MONROE COUNTY, PA E-FILE USER GUIDE

E-FILING USER GUIDE



1

CONTENTS

E-Filing User Guide	1
About this document	3
Intended readership	3
In this guide	3
Monroe County Contact Information	3
Chapter 1 Electronic Filing	5
C-Track CMS E-Filing functionality	5
1.1 E-File Overview and Registration	5
1.2 User Administration and Add Support Staff	13
1.3 Navigation, Dashboard Widgets and Switch User Association	16
1.4 E-Filing Notifications	22
1.5 Legal Organization Administration	25
1.6 Create a New Case E-Filing	36
1.7 Submit an E-Filing on an existing case	36
1.8 Support Staff Completes a Draft Filing	66

ABOUT THIS DOCUMENT

INTENDED READERSHIP

This document serves as a guide to registering and using the Monroe County C-Track E-Filing portal.

IN THIS GUIDE

The aim of the guide is to provide step-by step process instruction for users with appropriate privileges to create, edit, and submit electronic case filings from a remote computer to the Monroe County Office of the Prothonotary ("Prot") and to manage their C-Track E-Filing account. The guide includes Legal Organization Administration functionality to add and remove authorized E-filers to Legal Organizations (Law Firms).

MONROE COUNTY CONTACT INFORMATION

Office of the Prothonotary E-mail: protcivilfiling@monroecountypa.gov

Office of the Prothonotary Phone: 570-517-3370



ATTENTION

SERVICE OF ORIGINAL PROCESS

IF YOU ARE FILING A WRIT OR COMPLAINT WHICH IS CONSIDERED ORIGINAL PROCESS UNDER PA RULE OF CIVIL PROCEDURE 400 AND REQUIRES SERVICE BY THE SHERIFF, PLEASE BE ADVISED THE MONROE COUNTY OFFICE OF THE PROTHONOTARY ("PROT") WILL NOT ELECTRONICALLY TRANSFER YOUR PLEADING TO THE SHERIFF'S OFFICE FOR SERVICE.

IF YOU RECEIVE A NOTICE FROM THE PROT THAT YOUR FILING HAS BEEN APPROVED AND DOCKETED, <u>YOU STILL MUST MAKE</u> <u>ARRANGEMENTS WITH THE SHERIFF'S OFFICE TO HAVE ORIGINAL</u> <u>PROCESS SERVED</u> PURSUANT TO THE PENNSYLVANIA CIVIL PROCEDURE RULES, PART 1: SERVICE OF ORIGINAL PROCESS, SUB-PART A: SERVICE GENERALLY Pa.R.C.P 400 – 405 and/or SUB-PART B: SERVICE IN PARTICULAR ACTIONS Pa.R.C.P. 410-412 ; SUB-PART C: SERVICE UPON PARTICULAR PARTIES Pa.R.C.P 420-425; SUB-PART D SERVICE PURSUANT TO SPECIAL ORDER OF COURT Pa.R.C.P 430; PART II, SERVICE OF LEGAL PAPERS OTHER THAN ORIGINAL PROCESS Pa.R.C.P 440-44



CHAPTER 1 ELECTRONIC FILING

C-TRACK CMS E-FILING FUNCTIONALITY

1.1 E-File Overview and Registration

Electronic Filing offers the opportunity to open a new case filing or electronically file and transmit documents to the Court for an existing case, using a remote computer. E-Filing requires the completion of a registration form and may or may not require the successful completion of a test, depending upon the business process of the Court(s) to which you E-File. Additionally, you need an active email account to complete the registration process. You submit the registration and receive an email which provides a link to access the C-Track E-Filing web site.

For Efilers who are attorneys, you may have a legal organization, such as a law firm, to which you can associate an E-Filing account. Legal Organizations are useful for instances where another registered user submits filings on your behalf or where attorneys or authorized E-Filers may need to view filings submitted by other E-Filers of the same Legal Organization. When a registered E-Filer is associated to a Legal Organization, the user can switch associations from their personal E-File account to the Legal Organization to which they are associated. Support Staff can also be included as Legal Organization members. Attorneys can associate Support Staff through the User Association screen. Support Staff are able to file on behalf of an authorized attorney Efiler.

You may access the E-File Registration / Log In screen from another web site, such as a State or County site, which directs you to the web location or Universal Resource Location (URL) for C-Track E-Filing.

NOTE: To review the Terms and Conditions for using the E-Filing site click the E-Filing Terms & Conditions link on the Log In screen.

The **E-File User Access** image below demonstrates security constraints E-File users face when included and not included on the E-File User Access List for a given case. The E-File User Access List is a list of E-File users that belong to a case on Monroe County's CMS application. To gain access to the List, a user must file onto a case and have it accepted/docketed by the Prot. Once docketed, the filing attorney (whether the attorney files the document themselves or Support Staff files on their behalf) will be added to the E-File User Access List.

Users within the same Law Firm can also gain access to the E-File User Access List if they are a Support Staff member supporting an Attorney who already belongs to the List by making a request to the Prot.

The image below demonstrates the functionality of the E-File User Access List relative to searching and filing on a case based on the case being a public or confidential record.

		Public Case	Confidential Case
	Search / Access Case	×	×
User Not on EF User Access List	E-File into Case	0	×
User on EF User Access List	Search / Access Case	0	0
	E-File into Case	0	0

In this example, we register as an e-filer.

1. From E-File Registration / Log In screen, click Register as an E-Filer.

Login	
Username	
Password	
	Login
Forgot Passw Register as an E-Filing Term	
	ng, developed by Thomson Reuters Cour

Fig. 1.1: E-File Registration / Log In screen

The E-File Registration screen appears.



MONROE COUNTY, PENNSYLVANIA CIVIL E-FILING

1	Information
	I hereby expressly consent to receive any and all notices or other communications from the Office of the Prothonotary, and the Court of Common Pleas of Monroe County, via email at the email address in my user profile pursuant to PaRCP 205.4 and 238, and all applicable Monroe County Local Rules. This constitutes my written request for such notifications in accordance with Rule 238(d).
	If you have never filed in Monroe County before, you must first email us at protoivifiling@monroecountypa.gov to be listed in our Case Management System first.
	Once you have submitted this information, a confirmation email will be sent.
	PLEASE REGISTER ONE TIME. If you are unsure if you are registered please contact the Court.
	For questions regarding e-filing, during work hours, call 570-517-3370. You may also email us at any time at protoivilfiling@monroecountypa.gov.
-Fil	e Registration ?
тү	PE -
Ţ	Vper 🚱 🗸 🗸
US	ER INFORMATION -
P	Prefix Username*
L	Last Name* Password*
F	First Name* Confirm Password*
N	Middle Name
s	Suffix
со	NTACT ~
	rimary E-mail* 🔞
AD	DRESS -
	Address Type 🚷 Mailing 🗸
	Address Line 2
	Address Line 3
	Address Line 4
	Country United States
	jity' State* Zip Code
	PA V
-	
LE	GAL ORGANIZATION ASSOCIATION
Le	gal Organization Name Role E-mail Status
	records were found.
Ade	d Legal Organization
VE	RIFICATION -
	I'm not a robot
	reCAPTCHA Prices Tama
L	
	RMS AND CONDITIONS -
	I agree to the terms and conditions.
	Next

C-Track™ E-Filino, developed by Thomson Reuters Court Management Solutions

Fig. 1.2: E-File Registration screen

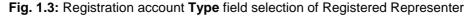
The E-File Registration screen has seven containers.

In the Type container:

1. Select the Account Type.

If you are an attorney registered with the Bar, select the Registered Representer option. The Attorney Bar ID field appears.

E-File Registration			
TYPE -			
Туре* 🕜	Registered Representer V	Attorney Bar ID*	



In the User Information container:

- 2. Enter a User Name.
- 3. Enter a Last Name.
- 4. Enter a First Name.
- 5. Enter a **Password**.
- 6. Confirm Password.

In the Contact container:

- 7. Enter a Primary E-mail.
- 8. Click Add Contact to enter additional email addresses, as needed.

In the **Address** container:

- 9. Select the Address Type.
- 10. Enter Address Line 1.
- 11. Enter City.
- 12. Select State.
- 13. Enter Zip Code.
- 14. If you are associating your registration with a Legal Organization, such as a registered Law Firm, click Add Legal Organization.

The Legal Organization Search window appears.

Add Legal Organiza	tion Association			2 ×
LEGAL ORGANIZATIO	N SEARCH -			
Name Contains		Show Inactive		
LEGAL ORGANIZATIO	DNS			
Name	_	Address		Active
No records were found.				
			Search	Cancel
			_	

Fig. 1.4: Legal Organization Search window

15. Enter search criteria.

16. Click Search.



Add Legal Organiz	ation Association		_	2 x
LEGAL ORGANIZATI	ON SEARCH -			
Name Contains	weit	Show Inactive		
LEGAL ORGANIZATI	ONS			
Name	0 Livefin on	Address		Active
Weitzmann, Weitzmann	i, & Huiiman	333 Main St Stroudsburg PA 18360		Ŷ
1 to 1 of 1 records				
			Search	Cancel

Fig. 1.5: Legal Organization Search window - search results returned

NOTE: If the Legal Organization to which you belong is not returned in a search, you must contact the Prot.

17. Click the line item **Name** of the Legal Organization to which you are associating your E-Filer registration, if applicable.

The User - Legal Organization Details window appears.

LEGAL ORGANIZATI	ON SEARCH -		
Name Contains	cop	Show Inactive	
LEGAL ORGANIZATI Name	ONS User-Legal Or	ganization Details	
Copen and Shore	USER-LEGAL C	RGANIZATION DETAILS ~	.
1 to 1 of 1 records	Service E-Ma	Attornout	5

Fig. 1.6: Legal Organization Search window - Organization Details

Here, your Role determines what functions you can access in E-File and, for your Court, are defined as:

Attorney - selected by users with a valid Bar ID who use the application to submit E-Filing on new and existing cases **Support Staff** – selected by users without a Bar ID who can submit E-filings on behalf of Attorneys

9

Legal Organization Admin^{**} - selected by users with a valid Bar ID who use the application to submit E-Filing on new and existing cases as well as add and remove user access for other e-filers of the organization.

Non-Filing Legal Organization Admin** - selected by users who do not submit e-filings themselves or on behalf of anyone else. This role lets users add and remove user access for other e-filers of the organization.

****Please note**: you will need to contact the Prot and identify at least one person in your organization to be a Legal Organization Admin or Non-Filing Legal Organization Admin prior to having anyone else attempt to add your law firm as a Legal Organization.

- 18. Select a Role.
- 19. Enter a Service Email.
- 20. Click **Add Another** to enter additional email accounts associated to your registration and the Legal Organization, as needed. If you add a support staff email address, that individual is required to complete the E-Filing Registration and associate to your account through the Legal Organization functionality.
- 21. Click Save.

In the Verification container:

22. Enter Verification from the Captcha container.

In the Terms and Conditions container:

- 23. Click the **I agree** check box.
- 24. Click Next.

An Information message appears and directs you to check your primary email to complete registration.

С	-TRACK E-FILING	YOUR NAME WILL APPEAR HERE 🗣			
0	Information				
	You are currently pending user approval. Please check the primary e-mail you entered during registration for further instructions.				
	C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions				

Fig. 1.7: Information message

- 25. Log into the email account that you entered on the Registration form.
- 26. Open the email from the E-File site.
- 27. Click the link provided in the email. The link will appear similar to the figure below.



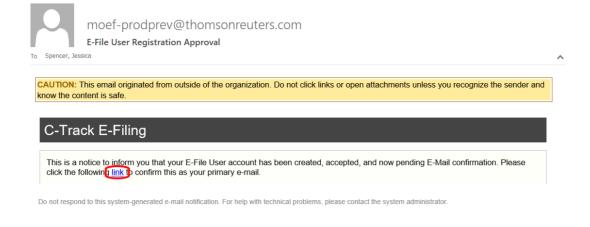


Fig. 1.8: C-Track E-Filing Email example

A Browser window opens and navigates to a secure C-Track E-Filing Login screen.

MONROE COUNTY, PENNSYLVANIA CIVIL E-FILING

Login	
Username	
Password	
	Login
Forgot Passv	vord?
Register as a	n E-Filer
E-Filing Term	s & Conditions
C-Track™ E-Fil	ing, developed by Thomson Reuters Cou Management Solutions

Fig. 1.9: C-Track E-Filing Login screen

- 28. Enter Username.
- 29. Enter Password.
- 30. Click Login.

Please see the Helpful Links to access Monroe County Forms, Rules and AOPC information.

The **C-Track E-Filing Home** screen appears and your registered first and last name display in the top right header of the

Disclaimer: This Thomson Reuters document has been modified by the customer from its original state.

Home screen banner.

Case Search	MONROE COUNTY, PENNSYLVANIA CIVIL E-FILING Jessica Sp	encer	
Create Filing			
Filings •	Home		? 🖸
			\$
	C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions PayPal		

Fig. 1.10: C-Track E-Filing Login screen

31. Should you forget your password, click the Forgot Password? link on the C-Track E-Filing screen.

Monroe County, Pennsylvania Civil E-Filing				
	Login			
	Username			
	Password			
	Login			
	Forgot Password? Register as an E-Filer			
	E-Filing Terms & Conditions C-Track™ E-Filing, developed by Thomson Reuters Court			

Fig. 1.11: C-Track E-Filing Login screen – Forgot Password?

Management Solutions

The Forgot Password Information message and Password Reset Request container appear.

C-TRACK E-FILING	
Forgot Password? Please enter your e-mail address used to sign up for the account and an e-mail will be sent to you containing further instructions to reset your password.	
Password Reset Request E-mail	?
	Request New Password Cancel
C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions	



- 32. Enter the email address you provided on the Registration form.
- 33. Click Request New Password.

An email is sent to the email account on file. Follow the instructions in the email to reset your password. Disclaimer: This Thomson Reuters document has been modified by the customer from its original state.

12

1.2 User Administration and Add Support Staff

The **User Administration** screen lets you update contact information, change your E-Filing password and add other authorized E-File users, such as support staff of your Legal Organization, to your User Account. When you add Support Staff to your User Account, you are creating an association which authorizes the staff to create and complete electronic filings on your behalf.

Access to the User Administration screen is available through the personal or Legal Organization account association.

1. From any screen in the C-Track E-Filing application, select the down arrow icon to the right of your Username in the top right menu bar.

The User Account menu appears.

Case Search Create Filing	C-Track E-Filing	Thea J Ford	ě) II	
Filings >	Ноте	User Account		? 🖸
		My Account My Organizations	Ctrl + \ , A Ctrl + \ , O	\$
	C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions PayPol	Switch Association My Subscriptions	Ctrl + \ , U Ctrl + \ , S	
		Logout	Ctrl + \ , L	

Fig. 1.13: User Account menu exposed

NOTE: In addition to clicking the links in the User Account menu, each screen can be accessed through the keyboard shortcut for							
each option.							
My Account Ctrl + A							
My Organization Switch Association							
	Ctrl + C						
My Subscriptions	Ctrl + C						
Logout	Ctrl + L						
Additionally, you can access a sho	Additionally, you can access a shortcuts menu from any screen						
using the keyboard shortcut Ctrl + \.							

**Please note that the "My Organization" and "Switch Association" options will only appear in the User Account menu after you have been accepted as part of your Legal Organization by your Legal Organization Admin.

2. Select the My Account link.

The User Administration screen appears.



