



# CaseFile*Xpress*®

## **USER GUIDE**

eFiling into Existing Probate Division Cases  
Washington, D.C. Superior Court

# CaseFile*Xpress*

## Tips & Guidelines

## TIPS & GUIDELINES (Slide 1 of 3)

- Login page located at <https://dc.casefilexpress.com/Login.aspx>
- Know your User-ID and Password – case sensitive
- The application is best viewed on IE 6+. Performance of the application cannot be guaranteed with other browsers and operating systems, such as Macintosh Safari.
- To access filing information prior to June 2nd, 2012, contact CFX customer support
- Monitor your courtesy email notifications, as well as your dashboard daily for filing alerts or eservice received
- If needed, filing delegates can be added/removed by your firm admin., the Manage Delegates link on Dashboard, or CFX Customer Support

## TIPS & GUIDELINES (Slide 2 of 3)

- The document type list and associated fees are provided/controlled by the clerk's office
- Select the correct document type from drop-down menu **for the lead document only**
- Do not select document types **for any supporting documents**
- Save and title your documents reflecting the content of the document (i.e. Motion, Petition, Response, Reply, Answer to Complaint)
- Know your case number – must be entered in an exact format. Check your case number on the court's website:

<https://www.dccourts.gov/cco/>

(*example:* 2012 CA 001234 A)

## TIPS & GUIDELINES (Slide 3 of 3)

- Payment is not processed for rejected filings, **but they are not docketed**
- If the clerk rejects your filing, please correct based on the clerk's comments and resubmit immediately
- Review and confirm your service list is complete to include the Judge on the case
- The service list is created by our users - always confirm it is correct before submitting your filing

# CaseFile*Xpress*

- Documents excluded from e filing
- Probate court assignments
- Filing rejections
- Acceptable signature
- Redaction of personal information

# DOCUMENTS EXCLUDED FROM EFILING

## PEF Rule 4. Documents Excluded from eFiling

- Wills and codicils
- Initial pleadings that open a Probate Division case. The Probate Division case types are:
  - ADM (Large Decedents' Estates)
  - DIS (Disclaimers)
  - FEP (Foreign Decedents' Estates)
  - FOI (Foreign Intervention Proceedings)
  - GDN (Guardianship of Minors' Estates)
  - INT (Intervention Proceedings)
  - IDD (Interventions – Developmental Disability)
  - LIT (Major Litigation)
  - NRT (Notice of Revocable Trusts)
  - PBM (Probate Miscellaneous)
  - SEB (Small Decedents' Estates)
  - TRP (Trusts)
  - WIL (Wills)

## DOCUMENTS EXCLUDED FROM EFILING

- Petitions to Reopen the Administration of an Estate and Requests for Extension of Personal Representative's Appointment in a closed case
- Bonds
- Verifications and Certificates of Notice when additional court costs are due
- Sealed documents and documents requested be placed under seal, but not the motion to seal; \*  
\*Refer to PEF 8 on how to file The Administrative Order Certifications (AOC) and Financial Account Information forms (FAI)
- Personal Identification Information forms, generally filed with the initial pleading that opens a Probate Division case (filer is responsible for redacting PII - personal identifiable information)
- Filings that require payment of court costs that vary in amount or, deposits into the Estate Deposit Account



## DOCUMENTS EXCLUDED FROM EFILING

- Inventories and accounts, and supporting documents containing financial information
- Exhibits or other documents that are real objects (i.e. x-ray films or blueprints); documents that otherwise may not be viewed comprehensively in an electronic format.
- Fee Petitions must be efiled but do not have the requirement of an active case list  
*(Refer to PEF Procedure 8: Petitions for Compensation (a) Petition for Compensation or Fees eFiled by Attorney or Lay Persons)*
- Matters reviewed by the Office of the Register of Wills and forwarded to the Judge in Chambers, such as:
  - Petitions for a General Proceeding seeking appointment of an emergency guardian or health care guardian;
  - subpoenas for medical records;
  - and applications requesting that the filer be granted permission to proceed In Forma Pauperis in a particular case.

