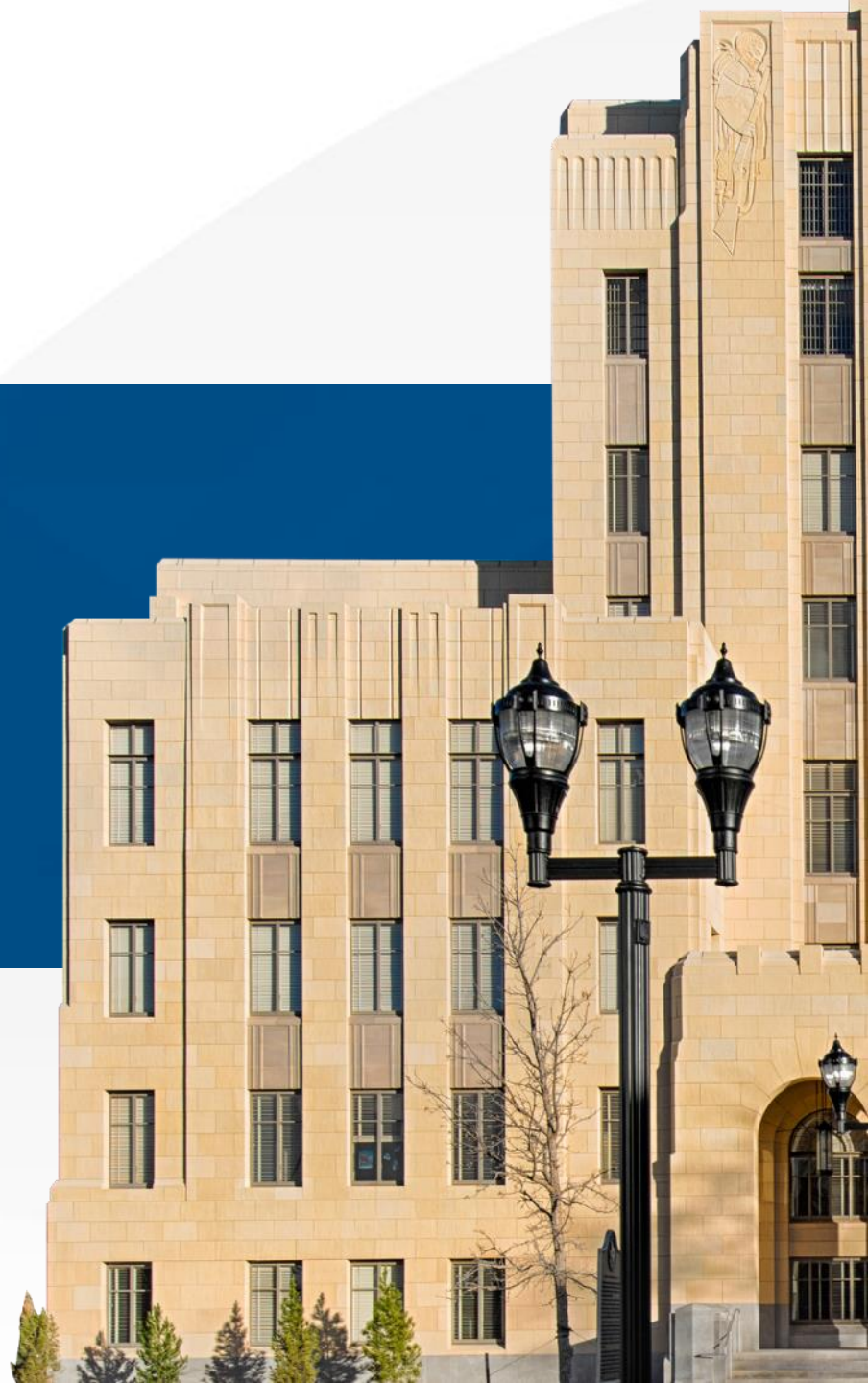


File & Serve *Texas*™

Subsequent Filings



File & Serve *Texas*

SUBSEQUENT FILING

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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.

