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**LexisNexis**<sup>TM</sup>  
*File & Serve*

## **File & Serve**

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### **QUICK GUIDE: MULTI-CASE FILING**

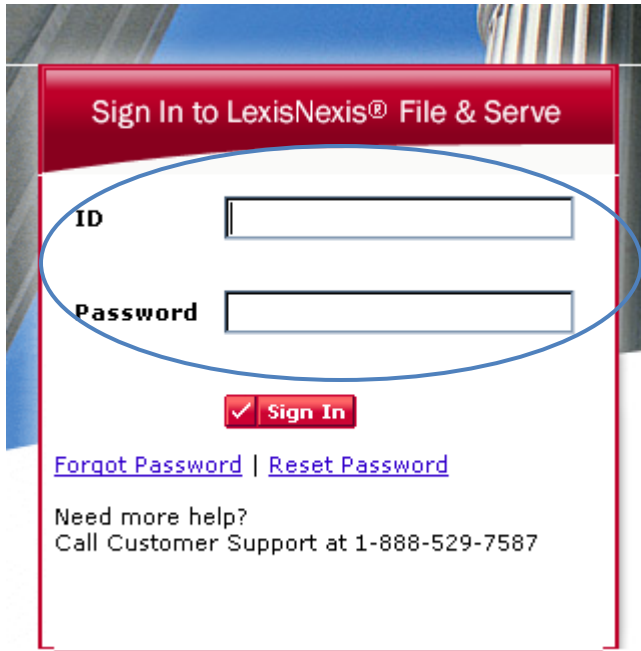
The Multi-Case Filing Quick Guide provides a convenient source of information to help you efficiently file and serve your documents into more than one case.

## Quick Tips Before You Begin

1. *Refer to the appropriate court rules on electronic filing prior to using File & Serve to ensure you are in compliance with local requirements. Copies of the rules can be found on the Resource Center once logged into the service. Not all courts allow documents to be filed into multiple cases.*
  2. *Check our minimum system requirements to be sure your computer is correctly configured for using File & Serve.*
  3. *All tables are sortable. Any time a grid or table appears, click the column headings to sort by that information.*
  4. *Hyperlinks take you to additional information – don't forget to use them!*
  5. *When running searches, less is more. Only enter partial information to get the most results.*
  6. *The fastest way to access a Transaction is with a Transaction ID.*
  7. *When using File & Serve for the first time, or if you need assistance, call our Customer Support team at 1-888-529-7587.*
-

## How to Sign On to File & Serve

1. Before using File & Serve, you must have an ID and password. If you do not have these, contact Customer Service.
2. Using Microsoft® Internet Explorer or Netscape® Navigator®, open your browser and go to [www.lexisnexis.com/fileandserve](http://www.lexisnexis.com/fileandserve).
3. Click the link on the left-hand side that says “Sign on to LexisNexis File & Serve.”
4. Enter your assigned ID and password and click **Sign in**.



Sign In to LexisNexis® File & Serve

ID

Password

[Forgot Password](#) | [Reset Password](#)

Need more help?  
Call Customer Support at 1-888-529-7587

## File & Serve: Start Filing

This Quick Guide details how to submit documents using File & Serve.

1. **Start a Transaction** - Allows you to select a case or cases in which to submit transactions.
2. **Cases** – Lets you look at the list of cases you have selected to submit documents into.
3. **Documents** - Lets you select the type of document you are sending and attach your documents.
4. **Filing Parties** - Allows you to select the client on whose behalf you are submitting the transaction.
5. **Service/Notice** - Allows you to select the recipients of the document you are filing.
6. **Additional Recipients** - Lets you send the transaction to recipients not on the service list (i.e. your client or co-counsel)
7. **Review & Submit** - This is where you review your work and submit the transaction to the court and/or other parties.

### FILING ELECTRONICALLY INTO A GROUP OF EXISTING CASES

1. To begin the filing process, click the **Filing & Service** tab.
2. Click the **File and/or Serve in Multiple Cases** radio button.
3. From the drop down menu, select court in which you want to file.
4. Type in identifying information about the case/cases you are looking for (i.e. partial case name or number).
5. To select cases, click the box to the left of the desired case number.
6. Repeat this process until all necessary cases are selected. Note: your cases will remain selected even when conducting subsequent searches for case names/numbers. To view previously selected cases within this same transaction, click on the **View Selected** tab.
7. Click **Begin Transaction**, located at the top of the list of cases.

