How to Place a Document Retrieval Order

Ask us to get copies of documents from a court file, on your own case or on a different case you need for reference or review.

Start here

LOG IN TO THE PORTAL →

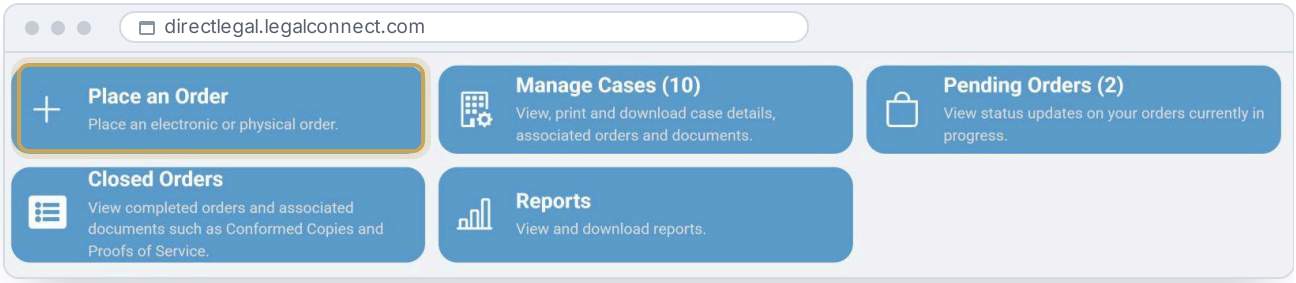
Or go to **directlegal.legalconnect.com** and log in with your email address and password. Use a current version of Chrome, Edge, Firefox or Safari. New to the portal? See our **Creating a New Account** guide.

What you will need

- The case number, if there is one
- The state, county and court of the case
- The names of the parties
- The document names, if you don't need the entire file
- Your billing code or client matter number, if your firm uses one

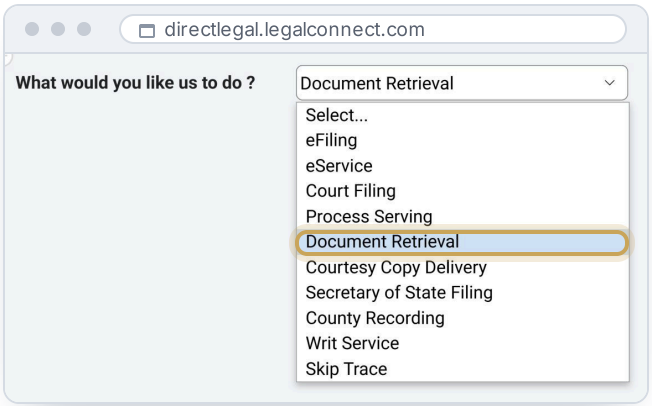
1 Click Place an Order

Log in to your account. On your dashboard, click **Place an Order**.



2 Choose Document Retrieval

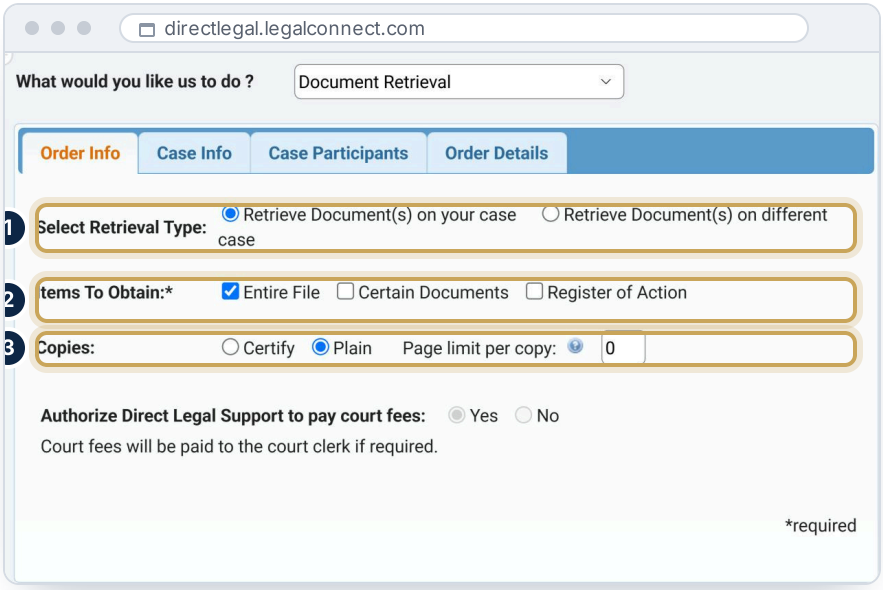
In **What would you like us to do?**, select **Document Retrieval**.



