



FILE & SERVE USER GUIDE FOR FACILITIES: INVOLUNTARY COMMITMENT PETITIONS

October 2023

User Role: Mental Health Facilities, Hospitals, any facility initiating an Involuntary Commitment

Summary: This is for INITIATING an involuntary commitment via File and Serve. Mental health facilities will use this process when they are initiating an involuntary commitment.

1. Log into [File & Serve](#).
2. Click "Start Filing":

Start Filing

Click the **START FILING** button below to get started.

Start filing

3. Click "Start New Case":

File New Case

If you do not have a case number and you want to start a new case for the first time.

Start new case

4. From the Case Information screen:
 - a. From the court location dropdown, select the applicable county's DISTRICT COURT

- b. From the case category dropdown, select PROBATE
- c. From the case type dropdown, select SPECIAL PROCEEDING CONFIDENTIAL (COMMITMENT)
 - i. *Note: confirm you've selected Special Proceeding Confidential (COMMITMENT) rather than Special Proceeding Confidential (Other).*
- d. Click the Parties button at the bottom of the page

Case Information

Court location *

Wake District Court x ▼

This is the court where you are filing your case.

Case category *

Probate x ▼

This is the type of case you are filing (Family, Probate, or Civil).

Case type *

Special Proceeding Confidential (Commitment) x ▼

If you can't find your case type, change the case category to see other case types.

Parties →

- 5. From the Parties screen, click to add party details of the petitioner:

Parties

Party Type	Party Name	Lead Attorney	Actions
⚠ Petitioner *	+ Add party details		
⚠ Respondent *	+ Add party details		

+ Add More

- a. If your petitioner is the provider/clinician, add that person's information. If your petitioner is the facility, toggle to the "Entity" screen and add the facility's information:

Party Information

Enter the name(s) of the people or entities involved in the case.

Party Type

Petitioner

Person

Entity

Entity Name *

XYZ Hospital

Party CMS ID

- i. *Note: You do NOT need to enter data into the Party CMS ID field.*



- b. Fill out the petitioner's contact information:

Contact Information

You need to know the party's full address to add it. If you do not know the party's full address, you can e-file without the address

Country ▼
United States

Address Line 1 *
123 Main Street

Address Line 2

City *State *▼Zip Code *
27603

RaleighNorth Carolina

Phone Number
919-555-5555

- c. You do NOT have to select an attorney from the attorney information dropdown if one is not applicable.
- d. Click SAVE at the bottom right corner of your screen:

Cancel

Save

6. From the party screen, click to add the party details of the respondent:

Parties			
Party Type	Party Name	Lead Attorney	Actions
✔ Petitioner *	XYZ Hospital		✎
⚠ Respondent *	+ Add party details		
<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">+ Add More</div>			

- a. Enter all of the party information for the respondent that is available:

Party Information

Enter the name(s) of the people or entities involved in the case.

Party Type
Respondent

Person

Entity

First Name *Middle NameLast Name *Suffix
Select...
▼

MelNColley

Party CMS ID

Driver License Type ▼Driver License State ▼Driver License Number

Select...North Carolina12345678

Social Security Number

- i. Note: You do NOT need to enter data into the Party CMS ID field.



- b. Enter all of the contact information for the respondent that is available:

Contact Information

You need to know the party's full address to add it. If you do not know the party's full address, you can e-file without the address

Country
United States

Address Line 1 *
123 Test Lane

Address Line 2

City *
Raleigh

State *
North Carolina

Zip Code *
27603

Phone Number
919-999-9999

- c. You do NOT have to select an attorney from the attorney information dropdown if one is not applicable.
- d. Click SAVE at the bottom right corner of your screen:

Cancel Save


7. Once you have entered your parties, click the Filings button at the bottom right of your screen:

← Case Information Filings →

8. From the filings screen, click the Add Filing button to add your filing:

Filings

Max Envelope Size: 36.70 MB
Remaining: 36.70 MB

Filing Code	Filing Type	Description	Actions
 <p>No Filings Added Yet At least one filing is required to complete the filing process.</p> <p>+ Add filing</p>			

- a. Your filing type will automatically be selected as eFile Only. Select the applicable filing code from the dropdown (when submitting a Petition for Involuntary Commitment, that is the code you will select):



Filing Type * (Required)

eFile Only

Pick "eFile Only" to just electronically file your papers.

Filing Information

Filing Code*
 Petition for Involuntary Commitment

Client Reference Number

Filing Description

Comments to Court

- i. *Note-Client Reference Number is any internal number that YOUR facility uses to track records—it is NOT required and will NOT affect your filing.*
 - ii. *Note-you can add comments to the court if applicable, but this is NOT a required field and leaving it blank will NOT affect your filing.*
- b. To upload your document, click Select File and choose the appropriate PDF from your computer:

Upload Documents
 To add more than one lead document to the filing, create another filing and upload your document.