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Search for and select the cases in which you will file your documents from the list of cases provided.

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LexisNexis Services: [Lexis.com®](#)

Home | **Early Case Assessment** | **Draft, File & Serve** | **Discovery** | **Research** | **Gather Intelligence** | **Trial Prep** | **Alerts & Tracks** | **Litigation Tools**

LexisNexis File & Serve | [Resource Center](#) | [File & Serve Preferences](#) | [System Options](#)

Home | **Filing & Service** | Alerts | Search | Service of Process

Start A Transaction | Saved Transactions | Scheduled Transactions

1/14/08 2:02 PM MST

To narrow the list below, select a court and/or enter the county and click **Find**.

Court: Colorado Mock Supreme Court Case Class: Civil-Appeal

Case Name: Case Number:

Find View Case Groups Advanced Search ?

Select cases and click **Begin Transaction**.

Case List [Begin Transaction](#) [View Selected](#) [Create Case Group](#)

If you can not find your case, please select Case Activation 1 through 3 of 3 Show 50 results per page

<input type="checkbox"/>	Case Number	Case Name	Case Type	Case Class	State	Court	County
<input checked="" type="checkbox"/>	2006SA67	Hamilton v. State of Colorado	SA: Supreme Court Appeals	Civil-Appeal	CO	Colorado Mock Supreme Court	
<input checked="" type="checkbox"/>	2006SC100	Cert Petition	SC: Cert Petitions	Civil-Appeal	CO	Colorado Mock Supreme Court	
<input checked="" type="checkbox"/>	2007SC300	Appellant vs. Appellee	SC: Cert Petitions	Civil-Appeal	CO	Colorado Mock Supreme Court	

1 through 3 of 3

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## CREATING CASE GROUPS

You can save your group selection as a Case Group for future transactions. After selecting your cases, type the name of your group in the space provided at the top of the list and click **Create Case Group**.

The screenshot shows the Total Litigator interface. At the top, there are navigation tabs: Home, Early Case Assessment, Draft, File & Serve, Discovery, Research, Gather Intelligence, Trial Prep, Alerts & Tracks, and Litigation Tools. Below these are sub-tabs for Home, Filing & Service, Alerts, Search, and Service of Process. A red bar contains buttons for Start A Transaction, Saved Transactions, and Scheduled Transactions. The main area shows a search filter for 'Colorado Mock Supreme Court' and a 'Case Class' dropdown set to 'Civil-Appeal'. Below the search filters, there are buttons for 'Find', 'View Case Groups', and 'Advanced Search'. A table of cases is displayed with columns for Case Number, Case Name, Case Type, Case Class, State, Court, and County. The 'Create Case Group' button is circled in red, and the text 'Hamilton Group' is entered in the adjacent input field.

Case Number	Case Name	Case Type	Case Class	State	Court	County
<input checked="" type="checkbox"/> 2006SA67	Hamilton v. State of Colorado	SA: Supreme Court Appeals	Civil-Appeal	CO	Colorado Mock Supreme Court	
<input checked="" type="checkbox"/> 2006SC100	Cert Petition	SC: Cert Petitions	Civil-Appeal	CO	Colorado Mock Supreme Court	
<input type="checkbox"/> 2007SC300	Appellant vs. Appellee	SC: Cert Petitions	Civil-Appeal	CO	Colorado Mock Supreme Court	

## USING CASE GROUPS

To Select a Case Group click **View Case Groups**. A list of your firms Case Groups will appear. To select a Case Group for Filing click the arrow button beside the group name. Once a case group has been created it can be used by all users at the firm.

The screenshot shows the Total Litigator interface. At the top, there are navigation tabs: Home, Early Case Assessment, Draft, File & Serve, Discovery, Research, Gather Intelligence, Trial Prep, Alerts & Tracks, and Litigation Tools. Below these are sub-tabs for Home, Filing & Service, Alerts, Search, and Service of Process. A red bar contains buttons for Start A Transaction, Saved Transactions, and Scheduled Transactions. The main area shows a search filter for 'Colorado Mock Supreme Court' and a 'Case Class' dropdown set to 'Civil-Appeal'. Below the search filters, there are buttons for 'Find', 'View Case Groups', and 'Advanced Search'. The 'View Case Groups' button is circled in red.

