

**File & Serve***Xpress*  
E-Service: Hawaii State Tax Appeal Court

# File & Serve<sup>Xpress</sup>

## E-Service Hawaii State Tax Appeal Court

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## Important Contact Information

File & ServeXpress 24/7 Customer Support  
1-888-529-7587

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Client Relations Manager  
719-963-5945  
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**Notes:**

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## Agenda

- *File & ServeXpress*
- *E-Service Requirements*
- *Send Documents – Filing & Service, Sent Items, Read Status*
- *Receive Documents - Inbox and Notification Options*
- *Quickly Access Case Activity – Tracked Items*
- *Maintaining Service Lists – Case & Party Management*
- *How to Initiate E-service in your firm's Cases*

## This Class Is Recommended For:

- ✓ New law firm users with no experience or limited experience with basic *File & Serve* functionality.
- ✓ Any experienced law firm users who would like to learn more about basic functionality of *File & Serve* tools like the Inbox, *File & Serve* Preferences, or the E-Service functionality.
- ✓ Any law firm users who have not used the *File & Serve* system for extended periods of time and need to sharpen their E-Service skills.



## Why File & ServeXpress?

- Streamlined delivery of pleadings *and discovery* to all parties through a secure website.
- On-line service receipt.
- Significant cost savings - \$21 per transaction, +\$2 for multiple cases, \$21 to serve documents in Master Case.
- Searchable real time on-line case files.
- All documents, including non-filed documents (discovery and correspondence), are available from anywhere you have internet access.
- Easy, Efficient, and Environmentally Friendly!

Notes:

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## E-Service Requirements

- See Applicable E-service Stipulation, regarding File & Serve*Xpress* for electronic service.
- All attorneys on the service list must have a File & Serve ID.
- Word, WordPerfect, PDF or TIFF files accepted.
- Typographical signatures accepted - /s/ Attorney Name.
- Service deadline – 11:59 p.m.

## File & Serve Home Page

Notes:

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The screenshot shows the File & Serve Home Page interface. At the top, there is a navigation bar with tabs for Home, Filing & Service, Alerts, and Search. Below this, there is a section titled "Customize My Home Area" with several widgets:

- Current Activity:** A widget with a red box around it containing links for [Inbox](#), [Sent Items](#), and [Rejected Items](#) (with the subtext "You have unread items").
- Monitoring Tools:** A widget with a red box around it containing links for [Alerts](#) (with the subtext "Receive notifications of new Filing and Service activity that match your search criteria.") and [Tracked Items](#) (with the subtext "Tracked items provides an 'at-a-glance' view of cases & case groups. Click [here](#) to add or edit your tracked items.").
- Quick Find:** A search widget with a "Transaction ID" field containing "09680618" and a "Go" button.
- Quick Case:** A search widget with "Case Name" and "Case Number" fields, the latter containing "0008cv2068" and a "Go" button.
- File & Serve Notices:** A widget with a link for [File & Serve Notices](#).
- Calendar:** A widget with the subtext "View calendar events or schedule new calendar events."
- Message Board:** A widget with the subtext "View messages or post new messages."
- My Attorneys:** A widget with the subtext "Open an 'at-a-glance' view of cases involving attorneys in your firm."
- Toolbox:** A widget with a red box around it containing a link for [Case & Party Management](#) and several other links: [Add Payments](#), [Attorneys/Users in Firm](#), [People Search](#), [Billing Information](#), [View Submitted SOP Orders](#), [Requests to Add Party/Attorney](#), and [Custom Document Lists](#).

## E-Service Quick Reference Guide



1. Select **State** (Hawaii) & **Court** (HI State Tax Appeal Court).
2. Enter a portion of the **case name** or **case number**.
3. Click **Find**.
4. Select your case from the **Case List**.

## Documents Tab



1. Select **Document Type**.
2. Click **Browse**.
3. Select the Word, Word Perfect or PDF document to be served.
4. Choose the **Access Type**.
5. Enter a complete title.
6. Click **Attach Document**.
7. Repeat steps 1-6 for additional documents.

