File & Serve *Xpress* ™

Filing & Serving Documents
User Guide

![File & ServeXpress]

Filing & Serving Documents

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File & ServeXpress - Resources Available

File & ServeXpress
Resources

- **File & ServeXpress 24/7 Client Support** is available to assist you with technical, User ID, functionality, and any other questions you may have. You may reach Client Support at 1-888-529-7587.

- **File & ServeXpress Resource Center** is available within the File & ServeXpress site by clicking on the Resource Center link at the bottom of your screen once logged in to FSX. The Resource Center contains our training registration information, jurisdiction specific rules & 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. Our login page can be found at: https://www.fileandservexpress.com/login

- **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.

Filing & Serving Documents Overview

File & Serve Xpress™

Before You Begin

✓ 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.

✓ Check our minimum system requirements to be sure your computer is correctly configured for using File & ServeXpress.

✓ All tables are sortable. Any time a grid or table appears, click the column headings to sort by that information.

✓ Hyperlinks take you to additional information –don't forget to use them!

✓ When running searches, less is more. Enter only partial information to get the most results.

✓ The fastest way to access a transaction is with the Transaction ID.

✓ 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.
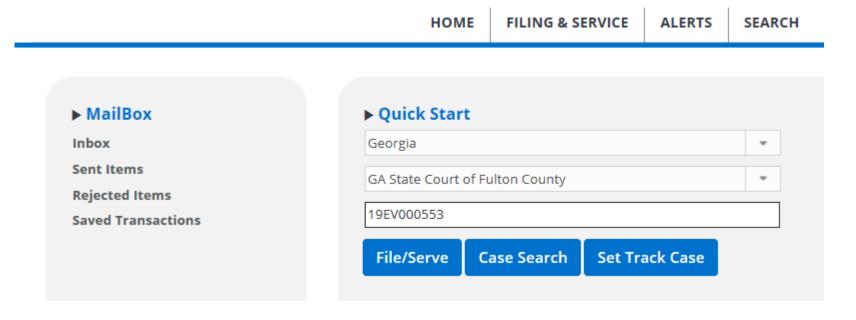
Log in to File & ServeXpress:

- Before using File & ServeXpress, you must have a File & ServeXpress User ID and password. If you do not have these, contact Client Support.

- Open your browser and go to: https://fileandservexpress.com

- Enter your assigned ID and password. Click Sign in.

Quick Start Menu

If you are filing and/or serving into a case where you represent a party, you can use the Quick Start Menu to save steps.

- From the Home Screen, select the state from the drop-down menu under Quick Start. Scroll through the list or start typing the name to see matches.

- Select the Court from the drop-down menu or, start typing the court name to see matches.

- Enter either case name or case number information and click on the case from the search results.

Filing & Service Tab

| HOME | FILING & SERVICE | ALERTS | SEARCH |

Start a Transaction

There are 6 easy steps to submitting documents 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 in which to eFile and/or eServe.

2. **Documents Tab** -Lets you select the type of document you are submitting and attach your documents.

3. **Sending Parties Tab** -Allows you to select the client for which you are submitting the transaction.

4. **Service Tab** -Allows you to select the recipients of the transaction you are submitting.

5. **Additional Recipients Tab** -Lets you send the transaction to recipients not on the service list (i.e. your client or co-counsel).

6. **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.
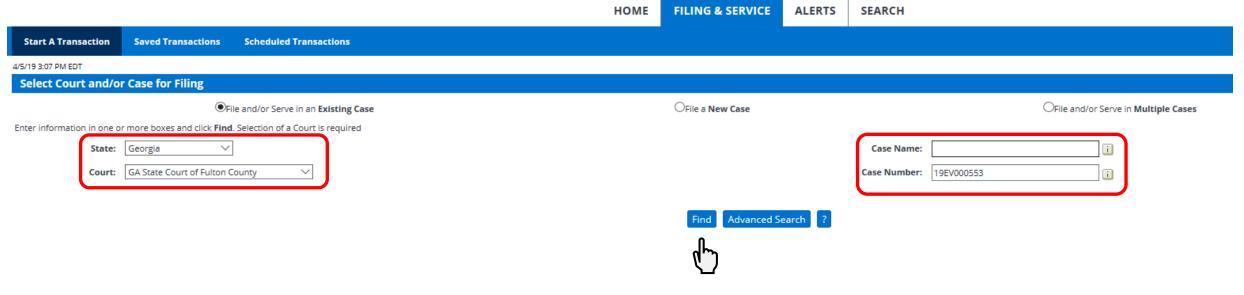
▪ Scheduled Transactions Queue:

