

File & Serve *Illinois*™

USER GUIDE
New Case Filing



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

- **File & Serve *Illinois* 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 *Illinois* 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://fileandservexpress.com/illinois/training.html> for more information.

SUBSEQUENT FILING OVERVIEW

The File & Serve *Illinois* 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 File & Serve *Illinois* 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 *Illinois*.
3. If you need assistance, call our Client Support line at 1-888-247-2051. They are available to help you 24/7/365.

File & Serve *Illinois*™

Logging in to File & Serve *Illinois*

Email

Password

Login

[Forgot Password](#) | [Register Now](#)

1. Open IE, Chrome, or Firefox go to www.fileandserveillinois.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 *Illinois* login page via www.fileandserveillinois.com
2. Enter your Username/Password and click “**Login**”.

File & Serve Illinois™

Home Training Contact Us Login to File & ServeXpress

Email

Password

Login

Forgot Password | Register Now

Welcome to eFiling and eService in
Illinois

THE FASTEST WAY TO FILE

For more information about eFiling in Illinois please [Click Here](#).

System Notifications

[Read More](#)

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.

File & Serve Illinois™

User Thomas

Inbox Filing

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 preferred jurisdictions](#)
Select

Case Category
Select

Case Type
Select

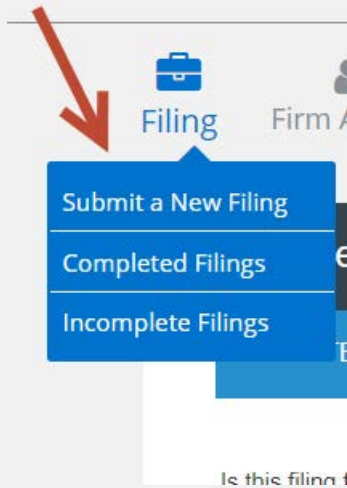
Payment Account
Select

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 *Illinois*, 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.

The screenshot shows a web form titled "Case Details" with a progress bar at the top indicating five steps: STEP 1 - Case Type (highlighted in blue), STEP 2 - Parties, STEP 3 - Documents, STEP 4 - Service Contact, and STEP 5 - Review & Submit. The form contains the following fields:

- Is this filing for an existing case?**: A dropdown menu with "No" selected.
- Jurisdiction**: A dropdown menu with "Clark County" selected.
- Case Category**: A dropdown menu with "Adoption" selected.
- Case Type**: A dropdown menu with "Adoption (\$65.00)" selected.
- Payment Account**: A dropdown menu with "Training Account" selected.
- Attorney**: A dropdown menu with "Dean Roberts" selected.
- Client Matter ID**: A text input field containing "abcd-123.456".

A blue "Next" button is located at the bottom right of the form.

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
Clark County

Case Category
Adoption

Case Type
Adoption (\$65.00)

Payment Account
Training Account

Attorney
Dean Roberts

Client Matter ID
abcd-123.456

Next

Payment Account

Training Account

Select

Training Account

Waiver

FILING A NEW CASE:

Step 1 – Case Type (*continued*)

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 : Clark County	Case Category : Adoption
Case Type : Adoption	
Payment Account: Training Account	Attorney : Dean Roberts
Client Matter ID: abcd-123.456	

Parties 0 

Sending Party	Party Type	Name	Address
Error: <ul style="list-style-type: none">At least one party needed to continue. 			

Documents 

Filing Code	Filing Description	Original Document	Converted Document	Optional Services	Document Category	Document Description	Fees
Responsible for Filing Fees :							
Send Accepted Notifications To:							
Error: <ul style="list-style-type: none">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 *Illinois* 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"/>	Plaintiff/Petitioner	John Smith	✎ 🗑
<input type="checkbox"/>	Defendant/Respondent	James Company	✎ 🗑

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

FILING A NEW CASE:

Step 3 – Documents

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? Max Envelope Size: 50 MB
Max File Size Per Document: 25 MB

Your Current Envelope Size: 0 KB

Filing Code	Filing Type	File Size	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


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

(Maximum character limit is 160 characters.)

Select

|

Select

Doe Corp 

Jane Does

FILING A NEW CASE:

Step 3 – Documents *(continued)*

2. Enter the email address(es) of legal team members you wish to receive a “Courtesy Notification”.
3. 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?

Your Current Envelope Size: 0 KB Max Envelope Size: 50 MB
Max File Size Per Document: 25 MB

Filing Code	Filing Type	File Size	Description	Actions
<p>Add Document</p>				

Responsible for Filing Fees

WELCO MANUFACTURING COMPANY

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.)

Back Next

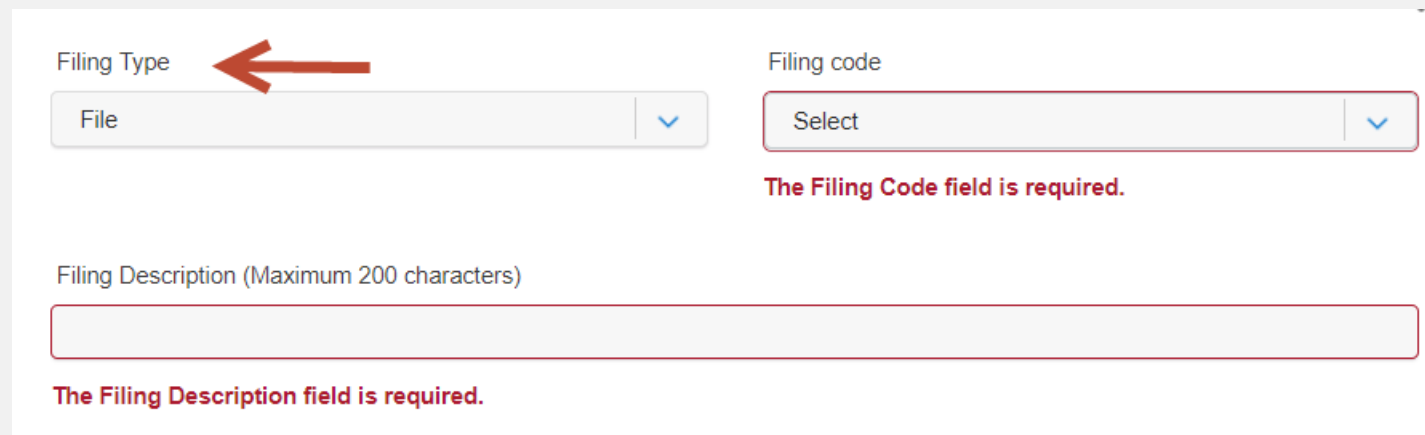
FILING A NEW CASE:


Step 3 – Documents *(continued)*

4. Filing Type: Defaulted to “File”.

Note: For New Case filings, you can only eFile. There is no option for eService.

File Transaction (Default for New Case)



Filing Type 

File

Filing code

Select

The Filing Code field is required.

Filing Description (Maximum 200 characters)

The Filing Description field is required.

FILING A NEW CASE:

Step 3 – Documents *(continued)*

5. Select the Filing Code.
6. Enter the Filing Description. This is the set of documents you are eFiling in this envelope. Note the character limit of 200.
7. Click on “**Browse**” or “**Choose**” to upload the Lead Document. Note the character limit for the file name is 50 characters. This includes, e.g., “.pdf”.
8. Select the Document Category.
9. Note the document size limit of 25MB; Envelope size is 50MB

The screenshot displays a web form for filing a new case. It features four main sections, each with a required field and a red error message:

- Filing Type:** A dropdown menu with "File" selected.
- Filing code:** A dropdown menu with "Select" selected. A red error message below it reads: "The Filing Code field is required."
- Filing Description:** A text input field with a placeholder "(Maximum 200 characters)". A red error message below it reads: "The Filing Description field is required."
- Lead Document:** A section with a dashed border containing a "Choose File" button and the text "No file chosen". A red arrow points to this area, and a red error message below it reads: "The Document File field is required."
- Document Category:** A dropdown menu with "Select" selected. A red arrow points to this dropdown, and a red error message below it reads: "The Document Category field is required."

FILING A NEW CASE:

Step 3 – Documents *(continued)*

10. Enter the Document Description. Note the character limit of 200.
11. If your Lead Document has an attachment(s), select “**+Add More Attachment(s)**” to upload.*

The screenshot shows a web form for filing a document. At the top right is a close button (X). The form has two dropdown menus: 'Filing Type' set to 'File' and 'Filing code' set to 'Petition (\$ 0)'. Below these is a text field for 'Filing Description (Maximum 200 characters)' containing 'Petition in Declaration in Support'. A dashed box contains the 'Lead Document' section, which includes a 'Choose File' button, a 'No file chosen' message, a link for 'SAMPLE DECLARATION.DOCX Download Original', and a 'Document Category' dropdown set to 'Non-Confidential'. Below this is another text field for 'Document Description (Title of Document - Maximum 200 characters)' containing 'Petition for John Doe v Corp'. At the bottom right, a red arrow points to a green button labeled '+ Add More Attachment(s)'.


*Please check the local rules for document guidelines and specifications.

FILING A NEW CASE:

Step 3 – Documents *(continued)*


12. Click, “**Browse**” or “**Choose File**” to upload the attachment.
13. Make sure to select the Document Category.
14. Enter the Document Description. Note the character limit of 200.


Attachment (Max File Size 25 MB ; File Name Not To Exceed 50 characters) ✕

Choose File No file chosen 


The Document File field is required.

No File Selected

Document Category 

Select 

The Document Category field is required.

Document Description (Title of Document - Maximum 200 characters) 

The Document Description field is required.

FILING A NEW CASE:

Step 3 – Documents *(continued)*

15. Some jurisdictions will offer “**Optional Services.**” If available, check the appropriate box(es) and enter the number of desired copies. Example: If you are filing a Jury Demand or Appearance, select optional service to apply fee.

Optional Services




	Copies	Court Service	Unit Cost	Total Fee
<input type="checkbox"/>	<input type="text"/>	(Misc.) - Jury Demand - 12 Person	212.50	0.00
<input checked="" type="checkbox"/>	1	(Misc.) - Jury Demand - 6 Person	106.25	106.25

16. Next, enter a Note to Clerk. This is your “**direct**” communication with the court clerk.
17. 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 3 – Documents *(continued)*

- 18. You can begin to upload additional Lead Documents and Attachments, if necessary. Simply click on “**Add Document**” and follow the same steps.



Note: You can view the Maximum File Size Per Document, Current Envelope Size and File Size per lead document as shown below.

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?

Your Current Envelope Size: 141.765 KB Max Envelope Size: 50 MB
Max File Size Per Document: 25 MB

Filing Code	Filing Type	File Size	Description	Actions
Motion	File	141.765 KB	motion	 

Add Document ←

Responsible for Filing Fees
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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.)

Amount In Controversy ←
0.00

When the filer selects a Filing Code which requires an Amount in Controversy, a new field for that amount will be displayed.

FILING A NEW CASE:

Step 3 – Documents *(continued)*

19. Click “**Next**” to move to Step 4-Service Contact. Since this is a **File Only** transaction you will receive the following message and can click **Next to move to step 5**.

The screenshot displays the 'Case Details' interface. At the top, a dark grey header contains the text 'Case Details'. Below this is a horizontal navigation bar with five steps: 'STEP 1 - Case Type', 'STEP 2 - Parties', 'STEP 3 - Documents', 'STEP 4 - Service Contact', and 'STEP 5 - Review & Submit'. The 'STEP 4 - Service Contact' tab is highlighted in blue. The main content area is dark grey and contains the text 'Who should be notified about this filing?' and 'Current Notice List: Parties will be e-Served and notified.' Below this is a table with four columns: 'e-Serve', 'Name', 'Email Address', and 'Action'. The table is currently empty. At the bottom left, there is a section titled 'Add Individually' with a button 'Add Contact From Firm Service Contacts' and input fields for 'First Name' and 'Email Address'. A white modal box is centered on the screen with the text: 'This Is A File Only Transaction. Click Next To Continue.'

FILING A NEW CASE:


Step 5 – Review & Submit

To review the envelope details prior to submitting to the court using File & Serve *Illinois*, 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 Type 

Jurisdiction : Clark County	Case Category : Chancery
Case Type : Partnership Dissolution	
Payment Account: Training Account	Attorney : Dean Roberts
Client Matter ID: abcd-123.456	


Parties 2 

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


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. All fees associated with the transaction will be listed for your review.
6. You can print the envelope details by selecting “**Printable Version**.”
7. You must select “**Submit**” for immediate filing to the court and service on the selected contacts.

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

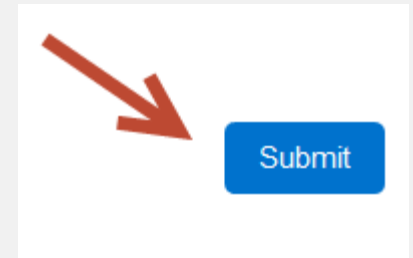
STEP 1 - Case Type STEP 2 - Parties STEP 3 - Documents STEP 4 - Service Contact **STEP 5 - Review & Submit**

Case Type 

Jurisdiction : Clark County	Case Category : Chancery
Case Type : Partnership Dissolution	
Payment Account: Training Account	Attorney : Dean Roberts
Client Matter ID: abcd-123.456	

Parties 2 

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



FILING A NEW CASE:

Step 5 – Review & Submit

8. After you click “**Submit**,” you will receive the following message with your envelope ID. Please refer to the next slide for more information on the “process service, skip trace or courtesy copy” noted in the envelope ID message.

