



# File & Serve *California*™

**USER GUIDE**

**New Case Filing**

# What's Inside

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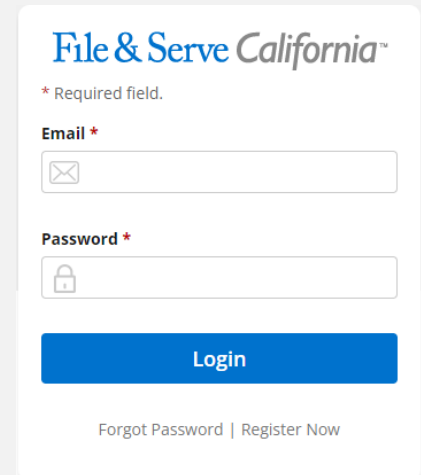
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File & Serve *California* (FSCA) has many resources available to you in order to address your questions and concerns:

- **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](http://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

## Logging in to FSCA



File & Serve California™

\* Required field.

Email \*

Password \*

Login

Forgot Password | Register Now

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.

1. Open Chrome, Safari, or Firefox go to [www.fileandservealifornia.com](http://www.fileandservealifornia.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](http://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.

File & Serve California™

Resources Support Need to eFile out of state?

WELCOME TO  
eFILING AND eSERVICE IN

California

File & Serve California™

\* Required field.

Email \*

Password \*

Login

Forgot Password | Register Now

**FSX Support Center**

Our team of eFiling experts is available around the clock to assist you!

1-888-529-7587 support@fileandserve.com Chat Online

# GETTING STARTED *(continued)*

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.

## Case Details

\* 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? \*

No

Case Type \*

No Case Type selected

Jurisdiction \*  Preferred list  Full list

No Jurisdiction selected

Payment Account \*

No Payment Account selected

Case Category \*

No Case Category selected

Attorney \*

No Attorney selected

Client Matter ID \*

Next

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)

### 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? *	Case Type *
<input type="text" value="No"/>	<input type="text" value="Civil Rights (\$435.00)"/>
Jurisdiction * <input checked="" type="radio"/> Preferred list <input type="radio"/> Full list	Payment Account *
<input type="text" value="Fresno - Civil"/>	<input type="text" value="Mastercard Account2"/>
Case Category *	Attorney *
<input type="text" value="Civil - Unlimited"/>	<input type="text" value="NewAtty Lastname"/>
	Client Matter ID *
	<input type="text" value="12345"/>





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)

**Case Details**

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

\* indicates a required party.

List of Parties  
Total Case Parties: 0

Search by Party Name

Sending Party	Party Type	Party Name	Lead Attorney	Additional Attorneys	Actions
	Add a Defendant *				
	Add a Plaintiff *				

At least one of each Required Party must be added.

Add at least 1 Plaintiff and 1 Defendant. Additional Parties if needed.

# STEP 2 – PARTIES (continued)

**Add a Party**

**Party Type (Required)**  **Lead Attorney**  **Additional Attorneys**  
Multiple attorneys are not allowed in this jurisdiction

**Person Or Organization**  Person  Organization **Is this your client**  Yes  No

**First Name (Required)**  **Middle Name**  **Last Name (Required)**

Address Line 1

Address Line 2

City  State  Zip Code

Phone Number  Date Of Birth

Drivers License Type  Drivers License State  Drivers License Number

Social Security Number  Interpreter

Enter the at least the Required information and click, Add Party

# STEP 2 - PARTIES (continued)

**Case Details**

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

\* indicates a required party.

List of Parties  
Total Case Parties: 2

Search by Party Name

Sending Party	Party Type	Party Name	Lead Attorney	Additional Attorneys	Actions
<input type="checkbox"/>	Plaintiff	Test Tester			
<input type="checkbox"/>	Defendant	Fake Corp			

At least one of each Required Party must be added.

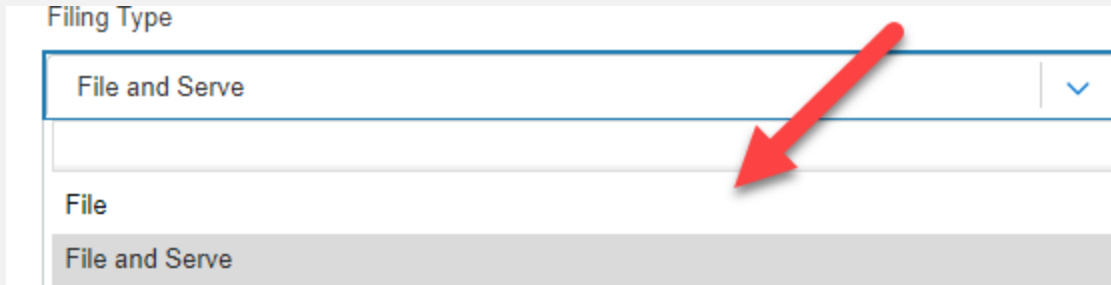
Select the Sending Party (i.e., the Filing Party)

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*.



