

File & Serve Quick Reference Guide

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Registering as a User with an Existing Firm

You can register as a user if your Firm Administrator has already registered with the system and approved users to self-register.

Note: You must know your firm's name to set up your account. The Firm Administrator may not allow users to self register. If this is the case, the firm's name is not available when searching, and you must contact the Firm Administrator to be registered.

Perform the following steps to register as a user in the firm:

1. Click the **Register Now** link on the login screen.
The **Registration Wizard** opens.
Note: There is no fee to sign up for the product.
Note: Registration options vary by site.
2. Select the **User with an Existing Firm** option.
3. Click the **Next** button to select your firm, or click the **Cancel** button to cancel the registration process.
4. Type your **Firm Name**, or click the **Search** button to view a list of all available firms.
5. Select your firm's name from the list.

6. Click the **Next** button to enter your account information; click the **Previous** button to return to the previous screen; or click the **Cancel** button to cancel the registration process.

Note: An asterisk (*) indicates required information.

7. Complete the **User Information** form.
8. Enter a simple **Security Question** in the field provided. (Example: What was your high school mascot?)
9. Enter a **Security Answer** in the field provided.

Note: Select **I am also an Attorney** if you are an attorney, and then enter your attorney number in the field. Attorney number formats vary by site; refer to your court's website for information on how to enter your attorney number.

Note: Click the **Verify** button if prompted. This verifies your attorney number is in the system.

10. Click the **Register** button. The system displays the **Your Registration is Complete.** message on the screen.
11. Record the login details displayed for your records.
12. Click the **Finish** button.

Logging in

Perform the following steps to log in:

1. Go to your home page.
2. Enter your e-mail address and password (case-sensitive) in the fields provided.
3. Click the **LOGIN** button.

Case Search

Search for a case by selecting a location, entering a case number or a party name.

Advanced Search

The **Advanced Search** feature provides the ability to search by party name using a person's name or a

business name. The **Advanced Search** feature includes the ability to filter a search by party name based on the location or the case type.

Performing an Advanced Search by Person

Search for a case by selecting a location, entering a case number or a party name. The **Advanced Search** feature provides the ability to search by party name using a person's name. The **Advanced Search** feature includes the ability to filter a search by party name based on the location or the case type.

An asterisk (*) indicates a required field. **i**

Note: Color themes may vary by site.

Complete the following steps to perform an **Advanced Search** using the **Person** option:

1. Click the **Advanced Search** link in the **New Case** section at the top of the screen to open the *Advanced Search* dialog box.

The *Advanced Search* dialog box opens.

2. Select the **Person** check box.

i Note: Check boxes are configurable. This option may vary by site. For example, some clients may only have businesses in CMS, so a check box is not required.

3. Complete the fields in the *Advanced Search* dialog box.
4. Click the **Search** button to continue or the **Cancel** button to cancel. Click the **Reset** button to reset the form.


The search results are displayed.

Filing into an Existing Case

You can file into an existing case once you have initiated a case.

1. Click the **WORKSPACE** link at the top of the page.


i Note: This will take you to the Filings screen.

- a. Locate your case on the **Filings** screen.
- b. Click the  icon to file into the case.

i Note: The system will not allow subsequent filings into cases not accepted by the court.




- c. Enter the details for the parties involved in the case.

i Note: The courts can now prevent users from adding new parties on subsequent filings.

- d. Click the  button to save and continue.
- e. Enter the filing details for the case.

A filer is required to resubmit documents when changing a filing code.

i Note: An error message is displayed instructing the filer to resubmit documents if the current filing code has changed.

- f. Click the  button to save and continue.
- g. Select the contacts to receive service for this envelope.
- h. Click the  button to save and view a summary of the case.
- i. Click the  button to submit the filing.

Filing a New Case

File a new case using the **Case Information** screen.

A payment account and a filing attorney must be set up prior to filing a new case. Contact your Firm Administrator to set up the accounts prior to starting the filing process.

Perform the following steps to file a new case:

1. Click the **NEW CASE** link.

The **Case Information** page opens.

2. Complete the details for the new case form using the drop-down list.

i Note: An asterisk indicates required fields.

