



*Because equal access to  
justice is everyone's fight*

## **E-Filing an Adult Guardianship Case**

*(Updated June 2022)*

### **PART A: Choose an Electronic Filing Service Provider**

CVLS prefers and recommends Odyssey E-File as it is completely free and easiest to use. You may access the new Odyssey E-File Dashboard using the following link: <https://efileil.tylertech.cloud/OfsEfsp/ui/dashboard> . If this is your first time e-filing, you must create an account and register. During the registration process, you will be asked for a “law firm number.” You may use your own or CVLS’s attorney code, which is 91139. To waive fees for your client, you will also have to set up a waiver account. Detailed instructions for setting up a waiver account can be found at the following link: <https://tylertech.egain.cloud/kb/ilh5/content/PROD-9580/How-do-you-add-a-waiver-account-H5-9580>.

### **PART B: File Your Initial Documents**

Once your documents are ready to file, go to the Odyssey E-Filing website and log in. After logging in, on the homepage, click “Start Filing.” The next page will allow you to “Start a New Case” or “File into Existing Case.” For a new guardianship filing, you will click on “Start a New Case.” Then, follow these steps:

#### **1. Case Information**

- a. Location: Select “Cook County – Probate – District 1 – Chicago”
- b. Category: Select “Disabled”
- c. Case Type: Select “Guardianship for Disabled – Person”

#### **2. Case Cross Reference Number**

- a. The default is “Cook County Attorney Code” – leave as is
- b. Case Cross Reference Number: Type your attorney code or CVLS’s attorney code (91139)
- c. Click on “Parties →”

#### **3. Party Information**

- a. Enter first and last name of **RESPONDENT**
  - i. **Note, Party Type says “Estate Name.” You will not enter Petitioner’s name anywhere when filing the Petition. Only enter Respondent’s name so the docket reflects the correct ESTATE NAME**
- b. Add/Edit Attorneys – select your name, click “Main Attorney,” click “Save”
- c. Click “Filings →”

#### 4. Filings

- a. In this section, you will file all your initial documents:
  - i. *Petition for Appointment of Guardian of a Person with a Disability* (with a *Probate Division Cover Sheet* attached as the first page and *Exhibit A* attached as the last page)
  - ii. *Civil Legal Services Provider Form*
- b. Filing the *Petition for Appointment of Guardian of a Person with a Disability*:
  - i. Filing Type: Select “EFile Only”
  - ii. Filing Code: Select “Complaint/Petition – Guardianship– Person – Fee – \$379.00”
  - iii. Filing Description, Client Reference Number, Comments to Court, and Courtesy Copies: all optional fields that can be left blank
  - iv. Upload Documents: Upload a PDF version of the *Petition* including the Probate Cover Sheet and Exhibit A
  - v. Security: Select “Non-Confidential”
  - vi. Click “+ Add Filing”
- c. Filing the *CLSP*
  - i. Filing Type: Select “EFile Only”
  - ii. Filing Code: Select “Certificate of Representation by Civil Legal Services Provider Filed”
  - iii. Filing Description, Client Reference Number, Comments to Court, and Courtesy Copies: all optional fields that can be left blank
  - iv. Lead Document: Upload a PDF version of the *CLSP*
  - v. Security: Select “Non-Confidential”
  - vi. Click “Skip to Fees → →”

#### 5. Fees

- a. Payment Account: Select your “Waiver Account” (see Part A for how to create the Waiver Account)
  - i. This should make the filing fee “\$0.00.” If there is anything other than “0.00” in fees when you review the filing – STOP and contact CVLS.
- b. Filing Attorney: Select your name
- c. Filing Party: default is the estate name – leave as is
- d. Click “Review and Submit →”

#### 6. Review and Submit

- a. Check the box for notices and requirements regarding redaction and discovery responsibilities
- b. Review all the information and make sure you have uploaded the correct documents.

- c. Click “Submit” to submit your filings

### **PART C: Set a Court Date**

After filing, the Clerk’s Office will send an e-mail to the e-mail address associated with your e-filing account. This will be your “submitted” e-mail, meaning the e-filing system has received your filings. This does not mean your filings have been accepted. Within 24-48 hours, you will receive a subsequent e-mail for each filing stating whether the filing has been accepted or rejected. If accepted, the e-mail will contain a hyperlink to your file-stamped copy. If any of your filings have been rejected, please contact CVLS for assistance.

After you receive the file-stamped *Petition for Appointment of Guardian of a Person with a Disability* and *CLSP* back with your case number, update the Summons and other court documents, with the case number.

**Your filing should also have a hearing date listed. You can use this date on your Summons and Notice of Motion forms. If no date is listed, follow the steps below to schedule a court date:**

If your accepted filings do not have a hearing date listed, go to the Odyssey E-Filing website and log in. After logging in, click on “Start Filing” and then “File into Existing Case.” Find your case by entering the location and case number. Type the full year and six-digit case number without any spaces (ex: 2020P00XXXX).

