

File & Serve *Maryland*™

USER GUIDE

Dashboard Overview



What's Inside

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File & Serve *Maryland* (FSMD) has many resources available to you in order to address your questions and concerns:

- **FSMD Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 888.529.7587. They are available 24/7/365.
- The **FSMD** website (www.fileandservemaryland.com) contains helpful information for using the FSMD system. The website houses our training registration information, user guides, pricing, and more.

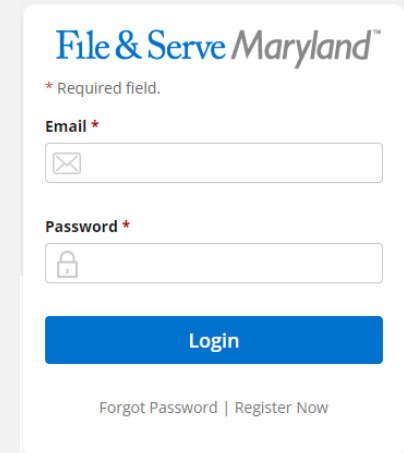
This FSMD User Guide provides a convenient source of information to help you manage your eService notifications in case matters.

IMPORTANT: If you have registered your email address with Maryland Odyssey File and Serve, the same username and password can be used with FSMD.

Before You Begin

1. Refer to the appropriate court rules on electronic filing prior to using FSMD to ensure that you are in compliance with local requirements.
2. Check our minimum system requirements for using FSMD.
3. If you need assistance, call our Client Support line at 1-888-247-2051. They are available to assist 24/7/365.

Logging in to FSMD



File & Serve Maryland™

* Required field.

Email *

Password *

Login

Forgot Password | Register Now

1. Open Chrome, Safari, or Firefox go to www.fileandservemaryland.com
2. Enter your Username and Password and click **Login**.
3. **If you do not have a Username/Password, please contact your Firm Administrator.**

SUBMIT A NEW FILING

This Tab is used to submit a new case filing or file a subsequent transaction into an existing case. For more information on filing and serving documents, see our FSM D user guides titled, “New Case Filing” and “Subsequent Filing”.

Case Details

STEP 1 - Case Type STEP 2 - Parties STEP 3 - Documents STEP 4 - Service Contact STEP 5 - Review & Submit

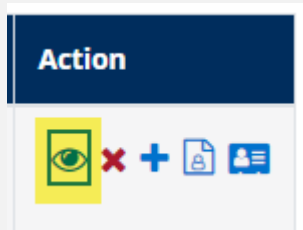
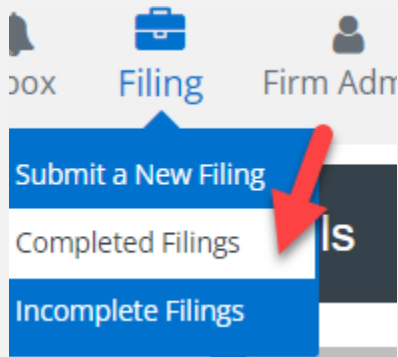
* indicates a required field.
Please note that the context of the page and the options available to you can change based on your selections.

Is this filing for an existing case? *	Case Type *
<input type="text" value="No"/>	<input type="text" value="No Case Type selected"/>
Jurisdiction * <input checked="" type="radio"/> Preferred list <input type="radio"/> Full list	Payment Account *
<input type="text" value="No Jurisdiction selected"/>	<input type="text" value="No Payment Account selected"/>
Case Category *	Attorney *
<input type="text" value="No Case Category selected"/>	<input type="text" value="No Attorney selected"/>
	Client Matter ID *
	<input type="text"/>

Next

COMPLETED FILINGS

You will be able to view the Transaction Summary by clicking on the *eyeball* icon next to the envelope under *Search Results*. You will be able to *Print* the Transaction Summary. Please see additional screenshot on the next slide.



Completed Filings

+ New Case + Existing Case

Please note that the content of the page and the options available to you can change based on your selections.

Report Type: Report Type
Jurisdiction: Select a Jurisdiction
From Date (mm/dd/yyyy): mm/dd/yyyy
To Date (mm/dd/yyyy): mm/dd/yyyy
Sort By: Sort By
Filing Type: Filing Type
Case Category: Case Category
Filing Code: Filing Code
Case Number: Case Number
Envelope ID: Envelope ID
Filing Status: Filing Status

Go Clear All


Search Results

Need process service, skip trace or courtesy copies?

Show 25 filings per page Search


Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
213375			Fresno - Civil	02/18/2022	Admin Ca	

COMPLETED FILINGS (continued)

 [Printable Version](#) ✕

Envelope ID: 213375

Case Type

Jurisdiction: Fresno - Civil	Case Category: Civil - Unlimited
Case Type: Other P/DP/WD	
Payment Account: Mastercard Account2	Attorney: att1 att1
Case Number: C	<i>Hearing Date is not available in this jurisdiction</i>
Client Matter ID: 1 	Date Filed: 02/18/2022 09:33:09 AM

Case Cross Reference Numbers

Cross Reference Number	Cross Reference Type
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Parties: 5

Sending Party	Party Type	Name	Address	Lead Attorney	Additional Attorneys
✓	Defendant				
✓	Defendant				
	Defendant				
	Defendant				
	Plaintiff				

There are 4 *Reports* that can be performed on the Completed Filings tab. Please see next slide for additional information for each report.

