

File & Serve *Xpress*™

Road Rules for  
Successful e-Filing  
& e-Service



**San Francisco Superior Court**

San Francisco Superior Court  
PTR & PES Cases



# AUDIO

## Please check the Side Toolbar for Audio Info.

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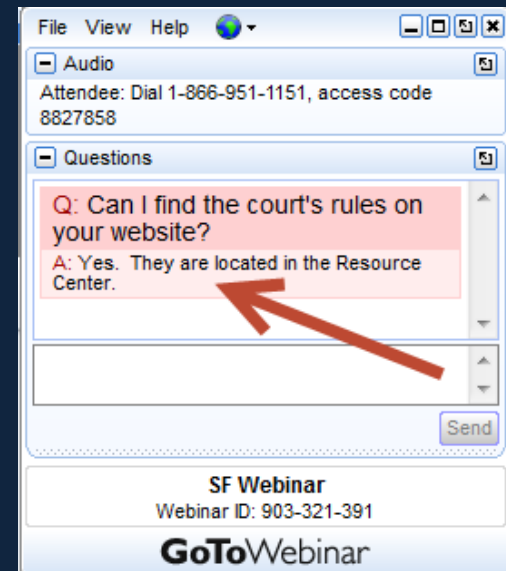
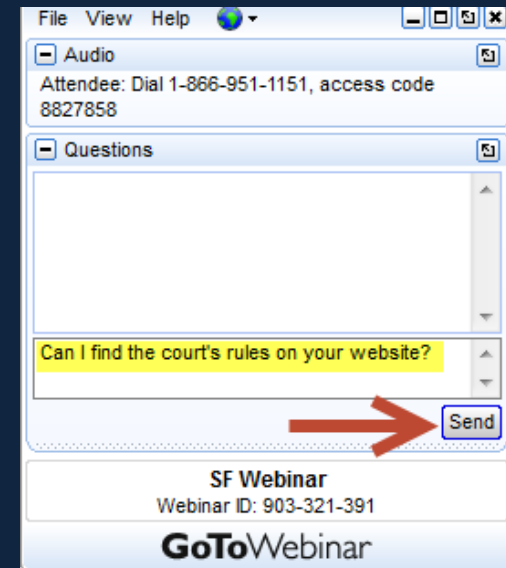
### Today's Class Materials

Available at end of class

- Website URL Will Be Provided
- You Will Also Receive An Email Reminder

### How To Submit A Question:

See Question Panel in the Upper  
Right Corner of Your Screen





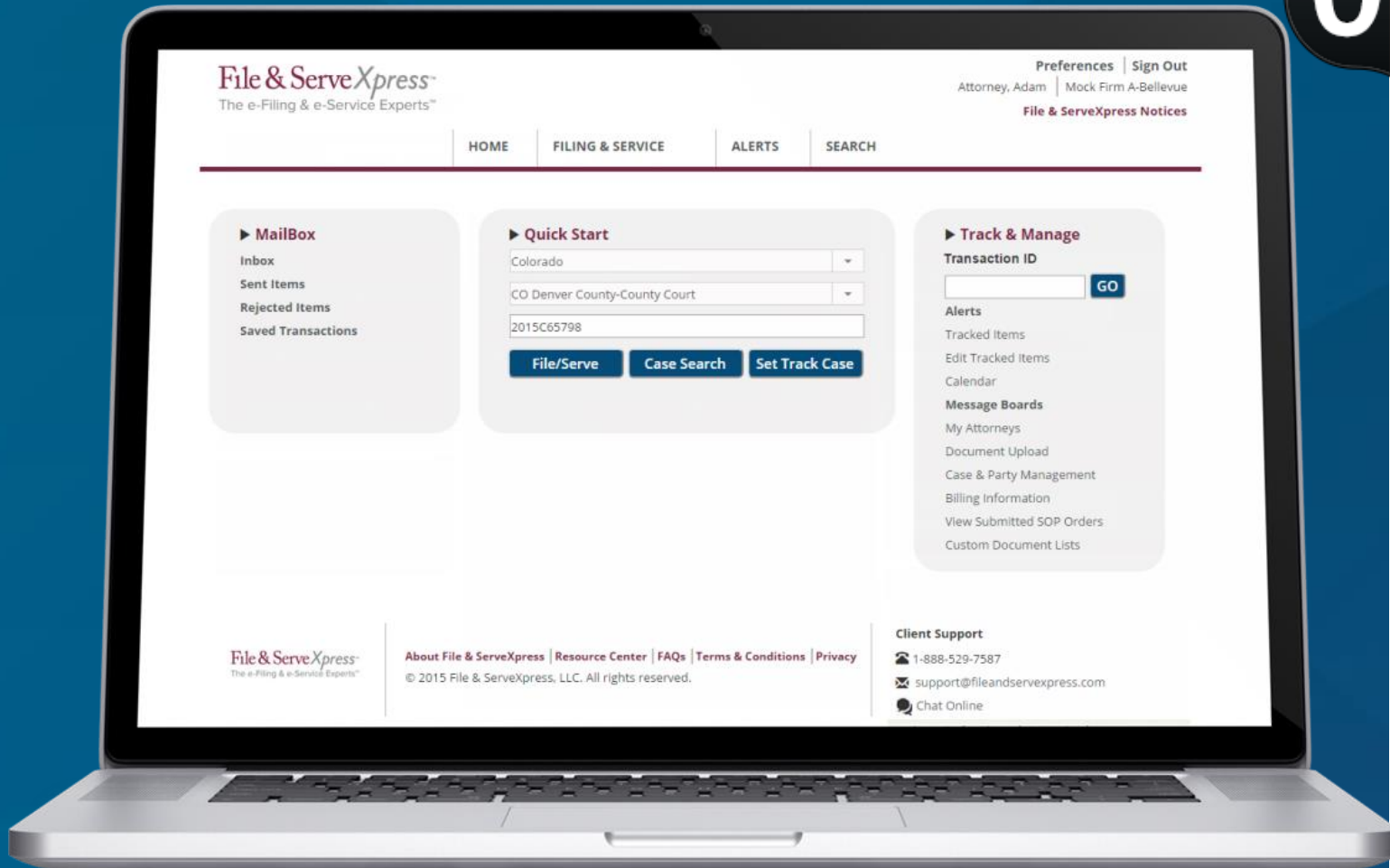
1 | How to Complete an e-Filing Transaction

