



File & ServeXpress

Filing and Serving Documents
User Guide

File & ServeXpress[™]

File & Serve*Xpress*

Filing and Serving Documents

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File & Serve Resources

File & ServeXpress has many resources available to you in order to address your questions and concerns.

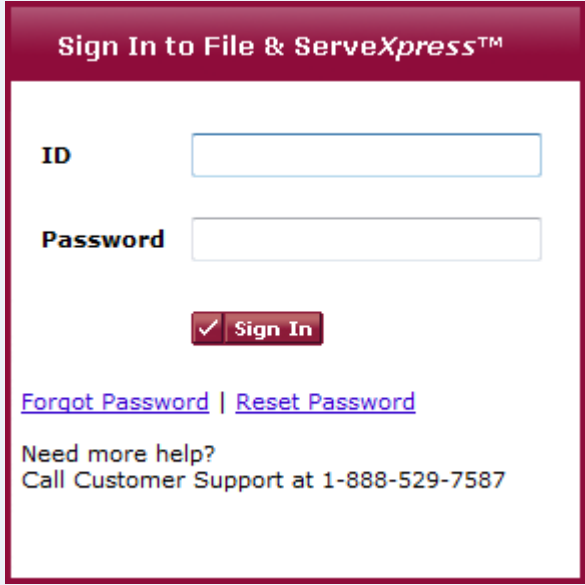
- **File & ServeXpress 24/7 Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 1-888-529-7587.
- **File & ServeXpress Resource Center** is available within File & Serve by clicking on the Resource Center link at the top, right hand side of your screen. The Resource Center contains our training registration information, jurisdiction specific rule & procedures, user guides, best practices, pricing and much more!
- **File & ServeXpress Login Page** www.fileandservexpress.com is where you can find password help, what's new and any important information like scheduled maintenance or system changes.
- **File & ServeXpress Notices** is an information page that is available on the bottom, left-hand side of the File & Serve Home tab, once you sign into File & Serve. This page will provide you with any critical information, such as system maintenance or downtime, changes in fees, legal notices, litigation launches and much more.

Filing and Serving Documents Overview

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

Before You Begin

Signing on to File & ServeXpress:



Sign In to File & ServeXpress™

ID

Password

Sign In

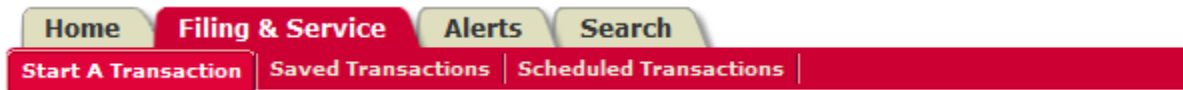
[Forgot Password](#) | [Reset Password](#)

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

1. Before using File & ServeXpress, you must have an ID and password. If you do not have these, contact Client Service.
2. Using Microsoft® Internet Explorer or Netscape® Navigator®, open your browser and go to www.fileandservexpress.com
3. Enter your assigned ID and password and click **Sign in**.

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 application.
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. Enter only 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 24/7 Client support line at 1-888-529-7587.

Filing & Service Tab



There are 6 easy steps to submitting documents using the File & Serve “Filing & Service” tab. Each of these steps is detailed in this guide:

1. **Start A Transaction Queue**- Allows you to select a case to E-file and/or E-serve into.
2. **Documents Tab**- Lets you select the type of document you are submitting and attach your documents.
3. **Sending Parties Tab**- Allows you to select the client for which you are submitting the transaction.
4. **Service Tab**- Allows you to select the recipients of the transaction you are submitting.
5. **Additional Recipients Tab**- Lets you send the transaction to recipients not on the service list (i.e. your client or co-counsel).
6. **Review & Submit Tab** - Allows you to review your work and submit the transaction to the court and other parties.

Filing & Service Tab Tips:

- ✓ **Saved Transactions Queue:**
Saved Transactions The *File & Serve* system is designed to save your work as you go. If you lose connectivity or power for any reason, check your Saved Transactions to resume work on an unfinished transaction.
- ✓ **Scheduled Transactions Queue:**
Scheduled Transactions *File & Serve* allows users to schedule submittals of transactions for future dates and times. Users can update/delete these transactions in the Scheduled Transactions queue up to the date and time they are scheduled to be submitted.

