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.

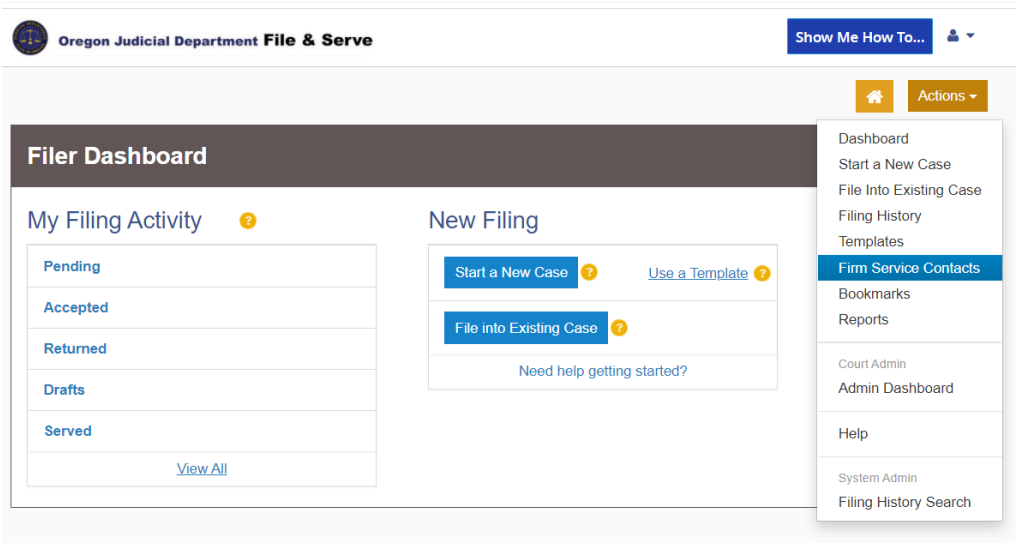
If you have not yet electronically filed into a case but would like to have filings served on you electronically, you can add service contact information without filing anything into the case.

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.

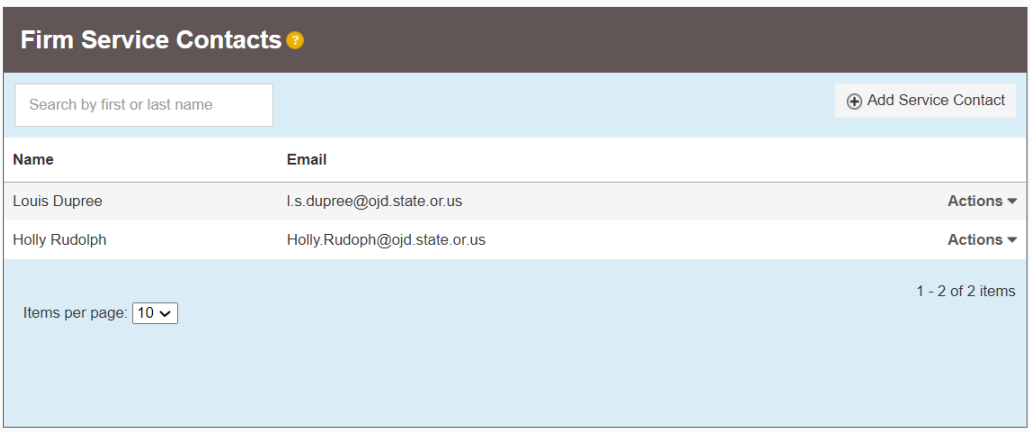
How to add a "Firm Service Contact"

