

The background of the slide features a photograph of the U.S. Capitol building. The image shows the lower portion of the dome and a series of classical columns supporting the structure. The architecture is white and highly detailed with carvings and statues. The image is partially obscured by a blue banner on the left side.

CaseFile*Xpress*®

New Single Case Initiation and Filing Into an Existing Case

Landlord Tenant and Small Claims Cases
Washington, D.C. Superior Court



CaseFile*Xpress*

Tips & Guidelines

TIPS & GUIDELINES (1 of 3)

- Login page located at <https://dc.casefilexpress.com/Login.aspx>
- Know your User-ID and Password – They are case sensitive
- The application is best viewed on Chrome, Firefox, and IE 11 (not IE Edge). Performance of the application cannot be guaranteed with other browsers and operating systems, such as Macintosh Safari
- To access filing information prior to June 2nd, 2012, contact the court
- Monitor your courtesy email notifications, as well as your dashboard daily for filing alerts or eservice received
- If needed, filing delegates can be added/removed by your Firm Admin., the Manage Delegates link on Dashboard, or CaseFileXpress Client Support

TIPS & GUIDELINES (2 of 3)

- The document type list and associated fees are provided/controlled by the clerk's office
- Select the correct document type from drop-down menu **for the lead document only**
- Do not select document types for any **supporting documents**
- Save and title your documents reflecting the content of the document (i.e. Motion, Petition, Response, Reply, Answer to Complaint) as the file names are displayed after uploading
- Know your case number – it must be entered in an exact format. Check your case number on the court's website: <https://www.dccourts.gov/cco/>

(**example:** 2012 LTB 001234)

TIPS & GUIDELINES (3 of 3)

- Payment is not processed for rejected filings, **but they are not docketed**
- If a filing is 25 pages or more, then a courtesy paper copy shall be submitted to the Judicial Officer presiding over the case
- Social Security and Financial Account Numbers shall be redacted by the filer from filings submitted and, if such numbers are needed, then only the last four digits shall be used unless the document is filed under seal
- If the clerk rejects your filing, please correct based on the clerk's comments and resubmit immediately
- **For filing into existing cases**, review and confirm your service list is complete to include the Judge on the case. To add a judge to the service list, click the Add Attorneys and Judges link on the Filing Information page, then search for the judge using first name **Clerk of the**, then enter last name as **Court LTB Judge** for landlord tenant and **Court SCB Judge** for Small Claims
- The service list is created by our users - always confirm it is correct before submitting your filing

- Self-represented parties are able, but not required, to use CaseFileXpress to file and serve
- Effective August 13 parties were able to file electronically into their Landlord Tenant and Small Claims cases. Beginning October 14 electronic filing into these cases will be mandatory.
- All attorneys practicing in Landlord Tenant and Small Claims and Conciliation shall register with CaseFileXpress, whether or not they choose to batch eFile during the “permissive” period, so they may receive court orders and service of filings by other attorneys who do file during the period
- The Court will enforce all requirements contained in Super. Ct. Civ. R. 10-I. A pleading not in full compliance with the Rule will not be accepted
- The Court will enforce the verification requirement in DC Code §16-1501 (L&T) and DC Code §16-3902 (SCB). A complaint or statement of claim not verified under oath will not be accepted

- All complaints, statements of claim, motions and applications requiring a hearing must be submitted on the court's forms
- For Landlord Tenant cases, it is the responsibility of the filer to submit, along with the complaint, the appropriate number of summonses, prepared by the filer, for each defendant. All fields must be filled in except the date and case number.
- For Small Claims cases it is the responsibility of the filer to indicate the requested method of service on the information sheet submitted with the claim. An application for approval of a special process server may be submitted with the statement of claim or as a subsequent filing.
- Complaints/Statements of Claim accompanied by application for *In Forma Pauperis* or pre-payment of costs waived may not be filed electronically and must be filed on paper with the clerk
- Personal identifiers shall be redacted based on Super. Ct. Civ. R. 5.2



Filing a New Case

1. The Filing Information Tab

1. Filing Information

2. Upload Documents

3. Services & Fees

Confirm & Submit

- Choose Landlord Tenant or Small Claims for Court Assignment
- Select “**Yes**” File a New Complaint.
- Enter Case Title (200 character limit)
Note: This is not transmitted to the court and is only for CaseFileXpress display purposes so does not need to be official and can be a shortened version.
- Enter a client matter number in the box provided. This is a mandatory field

* Court Assignment: - Select Court Assignment -

* New Complaint/Petition: ☐ Yes ☒ No

* Case Number: - Enter Case/Cause Number -

* Case Title/Style: - Enter Case Title/Style -

* Client Matter: - Enter Client Matter -

- Select Court Assignment -

- Civil Actions
- Tax Division
- Domestic Relations
- Abuse & Neglect
- Juvenile- DEL
- Juvenile- ISC
- Juvenile- PINS
- Juvenile- FSP
- Juvenile- TRC
- Termination of Parental Rights
- Probate Division
- Mental Health – MHE
- Mental Rehabilitation – MRE/MRV
- Paternity & Support
- Criminal Cases
- Landlord Tenant
- Small Claims

* New Complaint/Petition: ☒ Yes ☐ No

* Case Title/Style: Smith v District of Columbia

* Client Matter: 1234

The Filing Information Tab, cont'd

- Note that the Filing Attorney is automatically added to the service list
- Before clicking on the **Add Case Parties** link, select the “role” for the Filing Attorney, typically “Plaintiff”.
- Under “Service List” – Click **Add Case Parties**.