Case Search Create Filing	C-TRACK E-FILIN	IG		_	_	_	Thea J Ford 🗢	A 🗄
Filings >	User Administration						5	? 🗈
	TYPE -							
	Туре* 🕜	Registered Representer		Attorney Bar ID	3211955			
	USER INFORMATION -							
	Last Name*	Ford		Prefix				
	First Name*	Thea		Notification Type	All	•		
	Middle Name	J		Old Password*				
	Suffix			New Password Confirm Password ^A				
				Commin Password				
	CONTACT -							
	Primary E-mail* 👔 na	nowiz+TFord@gmail.com						
	Add Contact							
	ADDRESS ~							
	Mailing 98 E Emerald St Media PA 19063							
						_		
	Associated Legal Organ	lizations					Deactivate Account	Save
			C-Track™ E-Filing, developed by The		t Solutions			
				PayPal				

Fig. 1.14: User Administration screen

The **User Administration** screen has six containers. The information is initially collected through the Registration process you completed. You can update changes to your **User Information**, and change your **Password**, add and edit **Email** contact information.

Legal Organization Association information is not editable by you but, is controlled by the authorized Legal Organization Administrator for your Legal Organization, as identified to the Prot.

If you need to update Mailing address information, contact the Prot.

The **Associated Legal Organizations** button lets you review Legal Organization details that exist for your User ID, such as support staff, that are registered C-Track E-Filers associated to you and your Legal Organization.

The Deactivate Account button lets you confirm the inactivation of your E-Filing account.

The Save button updates any changes to your Account information.

3. Click the Associated Legal Organizations button at the bottom left of the User Administration screen.

The Manage Associated Legal Organizations screen appears.

C-TRACK E-FILIN	IG		-	-	-	Thea J	Ford 🗢	9	H
Manage Associated Lega	al Organizations								? 🗈
USER DETAILS -									
User Name Primary E-mail	TFord TFord@copenshore.com	Nar Atte	ne orney Bar ID	Thea J Ford 3211955					
LEGAL ORGANIZATION	ASSOCIATION								
Legal Organization Nam	e	Role	E-mail	S	tatus	Suppor	t Staff		
Copen and Shore		Attorney	TFord@copen	ishore.com A	pproved	Lia Dom	ico		
Add Legal Organization									
	C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions								

Fig. 1.15: Manage Associated Legal Organizations screen

The **Manage Associated Legal Organizations** screen shows your relationship to the Legal Organization. The **Add Legal Organization** link opens the **Add Legal Organization Association** window which you use to search for other Legal Organizations that are registered with the Court.

NOTE: If you are associated to more than one Legal Organization

but you do not find them using the Add Legal Organization

Association window search, contact the Prot for more information.

- 4. Click Ctrl + \, A to return to the User Administration screen.
- 5. Click Deactivate Account.

The **Confirm** window appears.

C-TRACK E-FILII	NG					Thea J Ford 🛛 🗢	A 岸
User Administration							? 🗈
TYPE -							
Туре* 🕜	Registered Representer		Attorney Bar ID	3211955			
Last Name*	Ford		Prefix				
First Name*	Thea		Notification Type	All	Ŧ		
Middle Name	J		Old Password [*]				
Suffix			New Password				
			Confirm Password*				
CONTACT -							
Primary E-mail* 🕜 🖪	anowiz+TFord@gmail.com	Confirm		×			
Add Contact		Are you sure you would	like to deactivate your E-File use ill deactivate your account and	er			
ADDRESS -		immediately log you out					
Mailing							
98 E Emerald St			OK Ca	ncel			
Media PA 19063			\sim	_			
Associated Legal Orga	anizations				Dea	activate Account	Save
			7	10.17			
		C-Track *** E-Filing, developed by	Thomson Reuters Court Managem	ient Solutions			

Fig. 1.16: Confirm window

If you choose to deactivate your account, it becomes Inactive. The Prot must be contacted to reactivate your account.

6. Click Cancel.



1.3 Navigation, Dashboard Widgets and Switch User Association

In this section we review E-File navigation, the **Home** screen appearance and the filing queues available from the left navigation menu when you Switch Association.

The C-Track E-Filing logo in the top banner of every screen is a link to navigate to your **Home** screen, from any screen in the application.

Case Search	C-TRACK E-FILING	Thea J Ford 👻 😭 🚝
Create Filing	Home	2 🖸
Filings →	Home	Configure 🔊
	C-Track™ E-Filing, developed	by Thomson Reuters Court Management Solutions

Fig. 1.17: Home screen - Configure icon

You can control the appearance of your **Home** screen to view a variety of summary information Widgets.

1. From the **C-Track E-Filing Home** screen, click the **Configure** icon **Q** at the far right of the screen.

The Edit Dashboard window appears.

C-TRACK E-FILING		Thea J Ford 👻 🥱 🚬
Home		? 된
Edit Dashboard		×\$
WIDGETS Approved Filing Cart Activity Draft Filings Error Filings Recently Filed Rejected Filing Submitted Filing	court Displays all filings the current user has added to their Cart Displays all filings the current user oreated but has not yet submitted Displays all filings the current user has submitted but failed to be received by the court ases Displays all cases the current user has filed on Displays all filings the current user submitted and have been rejected by the court d Displays all filings the current user has received Electronic Service	

Fig. 1.18: Edit Dashboard window

- 2. Click the Select All check box in the header of the Widgets container.
- 3. Deselect Widgets you prefer not to use.
- 4. Click Save.

Selected Widget containers are added to your **Home** screen. Grab the header of any Widget to drag it to a new location on the screen.



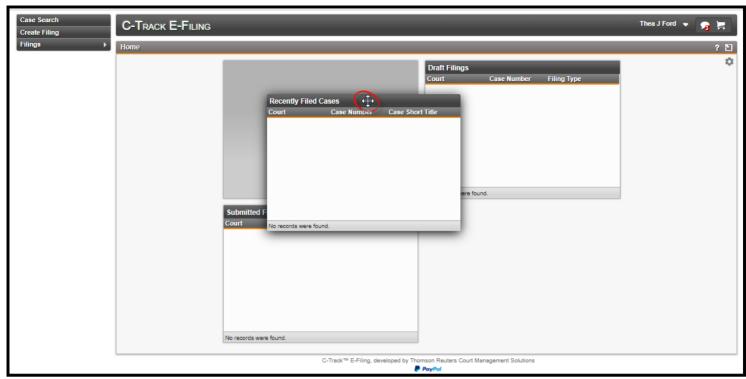


Fig. 1.19: Home screen – select Widgets added – drag and drop Widget placement

For users who are members of a Legal Organization, your **Home** screen based on the account that is active. Widgets belong to the account for which you are active. When you select the **Switch Association** option, through the **User Account** menu, your **Home** screen reflects Widget selections made for that association.

5. Click the arrow to the right of your **User Name** from the far-right top navigation bar.

The User Action menu appears.

Legal Organization Association has a one-to-many capacity which lets an authorized E-Filer associate to one or many Legal Organizations, as needed. In this example, the authorized E-Filer has only one Legal Organization.

6. Click **Switch Association** from the User Action menu.

The Select Association window appears.



Case Search Create Filing	C-Track E-Filing	Thea J Ford 👻 🥱 🐂	
Filings >	Home	? 🗉	
	Select Association ASSOCIATIONS ~ Legal Organization Personal Account Personal Account Copen and Shore Save Cancel	c	
	No records were found. No records were found. No records were found.		
	Court Case Number Filing Type		
	No records were found.		
	C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions		

Fig. 1.20: Select Association window

- Select the Legal Organization.
 Click Save.



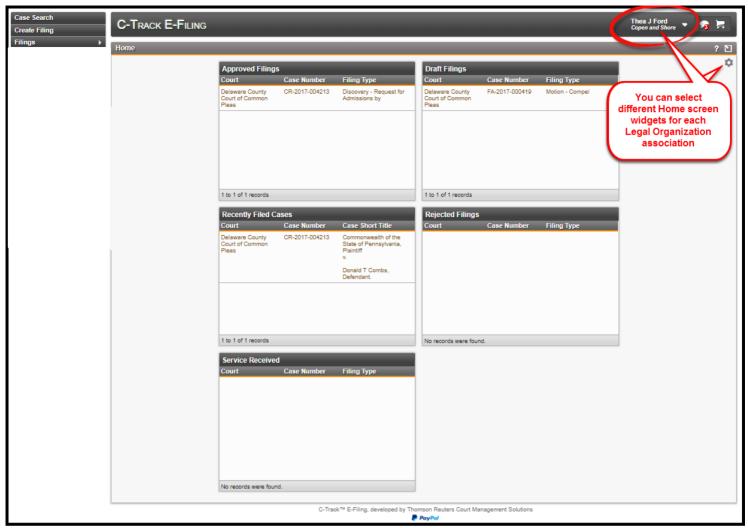


Fig. 1.21: E-File User Legal Organization Home screen

Note the appearance of the Legal Organization name below the authorized Users name and different Widgets appear because the user selected Widgets for this Legal Organization associated **Home** screen.

In addition, Filing Queue recorded activities, (the numbers that appear in parenthesis) accessed from the **Filings** left navigation menu, reflect activities for the account that is active.



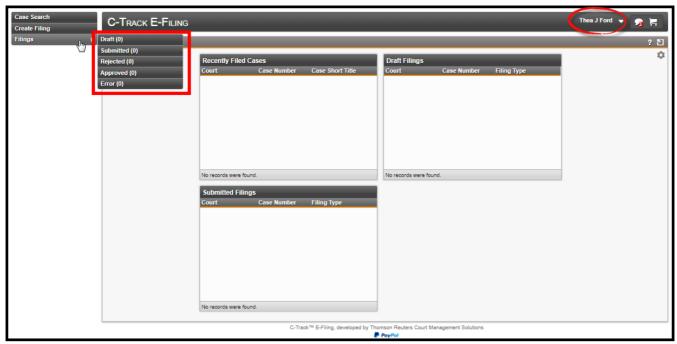


Fig. 1.22: E-File User Home screen – Personal Account

Case Search Create Filing							Thea J Ford Copen and Shore	د ک ۱۱
Filings Draft (1)								? 🗈
Submitted (0)							_	2
Rejected (0) Approved (1)	Approved Filing Court	s Case Number	Filing Type	Draft Filings Court	Case Number	Filing Type		~
Error (1)	Delaware County	Case Number CR-2017-004213	Discovery - Request for	Delaware County	FA-2017-000419	Motion - Compel	-	
	Court of Common Pleas		Admissions by	Court of Common Pleas				
All activity while this user is								
associated to the							_	
Legal	1 to 1 of 1 records			1 to 1 of 1 records			_	
Organization	Recently Filed C Court	ases Case Number	Case Short Title	Rejected Filings Court	Case Number	Filing Type	-	
	Delaware County	Case Number CR-2017-004213	Commonwealth of the	Court	Case Nulliber	гинид туре	-	
	Court of Common Pleas		State of Pennsylvania, Plaintiff v.					
			Donald T Combs,					
			Defendant.					
	1 to 1 of 1 records			No records were four	ad.		_	
	Service Received Court	Case Number	Filing Type					
	No records were four	d.						
				D. 4	10.1.5			
		C-Trac	ck™ E-Filing, developed by Th	PayPal	anagement Solutions			

Fig. 1.23: E-File User Home screen - Legal Organization association

Switch Association impacts **My Subscriptions** as well. When you submit an electronic filing, processing on the Courts' CMS to accept the filing adds the case to the **My Subscriptions** list and is dependent upon the association at the time the filing was submitted.

C-TRACK E-FILING		_	Thea J Ford 🗣	🥫 🗮			
Subscriptions		User Account		? 🗉			
COURT SELECTION ~ Court CASE INFORMATION ~ Case Number	▼ Subscribed Date From	My Account My Organizations Switch Association <u>My Subscriptions</u> Logout	Ctrl + A Ctrl + O Ctrl + U Ctrl + S Ctrl + L				
RESULTS Court Name No records were found.	Case Number Si	ubscribed Date 💌		Search			
C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions							

Fig. 1.24: My Subscriptions as E-File User not associated to Legal Organization

C-TRACK E-FILING	_		(Thea J Ford Copen and Shore	9 🛓			
Subscriptions					? 🖸			
COURT SELECTION ~	T							
CASE INFORMATION ~ Case Number		Subscribed Date From	🔁 То	2				
					Search			
RESULTS								
Court Name	Case Number		Subscribed Date 🔻					
Delaware County Court of Common Pleas	CR-2017-004213		03-18-2019 03:23 PM		×			
1 to 1 of 1 records								
C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions								

Fig. 1.25: My Subscriptions as E-File User associated to Legal Organization

NOTE: When you log out of E-File, the association is retained for the next time you log into the E-File system. When you associate your account to a Legal Organization and log out, the association is retained when you log in again icon shows the Legal Organization name.

1.4 E-Filing Notifications

Notifications behave and display the same information about E-File submission regardless of the account that is active. The

number that appears in the red circle at the bottom right of the **Notification** icon **b** includes all unread submission notifications from the users' Personal Account as well as all Legal Organizations to which the user is a member and under which they have filed.



Fig. 1.26: Home screen - Notifications

1. Click the Notification icon.

The Notifications window is exposed. The View All link is available at the bottom of the window.

C-Track E-Filing	Gillian Shore 👻	a 🗄
Home	Unread Notifications Display Al	? 🖸
C-Track™ E-Filing, developed by Thomson Reuters Court Manage ReyPed Exposing the Unread Notifications by clicking the icon shows Notifications you have not Marked As Read. Click Display All to show read and unread notifications in this window.	Your request to be beneficial to the Copen and Shore legal organization between approved. 4 days USE No. CV-2017-000421 filing(s) [REF: 251511905346119] have been accepted by the Clerk on 03-08-2018 12:47 PM. 03-08-2018 12:47 PM Case No. CV-2017-000417 filing(s) [REF: 251511905086312] have been accepted by the Clerk on 03-08-2018 12:45 PM. 03-08-2018 12:45 PM Case No. CV-2017-000417 filing(s) [REF: 251511905086312] have been accepted by the Clerk on 03-08-2018 12:44 PM. 03-08-2018 12:44 PM This is a notice to inform you that the filings, confirmation number 251511905346119, have been submitted on 11-28-2017 04:42 PM. You can view the filings here. REF: 251511905346119 11-28-2017 04:42 PM This is a notice to inform you that the filings, confirmation number 251511905086312, have been submitted on 11-28-2017 04:38 PM. You can view the filings here. REF: 251511905086312 11-28-2017 04:38 PM This is a notice to inform you that the filings, confirmation number 251511905086312, have been submitted on 11-28-2017 04:38 PM. You can view the filings here. REF: 251511905086312 11-28-2017 04:38 PM This is a notice to inform you that the filings, confirmation number 251511905086312, have been submitted on 11-28-2017 04:38 PM. You can view the filings here. REF: 251511905086312 11-28-2017 04:38 PM	

Fig. 1.27: Home screen - Notifications for the user - Notifications exposed

2. Click View All.

The **Notifications** screen appears.



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Notificatio	ons					? ይ
NOTIFIC	ATION INFORMATION	4 -				
Notific Status	cation Date From	All V	2	Subject Sender		Search
NOTIFIC	CATIONS					
	Date 🔻	From	Subject			
	03-08-2018	Migration	Filing Approval	- Case No. CV-2017-000421		
	03-08-2018	Migration	Filing Approval -	Case No. CV-2017-000417		
	03-08-2018	Migration	Filing Approval -	Case No. CV-2017-000417		
	11-28-2017	Migration	Filing Submissi	on		
	11-28-2017	Migration	Filing Submissi	on - Case No. CV-2017-000419		
	11-28-2017	Migration	Filing Submissi	on - Case No. CV-2017-000417		
	11-28-2017	Migration	Filing Submission	n - Case No. CV-2017-000417		
	11-28-2017	Migration	New Legal Orga	nization User Approved		
1 to 9 of	9 records 0 items selec	sted				
						Mark Read Mark Unread
			C-Track™ E-Filing, dev	eloped by Thomson Reuters Court Manag	gement Solutions	

Fig. 1.28: Notifications screen

The **Notifications** screen has two containers. The **Notifications** display table defaults all notifications, regardless of **Read** or **Unread** status, when you access the screen. The **Notification Information** container lets you enter search criteria of **Notification Date** range, **Subject** and **Sender**.

