

Florida 

E-filing & Service of Process Vendor Checklist

15 questions Florida law firms should ask before
selecting a litigation support service provider

A Practical Vendor-Evaluation Guide

Choosing a litigation support service vendor is not a minor administrative decision. A rejected filing, delayed serve, incomplete return of service, or unresolved exception can create rework, compress deadlines, interrupt case progression, and force your staff to manage work they believed they had outsourced.

Use this guide to answer four practical questions:

- Can the vendor do the work correctly?
- What happens when something goes wrong?
- Can the vendor document and defend the work?
- Will the workflow make your team's job easier?

For each of the 15 questions, note what the vendor says, listen for evidence of a disciplined process, and watch for answers that create more uncertainty than confidence.

Why the Wrong Vendor Gets Expensive Fast

COST	WHAT IT LOOKS LIKE
Rejected filings	Staff correct documents, resubmit them, monitor compressed deadlines, and explain delays internally.
Failed or delayed service	Matters stall while the firm searches for addresses, requests new attempts, or evaluates another method.
Poor visibility	Staff repeatedly ask whether a filing was accepted, an attempt occurred, or an affidavit was returned.
Weak escalation	Address problems, access restrictions, unavailable registered agents, and missing documents remain unresolved until deadlines become urgent.
Administrative drag	The firm re-enters information, transfers documents manually, reconciles separate systems, and retrieves records from scattered locations.

[**The takeaway**] The best vendor is not merely the one that completes routine orders. It is the one that prevents avoidable errors and makes exceptions visible early.

Can They Do the Work Correctly?

QUESTION 1: What measurable filing and service results can you provide?

Ask

What performance metrics do you track, and can you provide results relevant to the courts, counties, case types, and service volume our firm handles?

Listen For

- ▶ Filing-acceptance rates
- ▶ Filing turnaround by court or case type
- ▶ Time from filing acceptance or summons issuance to service dispatch
- ▶ Time to first attempt
- ▶ Successful-service and address-failure rates
- ▶ Time from completed service to returned documentation
- ▶ Frequency and causes of corrected returns
- ▶ Clearly defined calculation methods

Red Flag

“We have a very high success rate,” without data, definitions, or results relevant to Florida.

Evidence to request

- ▶ Sample performance report
- ▶ County- or case-type-level metrics
- ▶ Client references involving comparable work

QUESTION 2: What quality-control steps occur before submission or dispatch?

Ask

What does your team validate before a filing reaches the court or a service assignment reaches the field?

For electronic filing (e-filing), listen for:

- | | |
|--|---|
| ▶ Court, county, division, and case type | ▶ Required signatures, exhibits, and fees |
| ▶ Party information | ▶ PDF format, file size, and confidentiality requirements |
| ▶ Case number | ▶ Summons and proposed-order procedures |
| ▶ Document title and filing code | ▶ Clerk-specific administrative requirements |

For service of process, listen for:

- ▶ Exact defendant name
- ▶ Individual or entity type
- ▶ Correct summons and pleadings
- ▶ Residential, business, registered-office, or other authorized address
- ▶ Service deadline
- ▶ Requested or authorized method
- ▶ Known access restrictions
- ▶ Previous attempt information
- ▶ Whether the assignment crosses county or state lines

+ Strong answer

Before dispatch, we verify the defendant type, documents, address, deadline, authorized server, requested method, and any special return requirements. Exceptions are routed to an experienced reviewer.

- Weak answer

The client enters the information, and the system sends it through.

QUESTION 3: How do you manage rush and deadline-sensitive matters?

? Ask

How do you determine whether a deadline can be met, and what happens when an assignment becomes urgent?

» Listen for

- ▶ Defined standard, priority, rush, and same-day service levels
- ▶ Named escalation personnel
- ▶ Deadline review before order acceptance
- ▶ After-hours filing capability
- ▶ Early warning when a requested turnaround is unrealistic
- ▶ Documented same-day attempt results
- ▶ Visibility into the time allowed for initial service

Florida Rule of Civil Procedure 1.070(j) generally provides 120 days after filing the initial pleading to serve the initial process and pleading. [View the official Florida court source](#)

🚩 Red Flag

“Just mark the order urgent and we’ll do our best.”