# File & Serve: Documents

The screenshot shows the LexisNexis File & Serve interface. At the top, there are navigation tabs for 'Home', 'Early Case Assessment', 'Draft, File & Serve', 'Discovery', 'Research', 'Gather Intelligence', 'Trial Prep', 'Alerts & Tracks', and 'Litigation Tools'. Below these are more specific tabs for 'Home', 'Filing & Service', 'Alerts', 'Search', and 'Service of Process'. The main content area is titled 'Attach Documents' and includes a 'Transaction ID: 18029415' and buttons for 'Cancel' and 'Save & Close'. The form is for a 'Multi-Case Colorado Mock Supreme Court' and contains the following fields:

- Type:** Notice of Filing Cross Appeal (dropdown menu)
- File:** D:\Documents and Settings\carterk1\... (with a 'Browse...' button and a checkbox for 'Check here to fax your document')
- Access:** Public (dropdown menu) with a note: 'Public - These documents are electronically submitted and available for viewing by LexisNexis File & Serve customers.'
- Title:** Hamilton Notice of Filing Cross Appeal (text field)

The 'Attach Document' button is circled in red. Below the form is an 'Attached Documents List' which is currently empty. At the bottom, there is a LexisNexis logo and contact information.

## SELECTING DOCUMENTS

1. Select a Document Type for your document using the drop down menu entitled **Type**.
2. To attach your document, click the **Browse** button in the *File* section. A dialog box will open and from there you can locate the file you previously saved to your hard drive or network. You may also select the *Check here to fax your document* box.
3. Enter a title for your document in the *Title* field. The title should comply with local rules for electronic filing.
4. Select an access type for your filing – access is defined by each court but may include the following:

**Public:** The document is a publicly filed instrument.

**Filed Conventionally:** Some courts use this option to indicate that documents are in paper format at the courthouse for viewing and the e-file record uses this term to indicate a placeholder in the file jacket for those paper filed documents.

**In camera:** Documents designated as in camera are only viewable by the Judge on the case. Other court personnel, attorneys or firms on the case cannot access in camera documents.

**Sealed:** Sealed documents may be handled in one of two ways, depending on how the receiving court has opted to handle sealed instruments:

- i. The sealed document can be attached to the e-filed transaction and only available online to the court and served parties.
  - ii. The court may require that the documents be filed in hard copy with the court and that a placeholder be e-filed into the electronic docket.
5. Click **Attach Document**. The document will appear in the *Attached Documents* list.

6. To add more documents, repeat steps 1-5.
7. When filing supporting documents, use the *Main/Supporting* feature to reflect the association. In the column next to each supporting document, select the document ID for the main document to which it supports.

**Attach Documents** Transaction ID: 18029415 [Cancel](#) [Save & Close](#)

**Multi-Case Colorado Mock Supreme Court**  
 For each document, complete each field and click **Attach Document**.

Type:  Statutory Transaction Fee: None

File:  [Browse...](#) or  Check here to fax your document [?](#)

Access:  Public - These documents are electronically submitted and available for viewing by LexisNexis File & Serve customers.

Title:  [Attach Document](#) [?](#)  
 Maximum length of text is 510 characters

**Attached Documents List** [Click here to refresh document conversion status](#)

ID	Document Type	Access	Conversion Status	Main/Supporting	Linked To:	Modify	Remove
12959262	Notice of Filing Cross Appeal	Public	Converted	Main <input type="text"/>	None <a href="#">Edit Link</a>	<a href="#">Modify</a>	<a href="#">Remove</a>
<b>Document Title:</b> <a href="#">Hamilton Notice of Filing Cross Appeal</a>							
12959284	Letters	Public	Converted	<span style="border: 2px solid red; border-radius: 50%; padding: 2px;">12959262 <input type="text"/></span>	None <a href="#">Edit Link</a>	<a href="#">Modify</a>	<a href="#">Remove</a>
<b>Document Title:</b> <a href="#">Hamilton Letter</a>							

8. If you need to remove a document, click the *Remove* link next to the document you wish to delete from the Filing.
9. When all of the documents have been attached and associated, click the **Sending Parties** tab to continue.

# File & Serve: Sending Parties

Total Litigator [Switch Client](#) | [Preferences](#) | [History](#) | [Sign Off](#)  
LexisNexis Services: [Lexis.com](#)

Home **Early Case Assessment** Draft, File & Serve Discovery Research Gather Intelligence Trial Prep Alerts & Tracks **Litigation Tools**

LexisNexis File & Serve | [Resource Center](#) | [File & Serve Preference: System Option](#)

Home **Filing & Service** Alerts Search Service of Process

**Start A Transaction** | Saved Transactions | Scheduled Transactions

1/14/08 3:38 PM MST **Case** Documents **Sending Parties** Service Add'l Recipients Review & Submit

**Select Sending Parties** Transaction ID: 18029415 [Cancel](#) [Save & Close](#)

Multi-Case Colorado Mock Supreme Court

Search Custom Groups ?

