File & Serve Texas™

Service Contacts

File & Serve *Texas*

SERVICE CONTACTS USER GUIDE

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FILE & SERVE *TEXAS* RESOURCES

File & Serve *Texas* has many resources available to you in order to address your questions and concerns:

- **File & Serve *Texas* 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 *Texas* 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://www.fileandservexpress.com/texas/trainingresources.html for more information.

FILING A NEW CASE: Adding Service Contacts

Step 4 – *Service Contacts*

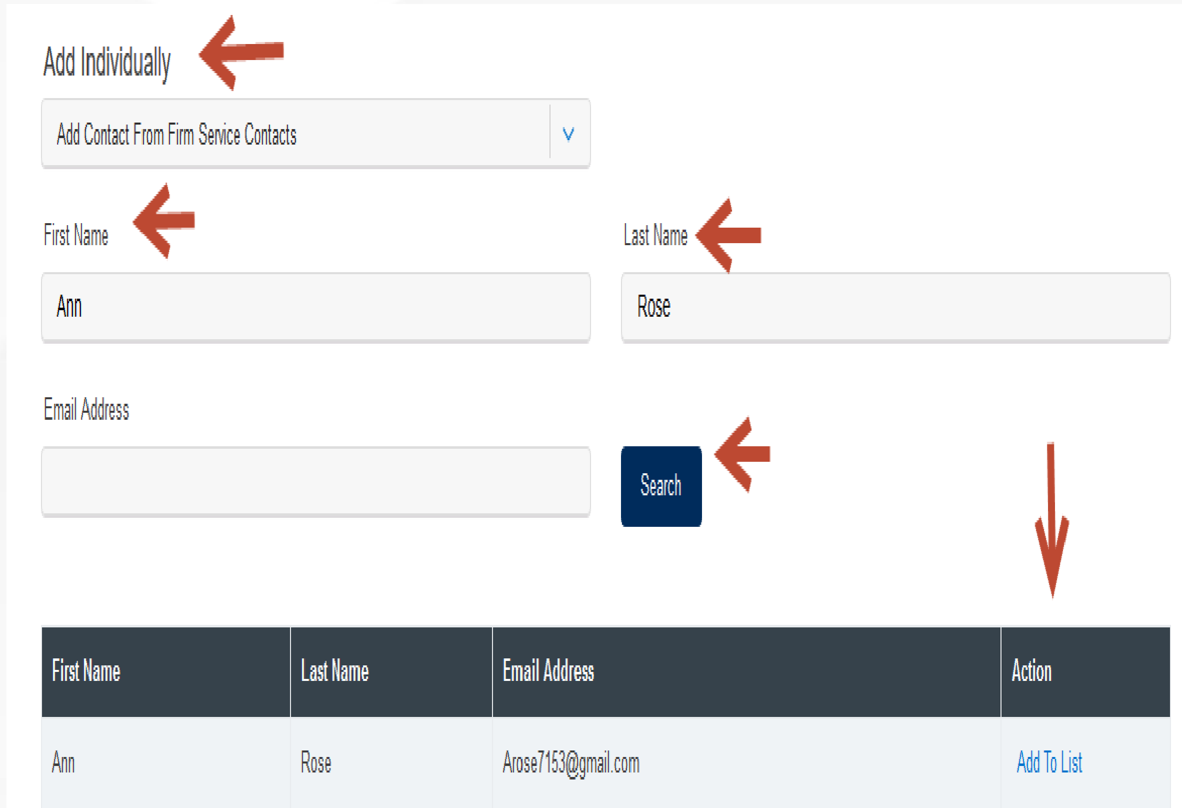
To create service contacts in a new case using File & Serve *Texas*, follow these steps:

Adding a Firm Service Contact:

1. To add a support staff member(s) from your firm, select "**Add Contact from 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**."



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FILING A NEW CASE: Adding Service Contacts

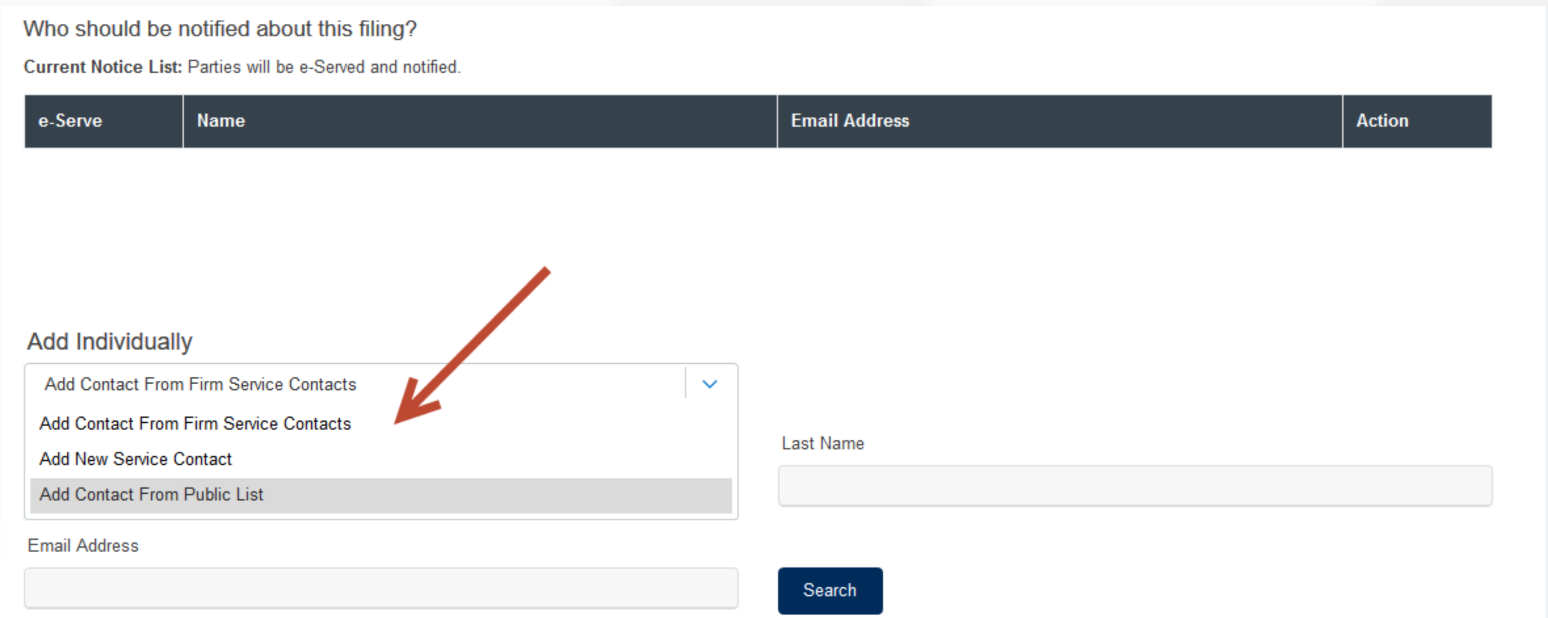
Step 4 – *Service Contacts (continued)*

Adding a Contact from the Public List:

