

# DELAWARE COUNTY, PA E-FILE USER GUIDE

## E-FILING USER GUIDE

# CONTENTS

E-Filing User Guide	1
About this document	3
Intended readership	3
In this guide	3
Delaware County Contact Information	3
Chapter 1 Electronic Filing	5
C-Track CMS E-Filing functionality	5
1.1 E-File Overview and Registration	5
1.2 User Administration and Add Support Staff	13
1.3 Navigation, Dashboard Widgets and Switch User Association	16
1.4 E-Filing Notifications	22
1.5 Legal Organization Administration	25
1.6 Matter Numbers and Matter Sharing	36
1.7 Create a New Case E-Filing	42
1.8 Submit an E-Filing on an existing case	61
1.9 Support Staff Completes a Draft Filing	70

## ABOUT THIS DOCUMENT

### INTENDED READERSHIP

This document serves as a guide to registering and using the Delaware County C-Track E-Filing application.

### IN THIS GUIDE

The aim of the guide is to provide step-by step process instruction for users with appropriate privileges to create, edit and submit electronic case filings from a remote computer to the Office of Judicial Support (OJS) and to manage their C-Track E-Filing account. The guide includes Legal Organization Administration functionality to add and remove authorized E-filers to Legal Organizations (Law Firms) and to enable Firm Matter Number sharing within a Legal Organization.

### DELWARE COUNTY CONTACT INFORMATION

Office of Judicial Support E-mail: **DelcoEfile@co.delaware.pa.us**

Office of Judicial Support Phone: **610-891-4386**

## **ATTENTION**

### **SERVICE OF ORIGINAL PROCESS**

IF YOU ARE FILING A WRIT OR COMPLAINT WHICH IS CONSIDERED ORIGINAL PROCESS UNDER PA RULE OF CIVIL PROCEDURE 400 AND REQUIRES SERVICE BY THE SHERIFF, PLEASE BE ADVISED THE DELAWARE COUNTY OFFICE OF JUDICIAL SUPPORT (“OJS”) WILL NOT ELECTRONICALLY TRANSFER YOUR PLEADING TO THE SHERIFF’S OFFICE FOR SERVICE.

IF YOU RECEIVE A NOTICE FROM OJS THAT YOUR FILING HAS BEEN APPROVED AND DOCKETED, **YOU STILL MUST MAKE ARRANGEMENTS WITH THE SHERIFF’S OFFICE TO HAVE ORIGINAL PROCESS SERVED** PURSUANT TO THE PENNSYLVANIA CIVIL PROCEDURE RULES, PART 1: SERVICE OF ORIGINAL PROCESS, SUB-PART A: SERVICE GENERALLY Pa.R.C.P 400 – 405 and/or SUB-PART B: SERVICE IN PARTICULAR ACTIONS Pa.R.C.P. 410-412 ; SUB-PART C: SERVICE UPON PARTICULAR PARTIES Pa.R.C.P 420-425; SUB-PART D SERVICE PURSUANT TO SPECIAL ORDER OF COURT Pa.R.C.P 430; PART II, SERVICE OF LEGAL PAPERS OTHER THAN ORIGINAL PROCESS Pa.R.C.P 440-44

## CHAPTER 1 ELECTRONIC FILING

### C-TRACK CMS E-FILING FUNCTIONALITY

#### 1.1 E-File Overview and Registration

Electronic Filing offers the opportunity to open a new case filing or electronically file and transmit documents to the Court for an existing case, using a remote computer. E-Filing requires the completion of a registration form and may or may not require the successful completion of a test, depending upon the business process of the Court(s) to which you E-File. Additionally, you need an active email account to complete the registration process. You submit the registration and receive an email which provides a link to access the C-Track E-Filing web site.

For Efilers who are attorneys, you may have a legal organization, such as a law firm, to which you can associate an E-Filing account. Legal Organizations are useful for instances where another registered user submits filings on your behalf or where attorneys or authorized E-Filers may need to view filings submitted by other E-Filers of the same Legal Organization. Legal Organizations can use Firm Matter Numbers, a unique number internal to their organization, to allow authorized users access to filing information based upon those numbers. When a registered E-Filer is associated to a Legal Organization, the user can switch associations from their personal E-File account to the Legal Organization to which they are associated. Filings submitted when the E-Filer is associating filings to the Legal Organization can be saved as a draft and completed by other E-Filers of the Legal Organization who have authority through the Firm Matter Number associated to the filing. Support Staff can also be included as Legal Organization members. Attorneys can associate Support Staff through the User Association screen. Support Staff are able to file on behalf of authorized Efiler permission but, do not need to have Firm Matter Number permission to file.

You may access the E-File Registration / Log In screen from another web site, such as a State or County site, which directs you to the web location or Universal Resource Location (URL) for C-Track E-Filing.

➤ **NOTE:** To review the Terms and Conditions for using the E-Filing site click the **E-Filing Terms & Conditions** link on the **Log In** screen.

The **E-File User Access** image below demonstrates security constraints E-File users face when included and not included on the E-File User Access List for a given case. The E-File User Access List is a list of E-File users that belong to a case on Delaware County's CMS application. To gain access to the List, a user must file onto a case and have it accepted/docketed by OJS. Once docketed, the E-File User will be added to the E-File User Access List.

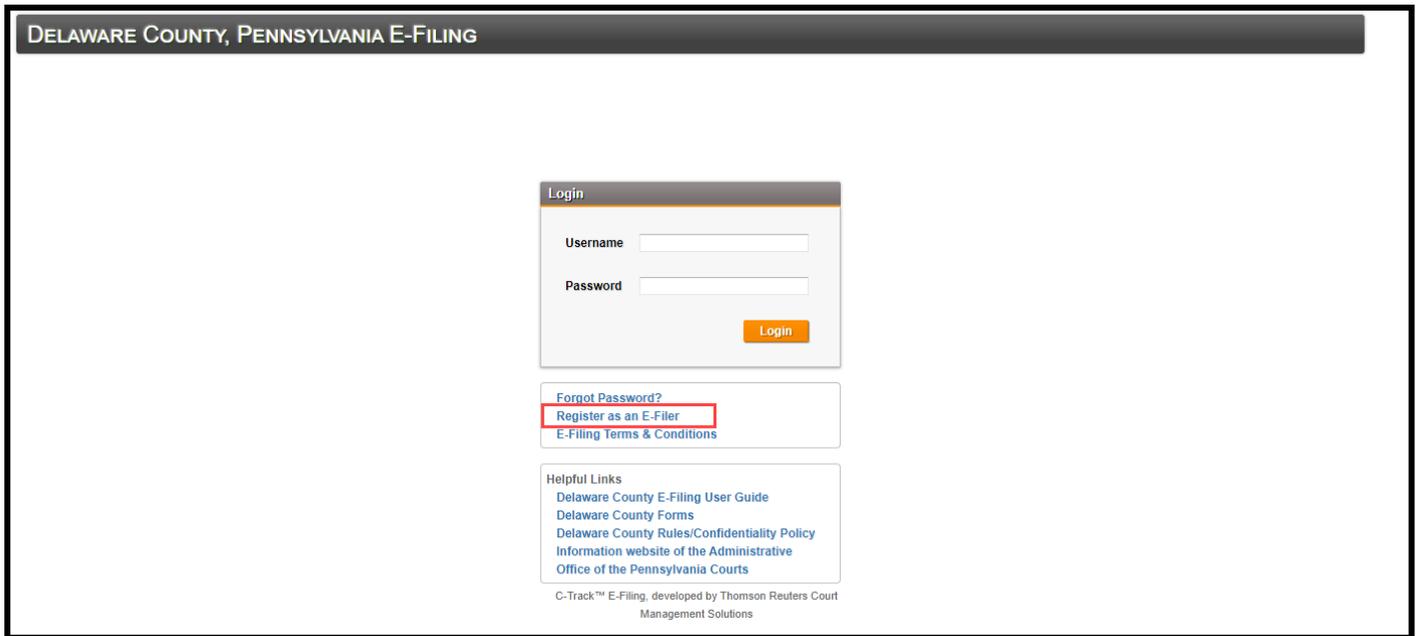
Users within the same Law Firm can also gain access to the E-File User Access List if they are a Support Staff member supporting an Attorney who already belongs to the List or having an Attorney who belongs to the list *share* the Firm Matter Number with another Attorney within the Law Firm.

The image below demonstrates the functionality of the E-File User Access List relative to searching and filing on a case based on the case being a public or confidential record.

		Public Case	Confidential Case
User Not on EF User Access List	Search / Access Case	✘	✘
	E-File into Case	✔	✘
User on EF User Access List	Search / Access Case	✔	✔
	E-File into Case	✔	✔

In this example, we register as an e-filer.

1. From **E-File Registration / Log In** screen, click **Register as an E-Filer**.



**Fig. 1.1: E-File Registration / Log In screen**

The **E-File Registration** screen appears.

**C-TRACK E-FILING**

**Information**

Please enter your information below to begin the E-File Registration process. Your username must not already be in use by someone else in the E-Filing system. Once you have submitted this information, check the Primary Email account you provided when registering. Use the information in the email to verify your E-File account.

**E-File Registration**

**TYPE**

Type\* ?

**USER INFORMATION**

Prefix  
Last Name\*  
First Name\*  
Middle Name  
Suffix

Username\*  
Password\*  
Confirm Password\*

**CONTACT**

Primary E-mail\* ?  
Add Contact

**ADDRESS**

Address Type ? Mailing  
Address Line 1\*  
Address Line 2  
Address Line 3  
Address Line 4  
Country: United States  
City\*  
State\* PA  
Zip Code

**LEGAL ORGANIZATION ASSOCIATION**

Legal Organization Name	Role	E-mail	Status
No records were found.			

Add Legal Organization

**VERIFICATION**

I'm not a robot 

**TERMS AND CONDITIONS**

I agree to the [terms and conditions](#).

**Next**

C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions

**Fig. 1.2: E-File Registration screen**

The **E-File Registration** screen has seven containers.

In the **Type** container:

1. Select the Account **Type**.

If you are an attorney registered with the Bar, select the Registered Representer option. The **Attorney Bar ID** field appears.

**E-File Registration**

**TYPE**

Type\* ? Registered Representer Attorney Bar ID\*

**Fig. 1.3: Registration account Type field selection of Registered Representer**

In the **User Information** container:

2. Enter a **User Name**.
3. Enter a **Last Name**.
4. Enter a **First Name**.
5. Enter a **Password**.
6. **Confirm Password**.

In the **Contact** container:

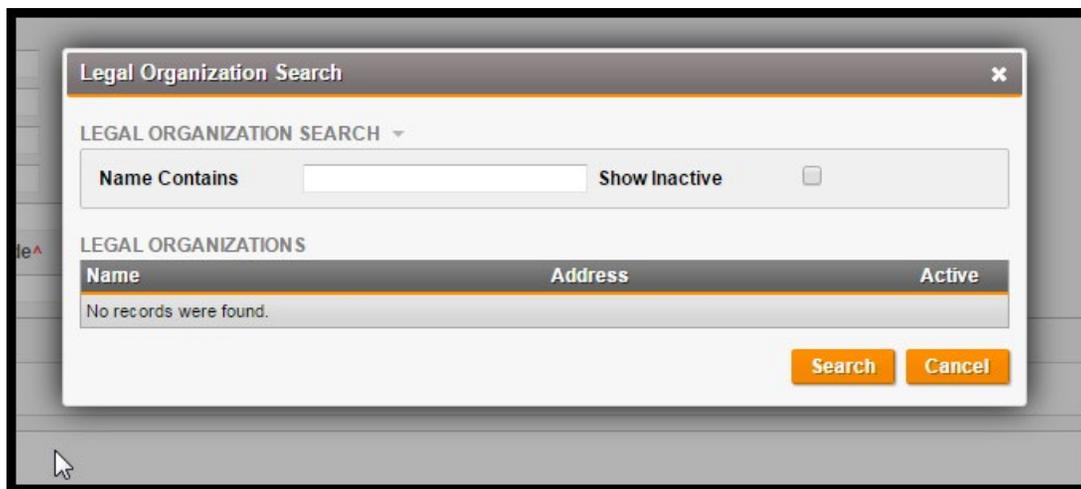
7. Enter a **Primary E-mail**.
8. Click **Add Contact** to enter additional email addresses, as needed.

In the **Address** container:

9. Select the **Address Type**.
10. Enter **Address Line 1**.
11. Enter **City**.
12. Select **State**.
13. Enter **Zip Code**.

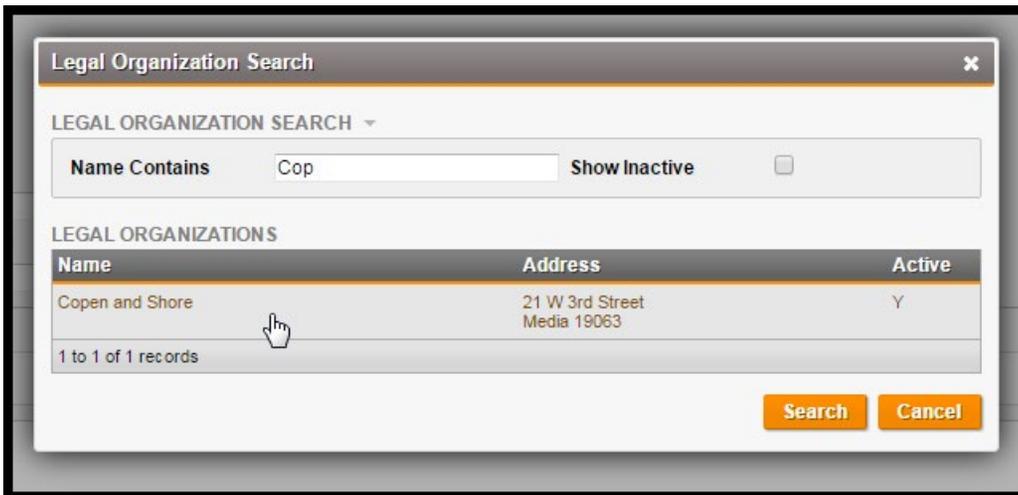
14. If you are associating your registration with a Legal Organization, such as a registered Law Firm, click **Add Legal Organization**.

The **Legal Organization Search** window appears.



**Fig. 1.4: Legal Organization Search** window

15. Enter search criteria.
16. Click **Search**.

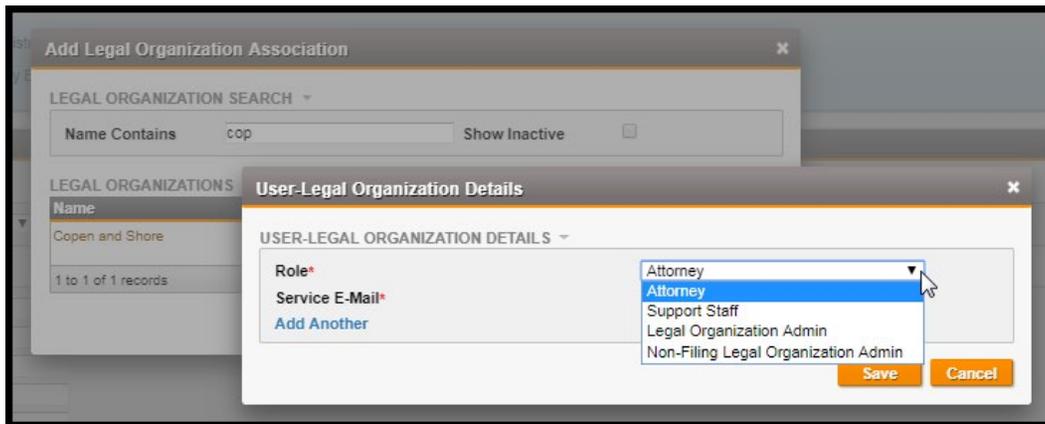


**Fig. 1.5: Legal Organization Search** window – search results returned

➤ **NOTE:** If the Legal Organization to which you belong is not returned in a search, you must contact OJS.

17. Click the line item **Name** of the Legal Organization to which you are associating your E-Filer registration, if applicable.

The **User - Legal Organization Details** window appears.



**Fig. 1.6: Legal Organization Search** window – Organization Details

Here, your Roles determines what functions you can access in E-File and for your Court are defined as:

**Attorney** - selected by users with a valid Bar ID who use the application to submit E-Filing on new and existing cases

**Support Staff** – selected by users without a Bar ID who can submit E-filings on behalf of Attorney's

**Legal Organization Admin** - selected by users with a valid Bar ID who use the application to submit E-Filing on new and existing cases as well as add and remove user access for other e-filers of the organization.

**Non-Filing Legal Organization Admin** - selected by users who do not submit e-

filing themselves or on behalf of anyone else. This role lets users add and remove user access for other e-filers of the organization.

18. Select a **Role**.
19. Enter a **Service Email**.
20. Click **Add Another** to enter additional email accounts associated to your registration and the Legal Organization, as needed. If you add a support staff email address, that individual is required to complete the E-Filing Registration and associate to your account through the Legal Organization functionality.
21. Click **Save**.

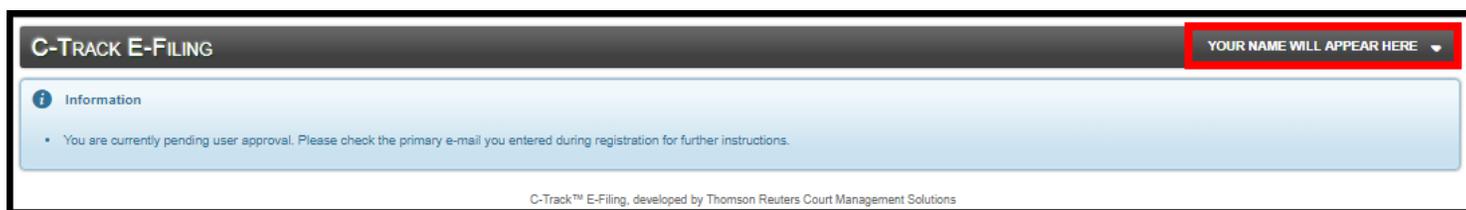
In the **Verification** container:

22. Enter Verification from the Captcha container.

In the **Terms and Conditions** container:

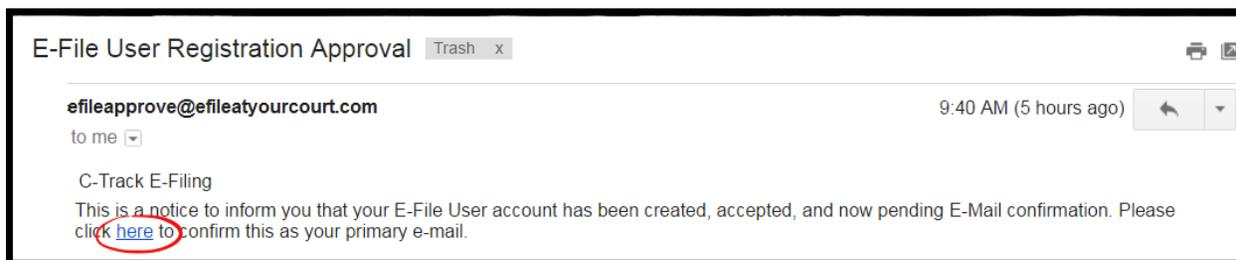
23. Click the **I agree** check box.
24. Click **Next**.

An **Information** message appears and directs you to check your primary email to complete registration.



**Fig. 1.7: Information message**

25. Log into the email account that you entered on the Registration form.
26. Open the email from the E-File site.
27. Click the link provided in the email. The link will appear similar to the figure below.



**Fig. 1.8: C-Track E-Filing Email example**

A Browser window opens and navigates to a secure **C-Track E-Filing Login** screen.

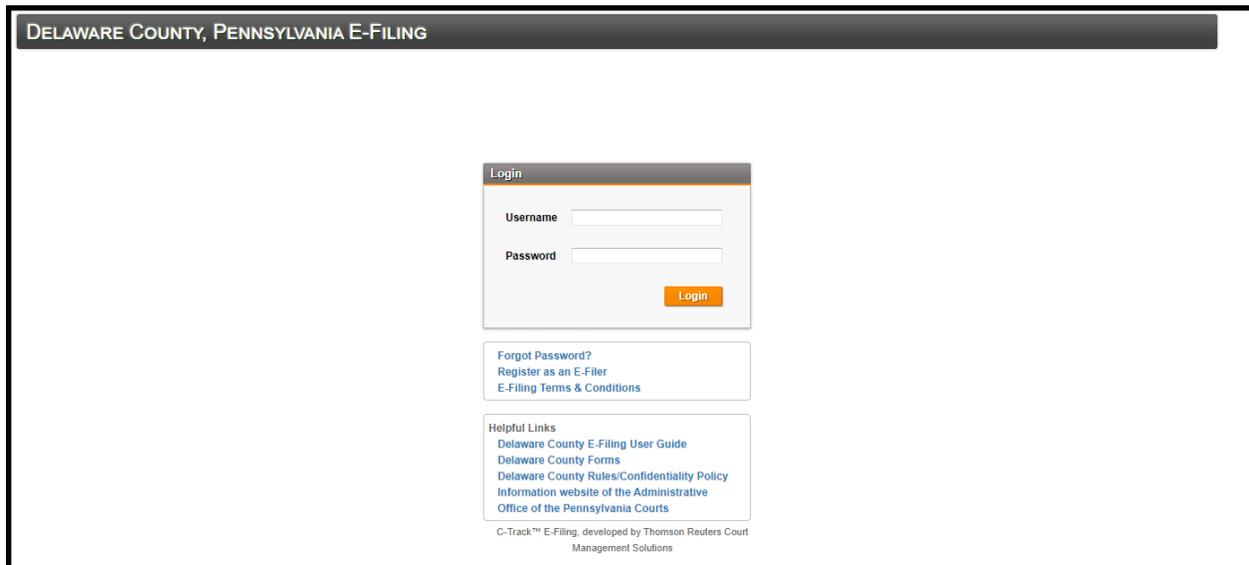


Fig. 1.9: C-Track E-Filing Login screen

- 28. Enter **Username**.
- 29. Enter **Password**.
- 30. Click **Login**.

Please see the **Helpful Links** to access Delaware County Forms, Rules and AOPC information.

The **C-Track E-Filing Home** screen appears and your registered first and last name display in the top right header of the Home screen banner.



Fig. 1.10: C-Track E-Filing Login screen

- 31. Should you forget your password, click the **Forgot Password?** link on the **C-Track E-Filing** screen.

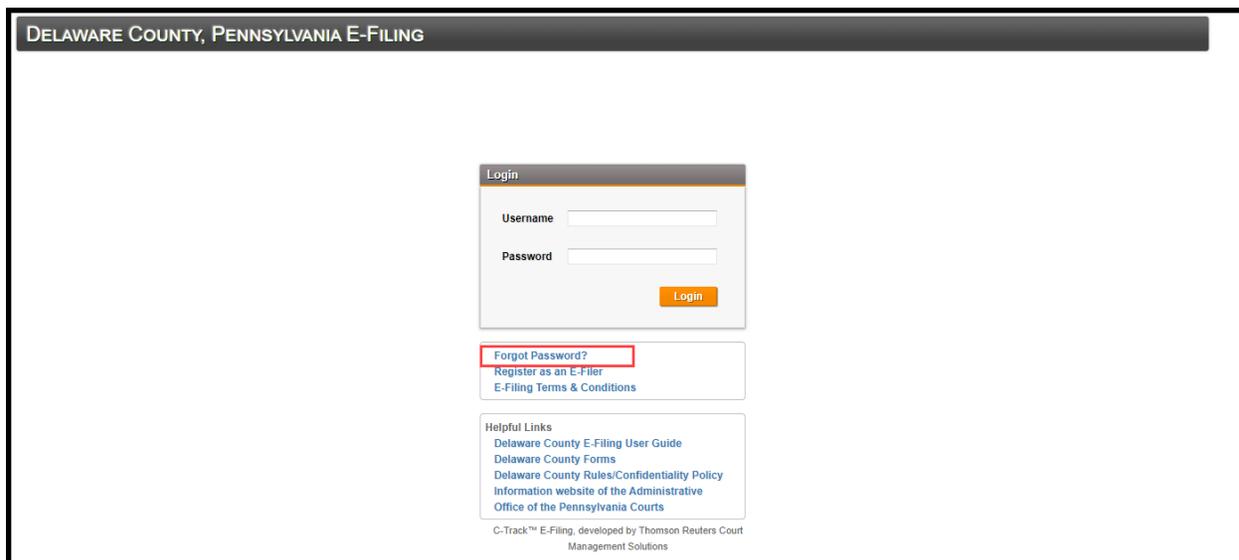
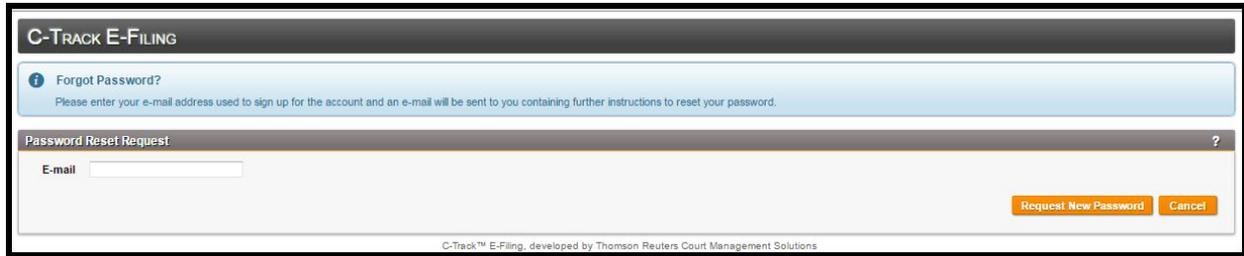


Fig. 1.11: C-Track E-Filing Login screen – **Forgot Password?**

The **Forgot Password** Information message and **Password Reset Request** container appear.



The screenshot shows a web interface for C-Track E-Filing. At the top, there is a dark header with the text "C-TRACK E-FILING". Below the header, there is a light blue information box with a question mark icon and the text "Forgot Password?" followed by "Please enter your e-mail address used to sign up for the account and an e-mail will be sent to you containing further instructions to reset your password." Below this is a "Password Reset Request" container with a question mark icon. Inside this container, there is an "E-mail" label followed by a text input field. At the bottom right of the container, there are two orange buttons: "Request New Password" and "Cancel". At the very bottom of the page, there is a small copyright notice: "C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions".

**Fig. 1.12: Password Reset Request** container

32. Enter the email address you provided on the Registration form.
33. Click **Request New Password**.

An email is sent to the email account on file. Follow the instructions in the email to reset your password.

## 1.2 User Administration and Add Support Staff

The **User Administration** screen lets you update contact information, change your E-Filing password and add other authorized E-File users, such as support staff of your Legal Organization, to your User Account. When you add Support Staff to your User Account, you are creating an association which authorizes the staff to create and complete electronic filings on your behalf.

Access to the **User Administration** screen is available through the personal or Legal Organization account association.

1. From any screen in the **C-Track E-Filing** application, select the down arrow icon  to the right of your Username in the top right menu bar.

The **User Account** menu appears.



**Fig. 1.13: User Account** menu exposed

➤ **NOTE:** In addition to clicking the links in the **User Account** menu, each screen can be accessed through the keyboard shortcut for each option.

<b>My Account</b>	<b>Ctrl + \, A</b>
<b>My Organization</b>	<b>Ctrl + \, O</b>
<b>Switch Association</b>	<b>Ctrl + \, C</b>
<b>My Subscriptions</b>	<b>Ctrl + \, S</b>
<b>Logout</b>	<b>Ctrl + \, L</b>

Additionally, you can access a shortcuts menu from any screen using the keyboard shortcut **Ctrl + \**.

2. Select the **My Account** link.

The **User Administration** screen appears.

**C-TRACK E-FILING** Thea J Ford

**User Administration**

TYPE -  
 Type\* Registered Representer Attorney Bar ID 3211955

USER INFORMATION -  
 Last Name\* Ford Prefix  
 First Name\* Thea Notification Type All  
 Middle Name J Old Password\*  
 Suffix New Password\*  
 Confirm Password\*

CONTACT -  
 Primary E-mail\* nanowiz+TFord@gmail.com  
 Add Contact

ADDRESS -  
 Mailing  
 98 E Emerald St  
 Media PA 19063

Associated Legal Organizations Deactivate Account Save

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**Fig. 1.14: User Administration screen**

The **User Administration** screen has six containers. The information is initially collected through the Registration process you completed. You can update changes to your **User Information**, and change your **Password**, add and edit **Email** contact information.

**Legal Organization Association** information is not editable by you but, is controlled by the authorized Legal Organization Administrator for your Legal Organization or by the Court to which you are e-filing, depending upon how the Court chose to implement the E-Filing system.

If you need to update Mailing address information, contact your Legal Organization Administrator.

The **Associated Legal Organizations** button lets you review Legal Organization details that exist for your User ID, such as support staff, that are registered C-Track E-Filers associated to you and your Legal Organization.

The **Deactivate Account** button lets you confirm the inactivation of your E-Filing account.

