

How to e-File

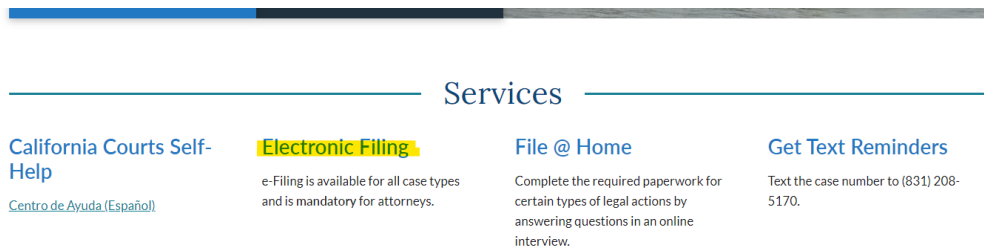
A step by step guide from the Santa Cruz Self Help Center and Law Library on how to register and initiate a new case or submit a subsequent filing into an existing case through e-file.

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.

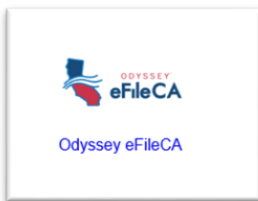
Setting up an e-File Account

If you already have an account set up, login to your e-file account and skip to step 14.

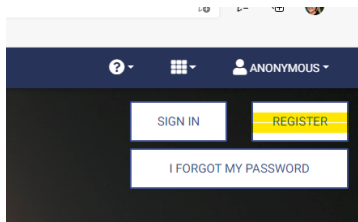
1. Visit the court's website at www.santacruz.courts.ca.gov
2. On the home page in the middle under Services select "Electronic Filing"



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

First Name *
First Name is Required.

Middle Name

Last Name *
Last Name is Required.

Email Address *
Email Address is Required.

Confirm Email Address *
Confirm Email Address is Required.

Password *
Password is Required.

Confirm Password *
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 1 is Required.

Address Line 2

City *
City is Required.

State *
Select...
State is Required.

Zip Code *
Zip Code is Required.

Phone Number *
Phone Number is Required.

I agree to the [Terms and Conditions](#)
You must accept the Terms and Conditions.

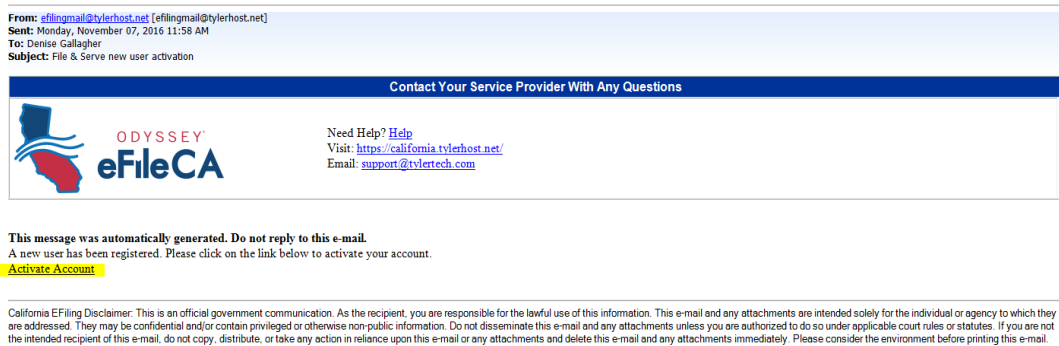
USER INFORMATION

SUBMIT

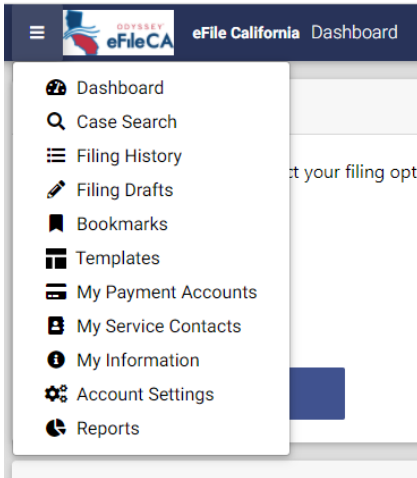
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- An email will be sent to you to confirm and complete setting up your account. Go to your email and open the email from efilingmail@tylerhost.net. If you don't see the email check your spam folder. Once you open the email select Activate Account.



- 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 Name" and "Account Type", 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 status "Active". Below the table is a form for creating a new account. It has a "Create a new:" section with two radio buttons: "Waiver" (selected) and "Credit Card or Bank Account". Below this is a red error message: "Account Name is Required." At the bottom right of the form are "CANCEL" and "CREATE WAIVER" buttons.