# DOCUMENTS EXCLUDED FROM EFILING

## PEF Rule 6 (a) Service of Documents Excluded from eFiling

Service of initial pleadings to open a Probate Division case, including the original complaint in a LIT proceeding, and service of any other document excluded from eFiling is the responsibility of the filer and must be accomplished in accordance with applicable Superior Court rules. However, proof of such service shall be filed electronically by all filers.

# PROBATE COURT ASSIGNMENTS

**Probate Division has four (4) separate court assignments for eFiling**

- 1) Decedent's Estates
  - ADM/SEB/FEP/WIL
- 2) Incapacitated Individuals
  - INT/IDD/CON/FOI/GDN
- 3) Litigation Cases
  - LIT
- 4) Other
  - TRP/NRT/DIS/PBM

# FILING REJECTIONS

## Common Clerk-Related Rejections

- Motion missing the Proposed Order w/ filing
- Multiple attachments not merged into one document
- Certificate of service missing/not dated/outdated/not signed
- Case number not found
- Incorrect document type selected

Use the following link to view a list of reasons for filing rejections:

<http://fileandservexpress.com/dc>

Click the link for “Avoid Rejected Filings”

## ACCEPTABLE SIGNATURE

“/s/” and printed name or scanned image above the signature line acceptable:

**Example:**

/s/ Brad Smith  
Brad Smith, DC Bar Number: 999999  
Smith & Jones, LLC  
1200 Pennsylvania Ave  
Washington, DC 20006  
(202) 879-0000  
[brad.smith@aol.com](mailto:brad.smith@aol.com)

\* Typed name, address, telephone number, email address and, if applicable, bar number must appear under the signature line. An “/s/” or typographical signature shall be treated as a personal signature for all purposes under the Superior Court rules, including SCR Civil Rule 11.

## REDACTION OF PERSONAL INFORMATION


The Probate Division adopted a privacy rule, SCR-PD 5.1, which requires the filer to redact or remove from the public record the following information: Social Security numbers, dates of birth, and financial account numbers. If you must include such information in a particular filing, a motion should be eFiled (if you are a mandatory eFiler or have registered for eFiling) seeking permission to file the unredacted filing under seal and, upon approval by the court, the unredacted copy can be filed under seal in paper form at the Probate Clerk's Office of the office of the Register of Wills located at Court Building A, 515 5th Street, NW, 3rd Floor, Washington, D.C. 20001.

# Login Screen

## Submit a filing

## LOGIN SCREEN

Login page located at <https://dc.casefilexpress.com/Login.aspx>



**CaseFileXpress Login** ?

User ID:

Password:

☐ Remember Me ?

[Forgot User ID](#) | [Forgot Password](#)

[Login](#)

**Not registered with CaseFileXpress?**

You must register with CaseFileXpress before eFiling with the District of Columbia Superior Court and the Texas State Courts. Our website is best viewed with Internet Explorer 8+ and requires the use of cookies. If you attempt to login and are returned to the login page without seeing an error message, you need to enable cookies. For more information on enabling cookies, click here: [\(Link to enabling cookies.\)](#)

[Register Now](#)