2 | Case Types Available for e-Filing & e-Service

3 | Benefits of e-Filing and e-Service

4 | “Road Rules” for Successful e-Filing and e-Service

5 | Helpful Resources from the Court and File & ServeXpress



## HOW TO COMPLETE AN E-FILING TRANSACTION

## Case Types

**Asbestos** – mandatory  
**Complex Litigation** – mandatory  
**Probate (PTR, PES)** – mandatory  
**General Civil** – mandatory\*



*\*e-Filing is required in all case types except limited unlawful detainer and small claims.*



# **BENEFITS OF E-FILING & E-SERVICE**

**Time & Cost Efficiencies**

**Improved Case Management**

**Technical Advantages**

# TIME EFFICIENCIES

- **More time to prepare your documents.** e-Filings can be submitted from your computer until the 4:00 pm PT deadline.
- **You can even schedule a filing for the future** with the click of a mouse.
- **Receive immediate proof of delivery.** Eliminate uncertainty and lag time when you e-file and e-serve.
- **No more printing, collating, stuffing and addressing envelopes for service by mail.** Preparing cover sheets and waiting for confirmations for service by fax are a thing of the past when you e-Serve.

**REDUCE YOUR TIME TO FILE & SERVE**





## COST SAVINGS

- **Eliminate postage and/or courier costs and the need to arrange for a messenger.** Courier services in San Francisco can range from \$25 to \$200 to get just a few documents delivered to the court and filed!
- **e-File unlimited pages and e-Serve unlimited parties per transaction** all for one low cost. \$5.00 e-File/\$6.50 e-Serve







# IMPROVED CASE MANAGEMENT

- Pull up your cases and find documents in a few seconds, anytime, anywhere in the online case repository – no more searching through paper files or looking for misplaced documents.
- Receive a courtesy e-mail when you or your attorney is e-Served with new documents.
- Service lists can be updated anytime using Case & Party Management.
- Set up Alerts to stay on top of specific types of case activity, such as when a judge issues an order.
- Download discovery requests and convert to Word to save time in preparing your discovery responses.

**YOUR DOCUMENTS NEVER EXPIRE AND ARE ALWAYS  
INTACT AND AVAILABLE ONLINE**



## TECHNICAL ADVANTAGES

- No limit on the number of pages or size of documents that can be uploaded.
- No more lost documents in the mail or fax machine malfunctions. e-Filing and e-Service provides online proof that your documents were delivered.
- Documents are sent timely and securely. Each electronic transaction is assigned a unique trace number.
- Saves paper and reduces carbon footprint.



