

File & Serve *Xpress*™

Multi-Case Filings - User Guide



File & ServeXpress

Multi-Case Filings

Table of Contents

Multi Case Filings Overview.....4
Filing & Service Tab5
Start A Transaction Queue.....6
Documents Tab8
Sending Parties Tab10
Service Tab.....11
Additional Recipients Tab13
Review & Submit Tab.....14
Transaction Receipt/Report.....17

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** <https://secure.fileandservexpress.com/Login/Login.aspx> is where you can find password help, what's new and any important information like scheduled maintenance or system changes.
- **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.

Multi Case Filings Overview

The File and ServeXpress Quick Guide provides a convenient source of information to help you efficiently file and serve your documents into more than one case.

Before You Begin

1. Refer to the appropriate court rules on electronic filing prior to using File & ServeXpress to ensure you are in compliance with local requirements. Copies of the rules can be found on the **Resource Center** once logged into the application.
2. Check our minimum system requirements to be sure your computer is correctly configured for using File & ServeXpress.
3. All tables are sortable. Any time a grid or table appears, click the column headings to sort by that information.
4. Hyperlinks take you to additional information – don't forget to use them!
5. When running searches, less is more. Enter only partial information to get the most results.
6. The fastest way to access a transaction is with a Transaction ID.
7. When using File & ServeXpress for the first time, or if you need assistance, call our 24/7 Client Support line at 1-888-529-7587.

Signing on to File & ServeXpress:

File & ServeXpress™
The e-Filing & e-Service Experts™

Sign In to File & ServeXpress™

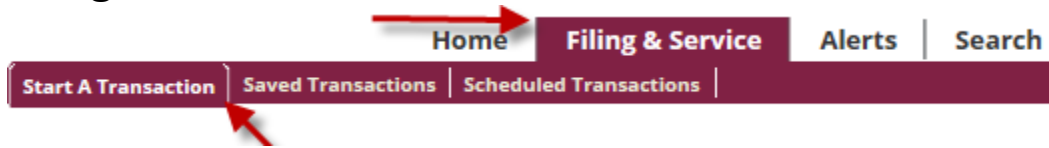
Sign In

[Forgot Password](#) | [Reset Password](#)

Need more help?
Call Customer Support at 1-888-529-7587

1. Before using File & ServeXpress, you must have an ID and password. If you do not have these, contact Client Support.
2. Open your internet browser and go to <https://fileandservexpress.com>
3. Enter your assigned ID and password and click **Sign in**.

Filing & Service Tab



There are 7 easy steps to submitting documents into multiple cases using the File & ServeXpress “Filing & Service” tab. Each of these steps is detailed in this guide:

1. **Start A Transaction Queue-** Allows you to select a case to E-file and/or E-serve into.
2. **Case Tab-** Lets you look at the list of cases you have selected to submit documents into.
3. **Documents Tab-** Lets you select the type of document you are submitting and attach your documents.
4. **Sending Parties Tab-** Allows you to select the client for which you are submitting the transaction.
5. **Service Tab-** Allows you to select the recipients of the transaction you are submitting.
6. **Additional Recipients Tab-** Lets you send the transaction to recipients not on the service list (i.e. your client or co-counsel).
7. **Review & Submit Tab -** Allows you to review your work and submit the transaction to the court and other parties.

Filing & Service Tab Tips:

- ✓ **Saved Transactions Queue:**
Saved Transactions The *File & ServeXpress* system is designed to save your work as you go. If you lose connectivity or power for any reason, check your Saved Transactions to resume work on an unfinished transaction.
- ✓ **Scheduled Transactions Queue:**
Scheduled Transactions *File & ServeXpress* allows users to schedule submittals of transactions for future dates and times. Users can update/delete these transactions in the Scheduled Transactions queue up to the date and time they are scheduled to be submitted.

Start A Transaction Queue

To E-file and/or E-serve into an Existing Case, follow these steps:

1. To begin the filing/serving process, click the **Filing & Service** tab. The *Start A Transaction* queue appears.
2. Click the **File and/or Serve in multiple cases** radio button.

3. From the drop down menu, select the court in which you choose to file. Click **Find**.
4. All available cases will appear in a list:

Select cases and click **Begin Transaction**.