To file an appeal on a case, select the **Appellate** case category from the **Select Category** drop-down list.

i Note: A lower court case number and court name is required to file an appeal.

3. Click the  button to save the case information and continue.

Note: Once you click the **Parties** button, a draft of the pages where all of the required fields have been completed is automatically saved. This feature allows you to stop work on a filing and resume the filing at a later time. To resume filing a saved draft, click the **WORKSPACE** link at the top of the page, find your case on the Filings screen, and click the **▶** icon.

Entering Party Details

Each case requires a party type.

Perform the following steps to enter the details for the parties involved in the case:

1. Click the **Parties** button from the **Case Information** page to enter the party details for the case.
2. Choose the party type by selecting either **Plaintiff** or **Defendant** under the **Party Type** column. You can also select the party type using the drop-down list in the **Party Type** field.
3. Enter the party information in the fields provided.

Note: An asterisk (*) indicates a required field.

You must complete all required information for the party types in the fields provided.

- a. Click I am this party to indicate you are the party.
- b. Select additional attorneys for the filing using the drop-down list under the *Add Additional Attorneys* section.

The (L) beside the attorney's name indicates a lead attorney, and the (+1 more) indicates the number of additional attorneys not shown. **Note:** If a case already exists in the case management system, the option to remove the assigned lead attorney is disabled.

- c. **Close** to close the window.
4. Select the country using the **Country** drop-down list.

Note: Foreign address fields are now added to the current data requirements of the

address block in system to allow for non-U.S. addresses.

The system will no longer allow selection of Mail Service for service contacts with non-US addresses.



- The following will apply when the country listed is Canada:
 - The **State** field will display as **Province**.
 - If **Provinces** are configured, then the **Province** field will consist of a drop-down list of Canadian codes; otherwise, the **Province** field will consist of a free-form text box.
 - The **City** field will display as **Municipality**.
 - The **Zip Code** field will display as **Postal Code**.
- The following will apply when other foreign countries are selected:
 - The **State** field will display as **Region**.
 - If **Regions** are configured, then the **Region** field will consist of a drop-down list with these codes; otherwise, the **Region** field will consist of a free-form text box.
 - The **City** field will display as **Municipality**.
 - The **Zip Code** field will display as **Postal Code**.

If you want to add another party to the filing, click the **ADD PARTY** button, and enter the party information in the required fields.

Note: When more than 100 parties are on a case, only the first party of each required party type will be displayed along with a message that additional parties are not displayed due to system constraints.

5. Click the **Filings** button to save the party details, or click the **Case Information** button to return to the previous screen.

Entering Filing Details

The **Filing Details** screen allows you to enter the filing details and calculate the fees associated with the filing.

Perform the following steps to enter the filing details for the case:

1. Click the **Filings** button from the **Parties** screen to enter the filing details.
2. Select the filing code using the **Select Filing Code** drop-down list.
3. Select the **E-File** check box to electronically file the case.
4. Select the **Service** check box to electronically serve the case.
5. Enter a brief description of the filing associated with the filing code previously selected in the **Filing Description** field.
6. Type the reference number of your choice that you can refer back to for this filing in the **Reference Number** field.

Note: A reference number is a customer created number and is for internal purposes only. Most courts do not see or refer to the reference number field for the filing. This is an optional field.

7. Select the parties to associate or disassociate with the case.
8. Select the lead document for this filing.
 - a. Click *Click to Browse or Drag Files Here* to select a lead document.

This opens Windows Explorer on your computer.

- b. Select a document to upload from the files on your computer.

Note: Only one document can be uploaded as a lead document.

- c. Click **Open** to attach the file.
 - d. Wait as the attachment uploads.

Note: Select the  icon to delete the uploaded attachment.

- e. Type a description of the uploaded attachment in the **Description** field.
 - f. Select a security option for the attachment.
9. Select the attachments to upload for this filing.
 - a. Click **Add More Documents** to select an attachment.

This opens Windows Explorer on your computer.

- b. Select the attachments to upload from the files on your computer.


Note: Multiple documents can be uploaded as attachments simultaneously.

The system provides a way to upload a file type that is not converted into PDF format. Users can download and view the files externally using the RTF document format.