The Notifications display table lets you select any column header to sort the information in ascending / descending order:

Check box column – lets you select individual Notification line items as read or unread; the Check box in the table headers lets you select all line items in the table to mark as read or unread

Date column -provides the date upon which the submission notification was sent from the CMS to you

From column – shows the name of the sender; click the line item here or on the **Subject** column to expand and view details about the Notification and to reveal a **here** link to navigate to the **Filing Summary** screen in a separate browser window.

Subject column – a description of the notification; for all submissions that reference a Matter number, the number is included in the subject

Mark Read button – marks the submission line items that are selected by check box as Read and reduces the **Notification** icon number displayed at the top of all C-Track E-Filing screens

Mark Unread button – marks the submission line items that are selected by check box as Unread and increases the **Notification** icon number displayed at the top of all C-Track E-Filing screens

3. Click the Subject of a line item.



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lificati	ions					?				
OTIFIC	CATION INFORMATIO	N -								
Notific Status	cation Date From s*	All V	2	Subject Sender						
						Search				
	CATIONS	-								
	Date -	From	Subject	N. 01/00/2 000/04						
		Migration		ase No. CV-2017-000421						
	03-08-2018	Migration				Filing Approval - Case No. CV-2017-000417				
	03-08-2018	Migration		Filing Approval - Case No. CV-2017-000417						
	11-28-2017	Migration	Filing Submission							
	11-28-2017	Migration	Filing Submission -	Case No. CV-2017-000419						
	This is a notice to infe REF: 251511905086	orm you that the filings, confirmation r 312	umber 251511905086312, have	e been submitted on 11-28-2017 04:	:38 PM. You can view the filings <u>here</u> .					
	11-28-2017	Migration	Filing Submission -	Case No. CV-2017-000417						
	11-28-2017	Migration	Filing Submission - C	Case No. CV-2017-000417						
	11-28-2017	Migration	New Legal Organiza	ation User Approved						
to 9 of	f 9 records 1 items sele	cted								
						Mark Read Mark Unread				
			C-Track™ E-Filing, develop	bed by Thomson Reuters Court Man	agement Solutions					

Fig. 1.29: Notifications message expanded

The check box for the line item is selected. The expanded message provides information about the filing referenced in the Subject line. The **here** link in the expanded Subject message opens a separate browser window and navigates to the **Filing Summary** screen of the referenced filing.

4. Click the **Mark Read** button at the bottom right of the **Notifications** display table.

The line item collapses, and the bold appearance is removed indicating the message has been read.

Iteratus* All Sender IFIFCATION S From Stubject 03:08-2018 Migration Filing Approval - Case No. CV-2017-000421 03:08-2018 Migration Filing Approval - Case No. CV-2017-000417 03:08-2018 Migration Filing Approval - Case No. CV-2017-000417 03:08-2018 Migration Filing Approval - Case No. CV-2017-000417 11:28-2017 Migration Filing Approval - Case No. CV-2017-000417	Search
Date From Subject 03-08-2018 Migration Filing Approval - Case No. CV-2017-000421 03-08-2018 Migration Filing Approval - Case No. CV-2017-000417 03-08-2018 Migration Filing Approval - Case No. CV-2017-000417	Search
Date From Subject 03-08-2018 Migration Filing Approval - Case No. CV-2017-000421 03-08-2018 Migration Filing Approval - Case No. CV-2017-000417 03-08-2018 Migration Filing Approval - Case No. CV-2017-000417	Search
Date From Subject 03-08-2018 Migration Filing Approval - Case No. CV-2017-000421 03-08-2018 Migration Filing Approval - Case No. CV-2017-000417 03-08-2018 Migration Filing Approval - Case No. CV-2017-000417	_
03-08-2018 Migration Filing Approval - Case No. CV-2017-000421 03-08-2018 Migration Filing Approval - Case No. CV-2017-000417 03-08-2018 Migration Filing Approval - Case No. CV-2017-000417	
03-08-2018 Migration Filing Approval - Case No. CV-2017-000417 03-08-2018 Migration Filing Approval - Case No. CV-2017-000417	
03-08-2018 Migration Filing Approval - Case No. CV-2017-000417	
11.29-2017 Migration Filing Submission	
a mgradon migradon migradon	
11-28-2017 Migration Filing Submission - Case No. CV-2017-000419	
11-28-2017 Migration Filing Submission - Case No. CV-2017-000417	
11-28-2017 Migration Filing Submission - Case No. CV-2017-000417	
I1-28-2017 Migration New Legal Organization User Approved	

Fig. 1.30: Notifications message read

To find Notifications that have been marked Read, use the All or the Read **Status** as search criteria in the Notification Information container at the top of the screen.

1.5 Legal Organization Administration

Legal Organization Administration lets an authorized, registered E-Filer or Non-E-Filer maintain and edit associations of Attorneys and Support Staff to Legal Organizations. Administration of the Legal Organization gives a Legal Organization user the security permission to determine who is part of the Legal Organization.

In this example, an attorney E-Filer is the administrator of the Legal Organization. If you are a Non-E-Filing administrator, you do not see other menu options – Administration is the only available menu. There are no menu options for Case Search or Create Filing as this Legal Organization Administrator manages the users of C-Track E-Filing for an organization but, does not themselves create or submit e-filings for themselves or other authorized filers.



Fig. 1.31: Home screen - Menu for Attorney Legal Org Admin associated to Personal Account



Fig. 1.32: Home screen - Menu for Attorney Legal Org Admin not associated to Legal Org

1. Follow the left menu path **Administration > Legal Organization Admin**.

The Legal Organization Search screen appears.

Case Search Create Filing	C-TRACK E-FILING		Sam Lightner Morse Lightner, AAL 🔻 🧣 🗮
Filings Administration	Legal Organization Search		? ปั
Administration User Management Legal Organization Admin Subscription Management	Name Contains Type Search Type Active Status	mad V	
			Search
		C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions PayPol	

Fig. 1.33: Legal Organization Search screen

- 2. Enter Search criteria, such as the Name of Legal Organization for which you have administrative permissions.
- 3. Click Search.

The **Legal Organizations** display table is added to the **Legal Organization Search** screen. Any organization that matches the search criteria appears in the table.

C-TRACK E-FILING	_		Sam Lightner Morse Lightner, AAL	• 78	H
Legal Organization Search					? 🗈
SEARCH -					
Name Contains Type Search Type Active Status	mor V	▼		Sear	rch
LEGAL ORGANIZATIONS					
Name 🔺	Address	Туре		Active	
Morse Lightner, AAL	430 N Olive St Media PA 19063	Law Firm		Y	
1 to 1 of 1 records					
	C-Track™ E-Filing, (developed by Thomson Reuters Court Management Solutions			

Fig. 1.34: Legal Organization Search screen - Legal Organizations display table

The Legal Organizations display table:

Name column - name of the law firm or agency designated as a Legal Organization

Address column -mailing address for a legal organization

Type column – describes the nature of the Legal Organization (this should say "Agency" or "Law Firm")

Active column - indicates the state of the Legal Organization

4. Select the line item for the Legal Organization.

The Manage Legal Organization screen for the selected Legal Organization appears.

C-TRACK E-FILING		_				Sam Lightner Morse Lightner, A/	al 🔻 🧏
lanage Legal Organization							?
LEGAL ORGANIZATION DET	TAILS -			CONTACTS -			
Type Name Matter Numbers Enabled Active	Law Firm Morse Lightner, AAL		Edit				Add
ADDRESS -							
Mailing Address 430 N Olive St Media Pennsylvania Unite	ed States 19063						
MAIL DOMAINS -							Ado
EGAL ORGANIZATION PEN Name Morse, Julie	DING ASSOCIATION	Role Attorney		E-mail	seil com	Status Link	_
deWolf, Emily T		Attorney		nanowiz+ewolf@gma		Link	
Owens, Tim		Support Staff		nanowiz+towens@gm		Link	
LEGAL ORGANIZATION USE	R SEARCH -						
Name Contains Status		¥		E-mail Role		¥	Search
LEGAL ORGANIZATION USE	RS						
Name	Role		E-mail		Status	Support St	aff
Morse, Julie	Attor			IMorse@gmail.com	Pending Approval	View/Edit	
.ightner, Sam JeWolf, Emily T		I Organization Admin		slight@gmail.com	Approved Reading Approval	View/Edit View/Edit	
Dwens, Tim	Attor	ney oort Staff		ewolf@gmail.com owens@gmail.com	Pending Approval Pending Approval	View/Edit	
		C-Track™ E-Filir		son Reuters Court Management Sa	olutions		

Fig. 1.35: Manage Legal Organization screen

The Manage Legal Organization screen provides Add and Edit links to information about the legal organization. The Legal Organization Details container identifies the Name and Type of Legal Organization and Status.

The **Contacts** container provides methods by which you contact the Legal Organization.

The **Address** container provides the physical mailing **Address** for the Legal Organization. This is important when Service information is used for an electronic filing.

The **Email Domains** container lets you specify a primary mail server for electronic communications. When you provide a domain (@yourdomainnamehere.com) and a new filer with an active email account with the domain registers as an E-Filer, they are automatically approved since the domain for the Legal Org is known to E-File.

The **Legal Organization Pending Association** display table shows authorized, registered E-File Users who have requested an association to the Legal Organization. The Pending Association means the Legal Organization and E-Filer need to be linked. All column headers are sortable.

Name column – name of the entity requesting to be linked to the Legal Organization

Role column - nature of the relationship to the Legal Organization

E-mail column - electronic account used by the E-Filer to register in the C-Track E-File application

Status column - Link requires you click the link to update the E-Filers status

The Legal Organization User Search container lets you search for Users already associated to the Legal Organization.

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The Legal Organization Users display table shows search results for associated users.

5. Click Edit from the Legal Organization Details container.

The Legal Organization Details window opens.

C-TRACK E-FILING				Sam Lightner Morse Lightner, Ai	u • 5	g 岸
Manage Legal Organization						? 🗈
LEGAL ORGANIZATION DETAILS ~ Type Law Firm Name Morse Matter Numbers Enabled Active * ADDRESS ~ Mailing Address 430 N Olive St Media Pennsylvania United States EMAIL DOMAINS ~	n Legal Organization Details LEGAL ORGANIZATION DETAI Type* Name* Matter Numbers Enabled Active	LS – Law Firm Morse Lightner, AAL	CONTACTS ~	Please note that the Matter Numbers Enabled box should always remained unchecked as this Monroe County does not use this function.)	Add

Fig. 1.36: Legal Organization Details window

- 6. Make any necessary changes.
- 7. Click Save.

You return to the Manage Legal Organization screen.

- 8. Update additional information about the Legal Organization, using the Add and Edit links, as needed.
- 9. Click Search in the Legal Organization User Search container.

Legal Organization users who are associated in any way appear in the Legal Organization Users display table at the bottom of the screen.



C-TRACK E-FILING				S. M	am Lightner Iorse Lightner, AAL 🔹 🦻 📜
Manage Legal Organization					? ව
LEGAL ORGANIZATION DETAILS -		CONTACT	S -		
Type Law Firm Name Morse Light Matter Numbers Enabled	ner, AAL				Add
		Edit			
ADDRESS -					
Mailing Address 430 N Olive St Media Pennsylvania United States 1906	3				
EMAIL DOMAINS - Domain gmail.com E Domain morselightner.com E	dit				Add
LEGAL ORGANIZATION PENDING ASSOC					
Name Morse, Julie	Role		E-mail nanowiz+JMorse@gmail.com	Status).
deWolf, Emily T	Attorney		nanowiz+ewolf@gmail.com	Link	
Owens, Tim	Support Staff		nanowiz+towens@gmail.com	Link	
LEGAL ORGANIZATION USER SEARCH					
Name Contains		E-mail	(
Status	Ŧ	Role			Search
LEGAL ORGANIZATION USERS					
Name	Role	E-mail	¥	Status	Support Staff
Morse, Julie	Attorney	nanowiz+JMorse@gma	il.com	Pending Approval	View/Edit
Lightner, Sam	Legal Organization Admin	nanowiz+slight@gmail.	com	Approved	View/Edit
deWolf, Emily T	Attorney	nanowiz+ewolf@gmail.		Pending Approval	View/Edit
Owens, Tim	Support Staff	nanowiz+towens@gma	il.com	Pending Approval	View/Edit
	C-Track™ E-Filing,	developed by Thomson Reuters	Court Management Solutions		

Fig. 1.37: Manage Legal Organization screen - Legal Organization Users searched

10. Click Link from the Status column in the Legal Organization Pending Association display table.

The User – Legal Organization Details window appears.

Name	ON PENDING ASSOCIATION	Role	E-m	ail	Sta	tus
Morse, Julie		Attorney		owiz+JMorse@gmail.com	Link	
deWolf, Emily T		Attorney	nanc	owiz+ewolf@gmail.com	Link	(
Owens, Tim	User-Legal Organization Det	ails		* nail.com	Lin)	(
LEGAL ORGANIZA Name Contains Status LEGAL ORGANIZA	USER-LEGAL ORGANIZATION E Active Role Service E-Mail* Add Another	DETAILS -	Attorney JMorse@gmsil.com JMorse@morselightner.com			▼ Search
Name	Add Another				Status	Support Staff
Morse, Julie			Save Remove	Cancel	Pending Approval	View/Edit
Lightner, Sam					Approved	View/Edit
deWolf, Emily T	Atto	rney	nanowiz+ewolf@gmail.com		Pending Approval	View/Edit
Owens, Tim	Sun	port Staff	nanowiz+towens@gmail.co	m	Pending Approval	View/Edit

Fig. 1.38: User – Legal Organization Details window

The User - Legal Organization Details container provides an editable summary of the users Role, and Service Email

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address where notifications about electronic filing activities are sent. The **Active** check box controls the **Status** of the user. The **Add Another** link lets you add additional email addresses for other authorized E-Filers associated to the Legal Organization to receive all communications regarding submissions, acceptances and rejections.

The **Remove** button lets you end the association of the E-Filer to the Legal Organization but does not remove the E-Filer from the application.

- 11. Select the Active check box.
- 12. Click Save.

You return to the **Manage Legal Organization** screen. The user is removed from the **Legal Organization Pending Association** display table and appears in the **Legal Organization Users** display table with a **Status** of Approved.

C-TRACK E-FILING				S	iam Lightner Iorse Lightner, AAL 🔹 🦙 📜
lanage Legal Organization					? 1
LEGAL ORGANIZATION DET	AILS -		CONTACTS -		
Туре	Law Firm				Add
Name	Morse Lightner, AAL				
Matter Numbers Enabled	×				
Active	*	Edit			
ADDRESS -			1		
Mailing Address 430 N Olive St Media Pennsylvania Unite	ed States 19063				
EMAIL DOMAINS -					
Domain gmail.co	om Edit				
Domain morselig	ghtner.com Edit				
					Add
LEGAL ORGANIZATION PENI Name	DING ASSOCIATION Role		E-mail	Status	
deWolf, Emily T	Attorney		nanowiz+ewolf@gmail.com	Link	
Owens, Tim	Support Staff		nanowiz+towens@gmail.com		
LEGAL ORGANIZATION USE	R SEARCH -				
Name Contains			E-mail		
Status	T		Role		T
					Search
LEGAL ORGANIZATION USEI	RS				
Name	Role	E-mail		Status	Support Staff
Morse, Julie	Attorney	nanowiz+	JMorse@gmail.com	Approved	View/Edit
Lightner, Sam	Legal Organization Admin	n nanowiz+	slight@gmail.com	Approved	View/Edit
deWolf, Emily T	Attorney	nanowiz+	ewolf@gmail.com	Pending Approval	View/Edit
Owens, Tim	Support Staff	nanowiz+	towens@gmail.com	Pending Approval	View/Edit
	C-Track [™]		nson Reuters Court Management Solution:	5	

Fig. 1.39: Manage Legal Organization screen

13. Click Search in the Legal Organization User Search container.

Legal Organization users appear in the Legal Organization Users display table.