The **Save** button updates any changes to your Account information.

3. Click the **Associated Legal Organizations** button at the bottom left of the **User Administration** screen.

The **Manage Associated Legal Organizations** screen appears.

**C-TRACK E-FILING** Thea J Ford

**Manage Associated Legal Organizations**

USER DETAILS -  
 User Name TFord Name Thea J Ford  
 Primary E-mail TFord@copenshore.com Attorney Bar ID 3211955

LEGAL ORGANIZATION ASSOCIATION

Legal Organization Name	Role	E-mail	Status	Support Staff
Copen and Shore	Attorney	TFord@copenshore.com	Approved	Lia Domico

Add Legal Organization

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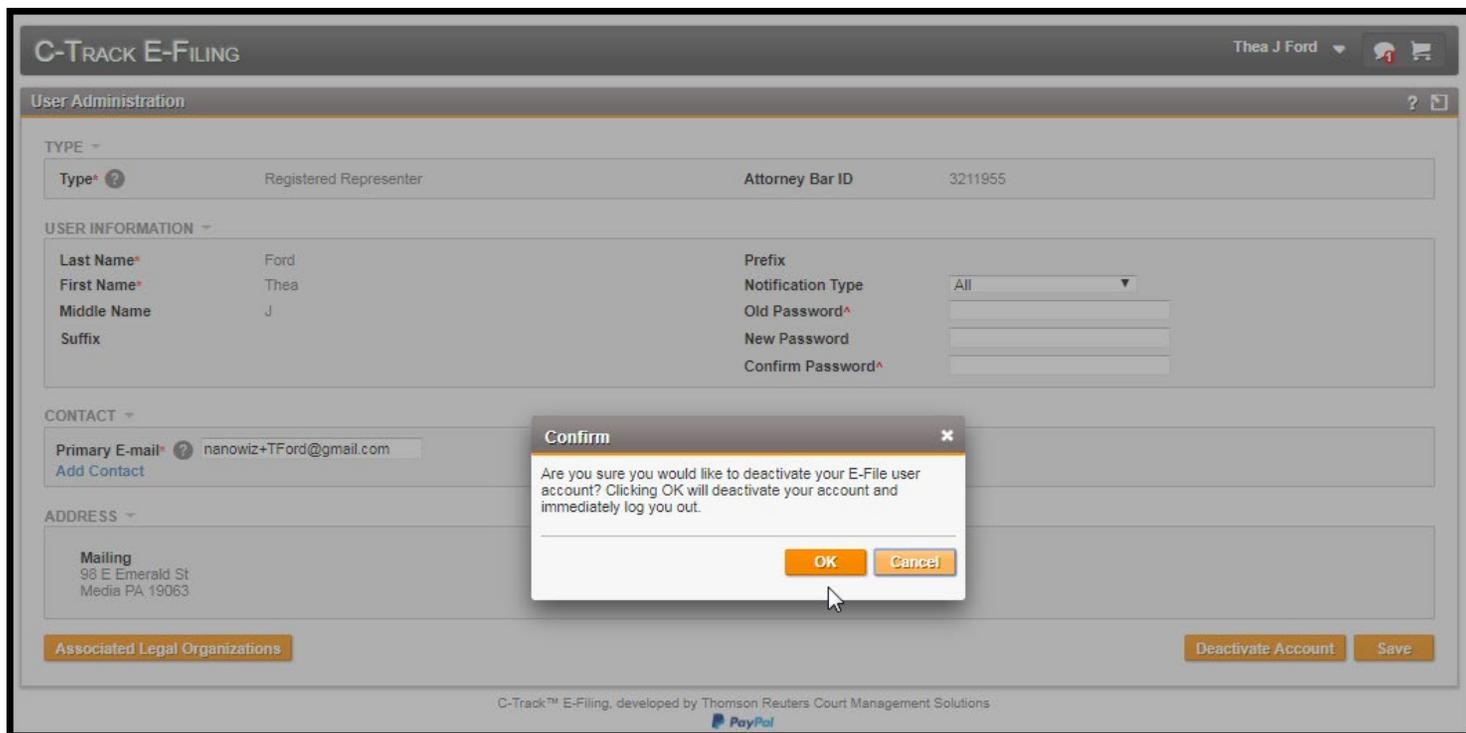
**Fig. 1.15: Manage Associated Legal Organizations screen**

The **Manage Associated Legal Organizations** screen shows your relationship to the Legal Organization. The **Add Legal Organization** link opens the **Add Legal Organization Association** window which you use to search for other Legal Organizations that are registered with the Court.

➤ **NOTE:** If you are associated to more than one Legal Organization but you do not find them using the **Add Legal Organization Association** window search, contact the Court for more information.

4. Click **Ctrl + \, A** to return to the **User Administration** screen.
5. Click **Deactivate Account**.

The **Confirm** window appears.



**Fig. 1.16: Confirm window**

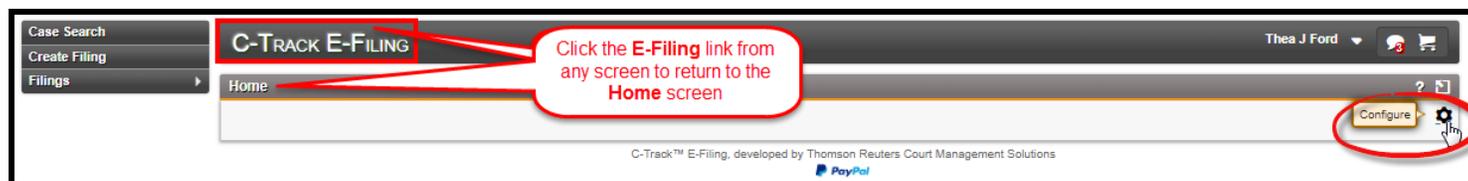
If you choose to deactivate your account, it becomes Inactive. The Court Administrator for the Court in which you E-File must be contacted to reactivate your account.

6. Click **Cancel**.

### 1.3 Navigation, Dashboard Widgets and Switch User Association

In this section we review E-File navigation, the **Home** screen appearance and the filing queues available from the left navigation menu when you Switch Association.

The C-Track E-Filing logo in the top banner of every screen is a link to navigate to your **Home** screen, from any screen in the application.

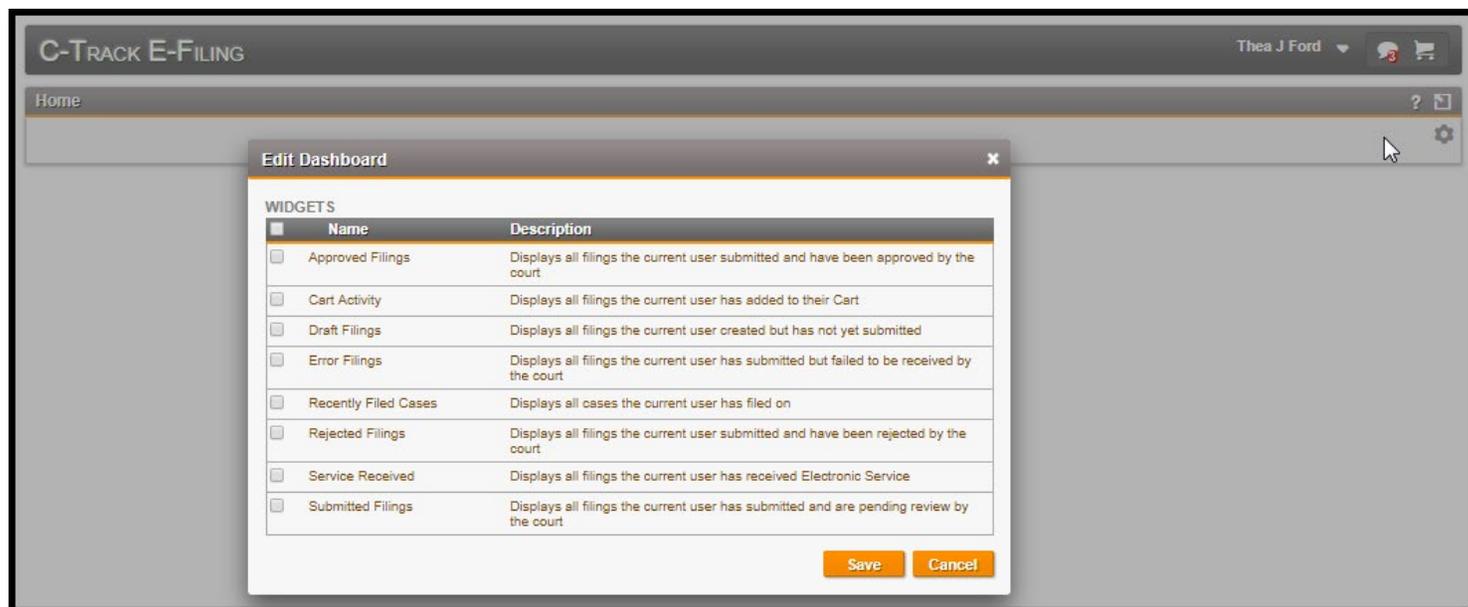


**Fig. 1.17: Home screen – Configure icon**

You can control the appearance of your **Home** screen to view a variety of summary information Widgets.

1. From the **C-Track E-Filing Home** screen, click the **Configure** icon  at the far right of the screen.

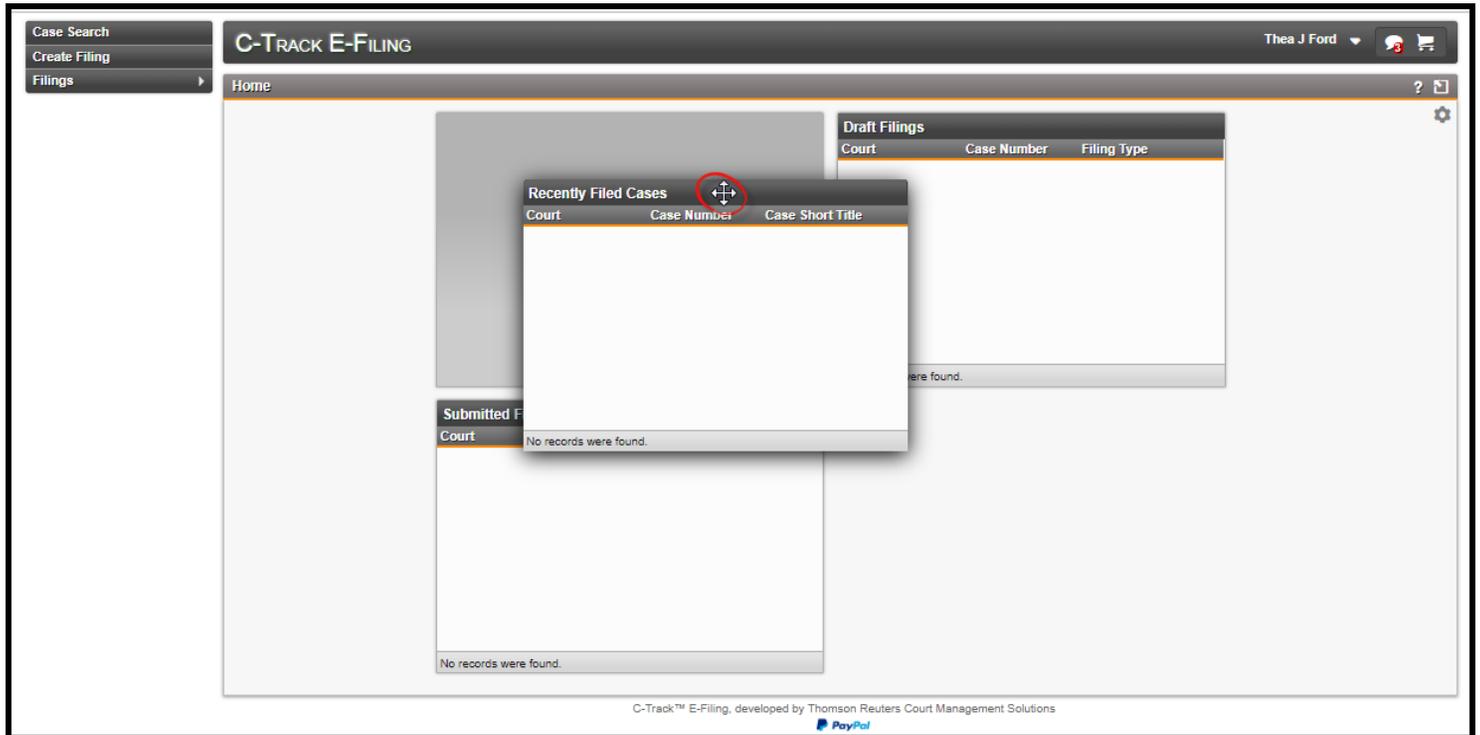
The **Edit Dashboard** window appears.



**Fig. 1.18: Edit Dashboard window**

2. Click the **Select All** check box in the header of the **Widgets** container.
3. Deselect Widgets you prefer not to use.
4. Click **Save**.

Selected Widget containers are added to your **Home** screen. Grab the header of any Widget to drag it to a new location on the screen.



**Fig. 1.19: Home screen – select Widgets added – drag and drop Widget placement**

For users who are members of a Legal Organization, selected **Home** screen. Widgets belong to the account to which you are active. When you select the **Switch Association** option, through the **User Account** menu, your **Home** screen reflects Widget selections made for that association.

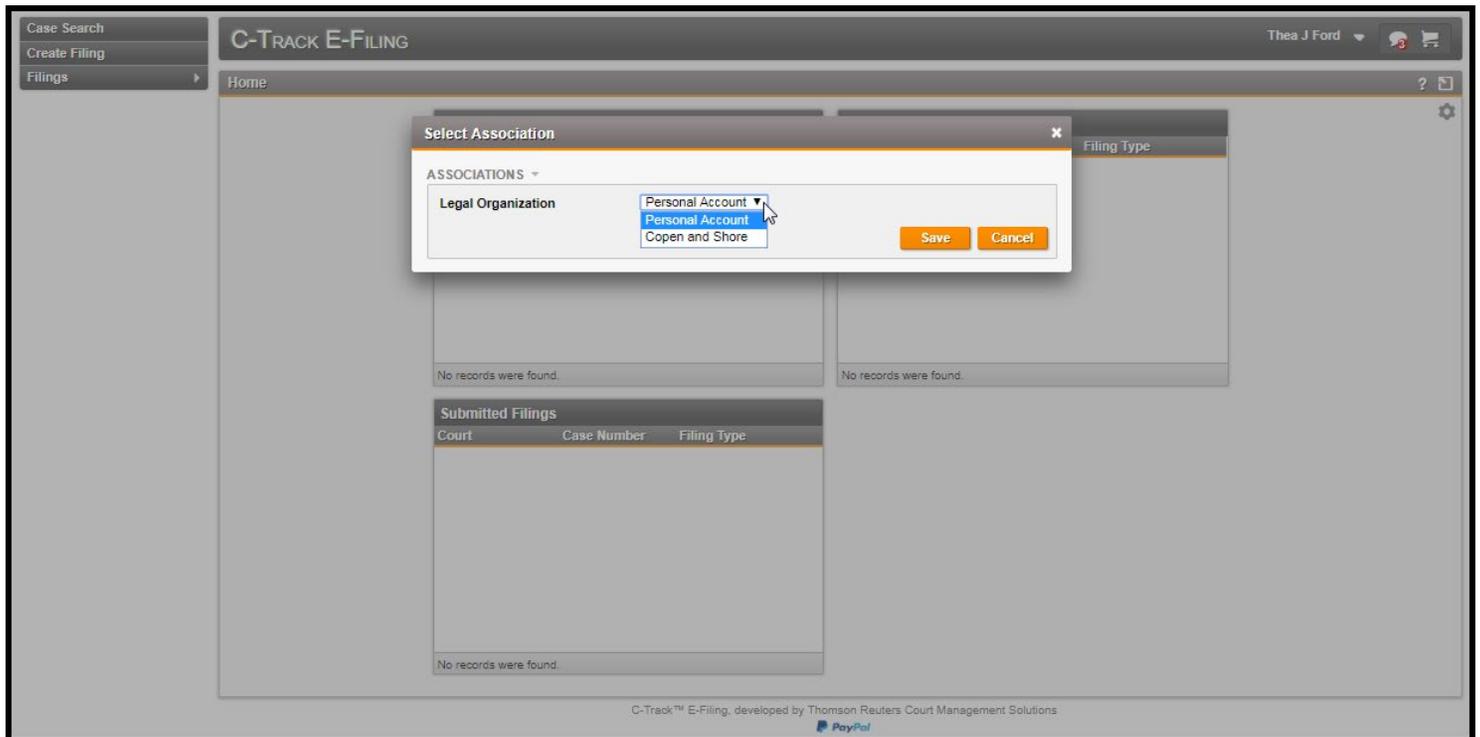
5. Click the arrow to the right of your **User Name** from the far-right top navigation bar.

The **User Action** menu appears.

Legal Organization Association has a one-to-many capacity which lets an authorized E-Filer associate to one or many Legal Organizations, as needed. In this example, the authorized E-Filer has only one Legal Organization.

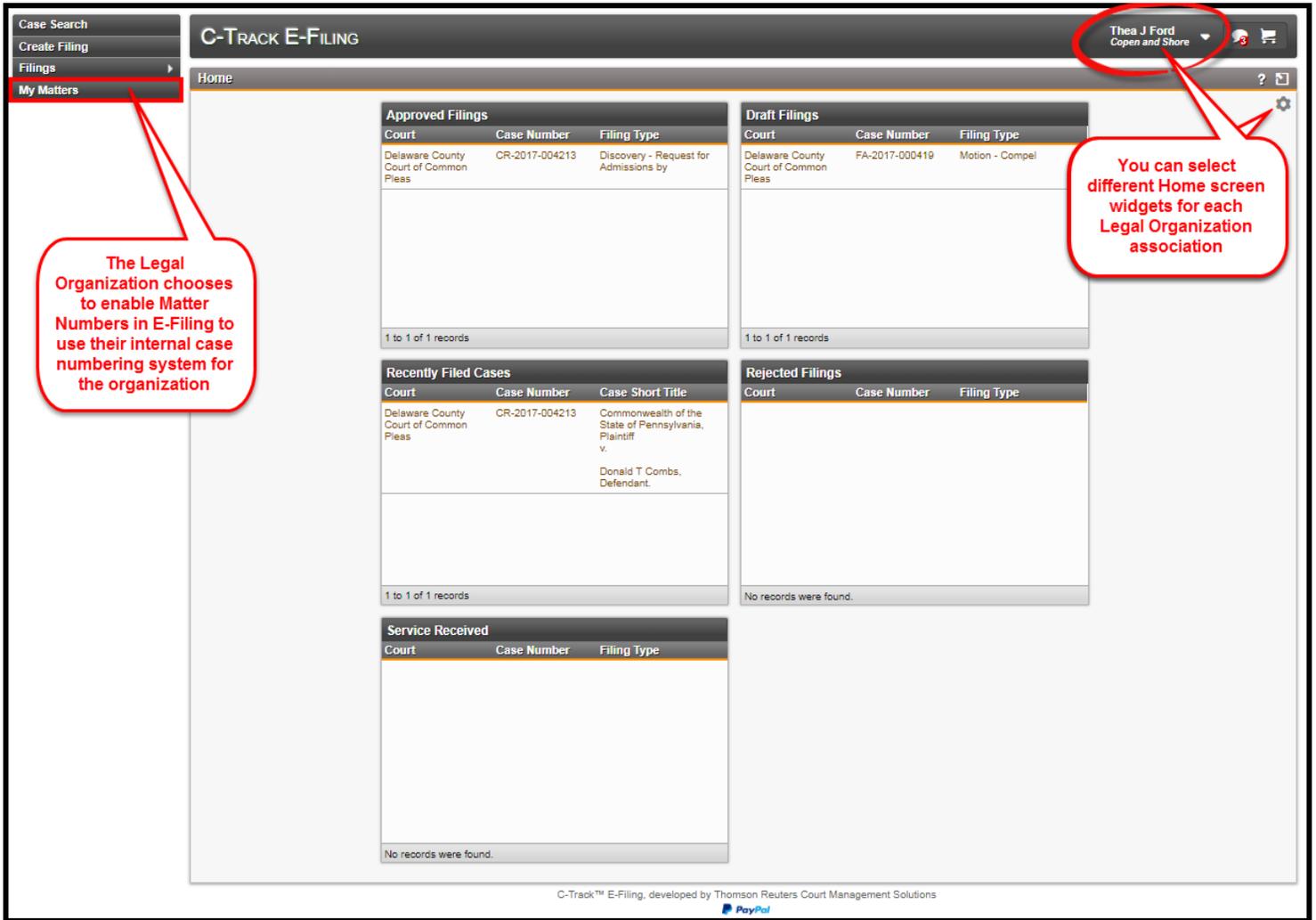
6. Click **Switch Association** from the User Action menu.

The **Select Association** window appears.



**Fig. 1.20: Select Association window**

7. Select the **Legal Organization**.
8. Click **Save**.



**Fig. 1.21: E-File User Legal Organization Home screen**

Note the addition of **My Matters** in the left navigation menu, the appearance of the Legal Organization name below the authorized Users name and different Widgets appear because the user selected Widgets for this Legal Organization associated **Home** screen.

In addition, Filing Queue recorded activities, (the numbers that appear in parenthesis) accessed from the **Filings** left navigation menu, reflect activities for the account that is active.

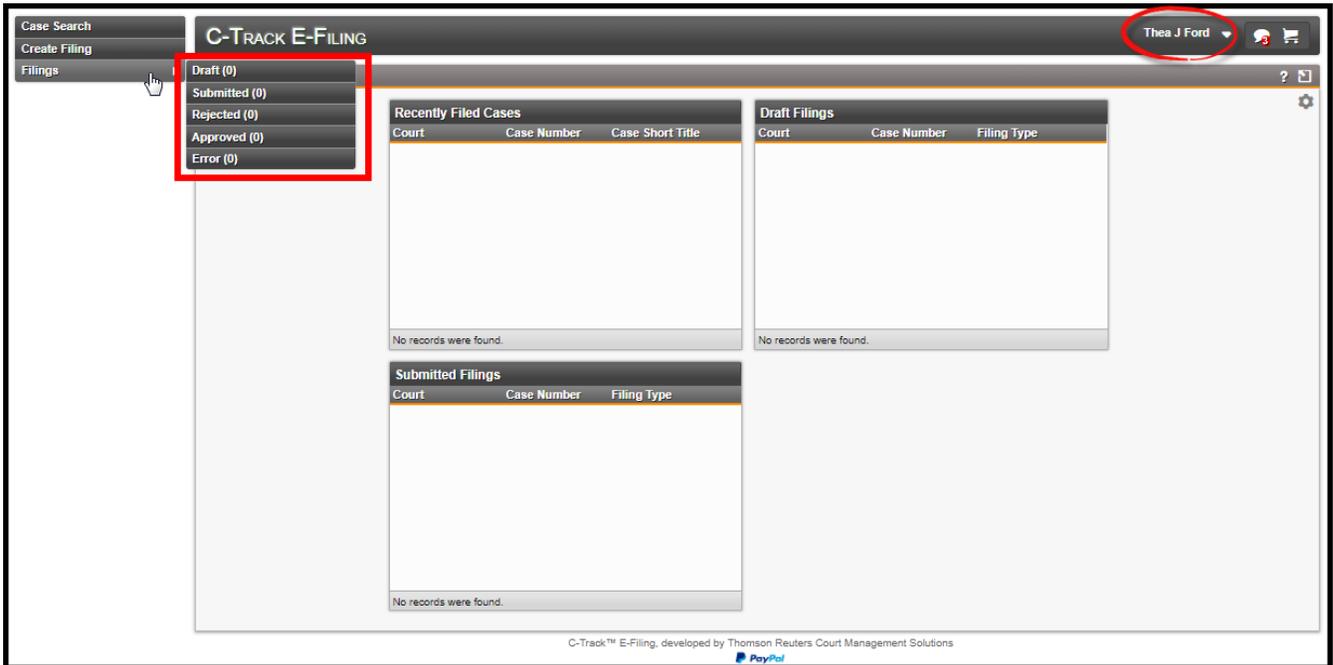


Fig. 1.22: E-File User Home screen – Personal Account

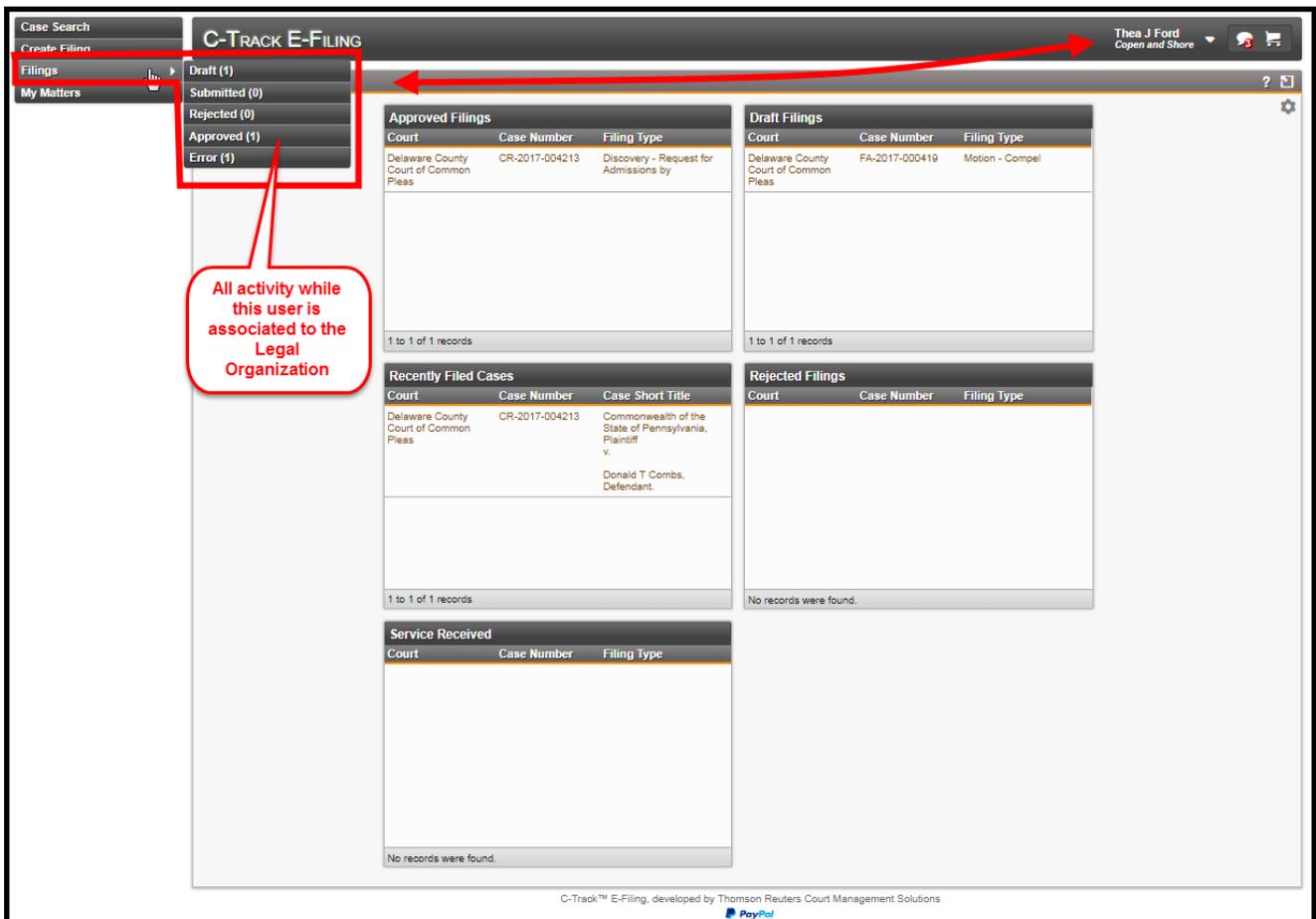
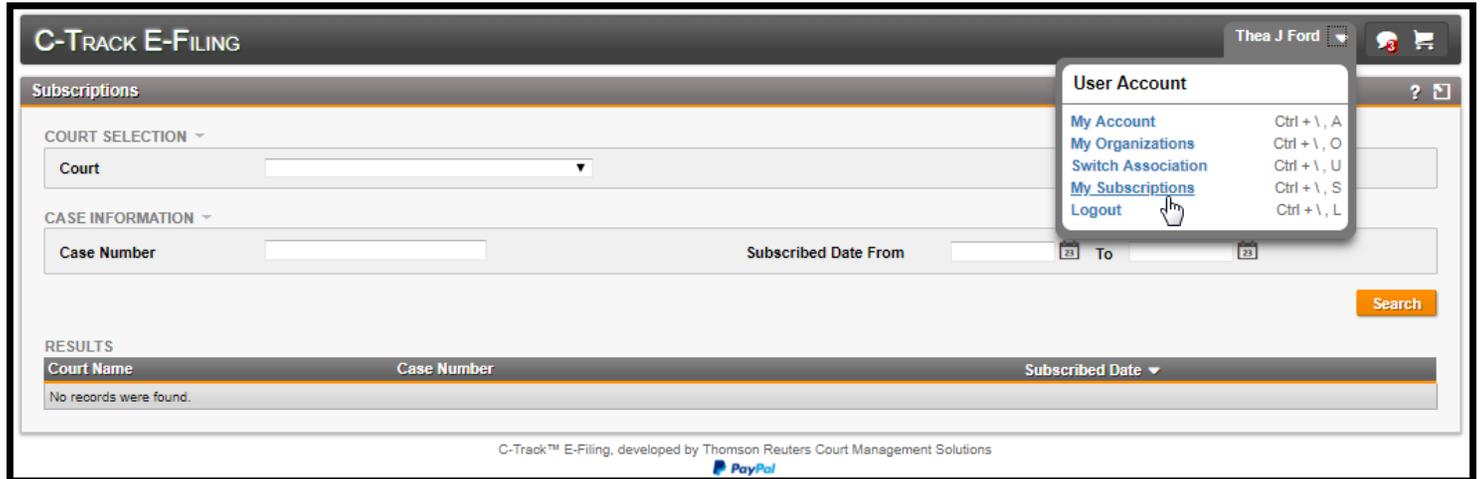
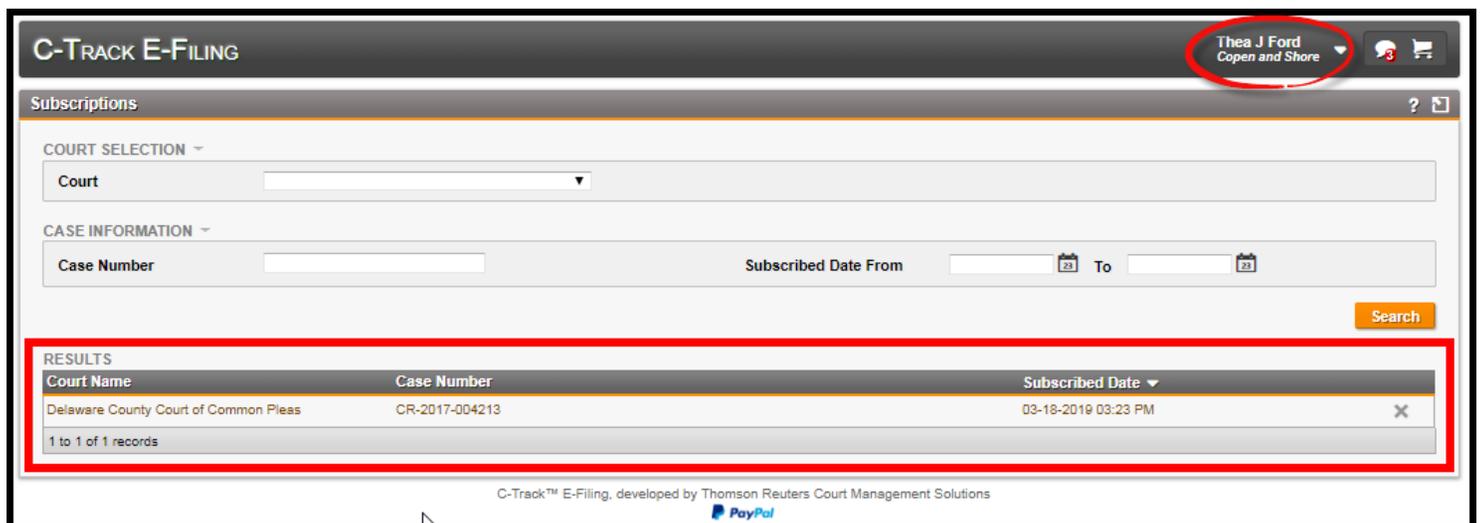


Fig. 1.23: E-File User Home screen - Legal Organization association

**Switch Association** impacts **My Subscriptions** as well. When you submit an electronic filing, processing on the Courts' CMS to accept the filing adds the case to the **My Subscriptions** list and is dependent upon the association at the time the filing was submitted.



