

File & ServeXpress Special Instructions

7th Judicial District, Illinois Sangamon County Circuit Court



File & ServeXpress™

Topic	Page
Registration Information	2
General Information	3
Preparing Documents	4
Electronic Filing – General Information	5
Entering Your Appearance	6
Initial Complaints	7
Summonses	8
Removing an Attorney From Your FSX Account	9
Most Common Reasons for Rejected Transactions	11
File & ServeXpress Contacts	12

Attorney Registration & Disciplinary Commission (ARDC) Number

If your attorney will be entering an appearance and authorizing transactions in Sangamon County cases, be sure their ARDC number is entered in the Bar # field in their File & ServeXpress account.

Section A: Registration Instructions for New Subscribers

1. Visit <https://os.fileandservexpress.com/web/ui/welcomepage.aspx> to begin the registration process.
2. Add organization information.
3. Add user information for your firm's administrator (primary contact).
4. Add user information for every attorney and staff member in your firm who will need a user ID and password. Include full name, phone, fax, email and bar number (for attorneys). All attorneys of record must have a user ID and password.
5. Review system requirements.
6. Review and accept the "Terms of Service Agreement".

Section B: Registration Instructions for Existing Subscribers (Organization Administrator Adds Users)

1. Sign on to <https://secure.fileandservexpress.com/Login/Login.aspx>
2. Click "File & ServeXpress Preferences" in the upper-right hand corner of the screen.
3. Click the Add User link in the left-hand column under *My Organization Profile*.
4. Enter user information for every attorney and staff member who will need a user ID and password. Include the individual's full name, phone, fax, email and bar number (for attorneys). All attorneys of record must have a user ID and password.

Enabled Case Classes: Law and Chancery cases.

Filing deadline is workdays at 11:59 pm CT. Pleadings will be file stamped with the date of the next business day if e-filed past deadline.

Case Initiation & Summonses: Cases may be initiated electronically or traditionally. Plaintiff firms can originate their cases by electronically filing their complaint and add all the parties through that initial transaction. Since File & ServeXpress (FSX) is integrated with the court's case management system (CMS), cases are available for electronic filing and service on FSX regardless of how they are initiated.

Information regarding electronic filing of a Summons along with the Summons Form is available on the File & ServeXpress Resource Center.

Pleadings for Multiple Parties Must be Uploaded as Separate Transactions: If you intend to submit pleadings in the same case on behalf of two or more parties, you must submit separate transactions for each party.

Firms should NOT combine multiple pleadings together as one PDF file: For example, a firm should upload their Motion for Summary Judgment, then upload their exhibits, and their Proposed Order as separate documents . The court will reject any transaction that has combined their documents as one file, with the exception of Summonses. Information regarding electronic filing of a Summons along with the Summons Form is available on the File & ServeXpress Resource Center.

Document & Transaction Size Limitation: The Court's case management system has a size limitation of 5M per document and 60M per transaction. If your document exceeds 5M, we recommend parsing it into two or more documents and uploading them separately within the same transaction. Be sure to title the documents accurately labeling them as part 1,part 2, etc. Similarly, if your transaction exceeds 60M, you will need to break it up and start another transaction. You may want to notify the clerk using the Note to Clerk box on the "Review & Submit" tab.

All sealed documents must be filed in the traditional paper manner: Firms can elect to e-serve their sealed documents by selecting **Serve Only Private** on the Review & Submit tab.

Electronic Filing - General Information

Document Type: Do not select the document type "**Discovery - Use for Electronic Service Only**" when E-filing your Documents with the Court. This document type is ONLY to be used when e-serving discovery to counsel on the case. When this document type is selected for e-filing, it causes integration errors with the transaction and it does not docket properly over to the court's case management system. Remember that you should only be e-serving discovery and not filing it with the court.

Main/Supporting: Firms should **electronically "staple"** supporting documents to the main document using the Main & Supporting Column. For example, if a firm uploads a Motion for Summary Judgment, two Exhibits and a Proposed Order, the Motion is the "Main" document while the other documents "Support" the main document. Simply select the document ID# from the pull down menu that corresponds to the Main document to "staple" the supporting documents to the main document. This is helpful for court personnel and case participants.

Authorizing Attorney: Remember to select the **Lead Attorney** or Co-Counsel as the Authorizing attorney for the transaction. Any authorizing attorney should have Entered their Appearance for that particular case. If you select an attorney who has not entered their appearance, it will cause integration issues and will not docket properly to the court's case management system.

Entering Your Appearance

E-filing your firm's Entry of Appearance To E-file your Entry of Appearance correctly, follow these steps:

1. When E-filing your firm's Entry of Appearance, select one of these document types available on the Documents Tab:
 - Appearance
 - Appearance – Fees Previously Paid
 - Special and Limited Appearance
 - Special and Limited Appearance – Fees Previously Paid
2. Use the Add Attorney button on the Sending Parties tab for each attorney listed on the Entry of Appearance pleading. Failure to do so will result in the attorney not displaying on the service list of the case. If you have 4 attorneys listed on the Entry of Appearance, you will need to follow the Add Attorney steps 4 times for that party.
3. On the Review & Submit tab, select the Lead Attorney as the Authorizing Attorney when submitting the transaction.

Note on Co-Counsel: Appearances for co-counsel in the same firm is not required. They can either file an appearance and use the 'Add Attorney' button, or always select the lead attorney as the authorizer even if co-counsel signed the document.

