

File & Serve *Xpress*™

IL Madison County Multi-Case Filings

User Guide



IL Madison Multi-Case Filings

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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

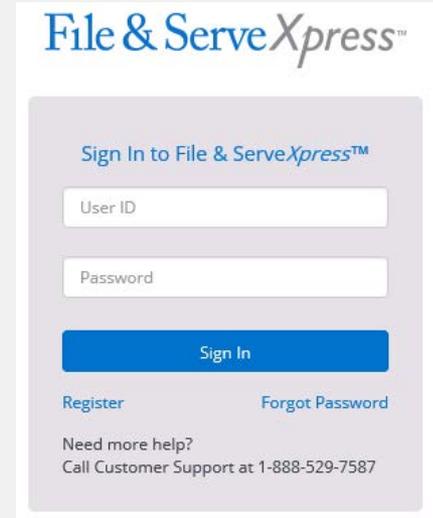
Madison County Multi Case Filings Overview

The File and ServeXpress Quick Guide provides a convenient source of information to help you efficiently file and serve your documents into more than one 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:



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 Tab

There are 7 easy steps to submitting documents into multiple cases using the File & ServeXpress “Filing & Service” tab. 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. **Case Tab** - Lets you look at the list of cases you have selected to submit documents into.
3. **Documents Tab** - Lets you select the type of document you are submitting and attach your documents.
4. **Sending Parties Tab** - Allows you to select the client for which you are submitting the transaction.
5. **Service Tab** - Allows you to select the recipients of the transaction you are submitting.
6. **Additional Recipients Tab** - Lets you send the transaction to recipients not on the service list (i.e. your client or co-counsel).
7. **Review & Submit Tab** - Allows you to review your work and submit the transaction to the court and other parties.

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.

Start A Transaction Queue

To E-file and/or E-serve into an Existing Case, follow these steps:

1. To begin the filing/serving process, click the Filing & Service tab. The Start A Transaction queue appears.
2. Click the File and/or Serve in multiple cases radio button.

HOME **FILING & SERVICE** ALERTS SEARCH

Start A Transaction Saved Transactions Scheduled Transactions

11/16/17 2:19 PM CST

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: IL Madison 3rd Judicial Circuit Court Case Class: Law - Asbestos

Case Name: Case Number:

File Only/File with the court and serve selected parties: Serve Only:

*Please consult the Resource Center for filing requirements and restrictions

Find View Case Groups Advanced Search ?

3. From the drop down menu, select the court in which you choose to file. Click Find.
4. All available cases will appear in a list:

Select cases and click **Begin Transaction**.

Case List **Begin Transaction** View Selected Create Case Group

1 through 50 of 1070 results per page

<input type="checkbox"/>	Case Number	Case Name	Case Type	Case Class	State	Court	County
<input checked="" type="checkbox"/>	2014L 448029	001 MDPARTY VS. 003 MDPARTY	Asbestos - Deferred	Law - Asbestos	IL	IL Madison 3rd Judicial Circuit Court	
<input checked="" type="checkbox"/>	2014L 381317	001 TEST VS. 002 TEST	Asbestos - Negligence	Law - Asbestos	IL	IL Madison 3rd Judicial Circuit Court	
<input checked="" type="checkbox"/>	2014L 684508	021 PARTY15 VS. 023 PARTY15	Asbestos - Negligence	Law - Asbestos	IL	IL Madison 3rd Judicial Circuit Court	
<input type="checkbox"/>	2017L 786732	1 1 1 VS. 2 2 2	Asbestos - Negligence	Law - Asbestos	IL	IL Madison 3rd Judicial Circuit Court	

Filing Into Multiple Cases Tips:

- ✓ Note that you can also search for cases by searching a partial case name or case number, clicking the Find button and checking that case and repeating the process for any other case you wish to add. This is helpful if you are adding a few cases or if your Court has an exceptionally large amount of cases available for filing into.
- ✓ Note that you can also enter a partial case name or case number if you are searching for specific cases

5. To select cases, click the boxes to the left of the desired case numbers.
6. Choose either the radio button for “File Only/File with the court and serve selected parties” or “ Serve Only”.
7. Click Begin Transaction, located at the top of the list of cases.
8. The page will refresh and several additional tabs will appear. The Documents Tab will appear by default:

Case **Documents** | Sending Parties | Service | Add'l Recipients | Review & Submit

9. To view your selected cases or add additional ones, click on the Case Tab:

11/16/17 2:55 PM CST **Case** Documents | Sending Parties | Service | Add'l Recipients | Review & Submit

Select Multiple Cases Transaction ID: 52479980 Cancel Save & Close

Court: IL Madison 3rd Judicial Circuit Court Case Class: Law - Asbestos Selected Cases

Case Name: All Cases

Case Number:

Click **Add Cases** to save changes.