C-TRACK E-FILING		_			_	Sam Lightner Morse Lightner, A	al 🔹 🎜 🚆
Vanage Legal Organization							? [
LEGAL ORGANIZATION DET	au c		CONTACTS -				
	Law Firm		CONTACTS				Add
Type Name	Morse Lightner, AAL						Add
Matter Numbers Enabled	*						
Active	*						
		Edit					
ADDRESS -							
Mailing Address 430 N Olive St Media Pennsylvania Unite EMAIL DOMAINS -	d States 19063						
Domain gmail.co Domain morselig LEGAL ORGANIZATION PENI Name	htner.com Edit		E-mail			Status	Add
Owens, Tim	Support Staff			towens@gmail.com		Link	
LEGAL ORGANIZATION USER	R SEARCH -						
Name Contains			E-mail				
Status	•		Role			•	Search
LEGAL ORGANIZATION USER	RS						
Name	Role	E-mail			Status	Support S	taff
Morse, Julie	Attorney	nanowiz+J	Morse@gmail.com		Approved	View/Edit	
Lightner, Sam	Legal Organization Admin	nanowiz+s	light@gmail.com		Approved	View/Edit	
deWolf, Emily T	Attorney	nanowiz+e	wolf@gmail.com	ha	Approved	View/Edit	
Owens, Tim	Support Staff	nanowiz+b	owens@gmail.com	d m	Pending Approval	View/Edit	
	C-Track™ E-F	iling, developed by Thom:	on Reuters Court Ma	nagement Solutions			

Fig. 1.40: Manage Legal Organization screen

14. Select the User with a Status of Pending Approval from the Legal Organization User display table.

The User – Legal Organization Details window appears.

15. Repeat steps 11 through 13.

When you return to the Manage Legal Organization screen all pending associations are approved.

Now we look at another Legal Organization with a Legal Organization User whose **Status** is currently rejected. We change the **Status** to approved.



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Manage Legal Organization				?	2
LEGAL ORGANIZATION DETAILS	.	CONTACTS -			
	Firm	Contacta		Add	
1964	en and Shore				
Matter Numbers Enabled					
Active 🗸		Edit			
		Luit			
ADDRESS -					
Mailing Address 98 E Emerald Ave Media United States 19063					
EMAIL DOMAINS - Domain gmail.com	Edit			Add	
LEGAL ORGANIZATION PENDING / Name	ASSOCIATION	E-mail		Status	
No records were found.					
LEGAL ORGANIZATION USER SEA	RCH -				
Name Contains		E-mail			
Status	*	Role		Y	
				Search	
LEGAL ORGANIZATION USERS					
Name	Role	E-mail	Status	Support Staff	
Linney, Lauran	Attorney	LLinn@gmsil.com	Approved	View/Edit	
Shore, Gillian	Attorney	gshore@gmail.com	Approved	View/Edit	1
Copen, Alex	Attorney	acopen@gmail.com	Approved	View/Edit	1
Simms, Genna	Attorney	GSimms@gmail.com	Rejected	View/Edit	1
Domico, Lia	Support Staff	ldom@gmail.com	Approved	View/Edit	
Ford, Thea J	Legal Organization Admin	TFord@gmail.com	Approved	View/Edit	
	C-Track™ E-Filir	g, developed by Thomson Reuters Court Managemer	nt Solutions		

Fig. 1.41: Manage Legal Organization screen

16. Select the line item for the **User** with a **Status** of Rejected from the **Legal Organization User** display table. The **User – Legal Organization Details** window appears.



				Add
LEGAL ORGANIZATION PENDING ASSOCIATI	User-Legal Organization Det	ails	×	
Name No records were found. LEGAL ORGANIZATION USER SEARCH Name Contains Status	USER-LEGAL ORGANIZATION D Active Role Service E-Mail* Add Another	Attorney GSimms@gmail.co		Status
LEGAL ORGANIZATION USERS				
Name	Role	E-mail	Status	Support Staff
Linney, Lauran	Attorney	LLinn@gmail.com	Approved	View/Edit
Shore, Gillian	Attorney	gshore@gmail.com	Approved	View/Edit
Copen, Alex	Attorney	acopen@gmail.com	Approved	View/Edit
Simms, Genna	Attorney	GSimms@gmail.com	Rejected	View/Edit
Domico, Lia	Support Staff	ldom@gmail.com	Approved	View/Edit
Ford, Thea J	Legal Organization Admin	TFord@gmail.com	Approved	View/Edit
	C-Track™ E-Filing	developed by Thomson Reuters Court Mana PayPal	gement Solutions	

Fig. 1.42: User – Legal Organization Details window

- 17. Select the **Active** check box.
- 18. Click Save.

You return to the Manage Legal Organization screen. The Users Status is updated to Approved.

Now, we associate a Support Staff member of your Legal Organization to an E-Filer, and make the support staff an Authorized E-Filer you allow them access to all filings available through Filings menus, including filings in Draft status. Essentially, Support Staff associated through the Legal Organization gives them security permission to initiate and complete filings on legal organization E-Filers behalf.

Name	Role	E-mail	Status	Support Staff
Linney, Lauran	Attorney	LLinn@gmail.com	Approved	View/Edit
Shore, Gillian	Attorney	gshore@gmail.com	Approved	View/Edit
Copen, Alex	Attorney	acopen@gmail.com	Approved	ViewEdit
Simms, Genna	Attorney	GSimms@gmail.com	Approved	View/Enit
Domico, Lia	Support Staff	ldom@gmail.com	Approved	View/Eur
Ford, Thea J	Legal Organization Admin	TFord@gmsil.com	Approved	View/Edit
-				

Fig. 1.43: Legal Organization Users display table

19. Click the View / Edit link from the Support Staff column of the Legal Organization Users display table.

The Authorized Support Staff window appears.

Name	Authorized Support Staff		×	Status	Support Staff
Linney, Lauran				Approved	View/Edit
Shore, Gillian	SUPPORT STAFF SEARCH -			Approved	View/Edit
Copen, Alex	Name	Status	Ŧ	Approved	View/Edit
Simms, Genna	Contains			Approved	View/Edit
Domico, Lia			Country	Approved	View/Edit
Ford, Thea J			Search	Approved	View/Edit
			2		

Fig. 1.44: Authorized Support Staff window

The Authorized Support Staff window has a single container, Search.

20. Click Search.

The Support Staff Results display table and the Add Support Staff link appear.

Name	Authorized Support Staff		×	Status	Support Staff
Linney, Lauran				Approved	View/Edit
Shore, Gillian	SUPPORT STAFF SEARCH -			Approved	View/Edit
Copen, Alex	Name Si Contains	tatus		Approved	View/Edit
Simms, Genna	Contains			Approved	View/Edit
Domico, Lia			Search	Approved	View/Edit
Ford, Thea J				Approved	View/Edit
	SUPPORT STAFF RESULTS				
	Name Address	E-mail	Status	ns	
	No records were found.				
	Add Support Staff				

Fig. 1.45: Support Staff Results display table - Add Support Staff link

21. Click the Add Support Staff link.

The Add Support Staff window appears.

	Authorized Support Staf					
Linney, Lauran						View/Edit
Shore, Gillian	SUPPORT STAFF SEARCH	*				View/Edit
Copen, Alex	Name Contains		Statue	T		
Simms, Genna	Contains		Add Support Staff			*
Domico, Lia			SUPPORT STAFF SEARCH -			
Ford, Thea J	SUPPORT STAFF RESULTS	;	Name Contains	St	tatus	T
	Name	Address				
	No records were found.					Search

Fig. 1.46: Add Support Staff window

22. Click Search.

All Legal Organization users with a role of Support Staff appears in the Support Staff Results display table.

	Authorized Support Staf						
Linney, Lauran							
Shore, Gillian	SUPPORT STAFF SEARCH	Add Support Staff					×
Copen, Alex	Name Contains						
Simms, Genna	Contains	SUPPORT STAFF SEARCH 🔻					
Domico, Lia		Name Contains		Status			T
	SUPPORT STAFF RESULTS						Search
	Name						
	No records were found.	SUPPORT STAFF RESULTS					
	Add Support Staff	Name	Address		E-mai		Status
	_	Domico, Lia	98 E Emerald St Media PA 19063	- dhoj	nanowi	z+ldom@gmail.com	Approved
		1 to 1 of 1 records		0			

Fig. 1.47: Add Support Staff results

23. Select the line item for the staff member you want to associate as Support Staff to the selected Authorized E-Filer.

You return to the Authorized Support Staff window.

Name	Authorized Suppo	ort Staff			× St	atus	Support Staff
Linney, Lauran					Ap	proved	View/Edit
Shore, Gillian	SUPPORT STAFF SE	EARCH 🔻			Ap	proved	View/Edit
Copen, Alex	Name Contains		Status	٣	Ap	proved	View/Edit
Simms, Genna	Contains				Ap	proved	View/Edit
Domico, Lia				Search	Ap	proved	View/Edit
Ford, Thea J					Ap	proved	View/Edit
	SUPPORT STAFF R	ESULTS					
	Name	Address	E-mail	Status	utions		
	Domico, Lia	98 E Emerald St Media PA 19063	nanowiz+ldom@gmail.com	Approved			
	1 to 1 of 1 records			L			
	Add Support Staff			h	5		

Fig. 1.48: Add Support Staff results

If you needed to remove the support staff association, the X at the far right of the line item lets you end the association between the Authorized E-Filer and the Support Staff.



1.6 Create a New Case E-Filing

In this example we create a Filing of a new case. We are logged into the C-Track E-Filing site for an existing user who is an attorney associated to a Legal Organization – a law firm.

NOTE: The Court determines the maximum file size of documents that can be upload in an e-Filing submission. For Monroe County, the upload limit is 25MB. Any documents larger than 25 MB will need to be split and uploaded in multiple parts.

1. From the home screen, click **Create Filing** from the left menu.

The Create Filing screen appears.

Case Search Create Filing	C-TRACK E-FILING		Emily T deWolf Morse Lightner, AAL 🔹 🦙 🥁
Filings V	Create Filing COURT SELECTION ~ Court* Filing Category*	Select a Court	? ป
		C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions	Next

Fig. 1.49: Create Filing screen

The Create Filing screen has a single container, Court Selection. You can select a Court and Filing Category.

- 2. Select a Court.
- 3. Select a Filing Category. Here, we select New Case.

With the selection of New Case in the Filing Category field, a second container, New Case, is added to the screen.



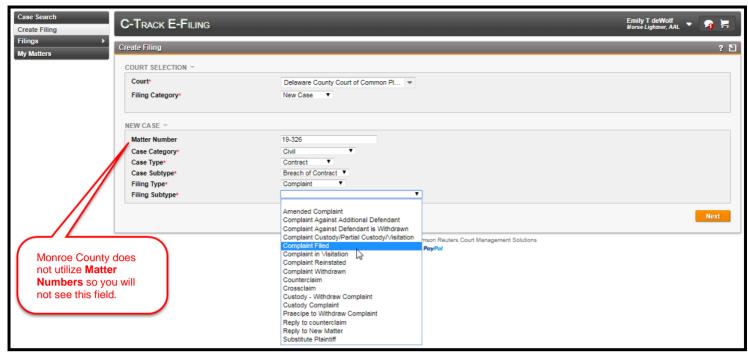


Fig. 1.50: New Case container - Case Category, Type, Subtype, Filing Type entered Filing Subtype exposed

- 4. Select Case Category.
- 5. Select Case Type.
- 6. Select Case Subtype.
- 7. Select Filing Type.
- 8. Select Filing Subtype.
- 9. Click Next.

NOTE: Once you leave the Create Filing screen, the filing moves into Draft status in the E-File application. If you navigated to any other screen in the E-file application before you completed this filing, the filing is available to be completed through the Filings > Draft left menu path.

The **Filing Information** container appears below the left navigation menu and the **Filing Progress Indicator** appears below the top C-Track E-Filing banner. The **Party Information** indicator is highlighted and the **Party Information** container appears.

	istration >	Monroe County, Pen		Jessica L Spencer Weitzmann, Weitzmann, & Huffman 🔻 📌 🏹	
Create Filing Filings		FILING PROGRESS Party Information	Filing Information Upload Document Se	ervice Information Filing Summary	
- Fili	ng Information	Party Information			? ਹੈ
	Monroe County Court of Common Pleas Civil - Tort - Intentional Tort Complaint - Complaint	PARTIES Name Type No started meter bound IAdd Another Case Party	Role Atta	orney(s)	Address Next
			C-Track™ E-Filing, developed by 1	Thomson Reuters Court Management Solutions	

Fig. 1.51: Filing Progress- Party Information

10. Click the Add Another Case Party link at the bottom left of the Parties display table.

The Party Information window appears.

C-TRACK E	FILING					Emily T de Morse Lightn	Wolf er, AAL 🔻 🧃 🗮
FILING PROGRES	S Party Information	Filing Information	Upload Document Service In	nformation Filing Summ	nary		
Party Information	n						? 🗈
PARTIES	Party Information					×	
Name No records were f	ADD PARTY ~						
Add Another Ca	Role*	٣	Type*	•			
	Representation	۲					Next
	Add Alias						
	Add Self				Save Cancel		

Fig. 1.52: Party Information window

The **Party Information** window has a single container, **Add Party**. This window expands with additional containers based upon the selections chosen in the **Role** and **Type** drop downs.

11. Select Role.

With the selection of Role, another container, Representer, is added to the window.

Monro	DE COUNTY, I	PENNSYLVA	ANIA CIVIL I	E-FILING			Jess Weitz	sica L Spencer mann, Weitzmann, & Huffman	• 宛 📮
FILING PROG	RESS Party Inform	ation Filing In	nformation Up	pload Document Serv	vice Information Fili	ng Summary			
Party Inform	Party Information		_		_		2 ×		? 🗂
PARTIES Name No records Add Anoth	ADD PARTY - Role* Representation	Plaintiff	~	Туре*	~		3	ress	_
	ADDRESS INFORM	ATION -							Next
	Address 1* Address 2 Address 3 Zlp			City^ Country∗ State^	United States Pennsylvania	~	~		
	REPRESENTER - Representer(s)*	Add Represente	er						
	CONTACT INFORM		Contratt						
	Type* CONTACT INFORM	Email ATION Work Phone	Contact*				×		
	Add Contact Add Alias								
	Add Self					Save	Cancel		

Fig. 1.53: Party Information window -containers added based on Party selections

12. Select Type, in the Add Party container.



With the selection of Type, another container, Name, is added to the window.

Monroe	e County, P	PENNSYLV	ANIA CIVIL	E-FILING)	Jessica L Spencer Weitzmann, Weitzmann, & Huffman	• 宛 🛤
FILING PROGR	ESS Party Informat	tion Filing	Information L	Jpload Document Se	rvice Information Fi	ling Summary			
Party Inform	Party Information	_	_			_	2	×	? 🗂
PARTIES Name No records Add Anoth	ADD PARTY - Role* Representation	Plaintiff	×	Type*	Person V			dress	_
	NAME - Last Name* First Name* Suffix			Middle Name Prefix				-	Next
	Address Informa Address 1* Address 2 Address 3 Zip	TION -		City^ Country∗ State^	United States Pennsylvania	~	~		
	REPRESENTER - Representer(s)*	Add Represen	ter						

Fig. 1.54: Party Information window -containers added based on Type selection

- 13. Select Representation, in the Add Party container.
- 14. Enter Last Name, in the Add Party container.
- 15. Enter First Name.
- 16. Click the Add Representer link from the Representer container.

The Representer Search window appears.

