

# File & Serve *Maryland*™

## **USER GUIDE**

### **Firm Administrator**



# 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](http://www.fileandservemaryland.com)) contains helpful information for using the FSMD system. The website houses our training registration information, user guides, pricing, and more.

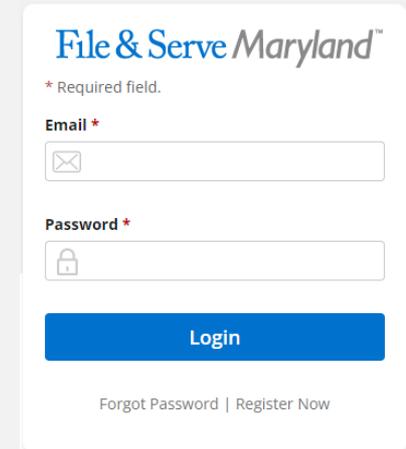
This FSMD User Guide provides a convenient source of information to help you manage your eService notifications in case matters.

**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](http://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.**

# GETTING STARTED

1. Access the FSMD login page via [www.fileandservemaryland.com](http://www.fileandservemaryland.com)
2. Enter your Username/Password and click *Login*

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

File & Serve Maryland™

Resources Support Need to eFile out of state?

File & Serve Maryland™

\* Required field.

Email \*

Password \*

Login

Forgot Password | Register Now

WELCOME TO  
eFILING AND eSERVICE IN

# Maryland

**FSX Support Center**

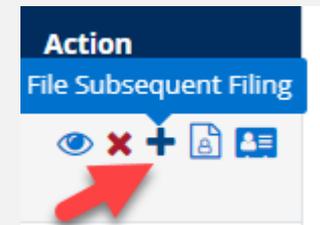
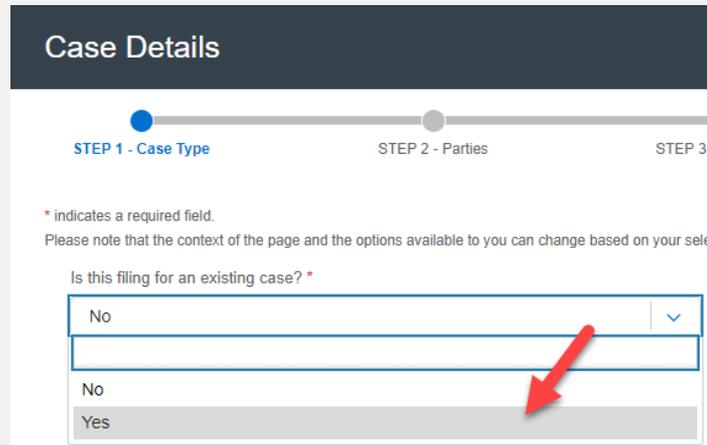
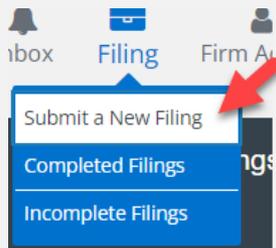
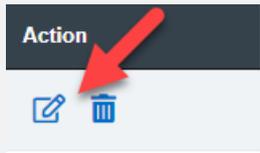
Our team of eFiling experts is available around the clock to assist you!

1-888-529-7587 support@fileandserve.com Chat Online

# GETTING STARTED (continued)

3. Once you are logged into your account, you will be taken to the *Case Details* page to begin your filing. If you have any unfinished transactions from previous sessions, you will be taken to the *Incomplete Filings* page.

4. To begin a subsequent filing or submit an unfinished transaction (*Incomplete Filings*), click on the *edit icon*, the *+Existing Case* button (on the *Incomplete Filings* page or the *Completed Filings* page), or *Submit a New Filing* in the *Filing* drop-down menu. Once on the *Case Details* page, select *Yes* under *Is this filing for an existing case?* in *Step 1 – Case Type*. You can also click on the *+ icon* under the *Action* column on the *Completed Filings* page next to the case matter.



# STEP 1 – CASE TYPE

All fields in Step 1 will be auto-populated. Verify the information. You will be able to amend the *Payment Account*, *Attorney*, or *Client Matter ID*. Click *Next* to move to Step 2 – Parties.

