

Procedure to E-File & E-Serve into Case Groups

Note: A "case group" consists of asbestos cases that have been informally grouped together by the Court for trial purposes. By following the steps below, you will submit two transactions: one transaction to file into the lead case in the case group, and one transaction to serve into all or some of the cases in the case group.

To File Documents into a Lead Case in a Case Group

1. Select the "Filing & Service" tab to start a transaction.
2. Make sure the radio button next to "File and/or Serve in an Existing Case" is selected.
3. Find and select the lead case on the "Select Court and/or Case for Filing" screen.
4. Upload documents in the "Documents" tab and complete the "Sending Parties" tab, as usual.
5. Skip the "Service/Notice" tab. You will not be serving the documents in this transaction. You will serve the documents in a separate transaction, as detailed below.
6. Complete the rest of the steps for filing, as usual. Be sure to select "File with the court and Serve selected parties" in the "Review & Submit" tab (since no parties were selected, you will see a message indicating your document will be filed but not served).

To Serve Documents into All or Some of the Cases in a Case Group

1. Select the "Filing & Service" tab to start a transaction.
2. Click the radio button next to "File and/or Serve in Multiple Cases".
3. Next to "Court", choose "CA Superior Court County of San Francisco".
4. Next to "Case Class", choose "Civil".
5. There are several options for selecting your cases:
 - a. Option 1: Click the "Find" button. All San Francisco cases available for electronic filing will display in the resulting list. Click the column header for "Case Name" to sort alphabetically or "Case Number" to sort numerically. You can increase the number of cases displayed per page by using the pull-down

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located just above the column headers. Click the check box next to each case in which you want to electronically serve your documents.

- b. Option 2: Enter in a portion of the case name or number for the first case in which you want to electronically serve your documents. Click the “Find” button. Click the check box next to the first case. Repeat these steps for each case. You can click the “View Selected” button to see the cases you’ve selected as you build your list.
 - c. Option 3: If you have previously made the cases into a Case Group (see directions for how to do this in the next step below), click the “View Case Groups” button. Enter in a portion of the name of your Case Group and click the “Find” button. Click the check box next to your case group’s name and click the “Select” button.
6. When selecting your cases the first time, you’ll need to use Option 1 or Option 2 from the previous step above. At that time, you can also designate the cases you selected as a case group on File & ServeXpress so that the next time you serve into these cases you don’t need to select them one by one. To designate cases as a case group:
 - a. Immediately after completing Option 1 or Option 2 from the previous step above, type in the name by which you want to refer to your Case Group in the box next to the “Create Case Group” button.
 - b. Click the “Create Case Group” button.
 - c. To designate a case group as public (and therefore make it accessible to anyone in the litigation, including others in your office), click the “View Case Groups” button and find your case group. Click on the name of your case group. Click the radio button next to the word “Yes” underneath “Set this group to be Public?” Click the “Save & Select” button.
7. Complete the “Documents” tab, “Sending Parties” tab, “Service/Notice” tab and “Additional Recipients” tab as usual. Please note that if your party, firm and/or attorney is not listed on the “Sending Parties” tab, that means they are not on the service list for every case you have selected. Therefore, you will need to use the “Add Party/Attorney” button on the “Sending Parties” tab to add in your party, firm and/or attorney, which will apply to this transaction only. If you need to permanently change the service list on one or more of the cases you have selected, please refer to the Special Instructions posted on the Resource Center located on File & ServeXpress.
8. In the “Review & Submit” tab, be sure to select “Serve Only – Private” or “Serve Only – Public”. (“Serve Only – Private” means your documents will be available only to your firm and the firms you serve. “Serve Only – Public” means your documents will be available to anyone who purchases them from File & ServeXpress.) **Do not select “File with the court and Serve selected parties”** (because you have already filed your document in the lead case).