

File & Serve *Xpress*™

**Case & Party
Management-**
User Guide



File & ServeXpress

Case & Party Management

Table of Contents

Contents

File & Serve Resources.....	3
Case & Party Management Overview	4
Add Party:	5
Modify Party:.....	5
Add Attorney:.....	5
Substitute Attorney:.....	5

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.

Case & Party Management Overview

Use **Case & Party Management** to update the status of parties and attorneys in cases. Not all courts permit online Case & Party Management requests, and in some jurisdictions, special rules apply. For more information, check the Rules & Procedures for your particular court (available through the Resource Center) or contact Customer Support.

Locate the Case & Party Management page by clicking on the Case & Party Management link in the Track & Manage area of the File & ServeXpress Home Page.

The screenshot shows the File & ServeXpress Home Page. At the top left is the logo "File & ServeXpress™ The e-Filing & e-Service Experts™". At the top right are links for "Preferences | Sign Out", "Attorney, Adam | Mock Firm A-Bellevue", and "File & ServeXpress Notices". Below the logo is a navigation bar with "HOME", "FILING & SERVICE", "ALERTS", and "SEARCH". The main content area is divided into three sections: "MailBox" (Inbox, Sent Items, Rejected Items (1), Saved Transactions (6)), "Quick Start" (State, Court, Case Number dropdowns, and "File/Serve", "Case Search", "Set Track Case" buttons), and "Track & Manage" (Transaction ID input with "GO" button, Alerts (8), Tracked Items, Edit Tracked Items, Calendar, Message Boards (6), My Attorneys, Document Upload, [Case & Party Management](#), Billing Information, View Submitted SOP Orders, Custom Document Lists). A red arrow points to the "Case & Party Management" link in the "Track & Manage" section.

Case & Party Management Tips:

- ✓ **Note:** Change requests take up to 24 hours. If you have a filing due today and you need an immediate data change, complete your request online then contact Customer Support with the change request ID and request that the change be completed ASAP.

Case & Party Management Features:

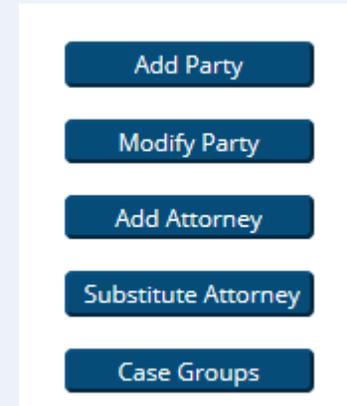
Add Party - Allows you to add party information to a case where a party was not named in the original complaint. Also allows you to enter party information for those who were inadvertently left off the service list.

Modify Party - Allows you to remove your party from a case after being dismissed and also to withdraw your firm from representation of a case party.

Add Attorney - Allows you to add a new attorney to a case.

Substitute Attorney - Allows you to transfer representation of a party to another attorney or to correct the service list if the wrong attorney is listed.

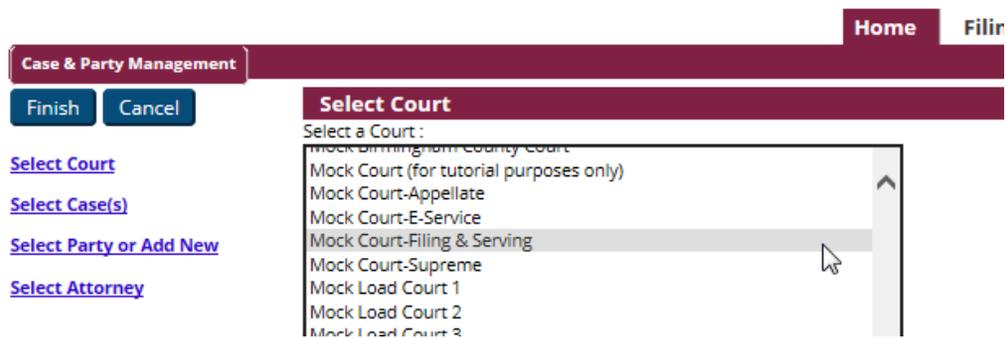
✓ Case & Party Management includes:



Add Party

1. From the main Case & Party Management Page, click the blue button for **Add Party**. The *Select Court* page appears.
2. From the drop down menu, select the court presiding over the case in which you wish to make changes. The *Select a Case* page appears.

