

File & Serve *Xpress*[™]

E-FILING & E-SERVICE

San Francisco Superior Court

Welcome Kit

CLIENT SUPPORT: 888.529.7587

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I. Mandate Overview

The San Francisco Superior Court has mandated its eFiling expansion effective **December 8, 2014**. On December 8, 2014 eFiling and eService will be mandatory in all General Civil case types except Limited Unlawful Detainer and Small Claims cases.

You will be able to continue to eFile and eServe through File & ServeXpress as we are the Court's selected electronic filing portal. This expanded mandate does not impact the Court's Asbestos, Complex or Probate Trust Cases as File & ServeXpress is already the eFiling host of those cases.

File & ServeXpress has been **the Court's eFiling and eService provider for over 15 years**. File & ServeXpress offers the only all-in-one solution for eFiling and eService in the nation, going beyond the initial eFiling transaction to support the lifespan of your case. The all-in-one solution provides a central command for your law firm with built-in tools to manage the life of your electronic cases. We look forward to supporting and working with your firm.

Mandatory Case Types Available Through File & ServeXpress:

- A. Asbestos
- B. Complex
- C. Probate/Trust
- D. General Civil Cases (except Limited Unlawful Detainer and Small Claims cases)

File & ServeXpress has the experience, capability, and support infrastructure needed to assist the Court with a mandatory eFiling program. We have implemented our eFiling platform in **300 jurisdictions in 36 states**, with 13 of these states plus the District of Columbia having mandatory eFiling cases. In total, we manage **more than 190,000 users** and **more than 42 million document exchanges per year**.

II. The Court's Mandate Announcement

On November 6, 2014, the Superior Court of San Francisco announced its intent to mandate eFiling and eService in General Civil cases (except Limited Unlawful Detainer and Small Claims cases). Below is copy of the Court's announcement.

[To view a copy of the Court's announcement click here.](#)

III. How To Register to eFile & eServe with File & ServeXpress

Your firm's designated account administrator should complete the File & ServeXpress registration process outlined below prior to December 8, 2014.

The Why is this deadline important? Beginning December 8th, law firms will begin eFiling and eServing documents via File & ServeXpress. A delay in registering your firm could cause a delay in your firm's ability to access time-sensitive case documents.

Why do I need to designate an account administrator? We recommend that you designate one or more staff person as an account administrator to manage the process of getting your firm's users registered, trained and familiarized with the Court's rules for eFiling and eService. Your account administrator should also verify the service list information for your firm's cases and add additional attorneys from your firm to the service lists as needed prior to December 8th. The cases are already available. A delay in verifying your firm's service lists could prevent other firms from eServing attorneys at your firm with time-sensitive case documents. Please see the Service List Verification Process within this kit for more information.

Getting Started With Registration

→ **If your firm does not have a File & ServeXpress account**, you will need to create an account before adding users. Your firm must designate an administrator who will create the account and add the users. The administrator should follow the "Instructions for New Subscribers" in Section A below.

→ **If your firm already has a File & ServeXpress account**, contact your account administrator to obtain a user ID and password for yourself and anyone else who will need to eFile, eServe, receive eService or access documents in the cases. The administrator should follow the "Instructions for Existing Subscribers" in Section B below.

→ If I am a self-represented filer, how should I register?

Self-represented filers must create an account and then add themselves as a user on that account. Self-represented filers should follow the “Instructions for Self-Represented Filers” in Section C below.

→ If you don’t know whether your firm has a File & ServeXpress account, or if you don’t know the name of your account administrator, please call Client Support at 888.529.7587.

Section A: Instructions for New Subscribers

(Administrator creates account and adds users)

1. Go to <http://www.fileandservexpress.com> and click the **Register** button.
2. Under File & Serve Registration, click Law Firms even if you are a Self-Represented Individual or Organization.
3. For Account Type, select Law Firm and click Get Started.
4. Add your firm’s information and click Next.
5. Click “Add People” and add the user information for your firm’s account administrator. Check the box next to Primary Contact. If applicable, check the box next to Billing Contact as well. (The Billing Contact will be sent your firm’s monthly invoice.) Click Submit.
6. Add the user information for every attorney and staff member in your firm who will need a user ID and password. Include full name, phone, fax, email and bar number (for attorneys). It is recommended that an ID and password be issued to all attorneys of record.
7. Review system requirements and click Next.
8. Select an Authorized Representative from your firm (if it is not yourself) who has given you permission to accept the terms of the File & ServeXpress Agreement on his/her behalf. Click “I Accept”.
9. An automated e-mail with ID and password information will be sent to each user who you have added to your firm’s account.

