DELAWARE COUNTY, PA
E-FILE USER GUIDE

E-FILING USER GUIDE

CONTENTS

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**.

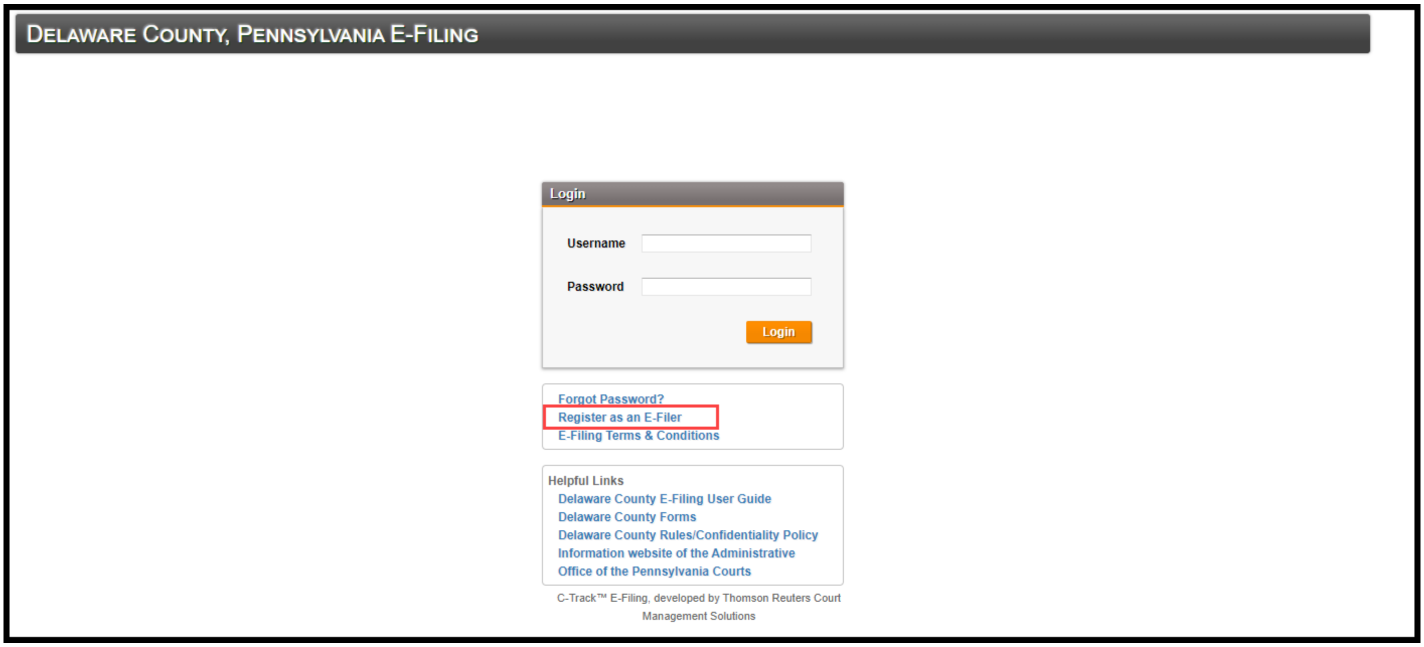


Fig. 1.1: E-File Registration / Log In screen

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

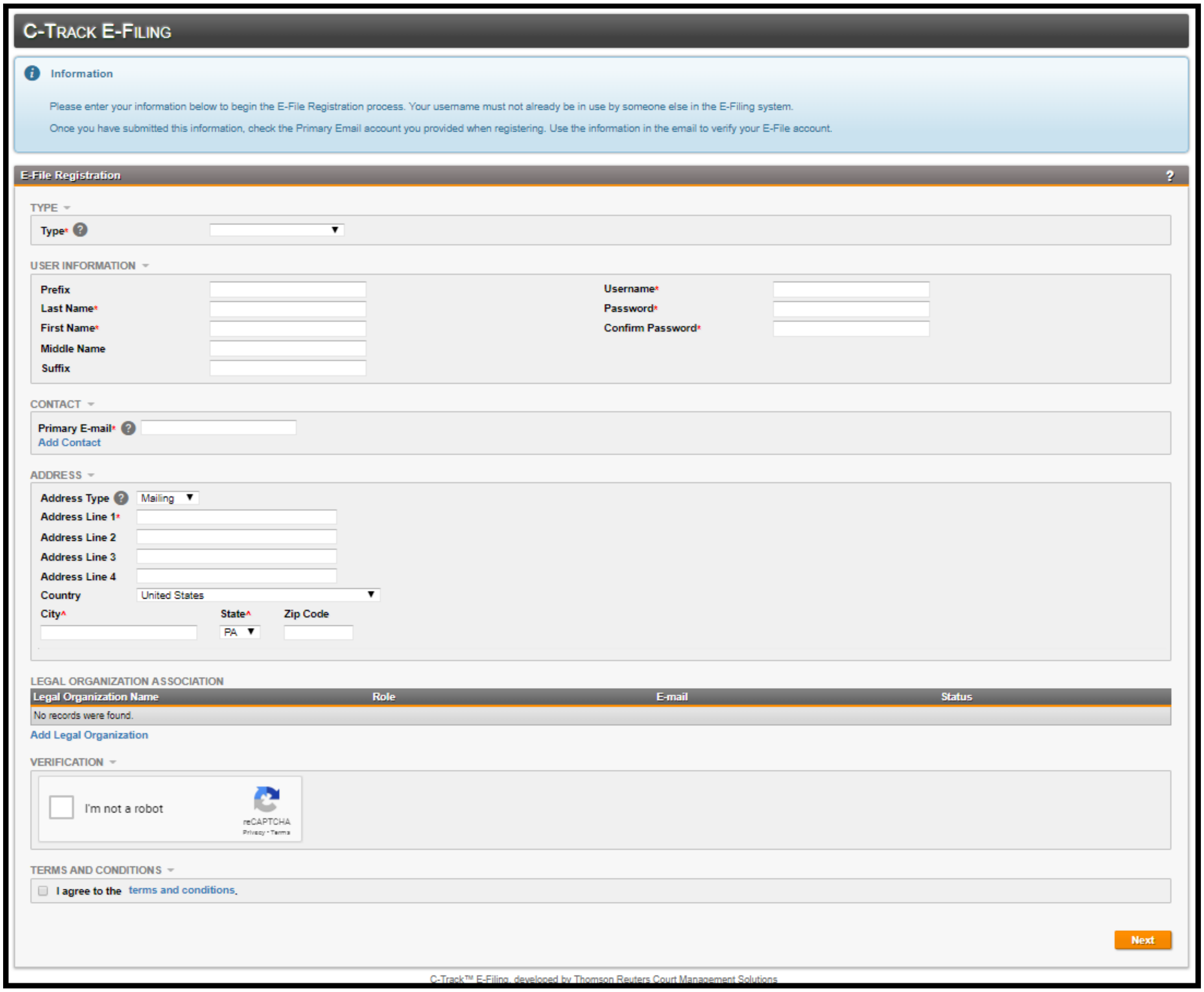


Fig. 1.2: E-File Registration screen

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.

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.

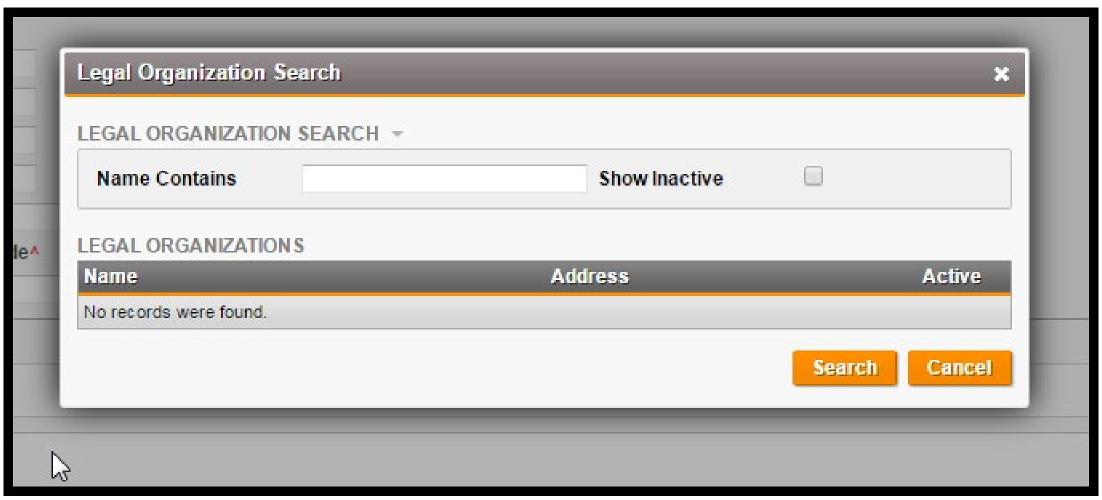


Fig. 1.4: Legal Organization Search window

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

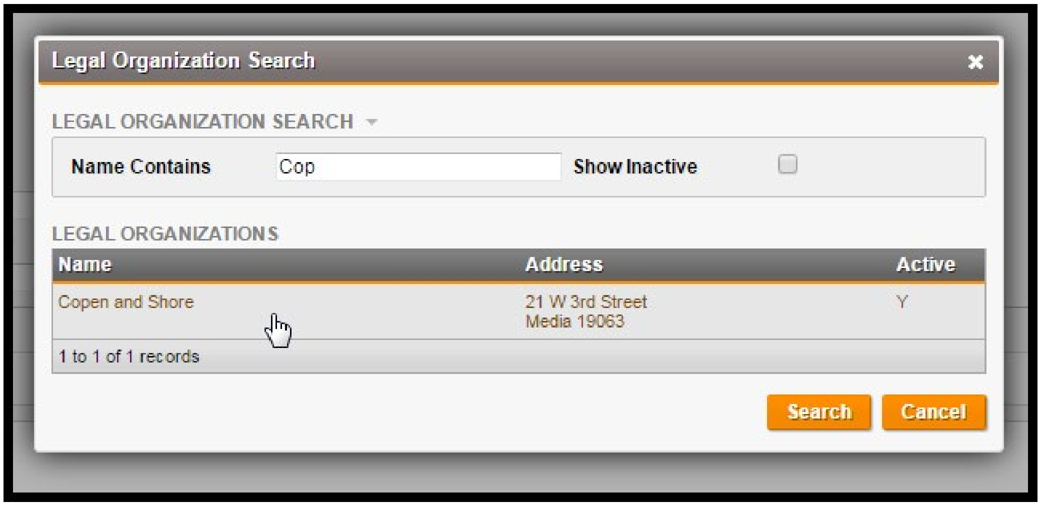


Fig. 1.5: Legal Organization Search window – search results returned

> ➢ **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.

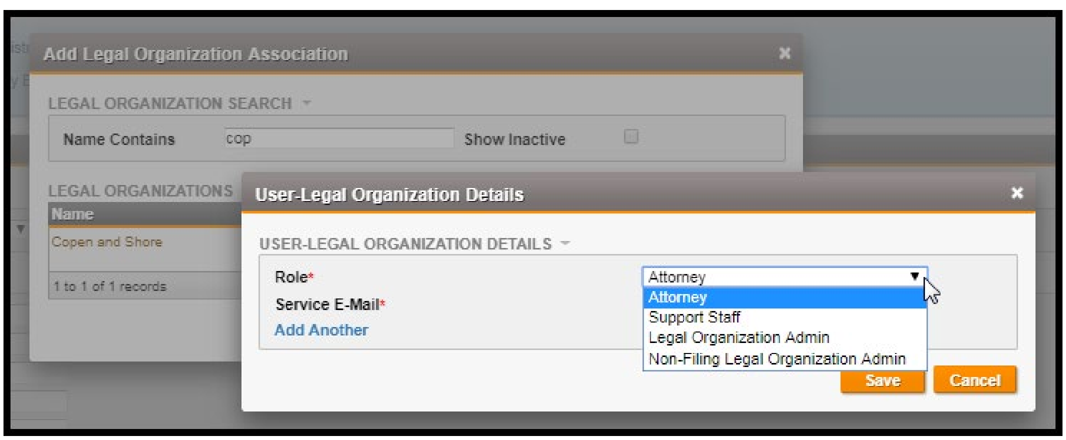


Fig. 1.6: Legal Organization Search window – Organization Details

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.

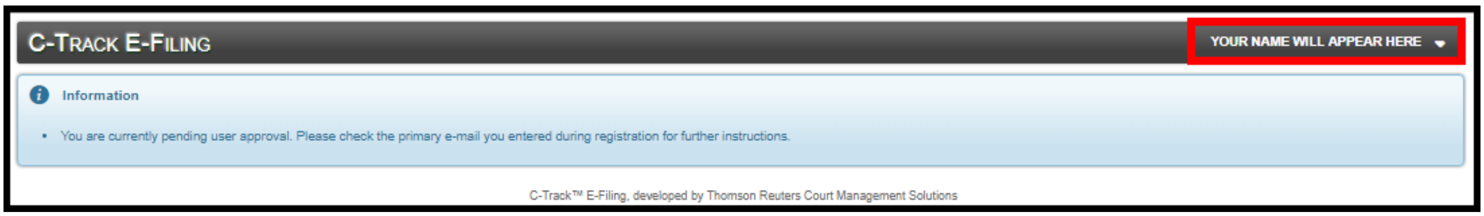


Fig. 1.7: Information message

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.

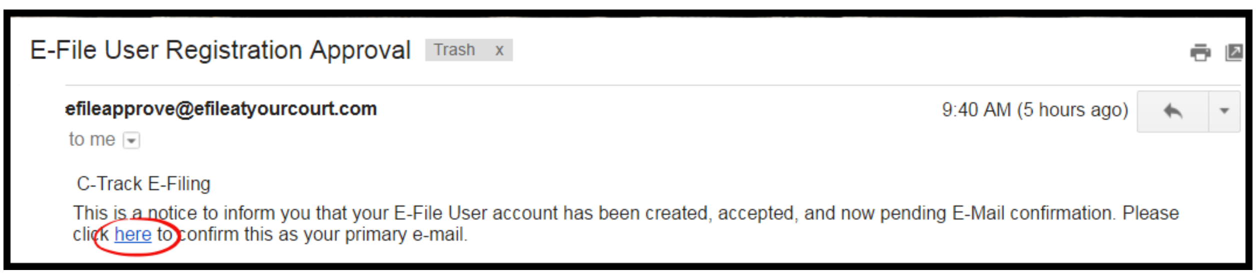


Fig. 1.8: C-Track E-Filing Email example

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

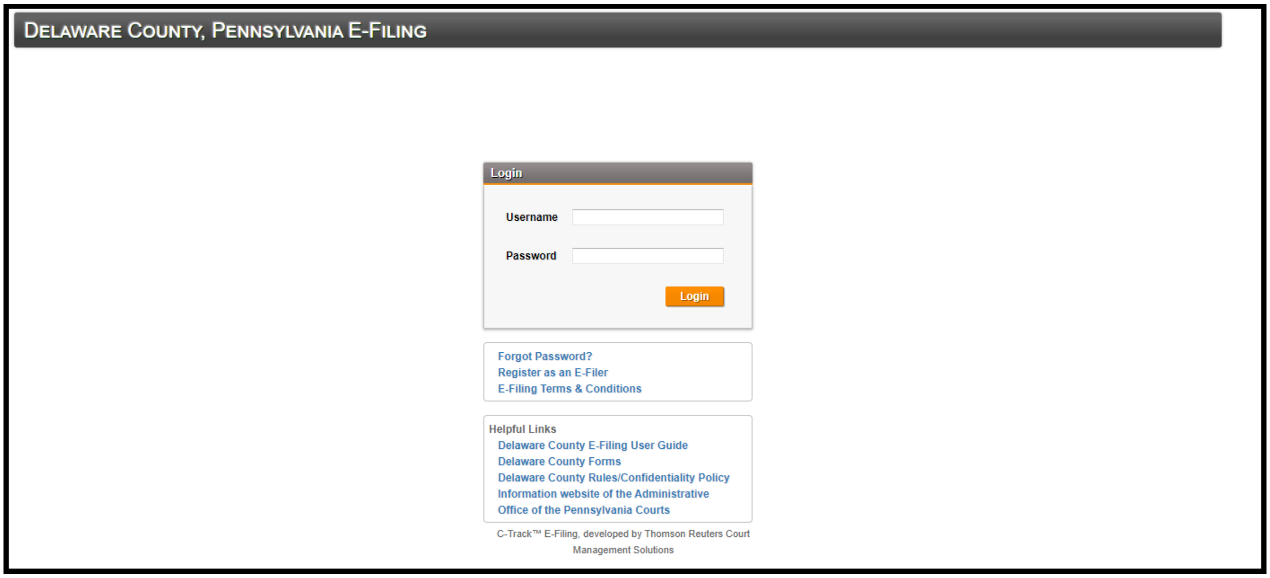


Fig. 1.9: C-Track E-Filing Login screen

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.

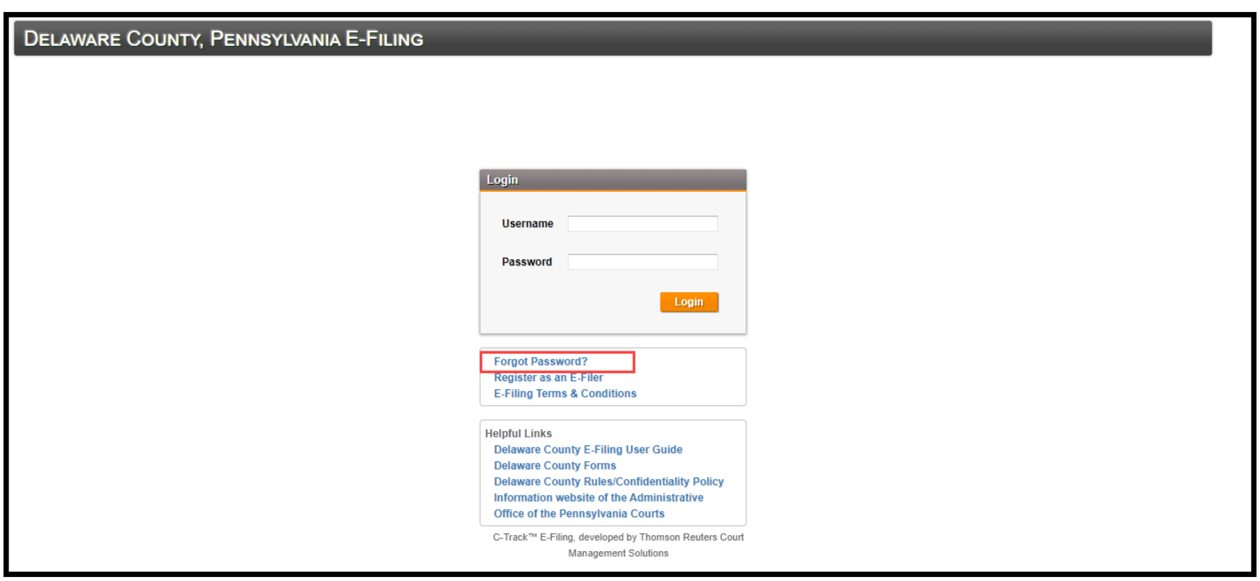


Fig. 1.11: C-Track E-Filing Login screen – **Forgot Password?**

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

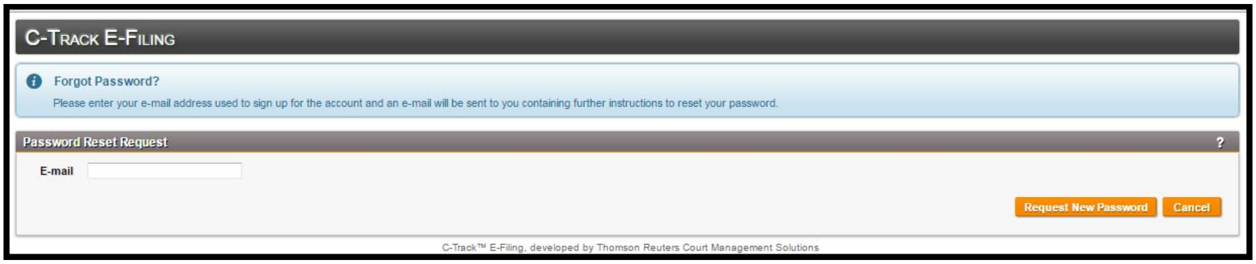


Fig. 1.12: Password Reset Request container

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.

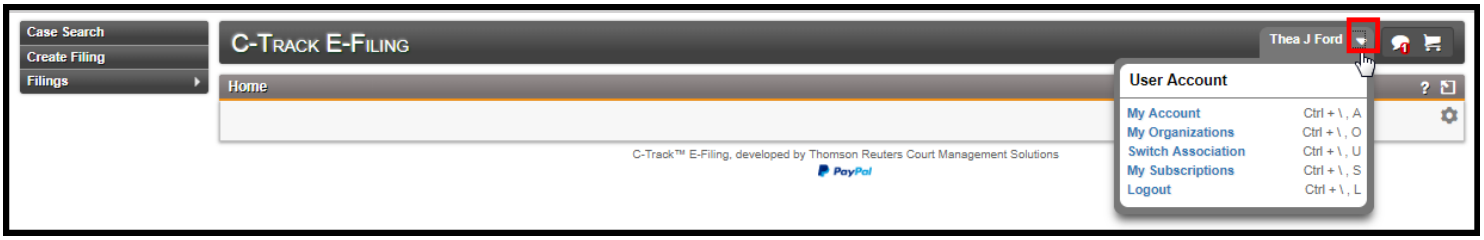


Fig. 1.13: User Account menu exposed

> **NOTE**: In addition to clicking the links in the **User Account** menu, each screen can be accessed through the keyboard shortcut for each option.
>
> | | |
> |---|---|
> | **My Account** | **Ctrl + \, A** |
> | **My Organization** | **Ctrl + \, O** |
> | **Switch Association** | **Ctrl + \, C** |
> | **My Subscriptions** | **Ctrl + \, C** |
> | **Logout** | **Ctrl + \, L** |
>
> 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.

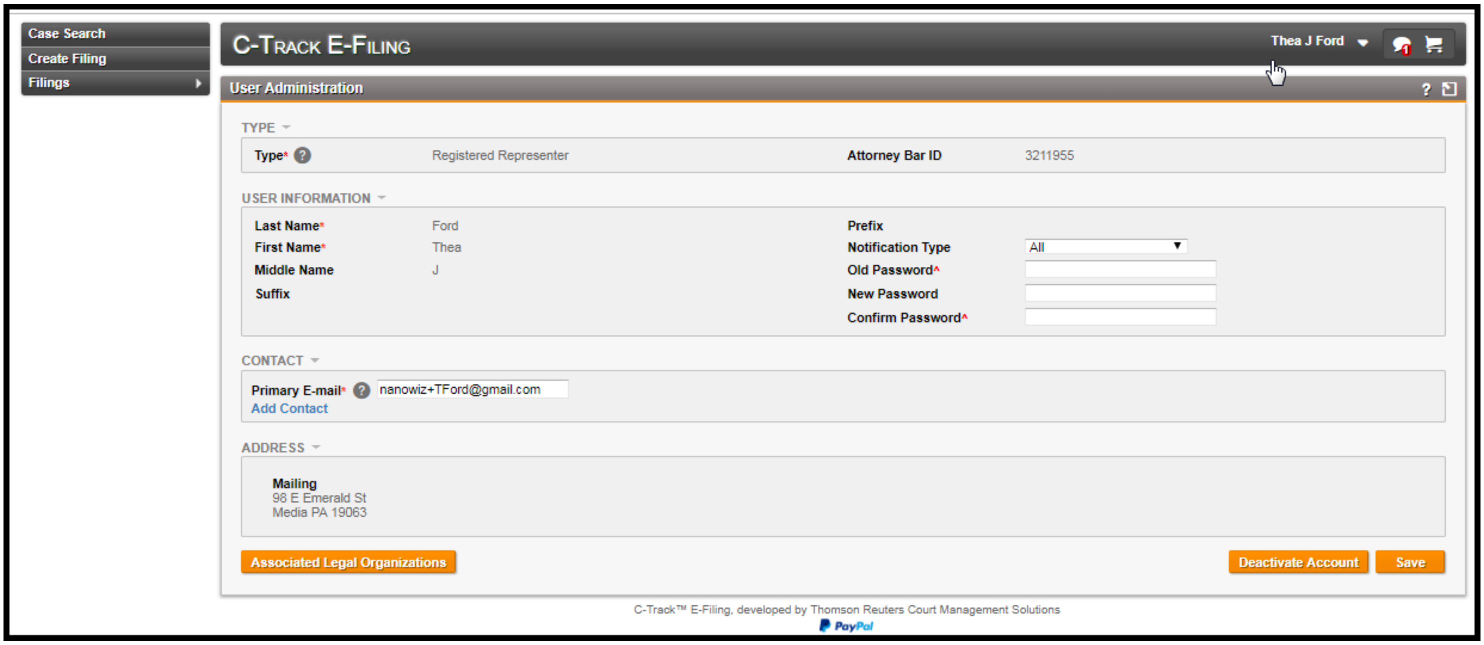


Fig. 1.14: User Administration screen

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 efiling, 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.

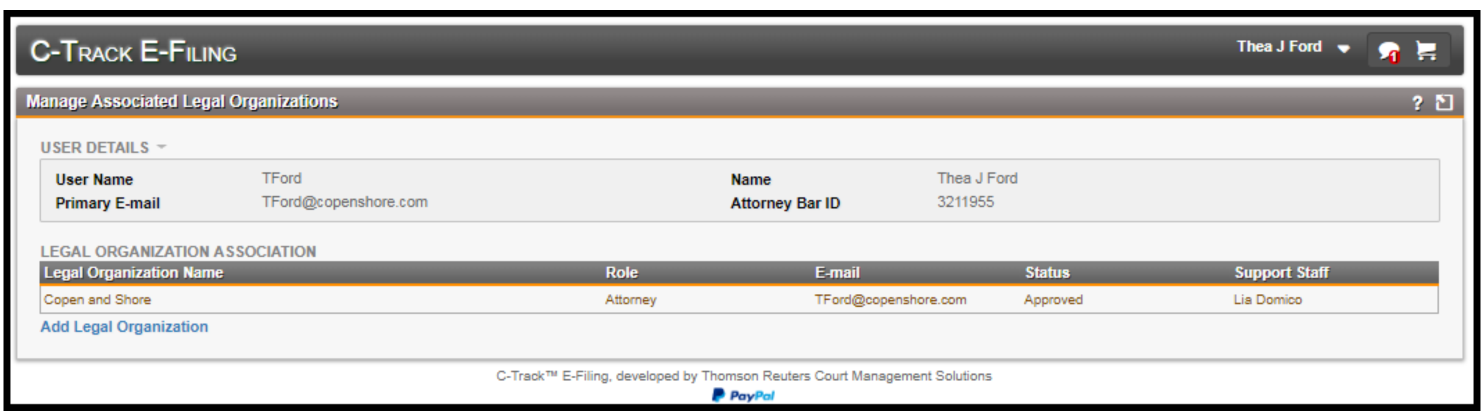


Fig. 1.15: Manage Associated Legal Organizations screen

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.

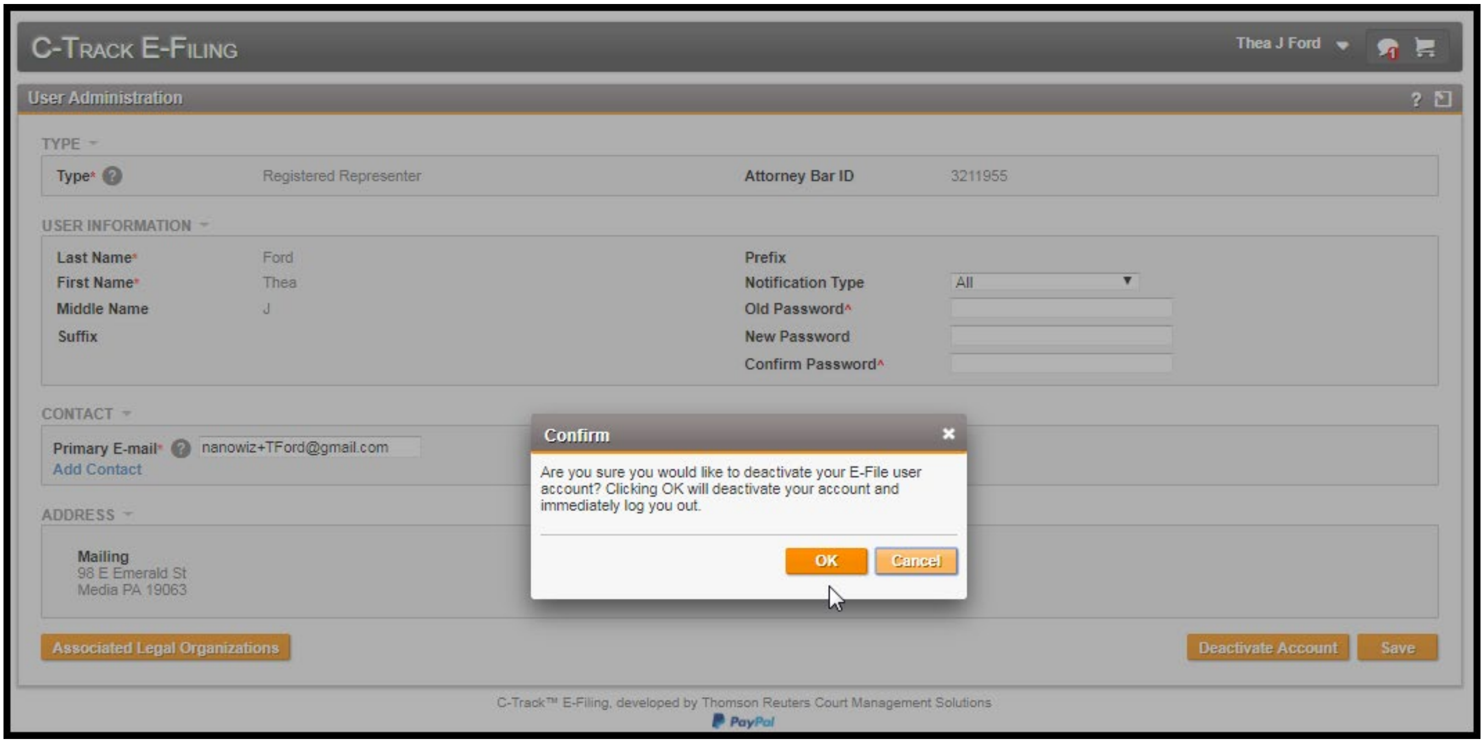


Fig. 1.16: Confirm window

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.

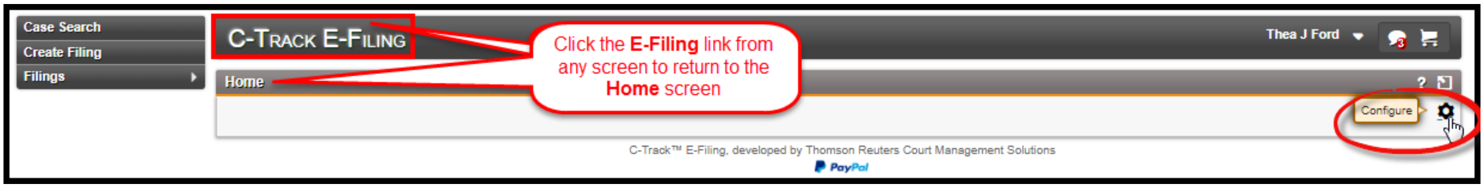


Fig. 1.17: Home screen – **Configure** icon

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.

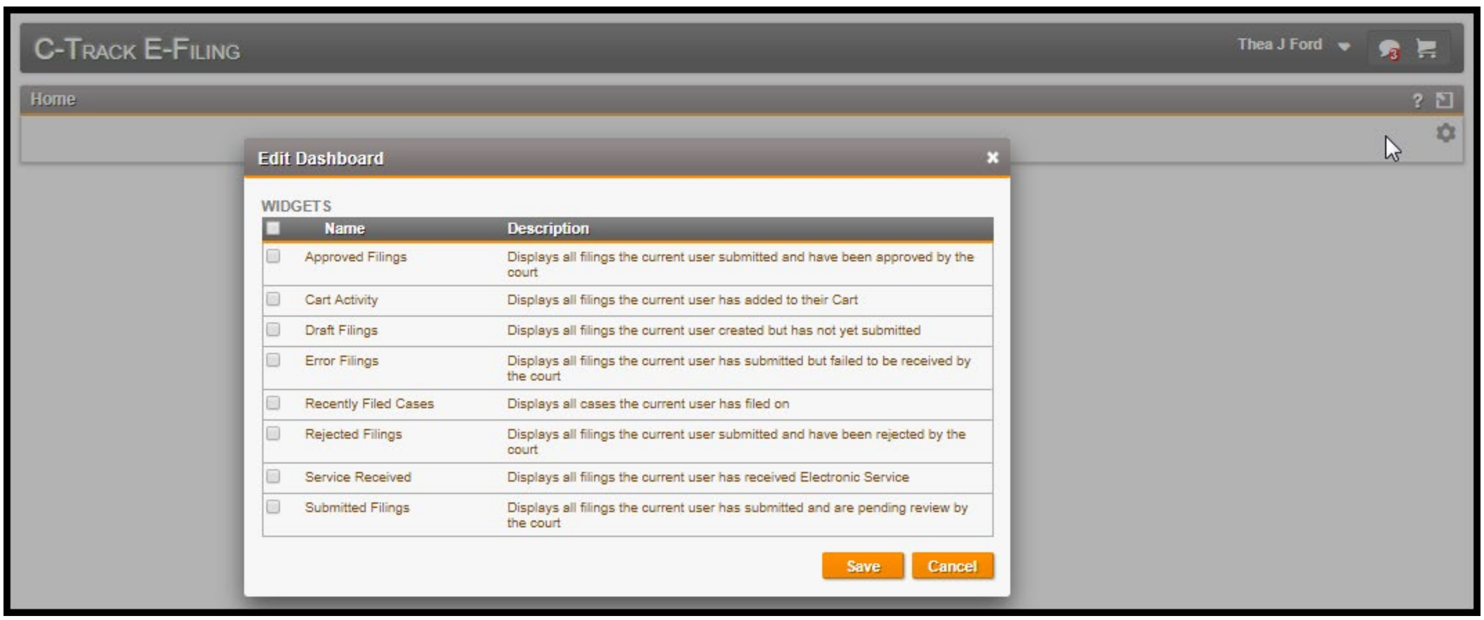


Fig. 1.18: Edit Dashboard window

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.

