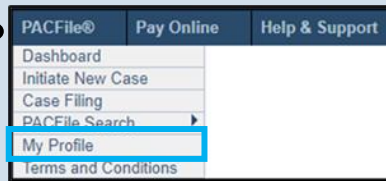


How to Assign Proxy Rights without a Request

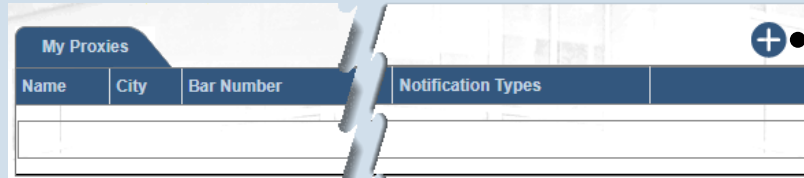
1. Open the My Profile screen

Click on the PACFile menu and select the 'My Profile' option.



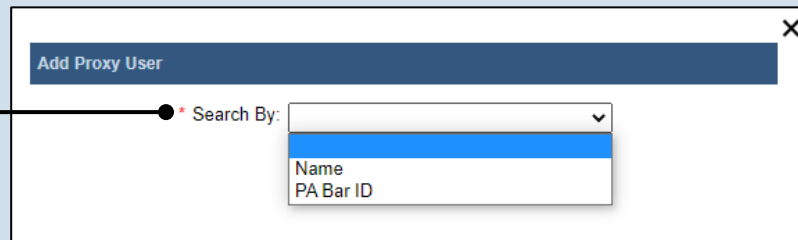
2. Click the Add New Record icon

In the My Profile screen, this icon appears above the My Proxies grid.



3. Select a search type

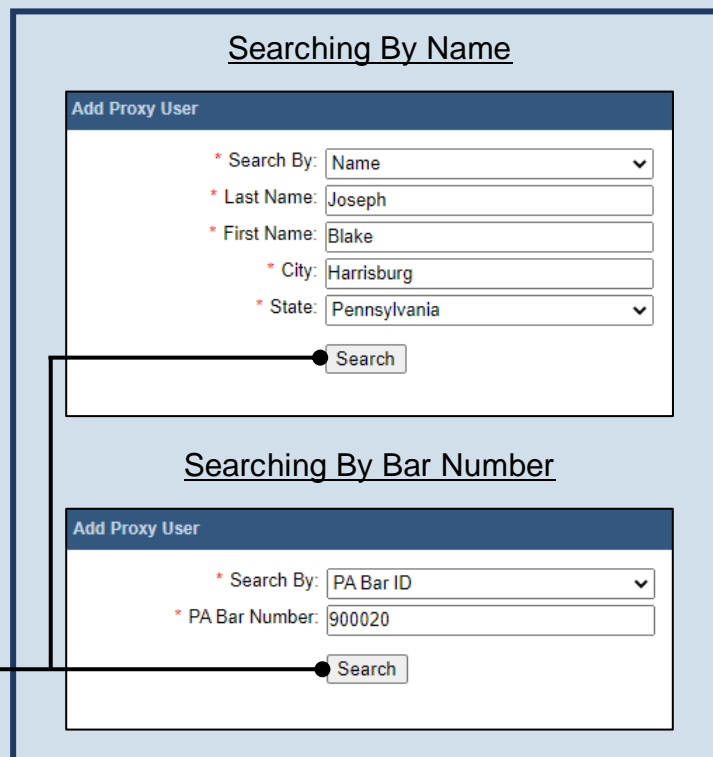
In the Add Proxy User screen, you have two ways to search for the prospective proxy. Click on the **Search By** dropdown and select 'Name' or 'PA Bar ID'.



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.

5. Click SEARCH



4. Enter your search criteria

Depending on the selected search type, enter the required information related to the prospective proxy.

Tip: If asked to enter a city, enter the one where the proxy works.

How to Assign Proxy Rights without a Request

6. Confirm the individual

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

Name	Email Address	Address	City	Bar Number
<input checked="" type="checkbox"/> Joseph, Blake	900020@test.ars	900020 Mailing Street	Harrisburg, PA	900020

7. Click SUBMIT

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

8. Access proxy permissions

In the My Profile screen, locate the individual in the My Proxies grid and click the Edit User Proxy Rights icon.

Name	City	Notification Types
Joseph, Blake	Harrisburg, PA	

9. Assign proxy permissions

In the User Proxy Rights screen, select the checkbox for each proxy right you want to assign to the selected individual.

Proxy Right Category	Proxy Right Name
<input type="checkbox"/> Organization Management	Access Management User
<input checked="" type="checkbox"/> PACFile Management	Create Initiating Filings
<input checked="" type="checkbox"/> PACFile Management	Create Ancillary Filings
<input checked="" type="checkbox"/> PACFile Management	Approve Filings
<input checked="" type="checkbox"/> PACFile Management	Submit Filings

Tip Each of the proxy rights available are defined on the bottom of the next page.

10. Click SUBMIT

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

How to Assign Proxy Rights without a Request

11. Access proxy notifications

In the My Profile screen, locate the same individual in the My Proxies grid and click the Edit User Notifications icon.

Name	City	Notification Types
Joseph, Blake	Harrisburg, PA	

<input checked="" type="checkbox"/>	Proxy Notification Category	Proxy Notification Name
<input checked="" type="checkbox"/>	eService Received	eService
<input checked="" type="checkbox"/>	Notice of Court	Court Filing
<input checked="" type="checkbox"/>	Notice of Court	Case Initiation
<input checked="" type="checkbox"/>	Notice of Court	Party Filing
<input checked="" type="checkbox"/>	Notice of Court	Non-Party Filing
<input checked="" type="checkbox"/>	Notice of Court	Filing Submitted
<input checked="" type="checkbox"/>	Notice of Court	Filing Accepted
<input checked="" type="checkbox"/>	Notice of Court	Filing Accepted, Payment Changed
<input checked="" type="checkbox"/>	Notice of Court	Filing Rejected
<input checked="" type="checkbox"/>	Notice of Court	Filing Returned for Correction
<input checked="" type="checkbox"/>	Correspondence	Correspondence
<input checked="" type="checkbox"/>	User Action Required	Case Filing Requested

12. Assign proxy notifications

In the User Notifications screen, select the checkbox for each notification type you want the selected individual to receive.

Tip Each of the notification types are defined in the *Person-to-Person Proxy Notification Types* reference guide.

Tip To select all notifications, click the checkbox at the top of the column (to the left of the **Proxy Notification Category** column name).

13. 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 your other proxies. Any proxy that is assigned this privilege does not have the authority to grant it to anyone else.
- **Create Initiating Filings** – Provides the authority to create a new case filing on your behalf. This does not grant the right to approve or submit these filings.
- **Create Ancillary Filings** – Provides the authority to create filings for an existing case on your behalf. This does not grant the right to approve or submit these filings.
- **Approve Filings** – Delegates your supervisory authority to approve filings created on your behalf. The use of the approval process is optional. If not using the approval process, this privilege should be assigned to anyone who also has the Submit Filings privilege.
- **Submit Filings** – Provides the authority to submit and, when necessary, pay for a filing. This includes any filings created by you or your other proxies. This does not grant the right to create or approve filings on new or existing cases.