File & Serve Xpress™

Search Tab
User Guide

Search Tab

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File & ServeXpress
Resources

File & ServeXpress 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 File & ServeXpress by clicking on the Resource Center link at the bottom of your screen. The Resource Center contains our training registration information, jurisdiction specific rule & 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. Click here to access the login page.

» **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.

Searching Overview

Search Tab Tips:

Use the Search Page to find documents, filings, case histories and cases in File & ServeXpress.

✓ You can do a Cases Search from the Home Page by using the Quick Start feature. Choose the Jurisdiction and Court and then enter the Case Number and click the Case Search button.

There are 5 different searches available for your convenience:

1. **Case History** – Pull up a printable list of transactions filed in a particular case.
2. **Cases Search** – Search for Cases Attorneys/firms/parties are involved in.
3. **Daily Docket** – Search for all transactions filed in a particular court on a given day.
4. **Transaction Status** – Find out the status of transactions pending before the court clerk/judge.
5. **Advanced Search** – Search for documents and transactions using a variety of criteria.

Search Tab Tips:

✓ **Note:** Please note that the number of searches caps at 2000 results. If you receive more results than our system will allow, your list will not be complete. You may wish to narrow the search further.

✓ **Note:** If you need a list of 2,000+ cases, please contact Client Service and ask them to provide it in an Excel spreadsheet. This is particularly helpful when using Cases Search to search for all cases involving an attorney leaving your firm.

***Advanced Search, Daily Docket, and Transaction Status searches now provide up to 5,000 documents in the results**

Case History

Case History Tips:

✓ **Functions:** Search for a list of specific cases by court and view case jacket details at NO CHARGE. You will be charged for Research if your firm is not counsel of record on the case.

✓ **Pricing:** If you choose to view the docket, you will be charged for the search. If you choose to open documents, you will be charged per document. We suggest that you download all of the documents you purchase to avoid additional Search fees.

✓ **Note:** ALWAYS CHECK THE FILE & SERVEXPRESS RESOURCE CENTER FOR MOST UP-TO-DATE PRICING.

✓ **Note:** When the Search Tab is clicked, the system will default to the Case History queue.

Use the **Case History Search** to view a complete list of documents submitted in a particular case or case group. (Note that this excludes any Sealed or Serve Only – Private documents that were not served on someone within your firm). Please note that any field with an asterisk (*) is mandatory.

Access the **Case History Search** from the **Home Page** by hovering over the Search header and selecting Case History from the drop-down list.

Case History Search

Use this search to review all firm accessible transactions both filed and served into a specific case. Your results may include pending and rejected transactions based on search criteria and case settings. Access to service documents will be determined by the service options selected by the filer.

Define your search: (* indicates a required field.)

1. Select a court and enter a case name below.
2. To change the scope of your search, enter dates in the *Start Date* and *End Date* fields.
3. Then click **View**.

* Jurisdiction: Colorado ▼
* Court: Colorado Mock County Court ▼
* Filter: ○My Transactions ○Transactions in My Firm's Cases ⦿All Transactions

⦿ Case Number:[i] 2011C1611   Case Name:[i] [   ]
or
○ Case Group Name: [   ]
with
* Transaction Option: ○All Documents ○All Documents Sent to Court ⦿Document Upload

Start Date: [   ] (mm/dd/yyyy)
End Date: [   ] (mm/dd/yyyy)
☑Display as color-coded docket

[View] [Clear]

To conduct **a Case History Search**, follow the steps below:
1. Select **Jurisdiction**.
2. Select **Court**.
3. Select **Filter** option (My Transactions, All Documents Sent to Court, Or Document Upload).
4. Enter in search criteria (full or partial **Case Number** or **Case Name** or **Case Group Name**).

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Case History Tips:

✓ **"Paper" Icon:**
Please note, that if the Organization Administrator in your organization has allowed for entry of notes in this report, you will see "paper" icons next to each document listed, as well as one on the top of the docket next to the case number. This allows individuals to enter notes and mark either "private" or "shared".