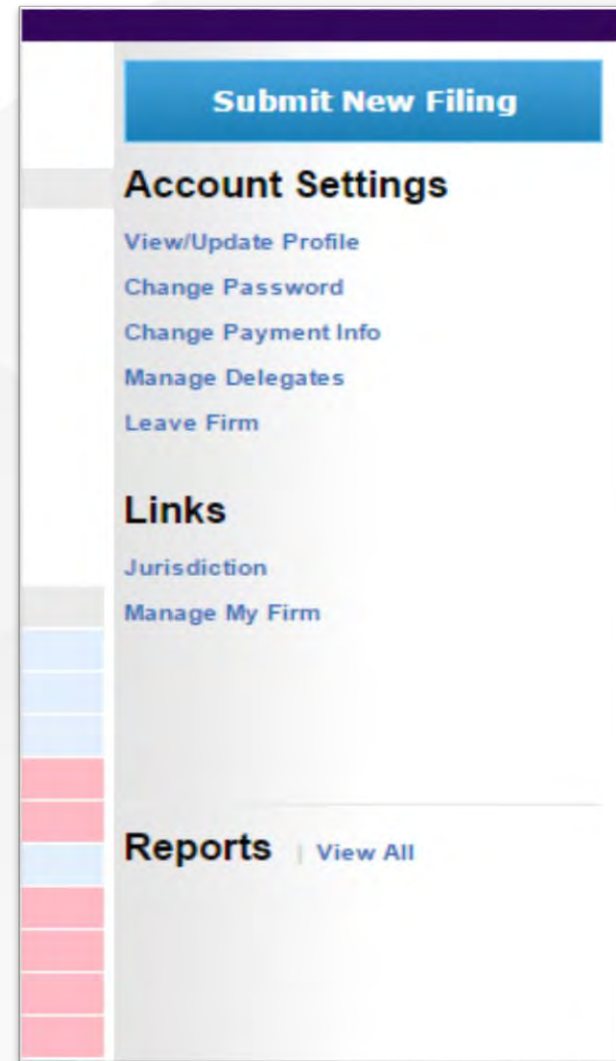
**Looking for more information about CaseFileXpress?**

**Check out the CaseFileXpress latest** [Tips and Guidelines.](#)



## FILER DASHBOARD

Click the Submit New Filing link to begin



# SUBMIT A FILING

## Create Service List with New Case No.

CaseFileXpress®

Submit New Filing | 1. Filing Information | 2. Upload Documents | 3. Services & Fees | Confirm & Submit

1. Enter Filing Information

Please select the Filing Type and enter the required Filing Details. Create your service list, if needed. You may also modify the service list for existing cases. Click Next to continue.

Filing Type: ☒ eFile and eServe ☐ Discovery Service

Filing Details:

- Filing Attorney:
- Jurisdiction:
- Complaint: ☐ Yes ☒ No
- Court Assignment:
- Case Number:
- Case Title/Style:
- Client Matter:
- Use Promocode: ☐ Yes ☒ No

Cancel

Create Service List

Add Attorneys & Judges

Last Name	First Name	Organization	Bar Number	Email	Role	Service
Glover	Danny	CaseFileXpress Training	999999	danny@cfexpress.com	Select -	None

Add Attorneys & Judges

Name Search

To locate a name, you can search by Last Name, First Name, Organization or Bar Number.

Last Name	First Name	Organization	Bar Number	Search
<input type="text" value="Probate Division"/>	<input type="text" value="Judge"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>

- Click “Search” to find the generic “Probate Division Judge” to add to the service list
- Search “last name” with “Probate Division”, “first name” with “Judge”
- Add and eServe “Judge Probate Division” (judgeprobateeserve@dcsc.gov)
- Upload “Other Filing Praecipe” (no court fee)
- Save the filing as a “Draft” to create the service list

# SUBMIT A FILING

## Service List Created

Submit New Filing

1. Filing Information

2. Upload Documents

3. Services & Fees

Confirm & Submit

### 1. Enter Filing Information

Please select the Filing Type and enter the required Filing Details. Create your service list, if needed. You may also modify the service list for existing cases. Click Next to continue.

**Filing Type**

☒ eFile and eServe ☐ Discovery Service

**Filing Details**

Filing Attorney: kydavis

Jurisdiction: D.C. Superior Court

Court Assignment: Civil Actions

New Complaint: ☐ Yes ☒ No

Case Number: 2012 CA 000123 B

Case Title/Style: Fox/Kiser, LLP v. Matthew Peterson, et al.

