How to Place a Skip Trace Order

Ask us to locate a party or witness in your case. Tell us who to look for and where they were last known to be, and upload a court document from the case.

Start here

LOG IN TO THE PORTAL →

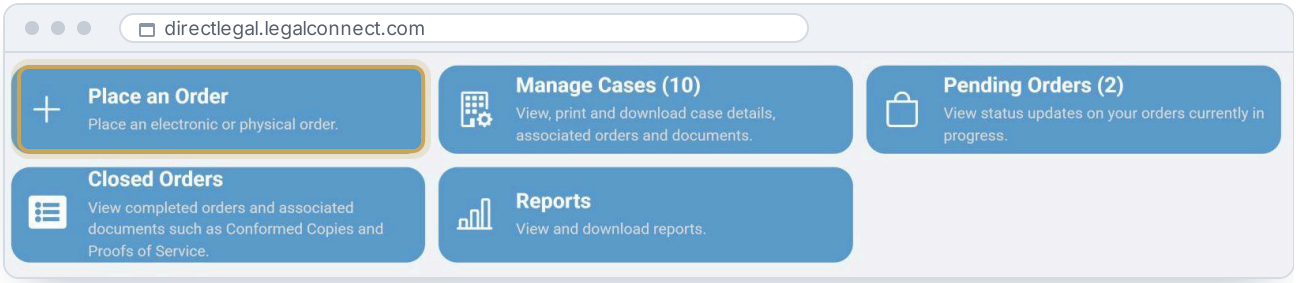
Or go to **directlegal.legalconnect.com** and log in with your email address and password. Use a current version of Chrome, Edge, Firefox or Safari. New to the portal? See our **Creating a New Account** guide.

What you will need

- The name, gender and last known address of the person to locate
- Any other details that can help, such as a date of birth
- The case number, state, county and court
- A court document from the case to upload
- Your billing code or client matter number, if your firm uses one

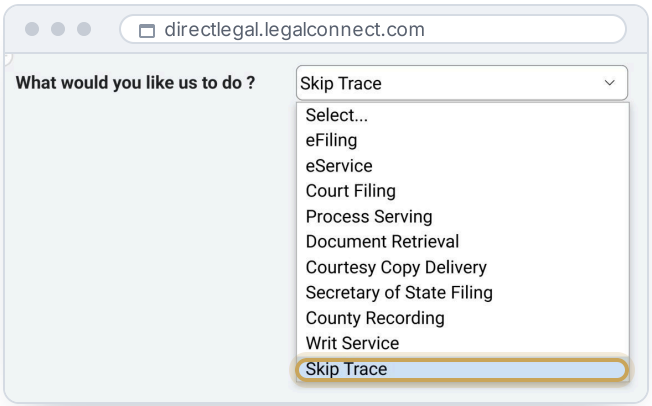
1 Click Place an Order

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



2 Choose Skip Trace

In **What would you like us to do?**, select **Skip Trace**.

