File & Serve California™

USER GUIDE
New Case Filing

File & Serve California™

What's Inside

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FILE & SERVE CALIFORNIA RESOURCES

File & Serve *California* (FSCA) has many resources available to you in order to address your questions and concerns:

- **FSCA Client Support** is available to assist you with technical, ID, functionality and any other questions you may have. You can contact Client Support at 888.529.7587. They are available 24/7/365.
- The **FSCA** website (www.fileandservecalifornia.com) contains helpful information for using the FSCA system. The website houses our training registration information, user guides, pricing, and more.

NEW CASE FILING OVERVIEW

This FSCA User Guide provides a convenient source of information to help you efficiently initiate a case filing.

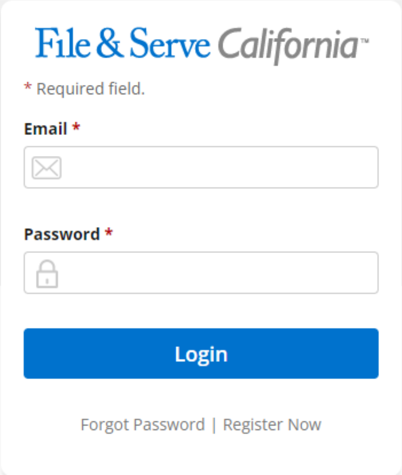
Before You Begin

1. Refer to the appropriate court rules on electronic filing prior to using FSCA to ensure that you are in compliance with local requirements.

2. Check our minimum system requirements for using FSCA.

3. If you need assistance, call our Client Support line at 1-888-247-2051. They are available to assist 24/7/365.

Logging in to FSCA



1. Open Chrome, Safari, or Firefox go to **www.fileandservecalifornia.com**

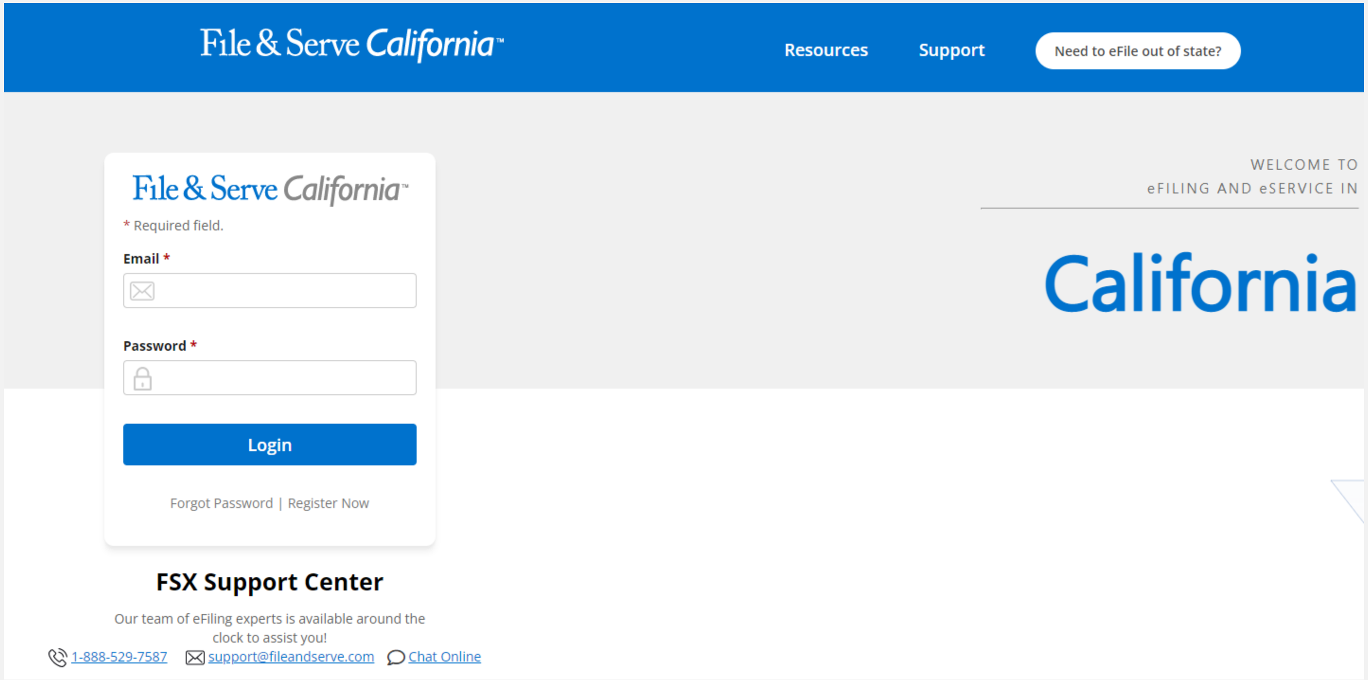
2. Enter your Username and Password and click **Login**.

3. **If you do not have a Username/Password, please contact your Firm Administrator.**

GETTING STARTED

1. Access the FSCA login page via www.fileandservecalifornia.com
2. Enter your Username/Password and click *Login*

IMPORTANT: If you have registered your email address with Odyssey eFileCA, the same username and password can be used with FSCA.



GETTING STARTED *(continued)*

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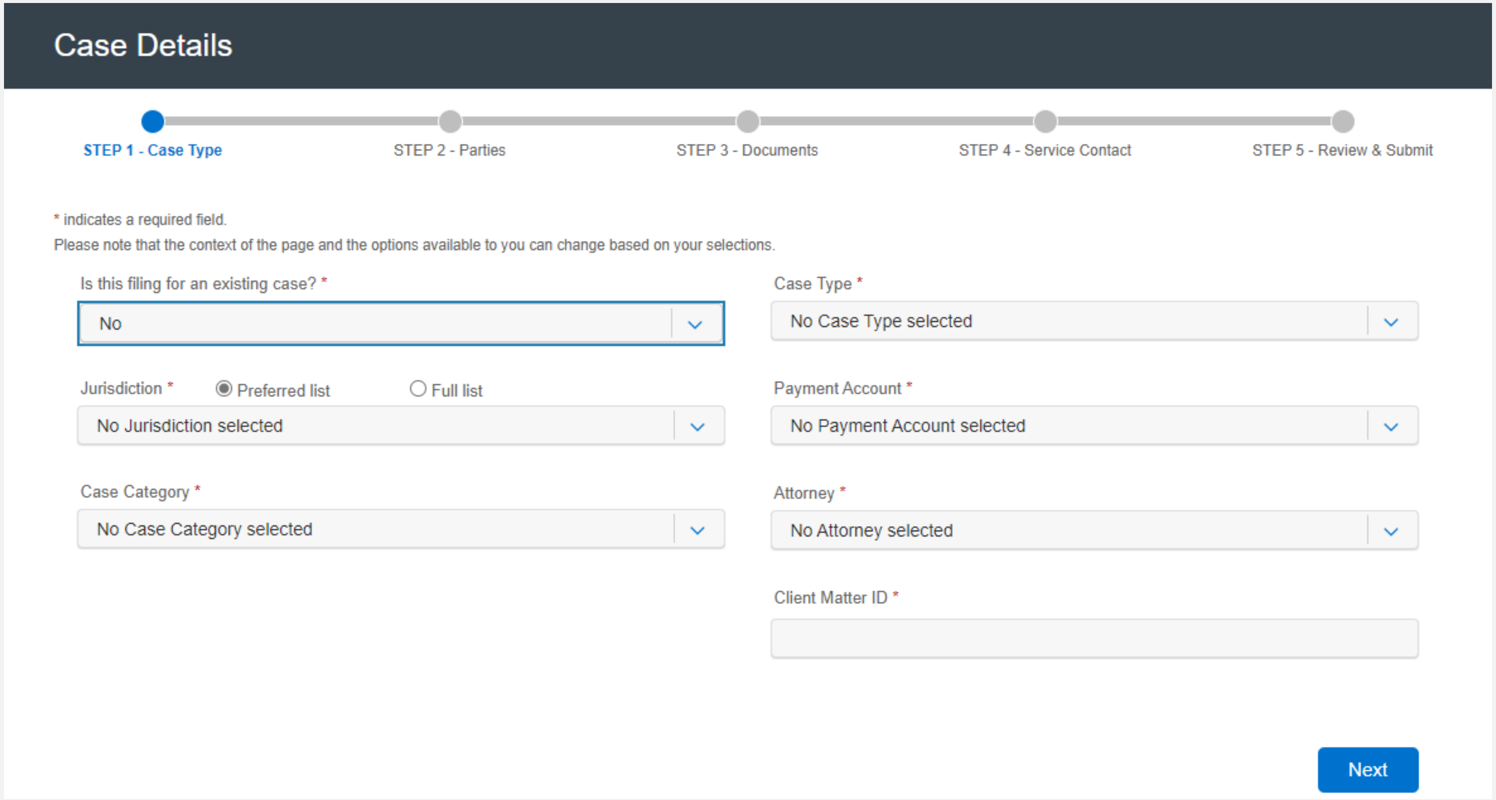
3. Once you are logged into your account, you will be taken to the *Case Details* page to begin your filing. There are five (5) steps prior to submitting to the court, or four (4) for a *File Only* transaction. The next slides will walk you through each Step.