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



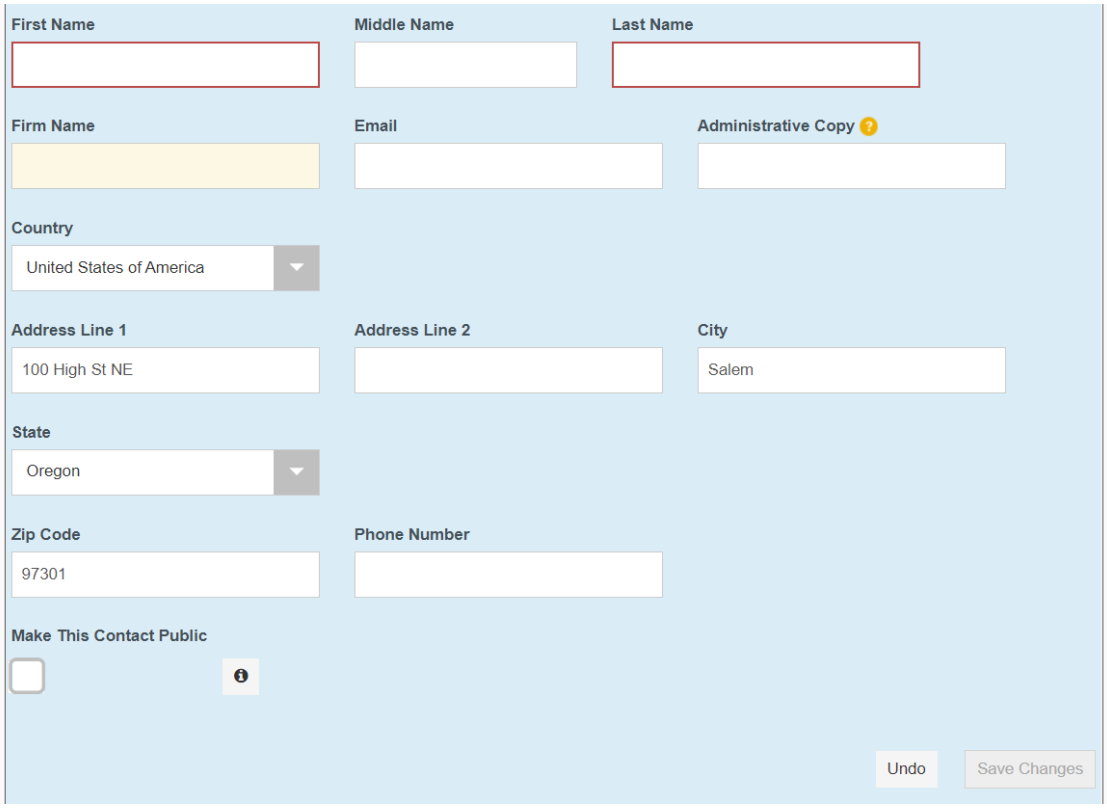
2. If you are not listed, add yourself as a "Firm Service Contact" by selecting "Add Service Contact"

   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



3. Add contact information and click “Save Changes”

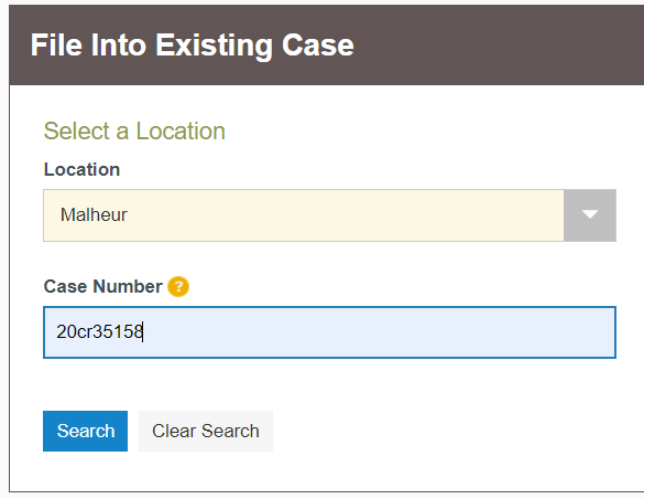
   Note: Consider using the “Administrative Copy” option if you would like other people in your office to receive copies of electronically served documents



