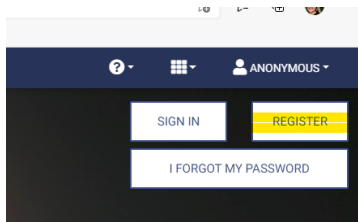
1. Visit the court's website at www.santacruz.courts.ca.gov
2. On the home page in the middle under Services select "Electronic Filing"



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 in the upper right corner



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6. Select that you are filing as an individual

Register for a Self-Represented Account

Examples:

- Pro Se Filers
- Process Servers
- Landlords / Tenants

INDIVIDUAL

7. Fill in all the required areas outlined in red, then select Next.

eFile California Registration - User Information

Select Type **User Information** Contact Information

First Name * Middle Name Last Name *

First Name is Required. Last Name is Required.

Email Address * Confirm Email Address *

Email Address is Required. Confirm Email Address is Required.

Password * Confirm Password *

Password is Required. Confirm Password is Required.

RESELECT TYPE NEXT

8. Fill in your contact information

eFile California Registration - Firm/Contact Information

Select Type User Information **Contact Information**

Country
United States

Address Line 1 * Address Line 2

Address Line 1 is Required.

City * State * Zip Code *

City is Required. State is Required. Zip Code is Required.

Phone Number *

Phone Number is Required.

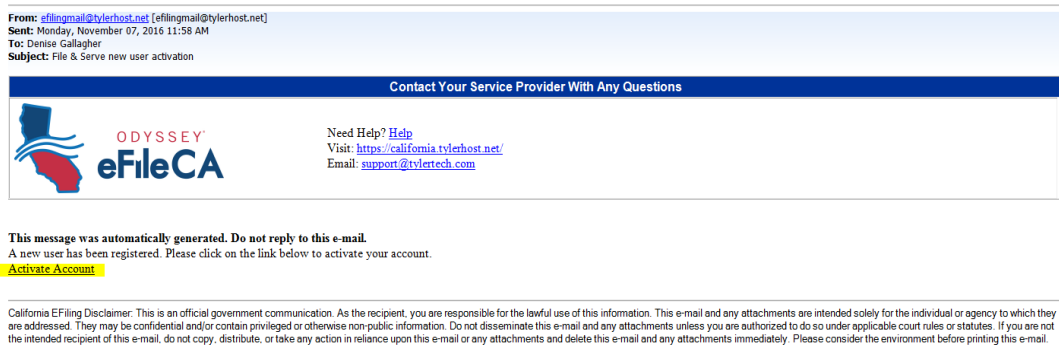
I agree to the Terms and Conditions
You must accept the Terms and Conditions.

USER INFORMATION SUBMIT

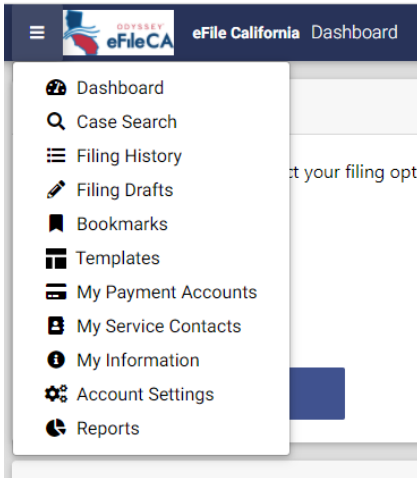
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- An email will be sent to you to confirm and complete setting up your account. Go to your email and open the email from efilingmail@tylerhost.net. If you don't see the email check your spam folder. Once you open the email select Activate Account.



- Sign into your e-file account
- 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.



- Select ADD ACCOUNT

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 echeck.

- 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)

The screenshot shows the "ADD ACCOUNT" form. At the top, there are two dropdown menus for "Account Type" and "Account Status", both set to "Select...". To the right of these are "FILTER" and "RESET" buttons, and an "ADD ACCOUNT" button with a plus sign icon. Below this is a table with columns: "Payment Account Name", "Payment Account Type", "Status", "Last 4 Digits", and "Actions". The table has one row with the value "Active". Below the table is a form for creating a new account. It has a label "Account Name" with a red asterisk. There are two radio buttons: "Waiver" (selected) and "Credit Card or Bank Account". A red error message "Account Name is Required." is displayed below the input field. At the bottom right are "CANCEL" and "CREATE WAIVER" buttons.

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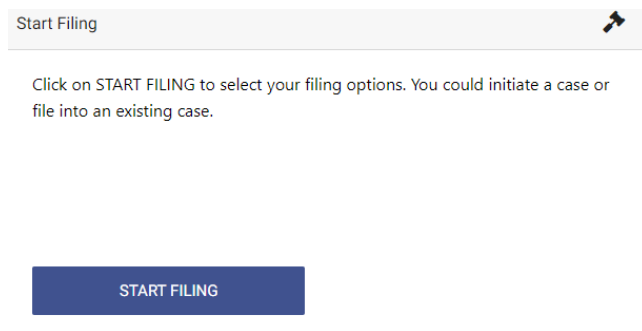
If you are adding an echeck or credit card, a blue box will appear that says, “Enter Account Information”, select the box and follow the prompts to complete the information then hit continue in the bottom right corner.