Start A Transaction Queue

Home Filing & Service Alerts Search

Start A Transaction Saved Transactions Scheduled Transactions

Select Court and/or Case for Filing

File and/or Serve in an Existing Case File a New Case File and/or Serve in Multiple Cases

Enter information in one or more boxes and click Find. Selection of a Court is required

State:

Court:

Case Name:

Case Number:

Find Advanced Search ?

To E-file and/or E-serve into an Existing Case, follow these steps:

1. To begin the filing/serving process, click the **Filing & Service** tab. The *Start A Transaction* queue appears.
2. *File and/or Serve in an existing case* is already selected. An existing case is one that is already online with File & Serve.
3. From the drop down menu, select the state and court in which you choose to file.
4. Enter the case number or case name in the fields available and click **Find**. (you may use partial names or numbers to search on as well).

Start A Transaction Queue continued on next page...

Home **Filing & Service** Alerts Search

Start A Transaction Saved Transactions Scheduled Transactions

3/15/12 10:36 AM CDT


Select Court and/or Case for Filing

File and/or Serve in an Existing Case
 File a New Case
 File and/or Serve in Multiple Cases








Enter information in one or more boxes and click **Find**. Selection of a Court is required

State:
 Case Name:

Court:
 Case Number:

To select a case for filing, click  beside the case.

Case List 1 through 7 of 7 Show results per page

Case Number	Case Name	Case Type	Case Class	State	Court	County
 03456-A	Alice in Wonderland Inc vs Composition Co	Personal Injury	Civil	WA	Mock Court-Filing & Serving	
 08C900017	Wonderland, Alice vs Queen Hearts	Personal Injury	Civil	WA	Mock Court-Filing & Serving	
 08C900028	Wonder, Alice vs Heart Corp	Personal Injury	Civil	WA	Mock Court-Filing & Serving	
 1234-2009	Wonderland, Alice v. Heart Corporation	Personal Injury	Civil	WA	Mock Court-Filing & Serving	
 132232342	Wonderland, Alice vs Joker International	Non-Arbitration	Civil	WA	Mock Court-Filing & Serving	
 321456	Smith, Alice vs Wonderland Corp	Personal Injury	Civil	WA	Mock Court-Filing & Serving	
 95863214	Smith, Alice vs Jane Doe	Personal Injury	Civil	WA	Mock Court-Filing & Serving	

1 through 7 of 7

Can't find the case you are looking for?
Click on the **Add Case** button to enter your case information.

Start A Transaction Queue Tips:

- ✓ **Adding a Case:** If the case you are trying to file in is not available but is currently a pending case in your court you may be able to submit an Add Case request. If the court you are filing with allows this type of request, click the **Add Case** button. Detailed instructions on adding a new case are included on page 18 of this guide.

5. Cases matching your criteria will appear in the list below the "Find" button.
6. To select the case, click the arrow icon to the left of the desired case number.

Documents Tab

Home Filing & Service Alerts Search

Start A Transaction Saved Transactions Scheduled Transactions

3/15/12 2:35 PM CDT Documents Sending Parties Service Add'l Recipients Review & Submit

Attach Documents Transaction ID: 43102276 Cancel Save & Close

03456-A Alice in Wonderland Inc vs Composition Co Mock Court-Filing & Serving

For each document, complete each field and click **Attach Document**.

Type: Statutory Transaction Fee: None

File: or Check here to fax your document ?

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

Title: ?

Maximum length of text is 510 characters

Attached Documents List:

No Documents have been attached to this transaction.

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.

Documents Tab Tips:

- ✓ **Transaction ID:** This number is the tracking number for this transaction and can be used to view the details of the transaction within the File & Serve system.
- ✓ **Cancel Link:** This function will purge the entire transaction from the system.
- ✓ **Save & Close Link:** This function will save all information for this transaction in the Saved Transactions queue until the transaction is resumed.

- **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:
 - a. The sealed document can be attached to the e-filed transaction and only available online to the court and served parties.
 - b. 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:

Attached Documents List

[Click here to refresh document conversion status](#)

ID	Document Type	Access	Conversion Status	Main/Supporting	Linked To:	Modify	Remove
46940104	Motion for Summary Judgment	Public	Converted	Main	None Edit Link	Modify	Remove
Document Title: Plaintiff Alice in Wonderland Inc's Motion for Summary Judgment Against Compostion Co							
46940120	Exhibits	Public	Converting	Main Main 46940104	None Edit Link	Modify	Remove
Document Title: Exhibit A							

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.
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.