The screenshot shows a 'Filing Type' dropdown menu. The menu is open, displaying two options: 'File and Serve' (which is currently selected) and 'File'. A red arrow points to the dropdown arrow on the right side of the menu.

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)

Case Details

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

Filing Type: **Select Filing Type** (dropdown menu) File

**Add Documents here** (button)

Documents to File

**Choose Lead Documents** (button) or drag them in here .pdf/.rtf/.doc/docx

0 Bytes  
Max Envelope Size: 100 MB  
0 Lead Document(s)

Filing Code	Filing Type	File Size	Description
<b>Add/Manage Document(s)</b> (button)			

\* indicates a required field.

Responsible for Filing Fees \* (dropdown menu) Select Responsible Party

Send Accepted Notifications To: (Optional Field. Add email address for each recipient you want to receive accepted notifications.)  
example@example.com, example@example.com

Return Date Not available for selected jurisdiction.

**If you needed Notifications sent, enter email addresses here.** (text box)

Back (button)    **Next** (button)

# STEP 3 - DOCUMENTS (continued)

2. Grab documents and drag to FSCA

1. Click in the box to drag your documents

STEP 3 - Documents

File and Serve

Documents to File

Choose Lead Documents or drag them in here .pdf/.rtf/.doc/docx

0 Bytes  
Max Envelope Size: 100 MB  
0 Lead Document(s)

Sample Attachment - Copy  
Sample Attachment  
Sample civil Case cover sheet  
Sample Complaint  
Sample Complaint  
Sample Complaint  
Sample Declaration  
Sample Motion  
TEST DOCUMENT

All Files

Open Cancel

# STEP 3 - DOCUMENTS (continued)

Documents to File

Choose Lead Documents

or drag them in here  
.pdf/.rtf/.doc/docx

Click on *Choose Lead Documents* as another bulk eFiling option

32.09 KB  
Max Envelope Size: 100 MB  
1 Lead Document(s)

Sample Motion.pdf  
Size: 31.39 KB

1. Select the Filing Code
2. Select the Filing Description (e.g., Motion)
3. Select the Document Category
4. +Add Note to Clerk and + Optional Services, if needed
5. Click Save

NOTE: Uploaded Word documents will automatically be converted to pdf.

+ Optional Services

Filing Code\*  
Select Filing Code

Filing Description (Maximum 200 characters)\* ⓘ  
Sample Motion

Document Category\*  
Select Document Category

+Add Note to Clerk



# STEP 3 - DOCUMENTS (continued)

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.

Case Details

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

Filing Type  
File

Documents to File  
Choose Lead Documents or drag them in here .pdf/.rtf/.doc/docx

32.09 KB  
Max Envelope Size: 100 MB  
1 Lead Document(s)

Filing Code	Filing Type	File Size	Description
Complaint	File	32.087 KB	Sample Complaint

Add/Manage Document(s)

\* indicates a required field.

Responsible for Filing Fees \*  
Test Tester

Send Accepted Notifications To: (Optional Field. Add email address for each recipient you want to receive accepted notifications.)  
fakelawfirm@lawfirm.com

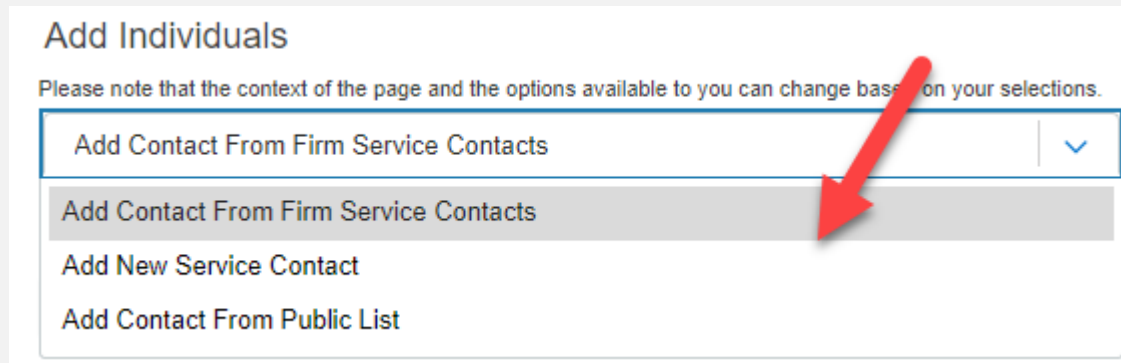
Return Date Not available for selected jurisdiction.