Note: For all *Reports*, Firm Users can choose to access their own filings or *My Firm's Filings*.

The screenshot displays the 'Completed Filings' section of a web application. At the top, a dark grey header contains the text 'Completed Filings'. Below this, a white box contains a note: 'Please note that the context of the page and the options available to you can change based on your selections.' Underneath the note are two dropdown menus. The first is labeled 'Report Type' and has a list of options: 'Daily Docket', 'Case History', 'Docket Search', and 'Transaction Status'. The 'Daily Docket' option is highlighted in blue, and a red arrow points to it from the left. The second dropdown menu is labeled 'Sort By' and has two options: 'My Filings' and 'My Firm's Filings'. The 'My Filings' option is highlighted in blue, and a red arrow points to it from the right.

Reports

1. The *Daily Docket* report allows users to search for filings that they submitted in a specific date range. Use the drop-down menus and type fields to enter your search criteria and click *Go* to run the report.
2. The *Case History* report allows users to search for filings that they submitted in a specific case. Use the drop-down menus and type fields to enter your search criteria and click *Go* to run the report.
3. The *Docket Search* report allows users to search for filings that they submitted and sort them by document type (e.g., Answers). Use the drop-down menus and type fields to enter your search criteria and click *Go* to run the report.
4. The Transaction Status report allows users to search for filings and view what the status is for those filings. Use the drop-down menus and type fields to enter your search criteria and click *Go* to run the report.

RETURN FOR CORRECTION OR REJECTION NOTIFICATIONS

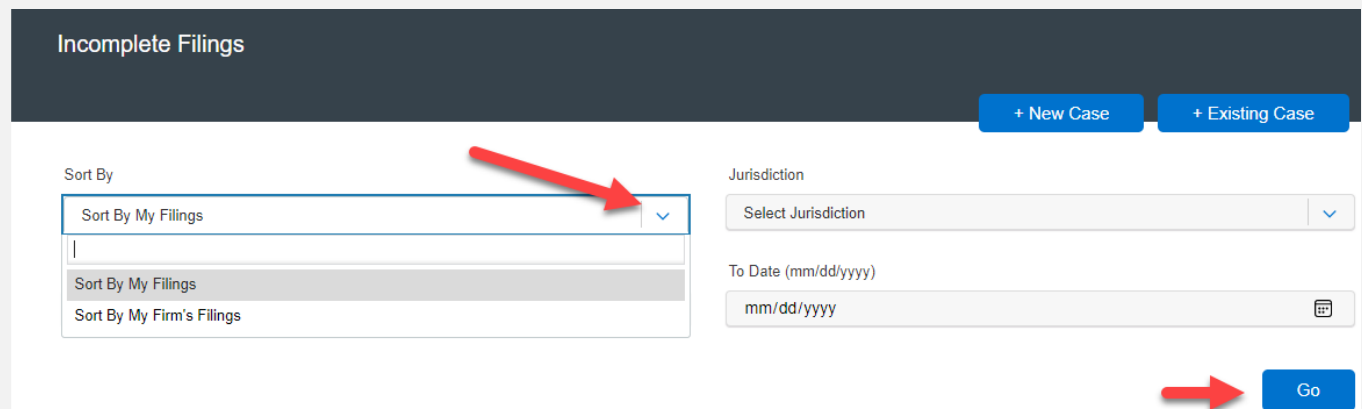
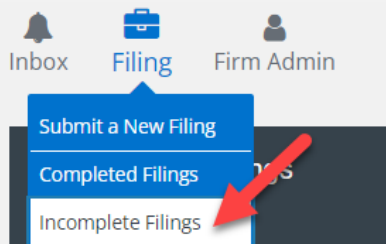
If you receive a *Return for Correction* or a *Rejected* notification from **Maryland Odyssey File and Serve**, please follow these steps to upload and submit your corrected documents:

1. Log onto FSMD and select the *Completed Filings* page from the *Filing* drop-down menu.
2. Find the transaction with the “*back arrow*” in red.
3. Click on the *back arrow* to open the transaction. The *back arrow* allows you to open the transaction easily and re-submit the corrected documents.

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
6191			McLean County	05/03/2017	Training Admin	

INCOMPLETE FILINGS

This Tab is used to search for and view any filings that you (*Sort By My Filings*) or your firm (*Sort By My Firm's Filings*) has not completed and that have been saved in the system. Under the *Filing* drop-down menu, select *Incomplete Filings*.



INCOMPLETE FILINGS (*continued*)

To edit and file the *Incomplete Filing*, simply click on the *edit icon*, finish the transaction, and click *Submit*. To delete it, click on the *delete icon*.