Client Matter: 2012.00123

Use Promocode: ☐ Yes ☒ No

**Create Service List**

Add Attorneys & Judges

Last Name	First Name	Organization	Bar Number	Email	Role	Service
Davis	Kelly	MMC Test	999999	kelly@cfxpress.com	Plaintiff Attorney	None
Sheehan	William	Goodwin Procter LLP	174714	wsheehan@goodwinprocter.com	Plaintiff Attorney	eServe
Pitofsky	David	Goodwin Procter LLP	999999	dpitofsky@goodwinprocter.com	Plaintiff Attorney	eServe
Davant	Charles	Williams & Connolly LLP	484305	cdavant@wc.com	Defendant Attorney	eServe
Manning	Christopher	Williams & Connolly LLP	464069	cmanning@wc.com	Defendant Attorney	eServe
Smallwood	Jesse	Williams & Connolly LLP	495961	jsmallwood@wc.com	Defendant Attorney	eServe
Kravitz	Judge	Washington DC Superior Court	384747	JudgeKravitzEServe@dcsc.gov	Judge	eServe
Aziz	Kristen	CaseFileXpress, LP	9999999	kristen@cfxpress.com	Defendant Attorney	eServe

Cancel

Next >

- Remember to select a “Role” for anyone you add to the Service List

# SUBMIT A FILING

## Upload Documents – Select Document Type

**CaseFileXpress®**

Submit New Filing   1. Filing Information   **2. Upload Documents**   3. Services & Fees   Confirm & Submit

### 2. Upload Documents

Please select your document type from the drop-down list. This will determine your court fee. Click the browse button to select your lead document, then click upload, including the extension, e.g. '.pdf'. CFX will convert most native formats to PDF. The maximum size per filing is 30 megabytes.

**\*Note: An additional \$10 fee is required for service upon alternate/multiple addresses per defendant and/or agents.**

Click Next to continue.

Document Type:  
Select a file to upload:

Document

Merge Supporting Documents ?

Cancel

© 2003 - 2016 CaseFileXpress v(1.0.7.67)

- Select a document type -

- 2 Alias Summons Filed \$20.00 \*(\$20.00)
- 3 Alias Summons Filed \$30.00 \*(\$30.00)
- 4 Alias Summons Filed \$40.00 \*(\$40.00)
- 5 Alias Summons Filed \$50.00 \*(\$50.00)
- 6 Alias Summons Filed \$60.00 \*(\$60.00)
- 7 Alias Summons Filed \$70.00 \*(\$70.00)
- 8 Alias Summons Filed \$80.00 \*(\$80.00)
- Acceptance of Offer of Judgment (R. 68) Filed(\$0.00)
- Affidavit of Libel of Information by Mail(\$0.00)
- Affidavit of Libel of Information by Special Process Server(\$0.00)
- Affidavit of Service of Summons & Complaint Filed(\$0.00)
- Affidavit of Service of Writ of Attachment(\$0.00)
- Affidavit of Subpoena by Mail(\$0.00)
- Affidavit of Subpoena by Special Process Server(\$0.00)
- Affidavit of Writ of Attachment by Mail(\$0.00)
- Affidavit of Writ of Attachment by Special Process Server(\$0.00)
- Affidavit(\$0.00)
- Alias Summons Filed(\$10.00)
- Amended Certificate of Service(\$0.00)

Upload

Category

# SUBMIT A FILING

## Upload Documents – Browse/Select File to Upload

**CaseFileXpress®**

Submit New Filing   1. Filing Information   **2. Upload Documents**   3. Services & Fees   Confirm & Submit

### 2. Upload Documents

Please select your document type from the drop-down list. This will determine your court fee. Click the browse button to select your lead document, then click upload. including the extension, e.g. ".pdf". CFX will convert most native formats to PDF. The maximum size per filing is 30 megabytes.

**\*Note: An additional \$10 fee is required for service upon alternate/multiple addresses per defendant and/or agents.**

Click Next to continue.

