

### **ELECTRONIC FILING (E-FILING) INSTRUCTIONS** **FOR LAKE COUNTY 2020:**

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.

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 Lake 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. If, in the future, you decide to choose another provider, keep in mind that other providers may charge a fee for no fee filings.
  - b. Odyssey website: **illinois.tylerhost.net/ofsw eb**
  - c. IF NOT A FIRST TIME FILER, GO TO #3.
  - d. **IF YOU HAVE PREVIOUSLY FILED ON i2file.net, YOUR USER NAME AND PASSWORD WILL BE THE SAME ON ODYSSEY**
  
2. Register with Odyssey - **ONLY FOR FIRST TIME FILERS.**
  - a. Go to **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 there is no fee for filing of an Annual Report, Odyssey requires participants to complete 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](https://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 "Lake County".
    - ii. To search for your case via the case number, input the Case Number in the box under the words, "Case Number". Please type in the last two digits of the year immediately followed by "P" immediately followed by the digit number, i.e. 20P11, then click on the blue "Search" box.
    - iii. On the next screen, 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 the link will take you to the next screen which will have the case number and name of the estate at the top of the screen.
  - c. No information should be changed after the first headings entitled, "Case Information" and "Party Information".
  - d. Scroll down to the third heading entitled, "Filings".
    - i. In box under the words, "Filing Type", click on the arrow on the right hand side and select "Efile" (there are only 3 options).
    - ii. In box under the words, "Filing Code", click on the arrow on the right hand side and select "Report" from the drop down menu.
    - iii. In the box under the words, "Filing Description", type in the description of the Report, i.e. 2020 Annual Report.
    - iv. No need to fill in the boxes under the words, "Client Reference Number" and "Comments to the Court".
    - v. In box under the words, "Courtesy Copies", type [efiling@rubinlaw.com](mailto:efiling@rubinlaw.com), and Rubin Law will receive a courtesy copy of the file stamped report once approved.

- vi. In the box under the word, "Computer" under the "Lead Document" area, click on the up arrow and download the completed signed scanned report from your computer.
  - vii. In the box under the words, "Security", click on the arrow on the right hand side and choose "Confidential".
  - viii. Disregard the boxes under the words, "Attachments" and "Optional Services and Fees" then click on the blue box labeled, "Save Changes".
  - e. Scroll down to the fourth heading, entitled "Fees".
    - i. Select the payment account in the box under the words, "Payment Account".
    - ii. Select the party who is responsible for fees under the words, "Party Responsible for Fees", then click on the blue box labeled "Save Changes".
    - iii. Click on the blue "Summary" box at the bottom. This will take you to another screen.
  - f. Check to make sure that all looks correct, then at the bottom of that 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 and, if you typed in [efiling@rubinlaw.com](mailto:efiling@rubinlaw.com) in the box under the words, "Courtesy Copy" (3.d.v. above), our office will receive an email with a file stamped copy of the Annual Report as well. If you did not type in [efiling@rubinlaw.com](mailto:efiling@rubinlaw.com), please email a copy of the file stamped Annual Report to my office for your records. Thank you.