

File & Serve *Xpress*™

Judge Review - User Guide



File & ServeXpress

Judge Review

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File & Serve 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 & Serve 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.

Judge Review Overview

► MailBox

Items for Clerk Review (357)

Batches for Clerk Review (1)

Items for Judge Review (16)

Inbox (515)

Sent Items

Rejected Items (75)

Saved Transactions

► Quick Start

State

Court

Case Number

File/Serve

Case Search

Set Track Case

► Track & Manage

Transaction ID

GO

Alerts

Tracked Items

Edit Tracked Items

Calendar

Message Boards (6)

My Judges

ACH Payments

Case & Party Management

Minute Order

Requests to Add Party/Attorney

Custom Document Lists

Client Support

1-866-293-3957

support@fileandservexpress.com

Chat Online

Home Page Orientation:

✓ Mailbox:

- The Judge Review feature serves as the “Inbox” for processing documents that require judicial action, as well as notifying parties of actions taken. For example, motions can be granted and orders can be issued with a signature stamp. In addition, documents that are submitted in an editable format (e.g. proposed orders) can be revised, finalized, and sent to parties.
- All recent filing and service activity will be displayed in hyperlinks in the *Mailbox* on the **Home** tab (*Items for Clerk Review, batches for Clerk Review, Items for Judge Review, Inbox, Sent Items, Rejected Items, and Saved Transactions*). New activity is indicated by the category description appearing in bold text.

✓ Track & Manage:

- You can create a list of cases to get an “at-a-glance” view of filing and service activity by searching for the cases and adding them to your **Tracked Items**.
- You can set up an **Alert** for notification of and access to newly filed documents based upon specific search criteria.

Items for Judge Review:

The following documents are pending judge review.

[Click here to check for new transactions](#)

Filter List
Sent during All

Court: -- Select --

Date: from to
(mm/dd/yyyy) (mm/dd/yyyy)

Other: -- Select -- begins with

Other: -- Select -- begins with

Filter List

District, Judge

Choose an action: -- Select -- **Go** Show 50 records

1-12 of 12 transactions <<Prev Page 1 of 1 Next>>

Transaction	Date/Time	Court	Case Number Case Name	Authorizer Organization	Document Type	Document Title	Review Status	Size
<input type="checkbox"/> 47537425	11/3/2012 10:01 AM MDT	CO Mock County District Court	2012CV1212 Colorado Bank vs Leslie Howard	Judge District, CO Mock County District Court	<input type="checkbox"/> Filing Other	notice of hearing posted [view]	Pending	0.2MB
<input type="checkbox"/> 46078314	8/23/2012 6:16 PM MDT	CO Mock County District Court	Multi-Case	Lori Adams, Mock Appeals Firm A-Demo	<input type="checkbox"/> Proposed Order	proposed order to test JR Banner [view]	Pending	0.1MB

Items for Judge Review

If you have received notification, click the **Items for Judge Review** link. Your notifications are displayed in a table with the oldest transactions on top. The columns in the table include:

- ✓ **Transaction ID** - A unique identifier assigned to each transaction submitted through File & Serve. The TID is hyperlinked and access to additional information and judge review screens are available via this link.



- ✓ **Items for Judge Review** – Contains all transactions that are pending judicial review.
- ✓ Columns headings are sortable by clicking on the column heading you want to sort by.
- ✓ Within the Items for Judge Review work area, there are different Filters a user can access.

- ✓ **Date/Time (ET):** The date and time the transaction was first submitted to File & Serve. This can also be used as the file-stamp.
- ✓ **Court:** The Court the transaction is being filed into
- ✓ **Case Number:** The Court's numeric or alphanumeric identifier for the case.
- ✓ **Case name:** The abbreviated form of the case name assigned to the case.
- ✓ **Authorizer:** The name of the attorney submitting the transaction.
- ✓ **Authorizer Organization:** The firm associated with the attorney submitting the transaction.
- ✓ **Document Type:** The type of the document that needs to be reviewed.
- ✓ **Document Title:** The title of the document that needs to be reviewed.
- ✓ **Review Status:** This indicates whether the document has been reviewed or is still pending.
- ✓ **Size:** The size, in Megabytes, of the document waiting to be reviewed.

