

File & Serve *Illinois*™

USER GUIDE

Reviewing Filings & Documents



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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. They are available 24/7/365.
- **File & Serve *Illinois* Resource Center** is available to assist you with How-To Guides, register for Live Webinars, watch On-Demand videos, and much more! Please visit <http://fileandservexpress.com/illinois/training.html> for more information.

SUBSEQUENT FILING OVERVIEW

The File & Serve *Illinois* User Guide provides a convenient source of information to help you efficiently eFile into an existing 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 1-888-247-2051. They are available to help you 24/7/365.

Logging in to File & Serve *Illinois*

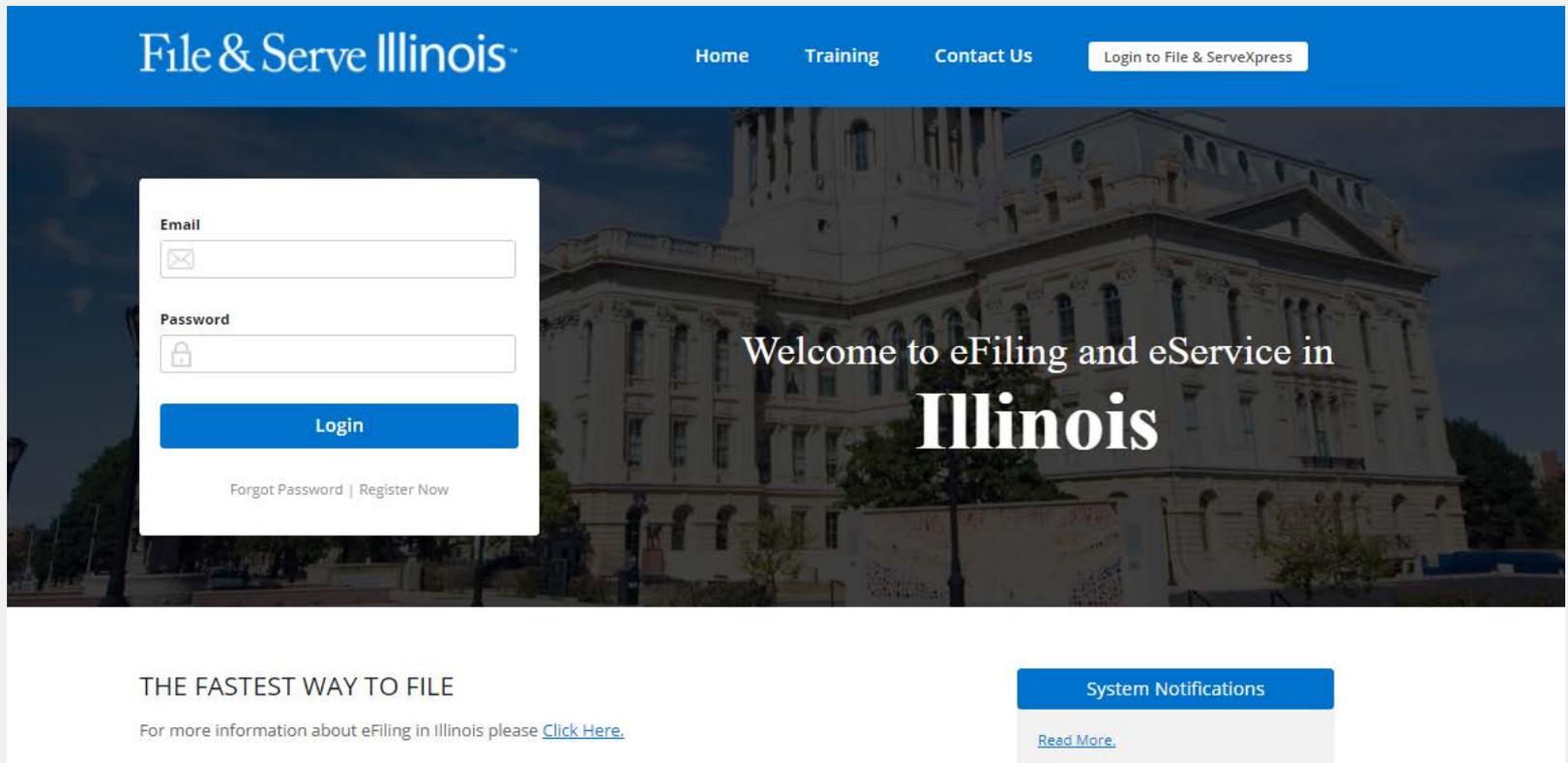
The screenshot shows a login form with the following elements:

- Email:** A text input field with an envelope icon on the left.
- Password:** A text input field with a lock icon on the left.
- Login:** A prominent blue button with the text "Login" in white.
- Links:** Below the button, there are two links: "Forgot Password" and "Register Now", separated by a vertical bar.