STEP 1 – CASE TYPE

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Please refer to the next slide for a screenshot illustrating the information below.

1. Under the *Is this filing for an existing case?*, it should reflect, *No.*
2. Select the *Jurisdiction*. You can either use the drop-down menu or type into the field.
3. Select the *Case Category*, *Case Type*, and *Payment Account.*
4. Next, select the *Attorney* (e.g., the attorney who signed the document) and enter the *Client Matter ID.*
5. Click on *Next* to move to *Step 2 – Parties.*

STEP 1 – CASE TYPE *(continued)*

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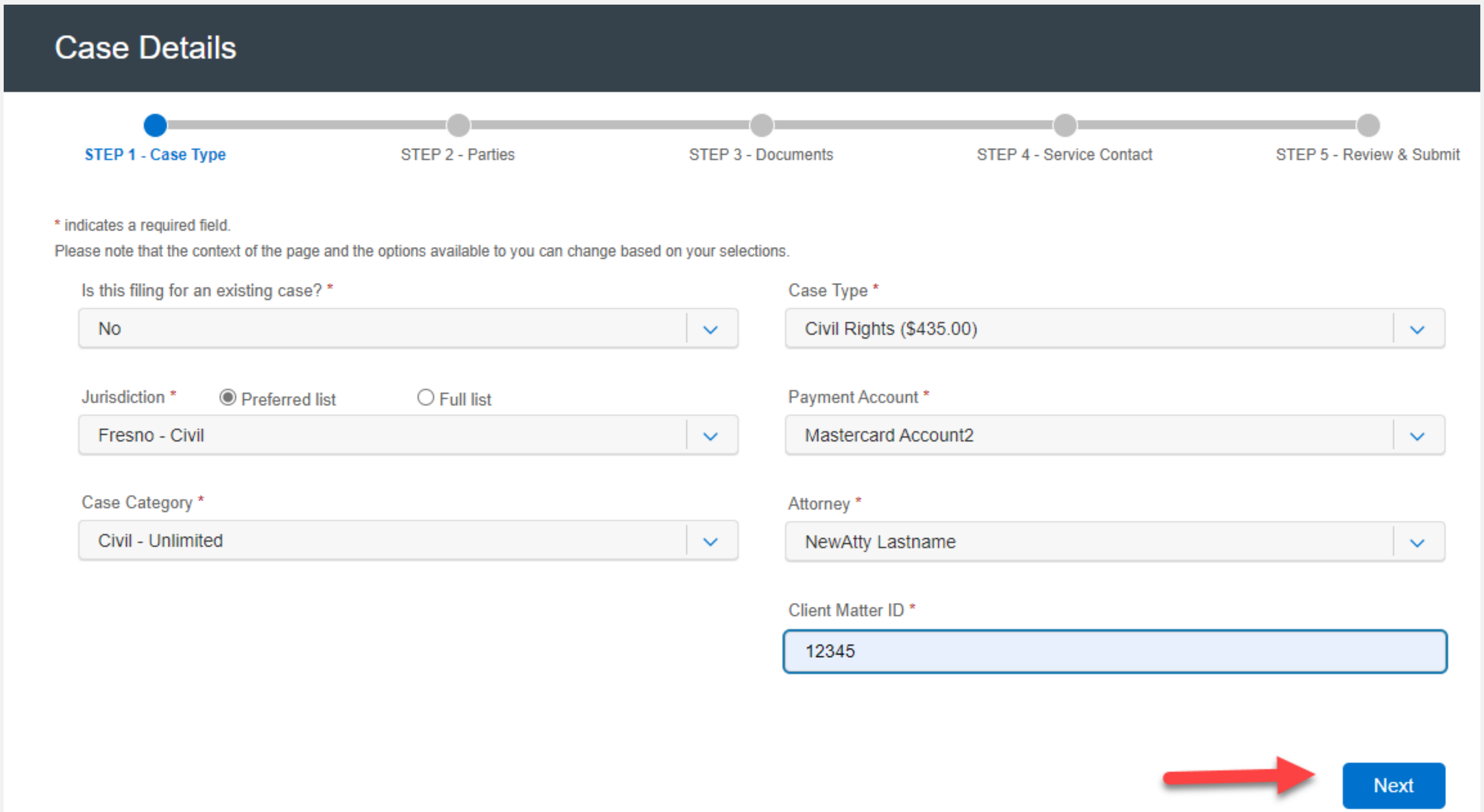

STEP 2 - PARTIES

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Please refer to the next slides for screenshots illustrating the information below.

1. You will want to enter at least one *Plaintiff* and one *Defendant*. You can add an *Additional Party* if needed for each category (Plaintiff and Defendant) until complete.
2. Make sure to select the *Sending Party*, then click *Next* to move to *Step 3 – Documents.*

STEP 2 – PARTIES *(continued)*

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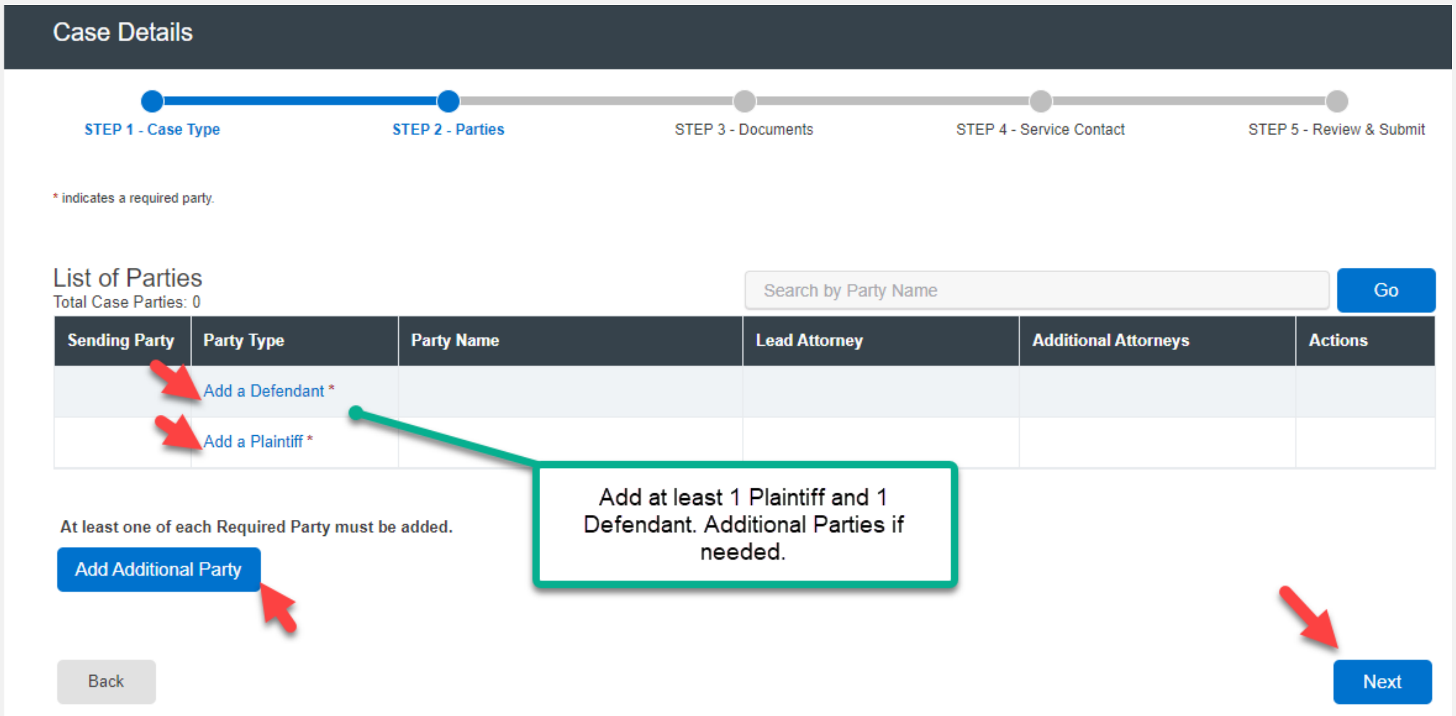