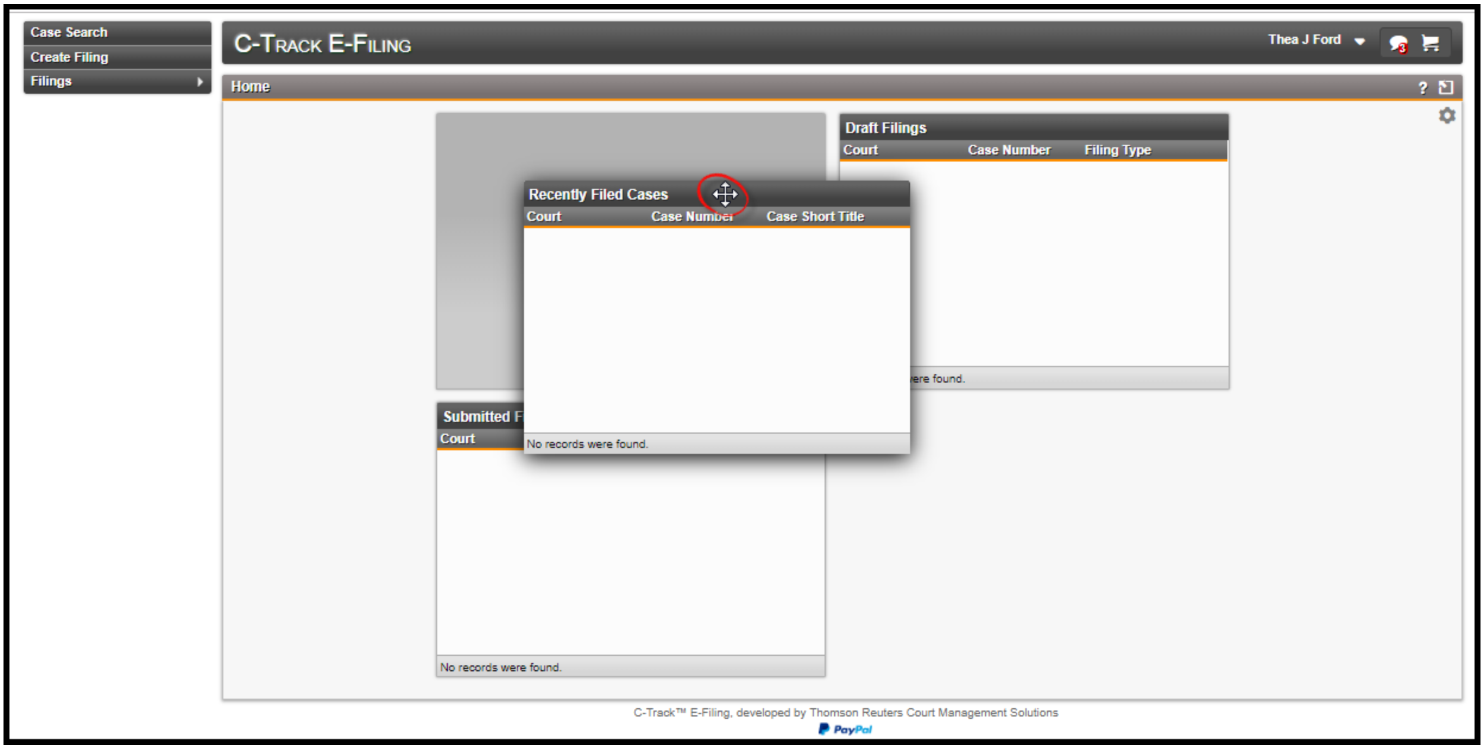


Fig. 1.19: Home screen – select Widgets added – drag and drop Widget placement

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.

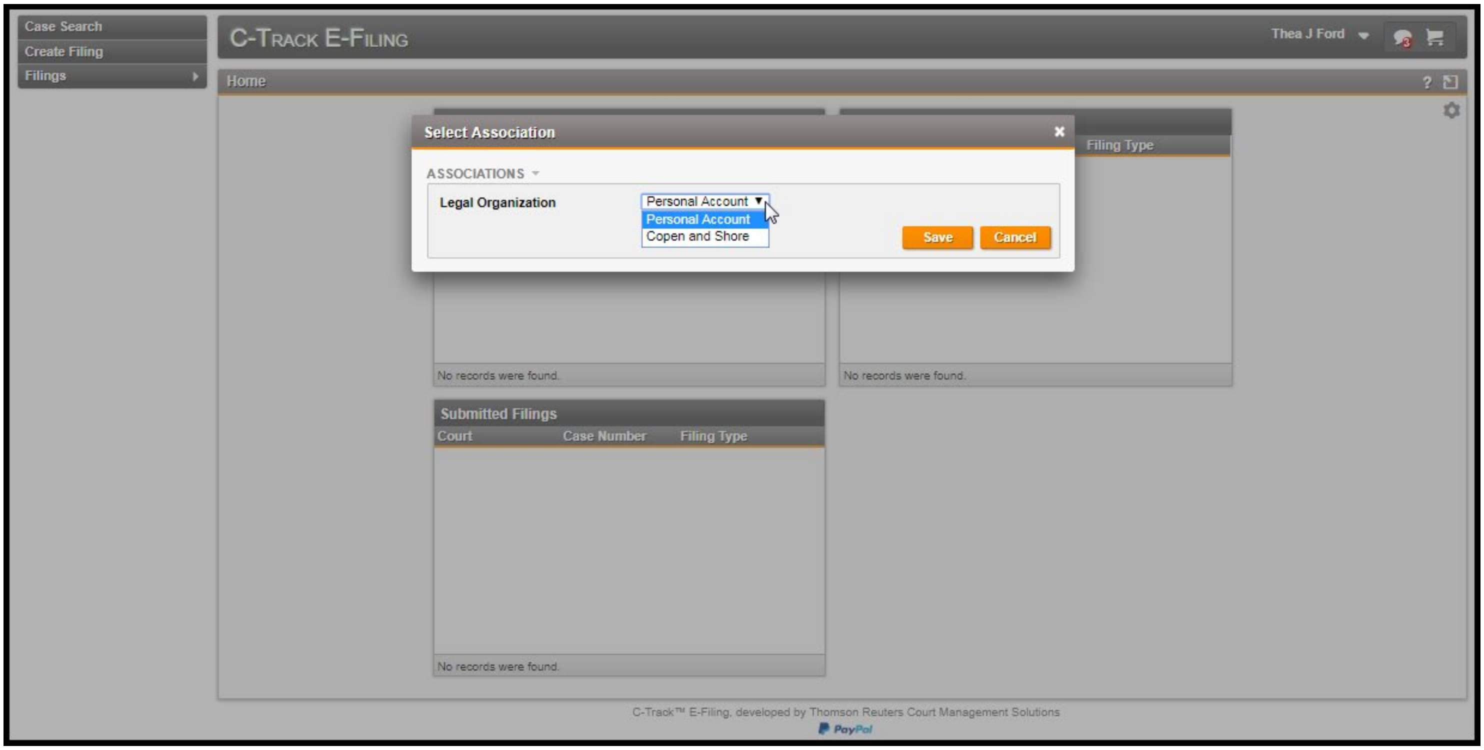


Fig. 1.20: Select Association window

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

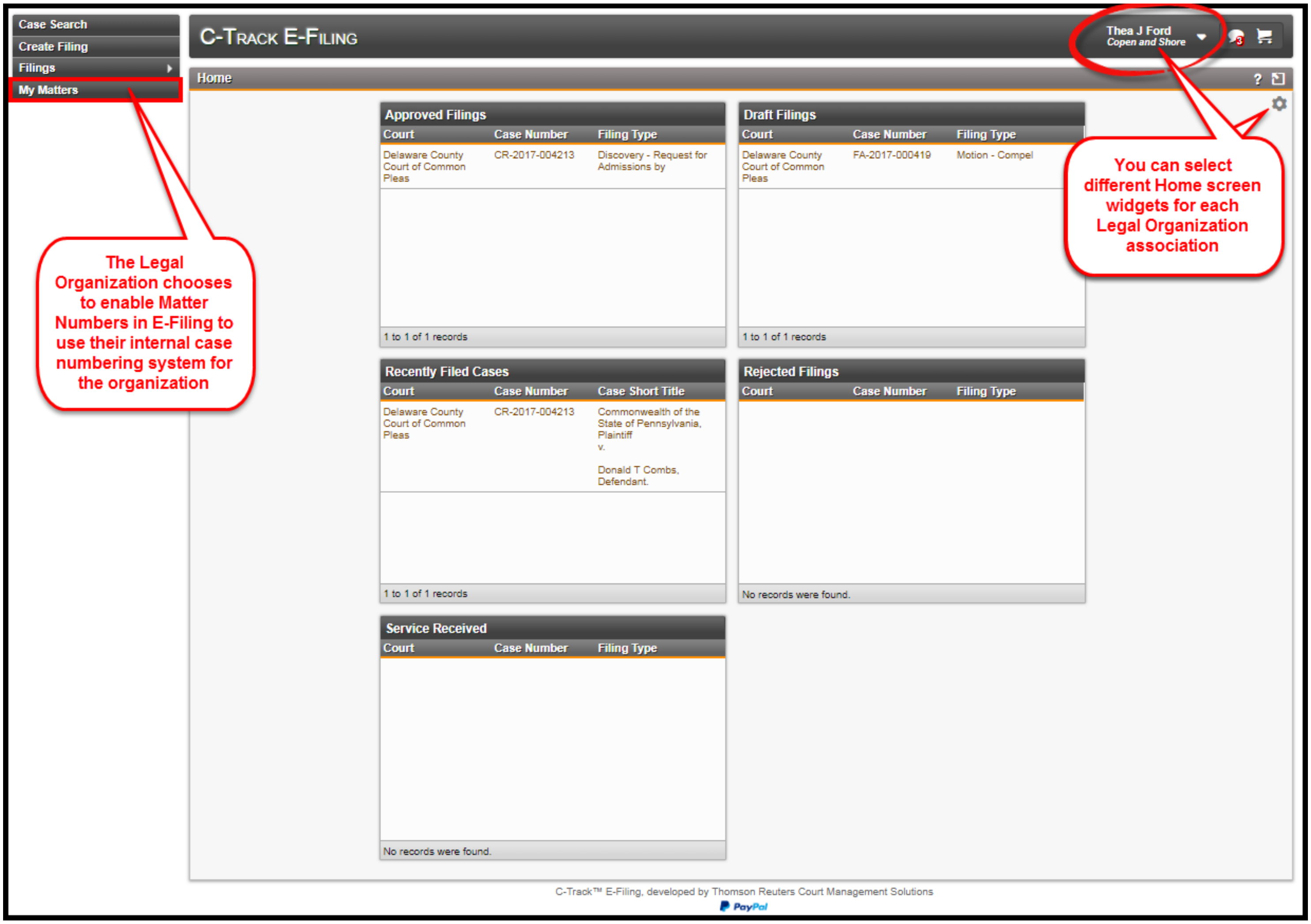


Fig. 1.21: E-File User Legal Organization Home screen

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.

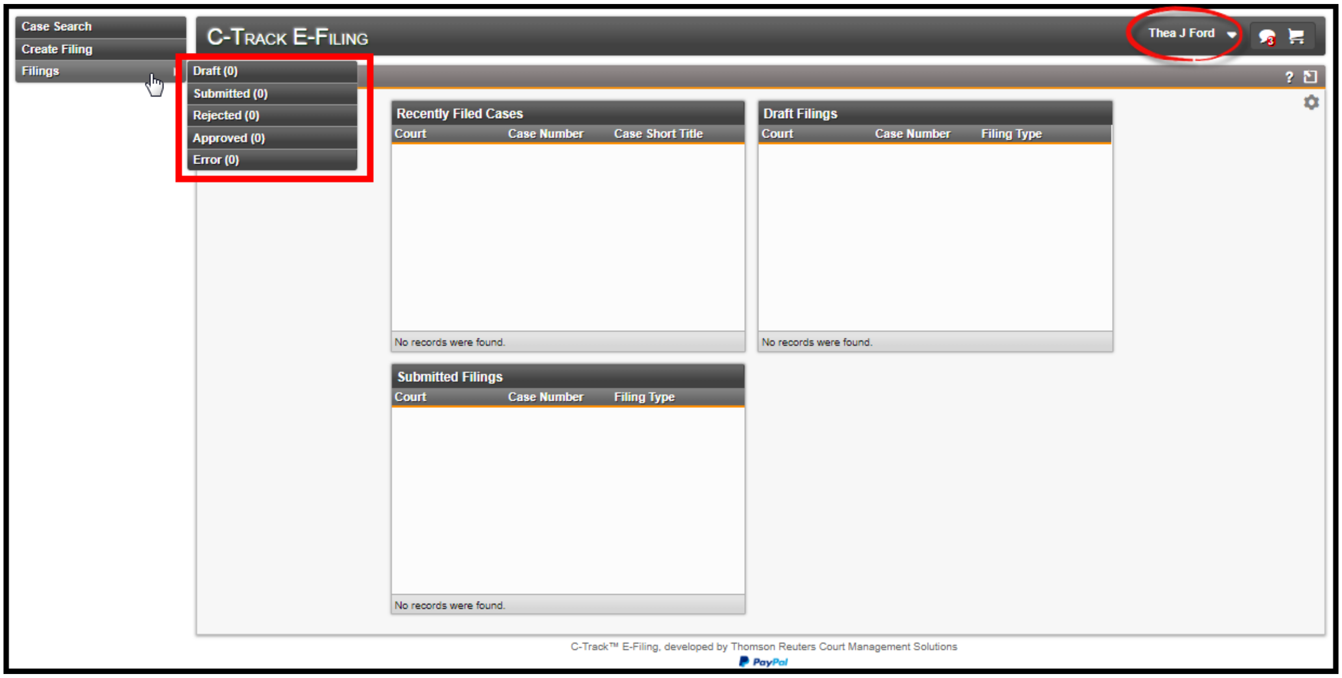


Fig. 1.22: E-File User Home screen – Personal Account

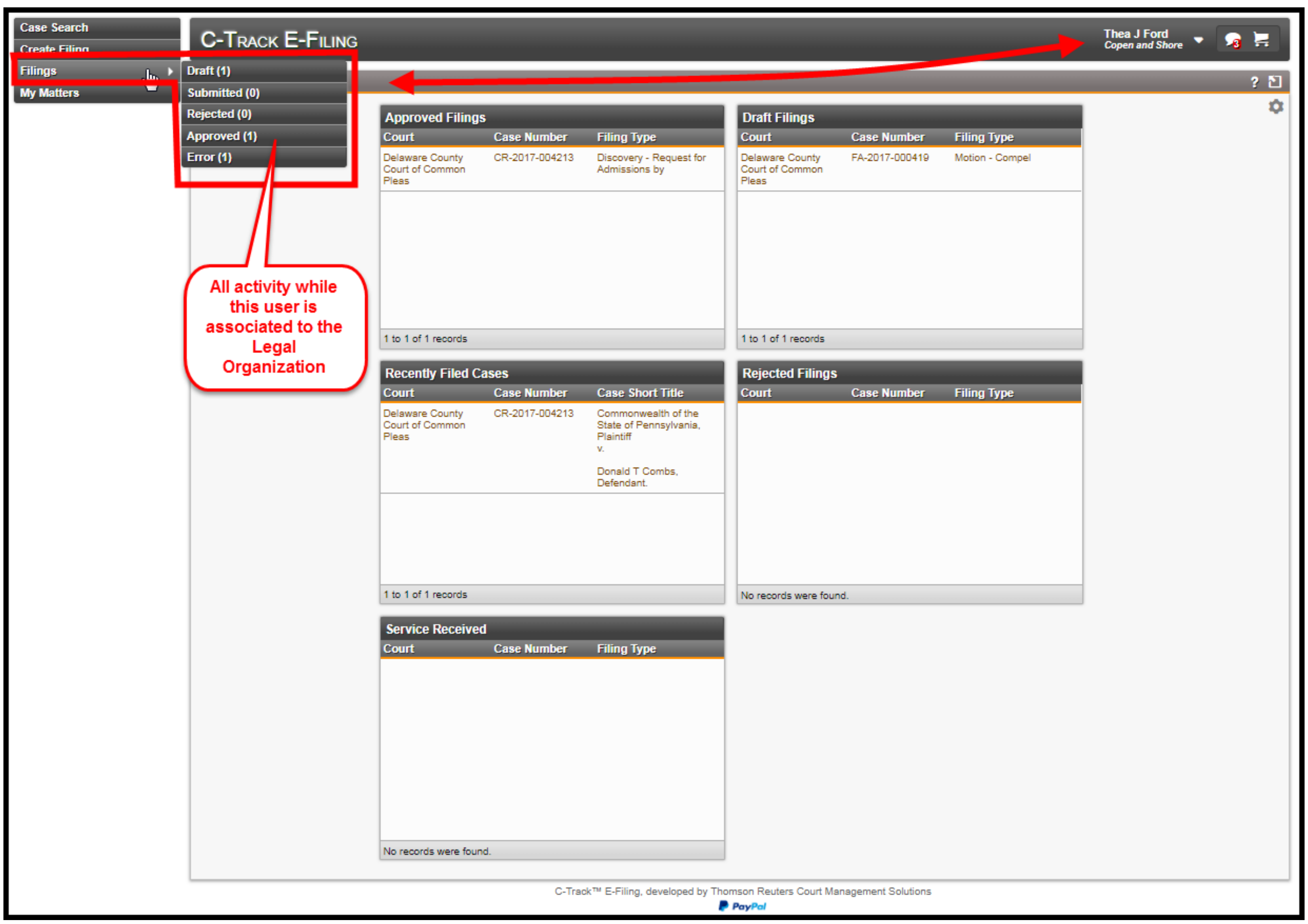


Fig. 1.23: E-File User Home screen - **Legal Organization** association

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.

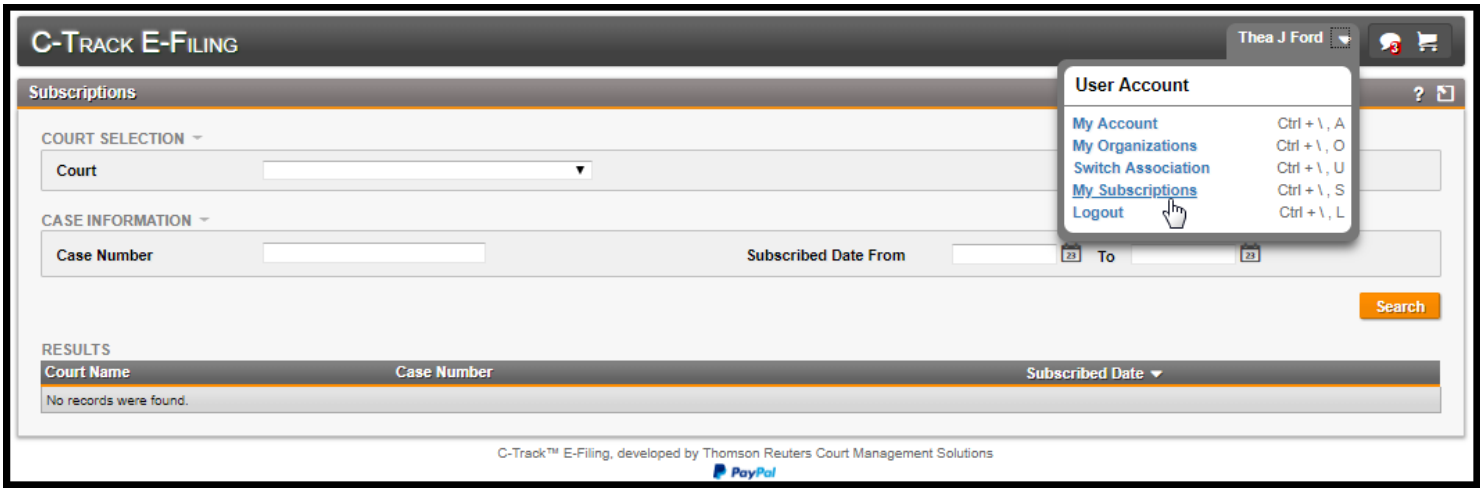


Fig. 1.24: My Subscriptions as E-File User not associated to Legal Organization

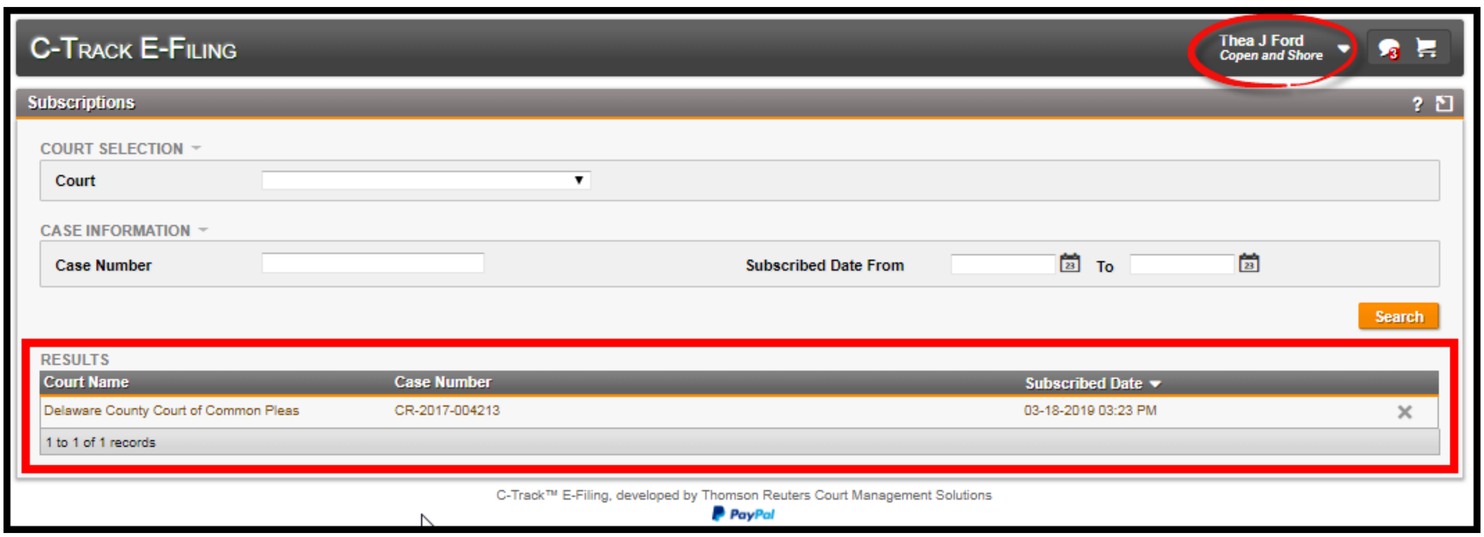


Fig. 1.25: My Subscriptions as E-File User associated to Legal Organization

➢ **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.

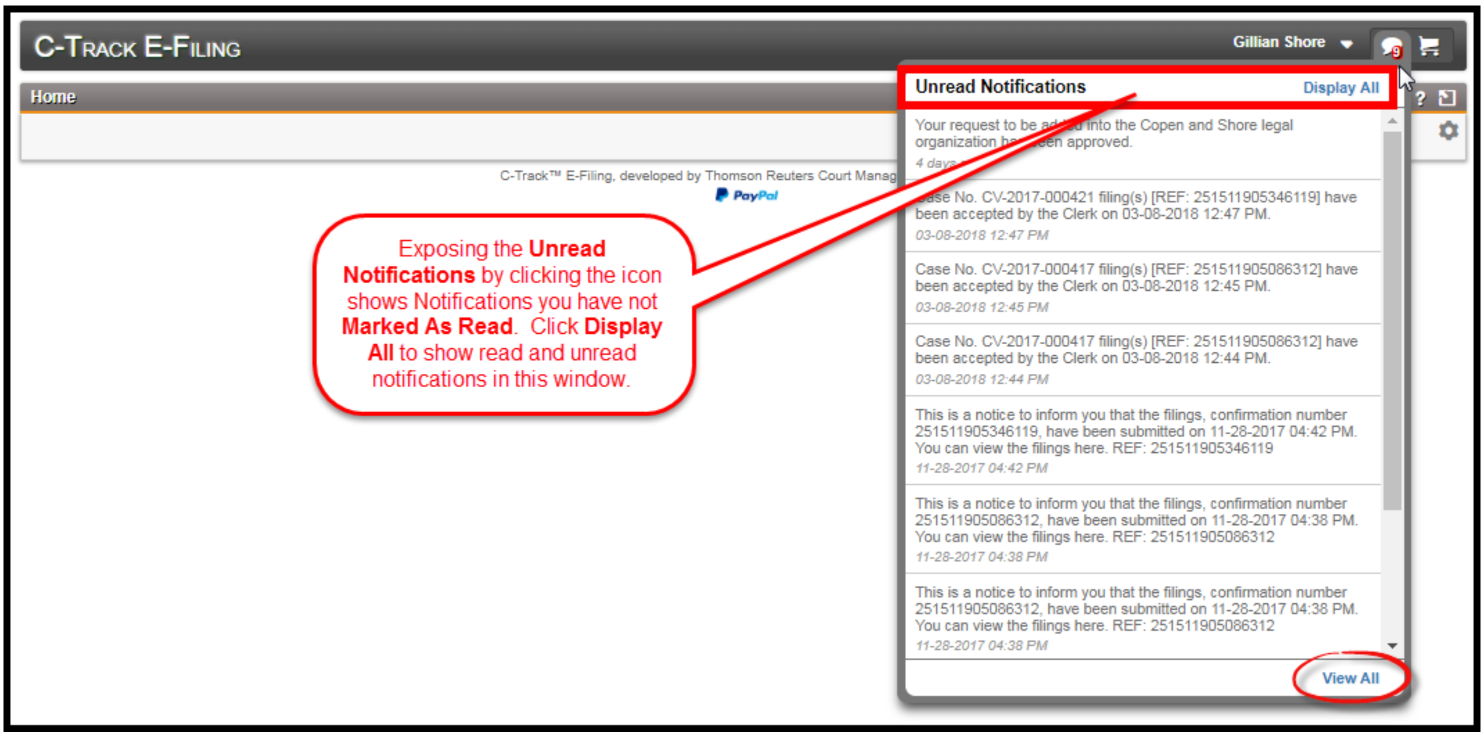


Fig. 1.27: Home screen – Notifications for the user - **Notifications** exposed

2. Click **View All**.

The **Notifications** screen appears.

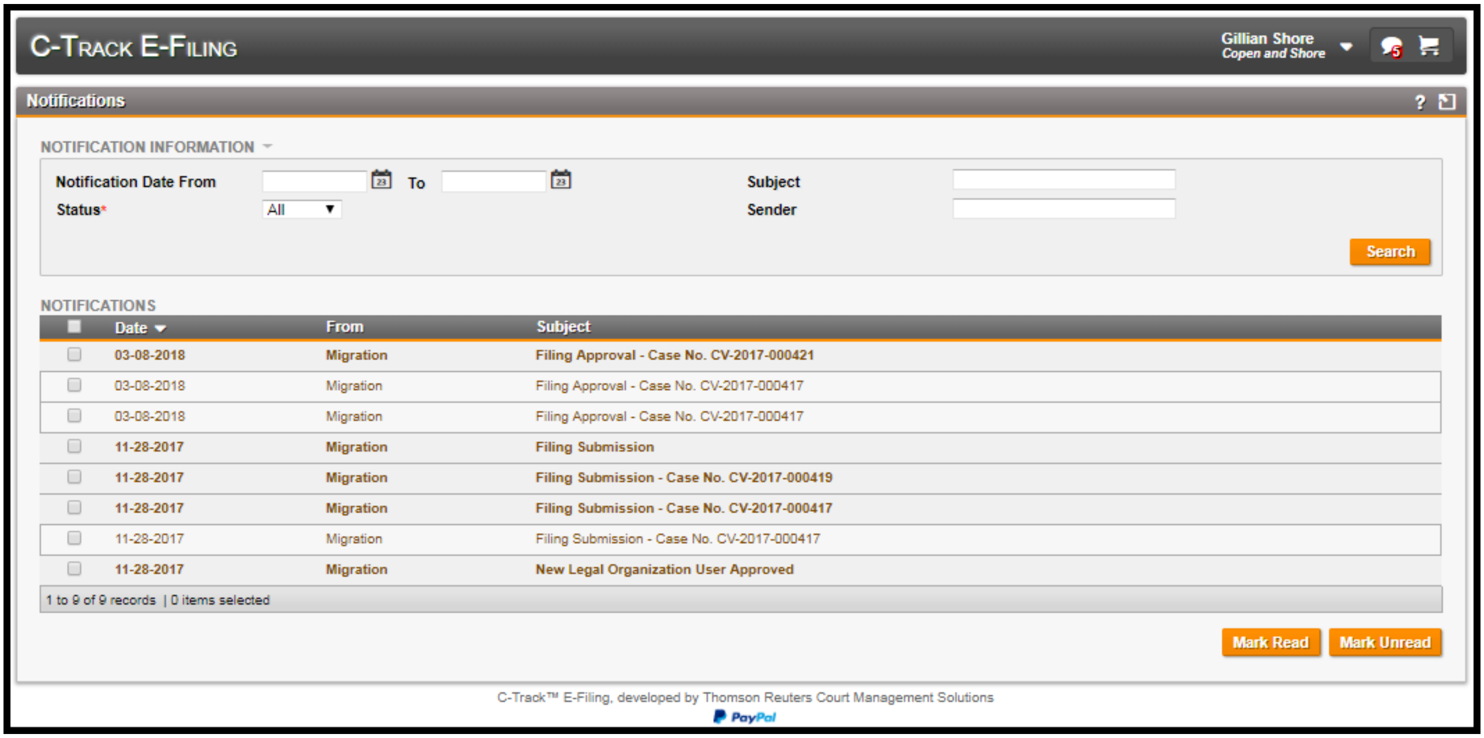


Fig. 1.28: Notifications screen

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.

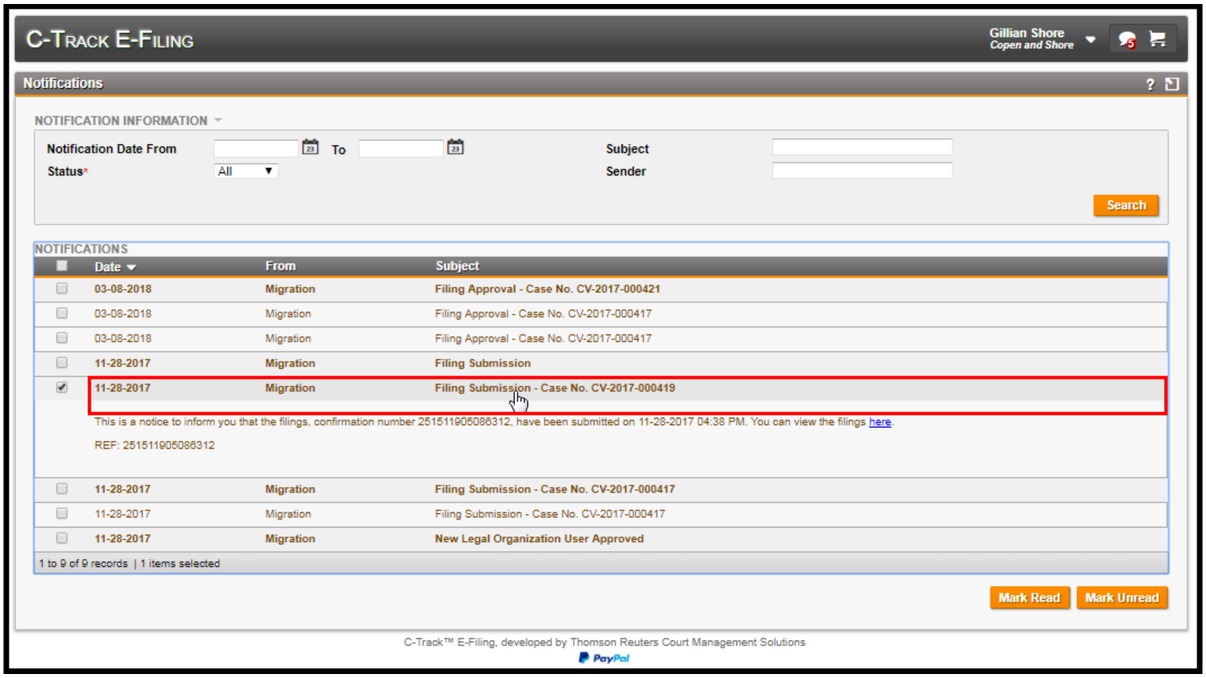


Fig. 1.29: Notifications message expanded

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.