Case List **Begin Transaction** View Selected Create Case Group

1 through 15 of 15 Show 50 results per page

Case Number	Case Name	Case Type	Case Class	State	Court
007654321	Smith, James vs D E F Corp	Personal Injury	Civil	WA	Mock Court-Filing & Serving
30-2013-00676733-CU-OR-CJC	Adams vs ABC Trucking	Personal Injury	Civil	WA	Mock Court-Filing & Serving
2013L 999991	John, Smith vs Acme Corp et al	Personal Injury	Civil	WA	Mock Court-Filing & Serving
2013CV998877	Test A vs Test B	Non-Arbitration	Civil	WA	Mock Court-Filing & Serving
2013-ab-07-44	Smith vs Jones	Personal Injury	Civil	WA	Mock Court-Filing & Serving
2012L000123	Johnson, John vs XYZ Corp et al	Personal Injury	Civil	WA	Mock Court-Filing & Serving
2013-09-999991-888	Doe, John vs A B C Corp	Personal Injury	Civil	WA	Mock Court-Filing & Serving
2012 NA 0001-8888	Doe, James et al vs John Smith et al	Non-Arbitration	Civil	WA	Mock Court-Filing & Serving

Filing Into Multiple Cases Tips:

- ✓ Note that you can also search for cases by searching a partial case name or case number, clicking the Find button and checking that case and repeating the process for any other case you wish to add. This is helpful if you are adding a few cases or if your Court has an exceptionally large amount of cases available for filing into.
- ✓ Note that you can also enter a partial case name or case number if you are searching for specific cases

- To select cases, click the box to the left of the desired case numbers.
- Click **Begin Transaction**, located at the top of the list of cases.
- The page will refresh and several additional tabs will appear. The Documents Tab will appear by default. To view your cases or add additional ones, click on the Cases Tab:

Home | **Filing & Service** | Alerts | Search

Start A Transaction | Saved Transactions | Scheduled Transactions |

1/18/15 10:07 PM CST | Case | Documents | Sending Parties | Service | Add'l Recipients | Review & Submit

Select Multiple Cases | Transaction ID: 54691175 | Cancel | Save & Close

Court: Mock Court-Filing & Serving | Case Class: Civil | Selected Cases
 All Cases

Case Name:
Case Number:

Find | View Case Groups | Advanced Search | ?

Click **Add Cases** to save changes.

Case List | Add Cases | View Selected | Create Case Group |

1 through 3 of 3 | Show 50 results per page

<input type="checkbox"/>	▲ Case Number	Case Name	Case Type	Case Class	State	Court	County
<input checked="" type="checkbox"/>	15CV12345	Smith, James vs A B C Auto Inc	Personal Injury	Civil	WA	Mock Court-Filing & Serving	
<input checked="" type="checkbox"/>	15cv4321	Jackson, Jane vs X Y Z Industrials Inc	Personal Injury	Civil	WA	Mock Court-Filing & Serving	
<input checked="" type="checkbox"/>	987654321	Smith, James vs D E F Corp	Personal Injury	Civil	WA	Mock Court-Filing & Serving	

1 through 3 of 3

Filing Into Multiple Cases Tips:

- ✓ Create Case Group Button:
Create Case Group This button allows you save your group selection as a “Case Group” for future transactions. After selecting your cases, type the name of your group in the space provided at the top of the list and click **Create Case Group**.
- ✓ View Case Groups Button:
View Case Groups To Select a Case Group click **View Case Groups**. A list of your firms Case Groups will appear. To select a Case Group for filing, click the arrow button beside the group name. Once a case group has been created it can be used by all users at the firm.

Documents Tab

Start A Transaction | Saved Transactions | Scheduled Transactions |

Case | **Documents** | Sending Parties | Service | Add'l Recipients | Review & Submit

Attach Documents | Transaction ID: 54691175 | Cancel | Save & Close

Multi-Case | Mock Court-Filing & Serving

For each document, complete each field and click **Attach Document**.

Type: Select a Document Type or Check here to fax your document Statutory Transaction Fee: None

Access: Public Public - These documents are electronically submitted and available for viewing by File & ServeXpress customers.