STEP 2 – PARTIES *(continued)*

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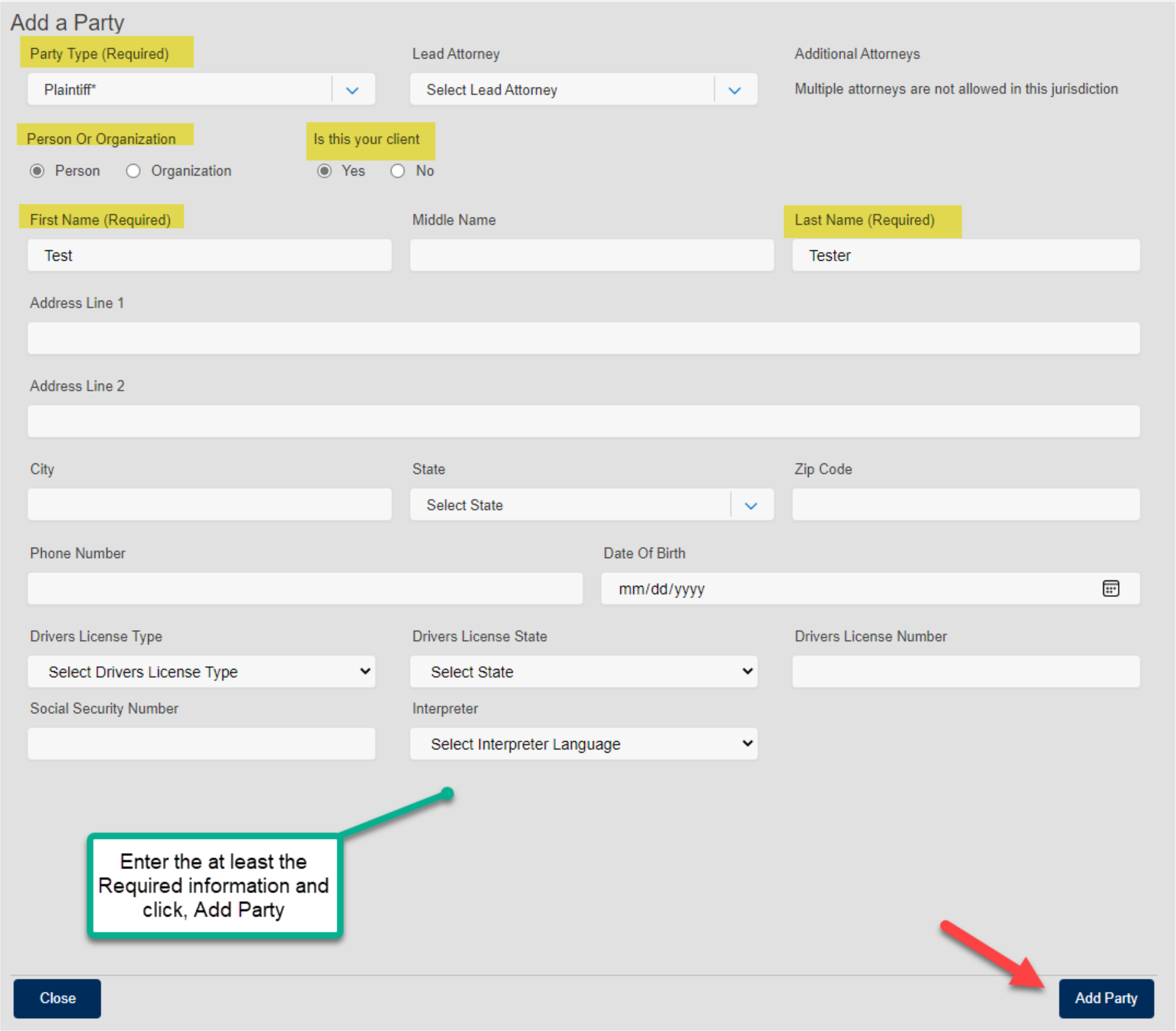

STEP 2 - PARTIES *(continued)*

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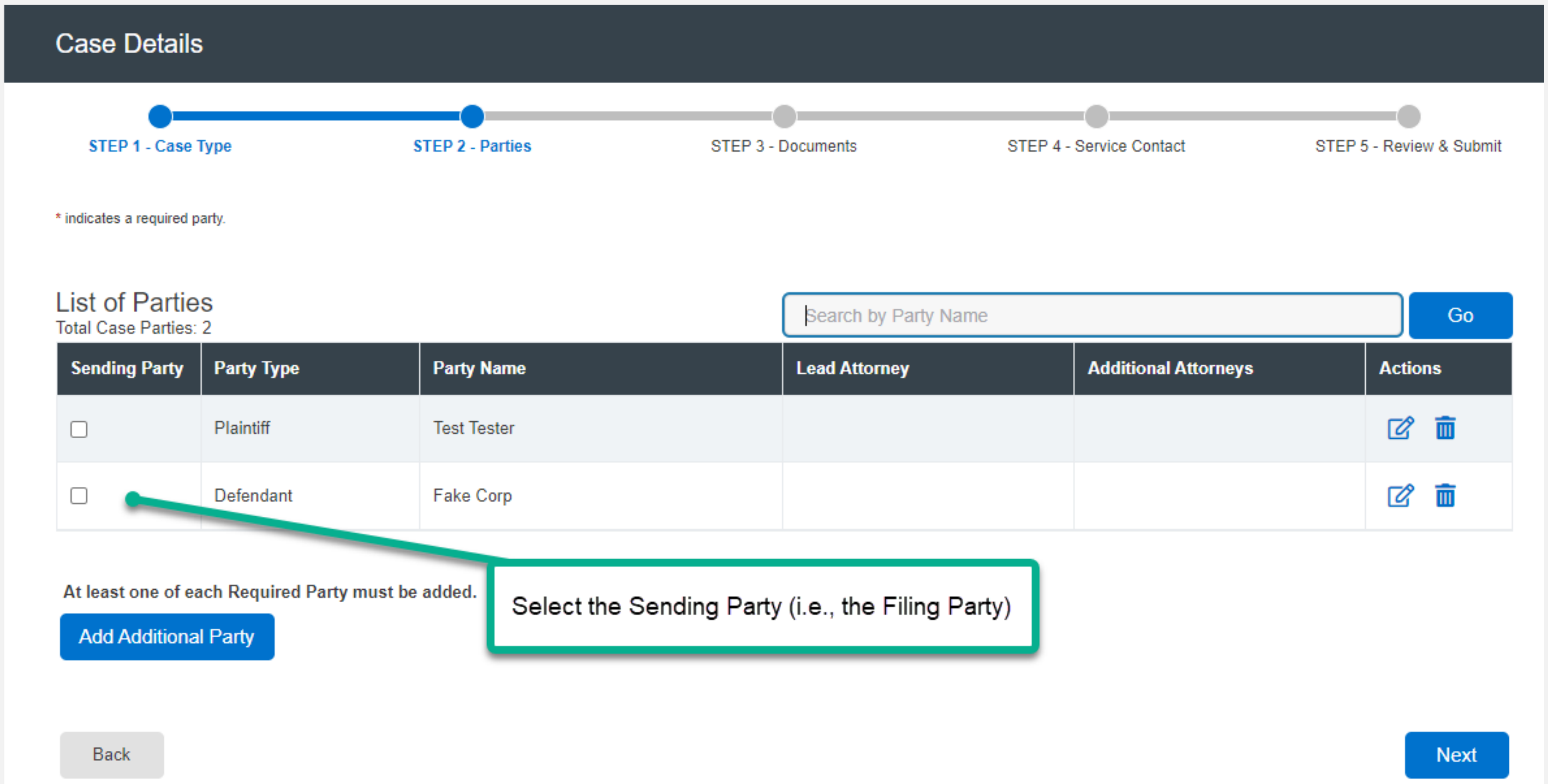
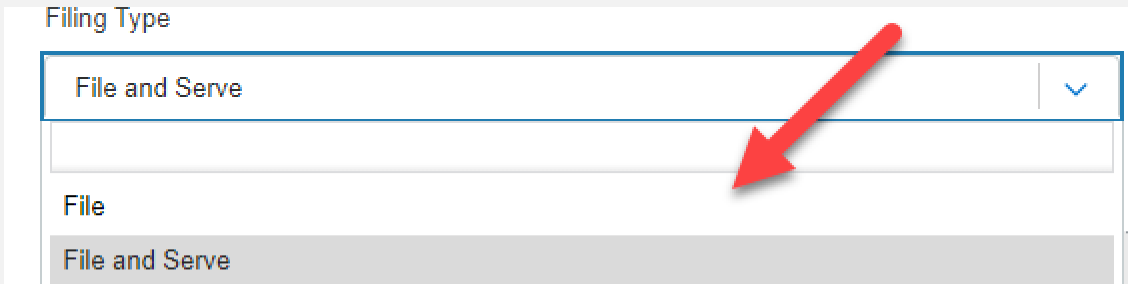


Click on *Next* to move to *Step 3-Documents*.

STEP 3 - DOCUMENTS

Please refer to the next slides for screenshots illustrating the information below.

1. Select the *Filing Type – File* or *File and Serve.*



2. Either *Choose Lead Documents* or *Drag & Drop* the documents for the filing. ***Multiple documents*** can be added at once for efficiency.
3. To make a change to any of the documents once uploaded, click on *Add/Manage Document(s).*
4. Make sure to add the party who is *Responsible for Filing Fees.*
5. If you want to send notifications of this filing, add emailing address to the *Send Accepted Notifications To* field.

