



File & ServeXpress

Filing and Serving Documents
TexFile Courts
User Guide

File & ServeXpress[™]

File & ServeXpress

Filing and Serving Documents (Subsequent Filing)

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File & Serve Resources

File & ServeXpress (“FSX”) 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 FSX by clicking on the Resource Center link at the top, right-hand side of your screen. The Resource Center contains our training registration information, jurisdiction specific rules & procedures, user guides, pricing and much more!
- **File & ServeXpress Login Page** www.fileandservexpress.com is where you can find password help, and where you log in.
- **File & ServeXpress Notices** is an information page that is available on the bottom, left-hand side of the FSX Home tab, once you sign into FSX. 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.
- **TexFile specific updates:** Information on how to register for FSX, how to link your account to TexFile, training information, court transition dates, mandatory dates, etc. please visit this page: <http://info.fileandservexpress.com/txmandatecountytransitionschedule>.

Filing and Serving Documents Overview (Subsequent Documents)

The FSX Quick Guide provides a convenient source of information to help you efficiently E-file your documents.

Before You Begin

1. Refer to the appropriate court rules on electronic filing prior to using FSX to ensure you are in compliance with local requirements. Copies of any pertinent 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 FSX.
3. **Link your FSX firm and users to TexFile** via FSX Preferences. See the linking user guide in the Resource Center/Texas Rules for detailed instructions.
4. All tables are sortable. Any time a grid or table appears, click the column headings to sort by that information.
5. Hyperlinks take you to additional information – don't forget to use them!
6. When running searches, less is more. Enter only partial information to get the most results.
7. The fastest way to access a transaction is with a Transaction ID.
8. When using FSX 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:

Sign In to File & ServeXpress™

ID

Password

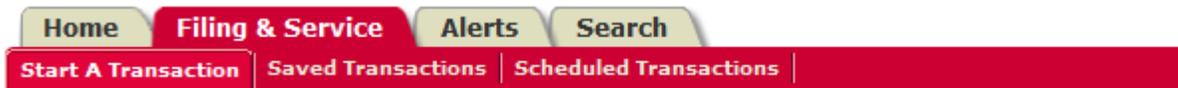
Sign In

[Forgot Password](#) | [Reset 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 Service or contact your firm's Organization Administrator of FSX.
2. Using Microsoft® Internet Explorer or Netscape® Navigator®, open your browser and go to www.fileandservexpress.com
3. Enter your assigned ID and password and click **Sign in**.

Filing & Service Tab



There are 6 easy steps to submitting documents using the FSX “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 into.
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 fax service recipients to receive this transaction you are submitting.
5. **Additional Recipients Tab**- Allows 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 FSX 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 FSX 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

Home Filing & Service Alerts Search

Start A Transaction Saved Transactions Scheduled Transactions

10/22/13 3:07 PM CDT

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: Select a State Case Name:

Court: TX Harris County 245th District Court Case Number: 20131022-245

Find Advanced Search ?

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

1. To begin, click the **Filing & Service** tab. The *Start A Transaction* queue appears.
2. *File and/or Serve in an existing case* is already selected. An existing case is one that has already been given a Court case number.
3. From the drop down menu for State, select Texas and court name in which you choose to file.
4. 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 Queue continued on next page...

Start a Transaction Tips:

- ✓ Reminder -- the name of the court will be different than the name of the court where the new case was filed.
- ✓ Only courts without the (*) should be selected for existing courts, with the exception of the Texas Supreme Court and the Texas Courts of Appeal.

5. Cases matching your criteria will appear in the list below the “Find” button.
6. To select the case, click the red arrow icon to the left of the desired case number.

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

[Start A Transaction](#) | [Saved Transactions](#) | [Scheduled Transactions](#)

10/22/13 3:07 PM CDT

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:
Case Name: ⓘ

Court:
Case Number: ⓘ

To select a case for filing, click  beside the case.

Case List 1 through 1 of 1 Show results per page

▲ Case Number	Case Name	Case Type	Case Class	State	Court	County
 20131022-245	Test Four vs Test Five and Six	Divorce	Family	TX	TX Harris County 245th District Court	hcdistrictclerk.com:245

1 through 1 of 1

Can't find the case you are looking for?
Click on the **Add Case** button to enter your case information.

