File & Serve Xpress™

New Case Filing
User Guide

File & Serve Xpress

New Case Filing

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File & ServeXpress - Resources Available

- **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. You may reach our login page 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.
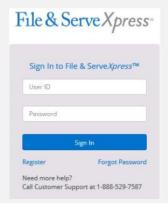
File & ServeXpress

Resources

New Case Filing Overview

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 a 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 an ID and Password. If you do not have these, contact your firm administrator or FSX Client Support.

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

▪ Enter your assigned ID and Password and click Sign in.

Filing & Service

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Start a Transaction

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:

- **Start A Transaction Queue** - Allows you to select a case to eFile and/or eServe into.

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

- **Case Parties Tab** - Allows you to select parties named in the case.

- **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.

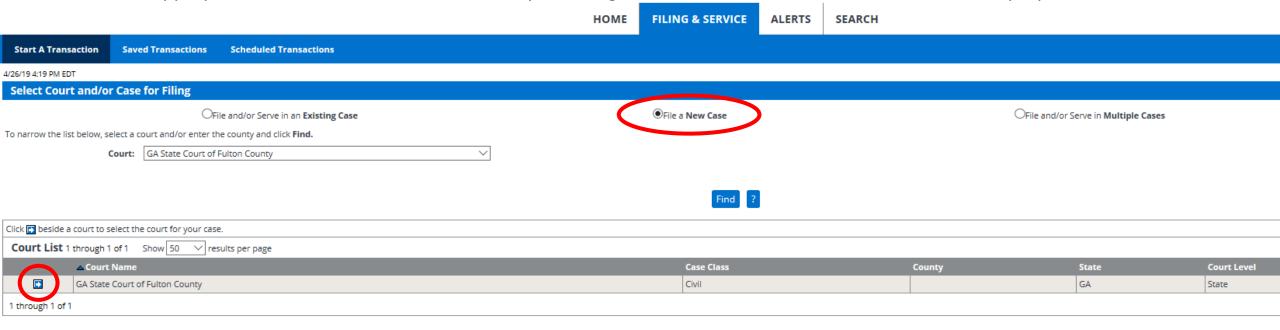### Scheduled Transactions Queue:

Scheduled Transactions

- File & ServeXpress allows users to schedule 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.

eFiling a New Case

Follow these steps:

- Select File a New Case radio button.
- Select the appropriate Court using the drop-down menu.
- Click Find.
- Select the appropriate case class from the Court List by selecting the box with a white arrow to the left of the proper case class.

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| **Start A Transaction** | Saved Transactions | Scheduled Transactions |

4/26/19 4:19 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**

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

Court: [GA State Court of Fulton County   ▼]

[Find] [?]

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

Court List 1 through 1 of 1   Show [50 ▼] results per page

	▲ Court Name	Case Class	County	State	Court Level
🔳	GA State Court of Fulton County	Civil		GA	State

1 through 1 of 1

Tips for eFiling a New Case:

- **Note:** A new case is a case that does not have a case number assigned by a court clerk.

- **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.
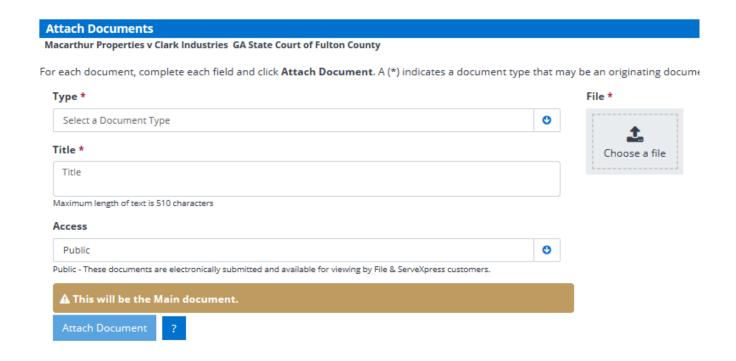
eFiling A New Case Continued

Add New Case

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

Court GA State Court of Fulton County

Case Class

Civil

Case Type

Please select a Case Type

Case Name

(First Plaintiff vs First Defendant)

Maximum length of text is 200 characters

Submit   ?

- Select the appropriate **Case Type** from the drop down list.
- Enter the **Case Name** using the naming convention: Last name, First Name vs Defendant.
- Click **Submit.**

Documents Tab

Attach Documents

Macarthur Properties v Clark Industries GA State Court of Fulton County

For each document, complete each field and click **Attach Document**. A (*) indicates a document type that may be an originating docume

Type *

Select a Document Type

File *

⬆ Choose a file

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.

⚠ **This will be the Main document.**

Attach Document   ?

- 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 documents or shared drive for the document you wish to attach.
  - Choose the appropriate **Access level** (e.g. Public, Sealed)
  - Enter the **Title** of the document.
  - Click **Attach Document**.