1. Open IE, Chrome, or Firefox go to www.fileandserveillinois.com.
2. Enter your Username and Password and click **Login**.
3. **If you do not have a Username/Password, please contact your Firm Administrator.**

GETTING STARTED

1. Access the File & Serve *Illinois* login page via www.fileandserveillinois.com
2. Enter your Username/Password and click “**Login**”.



1. On the Completed Filings page, and in the envelope ID message; links are displayed for you to select, if needed, “process service, skip trace, or courtesy copy for the judge(s). When selected, a new tab in the browser will display an ATG LegalServe “Service Request” form.

The screenshot displays the ATG LegalServe website header and a 'COURTHOUSE REQUEST FORM'. The header includes navigation links (HOME, ABOUT US, RATES, CLIENT PORTAL), the ATG LegalServe logo, and contact information: 105 West Adams Street, Suite 1350, Chicago, IL 60603, 312-855-0303, info@atglegalserve.com, and Illinois License No. 117.001494. The form title is 'COURTHOUSE REQUEST FORM'. The 'Contact Information' section contains the following fields:

Service Class:	<input type="text" value="Standard"/>
Due Date:*	<input type="text"/>
Firm:*	<input type="text"/>
Contact Name:	<input type="text"/>
Contact Phone:	<input type="text"/>
Contact Email:*	<input type="text"/>
Contact Address:	<input type="text"/>

COMPLETED FILINGS *(continued)*

2. The system will redirect you to your **Completed Filings** tab and your filing will be added to the list of completed filings.
3. You will be able to view the Transaction Summary by clicking on the “**eyeball**” icon next to the envelope under “**Search Results.**” You will be able to print the Transaction Summary.
4. Until the court clerk Accepts, Rejects, or Returns the envelope, you can cancel it. Click on the “**X**” next to the transaction to “**Cancel entire Envelope**”.

Completed Filings + New Filing

Search [] Select a Jurisdiction []

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

Sort By [] Filing Type []

Case Category [] Filing Code []

Case Number [] Envelope ID []

Filing Status []

Go Clear All

Search Results

Need [process service](#), [skip trace](#) or [courtesy copies](#) ?

Show 25 filings per page Search

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
37316			Clark County	03/21/2018	Training Admin	

Clicking the “X” will cancel the envelope so you can start over.

Submitted By Action

Cancel entire Envelope

COMPLETED FILINGS *(continued)*

5. Once the clerk accepts your filing, you will see a “+” icon next to the transaction. You can click on the “+” sign going forward to e-file/e-serve into the now existing case.
6. You can search for a case by entering a partial case name or jurisdiction under “Search”. You can also limit the number of envelopes you see under the “Show” feature.

Note: The search bar in the Incomplete and Completed Filings page does not recognize a search using the combination of three special characters – colon (:), double quote (“), and question mark (?). Some jurisdictions will not allow the case name to be populated and will be “blank” as shown below.

Search Results

Need [process service](#), [skip trace](#) or [courtesy copies](#) ?

Show filings per page

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
37316			Clark County	03/21/2018	Training Admin	
20141		2017	Clark County	10/19/2017	Training Admin	
20101		2017	Clark County	10/19/2017	Training Admin	

LOCATING YOUR FILE-STAMPED DOCUMENT

Step In File & Serve Illinois

Once you receive the Accepted notification from eFile Illinois, you will be able to view your file-stamped document within File & Serve *Illinois*. Please follow these steps using File & Serve *Illinois* to locate:

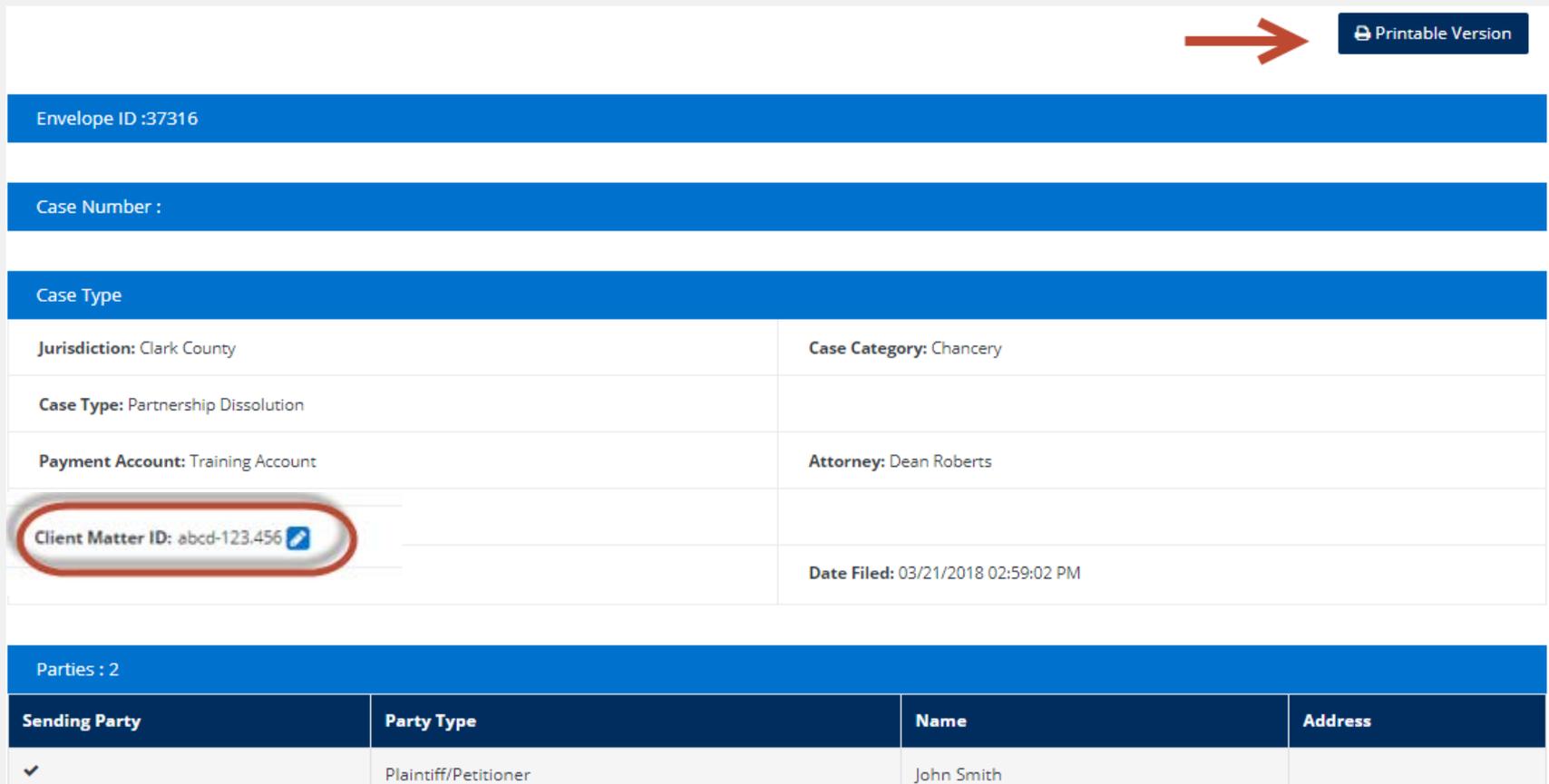
1. Go to your Completed Filings page.
2. Find the recently accepted transaction.
3. Click on the “**eyeball**” icon.
4. Scroll down to the Documents section and find the “**Stamped Document**” column.
5. The link to your file-stamped document will be there. This link will remain available for viewing at any time.

Documents									
Status	Filing Code	Filing Description	Original Document	Converted Document	Stamped Document	Optional Services	Document Category	Document Description	Fees
Accepted 04/19/2017 01:21:43 P M	Complaint (Lead Document) Note to Clerk:	Complaint	Generic Sample Complaint.pdf		Generic Sample Complaint.pdf		Non-Confidential	Complaint	\$ 0.00



REVIEWING YOUR TRANSACTION SUMMARY

1. You will be able to print the transaction summary for your records by clicking, **“Printable Version”**.
2. Users can edit and update the client matter number on a filing after it has been submitted.



