

**PACFile<sup>®</sup>**

Reference Guides

Police Officer  
Edition

<https://ujportal.pacourts.us>

Version 23.1



## Introduction

This is a collection of step-by-step documents, referred to as reference guides, which are intended to provide assistance with some of PACFile's more common processes.

Each guide is targeted to a particular task and includes both mandatory and optional steps to try and assist you with a wide range of PACFile functions. On occasion, you may need to decide what steps apply to you based on the task you are attempting to complete. Furthermore, please note that the pictures appearing in these guides are for reference purposes only and the information displayed is not likely to match what you will see or enter on your screen.

Within this document, each reference guide is grouped by topic. For example, any guides related to 'Proxying' are contained within a single section. Depending on the overall task you are attempting to accomplish, you may need to use multiple guides from one or more of these sections.

When you have completed a reference guide you will see the word 'END' in the bottom left corner of the last page.

Depending on the business practices of your county, it's possible that you may not use all the reference guides available in this book.

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### **Proxying**

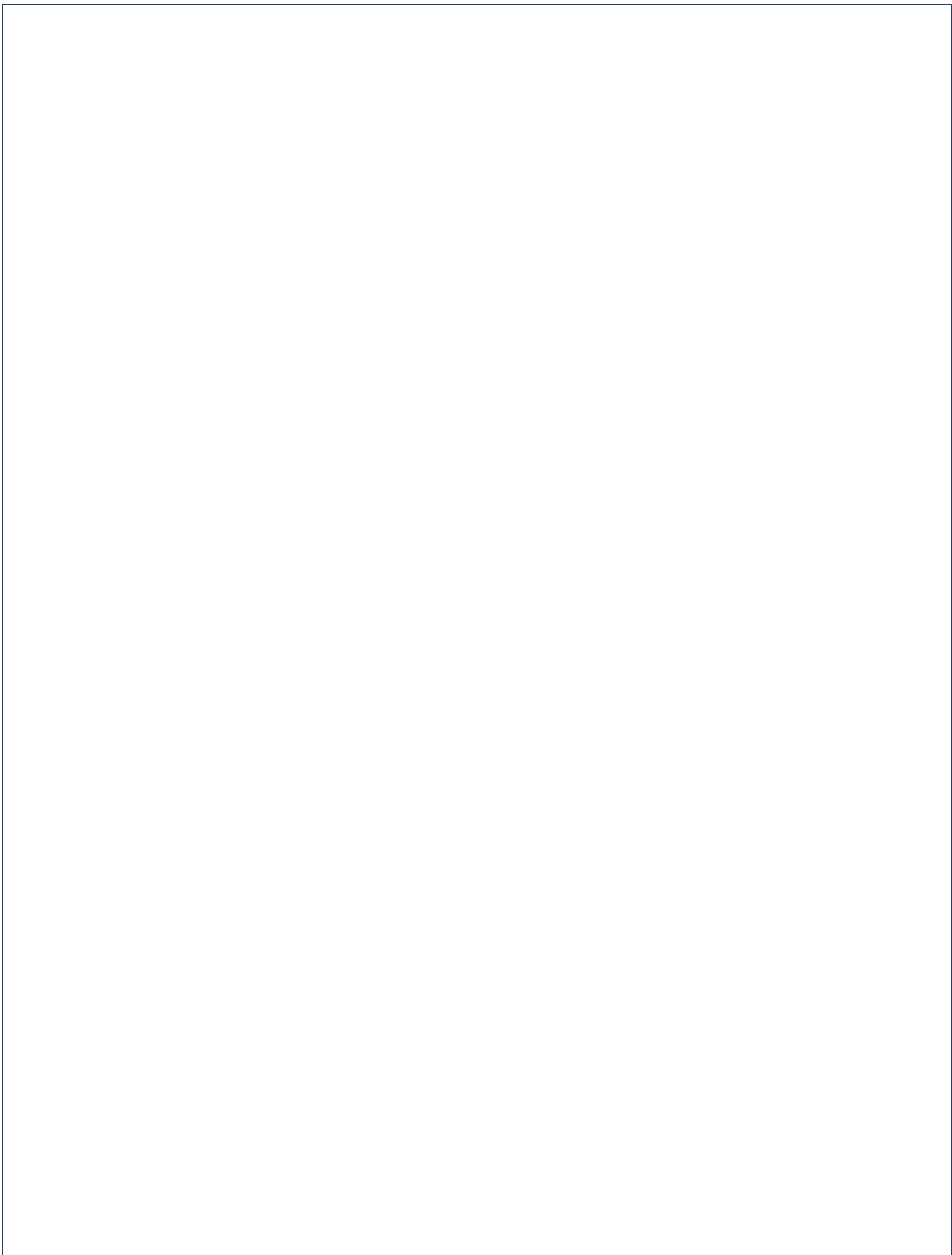
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# Creating Filings

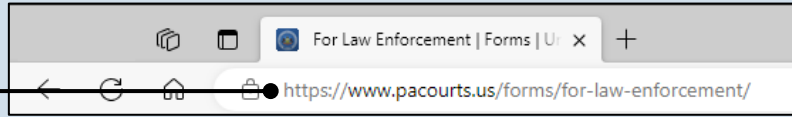


# How to File a Written Allegation of Delinquency

## 1. Locate the Affidavit of Probable Cause form

Open a new web browser page or tab and enter the following address:

[www.pacourts.us/forms/for-law-enforcement/](https://www.pacourts.us/forms/for-law-enforcement/)



## For Law Enforcement

The following forms are available for law enforcement.

### Police Criminal Complaint

Please [log in](#) and enter your username and password. Please direct any questions to [ccform@pacourts.us](mailto:ccform@pacourts.us).

### Search Warrants for Criminal Justice Agencies with an ORI

Please [log in](#) and enter your username and password. Please direct any questions to [ccform@pacourts.us](mailto:ccform@pacourts.us).

### Written Allegation

- |  |  |
|--|--|
| J232A - Written Allegation - Single Summary of Offenses          | J232A - Written Allegation - Single Summary of Offenses                    |
| J232A - Extra Offenses Addendum                                  | J232A - Extra Offenses Addendum  |
| J232B - Written Allegation - Multiples Summaries Of The Offenses | J232B - Extra Offenses Addendum  |
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| J232A - Written Allegation Affidavit of Probable Cause           | J232A - Written Allegation Affidavit of Probable Cause - Continuation Page |
| J232 - Conspirator Data Sheet Addendum                           | J232 - Conspirator Data Sheet Addendum                                     |

## 3. Complete and save the affidavit

Complete the affidavit form and save the document to any location on your computer, shared drive, or movable storage device (ex. memory stick).

**Tip** When using the PDF format: If the text of the affidavit exceeds the available space on the *J232A – Written Allegation Affidavit of Probable Cause* form (one page), save the document. Use form *J232A – Written Allegation of Probable Cause – Continuation Page*, as needed, for all subsequent pages.

WRITTEN ALLEGATION			
Docket Number:	Date Filed:	OTNLiveScan Number	Allegation Number
Juvenile Name:	First	Middle	Last
<b>AFFIDAVIT of PROBABLE CAUSE</b>			
Enter the text of the affidavit here...			
I verify that the facts set forth in this affidavit are true and correct to the best of my knowledge or information and belief. This verification is made subject to the penalties of Section 4904 of the Crimes Code (18 Pa.C.S § 4904) relating to unsworn falsification to authorities.			
Affiant Name	Affiant Signature	Date	

\*Microsoft Word version is pictured above.

## 2. Choose a format for the affidavit

Blank affidavit forms are available in PDF and Microsoft Word formats (see picture). You can use either format, but the affidavit must be uploaded to PACFile as a PDF. See the Tips below before deciding.

**Tip** There are distinct advantages to using each format. Refer to the PACFile Help System, using the *Help* link on any PACFile screen, for more information.

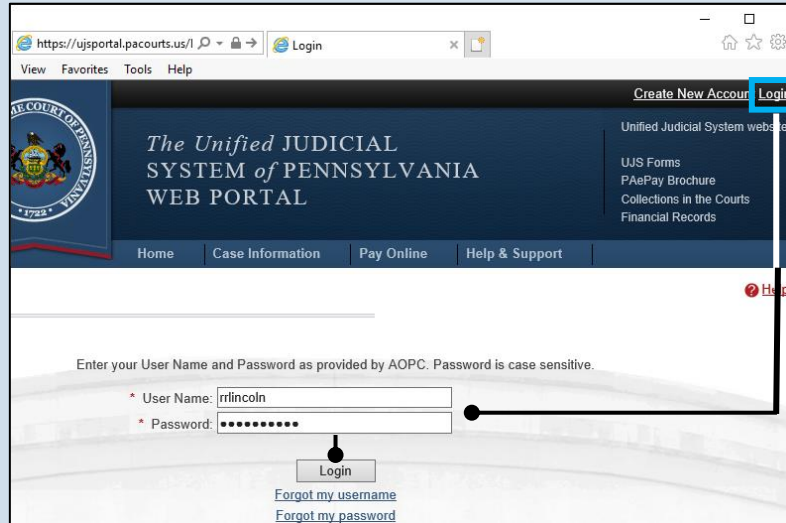
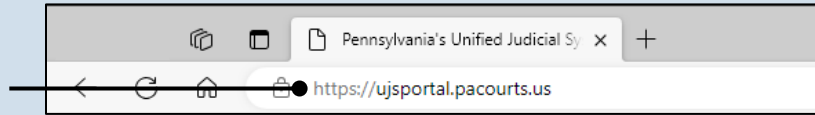
**Tip** A Microsoft Word document can be saved as a PDF. A step-by-step guide for that process can be found in the PACFile Help System by clicking the Step-by-Step Guides link, which appears in box on the help system home page.

# How to File a Written Allegation of Delinquency

## 4. Login to the UJS Web Portal

Open a new web browser page and enter the following address:

<https://ujsportal.pacourts.us>

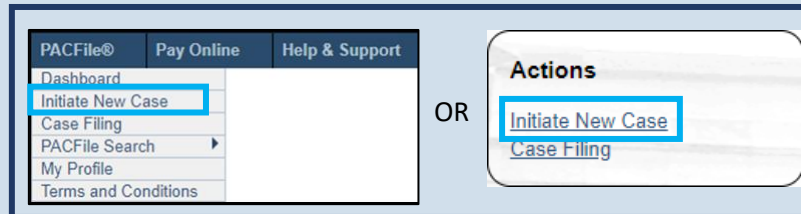


## 5. Login to the UJS Web Portal

Click the Login link, enter your UJS Web Portal user name and password, and click LOGIN.

## 6. Open the case initiation wizard

Click on the 'Initiate New Case' option in the PACFile menu or the *Initiate New Case* link on your Dashboard.

