



File & Serve *Xpress*[™]

Public Access Terminal (PAT) How to File a Transaction

User Guide

(PAT) How to File a Transaction

TABLE OF CONTENTS

Submitting Transactions through a Public Access Terminal (PAT) Overview	3
Logging on to the Public Access Terminal	3
Initiating a Case through the Public Access Terminal	4
Submitting Transactions in Existing Cases through the Public Access Terminal	11

Submitting Transactions through a Public Access Terminal (PAT) Overview

File & ServeXpress provides Public Access Terminals (PATs) at Courthouses in many jurisdictions where Courts utilize File & ServeXpress for eFiling Purposes. Clients can use PATs to file transactions to the Court and can also view, print or download documents from cases as well. Use of the PATs are free of charge.

Logging on to the Public Access Terminal

1. To submit a transaction to the court or search the File & ServeXpress database by utilizing the public access terminal (PAT) at the Clerk's office, the non-subscriber must first obtain a one-time User ID and Password from the clerk.
2. At the PAT Welcome screen, the user will hover over Submit Filings and make their filing selection:



3. This action will bring up the Filing Sign On screen. The user will enter the PAT User ID and password provided by the clerk and click Sign On:

The image shows a sign-on form with a light gray background. At the top, it says 'Please enter the Public Access account.' Below this are two white input fields: 'User Name' and 'Password'. At the bottom, there is a blue button with the text 'Sign On'.

Public Access Terminal Tips:

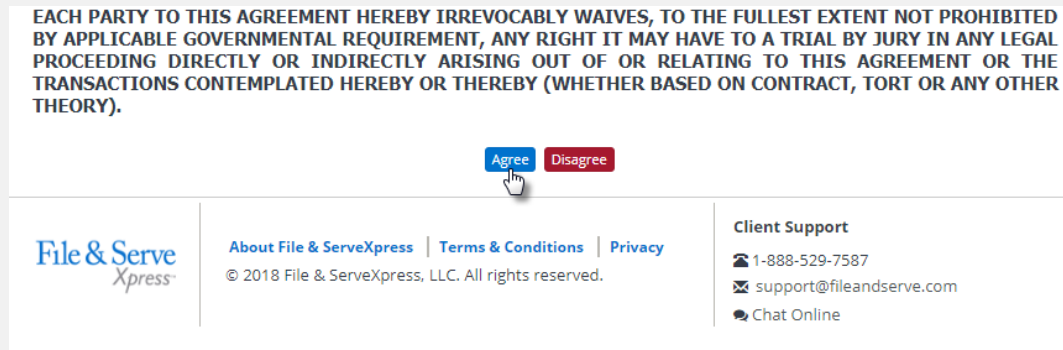
- ✓ From any of the screens in File & ServeXpress, you may click on the File & ServeXpress Support link in the upper right hand corner of the screen. This link provides access to access support links to File & ServeXpress Customer Support, File & ServeXpress Rules, and Support Statistics.
- ✓ File & ServeXpress Customer Support's phone number is 1-888-529-7587.
- ✓ File & ServeXpress Customer Support is available 24 hours per day.
- ✓ If you are a member of a law firm you will need to choose the attorney at your firm who is authorizing the transaction. You would just need to choose his or her name from the 'Authorized By' dropdown.

Initiating a Case through the Public Access Terminal

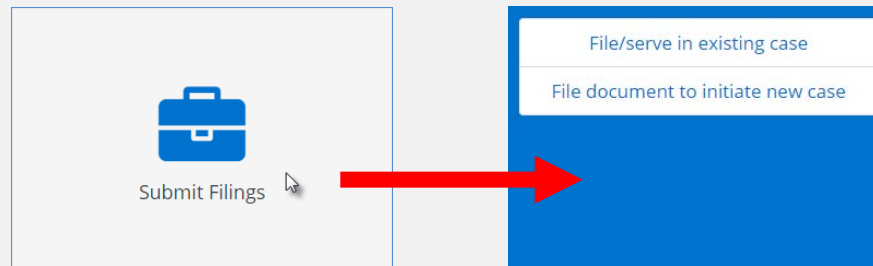
4. The Public Access Terminal Agreement will appear.



5. The PAT user must 'Agree' terms of the agreement to proceed with the transaction in the File & ServeXpress application.

