File & Serve Illinois™

USER GUIDE
Subsequent Filing

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FILE & SERVE ILLINOIS RESOURCES

File & Serve *Illinois*

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

File & Serve *Illinois*™

The File & Serve *Illinois* User Guide provides a convenient source of information to help you efficiently eFile into an existing case.

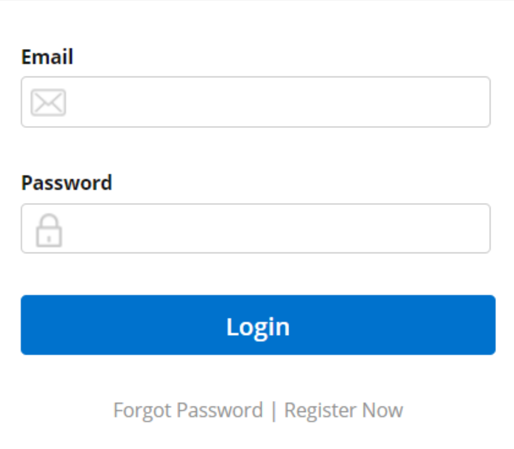
Before You Begin

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*



1. Open IE, Chrome, or Firefox go to **www.fileandserveillinois.com**.

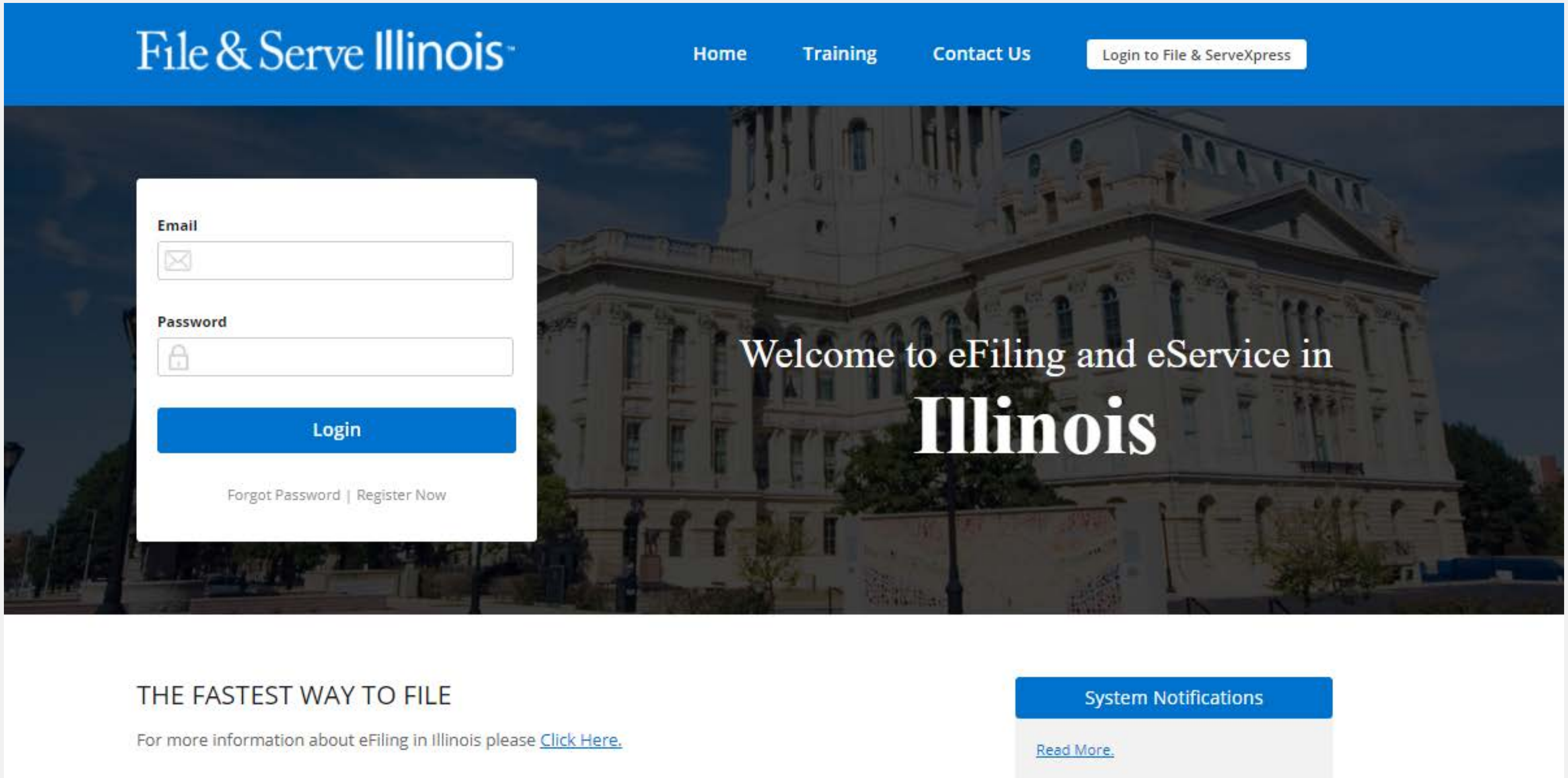
2. Enter your Username and Password and click **Login**.

3. **If you do not have a Username/Password, please contact your Firm Administrator.**

GETTING STARTED

File & Serve *Illinois*™

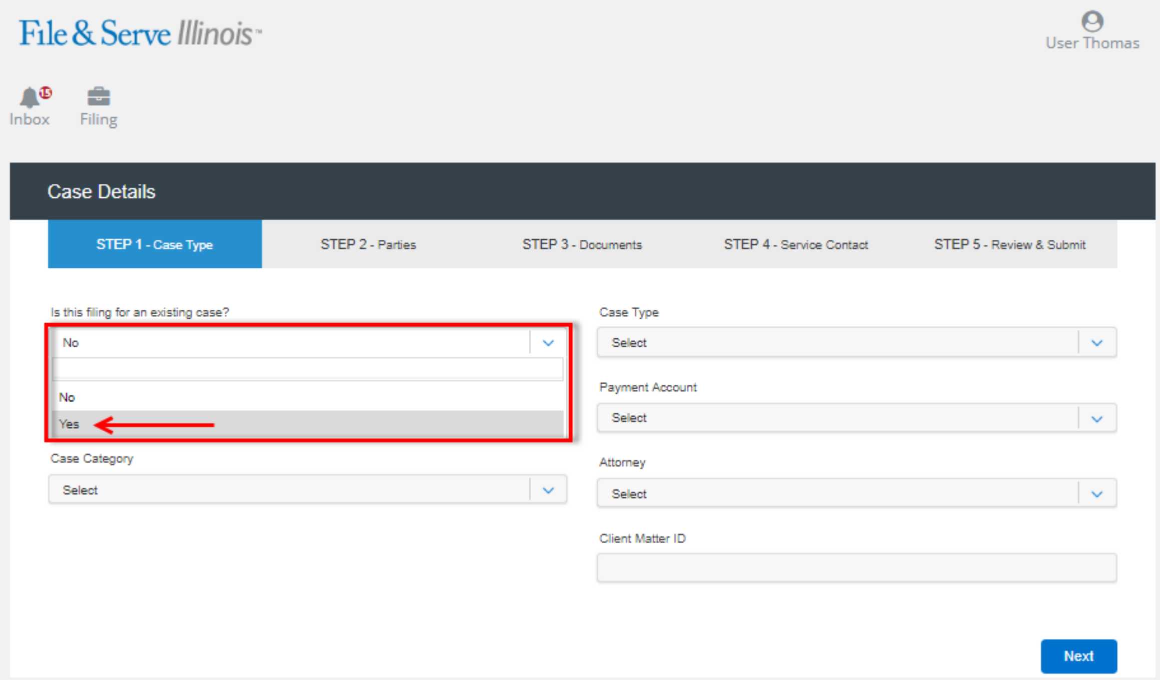
1. Access the File & Serve *Illinois* login page via www.fileandserveillinois.com
2. Enter your Username/Password and click "**Login**".



GETTING STARTED *(continued)*

3. Once you are logged into your account, you will be taken to Case Details page to begin your filing. The 5 steps to complete and submit a filing will be displayed. Or, you will be taken to the Incomplete Filings page if you have any unfinished filings to complete and submit.

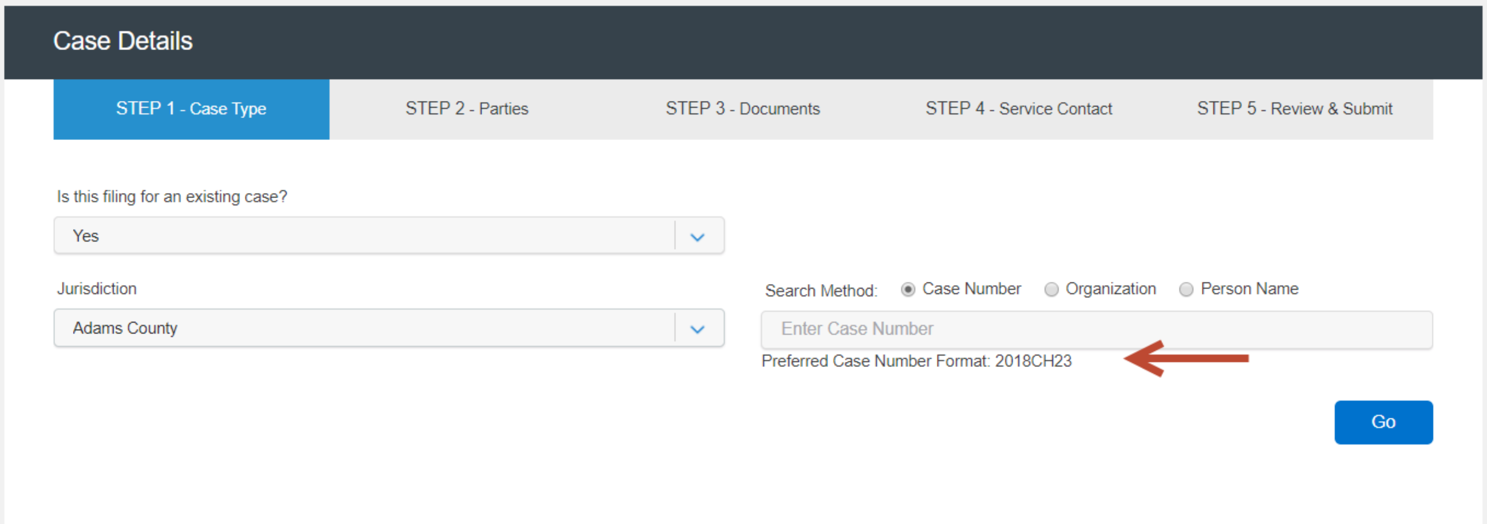
4. To begin the subsequent filing, you may stay on this page and go to the "**Is this filing for an existing case?**" field. Click on the drop-down menu and select "**Yes**." Or, go to the Completed Filings page and click on the "**+**" sign next to a transaction that has been accepted by the clerk. Please see next slides for screen shots.