Service List

Last Name	First Name	Organization	Bar Number	Email	* Role	* Service
Attorney	Alice	Bronze Law Firm	9999999	dgrammier@fileandserve.com	- Select -	None

Case Parties ?

* +Add Case Parties

Name/Organization	Role	Representing Attorney
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The Filing Information Tab, cont'd

- You must add **at least one** Plaintiff and one Defendant
- Select a Role for each party entered
- Enter EITHER Person or Organization information (NOT both) along with an address for each
- Click Add to build your list. Parties added will be listed under Added Names
- Add additional parties, when done adding click the Done button

To add a party to a case, enter either their First and Last Name or Organization Name, and the party's address, then click Add.

*Role - Select Role - ▼	Prefix - Select Prefix - ▼	*Last Name <input type="text"/>	*First Name <input type="text"/>	Suffix - Select Suffix - ▼	Date of Birth <input type="text"/>	OR	*Organization <input type="text"/>
*Address <input type="text"/>	*City <input type="text"/>	*Country United States ▼	*State - Select State - ▼	*Zip / Postal Code <input type="text"/>			<input type="button" value="Add"/>

The Filing Information Tab cont'd

Add Case Parties

To add a party to a case, enter either their First and Last Name or Organization Name, and the party's address, then click Add.

*Role - Select Role -	Prefix - Select Prefix -	*Last Name <input type="text"/>	*First Name <input type="text"/>	Suffix - Select Suffix -	Date of Birth <input type="text"/>	OR	*Organization <input type="text"/>	
*Address <input type="text"/>	*City <input type="text"/>	*Country United States	*State - Select State -	*Zip / Postal Code <input type="text"/>				<input type="button" value="Add"/>

Added Names (2)


	Role	Name/Organization	Representing Attorney	
+Edit	Plaintiff	Smith Properties	Alice Attorney	
+Edit	Defendant	John Doe	None/Unknown	

After adding the parties, click **Done** to return to the Service List, which will now display the parties you have added. Click **Next >** at the bottom right of the screen to proceed.

2. The Upload Documents Tab

1. Filing Information	2. Upload Documents	3. Services & Fees	Confirm & Submit
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- For Small Claims cases only, please select **Case Type** from the dropdown menu




Case Type:

Document Type:

Select a file to upload:

- Click **Document Type** – Select ONCE, for your “lead” document only




Case Type:

Document Type:

Select a file to upload:

- Click “**Select a File to Upload**” to open your computer to find the document



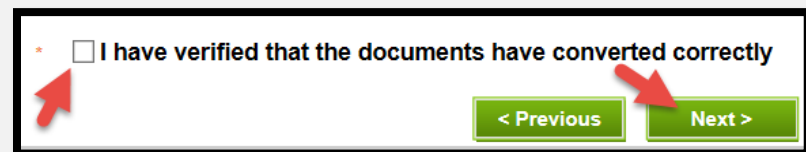
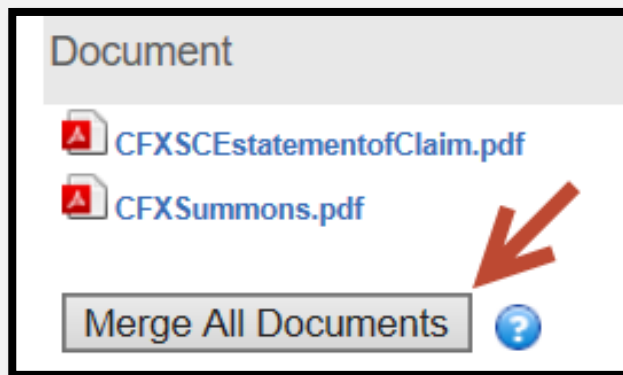
Case Type:

Document Type:

Select a file to upload:

The Upload Documents Tab cont'd

- Double click on the file name to select it for uploading, then click Upload. Non-PDF files will be converted to PDF format, and the file will appear on the screen, listed under “Document”.
- Since only one file can be sent to the court, click “**Merge All Documents**” to combine multiple documents into one file. To confirm that they have merged, right click on the remaining file name, then click Open to view. You must click the “I have verified...” box before proceeding, click Next to move to the next Tab..



3. The Services and Fees Tab



- Verify that the fees are accurate. Fee amount will depend on the document type you selected for the lead document so to change the fee you must change the document type by returning to the previous step. This screen will itemize the court fees, the CaseFileXpress fee, taxes and credit card processing fees. Click Confirm to proceed.

Filing Fees ←	
Jurisdiction:	D.C. Superior Court
Court Assignment:	Small Claims
Document Type:	EStatement of Claim - \$.01 - \$500 - (2) Certified Mails
CaseFileXpress Fees: ←	
eFiling Fees	\$5.00
Subtotal	\$23.48
(Includes NIC Processing) Total: \$25.07	

4. The Confirm and Submit Tab

- Check your work on the summary page on the Confirm and Submit tab. Add a note or instructions to the clerk in the box provided if needed.

