File & Serve California™

USER GUIDE
Subsequent Filing

File & Serve California™

What's Inside

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FILE & SERVE CALIFORNIA RESOURCES

File & Serve California

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.

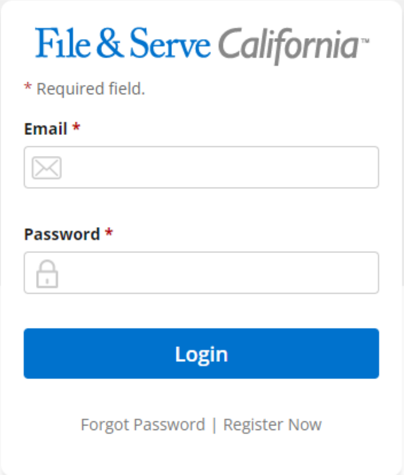
Before You Begin

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



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

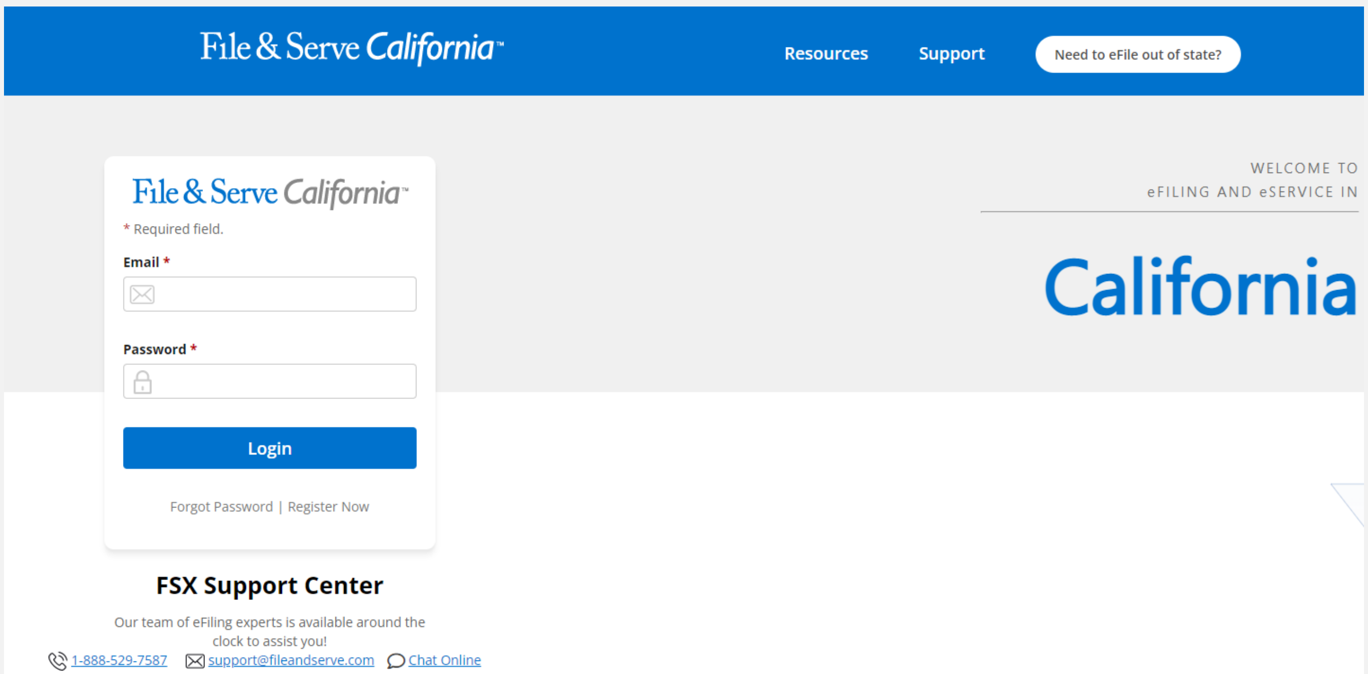
2. Enter your Username and Password and click **Login**.

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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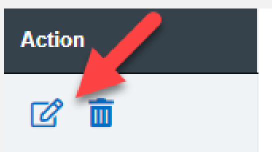
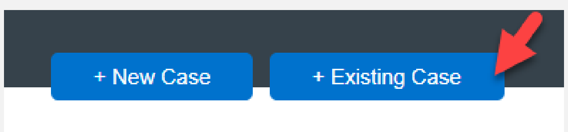
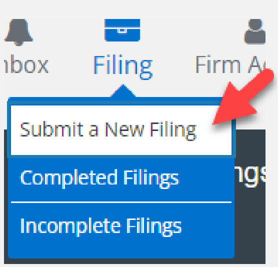
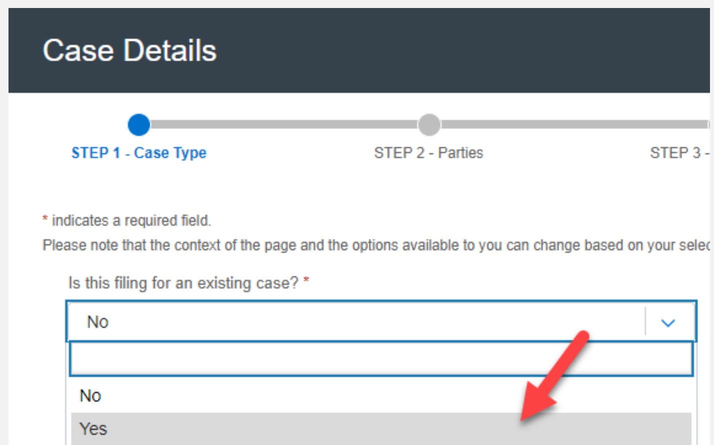
3. Once you are logged into your account, you will be taken to the *Case Details* page to begin your filing. If you have any unfinished transactions from previous sessions, you will be taken to the *Incomplete Filings* page.

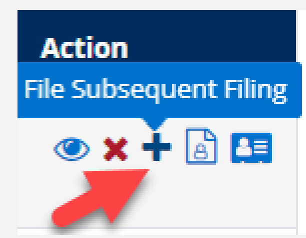
4. To begin a subsequent filing or submit an unfinished transaction (*Incomplete Filings*), click on the *edit icon*, the *+Existing Case* button (on the *Incomplete Filings* page or the *Completed Filings* page), or *Submit a New Filing* in the *Filing* drop-down menu. Once on the *Case Details* page, 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.





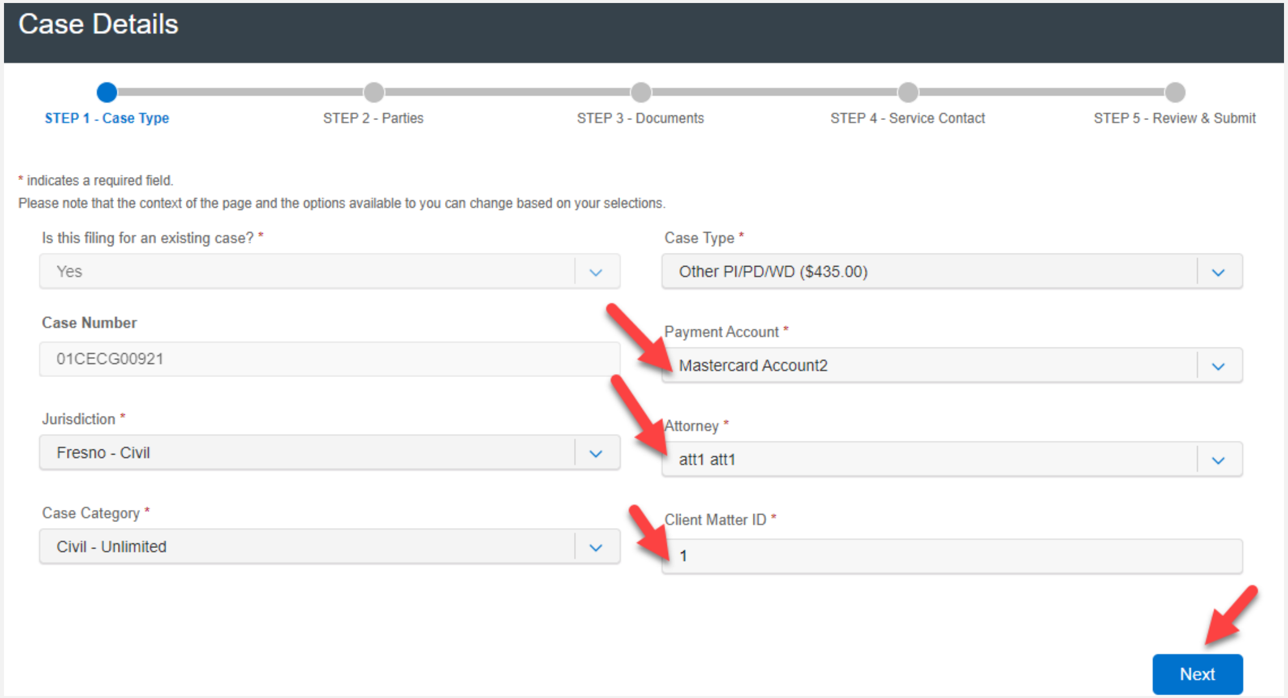






STEP 1 – CASE TYPE

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.



