



File & Serve *Xpress*<sup>™</sup>

# New Case Filing

User Guide

# New Case Filing

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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

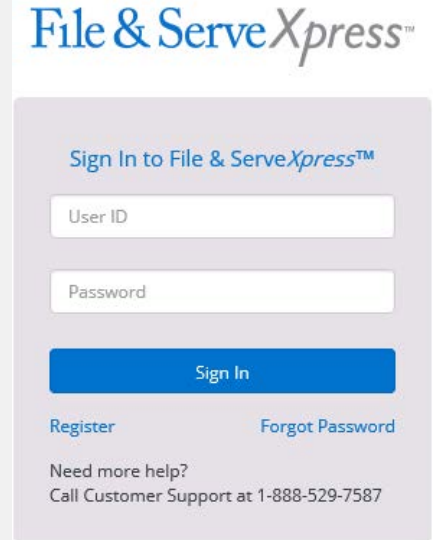
# New Case Filing Overview

The File and ServeXpress Quick Guide provides a convenient source of information to help you efficiently eFile a new case..

## Before You Begin

1. Refer to the appropriate court rules on electronic filing prior to using File & ServeXpress to ensure you are in compliance with local requirements. Copies of the rules can be found on the Resource Center once logged into the application.
2. Check our minimum system requirements to be sure your computer is correctly configured for using File & ServeXpress.
3. All tables are sortable. Any time a grid or table appears, click the column headings to sort by that information.
4. Hyperlinks take you to additional information – don't forget to use them!
5. When running searches, less is more. Enter only partial information to get the most results.
6. The fastest way to access a transaction is with a Transaction ID.
7. When using File & ServeXpress for the first time, or if you need assistance, call our 24/7 Client support line at 1-888-529-7587.

## Signing on to File & ServeXpress:



File & ServeXpress™

Sign In to File & ServeXpress™

User ID

Password

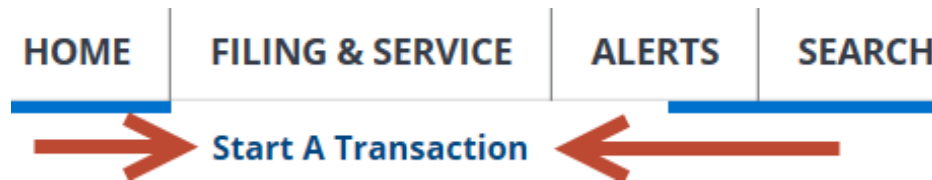
Sign In

Register      Forgot Password

Need more help?  
Call Customer Support at 1-888-529-7587

1. Before using File & ServeXpress, you must have an ID and password. If you do not have these, contact Client Support.
2. Open your internet browser and go to <https://fileandservexpress.com>
3. Enter your assigned ID and password and click Sign in.

# Filing & Service



There are 4 easy steps to submitting documents using the File & ServeXpress “Filing & Service” tab to E-file a new case. Each of these steps is detailed in this guide:

1. **Start A Transaction Queue** - Allows you to select a case to E-file and/or E-serve into.
2. **Documents Tab** - Lets you select the type of document you are submitting and attach your documents.
3. **Case Parties Tab** - Allows you to enter parties named in the case.
4. **Review & Submit Tab** - Allows you to review your work and submit the transaction to the court.

## Filing & Service Tab Tips:

### ✓ Saved Transactions Queue:

#### Saved Transactions

The File & ServeXpress system is designed to save your work as you go. If you lose connectivity or power for any reason, check your Saved Transactions to resume work on an unfinished transaction.

### ✓ Scheduled Transactions Queue:

#### Scheduled Transactions

File & ServeXpress allows users to schedule submittals of transactions for future dates and times. Users can update/delete these transactions in the Scheduled Transactions queue up to the date and time they are scheduled to be submitted.

# Efiling A New Case

HOME | **FILING & SERVICE** | ALERTS | SEARCH

Start A Transaction | Saved Transactions | Scheduled Transactions

Select Court and/or Case for Filing Cancel

File and/or Serve in an Existing Case  **File a New Case**  File and/or Serve in Multiple Cases

To narrow the list below, select a court and/or enter the county and click Find.

