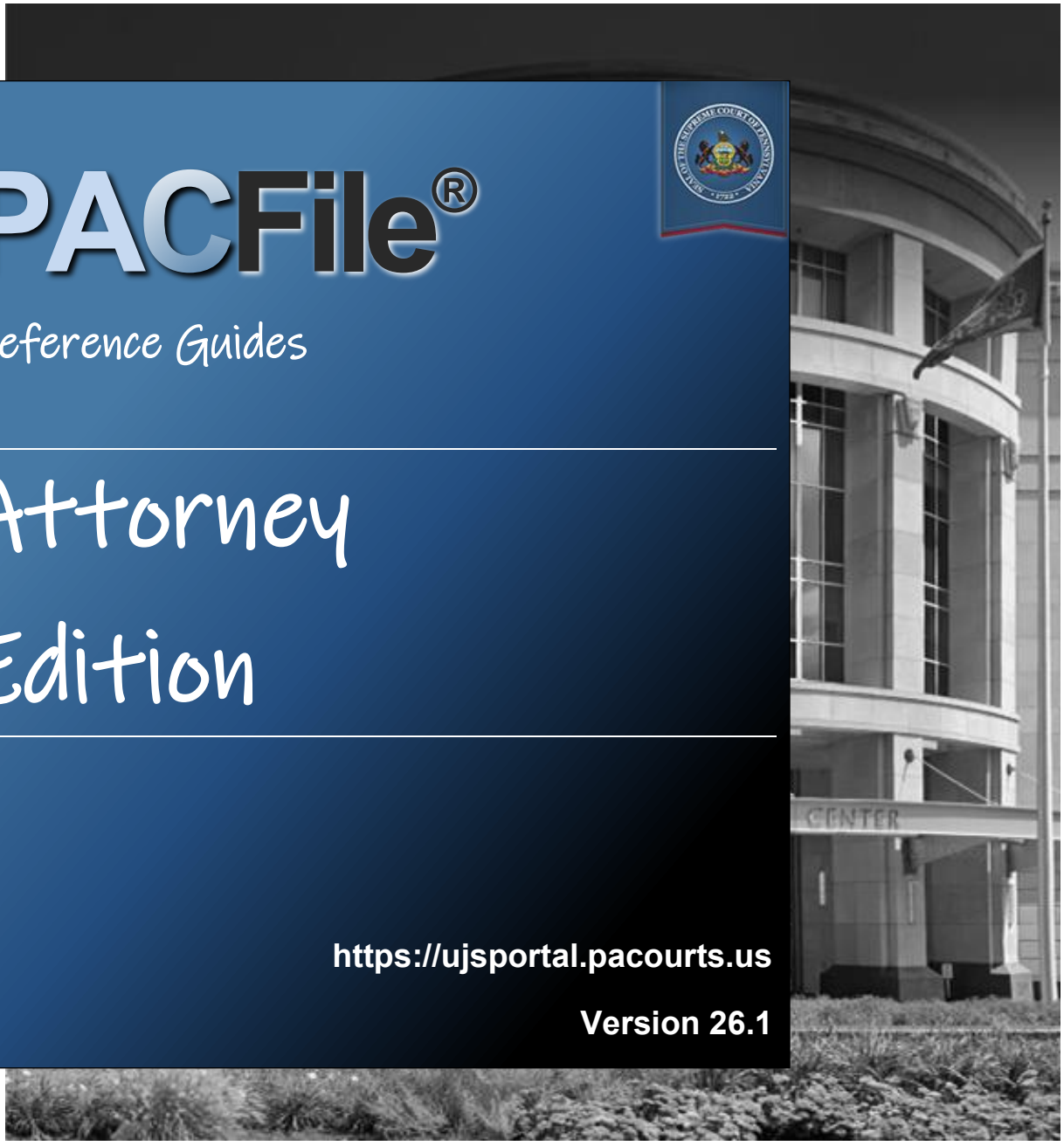
The Unified **JUDICIAL SYSTEM** *of* **PENNSYLVANIA WEB PORTAL**



PACFile®

Reference Guides

Attorney Edition

https://ujsportal.pacourts.us

Version 26.1

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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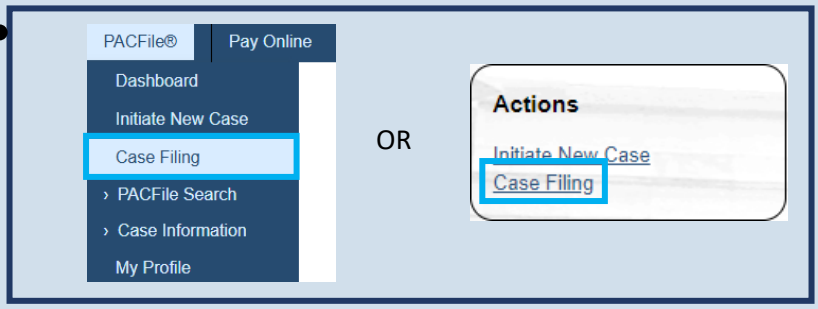
Creating Filings

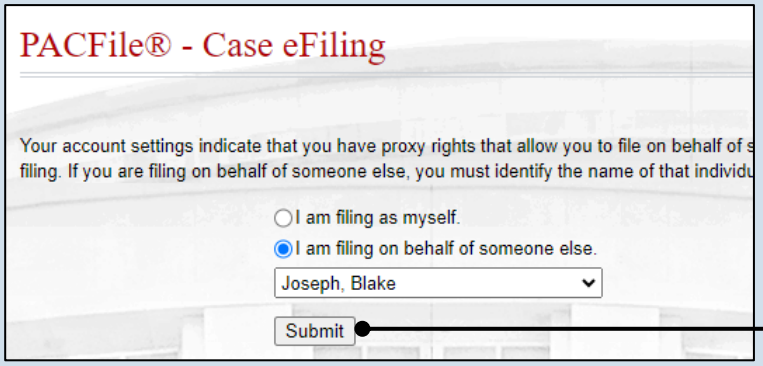
How to File on an Existing Case (Juvenile, Dependency, Other)

PACFile®

1. Open the case filing wizard

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





2. Select your proxy status

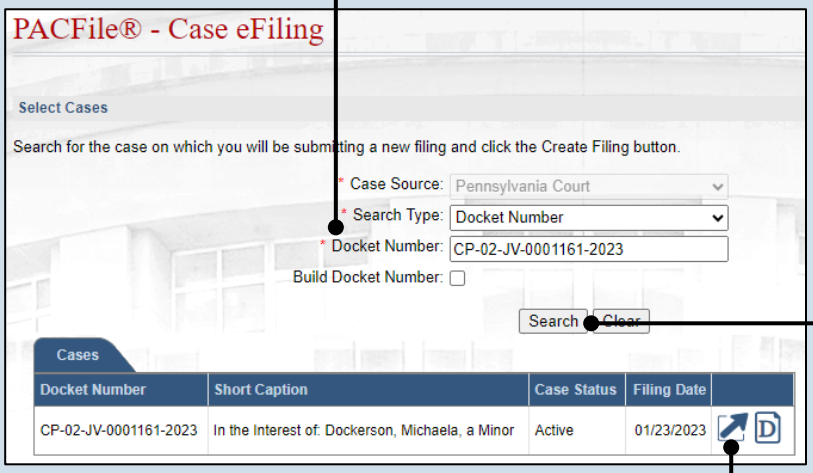
If you have the proxy rights to file on behalf of someone else, you will see the proxy selection screen. Choose between the two options and click SUBMIT.

If you have no proxy rights, you will not see this screen. Continue to Step 3.

3. Identify the case number for the filing

In the Select Cases screen, click in the **Docket Number** field and enter the docket number of case on which you are filing.

Tip If you do not have the exact formatting of the docket number, select the **Build Docket Number** checkbox to use selectable fields to assist in entering the number.



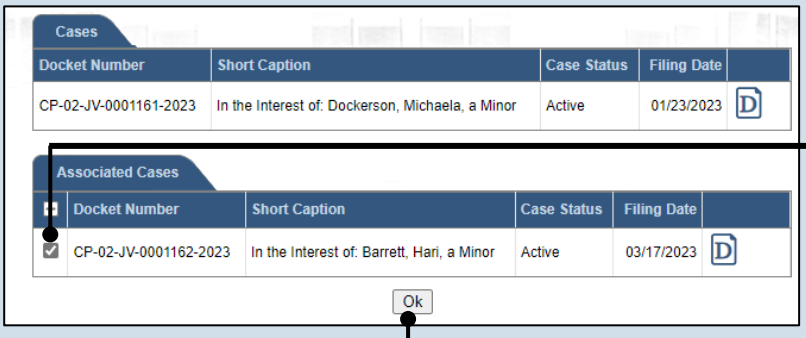
4. Click SEARCH

5. Select the case

Within the search results, click the Select Case icon appearing in the grid.

If this action does not identify any associated cases, proceed to Step 8.

If PACFile identifies associated cases, continue to Step 6.



6. Specify any associated cases

When there are other cases associated with the one you identified in Step 5, they will appear below. Select the checkbox for each case to which the new filing applies.

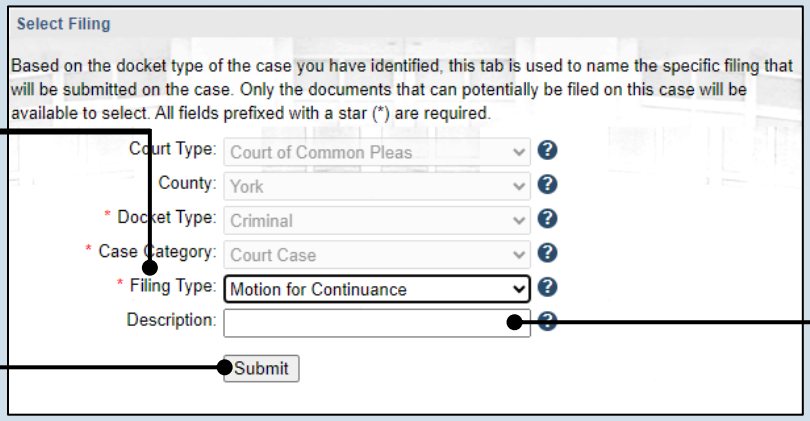
7. Click OK

How to File on an Existing Case (Juvenile, Dependency, Other)

PACFile®

8. Select a filing type

In the Select Filing screen, click the **Filing Type** dropdown, select the type of document you are filing.

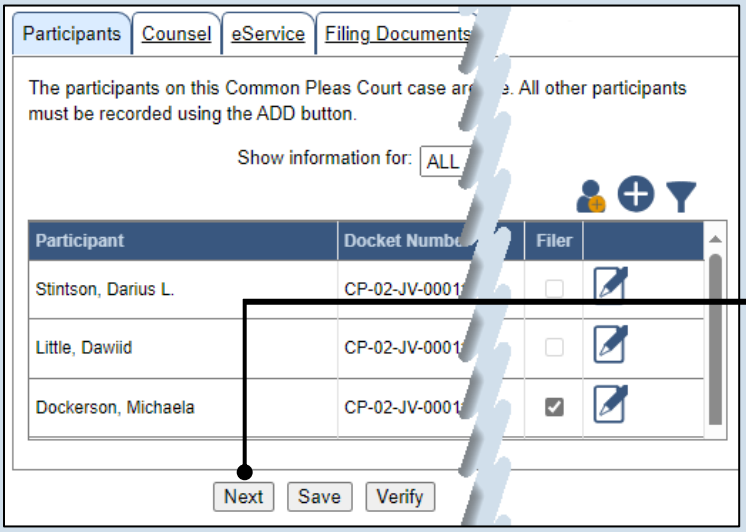


9. (Optional) Enter a description

Enter any word or phrase that will help identify your new case more conveniently through your PACFile dashboard.

Tip Anything you enter here will only be visible to you. The filing office will never see this information.

10. Click SUBMIT

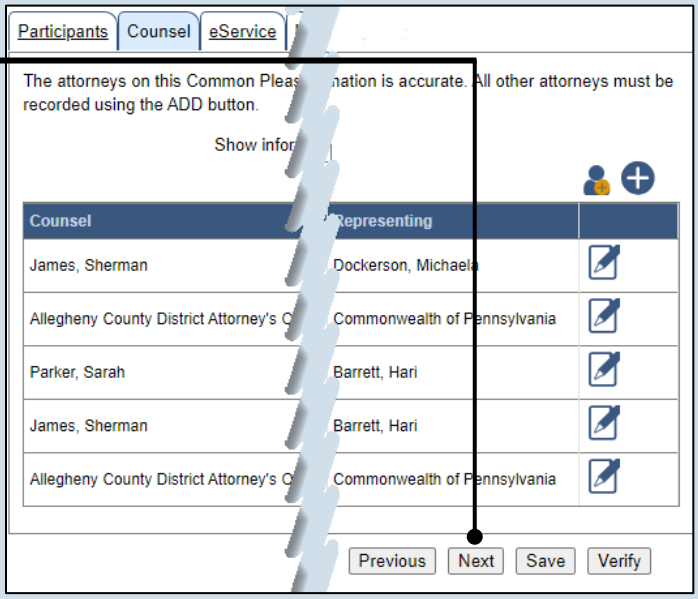


11. Bypass the Participants tab

In the Participant tab, click NEXT.

12. Bypass the Counsel tab

In the Counsel tab, click NEXT.



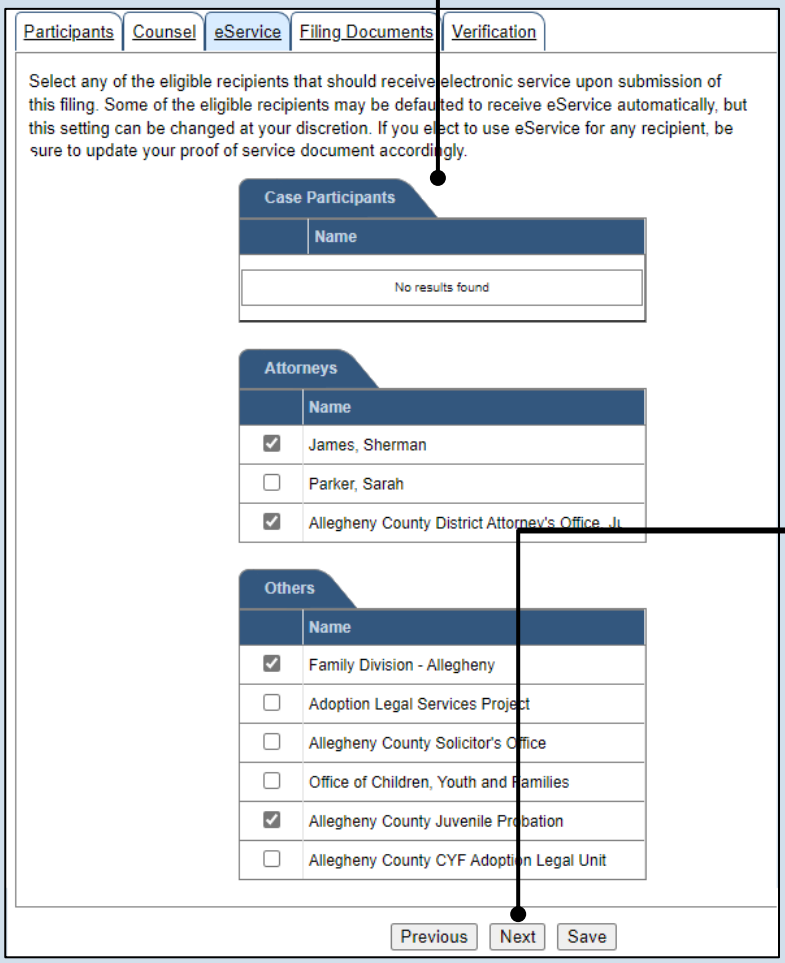
How to File on an Existing Case (Juvenile, Dependency, Other)

PACFile®

13. Identify eService recipients

In the eService tab, select any of the eligible recipients that should receive electronic service upon submission of the filing.

Tip Some of the eligible recipients may be defaulted to receive eService automatically, but this can be changed at your discretion.



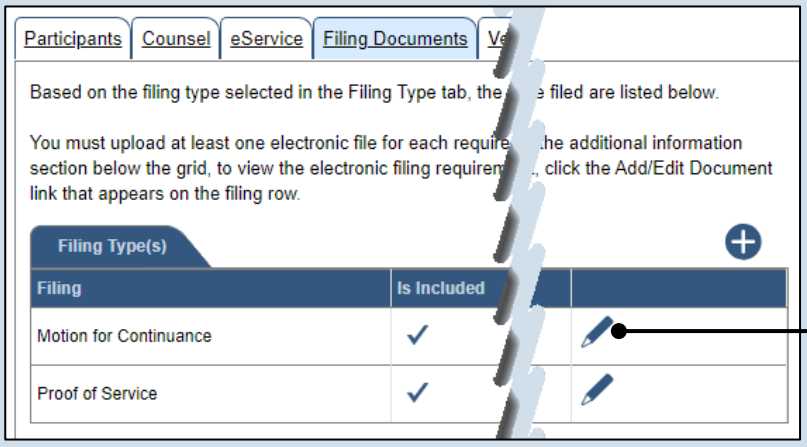
14. Click NEXT

15. Generate the proof of service

Before proceeding in the PACFile wizard, you must create your proof of service document. This task needs to be completed outside of PACFile in a program of your choosing.

Be sure to include any individuals notified via eService and to save this document as a PDF.

Tip Click the SAVE button in the wizard. If you logout of PACFile before continuing this process, your filing can be found under the Saved Filings tab of your Dashboard.



16. Initiate the process to upload the filing document

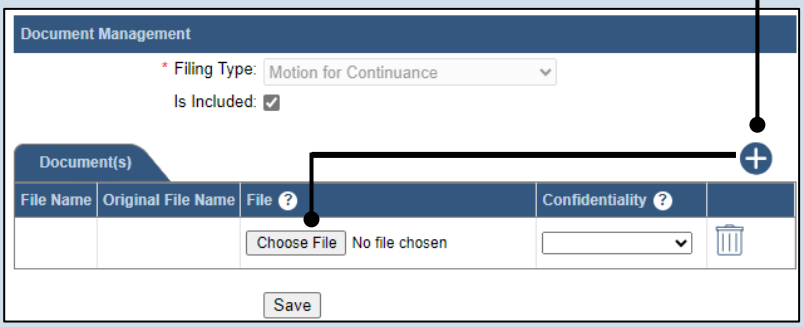
In the Filing Documents tab, click the Manage Documents icon in the grid for the primary filing type.

How to File on an Existing Case (Juvenile, Dependency, Other)

PACFile®

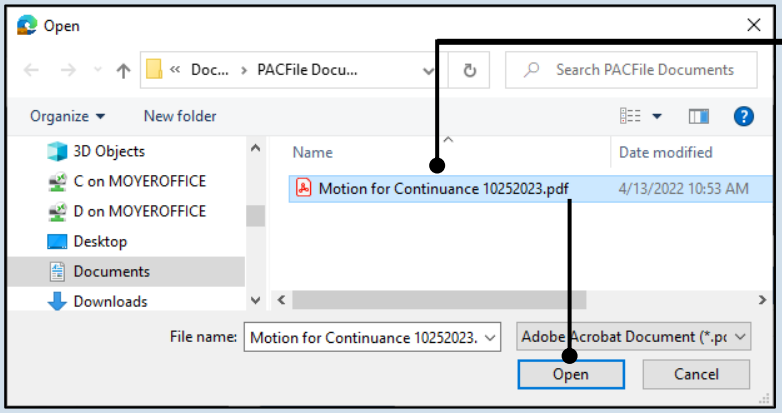
17. Initiate the search for your document

In the Document Management popup screen, click the Add Document icon, then click CHOOSE FILE.



18. Upload the electronic version of the filing

In the popup screen that appears, locate the electronic version of the filing on your computer or movable storage device (ex. memory stick). Select the file and click OPEN.

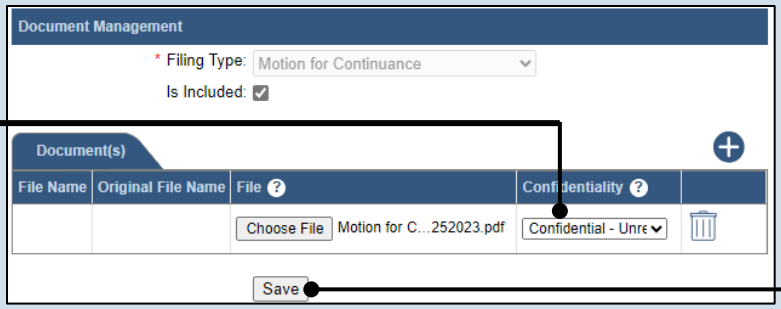


19. Select a confidentiality

Click on the dropdown and choose the appropriate confidentiality for the document.

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



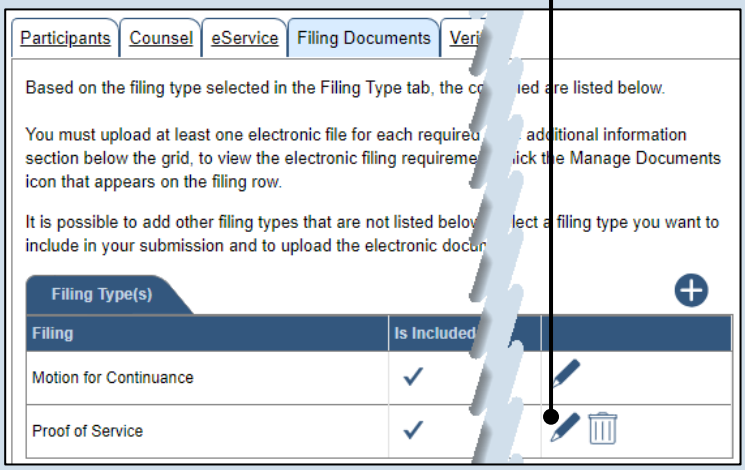
20. Click SAVE

How to File on an Existing Case (Juvenile, Dependency, Other)

PACFile®

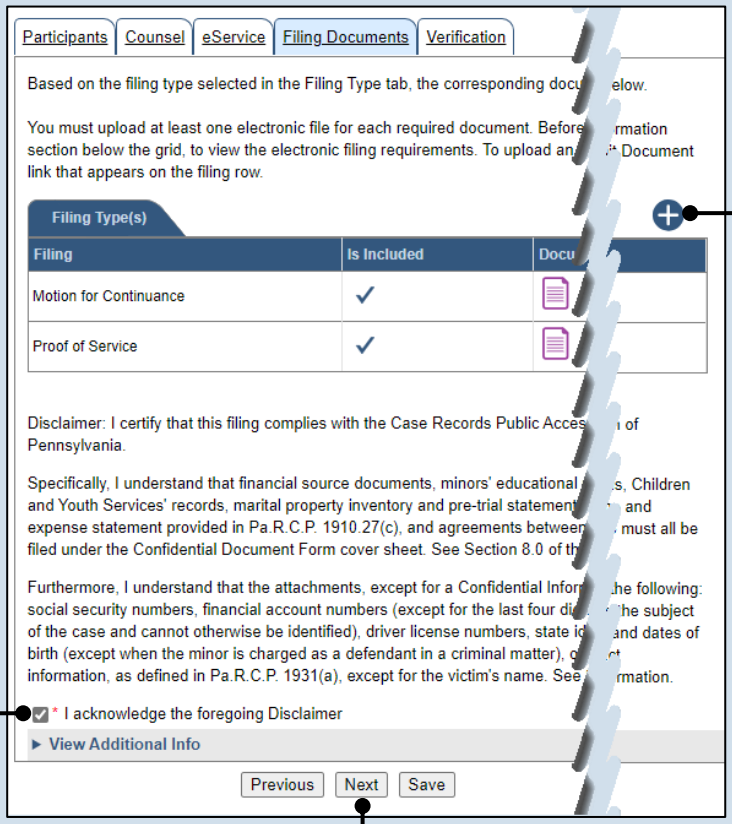
21. Upload the proof of service

In the Filing Documents tab, click the Manage Documents icon in the grid for the Proof of Service filing type and use Steps 17 - 20 a guide to upload the document.



