

CASE INITIATION

STEP 1- Log Into

1. Log into FSX @ <https://secure.fileandserveexpress.com/Login/Login.aspx>
2. Type in your User ID and Password.
3. Click "Sign In".

Sign In to File & Serve Xpress™

2 Max Powers

.....

3 Sign In

[Register](#) [Forgot Password](#)

Need more help?
Call Customer Support at 1-888-529-7587

STEP 2 - How to Start a Transaction

1. On the Home Page, hover over "Filing & Service".
2. Select "Start a Transaction" from the drop down. This will take you to a new screen.

HOME 1 FILING & SERVICE ALERTS SEARCH

2 Start A Transaction

► Quick Start

Saved Transactions

State Scheduled Transactions

Court

CaseNumber OR CaseName

File/Serve Case Search Set Track Case

3. Under the blue “Select Court and/or Case for Filing” banner, select the “File a New Case” button.
4. Select “CA Superior Court County of San Francisco- Civil” from the dropdown.
5. Click the “Find” button.

Select Court and/or Case for Filing

File and/or Serve in an Existing Case
 3 File a New Case

To narrow the list below, select a court and/or enter the county and click **Find**.

4 **Court:**

5

6. Click the small blue icon with a white arrow in it below “Court List”.

6 Click beside a court to select the court for your case.

Court List 1 through 4 of 4 Show results per page

▲ Court Name	Case Class
CA Superior Court County of San Francisco-Civil	Family Law

7. Select the Case Type, “Civil Action” from the drop down.
8. Enter a “Case Name” in the text box.
9. Click the “Submit” button. This will take you to the documents tab.

Add New Case

Enter a case name and select a case type. Then click **Submit**.

Court CA Superior Court County of San Francisco-Civil

Case Class
Family Law

Case Type

7

Case Name *

8

The Case Name field is required.
Maximum length of text is 200 characters

9

STEP 3 - How to Attach Documents to Your Filing

1. Under Category, select “New Case Filings” from the drop down.
2. Select your document Type.
3. Enter a “Title” for the document.
4. Click the gray box labeled, “Choose a file” to open your computer’s hard drive. Find your document and double-click on it to select the document.
5. Select Access type “Public”. (Note: If you select “request to Waive Fees”, you must select access type “Sealed”).
6. Click the “Attach Document” button.
7. To attach additional documents complete steps 1-6 again.
8. Click on “Case Parties” link on the top of the page next to “Documents” to move to the next screen.

STEP 4 - Adding Initiating Parties (i.e. Plaintiff, Petitioner, etc.)

1. Select the “Initiating Party” button.

2. Under "Party", select the Party type "Plaintiff" from the drop down.
3. Under "Entity", select the Entity type "Individual" from the drop down.
4. Enter the "Party Name" in the First, Middle, and Last Name fields.
5. Select an "Attorney" from the drop down.
6. Under "Attorney Type", select "Attorney in Charge" from the drop down.
7. Click the "Save Party" button.
8. You may add as many initiating parties as you would like by repeating steps 1-7.
9. Remain on this screen and move to step 5.

The screenshot shows a form for adding a party. It includes a 'Party*' dropdown menu with a callout '2', an 'Entity*' dropdown menu with 'Individual' selected and a callout '3', and a 'Party Name*' section with four input fields: 'First Name', 'Middle Name', 'Last Name', and 'Suffix', with a callout '4'. Below these are 'Attorney*' and 'Attorney Type*' dropdown menus with callouts '5' and '6' respectively. At the bottom are 'Save Party' and '?' buttons with a callout '7'.

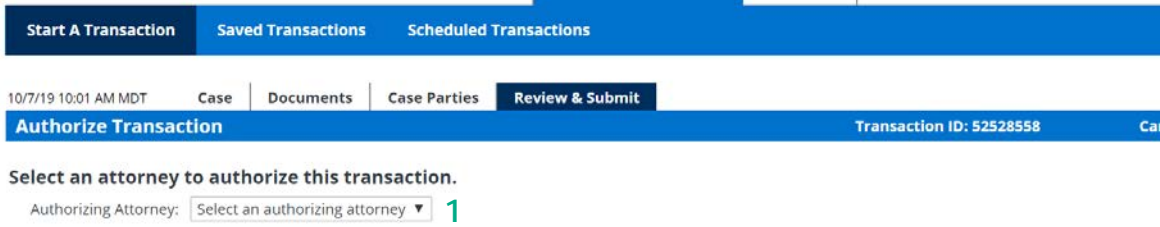
STEP 5 - Adding Additional Parties (i.e. Defendant, Respondent, etc.)

1. Select the "Additional Party" button.
2. Under "Party", select the Party type "Defendant" from the drop down.
3. Under "Entity", select "Individual" from the drop down.
4. Enter the "Party Name" in the First, Middle, and Last Name fields.
5. Click the "Save Party" button.
6. You may add as many additional parties as you would like by repeating steps 1-5.
7. Click "Review & Submit" to move to the next screen.

The screenshot shows the 'Case Parties' screen. At the top, there are tabs for 'Case', 'Documents', 'Case Parties', and 'Review & Submit'. Below the tabs, there are instructions: 'Enter or select information for each party you want to add to this case. Then click Save Party. To edit a party, select the party from the Party List.' There are two radio buttons: 'Initiating Party (e.g. plaintiff, petitioner)' and 'Additional Party (e.g. defendant, respondent)', with the second one selected and a callout '1'. Below this is the 'Party*' dropdown menu with 'Defendant' selected and a callout '2', and the 'Entity*' dropdown menu with 'Organization' selected and a callout '3'. The 'Party Name*' section has an 'Organization Name' input field with a callout '4'. At the bottom are 'Save Party' and '?' buttons with a callout '5'.

STEP 6 - How to Review & Submit Your Filing

1. Select an “Authorizing Attorney”.



2. Scroll to the bottom of the page and select the “Authorize and file now” button.
3. Click the “Next” button to move to the next screen.

Choose to submit transaction now, or schedule the transaction for later release.

2 Authorize and file now
 Authorize and file on
 / / at : AM (mm/dd/yyyy) at (hh:mm) MT

IMPORTANT:Your transaction has not yet been submitted. You will next be asked to review and submit your transaction.

3 [Next](#)

4. Scroll down the page to review your filing. Once you have reviewed your information, click the “Submit Transaction” button to complete your filing.

