File & ServeXpress™

Judge Review
User Guide

Judge Review

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File & ServeXpress
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 & ServeXpress by clicking on the Resource Center link at the bottom 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** is where you can find password help, what's new and any important information like scheduled maintenance or system changes. Click here to access the login page.

» **File & ServeXpress Notices** is an information page that is available on the top, right-hand side of the File & ServeXpress Home tab, once you sign into File & ServeXpress. 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.

Judge Review Overview

Home Page Orientation:

✓ **Mailbox:**

- The Judge Review feature serves as the "Inbox" for processing documents that require judicial action, as well as notifying parties of actions taken. For example, motions can be granted and orders can be issued with a signature stamp. In addition, documents that are submitted in an editable format (e.g. proposed orders) can be revised, finalized, and sent to parties.

- All recent filing and service activity will be displayed in hyperlinks in the Mailbox on the Home tab (Items for Clerk Review, batches for Clerk Review, Items for Judge Review, Inbox, Sent Items, Rejected Items, and Saved Transactions). New activity is indicated by the category description appearing in bold text.

✓ **Track & Manage:**

- You can create a list of cases to get an "at-a-glance" view of filing and service activity by searching for the cases and adding them to your Tracked Items.

- You can set up an Alert for notification of and access to newly filed documents based upon specific search criteria.

Items for Judge Review

Items for Judge Review:

If you have received notification, click the Items for Judge Review link. Your notifications are displayed in a table with the oldest transactions on top. The columns in the table include:

- ✓ **Transaction ID:** A unique identifier assigned to each transaction submitted through File & Serve. The TID is hyperlinked and access to additional information and judge review screens are available via this link.
- ✓ **Date/Time (ET):** The date and time the transaction was first submitted to File & Serve. This can also be used as the file-stamp.

- ✓ **Items for Judge Review –** Contains all transactions that are pending judicial review.

- ✓ Columns headings are sortable by clicking on the column heading you want to sort by.

- ✓ Within the Items for Judge Review work area, there are different Filters a user can access.

- ✓ **Court:** The Court the transaction is being filed into.
- ✓ **Case Number:** The Court's numeric or alphanumeric identifier for the case.
- ✓ **Case name:** The abbreviated form of the case name assigned to the case.
- ✓ **Authorizer:** The name of the attorney submitting the transaction.
- ✓ **Authorizer Organization:** The firm associated with the attorney submitting the transaction.
- ✓ **Document Type:** The type of the document that needs to be reviewed.
- ✓ **Document Title:** The title of the document that needs to be reviewed.
- ✓ **Review Status:** This indicates whether the document has been reviewed or is still pending.
- ✓ **Size:** The size, in Megabytes, of the document waiting to be reviewed.

Items for Judge Review:

- ✓ If a transaction is being reviewed by someone else, you can view the documents but cannot take any review action. A lock icon will appear next to the transaction to indicate that it is being reviewed by another judge.

- ✓ Each court can select the length of time a document can remain locked.

- ✓ The different filters will help prioritize work items based on information such as a date range, the authorizing attorney, document types, case name or number, and a particular transaction.

Reviewing Transactions

To move on documents (i.e. grant, deny, moot, grant-in-part, deny-in-part) in your Judge Review Inbox, take the following steps:

Case number: 2017C1077 [View Case History]
Case name: Mock Collections Agency vs Tom Thomas
Court: QA Court
Division: 1 - Division 1
Judge: Judgea, Qa H

Filed and served at 11/14/2017 2:05 PM PST
No calendar event scheduled

Authorizer: Judgea, Qa H ▼
○ View document(s) for judge review   ● View all document(s) as a list   ○ View document(s) inline

Document List (2)   Total Statutory Fees: $0.00

Main Document, 1 page   ID: 67222826
Document History | PDF Format | Original Format

Document type: Proposed Order	**Judge review status/action:** Pending ▼
Security: Public	
Statutory fee: $0.00	
Document title: Proposed Order re: Default Judgment	

1. Click on the Transaction ID 52479918 of the Transaction you wish to review. This is located in the far left hand column of the list of documents waiting to be reviewed. This will take you into the Transaction so that you can review it.

2. The Document List provides you with all of the details of each document, such as filing fee information, title, document type and hyperlinks to view the original and PDF versions of each document, as well as a link to the document history.

3. The Application allows the user to change the authorizing judge on transactions. The dropdown of judge names is located directly above the Document List and will include any judges for whom the user has judge review rights. Change the Authorizer by clicking on the dropdown list and choosing the appropriate Judge.