Lead Document * Required

Drag files here or

Select file

Maximum file size: 26.21 MB
 Accepted file types: Portable Document File (PDF), Word 2007 File (DOCX), Word 97/XP File (DOC)

- i. *Note-Involuntary Commitment Petitions will need to be saved as a .PDF on your computer to upload into File and Serve.*
- c. Once your document is uploaded, select the document security group as PUBLIC:

Upload Documents
 To add more than one lead document to the filing, create another filing and upload your document.

Lead Document

IVC Petition.pdf

Auto-Redact Remove

IVC Petition.pdf

Public

1.
 - i. ***NOTE- The document security group should be set as public but the CASE ITSELF IS CONFIDENTIAL so the public will NOT have access to any information provided. Information will not appear in the public portal, on public terminals, or even to clerks who have not been granted elevated access to these case types. If the documents are not labeled "public", if a case gets transferred to another county for hearing, the clerk in the other county will not be able to access them. Rest assured that the case itself is still confidential and tightly***



locked down with multiple security measures to ensure no one can access this confidential information that shouldn't.

- ii. *NOTE-do NOT click the Auto-Redact button.*
- d. Click SAVE at the bottom right corner of your screen:



- 9. Once you've uploaded your documents to submit to the magistrate, click SERVICE at the bottom right corner of your screen:



- 10. You do NOT have to enter any service contacts to this page so click Fees at the bottom right corner of your screen:



- 11. From the Fees screen, select Waiver from the payment account dropdown, the Petitioner as the party responsible for fees, and the applicable selection from the filing attorney dropdown:

Fees

You must select a payment account even if there are no fees.

Payment Account *
Waiver Waiver x ▼

Party Responsible for Fees
XYZ Hospital ▼

Filing Attorney *
Test Dummy Attorney x ▼

- 12. Click Summary at the bottom right corner of your screen:



- 13. Click to check all Submission Agreements:

Submission Agreements *


By checking this box, I agree that the information in this filing is true to the best of my knowledge, information, or belief. I also understand that persons who make false filings can be subject to legal penalties or sanctions and, depending on the situation, may be charged with a crime.

IMPORTANT NOTICE:It is prohibited for any person preparing or filing a document in the official records of the North Carolina courts to include any of the following personal identifying information (PII) in that document unless expressly required by law or court order or redacted: • Social security numbers• Employer taxpayer identification numbers• Drivers' license numbers• State identification numbers• Passport numbers• Checking account numbers• Savings account numbers• Credit card numbers• Debit card numbers• Personal identification (PIN) codes• Passwords Violation of this law may be prosecuted as an infraction, punishable by a fine of up to \$500.00 per violation. N.C.G.S. 132-1.10(d).https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/BySection/Chapter_132/GS_132-1.10.pdf

I have read this notice. I understand that, if I file, I must comply with the filing and redaction requirements set forth in N.C.G.S. 132-1.10(d).



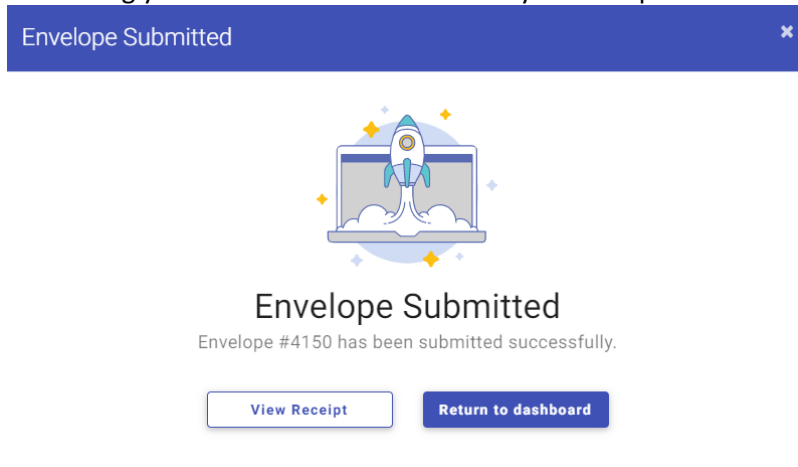
14. Review your information. If anything is incorrect, you can click the edit button to go back to that screen and make edits:

Parties			 Edit
Party Type	Party Name	Lead Attorney	
Respondent	Mel N Colley		
Petitioner	XYZ Hospital		

15. Once you have confirmed that all of your information is correct, click SUBMIT at the bottom right corner of your screen:



16. Once your filing has been submitted, you will get a pop-up window with an envelope number confirming your submission. You can view your receipt or return to your dashboard:



17. The email address associated with the account will also receive an email confirming the submission (or an error email if there is an issue). Once the submission has been accepted by the clerk, the email address associated with the account will receive another email that indicates acceptance and provides a file number.

