File & Serve Texas™

USER GUIDE

Subsequent Filing: Filing into an Existing Case



File & Serve Texas

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File & Serve Texas SUBSEQUENT FILING: Filing into an Existing Case

SUBSEQUENT FILING OVERVIEW

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

Before You Begin

- Refer to the appropriate court rules on electronic filing prior to using File & Serve *Texas* 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 *Texas*.
- 3. If you need assistance, call our Client Support line at 1-888-247-2051. They are available to help you 24/7/365.
- 4. If there is an error at any point in the filing process, you will be alerted and the message will indicate that you need to contact Client Support.

File & Serve Texas

Logging in to File & Serve Texas

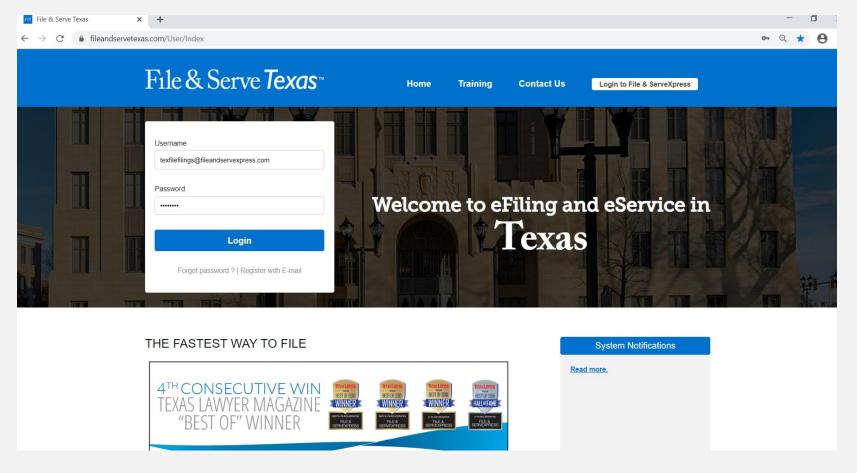
Email
\bowtie
Password
\Box
Login
Forgot Password Register Now

- 1. Open your browser and go to www.fileandservetexas.com.
- 2. Enter your Username and Password and click **Login**.
- 3. You may also login with your Efile Texas Username and Password if you already have one.
- 4. If you do not have a Username/Password, please contact your Firm Administrator.

GETTING STARTED

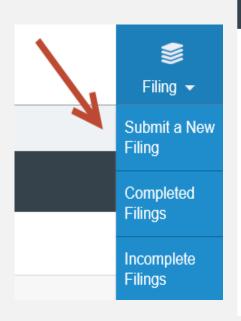


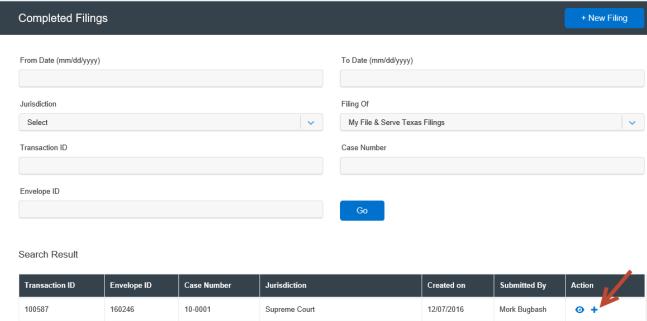
- 1. Access the File & Serve *Texas* login page via <u>www.fileandservetexas.com</u>
- 2. Enter your Username/Password and click "Login".