Sending Parties Tab

3/15/12 3:47 PM CDT Documents **Sending Parties** Service Add'l Recipients Review & Submit

Select Sending Parties Transaction ID: 43102276 Cancel Save & Close

03456-A Alice in Wonderland Inc vs Composition Co Mock Court-Filing & Serving

Search Custom Groups Add Party/Attorney ?

Create Custom Group Show 50 results per page

Parties without Representation Available for Selection 1 through 1 of 1					
<input type="checkbox"/>	Party	Party Type	Party Status	Attorney	Firm
<input type="checkbox"/>	Catt, Cheshire	Plaintiff	Active	No Answer on File	Firm TBD

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.
- Or-
2. You may search for a specific party by searching the available parties.
3. To search the available parties, click **Search**.
4. A series of search fields is available to help you find the party you are looking for.
5. You must place a check in the box by the party name to select that party.
6. Close the search fields by clicking **Close Search**.
7. Continue with this process until you have completed the sending parties list.
8. You may edit your selections by selecting or deselecting the parties.
9. Click the **Service/Notice** tab to continue.

Sending Parties Tab Tips:

- ✓ **Adding a Party to a Case:** If the party you are trying to file for is not available in either the represented or unrepresented parties' lists, you may be able to submit an Add Party request with your transaction. If the court you are filing with allows this type of request with your transaction, click the **Add Party** button. Details for adding a party while filing are included on page 23 of this guide.

- ✓ **Create Custom Group**
You can save your selection as a **Custom Group** for future transactions. After selecting your parties, type the name of your group in the space provided, then click **Create Custom Group**.

- ✓ **Custom Groups**
To use a custom group click **Custom Groups**. A list of your custom groups will appear. Select the custom group you wish to use for Sending by clicking the check mark box beside the name.

Service Tab



1. To select a party/parties to receive **Service** (a copy of the document(s) you are transmitting), place a check in the corresponding box in the Service column next to the party names.
2. To select all parties, click the box below service on the gray header bar. This will automatically select all parties on the service list.
3. The method of delivery File & Serve will use to deliver your documents is listed under the Method column.
 - If the designated recipient is a registered user of File & Serve, then the documents or notice will be delivered to their **online** account.

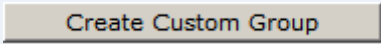
Service Tab Tips:

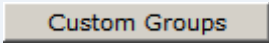
- ✓ **Serving Pro Se Parties:** If available in the court you are filing in, you may be able to serve a Pro Se or Pro Per party by typing in a U.S. Mail delivery address. You will be prompted to enter an address for each Pro Se or Pro Per party you select to serve via regular U.S. Mail.
 - The most recently used addresses will display for each party you have selected to serve. You can use the address provided or enter your own address. The source of the information will appear in the *Entered By* field.
 - You can opt to share this address with other E-filers, or you can mark it as “private” so that it will be available only to your firm.
 - If you do not want to serve the Pro Se party, click the **Do Not Serve This Party** radio button.

- If the designated recipient is not a registered user, then the documents will be delivered via traditional methods (**US Mail** or **facsimile**, depending on the rules for service for that court)
4. If a checkbox does not appear for you to select, then you cannot use File & Serve as a delivery method to send documents to that party and will have to send service to that party via traditional means.
 5. You may search for a specific party by searching the available parties, attorneys or firms.
 6. To search the available parties, click **Search**. A series of search fields is available to help find the party you are looking for.
 7. You must place a check in the box next to the party name to select that party.
 8. Close the search fields by clicking **Close Search**.
 9. Continue with this process until you have completed adding parties to the service list.
 10. You may edit your selections by selecting or deselecting the parties.

Service Tab Tips:

- ✓ **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 using traditional methods.

- ✓  You can save your selection as a **Custom Group** for future transactions. After selecting your parties, type the name of your group in the space provided, then click **Create Custom Group**.

- ✓  To use a custom group click **Custom Groups**. A list of your custom groups will appear. Select the custom group you wish to use for Sending by clicking the check mark box beside the name.