C-TRACI	K E-FILING		Emily T deWolf Morse Lightner, AAL 🔻 📌 🧺
FILING PROG	RESS Party Informati	on Filing Information Upload Document Service Information Filing Summary	
Party Inform	Party Information		
PARTIES Name No records Add Anoth	ADD PARTY ~ Role* Representation	Plaintiff V Type* Person V Attorney V	iress
	NAME * Last Name* First Name*	Carter Middle Name JoAnne	Next
	REPRESENTER - Representer(s)* Add Alias Add Self	Representer Search × TYPE * Representer Type Attorney ▼ Iancel	
		NAME - First Name Last Name Add Self	

Fig. 1.55: Representer Search window

The **Representer Search** window has two containers to let you enter search criteria based on an attorney or law firm search. The kind of search is based on the selection of Representer **Type** – Attorney or Law Firm. Note the **Add Myself** button which eliminates the need to search for a representer and adds credentials based on your user login information.

17. Click Add Self.

The Name of the logged in user is entered as the attorney for this case party.

C-Trac	K E-FILING					Emily T deWolf Morse Lightner, AAL	• 🤋 🗏
FILING PROG	RESS Party Informa	ation Filing Information	Upload Document Service	Information Filing Sur	mmary		
Party Inform	Party Information					¢	? 🗈
PARTIES Name No records	ADD PARTY -	Plaintiff ▼	Туре*	Person V		iress	
Add Anoth	Representation	Attorney 🔻					
	NAME -			/			Next
	Last Name*	Carter	Middle Name				
	First Name*	JoAnne					
	REPRESENTER -						
	Representer(s)*	deWolf, Emily T Add Representer	×				
	Add Alias						
	Add Self				Save Cancel		

Fig. 1.56: Party Information window – Add Self functionality

Note the **X** that appears to the right of the **Representers** name. You can remove the representer by clicking the **X**. You do not confirm the deletion of information; the information is removed.

If a support staff user is filing on behalf of an Attorney, the Attorneys name appears as the Representer when the support Disclaimer: This Thomson Reuters document has been modified by the customer from its original state.

C-TRAC	K E-FILING					Lia Domico Laura Ellen Linney 🔻 Copen and Shore	
FILING PROG Party Inform PARTIES Name No records y Add Anothe	Party Information ADD PARTY ~ Role* Representation	Plaintiff Attorney	Туре*	Person	×	dress	? ව
-	Last Name* First Name*	Ranselear Carl	Middle Name	James			Next
	REPRESENTER -	Linney, Laura Ellen					
	Add Alias				Save Cancel		

Fig. 1.57: Party Information window – support staff associated through a Legal Organization files for Attorney

- 18. Use the Add Representer link to search for and add additional attorneys for the party, if needed.
- 19. Click Save.

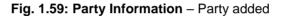
The Party appears in the Parties display table of the Party Information screen.

Case Creat	Search te Filing		C-TRACK E-FILING	3						Emily T deWolf Morse Lightner, AAL	•	1	
Filing My Ma		F	ILING PROGRESS Party In	nformation	Filing Information	Upload Document	Service Information	Filing Summary					
- Fili	ing Information		Party Information									?	2
Court	Delaware County Court of Common Pleas		PARTIES Name	_	Туре	Role		mey(s)	A	ddress			
Class	Civil - Contract - Breach of Contract		JoAnne Carter 1 to 1 of 1 records		Person	Plaintiff	Emily	T deWolf					
Туре	Complaint - Complaint Filed		Add Another Case Party									Next	
Matter	r 19-326												1
					c	-Track™ E-Filing, develope	d by Thomson Reuters Cou	rt Management Solutions					_

Fig. 1.58: Filing Progress screen - Party added

- 20. Click the Add Another Case Party link.
- 21. Select Role.
- 22. Select **Type**. Here, we select Organization. Note the containers present different fields to capture contact information.
- 23. Select Representation. Here, we select Self representation. For this case party, you are providing the information that is known to you at the time of filing. You may not know if the party is retaining an attorney or law firm. This can be updated during the case proceedings, as needed.
- 24. Enter Organization Name.
- 25. Enter Address.

C-TRACH	K E-FILING					Emily T deWolf Morse Lightner, AAL	• 🤋 🛓
FILING PROGR	RESS Party Informa	ation Filing Information	Upload Document Se	rvice Information Filing	3 Summary		
Party Inform	Party Information	I.				×	? 🛍
PARTIES Name JoAnne Car 1 to 1 of 1 n	ADD PARTY × Role* Representation	Defendant T	Туре*	Organization ▼		Address	
Add Anoth	NAME ▼ Organization Name*	Lewis Roofing, LLC					Next
		ATION -					
	Address 1* Address 2 Address 3 Zip	149 Porter St	City Country* State^	Essington United States Pennsylvania	T T		
	Add Alias Add Self				Save Cancel		



If an organization is known under another Name, use the **Add Alias** link below the bottom left of the **Contact Information** container to add Alias Information.

Party Information	1				
ADD PARTY ~ Role* Representation	Defendant ▼	Type*	Organization ▼		
NAME -					
Organization Name*	Lewis Roofing, LLC				
CONTACT INFORM	ATION -				
Address 1*	149 Porter St	City	Essington		
Address 2		Country*	United States		Ŧ
Address 3		State^	Pennsylvania	Ŧ	
Zip	19029				
ALIAS INFORMATIO	DN -				
Alias Type*		Name/Organi:	zation*		×
Add Alias	АКА				
Add Self	DBA FDBA			Save	Cancel
	FKA				
	NKA				
	Other Sic				

Fig. 1.60: Party Information - Alias Information container

26. Click Save.

You return to the **Party Information** screen with the case party information entered.

C-TRACK E-	Filing				Emily T deWolf Morse Lightner, AAL	• 🦻	
FILING PROGRESS	Party Information	Filing Information Up	load Document Service I	nformation Filing Summary			
Party Information						1	? 🔁
PARTIES							
Name		Туре	Role	Attorney(s)	Address	_	
JoAnne Carter		Person	Plaintiff	Emily T deWolf			
Lewis Roofing, LLC		Organization	Defendant		149 Porter St Essington PA 19029		
1 to 2 of 2 records							
Add Another Case	Party						
						Next	
		C-Tra	k™ E-Filing, developed by Thomso ₽ Pay	n Reuters Court Management Solutions			

Fig. 1.61: Filing Progress screen - Party added

Repeat the Add Another Case Party process to add additional parties to the case, as needed.

27. Click Next.

The **Filing Information** Indicator is highlighted and **Filing Information** screen appears. Additionally, the filing has been moved to the **Draft Filing Queue** which you can access from the **Filings > Draft** left menu option. If you navigate away from the filing, you can return to it by selecting it from the **Filings** display table on the **Draft Filing Queue** screen.

C-TRACK E-FILING	3			Emily T deWolf Morse Lightner, AAL 🔻 🧣 🗮
FILING PROGRESS Party In	Filing Information	Upload Document Service Information	Filing Summary	
Filing Information		-		? 🖸
DETAILS -				
Comments				
Emergency Confidential		Amended		
FILER INFORMATION -				
Filed on Behalf of	Value JoAnne Carter Lewis Roofing, LLC			
FILING FEES Fee Name				Amount
Complaint Filed				\$208.24
Total				\$208.24
FILING FEES -				
Due From*	T	Fees Not Required	T	
Comments				
				Previous Next
	(C-Track™ E-Filing, developed by Thomson Reuters Court M	anagement Solutions	

Fig. 1.62: Filing Information screen

NOTE: Each element of the Filing Progress Indicator is a link to navigate to the corresponding screen. You are not required to complete the screens in any particular order however, Filing Progress is organized in a logical manner to aid in the completion of all required information for a filing.

NOTE: In Monroe County's current E-File workflow, you will see an Additional Information container. The information in this bundle includes Money Damages, Class Action Suit, MDJ Appeal, and Pro Se. Populate this information as necessary as per Rules of Civil Procedure.

The **Filing Information** screen has four containers. The **Details** container lets you indicate if the filing is an **Emergency**, an **Amended** filing or is **Confidential** by selecting the check boxes. You can also add a **Comment** to the filing that the Prot will see.



Case types marked **Confidential** and electronic filings of a new case identified by E-Filers, when they select the **Confidential** check box, establish special security around those confidential cases if approved by the Prot when the filing is accepted. Confidential security means the case requires permissions at the user level for Court Personnel to view and maintain information about the case. Confidential security also means the case will not be returned in a search on the E-File or Public Access Portals unless the user has authorized permission to view cases marked confidential. Attorneys who are added to the **E-File User Access** screen manually by the Prot, or through automation by electronic filing, will have access to search for and file on Confidential cases. This permission will NOT extend to Support Staff filing on behalf of an attorney unless the Support Staff are added individually by the Prot. An E-Filer who is not associated to the case cannot search for, nor electronically file on, a Confidential case, even if they know the case number.

		Public Case	Confidential Case
Licor Not on EE Licor Assocs List	Search / Access Case	×	×
User Not on EF User Access List	E-File into Case	0	
User on EF User Access List	Search / Access Case	0	0
USEI UN EF USEI ALLESS LISI	E-File into Case	0	0

Fig. 1.63: Confidential controls

The Filer Information container lets you identify the entity(s) for whom you are filing.

The **Filing Fee** container displays the court fee for the filing type.

The **Filing Fees** container identifies the **Due From** party and also lets you indicate circumstances where fees are not required (must comply with Pennsylvania Rules of Civil Procedure and Monroe County Local Rules).

The Additional Information container lets you specify additional Monroe County case specific information.

The Previous button navigates back to the Party Information screen.

The Next button saves information you have entered and navigates to the Upload Document screen.

28. Select the check box(es) for parties for whom you are filing.



45

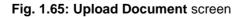
C-TRACK E-FILING		_		_	Emily T deWolf Morse Lightmer, AAL 👻 🧣
FILING PROGRESS Party Info	Filing Information	Upload Document	Service Information Fi	ling Summary	
Filing Information					?
DETAILS -					
Comments					
Emergency Confidential			Amended		
FILER INFORMATION -					
Filed on Behalf of A	Value JoAnne Carter Lewis Roofing, LLC				
Other Filed on Behalf of					
FILING FEES					
Fee Name					Amount
Complaint Filed					\$208.24 \$208.24
FILING FEES -					
Due From* Comments	JoAnne Carter 🔻		Fees Not Required		T
					Previous Next
		C-Track™ E-Filing, developed	by Thomson Reuters Court Mana PayPal	agement Solutions	

Fig. 1.64: Filing Information screen - selections complete

29. Click Next.

The Upload Document screen appears.

MONROE COUNT	Jessica L Spencer Weitzmann, Weitzmann, & Huffman 🔻 宛 岸									
FILING PROGRESS Party In	formation Filing Information	Upload Document Service Information	Filing Summary							
Upload Document				? ১						
DOCUMENT -										
Name	Complaint - Complaint	File*	Choose File No file choser	1						
Exclude from eService		Comments								
Request Confidential^		Confidential Reason	^ `							
Add Another										
				Previous Next						
	C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions									



NOTE: The Court determines the maximum file size of documents that can be upload in an e-Filing submission. For Monroe County, the upload limit is 25MB. Any documents larger than 25 MB will need to be split and uploaded in multiple parts.
 You must save larger documents in parts or sections and use the Add Another link at the bottom left of the Upload Document container to upload all documents of the filing.

The **Upload Document** screen has a single container. The **Documents** container lets you upload documents that are electronically transferred to the Court when you submit the filing. You can specify **Request Confidential** and **Exclude from e-Service** for the document. You must identify a **Confidential Reason** when requesting a document remain confidential. You can also add a **Comment** about the document.

The **Add Another** link lets you upload as many documents as needed. If the document you attach exceeds the file size limit established by the Court, a warning message shows. You must save larger documents in parts or sections and use the Add Another link to upload all documents of the filing.



30. Click Browse or Choose File.

NOTE: Depending upon the browser you use to access the C-Track E-File application, elements within the application may have a slightly different appearance. For instance, if you use Internet Explorer, you see a **Browse** button which allows you to navigate to a location on your PC to a file you want to upload.

A browser window opens to allow you to navigate to a file on your PC that you want to upload.

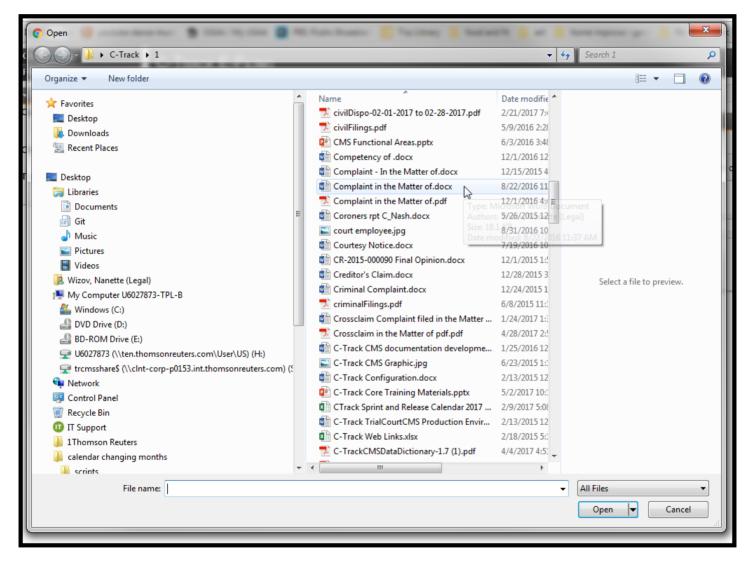


Fig. 1.66: Open browser window

- 31. Select the file you want to upload.
- 32. Click Open.

You return to the Upload Document screen. The document title appears to the right of the Choose File button.

MONROE COUNT	Jessica L Spencer Weitzmann, Weitzmann, & Huffman 🔻 🔎 👳	H		
FILING PROGRESS Party I	formation Filing Information	Upload Document Service Information	Filing Summary	
Upload Document				? 🗈
DOCUMENT -				
Name	Complaint - Complaint	File*	Choose File Complaint 1.docx	
Exclude from eService		Comments		
Request Confidential ^A		Confidential Reason	×	
Add Another				
			Previous	xt
		C-Track™ E-Filing, developed by Thomson Reuters Cou	rt Management Solutions	

PayPal

Fig. 1.67: Upload Document screen - file selected

33. Click Next.

The Service Information screen appears.

C-TRACK E-F	LING	_	_		Emily T deWolf Morse Lightner, AAL	- 7	,
FILING PROGRESS	Party Information Filin	g Information Upload Document	Service Information Filing Sum	mary			
Service Information]						? 🗈
ELECTRONIC SERV	VICE RECIPIENTS						
Name	Role	Representing	E-Mail Address	Service Method		_	
No records were found	d.						
Add Electronic Serv	vice Recipients						
NON-ELECTRONIC	SERVICE RECIPIENTS & UN	LINKED CASE PARTIES/PARTICIPANTS					
Name	Role	Representing	Address	Service Method	Service Date	_	
Lewis Roofing, LLC	Defendant		149 Porter St Essington PA 19029	▼ \$	ť	23 🗢	
Add Non-Electronic	c Service Recipients						
					Previous	s Ne	ext
		C-Track™ E-Filing, develope	d by Thomson Reuters Court Management S	olutions			
			PayPal				

Fig. 1.68: Service Information screen



The **Service Information** screen has three containers. The **Electronic Service Recipients** container displays parties or participants that have an email address on file in the CMS application or in the C-Track E-Filing application. The **Add Electronic Service Recipients** link lets you send email notification to other e-filers who are not parties or participants on the case, if needed. If the entity is not found through a search, you can add them with functionality that captures the Name and address of a Non E-Filer.

The **Non-Electronic Service Recipients** container will always require a **Service Method** option of Not Served, Conventional, or Electronic and a date.

The **Add Non-Electronic Service Recipients** link lets you send notification to other entities by adding the name and address for conventional (mail) service.

