Professional Responsibility Board eFiling Guide

EFSP v1 October 2026

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Introductory Notes

- **Scope of this Filer Guide:** This guide is NOT intended to be a comprehensive guide to use of the eFile & Serve System. It provides supplemental division-specific guidance for eFiling for the Professional Responsibility Board. Detailed instructions about registering and using the eFiling system are available at https://odysseyfileandservecloud.zendesk.com/hc/en-us and additional Vermont-specific user guides and other information and training materials about electronic filing are available on the Vermont Judiciary's website at https://www.vermontjudiciary.org/about-vermont-judiciary/electronic-access/electronic-filing.

- **System Name Updates:** The Vermont Judiciary's electronic case management and electronic filing systems have recently been rebranded by the vendor that produces them (Tyler Technologies), resulting in some updates to the labels by which those systems are known. For the court's case management system, the name "Odyssey" has been replaced by "Enterprise Justice" or "EJ" for short. For the electronic filing system, the name "Odyssey File & Serve" (OFS) has been replaced by "eFile & Serve" (EFS), with our specific Vermont version also being referred to as "eFileVT." It is understood that many internal and external users may still refer to these systems as Odyssey, and that is perfectly acceptable for purposes of communication to the court and among court users. This notice is being provided to offer context as to why the court's updated instructional materials and announcements will no longer reference the "Odyssey" systems. If there are any questions or concerns about these changes, please feel free to reach out to itsupport@vtcourts.gov.

Accessing eFile & Serve

All Vermont Courts have adopted universal eFiling in all dockets through the eFile & Serve system, which is a web-based platform accessible from any modern browser on a computer or mobile device. eFile & Serve can be accessed directly at https://efilevt.tylertech.cloud/OfsEfsp/ui/landing or via a link on the Vermont Judiciary's website's eFiling page at https://www.vermontjudiciary.org/about-vermont-judiciary/electronic-access/electronic-filing

Registration

Registration for eFiling is free and simple. All that is required is a valid email address. There are different registration options for firm/organizational users and independent users such as self-represented litigants. Instructions on how to register are found in the user guides and other materials in the "self-help" section of the eFile & Serve homepage.

Under the efiling rules, a licensed attorney who is self-represented in a proceeding before a hearing panel of the Professional Responsibility Board is not required to efile. V.R.E.F. 3(b)(9).

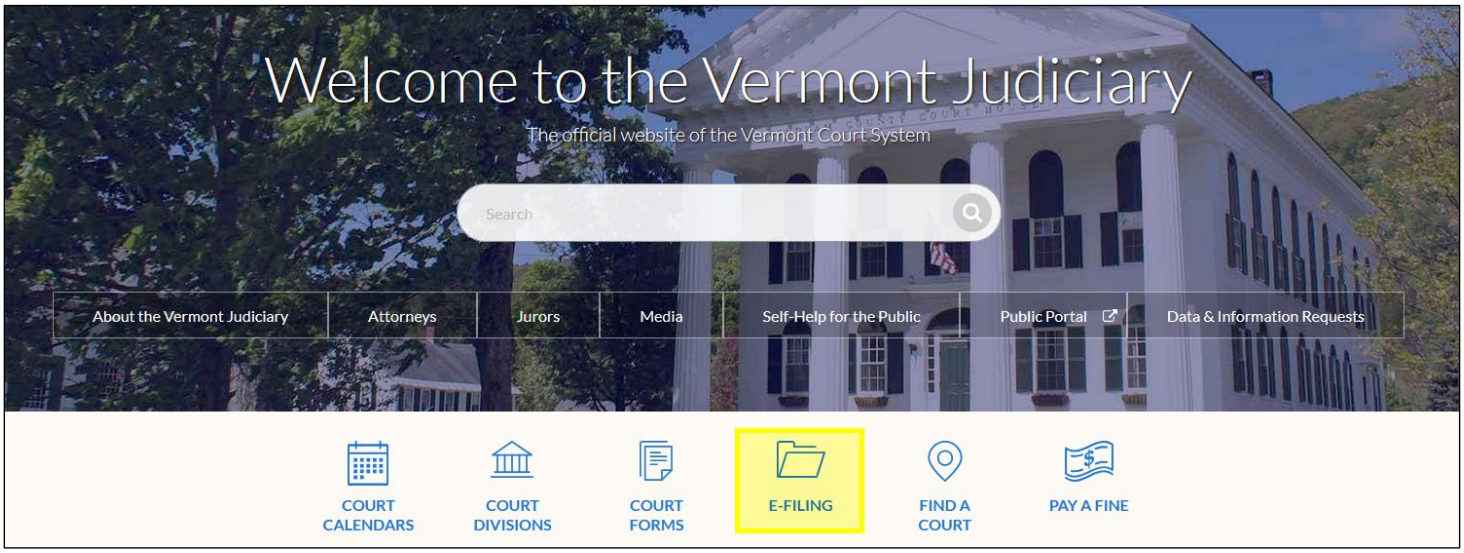
> Note: all users including attorneys and self-represented litigants who choose to eFile must self-register. Court staff cannot complete registrations on behalf of filers or edit any user's registration information.

