

# File & Serve *Xpress*™

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## Document Upload - User Guide



# **File & ServeXpress**

## **Document Upload**

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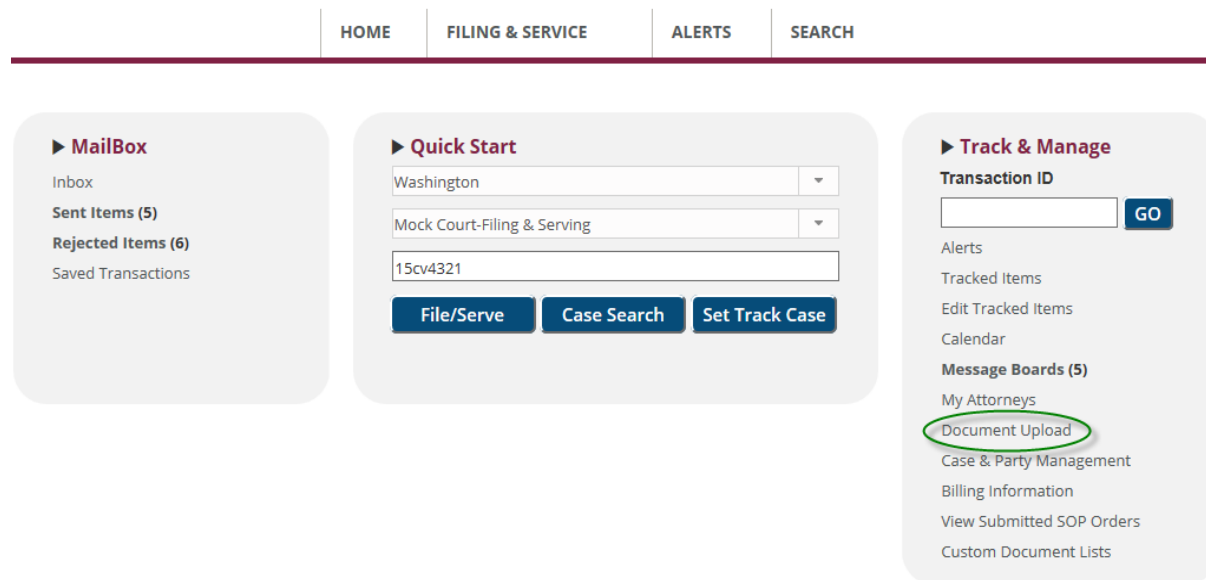
## **File & ServeXpress Resources**

**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** <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.

## Document Upload Overview

All law firm users have access to the **Document Upload** feature, which is available in the Track & Manage section of the File & ServeXpress home page.



This feature gives firms the ability to upload “private” documents that are related to the case but are not already a part of the electronic case history so that firms can have access to them via File & ServeXpress.

All documents uploaded using this feature are only viewable by the uploading firm. **Document Upload** will be beneficial to firms that would like to use File & ServeXpress as a document management system or would like to have a truly “complete” online case file.

### Document Upload Tips:

- ✓ **Pricing:** This is a premium feature and there is a per-transaction price of \$1.00/upload for the firms. **Note:** ALWAYS CHECK THE FILE & SERVEEXPRESS RESOURCE CENTER FOR MOST UP-TO-DATE PRICING
- ✓ **Limitations:** There is no “scan-on-the-fly” option for the law firm Document Upload. In order to upload a document in this feature, the firm must already have an electronic copy of the document. There is also **no file size limitation** on Document Upload transactions.
- ✓ **Access Level:** Document Upload transactions are private to the uploading organization and only that organization can view these transactions on the system.



## Document Upload

1. Click the **Document Upload** link.
2. Use the drop down menus and open field to select **Jurisdiction (State), Court and Case Number** for which you would like to upload a document.
3. Click the “Find Case” Button.

### Document Upload

Upload a document for your organization.

\* *Required fields*

#### Case Information:

Select a Jurisdiction and Court and enter Case Number information. Click **Find Case** to search and select a case.

\* Jurisdiction:

\* Court:

\* Case Number:

**Find Case**

**Cancel** **Submit Document**

**Case Information:**  
 Select a Jurisdiction and Court and enter Case Number information. Click **Find Case** to search and select a case.

\* Jurisdiction:

\* Court:

\* Case Number:

Show  records 1-1 of 1 Cases <<Prev Page 1 of 1 Next>>

<u>Case Number</u>	<u>Case Name</u>	<u>Case Status</u>
<input checked="" type="radio"/> <a href="#">15CV12345</a>	Smith, James vs A B C Auto Inc	Active

1-1 of 1 Cases <<Prev Page 1 of 1 Next>>

4. Choose the radio button next to the correct case and click the “Select Case” button.
  - a. The system will only display search results based upon whether the organization is either an active case participant or had been a case participant.
  - b. If a firm has been withdrawn or dismissed from a case on File & ServeXpress, they will still be able to upload documents into that case if desired.

**\* Sending Party:**

<input type="checkbox"/> <u>Party</u>	<u>Type</u>	<u>Status</u>	<u>Attorney</u>	<u>Firm</u>
<input type="checkbox"/> Smith, James	Plaintiff	Active	Attorney, Adam	Mock Firm A-Bellevue
<input type="checkbox"/> N/A	N/A	Active	Brown, Judge	Mock Court-Filing & Serving
<input checked="" type="checkbox"/> A B C Auto Inc	Defendant	Active	Lawyer, Lucy	Mock Firm B

5. Use the Radio Buttons to choose a “Sending Party” to designate the party of which the document is attributed to.

**Document Details:**  
Enter the document details below.

\* **Date Filed:**  (mm/dd/yyyy)  (hh:mm AM/PM) CST

\* **Document Type:**

\* **Document Security:**

Private Upload documents are only available to users in the uploader's organization.