Scheduled Transactions

File & ServeXpress allows users to schedule filing submissions 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

File & Serve Xpress™

Start A Transaction Saved Transactions Scheduled Transactions

4/5/19 3:07 PM EDT

Select Court and/or Case for Filing

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

Enter information in one or more boxes and click **Find**. Selection of a Court is required

State: Georgia

Court: GA State Court of Fulton County

Case Name: [   ]

Case Number: 19EV000553

[Find] [Advanced Search] [?]

To eFile and/or eServe into an Existing Case, follow these steps:

- To begin the filing/serving process, click the **Filing & Service** tab.

- File and/or Serve in an existing case (radio button) is already selected. An existing case is one that is already online with File & ServeXpress.

- From the drop-down menu, select the state and court.

- Enter the case number **OR** case name in the fields available and click **Find** (you may use partial names or numbers to search on as well).
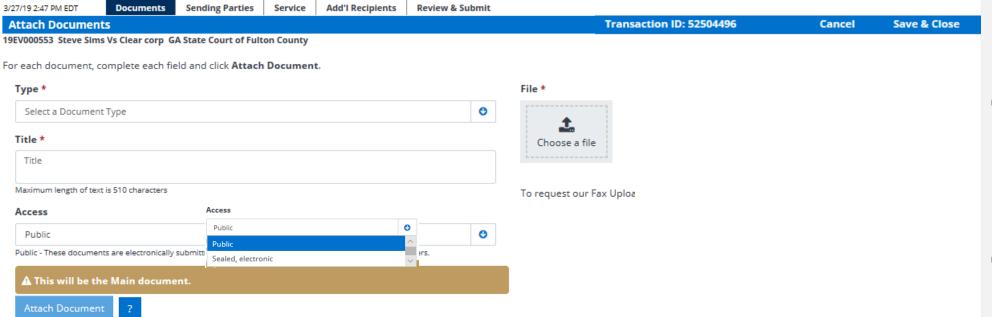
Start a Transaction Continued

- Cases matching your criteria will appear in the Case List results.
- To select the case, click the arrow icon to the left of the desired case number.

Documents Tab

- Select a **Document Type** for your document using the drop-down menu.

- To attach your document, click the **Choose a File** button in the File section. Search your documents or shared drive for the document you wish to upload.

- If you have documents to upload that are not in electronic format, please contact our client support for assistance.

- Enter a title for your document in the **Title field**. The title should comply with local rules for electronic filing.

- Select the **Access** for your filing – access is defined by each court but may include the following on next slide:

Document Tab Tips:

- Transaction ID: This number is the tracking number for your 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.

- Documents uploaded need to be in a Word.doc format with the exception of Exhibits.

Documents Tab Continued

o Public: The document is a publicly filed instrument.

o Sealed: Sealed documents may be handled in one of two ways, depending on how the receiving court has opted to handle sealed instruments:

   a. The sealed document can be attached to the eFiled transaction and only available online to the court and served parties.

   b. The court may require that the documents be filed in hard copy with the court and that a placeholder be eFiled into the electronic docket.

▪ Click **Attach Document**.

Documents Tab Continued

- After you attach your document, you will see that it is in a 'converting' status. You may click on the link that reads, 'Click here to refresh document conversion status'. This will refresh the document conversion. So, for example, if I attach a document in Word format, the system will convert it to a text-searchable .pdf.

- Once the document is converted, you will see the document title. You may click this to view your uploaded document.

