

Welcome to File & ServeXpress

Sussex County Register of Wills



AGENDA

Overview of File & ServeXpress

File & ServeXpress Home Page

Initiating a Case in DE Sussex County Register of Wills

Opening a New case

Document Types

Filing into an Existing Case in DE Sussex County ROW

Add Party or Attorney

Serving Parties – electronic service

Finding your cases – “Searching”

DE Sussex County Register of Wills

***Effective July 1, 2015, all documents filed into the Delaware
Sussex County Register of Wills shall be electronically filed
and served with File & ServeXpress***



FOR
LEGAL
PROFESSIONALS

FOR
STATE &
LOCAL COURTS

FOR
GOVERNMENT
AGENCIES

FOR
SELF-REPRESENTED
FILERS

FOR
MEDIA &
RESEARCHERS

LOGIN 


REGISTER 

**Need Help? Chat
Online**



Chat with an e-Filing Expert
M-F 7:00am-6:00pm CT.

888-247-2051

 CHAT ONLINE

Log In

To login, please select the link below:

- [Login - All States](#) - File & ServeXpress

If you are a Filer in Washington, D.C., please select a login link below:

- [Login - Washington, D.C. Superior Court Filers](#) - CaseFileXpress

Go to the File & ServeXpress Home Page by entering our URL:

<http://www.fileandservexpress.com/login>

Enter your ID and password on the screen that follows.

The File & ServeXpress Home Page

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

[Preferences](#) [Sign Out](#)
Attorney, Adam | Mock Firm A-Bellevue
File & ServeXpress Notices

[HOME](#) | [FILING & SERVICE](#) | [ALERTS](#) | [SEARCH](#)

► MailBox

- Inbox
- Sent Items
- Rejected Items
- Saved Transactions

► Quick Start

State

Court

[File/Serve](#) [Case Search](#) [Set Track Case](#)

► Track & Manage

Transaction ID

[GO](#)

Alerts

- Tracked Items
- Edit Tracked Items
- Calendar

Message Boards

- My Attorneys
- Document Upload
- Case & Party Management
- Billing Information
- View Submitted SOP Orders
- Custom Document Lists

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

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Client Support

- [1-888-529-7587](#)
- support@fileandservexpress.com
- [Chat Online](#)

The File & ServeXpress Resource Center

Rules & Procedures

Guide to rules, requirements, instructions and pricing for each e-filing and e-service jurisdiction.

Select a state and court:

Select a state

Select a court

Education & Training

File & ServeXpress offers live web classes for law firm users. If you are a Court user and need training, please call Court Customer Support at (866) 293-3957.

Online & onsite training classes:

Select a state

Recorded Training Webinars:

Select a class

Important Notices

- > Please note, effective July 14, 2013 batch print/download users must uninstall version 3.0 and install version 4.0. [Click here to view, print or download the how to guide.](#)
- > If you would like Client Services to file your documents, please download the Filing Request Form:

To download our Filing Request Form in PDF Fillable Format, [click here](#) or in MS Word format, [click here](#)

- > [View all notices](#)

What's New

[New Offerings](#)

- > [Follow updates from File & Serve on Twitter](#)

System Requirements

[Supported Browsers and Operating Systems](#)

- > [Browsers and Operating Systems Grid](#)

[Supported Applications](#)

- > [Supported Applications](#)

[Other System Information](#)

- > [Batch Print/Download Utility](#)

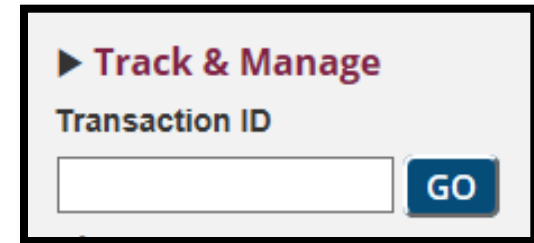
Special Offers

Quick Guides

Access and download guides for using the features of File & ServeXpress.

Finding information for a single transaction or finding all transactions for a single case

To view the case, court, document, filer, etc. information for a specific transaction, enter the transaction ID number in the box shown on the right side of the Home Screen.



▶ Track & Manage
Transaction ID



▶ Quick Start
State
Court
CaseNumber

To view a list of all transactions for a case your firm is involved in, enter the state, court and case information in the Quick Start box on the Home Page, then click “Case Search”.

FILE A NEW CASE: OPENING AN ESTATE

- CASE NAME: IMO Doe, Jane (DOD 1/12/2009)
- CASE INFORMATION SHEET
- CERTIFIED DEATH CERTIFICATE** *filed under Seal*
- LETTER
- PETITION
- WILL / CODICIL / MEMO
- Deliver original Will and certified death certificate original to the Register's office

File a New Case

- **Case Name:** Style the case name, following this example:
IMO Jones, John (DOD 1/6/12)
- New Case Document Types are noted in the dropdown box with an ** and will include:
Death Certificate – Filed Under Seal
- Remember to upload the “**Case Information Statement (Worksheet)**” aka CIS form! This will be the basis for determination of filing fees
- Deliver to ROW– Will & Death Certificate