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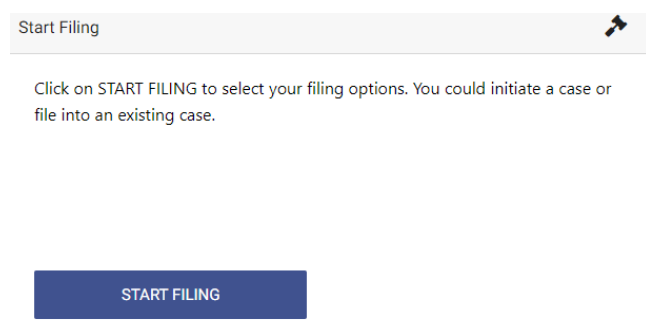
If you are adding an echeck or credit card, a blue box will appear that says, “Enter Account Information”, select the box and follow the prompts to complete the information then hit continue in the bottom right corner.

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

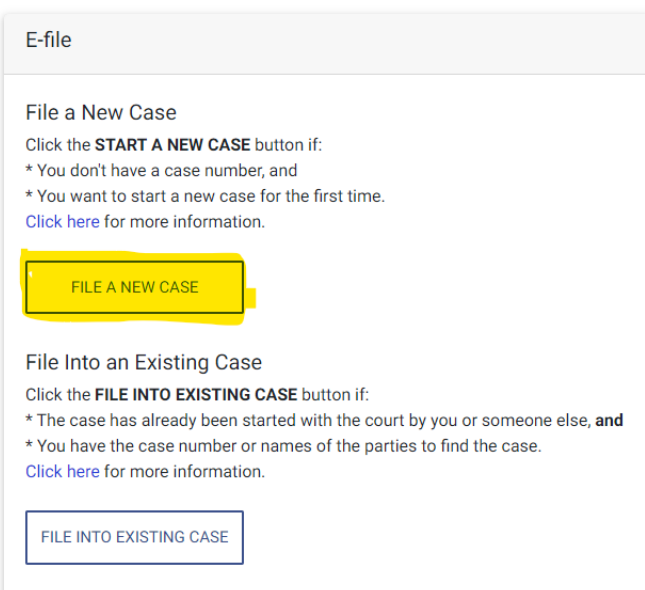
These directions are for opening a new case through e-file (you DO NOT have a case number). The screen shots and information are for filing through Odyssey e-File CA. If you have a case number skip to step 24.

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

Start Filing



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16. 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

17. 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

Case Information

You must first choose a Location, followed by a Category, then a Case Type. If you do not see the case type you need, try another Category for a different list of case types. For additional information, click [here](#).

Location *
Santa Cruz - Family x

Case Category *
Family x

Case Type *
Dissolution With Minor Children - \$435.00 x

SAVE DRAFT AND EXIT

PARTIES →

18. 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 How Details

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

← CASE INFORMATION SAVE AND EXIT

+ ADD PARTY
FILINGS →

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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 →](#)

19. You are moved the “Filings” section. Here you will identify what it is you are filing and attach the documents.
- 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.

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](#)

- You can leave the other fields blank and go to the bottom where it says Upload Documents. Drag your PDF document to the box or select browse to locate the PDF document on your computer to upload it.

Upload Documents *

Type	Name	Size	Actions	Description	Security
Lead Document					

This document is required.

Drag file here or BROWSE

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

- Select ADD FILING at the bottom 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...

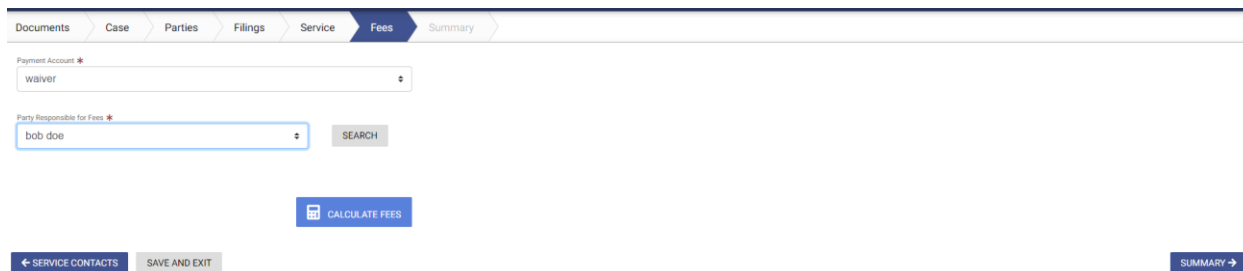
[+ ADD FILING](#)

- Select the grey “SKIP TO FEES” at the bottom when you are all done

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20. 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 "SUMMARY" button in the bottom right corner.