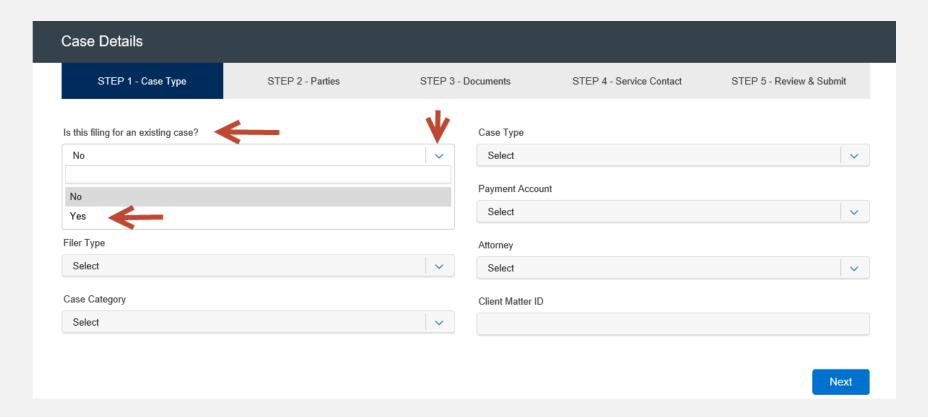
- Once you are logged into your account, you will be taken to the Completed Filings page to begin filing into your existing case.
- 4. You may select from the Filing drop-down menu to "Submit a New Filing," or go to the Completed Filings page and click on the "+" sign next to a transaction that has been accepted by the clerk.





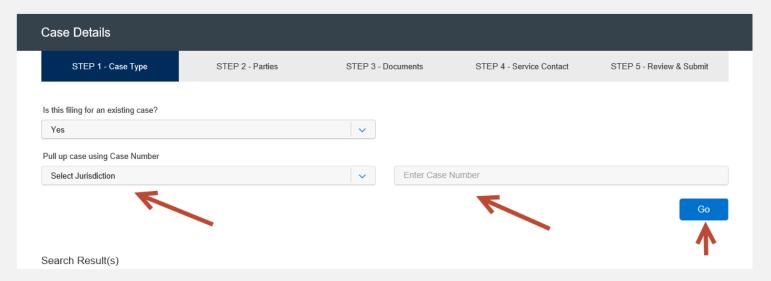


- 5. If you chose to select "Submit a New Filing," you will be taken to the Case Details page.
- 6. In the "Is this filing for an existing case?" field, click on the drop-down menu and select "Yes."





- 7. You will be taken to a new screen to enter the jurisdiction and your case number. Click on "Go."
- 8. Your case will appear at the bottom on the page. Click "Start Filing." This will open up the case to begin the 5-step process to complete your transaction and submit it to the court.



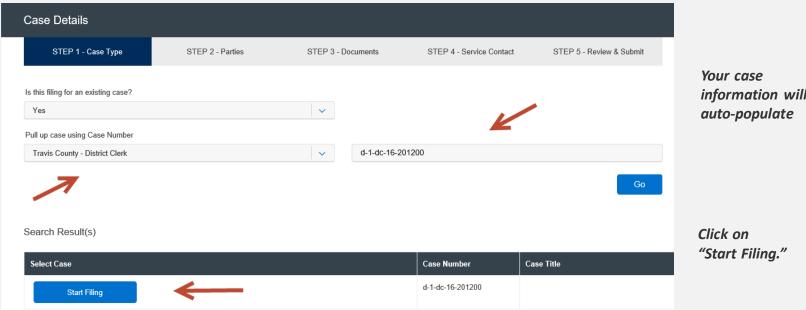
Enter Case Information

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





- If you select the "+" icon on the Completed Filings page, you will be taken to a new page where the jurisdiction and case number will be auto-populated.
- 10. Your case will be housed at the bottom of the screen. Click on "Start Filing" to open up the case and begin the 5-step process to file into your existing case.