Additional Recipients Tab

Home Filing & Service Alerts Search

Start A Transaction Saved Transactions Scheduled Transactions

3/15/12 2:32 PM CDT Documents Sending Parties Service Add'l Recipients Review & Submit

Select Additional Recipients Transaction ID: 43102276 Cancel Save & Close

03456-A Alice in Wonderland Inc vs Composition Co Mock Court-Filing & Serving

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

First Name Last Name

Email Organization

Find Clear ?

To add recipients, enter search criteria above and click Find.

No available selections

1. The system requires a user to initially “search” for an additional recipient before being given the option to create a new additional recipient.
2. Search results will display both File & Serve subscribers and non-member users.
3. **Create Additional Recipient** If no results or inaccurate results appear for the search, then the user will see a button to “Create Additional Recipient”.
4. When creating a new Additional Recipient, the user will now enter both a First and Last Name and will then select either “Online” or “Fax” as the delivery method.
5. After entering a new Additional Recipient, the system will then create a non-member “account” for the additional recipient.
6. 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.

Additional Recipients Tab Tips:

- ✓ **New Additional Recipients:** Newly added 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.

Review & Submit Tab

Home Filing & Service Alerts Search

Start A Transaction Saved Transactions Scheduled Transactions

3/15/12 2:49 PM CDT Documents Sending Parties Service Add'l Recipients Review & Submit

Authorize Transaction Transaction ID: 43102276 Cancel Save & Close

03456-A Alice in Wonderland Inc vs Composition Co Mock Court-Filing & Serving

Select an attorney to authorize this transaction.

Authorizing Attorney: Select an authorizing attorney

1. Select an authorizing attorney from your office in the dropdown list.

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).

2. Select a delivery option from the following options:
 - **File and Serve:** The transaction will be filed with the court and served to all designated recipients. It will be available to be viewed and purchased by registered File & Serve users as a publicly-filed instrument.
 - **Serve Only – Private:** Sends the transaction ONLY to your selected service recipients. The document IS NOT filed with a court. It is not available to any registered File & Serve users that you did not select for service, and may not be viewed or purchased as a publicly filed document.
 - **Serve Only – Public:** Sends the transactions ONLY to your selected service recipients. The document IS NOT filed with a court. The document is available to

be searched, viewed, printed and purchased by any registered File & Serve users as a publicly available document unless the transaction is submitted in a Service Only jurisdiction. If the document is served in a Service only jurisdiction, the document is only viewable by other users within the same litigation.

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

3. Enter any billing information you want included on your invoice.

Purchase read status for e-service documents (optional) \$

Track when the e-served recipients open this transaction. This feature is not available for tracking any US Mail or fax recipients, any courtesy email notifications, nor the Read Status of court personnel. Additional charges apply.

4. If you would like to pre-order a “Read Status” report that shows when an e-served recipient opened the transaction, click the box as shown. (A one-time fee applies – anyone in firm can access thereafter as often as they want). 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.

5.  Click **Next** to proceed with Filing.

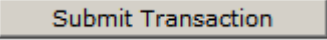
Review & Submit Tab continued on next page...

Review & Submit Tab Tips:

- ✓ **Read Status:** To access this report after the transaction is completed, go the Transaction Details from anywhere in the application, scroll down to the “Read Status” link, click the link and you will see the report – which is printable. If you did not pre-order the Read Status during the transaction process, you will be prompted with the fee after clicking the Transaction Details.

The screenshot shows a web interface for a legal filing system. At the top, there are navigation tabs: 'Home', 'Filing & Service', 'Alerts', and 'Search'. Below these are sub-tabs: 'Start A Transaction', 'Saved Transactions', and 'Scheduled Transactions'. A red bar indicates the current date and time: '3/15/12 2:58 PM CDT'. Further down, there are more sub-tabs: 'Documents', 'Sending Parties', 'Service', 'Add'l Recipients', and 'Review & Submit'. The main content area is titled 'Review and Submit' and includes the transaction ID '43102276'. It contains a warning message: 'IMPORTANT: Your transaction has not yet been submitted. When you have finished reviewing, select Submit Transaction below.' Below this, there is a table of transaction details:

Transaction ID:	43102276
Submitted by:	Justin Payne, Mock Appeals Firm A-Demo
Authorized by:	Justin Payne, Mock Appeals Firm A-Demo Edit

6. Review the summary information.
7. To make any changes to your information, click the edit link provided in that section or click the tab containing the information to be changed.
8.  When the information has been verified and you are ready to proceed, click **Submit Transaction**.