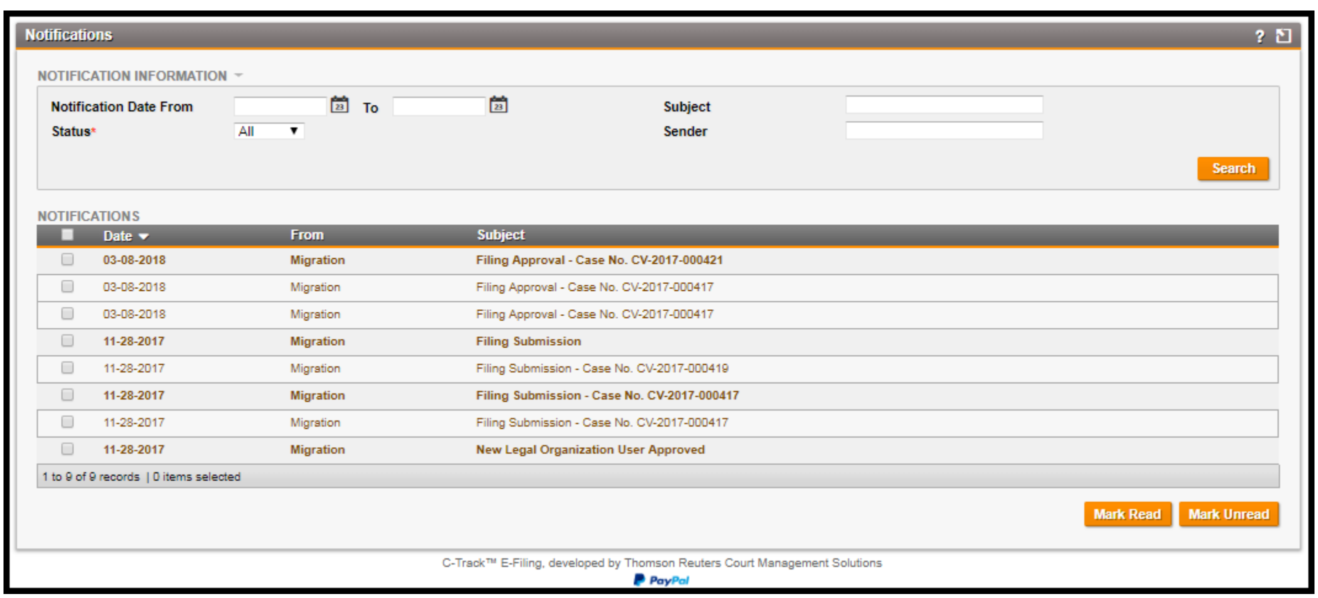


Fig. 1.30: Notifications message read

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

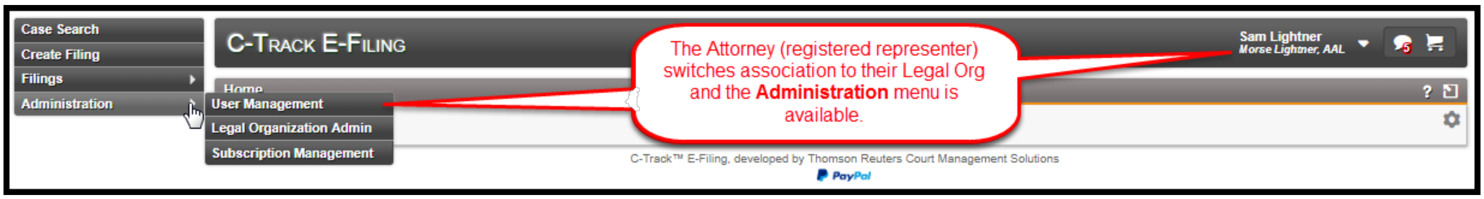


Fig. 1.32: Home screen – Menu for Attorney Legal Org Admin not associated to Legal Org

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

The **Legal Organization Search** screen appears.

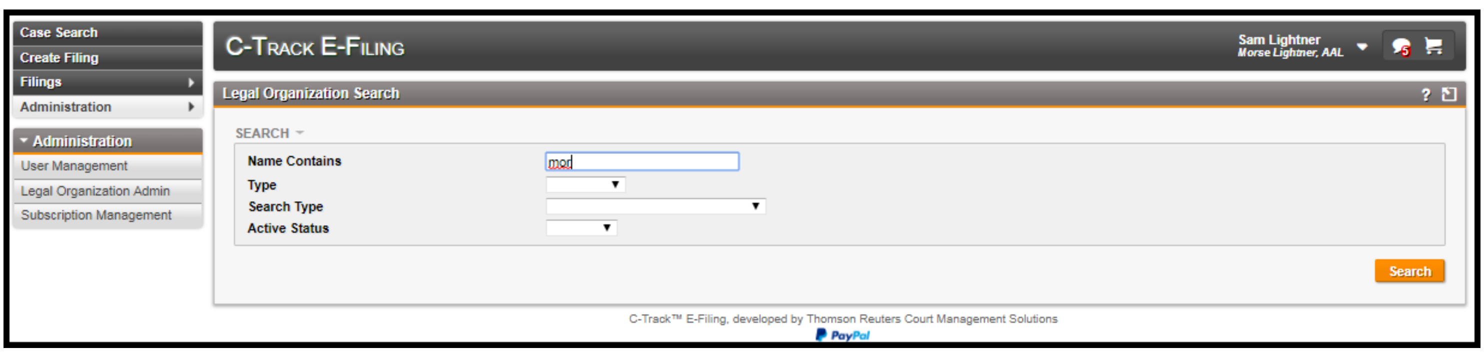


Fig. 1.33: Legal Organization Search screen

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.

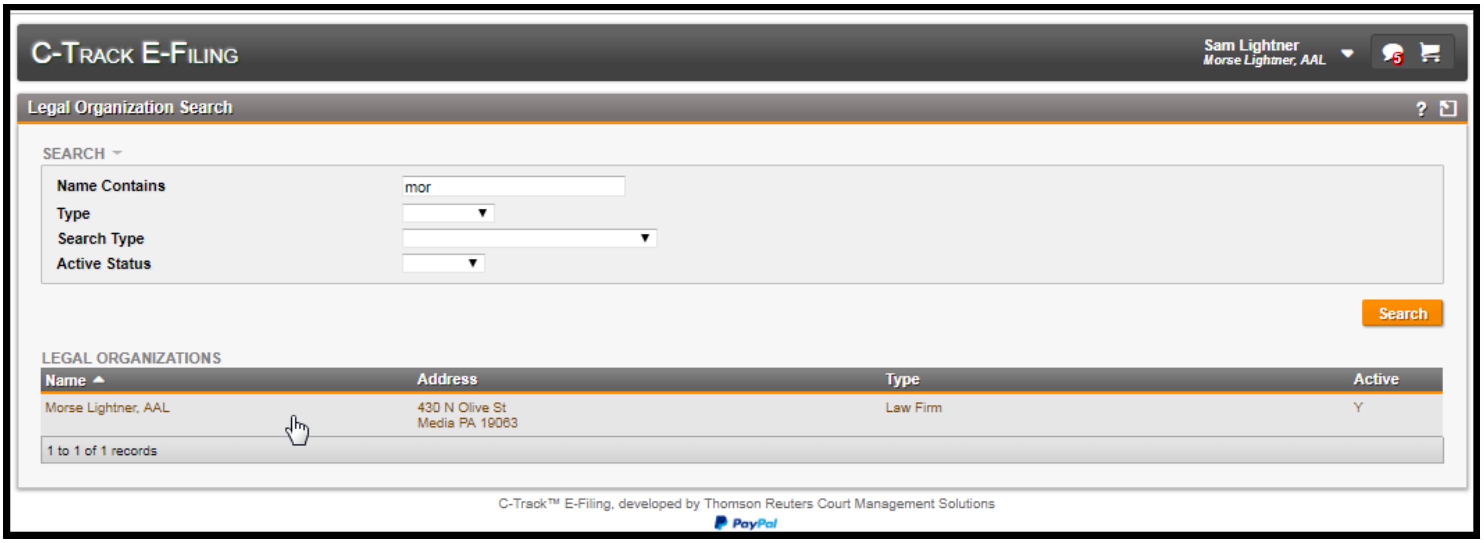


Fig. 1.34: Legal Organization Search screen - **Legal Organizations** display table

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.

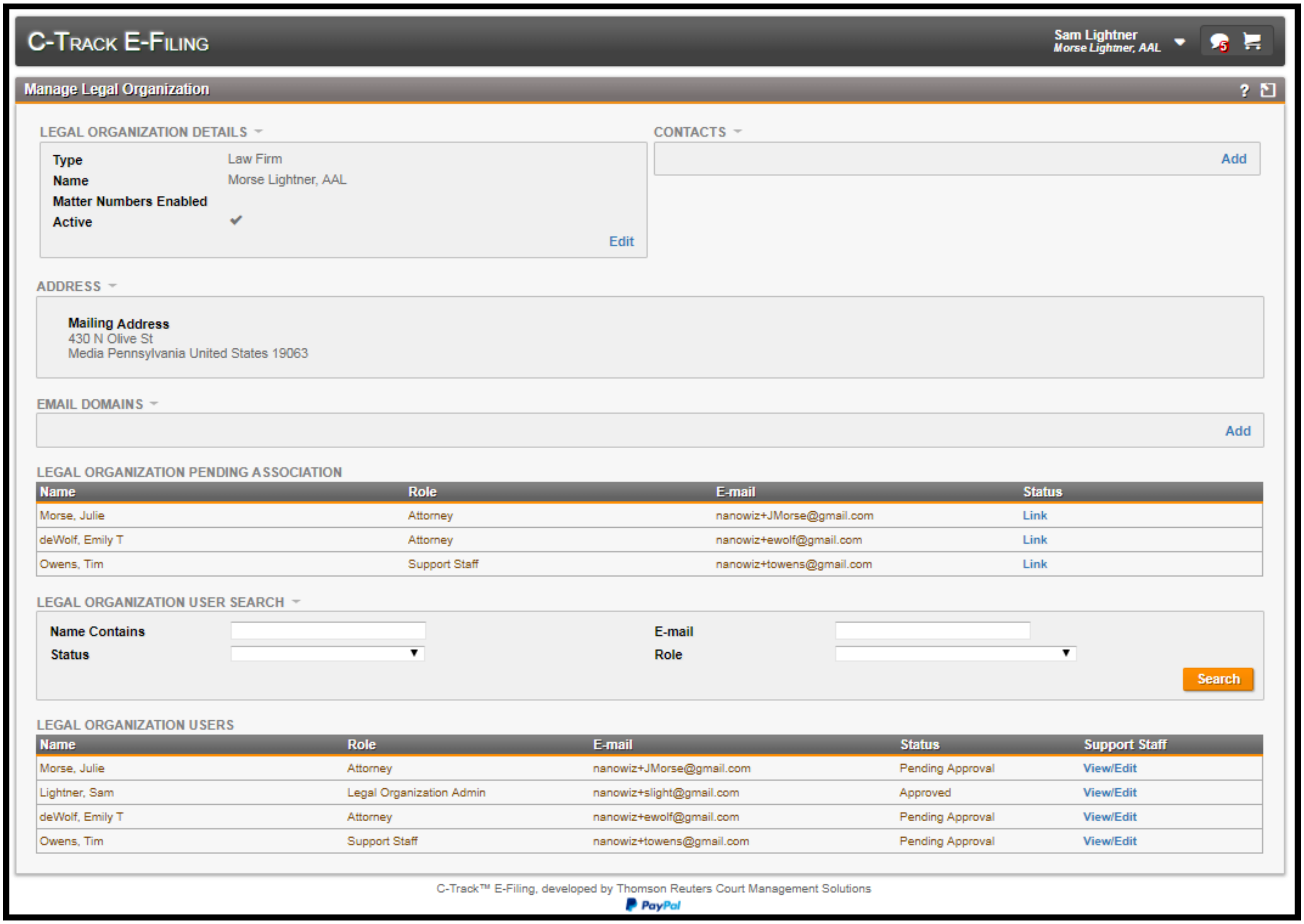


Fig. 1.35: Manage Legal Organization screen

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.

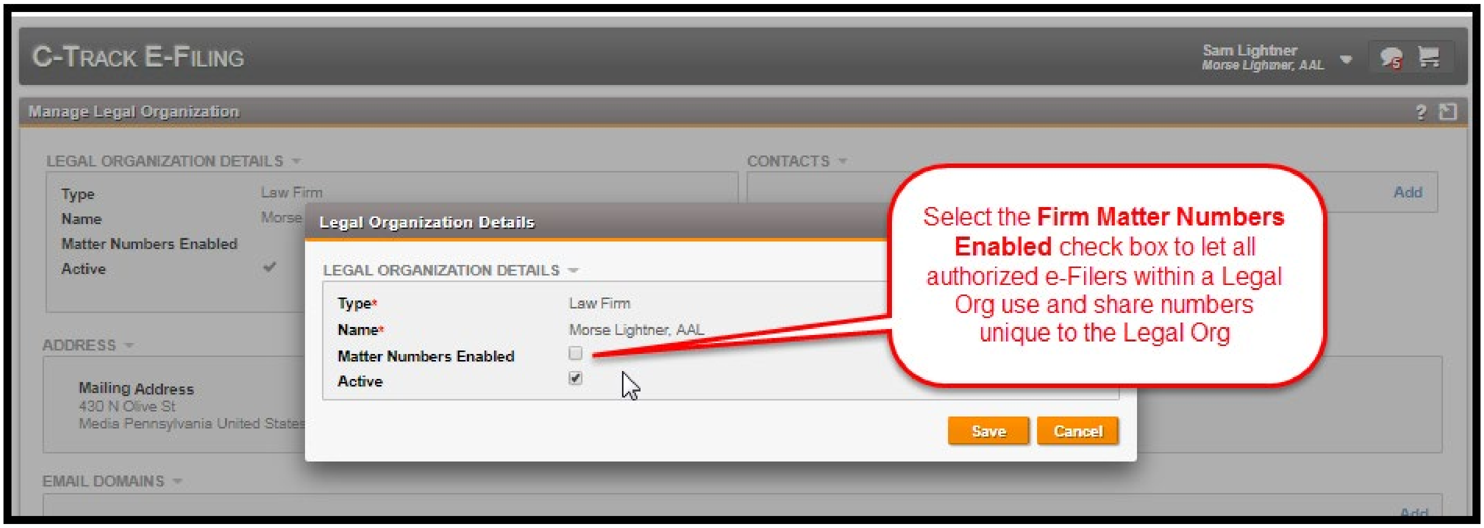


Fig. 1.36: Legal Organization Details window

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.

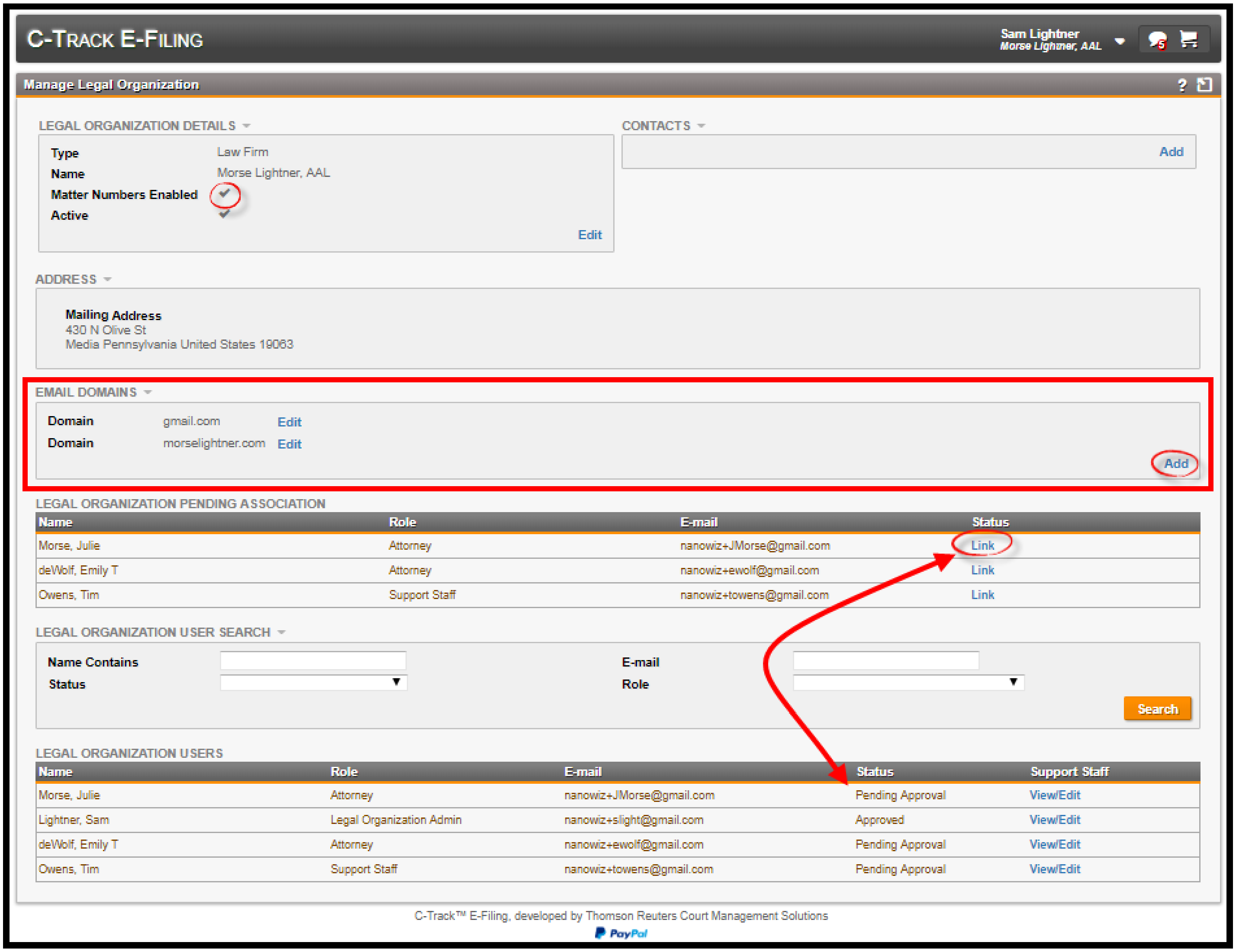


Fig. 1.37: Manage Legal Organization screen - **Legal Organization Users** searched

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

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

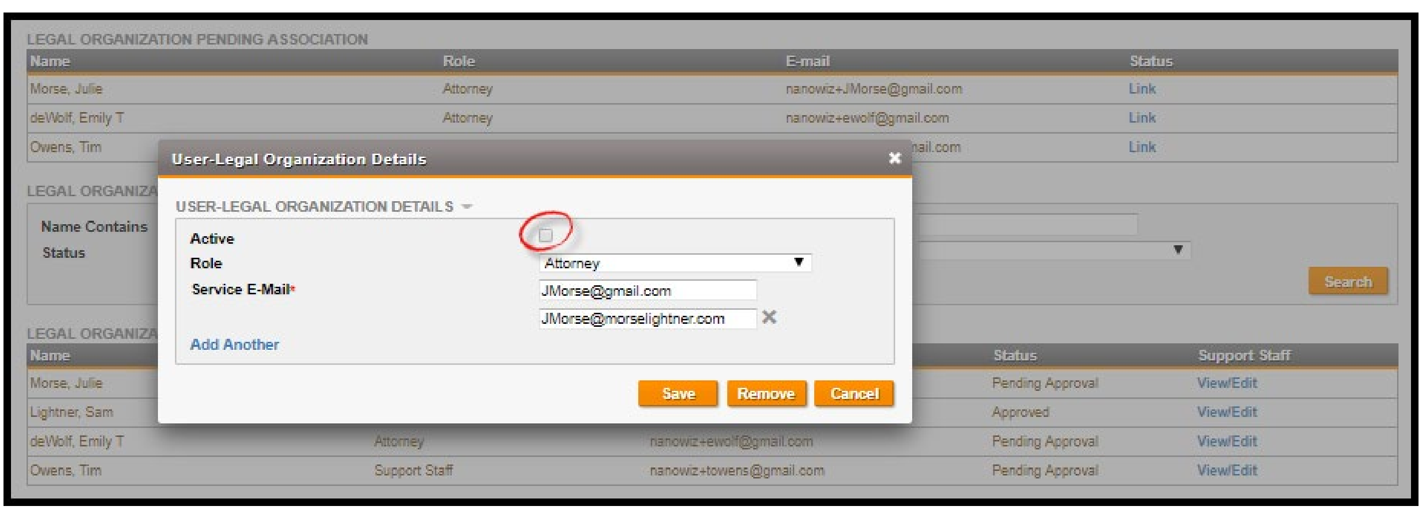


Fig. 1.38: User – Legal Organization Details window

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.

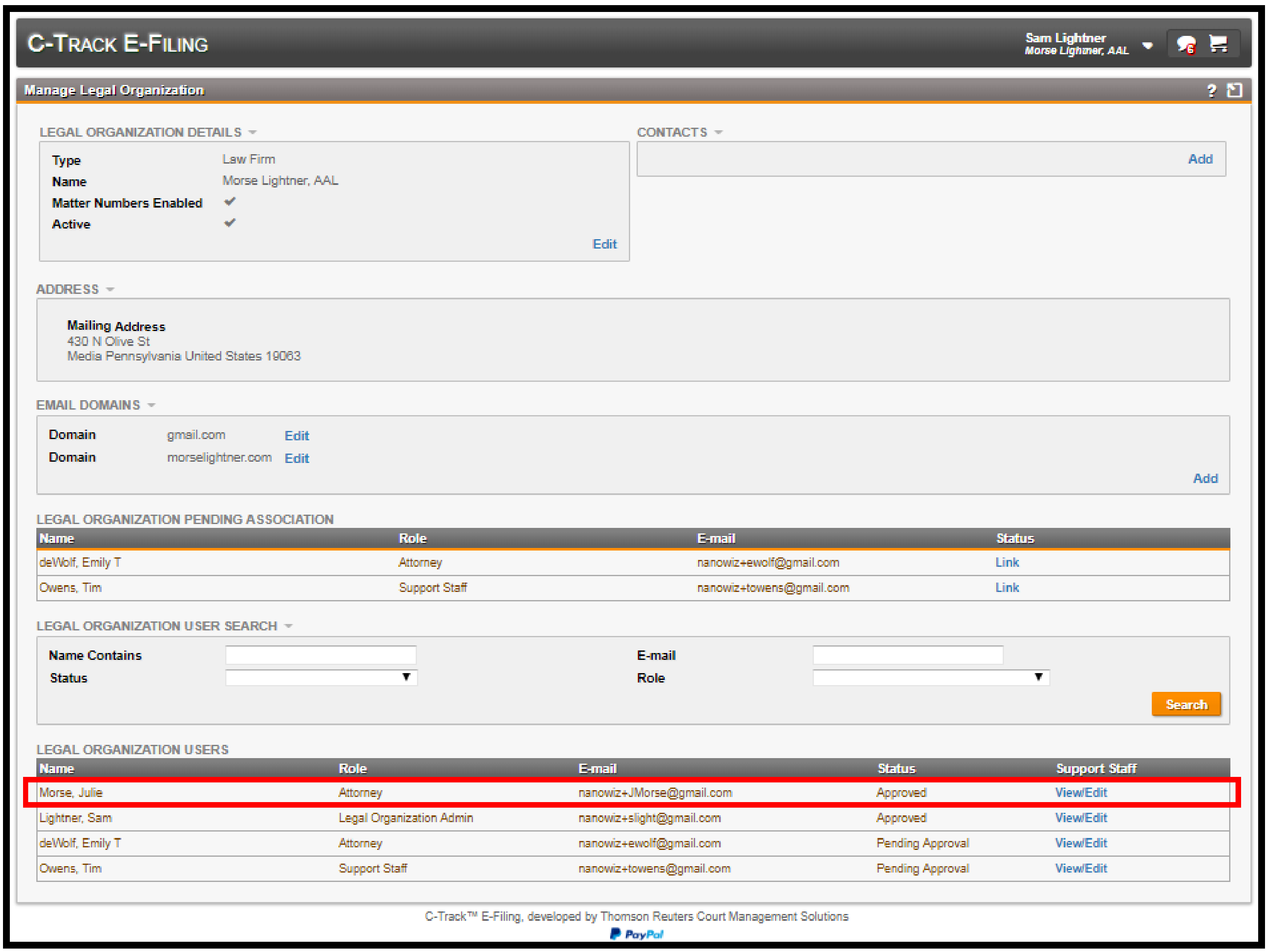


Fig. 1.39: Manage Legal Organization screen

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

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

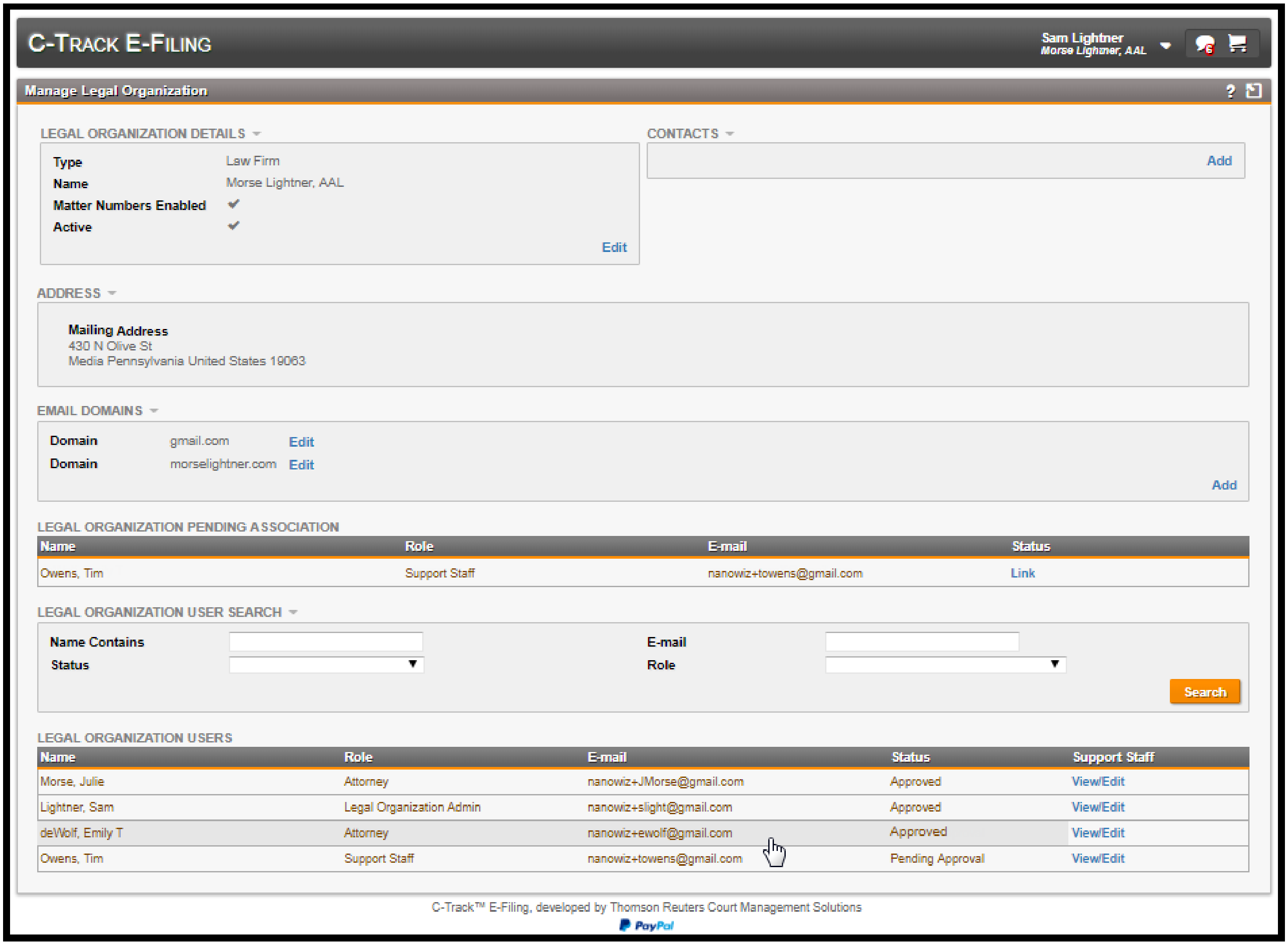


Fig. 1.40: Manage Legal Organization screen

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.

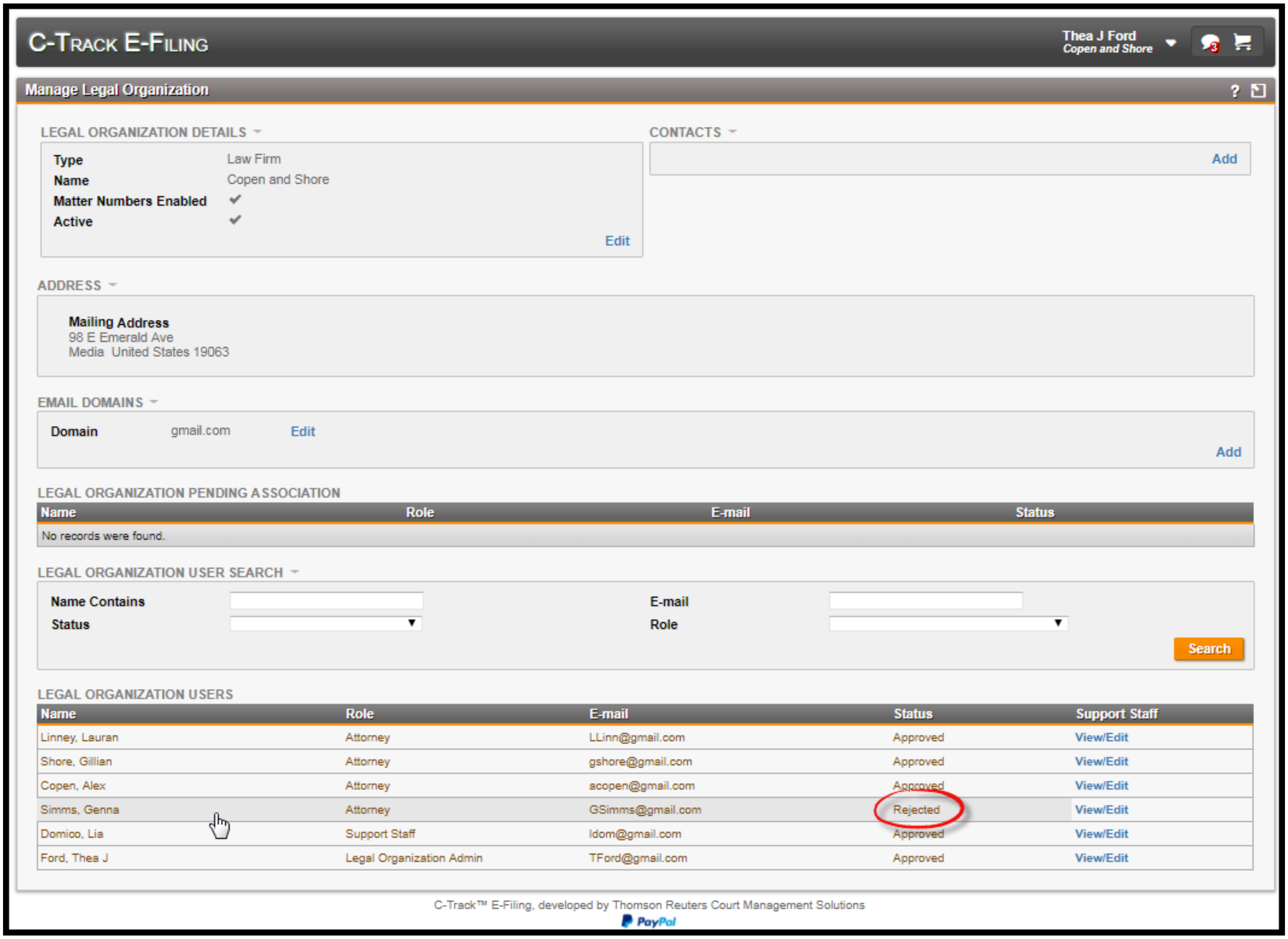


Fig. 1.41: Manage Legal Organization screen

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.

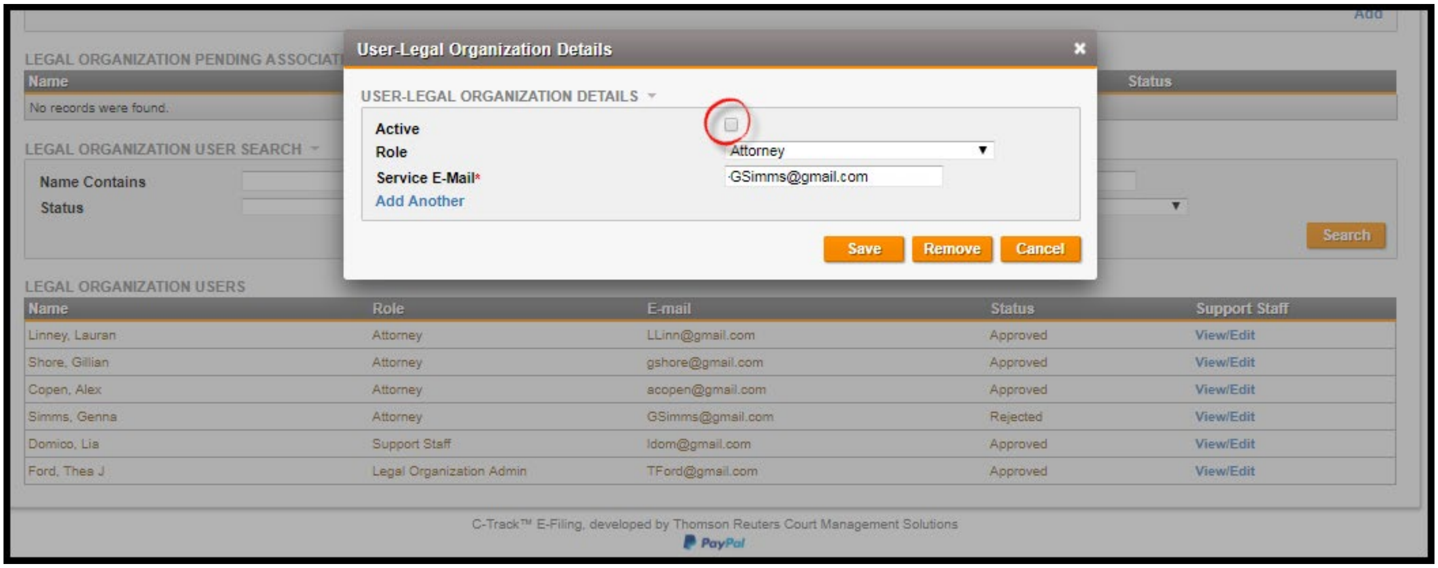


Fig. 1.42: User – Legal Organization Details window

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.

