



Bulletin # 3-14

June 15, 2014

Questions? Contact
the Help Desk at
(717)-795-2097

Abbreviated Attorney Searches in Filing Wizard

A new feature has been added to PACFile that is designed to streamline the process of adding an attorney to a filing through the ADD button in the Counsel tab.

The attorneys that were a part of the selected intermediate appellate court case are listed below. Confirm that the following attorneys are correct. All other attorneys must be recorded using the ADD button.

Show counsel information for: 4040 WDA 2011

Counsel				
Counsel	Docket Number	Representing	Edit	Remove
Baker, Aaron	4040 WDA 2011	Wall, Jeffrey B.	Edit	Remove
Bale, Misti	4040 WDA 2011	Wall, Bonnie	Edit	Remove
Metz, Lisa M.	4040 WDA 2011	Wall, Jeffrey B.	Edit	Remove
Add				

Previous Next Save Verify Cancel

Previously, within the Add/Edit Counsel screen, an attorney had to be identified using a two-step process: (1) the selection of 'Name', 'Bar Number', or 'Law Firm' from the **Search Type** dropdown and (2) the entry of the uniquely identifying characteristic that allows PACFile to locate the appropriate attorney.

Beginning today, the **Search Type** field now contains a new option, 'Myself', which abbreviates the search process. This predefined search, which is now the default option, is executed simply by clicking the SEARCH button.

Add/Edit Counsel

Search Type: Myself

Search Clear

Counsel	Bar Number	Law Firm
Select Mara, Luther	090999	Baker & Werner, L.L.P.

OK Cancel



June 15, 2014

If you are an attorney who is attempting to add your own name, which is common when filing an entry of appearance, completing this search automatically locates you by the bar number associated to your UJS Web Portal account.

If you are filing on behalf of an attorney and attempting to add that attorney to a PACFiling, the 'Myself' function works in much the same way. Clicking the SEARCH button automatically locates the attorney you are proxying for based on the individual you selected at the beginning of the filing process.

The image shows two screenshots from a PACFiling application. The top screenshot is titled "Add/Edit Counsel" and features a "Search Type" dropdown menu set to "Myself". Below the menu are "Search" and "Clear" buttons. A table lists search results with columns for "Counsel", "Bar Number", and "Law Firm". The first entry is "Mara, Luther" with bar number "099999" and law firm "Baker & Werner, L.L.P.". At the bottom are "OK" and "Cancel" buttons. The bottom screenshot is titled "Proxy Selection" and contains the text: "Your account settings indicate that you have proxy rights that allow you to file behalf of someone else. Please select one of the following with respect to this filing. If you are filing on behalf of someone else, you must identify the name individual in the dropdown." Below this text are two radio button options: "I am filing as myself." (unselected) and "I am filing on behalf of someone else." (selected). A dropdown menu below the second option is set to "Mara, Luther". At the bottom are "OK" and "Cancel" buttons. A red callout box with a white background and red border contains the text: "When you are filing on behalf of an attorney, a 'Myself' search identifies the same attorney you selected in the Proxy Selection screen." Red lines connect the callout box to the "Myself" dropdown in the top screenshot and the "Mara, Luther" dropdown in the bottom screenshot.

Counsel	Bar Number	Law Firm
Select Mara, Luther	099999	Baker & Werner, L.L.P.

This new search option provides the quickest way to perform these types of attorney searches, but name, bar number, and law firm searches continue to remain available for use.



June 15, 2014

The 'Myself' search option is also available through the Add/Edit Participants screen, which appears after clicking the ADD button in the Participants tab. There are few situations, if any, however, where the filing attorney would need to be added as a participant on an Appellate Court case. Consequently, this search has no use in these instances. When accessing this screen, it is probable that you will need to click the ADD NEW button to create a new participant record.

The screenshot shows the 'Add/Edit Participants' window. At the top, the title bar reads 'Add/Edit Participants'. Below the title bar, there is a 'Search Type:' dropdown menu currently set to 'Myself'. Underneath the dropdown are three buttons: 'Search', 'Clear', and 'Add New'. The 'Add New' button is highlighted with a red rectangular box. At the bottom of the window, there are 'OK' and 'Cancel' buttons.

When you click ADD NEW, two additional tabs are now visible. These tabs are not applicable to Appellate Court filings and can be ignored. The Contact Information and Represented By tabs, which have always been available, remain unchanged and can continue to be used normally.

This screenshot shows the 'Add/Edit Participants' window with several tabs visible: 'Contact Information', 'Demographic Information', 'Identifying Information', and 'Represented By'. The 'Demographic Information' and 'Identifying Information' tabs are highlighted with red boxes. A red arrow points from a text box to the 'Identifying Information' tab. The form contains various input fields for participant details, including 'Participant Category' (set to 'Person'), 'First Name', 'Middle Name', 'Last Name', 'Generation', 'Phone 1', 'Phone 2', 'Fax Number', 'Email Address', 'Role', 'Address Type', 'Line 1', 'Line 2', 'Line 3', 'City', 'State', and 'Zip Code'. At the bottom, there are 'OK' and 'Cancel' buttons.

These tabs are new to the Add/Edit Participants screen, but they do not apply to Appellate Court filings.