Case List

1 through 3 of 3 Show results per page

<input type="checkbox"/>	Case Number	Case Name	Case Type	Case Class	State	Court	County
<input checked="" type="checkbox"/>	2014L 381317	001 TEST VS. 002 TEST	Asbestos - Negligence	Law - Asbestos	IL	IL Madison 3rd Judicial Circuit Court	
<input checked="" type="checkbox"/>	2014L 448029	001 MDPARTY VS. 003 MDPARTY	Asbestos - Deferred	Law - Asbestos	IL	IL Madison 3rd Judicial Circuit Court	

Filing Into Multiple Cases Tips:

Create Case Group

- ✓ **Create Case Group Button:** This button allows you save your group selection as a “Case Group” for future transactions. After selecting your cases, type the name of your group in the space provided at the top of the list and click Create Case Group.

View Case Groups

- ✓ **View Case Groups Button:** To Select a Case Group click View Case Groups. A list of your firms Case Groups will appear. To select a Case Group for filing, click the arrow button beside the group name. Once a case group has been created it can be used by all users at the firm.

Documents Tab

9/13/18 11:46 AM CDT

Documents

Sending Parties

Service

Add'l Recipients

Review & Submit

Attach Documents

Transaction ID: 52497294

Cancel

Save & Close

123C-2012 Merritt vs Jones Co Mock Court-Filing & Serving

For each document, complete each field and click **Attach Document**.

Category

Select a Filing Category

Type *

Select a Filing Category First

Title *

Title

Maximum length of text is 510 characters

Access

Public

Public - These documents are electronically submitted and available for viewing by File & ServeXpress customers.

File *

Choose a file

Statutory Transaction Fee: None

To request our Fax Upload Service please contact client support.

Attach Document ?

1. Select a **Category** (in applicable jurisdictions).
2. Select a Document Type for your document using the drop down menu entitled **Type**.
3. To attach your document, click the **Choose File** button. A dialog box will open. Locate the file you saved to your hard drive or network and double-click.
4. Enter the title in the Title field. The title should comply with local rules for e-filing.
5. Select an access type for your filing – access is defined by each court but may include:
 - **Public:** The document is a publicly filed instrument.
 - **Filed Conventionally:** Some courts use this option as a placeholder in the electronic docket to indicate that documents have been filed in paper at the Court.
 - **In camera:** Documents designated as in camera are only viewable by the Judge on the case. Other court personnel, attorneys or firms on the case cannot access in camera documents.
 - **Sealed:** Sealed documents may be handled in one of two ways, depending on how the receiving court has opted to handle sealed instruments:

Document Tab Tips:

- ✓ **Transaction ID:** This number is the tracking number for this transaction and can be used to view the details of the transaction within the File & ServeXpress system.
- ✓ **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.
- ✓ If you have documents to upload that are not in electronic format, you may select the Check here to fax your document box. For detailed information on how to fax documents to File & ServeXpress, click the blue box.
- ✓ Please note that additional charges will apply if you choose to use the fax filing feature.

Document Tab Tips:

- ✓ When uploading your documents, you can check the document by clicking on the hyperlinked Document Title in the Attached Documents list.

- The sealed document can be attached to the e-filed transaction and only available online to the court and served parties.
- The court may require that the documents be filed in hard copy with the court and that a placeholder be e-filed into the electronic docket.