Section B: Instructions for Existing Subscribers

(Administrator adds new users)

1. Go to <http://www.fileandservexpress.com> and click on the **Log In** button.
2. Click File & Serve. Enter your ID and password. Click Sign In.
3. Click on File & ServeXpress Preferences in the upper-right hand corner of the screen.
4. Under My Organization Profile, click Add User.
5. Click “Add People” and add the user information for every attorney and staff member in your firm who will need a user ID and password. Include full name, phone, fax, email and bar number (for attorneys). It is recommended that an ID and password be issued to all attorneys of record.
6. An automated e-mail with ID and password information will be sent to each user you have added to your firm’s account.

Section C: Instructions for Self-Represented Filers

(Create an account and add yourself as a user)

1. Go to <http://www.fileandservexpress.com> and click the **Register** button.
2. Under File & Serve Registration, click Law Firms even if you are a Self-Represented Individual or Organization.
3. For Account Type, select Law Firm and click Get Started.
4. Add your information and click Next.
5. Click “Add People” and add the user information for your firm’s account administrator. Check the box next to Primary Contact. If applicable, check the box next to Billing Contact as well. (The Billing Contact will be sent your firm’s monthly invoice.) Click Submit.
6. Click “Add People” and add the user information for yourself and anyone in your organization who will need a user ID and password. Include full name, phone, fax, email and enter “SFProPer” for your bar number. It is recommended that an ID and password be issued to all users in your organization.
7. Review system requirements and click Next.
8. Select an Authorized Representative from your organization (if it is not yourself) who has given you permission to accept the terms of the File & ServeXpress Agreement on his/her behalf. Click “I Accept”.
9. An automated e-mail with ID and password information will be sent to each user who you have added to your account.

IV. Service List Verification Process

The service lists for each civil case on File & ServeXpress will contain the party, law firm and attorney information provided by the San Francisco Superior Court prior to the eFiling and eService mandate date. In most cases, the Court's information will only include the lead attorney at each firm on the service list of a case, therefore, it's important that you take the steps outlined below to ensure that all appropriate staff in your firm receive case notifications.

**** IMPORTANT ****

We strongly encourage your account administrator to verify the service list information prior to December 8th for all of your firm's civil cases where eFiling and eService will be permitted and to add additional attorneys from your firm to the service lists as needed by following these 3 steps:

STEP 1: Your account administrator should send an email to the File & ServeXpress Data Integrity team at dataintegrity@fileandserve.com with the subject line of "San Fran Civil Cases – Request for Service Lists" and the name of your firm in the body of the e-mail.

STEP 2: In return, your account administrator will receive a spreadsheet containing the information about the civil cases where eFiling and eService will be mandated and your firm has an attorney of record on the case according the Court's information.

STEP 3: Your account administrator can then update the spreadsheet, adding or removing attorneys from your firm on each case as needed, and return the spreadsheet to the File & ServeXpress Data Integrity team. Otherwise, your account administrator can check your firm's cases on File & ServeXpress to add or remove attorneys from your firm on each case as needed.

Please note that a delay in verifying the service list information for your firm's cases could prevent other firms from eServing attorneys at your firm with time-sensitive case documents.

V. Training & Helpful Resources

Please visit our [San Francisco Website](#) for a full catalog of online webinars, on-demand videos and downloadable guides and tip sheets to help you along the way.

[Live Webinars](#) →

Register for one of our free, live webinars and get the training you need from the comfort of your desk.



[On-Demand Webcasts](#) →

No time to attend a Live Webinar? Now worries, watch a replay on-demand with our Webcast Series.



[How-To Videos](#) →

Our how-to video series walks you through a typical eFiling journey and gets you on the path to success. Each video offers a step-by-step demo of how to eFile and eServe.



[Helpful Guides & Tip Sheets](#) →

We publish a wide range of materials to help ensure your eFiling success. These documents include tip sheets, implementation guides, best practices and more.