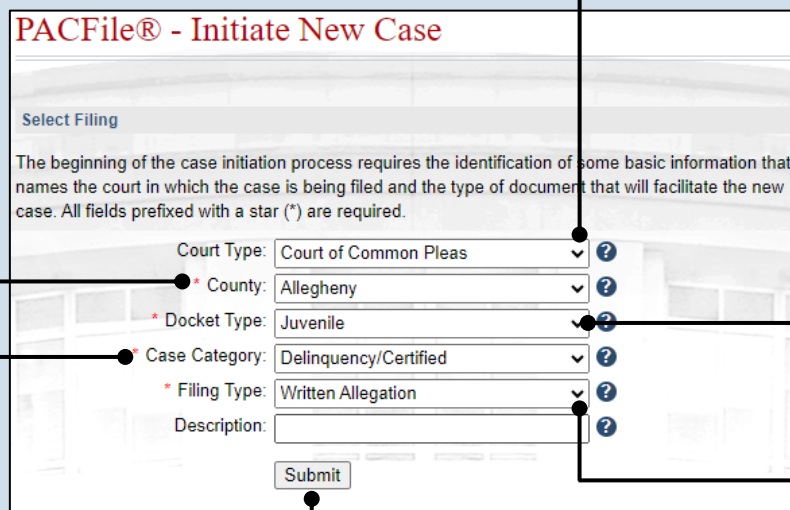


## 7. Select a Court Type

Click the **Court Type** dropdown and select 'Court of Common Pleas'.

## 8. Select a County

Click on the **County** dropdown and select the county court in which the allegation is being filed.



## 9. Verify the Docket Type

In the **Docket Type** field, select 'Juvenile' or verify that it defaults automatically.

## 10. Verify the Case Category

Confirm that the **Case Category** field defaults to 'Delinquency/Certified'.

## 11. Verify the Filing Type

Confirm that the **Filing Type** field defaults to 'Written Allegation'.

## 12. Click SUBMIT



# How to File a Written Allegation of Delinquency

## 13. Verify the Case Source

In the Select Cases screen, confirm that **Case Source** dropdown defaults to 'Agency'.

PACFile® - Initiate New Case

Select Cases

Identify the arresting agency responsible for initiating the allegation.

\* Case Source: Agency

\* Agency: Minersville Police Dept

Ok

## 15. Click OK

## 14. Verify or select an agency

Verify that the **Agency** field defaults correctly or click on the dropdown and select the arresting agency from which you are filing.

Participants Counsel Offenses Filing Documents

This tab is used to identify the case participants for the case. Participants may be listed below automatically. Confirm this information is accurate. All participants and the Juvenile Offender, need to be created using the ADD button.

Show information for: New Case

Participant	Docket	Filer
Yarmush, Beau J.		<input checked="" type="checkbox"/>
Commonwealth of Pennsylvania		<input type="checkbox"/>

## 16. Create the juvenile participant

In the Participants tab, click the Add Participant icon. The Add/Edit Participant popup displays.

# How to File a Written Allegation of Delinquency

## 17. Enter the participant's name

In the Contact Information tab, enter the name of the juvenile in the **First Name** and **Last Name** fields.

**Tip:** The juvenile's middle name can be entered, if known, but it is not required.

## 19. Enter the address of the juvenile (if known)

**Add/Edit Participant**

Contact Information Demographic Information Identifying Information Represented By

Participant Category: Person

\* First Name: Julius

Middle Name:

\* Last Name: Carey

Generation:

Phone Number 1: ( ) - -

Phone Number 1 Ext:

Phone Number 2: ( ) - -

Phone Number 2 Ext:

Fax Number: ( ) - -

Email Address:

\* Role: Juvenile

Address Type: Home

Address Line 1: 123 Main Street

Address Line 2:

Address Line 3:

City: Hazelton

State: Pennsylvania

Zip Code: 18202

International Region:

Postal Code:

Country:

Save

**18. Add the participant role**  
Click on the **Role** dropdown and select 'Juvenile'.

## 21. Enter any information about the juvenile

**Tip:** None, some, or all of the fields in this tab can be completed based on the information available. Some of the information entered automatically appears on the allegation created in Step 55.

**Add/Edit Participant**

Contact Information Demographic Information Identifying Information Represented By

Date Of Birth: 01/01/2013

Place Of Birth: Pennsylvania

Gender: Male

Race: White

Ethnicity: Non Hispanic

Tribal Affiliation:

Hair Color: Black

Eye Color: Hazel

Skin Tone: Medium

Height(feet): 5

Height(inches): 8

Weight(lbs): 87

Save

**20. Click the Demographic Information tab**

# How to File a Written Allegation of Delinquency

22. Click the Identifying Information tab

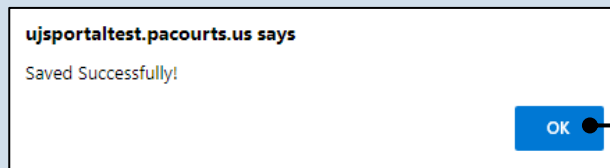
Identifying Information fields:

- SID: \_\_\_\_\_
- SSN: \_\_\_\_\_
- FBI Number: \_\_\_\_\_
- Fingerprint Classification: Fingerprinted
- Drivers License State: \_\_\_\_\_
- Drivers License Number: \_\_\_\_\_
- Drivers License Expiration: mm/dd/yyyy

23. Enter any information about the juvenile

24. Click SAVE

**Tip** None, some, or all of the fields in this tab can be completed based on the information available. Some of the information entered automatically appears on the allegation created in Step 55.



25. On the confirmation message, click OK

26. Create additional participant records

Repeat steps 16-25, as needed, for any other individuals who need to be added to the case (i.e. victims, co-offenders, parents, etc.).

**Tip** Be sure to specify the appropriate role for each individual.

Participants tab description: This tab is used to identify the case participants for the case. They may be listed below automatically. Confirm this information is accurate. All victims and the Juvenile Offender, need to be created using the ADD button.

Show information for: New Case

Participant	Docker	Filer
Yarmush, Beau J.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Commonwealth of Pennsylvania	<input type="checkbox"/>	<input type="checkbox"/>
Carey, Julius	<input type="checkbox"/>	<input type="checkbox"/>

Next Save

The participant record is added to the grid.

27. Click NEXT

# How to File a Written Allegation of Delinquency

## 28. Attorney information available?

If the attorney for any participant is known, continue to the next step. If no attorneys are known, proceed to Step 37.

Participants Counsel Offenses Filing Documents

If participant representation is known, attorneys may be added. If representation is unknown, the identification of counsel is required.

Show information for: New Case

Counsel	Docket Number

**29. Initiate the process to add an attorney**  
In the Counsel tab, click the Add Counsel icon above the grid.

## 30. Perform a search

In the Add/Edit Counsel popup screen, click on the Search Type dropdown and determine how you want to find the attorney that needs to be added to the case. Based on this selection, enter the appropriate number or name in the field below and click SEARCH.

Add/Edit Counsel

Search Type: PA Bar Number

\* PA Bar Number: 900013

Search

Counsel	PA Bar Number	Law Firm
<input checked="" type="radio"/> James, Sherman	900013	

Select

**31. Identify the attorney**  
Based on your search results, identify the attorney you want to add to the case by clicking the radio button that appears to the left of their name, then click SELECT.

## 32. Verify the contact information

The contact information that appears is based on what is on file with the Pennsylvania Disciplinary Board.

Add/Edit Counsel

Contact Information Representing

Participant Category: Person

\* First Name: Sherman

Middle Name:

\* Last Name: James

Generation:

PA Bar Number: 900013

Phone Number 1: (717) 987-6543

Phone Number 1 Ext: 1234

Phone Number 2: ( ) - -

Phone Number 2 Ext:

Fax Number: ( ) - -

Email Address: jsherman@law.net

Address Type: Work

Address Line 1: 123 Main Street

Address Line 2: Suite 6a

# How to File a Written Allegation of Delinquency

### 33. Identify the case participant

Click on the Representing tab and select the checkbox for the appropriate participant.

**Add/Edit Counsel**

Contact Information **Representing**

Representing:  Commonwealth of Pennsylvania (Prosecution)  
 Carey, Julius (Juvenile)

Save

34. Click SAVE

### 35. On the confirmation message, click OK

The counsel record is added to the grid.

ujportaltest.pacourts.us says  
Saved Successfully!

OK

### 36. Additional counsel?

Repeat steps 29-35, as needed, for any other attorneys that need to be added to the case.

### 37. Click NEXT

Participants **Counsel** Offenses Verification

If participant representation is not associated to this filing using the ADD button. If representation is unknown, select 'None'.

Show Information for Docket Number: [Dropdown]

Counsel	Representing
James, Sherman	Carey, Julius

Previous **Next** Save

### 38. Add an offense

In the Offenses tab, click the Add Offense icon.

**Tip** Offenses must be added one at a time.

Participants **Offenses** eService Filings

Use the Add button to specify the offenses that the filer must be identified. If multiple offenses need to be added, each must be identified.

Show Information for Docket Number: [Dropdown]

Seq. No	Lead	Statute	Status
---------	------	---------	--------

+ ↻

# How to File a Written Allegation of Delinquency

## 39. Identify the statute

In the Add/Edit Offenses popup screen, use the three statute fields to enter the **Title**, **Section**, and **Subsection** for the offense.

**Tip:** The **Description** field can be used along with, or separately from, the statute fields. If used, you must enter a word or phrase that appears in the offense description (i.e. theft, movable, etc.).

The screenshot shows the 'Add/Edit Offenses' form with the following fields: Description (empty), Title (18), Section (3921), SubSection (A), and Date of Offense (06/17/2023). A 'Search' button is located below the date field.

40. Enter the offense date

## 41. Click SEARCH

The screenshot shows the search results table with the following entry:

Offense Code	Offense Code	Offense Code	Offense Code	Offense Code
<input checked="" type="radio"/>	18 § 3921 §§ A	Theft By Unlaw Taking-Movable Prop	CC3921A	

A 'Select' button is located below the table.

42. Identify the offense

Select the offense you want to add to the case by clicking the corresponding radio button, then click SELECT.

### 43. Lead offense?

Under the Offense Information section of the Add/Edit Offense popup screen, select the **Is Lead Offense** checkbox if it applies to the new offense.

Add/Edit Offenses

Statute Code:

Statute Description:

Offense Information

\* Sequence Number #:

Is Lead Offense:

Inchoate:

\* Grade:

\* County:

City Town Boro:

\* Offense Date:

Offense Time:

Place Of Offense:

Drug Type:

Drug Amount:

Drug Value:

Blood Alcohol Content:

Victims Over 60:

\* Number Of Offenses To Create:

### 45. Specify the location of the offense

Click on the **City Town Boro** dropdown and select the locality where the offense occurred.

**Tip** The **County** field defaults automatically based on the selection made in Step 8.

### 44. Choose the grade

Click on the **Grade** dropdown and select the appropriate option based on the severity of the offense.

**Tip** For some offenses, this field defaults automatically and cannot be changed.

### 46. Enter any other information

**Tip** No other information is required, but other details (i.e. inchoate, victims over 60, number of offenses) can be entered as it applies.

### 47. Record PennDOT details

When known, this information is recorded under the Incident Information section.

Incident Information

Accident Report Number:

Route:

Allowed MPH:

Speeding MPH:

Offense Incident Conditions

	Incident Condition
<input type="checkbox"/>	Emergency Response Area
<input type="checkbox"/>	Hazardous Material Involved
<input checked="" type="checkbox"/>	Interstate
<input type="checkbox"/>	Safety Zone
<input checked="" type="checkbox"/>	Work Zone
<input type="checkbox"/>	Death to Any Person
<input type="checkbox"/>	Death to Emergency Responder
<input type="checkbox"/>	Serious Injury to Any Person
<input type="checkbox"/>	Serious Injury to Emergency Responder

### 48. Record offense incident conditions

Select any checkboxes for applicable incident conditions.