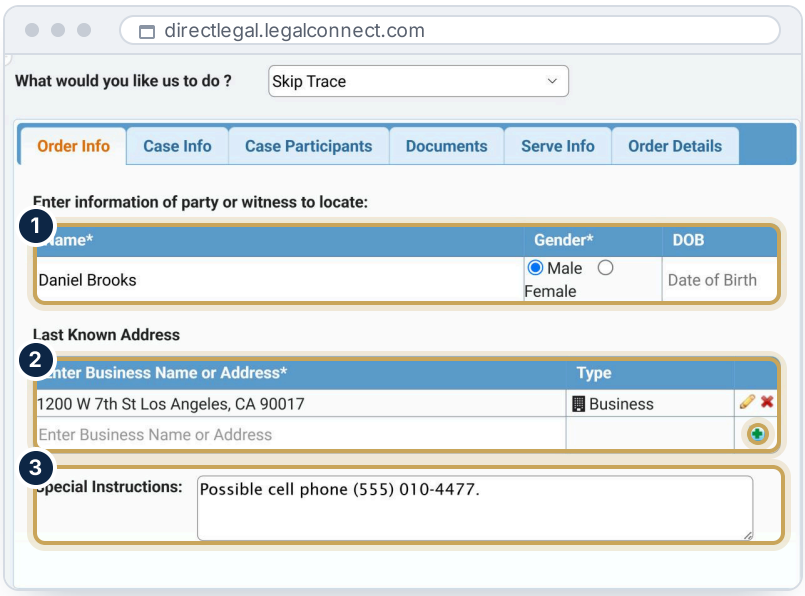


3 Tell us who to locate

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

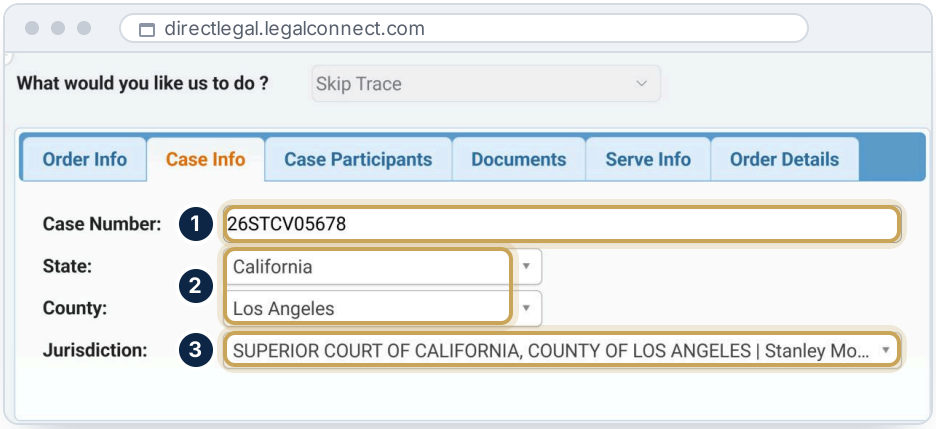
1. The **Name** and **Gender** of the party or witness to locate, and their **DOB** (date of birth) if you have it.
2. Their **Last Known Address**. Choose the address from the list as you type, click **OK** if you are asked for a unit or suite number, then click the green **+** button to add it.
3. Any other details that can help in **Special Instructions**, such as phone numbers, a driver's license number or a maiden name.

Click **Next**.



4 Enter the case information

On the **Case Info** tab, type the **Case Number** and press Enter (1). Then choose the **State** and **County** (2) and the **Jurisdiction**, the court where the case is filed (3). You can type in the box at the top of a list to find your choice. The **Case Participants** tab opens when you choose the jurisdiction.



5 Add the case participants

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

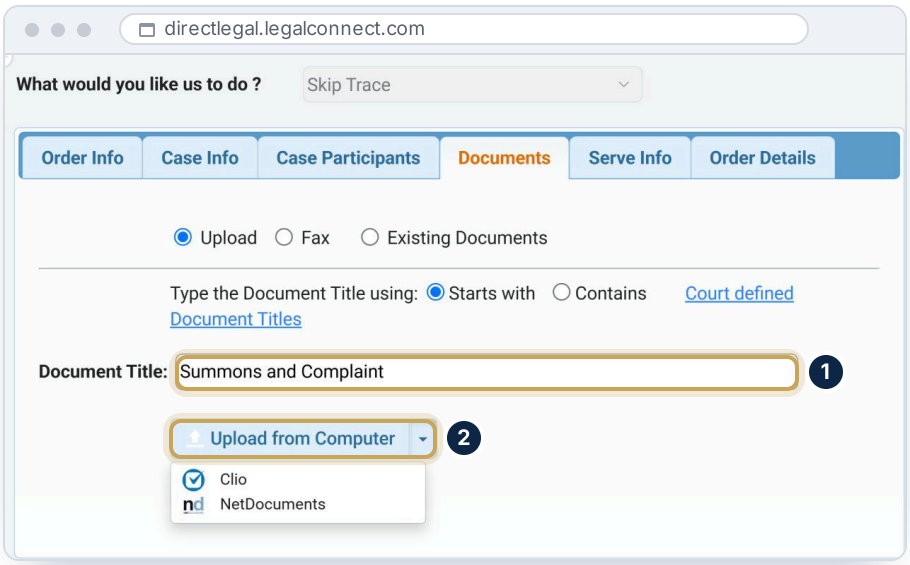


> **Billing code:** If you mark a party as your lead client, you may be asked for a **Billing Code**. This is your firm's internal billing or client matter number for the case.