VI. Pricing

Effective Date: 12/08/14

PRICING CALIFORNIA - SUPERIOR COURT OF SAN FRANCISCO (General Civil)	
Unless noted specifically below, all fees are subject to current list prices as reflected in the eFile Pricing and Optional Services pricing sheet posted online under the File & ServeXpress Resource Center.	
FILING DOCUMENTS WITH THE COURT	
Filing into a single case	\$7.00 per transaction
SERVICE TO CASE PARTIES	
Online delivery*	\$8.00 per transaction <i>See Optional Services pricing sheet for offline service fees and other pricing.</i>
DELIVERY OF DOCUMENTS TO ADDITIONAL RECIPIENTS	
Online delivery*	No charge when combined with online service—otherwise: \$8.00 per transaction—unlimited number of online recipients
Email delivery**	No charge when combined with online service—otherwise: \$8.00 per transaction—unlimited number of email recipients

*To File & ServeXpress Advanced users

**To File & ServeXpress non-subscribers

See Optional Service pricing sheet for additional pricing information for optional features and services

VII. Frequently Asked Questions

Efiling & EService Overview

Q. What is eFiling?

A. Efilting is the electronic transmission of your document from your desktop to the Court's case and document management system. A simple user interface directs you through the process and provides you with a record of the transaction. You'll be notified when the Court accepts your filing. Your document is added to an online docket, which remains available to you, your firm and the other firms in your case. The online docket builds a case history of the eFiled documents, which can be accessed from anywhere that you have Internet access.

Q. What is eService?

A. EService is the electronic transmission of your document from your desktop to the online accounts of the parties on the service list in your case. A simple user interface directs you through the process and provides you with a record of the transaction. You can use eService in conjunction with your eFiling transaction – conveniently serving your eFiled document on the other parties in your case in a single transaction – or you can eServe some or all of the other parties in your case with documents not being filed with the Court, such as correspondence and discovery. EServed documents become part of the online docket and are accessible to the parties on which they were served.

Superior Court of San Francisco Efiling & EService Mandate

Q. Why is the Court mandating eFiling & eService in almost all Civil Case Types?

A. The Court implemented an Electronic Information Management project to bring court-wide efficiencies to reduce paper storage and handling, accept electronic documents to eliminate scanning into the Court's case management system and leverage staff resources more effectively.

Q. When does mandatory eFiling & eService begin in the Superior Court of San Francisco?

A. Mandatory eFiling & eService begins on Monday, December 8, 2014 in all General Civil

case types except Limited Unlawful Detainer and Small Claims cases. Asbestos, Complex and Probate cases are also mandatory for eFiling and eService within the San Francisco Superior Court. All of the mandatory case types are already live and available for eFiling & eServing through File & ServeXpress. In fact, these case types have been available for voluntary eFiling & eServing for several months and if you have been eFiling into these cases through File & ServeXpress you do not need to change anything.

Q. Are all of my documents to be filed electronically?

A. Most of your documents will be filed electronically. Original filings in all General Civil case types and all documents in Family Law, Small Claims, and Limited Unlawful Detainer cases must still be submitted at the court in paper. In addition, documents to be issued by the court clerk (summons, writs, abstracts), Bonds, Fee waiver applications (initial & additional), Applications for orders of examination, sealed documents and all documents in sealed & restricted cases must be submitted in paper.

Q. Am I required to eServe my documents?

A. If you eFile a document with the Superior Court of San Francisco, you are required to eServe that document to the other parties in your case. However, Self-Represented Individuals and Self-Represented Organizations must be served with paper copies. You also have the option to eServe documents that are not eFiled, such as correspondence, discovery, etc.

Q. How will I receive the file-stamped copy of my eFiled documents?

A. Once your filing is accepted, the Court will post a PDF of the file-stamped copy on the Court's website and you'll be able to download a copy. [Click here to begin your search.](#)

Q. How do I know if my case is eligible for eFiling with the Superior Court of San Francisco?

A. Most case types in the Superior Court of San Francisco are eligible for eFiling. [Click here to view the list of available case types.](#) If the Court's identifies your case as one of these case types, your case is eligible for eFiling.

