File & Serve – Tips for Set Up and eService

1. When you set up your account, **register as a Firm Administrator, even if you are a sole practitioner**. Only the Firm Administrator option gives you access to all the settings you need.

NOTE: In File & Serve, the "firm administrator" is someone with access to set up and manage your firm's account, including payment accounts. It's not necessarily the same person who holds the firm admin position within your organization.

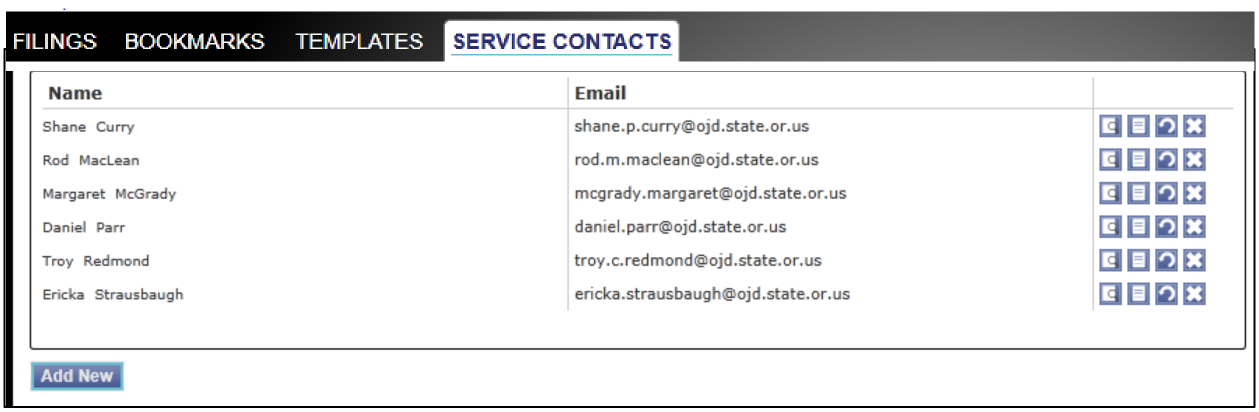
IMPORTANT NOTE ABOUT SERVICE CONTACTS IN FILE & SERVE:

The term "Service Contacts" in File & Serve refers to the individuals <u>within your firm</u> who will <u>receive</u> service from opposing counsel.

NEVER enter service contact information for anyone outside of your firm in the File & Serve system.

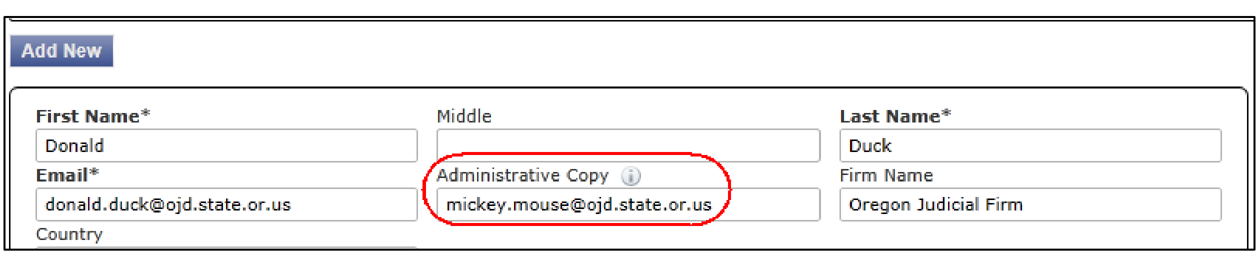
- This is the opposite of how we traditionally think about service. We normally think about serving the other side, but in File & Serve, you only enter <u>your own</u> service contact information.
- Once you enter your service contacts on a case, the other side will be able to serve you electronically through File & Serve.
- If the other side has not yet entered their service contacts on the case, you will need to serve them conventionally.

2. We recommend having one person set up all service contacts in your firm's Master Service Contact list (pictured below). The Master Service Contact list makes it faster and easier to add your firm's service contacts on individual cases.



**Only add attorneys and staff <u>from your firm</u> in this list.

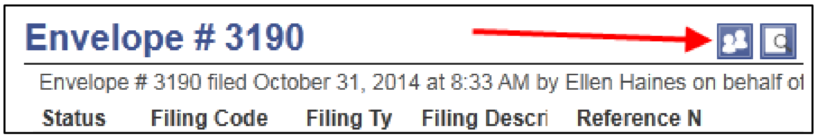
Each person added to the Master Service contact list can have one additional email address entered to receive **Administrative copies** from <u>all cases</u> where that person is added as a service contact:



3. Add all attorneys (and other staff, as needed) to the Master service contact list. The specific service contacts for each case will need to be added on a case by case basis. Again, only add service contacts from your firm on each case.

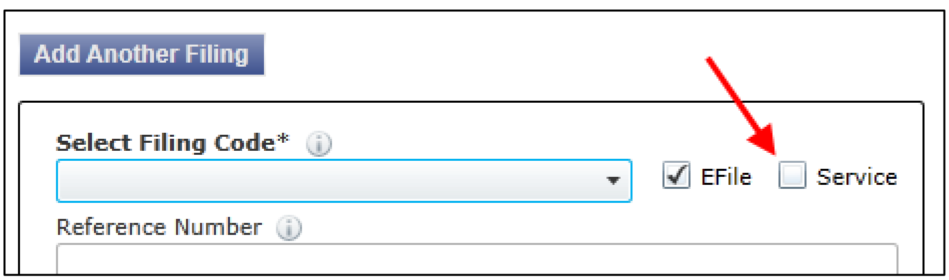
4. Adding service contacts on a case:

- **NEW CASE**
  - Service contacts can't be added when eFiling a NEW CASE. Parties must be served conventionally.
  - After submitting a new case filing, return to the Filings tab. Find the envelope you just submitted and click on the button that looks like two people, over to the left of the envelope #.



  - In the pop-up window, click on Add From Master List to select names from your master list.
  - Click Add New if the contact you are adding is not in your master list.
  - Only add contacts from your firm. Never add service contacts for the opposing side.
  - Do not add judge or court staff email addresses in File and Serve.

- **Existing case**
  - Search by case number, then click the file folder button to start your filing.
  - Add new parties or attorneys if needed. Do not modify existing parties/attorneys in File & Serve.
  - On the Filings screen, check the Service box to the left of the Filing Code drop down:



  - Complete all fields on the Filings screen, then move to the Service Contacts screen.
  - Add from Master List or Add New to add contacts from your firm. Do NOT add the other side.
  - Parties on the opposing side need to add themselves in File & Serve in order for you to eServe them.
  - If you see opposing parties listed in this screen, with email addresses, that means you can eServe them.
  - Check the boxes for all parties listed with email addresses to serve them electronically.

  ***NOTE** – UTCR 21.070(3) has a complete list of documents that require conventional service.

Advanced User Tip: If you would like to set yourself up to receive eService on a case, but you don't have anything to file on the case, you can start a draft filing that will never be submitted. Walk through the steps above, all the way through adding your service contacts for your side, then return to the Parties screen and Exit the filing. The draft envelope will be there in your Filings screen, and you can use the blue X button on the left to delete that draft. Your service contact information will remain on the case after you delete the draft filing.