



File & Serve *California*™

USER GUIDE
Subsequent Filing

What's Inside

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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) contains helpful information for using the FSCA system. The website houses our training registration information, user guides, pricing, and more.

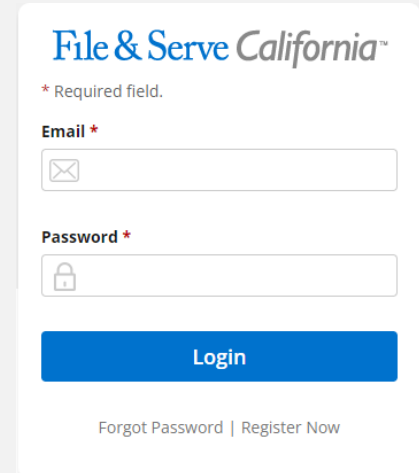
SUBSEQUENT FILING OVERVIEW

This FSCA User Guide provides a convenient source of information to help you efficiently eFile into an existing case.

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

A screenshot of the FSCA login interface. At the top is the 'File & Serve California' logo. Below it is a note: '* Required field.' There are two input fields: 'Email *' with an envelope icon and 'Password *' with a lock icon. A blue 'Login' button is positioned below the password field. At the bottom of the form, there are links for 'Forgot Password' and 'Register Now'.

1. Open Chrome, Safari, or Firefox go to 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
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

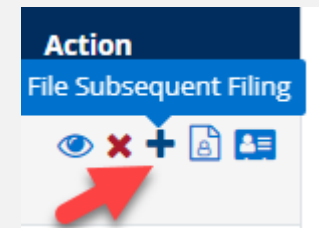
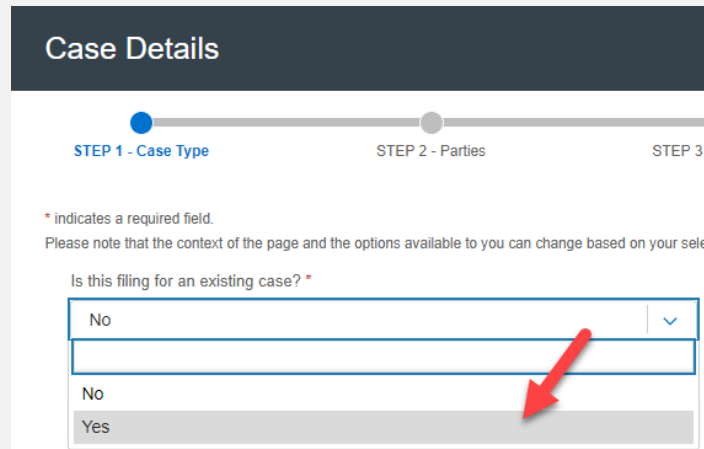
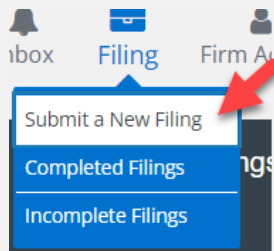
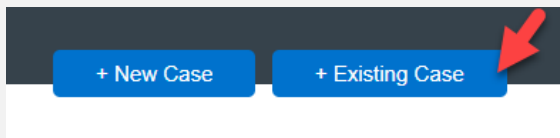
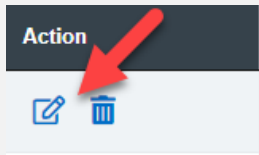
Our team of eFiling experts is available around the clock to assist you!

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. If you have any unfinished transactions from previous sessions, you will be taken to the *Incomplete Filings* page.

4. To begin a subsequent filing or submit an unfinished transaction (*Incomplete Filings*), click on the *edit icon*, the *+Existing Case* button (on the *Incomplete Filings* page or the *Completed Filings* page), or *Submit a New Filing* in the *Filing* drop-down menu. Once on the *Case Details* page, select *Yes* under *Is this filing for an existing case?* in *Step 1 – Case Type*. You can also click on the *+ icon* under the *Action* column on the *Completed Filings* page next to the case matter.



STEP 1 – CASE TYPE

All fields in Step 1 will be auto-populated. Verify the information. You will be able to amend the *Payment Account*, *Attorney*, or *Client Matter ID*. Click *Next* to move to Step 2 – Parties.

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? *
Yes

Case Type *
Other PI/PD/WD (\$435.00)

Case Number
01CECG00921

Payment Account *
Mastercard Account2

Jurisdiction *
Fresno - Civil

Attorney *
att1 att1

Case Category *
Civil - Unlimited

Client Matter ID *
1

Next

STEP 2 - PARTIES

The case parties will also be auto-populated. If you needed to add any additional case parties, you can do so via *Add Party*.