**Tip** Incident conditions only display in this grid for specific offenses.

### 49. Click SUBMIT

# How to File a Written Allegation of Delinquency

## 50. Add other offenses

Repeat Steps 38-49, as needed, to add any other offenses that apply to the allegation.



**Tip** Only one offense can be designated as the lead offense (Step 43).

## 52. Click NEXT

Participants Counsel **Offenses** Filing Documents Verification

Use the Add button to specify the offenses that the juvenile is alleged to have committed. A lead offense must be identified. If multiple offenses need to be added, each must be added separately.

Arresting Agency: Minersville Police Dept  
Show Information for Docket Number:

Seq. No	Lead	Statute	Statute Description	Grade	Offense Date	Status	
1	<input checked="" type="checkbox"/>	18 § 3921 §§ A	Theft By Unlaw Taking-Movable Prop	F2	06/17/2023	New to Allegation	 

If OTN is entered, please enter allegation or incident number

Offense Tracking Number:

Allegation Number:

Incident Number:

## 51. (Optional) Enter an OTN

In the Offenses tab, click in the **Offense Tracking Number** field and enter the number associated to the case/participant. Then enter either the **Allegation Number** or **Incident Number** and click VALIDATE OTN.

**Tip** If entered, PACFile verifies that the OTN is valid based on the corresponding information on file. As part of this, the participant name and date of birth on file must match the details in the Participants tab. If a mismatch is found, you must update the juvenile's details in the Participants tab to validate the OTN.


Participants Counsel Offenses **Filing Documents** Verification

Based on the filing type selected in the Filing Type tab, the corresponding document(s) that you must upload are listed below.

You must upload at least one electronic file for each required document. Before uploading, click on the document icon in the section below the grid, to view the electronic filing requirements. To upload an electronic document, click on the document icon that appears on the filing row.

It is possible to add other filing types that are not listed below. Click the Add Optional Filing Types button to include in your submission and to upload the electronic document.

Show information for:

Filing Type(s)	Is Included	Document(s)
Written Allegation	✓	
Affidavit of Probable Cause	✓	

## 53. Initiate the process to complete the allegation

In the Filing Documents tab, click on the Written Allegation icon. The Fillable Form popup screen displays.



# How to File a Written Allegation of Delinquency

## 54. Complete the information for the allegation

**Tip** Additional fields display when some fields are completed. Record all available information.

**Fillable Form**

**Juvenile Identification Information**

Docket Number:

Request Lab Services:

Additional Date of Birth:

AKA Juvenile First Name:

AKA Juvenile Middle Name:

AKA Juvenile Last Name:

AKA Juvenile Suffix:

DNA Collected:

MNU Number:

Juvenile Fingerprinted:

Juvenile Photographed:  Juvenile Fingerprinted

**Parents / Guardian Information**

Mother's Whereabouts:

Father's Whereabouts:


Guardian's Whereabouts:

**Final Information**

I ask that a warrant of arrest be issued for the above name Juvenile. (An affidavit of probable cause must be completed, sworn to before the issuing authority, and attached.)

I ask that the Juvenile be brought before the Court to answer the charges I have made.




## 56. Click OK

**Tip** The Written Allegation icon  in the grid updates and displays a pencil to indicate you have accessed the Fillable Form screen.

## 55. Preview the allegation

Click VIEW DRAFT any time to generate a PDF preview of the allegation.

**Tip** When finished with the preview, close the PDF. If needed, make changes to the Fillable Form popup screen, or click OK to return to filing and make additional changes to any tab. Return to the Fillable Form screen and click VIEW DRAFT again to review the changes.

Filing Type(s) <span style="float: right;">+ +</span>			
Filing	Is Included	Document(s)	
Written Allegation	✓		
Affidavit of Probable Cause	✓		

## 57. Access the Document Management screen

In the Filing Documents tab, click the Manage Document icon in the grid for the Written Allegation.

# How to File a Written Allegation of Delinquency

## 58. Select a confidentiality

In the Document Management popup screen, click on the dropdown and choose the appropriate confidentiality for the document.

File Name	Original File Name	File ?	Confidentiality ?	
J232A - Written Allegation.pdf			Confidential Document	

Save

59. Click SAVE

**Tip:** This selection is required based on the court's Public Access Policy. You can view the policy at the following web address:

<http://www.pacourts.us/public-records/public-records-forms>

## 60. Initiate the process to upload the affidavit

In the Filing Documents tab, click the Manage Document icon in the grid for the Affidavit of Probable Cause.

Filing	Is Included	Document(s)	
Written Allegation	✓		
Affidavit of Probable Cause	✓		

## 61. Initiate the process to select the affidavit

In the Document Management popup screen, click the Add Document icon above the grid. A new, blank row displays in the grid.

## 62. Click CHOOSE FILE

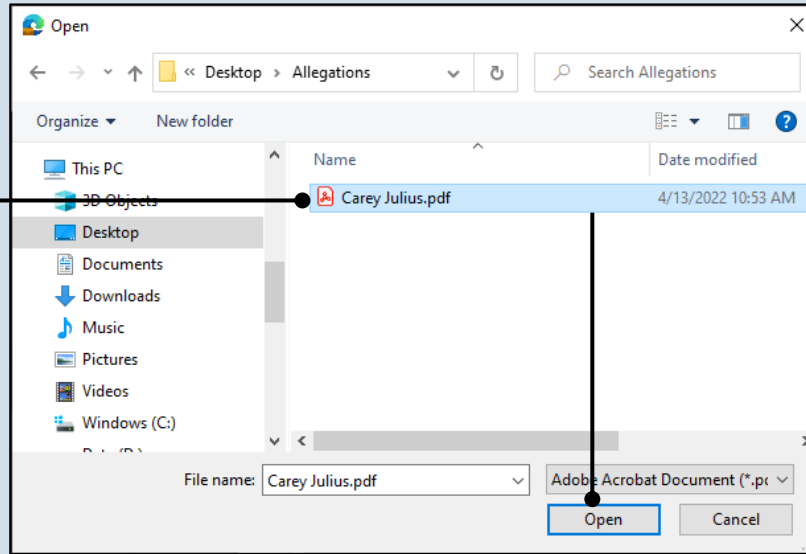
File Name	Original File Name	File ?	Confidentiality ?	
		Choose File No file chosen		

Save

## 63. Upload the electronic version of the filing

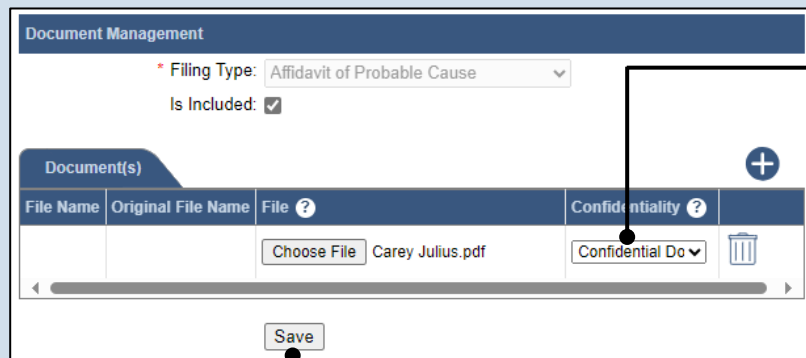
In the popup screen that appears, locate the electronic version of the petition/application that you saved in Step 3. Select the file and click OPEN.

**Tip:** This document must correspond to the child(ren) selected in the Show filing information for dropdown.



## 65. (Optional) Add another document

If you used the PDF format for the affidavit and you have additional documents to attach, repeat Steps 61-64 as needed.



**64. Select a confidentiality**  
Click on the dropdown and choose the appropriate confidentiality for the petition or application.

**66. Click SAVE**

## 67. Certify the filing

Select the checkbox that signifies that the filing complies with the provisions of the Public Access Policy.

**Tip** You can locate the Public Access Policy at the following web address:

<http://www.pacourts.us/public-records/public-records-forms>

Participants | Counsel | Offenses | **Filing Documents** | Verification

Based on the filing type selected in the Filing Type tab, the corresponding requirements are listed below.

You must upload at least one electronic file for each required document type. Click the Manage Documents icon that appears on the filing row.

It is possible to add other filing types that are not listed below. Click the Add Filing Type icon to include in your submission and to upload the electronic document.

Show information for:

Filing Type(s)	Is Included	
Written Allegation	✓	
Affidavit of Probable Cause	✓	

Disclaimer: I certify that this filing complies with the Case Records Public Access System of Pennsylvania.

Specifically, I understand that financial source documents, minors' educational records, Children and Youth Services' records, marital property inventory and pre-trial statements, income and expense statement provided in Pa.R.C.P. 1910.27(c), and agreements under Pa.S. § 3105 must all be filed under the Confidential Document Form cover sheet. See Section 3105.

Furthermore, I understand that the attachments, except for a Confidential Document Form, contain any of the following: social security numbers, financial account numbers (except for the last four digits if the account is the subject of the case and cannot otherwise be identified), driver license numbers, street names and dates of birth (except when the minor is charged as a defendant in a criminal matter), and contact information, as defined in Pa.R.C.P. 1931(a), except for the victim's name. See Section 1931(a).

\* I acknowledge the foregoing Disclaimer

[View Additional Info](#)

Previous | **Next** | Save | Verify

68. Click NEXT

## 69. Verify filing details

In the Verification tab, review the filing information that you have recorded for accuracy. If anything is incorrect, click on the appropriate tab and make the necessary changes.

When the filing is correct, click the VERIFY button.

**Tip** Click the Summary Report icon to generate the Verification Summary Report. You can print or save the report for your records.

Participants | Counsel | Offenses | **Verification**

A summary of your filing information is displayed below. All the information displayed is accurate and that your To Do List is complete. If anything is incorrect, click on the appropriate tab and make the necessary changes.

When you are ready to submit your filing, click the Verify button. If you do not want to submit your filing at this time, click the Save button. Saved filings are available on the Saved Filings tab on your dashboard.

Filers	IFP Status	Role	Counsel
		Affiant	

Referenced Case	Docket Number	Name	Viewable To	Document Name	Upload Date/Time	Is Sealed	Filing Fee
					11/27/2023 11:33 AM		\$0.00
							\$0.00

Previous | Save | **Verify**

## 70. Review the Payment and Submission page

Verify that the correct filing information appears on the Payment and Submission page.

## 72. Choose an action

Select one of the following options from the **Action** dropdown and proceed to the corresponding step:

- 'Request for Approval' – Select if the filing requires supervisory approval prior to submission. Continue to Step 73.

- 'Submit to Court' – Select if the filing can be submitted without additional approval. Proceed to Step 74.

**PACFile® - Payment and Submission** Help

The filing(s) you have prepared is ready for submission. Select the appropriate verification action for filing or complete the appropriate routing information.

Any applicable eService is performed immediately following submission to the court.

**Public Access Policy Certification**

I certify that this filing complies with the provisions of the Case Records Public Access Policy of the court. If you require filing confidential information and documents differently than non-confidential information and documents, you must select the appropriate routing information.

\* Certify:

Choose an action below.

\* Action: **Request For Approval** ?