Start A Transaction Tips:

- ✓ **Adding a Case:** If the case you are trying to file in is not displayed in the Case List results you may click the [Add Case](#) button, enter the case information and FSX will search the TexFile court’s system and transfer the available case information into the FSX system immediately so you can continue your transaction. Detailed instructions on adding a new case are included at the end of this guide in the “Add Case” section.

Documents Tab

10/22/13 3:45 PM CDT

Documents Sending Parties Service Add'l Recipients Review & Submit

Attach Documents Transaction ID: 52349089 Cancel Save & Close

20131022-245 Test Four vs Test Five and Six TX Harris County 245th District Court

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

Type: Motion Statutory Transaction Fee: \$0.00

File: C:\Users\scollins\Desktop\TEST.docx Browse... or Check here to fax your document ?

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

Title: Motion This will be the Main document. Attach Document ?

Maximum length of text is 510 characters

1. Select a Document Type for your document using the drop down menu entitled **Type**.
2. To attach your document, click the **Browse** button in the *File* section. A dialog box will open and from there you can locate the file you previously saved to your hard drive or network. You may also select the *Check here to fax your document* box should you be unable to scan documents (click the ? icon for more details).
3. Enter a title for your document in the *Title* field. The title should comply with local rules for electronic filing and be specific.
4. All documents sent to TexFile Courts are automatically set to Public. Sealed or suppressed documents should not be efiled.
5. Click **Attach Document**.

Documents 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 FSX 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.
- ✓ **Document Title:** Add as much detail as possible here since this is a searchable field. We suggest using the caption title from your document.

6. 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
34717134	Motion	Public	Converted	Main	None Edit Link	Modify	Remove

Document Title: [Motion](#)

- To add more documents, repeat steps 1-5.
- Main/Supporting:** This option lets the user “electronically staple” supporting documents to the main document it supports. In the column by each supporting document, select the document ID for the main document to which it supports. **You may only file ONE MAIN Document. This will be sent to the court as the lead document.**
- 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.

Documents Tab Tips:

- ✓ Please visit the Resource Center under Texas rules to view court specific special instructions on efilng into specific courts.

Sending Parties Tab



1. 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.
2. You may edit your selections by selecting or deselecting the parties.
3. Click the **Service** tab to continue.

Sending Parties Tab Tips:

✓ **Adding a Party to a Case:** If the party you are trying to file for is not available in either the represented or unrepresented parties' lists, *you must contact the court to add them.*

✓ **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

10/22/13 3:51 PM CDT

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

Select Recipients Transaction ID: 52349089 Cancel Save & Close

20131022-245 Test Four vs Test Five and Six TX Harris County 245th District Court

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 2 of 2 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 OPTIONAL SERVICES PRICING SHEET IN THE RESOURCE CENTER FOR COMPLETE COSTS.

Create Custom Group

Service	Party	Party Type	Party Status	Attorney	Firm	Method
<input checked="" type="checkbox"/>	▲ Party					
<input checked="" type="checkbox"/>	Five, Test	Respondent	Active	Bugbash, Joe Bloot	BugBash Firm2	Fax
<input checked="" type="checkbox"/>	Six, Test	Respondent	Active	Bugbash, Joe Bloot	BugBash Firm2	Fax

- To select a party/parties to receive **Fax 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 names.
- To select all parties, click the box below service on the gray header bar. This will automatically select all parties on the service list.
- The method of delivery available on FSX to deliver your documents is by fax and is listed under the Method column.
 - If the designated recipient *is* a registered user of FSX, then a courtesy copy of the documents or notice will be delivered to their **online** account (i.e. Inbox) as well as by fax.
- If a checkbox does not appear for you to select, then you cannot use FSX as a delivery method to send documents to that party and will have to send service to that party via traditional means.

