

How to Create, Add, and Remove Service Contacts in File & Serve HTML 5 (new website)

The first time you electronically file into a case you must add your service contact information to that case (see UTCR 21.100(2)). This must be done for each individual case. Before you can add your service contact information, you must first add yourself as a “Firm Service Contact”. Once you have created a “Firm Service Contact” you can add your service contact information through the electronic filing process.

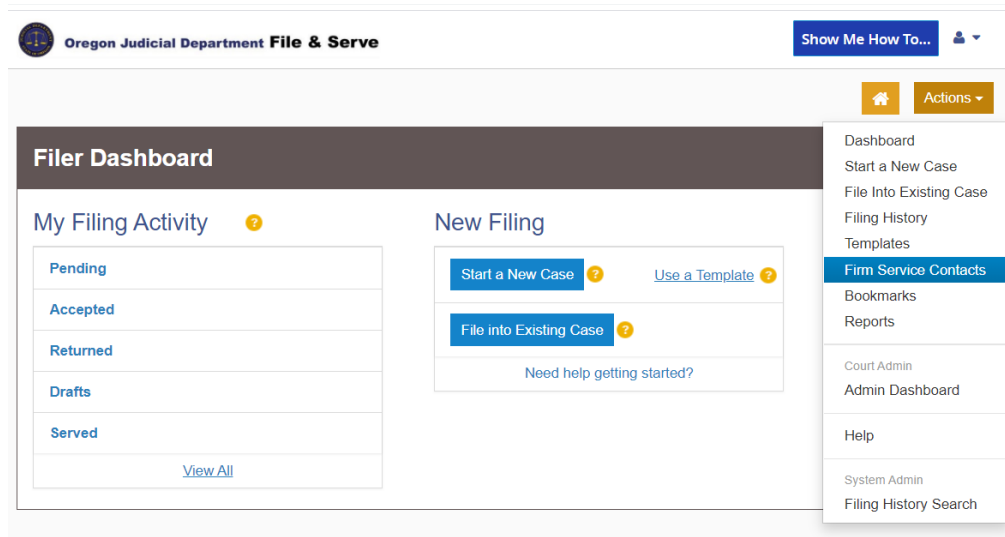
If you have not yet electronically filed into a case but would like to have filings served on you electronically, you can add service contact information without filing anything into the case.

This guide details:

- How to create “Firm Service Contacts”
- How to add “Firm Service Contacts” to a case without submitting a filing
- How to add “Firm Service Contacts” to a case while submitting a filing
- How to remove “Firm Service Contacts” from a case.

How to add a “Firm Service Contact”

1. From the File & Serve home screen, click the “Action” dropdown, then select “Firm Service Contacts”



2. If you are not listed, add yourself as a “Firm Service Contact” by selecting “Add Service Contact”

Note: You only need to add yourself as a “Firm Service Contact” once, but you will have to add your contact information to each individual case

Firm Service Contacts ?		
Search by first or last name		+ Add Service Contact
Name	Email	
Louis Dupree	l.s.dupree@ojd.state.or.us	Actions ▾
Holly Rudolph	Holly.Rudolph@ojd.state.or.us	Actions ▾
Items per page: 10 ▾		1 - 2 of 2 items

3. Add contact information and click “Save Changes”

Note: Consider using the “Administrative Copy” option if you would like other people in your office to receive copies of electronically served documents

First Name	Middle Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Firm Name	Email	Administrative Copy ?
<input type="text"/>	<input type="text"/>	<input type="text"/>
Country	United States of America ▾	
Address Line 1	Address Line 2	City
<input type="text" value="100 High St NE"/>	<input type="text"/>	<input type="text" value="Salem"/>
State	Oregon ▾	
Zip Code	Phone Number	
<input type="text" value="97301"/>	<input type="text"/>	
Make This Contact Public	<input type="checkbox"/>	
	<input type="checkbox"/>	
		Undo Save Changes