Court:  ▼

**Find** ?

Follow these steps:

1. Select **File a New Case** radio button.
2. Select the appropriate **Court** using the dropdown menu.
3. Click **Find**.
4. Select the appropriate case class from the **Court List** by selecting the red box with a white arrow to the left of the proper class.

HOME | **FILING & SERVICE** | ALERTS | SEARCH

Start A Transaction | Saved Transactions | Scheduled Transactions

11/16/17 4:21 PM EST

Select Court and/or Case for Filing Cancel

File and/or Serve in an Existing Case  **File a New Case**  File and/or Serve in Multiple Cases

To narrow the list below, select a court and/or enter the county and click Find.

Court:  ▼

**Find** ?

Click  beside a court to select the court for your case.

**Court List** 1 through 2 of 2 Show 50 results per page

<input type="checkbox"/>	Court Name	Case Class	County	State	Court Level
<input type="checkbox"/>	WA MOCK Marion County Circuit & Superior Courts	Civil		WA	State
<input type="checkbox"/>	WA MOCK Marion County Circuit & Superior Courts	Civil-Other		WA	State

## Efiling A New Case Tips:

- ✓ **Note:** A new case is a case that does not have a case number assigned assigned buy a court clerk.
- ✓ **File and/or Serve in Multiple Cases:** This function is never used in Colorado.
- ✓ **Case Name:** Only enter the abbreviated form of a case name (e.g. Smith, Sue vs Asbestos Defendants).
- ✓ **Naming a Plaintiff:** If the plaintiff is an individual, enter "last name, first name vs defendant name". Defendants do not need to be listed in "last name, first name" form. (e.g.

## Add New Case

Enter a case name and select a case type. Then click **Submit**.

**Court** Mock Court-Filing & Serving

**Case Class**

Civil

**Case Type**

**Case Name**

Maximum length of text is 200 characters



5. Select the appropriate **Case Type** from the drop down list.
6. Enter the **Case Name** using the naming convention: Last name, First Name vs Defendant.
7. Click **Submit**.
8. A **Case** tab will appear and can be used to make updates or changes to the information entered above.

<b>Start A Transaction</b>		<b>Saved Transactions</b>	<b>Scheduled Transactions</b>	
11/16/17 4:49 PM EST	<b>Case</b>	Documents	Case Parties	Review & Submit
<b>Add New Case</b>				

# Documents

Start A Transaction | Saved Transactions | Scheduled Transactions

11/16/17 4:56 PM EST | Case | **Documents** | Case Parties | Review & Submit

**Attach Documents**

ABC Collections v Doe WA MOCK Marion County Circuit & Superior Courts

- The **Documents Tab** is where users will browse for documents and attach them to be filed into the court.
  - Choose the correct **Document Type**. Document types with an asterisk (\*) or \*\*) denote acceptable filing types to open a new case (e.g. Complaint, Petition).
  - Click the **Choose a File** button to browse your computer's hard drive for the document you wish to attach.
  - Choose the appropriate **Access** level (e.g. Public, Sealed, Suppressed, etc.).
  - Enter the **Title** of the document.
  - Click **Attach Document**.
- The **Attached Documents List** allows users to view the PDF version of their documents that the court will see. Click the "Click here to refresh conversion status" link to update the document conversion and then click on the document title to view the document.
- The **Remove** link will purge the document from the system.
- The **Modify** link will take the user one step back to modify the document information.
- When all documents have been attached and associated, click the Case Parties tab.

Attached Documents List [Click here to refresh document conversion status](#)

Initiating Document	ID	Document Type	Access	Conversion Status	Main/Supporting	Linked To:	Modify	Remove
<input checked="" type="radio"/>	34875585	Complaint - Collections - 1 Defendant **	Public	Converting	Main ▾	None Edit Link	Modify	Remove
Document Title: ABC Collections v Doe Complaint								

## Document Tab Tips:

- ✓ **Scheduled Transactions Queue:** File & ServeXpress allows users to schedule submittals of transactions for future dates and times. Users can update/delete these transactions in the Scheduled Transactions queue up to the date and time it is scheduled to be submitted.
- ✓ **Cancel Link:** This function will purge the entire transaction from the system.
- ✓ **Save & Close Link:** This function will save all information for this transaction in the Saved Transactions queue until the transaction is resumed.
- ✓ **Main/Supporting:** This option lets the user subordinate a document and "electronically staple" it to the document it supports. In the column by each supporting document, select the document ID for the main document to which it supports.