Transaction Receipt/Report

File & ServeXpress
Welcome: Attorney, Adam
Mock Firm A-Bellevue

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

Start A Transaction | Saved Transactions | Scheduled Transactions

12/18/12 5:01 PM CST
Your transaction has been successfully submitted to File & ServeXpress. Your transaction information appears below. To print this information for your records, click anywhere on the transaction information, then click the browser Print button.
For a formatted copy of this information, obtain a [transaction report](#).
To perform another transaction, click **Begin a New Transaction**.
To exit Filing & Service, click **Return to My File & ServeXpress**.

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

File & ServeXpress Transaction Receipt

Transaction ID:	47870376
Submitted by:	Adam Attorney, Mock Firm A-Bellevue
Authorized by:	Adam Attorney, Mock Firm A-Bellevue
Authorize and file on:	Dec 18 2012 5:02PM CST
Court:	Mock Court-Filing & Serving
Division/Courtroom:	1 - Division 1
Case Class:	Civil
Case Type:	Non-Arbitration

- Once you click the Submit tab, the page will refresh and you will see a Transaction Receipt. You may print this receipt off for your records or search for it on File & Serve by Transaction ID in the future.
- [transaction report](#). You may order a “Transaction Report” after the transaction is submitted. This report is a comprehensive, up to the date, document that will provide all of the transaction details, including Clerk & Judge review (if applicable) -- with the option of ordering the “read status” as well. Simply click the link on the top that says “transaction report”.

Transaction Receipt/Report Tips:

- ✓ Sample Transaction Report:

File & ServeXpress
December 18, 2012

Max Powers
Mock Appeals Firm B-Demo
13427 NE 16th St
Bellevue, CA 98005

RE: File & ServeXpress Transaction No. 42724428

Official Document
RPM 058191
December 18, 2012
10:02:34 AM MST
File & ServeXpress

Dear Customer:

The following information for File & ServeXpress Transaction 42724428 reflects the details of the transaction contained in the File & ServeXpress system as of December 18, 2012 10:02:34 AM MST.

Lisa Lawyer, authorized by Lisa Lawyer, submitted Transaction 42724428 on February 27, 2012 09:25:57 AM MST to CO Mock County District Court, via File & ServeXpress for the following case:

Case Number	Case Name	Division	Judge
2012CV227	In the Matter of Charles Harris	2 - Division 2	Judge District

The Transaction contained 1 document titled as follows:

ID	Document	Pages	Clerk Review Status
42724428	Petition to Seal Criminal Record	1	Accepted 02/27/2012 09:30:30 AM MST

The above-mentioned documents within this Transaction were sent to the following 0 recipients:

Should you have any questions about the details of the Transaction as stated above, please contact Customer Support at 1-888-529-7587.

Sincerely,
File & ServeXpress Holdings, LLC

Page 1 of 1

Adding a Case While E-Filing

Home **Filing & Service** Alerts Search

Start A Transaction | Saved Transactions | Scheduled Transactions

3/15/12 3:17 PM CDT

Select Court and/or Case for Filing

File and/or Serve in an Existing Case File a New Case File and/or Serve in Multiple Cases

Enter information in one or more boxes and click **Find**. Selection of a Court is required.

State: Case Name:

Court: Case Number:

To select a case for filing, click beside the case.

Case List	Show 50 results per page					
Case Number	Case Name	Case Type	Case Class	State	Court	County
No matches found. Please modify your search and try again.						

Can't find the case you are looking for?
Click on the **Add Case** button to enter your case information.

For assistance finding your case, call 1-888-529-7587. Want to add more cases for E-service? Contact a representative [online](#) or at 1-800-869-1910.

1. Search for your case on the Start a Transaction tab.
2. If you do not find your case and you are in a jurisdiction that allows use of the Add Case feature, click the **Add Case** button.

Adding a Case While E-Filing continued on next page...

Home Filing & Service Alerts Search

Start A Transaction | Saved Transactions | Scheduled Transactions

3/15/12 3:22 PM CDT

Add Case Information Transaction ID: Cancel Save & Close

Enter a case name and select a case type. Then click **Submit**.
 Note: new lines will be replaced by spaces.

Court Mock Court-Filing & Serving

* Case Class Civil ▾

* Case Type Personal Injury ▾

* Case Name
 (First Plaintiff vs First Defendant)
 Maximum length of text is 200 characters

* Case Number

Submit ?