\* Recipient(s):

Package Information
Invoice
Description
Filing Type
Filing Name(s)
Docket Number(s)
Document(s)
File(s)
Cre
Fee

## 71. Certify the filing

Select the checkbox that signifies that the filing complies with the provisions of the Public Access Policy.

**Tip** You can locate the Public Access Policy at the following web address:

<http://www.pacourts.us/public-records/public-records-forms>

**PACFile® - Payment and Submission** Help

The filing(s) you have prepared is ready for submission. Select the appropriate verification action for filing or complete the appropriate routing information.

Any applicable eService is performed immediately following submission to the court.

**Public Access Policy Certification**

I certify that this filing complies with the provisions of the Case Records Public Access Policy of the court. If you require filing confidential information and documents differently than non-confidential information and documents, you must select the appropriate routing information.

\* Certify:

Choose an action below.

\* Action: Request For Approval ?

\* Recipient(s): **Crafting, John**

## 73. Identify an Approver

In the **Recipients** field, select one or more individuals who have the authority to approve the filing.

**Tip** To select multiple recipients, press and hold the **[Ctrl]** key while clicking on each name.

**Tip** This action indicates your request for approval and forwards the filing to the authorized individual(s).

# How to File a Written Allegation of Delinquency

## 74. Click **SUBMIT**

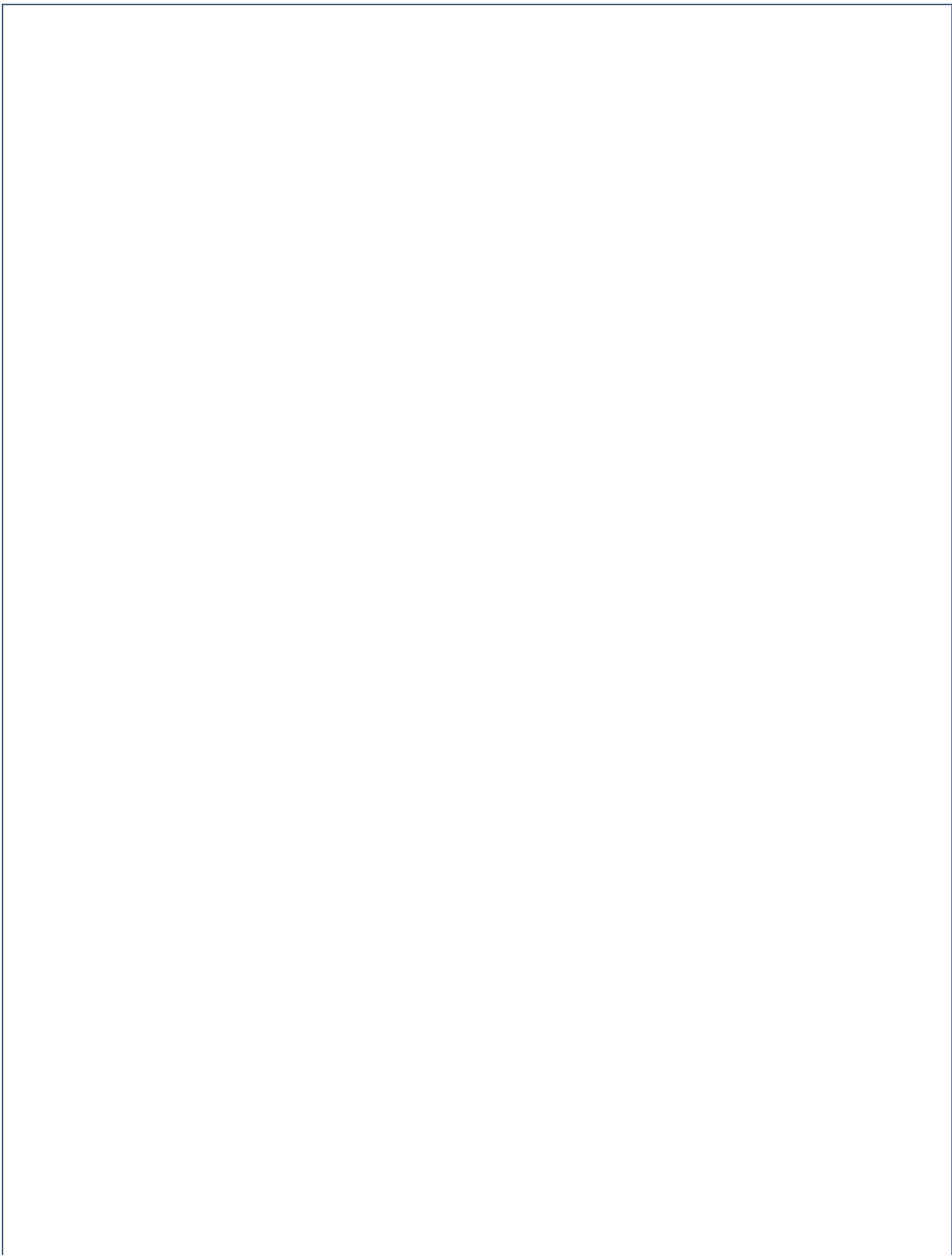
This initiates the selected action.

The screenshot shows a web interface for filing a written allegation. A table titled 'Package Information' contains one row with the following data:

Invoice	Description	Filing Type	Filing Name(s)	Docket Number	Status	Fees
<input type="checkbox"/>		Initiating	*Written Allegation		Not Submitted	\$0.00
<b>Subtotal:</b>						<b>\$0.00</b>

Below the table, there is a note: "\* indicates primary filing". To the right of this note are two input fields, both containing "\$0.00". At the bottom center of the form is a button labeled "Submit". A black line originates from the "Submit" button and points to the text "74. Click SUBMIT" on the left side of the page.

# Working with Saved Filings





# How to Continue Saved Filings

## 1. Continue, approve, or submit a filing?

On your dashboard, separate grids appear when unsubmitted filings exist in one of three possible statuses (see descriptions at right).

To continue a filing in the Saved Filings tab, complete Step 2 only.

To approve a filing in the Approval Requested tab, complete Step 3 only.

To complete the submission process on one or more of the filings in the Submission Requested tab, proceed to Step 4.

Filings				
Saved Filings (7)		Approval Requested (4)		Submission Requested (1)
This grid displays filings that were saved and discontinued before the wizard				
<input type="checkbox"/>	Description	Filing Type	Filing Name(s)	Docket Num
<input type="checkbox"/>	None entered	Ancillary Filing	*Motion for Finding of Aggravated	CP-67-DP-

**Saved Filings tab** – Displays all unsubmitted filings that were saved and closed by you, a fellow proxy, or the person you are proxying for, prior to completing the Payment and Submission screen. The Payment and Submission screen appears after clicking the VERIFY button in the wizard.

**Approval Requested tab** – Displays any unsubmitted filings that were routed to a supervisory authority for review and approval prior to submission. The filings appearing in this grid are viewable by the person/organization identified as the official filer and their proxies.

**Submission Requested tab** – Displays any unsubmitted filings that were approved by a supervisor and sent to someone else in the proxy relationship for final submission to the court. The filings appearing in this grid are viewable by the person/organization identified as the official filer and their proxies.

## 2. Open the saved filing

Identify the filing that you want to complete and click on the corresponding View/Edit icon.

**Tip** The filing opens in the PACFile wizard. For more detailed steps on working with the wizard, use the appropriate reference guide on creating a new case or an existing case filing.

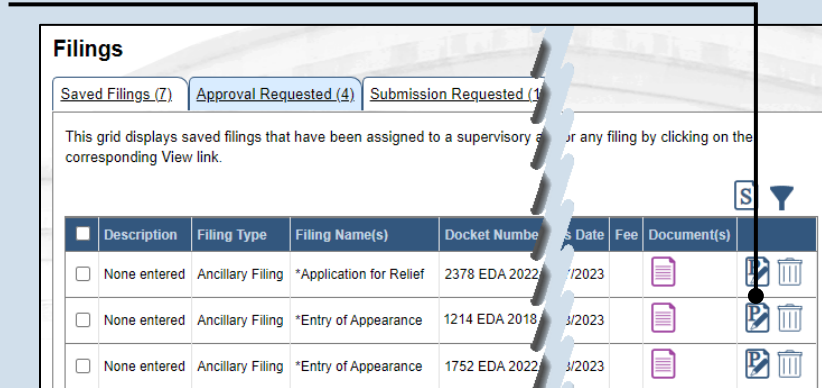
Filings							
Saved Filings (7)		Approval Requested (4)		Submission Requested (1)			
This grid displays filings that were saved and discontinued before the wizard the filing process.							
<input type="checkbox"/>	Description	Filing Type	Filing Name(s)	Docket Num	Date	Fee	Document(s)
<input type="checkbox"/>	None entered	Ancillary Filing	*Motion for Modification of Bail	CP-02-CR-0006959-2023	/2023		
<input type="checkbox"/>	None entered	Initiating Filing	*Petition for Allowance of Appeal	100 WDA 2023	/2023		
<input type="checkbox"/>	None entered	Initiating Filing	*Petition for Allowance of Appeal	1410 EDA 2023	/2023		

# How to Continue Saved Filings

### 3. Open the approval requested filing

Identify the filing that you want to approve and click on the corresponding View/Edit icon.

**Tip:** The filing opens in the PACFile wizard. Refer to the *How to Approve a Filing* reference guide for help on completing that process. Begin with Step 4.



### 4. Identify the approved filings

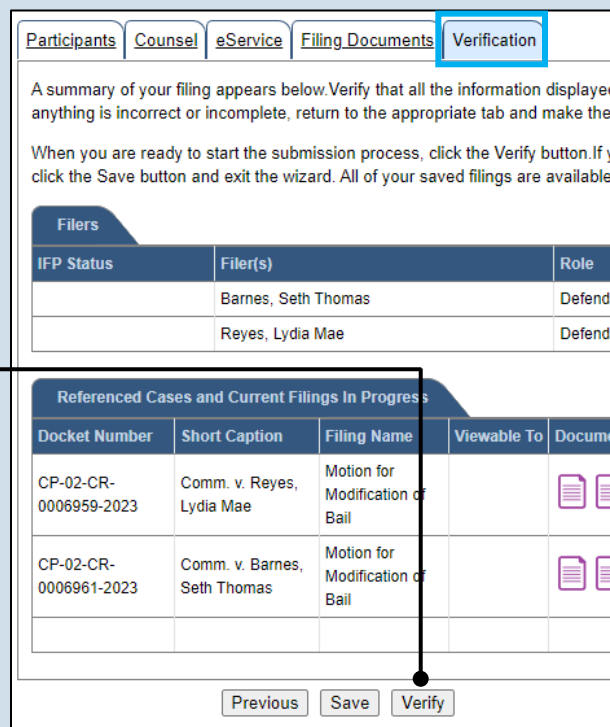
Identify the approved filing that you want to submit to the court by clicking the corresponding View/Edit icon.



### 5. Verify the filing

In the Verification tab of the PACFile wizard, click the VERIFY button.

**Tip:** Clicking VERIFY confirms that you want to initiate the submission process.



## 6. Certify the filing

In the Payment and Submission screen, select the checkbox that signifies that the filing complies with the provisions of the Public Access Policy.

**Tip** You can locate the Public Access Policy at the following web address:

<http://www.pacourts.us/public-records/public-records-forms>

## 8. Click SUBMIT

This initiates the selected verification action.