Attached Documents List   Click here to refresh document conversion status

ID	Document Type	Access	Conversion Status	Main/ Supporting	Linked To:	Modify	Remove
34889263	Motion	Public	Converting	Main	None Edit Link	Modify	Remove

Document Title: Motion for Continuance

Attached Documents List   Click here to refresh document conversion statu

ID	Document Type	Access	Conversion Status	Main/ Supporting	Linked To:	Modify	Remove
34889263	Motion	Public	Converted	Main	None Edit Link	Modify	Remove

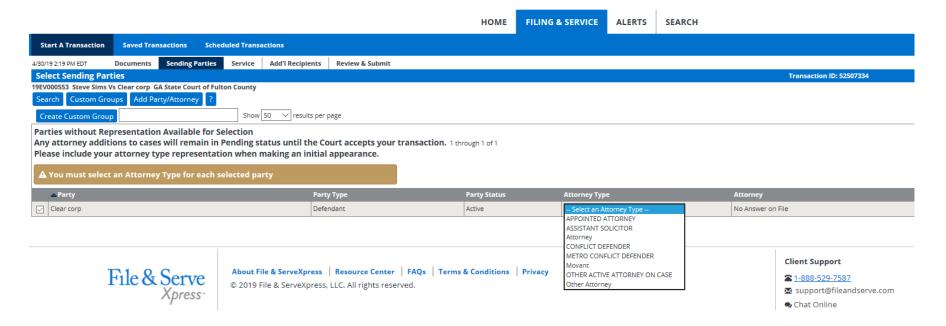**Document Title:** Motion for Continuance
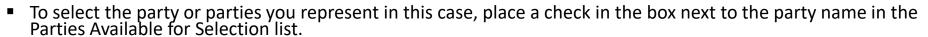
Documents Tab Continued

File & Serve Xpress

- If you have attached multiple documents, you will see under the Main/Supporting column, your Main document and your supporting documents.

- Your Main document will have a document ID associated with it.

- Your supporting document will be "married" to the Main document ID.

- You may use the drop-down menu if you need to change which document is your Main document. To to so, you would select Main in the drop-down menu next to the document that needs to be the Main document.

- To add more documents, repeat the previous document upload steps.

- Click the **Modify** link if you need to make changes to the document uploaded. You will be directed back to the Documents tab to make those changes.

- 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.

Attached Documents List   Click here to refresh document conversion status

ID	Document Type	Access	Conversion Status	Main/ Supporting	Linked To:	Modify	Remove
34889263	Motion	Public	Converted	Main	None Edit Link	Modify	Remove
Document Title: Motion for Continuance							
34889264	Exhibits	Public	Converted	34889263 ⌄	None Edit Link	Modify	Remove
Document Title: Exhibit A							

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Sending Parties Tab

- To select the party or parties you represent in this case, place a check in the box next to the party name in the Parties Available for Selection list.
  - You will need to select an Attorney Type for each selected party.

- You may search for a specific party by searching the available parties. To search the available parties, click **Search.**
  - A series of search fields is available to help you find the party you are looking for.
  - You must place a check in the box by the party name to select that party.
  - Close the search fields by clicking **Close Search.**

- Continue with this process until you have completed the sending parties list.

- You may edit your selections by selecting or deselecting the parties.

- Click the **Service** tab to continue.

Sending Parties Tab Tips:

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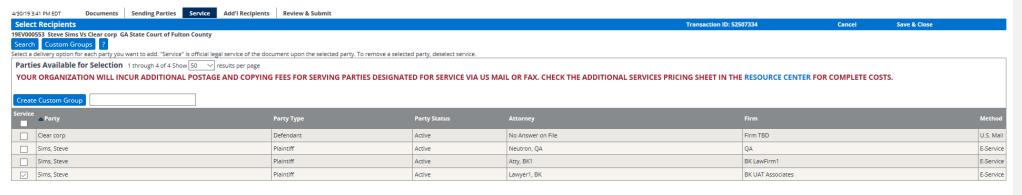- You can save your selection as a Custom Group for future transactions. After selecting your parties, type the name of your group in the space provided, then click Create Custom Group.