STEP 3 - DOCUMENTS *(continued)*

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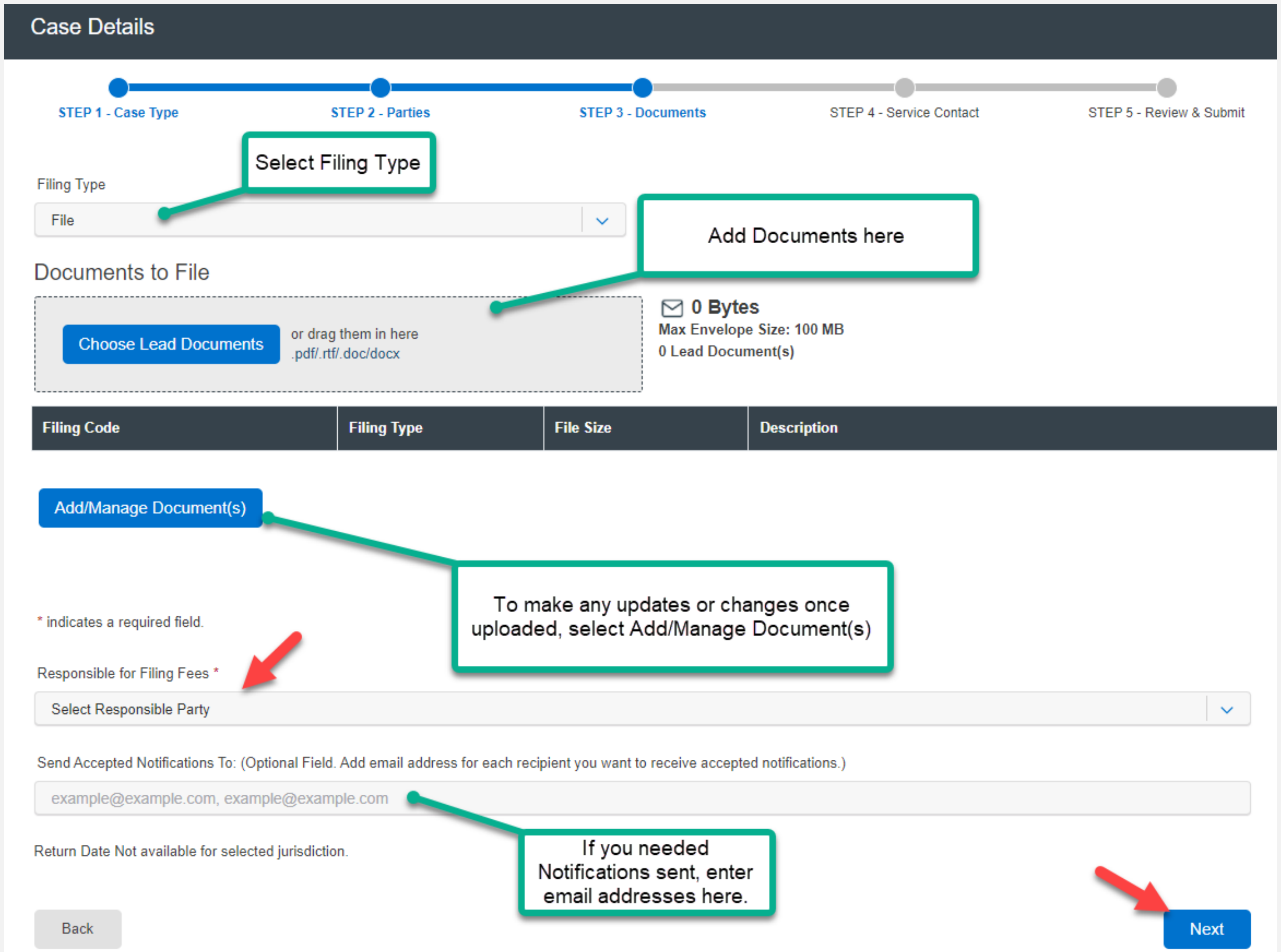

STEP 3 - DOCUMENTS *(continued)*

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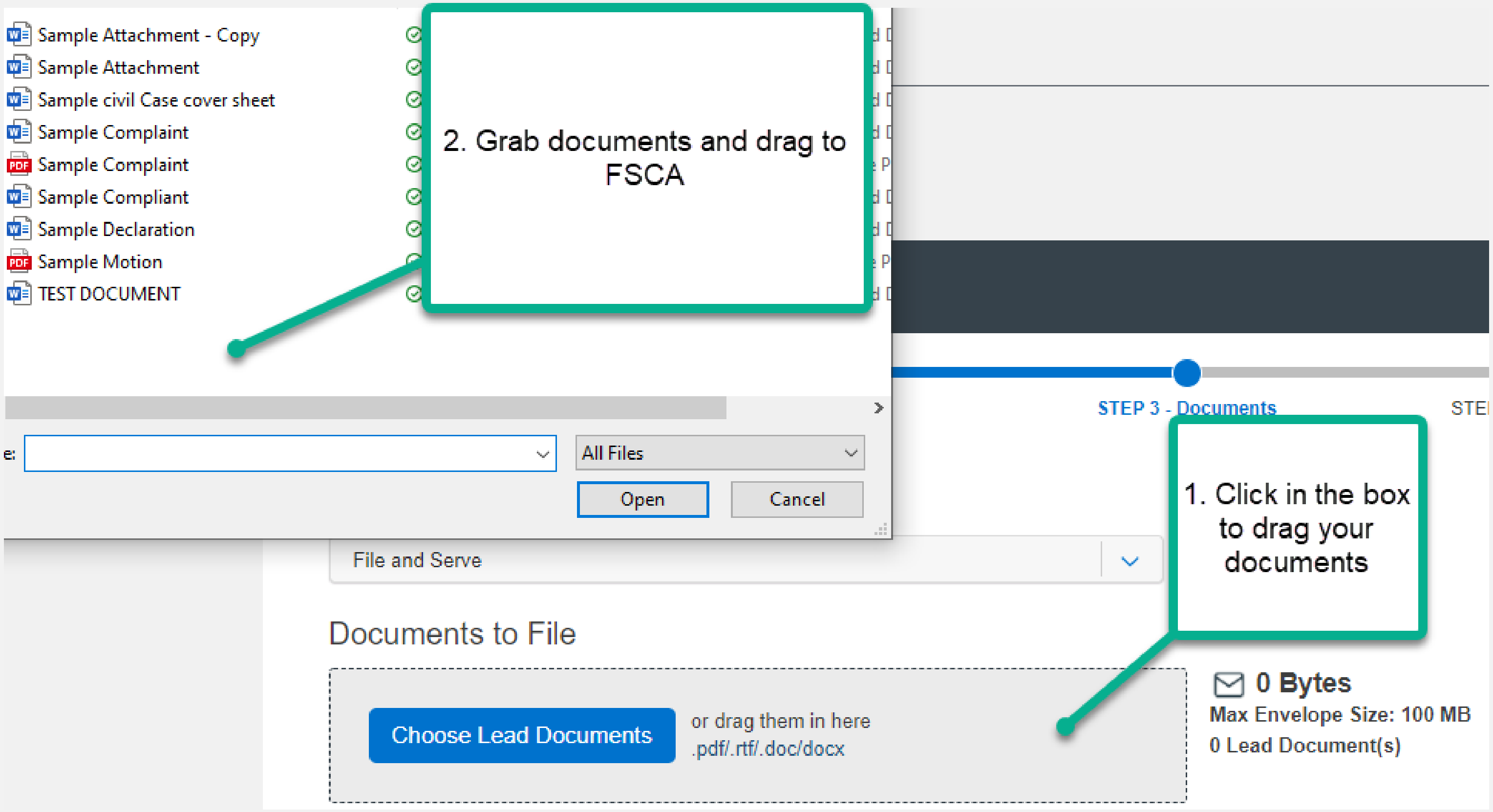

STEP 3 - DOCUMENTS *(continued)*

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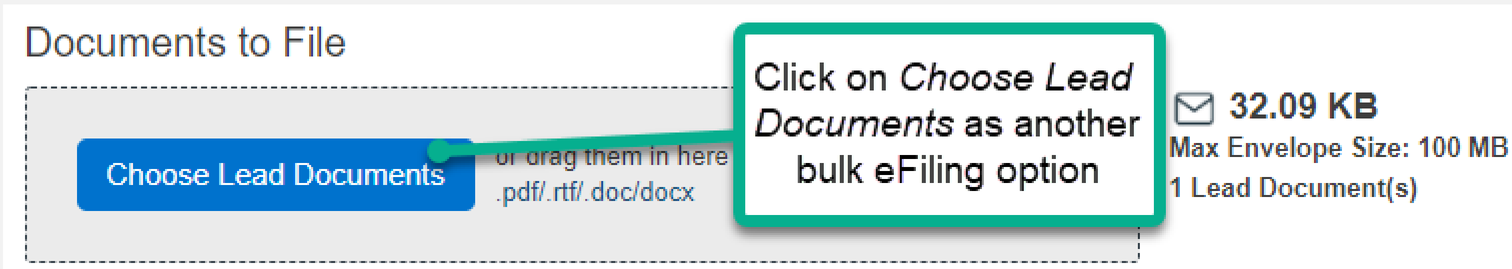