22. (Optional) Add another filing type & document

If there are additional documents to file now, click the Add Optional Filing icon to access the Document Management popup (not shown here). Choose the appropriate filing type, then use Steps 17 - 20 as a guide to upload the electronic document for the optional filing.



23. Acknowledge the disclaimer statement

Review the statement and acknowledge it by selecting the checkbox.

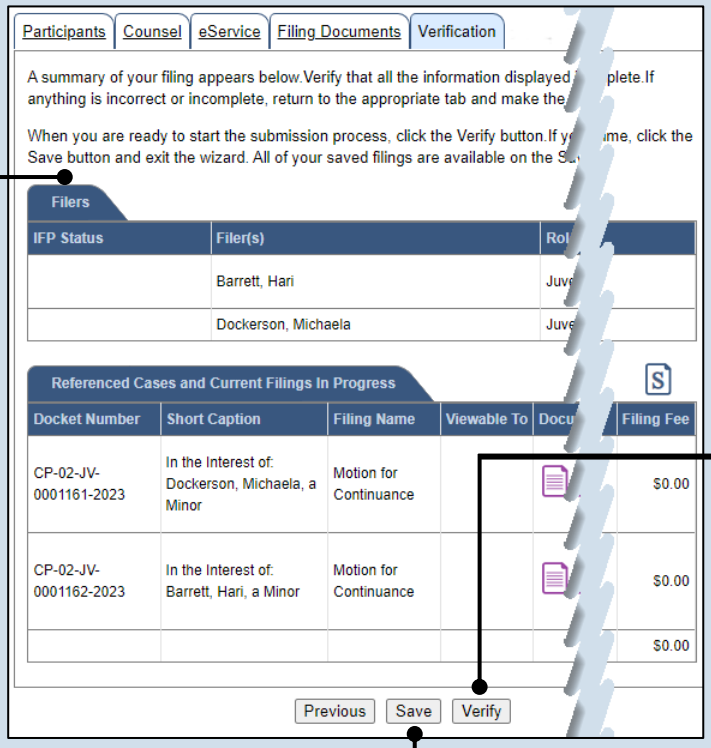
24. Click NEXT

How to File on an Existing Case (Juvenile, Dependency, Other)

PACFile®

25. 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.



26. Decide to file now or file later

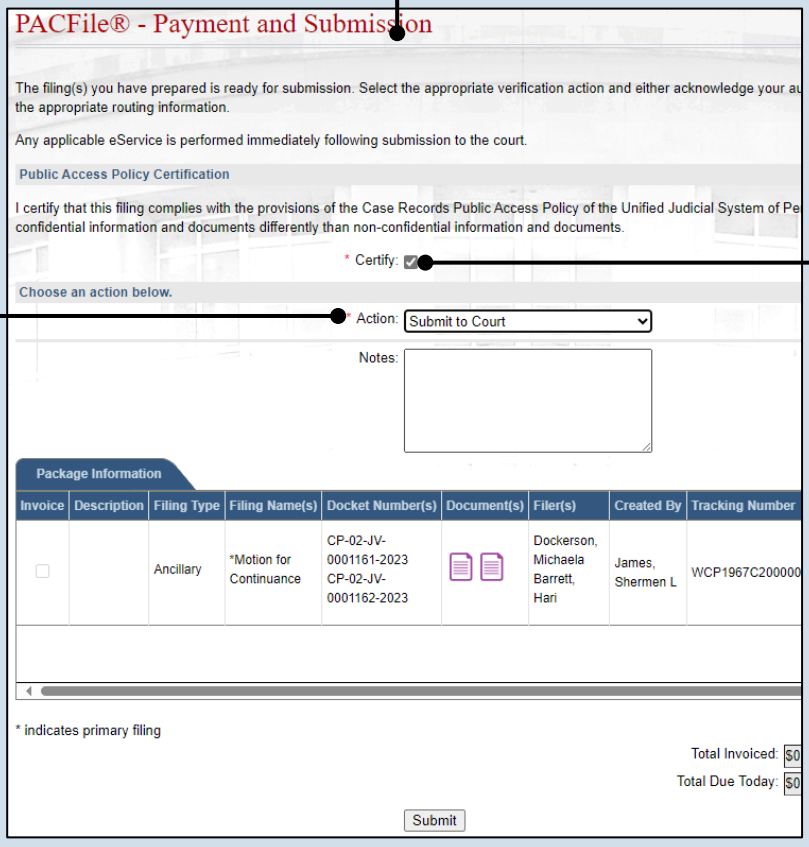
You must choose from one of two options to determine how to proceed:

Option 1: If you want to submit this filing now, click the VERIFY button, and continue to Step 27.

Option 2: If you don't want to submit this filing now, click the SAVE button and then return to your dashboard. THIS PROCESS IS COMPLETE.

27. Review the Payment and Submission page

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



28. 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

29. Choose an action

Select one of the following actions and proceed to the corresponding step:

- 'Request for Approval' – Select if the filing requires supervisory approval prior to submission. Continue to Step 30.
- 'Submit to Court' – Select if the filing can be submitted without additional approval. Proceed to Step 31.

How to File on an Existing Case (Juvenile, Dependency, Other)

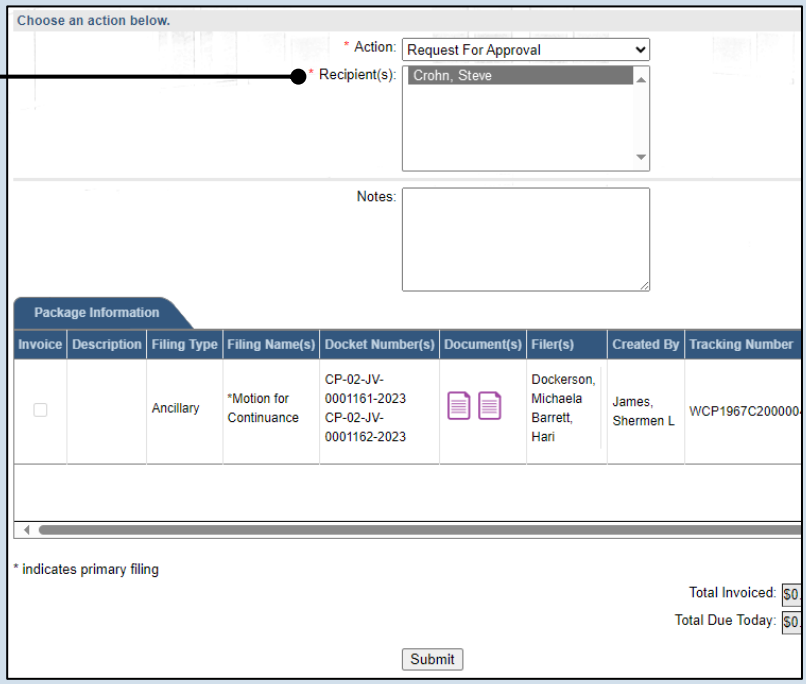
PACFile®

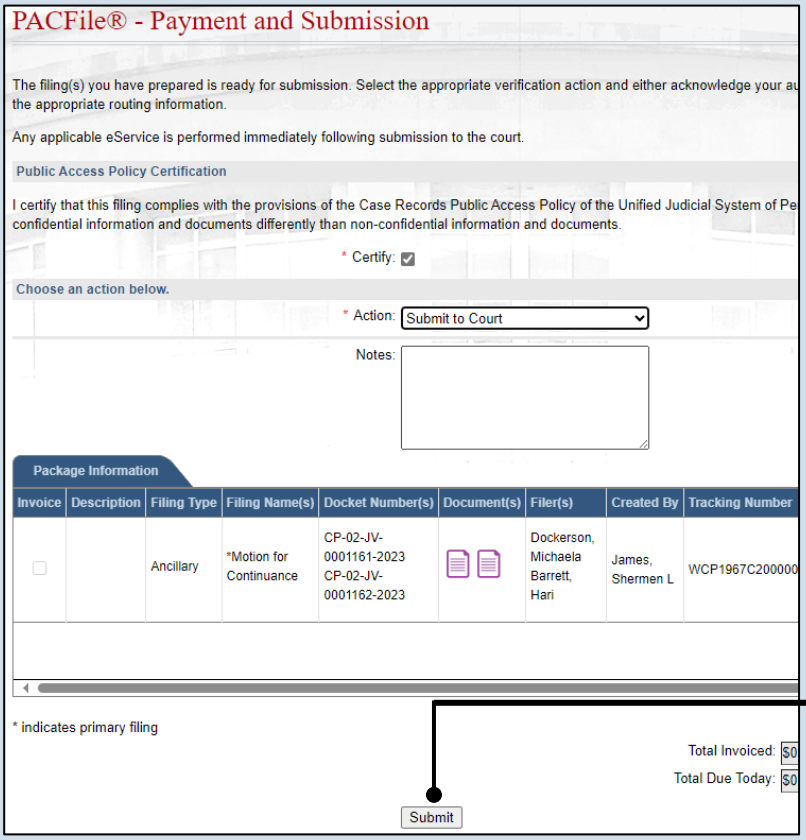
30. Identify an approver

Select the checkbox(es) for one or more of the 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).





31. Click SUBMIT

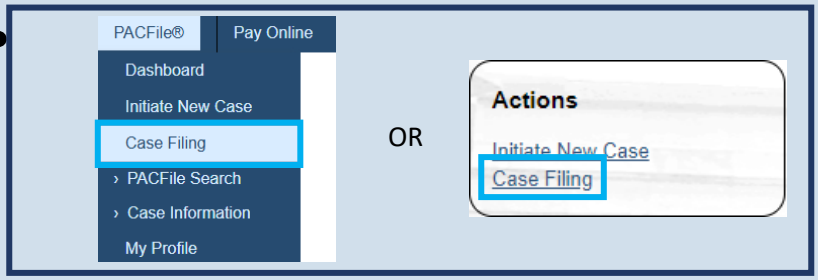
This initiates the selected action.

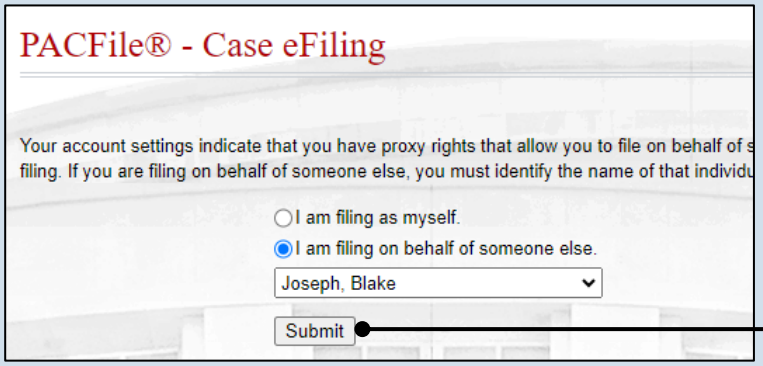
How to File on an Existing Case (Criminal)

PACFile®

1. Open the case filing wizard

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





2. Select your proxy status

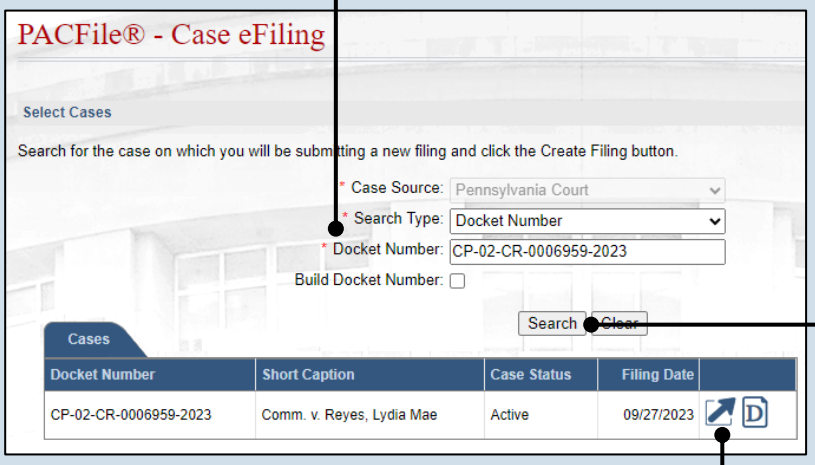
If you have the proxy rights to file on behalf of someone else, you will see the proxy selection screen. Choose between the two options and click SUBMIT.

If you have no proxy rights, you will not see this screen. Continue to Step 3.

3. Identify the case number for the filing

Click in the **Docket Number** field and enter the docket number of the case on which you are filing.

Tip If you do not have the exact formatting of the docket number, select the **Build Docket Number** checkbox to use selectable fields to assist in entering the number.



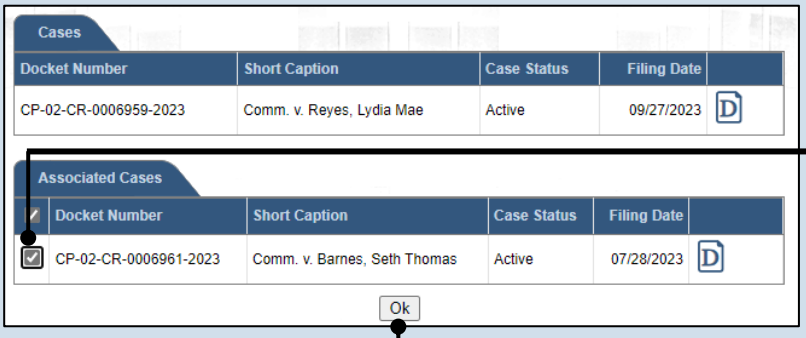
4. Click SEARCH

5. Select the case

Within the search results, click the Select Case icon appearing in the grid.

If this action does not identify any associated cases, proceed to Step 8.

If PACFile identifies associated cases, proceed to Step 6.



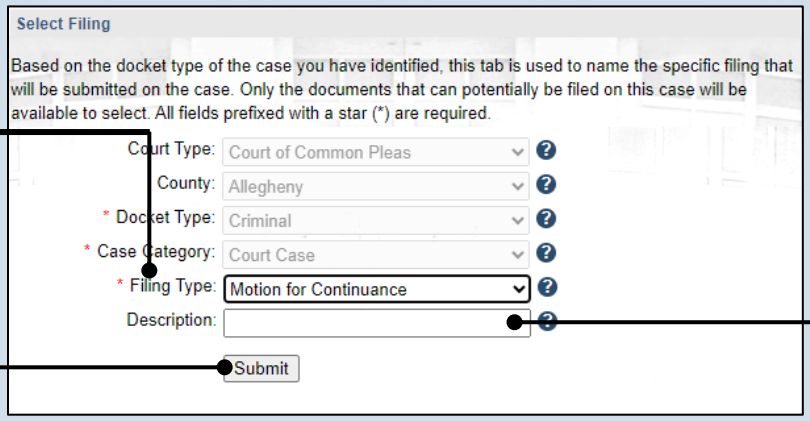
6. Specify any associated cases

When there are other cases associated with the one you identified in Step 5, they will appear below. Select the checkbox for each case to which the new filing applies.

7. Click OK

8. Select a filing type

In the **Filing Type** dropdown, select the type of document you are filing.

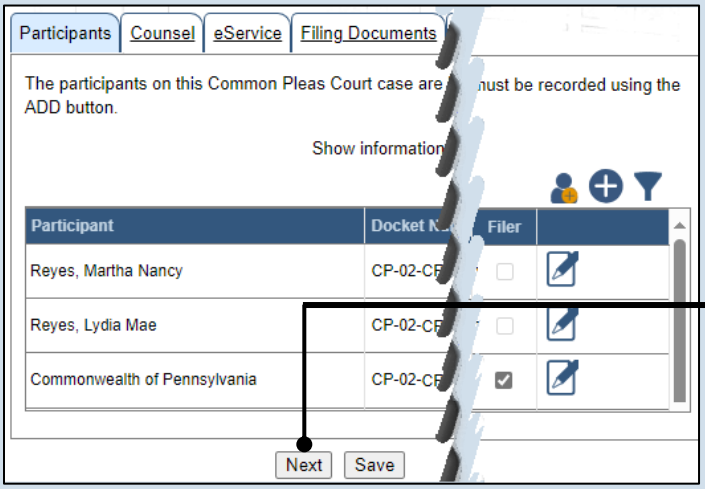


9. (Optional) Enter a description

Enter any word or phrase that will help identify your new case more conveniently through your PACFile dashboard.

Tip Anything you enter here will only be visible to you. The filing office will never see this information.

10. Click SUBMIT

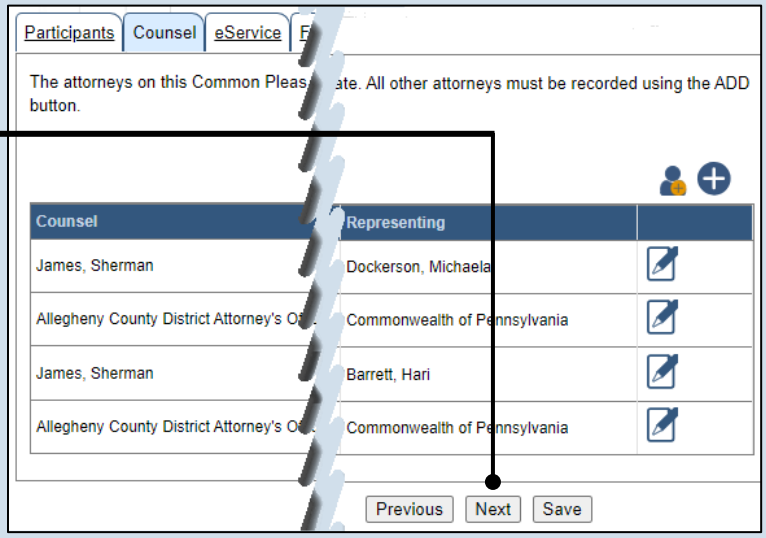


11. Bypass the Participants tab

In the Participant tab, click NEXT.

12. Bypass the Counsel tab

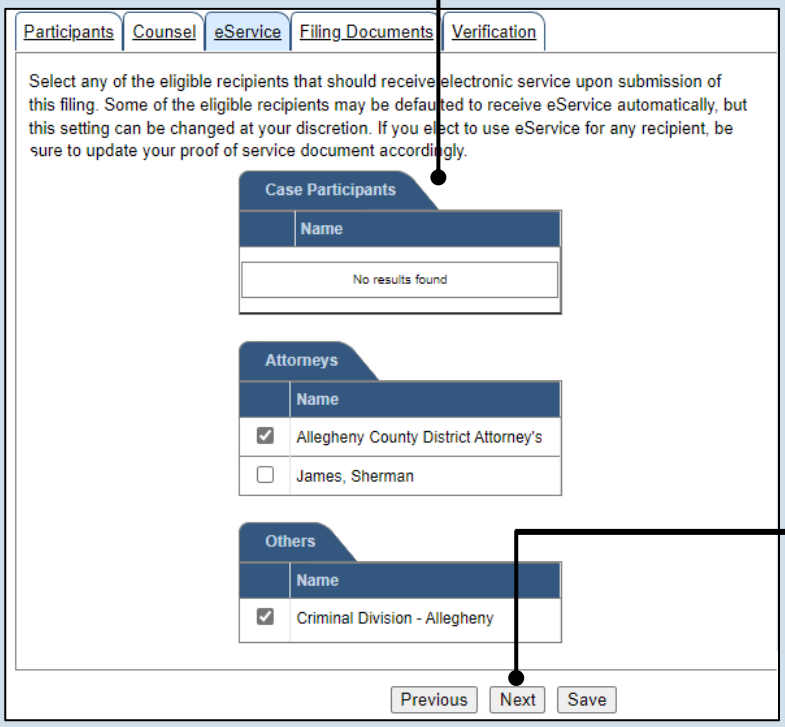
In the Counsel tab, click NEXT.



13. Identify eService recipients

In the eService tab, select any of the eligible recipients that should receive electronic service upon submission of the filing.

Tip Some of the eligible recipients may be defaulted to receive eService automatically, but this can be changed at your discretion.



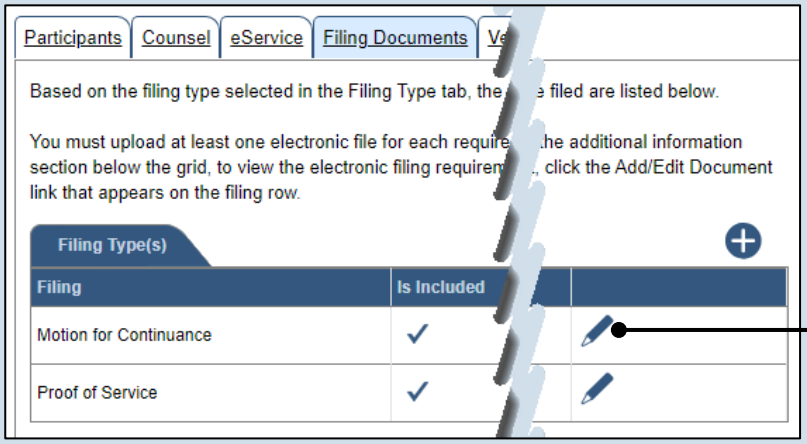
14. Click NEXT

15. Generate the proof of service

Before proceeding in the PACFile wizard, you must create your proof of service document. This task needs to be completed outside of PACFile in a program of your choosing.