How to Add a “Firm Service Contact” to a Case without Submitting a Filing

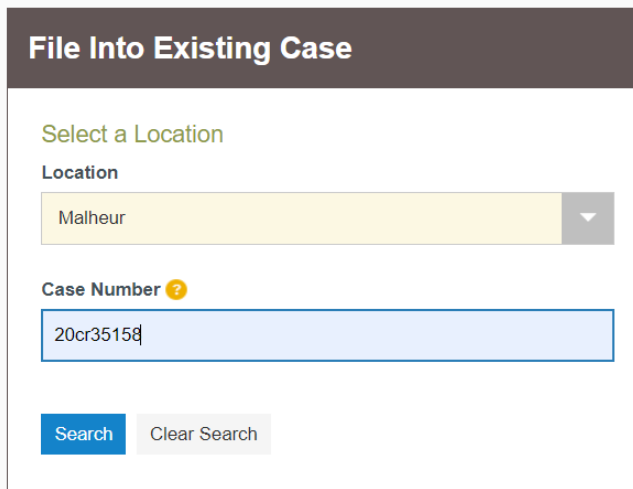
1. From the home screen in File & Serve, click on the “File into Existing Case” option. This option can also be found under the “Actions” tab

New Filing



The 'New Filing' menu contains three items: 'Start a New Case' with a yellow question mark icon, 'Use a Template' with a yellow question mark icon, and 'File into Existing Case' with a yellow question mark icon. Below these items is a link that says 'Need help getting started?'.

2. Select the county, type in the case number, and click “Search”



The 'File Into Existing Case' form has a title bar. Below it, there is a section titled 'Select a Location'. Under 'Location', there is a dropdown menu with 'Malheur' selected. Below that is a 'Case Number' field with a yellow question mark icon, containing the text '20cr35158'. At the bottom, there are two buttons: 'Search' and 'Clear Search'.

3. Select “Action” and click “View Service Contacts”

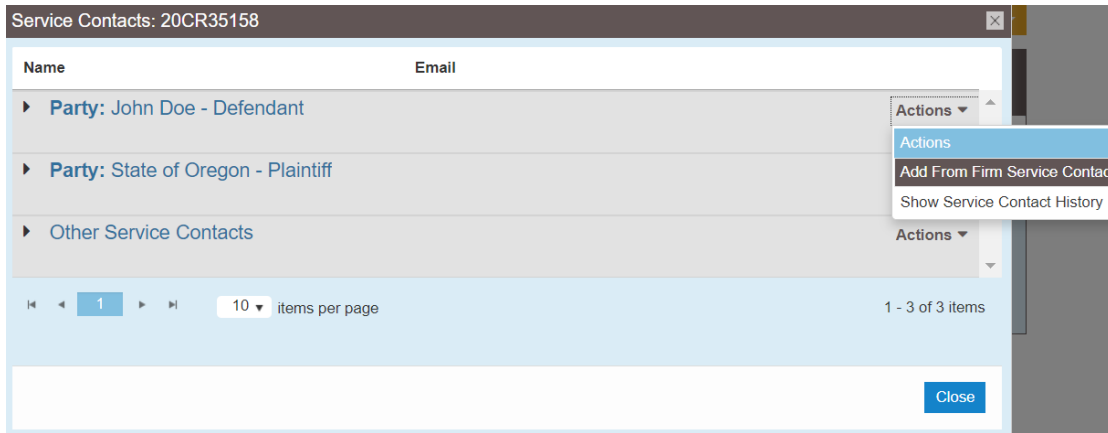


The search results page shows a table with the following data:

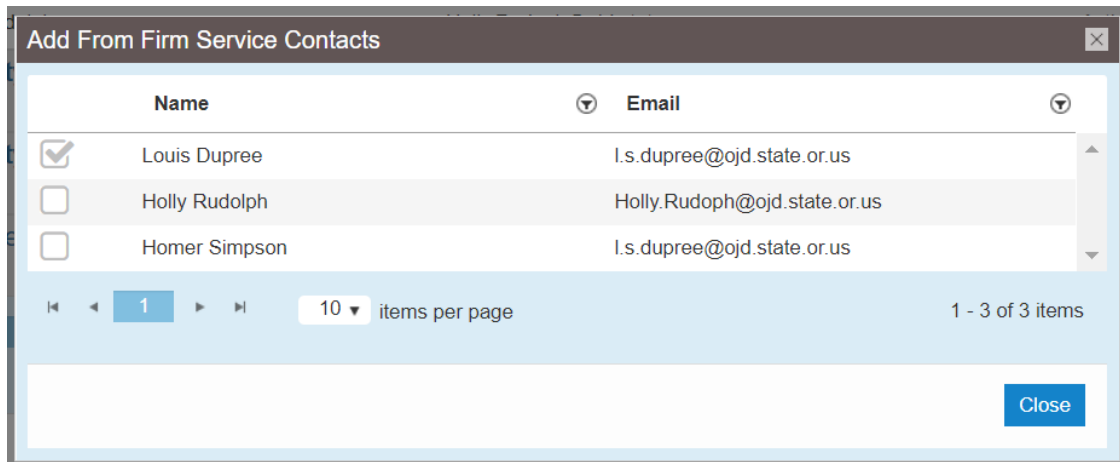
Case Number	Location	Description	Case Type
20CR35158	Malheur	*****	Offense Felony