The screenshot shows a 'Filter List' window with the following elements:

- Court:** A dropdown menu currently set to '-- Select --'.
- Date:** Two input fields for 'from' and 'to' dates, with '(mm/dd/yyyy)' format instructions below them.
- Other:** Two dropdown menus, each followed by a 'begins with' dropdown and an input field. The first dropdown is currently open, showing a list of filterable fields: Authorizer, Authorizer's Firm, Case Name, Case Number, Document ID, Document Title, Document Type, Sender, Sender's Firm, and Transaction.
- Buttons:** A blue 'Filter List' button and a 'Go' button.
- Records:** A 'Show 50 records' dropdown menu.

Items for Judge Review:

- ✓ If a transaction is being reviewed by someone else, you can view the documents but cannot take any review action. A lock icon will appear next to the transaction to indicate that it is being reviewed by another judge.
- ✓ Each court can select the length of time a document can remain locked.
- ✓ The different filters will help prioritize work items based on information such as a date range, the authorizing attorney, document types, case name or number, and a particular transaction.

Reviewing Transactions

To move on documents (i.e. grant, deny, moot, grant-in-part, deny-in-part) in your Judge Review Inbox, take the following steps:

1-12 of 12 transactions <<Prev Page 1 of 1 Next>>

<input type="checkbox"/>	Transaction	Date/Time	Court	Case Number Case Name	Authorizer Organization	<input type="checkbox"/>	Document Type	Document Title	Review Status	Size
<input type="checkbox"/>	47537425	11/3/2012 10:01 AM MDT	CO Mock County District Court	2012CV1212 Colorado Bank vs Leslie Howard	Judge District, CO Mock County District Court	<input type="checkbox"/>	Filing Other	notice of hearing posted [view]	Pending	0.2MB
<input type="checkbox"/>	46078314	8/23/2012 6:16 PM MDT	CO Mock County District Court	Multi-Case	Lori Adams, Mock Appeals Firm A-Demo	<input type="checkbox"/>	Proposed Order	proposed order to test JR Banner [view]	Pending	0.1MB

1. Click on the Transaction ID of the Transaction you wish to review. This is located in the far left hand column of the list of documents waiting to be reviewed. This will take you into the Transaction so that you can review it.

Case number: [2012CV1212](#) [\[View Case History\]](#)

Filed and served at 11/3/2012 10:01 AM MDT

Case name: Colorado Bank vs Leslie Howard

No calendar event scheduled

Court: CO Mock County District Court

Division: 1 - Division 1

Judge: District, Judge

Authorizer:

View document(s) for judge review View all document(s) as a list View document(s) inline

Document List (1) Total Statutory Fees: \$0.00

Main Document, 3 pages ID: 61528091
[Document History](#) | [PDF Format](#) | [Original Format](#)

Document type: Filing Other **Judge review status/action:**

Security: Public **or delay this transaction until:** (mm/dd/yyyy)

Statutory fee: \$0.00

Document title: notice of hearing posted

[Continue >>](#)

Last Updated: 2/3/2017

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Reviewing Transactions:

- ✓ You have the option to view only those documents sent to Judge Review or to view all documents in the Transaction by choosing the appropriate Radio Button located just above the Document List.
- ✓ As a Judge user, the system will default to your name as the authorizer.
- ✓ As a Clerk user, the system will default to display the name of the judge to whom the transaction was originally routed.

2. The Document List provides you with all of the details of each document, such as filing fee information, title, document type and hyperlinks to view the original and PDF versions of each document, as well as a link to the document history
3. The Application allows the user to change the authorizing judge on transactions. The dropdown of judge names is located directly above the Document List and will include any judges for whom the user has judge review rights. Change the Authorizer by clicking on the dropdown list and choosing the appropriate Judge.
4. Click on the PDF link to view the document that you wish to move upon.
5. Choose whether you want to Grant, Deny or otherwise move upon the document by choosing the appropriate action from the **Judge review status/action** field.

