

Party Groups - Processes and Procedures

Party Groups allows you to save the parties you enter on the *Parties* tab when initiating a new case and use that group of parties in future cases. This will save you time with each case initiation because you will not have to enter the same parties every time you electronically file a new complaint.

There are two important changes to the process of adding Party Groups to the system:

1. To ensure proper additions to the system, please email your Party Group lists in an excel spreadsheet to Anne Vitale at avitale@fileandserve.com. We will add the Party Group list to the system for you and update you when it is complete. The Party Group will have a standard naming convention that starts with your firm's name. However, we will add any unique identifier that you send us to the name (e.g. "ABC Firm Party Group 1", or "ABC Firm Standard Defense List").
2. You will still be able to remove or add parties to service lists in individual transactions. However, if a permanent change needs to be made to a party group, please send the update to Anne Vitale at avitale@fileandserve.com and we will make the change and update you when it is complete.