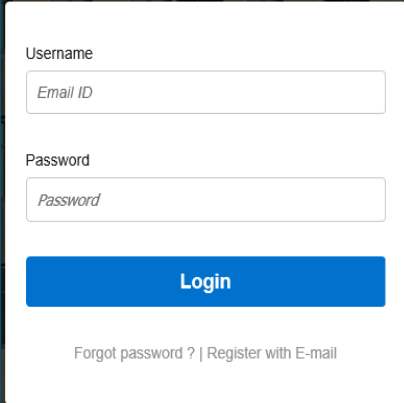
SUBSEQUENT FILING OVERVIEW

The File & Serve *Texas* User Guide provides a convenient source of information to help you efficiently e-File into an existing 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*



Username
Email ID

Password
Password

Login

Forgot password ? | Register with E-mail

1. Open IE, Chrome, or Firefox 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 FASTEST WAY TO FILE

For more information about eFiling in Texas please [click here](#).

System Notifications

[Read more.](#)

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.
- To begin the subsequent filing, you may stay on this page and go to the “**Is this filing for an existing case?**” field. Click on the drop-down menu and select “**Yes.**” Or, go to the Completed Filings page and click on the “+” sign next to a transaction that has been accepted by the clerk. Please see next slides for screen shots.

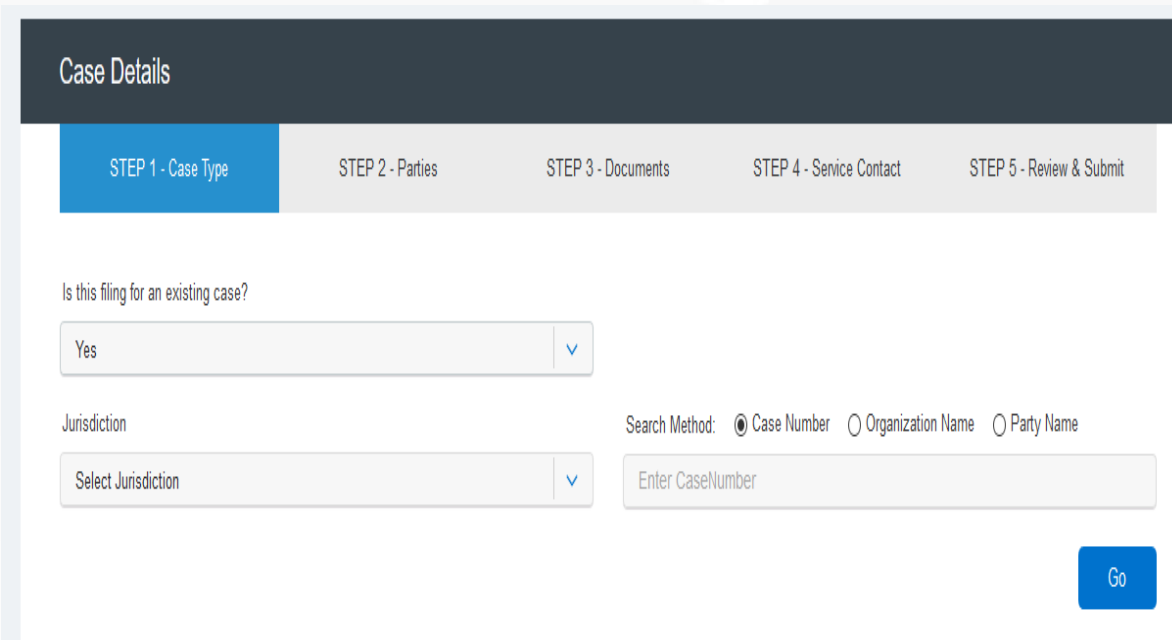
The screenshot shows the 'Case Details' page with a progress bar at the top indicating five steps: STEP 1 - Case Type (active), STEP 2 - Parties, STEP 3 - Documents, STEP 4 - Service Contact, and STEP 5 - Review & Submit. The main form area contains several fields:

- Is this filing for an existing case?**: A dropdown menu with 'No' and 'Yes' options. The 'Yes' option is selected and highlighted. A red arrow points to this option.
- Case Type**: A dropdown menu with 'Select' as the current value.
- Payment Account**: A dropdown menu with 'Select' as the current value.
- Attorney**: A dropdown menu with 'Select' as the current value.
- Client Matter ID**: A text input field.
- Filer Type**: A dropdown menu with 'Select' as the current value.
- Case Category**: A dropdown menu with 'Select' as the current value.

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

GETTING STARTED *(continued)*

5. If you selected “Yes” in “Is this filing for an existing case?” field, you will be taken to a new screen to enter the jurisdiction and your case number, the Organization Name, or the Party Name to search for your case. Please see screen shot below and the next slide for additional screen shots for an Organization Name search, and a Party Name search.