## Specific Tips/Reminders for HI State Tax Appeal Participants:

- ✓ Remember to read the Stipulation Regarding Filing and Service Protocols that has been served into the master case and all case parties on the service list.
- ✓ You should e-serve the documents into the specific case.
- ✓ To submit documents into more than one case, click "**File/Serve into Multiple Cases**" and place a check-mark beside each case.



- ✓ Access Type: If you want to keep documents private (i.e. medical records) so only certain firms can access them, choose "**Sealed, electronic**" from the Access Type drop-down menu. This feature will allow you to send documents electronically but restrict access to the public or others parties who should not have access.





## 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
24050654	Motion	Public	Converted	Main	None <a href="#">Edit Link</a>	<a href="#">Modify</a>	<a href="#">Remove</a>
<b>Document Title:</b> <a href="#">Motion for Chinese Drywall Litigation</a>							
24050667	Exhibits	Public	<a href="#">Converting</a>	24050654 ▼	None <a href="#">Edit Link</a>	<a href="#">Modify</a>	<a href="#">Remove</a>
<b>Document Title:</b> Exhibits for Chinese Drywall							

1. Click each **Document Title** to view newly created PDF documents.
2. Click **Modify** to make changes to any document.
3. When all documents are attached, click **Sending Parties** tab.
4. The **Modify** link will take the user one step back to modify the document information.

## Sending Parties Tab

6/11/08 5:03 PM PDT

Documents

**Sending Parties**

Service

Add'l Recipients

Review

Select Sending Parties

1. Select your parties. This tab allows you to select the parties your firm represents.
2. Click **Service** tab.

## Documents Tab Tips:

- ✓ Staple” documents together using the “**Main/Supporting feature**”.
- ✓ Document linking is not required, however, to link your documents to previously submitted documents (i.e. a Response to a Motion), click “**Edit Link**” and select the document in which you are responding to and click done.
- ✓ Modify will allow you to upload a different document, change the access type or change the document title.



## Sending Parties Tab Tips:

- ✓ If your party/firm/attorney is not listed on the tab, then:
  - Call Customer Support at 1.888.529.7587
  - Or, select “**Add Attorney/Party**” which will walk you through the steps of adding your party/firm/attorney.
  - Or, from the Home tab, select “**Case and Party Management**” then follow the steps to add your party/firm/attorney.

## Service Tab



1. Make sure **E-service Only** is selected.
2. Click **Additional Recipients** tab (optional) or click the **Review & Submit** tab.

## Additional Recipients Tab (Optional)



1. Click **Write in Recipients**.
2. Enter **Recipient name** and **Email address**.
3. Click **Save**.  
*Note: This is not a blind carbon copy. The recipient's name will appear in the details of the transaction.*
4. Click **Review & Submit** tab.

### Service Tab Tips:

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- ✓ All registered parties are automatically pre-selected to be served. You may deselect parties if the document you are e-serving should not go to all parties. If a party is missing, contact Customer Support at 1.888.529.7587
- ✓ You may skip this tab if you are not going to modify the pre-selected list.

### Additional Recipients Tab Tips:

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- ✓ With **Additional Recipients**, you can send copies of the transaction to clients, other members of your firm or other firms. **NOTE:** All users will be able to see the recipient's name but not the email address.

## Review & Submit Tab

6/11/08 5:07 PM PDT

Documents

Sending Parties

Service

Add'l Recipients

Review &amp; Submit

Authorize Transaction

1. Select **Authorizing Attorney**.
2. Select **Serve Only - Public** or **Serve Only - Private**.  
*Note: Serve Only Private transactions can be viewed only by firms selected on the Service tab. Firms who enter your case at a later date are not able to view Serve Only Private transactions or see the transactions listed in a Case History Report.*
3. Enter **Billing Reference**.
4. Select **Read Status** (optional).  
*Note: If Read Status is not selected, it may be accessed in the future while reviewing the details of a transaction.*
5. Select **Authorize and file now** or enter a later date and time for submission.
6. Click **Next**.
7. Review your selections.
8. Click **Submit**.
9. Print e-service Transaction Receipt.