Document Type: Motion for Judgment(\$20.00)

Select a file to upload: Choose File Motion for Judgment.docx Upload

Document   Action   Category

Merge Supporting Documents ?

**Callouts:**

- 1:** Points to the "Upload" button.
- 2:** Points to the "Choose File" button.
- 3:** Points to the "Category" label.



# SUBMIT A FILING

## Upload Documents – Merge Supporting Docs

- Merge supporting documents/exhibits into one document before uploading or,
- Upload all supporting documents, designating them as such in the “Category” column, then click “Merge Supporting Documents.” This will merge all supporting documents into one document as requested by the Civil Division.

**2. Upload Documents** \* Required

Please select your document type from the drop-down list. This will determine your court fee. Click the browse button to select your lead document, then click upload. Follow the same process to upload supporting documents. Filenames are limited to 33 characters, not including the extension, e.g. 'pdf'. CFX will convert most native formats to PDF. The maximum size per filing is 30 megabytes.

Click Next to continue.

Document Type: Other filing (no court cost) (\$0.00)

Select a file to upload:

Document	Action	Category	Page Count	Size (MB)
LeadDocument.pdf	<a href="#">Rename</a>	<span>Leading Document</span>	1	0.01
SupportingDocument.pdf	<a href="#">Rename</a>	<span>Supporting Document</span>	1	0.01
SupportingDocumentTwo.pdf	<a href="#">Rename</a>	<span>Supporting Document</span>	1	0.01

☒ I have verified that the documents have converted correctly

# SUBMIT A FILING

## Upload Documents – Supporting Docs Merged

- Supporting documents have been merged into one document as shown below
- Filer can rename the document if they prefer





**2. Upload Documents** \* Required


Please select your document type from the drop-down list. This will determine your court fee. Click the browse button to select your lead document, then click upload. Follow the same process to upload supporting documents. Filenames are limited to 33 characters, not including the extension, e.g. '.pdf'. CFX will convert most native formats to PDF. The maximum size per filing is 30 megabytes.

Click Next to continue.

Document Type: Other filing (no court cost) (\$0.00)

Select a file to upload: Browse... Upload

Document	Action	Category	Page Count	Size (MB)
 Leaddocument.pdf	<a href="#">Rename</a>	<span>Leading Document</span>	1	0.01 
 SupportingDocument.pdf	<a href="#">Rename</a>	<span>Supporting Document</span>	2	0.03 

Merge Supporting Documents 

☒ I have verified that the documents have converted correctly

Cancel < Previous Next >

# SUBMIT A FILING

## Service & Fees Review

[Submit New Filing](#) | [1. Filing Information](#) | [2. Upload Documents](#) | **3. Services & Fees** | [Confirm & Submit](#)

**3. Services & Fees** \* Required

Please confirm your court fee. You may change the court fee by modifying the document type in Step 2. Click Confirm to review your information before submitting your filing to the clerk.

**Filing Fees**

Jurisdiction: D.C. Superior Court

Court Assignment: Civil Actions

Document Type: Motion to Extend Filed: \$20.00

**CaseFileXpress Fees:**

eFiling Fees	\$15.00
<b>Subtotal</b>	<b>\$35.00</b>
<b>Total:</b> <b>\$37.05</b>	

( Includes NIC Processing )

[< Previous](#) | [Confirm >](#)



# SUBMIT A FILING

## Submit or Save as a Draft

Submit New Filing

1.Filing Information

2.Upload Documents

3.Services & Fees

Confirm & Submit

Confirm & Submit

Please review all of the information below. You may edit information as needed or navigate to a previous step by clicking the numbered tab. You may save this filing as a draft by clicking the Save as Draft button. Drafts are available for filing from your Dashboard. If needed, enter instructions for the court clerk in the Special Instructions window. Click Submit Filing to complete the transaction. \*Required

Filing Information

Case Title:**Smith v Jones**

Jurisdiction:**D.C. Superior Court**

Court Assignment:**Probate Division**

Case Number:**2011 ADM 000012**

Document Type:**Other filing(no court cost)**

Petitioner(s) Plaintiff(s):

Plaintiff Attorney(s):

Defendant Attorney(s):**Kristen Aziz**

Judge:**Judge Probate Division**

Court Reporter:

Other(s):**Kelly Davis**

Client Matter Number:**2011.0012**

Please do not enter an apostrophe in your instructions to the Clerk until further notice.