\* **Document Title:**

Maximum text length is 510 characters \$1.00

\* **New Document:** Click **Browse** to select a file from your computer or network and then click **Attach Document** to upload

6. Enter a date (the system will default to the current date and time, but the user can post-date the document – you cannot enter a future date).
7. Select a Document Type.
8. The Document Security on this feature is a default of “Private Upload” – the user cannot override that default.
9. Enter a Document Title to describe the document.
10. Browse your personal hard drive for the document to upload.

## Document Upload Tips:

- ✓ **Document Type:** this drop-down menu will contain the full list of document types enabled for the court and case that is selected, allowing users to designate a document type that is normally a Court-issued document.
- ✓ **Document Security- Private Upload:** Private Upload documents are only available to users in the uploader’s organization.
- ✓ **Billing Reference:** If a Billing Reference is entered it will appear on the firm’s monthly invoice. The Billing Reference fee can be set as mandatory for the firm through the Organization Administrator’s Preferences section.
- ✓ **Replacing a Document:** If the incorrect document is selected, click on the [\[remove\]](#) link to choose a different document.
- ✓ **Size Limitations:** There is no limit to the size of documents that can be uploaded using the Document Upload feature.



11. Click "Attach Document".
12. Enter a Billing Reference.
13. Click "Submit Document".
14. After the document is uploaded to the system, you will receive a transaction receipt.

[Home](#) > [Document Upload](#) > [Transaction Receipt](#)

Your document has been successfully uploaded to File & ServeXpress.

To perform another transaction, click **Upload Another Document**.  
To exit, click **Return to Home**.

**Details:**

<b>Authorized by:</b>	Lawyer, Lucy
<b>Submitted by:</b>	Lawyer, Lucy
<b>Court:</b>	Mock Court-Filing & Serving
<b>Case:</b>	<a href="#">15CV12345</a> Smith, James vs A B C Auto Inc
<b>Filed On:</b>	1/19/2015 3:29 AM CST
<b>Filing Option:</b>	Document Upload

**New Document:**

<b>Document ID:</b>	57868367
<b>Document Type:</b>	Motion
<b>Document Security:</b>	Private Upload
<b>Document Title:</b>	Defendant's Motion to Dismiss <a href="#">[view]</a>
<b>Transaction ID:</b>	54691376

**Sending Party:**

<b>Party:</b>	A B C Auto Inc
<b>Type:</b>	Defendant
<b>Status:</b>	Active
<b>Attorney:</b>	Lawyer, Lucy
<b>Organization:</b>	Mock Firm B

[Return to Home](#)

[Upload Another Document](#)



## Searching for “Document Upload” Documents

Because Document Upload transactions are private to the uploading organization, only that organization can view these transactions on the system. While Document Upload transactions can be viewed through any of the Searches on File & ServeXpress, the Case History search is the only one that has a specific radio button filter that allows the organization to view only their uploaded documents or all documents (including the Document Upload Transactions). Selecting this radio button will only provide “Document Upload” documents in the search results.

### 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:

\* Court:

\* Filter:  My Transactions  Transactions in My Firm's Cases  All Transactions

Case Number:  Case Name:

or

Case Group Name:

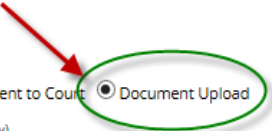
with

\* 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



By selecting “All Documents” as the Transaction Option in Case History, the user will be able to see the entire docket including “Document Upload” transactions.

## Document Upload Tips:

- ✓ **Document Access:** Only the organization that uploaded the document can view it.

All Document Upload transactions will appear for the uploading organization when they run a search and request “All Documents”.

Transactions will only appear in the results for Case History, Advanced Search, and Quick Find / Quick Case.

When Attorneys on cases that contain privately uploaded documents leave a firm, the Document Upload transactions WILL REMAIN with the organization that uploaded the document– the Document Upload transaction will NOT “move” with the attorney to their new organization.

- ✓ **Billing Reference:** The Organization Administrator for a law firm can make the Billing Reference for this Document Upload mandatory under the *Mandatory Billing References* section in Preferences.

Submitted By: [Court](#) [Plaintiff](#) [Defendant](#)

**Case History Search**  
Search Created: [Printable Version](#)  
1/19/2015 04:41:24 GMT-0500 (Eastern Standard Time)

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**Court:** Mock Court-Filing & Serving      **Judge:** Brown, Judge      **File & ServeXpress Live Date:** 1/13/2015  
**Division:**      **Case Number:** 15CV12345      **Document(s) Filed:** 1  
**Case Type:** Personal Injury      **Case Name:** Smith, James vs A B C Auto Inc      **Date Range:** All

Choose an action: -- Select --  Show  records

1 transaction <<Prev Page 1 of 1 Next>>

<input type="checkbox"/>	Transaction	Date/Time	Option	Case Number Case Name	Authorizer Organization	#	<input type="checkbox"/>	Document Type	Document Title	Review Status	Size
<input type="checkbox"/>	<a href="#">54691376</a>	1/19/2015 3:29 AM CST	Document Upload	<a href="#">15CV12345</a> Smith, James vs A B C Auto Inc	Lucy Lawyer, Mock Firm B		<input type="checkbox"/>	Motion	Defendant's Motion to Dismiss <a href="#">[view]</a>	N/A	0.1MB

1 transaction <<Prev Page 1 of 1 Next>>

## Document Upload Tips:

- ✓ **Multiple Cases/Documents:** Documents can only be uploaded into one case at a time.

The feature also only allows the user to upload one document at a time.

There is no option to upload the same document into multiple cases.

- ✓ **Availability Limitations:** The Document Upload feature is not available to Third Party Filers as they are not considered activate case participants.