The screenshot displays the 'Incomplete Filings' management interface. At the top, there are two buttons: '+ New Case' and '+ Existing Case'. Below these are search filters for 'Sort By' (set to 'Sort By My Filings'), 'Jurisdiction' (set to 'Select Jurisdiction'), 'From Date' (mm/dd/yyyy), and 'To Date' (mm/dd/yyyy). A 'Go' button is located to the right of the date filters. The 'Search Results' section shows '25 filings per page'. A table lists the results with columns for Jurisdiction, Case Name, Case Number, Created on, Created By, and Action. The first row shows 'Fresno - Civil' with a creation date of '02/17/2022' and 'Admin Ca' as the creator. In the 'Action' column, there are two icons: a pencil (edit) and a trash can (delete). Red boxes with labels 'Edit Icon' and 'Delete Icon' point to these respective icons.

Jurisdiction	Case Name	Case Number	Created on	Created By	Action
Fresno - Civil	[REDACTED]	[REDACTED]	02/17/2022	Admin Ca	[Edit Icon] [Delete Icon]

SERVICE CONTACTS

This Tab is used to search for and view *Service Contacts* that have been saved by your firm or to *Add* new service contacts. To search for a specific Service Contact enter your search criteria and click *Search*. This will populate the screen with only the contact(s) that match your search criteria. Use the *edit icon* to edit the Service Contact or the *delete icon* to remove.

The screenshot shows the 'Service Contact' form and table. A red arrow points to the 'Service Contacts' menu item in the left sidebar. Another red arrow points to the 'Search' button. A green box highlights the 'Edit and Delete icons' in the table's action column.

First Name	Last Name	Email Address	Action
SC	146589		

To *Add* a service contact, click on the *Add New Service Contact* button.

A red rectangular button with the text "Add New Service contact" in white, centered on the page.

A dialogue box will populate. Enter the Service Contact's information. Click *Save* to add the *Service Contact* to your list. **Note:** If anyone needs to be copied on the Service Contact's service, enter one or more email addresses separated by commas (no space) in the *Administrative Copy* field. Click *Save*. Please refer to the screenshot on the next page.

SERVICE CONTACTS (continued)

Create New Contact ✕

* indicates a required field

First Name *	Middle Name	Last Name *
<input type="text"/>	<input type="text"/>	<input type="text"/>

Email Address *

Administrative Copy	Phone Number
<input type="text"/>	<input type="text"/>

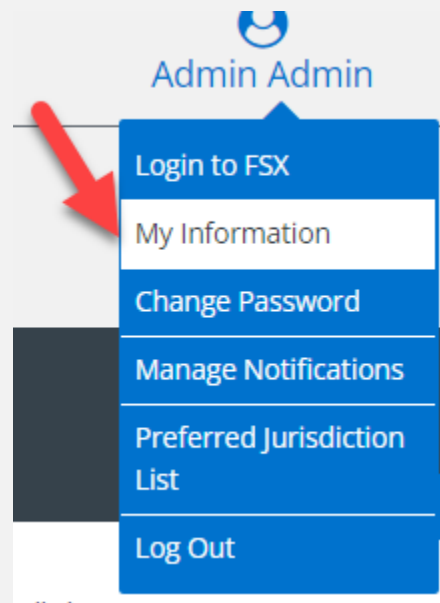
Address Line 1

Address Line 2

City	State	Zip Code
<input type="text"/>	Select State ▼	<input type="text"/>

Make this contact public

This Tab is used to update your user information in the system. To update your information, make the changes in the type fields and click *Submit* to save your changes. Please refer to the next slide for an additional screenshot.



My Information

* indicates a required field.

First Name *

Middle Name

Last Name *

Email *

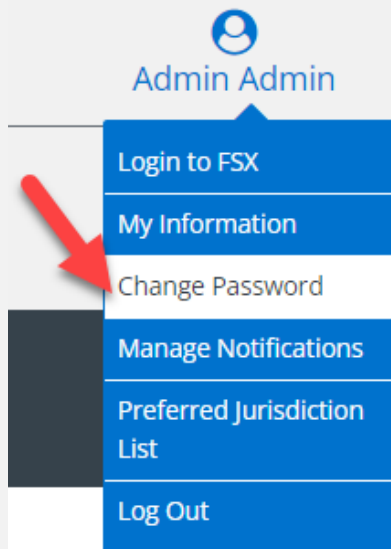
Firm Name



Submit

CHANGE PASSWORD

This Tab is used to change your password and/or security question in the system. To change your password and/or security question, enter the requested information in the type fields and click *Submit*.



A screenshot of the "Change Password" form. The title "Change Password" is in a dark blue header. Below the header, a small asterisk note reads "* indicates a required field." The form contains five input fields: "Old Password *", "New Password *", "Confirm New Password *", "Security Question *", and "Security Answer *". The "Security Question" field contains the text "Pet". A red arrow points to the "Submit" button at the bottom right of the form.