The screenshot shows a transaction summary page. At the top right, a red arrow points to a dark blue button labeled "Printable Version" with a printer icon. Below this, the summary is organized into sections with blue headers:

- Envelope ID :** 37316
- Case Number :**
- Case Type**

Jurisdiction: Clark County	Case Category: Chancery
Case Type: Partnership Dissolution	
Payment Account: Training Account	Attorney: Dean Roberts
Client Matter ID: abcd-123.456 	Date Filed: 03/21/2018 02:59:02 PM
- Parties : 2**

Sending Party	Party Type	Name	Address
✓	Plaintiff/Petitioner	John Smith	

REVIEWING YOUR TRANSACTION SUMMARY

(continued)

- You will also be able to view the **real-time status of service** (see screen shot below). Once the service contact clicks on the document link from the Notification of Service email from the eFiling Manager, eFile Illinois; the “unopened” will change to the date and time the link was “clicked”.

Note: The Status will reflect “**Not Sent**” until the clerk accepts. Once the clerk accepts your document(s), service will be delivered, and the status will update to “**Sent.**”

Service Contact: 9						
e-Serve	Name	Email Address	Public	Party Name	Status	Date Opened
Yes	Suzy Jp	Suzy@email.com	No	case	Not Sent	Unopened
Yes	Kelsey Smith	ksmith@lawfirm.com	No	case	Not Sent	Unopened

REVIEWING YOUR TRANSACTION SUMMARY

(continued)

- You will also be able to view the **clerk's comments** under the Documents section.

Documents									
Status	Filing Code	Filing Description	Original Document	Converted Document	Stamped Document	Optional Services	Document Category	Document Description	Fees
Rejected 06/16/2017 11:52:06 AM	Service Document Clerk Comments  Filing Review Comments : No rejection comment was provided. Please contact the court into which you are filing for more information. Reject Reason : Format Error Note to Clerk:	Answer	Generic Sample Answer.pdf					Answer filed on behalf of Roger Smith	\$ 0.00

REVIEWING SUBMITTED FILINGS

1. You can review your submitted filings on the Completed Filings page. Under the drop-down menu “**Sort By**” it will default to “**My Filings**”. Enter information into at least one the filters and select “**Go**”. Your transaction will be displayed under “**Search Results**”.
2. You can review submitted filings by firm members by clicking on the drop-down menu “**Sort By**” and selecting “**My Firm’s Filing**”. Enter information into at least one the filters and select “**Go**”. Your transaction will be displayed under “**Search Results**”.

The screenshot shows the 'Completed Filings' interface. At the top right is a '+ New Filing' button. Below the header are several filter fields: 'Search', 'Select a Jurisdiction', 'From Date (mm/dd/yyyy)', 'To Date (mm/dd/yyyy)', 'Sort By', 'Filing Type', 'Filing Code', 'Case Number', and 'Envelope ID'. A red arrow points to the 'Sort By' dropdown menu, which is currently set to 'My Filings'. Below the filters are 'Filing Status' and 'Go' and 'Clear All' buttons.

REVIEWING SUBMITTED FILINGS (continued)

- 3. When searching under “**My Firm’s Filings**,” you will be able to see who submitted the filing under the column, “**Submitted By**”.
- 4. You can also click on any column header to put into ascending or descending order.
- 5. The “*tiny triangles*”  indicates the data being sorted on and in which direction.

Search Results

Need [process service](#), [skip trace](#) or [courtesy copies](#) ?

Show filings per page

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
1328684		18L0360	St. Clair County	06/28/2018	File And Serve	
1321161		18L0360	St. Clair County	06/27/2018	File And Serve	
1319198		18L0360	St. Clair County	06/27/2018	File And Serve	

REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS

If you receive a “**Return for Correction**” or a “**Rejected**” notification from eFile Illinois, please follow these steps to upload and submit your corrected documents:

1. Log onto File & Serve *Illinois* and select the “**Completed Filings**” page from the “**Filing**” drop-down menu.
2. Find the transaction with the “back arrow” in **red**.
3. Click on the back arrow to open up the transaction.