STEP 2 - PARTIES

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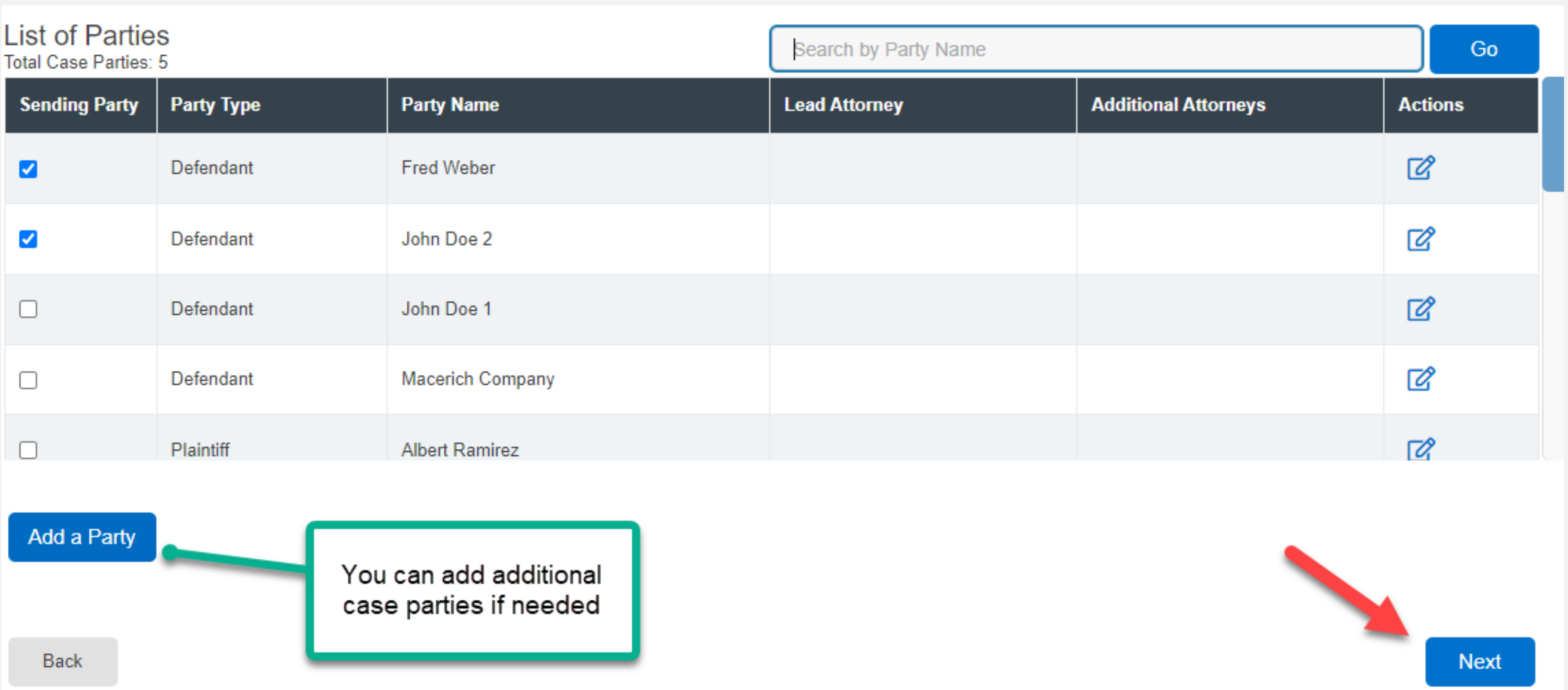
The case parties will also be auto-populated. If you needed to add any additional case parties, you can do so via *Add Party*.



STEP 2 – PARTIES (*continued*)

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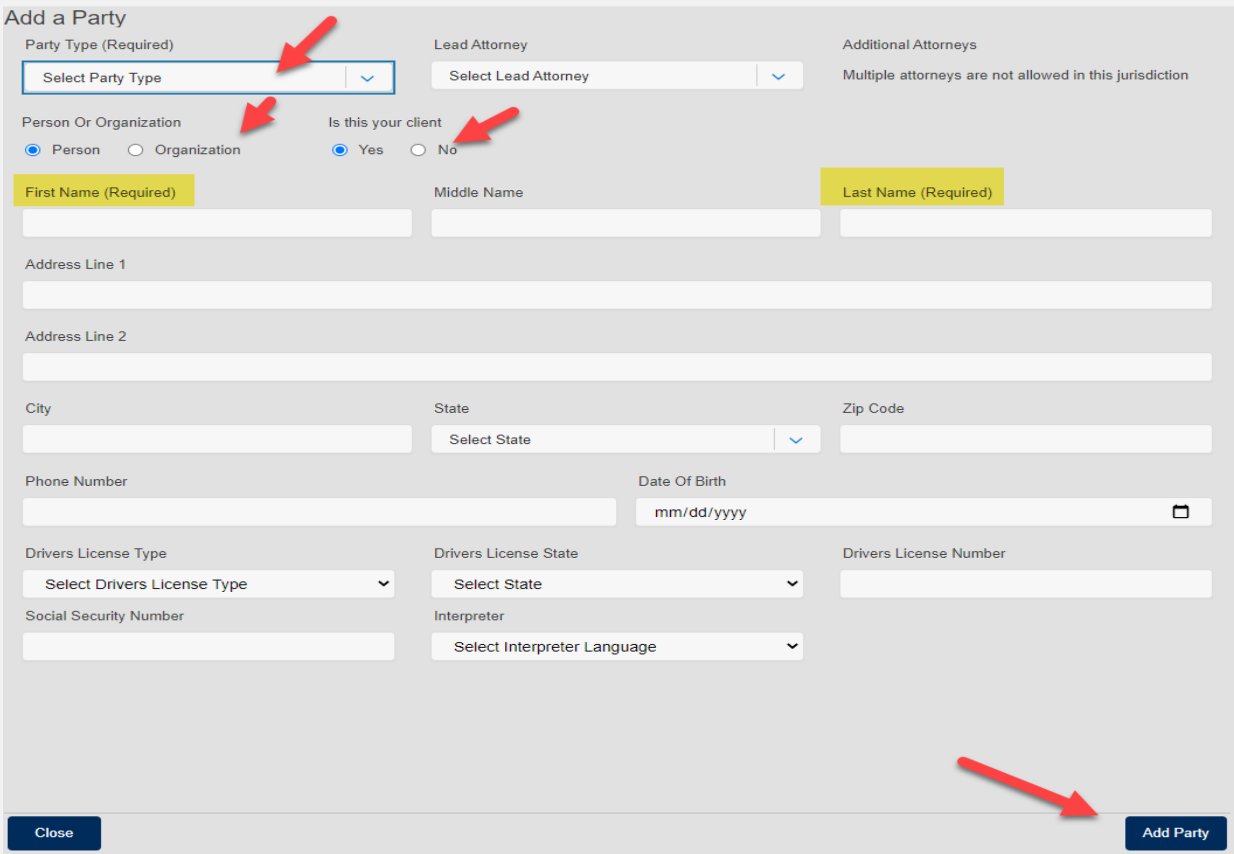
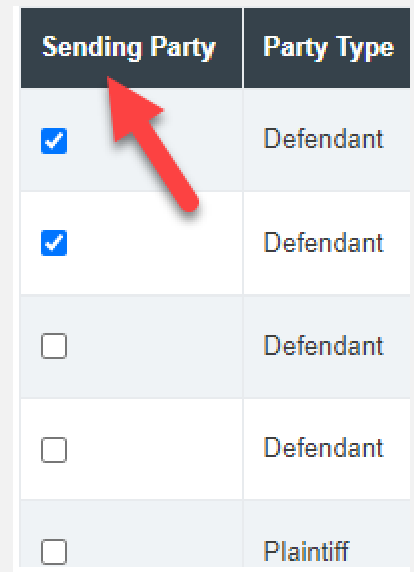
Add Party will open a dialogue box. Enter the necessary information. Click Add Party to add them to the list. Make sure to select a *Sending Party*. Click *Next* to move to Step 3 – Documents.