**PACFile® - Payment and Submission**

The filing(s) you have prepared is ready for submission. Select the appropriate verification action and either acknowledge your aut the appropriate routing information.

Any applicable eService is performed immediately following submission to the court.

**Public Access Policy Certification**

I certify that this filing complies with the provisions of the Case Records Public Access Policy of the Unified Judicial System of Pen confidential information and documents differently than non-confidential information and documents.

\* Certify:

Choose an action below.

\* Action: **Submit to Court**

Notes:

Package Information								
Invoice	Description	Filing Type	Filing Name(s)	Docket Number(s)	Document(s)	Filer(s)	Created By	Tracking Number
<input type="checkbox"/>		Ancillary	*Motion for Modification of Bail	CP-02-CR-0006959-2023 CP-02-CR-0006961-2023		Reyes, Lydia Mae Barnes, Seth Thomas	James, Sherman L	WCP0502C200000560

\* indicates primary filing

Total Invoiced: \$0.  
Total Due Today: \$0.

**Submit**

## 7. Select the verification action

Select 'Submit to Court' from the **Action** dropdown.

**Tip** If the filing carries a fee, refer to the *How to Submit a Filing with a Fee and Make a Payment* reference guide for the remainder of this process. Begin with Step 5.

# How to Approve, Submit, or Return a Filing

## 1. Access filings needing approval

Click on the Approval Requested tab on your dashboard and locate the case that needs approval.

	Description	Filing Type	Filing Name(s)	Document(s)	Date	Fee	Document(s)	
<input type="checkbox"/>	None entered	Initiating Filing	*Dependency Petition	Ba...	4/2023	\$0.00		
<input type="checkbox"/>	None entered	Ancillary Filing	*Motion for Continuance	CP-...	5/2023	\$0.00		
<input type="checkbox"/>	None entered	Ancillary Filing	*Entry of Appearance	CP-...	6/2023	\$0.00		

2. Open the filing  
Click the View/Edit icon in the grid for the filing that needs to be approved. The Case eFiling page opens

## 3. Review the filing

Review the filing by browsing through each of the wizard tabs and making any necessary changes.

**Tip** Alternatively, if changes are required, the filing can also be returned to the creator for revision using the Return for Correction process (Step 6).

Based on the filing type selected in the Filing Type tab, the corresponding document(s) that must be filed are listed below.

You must upload at least one electronic file for each required document. Before uploading, expand the additional section below the grid, to view the electronic filing requirements. To upload an electronic document, click the Upload icon that appears on the filing row.

It is possible to add other filing types that are not listed below. Click the Add Optional Filing icon to select a filing type to include in your submission and to upload the electronic document.

Show information for: ALL

Filing Type(s)	Filing	Is Included	Document(s)
	Motion for Extension of Time	✓	
	Proof of Service	✓	

Disclaimer: I certify that this filing complies with the Case Records Public Access Policy of the Unified Judicial System of Pennsylvania.

Specifically, I understand that financial source documents, minors' educational records, medical/psychological and Youth Services' records, marital property inventory and pre-trial statement provided in Pa.R.C.P. 1920.33, expense statement provided in Pa.R.C.P. 1910.27(c), and agreements between parties as used in 23 Pa.C.S. filed under the Confidential Document Form cover sheet. See Section 8.0 of the Policy for more information.

Furthermore, I understand that the attachments, except for a Confidential Information Form, shall not contain a social security numbers, financial account numbers (except for the last four digits when an active financial account of the case and cannot otherwise be identified), driver license numbers, state identification numbers, minor's name at birth (except when the minor is charged as a defendant in a criminal matter), or any abuse victim address and phone number as defined in Pa.R.C.P. 1931(a), except for the victim's name. See Section 7.0 of the Policy for more information.

I acknowledge the foregoing Disclaimer

[View Additional Info](#)

Previous Next Save **Verify**

4. Verify the filing  
Click the VERIFY button. Complete this action regardless of your intent to approve, submit, or return for correction.

## 5. Certify the filing

In the Payment and Submission screen, select the checkbox that signifies that the filing complies with the provisions of the Public Access Policy.

**Tip** You can locate the Public Access Policy at the following web address:

<http://www.pacourts.us/public-records/public-records-forms>

PACFile® - Payment and Submission

The filing(s) you have prepared is ready for submission. Select the appropriate verification action and either acknowledge the appropriate routing information.

Any applicable eService is performed immediately following submission to the court.

Public Access Policy Certification

I certify that this filing complies with the provisions of the Case Records Public Access Policy of the Unified Judicial System of Pennsylvania. Confidential information and documents differently than non-confidential information and documents.

\* Certify:

Choose an action below.

\* Action: [Submit to Court] [?]

\* Recipient(s): [Returned For Correction, Request For Submission, Submit to Court]

When you select an action other than 'Submit to Court', this optional field can be used to communicate relevant information. Any text you enter will not be submitted to or seen by the court.

Notes: [Text Area]

Package Information

Invoice	Description	Filing Type	Filing Name(s)	Docket Number(s)	Document(s)	Filer(s)	Created	Fee
---------	-------------	-------------	----------------	------------------	-------------	----------	---------	-----

## 6. Choose an action

Select one of the following options from the **Action** field and proceed to the corresponding step:

- 'Request for Submission' – Step 7.
- 'Return for Correction' – Step 8.
- 'Submit to Court' – Step 10.

**Tip** Depending on your proxy rights, you may not be able to use all of these options.

## 7. Identify a submitter

In the **Recipient(s)** field, select one or more of the individuals listed who have the authority to submit the filing to the court. Proceed to Step 10.

**Tip** This action indicates your approval and forwards the filing to the specified individual(s) for final submission.

PACFile® - Payment and Submission

The filing(s) you have prepared is ready for submission. Select the appropriate verification action and either acknowledge the appropriate routing information.

Any applicable eService is performed immediately following submission to the court.

Public Access Policy Certification

I certify that this filing complies with the provisions of the Case Records Public Access Policy of the Unified Judicial System of Pennsylvania. Confidential information and documents differently than non-confidential information and documents.

\* Certify:

Choose an action below.

\* Action: [Request For Submission] [?]

\* Recipient(s): [Crafting, Johnnn]

When you select an action other than 'Submit to Court', this optional field can be used to communicate relevant information. Any text you enter will not be submitted to or seen by the court.

Notes: [Text Area]

# How to Approve, Submit, or Return a Filing

## 8. Select a recipient

In the **Recipient(s)** field, select the individual that created the filing.

**PACFile® - Payment and Submission**

The filing(s) you have prepared is ready for submission. Select the appropriate verification action and either acknowledge your authority or the appropriate routing information.

Any applicable eService is performed immediately following submission to the court.

**Public Access Policy Certification**

I certify that this filing complies with the provisions of the Case Records Public Access Policy of the Unified Judicial System of Pennsylvania regarding confidential information and documents differently than non-confidential information and documents.

\* Certify:

Choose an action below.

\* Action: Returned For Correction

\* Recipient(s): Sherman, James

When you select an action other than 'Submit to Court', this optional field can be used to communicate relevant information to the designated recipient. The text you enter will not be submitted to or seen by the court.

Notes: The filing contains several errors that need to be corrected. Please refer to the list below:  
1. The guardian's name is misspelled for the cover page.

## 9. Enter notes

In the **Notes** field, explain why the filing needs to be corrected and cannot be approved.

**Tip** These notes are transmitted to the selected recipient.

## 10. Click SUBMIT

The filing is sent to the appropriate PACFile user or the court depending on the selected action.

**PACFile® - Payment and Submission**

The filing(s) you have prepared is ready for submission. Select the appropriate verification action and either acknowledge your authority or the appropriate routing information.

Any applicable eService is performed immediately following submission to the court.

**Public Access Policy Certification**

I certify that this filing complies with the provisions of the Case Records Public Access Policy of the Unified Judicial System of Pennsylvania regarding confidential information and documents differently than non-confidential information and documents.

\* Certify:

Choose an action below.

\* Action: Submit to Court

When you select an action other than 'Submit to Court', this optional field can be used to communicate relevant information to the designated recipient. The text you enter will not be submitted to or seen by the court.

Notes:

Package Information									
Invoice	Description	Filing Type	Filing Name(s)	Docket Number(s)	Document(s)	Filer(s)	Created By	Tracking Number	Status
<input type="checkbox"/>		Ancillary	*Motion for Extension of Time	CP-02-CR-0006959-2023 CP-02-CR-0006961-2023		Reyes, Lydia Mae Barnes, Seth Thomas	James, Sherman L	WCP0502C20000	Not Submitted

\* indicates primary filing






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



**Submit**





# How to Correct and/or Submit an Approved Filing

## 1. Access the filing

In the Notification section of your Dashboard, locate the 'Filing Returned for Correction' or 'Filing Ready for Submission' notification and click the View icon.

Notifications			
Category ?	Notification Type	Subject	Info
<input type="checkbox"/> User Action Required	Filing Returned for Correction	"Motion for Extension of Time" returned for correction (CP-02-CR-0006959-2023)	    

**Tip** If comments were included by the person who sent the filing to you, this can be determined by the presence of the Comment icon . Click the View Notification icon  to read the comments. The same comments also appear in the corresponding e-mail notification.

Participants	Counsel	Service	Filing Documents	Verification			
A summary of your filing appears below. Verify that all the information displayed is complete. If anything is incorrect or incomplete, return to the appropriate tab and make the necessary corrections.							
When you are ready to start the submission process, click the Verify button. If you are not ready at this time, click the Save button and exit the wizard. All of your saved filings are available on your dashboard.							
Filers							
IFP Status	Filer(s)	Role					
	Barnes, Seth Thomas	Defendant					
	Reyes, Lydia Mae	Defendant					
Referenced Cases and Current Filings In Progress							
Docket Number	Short Caption	Filing Name	Viewable To	Document(s)	Filed	Filing Fee	
CP-02-CR-0006959-2023	Comm. v. Reyes, Lydia Mae	Motion for Extension of Time		 		\$0.00	
CP-02-CR-0006961-2023	Comm. v. Barnes, Seth Thomas	Motion for Extension of Time		 		\$0.00	
						\$0.00	
					Previous	Save	Verify

## 3. Click the VERIFY button

## 2. (Optional) Update the filing

If the filing needs to be corrected, navigate through each of the wizard tabs and make the appropriate updates based on the comments from the approving authority.

**Tip** For more detailed steps on working with the wizard, use the appropriate reference guide on creating a new case or an existing case filing.

# How to Correct and/or Submit an Approved Filing

## 4. Certify the filing

Select the checkbox that signifies that the filing complies with the provisions of the Public Access Policy.

**Tip:** You can locate the Public Access Policy at the following web address:

<http://www.pacourts.us/public-records/public-records-forms>

PACFile® - Payment and Submission

The filing(s) you have prepared is ready for submission. Select the appropriate verification action for filing or complete the appropriate routing information.

Any applicable eService is performed immediately following submission to the court.

Public Access Policy Certification

I certify that this filing complies with the provisions of the Case Records Public Access Policy of the court. I require filing confidential information and documents differently than non-confidential information and documents.

\* Certify:

Choose an action below.

\* Action: Request For Approval

\* Recipient(s): Request For Approval, Submit to Court

When you select an action other than 'Submit to Court', this optional field can be used to communicate the content of the filing. Any text you enter will not be submitted to or seen by the court.