Below the table, there is a pagination bar showing '1' of 1 items, '20' items per page, and a 'Back to Search' button. An 'Actions' dropdown menu is open over the table, showing options: 'File Into Case', 'File Into Case With Template', 'View Service Contacts' (highlighted), and 'Bookmark This Case'.

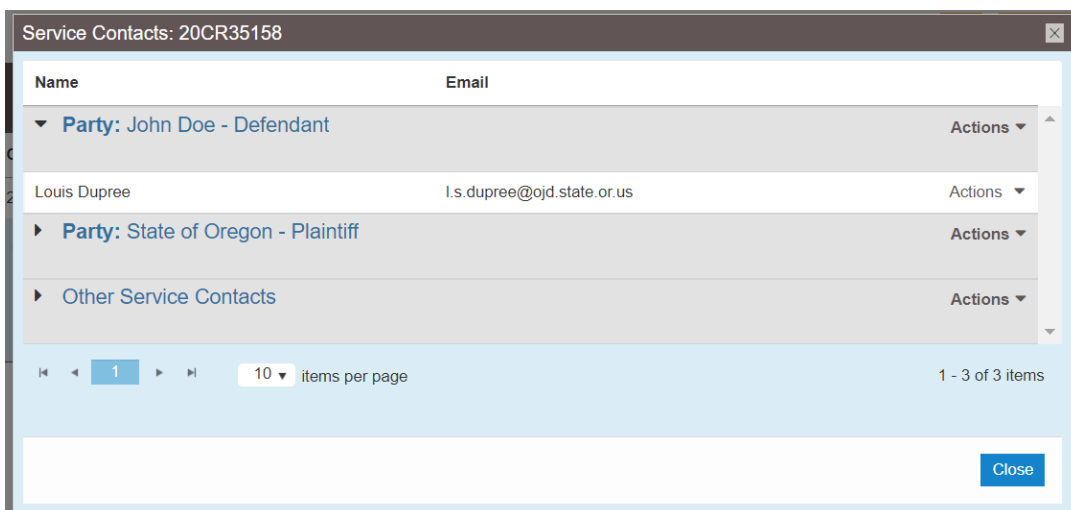
4. From the “View Service Contacts” screen, locate your client, select the “Actions” menu to the right of your client, and click “Add From Firm Service Contacts”



5. Check the box next to your name and click the “Close”



6. To finish, click “Close” from the “View Service Contacts” screen



How to Add a “Firm Service Contact” to a Case while Submitting a Filing

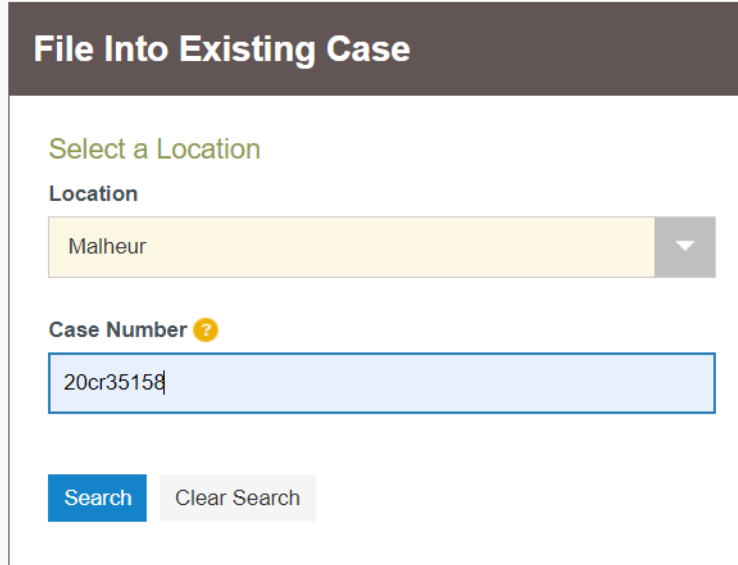
1. From the home screen in File & Serve, click on the “File into Existing Case” option. This option can also be found under the “Actions” tab

