

File & Serve *Illinois*™

User Dashboard

File & Serve *Illinois*™



AGENDA

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OVERVIEW

The File & Serve *Illinois* User Guide provides a convenient source of information to help you **navigate key features** to efficiently eFile into a new or an existing case.

Before You Begin

1. Refer to the appropriate court rules on electronic filing prior to using File & Serve *Illinois* 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 *Illinois*.
3. If you need assistance, call our Client Support line at 1-888-529-7587. They are available to help you 24/7/365.

Logging in to File & Serve *Illinois*

File & Serve *Illinois*™

* Required field.

Email *

Password *

Login

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

1. Type in the URL www.fileandserveillinois.com into your browser (Chrome, Firefox, Safari, Edge).
2. Enter your Username and Password and click **Login**.
3. **If you do not have a Username/Password, please contact your Firm Administrator.**

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

- **File & Serve *Illinois* 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. They are available 24/7/365.
- **File & Serve *Illinois* Resource Center** is available to assist you with How-To Guides, register for Live Webinars, watch On-Demand videos, and much more! Please visit [Resources – File & ServeXpress \(fileandservexpress.com\)](https://fileandservexpress.com) for more information.

SUBMIT A NEW FILING

The **Case Type** tab, “+New Case” or “+Existing Case” (found on the Incomplete Filings page or the Completed Filings page) are used to submit a new case filing or file a subsequent transaction into an existing case. For more information on filing and serving documents, see our File & Serve *Illinois* user guides titled, “New Case Filing” and “Subsequent Filing”.

Case Details

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

* indicates a required field.
Please note that the context of the page and the options available to you can change based on your selections.

Is this filing for an existing case? *

Jurisdiction * Preferred list Full list

Case Category *

Case Type *

Payment Account *

Attorney

Client Matter ID *

[Next](#)



COMPLETED FILINGS, REPORTS, REJECTIONS

You will be able to view the **Transaction Summary** by clicking on the “**eyeball**” icon next to the envelope under “**Search Results.**” You will be able to print the Transaction Summary.

Completed Filings

[+ New Case](#) [+ Existing Case](#)

Please note that the context of the page and the options available to you can change based on your selections.

Report Type
Report Type

Jurisdiction
Select a Jurisdiction

From Date (mm/dd/yyyy)
mm/dd/yyyy

To Date (mm/dd/yyyy)
mm/dd/yyyy

Sort By
Sort By

Filing Type
Filing Type

Case Category
Case Category

Filing Code
Filing Code

Case Number
Case Number

Envelope ID
Envelope ID



Filing Status
Filing Status

[Go](#) [Clear All](#)

Search Results

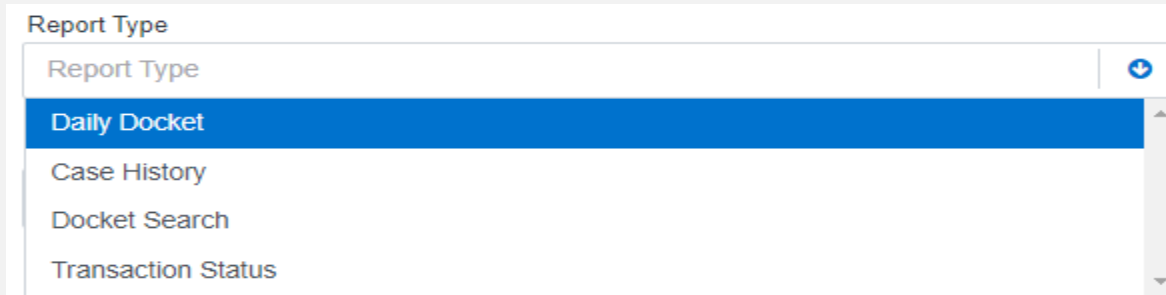
Need [process service](#), [skip trace](#) or [courtesy copies](#) ?