4. To add an attorney in the state of Texas, including the attorney(s) within your firm, select “**Add Contact From Public List**” from the drop-down menu under “**Add Individually**.” This is managed by the State Bar of Texas.

5. Enter the first and last name of the attorney(s).

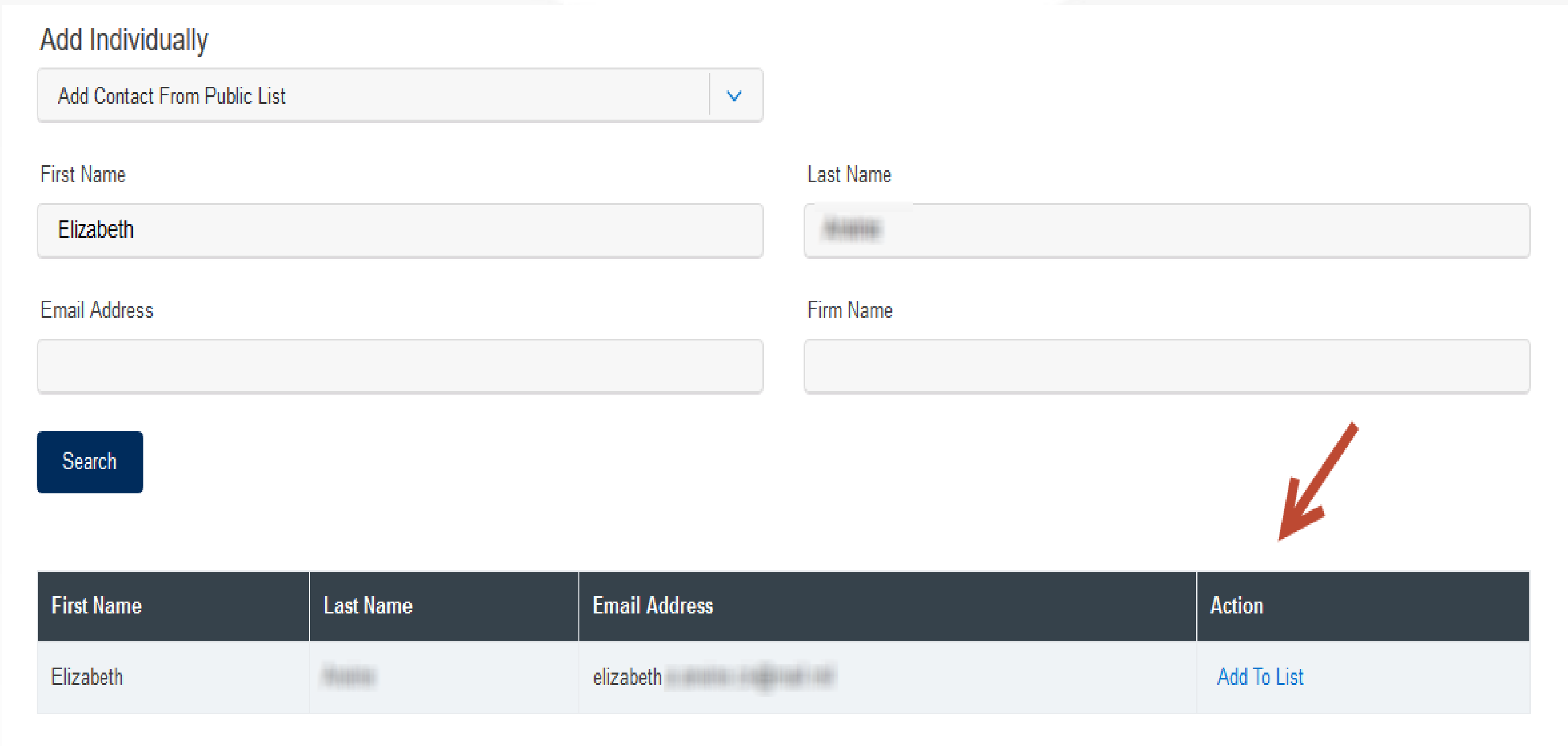
6. Select “**Search**,” and “**Add to List**.” Please see next slide for additional screen shots.



FILING A NEW CASE: Adding Service Contacts

Step 4 – *Service Contacts (continued)*

Adding a Contact from the Public List:



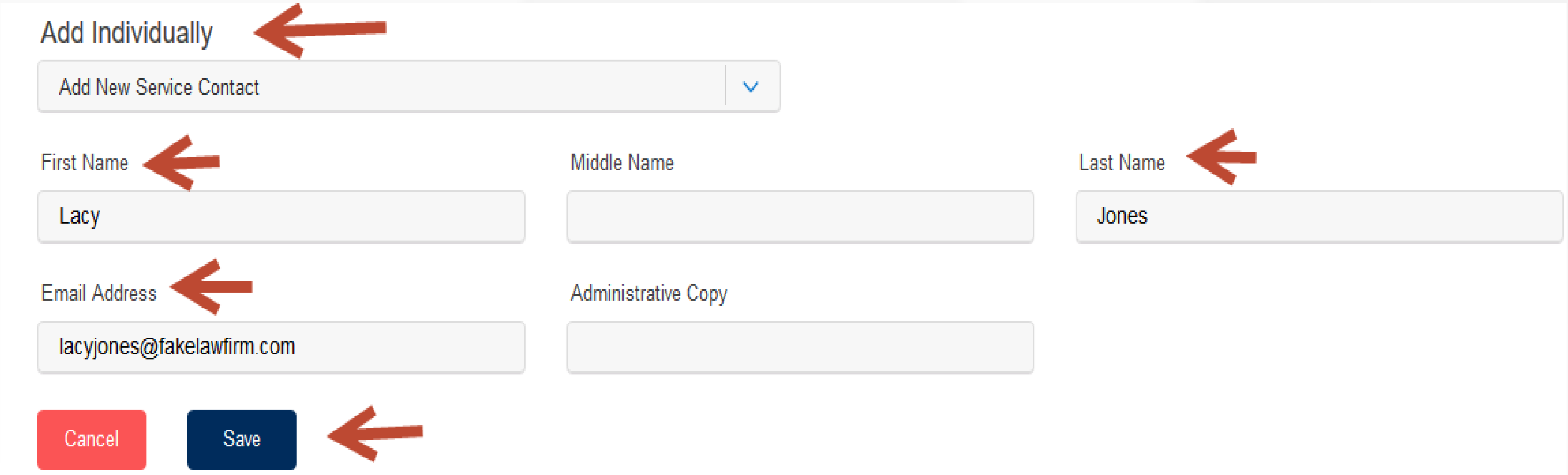
FILING A NEW CASE: Adding Service Contacts

Step 4 – *Service Contacts (continued)*

Adding a New Service Contact:

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

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



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FILING A NEW CASE: Adding Service Contacts

Step 4 – *Service Contacts (continued)*

9. They will be added to the instant service list and to the "**Firm Service Contacts**" under your firm.

10. You can easily search for them under "**Add Contact From Firm Service Contacts**" for any future cases.

FILING A NEW CASE: Removing Service Contacts

To remove a service contact from the service list during the instant transaction, i.e., when you add them, follow these steps:

1. Click on the “trash can” icon next to the service contact under the Action column.

2. If you have accidentally deleted a New Service Contact that you added to the service list, search for them under “**Add Contact from Firm Service Contacts**” to re-add them to the list.

Note: You can only edit a Firm Service Contact. Click on the “pencil icon” to edit.

Who should be notified about this filing?

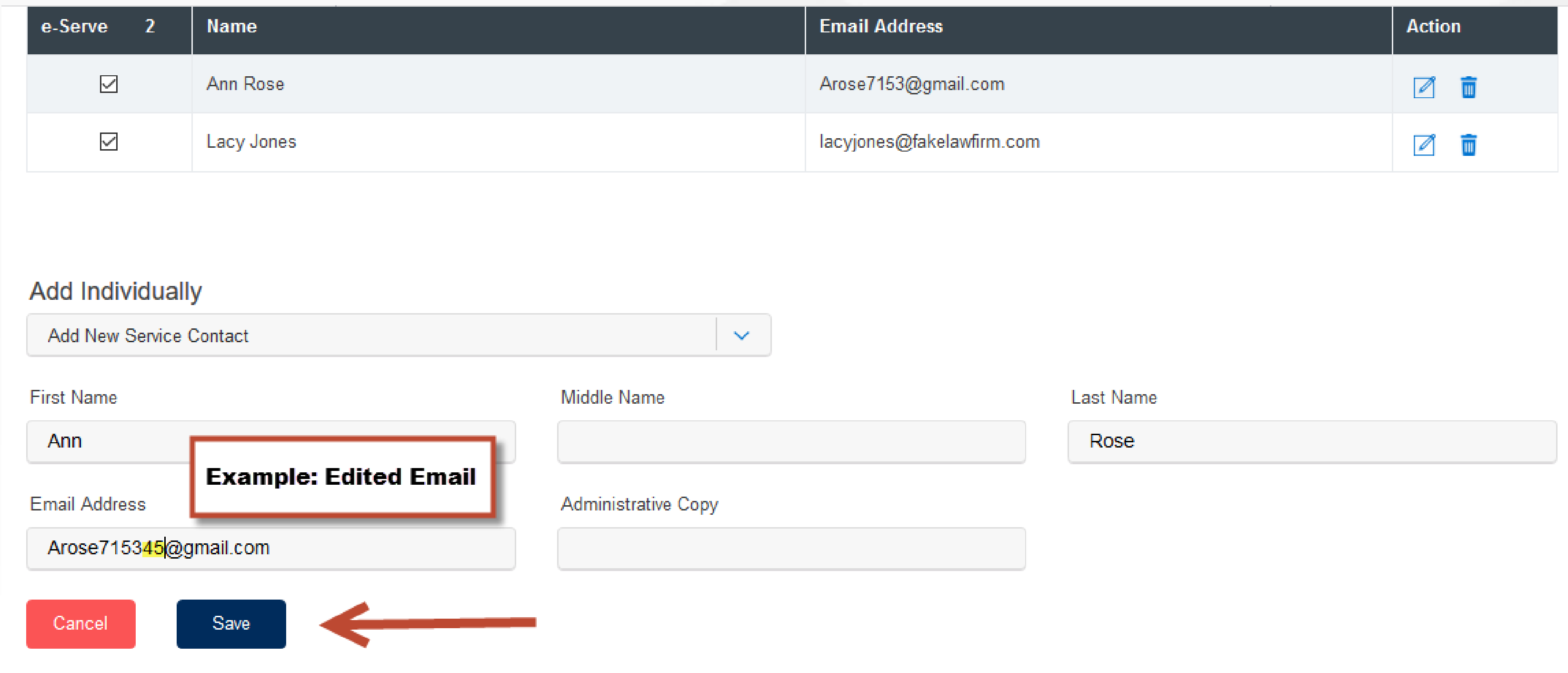
Current Notice List: Parties will be e-Served and notified.

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

FILING A NEW CASE: Removing Service Contacts (*continued*)

3. If you have clicked on the pencil icon to edit a Firm Service Contact, edit the information on the service contact. When the edit(s) is complete, click "**Save**." They will be returned to the service list with the new edit(s).

Remember: You can only edit a Firm Service Contact. You can remove an attorney added from the Public List during the transaction by clicking on the "trash can" icon.



