



File & Serve *Xpress*<sup>™</sup>

# Case & Party Management

User Guide

## Case & Party Management

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## 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.

# File & ServeXpress Resources

# Case & Party Management Overview

Use **Case & Party Management** to update the status of parties and attorneys in cases. Not all courts permit online Case & Party Management requests, and in some jurisdictions, special rules apply. For more information, check the Rules & Procedures for your particular court (available through the Resource Center) or contact Customer Support.

Locate the Case & Party Management page by clicking on the Case & Party Management link in the Track & Manage area of the File & ServeXpress Home Page.

File & ServeXpress™

Preferences | Sign Out  
Attorney, Adam | Mock Firm A-Bellevue  
File & ServeXpress Notices

HOME | FILING & SERVICE | ALERTS | SEARCH

The screenshot shows the File & ServeXpress Home Page. The top navigation bar includes 'HOME', 'FILING & SERVICE', 'ALERTS', and 'SEARCH'. Below the navigation bar, there are three main sections: 'MailBox', 'Quick Start', and 'Track & Manage'. The 'Track & Manage' section is highlighted with a red circle around the 'Case & Party Management' link, and a red arrow points to it. The 'Track & Manage' section also includes a 'Transaction ID' search box with a 'GO' button, and a list of links: Alerts, Tracked Items, Edit Tracked Items, Calendar, Message Boards, My Attorneys, Case View, Document Upload, Case & Party Management, Billing Information, and Custom Document Lists.

## Case & Party Management Tips:

- ✓ **Note:** Change requests take up to 24 hours. If you have a filing due today and you need an immediate data change, complete your request online then contact Customer Support with the change request ID and request that the change be completed ASAP.

# Case & Party Management Features

**Add Party** - Allows you to add party information to a case where a party was not named in the original complaint. Also allows you to enter party information for those who were inadvertently left off the service list.

**Modify Party** - Allows you to remove your party from a case after being dismissed and also to withdraw your firm from representation of a case party.

**Add Attorney** - Allows you to add a new attorney to a case.

**Substitute Attorney** - Allows you to transfer representation of a party to another attorney or to correct the service list if the wrong attorney is listed.

## Case & Party Management Includes:

Add Party

Modify Party

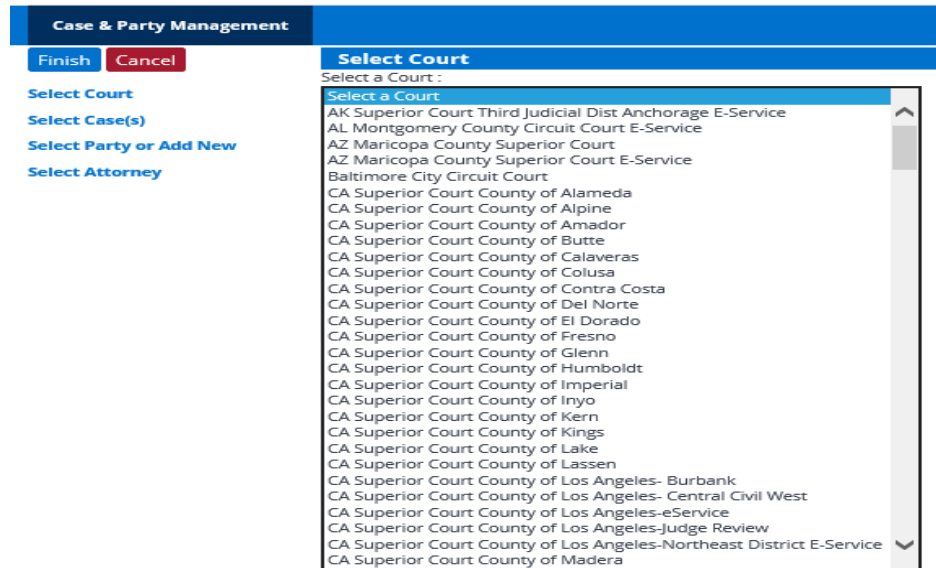
Add Attorney

Substitute Attorney

Case Groups

# Add Party

1. From the main Case & Party Management Page, click the blue button for **Add Party**. The *Select Court* page appears.
2. From the drop down menu, select the court presiding over the case in which you wish to make changes. The *Select a Case* page appears.