Title:

Maximum length of text is 510 characters

1. Select a Document Type for your document using the drop down menu entitled **Type**.
2. To attach your document, click the **Browse** button.. A dialog box will open. Locate the file you saved to your hard drive or network and double-click.
3. Enter the title in the *Title* field. The title should comply with local rules for e-filing.
4. Select an access type for your filing – access is defined by each court but may include:
 - **Public:** The document is a publicly filed instrument.
 - **Filed Conventionally:** Some courts use this option as a placeholder in the electronic docket to indicate that documents have been filed in paper at the Court.
 - **In camera:** Documents designated as in camera are only viewable by the Judge on the case. Other court personnel, attorneys or firms on the case cannot access in camera documents.
 - **Sealed:** Sealed documents may be handled in one of two ways, depending on how the receiving court has opted to handle sealed instruments:
 - a. The sealed document can be attached to the e-filed transaction and only available online to the court and served parties.

Documents Tab Tips:

- ✓ **Transaction ID:** This number is the tracking number for this transaction and can be used to view the details of the transaction within the File & ServeXpress system.
- ✓ **Cancel Link:** This function will purge the entire transaction from the system.
- ✓ **Save & Close Link:** This function will save all information for this transaction in the Saved Transactions queue until the transaction is resumed.
- ✓ If you have documents to upload that are not in electronic format, you may select the *Check here to fax your document* box. For detailed information on how to fax documents to File & ServeXpress, click the blue box.
- ✓ *Please note that additional charges will apply if you choose to use the fax filing feature.*

- b. The court may require that the documents be filed in hard copy with the court and that a placeholder be e-filed into the electronic docket.

5. Click **Attach Document**. The document will appear in the *Attached Documents* list:

Attached Documents List [Click here to refresh document conversion status](#)

ID	Document Type	Access	Conversion Status	Main/Supporting	Linked To:	Modify	Remove
57867919	Answer	Public	Converted	Main ▾	None Edit Link	Modify	Remove

Document Title: [Defendant A B C Auto's Answer to Plaintiff James Smith's Complaint](#)

- 6. To add more documents, repeat steps 1-5.
- 7. When filing supporting documents, use the *Main/Supporting* feature to reflect the association. In the column next to each supporting document, select the document ID for the main document to which it supports.
- 8. If you need to remove a document, click the *Remove* link next to the document you wish to delete from the Filing.
- 9. When all of the documents have been attached and associated, click the **Sending Parties** tab to continue.

Documents Tab Tips:

- ✓ When uploading your documents, you can check the document by clicking on the hyperlinked Document Title in the *Attached Documents* list.

Attached Documents List [Click here to refresh](#)

ID	Document Type	Access	Conversion Status	Main/Supporting
57867919	Answer	Public	Converted	Main ▾

Document Title: [Defendant A B C Auto's Answer to Plaintiff James S](#)

- ✓ When filing supporting documents, you can use the *Main/Supporting* feature to reflect the association. In the column next to each supporting document, select the document ID for the main document to which it supports.

Attached Documents List [Click here to refresh](#)

ID	Document Type	Access	Conversion Status	Main/Supporting
57867919	Answer	Public	Converted	Main ▾
Document Title: Defendant A B C Auto's Answer to Plaintiff James S				
57868054	Counterclaim	Public	Converted	Main ▾ 57867919
Document Title: Defendant A B C Auto's Counterclaim against Plain				

Sending Parties Tab

- To select the party or parties you represent in this case place a check in the box next to the party name in the *Parties Available for Selection* list.

Parties with Representation Available for Selection.
Any attorney additions to cases will remain in Pending status until the court accepts your transaction.

Party	Party Type	Party Status	Attorney
<input checked="" type="checkbox"/> Bob's Towing	Defendant	Active	Lawyer, Lucy
<input type="checkbox"/> Contrary, Mary	Defendant	Active	Litigator, Larry
<input type="checkbox"/> G H I Corp	Defendant	Active	Lawyer, Lucy
<input type="checkbox"/> Marcus, Mark	Defendant	Active	Litigator, Larry
<input checked="" type="checkbox"/> Smith, John	Defendant	Active	Lawyer, Lucy
<input type="checkbox"/> Tonys Towing	Defendant	Active	Litigator, Larry

- Click the **Service** tab to continue.