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FILING INTO AN EXISTING CASE: Verifying Service Contacts

Step 4 – *Service Contacts*

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

1. The service list will be auto-populated.
2. You will be able to view the number of contacts on the service list next to the "**e-Serve**" column.
3. You can keep the boxes checked under "**e-Serve**" for those contacts you would like to serve in this transaction.
4. You can de-select the boxes under "**e-Serve**" for those contacts you would like to NOT serve in this transaction.
5. Click on the drop-down menu under the **Attach** 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.

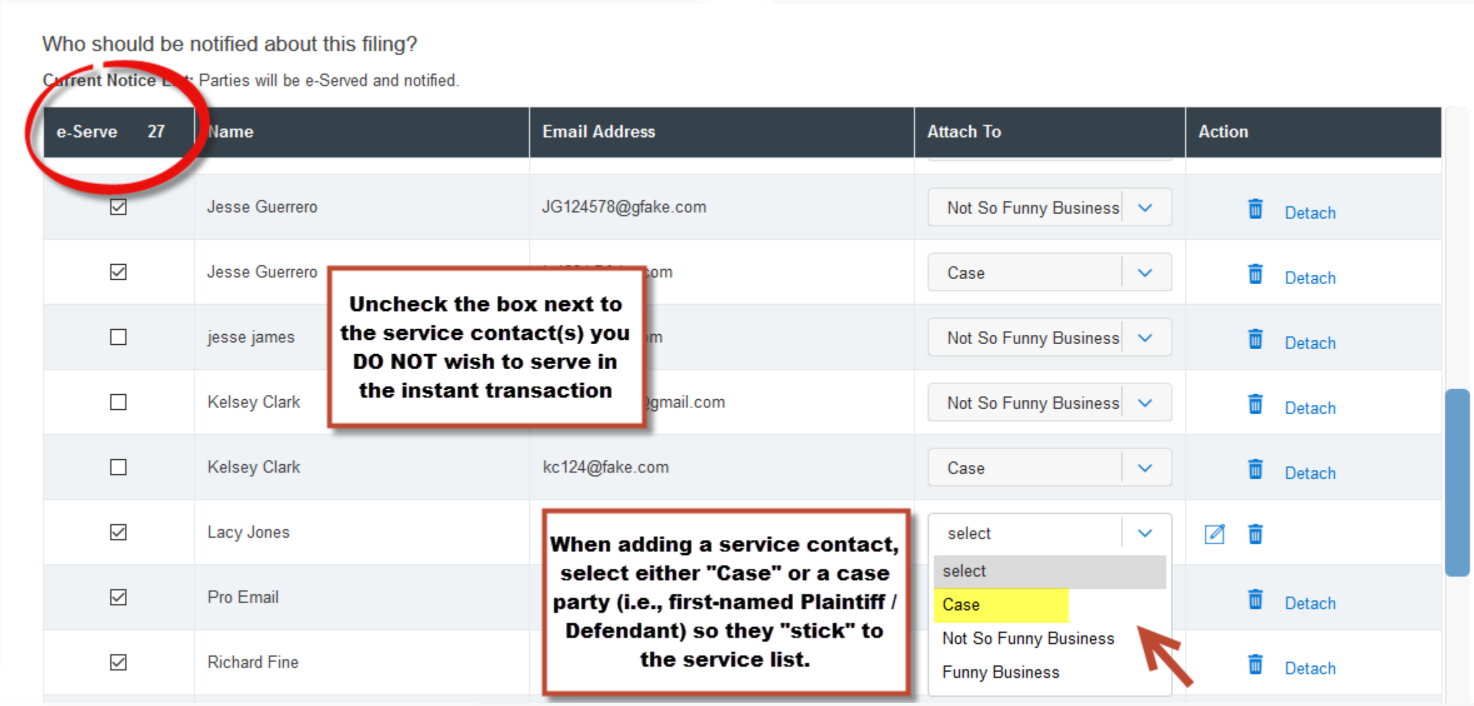
(See next slide for screen shot)

FILING INTO AN EXISTING CASE: Verifying Service Contacts

Step 4 – *Service Contacts*

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

*Select the "Case" if you'd like the Service Contact to be associated in the instant case.
*Select one of the case parties if you'd like the Service Contact to associate/"follow" the party, e.g., if they are involved in other cases.



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FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – *Service Contacts*

Preface:

- **All Service Contacts in each category presented in the next slides must be "attached" to either "Case" or a case party (e.g., first-named Plaintiff).**
- **Some of the Service Contacts cannot be changed, particularly for attorneys that were added from the Public List.**
- **You can only modify (i.e., "Detach" from a case/party or remove with the "trash can" icon) those contacts newly added at the time of the filing – or added by your "own firm" – i.e., a Firm Service Contact.**
- **You cannot edit opposing counsel in the state of Texas added under the Public List. However, if you added an opposing counsel that is out-of-state under "New Service Contact" and saved them to the service list, they will be added under your "Firm Service Contacts". You can easily add them in future cases under "Firm Service Contacts". Or, you can have your Firm Administrator, or the Filer, edit the Firm Service Contact under the "Service Contact" button found in the Firm Admin drop-down menu; or for the Filer, under the "Filing" drop-down menu.**
- **Please note that both Firm Administrator(s) and Filers can add, edit, or remove a Firm Service Contact.**

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FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – *Service Contacts (continued)*

Preface (continued):

To attach to “Case” or a case party, follow the steps below:

Step 1: Click on the drop-down menu next to the Service Contact and select either “Case” or the correct party. The system will automatically “attach” them.

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FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – *Service Contacts (continued)*

Preface (continued):

To attach to “Case” or a case party, follow the steps below :

Step 2: Once the contact has been attached, you will see icons: pencil, trash can; and a “Detach” link under the Action column.