**EACH ELECTRONIC TRANSACTION IS ASSIGNED A  
UNIQUE TRACE NUMBER**



**See Local Rules 2.10, 14.100,  
and the Special Instructions  
to view the complete court  
requirements.**

# Basic Filing Requirements

- Check Basic Filing Requirements:
  1. Correct Case name;
  2. Correct Case Number; and
  3. Completed forms, signatures, and dates.

Note:

Dates must accompany signatures.

1

2

## Capacity

- Include the Capacity at the top of the document after, e.g., “Attorney for John Jones, Executor.”

*See, San Francisco Superior Court  
Local Rule (SFLR) 14.17*

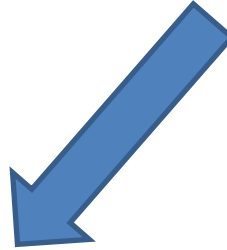
3

## Format / First Page (Caption)

- The entire format of the first page must comply with *California Rules of Court (CRC) 2.111.*

*See, CRC 2.100, et seq.*

1 [REDACTED]  
2 1514 Taraval Street  
3 San Francisco, CA 94116  
4 Phone: (415) 753-8080  
5 Facsimile: (415) 753-8090  
6 [REDACTED]



7  
8  
9 **SUPERIOR COURT OF THE STATE OF CALIFORNIA**  
10 **IN AND FOR THE COUNTY OF SAN FRANCISCO**

11  
12 In the Matter of the Estate of: ) Case No.: PTR-03-[REDACTED]  
13 ) )  
14 [REDACTED] ) **DECLARATION OF [REDACTED]**  
15 ) **[REDACTED] RE: FEES FOR SERVICES**  
16 Deceased. ) **AS INTERIM TRUSTEE**  
17 ) Date:  
18 ) Time: 9:00 a.m.  
19 ) Dept.: Probate, 204

20 I, [REDACTED], pursuant to Order Approving Petition for Appointment of  
21 Successor Trustee filed with this Court on December 4, 2012, was the successor trustee of the  
22 above referenced trust. Declarant has agreed with the present Successor Trustee, [REDACTED],  
23 for him to pay myself a flat fee of \$700.00 for fees for my services rendered as interim trustee.

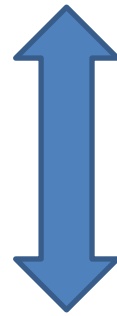
24 I declare under penalty of perjury under the laws of the State of California that the  
25 foregoing is true and correct.

26 Dated this 30<sup>th</sup> day of September, 2013 at San Francisco, California.

27 [REDACTED]  
28 [REDACTED]

The Court name  
should start at least  
3 1/3 inches from  
the top of the page  
(usually line 8), per  
CRC Rule 2.111.

1 [REDACTED]  
2 1514 Taraval Street  
3 San Francisco, CA 94116  
4 Phone: (415) 753-8080  
5 Facsimile: (415) 753-8090  
6 [REDACTED]



7  
8  
9 **SUPERIOR COURT OF THE STATE OF CALIFORNIA**  
10 **IN AND FOR THE COUNTY OF SAN FRANCISCO**

11  
12 In the Matter of the Estate of: ) Case No.: PTR-03-[REDACTED]  
13 )  
14 [REDACTED] ) **DECLARATION OF [REDACTED]**  
15 ) **[REDACTED] RE: FEES FOR SERVICES**  
16 Deceased. ) **AS INTERIM TRUSTEE**  
17 )  
18 ) Date:  
19 ) Time: 9:00 a.m.  
20 ) Dept.: Probate, 204

21 I, [REDACTED], pursuant to Order Approving Petition for Appointment of  
22 Successor Trustee filed with this Court on December 4, 2012, was the successor trustee of the  
23 above referenced trust. Declarant has agreed with the present Successor Trustee, [REDACTED],  
24 for him to pay myself a flat fee of \$700.00 for fees for my services rendered as interim trustee.

25 I declare under penalty of perjury under the laws of the State of California that the  
26 foregoing is true and correct.

27 Dated this 30<sup>th</sup> day of September, 2013 at San Francisco, California.

28   
[REDACTED]

The attorney & party information shouldn't extend beyond the center of the page, per CRC Rule 2.111.



4

## Department Number

- Be sure to put the correct Department Number on your pleading papers.
- The Probate calendars are heard in Dept. 204.
- Probate Ex-Parte appearances are heard in Dept. 202.

5

## Multiple Duplicate Documents

- Documents that are filed in multiples, such as receipts, consents, waivers or nominations should be submitted together in one submission with one caption page identifying the documents, i.e., “Receipts on Distribution (15), rather than submitting 15 separate receipts.

**Exception:** Multiple fee payments are filed same transaction, uploaded separately (e.g., previously exempt or waived fees).