STEP 3 - DOCUMENTS

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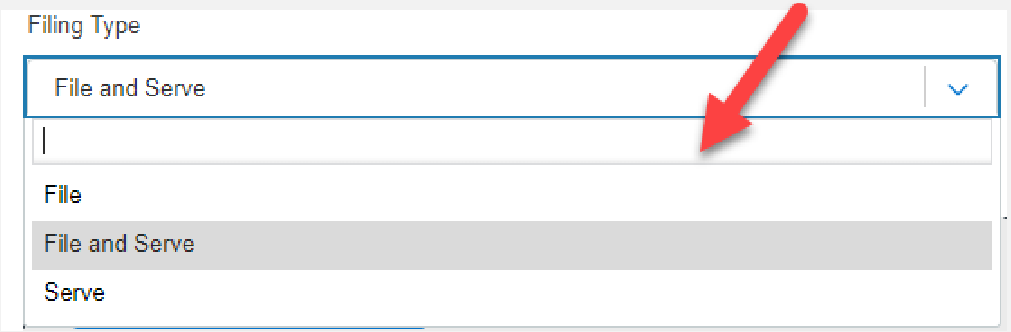
Please refer to the next slides for screenshots illustrating the information below.

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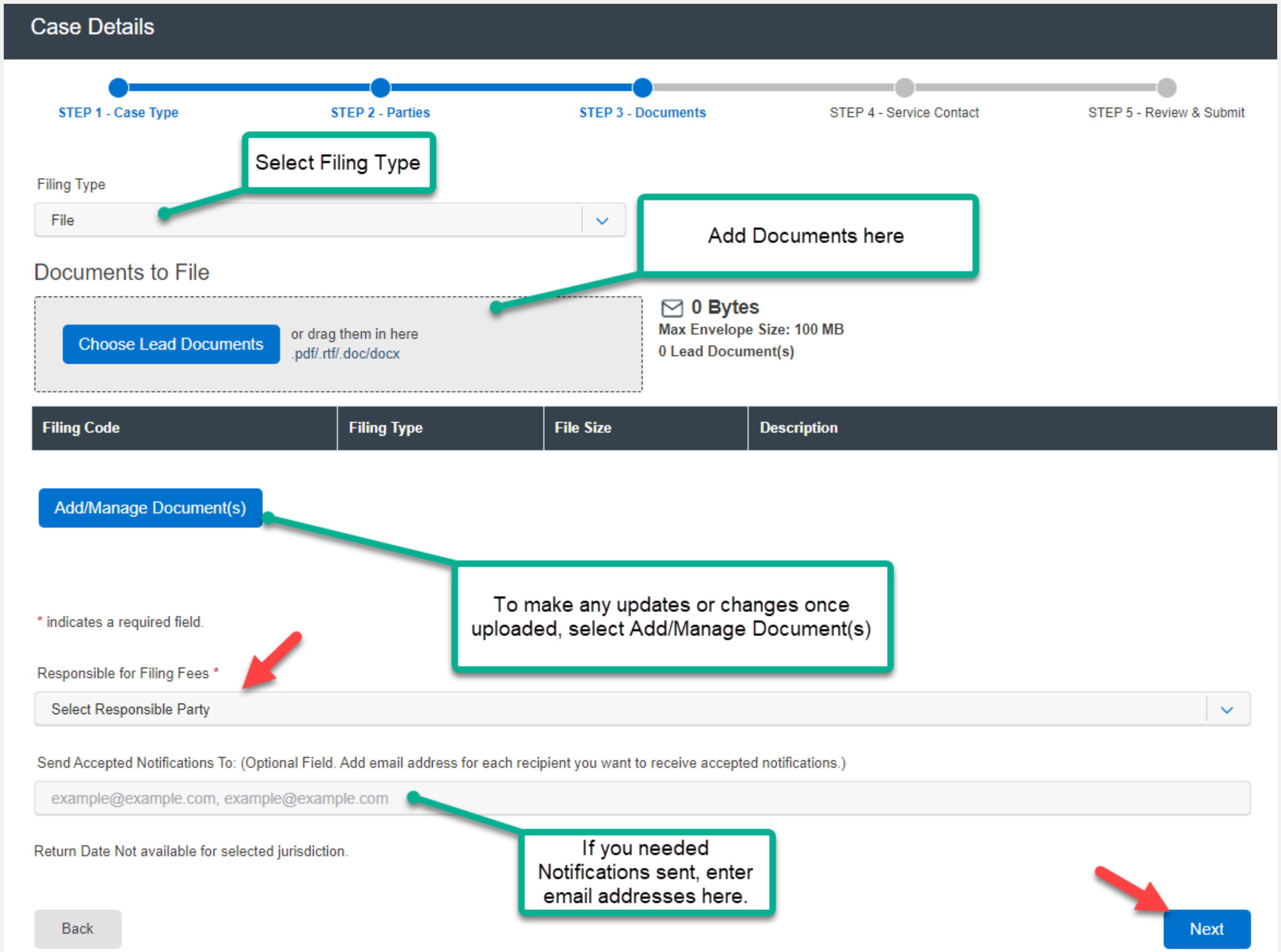
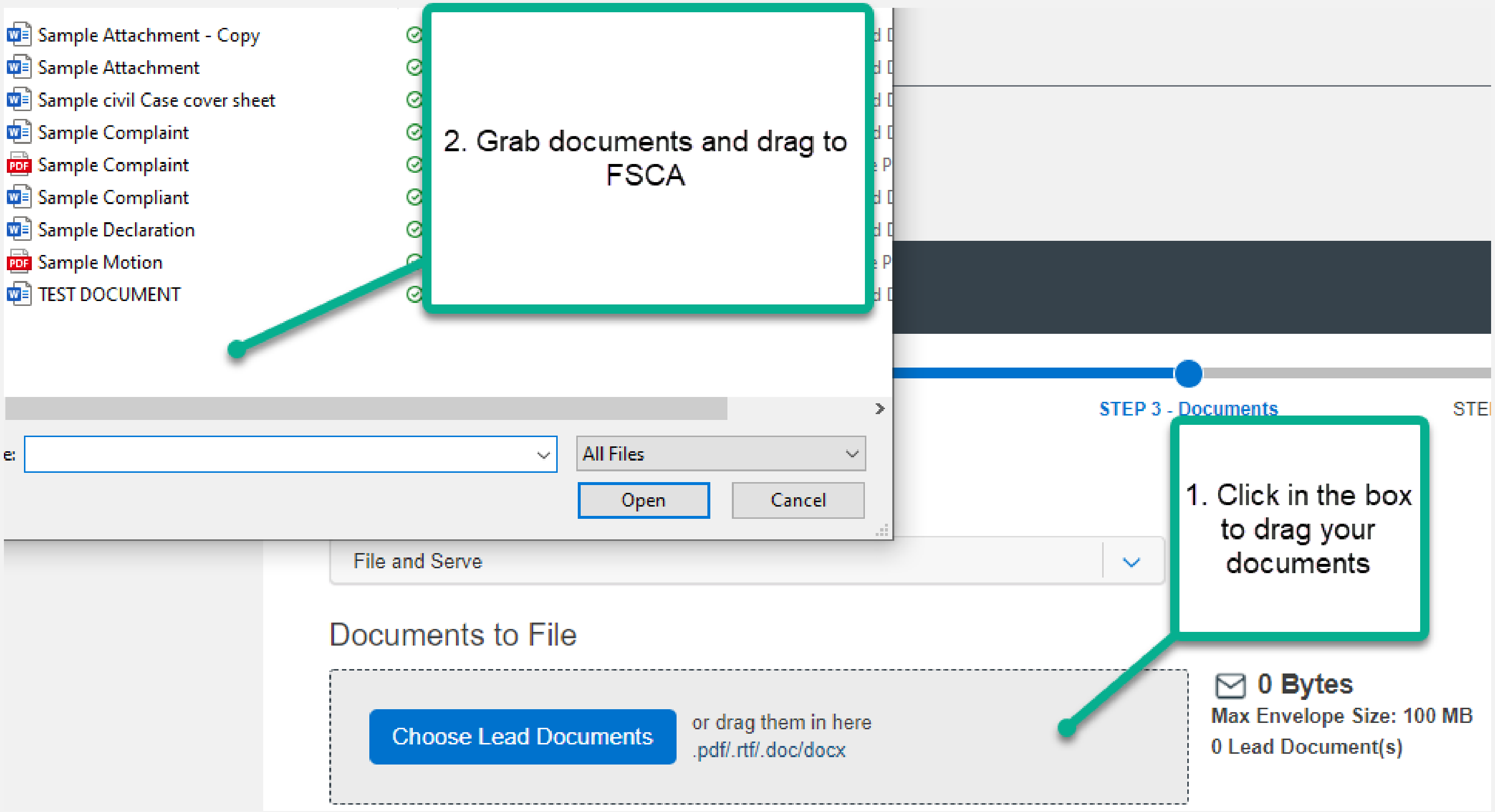