Note to Plaintiff's Counsel: When e-filing your complaint, you will only be able to add the Lead Attorney. Do not attempt to add additional attorneys during that initial transaction. You can add additional attorneys to the case when you e-file your second transaction into the underlying case by using the Add Attorney button.

Initial Complaints

When initiating a case electronically, the document type you select for the “complaint” should match the type of case you are filing.

For example, if you are filing a “Structured Settlement” case, when uploading your initial complaint, select the document type “Structured Settlement”:

The screenshot displays the File & Serve Xpress web interface. At the top, it shows the user's name, "Attorney, Adam Mock Firm A-Bellevue", and navigation links for "Resource Center", "File & ServeXpress Preferences", and "Sign Off". The main navigation bar includes "Home", "Filing & Service", "Alerts", and "Search". Below this, there are tabs for "Start A Transaction", "Saved Transactions", and "Scheduled Transactions". The current date and time are "5/13/14 1:09 PM CDT". The main content area is titled "Attach Documents" and shows the case name "John Smith vs Jane Doe IL Sangamon 7th Judicial Circuit Court" and the transaction ID "52398799". A "Statutory Transaction Fee: \$0.00" is also displayed. The "Type:" field is set to "Statement of Service". The "File:" field is set to "Response to Petition". The "Access:" field is set to "Satisfaction Filed Judgment". The "Title:" field is set to "Statement of Service". The "Attached Documents:" field is set to "No Documents". A dropdown menu is open, showing a list of document types, with "Structured Settlement*" selected. A tooltip for "Structured Settlement" is visible. An "Attach Document" button is present.

File & Serve Xpress 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

5/13/14 1:09 PM CDT Case **Documents** Case Parties Review & Submit

Attach Documents Transaction ID: 52398799 Cancel Save & Close

John Smith vs Jane Doe IL Sangamon 7th Judicial Circuit Court

For each document, complete each field and click **Attach Document**. A (*) indicates a document type that may be an originating document; a (**) indicates a document type that may be an originating or subsequent document; document types with no asterisk are valid subsequent document types for this court.

Type: Statement of Service **Statutory Transaction Fee: \$0.00**

File: Response to Petition

Access: Revive Judgment

Satisfaction Filed Judgment

Special and Limited Appearance

Specific Performance *

Title: Statement of Service

Statement of the Case

stipulated

Stipulated Agreement

Stipulation

Attached Documents: Stipulation to Dismiss

No Documents

Structured Settlement *

Subpoena

Subpoena for Deposition Served

Subpoena for Witness

Supplemental

Supplemental Affidavit for Attorney Fees

Supplemental Disclosure

Supplemental Discovery

Supplemental Interrogatories

Supplemental Request to Produce

Tax Information

Temporary Restraining Order *

Third Party Complaint

Trust *

Verification

Structured Settlement

Attach Document ?

Summonses are unique:

- A specific section of the document must be left blank for the stamp. The form with this blank can be found on the Resource Center.
- Select the document type: “Summons”.
- Multiple summonses must be uploaded as separate documents but can be uploaded within the same transaction.
- Firms are responsible for getting file stamped copies of documents to the proper service providers (Sheriff, Private Process server, etc).

Removing an Attorney From Your File & ServeXpress Account

IMPORTANT INFORMATION

How To Properly Handle the Departure of an Attorney From your Firm on File & ServeXpress:

It is the responsibility of the law firms to ensure the service lists accurately represent the party/attorney relationship. Firms must take the following steps when an attorney leaves their firm to ensure the integrity of the service list(s) is maintained.

- 1. File the Appropriate Pleading with the Court** – Prior to the attorney leaving, the firm should use the My Attorneys link to get a complete list of cases that particular attorney is listed on. The firm should then file a Notice of Withdrawal or Substitution of Counsel to remove the attorney from the cases. It is recommended that these substitutions or withdrawals are done prior to the attorney leaving the law firm.
- 2. Remove the Attorney From your File & Serve Account** - Once the court has signed off on the Substitution or Counsel or Notice of Withdrawal (thereby updating the service list to reflect the new status of the attorney), you can remove the attorney from your firm's File & Serve account. If the attorney is taking the cases with them, the cases will "follow" the attorney to their new firm when they register for another File & Serve ID. If the attorney is not taking the cases, the Substitutions of Counsel or Notices of Withdrawal will accurately update the service lists to reflect current representation.

Removing an Attorney From Your File & ServeXpress Account

- 3. Alerts and Forward Notifications** - Remember that any alerts or forward notifications the attorney had in place at your law firm will no longer work once they are deleted from your firm's File & ServeXpress account. You will need to establish new forward notifications or new alerts so you are kept abreast of the transactions submitted in your firm's cases. You should ALWAYS delete alerts for any user who is leaving your law firm.

When a firm fails to withdraw an attorney who has left, that attorney remains on the service list as counsel for your firm's client(s). That attorney could potentially continue to receive service notifications for your client if they update their email address on File & ServeXpress to their new location.

Most Common Reasons for Rejected Transactions

The Court will reject an e-filed transaction for a variety of reasons. When that occurs, firms must resubmit the transaction. Firms can see the reason for rejection by pulling up the transaction details and clicking on the Document History link.

Common Rejection Reasons:

- Firms combine multiple documents as one pleading.
- Firms upload the wrong document/pleading.
- Case number on pleading does not match case selected for Efiling.
- Firms E-filing discovery that should only be E-served.
- Sending parties selected and parties on pleading do not match.
- Duplicate pleading.
- All exhibits have to be marked "exhibit" on the first page.
- Multiple defendant's cannot file separate pleadings within the same transaction.

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