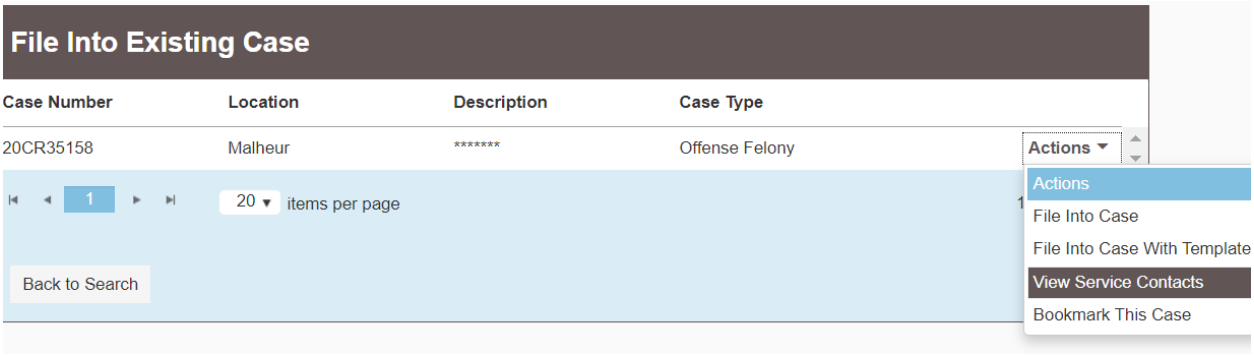
How to Add a "Firm Service Contact" to a Case without Submitting a Filing

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

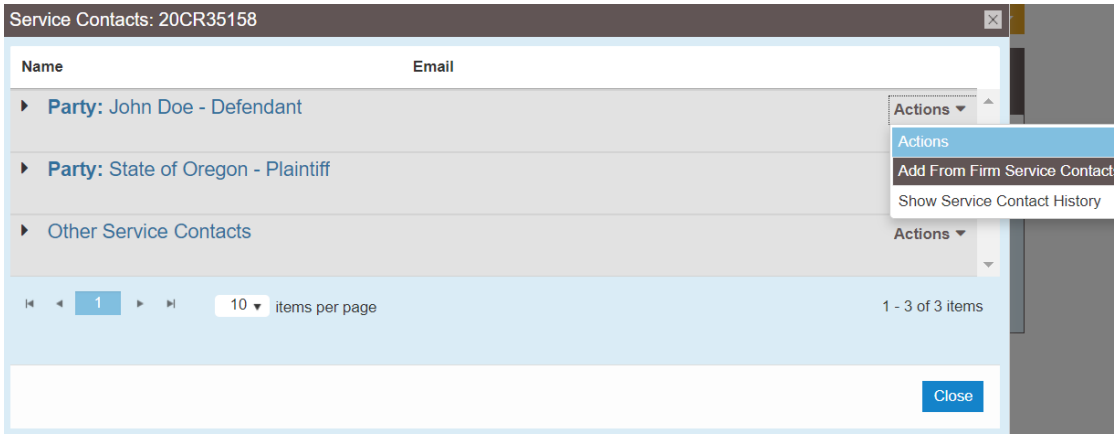
2. Select the county, type in the case number, and click "Search"



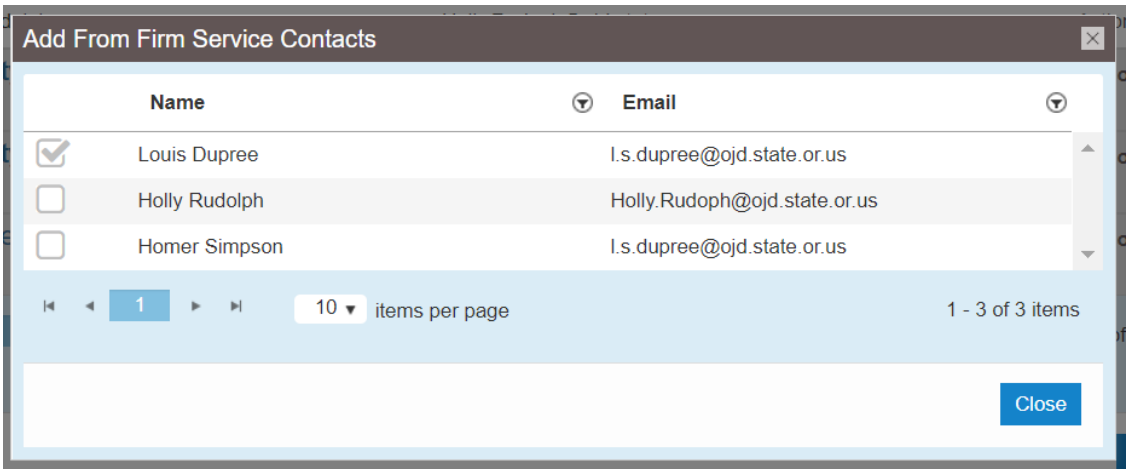
3. Select "Action" and click "View Service Contacts"