☑	Tyler Smith	tylersmith@fakelaw.com	Case ∨	Detach

FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – *Service Contacts (continued)*

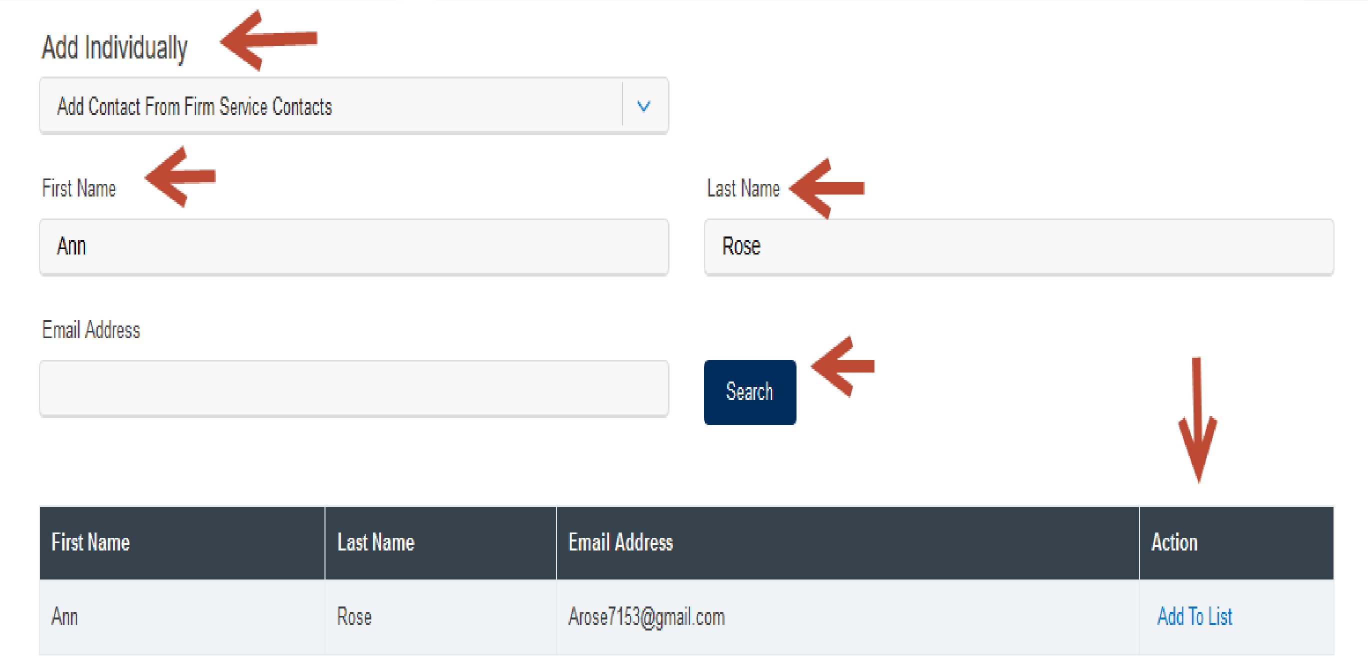
To add service contacts in an existing case using File & Serve *Texas*, follow these steps:

Adding a Firm Service Contact:

1. To add a support staff member(s) from your firm, select "**Add Contact from 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**."



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FILING INTO AN EXISTING CASE: Adding Service Contacts

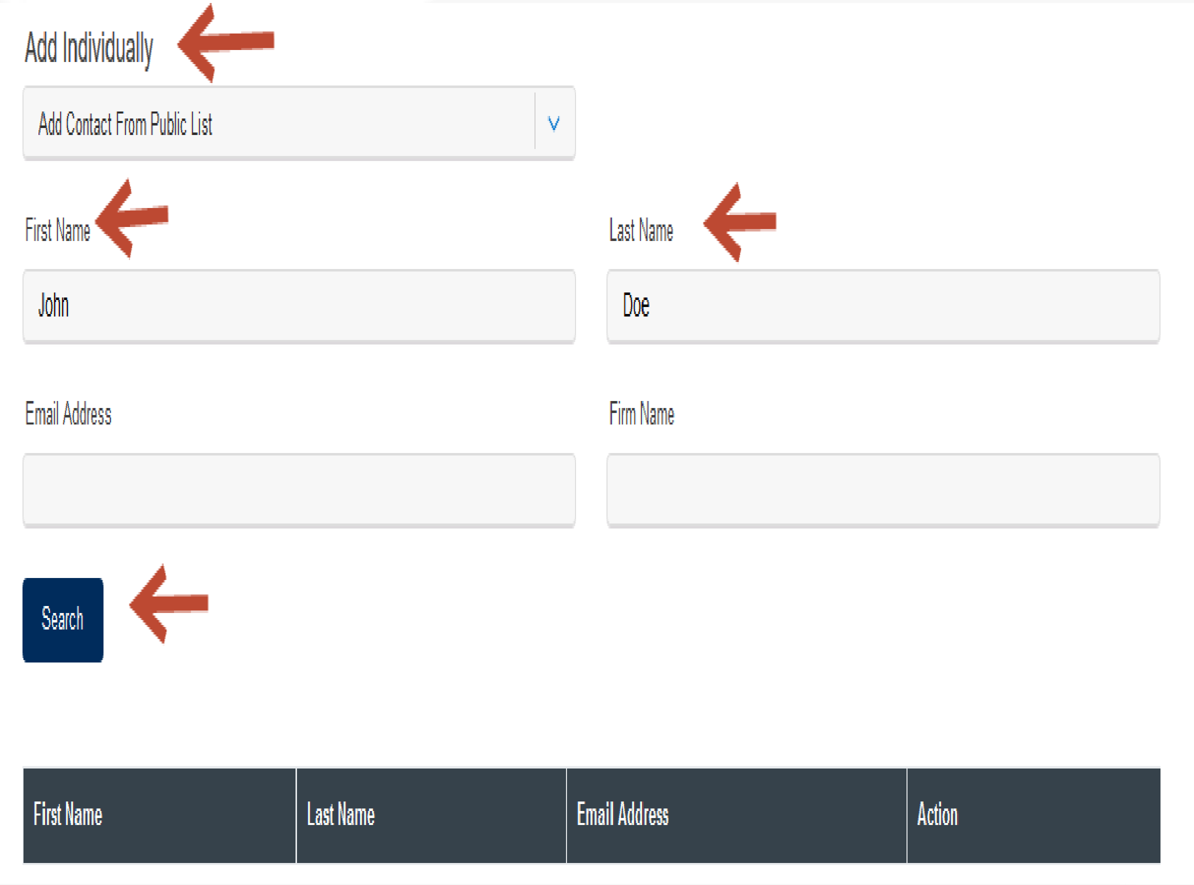
Step 4 – *Service Contacts (continued)*

Adding a Contact from the Public List:

4. To add an attorney in the state of Texas, including the attorney(s) within your firm, select "**Add Contact From Public List**" from the drop-down menu under "**Add Individually**." This is managed by the State Bar of Texas.

