



PACFILE RELEASE NOTES

Unified Judicial System Web Portal

Version # 2.11.523

May 23, 2015

Questions?

Appellate Help:
717-795-2097

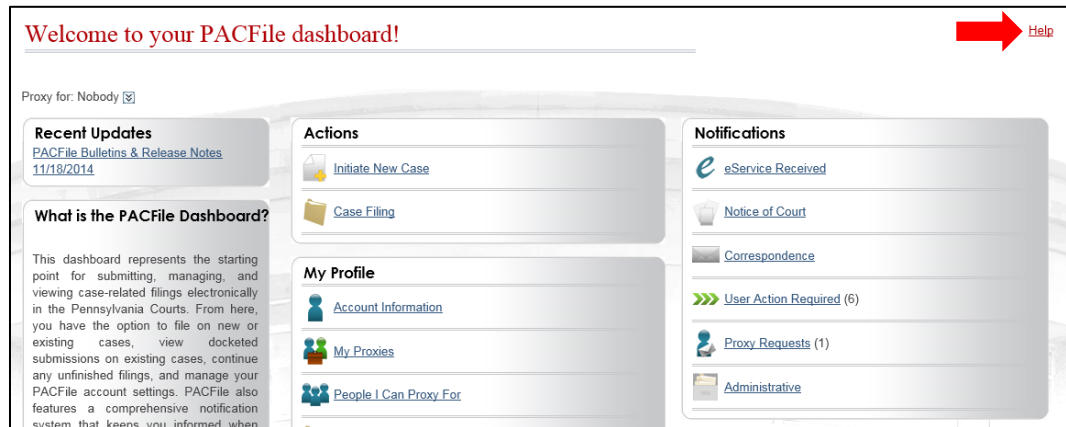
Common Pleas Help:
1-877-227-2672

Approval Process, Dashboard, and Notifications Enhancements

Release notes describe a series of systematic enhancements that have been implemented within PACFile to improve your overall user experience. This document categorizes these changes so all related enhancements are grouped together for your convenience. Please consult the table of contents below, and the pages that follow, to learn more about the enhanced areas within PACFile.

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More information on each of these topics is available in the PACFile Help system, which is accessible through the *Help* link that appears on every PACFile-related screen on the UJS Web Portal.





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Visual Changes to the Dashboard

1. **A new Dashboard section, titled Other Searches, has been added** – This section includes three new screen options: Case Participant Search, Calendar Event Search, and Calendar. These screens are discussed in more detail in notes #4, #5, and #6.
2. **Addition of the My Proxies screen for non-attorneys** – The ability to assign proxies, which was previously limited to PACFile-registered attorneys, can now be completed by anyone who uses PACFile. The My Proxies screen allows you to delegate your filing privileges to other PACFile-registered users and view/update your existing proxies and their assigned rights.
3. **The Attorneys I Can Proxy For option has been renamed People I Can Proxy For** – The use of this option has not changed, but has been renamed since it is now possible for individuals to proxy for any PACFile-registered user, not just attorneys.

The screenshot shows the PACFile dashboard interface. At the top, it says "Welcome to your PACFile dashboard!" with a "Help" link. Below this, there's a "Proxy for: Nobody" dropdown. The dashboard is divided into several sections:

- Recent Updates:** Links to "PACFile Bulletins & Release Notes" dated 11/18/2014.
- What is the PACFile Dashboard?:** A text block explaining the dashboard's purpose and providing contact information for technical issues.
- Actions:** Includes "Initiate New Case" and "Case Filing".
- My Profile:** Contains "Account Information", "My Proxies" (annotated with a red circle and arrow labeled '2'), "People I Can Proxy For" (annotated with a red circle and arrow labeled '3'), "Manage Case Access Codes", and "Manage Notification Settings".
- Find a Filing:** A search box with a "Tracking No:" label and a search button.
- Find a Case:** A search box with a "Docket No:" label and a search button, with an "Advanced Search" link below.
- Notifications:** Lists "eService Received", "Notice of Court", "Correspondence", "User Action Required (6)", "Proxy Requests (1)", and "Administrative".
- Filings:** Shows "Filings In Progress (4)" and "Recently Submitted Filings".
- Case Information:** Includes "Court Filings" and "My Cases".
- Other Searches:** A new section at the bottom right containing "Case Participant Search", "Calendar Event Search", and "Calendar" (annotated with a red circle and arrow labeled '1').