Please enter **ONLY** the following acceptable characters: AaZz1234567890_-. "&I#\$\$%^*~;:

- Choose your payment option from the drop down menu.
- Enter credit card information in the box which appears.
- After entering payment information, click Done

Payment Information

* Select Payment Option:

Payment Information

Enter credit card information below

* Name:

* Address:

* City:

* State:

* Zip:

* Credit Card Type:

* Credit Card Number:

* Expiration Date:

The Confirm and Submit Tab cont'd

- A Filing Summary Screen will be displayed after your filing is submitted. Notice that a Trace Number is shown, which will allow you to identify each filing after submitting to the court.

Filing Summary

The filing has been successfully received by CaseFileXpress. Below are the details.

Trace Number:	ED301J000033866
Case Number:	Case Number Pending
Document Type:	EStatement of Claim - \$.01 - \$500 - (2) Certified Mails
Lead Document:	CFXSCEstatementofClaim.pdf
Filer Name:	Alice Attorney
AttorneyOfRecord Name:	Alice Attorney
Plaintiffs:	Smith Properties
Plaintiffs Attorneys:	Alice Attorney
Defendants:	John Doe
Defendants Attorneys:	
Judges:	Calendar Assignment Pending
Court Reporters:	
Others:	
Total fees:	\$25.07

Print **OK**



Submitting a Filing

Into an existing case

1. The Filing Information Tab

1.Filing Information

2.Upload Documents

3.Services & Fees

Confirm & Submit

- Confirm the Filing Attorney name
- Select Small Claims or Landlord and Tenant in the Court Assignment box
- Enter a valid case number, making sure to use the proper format
- Press your Tab key to retrieve the Case name, which will be displayed in the Case Title/Style box
- Enter Client Matter information in the box shown

Submit New Filing

1.Filing Information 2.Upload Documents

1.Enter Filing Information

Please select the Filing Type and enter the required Filing Details. Create yo

Filing Type ?

☒ eFile and eServe ☐ Discovery Service

Filing Details ?

* Filing Attorney:

* Jurisdiction:

* Court Assignment:

* New Complaint/Petition: ☐ Yes ☒ No

* Case Number

* Case Title/Style:

* Client Matter:

Use Promocode: ☐ Yes ☒ No

The Filing Information Tab, cont'd

Create Service List 

* Add Attorneys & Judges

Last Name	First Name	Organization	Bar Number	Email	* Role	* Service	
Rogers	Jack	DavidGrammier	9999999	dgrammier@fileandserve.com	- Select - ▼	None ▼	
Guruswamy	Jasmine	DavidGrammier	9999999	kguruswamy@fileandserve.com	Plaintiff Attorney ▼	eServe ▼	
Wheatley	Lucy	Crowell & Moring	991564	jryan@mmcgrp.com	Defendant Attorney ▼	eServe ▼	
Wright	Judge	Washington DC Superior Court	365896	jryan@mmcgrp.com	Judge ▼	eServe ▼	

Update Service List 

Next >

- Review the Service List and confirm that it is complete. The Service List is created and controlled by the filers and must include the “generic” presiding judge.
- The Filing Attorney will be the first name on the list. Make sure to confirm the Role assigned to the attorney.
- Confirm that the Role for each party is accurate and correct if not. Use the Service column to designate Parties to be served with your filing.
- To add Attorneys and/or judges, click the link shown above the list. See next page
- To update a service list without filing, click Update Service list after making changes.

The Filing Information Tab, cont'd

To locate a name, you can search by Last Name, First Name, Organization or Bar Number.

Last Name	First Name	Organization	Bar Number	
smith				Search

Select	Last Name	First Name	Organization	Email	Bar Number
+Add	Smith	Robin	Gershon, Willoughby, Getz & Smith	jryan@mmcgrp.com	438980
Added	Smith	Patricia	Law Offices of Patricia A Smith	jryan@mmcgrp.com	411977

Added Names

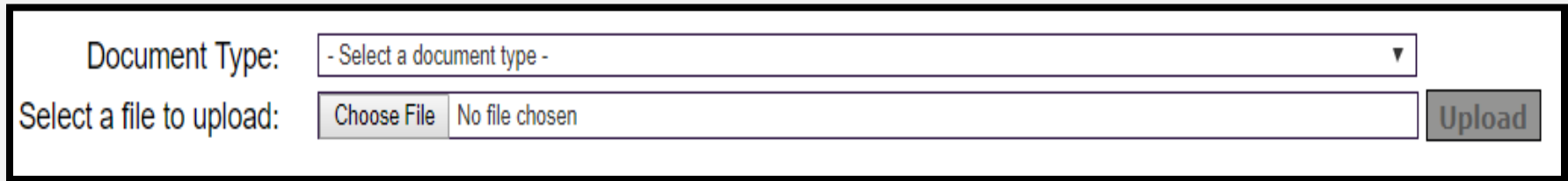
+Remove	Smith	Patricia	Law Offices of Patricia A Smith	jryan@mmcgrp.com	411977
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- Enter search criteria into one or more of the boxes shown, then click Search
- Click Add next to the name to add, which will then be shown under Added Names
- Click Done to return to the edited Service List
- Select a “Role” for anyone you add to the Service List once you return to the list
- **Review and confirm your service list is complete to include the Judge.** To add a judge to the service list, click the Add Attorneys and Judges link on the Filing Information page, then search for the judge using first name **Clerk of the**, then enter last name as **Court LTB Judge** for landlord tenant and **Court SCB Judge** for Small Claims
- After adding to the service list and assigning a Role to each person added, click Next to proceed