Create Custom Group  Show 50 results per page

**Court Participants Available for Selection** 1 through 1 of 1

<input type="checkbox"/> Party	Party Type	Party Status	Attorney	Firm
<input type="checkbox"/> N/A	N/A	Active	Williams, Judge	Colorado Mock Supreme Court

**Parties with Representation Available for Selection** 1 through 3 of 3

<input type="checkbox"/> Party	Party Type	Party Status	Attorney	Firm
<input checked="" type="checkbox"/> Hamilton, Sandra	Appellant	Active	Attorney, Adam	Mock Firm A-Bellevue
<input type="checkbox"/> Johnson, Sandy	Petitioner	Active	Attorney, Adam	Mock Firm A-Bellevue
<input type="checkbox"/> State of Colorado	Respondent	Active	Lawyer, Lucy	Mock Firm B

**Parties without Representation Available for Selection** 1 through 1 of 1

<input type="checkbox"/> Party	Party Type	Party Status	Attorney	Firm
<input checked="" type="checkbox"/> State of Colorado	Appellee	Active	Pro Se	Pro Se-

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## SELECTING SENDING PARTIES:

1. To select the party or parties you represent in this case place a check in the box next to the party name in the *Parties Available for Selection* list.
2. Click the **Service** tab to continue.

## SELECTING PARTIES TO SERVE:

1. To select the parties that you would like to serve, place a check in the box next to the party name in the *Party* column.
2. Pay special attention to the *Method* column located to the far right of your screen. The *Method* column indicates the method of service in which the recipient(s) will be served.
3. Click the **Additional Recipients** tab to continue.



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Home | **Filing & Service** | Alerts | Search | Service of Process

**Start A Transaction** | **Saved Transactions** | **Scheduled Transactions**

1/14/08 3:06 PM MST | Case | Documents | Sending Parties | **Service** | Add'l Recipients | Review & Submit

**Select Recipients** Transaction ID: 18029415 [Cancel](#) [Save & Close](#)

Multi-Case Colorado Mock Supreme Court

?

Select a delivery option for each party you want to add. "Service" is official legal service of the document upon the selected party. To remove a selected party, deselect service.

**Parties Available for Selection** 1 through 4 of 4 Show  results per page

Service	Party	Party Type	Party Status	Attorney	Firm	Method
<input checked="" type="checkbox"/>	Hamilton, Sandra	Appellant	Active	Attorney, Adam	Mock Firm A-Bellevue	E-Service
<input checked="" type="checkbox"/>	Johnson, Sandy	Petitioner	Active	Attorney, Adam	Mock Firm A-Bellevue	E-Service
<input checked="" type="checkbox"/>	State of Colorado	Appellee	Active	Pro Se	Pro Se-	U.S. Mail
<input checked="" type="checkbox"/>	State of Colorado	Respondent	Active	Lawyer, Lucy	Mock Firm B	E-Service

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**Note:** If the court you are filing into does not approve service via File & Serve to a Pro Se or Pro Per party, then you will not be able to select the party and must serve the party traditionally. Service to a Pro Se/Pro Per party via File & Serve will be completed via regular U.S. Mail and is not guaranteed if the information you provide is not accurate. If this does not meet your needs, then please serve the party traditionally.

## File & Serve: Additional Recipients

### SELECTING ADDITIONAL RECIPIENTS

You may choose to add additional recipients to your transaction.

- The system will require a user to “search” first for an additional recipient before having the ability to create a new additional recipient.
- Search results will display File & Serve subscribers that match the search results as well as any non-member users.
- If no results appear for the search, or the results that appear are not the ones the user wanted, then the user will see a button to “Create Additional Recipient”.
- When creating a new Additional Recipient, the user will now enter both a First and Last Name and will then select whether they want to do “Online” or “Fax” as the delivery method.
- After entering a new Additional Recipient, the system will then create a non-member “account” for the additional recipient. (Additional Recipients will receive emails with instructions as to how to retrieve the documents. They will be provided with a login/password for the sole purpose of retrieving those documents.)
- That non-member account will now appear in the search results when filers search the name and will display the notification method previously entered for the additional recipient non-member.

