

E-service Quick Reference Guide

Filing & Service tab



- a. Select **State** (Florida) & **Court** (FL Miami-Dade County 11th Circuit E-Service-Chinese Drywall or FL Palm Beach County 15th Circuit E-Service-Chinese Drywall)
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. Example: Defendant Jones' Answer to Complaint
6. Click **Attach Document**.
7. Repeat steps 1-6 for additional documents.

Specific Tips/Reminders for Chinese Drywall Participants:

- ./ Remember! You must continue to **file** documents in paper format with the court.
- ./ You should e-serve the documents into the specific case. Only submit documents in the "Master" case if they apply to **all** cases.
- ./ You may **e-serve** documents that are not **filed** with the court (i.e. correspondences or discovery documents).
- ./ 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

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.

- ./ “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



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

- ./ 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

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Documents

Sending Parties

Service

Add'l Recipients

Review

Select Recipients

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

Additional Recipients tab (optional)

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Documents

Sending Parties

Service

Add'l Recipients

Review & Submit

Select Additional Recipients

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.

- ./ 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/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 the party/firm/attorney
- ./ You may skip this tab if you are not going to modify the pre-selected list.
- ./ 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 and Submit tab

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Documents

Sending Parties

Service

Add'l Recipients

Review & 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.

./ **Read Statuses** are available at no additional cost for Chinese Drywall transactions. This feature will reveal the date and time the e-served recipient read the transaction.

Other Helpful Tips for Using File & Serve in the Chinese Drywall Litigation

Searching for Chinese Drywall 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: \$15.00 per Alert setup, 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 firms: because all parties 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.*

Create **Custom Groups** if you are sending documents on behalf of certain parties or serving certain parties often:

- ***Custom Groups** can be set up in both the sending parties and the service tab. Simply select the parties in which you are sending documents on behalf of or serving, provide a name for the custom group and select “**create custom group**”.*

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 Customer Support – 888.529.7587
- File & Serve Blog: <http://fileandserve.typepad.com>