Be sure to include any individuals notified via eService and to save this document as a PDF.

Tip Click the SAVE button in the wizard. If you logout of PACFile before continuing this process, your filing can be found under the Saved Filings tab on your Dashboard.

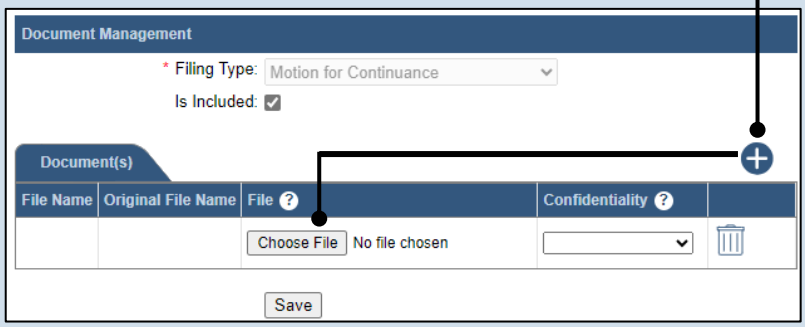


16. Initiate the process to upload the filing document

In the Filing Documents tab, click the Manage Documents icon in the grid for the primary filing type.

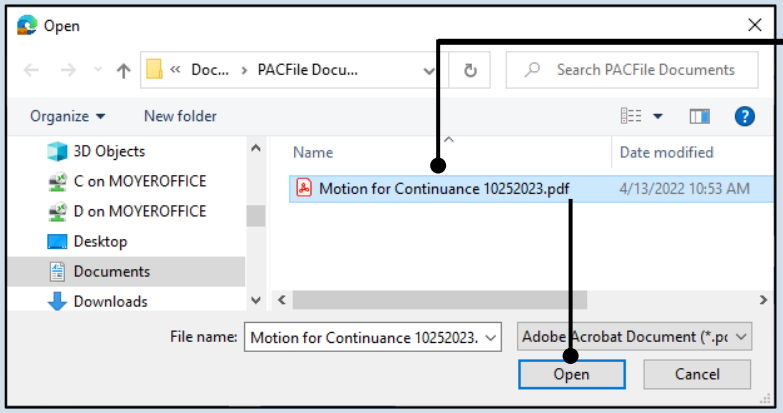
17. Initiate the search for your document

In the Document Management popup screen, click the Add Document icon and then click CHOOSE FILE.



18. Upload the electronic version of the filing

In the popup screen that appears, locate the electronic version of the filing on your computer or movable storage device (ex. memory stick). Select the file and click OPEN.

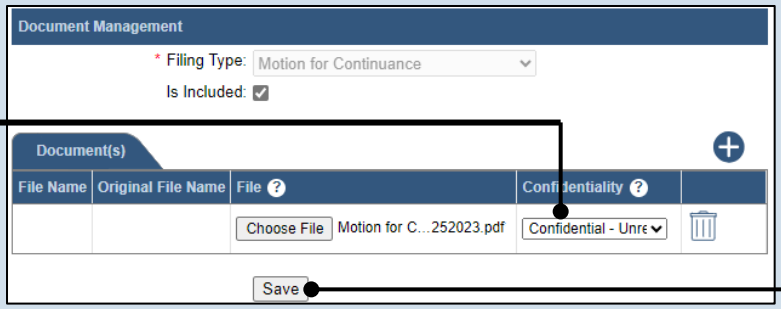


19. Select a confidentiality

Click on the dropdown and choose the appropriate confidentiality for the document.

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

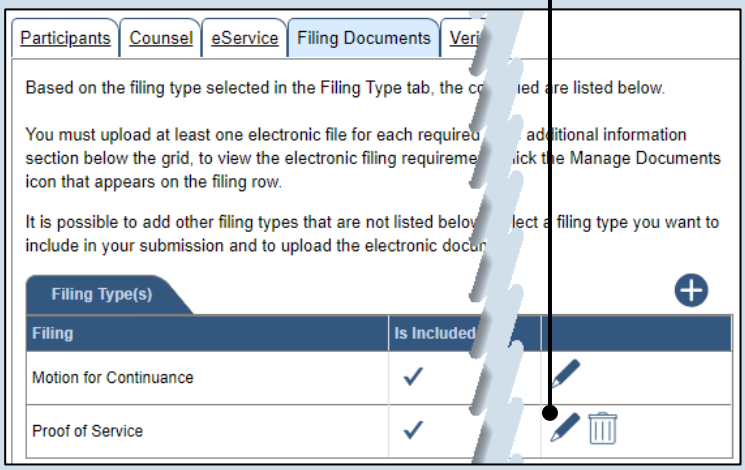
http://www.pacourts.us/public-records/public-records-forms

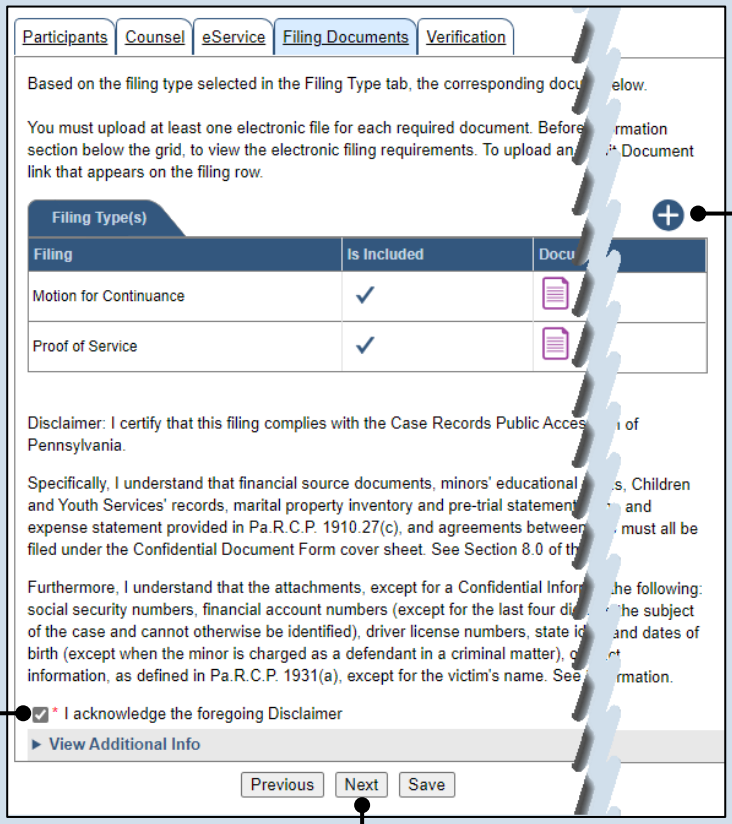


20. Click SAVE

21. Upload the proof of service

In the Filing Documents tab, click the Manage Documents icon in the grid for the Proof of Service filing type and use Steps 17 - 20 as a guide to upload the document.





22. (Optional) Add another filing type & document

If there are additional documents to file now, click the Add Optional Filing icon to access the Document Management popup (not shown here). Choose the appropriate filing type, then use Steps 17-20 as a guide to upload the electronic document for the optional filing.

23. Acknowledge the disclaimer statement

Review the statement and acknowledge it by selecting the checkbox.

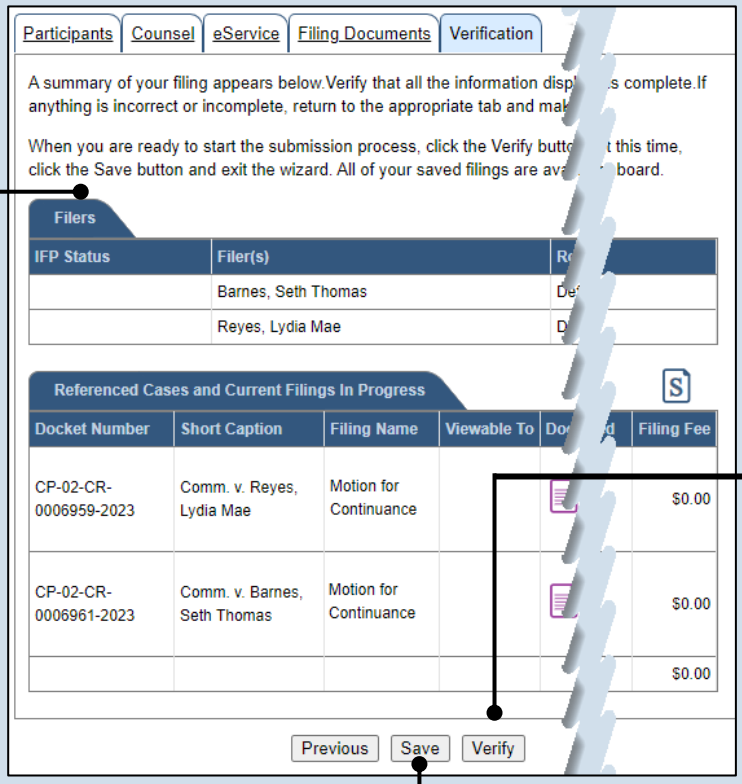
24. Click NEXT

How to File on an Existing Case (Criminal)

PACFile®

25. 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.



26. Decide to file now or file later

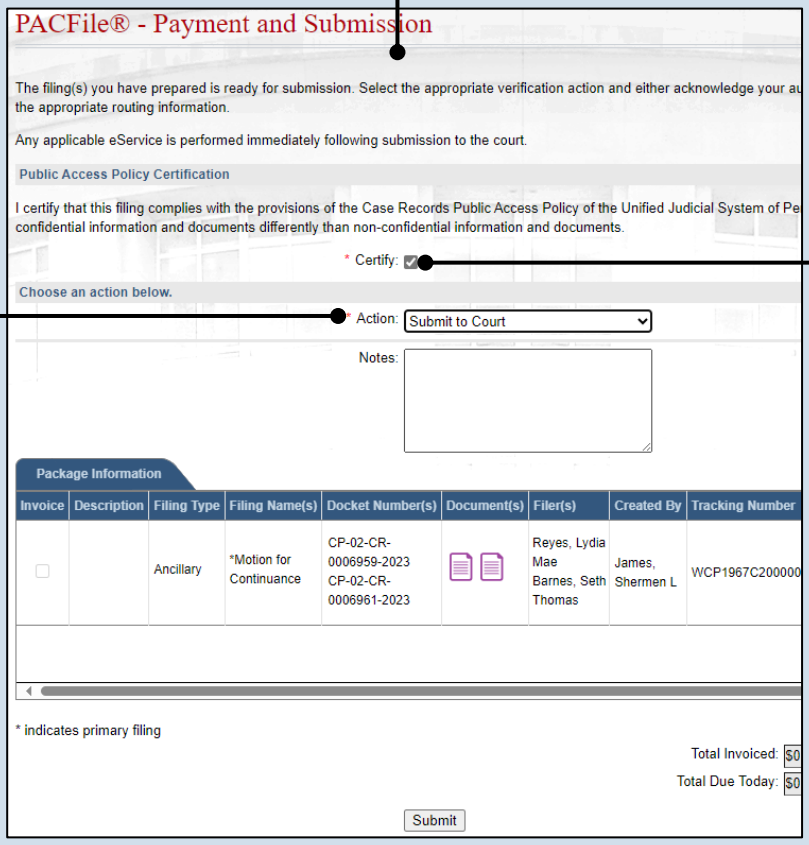
You must choose from one of two options to determine how to proceed:

Option 1: If you want to submit this filing now, click the VERIFY button, and continue to Step 27.

Option 2: If you don't want to submit this filing now, click the SAVE button and then return to your dashboard. THIS PROCESS IS COMPLETE.

27. Review the Payment and Submission page

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



28. Certify the filing

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

29. Choose an action

Select one of the following actions and proceed to the corresponding step:

- 'Request for Approval' – Select if the filing requires supervisory approval prior to submission. Continue to Step 30.
- 'Submit to Court' – Select if the filing can be submitted without additional approval. Proceed to Step 31.

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

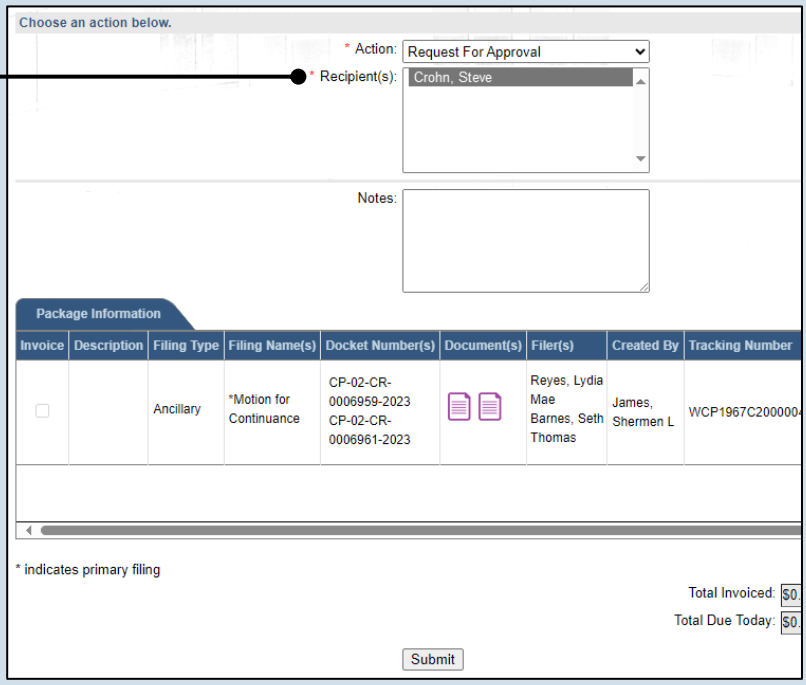
http://www.pacourts.us/public-records/public-records-forms

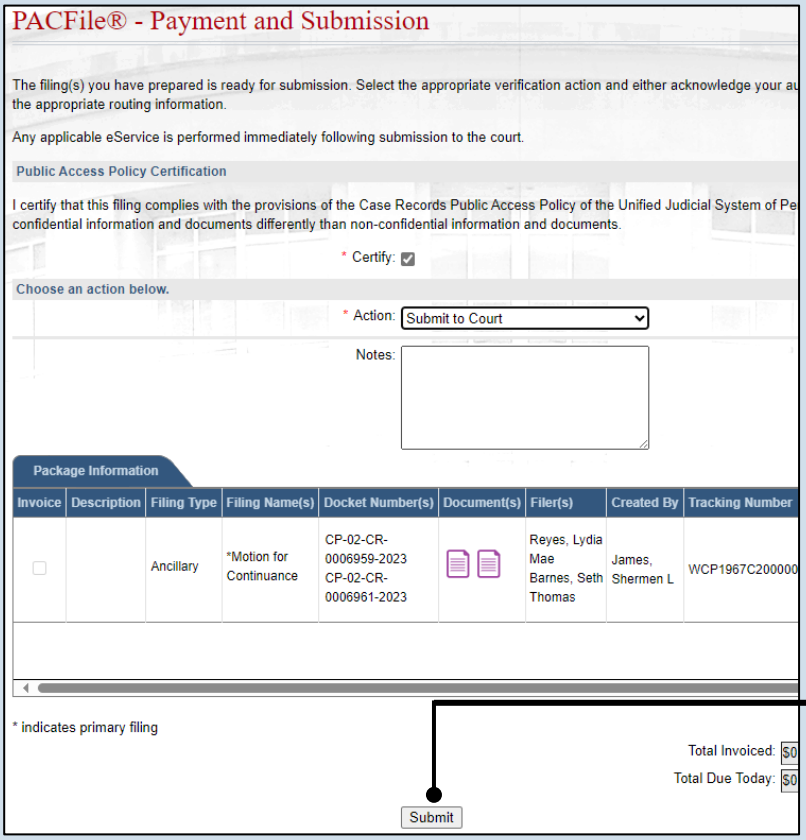
30. Identify an approver

Select the one or more of the 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).





31. Click SUBMIT

This initiates the selected action.

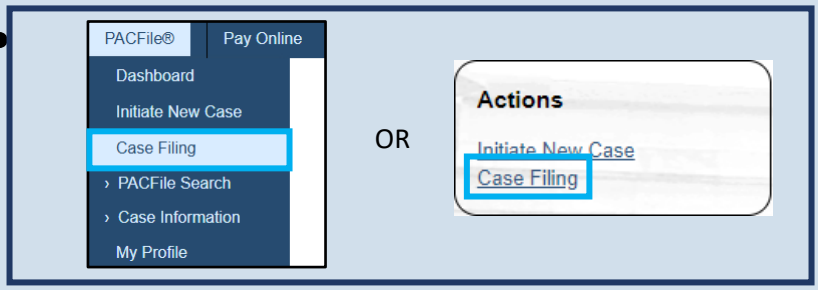
END

How to File an Appearance on an Existing Case

PACFile®

1. Open the case filing wizard

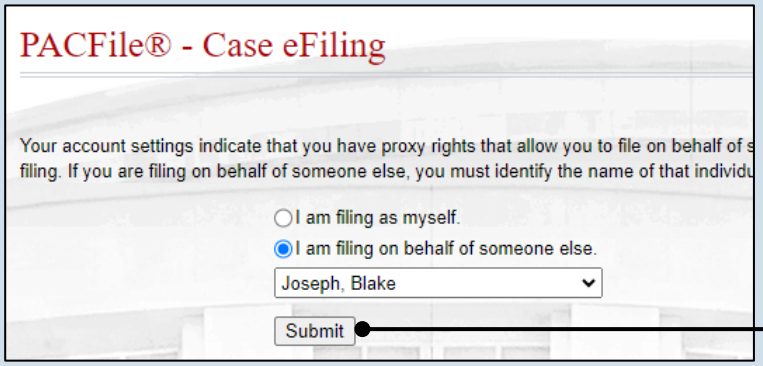
Click on the 'Case Filing' option in the PACFile menu or the *Case Filing* link on your Dashboard.



2. Select your proxy status

If you have the proxy rights to file on behalf of someone else, you will see the proxy selection screen. Choose between the two options and click SUBMIT.

If you have no proxy rights, you will not see this screen. Continue to Step 3.

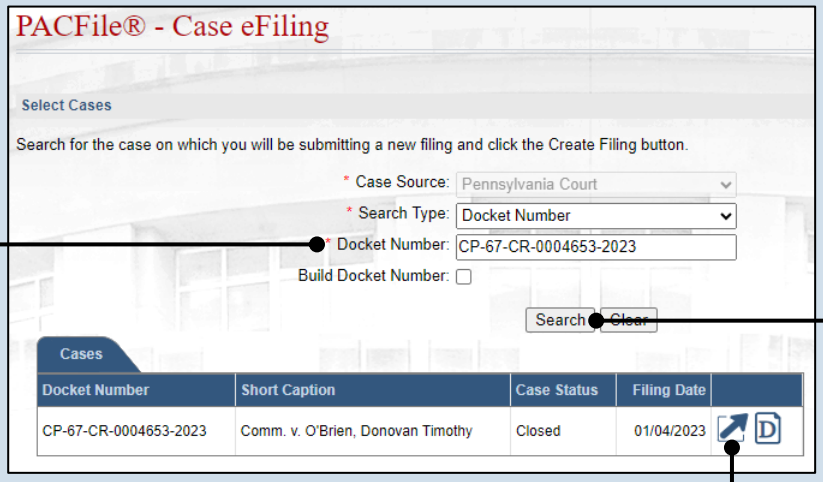


3. Identify the case number for the filing

In the Select Cases screen, click in the **Docket Number** field and enter the docket number of case on which you are filing.

Tip If you do not have the exact formatting of the docket number, select the **Build Docket Number** checkbox to use selectable fields to assist in entering the number.

4. Click SEARCH



5. Select the case

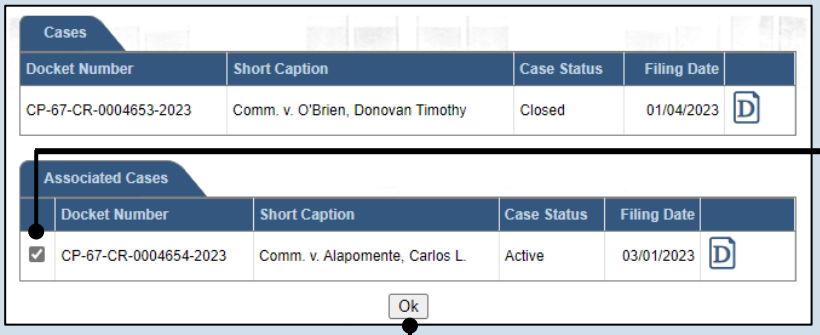
Within the search results, click the Select Case icon appearing in the grid.

If this action does not identify any associated cases, proceed to Step 8.

If PACFile identifies associated cases, continue to Step 6.

6. Specify any associated cases

When there are other cases associated with the one you identified in Step 5, they will appear below. Select the checkbox for each case to which the new filing applies.



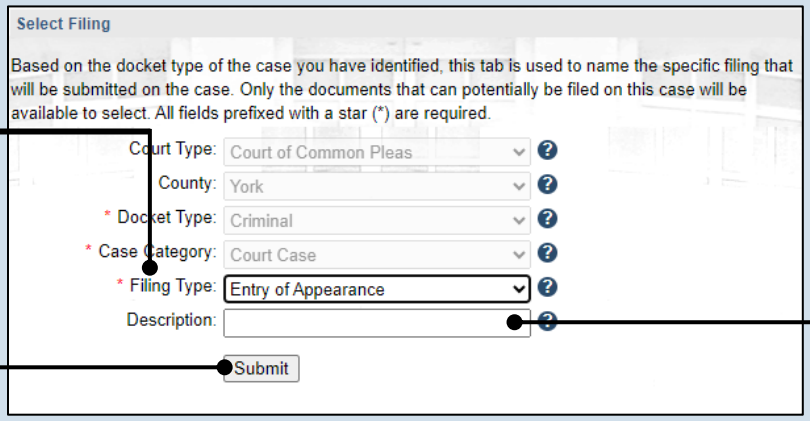
7. Click OK

How to File an Appearance on an Existing Case

PACFile®

8. Select the Filing Type

In the Select Filing screen, click the **Filing Type** dropdown and select 'Entry of Appearance'.