The screenshot shows a web form titled "Case Details" with a dark header. Below the header is a navigation bar with 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 main form area contains the following elements:

- A dropdown menu labeled "Is this filing for an existing case?" with "Yes" selected.
- A dropdown menu labeled "Jurisdiction" with "Select Jurisdiction" as the placeholder.
- A "Search Method" section with three radio buttons: "Case Number" (selected), "Organization Name", and "Party Name".
- A text input field labeled "Enter CaseNumber".
- A blue "Go" button.

Case Number
Search

GETTING STARTED *(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?

Yes



Jurisdiction

Select Jurisdiction



Search Method: Case Number Organization Name Party Name

Enter OrganizationName

Go

Organization Name Search

Party Name Search

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



Jurisdiction

Select Jurisdiction



Search Method: Case Number Organization Name Party Name

First

Middle

Last

Go




GETTING STARTED *(continued)*


- If you selected the “+” icon on the Completed Filings page next to a transaction that has been accepted by the clerk, you will be taken to a new screen.
- Click “**Start Filing**” to begin your filing. Please see next slide for screen shot.

Search Results

Show 25 ▼
filings per page


Search: ✕

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
197584		10-0001	Supreme Court	12/29/2017	integratedcft 627	  



GETTING STARTED *(continued)*

Search Result(s)



Select Case	Case Number	Case Type	Case Category	Case Title
Start Filing	10-0001	Civil	Civil - Other Civil	

***Once your case appears, click on
“Start Filing.”***

FILING INTO AN EXISTING CASE: Step 1- Case Type

To file into an existing case using File & Serve *Texas*, follow these steps:

1. All fields in Step-1 will be auto-populated. Verify the information. You will be able to change the information if necessary by clicking on the drop-down menu of the fields, or typing into the Client Matter ID field.

Note: The **Payment Account** field will be auto-populated to the default payment account chosen by your Firm Administrator. If you do not see that it is auto-populated, please contact 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.

FILING INTO AN EXISTING 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?
Yes

Case Number
10-0001

Jurisdiction
Supreme Court

Filer Type
Not Applicable

Case Category
Civil - Other Civil

Case Type
Civil (\$0)

Payment Account
Mastercard

Attorney
Ron Brown

Client Matter ID
45698

Next

Click on the drop-down menu to find “Waiver”, if needed.

Payment Account

Mastercard

Select

Mastercard

Waiver Account



FILING INTO AN EXISTING CASE: Step 1- *Case Type (continued)*

To file into an existing case using File & Serve *Texas*, follow these steps:

2. 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 INTO AN EXISTING CASE: Step 1- Case Type (continued)

TOGGLING BETWEEN STEPS

3. 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.

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 INTO AN EXISTING 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: <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	Courtesy Copies	Fees
Responsible for Filing Fees : Error: <ul style="list-style-type: none">Please add document to continue.Select Party Responsible for Filing Fees 								

FILING INTO AN EXISTING CASE: Step 2- Parties

To verify and/or create a new party in an existing case using File & Serve *Texas*, follow these steps:

1. The List of Parties (Party Type/Name) will be auto-populated, including the **“Total Case Parties.”**
2. Select the Sending Party for this transaction by checking the appropriate box if it is not already populated.
3. If necessary, create a new party by selecting, **“Create New Parties.”**

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](#) **Create a New Party if necessary**

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 INTO AN EXISTING CASE: Step 2- Parties (continued)

4. If you select, “**Create New Parties,**” a new screen will pop-up.
5. Select “**Party Type**” from the drop-down menu. **Note:** A Party Types with an “*” is required.
6. Select the radio button if the party is a “**Person**” or an “**Organization.**”
7. Select the radio button whether the party is your client or not by selecting “**Yes**” or “**No**”.
8. 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.
9. Click “**Add Party**” to add the party to the List of Parties.
10. Walk through these steps for all remaining parties that need to be added until complete.

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
Select

Phone No.

Clear Add Party

FILING INTO AN EXISTING CASE: Step 2- Parties (continued)

11. Your List of Parties will be displayed at the bottom of the screen, including the “**Total Case Parties**”.
12. Make sure a Sending Party is selected for this transaction by checking the appropriate box.
13. 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 INTO AN EXISTING CASE: Step 3 – Documents

To upload and attach documents to be filed in the existing 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 if it is not already populated.


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 INTO AN EXISTING CASE: Step 3 – Documents (continued)

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

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

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
Not So Funny Business

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 INTO AN EXISTING CASE: Step 3 – Documents (continued)

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

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.**” If you’d like a “**Serve**”-only transaction, click on the drop-down menu and select “**Serve**”.