# Case Parties

11/16/17 5:30 PM EST Case Documents **Case Parties** Review & Submit

**Add Case Parties** Transaction ID: 52479983 Cancel Save & Close

ABC Collections v Doe WA MOCK Marion County Circuit & Superior Courts

Enter or select information for each party you want to add to this case. Then click **Save Party**.  
To edit a party, select the party from the **Party List**.

Initiating Party (e.g. plaintiff, petitioner)  
 **Additional Party** (e.g. defendant, respondent)

\* Party  \* Entity

\* Party Name First Name Middle Name Last Name Suffix

?

Parties in Case  
IP ABC Collections,  
AP Doe, John

1. The **Case Parties Tab** is where users will enter case party information.
  - a. Choose the **Initiating Party (IP)** radio button.
  - b. Choose the correct **Party and Entity** type using the drop down menus.
  - c. Enter **Initiating Party** information in the open fields.
  - d. Select the **Attorney and Attorney Type** using the drop down menus.
  - e. Click **Save Party**.
2. To add **Additional Parties**:
  - a. Click the **Additional Party (AP)** radio button
  - b. Choose the correct **Party and Entity** type using the drop down menus.
  - c. Enter **Additional Party** information.
  - d. Click **Save Party**.
3. Follow the same process above to continue to add parties.

## Case Parties Tab Tips:

- ✓ **Initiating parties:** Initiating parties are the clients your office represents in the case. All required fields are red and have an asterisk (\*). Some courts require additional information to be provided. For example: Address Information, City, State and Zip.
- ✓ **IP and AP:** IP is the initiating party and AP is the additional party.
- ✓ **When adding a new party:**
  - a. Do not include "The" in company names.
  - b. Use "&" instead of the word "and".
  - c. Avoid punctuation in company names.
  - d. Always abbreviate Inc., Corp., Co.
  - e. If you want to add aliases (dba's and aka's), add them as separate parties.
  - f. Place a space between parties with Initials in the name (i.e. A W Chesterson, A P Green, A I S Insurance).
- ✓ Note: Designating an attorney to represent Additional Parties is not required.

# Review & Submit Tab

Start A Transaction	Saved Transactions	Scheduled Transactions		
11/16/17 6:11 PM EST	Case	Documents	Case Parties	<b>Review &amp; Submit</b>
<b>Authorize Transaction</b>				
ABC Collections v Doe WA MOCK Marion County Circuit & Superior Courts				
<b>Select an attorney to authorize this transaction.</b>				
Authorizing Attorney: <input type="text" value="Select an authorizing attorney"/>				
<hr/>				
<b>Delivery Options:</b>				
<input type="checkbox"/> am sending these documents as "Court-Appointed Counsel/ADR".				
<hr/>				
<b>Add billing reference. This reference will appear on your invoice.</b>				
<input type="text"/>				
<hr/>				
<b>Note to Clerk (optional):</b>				
If you wish to send a note to the court along with your transaction, please enter it in the space provided. Please note that this field is not to be used as an official method of communication with the court. This field will only be viewable by you and the court users.				
<input type="text"/>				
Maximum length of text is 500 characters				
<hr/>				
<b>Choose to submit transaction now, or schedule the transaction for later release.</b>				
<input checked="" type="radio"/> Authorize and file now				
<input type="radio"/> Authorize and file on				
<input type="text"/> / <input type="text"/> / <input type="text"/> at <input type="text"/> : <input type="text"/> AM <input type="text"/> (mm/dd/yyyy) at (hh:mm) ET				
<hr/>				
<b>IMPORTANT:</b> Your transaction has not yet been submitted. You will next be asked to review and submit your transaction.				
<input type="button" value="Next"/>				

## Review & Submit Tab Tips:

- ✓ **Billing Reference:** This is an internal function and will only be seen by the filing party.
- ✓ **Court Appointed Counsel Box:** Only use if you meet the stipulations for doing so.