Special Instruction to the Clerk:

Document Information

LeadDocument.pdf

SupportingDocument.pdf

**Lead Document**

**Other filing(no court cost)**

**Supporting Document**

**Other filing(no court cost)**

Payment Information

\* Select Payment Option:

- Select a payment method...

Payment Method:

Credit Card Type:

Credit Card #:

Cardholder Name:

Personal Information

Filer ID

Attorney of Record:

Filer Name:

Law Firm/Organization:

Bar Number:

Filer Position:

Address:

Phone:

Fax:

Email:

**kjdavis**

**Kelly Davis**

**Kelly Davis (kjdavis)**

**MMC Test**

**999999**

**Petitioner Attorney**

**105 Decker, Irving , TX , 75062**

**(972) 888-7777**

**(972) 555-6666**

**kelly@cfxpress.com**

Cancel

Save as Draft

Submit Filing

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# Email notifications

## Court/CFX contact information

# EFILING ACKNOWLEDGMENT

CaseFileXpress® NOTIFICATION

LOGIN

ACKNOWLEDGMENT OF eFILING

This email acknowledges that the filing information has been received and will be transmitted to the court.  
Please do not reply to this email.

Case Number:	2010 ADM 000959
Document Type:	Other filing(no court cost)
Filing Attorney:	DEBORAH BODDIE
Client Matter Number:	Not applicable
Case Title/Style:	In re Louis O'Brien
Judge:	Judge Campbell
Status:	ACKNOWLEDGEMENT (filing information has been received and will be transmitted to the court)
Date of Status:	Monday, April 13, 2015 1:42:29 PM (Eastern (U.S. and Canada))
Court Assignment:	Probate Division
Jurisdiction:	D.C. Superior Court
Filing Trace Number:	ED301J000354485

PAYMENT INFORMATION

Payment Method:	AMEX
Amount:	\$16.45

**Thank you for eFiling with CaseFileXpress!**  
Access documents and details about this filing or eService by clicking the 'login' button above.

# EFILING CONFIRMATION

CaseFileXpress® NOTIFICATION		LOGIN
CONFIRMATION OF eFILING		
This email confirms that your filing with the following information has been confirmed by the clerk's office. Please do not respond to this email.		
Case Number:	2015 INT 000116	
Document Type:	Other filing(no court cost)	
Filing Attorney:	Suzan Wynne	
Client Matter Number:		
Case Title/Style:	Ruth Elizabeth Williams	
Judge:		
Status:	CONFIRMATION (Filing has been accepted by the clerk)	
Date of Status:	2015-04-13 13:37:05	
Court Assignment:	Probate Division	
Jurisdiction:	D.C. Superior Court	
Filing Trace Number:	ED301J000354163	
Clerk Comments:		
PAYMENT INFORMATION		
Payment Method:	Visa	
Amount:	\$16.45	
Payment Status:	PAID	
Thank you for eFiling with CaseFileXpress! Access documents and details about this filing or eService by clicking the 'login' button above.		