Authorizer: ▼

View document(s) for judge review
 View all document(s) as a list
 View document(s) inline

Document List (1) Total Statutory Fees: \$0.00

Main Document, 3 pages ID: 61528091
[Document History](#) | [PDF Format](#) | [Original Format](#)

Document type: Filing Other	Judge review status/action:	<div style="border: 1px solid #000; padding: 2px;"> Pending Denied Granted Denied in Part Granted in Part Granted with Amendments Issued </div>
Security: Public	or delay this transaction until:	
Statutory fee: \$0.00		
Document title: notice of hearing posted		

[Continue >>](#)

6. Click Continue.

7. This brings you to your **Judicial Communication** page. You have the option to add comments to this Review, or you can merely update the Judge Review status without comment. Choose the appropriate radio button for your actions in Step 1.

1. File & Serve AND update judge review status
 Update judge review status only

8. In Step 2, choose your document type:

2. Select the options for your document(s):

Transaction ID:	Document type:	Judge review status/action:
47537425	Filing Other	Granted
Document title: notice of hearing posted		

Document type: ▼

Options:

9. Under the Options area of Step 2, you have several choices available to you. Choose the appropriate action from the dropdown:
- Send reviewed document.** This method uses the document provided by the filer, placing the judge review banner on the document.
 - Send my document.** This method uses the Judge’s own document, not sending back the document that was initially routed to judge review. Banners & Comment Pages can be applied to the judge’s OWN document.

Reviewing Transactions:

- ✓ The outgoing document type is programmed to default to ORDER, and there are three choices for sending out your documents:
 - SEND REVIEWED DOCUMENT: This is the “recycling” method, of using the document provided by the filer and placing the judge review banner on the document.
 - SEND MY DOCUMENT: This is for when the judge wishes to send out his or her own document, not sending back the document that was initially routed to judge review.
 - ATTACH MY DOCUMENT TO THE REVIEWED DOCUMENT: This allows the judge to “recycle” the document provided by the filer, and also attach an additional document to the outgoing document.
 - Banners & Comments Pages can be applied to the judge’s OWN document.

- c. **Attach my document to the reviewed document.** This method allows the Judge to attach an additional document to the outgoing document (originally submitted by the filer).

10. Enter any optional comments and select any additional comments from the Additional

Comments (optional)

Maximum length of text is 2000 characters

Include the following with your comments:

<input type="checkbox"/> File & ServeXpress reviewed Transaction ID	<input type="checkbox"/> Case number
<input type="checkbox"/> Court	<input type="checkbox"/> Case name
<input type="checkbox"/> Judge	<input type="checkbox"/> Current date
<input type="checkbox"/> Alternate judge	<input type="checkbox"/> Authorizing Judge signature
<input type="checkbox"/> Court Authorizer	<input type="checkbox"/> /s/ Judge Judge District

Position Comments Page:

First page

Last page

Comments Field by checking the boxes listed below the Comments text box:

11. Choose where you would like the comments page positioned. You can choose to place it on either the first or last page of the outgoing document.
12. Choose the location of the judge’s signature banner. You can choose either the first page of the reviewed document, the last page of the reviewed document or on all pages of the reviewed

Apply Overlay to:

First Page of the reviewed document

Last Page of the reviewed document

All Pages of the reviewed document

Do not apply Overlay to reviewed document

[Preview Revised Document](#)

Reviewing Transactions:

- ✓ The Comments Field is optional.
- ✓ Comments entered into the Comments Section can be up to 2,000 characters in length.
- ✓ Among other choices, you can select “Court Authorizer and “Authorizing Judge Signature” from the Additional Comments Field.
- ✓ You can select as many additional comments from the Additional Comments Field as you wish.

document.