### File & Serve Review & Submit Tips:

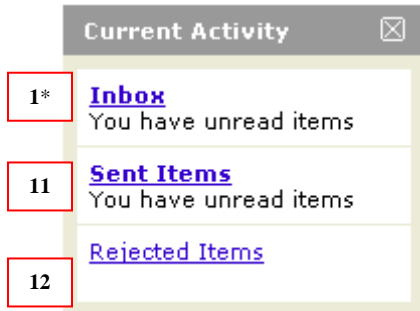
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- ✓ **Read Status Reports** are available for \$2.00 per transaction. This feature will reveal the date and time the e-served recipient read the transaction.
- ✓ See Appendix a for a screen shot of the Transaction Receipt.

### Notes:

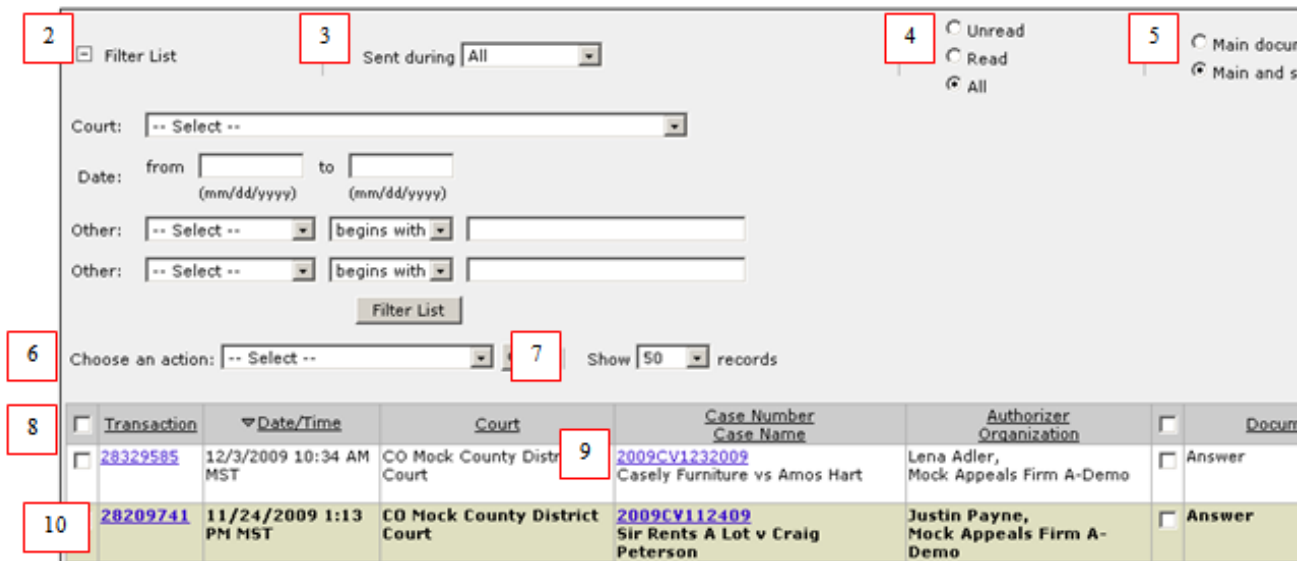
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## The File & Serve Current Activity Box/Area of Official Service



*\*Note: When you have unviewed items in any of your current activity mailboxes, they will become bold and the message, "You have unread items" will appear as shown in the screenshot.*

8. Click the **Inbox** link.



View of the Inbox

### The Area of Official Service:

- ✓ The File & Serve "Inbox" is the **Area of Official Service**.
- ✓ File & ServeXpress only guarantees service to the "Inbox" and any other notifications (Including Emails) are strictly complimentary.
- ✓ File & ServeXpress recommends that users check their "Inbox" on a regular basis to ensure that they are viewing all of their service items.