- Click Attach Document. The document will appear in the Attached Documents list:

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

ID	Document Type	Access	Conversion Status	Main/Supporting	Linked To:	Modify	Remove
34875582	Answer	Secure Public	Converted	Main ▾	None Edit Link	Modify	Remove
Document Title: Defendant ABC Corps Answer to Complaint							

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

ID	Document Type	Access	Conversion Status	Main/Supporting	Linked To:	Modify	Remove
34875582	Answer	Secure Public	Converted	Main ▾	None Edit Link	Modify	Remove
Document Title: Defendant ABC Corps Answer to Complaint							

- To add more documents, repeat steps 1-5.
- When filing supporting documents, do not use the Main/Supporting feature to reflect an association. Documents included in IL Madison multicase eFilings should all be labeled as “Main” documents.
- If you need to remove a document, click the Remove link next to the document you wish to delete from the Filing.
- When all of the documents have been attached and associated, click the Sending Parties tab to continue.

Sending Parties Tab

1. To select the party or parties you represent for each case place a check in the box next to the party name in the Parties Available for Selection list.

11/16/17 3:06 PM CST Case Documents **Sending Parties** Service Add'l Recipients Review & Submit

Select Sending Parties Transaction ID: 52479980 Cancel Save & Close

Multi-Case IL Madison 3rd Judicial Circuit Court

Search Custom Groups ?

Create Custom Group

Parties with Representation Available for Selection.
Any attorney additions to cases will remain in Pending status until the court accepts your transaction.

Show 10 entries

<input type="checkbox"/>	Party	Case Number	Party Type	Party Status	Attorney	Firm
<input checked="" type="checkbox"/>	001, TEST	2014L 381317	Plaintiff	Active	Fields, Matthew R	Danna McKittrick PC
<input checked="" type="checkbox"/>	002, MDPARTY	2014L 448029	Plaintiff	Active	Fields, Matthew R	Danna McKittrick PC
<input checked="" type="checkbox"/>	021, PARTY15	2014L 684508	Plaintiff	Active	Fields, Matthew R	Danna McKittrick PC

Showing 1 to 3 of 3 entries Previous 1 Next

* Note (case Number Column): To assist filers with finding their represented parties by case, FSX will now display the case number on the Sending Parties tab for multicase eFiling. This additional column will not show for multicase eService.

2. Click the Service tab to continue.

Sending Parties Tab Tips:

- ✓ **Adding a Party/Attorney to a Case:** Adding a Party/Attorney “on the fly” is not available for multicase e-Filing in IL, Madison so that a filer does not inadvertently add their party/attorney to all cases in the multicase transaction. Also, this is not allowed for multicase e-Service. In both instances, these changes require Court approval.

Create Custom Group

- ✓ You can save your selection as a Custom Group for future transactions. After selecting your parties, type the name of your group in the space provided, then click Create Custom Group.

Custom Groups

- ✓ To use a custom group click Custom Groups. A list of your custom groups will appear. Select the custom group you wish to use for Sending by clicking the check mark box beside the name.

Service Tab

- To select a party/parties to receive Service place a check in the corresponding box in the Service column next to the party names.

11/16/17 4:02 PM CST Case Documents Sending Parties **Service** Add'l Recipients Review & Submit

Select Recipients Transaction ID: 52479985 Cancel Save & Close

Multi-Case IL Madison 3rd Judicial Circuit Court

Search Custom Groups ?

Select a delivery option for each party you want to add. "Service" is official legal service upon the selected party. To remove a selected party, deselect service.

YOUR ORGANIZATION WILL INCUR ADDITIONAL POSTAGE AND COPYING FEES FOR SERVING PARTIES DESIGNATED FOR SERVICE VIA US MAIL OR FAX. CHECK THE ADDITIONAL SERVICES PRICING SHEET IN THE RESOURCE CENTER FOR COMPLETE COSTS.

