

File & Serve *Illinois*™

OVERVIEW
User Dashboard



File & Serve *Illinois*

USER DASHBOARD

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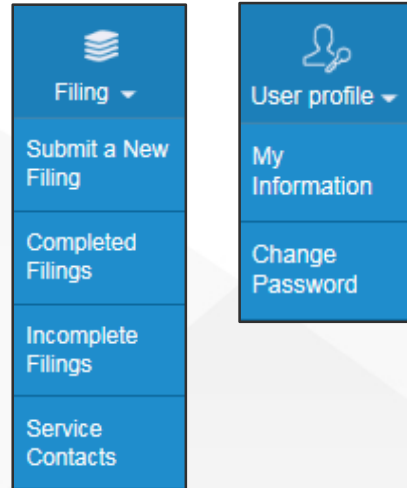
FILE & SERVE ILLINOIS RESOURCES

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.

SUBSEQUENT FILING OVERVIEW

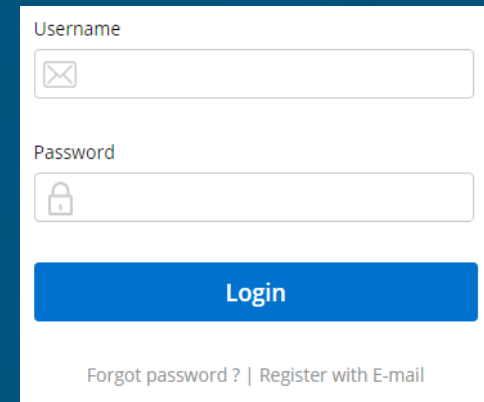
This File & Serve Illinois User Guide provides a convenient source of information to help you efficiently navigate your user dashboard. The dashboard contains the following dropdown lists:



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.

Logging in to File & Serve Illinois



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**.

SUBMIT A NEW FILING TAB

This Tab is used to submit a new case filing or file a subsequent transaction into an existing case. For more information on filing and serving documents, see our File & Serve Illinois user guides titled, “New Case Filing” and “Subsequent filing”.

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
Select

Case Category
Select

Case Type
Select

Payment Account
Select

Attorney
Select

Client Matter ID

Next

COMPLETED FILINGS TAB

This Tab is used to search for and view any filings that you have successfully submitted to the court. Users may also begin a new filing from this tab by clicking on “+New Filing”.

Completed Filings + New Filing

Search Jurisdiction

From Date (mm/dd/yyyy) To Date (mm/dd/yyyy)

Filing Of Filing Type

Case Category Filing Code

Transaction ID Envelope ID

Case Number Filing Status

Go Clear All

Search Result

Transaction ID	Envelope ID	Case Number	Jurisdiction	Created on	Submitted By	Action
101580	5172		Peoria County Civil	04/19/2017	Training Non-Admin	
101579	5171		Peoria County Civil	04/19/2017	Training Non-Admin	
101578	5170		Peoria County Civil	04/19/2017	Training Non-Admin	
101576	5167		Peoria County Civil	04/19/2017	Training Non-Admin	

1

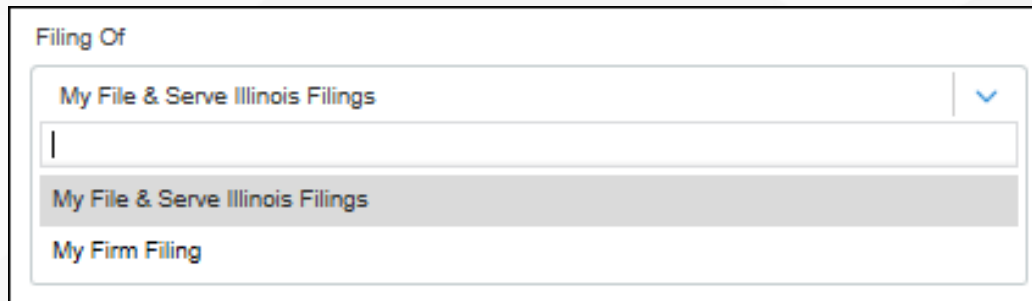
COMPLETED FILINGS TAB *(continued)*

There are 4 searches that can be performed on the Completed Filings Tab:



- Select
- Daily Docket Search
- Case History
- Docket Search
- Transaction Status

Note: For all searches, Firm Users can choose to access their own filings, or to access all firm filings. To select the filings you wish to see, use the “Filing Of” dropdown on the filter list.



Filing Of

My File & Serve Illinois Filings

My File & Serve Illinois Filings

My Firm Filing

COMPLETED FILINGS TAB *(continued)*

Daily Docket Search

The Daily Docket Search allows users to search for filings that they submitted in a specific date. Use the dropdowns and type fields to enter your search criteria and click “Go” to run the search. “Clear All” will clear the search fields.