STEP 3 - DOCUMENTS *(continued)*



STEP 3 - DOCUMENTS *(continued)*

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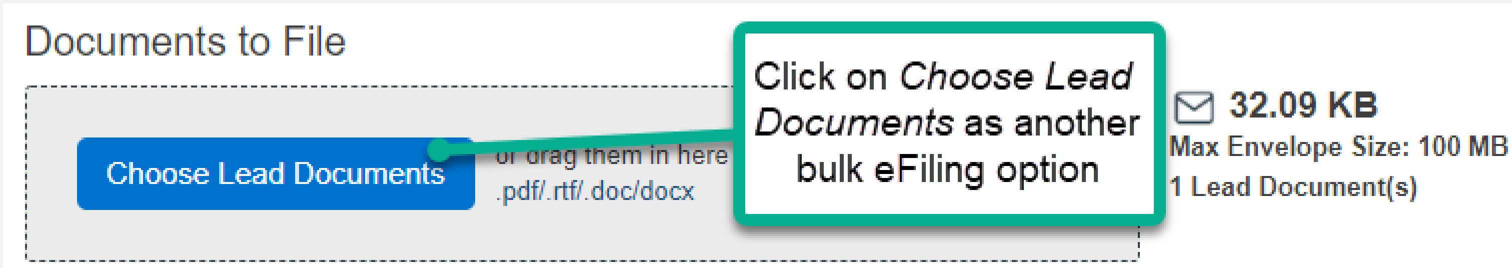

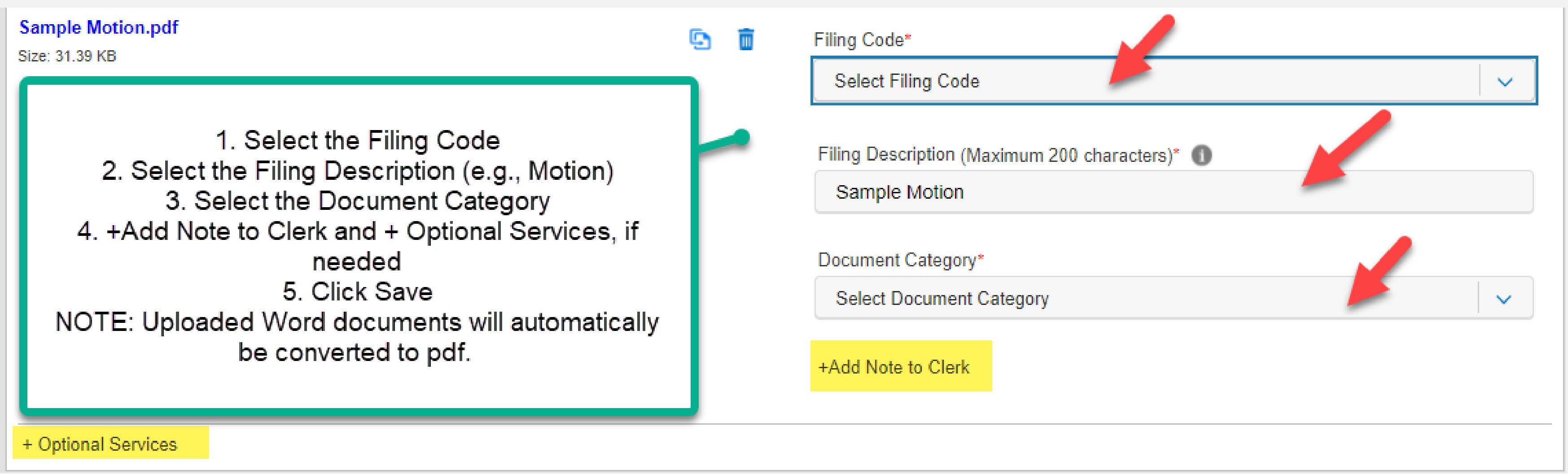

STEP 3 - DOCUMENTS *(continued)*

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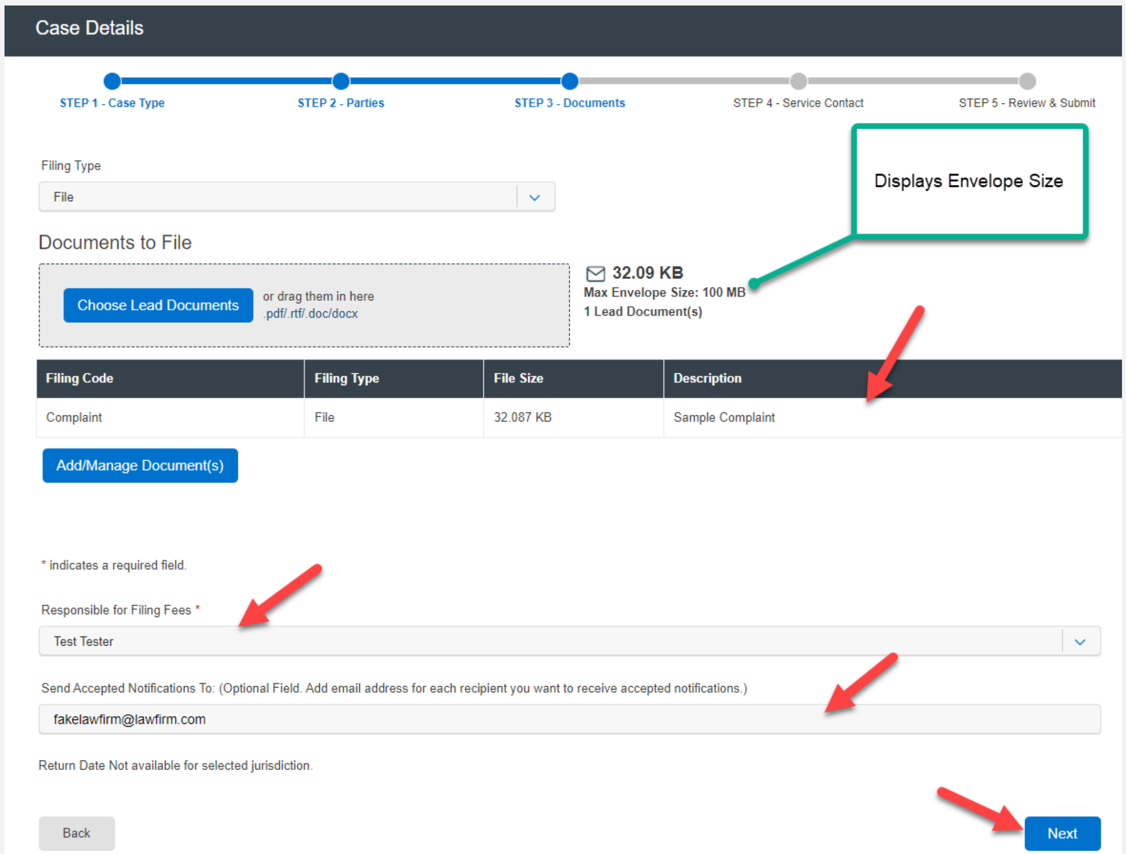
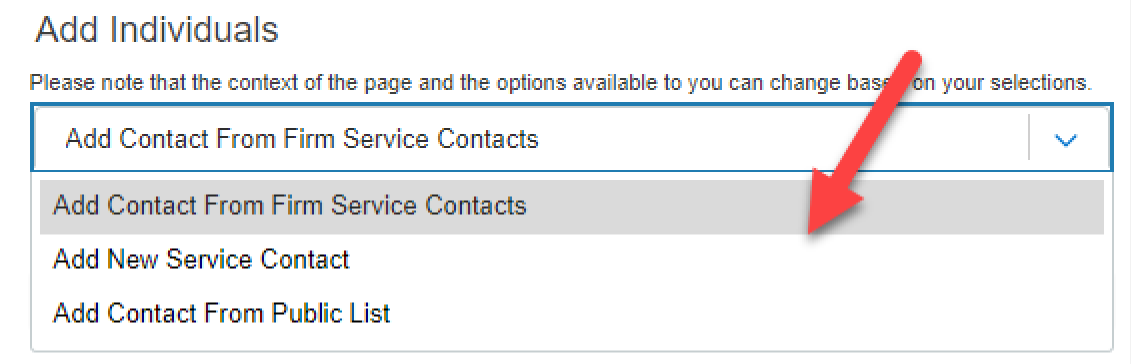
Once you've entered the information for **each document uploaded**, it will bring you back to the Documents tab. Select the party *Responsible for Filing Fees* and any *Notifications*, if desired. Click *Next* to move to Step 4.