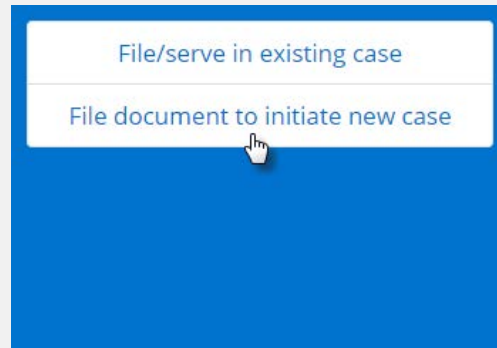


After sign on, the user will return to the home screen and will have the choice of filing in an existing case or filing a document to initiate a new case.



Initiating a Case through the Public Access Terminal

1. Click on the link File document to initiate new case if your case does not already exist at the court.



2. To initiate a new case, at the Case Information Screen select a Court and click **Continue**.

Next, select your court from the list below:

- Click the radio button next to the court name
- Click **Continue*** below the list of courts

1 through 1 of 1

Court Name
<input checked="" type="radio"/> Mock Court-Filing & Serving

[Continue >>](#)

3. Once within the selected court, select a Case Class and click **Continue**.

The first step in adding a case is to select a case class for your case.

- Select the radio button next to the case class and click the **Continue*** button.

Case Class
<input checked="" type="radio"/> Civil

[Continue >>](#)

Initiating a Case through the Public Access Terminal

4. Enter the requested case information: Division (if dropdown is provided), Case Type and Case Name and click Continue. The Cases Name should be entered according to local Court Rule or State Supreme Court Guidelines.

Next, enter the case information:

- Select the case type for your case.
- Enter the case name in the Case Name box.
- When you have finished, click the **Continue*** button.

Case Type: Personal Injury

Case Name: Tom Thompson vs John Johnson
(e.g. Name of Plaintiff vs Name of Defendant)

Continue >>

5. Choose to file as a Pro Se (not represented by an attorney) or as a non-subscriber law firm.

Next select not represented by a law firm or add your law firm:

- Click on the radio button next to the desired selection
- Click on **Continue***

I am a party in the case and not represented by a law firm.

I am a member of a law firm.

Continue >>

6. Click **Continue**.

Initiating a Case through the Public Access Terminal

- At the Document Level you can attach your documents to the transaction. The steps for attaching a document are as follows:
 - » Choose a document type from the Document Type dropdown.
 - » Locate the document on your drive by clicking the *Choose File* button under the Add a document to your Transaction line.
 - » Enter the title of your document in the Document Title field.
 - » Choose the document "Access Level" (if selections are provided by the court) by choosing the appropriate radio button.

Next, add your documents:

- Select the document type (e.g. Motion for Summary Judgment).
- Click **Browse** to locate and select the document on your computer.
- Enter a document title that describes the document you are filing .
- Designate whether the document should be publicly accessible.
- Click **Add Document** to upload the document to the system.

This document will be the originating event for the new Case

Document Type:

Add a document to your Transaction:

Generic Sam...plaint.docx

Supported files are: .pdf, .txt, .doc, .docx, .rtf, .wpd, .tif, .tiff, .bmp, .jpg, .jpeg, .gif.

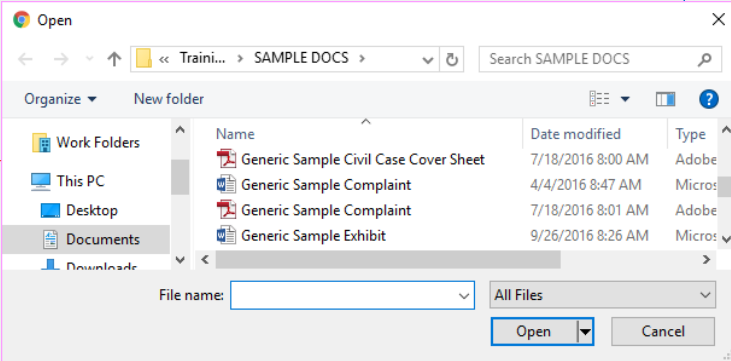
Document Title:
(e.g. Plaintiff's Personal Injury Complaint)

Request the court to handle this document as 'public', making it accessible to anyone viewing the case record.

Request the court to handle this document as 'sealed', making it accessible to the court, and organizations served or notified of service with the document.

Request the court to handle this document as 'in camera', making it accessible solely to the case judge.

This will be a main document.



Initiating a Case through the Public Access Terminal

8. Add any other documents you may wish to upload at this time by following the directions above. Indicate which document is the main document and which document(s) are the supporting documents.