1. From the drop down menu, select the Case Class and Case Type. You can only add cases that are in the available case types to be added in that court.
2. Enter the **case name** and the **case number** of the case you wish to add in the space provided. Click **Submit**.

Adding a Case While E-Filing continued on next page...

Adding A Case Tips:

- ✓ Only enter the abbreviated form of a case name. Do not list each party (i.e. Smith, Sue v Asbestos Defendants).
- ✓ If the plaintiff is an individual, enter “*last name, first name* v. defendant name”. Defendants do not need to be last name, first name.
- ✓ **Examples:**
 - Smith, Sue v. Asbestos Defendants et al. al.
 - Brown, Jack v. Bob White et al. al.
 - ABC Corporation v. Airline Industries et. al.

3/15/12 4:15 PM CDT

Case **Parties** Documents Sending Parties Service Add Recip Review&Submit

Add Case Parties Transaction ID: 43118758 Cancel Save & Close

2011CV1234 Stanhope, Ursela vs George Hetherford Mock Court-Filing & Serving

Enter the information for the party. Then click **Save Party**. To remove the party, select **Remove Party**. To add an alias for the party, select **Add Alias**.

Party represented by an Attorney in your Firm
 Party unrepresented or represented by an Attorney from another Firm

* Party Petitioner * Entity Individual

* Party Name First Name Middle Name Last Name Suffix
 Ursela S Stanhope

Phone () - ext.

Address 123 Imaginary Lane

City, State, Zip Seattle Washington 10202 -

* Attorney Payne, Justin * Attorney Type Attorney in Charge

Save Party Remove Party Add Alias Add New Party ?

[Create group with party list](#)
[View case party groups](#)

Parties in Case
 MP [Stanhope, Ursela S](#)

Adding A Case Tips:

- ✓ **Case Party Information:** Entering case party information will allow you to designate parties and attorneys to serve with copies of your transactions and will be available to you to use the next time you submit documents into the case you have added.
- ✓ **Note:** In order to serve parties and attorneys in an added case, you must enter all party information before continuing on the Case Parties tab.

1. Select **Party represented by an Attorney in your firm** from the radio buttons.
2. Select a **Party Type** from the drop-down menu.
3. Select an **Entity Type** from the drop-down menu (Individual or Organization).
4. Enter the party information (name, address, etc.) in the fields provided.
5. Enter the attorney information in the fields provided.
6. Click **Add Party**. The party name appears under the **Parties in Case** caption.
7. Repeat the steps to add additional parties represented by your firm.

Adding a Case While E-Filing continued on next page...

2011CV1234 Stanhope, Ursela vs George Hetherford Mock Court-Filing & Serving

Enter the information for the party. Then click **Save Party**. To remove the party, select **Remove Party**. To add an alias for the party, select **Add Alias**.[Create group with party list](#)[View case party groups](#)

Party represented by an Attorney in your Firm
 Party unrepresented or represented by an Attorney from another Firm

* Party * Entity

* Party Name First Name Middle Name Last Name Suffix
 George Hetherford

Phone () - ext.

Address

City, State, Zip Select a State -

Attorney Attorney Type

?

Parties in Case

MP [Stanhope, Ursela S](#)OP [Hetherford, George](#)

Adding A Case Tips:

- ✓ **Searching for Party Names:** To minimize data entry of party information, first **Search** for party names to add to cases as many corporate names are already listed in the database. See steps to **Search for Party Names** below.

1. To enter unrepresented parties or parties from another firm, click the radio button labeled **Party unrepresented or represented by an Attorney from another firm**.
2. Select a **Party Type** from the drop-down menu.
3. Select an **Entity Type** from the drop-down menu (Individual or Organization).
4. Enter the party name in the fields available.
5. The attorney default is **No Representation**. Click **Attorney** to search for an attorney from another firm.
6. Click **Add Party**. The party name appears under the **Party List**.
7. Repeat the steps to add additional parties unrepresented or represented by an attorney at another firm.
8. After entering all party information click the **Documents** tab to continue.
9. For detailed information on attaching **Documents**, selecting **Filing Parties**, designating **Service**, adding **Additional Recipients** and **Review & Submit** please see the first section of this quick Guide.

