

File & Serve *Illinois*™

# Overview

## User Dashboard



# AGENDA

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File & Serve *Illinois* has many resources available to you in order to address your questions and concerns:

- **File & Serve *Illinois* Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 888.529.7587. They are available 24/7/365.
- **File & Serve *Illinois* Resource Center** is available to assist you with How-To Guides, register for Live Webinars, watch On-Demand videos, and much more! Please visit <http://fileandservexpress.com/illinois/training.html> for more information.

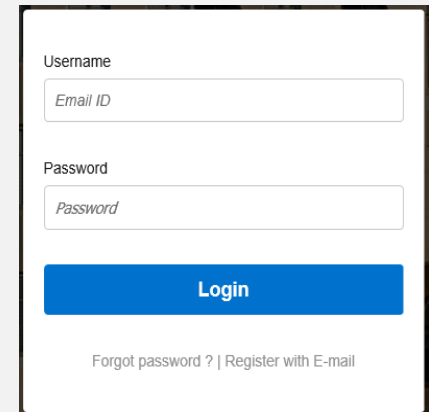
# SUBSEQUENT FILING OVERVIEW

The File & Serve *Illinois* User Guide provides a convenient source of information to help you efficiently eFile into an existing case.

## Before You Begin

1. Refer to the appropriate court rules on electronic filing prior to using File & Serve *Illinois* to ensure that you are in compliance with local requirements.
2. Check our minimum system requirements to be sure your computer is correctly configured for using File & Serve *Illinois*.
3. If you need assistance, call our Client Support line at 1-888-247-2051. They are available to help you 24/7/365.

## Logging in to File & Serve *Illinois*

A screenshot of the File & Serve Illinois login interface. It features two input fields: 'Username' with a placeholder 'Email ID' and 'Password' with a placeholder 'Password'. Below these fields is a blue 'Login' button. At the bottom, there is a link that reads 'Forgot password ? | Register with E-mail'.

1. Open IE, Chrome, or Firefox go to [www.fileandserveillinois.com](http://www.fileandserveillinois.com).
2. Enter your Username and Password and click **Login**.
3. If you do not have a Username/Password, please contact your Firm Administrator.

# SUBMIT A NEW FILING

This Tab is used to submit a new case filing or file a subsequent transaction into an existing case. For more information on filing and serving documents, see our File & Serve Illinois user guides titled, “New Case Filing” and “Subsequent filing”.

File & Serve *Illinois*™

Training Admin

Filing

Firm Admin

Case Details

STEP 1 - Case Type

STEP 2 - Parties

STEP 3 - Documents

STEP 4 - Service Contact

STEP 5 - Review & Submit

Is this filing for an existing case?

No

Case Type

Select

Jurisdiction

Select

Payment Account

Select

Case Category

Select

Attorney

Select

Client Matter ID

Next

# COMPLETED FILINGS

You will be able to view the Transaction Summary by clicking on the “**eyeball**” icon next to the envelope under “**Search Results.**” You will be able to print the Transaction Summary.

Completed Filings

+ New Filing

Search

Select a Jurisdiction

From Date (mm/dd/yyyy)

To Date (mm/dd/yyyy)

Sort By

Filing Type

Case Category

Filing Code

Case Number

Envelope ID

Filing Status

Go

Clear All

Search Results




Need [process service](#), [skip trace](#) or [courtesy copies](#) ?

Show

25

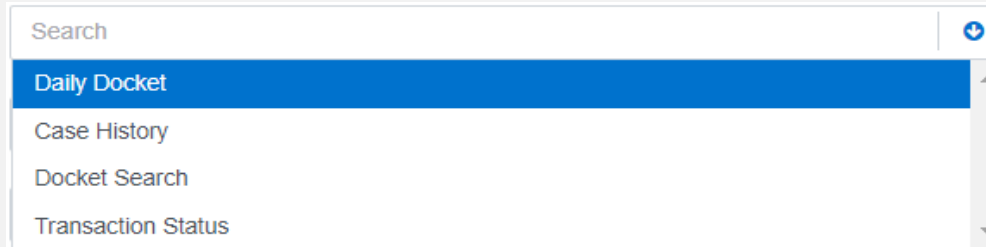
filings per page

Search

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
69084		2018SC123456	Clark County	06/27/2018	Training Admin	  

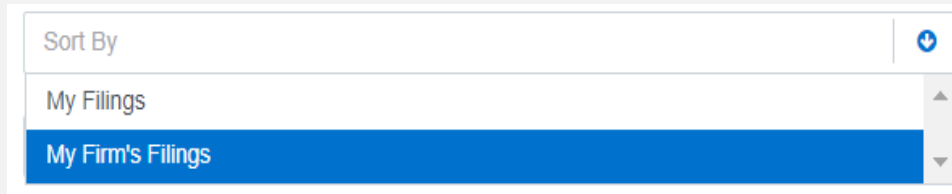
# COMPLETED FILINGS *(continued)*

There are 4 searches that can be performed on the Completed Filings Tab:

A dropdown menu with a search bar at the top containing the text "Search" and a blue circular icon with a downward arrow. Below the search bar, there is a list of four options: "Daily Docket", "Case History", "Docket Search", and "Transaction Status". The "Daily Docket" option is highlighted with a blue background. To the right of the list, there are upward and downward arrow icons indicating scrollability.

- Search
- Daily Docket
- Case History
- Docket Search
- Transaction Status

**Note:** For all searches, Firm Users can choose to access their own filings, or firm filings. To select the filings you wish to see, use the “Filing Of” dropdown on the filter list.