Create Custom Group

Viewing: E-Service only All active participants

Show 10 entries

Party	Case Number	Party Type	Party Status	Attorney	Firm	Method
<input checked="" type="checkbox"/> JOHN CRANE INC	2012L 002096	Defendant	Active	Burns, Edward	OConnell Tivin Miller & Burns LLC	EService
<input checked="" type="checkbox"/> JOHN CRANE INC	2007L 000029	Defendant	Active	Donahue, Daniel	Foley & Mansfield-St Louis	EService
<input checked="" type="checkbox"/> JOHN CRANE INC	2007L 000809	Defendant	Active	Bronsky, Aj	Brown & James-Asbestos	EService
<input checked="" type="checkbox"/> KAISER GYPSUM COMPANY INC	2012L 002096	Defendant	Active	Moore, Steven B	Rasmussen Willis Dickey & Moore LLC	EService
<input checked="" type="checkbox"/> KAISER GYPSUM COMPANY INC	2012L 002096	Defendant	Active	Szlanfucht, David L	Rasmussen Willis Dickey & Moore LLC	EService
<input checked="" type="checkbox"/> KAISER GYPSUM COMPANY INC	2012L 002096	Defendant	Active	CROSS, BILL	CROSS, BILL	EService
<input type="checkbox"/> MAREMONT CORPORATION	2007L 000029	Defendant	Active	Ybarra, David W	Greensfelder Hemker & Gale PC-Belleville	EService
<input type="checkbox"/> METROPOLITAN LIFE INSURANCE COMPANY	2011L 001317	Defendant	Active	Joley, Charles L	Joley Nussbaumer Oliver & Beasley PC	EService
<input type="checkbox"/> METROPOLITAN LIFE INSURANCE COMPANY	2012L 002096	Defendant	Active	Joley, Charles L	Joley Nussbaumer Oliver & Beasley PC	EService
<input type="checkbox"/> METROPOLITAN LIFE INSURANCE COMPANY	2011L 001317	Defendant	Active	Nussbaumer, Kenneth M	Joley Nussbaumer Oliver & Beasley PC	EService

Showing 71 to 80 of 126 entries

Previous 1 7 8 9 13 Next

* **Note (case Number Column):** To assist filers with finding their represented parties by case, FSX will now display the case number on the Sending Parties tab for multicase eFiling. This additional column will not show for multicase eService.

- To select all parties, click the box below service on the gray header bar.
- The Method column shows the method of service (e-Service, US Mail, Fax).
 - If the recipient is a registered user of File & ServeXpress, then the documents or notice will be delivered to their online account.

Service Tab Tips:

- ✓ **Serving Pro Se Parties:** If available in the court you are filing in, you may be able to serve a Pro Se or Pro Per party by typing in a U.S. Mail delivery address. You will be prompted to enter an address for each Pro Se or Pro Per party you select to serve via regular U.S. Mail.
- ✓ The most recently used addresses will display for each party you have selected to serve. You can use the address provided or enter your own address. The source of the information will appear in the Entered By field.
- ✓ You can opt to share this address with other E-filers, or you can mark it as "private" so that it will be available only to your firm.
- ✓ If you do not want to serve the Pro Se party, click the Do Not Serve This Party radio button.
- ✓ Service to a Pro Se/Pro Per party via File & ServeXpress will be completed via regular U.S. Mail and is not guaranteed if the information you provide is not accurate.

- b) If the recipient is not a registered user, then the documents will be delivered via traditional methods (US Mail or Fax) depending on the rules of service for that particular Court.
4. If a checkbox does not appear for you to select, then you cannot use File & ServeXpress as a delivery method to send documents to that party. You will have to send service to that party via traditional means.
5. Click the Additional Recipients Tab to continue.

Service Tab Tips:

Create Case Group

- ✓ You can save your selection as a Custom Group for future transactions. After selecting your parties, type the name of your group in the space provided, then click Create Custom Group.

Custom Groups

- ✓ To use a custom group click Custom Groups. A list of your custom groups will appear. Select the custom group you wish to use for Sending by clicking the check mark box beside the name.

Additional Recipients Tab

Service Tab Tips:

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

11/16/17 4:06 PM CST Case Documents Sending Parties Service **Add'l Recipients** Review & Submit

Select Additional Recipients Transaction ID: 52479985 Cancel Save & Close

Multi-Case IL Madison 3rd Judicial Circuit Court

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**

First Name Last Name

Email Organization

Find **Clear** ?

First Name Last Name

Email Organization

Find **Clear** ?

Select each person you want to add as an additional recipient and, for each, indicate if you want to add them to the recipient list or create a new recipient. You can select or deselect them.