**Fig. 1.24: My Subscriptions as E-File User not associated to Legal Organization**

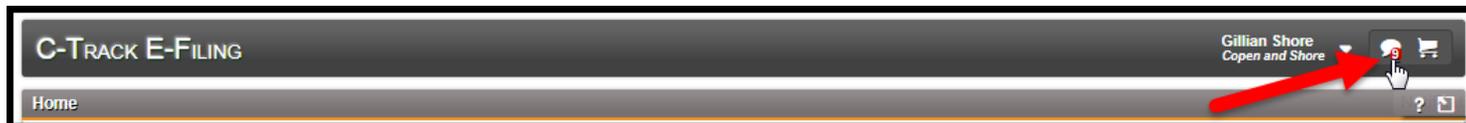


**Fig. 1.25: My Subscriptions as E-File User associated to Legal Organization**

➤ **NOTE:** When you log out of E-File, the association is retained for the next time you log into the E-File system. When you associate your account to a Legal Organization and log out, the association is retained when you log in again icon shows the .

## 1.4 E-Filing Notifications

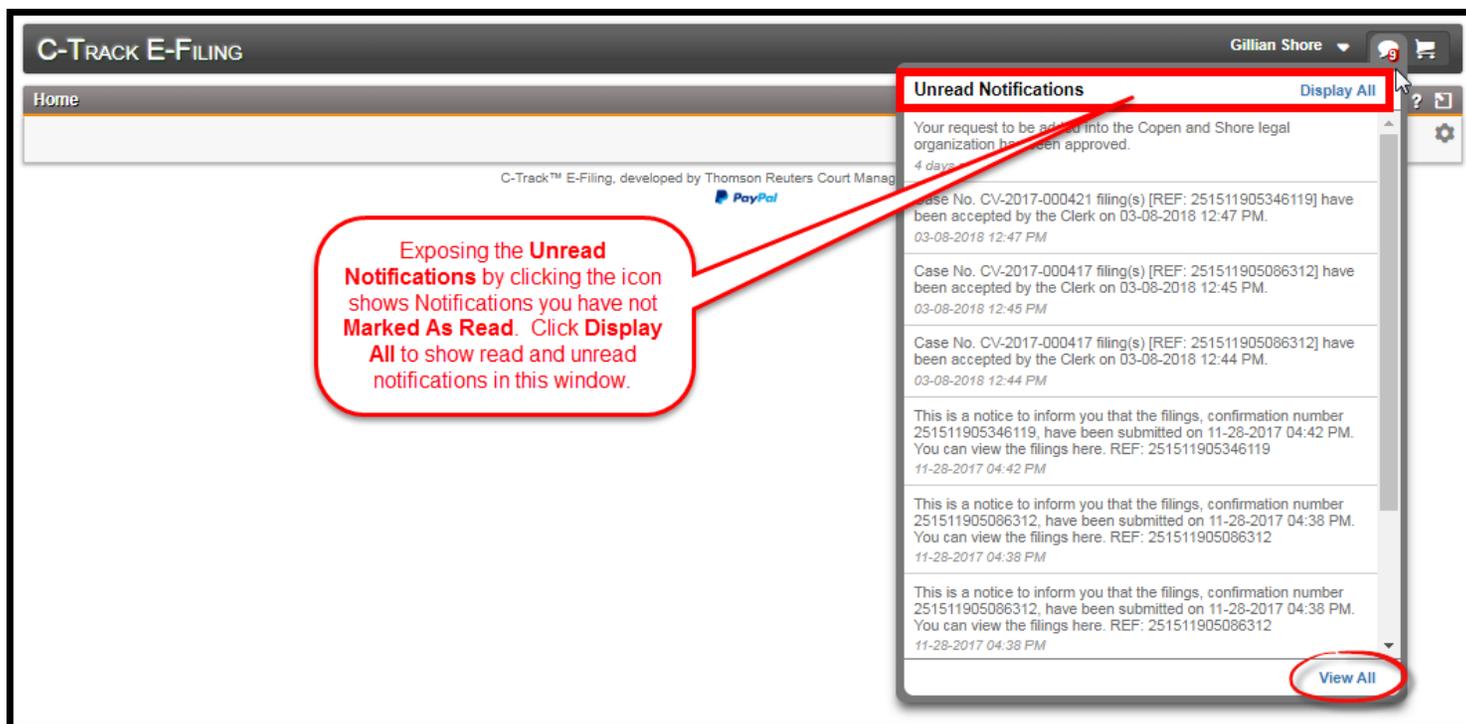
Notifications behave and display the same information about E-File submission regardless of the account that is active. The number that appears in the red circle at the bottom right of the **Notification** icon  includes all unread submission notifications from the users' Personal Account as well as all Legal Organizations to which the user is a member and under which they have filed.



**Fig. 1.26: Home screen - Notifications**

1. Click the **Notification** icon.

The **Notifications** window is exposed. The **View All** link is available at the bottom of the window.



**Fig. 1.27: Home screen – Notifications for the user - Notifications exposed**

2. Click **View All**.

The **Notifications** screen appears.

**NOTIFICATION INFORMATION**

Notification Date From  To  Subject   
 Status\*  Sender

**NOTIFICATIONS**

<input type="checkbox"/>	Date	From	Subject
<input type="checkbox"/>	03-08-2018	Migration	Filing Approval - Case No. CV-2017-000421
<input type="checkbox"/>	03-08-2018	Migration	Filing Approval - Case No. CV-2017-000417
<input type="checkbox"/>	03-08-2018	Migration	Filing Approval - Case No. CV-2017-000417
<input type="checkbox"/>	11-28-2017	Migration	Filing Submission
<input type="checkbox"/>	11-28-2017	Migration	Filing Submission - Case No. CV-2017-000419
<input type="checkbox"/>	11-28-2017	Migration	Filing Submission - Case No. CV-2017-000417
<input type="checkbox"/>	11-28-2017	Migration	Filing Submission - Case No. CV-2017-000417
<input type="checkbox"/>	11-28-2017	Migration	New Legal Organization User Approved

1 to 9 of 9 records | 0 items selected

C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions

**Fig. 1.28: Notifications screen**

The **Notifications** screen has two containers. The **Notifications** display table defaults all notifications, regardless of **Read** or **Unread** status, when you access the screen. The **Notification Information** container lets you enter search criteria of **Notification Date** range, **Subject** and **Sender**.

The **Notifications** display table lets you select any column header to sort the information in ascending / descending order:

**Check box** column – lets you select individual Notification line items as read or unread; the Check box in the table headers lets you select all line items in the table to mark as read or unread

**Date** column – provides the date upon which the submission notification was sent from the CMS to you

**From** column – shows the name of the sender; click the line item here or on the **Subject** column to expand and view details about the Notification and to reveal a **here** link to navigate to the **Filing Summary** screen in a separate browser window.

**Subject** column – a description of the notification; for all submissions that reference a Matter number, the number is included in the subject

**Mark Read** button – marks the submission line items that are selected by check box as Read and reduces the **Notification** icon number displayed at the top of all C-Track E-Filing screens

**Mark Unread** button – marks the submission line items that are selected by check box as Unread and increases the **Notification** icon number displayed at the top of all C-Track E-Filing screens

3. Click the **Subject** of a line item.

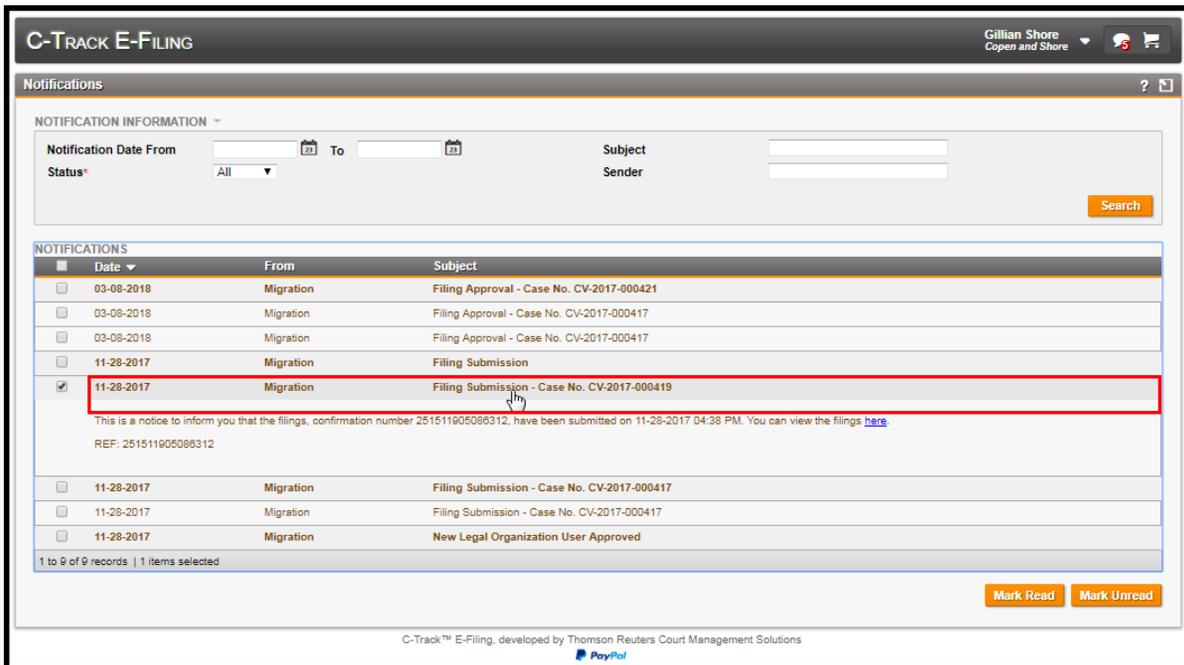


Fig. 1.29: Notifications message expanded

The check box for the line item is selected. The expanded message provides information about the filing referenced in the Subject line. The **here** link in the expanded Subject message opens a separate browser window and navigates to the **Filing Summary** screen of the referenced filing.

4. Click the **Mark Read** button at the bottom right of the **Notifications** display table.

The line item collapses, and the bold appearance is removed indicating the message has been read.

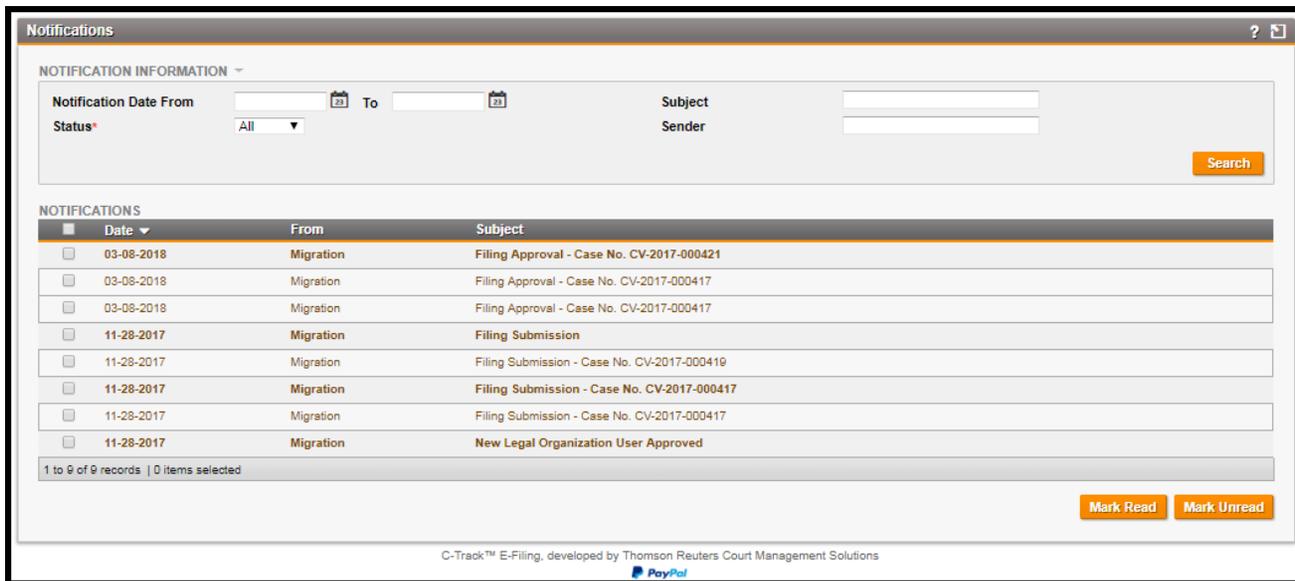


Fig. 1.30: Notifications message read

To find Notifications that have been marked Read, use the All or the Read **Status** as search criteria in the Notification Information container at the top of the screen.

## 1.5 Legal Organization Administration

Legal Organization Administration lets an authorized, registered E-Filer or Non-E-Filer maintain and edit associations of Attorneys and Support Staff to Legal Organizations. Administration of the Legal Organization gives a Legal Organization user the security permission to determine who is part of the Legal Organization.

In this example, an attorney E-Filer is the administrator of the Legal Organization. If you are a Non-E-Filing administrator, you do not see other menu options – Administration is the only available menu. There are no menu options for Case Search or Create Filing as this Legal Organization Administrator manages the users of C-Track E-Filing for an organization but, does not themselves create or submit e-filings for themselves or other authorized filers.



Fig. 1.31: Home screen – Menu for Attorney Legal Org Admin associated to Personal Account



Fig. 1.32: Home screen – Menu for Attorney Legal Org Admin not associated to Legal Org

1. Follow the left menu path **Administration > Legal Organization Admin**.

The **Legal Organization Search** screen appears.

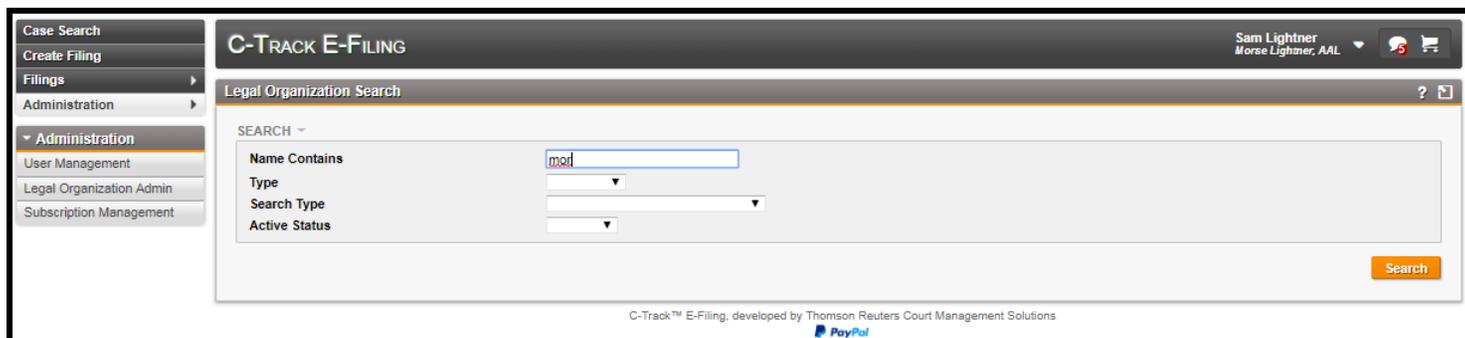
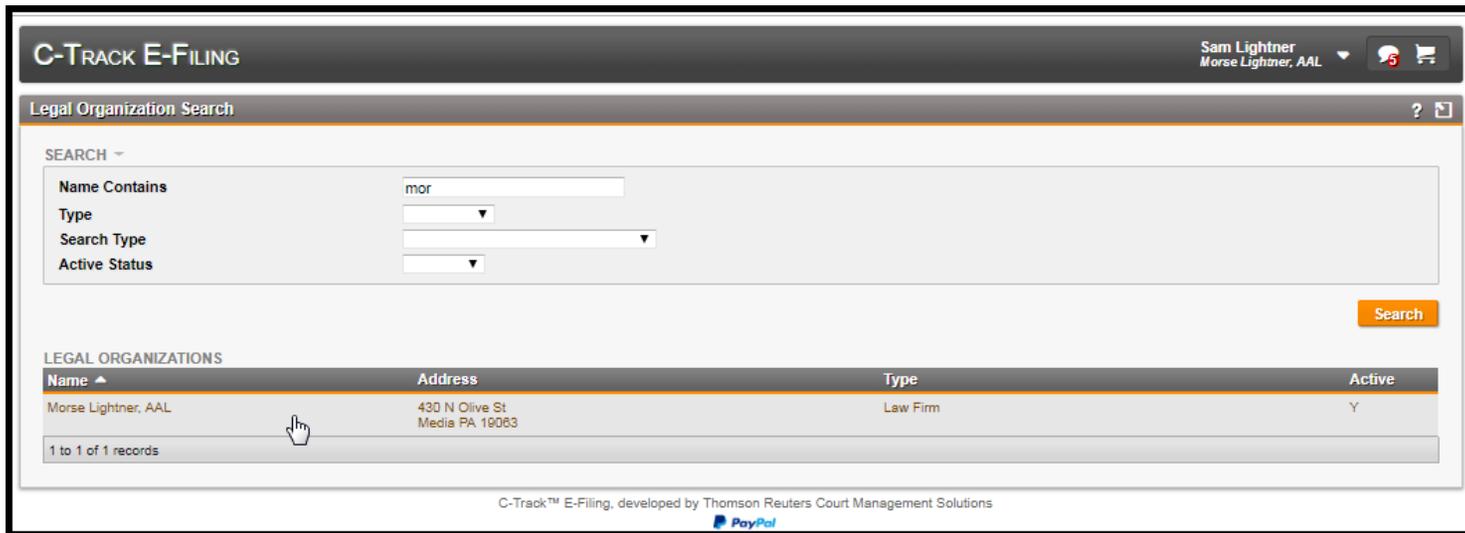


Fig. 1.33: Legal Organization Search screen

2. Enter Search criteria, such as the **Name** of Legal Organization for which you have administrative permissions.
3. Click **Search**.

The **Legal Organizations** display table is added to the **Legal Organization Search** screen. Any organization that matches the search criteria appears in the table.



**Fig. 1.34: Legal Organization Search screen - Legal Organizations display table**

The **Legal Organizations** display table:

- Name** column – name of the law firm or agency designated as a Legal Organization
- Address** column – mailing address for a legal organization
- Type** column – describes the nature of the Legal Organization
- Active** column – indicates the state of the Legal Organization

4. Select the line item for the **Legal Organization**.

The **Manage Legal Organization** screen for the selected Legal Organization appears.

**C-TRACK E-FILING** Sam Lightner  
Morse Lightner, AAL

**Manage Legal Organization**

**LEGAL ORGANIZATION DETAILS**

Type: Law Firm  
Name: Morse Lightner, AAL  
Matter Numbers Enabled:   
Active:  [Edit](#)

**CONTACTS** [Add](#)

**ADDRESS**

**Mailing Address**  
430 N Olive St  
Media Pennsylvania United States 19063

**EMAIL DOMAINS** [Add](#)

**LEGAL ORGANIZATION PENDING ASSOCIATION**

Name	Role	E-mail	Status
Morse, Julie	Attorney	nanowiz+JMorse@gmail.com	<a href="#">Link</a>
deWolf, Emily T	Attorney	nanowiz+ewolf@gmail.com	<a href="#">Link</a>
Owens, Tim	Support Staff	nanowiz+towens@gmail.com	<a href="#">Link</a>

**LEGAL ORGANIZATION USER SEARCH**

Name Contains:  E-mail:   
Status:  Role:  [Search](#)

**LEGAL ORGANIZATION USERS**

Name	Role	E-mail	Status	Support Staff
Morse, Julie	Attorney	nanowiz+JMorse@gmail.com	Pending Approval	<a href="#">View/Edit</a>
Lightner, Sam	Legal Organization Admin	nanowiz+slight@gmail.com	Approved	<a href="#">View/Edit</a>
deWolf, Emily T	Attorney	nanowiz+ewolf@gmail.com	Pending Approval	<a href="#">View/Edit</a>
Owens, Tim	Support Staff	nanowiz+towens@gmail.com	Pending Approval	<a href="#">View/Edit</a>

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**Fig. 1.35: Manage Legal Organization screen**

The **Manage Legal Organization** screen provides **Add** and **Edit** links to information about the legal organization. The **Legal Organization Details** container identifies the **Name** and **Type** of Legal Organization and **Status**. Additionally, this container lets a Legal Organization use Matter Numbers functionality to share electronic filing permission.

The **Contacts** container provides methods by which you contact the Legal Organization.

The **Address** container provides the physical mailing **Address** for the Legal Organization. This is important when Service information is used for an electronic filing.

The **Email Domains** container lets you specify a primary mail server for electronic communications. When you provide a domain (@yourdomainnamehere.com) and a new filer with an active email account with the domain registers as an E-Filer, they are automatically approved since the domain for the Legal Org is known to E-File.

The **Legal Organization Pending Association** display table shows authorized, registered E-File Users who have requested an association to the Legal Organization. The Pending Association means the Legal Organization and E-Filer need to be linked. All column headers are sortable.

**Name** column – name of the entity requesting to be linked to the Legal Organization

**Role** column – nature of the relationship to the Legal Organization

**E-mail** column – electronic account used by the E-Filer to register in the C-Track E-File application

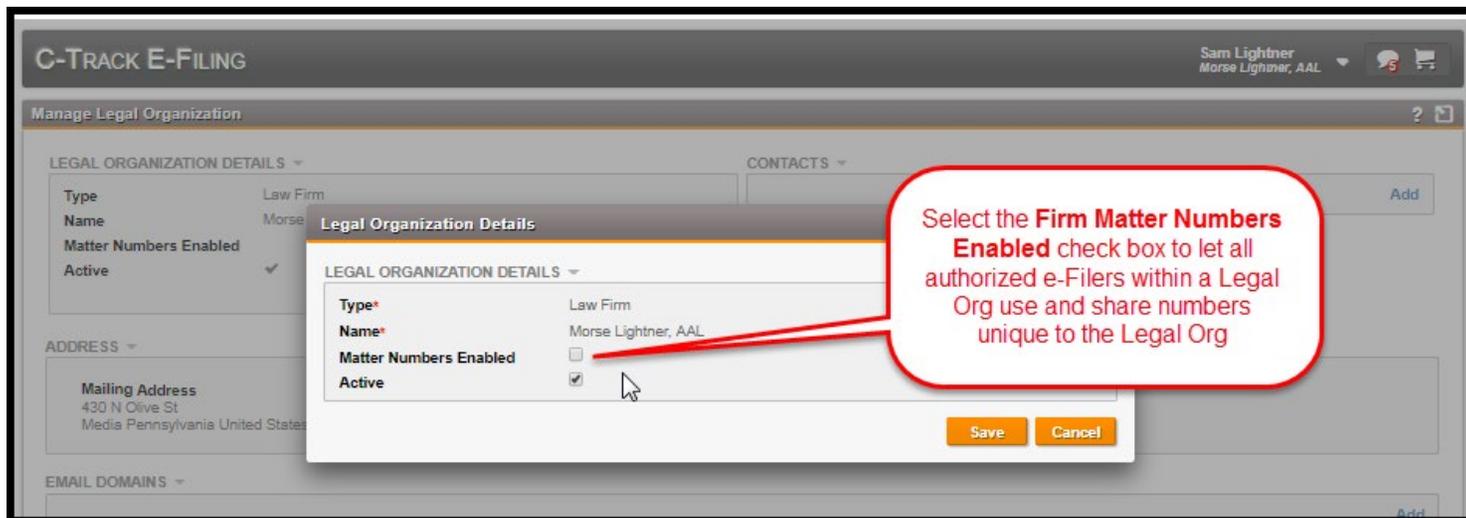
**Status** column – **Link** requires you click the link to update the E-Filers status

The **Legal Organization User Search** container lets you search for Users already associated to the Legal Organization.

The **Legal Organization Users** display table shows search results for associated users.

5. Click **Edit** from the **Legal Organization Details** container.

The **Legal Organization Details** window opens.



**Fig. 1.36: Legal Organization Details** window

6. Select the **Firm Matter Numbers Enabled** check box.
7. Click **Save**.

You return to the **Manage Legal Organization** screen. **Matter Numbers Enabled** check box displays in the **Legal Organization Details** container.

8. Update additional information about the Legal Organization, using the **Add** and **Edit** links, as needed.
9. Click **Search** in the **Legal Organization User Search** container.

Legal Organization users who are associated in any way appear in the **Legal Organization Users** display table at the bottom of the screen.