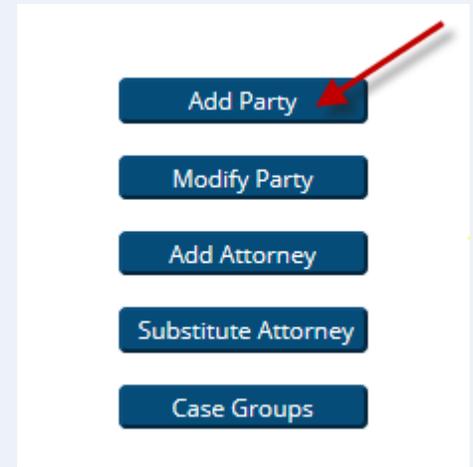
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3. Enter a portion of the name or number of the case(s) in which you wish to make changes and click **Find**.

Add Party Tips:

- ✓ From the main Case & Party Management Page, select the button for Add Party:



Home Filing & Service

Case & Party Management

Finish Cancel

Select a Case

[Select Court](#)
Court : Mock Court-Filing & Serving

[Select Case\(s\)](#)
[Select Party or Add New](#)
[Select Attorney](#)

Court Name : Mock Court-Filing & Serving
Case Name : Johnson
Case Number :

Find Select Cases

- Place a check in the box by the Case Number in the *Court Case List* and click **Select Cases**. The *Select Party* page appears.

Select Party

Select an entity type and input the name of your party. Search. If the p

Entity Type :
* Party Name :

Business
Individual
Organization
Professional Surety
School

Find

- Select an entity type from the drop down menu, enter in party information and click **Find** (required fields are marked with an asterisk).

Select Party

Select an entity type and input the name of your party to do a quick search. If the party is r

Entity Type : Individual

Party First Name : Marie

Party Middle Name :

* Party Last Name : Johnson

Party Suffix :

- ✓ **Party's Name Does Not Appear:** When searching for your party, if your party's name does not appear in the list, click **Re-search** to modify and re-run your search.

6. Choose a party type from the drop down menu in the resulting screen, and then click the name of your party.

Select a Party Type then click the Party Name to select the party.
A selected alias party name will reflect the alias to party name when completed.

Party Type :

Party Name	Is an alias
Johnson, Marie L	No
JOHNSON, MARIELA	No
JOHNSON, MARIELA	No
Johnson, Marie	No
Johnson, Marie A	No

If you cannot find your Party or if you are unsure that any of these match click or

- Click on your party's name or, if your party's name did not appear, click **Add New Party**, complete the resulting fields, and click *Add Party* to create a new party.

- Once the party is selected/created and added, The *Select Attorney* page appears.
- To select counsel from your firm, choose the attorney and attorney type from the drop down menus and click **Select**.

- ✓ **Attorney Unknown:** If the attorney is unknown click **Set Attorney as Unknown**, and then click **Add To Case(s)** in the resulting screen.
- ✓ **Attorney in Another Firm:** If the attorney is in another firm, click **Find Attorney in Another Firm** to search our database. Enter search criteria in at least one of the fields on the upper part of the page, and click **Find**. The *Attorney Name Search Results* list appears. If the attorney name does not appear in the list, click **Re-search** to modify and re-run your search. To select an attorney choose the attorney type from the drop down menu and click on the attorney's name. Next, click **Add To Case(s)** in the resulting screen.
- ✓ **Note:** In order to facilitate the requested changes, File & Serve must verify the change with any special jurisdictional rules, the Court and Court Record.
- ✓ **Supporting Documentation:** Types of supporting documentation may include a copy of the complaint, copy of an appearance filed or a letter from your office authorizing your request.