New Filing



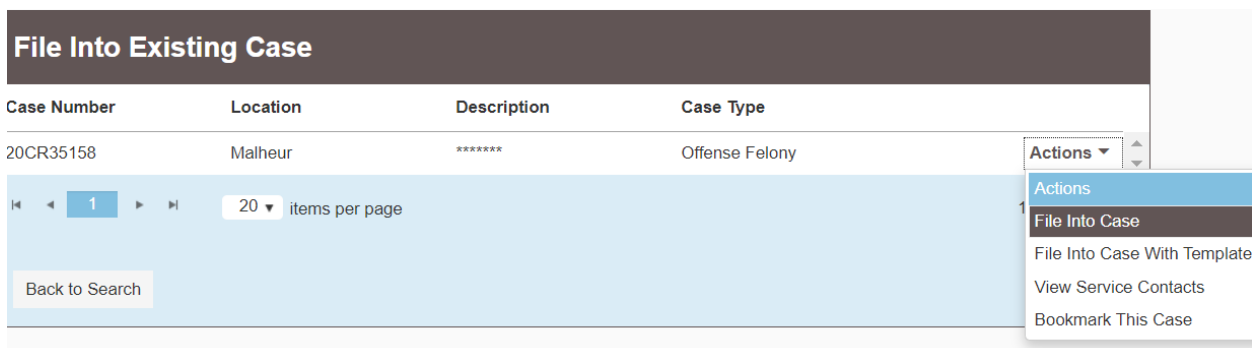
The 'New Filing' menu contains three items: 'Start a New Case' with a help icon, 'Use a Template' with a help icon, and 'File into Existing Case' with a help icon. Below these items is a link that says 'Need help getting started?'.

2. Select the county, type in the case number, and click “Search”



The 'File Into Existing Case' form has a title bar. Below it, there is a section 'Select a Location' with a 'Location' dropdown menu currently showing 'Malheur'. Below that is a 'Case Number' input field with a help icon, containing the text '20cr35158'. At the bottom are two buttons: 'Search' and 'Clear Search'.

3. Select “Action” and click “File Into Case”



The search results page shows a table with the following data:

Case Number	Location	Description	Case Type
20CR35158	Malheur	*****	Offense Felony

Below the table is a pagination bar showing '1' of 1 items per page. A 'Back to Search' button is located at the bottom left. An 'Actions' dropdown menu is open over the table row, listing the following options: 'File Into Case', 'File Into Case With Template', 'View Service Contacts', and 'Bookmark This Case'.

- Under “Filings” select the “EFileAndServe” option

The screenshot shows the 'Filings' form with the 'Filing Type' dropdown menu open. The menu options are 'EFile', 'Serve', and 'EFileAndServe', with 'EFileAndServe' highlighted. The 'Filing Code' is set to 'Motion - MO'. There is a 'Comments to Court' text area and an information icon.

- After entering and saving your filing information, under “Service Contacts” click on the “Actions” dropdown to the right of your client, then select “Add From Firm Service Contacts”

The screenshot shows the 'Service Contacts' form with a red error message: 'Please select at least one service contact for service.' Below the message is a table with columns 'Serve', 'Name', and 'Email'. The table has three rows: 'Party: John Doe - Defendant', 'Party: State of Oregon - Plaintiff', and 'Other Service Contacts'. The 'Actions' dropdown menu is open for the first row, showing the option 'Add From Firm Service Contacts'.

- Check the box next to your name and click the “Close”

The screenshot shows the 'Add From Firm Service Contacts' dialog box. It contains a table with columns 'Name' and 'Email'. The table has three rows: 'Louis Dupree' (checked), 'Holly Rudolph', and 'Homer Simpson'. Below the table is a pagination control showing '1' of 3 items, '10' items per page, and '1 - 3 of 3 items'. A 'Close' button is at the bottom right.