STEP 4 – SERVICE CONTACT

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*.



STEP 4 – SERVICE CONTACT *(continued)*

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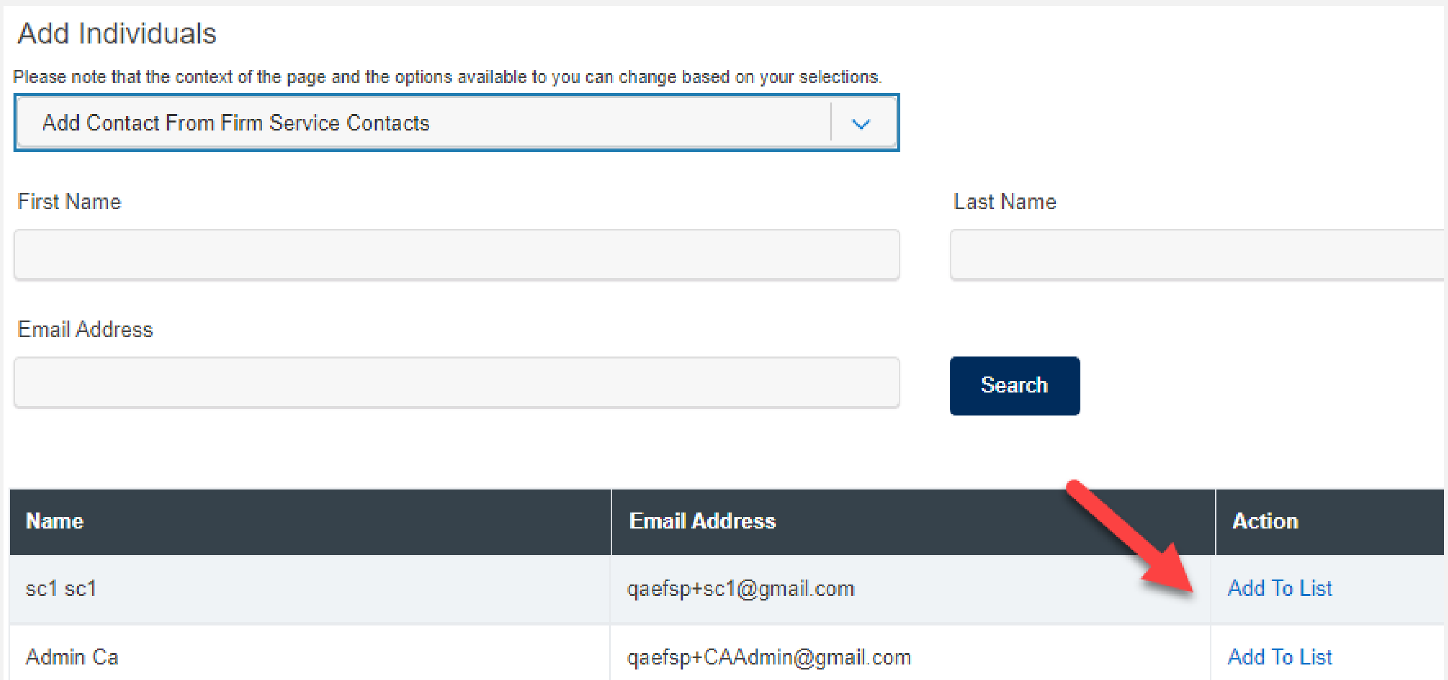
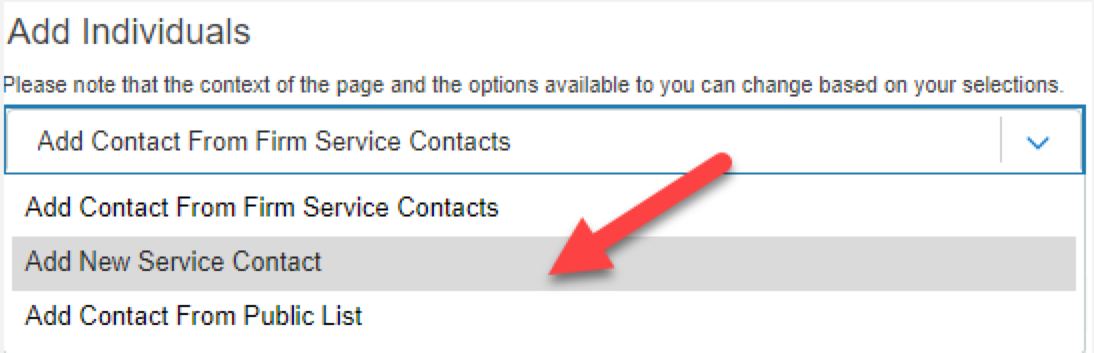
Selecting *Add Contact From Firm Service Contacts*, will display Firm Service Contacts (members of the firm that have been added under Service Contacts). Click on *Add to List* to add them to the Service List.