QUESTION 4: How do you manage Florida court-specific filing requirements?

? Ask

How do you account for differences among Florida courts, counties, divisions, case types, and clerk procedures?

» Listen for

- ▶ Circuit and county courts
- ▶ Civil divisions and case-type distinctions
- ▶ The Florida Courts E-Filing Portal
- ▶ Summons issuance procedures
- ▶ Filing codes and document descriptions
- ▶ Confidential-information requirements
- ▶ Proposed-order procedures
- ▶ Clerk review and correction processes
- ▶ County- and division-specific administrative practices

The [Florida Courts E-Filing Portal](#) provides the statewide system used for electronic court submissions. Florida's rules establish the Portal framework, but clerk and court administration may still vary by county, division, and document type.

The vendor should explain how it

- ▶ Keeps procedural information current
- ▶ Identifies the correct court and division
- ▶ Handles filings placed in a correction queue
- ▶ Obtains issued summonses
- ▶ Communicates clerk responses
- ▶ Accommodates local procedures without shifting the research burden back to the law firm

🚩 Red flag

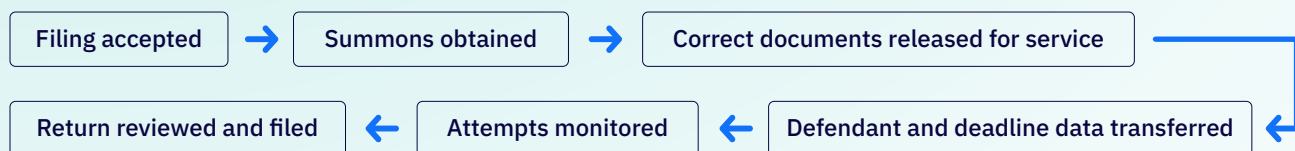
"New York is statewide, so the process is basically the same everywhere."

QUESTION 5: How do you distinguish electronic filing from initial service of process?

? Ask

What happens after the complaint is accepted and the summons is issued?

» Listen for



Electronic filing and electronic service of later documents do not replace initial service of process. Florida Rule of General Practice and Judicial Administration 2.516 governs service of pleadings and documents during a case, while original process must be served under Chapter 48 and the applicable procedural rules. [View Rule 2.516](#)

🚩 Red flag

The vendor describes filing through the Portal or emailing a document as though that alone completes initial service.

QUESTION 6: How do you ensure service complies with Florida requirements?

Ask

How do you identify the correct service workflow for the defendant and circumstances?

Listen for differences in

- ▶ Individuals
- ▶ Corporations
- ▶ Limited liability companies
- ▶ Partnerships
- ▶ Public agencies and officers
- ▶ Registered agents
- ▶ Nonresidents
- ▶ Parties located outside Florida
- ▶ Substituted service
- ▶ Service by publication

[Florida Statutes Chapter 48](#) establishes different requirements depending on the party and method involved. Section 48.031 addresses service generally, while separate provisions apply to entities, public bodies, nonresidents, and other categories.

The vendor should also explain how it

- ▶ Confirms defendant type
- ▶ Identifies an authorized recipient
- ▶ Verifies registered-agent information
- ▶ Documents representative capacity
- ▶ Coordinates out-of-state service
- ▶ Handles substituted-service requirements
- ▶ Escalates facts requiring attorney direction

Strong answer:

The defendant type and service location determine our intake questions, server assignment, authorized-recipient review, field instructions, and return-of-service format.

Weak answer:

Our servers know how to serve everyone.

QUESTION 7: How do you manage Florida process-server authorization?

Ask

How do you confirm that the individual assigned to serve process is authorized in the county or judicial circuit where service will occur?

Listen for

- ▶ Verification of sheriff-appointed special process servers
- ▶ Verification of certified process servers
- ▶ Identification of the judicial circuit and county
- ▶ Visibility into the person who performed each attempt
- ▶ Controls over subcontractors
- ▶ Current certification or appointment records
- ▶ Procedures for assignments crossing county or circuit boundaries

Florida law generally authorizes service by the sheriff, certain special process servers appointed by a sheriff, or certified process servers. The chief judge of each judicial circuit may establish an approved list of certified process servers. [View Florida Statutes § 48.021](#)

Red flag

The vendor cannot identify who will perform the attempts, what authorization that person holds, or whether the authorization applies in the location involved.

