

### **ELECTRONIC FILING (E-FILING) INSTRUCTIONS** **FOR COOK COUNTY:**

In accordance with an Illinois Supreme Court order entered January 22, 2016, all required Guardianship accountings and reports in Illinois will no longer accepted in person or by mail, but rather must be filed electronically, online. That is, if reports and accountings are required, they must be filed electronically as of January 1, 2018. Certain counties were granted extensions and paper filing will still be accepted beyond January 1, 2018. Specifically, the counties of Cook, DeKalb, Madison, McHenry, and Winnebago will still accept paper reports and accountings until July 1, 2018. DuPage County has an extension to tie into the Odyssey program until July 1, 2019.

Please note that before any electronic filing, you **must** complete and sign the annual report as well as scan and save the signed Annual Report as a pdf. Once the annual report is scanned and saved, please see the electronic filing instructions for Cook County below:

1. CHOOSE A PROVIDER.
  - a. Illinois has 9 different providers to choose. They all have advantages and disadvantages. Below are the instructions for Odyssey but if you want, you may choose another provider. This provider does not charge for the filing of an annual report as the report is a no-fee filing.
  - b. Odyssey website: **[illinois.tylerhost.net/ofsw eb](http://illinois.tylerhost.net/ofsw eb)**
  - c. IF NOT A FIRST TIME FILER, GO TO #4.
  
2. Register with Odyssey - **ONLY FOR FIRST TIME FILERS.**
  - a. Go to **[illinois.tylerhost.net/ofsw eb](http://illinois.tylerhost.net/ofsw eb)**
  - b. Click on the "Register" link in the middle of the screen (it has a green box around a picture of a pen and paper).
  - c. Complete all the boxes on the "Register" page. Please create a password that you will remember. The password must consist of at least one upper case letter, one lower case letter and a number or a symbol. Then click on "Next".
  - d. On the next Register page, select the "Self Representative" box in the middle of the screen and click on it. In a more detailed smaller screen still on the same page, input your contact information (address, country, city, state, zip, phone number) then click "Next".
  - e. On the next page, read the agreement and click on a box next to, "I agree, create my account".
  - f. The next page should say, "Congratulations, you have successfully registered." Your email address will be posted on the page along with a

message stating that, "A verification email has been sent to you. Click on the link inside the email to complete the verification process".

- g. Go to your email and click on the link in the verification email to activate your account.
  - h. Once activated, the program will take you to a website where you can sign-in, Click on the "Sign In Now" link.
  - i. Input your email address and password then click "Next".
  - j. On this page, input your payment account information. Click on the "Actions Menu" in the top right hand corner. Select "Payment Account" then select "Add Payment Account", name the payment account in the box provided. A drop down menu will appear and choose payment type. We recommend choosing the "credit card" option. Input your credit card information, click "Submit" then click "Save". Even though this is a no fee filing, the program needs the payment information as a precautionary measure. **THIS IS A NO FEE FILING AND YOUR CREDIT CARD WILL NOT BE CHARGED.**
3. **File Annual Report - ONLY FOR THE FIRST TIME FILERS WHEN THERE HAVE BEEN NO PRIOR ELECTRONIC FILINGS ON A CASE. IF PRIOR ELECTRONIC FILINGS GO TO #4 BELOW.**
- a. If already logged in, click on "Actions" on top right corner then select "File into Existing Case" link.
  - b. A box will drop down asking for the location. Click on "Cook County - Probate - District 1 - Chicago".
  - c. Search for your case via case number. Use only the last 2 numbers of the year followed by the letter "P" then the numbers. Do not use any spaces then select "File into Case".
  - d. If there has not been prior efilings on this case, the program will ask you to input the case information. The following message will be seen: "You are attempting to efile on a case that is not submitted electronically in Odyssey File & Serve and is not searchable from the court's case management system. You will be able to file in this case but you will have to manually input the case information." Click on the blue "FILE INTO AN EXISTING CASE" link. **YOU WILL ONLY SEE THIS THE FIRST TIME WHEN THERE ARE NO PRIOR EFILINGS IN THE PROBATE CASE.**
    - i. In the "Select Category", select "Disabled".
    - ii. In the "Case Type", select "Guardianship for Disabled - Person" then click "Save Changes".
    - iii. In the Party Information section, you will be inputting all the parties names and contact information. The "Party Type" for a person with a disability is "Estate Name". Input the contact information for the person with a disability. Lead Attorney, click on "Pro Se" then click on "Save changes". Add Another Party by clicking on the "Add Another Party" link on the right side of the web page. Input the guardian's information as "Petitioner" under "Party Type". If there are co-guardians, repeat for the co-guardian's information. Once all the information for the parties are saved, then go to the "Filings" section.
  - e. "Filings" section.
    - i. Under "Filing Type", click on "Efile".
    - ii. Under "Filing Code", click on "Annual Report Filed". You can type in "Annual Report" for "Filing Description" section, skip Client Reference

- Number and Comments to the Court. In the “Courtesy Copies” box, input [“email@rubinlaw.com”](mailto:email@rubinlaw.com).
- iii. Under “Lead Document”, click on the up arrow and select the scanned signed annual report that is saved on your computer and upload.
  - iv. Click “Confidential”, leave “Attachments” and “Optional Services and Fees” blank then then click “Save Changes”.
  - v. Under “Fee”, select credit card on file and the responsible party’s name for the credit card then click “Summary”.
  - vi. On the next page, review all the information listed to confirm that it is correct, then click “Submit”.
  - vii. You will get a confirmation email that the filing is submitted and being reviewed.
4. **File Annual Report - FOR FILERS OTHER THAN FIRST TIME FILERS WHERE THERE HAS BEEN PRIOR ELECTRONIC FILINGS ON A CASE.**
- a. Sign in to [illinois.tylerhost.net/ofswab](https://illinois.tylerhost.net/ofswab) by clicking on the blue box with the lock in the middle of the box then click on the second option in the “New Filing” box which is a the blue link titled “File in Existing Case”.
  - b. The next screen is “File Into Existing Case”.
    - i. In the “Select Location”, Select “Cook County - Probate - District 1 - Chicago”.
    - ii. Input the Case Number. Use only the last 2 numbers of the year followed by the letter “P” then the numbers. Do not use any spaces then select “File into Case”.
    - iii. Your case should be listed with a black “Actions” link and a down arrow on the right hand side. Click on the down arrow and a drop down menu will appear. Click on “File into Existing Case” and your case will pop up.
  - c. Scroll down to “Filings” section.
    - i. Under “Filing Type”, click on “Efile”.
    - ii. Under “Filing Code”, click on “Annual Report Filed”. You can type in “Annual Report” for “Filing Description” section, skip Client Reference Number and Comments to the Court. In the “Courtesy Copies” box, input [“email@rubinlaw.com”](mailto:email@rubinlaw.com).
    - iii. Under “Lead Document”, click on the up arrow and select the scanned signed annual report that is saved on your computer and upload.
    - iv. Click “Confidential”, leave “Attachments” and “Optional Services and Fees” blank then then click “Save Changes”.
    - v. Under “Fee”, select credit card on file and the responsible party’s name for the credit card then click “Summary”.
    - vi. On the next page, review all the information listed to confirm that it is correct, then click “Submit”.
    - vii. You will get a confirmation email that the filing is submitted and being reviewed.
  - d. If the annual report is accepted, a link to that file stamped copy will be included in the email. Please download the file stamped document, save a copy.
  - e. If the annual report is rejected, the email will tell you why the filing was rejected and how to correct the issue.