Start A Transaction		Saved Transactions		Scheduled Transactions	
11/16/17 6:21 PM EST	Case	Documents	Case Parties	Review & Submit	
<b>Review and Submit</b>					
ABC Collections v Doe WA MOCK Marion County Circuit & Superior Courts					
<b>IMPORTANT: Your transaction has not yet been submitted.</b>					
<b>When you have finished reviewing, select Submit Transaction below.</b>					
File & ServeXpress Transaction ID:		52479983			
Submitted by:		Adam Attorney, Mock Firm A-Bellevue			
Authorized by:		Andrew Associate, Mock Firm A-Bellevue <a href="#">Edit</a>			
Court:		WA MOCK Marion County Circuit & Superior Courts			
Case Class:		Civil			
Case Type:		Collections			
Case Name:		ABC Collections v Doe			
Transaction Option:		Originating Event			
Billing Reference:		1234 <a href="#">Edit</a>			

## Review & Submit Tab Tips:

- ✓ **Clerk Review:** Once the Court Clerk reviews the filing, you will receive an email containing the case number, judge assignment, and other pertinent information. Remember to complete Service of Process traditionally. For more information on Service of Process of e-filed documents, contact your account manager.

5. Review the summary information.
6. To make any changes to your information, click the edit link provided in that section or click the tab containing the information to be changed.
7. **Submit Transaction** When the information has been verified and you are ready to proceed, click **Submit Transaction**.
8. A Transaction Receipt appears containing your date and time of filing “stamp”, print a copy for your records.

# Transaction Receipt / Report

Start A Transaction

Saved Transactions

Scheduled Transactions

11/16/17 6:36 PM EST

Your transaction has been successfully submitted to File & ServeXpress. Your transaction information appears below. To print this information for your records, click anywhere on the transaction information, then click the browser Print button.

For a formatted copy of this information, obtain a [transaction report](#).

To perform another transaction, click [Begin a New Transaction](#).

To exit Filing & Service, click [Return to My File & ServeXpress](#).

## File & ServeXpress Transaction Receipt

**File & ServeXpress Transaction ID:** 52479983  
**Submitted by:** Adam Attorney, Mock Firm A-Bellevue  
**Authorized by:** Andrew Associate, Mock Firm A-Bellevue  
**Authorize and file on:** Nov 16 2017 4:43PM EST 

**Court:** WA MOCK Marion County Circuit & Superior Courts  
**Case Class:** Civil  
**Case Type:** Collections  
**Case Name:** ABC Collections v Doe

**Transaction Option:** Originating Event  
**Billing Reference:** 1234

- Once you click the Submit tab, the page will refresh and you will see a Transaction Receipt. You may print this receipt off for your records or search for it on File & Serve by Transaction ID in the future.
- You may order a “Transaction Report” after the transaction is submitted. This report is a comprehensive, up to the date, document that will provide all of the transaction details, including Clerk & Judge review (if applicable) -- with the option of ordering the “read status” as well. Simply click the link on the top that says “transaction report”.


## Transaction Receipt / Report Tips:

- ✓ **Sample Transaction Report:**

**File & ServeXpress**

November 17, 2017

Adam Attorney  
 Mock Firm A-Bellevue  
 13427 NE 16th Street  
 Bellevue, WA 98005



RE: File & ServeXpress Transaction No. 52479983

Dear Customer:

The following information for File & ServeXpress Transaction 52479983 reflects the details of the transaction contained in the File & ServeXpress system as of November 17, 2017 02:12:24 PM PST.

Lucy Lawyer, authorized by Lucy Lawyer, submitted Transaction 52479983 on November 14, 2017 11:00:11 AM PST to CA Court, via File & ServeXpress for the following case:

Case Number	Case Name	Division	Judge
2017C1277	Mock Collections Agency vs Tom Thomas	1 - Division 1	Ca H Judge J

The Transaction contained 2 documents filed as follows:

ID	Document	Pages	Clerk Review Status	Judge Review Status
4323246	Answer	1	Accepted 11/16/2017 11:21:29 AM PST	Pending
4323246	Motion For Default Judgment	1	Accepted 11/16/2017 11:21:29 AM PST	N/A

The above-mentioned documents within this Transaction were sent to the following 1 recipient:

Attorney	Party	Notice Type	Delivery Method	Delivery Status
Mock Firm A-Bellevue Adam Attorney	Mock Collections Agency Plaintiff	Service	E-Service	Delivered

Should you have any questions about the details of the Transaction as stated above, please contact Customer Support at 1-888-619-7587.

Sincerely,  
 File & ServeXpress Holdings, LLC

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