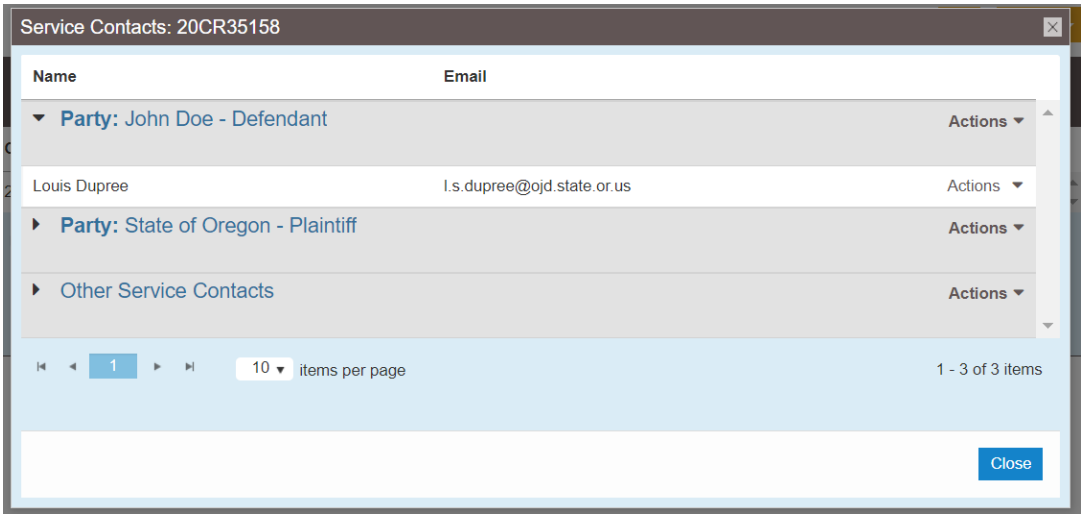
4. From the “View Service Contacts” screen, locate your client, select the “Actions” menu to the right of your client, and click “Add From Firm Service Contacts”



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



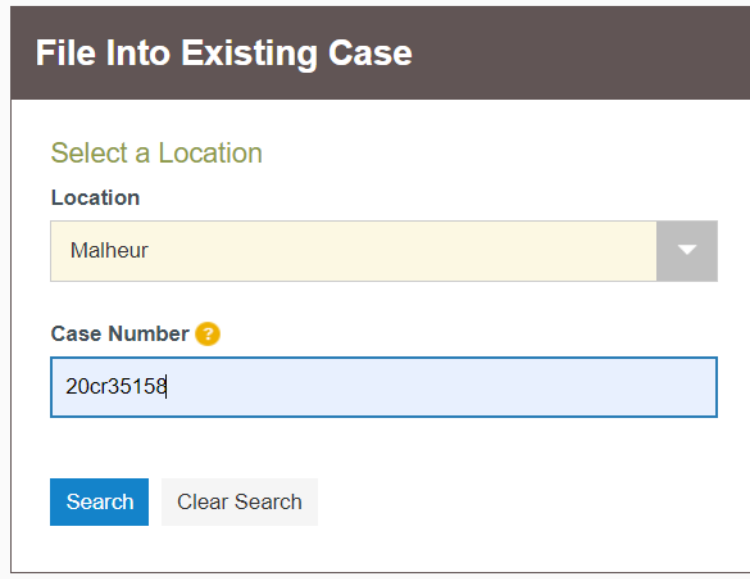
6. To finish, click “Close” from the “View Service Contacts” screen