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New screen options

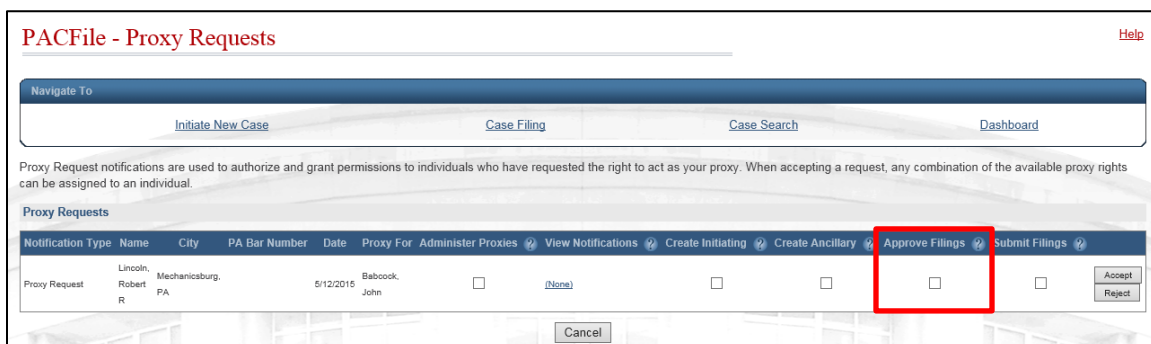
The following screens are have been implemented for individuals working with Common Pleas court cases:

- 4. **Case Participant Search** – A search function that makes it possible to locate the Common Pleas court cases associated with a specific case participant. Participants may be involved in both public and secure cases. Your ability to view secure case information is dependent on your association with a participant’s case(s) and PACFile’s ability to verify your identity.
- 5. **Calendar Event Search** – A search function that makes it possible to locate scheduled court calendar events related to a specific court case, case participant, or across multiple cases and participants. Calendar events may be related to both public and secure cases. Your ability to view secure case information is dependent on your association with the corresponding case(s) and PACFile’s ability to verify your identity.
- 6. **Calendar** – Provides the ability to view the scheduled events on a specific Common Pleas court calendar. Calendar access must be requested of, and approved by, the court responsible for its maintenance. This screen includes an access request feature that directly notifies the court.

Introduction of the case filing Approval Process

The ‘approval process’ is a new and optional feature within PACFile that provides anyone with proxies the ability to implement an internal review process for filings created on their behalf. If utilized, when a proxy creates a filing, they can be required to submit it to another individual in the proxy relationship for review and approval. There are several new enhancements in PACFile related to this feature:

- 7. **Addition of the Approve Filings proxy privilege** – When one individual requests the right to proxy on behalf of another, the individual who is granting their rights now has the ability to assign the ‘Approve Filings’ option in the Proxy Requests screen.





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This option has two uses and must be assigned or withheld with care:

(a) If you have proxies, and want to implement a filing approval process, this checkbox should be deselected for any proxy that should not be able to file without consent. Alternatively, this checkbox can be selected for any proxy who should be authorized to approve the filings created by other proxies. The person who is delegating their rights always maintains the authority to approve the filings created on their behalf. Therefore, it is not necessary for any proxy to have this privilege if the delegating authority wants to maintain sole approval and submission rights.

Settings for a proxy who must request approval for filings created on another's behalf:

Approve Filings ?	Submit Filings ?
<input type="checkbox"/>	<input type="checkbox"/>

Settings for a proxy that can approve and submit filings created on another's behalf:

Approve Filings ?	Submit Filings ?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

(b) If you have proxies, but do not want to utilize a filing approval process, this checkbox must be selected for any proxy that also has the 'Submit Filings' privilege. No proxy can submit a filing without both the 'Approve Filings' and 'Submit Filings' privilege. As of May 23rd, 2015, any existing proxy with the 'Submit Filings' privilege has been automatically assigned the 'Approve Filings' privilege. This default can be altered manually within each proxy relationship as needed. Moving forward, as new proxies are created, the 'Approve Filings' privilege must be assigned manually.

Settings for a proxy who can create and submit filings without approval:

Create Initiating ?	Create Ancillary ?	Approve Filings ?	Submit Filings ?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The 'Approve Filings' privilege can also be delegated through any organizational proxy relationships that have been created in PACFile.



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8. **Required selection of a Verification Action on the Payment and Submission screen** – A new field, **Verification Action**, has been added to the Payment and Submission screen (appears after clicking the VERIFY button on the filing wizard). This new field determines where the filing should be routed depending on the proxy relationship status of the submitter.

Payment and Submission

The filing(s) you have prepared is ready for submission. Select the checkbox below to acknowledge your authority to submit the filing(s) and then click the OK button.