13. 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 27.

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

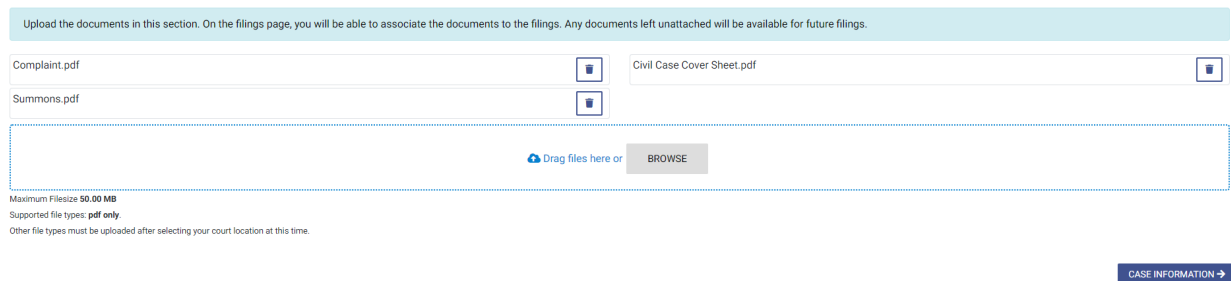


15. Select the filing location

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

16. Under New Case click on “START A NEW CASE”, reminder this means you DO NOT have a case number.

17. Upload the documents for your filing. For a new case you should have multiple documents (i.e. Civil – Complaint, Summons, Civil Case Cover Sheet; Family – Petition, Summons). When done select “CASE INFORMATION”



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18. Select the Case Category for your case
 - a. Select the Case Type that best describes your filing.
 - b. Select the blue "PARTIES" button when done

Documents Case Parties Filings Service Fees Summary

Location * Santa Cruz - Civil Case Category * Civil - Unlimited

Case Type * Other Collections - \$435.00

← UPLOAD DOCUMENTS SAVE AND EXIT PARTIES →

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.
 - a. 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.
 - b. Select the blue "FILINGS" button at the bottom when done

Personal Address Additional Identifiers

Party Type Plaintiff

Personal Information
 Person Entity
I AM THIS PARTY

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

Party CMS ID Interpreter
Select...

Attorney Information
Lead Attorney
Select...

GO TO ADDRESS

Defendant This is a required Party

+ ADD PARTY

← CASE INFORMATION SAVE AND EXIT FILINGS →

Party Type	Required Party	Party Name	Actions
Plaintiff	This is a required Party	bob doe	
Defendant	This is a required Party	chris smith	

+ ADD PARTY

← CASE INFORMATION SAVE AND EXIT FILINGS →

20. You are moved the "Filings" section. Here you will identify what it is you are filing and attach the documents.
 - a. 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.

How to e-File

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Details Optional Services Communication Hide Details

Filing Type * eFile Only Filing Code * Complaint

Filing Description Client Reference Number

Comments to Court

GO TO OPTIONAL SERVICES

- b. You can leave the other fields blank and go to the one that says Lead Document, then select ADD DOCUMENTS. From here select which previously uploaded document goes with this filing code.

Select document(s) for Lead Document

Not Selected Selected

Summons.pdf → 🗑️ Complaint.pdf ←

Civil Case Cover She... → 🗑️

📁 Drag files here or BROWSE

Maximum Filesize: 36.70 MB
Supported File Types: Portable Document File (PDF) .

CANCEL SAVE

- c. Select Save, then select ADD FILING to add the rest of your filing codes and documents. Every document must have its own filing code.

Upload Documents *

Component	Name	Actions	Description	Security
Lead Document	Complaint.pdf	✎	Description Complaint	Select...

+ ADD FILING

- d. Select the blue "SERVICE" at the bottom when you are all done

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21. No service through efile is required, go ahead and select “FEES” at the bottom
22. 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 13-14 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 “Save Changes” button in the bottom right corner.

Documents > Case > Parties > Filings > Service > **Fees** > Summary

Payment Account *
waiver

Party Responsible for Fees *
bob doe

SEARCH

CALCULATE FEES

← SERVICE CONTACTS SAVE AND EXIT SUMMARY →

23. Once the changes are saved select the Summary button.
24. 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.
25. 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.
26. 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 14.