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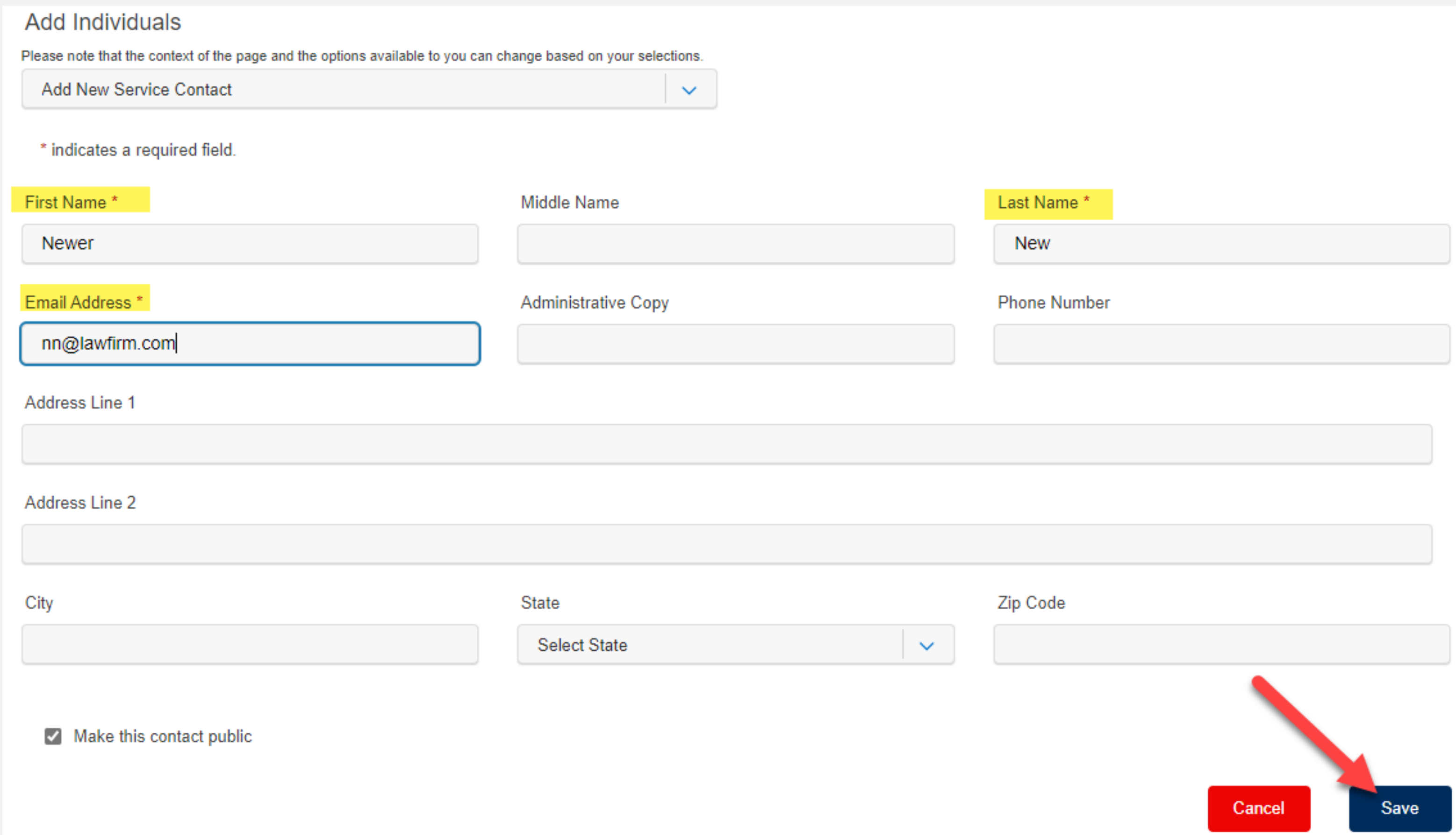
Selecting *Add New Service Contacts*, will prompt you to add their information.



STEP 4 – SERVICE CONTACT *(continued)*

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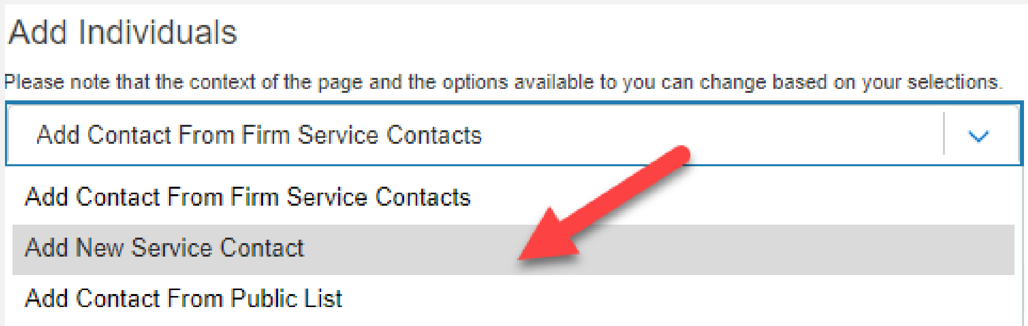
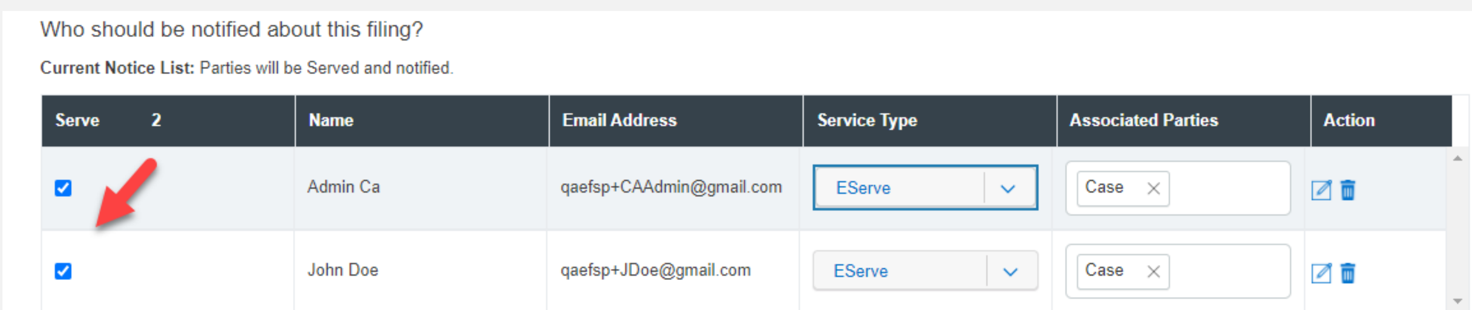
Selecting *Add Contact From Public List*, will prompt you to *search* for opposing counsel from an attorney list provided by the California State Bar. Once found, select *Add to List* to add them to the Service List.



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.



STEP 4 – SERVICE CONTACT *(continued)*

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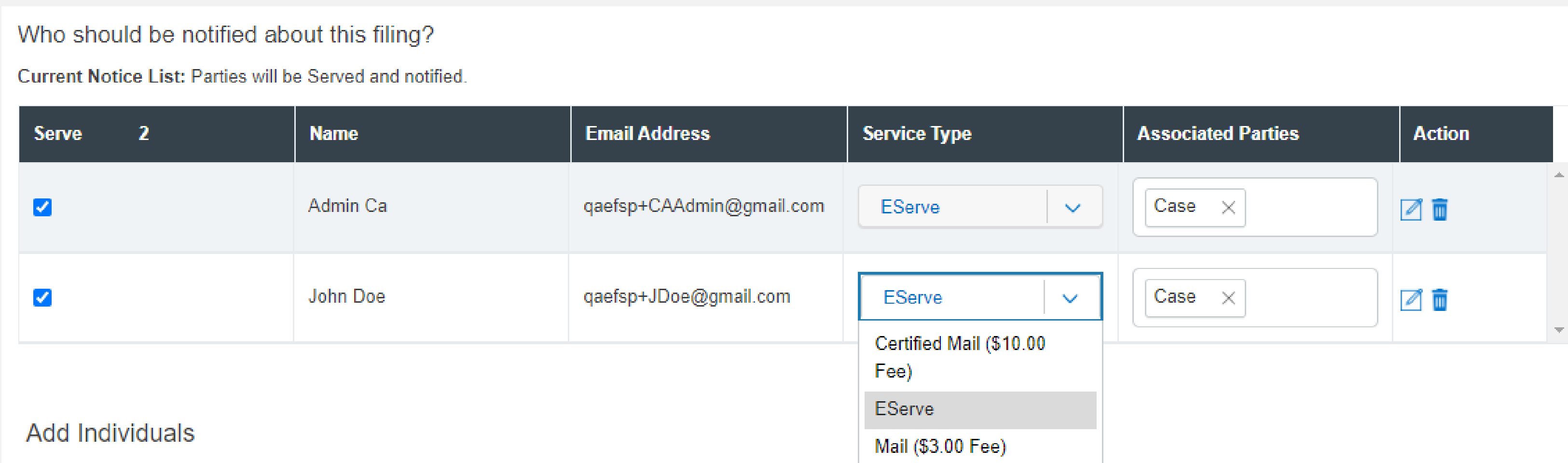
Lastly, under the column *Service Type*, you have the option to send the documents via eService, Certified Mail (fee), or Mail (fee).


