

# Forms + Filing Basics

Use this short guide when the live problem is the paper itself: what it is, what to check before filing, what to keep in your own set, and where to route next if you still do not understand it.

## Use this page fast

- 1 Identify the paper before you fill or file it.
- 2 Build your own carry set before you hand anything over.
- 3 Use official doors for the live filing lane.
- 4 Capture what happened after you file.

## Before anything

- 1 Label the document in plain language for yourself first.
- 2 Find the date that controls the paper.
- 3 Notice whether the paper asks for a response, signature, attachment, or simply needs to be kept.
- 4 Keep the paper, your notes, and any next-step date in your own copy set.

## Work the paper

- 1 Start with names, caption, and case or docket information.
- 2 Find the few lines that say what is being requested or ordered.
- 3 Notice every signature, worksheet, or attachment reference before assuming the packet is complete.
- 4 Write down the 3 questions you still need answered.

## Filing day basics

- 1 Keep one clean set for yourself.
- 2 Carry the short note that explains the packet to you.
- 3 Write down the next date before the day is over.

