



CaseFile*Xpress*®

USER GUIDE

Registering to use
CaseFileXpress

CaseFile*Xpress*

Tips & Guidelines

TIPS & GUIDELINES (Slide 1 of 3)

- Login page located at <https://dc.casefilexpress.com/Login.aspx>
- Know your User-ID and Password – case sensitive
- The application is best viewed on IE 6+. Performance of the application cannot be guaranteed with other browsers and operating systems, such as Macintosh Safari.
- To access filing information prior to June 2nd, 2012, contact CFX customer support
- Monitor your courtesy email notifications, as well as your dashboard daily for filing alerts or eservice received
- If needed, filing delegates can be added/removed by your firm admin., the Manage Delegates link on Dashboard, or CFX Customer Support

TIPS & GUIDELINES (Slide 2 of 3)

- The document type list and associated fees are provided/controlled by the clerk's office
- Select the correct document type from drop-down menu for the lead document only
- Do not select document types for any supporting documents
- Save and title your documents reflecting the content of the document (i.e. Motion, Petition, Response, Reply, Answer to Complaint)
- Know your case number – must be entered in an exact format. Check your case number on the court's website:

<https://www.dccourts.gov/cco/>

(*example:* 2012 CA 001234 A)

TIPS & GUIDELINES (Slide 3 of 3)

- Payment is not processed for rejected filings, **but they are not docketed**
- If a filing is 25 pages or more, then a courtesy paper copy shall be submitted to the Judicial Officer presiding over the case
- Social Security and Financial Account Numbers shall be redacted by the filer from filings submitted and, if such numbers are needed, then only the last four digits shall be used unless the document is filed under seal
- If the clerk rejects your filing, please correct based on the clerk's comments and resubmit immediately
- In order to alleviate any unintended burden, cases may be consolidated as appropriate under the rules for purposes of eFiling documents in the lead case and only entering the fact of the filing on the docket in the consolidated, secondary case
- Review and confirm your service list is complete to include the Judge on the case
- The service list is created by our users - always confirm it is correct before submitting your filing

REGISTERING NEW USERS

Common Clerk-Related Rejections

- New users needing an ID and Password for CaseFileXpress need to click the “Register Now” link on the CaseFileXpress Login page.

<https://dc.casefilexpress.com/Login.aspx>

CaseFileXpress Login

User ID:

Password:

Remember Me [?](#) [Login](#)

[Forgot User ID](#) | [Forgot Password](#)

Not registered with CaseFileXpress?

You must register with CaseFileXpress before eFiling with the District of Columbia Superior Court and the Texas State Courts. Our website is best viewed with Internet Explorer 8+ and requires the use of cookies. If you attempt to login and are returned to the login page without seeing an error message, you need to enable cookies. For more information on enabling cookies, click here: [\(Link to enabling cookies.\)](#)

[Register Now](#)

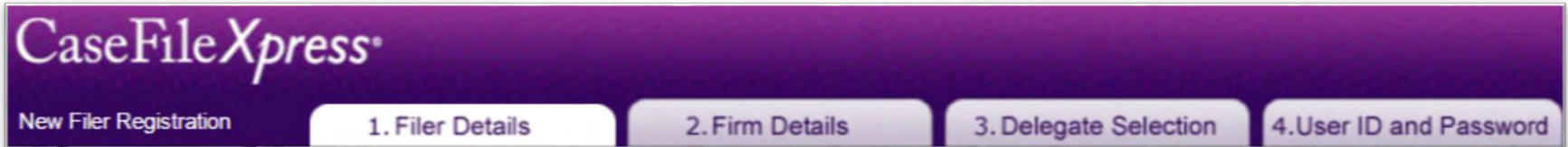
Looking for more information about CaseFileXpress?

[Check out the CaseFileXpress latest Tips and Guidelines.](#)

- After clicking on “Register Now” a series of four tabs open.