3. Select **Transaction Option**.
4. Select **Date Range**, if desired.
5. Click **View**. A list of cases matching your criteria will appear:
6. Click the **View** link to view the Case History for that case.
7. Click the **Case Number** to view the Case Information.
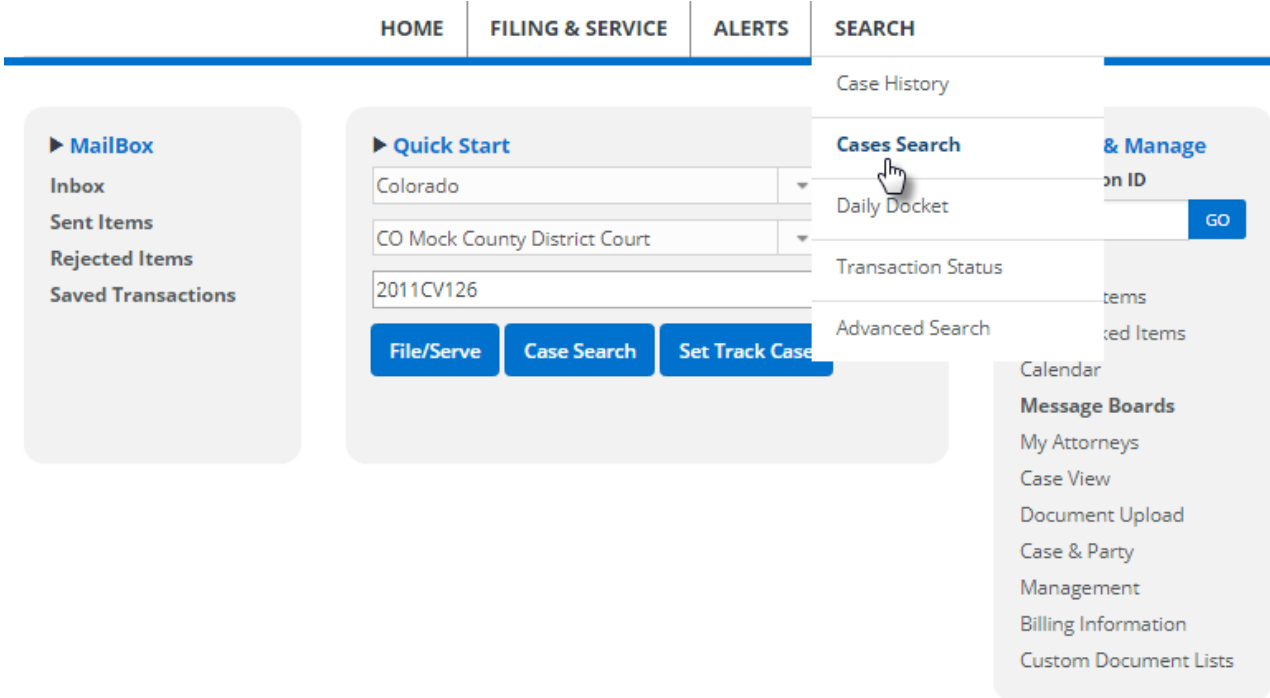
Case History Search > **Select Case**

Jurisdiction: **Colorado**
Court: **Colorado Mock County Court**
Case Name:
Case Number: **2011C1611**

Case History Search Available Cases | Show 50 ▼ records

	▲ Case Number	Case Name	Case Status
[view]	2011C1611	Mock Collections Agency vs. Frombo, Dabny	Active

Cases Search

Cases Search Tips:

✓ **My Cases –** Contains all documents filed by, served to, or purchased by anyone in your firm.

✓ **All Cases –** Access to all e-filed documents in File & ServeXpress that are not Sealed or Served Privately. You may be prompted to purchase documents before printing them in All Transactions if they have never been served upon your firm.

Access the **Cases Search** from the **Home Page** by hovering over the Search header and selecting Cases Search from the drop-down list.

Use **Cases Search** to search for attorney/firm case lists, case Information and parties named in cases. This search is especially useful if you need to pull up a list of cases that a particular firm, attorney or party is involved in.

To Conduct a **Cases Search**, take the following steps:

1. Select the **Jurisdiction**.
2. Select the **Court** (if you wish to narrow the search further).
3. Choose **Case Class**.
4. Choose Filter (**My Cases or All Cases**).
5. Enter your search parameters (such as **Firm Name, Attorney Name, Party Name, Case Name or Case Number**). You may enter as much information as you like, but keep in mind that the more information that you enter, the further you will narrow your results.
6. Click **View**. A list of cases matching your criteria will appear:
7. Click the **View Case History** link to view the Case History for that case.
8. Click the **Case Number** to view the Case Information

Cases Search

Use this search to review a list of all court specific cases. From the search results you will be able to view the case parties, transactions and individual documents. Access to service documents will be determined by the service options selected by the filer.