Notes:

## 5. Choose an action

Select one of the following verification options from the **Action** field and proceed to the corresponding step:

- 'Request for Approval' – Select if the filing was returned for correction and needs to be approved. Continue to Step 6.
- 'Submit to Court' – Select if the filing is ready to be submitted. Proceed to Step 7.

## 6. Identify an approver

In the **Recipients** field, select one or more individuals who have the authority to approve the filing.

**Tip:** To select multiple recipients, press and hold the **[Ctrl]** key while clicking on each name.

**Tip:** This action indicates your request for approval and forwards the filing to the authorized individual(s).

PACFile® - Payment and Submission

The filing(s) you have prepared is ready for submission. Select the appropriate verification action for filing or complete the appropriate routing information.

Any applicable eService is performed immediately following submission to the court.

Public Access Policy Certification

I certify that this filing complies with the provisions of the Case Records Public Access Policy of the court. I require filing confidential information and documents differently than non-confidential information and documents.

\* Certify:

Choose an action below.

\* Action: Request For Approval

\* Recipient(s): Crafting, John Walker, Michael

**Tip:** If you are submitting the filing, and it carries a fee, proceed to the *How to Submit a Filing with a Fee and Make a Payment* reference guide for the remainder of this process. Begin with Step 5.

Invoice	Description	Filing Type	Filing Name(s)	Docket Number	Status	Fee
<input type="checkbox"/>		Ancillary	*Motion for Extension of Time	CP-02-CR-0006959-2023 CP-02-CR-0006961-2023	Not Submitted	\$0.00
Subtotal:						\$0.00

\* indicates primary filing

Amount: \$0.00  
Today: \$0.00

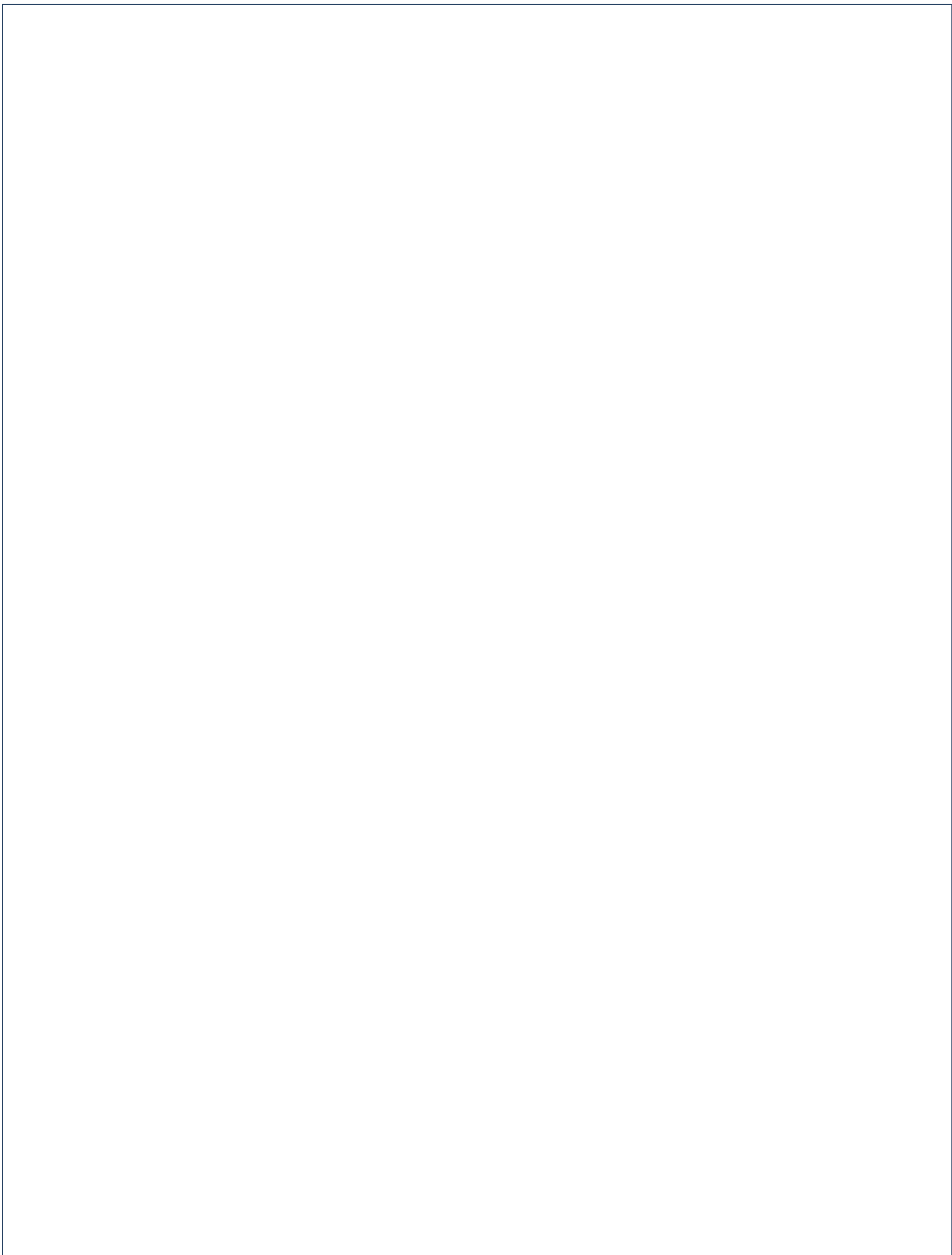
Submit

## 7. Click SUBMIT

This initiates the selected verification action.



Proxying



# How to Request Proxy Rights

## 1. Open the My Profile screen

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



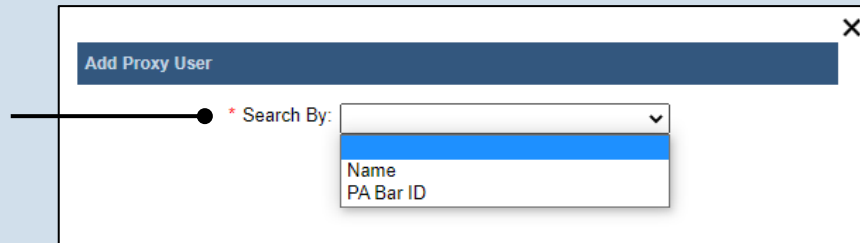
## 2. Click the Add New Record icon

In the My Profile screen, this button appears above the People I Can Proxy For grid.



## 3. Select a Search Type

In the Add Proxy User screen, you have two ways to search for the individual for whom you are requesting proxy rights. 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 that have a registered PACFile account.

## 5. Click SEARCH

### Searching By Name

A screenshot of the 'Add Proxy User' form with search criteria for Name. The 'Search By' dropdown is set to 'Name'. The form fields are: Last Name: Joseph, First Name: Blake, City: Harrisburg, and State: Pennsylvania. A 'Search' button is at the bottom.

### Searching By Bar Number

A screenshot of the 'Add Proxy User' form with search criteria for PA Bar ID. The 'Search By' dropdown is set to 'PA Bar ID'. The form field is: PA Bar Number: 900020. A 'Search' button is at the bottom.

## 4. Enter your search criteria

Depending on the selected search type, enter the required information related to the individual for whom you are requesting proxy rights.

## 6. Confirm the individual

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

Account Name	User Name	Email Address	Location	PA Bar Number
<input checked="" type="checkbox"/> bljoseph	Joseph, Blake	900020@test.ars	Harrisburg, PA	900020

## 7. Click SUBMIT

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

**Tip** A PACFile notification will now be sent to the individual you identified. They must approve your request and assign you specific permissions before you can begin to act as their proxy.

# How to Assign Proxy Rights from a Request

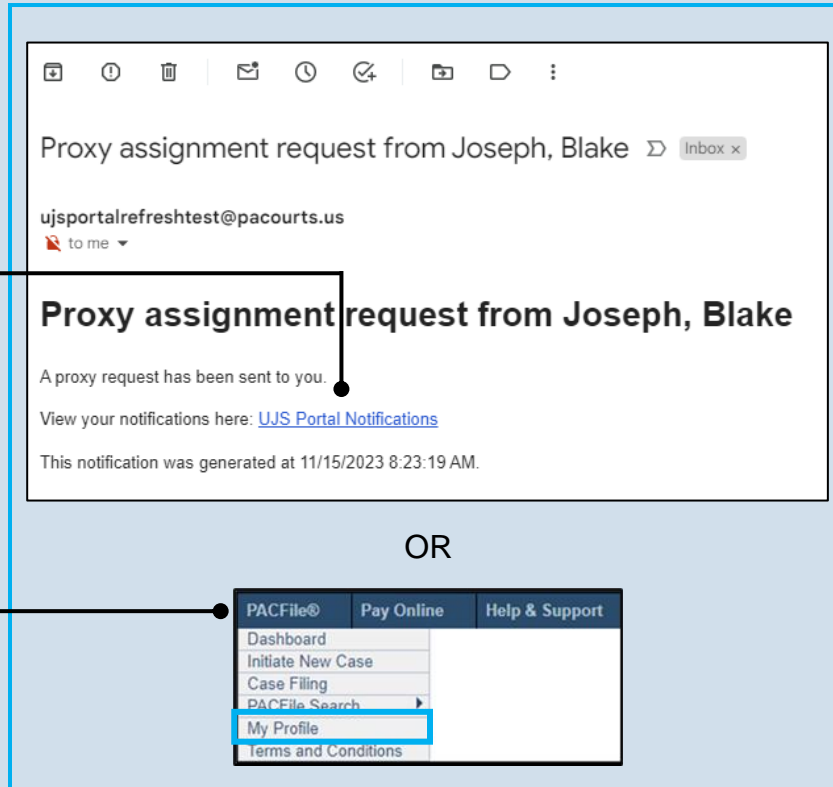
## 1. Open the My Profile screen

Complete one of the following to open the My Profile screen:

- a. If you receive an e-mail notification regarding a proxy request, click on the link within the e-mail and log into PACFile.

OR

- b. If you are logged into PACFile, hover your mouse pointer over the PACFile menu and click on 'My Profile.'



## 2. Assign proxy permissions

In the My Proxies grid of the My Profile screen, locate the individual and click the Approve user's request icon.

## 3. Access proxy permissions

Click the Edit User Proxy Rights icon.



# How to Assign Proxy Rights from a Request

## 4. Assign proxy permissions

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

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

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

<input type="checkbox"/>	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

## 5. Click SUBMIT

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

## 6. Access proxy notifications

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

## 7. 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).

## 8. Click SUBMIT

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

<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

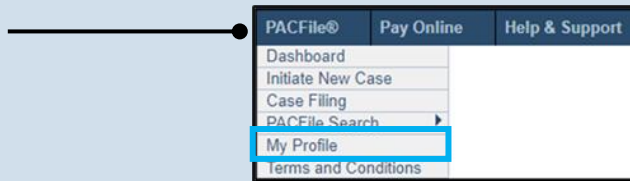
## ➤ Proxy Right Definitions

- **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.

