



File & Serve *Xpress*<sup>™</sup>

# Document Upload

User Guide

# Document Upload

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## File & ServeXpress has many resources available to you in order to address your questions and concerns.

- » **File & ServeXpress 24/7 Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 1-888-529-7587.
- » **File & ServeXpress Resource Center** is available within File & ServeXpress by clicking on the Resource Center link at the bottom of your screen. The Resource Center contains our training registration information, jurisdiction specific rule & procedures, user guides, best practices, pricing and much more!
- » **File & ServeXpress Login Page** is where you can find password help, what's new and any important information like scheduled maintenance or system changes. Click [here](#) to access the login page.
- » **File & ServeXpress Notices** is an information page that is available on the top, right-hand side of the File & ServeXpress Home tab, once you sign into File & ServeXpress. This page will provide you with any critical information, such as system maintenance or downtime, changes in fees, legal notices, litigation launches and much more.

# File & ServeXpress Resources

# Document Upload Overview

All law firm users have access to the Document Upload feature, which is available in the Track & Manage section of the File & ServeXpress home page.

The screenshot shows the File & ServeXpress home page. The 'Track & Manage' section is highlighted, and the 'Document Upload' option is circled in blue. The 'Quick Start' section shows a search for '2011CV126' in 'CO Mock County District Court' with buttons for 'File/Serve', 'Case Search', and 'Set Track Case'. The 'MailBox' section shows 'Inbox', 'Sent Items', 'Rejected Items', and 'Saved Transactions'. The 'Alerts' section shows 'Tracked Items', 'Edit Tracked Items', and 'Calendar'. The 'Message Boards' section shows 'My Attorneys', 'Case View', 'Document Upload', 'Case & Party Management', 'Billing Information', and 'Custom Document Lists'.

This feature gives firms the ability to upload “private” documents that are related to the case but are not already a part of the electronic case history so that firms can have access to them via File & ServeXpress.

All documents uploaded using this feature are only viewable by the uploading firm. **Document Upload** will be beneficial to firms that would like to use File & ServeXpress as a document management system or would like to have a truly “complete” online case file.

## Document Upload Tips:

- ✓ **Pricing:** This is a premium feature and there is a per-transaction price of \$1.00/upload for the firms. **Note:** ALWAYS CHECK THE FILE & SERVEEXPRESS RESOURCE CENTER FOR MOST UP-TO-DATE PRICING
- ✓ **Limitations:** There is no “scan-on-the-fly” option for the law firm Document Upload. In order to upload a document in this feature, the firm must already have an electronic copy of the document. There is also **no file size limitation** on Document Upload transactions.
- ✓ **Access Level:** Document Upload transactions are private to the uploading organization and only that organization can view these transactions on the system.

# Document Upload

1. Click the **Document Upload** link.
2. Use the drop down menus and open field to select **Jurisdiction (State)**, **Court and Case Number** for which you would like to upload a document.
3. Click the “Find Case” Button.

## Document Upload

Upload a document for your organization.

\* Required fields

### Case Information:


Select a Jurisdiction, a Court and enter Case Number information. Click **Find Case** to search and select a case.

\* Jurisdiction: Colorado ▼

\* Court: Colorado Mock County Court ▼

\* Case Number: ⓘ contains ▼ 2017

Find Case



4. Choose the radio button next to the correct case and click the “Select Case” button.
  - a. The system will only display search results based upon whether the organization is either an active case participant or had been a case participant.
  - b. If a firm has been withdrawn or dismissed from a case on File & ServeXpress, they will still be able to upload documents into that case if desired.

Show  records 1-2 of 2 Cases <<Prev Page 1 of 1 Next>>

Case Number	Case Name	Case Status
<input type="radio"/> 2011c34567	Stevens, Richard vs. Mahoney, Kenneth	Active
<input checked="" type="radio"/> 2011C1611	Mock Collections Agency vs. Frombo, Dabny	Active

1-2 of 2 Cases <<Prev Page 1 of 1 Next>>

[Select Case](#)



- Use the Radio Buttons to choose a “Sending Party” to designate which party the document should be associated with.

\* Sending Party:

<input type="radio"/> Party	Type	Status	Attorney	Firm
<input type="radio"/> N/A	N/A	Active	James, Judge	Colorado Mock District Court
<input checked="" type="radio"/> Mock Collections Agency	Plaintiff	Active	Powers, Max	Mock Appeals Firm B-Demo
<input type="radio"/> Frombo, Dabny	Defendant	Active	Pro Se	Pro Se-
<input type="radio"/> Frombo, Constance	Defendant	Active	Pro Se	Pro Se-

6. Enter a date (the system will default to the current date and time, but the user can post-date the document – you cannot enter a future date).

**Document Details:**  
Enter the document details below.

\* **Date Filed:**  (mm/dd/yyyy)  (hh:mm AM/PM) MST

\* **Document Type:**  ▼

\* **Document Security:**  ▼  
Private Upload documents are only available to users in the uploader's organization.

\* **Document Title:**   
Maximum text length is 510 characters

\* **New Document:** Click **Browse** to select a file from your computer or network and then click **Attach Document** to upload  
 Generic Sam...xhibit.docx

7. Select a Document Type.
8. The Document Security on this feature is a default of “Private Upload” – the user cannot override that default.
9. Enter a Document Title to describe the document.
10. Click the “Choose File” button to open your computer’s hard drive and select the document to upload.
11. Click “Attach Document”.