If the filing carries a fee that requires immediate payment, you will proceed to the checkout process. Payment must be remitted before document eService is performed and the filing(s) is submitted to the court. If the filing(s) carries a fee that will be invoiced, or no fee exists, clicking the OK button performs immediate eService and submission to the court.

Choose an action below.

* Verification Action:

Description	Filing Type	Filing Name(s)	Docket #	Created By	Tracking Number	Status	Fee	
None entered	Initiating Filing	* Petition for Review	Petition for Review	Lincoln, Robert	Lincoln, Robert R	WCMWHB00000532	Not Submitted	\$65.50

* indicates primary filing

Subtotal: \$65.50

Total Invoiced: \$0.00
Total Due Today: \$65.50

OK Cancel

*If the submitter is part of a proxy relationship...there are up to four options to choose from in the **Verification Action** field, the availability of which depends on the individual's role in the process:*

- ◆ **Submit to Court** – Available to select when an individual is eligible to send a filing directly to the court.
- ◆ **Request Approval** – Available to select when an individual needs to send a filing to another person within their proxy relationship, prior to submission, for review and approval.
- ◆ **Return for Correction** – Available to approvers within a proxy relationship when they want to send a filing back to the individual that created it, unapproved, because some form of modification is needed.
- ◆ **Request Submission** – Available to approvers within a proxy relationship when they want to send a filing to an eligible submitter, in an approved status, so it can be filed with the court.

If the submitter is not part of a proxy relationship...only the 'Submit to Court' option should be used. In these instances, the submitter is unaffected by this feature and can proceed with the filing normally.



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9. **Restructuring of the Filings in Progress screen** – The type of filings that appear in this screen have been altered to accommodate the new approval process feature. The following defines the new categories for this screen:

- ◆ **Saved Filings** – Displays filings that have been saved and discontinued prior to being submitted to the court.
- ◆ **Approval Requested** – Displays saved filings with completed To Do Lists that were assigned to a supervisory authority for approval prior to submission. These are instances where the individual who created the filing selected the ‘Request Approval’ verification action in the Payments and Submission screen and the name of a specific approver.
- ◆ **Submission Requested** – Displays saved filings with completed To Do Lists that have been approved by a supervisory authority and are awaiting submission to the court. These are instances where the approver selected the ‘Request Submission’ verification action in the Payments and Submission screen and the name of a specific submitter.

Saved Filings

Description	Filing Type	Filing Name(s)	Docket Number(s)	Document(s)	Filer(s)	Created By	Save Date	Tracking Number	Status	Fee
<input type="checkbox"/> View/Edit	None entered	Initiating Filing	* Petition for Review	Petition for Review	Roberts, Carl	Babcock, John	5/1/2015	WCMWHB90000288	Not Submitted	\$65.50 Delete
<input type="checkbox"/> View/Edit	None entered	Initiating Filing	* Petition for Review	Petition for Review	Roberts, Carl	Babcock, John	5/5/2015	WCMWHB90000313	Not Submitted	\$65.50 Delete

Summary Report

Approval Requested

Description	Filing Type	Filing Name(s)	Docket Number(s)	Document(s)	Filer(s)	Created By	Save Date	Tracking Number	Status	Fee
<input type="checkbox"/> View	None entered	Initiating Filing	* Petition for Review	Petition for Review	Roberts, Carl	Babcock, John	5/11/2015	WCMWHB90000586	Approval Requested	\$65.50 Delete

Summary Report

Submission Requested

Description	Filing Type	Filing Name(s)	Docket Number(s)	Document(s)	Filer(s)	Created By	Save Date	Tracking Number	Status	Fee
<input type="checkbox"/> View	None entered	Initiating Filing	* Petition for Review	Petition for Review	Roberts, Carl	Babcock, John	5/11/2015	WCMWHB90000585	Submission Requested	\$65.50 Delete

Summary Report

**This screen continues to display all filings created by you or by those in a mutual proxy relationship*



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Improved control of Proxy notification rights

10. **Delegating partial proxy notification rights** – The View Notifications privilege, which is available to assign to each proxy, has been enhanced to provide greater control. Previously, a proxy could only receive all or none of the Dashboard notifications that are sent to the individual or organization for which they are proxying. Moving forward, it is possible to assign each proxy any combination of the notifications that the granting authority is eligible to receive. The View Notifications privilege is now assigned through a link that allows the granting authority to make these customized selections.