7. Your contact information has been added, proceed with the filing

Service Contacts		Need Help?	
Serve	Name	Email	
▼	Party: John Doe - Defendant		Actions ▼
<input checked="" type="checkbox"/>	Louis Dupree	l.s.dupree@ojd.state.or.us	Actions ▼
▶	Party: State of Oregon - Plaintiff		Actions ▼
▶	Other Service Contacts		Actions ▼

How to Remove a “Firm Service Contact” from a case

1. From the home screen in File & Serve, click on the “File into Existing Case” option. This option can also be found under the “Actions” tab

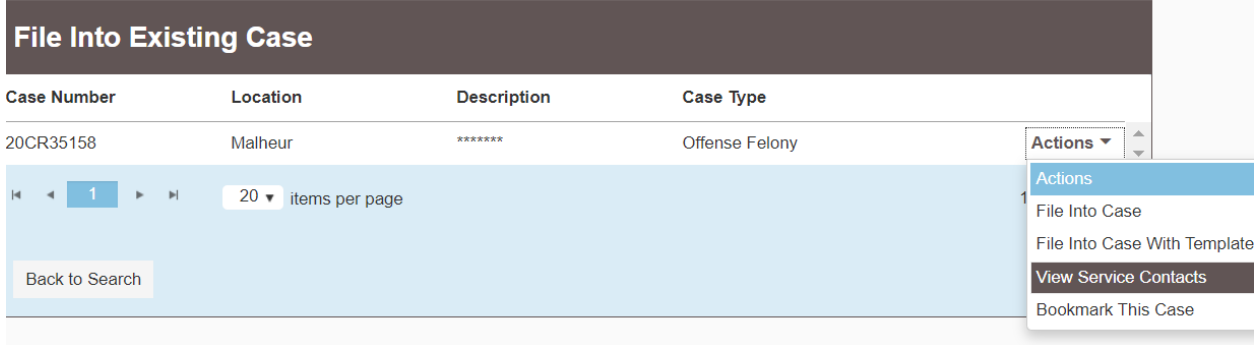
New Filing

Start a New Case ?	Use a Template ?
File into Existing Case ?	
Need help getting started?	

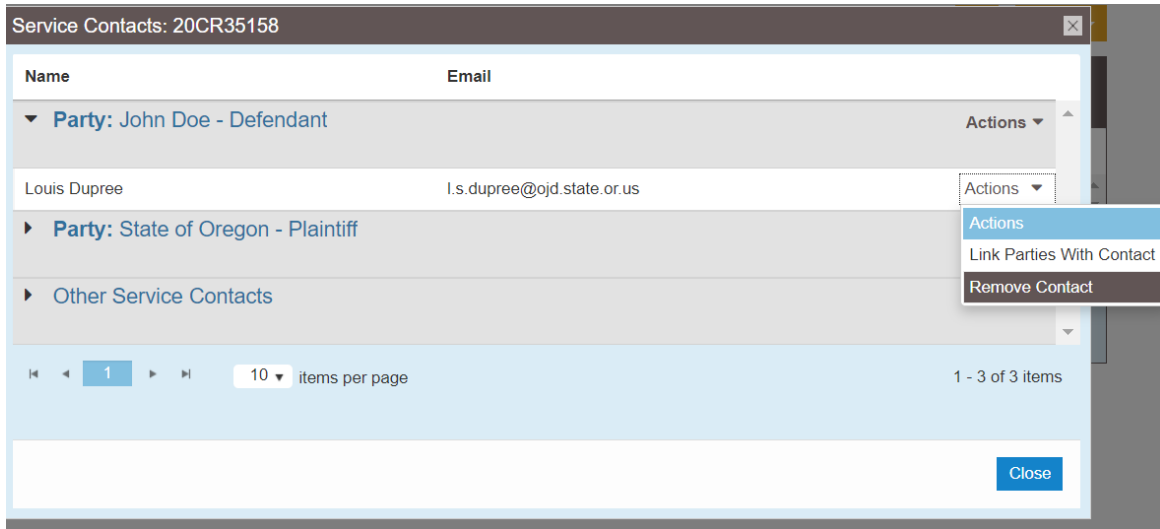
2. Select the county, type in the case number, and click “Search”

File Into Existing Case	
Select a Location	
Location	Malheur ▼
Case Number ?	20cr35158
Search	Clear Search

3. Select "Action" and click "View Service Contacts"



4. From the "View Service Contacts" screen, locate your name, select the "Actions" menu to the right of your name, and click "Remove Contact"



5. To finish, click "Close"