13. In Step 3, you will choose the recipients who you would like the document sent to. Once you have made your selection, click the tab for Continue:

3. Send document to:

- All attorneys in case (will not be sent to pro se parties)
- All attorneys and pro se parties in case
- Service recipients, authorizer and sending party's attorney of reviewed transaction
- Authorizer and the sending party's attorney of reviewed transaction
- Select custom list of recipients
- No one (file only)

14. Click Continue. At this point, your page will refresh and you will see a message asking you to wait while your document is being converted. Once the conversion has completed, your screen will again refresh and you will be brought to the final Review and Submit page.

Reviewing Transactions:

- ✓ You have several choices when selecting recipients that the reviewed document can be sent to:
- All Attorneys in the case;
 - All Attorneys and Pro Se parties in the case;
 - Individuals/Firms that were served with the original document, the authorizer and the sending party's attorney;
 - Authorizer and sending party's attorney;
 - Select a customized list of recipients;
 - No one (this means that the reviewed document will be 'file only' and will be added to the docket of the case but will not be served on anyone.

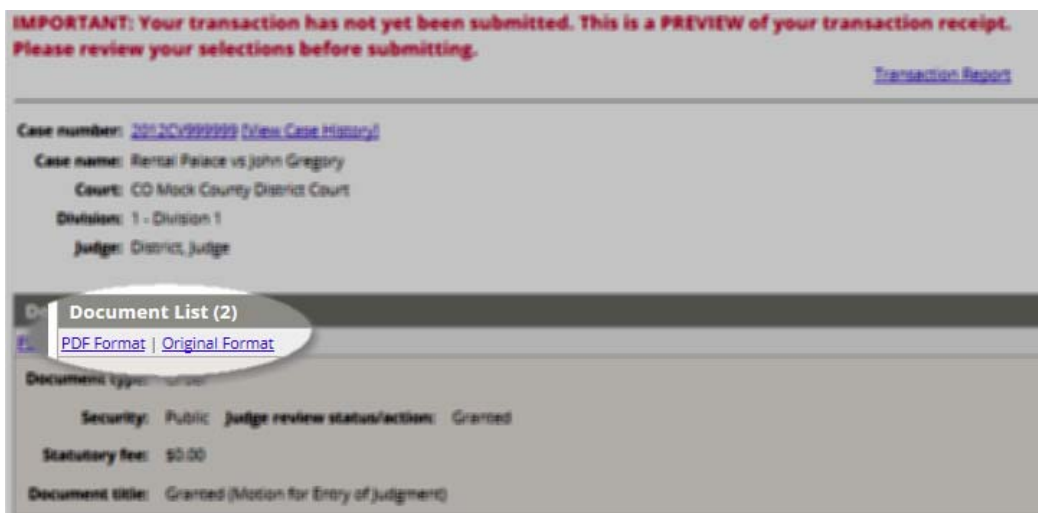
Please wait while your document is converted to pdf format...

This page will automatically refresh until it is done.

When conversion is complete you will have to review and submit your transaction.



15. On this next page, the review page, you have a final opportunity to view both the PDF document and the original and to review the other information in your transaction before you submit it.



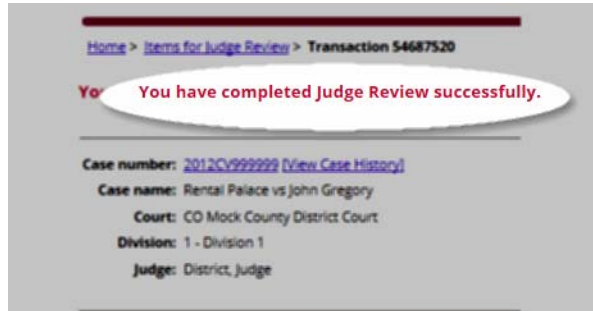
Reviewing Transactions:

- ✓ To print your receipt, click on the Print Receipt link at the top, right hand side of the transaction receipt screen.
- ✓ To go back to your Items for Judge Review inbox, click the Items for Judge Review hyperlink at the top, left hand side of the page.
- ✓ At the top right of the receipt, you have the option to print your receipt, go to the original transaction or onto the previous or next transaction.