2. The Upload Documents Tab



1. Filing Information 2. Upload Documents 3. Services & Fees Confirm & Submit



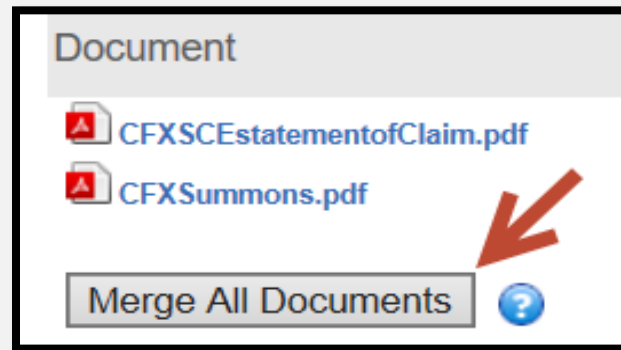
Document Type: - Select a document type - ▼

Select a file to upload: Choose File No file chosen Upload

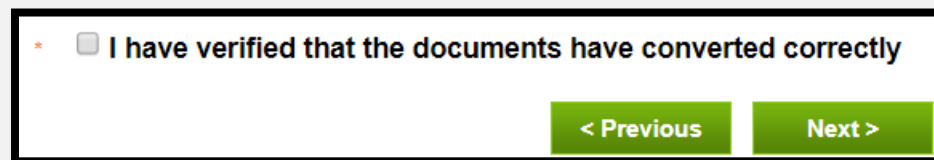
- Select the Document Type from the pulldown menu for your Lead Document
- Click Choose File to open your computer. Find the file to upload and double-click on the file name.
- Click Upload. If the file is not in PDF format it will be converted.
- To upload supporting documents, start at the Choose File step, above. Do not select Document Type for supporting documents.

2. The Upload Documents Tab, cont'd

- Since only one file can be sent to the court, click “**Merge All Documents**” to combine multiple documents into one file.



- After merging all documents, the merged file will carry the name of the first document uploaded
- To rename the file, click the “Rename” link shown above



- To confirm that they have merged, right click on the remaining file name, then click Open to view. You must click the “I have verified...” box before proceeding,
- click Next to move to the next Tab..

3. The Services and Fees Tab

1.Filing Information	2.Upload Documents	3.Services & Fees	Confirm & Submit
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Filing Fees

Jurisdiction: D.C. Superior Court
Court Assignment: Small Claims
Document Type: Motion for Summary Judgment Filed \$10.00

CaseFileXpress Fees:

eFiling Fees	\$5.00
Subtotal	\$15.00

(Includes NIC Processing) **Total:** **\$16.38**

- The Services and Fees tab itemizes your charges. Court and CaseFileXpress fees are shown, as are taxes and the credit card processing fee.

< Previous	Confirm >
------------	-----------

- To return to the Upload Documents Tab, click Previous
- To proceed, click Confirm

4. The Confirm and Submit Tab

1. Filing Information
2. Upload Documents
3. Services & Fees
Confirm & Submit

Confirm & Submit

Please review all of the information below. You may edit information as needed or navigate to a previous step by clicking the numbered tab. You may save this filing as a draft by clicking the Save as Draft button. Drafts are available for filing from your Dashboard. If needed, enter instructions for the court clerk in the Special Instructions window. Click Submit Filing to complete the transaction. *Required

Filing Information Edit

Case Title: Bells vs Gregor Jurisdiction: D.C. Superior Court Court Assignment: Small Claims Case Number: 2018 SC3 000190 Document Type: Motion for Summary Judgment Filed	Petitioner(s) Plaintiff(s): Plaintiff Attorney(s): Jasmine Guruswamy Defendant Attorney(s): Jack Rogers, Lucy Wheatley Judge: Judge Wright Court Reporter: Other(s): Client Matter Number: 1234
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Please enter **ONLY** the following acceptable characters: AaZz1234567890_-."&!#\$%^*~;

Special Instruction to the Clerk:

Document Information Edit

MotionforJudgment.pdf Exhibits.pdf	Lead Document Supporting Document	Motion for Summary Judgment Filed Motion for Summary Judgment Filed
---	---	---

Payment Information Edit

* Select Payment Option: - Select a payment method...

Payment Method:

Credit Card Type:

Credit Card #:

Cardholder Name:

Personal Information

Filer ID Attorney of Record: Filer Name: Law Firm/Organization: Bar Number: Filer Position: Address: Phone: Fax: Email:	jrogers Jack Rogers Jack Rogers (jrogers) DavidGrammier 9999999 Defendant Attorney 875 McKinaw St, Washington , DC , 20005 (777) 777-7777 dgrammier@fileandserve.com
--	--

Cancel
Save as Draft
Submit Filing

- The Confirm and Submit Tab allows you to review your work before submitting the filing
- Enter a note for the reviewing clerk if needed, e.g. preferred hearing days of the week
- Enter your payment information after clicking the box shown
- Click Submit Filing when ready to send the filing to the court and serve parties designated for service. A confirmation screen will appear and a confirmation email will follow
- Click Save as Draft to save your work to your dashboard without filing or serving

Email Notifications

- An **Acknowledgment** email (shown at right) will confirm that your filing has been submitted to the court
- Your **Confirmation** email, sent after the clerk reviews your filing, will also show the case number, judge assignment, and review status (accepted or rejected).
- The **Trace number** is used for tracking your filing and for future reference.