The screenshot shows the 'Case & Party Management' interface. On the left, there are buttons for 'Finish' and 'Cancel', and a list of actions: 'Select Court', 'Select Case(s)', 'Select Party or Add New', and 'Select Attorney'. The 'Select Court' action is highlighted. On the right, a 'Select Court' dropdown menu is open, displaying a list of courts. The first item is 'AK Superior Court Third Judicial Dist Anchorage E-Service'. Other courts listed include 'AL Montgomery County Circuit Court E-Service', 'AZ Maricopa County Superior Court', 'AZ Maricopa County Superior Court E-Service', 'Baltimore City Circuit Court', and various 'CA Superior Court County of...' entries for counties like Alameda, Alpine, Amador, Butte, Calaveras, Colusa, Contra Costa, Del Norte, El Dorado, Fresno, Glenn, Humboldt, Imperial, Inyo, Kern, Kings, Lake, Lassen, Los Angeles- Burbank, Los Angeles- Central Civil West, Los Angeles-eService, Los Angeles-Judge Review, Los Angeles-Northeast District E-Service, and Madera.

## Add Party Tips:

- ✓ From the main Case & Party Management Page, select the button for Add Party:



Enter a portion of the name or number of the case(s) in which you wish to make changes and click **Find**.

**Case & Party Management**

Finish Cancel **Select a Case**

Select Court  
Court : Colorado Mock District Court

Select Case(s)

Select Party or Add New

Select Attorney

Court Name : Colorado Mock District Court

Case Name : Johnson x i

Case Number : i

Find Select Cases

- Place a check in the box by the Case Number in the *Court Case List* and click **Select Cases**. The *Select Party* page appears.

**Case & Party Management**

Finish Cancel **Select a Case**

Select Court  
Court : CA Superior Court County of San Francisco-Civil

Select Case(s)

Select Party or Add New

Select Attorney

Court Name : CA Superior Court County of San Francisco-Civil

Case Name : miller i

Case Number : i

Find Select Cases

1. Select a court name; then enter all or part of the case name or number.  
2. If you have not found the case you're looking for, enter other text and click Find again.

**Court Case List** 1 through 51 of 61 More >>

Case Number	Case Name	Case Type	Case Class	Court
<input checked="" type="checkbox"/> 21411	Miller vs Allison Deffenbacher (Bryan)	Personal Injury-Asbestos	Civil	CA Superior Court County of San Francisco-Civil

- Select an entity type from the drop down menu, enter in party information and click **Find** (required fields are marked with an asterisk).

**Case & Party Management**

Finish Cancel **Select Party**

Select an entity type and input the name of your party to do a quick search. If the party is not found you will be able to add them.

Select Court  
Court : CA Superior Court County of San Francisco-Civil

Select Case(s)  
Case(s): Miller vs Allison Deffenbacher (Bryan)

Select Party or Add New

Select Attorney

Entity Type : Individual  
Organization

\* Party Name :

Find

### Select Party

Select an entity type and input the name of your party to do a quick search. If the party is not found you v


Entity Type: Individual ▼

Party First Name: John

Party Middle Name:

\* Party Last Name: Doe | x


Party Suffix:

 Find

5. Choose a party type from the drop down menu in the resulting screen, and then click the name of your party.

Select a Party Type then click the Party Name to select the party.  
A selected alias party name will reflect the alias to party name when completed.