1 through 5 of 5 **Add to Recipient List** **Create Additional Recipient**

Select	Send	First Name	Last Name	Organization	Email
<input type="checkbox"/>	<input checked="" type="radio"/> Online	Janet	Jones	Foo And Fooski	dbfsx1+janet@gm

1. The system requires a user to initially “search” for an additional recipient before being given the option to create a new additional recipient.
2. Search results will display both File & ServeXpress subscribers and non-member users.
3. If no results appear, click the Create Additional Recipient button.
4. Enter both a First and Last Name and will then select either “Online” or “Fax” as the delivery method.
5. After entering a new Additional Recipient, the system will then create a non-member “account” for the additional recipient. The recipient will receive an email with an ID/Password for the sole purpose of retrieving the documents in your transaction. Instructions will be included.
6. That non-member account will now appear in the search results when filers search the name and will display the notification method previously entered for the additional recipient non-member.

Review & Submit Tab

11/16/17 5:20 PM EST Case Documents Sending Parties Service Add'l Recipients **Review & Submit**

Authorize Transaction Transaction ID: 52479973 Cancel Save & Close

Multi-Case WV Kanawha County Circuit Court

Select an attorney to authorize this transaction.

Authorizing Attorney:

1. Select an authorizing attorney from your office in the dropdown list.

Case Number:

File Only/File with the court and serve selected parties:

Serve Only:

*Please consult the Resource Center for filing requirement

[Find](#) [View Case Groups](#) [Advanced Search](#) [?](#)

2. Depending on what you selected on the “Start a Transaction” tab (File Only/File and Serve, or Serve Only), the following delivery options will be displayed:
 - **File and Serve:** The transaction will be filed with the court and served to all designated recipients. It will be available to be viewed and purchased by registered File & ServeXpress users as a publicly-filed instrument.
 - **Serve Only – Private:** Sends the transaction ONLY to your selected service recipients. The document IS NOT filed with a court. It is not available to any registered File & Serve users that you did not select for service, and may not be viewed or purchased as a publicly filed document.

- **Serve Only – Public:** Sends the transactions ONLY to your selected service recipients. The document IS NOT filed with a court. The document is available to be searched, viewed, printed and purchased by any registered File & ServeXpress users as a publicly available document unless the transaction is submitted in a Service Only jurisdiction. If the document is served in a Service only jurisdiction, the document is only viewable by other users within the same litigation.

Add billing reference. This reference will appear on your invoice.

3. Enter any billing information you want included on your invoice.
4. If you would like to pre-order a “Read Status” report that shows when an e-served recipient opened the transaction, click the box as shown. (A one-time fee applies – anyone in firm can access thereafter as often as they want). You can choose to authorize and file your documents now, or you may choose to enter a future date and time for the document to be automatically sent.
5. Click Next to proceed with Filing. The final review page will appear.

Start A Transaction | Saved Transactions | Scheduled Transactions

11/16/17 7:03 PM EST | Case | Documents | Sending Parties | Service | Add'l Recipients | Review & Submit

Review and Submit | Transaction ID: 52479973 | Cancel | Save & Close

**IMPORTANT: Your transaction has not yet been submitted.
When you have finished reviewing, select Submit Transaction below.**

<p>File & ServeXpress Transaction ID: 52479973</p> <p>Submitted by: Adam Attorney, Mock Firm A-Bellevue</p> <p>Authorized by: Adam Attorney, Mock Firm A-Bellevue Edit</p>	
<p>Court: WV Kanawha County Circuit Court</p> <p>Division/Courtroom: N/A</p> <p>Case Class: MLP - Asbestos</p> <p>Case Type: Asbestos Personal Injury 03-C-9600</p>	

Review & Submit Tab Tips:

- ✓ **Read Status:** To access this report after the transaction is completed, go the Transaction Details from anywhere in the application, scroll down to the “Read Status” link, click the link and you will see the report – which is printable. If you did not pre-order the Read Status during the transaction process, you will be prompted with the fee after clicking the Transaction Details.

6. Review the summary information. There will be clickable drop-down sections for Case Names, Case Numbers, Sending Parties and Recipients. Click on the arrows in each text box to review this information.

➔ Multi-Case Case Numbers

➔ Multi-Case Case Names

7. 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.
8. When the information has been verified and you are ready to proceed, click **Submit Transaction**.

Review & Submit Tab Tips:

- ✓ **Note:** When submitting into multiple cases you have the option to expand the case name and number to view the original case name and numbers into which you are submitting the transaction. You may do this by clicking the arrow in **Case Name or Case Number** field.