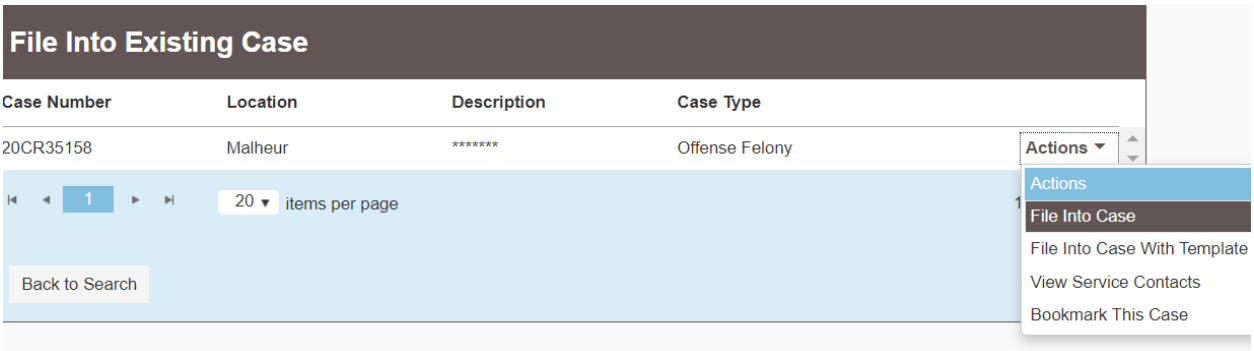
How to Add a "Firm Service Contact" to a Case while Submitting a Filing

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

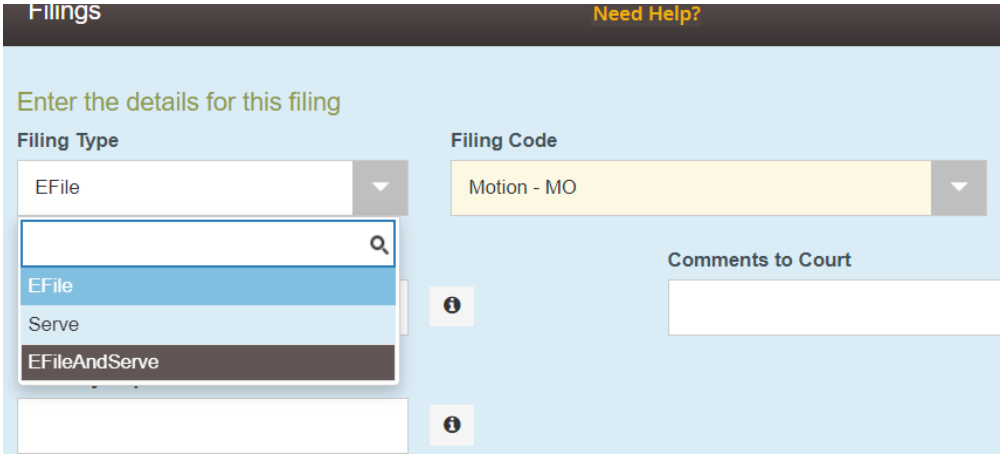
2. Select the county, type in the case number, and click "Search"