Administer Proxies ?	View Notifications ?	Create Initiating ?	Create Ancillary ?	Approve Filings ?	Submit Filings ?
<input type="checkbox"/>	(None)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Notification Types

- eService Received
 - eService
- Notice of Court**
 - Court Filing
 - Case Initiation
 - Party Filing
 - Non-Party Filing
 - Filing Submitted
 - Filing Accepted
- Correspondence**
 - Correspondence
- User Action Required**
 - Case Filing Requested
 - Filing Ready for Review
 - Filing Ready for Submission
 - Filing Returned for Correction
 - Filing Not Submitted

OK



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Notification Forwarding

11. Ability to forward notifications within a proxy relationship – Within each of the notification categories on your Dashboard, a FORWARD button is now available that makes it possible, under certain circumstances, to send a copy of a notification to another PACFile user. This function is made possible by the proxy relationships that exist for a notification's direct recipient.

For the purposes of this topic, the term 'direct recipient' is used to describe the person or organization that is listed as the "Sent To" on a notification. All notifications have a "Sent To" and this person/organization usually has a direct association to the corresponding case as an attorney or case participant. A 'proxy recipient', further, is a person who receives notifications based on a proxy relationship with a direct recipient. This includes proxies for both individuals and organizations.

The screenshot shows the 'PACFile - User Action Required' interface. At the top, there is a 'Navigate To' bar with links for 'Initiate New Case', 'Case Filing', 'Case Search', and 'Dashboard'. Below this is a message explaining that 'User Action Required notifications represent instances where a problem has been found with a filing created by you or your proxy.' A 'Filter' button is set to 'Unread Only'. The main part of the interface is a table of notifications. The table has columns for Message, Notification Type, Lead Case Caption, Filing Name, Received Date, Filed Date, Filing Type, Tracking Number, Docket Number, Submitter, Filers, Status, Comment, and Sent To. One notification is visible: 'Filing WCMWHB90000532 has not been submitted'. The 'Sent To' field for this notification is 'Lincoln, Robert R', which is highlighted with a red box. Below the table are buttons for 'Select All', 'Deselect All', 'Mark Read', 'Mark Unread', 'Forward', and 'Cancel'. The 'Forward' button is also highlighted with a red box.

Message	Notification Type	Lead Case Caption	Filing Name	Received Date	Filed Date	Filing Type	Tracking Number	Docket Number	Submitter	Filers	Status	Comment	Sent To
<input checked="" type="checkbox"/> View Filing WCMWHB90000532 has not been submitted	Filing Not Submitted	Petition for Review		5/13/2015		Petition for Review	WCMWHB90000532		Lincoln, Robert R	Lincoln, Robert	Not Submitted		Lincoln, Robert R

The practice of forwarding a notification to another person is safeguarded by the following rules:

- ◆ Notifications can only be forwarded by direct recipients who have at least one proxy or by the proxy of a direct recipient who receives notifications through that proxy relationship.
- ◆ Notifications can only be forwarded to individuals proxying for the direct recipient.

The ability for a proxy to receive notifications through a proxy relationship, as authorized by the granting authority, has no impact on their ability to receive forwarded notifications. For instance, if an individual does not receive any User Action Required notifications stemming from their proxy relationship, this would




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not prevent them from being forwarded User Action Required notifications that others receive from that relationship.

Refer to the PACFile Help System for specific steps on how to forward a notification.

New and updated options in the Manage Notification Settings screen

12. **New Notification options** – The options listed below have been added to the existing list of options appearing on the Manage Notification Settings screen. Like the default setting for all other notification types, the frequency setting for these new options default to ‘Immediately’. For more information about these options, open PACFile, navigate to the Manage Notification Settings screen, and click on the corresponding Learn More icons .

- ◆ Filing Ready for Review
 - ◆ Filing Ready for Submission
 - ◆ Filing Returned for Correction
- } Apply to the Approval Process feature
- ◆ Calendar Access Approved
 - ◆ Calendar Access Request Denied
 - ◆ Calendar Access Request Pending
 - ◆ Calendar Access Request Revoked
- } Apply to the Calendar screen
(accessible through the Other Searches option on the Dashboard)

The Manage Notifications Settings screen allows each person to specify the frequency in which e-mails are sent for each notification type.


13. **Updated definitions for existing Notifications** –Some notification types now have dual uses depending on whether they are related to an Appellate or Common Pleas court case. The following notification types have been affected:

- ◆ Court Filing
- ◆ Case Initiation
- ◆ Party Filing
- ◆ Non-Party Filing

If you have customized your settings for any of these options and could possibly receive them for both Appellate and Common Pleas cases, it is recommended



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that you review your settings to ensure they continue to suit your needs. For more information on what these notifications signify for each court, open PACFile, navigate to the Manage Notification Settings screen and click on the corresponding Learn More icons .