LexisNexis® File & Serve Greenberg & Sada PC | [Resource Center](#) | [File & Serve Preferences](#)

Home **Filing & Service** Alerts Search

Start A Transaction | Saved Transactions | Scheduled Transactions

7/29/11 3:26 PM MDT Documents Sending Parties Service **Add'l Recipients** Review & Submit

**Select Additional Recipients** Transaction ID: 29328713 Cancel Save & Close

2011CS611 Alpine Credit vs Susan Blake CO Broomfield County-County Court 17th JD

Enter a few characters in Last Name, Email, or Organization, and click **Find** to search for available recipients. If your search is unsuccessful, you may change your criteria and try again, or choose to **Create Additional Recipient**

Additional Recipient

First Name	<input type="text" value="Joanna"/>	Last Name	<input type="text" value="Gordon"/>
Email	<input type="text"/>	Organization	<input type="text"/>

Find Clear ?

To remove a recipient, select the check box for the recipient and click the **Remove** link. To add more recipients, click the **Create Additional Recipient** button below or enter new search criteria above and click **Find**.

No available selections

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Home **Filing & Service** Alerts Search

Start A Transaction | Saved Transactions | Scheduled Transactions

7/29/11 3:27 PM MDT Documents Sending Parties Service **Add'l Recipients** Review & Submit

**Select Additional Recipients** Transaction ID: 29328713 Cancel Save & Close

2011CS611 Alpine Credit vs Susan Blake CO Broomfield County-County Court 17th JD

Enter a few characters in Last Name, Email, or Organization, and click **Find** to search for available recipients. If your search is unsuccessful, you may change your criteria and try again, or choose to **Create Additional Recipient**

Additional Recipient

First Name	<input type="text" value="Joanna"/>	Last Name	<input type="text" value="Gordon"/>
Email	<input type="text"/>	Organization	<input type="text"/>

Find Clear ?

**Create Additional Recipient**

Enter the information for the person you wish to add to the Additional Recipient List. When you finish, click **Add to Recipient List**.

First Name:  Last Name:

Online \*Email address:

Fax

Add to Recipient List Cancel

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**NOTE:** LexisNexis™ cannot guarantee delivery if the information you provide is incomplete or incorrect.

# File & Serve: Review and Submit

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Service of Process

Start A Transaction
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Scheduled Transactions

1/14/08 3:42 PM MST
Case
Documents
Sending Parties
Service
Add'l Recipients
Review & Submit

Authorize Transaction
Transaction ID: 18029415
Cancel
Save & Close

Multi-Case
Colorado Mock Supreme Court

**Select an individual to authorize this transaction.**

Court Authorizer [Find](#) Williams, Judge ▼ or Other Authorizer [Find](#)

---

**Delivery Options: What do you want to do with this transaction? (pick one)**

File with the court and Serve selected parties  
 I am sending these documents as "Court-Appointed Counsel/ADR".  
 Serve Only - Private (available only to sending firm and served firms)  
 Serve Only - Public (available to anyone to purchase from LexisNexis(tm) File & Serve, except in e-service only jurisdictions and subject to case security policies).

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**Charge fax transaction on behalf of fee?**

Yes  No

---

**Add billing reference. This reference will appear on your invoice.**

---

**Note to Clerk (optional):**

If you wish to send a note to the court along with your transaction, please enter it in the space provided. This will only be viewable by the court users and you or your organization.

Maximum length of text is 500 characters

---

**Choose to submit transaction now, or schedule the transaction for later release.**

Authorize and file now  
 Authorize and file on  
 /  /  at :  AM  (mm/dd/yyyy) at (hh:mm) MT

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**IMPORTANT:** Your transaction has not yet been submitted. You will next be asked to review and submit your transaction.

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## AUTHORIZING AND SUBMITTING THE TRANSACTION

1. Check all information on the transaction summary.
2. Make any changes to the filing on the appropriate tab; then return to the *Review and Submit* page.
3. From the drop down menu select the name of the individual authorizing the filing.

4. If you want to serve or deliver documents only, without filing a copy with the court, select Serve Only – Public or Serve Only - Private.
5. Next, enter any billing information you wish to appear on your invoice.
6. You can choose to authorize and file your documents now, or you may choose to enter a future date and time for the document to be automatically sent.
7. Click **Submit**. To submit your Transaction to the court and serve your chosen parties.
8. A Transaction Receipt appears containing your date and time of filing “stamp”, print a copy for your records.