What You Should Know Before Moving On: By this point, you should understand whether the vendor has the Florida knowledge, quality controls, server-authorization procedures, and operational discipline needed to handle your work accurately. Do not move forward based only on broad assurances.

What Happens When Something Goes Wrong?

QUESTION 8: Are filings and service instructions reviewed by experienced specialists?

Ask

Which matters receive human review, and what qualifications do the reviewers have?

Listen for clear distinctions among

- ▶ Self-service orders
- ▶ Automated validation
- ▶ Expert review
- ▶ Concierge or end-to-end service

Experienced review should be available for

- ▶ Complex party names
- ▶ Entity defendants
- ▶ Difficult service instructions
- ▶ Rush matters
- ▶ Repeated filing corrections
- ▶ Substituted-service assignments
- ▶ Out-of-state service
- ▶ Unavailable registered agents
- ▶ Corrected returns of service

Red flag

“The platform handles everything automatically.” Automation should support judgment, not eliminate access to it.

QUESTION 9: Who owns escalation when a filing or serve encounters a problem?

Ask

Who becomes responsible when an order cannot proceed as expected?

Listen for

- ▶ A defined escalation path for Portal correction notices
- ▶ Clerk requests
- ▶ Missing documents
- ▶ Inconsistent party names
- ▶ Invalid addresses
- ▶ Restricted access
- ▶ Unavailable registered agents
- ▶ Unclear representative authority
- ▶ Possible avoidance
- ▶ Approaching deadlines
- ▶ Return-of-service errors

The vendor should specify who contacts the firm, how quickly, what information is supplied, and how the matter remains visible until resolved.

+ Strong answer

The order is assigned to a named escalation specialist, and your team receives the attempt details, the identified problem, and the information or direction needed to proceed.

- Weak answer

Customer support will look into it.

QUESTION 10: How will we receive status updates?

? Ask whether their system shows

- ▶ Filing submitted
- ▶ Filing accepted or placed in a correction queue
- ▶ Summons issued
- ▶ Documents released for service
- ▶ Assignment dispatched
- ▶ Attempt dates and outcomes
- ▶ Address or access problems
- ▶ Registered-agent issues
- ▶ Service completed
- ▶ Return of service prepared
- ▶ Return received
- ▶ Return filed
- ▶ Order closed

Determine whether updates are available through a client portal, email alerts, platform integrations, scheduled reports, downloadable matter histories, or APIs.

🚩 Red flag

The portal shows only “open,” “in progress,” or “completed.”

QUESTION 11: Will your team alert us before a matter becomes urgent?

? Ask

Which events generate proactive alerts rather than ordinary status updates?

🔊 Listen for

- ▶ Filing correction or rejection
- ▶ Missing documents
- ▶ Delayed summons issuance
- ▶ No attempt within the expected period
- ▶ Repeated unsuccessful attempts
- ▶ Invalid address
- ▶ Restricted access
- ▶ Registered-agent issue
- ▶ Delayed return of service
- ▶ Approaching deadline
- ▶ Unresolved request for instructions

👁 Watch for

A vendor that reports what already happened but does not identify what now requires action.

QUESTION 12: How quickly can we reach a knowledgeable person?

Ask

What support is available when a routine order becomes a procedural or deadline problem?

Listen for

- ▶ Published support hours
- ▶ Telephone and email access
- ▶ After-hours procedures
- ▶ Emergency escalation
- ▶ Dedicated account management
- ▶ Florida operational expertise
- ▶ Response-time commitments
- ▶ Coverage across time zones

Red flag

The vendor claims broad statewide or national coverage but cannot connect the firm with someone who understands the Florida court, county, circuit, or service issue.

Scenario: Filing Accepted, Service Never Started

The complaint is accepted, but the service team does not receive the issued summons. Several days later, the firm discovers that no service order was created because filing and process serving are handled in separate systems.