ACKNOWLEDGMENT OF eFILING	
<p>This email acknowledges that the filing information has been received and will be transmitted to the court.</p> <p>Please do not reply to this email.</p>	
Case Number:	
Filing Attorney:	Milt Stafford
Status:	ACKNOWLEDGEMENT (filing information has been received and will be transmitted to the court)
Date of Status:	Thursday, May 17, 2018 2:34:16 PM (Eastern (U.S. and Canada))
Court Assignment:	Small Claims
New Complaint:	No
Jurisdiction:	D.C. Superior Court
Filing Trace Number:	ED301J000043919
PAYMENT INFORMATION	
Payment Method:	Visa
Amount:	\$88.12
<p>Thank you for eFiling with CaseFileXpress!</p> <p>Access documents and details about this filing or eService by clicking the 'login' button above.</p>	
<p>Right-click or tap and hold here to download pictures. To help protect your privacy, Outlook prevented</p>	

Viewing your Filing Details

- To access details for a filing, including a link to the document(s) click on a Trace Number under the Notifications or Cases Section on your Dashboard.

Cases Showing 1 of 1 View All Cases ?							
▼ (Case: Case Number Pending) Smith Properties v John Doe							
Document Type	Status	Action	Clerk Comments	Trace Number	Case Number	File Type	Submit Date
ⓘ EStatement of C...	Submitted			ED301J000033866	Case Number Pending	eFiling	6/18/2018 3:14:03 PM

- The Filing Details screen which follows provides detailed information about your filing, including a link to the filed document(s).

Filing Details for ED301J000033866

Submitted TimeStamp: Monday, June 18, 2018 3:14:03 PM (Eastern (U.S. and Canada))
 Status: Submitted

Fee Information

CaseFileXpress Fees	
CFX eFiling Fee	\$5.00
Court Fees	
Court Fee	\$18.48
Total: (Includes NIC Processing Fee)	\$25.07

Payment Information

Payment Method:	Credit Card
Address:	123 Fake Street Washington, DC 12345
Credit Card Type:	Visa
Credit Card Number:	XXXX-XXXX-XXXX-1111
Cardholder Name:	Jack Rogers

Filing Information

Case Title:	Smith Properties v John Doe	Judge:	Calendar Assignment Pending
Jurisdiction:	D.C. Superior Court	Petitioner(s) Plaintiff(s):	Smith Properties
Court Assignment:	Small Claims	Respondent(s)	John Doe
Cause/Case Number:	Case Number Pending	Defendant(s):	
Client Matter Number:	3456	Plaintiff Attorney(s):	Alice Attorney
Document Type:	EStatement of Claim - \$.01 - \$500 - (2) Certified Mails		

Document Information

CFXSCEstatementofClaim.pdf	Lead Document
--	---------------

Personal Information

Attorney of Record:	Alice Attorney
Bar Number:	9999999

Visit the CaseFileXpress Page

For additional information, visit our page at <https://www.fileandservexpress.com/dc/>

Client Support 888-529-7587 chat ONLINE REGISTER TRAINING LOGIN in tw f g+

File & ServeXpress™ JURISDICTIONS ABOUT US SERVICES CONTACT US

Washington D.C.

Welcome

Getting Started

Avoid Rejected Filing


Training

Court Calendar

Frequently Asked Questions

Contact Us

Need Help? Chat Online



Chat with an eFiling Expert
M-F 7:00 AM - 6:00 PM CT.

The Washington DC Superior Court Launched eFiling in Mental Health and Paternity & Support on December 14, 2015.

The Washington D.C. Superior Court now allows eFiling in existing mental health and paternity and support cases as of December 14, 2015 through CaseFileXpress, the electronic filing portal of the court. eFiling will be mandatory in these case types beginning February 14, 2016.

To learn more read the [Court's latest eFiling Order](#).

The Washington DC Superior Court Launched Case Initiation in Civil cases on May 4, 2015.

DOWNLOAD THE COURT'S ANNOUNCEMENTS:

CIVIL DIVISION

EFILING OF COMPLAINTS IN THE CIVIL DIVISION ▶

ANNOUNCEMENT: JURISDICTION LIMITS INCREASE ▶

GENERAL ▶

TAX DIVISION ▶

THANKS FOR ATTENDING!

- ☑ Toll Free – **877-433-4533** or **877-I-EFILED**
(24x7 phone support)
- ☑ LiveChat
(during business hours 8am – 6pm ET)
- ☑ Send us an email: ***info@fileandservexpress.com***
- ☑ Our Home Page: ***http://fileandservexpress.com/dc***
- ☑ Send me an email for a copy of this presentation:
Milt Stafford, mstafford@fileandserve.com

The background of the slide is a blue-tinted photograph of the United States Capitol building in Washington, D.C. The building is centered in the upper half of the image, with its iconic dome and neoclassical architecture clearly visible. In front of the building, there are trees and a statue on a pedestal. The entire scene is reflected in a body of water in the foreground, creating a symmetrical effect. The text 'CASEFILEXPRESS REGISTRATION' is overlaid in white, bold, sans-serif capital letters across the middle of the image, positioned between the building and its reflection.