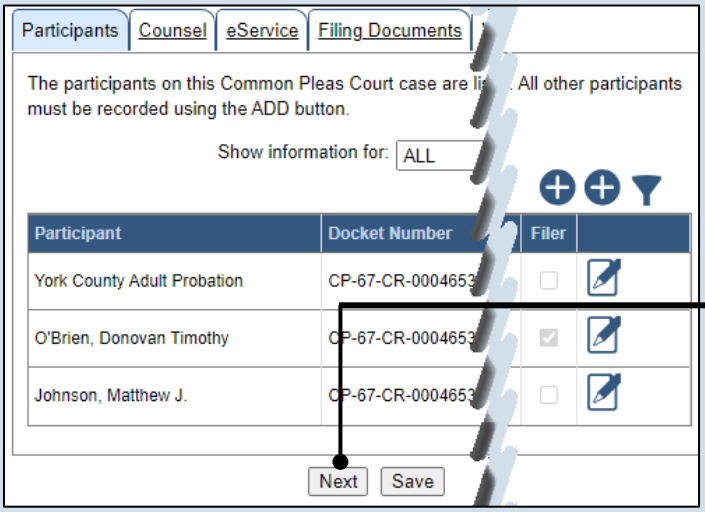


9. (Optional) Enter a description

Enter any word or phrase that will help identify your new case more conveniently through your PACFile dashboard.

Tip Anything you enter here will only be visible to you. The filing office will never see this information.

10. Click SUBMIT



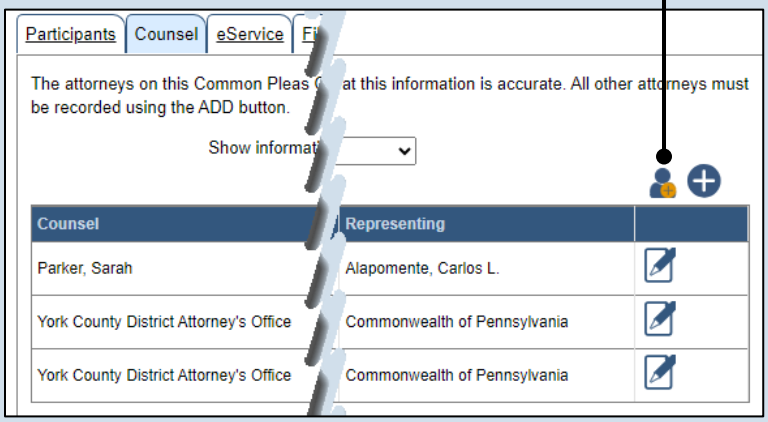
11. Bypass the Participants tab

In the Participant tab, click NEXT.

Tip The names of case participants will be redacted using initials on juvenile and other secure case types. Protected participants (ex. crime victims, witnesses, etc.) are redacted on all case types.

12. Initiate the process to add yourself as an attorney

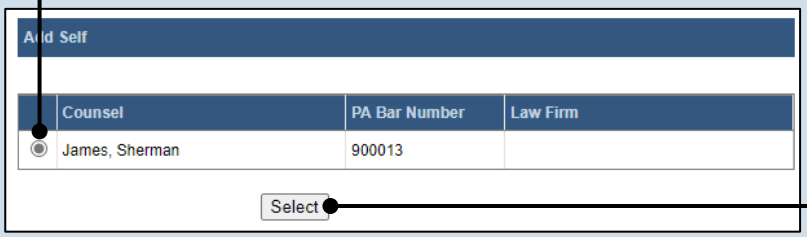
In the Counsel tab, click the Add Self icon above the grid. The Add Self popup displays.



Tip If you are an attorney, the Add Self function will add you as an attorney. If you are filing on behalf of an attorney, the Add Self function adds that attorney.

13. Select the attorney record

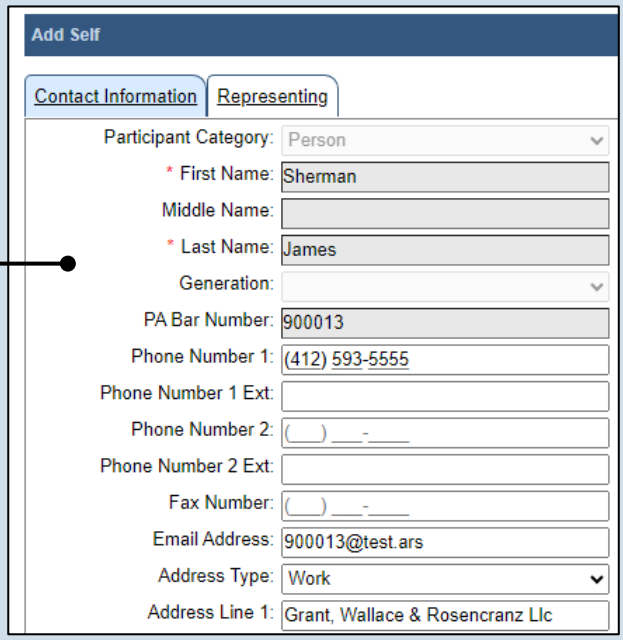
In the Add Self popup screen, select the radio button next to the attorney's name.



14. Click SELECT

15. Verify the contact information

The contact information that appears is based on what is on file with the Pennsylvania Disciplinary Board. Review and update the information for this case as needed.

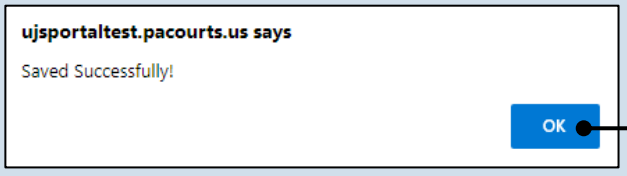


16. Identify the case participants

Click on the Representing tab and select the checkbox for the participant(s) the new attorney is representing on the case.



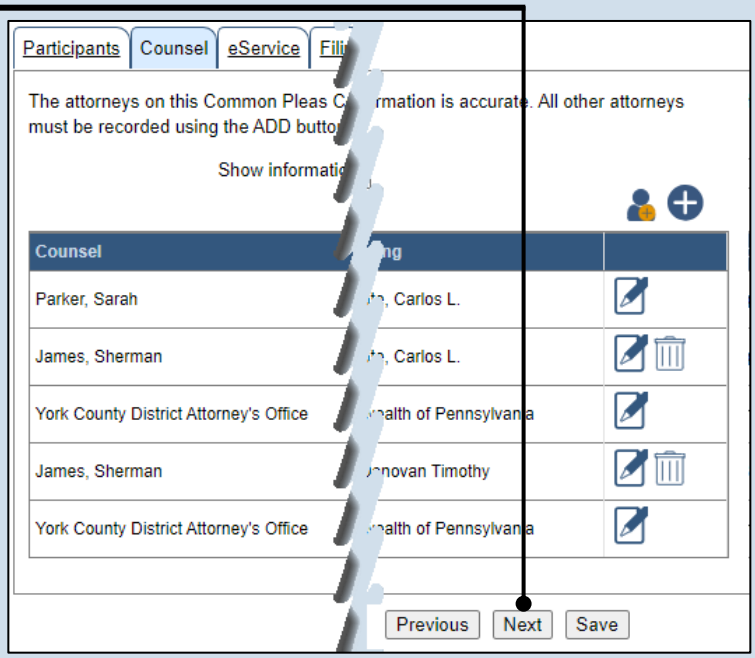
17. Click SAVE

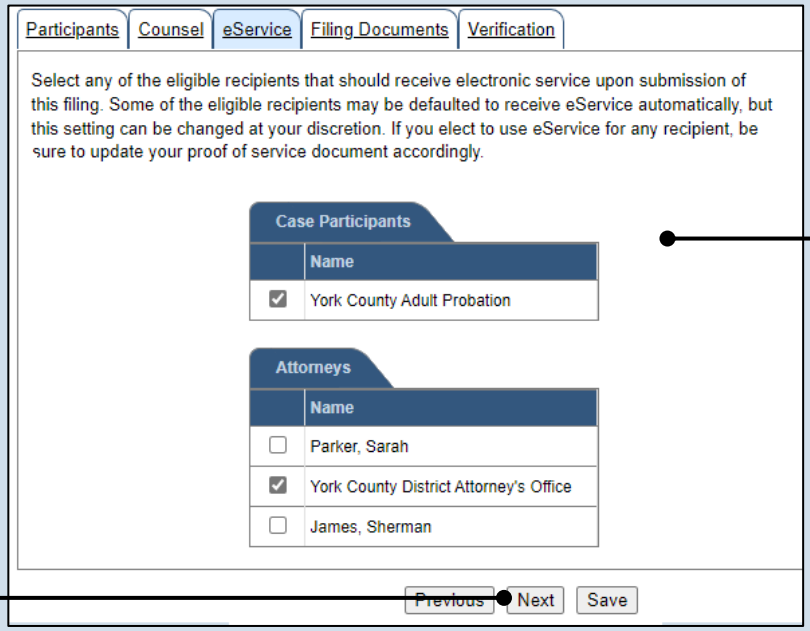


18. On the confirmation message, click OK

The attorney record is added to the grid in the Counsel tab.

19. Click NEXT





20. Identify eService recipients

In the eService tab, select any of the eligible recipients that should receive electronic service upon submission of the filing.

Tip Some of the eligible recipients may be defaulted to receive eService automatically, but this can be changed at your discretion.

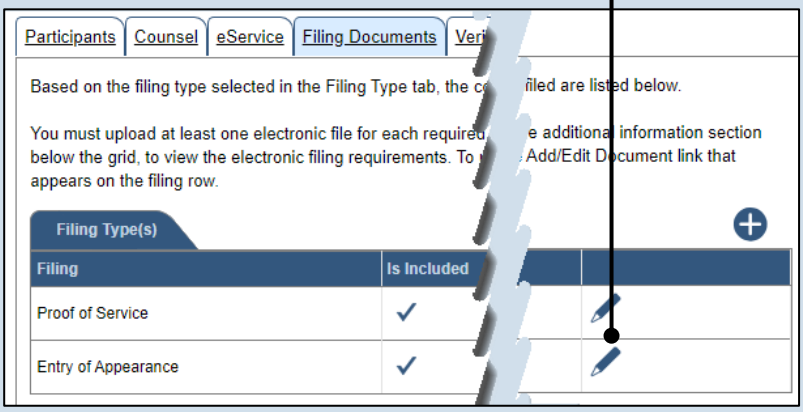
21. Click NEXT

22. Generate the proof of service

Before proceeding in the PACFile wizard, you must create your proof of service document. This task needs to be completed outside of PACFile in a program of your choosing.

Be sure to include any individuals notified via eService and to save this document as a PDF.

Tip Click the SAVE button in the wizard. If you logout of PACFile before continuing this process, your filing can be found under the Saved Filings tab on your Dashboard.

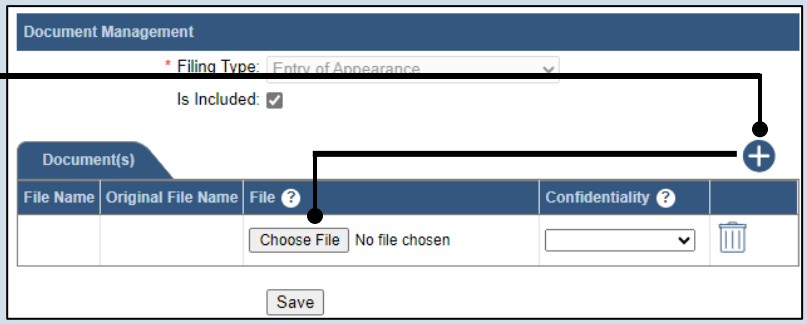


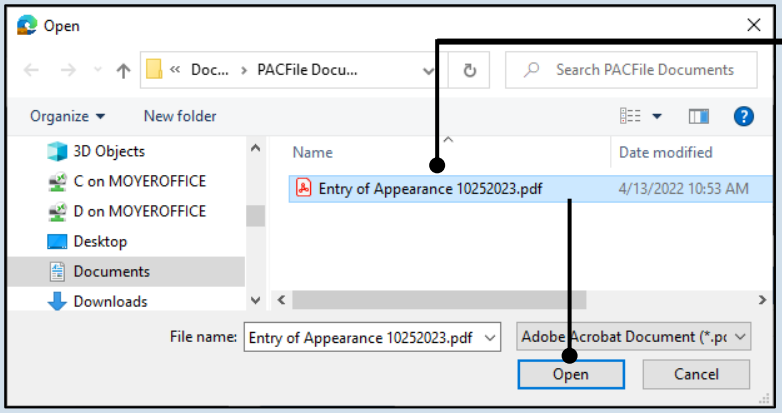
23. Initiate the process to upload the entry of appearance document

In the Filing Documents tab, click the Manage Documents icon in the grid for the Entry of Appearance.

24. Initiate the search for your document

In the Document Management popup screen, click the Add Document icon, then click CHOOSE FILE.



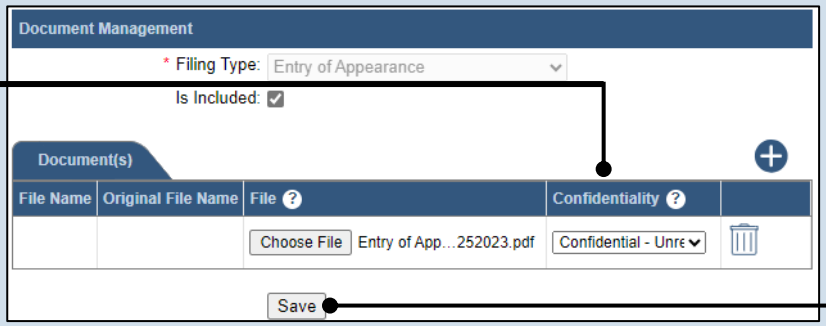


25. Upload the electronic version of the filing

In the popup screen that appears, locate the electronic version of the filing on your computer or movable storage device (ex. memory stick). Select the file and click OPEN.

26. Select a confidentiality

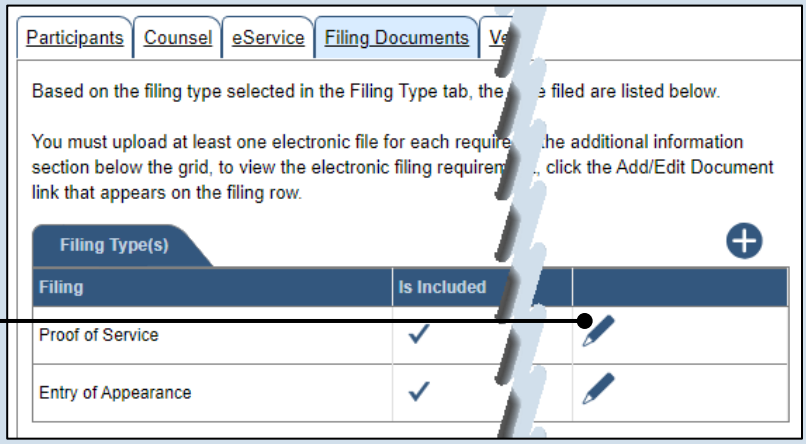
Click on the dropdown and choose the appropriate confidentiality for the document.



27. Click SAVE

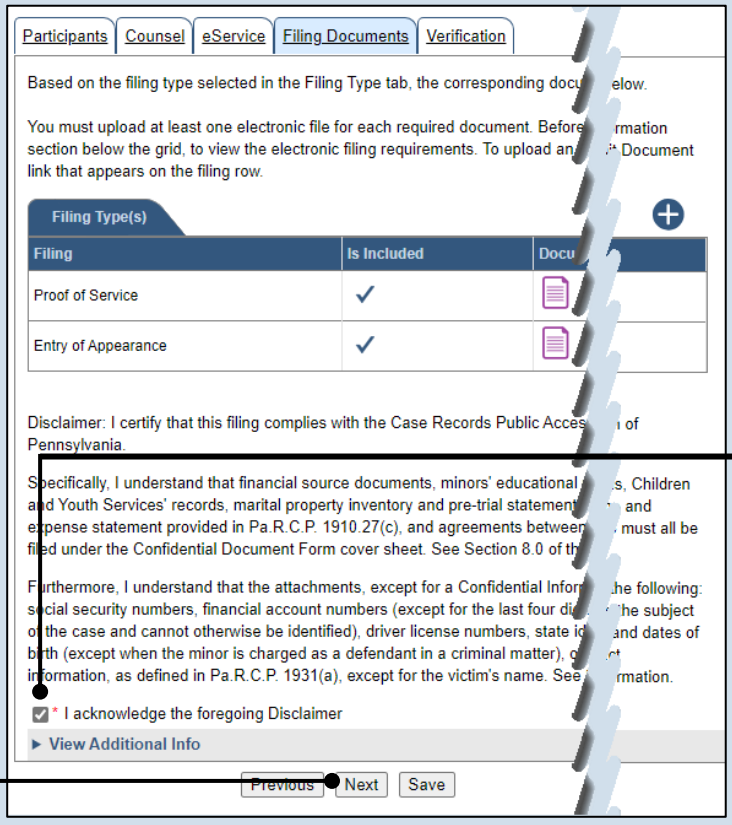
Tip This selection is required based on the court's Public Access Policy. You can view the policy at the following web address:

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



28. Upload the proof of service

In the Filing Documents tab, click the Manage Documents icon in the grid for the Proof of Service filing type and use Steps 24 - 27 as a guide to upload the document.



29. Acknowledge the disclaimer statement

Review the statement and acknowledge it by selecting the checkbox.

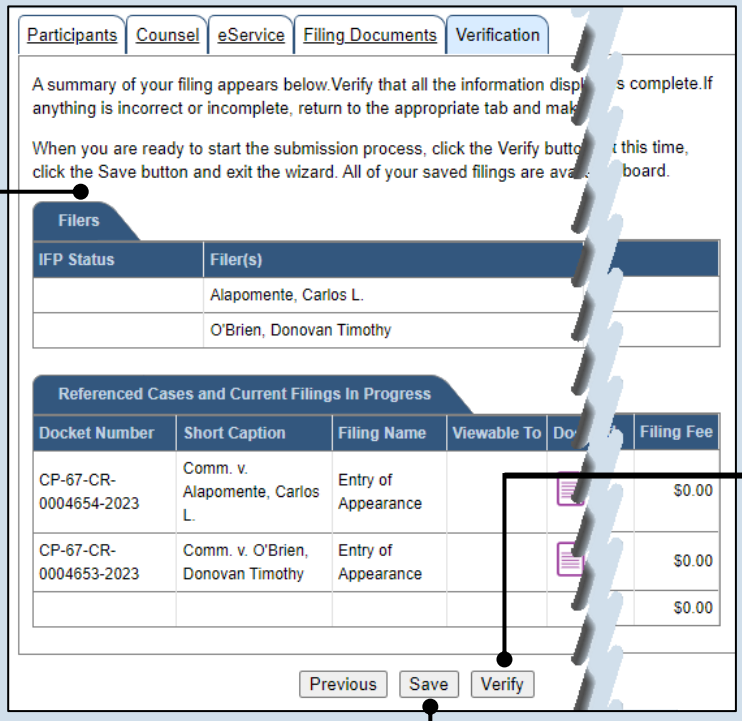
30. Click NEXT

How to File an Appearance on an Existing Case

PACFile®

31. 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.



32. Decide to file now or file later

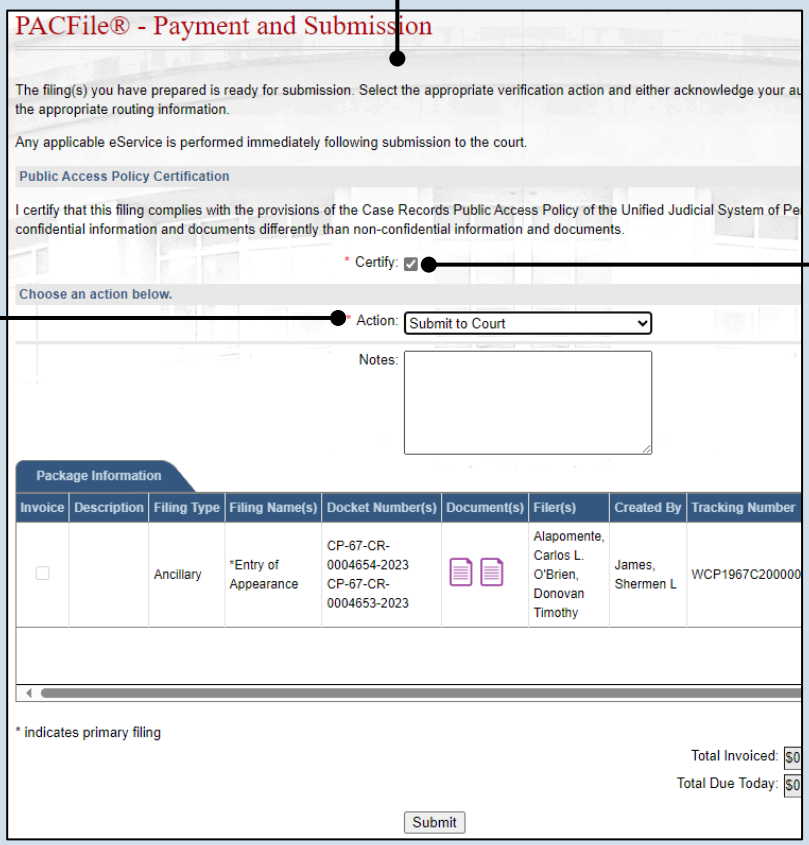
You must choose from one of two options to determine how to proceed:

Option 1: If you want to submit this filing now, click the VERIFY button, and continue to Step 33.

Option 2: If you don't want to submit this filing now, click the SAVE button and then return to your dashboard. THIS PROCESS IS COMPLETE.