10. Click **Add To Case(s)** in the resulting screen. The *Signature Documentation* page appears.

Signature Documentation

To verify that the Petition/Motion has been filed and signed by the judge, you must either enter the File & ServeXpress Transaction ID and Document Title of the filed document or attach an electronic copy of the signed filed document below.

Transaction ID
Document Title

Attached Documentation
Document Path

11. Enter the **Document Title** and the **Transaction ID** of the electronically-filed document verifying your change, or attach an electronic copy of the supporting documentation.
12. Click the **Submit** button.

Modify Party

To modify case party information:

1. From the main Case & Party Management Page, click the blue button for **Modify Party**. The *Modify Case Participants* page appears.
2. From the drop down menu select the court presiding over the case in which you would like to make changes.

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Home Filing & Service

Case & Party Management

Modify Case Participants

Select a Court :

Mock Court-Filing & Serving

Court Name : Mock Court-Filing & Serving

Case Name :

Case Number :

Case Class :

Case Type :

Attorney First Name :

Attorney Middle Name :

Attorney Last Name :

Party First Name :

Party Middle Name :

Party Last Name/Organization Name :

Find

3. Enter search criteria in at least one of the fields on the page and click **Find**. The *Case Participants Search Results* screen appears.

Modify Party Tips:

- ✓ From the main Case & Party Management Page, select the button for **Modify Party**:



- Place a check box next to the applicable entry (ies) and select the appropriate radio button next to Party Dismissed or No Longer Represent This Party. Click **Update**.

Case & Party Management

On all selected Case Participants change:

Party Status to Party Dismissed
 No Longer Represent This Party

Case Participants search results Select Participants to modify. 1 through 6

<input type="checkbox"/>	Party Name	Party Type	Participant Status	Attorney Name	Attorney Type
<input type="checkbox"/>	123 Inc	Defendant	Active	No Answer on File	N/A
<input type="checkbox"/>	A B C Corp	Defendant	Active	No Answer on File	N/A
<input type="checkbox"/>	Jackson, Jennifer	Plaintiff	Dismissed	Bob Barrister	Attorney in Charge
<input checked="" type="checkbox"/>	Johnson, John	Plaintiff	Active	Adam Attorney	Attorney in Charge
<input type="checkbox"/>	L M N LP	Defendant	Active	No Answer on File	N/A
<input type="checkbox"/>	XYZ Co	Defendant	Active	No Answer on File	N/A

Case Participants search results Select Participants to modify. 1 through 6

- ✓ **Supporting Documentation:** Types of supporting documentation may include a copy of the dismissal, a copy of an executed Request to Remove Party/Law Firm from Service List form (in San Francisco) or a letter from your office authorizing your request.

- The *Signature Documentation* page appears. Enter the **Document Title** and the **Transaction ID** of the electronically filed document verifying your change request, or attach an electronic copy of the supporting documentation.

To verify that the Petition/Motion has been filed and signed by the judge, you must either enter the File & ServeXpress Transaction ID and Document Title of the filed document or attach an electronic copy of the signed filed document below.

Transaction ID

Document Title

Attached Documentation

Document Path

Add Attorney

To add new attorney information:

1. From the main Case & Party Management Page, click the blue button for **Add Attorney**. The *Add Attorney* page appears.
2. From the drop down menu select the court presiding over the case in which you would like to make changes.

Select Court

Select a Court :

- Mock Court-E-Service
- Mock Court-Filing & Serving
- Mock Court-Supreme

3. Enter a portion of the name or number of the case(s) in which you wish to make changes and click **Find**.
4. Place a check in the box by the Case Number in the *Court Case List* and click **Select Cases**.