When submitting into multiple cases you have the option to expand the case name and number to view the original case name and numbers into which you are submitting the transaction. You may do this by clicking the arrow in **Case Name** or **Case Number** field.

# File & Serve: Transaction Receipt

A File & Serve Transaction Receipt appears containing your date and time of filing “stamp”, print a copy for your records.

**Total Litigator**

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1/14/08 3:47 PM MST  
 Your transaction has been successfully submitted to LexisNexis File & Serve. Your transaction information appears below. To print this information for your records, click anywhere on the transaction information, then click the browser Print button.  
 To perform another transaction, click **Begin a New Transaction**.  
 To exit File & Serve, click **Return to My File & Serve**.

**TIP:** Receive notifications of new Filing & Service activity that match your search criteria. Click on the Alerts tab.

### LexisNexis File & Serve Transaction Receipt

<b>Transaction ID:</b>	18029415
<b>Submitted by:</b>	
<b>Authorized by:</b>	Judge Williams, Colorado Mock Supreme Court
<b>Authorize and file on:</b>	Jan 14 2008 2:42PM MST

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<b>Court:</b>	Colorado Mock Supreme Court
<b>Division/Courtroom:</b>	N/A
<b>Case Class:</b>	Civil-Appeal
<b>Case Type:</b>	SA: Supreme Court Appeals
<b>Case Number:</b>	<input type="checkbox"/> Multi-Case 2006SC100 2006SA67
<b>Case Name:</b>	<input type="checkbox"/> Multi-Case Cert Petition Hamilton v. State of Colorado

---

<b>Transaction Option:</b>	File and Serve
<b>Billing Reference:</b>	

---

**Documents List**  
 2 Document(s)

Attached Document, 1 Pages Document ID: 12959262	<a href="#">PDF Format</a>	<a href="#">Original Format</a>												
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%;"><b>Document Type:</b> Notice of Filing Cross Appeal</td> <td style="width: 15%;"><b>Access:</b> Public</td> <td style="width: 20%;"><b>Statutory Fee:</b> \$0.00</td> <td style="width: 25%;"><b>Linked:</b></td> </tr> <tr> <td colspan="4"><b>Document title:</b> Hamilton Notice of Filing Cross Appeal</td> </tr> </table>	<b>Document Type:</b> Notice of Filing Cross Appeal	<b>Access:</b> Public	<b>Statutory Fee:</b> \$0.00	<b>Linked:</b>	<b>Document title:</b> Hamilton Notice of Filing Cross Appeal									
<b>Document Type:</b> Notice of Filing Cross Appeal	<b>Access:</b> Public	<b>Statutory Fee:</b> \$0.00	<b>Linked:</b>											
<b>Document title:</b> Hamilton Notice of Filing Cross Appeal														
Attached Document, 1 Pages Document ID: 12959284	<a href="#">PDF Format</a>	<a href="#">Original Format</a>												
<table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4"><small>Related Document ID: 12959262</small></td> </tr> <tr> <td style="width: 40%;"><b>Document Type:</b> Letters</td> <td style="width: 15%;"><b>Access:</b> Public</td> <td style="width: 20%;"><b>Statutory Fee:</b> \$0.00</td> <td style="width: 25%;"><b>Linked:</b></td> </tr> <tr> <td colspan="4"><b>Document title:</b> Hamilton Letter</td> </tr> </table>	<small>Related Document ID: 12959262</small>				<b>Document Type:</b> Letters	<b>Access:</b> Public	<b>Statutory Fee:</b> \$0.00	<b>Linked:</b>	<b>Document title:</b> Hamilton Letter					
<small>Related Document ID: 12959262</small>														
<b>Document Type:</b> Letters	<b>Access:</b> Public	<b>Statutory Fee:</b> \$0.00	<b>Linked:</b>											
<b>Document title:</b> Hamilton Letter														

[Expand All](#)

**Sending Parties (2)**

Party	Attorney	Firm
Hamilton, Sandra	Attorney, Adam	Mock Firm A-Bellevue
State of Colorado	Pro Se	Pro Se-

**Recipients (1)**

**Service List (1)**

Delivery Option	Party	Attorney	Firm	Method
Service	Johnson, Sandy	Attorney, Adam	Mock Firm A-Bellevue	E-Service

**Additional Recipients (0)**

**Case Parties**

Begin a New Transaction
Return to My File & Serve
Print

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