### 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 *
Yes	Adverse Possession (\$165.00)
Case Number	Payment Account *
	Mastercard Account
Jurisdiction *	Attorney *
Baltimore County Circuit Court	KAREN AUTHEMENT
Case Category *	Client Matter ID *
Civil	abc123

Next

# STEP 2 - PARTIES

The case parties will also be auto-populated. If you needed to add any additional case parties, you can do so via *Add Party*.

List of Parties  
Total Case Parties: 5

Sending Party	Party Type	Party Name	Lead Attorney	Additional Attorneys	Actions
<input checked="" type="checkbox"/>	Defendant	Fred Weber			
<input checked="" type="checkbox"/>	Defendant	John Doe 2			
<input type="checkbox"/>	Defendant	John Doe 1			
<input type="checkbox"/>	Defendant	Macerich Company			
<input type="checkbox"/>	Plaintiff	Albert Ramirez			

You can add additional case parties if needed

# STEP 2 – PARTIES (continued)

Add Party will open a dialogue box. Enter the necessary information. Click Add Party to add them to the list. Make sure to select a *Sending Party*. Click Next to move to Step 3 – Documents.

**Add a Party**

Party Type (Required)  Lead Attorney  Additional Attorneys  
Multiple attorneys are not allowed in this jurisdiction

Person Or Organization  Person  Organization Is this your client  Yes  No

First Name (Required)  Middle Name  Last Name (Required)

Address Line 1

Address Line 2

City  State  Zip Code

Phone Number  Date Of Birth

Drivers License Type  Drivers License State  Drivers License Number

Social Security Number  Interpreter

Sending Party	Party Type
<input checked="" type="checkbox"/>	Defendant
<input checked="" type="checkbox"/>	Defendant
<input type="checkbox"/>	Defendant
<input type="checkbox"/>	Defendant
<input type="checkbox"/>	Plaintiff

# STEP 3 - DOCUMENTS

Please refer to the next slides for screenshots illustrating the information below.

1. Select the *Filing Type* – *File*, *File and Serve*, or *Serve*.



The screenshot shows a dropdown menu titled "Filing Type". The current selection is "File and Serve". The dropdown is open, showing a list of options: "File", "File and Serve", and "Serve". A red arrow points to the "File and Serve" option in the dropdown list.

2. Either *Choose Lead Documents* or *Drag & Drop* the documents for the filing.  
**Multiple documents** can be added at once for efficiency.
3. To make a change to any of the documents once uploaded, click on *Add/Manage Document(s)*.
4. Make sure to add the party who is *Responsible for Filing Fees*.
5. If you want to send notifications of this filing, add emailing address to the *Send Accepted Notifications To* field.

# STEP 3 - DOCUMENTS (continued)

**Case Details**

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

Filing Type: Select Filing Type File

Documents to File: Add Documents here

Choose Lead Documents or drag them in here .pdf/.rtf/.doc/docx

0 Bytes  
Max Envelope Size: 100 MB  
0 Lead Document(s)

Filing Code	Filing Type	File Size	Description
<span>Add/Manage Document(s)</span>			

\* indicates a required field.

Responsible for Filing Fees \* To make any updates or changes once uploaded, select Add/Manage Document(s)

Send Accepted Notifications To: (Optional Field. Add email address for each recipient you want to receive accepted notifications.)

example@example.com, example@example.com If you needed Notifications sent, enter email addresses here.

Return Date Not available for selected jurisdiction.