information will



- 11. You will be taken to the "Case Details" page. The 5 steps to complete your filing will be displayed.
- 12. Step 1-Case Type Allows you to enter select information for an existing case.
- 13. Step 2-Parties Allows you to verify the parties in the existing case, add a new party if necessary, and select the Sending Party, i.e., who you represent/are filing on behalf of for that single transaction.
- 14. Step 3-Documents Allows you to select the type of document you are submitting, attach your documents, order optional services from the court*, and add courtesy copy emails to allow support staff members and/or attorneys to receive acceptance notifications with the file-stamped document from Efile Texas.
- 15. Step 4-Service Contacts Allows you verify the existing service list; and if necessary, add service recipients from the Public List (i.e., all attorneys in the state of Texas), Firm Service Contacts (i.e., Support Staff members in your firm), and New Service Contacts.
- 16. Step 5-Review & Submit Allows you to review your work and submit the transaction to the court

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

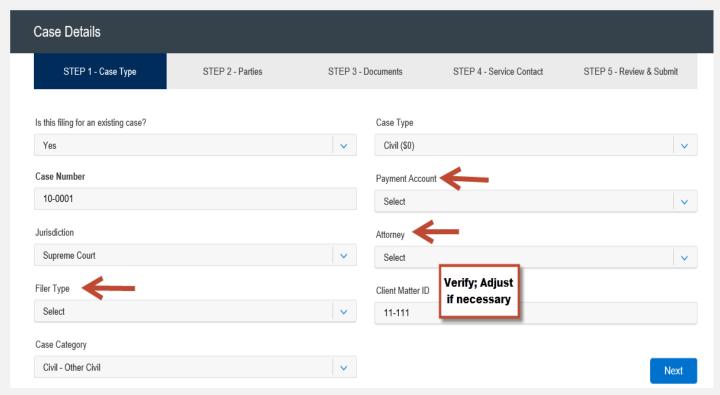
^{*}Available in select jurisdictions

Step 1 – Case Type



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

- 1. The Case Number, Jurisdiction, Case Category, Case Type, and Client Matter ID will be auto-populated.
- 2. Select the Filer Type, Payment Account, and Attorney. Adjust the Client Matter ID if necessary.
- 3. Click "Next" to move to Step 2-Parties. The system will be auto-saving the information as you click "Next."

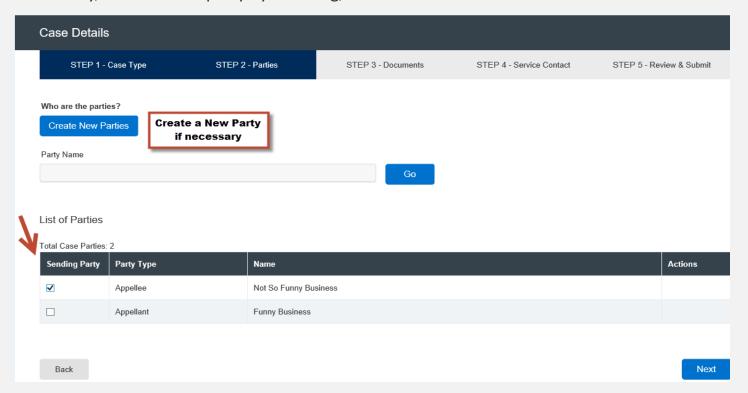


Step 2 – Parties



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

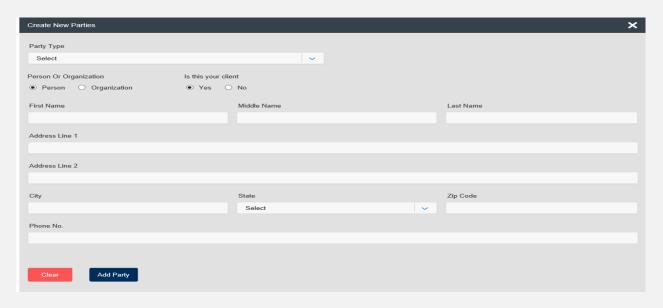
- 1. The List of Parties will be auto-populated.
- 2. Select the Sending Party for this transaction by checking the appropriate box.
- 3. If necessary, create a new party by selecting, "Create New Parties."