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

Select Recipients   Transaction ID: 52507334   Cancel   Save & Close

19EV000553 Steve Sims Vs Clear corp GA State Court of Fulton County

Search   Custom Groups   ?

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

Parties Available for Selection 1 through 4 of 4 Show 50 ▾ results per page

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

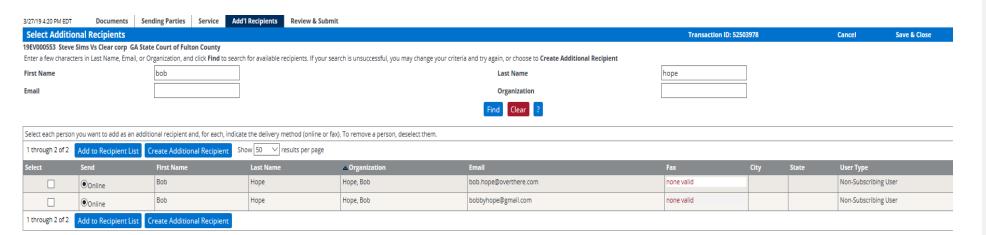| Service ☐	▲ Party	Party Type	Party Status	Attorney	Firm	Method
☐	Clear corp	Defendant	Active	No Answer on File	Firm TBD	U.S. Mail
☐	Sims, Steve	Plaintiff	Active	Neutron, QA	QA	E-Service
☐	Sims, Steve	Plaintiff	Active	Atty, BK1	BK LawFirm1	E-Service
☑	Sims, Steve	Plaintiff	Active	Lawyer1, BK	BK UAT Associates	E-Service

- To select a party/parties to receive Service (a copy of the document(s) you are transmitting), place a check in the corresponding box in the Service column next to the party name(s).

- To select all parties, click the box below service on the gray header bar. This will automatically select all parties on the service list.

- 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 and will have to send service to that party via traditional means.

- The method of delivery File & ServeXpress will use to deliver your documents is listed under the Method column.
  - If the designated recipient is a registered user of File & ServeXpress, then the notification of service will be sent to their File & ServeXpress Inbox.
  - If the designated recipient is not a registered user, then the documents will be delivered via US Mail.

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 party by typing in a U.S. Mail delivery address. You will be prompted to enter an address for each Pro Se party you select to serve via regular U.S. Mail and is not guaranteed if the information you provide is not accurate.

- 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.

- You can opt to share this address with other eFilers, 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.

Additional Recipients Tab

Additional Recipients Tab Tips:

- This is not a required tab and can be skipped if desired.

- Newly added recipients will receive emails with instructions as to how to retrieve the documents and, they will be provided with a login/password for the sole purpose of retrieving those documents.
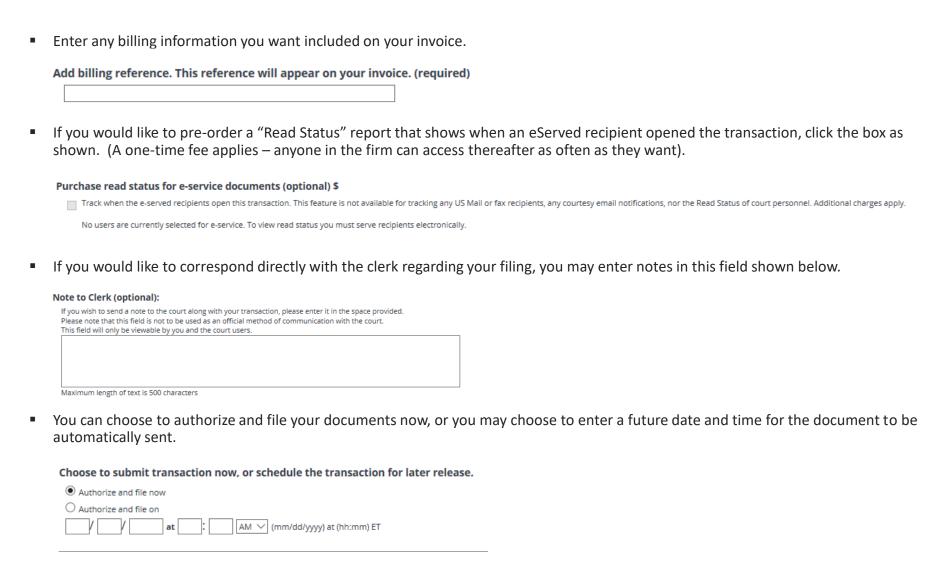
- The system requires a user to initially "search" for an additional recipient before being given the option to create a new additional recipient.