What this reveals

- ▶ No automated or controlled handoff
- ▶ No alert when issued documents remain undispatched
- ▶ No single owner for the full workflow
- ▶ Status measured by task completion rather than case progression

What a strong provider would do

Acceptance and summons issuance would trigger document release, service-order creation, deadline transfer, and an exception alert if dispatch did not occur as expected.

What You Should Know Before Moving On: You should know exactly who takes ownership of a problem, how quickly your firm will hear about it, and what information you will receive. A strong provider does not merely report exceptions. It keeps them visible, identifies what is needed, and helps prevent routine problems from becoming deadline emergencies.

Can They Document and Defend the Work?

QUESTION 13: What information appears in the return of service?

Ask

Can we review sample affidavits for each method and defendant type we commonly use?

Listen for

- ▶ Date and time the process came to hand
- ▶ Date and time service occurred
- ▶ Manner of service
- ▶ Name of the person served
- ▶ Representative capacity, when applicable
- ▶ Pleadings and documents delivered
- ▶ Server identity and signature
- ▶ Service address or location
- ▶ Other method-specific facts

[Florida Statutes § 48.21](#) requires the return-of-service form to identify when the process came to hand, when it was served, the manner of service, the person served, any representative capacity, and the pleadings and documents delivered.

Red flag

The vendor relies on GPS, photographs, or portal notes as a substitute for a complete statutory return. Those supporting materials may strengthen the record, but they do not replace the required return-of-service information.

Evidence to request

- ▶ Individual personal-service return
- ▶ Abode-service return
- ▶ Corporation or LLC return
- ▶ Registered-agent service return
- ▶ Public-agency service return
- ▶ Out-of-state return

QUESTION 14: Can we retrieve the complete record later?

? Ask

What remains available after the assignment closes, and how quickly can we retrieve it?

Ask whether the vendor can preserve and retrieve, as applicable:

- ▶ Filed or accepted documents
- ▶ Issued summons
- ▶ Service instructions
- ▶ Every attempt
- ▶ Dates, times, and locations
- ▶ Server notes
- ▶ Recipient information
- ▶ Representative capacity
- ▶ Returns of service
- ▶ Filing confirmations
- ▶ Supporting photographs or location records, when collected
- ▶ Client and vendor communications
- ▶ Corrected versions
- ▶ Invoices

Not every item is required by statute in every matter. Together, however, these records provide a more complete audit trail and make it easier to reconstruct the assignment if service is later questioned.

? Also ask:

- ▶ How long are records retained?
- ▶ Can the firm export a complete matter or portfolio?
- ▶ Are closed records available without contacting support?
- ▶ Do audit logs identify later changes?
- ▶ What happens to records if the firm changes vendors?
- ▶ Can the provider produce authorization records for the server?

+ Strong answer

Your team can download the entire matter history, including documents, attempts, communications, affidavits, and filing confirmations.

- Weak answer

Contact us and we'll see what we can find.

What You Should Know Before Moving On: You should be confident that the vendor can produce a complete and accessible record if service is questioned months or years later. The firm should not have to reconstruct the history from emails, invoices, disconnected portals, and individual recollections.

Will Their Workflow Make Your Team's Job Easier?

