



Oregon Judicial Department

File & Serve: Filing Code Quick Reference Guide

03/04/2022

The purpose of this guide is to assist you in eFiling cases using Odyssey File & Serve. This guide focuses on specific processes in the Oregon Circuit Courts. For a more step-by-step approach to eFiling see the *Quick Reference Guide* on the File & Serve homepage.

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Filing a new case with File & Serve

When filing a new case you must select the correct case category and case type. File & Serve divides all case types into six different categories: Civil, Criminal, Juvenile Delinquency, Juvenile Dependency, Family, and Probate or Mental Health. (Note: you cannot initiate Criminal or Juvenile Delinquency cases through File & Serve.) Once you select the case category, the **Select Case Type** drop-down box will populate.

The screenshot shows two dropdown menus. The first is labeled 'Category' and has 'Civil' selected. The second is labeled 'Case Type' and contains the text 'Click to select Case Type'.

Finding the correct case type

Odyssey, our new case management system, consolidated many civil and family case types from their predecessor types in OJIN; the following table will guide you in selecting the correct case category, case type, and initiating filing code for some of the more common case types.

<u>Case Category</u>	<u>Odyssey Case Type</u>	<u>OJIN Case Type</u>	<u>Initiating Filing Code</u>
Civil	Contract	Contract Declaratory Judgment Money Action Specific Performance	Complaint
Civil	Document Recording	Administrative Order Confession of Judgment Register Foreign Judgment Transcript of Judgment Out of State Disposition	
Civil	Identity Record	Change of Sex Change of Name and Sex Civil Change of Name Probate Change of Name	Petition
Civil	Property – General	Civil Accounting and Receivership	Complaint



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		Claim & Delivery Eminent Domain Forfeiture Lien Foreclosure Nuisance Abatement Property Seizure Quiet Title Civil Real Property Way of Necessity Property Zoning Civil Damages: Property	
Civil	Tort - General	Civil Discrimination Defamation Fraud False Arrest/Imprisonment Malpractice Other Malicious Prosecution Negligence Personal Injury Tort Other	Complaint
Family	Dissolution	Dissolution of Marriage Dissolution of Reg Dom Partnership Dissolution of Unreg Dom Partnership	Petition

Using Case Subtypes

Case subtypes help courts track specific types of filings within case types. Case subtypes are available for some Civil and Probate or Mental Health case types. If a case subtype is available, it will appear when you initially select the case type. Select the subtype if it is applicable to your case.

Case Type	Case Sub Type
Contract	Debt Buyer - UTCR 5.180(2)



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Filing an Adoption Case

There are several unique codes available for adoption filings through File & Serve. Some of them are classified within the system as Public and some as Confidential (NOTE: Adoption cases are not public cases).

The following should be filed as CONFIDENTIAL documents:

ASSIS Exhibit – Adoption Report: Center for Health Statistic – ASAR

ASSIS Exhibit – Home Study – ASHS

ASSIS Exhibit – Medical History – ASMH

ASSIS – Adoption Summary and Segregated Information Sheet – ASSM

ALL adoption exhibits and the adoption summary (Adoption Report, Home Study, and Medical History) **MUST** be eFiled as **separate** confidential documents within the same envelope. Below is an example of a properly uploaded home study using the filing code ASSIS Exhibit – Home Study – ASHS. See UTCR 21.040(2)(b).

The screenshot shows a web interface for document filing. At the top, it says "Lead Document (Required)". Below this, a document titled "ASSIS Exhibit - Home Study.pdf" is shown with a size of "15.37 MB". To the right of the document is a "Security" dropdown menu. The dropdown is open, showing three options: "Click to select Security" (highlighted in blue), "Confidential" (highlighted in dark grey), and "Public".

Initiating a Contempt Proceeding

A filer cannot initiate a contempt proceeding using File & Serve. Any initiating document (including a motion) filed under ORS 33.055 (remedial) or an accusatory instrument that initiates a contempt proceeding under ORS 33.065 (punitive) must be conventionally filed with the court. When conventionally filing an initiating document with the court, the party may include any supporting documentation. See UTCR 21.070(3).



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Filing Codes

The filing code tells the system what you are filing. The filer is responsible for selecting the correct code when filing their documents with the court. There are two types of filing codes, general and specific. An example of a general filing code is "Petition". A filer will use the generic filing code "Petition" when no specific code exists for the type of petition the filer is filing. An example of a specific filing code is "Petition - Guardianship". A filer will use the "Petition – Guardianship" code when filing a petition for guardianship. For a complete list of filing codes, see the *OJD eFiling Code List*.