**LEGAL ORGANIZATION DETAILS**

Type: Law Firm  
 Name: Morse Lightner, AAL  
 Matter Numbers Enabled:   
 Active:

**CONTACTS**

**ADDRESS**

Mailing Address  
 430 N Olive St  
 Media Pennsylvania United States 19063

**EMAIL DOMAINS**

Domain	gmail.com	Edit
Domain	morselightner.com	Edit

**LEGAL ORGANIZATION PENDING ASSOCIATION**

Name	Role	E-mail	Status
Morse, Julie	Attorney	nanowiz+JMorse@gmail.com	Link
deWolf, Emily T	Attorney	nanowiz+ewolf@gmail.com	Link
Owens, Tim	Support Staff	nanowiz+towens@gmail.com	Link

**LEGAL ORGANIZATION USER SEARCH**

Name Contains:   
 Status:   
 E-mail:   
 Role:

**LEGAL ORGANIZATION USERS**

Name	Role	E-mail	Status	Support Staff
Morse, Julie	Attorney	nanowiz+JMorse@gmail.com	Pending Approval	View/Edit
Lightner, Sam	Legal Organization Admin	nanowiz+slight@gmail.com	Approved	View/Edit
deWolf, Emily T	Attorney	nanowiz+ewolf@gmail.com	Pending Approval	View/Edit
Owens, Tim	Support Staff	nanowiz+towens@gmail.com	Pending Approval	View/Edit

**Fig. 1.37: Manage Legal Organization screen - Legal Organization Users searched**

10. Click **Link** from the **Status** column in the **Legal Organization Pending Association** display table.

The **User – Legal Organization Details** window appears.

**LEGAL ORGANIZATION PENDING ASSOCIATION**

Name	Role	E-mail	Status
Morse, Julie	Attorney	nanowiz+JMorse@gmail.com	Link
deWolf, Emily T	Attorney	nanowiz+ewolf@gmail.com	Link
Owens, Tim	Support Staff	nanowiz+towens@gmail.com	Link

**LEGAL ORGANIZATION USER SEARCH**

Name Contains:   
 Status:   
 E-mail:   
 Role:

**LEGAL ORGANIZATION USERS**

Name	Role	E-mail	Status	Support Staff
Morse, Julie	Attorney	nanowiz+JMorse@gmail.com	Pending Approval	View/Edit
Lightner, Sam	Legal Organization Admin	nanowiz+slight@gmail.com	Approved	View/Edit
deWolf, Emily T	Attorney	nanowiz+ewolf@gmail.com	Pending Approval	View/Edit
Owens, Tim	Support Staff	nanowiz+towens@gmail.com	Pending Approval	View/Edit

**User-Legal Organization Details**

**USER-LEGAL ORGANIZATION DETAILS**

Active:   
 Role: Attorney  
 Service E-Mail: JMorse@gmail.com  
 JMorse@morselightner.com

Add Another

Save Remove Cancel

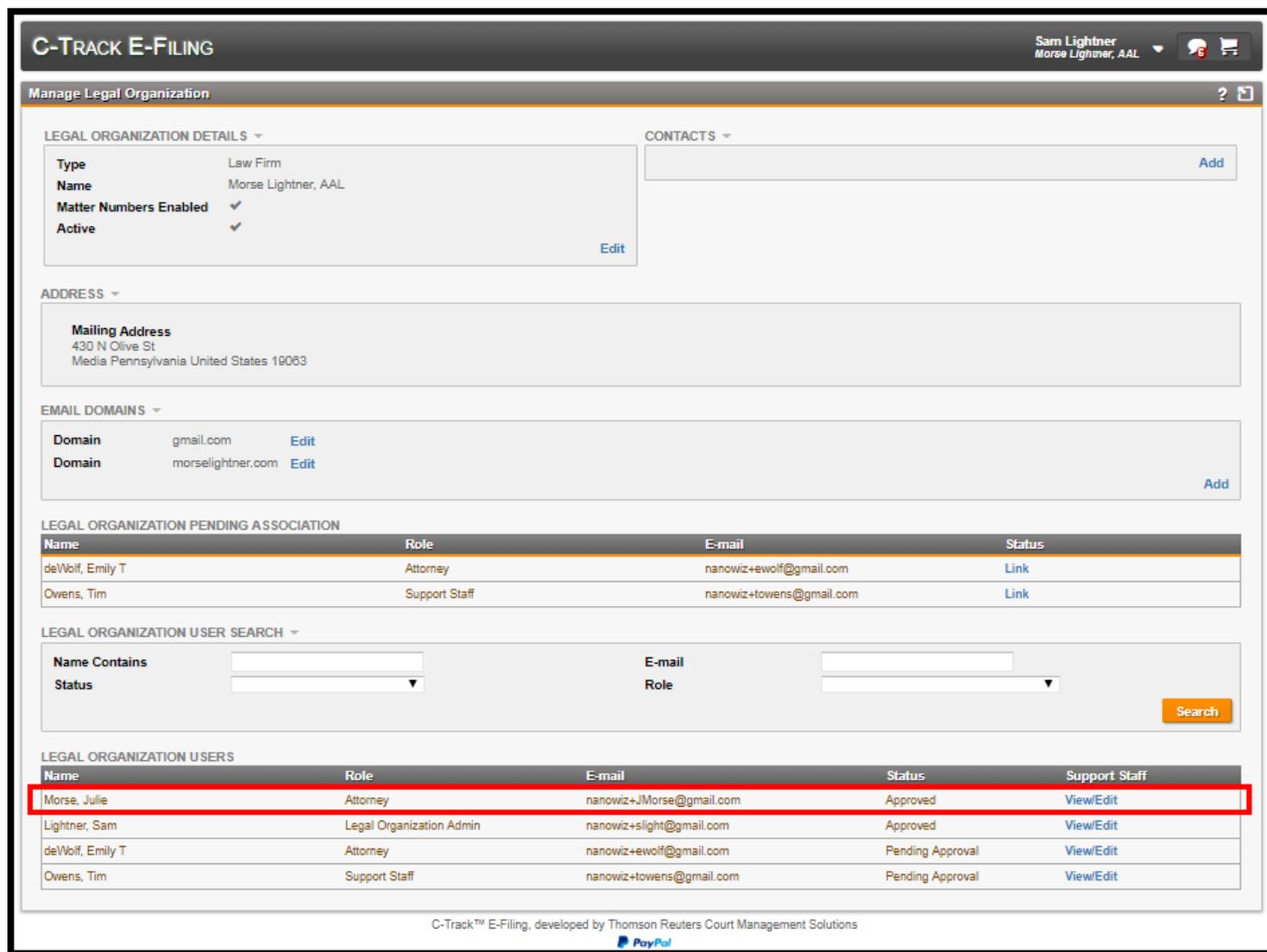
**Fig. 1.38: User – Legal Organization Details window**

The **User – Legal Organization Details** container provides an editable summary of the users **Role**, and **Service Email** address where notifications about electronic filing activities are sent. The **Active** check box controls the **Status** of the user. The **Add Another** link lets you add additional email addresses for other authorized E-Filers associated to the Legal Organization to receive all communications regarding submissions, acceptances and rejections, when Matter Numbers are enabled.

The **Remove** button lets you end the association of the E-Filer to the Legal Organization but does not remove the E-Filer from the application.

11. Select the **Active** check box.
12. Click **Save**.

You return to the **Manage Legal Organization** screen. The user is removed from the **Legal Organization Pending Association** display table and appears in the **Legal Organization Users** display table with a **Status** of Approved.



**Fig. 1.39: Manage Legal Organization screen**

13. Click **Search** in the **Legal Organization User Search** container.

Legal Organization users appear in the **Legal Organization Users** display table.

**C-TRACK E-FILING** Sam Lightner  
Morse Lightner, AAL

**Manage Legal Organization**

**LEGAL ORGANIZATION DETAILS**

Type: Law Firm  
Name: Morse Lightner, AAL  
Matter Numbers Enabled: ✓  
Active: ✓  
[Edit](#)

**CONTACTS**  
[Add](#)

**ADDRESS**

**Mailing Address**  
430 N Olive St  
Media Pennsylvania United States 19063

**EMAIL DOMAINS**

Domain: gmail.com [Edit](#)  
Domain: morselightner.com [Edit](#)  
[Add](#)

**LEGAL ORGANIZATION PENDING ASSOCIATION**

Name	Role	E-mail	Status
Owens, Tim	Support Staff	nanowiz+towens@gmail.com	<a href="#">Link</a>

**LEGAL ORGANIZATION USER SEARCH**

Name Contains:   
Status:   
E-mail:   
Role:   
[Search](#)

**LEGAL ORGANIZATION USERS**

Name	Role	E-mail	Status	Support Staff
Morse, Julie	Attorney	nanowiz+JMorse@gmail.com	Approved	<a href="#">View/Edit</a>
Lightner, Sam	Legal Organization Admin	nanowiz+slight@gmail.com	Approved	<a href="#">View/Edit</a>
deWolf, Emily T	Attorney	nanowiz+ewolf@gmail.com	Approved	<a href="#">View/Edit</a>
Owens, Tim	Support Staff	nanowiz+towens@gmail.com	Pending Approval	<a href="#">View/Edit</a>

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**Fig. 1.40: Manage Legal Organization screen**

14. Select the **User** with a **Status** of Pending Approval from the **Legal Organization User** display table.

The **User – Legal Organization Details** window appears.

15. Repeat steps 11 through 13.

When you return to the **Manage Legal Organization** screen all pending associations are approved.

Now we look at another Legal Organization with a Legal Organization User whose **Status** is currently rejected. We change the **Status** to approved.

**C-TRACK E-FILING** Thea J Ford  
Copen and Shore

**Manage Legal Organization**

**LEGAL ORGANIZATION DETAILS**

Type: Law Firm  
 Name: Copen and Shore  
 Matter Numbers Enabled:   
 Active:  [Edit](#)

**CONTACTS** [Add](#)

**ADDRESS**

**Mailing Address**  
 96 E Emerald Ave  
 Media United States 19063

**EMAIL DOMAINS**

Domain: gmail.com [Edit](#) [Add](#)

**LEGAL ORGANIZATION PENDING A ASSOCIATION**

Name	Role	E-mail	Status
No records were found.			

**LEGAL ORGANIZATION USER SEARCH**

Name Contains:   
 Status:   
 E-mail:   
 Role:  [Search](#)

**LEGAL ORGANIZATION USERS**

Name	Role	E-mail	Status	Support Staff
Linney, Laurant	Attorney	LLinn@gmail.com	Approved	<a href="#">View/Edit</a>
Shore, Gillian	Attorney	gshore@gmail.com	Approved	<a href="#">View/Edit</a>
Copen, Alex	Attorney	acopen@gmail.com	Approved	<a href="#">View/Edit</a>
Simms, Genna	Attorney	GSimms@gmail.com	Rejected	<a href="#">View/Edit</a>
Domico, Lia	Support Staff	ldom@gmail.com	Approved	<a href="#">View/Edit</a>
Ford, Thea J	Legal Organization Admin	TFord@gmail.com	Approved	<a href="#">View/Edit</a>

C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions

**Fig. 1.41: Manage Legal Organization screen**

16. Select the line item for the **User** with a **Status** of Rejected from the **Legal Organization User** display table. The **User – Legal Organization Details** window appears.

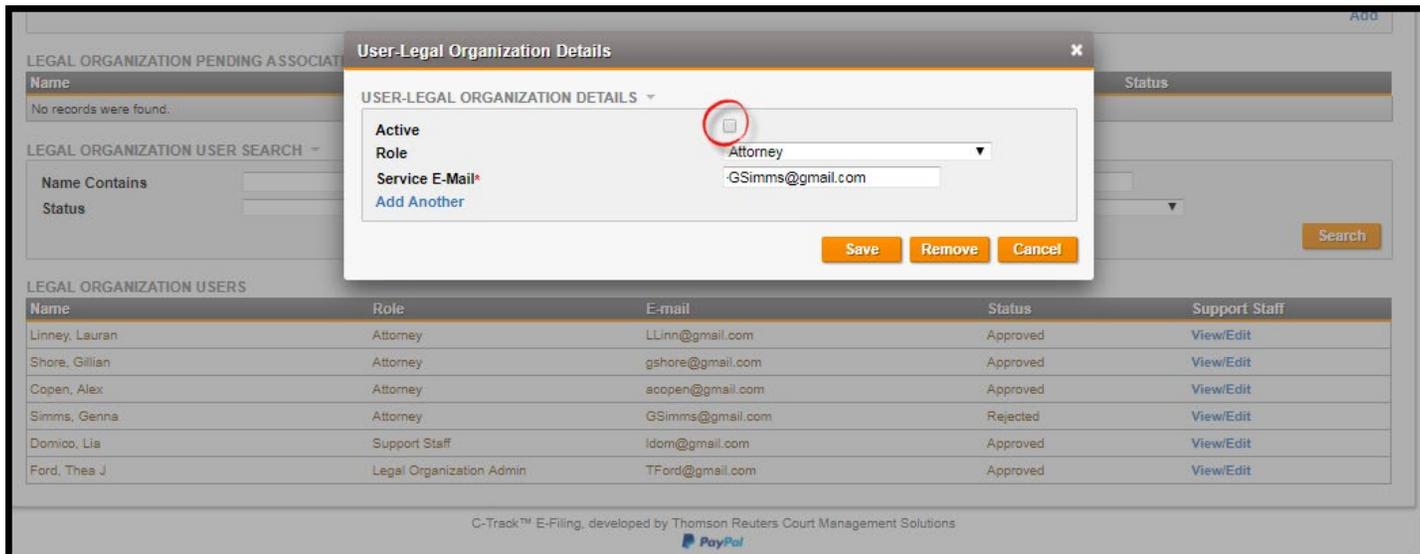


Fig. 1.42: User – Legal Organization Details window

- 17. Select the **Active** check box.
- 18. Click **Save**.

You return to the **Manage Legal Organization** screen. The Users **Status** is updated to Approved.

Now, we associate a Support Staff member of your Legal Organization to an E-Filer, and make the support staff an Authorized E-Filer you allow them access to all filings available through Filings menus, including filings in Draft status. Support staff do not need to have Matters shared with them to access filings when they use the **Switch Association** functionality to establish the association. Essentially, Support Staff associated through the Legal Organization gives them security permission to initiate and complete filings on legal organization E-Filers behalf.



Fig. 1.43: Legal Organization Users display table

- 19. Click the **View / Edit** link from the **Support Staff** column of the **Legal Organization Users** display table.

The **Authorized Support Staff** window appears.

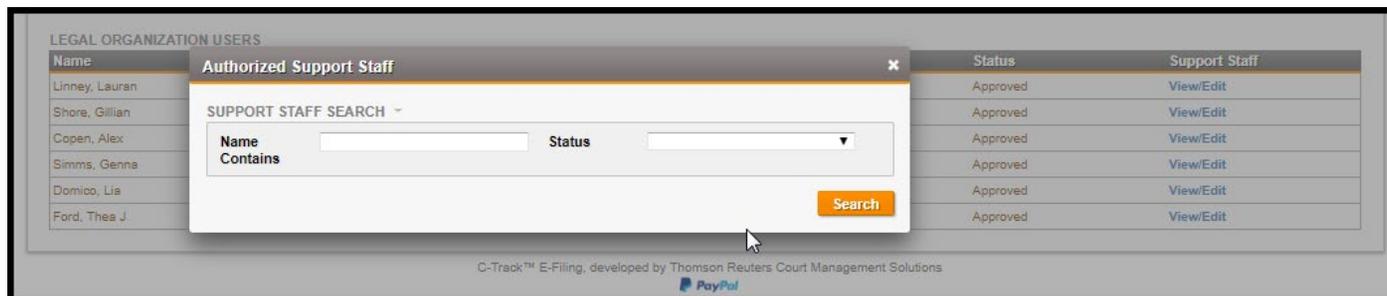
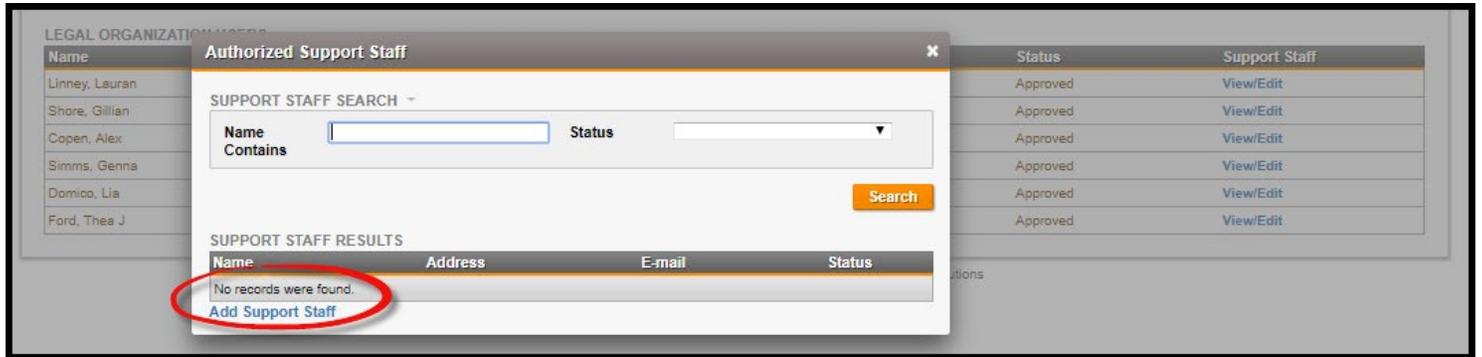


Fig. 1.44: Authorized Support Staff window

The **Authorized Support Staff** window has a single container, **Search**.

20. Click **Search**.

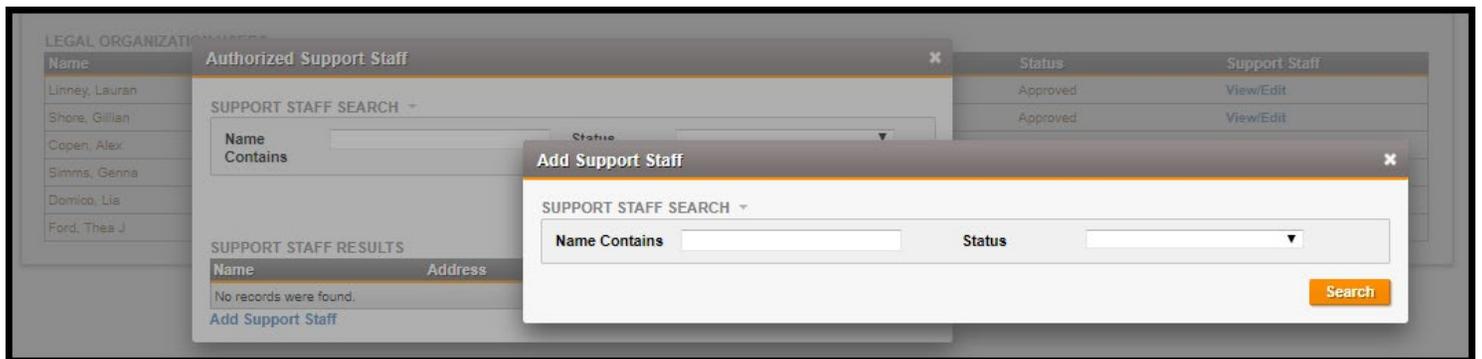
The **Support Staff Results** display table and the **Add Support Staff** link appear.



**Fig. 1.45: Support Staff Results display table - Add Support Staff link**

21. Click the **Add Support Staff** link.

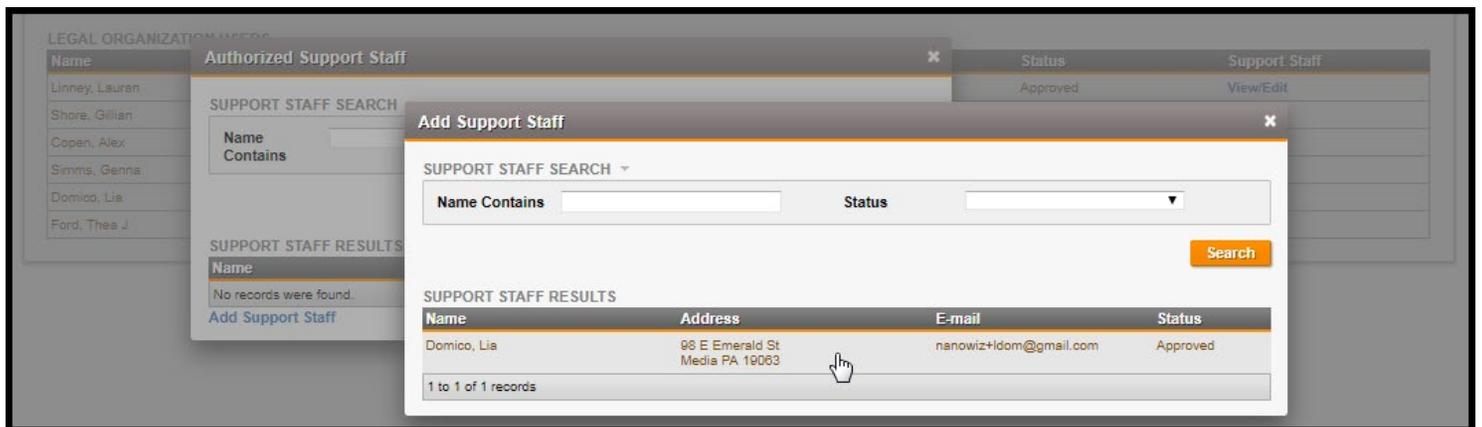
The **Add Support Staff** window appears.



**Fig. 1.46: Add Support Staff window**

22. Click **Search**.

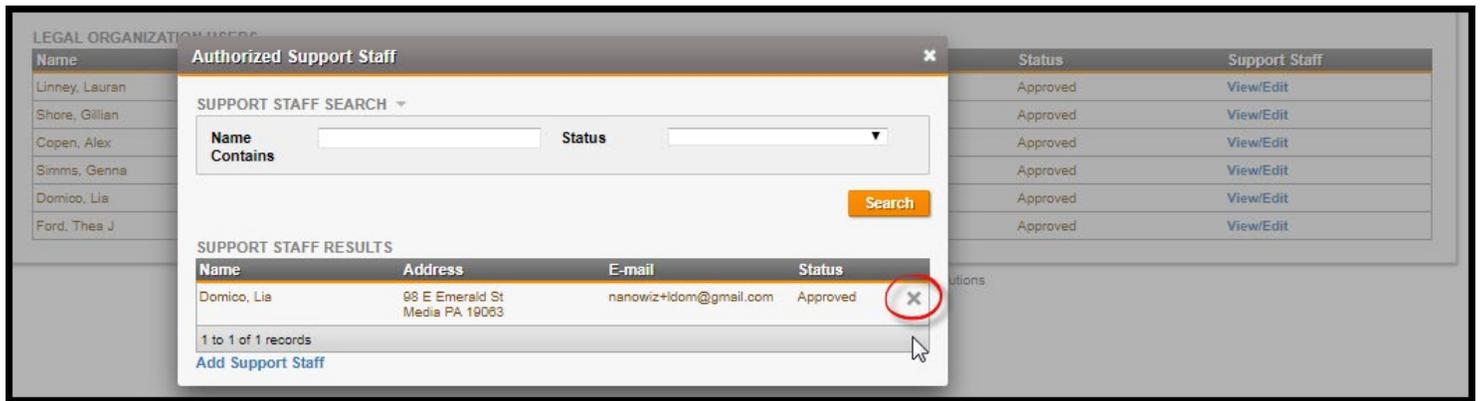
All Legal Organization users with a role of Support Staff appears in the **Support Staff Results** display table.



**Fig. 1.47: Add Support Staff results**

23. Select the line item for the staff member you want to associate as Support Staff to the selected Authorized E-Filer.

You return to the **Authorized Support Staff** window.



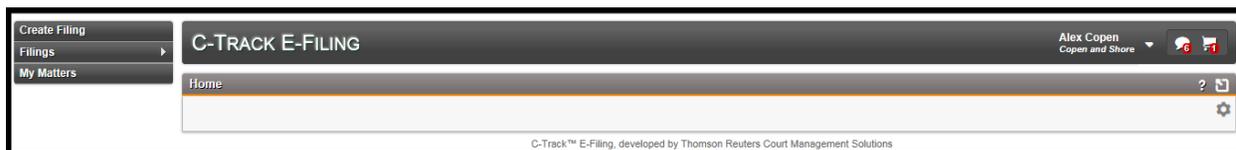
**Fig. 1.48: Add Support Staff results**

If you needed to remove the support staff association, the **X** at the far right of the line item lets you end the association between the Authorized E-Filer and the Support Staff.

## 1.6 Matter Numbers and Matter Sharing

As we have seen in the previous section, the Legal Organization has an impact on filings that appear in the users Filings menu queues. Matter Numbers entered on new case or existing case filings, when a user files while associated to their Legal Organization, lets them share the Matter Number, and filings related to that Matter number with other users in the same Legal Organization. When a Matter is Shared, it gives viewing permission to other authorized E-Filers in your Legal Organization.

In this section we add a Matter Number to a case and share a Matter with a Colleague in the same Legal Organization.

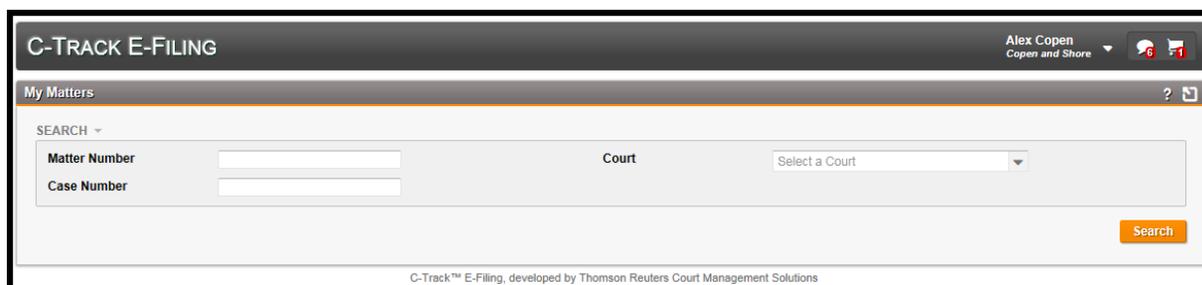


**Fig. 1.49: Home screen – User associated to Legal Organization**

Note from the **Home** screen you see the user is associated to a Legal Organization.

1. Click **My Matters** from the left navigation menu

The **My Matters** screen appears.

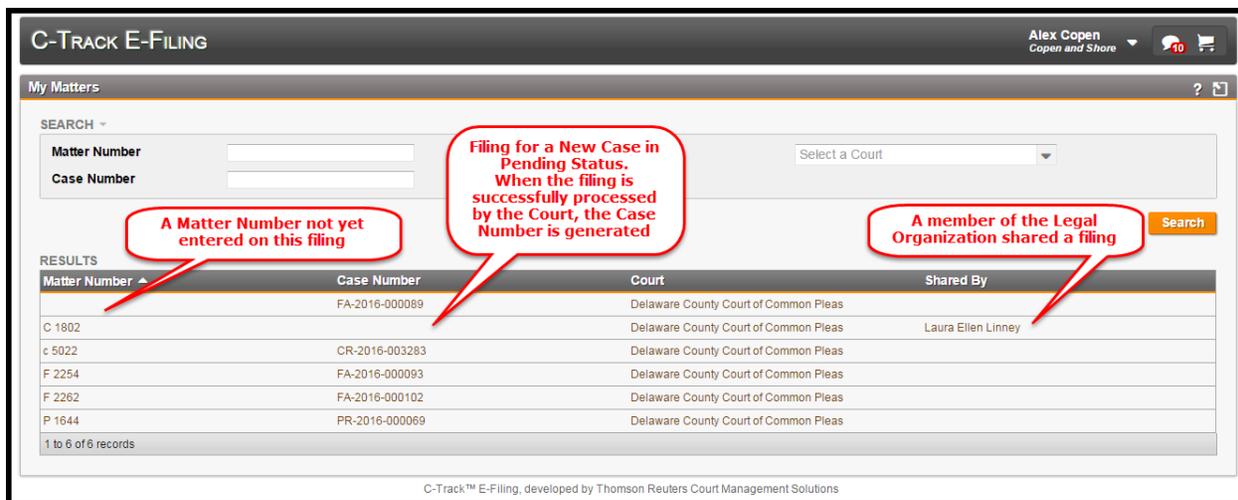


**Fig. 1.50: My Matters screen**

The **My Matters** screen has a single **Search** container where you can specify a Matter Number, Case Number and Court upon which to search. No criteria is required to perform a search for Matter Numbers that are associated to you.

2. Click **Search**.

All Results appear in the **Results** display table.