Once you have found your case, click the icon that looks like a file folder “File Into.”

Then, follow these steps:

- 1. Case Cross Reference Number**

- a. Add your attorney code and click “Parties →” (see Part B, Step 2)

- 2. Party Information**

- a. Leave section as is
- b. Click “Filings →”

- 3. Filings**

- a. In this section, you will file your remaining documents (*Summons* and *Motion to Waive GAL.*)
- b. Filing the *Summons*:
  - i. Filing Type: Change to “EFile Only”
  - ii. Filing Code: “Summons Issued for Appointment of Guardian for Disabled Person”
  - iii. Lead Document: Upload a PDF version of the *Summons (CCP 201)*
  - iv. Security: Select “Non-Confidential”

- v. Click “+ Add Filing”
- c. Filing the *Motion to Waive GAL*:
  - i. Filing Type: Change to “EFile Only”
  - ii. Filing Code: “Motion Filed”
  - iii. Motion Type: “Motion Hearing – Type Not Listed”
  - iv. Filing Description, Client Reference Number, Comments to Court, and Courtesy Copies: all optional fields that can be left blank
  - v. Lead Document: Upload a PDF version of the *Motion to Waive GAL*
  - vi. Security: Select “Non-Confidential”
  - vii. Click “Skip to Fees → →”

#### 4. Fees

- a. Payment Account: Select your “Waiver Account” (see Part A for how to create the Waiver Account)
- b. Party Responsible for Fees: Select the Respondent’s name
- c. Filing Attorney: Select your name
- d. Click “Review and Submit →”

#### 5. Review and Submit

- a. Check the box for notices and requirements regarding redaction and discovery responsibilities
- b. Review all the information and make sure you have uploaded the correct documents.
- c. Click “Submit” to submit your filings

#### 6. Selecting a Hearing Date

- a. After you click “Submit,” a calendar will pop up prompting you to select a hearing date. Select a date that is at least two weeks away to give time to notify the parties on Exhibit A and Respondent.
- b. **If you already have a hearing date – click “DO NOT SCHEDULE”**

### **PART E: File Notice of Motion for Any Applicable *Exhibit A* Parties**

If there are any parties listed on *Exhibit A*, you will need to file a *Notice of Motion* certifying that you mailed said *Notice* to each party entitled to notice. After receiving confirmation of your requested hearing date, add this date and the case number to the *Notice*.

When you are ready to file the *Notice*, go to the Odyssey E-Filing website and log in. After logging in, click on “Start Filing” and then “File into Existing Case.” Find your case by entering the location and case number. Type the full year and six-digit case number without any spaces (ex: 2020P00XXXX).

Once you have found your case, click the icon that looks like a file folder “File Into.” Then, follow these steps:

### 1. Case Cross Reference Number

- a. Add your attorney code and click “Parties ☐” (see Part B, Step 2)

### 2. Party Information

- a. Leave section as is
- b. Click “Filings →”

### 3. Filings

- a. Filing Type: Change to “EFile Only”
- b. Filing Code: Notice of Motion
- c. Filing Description, Client Reference Number, Comments to Court, and Courtesy Copies: all optional fields that can be left blank
- d. Lead Document: Upload a PDF version of the *Notice of Motion*
- e. Security: Select “Non-Confidential”
- f. Click “+ Add Filing”
- g. Repeat for any other *Notices*
- h. Click “Skip to Fees → →”

### 4. Fees

- a. Payment Account: Select your “Waiver Account” (see Part A for how to create the Waiver Account)
- b. Party Responsible for Fees: Select the Respondent’s name
- c. Filing Attorney: Select your name
- d. Click “Review and Submit →”

### 5. Submission

- a. Check the box for notices and requirements regarding redaction and discovery responsibilities
- b. Review all the information and make sure you have uploaded the correct documents.
- c. Click “Submit” to submit your filings

## **PART F: Send Courtesy Copies to Court 2-5 Business Days in Advance of Court Date**

Two to five business days in advance of your court date, email courtesy copies of the following applicable documents to the Judge assigned to your case (see Probate Reference Guide for email address of your judge):

1. *Petition for Appointment of Guardian of Person with a Disability* (filed version with cover sheet and Exhibit A)
2. *CCP-211*
  - a. **(this form is not e-filed but original must be delivered to judge after court)**
3. Filed *Notice of Motion(s)*

4. Affidavit of Personal Service of Petition on Respondent
5. *Oath and Bond of Representative – No Surety*
  - a. **(this form is not e-filed but original must be delivered to judge after court)**
6. *Proposed Order Appointing Plenary Guardian of a Person with a Disability*
7. *Statement of Rights*

As the subject line of the email, follow this format: HEARING DATE, ESTATE OF [INSERT PARTY],  
CASE NUMBER