Party Type: Select a Party Type ▼ 

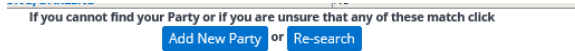


Party Name	Is an alias
<a href="#">Doe, John 2</a>	No
<a href="#">Doe, John AJ</a>	No
<a href="#">Doe, John Bernard</a>	No
<a href="#">Doe, John BS</a>	No
<a href="#">Doe, John BM</a>	No
<a href="#">Doe, John BF</a>	No
<a href="#">Doe, John BL</a>	No
<a href="#">Doe, John DF</a>	No

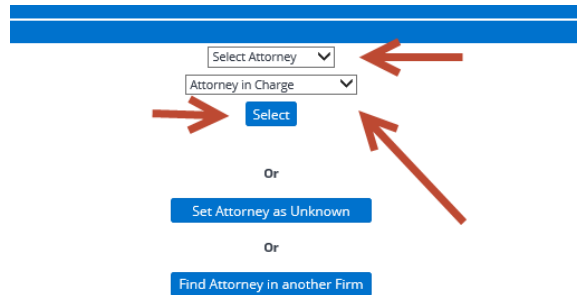
- ✓ **Party's Name Does Not Appear:** When searching for your party, if your party's name does not appear in the list, click **Re-search** to modify and re-run your search.



6. Click "Add New Party" if you cannot find your party, or "Re-Search".



7. Next, select the Attorney and their role, e.g., "Attorney in Charge." This will vary by jurisdiction.



8. To complete, select "Add to Case."



**Note:** In order to facilitate the requested changes, File & Serve must verify the change with any special jurisdictional rules, the Court and Court Record.

**Supporting Documentation:** Types of supporting documentation may include a copy of the complaint, copy of an appearance filed or a letter from your office authorizing your request.

# Modify Party

To modify case party information:

1. From the main Case & Party Management Page, click the blue button for **Modify Party**. The *Modify Case Participants* page appears.
2. From the drop down menu select the court presiding over the case in which you would like to make changes.

- ✓ From the main Case & Party Management Page, select the button for Modify Party:

Case & Party Management

Modify Case Participants

Select a Court

US Mock Court

Count Name: US Mock Court

Case Name:

Case Number:

Case Class:

Case Type:

Attorney First Name:

Attorney Middle Name:

Attorney Last Name:

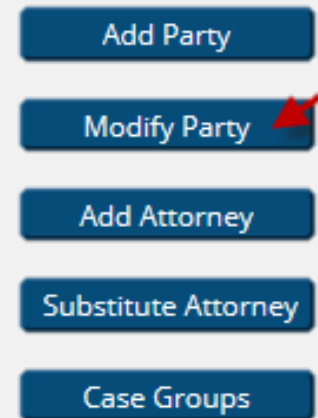
Party First Name:

Party Middle Name:

Party Last Name/Organization Name:

Find

1. Input case name, case number, case class, case type, attorney name, attorney type, party name, party type or participant status. All values are optional, but you must supply information in at least one level box.
2. If you have not found the case you're looking for, enter other text and click 'Find' again.
3. The search assumes begins with for all data entered in the text boxes.



3. Enter search criteria in at least one of the fields on the page and click Find. The Case Participants Search Results screen appears.

- Place a check box next to the applicable entry (ies) and select the appropriate radio button next to Party Dismissed or No Longer Represent This Party. Click Update.

**Case & Party Management**

On all selected Case Participants change:

Party Status to  Party Dismissed  No Longer Represent This Party

**1. Select the Party** **3. Click "Update"** **2. Indicate "Party Dismissed" or "No Longer Represent This Party"**

Update Back to Search

- Check Case Participants to modify, and select any of the party status items. Then click Update
- To substitute the attorney corresponding to the case participant click the **Attorney's Name**.