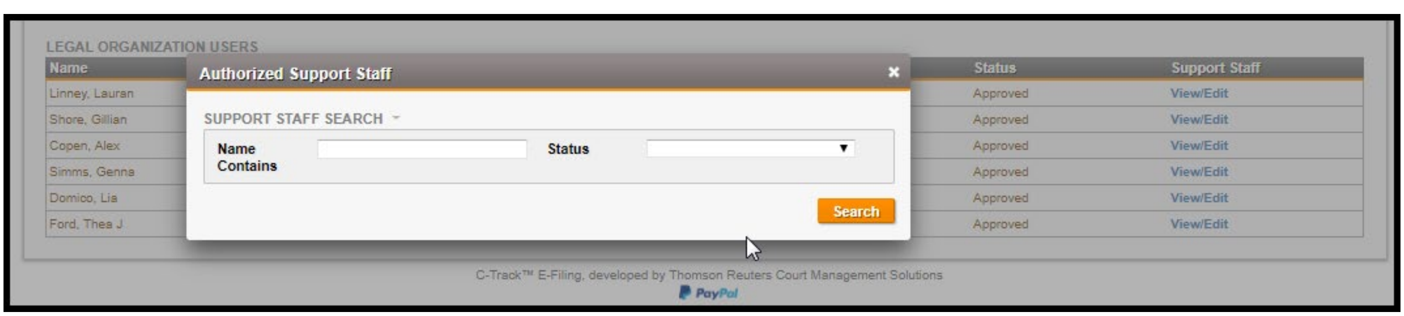


Fig. 1.44: Authorized Support Staff window

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.

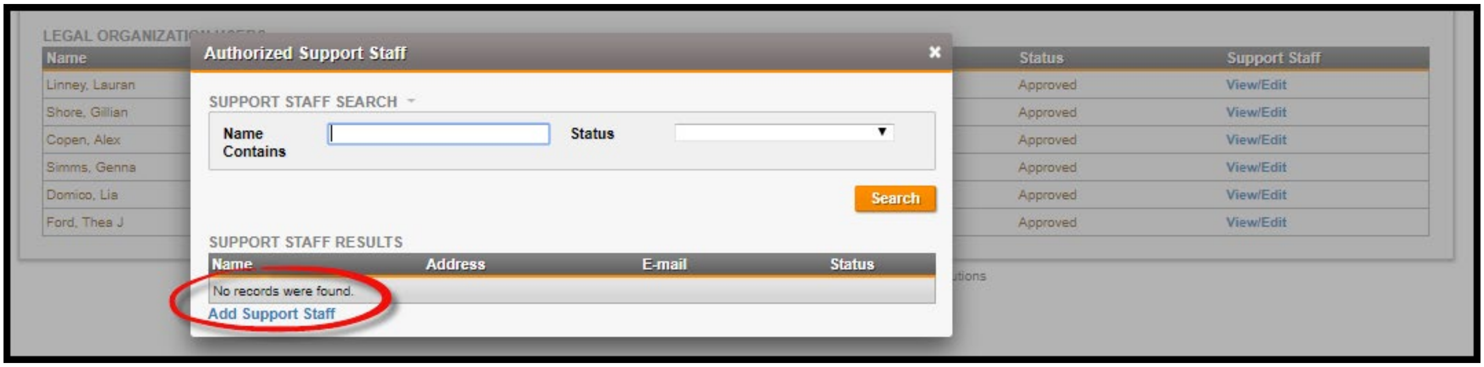


Fig. 1.45: Support Staff Results display table - **Add Support Staff** link

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

The **Add Support Staff** window appears.

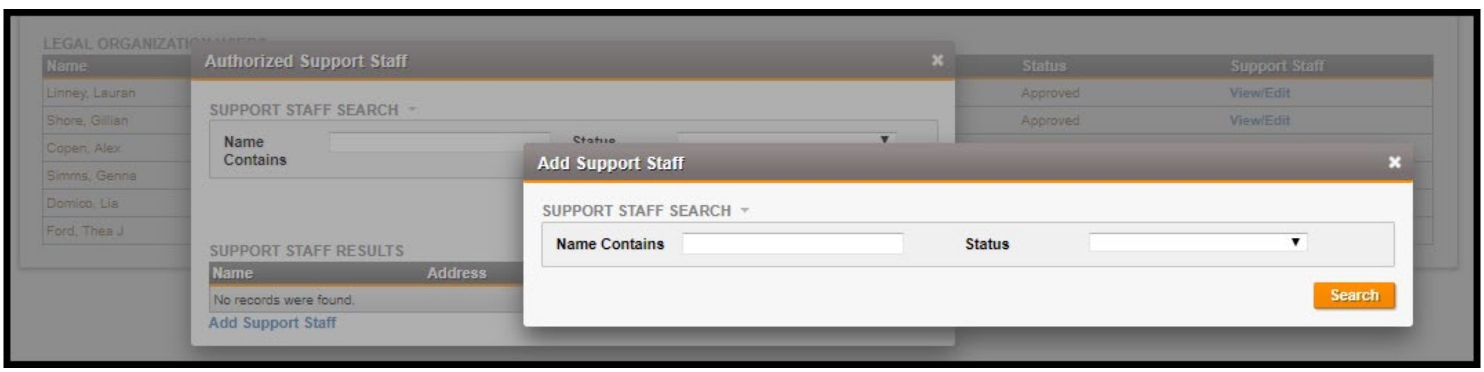


Fig. 1.46: Add Support Staff window

22. Click **Search**.

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

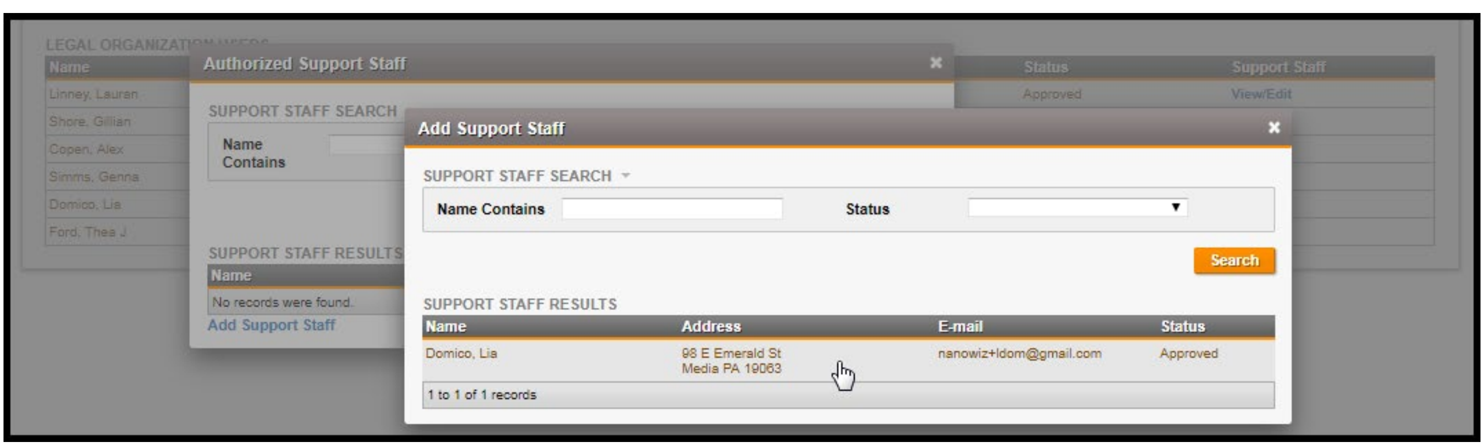


Fig. 1.47: Add Support Staff results

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.

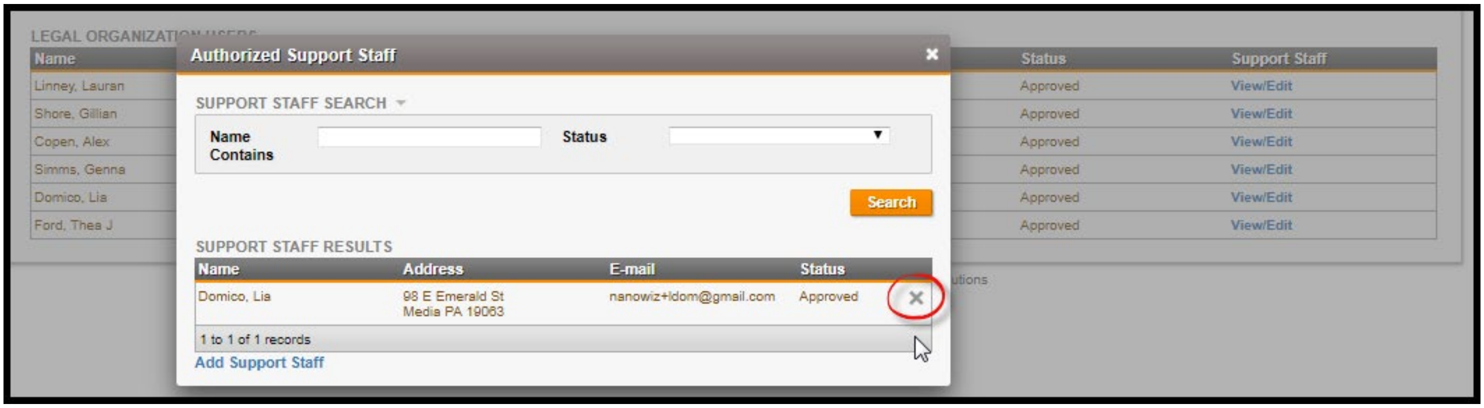


Fig. 1.48: Add Support Staff results

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.

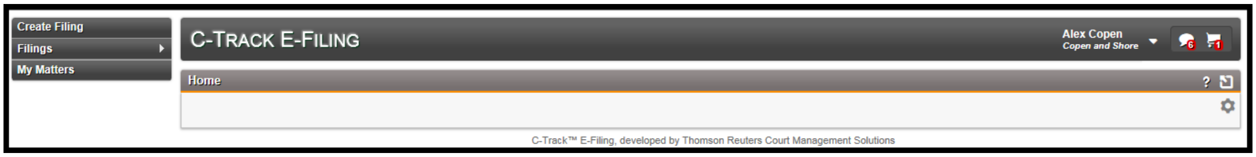


Fig. 1.49: Home screen – **User associated to Legal Organization**

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.

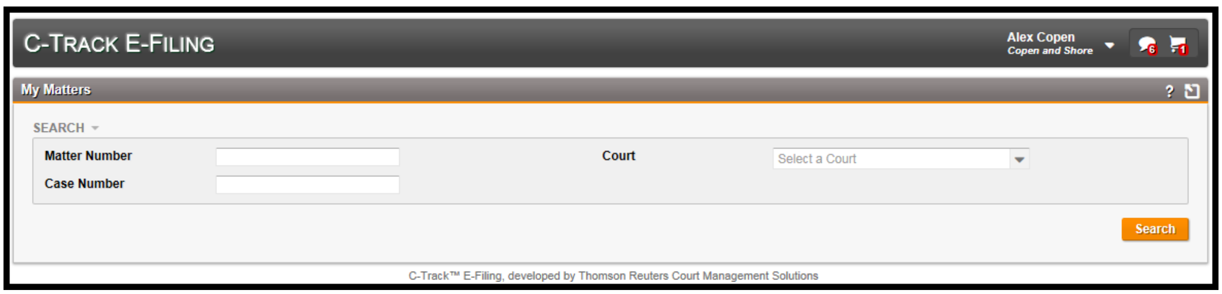


Fig. 1.50: My Matters screen

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.

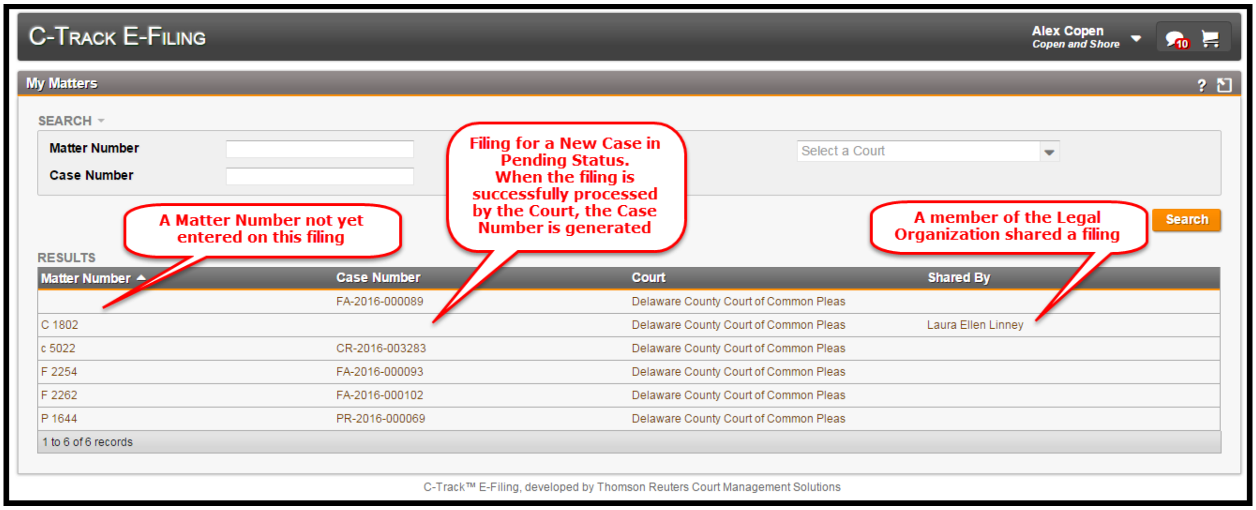


Fig. 1.51: My Matters screen - Search results displayed

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**.

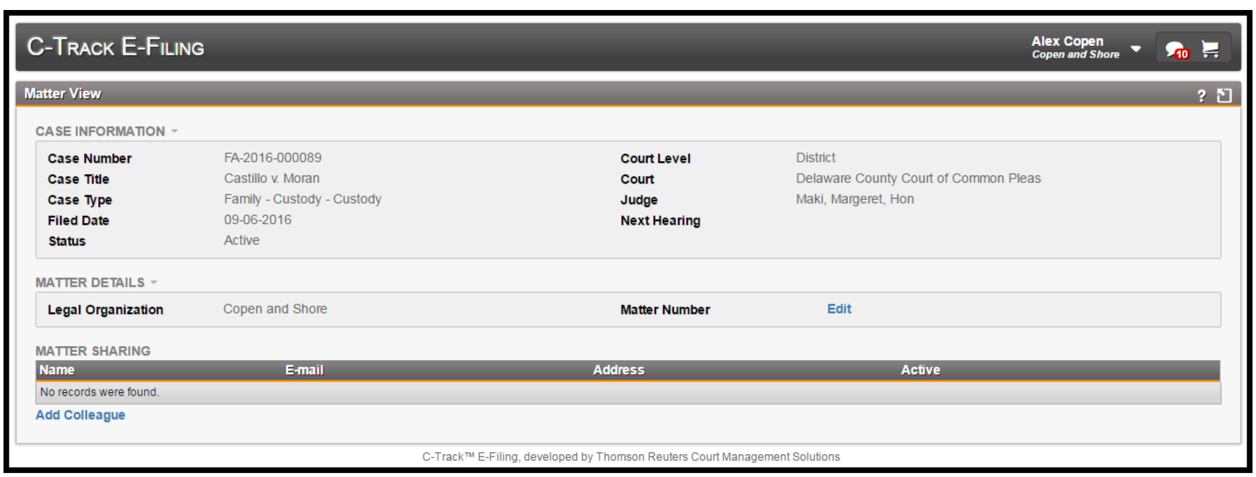


Fig. 1.52: Matter View screen

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.

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

The **Edit Matter** window appears.

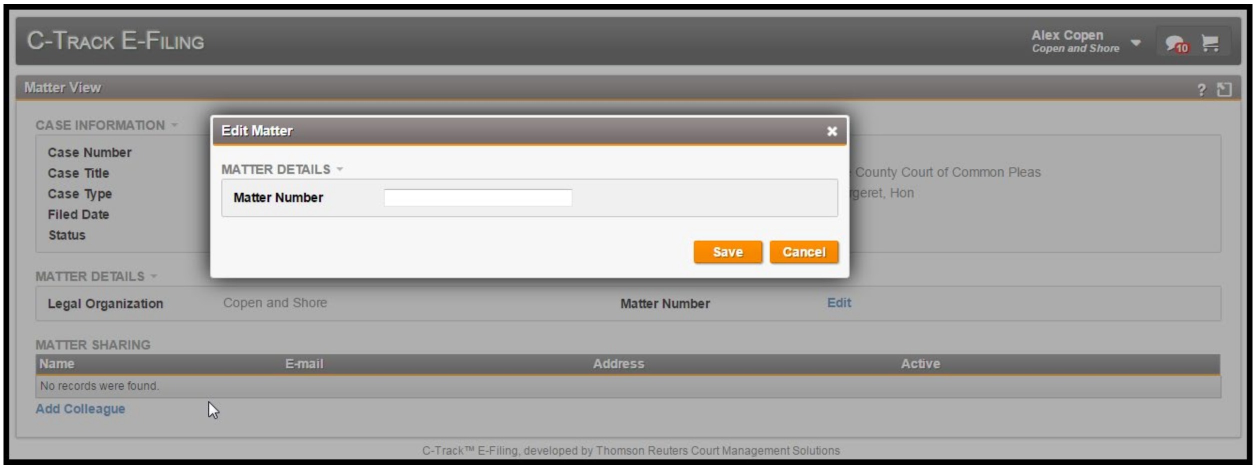


Fig. 1.53: Edit Matter window

5. Enter a **Matter Number**.
6. Click **Save**.

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

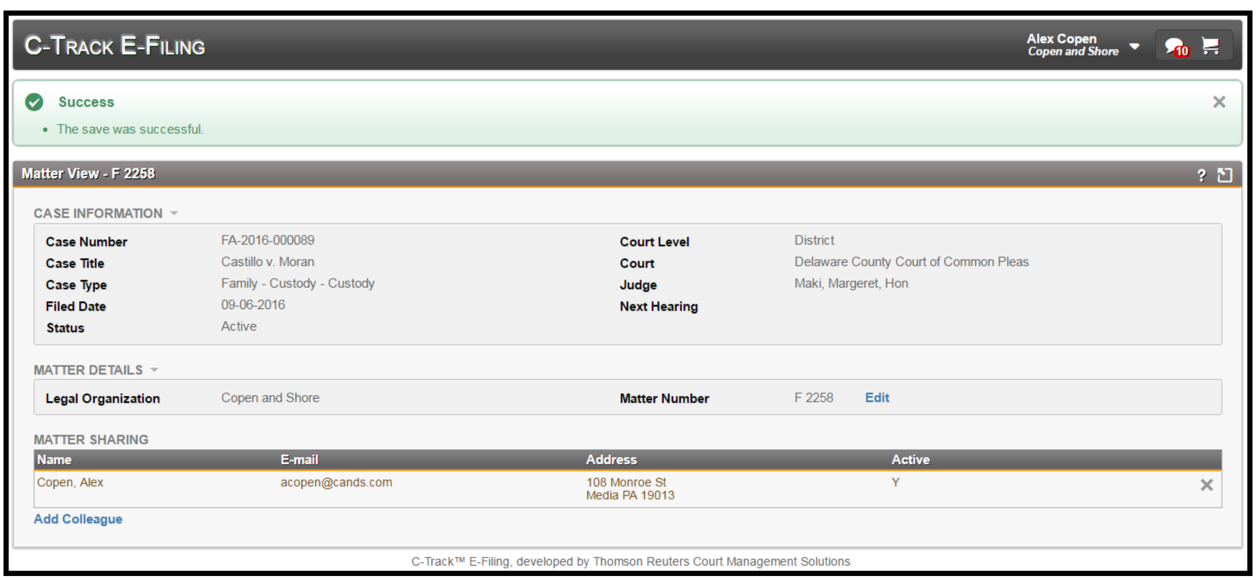


Fig. 1.54: Matter View screen – successful save of Matter Number

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.

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

The **Add Colleague** window appears.

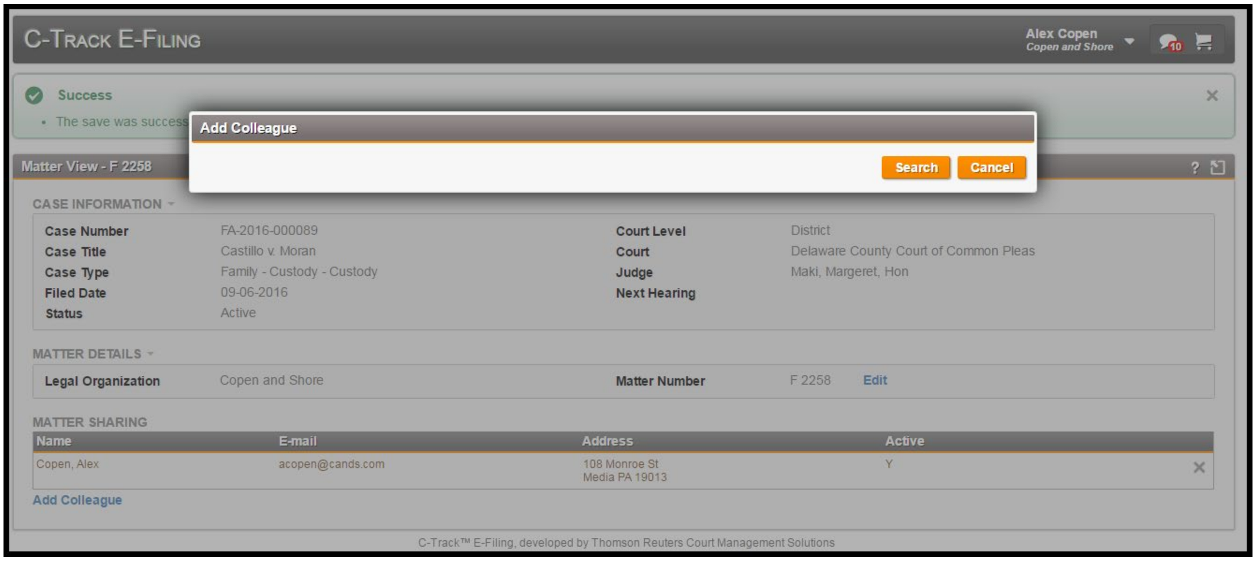


Fig. 1.55: Add Colleague window

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.

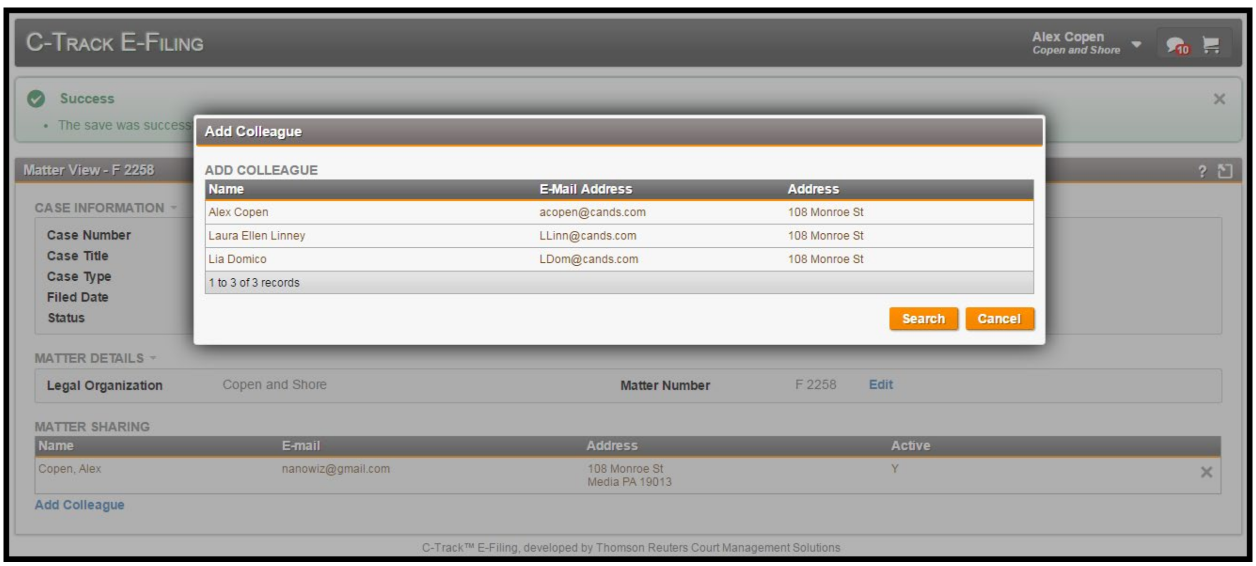


Fig. 1.56: Add Colleague window – Legal Org members display

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.

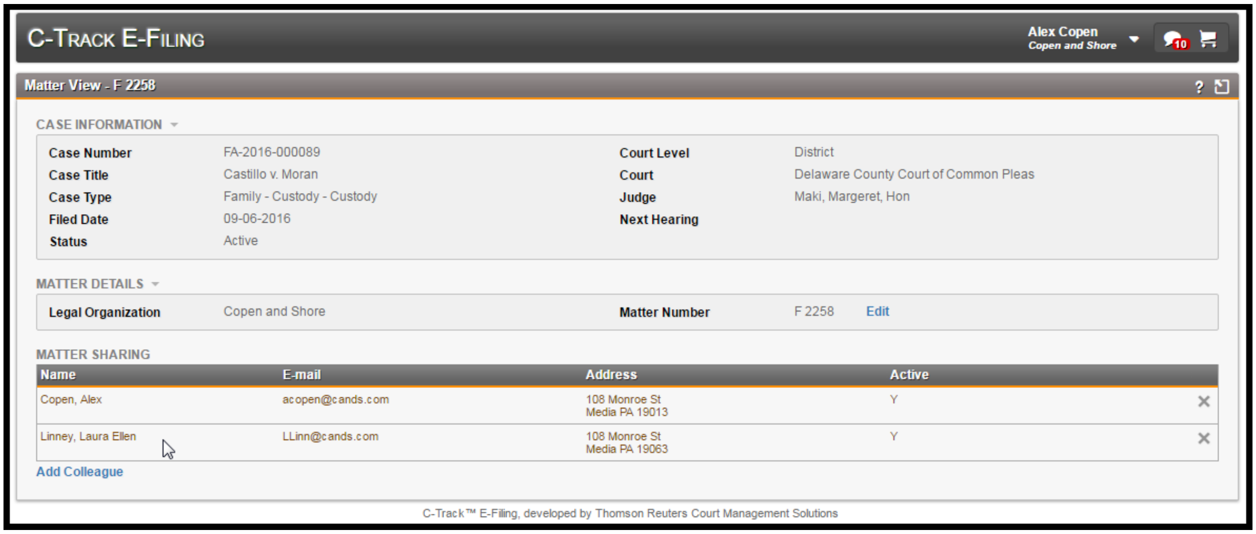


Fig. 1.57: Add Colleague window – Legal Org members display

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.

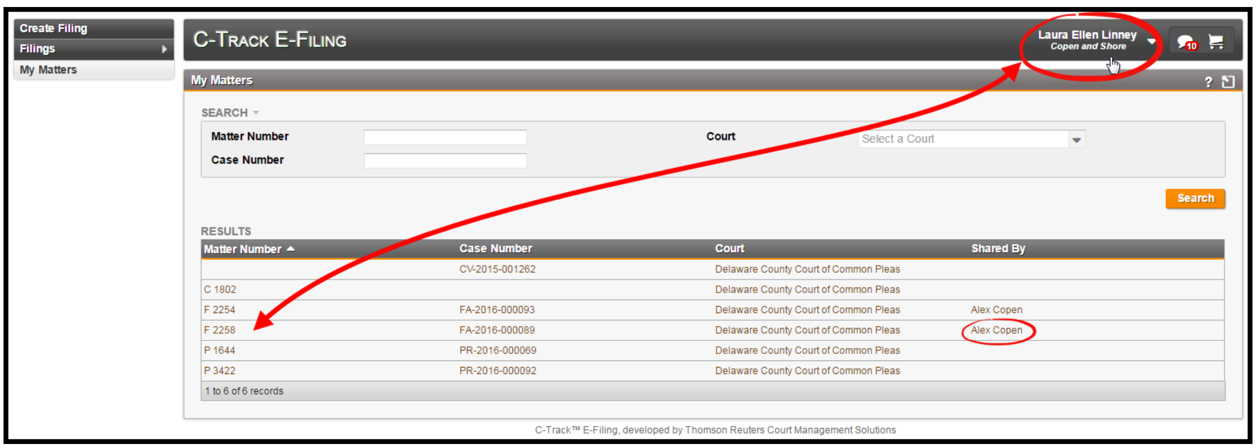


Fig. 1.58: My Matters screen – Shared Matter

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.

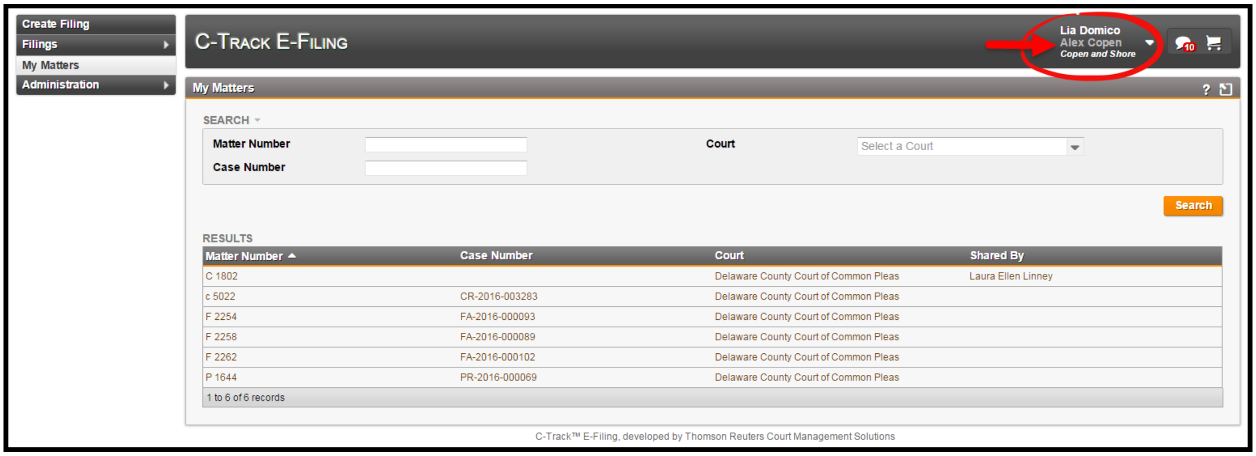


Fig. 1.59: My Matters screen – Support Staff

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.

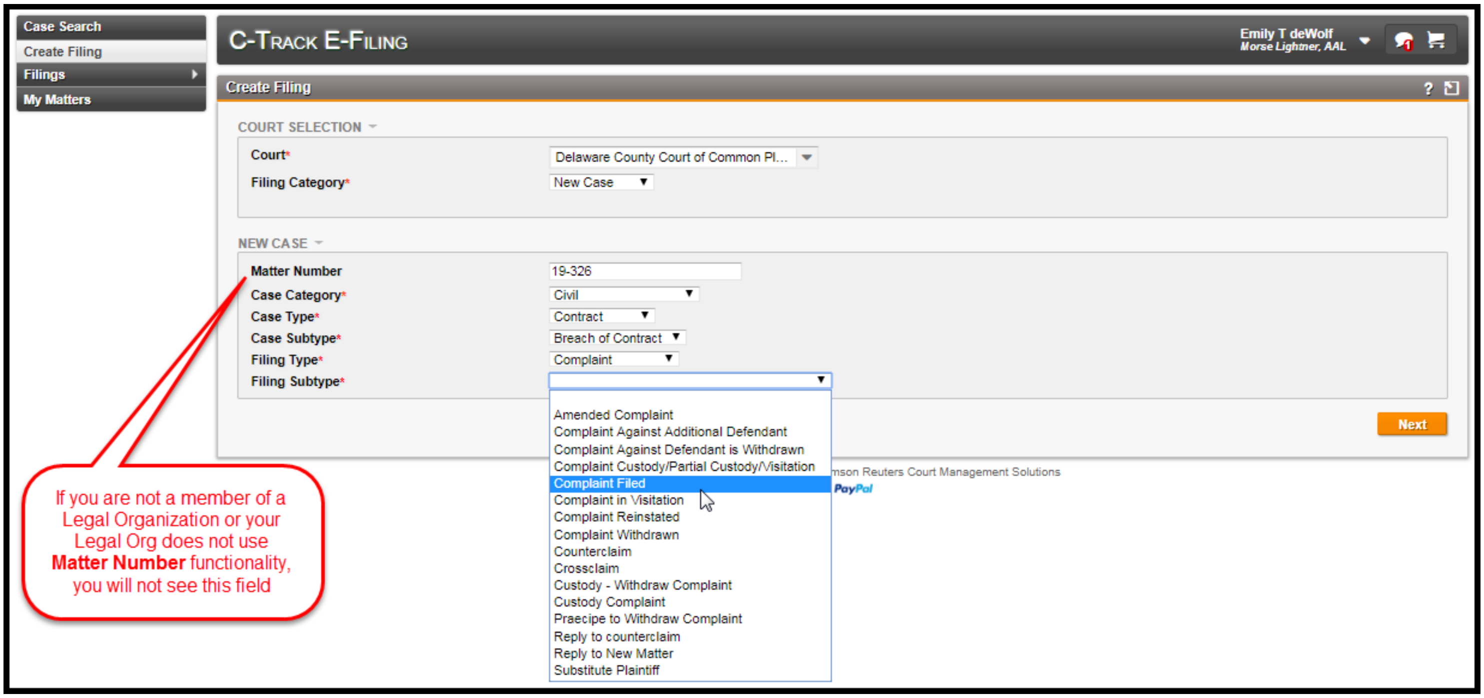


Fig. 1.61: New Case container – Case Category, Type, Subtype, Filing Type entered Filing Subtype exposed

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.