Back    Next

# STEP 4 – SERVICE CONTACT

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*.




The screenshot shows a web interface titled "Add Individuals". Below the title is a note: "Please note that the context of the page and the options available to you can change based on your selections." Below this note is a dropdown menu with four options: "Add Contact From Firm Service Contacts", "Add Contact From Firm Service Contacts", "Add New Service Contact", and "Add Contact From Public List". The first option is currently selected and highlighted in grey. A red arrow points to this selected option.

# 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.

**Add Individuals**

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

Add Contact From Firm Service Contacts 


First Name

Last Name

Email Address

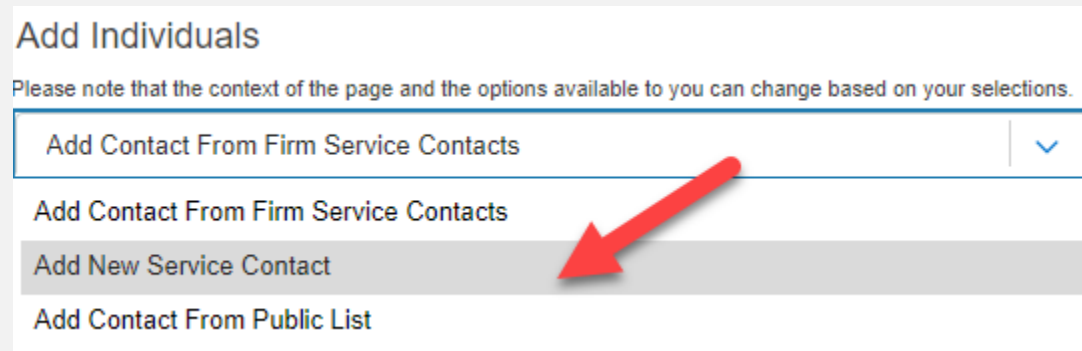
[Search](#)

Name	Email Address	Action
sc1 sc1	qaefsp+sc1@gmail.com	<a href="#">Add To List</a>
Admin Ca	qaefsp+CAAdmin@gmail.com	<a href="#">Add To List</a>



# 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)

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

**Add Individuals**


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

Add New Service Contact

\* indicates a required field.

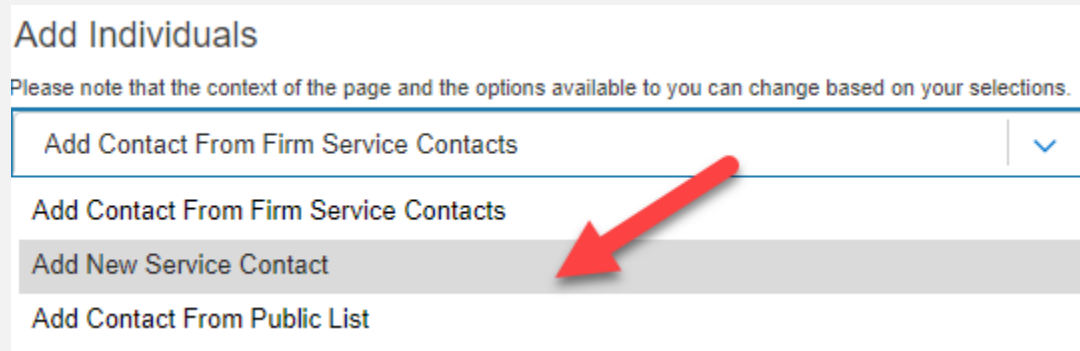
<b>First Name *</b>	Middle Name	<b>Last Name *</b>
<input type="text" value="Newer"/>	<input type="text"/>	<input type="text" value="New"/>
<b>Email Address *</b>	Administrative Copy	Phone Number
<input type="text" value="nn@lawfirm.com"/>	<input type="text"/>	<input type="text"/>
Address Line 1		
<input type="text"/>		
Address Line 2		
<input type="text"/>		
City	State	Zip Code
<input type="text"/>	<input type="text" value="Select State"/>	<input type="text"/>

Make this contact public



# 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)


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.

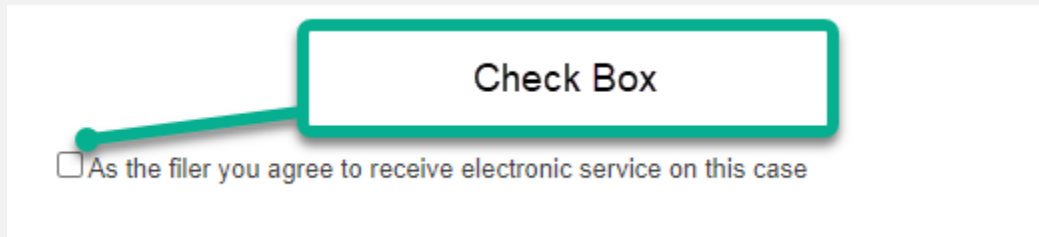
Serve	1	Name	Email Address	Service Type	Action
<input checked="" type="checkbox"/>		Loren Sofia	ls@lawfirm.com	Certified Mail (\$10.00 Fee) 	 