Search	<input type="text" value="Daily Docket"/>	▼
*Jurisdiction	<input type="text" value="Select"/>	▼
* From Date (mm/dd/yyyy)	<input type="text" value="4/19/2017"/>	
*To Date (mm/dd/yyyy)	<input type="text" value="4/19/2017"/>	
Filing Of	<input type="text" value="My File & Serve Illinois Filings"/>	▼
Filing Type	<input type="text" value="Select"/>	▼
*Case Category	<input type="text" value="Select"/>	▼
Filing Code	<input type="text" value="Select"/>	▼
Transaction ID	<input type="text"/>	
Envelope ID	<input type="text"/>	
Case Number	<input type="text"/>	
Filing Status	<input type="text" value="Select"/>	▼
	<input type="button" value="Go"/>	<input type="button" value="Clear All"/>

COMPLETED FILINGS TAB *(continued)*

Case History Search

The Case History Search allows users to search for filings that they submitted in a specific case. Use the dropdowns and type fields to enter your search criteria and click “Go” to run the search. “Clear All” will clear the search fields.

Search	*Jurisdiction
<input type="text" value="Case History"/>	<input type="text" value="Select"/>
* From Date (mm/dd/yyyy)	*To Date (mm/dd/yyyy)
<input type="text" value="4/19/2017"/>	<input type="text" value="4/19/2017"/>
Filing Of	*Filing Type
<input type="text" value="My File & Serve Illinois Filings"/>	<input type="text" value="Select"/>
Case Category	Filing Code
<input type="text" value="Select"/>	<input type="text" value="Select"/>
Transaction ID	Envelope ID
<input type="text"/>	<input type="text"/>
Case Number	Filing Status
<input type="text"/>	<input type="text" value="Select"/>
<input type="button" value="Go"/> <input type="button" value="Clear All"/>	

COMPLETED FILINGS TAB *(continued)*

Docket Search

The Docket Search allows users to search for filings that they submitted and sort them by document type (e.g. Answers, responses to Discovery, etc.). Use the dropdowns and type fields to enter your search criteria and click “Go” to run the search. “Clear All” will clear the search fields.

Search <input type="text" value="Docket Search"/>	*Jurisdiction <input type="text" value="Select"/>
* From Date (mm/dd/yyyy) <input type="text"/>	*To Date (mm/dd/yyyy) <input type="text"/>
Filing Of <input type="text" value="My File & Serve Illinois Filings"/>	Filing Type <input type="text" value="Select"/>
*Case Category <input type="text" value="Select"/>	Filing Code <input type="text" value="Select"/>
Transaction ID <input type="text"/>	Envelope ID <input type="text"/>
Case Number <input type="text"/>	Filing Status <input type="text" value="Select"/>
<input type="button" value="Go"/> <input type="button" value="Clear All"/>	

COMPLETED FILINGS TAB *(continued)*

Transaction Status Search

The Transaction Status Search allows users to search for filings and view what Clerk Review status they are in. Use the dropdowns and type fields to enter your search criteria and click “Go” to run the search. “Clear All” will clear the search fields.

Search	*Jurisdiction
<input type="text" value="Transaction Status"/>	<input type="text" value="Select"/>
* From Date (mm/dd/yyyy)	*To Date (mm/dd/yyyy)
<input type="text" value="4/12/2017"/>	<input type="text" value="4/19/2017"/>
Filing Of	Filing Type
<input type="text" value="My File & Serve Illinois Filings"/>	<input type="text" value="Select"/>
*Case Category	*Filing Code
<input type="text" value="Select"/>	<input type="text" value="Select"/>
Transaction ID	Envelope ID
<input type="text"/>	<input type="text"/>
Case Number	Filing Status
<input type="text"/>	<input type="text" value="Select"/>
<input type="button" value="Go"/> <input type="button" value="Clear All"/>	

COMPLETED FILINGS TAB *(continued)*

Return for Correction

The Court has the ability to return a filing to you for correction. If the Court rejects a document and returns it for correction, follow these steps:

1. Click on the “Eyeball” icon to view the transaction details.

Transaction ID	Envelope ID	Case Number	Jurisdiction	Created on	Submitted By	Action
101580	5172		Peoria County Civil	04/19/2017	Training Non-Admin	
101579	5171		Peoria County Civil	04/19/2017	Training Non-Admin	
101578	5170		Peoria County Civil	04/19/2017	Training Non-Admin	
101576	5167		Peoria County Civil	04/19/2017	Training Non-Admin	

2. Find the rejected document.

Documents										
Status	Filing Code	Filing Description	Original Document	Converted Document	Stamped Document	Optional Services	Document Category	Document Description	Courtesy Copies	Fees
Rejected (04/19/2017 10:38)	Complaint (Lead Document) Note to Clerk:	Complaint	Generic Sample Complaint.docx	Generic Sample Complaint.pdf			Case Manager	Complaint		\$0.00

COMPLETED FILINGS TAB *(continued)*

Return for Correction

3. Hover over the document icon for the “Reject Reason”.

Documents										
Status	Filing Code	Filing Description	Original Document	Converted Document	Stamped Document	Optional Services	Document Category	Document Description	Courtesy Copies	Fees
		Complaint	Generic Sample Complaint.docx	Generic Sample Complaint.pdf			Case Manager	Complaint		\$0.00

Filing Review Comments :- Please refile with proper redactions. Reject Reason :- Document not properly redacted