**Fig. 1.51: My Matters screen - Search results displayed**

The **Results** display table lets you select any column header to sort the information in ascending / descending order:

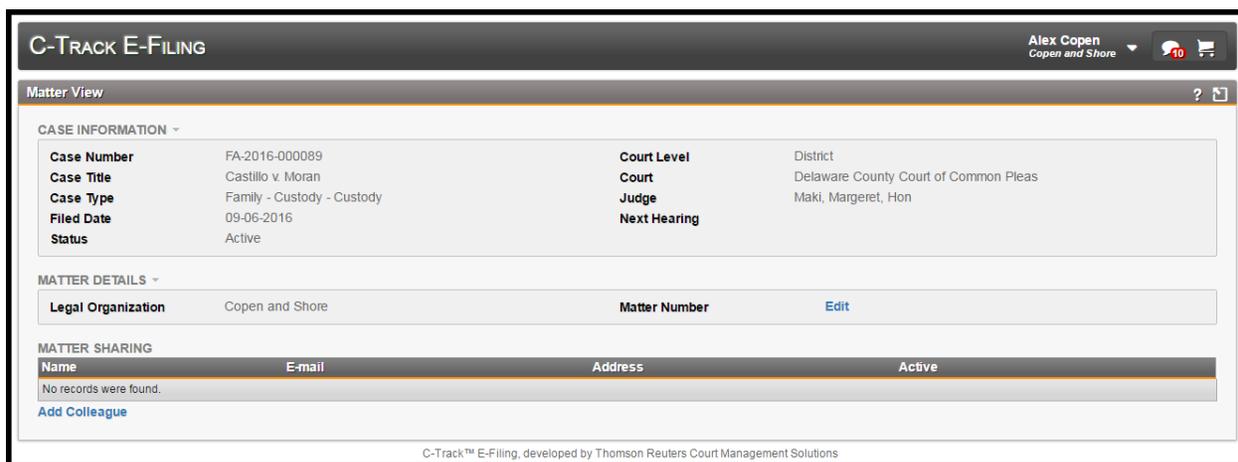
**Matter Number** column – shows the internal case number of the Legal Organization. The Matter Number can be selected to navigate to the **Matter View** screen where you can edit the number and share the matter with other colleagues in your Legal Organization.

**Case Number** column – provides the C-Track Case Number, which is auto-generated when the case is created or the filing is approved in the C-Track application. The Case Number can be selected to navigate to the **Case View** screen which provides a summary of the case.

**Court** column – shows the Court in which the case is proceeding

**Shared By** column – lists all members of your Legal Organization who are authorized to access the matter

3. Select the Matter line item that displays no **Matter Number**.



**Fig. 1.52: Matter View screen**

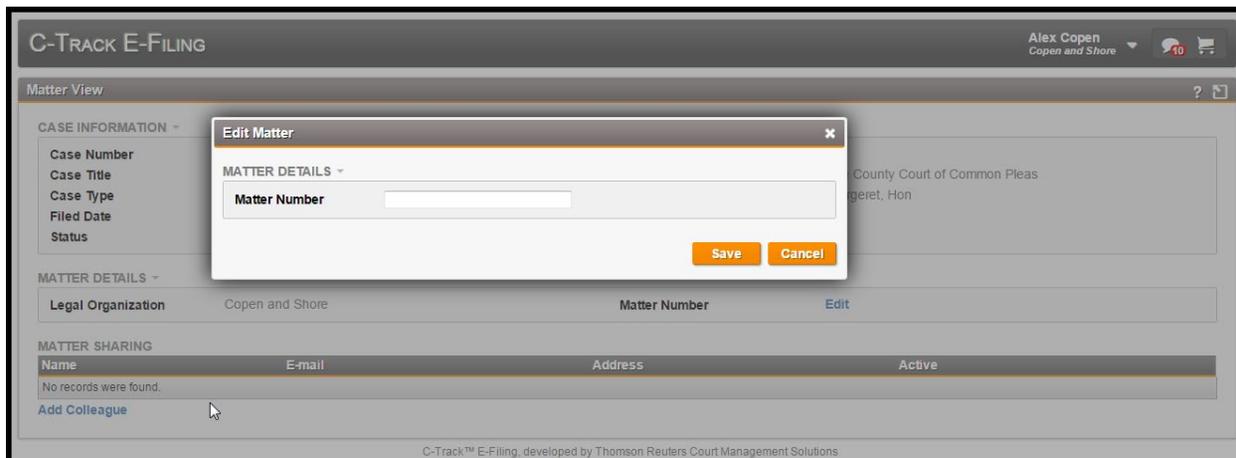
The **Matter View** screen has three containers. The **Case Information** container provides summary information about the case and is not editable.

The **Matter Details** container shows the **Legal Organization** to which the matter is associated and the **Matter Number**. The **Edit** link lets you edit the Matter Number.

The **Matter Sharing** display table shows the **Name**, **Email** address, mailing or physical **Address** and **Active** status of colleagues with whom you have shared a Matter. The **Add Colleague** link lets you share your Matters with other members of your Legal Organization.

- Click the **Edit** link in the **Matter Details** container.

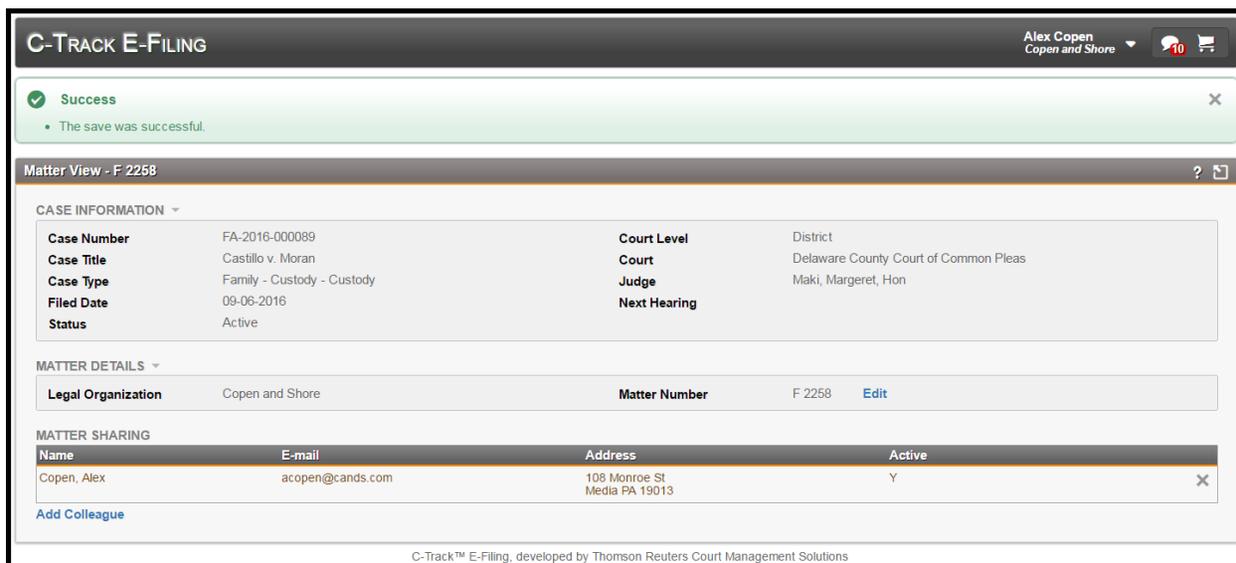
The **Edit Matter** window appears.



**Fig. 1.53: Edit Matter window**

- Enter a **Matter Number**.
- Click **Save**.

You return to the **Matter View** screen.



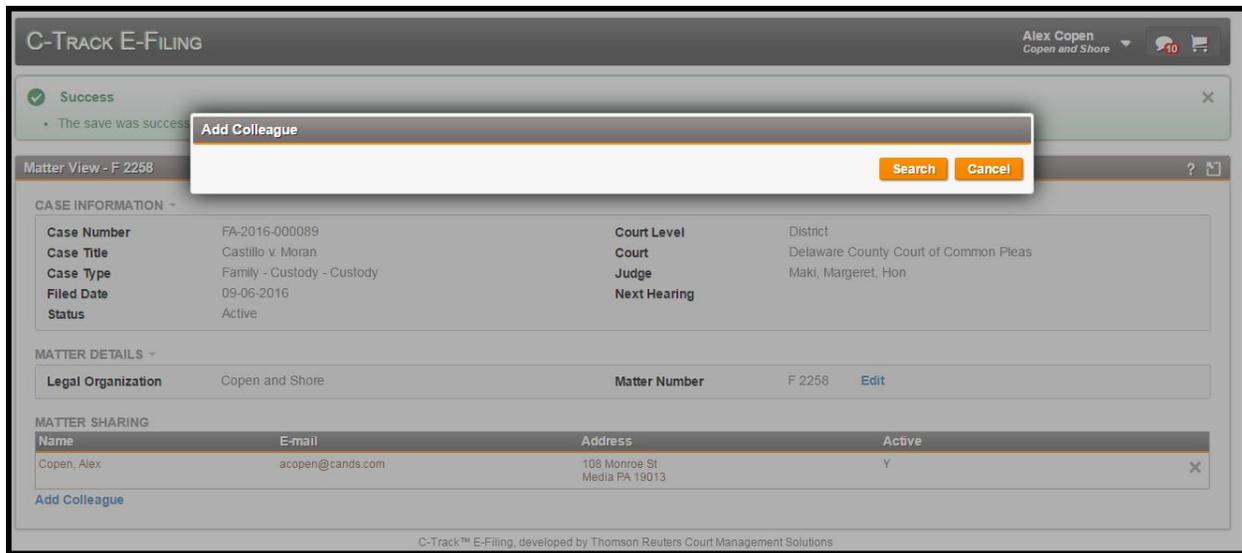
**Fig. 1.54: Matter View screen – successful save of Matter Number**

You have successfully added a Matter Number for a case filing. The **Green Success Notification** displays in the top content container, above the **Matter View** screen.

Note the Matter Number you entered appears in the **Matter Details** container and your user information displays in the **Matter Sharing** display table.

- Click the **Add Colleague** link at the bottom left of the **Matter Sharing** display table.

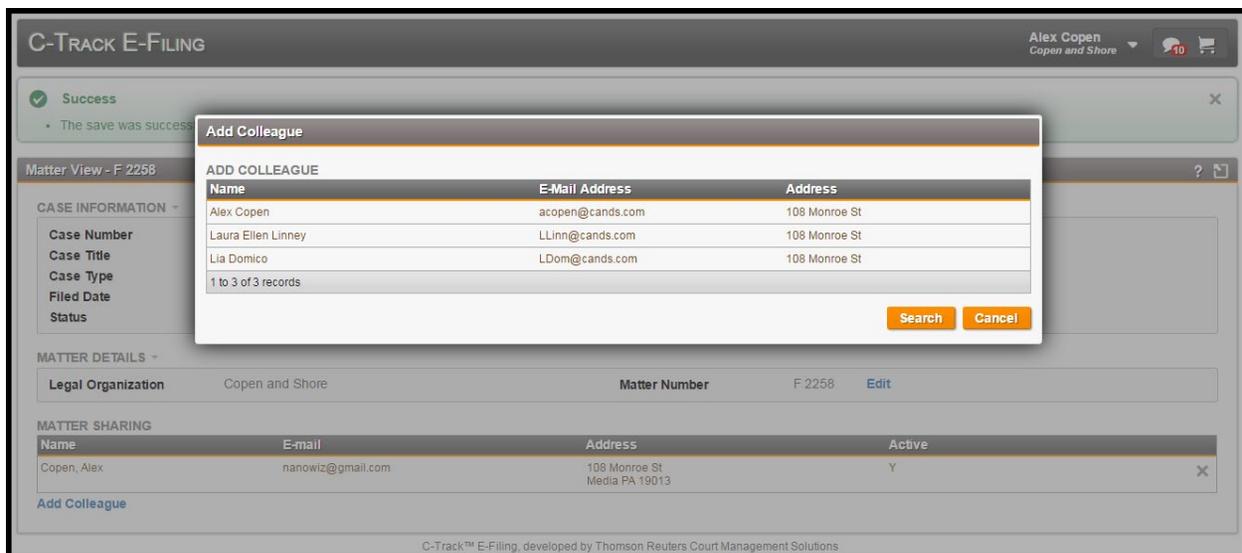
The **Add Colleague** window appears.



**Fig. 1.55: Add Colleague window**

8. Click **Search**.

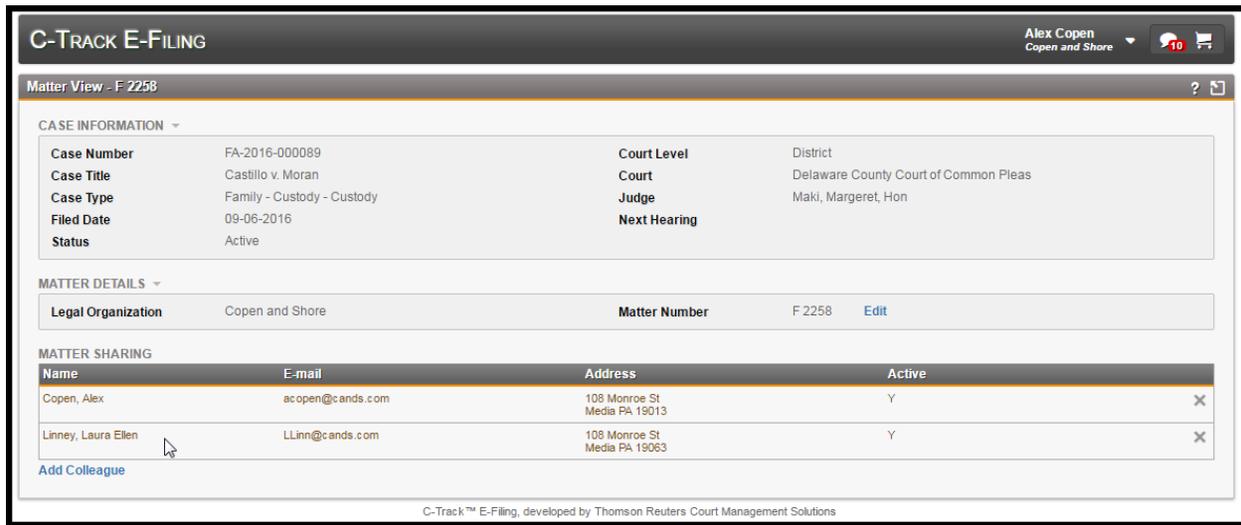
All colleagues that are members of the Legal Organization to which you are currently associated appear in the **Add Colleague** display table.



**Fig. 1.56: Add Colleague window – Legal Org members display**

9. Select a line item from the **Add Colleague** display table with whom you want to share this Matter.

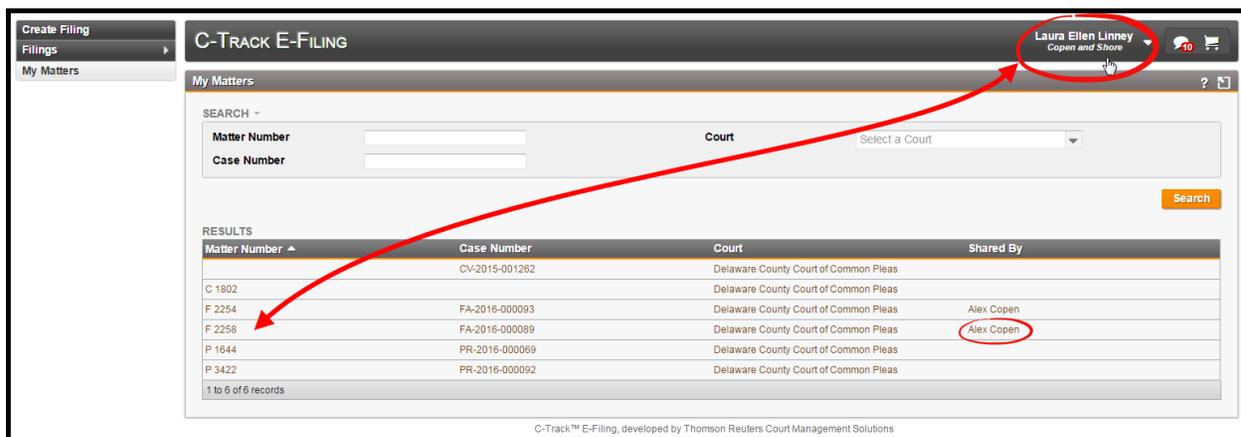
You return to the **Matter View** screen. The colleague you selected appears in the **Matter Sharing** display table.



**Fig. 1.57: Add Colleague window – Legal Org members display**

Repeat steps 7 through 9 to share this matter with additional colleagues. Note the **X** at the far right of any line item in the **Matter Sharing** display table lets you remove the permission to share the matter. You can remove yourself if you no longer need to be associated to a matter.

Now we see the **My Matters** screen for the colleague with who we have shared the Matter.



**Fig. 1.58: My Matters screen – Shared Matter**

Now we see the **My Matters** screen for the support staff of the original E-Filer. This user is authorized to access Matters created by the initial E-Filer as well as Matters shared with the E-Filer by other members of their Legal Organization who have shared Matters with them.

The screenshot shows the 'My Matters' screen in the C-Track E-Filing system. At the top right, a user profile dropdown menu is highlighted with a red circle, showing the name 'Lia Domico' and the email address 'Alex.Copen@CopenandShore.com'. Below the header, there is a search section with three input fields: 'Matter Number', 'Case Number', and 'Court'. The 'Court' field is a dropdown menu currently set to 'Select a Court'. A 'Search' button is located to the right of these fields. Below the search section, a table displays the search results. The table has four columns: 'Matter Number', 'Case Number', 'Court', and 'Shared By'. The results show six records, all from the 'Delaware County Court of Common Pleas'. The first record is 'C 1802' with case number 'CR-2016-003283', shared by 'Laura Ellen Linney'. The other records are 'c 5022', 'F 2254', 'F 2258', 'F 2262', and 'P 1644', all with case numbers starting with 'FA-2016-000069'. At the bottom of the table, it indicates '1 to 6 of 6 records'. The footer of the page reads 'C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions'.

Matter Number	Case Number	Court	Shared By
C 1802	CR-2016-003283	Delaware County Court of Common Pleas	Laura Ellen Linney
c 5022	FA-2016-000069	Delaware County Court of Common Pleas	
F 2254	FA-2016-000069	Delaware County Court of Common Pleas	
F 2258	FA-2016-000069	Delaware County Court of Common Pleas	
F 2262	FA-2016-000102	Delaware County Court of Common Pleas	
P 1644	PR-2016-000069	Delaware County Court of Common Pleas	

Fig. 1.59: My Matters screen – Support Staff

## 1.7 Create a New Case E-Filing

In this example we create a Filing of a new case. We are logged into the C-Track E-Filing site for an existing user who is an attorney associated to a Legal Organization – a law firm.

➤ **NOTE:** The Court determines the maximum file size of documents that can be upload in an e-Filing submission. Please check with the Court as larger documents may need to be uploaded in multiple parts.

1. From the home screen, click **Create Filing** from the left menu.

The **Create Filing** screen appears.

**Fig. 1.60: Create Filing** screen

The **Create Filing** screen has a single container, **Court Selection**. You can select a **Court** and **Filing Category**.

2. Select a **Court**.
3. Select a **Filing Category**. Here, we select New Case.

With the selection of New Case in the Filing Category field, a second container, **New Case**, is added to the screen.

**Fig. 1.61: New Case** container – Case Category, Type, Subtype, Filing Type entered Filing Subtype exposed

4. Enter a **Matter Number**. This is optional and only used for Legal Organizations that use them for internal communications. You must **Switch Association** to a **Legal Organization** to use this function.
5. Select **Case Category**.
6. Select **Case Type**.
7. Select **Case Subtype**.
8. Select **Filing Type**.
9. Select **Filing Subtype**.
10. Click **Next**.

➤ **NOTE:** Once you leave the **Create Filing** screen, the filing moves into Draft status in the E-File application. If you navigated to any other screen in the E-file application before you completed this filing, the filing is available to be completed through the **Filings > Draft** left menu path.

The **Filing Information** container appears below the left navigation menu and the **Filing Progress Indicator** appears below the top C-Track E-Filing banner. The **Party Information** indicator is highlighted and the **Party Information** container appears.

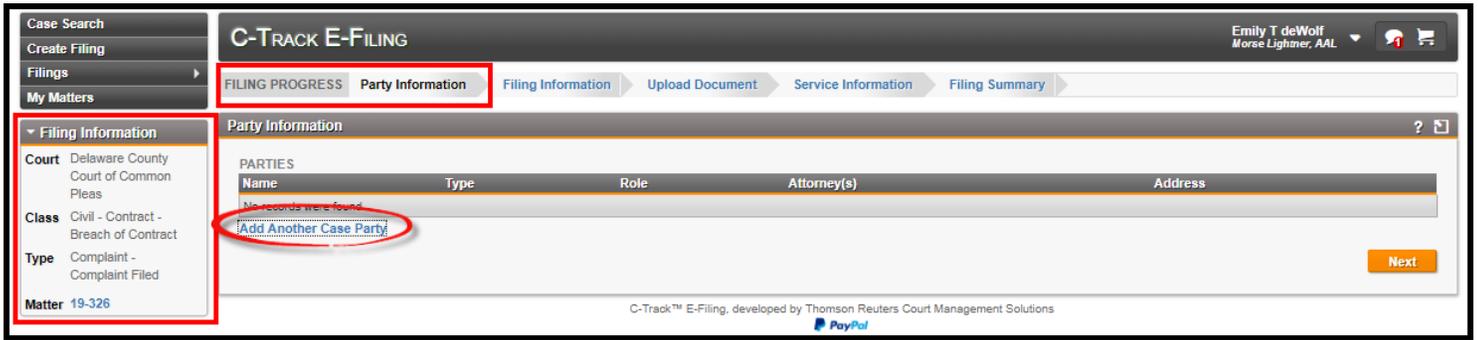


Fig. 1.62: Filing Progress– Party Information

11. Click the **Add Another Case Party** link at the bottom left of the Parties display table.

The **Party Information** window appears.

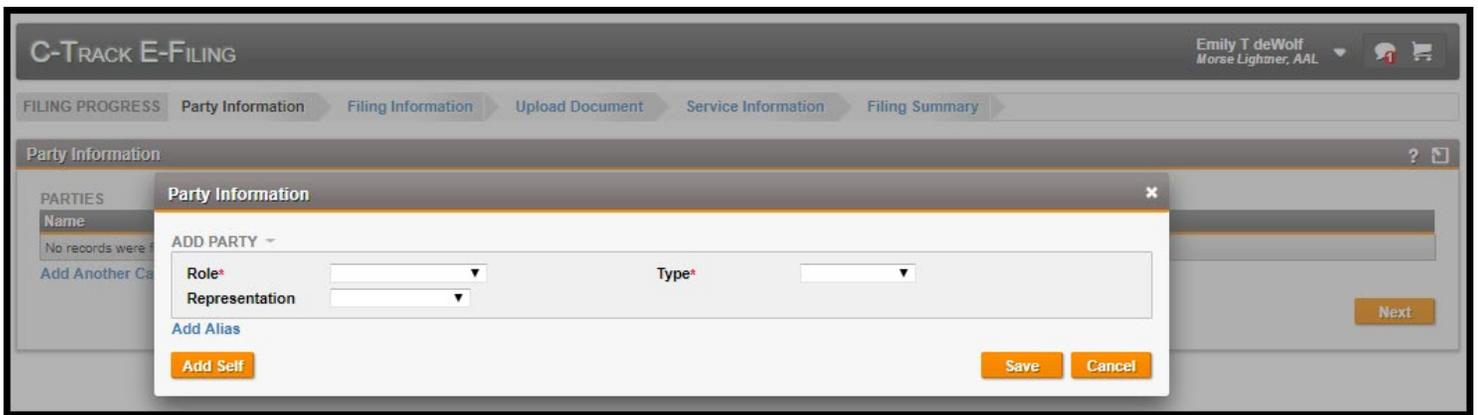


Fig. 1.63: Party Information window

The **Party Information** window has a single container, **Add Party**. This window expands with additional containers based upon the selections chosen in the **Role** and **Type** drop downs.

12. Select **Role**.

With the selection of Role, a second container, **Representer**, is added to the window.

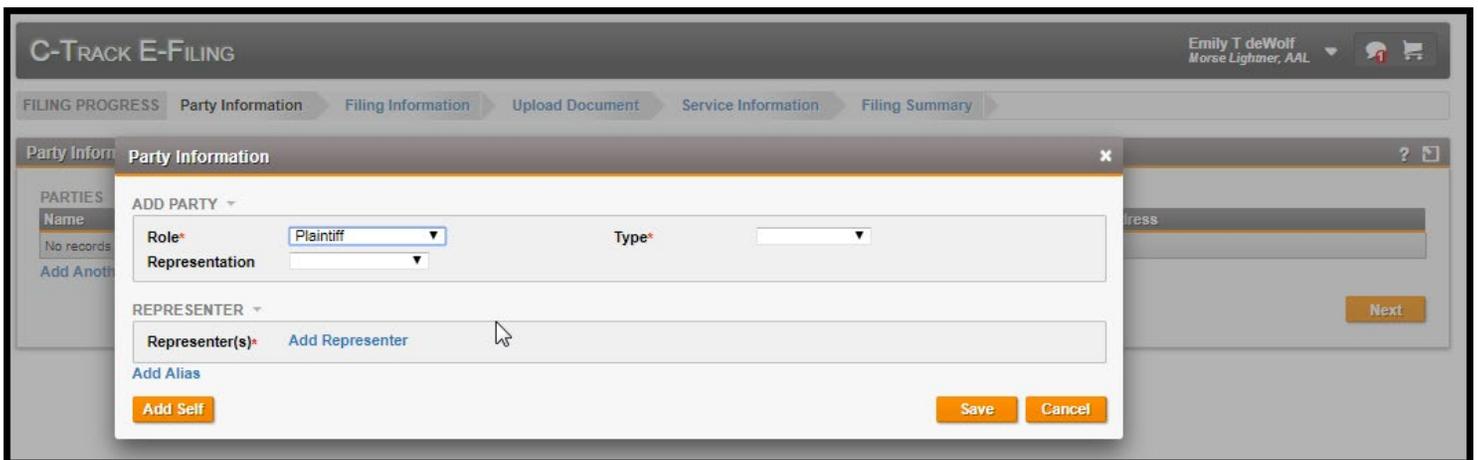


Fig. 1.64: Party Information window –containers added based on Party selections

13. Select **Type**, in the **Add Party** container.

With the selection of **Type**, a third container, **Name**, is added to the window.

**Fig. 1.65: Party Information** window –containers added based on **Type** selection

14. Select **Representation**, in the **Add Party** container.

15. Enter **Last Name**, in the **Add Party** container.

16. Enter **First Name**.

17. Click the **Add Representative** link from the **Representer** container.

The **Representer Search** window appears.

**Fig. 1.66: Representer Search** window

The **Representer Search** window has two containers to let you enter search criteria based on an attorney or law firm search. The kind of search is based on the selection of Representer **Type** – Attorney or Law Firm. Note the **Add Myself** button which eliminates the need to search for a representer and adds credentials based on your user login information.

18. Click **Add Self**.

The **Name** of the logged in user is entered as the attorney for this case party.

The screenshot shows the 'Party Information' window in the C-Track E-Filing system. The window is titled 'Party Information' and has a close button (X) in the top right. It contains several sections: 'ADD PARTY' with dropdowns for Role (Plaintiff), Representation (Attorney), and Type (Person); 'NAME' with text boxes for Last Name (Carter), First Name (JoAnne), and Middle Name; and 'REPRESENTER' with a list of representers (deWolf, Emily T) and an 'Add Representer' link. A red arrow points from the 'Add Self' button at the bottom left to the user's name 'Emily T deWolf Morse Lightner, AAL' in the top right corner of the application interface.

**Fig. 1.67: Party Information window – Add Self functionality**

Note the **X** that appears to the right of the **Representers** name. You can remove the representer by clicking the **X**. You do not confirm the deletion of information; the information is removed.

If a support staff user is filing on behalf of an Attorney, the Attorneys name appears as the Representer when the support staff selected **Add Myself** for representer.

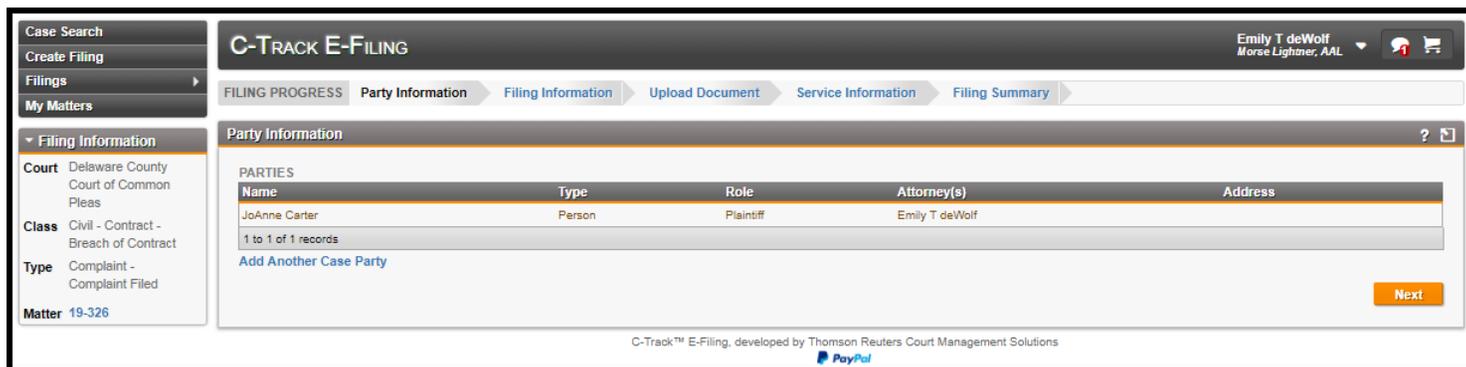
The screenshot shows the 'Party Information' window in the C-Track E-Filing system. The window is titled 'Party Information' and has a close button (X) in the top right. It contains several sections: 'ADD PARTY' with dropdowns for Role (Plaintiff), Representation (Attorney), and Type (Person); 'NAME' with text boxes for Last Name (Ranselear), First Name (Carl), and Middle Name (James); and 'REPRESENTER' with a list of representers (Linney, Laura Ellen) and an 'Add Representer' link. A red arrow points from the 'Add Representer' link to the user's name 'Lia Domico Laura Ellen Linney Coppen and Shore' in the top right corner of the application interface.