GETTING STARTED *(continued)*

File & Serve Illinois™

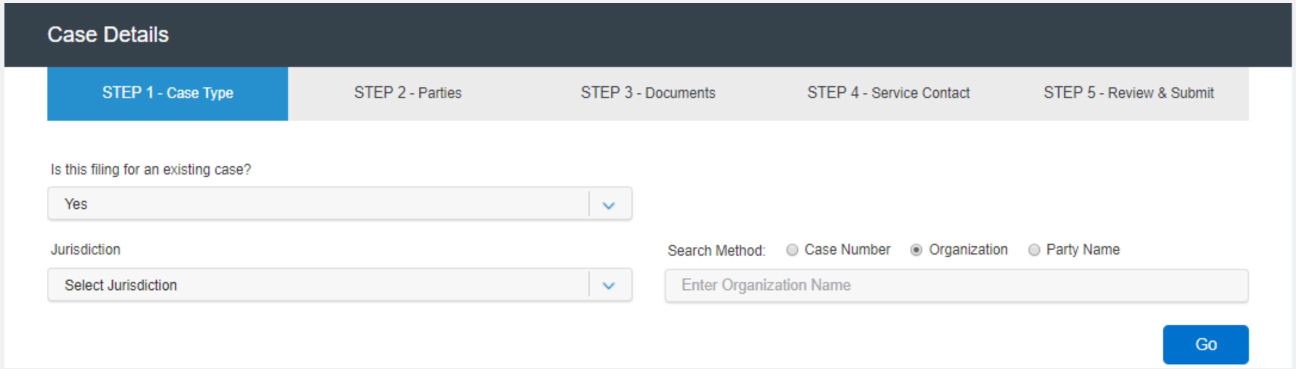
5. If you selected "**Yes**" in "**Is this filing for an existing case?**" field, you will be taken to a new screen to enter the jurisdiction and your case number, the Organization Name, or the Party Name to search for your case. Some jurisdictions will display a preferred case number format which will change based on the jurisdiction selected. Please see screen shot below and the next slide for additional screen shots for an Organization Name search, and a Party Name search.



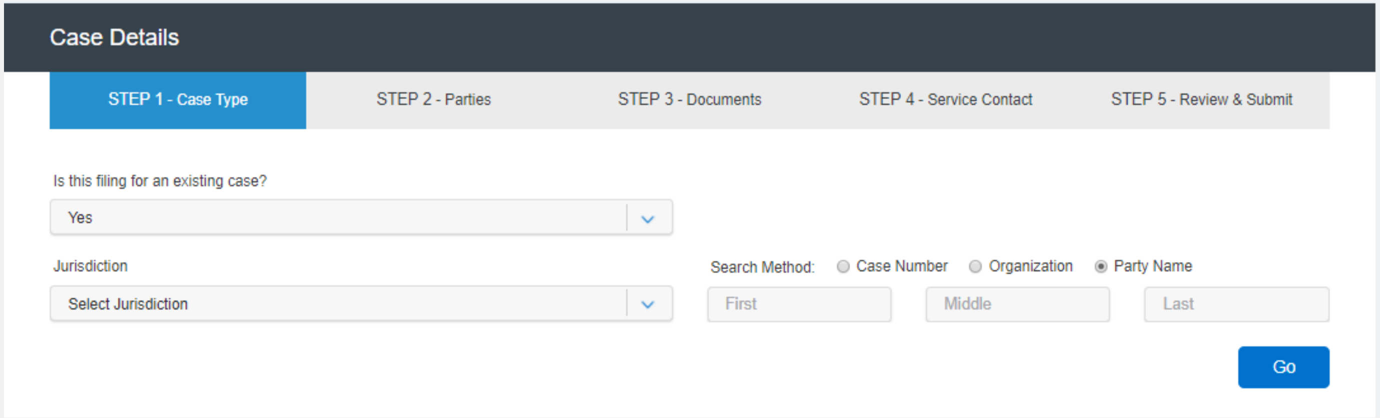
Case Number Search

GETTING STARTED *(continued)*

File & Serve Illinois™



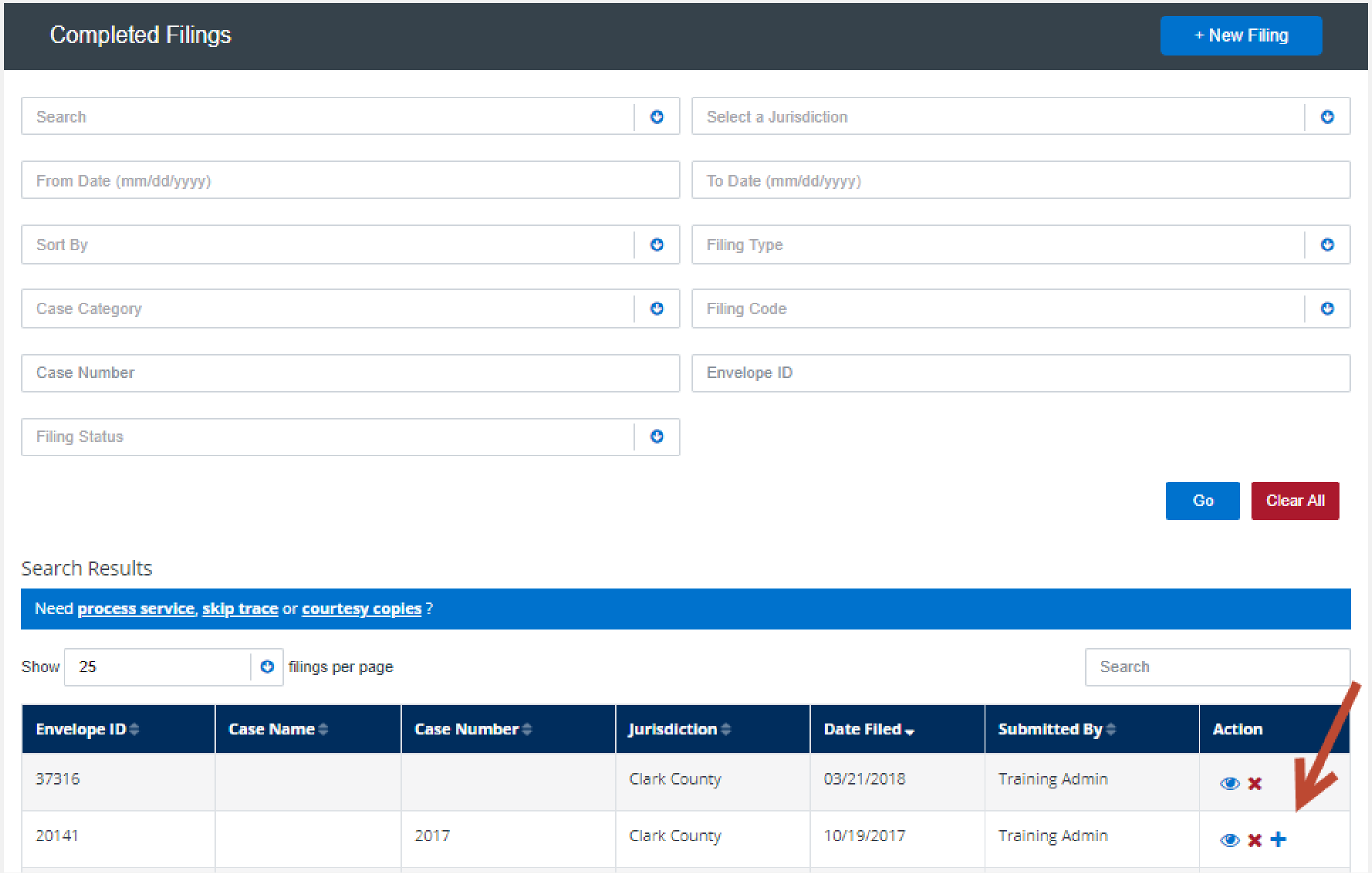
Organization Name Search



Party Name Search

GETTING STARTED *(continued)*

6. If you selected the "**+**" icon on the Completed Filings page next to a transaction that has been accepted by the clerk, you will be taken to a new screen.
7. Click "**Start Filing**" to begin your filing. Please see next slide for screen shot.



GETTING STARTED *(continued)*

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Search Result(s)

Select Case	Case Number	Case Type	Case Category	Case Name
Start Filing	2017	Small Claims - $ 2,500.01 thru $ 10,000.00	Small Claims	

Once your case appears, click on "Start Filing."

