

File & Serve *Illinois*™

USER GUIDE
New Case Filing



File & Serve *Illinois*

NEW CASE FILING

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FILE & SERVE ILLINOIS RESOURCES

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.
- **File & Serve Illinois Web Site** contains helpful information for using the File & Serve Illinois system. The File & Serve Illinois Web Site houses our training registration information, user guides, pricing, and more. Click [here](#) to access the web site.
- **File & Serve Illinois Login Page** is where you can find password help, a link to the registration page, and links for help and contact information. Click [here](#) to access the login page.
- **Supreme Court of Illinois Electronic Filing Procedures and User Manual** contains the definitions and rules published by the Supreme Court. Click [here](#) to access the document.

FILE & SERVE ILLINOIS

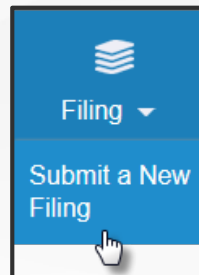
NEW CASE FILING OVERVIEW

This File & Serve Illinois User Guide provides a convenient source of information to help you efficiently file a new case.

Before You Begin

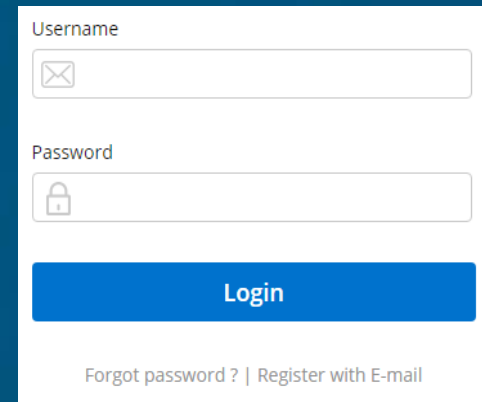
1. Refer to the appropriate court rules on electronic filing prior to using File & Serve Illinois to ensure that you are in compliance with local requirements.
2. Check our minimum system requirements to be sure your computer is correctly configured for using File & Serve Illinois.
3. If you need assistance, call our Client Support line at 1-888-529-7587.

To begin your new case filing, use the “Filing” drop down list and choose “Submit a New Filing”:



File & Serve Illinois™

Logging in to File & Serve Illinois

A screenshot of a login form on a white background. At the top, the label 'Username' is positioned above a text input field containing a white envelope icon. Below this, the label 'Password' is positioned above a text input field containing a white padlock icon. At the bottom of the form is a solid blue button with the word 'Login' in white. Below the button, the text 'Forgot password ? | Register with E-mail' is displayed in a smaller font.

1. Before using File & Serve Illinois, you must have an ID and Password. If you do not have these, click the *Register with E-mail* link on the Login page.
2. Open your internet browser and click [here](#) to access the login page.
3. Enter your ID and password and click **Login**.

STEP 1 – Case Type Tab

To file a new case using File & Serve Illinois, follow these steps.

1. Using the dropdown for “Is this filing for an existing case” choose “No”.
2. Choose your Jurisdiction. **Note:** you can easily find your jurisdiction by typing it into the type field.
3. Choose your Case Category.
4. Choose your Case Type.
5. Choose your payment account.
6. Choose your Attorney.
7. You must enter your Client Matter ID to proceed to the next step.
8. Click Next to move to Step 2

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

Jurisdiction
Peoria County Civil

Case Category
Chancery

Case Type
Accounting (\$276.00)