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
☑	Admin Ca	qaefsp+CAAdmin@gmail.com	EServe	Case ×	
☑	John Doe	qaefsp+JDoe@gmail.com	EServe	Case ×	

Certified Mail ($10.00 Fee)
EServe
Mail ($3.00 Fee)

Add Individuals

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

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

STEP 5 – REVIEW & SUBMIT

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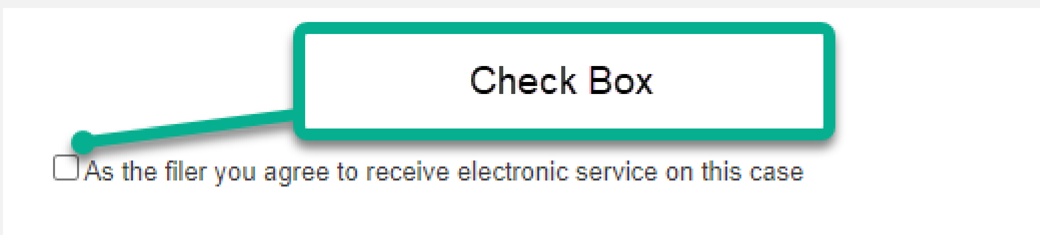
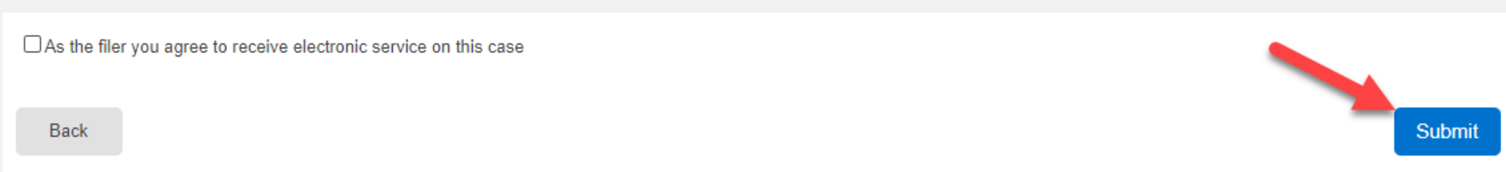
This Step will allow you to review each Step prior to submission to the Court. There is an *edit icon* next to each section/Step if you need to make any changes.

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 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*)

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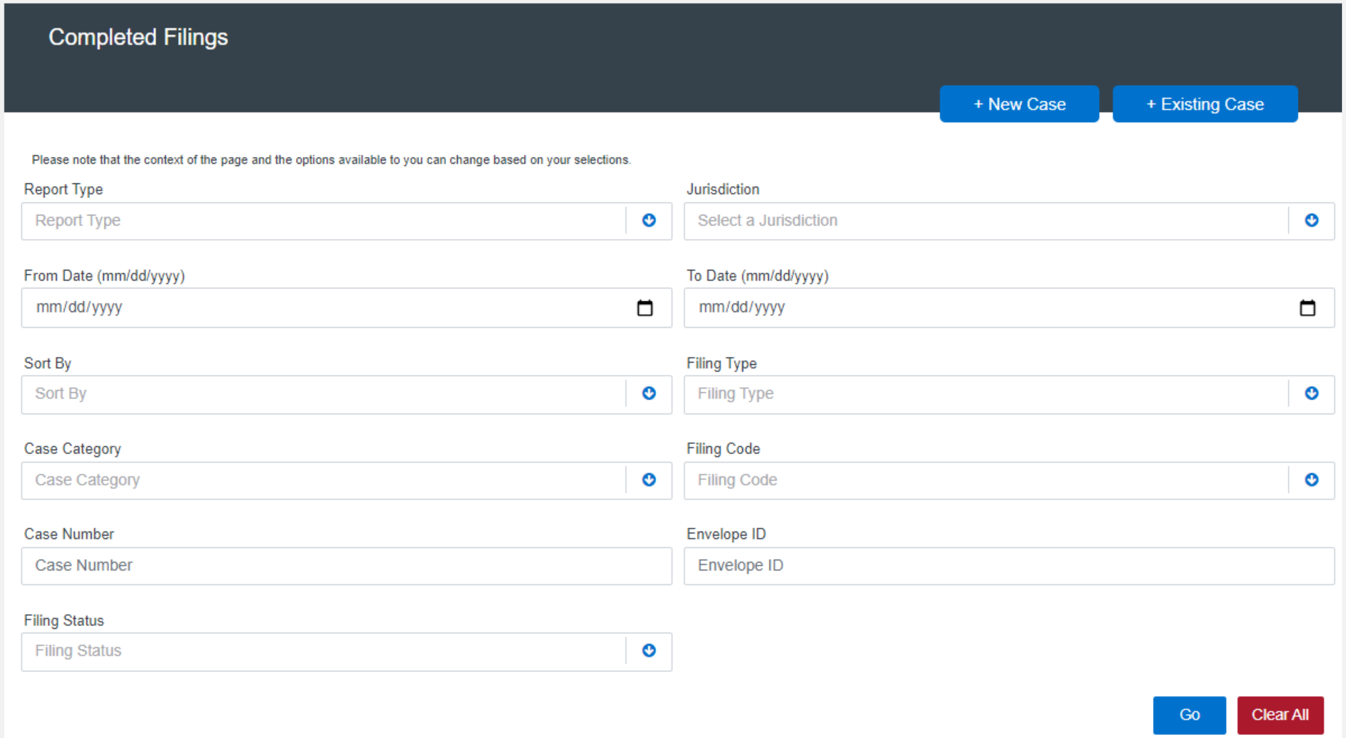
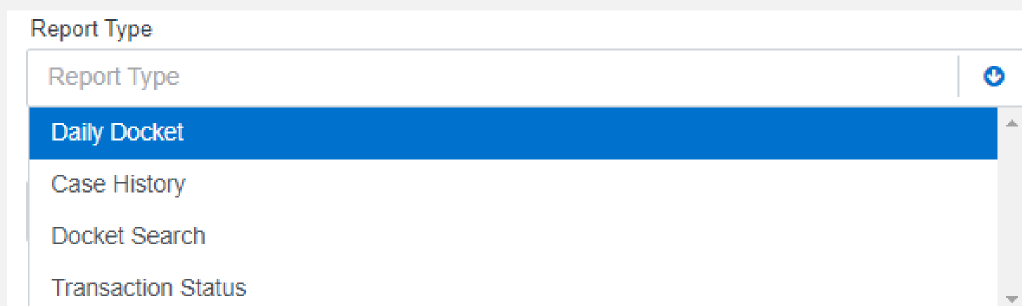


Search capabilities, Report Options (*see,* next slide)



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*)

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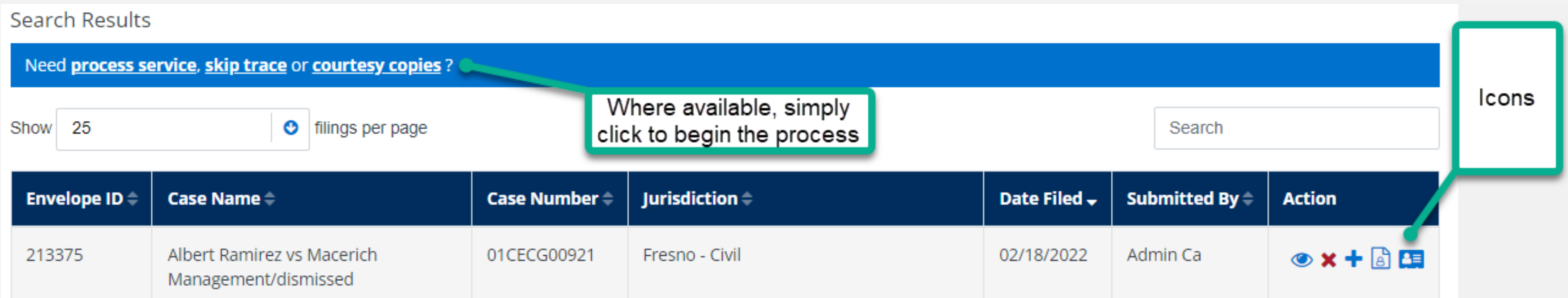
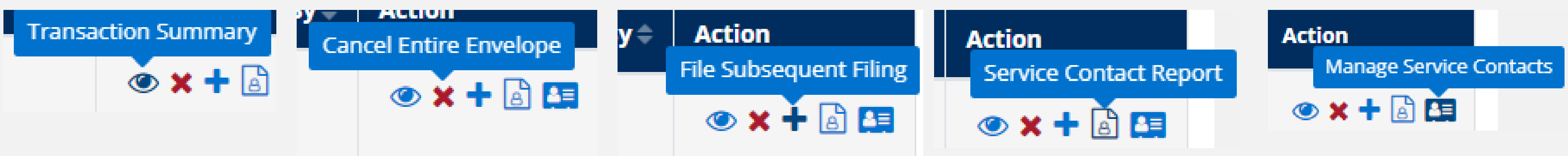


Here, you can view the icons that help streamline your case matters.