33. Review the Payment and Submission page

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



34. 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

35. Choose an action

Select one of the following actions and proceed to the corresponding step:

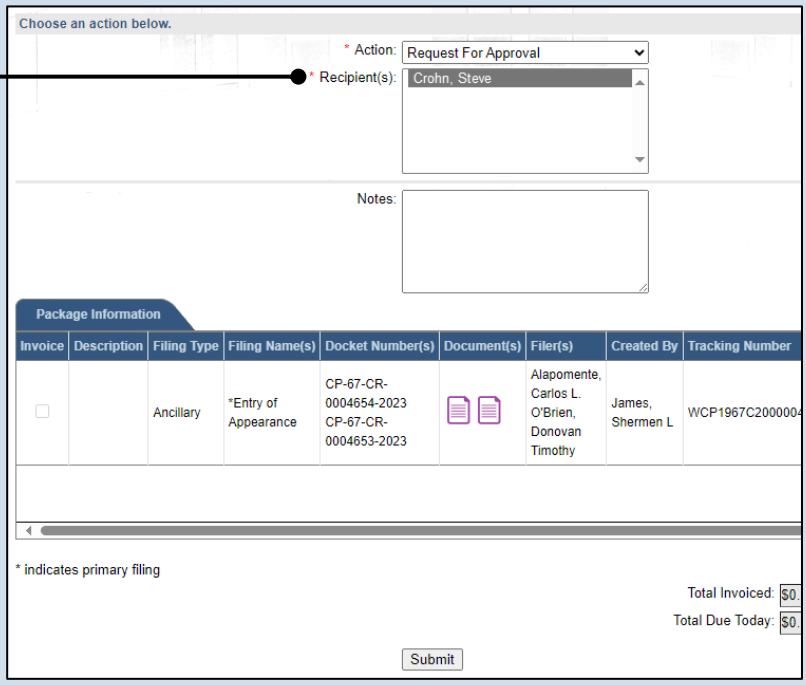
- 'Request for Approval' – Select if the filing requires supervisory approval prior to submission. Continue to Step 36.
- 'Submit to Court' – Select if the filing can be submitted without additional approval. Proceed to Step 37.

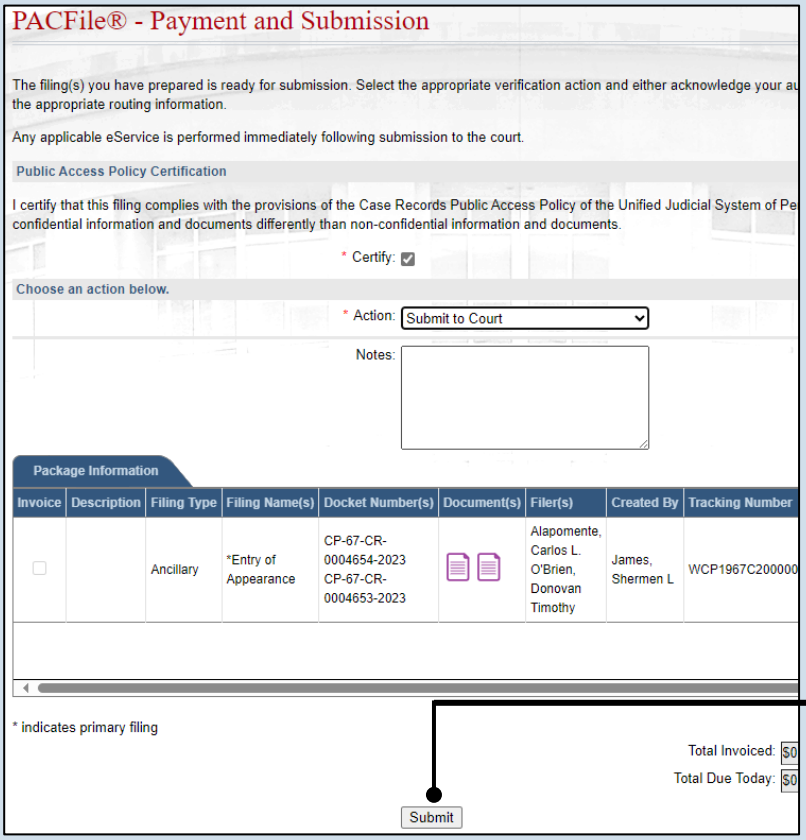
36. Identify an approver

In the Recipient(s) field, select one or more of the 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).





37. Click SUBMIT

This initiates the selected action.

Working with Saved Filings

How to Continue Saved Filings

PACFile®

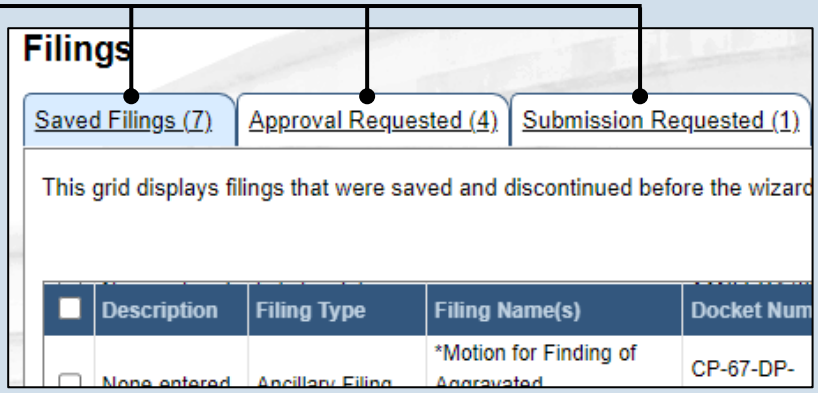
1. Continue, approve, or submit a filing?

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.



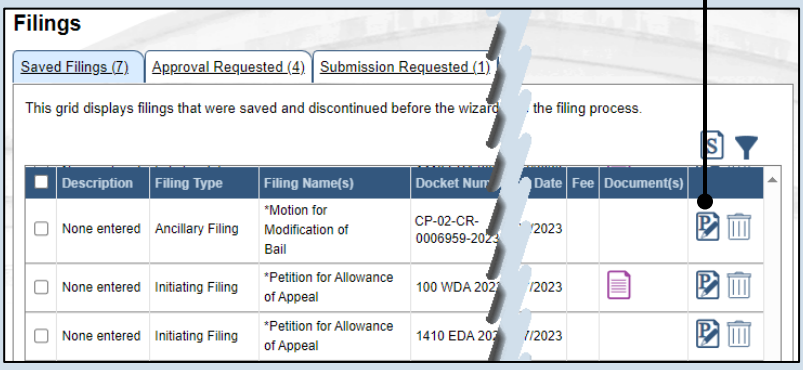
Saved Filings tab – Displays all unsubmitted filings that were saved and closed by you, a fellow proxy, or the person you are proxying for, prior to completing the Payment and Submission screen. The Payment and Submission screen appears after clicking the VERIFY button in the wizard.

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

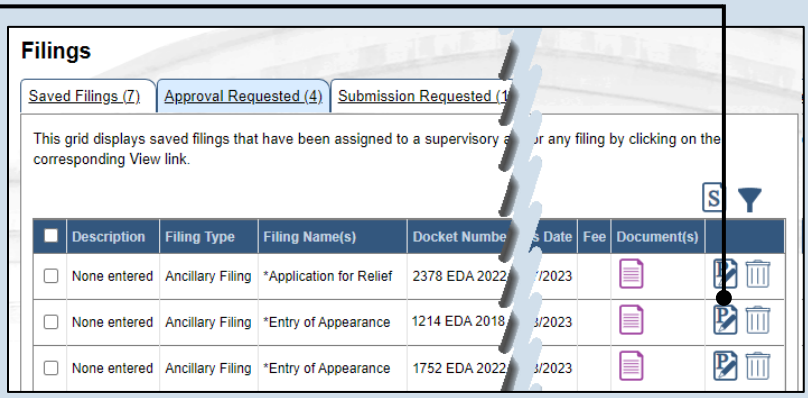
Identify the filing that you want to complete and click on the corresponding View/Edit icon.



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.

3. Open the approval requested filing

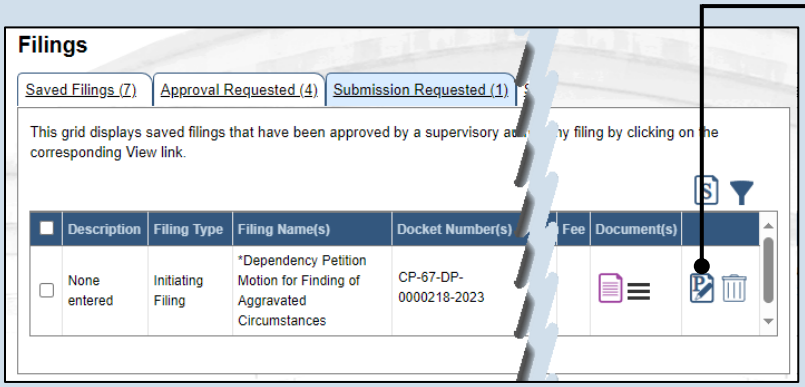
Identify the filing that you want to approve and click on the corresponding View/Edit icon.



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

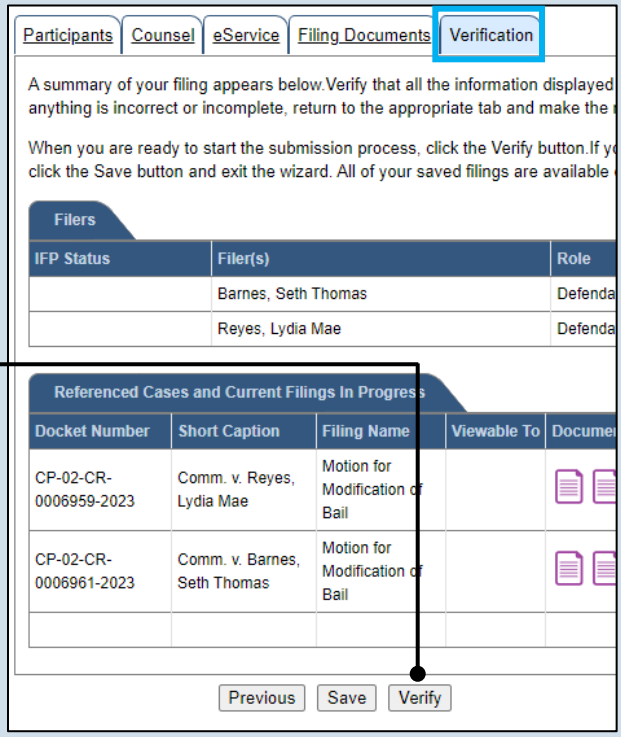
Identify the approved filing that you want to submit to the court by clicking the corresponding View/Edit icon.



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.

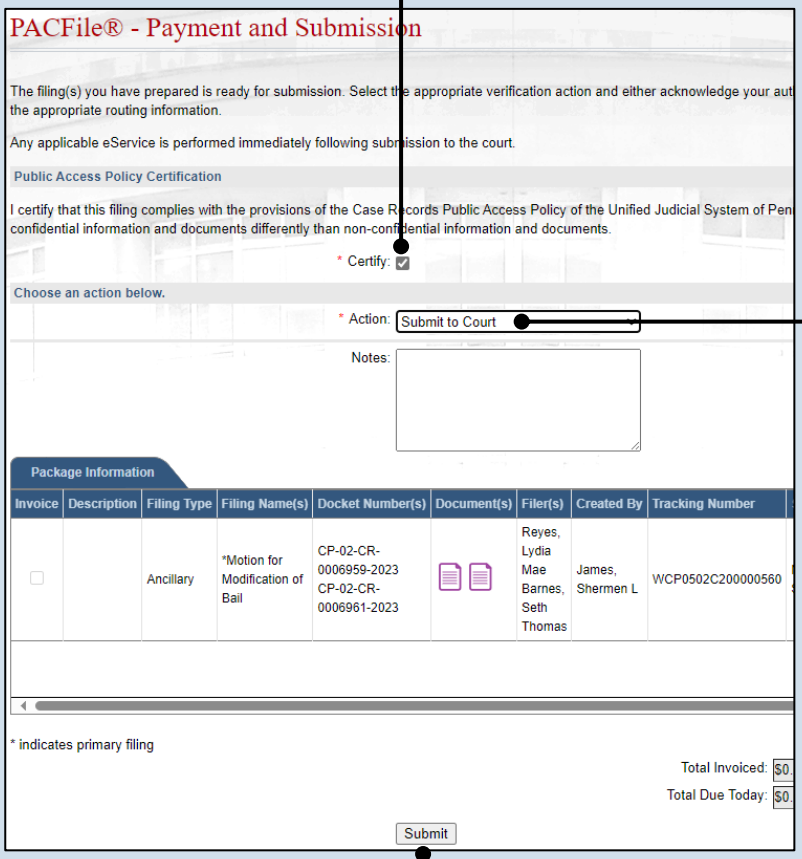


6. Certify the filing

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



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.

8. Click SUBMIT

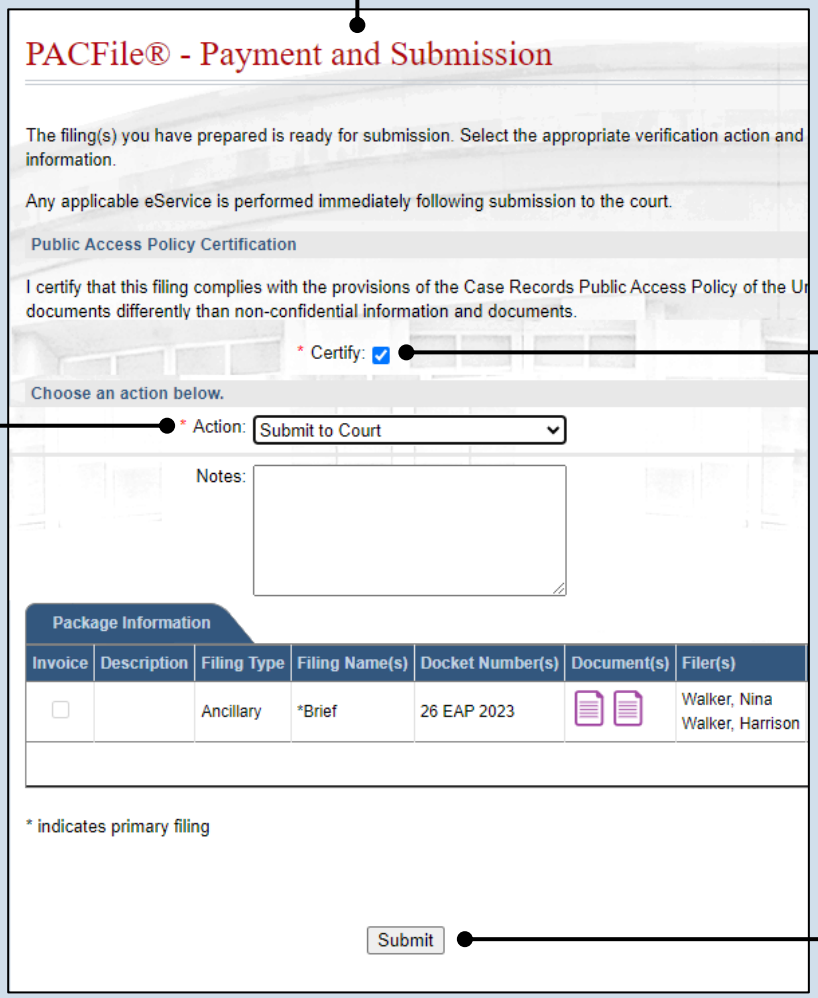
This initiates the selected verification action.

How to Submit a Filing that has no Fee

PACFile®

1. Review the Submitted Filings

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



2. 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

3. Select the verification action

Click on **Action** dropdown and select 'Submit to Court'.

Tip If the filing requires approval prior to submission, refer to the *How to Request Approval for a Filing* reference guide.

4. Click SUBMIT

This action submits your filing to the court and initiates eService for those who are eligible.

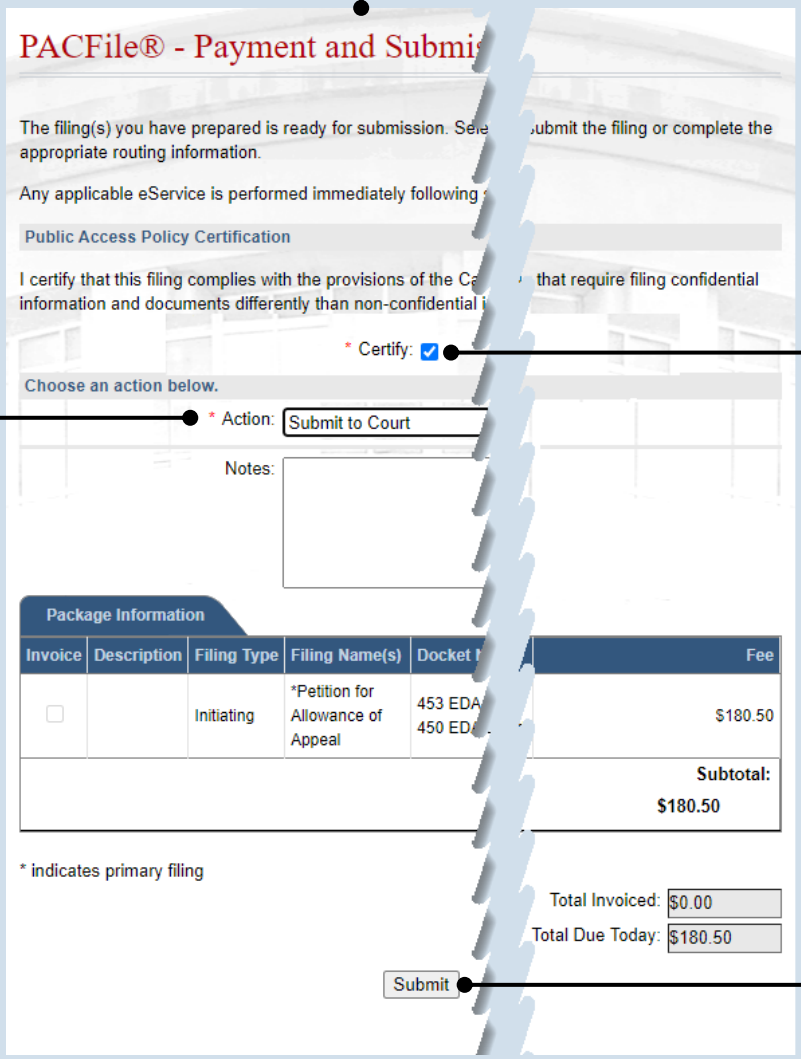
END

How to Submit a Filing with a Fee and Make a Payment

PACFile®

1. Review the submitted filing

After clicking the VERIFY button, the corresponding filing will appear in the Payment and Submission screen. Verify that the correct filing appears.



2. 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

3. Select an action

Click on **Action** dropdown and select 'Submit to Court'.

Tip If the filing requires approval prior to submission, refer to the *How to Request Approval for a Filing* reference guide.

4. Click SUBMIT

How to Submit a Filing with a Fee and Make a Payment

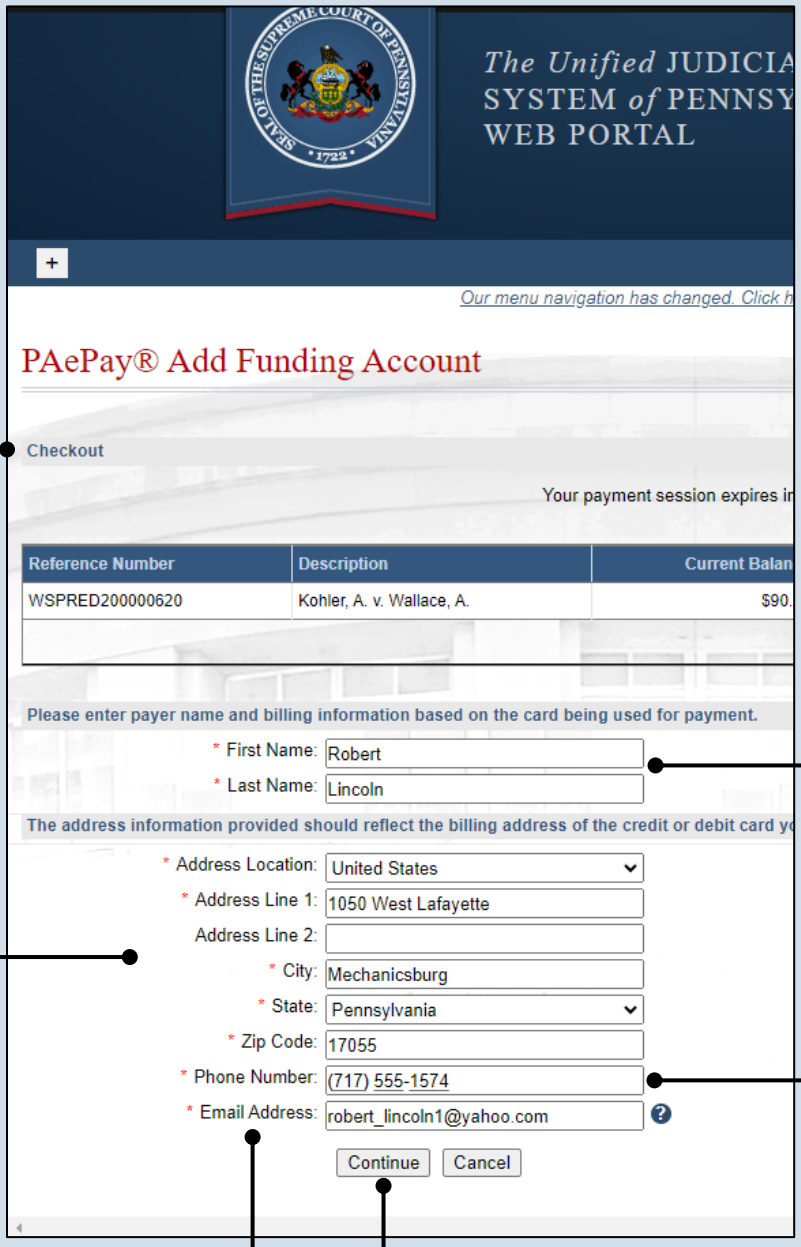
PACFile®

5. Review the billing information

The Checkout screen automatically displays the information of the person completing the filing.

If the billing information is correct, proceed to Step 10.

If the billing information is not correct, complete Steps 6-9 as needed.



6. Update the cardholder's name

In the Checkout screen, use the **First Name** and **Last Name** fields to enter the name that appears on the credit card being used for payment.

7. Update the billing address

In the **Address Line 1**, **Address Line 2**, **City**, **State**, and **Zip Code** fields, enter the address associated to the credit card being used for payment.

8. Update the phone number

9. Update the email address

All correspondence regarding the submission of the filing, including payment confirmation, will be sent to the e-mail address provided.