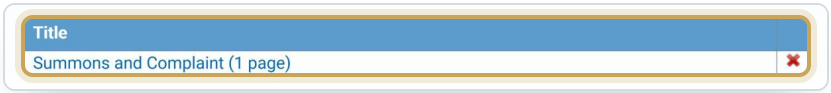
6 Upload a court document

> **Required:** You must upload a court document that shows there is a case. There must also be a legitimate reason for the skip trace on this person.

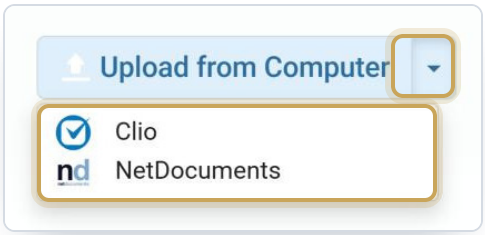
On the **Documents** tab, start typing the **Document Title** and choose it from the list (1). Choose **Starts with** or **Contains** to change how the list is searched. If your title isn't listed, type your own. Then click **Upload from Computer** and choose the file (2).



Each document you attach is listed under **Title**. Click **Next**.



6A Or upload from Clio or NetDocuments

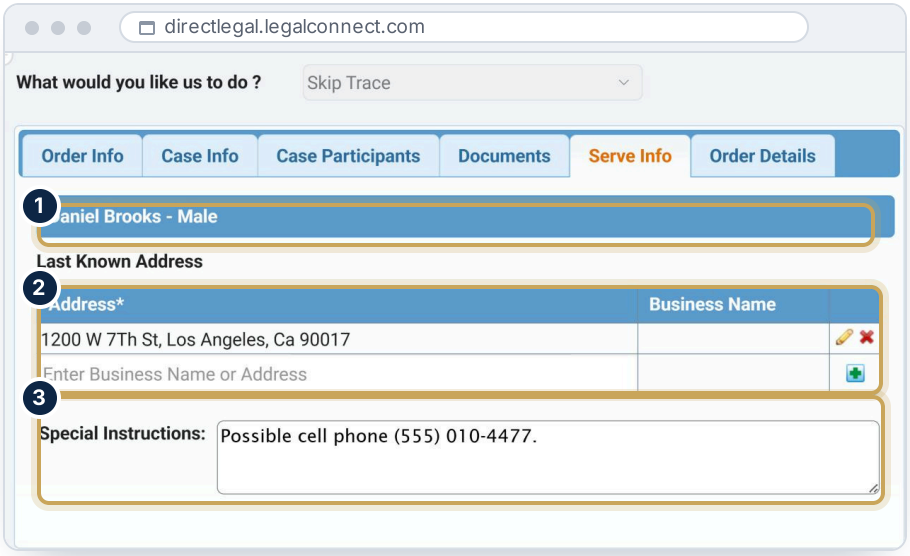


If your firm keeps its files in **Clio** or **NetDocuments**, you can attach the document from there instead of from your computer. Click the arrow next to **Upload from Computer** and choose **Clio** or **NetDocuments**. Sign in if asked, then pick the file.

For the full steps, see Using Clio with Direct Legal Support or Using NetDocuments with Direct Legal Support.