16. Once you are satisfied with all of your details, click the **Submit** tab.



17. Once you have clicked Submit, you will see the Judge Review Receipt and the message **You have completed Judge Review successfully.**



Removing Transactions

If there are Transactions in the **Items for Judge Review** Inbox that a Judge no longer has the need to move upon, the Judge may remove them from the Judge Review Queue with a few simple steps:



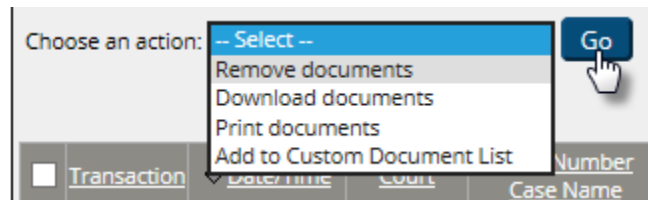
1. Click on the **Items for Judge Review** link in the Mailbox.

2. Place a checkmark in the checkbox next to the transaction(s) that you wish to remove from the queue.

1-9 of 9 transactions <<Prev Page 1 of 1 Next>>

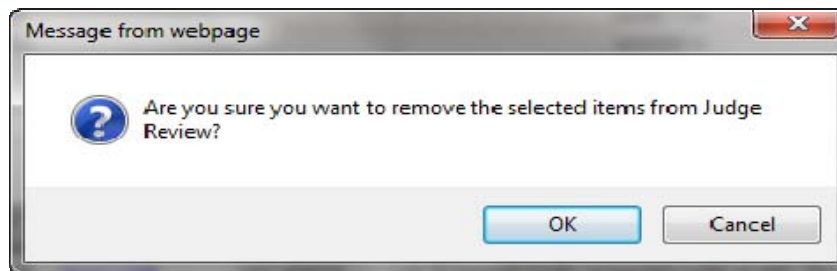
<input type="checkbox"/>	Transaction	Date/Time	Court	Case Number Case Name	Authorizer Organization	<input type="checkbox"/>	Document Type	Document Title	Review Status	Size
<input checked="" type="checkbox"/>	46078314	8/23/2012 6:16 PM MDT	CO Mock County District Court	Multi-Case	Lori Adams, Mock Appeals Firm A-Demo	<input checked="" type="checkbox"/>	Proposed Order	proposed order to test JR Banner [view]	Pending	0.1MB
<input checked="" type="checkbox"/>	41361765	12/13/2011 9:26 AM MST	CO Mock County District Court	2011CV1125 Bank of the West vs Amanda Carlson	Jay Brody, Mock Appeals Firm B-Demo	<input checked="" type="checkbox"/>	Motion	Motion for Extension of Time to Respond to Complaint [view] • Linked to (1)	Pending	0.1MB
						<input checked="" type="checkbox"/>	Proposed Order	Order to Extend Time [view]	Pending	0.1MB
<input type="checkbox"/>	39776347	9/13/2011 8:34 AM MDT	CO Mock County District Court	2010dr100235 Wonderland, Alice vs Wonderland John	Adam Attorney, Mock Firm A-Bellevue	<input type="checkbox"/>	Motion to Modify	Motion to Modify [view]	Pending	0.1MB

3. Select *Remove Documents* from the **Choose an action** dropdown list at the top of the **Items for Judge Review** list.



4. Click the **Go** button.

5. Click **OK** in the Pop-up box asking *Are you sure you want to remove the selected items from Judge Review?*



6. The **Items for Judge Review** screen will refresh and the selected items will no longer be listed in the Judge Review queue.