FILING INTO AN EXISTING CASE:
Step 1 – Case Type

File & Serve *Illinois*™

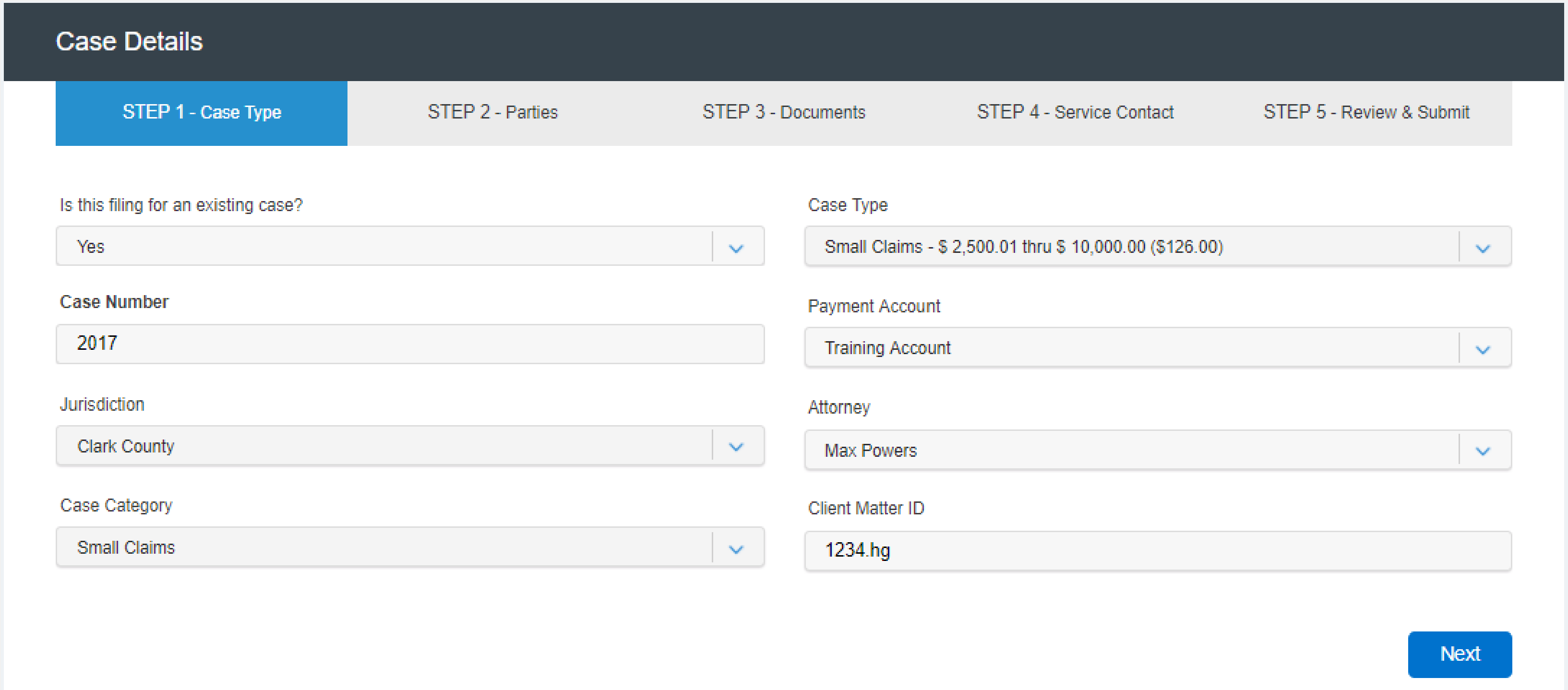
To file into an existing case using File & Serve *Illinois*, follow these steps:

1. All fields in Step-1 will be auto-populated. Verify the information. You will be able to change the information if necessary by clicking on the drop-down menu of the fields, or typing into the Client Matter ID field.

Note: The **Payment Account** field will be auto-populated to the default payment account chosen by your Firm Administrator. If you do not see that it is auto-populated, please contact your Firm Administrator. If you need to select Waiver, please click on the drop-down menu and make the selection. If you do not see a **Waiver** option, please contact your Firm Administrator. See screen shots on next slide.

FILING INTO AN EXISTING CASE:
Step 1 – Case Type *(continued)*

File & Serve Illinois™

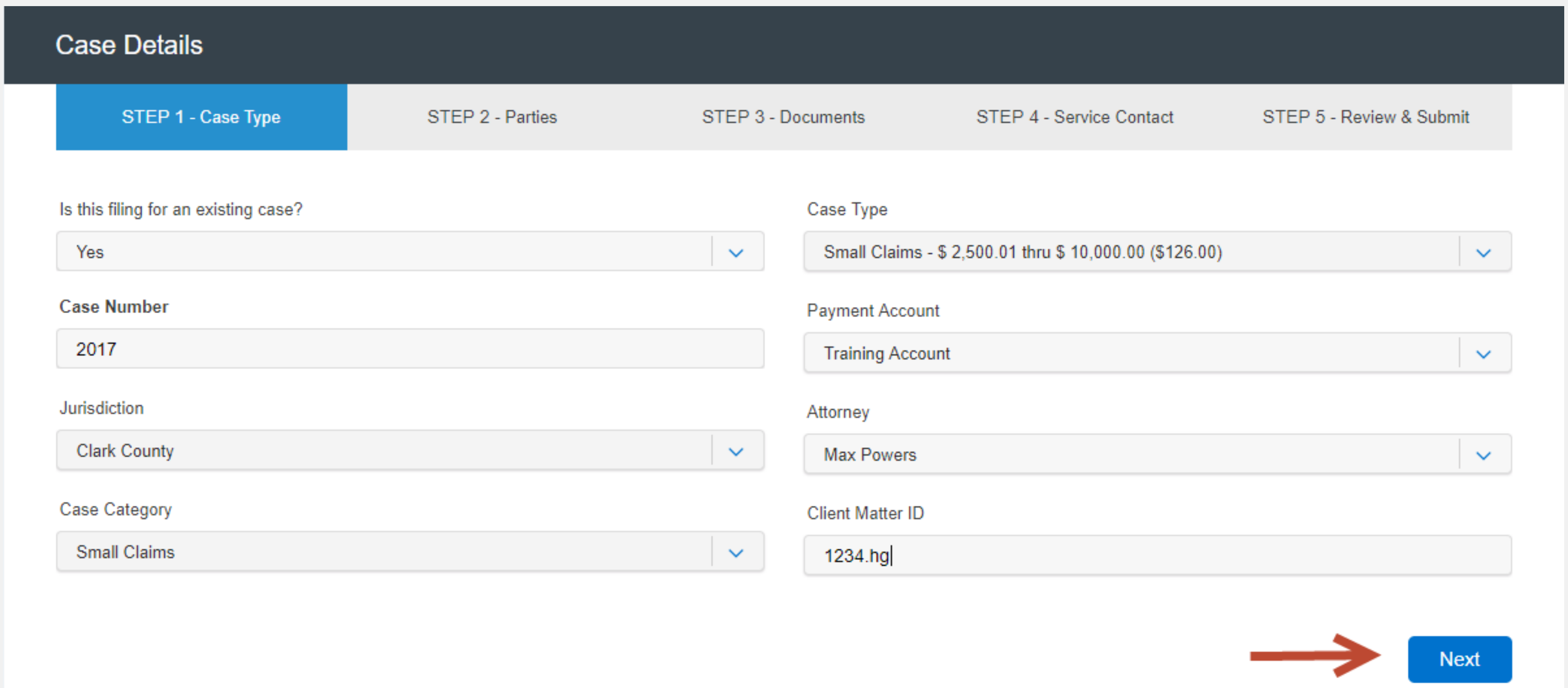


Click on the drop-down menu to find "Waiver", if needed.

FILING INTO AN EXISTING CASE:
Step 1 – Case Type *(continued)*

File & Serve *Illinois*™

2. Click "**Next**" to move to Step 2-Parties and gain the ability to toggle between Steps 2-5. The system will be auto-saving the information as you click "**Next**" or when you select a "**Step**". Please see next slide.



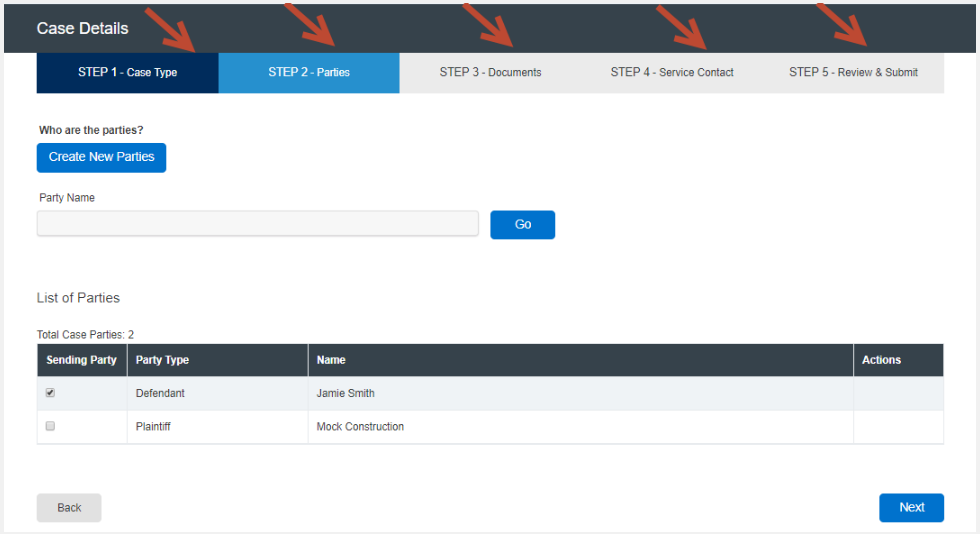
FILING INTO AN EXISTING CASE:
Step 1 – Case Type *(continued)*

File & Serve Illinois™

TOGGLING BETWEEN STEPS

3. Once you click **"Next"** on Step 1-Case Type, you will be allowed to toggle between Step 1, Step 2, Step 3, Step 4, or Step 5 in any order of your choice. **Example:** You have completed Step 1-Case Type and clicked "Next". You can now complete Step 2-Parties and view/enter parties; or, click Step 3-Documents and upload a document(s); or, click Step 4-Service Contact and view/enter service contacts. Your selection does not have to be in sequential order.

Note: *If you did not enter information in one of the Steps, there will be **error messages** in Step 5-Review & Submit prompting you to **complete** those Steps/sections. **The platform will not allow the transaction to be submitted if one of the Steps has not been completed**. Please see screen shot in the next slide.*



FILING A NEW CASE:
Step 1 – Case Type *(continued)*

File & Serve *Illinois*™

Case Details Almost done. Review Entries.

Printable Version

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

Case Type

Jurisdiction : Clark County	**Case Category :** Adoption
Case Type : Adoption	
Payment Account: Training Account	**Attorney :** Dean Roberts
Client Matter ID: abcd-123.456	

Parties 0

Sending Party	Party Type	Name	Address

Error:
- At least one party needed to continue.