3 Choose what to retrieve

On the **Order Info** tab, fill in these choices:

1. **Select Retrieval Type.** Choose **Retrieve Document(s) on your case** for a case you are working on, for example to get conformed copies or minutes of a hearing. Choose **Retrieve Document(s) on different case** for a case that isn't yours, for example one you need for reference or case review.
2. **Items To Obtain.** Check **Entire File**, **Certain Documents** or **Register of Action**. If you check **Certain Documents**, a text box appears where you can list the documents you need.
3. **Copies.** Choose **Certify** for certified copies or **Plain** for plain copies. If you want to limit the number of pages, enter it in **Page limit per copy**.



If the court charges fees, they are paid to the court clerk. Click **Next**.

> **Different case:** If you are retrieving documents on a different case, enter the case information the form asks for and choose the items you want.

4 Enter the case information

On the **Case Info** tab, type the **Case Number** and press Enter (1). If there is no case number, check **Check here if you do not have a Case Number**. Then choose the **State** and **County** of the case (2) and the **Jurisdiction** (3). Type part of the courthouse name in the box at the top of the Jurisdiction list to find it. Click **Next**.



5 Add the case participants

Click **Add Party(s)**. In the Add Party box, enter the name of each party involved, their role, and whether they are your lead client. When you are done, click **Next**.

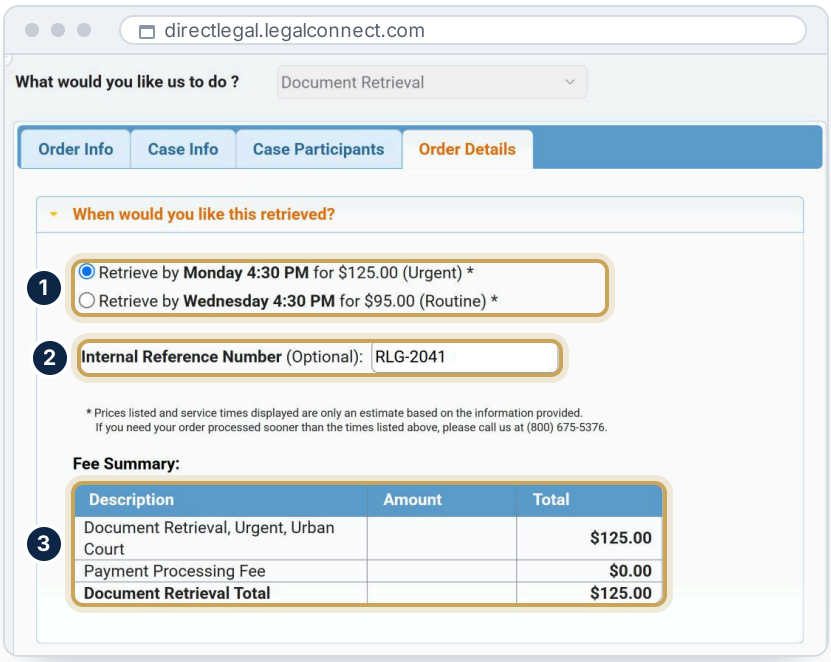


> **Billing code:** If you mark a party as your lead client, you may be asked for a **Billing Code**. This is your firm's internal billing or client matter number for the case.

6 Choose when it is retrieved

On the **Order Details** tab, choose a service level under **When would you like this retrieved?** (1). If your firm tracks orders with its own number, enter it in **Internal Reference Number** (2).