10. Click CONTINUE

How to Submit a Filing with a Fee and Make a Payment

PACFile®

11. Enter the credit card number

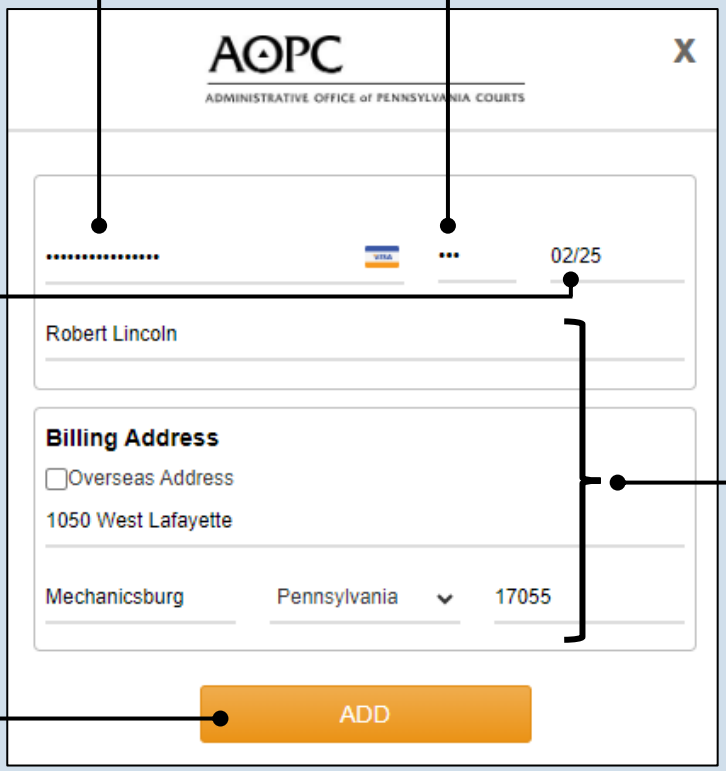
In the payment popup, enter the 16-digit number appearing on the front of your card. Do not enter any spaces between the numbers.

12. Enter the card's CVV code

Enter your CVV code based on the credit card type:

Visa, MasterCard, or Discover – The three-digit number on the back of the card next to the signature line.

American Express – The four-digit number that is printed (not embossed) on the front right of the card.



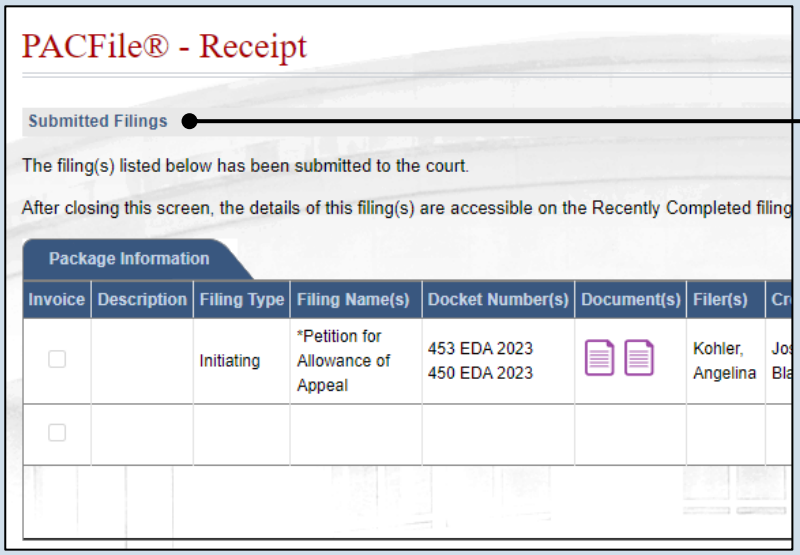
13. Enter the Expiration Date

Enter the month and and year the card will expire in an MM/YY format.

14. Verify the name and address information

15. Click ADD

Tip eService for any applicable participants or attorneys is performed immediately.



16. Process complete!

If you see the Submitted Filings screen, your payment was successful. Your credit card is not charged, however, until the filing is accepted by the court.

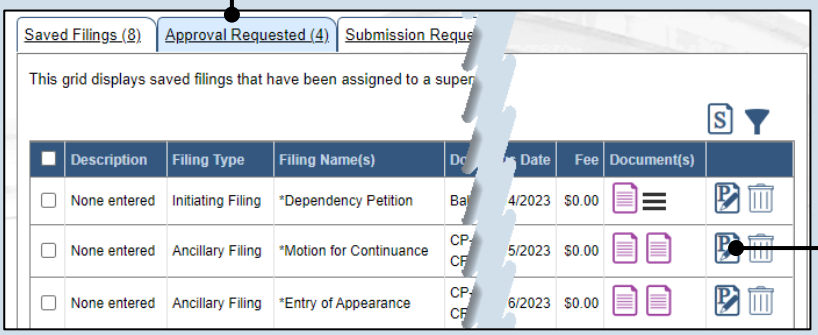
END

How to Approve, Submit, or Return a Filing

PACFile®

1. Access filings needing approval

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



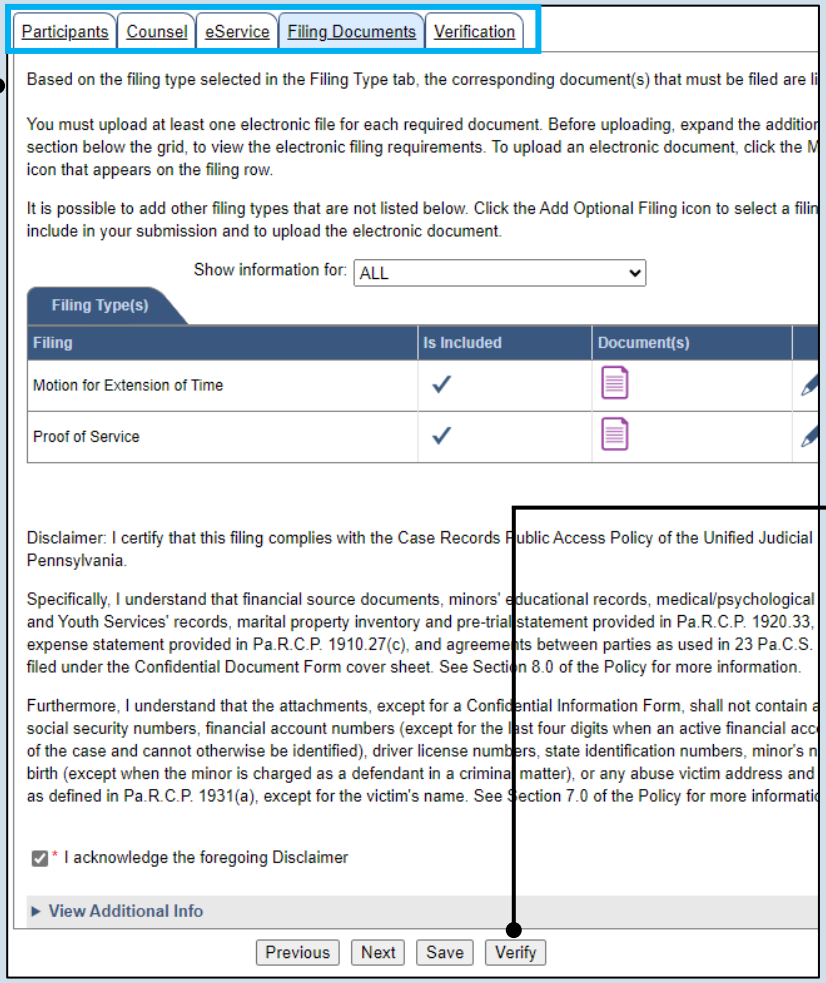
2. Open the filing

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).



4. Verify the filing

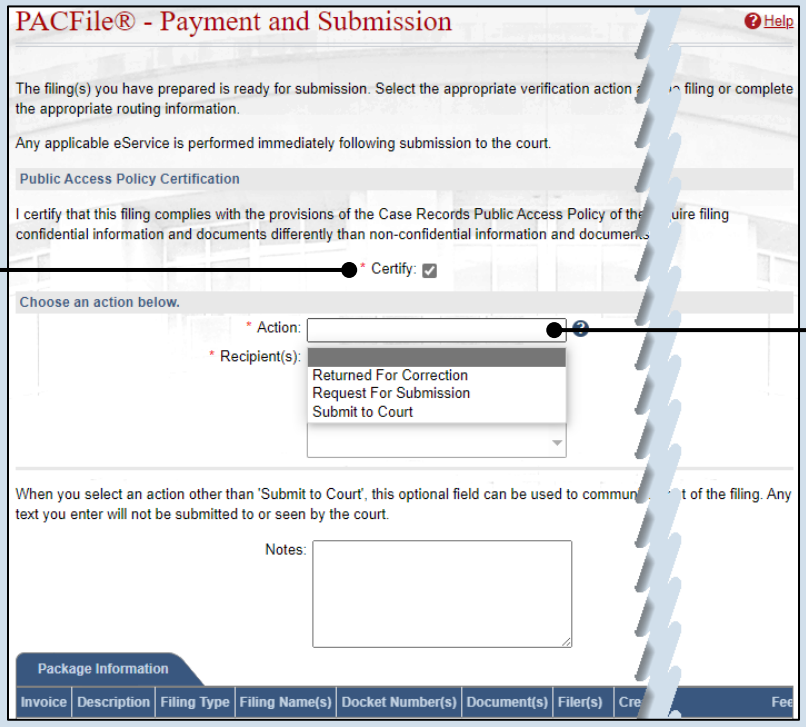
Click the VERIFY button. Complete this action regardless of your intent to approve, submit, or return for correction.

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



6. Choose an action

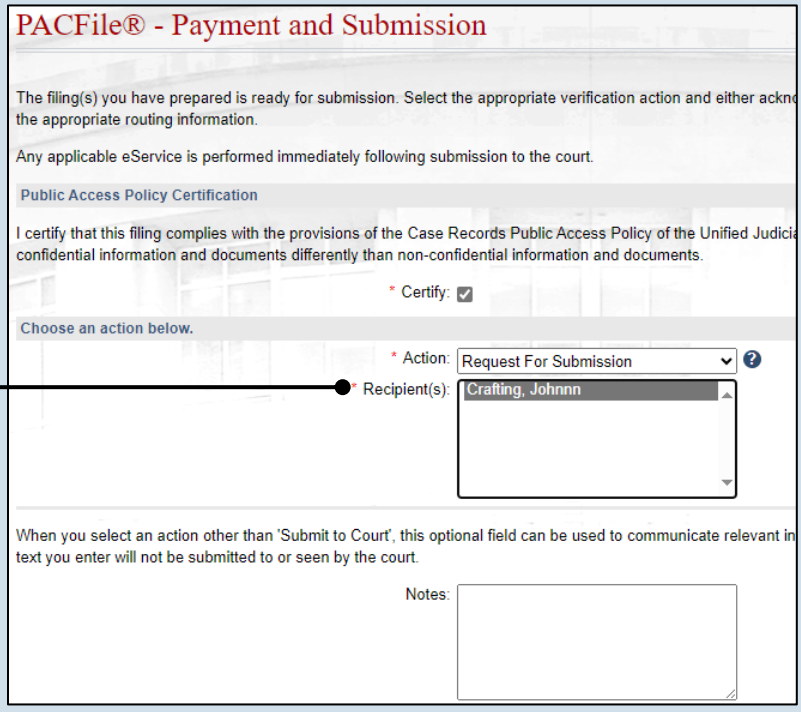
Select one of the following options from the **Action** field and proceed to the corresponding step:

- '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

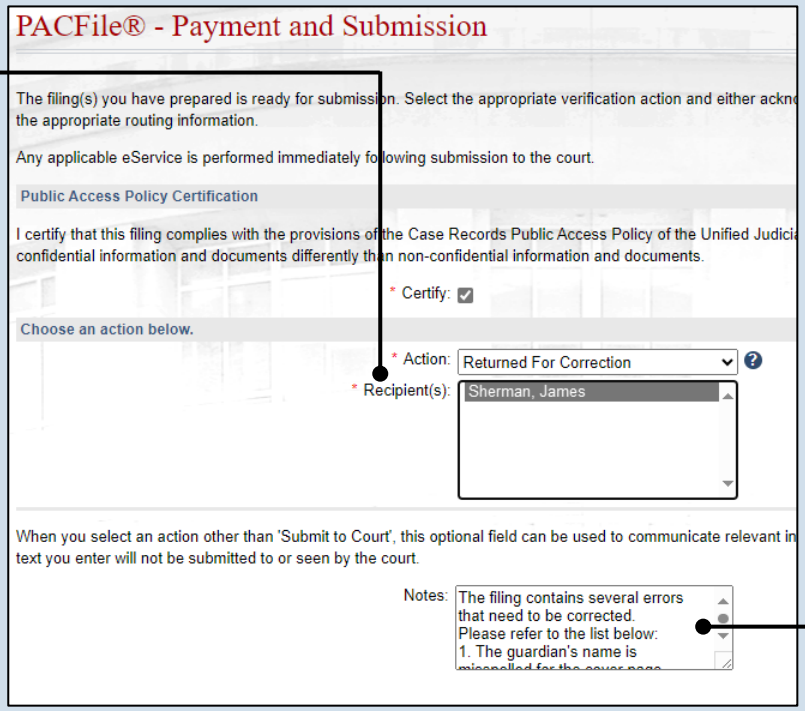
In the **Recipient(s)** field, select one or more of the individuals listed who have the authority to submit the filing to the court. Proceed to Step 10.



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

8. Select a recipient

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



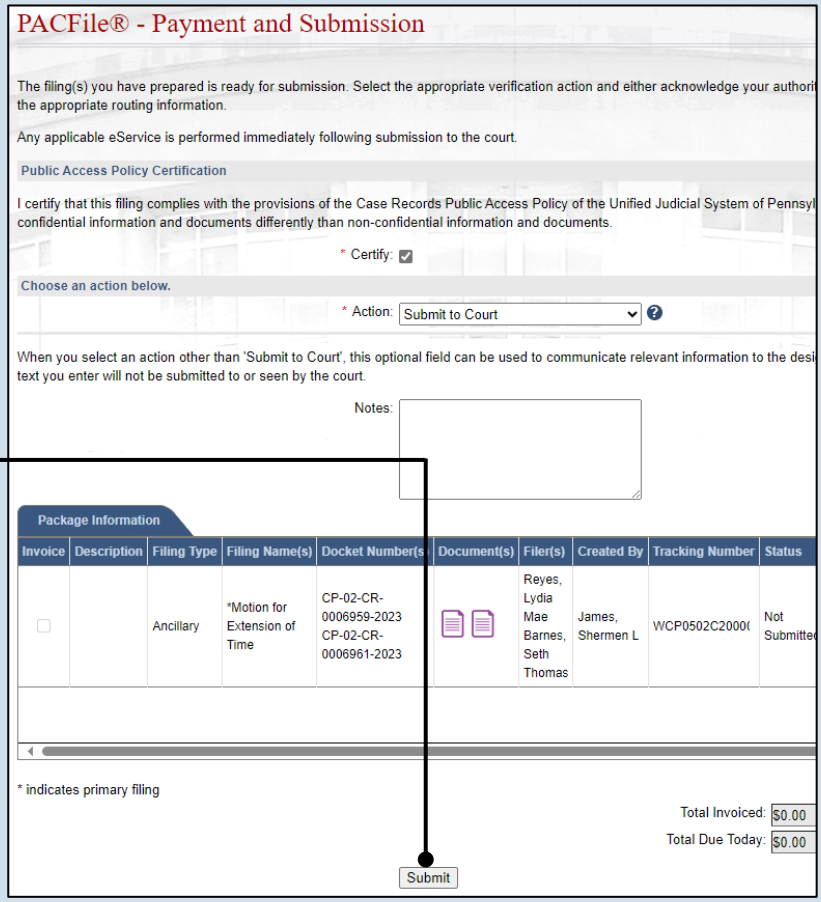
9. Enter notes

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.

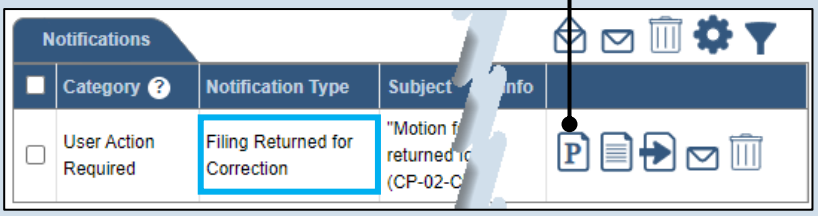


How to Correct and/or Submit an Approved Filing

PACFile®

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.



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.

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.

3. Click the VERIFY button



How to Correct and/or Submit an Approved Filing

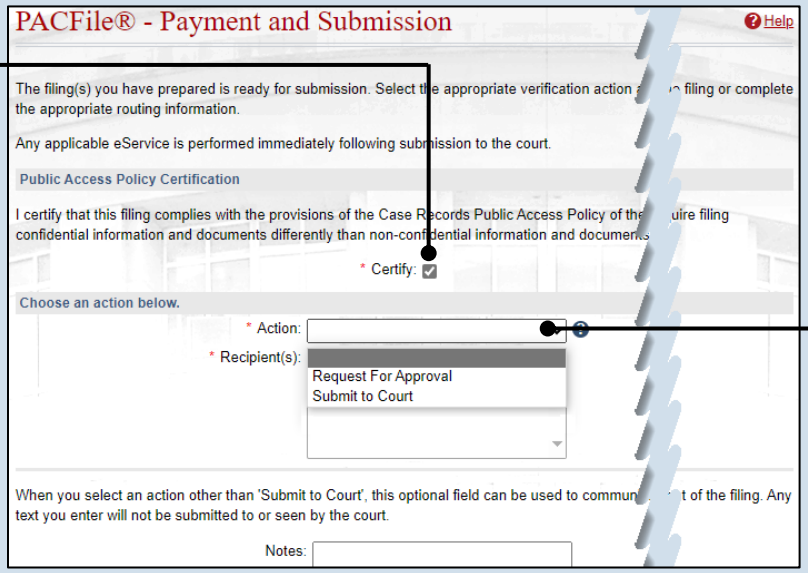
PACFile®

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



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.

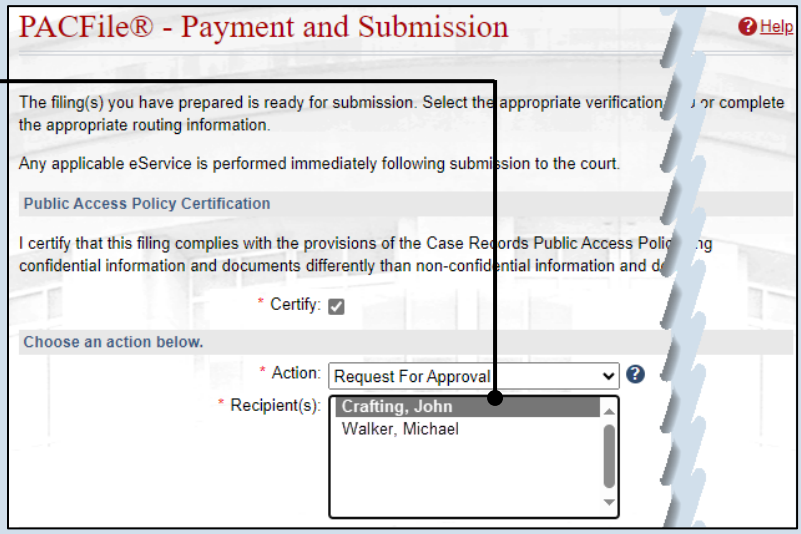
6. Identify an approver

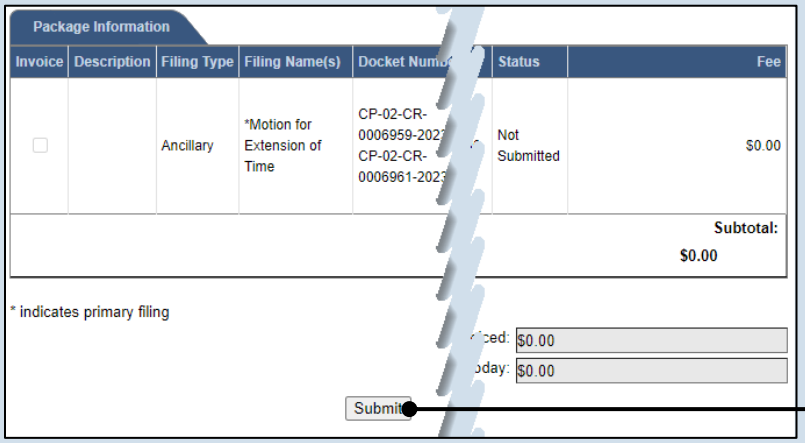
In the **Recipients** field, select one or more individuals who have the authority to approve the filing.

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).

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.





7. Click SUBMIT

This initiates the selected verification action.

END

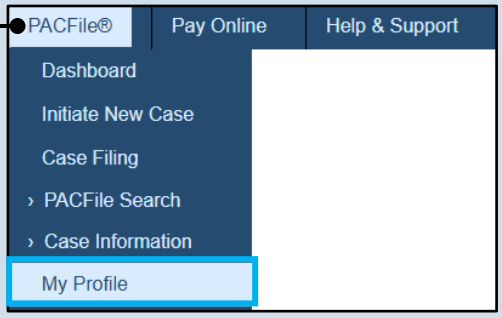
Proxying

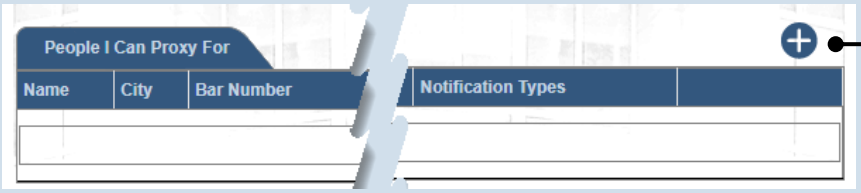
How to Request Proxy Rights

PACFile®

1. Open the My Profile screen

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



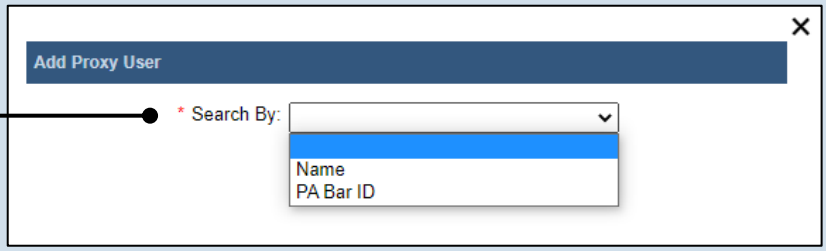


2. Click the Add New Record icon

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

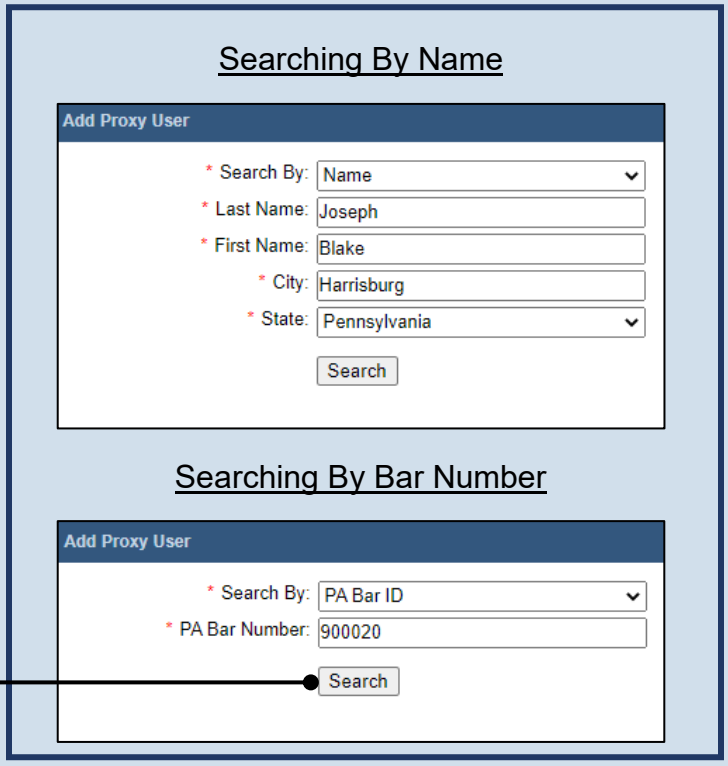
3. Select a Search Type

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.