**Fig. 1.68: Party Information window – support staff associated through a Legal Organization files for Attorney**

19. Use the **Add Representer** link to search for and add additional attorneys for the party, if needed.

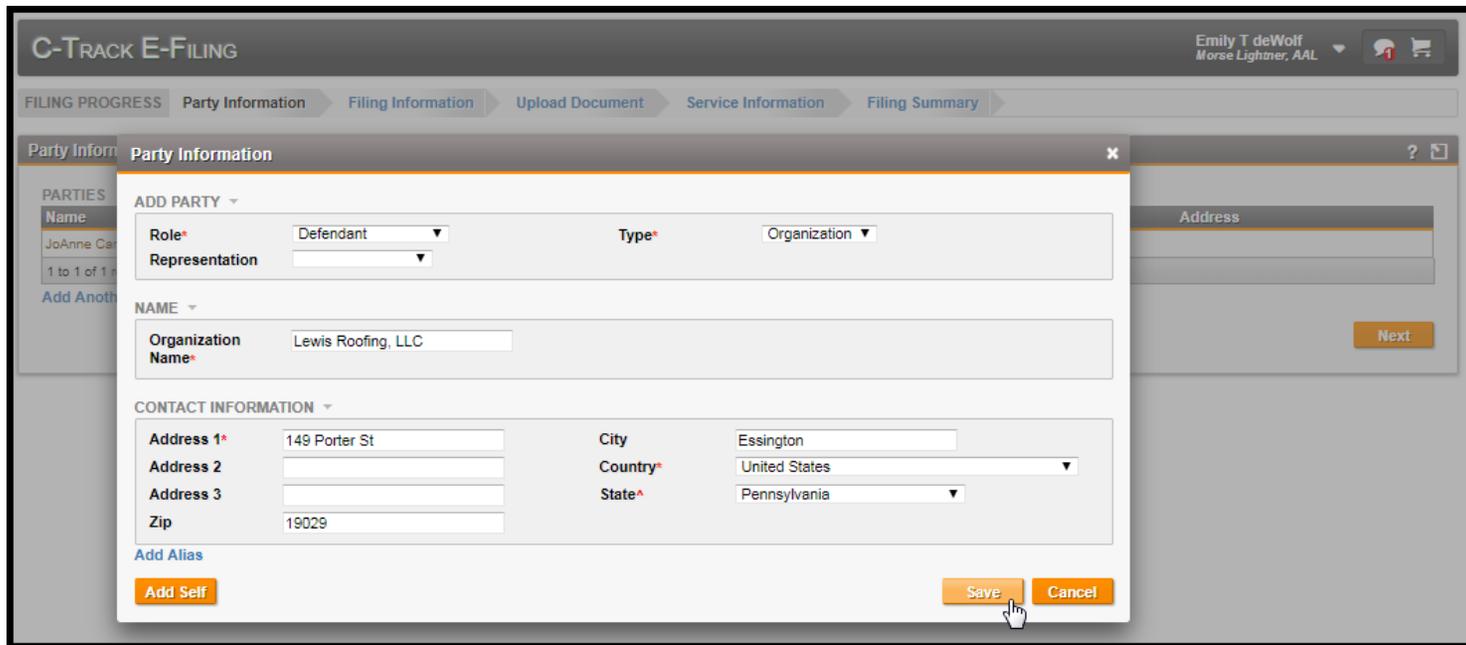
20. Click **Save**.

The Party appears in the **Parties** display table of the **Party Information** screen.



**Fig. 1.69: Filing Progress screen – Party added**

21. Click the **Add Another Case Party** link.
22. Select **Role**.
23. Select **Type**. Here, we select Organization. Note the containers present different fields to capture contact information.
24. Select **Representation**. Here, we select Self – representation. For this case party, you are providing the information that is known to you at the time of filing. You may not know if the party is retaining an attorney or law firm. This can be updated during the case proceedings, as needed.
25. Enter **Organization Name**.
26. Enter **Address**.



**Fig. 1.70: Party Information – Party added**

If an organization is known under another Name, use the **Add Alias** link below the bottom left of the **Contact Information** container to add Alias Information.

**Fig. 1.71: Party Information – Alias Information container**

27. Click **Save**.

You return to the **Party Information** screen with the case party information entered.

Name	Type	Role	Attorney(s)	Address
JoAnne Carter	Person	Plaintiff	Emily T deWolf	
Lewis Roofing, LLC	Organization	Defendant		149 Porter St Essington PA 19029

**Fig. 1.72: Filing Progress screen – Party added**

Repeat the **Add Another Case Party** process to add additional parties to the case, as needed.

28. Click **Next**.

The **Filing Information** Indicator is highlighted and **Filing Information** screen appears. Additionally, the filing has been moved to the **Draft Filing Queue** which you can access from the **Filings > Draft** left menu option. If you navigate away from the filing, you can return to it by selecting it from the **Filings** display table on the **Draft Filing Queue** screen.

The screenshot displays the 'Filing Information' screen in the C-Track E-Filing system. At the top, the 'FILING PROGRESS' indicator shows 'Filing Information' as the current step, highlighted with a red box. The user's name, 'Emily T. deWolf, Morse Lightner, AAL', is visible in the top right corner. The main content area is divided into three sections:

- DETAILS:** Includes a 'Comments' text area, checkboxes for 'Emergency' and 'Confidential', and an 'Amended' checkbox.
- FILER INFORMATION:** Features a 'Filed on Behalf of' dropdown menu with options 'Value', 'JoAnne Carter', and 'Lewis Roofing, LLC', and an 'Other Filed on Behalf of' text field.
- FILING FEES:** A table showing the fee structure:
 

Fee Name	Amount
Complaint Filed	\$208.24
<b>Total</b>	<b>\$208.24</b>

At the bottom, there is a 'Due From' dropdown, a 'Fees Not Required' checkbox, and a 'Comments' text area. Navigation buttons for 'Previous' and 'Next' are located at the bottom right. The footer includes the text 'C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions' and the PayPal logo.

Fig. 1.73: Filing Information screen

➤ **NOTE:** Each element of the **Filing Progress** Indicator is a link to navigate to the corresponding screen. You are not required to complete the screens in any particular order however, Filing Progress is organized in a logical manner to aid in the completion of all required information for a filing.

➤ **NOTE:** In Delaware County's current E-File workflow, you will see an **Additional Information** container. The information in the bundle includes **Money Damages, Class Action Suit, and Self-Represented**. Populate this information as necessary as per Delaware County Local Rules

The **Filing Information** screen has four containers. The **Details** container lets you indicate if the filing is an **Emergency**, an **Amended** filing or is **Confidential** by selecting any of the check boxes. You can also add a **Comment** to the filing that the Court will see.

Case types marked **Confidential** and electronic filings of a new case identified by E-Filers, when they select the **Confidential** check box, establish special security around those confidential cases. Confidential security means the case requires permissions at the user level for Court Personnel to view and maintain information about the case. Confidential security also means the case will not be returned in a search unless the user has authorized permission to view cases marked confidential. Attorneys who are added to the **E-File User Access** screen manually by Court Personnel or through automation will have access to search for and file on Confidential cases. An E-Filer who is not associated to the case cannot search for, nor electronically file on, a Confidential case, even if they know the case number.

		Public Case	Confidential Case
User Not on EF User Access List	Search / Access Case	✗	✗
	E-File into Case	✓	✗
User on EF User Access List	Search / Access Case	✓	✓
	E-File into Case	✓	✓

**Fig. 1.74: Confidential controls**

The **Filer Information** container lets you identify the entity(s) for whom you are filing.

The **Filing Fee** container displays the court fee for the filing type.

The **Filing Fees** container identifies the **Due From** party and also lets you indicate circumstances where fees are not required (must comply with Delaware County Rules).

The **Additional Information** container lets you specify additional Delaware County case specific information.

The **Previous** button navigates back to the **Party Information** screen.

The **Next** button saves information you have entered and navigates to the **Upload Document** screen.

- 29. Select the check box(es) for parties for whom you are filing.

**C-TRACK E-FILING** Emily T deWolf  
Morse Lightner, AAL

FILING PROGRESS Party Information **Filing Information** Upload Document Service Information Filing Summary

**Filing Information** ?

**DETAILS**

Comments

Emergency Confidential   Amended

**FILER INFORMATION**

Filed on Behalf of Value

- JoAnne Carter
- Lewis Roofing, LLC

Other Filed on Behalf of

**FILING FEES**

Fee Name	Amount
Complaint Filed	\$208.24
<b>Total</b>	<b>\$208.24</b>

**FILING FEES**

Due From\* JoAnne Carter Fees Not Required

Comments

Previous Next

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**Fig. 1.75: Filing Information** screen – selections complete

30. Click **Next**.

The **Upload Document** screen appears.

**DELAWARE COUNTY, PENNSYLVANIA E-FILING**

Emily T. deWolf  
Moree Lightner, AAL

**Information**

- The uploaded document cannot exceed 25 megabytes. If the document does exceed 25 megabytes, you must upload the document in 'Multiple Parts' using the Add Another link.
- When e-filing a motion or petition, to attach a Petition/Motion Cover Sheet then you must add it as an Associated Filing. You are able to add an Associated Filing from the Filing Summary screen.
- If you need to attach a Supreme Court Cover Sheet then you must add it as an Associated Filing. You are able to add an Associated Filing from the Filing Summary screen.
- I have uploaded all of the required attachments, and I certify that this filing complies with the provisions of the Public Access Policy of the Unified Judicial System of Pennsylvania: Case Records of the Appellate and Trial Courts that require filing confidential information and documents differently than non-confidential information and documents.

FILING PROGRESS **Party Information** Filing Information **Upload Document** Service Information Filing Summary

**Upload Document**

**DOCUMENT**

Name Initial Filing - Appeal File<sup>^</sup> Choose File No file chosen

Exclude from eService  Comments

Request Confidentiality<sup>^</sup>  Confidential Reason<sup>^</sup>

Add Another

**COMPLIANCE**

I have read and accept the Compliance language above.\*

Previous Next

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**Fig. 1.76: Upload Document screen**

Before continuing to the Service Information screen, you must click the checkbox agreeing to the Delaware County document upload Compliance.

➤ **NOTE:** The Court determines the maximum file size of documents that can be upload in an e-Filing submission. Please check with the Court as larger documents may need to be uploaded in multiple parts.

The **Upload Document** screen has a single container. The **Documents** container lets you upload documents that are electronically transferred to the Court when you submit the filing. You can specify **Request Confidential** and **Exclude from Service** for the document. You must identify a **Confidential Reason** when requesting a document remain confidential. You can also add a **Comment** about the document.

The **Compliance** container contains a checkbox that *must* be checked whenever a file has been uploaded to comply with Delaware County's Local Rule for uploading documents.

The **Add Another** link lets you upload as many documents as needed. If the document you attach exceeds the file size limit established by the Court, a warning message shows. You must save larger documents in parts or sections and use the Add Another link to upload all documents of the filing.

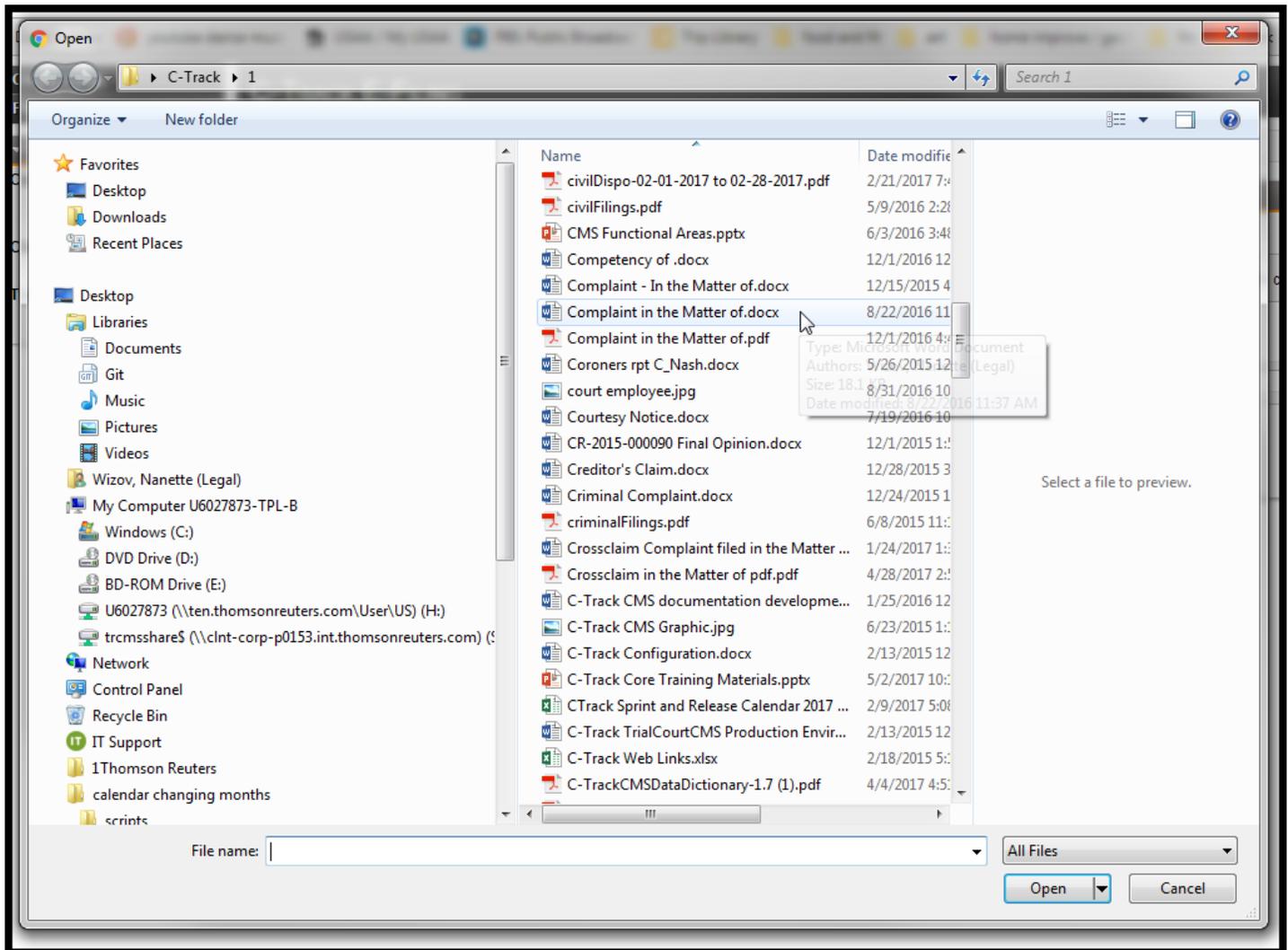
\*Document Specifications\*

- |  |
|--|
| 1. Documents must use the universal PDF standard   |
| 2. Documents shall not be more than 25 megabytes (mb)  |
| 3. Files that exceed 25 mb must be split into multiple files not to exceed 25 (mb)                   |
| 4. Color shall be black and white  |
| 5. Resolution shall be 300 dpi   |
| 6. Document size is limited to 8 ½ inch by 11 inches   |
| 7. Any font that is not part of the Microsoft default font list must be embedded in the PDF document |
| 8. PDF properties (title, author, subject, and keywords) should be removed from the document         |
| 9. Documents cannot be password protected or encrypted   |
| 10. Document names shall not include special characters such as /:*?<>                               |

31. Click **Browse** or **Choose File**.

➤ **NOTE:** Depending upon the browser you use to access the C-Track E-File application, elements within the application may have a slightly different appearance. For instance, if you use Internet Explorer, you see a **Browse** button which allows you to navigate to a location on your PC to a file you want to upload.

A browser window opens to allow you to navigate to a file on your PC that you want to upload.



**Fig. 1.77: Open browser window**

32. Select the file you want to upload.
33. Click **Open**.

You return to the **Upload Document** screen. The document title appears to the right of the **Choose File** button.

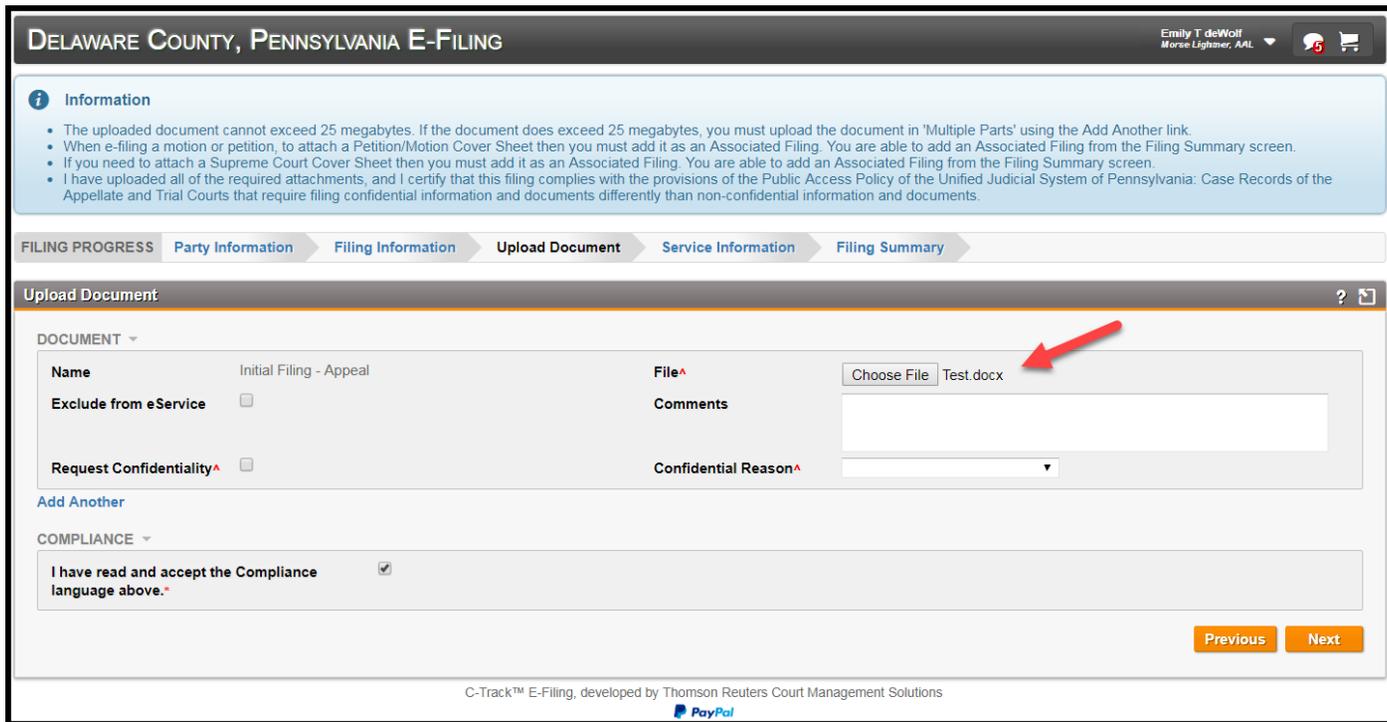


Fig. 1.78: Upload Document screen – file selected

Before continuing to the Service Information screen, you must click the checkbox agreeing to the Delaware County document upload Compliance.

34. Click **Next**.

The **Service Information** screen appears.

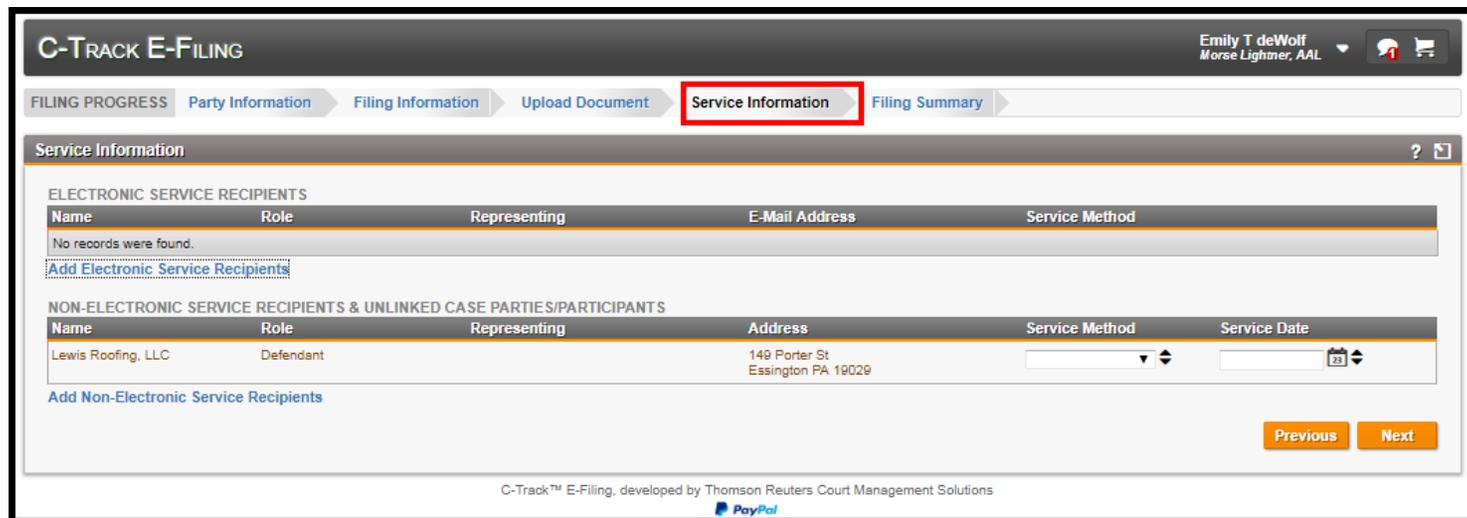


Fig. 1.79: Service Information screen

The **Service Information** screen has three containers. The **Electronic Service Recipients** container displays parties or participants that have an email address on file in the CMS application or in the C-Track E-Filing application. The **Add Electronic Service Recipients** link lets you send email notification to other e-filers who are not parties or participants on the case, if needed. If the entity is not found through a search, you can add them with functionality that captures the Name and address of a Non E-Filer.

The **Conventional Service Recipients** container will always display a **Service Method** of Not Served (or 'Served, see above' that is applicable in Pro Se email notification scenarios) due to Delaware County Local Rules.

The **Add Non-Electronic Service Recipients** link lets you send email notification to other entities by adding the name and address for conventional (mail) service.

➤ **NOTE:** The **Apply to All** icon  that appears to the right of the **Service Method** and **Service Date** fields lets you populate the fields once, and select the icon if the selection applies to all Recipients.

➤ The  **Date Picker** icon lets you access a Calendar which lets you select a month and day to populate the field. Additionally, C-Track E-Filing lets you enter the letter C in any Date field to enter today's day in the field. You can add days in the future by using the + and numeral. For example, C+30 would populate the field with the calendar day 30 days from today's date.

- 35. Select **Service Method**.
- 36. Enter **Service Date**.

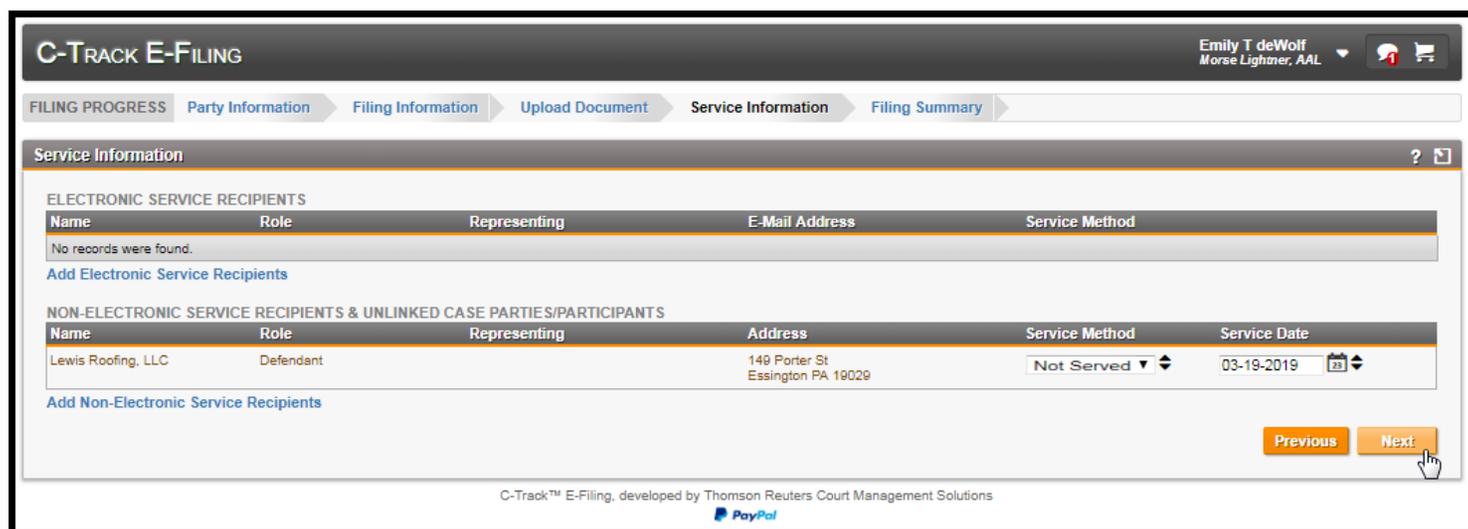


Fig. 1.80: Service Information screen - complete

- 37. Click **Next**.

The **Filing Summary** screen appears.

**C-TRACK E-FILING** Emily T deWolf  
Morse Lightner, AAL

FILING PROGRESS [Party Information](#) [Filing Information](#) [Upload Document](#) [Service Information](#) **Filing Summary**

### Filing Summary

**CASE DETAILS**

Court	Delaware County Court of Common Pleas
Case Category	Civil
Case Type	Contract
Case Subtype	Breach of Contract

**FILING INFORMATION**

Filing Number	10062	Type	Complaint - Complaint Filed
Filed on Behalf of	JoAnne Carter	Comments	
Other Filed on Behalf of		Emergency	
Amended		Confidential	

**PARTY INFORMATION**

Name	Type	Role	Address	Attorney(s)
JoAnne Carter	Person	Plaintiff		Emily T deWolf
Lewis Roofing, LLC	Organization	Defendant	149 Porter St Essington PA 19029	

**DOCUMENTS**

Name	Request Confidential	Confidential Reason	Exclude from eService	Comments
Complaint - Complaint Filed				

**ELECTRONIC SERVICE RECIPIENTS**

Name	Role	Representing	E-Mail Address	Service Method
No records were found.				

**NON-ELECTRONIC SERVICE RECIPIENTS & UNLINKED CASE PARTIES/PARTICIPANTS**

Name	Role	Representing	Address	Service Method	Service Date
Lewis Roofing, LLC	Defendant		149 Porter St Essington PA 19029	Not Served	03-19-2019

**FILING FEES**

Fee Name	Amount
Complaint Filed	\$208.24
<b>Total</b>	<b>\$208.24</b>

**FILING FEES**

Due From	JoAnne Carter	Fees Not Required
Comments		

[Edit Filing](#) [Add Associated Filing](#) [Add To Cart](#) [Delete This Filing](#)

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**Fig. 1.81: Filing Summary screen**

The **Filing Summary** screen provides seven containers with a summary for all information entered on the previous E-Filing screens.

The **Edit Filing** button navigates back to beginning of the Filing Progress – the **Party Information** screen where you can edit information or use the **Next** button to proceed through the screen(s) to the information that needs editing.

The **Add Associated Filing** button lets you add a separate filing that belongs to the same case. Associated filings appear as separate Registry of Action or Docket Entries on the case.

The **Add To Cart** button navigates to the **Cart** screen where you can review a summary of all filings in the **Cart** and see costs for any filings that are assessed.

The **Delete This Filing** moves the filing to the **Draft** queue where you can select a check box and delete the filing.

38. Click **Add To Cart**.

The **Cart** screen appears.

Fig. 1.82: Cart screen

The **Cart** screen has two containers: the **Summary** container shows the **Number of Filings** to be submitted and the **Total** cost.

The **Filings** container shows the **Court** in which the filings will be processed. **Case Number** appears for filings on an existing case. Line items with no case number indicate a new case filing. The case number is auto-generated in the C-Track CMS application. When you receive confirmation of a successful submission of the filing of a new case, you also receive the case number. The **Matter Number** is a configurable number and can be used by Legal Organizations and filers from legal organizations as an internal identifier. This lets Legal Organization filers with the proper security permission view filings by other members of the Legal Organization. The Filing Item(s) show the Registry of Action or Docket Entry that is added to the case in the C-Track CMS application when the filing is processed successfully. **Documents** indicate the number of documents attached or uploaded to the filing and **Fees** represent the cost the Court assesses for each filing.