NOTE: The Apply to All icon that appears to the right of the
Service Method and Service Date fields lets you populate the fields
once, and select the icon if the selection applies to all Recipients.
The Date Picker icon lets you access a Calendar which lets
you select a month and day to populate the field. Additionally, C-
Track E-Filing lets you enter the letter C in any Date field to enter
today's day in the field. You can add days in the future by using the +
and numeral. For example, C+30 would populate the field with the
calendar day 30 days from today's date.

- 34. Select Service Method.
- 35. Enter Service Date.

C-TRACK E-	Filing			_	Emily T deWolf Morse Lightner, AAL	• 9) 岸
FILING PROGRESS	Party Information Filin	ng Information Upload Document	Service Information Filing Sum	mary			
Service Information	מ						? 🗈
ELECTRONIC SER	VICE RECIPIENTS						
Name	Role	Representing	E-Mail Address	Service Method		_	
No records were four	nd.						
Add Electronic Ser	rvice Recipients						
NON-ELECTRONIC	SERVICE RECIPIENTS & UI	NLINKED CASE PARTIES/PARTICIPANTS					
Name	Role	Representing	Address	Service Method	Service Date		
Lewis Roofing, LLC	Defendant		149 Porter St Essington PA 19029	Not Served V	03-19-2019	23 🗢	
Add Non-Electroni	c Service Recipients						
					Previou	is N	ext
		C-Track™ E-Filing, develope	d by Thomson Reuters Court Management So	olutions			



36. Click Next.

The Filing Summary screen appears.



C-TRACK E-FILING		-			_	Emily T deWolf Morse Lightner, AAL	• 🧏 🛓
FILING PROGRESS Party Inf	formation Filing	Information U	pload Document	Service Information Fili	ing Summary		
Filing Summary							? โ
CASE DETAILS 🔻							
Court Case Category Case Type Case Subtype	Delaware County Co Civil Contract Breach of Contract	ourt of Common Plea	as				
FILING INFORMATION							
Filing Number Filed on Behalf of Other Filed on Behalf of Amended	10062 JoAnne Carter			Type Comments Emergency Confidential	Complaint - Complaint Filed		
PARTY INFORMATION							
Name		Туре	Role	Address	Attorney(s)		
JoAnne Carter		Person	Plaintiff		Emily T deWolf		
Lewis Roofing, LLC		Organization	Defendant	149 Porter St Essington PA 19029			
DOCUMENTS Name Complaint - Complaint Filed		Confidential C	Confidential Reason	Exclude from eS	ervice Comments		
ELECTRONIC SERVICE REC Name	Role	Represe	ntina	E-Mail Address	Service Method		
No records were found.	Koic	Кергезе	nung	L-Mail Address			
NON-ELECTRONIC SERVICE	E RECIPIENTS & UNLI	NKED CASE PART	ES/PARTICIPANTS				
Name	Role	Represe	nting	Address	Service Method	Service Date	
Lewis Roofing, LLC	Defendant			149 Porter St Essington PA 19029	Not Served	03-19-2019	
FILING FEES Fee Name Complaint Filed							Amount \$208.24
Total							\$208.24
FILING FEES -							
Due From Comments	JoAnne Carter			Fees Not Required			
				I	Edit Filing Add Associated Filing	Add To Cart Delete	e This Filing
		C-Trs	ack™ E-Filing, developed	by Thomson Reuters Court Manag	gement Solutions		

Fig. 1.70: Filing Summary screen

The **Filing Summary** screen provides seven containers with a summary for all information entered on the previous E-Filing screens.

The **Edit Filing** button navigates back to the beginning of the Filing Progress – the **Party Information** screen where you can edit information or use the **Next** button to proceed through the screen(s) to the information that needs editing.

The **Add Associated Filing** button lets you add a separate filing that belongs to the same case. Associated filings appear as separate Registry of Action or Docket Entries on the case.

The Add To Cart button navigates to the Cart screen where you can review a summary of all filings in the Cart and see costs for any filings that are assessed.

The **Delete This Filing** moves the filing to the **Draft** queue where you can select a check box and delete the filing.

37. Click Add To Cart.

The Cart screen appears.

51

Monroe County, Pennsylvania Civil E	-Filing	_	ل با	lessica L Spencer Veitzmann, Weitzmann, & Huffman	- 宛	2 🗖
1 Information						
If fees are owed, you will be directed to a page to make your payment.						
Cart						? 🖸
SUMMARY -						
Number of Filings 1		Total	\$132.50			
FILINGS						
Court	Case Number	Filing Item(s)	Docu	ments	Fees	_
Monroe County Court of Common Pleas		Complaint - Compl	laint 1		\$132.50	×
1 to 1 of 1 records						
			By submitting the filing(s), you a	re agreeing to the E-Filing Term	is & Cond	litions
					Pay	Pal

C-Track™ E-Filing, developed by Thomson Reuters Court Management Solut

Fig. 1.71: Cart screen

The **Cart** screen has two containers: the **Summary** container shows the **Number of Filings** to be submitted and the **Total** cost.

The **Filings** container shows the **Court** in which the filings will be process. **Case Number** appears for filings on an existing case. Line items with no case number indicate a new case filing. The case number is auto generated in the C-Track CMS application. When you receive confirmation of a successful submission of the filing of a new case, you also receive the case number. The Filing Item(s) show the Registry of Action or Docket Entry that is added to the case in the C-Track CMS application when the filing is processed successfully. **Documents** indicate the number of documents attached or uploaded to the filing and **Fees** represent the cost the Prot assesses for each filing.

You can remove filings from the **Cart** by clicking the **X** at the far right of any line item. When you remove a filing from the **Cart** a **Confirm** window requires that you **OK** the removal. The filing is moved to the **Draft** queue, found through the left navigation menu, following the path **Filings > Draft**.

Note the Information message that appears above the Cart screen provides payment instruction information. The Cart icon

-

in the far-right top navigation bar reflects the addition of the filing to the Cart. Also note the **E-Filing Terms & Conditions** link at the bottom of the **Filings** container. Terms and Conditions information is also available when you register as an E-Filer.

38. Click Submit Filings.

Depending upon your Courts business process, you navigate to a payment screen where payment method information is captured. Once the information is successful saved and processed, the **Submission Confirmation** screen appears.



Jessica L Spencer Weitzmann, Weitzmann, & Huffman 🔹 👧 🏾		_	CIVIL E-FILING	, Pennsylvania	IONROE COUNTY
					Information
			processing.	been submitted for review and	Your electronic filings have
?					bmission Confirmation
:06 PM	03-22-2022 07:06 PM	Submitted Date		521647975941776 09C26384CK205014Y	E-File Confirmation # Payment Confirmation #
				030203040(2030141	ILINGS
Documents Fees	Filing Item(s)	Filing Number	Case Number		Court
1 \$132.50	Complaint - Complaint	10080		n Pleas	Monroe County Court of Common
\$132.50					Total
Documents 1			Case Number	ı Pleas	Monroe County Court of Common

C-Track[™] E-Filing, developed by Thomson Reuters Court Management Solutions PayPal

Fig. 1.72: Submission Confirmation screen

You have successfully submitted as electronic filing for a new case in the C-Track E-Filing application.

The Submission Confirmation screen has two containers: the Details container provides the E-File Confirmation Number, the Submission Date and the Payment Confirmation Number.

The Filings container shows an additional column to provide the Filing Number for each filing.

The **Print** button opens a separate browser window and lets you save or print a pdf of the **Submission Confirmation**. Additionally, the information is retained in the **Submitted** Queue and can be accessed at any time by following the menu path **Filings > Submitted** from the left navigation menu.

The **Cart** icon **i** in the top right screen banner, which had a red number showing the number of filings in the Cart throughout the process of creating a new case filing, is now empty.

Processing of the Submitted Filing happens through the C-Track CMS application and is performed by Prot personnel. Once processing is completed information about the success or failure of the submission will be sent back to your E-Filer Filing

queue. Information also appears in the **Notifications** icon **I** in the top right screen banner of every **C-Track E-Filing** screen.

Once the Court has processed the filing, you receive email notification regarding the filing similar to the notice shown below.



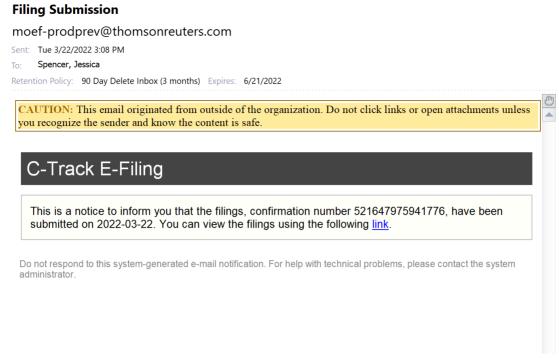


Fig. 1.73: Email Confirmation

The email you receive displays according to the specific email application with which you registered your E-File account.

If you click the view link from the email, you may be prompted to log into the E-Filing application. Once you are logged into E-File, the **Filing Summary** screen displays.

Case S		MONROE COUNT	y, Pennsylvan	NIA CIVIL E	E-Filing	_	_	Jessica L Weltzmann,	Spencer Woltzmann, & Huffman	<u>ଲ</u> 🗮
Create Filinge		Filing Summary								? 🖸
_	ig Information	CASE DETAILS -								
	Monroe County Court of Common Pleas	Court Case Category Case Type	Monroe County Court o Civil Tort	f Common Pleas						
	Civil - Tort - Intentional Tort Complaint -	Case Subtype	Intentional Tort							
	Complaint	FILING INFORMATION ~	10080				Complaint - Co			
		Filled on Behalf of Other Filed on Behalf of Amended Money Damages Class Action Suit	John Doe Outside of Arbitration Li	inits		Type Comments Emergency Confidential MDJ Appeal Pro Se	Comptaint - Co	mpiaint		
		ORIGINATING COURT INFOR Originating Court No records were found.	RMATION	Case #	Case Title	but	Igment	Related Cae	0 <i>#</i>	
		PARTY INFORMATION Name	Ţ	уре	Role	Address	At	torney(s)	_	-
		John Doe	P	lerson	Plaintiff	610 Monroe Street Stroudsburg PA 18360))	DD W WEITZMANN		
		Jane Doe	Ρ	lerson	Defendant	610 Main Street Stroudsburg PA 18360)			
		DOCUMENT\$ Name Complaint - Complaint	Request Con	fidential Co	onfidential Reason	Exclude from e	Service Comm	nente		B
		ELECTRONIC SERVICE REC Name	IPIENTS User Role	Represent	lina	E-Mall Address	Se	ervice Method		_
		No records were found.								
		NON-ELECTRONIC SERVICE	RECIPIENTS & UNLINK Party/Participant Role	ED CASE PARTIE Represent		Address	Se	arvice Method	Service Date	
		Jane Doe	Defendant	Self-Repres	ented	610 Main Street Stroudsburg PA 18360		t Served	03-22-2022	
		TODD W WEITZMANN	Attorney	John Doe (F	Plaintiff)		No	of Served	03-22-2022	
		FILING FEES Fee Name Intentional Tort								Amount \$132.50
		Total								\$132.60
		FILING FEES ~ Due From Comments	John Doe			Fees Not Required				
				C-Trac	k™ E-Filing, developed by T	homson Reuters Court Man	agement Solutions			

Fig. 1.74: Filing Summary screen

Additionally, any party that was served electronically with a successfully processed filling receives an email.

Once the filing is processed by the Prot, another email is sent. When the case is accepted and the case number is

automatically generated, the number is included in the email.

Filing Approval Case No. 000060-CV-2022

moef-prodprev@thomsonreuters.com

Sent: Tue 3/22/2022 3:16 PM

To: Spencer, Jessica

Retention Policy: 90 Day Delete Inbox (3 months) Expires: 6/21/2022

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

C-Track E-Filing

This is a notice to inform you that the filings filed in Case No. 000060-CV-2022 have been accepted by the Clerk on 2022-03-22. You can view this filing using the following link.

Do not respond to this system-generated e-mail notification. For help with technical problems, please contact the system administrator.

Fig. 1.75: Email Approval to E-Filer



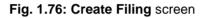
1.7 Submit an E-Filing on an existing case

In this example we create an e-filing to an existing case.

1. From the home screen, click Create Filing from the left menu.

The Create Filing screen appears.

Case Search Create Filing	C-TRACK E-FILING	Nina Lee Winslow 👻 🦙 🚝
Filings >	Create Filing	? 🖸
	COURT SELECTION ~ Court* Select a Court * Filing Category*	
	C-Track** E-Filing, developed by Thomson Reuters Court Management Solutions	Next
	C-Track - E-Filing, developed by Thomson Recite's Court Management Solutions	



- 2. Select a Court.
- 3. Select a Filing Category. Here, we select Existing Case.

The Existing Case container is added to the screen.

Monroe County, Pennsyl	VANIA CIVIL E-FILING	Jessica L Spencer Weitzmann, Weitzmann, & Huffman 🔻 🎅 🚮
1 Information		
 Caution!!! If you are submitting a filing to a pree leading zeroes are required. 	xisting case, please be sure to enter the case number correctly. For example, case number 1 CV 2	021 must be entered as follows: 000001-CV-2021. Dashes and
Create Filing		? ݣ
COURT SELECTION ~		
Court*	Monroe County Court of Common Pleas	
Filing Category*	Existing Case 🗸	
EXISTING CASE 👻		
Case Number*		
Filing Type*	v	
Filing Subtype*	v	
	C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions	Next

PayPal



4. Enter Case Number.



MONROE COUNTY, PENNSYLV	ania Civil E-Filing	Jessica L. Spencer Weitzmann, Weitzmann, & Huffman 🔻 宛 📊
1 Information		
 Caution!!! If you are submitting a filing to a preexi leading zeroes are required. 	sting case, please be sure to enter the case number correctly. For example, case number 1 CV 2021 must	be entered as follows: 000001-CV-2021. Dashes and
Create Filing		? ర్
COURT SELECTION -	Manue Quark Quark of Querman Plans	
Filing Category*	Monroe County Court of Common Pleas Existing Case	
EXISTING CASE -		
Case Number*	16cv2014	
Filing Type*		
Filing Subtype*	▼	
		Next
	C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions	

PayPal

Fig. 1.78: Create Filing screen - Existing Case error

If you enter a Case number for a case that does not exist, enter the case number incorrectly/incompletely, or enter a number for a Confidential case upon which you are not permitted to file, the **Case Number** field displays with a red outline and the **Filing Type** and **Filing Subtype** fields do not populate with drop down values, as shown above.

- 5. Select Filing Type.
- 6. Select Filing Subtype.

MONROE COUNTY, PE	ennsylvania Civil E-Filing	Jessica L Spencer Weitzmann, Weitzmann, & Huffman 🔻 宛 🚼
1 Information		
 Caution!!! If you are submitting a fi leading zeroes are required. 	ling to a preexisting case, please be sure to enter the case number correctly. F	or example, case number 1 CV 2021 must be entered as follows: 000001-CV-2021. Dashes and
Create Filing		? 1
COURT SELECTION -		means the system
Court*	Monroe County Court of Common Pleas	recognizes the Case
Filing Category*	Existing Case 🗸	Number as an existing
EXISTING CASE -		case.
Case Number*	000016-cv-2014	
Filing Type*	Answer 🗸	
Filing Subtype*	Answer and New Matter	
		Next
	C-Track™ E-Filing, developed by Thomson Reuters	

PayPal

Fig. 1.79: Create Filing screen – Existing Case

7. Click Next.

The **Filing Information** screen appears. Additionally, the filing has been moved to the **Draft Filing Queue** which you can access from the **Filings > Draft** left menu option. If you navigate away from the filing, you can return to it by selecting it from

the Filings display table on the Draft Filing Queue screen.