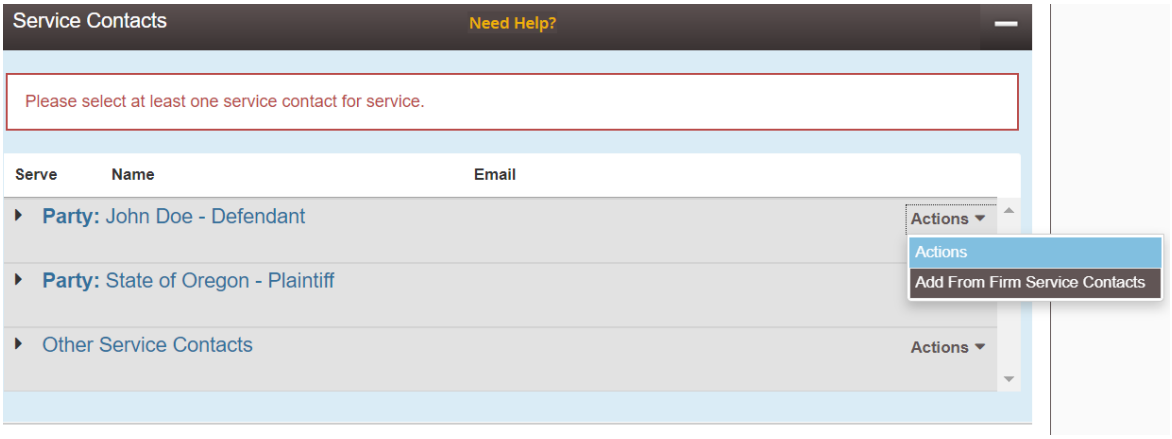
3. Select "Action" and click "File Into Case"



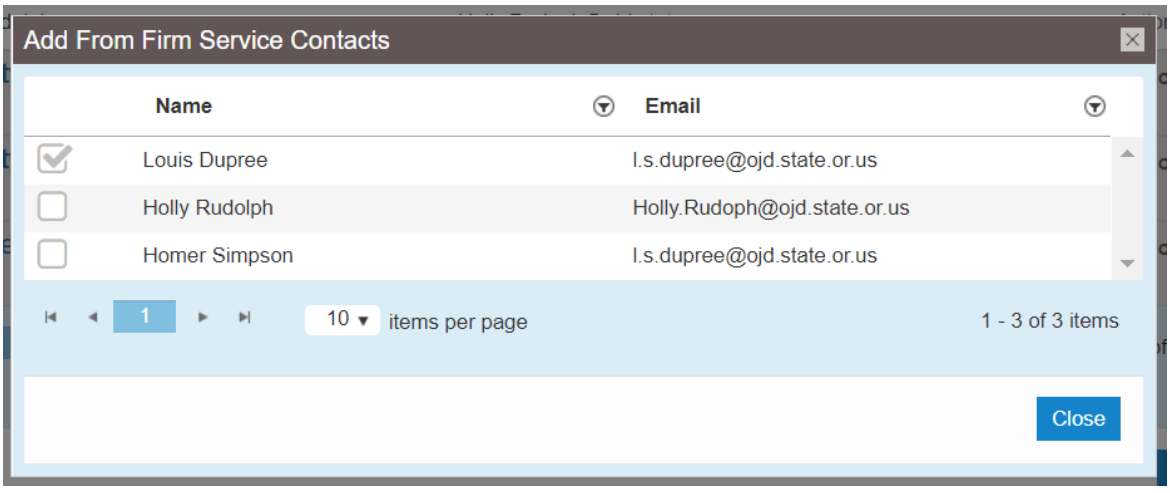
4. Under “Filings” select the “EFileAndServe” option



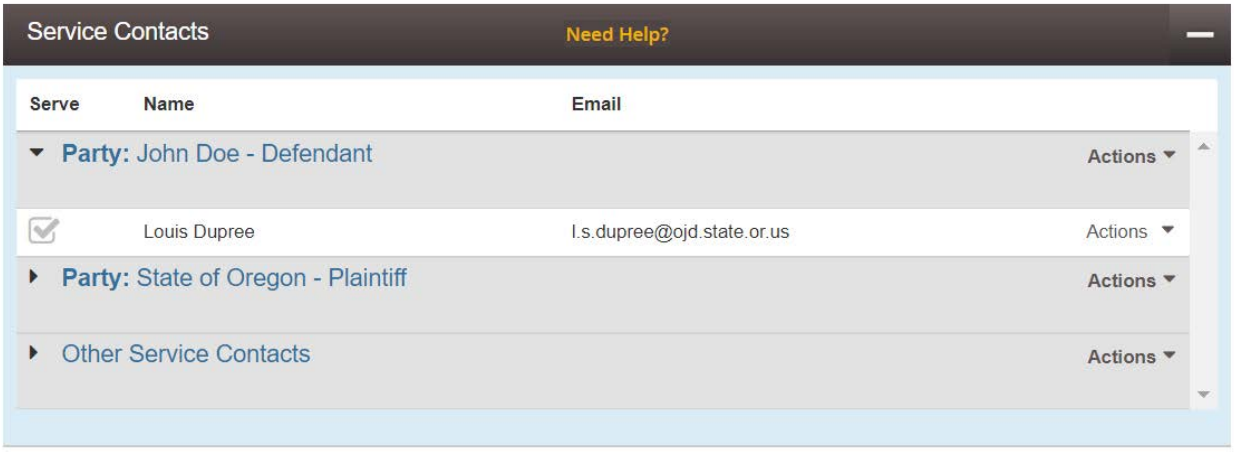
5. After entering and saving your filing information, under “Service Contacts” click on the “Actions” dropdown to the right of your client, then select “Add From Firm Service Contacts”