Define your search: (* indicates a required field.)

1. Select Jurisdiction.
2. To change the scope of your search, select or enter additional information in subsequent fields.
3. Then click **View**.

* Jurisdiction: -- Select --
Court: No courts available
Case Class: No case classes available
* Filter: ○My Cases ●All Cases
Firm Name: begins with [   ] ☑Display Firms in Results?
Attorney Name: First Name [   ] Last Name [   ] ☑Display Attorneys in Results?
Party Name: Organization/Last Name [   ] First Name [   ] ☐**Display Parties in Results?**
☐**Select specific party names** [Enter the following information about your filing.]
Party Type:
Case Name: [   ]
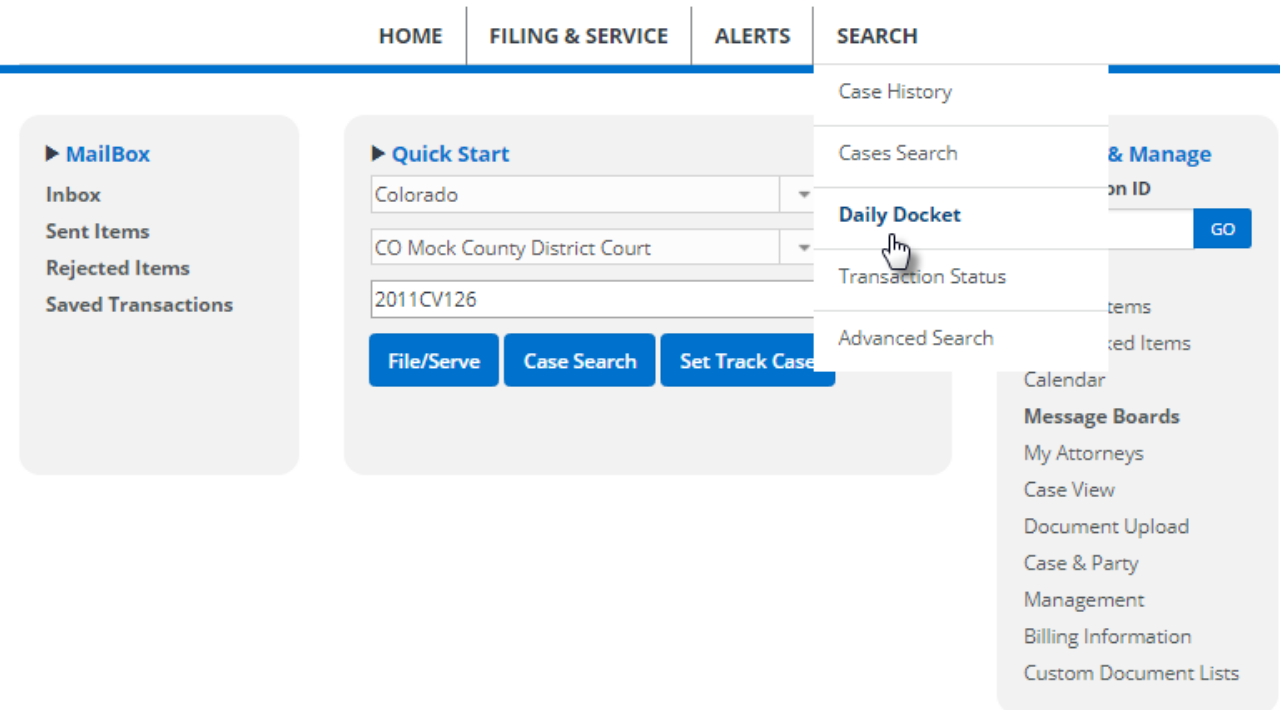Case Number: [   ]
* Sort by: Case Name

View Clear

Cases Search Tips:

✓ **Functions:** search Statewide for cases. View cases by jurisdiction or jurisdiction and court, access case jacket, case history, and individual documents.