Admin Case S	istration 🕨 🕨	Monr	OE COUNT	Y, PENN	NSYLVANIA (CIVIL E-F	FILING	-	-		Jessica L Spencer Weitzmann, Weitzmann, & Huffman	• •	29 🗮	
Create Filings		FILING PRO	GRESS Filing In	formation	Upload Docume	nt Servic	e Information	Filing Summa	ary					
- Cas	e Information	Filing Info	rmation										?	2
Court	Monroe County Court of Common Pleas	DETAILS											_	
Case	000016-CV-2014	Comme	ents											
	Civil - Tort - Motor Vehicle	Emerge	ency					Amended						
Short Title	ACKERMAN JASMINE v. COLLAZO RUBEN	Confide	ential											
Status	Closed	FILER INF	FORMATION -											
	Unsubscribe	Filed or	n Behalf of^	Value	e	_	_	_		_				
	Olisubscribe			JASN	/INE ACKERMAN								^	
- Filir	g Information			RUBE	EN COLLAZO									
Court	Monroe County Court of Common Pleas			MICH	IELLE SNYDER									
Class	of Common Pleas Civil - Tort - Motor			I JOH	N SNYDER									
Class	Vehicle			ALLS	TATE FIRE AND CASU	JALTY INSURAN	NCE COMPANY						•	
Туре	Answer - Answer and New Matter	Other F	iled on Behalf of^											
													Next	
					C-T	rack™ E-Filing,		omson Reuters Court	Manageme	ent Solutions				

Fig. 1.80: Filing Information screen

Since we are e-filing on an existing case, Party information has already been entered on the case. We see the **Case Information** container in the left menu. Additionally, the **Filing Progress** Indicator does not contain a Party Information element. Also, a **Filing Fee** container only appears when the Court assesses a fee for this filing type.

The **Details** container lets you indicate if the filing is an **Emergency**, an **Amended** filing or is **Confidential** by selecting any of the check boxes. The **Confidential** check box here makes the filing itself confidential, not the case as a whole. You can also add a **Comment** to the filing.

The Filer Information container lets you identify the entity(s) for whom you are filing.

- 8. Select a Filed on Behalf of check box in the Filer Information container.
- 9. Complete other information, as needed.
- 10. Click Next.

58

The Upload Document screen appears.

MONROE COL	jnty, Pennsylvania Civ	IL E-FILING		Jessica L Spencer Weitzmann, Weitzmann, & Huffman	- 宛	-
FILING PROGRESS Fil	ing Information Upload Document	Service Information Filing Summa	ry			
Upload Document					?	2
DOCUMENT -						
Name	Answer - Answer and New Matter	File*	Choose File No file chosen			
Exclude from eServi	ce 🗌	Comments				
Request Confidentia	IA 🗌	Confidential Reason*	v			
Add Another						
				Previou	IS Next	
	C-Track⊺	E-Filing, developed by Thomson Reuters Court PayPal	Management Solutions			

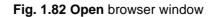
Fig. 1.81 Upload Document screen

When you specify **Request Confidential**, you must identify a **Confidential Reason** – here you are specifying the Document itself, as opposed to the whole case or the filing, is Confidential.

11. Click Choose File.

A browser window opens to allow you to navigate to a file on your PC that you want to upload.

· · · · C-Track → 1			✓ [↓] → Search :	1		ρ
rganize New folder						chosen
Favorites	Name	Date	Туре	Size	Tags	A
Downloads	Predisposition of C	10/5/2016 10:54 AM	Microsoft Word D	21 KB		
Recent Places	-	4/3/2017 4:38 PM	Microsoft Word D	2,520 KB		7
📃 Desktop	💼 Proposed Order - O	3/22/2018 6:21 PM	Microsoft Word D	12 KB		
Oreative Cloud Files	QWERTY.docx	8/28/2015 3:30 PM	Microsoft Word D	17 KB		
	剧 receipt-181.pdf	11/10/2015 3:52 PM	Adobe Acrobat D	27 KB		Previo
Desktop	💼 Report of Financial	5/2/2017 4:09 PM	Microsoft Word D	22 KB		
🛜 Libraries	💼 Report of James Ma	11/28/2016 3:45 PM	Microsoft Word D	23 KB		
Documents	Request for Admissi		Microsoft Word D	22 KB		
🚮 Git	Request for Product	11/20/2015 4:13 PM	Microsoft Word D	18 KB		
👌 Music	💼 Request for Product		Microsoft Word D	131 KB		
E Pictures	💼 Request for Product	8/22/2016 12:22 PM	Microsoft Word D	19 KB		
Videos	Request for Product	8/29/2016 4:51 PM	Adobe Acrobat D	26 KB		
Wizov, Nanette (Government)	📔 request SaraBeth.jpg	6/24/2016 12:50 PM	JPEG image	57 KB		
I툎 My Computer U6027873-TPL-B	🙈 Response to Disclos	6/22/2015 3:29 PM	Adobe Acrobat D	28 KB		
🏭 Windows (C:)	🔊 Results of DNA test	9/23/2016 5:20 PM	Adobe Acrobat D	7 KB		
🔮 DVD Drive (D:)	🔄 Rules Engine Graphi	11/7/2014 10:41 AM	JPEG image	653 KB		
BD-ROM Drive (E:)	💼 Rules engine v1.docx	3/4/2015 5:00 PM	Microsoft Word D	19 KB		=
P U6027873 (\\ten.thomsonreuters.com\User\US) (H:)	🖺 sched tasks utility.jpg	5/13/2015 10:55 AM	JPEG image	193 KB		
🖙 trcmsshare\$ (\\clnt-corp-p0153.int.thomsonreuters.com) (!	Service of Discovery	4/24/2017 10:32 AM	Microsoft Word D	22 KB		
🗣 Network	📹 Statements in the	5/2/2017 1:36 PM	Microsoft Word D	22 KB		-
💷 Control Panel		10 (2 (2017 0 42 DM	14° 0.147 U.S.	22 KB	•	



- 12. Select the file you want to upload.
- 13. Click Open.

NOTE: The Court determines the maximum file size of documents that can be upload in an e-Filing submission. For Monroe County, the upload limit is 25MB. Any documents larger than 25 MB will need to be split and uploaded in multiple parts.
 You must save larger documents in parts or sections and use the Add Another link at the bottom left of the Upload Document container to upload all documents of the filing.

You return to the Upload Document screen. The document title appears to the right of the Choose File button.

Monroe Coui	NTY, PENNSYLVANIA CIV	IL E-FILING	Jessica L Spe Weitzmann, Wei	ncer Izmann, & Huffman 🔻 <u>२</u> 📜
FILING PROGRESS Filin	g Information Upload Document	Service Information Filing Summ	ary	
Upload Document				? 🗅
DOCUMENT -				
Name	Answer - Answer and New Matter	File*	Choose File Answer and New Matter.docx	
Exclude from eService		Comments		
Request Confidential^		Confidential Reason^	~	
Add Another				
				Previous Next
	C-Track ¹	E-Filing, developed by Thomson Reuters Cour PayPal	t Management Solutions	

Fig. 1.83: Upload Document screen - file selected

- 14. Complete any Confidentiality information, as needed.
- 15. Click Next.

The Service Information screen appears.

NG PROGRESS Filin	g Information Upload I	Document Service Information	Filing Summary		
vice Information		_			:
LECTRONIC SERVICE	RECIPIENTS				
lame	User Role	Representing	E-Mail Address	Service Method	
VEITZMANN, TODD W	Attorney		jejones@monorepacourts.us	~ 🕈	
dd Electronic Service F	Recipients				
ON-ELECTRONIC SER	VICE RECIPIENTS & UNLINA Party/Participant Role	ED CASE PARTIES/PARTICIPANTS Representing	Address	Service Method	Service Date
COLLAZO, RUBEN	Defendant	Self-Represented	1404 HEMLOCK DRIVE POCONO SUMMIT PA 18346	~	23
NYDER, MICHELLE	Defendant	Self-Represented	9157 BRANDYWINE DRIVE TOBYHANNA PA 18466	~	23
NYDER, JOHN	Defendant	Self-Represented	9157 BRANDYWINE DRIVE TOBYHANNA PA 18466	~	23
TEHLIN, CATHERINE	Attorney	ALLSTATE FIRE AND CASUALTY INSURANCE COMPANY (Defendant)	ONE WEST BROAD STREET SUITE 700 BETHLEHEM PA 18018	~	23
IERMAN, KENT	Attorney	ALLSTATE FIRE AND CASUALTY INSURANCE COMPANY (Defendant)	KING SPRY HERMAN FRUEND & FAUL ONE WEST BROAD ST #700 BETHLEHEM PA 18018-5765	~	23
ISANCHYN, MICHAEL	Attorney	ACKERMAN, JASMINE (Plaintiff)	524 SPRUCE STREET SCRANTON PA 18503	~	23

Fig. 1.84: Service Information screen

Here, the filer wants to include electronic service for an attorney who is not a party or participant to this case but is a registered e-File user.

16. Click the Add Electronic Service Recipients link.

The Add Electronic Service Recipients window appears



ING PROGRESS Fili	ng Information Uplo	oad Document Service Information	Filing Summary			
ING FROGRESS TH	ng momaton opic	Service information	Thing Summary			
ervice Information	Add Electronic Servic	e Recipients	2 ×			? ဦ
ELECTRONIC SERVI Name WEITZMANN, TODD W Add Electronic Servi	do so, enter the na	ers can be added as electronic service recipio ame (or part of the name) of an E-File User, c ult record associated with the E-File User you recipient	lick the Search button, and then click	Service Method	_	
NON-ELECTRONIC S Name COLLAZO, RUBEN	SEARCH FOR E-FILER			Service Method	Service Date	
SNYDER, MICHELLE	First Name Middle Name			~	23	
SNYDER, JOHN	Last Name*			~	23	
STEHLIN, CATHERINE			Search Cancel	~	23	
HERMAN, KENT	Attorney	ALLSTATE FIRE AND CASUALTY INSURANCE COMPANY (Defendant)	KING SPRY HERMAN FRUEND & FAUL ONE WEST BROAD ST #700 BETHLEHEM PA 18018-5765	~	23	
PISANCHYN, MICHAEL	Attorney	ACKERMAN, JASMINE (Plaintiff)	524 SPRUCE STREET SCRANTON PA 18503	~	23	

Fig. 1.85: Add Electronic Service Recipients window

The Add Electronic Service Recipients window has a single Search for E-filers container that lets you search for other authorized e-Filers you want to include for service.

- 17. Enter search criteria.
- 18. Click Search.

dd Electronic Service	Recipients	23
i Information		
To do so, enter the	rs can be added as electronic service recipi name (or part of the name) of an E-File Use result record associated with the E-File Use vice recipient.	er, click the Search button, and then
EARCH FOR E-FILER		
First Name Middle Name		
Last Name*	tz	
		Search Cancel
EARCH		
Name 🔺	E-Mail Address	Legal Organization
entz, helen	HLentz@monroecountyPa.gov	
Tzanova, Anna	anna.tzanova@tr.com	

Fig. 1.86: Add Electronic Service Recipients window - Search result appears

19. Select the e-Filer you want to include for electronic service from the Search display table.

You return to the Service Information screen and the e-Filer is added to the Electronic Service Recipients table

- 20. Select Service Method for Electronic Service and / or Conventional Service Recipients, as needed.
- 21. Enter Service Date for Conventional Service Recipients, as needed.

ING PROGRESS Filin	ng Information Upload I	Document Service Information	Filing Summary		
rvice Information					
LECTRONIC SERVICE	RECIPIENTS				
Name	User Role	Representing	E-Mail Address	Service Method	
WEITZMANN, TODD W	Attorney		jejones@monorepacourts.us	eService 🗸 🕈	
zanova, Anna	Pro Se		anna.tzanova@tr.com	eService 🗸	
ON-ELECTRONIC SER		KED CASE PARTIES/PARTICIPANTS Representing	Address	Service Method	Service Date
dd Electronic Service I ON-ELECTRONIC SER Vame	VICE RECIPIENTS & UNLIN		Address	Service Method	Service Date
ON-ELECTRONIC SER	VICE RECIPIENTS & UNLIN		Address 1404 HEMLOCK DRIVE POCONO SUMMIT PA 18346	Service Method	Service Date
ON-ELECTRONIC SER Name COLLAZO, RUBEN	VICE RECIPIENTS & UNLIN Party/Participant Role	Representing	1404 HEMLOCK DRIVE		557755
ON-ELECTRONIC SER Name COLLAZO, RUBEN SNYDER, MICHELLE	VICE RECIPIENTS & UNLINE Party/Participant Role Defendant	Representing Self-Represented	1404 HEMLOCK DRIVE POCONO SUMMIT PA 18346 9157 BRANDYWINE DRIVE	~	23
ON-ELECTRONIC SER Jame COLLAZO, RUBEN SNYDER, MICHELLE SNYDER, JOHN	VICE RECIPIENTS & UNLINF Party/Participant Role Defendant Defendant	Representing Self-Represented Self-Represented	1404 HEMLOCK DRIVE POCONO SUMMIT PA 18346 9157 BRANDYWINE DRIVE TOBYHANNA PA 18466 9157 BRANDYWINE DRIVE	~ ~	23
ON-ELECTRONIC SER Jame	VICE RECIPIENTS & UNLINF Party/Participant Role Defendant Defendant Defendant	Representing Self-Represented Self-Represented Self-Represented ALLSTATE FIRE AND CASUALTY	1404 HEMLOCK DRIVE POCONO SUMMIT PA 18346 9157 BRANDYWINE DRIVE TOBYHANNA PA 18466 9157 BRANDYWINE DRIVE TOBYHANNA PA 18466 ONE WEST BROAD STREET SUITE 700	· · · · · · · · · · · · · · · · · · ·	2

Fig. 1.87: Service Information screen - input complete

22. Click Next.



The Filing Summary screen appears.

nistration Search	MONROE COUNT	Y, PENNSYI	VANIA CIVIL I	E-FILING		Jessica L Weitzmann	_ Spencer n, Weitzmann, & Huffman 🔻 🛛 宛
e Filing	FILING PROGRESS Filing Ir	formation Uni	oad Document S	ervice Information	iling Summary		
s		ionnation opt			and gounnary		
se Information	Filing Summary						
Monroe County C	urt CASE DETAILS -						
of Common Pleas 000016-CV-2014	Court	Monroe County C	Court of Common Pleas				
Civil - Tort - Motor	Case Category	Civil					
Vehicle	Case Type	Tort					
ACKERMAN	Case Subtype	Motor Vehicle					
JASMINE v. COLLAZO RUBEI	FILING INFORMATION -						
Closed	Filing Number	10081			Туре	Answer - Answer and New Matter	
Unsubscribe	Filed on Behalf of	ALLSTATE FIRE	AND CASUALTY INSU	RANCE COMPANY	Comments		
	Other Filed on Behalf of Amended				Emergency Confidential		
ng Information	Money Damages				MDJ Appeal		
Monroe County Co of Common Pleas	Class Action Suit				Pro Se		
Civil - Tort - Motor	PARTY INFORMATION						
Vehicle	Name		Туре	Role	Address	Attorney(s)	
Answer - Answer a New Matter	JASMINE ACKERMAN		Person	Plaintiff	209 KRESTREL DRIVE MOUNT POCONO PA 18344	MICHAEL J PISANCHYN	I, JR
	RUBEN COLLAZO		Person	Defendant	1404 HEMLOCK DRIVE POCONO SUMMIT PA 18346		
	MICHELLE SNYDER		Person	Defendant	9157 BRANDYWINE DRIVE TOBYHANNA PA 18466		
	JOHN SNYDER		Person	Defendant	9157 BRANDYWINE DRIVE TOBYHANNA PA 18466		
	ALLSTATE FIRE AND CASUAL COMPANY	TY INSURANCE	Organization	Defendant		CATHERINE L STEHLIN KENT HERMAN	
	DOCUMENTS						
	Name	Reques	st Confidential C	onfidential Reason	Exclude from eService	Comments	
	Answer - Answer and New Matt	er					
	ELECTRONIC SERVICE REC						
	Name	User Role	Represen	ting	E-Mail Address	Service Method	
	TODD W WEITZMANN	Attorney			jejones@monorepacourts.us	eService	
	Anna Tzanova	Pro Se			anna.tzanova@tr.com	eService	
	NON-ELECTRONIC SERVIC	E RECIPIENTS & UN	ILINKED CASE PARTI	ES/PARTICIPANTS			
	Name	Party/Participant	Role Represen	ting	Address	Service Method	Service Date
	COLLAZO, RUBEN	Defendant	Self-Repres	sented	1404 HEMLOCK DRIVE POCONO SUMMIT PA 18346	Not Served	03-22-2022
	SNYDER, MICHELLE	Defendant	Self-Repres	sented	9157 BRANDYWINE DRIVE TOBYHANNA PA 18466	Not Served	03-22-2022
	SNYDER, JOHN	Defendant	Self-Repres	sented	9157 BRANDYWINE DRIVE TOBYHANNA PA 18466	Not Served	03-22-2022
	STEHLIN, CATHERINE	Attorney	ALLSTATE	FIRE AND CASUALTY E COMPANY (Defendant)	ONE WEST BROAD STREET SUITE 700 BETHLEHEM PA 18018	Not Served	03-22-2022
	HERMAN, KENT	Attorney	ALLSTATE	FIRE AND CASUALTY CE COMPANY (Defendant)	KING SPRY HERMAN FRUEND ONE WEST BROAD ST #700 BETHLEHEM PA 18018-5765) & FAUL Not Served	03-22-2022
	PISANCHYN, MICHAEL	Attorney	ACKERMA	N, JASMINE (Plaintiff)	524 SPRUCE STREET SCRANTON PA 18503	Not Served	03-22-2022

Fig. 1.88: Filing Summary screen

Review the Filing Summary screen to ensure the information you are submitting.