File & Serve Transaction (Default)

Filing Type: File and Serve

Filing code: Select

Filing Description (Maximum 200 characters)

File Only Transaction

Filing Type: File

File

File and Serve

Serve

Filing Type: Serve

Serve

File

File and Serve

Serve

Serve Only Transaction

FILING INTO AN EXISTING CASE: Step 3 – Documents (continued)

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

4. Select the Filing Code.
5. Enter the Filing Description. This is the document, or set of documents, you are e-filing/e-serving. Note the character limit of 200.
6. Click on “**Browse**” to upload the Lead Document. Note the character limit for the file name is 50 characters. This includes, e.g., “.pdf”.
7. Select the Document Category.
8. Note the envelope size limit of 35MB.

The screenshot shows the filing interface with the following elements:

- Filing Type:** A dropdown menu with "File and Serve" selected.
- Filing code:** A dropdown menu with "Select" selected. The label "Filing code" is highlighted in yellow.
- Filing Description:** A text input field with the label "Filing Description (Maximum 200 characters)". A red arrow points to this field.
- Lead Document:** A text input field with the label "Lead Document (35MB - Maximum 50 characters)". A red arrow points to this field. A "Browse..." button is located to the right of the input field.
- Document Category:** A dropdown menu with "Select" selected. A red arrow points to this field.

FILING INTO AN EXISTING CASE: Step 3 – Documents (continued)

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

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

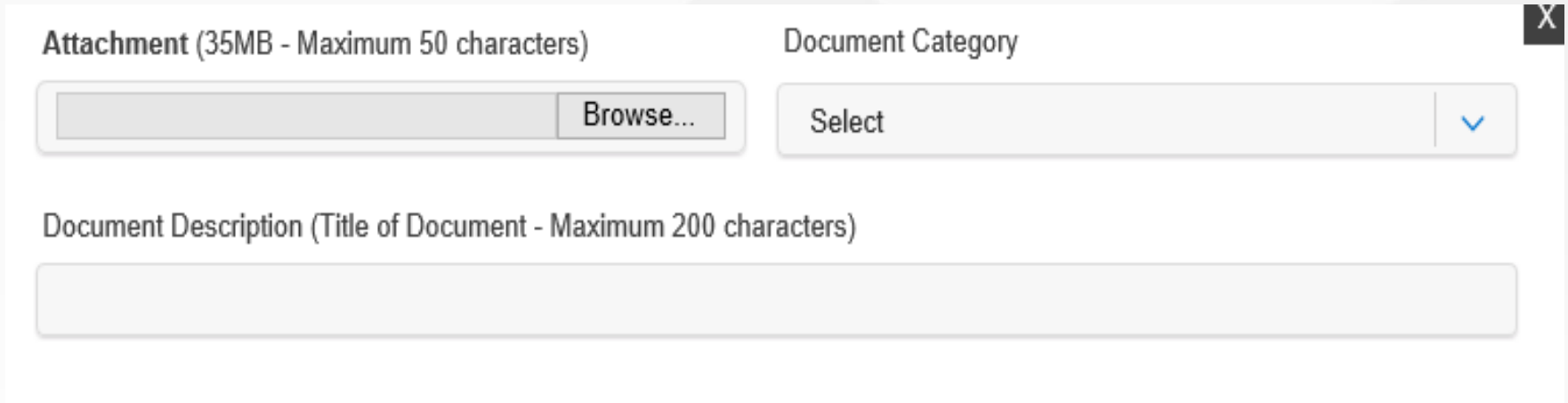
The screenshot displays a web form for filing documents. At the top, there are two dropdown menus: 'Filing Type' set to 'File and Serve' and 'Filing code' set to 'Petition (\$ 262.00)'. Below these is a text field for 'Filing Description (Maximum 200 characters)' containing 'Petition and Declaration in Support'. A dashed box highlights the 'Lead Document' section, which includes a 'Document Category' dropdown set to 'New Case Filings', a file selection area with a 'Browse...' button and 'No file selected.' text, and a 'Document Description (Title of Document - Maximum 200 characters)' field containing 'Petition for John Doe v. Doe Corp'. A red arrow points to a green '+ Add More Attachment(s)' link at the bottom right of the dashed box.

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

FILING INTO AN EXISTING 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. Click, “**Browse**” to upload the attachment.
12. Make sure to select the Document Category.
13. Enter the Document Description. Note the character limit of 200.