Step 2 – Parties (continued)



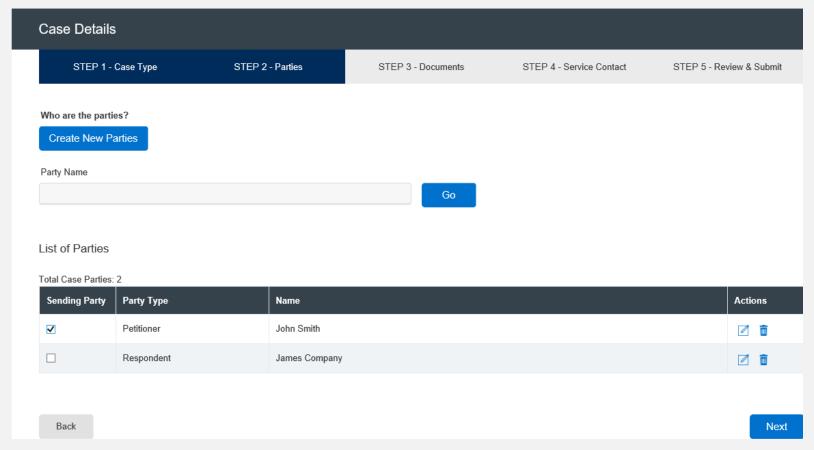
- 4. If you select, "Create New Parties," a new screen will pop-up.
- 5. Select "Party Type" from the drop-down menu. *Note: A Party Types with an "*" is required in that jurisdiction.*
- 6. Select the radio button if the party is a "Person" or an "Organization."
- 7. Select the radio button if the party is your client or not by selecting "Yes" or "No."
- 8. Enter the party's First Name, Last Name, Address, and Phone No. *Note: Please check with your attorney, local rules, and/or your firm administrator on court requirements or policies regarding providing an address and telephone number.*
- 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.







- 11. Your List of Parties will be displayed at the bottom of the screen.
- 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.

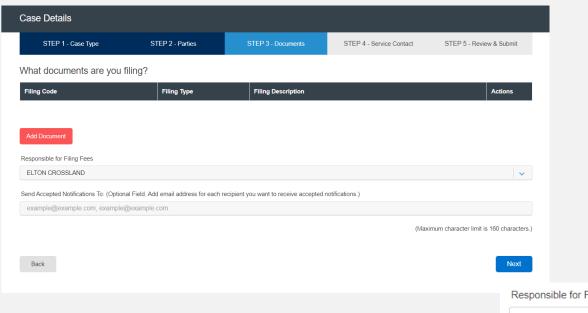




Step 3 – Documents

To upload and attach documents in the existing case using File & Serve Texas, 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.



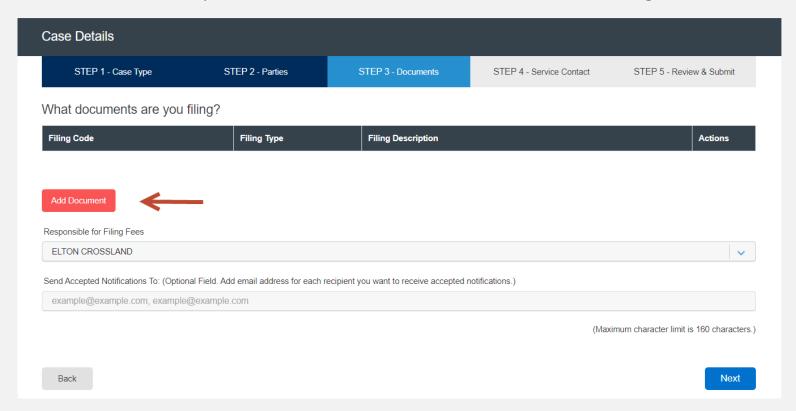
14

Step 3 – Documents (continued)