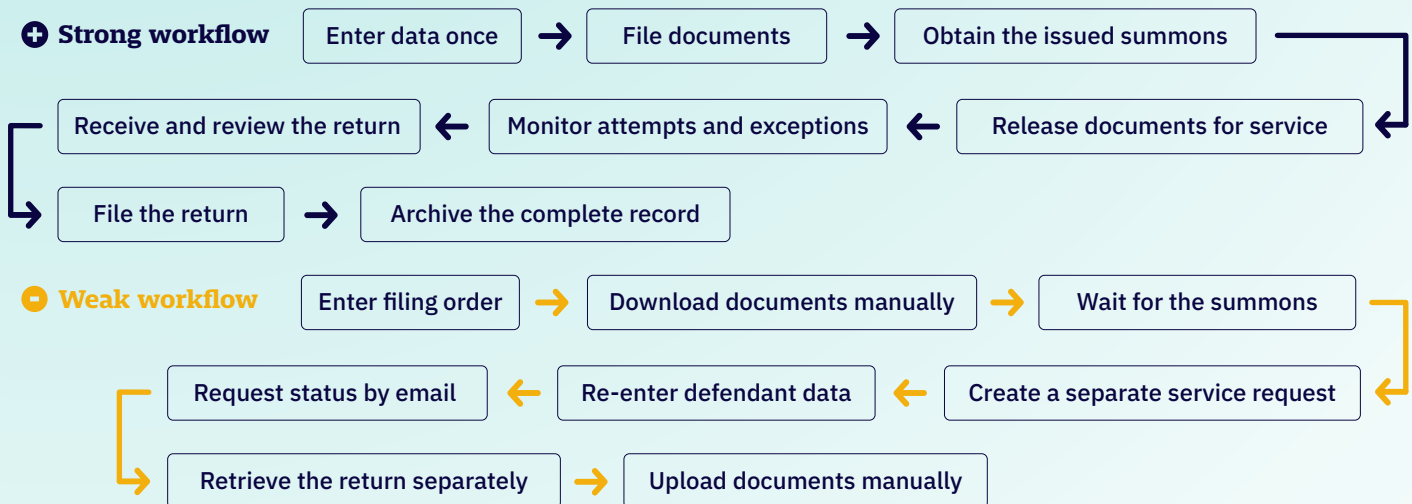
QUESTION 15: Can your workflow support our actual volume, geography, and urgency?

Ask

Can your operation support the work we genuinely perform—not merely the work described in your sales materials?

Listen for

- ▶ All Florida counties and judicial circuits
- ▶ Urban, suburban, and rural assignments
- ▶ Circuit and county court matters
- ▶ Multiple divisions and case types
- ▶ High-volume portfolios
- ▶ Multi-defendant matters
- ▶ Rush assignments
- ▶ Out-of-state defendants
- ▶ Filing-only and serve-only orders
- ▶ Connected filing-and-service workflows
- ▶ Multiple offices and users
- ▶ Sudden volume increases
- ▶ Firmwide reporting
- ▶ Document-management and practice-management integrations
- ▶ Billing and invoice consolidation



Red flag

The vendor claims statewide or nationwide coverage but depends on the firm to coordinate local procedures, server authorization, service providers, and exception follow-up.

What You Should Know Before Making a Decision: The vendor's workflow should remove steps, reduce follow-up, and fit the way your firm actually operates. A provider may be technically capable of completing an order but still be a poor operational fit if its process creates duplicate entry, manual transfers, fragmented status, or additional vendor management.

✓ Final Due-Diligence Checklist

Before selecting a provider, confirm that your team has:

- ▶ Reviewed relevant performance metrics
- ▶ Tested the vendor's portal and status visibility
- ▶ Examined sample Florida returns of service
- ▶ Confirmed process-server authorization procedures
- ▶ Reviewed the escalation path and support hours
- ▶ Tested closed-matter record retrieval
- ▶ Discussed Portal filing and initial-service handoffs
- ▶ Evaluated integrations and reporting
- ▶ Requested comparable client references
- ▶ Compared total administrative impact—not only price

🚩 Vendor Red Flags

- ▶ **No measurable performance.** The vendor relies on broad claims rather than defined results.
- ▶ **No escalation owner.** Problems move between teams without clear accountability.
- ▶ **Portal-only support.** Human review is unavailable when the matter becomes complex.
- ▶ **Generic Florida answers.** The vendor cannot explain county, court, defendant-type, judicial-circuit, or server-authorization differences.
- ▶ **Weak documentation.** Returns are incomplete, supporting records are fragmented, or retrieval is difficult.
- ▶ **Reactive communication.** The firm learns about problems only after deadlines or next steps are affected.
- ▶ **More work for your team.** The vendor creates duplicate entry, manual transfers, repeated status checks, or separate billing processes.

Next Step

The objective is not simply to find a vendor that can complete an order. It is to select a partner whose process gives the firm greater visibility, consistency, and confidence.

Proceed helps Florida law firms evaluate filing and service workflows, identify where operational risk is hiding, and determine what stronger support should look like.

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This checklist provides general operational information and is not legal advice. Requirements may vary by court, county, case type, party, service method, e-filing program, and individual circumstances. Attorneys should review the governing statutes, rules, court orders, and current filing procedures applicable to each matter.



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