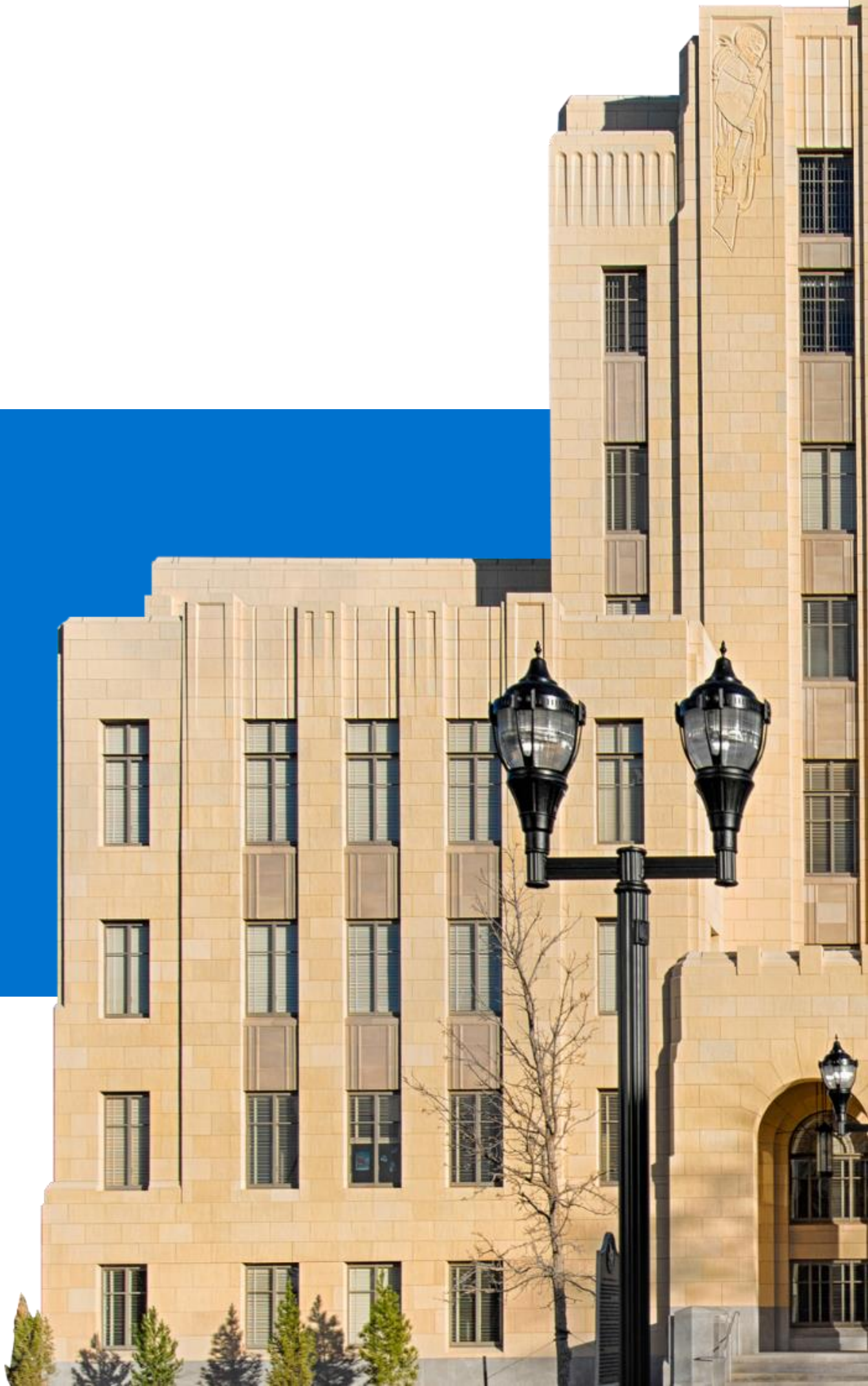
File & Serve Texas™

USER GUIDE

New Case Filings



File & Serve *Texas*

New Case Filing

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File & Serve Texas Resources

File & Serve Texas

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

File & Serve *Texas*™

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

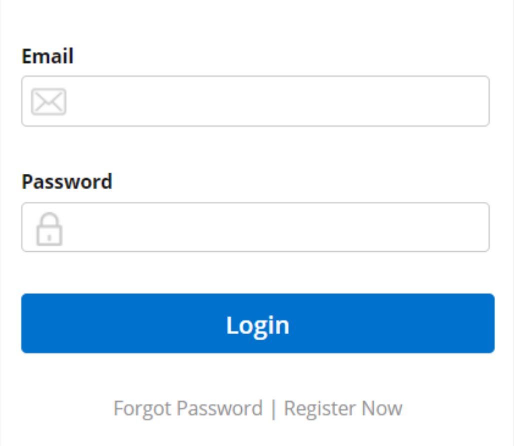
Before You Begin

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 s ure your computer is correctly configured for using File & Serve *Texas*.

3. If you need assistance, call our Client Support line a t 1-888-247-2051. They are available to help you 24/7/365.

Logging in to File & Serve *Texas*



1. Open IE, Chrome, or Firefox and go to www.fileandservetexas.com.

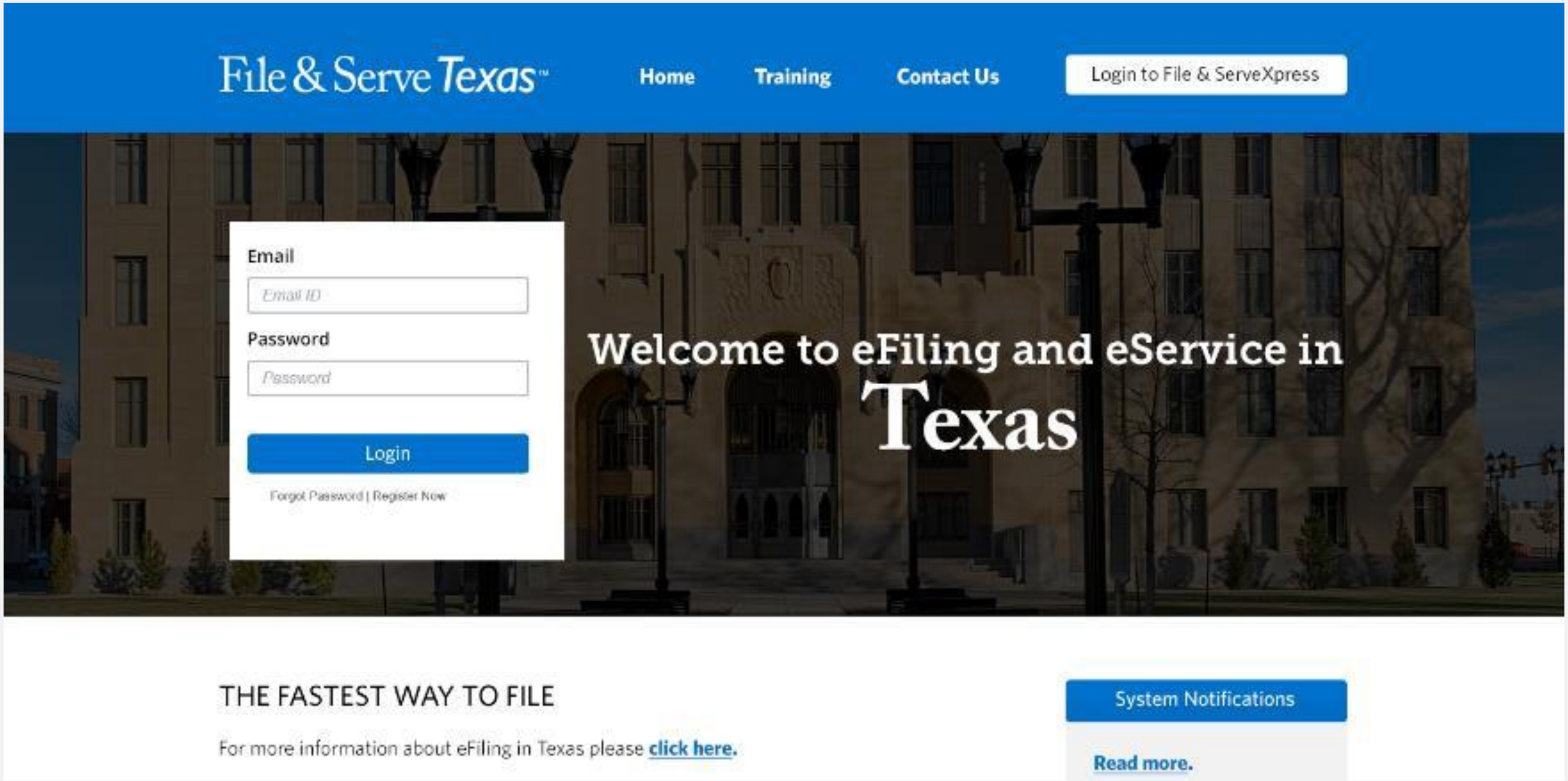
2. Enter your Username and Password and click **Login**.

3. **If you do not have a Username/Password, please contact your Firm Administrator.**

GETTING STARTED

File & Serve *Texas*™

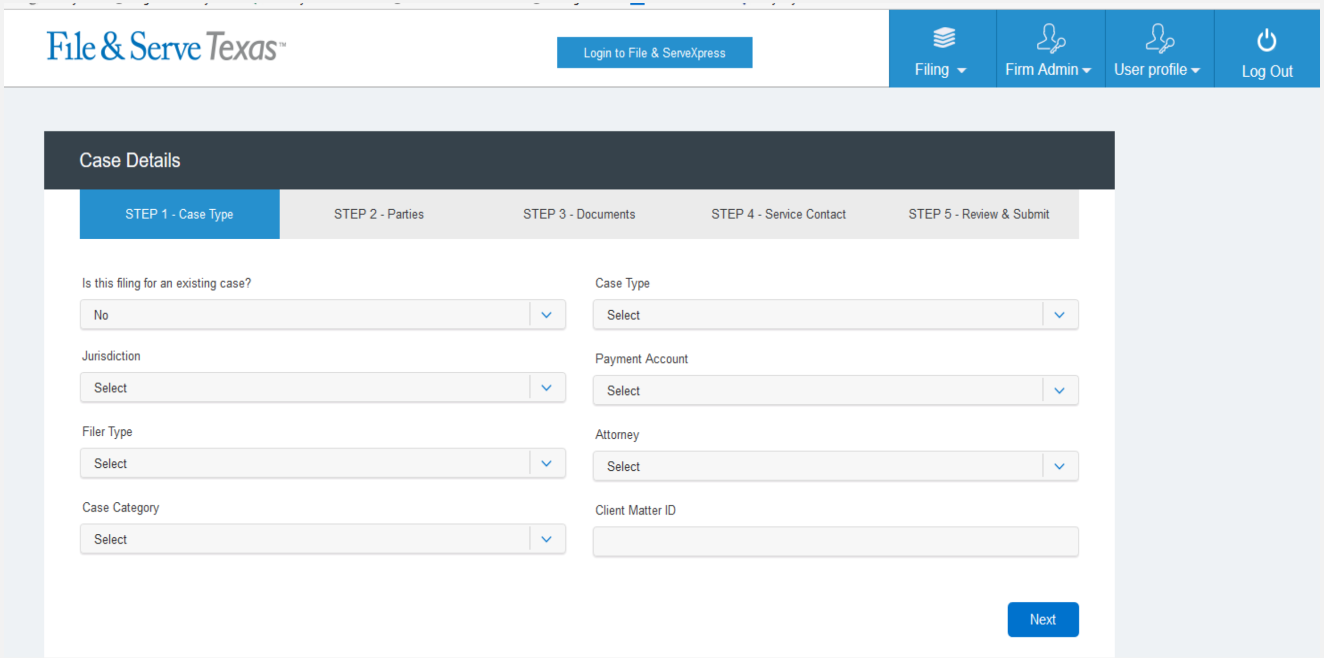
1. Access the File & Serve *Texas* login page via www.fileandservetexas.com
2. Enter your Username/Password and click "**Login**".



GETTING STARTED *(continued)*

3. 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.

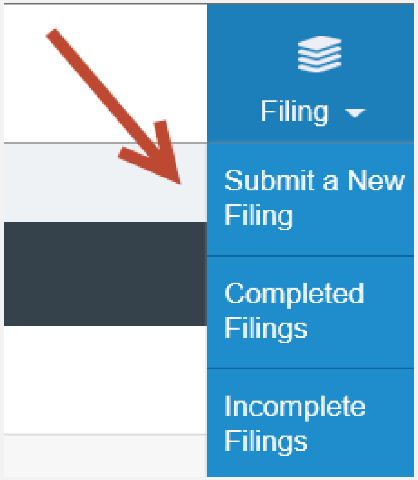
4. You may begin the new filing by entering the information into the fields. Or, if you are on the Incomplete Filings page, or the Completed Filings page you can, (a) select "Submit a New Filing" from the Filing drop-down menu, or (b) select the "**+New Filing**" button. Both will take you to the Case Details page to begin the filing. Please see next slide for screen shots.



GETTING STARTED *(continued)*

File & Serve Texas™

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.

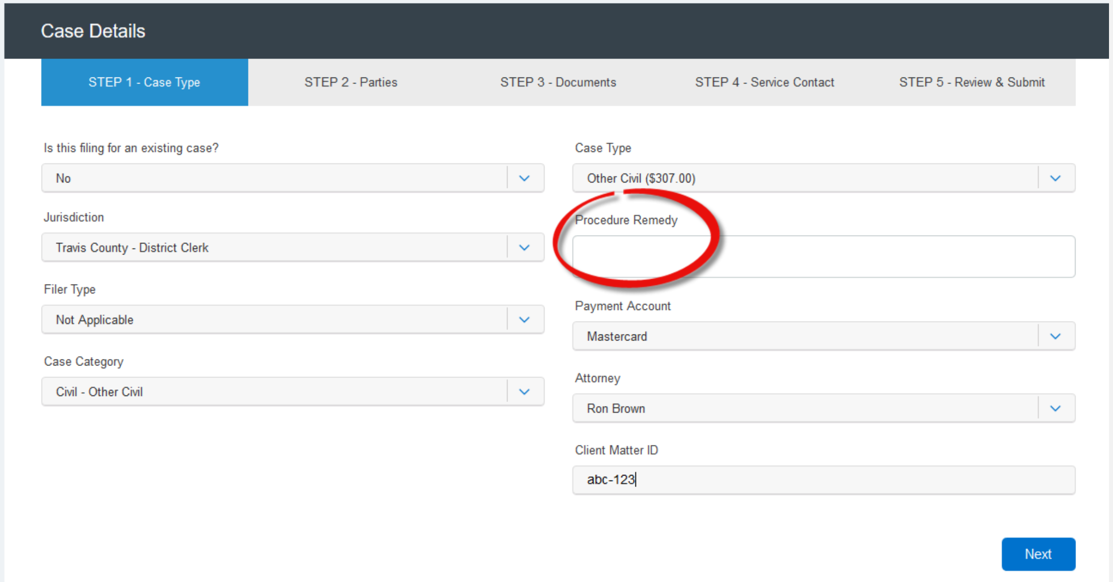


FILING A NEW CASE:
Step 1 – Case Type

File & Serve Texas™

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

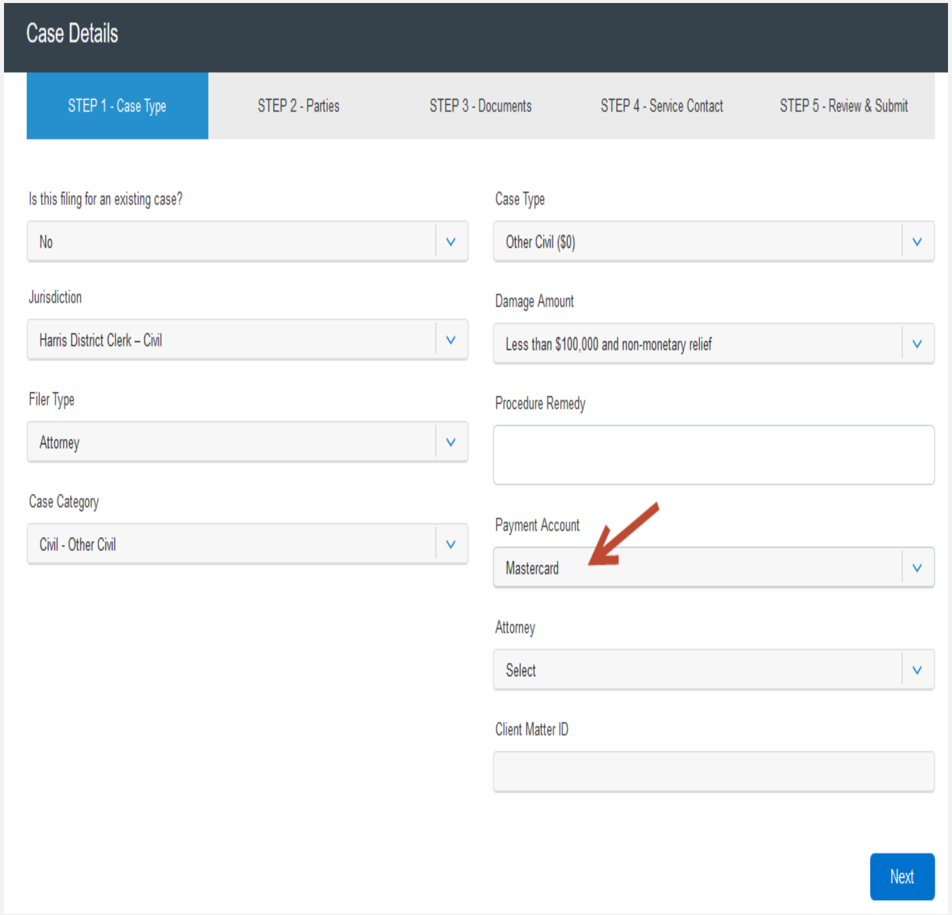
1. Leave the selection as "**No**" for the question, "**Is this filing for an existing case?**".
2. Select the Jurisdiction. ***Note:*** *You can type into this field.*
3. Select the Filer Type.
4. Select the Case Category.*
5. Select the Case Type.
6. Payment Account: This will be auto-populated to 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.



***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)*

File & Serve Texas™

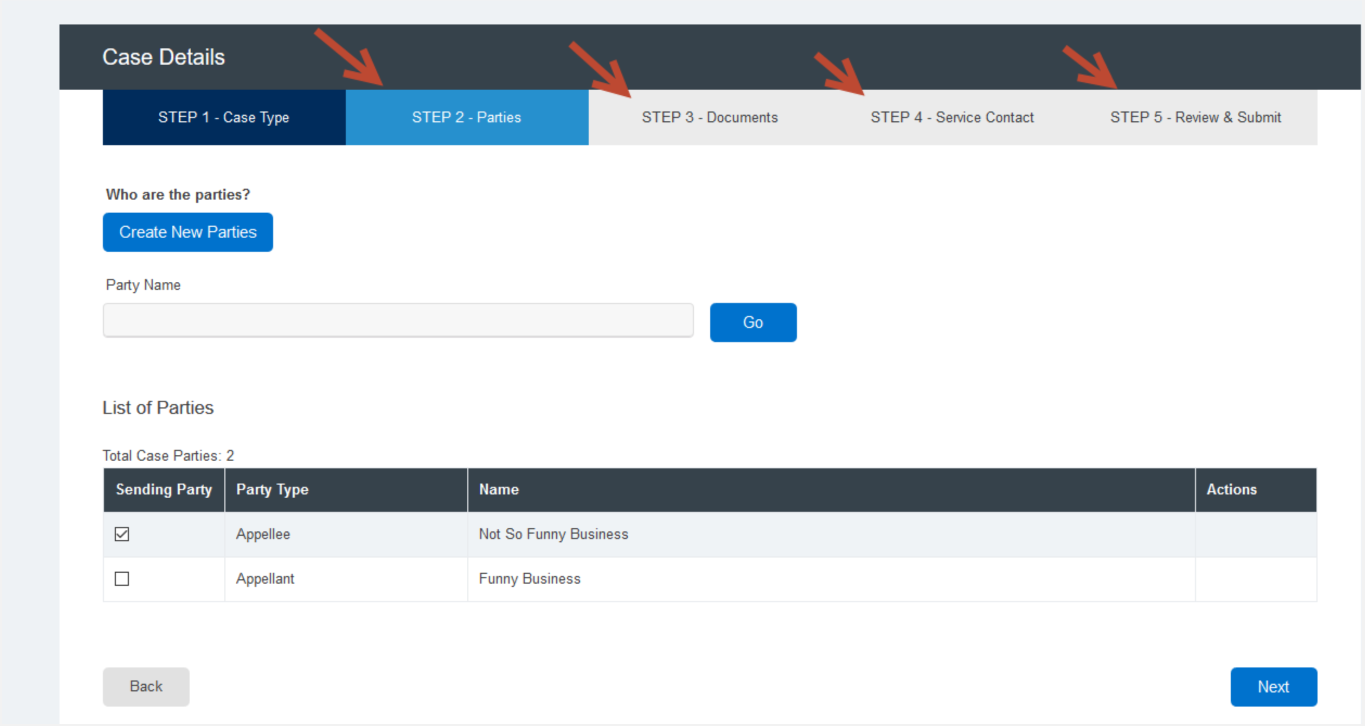


FILING A NEW CASE:
Step 1 – Case Type *(continued)*

File & Serve *Texas*™

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.



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

File & Serve Texas™

TOGGLING BETWEEN STEPS

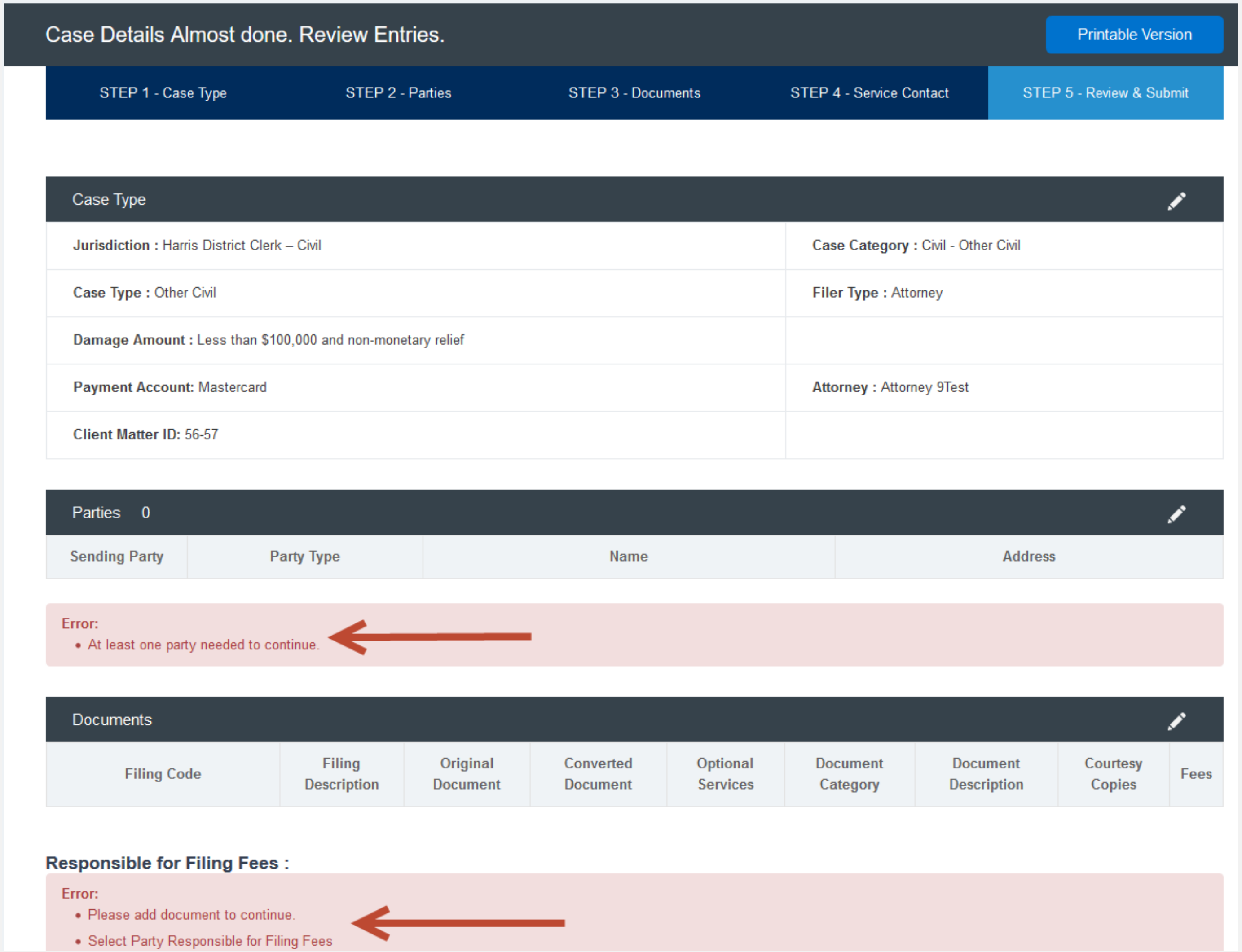
10. Once you click **"Next"** on Step 1-Case Type, you will be allowed to toggle between Step 1, Step 2, Step 3, Step 4, or Step 5 in any order of your choice.

    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)*

File & Serve Texas™



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 :

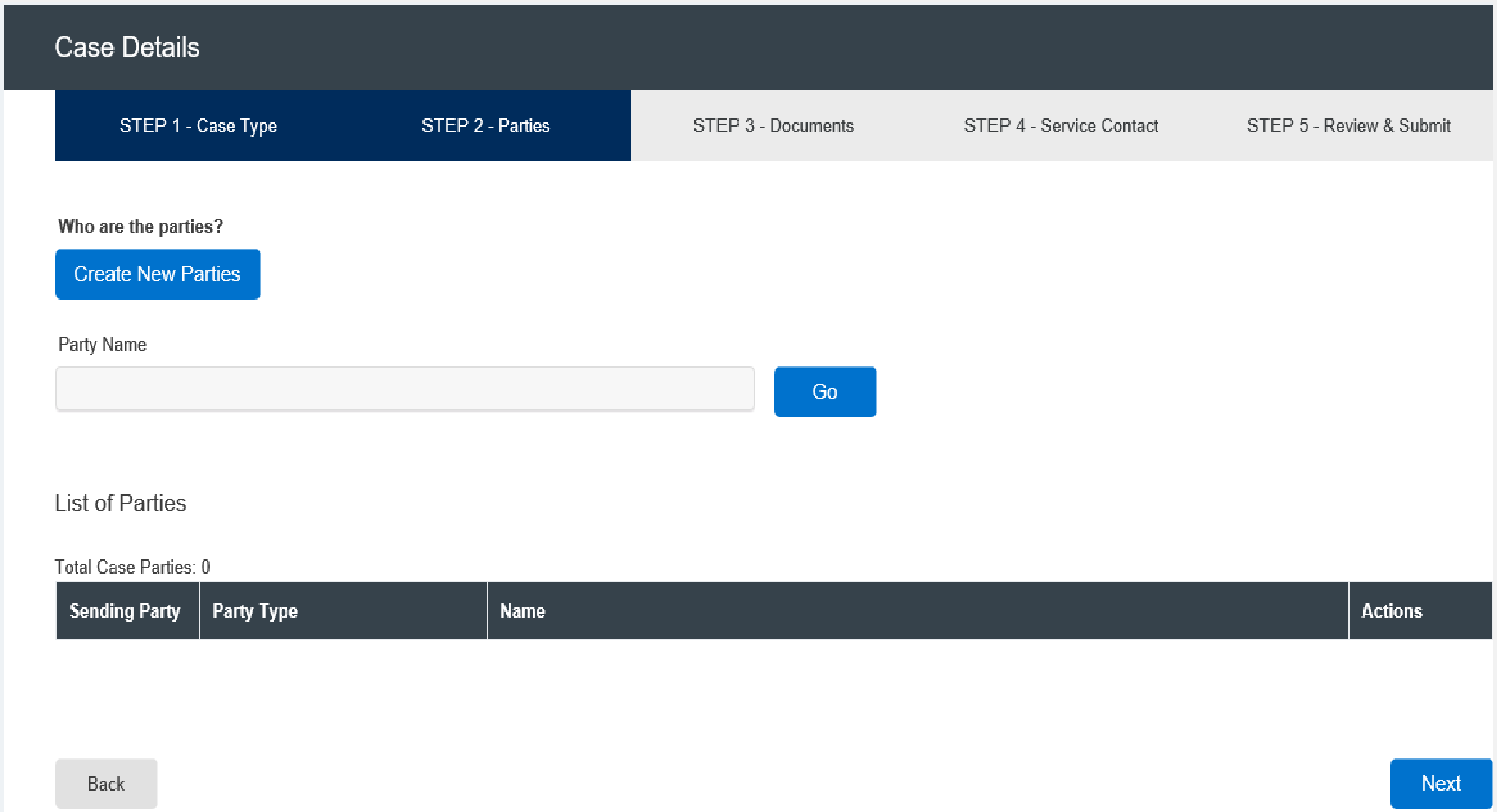
Error:
- Please add document to continue.
- Select Party Responsible for Filing Fees

FILING A NEW CASE:
Step 2 – Parties

File & Serve *Texas*™

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.



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.

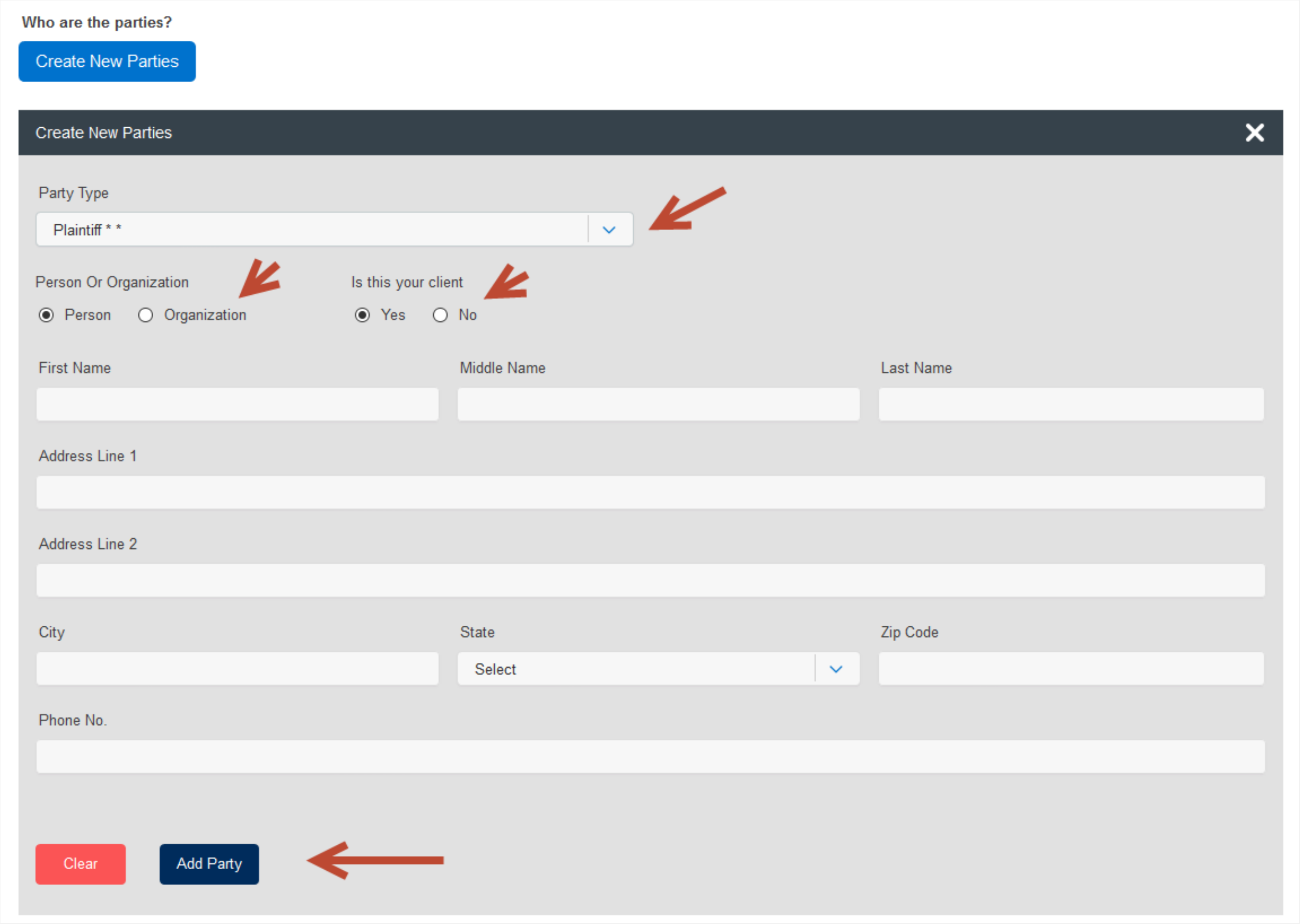
8. Click "**Add Party**" to add the party to the List of Parties.

9. Walk through these steps for all remaining parties until complete.

(see next slide)

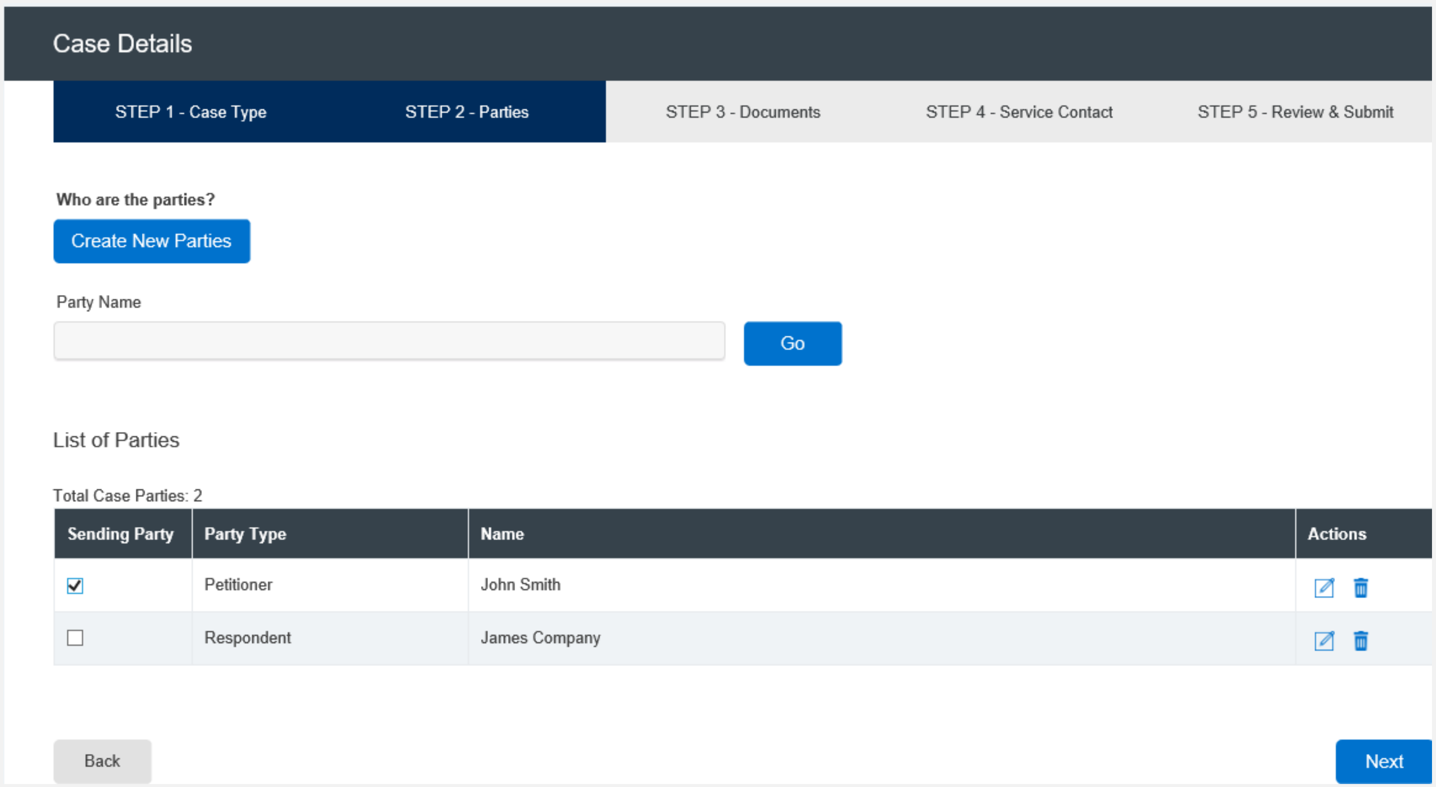
FILING A NEW CASE:
Step 2 – Parties *(continued)*

File & Serve Texas™



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.**"

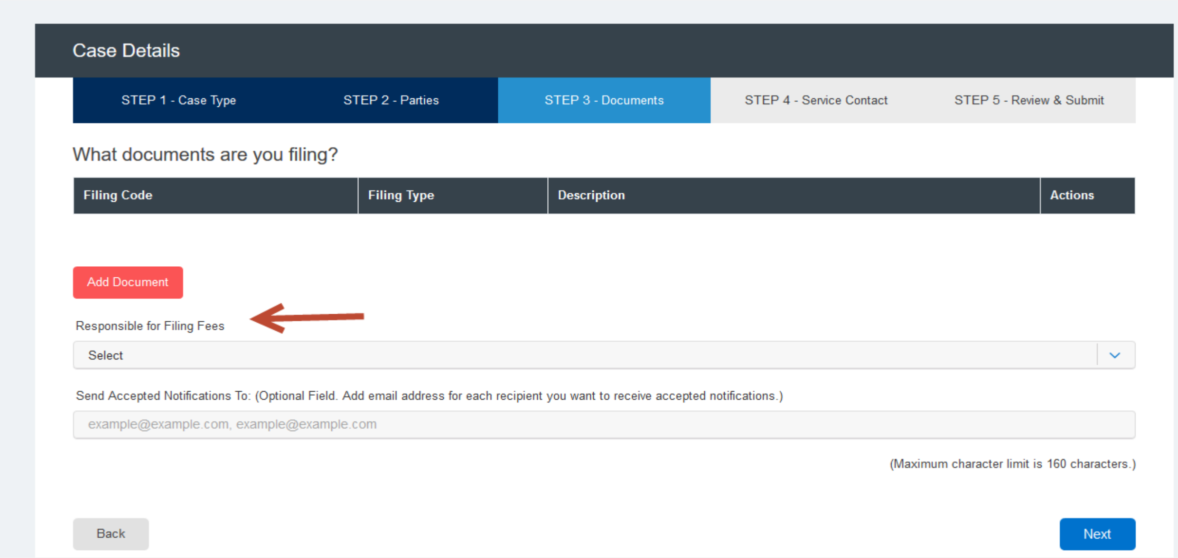


FILING A NEW CASE:
Step 3 – Documents

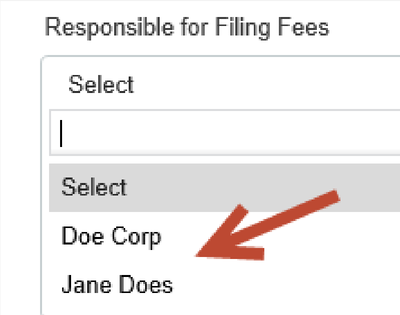
File & Serve *Texas*™

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.



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

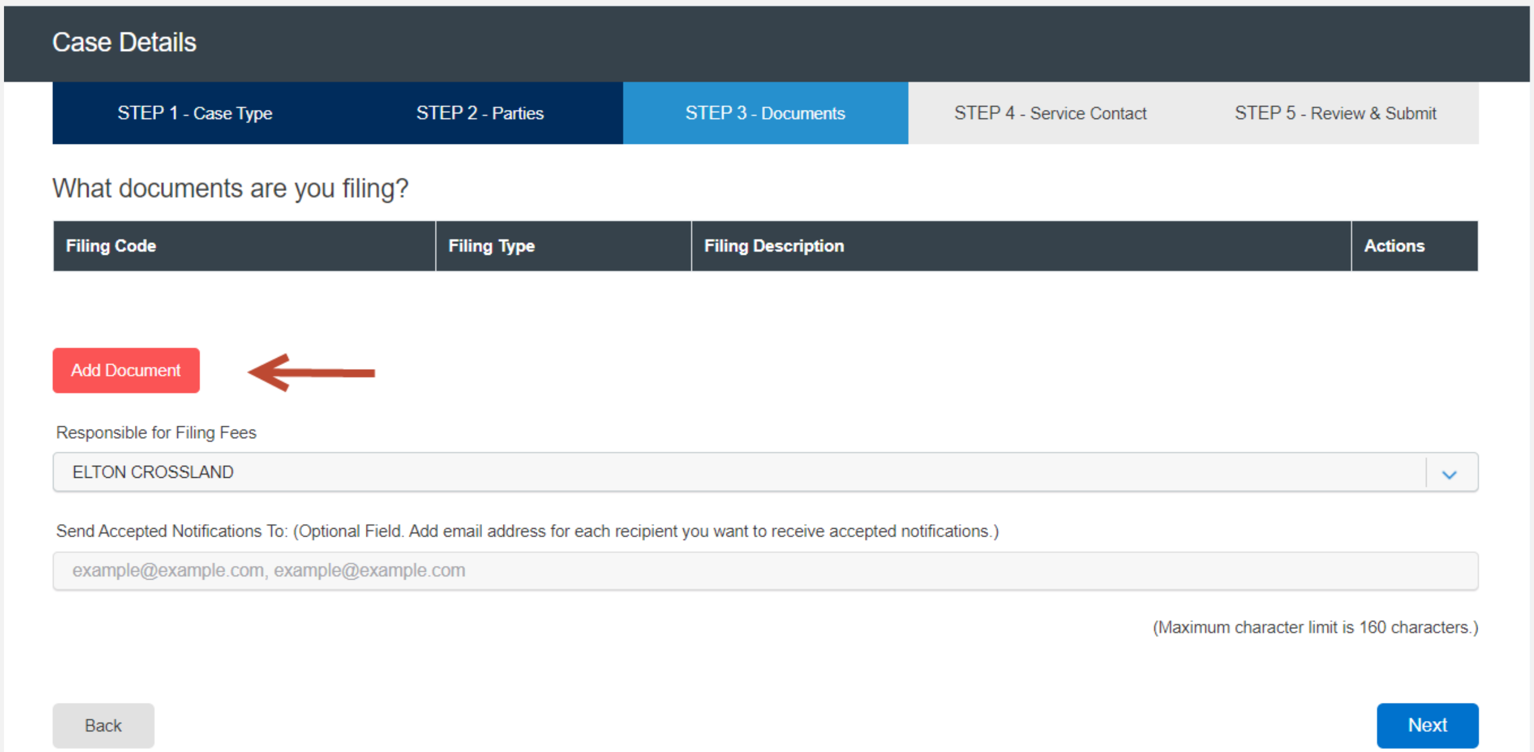


FILING A NEW CASE:
Step 3 – Documents *(continued)*

File & Serve Texas™

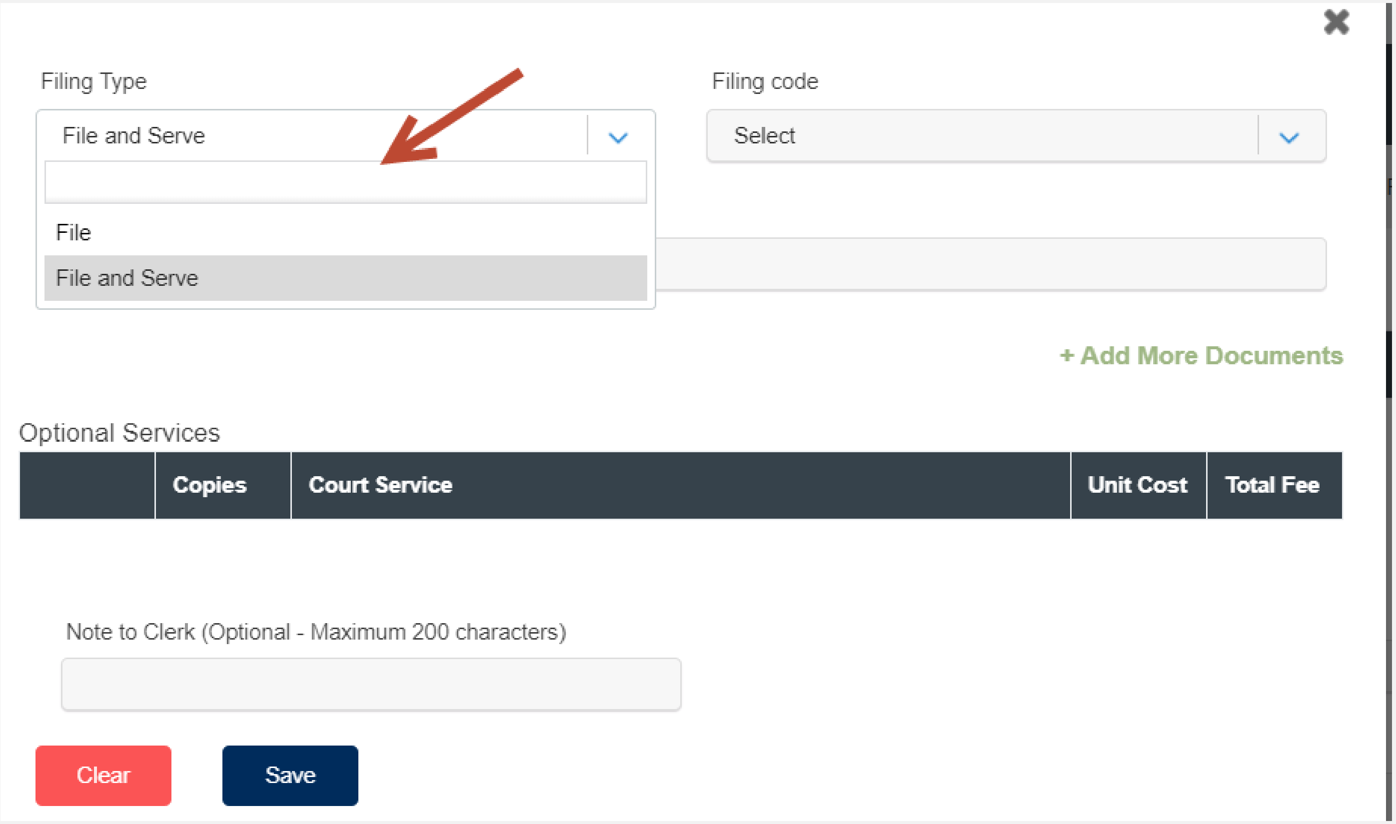
2. Click on “**Add Document**” to open up a new screen to begin uploading your documents.

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.



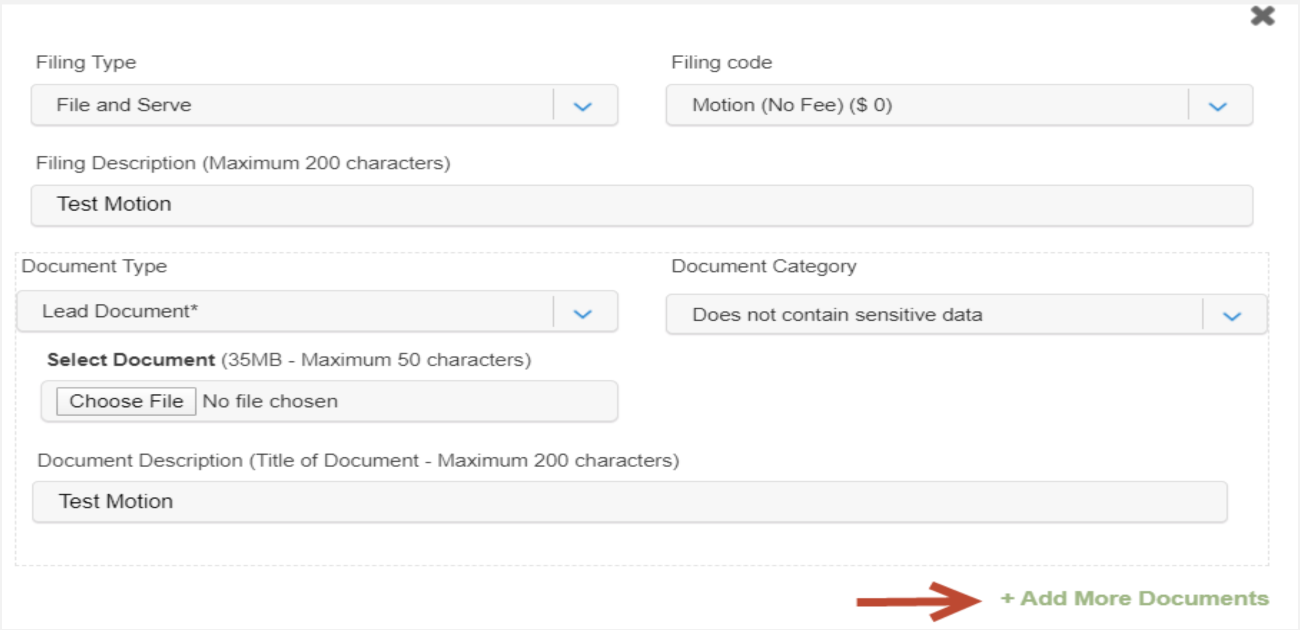
FILING A NEW CASE:
Step 3 – Documents *(continued)*

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**."



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.



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

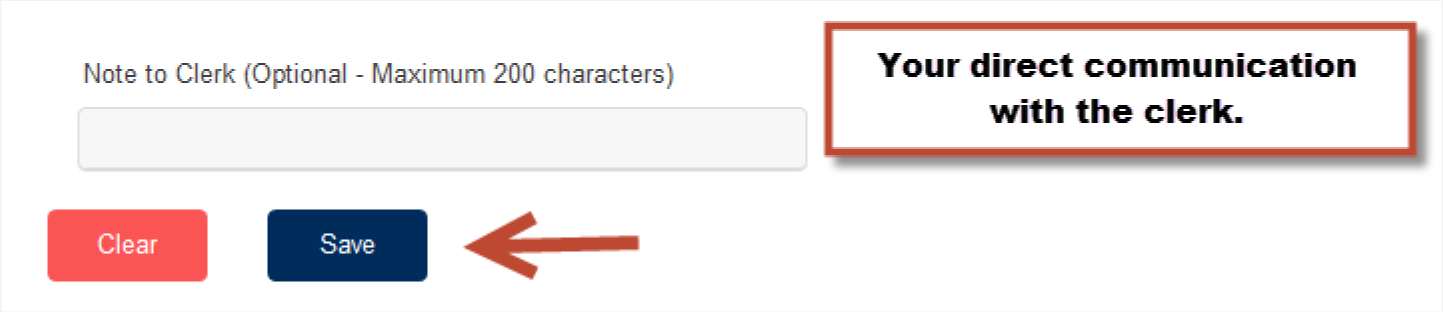
To upload and attach documents to be filed in the new case using File & Serve *Texas*, follow these steps:

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
☐		Issue Subpoena	8.00	0.00
☑	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.

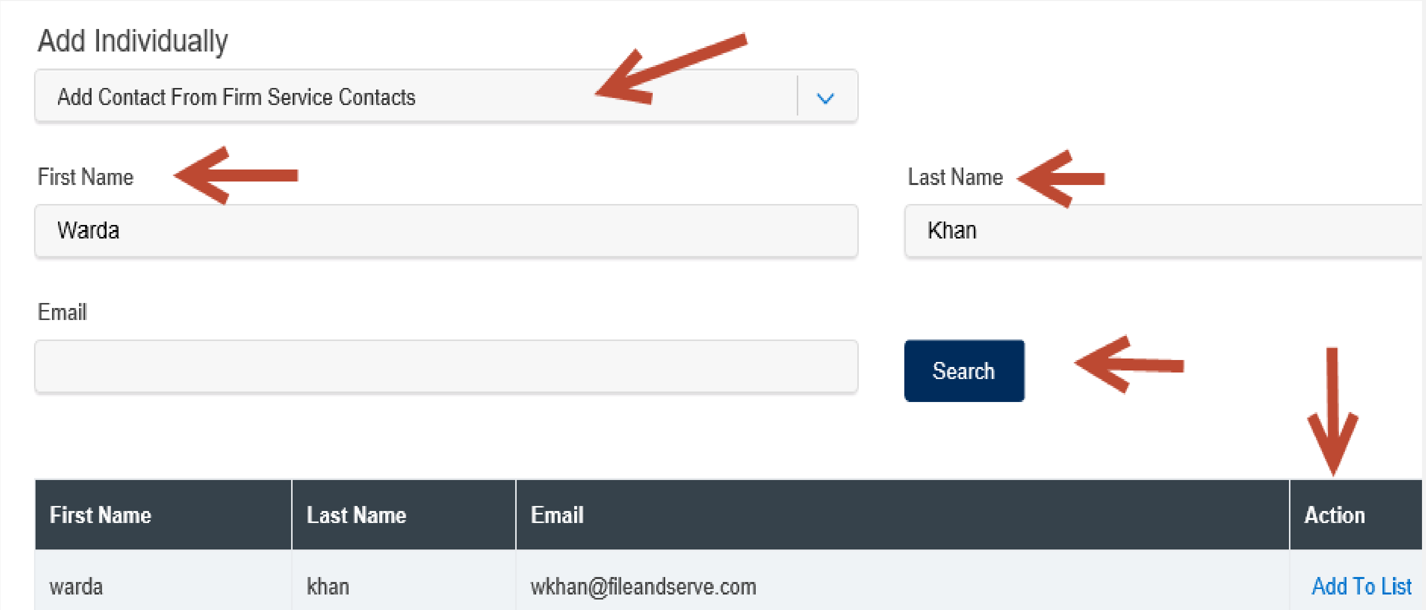


FILING A NEW CASE:
Step 4 – Service Contacts

File & Serve *Texas*™

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**."

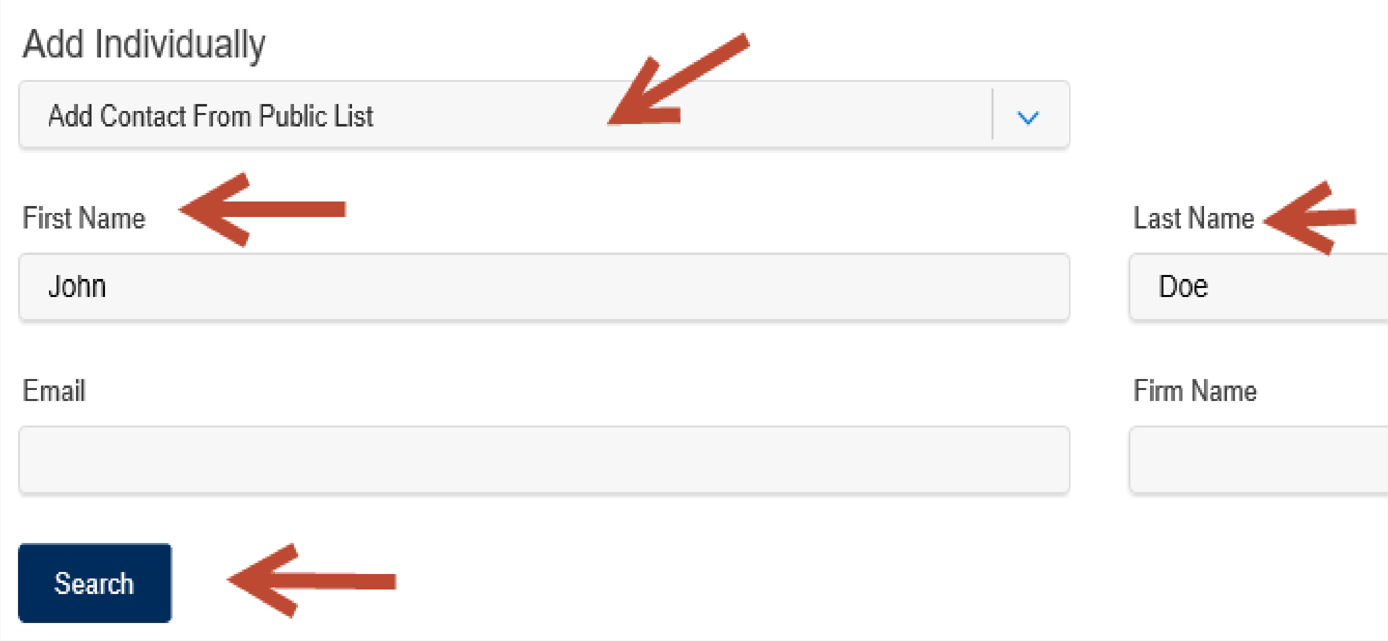


FILING A NEW CASE:
Step 4 – Service Contacts *(continued)*

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).

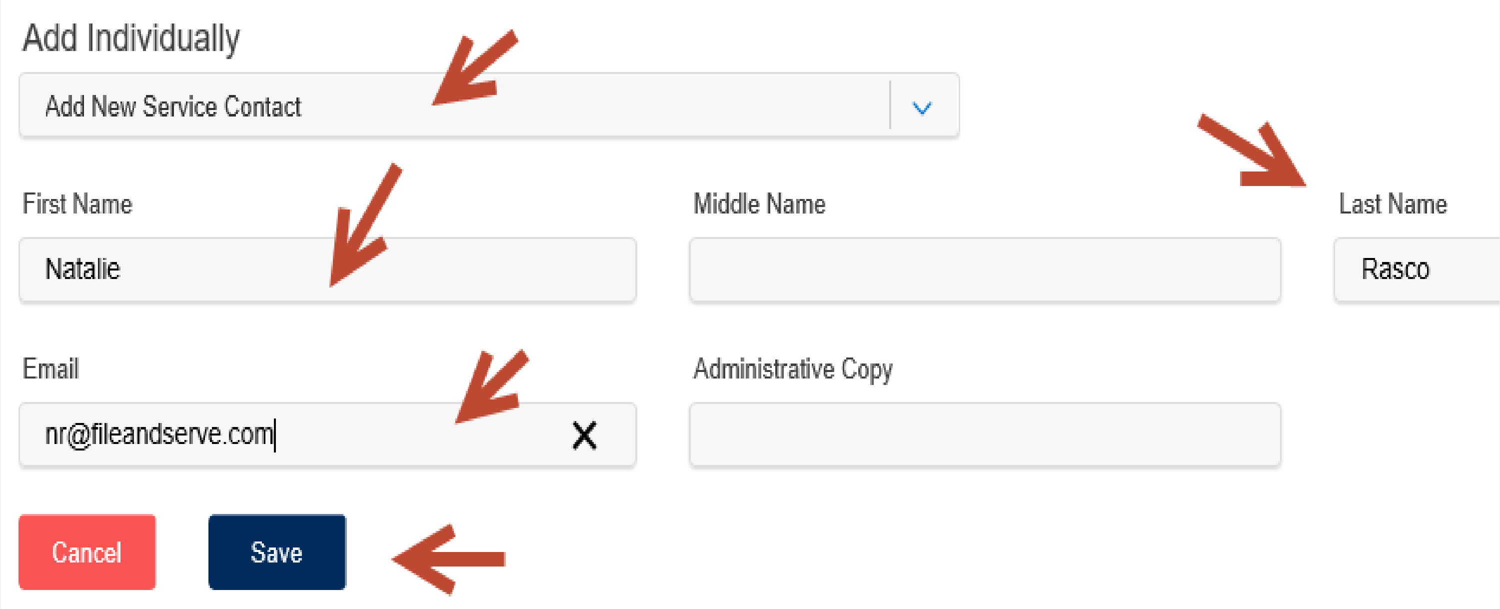
6. Select "**Search**" and "**Add to List**."



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**."



FILING A NEW CASE:
Step 4 – Service Contacts *(continued)*

File & Serve Texas™

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
☑	Natalie Rasco	nr@fileandserve.com	
☑	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

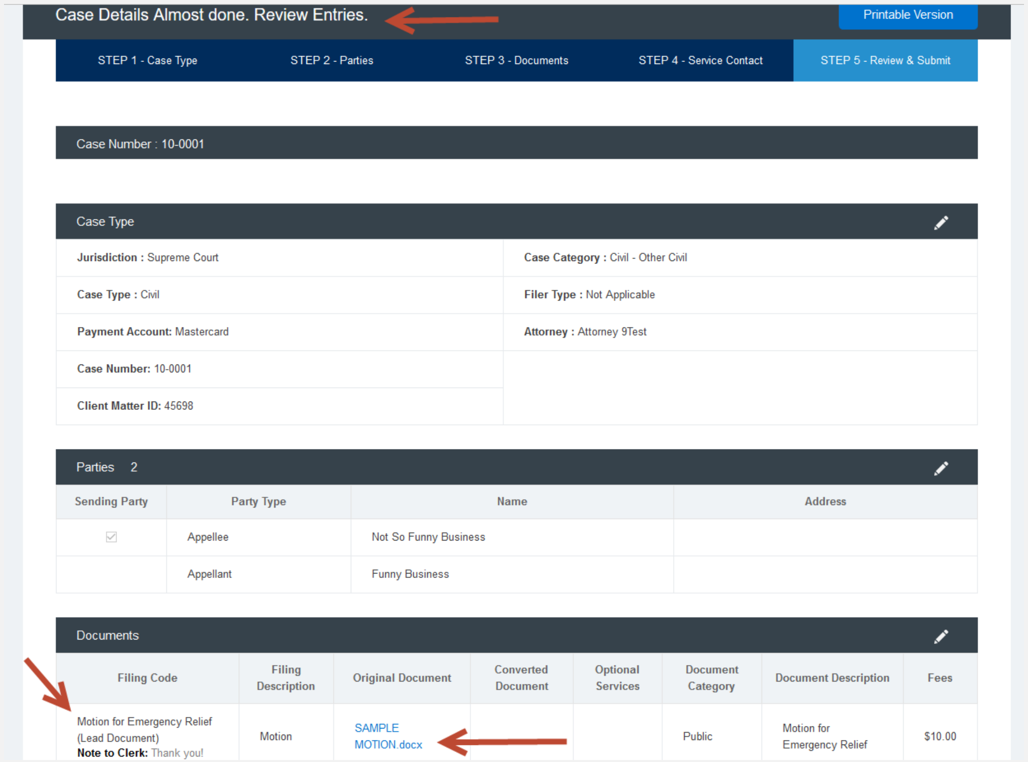
File & Serve *Texas*™

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.

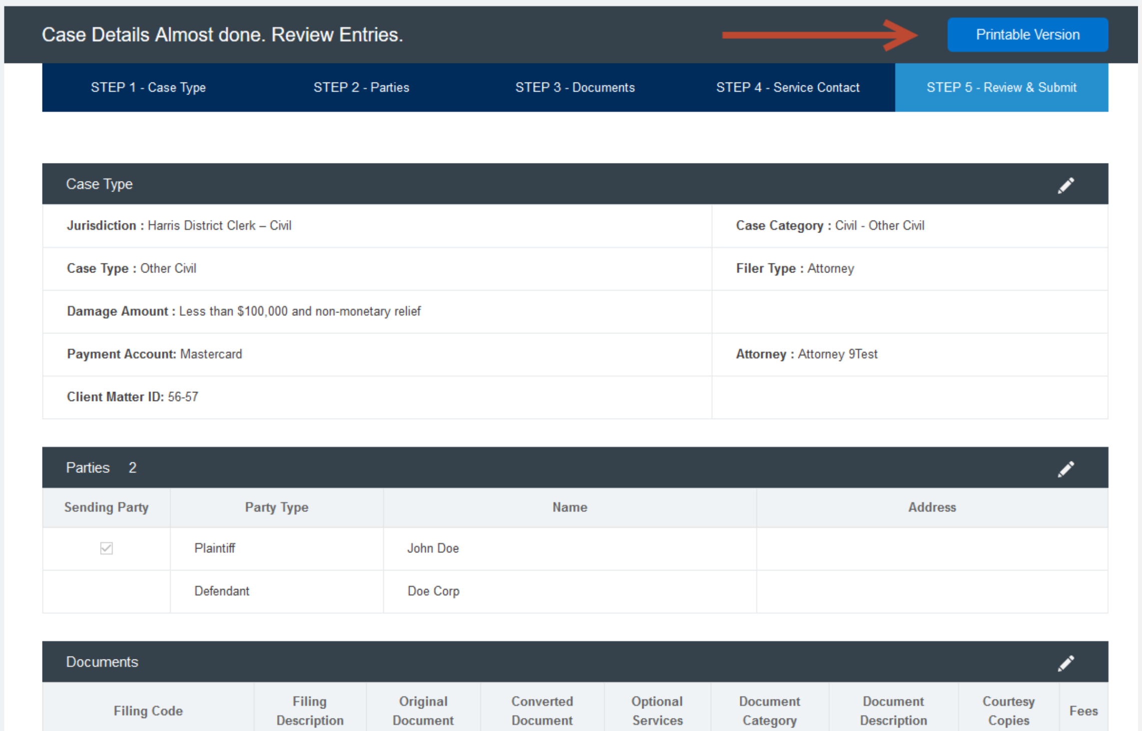
3. The Document section will display the Lead Document(s), its Attachment(s), the original format(s), converted format(s) (if applicable), the “Accepted Notifications”, and any Filing Code fees.

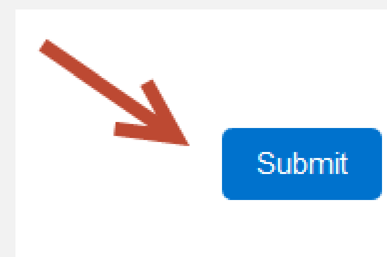


FILING A NEW CASE:
Step 5 – Review & Submit *(continued)*

File & Serve Texas™

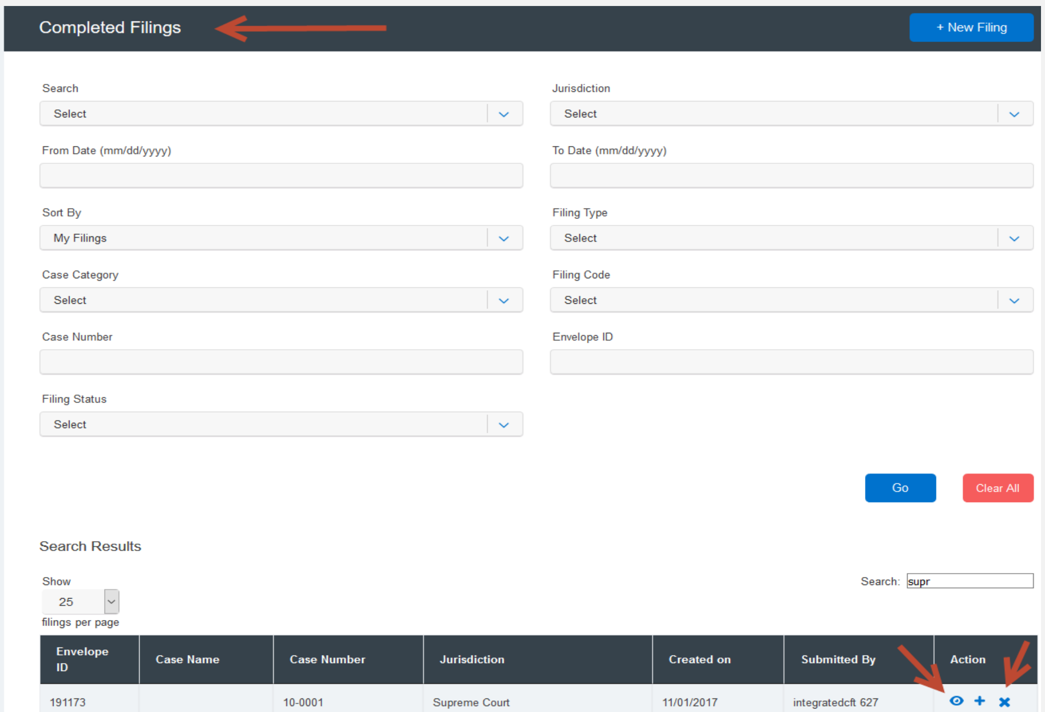
4. Make sure the correct party is listed next to the "**Responsible for Filing Fees**" section.
5. The Service Contact section will display, "**Yes**" for contacts to be served with this envelope.
6. All fees associated with the transaction will be listed for your review.
7. You can print the envelope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



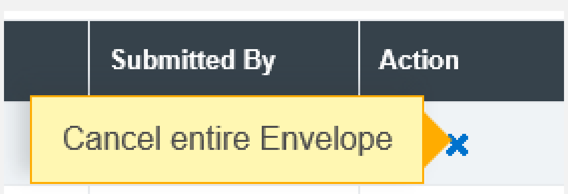


FILING A NEW CASE:
Step 5 – Review & Submit *(continued)*

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**".



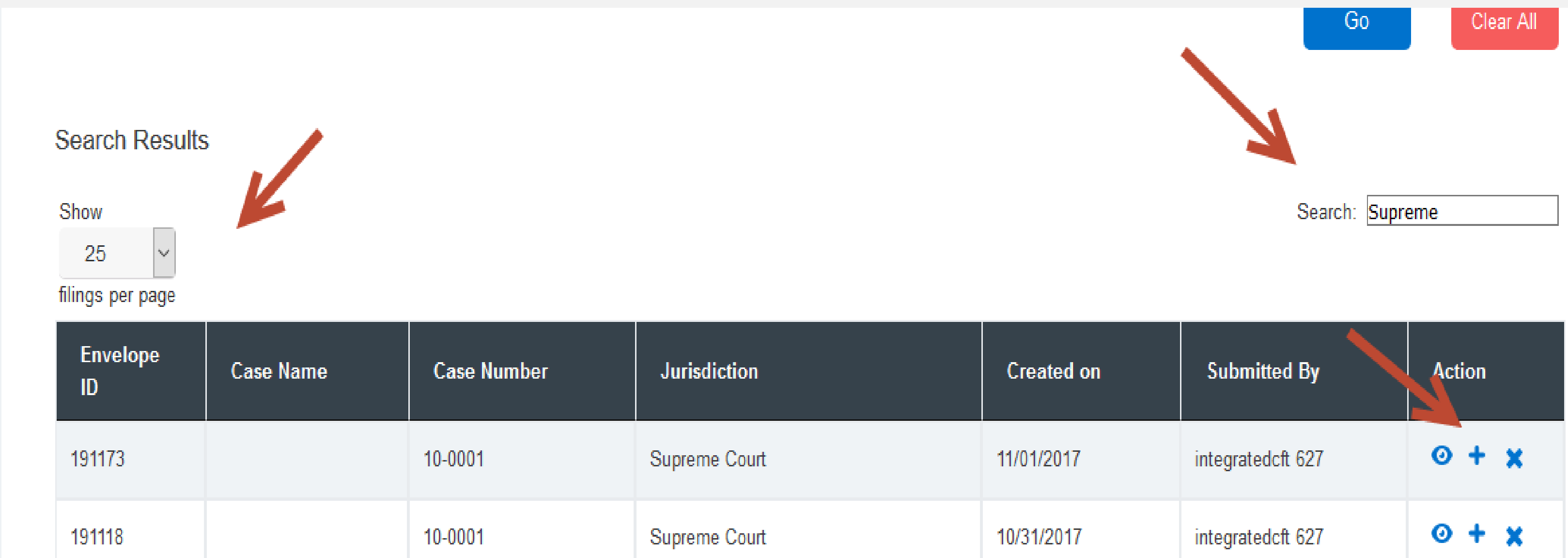
Clicking the "X" will cancel the envelope so you can start over.



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

File & Serve Texas™

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.**



LOCATING YOUR FILE-STAMPED DOCUMENT
In File & Serve Texas

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.

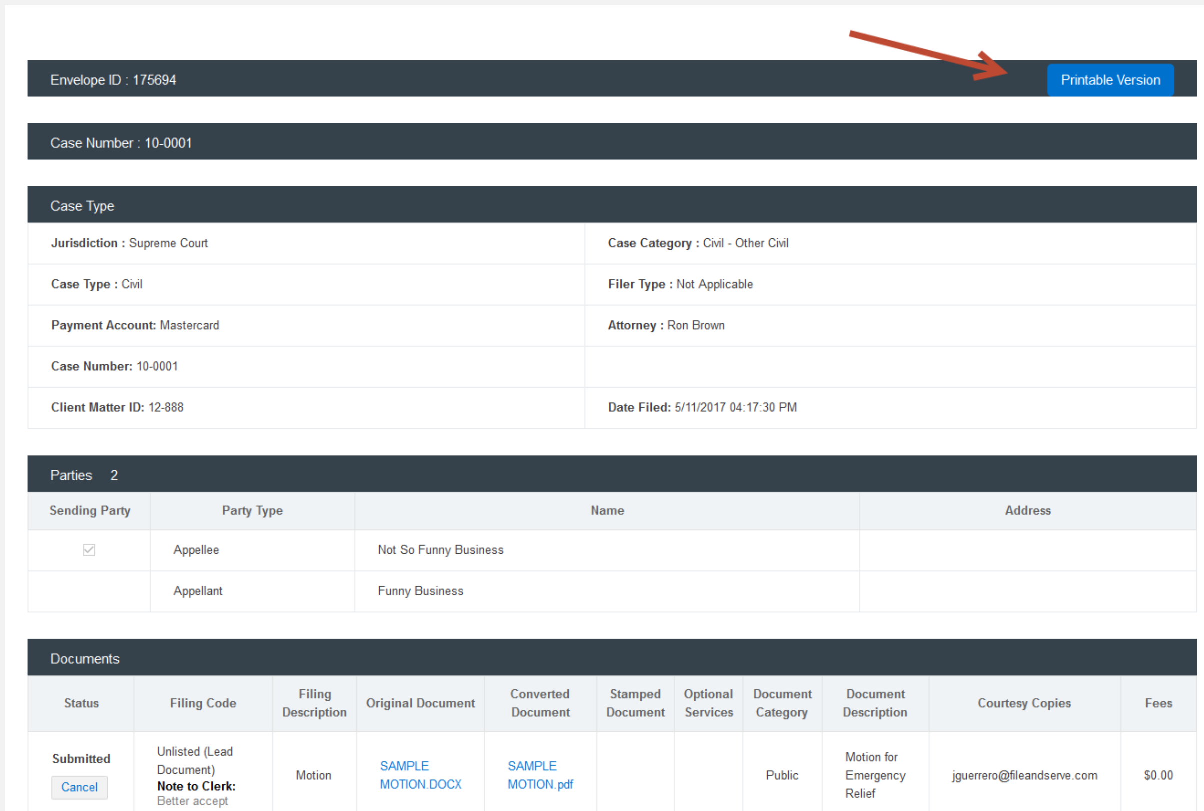
Documents

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

File & Serve Texas™

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



Envelope ID : 175694 | Printable Version

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
☑	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

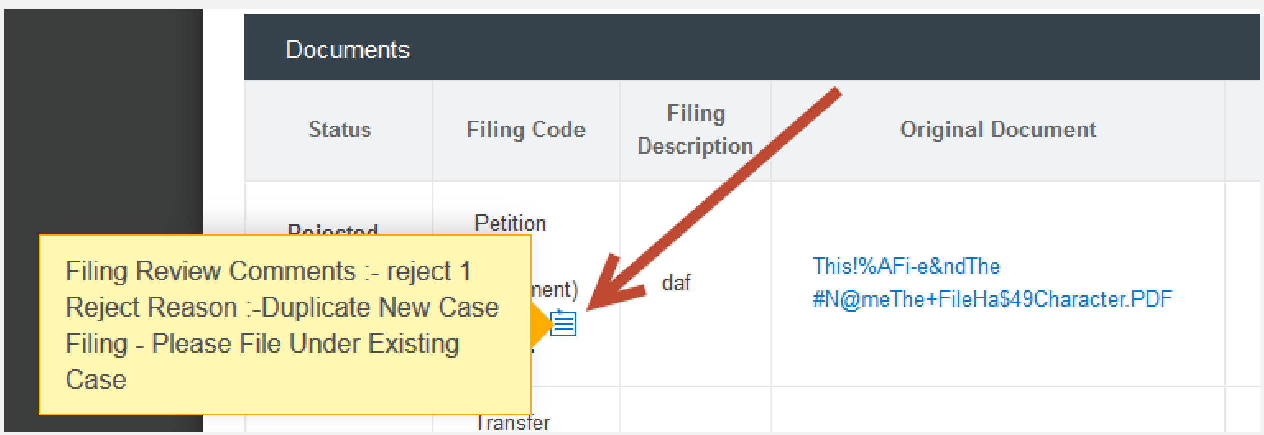
e-Serve	Name	Email	Public	Party Name	Status	Date Opened
Yes	[redacted]	[redacted]	Yes	Not So Funny Business	Sent	11/14/2016 8:35:12 AM

REVIEWING YOUR TRANSACTION SUMMARY *(continued)*

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

Documents

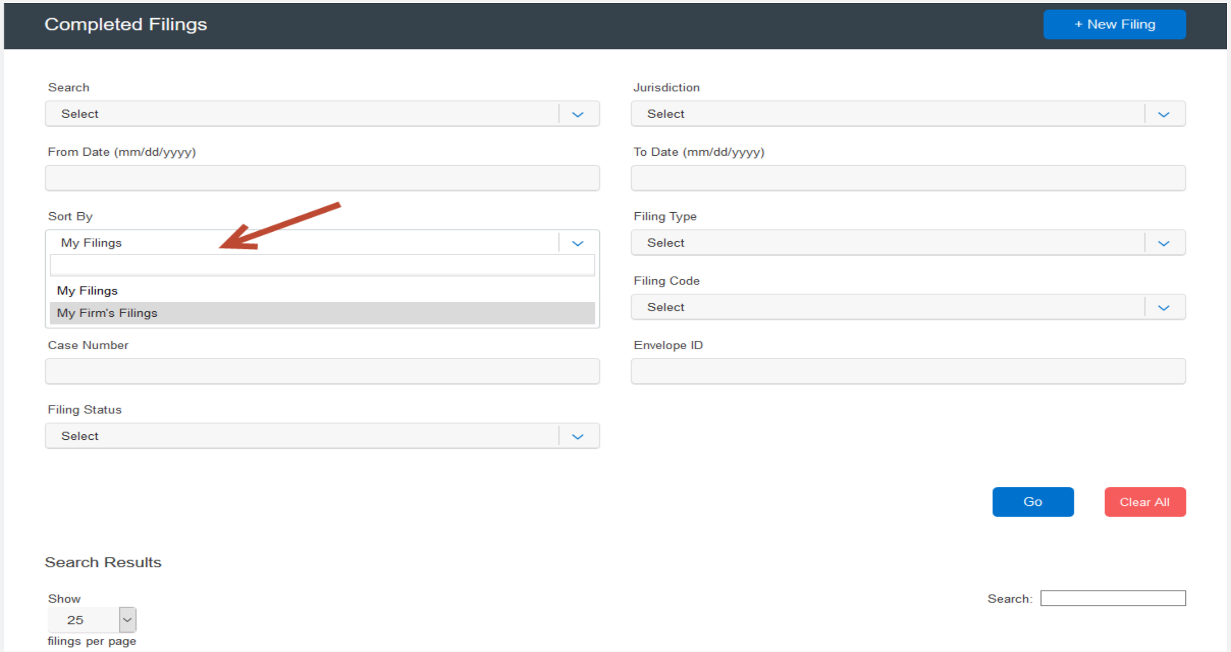
Status	Filing Code	Filing Description	Original Document	Converted Document	Stamped Document	Optional Services	Document Category	Document Description	Courtesy Copies
Rejected (11/08/2016)	Petition (Lead Document) **Note to Clerk:**	daf	This!%AFi-e&ndThe #N@meThe+FileHa$49Character.PDF				Does not contain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



REVIEWING SUBMITTED FILINGS

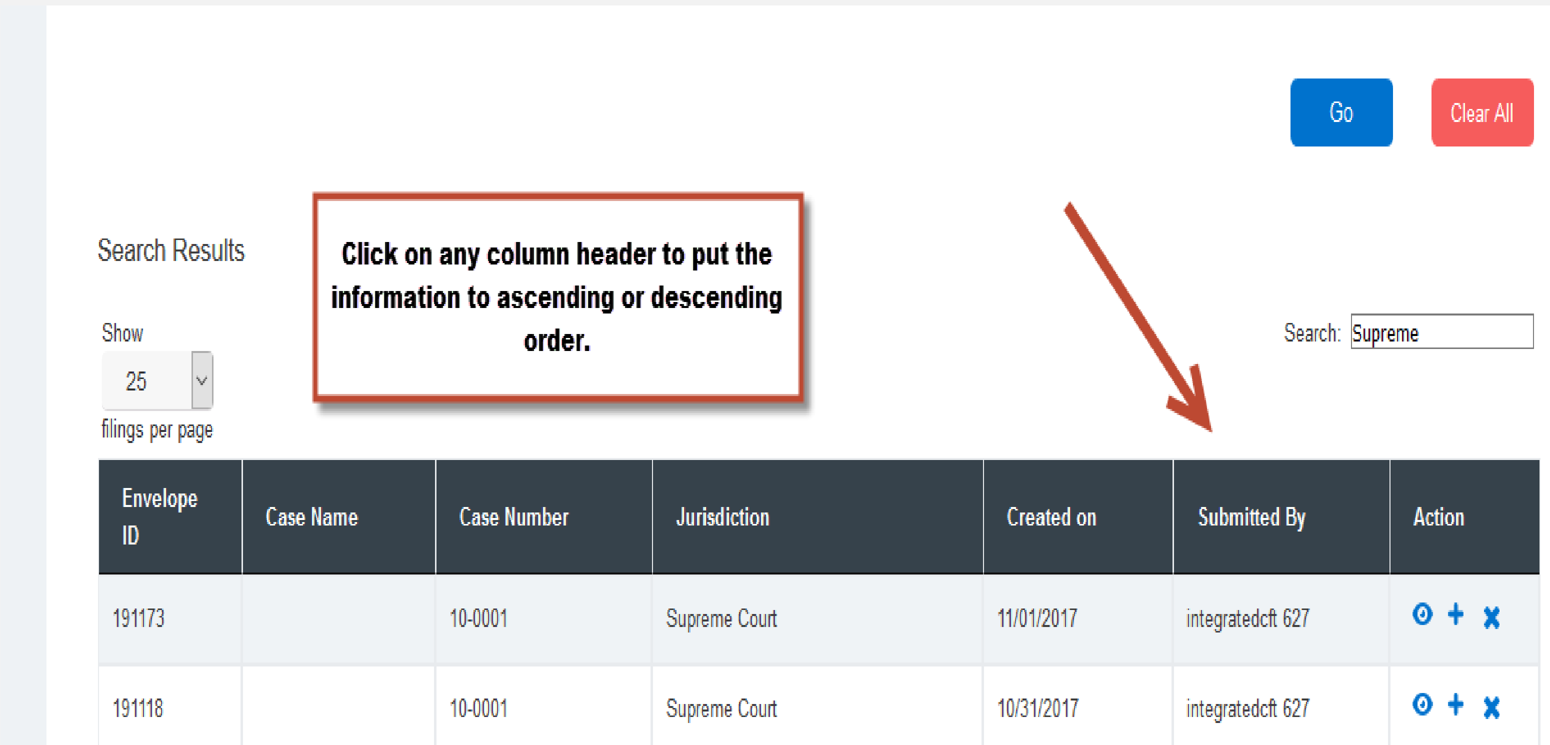
File & Serve Texas™

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**".



REVIEWING SUBMITTED FILINGS *(continued)*

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



REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS

File & Serve *Texas*™

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.

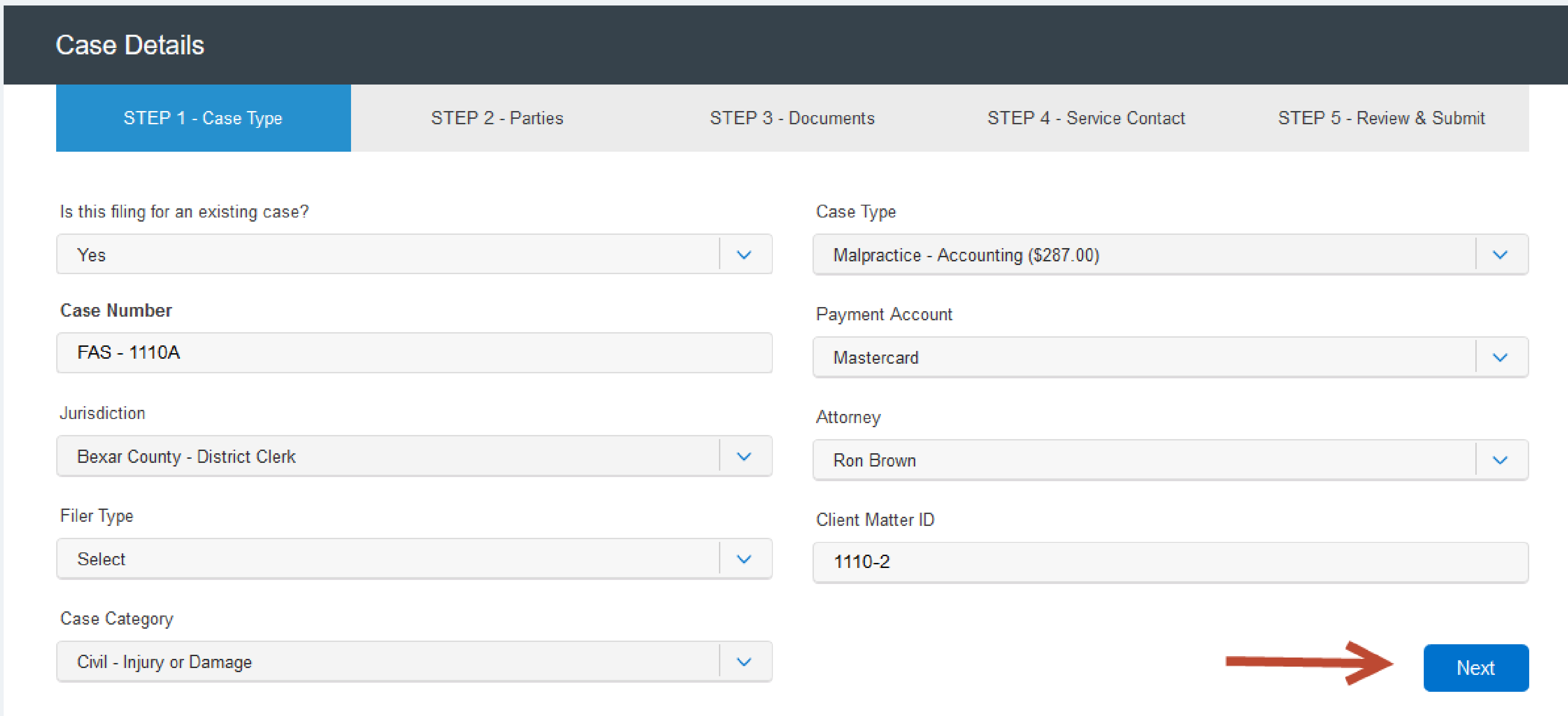
Search Result

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)*

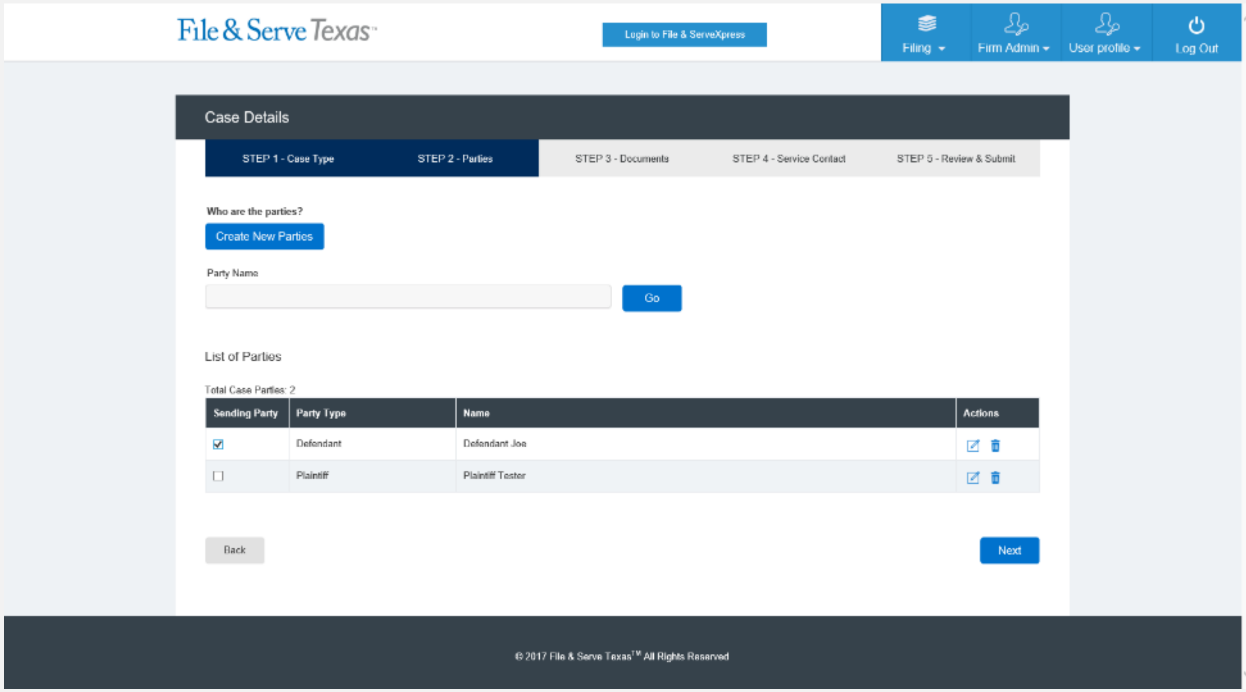
File & Serve Texas™

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)



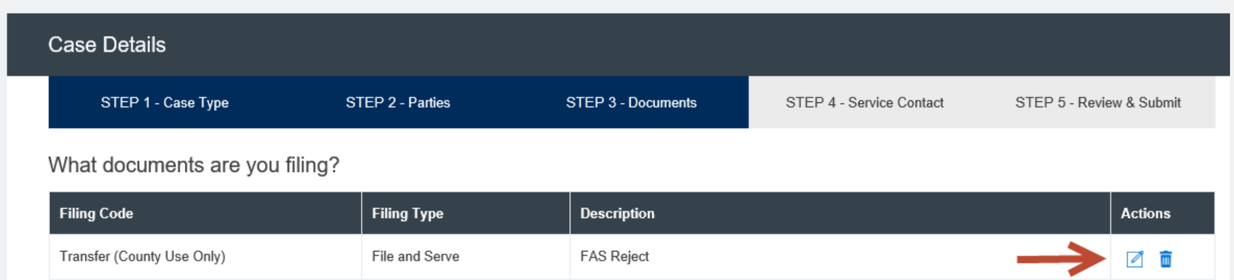
REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS *(continued)*

File & Serve Texas™



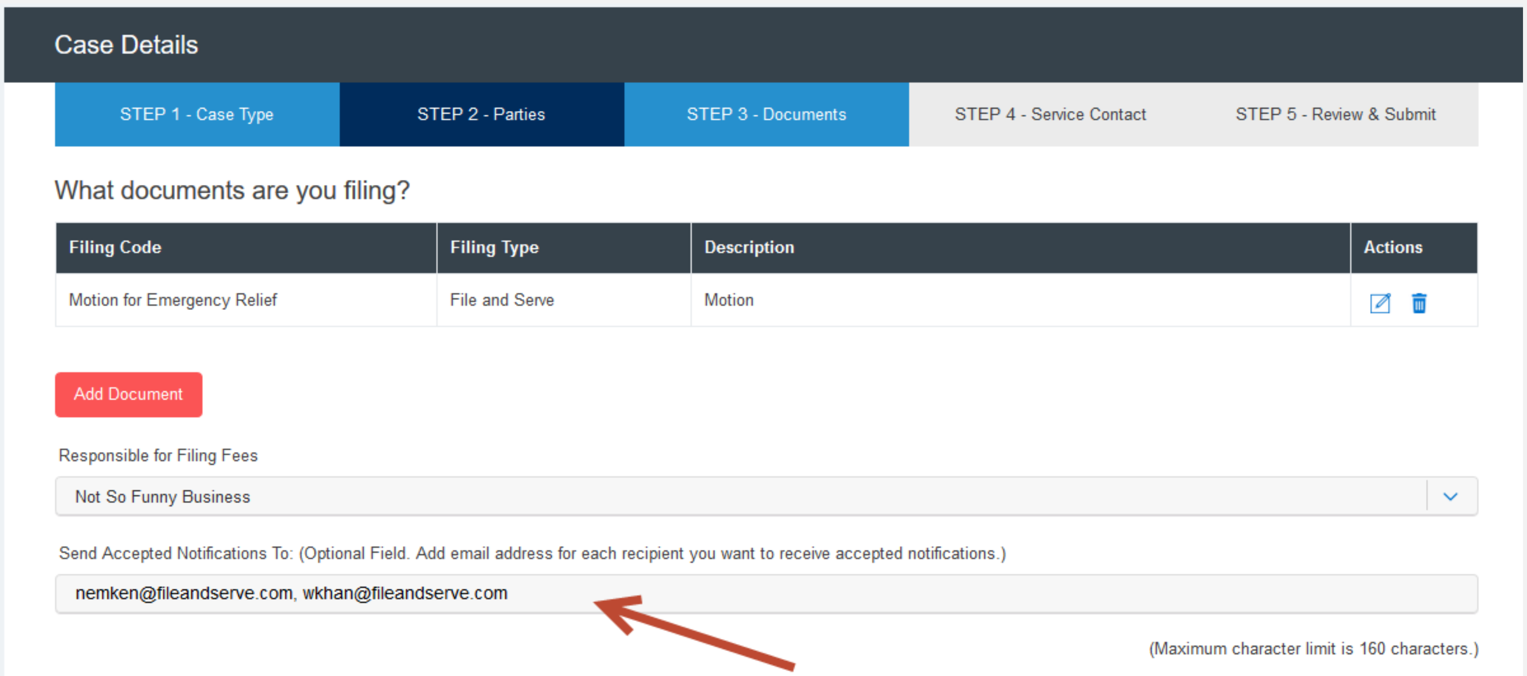
Step 2-Parties: Select the "Sending Party" if the box isn't selected.

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



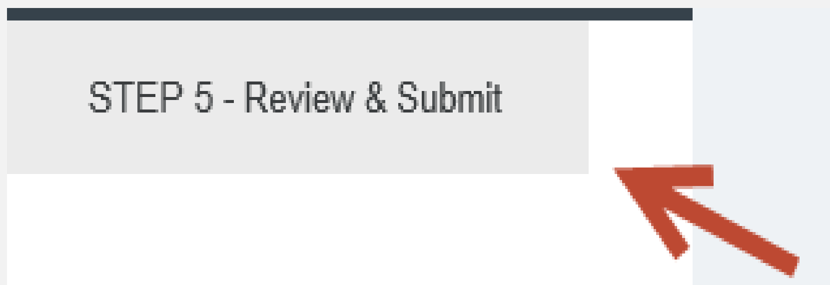
REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS *(continued)*

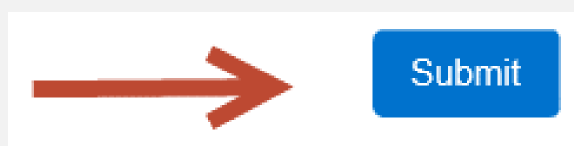
7. Click on the “**Browse**” button to grab the corrected document.
8. Enter your Note to Clerk.
9. Click on “**Update**” to save the corrected documents to the envelope.
10. Repeat the steps for all Lead Documents and corresponding attachments in the envelope that have been “Returned for Correction”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



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**.”

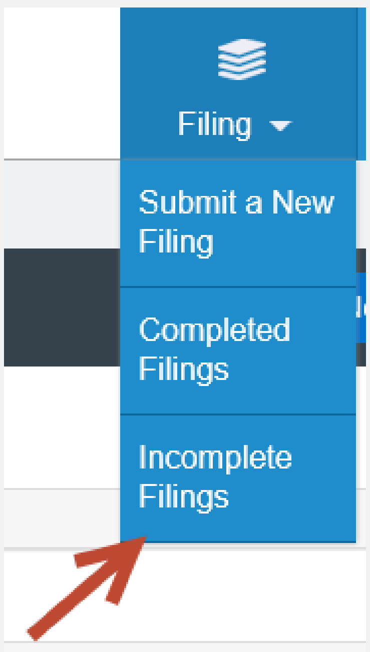


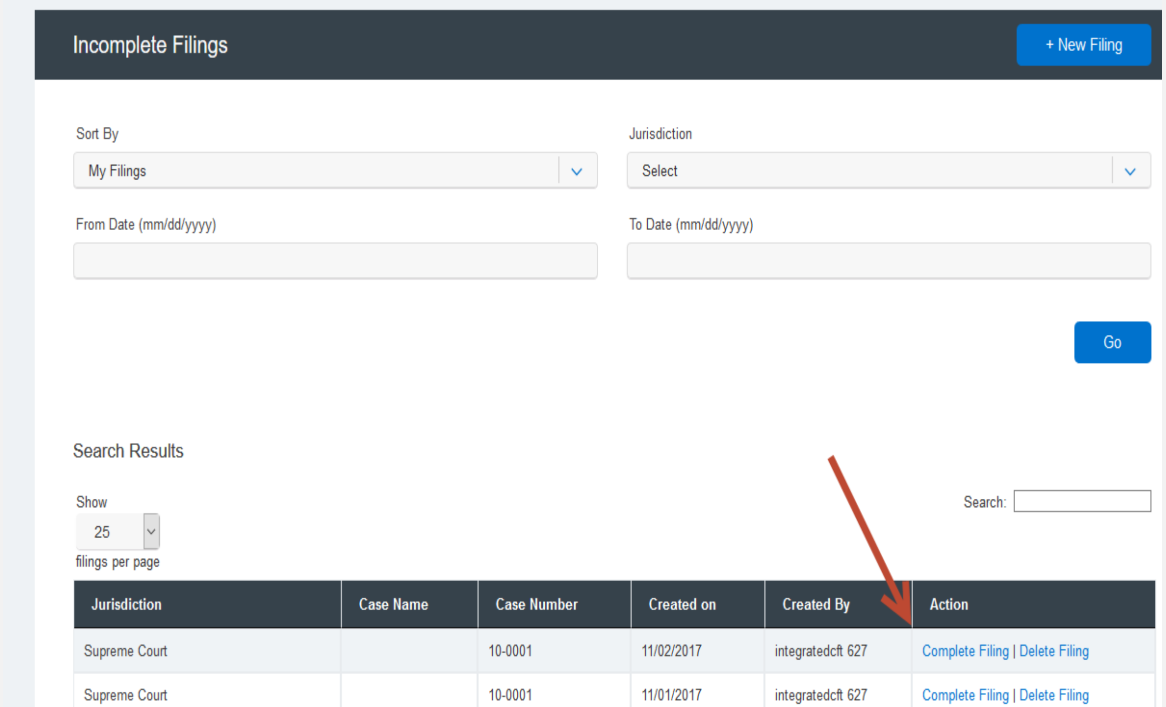


INCOMPLETE FILINGS

File & Serve *Texas*™

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.





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.