Payment Account
Training Account

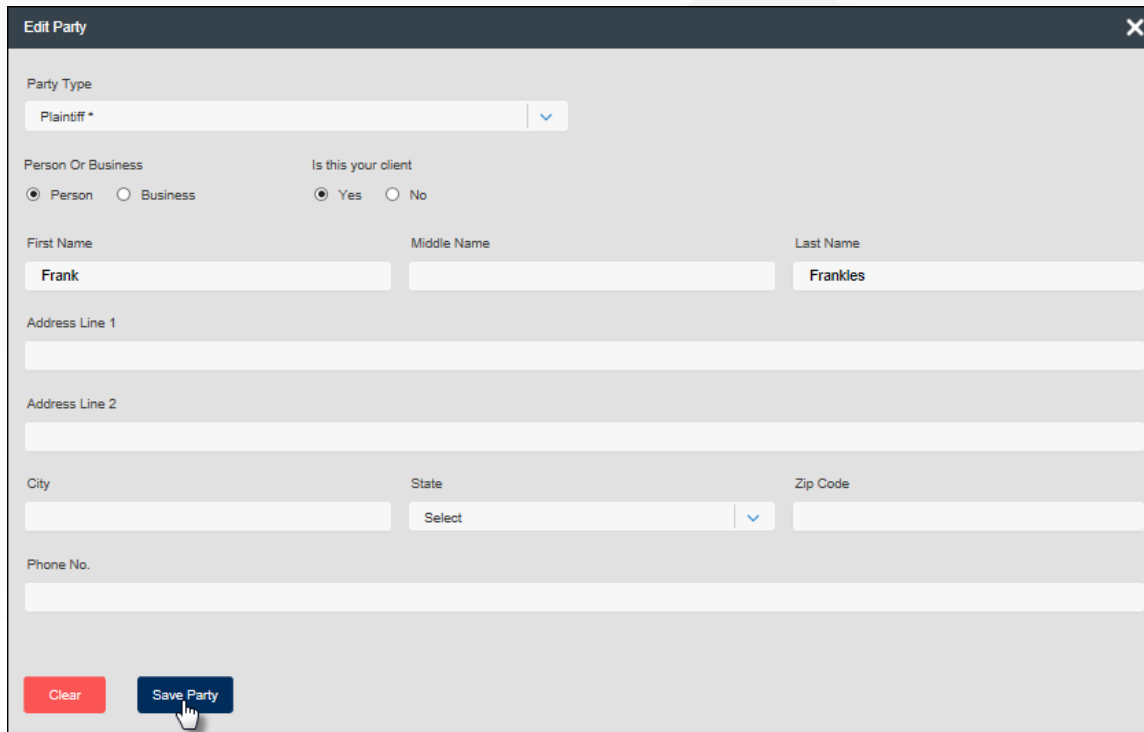
Attorney
Max Powers

Client Matter ID
FF.234.234

Next

STEP 2 – Parties Tab

1. Click “Create New Parties” to enter new parties. 
2. This will open a new screen.
3. Choose your party type. **Note:** *Mandatory party types are designated with an “*”. The system will not let you continue to the next step until the mandatory number of parties/types have been entered.*
4. Select the radio buttons for “Person or Business” and “Is this your client”.
5. Enter the optional address and telephone number.
6. Click “Save Party”.



Party Type
Plaintiff *

Person Or Business
 Person Business

Is this your client
 Yes No

First Name Middle Name Last Name
Frank Frankles

Address Line 1

Address Line 2

City State Zip Code
Select

Phone No.

Clear Save Party





Note: *You can type the first few letters to help find what you are looking for faster wherever there is an open type field (i.e. “Party Type”, “State”, etc.).*

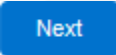
STEP 2 – Parties Tab (continued)

- Follow steps 1-6 above to add additional parties.
- The parties will be added to the “List of Parties”. **Note:** use the “Pencil/Paper” icon to edit party information, and use the “Trashcan” icon to delete parties.

List of Parties

Total Case Parties: 2

Sending Party	Party Type	Name	Actions
<input type="checkbox"/>	Plaintiff	Frank Frankles	 
<input type="checkbox"/>	Defendant	Jerry Gerri	 

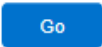
- Click “Next” to move to Step 3. 

STEP 2 – Parties Tab: Searching for a Party

If you have added multiple parties on the Parties Tab, to find a specific user to view, edit, or delete, follow these steps:



- Enter any/all of the users information in the “Party Name” field and click “Go”:

Party Name



List of Parties

Total Case Parties: 2

Sending Party	Party Type	Name	Actions
<input type="checkbox"/>	Plaintiff	Frank Frankles	 

- This will populate the screen with only the party(ies) that match your search criteria.