Show filings per page

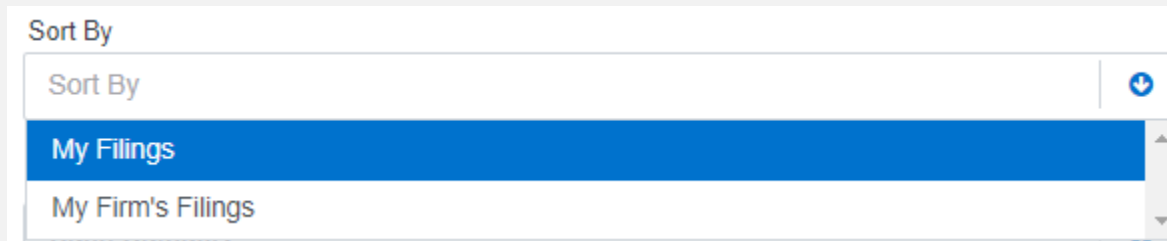
Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
246276			Cook County - Chancery - District 1 - Chicago	08/27/2021	Max FSIL19.9.1	 

COMPLETED FILINGS, REPORTS, REJECTIONS *(continued)*

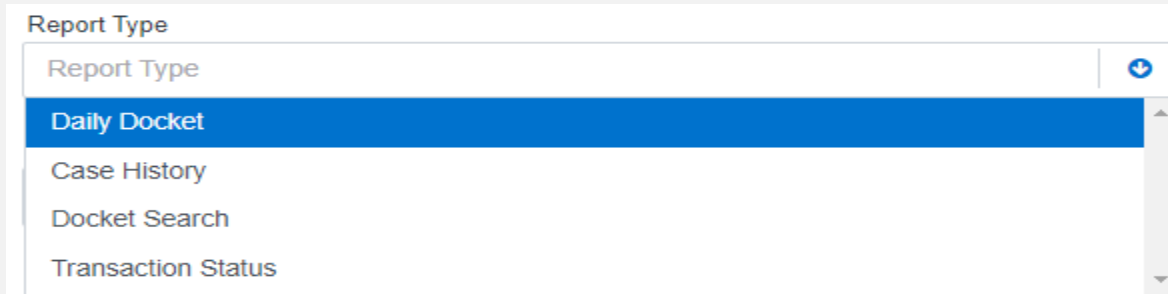
There are four **Reports** that can be performed on the Completed Filings tab:



Note: For all Reports, Firm Users can choose to access their own filings, or firm filings. To select the filings you wish to see, use the “Sort By” dropdown on the filter list.

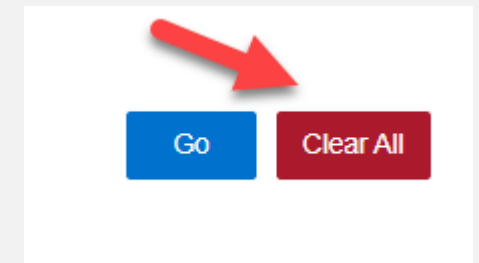


COMPLETED FILINGS, REPORTS, REJECTIONS *(continued)*



1. The **Daily Docket** report allows users to search for filings that they submitted in a specific date range. Use the dropdowns and type fields to enter your search criteria and click “Go” to run the search.
2. The **Case History** report allows users to search for filings that they submitted in a specific case. Use the dropdowns and type fields to enter your search criteria and click “Go” to run the search.
3. The **Docket Search** report allows users to search for filings that they submitted and sort them by document type (e.g., Answers). Use the dropdowns and type fields to enter your search criteria and click “Go” to run the search.
4. The **Transaction Status** report allows users to search for filings and view what Clerk Review status they are in. Use the dropdowns and type fields to enter your search criteria and click “Go” to run the search.

“Clear All” will clear the search fields.