9. **Filter List** offers options for querying your Inbox. Click the **Filter List** button to view your list after entering your search criteria.
10. **Sent During** allows the user to choose from as little as the last 7 days to all records in the Inbox.
11. **Unread, Read, and All** radio buttons allow the user to choose which Inbox items to view.
12. **Main Documents Only** and **Main and Supporting Documents** radio buttons filter out documents.
13. **Choose an Action** gives the user options including downloading, printing, and purchasing documents.
14. **Show (#) Records** lets the user determine how many transactions to show on each page.
15. All of the columns are sortable by the column title/header (i.e. **Transaction, Date/Time, and Court**).
16. Click on the **Case Number** (e.g. 2009CV1232009) hyperlink to see the case jacket information.
17. Click on the **Transaction Identification Number (TID)**, (e.g. 28209741) to view the status of the transaction including all clerk review processes.
18. The functionality of **Sent Items** is exactly the same as the Inbox. However, **Sent Items** only keeps the sent history for 21 days. After 21 days, the transactions must be found using the **Search** function.
19. The functionality of **Rejected Items** works the same as the Inbox.

## Inbox, Sent Items, & Rejected Items Tips:

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- ✓ **Show (#) of Records:** If you are attempting to use the “Find” feature (ctrl F), we suggest that you choose to show a number of records that is larger than the number of transactions that are in your inbox to put as many searchable records as possible on page one.
- ✓ **TID:** The transaction identification number is a “tracking” number that is unique to each transaction and is used to easily search and identify that transaction.
- ✓ **Filter Suggestions:** When using the filter function, we suggest that you do not use the filter “begins with” as this is a very specific search and will only return exact matches. We suggest using the filter selection “contains”, which will return partial matches.
- ✓ **Sent Items:** When users are unsure if a transaction has been submitted to the court, we suggest that they look in their Sent Items queue. If the transaction is showing in Sent Items, it has been submitted to the court.
- ✓ **Rejected Items:** Use the TID link in rejected items to view the “Document History”, which allows the user to see such information as the name of the clerk who reviewed the transaction and the reason why it was rejected.

## File & Serve Preferences Area



1. The **My Information** link allows the user to modify his/her user information and Bar number.
2. **My Organization** is used to view the organization information and identify the organization administrator.
3. **My ID and Password** allows users to modify/update their user names & passwords, and set up their security questions for access to the system when using the "forgot password" link from the homepage.
4. The **My Notification Options** link allows users to set up how they would like to receive their complimentary emails from *File & Serve* and choose who should receive their Inbox items.

5. The links in **My Organization Profile** are only used by organization administrators.

### File & Serve Preferences Tips:

- ✓ **My Information:** We suggest that users keep their user information up-to-date to ensure that Customer Service can contact them directly and that their complimentary e-mail notifications are going to the correct address.
- ✓ **My Notification Options (email):** *File & Serve* provides complimentary emails solely as a convenience for our customers. We cannot and do not guarantee receipt of these items. Reminder: The Inbox is the Area of Official Service as designated by the Court.
- ✓ **My Notification Options (email):** We suggest that users use the option "Send email without documents attached" to help avoid the email being bounced for being too large. An email with a link to the document will be sent.
- ✓ **My Notification Options (Forward Notifications):** Attorneys should use this option to select members of the firm who should receive their Inbox items.
- ✓ **My Notification Options (Receive Notifications):** Support staff should use this option to select attorneys whose Inbox's they should be viewing.



## Tracked Items

[Home](#) | [Filing & Service](#) | [Alerts](#) | [Search](#)

[Home](#) > [Tracked Cases & Groups](#)

Tracked Cases & Groups (22) [Tracking Setup](#) | Show 50 records

1-22 of 22 item(s)

Case Name Or Case Group Name	▲ Case Number	Court	Case History	Inbox	Rejected Documents	
Casley Furniture vs Amos Hart	<a href="#">2009C010509</a>	Colorado Mock County Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Casey Fine Motors vs. Walter Hughes	<a href="#">2008CV1609</a>	Colorado Mock District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Melissa Miller vs. Pine Tree HOA	<a href="#">2009CV12209</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Casley Furniture vs Amos Hart	<a href="#">2009CV21109</a>	Colorado Mock District Court	<a href="#">View</a>	<a href="#">View</a>		<a href="#">File &amp; Serve</a>
Highway Reparation vs Hughs, Millicent	<a href="#">2009CV1266</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Casely Furniture vs Amos Hart	<a href="#">2009CV3122009</a>	CO Mock District Court (Court Demo Only)	<a href="#">View</a>	<a href="#">View</a>		<a href="#">File &amp; Serve</a>
Corey Divine vs Matthew Higgins	<a href="#">2009CV31809</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Secure Lock & Safe vs Harold Houdini	<a href="#">2009CV4162009</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Tim Taylor vs Home Depot	<a href="#">2009CV416091</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Casley Furniture vs Amos Hart	<a href="#">2009CV5012009</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Fred Casley vs Quincy Magoo	<a href="#">2009CV50609</a>	CO Mock County District Court	<a href="#">View</a>	<a href="#">View</a>		<a href="#">File &amp; Serve</a>