9. Click **Continue**.

Next, click **Continue** to select your case party or to add another document:

- Select the document type (e.g. Motion for Summary Judgment).
- Click **Browse** to locate and select the document on your computer.
- Enter a document title that describes the document you are filing .
- Designate whether the document should be publicly accessible.
- Click **Add Document** to upload the document to the system.

Document Type: Case Information Cover Sheet ▼

Add a document to your Transaction:

Choose File No file chosen

Supported files are: .pdf, .txt, .doc, .docx, .rtf, .wpd, .tif, .tiff, .bmp, .jpg, .jpeg, .gif.

Document Title:

(e.g. Plaintiff's Personal Injury Complaint)

Case Information Cover Sheet

- Request the court to handle this document as 'public', making it accessible to anyone viewing the case record.
- Request the court to handle this document as 'sealed', making it accessible to the court, and organizations served or notified of service with the document.
- Request the court to handle this document as 'in camera', making it accessible solely to the case judge.

This will be Supporting: Set as Main Document ▼
Set as Main Document
Complaint

Add Document Continue >>

Initiating a Case through the Public Access Terminal

10. After all documents are attached you can now enter the party information. To add parties take the follow steps:

- » Select initiating or additional party
- » Choose the type of entity (individual or organization)
- » Choose the party type.
- » Enter first, middle and last name.
- » Click Add Party.

Next, enter the parties involved in the case.
(This information will help in delivering your transaction to the court on behalf of the appropriate party and delivering service to the appropriate attorneys or parties.)

- Select the entity type (i.e. Individual or Organization)
- Select the party type, the party's role in the case (i.e. plaintiff, defendant, other)
- Enter the party's name
- Link the party to its attorney (select representation from the drop down box) and select the Attorney Type.
- When you have finished, click the **Add Party*** button.

Initiating Party (i.e. plaintiff, petitioner)

Additional Party (i.e. defendant, respondent)

Entity: Individual

Type: Plaintiff

First: Tom Middle: Last: Thompson Suffix:

Attorney: No Representation

You must click the **Add Party*** button to save this party.

Add Party **Cancel**

11. You will follow this process until all parties are entered.

12. Once you are done adding parties then click on the **Continue** button.

13. You are now taken to the Review and Submit level.

- To review and submit your transaction, click the **Continue*** button

Add Another Party **Continue >>**

Added Case Parties:

Party Name	Party Type	Attorney	Firm	Remove
Thompson, Tom	Plaintiff	No Answer on File	Firm TBD	Remove

Additional Parties

Party Name	Party Type	Remove
Johnson, John	Defendant	Remove

Initiating a Case through the Public Access Terminal

14. While in the Review screen, if you click on the blue Original File hyperlink, the attached document will display. The document title hyperlink displays the PDF version.

Authorized by: No Answer on File Submitted by: No Answer on File
Transaction ID: 52481304
Transaction Option: File a New Case
 Court: Mock Court-Filing & Serving
 Case Type: Personal Injury Case Class: Civil
Case Number: Case Name: Tom Thompson vs John Johnson

Case Parties: Thompson, Tom
 Johnson, John

On Behalf Of: Thompson, Tom

Document Title	Public/Sealed	Document Type	Conversion Status	Pages	Original
Complaint	No request for seal	Complaint	Converted	1	Original File
Case Information Cover Sheet	No request for seal	Case Information Cover Sheet	Converted	1	Original File

[Authorize](#) [Cancel](#)

15. Once you are finished reviewing, click **Authorize**. Once the page refreshes you will see a Transaction Receipt that shows the details of the transaction that you just submitted. You can print the Transaction Receipt, start a new transaction or complete your transaction by selecting the appropriate option on the screen.

Your transaction has been successfully submitted to File & ServeXpress. Your transaction information appears below. To print this information for your records, click this [Printer Friendly Version](#) link, then click the browser Print button. To perform another transaction, click [Begin a New Transaction*](#).