Q. How Do I Register to eFile & eServe with the Superior Court of San Francisco?

A. Your firm will need to set up a File & ServeXpress account and add your individual attorneys and staff to your account. If you are a self-represented or pro per party, select "law firm" and then choose Self Represented Individual or Self Represented Organization.

You will not be charged any one-time or recurring fees for setting up your accounts. [Click here to Register.](#)

Q. Once registered, how do I make changes to my File & ServeXpress account?

A. After you register and log into your account for the first time, you may designate one or more individuals as account administrators. An account administrator can add or delete users, set permissions and make any necessary updates. [Click here to see the Account Administrator User Guide.](#)

Q. How do I get my case online?

A. Originating case documents such as complaints and petitions must be paper filed with the court. The court sends File & ServeXpress daily updates of new cases and their service lists. Once the originating documents have been paper filed a case is generally available for subsequent eFilings within 24 business hours.

Q. How do I eFile and eServe with the Superior Court of San Francisco through File & ServeXpress?

A. Please visit our [Training & Resources page](#) within this microsite for a full catalog of online webinars, on-demand videos and downloadable guides and tip sheets to help you along the way.

File & ServeXpress also offers 24/7 Phone Customer Support at 888-529-7587. You may also email File & ServeXpress with any questions to support@fileandserve.com using "San Fran Civil Cases" in the subject line. File & ServeXpress also offers online chat support during business hours from 6 AM to 5 PM PT.

Q. I need to file into a case that I have a case number for, but File & ServeXpress does not seem to have the case, what do I do next?

A. Contact File & ServeXpress Client Support at 888.529.7587 and we will request the case from the Court.

Q. How do I pay eFiling & eService fees?

A. When you electronically file documents with the Court we'll calculate the court's statutory filing fees and advance those fees to the Court on your behalf. Your firm will be invoiced monthly for those advanced filing fees. The cost is only \$7 to eFile and \$8 to eServe, regardless of the size and number of documents or parties on the service list. [Click here to view the pricing information](#) for eFiling and eService.

While EFiled and EServing

Q. How can I find specific rules pertaining to my court, like how to upload exhibits and signature requirements?

A. [Click here to view the local eFiling rules](#). To [view the Special Instructions for eFiling and eService click here](#).

Q. What is the eFiling and eService deadline?

A. The deadline is 11:59 P.M. PT for both eFiling and eService. You may prepare filings in File & ServeXpress 24/7 however the Court requires that you meet the 11:59 P.M. PT deadline in order to receive that day's file-stamp.

Q. If all of the case parties are not listed, can I update the service list?

A. Yes, you may use the Add Party/Attorney feature during your transaction. You may also make changes to the service list even if you don't have anything to file. This will make you eligible to receive eService in the case. [Click here to view the Case & Party Management User Guide](#)

Q. Once I have submitted a filing, are there tools I can use to search or track my cases or other cases in File & ServeXpress?

A. Yes, there are many tools available for searching and tracking your cases. These advanced File & ServeXpress features are discussed in our Advanced Training class. We also have a selection of [user guides available in the File & ServeXpress Resource Center](#).

After You Have EFiled

Q. How can I find the clerk review status of my filings with the court?

A. Click on the transaction number of any previously filed document. The transaction details page will show clerk review status. If a filing has been rejected you may click on the document history to view clerk notes. You will also receive a courtesy email notice informing you of any rejected item.

Q. When our invoice arrives how will our accounting department determine which clients to bill back?

A. You have the option of entering a matter code or case ID into every transaction and your invoice will be itemized. You may also run real-time reports and bill your clients prior to receiving your monthly invoice. [Click here to see the Billing Information User Guide.](#)

Q. What if I have a question and I can't find the answer in any of the provided resources?

A. Contact File & ServeXpress Client Support 24/7 at 888.529.7587 and we will be happy to assist you.

VIII. Who To Contact If You Have Questions

We provide a full spectrum of support. Access our knowledgeable eFiling & eService support teams to get the help you need, when you need it.



24x7 Phone Support

Have Questions? Contact our eFiling specialists today: **888-529-7587**.



Online Chat

[Chat with an eFiling Expert](#)

M-F 5:00am - 4:00pm PT.



Educational Events

From a simple introduction to advanced topics, we offer a variety of in-person [events](#) and [webinars](#).