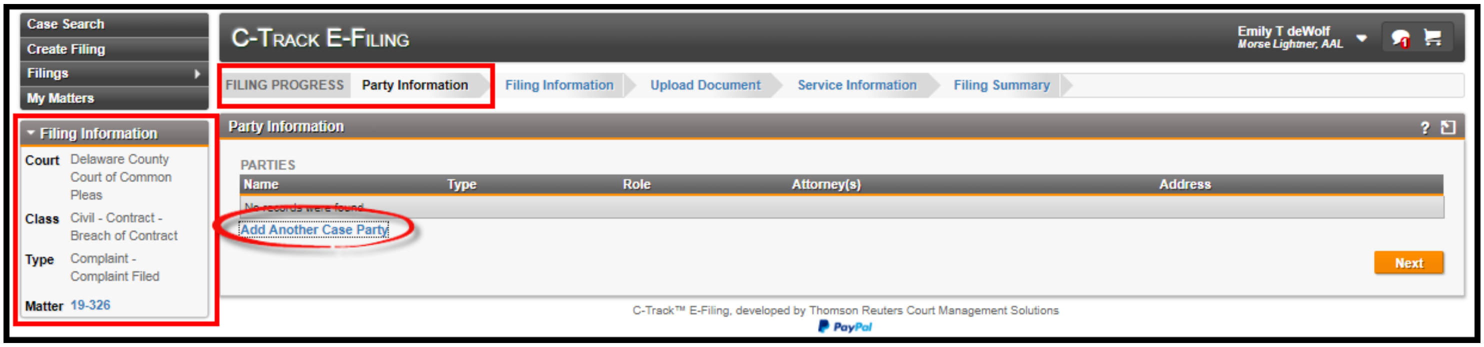


Fig. 1.62: Filing Progress– Party Information

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

The **Party Information** window appears.

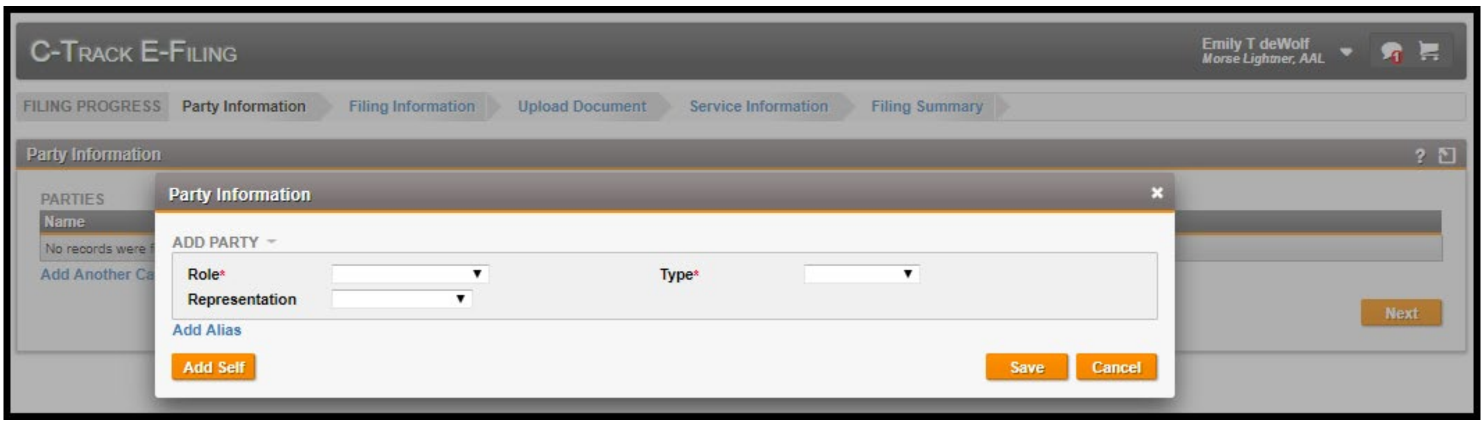


Fig. 1.63: Party Information window

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.

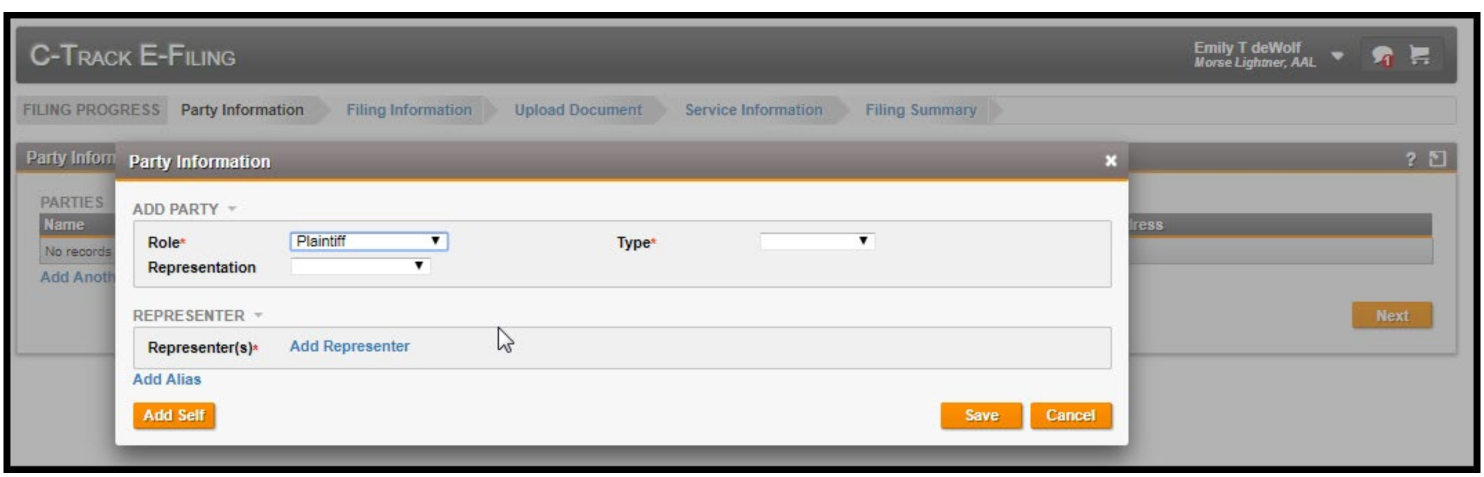


Fig. 1.64: Party Information window –containers added based on **Party** selections

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

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

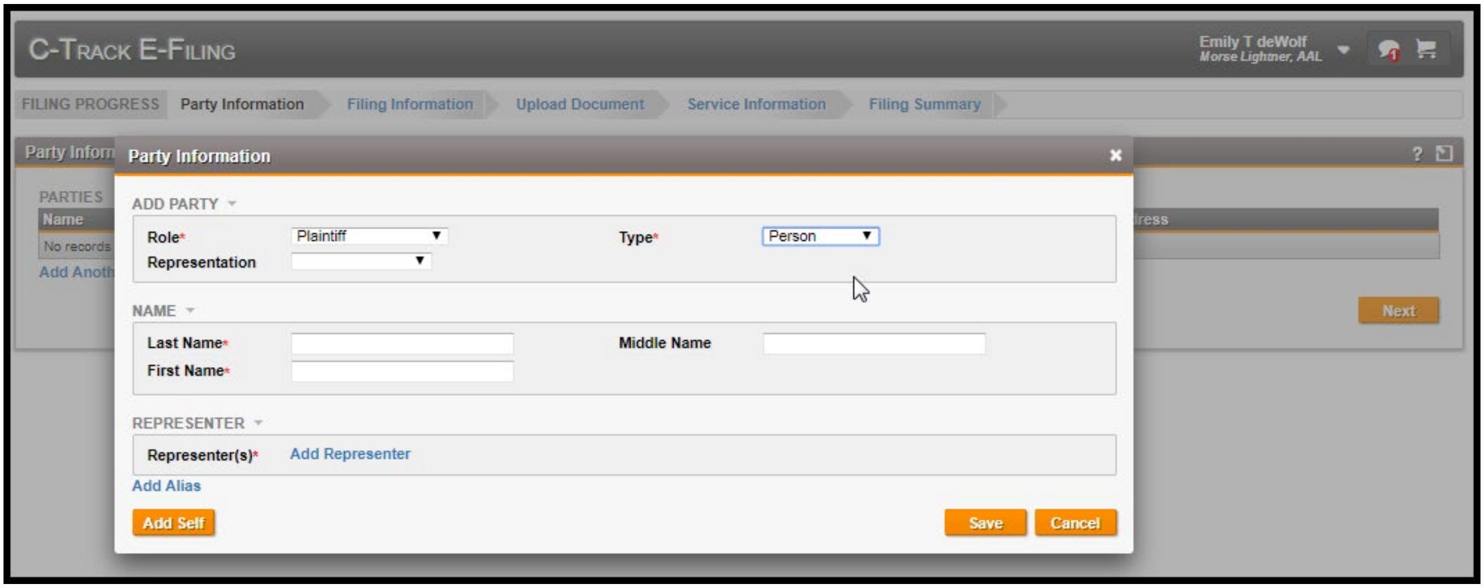


Fig. 1.65: Party Information window –containers added based on **Type** selection

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 Representer** link from the **Representer** container.

The **Representer Search** window appears.

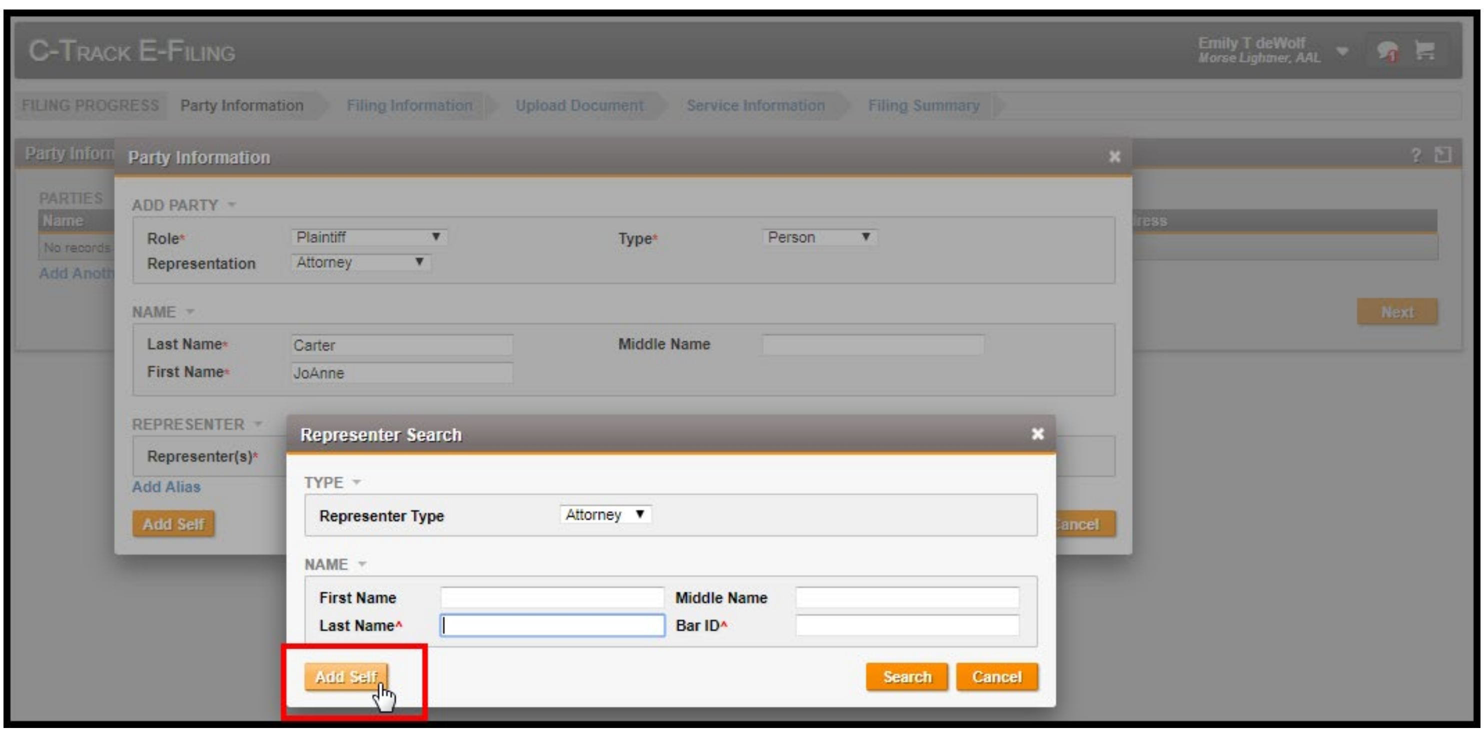


Fig. 1.66: Representer Search window

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.

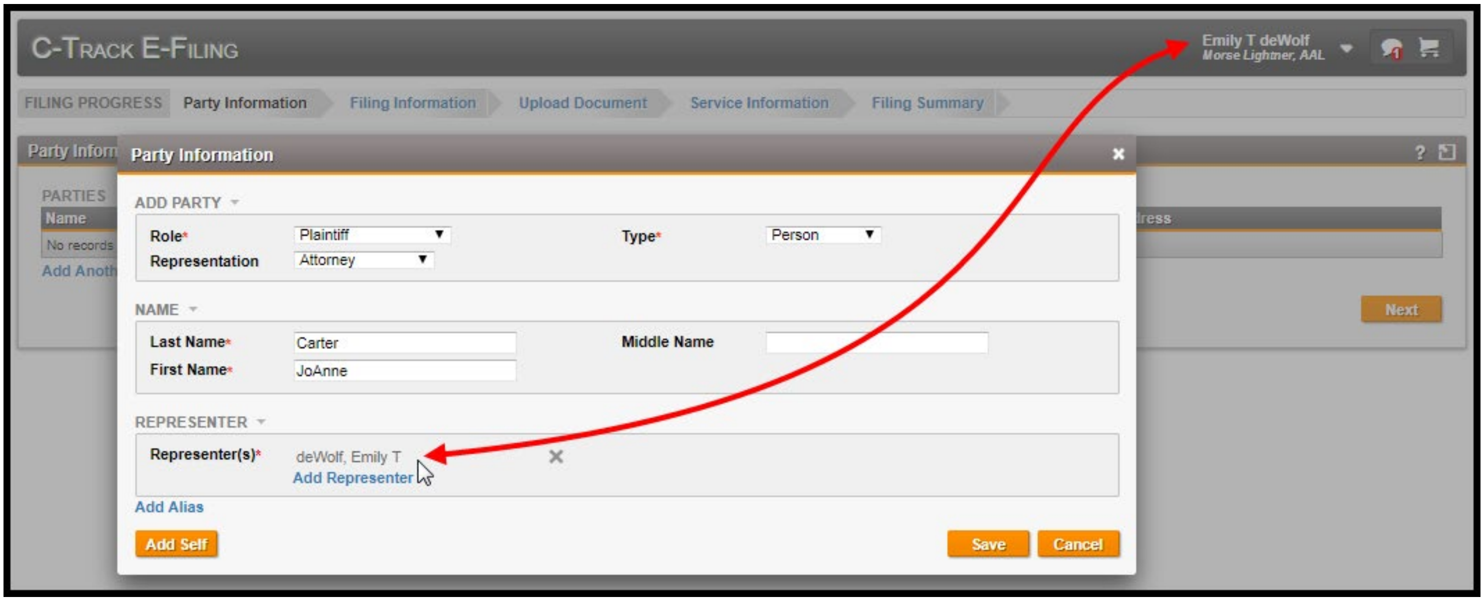


Fig. 1.67: Party Information window – **Add Self** functionality

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.

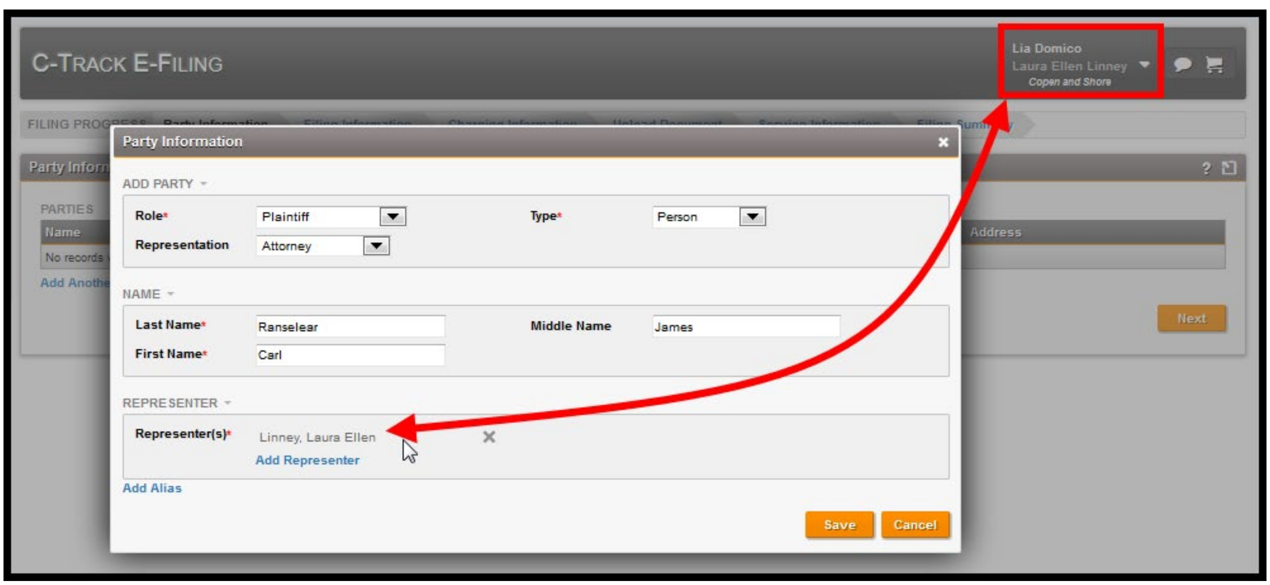


Fig. 1.68: Party Information window – support staff associated through a Legal Organization files for Attorney

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.

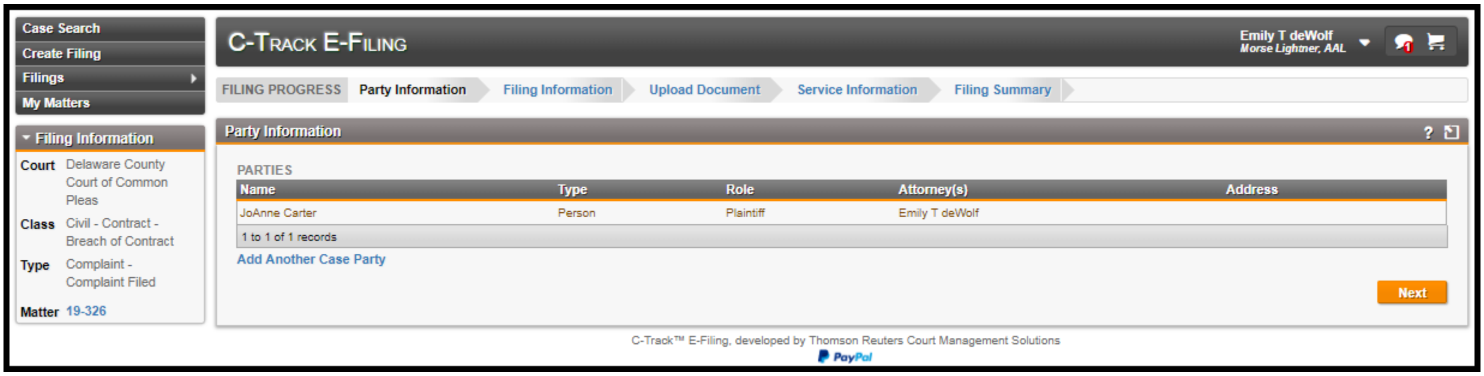


Fig. 1.69: Filing Progress screen – Party added

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**.

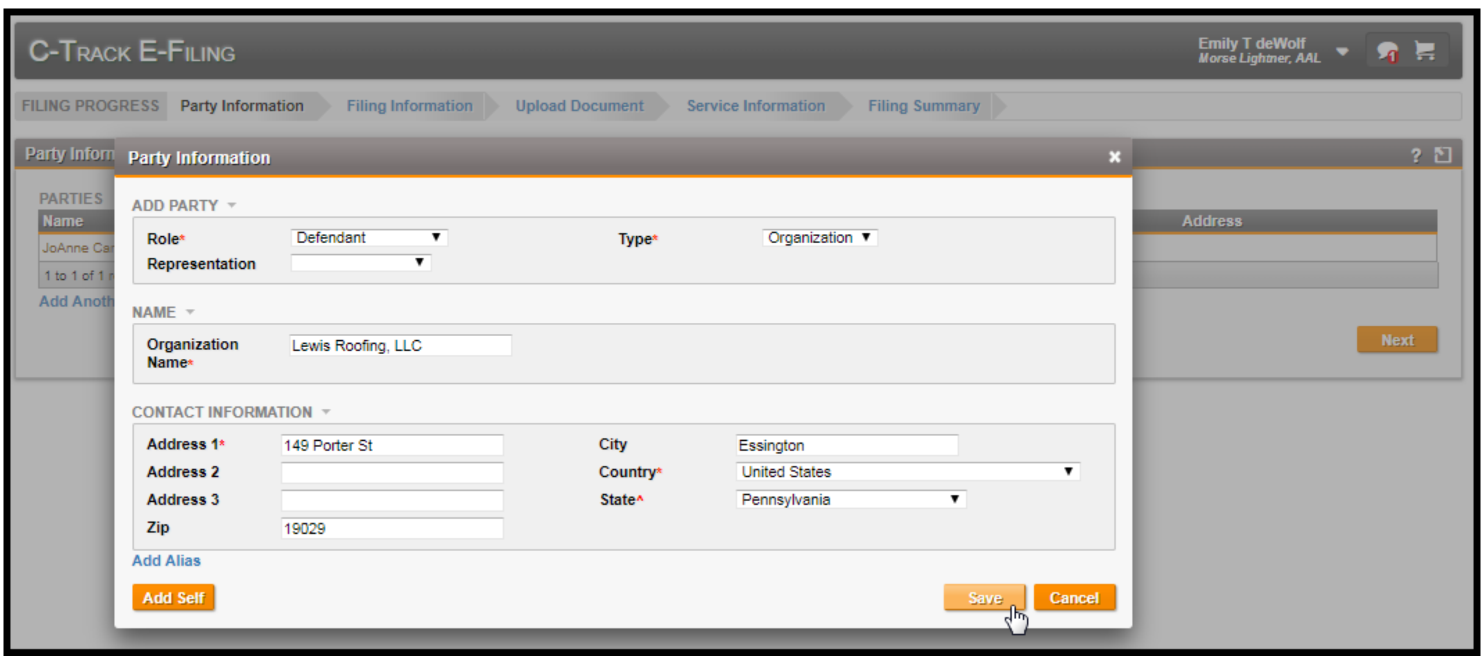


Fig. 1.70: Party Information – Party added

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.

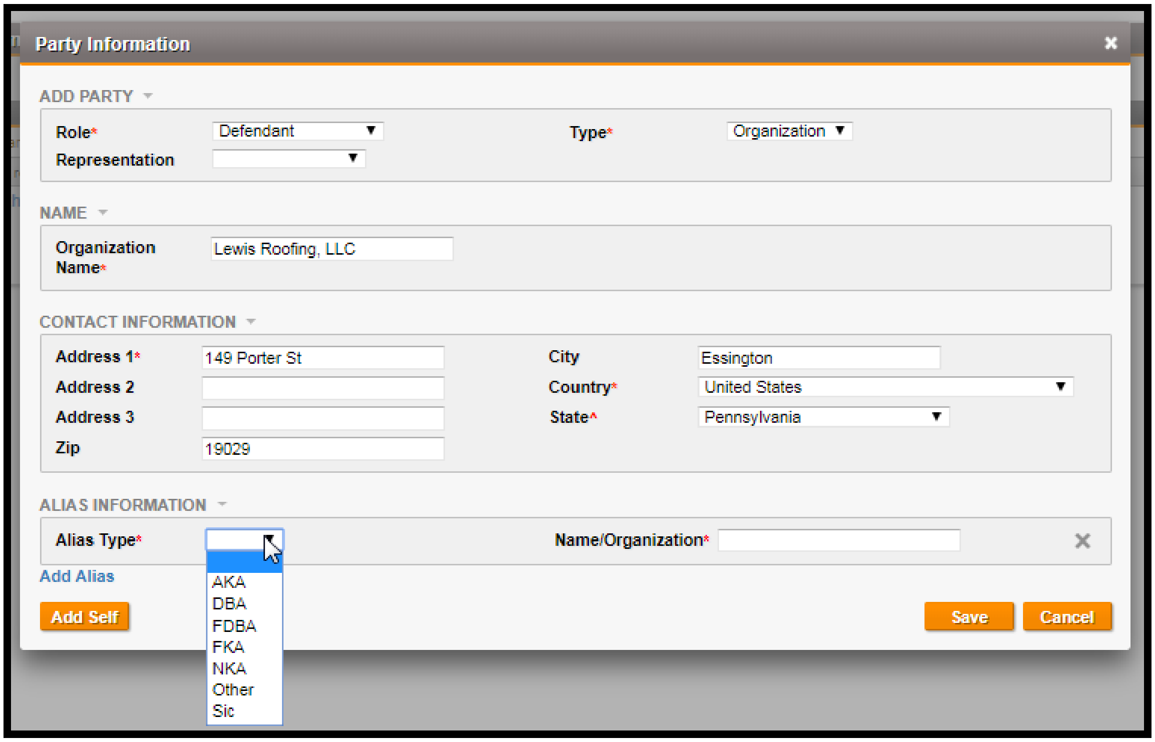


Fig. 1.71: Party Information – Alias Information container

27. Click **Save**.

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

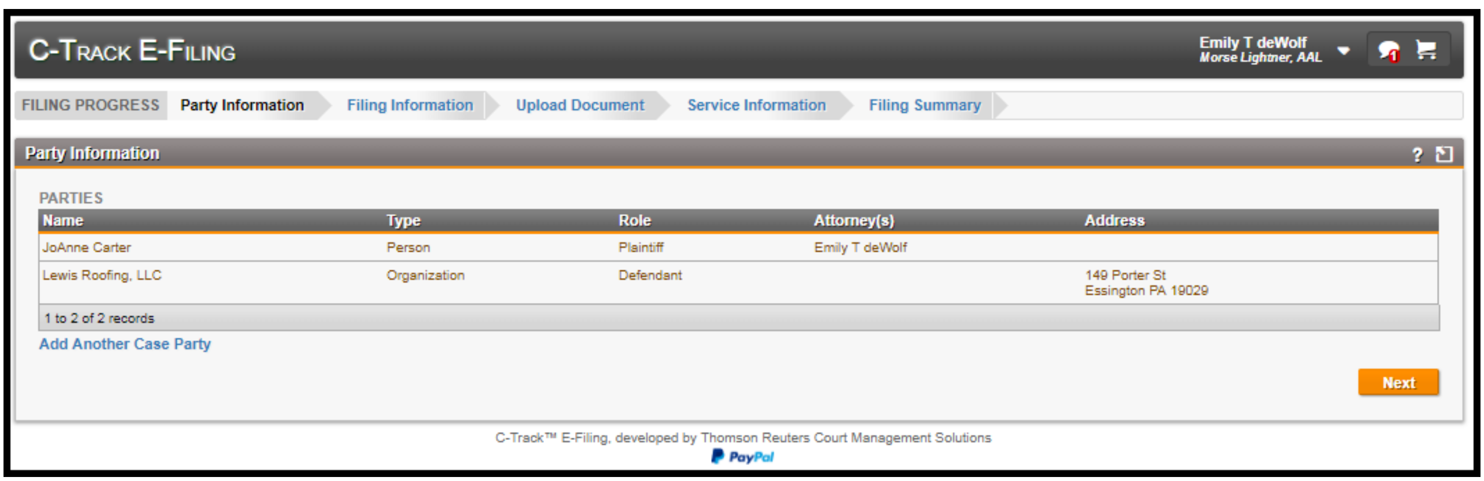


Fig. 1.72: Filing Progress screen – Party added

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.

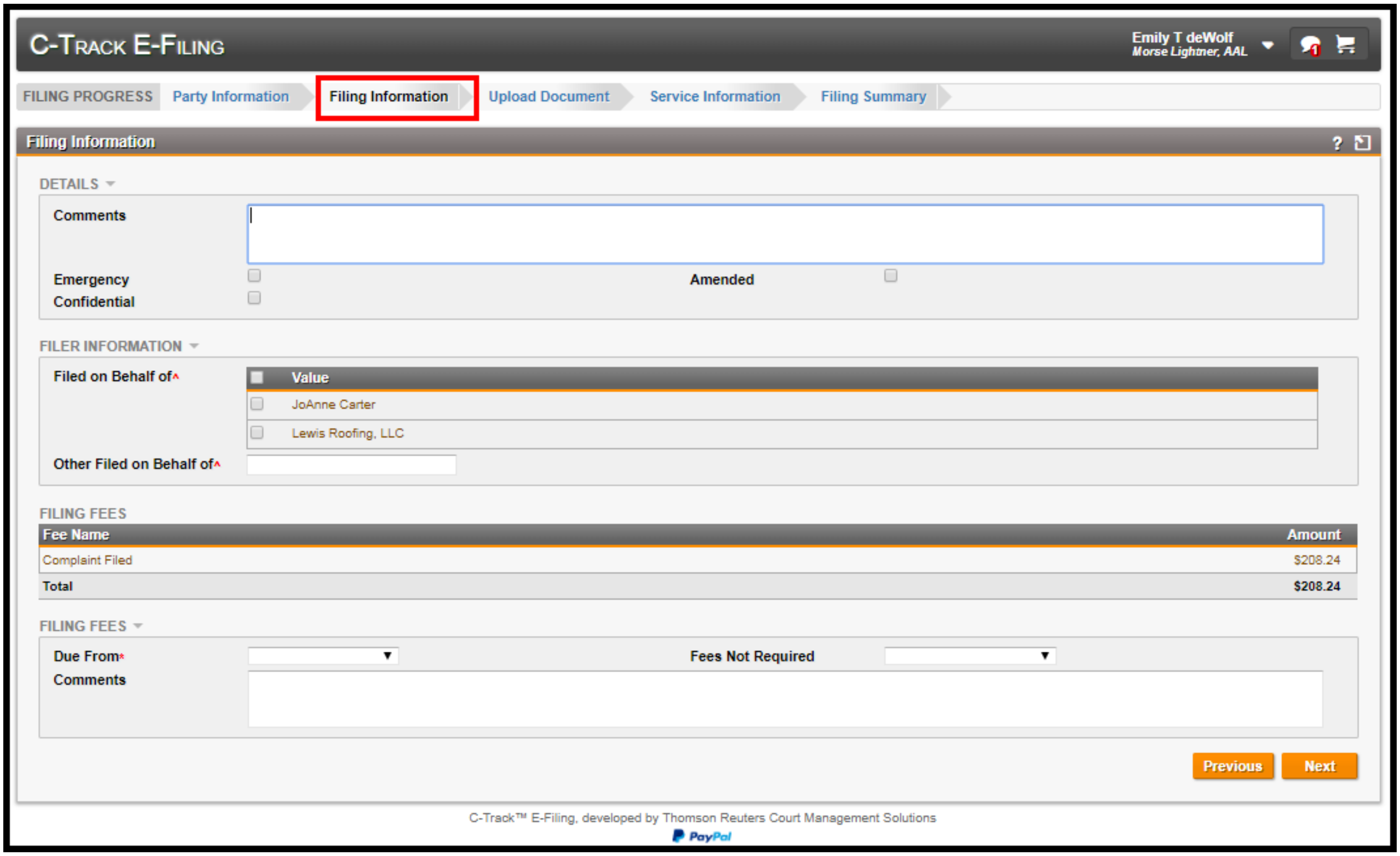


Fig. 1.73: Filing Information screen

> **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 curent 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.