7 Check the last known address

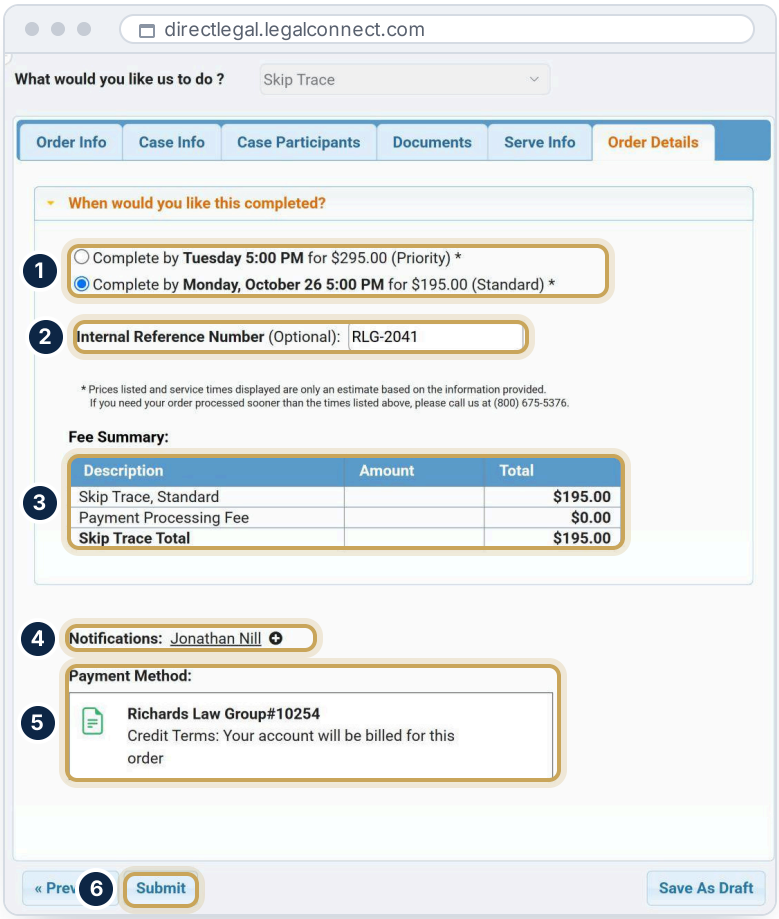
The **Serve Info** tab shows the person to locate (1) and the **Last Known Address** you entered (2). Check that it is correct, add any **Special Instructions** (3) and click **Next**.



8 Choose your service level and submit

On the **Order Details** tab, choose a service level under **When would you like this completed?** (1). If your firm tracks orders with its own number, enter it in **Internal Reference Number** (2). The **Fee Summary** shows our fee and your order total (3).

Notifications shows who gets status updates on this order (4), and **Payment Method** shows how the order will be paid (5). When you are ready, click **Submit** (6). You will receive a confirmation email.

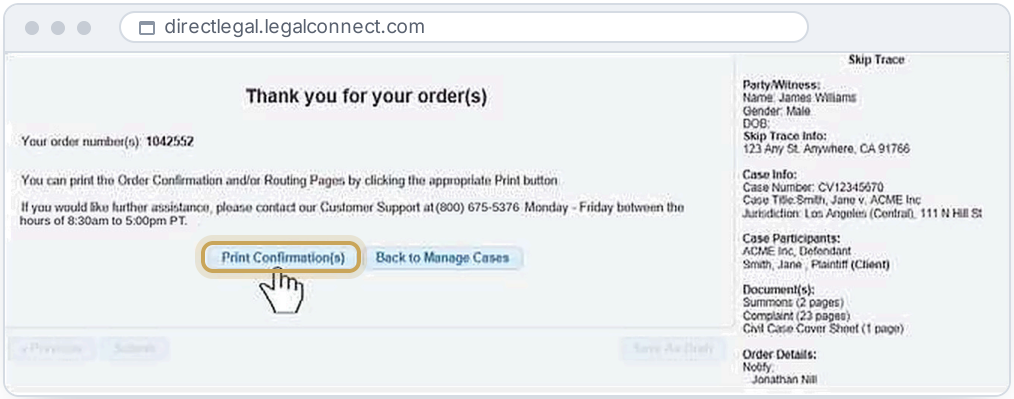




Notifications: You are listed by default. To add others, click the **+** icon next to the name, open the list and check each person who should get status updates.

9 Get your confirmation

An order number appears to confirm that your order was placed, with a summary of the order. Click **Print Confirmation(s)** to keep a record of your order.



After you order

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

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