

File & ServeXpress™

San Francisco Superior Court - All Cases

Using Case & Party Management

Purpose of the Case & Party Management Feature

The "Case & Party Management" feature is used to update the File & ServeXpress service lists. You can add or remove parties, firms and/or attorneys by using this feature.* You can also substitute firms or attorneys. The extent to which you will be permitted to use Case & Party Management in the asbestos cases depends on whether you are a plaintiff firm or defense firm. For more information, please refer to the separate procedures for updating the service lists in asbestos cases, which are posted on the San Francisco "Rules & Procedures" page located on the File & ServeXpress Resource Center. The remainder of this document explains how to use Case & Party Management when it is permitted.

General Procedure for Using Case & Party Management

1. Log in to File & ServeXpress with your user name and password. Note: You do not need to be your firm's designated File & Serve "Organization Administrator" to use Case & Party Management.
2. Click the link for "Case & Party Management" in the lower right corner of the screen under the heading "Toolbox".
3. Click the appropriate button.
 - a. Tip: To remove a party after a dismissal, or to remove an attorney from representing a party, click "Modify Party".
 - b. Tip: To replace one attorney from your firm with another attorney from your firm, click "Substitute Attorney".
4. Follow the resulting steps.
5. Please allow 24 hours for your requested changes to be processed.

Detailed Written Instructions on Using Case & Party Management

1. Log in to File & ServeXpress with your user name and password.
2. Click the link for "Resource Center" in the upper right corner of the screen.
3. Click the link for "Quick Guides" in the lower right corner of the screen.
4. Click the link in the list entitled "Case & Party Management". This link will open an Adobe Acrobat file which you may download or print for free.

* *Note: In addition to using Case & Party Management, both plaintiff and defense firms can add parties, firms and/or attorneys to the service lists "on the fly" when filing and serving documents on File & ServeXpress. To do so, use the "Add Party/Attorney" button located on the "Sending Parties" tab or the "Service" tab. Completion of the filing transaction is required for the changes to be applied.*