# EFILING REJECTION

CaseFileXpress® NOTIFICATION		LOGIN
REJECTION OF eFILING		
NOTICE: Your filing as shown below has been <b>REJECTED</b> by the Court and <b>WILL NOT</b> be docketed. Please see Comments below and resubmit your filing.		
Case Number:	2013 INT 000461	
Document Type:	Motion	
Filing Attorney:	Jilma Lasso	
Client Matter #:	LL14002	
Case Title/Style:	Yadira Ayala-Reyes	
Status:	<b>REJECTED</b> (Your document was rejected by the court clerk or it was auto-rejected because the filing was not conformant with system requirements. Please see Comments section below for more information. If appropriate, please resubmit it).	
Date of Status:	2015-04-13 13:42:30	
Court Assignment:	Probate Division	
Jurisdiction:	D.C. Superior Court	
Filing Trace #:	ED301J000354475	
Comments:	CF Corrupted Electronic Document / Not Readable	
<b>NOTE:</b> You will need to correct any filing errors as noted by the clerk and resubmit your filing. Please contact us with any questions or concerns at 877-433-4533 or <a href="mailto:info@cfxpress.com">info@cfxpress.com</a> .		
Access documents and details about this filing or eService by clicking the 'login' button above."		

## ESERVICE RECEIVED

CaseFileXpress® NOTIFICATION		LOGIN		
eSERVICE OF eFILING				
Please do not reply to this email.				
Karen Stephenson,				
You have received Electronic Service of Copies for the following:				
Cause/Case Number:	2001 GDN 000011			
EFSP Submission Date/Time:	Monday, April 13, 2015 1:24:59 PM (Eastern (U.S. and Canada))			
CaseFileXpress Jurisdiction:	D.C. Superior Court			
Name of Serving Party:	Anita Tolani			
Court Assignment:	Probate Division			
Style / Case Name:	DIAMOND.CALEB			
Filing Trace Number:	ED301J000354471			
Document Type:	Other filing(no court cost)			
Attachment(s):	ED301J000354471FinalReceipt.pdf			
Judge:	Judge Mitchell-Rankin			
<p><b>PLEASE NOTE:</b> Delivery of eService may not be immediate. If you have not received the document(s) in your Cases section within two hours of this notification, please contact CaseFileXpress at (877) 433-4533 or <a href="mailto:info@cfxpress.com">info@cfxpress.com</a>.</p>				
Access documents and details about this filing or eService by clicking the 'login' button above."				



## PROOF OF ESERVICE

CaseFileXpress® NOTIFICATION		LOGIN
PROOF OF ELECTRONIC SERVICE		
Herman Cramer,		
Attached is your Proof of Electronic Service to the following individual(s) in connection with the filing as outlined below:		
<b>Cause/Case Number:</b>	2009 INT 000233	
<b>Filing Attorney:</b>	Herman Cramer	
<b>Client Matter #:</b>	Lawrence Warren	
<b>Case Title/ Style:</b>	Lawrence Warren	
<b>Court Assignment:</b>	Probate Division	
<b>Jursidiction:</b>	D.C. Superior Court	
<b>Filing Trace #:</b>	ED301J000354513	
<b>Parties of Record – Delivery Type:</b>	Karen Stephenson – Electronic Mencher LC – Electronic Verna Smith – Electronic Judge Wertheim – Electronic	
Access documents and details about this filing or eService by clicking the 'login' button above."		

# Court Contact Information

- **DC Superior Court website:**  
<http://www.dccourts.gov>
- **Hours of Operation:**  
Monday-Friday: 8:30am – 5:00pm and  
Saturday: 9:00am -12:00pm (for filings only)
- **Clerk's Office:**  
202-879-1133/1134
- **Information & Records:**  
202-879-1968
- **DC Superior Court website eFiling FAQs:**  
[www.dccourts.gov/efiling](http://www.dccourts.gov/efiling)



# Contact CaseFileXpress

- ✓ Toll Free: 877-433-4533 or 877-I-eFiled  
(24x7 phone support)
- ✓ LiveChat  
(during business hours 8am – 6pm ET)
- ✓ Send us an email:  
[info@fileandservexpress.com](mailto:info@fileandservexpress.com)
- ✓ Our Home Page:  
<http://fileandservexpress.com/dc>
- ✓ Login Here:  
<https://dc.casefilexpress/>