CASEFILEXPRESS REGISTRATION

Registering New Users


- New users needing an ID and Password for CaseFileXpress need to click the “Register Now” link on the CaseFileXpress Login page.

<https://dc.casefilexpress.com/Login.aspx>

CaseFileXpress Login

User ID:

Password:

☐ Remember Me 

[Forgot User ID](#) | [Forgot Password](#)

[Login](#)

Not registered with CaseFileXpress?

You must register with CaseFileXpress before eFiling with the District of Columbia Superior Court and the Texas State Courts. Our website is best viewed with Internet Explorer 8+ and requires the use of cookies. If you attempt to login and are returned to the login page without seeing an error message, you need to enable cookies. For more information on enabling cookies, click here: [\(Link to enabling cookies.\)](#)

Looking for more information about CaseFileXpress?

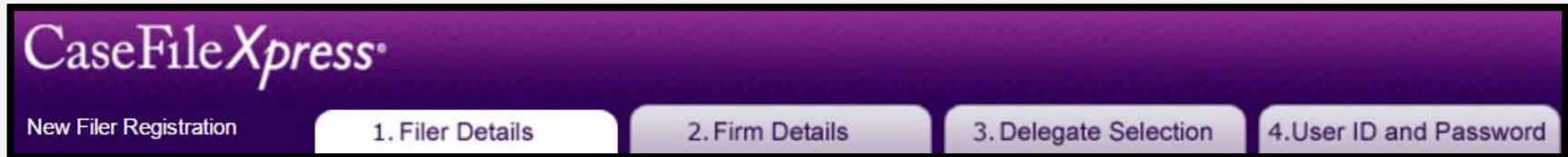
Check out the CaseFileXpress latest [Tips and Guidelines.](#)

[Register Now](#)

- After clicking on “Register Now” a series of four tabs open.

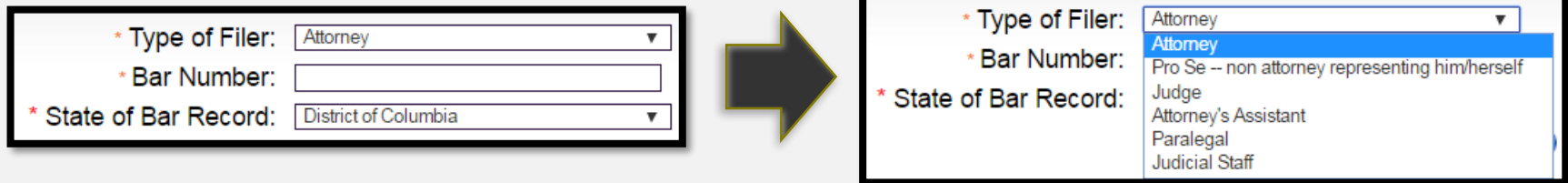
User Types

- The first tab is for **Filer Details**



The image shows the 'New Filer Registration' header with four tabs: '1. Filer Details' (active), '2. Firm Details', '3. Delegate Selection', and '4. User ID and Password'.

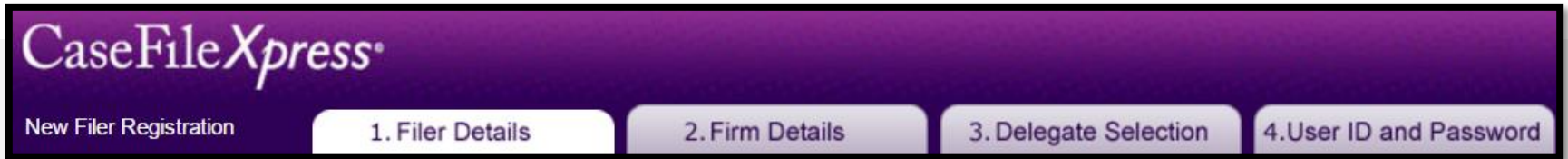
- After entering their name and email address, users will designate the type of filer they wish to register as.



The image shows a registration form with three fields: 'Type of Filer' (dropdown), 'Bar Number' (text input), and 'State of Bar Record' (dropdown). A large arrow points from the initial state to the state after the 'Type of Filer' dropdown is clicked, revealing a list of options: Attorney, Pro Se -- non attorney representing him/herself, Judge, Attorney's Assistant, Paralegal, and Judicial Staff.