Select a Case

Court Name : Mock Court-Filing & Serving

Case Name : ⓘ

Case Number : ⓘ

Court Case List 1 through 2 of 2

<input type="checkbox"/>	Case Number	Case Name
<input type="checkbox"/>	06-C-998 MNG (Test)	CLOSED 5/21/2013 Johnson, Janet vs Rawl Sales Corp
<input checked="" type="checkbox"/>	2012L000123	Johnson, John vs XYZ Corp et al

Court Case List 1 through 2 of 2

Add Attorney Tips:

- ✓ From the main Case & Party Management Page, select the button for Add Attorney:



- The *Select Party* Page appears. Click the party's name. If the party you are looking for does not appear in the list, select the entity type from the drop down menu, enter the party name and click **Find**. The *Select Attorney* page appears.

- To select counsel from your firm, choose the attorney and attorney type from the drop down menus and click **Select**.
- Click **Add To Case(s)** in the resulting screen. The *Signature Documentation* page appears.

Signature Documentation

To verify that the Petition/Motion has been filed and signed by the judge, you must either enter the File & ServeXpress Transaction ID and Document Title of the filed document or attach an electronic copy of the signed filed document below.

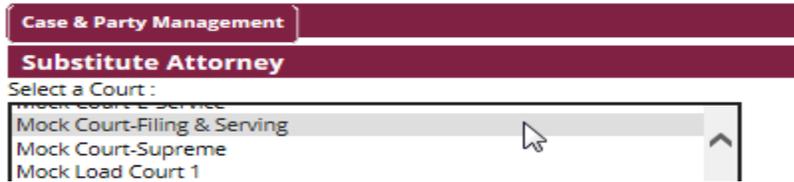
Transaction ID
Document Title
 Attached Documentation
Document Path

- Enter the **Document Title** and the **Transaction ID** of the electronically-filed document verifying your change, or attach an electronic copy of the supporting documentation.
- Click the **Submit** button.

- ✓ **Attorney Unknown:** If the attorney is unknown click **Set Attorney as Unknown**, and then click **Add To Case(s)** in the resulting screen.
- ✓ **Attorney in Another Firm:** If the attorney is in another firm, click **Find Attorney in Another Firm** to search our database. Enter search criteria in at least one of the fields on the upper part of the page, and click **Find**. The *Attorney Name Search Results* list appears. If the attorney name does not appear in the list, click **Re-search** to modify and re-run your search. To select an attorney choose the attorney type from the drop down menu and click on the attorney's name. Next, click **Add To Case(s)** in the resulting screen.
- ✓ **Note:** In order to facilitate the requested changes, File & Serve must verify the change with any special jurisdictional rules, the Court and Court Record.

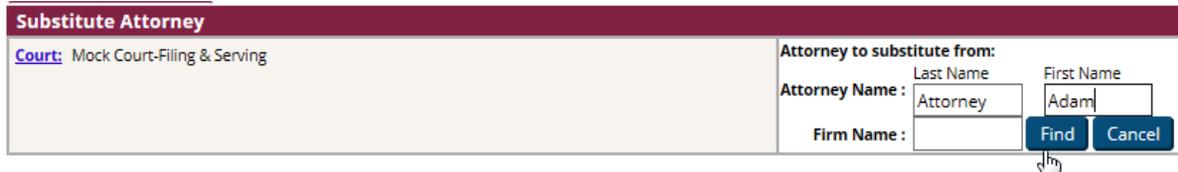
Substitute Attorney

1. From the main Case & Party Management Page, click the blue button for **Add Attorney**. Click **Substitute Attorney**. The *Select Court* page appears.



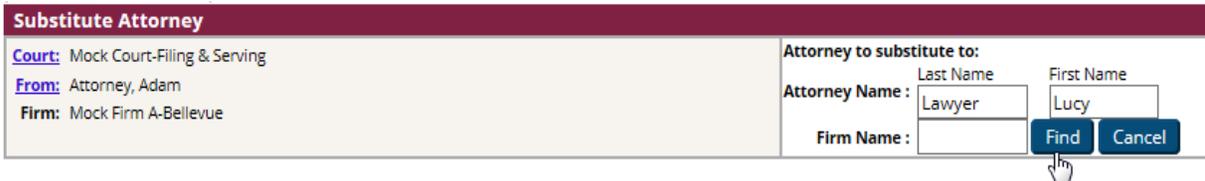
The screenshot shows the 'Case & Party Management' header with a 'Substitute Attorney' button highlighted in a dark red bar. Below the header, a 'Select a Court:' dropdown menu is open, showing options: 'Mock Court-Service', 'Mock Court-Filing & Serving', 'Mock Court-Supreme', and 'Mock Load Court 1'. A mouse cursor is pointing at the 'Mock Court-Filing & Serving' option.