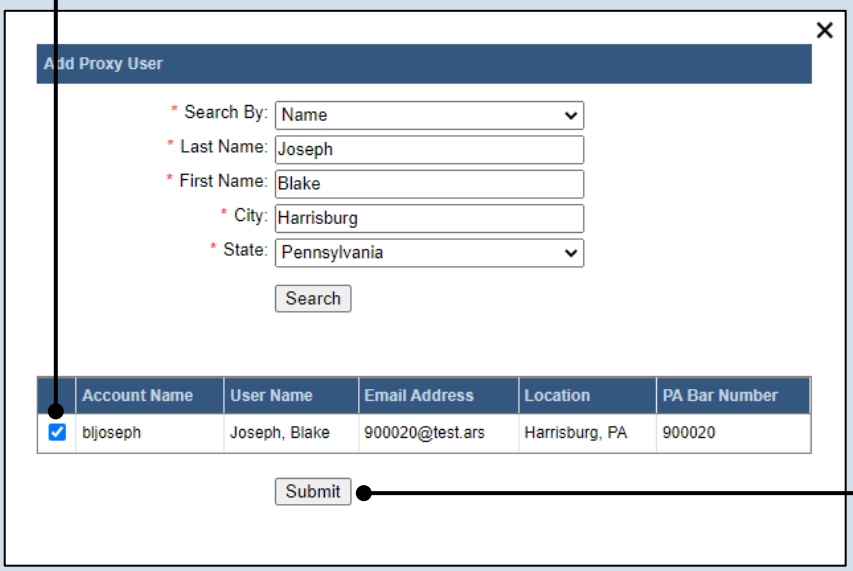
4. Enter your search criteria

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

5. Click SEARCH

6. Confirm the individual

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



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

PACFile®

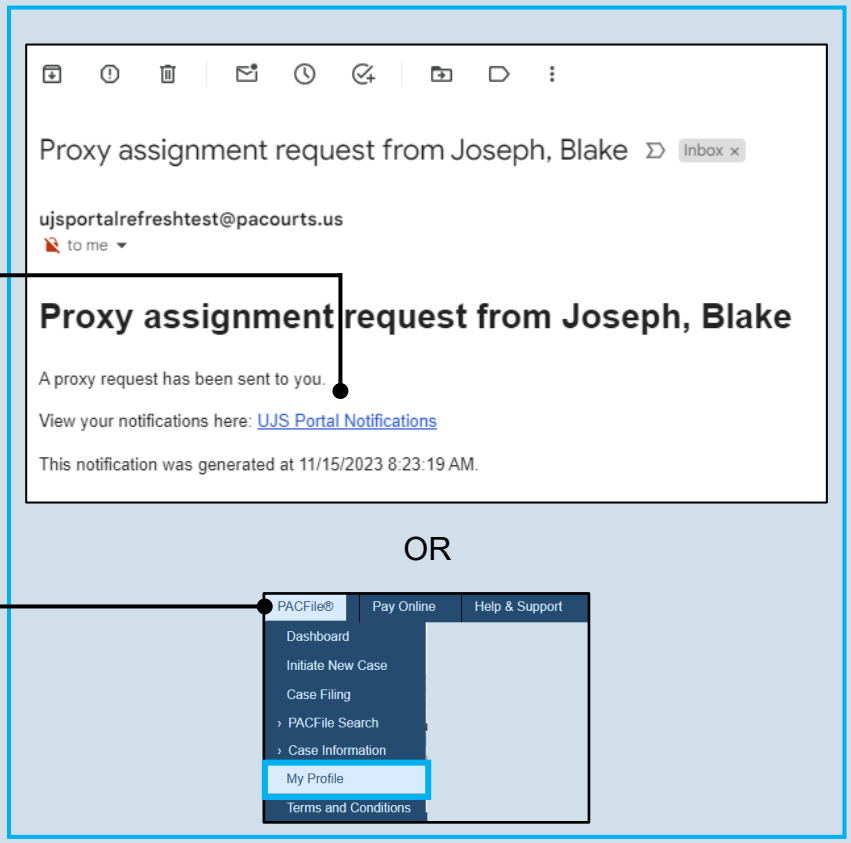
1. Open the My Profile screen

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.'



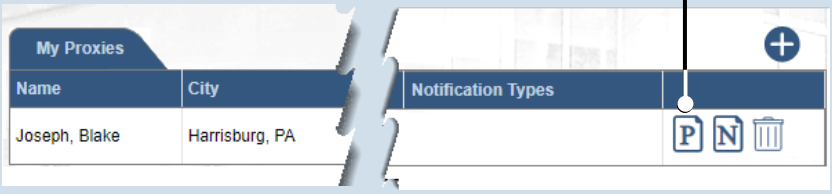


2. Assign proxy permissions

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

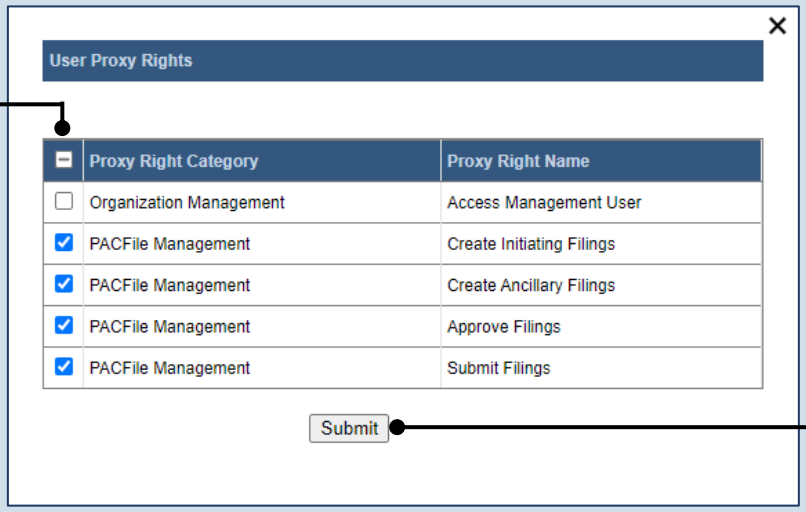
PACFile®

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).



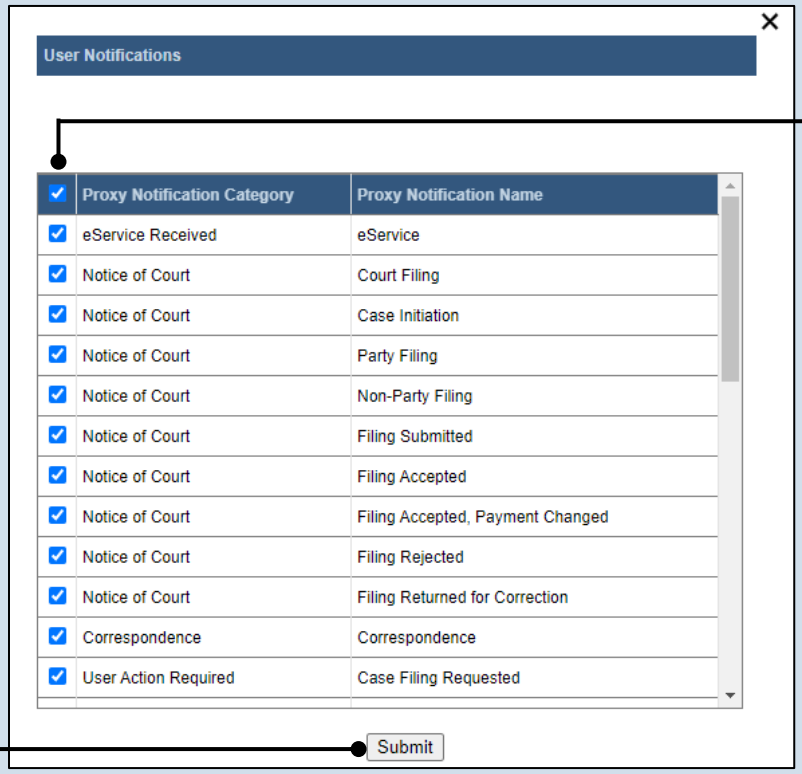
5. Click SUBMIT

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.

How to Assign Proxy Rights from a Request

PACFile®

➢ Proxy Right Definitions

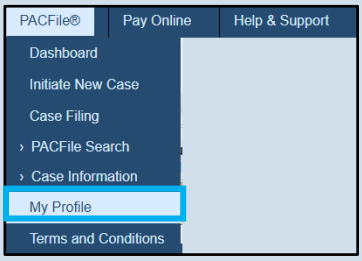
- **Access Management User** – Provides the authority to administer the privileges of your other proxies. Any proxy that is assigned this privilege does not have the authority to grant it to anyone else.
- **Create Initiating Filings** – Provides the authority to create a new case filing on your behalf. 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

PACFile®

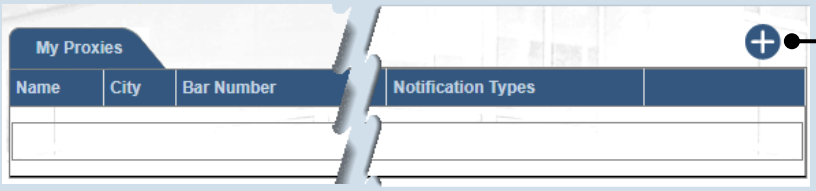
1. Open the My Profile screen

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



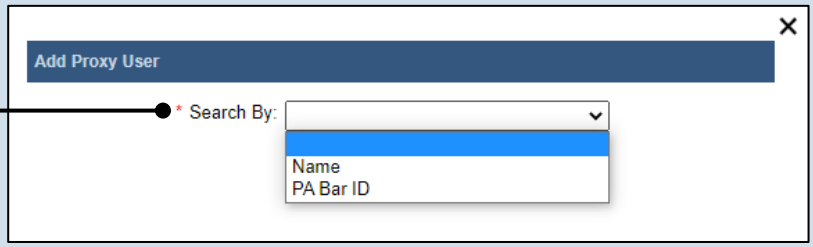
2. Click the Add New Record icon

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'.

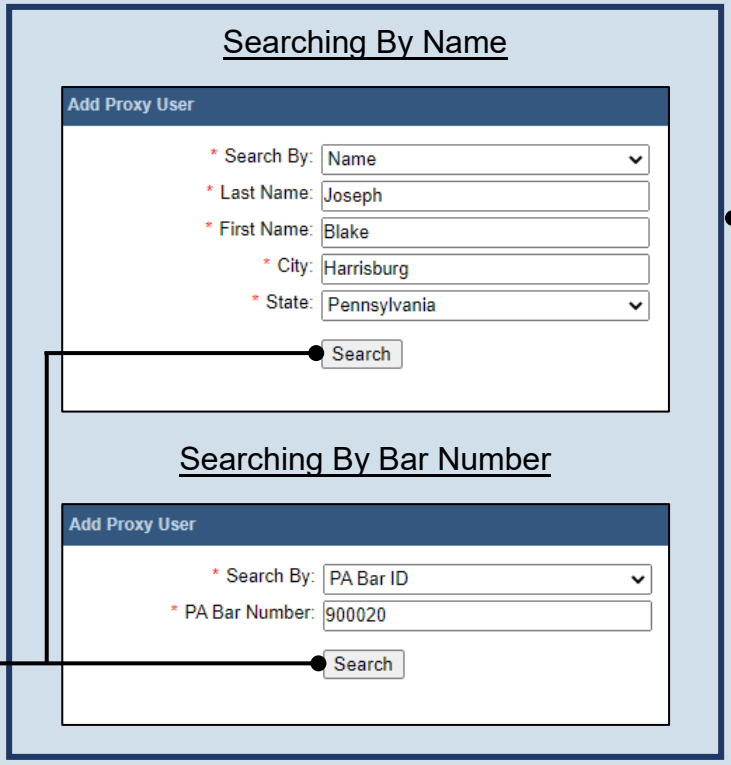


Tip You can use the 'Name' option to search for any attorney or non-attorney. The 'PA Bar ID' search only applies to attorneys and is only useful when you know their bar number.

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

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.

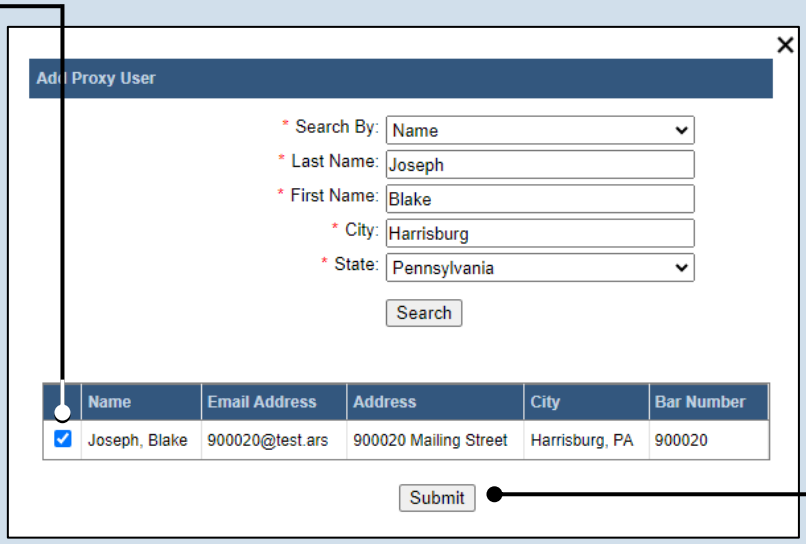
5. Click SEARCH

How to Assign Proxy Rights without a Request

PACFile®

6. Confirm the individual

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

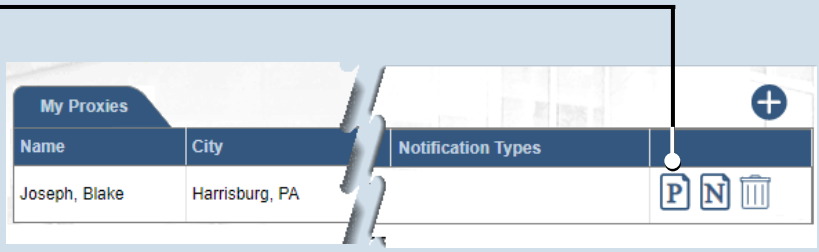


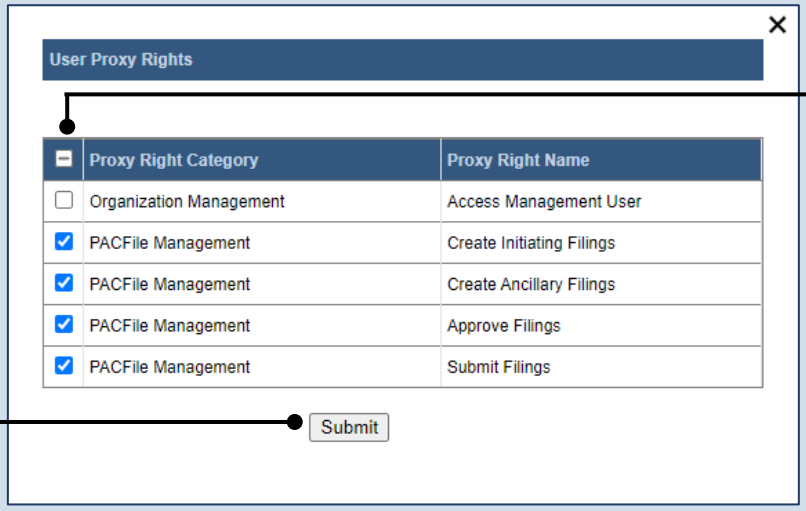
7. Click SUBMIT

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.





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.

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

10. Click SUBMIT

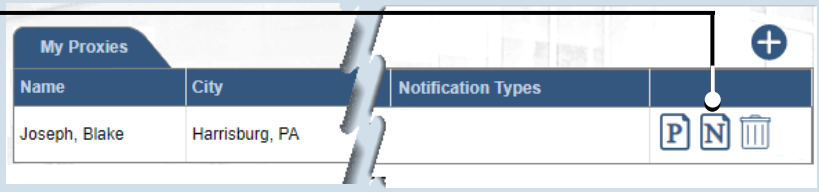
If a popup appears indicating that your changes have been saved, click the OK button.

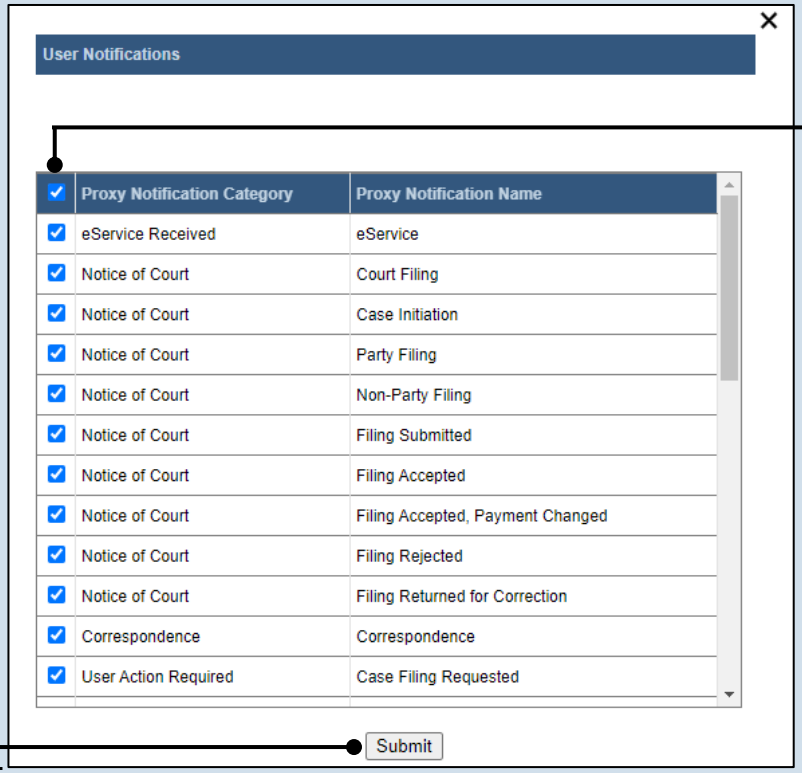
How to Assign Proxy Rights without a Request

PACFile®

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.





12. Assign proxy notifications

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

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

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

13. Click SUBMIT

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

➢ Proxy Right Definitions

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

END

Person-to-Person Proxy Notification Types

PACFile®

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.

Person-to-Person Proxy Notification Types

PACFile®

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.

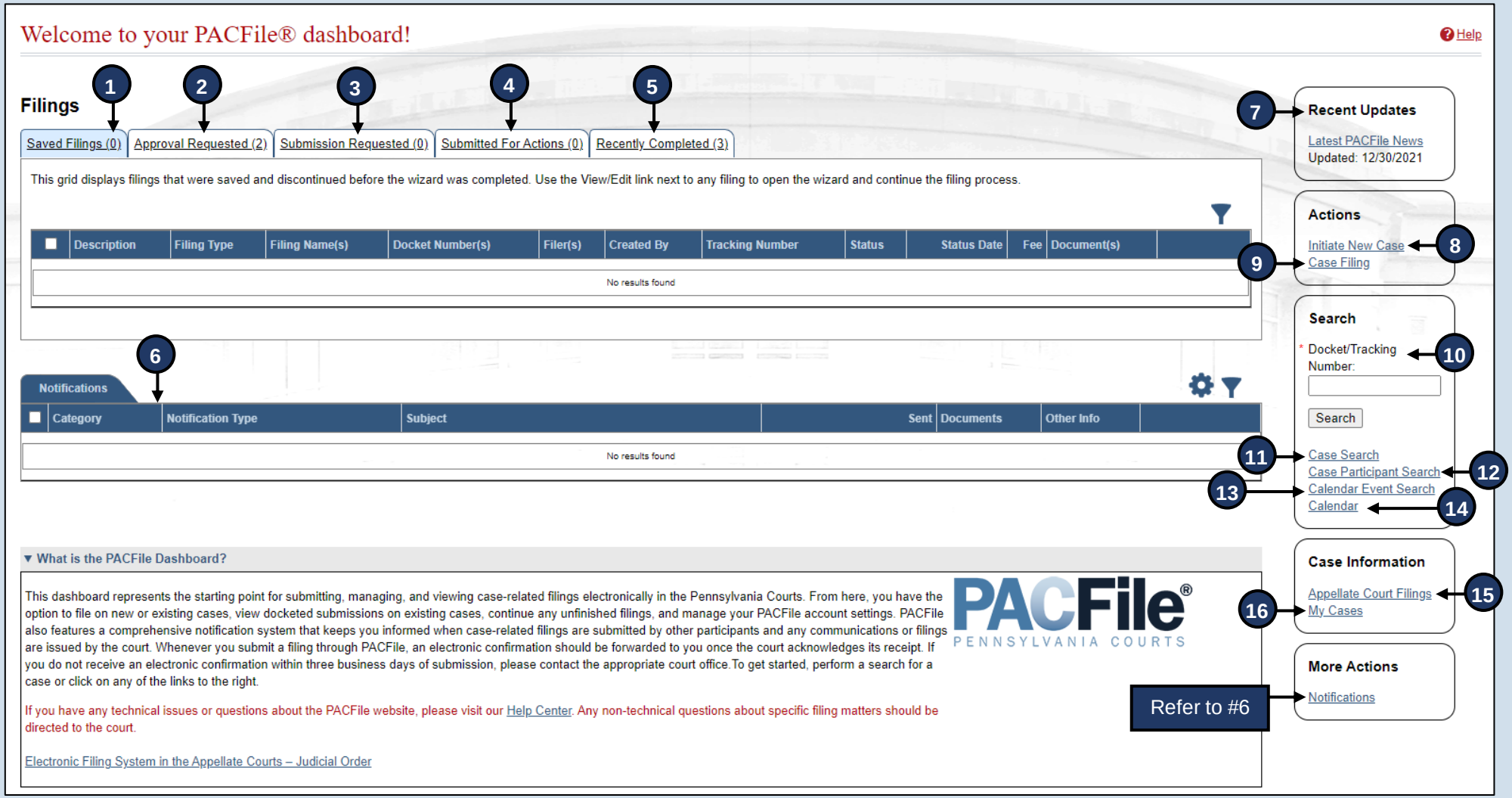
Miscellaneous

Dashboard Quick Sheet

PACFile®

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.