Back    Next

# STEP 3 - DOCUMENTS (continued)

Name	Status	Date modified	Type
Sample Attachment - Copy	✓	10/19/2021 2:29 PM	Microsoft Word
Sample Attachment	✓	10/19/2021 2:29 PM	Microsoft Word
Sample civil Case cover sheet	✓	8/3/2021 10:00 AM	Microsoft Word
Sample Complaint	✓	5/13/2021 9:34 PM	Microsoft Word
Sample Complaint	✓	5/7/2021 10:00 AM	Microsoft Word
Sample Compliant	✓	5/7/2021 10:00 AM	Microsoft Word
Sample Declaration	✓	8/2/2021 10:00 AM	Microsoft Word
Sample Motion	✓	5/13/2021 9:34 PM	Microsoft Edge P
TEST DOCUMENT	✓	7/30/2021 9:54 PM	Microsoft Word

STEP 3 - Documents

Documents to File

Choose Lead Documents or drag them in here  
.pdf/.rtf/.doc/docx

32.09 KB  
Max Envelope Size: 35 MB  
1 Lead Document(s)

# STEP 3 - DOCUMENTS *(continued)*

Documents to File

Choose Lead Documents or drag them in here  
.pdf/.rtf/.doc/docx

Click on *Choose Lead Documents* as another bulk eFiling option

32.09 KB  
Max Envelope Size: 100 MB  
1 Lead Document(s)

Sample Motion.pdf  
Size: 31.39 KB

1. Select the Filing Code
2. Select the Filing Description (e.g., Motion)
3. Select the Document Category
4. +Add Note to Clerk and + Optional Services, if needed
5. Click Save

NOTE: Uploaded Word documents will automatically be converted to pdf.

+ Optional Services

Filing Code\*  
Select Filing Code

Filing Description (Maximum 200 characters)\* ⓘ  
Sample Motion

Document Category\*  
Select Document Category

+Add Note to Clerk

# STEP 3 - DOCUMENTS (continued)

Once you've entered the information for **each document uploaded**, it will bring you back to the Documents tab. Select the party *Responsible for Filing Fees* and any *Notifications*, if desired. Click *Next* to move to Step 4.

Case Details

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

Filing Type  
File

Documents to File  
Choose Lead Documents or drag them in here .pdf/.rtf/.doc/docx

32.09 KB  
Max Envelope Size: 100 MB  
1 Lead Document(s)

Filing Code	Filing Type	File Size	Description
Complaint	File	32.087 KB	Sample Complaint

Add/Manage Document(s)

\* indicates a required field.

Responsible for Filing Fees \*  
Test Tester

Send Accepted Notifications To: (Optional Field. Add email address for each recipient you want to receive accepted notifications.)  
fakelawfirm@lawfirm.com

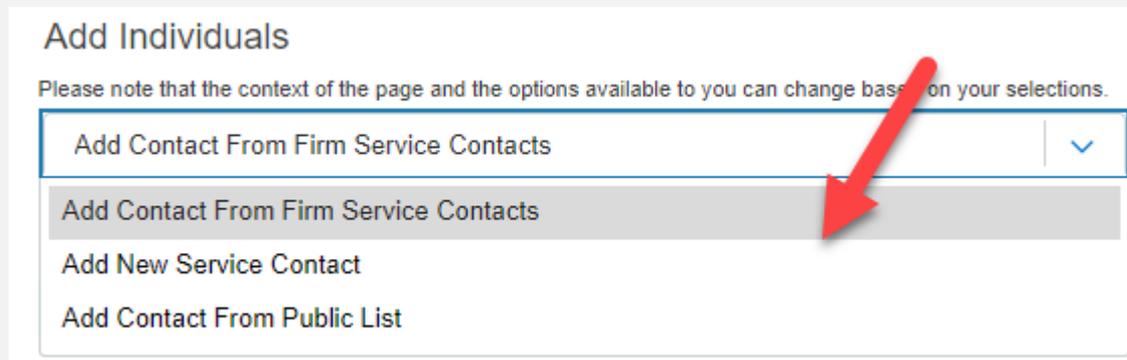
Return Date Not available for selected jurisdiction.

Back    Next

# STEP 4 – SERVICE CONTACT

If you selected *File & Serve* or *Serve* in the Filing Type on Step 3 – Documents, the system will move you to Step 4- Service Contact. Please follow these instructions.

To add to your service list, select one of these three (3) choices: *Add Contact From Firm Service Contacts*, *Add New Service Contact*, or *Add Contact From Public List* from the drop-down menu under *Add Individuals*.