✓ **Pricing:** any time the "All Cases" radio button is selected, your firm will be charged- even if you are searching your firm's cases. You will be charged to search "All Cases," and per document. To avoid charges, select the "My Cases" radio button.
Note: ALWAYS CHECK THE FILE & SERVEXPRESS RESOURCE CENTER FOR MOST UP-TO-DATE PRICING.

✓ **Note**: If you need a list of 2,000+ cases, please contact Customer Service and ask them to provide it in an Excel spreadsheet.

✓ **Advanced Search, Daily Docket, and Transaction Status searches now provide up to 5,000 documents in the results

Daily Docket

HOME **FILING & SERVICE** **ALERTS** **SEARCH**

Case History

Cases Search

Daily Docket

Transaction Status

Advanced Search

▶ **MailBox**
Inbox
Sent Items
Rejected Items
Saved Transactions

▶ **Quick Start**

Colorado

CO Mock County District Court

2011CV126

File/Serve **Case Search** **Set Track Case**

& Manage
on ID **GO**

...tems
...ed Items
Calendar
Message Boards
My Attorneys
Case View
Document Upload
Case & Party
Management
Billing Information
Custom Document Lists

Access the **Daily Docket Search** from the **Home Page** by hovering over the Search header and selecting Daily Docket from the drop-down list.

The **Daily Docket** Search allows you to pull up every document that has been submitted in a particular jurisdiction on any given day. This is especially useful if you are not sure what attorney/firm submitted the transaction or if you are in a jurisdiction where all transactions are deemed served.

Daily Docket Tips:

✓ **Pricing:** any time the "All Cases" radio button is selected, your firm will be charged- even if you are searching your firm's cases. You will be charged to search "All Cases," and per document. To avoid charges, select the "My Cases" radio button. Note: ALWAYS CHECK THE FILE & SERVEXPRESS RESOURCE CENTER FOR MOST UP-TO-DATE PRICING.

✓ **My Firm's Transactions –** Contains all documents filed by, served to, or purchased by anyone in your firm.

✓ **Transactions in My Firm's Cases –** Contains all documents in cases where someone from your firm is on the case participant list.

✓ **All Transactions –** Access to all e-filed documents in File & ServeXpress that are not Sealed or Served Privately. You may be prompted to purchase documents before printing them in All Transactions if they have never been served upon your firm.

Daily Docket Search

Use this search to review a daily docket of all firm accessible accepted transactions filed or served into a specific court and case class. Access to service documents will be determined by the service options selected by the filer.

Define your search: (* indicates a required field)