Documents

Filing Code	Filing Description	Original Document	Converted Document	Optional Services	Document Category	Document Description	Fees

Responsible for Filing Fees :

Send Accepted Notifications To:

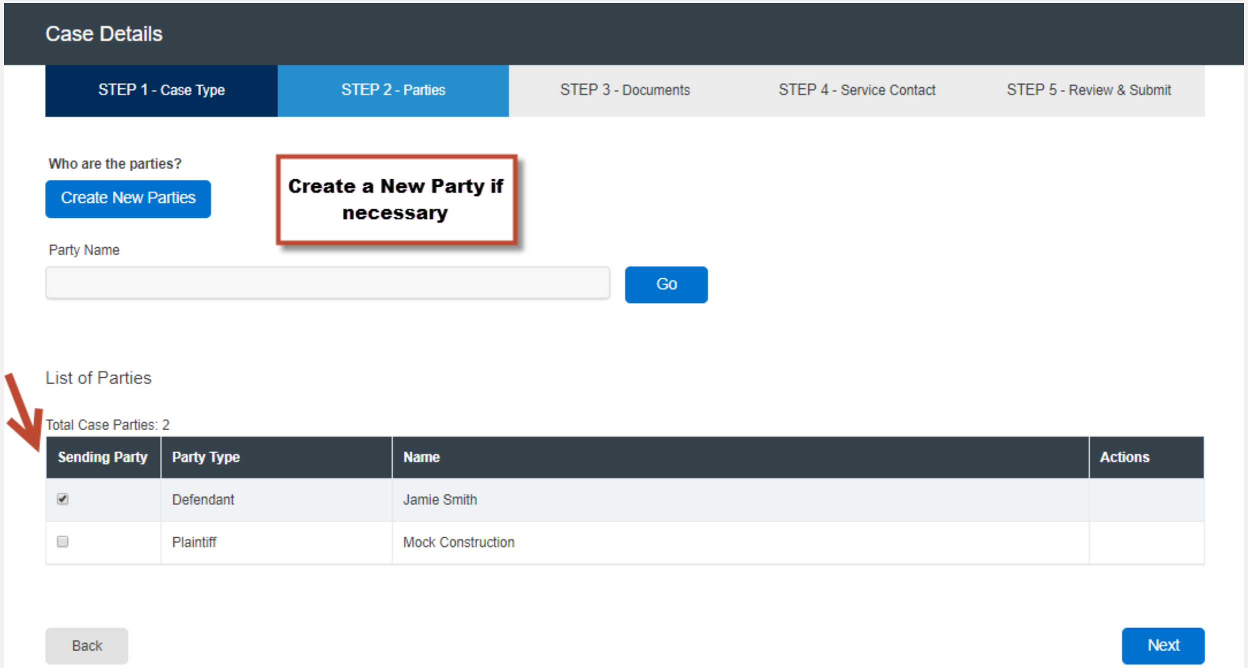
Error:
- Please add document to continue.
- Select Party Responsible for Filing Fees

FILING INTO AN EXISTING CASE:
Step 2 – Parties

File & Serve *Illinois*™

To verify and/or create a new party in an existing case using File & Serve *Illinois*, follow these steps:

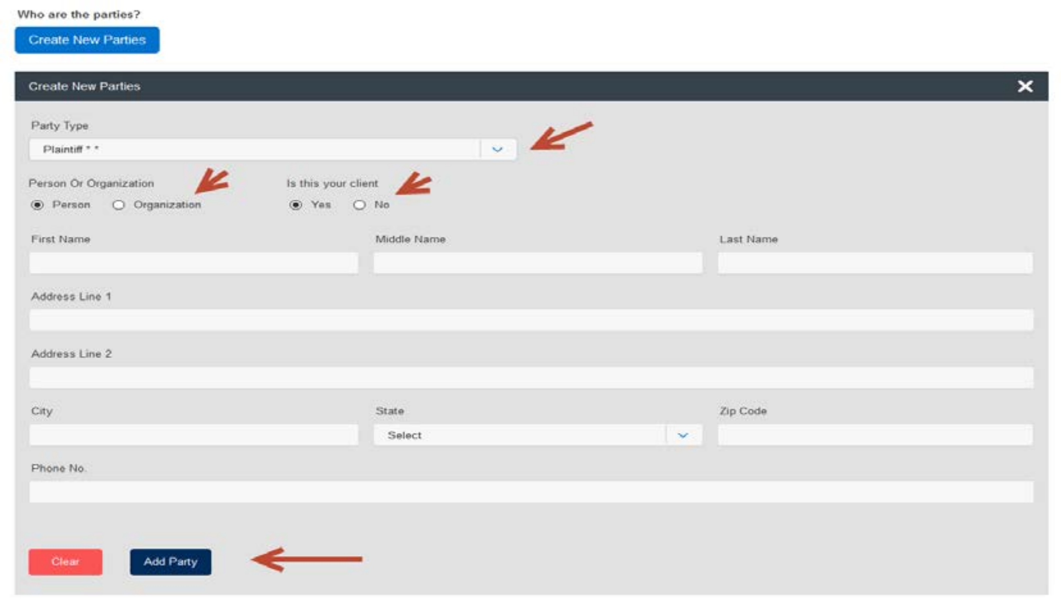
1. The List of Parties (Party Type/Name) will be auto-populated, including the "**Total Case Parties**."
2. Select the Sending Party for this transaction by checking the appropriate box if it is not already populated.
3. If necessary, create a new party by selecting, "**Create New Parties**."



FILING INTO AN EXISTING CASE:
Step 2 – Parties *(continued)*

File & Serve Illinois™

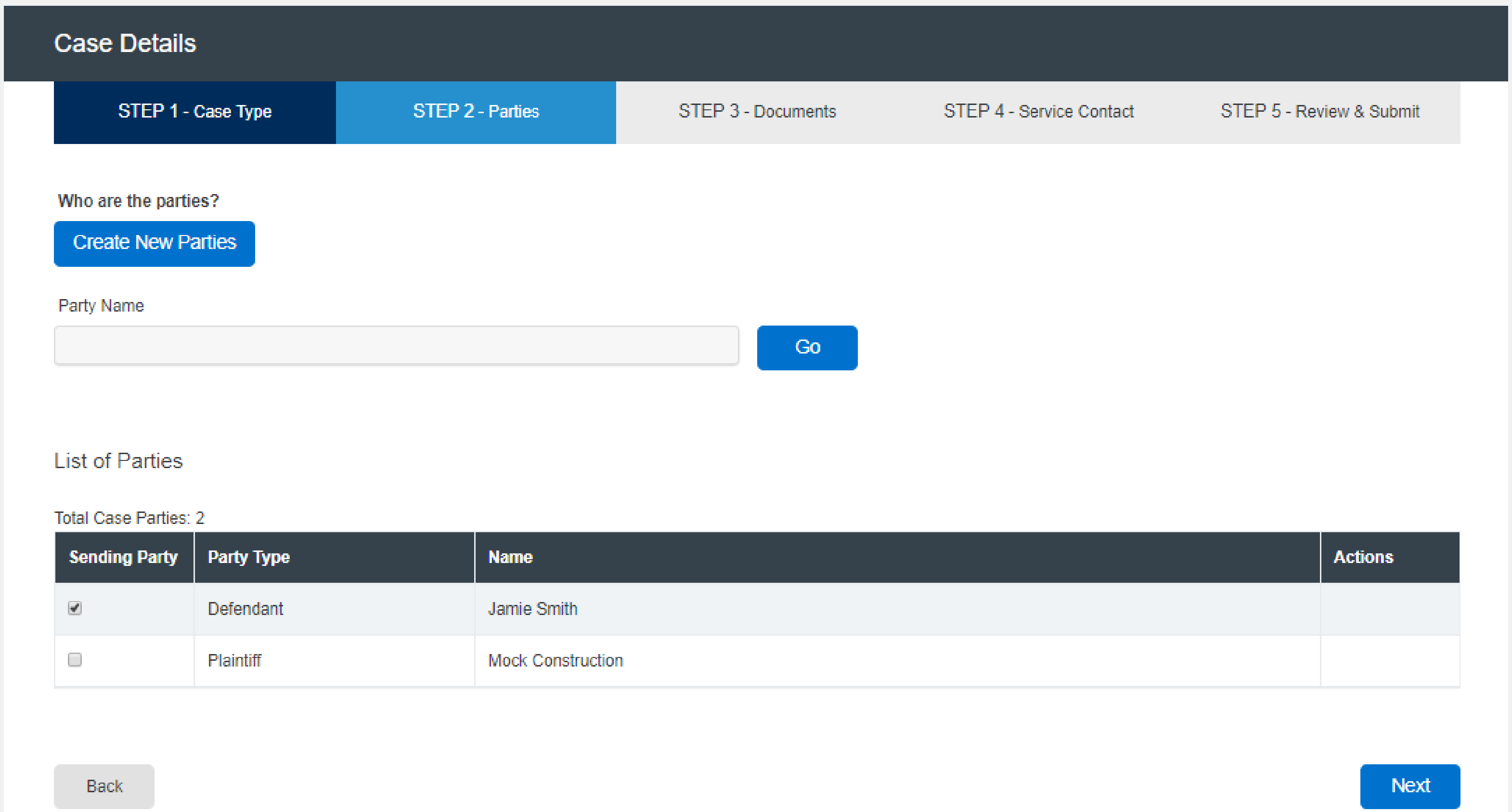
4. If you select, "**Create New Parties**," a new screen will pop-up.
5. Select "**Party Type**" from the drop-down menu. ***Note:*** *A Party Types with an "*" is required.*
6. Select the radio button if the party is a "**Person**" or an "**Organization**."
7. Select the radio button whether the party is your client or not by selecting "**Yes**" or "**No**".
8. Enter the party's First Name, Last Name. **Note:** Only the party name is mandatory. You can add information into the Address and Phone No. fields at your discretion.
9. Click "**Add Party**" to add the party to the List of Parties.
10. Walk through these steps for all remaining parties that need to be added until complete.



FILING INTO AN EXISTING CASE:
Step 2 – Parties *(continued)*

File & Serve Illinois™

11. Your List of Parties will be displayed at the bottom of the screen, including the "**Total Case Parties**".
12. Make sure a Sending Party is selected for this transaction by checking the appropriate box.
13. Click "**Next**" to move to Step 3-Documents or on the tab, "**Step 3-Documents.**"