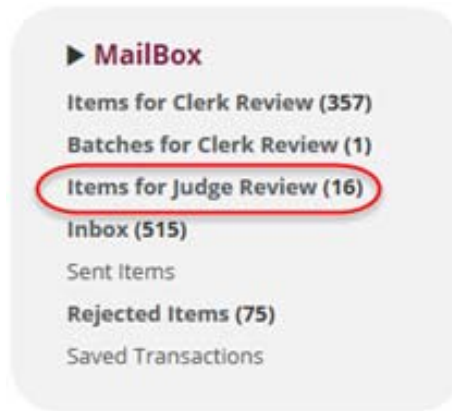
Removing Transactions

- ✓ If you wish to remove documents from the *Items for Judge Review Inbox* without removing the entire transaction, you can:
 - Instead of placing your checkmark in the checkbox next to the Transaction ID, place the checkmark in the checkbox next to the document(s) you wish to remove.

Delay Judge Review

If you wish to delay moving upon the document, you have the option to delay Judge Review until a date of your choosing. Take the following steps to move an item from the **Items for Judge Review** to the **Delay Judge Review** Queue:

1. Click on the **Items for Judge Review** link in the Current Activity section of the **Home** tab.



2. Click on the Transaction ID of the Item you wish to move.

Choose an action: -- Select -- Show 200 records

1-9 of 9 transactions <<Prev Page 1 of 1 Next>>

<input type="checkbox"/>	Transaction	Date/Time	Court	Case Number Case Name	Authorizer Organization	<input type="checkbox"/>	Document Type	Document Title	Review Status	Size
<input type="checkbox"/>	46078314	8/23/2012 6:16 PM MDT	CO Mock County District Court	Multi-Case	Lori Adams, Mock Appeals Firm A-Demo	<input type="checkbox"/>	Proposed Order	proposed order to test JR Banner [view]	Pending	0.1MB
<input type="checkbox"/>	41361765	12/13/2011 9:26 AM MST	CO Mock County District Court	2011CV1125 Bank of the West vs Amanda Carison	Jay Brody, Mock Appeals Firm B-Demo	<input type="checkbox"/>	Motion	Motion for Extension of Time to Respond to Complaint [view] • Linked to (1)	Pending	0.1MB
<input type="checkbox"/>	39776347	9/13/2011 8:34 AM MDT	CO Mock County District Court	2010dr100235 Wonderland, Alice vs Wonderland John	Adam Attorney, Mock Firm A-Bellevue	<input type="checkbox"/>	Proposed Order	Order to Extend Time [view]	Pending	0.1MB
<input type="checkbox"/>	39776347	9/13/2011 8:34 AM MDT	CO Mock County District Court	2010dr100235 Wonderland, Alice vs Wonderland John	Adam Attorney, Mock Firm A-Bellevue	<input type="checkbox"/>	Motion to Modify	Motion to Modify [view]	Pending	0.1MB

Last Updated: 2/3/2017

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Delay Judge Review:

- ✓ The Delay Judge Review Queue contains any documents you wish to delay moving upon but do not want sitting in your Items for Judge Review Inbox.
- ✓ To view your Delay Judge Review Queue, click on the Delayed Judge Review Items link at the top, right side of the Items for Judge Review Inbox.

3. Type the date you wish to delay Judge Review until in the “**Delay this transaction until box**” and click Continue.

Authorizer: ▼

View document(s) for judge review View all document(s) as a list View document(s) inline

Document List (2) Total Statutory Fees: \$0.00

Main Document, 1 page ID: 53224905
[Document History](#) | [Linked Documents](#) | [PDF Format](#) | [Original Format](#)

Document type: Motion **Judge review status/action:** Pending ▼

Security: Public **or delay this transaction until:** x (mm/dd/yyyy)

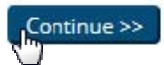
Statutory fee: \$0.00

Document title: Motion for Extension of Time to Respond to Complaint

Main Document, 1 page ID: 53224906
[Document History](#) | [PDF Format](#) | [Original Format](#)

Document type: Proposed Order **Judge review status/action:** Pending ▼

Document title: Order to extend time



4. The Screen will refresh to the next Transaction ID in your **Items for Judge Review Inbox**.
5. To view your Delay Judge Review Queue, click on the Delayed Judge Review Items link at the top, right side of the Items for Judge Review Inbox.

Filter List Sent during ▼

District, Judge

Show: [Delayed Judge Review items](#)