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

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

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

- After entering a new Additional Recipient, the system will then create a nonmember "account" for the additional recipient.

- 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

4/30/19 3:45 PM EDT   **Documents** | **Sending Parties** | **Service** | **Add'l Recipients** | **Review & Submit**

Authorize Transaction

19EV000553 Steve Sims Vs Clear corp GA State Court of Fulton County

Select an attorney to authorize this transaction.

Authorizing Attorney: Lawyer, Lucy

Delivery Options: What do you want to do with this transaction? (pick one)

◉ File with the court and Serve selected parties
  (A document you are filing will be routed to Judge Review and must be sent to the court)

○ Serve Only - Private (available only to sending firm and served firms)

○ Serve Only - Public (available to anyone to purchase from File & ServeXpress, except in e-service only jurisdictions and subject to case security policies).

- Select an **authorizing attorney** from your office in the drop-down list.
- Select a **delivery method** from the available options.
  - **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 & ServeXpress 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.

Review & Submit Continued

- Enter any billing information you want included on your invoice.

Add billing reference. This reference will appear on your invoice. (required)

[   ]

- If you would like to pre-order a "Read Status" report that shows when an eServed recipient opened the transaction, click the box as shown. (A one-time fee applies – anyone in the firm can access thereafter as often as they want).

Purchase read status for e-service documents (optional) $

☐ Track when the e-served recipients open this transaction. This feature is not available for tracking any US Mail or fax recipients, any courtesy email notifications, nor the Read Status of court personnel. Additional charges apply.

No users are currently selected for e-service. To view read status you must serve recipients electronically.

- If you would like to correspond directly with the clerk regarding your filing, you may enter notes in this field shown below.

Note to Clerk (optional):

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.

[   ]

Maximum length of text is 500 characters

- 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.

Choose to submit transaction now, or schedule the transaction for later release.

◉ Authorize and file now
○ Authorize and file on
[ ] / [ ] / [ ] at [ ] : [ ] [AM ▾] (mm/dd/yyyy) at (hh:mm) ET

- **Next** Click Next to proceed with reviewing your filing details before submitting.

Review & Submit Tab Tips:

Read Status:

- To access the Read Status 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 report during the transaction process, you will be prompted with the fee after clicking the Transaction Details.

Review & Submit Tab Continued

File & Serve Xpress

- Review the summary information.

- 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.

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

Transcription Receipt/Report

File & Serve Xpress

Transaction Receipt/Report Tips:

Sample Transaction Report:
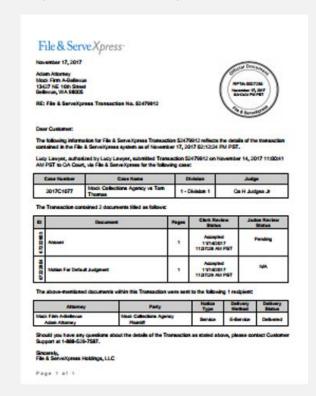

- Once you click the Submit tab, the page will refresh and you will see a Transaction Receipt. You may print this receipt off for your records or search for it on File & ServeXpress by Transaction ID in the future.

- 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".

File & ServeXpress – Contact Us/Resources

- **File & ServeXpress 24/7 Client Support**
  - Call 1-888-529-7587
  - Chat with us!
  - info@fileandserve.com
  - support@fileandserve.com

- **File & ServeXpress Resource Center**
  - For training registration information, jurisdiction specific rule & procedures, user guides, best practices, pricing and much more!
  - Once logged in to FSX, you will find the link to our Resource Center at the bottom of the screen.

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