6

## Notice of Hearing

- The Notice of Hearing is submitted after the Proof of Service is completed.
- You don't have to file a blank copy of the Notice of Hearing.
- Only e-file the Notice of Hearing once the petition is served and the form is filled out.

7

## Signature Formats\*

- Remember to sign your documents!
- Handwritten signatures must be used on documents signed under penalty of perjury.
- Otherwise, typographic signatures are permitted.

\*See, SFLR 2.10(N)

## TYPOGRAPHICAL SIGNATURE (EXAMPLE)

This is the proper format for a  
typographical signature

8	SUPERIOR COURT OF THE STATE OF CALIFORNIA	
9	COUNTY OF SAN FRANCISCO	
10		
11	KAISER ALUMINUM & CHEMICAL	) Case No.: CGC-00-312415
12	Plaintiff,	)
13	vs.	) ANSWER TO FIRST AMENDED
14	LONDON MARKET INSURERS	) COMPLAINT
15		)
16	<u>Defendant.</u>	)
17	<hr/>	
18		
19	Dated February 28, 2014	Mock Firm A-Bellevue
20		By: <u>/s/ Adam Attorney</u>
21		Adam Attorney
22		

## TYPOGRAPHICAL SIGNATURE (EXAMPLE)

This is the proper format for a  
handwritten signature

23 I declare under penalty of perjury under the laws of the State of California that the foregoing  
24 is true and correct and that this declaration was executed on **February 28, 2014**, in San Francisco,  
25 California.

26

27

28

  
-Adam Attorney

8

## Exhibits

- **Four Options:**

1. Upload exhibits attached to the document to which they pertain.

*Example: Upload a declaration with exhibits all as one document*

2. Upload exhibits as individual documents.

*Example: Upload exhibits A, B and C as 3 separate documents*

3. Upload a group of small exhibits as one document.

*Example: Upload exhibits A-C as one document*

4. Upload a large exhibit as several documents.

*Example: Break down exhibit A into 3 parts and upload them as 3 separate documents*

- **Must add a caption page for all options**

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[Redacted]

135 Main Street, 20<sup>th</sup> Floor  
San Francisco, CA 94105  
Telephone: (415) 808-0300  
Facsimile: (415) 808-0333  
Email: [Redacted]

Attorneys for Defendant  
[Redacted]

SUPERIOR COURT – STATE OF CALIFORNIA  
COUNTY OF SAN FRANCISCO – UNLIMITED JURISDICTION

[Redacted]

Plaintiff,  
vs.

[Redacted]

[Redacted]

Plaintiff,  
v.

[Redacted]

Defendants.

Case No. [Redacted]

DECLARATION OF [Redacted]  
IN SUPPORT OF  
DEFENDANT [Redacted]  
MOTION FOR SUMMARY  
JUDGMENT, OR IN THE ALTERNATIVE,  
SUMMARY ADJUDICATION AND  
EXHIBITS A-C

I, [Redacted], declare as follows:

1. I am an attorney licensed to practice before all the courts of the State of California and an associate with the law firm of [Redacted] attorneys of record for Defendant [Redacted] in the above-referenced

**OPTION 1 - EXAMPLE:**  
  
Caption page for a document with the exhibits attached at the end



1 [REDACTED]  
2 Attorney General of California  
3 [REDACTED]  
4 Supervising Deputy Attorney General  
5 [REDACTED]  
6 Deputy Attorney General  
7 1515 Clay Street, 20th Floor  
8 P.O. Box 70550  
9 Oakland, CA 94612-0550  
10 Telephone: (510) 622-2183  
11 Fax: (510) 622-2270  
12 E-mail: [REDACTED]  
13 Attorneys for [REDACTED]

8 SUPERIOR COURT OF THE STATE OF CALIFORNIA  
9 COUNTY OF SAN FRANCISCO

12 [REDACTED], an individual,  
13 Plaintiff,  
14 v.  
15 [REDACTED] et al.,  
16 Defendants,  
22 CONSOLIDATED CASES

Lead Case No. [REDACTED]  
(Consolidated with [REDACTED])

**EXHIBIT A TO DECLARATION OF [REDACTED] IN SUPPORT OF ATTORNEY GENERAL'S OBJECTION TO MOTION TO APPROVE [REDACTED] AND FOR ENTRY OF CONSENT JUDGMENT AS TO [REDACTED]**

Date: January 24, 2014  
Time: 10:30 a.m.  
Dept: 305  
Judge: Hon. John E. Munter

Health & Saf. Code, § 25249.7(f)(5)