Case Participants search results Select Participants to modify, 1 through 12

	Party Name	Party Type	Participant Status	Attorney Name	Attorney Type	Firm Name	Case Name	Case Number
<input checked="" type="checkbox"/>	Jackson, Jonathan	Defendant	Active	<a href="#">Adam Attorney</a>	Privately Retained Attorney	Mock Firm A-Bellevue	Sandra Miller vs. Colorado Climbing Center	2008CV1152008
<input type="checkbox"/>	Jackson, Jonathan	Defendant	Active	<a href="#">Lucy Lawyer</a>	Privately Retained Attorney	Mock Firm B	Sandra Miller vs. Colorado Climbing Center	2008CV1152008
<input type="checkbox"/>	Law, Rick	Defendant	Active	<a href="#">Pro Se</a>	N/A	Pro Se-	Miller vs Law	
<input type="checkbox"/>	Law, Ruxy	Defendant	Active	<a href="#">Pro Se</a>	N/A	Pro Se-	Miller vs Law	
<input type="checkbox"/>	Miller, J Hunter	Applicant	Active	<a href="#">Adam Attorney</a>	Privately Retained Attorney	Mock Firm A-Bellevue	In the Matter of: Miller, J Hunter and Susan	
<input type="checkbox"/>	Miller, Susan	Applicant	Active	<a href="#">Andrew Associate</a>	Privately Retained Attorney	Mock Firm A-Bellevue	In the Matter of: Miller, Hunter and Susan	
<input type="checkbox"/>	Miller, Gean	Respondent	Active	<a href="#">Adam Attorney</a>	Privately Retained Attorney	Mock Firm A-Bellevue	R Miller vs G Miller	2007dr121907
<input type="checkbox"/>	Miller, Ray	Petitioner	Active	<a href="#">Lucy Lawyer</a>	Privately Retained Attorney	Mock Firm B	R Miller vs G Miller	2007dr121907
<input type="checkbox"/>	Miller, Sandra	Plaintiff	Active	<a href="#">Adam Attorney</a>	Privately Retained Attorney	Mock Firm A-Bellevue	Sandra Miller vs. Colorado Climbing Center	2008CV1152008
<input type="checkbox"/>	Miller, Jackson	Respondent	Active	<a href="#">Pro Se</a>	N/A	Pro Se-	Shauna Miller vs. Jackson Miller	2007DR100
<input type="checkbox"/>	Miller, Shauna	Petitioner	Active	<a href="#">Adam Attorney</a>	Privately Retained Attorney	Mock Firm A-Bellevue	Shauna Miller vs. Jackson Miller	2007DR100
<input type="checkbox"/>	Miller Construction	Plaintiff	Active	<a href="#">Lucy Lawyer</a>	Privately Retained Attorney	Mock Firm B	Miller vs Law	

Case Participants search results Select Participants to modify, 1 through 12

- The Signature Documentation page appears. Enter the Document Title and the Transaction ID of the electronically filed document verifying your change request, or attach an electronic copy of the supporting documentation.

To verify that the Petition/Motion has been filed and signed by the judge, you must either enter the File & ServeXpress Transaction ID and Document Title of the filed document or attach an electronic copy of the signed filed document below.

**Transaction ID**   
**Document Title**

**Attached Documentation**  
**Document Path**

- ✓ **Supporting Documentation:**  
Types of supporting documentation may include a copy of the dismissal, a copy of an executed Request to Remove Party/Law Firm from Service List form (in San Francisco) or a letter from your office authorizing your request

# Add Attorney

To add new attorney information:

1. From the main Case & Party Management Page, click the blue button for **Add Attorney**. The Add Attorney page appears.
2. From the drop down menu select the court presiding over the case in which you would like to make changes.

The screenshot shows the 'Case & Party Management' header with a 'Finish' button and a 'Cancel' button. Below the header, there are four menu items: 'Select Court', 'Select Case(s)', 'Select Party or Add New', and 'Select Attorney'. The 'Select Court' menu is expanded, showing a list of courts to choose from.

3. Enter a portion of the name or number of the case(s) in which you wish to make changes and click **Find**.

## Add Attorney Tips:

- ✓ From the main Case & Party Management Page, select the button for Add Attorney:



- Place a check in the box by the Case Number in the Court Case List and click **Select Cases**.