File & ServeXpress Transaction Receipt

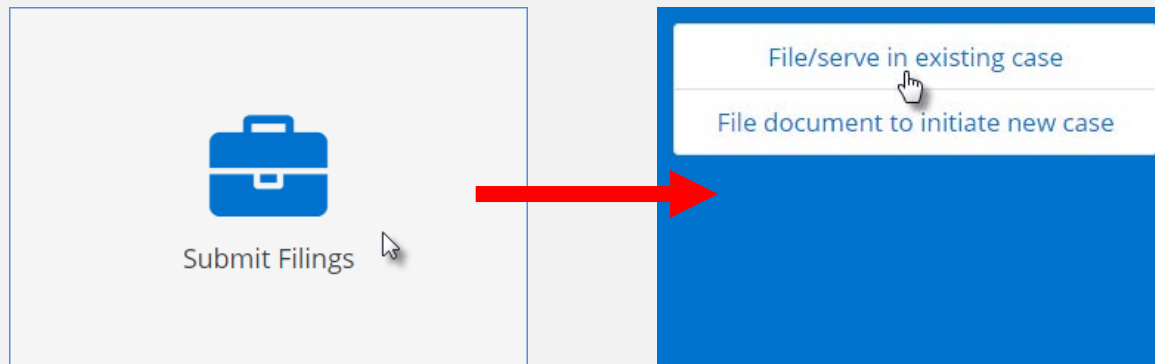
Authorized by: No Answer on File Submitted by: No Answer on File
Transaction ID: 52481307 Pro Se
Transaction Option: File a New Case Authorized: Jan 19 2018 11:18AM CST
 Court: Mock Court-Filing & Serving Case Class: Civil
 Case Type: Personal Injury Case Name: Tom Thompson vs John Johnson
Case Number:

Document Title	Public/Sealed	Document Type	Conversion Status	Pages	Original
Complaint	No request for seal	Complaint	Converted	1	Original File
Case Information Cover Sheet	No request for seal	Case Information Cover Sheet	Converted	1	Original File

[Begin a New Transaction](#) [Finished Transactions](#)

Submitting Transactions in Existing Cases through the Public Access Terminal

1. To submit a document in an existing case click on the File in existing case link.



2. The next screen is the Case Information level. Choose the Court to whom you wish to submit your document and click **Continue**.

Next, select your court from the list below:

- Click the radio button next to the court name
- Click **Continue*** below the list of courts

1 through 1 of 1

Court Name
<input checked="" type="radio"/> Mock Court-Filing & Serving

[Continue >>](#)

Submitting Transactions in Existing Cases through the Public Access Terminal

3. Once the court is selected, type in the case name or case number and click **Search**.

Next search for the case:

- Type all or part of your case name and/or number
- Click on **Search***

Case Name:

Case Number:

4. When the selected case appears, click on the radio button to the left of the case and click **Continue**.

Next, select your case:

- Click the radio button next to the case name
- Click **Continue*** below the list of cases

1 through 4 of 4

Case Number	Case Name	Court
<input type="radio"/> 123C-2012	Merritt vs Jones Co	Mock Court-Filing & Serving
<input checked="" type="radio"/> 2012CV999991-888	Transferred: 5/20/2013 Doe, John vs A B C Corp	Mock Court-Filing & Serving
<input type="radio"/> 2012L000123	Johnson, John vs XYZ Corp et al	Mock Court-Filing & Serving
<input type="radio"/> 2012NA00001-888	Doe, James vs John Smith et al	Mock Court-Filing & Serving

Submitting Transactions in Existing Cases through the Public Access Terminal

5. Select one of the following that applies to you:
 - » Choose the law firm that represents you; OR
 - » Choose “I am a party in the case and not represented by a law firm.”; OR
 - » Choose “I am a member of a law firm that is not listed above.”
 - » Or not represented by a law firm or add your law firm and click **Continue**.

Next select your law firm, not represented by a law firm, or add your law firm:

- Click on the radio button next to the desired selection
- Click on **Continue***

1 through 4 of 4

Firm
<input type="radio"/> Contingent Law Firm A
<input type="radio"/> Mock Firm A-Bellevue
<input type="radio"/> Mock Firm B
<input type="radio"/> Mock Firm C

- I am a party in the case and not represented by a law firm.
- I am a member of a law firm that is not listed above.

Continue >>

6. Choose your party from the list provided and click **Continue**.

Next select your name from the list below and click **select**.

1 through 2 of 2

Party Name	Party Type
<input checked="" type="radio"/> Joes Towing ,	Defendant
<input type="radio"/> Tonys Towing ,	Defendant

Continue >>

Submitting Transactions in Existing Cases through the Public Access Terminal

- At the Document Level you can attach your documents to the transaction. The steps for attaching a document are as follows:
 - Choose a document type from the Document Type dropdown.
 - Locate the document on your drive by clicking the *Choose File* button under the Add a document to your Transaction line.
 - Enter the title of your document in the Document Title field.
 - Choose the document “Access Level” (if selections are provided by the court) by choosing the appropriate radio button.