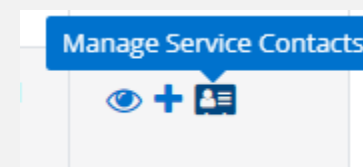
COMPLETED FILINGS, REPORTS, REJECTIONS (continued)

If you receive a “Return for Correction” or a “Rejected” notification from eFileIL, please follow these steps to upload and submit your corrected documents:

1. Log onto File & Serve Illinois and select the “Completed Filings” page from the “Filing” drop-down menu.
2. Find the transaction with the “back arrow” in red. The transaction will also have a red “x” next to the Envelope number to easily find any rejected documents.
3. Click on the back arrow to open the transaction, make the necessary corrections, and re-submit.
4. Click on the “person/paper” icon to view the Service Report. Screenshot below.
5. Click on the “person/script” icon to Manage your Service List without filing into a transaction. Screenshot below.

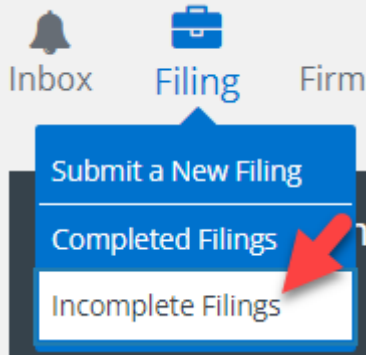
The back arrow allows you to open up the transaction & easily re-submit the corrected documents.

218177 	qq w	2020CONC00060 1	Cook County - County Division - District 1 - Chicago	08/31/2020	Max FSIL19.9.1	    
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INCOMPLETE FILINGS

1. This feature is used to search for, and view, any filings that you or your colleague/firm has not completed and that have been saved in the system. To search for a specific incomplete filing, enter your search criteria and click “Go”.
2. Click on “**edit**” icon under the Action column to complete and submit your filing.



Incomplete Filings

+ New Case + Existing Case

Sort By: Jurisdiction:

From Date (mm/dd/yyyy): To Date (mm/dd/yyyy):

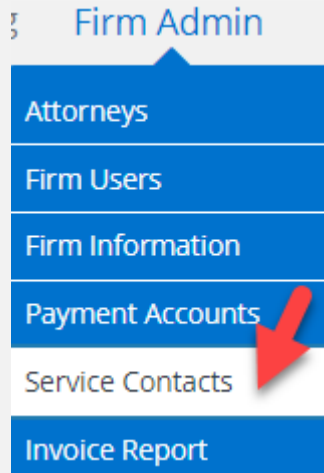
Search Results

Show filings per page

Jurisdiction	Case Name	Case Number	Created on	Created By	Action
Brown County			10/19/2021	Max FSIL19.9.1	

SERVICE CONTACTS

This feature is used to **search for, and view, service contacts that have been saved by your firm or to add new service contacts**. To search for a specific service contact, enter your search criteria and click “Search”. This will populate the screen with only the contact(s) that match your search criteria. Use the “**edit**” icon to edit the contact and use the “**Trash can**” icon to delete the contact. You can also **print and/or export the list** to your email address.



Service Contact

First Name Last Name

Email Address

[Add New Service contact](#) [Search](#)

