How to Assign Organizational Proxy Rights without a Request

PACFile®

1. Open the Manage Organizations screen

Hover over the My Services option and click the 'Manage Organizations' option.

The Unified JUDICIAL SYSTEM of PENNSYLVANIA WEB PORTAL

Home   My Services   Case Information

Court Staff
Manage Organizations

ylvania Judiciary Web Portal

ylvania Judiciary Web Portal provides the public with access to various aspects of court in

2. Access an organization

In the Manage Organization - Search screen, identify the organization you want to add the prospective proxy to and click the Edit Record icon.

Manage Organization - Search

Organization Name: [   ]

[Search]

➕

Organization Name
Allegheny County Juvenile Probation Unit

3. Access the user search

In the Manage Organization screen, click the Add New Record icon above the Organization Users grid.

Organization Users			
First Name	Last Name	Email Address	Date Added
Robert	Struth	struthrobe@yahoo.com	7/21/2014 11:24:35 AM N P 🗑
Keith	Hostler	hosterkeit@yahoo.com	7/21/2014 11:24:35 AM N P 🗑
Ryan	Stengel	rstengel@xyzabc.com	2/9/2015 10:10:48 AM N P 🗑

4. Select a Search Type

In the Add Organization User popup, you have two ways to search for the prospective proxy. Click on the **Search Type** dropdown and select 'Name' or 'PA Bar ID'.
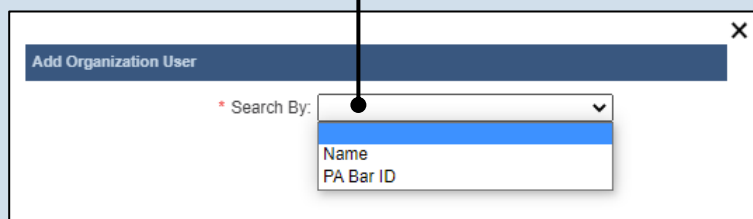
Tip You can use the 'Name' option to search for any attorney or non-attorney. The 'PA Bar ID' search only applies to attorneys and is only useful when you know their bar number.

Tip You can only search for individuals who have a registered PACFile account.

Add Organization User   ✕

* Search By: [⌄]

Name
PA Bar ID

5. Enter your search criteria
Depending on the selected search type, enter the required information related to the prospective proxy.

Tip When prompted to enter a City, enter the city where the proxy works.

Searching by Name

Add Organization User

* Search By: Name
* Last Name: Lincoln
* First Name: Robert
* City: Pittsburgh
* State: Pennsylvania

[Search]

6. Click SEARCH

Searching by Bar ID

Add Organization User

* Search By: PA Bar ID
* PA Bar Number: 999690

[Search]

7. Confirm the individual
When your search results are displayed, locate the appropriate individual and select the checkbox next to their name.

Add Organization User

* Search By: Name
* Last Name: lincoln
* First Name: Robert
* City: Mechanicsburg
* State: Pennsylvania

[Search]

	Account Name	User Name	Email Address	Location	PA Bar Number
☑	rrlincoln	Lincoln, Robert R 2nd	robert_lincoln1@yahoo.com	Pittsburgh, PA	

[Submit]

8. Click SUBMIT
If a popup appears indicating that your changes have been saved, click the OK button.

Organization Users

Account Name	User Name	Email Address	Proxy Rights	Date Added	
rostruth	Struth, Robert A	struthrobe@yahoo.com	CreateAncillaryFilings ApproveFilings SubmitFilings	7/21/2014 11:24:35 AM	N P
kehostler	Hostler, Keith	hosterkeit@yahoo.com	CreateInitiatingFilings CreateAncillaryFilings ApproveFilings SubmitFilings AdministerProxy	7/21/2014 11:24:35 AM	N P
rstengel	Stengel, Ryan	rstengel@xyzabc.com	CreateAncillaryFilings ApproveFilings SubmitFilings	2/9/2015 10:10:48 AM	N P
rrlincoln	Lincoln, Robert R 2nd	robert_lincoln1@yahoo.c...		2/5/2020 12:01:11 PM	N P

9. Click the Edit User Proxy Rights icon
In the Organization Users grid, click this icon for the individual you just added.

10. Assign proxy permissions

In the Manage User Proxy Rights popup, choose the permissions for the proxy by selecting the appropriate checkboxes.

Manage User Proxy Rights

Editing Information for: Lincoln, Robert R 2nd

	Proxy Right Category	Proxy Right Name
☐	Organization Management	Access Management User
☑	PACFile Management	Create Initiating Filings
☑	PACFile Management	Create Ancillary Filings
☑	PACFile Management	Approve Filings
☑	PACFile Management	Submit Filings
☐	PACFile Management	Is Attorney At

Submit

11. Click SUBMIT

If a popup appears indicating that your changes have been saved, click the OK button.
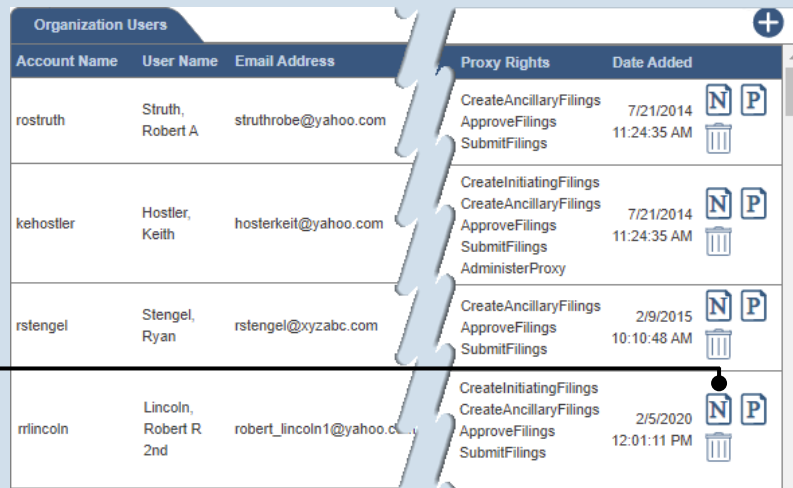
➤ Proxy Right Definitions

- **Access Management User** – Provides the authority to administer the privileges of all proxies in the organization. This privilege designates an individual as an AMU. This checkbox may not be editable. Call the Help Desk if you need assistance with this setting.