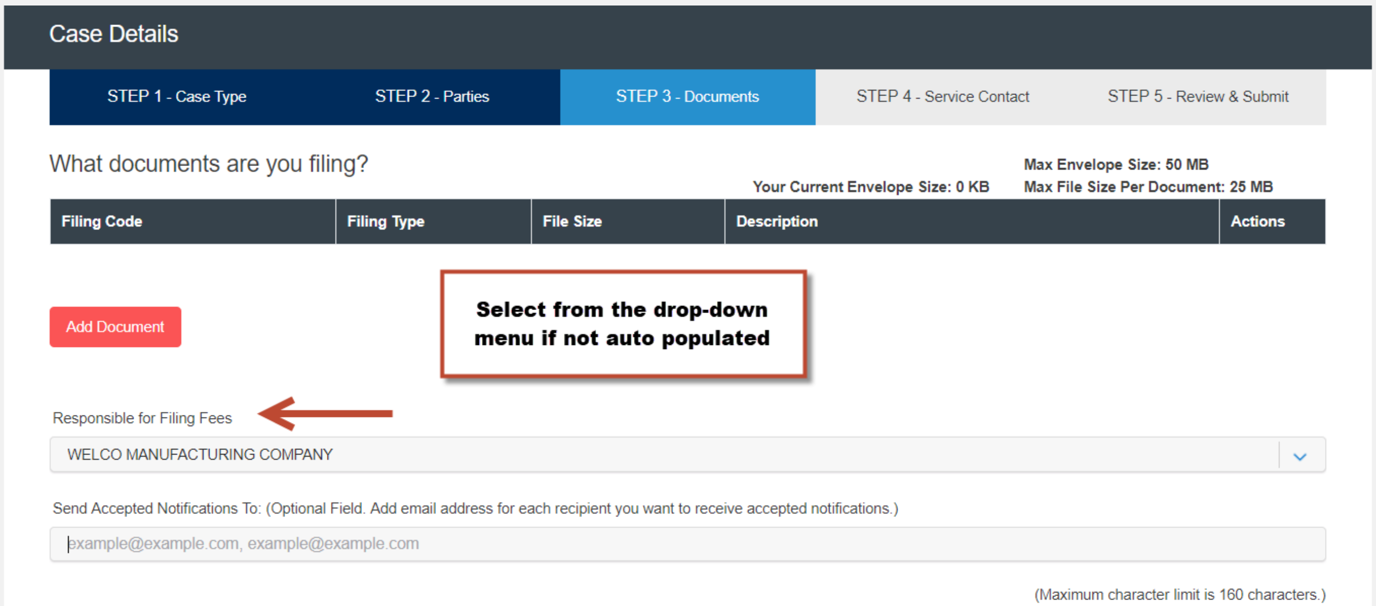


FILING INTO AN EXISTING CASE:
Step 3 – Documents

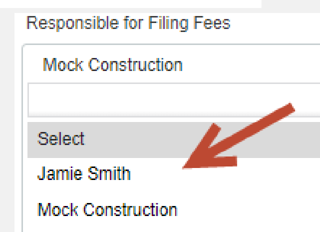
File & Serve *Illinois*™

To upload and attach documents to be filed in the existing case using File & Serve *Illinois*, follow these steps:

1. Enter the party **Responsible for Filing Fees** for this transaction by clicking on the drop-down menu if it is not already populated.



Note: Select the party responsible for the filing fees for this transaction by selecting/highlighting the party.

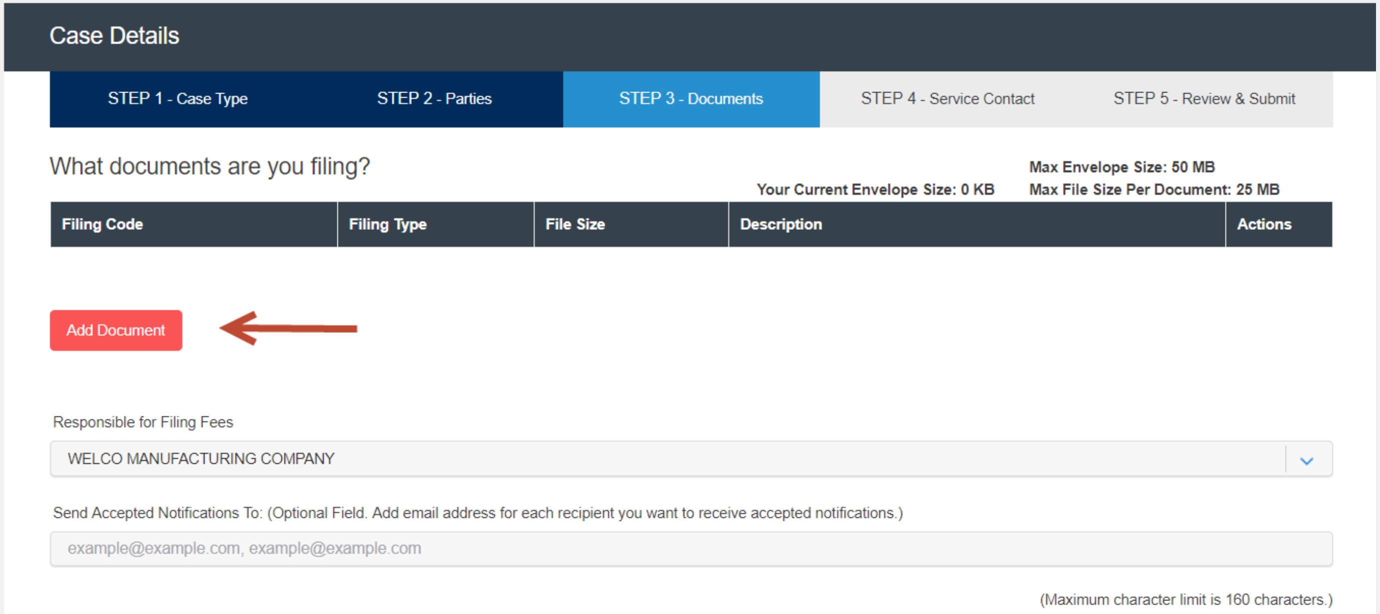


FILING INTO AN EXISTING CASE:
Step 3 – Documents *(continued)*

File & Serve Illinois™

2. Click on "**Add Document**" to open up a new screen to begin uploading your documents.

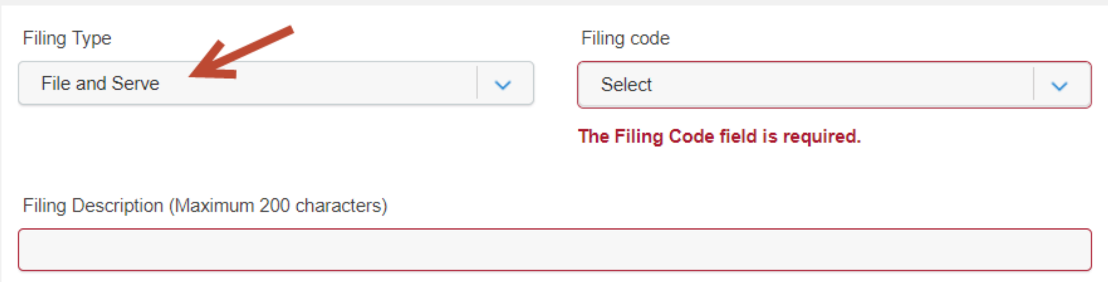
   Note: Only the Lead Document will be displayed, including the Filing Code, Filing Type, and (Filing) Description. You can edit the Lead Document and its Attachment by clicking on the "pencil" icon under the Action column. Or, you can click on the "trash can" icon to remove and start again.



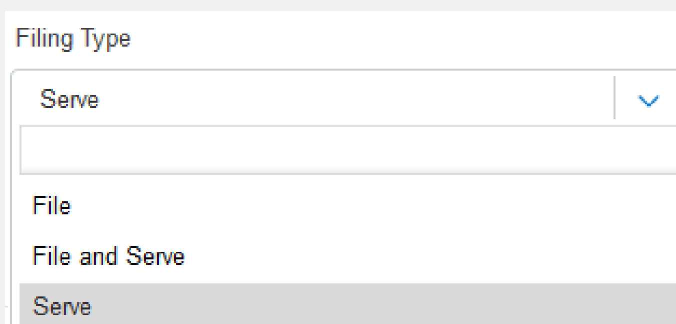
FILING INTO AN EXISTING CASE:
Step 3 – Documents *(continued)*

3. Filing Type: Defaulted to “**File and Serve**.” If you’d like a “**File**” only transaction, click on the drop-down menu and select “**File**.” If you’d like a “**Serve**”-only transaction, click on the drop-down menu and select “**Serve**”.

File & Serve Transaction (Default)