A dropdown menu with a "Sort By" label and a blue circular icon with a downward arrow. Below the label, there is a list of two options: "My Filings" and "My Firm's Filings". The "My Firm's Filings" option is highlighted with a blue background. To the right of the list, there are upward and downward arrow icons indicating scrollability.

- Sort By
- My Filings
- My Firm's Filings

A screenshot of a web application's search interface. At the top is a search bar with the placeholder text "Search" and a blue circular icon with a white arrow pointing down. Below the search bar is a dropdown menu with four options: "Daily Docket" (highlighted in blue), "Case History", "Docket Search", and "Transaction Status".

**"Clear All" will clear the search fields.**

1. The Daily Docket Search allows users to search for filings that they submitted in a specific date range. Use the dropdowns and type fields to enter your search criteria and click "Go" to run the search.
2. The Case History Search allows users to search for filings that they submitted in a specific case. Use the dropdowns and type fields to enter your search criteria and click "Go" to run the search.
3. The Docket Search allows users to search for filings that they submitted and sort them by document type (e.g. Answers, responses to Discovery, etc.). Use the dropdowns and type fields to enter your search criteria and click "Go" to run the search.
4. The Transaction Status Search allows users to search for filings and view what Clerk Review status they are in. Use the dropdowns and type fields to enter your search criteria and click "Go" to run the search.



# COMPLETED FILINGS REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS


If you receive a “**Return for Correction**” or a “**Rejected**” notification from eFile Illinois, please follow these steps to upload and submit your corrected documents:



1. Log onto File & Serve *Illinois* and select the “**Completed Filings**” page from the “**Filing**” drop-down menu.
2. Find the transaction with the “back arrow” in **red**.
3. Click on the back arrow to open up the transaction.

The back arrow allows you to open up the transaction & easily re-submit the corrected documents.

Search Results

Need [process service](#), [skip trace](#) or [courtesy copies](#) ?

Show   filings per page

Envelope ID ⇅	Case Name ⇅	Case Number ⇅	Jurisdiction ⇅	Date Filed ▼	Submitted By ⇅	Action
6191			McLean County	05/03/2017	Training Admin	 

# INCOMPLETE FILINGS

1. This Tab is used to search for and view any filings that you or your firm has not completed and that have been saved in the system. To search for a specific incomplete filing, enter your search criteria and click “Go”.
2. Click on “**Complete Filing**” under the Action column to complete and submit your filing.

**Filing** Firm Admin

Submit a New Filing  
Completed Filings  
Incomplete Filings

Complete Filings + New Filing

Sort By: My Filings Jurisdiction: Select

From Date (mm/dd/yyyy) To Date (mm/dd/yyyy)

Go

Search Results

Show 25 filings per page Search:

Jurisdiction	Case Name	Case Number	Created on	Created By	Action
Clark County			05/31/2018	Training Admin	<a href="#">Complete Filing</a>   <a href="#">Delete Filing</a>
Clark County			05/31/2018	Training Admin	<a href="#">Complete Filing</a>   <a href="#">Delete Filing</a>

# SERVICE CONTACTS

This Tab is used to search for and view service contacts that have been saved by your firm or to add new service contacts. To search for a specific service contact, enter your search criteria and click “Search”. This will populate the screen with only the contact(s) that match your search criteria. Use the “Paper and Pencil” icon to edit the contact and use the “Trashcan Icon” to delete the contact.

Service Contact

First Name











Last Name

Attorney

Email Address

Search

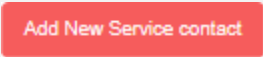
Add New Service contact

First Name	Last Name	Email Address	Action
best	attorney	bestattorney@lawfirm.com	 
best	attorney	fake@fakelaw.com	 
better	attorney	betteratty@firm.com	 
out	attorney	outofstate@lawfirm.com	 
poor	attorney	pooratty@lawfirm.com	 

# SERVICE CONTACTS *(continued)*

To **Add** a service contact, follow these steps:

- 1. Click on the **Add New Service Contact** button:
- 2. This will open a new screen:



Create New Contact

First Name

Middle Name

Last Name

FST Trainng

Attorney

Email Address



Attorney@fake.com

Administrative Copy

Save

Cancel

- 3. Enter the service contact's information.
- 4. If anyone in your firm needs to be copied on the service contact's service, enter one or more email addresses separated by commas (no space) in the **Administrative Copy** field.
- 5. Click **Save** to add the contact to your list.

First Name	Last Name	Email Address	Action
FST Trainng	Attorney	Attorney@fake.com	 

This Tab is used to update your user information in the system. To update your information, make the changes in the type fields and click “Submit” to save your changes

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Filing Firm Admin

File And Serve

Login to FSX  
My Information  
Change Password  
Log Out

My Information

First Name Middle Name Last Name

File And

Serve

Email

texfilefilings@fileandservexpress.com

Firm Name

File and ServeXpress

Submit

# CHANGE PASSWORD

This Tab is used to change your password and/or security question in the system. To change your password and/or security question, enter the requested information in the type fields and click “Submit” to save your changes.

File & Serve *Illinois*™

Filing Firm Admin

File And Serve

- Login to FSX
- My Information
- Change Password
- Log Out

### Change Password

Old Password	New Password	Re-enter New Password
<input type="password"/>	<input type="password"/>	<input type="password"/>

Security Question

Where are we located

Enter Security Answer

Submit