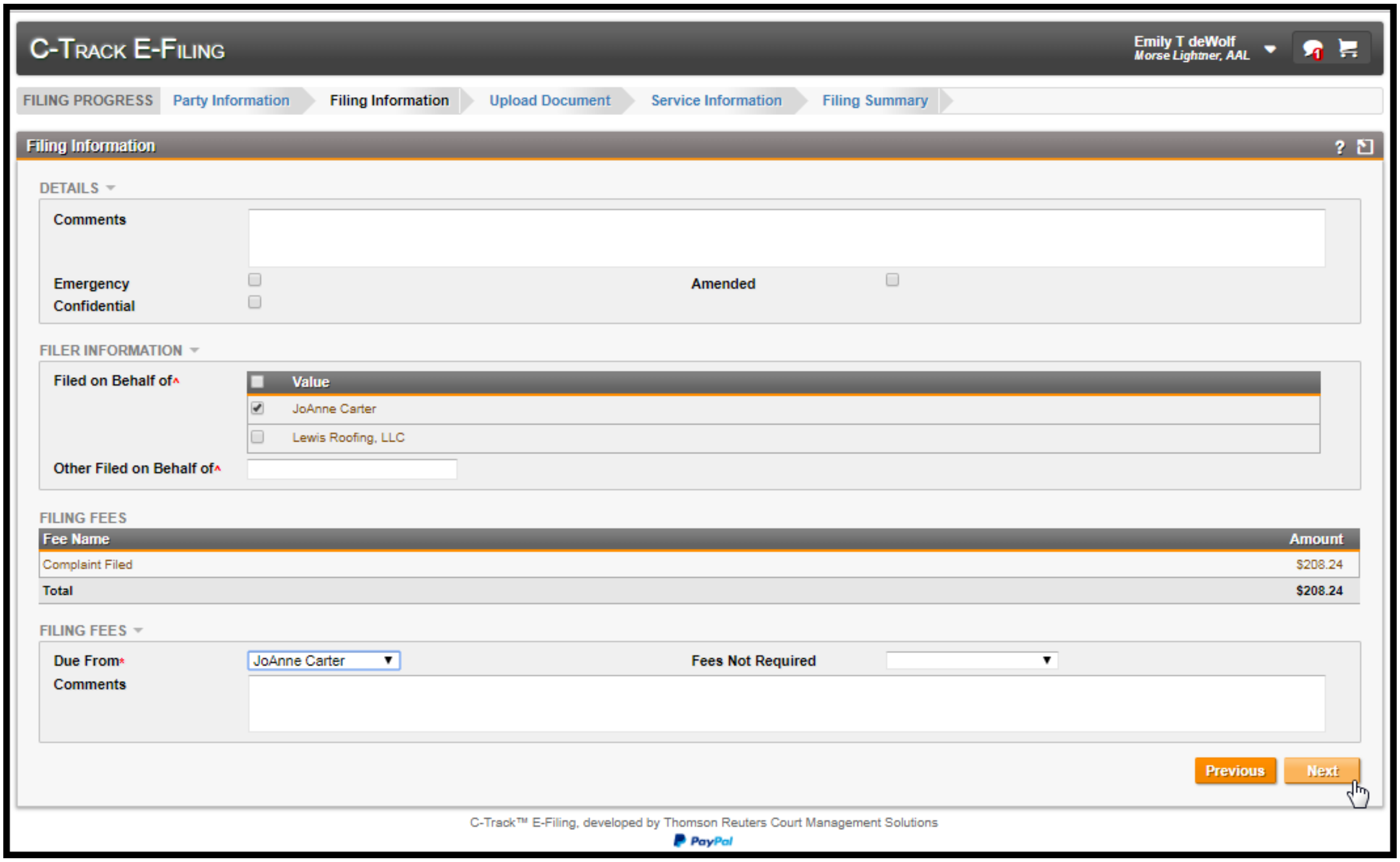


Fig. 1.75: Filing Information screen – selections complete

30. Click **Next**.

The **Upload Document** screen appears.

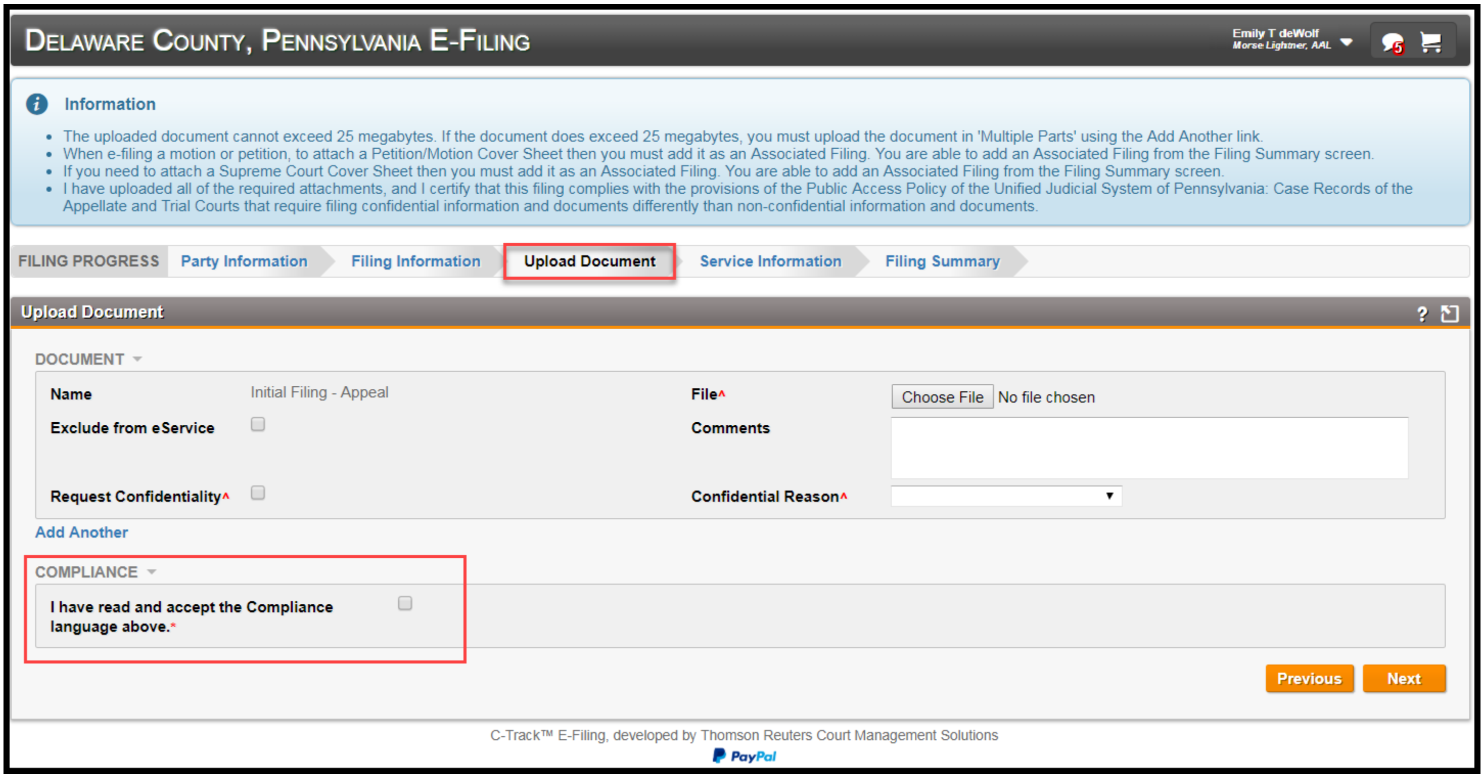


Fig. 1.76: Upload Document screen

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.

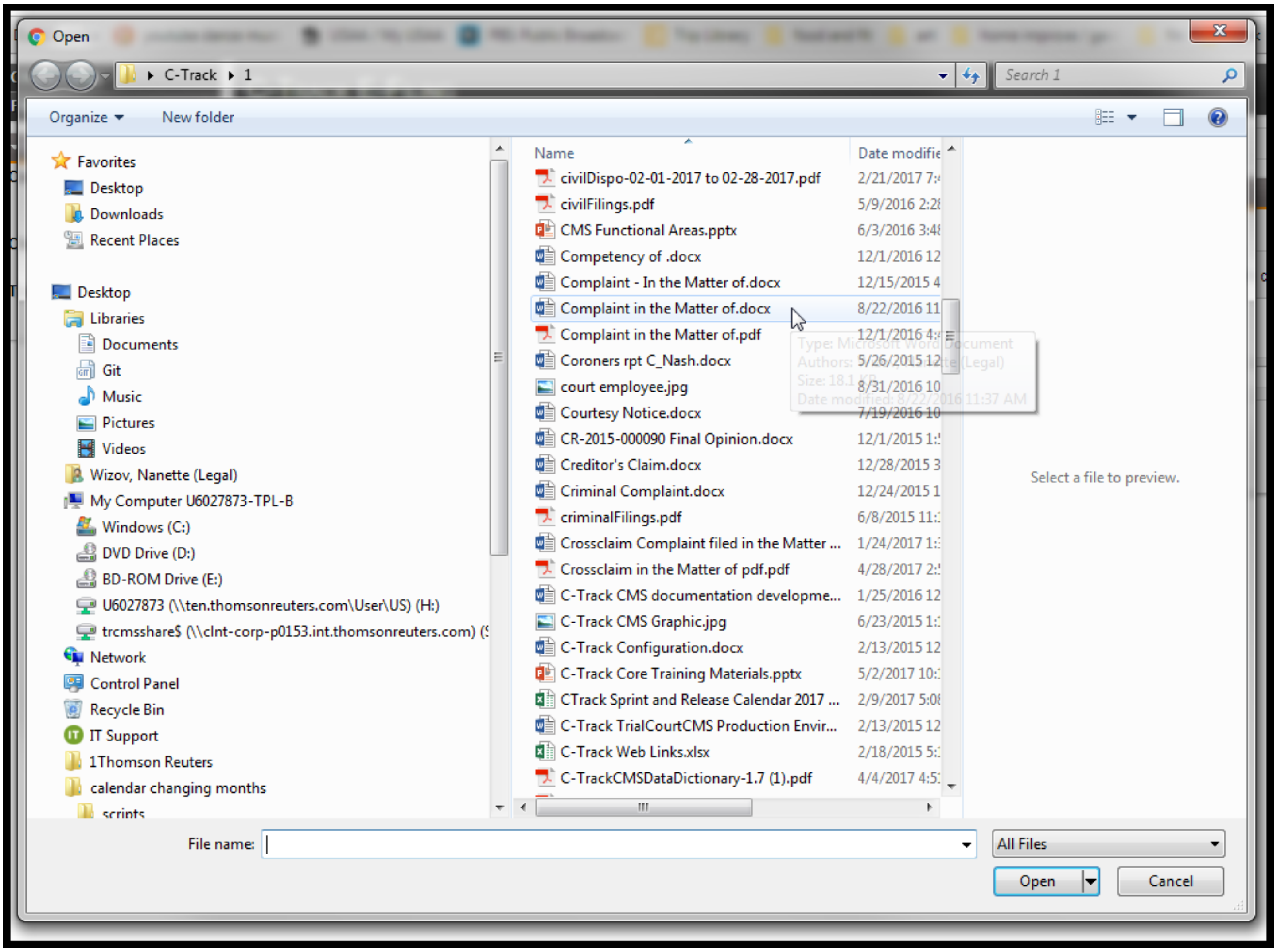


Fig. 1.77: Open browser window

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.

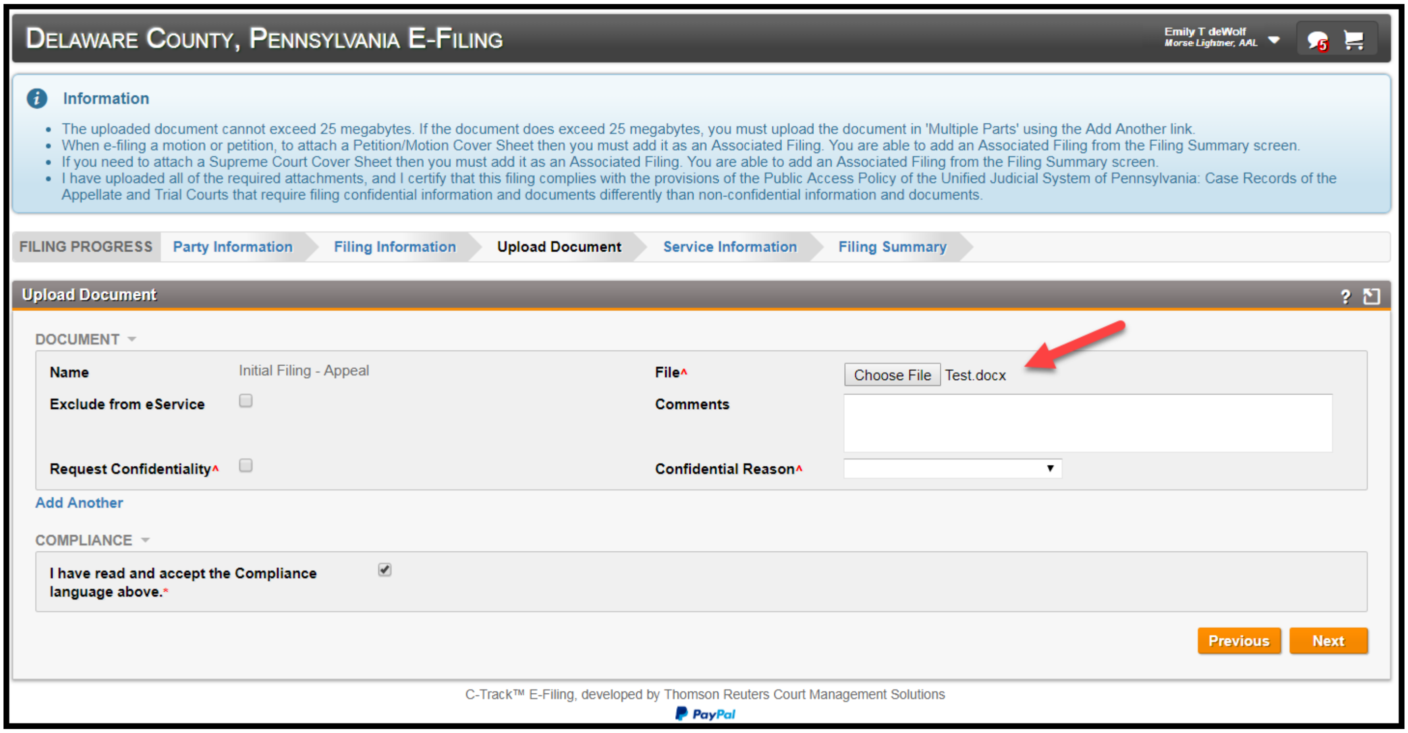


Fig. 1.78: Upload Document screen – file selected

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.

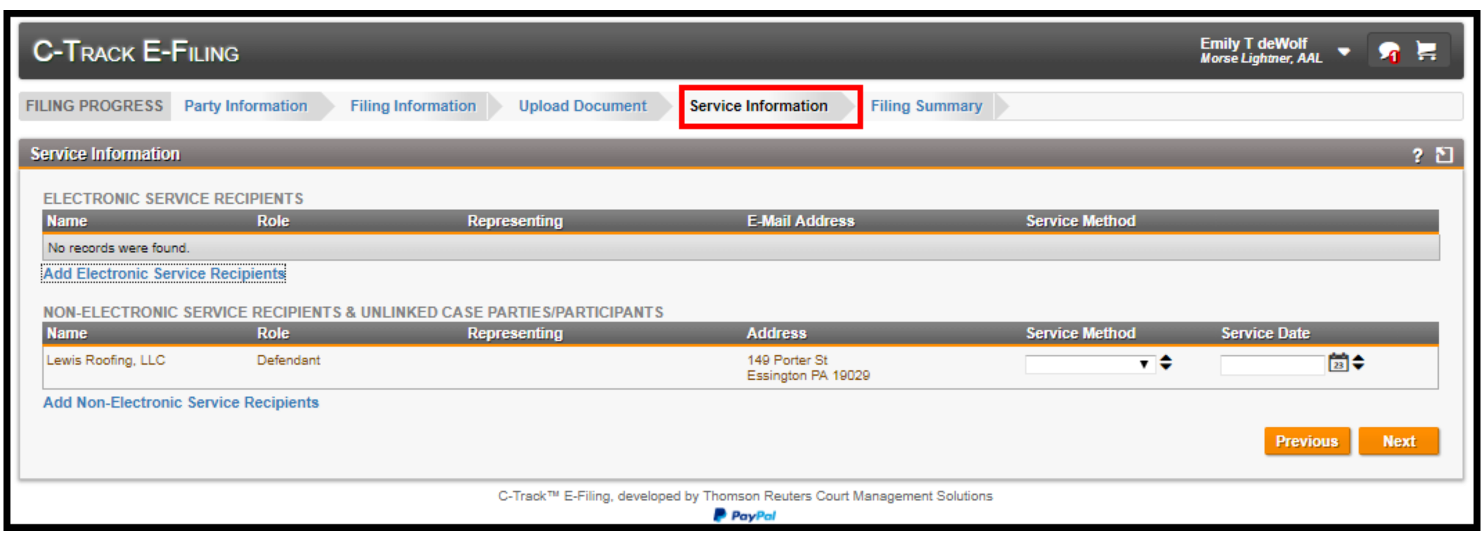


Fig. 1.79: Service Information screen

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**.

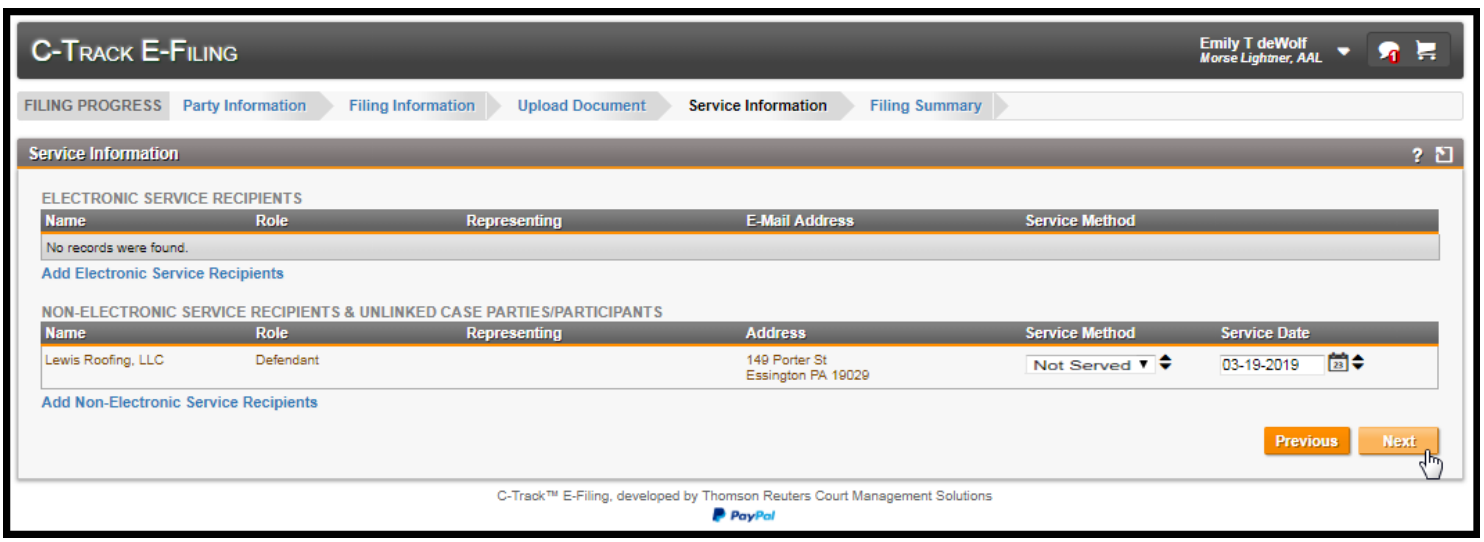


Fig. 1.80: Service Information screen - complete

37. Click **Next**.

The **Filing Summary** screen appears.

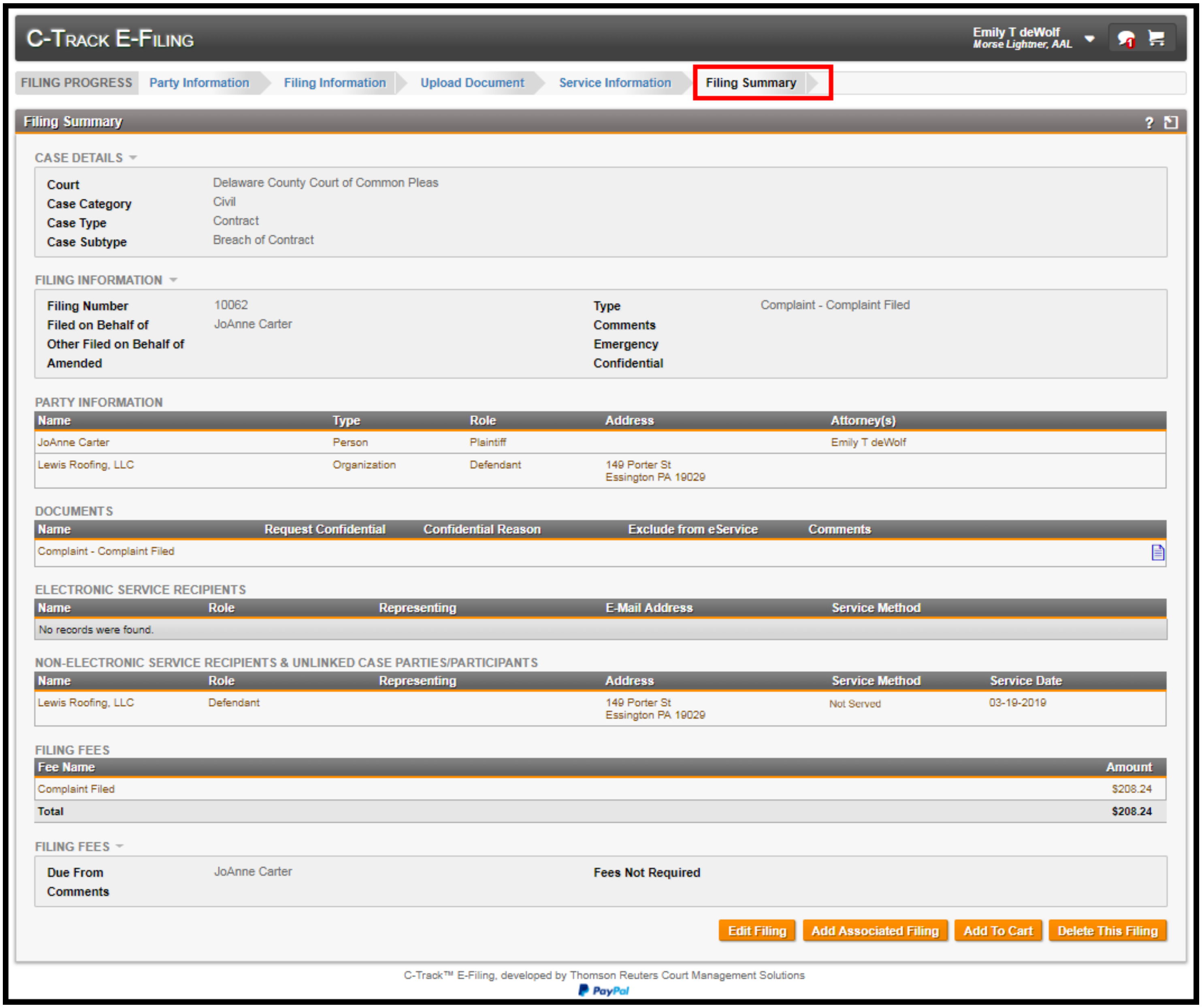


Fig. 1.81: Filing Summary screen

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.

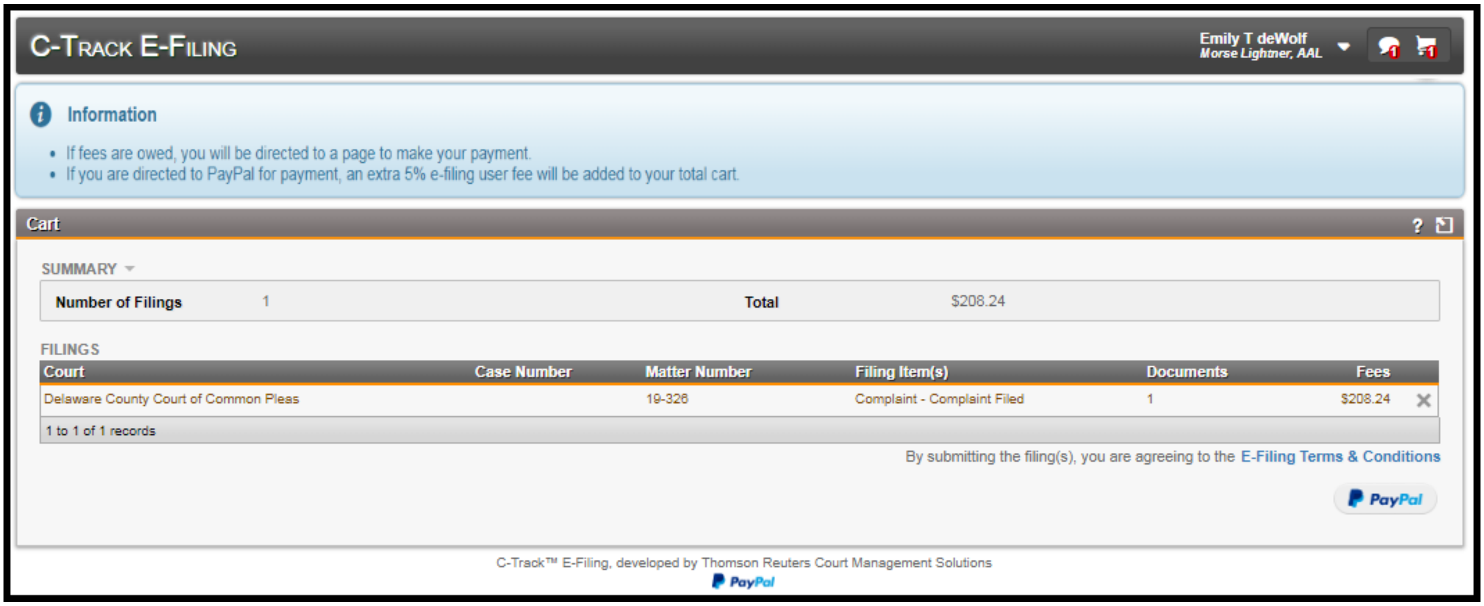


Fig. 1.82: Cart screen

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 process. **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 successful saved and process, the **Submission Confirmation** screen appears.

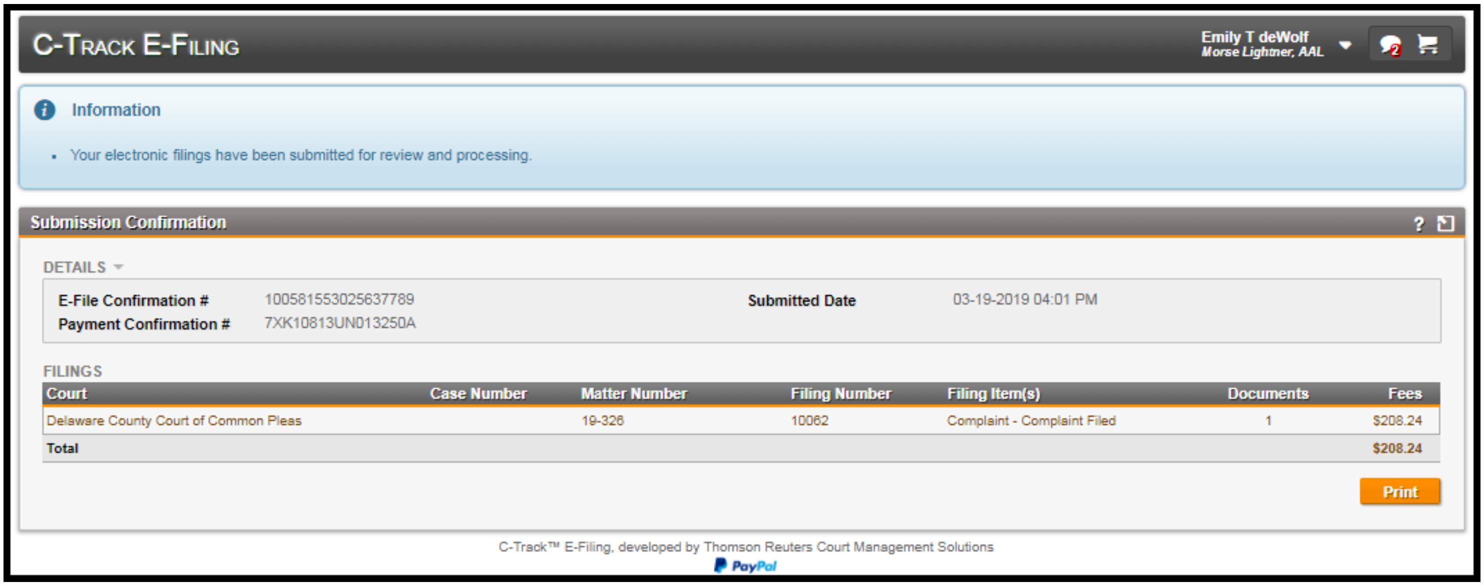


Fig. 1.83: Submission Confirmation screen

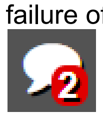
You have successfully submitted as electronic filing for a new case in the C-Track E-Filing application.

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.

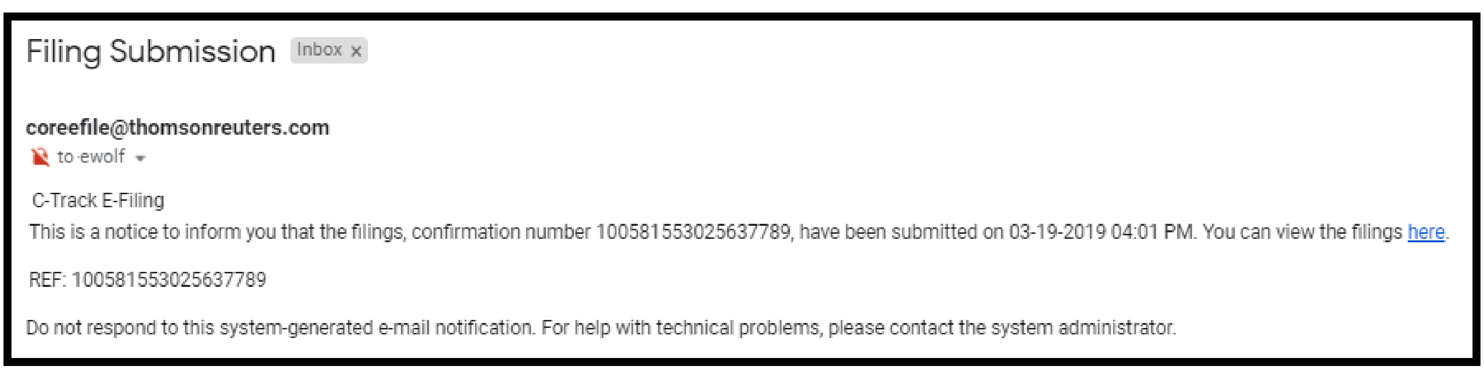


Fig. 1.84: Email Confirmation

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.

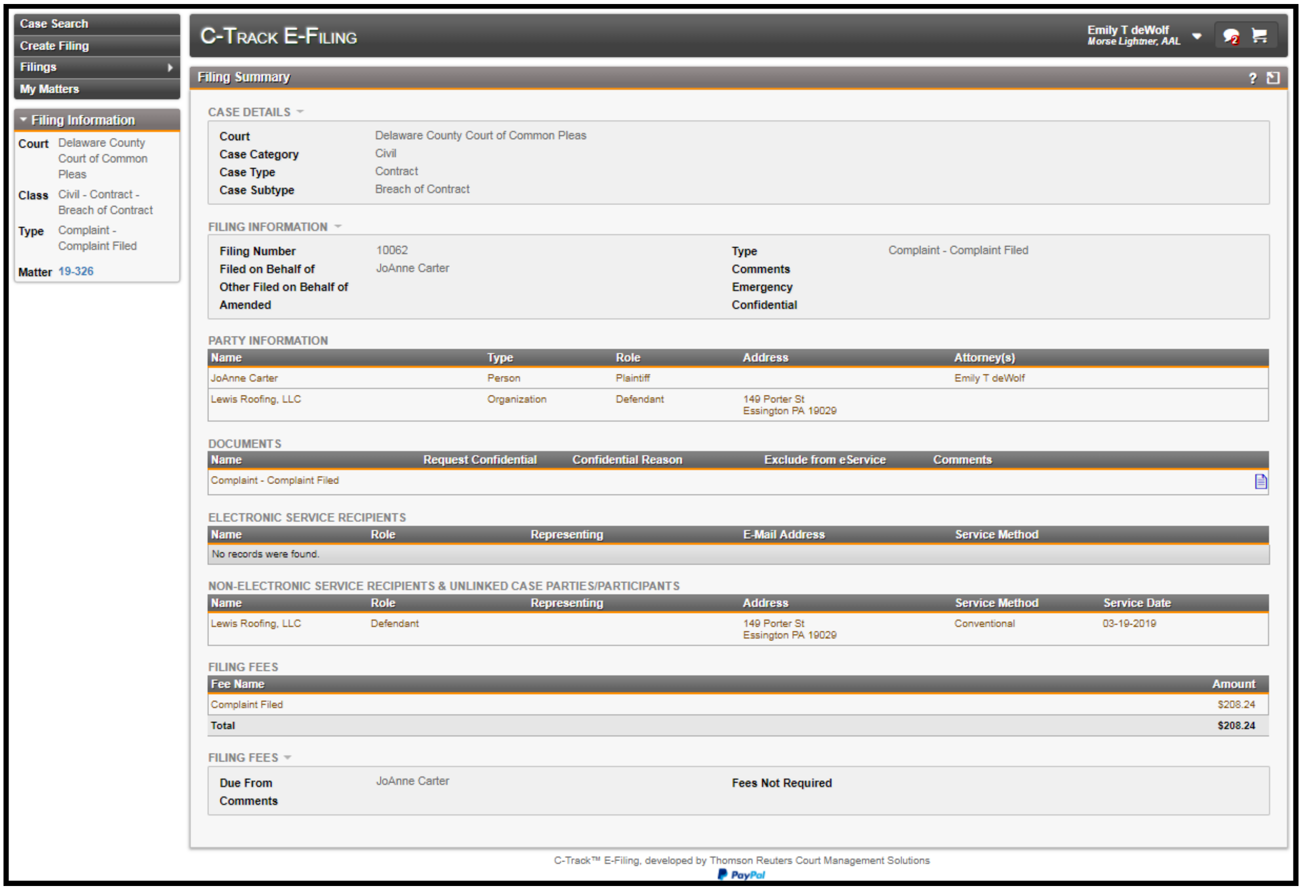


Fig. 1.85: Filing Summary screen

Additionally, any party that was served electronically with a successfully processed filling 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.