File Only Transaction

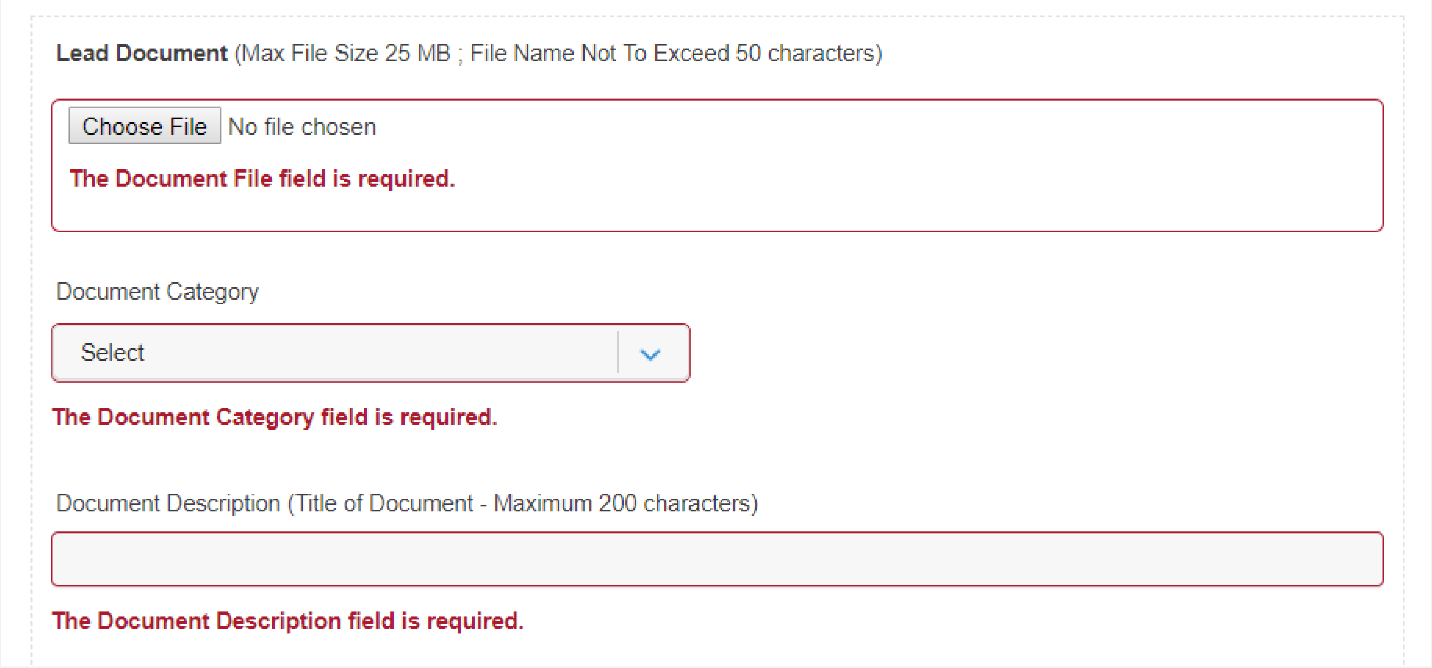


Serve Only Transaction

FILING INTO AN EXISTING CASE:
Step 3 – Documents *(continued)*

File & Serve Illinois™

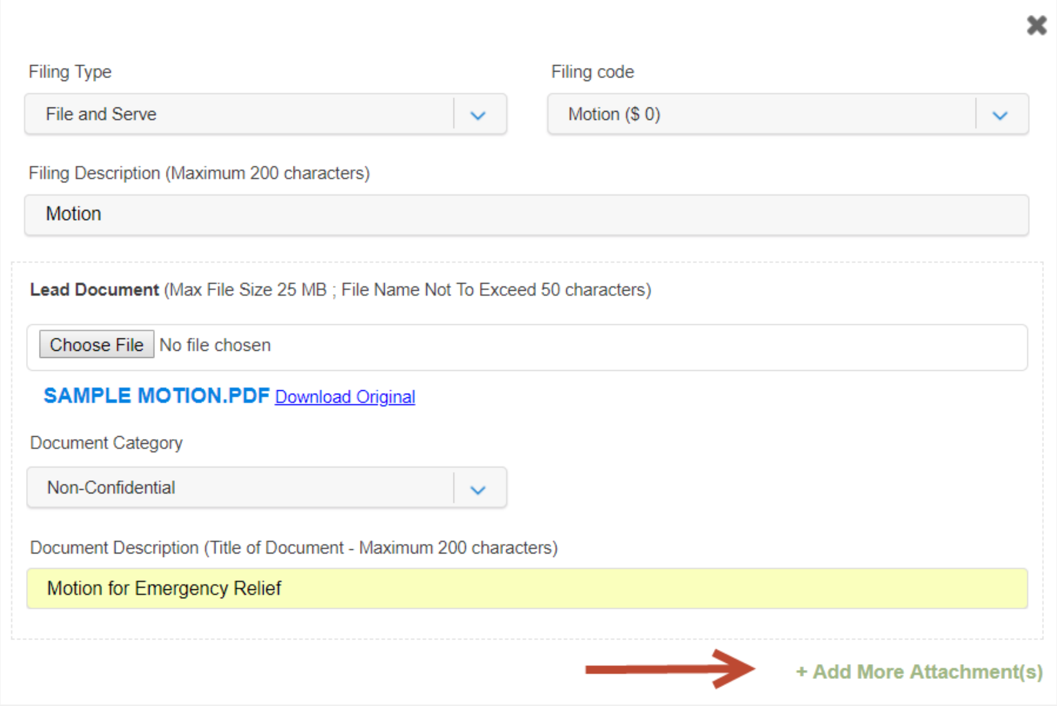
4. Select the Filing Code.
5. Enter the Filing Description. This is the set of documents you are eFiling/eServing in this envelope. Note the character limit of 200.
6. Click on "**Browse**" or "**Choose File**" to upload the Lead Document. Note the character limit for the file name is 50 characters. This includes, e.g., ".pdf".
7. Select the Document Category.
8. Note the document size limit of 25MB; Envelope size is 50MB



FILING INTO AN EXISTING CASE:
Step 3 – Documents *(continued)*

File & Serve Illinois™

9. Enter the Document Description. Note the character limit of 200.
10. If your Lead Document has an attachment(s), select "**+Add More Attachment(s)**" to upload.*

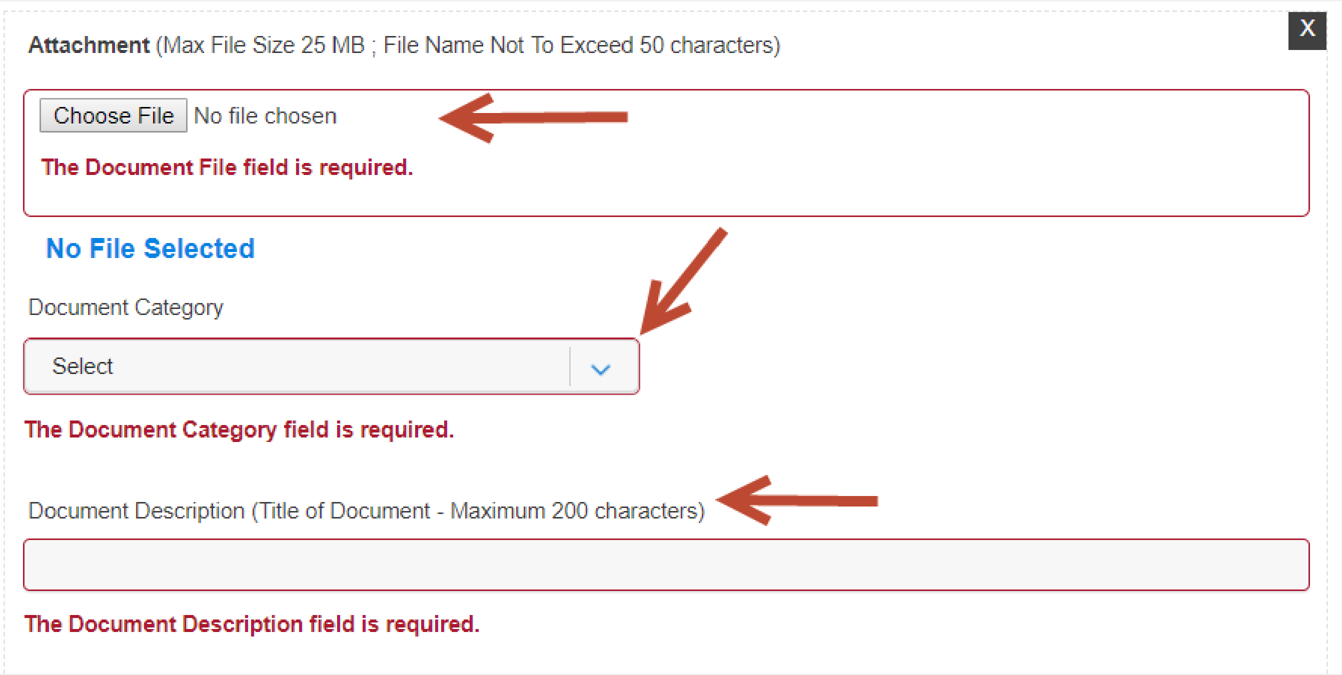


*Please check the local rules for document guidelines and specifications.

FILING INTO AN EXISTING CASE:
Step 3 – Documents *(continued)*

File & Serve Illinois™

11. Click, "**Browse**" or "**Choose File**" to upload the attachment.
12. Make sure to select the Document Category.
13. Enter the Document Description. Note the character limit of 200.



FILING INTO AN EXISTING CASE:
Step 3 – Documents *(continued)*

File & Serve Illinois™

14. Some jurisdictions will offer "**Optional Services**." If available, check the appropriate box(es) and enter the number of desired copies. Example: If you are filing a Jury Demand or Appearance, select optional service to apply fee.

Optional Services

	Copies	Court Service	Unit Cost	Total Fee
☐		(Misc.) - Jury Demand - 12 Person	212.50	0.00
☑	1	(Misc.) - Jury Demand - 6 Person	106.25	106.25

15. Next, enter a Note to Clerk. This is your "**direct**" communication with the court clerk.
16. Click "**Save**" to attach the Lead Document and Attachment to the envelope.

Note to Clerk (Optional - Maximum 200 characters)

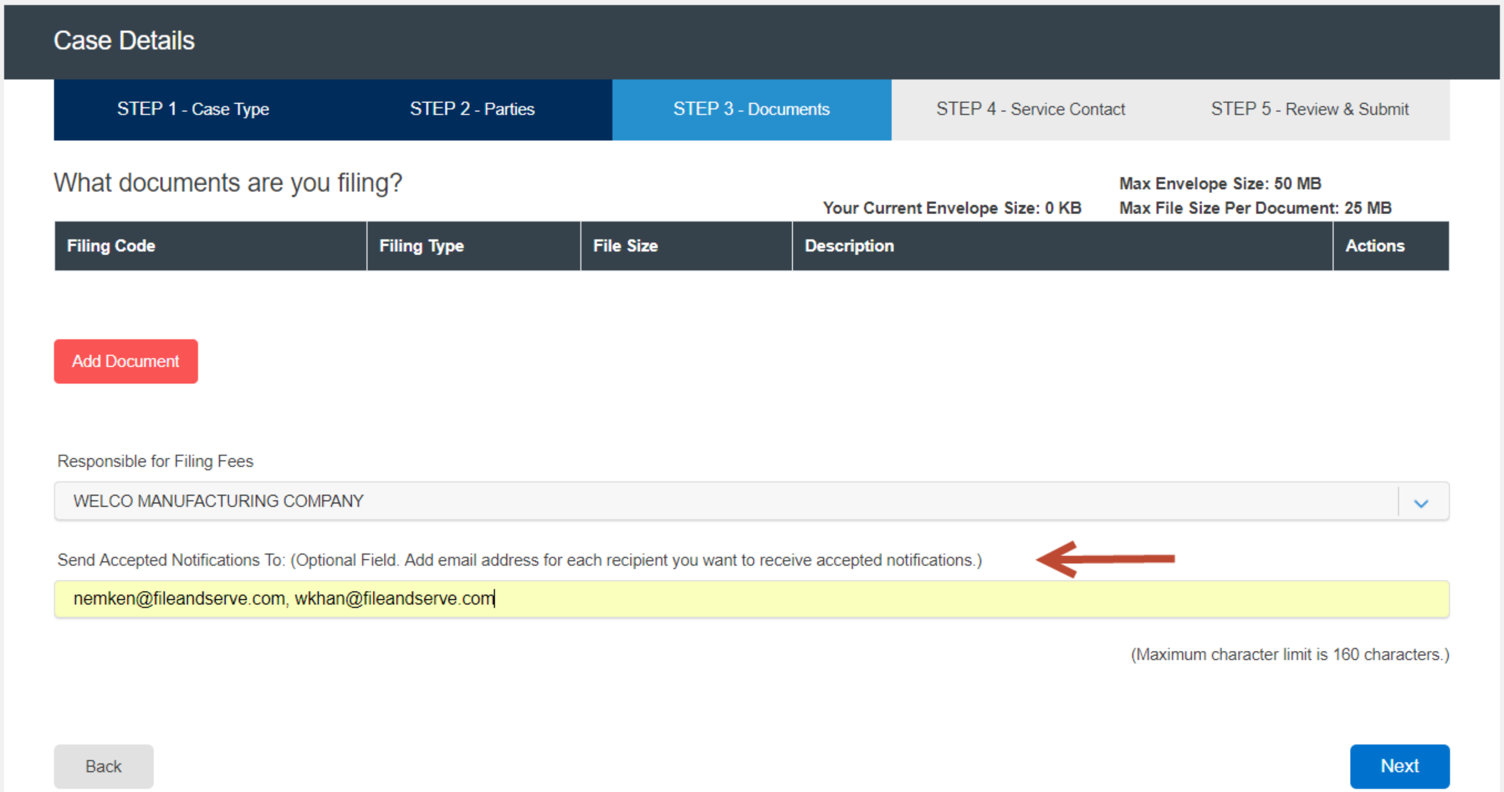
Your direct communication with the clerk.