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

Start Filing

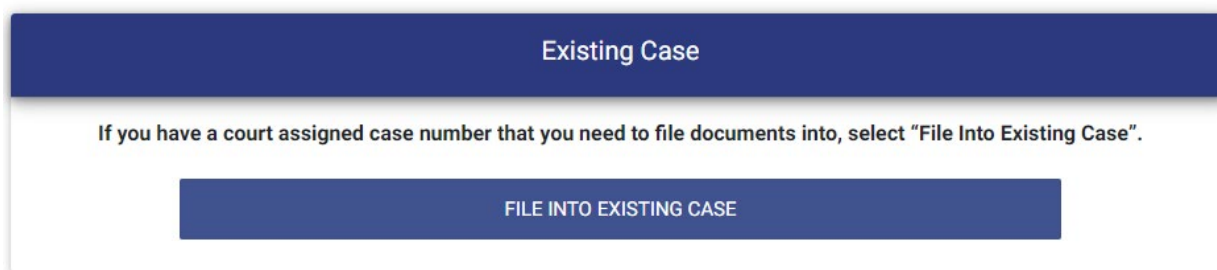
Click on START FILING to select your filing options. You could initiate a case or file into an existing case.

START FILING

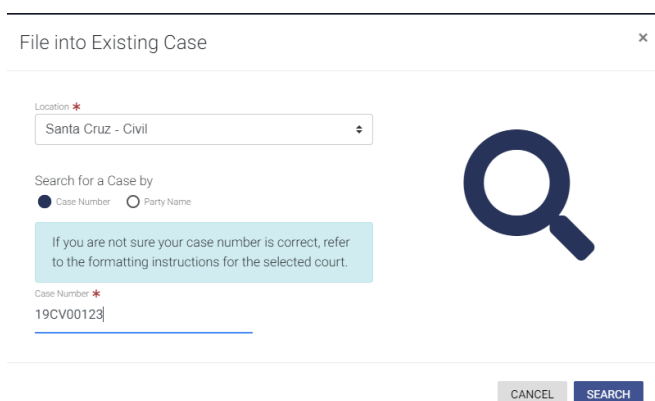
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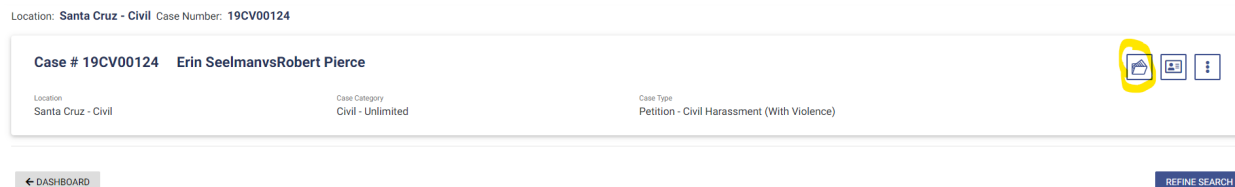
28. Select the location for your filing, from the drop-down list. You'll want one of the Santa Cruz options.
 - e. Santa Cruz – Family Law
 - f. Santa Cruz – Small Claims
 - g. Santa Cruz – Civil
 - h. Santa Cruz – Probate
29. Under Existing Case select "FILE INTO EXISTING CASE", this mean you have a case number



30. Select search by case number and fill in your case number then select Search



31. 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 the first icon of a folder with paper next to the case.



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Upload the documents in this section. On the filings page, you will be able to associate the documents to the filings. Any documents left unattached will be available for future filings.

Complaint.pdf	<input type="checkbox"/>	Civil Case Cover Sheet.pdf	<input type="checkbox"/>
Summons.pdf	<input type="checkbox"/>		

Drag files here or

Maximum Filesize 50.00 MB
Supported file types: pdf only
Other file types must be uploaded after selecting your court location at this time.

[CASE INFORMATION](#)

33. Select "PARTIES" then Select "FILINGS" so that you are now on the Filings screen
34. On the Filing screen you will identify what it is you are filing and attach the documents.

Details Optional Services Communication [Hide Details](#)

Filing Type: eFile Only Filing Code: Complaint

Filing Description: Client Reference Number

Comments to Court

[GO TO OPTIONAL SERVICES](#)

- a. You can leave the other fields blank and go to the one that says Lead Document, then select ADD DOCUMENTS. From here select which previously uploaded document that goes with this filing code.

Select document(s) for Lead Document

Not Selected	Selected
Summons.pdf <input type="button" value="→"/> <input type="button" value="🗑"/>	<input type="button" value="←"/> Complaint.pdf
Civil Case Cover She... <input type="button" value="→"/> <input type="button" value="🗑"/>	

Drag files here or

Maximum Filesize: 36.70 MB
Supported File Types: Portable Document File (PDF)

- b. Select Save

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- c. If you have additional documents, then select ADD FILING to add the rest of your filing codes and documents. Every document must have its own filing code.

Component	Name	Actions	Description	Security
Lead Document	Complaint.pdf		Description Complaint	Select...

[+ ADD FILING](#)

- d. Select the blue “SERVICE” at the bottom when you are all done

36. Select “FEES” at the bottom to move the payment screen

37. 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.

38. 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 13-14 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 “Save Changes” button in the bottom right corner.

Documents > Case > Parties > Filings > Service > **Fees** > Summary

Payment Account *
waiver

Party Responsible for Fees *
bob doe SEARCH

CALCULATE FEES

← SERVICE CONTACTS SAVE AND EXIT SUMMARY →

39. Once the changes are saved select the Summary button.

40. 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.

41. 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.

42. 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