The screenshot shows a form for uploading a document. It is divided into three main sections. The first section is for the attachment, with a label 'Attachment (35MB - Maximum 50 characters)'. It contains a text input field and a 'Browse...' button. The second section is for the document category, with a label 'Document Category'. It contains a dropdown menu with the word 'Select' and a blue downward arrow. The third section is for the document description, with a label 'Document Description (Title of Document - Maximum 200 characters)'. It contains a large text input field. In the top right corner of the form, there is a small black square with a white 'X' icon.

FILING INTO AN EXISTING CASE: Step 3 – Documents (continued)

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

- 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

- Next, enter a Note to Clerk. This is your “**direct**” communication with the court clerk.
- 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 INTO AN EXISTING CASE: Step 3 – Documents (continued)

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

17. The filer has the option to enter an email address(es) of their legal team member(s) to ensure an “Accepted Notification” is delivered to them. **Note:** All notifications come from the eFiling manager, EFile Texas. The filer will receive all notifications: Submitted, Accepted, Returned for Correction, and/or Rejected.

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

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.)

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

FILING INTO AN EXISTING CASE: Step 3 – Documents (continued)

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

18. You can begin to upload additional Lead Documents and Attachments, if necessary. Simply click on “**Add Document**” and follow the same steps.
19. Click “**Next**” to move to Step 4-Service Contact or on the tab, “**Step 4-Service Contact**”.

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 INTO AN EXISTING CASE: Service Contacts

Step 4 – *Service Contacts*

The next few slides will explain how to add a service contact(s) to an existing service list. Please note the following in all of the selections in an existing case using File & Serve *Texas*, follow these steps:

- The service list will be auto-populated.
- You will be able to view the number of contacts on the service list next to the “**e-Serve**” column.
- You can keep the boxes checked under “**e-Serve**” for those contacts you would like to serve in this transaction.
- You can de-select the boxes under “**e-Serve**” for those contacts you would like to NOT serve in this transaction.
- 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: Service Contacts

Step 4 – Service Contacts

*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	com	Case	Detach
<input type="checkbox"/>		jesse james	m	Not So Funny Business	Detach
<input type="checkbox"/>		Kelsey Clark	gmail.com	Not So Funny Business	Detach
<input type="checkbox"/>		Kelsey Clark	kc124@fake.com	Case	Detach
<input checked="" type="checkbox"/>		Lacy Jones		select	
<input checked="" type="checkbox"/>		Pro Email		select	Detach
<input checked="" type="checkbox"/>		Richard Fine		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: Step 4 – *Service Contacts*

To create service contacts in an existing 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.**”


The screenshot shows the 'Add Individually' section of the File & Serve Texas interface. It includes a dropdown menu for 'Add Contact From Firm Service Contacts', input fields for 'First Name' (containing 'Ann') and 'Last Name' (containing 'Rose'), and an empty 'Email Address' field. A blue 'Search' button is located below the input fields. Below the form is a table with the following data:


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

FILING INTO AN EXISTING 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.**”

Add Individually 

Add Contact From Public List 

First Name 

John

Last Name 

Doe

Email Address

Firm Name

Search 

First Name	Last Name	Email Address	Action
------------	-----------	---------------	--------

FILING INTO AN EXISTING 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" with a dropdown menu set to "Add New Service Contact". Below the dropdown are four input fields: "First Name" (containing "Lacy"), "Middle Name" (empty), "Last Name" (containing "Jones"), and "Email Address" (containing "lacyjones@fakelawfirm.com"). There is also an "Administrative Copy" checkbox which is unchecked. At the bottom are two buttons: "Cancel" (red) and "Save" (dark blue). Red arrows point to the dropdown menu, the "First Name" field, the "Last Name" field, the "Email Address" field, and the "Save" button.


FILING INTO AN EXISTING 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 Address	Action
<input checked="" type="checkbox"/>		Ann Rose	Arose7153@gmail.com	 
<input checked="" type="checkbox"/>		Lacy Jones	lacyjones@fakelawfirm.com	 



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

FILING INTO AN EXISTING 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 INTO AN EXISTING 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**

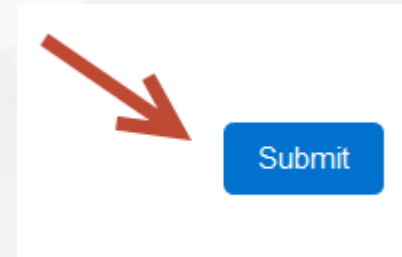
Case Number : 10-0001

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	



FILING INTO AN EXISTING 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:

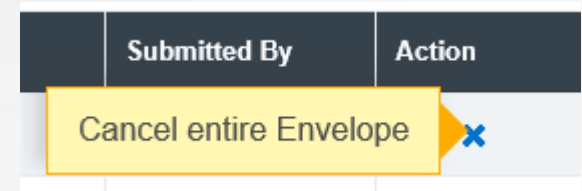
[Go](#) [Clear All](#)

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 INTO AN EXISTING CASE: Step 5 – Review & Submit (continued)

13. In an existing case, you will see a “+” icon next to the transaction. You can click on the “+” sign going forward to e-file/e-serve into the existing case.
14. You will always be able to review the Transaction Summary via the “eyeball” icon next to the transaction.
15. 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.**

Search Results

Show filings per page

Search: ×



Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
197584		10-0001	Supreme Court	12/29/2017	integratedcft 627	  

LOCATING YOUR FILE-STAMPED DOCUMENT

Step In File & Serve Texas

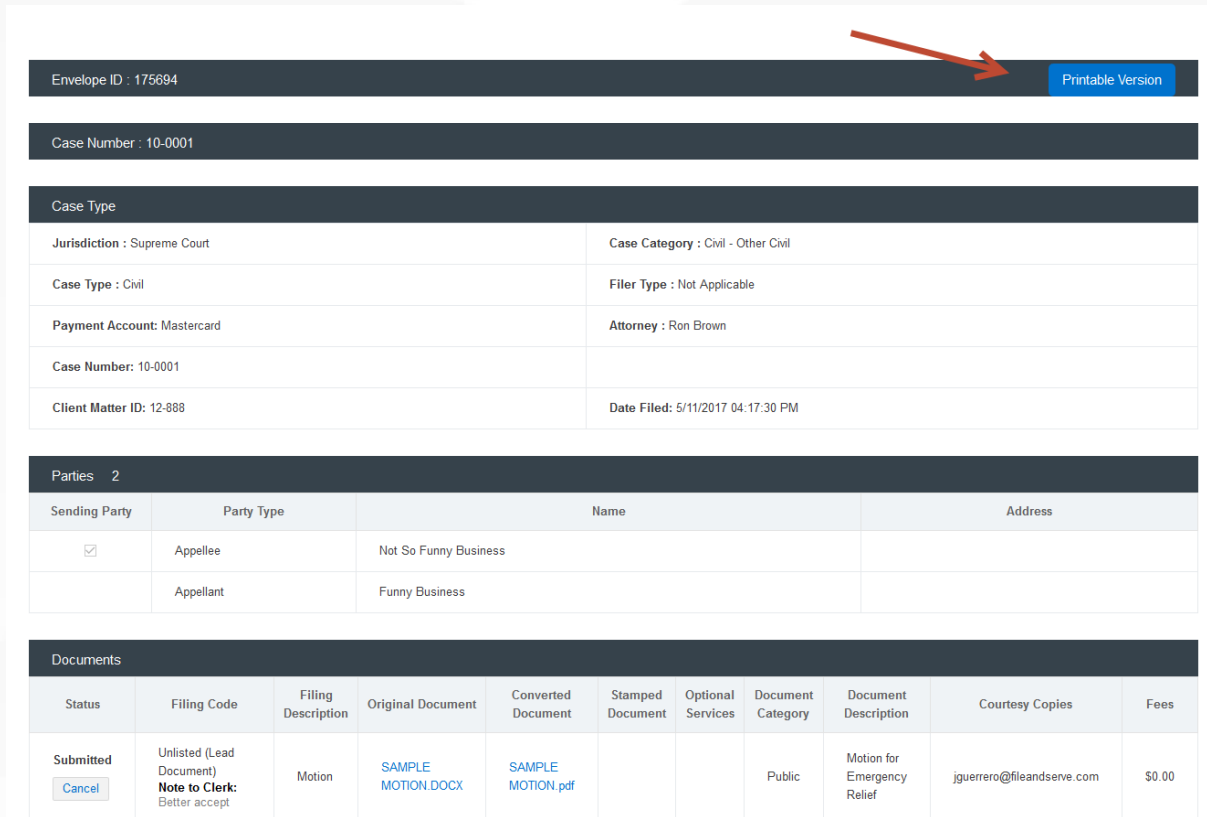
Once you receive the Accepted notification from Efile Texas, you will be able to view your file-stamped document within File & Serve Texas. Please follow these steps using File & Serve Texas to locate:

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”**.



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
<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). Once the service contact clicks on the document link from the Notification of Service email from the eFiling Manager, EFile Texas; the “unopened” will change to the date and time the link was “clicked”.