The Auxiliary Filing feature enables filers to upload an editable RTF version of a document to the court. For example, many courts require documents to be in PDF format; however, a judicial officer may want an editable version of the document sent to court to be able to modify the document in the Proposed Orders. As a result, the filer would submit both the PDF and the RTF versions of the same document. The RTF version is used only if the judge is making changes to the filing.


Note: The system now allow uploads from Mac computers.

- c. Click **Open** to attach the file.
 - d. Wait as the attachment uploads.

Select the  icon to delete the uploaded attachment.

- e. Type a description of the uploaded attachment.
 - f. Select a security option for the attachment.
10. Enter the filing comments for the court reviewer to read in the **Filing Comments** field.
11. Type the email addresses of the parties to receive courtesy copies of this filing in the **Courtesy Copies** field.

12. Type the email addresses of the parties to receive preliminary copies of this filing in the **Preliminary Copies** field.

13. Select a due date using the  icon.

14. Review the filing fees located on the right side of the screen.

Note: Your credit card is authorized when submitted; however, the transaction fees will not post to the credit card account until the court accepts the filing. Once the filing is accepted, the total filing fee to be submitted for the filing is displayed.

15. Select a payment account to pay the filing fees.

16. Select a filer type for the payment account used to pay the filing fees.


17. Select the party responsible for the filing fees.



18. Select a filing attorney.

19. Enter the value of the estate in the **Estate Value** field.

20. Select the **Procedures/Remedies** check boxes for this filing.

21. Select the damages sought **Damages Sought** for this filing.



Note: To add another filing to the case, click the  button, and enter the filing details in the required fields.

22. Click the  button to save the filing details when you are done, or click the  button to return to the previous screen.

Selecting Contacts to Receive Service

The **Service Contact** screen allows you to select the contacts you want to receive service for the case.

Perform the following steps to select the service contacts to receive service:

1. Click the  button from the **Filings** screen to select the service contacts.
2. Select the check box next to the name of the service contact to add to the case, or click the  button in the middle of the window to add a new service contact.

Note: If there is no email address next to the name of the service contact, the contact cannot be served. You will need to add an email address or add a new service contact to the case.


The fields required to add a service contact is displayed.

3. Complete the **Add Service Contact** form by providing the applicable information.

Note: An asterisk (*) indicates required information.



4. Type an email address in the **Administrative Copy** field.

The administrative email is an optional additional email for the delivery of service. Delivery to this address is not considered a determining factor for the completion of e-service.

5. Select the **Make this contact Public** check box to make the contact public.
6. Select the **Save Contact in My Firm Master Service List** check box to save the contact to the firm's master service list.
7. Click the  button to save the contact.
8. Select the check boxes next to the service contact names you want to receive service.

To add service contacts from a master list or a public list, do the following:

- To add service contacts from the master list, go to [Adding Service Contacts from Master List, page .](#)
- To add service contacts from the public list, go to [Adding Service Contacts from Public List, page .](#)


9. Click the  button to save the selected contact and view the case summary, or click the  button to return to the previous screen.

Viewing the Case Summary

The **Summary** page displays the case information, parties involved in the case, filing details, fees, payments, and filing attorney for the case.



The **Parties** and **Filings** pages must be complete before you can view the case summary. A payment account must be assigned to the case to complete the filing process.

Perform the following steps to view the case summary:

1. Click the  button from the **Filings** screen to view the case summary.

The **Envelope and Filings Summary** window opens. Here, you can view the **Case Information**, the **Parties** involved in the case, the **Service Contacts**, the **Filing** codes, the filing **Fees**, the **Payment** accounts, and the **Filing Attorney** for the case.

Note: The system now prevents users from changing an envelope that has already been submitted.

2. Click the  button to submit your filing, or click the  button to take you back to the **Filings** screen.

Technical Support Contact Information

The File & Serve Technical Support Team is available to assist all users by calling 800-297-5377 Monday through Friday between the hours of 7 a.m. to 9 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an email to efiling.support@tylertech.com or by using the [Support Chat](#) option.

Support may ask to assist you by sharing your screen using [GoToAssist](#).