The screenshot shows a web interface titled "Add Individuals". Below the title is a note: "Please note that the context of the page and the options available to you can change based on your selections." Below this note is a dropdown menu with four options: "Add Contact From Firm Service Contacts", "Add Contact From Firm Service Contacts", "Add New Service Contact", and "Add Contact From Public List". A red arrow points to the first option, "Add Contact From Firm Service Contacts".

# STEP 4 – SERVICE CONTACT (continued)

Selecting *Add Contact From Firm Service Contacts*, will display Firm Service Contacts (members of the firm that have been added under Service Contacts). Click on *Add to List* to add them to the Service List.

**Add Individuals**

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

Add Contact From Firm Service Contacts 

First Name

Last Name

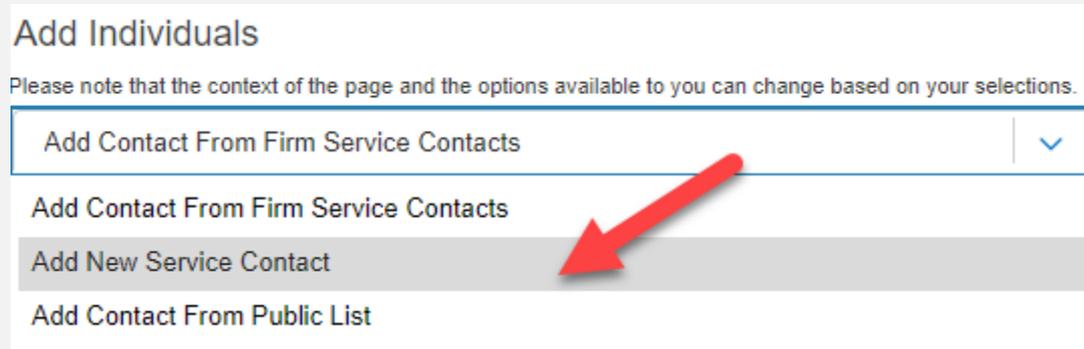
Email Address

Name	Email Address	Action
sc1 sc1	qaefsp+sc1@gmail.com	<a href="#">Add To List</a>
Admin Ca	qaefsp+CAAdmin@gmail.com	<a href="#">Add To List</a>



## STEP 4 – SERVICE CONTACT (continued)

Selecting *Add New Service Contacts*, will prompt you to add their information. Please refer to the next slide for screenshot. Once you select *Save* they will be added to the list of service contacts. Select *Add to List* to add them to the Service List.



# STEP 4 – SERVICE CONTACT (continued)

Selecting *Add New Service Contacts*, will prompt you to add their information.

**Add Individuals**

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

Add New Service Contact ▼

\* indicates a required field.

<b>First Name *</b>	Middle Name	<b>Last Name *</b>
<input type="text" value="Newer"/>	<input type="text"/>	<input type="text" value="New"/>
<b>Email Address *</b>	Administrative Copy	Phone Number
<input type="text" value="nn@lawfirm.com"/>	<input type="text"/>	<input type="text"/>

Address Line 1

Address Line 2

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

Make this contact public



# STEP 4 – SERVICE CONTACT (continued)

Selecting *Add Contact From Public List*, will prompt you to *search* for opposing counsel from an attorney list provided by the Maryland State Bar. Once found, select *Add to List* to add them to the Service List.

**Add Individuals**

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

Add Contact From Firm Service Contacts

Add Contact From Firm Service Contacts

Add New Service Contact

Add Contact From Public List



If you are not adding anyone to the service list, select those service contacts that require service of this transaction by checking the box next to their name.

Who should be notified about this filing?

Current Notice List: Parties will be Served and notified.

Serve	2	Name	Email Address	Service Type	Associated Parties	Action
<input checked="" type="checkbox"/>		Admin Ca	qaefsp+CAAdmin@gmail.com	EServe	Case x	 
<input checked="" type="checkbox"/>		John Doe	qaefsp+JDoe@gmail.com	EServe	Case x	 



# STEP 4 – SERVICE CONTACT (continued)

Lastly, under the column *Service Type*, you have the option to send the documents via eService, Certified Mail (fee), or Mail (fee).

Who should be notified about this filing?

Current Notice List: Parties will be Served and notified.