Clear Save

FILING INTO AN EXISTING CASE:
Step 3 – Documents *(continued)*

File & Serve Illinois™

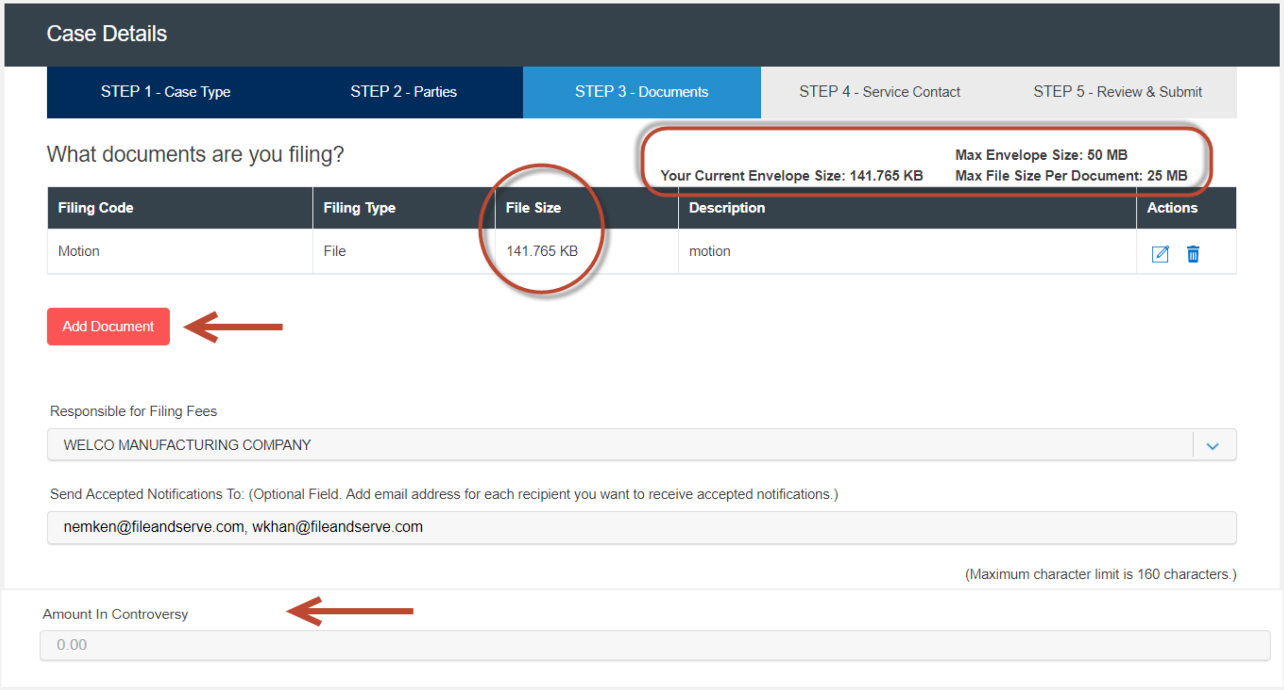
17. The filer has the option to enter an email address(es) of their legal team member(s) to ensure a "Courtesy Notification" is delivered to them. **Note**: All notifications come from the eFiling manager, eFile Illinois. The filer will receive all notifications: Submitted, Accepted, Returned for Correction, and/or Rejected.



FILING A NEW CASE:
Step 3 – Documents *(continued)*

18. You can begin to upload additional Lead Documents and Attachments, if necessary. Simply click on “**Add Document**” and follow the same steps.

Note: You can view the Maximum File Size Per Document, Current Envelope Size and File Size per lead document as shown below.



When the filer selects a Filing Code which requires an Amount in Controversy, a new field for that amount will be displayed.

FILING INTO AN EXISTING CASE:
Step 4 – Service Contacts

File & Serve *Illinois*™

The next few slides will explain how to add a service contact(s) to an existing service list. Please note the following in all of the selections in an existing case using File & Serve *Illinois*, follow these steps:

- The service list will be auto-populated.
- You will be able to view the number of contacts on the service list next to the "**eServe**" column.
- You can keep the boxes checked under "**eServe**" for those contacts you would like to serve in this transaction.
- You can de-select the boxes under "**eServe**" for those contacts you would like to NOT serve in this transaction.
- Click on the drop-down menu under the **Party** column to select either the case or a case party.* The system will automatically "attach" them and save the selection. You must complete this step in order for the contact to "stick" to the service list.

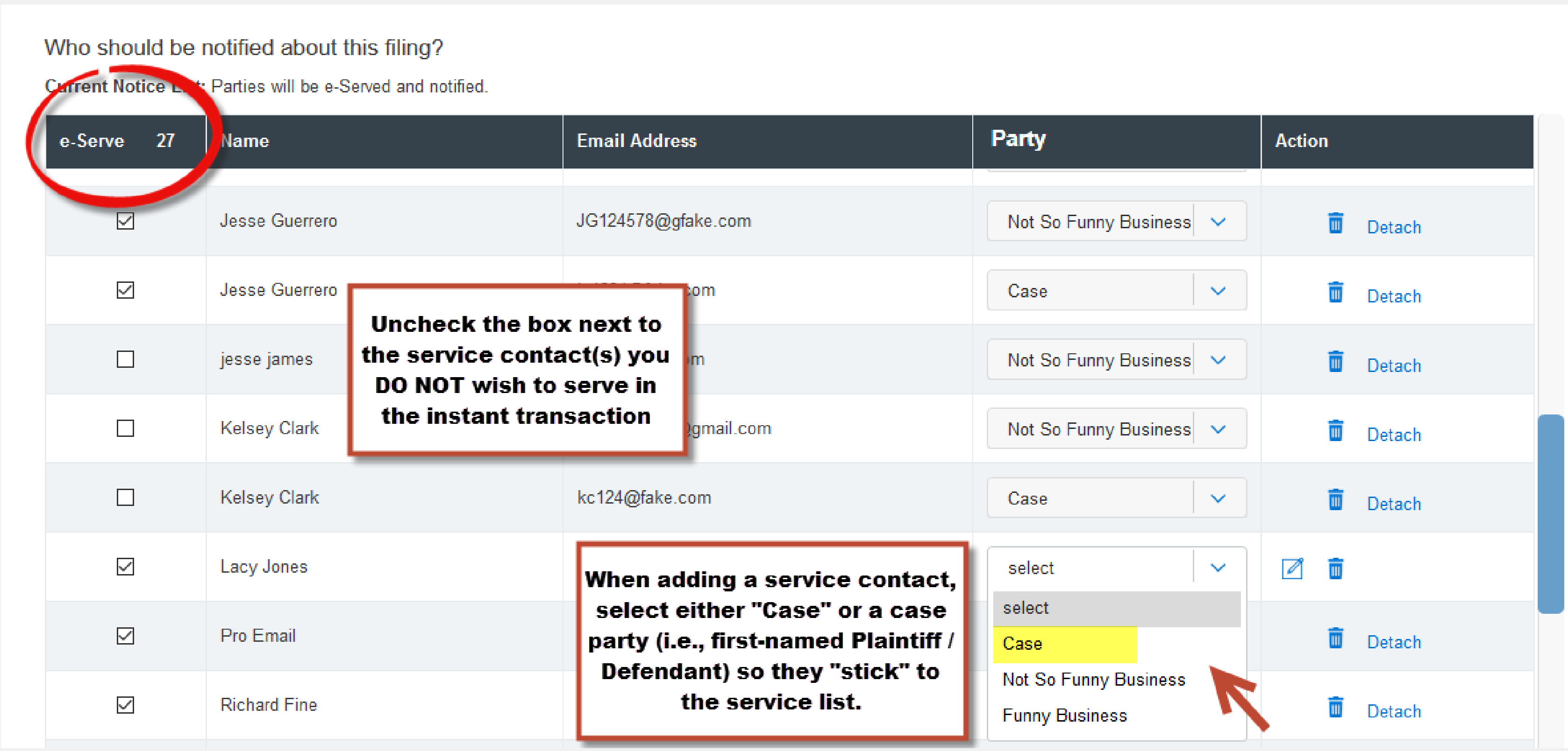
(See next slide for screen shot)

FILING INTO AN EXISTING CASE:

Step 4 – Service Contacts *(continued)*

*Select the "Case" if you'd like the Service Contact to be associated to the case.

*Select one of the case parties if you'd like the Service Contact to associate/"follow" the party.

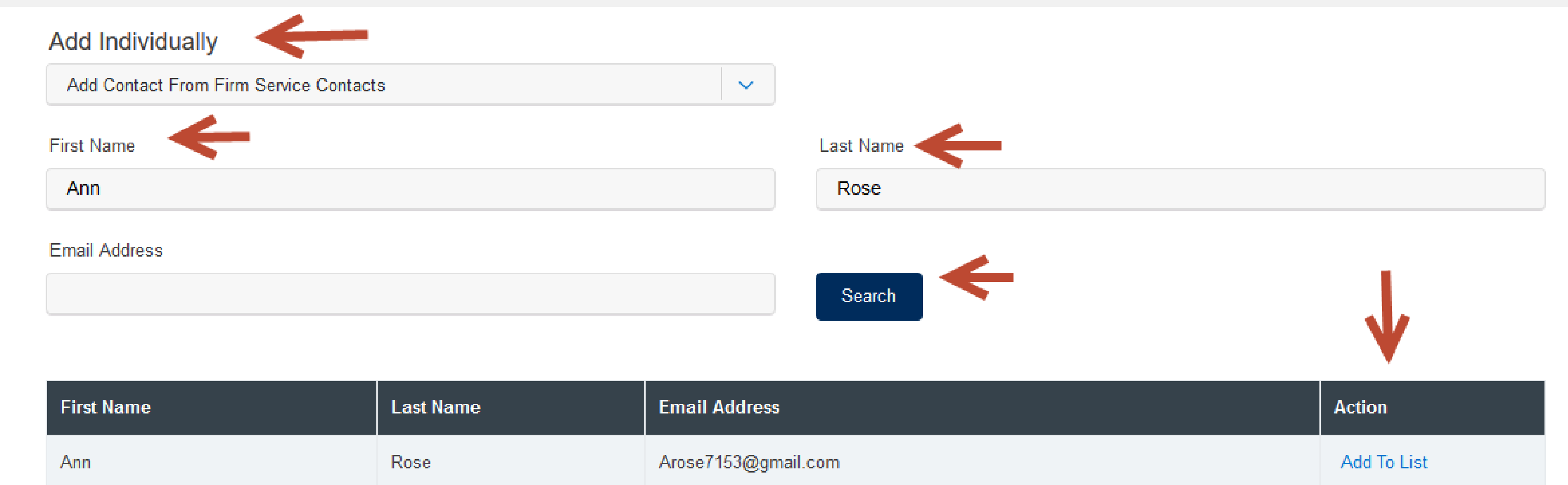


FILING INTO AN EXISTING CASE:
Step 4 – Service Contacts *(continued)*

File & Serve *Illinois*™

To create service contacts in an existing case using File & Serve *Illinois*, follow these steps:

1. Select Firm Service Contacts from the drop-down menu under “**Add Individually**.”
2. Enter the first and last name of the support staff member(s) in your firm.
3. Select “**Search**,” and “**Add to List**.”