**Case & Party Management**

Finish Cancel **Select a Case**

Select Court  
Court:  
CO Mock County District  
Court

Court Name: CO Mock County District Court  
Case Name: miller  
Case Number:

Find Select Cases

- The Select Party Page appears. Click the party's name. If the party you are looking for does not appear in the list, select the entity type from the drop down menu, enter the party name and click **Find**.

Case & Party Management

Finish Cancel Select Party

Select Court  
Court:  
CO 13th County District  
Court

Select Case(s)  
Case(s):  
Melissa Miller vs. Pine Tree HOA

Select Party or Add New

Select Attorney

Select a party name to represent for the case(s) selected. If the party is unavailable in the list(s) below do a search.

Case Name: Melissa Miller vs. Pine Tree HOA Case Number: 2009CV12209

Party Name	Party Type
Harris, Helen	Defendant
Miller, Melissa	Plaintiff
Pinetree HOA	Defendant

Select an entity type and input the name of your party to do a quick search. If the party is not found you will be able to add them.

Entity Type: Organization

\* Party Name:

Find

If your party doesn't appear, click on the "Entity Type" drop-down menu. Enter the Party Name and click "Find".

- To select counsel from your firm, choose the attorney and attorney type from the drop down menus and click **Select**.

✓ **Attorney Unknown:**

If the attorney is unknown click **Set Attorney as Unknown**, and then click in the resulting

**Add To Case(s)**

screen.

7. Click **Add To Case(s)** in the resulting screen. The *Signature Documentation* page appears.

Signature Documentation

To verify that the Petition/Motion has been filed and signed by the judge, you must either enter the File & ServeXpress Transaction ID and Document Title of the filed document or attach an electronic copy of the signed filed document below.

Transaction ID   
 Document Title   
 Attached Documentation  
 Document Path

8. Enter the Document Title and the Transaction ID of the electronically-filed document verifying your change, or attach an electronic copy of the supporting documentation.
9. Click the Submit button.

**Note:** In order to facilitate the requested changes, File & Serve must verify the change with any special jurisdictional rules, the Court and Court Record.

- ✓ **Attorney in Another Firm:** If the attorney is in another firm, click **Find Attorney in Another Firm** to search our database. Enter search criteria in at least one of the fields on the upper part of the page, and click **Find**. The Attorney Name Search Results list appears. If the attorney name does not appear in the list, click **Re-search** to modify and re-run your search. To select an attorney choose the attorney type from the drop down menu and click on the attorney's name. Next, click

**Add To Case(s)**

in the resulting screen.



# Substitute Attorney

- From the main Case & Party Management Page, click the blue button for Add Attorney. Click Substitute Attorney. The Select Court page appears.

The screenshot shows a blue header bar with 'Case & Party Management' on the left and 'Substitute Attorney' on the right. Below the header, there is a label 'Select a Court :' followed by a dropdown menu with the text 'Select a Court' and a downward arrow.

- Select the court presiding over the case(s) in which you would like to make changes from the drop down menu in the resulting screen. The Substitute Attorney From page appears. Enter in a portion of the attorney name and/or firm name for the attorney you wish to substitute from in the fields provided then click Find.

The screenshot shows the 'Substitute Attorney' page. On the left, there is a blue header with 'Substitute Attorney' and a sub-header 'Court: Colorado Mock District Court'. On the right, there is a section titled 'Attorney to substitute from:' with two input fields for 'Last Name' (containing 'Attorney') and 'First Name' (containing 'Adam'). Below these is a 'Firm Name:' input field and two buttons: 'Find' (blue) and 'Cancel' (red).

## Substitute Attorney Tips:

- ✓ From the main Case & Party Management Page, select the button for Substitute Attorney:



3. A list of matching attorneys will appear. Click the desired attorney's name.
4. The Substitute Attorney To page appears. Enter in a portion of the attorney name and/or firm name for the attorney you wish to substitute to in the fields provided then click Find.