# How to Assign Proxy Rights without a Request

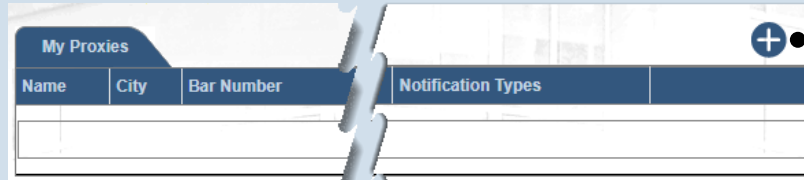
## 1. Open the My Profile screen

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



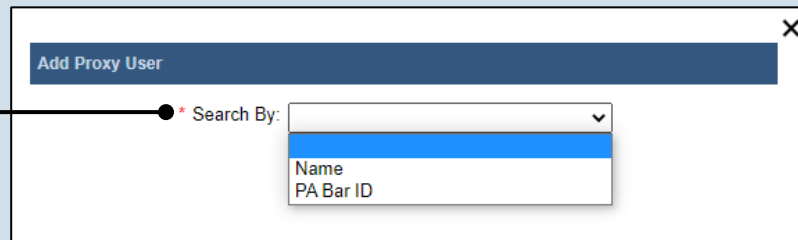
## 2. Click the Add New Record icon

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

**Searching By Name**

Add Proxy User

\* Search By: Name

\* Last Name: Joseph

\* First Name: Blake

\* City: Harrisburg

\* State: Pennsylvania

Search

**Searching By Bar Number**

Add Proxy User

\* Search By: PA Bar ID

\* PA Bar Number: 900020

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	[P] [N] [trash]

## 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

## 10. Click SUBMIT

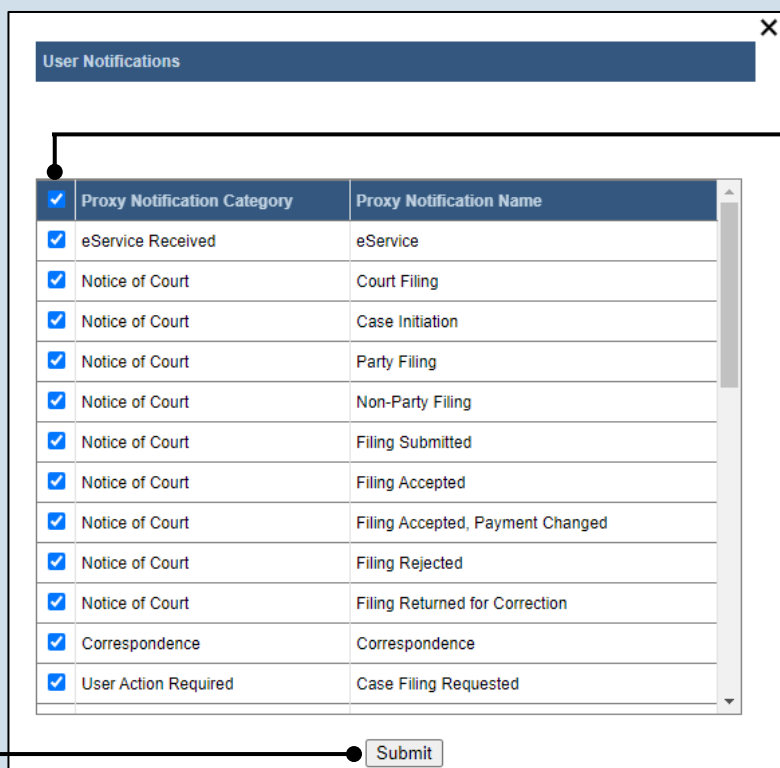
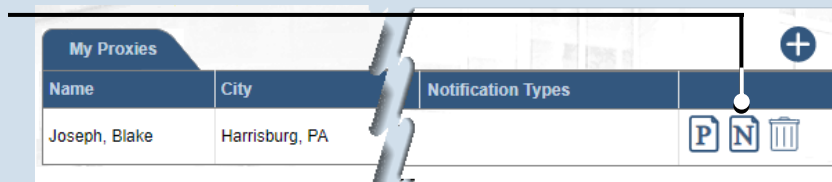
If a popup appears indicating that your changes have been saved, click the OK button.

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

# 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.



## 13. Click SUBMIT

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

## 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).

## ➤ 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.

# Person-to-Person Proxy Notification Types



## ➤ Using this Guide

These definitions apply to individuals who are assigning their notification proxy rights to another person. When a proxy is granted access to a notification type, they receive a duplicate copy of any of the corresponding notifications sent to you.

### eService

**eService** - Notifications regarding the receipt of electronic service on a case where you are identified as a service recipient.

### Notice of Court

**Case Initiation** – (Common Pleas cases) A courtesy copy of an eService notification related to a new case filing that has been docketed by the court on one of your cases. These are limited to specific recipient groups, which vary by docket type, that are considered interested parties but are not designated as service recipients. These notifications are not available for the Juvenile docket.

(Appellate Court Cases)  
Notifications regarding any new cases that were paper-filed with the court where you are listed as a case participant and the court has made the document available electronically. This is not considered a form of eService.

**Court Filing** – (Common Pleas cases) A courtesy copy of an eService notification related to a document that has been filed by the court on one of your cases. These are limited to specific recipient groups, which vary by docket type, that are considered interested parties but are not designated as service recipients.

(Appellate Court cases)  
eService-related notifications regarding the court orders that are issued on your cases when you are acting in a third or non-party role (ex. Amicus, Intervenor).

**Filing Accepted** – Notifications from the court confirming that a PACFiling submitted on your behalf, by you or a proxy, has been accepted and docketed.

**Filing Accepted, Payment Changed** - Notifications signifying that a PACFiling submitted by you, or your proxy, was accepted, but the filing name was incorrect. The court corrected the filing name and it resulted in a lower fee amount. Payment is accepted for the lower amount and no additional action is required.

**Filing Submitted** – Notifications from the court confirming that a PACFiling submitted on your behalf, by you or a proxy, has been received.

**Non-Party Filing** – (Common Pleas cases) A courtesy copy of an eService notification related to a filing on one of your existing cases, which has been submitted by a filer that cannot be systematically determined. These notifications are very rare. These are limited to specific recipient groups, which vary by docket type, that are considered

interested parties but are not designated as service recipients.

(Appellate Court cases)  
Notifications from the court confirming that a paper filing has been submitted on one of your active cases by someone in a third or non-party role (ex. Amicus). This is not considered a form of eService.

**Party Filing** – (Common Pleas cases) A courtesy copy of an eService notification related to a filing on one of your existing cases that has been submitted by another case participant or the attorney of a case participant. These are limited to specific recipient groups, which vary by docket type, that are considered interested parties but are not designated as service recipients.

(Appellate Court cases)  
Notifications from the court confirming that a paper filing has been submitted on one of your active cases by another participant. This is not considered a form of eService.

### Correspondence

**Correspondence** – (Appellate Courts only) Notifications signifying any formal communications from the court, other than orders, that have been sent to you on any of your applicable cases.

## User Action Required

### Calendar Access Request

**Approved** – These notifications are not applicable to person-to-person proxy relationships.

### Calendar Access Request

**Denied** – These notifications are not applicable to person-to-person proxy relationships.

### Calendar Access Request

**Pending** – These notifications are not applicable to person-to-person proxy relationships.

### Calendar Access Request

**Revoked** – These notifications are not applicable to person-to-person proxy relationships.

### Case Filing Requested

– Notifications that signify an instance in which a court is requesting a document from you. These notifications only apply to docketing statement recipients on Superior Court cases and to court users who receive case record requests from an Appellate court.

### Filing Accepted, Docket Type

**Changed** – Notifications informing you that the court has docketed your PACFiling on a docket type other than one you specified. This change may require some corrective action.

### Filing Accepted, Payment Due

– Notifications signifying that a PACFiling submitted by you, or your proxy, was accepted, but one of the following occurred: (a) the filing name selected was incorrect and the court-corrected name carries a higher fee or (b) the filing has a variable fee that could only be determined by the court upon submission. In either case, no payment was taken when the filing was

accepted so it must be submitted for the outstanding fee.

### Filing Accepted, Payment

**Failed** – Notifications signifying that a PACFiling submitted by you, or your proxy, was accepted, but the credit card payment failed. This could have been caused by entering incorrect billing information, using an invalid card, or having insufficient credit based on the card's established limits. Payment must be resubmitted for the outstanding fee.

### Filing Approval Request

**Cancelled** – These notifications are not applicable to person-to-person proxy relationships.

### Filing Not Submitted

– Notifications reminding you that 24 hours have elapsed since a PACFiling was created on your behalf that remains unsubmitted.

### Filing Payment Failure

– Notifications where the PACFile submission process could not be completed because there was a problem during checkout.

### Filing Ready for Review

– These notifications are not applicable to person-to-person proxy relationships.

### Filing Ready for Submission

– These notifications are not applicable to person-to-person proxy relationships.

### Filing Rejected

– Notifications indicating that the court has refused to accept a filing submitted on your behalf due to some significant defect.

### Filing Returned for Correction

– These notifications are not applicable to person-to-person proxy relationships.

## Saved Filing Removal Notice -

Notifications that indicate you have a saved filing that has not been updated in the last 60 days and it will be deleted if not updated within the next 30 days.

## Proxy Requests

**Proxy Request** – Notifications representing requests from other individuals to act on your behalf in PACFile. The proxy must also have the 'Administer Proxies' privilege as part of their relationship to you.

### Proxy Request Accepted

– These notifications are not applicable to person-to-person proxy relationships.

### Proxy Request Rejected

– These notifications are not applicable to person-to-person proxy relationships.

## Administrative

### Case Access Code Changed

– Notifications informing you that the court has changed the access code used by some participants to access case information in PACFile. This change might be necessary if a code ever becomes compromised.