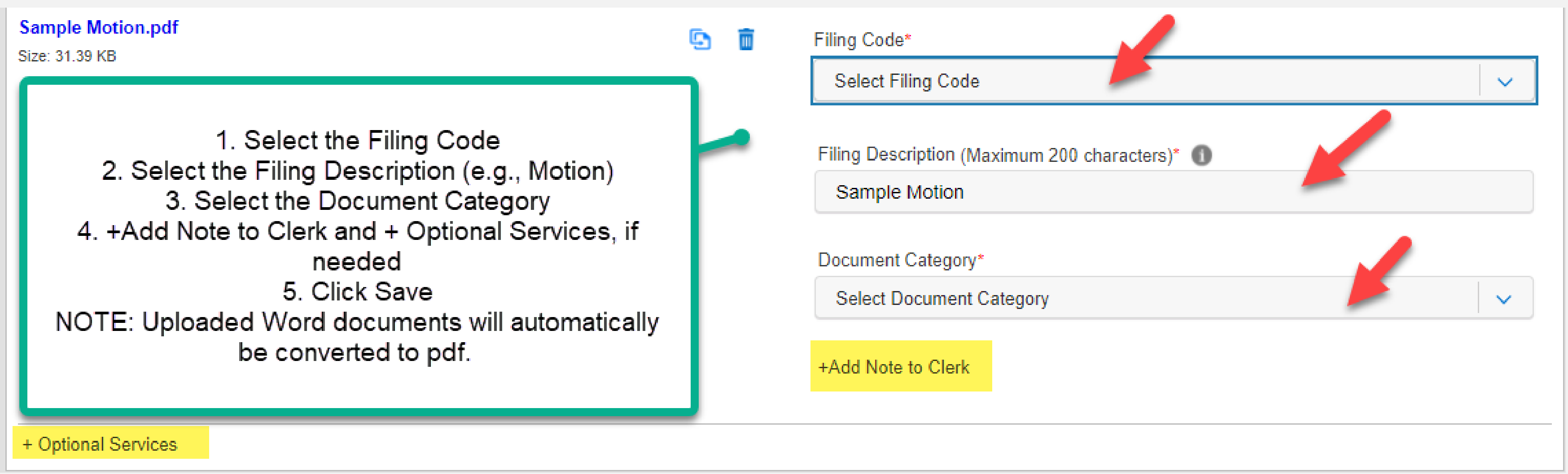

STEP 3 - DOCUMENTS *(continued)*

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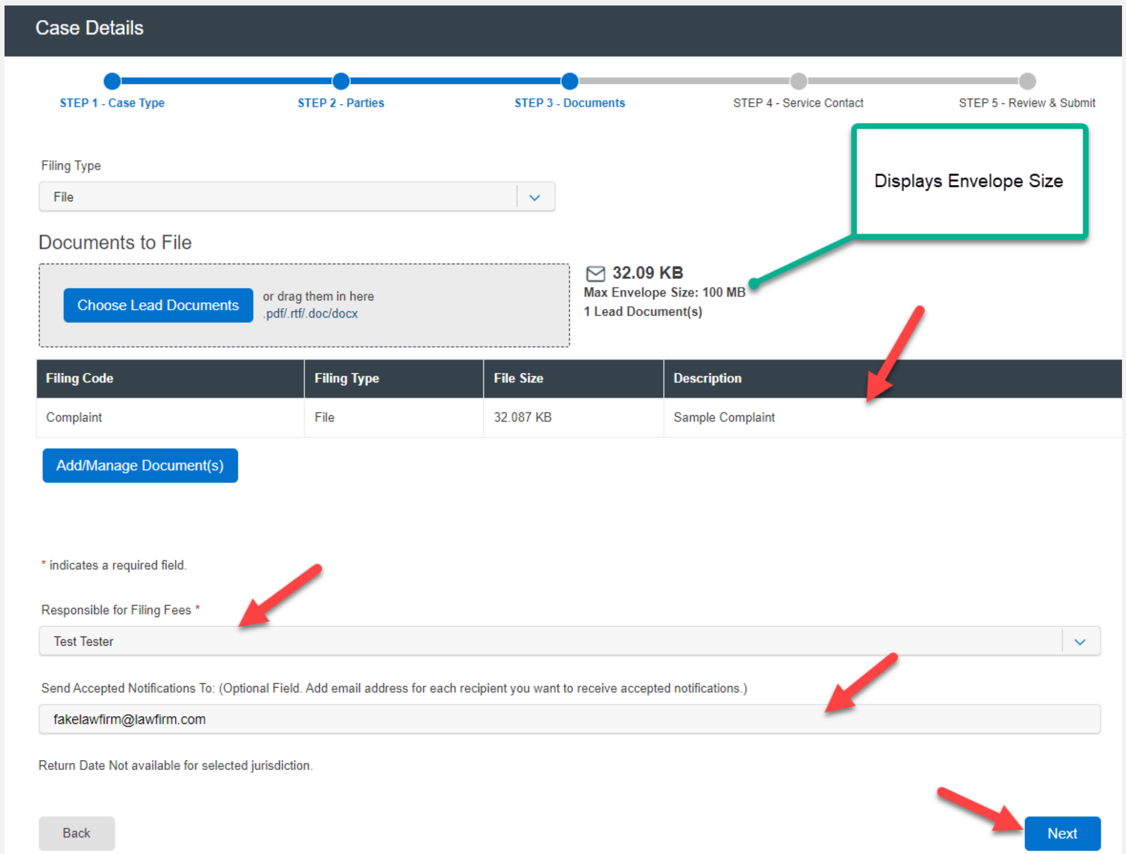
Once you've entered the information for **each document uploaded**, it will bring you back to the Documents tab. Select the party *Responsible for Filing Fees* and any *Notifications*, if desired. Click *Next* to move to Step 4.



STEP 4 – SERVICE CONTACT

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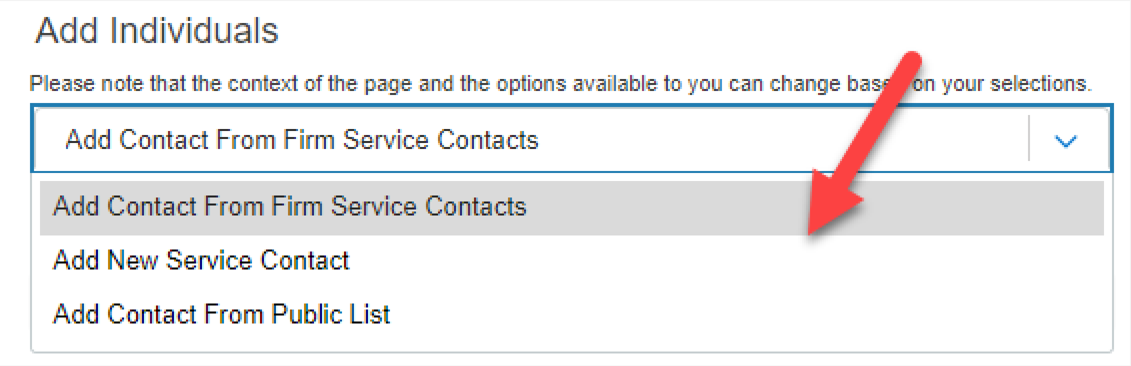
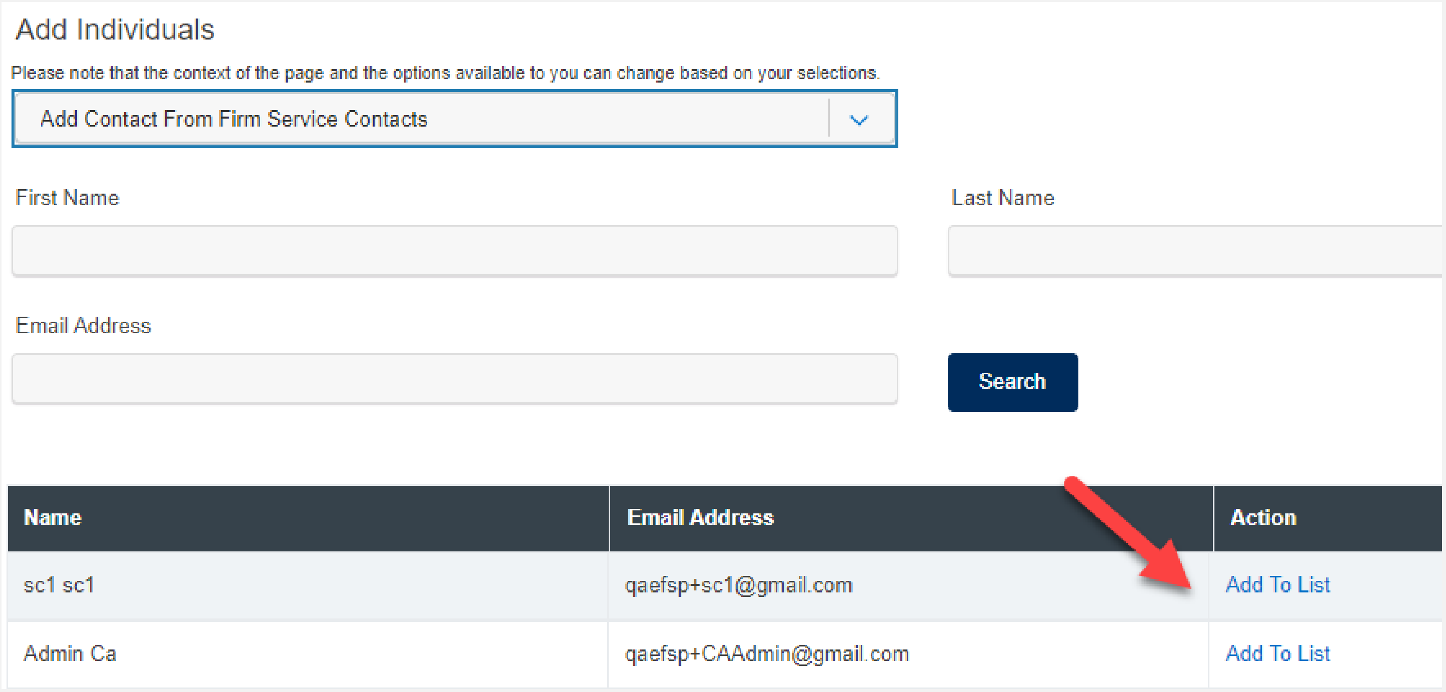
If you selected *File & Serve* in the *Filing Type* on Step 3 – Documents, the system will move you to Step 4- Service Contact. Otherwise, it will move you to Step 5 – Review & Submit. The instructions for Step 4 – Service Contact are below.