Serve	2	Name	Email Address	Service Type	Associated Parties	Action
<input checked="" type="checkbox"/>		Admin Ca	qaefsp+CAAdmin@gmail.com	EService	Case ×	 
<input checked="" type="checkbox"/>		John Doe	qaefsp+JDoe@gmail.com	EService	Case ×	 

Add Individuals

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

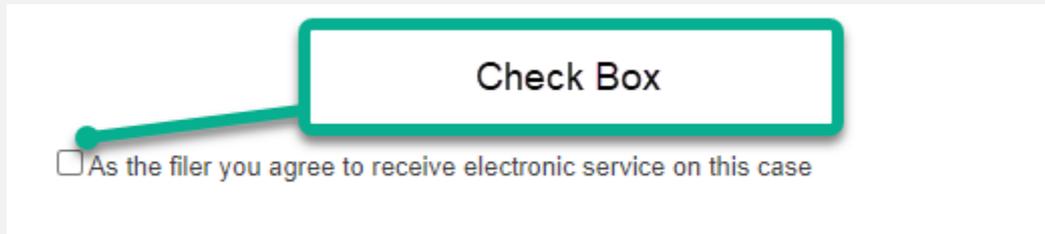
- Certified Mail (\$10.00 Fee)
- EService
- Mail (\$3.00 Fee)

Click *Next* to move to Step 5 – Review & Submit.

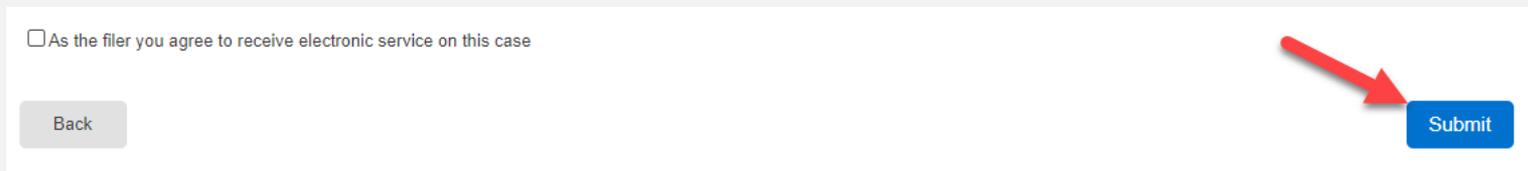
# STEP 5 – REVIEW & SUBMIT

This Step will allow you to review each Step prior to submission to the Court. There is an *edit icon*  next to each section/Step if you need to make any changes.

There is a *check box* prompting you to select *As the filer you agree to receive electronic service on this case*. Screenshot is below.



Once you are satisfied, click *Submit*.



The *Completed Filings* page allows you to perform many tasks to manage your case matters, including,

1. Search Capabilities, Reports (refer to screenshot on next slide)
2. Obtain Process Service, Skip Trace, or Courtesy Copies (***where available***)
3. View your Transaction Summary
4. Cancel your Transaction – *prior* to clerk review
5. File into an Existing Case
6. View Service Contact Report (whether service contacts opened the documents)
7. Manage Service Contacts

# COMPLETED FILINGS (continued)

## Completed Filings

+ New Case

+ Existing Case

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

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

Go

Clear All

Search capabilities, Report Options (see, next slide)

### Report Type

Report Type

Daily Docket

Case History

Docket Search

Transaction Status

## 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.

# COMPLETED FILINGS (continued)

Search Results

Need [process service](#), [skip trace](#) or [courtesy copies](#) ?

Show  filings per page

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
213375	Albert Ramirez vs Macerich Management/dismissed	01CECG00921	Fresno - Civil	02/18/2022	Admin Ca	

Where available, simply click to begin the process

Icons

Here, you can view the icons that help streamline your case matters.

Transaction Summary

Cancel Entire Envelope

Action  
File Subsequent Filing

Action  
Service Contact Report

Action  
Manage Service Contacts

# COMPLETED FILINGS (*continued*)

The *Completed Filings* page also allows you to search for **submitted filings** that you, or one of your colleagues, submitted. This option can be found under the *Sort By* drop-down menu.