2. Select the court presiding over the case(s) in which you would like to make changes from the drop down menu in the resulting screen. The *Substitute Attorney From* page appears. Enter in a portion of the attorney name and/or firm name for the attorney you wish to substitute from in the fields provided then click **Find**.



The screenshot shows the 'Substitute Attorney' page with the 'Court:' field set to 'Mock Court-Filing & Serving'. The 'Attorney to substitute from:' section has 'Attorney Name' fields for 'Last Name' (containing 'Attorney') and 'First Name' (containing 'Adam'). The 'Firm Name' field is empty. 'Find' and 'Cancel' buttons are visible at the bottom right.

3. A list of matching attorneys will appear. Click the desired attorney's name.
4. The *Substitute Attorney To* page appears. Enter in a portion of the attorney name and/or firm name for the attorney you wish to substitute to in the fields provided then click **Find**.



The screenshot shows the 'Substitute Attorney' page with the 'Court:' field set to 'Mock Court-Filing & Serving'. The 'From:' field is set to 'Attorney, Adam' and the 'Firm:' field is set to 'Mock Firm A-Bellevue'. The 'Attorney to substitute to:' section has 'Attorney Name' fields for 'Last Name' (containing 'Lawyer') and 'First Name' (containing 'Lucy'). The 'Firm Name' field is empty. 'Find' and 'Cancel' buttons are visible at the bottom right.

Substitute Attorney Tips:

- ✓ From the main Case & Party Management Page, select the button for Substitute Attorney:



- A list of matching attorneys will appear. Click the desired attorney's name.
- The *Case Search* page appears. Search for your case by entering a portion of the case name or case party in the fields provided. Click **Find**.

Substitute Attorney

Court: Mock Court-Filing & Serving
From: Attorney, Adam
Firm: Mock Firm A-Bellevue
To: Lawyer, Lucy
Firm: Mock Firm B

To narrow your Case search enter a Case Number or Party name

Case Number:

First Name: John

Middle Name:

Organization/Last Name: Johnson

Find Cases the From Attorney is participating in.

Select Cases **Cancel**

New Attorney Type: Select a Type

- From the list of available cases that appears after you click **Find**, place a check in the box (es) by the Case Number(s).
- Select the New Attorney Type from the drop down menu and click **Select Cases**.

Substitute Attorney

Court: Mock Court-Filing & Serving
From: Attorney, Adam
Firm: Mock Firm A-Bellevue
To: Lawyer, Lucy
Firm: Mock Firm B

To narrow your Case search enter a Case Number or Party name

Case Number:

First Name: John

Middle Name:

Organization/Last Name: Johnson

Find Cases the From Attorney is participating in.

Select Cases **Cancel**

New Attorney Type: Attorney for Plaintiff

Attorney: Attorney, Adam participates in the following cases.
 Select the case/party pair you wish to substitute to Attorney: Lawyer, Lucy

Case Name	Case Number	Party Name
<input checked="" type="checkbox"/> Johnson, John vs XYZ Corp et al	2012L000123	Johnson, John

- Verify your changes in the resulting screen and click **Submit**. The *Signature Documentation* page appears.
- Enter the **Document Title** and the **Transaction ID** of the electronically-filed document verifying your change, or attach an electronic copy of the supporting documentation.
- Click the **Submit** button.

✓ **Note:** In order to facilitate the requested changes, File & Serve must verify the change with any special jurisdictional rules, the Court and Court Record.