## Document Upload Tips:

- ✓ **Document Type:** this drop-down menu will contain the full list of document types enabled for the court and case that is selected, allowing users to designate a document type that is normally a Court-issued document.
- ✓ **Document Security- Private Upload:** Private Upload documents are only available to users in the uploader’s organization.
- ✓ **Billing Reference:** If a Billing Reference is entered it will appear on the firm’s monthly invoice. The Billing Reference fee can be set as mandatory for the firm through the Organization Administrator’s Preferences section.
- ✓ **Replacing a Document:** If the incorrect document is selected, click on the [link](#) to choose a different document.
- ✓ **Size Limitations:** There is no limit to the size of documents that can be uploaded using the Document Upload feature.

Document Upload Fee: \$0.00  
Billing Reference:   
To learn more about using this feature visit the [Resource Center](#) page.

[Cancel](#) [Submit Document](#)



12. Enter a Billing Reference.
13. Click “Submit Document”.
14. After the document is uploaded to the system, you will receive a transaction receipt.

[Home](#) > [Document Upload](#) > [Transaction Receipt](#)

Your document has been successfully uploaded to File & ServeXpress.

To perform another transaction, click [Upload Another Document](#).  
To exit, click [Return to Home](#).

**Details:**

**Authorized by:** Powers, Max  
**Submitted by:** Powers, Max  
**Court:** Colorado Mock County Court  
**Case:** [2011C1611](#)  
Mock Collections Agency vs. Frombo, Dabny  
**Filed On:** 11/10/2017 3:31 PM MST  
**Filing Option:** Document Upload

**New Document:**

**Document ID:** 34875261  
**Document Type:** Interrogatories  
**Document Security:** Private Upload  
**Document Title:** [Interrogatories \[view\]](#)  
**Transaction ID:** 52479819

**Sending Party:**

**Party:** Mock Collections Agency  
**Type:** Plaintiff  
**Status:** Active  
**Attorney:** Powers, Max  
**Organization:** Mock Appeals Firm B-Demo

[Return to Home](#) [Upload Another Document](#)



# Searching for “Document Upload” Documents

Because Document Upload transactions are private to the uploading organization, only that organization can view these transactions on the system. While Document Upload transactions can be viewed through any of the Searches on File & ServeXpress, the Case History search is the only one that has a specific radio button filter that allows the organization to view only their uploaded documents or all documents (including the Document Upload Transactions). Selecting this radio button will only provide “Document Upload” documents in the search results.

## Case History Search

Use this search to review all firm accessible transactions both filed and served into a specific case. Your results may include pending and rejected transactions based on search criteria and case settings. Access to service documents will be determined by the service options selected by the filer.

Define your search: (\* indicates a required field.)

1. Select a court and enter a case name below.
2. To change the scope of your search, enter dates in the *Start Date* and *End Date* fields.
3. Then click **View**.

\* Jurisdiction:

\* Court:

\* Filter:  My Transactions  Transactions in My Firm's Cases  All Transactions

Case Number:  Case Name:

or

Case Group Name:

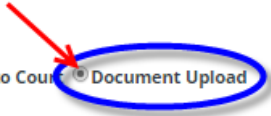
with

\* Transaction Option:  All Documents  All Documents Sent to Court  Document Upload

Start Date:  (mm/dd/yyyy)

End Date:  (mm/dd/yyyy)

Display as color-coded docket



## Document Upload Tips:

- ✓ **Document Access:** Only the organization that uploaded the document can view it.

All Document Upload transactions will appear for the uploading organization when they run a search and request “All Documents”.

Transactions will only appear in the results for Case History, Advanced Search, and Quick Find / Quick Case.

When Attorneys on cases that contain privately uploaded documents leave a firm, the Document Upload transactions WILL REMAIN with the organization that uploaded the document– the Document Upload transaction will NOT “move” with the attorney to their new organization.

**Submitted By:** Court Plaintiff Defendant **Case History Search** Printable Version  
 Search Created: 11/10/2017 16:02:38 GMT-0700 (Mountain Standard Time)

**Court:** Colorado Mock County Court **Judge:** James, Judge **File & ServeXpress Live Date:** 1/6/2011  
**Division:** 1 - Division 1 **Case Number:** 2011C1611 **Document(s) Filed:** 1  
**Case Type:** Money **Case Name:** Mock Collections Agency vs. Frombo, Dabny **Date Range:** All  
 Choose an action:   | Show  records [Judgment Information](#)

1 transaction <<Prev Page 1 of 1 Next>>

Transaction	Date/Time	Option	Case Number Case Name	Authorizer Organization	Document Type	Document Title	Review Status	Size
<input type="checkbox"/> 52479819	11/10/2017 3:31 PM MST	Document Upload	2011C1611 Mock Collections Agency vs. Frombo, Dabny	Max Powers, Mock Appeals Firm B-Demo	<input type="checkbox"/> Interrogatories	Interrogatories <a href="#">[view]</a>	N/A	0.1MB

1 transaction <<Prev Page 1 of 1 Next>>

Note: By selecting “All Documents” as the Transaction Option in Case History, the user will be able to see the entire docket including any “Document Upload” transactions.

### Document Upload Tips:

- ✓ **Billing Reference:** The Organization Administrator for a law firm can make the Billing Reference for this Document Upload mandatory under the Mandatory Billing References section in Preferences.
- ✓ **Multiple Cases/Documents:** Documents can only be uploaded into one case at a time.
  - The feature also only allows the user to upload one document at a time.
  - There is no option to upload the same document into multiple cases.
- ✓ **Availability Limitations:** The Document Upload feature is not available to Third Party Filers as they are not considered activate case participants.