Training and Support

For general information and questions about use of the eFiling system, on the eFile & Serve homepage https://efilevt.tylertech.cloud/OfsEfsp/ui/landing there are numerous resources:

- Live web training sessions and recorded trainings that can be viewed any time
- A Database of FAQs
- Chat, messaging and other contact options for support
- Training videos
- Downloadable user guides

Vermont-specific guides about filing in various division and case types are on the Judiciary website's eFiling page https://www.vermontjudiciary.org/about-vermont-judiciary/electronic-access/electronic-filing, also accessible here from the homepage:



- There is also a Judiciary eFiling helpdesk for Vermont-specific eFiling procedural questions at EFileSupport@vtcourts.gov *Please use this email for eFiling questions and do not send eFiling questions to the main Judiciary Helpdesk email.*

Filing into Existing Cases

NOTE: Efiling is available on the eFile & Serve platform for matters before Hearing Panels of the Professional Responsibility Board where a case already exists and it has a public status. A new case cannot be initiated through efiling. Please contact prbhearingpanel@vtcourts.gov if you need assistance in filing a new case.

To file into an existing case, while logged into eFile & Serve and on the Dashboard page, select "Start Filing" followed by "File Into Existing Case."

Location: Select Professional Responsibility

Search Options: Select the bubble to search for a case either via the Case Number or by searching the Party Name. A Case Number will bring up one individual case while a Party Name search will bring up any public professional responsibility case.

When the case being searched for appears, click on “Actions” in the top-right of the case followed by “File Into Case” to begin filing into the existing case.

Similarly to filing into any other case, there are sections for Case Information, Parties, Filings, Service, Fees, and a Summary. Case Information and Parties cannot be altered or amended here, however, additional parties can be added.

Filings

- Start by going to the Filings tab and selecting “+ Add Filing.” This will bring you to a section to Edit Filing Details which is split into two sections: Filing Requirements and Additional Services and Fees.
    - Additional Services and Fees is not being used at the Professional Responsibility node at this time.

- **Filing Type**: If using the “eServe” feature (see info in user guides), select “eFile &Serve” or “Serve” from the Filing Type dropdown menu. Otherwise select “eFile Only”. *Please see Vermont eService Guide for details on electronic service.*
- **Filing Information:**
    - **Filing Code**: Select appropriate filing code for filing.
    - **Optional Sections:**
        - Filing Description
        - Client Reference Number
        - Comments to Court

Upload Documents

- Documents being uploaded can either be dragged from a folder and dropped into the gray box in eFile & Serve that says “Drag files here or,” or they can be uploaded by selecting “Select file” under the appropriate section (Lead Document or Attachments), and that will allow you to locate and upload files from a File Upload pop-up.
    - Lead Document – Primary Pleading
    - Attachment – Any and all supporting documents