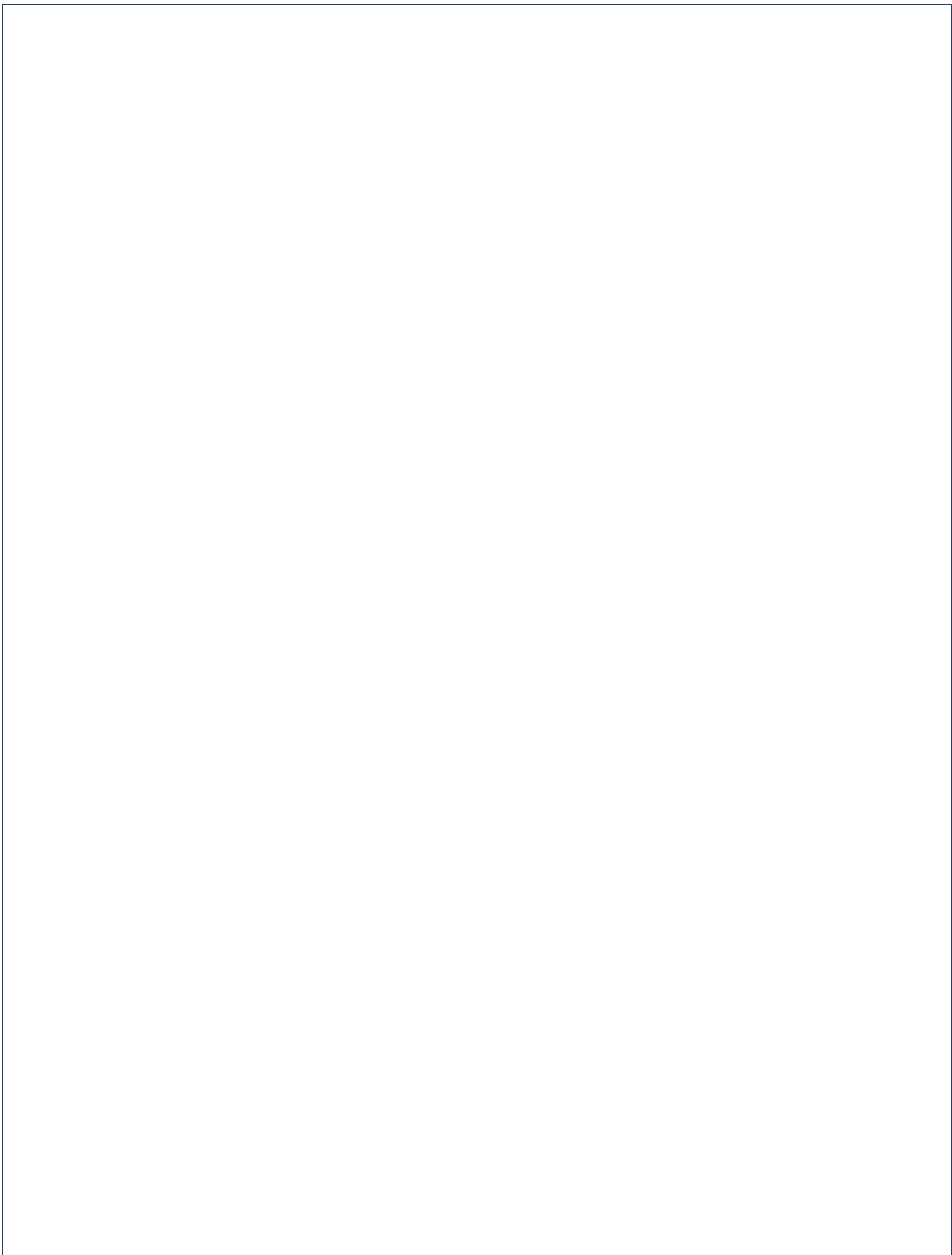
### Case User Access Changed

– Notifications informing you that the court has somehow changed your ability to utilize PACFile for one or more cases in that court. This could pertain to restrictions for eFiling on a case.

### System Maintenance

– Notifications from the AOPC that indicate the UJS Web Portal and/or PACFile will be offline at some future period.

Miscellaneous



# Dashboard Quick Sheet

## ➤ Using this Guide

Match any number below to the same number on the next page to learn more about the corresponding Dashboard feature. Some features are not applicable to all PACFile users.

Welcome to your PACFile® dashboard! ? Help

**Filings**

1 **Saved Filings (0)**   2 **Approval Requested (2)**   3 **Submission Requested (0)**   4 **Submitted For Actions (0)**   5 **Recently Completed (3)**

This grid displays filings that were saved and discontinued before the wizard was completed. Use the View/Edit link next to any filing to open the wizard and continue the filing process.

Description	Filing Type	Filing Name(s)	Docket Number(s)	Filer(s)	Created By	Tracking Number	Status	Status Date	Fee	Document(s)
No results found										

**Notifications**

Category	Notification Type	Subject	Sent	Documents	Other Info
No results found					

**Recent Updates**  
[Latest PACFile News](#)  
 Updated: 12/30/2021

**Actions**  
[Initiate New Case Case Filing](#)

**Search**  
 \* Docket/Tracking Number:

**Case Information**  
[Appellate Court Filings](#)  
[My Cases](#)

**More Actions**  
[Notifications](#)

**What is the PACFile Dashboard?**

This dashboard represents the starting point for submitting, managing, and viewing case-related filings electronically in the Pennsylvania Courts. From here, you have the option to file on new or existing cases, view docketed submissions on existing cases, continue any unfinished filings, and manage your PACFile account settings. PACFile also features a comprehensive notification system that keeps you informed when case-related filings are submitted by other participants and any communications or filings are issued by the court. Whenever you submit a filing through PACFile, an electronic confirmation should be forwarded to you once the court acknowledges its receipt. If you do not receive an electronic confirmation within three business days of submission, please contact the appropriate court office. To get started, perform a search for a case or click on any of the links to the right.

If you have any technical issues or questions about the PACFile website, please visit our [Help Center](#). Any non-technical questions about specific filing matters should be directed to the court.

[Electronic Filing System in the Appellate Courts – Judicial Order](#)

**PACFile®**  
PENNSYLVANIA COURTS

Refer to #6

1. **Saved Filings** – Lists any unsubmitted filings saved by you or your proxy.
2. **Approval Requested** – Lists any unsubmitted filings that have been sent to a supervisory authority for approval.
3. **Submission Requested** – Lists any saved filings that have been approved by a supervisory authority and are awaiting submission to the court.
4. **Submitted for Actions** – Lists any saved filings that have been shared between organizations for review. Not applicable to most individuals.
5. **Recently Completed** – Lists all filings that you, or your proxy, have submitted in the last 15 days.
6. **Notifications** – Communications regarding your cases, eFilings, or PACFile profile, which are separated into the following categories:
 

**Electronic Service** – Lists all notifications for the cases in which you, or the individuals you are proxying for, are participating based on the eFilings submitted by other PACFile-registered attorneys, pro se litigants, or other individuals.

**Notice of Court** – View notifications regarding the submission status of your eFilings, instances where you are a courtesy copy recipient of eService (Common Pleas cases only), and filings that have been submitted on your cases outside of PACFile by other attorneys, pro se litigants, or other eligible individuals (Appellate only).

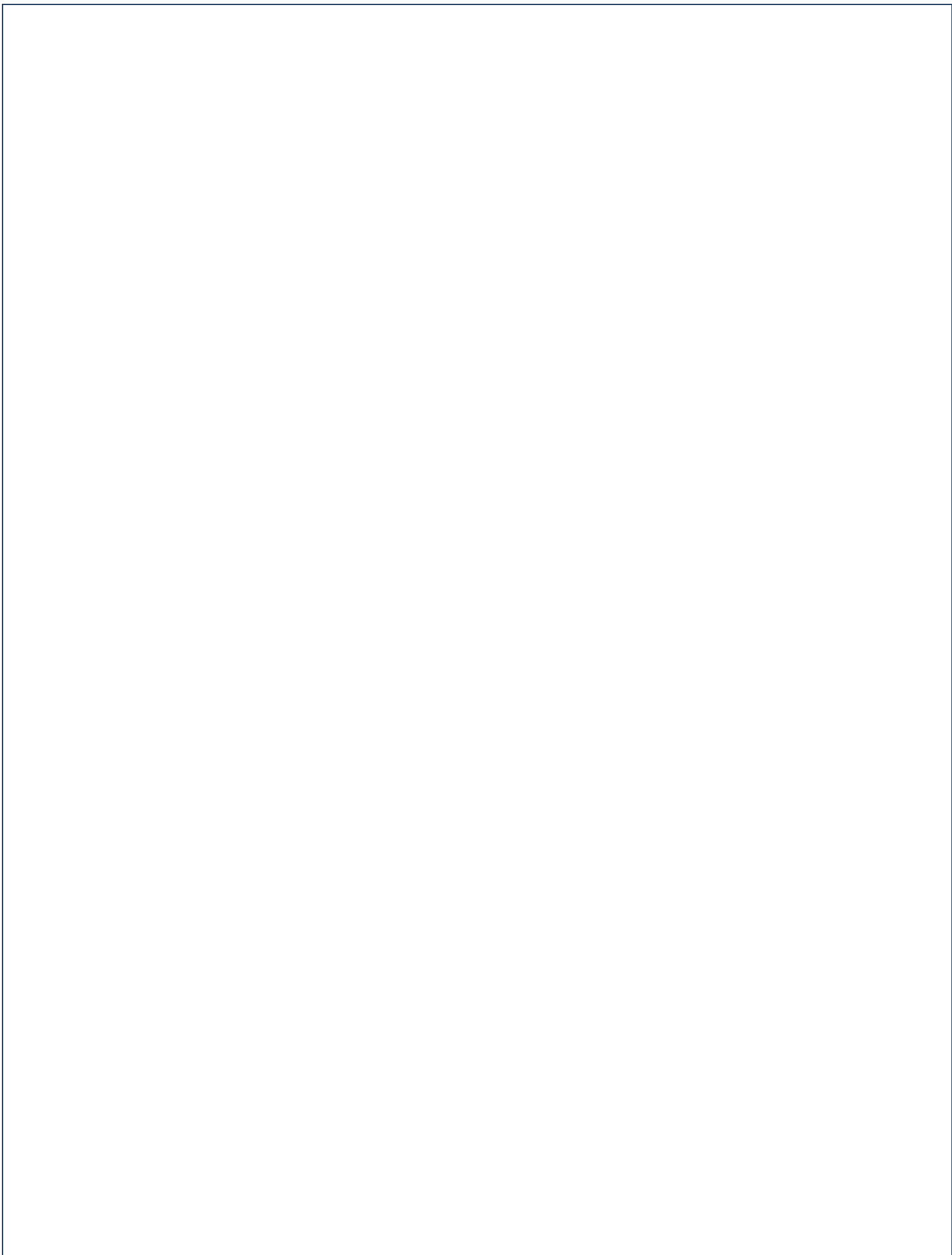
**Correspondence** – View electronic copies of the letters and other communications that an Appellate Court has sent to you regarding your cases. This does not include court orders.

**User Action Required** – View any notifications related to filings transmitted through your approval process hierarchy, instances where the court has found a significant defect with a submitted filing, errors relating to the fee payment process, or court responses to calendar access requests.

**Proxy Requests** – Authorize and grant permissions to individuals who have requested the right to act as your proxy.

**Administrative** – View notifications that define any situation where your ability to access and submit filings electronically has been affected.
7. **Recent Updates** – View the latest PACFile-related news from the Administrative Office of Pennsylvania Courts (AOPC). This information is made available through the PACFile Help System.
8. **Initiate New Case** – Launch the wizard to initiate a new case filing.
9. **Case Filing** – Launch the wizard to create a filing on an existing case.
10. **Docket/Tracking Number** – Search for a case by docket number and view the corresponding case details. Alternatively, search for a PACFiling based on the unique tracking number it is assigned after it was saved or submitted to the court. More information is available when you, or the individuals you are proxying for, are participating on the case.
11. **Case Search** – Provides the option to search for a case by its docket number, filed date, or by a specific agency, attorney, or participant listed on the case.
12. **Case Participant Search** – Search for all cases associated to a specific case participant on which you, or the individuals you are proxying for, are participating.
13. **Calendar Event Search** – Search for court calendar events associated to cases on which you, or the individuals you are proxying for, are participating (ex. hearings, arraignments, sessions, etc.).
14. **Calendar** – View the full case calendar for a specific court or courtroom. Requests to access a calendar are only granted at the discretion of the court.
15. **Appellate Court Filings** – View any court filing from the past 30 days on any appellate court cases (Supreme, Superior, or Commonwealth) where you, or the individuals you are proxying for, are participating.
16. **My Cases** – View a list of cases on which you are actively participating.





# Need Additional Help?

Click the ***Help*** link on any PACFile screen

or

Go to the Help & Support menu and click ***Help Center***

**AOPC**