- **Create Initiating Filings** – Provides the authority to create a new case filing on behalf of the organization. This does not grant the right to submit these filings.

- **Create Ancillary Filings** – Provides the authority to create filings for an existing case on behalf of the organization. This does not grant the right to submit these filings.

- **Approve Filings** – If your organization requires a submitter to seek supervisory approval before submitting a filing, this checkbox designates these roles. This checkbox should be selected for approvers and deselected for any applicable submitters.

- **Submit Filings** – Provides the authority to submit and, when necessary, pay for a filing. This includes any filings created by any of the other proxies for the organization. This does not grant the right to create or approve filings on new or existing cases.

- **Is Attorney At** - Indicates that the individual is a practicing attorney at the organization and is authorized to file specific documents that would not otherwise be available. Does not apply to most organizations.

12. Click the Edit User Notifications icon
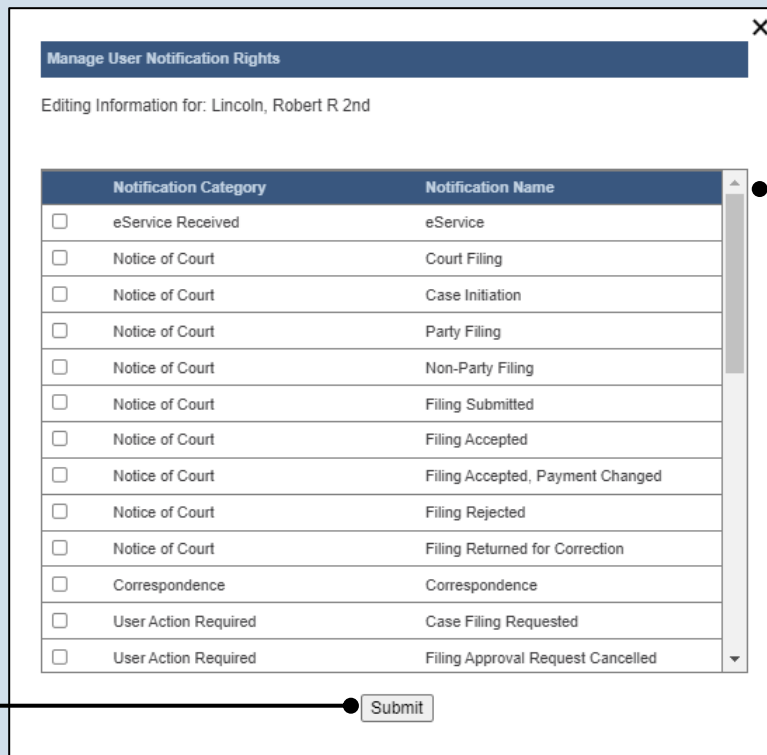
In the Organization Users grid, click this icon for the individual you just added.

Organization Users					
Account Name	**User Name**	**Email Address**	**Proxy Rights**	**Date Added**	
rostruth	Struth, Robert A	struthrobe@yahoo.com	CreateAncillaryFilings ApproveFilings SubmitFilings	7/21/2014 11:24:35 AM	N P
kehostler	Hostler, Keith	hosterkeit@yahoo.com	CreateInitiatingFilings CreateAncillaryFilings ApproveFilings SubmitFilings AdministerProxy	7/21/2014 11:24:35 AM	N P
rstengel	Stengel, Ryan	rstengel@xyzabc.com	CreateAncillaryFilings ApproveFilings SubmitFilings	2/9/2015 10:10:48 AM	N P
rrlincoln	Lincoln, Robert R 2nd	robert_lincoln1@yahoo.c...	CreateInitiatingFilings CreateAncillaryFilings ApproveFilings SubmitFilings	2/5/2020 12:01:11 PM	N P

Manage User Notification Rights

Editing Information for: Lincoln, Robert R 2nd

	Notification Category	Notification Name
☐	eService Received	eService
☐	Notice of Court	Court Filing
☐	Notice of Court	Case Initiation
☐	Notice of Court	Party Filing
☐	Notice of Court	Non-Party Filing
☐	Notice of Court	Filing Submitted
☐	Notice of Court	Filing Accepted
☐	Notice of Court	Filing Accepted, Payment Changed
☐	Notice of Court	Filing Rejected
☐	Notice of Court	Filing Returned for Correction
☐	Correspondence	Correspondence
☐	User Action Required	Case Filing Requested
☐	User Action Required	Filing Approval Request Cancelled

Submit

13. Assign proxy permissions

In the Manage User Notification Rights popup, select the checkboxes for the types of notifications that the proxy should receive.

Tip This step authorizes the proxy to receive all or some of the same dashboard notifications that are sent to the organization. See the Organizational Proxy Notification Types reference guide for an overview of the available notification types that can be delegated.

14. Click SUBMIT

If a popup appears indicating that your changes have been saved, click the OK button.

.