5. Enter the first and last name of the attorney(s).

6. Select "**Search**," and "**Add to List**."



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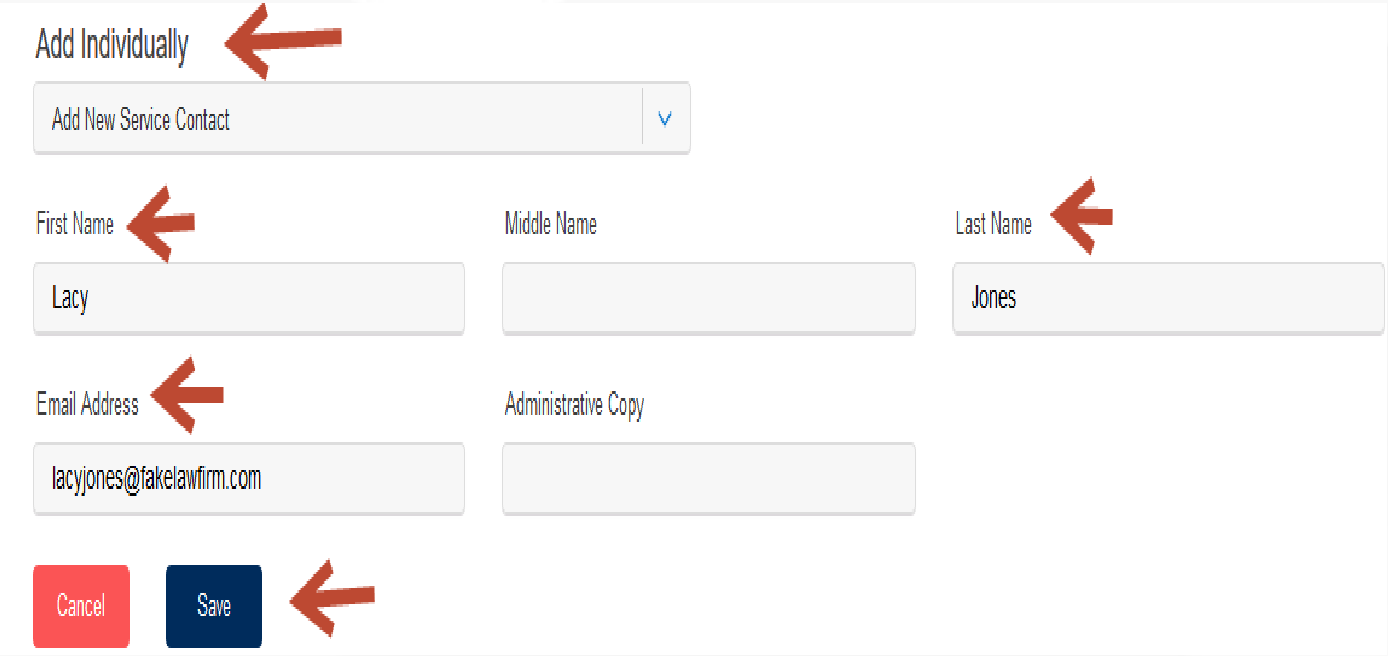
FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – *Service Contacts (continued)*

Adding a New Service Contact:

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

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



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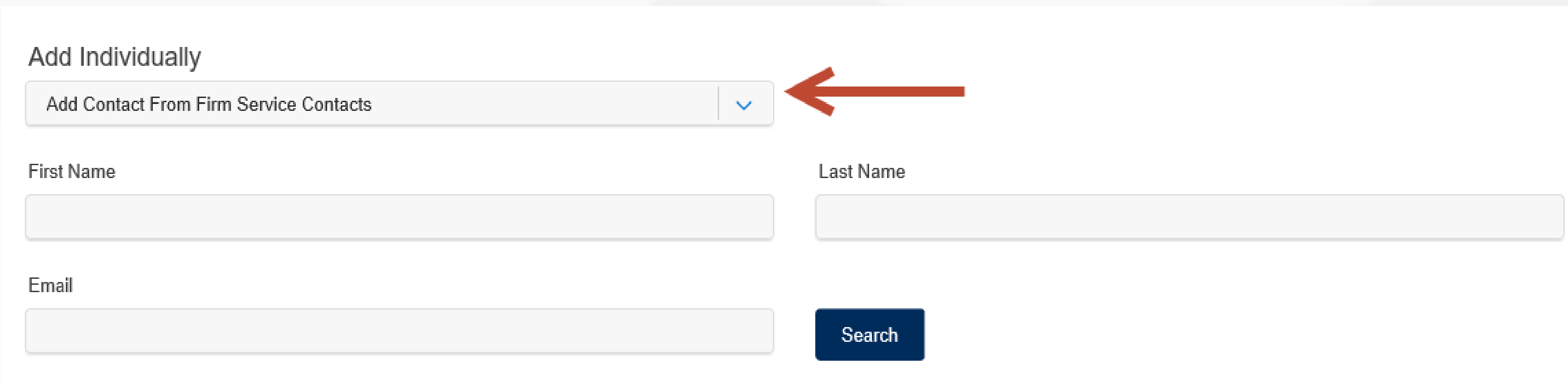
FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – *Service Contacts (continued)*

9. They will be added to the instant service list and to the "**Service Contacts**" under your firm.

10. You can easily search for them under "**Add Contact From Firm Service Contacts**" for any future cases.



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FILING INTO AN EXISTING CASE: Removing Service Contacts

To remove a service contact from the service list in an existing case, follow these steps:

1. Review the service list to make sure it is current and correct.

2. If a service contact is within your firm, i.e., a Firm Service contact, you can perform one of the following action items:

    a. De-Select (uncheck the box) so the contact will not receive service in that transaction;
    b. Detach them from the previously selected party and select the correct party;
    c. Remove them by clicking on the “trash can” icon.

e-Serve 25	Name	Email Address	Attach To	Action
☑	Richard Fine	rf1234@fake.com	Case	Detach
☐	Robert Moran	rm@fake.com	Funny Business	Detach
☐	time go	ttg@fake.com	Case	Detach
☑	Tracie Fields	tf@fake.com	Case	Detach

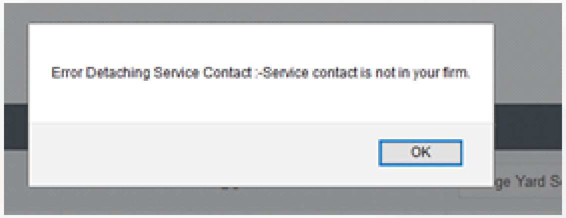
FILING INTO AN EXISTING CASE: Removing Service Contacts (*continued*)

To remove a service contact from the service list in an existing case, follow these steps:

3. If the service contact is not within your firm, you can perform the following action item:

    a. De-Select (uncheck the box) so the contact will not receive service in that transaction.