Reviewing Transactions:

✓ You have the option to view only those documents sent to Judge Review or to view all documents in the Transaction by choosing the appropriate Radio Button located just above the Document List.

✓ As a Judge user, the system will default to your name as the authorizer.

✓ As a Clerk user, the system will default to display the name of the judge to whom the transaction was originally routed.

4. Click on the PDF link to view the document that you wish to move upon.

5. Choose whether you want to Grant, Deny or otherwise move upon the document by choosing the appropriate action from the Judge review status/action field.

Document List (2)   Total Statutory Fees: $0.00

Main Document, 1 page   ID: 67222825
Document History | PDF Format | Original Format

Document type:	Motion for default judgment	Clerk review status/action: Accepted
Security:	Public	Date reviewed: 11/14/2017
Statutory fee:	$0.00	
Document title:	Motion for Default Judgment	

Main Document, 1 page   ID: 67222826
Document History | PDF Format | Original Format

Document type:	Proposed Order	Judge review status/action: Pending ▼
Security:	Public	
Statutory fee:	$0.00	
Document title:	Proposed Order re: Default Judgment	

Pending
Denied
Accepted
Accepted with Edits
Granted
Denied in Part
Granted in Part
Moot
TEST

Continue >>

6. Click Continue.

7. This brings you to your **Judicial Communication** page. You have the option to add comments to this Review, or you can merely update the Judge Review status without comment. Choose the appropriate radio button for your actions in Step 1.

1. ● File & Serve AND update judge review status
   ○ Update judge review status only

8. In Step 2, choose your document type:

Reviewing Transactions:

✓ The outgoing document type is programmed to default to ORDER, and there are three choices for sending out your documents:

• SEND REVIEWED DOCUMENT: This is the "recycling" method, of using the document provided by the filer and placing the judge review banner on the document.

• SEND MY DOCUMENT: This is for when the judge wishes to send out his or her own document, not sending back the document that was initially routed to judge review.

• ATTACH MY DOCUMENT TO THE REVIEWED DOCUMENT: This allows the judge to "recycle" the document provided by the filer, and also attach an additional document to the outgoing document.

• Banners & Comments Pages can be applied to the judge's OWN document.

9. Under the Options area of Step 2, you have several choices available to you. Choose the appropriate action from the dropdown:

a. **Send reviewed document.** This method uses the document provided by the filer, placing the judge review banner on the document.

b. **Send my document.** This method uses the Judge's own document, not sending back the document that was initially routed to judge review. Banners & Comment Pages can be applied to the judge's OWN document.

c. **Attach my document to the reviewed document.** This method allows the Judge to attach an additional document to the outgoing document (originally submitted by the filer).

10. Enter any optional comments and select any additional comments from the Additional Comments Field by checking the boxes listed below the Comments text box:

Comments (optional)

Maximum length of text is 2000 characters

Include the following with your comments:

☐ File & ServeXpress reviewed Transaction ID   ☐ Case number
☐ Court   ☐ Case name
☐ Judge   ☐ Current date
☐ Alternate judge   ☐ Authorizing Judge signature
☐ Court Authorizer   ○ Graphic signature ○ /s/ Judge Qa H Judgea Jr

Position Comments Page:
◉ First page
○ Last page

11. Choose where you would like the comments page positioned. You can choose to place it on either the first or last page of the outgoing document.

12. Choose the location of the judge's signature banner. You can choose either the first page of the reviewed document, the last page of the reviewed document or on all pages of the reviewed document.

Apply Overlay to:
◉ First Page of the reviewed document
○ Last Page of the reviewed document
○ All Pages of the reviewed document
○ Do not apply Overlay to reviewed document

Preview Revised Document

File & Serve Xpress™

Reviewing Transactions:

✓ The Comments Field is optional.

✓ Comments entered into the Comments Section can be up to 2,000 characters in length.

✓ Among other choices, you can select "Court Authorizer and "Authorizing Judge Signature" from the Additional Comments Field.

✓ You can select as many additional comments from the Additional Comments Field as you wish.

13. In Step 3, you will choose the recipients who you would like the document sent to. Once you have made your selection, click the tab for Continue:

3. Send document to:

- ● All attorneys in case (will not be sent to pro se parties)
- ○ All attorneys and pro se parties in case
- ○ Service recipients, authorizer and sending party's attorney of reviewed transaction
- ○ Authorizer and the sending party's attorney of reviewed transaction
- ○ Select custom list of recipients
- ○ No one (file only)

14. Click Continue. At this point, your page will refresh and you will see a message asking you to wait while your document is being converted. Once the conversion has completed, your screen will again refresh and you will be brought to the final Review and Submit page.