STEP 3 – Documents Tab

1. The Filing Type dropdown will default to “File” for a New Case Filing.
2. Choose the appropriate Filing code for your main document.
3. Enter the Filing Description for the lead document, or if you are adding supportive documents, for the list of documents being filed together.
4. Click “Browse” to search for your document on your computer.
5. Select the appropriate Document Category for your document.
6. Enter a document description 50 character max.
7. Click “+Add More Attachment(s)” and follow steps 8-11 to add supporting documents.

Filing Type: File and Serve

Filing code: Answer/Response/Denial (\$ 0)

Filing Description (Maximum 200 characters): Answer

Lead Document (25MB - Maximum 50 characters) **Generic Sample**
[Answer.docx](#) [Download Original](#)

Choose File No file chosen

Document Description (Title of Document - Maximum 200 characters): Answer

Document Category: Case Manager

+ Add More Attachment(s)

Note: the system will convert the native format of your documents into .PDF's and will attach both the native and .PDF format to the transaction.

STEP 3 – Documents Tab *(continued)*

8. Click “Browse” to search for your document on your computer.
9. Select the appropriate Document Category for your attachment.
10. Enter a document description.
11. Follow steps 7-10 to add additional supporting documents.

The screenshot displays two document attachment cards. Each card includes a file name, a 'Browse...' button, a 'Document Category' dropdown menu, and a 'Document Description' text field. The first card shows 'Generic Sample Exhibit.docx' with a 'Download Original' link and a description of 'Exhibit A- Returned Checks'. The second card shows 'Generic Sample Proposed Order.docx' with a 'Download Original' link and a description of 'Proposed Order'. A '+ Add More Attachment(s)' link is visible at the bottom right of the attachment area.

Attachment (25MB) [Generic Sample Exhibit.docx](#) [Download Original](#) Document Category
Public document
Document Description
Exhibit A- Returned Checks

Attachment (25MB) [Generic Sample Proposed Order.docx](#) [Download Original](#) Document Category
Public document
Document Description
Proposed Order

[+ Add More Attachment\(s\)](#)

12. When you have finished adding all attachments that are related to the lead document, scroll to the bottom of the page to complete the steps for attaching this group of documents.

STEP 3 – Documents Tab (continued)

13. Choose the checkbox and quantity for any optional services.
14. Add emails separated by commas for courtesy copies (optional).
15. Any communications to the clerk can be typed in the “Note to Clerk” field (optional).
16. Click “Save” to add this set of documents.

Optional Services



	Copies	Court Service	Unit Cost	Total Fee
<input type="checkbox"/>		CH - Residential Foreclosure/ Mediation fees	25.00	0.00
<input type="checkbox"/>		TX - Appearance	171.00	0.00
<input type="checkbox"/>		Law and LM over 50K	180.00	0.00
<input checked="" type="checkbox"/>	1	Alias Summons	5.00	5.00
<input type="checkbox"/>		Law and LM under 15K	50.00	0.00

Courtesy Copies (Optional)

Note to Clerk (Optional - Maximum 200 characters)

Your documents will be added to the transaction will be listed under “What documents are you filing?”.

What documents are you filing?

Filing Code	Filing Type	Description	Actions
Answer/Response/Denial	File and Serve	Answer	 

STEP 3 – Documents Tab *(continued)*

17. To add an additional lead document with or without attachments, begin with step two of this section.
18. If you have added all of your documents, choose the party that is “Responsible for Filing Fees”.