1. Select an item from each list below.
2. Then click **View**.

* Jurisdiction: `-- Select -- ▼`
* Court: `No courts available ▼`
* Case Class: `No case classes available ▼`
* Filter: ○My Transactions ◉Transactions in My Firm's Cases ○All Transactions
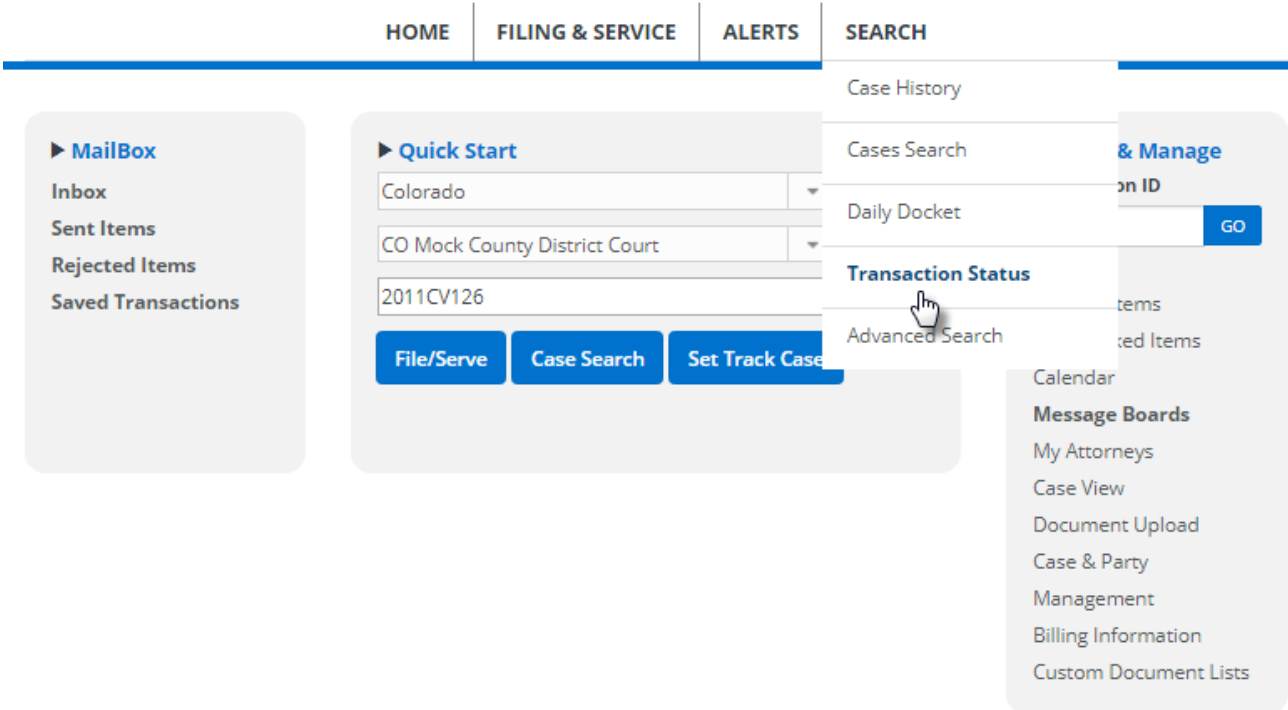* Day: `_____` (mm/dd/yyyy)
* Transaction Option: ◉All Documents ○All Documents Sent to Court

`View` `Clear`

To conduct a Daily Docket Search, complete the following steps:

1. Select your Jurisdiction.
2. Select your Court.
3. Select your Case Class (if applicable).
4. Select your Filter (My Transactions, All Document Sent to Court, Or Document Upload).
5. Enter the Day you wish to retrieve documents for.
6. Select your Transaction Option (this allows you to narrow your results to only those documents submitted to the court for review.)
7. Click View. A list of cases matching your criteria will appear.
8. Click the Transaction Number link to view the Transaction Details page.
9. Click the Case Number to view the Case Information.
10. Click the   link(s) to view the document.

Transaction Status

Access **the Transaction Status Search** from the **Home Page** by hovering over the Search header and selecting Transaction Status from the drop-down list.

The **Transaction Status** Search provides quick access to documents pending before your court. This is a great way to keep abreast of the transactions you have pending at the court.

Transaction Status Tips:

✓ **My Firm's Transactions –** Contains all documents filed by, served to, or purchased by anyone in your firm.

✓ **Transactions in My Firm's Cases –** Contains all documents in cases where someone from your firm is on the case participant list.

✓ **All Transactions –** Access to all e-filed documents in File & ServeXpress that are not Sealed or Served Privately. You may be prompted to purchase documents before printing them in All Transactions if they have never been served upon your firm.

Transaction Status Search

Use this search to review all firm accessible transactions in a specific case, this may include accepted, pending and rejected transactions. For more efficient searching, please enter three or more characters when searching by partial Case or Party name. Access to service documents will be determined by the service options selected by the filer.

Define your search: (* indicates a required field)

1. Select an item from each list below and enter any search criteria to narrow your search.
2. Then click **View**.

* Jurisdiction: [-- Select -- ▼]
* Court: [No courts available ▼]
* Case Class: [No case classes available ▼]
* Filter: ○My Transactions ◉Transactions in My Firm's Cases ○All Transactions
* Document Type:
  Sending Firm: **0 Selected** [Find Firm] [Clear]
  Served Firm: **0 Selected** [Find Firm] [Clear] ☐Display Served Firm(s)?
  Authorizing Attorney: [   ]
◉ Case Name: [i] [   ]
  Case Number: [i] [   ]
  or
○ Case Group Name: [   ]
  Start Date: [   ] (mm/dd/yyyy)
  End Date: [   ] (mm/dd/yyyy)

[View] [Clear]

To conduct a Transaction Status Search, complete the following steps:

1. Select your Jurisdiction (mandatory).
2. Select the Court (mandatory).
3. Select Filter (My Transactions, All Documement Sent to Court, Or Document Upload-mandatory).