4. An error message will pop-up if you try to remove a service contact that is not a Firm Service Contact.

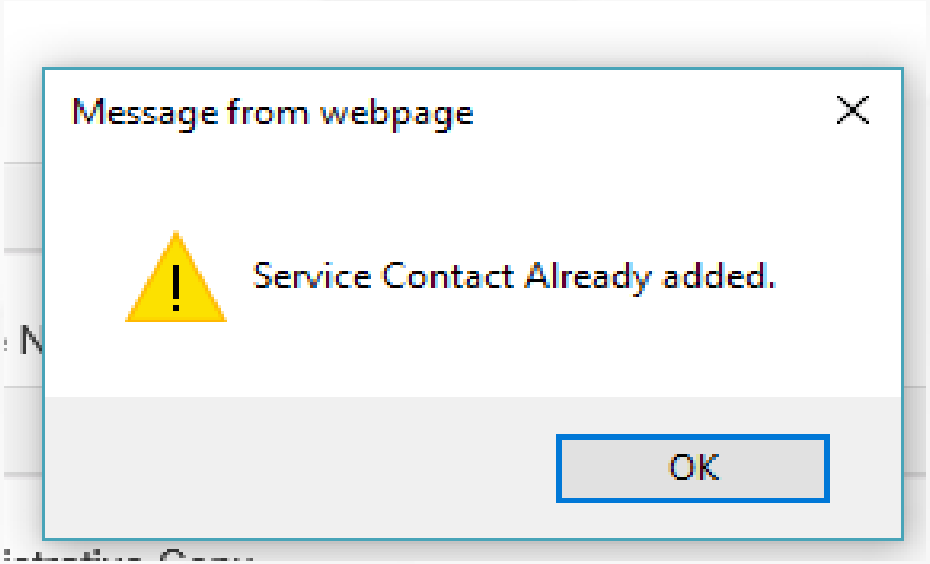


Note: If you have questions, please contact our Client Support department, 1-888-529-7587.

FILING INTO AN EXISTING CASE: Removing Service Contacts *(continued)*

5. If you have accidentally removed a Firm Service Contact that was previously added to the service list as a New Service Contact, search for them under "**Add Contact from Firm Service Contacts**."

<u>**Note:**</u> If you have deleted a New Service Contact and try to search and add them again under, "**New Service Contact**," you will receive this error message below:

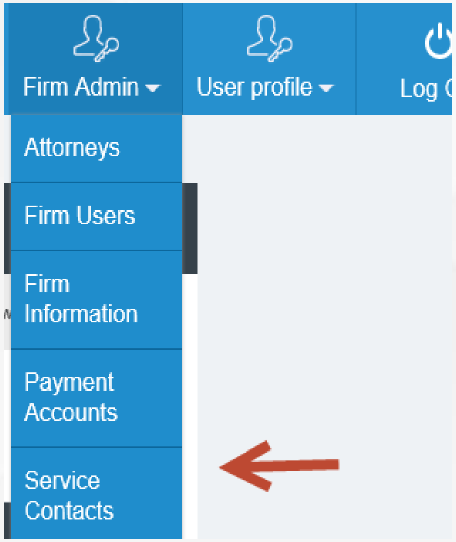


HELPFUL TIPS WITH NEW SERVICE CONTACTS

Both a Firm Administrator and Filer can add, edit, or delete a Firm Service Contact. The edits can be completed prior to a filing or in the middle of a transaction. The steps below are the same for the Filer; *except*, the "Service Contacts" will be housed under the "Filing" drop-down menu.

If you are a Firm Administrator or Filer, please follow the steps below:

Step 1: Select the "Service Contact" button under the Firm Admin drop-down menu; or the Filing drop-down menu.