Responsible for Filing Fees


Frank Frankles 



19. Scroll to the bottom of the page to review your fees.
20. Click “Next” to move to Step 4.

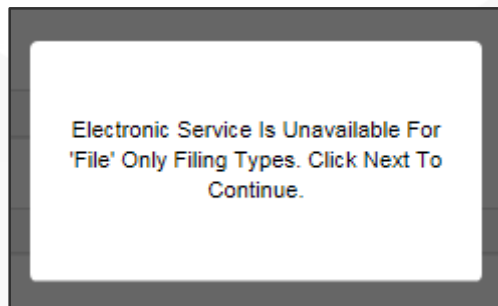
Fees	
Complaint	
Filing Fees	\$0
Alias Summons (1 * \$5.00)	\$5.00
Total This fees	\$5.00
Envelope Total	\$5.00

[Back](#) [Next](#)






STEP 4 – Service Contacts

1. You will receive the following message and can click “Next” to move to Step 5:



STEP 5 – Review & Submit

Review the Case Type, Parties, and Documents related to this transaction:


Case Type 								
Jurisdiction : Peoria County Civil				Case Category : Chancery				
Case Type : Accounting								
Payment Account: Training Account				Attorney : Max Powers				
Client Matter ID: FF234.234								
Parties 2 								
Sending Party	Party Type	Name			Address			
	Plaintiff	Frank Frankles						
	Defendant	Jerry Gerri						
Documents 								
Filing Code	Filing Description	Original Document	Converted Document	Optional Services	Document Category	Document Description	Courtesy Copies	Fees
Complaint (Lead Document) Note to Clerk:	Complaint	Generic Sample Complaint.docx	Generic Sample Complaint.pdf	Alias Summons(1 * \$5.00)	Case Manager	Complaint		\$5.00

- Use the “Pencil” icon or the Back button to move backward in the system to make edits.
- Click on the “Original Document” link to view the document in its native format.
- Click on the “Converted Document” link to view the document as a .PDF.

STEP 5 – Review & Submit (continued)

Review the party Responsible for Filing Fees, Service Contacts (if added), and Fees related to this transaction:

Responsible for Filing Fees : Frank Frankles

Service Contact 0 

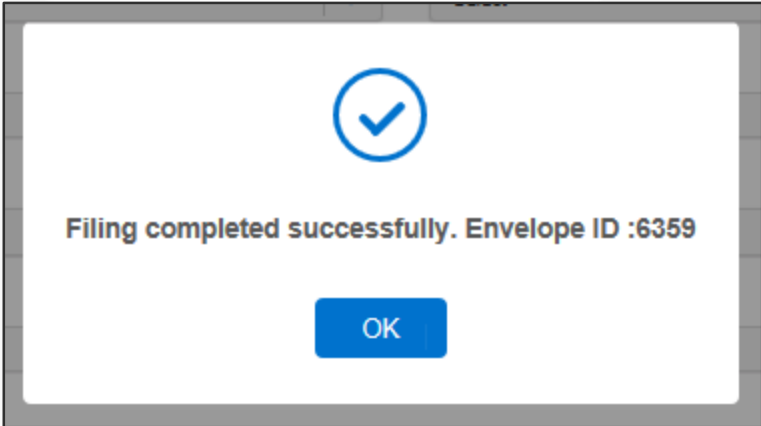
e-Serve	Name	Email	Public
Fees Calculation			
	Case Initiation Fee(USD) :		\$276.00
	Optional Service Fee(USD) :		\$5.00
	Total Service Fees(USD) :		\$0.00
	Total Service Tax Fees(USD) :		\$0.00
	Convenience Fee(USD) :		\$8.21
	Total Provider Service Fees(USD) :		\$2.99
	Total Provider Tax Fees(USD) :		\$0.18
	Total Court Service Fees(USD) :		\$0.00
	Total Fees(USD) :		\$292.38

[Back](#) [Submit](#)

- Use the “Pencil” icon or the Back button to move backward in the system to make edits.
- When you are satisfied with the details of the transaction, click “Submit”.

STEP 5 – Review & Submit (continued)

You will receive the following message with your envelope ID #:



The system will redirect you to your “Completed Filings” queue and your filing will be added to the list of completed filings:

Transaction ID	Envelope ID	Case Number	Jurisdiction	Created on	Submitted By	Action
101576	5167		Peoria County Civil	04/19/2017	Training Non-Admin	
101575	5165		Peoria County Civil	04/19/2017	Training Non-Admin	

- Click the “Eyeball” Icon to view the details of the filing.
- Click the “X” to cancel the filing (the “X” will only be available until the clerk reviews the filing).