The back arrow allows you to open up the transaction & easily re-submit the corrected documents.

Search Results

Need [process service](#), [skip trace](#) or [courtesy copies](#) ?

Show  filings per page

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
6191			McLean County	05/03/2017	Training Admin	 

REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS *(continued)*

4. All fields in Step-1 will be auto-populated. Adjust if necessary. Click “**Next**” to move to Step 2-Parties.
5. Select the “**Sending Party**” if not selected. Click “**Next**” to move to Step 3-Documents. (see next slide)
6. Click on the “**pencil icon**” to open up the document(s) submitted for this transaction. (see next slide)

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	Case Type Tort - Money Damages (\$267.00)
Jurisdiction McLean County	Payment Account Training Account
Case Category Law	Attorney Max Powers
	Client Matter ID 123456

 [Next](#)

REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS (continued)

Case Details

STEP 1 - Case Type **STEP 2 - Parties** STEP 3 - Documents STEP 4 - Service Contact STEP 5 - Review & Submit

Who are the parties?
[Create New Parties](#)

Party Name
 [Go](#)

List of Parties

Total Case Parties: 2

Sending Party	Party Type	Name	Actions
<input checked="" type="checkbox"/>	Party type not available	John Doe	✎ 🗑
<input type="checkbox"/>	Party type not available	Smith Store	✎ 🗑

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

Step 2-Parties:
Select the
“Sending Party”
if the box isn’t
selected.

Step 3-Documents:
Click on the pencil
icon to upload the
corrected
document(s).

Case Details

STEP 1 - Case Type STEP 2 - Parties **STEP 3 - Documents** STEP 4 - Service Contact STEP 5 - Review & Submit

What documents are you filing?

Your Current Envelope Size: 141.765 KB Max Envelope Size: 50 MB
Max File Size Per Document: 25 MB

Filing Code	Filing Type	File Size	Description	Actions
Motion	File and Serve	141.765 KB	motion	✎ 🗑

REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS *(continued)*

7. Click on the “**Browse**” button to grab the corrected document.
8. Enter your Note to Clerk.
9. Click on “**Update**” to save the corrected documents to the envelope.
10. Repeat the steps for all Lead Documents and corresponding attachments in the envelope that have been “Returned for Correction” or “Rejected”.
11. Enter any email address(es) of legal team members into the “Courtesy Notification” field to ensure it is sent to them.

Case Details

STEP 1 - Case Type STEP 2 - Parties **STEP 3 - Documents** STEP 4 - Service Contact STEP 5 - Review & Submit

What documents are you filing? Max Envelope Size: 50 MB
Your Current Envelope Size: 141.765 KB Max File Size Per Document: 25 MB

Filing Code	Filing Type	File Size	Description	Actions
Motion	File	141.765 KB	motion	 

[Add Document](#)

Responsible for Filing Fees

WELCO MANUFACTURING COMPANY 

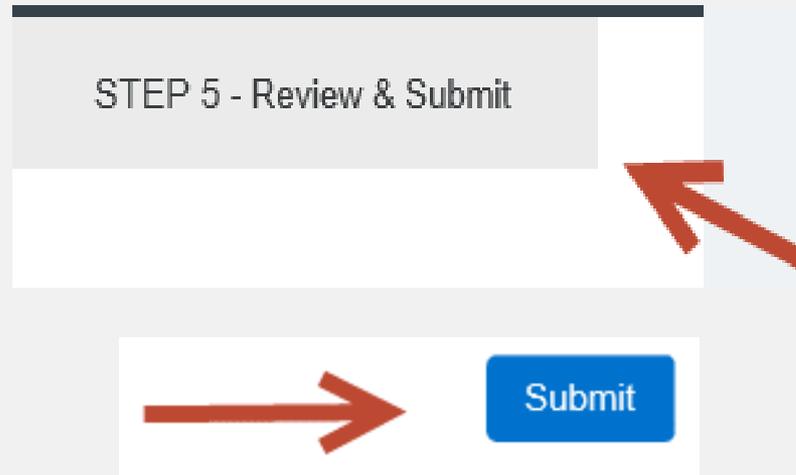
Send Accepted Notifications To: (Optional Field. Add email address for each recipient you want to receive accepted notifications.) 

nemken@fileandserve.com, wkhan@fileandserve.com

(Maximum character limit is 160 characters.)

REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS *(continued)*

12. Click “**Next**” to move to Step 5-Review & Submit, or click on the “Step 5-Review & Submit” tab.
13. Review the transaction and click on the “pencil icon” if any further corrections need to be made in any one section.
14. Click on “**Submit**” to file with the court and serve on selected parties (if applicable).
15. You will receive a new envelope ID and the transaction will be displayed in “**Completed Filings.**”



INCOMPLETE FILINGS

1. If needed, you can log out of File & Serve *Illinois* in the middle of a transaction and finish the transaction at a later date.
2. To complete the filing, please log back into File & Serve *Illinois*. Go under the “**Filing**” drop-down menu and select “**Incomplete Filings**”.
3. Under “**Search Results**,” you will see the transaction. Click on “**Complete Filing**” under the Action column to complete and submit your filing.

The screenshot displays the File & Serve Illinois user interface. At the top, there are navigation icons for 'Filing' and 'Firm Admin'. A dropdown menu is open under 'Filing', showing three options: 'Submit a New Filing', 'Completed Filings', and 'Incomplete Filings'. A red arrow points to the 'Incomplete Filings' option. Below the menu, there is a search filter section with 'Sort By' (set to 'My Filings'), 'Jurisdiction' (set to 'Select'), 'From Date (mm/dd/yyyy)', and 'To Date (mm/dd/yyyy)' fields. A 'Go' button is located to the right of these fields. Below the search filters, the 'Search Results' section is visible, showing '25 filings per page' and a search input field with a red arrow pointing to it. The search results are displayed in a table with the following columns: Jurisdiction, Case Name, Case Number, Created on, Created By, and Action. The table contains two rows of data, both for Clark County, with Case Numbers 05/31/2018 and 05/31/2018, and Created By Training Admin. The Action column for each row contains the links 'Complete Filing | Delete Filing'.

Jurisdiction	Case Name	Case Number	Created on	Created By	Action
Clark County			05/31/2018	Training Admin	Complete Filing Delete Filing
Clark County			05/31/2018	Training Admin	Complete Filing Delete Filing

INCOMPLETE FILINGS (continued)

4. If you need to complete a filing by another firm member, please log into File & Serve *Illinois*.
5. Go under the “**Filing**” drop-down menu and select “**Incomplete Filings**”.
6. Under “**Sort By**”, click on the drop-down menu and select “**My Firm’s Filing**” and select “**Go**”.
7. Search for the firm filer under the “**Created By**” column. You can also enter their name in the “**Search**” field.
8. Once you find the filing(s), click on “**Complete Filing**” under the Action column to complete and submit the filing.

Incomplete Filings + New Filing

Sort By
My Filings
My Filings
My Firm's Filings

Jurisdiction
Select

To Date (mm/dd/yyyy)

Go

Search Results

Show 25 filings per page Search:

Jurisdiction	Case Name	Case Number	Created on	Created By	Action
Clark County			05/31/2018	Training Admin	Complete Filing Delete Filing
Clark County			05/31/2018	Training Admin	Complete Filing Delete Filing

PROVISIONAL FILING

1. If your case is not found, you will receive the message below.
2. Click “**Proceed**” to manually enter the case information and go through the 5-step process to complete your filing.

If your case is not listed above, you are attempting to efile into a case that has yet to receive an electronic submission within efileIllinois.gov and the case is not searchable from the court's case management system.

You are still able to file into the case, but you will first be required to manually input case information. Any additional filings on this case will not require the manual data entry.

Proceed

Overview

Users can view eService notifications for which they are served when they log into the application and continue to view them while in the system. The pre-requisites for receiving these notifications are:

1. The user should be a registered user of an EFSP and the user should have at least one submitted filing accepted by the court.
2. They must be a service recipient on the case to receive eService notifications.

A menu item “INBOX” will be available at the top of the application. This icon will display a number indicator for the count of notifications which have been unread by the user.

