

ELECTRONIC FILING (E-FILING) INSTRUCTIONS FOR MCHENRY COUNTY:

In accordance with an Illinois Supreme Court order entered January 22, 2016, all required Guardianship accountings and reports in Illinois will no longer be accepted in person or by mail, but rather must be filed electronically, online. That is, if reports and accountings are required to be filed, they must be filed electronically as of January 1, 2018. These are the instructions for Tyler host Odyssey website only.

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

1. Register with Odyssey - **ONLY FOR FIRST TIME FILERS. IF NOT A FIRST TIME FILER, GO TO #3.**
 - a. Type or click on the following link:
efileil.tylertech.cloud/OfsEfsp/ui/landing.
 - b. Click on the "Register" link in the lower right hand corner of the screen in the box labeled, "Registration for an Individual Account."
 - c. Type in your "Account Credentials" which include your email address and password. Please create a password that you will remember. The password must consist of at least one UPPER case letter, one lower case letter **and** at least one number or a symbol.
 - d. Type in your "User Information" in the boxes provided for your contact information.
 - e. Accept the terms and conditions by clicking on the box next to, "I agree to Terms and Conditions." Then click on the "Register" link.
 - f. You will receive an email with a link to confirm the email address with which you registered. Please click the emailed link before signing in.
 - g. Once activated, return to efileil.tylertech.cloud/OfsEfsp/ui/landing and click on the "Sign into your account" link on the upper left hand side of the website. Insert your username (email address) and password to enter the program then click "Sign in."

- h. If you are a first time user, then you will need to add your credit card. The program will have a window pop up requesting you to "...finish setting up your account" with a link to "Add a Payment Account."
- i. Click on that link which will take you to another window, "Payment Accounts."
- ii. On the Payment Account window, click the "+ Add account" then in the "* Account Name" box, type your name; and in the "* Payment Type" click on the down arrow and select one of the options (credit card, waiver, or bank account) then click on the link, "Enter Information."

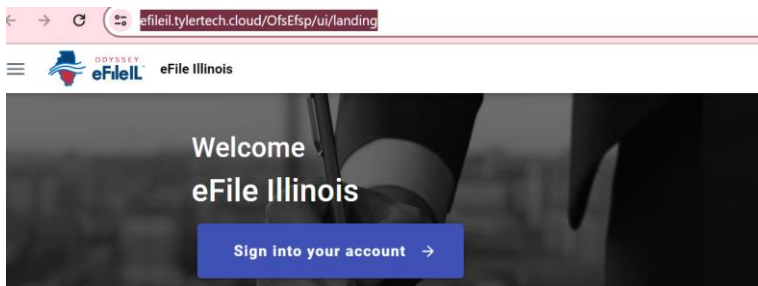
- iii. The following instructions are **only** for a credit card payment account. In the next window, please click on the circle before the words, "Credit Card" for the "Method of Payment" section. Insert your credit card information then click on "Continue." Verify Billing Information/Terms and Conditionals will pop-up, click Save Information. American Express is not accepted as a payment option. 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.

2. File Guardianship Training Program Certificate - ONLY IF COURT ORDERED

- a. Link to the Illinois Guardianship Training Program
<https://onenet.illinois.gov/page.aspx?item=116920>
- b. See #5 below for efilng instructions for the certificate.

3. File Annual Report -

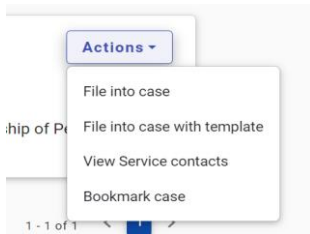
- a. Sign in to efileil.tylertech.cloud/OfsEfsp/ui/landing by clicking on the "Sign In" link in the upper left hand corner and input your email and password and click on "Sign In".



- b. On the next page, click on the “Start Filing” blue link.
- i. On the “Start Filing” page, select the “File into existing case” link.

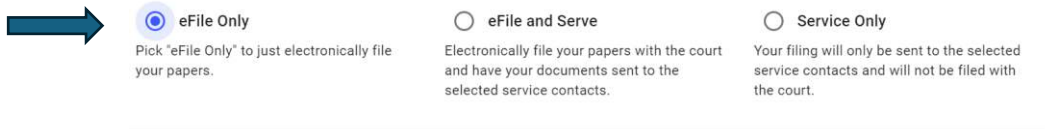
- ii. On the “Search for case” page, in the “*Court Location” box, select “McHenry County.”

- iii. Input the Case Number in the box with the words, “*Case Number.” Type the **last two numbers** of the year immediately followed by **“PR”** (if a 2022 or older case) or by **“GR”** (if a 2023 or newer case) then immediately followed by **a 6 digit number** where the case number compose the last digits and zeros are added to total a 6 digit number, i.e., 20PR000015 or 23GR001115, then click on the blue “Search” box.
- iv. On the next page, your case should be listed with a blue “Actions” link on the right hand side. Click on the “Actions” link and a menu will drop down with the first option being “File into case.” Click on “File into case.”



v. The next two (2) pages list the “Case Information” and “Parties”, nothing to be done on these pages.

vi. On the “Filings” page, click on the “+Add Filing” which will take you to the next page. Please click on the bubble before the words, “eFile Only.”