Documents Tab Tips:

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

- New Case Filings must include the Complaint, Summons, and Case Civil Filing form. If service is requested, please submit a Marshall's Entry Service form.

- A Complaint, Summons, and Case Civil Filing form can be filed at the same time using separate filing codes with the same envelope.

- If you need to file a leave of absence, once you receive your case number, you will be able to file into the existing case. If cannot be filed with the initial filing.

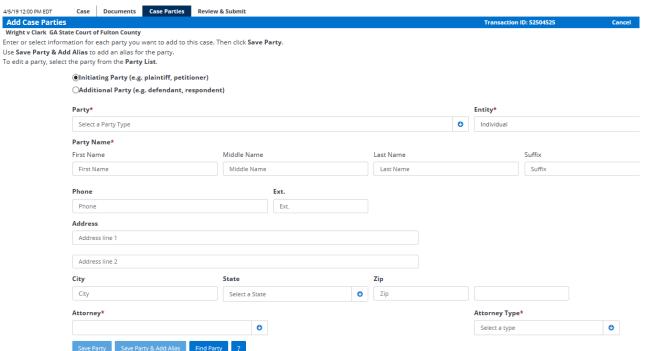- All parties must be listed when filing a new case.

Documents Tab Continued

- 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
⦿	34889255	COMPLAINT ** Remove	Public	**Converting**	Main	None Edit Link	Modify	Remove

Document Title: Complaint

Initiating Document	ID	Document Type	Access	Conversion Status	Main/ Supporting	Linked To:	Modify	Remove
⦿	34889255	COMPLAINT **	Public	Converted	Main	None Edit Link	Modify	Remove

Document Title: Complaint

Case Parties

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Case Parties Tab Tips:

- **IP and AP:** IP is the initiating party and AP is the additional party.

- **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.

- **When adding a new party:**
    - Do not include "The" in company names.
    - Use "&" instead of the word "and".
    - Avoid punctuation in company names
    - Always abbreviate Inc., Corp., Co.
    - If you want to add aliases (dba's and aka's), add them as separate parties.
    - 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.

- The **Case Parties** tab is where users will enter case party information.
    - Choose the **Initiating Party (IP)** radio button.
    - Choose the correct **Party and Entity** type using the drop-down menus.
    - Enter **Initiating Party** information in the open fields.
    - Select the **Attorney and Attorney Type** using the drop-down menus.
    - Click **Save Party.**
    - Repeat this process for all parties you represent.

- To add **Additional Parties**:
    - Click the **Additional Party (AP)** radio button.
    - Choose the correct **Party and Entity** type using the drop-down menus.
    - Enter **Additional Party** information.
    - Click **Save Party.**
    - Follow the same process above to continue to add parties if needed.

Review & Submit Tab

Review & Submit Tab Tips:

- Delivery Options – this field is intentionally blank as items are automatically sent to the court.

- Billing Reference: This is an internal function and will only be seen by the filing party.
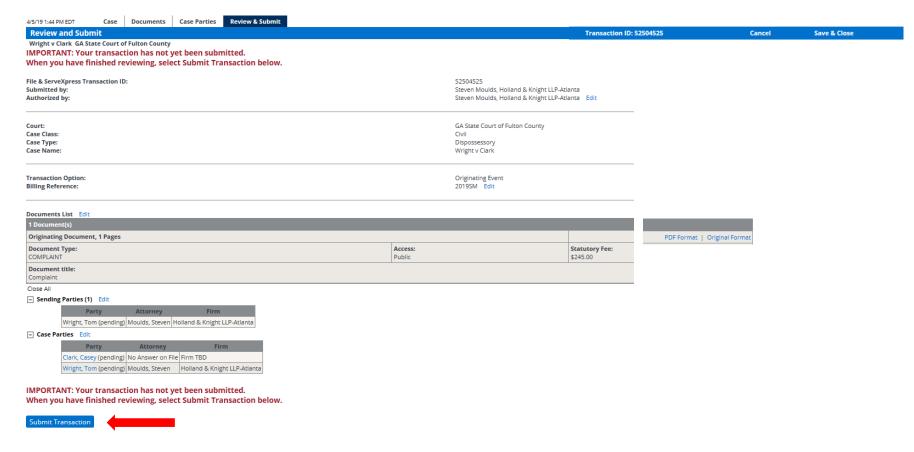
- **Saved Transactions Queue:**

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- **Scheduled Transactions Queue:**

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Review & Submit Continued

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.

- 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.**

- A transaction Receipt appears containing your date and time of filing "stamp", print a copy for your records.

Transaction Receipt / Report

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 & 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".

File & ServeXpress Resources

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.

- **File & ServeXpress Login Page**
  - ❑ For password help, what's new, and any important information like scheduled maintenance or system changes.
  - ❑ https://www.fileandservexpress.com/login/