Service Tab Tips:

- ✓ At this time, Fax Service is the only service option on FSX for TexFile courts.
 - If the FSX firm has a fax number stored in their organization information, then that will be the number used. If there is no number or they are not part of a FSX firm, the system will prompt the filer to enter a fax number or select a previously used number.
- ✓ **Note:** If the court you are filing into does not approve service via FSX to a Pro Se or Pro Per party, then you will not be able to select the party and must serve the party traditionally.

✓ **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.

Additional Recipients Tab

Home Filing & Service Alerts Search

Start A Transaction Saved Transactions Scheduled Transactions

3/15/12 2:32 PM CDT Documents Sending Parties Service Add'l Recipients Review & Submit

Select Additional Recipients Transaction ID: 43102276 Cancel Save & Close

03456-A Alice in Wonderland Inc vs Composition Co Mock Court-Filing & Serving

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 ?

To add recipients, enter search criteria above and click Find.

No available selections

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 FSX subscribers and non-member users.
3. **Create Additional Recipient** If no results or inaccurate results appear for the search, then the user will see a button to “Create Additional Recipient”.
4. When creating a new Additional Recipient, the user will now enter both a First and Last Name and will then select either “Online” or “Fax” as the delivery method. On-line will only be an option if the person is a FSX subscriber.
5. After entering a new Additional Recipient, the system will then create a non-member “account” for the additional recipient.
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.

Additional Recipients Tab Tips:

- ✓ **New Additional Recipients:** Newly added recipients will receive emails with instructions as to how to retrieve the documents. They will be provided with a login/password for the sole purpose of retrieving those documents.
- ✓ Generally this feature is used to send courtesy copies of your transaction to clients, co-counsel, etc.

Review & Submit Tab

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



2. Select a delivery option from the following options:

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

- File with the court and Serve selected parties
 - I am sending these documents as "Court-Appointed Counsel/ADR".
 - 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).
- **File and Serve:** The transaction will be filed with the court and served via fax to all designated recipients. It will be available to be viewed and purchased by registered FSX 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 FSX 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 FSX users as a publicly available document.

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

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

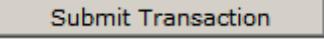
4. Click **Next** to proceed with Filing.

Review & Submit Tab continued on next page...

20131022-245 Test Four vs Test Five and Six TX Harris County 245th District Court

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

Transaction ID: 52349089
Submitted by: Mork Bugbash, BugBash Firm6
Authorized by: Mork Bugbash, BugBash Firm6 [Edit](#)

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.  When the information has been verified and you are ready to proceed, click **Submit Transaction**.
8. Once the Clerk has reviewed your transaction, you will receive an email confirmation if it was accepted or rejected. If accepted, the email will contain a link so that you may access the time-stamped copy of your documents. See below. If the transaction is rejected, you will receive an email with reason for rejection.

Filing Code:(Rule 11 Document(s))

Filing Type:(EFile)

Date Submitted: 10/17/2013 12:39:48 PM

Date Accepted: 10/17/2013 1:36:41 PM

Accepted Comment:

[View Document](#) ←

This link will remain active for 30 days.



Transaction Receipt/Report

File & ServeXpress Welcome: Attorney, Adam Mock Firm A-Bellevue [Resource Center](#) | [File & ServeXpress Preferences](#) | [Sign Off](#)

Home | **Filing & Service** | Alerts | Search

[Start A Transaction](#) | [Saved Transactions](#) | [Scheduled Transactions](#)

12/18/12 5:01 PM CST
 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](#).

TIP: Receive notifications of new Filing & Service activity that match your search criteria. Click on the Alerts tab.

File & ServeXpress Transaction Receipt

Transaction ID:	47870376
Submitted by:	Adam Attorney, Mock Firm A-Bellevue
Authorized by:	Adam Attorney, Mock Firm A-Bellevue
Authorize and file on:	Dec 18 2012 5:02PM CST
Court:	Mock Court-Filing & Serving
Division/Courtroom:	1 - Division 1
Case Class:	Civil
Case Type:	Non-Arbitration

1. Once you click the Submit tab, the page will refresh and you will see a Transaction Receipt. You may print this receipt for your records or search for it on the FSX system by Transaction ID in the future.
2. [transaction report](#). You may order a “Transaction Report” after the transaction is submitted. This report is a comprehensive, up to the date, formal document that will provide all of the transaction details, including Clerk review status and fax service status. Simply click the link on the top that says “transaction report”.
3. Please note that if “fax service” is unable to be completed due to incorrect fax numbers, etc., that information will also be noted in this report. See below.