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

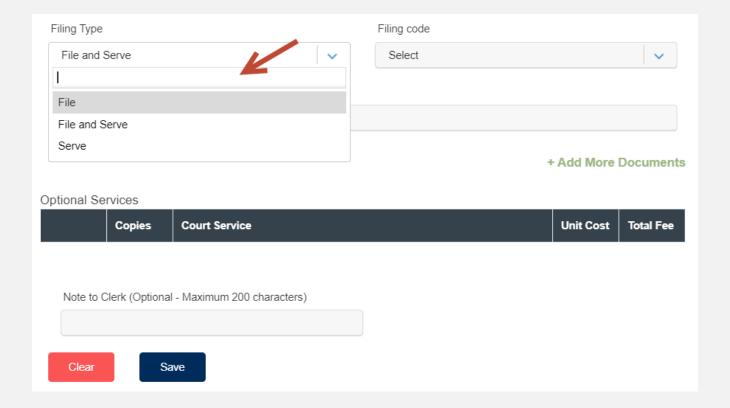
Note: Only the Lead Document will be displayed, including the Filing Code, Filing Type, and (Filing) Description. You can edit the Lead Document and its Attachment by clicking on the "pencil" icon under the Action column. Or, you can click on the "trash can" icon to remove and start again.







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".

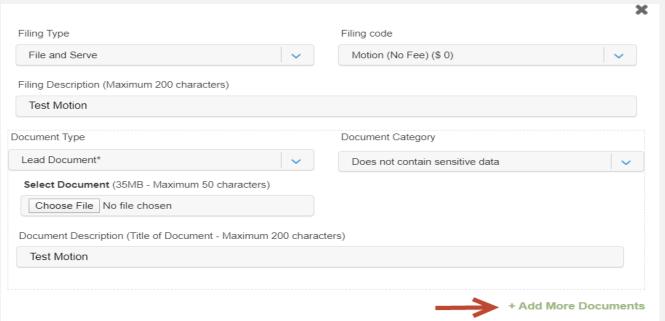


Step 3 – Documents (continued)



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- 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. Select the Document Type (Lead/Attachment/Proposed order) This will vary based on the Court.
- 7. Document Category.
- 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".
- 9. Note the document size limit of 25MB; Envelope size is 35MB
- 10. To add more documents, click on Add More Documents as seen below.



Step 3 – Documents (continued)



11. 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.



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

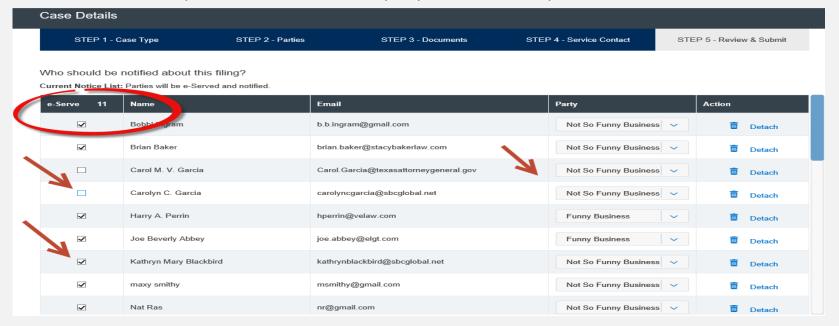


Step 4- Service Contacts



To verify and/or add e-service recipients 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 people on the service list next to the "e-Serve" column.
- 3. You can keep the boxes checked under "e-Serve" for those recipients you would like to be served in this transaction.
- 4. You can de-select the boxes under "e-Serve" for those recipients you would like NOT to be served in this transaction.
- 5. Make sure the recipients are "attached" to a party under the "Party" column.