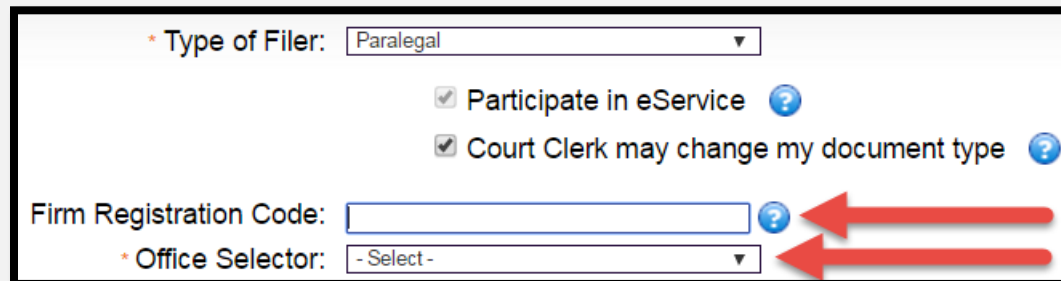
- If registering as an **Attorney**, a DC Bar Number must be entered.
- If registering as an **Attorney's Assistant** or **Paralegal**, a Bar Number is not
 - needed, but the user will need to be designated as a **Delegate** for another
 - user who is designated as an **Attorney** in order to be able to file.
- Each case will have a “Filing Attorney”. **Delegates are able to file into that case if they are designated as a Delegate for the Filing Attorney on the case.**

Firm Registration Code



The navigation bar for CaseFileXpress New Filer Registration. It features the CaseFileXpress logo on the left and four tabs: 'New Filer Registration' (active), '1. Filer Details', '2. Firm Details', '3. Delegate Selection', and '4. User ID and Password'.

- Each Organization creates a Firm Registration Code. ***It is crucial for each user in that Organization to enter the Firm Registration Code during the registration process.*** This ensures that the user will be associated with the correct Organization. Client Support can provide the Code if the new user cannot find it. Once the code is entered, press the Tab key for validation, and once validated the “Office Selector” pull down menu will appear. The appropriate office must be selected.
- If the user fails to enter the Firm Registration Code they may end up creating a *personal* account for which they will be billed accordingly.



A screenshot of the registration form. It includes a dropdown for 'Type of Filer' set to 'Paralegal', two checked checkboxes for 'Participate in eService' and 'Court Clerk may change my document type', and a text input for 'Firm Registration Code'. Below this is a dropdown for 'Office Selector' set to '- Select -'. Two red arrows point to the question mark icons next to the 'Firm Registration Code' and 'Office Selector' fields, indicating where to click for help or validation.

Firm Details

CaseFileXpress®

New Filer Registration

1. Filer Details 2. Firm Details 3. Delegate Selection 4. User ID and Password

- If the new user is registering as part of an Organization which already has an account, and if they enter the Organization's Firm Registration Code, the Firm Details tab will be skipped. If the user registering is the first to register for their Organization they will need to enter the firm details on this screen.

Firm Details

* Law Firm or Organization: ?
 Website:
☒ Manager Account?
☐ Multiple Offices? [+ Add Office ?](#)

* Practice Type: - Select -
 * Firm Registration Code:
 Managing Partner Name:
 Managing Partner Phone Number: - -
 Managing Partner Email: mstafford@fileandservexpress.com

► * Primary Office Name:
 * Address Line 1:
 Address Line 2:
 * City:
 * State: DC
 * Zip:
 * Law Firm Contact Person:
 * Law Firm Contact Person Email:
 * Law Firm Contact Number: - -
 * Law Firm Fax: - -
 * Time Zone: - Select Time Zone -

* Primary Accounting Contact: First Name Last Name
 * Contact Number: - -
 * Contact Email: mstafford@fileandservexpress.com

Secondary Accounting Contact: First Name Last Name
 Contact Number: - -
 * Contact Email: mstafford@fileandservexpress.com

* Authorizer Name: * Authorizer eMail:

Firm User Agreement ?

Firm Agreement:

Case File Xpress Firm User Agreement

By clicking "I accept" with respect to this Case File Xpress Firm User Agreement (this "Agreement") , agrees to be bound by the covenants and agreements herein, in return for be granted access the Case File Xpress ("CFX") application to utilize the eFiling and eService services available in the application. Clicking the "I accept" button is a symbol of the signature of the Firm's authorized representative accepting the terms of the Agreement.

1. Account.

(a) Firm shall have an account (the "Account") with CFX for use of the CFX website (the "Website") and CFX web-based eFiling services in accordance with the End User Agreement set forth on the website.

(b) Each attorney who is a partner, member or associated with Firm shall have an individual registration through Firm's Account (each a "Firm Attorney"). Firm shall provide for each Firm Attorney the information required by the Website for registration of such Firm Attorney. Each Firm Attorney registered with CFX through Firm must be an attorney in good standing in their respective states in which they are practicing. CFX shall promptly terminate a Firm Attorney's registration upon notice by the Firm to such effect.

(c) Firm shall be responsible for all charges incurred by any Firm Attorney (or any representative or assistant of the Firm or of any Firm Attorney) with CFX through the Website or otherwise.

(d) Firm shall notify CFX of any discrepancies or irregularities on a billing for service within ninety (90) days of the delivery of such service. If Firm does not notify CFX of a discrepancy or irregularity within such 90 day period, Firm may not challenge the validity of such

Delegate Selection

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- If the new user is registering as a non-"Attorney", they will be able to select the "Attorney(s)" they wish to be Delegates for. A list of Attorneys will appear. The new user will click on the Attorney(s) name(s) for whom they wish to be Delegates for to create/add them to a list.

Below is a list of all eligible filers from all of your defined Locations.