Next, add your documents:

- Select the document type (e.g. Motion for Summary Judgment).
- Click **Browse** to locate and select the document on your computer.
- Enter a document title that describes the document you are filing.
- Designate whether the document should be publicly accessible.
- Click **Add Document** to upload the document to the system.

Document Type:

Add a document to your Transaction:

Generic Sam...Answer.docx

Supported files are: .pdf, .txt, .doc, .docx, .rtf, .wpd, .tif, .tiff, .bmp, .jpg, .jpeg, .gif.

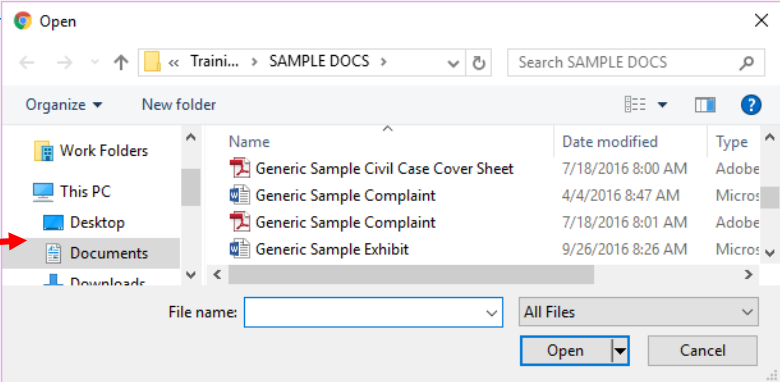
Document Title:
(e.g. Plaintiff's Personal Injury Complaint)

Request the court to handle this document as 'public', making it accessible to anyone viewing the case record.

Request the court to handle this document as 'sealed', making it accessible to the court, and organizations served or notified of service with the document.

Request the court to handle this document as 'in camera', making it accessible solely to the case judge.

This will be a main document.



Submitting Transactions in Existing Cases through the Public Access Terminal

8. Add any other documents you may wish to upload at this time by following the directions above. Indicate which document is the main document and which document(s) are the supporting documents.
9. Click **Continue**.

Next, click **Continue** to select your case party or to add another document:

- Select the document type (e.g. Motion for Summary Judgment).
- Click **Browse** to locate and select the document on your computer.
- Enter a document title that describes the document you are filing .
- Designate whether the document should be publicly accessible.
- Click **Add Document** to upload the document to the system.

Document Type: Case Information Cover Sheet ▼

Add a document to your Transaction:

Choose File No file chosen

Supported files are: .pdf, .txt, .doc, .docx, .rtf, .wpd, .tif, .tiff, .bmp, .jpg, .jpeg, .gif.

Document Title:

(e.g. Plaintiff's Personal Injury Complaint)

Case Information Cover Sheet

- Request the court to handle this document as 'public', making it accessible to anyone viewing the case record.
- Request the court to handle this document as 'sealed', making it accessible to the court, and organizations served or notified of service with the document.
- Request the court to handle this document as 'in camera', making it accessible solely to the case judge.

This will be Supporting: Set as Main Document ▼
Set as Main Document
Answer

Add Document Continue >>

Submitting Transactions in Existing Cases through the Public Access Terminal

10. The next screen is the Sending Parties level. At this screen you choose the parties on whose behalf you are submitting the document by clicking the radio button to the left of the party.

11. Click Continue once all your selections are made.

Next, select **Continue** to Review and Submit your transaction or to change your case party selections:

- Select one or more of the parties listed below
- Click **Save Selections**
- If the party on whose behalf you want to file is not listed, click **Add a New Party**.

Save Selections **Continue >>**

<input type="checkbox"/>	▲ Party Name	Attorney
<input type="checkbox"/>	A B C Corp	Attorney, Adam
<input type="checkbox"/>	A B C Corp	Lawyer, Lucy
<input type="checkbox"/>	Acme Motor Co	Attorney, Adam
<input type="checkbox"/>	Acme Supply Co	Contingent, Christopher
<input type="checkbox"/>	Bob's Towing	Attorney, Adam
<input type="checkbox"/>	D E F Corp	Advocate, Amy
<input type="checkbox"/>	Doe, James	Associate, Andrew
<input type="checkbox"/>	Doe, John	Attorney, Adam
<input checked="" type="checkbox"/>	Joes Towing	No Answer on File
<input type="checkbox"/>	Marcus, Marc	Attorney, Adam
<input type="checkbox"/>	Marcus, Mark	Litigator, Larry
<input type="checkbox"/>	Plaintiff	Robben, Eric
<input type="checkbox"/>	Tonys Towing	No Answer on File

Save Selections **Continue >>**

If you can not find your party in the case select **Add a New Party**.