### Tracked Items Tips:

- ✓ **Functions:** automated case management tool that provides an alphabetic “File Cabinet” view of your cases with hyperlinks to save time when e-filing, e-serving, and accessing case information.
- ✓ **Pricing:** Tracked Items is a complimentary case management tool provided to Users by File & Serve*Xpress*.

### Notes:

## Tracked Items Setup

Home Filing & Service Alerts Search

Home > Tracked Cases & Groups

Tracked Cases & Groups (22) [Tracking Setup](#) Show 50 records

1-22 of 22 item(s)

Case Name Or Case Group Name	Case Number	Court	Case History	Inbox	Rejected Documents	
Casley Furniture vs Amos Hart	<a href="#">2009C010509</a>	Colorado Mock County Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Casey Fine Motors vs. Walter Hughes	<a href="#">2008CV1609</a>	Colorado Mock District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Melissa Miller vs. Pine Tree HOA	<a href="#">2009CV12209</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Casley Furniture vs Amos Hart	<a href="#">2009CV21109</a>	Colorado Mock District Court	<a href="#">View</a>	<a href="#">View</a>		<a href="#">File &amp; Serve</a>
Highway Reparation vs Hughs, Millicent	<a href="#">2009CV1266</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Casely Furniture vs Amos Hart	<a href="#">2009CV3122009</a>	CO Mock District Court (Court Demo Only)	<a href="#">View</a>	<a href="#">View</a>		<a href="#">File &amp; Serve</a>
Corey Divine vs Matthew Higgins	<a href="#">2009CV31809</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Secure Lock & Safe vs Harold Houdini	<a href="#">2009CV4162009</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Tim Taylor vs Home Depot	<a href="#">2009CV416091</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Casley Furniture vs Amos Hart	<a href="#">2009CV5012009</a>	CO Mock County District Court	<a href="#">View</a>			<a href="#">File &amp; Serve</a>
Fred Casley vs Quincy Magoo	<a href="#">2009CV50609</a>	CO Mock County District Court	<a href="#">View</a>	<a href="#">View</a>		<a href="#">File &amp; Serve</a>

### Tracked Items Setup Tips:

#### ✓ Tracked Items Setup:

- Click “Tracking Setup” Hyperlink to begin set up
- Find your case by searching by jurisdiction
- Choose the correct case and click the “Add Tracked Item(s)” button.

#### ✓ Tracked Items Functionality:

- Column headers are sort-able
- Case number link to case jacket information
- Case History “View” link to docket
- Inbox “View” link to new service
- Rejected Items “View” link to rejected items

### Notes:



## Maintaining Service Lists

### Maintaining Service Lists

- Case and Party Management Link
- Any plaintiff or defendant may use this feature to add or change their party or attorney
- Document verifying the change must be attached

## How to Initiate Service in Other Cases

### How to Initiate E-Service in Other Cases

- ✓ Consider the cost benefit of e-service in your own cases.
- ✓ Complex, toxic tort, construction defect and pharmaceutical are common case types.
- ✓ Submit an e-service motion or stipulation to the court.
- ✓ Return CMO along with service list to LexisNexis File & Serve.
- ✓ LexisNexis File & Serve adds case information within days.