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



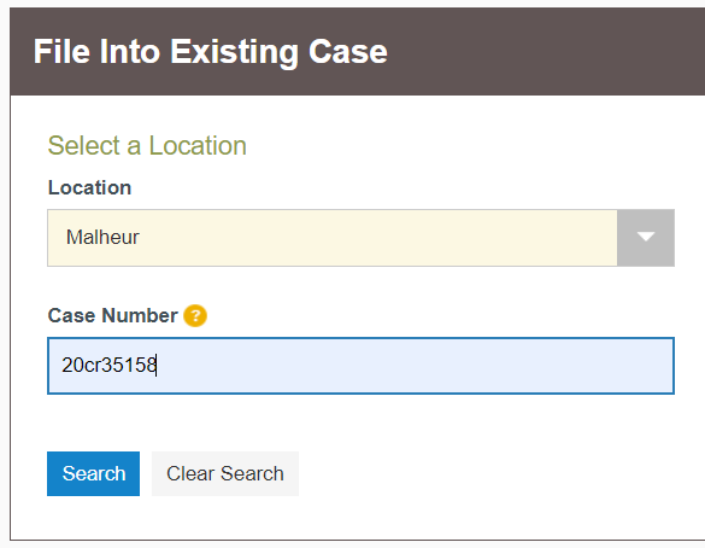
7. Your contact information has been added, proceed with the filing



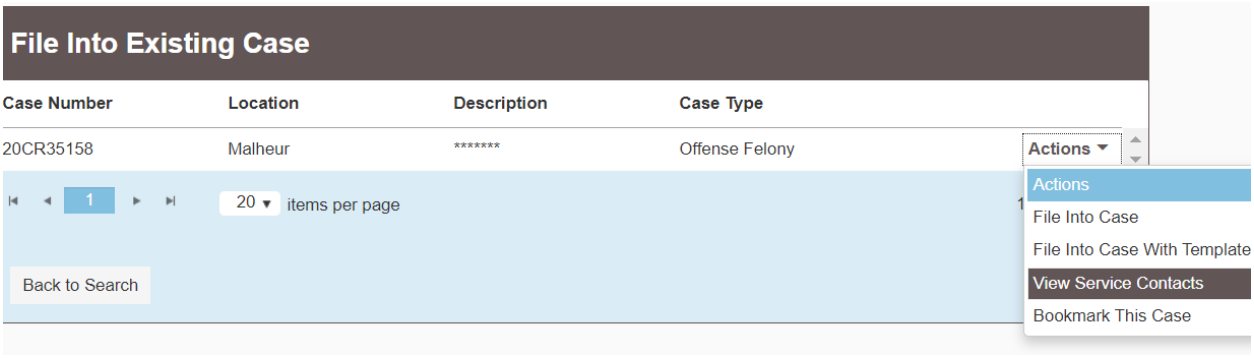
How to Remove a "Firm Service Contact" from a case