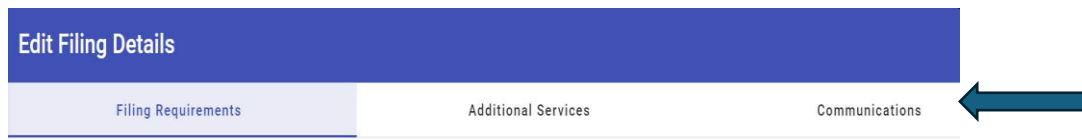
vii. In the Filing Information section, click on the down arrow in the box labeled, “*Filing Code,” type and click on “Guardian for Disabled Adult Report.”



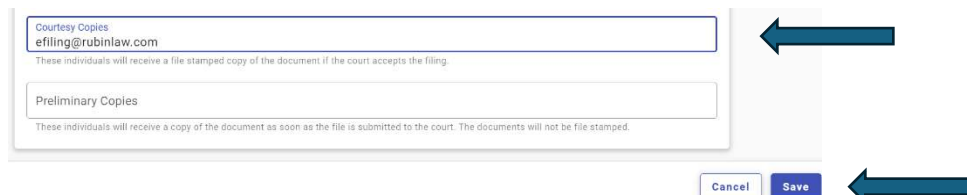
viii. In the “Filing Description” box, type “Annual Report” or i.e., 2023 Annual Report, no need to insert information in the “Client Reference Number” or in the “Comments to Court” box.

ix. In the “Upload Documents” section, in the box “Lead Document” either drag the completed signed Annual Report or click on the “Select File” link. Your Annual Report will be uploaded and on the right hand side in the “*Security” box, click on the down arrow and select “Non-Confidential.”

x. **Follow 3. b. x. and xi. for Rubin Law clients only, before** clicking on the blue “Save” button, click “Communications” on the upper right hand corner of the page. This will allow you to send courtesy copies to Rubin Law.



xi. In “Courtesy Copies” box, type efiling@rubinlaw.com, and Rubin Law will receive a courtesy copy of the file stamped report once approved. Then click on the “Save” button.



- xii. On the next page, click on the "Skip to fees" link on the bottom right hand side (even though the "Service" link is the blue link).
 - xiii. On the "Fees" page in the "**Payment Account" box, choose your credit card as the *Account Name type you previously provided; in the "**Filing Party" drop down menu, click on your name then click "Review and submit ->" on the bottom right.
 - xiv. Confirm that all the information looks correct, then at the bottom of the screen click on the blue box, "Submit ->."
4. The Annual Report will be submitted to the clerk's office and the clerk's office will either send you an email accepting or rejecting the Annual Report. If the Annual Report is rejected, the clerk's office will let you know why the Annual Report is rejected. If the Annual Report is accepted, Odyssey will email you a copy file stamped copy.

For Rubin Law clients only, if you included efiling@rubinlaw.com in box under the words, "Courtesy Copy" (3. b. xi. above), Rubin Law will receive an email with a file stamped copy of the Annual Report as well. If you did not type in efiling@rubinlaw.com, please email a copy of the file stamped Annual Report to Rubin Law to be placed in Rubin Law clients' records.

5. Efiling Guardianship Training Program Certificates - Once you have completed the Illinois Guardianship Training program and received your certificate, follow the same steps above in #3, except for 3.b. vii-ix. which instructions are revised below specifically for filing the certificate:
- a. In the Filing Information section, click on the down arrow in the box labeled, "**Filing Code," type and click on "Certificate."
 - b. In the "Filing Description" box, type "Guardianship training program certificate," no need to insert information in the "Client Reference Number" or in the "Comments to Court" box.
 - c. In the "Upload Documents" section, in the box "Lead Document" either drag the Guardianship Training Program Certificate or click on the "Select File" link then select the certificate. Your certificate will be uploaded and on the right hand side in the "**Security" box, click on the down arrow and select "Non-Confidential."
6. Inventory - If you are filing an Inventory, the same instructions are followed in #3 above, except for 3.b. vii-ix., with the revised instructions specifically for filing an Inventory:
- a. In the Filing Information section, click on the down arrow in the box labeled, "**Filing Code," type and click on "Inventory."
 - b. In the "Filing Description" box, type "Inventory" no need to insert information in the "Client Reference Number" or in the "Comments to Court" box.
 - c. In the "Upload Documents" section, in the box "Lead Document" either drag the Inventory or click on the "Select File" link then select the certificate. Your Inventory will be uploaded and on the right hand side in the "**Security" box, click on the down arrow and select "Non-Confidential."
7. Annual Accounting - If you are filing an Annual Accounting, the same instructions are followed in #3 above, except for 3.b. vii-ix., with the revised instructions specifically for filing an Annual Accounting:
- a. In the Filing Information section, click on the down arrow in the box labeled, "**Filing Code," type and click on "Accounting."

- b. In the "Filing Description" box, type "Accounting" no need to insert information in the "Client Reference Number" or in the "Comments to Court" box.
- c. In the "Upload Documents" section, in the box "Lead Document" either drag the Accounting or click on the "Select File" link then select the accounting. Your accounting will be uploaded and on the right hand side in the "*Security" box, click on the down arrow and select "Non-Confidential."
- d. There will be a fee for filing an Accounting.