Dashboard Quick Sheet

PACFile®

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.

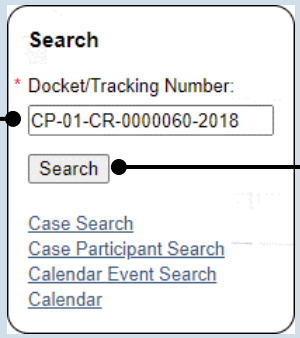
   Administrative – View notifications that define any situation where your ability to access and submit filings electronically has been affected.
7. **Recent Updates** – View the latest PACFile-related news from the Administrative Office of Pennsylvania Courts (AOPC). This information is made available 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.

Search for a case and view the Docket Entries

PACFile®

1. Search for the case

In the Search section of your dashboard, click in the **Docket/Tracking Number** field and enter the docket number of the case you want to view.

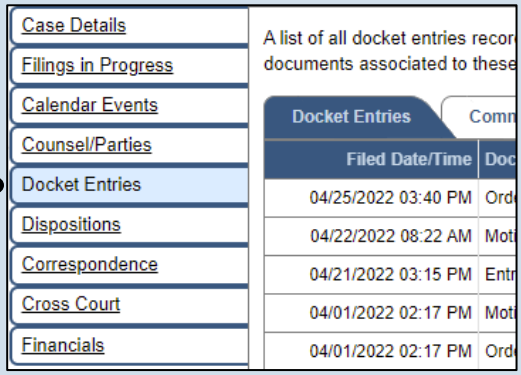


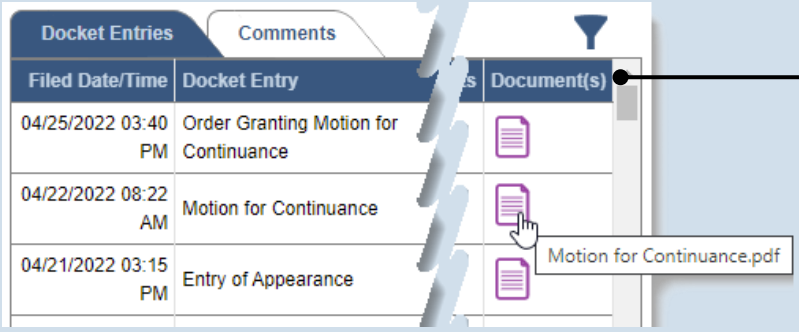
2. Click the SEARCH button

3. Click the Docket Entries tab

Clicking on this tab in the Case Details screen displays the docket entries for the case.

Tip See the descriptions of the additional tabs on the next page.





Tip Your ability to click on any of the icons in the **Document(s)** column is dependent on the docket type of the case, your connection to one of the case participants, and the role of that participant on the case.

Tip Hover over the Documents icon to display the name of the document.

➢ Other Case Details tabs

- **Filings in Progress** – View and continue any unsubmitted filings for the case that have been started and saved by either you or your proxy.
- **Calendar Events** – View a summary of the instances in which a case has been scheduled for session before the court.
- **Counsel/Parties** – View the names and contact details for the attorneys and pro se litigants listed on the case.
- **Dispositions** – View a history of all dispositional events on the case and the details of the disposition of every offence at each dispositional event.
- **Correspondence** – Provides access to the letters and other communications, excluding court orders, that the filing office has sent to the attorneys and pro se litigants on a case.
- **Cross Court** – View the list of lower court, Common Pleas, and Appellate court cases that make up the history of a case.
- **Financials** – View the list of financial penalties assessed on a case and payments applied to them.

View Document Service

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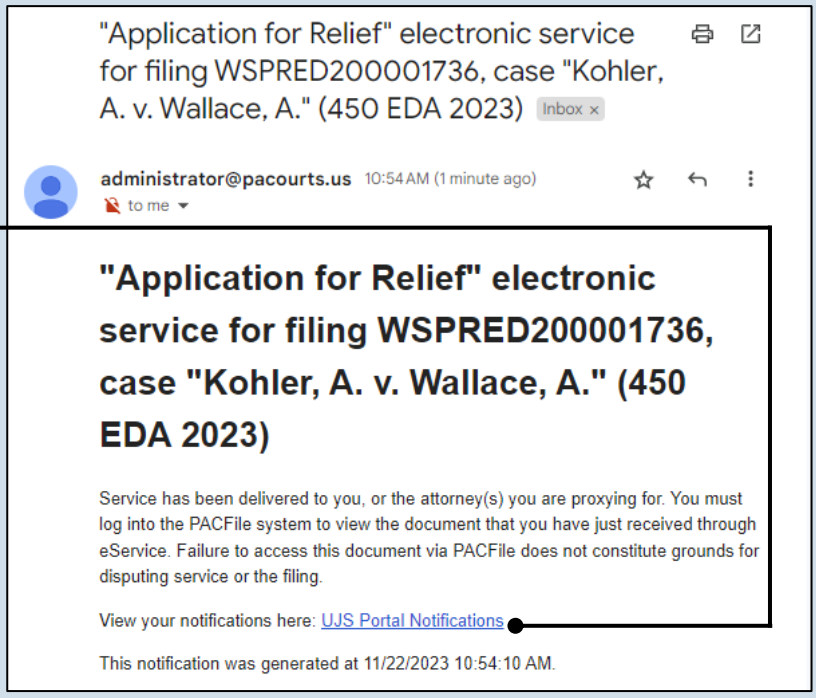
➢ Note:

This process begins with the expectation that you are logged into the e-mail account where you are designated to receive eService and that you have opened an e-mail from PACFile regarding electronic service.

1. Access PACFile through the e-mail notification

Click on the link within the notification.

Tip This picture displays an eService message opened through a Gmail account. E-mails regarding eService will provide the same information regardless of your chosen e-mail provider, but it may not look exactly like the image at right.



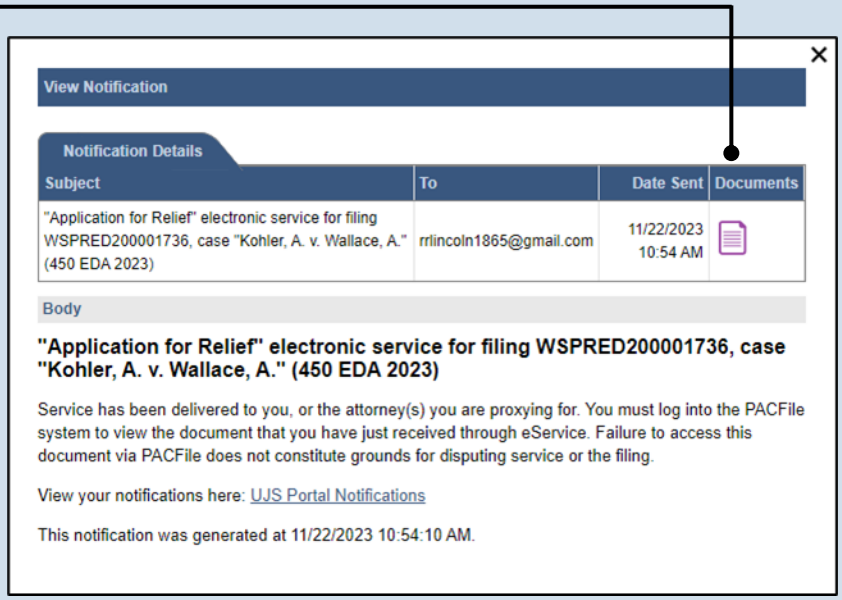


2. Log in to the UJS Web Portal

In the Account Login screen, enter your username and password and click the LOGIN button to access PACFile.

3. Open the eService documents

In the View Notification screen, click on any of the available Document icon(s) associated to the notification.



Tip Hover your mouse pointer over an icon to view the corresponding document's name.

Tip All documents will open within a separate window.

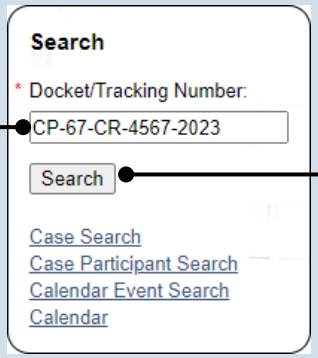
Subscribe to Case Notifications

PACFile®

1. Search for the case

In the Search section of your dashboard, click in the **Docket/Tracking Number** field and enter the docket number of the case you want to view.

Tip You can only subscribe to notifications on a case-by-case basis.



2. Click SEARCH

Tip Some cases are considered secure and may not be returned in these searches even with the correct docket number. Your ability to locate these cases is dependent on your (or your organization's) relationship to the case.

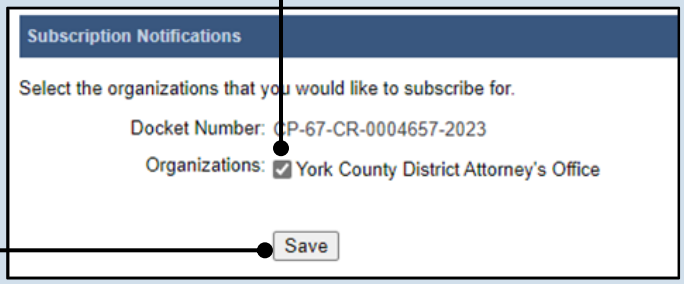
3. Subscribe to notifications

On the Case Details screen, click on the Subscription Notifications icon.

Tip Subscribing to a case means that you will receive all the dashboard and e-mail notifications that that organization is eligible to receive on the case.



4. Select notification subscriptions



On the Subscription Notifications popup screen, select the checkbox or checkboxes that appear next to the organizations you proxy for that require notifications for the case.

5. Click SAVE

END

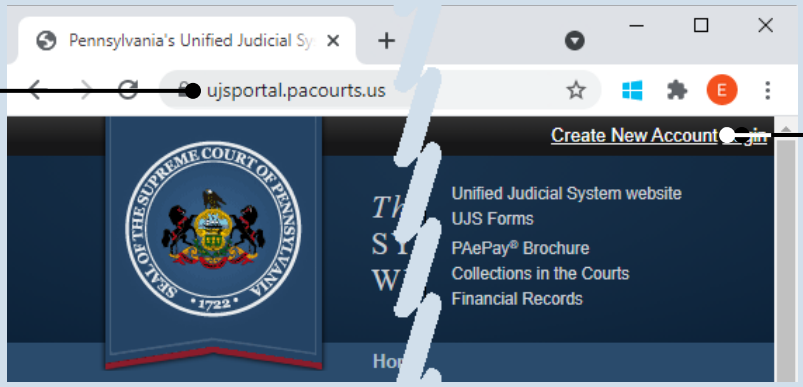
How to Create Your Own UJS Web Portal Account

PACFile®

1. Access the UJS Web Portal

In the address bar of your internet browser, enter https://ujsportal.pacourts.us and press the *[ENTER]* key.

Tip Any individuals who already have a UJS Web Portal account for the use of the Attorney Registration or Secure Web Docket service can use the same account for PACFile.



2. Start the account registration process

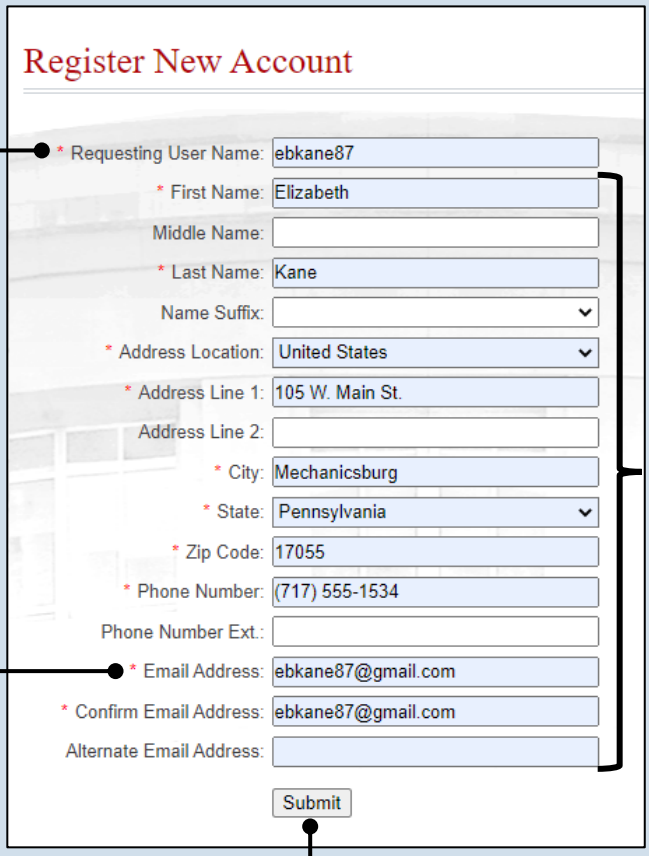
On the UJS Web Portal homepage, click the *Create New Account* link in the upper-right corner of the screen.

3. Choose a User Name

On the Register New Account screen, enter a username of your choosing. This must be at least three characters long.

Tip User names cannot be duplicated and a message will display after Step 5 if the one you chose is already in use.

Tip The **Email Address** field should contain your personal or work e-mail address for the receipt of PACFile notices. The **Alternate Email Address** field can be used for any other e-mail address, yours or someone else's, where you would like to have your PACFile-related e-mails forwarded.



4. Enter your personal information

You must complete all fields with an asterisk or star (*).

Tip Any address you enter here will appear as your default billing address when you complete the PACFile payment process. This address is also used for any PACFile-created proofs of service that list your mailing address.

Tip When making a payment, you will be able to substitute a different address during checkout.

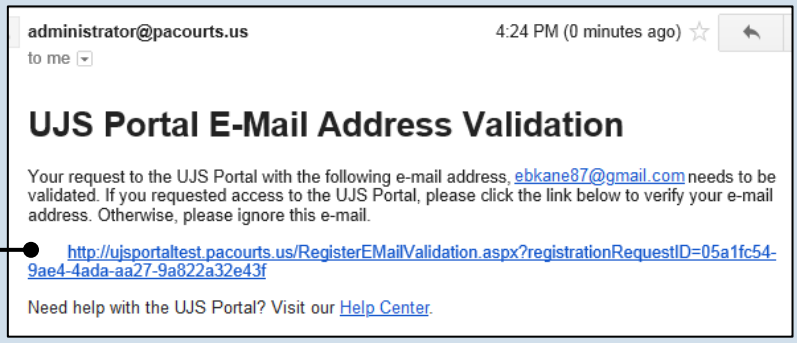
5. Click SUBMIT

How to Create Your Own UJS Web Portal Account

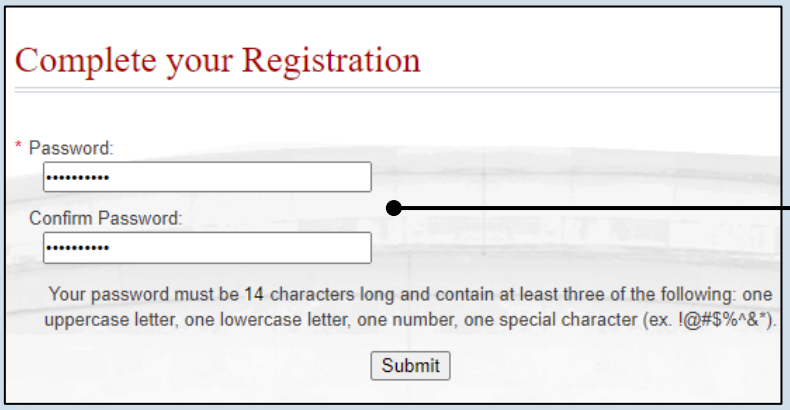
PACFile®

6. Confirm your e-mail address

An e-mail from administrator@pacourts.us will be sent to the address you provided. You need to access your e-mail account and click on the link the e-mail contains.



Tip You should receive this e-mail within 15 minutes. Check your Junk or Spam folders if it does not appear within that time.



7. Create your password

On the Complete your Registration screen, enter a password and then confirm it by entering it again.

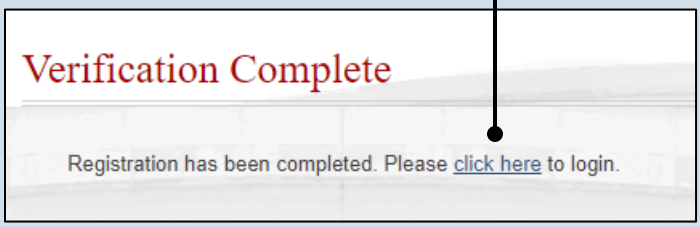
Click the SUBMIT button.

Tip Your password must meet the requirements specified onscreen.

8. Open the Login page

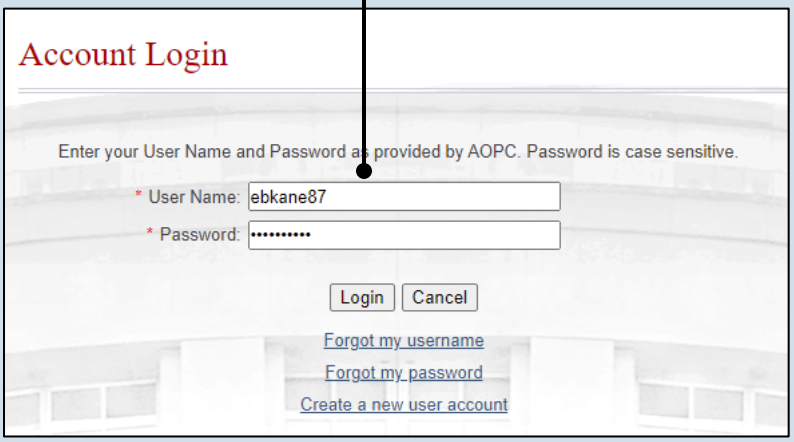
Your account has been created successfully.

In the Verification Complete screen, click the click here link.



9. Log in with your new account

In the Account Login screen, enter the user name and password you just created and click the LOGIN button.



10. Need to add a role?

If you are an attorney or police officer, continue to Step 11.

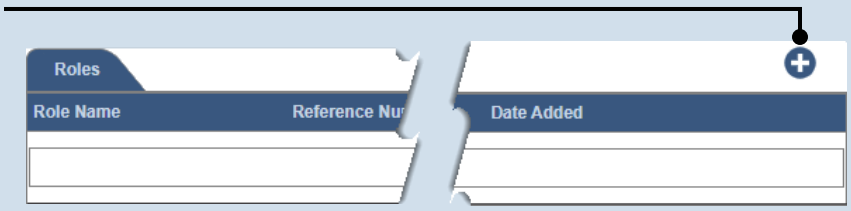
For everyone else, you do not need to add a role. **Congratulations!** This process is complete.

How to Create Your Own UJS Web Portal Account

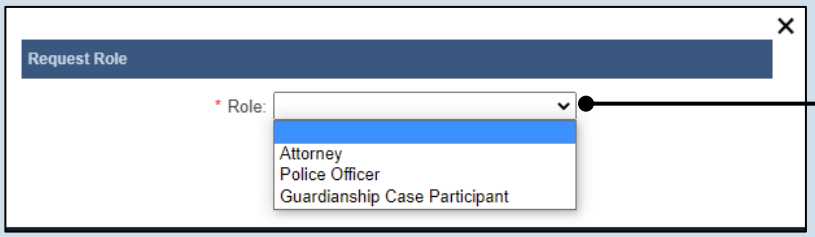
PACFile®

11. Open the Request Role screen

In the Manage Account screen, click on the Add New Record icon above the Roles grid.



Tip If this screen does not appear after completing Step 9, hover over the My Account menu and click the 'Manage Account' option.



12. Choose a role

In the Request Role popup, click on the **Role** dropdown and select your role.

If you selected 'Attorney', continue to Step 13.

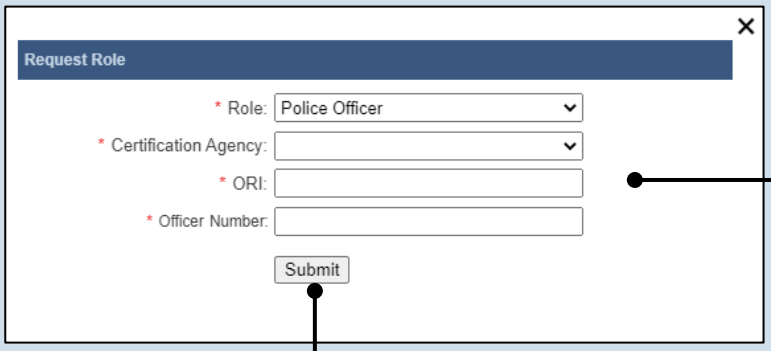
If you selected 'Police Officer', proceed to Step 14.

13. Enter your Personal ID Numbers

Enter your state bar number and the last four digits of your social security number in the fields provided. Proceed to Step 15.

Tip This information is necessary to verify your identity and to grant you, or anyone you identify as a proxy, the ability to file on the cases on which you are participating.





14. Enter your Personal ID Numbers

Enter your certification agency, ORI, and officer number in the fields provided.

Tip This information is necessary to verify your identity so you can file on the cases on which you are participating.

Tip For most police officers, your officer number is your PSP or MPOETC assigned ID.

15. Click SUBMIT

END

Need Additional Help?

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

or

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

AOPC