List of Parties
Total Case Parties: 5

Sending Party	Party Type	Party Name	Lead Attorney	Additional Attorneys	Actions
<input checked="" type="checkbox"/>	Defendant	Fred Weber			
<input checked="" type="checkbox"/>	Defendant	John Doe 2			
<input type="checkbox"/>	Defendant	John Doe 1			
<input type="checkbox"/>	Defendant	Macerich Company			
<input type="checkbox"/>	Plaintiff	Albert Ramirez			

You can add additional case parties if needed

STEP 2 – PARTIES (continued)

Add Party will open a dialogue box. Enter the necessary information. Click Add Party to add them to the list. Make sure to select a *Sending Party*. Click *Next* to move to Step 3 – Documents.

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

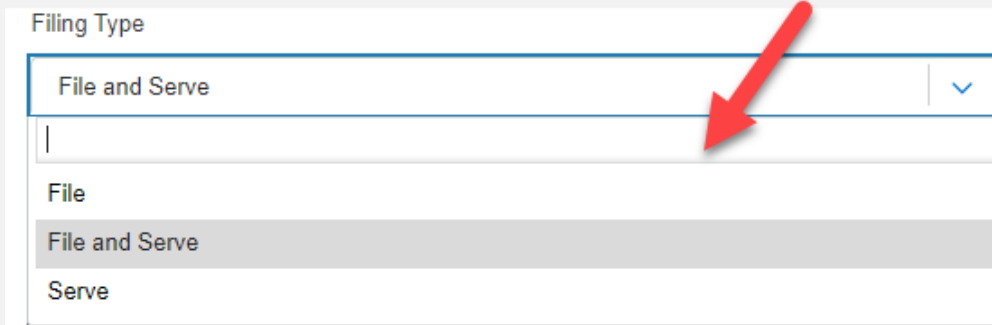
Social Security Number Interpreter

Sending Party	Party Type
<input checked="" type="checkbox"/>	Defendant
<input checked="" type="checkbox"/>	Defendant
<input type="checkbox"/>	Defendant
<input type="checkbox"/>	Defendant
<input type="checkbox"/>	Plaintiff

STEP 3 - DOCUMENTS

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

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



The screenshot shows a 'Filing Type' dropdown menu. The current selection is 'File and Serve'. The dropdown is open, showing a list of options: 'File', 'File and Serve', and 'Serve'. A red arrow points to the 'File and Serve' option in the list.

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) **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
-------------	-------------	-----------	-------------

Add/Manage Document(s) (button) **To make any updates or changes once uploaded, select Add/Manage Document(s)** (text box)

* indicates a required field.

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

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)

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

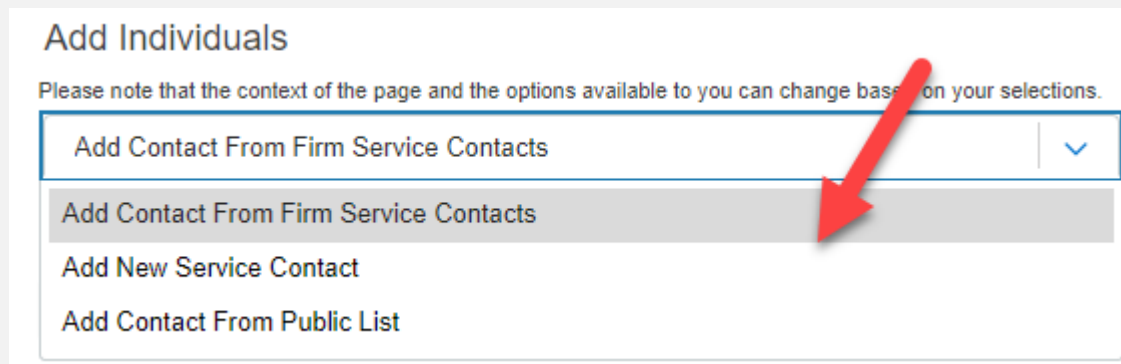
Return Date Not available for selected jurisdiction.

Back Next

STEP 4 – SERVICE CONTACT

If you selected *File & Serve* or *Serve* in the Filing Type on Step 3 – Documents, the system will move you to Step 4- Service Contact. Please follow these instructions.

To add to your 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". A red arrow points to the first option, "Add Contact From Firm Service Contacts".

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	Add To List
Admin Ca	qaefsp+CAAdmin@gmail.com	Add To 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.