Notes about Documents:

- Documents must be uploaded in PDF Format.
- Documents **MUST BE FLATTENED** (fillable fields and other embedded objects removed). *Usually accomplished by “printing to PDF”- more detailed instructions available in VT Policy and Procedure Guide)*
- The main document should be uploaded as the “lead” document and other supporting documents should be individually uploaded as separate Attachments.
- Each document uploaded must have a Security type selected, or you cannot proceed.
- Documents containing confidential information such as social security numbers must be labeled as a “Confidential Document” from the Security dropdown menu by

the document. Where required by the new Rules of Electronic Filing, a public redacted version MUST also be filed.

- Under Communications, you may list email addresses for individuals that you wish to receive courtesy copies of the filing.
- Click "Save" in the bottom-right to save the current filing.

Service (for eFile and Serve filings):

- Add service contacts by selecting "Add" and then picking an option from the dropdown menu. You can add yourself, someone from the Party List, someone from a Firm List, someone from a Public List, or choose to Add a New Contact.
    - You may add as many service contacts as you need. Contacts can also be edited or removed by clicking on the three stacked dot icon next to the contact's name and then selecting either "Edit Service Contact" or "Delete Service Contact."
- Select "Fees" in the bottom-right corner to proceed.

Fees

- Either select a payment account from the dropdown menu or add a new payment account.
- If you are filing with an Application to Waive Filing Fees, will need to create a Waiver Account to use for the filing fee, which will waive all filing fees.
- Select the person responsible for fees (The filer is responsible for fees)
    - Filing Attorney – will populate when using Attorney Account
- Click "Calculate Fees" to see a breakdown of the fees for the filing(s).
- Select "Summary" in the bottom-right of the page to continue.

The Vermont Judiciary has a per case filing fee structure for the eFiling system, effective April 1, 2021. The fee structure is the result of a collaborative effort and the culmination the eFiling Fees Study Committee, as well as continued dialogue with the Vermont Bar Association and Tyler Technologies. The case fee is $14.00 per filer or firm, payable upon a party's first filing. Convenience fees amount to a 2.89% processing fee for credit card payments and $1.00 per case for eCheck payments. For any case type where there is no court fee, the party filing will not incur the user fee either.

Please note:

- The per case fee is $14 per party, per filer within a firm, charged once upon first filing. If a party's representation changes from one firm to another, the fee will be charged again upon the new firm's first filing into the case. A pro se litigant who chooses to use the eFiling system is also required to pay the fee upon first filing. If a pro se litigant later seeks representation, the fee would be charged again upon the firm's first filing against the firm's payment account.

- *Some filers may be erroneously re-assessed the $14 charge as a result of merging of system entities in Odyssey (a process to correct duplicate records for the same individual). When a party entity for whom the per case fee has been paid is merged into another entity for whom the fee has not been paid, the fee will assess again. Filers in those situations may contact Tyler Technologies for a refund.*

For the following exemptions, parties must still choose a waiver account when filing:

Statutory or rule exemptions

- Government and appointed filers, pursuant to 32 V.S.A. § 1433 and Rule 10(d)(1) of the Rules for Electronic Filing (2021)
- Stalking & Sexual Assault cases, pursuant to 12 V.S.A. § 5133(f)
- Relief from Abuse cases, pursuant to 15 V.S.A. § 1103(f)
- Abuse Prevention for Vulnerable Adult, pursuant to 33 V.S.A § 6933(b)

As applied economic hardship exemptions

- Fee waiver determination, pursuant to 32 V.S.A. § 1431(h) or 32 V.S.A. § 1434(b) in Probate cases, and
- Fee waiver determination, pursuant to V.R.C.P. 3.1 and V.R.P.P. 3.1

Government agency filers and others who are statutorily exempt from paying filing fees may file via a "waiver" account that can be set up for each registered user. There is a guide to creating a waiver account posted at https://www.vermontjudiciary.org/about-vermont-judiciary/electronic-access/electronic-filing.