Completed Filings

+ New Case + Existing Case

Please note that the context 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

Sort By

Sort By

My Filings

My Firm's Filings

# LOCATING YOUR FILE-STAMPED DOCUMENTS

Once you receive the *Accepted* notification from Maryland Odyssey File and Serve, you will be able to view your file-stamped document within FSMD. Here's how to find it:

1. Go to the *Completed Filings* page
2. Find the recently accepted transaction
3. Click on the *eyeball* icon
4. Scroll down to the Documents section and find the *Stamped Document* column. The link to your file-stamped document will be there. This link will remain available to view at any time.

Documents									
Status	Filing Code	Filing Description	Original Document	Converted Document	Stamped Document	Optional Services	Document Category	Document Description	Fees
Accepted 04/19/2017 01:21:43 P M	Complaint (Lead Document) <b>Note to Clerk:</b>	Complaint	Generic Sample Complaint.pdf		 Generic Sample Complaint.pdf		Non-Confidential	Complaint	\$ 0.00

# REVIEWING YOUR TRANSACTION SUMMARY

You will be able to print the transaction summary for your records by clicking *Printable Version*. Additionally, you will be able to update the Client Matter ID on this screen. This is helpful when you file a new case and enter a “placeholder” Client Matter ID and once it comes back as *Accepted*, you can then put the assigned Client Matter ID for future reference and filings.

Please refer to next slide for screenshots for a visual representation of these items.

# REVIEWING YOUR TRANSACTION SUMMARY (continued)

Envelope ID:213375

## Case Type

Jurisdiction: [REDACTED]

Case Category: Civil - Unlimited

Case Type: Other PI/PD/WD

Payment Account: Mastercard Account2

Attorney: att1 att1

Case Number: [REDACTED]

Hearing Date is not available in this jurisdiction

Client Matter ID: 1 

Date Filed: 02/18/2022 09:33:09 AM



Client Matter ID:



# REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS

You may receive a *Return for Correction* or a *Rejected* notification from Maryland Odyssey File and Serve. If you do, here are the steps to follow to correct and re-submit the document(s).

1. Go to the *Completed Filings* page.
2. Find the transaction with the *red arrow* (or, *back arrow*).
3. Click on the *red arrow* to open the transaction.
4. Once opened, continue through the steps, upload the amended documents and re-*Submit* to the court.

Search Results

Need [process service](#), [skip trace](#) or [courtesy copies](#) ?

Show  filings per page

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
248385 	1 PERSON Vs. ORGANIZATION			10/05/2021	Admin 0730	   
248384 	1 PERSON VS. ORGANIZATION			10/05/2021	Admin 0730	    

# INCOMPLETE FILINGS

You can log out of FSMD in the middle of a transaction and finish it later.

1. Select *Incomplete Filings* under the *Filing* drop-down menu.
2. Find the transaction you need to complete and submit; **or**, to remove completely. You can complete this step, or if needed, one of your colleagues can complete it for you. Find the transaction you need to complete and submit; **or**, to remove completely. You can complete this step, or if needed, one of your colleagues can complete it for you. Under the *Sort By*, select *My Filings*, or *My Firm's Filings*. Additional screenshots are on the next slide.

Incomplete Filings

+ New Case + Existing Case

Sort By: Sort By My Filings

Jurisdiction: Select Jurisdiction

From Date (mm/dd/yyyy): mm/dd/yyyy

To Date (mm/dd/yyyy): mm/dd/yyyy

Go

Sort By

Sort By My Filings

Sort By My Firm's Filings

# INCOMPLETE FILINGS (continued)

Inbox **Filing** Firm Admin

- Submit a New Filing
- Completed Filings
- Incomplete Filings**

+ New Case + Existing Case

Sort By  
Sort By My Filings

Jurisdiction  
Select Jurisdiction

From Date (mm/dd/yyyy)  
mm/dd/yyyy

To Date (mm/dd/yyyy)  
mm/dd/yyyy

Go

### Search Results

Show 25 filings per page

Search

Jurisdiction	Case Name	Case Number	Created on	Created By	Action
			03/05/2022	Admin Ca	 