Sending Parties Tab Tips:

- ✓ **Adding a Party to a Case:** If the party you are trying to file for is not available in either the represented or unrepresented parties' lists, you may be able to submit an Add Party request with your transaction. If the court you are filing with allows this type of request with your transaction, click the **Add Party** button. Details for adding a party while filing are included on page 23 of this guide.

✓ **Create Custom Group**

You can save your selection as a **Custom Group** for future transactions. After selecting your parties, type the name of your group in the space provided, then click **Create Custom Group**.

✓ **Custom Groups**

To use a custom group click **Custom Groups**. A list of your custom groups will appear. Select the custom group you wish to use for Sending by clicking the check mark box beside the name.

Service Tab

- To select a party/parties to receive **Service** place a check in the corresponding box in the Service column next to the party names.

1/18/15 11:45 PM CST Case Documents Sending Parties **Service** Add'l Recipients Review & Submit

Select Recipients Transaction ID: 54691178 Cancel Save & Close

Multi-Case Mock Court-Filing & Serving

Search Custom Groups Add Party/Attorney ?

Select a delivery option for each party you want to add. "Service" is official legal service of the document upon the selected party. To remove a selected party, deselect service.

YOUR ORGANIZATION WILL INCUR ADDITIONAL POSTAGE AND COPYING FEES FOR SERVING PARTIES DESIGNATED FOR SERVICE VIA US MAIL OR FAX. CHECK THE ADDITIONAL SERVICES PRICING SHEET IN THE [RESOURCE CENTER](#) FOR COMPLETE COSTS.

Create Custom Group

Show 10 entries

Service <input type="checkbox"/>	Party	Party Type	Party Status	Attorney	Firm	Method
<input checked="" type="checkbox"/>	+ Acme Motor Co	Petitioner	Active	Attorney, Adam	Mock Firm A-Bellevue	EService
<input checked="" type="checkbox"/>	+ Acme Motor Co	Petitioner	Active	Associate, Andrew	Mock Firm A-Bellevue	EService
<input type="checkbox"/>	+ Acme Supply Co	Defendant	Active	No Answer on File	Firm TBD	UsMail
<input type="checkbox"/>	+ Acme Supply Co	Defendant	Active	Contingent, Christopher	Contingent Law Firm A	UsMail

- To select all parties, click the box below service on the gray header bar.
- The Method column shows the method of service (e-Service, US Mail, Fax).
 - If the recipient is a registered user of File & ServeXpress, then the documents or notice will be delivered to their **online** account.
 - If the recipient is not a registered user, then the documents will be delivered via traditional methods (US Mail or Fax) depending on the rules of service for that particular Court.

Service Tab Tips:

- ✓ **Serving Pro Se Parties:** If available in the court you are filing in, you may be able to serve a Pro Se or Pro Per party by typing in a U.S. Mail delivery address. You will be prompted to enter an address for each Pro Se or Pro Per party you select to serve via regular U.S. Mail.
- ✓ The most recently used addresses will display for each party you have selected to serve. You can use the address provided or enter your own address. The source of the information will appear in the *Entered By* field.
- ✓ You can opt to share this address with other E-filers, or you can mark it as "private" so that it will be available only to your firm.
- ✓ If you do not want to serve the Pro Se party, click the **Do Not Serve This Party** radio button.
- ✓ Service to a Pro Se/Pro Per party via File & ServeXpress will be completed via regular U.S. Mail and is not guaranteed if the information you provide is not accurate.

4. If a checkbox does not appear for you to select, then you cannot use File & ServeXpress as a delivery method to send documents to that party. You will have to send service to that party via traditional means.
5. Click the **Additional Recipients** Tab to continue.

Service Tab Tips:



Create Custom Group

You can save your selection as a **Custom Group** for future transactions. After selecting your parties, type the name of your group in the space provided, then click **Create Custom Group**.



Custom Groups

To use a custom group click **Custom Groups**. A list of your custom groups will appear. Select the custom group you wish to use for Sending by clicking the check mark box beside the name.