USER TYPES

- The first tab is for **Filer Details**

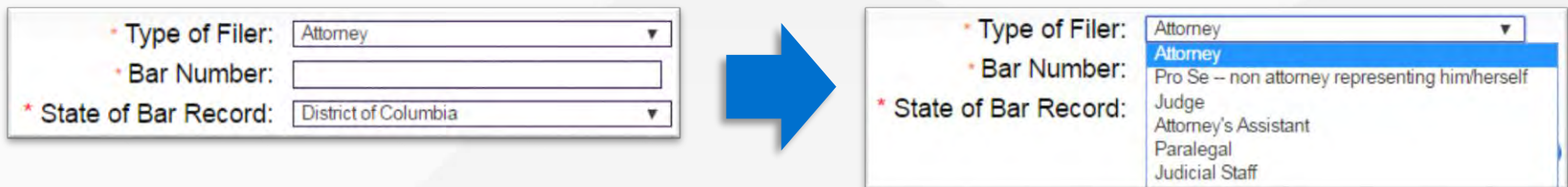


CaseFile Xpress®

New Filer Registration

1. Filer Details 2. Firm Details 3. Delegate Selection 4. User ID and Password

- After entering their name and email address, users will designate the type of filer they wish to register as.



* Type of Filer: Attorney

* Bar Number: []

* State of Bar Record: District of Columbia

* Type of Filer: Attorney

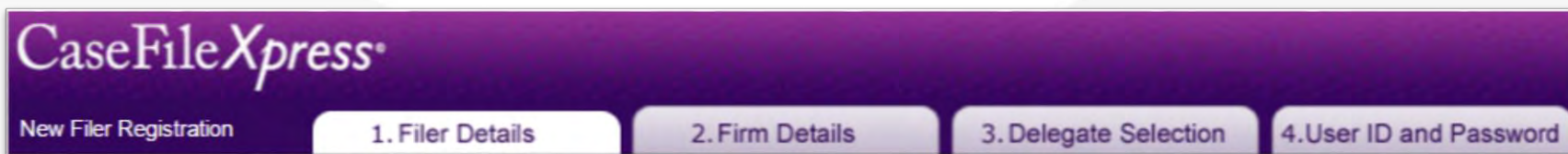
* Bar Number: []

* State of Bar Record: []

- Attorney
- Pro Se -- non attorney representing him/herself
- Judge
- Attorney's Assistant
- Paralegal
- Judicial Staff

- If registering as an **Attorney**, a Bar Number must be entered. Partner agencies may obtain these from the court staff.
- If registering as an **Attorney's Assistant** or **Paralegal**, a Bar Number is not needed, but the user will need to be designated as a **Delegate** for another user who is designated as an **Attorney** in order to be able to file.
- Each case will have a "Filing Attorney". **Delegates are able to file into that case if they are designated as a Delegate for the Filing Attorney on the case.**

FIRM REGISTRATION CODE



- Each Organization creates a Firm Registration Code. **It is crucial for each user in that Organization to enter the Firm Registration Code during the registration process.** This ensures that the user will be associated with the correct Organization. Client Support can provide the Code if the new user cannot find it. Once the code is entered, press the Tab key for validation, and once validated the “Office Selector” pull down menu will appear. The appropriate office must be selected.

If the user fails to enter the Firm Registration Code they may end up creating a *personal* account for which they will be billed accordingly.

Type of Filer: Paralegal

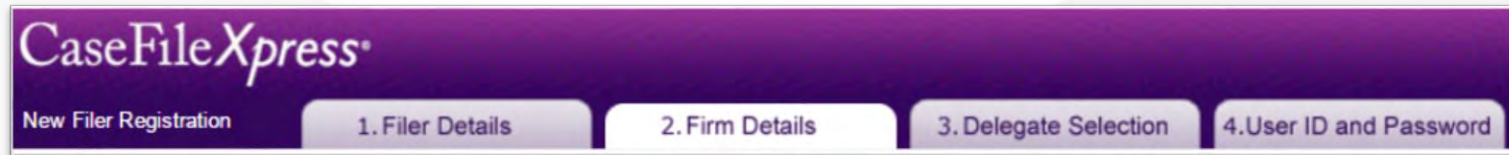
Participate in eService ?

Court Clerk may change my document type ?

Firm Registration Code: ?

Office Selector: - Select -

FIRM DETAILS



- If the new user is registering as part of an Organization which already has an account, and if they enter the Organization's Firm Registration Code, the Firm Details tab will be skipped. If the user registering is the first to register for their Organization they will need to enter the firm details on this screen. They will also create a firm registration code.