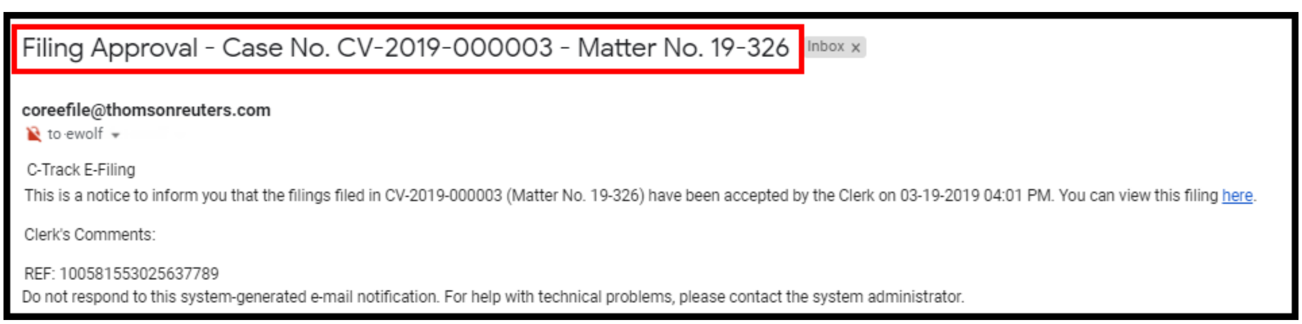


Fig. 1.86: Email Approval to E-Filer

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.

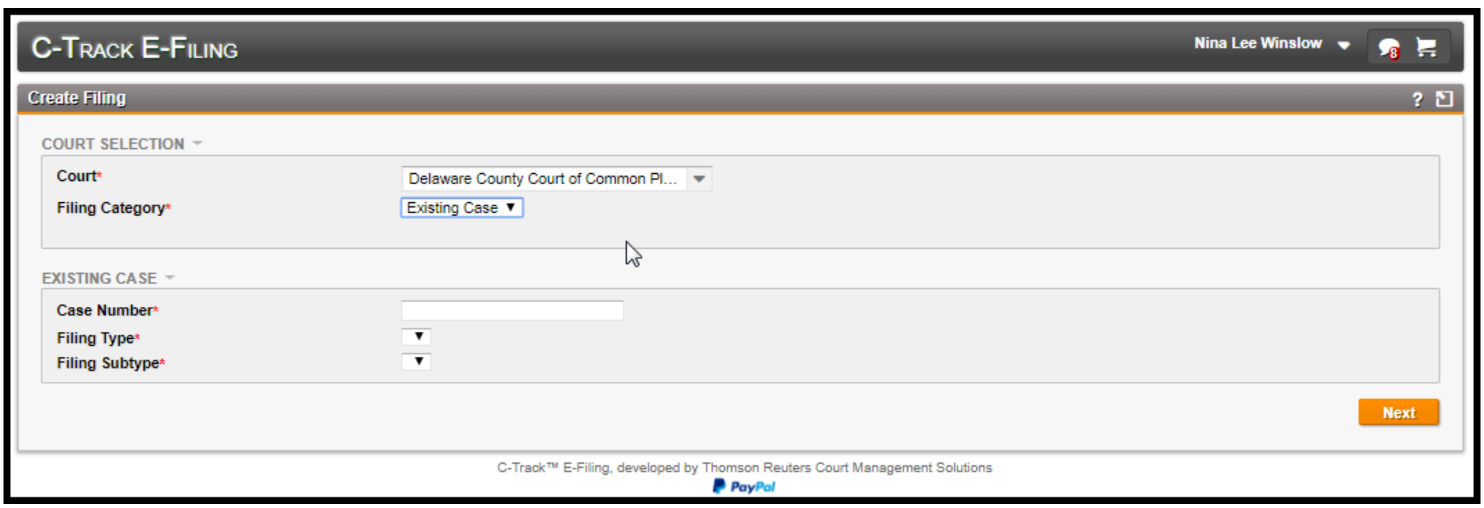


Fig. 1.88: Create Filing screen – **Existing Case** container is added

4. Enter **Case Number**.

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**.

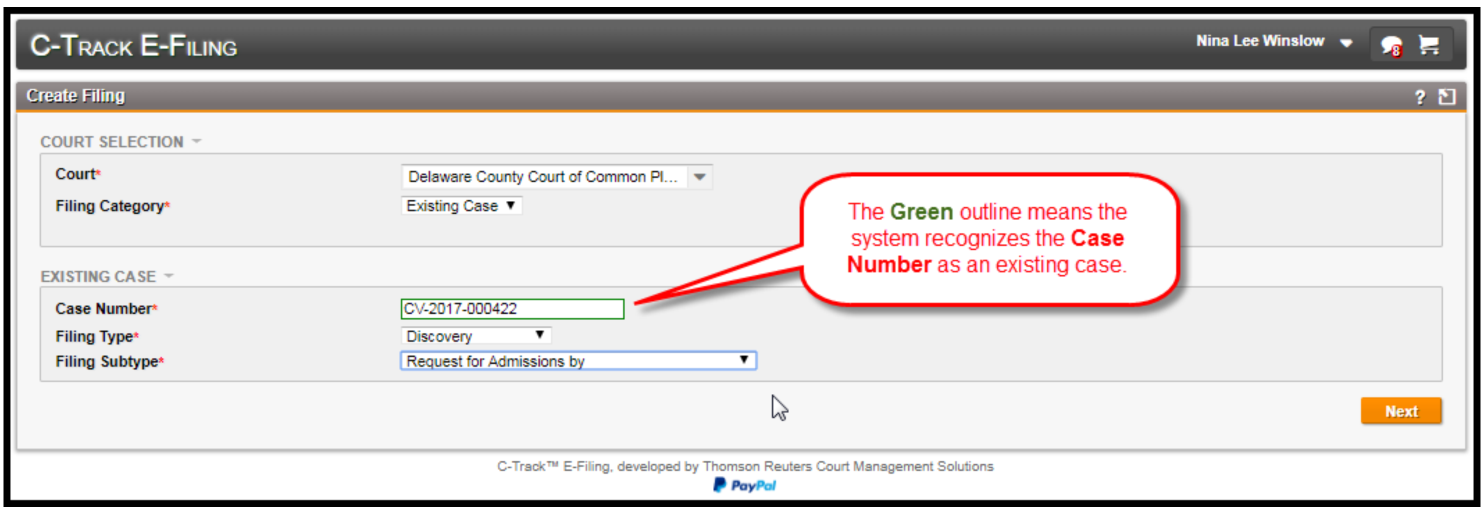


Fig. 1.90: Create Filing screen – **Existing Case**

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.

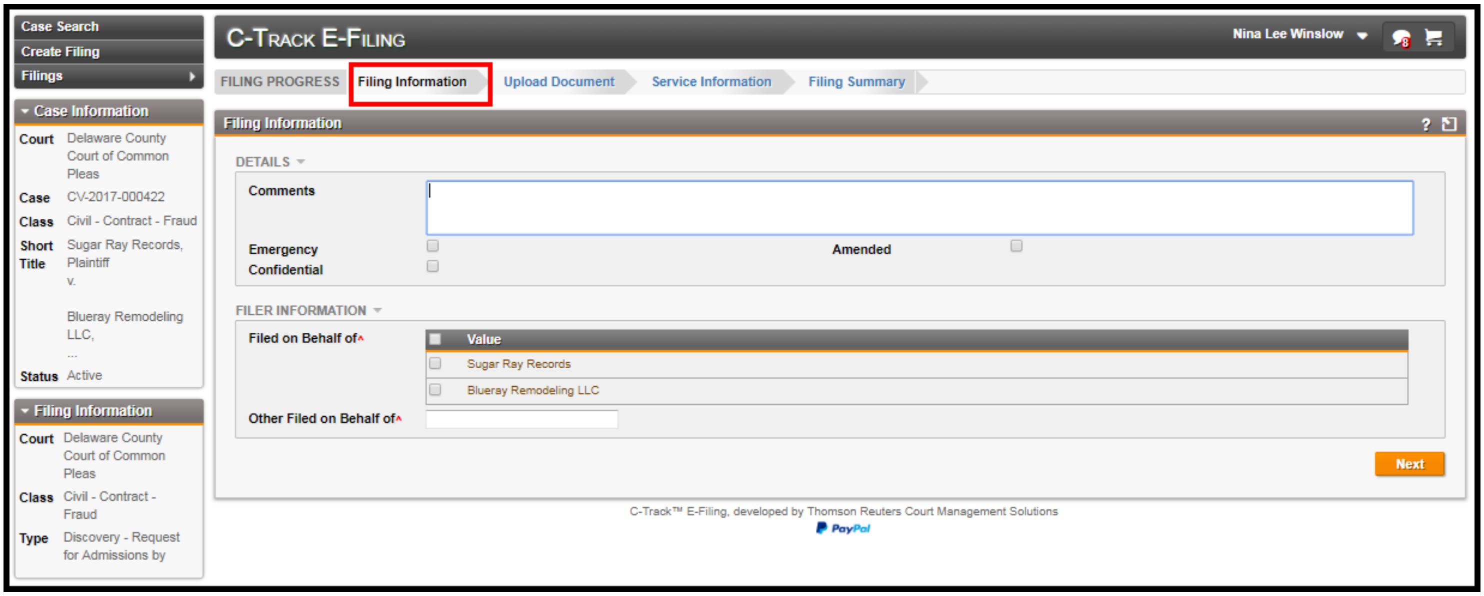


Fig. 1.91: Filing Information screen

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.

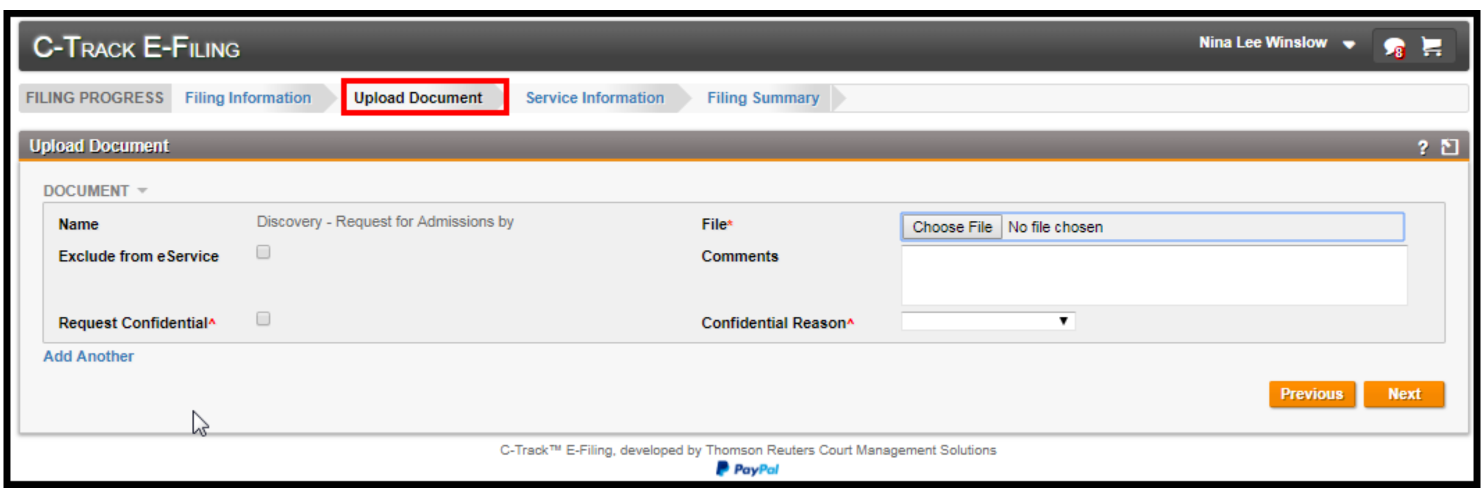


Fig. 1.92: Upload Document screen

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.

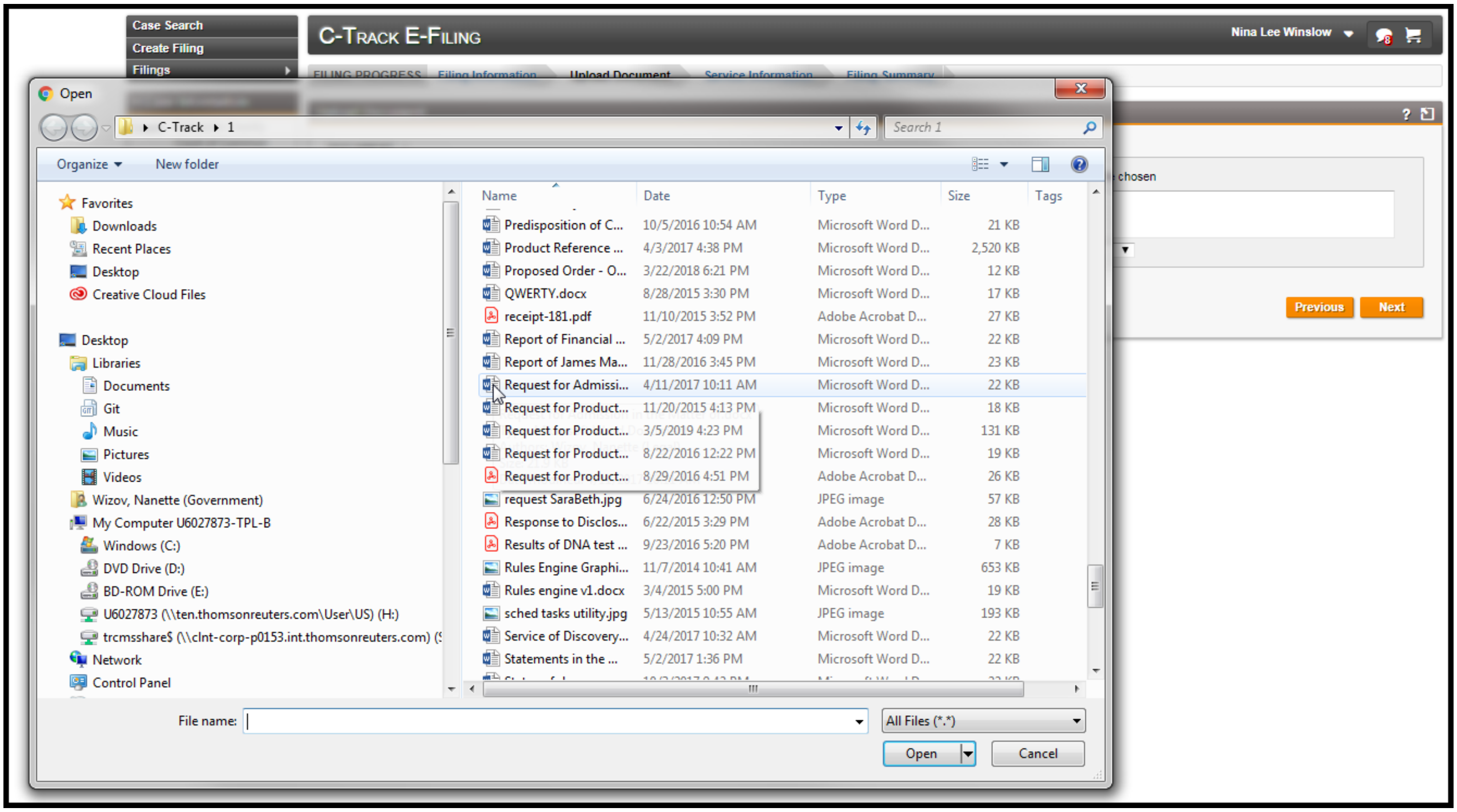


Fig. 1.93: Open browser window

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.

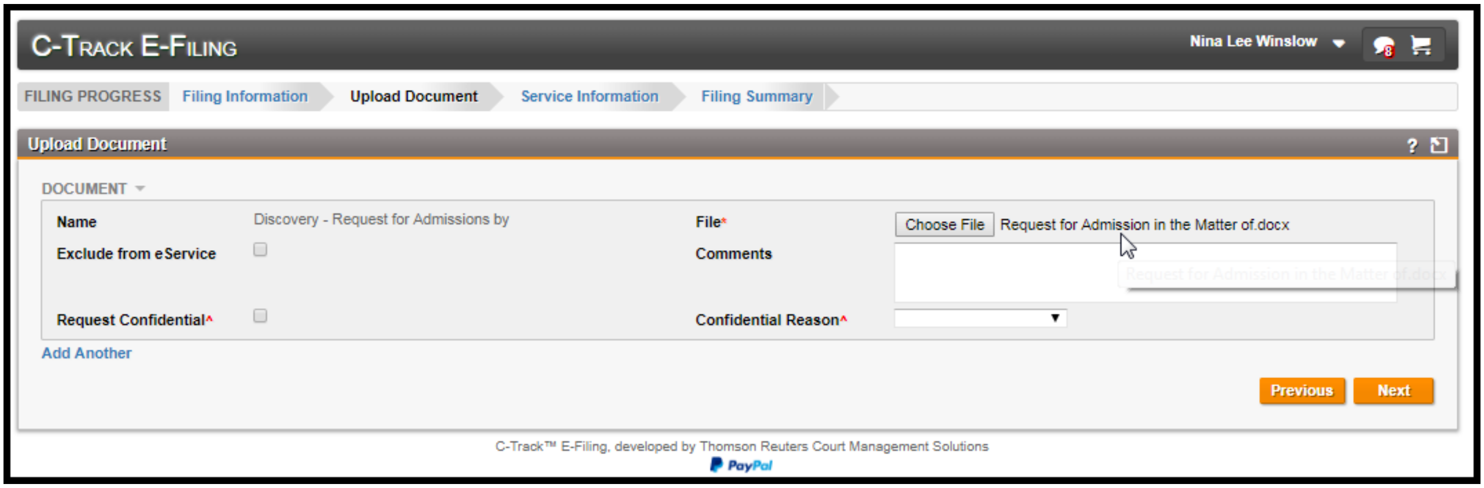


Fig. 1.94: Upload Document screen – file selected

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.

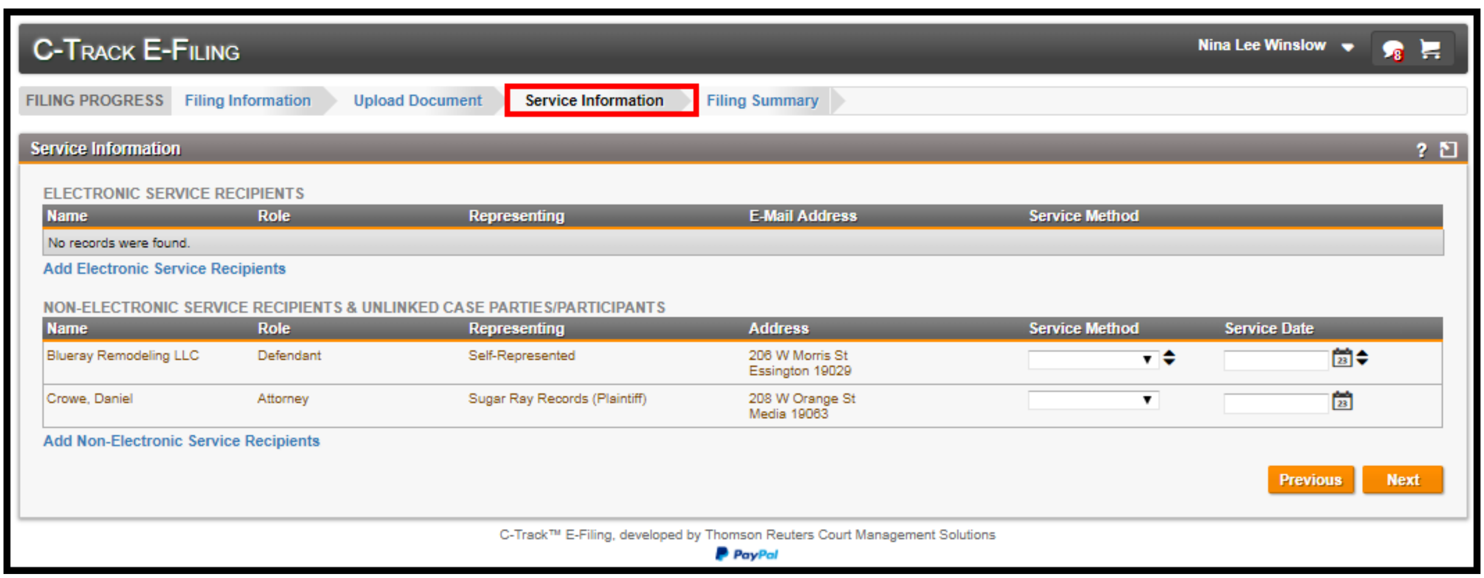


Fig. 1.95: Service Information screen

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

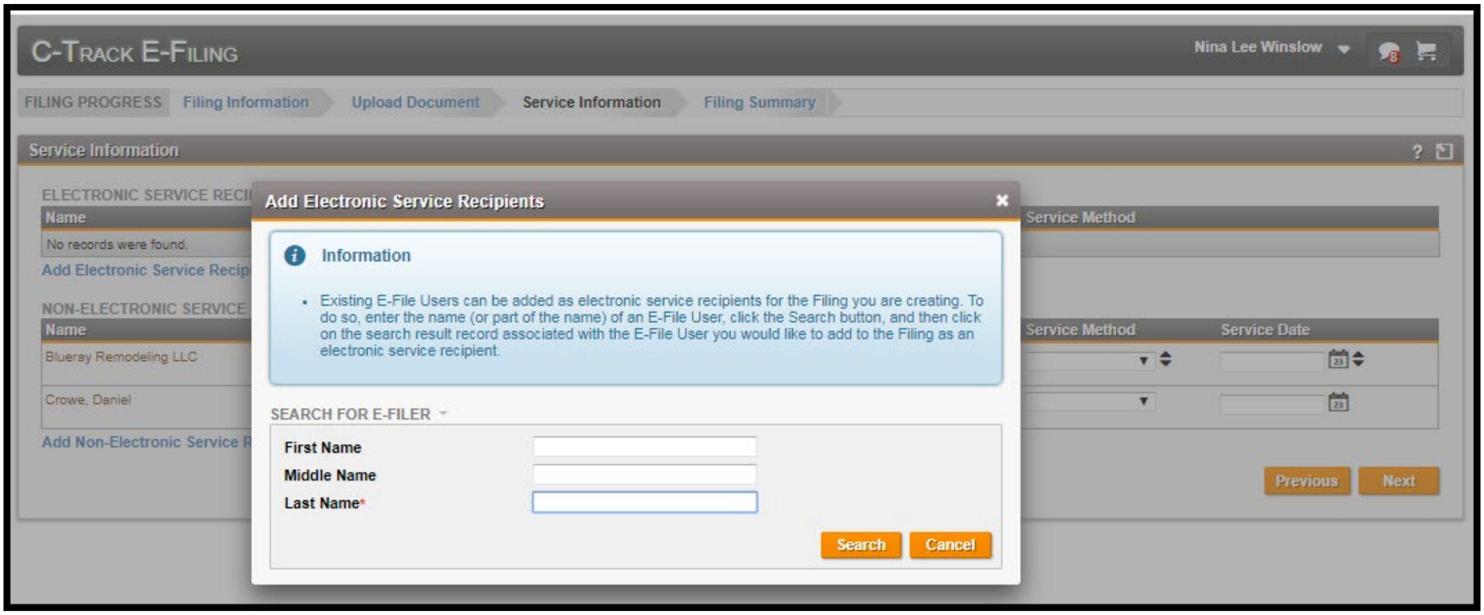


Fig. 1.96: Add Electronic Service Recipients window

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**.

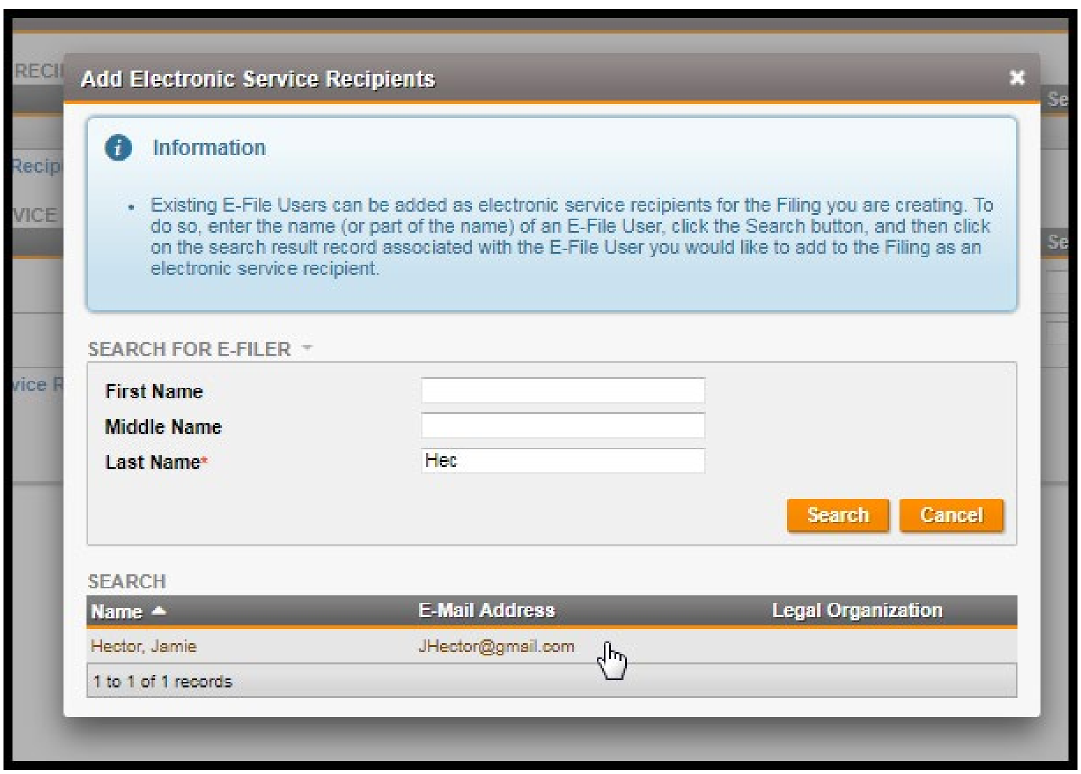


Fig. 1.97: Add Electronic Service Recipients window – Search result appears

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.

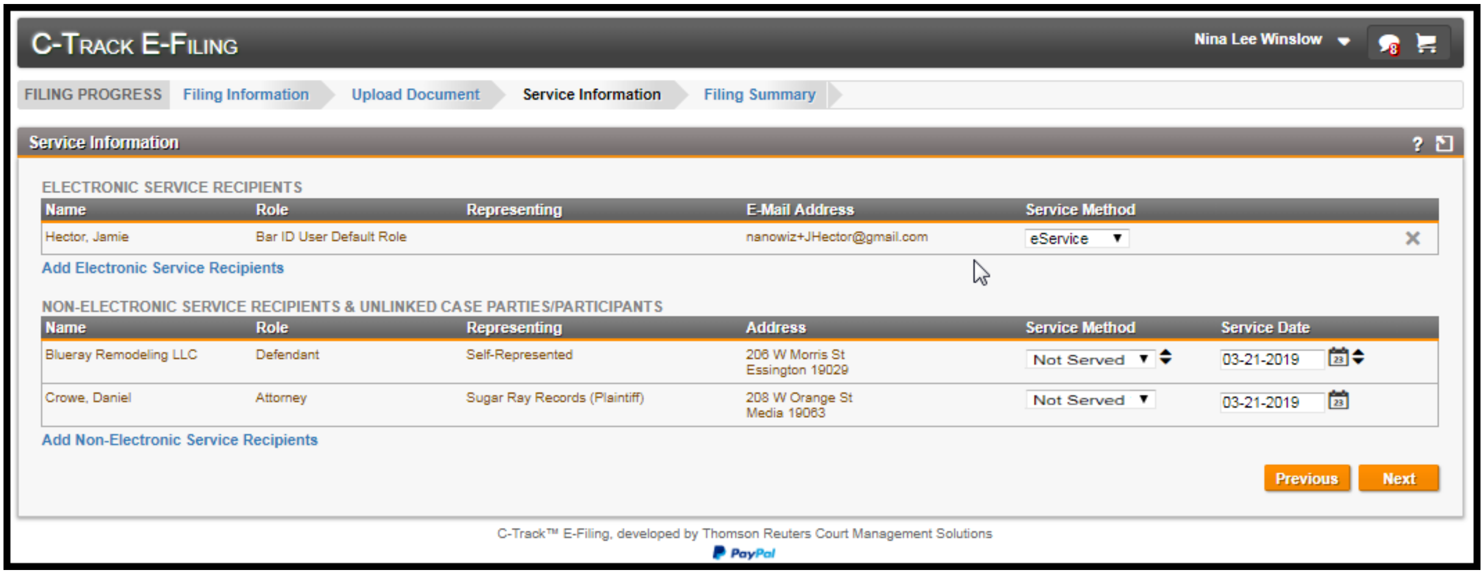


Fig. 1.98: Service Information screen – input complete

22. Click **Next**.

The **Filing Summary** screen appears.

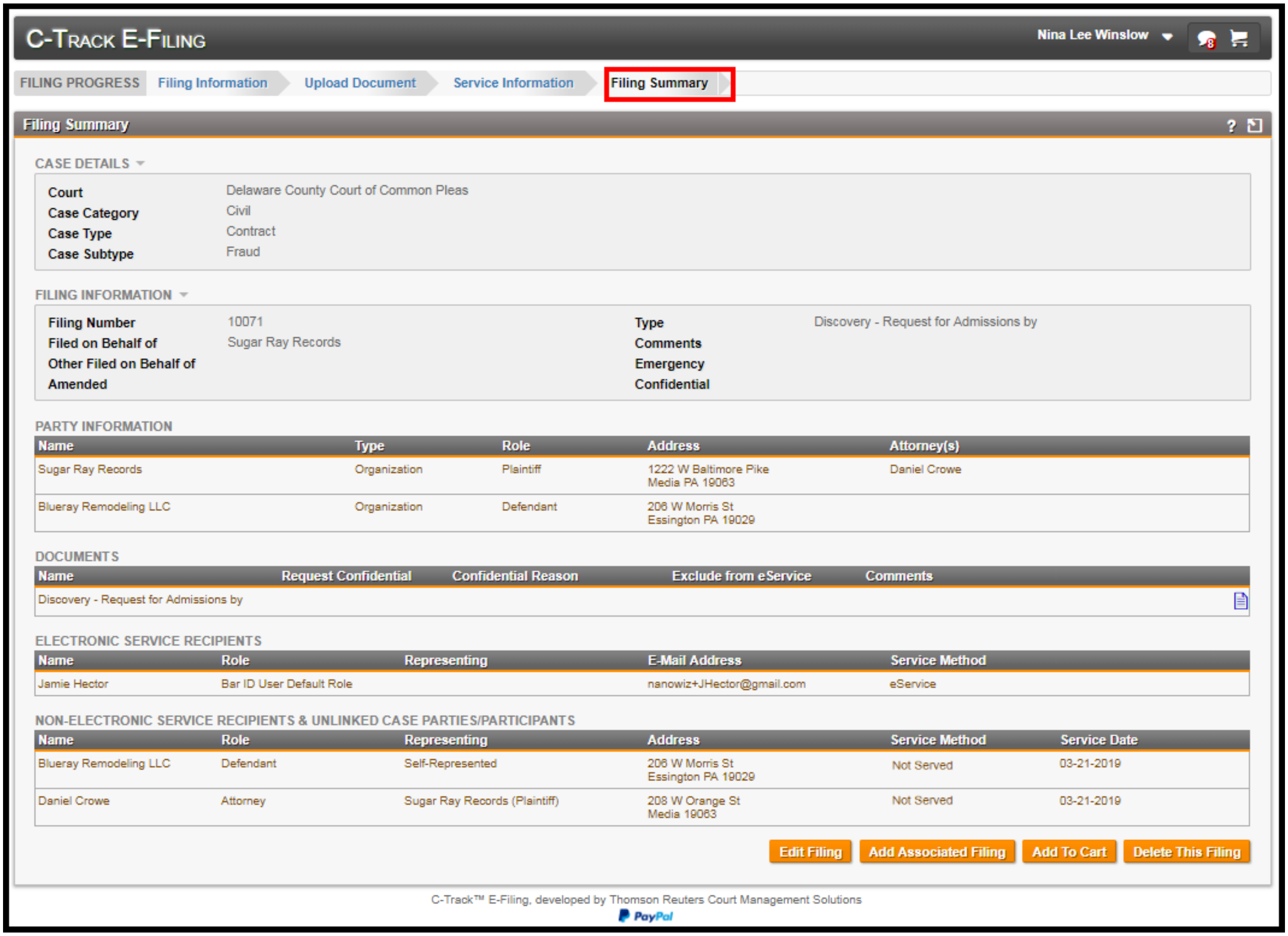


Fig. 1.99: Filing Summary screen

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

23. Click **Add to Cart**.

The **Cart** screen appears.