**OPTION 2 - EXAMPLE:**  
Caption page for an exhibit  
uploaded as a separate  
document

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[Redacted]

3102 Oak Lawn Ave., Suite 1100  
Dallas, TX 75219  
Telephone: 214/521-3605; 800/222-2766  
Facsimile: 214/520-1181

Attorneys for Plaintiff

SUPERIOR COURT OF THE STATE OF CALIFORNIA  
COUNTY OF SAN FRANCISCO - UNLIMITED JURISDICTION

[Redacted] Individually and as )  
Successor-In-Interest to [Redacted] )  
PINO, Deceased, [Redacted] )  
and [Redacted] )  
Plaintiffs, )  
vs. )  
[Redacted] et al. )  
Defendants. )

Case No: [Redacted]

EXHIBITS A-C TO DECLARATION OF  
[Redacted] IN SUPPORT OF  
PLAINTIFFS' OPPOSITION TO [Redacted]  
[Redacted] MOTION FOR  
SUMMARY JUDGMENT OR, IN THE  
ALTERNATIVE, SUMMARY  
ADJUDICATION

Date: January 16, 2014  
Time: 9:30 a.m. PST  
Dept.: 503  
Honorable Teri L. Jackson

Complaint Filed: May 10, 2012  
Trial Date: February 18, 2014

**OPTION 3 - EXAMPLE:**  
Caption page for a group  
of exhibits uploaded as  
one document

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[Redacted]

601 California Street, 21<sup>st</sup> Floor  
San Francisco, California 94108  
Telephone: (415) 658-2929  
Facsimile: (415) 658-2930

Attorneys for Defendant

[Redacted]  
formerly known as [Redacted]

SUPERIOR COURT FOR THE STATE OF CALIFORNIA  
COUNTY OF SAN FRANCISCO

[Redacted]  
Plaintiff,  
v.  
[Redacted]; Defendants as  
Reflected on Exhibit I attached to the  
Summary Complaint herein; and DOES 1-  
8500.  
Defendants.

CASE NO. [Redacted]  
**EXHIBIT F (PART 1) TO THE  
DECLARATION OF [Redacted]  
IN SUPPORT OF [Redacted]  
formerly known as [Redacted]  
MOTION FOR  
SUMMARY JUDGMENT, OR, IN THE  
ALTERNATIVE, SUMMARY  
ADJUDICATION OF ISSUES**  
Hearing Date: March 20, 2014  
Time: 9:30 a.m.  
Dept.: 503  
Judge: Hon. Teri L. Jackson  
Action Filed: January 31, 2012  
Trial Date: April 21, 2014

**OPTION 4 - EXAMPLE:**  
Caption page for a large exhibit broken down into several documents  
(this is part 1 of 3)

**EXHIBIT A**

This is not an acceptable caption page (first page) for a document containing exhibits.

A properly formatted caption page (with case name, case number, etc.) must be used as the first page or your document will be REJECTED.

## **EXHIBIT B**

### **SLIP SHEET – EXAMPLE**

This is an acceptable slip sheet to separate exhibits contained in the same document.

Do not use blank pages as slip sheets or your document will be REJECTED.

# Exhibits

- Best to choose the option that:
  - Results in a maximum size of 5 MB
  - Usually 50-100 pages if using recommended scanner settings of 300 dpi, Black & White (not color or grayscale), 8 ½ x 11 (100%)
- Must use slip sheets (not blank pages) to separate exhibits
- Refer to Special Instructions for:
  - Detailed explanation of information presented here
  - Different requirements for exhibits that are part of a proposed orders, stipulations & orders, judgments & verdicts

9

## Bank Statements / Bonds

- When filing a bond or bank statements, a “Declaration of Retention of Original Document” must be filed in the same transaction. *See, SFLR 14.100.\**

*\*The rule number changes to 14.89 on 1/1/16.*

10

## The following documents must be filed in Paper:

- Fee Waiver Applications (mandatory paper only)
- Letters Of...(mandatory paper only)
- Inventory AND Appraisals (mandatory paper only)
- Original Wills/Condicils (mandatory paper only)



10

## The following documents must be filed in Paper:

- Bond (optional paper or e-filed)\*

\*If e-filed, a declaration of retention of original must accompany the bond filing in the same transaction.

- All “Issued (by the court) Documents” (mandatory paper only)
- All Confidential Documents (mandatory paper only)
- Will Contests (mandatory paper only)

11

## Stipulations, Proposed Orders

- A Stipulation and a Proposed Order must be filed as two separate documents.
- Select the document type “Stipulation (w/ separate proposed order).”
- Proposed Orders should be submitted in an editable format – Word is preferred by the Court. *Remember to upload separately with a caption page. No run-on documents!*
- A lodged Proposed Order will not appear on the Court’s Register of Actions.
- A hard copy of the original Proposed Order must be delivered to Room 202.