Firm Details

Law Firm or Organization:

Website:

Manager Account?

Multiple Offices? [Add office](#)

Practice Type:

Firm Registration Code:

Managing Partner Name:

Managing Partner Phone Number: - -

Managing Partner Email:

Primary Office Name:

Address Line 1:

Address Line 2:

City:

State:

Zip:

Law Firm Contact Person:

Law Firm Contact Person Email:

Law Firm Contact Number: - -

Law Firm Fax: - -

Time Zone:

Primary Accounting Contact:

Contact Number: - -

Contact Email:

Secondary Accounting Contact:

Contact Number: - -

Contact Email:

Authorizer Name:

Authorizer eMail:

Firm User Agreement

Firm Agreement:

Case File Xpress Firm User Agreement

By clicking "I accept" with respect to this Case File Xpress Firm User Agreement (this "Agreement"), agrees to be bound by the covenants and agreements herein, in return for be granted access the Case File Xpress ("CFX") application to utilize the eFiling and eService services available in the application. Clicking the "I accept" button is a symbol of the signature of the Firm's authorized representative accepting the terms of the Agreement.

1. Account.

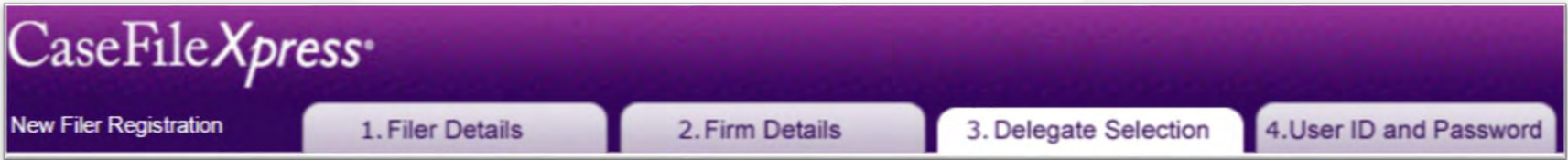
(a) Firm shall have an account (the "Account") with CFX for use of the CFX website (the "Website") and CFX web-based eFiling services in accordance with the End User Agreement set forth on the website.

(b) Each attorney who is a partner, member or associated with Firm shall have an individual registration through Firm's Account (each a "Firm Attorney"). Firm shall provide for each Firm Attorney the information required by the Website for registration of such Firm Attorney. Each Firm Attorney registered with CFX through Firm must be an attorney in good standing in their respective states in which they are practicing. CFX shall promptly terminate a Firm Attorney's registration upon notice by the Firm to such effect.

(c) Firm shall be responsible for all charges incurred by any Firm Attorney (or any representative or assistant of the Firm or of any Firm Attorney) with CFX through the Website or otherwise.

(d) Firm shall notify CFX of any discrepancies or irregularities on a billing for service within ninety (90) days of the delivery of such service. If Firm does not notify CFX of a discrepancy or irregularity within such 90 day period, Firm may not challenge the validity of such

DELEGATE SELECTION



- If the new user is registering as a **non-“Attorney”**, they will be able to select the “Attorney(s)” from their organization they wish to be Delegates for. A list of currently registered Attorneys will appear on the left. The new user will click on the Attorney(s) name(s) for whom they wish to be Delegates for, then click Add in the middle of the screen to create/add them to a list shown on the right side of the screen.

Below is a list of all eligible filers from all of your defined Locations.

Search: Last Name First Name Office

Available Attorneys

Select	Name >>	Filer Type >>	Office >>
<input type="checkbox"/>	Attorney, Bob	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Attorney, Test	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Austin, Gina	Attorney	CaseFileXpress, LP

Can't find who you are looking for? Enter email below to send them an invitation to register with CaseFileXpress.
Enter Email:

Attorneys List

Select	Name >>	Filer Type >>	Office >>
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DELEGATE SELECTION

- If the new user is registering as an **"Attorney"**, they will be able to select the other **"Attorney(s)"** they wish to be Delegates for and the Delegates who will be able to file on their behalf. A list of Attorneys and a list of Delegates will appear. The new user will click on the Attorney(s) name(s) for whom they wish to be Delegates for and the Delegates who they wish to be able to file on their behalf, to create/add them to a list.