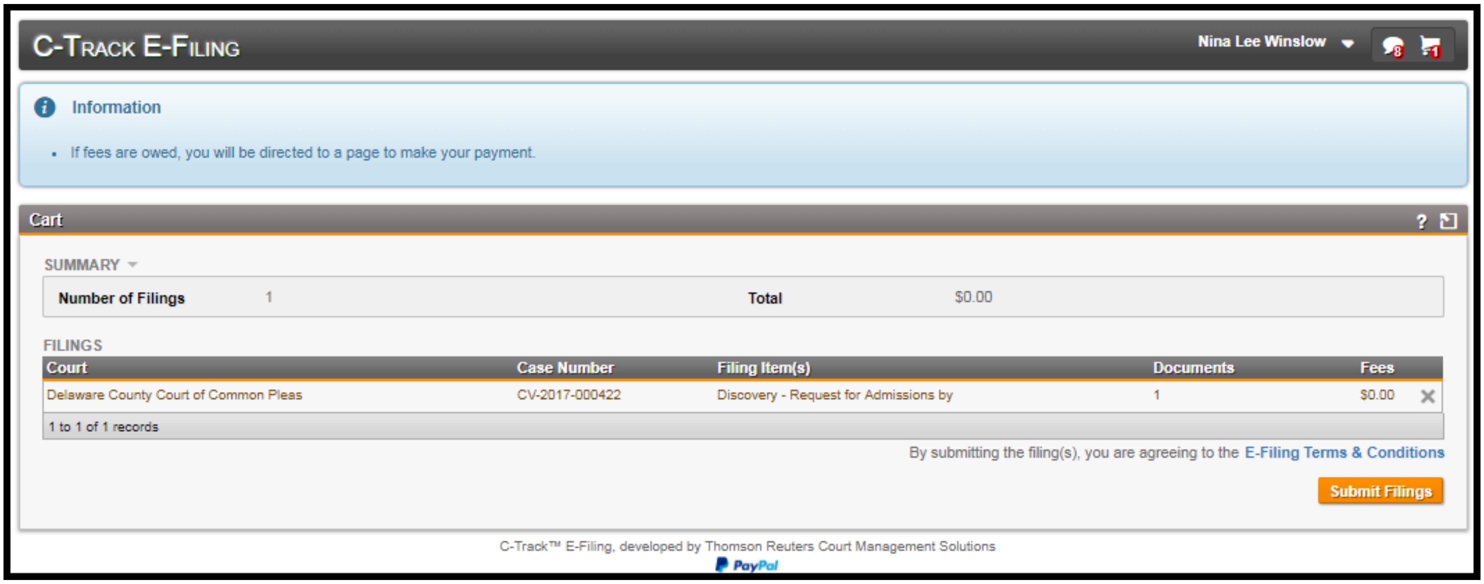


Fig. 1.100: Cart screen

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.

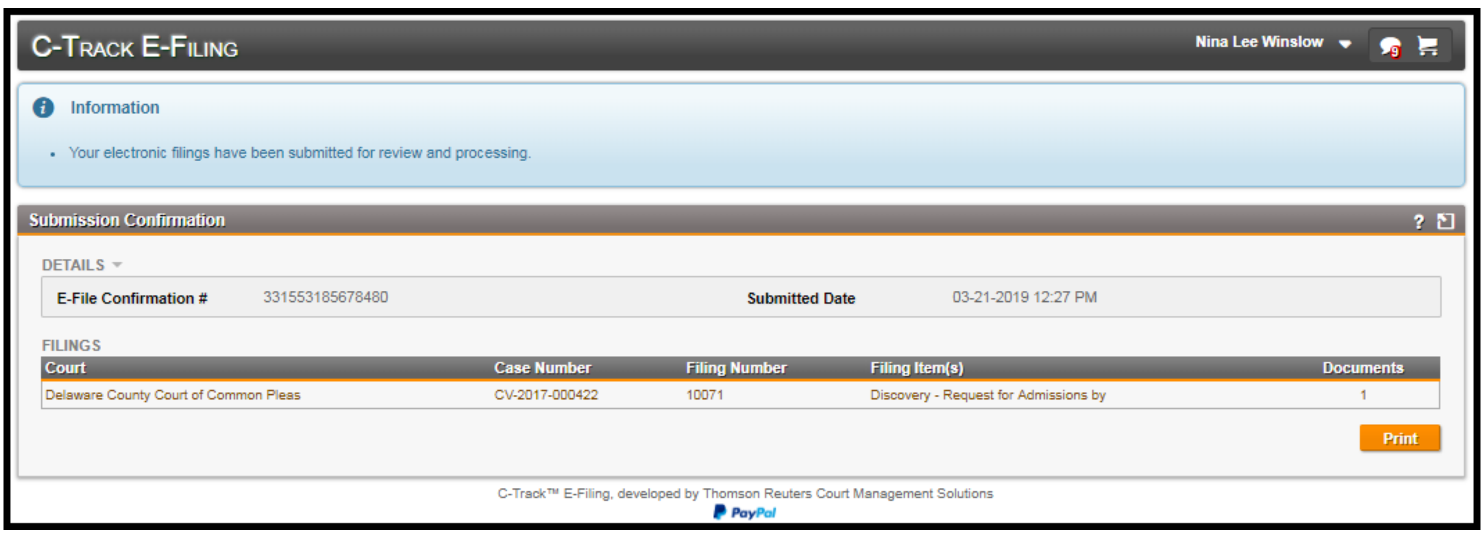


Fig. 1.101: Submission Confirmation screen

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 filling 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.

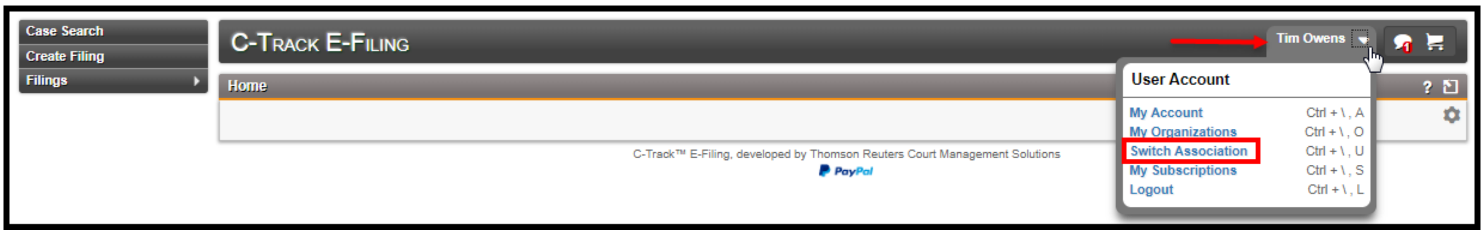


Fig. 1.102: User Account options exposed

> ➢ **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.

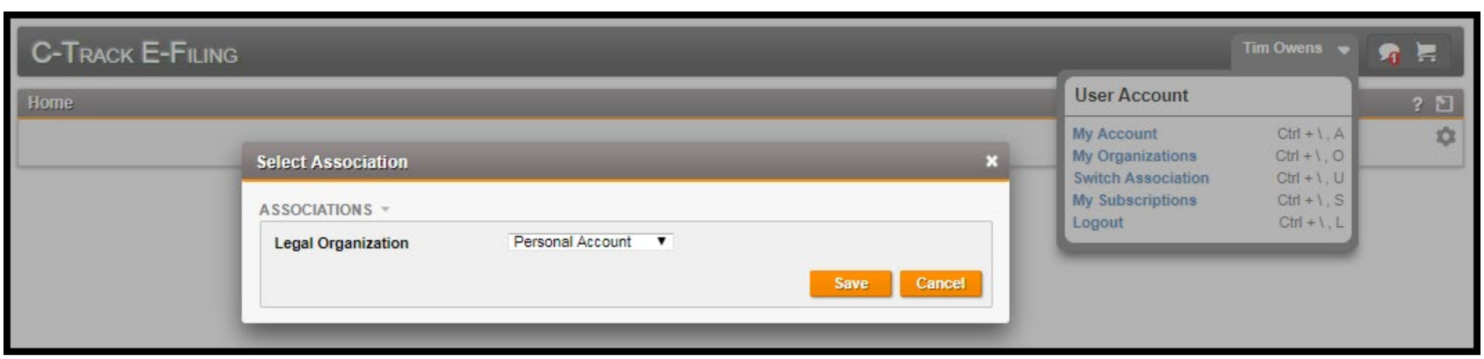


Fig. 1.103: Select Authorizing E-File User window

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

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

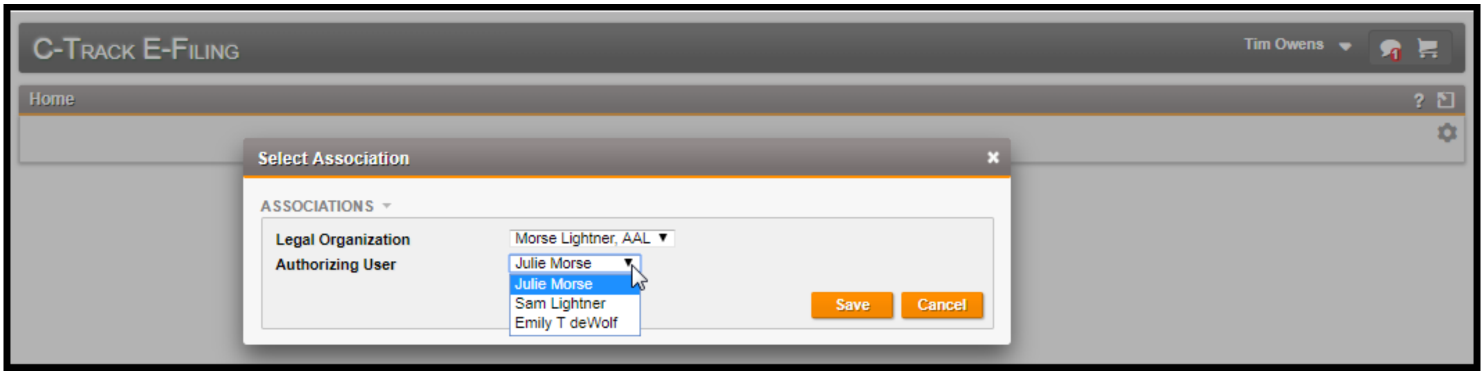


Fig. 1.104: Select Association window - **Authorizing User** drop down

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.

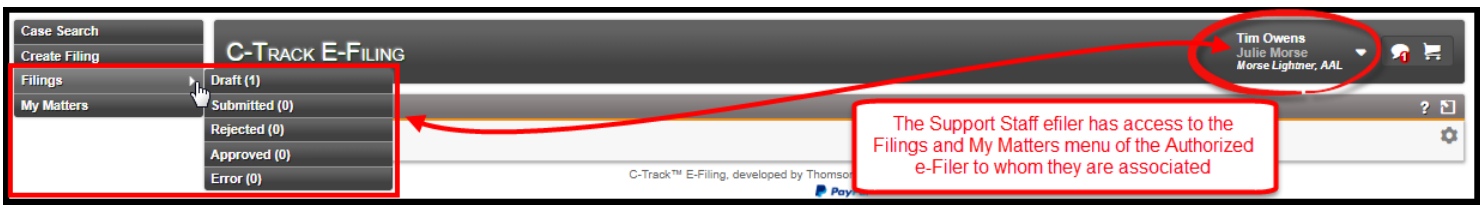


Fig. 1.105: Home screen with **Authorizing E-Filer** functionality

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.

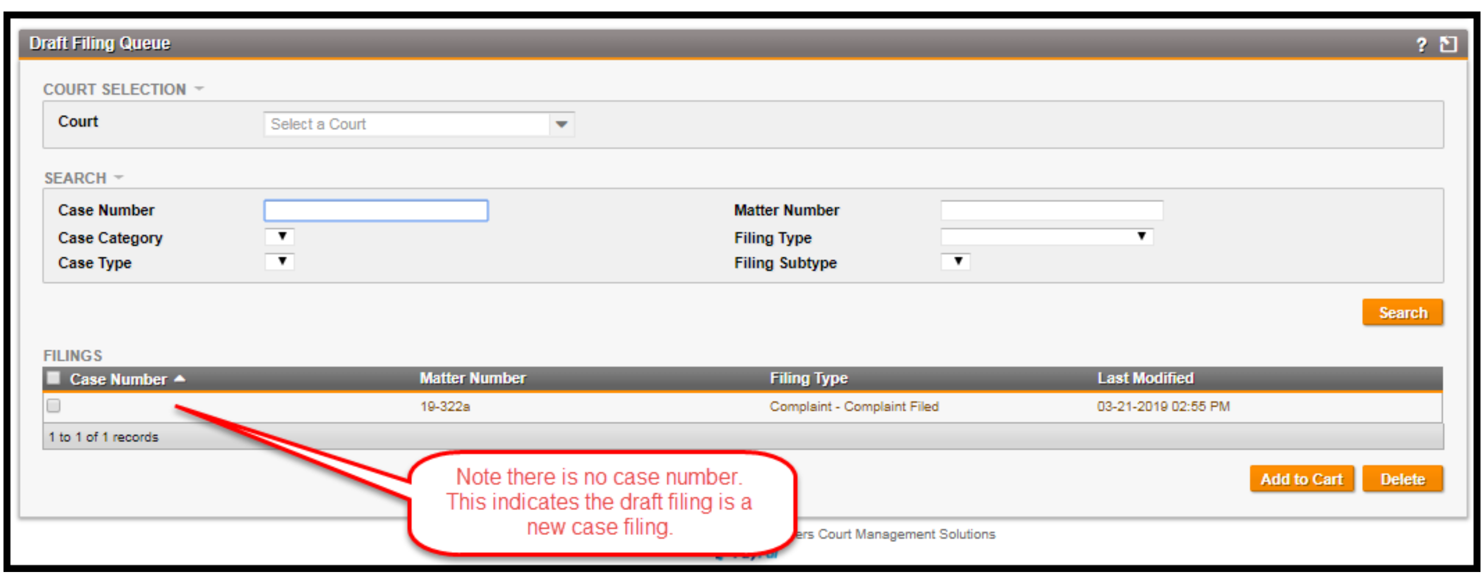


Fig. 1.106: Draft Filing Queue screen

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.

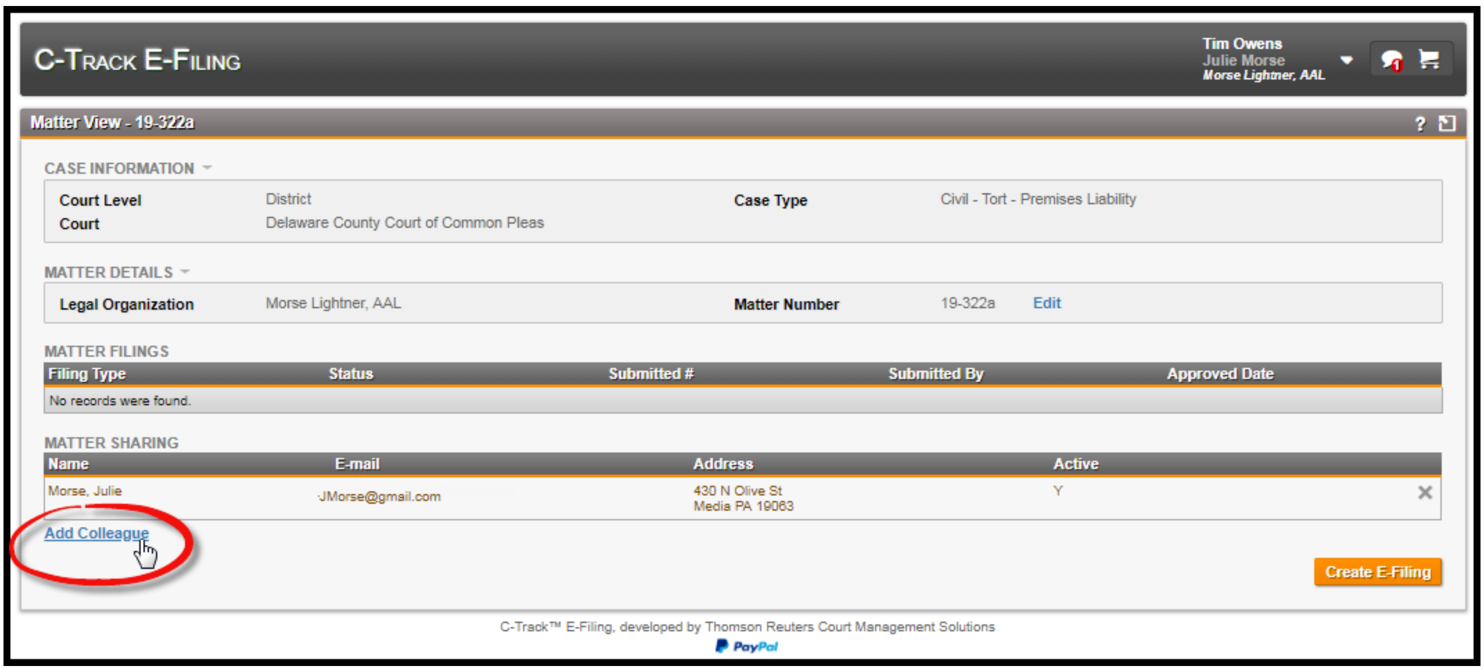


Fig. 1.107: Matter View screen

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.

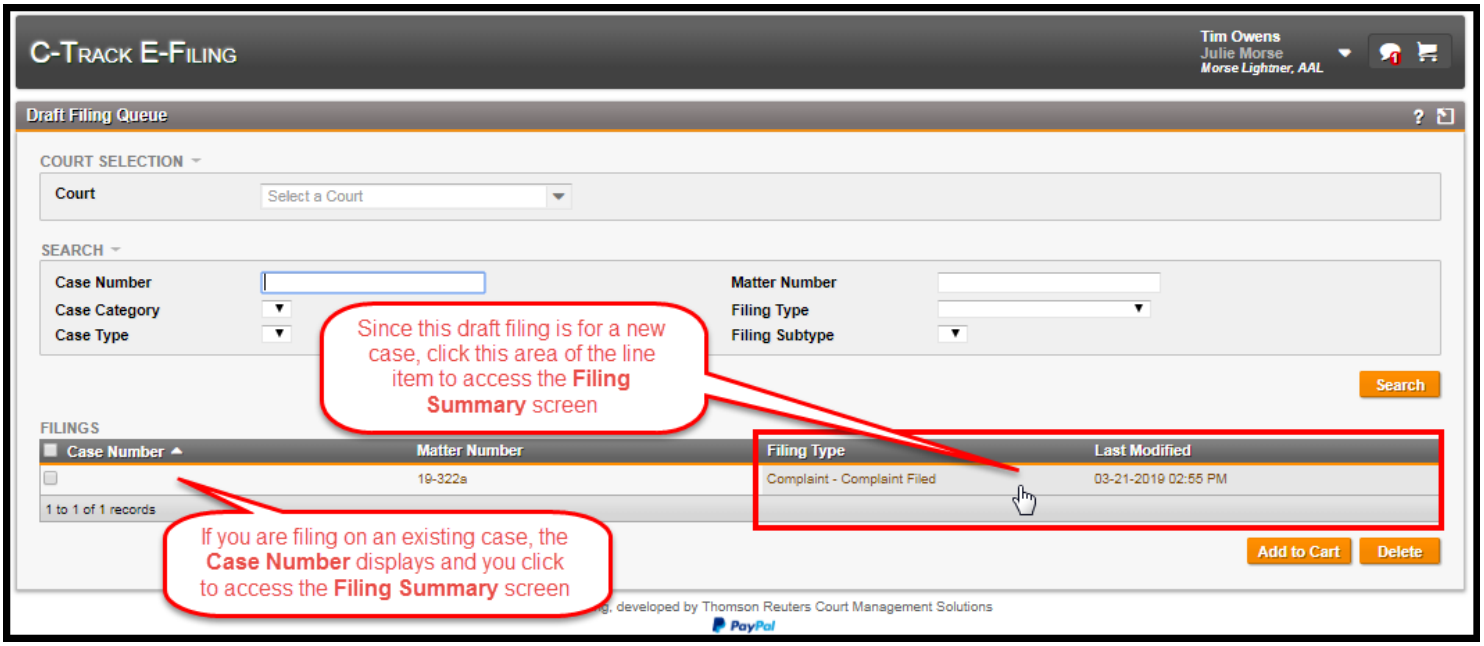


Fig. 1.108: Draft Filing Queue screen

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

The **Filing Summary** screen appears.

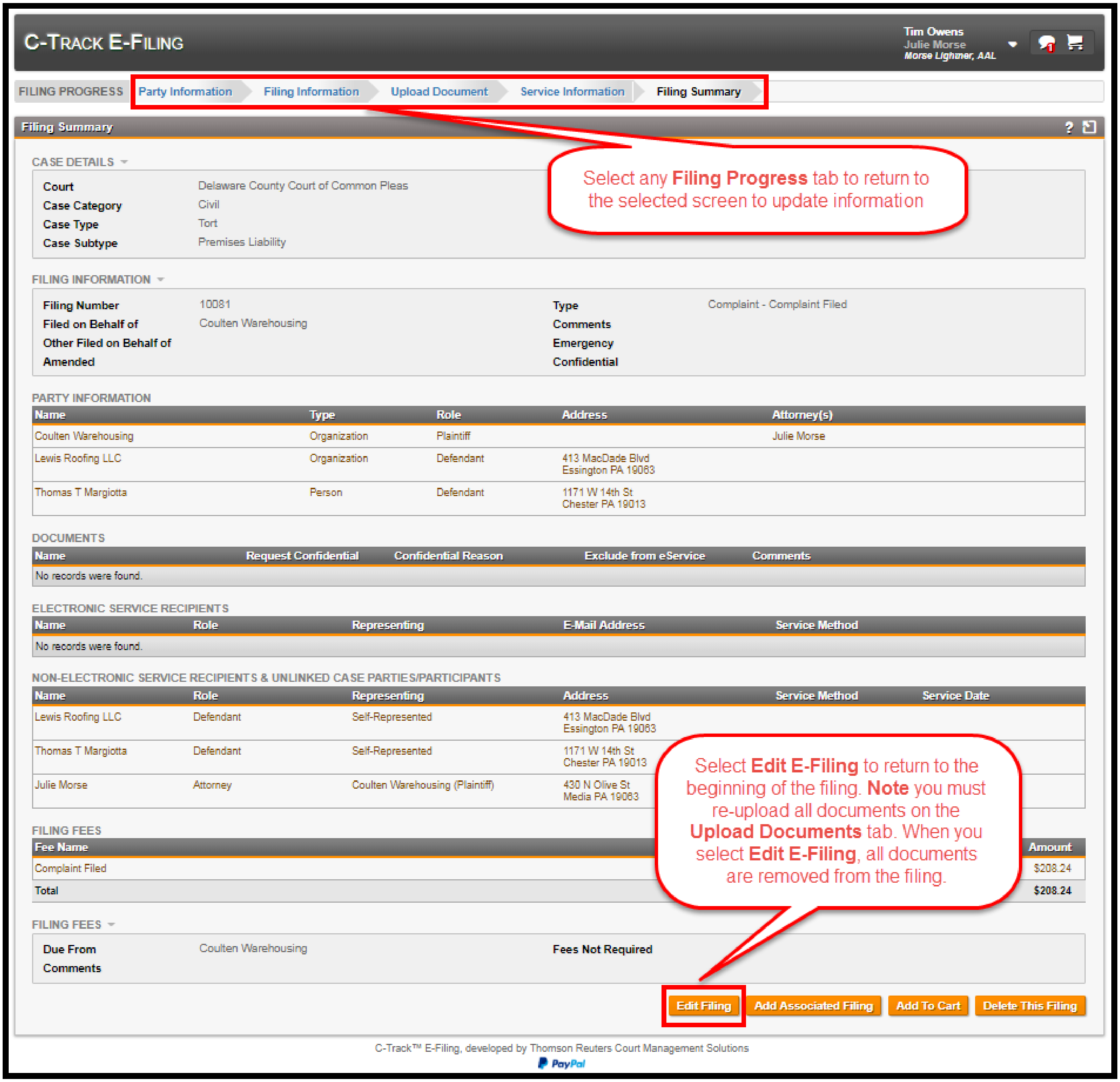


Fig. 1.109: Filing Summary screen

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.

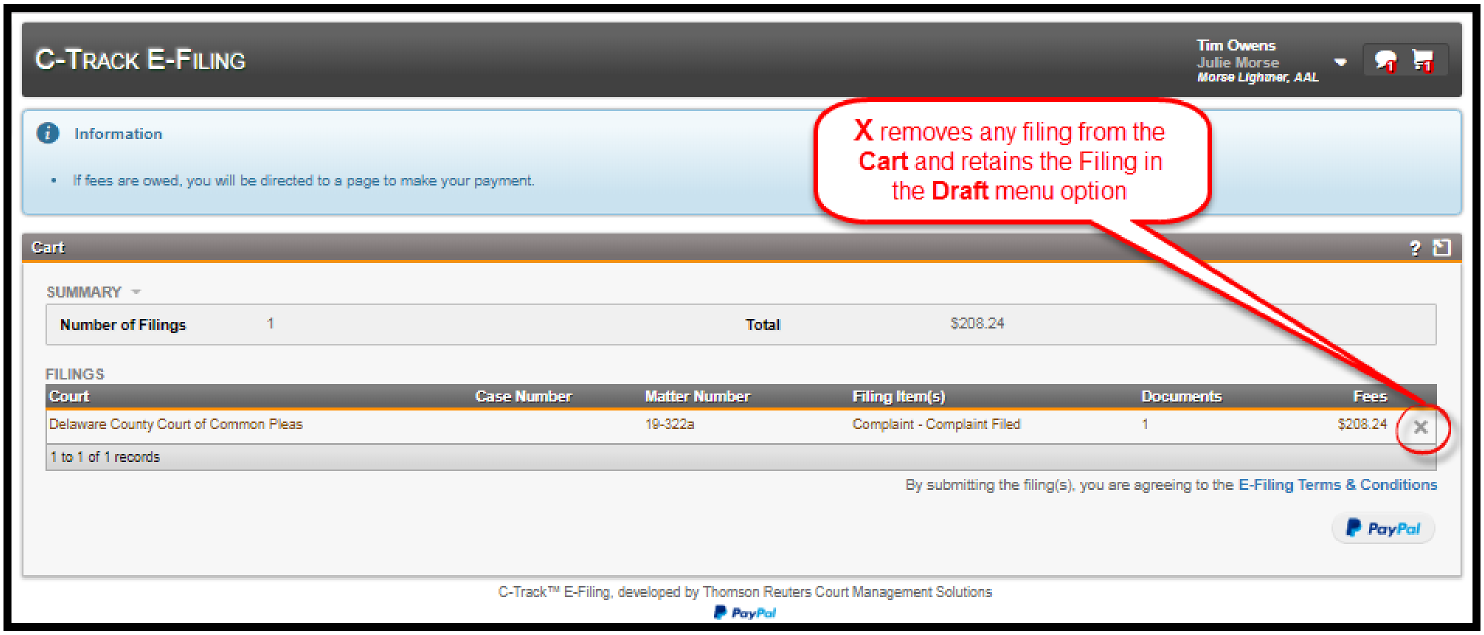


Fig. 1.110: Cart screen – filings ready for Submission

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

A **Confirm** window appears.

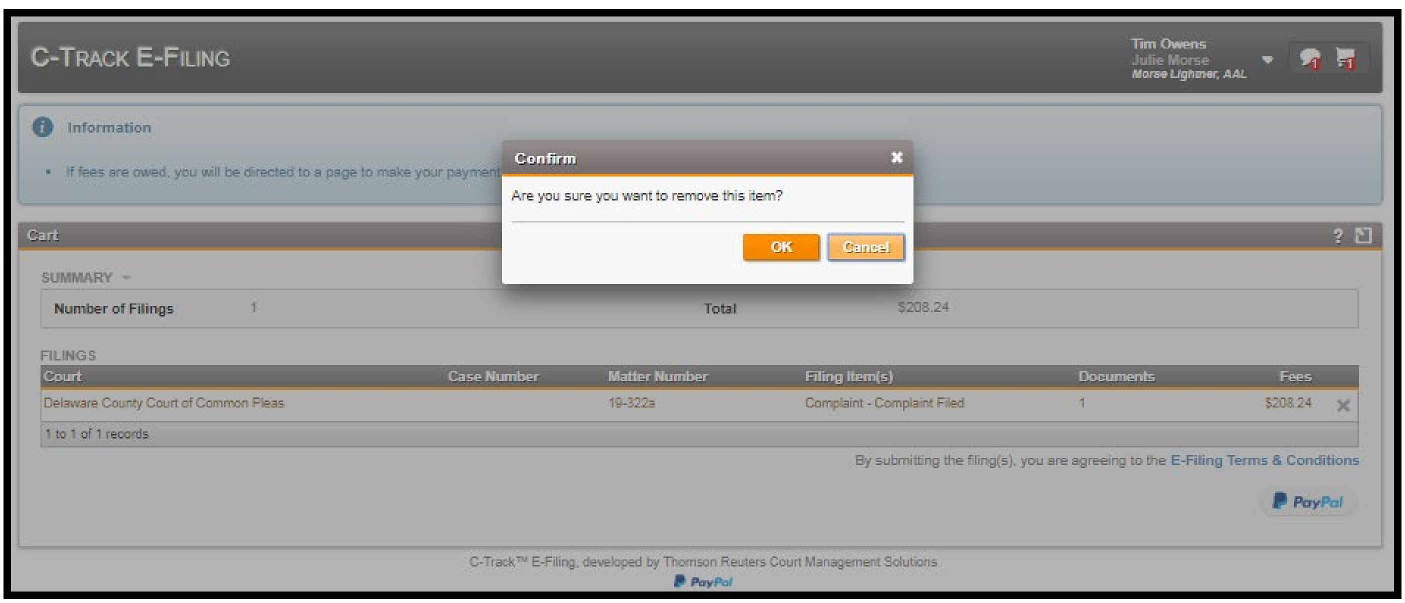


Fig. 1.111: Confirm window – Remove a filing from the Cart

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

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

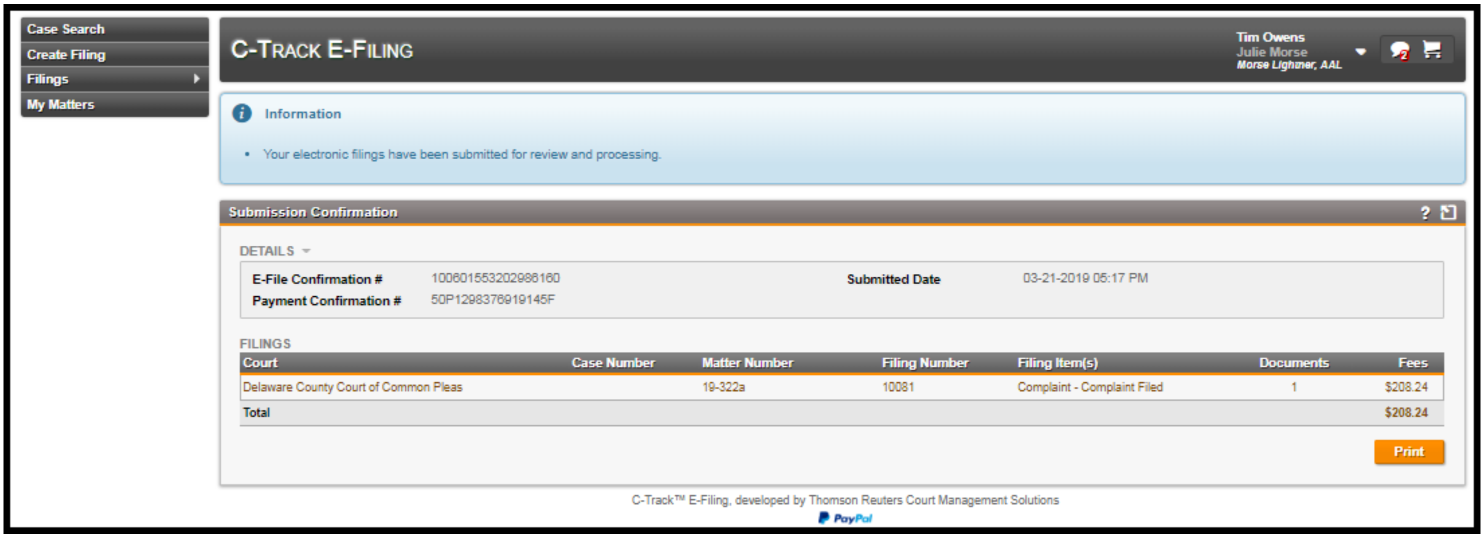


Fig. 1.112: Submission Confirmation screen – Successful submission

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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