

File & Serve *Texas*™

USER GUIDE
New Case Filings

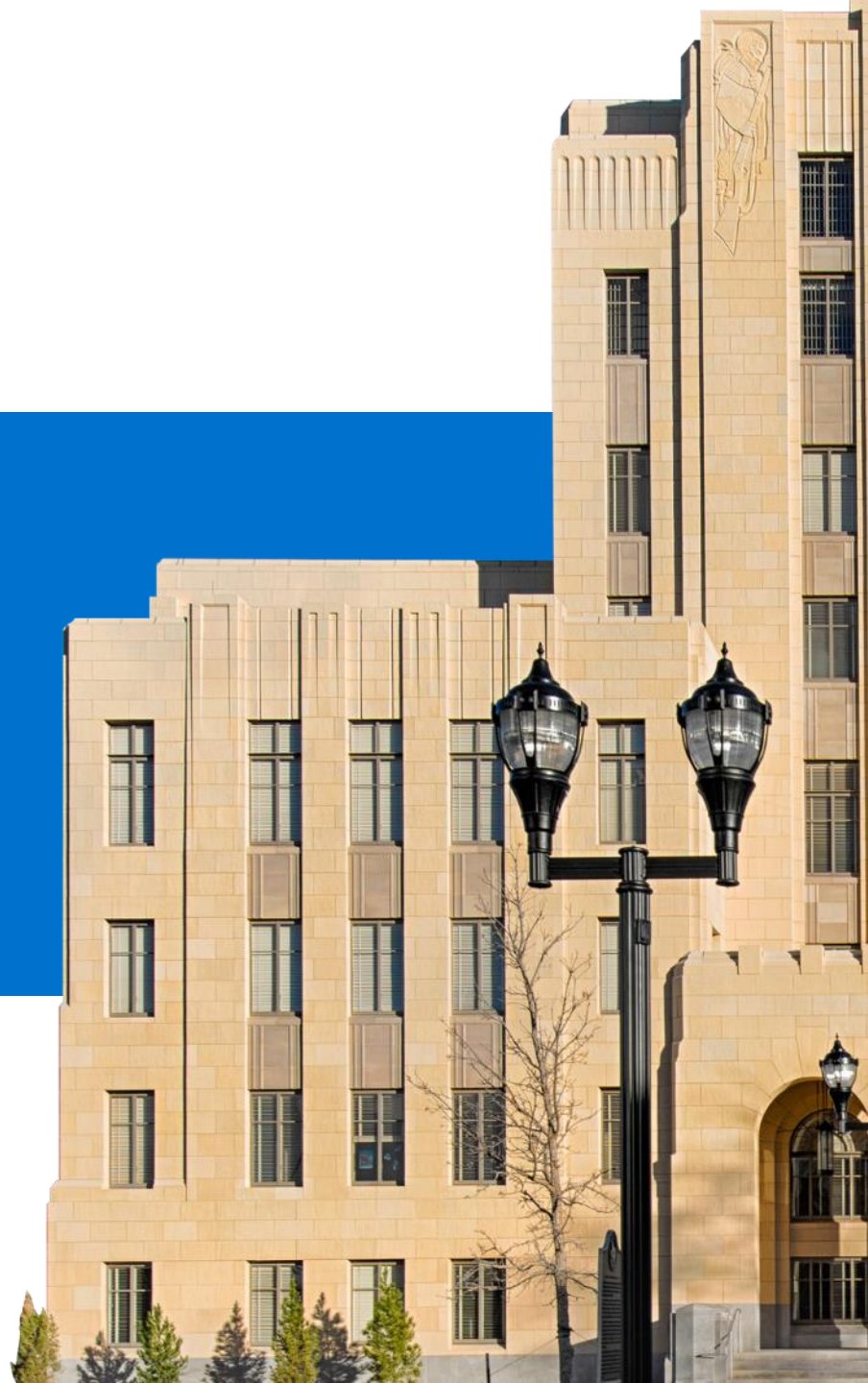


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File & Serve*Texas*

New Case Filing

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File & Serve *Texas* has many resources available to you in order to address your questions and concerns:

- **File & Serve *Texas* 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.
- **File & Serve *Texas* Resource Center** is available to assist you with How-To Guides, register for Live Webinars, watch On-Demand videos, and much more! Please visit <http://www.fileandservexpress.com/texas/trainingresources.html> for more information.

NEW CASE FILING OVERVIEW

The File & Serve *Texas* User Guide provides a convenient source of information to help you efficiently e-File a new case.

Before You Begin

1. Refer to the appropriate court rules on electronic filing prior to using File & Serve *Texas* to ensure that you are in compliance with local requirements.
2. Check our minimum system requirements to be sure your computer is correctly configured for using File & Serve *Texas*.
3. If you need assistance, call our Client Support line at 1-888-247-2051. They are available to help you 24/7/365.

Logging in to File & Serve *Texas*

The screenshot displays the login interface for File & Serve Texas. It features two input fields: 'Email' with an envelope icon and 'Password' with a lock icon. Below these fields is a prominent blue 'Login' button. At the bottom of the form, there are two links: 'Forgot Password' and 'Register Now'.

1. Open IE, Chrome, or Firefox and go to www.fileandservetexas.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 File & Serve *Texas* login page via www.fileandservetexas.com
2. Enter your Username/Password and click “**Login**”.

The screenshot displays the File & Serve Texas website interface. At the top, a blue navigation bar contains the logo 'File & Serve Texas™', links for 'Home', 'Training', and 'Contact Us', and a 'Login to File & ServeXpress' button. The main content area features a large banner with a background image of a building. On the left side of the banner is a white login form with the following elements: an 'Email' label above a text input field containing 'Email ID', a 'Password' label above a text input field containing 'Password', a blue 'Login' button, and links for 'Forgot Password' and 'Register Now'. To the right of the form, the text 'Welcome to eFiling and eService in Texas' is displayed in white. Below the banner, the text 'THE FASTEST WAY TO FILE' is shown, followed by the instruction 'For more information about eFiling in Texas please [click here.](#)'. On the right side, there is a blue 'System Notifications' button and a 'Read more.' link.

GETTING STARTED *(continued)*

- Once you are logged into your account, you will be taken to Case Details page to begin your filing. The 5 steps to complete and submit a filing will be displayed. Or, you will be taken to the Incomplete Filings page if you have any unfinished filings to complete and submit.
- You may begin the new filing by entering the information into the fields. Or, if you are on the Incomplete Filings page, or the Completed Filings page you can, (a) select “Submit a New Filing” from the Filing drop-down menu, or (b) select the “+New Filing” button. Both will take you to the Case Details page to begin the filing. Please see next slide for screen shots.

File & Serve Texas™

Login to File & ServeExpress

Filing ▼ Firm Admin ▼ User profile ▼ Log Out

Case Details

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

Is this filing for an existing case?
No ▼

Jurisdiction
Select ▼

Filer Type
Select ▼

Case Category
Select ▼

Case Type
Select ▼

Payment Account
Select ▼

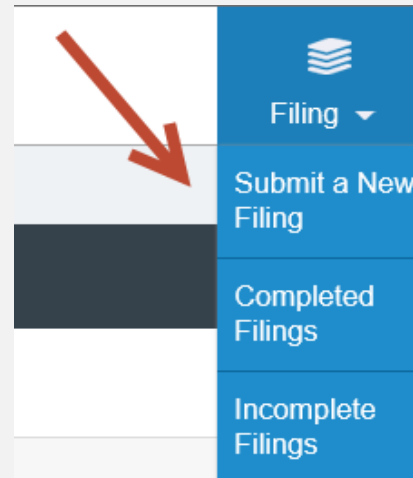
Attorney
Select ▼

Client Matter ID

Next

GETTING STARTED *(continued)*

If you are on the Incomplete, or Completed, Filings page you can begin a filing by clicking on the Filing drop-down menu and selecting “Submit a New Filing”, or clicking the “+New Filing” button.



FILING A NEW CASE:

Step 1 – Case Type

To file a new case using File & Serve Texas, follow these steps:

1. Leave the selection as “No” for the question, “Is this filing for an existing case?”.
2. Select the Jurisdiction. **Note:** *You can type into this field.*
3. Select the Filer Type.
4. Select the Case Category.*
5. Select the Case Type.
6. Payment Account: This will be auto-populated to the default payment account chosen by your Firm Administrator. If you need to select Waiver, please click on the drop-down menu and make the selection. If you do not see a “Waiver” option, please contact your Firm Administrator. See screen shots on next slide.

Case Details

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

Is this filing for an existing case?
No

Jurisdiction
Travis County - District Clerk

Filer Type
Not Applicable

Case Category
Civil - Other Civil

Case Type
Other Civil (\$307.00)

Procedure Remedy

Payment Account
Mastercard

Attorney
Ron Brown

Client Matter ID
abc-123

Next

***Additional fields may populate on the right-hand side of the page depending on the jurisdiction. Click “Next” to see the required fields indicated by a red lined box. See screen shot below.**

FILING A NEW CASE: 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

Is this filing for an existing case?
No

Jurisdiction
Harris District Clerk – Civil

Filer Type
Attorney

Case Category
Civil - Other Civil

Case Type
Other Civil (\$0)

Damage Amount
Less than \$100,000 and non-monetary relief

Procedure Remedy

Payment Account
Mastercard

Attorney
Select

Client Matter ID

Next

Payment Account

Mastercard

Select

Mastercard

Waiver Account

FILING A NEW CASE: Step 1 – Case Type *(continued)*

To file a new case using File & Serve Texas, follow these steps:

7. Select the Attorney that will be authorizing this transaction.
8. Enter your Client Matter ID.
9. Click **“Next”** to move to Step 2-Parties and gain the ability to toggle between Steps 2-5. The system will be auto-saving the information as you click **“Next”** or when you select a **“Step”**. Please see next slide.

Case Details

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

Who are the parties?

Create New Parties

Party Name

Go

List of Parties

Total Case Parties: 2

Sending Party	Party Type	Name	Actions
<input checked="" type="checkbox"/>	Appellee	Not So Funny Business	
<input type="checkbox"/>	Appellant	Funny Business	

Back Next

FILING A NEW CASE:

Step 1 – Case Type *(continued)*

TOGGLING BETWEEN STEPS

10. Once you click “**Next**” on Step 1-Case Type, you will be allowed to toggle between Step 1, Step 2, Step 3, Step 4, or Step 5 in any order of your choice.

Example: You have completed Step 1-Case Type and clicked “Next”. You can now complete Step 2-Parties and view/enter parties; or, click Step 3-Documents and upload a document(s); or, click Step 4-Service Contact and view/enter service contacts. Your selection does not have to be in sequential order.


Note: *If you did not enter information in one of the Steps, there will be **error messages** in Step 5-Review & Submit prompting you to **complete** those Steps/sections. **The platform will not allow the transaction to be submitted if one of the Steps has not been completed.** Please see screen shot in the next slide.*

FILING A NEW CASE:


Step 1 – Case Type *(continued)*

Case Details Almost done. Review Entries. Printable Version

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


Case Type 


Jurisdiction : Harris District Clerk – Civil	Case Category : Civil - Other Civil
Case Type : Other Civil	Filer Type : Attorney
Damage Amount : Less than \$100,000 and non-monetary relief	
Payment Account: Mastercard	Attorney : Attorney 9Test
Client Matter ID: 56-57	

Parties 0 

Sending Party	Party Type	Name	Address
---------------	------------	------	---------

Error:


- At least one party needed to continue. 

Documents 

Filing Code	Filing Description	Original Document	Converted Document	Optional Services	Document Category	Document Description	Courtesy Copies	Fees
-------------	--------------------	-------------------	--------------------	-------------------	-------------------	----------------------	-----------------	------

Responsible for Filing Fees :

Error:

- Please add document to continue. 
- Select Party Responsible for Filing Fees

FILING A NEW CASE:

Step 2 – Parties

To create the parties in the new case using File & Serve *Texas*, follow these steps:

1. Select **“Create New Parties.”**
2. Since this is a new case filing, the **“Total Case Parties”** will be listed as **“0”** until parties are added.

Case Details

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

Who are the parties?

[Create New Parties](#)

Party Name

[Go](#)

List of Parties

Total Case Parties: 0

Sending Party	Party Type	Name	Actions
---------------	------------	------	---------

[Back](#) [Next](#)

FILING A NEW CASE:

Step 2 – Parties (*continued*)

3. A new screen will pop-up.
4. Select “**Party Type**” from the drop-down menu. **Note:** *Party Types with an “*” are required in that jurisdiction.*
5. Select the radio button if the party (e.g., Plaintiff) is a “**Person**” or an “**Organization.**”
6. Select the radio button whether the party is your client or not by selecting “**Yes**” or “**No**”.
7. Enter the party’s First Name, Last Name. **Note:** Only the party name is mandatory. You can add information into the Address and Phone No. fields at your discretion.
8. Click “**Add Party**” to add the party to the List of Parties.
9. Walk through these steps for all remaining parties until complete.

(see next slide)

FILING A NEW CASE: Step 2 – Parties *(continued)*

Who are the parties?

Create New Parties

Create New Parties ×

Party Type
Plaintiff * * ▼

Person Or Organization Person Organization Is this your client Yes No

First Name Middle Name Last Name

Address Line 1

Address Line 2

City State ▼ Zip Code

Phone No.

FILING A NEW CASE:

Step 2 – Parties *(continued)*

10. Your List of Parties (Party Type/Name) will be displayed at the bottom of the screen, including the “**Total Case Parties**”.
11. Select the **Sending Party** for this envelope by checking the appropriate box.
12. Click “**Next**” to move to Step 3-Documents or on the tab, “**Step 3-Documents.**”

Case Details

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

Who are the parties?





Create New Parties

Party Name

Go

List of Parties

Total Case Parties: 2

Sending Party	Party Type	Name	Actions
<input checked="" type="checkbox"/>	Petitioner	John Smith	 
<input type="checkbox"/>	Respondent	James Company	 

Back Next

FILING A NEW CASE: Step 3 – Documents

To upload and attach documents to be filed in the new case using File & Serve Texas, follow these steps:

1. Enter the party **Responsible for Filing Fees** for this transaction by clicking on the drop-down menu.


Case Details

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

What documents are you filing?

Filing Code	Filing Type	Description	Actions
-------------	-------------	-------------	---------

[Add Document](#)

Responsible for Filing Fees 

Select

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

example@example.com, example@example.com

(Maximum character limit is 160 characters.)

[Back](#) [Next](#)


Note: Select the party responsible for the filing fees for this transaction by selecting/highlighting the party.

Responsible for Filing Fees

Select

|

Select

Doe Corp 

Jane Does

FILING A NEW CASE:

Step 3 – Documents *(continued)*

2. Click on “**Add Document**” to open up a new screen to begin uploading your documents.

Note: Only the Lead Document will be displayed, including the Filing Code, Filing Type, and (Filing) Description. You can edit the Lead Document and its Attachment by clicking on the “pencil” icon under the Action column. Or, you can click on the “trash can” icon to remove and start again.

Case Details

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

What documents are you filing?

Filing Code	Filing Type	Filing Description	Actions
<p>Add Document ←</p>			

Responsible for Filing Fees

ELTON CROSSLAND

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

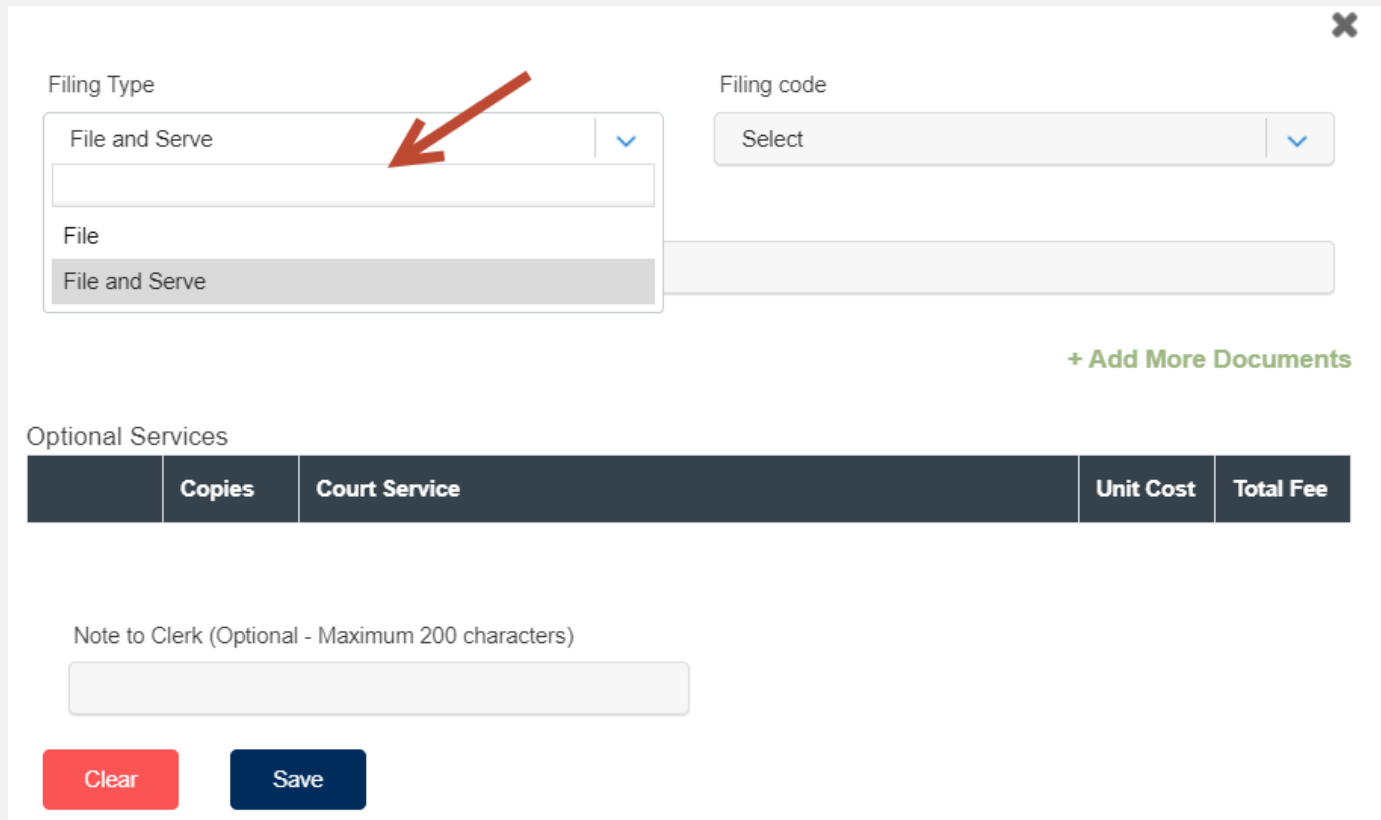
example@example.com, example@example.com

(Maximum character limit is 160 characters.)

Back Next

FILING A NEW CASE: Step 3 – Documents *(continued)*

3. Filing Type: Defaulted to “File and Serve.” If you’d like a “File” only transaction, click on the drop-down menu and select “File.”



The screenshot shows a web form for filing a document. At the top right is a close button (X). The form has two main sections: 'Filing Type' and 'Filing code'. The 'Filing Type' dropdown menu is open, showing 'File and Serve' as the selected option and 'File' as an alternative option. A red arrow points to the 'File' option. Below the dropdowns is a '+ Add More Documents' link. The 'Optional Services' section contains a table with columns for 'Copies', 'Court Service', 'Unit Cost', and 'Total Fee'. Below the table is a 'Note to Clerk' field with a character limit of 200. At the bottom are 'Clear' and 'Save' buttons.

Filing Type

Filing code

File and Serve

Select

File

File and Serve

+ Add More Documents

Optional Services

	Copies	Court Service	Unit Cost	Total Fee
--	--------	---------------	-----------	-----------

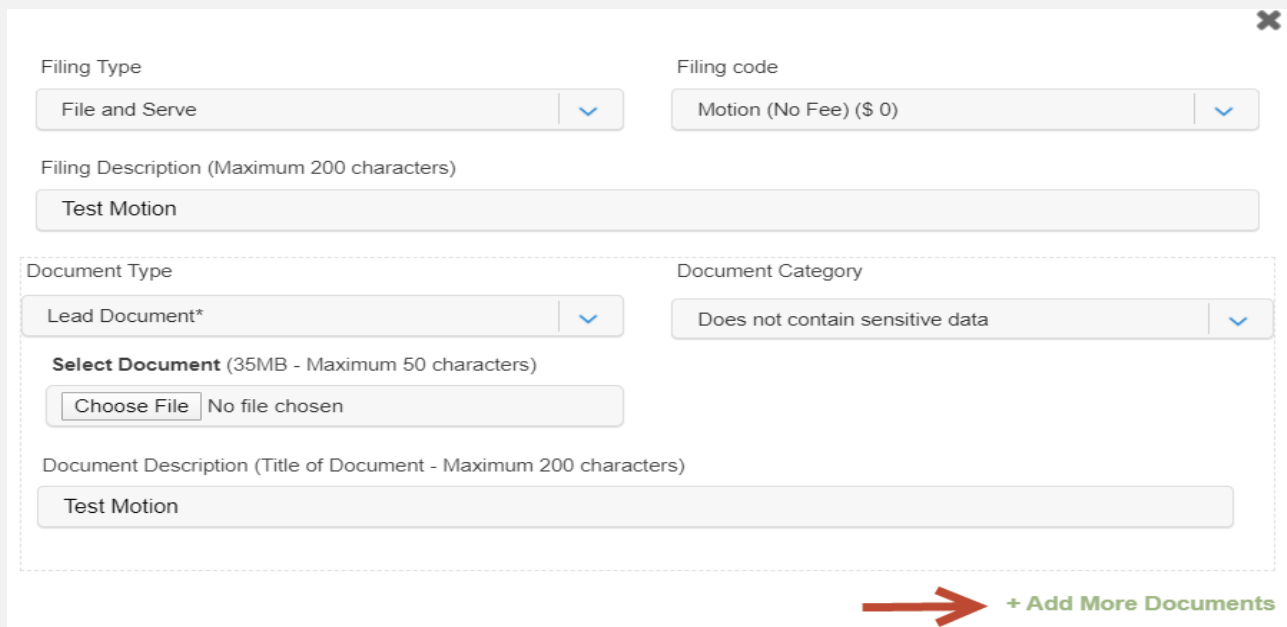
Note to Clerk (Optional - Maximum 200 characters)

Clear Save

FILING A NEW CASE:

Step 3 – Documents *(continued)*

4. Select the Filing Code.
5. Enter the Filing Description. This is the set of documents you are eFiling/eServing in this envelope. Note the character limit of 200.
6. Select the Document Type (Lead/Attachment/Proposed order) This will vary based on the Court.
7. Document Category.
8. Click on “**Browse**” or “**Choose File**” to upload the Lead Document. Note the character limit for the file name is 50 characters. This includes, e.g., “.pdf”.
9. Note the document size limit of 25MB; Envelope size is 35MB
10. To add more documents, click on Add More Documents as seen below.



The screenshot displays a web form for filing a document. At the top right is a close button (X). The form is organized into several sections:

- Filing Type:** A dropdown menu with "File and Serve" selected.
- Filing code:** A dropdown menu with "Motion (No Fee) (\$ 0)" selected.
- Filing Description (Maximum 200 characters):** A text input field containing "Test Motion".
- Document Type:** A dropdown menu with "Lead Document*" selected.
- Document Category:** A dropdown menu with "Does not contain sensitive data" selected.
- Select Document (35MB - Maximum 50 characters):** A section containing a "Choose File" button and a "No file chosen" status.
- Document Description (Title of Document - Maximum 200 characters):** A text input field containing "Test Motion".

At the bottom right of the form, there is a red arrow pointing to a green button labeled "+ Add More Documents".

FILING A NEW CASE: Step 3 – Documents *(continued)*

To upload and attach documents to be filed in the new case using File & Serve Texas, follow these steps:


11. Some jurisdictions will offer “**Optional Services.**” If available, check the appropriate box(es) and enter the number of desired copies.

Optional Services				
	Copies	Court Service	Unit Cost	Total Fee
<input type="checkbox"/>	<input type="text"/>	Issue Subpoena	8.00	0.00
<input checked="" type="checkbox"/>	1 	Issue Citation	8.00	8.00

12. Next, enter a Note to Clerk. This is your “**direct**” communication with the court clerk.
13. Click “**Save**” to attach the Lead Document and Attachment to the envelope.

Note to Clerk (Optional - Maximum 200 characters)

**Your direct communication
with the clerk.**



FILING A NEW CASE: Step 4 – Service Contacts

To create service contacts in a new case using File & Serve Texas, follow these steps:

1. Select Firm Service Contacts from the drop-down menu under “**Add Individually.**”
2. Enter the first and last name of the support staff member(s) in your firm.
3. Select “**Search,**” and “**Add to List.**”

Add Individually

Add Contact From Firm Service Contacts

First Name: Warda

Last Name: Khan

Email:

Search

First Name	Last Name	Email	Action
warda	khan	wkhan@fileandserve.com	Add To List

FILING A NEW CASE:

Step 4 – Service Contacts *(continued)*

4. To add an attorney in the state of Texas, including the attorney(s) within your firm, select “**Add Contact From Public List**” from the drop-down menu under “**Add Individually**.” This is managed by the State Bar of Texas.
5. Enter the first and last name of the attorney(s).
6. Select “**Search**” and “**Add to List.**”

The screenshot shows a web form titled "Add Individually". At the top, there is a dropdown menu with the text "Add Contact From Public List" and a blue downward arrow icon. A red arrow points to this dropdown. Below the dropdown are two input fields: "First Name" with the text "John" and "Last Name" with the text "Doe". Red arrows point to both of these input fields. Below the "First Name" field is an "Email" field, and below the "Last Name" field is a "Firm Name" field. At the bottom left of the form is a dark blue button with the text "Search" in white. A red arrow points to this button.

FILING A NEW CASE:

Step 4 – Service Contacts *(continued)*

7. To add a New Service Contact, select “**Add New Service Contact**” from the drop-down menu under “**Add Individually.**”
8. Enter their first name, last name, and email address. Click “**Save.**”

The screenshot shows a form titled "Add Individually". At the top is a dropdown menu with "Add New Service Contact" selected. Below this are four input fields: "First Name" containing "Natalie", "Middle Name" (empty), "Last Name" containing "Rasco", and "Email" containing "nr@fileandserve.com" with a clear 'X' button. At the bottom are two buttons: a red "Cancel" button and a dark blue "Save" button. Red arrows point to the dropdown menu, the "First Name" field, the "Last Name" field, the "Email" field, and the "Save" button.

FILING A NEW CASE:

Step 4 – Service Contacts *(continued)*

9. New Service Contacts will be saved to the service list and to “**Service Contacts**” under your firm.
10. You can then easily search for them under “**Add Firm Service Contacts**” for any future cases.
11. The Firm Administrator can access Firm Service Contacts under “**Service Contacts**” in the Firm Admin drop-down menu to edit, remove, or add any Firm Service Contacts. Filers can access Firm Service Contacts under “Service Contacts” under the “**Filing**” drop-down menu to edit, remove, or add any Firm Service Contacts.
12. You can edit or remove a service contact during the filing by selecting the “pencil” icon or the “trash can” icon under the Action column.

Who should be notified about this filing?

Current Notice List: Parties will be e-Served and notified.

e-Serve	2	Name	Email	Action
<input checked="" type="checkbox"/>		Natalie Rasco	nr@fileandserve.com	 
<input checked="" type="checkbox"/>		warda khan	wkhan@fileandserve.com	 

13. Click “**Next**” to move to Step 5-Review & Submit or on the tab, “**Step 5-Review & Submit**”.

FILING A NEW CASE: Step 5 – Review & Submit

To review the envelope details prior to submitting to the court using File & Serve Texas, follow these steps:

1. Using your scroll bar, review each section.
2. If you find a mistake in a section, click on the “pencil” icon to edit that section.
3. The Document section will display the Lead Document(s), its Attachment(s), the original format(s), converted format(s) (if applicable), the “Accepted Notifications”, and any Filing Code fees.

Case Details Almost done. Review Entries. [Printable Version](#)

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

Case Number : 10-0001

Case Type

Jurisdiction : Supreme Court	Case Category : Civil - Other Civil
Case Type : Civil	Filer Type : Not Applicable
Payment Account: Mastercard	Attorney : Attorney 9Test
Case Number: 10-0001	
Client Matter ID: 45698	

Parties 2

Sending Party	Party Type	Name	Address
<input checked="" type="checkbox"/>	Appellee	Not So Funny Business	
	Appellant	Funny Business	

Documents

Filing Code	Filing Description	Original Document	Converted Document	Optional Services	Document Category	Document Description	Fees
Motion for Emergency Relief (Lead Document) Note to Clerk: Thank you!	Motion	SAMPLE MOTION.docx			Public	Motion for Emergency Relief	\$10.00

Responsible for Filing Fees : Not So Funny Business

Send Accepted Notifications To: nemken@fileandserve.com, wkhan@fileandserve.com

FILING A NEW CASE:

Step 5 – Review & Submit *(continued)*

4. Make sure the correct party is listed next to the “**Responsible for Filing Fees**” section.
5. The Service Contact section will display, “**Yes**” for contacts to be served with this envelope.
6. All fees associated with the transaction will be listed for your review.
7. You can print the envelope details by selecting “**Printable Version**.”
8. You must select “**Submit**” for immediate filing to the court and service on the selected contacts.

Case Details Almost done. Review Entries. [Printable Version](#)

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

Case Type

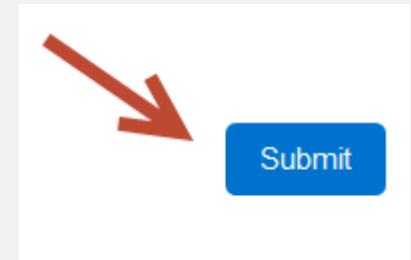
Jurisdiction : Harris District Clerk – Civil	Case Category : Civil - Other Civil
Case Type : Other Civil	Filer Type : Attorney
Damage Amount : Less than \$100,000 and non-monetary relief	
Payment Account: Mastercard	Attorney : Attorney 9Test
Client Matter ID: 56-57	

Parties 2

Sending Party	Party Type	Name	Address
<input checked="" type="checkbox"/>	Plaintiff	John Doe	
<input type="checkbox"/>	Defendant	Doe Corp	

Documents

Filing Code	Filing Description	Original Document	Converted Document	Optional Services	Document Category	Document Description	Courtesy Copies	Fees
-------------	--------------------	-------------------	--------------------	-------------------	-------------------	----------------------	-----------------	------



FILING A NEW CASE: Step 5 – Review & Submit *(continued)*

9. After you click “**Submit**,” your Envelope ID will pop up. Click “**Ok**.”
10. You will be automatically taken to the Completed Filings page.
11. You will be able to view the Transaction Summary by clicking on the “eyeball” icon next to the envelope under “**Search Results**.” You will be able to print the Transaction Summary.
12. Until the court clerk Accepts, Rejects, or Returns the envelope, you can cancel it. Click on the “**X**” next to the transaction to “**Cancel entire Envelope**”.

Completed Filings + New Filing

Search: 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:

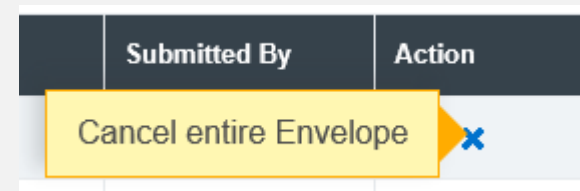
Go Clear All

Search Results

Show: filings per page Search:

Envelope ID	Case Name	Case Number	Jurisdiction	Created on	Submitted By	Action
191173		10-0001	Supreme Court	11/01/2017	integratedcft 627	

Clicking the “X” will cancel the envelope so you can start over.



FILING A NEW CASE:

Step 5 – Review & Submit *(continued)*

13. Once the clerk accepts your filing, you will see a “+” icon next to the transaction. You can click on the “+” sign going forward to e-file/e-serve into the now existing case.
14. You can search for a case by entering a partial case name or jurisdiction under “Search”. You can also limit the number of envelopes you see under the “Show” feature. **Note: The search bar in the Incomplete and Completed Filings page does not recognize a search using the combination of three special characters – colon (:), double quote (“), and question mark (?). Some jurisdictions will not allow the case name to be populated and will be “blank” as shown below.**

The screenshot shows a search results page. At the top right, there are two buttons: a blue 'Go' button and a red 'Clear All' button. Below the search bar, there is a 'Show' dropdown menu set to '25 filings per page'. The search bar contains the text 'Supreme'. Below the search bar, there is a table with the following columns: Envelope ID, Case Name, Case Number, Jurisdiction, Created on, Submitted By, and Action. The table contains two rows of data. The first row has Envelope ID 191173, Case Name (blank), Case Number 10-0001, Jurisdiction Supreme Court, Created on 11/01/2017, Submitted By integratedcft 627, and Action icons (eye, plus, minus). The second row has Envelope ID 191118, Case Name (blank), Case Number 10-0001, Jurisdiction Supreme Court, Created on 10/31/2017, Submitted By integratedcft 627, and Action icons (eye, plus, minus). Red arrows point to the 'Show' dropdown, the search bar, and the 'Action' column.



Envelope ID	Case Name	Case Number	Jurisdiction	Created on	Submitted By	Action
191173		10-0001	Supreme Court	11/01/2017	integratedcft 627	👁️ + ✖️
191118		10-0001	Supreme Court	10/31/2017	integratedcft 627	👁️ + ✖️

LOCATING YOUR FILE-STAMPED DOCUMENT

In File & Serve Texas

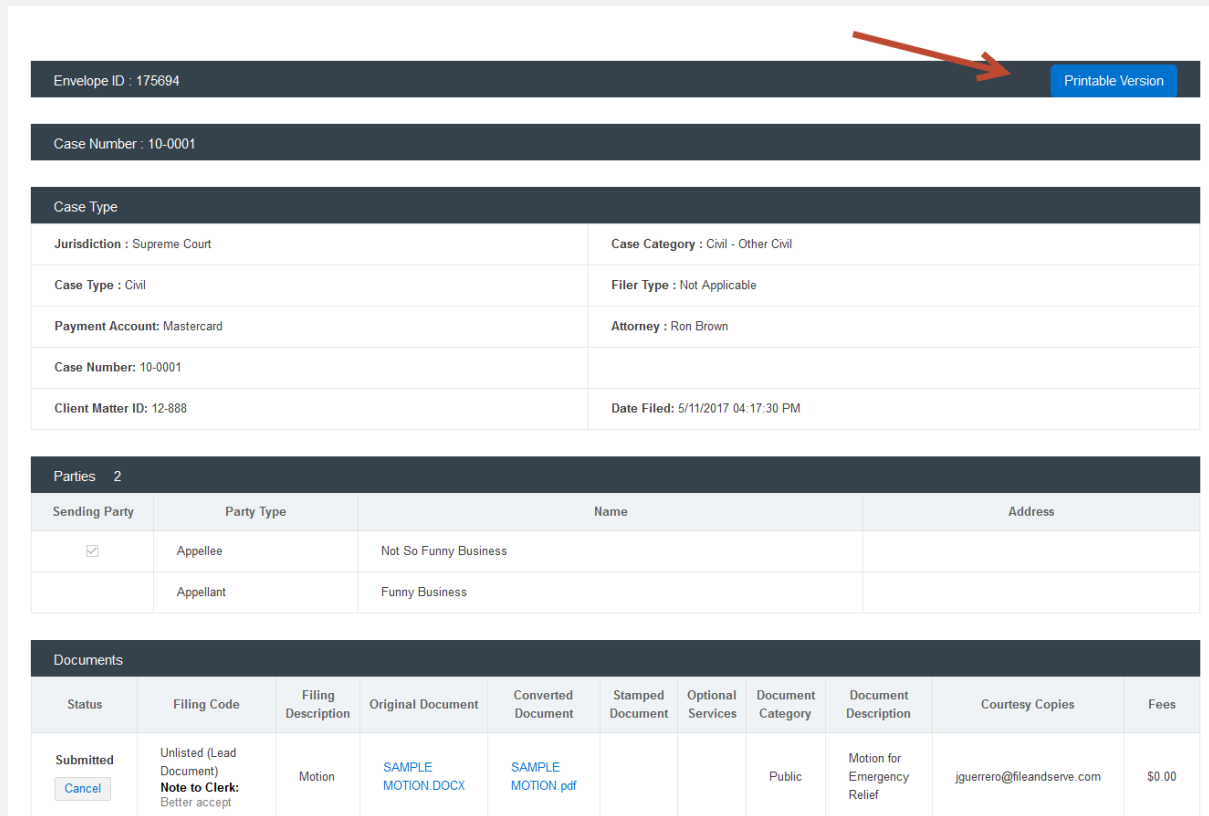
Once you receive the Accepted notification from Efile Texas, you will be able to view your file-stamped document within File & Serve Texas. Please follow these steps using File & Serve Texas to locate:

1. Go to your 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.
5. The link to your file-stamped document will be there. This link will remain available for viewing at any time.

Documents								
Status	Filing Code	Filing Description	Original Document	Converted Document	Stamped Document	Optional Services	Document Category	Document Description
Accepted (10/26/2016 14:36)	Motion (No Fee) (Lead Document) Note to Clerk: 	DEFENDANT'S SECOND SUPPLEMENT TO THIRD AMENDED PLEA TO THE JURISDICTION	D's 2nd Suppl to 3rd Am PTJ-L.pdf		D's 2nd Suppl to 3rd Am PTJ-L.pdf		Does not contain sensitive data	DEFENDANT'S SECOND SUPPLEMENT TO THIRD AMENDED PLEA TO THE JURISDICTION

REVIEWING YOUR TRANSACTION SUMMARY

1. You will be able to print the transaction summary for your records by clicking, **“Printable Version”**.



The screenshot shows a transaction summary page. At the top right, a red arrow points to a blue button labeled "Printable Version". The page is divided into several sections:

- Envelope ID :** 175694
- Case Number :** 10-0001
- Case Type**

Jurisdiction : Supreme Court	Case Category : Civil - Other Civil
Case Type : Civil	Filer Type : Not Applicable
Payment Account: Mastercard	Attorney : Ron Brown
Case Number: 10-0001	
Client Matter ID: 12-888	Date Filed: 5/11/2017 04:17:30 PM
- Parties 2**

Sending Party	Party Type	Name	Address
<input checked="" type="checkbox"/>	Appellee	Not So Funny Business	
	Appellant	Funny Business	
- Documents**

Status	Filing Code	Filing Description	Original Document	Converted Document	Stamped Document	Optional Services	Document Category	Document Description	Courtesy Copies	Fees
Submitted Cancel	Unlisted (Lead Document) Note to Clerk: Better accept	Motion	SAMPLE MOTION.DOCX	SAMPLE MOTION.pdf			Public	Motion for Emergency Relief	jguerrero@fileandserve.com	\$0.00

REVIEWING YOUR TRANSACTION SUMMARY

(continued)

2. You will also be able to view the **real-time status of service** (see screen shot below).

Service Contact 1						
e-Serve	Name	Email	Public	Party Name	Status	Date Opened
Yes	[REDACTED]	[REDACTED]	Yes	Not So Funny Business	Sent	11/14/2016 8:35:12 AM



REVIEWING YOUR TRANSACTION SUMMARY

(continued)

3. You will also be able to view the **clerk's comments** under the Documents section.

Documents									
Status	Filing Code	Filing Description	Original Document	Converted Document	Stamped Document	Optional Services	Document Category	Document Description	Courtesy Copies
Rejected (11/08/2016)	Petition (Lead Document) Note to Clerk:	daf	This!%AFi-e&ndThe #N@meThe+FileHa\$49Character.PDF				Does not contain sensitive data	daga	

Documents			
Status	Filing Code	Filing Description	Original Document
Rejected	Petition (Lead Document)	daf	This!%AFi-e&ndThe #N@meThe+FileHa\$49Character.PDF

Filing Review Comments :- reject 1
Reject Reason :-Duplicate New Case Filing - Please File Under Existing Case

REVIEWING SUBMITTED FILINGS

1. You can review your submitted filings on the Completed Filings page. Under the drop-down menu “**Sort By**” it will default to “**My Filings**”. Enter information into at least one the filters and select “**Go**”. Your transaction will be displayed under “**Search Results**”.
2. You can review submitted filings by firm members by clicking on the drop-down menu “**Sort By**” and selecting “**My Firm’s Filing**”. Enter information into at least one the filters and select “**Go**”. Your transaction will be displayed under “**Search Results**”.

The screenshot shows the 'Completed Filings' search interface. At the top right, there is a '+ New Filing' button. The search area contains several filters: 'Search' (with a 'Select' dropdown), 'Jurisdiction' (with a 'Select' dropdown), 'From Date (mm/dd/yyyy)' (text input), 'To Date (mm/dd/yyyy)' (text input), 'Sort By' (dropdown menu with 'My Filings' selected and 'My Firm's Filings' highlighted), 'Filing Type' (with a 'Select' dropdown), 'Filing Code' (with a 'Select' dropdown), 'Envelope ID' (text input), 'Case Number' (text input), and 'Filing Status' (with a 'Select' dropdown). At the bottom right, there are 'Go' and 'Clear All' buttons. At the bottom left, there is a 'Search Results' section with a 'Show' dropdown set to '25 filings per page' and a 'Search:' text input field.

REVIEWING SUBMITTED FILINGS *(continued)*

- When searching under “**My Firm’s Filings**,” you will be able to see who submitted the filing under the column, “**Submitted By**”.
- You can also click on any column header to put into ascending or descending order.

Search Results

Go Clear All

Search: Supreme

Show 25 filings per page

Envelope ID	Case Name	Case Number	Jurisdiction	Created on	Submitted By	Action
191173		10-0001	Supreme Court	11/01/2017	integratedcft 627	🔍 + ✕
191118		10-0001	Supreme Court	10/31/2017	integratedcft 627	🔍 + ✕

REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS

If you receive a “Return for Correction” or a “Rejected” notification from Efile Texas, please follow these steps to upload and submit your corrected documents:

1. Log onto File & Serve Texas and select the “Completed Filings” page from the “Filing” drop-down menu.
2. Find the transaction with the “back arrow” in red.
3. Click on the back arrow to open up the transaction.

The back arrow allows you to open up the transaction & easily re-submit the corrected documents.

Search Result

Transaction ID	Envelope ID	Case Number	Jurisdiction	Created on	Submitted By	Action
100492	159391	FST 1109-1	Bexar County - District Clerk	11/10/2016	integratedcft 627	🔍 +
100474	159349	FSTDB- 1103	Bexar County - District Clerk	11/10/2016	integratedcft 627	🔍 +
100435	159319		Bexar County - District Clerk	11/09/2016	integratedcft 627	🔍 ✖
100434	159313	45645	Bexar County - District Clerk	11/09/2016	integratedcft 627	🔍 ✖
100434	159348		Montgomery County - District Clerk	11/09/2016	integratedcft 627	🔍 ✖
100429	159304	FST 1109-1	Bexar County - District Clerk	11/09/2016	integratedcft 627	🔍 +
100357	159387	FST 1110	Bexar County - District Clerk	11/08/2016	integratedcft 627	🔍 +
100344	159154		Bexar County - District Clerk	11/08/2016	integratedcft 627	🔍
100343	159153	FSTDB- 1103	Bexar County - District Clerk	11/08/2016	integratedcft 627	🔍 +
100335	159135		Bexar County - District Clerk	11/07/2016	integratedcft 627	🔍 >
100334	159134		Bexar County - District Clerk	11/07/2016	integratedcft 627	🔍 >


REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS *(continued)*

4. All fields in Step-1 will be auto-populated. Adjust if necessary. Click “**Next**” to move to Step 2-Parties.
5. Select the “**Sending Party**” if not selected. Click “**Next**” to move to Step 3-Documents. (see next slide)
6. Click on the “pencil icon” to open up the document(s) submitted for this transaction. (see next slide)

Case Details

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

Is this filing for an existing case? Yes	Case Type Malpractice - Accounting (\$287.00)
Case Number FAS - 1110A	Payment Account Mastercard
Jurisdiction Bexar County - District Clerk	Attorney Ron Brown
Filer Type Select	Client Matter ID 1110-2
Case Category Civil - Injury or Damage	

 [Next](#)

REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS (continued)

Case Details

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

Who are the parties?

Create New Parties

Party Name

Go

List of Parties

Total Case Parties: 2

Sending Party	Party Type	Name	Actions
<input checked="" type="checkbox"/>	Defendant	Defendant Joe	
<input type="checkbox"/>	Plaintiff	Plaintiff Tester	

Back Next

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Step 2-Parties:
Select the
“Sending Party”
if the box isn’t
selected.

Step 3-Documents:
Click on the pencil
icon to upload the
corrected
document(s).

Case Details

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

What documents are you filing?

Filing Code	Filing Type	Description	Actions
Transfer (County Use Only)	File and Serve	FAS Reject	



REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS *(continued)*

7. Click on the “**Browse**” button to grab the corrected document.
8. Enter your Note to Clerk.
9. Click on “**Update**” to save the corrected documents to the envelope.
10. Repeat the steps for all Lead Documents and corresponding attachments in the envelope that have been “Returned for Correction” or “Rejected”.
11. Enter any email address(es) of legal team members into the “Accepted Notification” field to ensure it is sent to them.

Case Details


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

What documents are you filing?


Filing Code	Filing Type	Description	Actions
Motion for Emergency Relief	File and Serve	Motion	 

[Add Document](#)

Responsible for Filing Fees

Not So Funny Business 

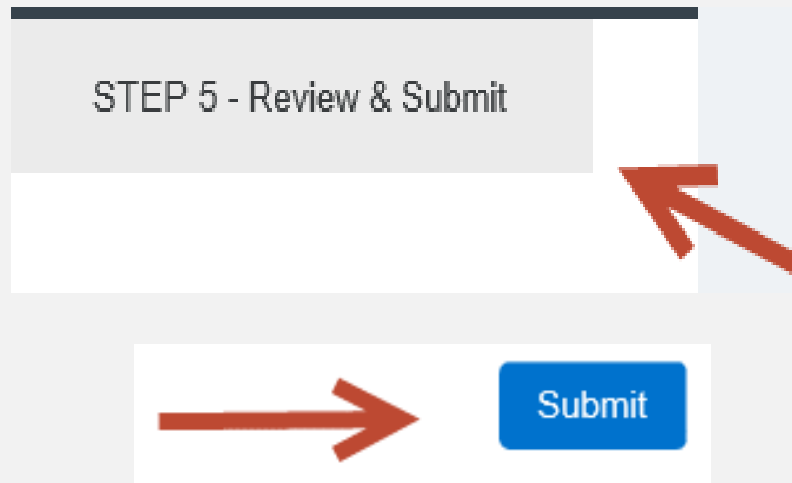
Send Accepted Notifications To: (Optional Field. Add email address for each recipient you want to receive accepted notifications.)

nemken@fileandserve.com, wkhan@fileandserve.com 

(Maximum character limit is 160 characters.)

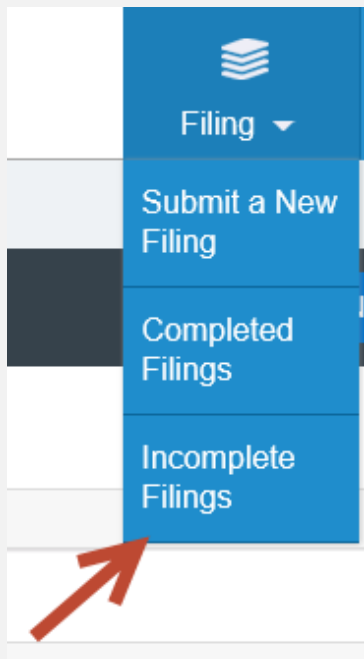
REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS *(continued)*

12. Click “**Next**” to move to Step 5-Review & Submit, or click on the “Step 5-Review & Submit” tab.
13. Review the transaction and click on the “pencil icon” if any further corrections need to be made in any one section.
14. Click on “**Submit**” to file with the court and serve on selected parties (if applicable).
15. You will receive a new envelope ID and the transaction will be displayed in “**Completed Filings.**”



INCOMPLETE FILINGS

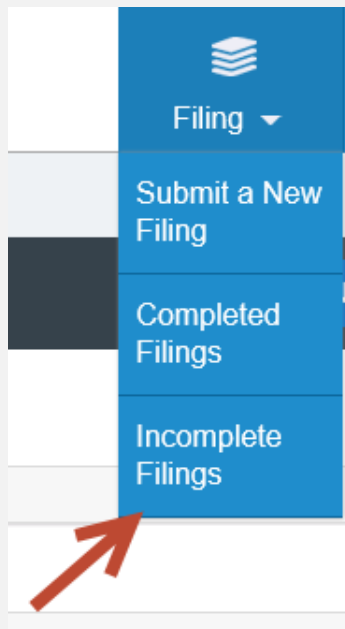
1. If needed, you can log out of File & Serve *Texas* in the middle of a transaction and finish the transaction at a later date.
2. To complete the filing, please log back into File & Serve *Texas*. Go under the “**Filing**” drop-down menu and select “**Incomplete Filings**”.
3. Under “**Search Results**,” you will see the transaction. Click on “**Complete Filing**” under the Action column to complete and submit your filing.
4. The Incomplete Filings will be available for 30 days.

The 'Incomplete Filings' dashboard interface. It includes a '+ New Filing' button, 'Sort By' (My Filings), 'Jurisdiction' (Select), 'From Date' and 'To Date' input fields, and a 'Go' button. Below is a 'Search Results' section with a 'Show 25 filings per page' dropdown and a search input field. A table lists two filings with columns for Jurisdiction, Case Name, Case Number, Created on, Created By, and Action. A red arrow points to the 'Complete Filing | Delete Filing' link in the Action column of the second row.

Jurisdiction	Case Name	Case Number	Created on	Created By	Action
Supreme Court		10-0001	11/02/2017	integratedcft 627	Complete Filing Delete Filing
Supreme Court		10-0001	11/01/2017	integratedcft 627	Complete Filing Delete Filing

INCOMPLETE FILINGS (continued)

5. If you need to complete a filing by another firm member, please log into File & Serve Texas.
6. Go under the “Filing” drop-down menu and select “Incomplete Filings”.
7. Under “Sort By”, click on the drop-down menu and select “My Firm’s Filing” and select “Go”.
8. Search for the firm filer under the “Created By” column. You can also enter their name in the “Search” field.
9. Once you find the filing(s), click on “Complete Filing” under the Action column to complete and submit the filing.



The 'Incomplete Filings' search interface. It features a 'Sort By' dropdown menu with 'My Filings' selected, a search input field, and a 'Go' button. A red arrow points to the 'Sort By' dropdown. To the right, there are fields for 'Jurisdiction' (set to 'Select') and 'To Date (mm/dd/yyyy)'. A '+ New Filing' button is in the top right corner.

Search Results table showing two rows of filing data. The 'Created By' column is circled in red.

Jurisdiction	Case Name	Case Number	Created on	Created By	Action
Supreme Court		10-0001	11/02/2017	integratedcft 627	Complete Filing Delete Filing
Supreme Court		10-0001	11/01/2017	integratedcft 627	Complete Filing Delete Filing