To create a service list, select one of these three (3) choices: *Add Contact From Firm Service Contacts*, *Add New Service Contact*, or *Add Contact From Public List* from the drop-down menu under *Add Individuals*.



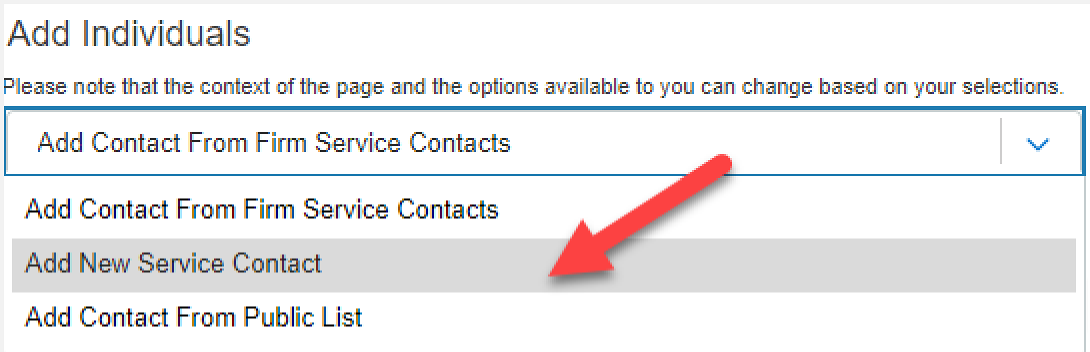
STEP 4 – SERVICE CONTACT *(continued)*

Selecting *Add Contact From Firm Service Contacts*, will display Firm Service Contacts (members of the firm that have been added under Service Contacts). Click on *Add to List* to add them to the Service List.



STEP 4 – SERVICE CONTACT *(continued)*

Selecting *Add New Service Contacts*, will prompt you to add their information. Please refer to the next slide for screenshot. Once you select *Save* they will be added to the list of service contacts. Select *Add to List* to add them to the Service List.



STEP 4 – SERVICE CONTACT *(continued)*

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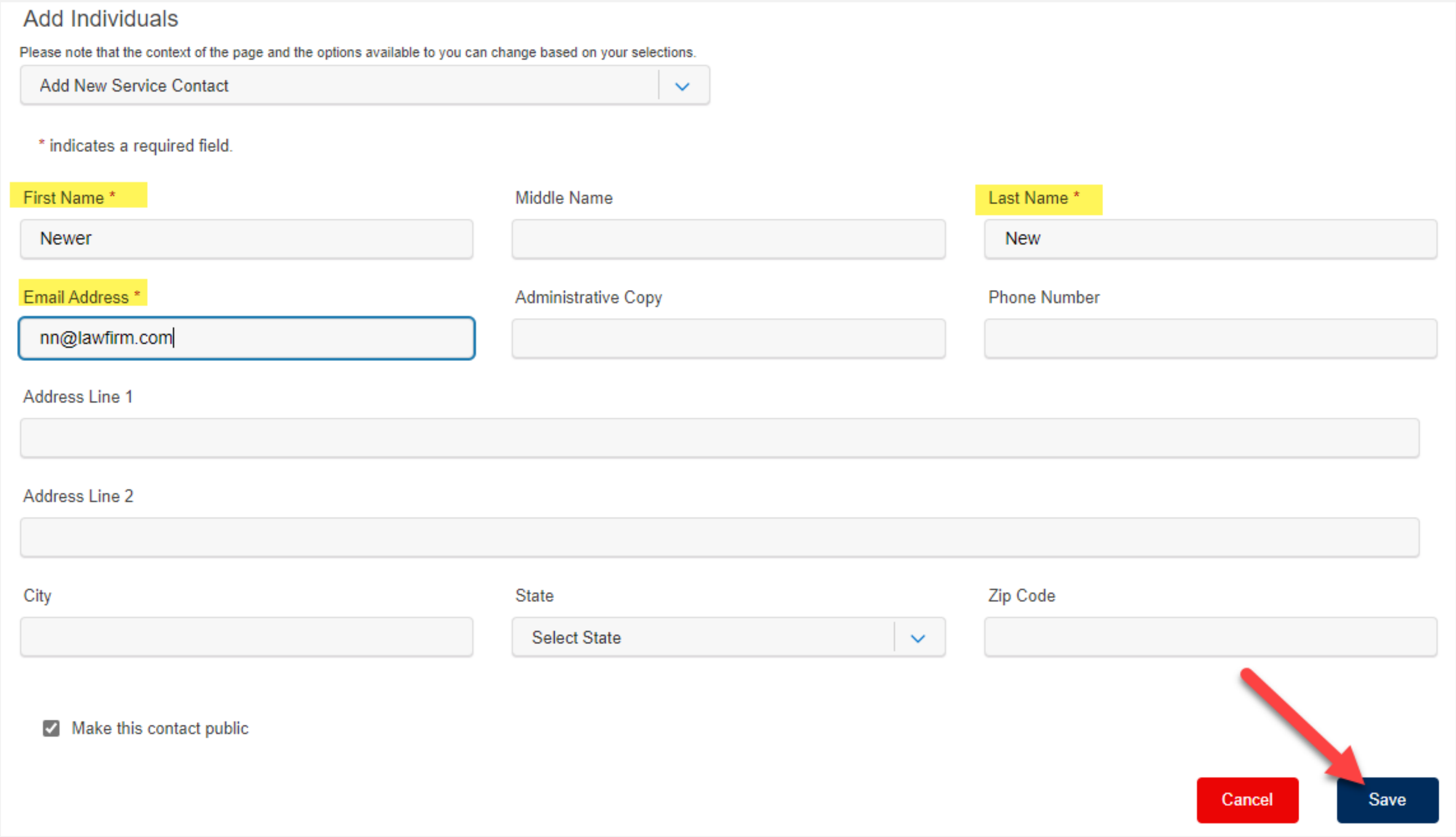
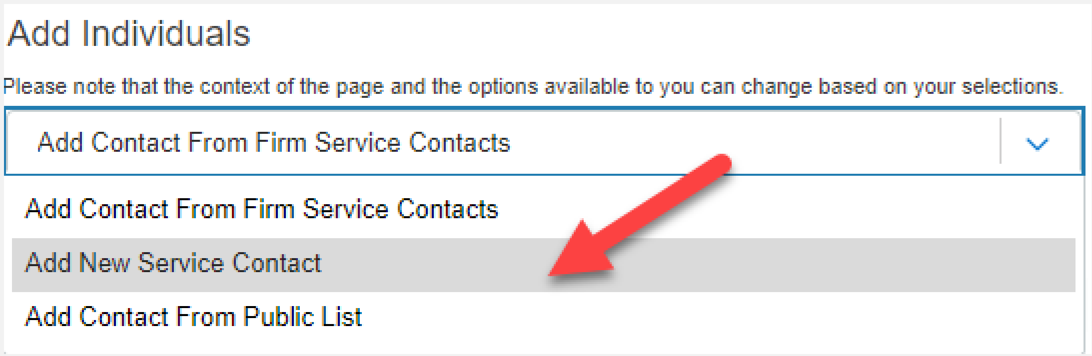
Selecting *Add New Service Contacts*, will prompt you to add their information.



STEP 4 – SERVICE CONTACT *(continued)*

Selecting *Add Contact From Public List*, will prompt you to *search* for opposing counsel from an attorney list provided by the California State Bar. Once found, select *Add to List* to add them to the Service List.