Add a New Party

Submitting Transactions in Existing Cases through the Public Access Terminal

12. If you need to add additional parties, you can do so from this screen. To add new parties please take the following steps:
- » Click on the Add a New Party button
 - » Choose the type of entity (individual or organization)
 - » Choose the party type
 - » Enter the First, Middle and Last name of the party.
 - » Select the attorney and attorney type.
 - » Click Add Party to add the party to the case.

Next, select [Continue](#) to Review and Submit your transaction or to change your case party selections:

- Select one or more of the parties listed below
- Click [Save Selections](#)
- If the party on whose behalf you want to file is not listed, click [Add a New Party](#).

<input type="checkbox"/> Party Name	Attorney
<input type="checkbox"/> A B C Corp	Attorney, Adam
<input type="checkbox"/> A B C Corp	Lawyer, Lucy
<input type="checkbox"/> Acme Motor Co	Attorney, Adam
<input type="checkbox"/> Acme Supply Co	Contingent, Christopher
<input type="checkbox"/> Bob's Towing	Attorney, Adam
<input type="checkbox"/> D E F Corp	Advocate, Amy
<input type="checkbox"/> Doe, James	Associate, Andrew
<input type="checkbox"/> Doe, John	Attorney, Adam
<input checked="" type="checkbox"/> Joes Towing	No Answer on File
<input type="checkbox"/> Marcus, Marc	Attorney, Adam
<input type="checkbox"/> Marcus, Mark	Litigator, Larry
<input type="checkbox"/> Plaintiff	Robben, Eric
<input type="checkbox"/> Tonys Towing	No Answer on File

[Save Selections](#) [Continue >>](#)

If you can not find your party in the case select [Add a New Party](#).

[Add a New Party](#)

13. Click **Continue**.

14. You are now at the Review & Submit level.

Submitting Transactions in Existing Cases through the Public Access Terminal

15. While in the Review screen, if you click on the blue Original File hyperlink, the attached document will display. The document title hyperlink displays the PDF version.

Authorized by: No Answer on File **Submitted by:** No Answer on File
Transaction ID: 52481308

Transaction Option: File in an Existing Case
Court: Mock Court-Filing & Serving
Case Type: Personal Injury **Case Class:** Civil
Case Number: 2012CV999991-888 **Case Name:** Transferred: 5/20/2013 Doe, John vs A B C Corp
Added Parties: None
On Behalf Of: Joes Towing

Transaction Document List

Document Title	Public/Sealed	Document Type	Conversion Status	Pages	Original
Answer	No request for seal	Answer	Converted	1	Original File
Case Information Cover Sheet	No request for seal	Case Information Cover Sheet	Converted	1	Original File

Authorize
Cancel

16. Once you are finished reviewing, click **Authorize**. Once the page refreshes you will see a Transaction Receipt that shows the details of the transaction that you just submitted. You can print the Transaction Receipt, start a new transaction or complete your transaction by selecting the appropriate option on the screen.

Your transaction has been successfully submitted to File & ServeXpress. Your transaction information appears below.
 To print this information for your records, click this [Printer Friendly Version](#) link, then click the browser Print button.
 To perform another transaction, click [Begin a New Transaction*](#).

File & ServeXpress Transaction Receipt

Authorized by: No Answer on File **Submitted by:** No Answer on File
Pro Se
Transaction ID: 52481308
Transaction Option: File in an Existing Case **Authorized:** Jan 19 2018 11:50AM CST
Court: Mock Court-Filing & Serving
Case Type: Personal Injury **Case Class:** Civil
Case Number: 2012CV999991-888 **Case Name:** Transferred: 5/20/2013 Doe, John vs A B C Corp

Transaction Document List

Document Title	Public/Sealed	Document Type	Conversion Status	Pages	Original
Answer	No request for seal	Answer	Converted	1	Original File
Case Information Cover Sheet	No request for seal	Case Information Cover Sheet	Converted	1	Original File

Begin a New Transaction
Finished Transactions