A waiver account would also be used by anyone filing an Application to Waive Filing and Service Fees (*formerly IFP/In Forma Pauperis)*. Filers upload the completed application in PDF format along with their other filing(s) and are notified after court review whether the application has been granted. If the request is denied, the filing will still be accepted but the filer will be sent a notice of a deadline for making payment of the appropriate fee.

Case filing fees paid to the Court are established by statute. Current fees and authorizing statutes are available at https://www.vermontjudiciary.org/fees .

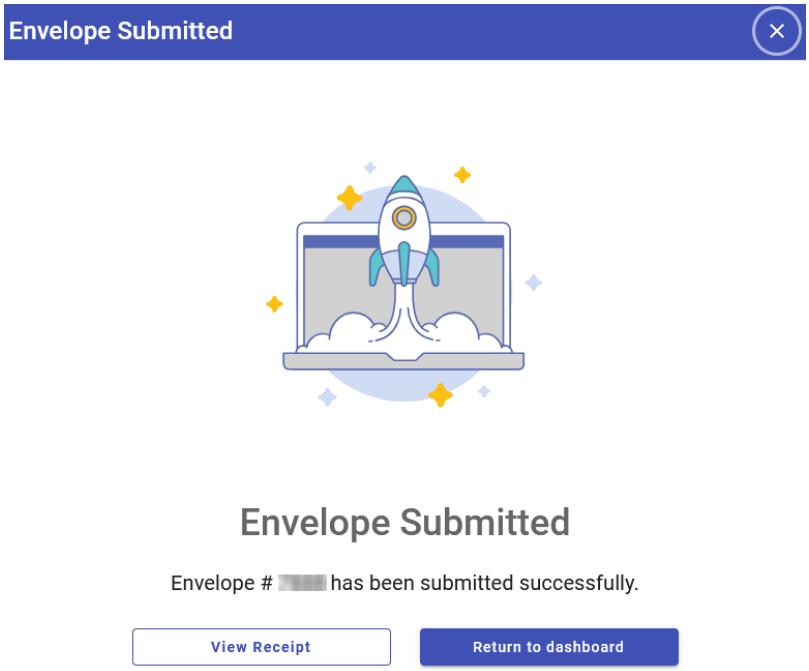
The latest updates and answers to frequently asked questions regarding electronic filing are available on the Judiciary website at https://www.vermontjudiciary.org/about-vermont-judiciary/electronic-access/electronic-filing.

Submission Agreements

In order to submit a filing, boxes must be checked to certify:

1. Compliance with the Rules for Public Access to Court Records
2. Compliance with service obligations under V.R.E.F.

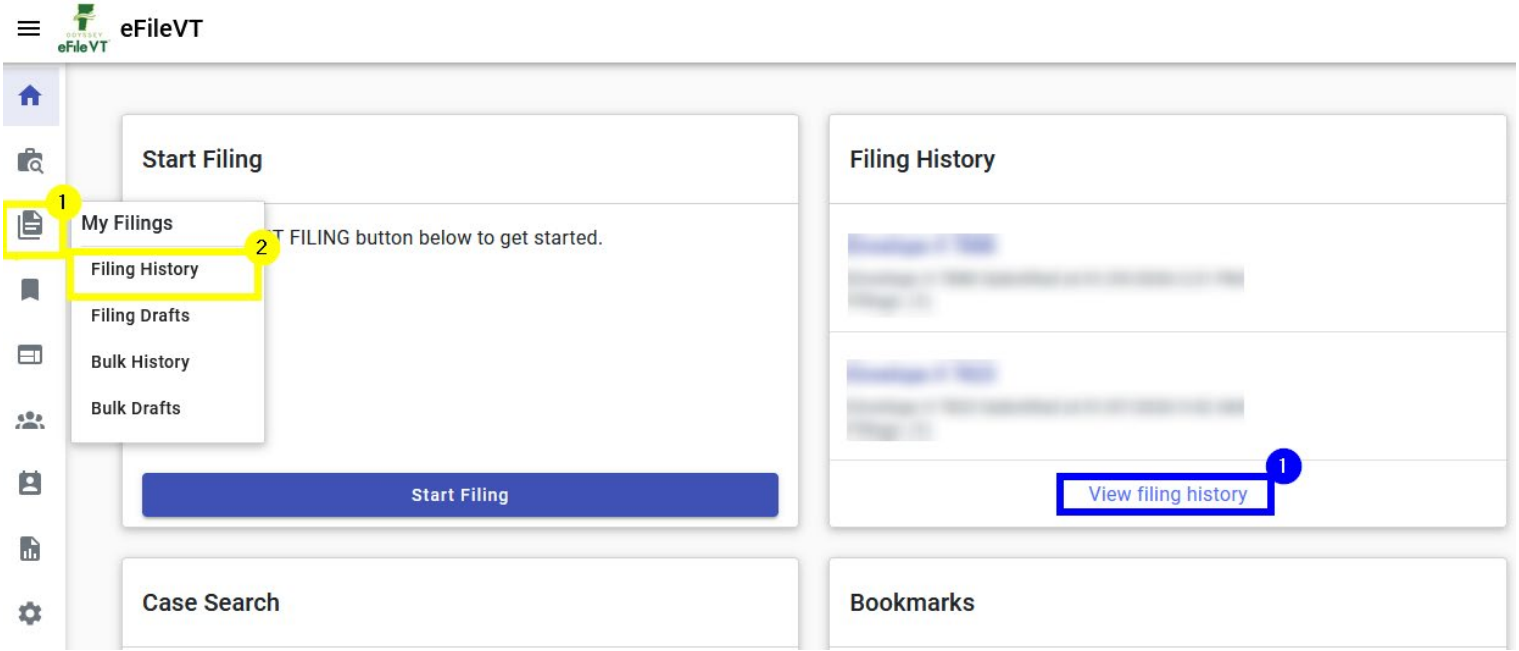
Along with the submission agreement checkboxes, this page also has a summary of the envelope information, including Case Information, Parties, Filings, and Fees. Each section has an Edit button in the top-right of the section that can be clicked to go back and make changes in that particular section. Once the boxes are checked under Submission Agreement and all information looks good in the summary, click on "Submit →" in the bottom-right of the page to submit the filing. Once submitted, there should be a pop-up window in eFile & Serve indicating that the envelope submitted successfully and offering options to either view a receipt of the filing or to return to the eFile & Serve dashboard.



Refiling after Rejection

When a filing is rejected:

- Filer will receive an email with the rejection reason and any comment the court may add
- Filer can see the envelope on the Dashboard of Filer's Account
    - Click on either "View Filing History" in the middle of the dashboard page, or on the "My Filings" icon followed by "Filing History" on the left-side toolbar.



    - Find rejected envelope
        - Locating the envelope can be made easier by changing sort options or changing search filters.
    - Click Actions
    - Click Envelope Details

- If filing was rejected, filer has **7 days** to refile with a correct document in order to retain the original filing date. Process to follow:
    - On the rejected filing click “Copy this envelope

Support and Troubleshooting

Case and docket-specific questions (not specifically about eFiling):
(e.g., which forms to file for a particular case type) please contact court staff.

Technical issues or questions related to the functioning of eFile & Serve:
Please see the resources available in the “Self-Help” section on the eFile & Serve homepage. These resources include live assistance with Tyler Technologies support staff through various methods (phone, email, live chat) as well as a variety of user guides, FAQs and other sources of information.

Vermont-specific eFiling policy and procedure questions: see other resources available on the Judiciary website eFiling page at https://www.vermontjudiciary.org/about-vermont-judiciary/electronic-access/electronic-filing including the Vermont eFile & Serve Policy and Procedure Guide, the eService Guide and other materials.

There is also a dedicated eFiling helpdesk email available at EFileSupport@vtcourts.gov.