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
- Add Contact From Firm Service Contacts
- Add New Service Contact**
- Add Contact From Public 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.


First Name *	Middle Name	Last Name *
<input type="text" value="Newer"/>	<input type="text"/>	<input type="text" value="New"/>
Email Address *	Administrative Copy	Phone Number
<input type="text" value="nn@lawfirm.com"/>	<input type="text"/>	<input type="text"/>

Address Line 1

Address Line 2

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.

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

Add Contact From Firm Service Contacts

Add New Service Contact





Add Contact From Public List




If you are not adding anyone to the service list, select those service contacts that require service of this transaction by checking the box next to their name.

Who should be notified about this filing?

Current Notice List: Parties will be Served and notified.

Serve	2	Name	Email Address	Service Type	Associated Parties	Action
<input checked="" type="checkbox"/>		Admin Ca	qaefsp+CAAdmin@gmail.com	EServe	Case x	 
<input checked="" type="checkbox"/>		John Doe	qaefsp+JDoe@gmail.com	EServe	Case x	 







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).

Who should be notified about this filing?

Current Notice List: Parties will be Served and notified.

Serve	2	Name	Email Address	Service Type	Associated Parties	Action
<input checked="" type="checkbox"/>		Admin Ca	qaefsp+CAAdmin@gmail.com	EService	Case ×	 
<input checked="" type="checkbox"/>		John Doe	qaefsp+JDoe@gmail.com	EService	Case ×	 


Add Individuals

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

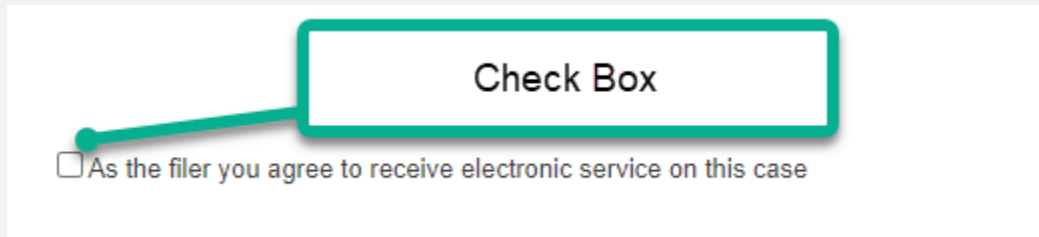
- Certified Mail (\$10.00 Fee)
- EService
- Mail (\$3.00 Fee)

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

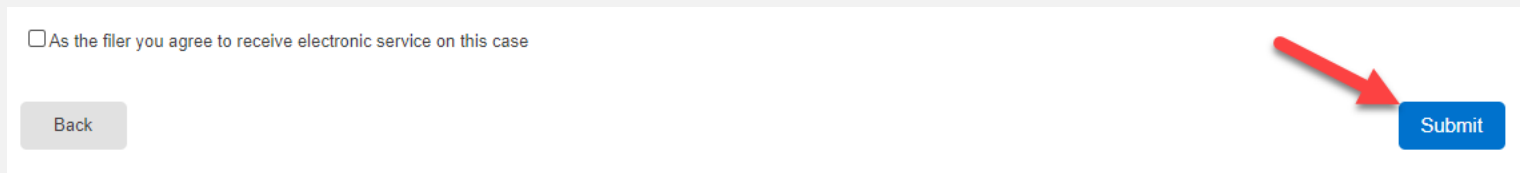
STEP 5 – REVIEW & SUBMIT

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 screenshot on 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 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.

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 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	

Where available, simply click to begin the process

Icons

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

Transaction Summary

Cancel Entire Envelope

Action
File Subsequent Filing

Action
Service Contact Report

Action
Manage Service Contacts

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: 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

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) Note to Clerk:	Complaint	Generic Sample Complaint.pdf		Generic Sample Complaint.pdf		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. 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.

The screenshot displays the 'Incomplete Filings' interface. At the top, there are two buttons: '+ New Case' and '+ Existing Case'. Below these are search filters: 'Sort By' (set to 'Sort By My Filings'), 'Jurisdiction' (set to 'Select Jurisdiction'), 'From Date (mm/dd/yyyy)' (set to 'mm/dd/yyyy'), and 'To Date (mm/dd/yyyy)' (set to 'mm/dd/yyyy'). A red arrow points to the 'Sort By' dropdown menu. A 'Go' button is located below the filters. An inset shows the 'Sort By' dropdown menu expanded, listing 'Sort By My Filings' and 'Sort By My Firm's Filings' as options.

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	