12

## Ex-Parte Applications

- A Hearing is not required
- The filed-stamped courtesy copy must be delivered to Room 202 with the original Proposed Order.

13

## Run-On Documents

- Run-on documents are not permitted.
- EXAMPLE - If you have:
  - ex parte application
  - memorandum of points & authorities
  - declaration

These documents can be e-filed in *one transaction*, but should be *uploaded as 3 separate documents*, each with the appropriate caption page as a cover sheet.

Case number: 478453 [View Case History]

Filed and served at 3/13/2013 11:43 AM PDT

Case name: Beacon Residential Community Association vs Catellus Third & King LLC et al

Court: CA Superior Court County of San Francisco

Judge: Karnow, Curtis

View all document(s) as a list  View document(s) inline

Document List (2) Total Statutory Fees: \$0.00

Main Document, 6 pages ID: 65689460

[Document History](#) | [PDF Format](#) | [Original Format](#)

Document type: Application

Clerk review status/action: Rejected

Security: Public

Date reviewed: 3/14/2013

Statutory fee: \$0.00

Document title: PLAINTIFF'S NOTICE OF AND EX-PARTE APPLICATION FOR AN ORDER SHORTENING TIME FOR HEARING PLAINTIFF'S MOTION FOR A SEPARATE TRIAL OF CLAIMS AGAINST DEFENDANTS SKIDMORE-OWINGS-MERRILL & HKS ARCHITECTS, INC., TO RESET TRIAL DATE FOR JUNE 3, 2013, WITH MARCH 29, 2013 CASE MANAGEMENT CONFERENCE; MEMORANDUM IN SUPPORT OF; DECLARATION OF [REDACTED] IN SUPPORT OF [CCP §§ 1005 (b)]

1 **EX-PARTE APPLICATION FOR ORDER SHORTENING TIME:**

2 Plaintiff Beacon Residential Community Association hereby applies for an Order, pursuant  
3 to Code of Civil Procedure § 1005 (b), Shortening Time to hear Plaintiff's Motion for Separate  
4 Trial of Claims Against Defendants Skidmore-Owings-Merrill and HKS Architects, Inc. and to  
5 Reset Case for Trial ("Motion") so that it can be heard contemporaneously with the March 29,  
6 2013 Case Management and Trial Setting Conference. Plaintiff's case has been pending for nearly  
7 five years, and was set for trial on February 4, 2013 until the trial date was vacated through no  
8 fault of Plaintiff. Considerations of efficiency and judicial economy mandate that this motion be  
9 heard at the same time the court sets this case for trial.

10 **MEMORANDUM IN SUPPORT OF APPLICATION FOR AN ORDER SHORTENING**  
11 **TIME**

## REJECTED EXAMPLE

This document  
would be rejected  
because it's 3  
documents  
combined into one  
run-on document.

1 legal fees, consultants' fees and out of pocket costs in connection with the litigation. Owners of the  
2 units have great difficulty refinancing and selling their property because of the lawsuit and the  
3 unrepaired conditions. Facts in support of these statements are contained in the Declaration of  
4 Anthony Lin in support of Plaintiff's Motion.

5 The court may grant a hearing on shortened time pursuant to California Code of Civil  
6 Procedure 1005(b) and California Rules of Court 3.1201.

7 DECLARATION OF [REDACTED] 'IN SUPPORT OF

8 I, [REDACTED], declare:

- 9 1. I am the principal of the Law Offices of [REDACTED] and am one of the attorneys of  
0 record for Plaintiff BEACON RESIDENTIAL COMMUNITY ASSOCIATION  
1 in the above-entitled action. I am duly licensed to practice before all of the courts

**ACCEPTED EXAMPLE:**

This transaction would be accepted because the 3 documents have been uploaded separately.