3. Click on the “Curve Arrow” icon to re-submit with corrections.

Transaction ID	Envelope ID	Case Number	Jurisdiction	Created on	Submitted By	Action
101580	5172		Peoria County Civil	04/19/2017	Training Non-Admin	
101579	5171		Peoria County Civil	04/19/2017	Training Non-Admin	
101578	5170		Peoria County Civil	04/19/2017		
101576	5167		Peoria County Civil	04/19/2017	Training Non-Admin	

Return For Correction

INCOMPLETE FILINGS TAB

This Tab is used to search for and view any filings that you or your firm has not completed and that have been saved in the system. To search for a specific incomplete filing, enter your search criteria and click “Go”. Click “Complete Filing” to resume and complete it. Users may also begin a new filing from this tab by clicking on “+New Filing”.

Incomplete Filings

+ New Filing

From Date (mm/dd/yyyy)

To Date (mm/dd/yyyy)

Jurisdiction ▼

Transaction ID

Filing Of ▼

Go

Search Result

Transaction ID	Jurisdiction	Created on	Created By	Action
101574	Peoria County Civil	04/19/2017	Dee Lott	Complete Filing Delete Filing
101070	Peoria County Civil	03/21/2017	Dee Lott	Complete Filing Delete Filing

1

SERVICE CONTACTS TAB



This Tab is used to search for and view service contacts that have been saved by your firm or to add new service contacts. To search for a specific service contact, enter your search criteria and click “Search”. This will populate the screen with only the contact(s) that match your search criteria. Use the “Paper and Pencil” icon to edit the contact and use the “Trashcan Icon” to delete the contact.

Service Contact

First Name


Last Name

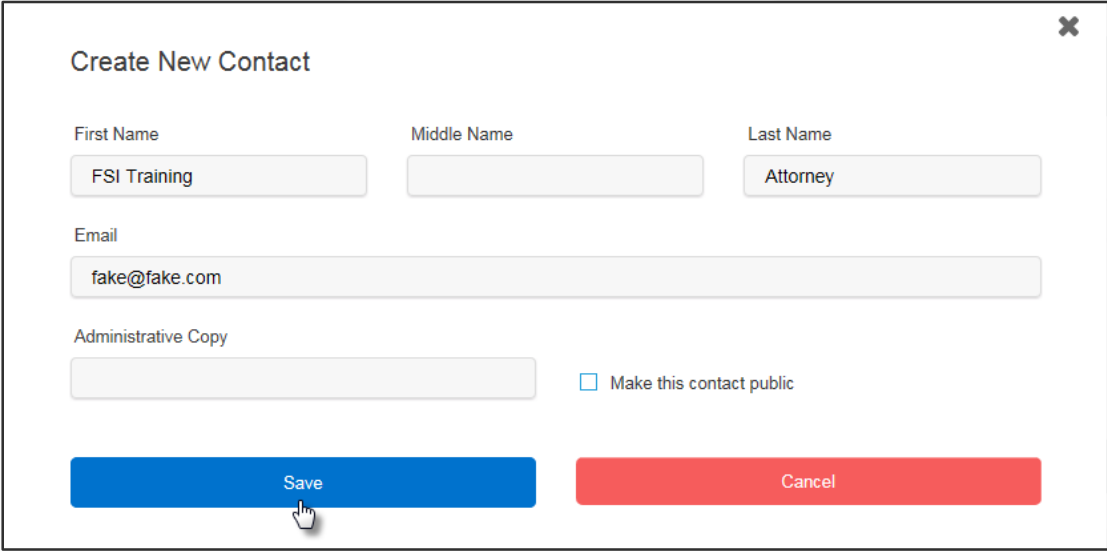
Email Id

Name	Email Id	Action
FSI Training Attorney	fake@fake.com	 



SERVICE CONTACTS TAB *(continued)*

To add a service contact, follow these steps:

1. Click on the “Add New Service Contact” button: 
2. This will open a new screen:



3. Enter the service contact’s information.
4. If anyone in your firm needs to be copied on the service contact’s service, enter one or more email addresses separated by commas in the “Administrative Copy” field.
5. To add the contact to the public list, click the box for “Make this contact public”.
6. Click “Save” to add the contact to your list.

Name	Email Id	Action
FSI Training Attorney	fake@fake.com	 

MY INFORMATION TAB

This Tab is used to update your user information in the system. To update your information, make the changes in the type fields and click “Submit” to save your changes.

My Information

First Name	Middle Name	Last Name
<input type="text" value="Training"/>	<input type="text"/>	<input type="text" value="Non-Admin"/>
Email		
<input type="text" value="fsil_training+1@outlook.com"/>		
<input type="button" value="Submit"/>		

CHANGE PASSWORD TAB

This Tab is used to change your password and/or security question in the system. To change your password and/or security question, enter the requested information in the type fields and click “Submit” to save your changes.

Change Password

Old Password	New Password	Re-enter New Password
<input type="text"/>	<input type="text"/>	<input type="text"/>
Security Question		
<input type="text" value="What is your favorite color?"/>		
Enter Security Answer		
<input type="text"/>		
<input type="button" value="Submit"/>		