Search: Last Name First Name Office

Can't find who you are looking for? Enter email below to send them an invitation to register with CaseFileXpress.
Enter Email:

Available Attorneys 

Select	Name >>	Filer Type >>	Office >>
<input type="checkbox"/>	Attorney, Bob	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Attorney, Test	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Austin, Gina	Attorney	CaseFileXpress, LP

Attorneys List

Select	Name >>	Filer Type >>	Office >>
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Delegate Selection

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New Filer Registration

1. Filer Details 2. Firm Details 3. Delegate Selection 4. User ID and Password

- If the new user is registering as an "Attorney", they will be able to select the other "Attorney(s)" they wish to be Delegates for and the Delegates who will be able to file on their behalf. A list of Attorneys and a list of Delegates will appear. The new user will click on the Attorney(s) name(s) for whom they wish to be Delegates for and the Delegates who they wish to be able to file on their behalf, to create/add them to a list.

Select Firm Delegates ?

Below is a list of all eligible filers from all of your defined Locations.

Search: Last Name First Name Office

Available Attorneys ?

Select	Name >>	Filer Type >>	Office >>
<input type="checkbox"/>	Attorney, Bob	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Attorney, Test	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Austin, Gina	Attorney	CaseFileXpress, LP

Available Delegates ?

Select	Name >>	Filer Type >>	Office >>
<input type="checkbox"/>	Attorney, Bob	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Attorney, Test	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Austin, Gina	Attorney	CaseFileXpress, LP

Can't find who you are looking for? Enter email below to send them an invitation to register with CaseFileXpress.
Enter Email:

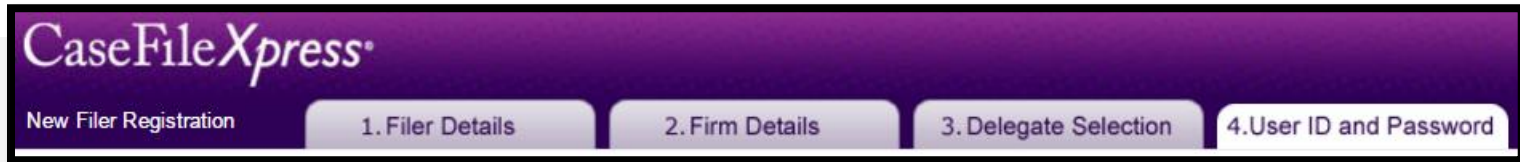
Attorneys List

Select	Name >>	Filer Type >>	Office >>
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Delegates List

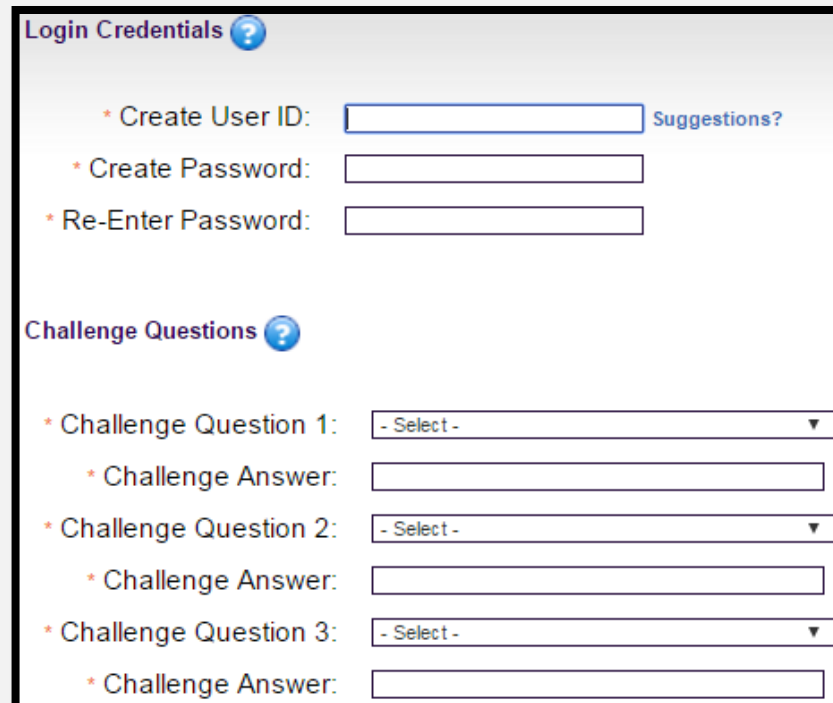
Select	Name >>	Filer Type >>	Office >>
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User ID and Password



The image shows a progress bar for the 'New Filer Registration' process. It has five steps: '1. Filer Details', '2. Firm Details', '3. Delegate Selection', and '4. User ID and Password'. The fourth step, '4. User ID and Password', is currently selected and highlighted in white, while the others are in a darker purple shade.

- Users are able to create their own User ID and Password. If uppercase letters are used they must also be entered to login. Users will also pick challenge questions to be able to retrieve their login credentials.



The image shows a form titled 'Login Credentials' with a help icon. It contains three input fields for creating a user ID and password, followed by a 'Suggestions?' link. Below this is a section titled 'Challenge Questions' with three sets of dropdown menus for selecting questions and text input fields for answers.

Login Credentials ?

* Create User ID: [Suggestions?](#)

* Create Password:

* Re-Enter Password:

Challenge Questions ?

* Challenge Question 1:

* Challenge Answer:

* Challenge Question 2:

* Challenge Answer:

* Challenge Question 3:

* Challenge Answer: