

File & Serve *Texas*™

Service Contacts



File & Serve *Texas*

SERVICE CONTACTS USER GUIDE

TABLE OF CONTENTS

File & Serve <i>Texas</i> Resources	3
Filing a New Case: Adding Service Contacts	4
Filing a New Case: Removing Service Contacts	9
Filing into an Existing Case: Verifying Service Contacts	11
Filing into an Existing Case: Adding Service Contacts	13
Filing into an Existing Case: Removing Service Contacts	20
Helpful Tips with Service Contacts	23

FILE & SERVE *TEXAS* RESOURCES

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.

FILING A NEW CASE: Adding Service Contacts

Step 4 – Service Contacts

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

Adding a Firm Service Contact:

1. To add a support staff member(s) from your firm, select **“Add Contact from 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.”**

The screenshot shows the 'Add Individually' section of the File & Serve Texas interface. At the top, there is a button labeled 'Add Individually' with a red arrow pointing to it. Below this is a dropdown menu with the text 'Add Contact From Firm Service Contacts' and a downward arrow. Underneath the dropdown are two input fields: 'First Name' with the text 'Ann' and 'Last Name' with the text 'Rose'. Below these is an 'Email Address' input field. To the right of the email field is a blue 'Search' button with a red arrow pointing to it. Below the search area is a table with the following data:

First Name	Last Name	Email Address	Action
Ann	Rose	Arose7153@gmail.com	Add To List

A red arrow points down to the 'Add To List' link in the table.

FILING A NEW CASE: Adding Service Contacts

Step 4 – Service Contacts (continued)

Adding a Contact from the Public List:

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.**” Please see next slide for additional screen shots.

Who should be notified about this filing?

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

e-Serve	Name	Email Address	Action
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Add Individually

Add Contact From Firm Service Contacts

Add Contact From Firm Service Contacts

Add New Service Contact

Add Contact From Public List

Last Name

Email Address

Search

FILING A NEW CASE: Adding Service Contacts

Step 4 – Service Contacts (continued)

Adding a Contact from the Public List:

Add Individually

Add Contact From Public List ▼

First Name

Elizabeth

Last Name

None

Email Address

Firm Name

Search



First Name	Last Name	Email Address	Action
Elizabeth	None	elizabeth@none.org.uk	Add To List

FILING A NEW CASE: Adding Service Contacts

Step 4 – Service Contacts (continued)

Adding a New Service Contact:

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 web form titled "Add Individually". At the top left, a red arrow points to the "Add Individually" text. Below it is a dropdown menu with "Add New Service Contact" selected and a blue downward arrow. The form has several input fields: "First Name" with "Lacy" entered, "Middle Name" (empty), "Last Name" with "Jones" entered, "Email Address" with "lacyjones@fakelawfirm.com" entered, and "Administrative Copy" (empty). At the bottom, there are two buttons: a red "Cancel" button and a dark blue "Save" button, with a red arrow pointing to the "Save" button.

FILING A NEW CASE: Adding Service Contacts

Step 4 – Service Contacts (continued)

9. They will be added to the instant service list and to the **“Firm Service Contacts”** under your firm.
10. You can easily search for them under **“Add Contact From Firm Service Contacts”** for any future cases.

FILING A NEW CASE: Removing Service Contacts


To remove a service contact from the service list during the instant transaction, i.e., when you add them, follow these steps:





1. Click on the “trash can” icon next to the service contact under the Action column.
2. If you have accidentally deleted a New Service Contact that you added to the service list, search for them under “**Add Contact from Firm Service Contacts**” to re-add them to the list.

Note: You can only edit a Firm Service Contact. Click on the “pencil icon” to edit.

Who should be notified about this filing?

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







e-Serve	2	Name	Email Address	Action
<input checked="" type="checkbox"/>		Ann Rose	Arose7153@gmail.com	 
<input checked="" type="checkbox"/>		Lacy Jones	lacyjones@fakelawfirm.com	 


FILING A NEW CASE: Removing Service Contacts (*continued*)

- If you have clicked on the pencil icon to edit a Firm Service Contact, edit the information on the service contact. When the edit(s) is complete, click “**Save.**” They will be returned to the service list with the new edit(s).

Remember: You can only edit a Firm Service Contact. You can remove an attorney added from the Public List during the transaction by clicking on the “trash can” icon.

e-Serve	2	Name	Email Address	Action
<input checked="" type="checkbox"/>		Ann Rose	Arose7153@gmail.com	 
<input checked="" type="checkbox"/>		Lacy Jones	lacyjones@fakelawfirm.com	 

Add Individually

Add New Service Contact 

First Name

Ann

Middle Name

Last Name

Rose

Email Address

Arose715345@gmail.com

Example: Edited Email

Administrative Copy

Cancel

Save



FILING INTO AN EXISTING CASE: Verifying Service Contacts

Step 4 – *Service Contacts*

To verify service contacts in an existing case using File & Serve *Texas*, follow these steps:

1. The service list will be auto-populated.
2. You will be able to view the number of contacts on the service list next to the “**e-Serve**” column.
3. You can keep the boxes checked under “**e-Serve**” for those contacts you would like to serve in this transaction.
4. You can de-select the boxes under “**e-Serve**” for those contacts you would like to NOT serve in this transaction.
5. Click on the drop-down menu under the **Attach** column to select either the case or a case party.*
The system will automatically “attach” them and save the selection. You must complete this step in order for the contact to “stick” to the service list.

(See next slide for screen shot)

FILING INTO AN EXISTING CASE: Verifying Service Contacts

Step 4 – Service Contacts

To verify service contacts in an existing case using File & Serve *Texas*, follow these steps:

*Select the “Case” if you’d like the Service Contact to be associated in the instant case.

*Select one of the case parties if you’d like the Service Contact to associate/“follow” the party, e.g., if they are involved in other cases.

Who should be notified about this filing?

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

e-Serve	27	Name	Email Address	Attach To	Action
<input checked="" type="checkbox"/>		Jesse Guerrero	JG124578@gfake.com	Not So Funny Business	Detach
<input checked="" type="checkbox"/>		Jesse Guerrero	JG124578@gfake.com	Case	Detach
<input type="checkbox"/>		jesse james	jesse.james@gmail.com	Not So Funny Business	Detach
<input type="checkbox"/>		Kelsey Clark	kclark@gmail.com	Not So Funny Business	Detach
<input type="checkbox"/>		Kelsey Clark	kc124@fake.com	Case	Detach
<input checked="" type="checkbox"/>		Lacy Jones		select	Detach
<input checked="" type="checkbox"/>		Pro Email		select	Detach
<input checked="" type="checkbox"/>		Richard Fine		Case	Detach
				Not So Funny Business	Detach
				Funny Business	Detach

Uncheck the box next to the service contact(s) you DO NOT wish to serve in the instant transaction

When adding a service contact, select either "Case" or a case party (i.e., first-named Plaintiff / Defendant) so they "stick" to the service list.

FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – *Service Contacts*

Preface:

- All Service Contacts in each category presented in the next slides must be “attached” to either “Case” or a case party (e.g., first-named Plaintiff).
- Some of the Service Contacts cannot be changed, particularly for attorneys that were added from the Public List.
- You can only modify (i.e., “Detach” from a case/party or remove with the “trash can” icon) those contacts newly added at the time of the filing – or added by your “own firm” – i.e., a Firm Service Contact.
- You cannot edit opposing counsel in the state of Texas added under the Public List. However, if you added an opposing counsel that is out-of-state under “New Service Contact” and saved them to the service list, they will be added under your “Firm Service Contacts”. You can easily add them in future cases under “Firm Service Contacts”. Or, you can have your Firm Administrator, or the Filer, edit the Firm Service Contact under the “Service Contact” button found in the Firm Admin drop-down menu; or for the Filer, under the “Filing” drop-down menu.
- Please note that both Firm Administrator(s) and Filers can add, edit, or remove a Firm Service Contact.

FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – Service Contacts (continued)

Preface (continued):

To attach to “Case” or a case party, follow the steps below:

Step 1: Click on the drop-down menu next to the Service Contact and select either “Case” or the correct party. The system will automatically “attach” them.

<input checked="" type="checkbox"/>	Tyler Smith	tylersmith@fakelaw.com	select	 
<input checked="" type="checkbox"/>	warda khan	wkhan@fileandserve.com	select	 Detach
<input checked="" type="checkbox"/>	William Airhart	w.airhart@gmail.com	Case	 Detach
			Not So Funny Business	
			Funny Business	



FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – Service Contacts (continued)

Preface (continued):

To attach to “Case” or a case party, follow the steps below :

Step 2: Once the contact has been attached, you will see icons: pencil, trash can; and a “Detach” link under the Action column.

<input checked="" type="checkbox"/>	Tyler Smith	tylersmith@fakelaw.com	Case ▼	  Detach
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FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – Service Contacts (continued)

To add service contacts in an existing case using File & Serve Texas, follow these steps:

Adding a Firm Service Contact:

1. To add a support staff member(s) from your firm, select “**Add Contact from 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.**”

The screenshot shows the 'Add Individually' section of the File & Serve Texas interface. At the top, there is a dropdown menu labeled 'Add Individually' with a red arrow pointing to it. Below this is another dropdown menu labeled 'Add Contact From Firm Service Contacts' with a red arrow pointing to it. Underneath are two input fields: 'First Name' with the value 'Ann' and 'Last Name' with the value 'Rose', both with red arrows pointing to them. Below these is an 'Email Address' input field and a blue 'Search' button with a red arrow pointing to it. At the bottom, there is a table with the following data:

First Name	Last Name	Email Address	Action
Ann	Rose	Arose7153@gmail.com	Add To List

A red arrow points down to the 'Add To List' link in the table.

FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – Service Contacts (continued)

Adding a Contact from the Public List:

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 for adding a contact. At the top, there is a label 'Add Individually' with a red arrow pointing to it. Below it is a dropdown menu with the selected option 'Add Contact From Public List' and a downward arrow. The form is divided into two columns. The left column has a 'First Name' label with a red arrow, followed by a text input field containing 'John'. The right column has a 'Last Name' label with a red arrow, followed by a text input field containing 'Doe'. Below these are two empty text input fields labeled 'Email Address' and 'Firm Name'. At the bottom left of the form is a dark blue button labeled 'Search' with a red arrow pointing to it. Below the form is a table with four columns: 'First Name', 'Last Name', 'Email Address', and 'Action'.

First Name	Last Name	Email Address	Action
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FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – Service Contacts (continued)

Adding a New Service Contact:

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" with a dropdown menu set to "Add New Service Contact". Below the dropdown are five text input fields: "First Name" (containing "Lacy"), "Middle Name" (empty), "Last Name" (containing "Jones"), "Email Address" (containing "lacyjones@fakelawfirm.com"), and "Administrative Copy" (empty). At the bottom are two buttons: "Cancel" (red) and "Save" (dark blue). Red arrows point to the "Add Individually" text, the dropdown menu, the "First Name" field, the "Last Name" field, the "Email Address" field, and the "Save" button.

FILING INTO AN EXISTING CASE: Adding Service Contacts

Step 4 – Service Contacts (continued)

9. They will be added to the instant service list and to the “**Service Contacts**” under your firm.
10. You can easily search for them under “**Add Contact From Firm Service Contacts**” for any future cases.


Add Individually

Add Contact From Firm Service Contacts 

First Name

Last Name





Email



FILING INTO AN EXISTING CASE: Removing Service Contacts

To remove a service contact from the service list in an existing case, follow these steps:

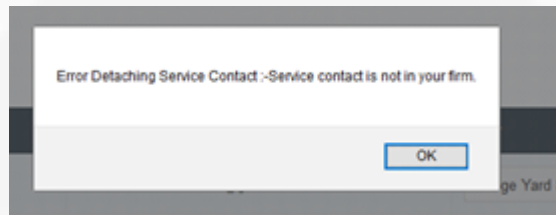
1. Review the service list to make sure it is current and correct.
2. If a service contact is within your firm, i.e., a Firm Service contact, you can perform one of the following action items:
 - a. De-Select (uncheck the box) so the contact will not receive service in that transaction;
 - b. Detach them from the previously selected party and select the correct party;
 - c. Remove them by clicking on the “trash can” icon.

e-Serve	25	Name	Email Address	Attach To	Action
<input checked="" type="checkbox"/>		Richard Fine	rf1234@fake.com	Case ▼	 Detach
<input type="checkbox"/>		Robert Moran	rm@fake.com	Funny Business ▼	 Detach
<input type="checkbox"/>		time go	ttg@fake.com	Case ▼	 Detach
<input checked="" type="checkbox"/>		Tracie Fields	tf@fake.com	Case ▼	 Detach

FILING INTO AN EXISTING CASE: Removing Service Contacts (*continued*)

To remove a service contact from the service list in an existing case, follow these steps:

3. If the service contact is not within your firm, you can perform the following action item:
 - a. De-Select (uncheck the box) so the contact will not receive service in that transaction.
4. An error message will pop-up if you try to remove a service contact that is not a Firm Service Contact.

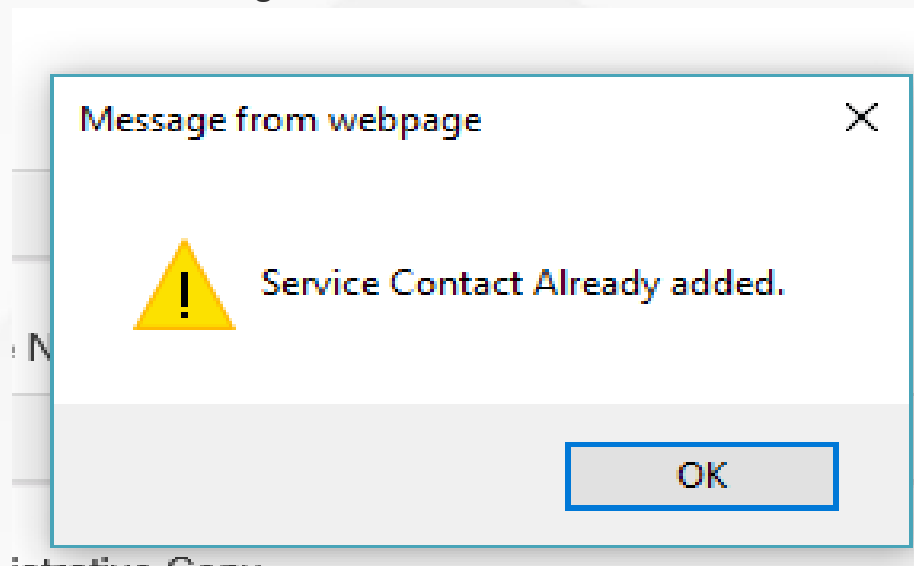


Note: If you have questions, please contact our Client Support department, 1-888-529-7587.

FILING INTO AN EXISTING CASE: Removing Service Contacts (*continued*)

5. If you have accidentally removed a Firm Service Contact that was previously added to the service list as a New Service Contact, search for them under “**Add Contact from Firm Service Contacts.**”

Note: If you have deleted a New Service Contact and try to search and add them again under, “**New Service Contact,**” you will receive this error message below:

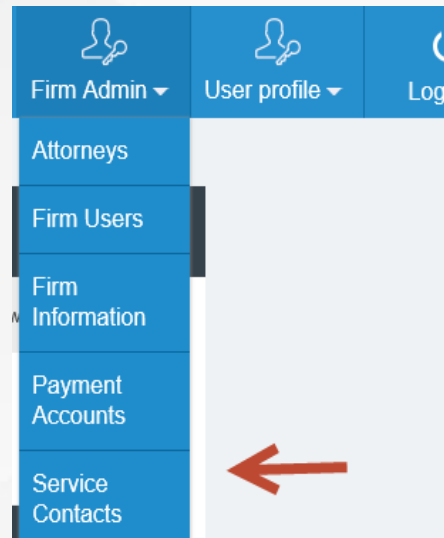


HELPFUL TIPS WITH NEW SERVICE CONTACTS

Both a Firm Administrator and Filer can add, edit, or delete a Firm Service Contact. The edits can be completed prior to a filing or in the middle of a transaction. The steps below are the same for the Filer; *except*, the “Service Contacts” will be housed under the “Filing” drop-down menu.

If you are a Firm Administrator or Filer, please follow the steps below:

Step 1: Select the “Service Contact” button under the Firm Admin drop-down menu; or the Filing drop-down menu.



HELPFUL TIPS WITH NEW SERVICE CONTACTS *(continued)*

If you are a Firm Administrator or Filer, please follow the steps below *(continued)*:

Step 2: Search for the Service Contact. Edit with the “pencil” icon or remove with the “trash can” icon.





Step 3: To add a firm service contact, enter the first name, last name, and email.
Click “**Add New Service Contact**”.

Service Contact

First Name

Last Name

Email Address

First Name	Last Name	Email Address	Action
1	1	1@1.com	 
Firm	11091	integratedcft+firm11091@gmail.com	 

HELPFUL TIPS WITH NEW SERVICE CONTACTS (*continued*)

If you are a Firm Administrator or Filer, please follow the steps below (*continued*):

Step 4: When adding a new Firm Service Contact, you can place the legal assistant and/or paralegal in the “**Administrative Copy**” field. This allows them to receive the “**Notification of Service**” from EFile Texas when their attorney is served in a case.

Create New Contact

First Name: Nancy Middle Name: Last Name: Lane

Email Address: nancylane@fakelaw.com

Administrative Copy: nemken@fileandserve.com,wkhan@fileandserve.c

Emails should be separated by "," no space

Save Cancel

HELPFUL TIPS WITH NEW SERVICE CONTACTS (*continued*)

For the Filer:

- Simply log out of the transaction and make the request to your Firm Administrator or complete the Firm Service Contacts adjustments as outlined in the previous slides.
- Log back into File & Serve *Texas*. You will be taken to the Incomplete Filings page.
- Click on “Complete Filing” under Search Result to finish the transaction and submit to the court.

File & Serve *Texas*™

Incomplete Filings

Search Result

Transaction ID	Jurisdiction	Created on	Created By	Action
101771	Supreme Court	03/28/2017	Mork Bugbash	Complete Filing Delete Filing

File & Serve *Texas*™