Document List (5) Total Statutory Fees: \$60.00	
<b>Main Document, 3 pages ID: 66258717</b> <a href="#">Document History</a>   <a href="#">PDF Format</a>   <a href="#">Original Format</a>	
<b>Document type:</b> Ex Parte Application	<b>Clerk review status/action:</b> Accepted
<b>Security:</b> Public	<b>Date reviewed:</b> 4/3/2013
<b>Statutory fee:</b> \$60.00	
<b>Document title:</b> EX PARTE APPLICATION FOR ORDER SHORTENING TIME ON PLAINTIFF'S MOTION TO COMPLY AND FOR SANCTIONS	
<b>Supporting 66258717, 3 pages ID: 66258718</b> <a href="#">Document History</a>   <a href="#">PDF Format</a>   <a href="#">Original Format</a>	
<b>Document type:</b> Memorandum of Points and Authorities	<b>Clerk review status/action:</b> Accepted
<b>Security:</b> Public	<b>Date reviewed:</b> 4/3/2013
<b>Statutory fee:</b> \$0.00	
<b>Document title:</b> MEMORANDUM OF POINTS AND AUTHORITIES IN SUPPORT OF EX PARTE APPLICATION FOR ORDER SHORTENING TIME ON PLAINTIFF'S MOTION TO COMPLY AND FOR SANCTIONS	
<b>Supporting 66258717, 13 pages ID: 66258720</b> <a href="#">Document History</a>   <a href="#">PDF Format</a>   <a href="#">Original Format</a>	
<b>Document type:</b> Declaration	<b>Clerk review status/action:</b> Accepted
<b>Security:</b> Public	<b>Date reviewed:</b> 4/3/2013
<b>Statutory fee:</b> \$0.00	
<b>Document title:</b> PADIAN DECLARATION IN SUPPORT OF EX PARTE APPLICATION FOR ORDER SHORTENING TIME ON PLAINTIFF'S MOTION TO COMPLY AND FOR SANCTIONS	

14

## Document Titles

- The title that you type into File & ServeXpress must be an exact match to the title on the caption page for your document, (see, SFLR 2.10 (O)).
- Do not add “Corrected” or “Revised” to the document title of a previously rejected document → Title the document as if submitting for the first time.



1 Adam Attorney (SBN 999999)  
2 Mock Firm A  
3 123 Main St, Ste 100  
4 San Francisco, CA 92104  
5 Telephone: (999) 999-9999  
6 Facsimile: (999) 999-9999

7 Attorney for Defendant, Acme Corporation

8 SUPERIOR COURT OF THE STATE OF CALIFORNIA

9 COUNTY OF SAN FRANCISCO

10 KAISER ALUMINUM & CHEMICAL )

Case No.: CGC-00-312415

11 Plaintiff, )

12 vs. )

ANSWER TO FIRST AMENDED  
COMPLAINT

13 LONDON MARKET INSURERS )

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16 )  
17 )

## REJECTED EXAMPLE

Title should be "Answer to First Amended Complaint", so the document title matches the title on the caption page.

Document List (1) Total Statutory Fees: \$0.00

Main Document, 3 pages ID: 47223061

[Document History](#) | [PDF Format](#) | [Original Format](#)

Document type: Answer

Clerk review status/action: Rejected

Security: Public

Date reviewed: 3/3/2014

Statutory fee: \$0.00

Document title: Answer

Submit Date	Review Status	Reviewer	Reason	Comment	Document Type	Document Title	Access Type	Statutory Fee
Mar 3 2014 6:14PM MST	Rejected (3/3/2014)	Reviewer, Mock	Other:	Document Title does not match the title on the caption page. Titles must be an exact match. Please correct and resubmit.	Answer	Answer	Public	CIVL - Civil Action Fee \$45.00 USER - User Fee \$40.00 CSCF - Court Security Cash Fund \$5.00 JBUD - Judicial Building Fund \$68.00 Total \$158.00
Apr 7 2011 12:23PM MDT	Pending			Document created	Answer	Answer	Public	\$0.00

Close

## ACCEPTED EXAMPLE

The document title on the caption page matches the document title entered in the "Title" field.

1 Adam Attorney (SBN 999999)  
2 Mock Firm A  
3 123 Main St, Ste 100  
4 San Francisco, CA 92104  
5 Telephone: (999) 999-9999  
6 Facsimile: (999) 999-9999  
7  
8 Attorney for Defendant, Acme Corporation  
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SUPERIOR COURT OF THE STATE OF CALIFORNIA  
COUNTY OF SAN FRANCISCO

KAISER ALUMINUM & CHEMICAL	)	Case No.: CGC-00-312415
	)	
Plaintiff,	)	
vs.	)	ANSWER TO FIRST AMENDED COMPLAINT
LONDON MARKET INSURERS	)	
	)	
<u>Defendant.</u>	)	

Type: Answer (Original)

Statutory Transaction Fee: \$450.00

File:  Browse... or  Check here to fax your document ?

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

Title: Answer to First Amended Complaint  
Maximum length of text is 510 characters

Attach Document ?

### Attached Documents List:

No Documents have been attached to this transaction.