3/15/12 4:32 PM CDT Case **Parties** Documents Sending Parties Service Add Recip Review&Submit

Transaction ID: 43118758 Cancel Save & Close

2011CV1234 Stanhope, Ursela vs George Hetherford Mock Court-Filing & Serving

Find Parties by Party Name
 Find Parties by Case

Enter the party name you wish to search for (e.g. lastname, firstname or business).

Last or Business: First: Middle: Suffix:

Entity Type:

[Create group with party list](#)
[View case party groups](#)

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Select the party you wish to add to the case (or change your search criteria to find another party).

Party Name
Wonderland, Alice (Plaintiff)
Wonderland, Alice (Plaintiff)
Wonderland, Alice (Defendant)
Wonderland, Alice (Interested Party)
Wonderland, Alice (Petitioner)
Wonderland, Alice (Petitioner)
Wonderland, Amy (Plaintiff)
Wonderland, John (Plaintiff)

8 found.

Adding A Case Tips:

- ✓ **Note:** Party names are stored in File & Serve using standard naming conventions. They serve as placeholders only. Exact legal names, addresses, DOB and SS# information is not required nor stored for each party so that our clients have flexibility when searching for party names to add to the File & Serve case parties lists. Your pleadings, however, should contain the proper identification of parties sued.

1. **Find Party** You can **search for a party name** in File & Serve prior to entering it in. Click **Find Party** and a search screen appears.
2. Type in the **Last or Business** name of the entity you are searching for.
3. Click the Entity Type to search and click **Find**.
4. All parties with that name are displayed.
5. If your party name is in the list, click on the name to select.
6. The party name is added to the name field under *Case Parties*.
7. Click **Save Party**.
8. To add another new party, click **Add New Party**.

Adding a Party While E-Filing

The screenshot shows the 'Select Sending Parties' screen for transaction 03456-A. The 'Add Party/Attorney' button is highlighted. Below it, a table lists available parties:

Party	Party Type	Party Status	Attorney	Firm
<input type="checkbox"/> Catt, Cheshire	Plaintiff	Active	No Answer on File	Firm TBD

1. **Add Party/Attorney** If the party you are trying to file for is not available, if the court you are filing with allows you to submit an Add Party request with your filing, click the **Add Party** button.

Search to add a new party.

The search form includes the following fields and buttons:

- Entity:** Organization (dropdown menu)
- Party Name:** Cheshire Cat CO (text input field)
- Find** (button)
- Cancel** (button)

1. **Add Party/Attorney** If the party you are trying to file for is not available, if the court you are filing with allows you to submit an Add Party request with your filing, click the **Add Party** button.

Adding A Party Tips:

- ✓ **Note:** When adding or searching for a party, follow these simple rules:
 - For individuals, enter last name, first name (i.e. jones, billy).
 - Do not include “the” in company names.
 - Use “&” instead of the word “and”.
 - Avoid punctuation in company names.
 - Always abbreviate Inc., Corp., and Co.
 - If you want to add aliases (dba’s and aka’s), add them as separate parties.
 - Place a space between parties with initials in the name (i.e. A W Chesterson, A P Green).

Adding A Party Tips:

- ✓ **Note:** The party you are filing for is added to the filing in a pending status. When the document is reviewed by court personnel, the added party may be accepted or rejected. Once accepted, the party status will change from pending to active. If rejected, the filer will get notice that the party has not been added. Documents in the transaction may be rejected if the Clerk’s office opts to reject documents submitted by a rejected party.

Search to add a new party.

Entity:
 Party Name:

2. Select whether you are adding an individual or an organization.
3. Enter the party name.
4. Click **Find**.

Select a party and click Continue. If the party is not in the list you may change your search criteria and select Find or select Add Party to add a new party.

Party Name	Is an alias
<input type="radio"/> Cheshire Cat Co	No

Search to add a new party.

Party Name:

5. If a match is found, select the party by clicking the radio button next to the **Party Name** on the available list.
6. Click **Continue** and you will be brought to the following screen:

Entity: Organization
Type:
Party Name: Cheshire Cat Co
Attorney:
Attorney Type:

7. Select the party **Type** using the drop down menu.
8. Select the attorney from your office that represents the party and select an attorney type.
9. Click **Continue** when finished. You will be returned to the Sending Parties tab to complete the filing/service process.
10. If a match is not found, search again using different criteria, or click **Add Party** and create a new party entry.