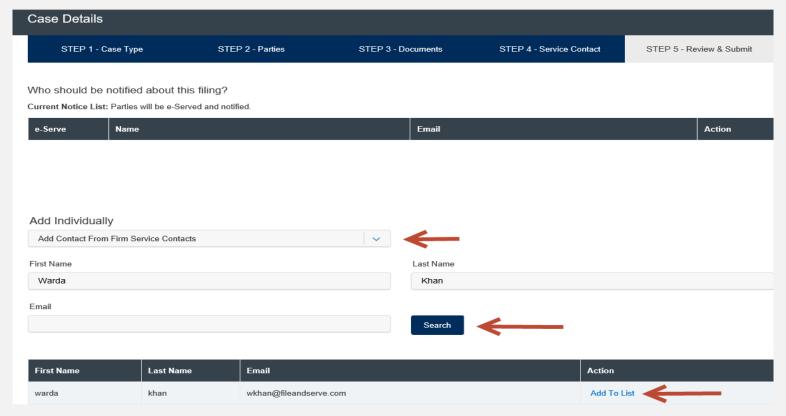


Step 4- Service Contacts (continued)



To create e-service recipients in an existing case using File & Serve *Texas*, follow these steps:

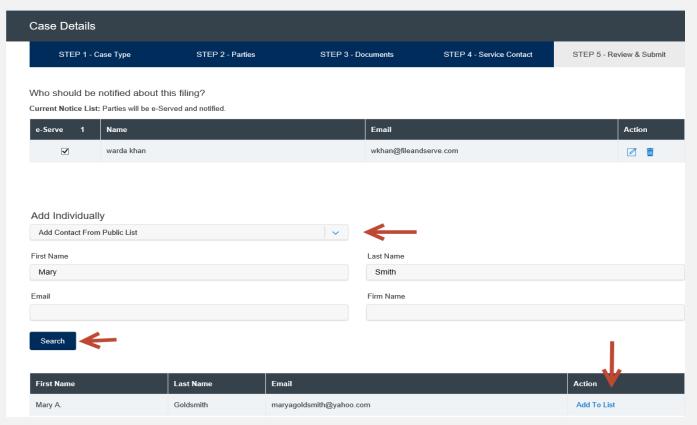
- 6. Select Firm Service Contacts from the drop-down menu under "Add Individually."
- 7. Enter the first and last name of the support staff member(s) in your firm.
- 8. Select "Search," and "Add to List."







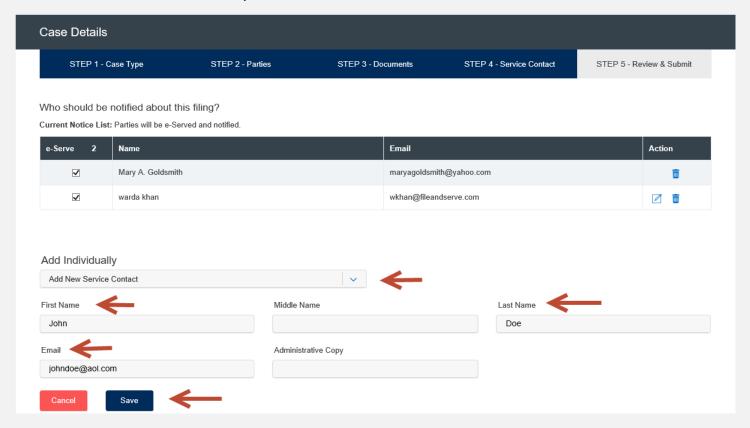
- To add an attorney in the state of Texas, including the attorney(s) within your firm, select "Add Contact
 From Public List" from the drop-down menu under "Add Individually." This is managed by the State Bar of
 Texas.
- 10. Enter the first and last name of the attorney(s).
- 11. Select "Search," and "Add to List."