Transaction Receipt/Report Tips:

- ✓ Sample Transaction Report:

File & ServeXpress

December 18, 2012

Max Powers
 Mock Appeals Firm B-Demo
 13427 NE 16th St
 Bellevue, CA 98005

RE: **File & ServeXpress Transaction No. 42724428**

Official Document
 RPTM 0508191
 December 18, 2012
 10:02:34 AM MST
 File & ServeXpress

Dear Customer:

The following information for File & ServeXpress Transaction 42724428 reflects the details of the transaction contained in the File & ServeXpress system as of December 18, 2012 10:02:34 AM MST.

Lisa Lawyer, authorized by Lisa Lawyer, submitted Transaction 42724428 on February 27, 2012 09:25:57 AM MST to CO Mock County District Court, via File & ServeXpress for the following case:

Case Number	Case Name	Division	Judge
2012CV227	In the Matter of Charles Harris	2 - Division 2	Judge District

The Transaction contained 1 document titled as follows:

ID	Document	Pages	Clerk Review Status
1	Petition to Seal Criminal Record	1	Accepted 02/27/2012 09:30:30 AM MST

The above-mentioned documents within this Transaction were sent to the following 0 recipients:

Should you have any questions about the details of the Transaction as stated above, please contact Customer Support at 1-888-529-7587.

Sincerely,
 File & ServeXpress Holdings, LLC

Page 1 of 1

File & Serve Xpress™

The above-mentioned documents within this Transaction were sent to the following 2 recipients:

Attorney	Party	Notice Type	Delivery Method	Delivery Status
Test firm user admin	plain, qa Plaintiff	Service	Fax	Undeliverable
Test firm user admin	def, qa Defendant	Service	Fax	Undeliverable

Should you have any questions about the details of the Transaction as stated above, please contact Customer Support at 1-888-529-7587.

Sincerely,
File & ServeXpress Holdings, LLC

Add Case:

Home **Filing & Service** Alerts Search

Start A Transaction | Saved Transactions | Scheduled Transactions

3/15/12 3:17 PM CDT

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: Case Name:

Court: Case Number:

To select a case for filing, click  beside the case.

Case Number	Case Name	Case Type	Case Class	State	Court	County
No matches found. Please modify your search and try again.						

Can't find the case you are looking for?
Click on the Add Case button to enter your case information.

For assistance finding your case, call 1-888-529-7587. Want to add more cases for E-service? Contact a representative [online](#) or at 1-800-869-1910.

1. Search for your case on the Start a Transaction tab.
2. If the case you are trying to file in is not displayed in the Case List results you may click the Add Case button, .

Adding a Case While E-Filing continued on next page...

Home Filing & Service Alerts Search

Start A Transaction | Saved Transactions | Scheduled Transactions

3/15/12 3:22 PM CDT

Add Case Information Transaction ID: Cancel Save & Close

Enter a case name and select a case type. Then click **Submit**.
 Note: new lines will be replaced by spaces.

Court Mock Court-Filing & Serving

* Case Class Civil ▾

* Case Type Personal Injury ▾

* Case Name
 (First Plaintiff vs First Defendant)
 Maximum length of text is 200 characters

* Case Number

Submit ?

Adding A Case Tips:

- ✓ While all fields are required, the system is only using the case number for searching.
- ✓ Case number must be an exact match.

1. From the drop down menu, select the Case Class and Case Type.
2. Enter the **case name** and the **case number** of the case you wish to add in the space provided. Click **Submit**. (Case Number must be exact.)
3. FSX will search the TexFile court's system and transfer the available case information into the FSX system.
4. If the case is available on TexFile, the case details will be transferred over and the case will display in the Case List.
5. If the case is not available, no case will display in the Case List. You must then call the Court to inquire.