# Appendix A: Transaction Receipt (Sample)

Page 1 of 8

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**Transaction ID:** 39998674  
**Submitted by:** LexisNexis Service, LexisNexis Service  
**Authorized by:** LexisNexis Service, LexisNexis Service  
**Authorize and file on:** Sep 23 2011 3:21PM EDT

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**Court:** HI State Tax Appeal Court E-Service  
**Division/Courtroom:** N/A  
**Case Class:** Civil-Travelocity.com Tax Appeal  
**Case Type:** Tax Appeal  
**Case Number:** MC - Master Case  
**Case Name:** Tax Appeal Master Case

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**Transaction Option:** Serve Only - Public  
**Billing Reference:**  
**Read Status for e-service:** Not Purchased

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**Documents List**  
**1 Document(s)**  
**Attached Document, 11 Pages Document ID: 51366857** [PDF Format](#) | [Original Format](#)  
**Document Type:** Order **Access:** Secure Public **Statutory Fee:** \$0.00 **Linked:**  
**Document title:** Stipulation Regarding Filing And Service Protocols  
[Close All](#)  
 **Sending Parties (1)**

Party	Party Type	Attorney	Firm	Attorney Type
LexisNexis Service	Interested Party	Service, LexisNexis	LexisNexis	Attorney in Charge

**Recipients (14)**  
 **Service List (14)**

Delivery Option	Party	Party Type	Attorney	Firm	Method
Service	Expedia Inc	Interested Party	Jim Karen	Jones Day-Dallas	E-Service
Service	Expedia Inc	Interested Party	Paul Alston	Alston Hunt Floyd & Ing	E-Service
Service	Expedia Inc	Interested Party	Tina L Colman	Alston Hunt Floyd & Ing	E-Service
Service	Expedia Inc	Interested Party	Brian Hershman	Jones Day-Dallas	E-Service
Service	Expedia Inc	Interested Party	Ronald Heller Esq	Torkildson Katz	E-Service
Service	Expedia Inc	Interested Party	Adam Lang Esq	Torkildson Katz	E-Service
Service	Expedia Inc	Interested Party	Pamela W Bunn Esq	Alston Hunt Floyd & Ing	E-Service
Service	Hotelscom GP LLC	Interested Party	Jim Karen	Jones Day-Dallas	E-Service
Service	Hotelscom GP LLC	Interested Party	Paul Alston	Alston Hunt Floyd & Ing	E-Service
Service	Hotelscom GP LLC	Interested Party	Tina L Colman	Alston Hunt Floyd & Ing	E-Service
Service	Hotelscom GP LLC	Interested	Brian Hershman	Jones Day-Dallas	E-

<https://w3.fileandserve.lexisnexis.com/WebServer/WebPages/FileAndServe/prcReviewSu...> 9/23/2011

## Appendix B: Helpful Tips

Searching for HI Tax Appeal Cases on File & Serve:

*There is no cost to utilize the searching features on File & Serve within this litigation as long as your firm represents a party.*

- *The **Case History** search will allow you to see all File & Serve transactions within a specific case.*
- ***Cases Search** will allow you to search for a case by firm, attorney, party or case name or number.*
- ***Daily Docket** will allow you to see (in real time) all transactions submitted in the litigation on a particular day.*
- ***Advanced Search** will allow you to search by document types and titles as well as by the authorizing firm or attorney.*

Use Alerts as a Safety Net (cost: \$20.00 per Alert, per month):

- ***Alerts** can be set up to track activity in cases that are of interest to you. You can set up an Alert to monitor all activity in cases or you may set up an Alert to be notified when certain documents are e-served.*
  - *Tip for defense firms: because defendants are on the service list in every case, Alerts allow you to receive notifications regarding specific cases of interest for the party you represent.*

Track Items that you want fast access to:

- ***Tracked Items** is a monitoring tool within File & Serve that allows you to create an at-a-glance view of cases of interest. You have the ability to set up your tracked items according to your specificity. For example, you can choose to see the case name, court name and any items in your inbox or sent items.*

Create Custom Case Groups if you simultaneously serve into the same multiple cases often or if you want to report on the same group of cases often:

- ***Custom Case Groups** are setup on the Filing & Service tab when you choose to e-serve into multiple cases. Custom groups can be used when e-serving, searching or creating Alerts.*

## Appendix C: Additional Resources

- [Resource Center](#): The place to visit for Rules and Procedures, Training Options, Support Center/Guides, Important Notices and more! The Resource Center is available once logged onto File & Serve.
- 24/7 Client Support – 888.529.7587