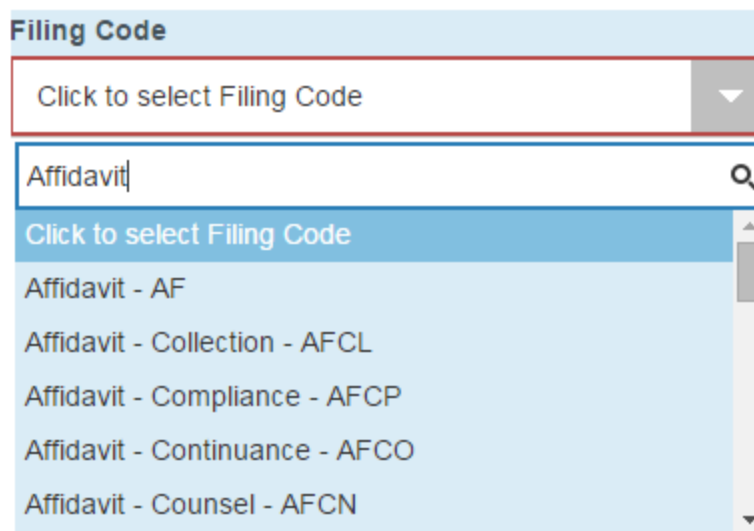
Searching for filing codes

Filers may search for codes in the Select Filing Code drop-down menu.

To search:

- 1) Click on the down arrow  in the Select Filing Code drop-down menu.
- 2) Type the search word (Note: the word you type will not appear in the drop-down box).
- 3) File & Serve will pull up all of the filing codes that have that word.

The screenshot below shows the results of typing "Affidavit" in the drop-down menu.



Finding the correct filing code

Attorneys use many different names for documents that they file. Select the filing code that most corresponds to what you are filing.



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Service

If you are filing a certificate of service or a proof of service document use the following filing codes:

Proof of Service – Substitute – PSSE (For substitute service only)

Affidavit/Declaration – Mailing – ADMA (For mailing only; inclusive of affidavits of due diligence with mailing)

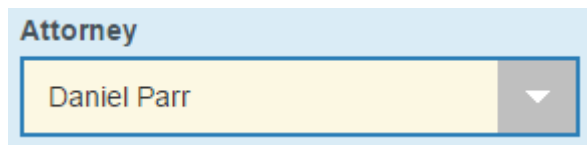
Affidavit/Declaration – Publication – ADPU (Publication only)

Proof – Service – PRSV (All other)

Filing a Notice of Representation

Filing a Notice of Representation is a two-step process:

- 1) From the Parties Screen, click the down arrow in the Attorney drop-down list to add an attorney to the party record.



- 2) From the Filings Screen, select Notice – Representation – NORP from the filing Code drop-down list.

Note: If an attorney already represents the party in the system, you cannot add an attorney in step 1; notify the court that you are the new attorney on the case through the Comments Field.

Filing a Supplemental Confidential File Document

To file a document, in a Juvenile or Criminal case, that is to be reviewed by the court but is not to be entered on the Register of Actions, follow the steps below:

- 1) From the filings screen select the filing code Supplemental Confidential File Document – SCFD.
- 2) After you upload the document, mark it confidential by selecting **Confidential** in the *Security* drop-down list.



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Filing Fees

Statutory filing fees must be paid at the time of filing. There are three ways you will encounter filing fees through the File & Serve system. All fees are tied to a filing code. If you need to pay a specific fee and it is not showing up you may be using the wrong filing code.

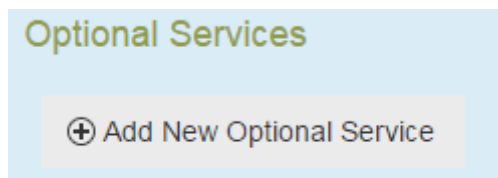
A list of court filing fees is located here: <https://www.courts.oregon.gov/Pages/fees.aspx>

Optional Services

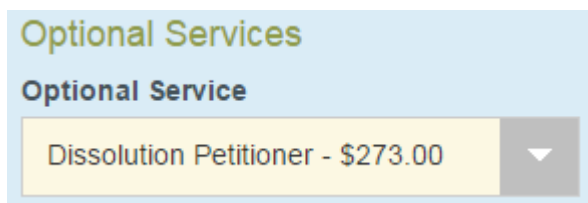
The *Optional Services* box will appear whenever you select a filing code with multiple court fees attached to that filing code. If a statutory court fee is required for the document you are filing, you must select the correct fee from the *Optional Services* box. If you are filing a document that does not require a statutory court fee do not select any optional services.

To add a statutory filing fee,

- 1) Select + *Add New Optional Service*.



- 2) Select the correct filing fee from the drop-down list:



- 3) Click **Save Changes**.

- 4) The fee will appear under the Optional Services section:

Optional Service	Quantity	Fee Amount	Actions
Dissolution Petitioner	1	273	

- 5) The fee will appear in the Fees section:



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Description	Amount
Filing Fee	\$0.00
E-File Fee	\$0.00
Court E-File Fee	\$0.00
Mail Service Fee	\$0.00
Payment Service Fee	\$0.00
Provider E-File Fee	\$0.00
Provider Tax	\$0.00
Dissolution Petitioner	\$273.00
Filing Total:	\$273.00

Filing Fees tied to Filing Codes

Some filing fees are tied to a specific filing code. This occurs when the fee is 1) always required for the filing and 2) the only fee that can apply.