STEP 4 – SERVICE CONTACT *(continued)*

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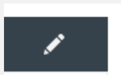
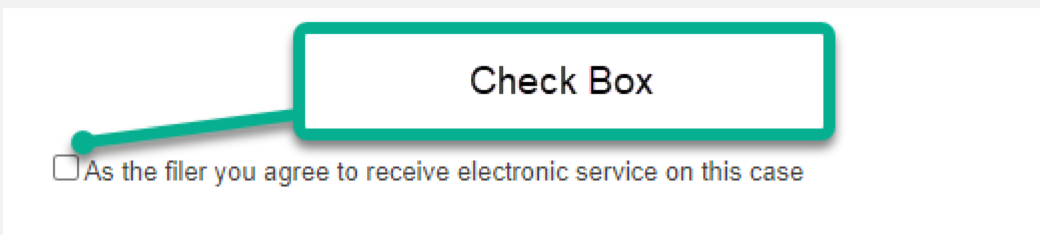
Lastly, under the column *Service Type*, you have the option to send the documents via eService, Certified Mail (fee), or Mail (fee).

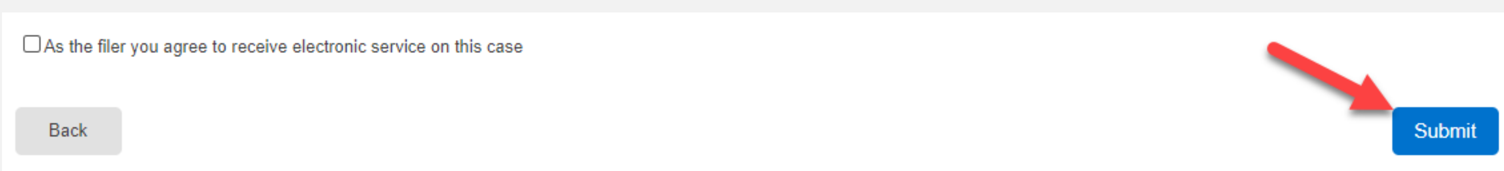
Click *Next* to move to Step 5 – Review & Submit.

This Step will allow you to review each Step prior to submission to the Court. There is an *edit icon*  next to each section/Step if you need to make any changes.

There is a *check box* prompting you to select *As the filer you agree to receive electronic service on this case*. Screenshot is below.



Once you are satisfied, click *Submit*.



COMPLETED FILINGS

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The *Completed Filings* page allows you to perform many tasks to manage your case matters, including,

1. Search capabilities, Reports (refer to next slide)
2. Obtain Process Service, Skip Trace, or Courtesy Copies (**where available**)
3. View your Transaction Summary
4. Cancel your Transaction – *prior* to clerk review
5. File into an Existing Case
6. View Service Contact Report (whether or not service contacts opened the documents)
7. Manage Service Contacts

COMPLETED FILINGS (*continued)*

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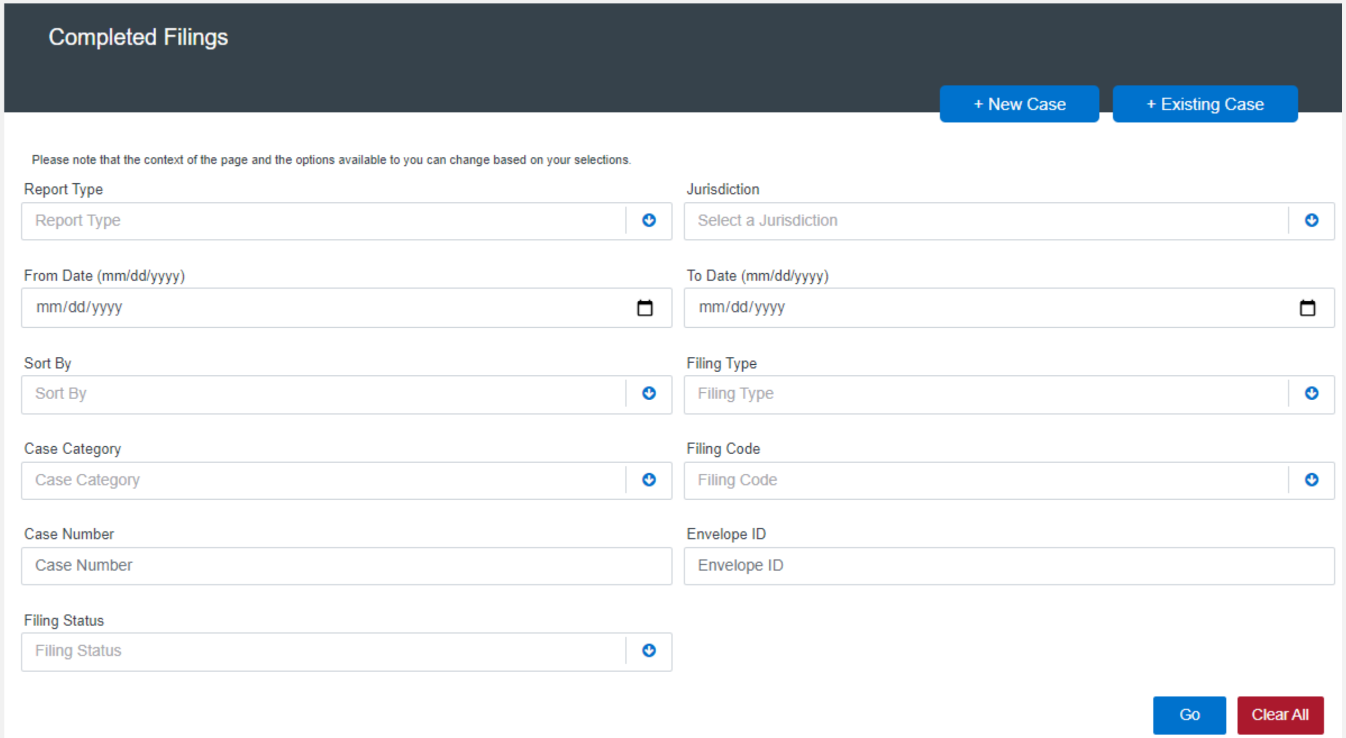
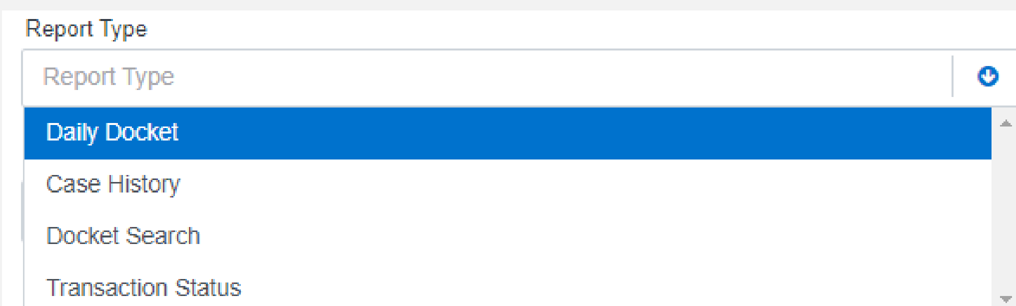


Search capabilities, Report Options (*see,* next slide)



COMPLETED FILINGS (*continued*)

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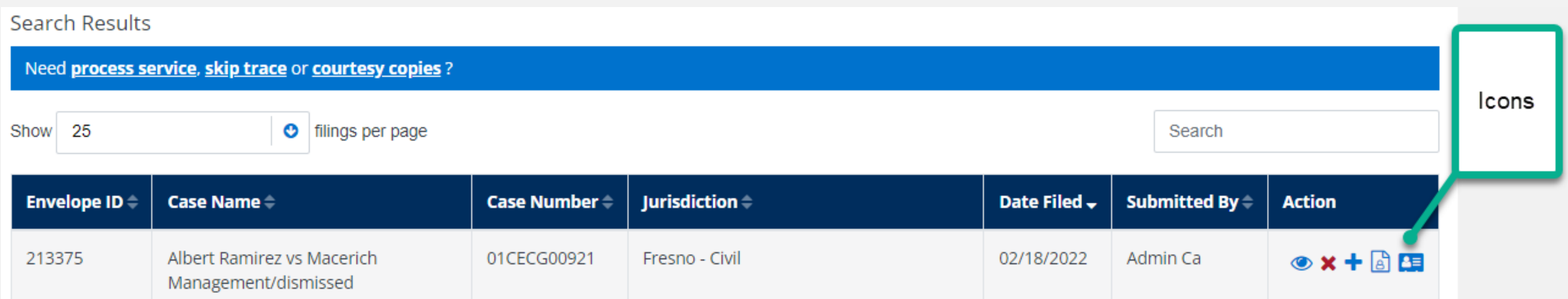
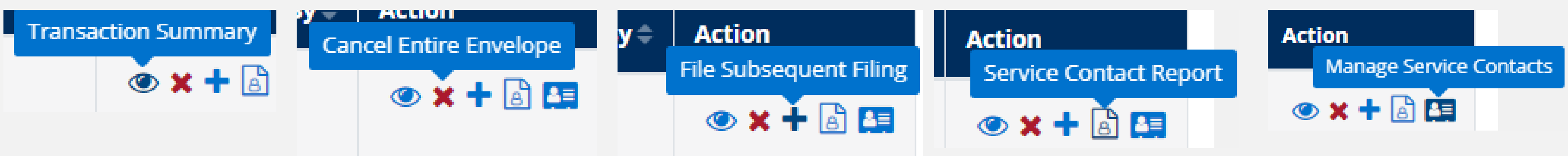
Reports

1. The *Daily Docket* report allows users to search for filings that they submitted in a specific date range. Use the drop-down menus and type fields to enter your search criteria and click *Go* to run the report.
2. The *Case History* report allows users to search for filings that they submitted in a specific case. Use the drop-down menus and type fields to enter your search criteria and click *Go* to run the report.
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 drop-down menus and type fields to enter your search criteria and click *Go* to run the report.
4. The Transaction Status report allows users to search for filings and view what the status is for those filings. Use the drop-down menus and type fields to enter your search criteria and click *Go* to run the report.