Preferences | Sign Out
Judgea, Qa H | QA Court

HOME   FILING & SERVICE   ALERTS   SEARCH

Please wait while your document is converted to pdf format...

This page will automatically refresh until it is done.
When conversion is complete you will have to review and submit your transaction.

Reviewing Transactions:

✓ You have several choices when selecting recipients that the reviewed document can be sent to:

- All Attorneys in the case;

- All Attorneys and Pro Se parties in the case;

- Individuals/Firms that were served with the original document, the authorizer and the sending party's attorney;

- Authorizer and sending party's attorney;

- Select a customized list of recipients;

- No one (this means that the reviewed document will be 'file only' and will be added to the docket of the case but will not be served on anyone.

15. On this next page, the review page, you have a final opportunity to view both the PDF document and the original and to review the other information in your transaction before you submit it.

IMPORTANT: Your transaction has not yet been submitted. This is a PREVIEW of your transaction receipt. Please review your selections before submitting.

Transaction Report

Case number: 2017C1077 [View Case History]
Case name: Mock Collections Agency vs Tom Thomas
Court: QA Court
Division: 1 - Division 1
Judge: Judgea, Qa H

Document List (1)

PDF Format | Original Format

Document type: Order
Security: Public   Judge review status/action: Granted
Statutory fee: $0.00
Document title: Granted (Proposed Order re: Default Judgment)

16. Once you are satisfied with all of your details, click the Submit tab.

Cancel   Submit

17. 17. Once you have clicked Submit, you will see the Judge Review Receipt and the message You have completed Judge Review successfully.

You have completed Judge Review successfully.
Print Receipt   Transaction Report   Original Transaction   Clerk Revie

Case number: 2017C1077 [View Case History]
Case name: Mock Collections Agency vs Tom Thomas
Court: QA Court
Division: 1 - Division 1
Judge: Judgea, Qa H

Reviewing Transactions:

✓ To print your receipt, click on the Print Receipt link at the top, right hand side of the transaction receipt screen.

✓ To go back to your Items for Judge Review inbox, click the Items for Judge Review hyperlink at the top, left hand side of the page.

✓ At the top right of the receipt, you have the option to print your receipt, go to the original transaction or onto the previous or next transaction.

Removing Transactions

If there are Transactions in the Items for Judge Review Inbox that a Judge no longer has the need to move upon, the Judge may remove them from the Judge Review Queue with a few simple steps:

▶ **MailBox**

Items for Clerk Review

Batches for Clerk Review

Items for Judge Review

Inbox

Sent Items
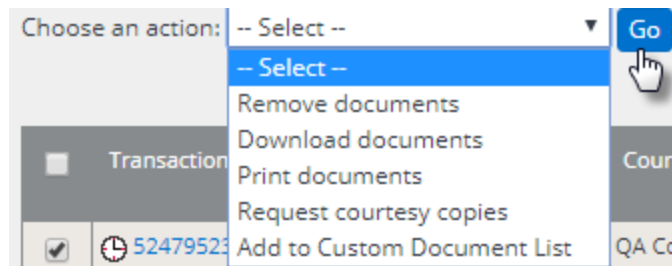
Rejected Items

Saved Transactions

1. Click on the Items for Judge Review link in the Mailbox.
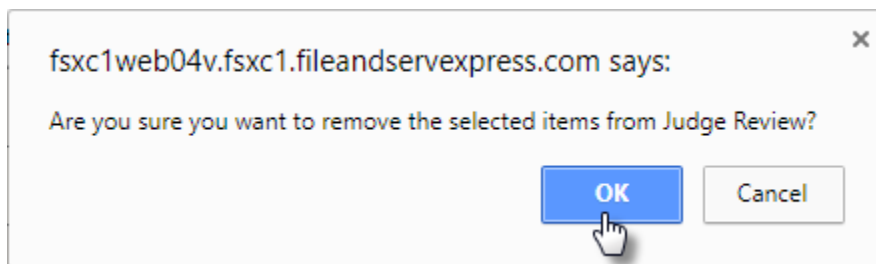2. Place a checkmark in the checkbox next to the transaction(s) that you wish to remove from the queue.