Add Individuals

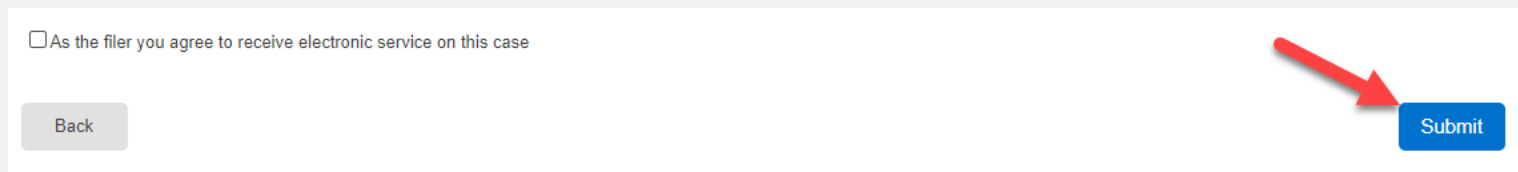
# STEP 5 – REVIEW & SUBMIT

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*.





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)

## 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.

<b>Report Type</b> Report Type	<b>Jurisdiction</b> Select a Jurisdiction
<b>From Date (mm/dd/yyyy)</b> mm/dd/yyyy	<b>To Date (mm/dd/yyyy)</b> mm/dd/yyyy
<b>Sort By</b> Sort By	<b>Filing Type</b> Filing Type
<b>Case Category</b> Case Category	<b>Filing Code</b> Filing Code
<b>Case Number</b> Case Number	<b>Envelope ID</b> Envelope ID
<b>Filing Status</b> Filing Status	

Go

Clear All

Search capabilities, Report Options (see, next slide)

### Report Type

Report Type

Daily Docket

Case History

Docket Search

Transaction Status

## 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)

Search Results

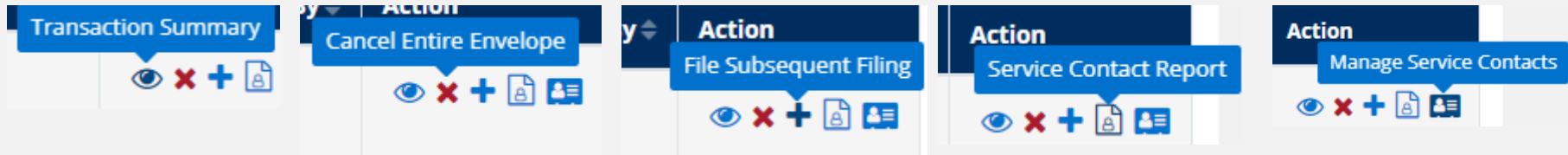
Need [process service](#), [skip trace](#) or [courtesy copies](#) ?

Show  filings per page

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
213375	Albert Ramirez vs Macerich Management/dismissed	01CECG00921	Fresno - Civil	02/18/2022	Admin Ca	    

Icons

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



# COMPLETED FILINGS (*continued*)

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.

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

Jurisdiction

From Date (mm/dd/yyyy)

To Date (mm/dd/yyyy)

Sort By

Filing Type

Case Category

Filing Code

Case Number

Envelope ID

Filing Status

Go Clear All

Sort By

Sort By

My Filings

My Firm's Filings

# 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 P M	Complaint (Lead Document) <b>Note to Clerk:</b>	Complaint	<a href="#">Generic Sample Complaint.pdf</a>		<a href="#">Generic Sample Complaint.pdf</a>		Non-Confidential	Complaint	\$ 0.00



# REVIEWING YOUR TRANSACTION SUMMARY

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)



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

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   filings per page

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

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

+ New Case + Existing Case

Sort By: Sort By My Filings

Jurisdiction: Select Jurisdiction

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

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

Go

Sort By

Sort By My Filings

Sort By My Firm's Filings

# INCOMPLETE FILINGS (continued)

Inbox Filing Firm Admin

- Submit a New Filing
- Completed Filings
- Incomplete Filings

+ New Case

+ Existing Case

Sort By

Sort By My Filings

Jurisdiction

Select Jurisdiction

From Date (mm/dd/yyyy)

mm/dd/yyyy

To Date (mm/dd/yyyy)

mm/dd/yyyy

Go

Search Results

Show 25 filings per page

Search

Jurisdiction	Case Name	Case Number	Created on	Created By	Action
Fresno - Civil			03/05/2022	Admin Ca	