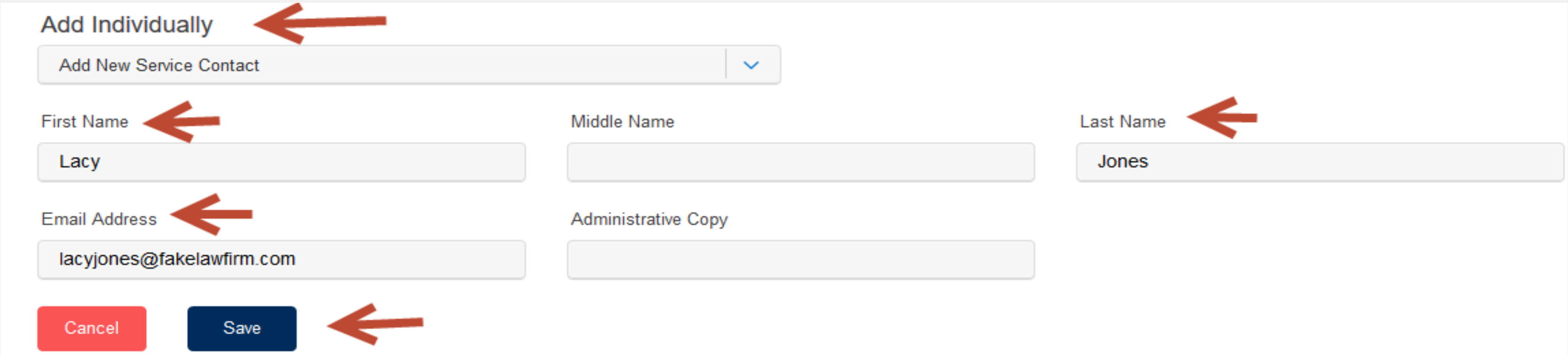


FILING INTO AN EXISTING CASE:
Step 4 – Service Contacts *(continued)*

File & Serve *Illinois*™

4. To add a New Service Contact, select "**Add New Service Contact**" from the drop-down menu under "**Add Individually**."

5. Enter their first name, last name, and email address. Click "**Save**."



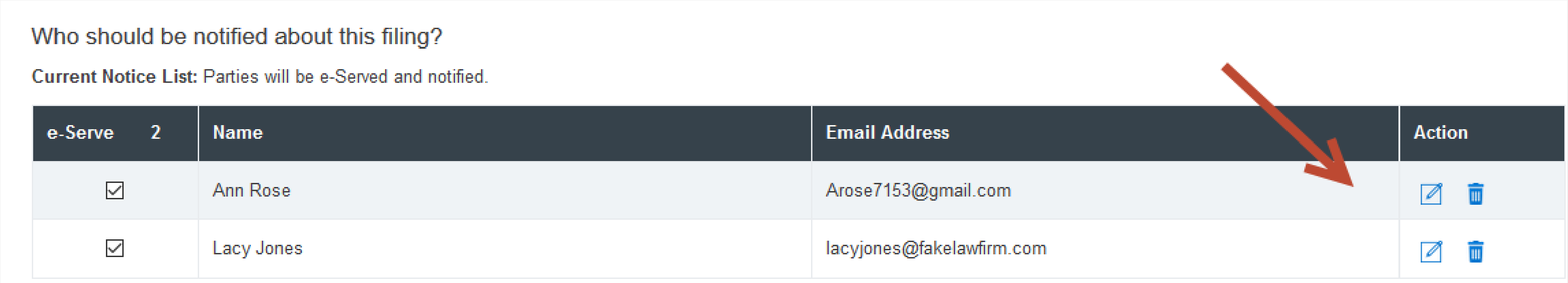
FILING INTO AN EXISTING CASE:
Step 4 – Service Contacts *(continued)*

6. New Service Contacts will be saved to the service list and to “**Service Contacts**” under your firm.

7. You can then easily search for them under “**Add Firm Service Contacts**” for any future cases.

8. The Firm Administrator can access Firm Service Contacts under “**Service Contacts**” in the Firm Admin drop-down menu to edit, remove, or add any Firm Service Contacts. Filers can access Firm Service Contacts under “Service Contacts” under the “**Filing**” drop-down menu to edit, remove, or add any Firm Service Contacts.

9. You can edit or remove a service contact during the filing by selecting the “pencil” icon or the “trash can” icon under the Action column.


Who should be notified about this filing?

Current Notice List: Parties will be e-Served and notified.

e-Serve 2	Name	Email Address	Action
☑	Ann Rose	Arose7153@gmail.com	
☑	Lacy Jones	lacyjones@fakelawfirm.com	

10. Click “**Next**” to move to Step 5-Review & Submit or on the tab, “**Step 5-Review & Submit**”.

FILING INTO AN EXISTING CASE:
Step 5 – Review & Submit

File & Serve *Illinois*™

To review the envelope details prior to submitting to the court using File & Serve *Illinois*, follow these steps:

1. Using your scroll bar, review each section.

2. If you find a mistake in a section, click on the "pencil" icon to edit that section.

3. The Document section will display the Lead Document(s), its Attachment(s), the original format(s), converted format(s) (if applicable), the "Accepted Notifications", and any Filing Code fees.

Case Details Almost done. Review Entries.

Printable Version

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

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	

Parties 2

Sending Party	Party Type	Name	Address
✔	Plaintiff/Petitioner	John Smith	
	Defendant/Respondent	James Company	

Documents

Filing Code	Filing Description	Original Document	Converted Document	Optional Services	Document Category	Document Description	Fees
Petition (Lead Document) **Note to Clerk:** Thank you!	Petition Declaration in Support	SAMPLE PETITON.docx	SAMPLE PETITON.pdf	(Misc.) - Certified Mailing Fee(1 * $16.49)	Non-Confidential	Petition for John Doe v. Corp	$16.49

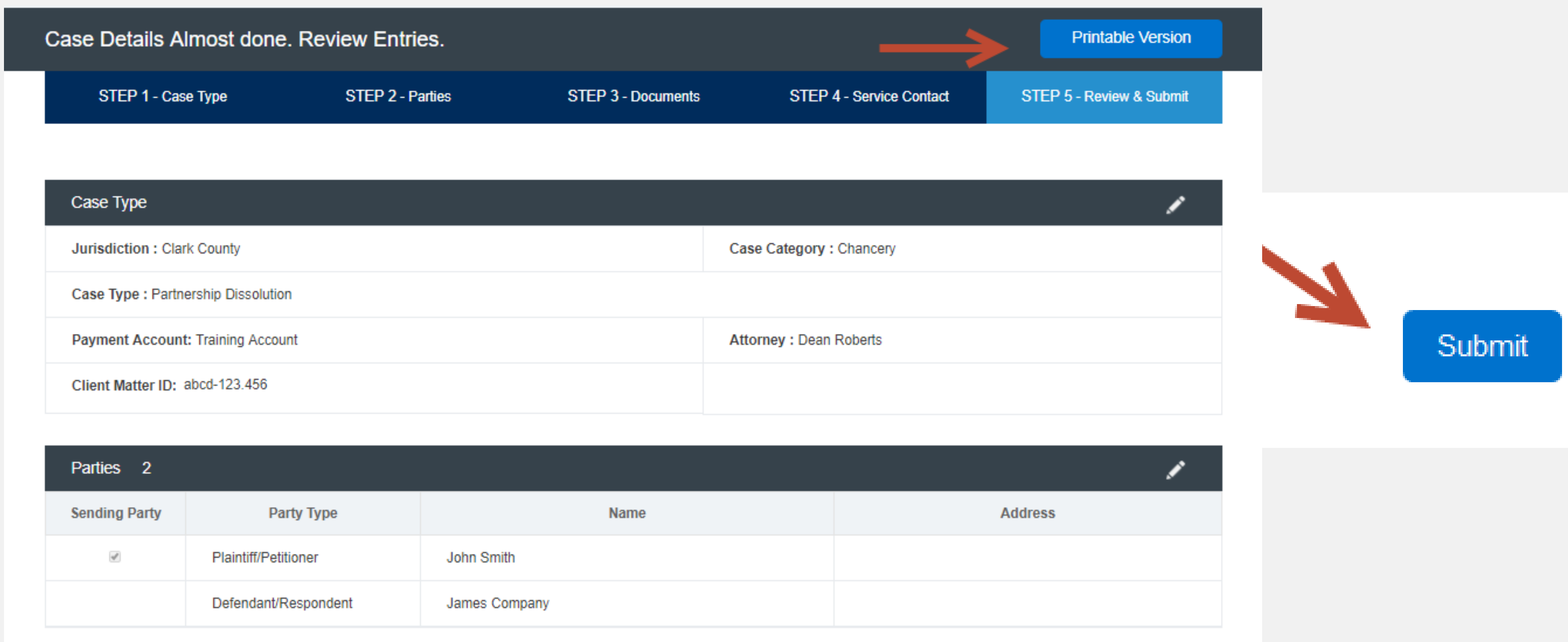
Responsible for Filing Fees : John Doe

Send Courtesy Notification To: nemken@fileandserve.com, wkahn@fileandserve.com

FILING INTO AN EXISTING CASE:
Step 5 – Review & Submit *(continued)*

File & Serve Illinois™

4. Make sure the correct party is listed next to the "**Responsible for Filing Fees**" section.
5. The Service Contact section will display, "**Yes**" for contacts to be served with this envelope.
6. All fees associated with the transaction will be listed for your review.
7. You can print the envelope details by selecting "**Printable Version**."
8. You must select "**Submit**" for immediate filing to the court and service on the selected contacts.



FILING INTO AN EXISTING CASE:
Step 5 – Review & Submit *(continued)*

9. After you click "**Submit**," you will receive the following message with your envelope ID. Please refer to the next slide for more information on the "process service, skip trace or courtesy copy" noted in the envelope ID message.