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

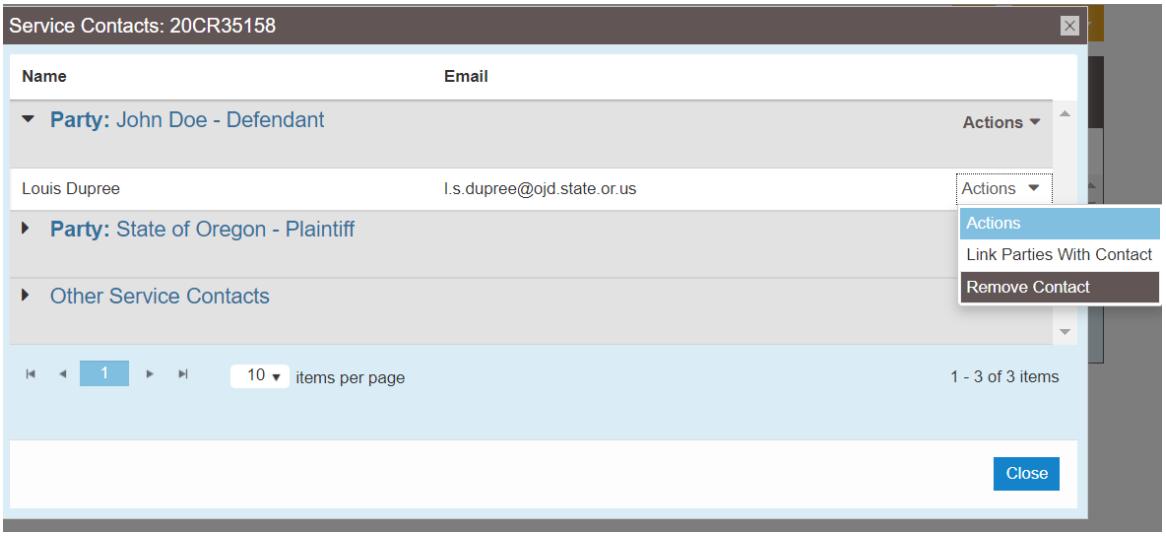
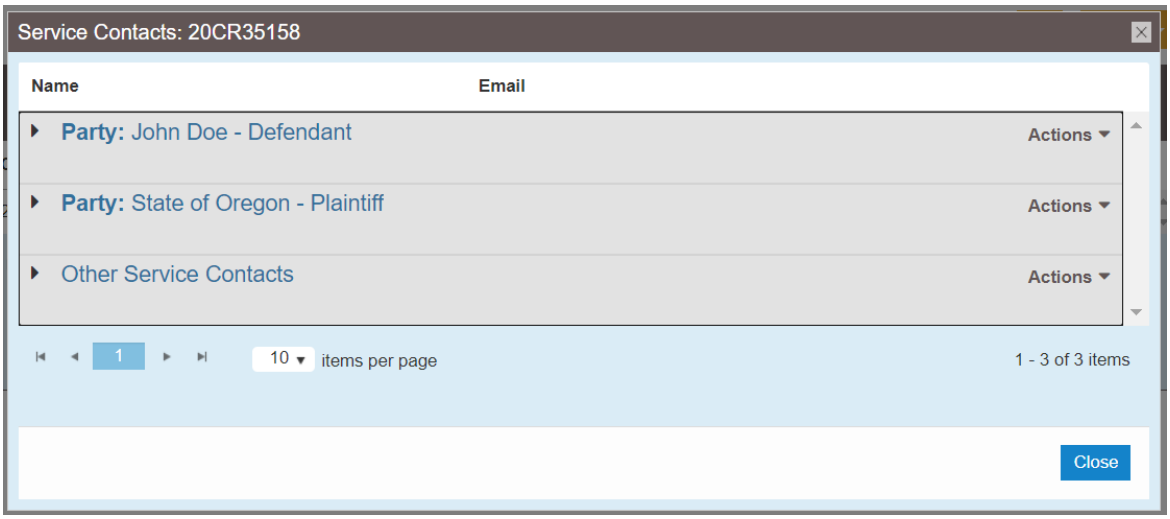
2. Select the county, type in the case number, and click "Search"



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”