Additional Recipients Tab

Start A Transaction | Saved Transactions | Scheduled Transactions

Case | Documents | Sending Parties | Service | **Add'l Recipients** | Review & Submit

Select Additional Recipients Transaction ID: 54691178 [Cancel](#) [Save & Close](#)

Multi-Case **Mock Court-Filing & Serving**
 Enter a few characters in Last Name, Email, or Organization, and click **Find** to search for available recipients. If your search is unsuccessful, you may change your criteria and try again, or choose to **Create Additional Recipient**

First Name Last Name
 Email Organization

[Find](#) [Clear](#) [?](#)

1. The system requires a user to initially “search” for an additional recipient before being given the option to create a new additional recipient.
2. Search results will display both File & ServeXpress subscribers and non-member users.
3. If no results appear, click the Create Additional Recipient button.
4. Enter both a First and Last Name and will then select either “Online” or “Fax” as the delivery method.
5. After entering a new Additional Recipient, the system will then create a non-member “account” for the additional recipient. The recipient will receive an email with an ID/Password for the sole purpose of retrieving the documents in your transaction. Instructions will be included.
6. That non-member account will now appear in the search results when filers search the name and will display the notification method previously entered for the additional recipient non-member.

Service Tab Tips:

- ✓ If no results or inaccurate results appear for the search, then the user will see a button to “Create Additional Recipient”.

Start A Transaction | Saved Transactions | Scheduled Transactions

Case | Documents | Sending Parties | Serv

Select Additional Recipients

Multi-Case **Mock Court-Filing & Serving**
 Enter a few characters in Last Name, Email, or Organization, and click **Find** to search for choose to **Create Additional Recipient**

First Name [Find](#)
 Email

Select each person you want to add as an additional recipient and, for each, indicate the

1 through 5 of 5 [Add to Recipient List](#) [Create Additional Recipient](#) [Sho](#)

Select	Send	First Name	Last Name	Organization
<input type="checkbox"/>	<input checked="" type="radio"/> Online <input type="radio"/> Fax	Janet	Jones	Gardere Wynne Sewell LLP-Dallas
<input type="checkbox"/>	<input checked="" type="radio"/> Online <input type="radio"/> Fax	Janet	Jones	Huddles Jones Sorteberg & Dachille Pc

Review & Submit Tab

Home | Filing & Service | Alerts | Search

Start A Transaction | Saved Transactions | Scheduled Transactions

Case | Documents | Sending Parties | Service | Add'l Recipients | Review & Submit

Authorize Transaction | Transaction ID: 54691178

Multi-Case Mock Court-Filing & Serving

Select an attorney to authorize this transaction.

Authorizing Attorney:

1. Select an authorizing attorney from your office in the dropdown list.

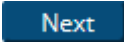
Delivery Options: What do you want to do with this transaction? (pick one)

- File with the court and Serve selected parties
 - I am sending these documents as "Court-Appointed Counsel/ADR".
- Serve Only - Private (available only to sending firm and served firms)
- Serve Only - Public (available to anyone to purchase from LexisNexis(tm) File & Serve, except in e-service only jurisdictions and subject to case security policies).

2. Select a delivery option from the following options:
 - **File and Serve:** The transaction will be filed with the court and served to all designated recipients. It will be available to be viewed and purchased by registered File & ServeXpress users as a publicly-filed instrument.
 - **Serve Only – Private:** Sends the transaction ONLY to your selected service recipients. The document IS NOT filed with a court. It is not available to any registered File & Serve users that you did not select for service, and may not be viewed or purchased as a publicly filed document.

- **Serve Only – Public:** Sends the transactions ONLY to your selected service recipients. The document IS NOT filed with a court. The document is available to be searched, viewed, printed and purchased by any registered File & ServeXpress users as a publicly available document unless the transaction is submitted in a Service Only jurisdiction. If the document is served in a Service only jurisdiction, the document is only viewable by other users within the same litigation.

Add billing reference. This reference will appear on your invoice.

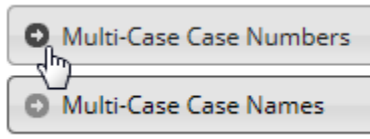
3. Enter any billing information you want included on your invoice.
4. If you would like to pre-order a “Read Status” report that shows when an e-served recipient opened the transaction, click the box as shown. (A one-time fee applies – anyone in firm can access thereafter as often as they want). You can choose to authorize and file your documents now, or you may choose to enter a future date and time for the document to be automatically sent.
5.  Click **Next** to proceed with Filing. The final review page will appear.