Register of Wills and E-filing

Certified Death Certificate

- Filed Under Seal
- Deliver in Paper Format
- (Cases can be opened with only Obituary)

Register of Wills and E-filing

CASE INFORMATION SHEET

- Worksheet
- Standard Court Requirement
- Avoid Rejection
- The Key to Fees
- Accepted with Edits

Register of Wills and E-filing

LETTER

- Communicate
- Checklist of Documents being efiled
- Is there a Will? Self Proving?
- Shorts
- Appointment Needed
- Special Issues

Register of Wills and E-filing

Will, Codicil and Memorandum

- Title – Pages, Date, Self Proving
- Document Conversion
- The option of “Submitted Conventionally”
- e-File Will, Codicil & Memo Separately
- Deliver in Paper Format
- Probes

Register of Wills and E-filing

WHAT DO YOU E-FILE?

- Decedent died with no will.
- Decedent home in Lewes. Spouse predeceased Decedent.

CDC + WORKSHEET + LETTER + PETITION (PAPER FILE THE CDC)

- Two children of age—one will renounce and the one who will serve as PR lives out of state.
- Rule 190

RENUNCIATION + POWER OF ATTY + RULE 190

Register of Wills and E-filing

WHAT DO YOU E-FILE?

- Decedent died with a Will, naming surviving wife as personal representative.
- Decedent owned everything as a tenant of the entirety with his spouse, including a family home.

CDC + WILL + LETTER

- ✓ **JOINTLY HELD PROPERTY AND NO DELEWARE ESTATE
TAX RETURN REQUIRED (NDETRR) AFFIDAVITS**
- ✓ **NO WORKSHEET – ONLY FORMAL PROBATE**
- ✓ **(PAPER FILE THE CDC + WILL)**

Closing an Estate

- Letter
- Accounting
- Receipts
- Efile, email, OR hard copy deliver
- SC2s in batch
- SC1s one page per filing
- SC1 envelopes: “Conventionally file”

Register of Wills and E-filing

ACCOUNTING

- Estate Close Document
- Get the math right
- Letter

Register of Wills and E-filing

RECEIPTS

- E-file
- Paper format

Register of Wills and E-filing

NCs

- SC5 – SC2—SC3—SC1 Filed separately
- You can batch SC2s
- You cannot batch SC1s

Register of Wills and E-filing

INVENTORY

LETTER-ADDITIONAL FEES

ORDER OF APPEARANCE

Existing Cases Parties in Case – Add Party

- Existing cases will be available on our system. We added the Estate as the only party with ***No Answer on File*** as counsel.
- Use the Add Party/Attorney Button on Sending Parties tab to add yourself or client.
- It is possible that there will not be a need for e-service of documents and there may not be opposing parties

Important Information

- All cases are loaded onto the system, we will review adding your party or attorney to a case;
- Legal sized documents can be uploaded; File & Serve converts document to fit to scale;
- Excel spreadsheets cannot be uploaded, they must be scanned and uploaded as .pdfs;
- Obtain documents from Register of Wills site, then scan and e-file;
- After document is e-filed, it may be “Accepted with Edits”
- Appropriate fees will be added

PART II: Best Practices

- Use a Cover Letter
- Search **BEFORE** Opening a New Estate
- Submit Accounting Documents within 10 Business Days of Filing the Accounting

COVER LETTER

- Mutual Communication
- ROW-Approved
- Atty: Problems, Shorts, How to Pay

COVER LETTER

USE A PRE-FORMATTED COVER LETTER

TO THE REGISTER:

PLEASE FIND THE ENCLOSED

Certified Death Certificate (Sealed)

Will of ___ pages. It is ___ self proving or ___ not.

Opening Petition

Trust Inquiry Form

Rule 190

5 Shorts requested and will be picked up.

We prefer to deliver a check rather than be charged via
File & ServeXpress

AVOIDING REJECTIONS

- SEARCH ***BEFORE*** Opening a New Estate
- Submit Accounting Documents within 10 Business Days of Filing the Accounting

OTHER ITEMS

OPENINGS

IMO Todd, Eleanor R. (DOD 1/6/12)

- Not good:

IMO Eleanor R. Todd, aka Eleanor Ruth Todd (DOD 12/6/2012)

- Good:

IMO Todd, Eleanor R., aka Todd, Eleanor Ruth (DOD 12/6/12)

OTHER ITEMS

PARTIES

When opening a new estate, the party of record should be the PERSONAL REPRESENTATIVE, not the Decedent.

CASE NUMBER AND INITIALS

149987 KR

UPON CLOSING THE ESTATE

CLOSED IMO Todd, Eleanor R. (DOD 1/6/12)

File & ServeXpress Contact Information

File & ServeXpress Client Support is available 24 hours a day

Law Firm & Attorneys Customer Support - **1-888-529-7587**

Court Client Support – **1-866-293-3957**

File & ServeXpress Team:

Sheila Karns-Gierek

Firm Coordinator

Office: 1-888-379-5535 x 5060

sgierek@fileandservexpress.com

Milt Stafford

Product Specialist

888-247-2051 X5006

mstafford@fileandservexpress.com