

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. Even though Illinois is requiring Annual Reports to be efiled, Cook County is requiring that original Annual Reports be sent to the judge. We recommend efiled the Annual Report then sending an efiled stamped report along with the original signed Annual Report to the judge.

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 as Cook County is only currently working with Odyssey and no other provider. If, in the future, you want to choose another provider, you may. Please note that Odyssey does not charge for the filing of an annual report as the report is a no-fee filing while there may be other providers that do charge.
 - b. Odyssey website: **illinois.tylerhost.net/ofswb**
 - c. IF NOT A FIRST TIME FILER, GO TO #3.

2. Register with Odyssey - **ONLY FOR FIRST TIME FILERS.**
 - a. Go to **illinois.tylerhost.net/ofswb**
 - 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 -
- a. Sign in to illinois.tylerhost.net/ofswb 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. Search for your case via case number. Please type in the full year immediately followed by "P" immediately followed by a 6 digit number. If there are not six digits, type a "0" after the "P" but before the numbers to complete the six digits, i.e. 2018P000001, then select "Search".
 - 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 Case" and your case will pop up.
 - c. No information should be changed after the first heading entitled, "Case Information".
 - d. Scroll down to the second heading entitled, "Case Cross Reference Number".
 - i. In the white box under the words, "Case Cross Reference Number", please input "99500". That is the Cook County code identifying that a guardian is filing a report rather than an attorney filing a report.
 - ii. In the white box under "Case Cross Reference Type", please select, "Cook County Attorney Code/Self-Represented Litigant Code" then

- click on the link that has a plus sign in a circle followed by the words, "Add Case Cross Reference Number" on the right hand side.
- iii. Click on "Save Changes".
 - e. There are no changes under the heading, "Party Information".
 - f. Scroll down to the next heading, "Filings".
 - i. The first box under "Filing Type", click on the arrow on the right hand side then click on "Efile".
 - ii. In the second box under "Filing Code", click on "Annual Report Filed". You can type in "Annual Report" for the next box under the words, "Filing Description". Skip the boxes under the words, "Client Reference Number" and "Comments to the Court". In the box under the words, "Courtesy Copies", input efiling@rubinlaw.com.
 - iii. Under the words, "Lead Document", click on the up arrow in the middle of the box and select the scanned signed annual report that is saved on your computer and upload.
 - iv. Click on the arrow toward the right hand side of the box under the words, "Security" then click "Confidential", leave "Optional Services and Fees" blank then click "Save Changes".
 - g. Scroll down to the heading, "Fees" and select the credit card on file by clicking on the arrow on the right hand side of the box below the words, "Payment Account", clicking on the arrow on the right hand side of the box below the words, "Party Responsible for Fees" and selecting the person with a disability as the person responsible for the fees.
 - h. Scroll down to the heading, "Submission Agreements" and click on the box on the left hand side just before the words, "IMPORTANT NOTICE".
 - i. At the bottom of the page, click "Summary".
 - i. On the next page, review all the information listed to confirm that it is correct. If you want to confirm that you uploaded the correct document, click on the words, "Annual Report Filed" under the heading, "Filings" then click on the blue words, "Original File" on the right hand side.
 - ii. Once you have confirmed that the information is correct and you have uploaded the correct document, click on "Submit".
 - iii. You will get a confirmation email that the filing is submitted and being reviewed.
 - j. 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.
 - k. If the annual report is rejected, the email will tell you why the filing was rejected and how to correct the issue.
 - l. Save a copy of the efiled annual report as well as print a copy.
4. Mail the original and efile stamped copy of the report to judge. Please mail a copy of the efile stamped report as well as the original signed report to the assigned judge as follows:
- Judge _____
Court room # _____
Richard J. Daley Center
50 West Washington
Chicago, Illinois 60602