



File & Serve *Xpress*[™]

USER GUIDE

Using Additional Recipients to Share Documents with Non-Parties

Additional Recipients Tab

The File & ServeXpress Additional Recipients tab allows filers to send transactions to recipients who are not on the service list of the case. Newly added recipients will receive emails with instructions as to how to retrieve the documents. They will be provided with a login/password for the sole purpose of retrieving those documents. Once a non-party is added on the Additional Recipients tab, they are saved to the data base and can be searched for and easily added on subsequent transactions.

The screenshot shows the 'Add'l Recipients' tab in the File & ServeXpress interface. The top navigation bar includes 'HOME', 'FILING & SERVICE', 'ALERTS', and 'SEARCH'. Below this, there are tabs for 'Start A Transaction', 'Saved Transactions', and 'Scheduled Transactions'. The main content area has a sub-navigation bar with '12/13/17 10:37 AM EST', 'Documents', 'Sending Parties', 'Service', 'Add'l Recipients' (highlighted with a red box), and 'Review & Submit'. Below the sub-navigation bar, there is a header for 'Select Additional Recipients' with 'Transaction ID: 61459785' and 'Cancel Save & Close' buttons. The main content area contains instructions: 'Enter a few characters in Last Name, Email, or Organization, and click Find to search for available recipients. If your search is unsuccessful, you may change your criteria and try again, or choose to Create Additional Recipient'. There are four input fields: 'First Name', 'Last Name', 'Email', and 'Organization'. Below these fields are three buttons: 'Find', 'Clear', and '?'. At the bottom, there is a message box that says 'No available selections'.

Additional Recipients Tab *(continued)*

To add an additional recipient:

1. The system requires a user to initially “search” for an additional recipient before being given the option to create a new additional recipient.



A search form with the following fields and buttons:

- First Name:
- Last Name:
- Email:
- Organization:
- Buttons: Find (blue), Clear (red), ? (blue)

2. Search results will display both File & ServeXpress subscribers and non-member users.

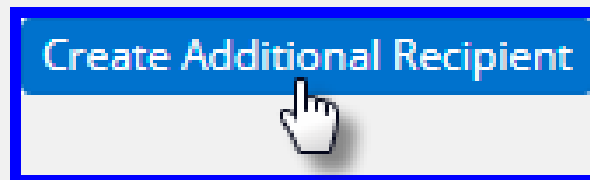
Select each person you want to add as an additional recipient and, for each, indicate the delivery method (online or fax). To remove a person, deselect them.

1 through 13 of 13 [Add to Recipient List](#) [Create Additional Recipient](#) Show results per page

Select	Send	First Name	Last Name	Organization	Email	Fax	City	State	User Type
<input type="checkbox"/>	<input checked="" type="radio"/> Online	Bob	Hope	Hope, Bob	bobhope@somewhere.com	none valid			Non-Subscribing User
<input type="checkbox"/>	<input checked="" type="radio"/> Online	Bob	Hope	Hope, Bob	bob@overhere.com	none valid			Non-Subscribing User
<input type="checkbox"/>	<input checked="" type="radio"/> Online	Bob	Hope	Hope, Bob	bobby.hope@fakelawfirm.com	none valid			Non-Subscribing User

Additional Recipients Tab *(continued)*

3. If no results or inaccurate results appear for the search, then the user will see a button to “Create Additional Recipient”.



4. When creating a new Additional Recipient, the user will now enter both a First and Last Name and will then select either “Online” or “Fax” as the delivery method.

Create Additional Recipient

Enter the information for the person you wish to add to the Additional Recipient List. When you finish, click **Add to Recipient List**.

First Name: Last Name:

Online
 Fax

*Email address

Additional Recipients Tab *(continued)*

5. After entering a new Additional Recipient, the system will then create a non-member “account” for the additional recipient.
6. That non-member account will now appear in the search results when filers search for the name and will display the notification method previously entered for the additional recipient non-member.