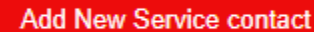
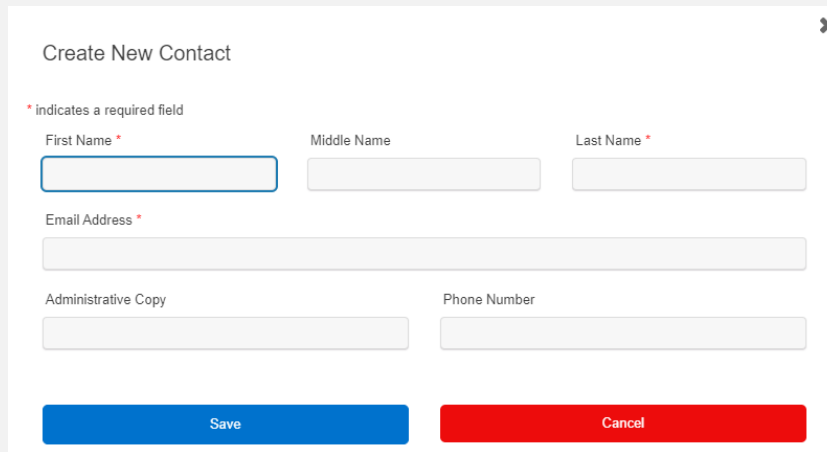
First Name	Last Name	Email Address	Action
newlyadded	0107	qaefsp+newlyadded0107@gmail.com	✎ 🗑
newlyadded0107	0107	qaefsp+newlyadded0107-12@gmail.com	✎ 🗑
newlyadded10	0107	qaefsp+newlyadded10@gmail.com	✎ 🗑
newlyadded11	0107	qaefsp+newlyadded11@gmail.com	✎ 🗑
newlyadded2	0107	qaefsp+newlyadded2-0107@gmail.com	✎ 🗑
newlyadded3	0107	qaefsp+newlyadded3-0107@gmail.com	✎ 🗑
newlyadded4	0107	qaefsp+newlyadded4@gmail.com	✎ 🗑

[Print](#) [Export](#)

SERVICE CONTACTS *(continued)*

To **Add** a service contact, follow these steps:

1. Click on the **Add New Service Contact** button:
2. This will open a new screen:

A red rectangular button with the text "Add New Service Contact" in white.A screenshot of a "Create New Contact" form. The form has a title "Create New Contact" and a close button (X) in the top right corner. Below the title, there is a note: "* indicates a required field". The form contains several input fields: "First Name *" (with a red asterisk), "Middle Name", and "Last Name *" (with a red asterisk). Below these are "Email Address *" (with a red asterisk), "Administrative Copy", and "Phone Number". At the bottom of the form, there are two buttons: a blue "Save" button and a red "Cancel" button.

3. Enter the service contact's information. Please note the **required** fields – First Name, Last Name, and Email Address.
4. If anyone in your firm needs to be copied on the service contact's service, enter one or more email addresses separated by commas (no space) in the **Administrative Copy** field.
5. Click **Save** to add the contact to your list.

This feature is used to **update your user information** in the system. To update your information, make the changes in the type fields and click **“Submit”** to save your changes

The screenshot displays the File & Serve Illinois user interface. At the top left, the logo 'File & Serve Illinois' is visible. Below it, there are navigation links for 'Inbox', 'Filing', and 'Firm Admin'. On the right side, a user profile icon is shown with the name 'Max FSIL19.9.1'. A dropdown menu is open, listing several options: 'Login to FSX', 'My Information', 'Change Password', 'Manage Notifications', 'Preferred Jurisdiction List', and 'Log Out'. A red arrow points to the 'Change Password' option. The main content area is titled 'Change Password' and contains a form with the following fields:

- * Indicates a required field.
- Old Password *
- New Password *
- Confirm New Password *
- Security Question * (with the value 'Pet' entered)
- Security Answer *

A blue 'Submit' button is located at the bottom right of the form.

CHANGE PASSWORD

This feature is used to **change your password and/or security question in the system**. To change your password and/or security question, enter the requested information in the type fields and click “**Submit**” to save your changes.

The screenshot shows the 'Change Password' form in the File & Serve Illinois system. At the top left, there are navigation links for 'Inbox', 'Filing', and 'Firm Admin'. The main heading is 'Change Password'. Below the heading, there is a note: '* indicates a required field.' The form contains five input fields: 'Old Password *', 'New Password *', 'Confirm New Password *', 'Security Question *' (with the value 'Pet' entered), and 'Security Answer *'. A blue 'Submit' button is located at the bottom right of the form. On the right side of the page, there is a user profile dropdown menu. The menu is open, showing options: 'Login to FSX', 'My Information', 'Change Password', 'Manage Notifications', 'Preferred Jurisdiction List', and 'Log Out'. A red arrow points to the 'Change Password' option in the dropdown menu. The user's name 'Max FSIL19.9.1' is visible at the top of the dropdown menu.