Service Contact 1						
e-Serve	Name	Email Address	Public	Attached To	Status	Date Opened
Yes	Amber Rose	Arose7153@gmail.com	No	Jane Brown	Sent	Unopened



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 displays the 'Completed Filings' interface. At the top right, there is a '+ New Filing' button. The main area contains several filter sections: 'Search' (with a 'Select' dropdown), 'Jurisdiction' (with a 'Select' dropdown), 'From Date (mm/dd/yyyy)' and 'To Date (mm/dd/yyyy)' (text input fields), 'Sort By' (a dropdown menu with 'My Filings' selected and 'My Firm's Filings' highlighted, with a red arrow pointing to it), 'Filing Type' (with a 'Select' dropdown), 'Filing Code' (with a 'Select' dropdown), 'Case Number' (text input field), and 'Envelope ID' (text input field). Below these filters are 'Filing Status' (with a 'Select' dropdown) and two buttons: 'Go' (blue) and 'Clear All' (red). At the bottom left, there is a 'Search Results' section with a 'Show' dropdown set to '25 filings per page'. At the bottom right, there is 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 enter their name under the “Search” field.
- You can also click on any column header to put into ascending or descending order.

Search Results

Show

25

filings per page

Click on any column header to put the information to ascending or descending order.

Search:



Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
197584		10-0001	Supreme Court	12/29/2017	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.

Search Results

Show

25

filings per page

Search: 197784

Envelope ID	Case Name	Case Number	Jurisdiction	Date Filed	Submitted By	Action
197784		10-0001	Supreme Court	01/05/2018	integratedcft 1212d	  

Showing page 1 of 1 (filtered from 44 filings)

Previous Next

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

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 populated. 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 Number
FAS - 1110A

Jurisdiction
Bexar County - District Clerk

Filer Type
Select


Case Category
Civil - Injury or Damage

Case Type
Malpractice - Accounting (\$287.00)

Payment Account
Mastercard

Attorney
Ron Brown

Client Matter ID
1110-2

 [Next](#)

REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS (continued)

The screenshot shows the 'Case Details' page for 'Step 2 - Parties'. At the top, there is a navigation bar with 'File & Serve Texas' logo, a 'Login to File & ServeXpress' button, and dropdown menus for 'Filing', 'Firm Admin', 'User profile', and 'Log Out'. Below the navigation bar, a progress indicator shows five steps: 'STEP 1 - Case Type', 'STEP 2 - Parties' (highlighted), 'STEP 3 - Documents', 'STEP 4 - Service Contact', and 'STEP 5 - Review & Submit'. The main content area is titled 'Who are the parties?' and includes a 'Create New Parties' button, a 'Party Name' input field with a 'Go' button, and a 'List of Parties' section. The 'List of Parties' section shows 'Total Case Parties: 2' and a table with columns for 'Sending Party', 'Party Type', 'Name', and 'Actions'. The table contains two rows: one for 'Defendant Joe' with a checked 'Sending Party' checkbox, and one for 'Plaintiff Tester' with an unchecked checkbox. Each row has edit and delete icons in the 'Actions' column. At the bottom of the page, there is a 'Back' button and a 'Next' button. A copyright notice '© 2017 File & Serve Texas™ All Rights Reserved' is visible at the very bottom.

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).

The screenshot shows the 'Case Details' page for 'Step 3 - Documents'. The progress indicator at the top shows 'STEP 3 - Documents' highlighted. The main content area is titled 'What documents are you filing?' and contains a table with columns for 'Filing Code', 'Filing Type', 'Description', and 'Actions'. The table has one row: 'Transfer (County Use Only)' with 'File and Serve' as the filing type and 'FAS Reject' as the description. In the 'Actions' column for this row, there is a pencil icon (highlighted with a red arrow) and a trash icon.