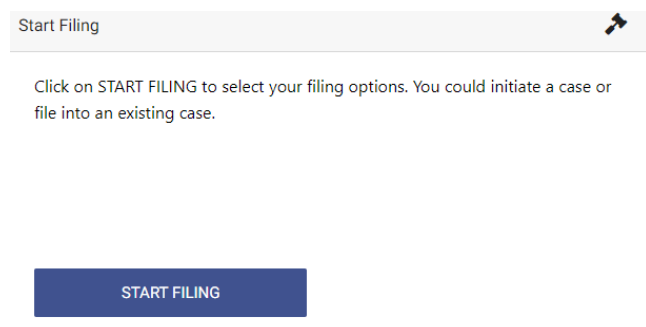


21. You are now looking at a summary of your filing, scroll through and review the information. When you're ready, select the "SUBMIT" button on the right side of the screen.
22. Once your filing has been submitted you should receive an email confirmation. After the court has reviewed your filing, allow 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.
23. 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.

24. 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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25. Under File Into an Existing Case click on “FILE INTO EXISTIING CASE”, reminder this means you DO NOT have a case number.

Start Filing

The screenshot shows a web interface titled "E-file". It has two main sections. The first section is "File a New Case" with instructions to click the "START A NEW CASE" button if the user doesn't have a case number or is filing for the first time. Below this is a button labeled "FILE A NEW CASE". The second section is "File Into an Existing Case" with instructions to click the "FILE INTO EXISTING CASE" button if the case has already been started or if the user has the case number. Below this is a button labeled "FILE INTO EXISTING CASE" which is highlighted with a yellow box.

26. 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

27. Select search by case number and fill in your case number then select SEARCH




The screenshot shows a search form titled "File into Existing Case". It includes a search bar with a magnifying glass icon and a close button. Below the search bar is a "Location" dropdown menu with "Santa Cruz - Family" selected. There are two radio buttons for "Search for a Case by": "Case Number" (selected) and "Party Name". A light blue informational box contains instructions: "Type your case number exactly as you see it on your case documents." and "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." Below this is a "Case Number" input field with "21FL00543" entered. At the bottom are "CANCEL" and "SEARCH" buttons.

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28. 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.

Location: Santa Cruz - Civil Case Number: 19CV00124

Case # 19CV00124 Erin SeelmannsRobert Pierce			  
Location Santa Cruz - Civil	Case Category Civil - Unlimited	Case Type Petition - Civil Harassment (With Violence)	

[← DASHBOARD](#)

[REFINE SEARCH](#)

29. Select "PARTIES" then Select "FILINGS" so that you are now on the Filings screen
30. On the Filing screen you will identify what it is you are filing and attach the documents.
31. From the drop-down menu under Filing Code, find the description that best matches the name of the document you are filing.


Details	Optional Services	Communication	Hide Details
Filing Type *	eFile Only	Filing Code *	Complaint
Filing Description		Client Reference Number	
Comments to Court	<div style="border: 1px solid #ccc; height: 40px;"></div>		
GO TO OPTIONAL SERVICES			

- a. You can leave the other fields blank and go to the one that says Upload Documents, then select ADD DOCUMENTS. Drag your PDF document to the box or select browse to locate the PDF document on your computer to upload it.

Upload Documents *

Type	Name	Size	Actions	Description	Security
Lead Document	<div style="border: 1px dashed #ccc; padding: 10px; text-align: center;">This document is required.</div> <div style="text-align: center; margin-top: 5px;">📁 Drag file here or BROWSE</div>				
<small>Maximum File Size: 36.70 MB Supported File Types: Portable Document File (PDF)</small>					

- b. 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		<div style="border: 1px solid #ccc; padding: 5px;">Description Complaint</div>	Select...

[+ ADD FILING](#)

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- c. Select the grey “SKIP TO FEES” button at the bottom when you are all done
32. Select “FEES” at the bottom to move the payment screen
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.
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 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 “SUMMARY” button in the bottom right corner.

The screenshot shows a web interface for filing fees. At the top, a breadcrumb trail reads: Documents > Case > Parties > Filings > Service > Fees > Summary. Below this, there are two dropdown menus. The first is labeled 'Payment Account' and has 'waiver' selected. The second is labeled 'Party Responsible for Fees' and has 'bob doe' selected, with a 'SEARCH' button to its right. Below the dropdowns is a blue button with a calculator icon and the text 'CALCULATE FEES'. At the bottom of the interface, there are three buttons: '← SERVICE CONTACTS', 'SAVE AND EXIT', 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