15

## Proofs of Service

- **Must be uploaded as separate documents, except where the Proof of Service is incorporated into a Judicial Council Form.**



## Obtaining Hearing Dates/Times

### Requests for Special Settings for Hearings

If the Hearing has NOT been set yet –

- Hand deliver the petition and declaration of need for the special setting to the Assistant Probate Director at the Court (same procedure as before e-filing).
- If approved, she will write the hearing date and time on the petition and initial it.
- Scan the petition (with the handwritten hearing date/time) and e-file it.
- In the “Note To Clerk” field at the “Review & Submit” enter a note that the hearing date/time has been approved by the Assistant Probate Director.

16

## Obtaining Hearing Dates/Times

### Requests for Special Settings for Hearings

If the Hearing has ALREADY been set –

- Follow the procedure below to obtain a hearing date/time for an ex parte matter (i.e., ex parte petition to advance hearing date).

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## Obtaining Hearing Dates/Times

### Law & Motion and Discovery Hearings

- Call the courtroom clerk in Dept 204 to obtain a hearing date/time (new procedure).
- Add the hearing date/time to the caption page of your moving papers, along with the words “Approved by (first name of courtroom clerk)” and e-file them.

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# Obtaining Hearing Dates/Times

## Law & Motion and Discovery Hearings

### Hearings on Subsequent Ex Parte Matters & Petitions

- E-file your moving papers with the hearing date/time blank (new procedure).
- In the “Note To Clerk” field at the “Review & Submit” tab, enter any dates your attorney is not available for a hearing.
- If accepted for e-filing, the Court will apply a stamp with the hearing date/time on the caption page of your PDF.
- You will also receive an “accepted with edits” e-mail that contains the hearing date/time.

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## Obtaining Hearing Dates/Times

### Law & Motion and Discovery Hearings

- You must first obtain a hearing date/time from the Courtroom Clerk before filing a Probate motion.
- Motion dates need approval from the Courtroom Clerk.
- The name of the Courtroom Clerk who provided the date should be written on the document next to or under the hearing date on the pleading/motion.\*

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## Discovery

- Don't e-file discovery (*interrogatories, requests for productions, deposition notices, etc.*)
- Don't e-file correspondence between firms

→ **Select the “E-Serve Only” option instead**

# Helpful Court Resources

- **Court's Website:** [www.sfsuperiorcourt.org](http://www.sfsuperiorcourt.org)
  - Civil Case Management Page: <http://www.sfsuperiorcourt.org/divisions/civil/civil-case-management>
  - Law & Motion / Discovery Page: <http://www.sfsuperiorcourt.org/divisions/civil/law-motion>
  - Complex Civil Litigation Page: <http://www.sfsuperiorcourt.org/divisions/civil/litigation>
  - Asbestos Page: <http://www.sfsuperiorcourt.org/divisions/civil/asbestos>
- **e-Filing Local Rules 2.10 (civil) & 14.100 (probate):** <http://sfsuperiorcourt.org/general-info/local-rules>
- **General Order No. 158 (asbestos)**  
<http://sfsuperiorcourt.org/sites/default/files/images/Case%20Management%20Order%20Feb%202014.pdf>
- **e-Filing Special Instructions:**  
<https://resourcecenter.fileandserve.com/resourcecenterwebui/rules.aspx?courtID=225>
- **e-File Unit**
  - General Civil, Asbestos and Complex Litigation Cases: (415) 551-3824
  - Probate Trust Cases: (415) 551-3892
  - Defaults: (415) 551-5921 or (415) 551-5969
- **California Rules of Court for e-Filing & e-Service, Rules 2.250 - 2.261:**  
<http://www.courts.ca.gov/cms/rules/index.cfm?title=two>
- **California Judicial Council Forms:** <http://www.courts.ca.gov/forms.htm>



# Need Help?

File & ServeXpress is here.

## San Francisco Microsite

<http://info.fileandservexpress.com/san-francisco/welcome>

## Online Training

Webinar Classes Available

(Register Through File & ServeXpress Resource Center)

## Onsite Training

Available for groups of 10 or more.

Send requests to:

[fsxtrainingcalifornia@fileandservexpress.com](mailto:fsxtrainingcalifornia@fileandservexpress.com)

## Resource Center

- e-Filing Rules
- Tips for e-Filing into Specific Jurisdictions

## Client Services (24/7)

888-529-7587

[info@fileandservexpress.com](mailto:info@fileandservexpress.com)

[www.fileandservexpress.com](http://www.fileandservexpress.com)

## To Access:

- Course Materials

<http://info.fileandservexpress.com/sfwebinar/classmaterials>