COMPLETED FILINGS (*continued*)

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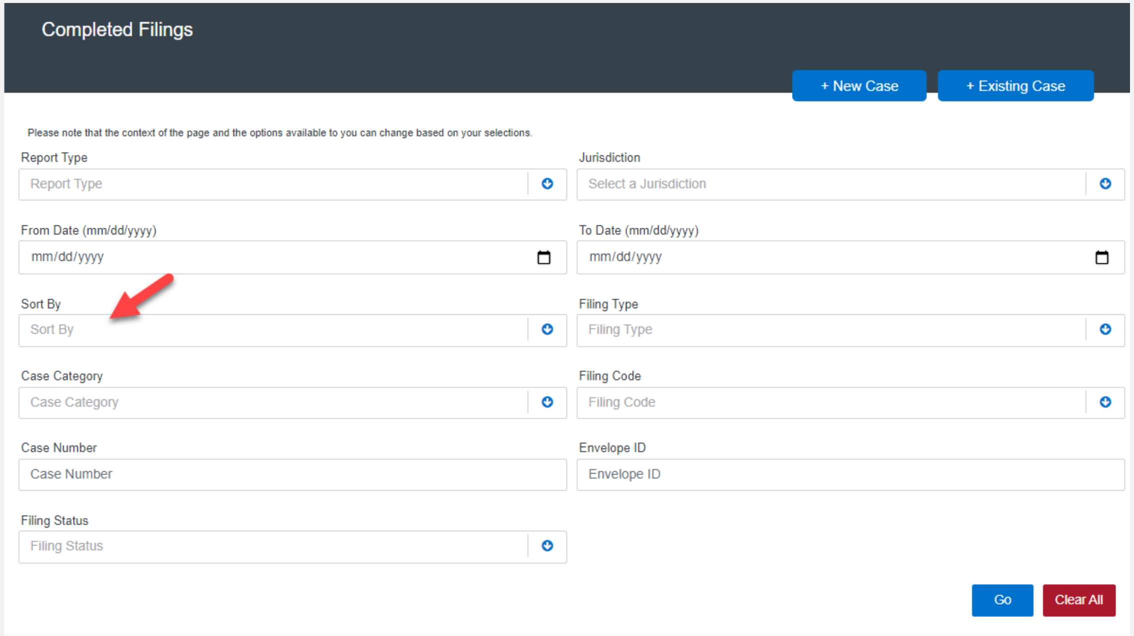
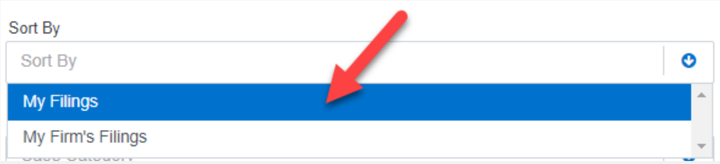
The *Completed Filings* page also allows you to search for **submitted filings** that you, or one of your colleagues, submitted. This option can be found under the *Sort By* drop-down menu.





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 ad 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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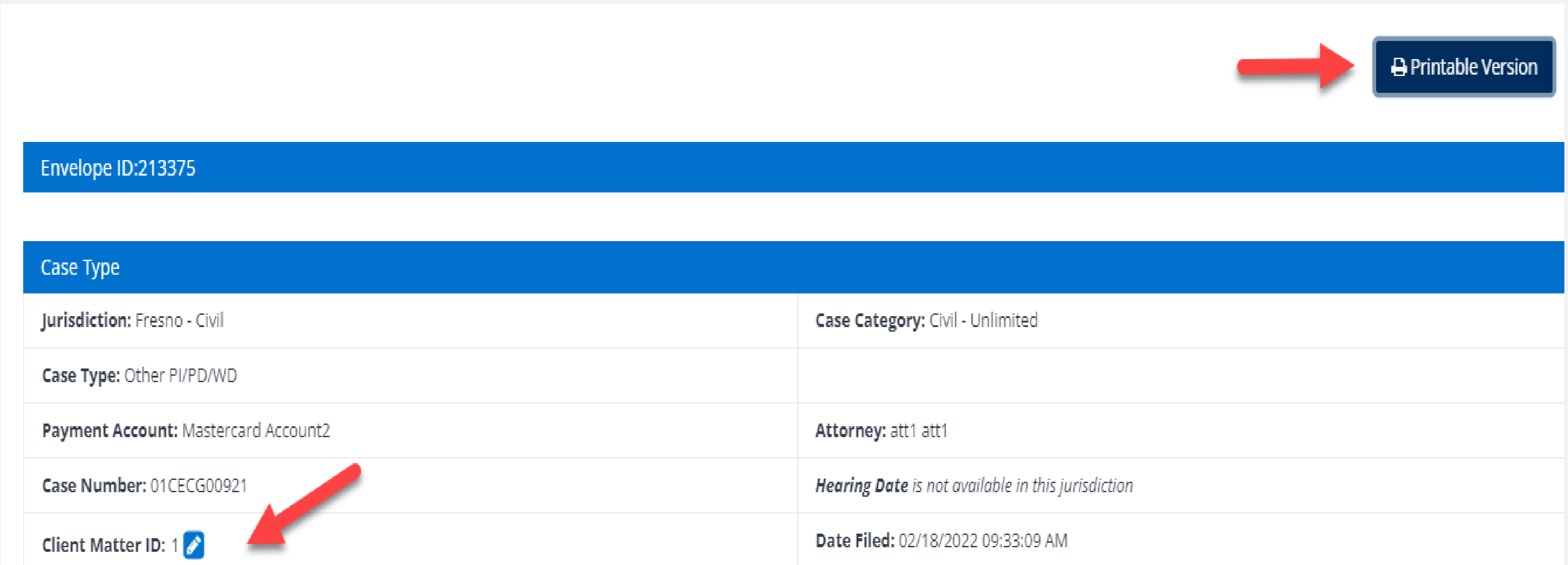

REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS

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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

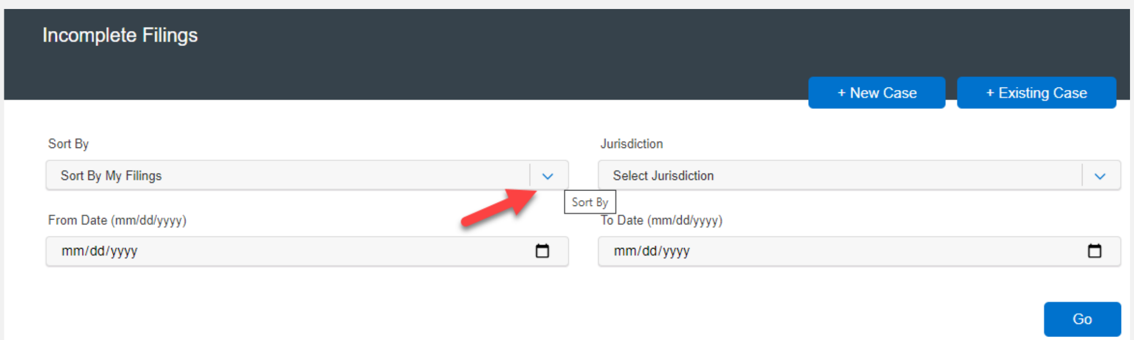
Search

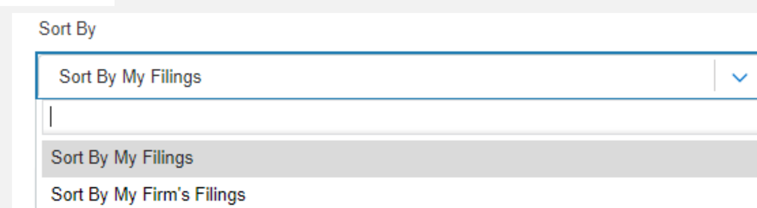
Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
248385	1 PERSON Vs. ORGANIZATION	2021CH00922	Cook County - Chancery - District 1 - Chicago	10/05/2021	Admin 0730	
248384	1 PERSON VS. ORGANIZATION	2021CH00922	Cook County - Chancery - District 1 - Chicago	10/05/2021	Admin 0730	

INCOMPLETE FILINGS

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.





INCOMPLETE FILINGS (*continued*)

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