The screenshot displays the top navigation bar of the File & Serve Illinois application. On the left, the logo "File & Serve Illinois™" is visible. On the right, the user's name "User Thomas" is displayed next to a profile icon. Below the navigation bar, there are two icons: "Inbox" (a bell icon with a red circle containing the number "15") and "Filing" (a briefcase icon). A red box highlights the "Inbox" icon, and a red arrow points to it from the left. Below the navigation bar, there is a dark grey header for "Incomplete Filings" with a blue "+ New Filing" button on the right. The main content area contains a search and filter section with the following elements:

- Sort By:** A dropdown menu currently set to "My Filings".
- Jurisdiction:** A dropdown menu currently set to "Select".
- From Date (mm/dd/yyyy):** An empty text input field.
- To Date (mm/dd/yyyy):** An empty text input field.
- Go:** A blue button located at the bottom right of the search section.

A dropdown menu will display showing each of the unread notifications by case name. An “All Notifications” menu item will always display at the bottom of the dropdown.

File & Serve Illinois™

Inbox 15 Filing

DFG FDGDFG VS. FDGDFG FDGDFG

SMITH GEORGE VS. SMITH GREG

SMITH GEORGE VS. SMITH GREG

SMITH GEORGE VS. SMITH GREG

CAROLCAROLCAROLCAR VS. EVELYN EVELYN EVEL

CAROLCAROLCAROLCAR VS. EVELYN EVELYN EVEL

All notifications...

Case Number: 20181625492

Jurisdiction: Cook County - Municipal Civil - District 1 - Chicago Case Category: Civil

Case Type: Administrative Review - Parking Violation Attorney: User Thomas

Case Title: DFG FDGDFG VS. FDGDFG FDGDFG Served Date: 10/02/2018 03:54 PM

Filing Code: Alias Citation - Issued And Returnable

Description: to test service Document: Summary Filing test space.pdf

Recipient: User Thomas Firm Name: Law Firm Illinois 09-25-2018

Submitter: Admin Jeffery Firm Name: Law Firm Illinois 05-31-2018

Parties: 2

Party Type	Name	Address
Defendant	FDGDFG FDGDFG	STREET NOT PROVIDED, CITY NOT PROVIDED, IL, 60601-1
Plaintiff	DFG FDGDFG	STREET NOT PROVIDED, CITY NOT PROVIDED, IL, 60601-1

1. Select an unread notification in the dropdown to be directed to the filing details including a link to the document. Note: Viewing a line item will also mark the notification as read and it will decrease the count of unread notifications.
2. Select “All Notifications” to view a paginated list of both read and unread notifications (screenshot on next page).

eSERVICE INBOX (continued)

Inbox

Show 10 notifications per page 1 Search

Envelope Id	Case Name	Case Number	Jurisdiction	Date	Recipient	Document	Action
85004	Azam Vaziri v. USA Athletic Club LLC	18-L-000005	Kane County	09/27/2018	User Thomas	sample.pdf 3	
85004	Azam Vaziri v. USA Athletic Club LLC	18-L-000005	Kane County	09/27/2018	User Thomas	20180927150410853_11499_TESTINGDOCUMENT.pdf	4
84892	BUTTREY FOODS VS. CUNNINGHAM LINDA	2018L005814	Cook County - Law - District 1 - Chicago	09/26/2018	User Thomas	20180926115235554_11491_RTF with white space in between File1.pdf	5
85080	CAROLCAROLCAROL CAR VS. EVELYN EVELYN EVEL	20181102225	Cook County - Municipal Civil - District 1 - Chicago	09/28/2018	User Thomas	test.pdf	
85080	CAROLCAROLCAROL CAR VS. EVELYN EVELYN EVEL	20181102225	Cook County - Municipal Civil - District 1 - Chicago	09/28/2018	User Thomas	gre_research_validity_data.pdf	
85080	CAROLCAROLCAROL CAR VS. EVELYN EVELYN EVEL	20181102225	Cook County - Municipal Civil - District 1 - Chicago	09/28/2018	User Thomas	SampleDOCFile_500kb.pdf	

Showing 10 Notification(s) of 18 6 Previous **1** 2 Next

A paginated list of “All notifications” will default to be sorted by date. All columns are searchable using the Search field and sortable except the document and action columns using the column headers.

1. All column headers are searchable using the Search field.
2. All columns are sortable using the column headers.
3. Click the document title to view the PDF.
4. Click the eyeball icon to view the filing details.
5. Click the plus sign to start a subsequent filing into the case.
6. Use *Previous*, the page numbers, and *Next* to move through the pages of notifications.

HAVE QUESTIONS? OUR TEAM IS HERE TO HELP. CALL 1-888-529-7587

We are available 24/7/365.

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