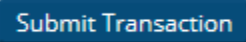
Start A Transaction Saved Transactions Scheduled Transactions						
1/18/15 3:25 AM CST	Case	Documents	Sending Parties	Service	Add'l Recipients	Review & Submit
Review and Submit						Transaction ID: 54691178
Multi-Case Mock Court-Filing & Serving						
IMPORTANT: Your transaction has not yet been submitted.						
When you have finished reviewing, select Submit Transaction below.						
File & ServeXpress Transaction ID:			54691178			
Submitted by:			Lucy Lawyer, Mock Firm B			
Authorized by:			Lucy Lawyer, Mock Firm B Edit			
Court:			Mock Court-Filing & Serving			
Division/Courtroom:			3 - Division 3			
Case Class:			Civil			
Case Type:			Non-Arbitration			

Review & Submit Tab Tips:

- ✓ **Read Status:** To access this report after the transaction is completed, go the Transaction Details from anywhere in the application, scroll down to the “Read Status” link, click the link and you will see the report – which is printable. If you did not pre-order the Read Status during the transaction process, you will be prompted with the fee after clicking the Transaction Details.

6. Review the summary information. There will be clickable drop-down sections for Case Names, Case Numbers, Sending Parties and Recipients. Click on the arrows in each text box to review this information.



7. To make any changes to your information, click the edit link provided in that section or click the tab containing the information to be changed.
8.  When the information has been verified and you are ready to proceed, click **Submit Transaction**.

Review & Submit Tab Tips:

- ✓ **Note:** When submitting into multiple cases you have the option to expand the case name and number to view the original case name and numbers into which you are submitting the transaction. You may do this by clicking the arrow in **Case Name** or **Case Number** field.

Transaction Receipt/Report

[Home](#) | [Filing & Service](#) | [Alerts](#) | [Search](#)

[Start A Transaction](#) | [Saved Transactions](#) | [Scheduled Transactions](#)

1/18/15 4:00 AM CST


File & ServeXpress Transaction Receipt

File & ServeXpress Transaction ID: 54691178
Submitted by: Lucy Lawyer, Mock Firm B
Authorized by: Lucy Lawyer, Mock Firm B
Authorize and file on: Jan 18 2015 11:48PM CST

- Once you click the Submit tab, the page will refresh and you will see a Transaction Receipt. You may print this receipt off for your records or search for it on File & ServeXpress by Transaction ID in the future.
- [transaction report](#). You may order a “Transaction Report” after the transaction is submitted. This report is a comprehensive, up to the date, document that will provide all of the transaction details, including Clerk & Judge review (if applicable) -- with the option of ordering the “read status” as well. Simply click the link on the top that says “transaction report”.

Transaction Receipt/Report Tips:

- ✓ **Sample Transaction Report:**



File & ServeXpress
 December 18, 2012
 Max Powers
 Mock Appeals Firm B-Demo
 13427 NE 16th St
 Bellevue, CA 98005
 RE: File & ServeXpress Transaction No. 42724428

Dear Customer:

The following information for File & ServeXpress Transaction 42724428 reflects the details of the transaction contained in the File & ServeXpress system as of December 18, 2012 10:02:34 AM MST.

Lisa Lawyer, authorized by Lisa Lawyer, submitted Transaction 42724428 on February 27, 2012 09:25:57 AM MST to CO Mock County District Court, via File & ServeXpress for the following case:

Case Number	Case Name	Division	Judge
2012CV227	In the Matter of Charles Harris	2 - Division 2	Judge District

The Transaction contained 1 document titled as follows:

ID	Document	Pages	Clerk Review Status
54691178	Petition to Seal Criminal Record	1	Accepted 02/27/2012 09:30:30 AM MST

The above-mentioned documents within this Transaction were sent to the following 0 recipients:

Should you have any questions about the details of the Transaction as stated above, please contact Customer Support at 1-888-529-7587.

Sincerely,
File & ServeXpress Holdings, LLC

Page 1 of 1