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 ▼

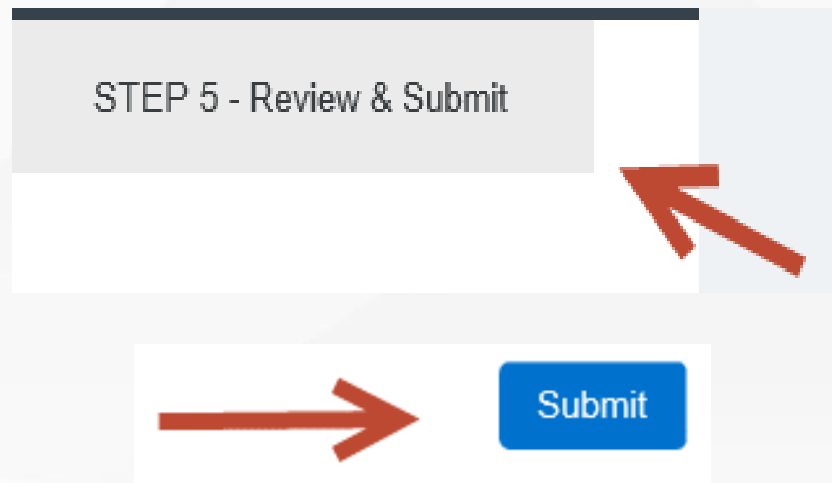
Send Accepted Notifications To: (Optional Field. Add email address for each recipient you want to receive accepted notifications.)

nemken@fileandserve.com, wkhan@fileandserve.com 

(Maximum character limit is 160 characters.)

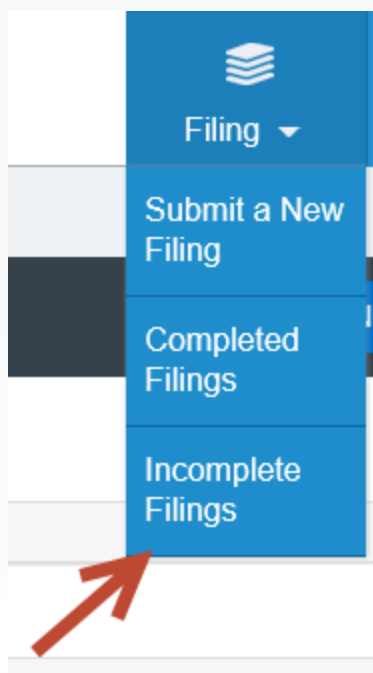
REJECTED OR RETURN FOR CORRECTION NOTIFICATIONS *(continued)*

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

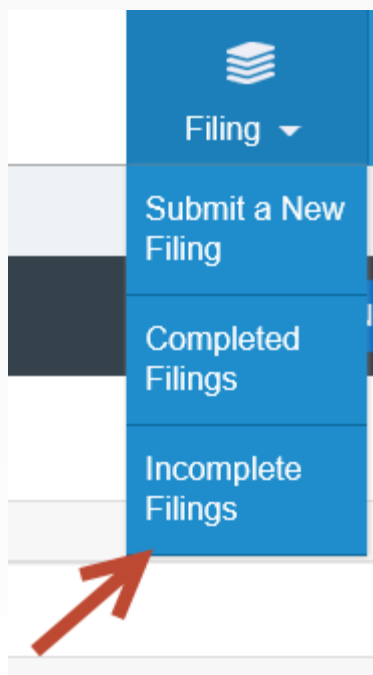
1. If needed, you can log out of File & Serve *Texas* in the middle of a transaction and finish the transaction at a later date.
2. To complete the filing, please log back into File & Serve *Texas*. Go under the “**Filing**” drop-down menu and select “**Incomplete Filings**”.
3. Under “**Search Results**,” 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.

A screenshot of the 'Incomplete Filings' page. At the top right is a '+ New Filing' button. Below are filters for 'Sort By' (set to 'My Filings'), 'Jurisdiction' (set to 'Select'), 'From Date', and 'To Date'. A 'Go' button is on the right. Below the filters is a 'Search Results' section with a 'Show 25 filings per page' dropdown and a search input field. A table with two rows of data is shown. A red arrow points to the 'Complete Filing | Delete Filing' link in the 'Action' column of the first 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.
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 dark header with the title and a '+ New Filing' button. Below the header, there are search filters: 'Sort By' (with a dropdown menu showing 'My Filings' and 'My Firm's Filings', and a red arrow pointing to the dropdown), 'Jurisdiction' (with a 'Select' dropdown), and 'To Date (mm/dd/yyyy)' (with an empty input field). A 'Go' button is located at the bottom right.

Search Results

Show 25 filings per page

Search:

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

PROVISIONAL FILING

1. If your case is not found, you will receive the message below.
2. Click **“Proceed”** to manually enter the case information and go through the 5-step process to complete your filing.

Search Result(s)

If your case is not listed above, you are attempting to efile into a case that has yet to receive an electronic submission within efiletexas.gov and the case is not searchable from the court's case management system.

You are still able to file into the case, but you will first be required to manually input case information. Any additional filings on this case will not require the manual data entry.

Proceed