CaseFileXpress
New Filer Registration

1. Filer Details 2. Firm Details 3. Delegate Selection 4. User ID and Password

Select Firm Delegates ?

Below is a list of all eligible filers from all of your defined Locations.

Search: Last Name First Name Office Go

Can't find who you are looking for? Enter email below to send them an invitation to register with CaseFileXpress.
Enter Email:

Available Attorneys ?

Select	Name >>	Filer Type >>	Office >>
<input type="checkbox"/>	Attorney, Bob	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Attorney, Test	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Austin, Gina	Attorney	CaseFileXpress, LP

Available Delegates ?

Select	Name >>	Filer Type >>	Office >>
<input type="checkbox"/>	Attorney, Bob	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Attorney, Test	Attorney	CaseFileXpress, LP
<input type="checkbox"/>	Austin, Gina	Attorney	CaseFileXpress, LP

Attorneys List

Select	Name >>	Filer Type >>	Office >>
<input type="button" value="Add >>"/>			
<input type="button" value="<< Remove"/>			

Delegates List

Select	Name >>	Filer Type >>	Office >>
<input type="button" value="Add >>"/>			
<input type="button" value="<< Remove"/>			

USER ID AND PASSWORD



- Users are able to create their own User ID and Password. If uppercase letters are used they must also be entered to login. Users will also pick challenge questions to be able to retrieve their login credentials.
- NOTE:** If you are registering as an Attorney, the User ID you create is what will be shown on the Filing Attorney menu for selection by your filing Delegates when they file on your behalf. **It may be best to use all or part of your name as your User ID.**

The 'Login Credentials' form. It includes fields for 'Create User ID' (highlighted with a red box), 'Create Password', and 'Re-Enter Password'. Below these are 'Challenge Questions' with three dropdown menus for questions and text boxes for answers.

The 'Submit New Filing' form, step 1: 'Enter Filing Information'. It includes a 'Filing Type' section with radio buttons for 'eFile and eServe' and 'Discovery Service'. Below is a 'Filing Details' section with a 'Filing Attorney' dropdown (highlighted with a red box), 'Jurisdiction', and 'Court Assignment'. A red callout box points to the 'Filing Attorney' dropdown with the text 'Attorney User ID's will be listed here'. A red arrow points from the 'Create User ID' field in the previous form to this dropdown.

GOVERNMENT AND AGENCY PARTNERS ACCOUNT(S) SETUP

- Government and Agency partner users should make sure that they are associated with the correct accounts when they register to avoid inadvertently setting up their own account. Entering your organization's "firm registration code" during the registration process will ensure that you are associated with the correct account. Contact your CFX Firm Manager or Client Support if you need the code.
- The filing workflow screens will differ for government and agency partner accounts so it is crucial that they be set up and designated appropriately.
- Please contact Client Support with questions about accounts or registering.

CJA ATTORNEYS - ACCOUNT(S) SETUP

- Please remember that you **must** establish separate user accounts for CaseFileXpress for your cases in which filing fees are **not** owed (e.g. CJA cases) and your other cases in which fees **are** owed. You should use a CJA account **only for filing in court-appointed cases, and you should add “CJA” to the account name for that account (modify your account name if you already set one up without adding “CJA”)**. You must register separately for another account as a private attorney for all other filings with the court. Use this format: **ORGANIZATION NAME (CJA)**
- Please also note that creating a new account with the CJA designation or modifying an existing account to do so is **not** enough. *Contact CaseFileXpress client support to tell them that the account is CJA.*
- You **should not** use your CJA account to efile in Probate, Civil, Tax and Domestic Relations cases. If you are representing indigent clients in these cases you will need to apply for in forma pauperis (IFP) status in order for court fees to be waived.
- Do **NOT** use the DC Superior Court firm code to register! You are **NOT** allowed to be part of their account and will be removed from the system immediately.

Contact CaseFileXpress

- ✓ Toll Free: 877-433-4533 or 877-I-eFiled
(24x7 phone support)
- ✓ LiveChat
(during business hours 8am – 6pm ET)
- ✓ Send us an email:
info@fileandserve.com
- ✓ Our Home Page:
<http://fileandservexpress.com/dc>
- ✓ Login Here:
<https://dc.casefilexpress/>