You can remove filings from the **Cart** by clicking the **X** at the far right of any line item. When you remove a filing from the **Cart** a **Confirm** window requires that you **OK** the removal. The filing is moved to the **Draft** queue, found through the left navigation menu, following the path **Filings > Draft**.

Note the **Information** message that appears above the **Cart** screen provides payment instruction information. The **Cart** icon



in the far-right top navigation bar reflects the addition of the filing to the Cart. Also note the **E-Filing Terms & Conditions** link at the bottom of the **Filings** container. Terms and Conditions information is also available when you register as an E-Filer.

### 39. Click **Submit Filings**.

Depending upon your Courts business process, you navigate to a payment screen where payment method information is captured. Once the information is successfully saved and processed, the **Submission Confirmation** screen appears.

**C-TRACK E-FILING** Emily T deWolf  
Morse Lightner, AAL

**Information**

- Your electronic filings have been submitted for review and processing.

**Submission Confirmation**

**DETAILS**

E-File Confirmation # 100581553025637789 Submitted Date 03-19-2019 04:01 PM  
Payment Confirmation # 7XK10813UND13250A

**FILINGS**

Court	Case Number	Matter Number	Filing Number	Filing Item(s)	Documents	Fees
Delaware County Court of Common Pleas		19-326	10062	Complaint - Complaint Filed	1	\$208.24
<b>Total</b>						<b>\$208.24</b>

**Print**

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PayPal

**Fig. 1.83: Submission Confirmation** screen

You have successfully submitted as electronic filing for a new case in the C-Track E-Filing application.

The **Submission Confirmation** screen has two containers: the Details container provides the **E-File Confirmation Number**, the **Submission Date** and the **Payment Confirmation Number**.

The **Filings** container shows an additional column to provide the **Filing Number** for each filing.

The **Print** button opens a separate browser window and lets you save or print a pdf of the **Submission Confirmation**. Additionally, the information is retained in the **Submitted** Queue and can be accessed at any time by following the menu path **Filings > Submitted** from the left navigation menu.

The **Cart** icon  in the top right screen banner, which had a red number showing the number of filings in the Cart throughout the process of creating a new case filing, is now empty.

Processing of the Submitted Filing happens through the C-Track CMS application and is performed by OJS personnel. Once processing is completed information about the success or failure of the submission will be sent back to your E-Filer Filing

queue. Information also appears in the **Notifications** icon  in the top right screen banner of every **C-Track E-Filing** screen.

Once the Court has processed the filing, you receive email notification regarding the filing similar to the notice shown below.

**Filing Submission** Inbox x

coreefile@thomsonreuters.com  
to ewolf

C-Track E-Filing  
This is a notice to inform you that the filings, confirmation number 100581553025637789, have been submitted on 03-19-2019 04:01 PM. You can view the filings [here](#).

REF: 100581553025637789

Do not respond to this system-generated e-mail notification. For help with technical problems, please contact the system administrator.

**Fig. 1.84: Email Confirmation**

The email you receive displays according to the specific email application with which you registered your E-File account.

If you click the view link from the email, you may be prompted to log into the E-Filing application. Once you are logged into E-File, the **Filing Summary** screen displays.

**C-TRACK E-FILING** Filing Summary

**CASE DETAILS**

- Court:** Delaware County Court of Common Pleas
- Case Category:** Civil
- Case Type:** Contract
- Case Subtype:** Breach of Contract

**FILING INFORMATION**

- Filing Number:** 10062
- Filed on Behalf of:** JoAnne Carter
- Other Filed on Behalf of Amended:**
- Type:** Complaint - Complaint Filed
- Comments:** Emergency Confidential

**PARTY INFORMATION**

Name	Type	Role	Address	Attorney(s)
JoAnne Carter	Person	Plaintiff		Emily T deWolf
Lewis Roofing, LLC	Organization	Defendant	149 Porter St Essington PA 19029	

**DOCUMENTS**

Name	Request Confidential	Confidential Reason	Exclude from eService	Comments
Complaint - Complaint Filed				

**ELECTRONIC SERVICE RECIPIENTS**

Name	Role	Representing	E-Mail Address	Service Method
No records were found.				

**NON-ELECTRONIC SERVICE RECIPIENTS & UNLINKED CASE PARTIES/PARTICIPANTS**

Name	Role	Representing	Address	Service Method	Service Date
Lewis Roofing, LLC	Defendant		149 Porter St Essington PA 19029	Conventional	03-19-2019

**FILING FEES**

Fee Name	Amount
Complaint Filed	\$208.24
<b>Total</b>	<b>\$208.24</b>

**FILING FEES**

- Due From:** JoAnne Carter
- Comments:** Fees Not Required

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**Fig. 1.85: Filing Summary** screen

Additionally, any party that was served electronically with a successfully processed filing receives an email.

Once the filing is process by the Court, another email is sent. When the case is accepted and the case number is automatically generated, the number is included in the email.

**Filing Approval - Case No. CV-2019-000003 - Matter No. 19-326** Inbox x

coreefile@thomsonreuters.com  
to: ewolf

C-Track E-Filing

This is a notice to inform you that the filings filed in CV-2019-000003 (Matter No. 19-326) have been accepted by the Clerk on 03-19-2019 04:01 PM. You can view this filing [here](#).

Clerk's Comments:

REF: 100581553025637789

Do not respond to this system-generated e-mail notification. For help with technical problems, please contact the system administrator.

**Fig. 1.86: Email Approval** to E-Filer

## 1.8 Submit an E-Filing on an existing case

In this example we create an e-filing to an existing case.

1. From the home screen, click **Create Filing** from the left menu.

The **Create Filing** screen appears.

Fig. 1.87: Create Filing screen

2. Select a **Court**.
3. Select a **Filing Category**. Here, we select Existing Case.

The **Existing Case** container is added to the screen.

Fig. 1.88: Create Filing screen – Existing Case container is added

4. Enter **Case Number**.

C-TRACK E-FILING Nina Lee Winslow

Create Filing

COURT SELECTION ▾

Court\* Delaware County Court of Common Pl...  
Filing Category\* Existing Case ▾

EXISTING CASE ▾

Case Number\* CV-2017-000424  
Filing Type\* ▾  
Filing Subtype\* ▾

Next

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**Fig. 1.89: Create Filing screen – Existing Case error**

If you enter a Case number for a case that does not exist or a number for a Confidential case upon which you are not permitted to file, the **Case Number** field displays with a red outline and the **Filing Type** and **Filing Subtype** fields do not populate with drop down values, as shown above.

5. Select **Filing Type**.
6. Select **Filing Subtype**.

C-TRACK E-FILING Nina Lee Winslow

Create Filing

COURT SELECTION ▾

Court\* Delaware County Court of Common Pl...  
Filing Category\* Existing Case ▾

EXISTING CASE ▾

Case Number\* CV-2017-000422  
Filing Type\* Discovery ▾  
Filing Subtype\* Request for Admissions by ▾

Next

C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions  
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The Green outline means the system recognizes the Case Number as an existing case.

**Fig. 1.90: Create Filing screen – Existing Case**

7. Click **Next**.

The **Filing Information** screen appears. Additionally, the filing has been moved to the **Draft Filing Queue** which you can access from the **Filings > Draft** left menu option. If you navigate away from the filing, you can return to it by selecting it from the **Filings** display table on the **Draft Filing Queue** screen.

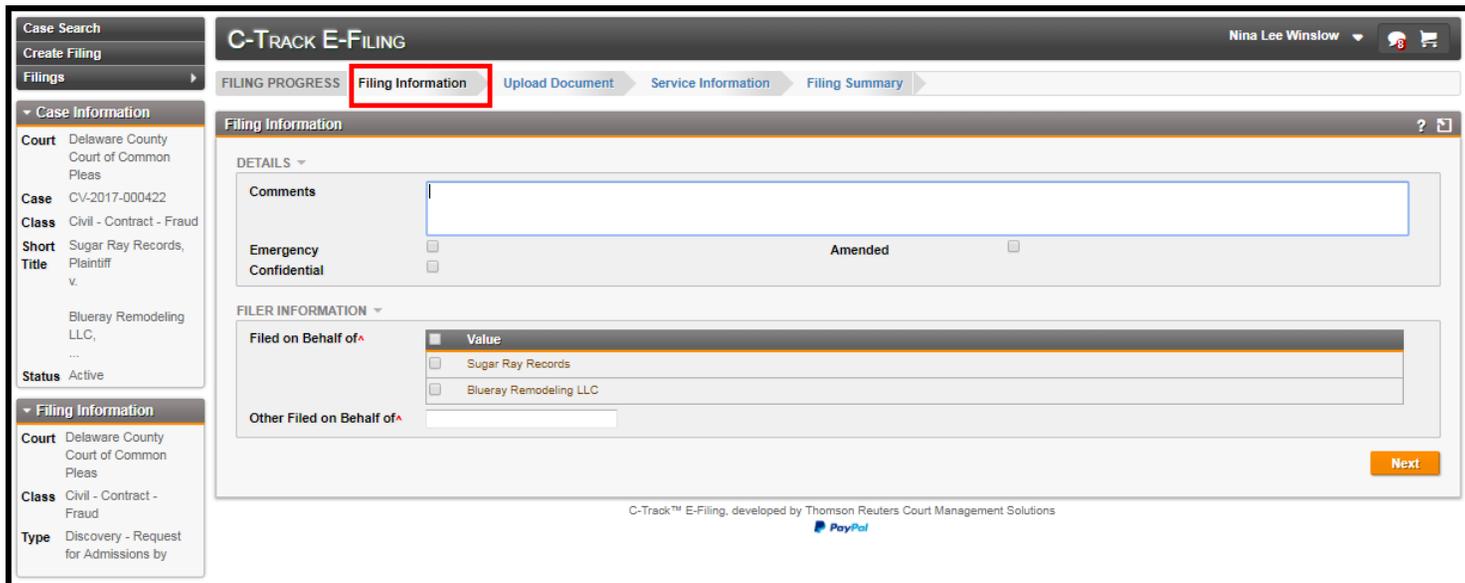


Fig. 1.91: Filing Information screen

Since we are e-filing on an existing case, Party information has already been entered on the case. We see the **Case Information** container in the left menu. Additionally, the **Filing Progress** Indicator does not contain a Party Information element. Also, a **Filing Fee** container appears when the Court assesses a fee for this filing type.

The **Details** container lets you indicate if the filing is an **Emergency**, an **Amended** filing or is **Confidential** by selecting any of the check boxes. The **Confidential** check box here makes the filing itself confidential, not the case as a whole. You can also add a **Comment** to the filing.

The **filer Information** container lets you identify the entity(s) for whom you are filing.

8. Select a **Filed on Behalf of** check box in the **Filer Information** container.
9. Complete other information, as needed.
10. Click **Next**.

The **Upload Document** screen appears.

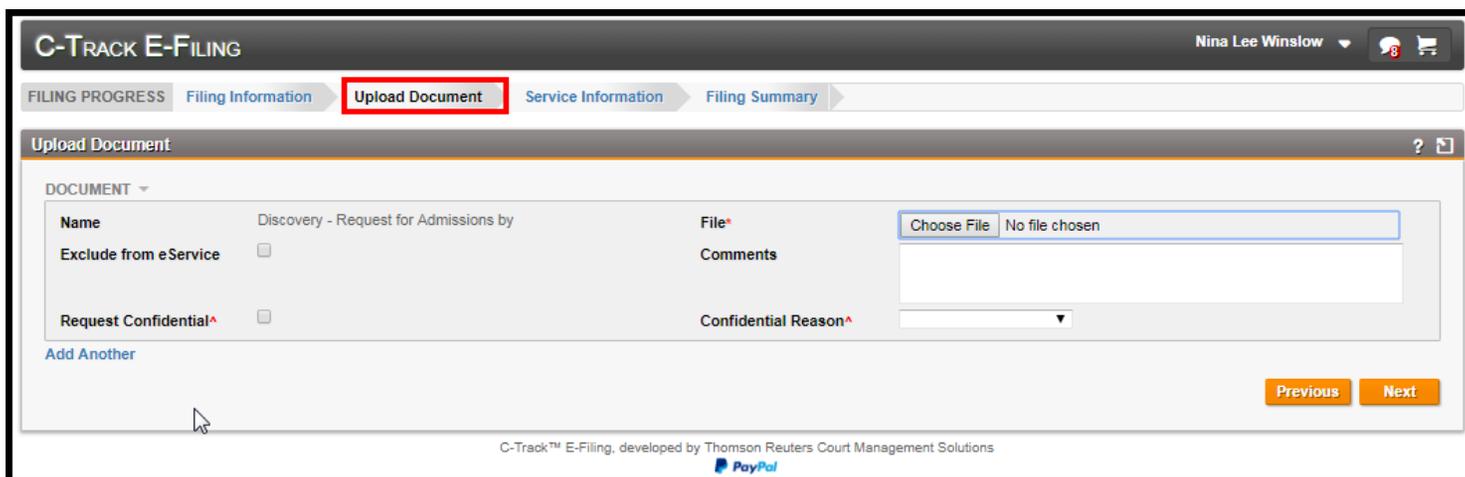


Fig. 1.92: Upload Document screen

When you specify **Request Confidential**, you must identify a **Confidential Reason** – here you are specifying the Document itself, as opposed to the whole case or the filing, is Confidential.

11. Click **Choose File**.

A browser window opens to allow you to navigate to a file on your PC that you want to upload.

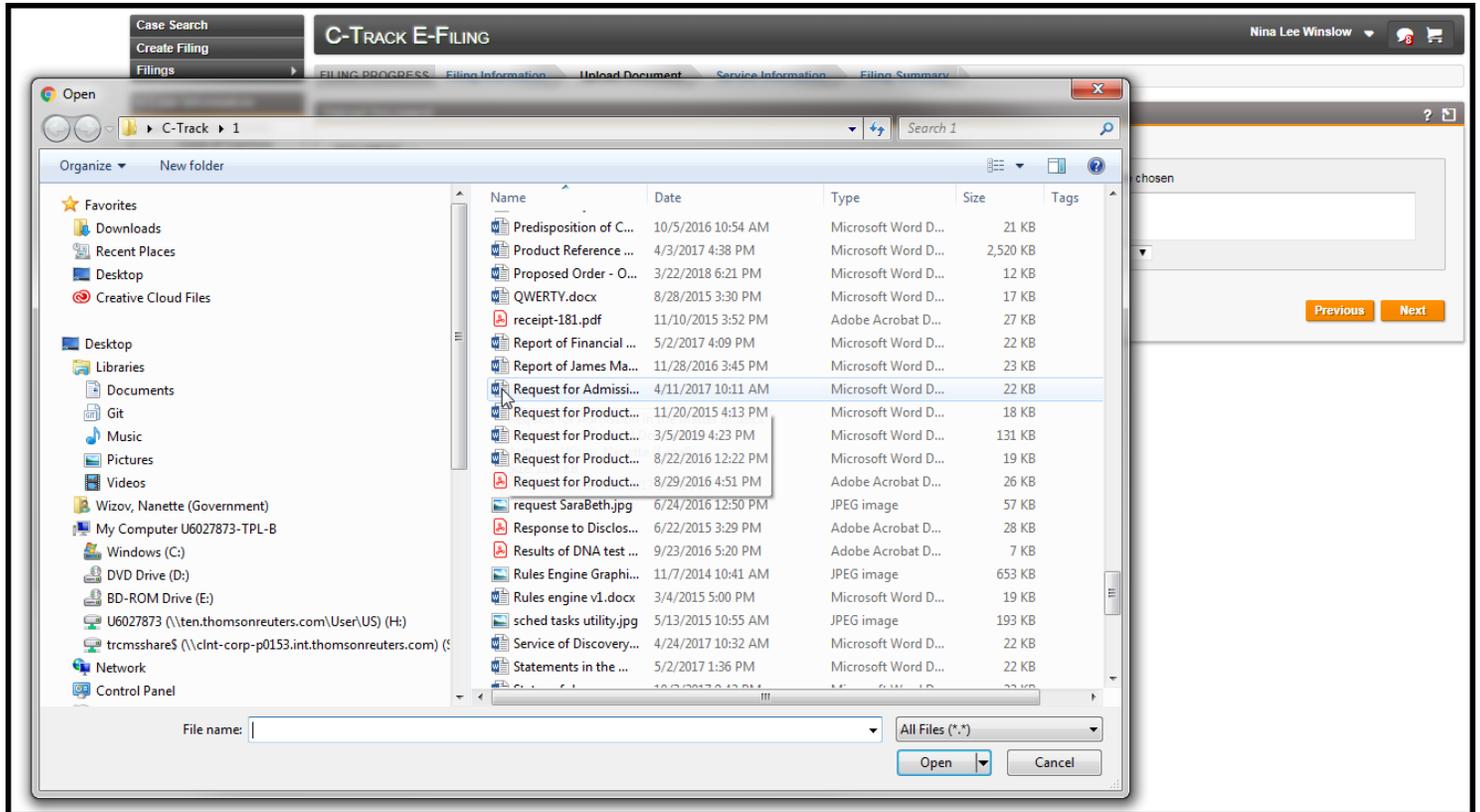


Fig. 1.93: Open browser window

12. Select the file you want to upload.
13. Click **Open**.

➤ **NOTE:** The Court determines the maximum file size of documents that can be upload in an e-Filing submission. Please check with the Court as larger documents may need to be uploaded in multiple parts.

If the document you attach exceeds the file size limit established by the Court, a warning message appears. You must save larger documents in parts or sections and use the **Add Another** link at the bottom left of the **Upload Document** container to upload all documents of the filing.

You return to the **Upload Document** screen. The document title appears to the right of the **Choose File** button.

C-TRACK E-FILING Nina Lee Winslow

FILING PROGRESS Filing Information Upload Document Service Information Filing Summary

Upload Document

DOCUMENT

Name	Discovery - Request for Admissions by	File*	Choose File Request for Admission in the Matter of.docx
Exclude from eService	<input type="checkbox"/>	Comments	
Request Confidential^	<input type="checkbox"/>	Confidential Reason^	

Add Another

**Previous** **Next**

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**Fig. 1.94: Upload Document** screen – file selected

14. Complete any Confidentiality information, as needed.

Before continuing to the Service Information screen, you must click the checkbox agreeing to the Delaware County document upload Compliance.

15. Click **Next**.

The **Service Information** screen appears.

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FILING PROGRESS Filing Information Upload Document Service Information Filing Summary

Service Information

ELECTRONIC SERVICE RECIPIENTS

Name	Role	Representing	E-Mail Address	Service Method
No records were found.				

Add Electronic Service Recipients

NON-ELECTRONIC SERVICE RECIPIENTS & UNLINKED CASE PARTIES/PARTICIPANTS

Name	Role	Representing	Address	Service Method	Service Date
Blueray Remodeling LLC	Defendant	Self-Represented	208 W Morris St Essington 19029		
Crowe, Daniel	Attorney	Sugar Ray Records (Plaintiff)	208 W Orange St Media 19063		

Add Non-Electronic Service Recipients

**Previous** **Next**

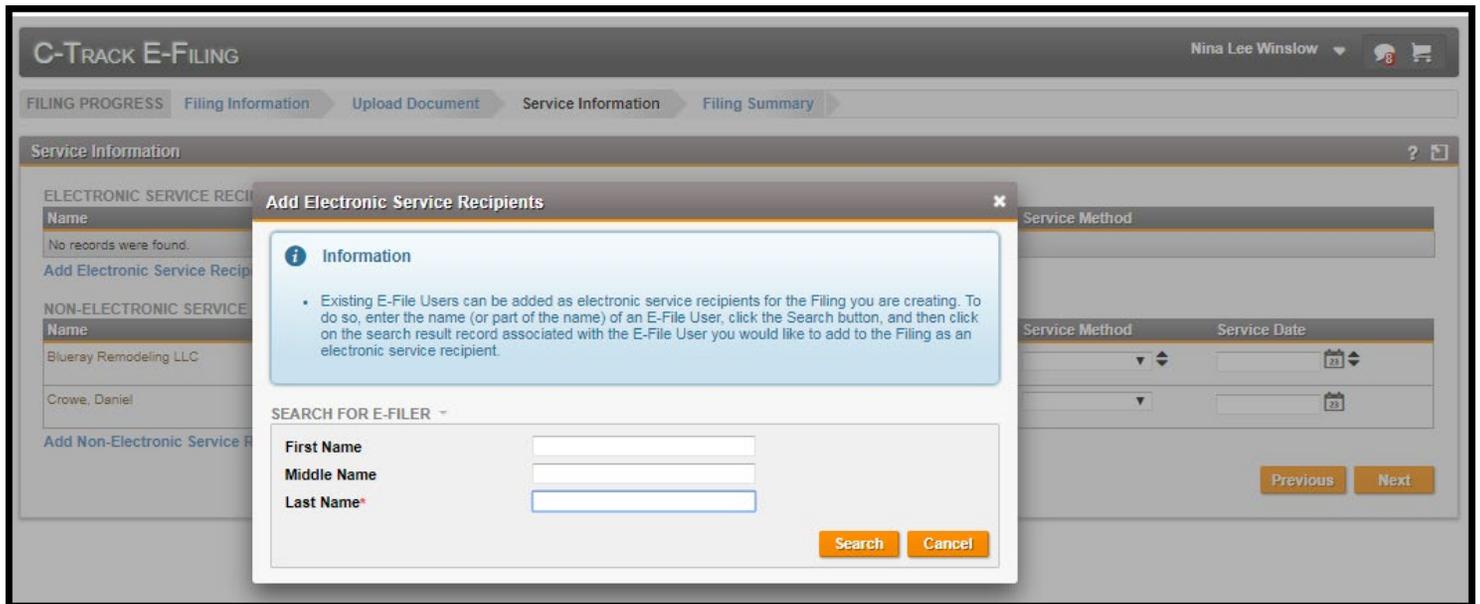
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**Fig. 1.95: Service Information** screen

Here, the filer wants to include electronic service for an attorney who is not a party or participant to this case but is a register e-File user.

16. Click the **Add Electronic Service Recipients** link.

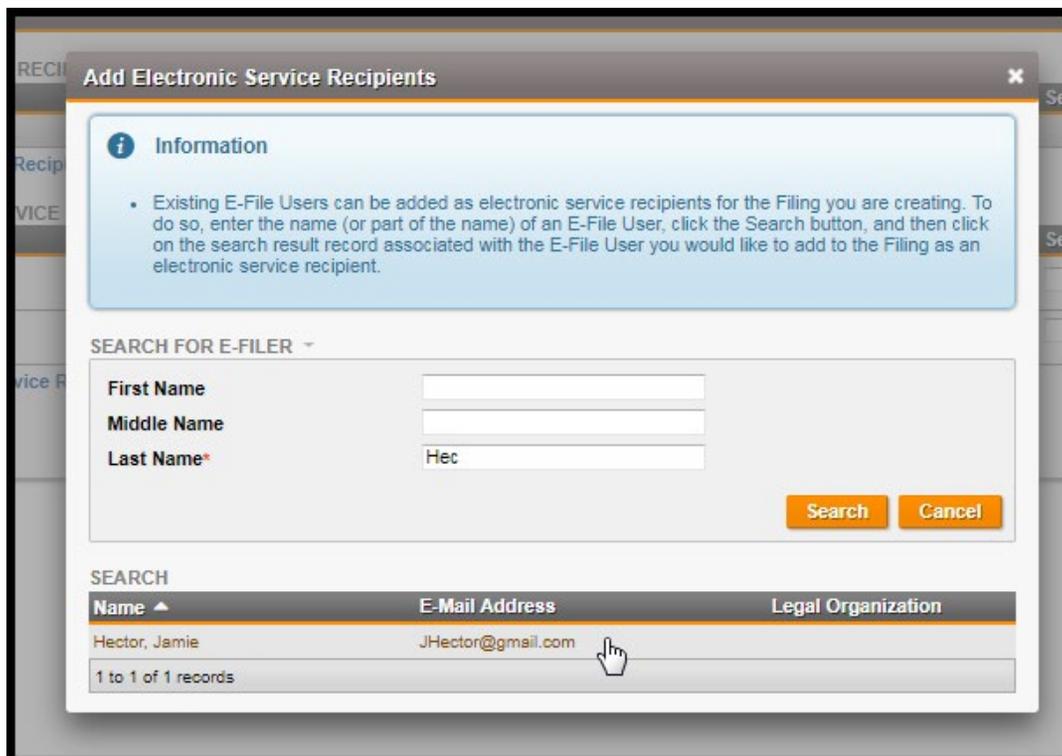
The **Add Electronic Service Recipients** window appears



**Fig. 1.96: Add Electronic Service Recipients** window

The **Add Electronic Service Recipients** window has a single Search for E-filers container that lets you search for other authorized e-Filers you want to include for service.

17. Enter search criteria.
18. Click **Search**.



**Fig. 1.97: Add Electronic Service Recipients** window – Search result appears

19. Select the e-Filer you want to include for electronic service from the Search display table.

You return to the Service Information screen and the e-Filer is added to the **Electronic Service Recipients** table

20. Select **Service Method** for **Electronic Service** and / or **Conventional Service Recipients**, as needed.
21. Enter **Service Date** for **Conventional Service Recipients**, as needed.

**C-TRACK E-FILING** Nina Lee Winslow

FILING PROGRESS **Filing Information** Upload Document Service Information Filing Summary

**Service Information**

**ELECTRONIC SERVICE RECIPIENTS**

Name	Role	Representing	E-Mail Address	Service Method
Hector, Jamie	Bar ID User Default Role		nanowiz+JHector@gmail.com	eService

[Add Electronic Service Recipients](#)

**NON-ELECTRONIC SERVICE RECIPIENTS & UNLINKED CASE PARTIES/PARTICIPANTS**

Name	Role	Representing	Address	Service Method	Service Date
Blueray Remodeling LLC	Defendant	Self-Represented	206 W Morris St Essington 19029	Not Served	03-21-2019
Crowe, Daniel	Attorney	Sugar Ray Records (Plaintiff)	208 W Orange St Media 19063	Not Served	03-21-2019

[Add Non-Electronic Service Recipients](#)

**Previous** **Next**

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**Fig. 1.98: Service Information** screen – input complete

22. Click **Next**.

The **Filing Summary** screen appears.

**C-TRACK E-FILING**
Nina Lee Winslow

FILING PROGRESS
Filing Information
Upload Document
Service Information
Filing Summary

**Filing Summary** ?

**CASE DETAILS** ▾

<b>Court</b>	Delaware County Court of Common Pleas
<b>Case Category</b>	Civil
<b>Case Type</b>	Contract
<b>Case Subtype</b>	Fraud

**FILING INFORMATION** ▾

<b>Filing Number</b>	10071	<b>Type</b>	Discovery - Request for Admissions by
<b>Filed on Behalf of</b>	Sugar Ray Records	<b>Comments</b>	
<b>Other Filed on Behalf of Amended</b>		<b>Emergency</b>	
		<b>Confidential</b>	

**PARTY INFORMATION**

Name	Type	Role	Address	Attorney(s)
Sugar Ray Records	Organization	Plaintiff	1222 W Baltimore Pike Media PA 19063	Daniel Crowe
Blueray Remodeling LLC	Organization	Defendant	206 W Morris St Essington PA 19029	

**DOCUMENTS**

Name	Request Confidential	Confidential Reason	Exclude from eService	Comments
Discovery - Request for Admissions by				

**ELECTRONIC SERVICE RECIPIENTS**

Name	Role	Representing	E-Mail Address	Service Method
Jamie Hector	Bar ID User Default Role		nanowiz+JHector@gmail.com	eService

**NON-ELECTRONIC SERVICE RECIPIENTS & UNLINKED CASE PARTIES/PARTICIPANTS**

Name	Role	Representing	Address	Service Method	Service Date
Blueray Remodeling LLC	Defendant	Self-Represented	206 W Morris St Essington PA 19029	Not Served	03-21-2019
Daniel Crowe	Attorney	Sugar Ray Records (Plaintiff)	208 W Orange St Media 19063	Not Served	03-21-2019

Edit Filing Add Associated Filing Add To Cart Delete This Filing

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**Fig. 1.99: Filing Summary screen**

Review the **Filing Summary** screen to ensure the information you are submitting.

23. Click **Add to Cart**.

The **Cart** screen appears.

