

# LexisNexis® File & Serve NEWSLETTER

Friday, May 21, 2010

## NEWS & ANNOUNCEMENTS

### BEFORE LEAVING A FIRM...

It is important to understand the impact that the move will have on your File & Serve cases. The cases on File & Serve follow the attorney not the firm. To make sure the cases are left with the correct attorney of record you will need to obtain a list of all cases the departing attorney is listed on. This information can be found by running a Cases Search.

1. From the home screen click on the Search tab and then select the Cases Search.
2. From the drop down select Colorado as the jurisdiction and enter the first and last name field with leaving attorneys name.
3. Click View and will get a report of all the cases in which that attorney is designated as the attorney or record.

#### LexisNexis® File & Serve



#### Cases Search

Use this search to see a list of all cases in a court, the transactions in those cases, and the parties in the

**Define your search:** (\* indicates a required field.)

1. Select Jurisdiction.
2. To change the scope of your search, select or enter additional information in subsequent fields.
3. Then click **View**.

Using the results from the Cases Search determine the cases that should move with the departing attorney and the cases that should remain.

- For the cases that should remain with the firm a substitution of counsel should be filed with the court PRIOR to the move.
- For cases that will move a Notification of Change needs to be filed with the court.

Note: If you are dealing with a high volume of changes contact your local court to review the possibility of submitting the changes in an Excel spreadsheet.

In addition to ensuring that the cases have the proper representation, you should also update your new firm information with attorney registration. Go to the Offices of Attorney Registration website for more information.

<http://www.coloradosupremecourt.com/Registration/AttServices.asp>

For help running a Cases Search which will produce a list of all cases an attorney is designated as attorney of record, please call File & Serve customer service at 1-888-529-7587, or contact your Colorado training specialist.

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## PERSPECTIVES

### File & Serve Training Offerings:

#### Web Classes:

**Complimentary** open enrollment training is available online by clicking on the [Resource Center](#) link on the **File & Serve** home page. Click on the Education & Training link, choose the state of Colorado and you will see a list of classes we offer to our Colorado customers. You can register by clicking on the name of the class and completing the registration form online. You will then receive an email with registration confirmation and logon details.

#### Colorado Bar Association Classes:

The Colorado Bar Association sponsors complimentary **File & Serve** training every month! Attorneys & law firm staff are welcome. 2 CLE credits are available to attorneys who complete the training.

#### Location:

Colorado Bar Association  
1900 Grant Street, 9<sup>th</sup> Floor  
Denver, CO 80203

Dates of upcoming classes are:

- **June, 7 2010**
- **July 12, 2010**
- **August 2, 2010**

To register, please call COBAR:

**(303) 860-1115**

## TIPS & TRICKS

### New Schedule for COBAR Classes

#### File & Serve Basic Training- Colorado Courts

10:00 - 11:30 a.m. This is an informative session geared toward sharpening your *File & Serve* skills. Two (2) general CLE credits offered.

#### Topics include:

- The *File & Serve* Home Page, including the “Inbox” (area of official service)
- The Filing & Service Tab: e-filing a new case and then e-filing and e-service in an existing case
- The *File & Serve* Preferences area
- The Resource Center

#### File & Serve Advanced Training & Specialized Use

1:00 - 2:30 p.m. This class is offered to advanced *File & Serve* users only. You must be a frequent filer or have attended the *Basic Colorado Courts File & Serve Training* before attending this class. Two (2) general CLE credits offered.

#### Topics include:

- County Court Judgment Tab
- Probate and Civil Water Additional Information Tab
- Linking to the lower court record when initiating a court of appeals case
- Searches
- Tracked Items
- Alerts
- Transaction Report
- Read Status

### CUSTOMER SERVICE

**File & Serve** offers Customer Support 24 hours a day, 7 days a week. If you have any questions, don't hesitate to call our Customer Service department at:

**1-888-529-7587**

### New E-file Enabled Probate Case Type

Trust Registrations are now available for e-filing in all Colorado District Courts.

Case Class: Probate

Case Type: Trust Registration

Document Type: Trust Registration Statement\*

\*There is a statutory fee associated with this document type.

Trust Registrations that are e-filed will be assigned a PR case number.

*Note:* Trust Registration forms are available on the state's website.  
[http://www.courts.state.co.us/Forms/Forms\\_List.cfm/Form\\_Type\\_ID/167](http://www.courts.state.co.us/Forms/Forms_List.cfm/Form_Type_ID/167)

### NEXT MONTH'S NEWSLETTER...

Coming in June 2010:

#### “The New E-filing Chief Justice Directive”

#### June's Tip/Trick:

**What 30 minute web-based refresher classes do you need/want and why?** The reader who sends in the best answer will receive a \$10 Starbucks Gift Card. E-mail your answer to: [roberto.rodriguez@lexisnexis.com](mailto:roberto.rodriguez@lexisnexis.com) by June 11, 2010. Each month's winner will be notified by e-mail or phone call. Winning submissions may be published in future newsletters.

### CONTACT INFORMATION

CO Law Firm Training Specialist Firm's I-Z

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#### Private Webinar Training

Please contact me directly via e-mail to schedule private webinar training for you and/or your firm!