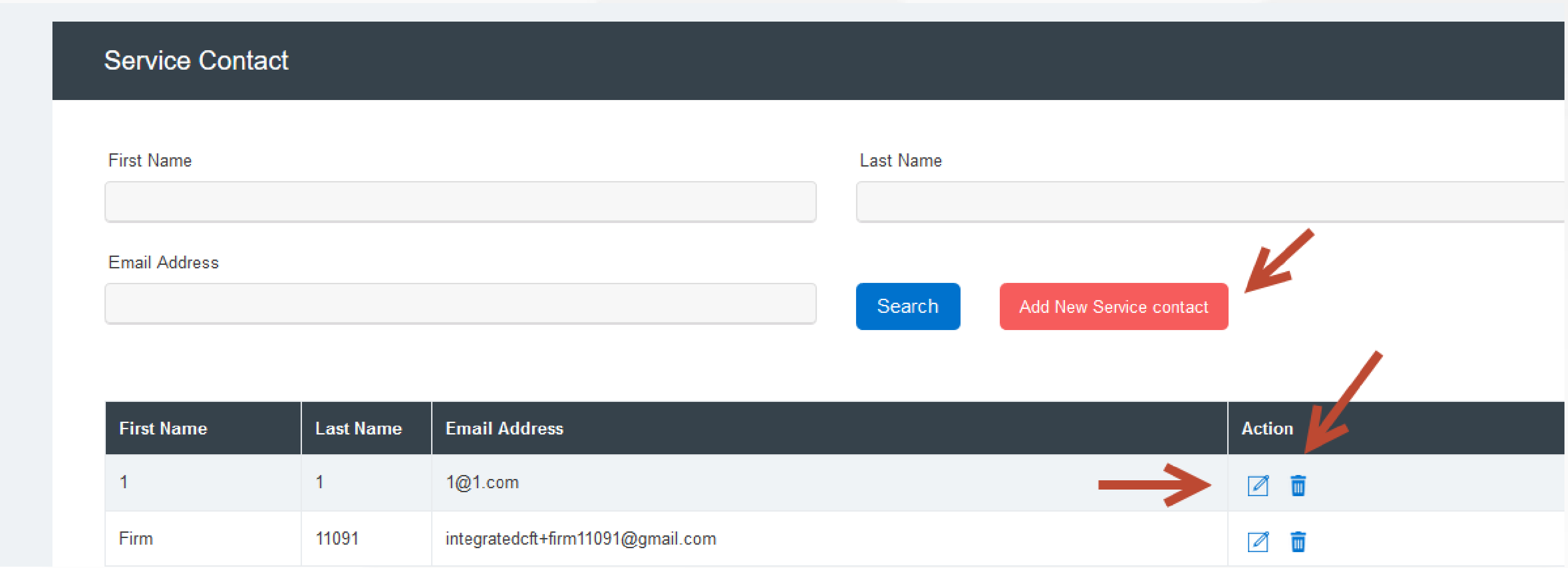


HELPFUL TIPS WITH NEW SERVICE CONTACTS (*continued*)

If you are a Firm Administrator or Filer, please follow the steps below (*continued*):

Step 2: Search for the Service Contact. Edit with the “pencil” icon or remove with the “trash can” icon.

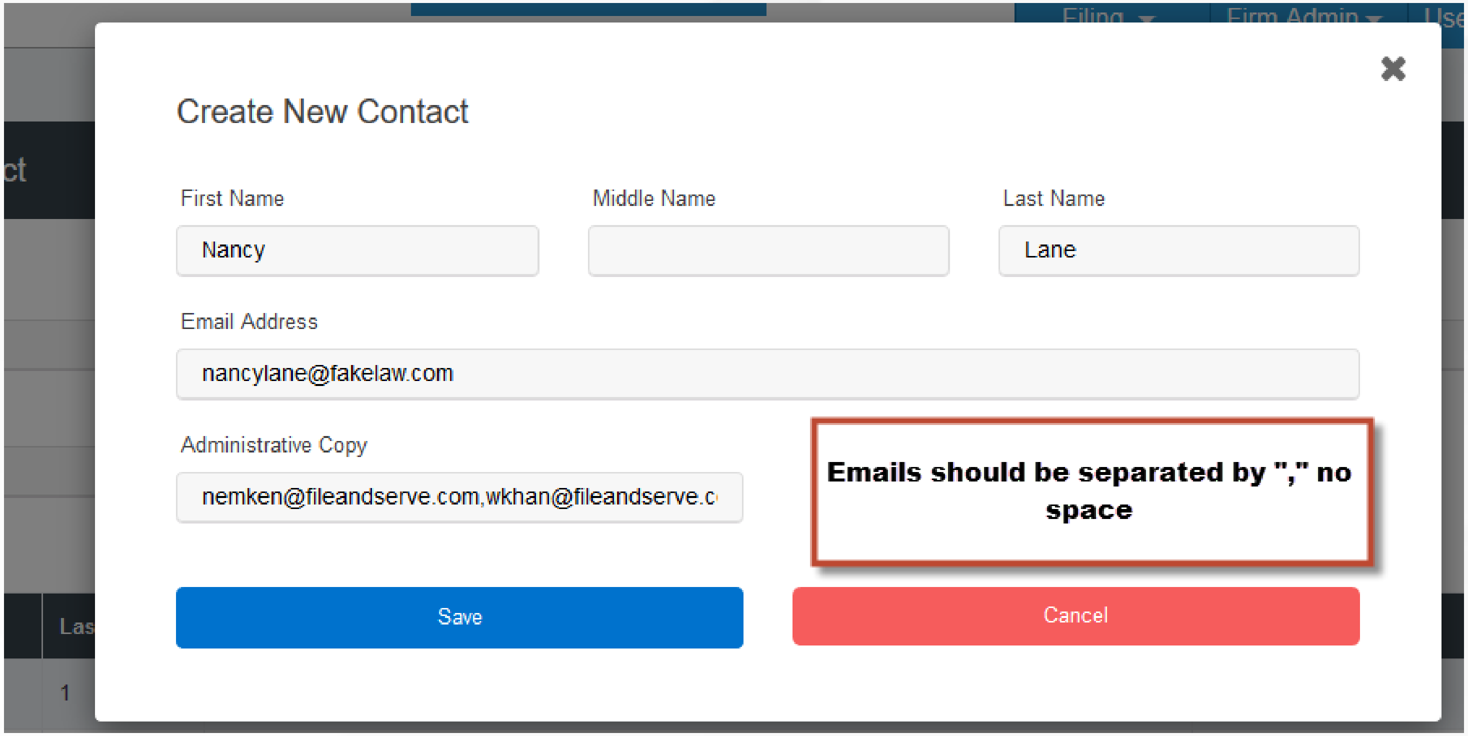
Step 3: To add a firm service contact, enter the first name, last name, and email.
Click “**Add New Service Contact**”.



HELPFUL TIPS WITH NEW SERVICE CONTACTS (*continued*)

If you are a Firm Administrator or Filer, please follow the steps below (*continued):*

Step 4: When adding a new Firm Service Contact, you can place the legal assistant and/or paralegal in the "**Administrative Copy**" field. This allows them to receive the "**Notification of Service**" from EFile Texas when their attorney is served in a case.



HELPFUL TIPS WITH NEW SERVICE CONTACTS (*continued*)

For the Filer:

- Simply log out of the transaction and make the request to your Firm Administrator or complete the Firm Service Contacts adjustments as outlined in the previous slides.
- Log back into File & Serve *Texas*. You will be taken to the Incomplete Filings page.
- Click on "Complete Filing" under Search Result to finish the transaction and submit to the court.

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Incomplete Filings

Search Result

Transaction ID	Jurisdiction	Created on	Created By	Action
101771	Supreme Court	03/28/2017	Mork Bugbash	Complete Filing | Delete Filing