**Substitute Attorney**

<p><b>Court:</b> Colorado Mock District Court</p> <p><b>From:</b> Attorney, Adam</p> <p><b>Firm:</b> Mock Firm A-Bellevue</p>	<p><b>Attorney to substitute to:</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 2px 5px;"><b>Attorney Name:</b></td> <td style="width: 25%; padding: 2px 5px; text-align: center;"><small>Last Name</small></td> <td style="width: 25%; padding: 2px 5px; text-align: center;"><small>First Name</small></td> </tr> <tr> <td style="padding: 2px 5px;"><input style="width: 90%;" type="text" value="Lawyer"/></td> <td style="padding: 2px 5px;"><input style="width: 90%;" type="text" value="Lucy"/></td> <td style="padding: 2px 5px;"></td> </tr> <tr> <td style="padding: 2px 5px;"><b>Firm Name:</b></td> <td colspan="2" style="padding: 2px 5px;"><input style="width: 90%;" type="text" value="Mock Firm A"/></td> </tr> <tr> <td style="padding: 2px 5px;"></td> <td style="padding: 2px 5px; text-align: center;"><input type="button" value="Find"/></td> <td style="padding: 2px 5px; text-align: center;"><input type="button" value="Cancel"/></td> </tr> </table>	<b>Attorney Name:</b>	<small>Last Name</small>	<small>First Name</small>	<input style="width: 90%;" type="text" value="Lawyer"/>	<input style="width: 90%;" type="text" value="Lucy"/>		<b>Firm Name:</b>	<input style="width: 90%;" type="text" value="Mock Firm A"/>			<input type="button" value="Find"/>	<input type="button" value="Cancel"/>
<b>Attorney Name:</b>	<small>Last Name</small>	<small>First Name</small>											
<input style="width: 90%;" type="text" value="Lawyer"/>	<input style="width: 90%;" type="text" value="Lucy"/>												
<b>Firm Name:</b>	<input style="width: 90%;" type="text" value="Mock Firm A"/>												
	<input type="button" value="Find"/>	<input type="button" value="Cancel"/>											

5. A list of matching attorneys will appear. Click the desired attorney's name.
6. The *Case Search* page appears. Search for your case by entering a portion of the case name or case party in the fields provided. Click **Find**.

**Case & Party Management**

**Substitute Attorney**

**Court:** Colorado Mock District Court

**From:** Attorney, Adam

**Firm:** Mock Firm A-Bellevue

**To:** Lawyer, Lucy

**Firm:** Mock Firm B

To narrow your Case search enter a Case Number or Party name

Case Number:

First Name:

Middle Name:

Organization/Last Name:

**Find** Cases the From Attorney is participating in.

New Attorney Type:  **Select Cases** **Cancel**

7. From the list of available cases that appears after you click Find, place a check in the box (es) by the Case Number(s).
8. Select the New Attorney Type from the drop down menu and click Select Cases.

**Case & Party Management**

**Substitute Attorney**

**Court:** Colorado Mock District Court

**From:** Attorney, Adam

**Firm:** Mock Firm A-Bellevue

**To:** Lawyer, Lucy

**Firm:** Mock Firm B

**Attorney Type:** Privately Retained Attorney

Click submit to send the charges for approval. Back will start the substitute attorney process over.

**Submit** **Back**

Case Name	Case Number	Party Name
1   In the Matter of: Miller, Hunter and Susan		Miller, Hunter

9. Verify your changes in the resulting screen and click Submit. The Signature Documentation page appears.
10. Enter the Document Title and the Transaction ID of the electronically-filed document verifying your change, or attach an electronic copy of the supporting documentation.
11. Click the Submit button.

- ✓ **Note:** In order to facilitate the requested changes, File & Serve must verify the change with any special jurisdictional rules, the Court and Court Record.