Transaction Status Tips:

✓ Any **linked documents** or Legal Citations associated with the transaction are viewable from the Transaction ID page. Click on the Transaction ID in the Transaction column to view the Transaction ID page.

✓ To Print the document list, click on the **Printable Version** link at the top, right-hand side of the list.

4. Select Document Type(s) (mandatory). You may choose more than one by holding the CTRL key down while clicking on the desired types.
5. Choose how you wish to search (by Sending Firm or Served Firm, Authorizing Attorney or Case Information). You may enter as much criteria as you wish but keep in mind that entering a lot of information will narrow your results significantly.
6. Enter a Date Range.
7. Click View. A list of cases matching your criteria will appear.
8. Click the **Transaction Number** link to view the Transaction Details page.
9. Click the Case Number to view the Case Information.
10. Click the [view] link(s) to view the document.

Advanced Search

Access the **Advanced Search** from the **Home Page** by hovering over the Search header and selecting Advanced Status from the drop-down list.

Advanced Search Tips:

✓ **Functions:** search at a more granular level with the most available search criteria fields, filter by document type, authorized date or date range, and many other options.

✓ **Pricing:** anytime the "All Cases" radio button is selected, your firm will be charged- even if you are searching your firm's cases. You will be charged to search "All Cases," and per document. To avoid charges, select either the "My Cases" or the "Transactions in My Firm's Cases" radio button. Note: ALWAYS CHECK THE FILE & SERVEXPRESS RESOURCE CENTER FOR MOST UP-TO-DATE PRICING.

Use the Advanced Search to find documents and transactions using a variety of criteria. Advanced Search offers the most robust search. Users can filter searches by document types, authorized date, and date range among many other individual criterion. Please note that any field designated by an asterisk (*) is mandatory.

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Advanced Search Tips:

✓ **My Firm's Transactions –** Contains all documents filed by, served to, or purchased by anyone in your firm.

✓ **Transactions in My Firm's Cases –** Contains all documents in cases where someone from your firm is on the case participant list.

✓ **All Transactions –** Access to all e-filed documents in File & ServeXpress that are not Sealed or Served Privately. You may be prompted to purchase documents before printing them in All Transactions if they have never been served upon your firm.

✓ Use **contains** to find results that contain the criteria you have entered.

✓ Use **begins with** criteria to find results that begin with your criteria.

✓ Use **ends with** to find results that end with your criteria.

✓ Use **equals** to find exact matches to your criteria.

Documents and Transaction Information Search
Use this search to review firm accessible transactions in a variety of different statuses using an array of search criteria and filters. For more efficient searching, please enter three or more characters in all free text fields. Access to service documents will be determined by the service options selected by the filer.

Enter a Transaction ID then click **Retrieve**.

Transaction ID equals [   ] [Retrieve]

Select one or more search fields and enter search criteria. To filter by authorized date, select a range from the *Authorized Date* menu or enter dates in the *From* and *To* fields. Then click **Search**. (* indicates a required field)

* Jurisdiction: Washington ▼
Court: Mock Court-Filing & Serving ▼
Case Class: -- Select -- ▼
* Search: ○My Transactions ●Transactions in My Firm's Cases ○All Transactions
Case Name: begins with ▼ [   ] ⓘ
Case Number: begins with ▼ [   ] ⓘ
Authorizing Firm: begins with ▼ [   ]
Authorizing Attorney: begins with ▼ [   ] (Last, First Middle)

Document Type(s):
Commercial Court Claim Form
Complaint
Complaint - 3rd Party
Complaint - Amended
Select All
(Control+Click or Option+Click to select more than 1)

Authorized Date: last 7 days ▼ OR from [   ] to [   ]
(mm/dd/yyyy) (mm/dd/yyyy)

Other Options: -- Select -- ▼ begins with ▼ [   ]
-- Select -- ▼ begins with ▼ [   ]

* Transaction Option: ●All ○File To Court ○Serve Only

[Search] [Clear]

To conduct an **Advanced Search**, complete the following steps:

1. Choose **your jurisdiction**.
2. Choose a **Court** if applicable.
3. Choose a **Case Class** if applicable.
4. Select **Search** (My Transactions, All Documents Sent to Court, Or Document Upload-mandatory).
5. Enter your search criteria next to the search parameter that best describes what you know about the document(s), (**Case Name, Case Number, Authorizing Firm, Authorizing Attorney**).
6. Select **Authorized Date** or use the **Date Range** option to designate a specific date range.
7. **Other Options** include:

8. Click **Search**. A list of transactions matching your criteria will appear:

9. Click the **Transaction Number** link to view the Transaction Details page.
10. Click the **Case Number** to view the Case Information.
11. Click the **[view]** link(s) to view the document.