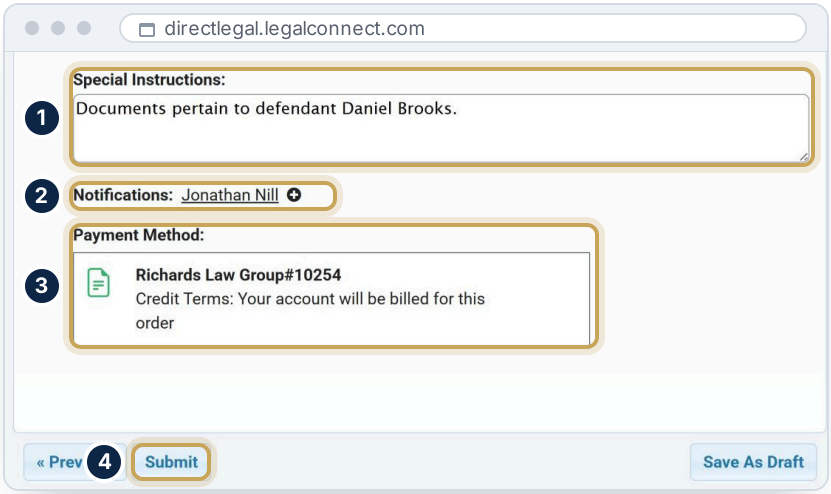
The **Fee Summary** shows our retrieval fee and your order total (3).



> **Times are estimates:** The service times and prices shown are estimates based on the information you entered.

7 Add instructions and submit

Type any **Special Instructions**, such as the name of the party the documents pertain to (1). **Notifications** shows who gets status updates on this order (2), and **Payment Method** shows how the order will be paid (3). When you are ready, click **Submit** (4).

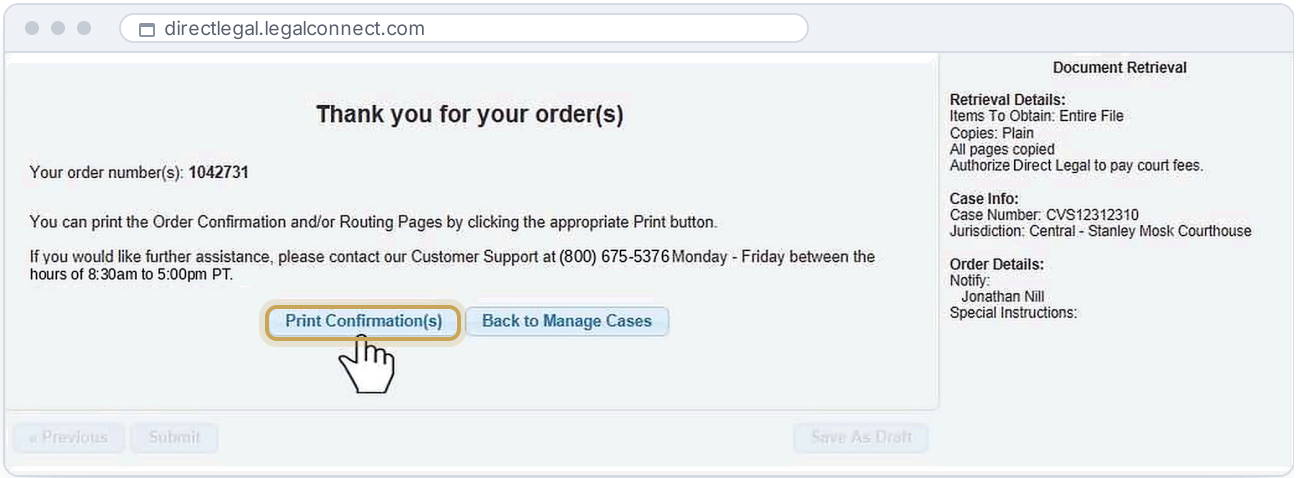




Notifications: You are listed by default. To add others, click the **+** icon next to the name, open the list and check each person who should get status updates.

8 Get your confirmation

A confirmation appears with your order number and a summary of the order. Click **Print Confirmation(s)** to print the order confirmation or routing pages.



After you order

- Follow your order under **Pending Orders** on your dashboard
- Find completed orders and their documents under **Closed Orders**

Good to know

Need it sooner than the times shown? Call us at (800) 675-5376 before you place the order.

Questions? We're here to help.

Call our Litigation Division Monday to Friday, 8:30 a.m. to 5:00 p.m. Pacific, or email info@directlegal.com. Ready to order? Log in to the portal.

(800) 675-5376