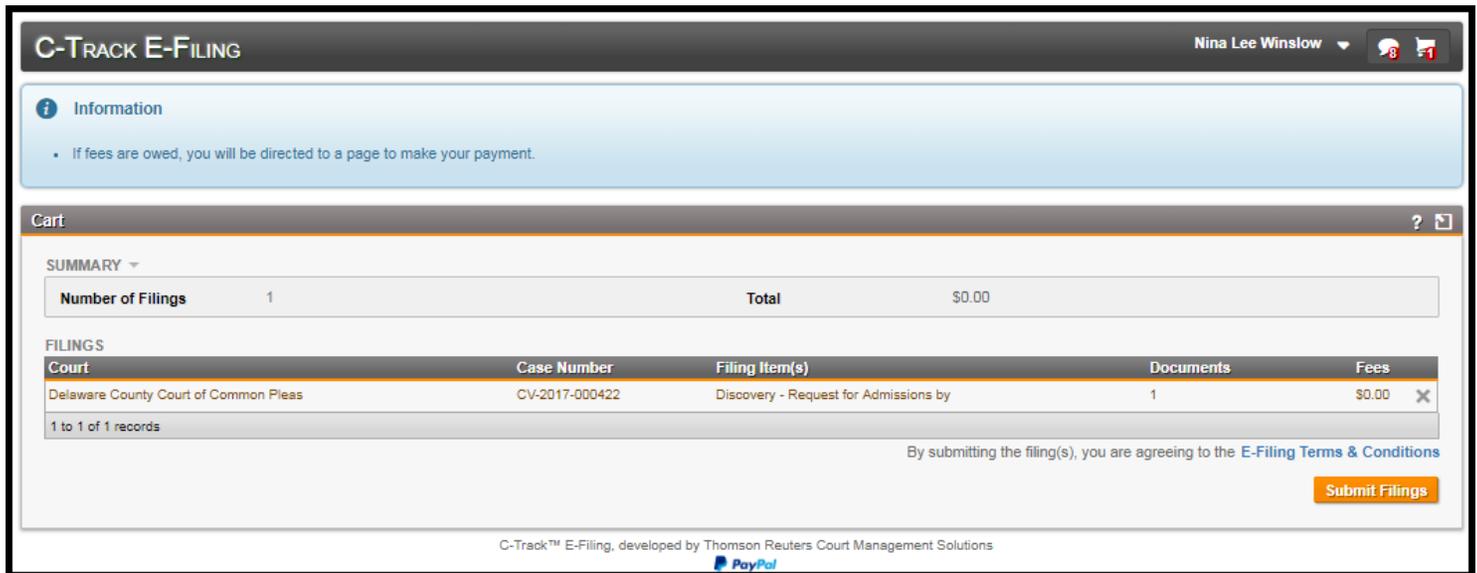


Fig. 1.100: Cart screen

24. Click **Submit Filings**.

You navigate to a payment screen where payment method information is captured. Once the information is successful saved and process, the **Submission Confirmation** screen appears.

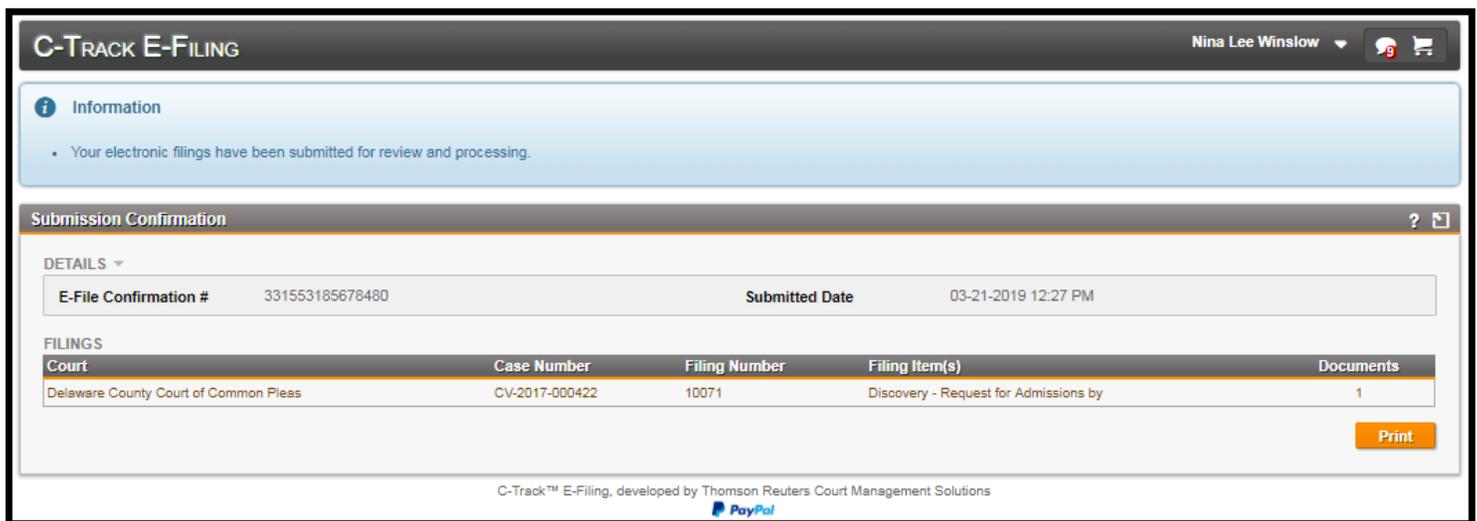


Fig. 1.101: Submission Confirmation screen

You have successfully submitted as electronic filing for an existing case in the C-Track E-Filing application.

Processing of the Submitted Filing is performed by Court personnel in the C-Track CMS application. Once processing is completed information about the success or failure of the submission is sent back to your E-Filer **Filing** queue. Information also appears in the **Notifications** icon in the top right screen banner of every **C-Track E-Filing** screen. Additionally, your Court may send an email to the email address associated to your user account.

Once the Court has processed the filing, you receive email notification regarding the successful or failure of the filing. The email you receive displays according to the specific email application with which you registered your E-File account.

Additionally, any party that was served electronically with a successfully processed filing receives an email notification.

## 1.9 Support Staff Completes a Draft Filing

When your Legal Organization Administrator associates another member of your Legal Organization to your E-File Account, and makes them an Authorized E-Filer in the Support Staff capacity, this allows them access to all filings available through your Filings menu, including filings in Draft status. Support staff do not need to have Matters shared with them to access filings when they use the **Switch Association** functionality to establish the association. By associating support staff, this creates a proxy relationship where the support staff acts on behalf of an authorized e-Filer to submit filings and complete filings in Draft status. Remember, Support Staff must also be authorized E-Filers – they register in e-File without a Bar ID.

You cannot associate support staff to your Personal Account, they must choose a Legal Organization in which your association is active.

In the example, a member of a Legal Organization who works in support of attorney's associated their E-File account to an attorney and completes a filing from Draft status and submits the filing to the Court.

1. Select the down chevron to the right of your Username in the top banner navigation.

The **User Account** options appear.



Fig. 1.102: User Account options exposed

➤ **NOTE:** In addition to clicking the link in the **User Account** menu, the **Select Authoring E-File User** window can be accessed through the keyboard shortcut:

**Switch Association**      **Ctrl + \ , U**

2. Select the **Switch Association** link.

The **Select Association** window appears.

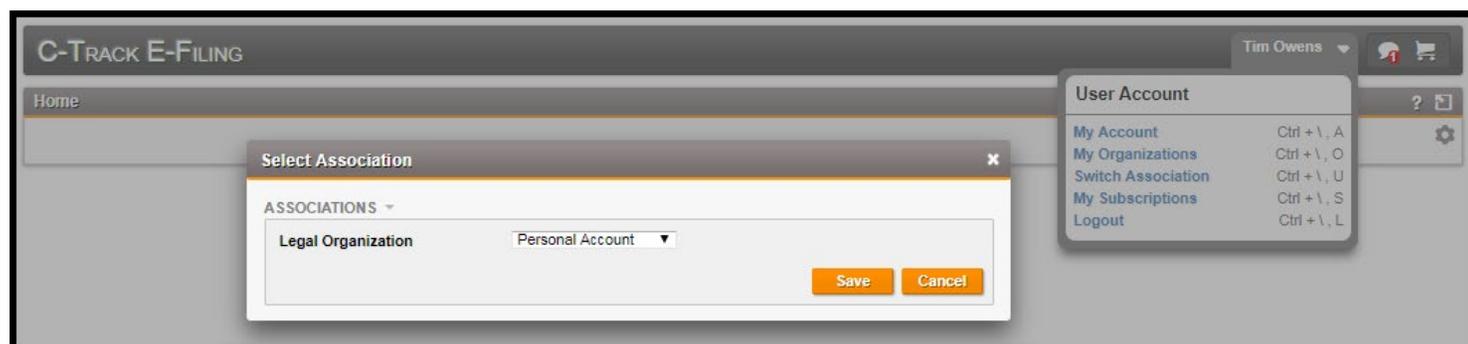
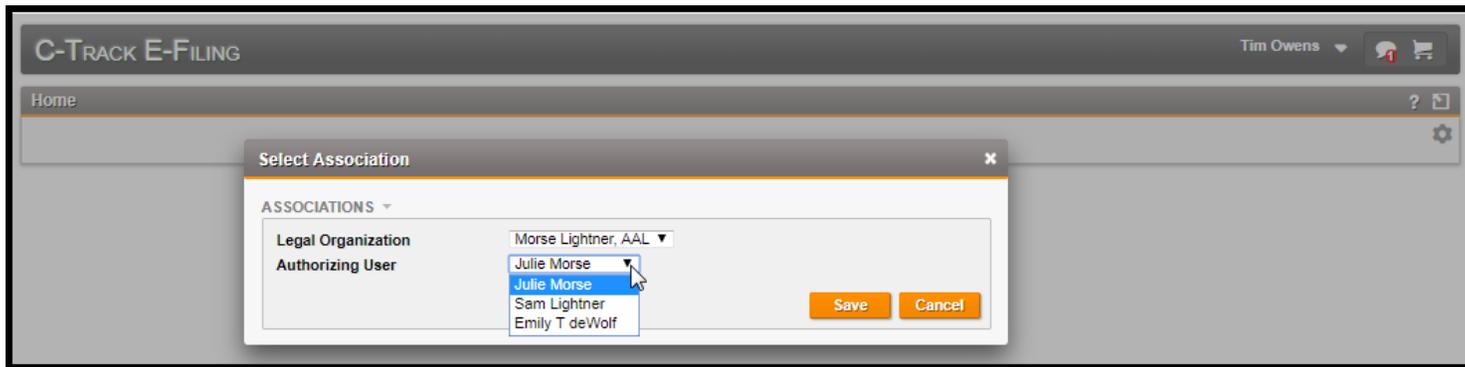


Fig. 1.103: Select Authoring E-File User window

3. From the **Legal Organization** drop down, select your organization.

With the selection of the **Legal Organization**, the **Authorizing Efile User** drop down appears.



**Fig. 1.104: Select Association window - Authorizing User drop down**

4. From the **Authorizing User** drop down, select the E-Filer for whom you are filing.  
Note this user is authorized to file on behalf of three attorney users.
5. Click **Save**.

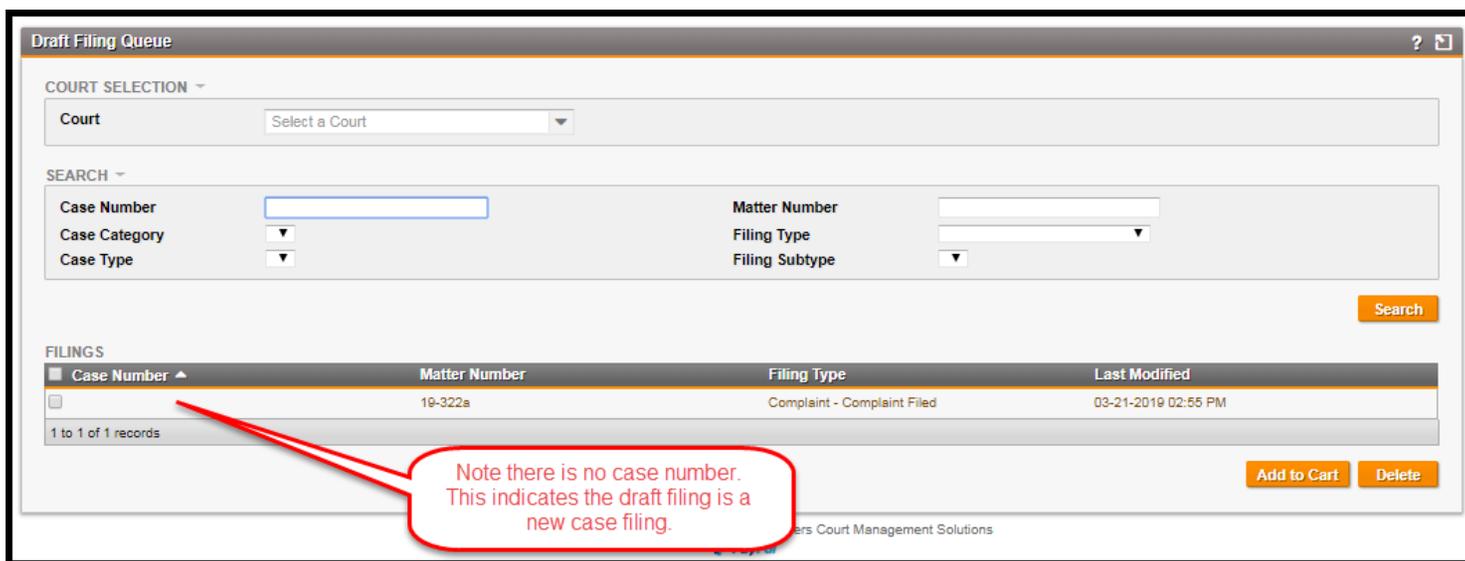
You return to the **Home** screen. Your Authorized E-File User appears below your user login and the Legal Organization appears below your Authorized E-File User in the upper right top banner.



**Fig. 1.105: Home screen with Authorizing E-Filer functionality**

6. Select **Filings > Draft** from the left navigation.

The **Draft Filing Queue** screen appears. All filings for the **Authorizing E-Filer** that have a draft status appear. If the **Authorizing E-Filer** was logged into the E-File application, the screen would display identical information.



**Fig. 1.106: Draft Filing Queue screen**

The **Draft Filing Queue** screen displays three containers. The **Court Selection** container lets you identify a single Court for which you can view Draft Filings, since E-Filing supports filings in multiple Courts.

The **Search** container lets you enter criteria of **Case Number**, **Matter Number**, **Case Category**, **Filing Type**, and **Filing Subtype** upon which you can search. The **Matter Number** can be enabled for use by Legal Organizations and e-filers from legal organizations can use an identifier internal to their organization. This lets Legal Organization filers with the proper security permission view filings by other members of the Legal Organization.

The **Filings** display table show all filings in the Draft queue by default. Since this filer has a single filing there is no need to use the Search function to find a filing.

The check box to the left of the **Case Number** can select individual filings for use with the **Add to Cart** button or the **Delete** button.

The check box in the header of the Filings display table selects all cases in the display table for use with the **Add to Cart** button or the **Delete** button.

The **Delete** button produces a **Confirm** window that requires you confirm the deletion of the filing. When you confirm the deletion, the filing is deleted from the **Draft Filing Queue** screen and is not recoverable.

The **Case Number** column of the **Filings** display table can be selected to navigate to the **Case View** screen to provide an overview of case information.

The **Matter Number**, **Filing Type** and **Last Modified** columns can be selected to navigate to the **Filing Summary** screen.

Within the **Filings** display table, the **Case Number** column can be selected to navigate to the **Case View** screen and the **Matter Number**, **Filing Type** and **Last Modified** columns can be selected to navigate to the **Filing Summary** screen.

7. Select the **Matter Number** for the line item in the **Filings** display table.

The **Matter View** screen for the selected filing appears.

**C-TRACK E-FILING** Tim Owens  
Julie Morse  
Morse Lightner, AAL

**Matter View - 19-322a**

**CASE INFORMATION**

<b>Court Level</b>	District	<b>Case Type</b>	Civil - Tort - Premises Liability
<b>Court</b>	Delaware County Court of Common Pleas		

**MATTER DETAILS**

<b>Legal Organization</b>	Morse Lightner, AAL	<b>Matter Number</b>	19-322a <a href="#">Edit</a>
---------------------------	---------------------	----------------------	------------------------------

**MATTER FILINGS**

Filing Type	Status	Submitted #	Submitted By	Approved Date
No records were found.				

**MATTER SHARING**

Name	E-mail	Address	Active
Morse, Julie	JMorse@gmail.com	430 N Olive St Media PA 19063	Y

[Add Colleague](#) [Create E-Filing](#)

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**Fig. 1.107: Matter View screen**

The **Matter View** screen has four containers. The **Case Information** container displays summary information about the filing and is not editable.

The **Matter Details** container shows the **Legal Organization** and **Matter Number** and the **Edit** link to the right of the number provides access to the **Edit Matter** window where you can change the Matter number.

The **Matter Filings** display table shows details for any filings related to the Matter number. All column headers in the table are sortable

The **Matter Sharing** display table shows members of the Legal Organization with whom the Matter is shared. All column headers in the table are sortable. The **Add Colleague** link below the bottom left of the table provides access to the **Add Colleague** window where you can search by name for legal organization members with whom you can share the matter.

8. Click the **Back** button of your browser to return to the **Draft Filing Queue** screen.

**C-TRACK E-FILING**

Tim Owens  
Julie Morse  
Morse Lightner, AAL

**Draft Filing Queue**

COURT SELECTION ▾  
Court: Select a Court

SEARCH ▾  
Case Number:   
Case Category: ▾  
Case Type: ▾  
Matter Number:   
Filing Type: ▾  
Filing Subtype: ▾  
Search

**FILINGS**

Case Number	Matter Number	Filing Type	Last Modified
<input type="checkbox"/>	19-322a	Complaint - Complaint Filed	03-21-2019 02:55 PM

1 to 1 of 1 records

Add to Cart Delete

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**Fig. 1.108: Draft Filing Queue screen**

9. Click the **Filing Type** area of the Filings display table line item.

The **Filing Summary** screen appears.

**C-TRACK E-FILING** Tim Owens  
Julie Morse  
Morse Lighzner, AAL

FILING PROGRESS **Party Information** Filing Information Upload Document Service Information Filing Summary

**Filing Summary**

**CASE DETAILS**

Court: Delaware County Court of Common Pleas  
 Case Category: Civil  
 Case Type: Tort  
 Case Subtype: Premises Liability

**FILING INFORMATION**

Filing Number: 10081  
 Filed on Behalf of: Coultlen Warehousing  
 Other Filed on Behalf of Amended  
 Type: Complaint - Complaint Filed  
 Comments  
 Emergency  
 Confidential

**PARTY INFORMATION**

Name	Type	Role	Address	Attorney(s)
Coultlen Warehousing	Organization	Plaintiff		Julie Morse
Lewis Roofing LLC	Organization	Defendant	413 MacDade Blvd Essington PA 19083	
Thomas T Margiotta	Person	Defendant	1171 W 14th St Chester PA 19013	

**DOCUMENTS**

Name	Request Confidential	Confidential Reason	Exclude from eService	Comments
No records were found.				

**ELECTRONIC SERVICE RECIPIENTS**

Name	Role	Representing	E-Mail Address	Service Method
No records were found.				

**NON-ELECTRONIC SERVICE RECIPIENTS & UNLINKED CASE PARTIES/PARTICIPANTS**

Name	Role	Representing	Address	Service Method	Service Date
Lewis Roofing LLC	Defendant	Self-Represented	413 MacDade Blvd Essington PA 19083		
Thomas T Margiotta	Defendant	Self-Represented	1171 W 14th St Chester PA 19013		
Julie Morse	Attorney	Coultlen Warehousing (Plaintiff)	430 N Olive St Media PA 19083		

**FILING FEES**

Fee Name	Amount
Complaint Filed	\$208.24
<b>Total</b>	<b>\$208.24</b>

**FILING FEES**

Due From: Coultlen Warehousing  
 Fees Not Required

**Edit Filing** **Add Associated Filing** **Add To Cart** **Delete This Filing**

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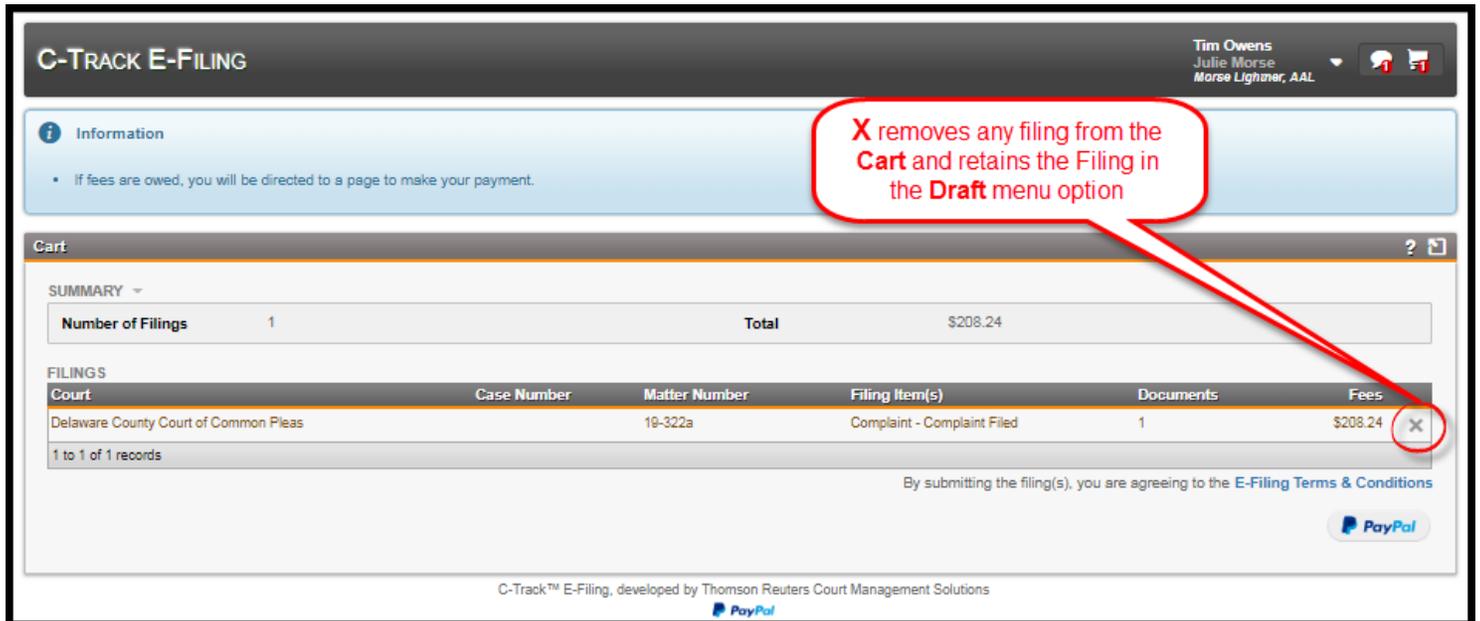
**Fig. 1.109: Filing Summary** screen

Review the **Filing Summary** screen to ensure the information you are submitting. Return to any screen to update information before you submit the filing

10. Click **Add to Cart**.

The **Cart** screen appears.

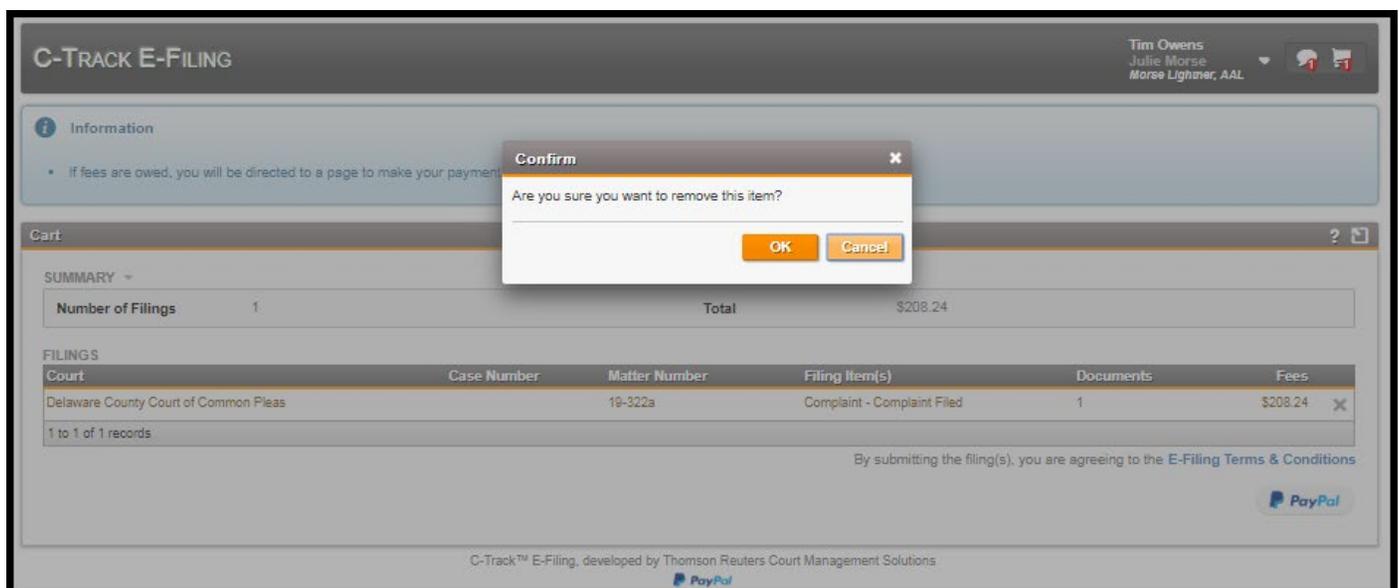
- **Note** if you have additional filings already in the **Cart** when you associated to the **Authorizing E-File User** those filings also appear. The **X** at the far right of any line item in the **Filings** display table lets you remove filings from the **Cart** and return the filing(s) to the **Draft** queue in the left menu.



**Fig. 1.110: Cart screen – filings ready for Submission**

11. Click **X** for the filing you want to remove.

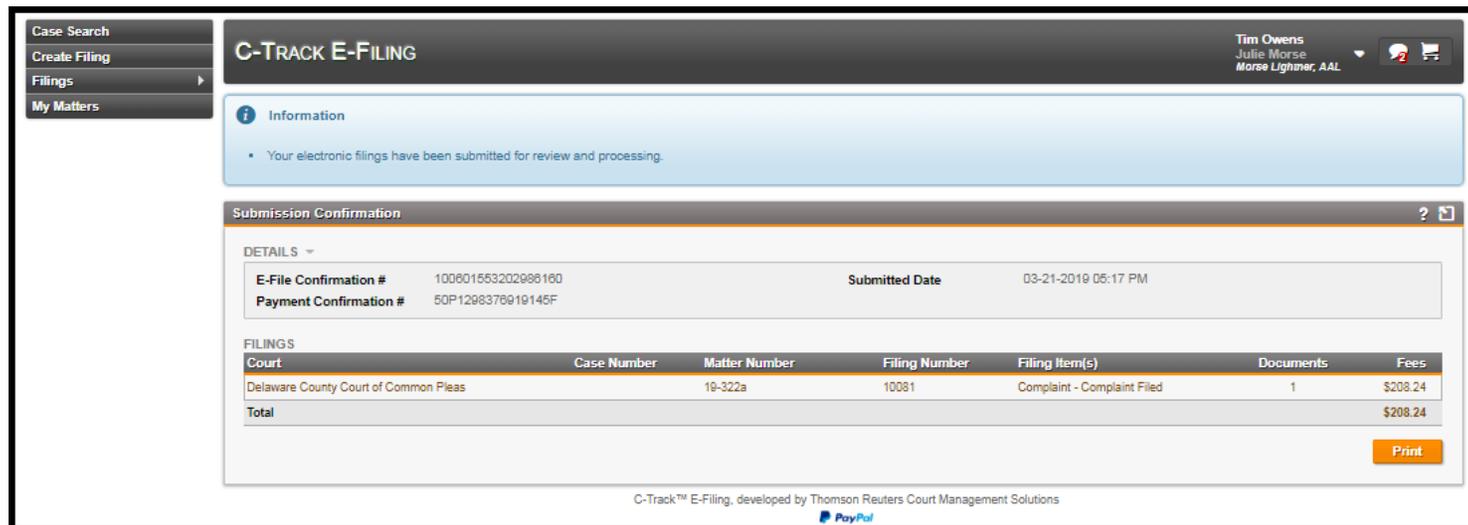
A **Confirm** window appears.



**Fig. 1.111: Confirm window – Remove a filing from the Cart**

12. Click **Cancel**.
13. Click the payment button or the **Submit Filings**.

The **Submission Confirmation** screen appears. Note the **Cart** icon shows no filings.



**Fig. 1.112: Submission Confirmation screen – Successful submission**

You have successfully submitted a filing on behalf of another authorized E-Filer in your legal organization. The **Green Success Notification** displays in the top content container, above the **Submission Confirmation** screen.

As a support staff user, the **Notification** icon and **Notifications** screen is updated with confirmation of a successfully submitted e-filing. Once the court processes the e-filing the Authorizing E-Filer, for whom you submitted the filing, receives an email.

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Find out how to contact your local office  
[thomsonreuters.com/about/locations](http://thomsonreuters.com/about/locations)