Advanced Search Tips:

✓ **Note:**
The Column Headers in each list are hyperlinked so that you can rearrange the list alphabetically, reverse alphabetically, chronologically or reverse chronologically by column.

Transaction Details Page

Click on any Transaction Identification Number to view the details for that transaction.

Documents/Transactions Search > Results > **Transaction 50432102**

Printable Version   Transaction Report   <<Previous transaction   Next transaction>>

Case number: test [View Case History]   Filed only at 3/11/2013 1:15 PM CDT
Case name: Hill, Morgan vs Washington Transportation
Court: Mock Court-Filing & Serving

Judge: Jerry, Judge

◉ View all document(s) as a list   ◯ View document(s) inline

⊟ Document List (2) Total Statutory Fees: $175.00	
Main Document, 1 page ID: 65096404	
Document History	PDF Format	Original Format	
Document type: Complaint	**Clerk review status/action:** Accepted
Security: Public	**Date reviewed:** 6/30/2014
Statutory fee: $175.00	
Document title: Complaint	
Main Document, 1 page ID: 65096405	
Document History	PDF Format	Original Format	
Document type: Exhibits	**Clerk review status/action:** Accepted
Security: Public	**Date reviewed:** 6/30/2014
Statutory fee: $0.00	
Document title: Exhibit A - pages 1-5, photographs	

⊟ Other Transaction Data
Sender Note to Clerk:
Please waive statutory filing fee. Already paid on Motion for Extension of Time.
This note was added by the sender. It can only be viewed by court users and members of the sending party's organization.
Transaction Comment:
None
Client matter code
#HIL0123

Transaction Details Page Tips:

✓ **Note:** Rejected documents are not removed from the served attorney's access. The filing attorney should make the determination as to whether or not service should be completed again

✓ **Note:** The PDF Format hyperlink will open the document in the converted format and the Linked Documents hyperlink will open a new window with the details and link to the document.

Parties and Recipients

Sending Parties (1)

▲ Party	Party Type	Attorney	Attorney Type	Firm
Hill, Morgan	Plaintiff	Attorney, Adam	Attorney in Charge	Mock Firm A-Bellevue

Courtesy Copy Recipients (0)

none available

Sender Information

Submitted by:	Adam Attorney, Mock Firm A-Bellevue
Authorizer:	Adam Attorney, Mock Firm A-Bellevue

<<Previous transaction   Next transaction>>

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Client Support
☎ 1-888-529-7587
✉ support@fileandserve.com
💬 Chat Online

Viewing a document in its original format:

Click the **Original Format** link of the document list. The document opens in the program it was created. If you do not have the same program that the file was originally created, you may be able to open the document with a different program, but may not retain the same formatting (i.e. Word and WordPerfect files).

Viewing Clerk Review Status and History

To view Clerk Review status, look to the right hand side of the document information in the document list. Further information may be found in the Document History Link for each document in the transaction. Clerk review status includes:

>**Pending –** The transaction has not yet been reviewed by court clerk staff.
>**Accepted –** The transaction has been reviewed and accepted into the court case file.
>**Rejected –** The transaction did not meet certain requirements of the clerk's office or was mis-filed.

Viewing Judicial Action

In some courts, Judges and other court personnel can issue rulings or take action on certain documents. The **Document List** and **Document History** link will reflect the Judicial Action taken. Judicial action includes:

>**Pending** - indicates that no action has yet been taken.
>**Granted/Denied/Granted in part/Denied in Part (or applicable terms)** – Indicates Judicial Action has been taken.

To view the documents submitted as a result of the Judicial Action, click the **Linked Documents** hyperlink. A **Linked Documents** window appears with the related documents.