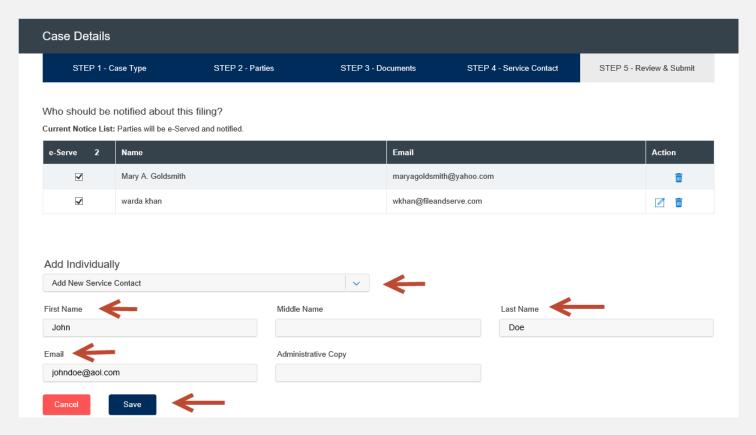
- 12. To add a New Service Contact, select "Add New Service Contact" from the drop-down menu under "Add Individually."
- 13. Enter their first name, last name, and email address. Click "Save." They will be added to the service list and Firm Service Contacts under your firm.







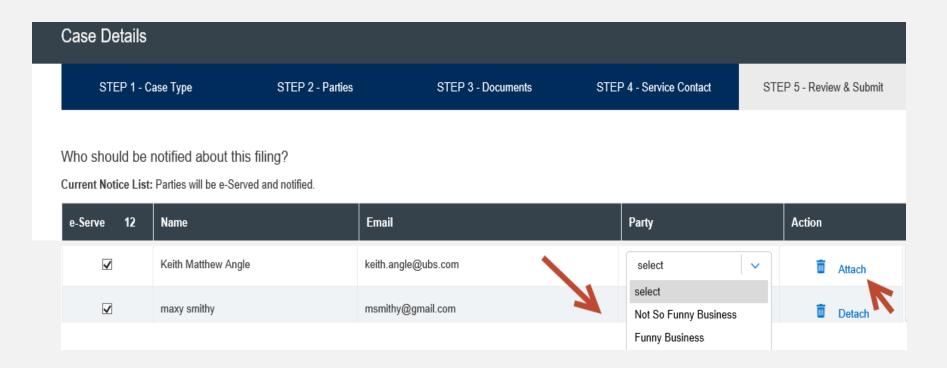
- 14. You will be able to easily search for them under "Firm Service Contacts" in any future cases.
- 15. Your Firm Administrator can make any updates to Firm Service Contacts under the "Service Contacts" button under the "Firm Admin" drop-down menu.







- 16. When adding a new service recipient to the service list in any of the above-listed categories, please select the party they relate to in the case from the drop-down menu under the Party column. Next, under the Action column, click "Attach".
- 17. Click "Next" to move to Step 5-Review & Submit.

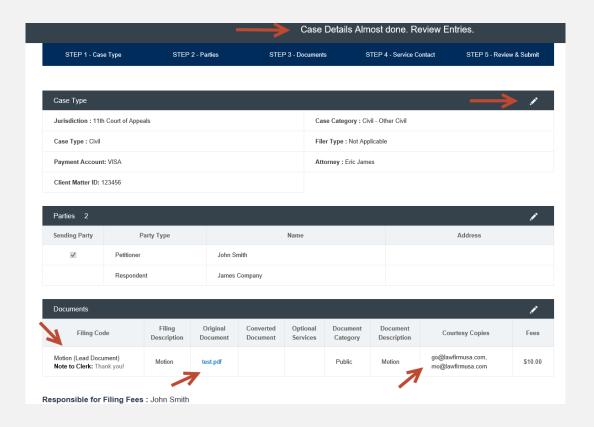


Step 5- Review & Submit



To review your transaction details prior to submitting to the court using File & Serve *Texas*, follow these steps:

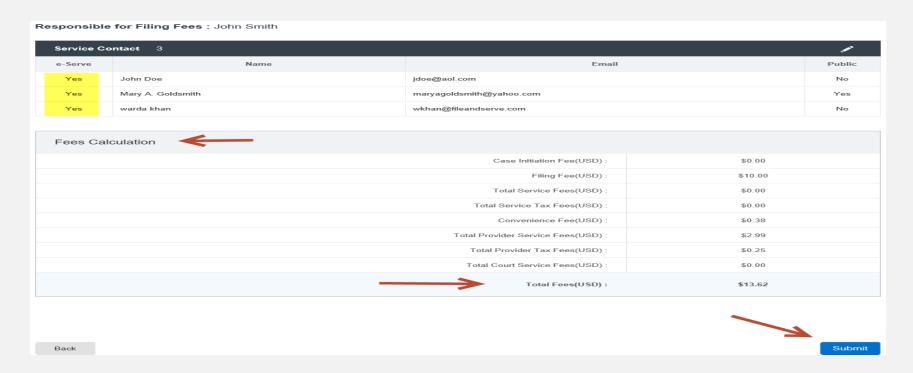
- Using your scroll bar, review each section.
- If you find a mistake in a particular section, you can click on the pencil icon to fix that particular section.
- Review each section, and make sure all documents are uploaded, Courtesy Copy emails are next to each Lead Document in the transaction.



Step 5- Review & Submit (continued)



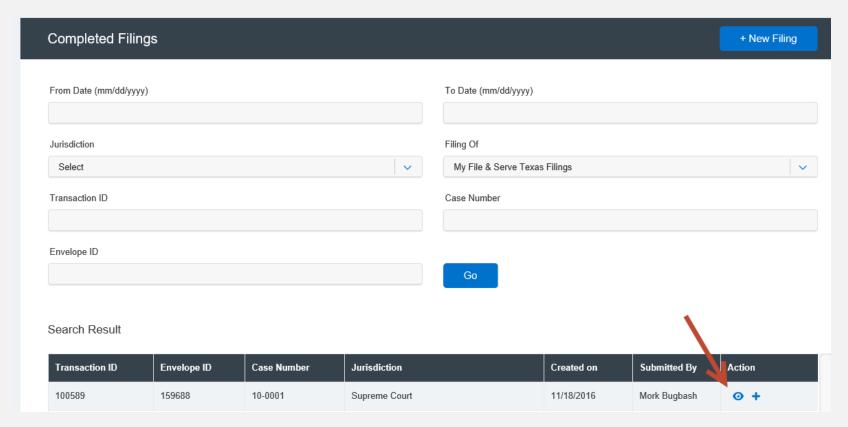
- 4. Continue scrolling through the transaction details, including making sure the correct party is listed who is "Responsible for Filing Fees," the e-service recipients you've selected will have "Yes" next to their name(s) to be served when you submit to the court. If you have de-selected anyone on the service list, the recipients will have "No" next to their names in the e-Serve column.
- 5. All fees associated with the transaction will be listed for your review.
- 6. Click on "Submit" for immediate filing to the court and service on the selected parties.







- 7. After you click "Submit," your Envelope ID will pop up. Click "Ok."
- 8. You will be automatically taken to the Completed Filings page.
- 9. You will be able to view the Transaction Summary by clicking on the "eyeball" icon next to the transaction under "Search Result."



LOCATING YOUR FILE-STAMPED DOCUMENT



In File & Serve Texas

Once you receive the Accepted notification from Efile Texas, you will be able to view your file-stamped document within File & Serve *Texas*. Please follow these steps using File & Serve *Texas* 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
Accepted (10/26/2016 14:36)	Motion (No Fee) (Lead Document) Note to (E) Clerk:	DEFENDANT'S SECOND SUPPLEMENT TO THIRD AMENDED PLEA TO THE JURISDICTION	D's 2nd Suppl to 3rd Am PTJ-L.pdf		D's 2nd Suppl to 3rd Am PTJ-L.pdf		Does not contain sensitive data	DEFENDANT'S SECOND SUPPLEMENT TO THIRD AMENDED PLEA TO THE JURISDICTION

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.