Filing Code

Complaint - Declaratory Judgment - CM - \$252.00 ▼

Filing an Amended Pleading or Inventory

The following detail how to file an amended pleading or inventory that result in an increased filing fee in a civil or probate case through File & Serve.

Amended Prayer Amount

Follow the below steps to file an Amended Complaint with a new prayer amount that requires additional filing fees.

- 1) From the Filings screen select Complaint – Amended – CMAM from the filing code drop-down list.

Filing Code

Complaint - Amended - CMAM with optional service. ▼

- 2) Upload or attach the amended complaint.

- 3) Click **Save Changes**.

- 4) Under Optional Services, click **+ Add New Optional Service**.



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- 5) Under Optional Service locate the proper filing fee for the increase.

Optional Services

Optional Service

AC09 - Amended Pleading- Additio. ▼

- 6) Click .

For example, the above fee is used when the original prayer amount was between \$10,000 and \$49,999 and is being amended to an amount of \$10,000,000 or more.

Civil Complaint that originated in Small Claims

When an Answer requesting a jury trial is filed in a small claims case, the Plaintiff must file a formal civil complaint. The amount paid to file the Small Claim is credited against the Civil filing fee. Follow the below steps to pay the difference between the two filing fees.

- 1) From the filings screen select the filing code “Complaint – Originally Small Claim”
- 2) A list of optional services will appear below. Select the fee that applies.

Note: There are two fees available for each Civil filing fee level, one is the fee minus the Small Claim fee for a claim \$2500.00 or less (\$57.00) and the other is the civil fee minus the Small Claim fee of \$2500.00 or more (\$102.00).

- 7) Add a Filing comment stating the case number of the Small Claim that was originally filed.

Increased Estate Value Filings

If an estate amount is increased through a subsequent filing, putting it within the range of a higher filing fee, follow the below steps to pay the difference between the original filing fee and the higher filing fee required by the new estate amount.

- 1) From the filings screen select one of the following filing codes:
 - a. Petition – Amended – PTAM
 - b. Inventory – IT
 - c. Petition – Cross Petition – PTCX



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- 2) After selecting one of the above filing codes, a list of optional services will appear below. Select the proper amount and click Add.
- 3) Add a filing comment to inform court staff of the increase in the Estate value.

Documents and Document Formatting

Documents must be submitted in a text-searchable PDF or PDF-A format. Fillable PDF documents should not be submitted using File & Serve. The rule governing document formatting for documents filed through File & Serve can be found at UTCR 21.040.

A main document and its attachments must be submitted as a single unified PDF document to the extent practicable. The filing code selected should match the main document that you are filing.

There are two exceptions to this rule:

- 1) **Confidential Attachment:** If any attachment is confidential (like a Confidential Information Form) then that particular attachment should be filed as a separate document in the same envelope using a filing code that matches its description. The filer should select **Confidential** from the *Security* drop-down list.

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- 2) **Proposed Order or Judgment:** Any document needing the courts signature must be eFiled as a separate document within the same envelope as its supporting documentation. For example, a motion and affidavit may be a single document (if the affidavit is an attachment to the motion) but the proposed order must be separate.



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Other Processes

Filing Comments

The purpose of the Filing Comments field is to communicate with the court any information necessary for your filing. These comments do not move into the case management system or public access. Only court staff reviewing your filing have access to the filing comments.

A screenshot of a web form titled "Comments to Court". It features a light blue header with the title and a large, empty white text input box below it.

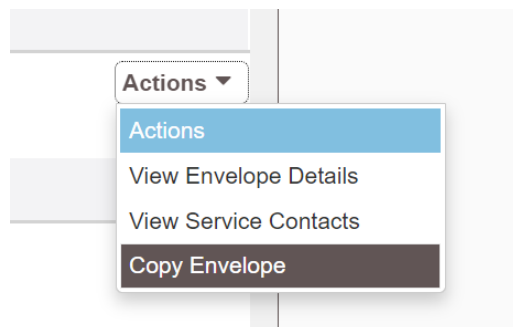
Courtesy Copy

The courtesy copy feature sends an email when the court accepts a filing to all of the email addresses entered into the Courtesy Copy field. An email sent in this manner does not constitute service.

A screenshot of a web form titled "Courtesy Copies". It has a light blue header with the title, a white text input box, and a small circular icon with an "i" inside to the right of the input box.

How to resubmit a rejected filing

If the entire envelope is rejected the *Copy the Envelope* option will become available in the Actions menu. This feature allows you to copy the entire envelope that you filed, fix the issue with the filing, and then resubmit (as a new envelope) the filing to the court. To access this option, from the Filer Dashboard select *Returned* under *My Filing Activity*, then select the *Actions* menu on the right side of your screen.



If the court rejected only part of your filing this feature is not available and you will have to start a new filing, you can do so by using *File into this Case*. If you are requesting a relation back date to your filing, please consult UTCR 21.080(5).