COMPLETED FILINGS (*continued*)



Here, you can view the icons that help streamline your case matters.



COMPLETED FILINGS (*continued*)

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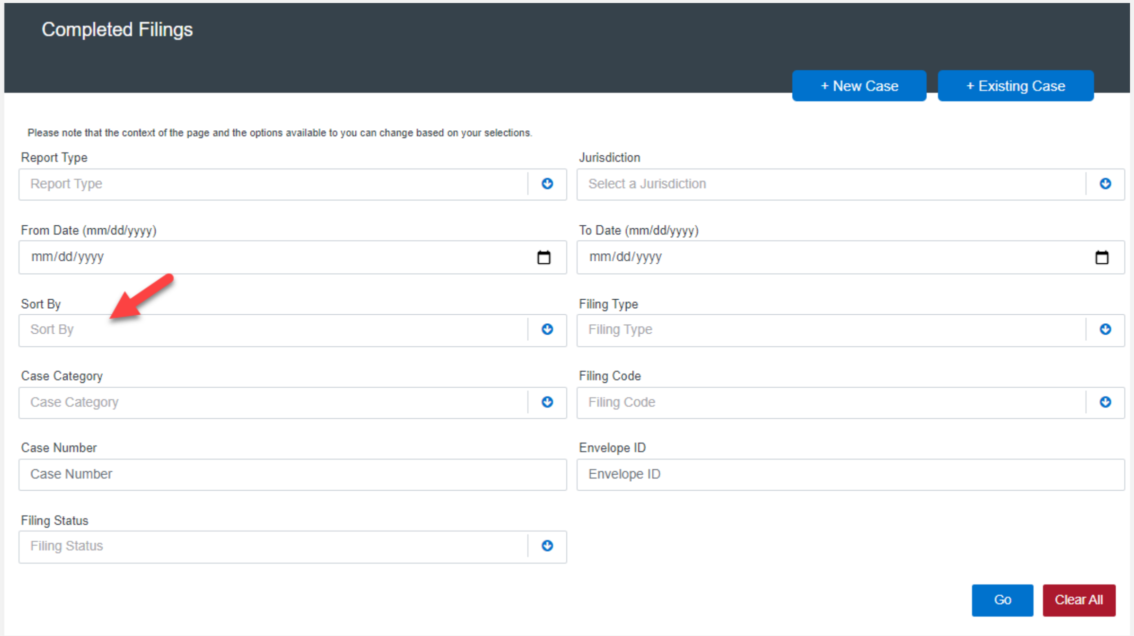
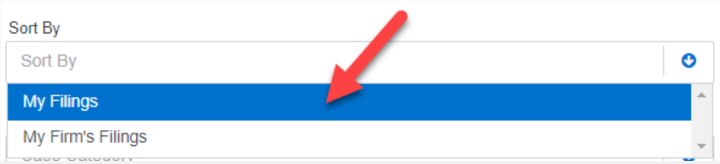
The *Completed Filings* page also allows you to search for **submitted filings** that you, or one of your colleagues, submitted. This option can be found under the *Sort By* drop-down menu.





LOCATING YOUR FILE-STAMPED DOCUMENTS

Once you receive the *Accepted* notification from eFile CA, you will be able to view your file-stamped document within FSCA. Here's how to find it:

1. Go to the *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. The link to your file-stamped document will be there. This link will remain available to view at any time.

Documents

Status	Filing Code	Filing Description	Original Document	Converted Document	Stamped Document	Optional Services	Document Category	Document Description	Fees
Accepted 04/19/2017 01:21:43 PM	Complaint (Lead Document) **Note to Clerk:**	Complaint	Generic Sample Complaint.pdf		Generic Sample Complaint.pdf		Non-Confidential	Complaint	$ 0.00

REVIEWING YOUR TRANSACTION SUMMARY

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You will be able to print the transaction summary for your records by clicking *Printable Version*. Additionally, you will be able to update the Client Matter ID on this screen. This is helpful when you file a new case and enter a "placeholder" Client Matter ID and once it comes back as *Accepted*, you can then put the assigned Client Matter ID for future reference and filings.

Please refer to next slide for screenshots for a visual representation of these items.

REVIEWING YOUR TRANSACTION SUMMARY (*continued*)

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Printable Version

Envelope ID:213375

Case Type	
Jurisdiction: Fresno - Civil	**Case Category:** Civil - Unlimited
Case Type: Other PI/PD/WD	
Payment Account: Mastercard Account2	**Attorney:** att1 att1
Case Number: 01CECG00921	***Hearing Date*** *is not available in this jurisdiction*
Client Matter ID: 1	**Date Filed:** 02/18/2022 09:33:09 AM

Client Matter ID: ASSIGNED CMID

REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS

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You may receive a *Return for Correction* or a *Rejected* notification from eFileCA. If you do, here are the steps to follow to correct and re-submit the document(s).

1. Go to the *Completed Filings* page.
2. Find the transaction with the *red arrow* (or, *back arrow*).
3. Click on the *red arrow* to open the transaction.
4. Once opened, continue through the steps, upload the amended documents and re-*Submit* to the court.


Search Results

Need process service, skip trace or courtesy copies ?

Show 25 filings per page Search

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
248385	1 PERSON Vs. ORGANIZATION	2021CH00922	Cook County - Chancery - District 1 - Chicago	10/05/2021	Admin 0730	
248384	1 PERSON VS. ORGANIZATION	2021CH00922	Cook County - Chancery - District 1 - Chicago	10/05/2021	Admin 0730	

INCOMPLETE FILINGS

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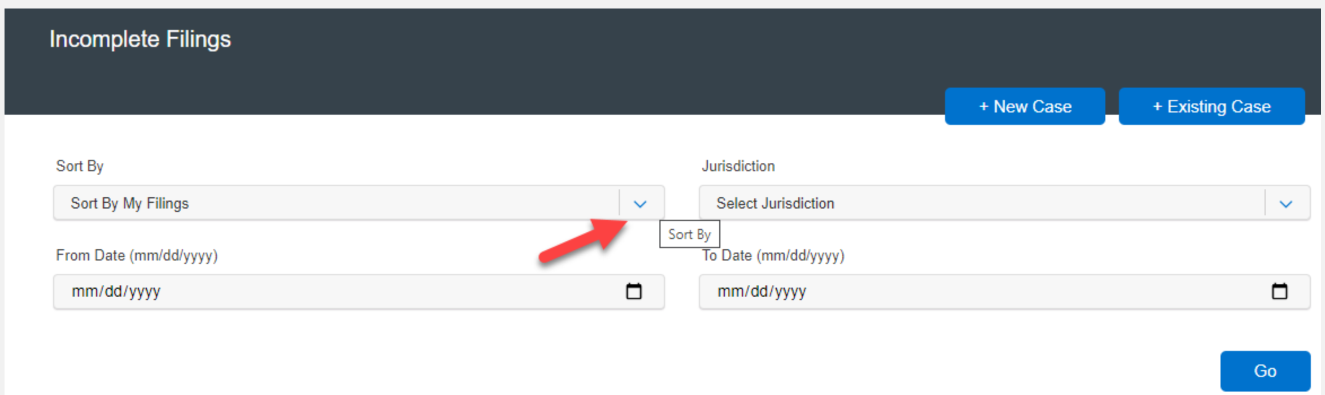
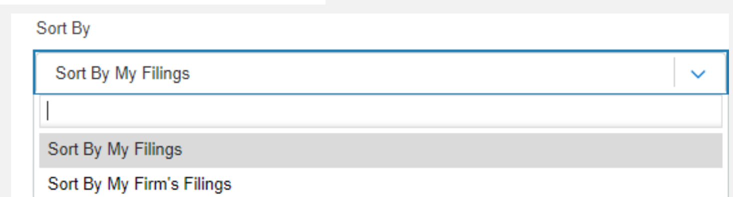
You can log out of FSCA in the middle of a transaction and finish it later.

1. Select *Incomplete Filings* under the *Filing* drop-down menu.
2. Find the transaction you need to complete and submit; ***or,*** to remove completely. You can complete this step, or if needed, one of your colleagues can complete it for you. Under the *Sort By*, select *My Filings*, or *My Firm's Filings.* Additional screenshots are on the next slide.





INCOMPLETE FILINGS (*continued*)