	Transaction	▲ Date/Time	Court	Case Number Case Name	Authorizer Organization		Document Type	Document Title	Review Status	Size
☑	🕓 52479523	10/26/2017 10:06 AM PDT	QA Court	2017QA1074 test1	QA T Watson, QA Firm A	☑	Answer to Counterclaim	3 [view]	Pending	0.1MB
☐	🕓 52479774	11/9/2017 9:09 AM PST	QA Court	2017QA1076 test1 11/09/2017	QA T Watson, QA Firm A	☐	Answer to Counterclaim	3 [view]	Pending	0.4MB
☑	52479892	11/14/2017 9:52 AM PST	QA Court	2017C1077 Mock Collections Agency vs Tom Thomas	Adam Attorney, Mock Firm A-Bellevue	☑	Complaint	Complaint [view]	Pending	0.1MB
☐	52479912	11/14/2017 11:00 AM PST	QA Court	2017C1077 Mock Collections Agency vs Tom Thomas	Lucy Lawyer, Mock Firm B	☐	Answer	Answer [view]	Pending	0.1MB

1-4 of 4 transactions   <<Prev Page 1 of 1 Next>>

3. Select Remove Documents from the Choose an action dropdown list at the top of the Items for Judge Review list.

4. Click the Go button.
5. Click OK in the Pop-up box asking Are you sure you want to remove the selected items from Judge Review?

6. The **Items for Judge Review** screen will refresh and the selected items will no longer be listed in the Judge Review queue.

Reviewing Transactions:

✓ If you wish to remove documents from the Items for Judge Review Inbox without removing the entire transaction, you can:

- Instead of placing your checkmark in the checkbox next to the Transaction ID, place the checkmark in the checkbox next to the document(s) you wish to remove.

Delay Transactions

If you wish to delay moving upon the document, you have the option to delay Judge Review until a date of your choosing. Take the following steps to move an item from the Items for Judge Review to the Delay Judge Review Queue:

1. Click on the Items for Judge Review link in the Current Activity section of the Home tab.

2. Click on the Transaction ID of the Item you wish to delay.

	Transaction	▲Date/Time	Court	Case Number Case Name	Authorizer Organization		Document Type	Document Title	Review Status	Size
☐	🕐 52479523	10/26/2017 10:06 AM PDT	QA Court	2017QA1074 test1	QA T Watson, QA Firm A	☐	Answer to Counterclaim	3 [view]	Pending	0.1MB
☐	🕐 52479774	11/9/2017 9:09 AM PST	QA Court	2017QA1076 test1 11/09/2017	QA T Watson, QA Firm A	☐	Answer to Counterclaim	3 [view]	Pending	0.4MB
☐	52479892	11/14/2017 9:52 AM PST	QA Court	2017C1077 Mock Collections Agency vs Tom Thomas	Adam Attorney, Mock Firm A-Bellevue	☐	Complaint	Complaint [view]	Pending	0.1MB
☐	52479912	11/14/2017 11:00 AM PST	QA Court	2017C1077 Mock Collections Agency vs Tom Thomas	Lucy Lawyer, Mock Firm B	☐	Answer	Answer [view]	Pending	0.1MB

1-4 of 4 transactions <<Prev Page 1 of 1 Next>>

Delay Judge Review:

✓ The Delay Judge Review Queue contains any documents you wish to delay moving upon but do not want sitting in your Items for Judge Review Inbox.

✓ To view your Delay Judge Review Queue, click on the Delayed Judge Review Items link at the top, right side of the Items for Judge Review Inbox.

3. Type the date you wish to delay Judge Review until in the "**Delay this transaction until box**" and click Continue.

Authorizer: Judgea, Qa H ▼

○ View document(s) for judge review   ● View all document(s) as a list   ○ View document(s) inline

Document List (2)   Total Statutory Fees: $28.00

Main Document, 1 page   ID: 67222803
Document History | PDF Format | Original Format

Document type: Answer   Judge review status/action: Pending ▼

Security: Public   or delay this transaction until: 11/15/2017   (mm/dd/yyyy)

Statutory fee: $28.00

Document title: Answer

Continue >>

4. The Screen will refresh to the next Transaction ID in your **Items for Judge Review Inbox.**

5. To view your Delay Judge Review Queue, click on the Delayed Judge Review Items link at the top, right side of the Items for Judge Review Inbox.

⊞ Filter List   Sent during last 120 days ▼

⊟ **Judgea, Qa H**   Show: Delayed Judge Review items