23. Click Add to Cart.

The Cart screen appears.

Monroe County, Pennsylvani	CIVIL E-FILING	_		Jessica L Spencer Weitzmann, Weitzmann, & Hui	liman 🔻 👧 😽	
1 Information						
 If fees are owed, you will be directed to a page to make y 	our payment.					
Cart					?	ð
SUMMARY -						
Number of Filings 1		Total	\$0.00			
FILINGS						
Court	Case Number	Filing Item(s)		Documents	Fees	
Monroe County Court of Common Pleas	000016-CV-2014	Answer - Answer and	1 New Matter	1	\$0.00 🗙	
1 to 1 of 1 records						
			By submitting the filing	s), you are agreeing to the E-Filing	g Terms & Condition	s
					Submit Filings	
	C-Track™ E-Filing, developed	by Thomson Reuters Court M	lanagement Solutions			

Fig. 1.89: Cart screen

24. Click Submit Filings.

You navigate to a payment screen where payment method information is captured. Once the information is successful saved and process, the **Submission Confirmation** screen appears.

Monroe County, Pennsylvania	CIVIL E-FILING	_	_	Jessica L Spencer Weitzmann, Weitzmann, & Huffman	- 50	!
1 Information						
Your electronic filings have been submitted for review and	processing.					
Submission Confirmation						? 🗈
DETAILS -						
E-File Confirmation # 521647978820543		Submitted Date	03-22-2022 07:53 PM			
FILINGS						
Court	Case Number	Filing Number	Filing Item(s)		Documents	
Monroe County Court of Common Pleas	000016-CV-2014	10081	Answer - Answer and New Matter		1	
					Prin	t
C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions						

Fig. 1.90: Submission Confirmation screen

You have successfully submitted as electronic filing for an existing case in the C-Track E-Filing application.

Processing of the Submitted Filing is performed by Prot personnel in the C-Track CMS application. Once processing is completed information about the success or failure of the submission is sent back to your E-Filer **Filing** queue. Information also appears in the **Notifications** icon in the top right screen banner of every **C-Track E-Filing** screen. Additionally, the Prot may send an email to the email address associated to your user account.

Once the Prot has processed the filing, you receive email notification regarding the successful or failure of the filing. The email you receive displays according to the specific email application with which you registered your E-File account.

Additionally, any party that was served electronically with a successfully processed filling receives an email notification.

1.8 Support Staff Completes a Draft Filing

When your Legal Organization Administrator associates another member of your Legal Organization to your E-File Account, and makes them an Authorized E-Filer in the Support Staff capacity, this allows them access to all filings available through your Filings menu, including filings in Draft status. By associating support staff, this creates a proxy relationship where the support staff acts on behalf of an authorized e-Filer to submit filings and complete filings in Draft status. Remember, Support Staff must also be authorized E-Filers – they register in e-File without a Bar ID.

You cannot associate support staff to your Personal Account, they must choose a Legal Organization in which your association is active.

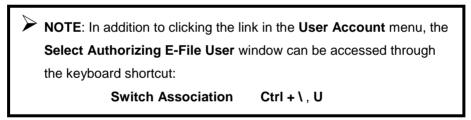
In the example, a member of a Legal Organization who works in support of attorney's associated their E-File account to an attorney and completes a filing from Draft status and submits the filing to the Court.

1. Select the down arrow to the right of your Username in the top banner navigation.

The User Account options appear.

Case Search Create Filing	Monroe County, Pennsylvania Civil E-Filing	Jessi	ca Spencer 👻	
Filings	Home	User Account		? 🛍
		My Account	Ctrl + A	\$
		My Organizations	Ctrl + O	
	C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions	Switch Association	Ctrl + U	
	PayPal	My Subscriptions	Ctrl + S	
		Logout	Ctrl + L	

Fig. 1.91: User Account options exposed



2. Select the Switch Association link.

The Select Association window appears.

Monroe Count	y, Pennsylvania Civ	/IL E-FILING		Jess	ica Spencer 👻	
Home				User Account		? โ
	Select Association		2 ×	My Account My Organizations Switch Association	Ctrl + \ , A Ctrl + \ , O Ctrl + \ , U	\$
	ASSOCIATIONS - Legal Organization	Personal Account	×	My Subscriptions Logout	Ctrl + \ , S Ctrl + \ , L	
		_	Save Cancel			

Fig. 1.92: Select Authorizing E-File User window

3. From the Legal Organization drop down, select your organization.

With the selection of the Legal Organization, the Authorizing Efile User drop down appears.

Monroe Coun	nty, Pennsylvania	Civil E-Filing			Jessica Spencer 👻 🏓 🗮
Home					? 🖸
((Select Association		1	*	\$
	ASSOCIATIONS - Legal Organization Authorizing User	Weitzmann, Weitzmann, & Huffman TODD W WEITZMANN V TODD W WEITZMANN	Save Cancel		

Fig. 1.93: Select Association window - Authorizing User drop down

- 4. From the **Authorizing User** drop down, select the E-Filer for whom you are filing.
- Note this user is authorized to file on behalf of three attorney users.
- 5. Click Save.

You return to the **Home** screen. Your Authorized E-File User appears below your user login and the Legal Organization appears below your Authorized E-File User in the upper right top banner.

Case Search Create Filing		y, Pennsylvania Civil E-Filing	Jessica Spencer TODD W WEITZMANN Weitzmann, & Huffman	▶ ≒
Filings >	Approved (0)			
	Draft (1)			? 🔁
	Error (0)		The Support Staff e-filer has access	\$
	Rejected (0)		to the Filings menu of the Authorized	
	Submitted (0)	C-Track™ E-Filing, developed by Thomson Reuters C	e-Filer to whom they are associated.	
		PayPal		

Fig. 1.94: Home screen with Authorizing E-Filer functionality

6. Select Filings > Draft from the left navigation.

The **Draft Filing Queue** screen appears. All filings for the **Authorizing E-Filer** that have a draft status appear. If the **Authorizing E-Filer** was logged into the E-File application, the screen would display identical information.

Monroe Count	ry, Pennsylvani	A CIVIL E-FILING	_	-	Jessica Spencer TODD W WEITZMANN Weitzmann, Weitzmann, & Hui	ttman 🔹 🗩 📜
Draft Filing Queue						? 🎦
COURT SELECTION -						
Court	Select a Court	-				
SEARCH -						
Case Number						
Case Category	*		Filing Type		~	
Case Type	~		Filing Subtype	~		
						Search
FILINGS						
Case Number A	Fil	ng Type			Last Modified	
	Co	nplaint - Complaint			03-23-2022 01:28 PM	
1 to 1 of 1 records		e is no case num s the draft filing is case filing.	s a new		Add 1	to Cart Delete
			s Court Mana	gement Solutions		

Fig. 1.95: Draft Filing Queue screen

The **Draft Filing Queue** screen displays three containers. The **Court Selection** container lets you identify a single Court for which you can view Draft Filings, since E-Filing supports filings in multiple Courts.

The Search container lets you enter criteria of Case Number, Case Category, Filing Type, and Filing Subtype upon which you can search.

The **Filings** display table shows all filings in the Draft queue by default. Since this filer has a single filing there is no need to use the Search function to find a filing.

The check box to the left of the **Case Number** can select individual filings for use with the **Add to Cart** button or the **Delete** button.

The check box in the header of the Filings display table selects all cases in the display table for use with the **Add to Cart** button or the **Delete** button.

The **Delete** button produces a **Confirm** window that requires you confirm the deletion of the filing. When you confirm the deletion, the filing is deleted from the **Draft Filing Queue** screen and is not recoverable.

The **Case Number** column of the **Filings** display table can be selected to navigate to the **Case View** screen to provide an overview of case information.

The Filing Type and Last Modified columns can be selected to navigate to the Filing Summary screen.

Within the **Filings** display table, the **Case Number** column can be selected to navigate to the **Case View** screen and the **Filing Type** and **Last Modified** columns can be selected to navigate to the **Filing Summary** screen.

7. Click the Back button of your browser to return to the Draft Filing Queue screen.

Monroe Count	y, Pennsylv	ania Civil E-Filing	Jessica Spencer TODD W WEITZMANN Weitzmann, Weitzmann, & Huffman
Draft Filing Queue COURT SELECTION ~ Court	Select a Court	v	Since this draft filing is for a new case, click this area of the line item to access the Filing Summary screen.
SEARCH - Case Number Case Category Case Type	* *		Filing Type ~ Filing Subtype ~
FILINGS ■ Case Number ▲		Filing Type Complaint - Complaint	Last Modified 03-23-2022 01:28 PM
Case Num	ling on an existin ber displays and e Filing Summa r	you click to	Add to Cart Delete

Fig. 1.96: Draft Filing Queue screen

8. Click the **Filing Type** area of the Filings display table line item.



The Filing Summary screen appears.

Case Search Create Filing Filings ▶	Monroe County, Pennsylvania Civil E-Filing	Jessica Spencer TODD W WEITZMANN Weitzmann, Weitzmann, & Huffman
➡ Filing Information	FILING PROGRESS Party Information Filing Information Upload Document	Service Information Filing Summary
Court Monroe County Court of Common Pleas	Filing Summary	? ป
Class Family - Divorce - Divorce with 1 Count Type Complaint - Complaint	CASE DETAILS ~ Court Monroe County Court of Common Pleas Case Category Family Case Type Divorce Case Subtype Divorce with 1 Count	Select any Filing Progress tab to return to the selected screen to update information.
	FILING INFORMATION ~ Filing Number 10084 Filed on Behalf of Other Filed on Behalf of Amended Money Damages Class Action Suit	Type Complaint - Complaint Comments Emergency Confidential MDJ Appeal Pro Se Pro Se
	ORIGINATING COURT INFORMATION Originating Court Case # Case Ti No records were found.	tle Judgment Related Case #
	PARTY INFORMATION Name Type Role Jane Doe Person Plaintiff	Address Attorney(s) 123 Main Street TODD W WEITZMANN Anywhere PA 18360 TODD W WEITZMANN
	DOCUMENTS Request Confidential Confidential Reason No records were found. ELECTRONIC SERVICE RECIPIENTS ELECTRONIC SERVICE RECIPIENTS Name User Role Representing No records were found. Non-ELECTRONIC SERVICE RECIPIENTS & UNLINKED CASE PARTIES/PARTICIPANTS NON-ELECTRONIC SERVICE RECIPIENTS & UNLINKED CASE PARTIES/PARTICIPANTS Name Party/Participant Role No records were found.	Select Edit E-Filing to return to the beginning of the filing. Mote you must re-upload all document on the Upload Documents tab. When you select Edit E-Filing, all documents are removed from the filing.
	FILING FEES Fee Name Divorce Filing 1 Total FILING FEES ~ Due From Comments	Amount S138.50 S138.60 Fees Not Required Edit Filing Add Associated Filing Add To Cart Delete This Filing
	C-Track™ E-Filing, develope	Edit Filing Add Associated Filing Add To Cart Delete This Filing ad by Thomson Reuters Court Management Solutions

Fig. 1.97: Filing Summary screen

Review the **Filing Summary** screen to ensure the information you are submitting. Return to any screen to update information before you submit the filing

9. Click Add to Cart.

The Cart screen appears.

Note if you have additional filings already in the Cart when you associated to the Authorizing E-File User those filings also appear.
 The X at the far right of any line item in the Filings display table lets you remove filings from the Cart and return the filing(s) to the Draft queue in the left menu.

Monroe County, Pennsylvania Civil E-Filing	Jessica Spencer TODD W WEITZMANI Weitzmann, G	
Information If fees are owed, you will be directed to a page to make your payment.	X removes any filing from the Cart and retains the Filing in the Draft menu option.	
Cart		? 🖸
SUMMARY -	$\overline{}$	
Number of Filings 1 To	iotal \$138.50	
FILINGS		
Court Case Number	Filing Item(s) Documents	1.2
Monroe County Court of Common Pleas	Complaint - Complaint 1	\$138.50
1 to 1 of 1 records		
	By submitting the filing(s), you are agreeing to the E-F	iling Terms & Conditions
		PayPal
C-Track™ E-Filing, developed by Thomson	n Reuters Court Management Solutions	

PayPal

Fig. 1.98: Cart screen - filings ready for Submission

10. Click **X** for the filing you want to remove.

A Confirm window appears.

Monroe County, Pennsy	YLVANIA CIVIL E-FILING		Jessica Spencer TODD W WEITZM Weitzmann, Weitzma	
f Information				
• If fees are owed, you will be directed to a pa	ge to make your payment.			
Cart			_	? ป็
SUMMARY		Total	\$138.50	
FILINGS Court	Case Number	Eiling Item(s)	Documents	Fees
Monroe County Court of Common Pleas	Confirm	× - Complaint	1	\$138.50 🗙
1 to 1 of 1 records	Are you sure you want to remove this item?	Cancel	submitting the filing(s), you are agreeing to the	E-Filing Terms & Conditions
	C-Track™ E-Filing, developed by Tho	mson Reuters Court Manageme PayPal	nt Solutions	

Fig. 1.99: Confirm window – Remove a filing from the Cart

11. Click Cancel.

12. Click the payment button or the Submit Filings.

The Submission Confirmation screen appears. Note the Cart icon shows no filings.

Monroe County, Pennsylvania Ci	VIL E-FILING	_	_	Jessica Spencer TODD W WEITZMANN Weitzmann, Weitzmann, & Huffman	7 🗮	
Information						
Your electronic filings have been submitted for review and proc	essing.					
Submission Confirmation					? 🛍	
DETAILS ~						
E-File Confirmation # 611648044863184 Payment Confirmation # 7UB27992LG033225F		Submitted Date	03-23-2022 02:15 PM			
FILINGS						
Court	Case Number	Filing Number	Filing Item(s)	Documents	Fees	
Monroe County Court of Common Pleas		10084	Complaint - Complaint	1	\$138.50	
Total					\$138.50	
					Print	
C-Track™ E-Filing, developed by Thomson Reuters Court Management Solutions						

Fig. 1.100: Submission Confirmation screen – Successful submission

You have successfully submitted a filing on behalf of another authorized E-Filer in your legal organization. The **Green Success Notification** displays in the top content container, above the **Submission Confirmation** screen.

As a support staff user, the **Notification** icon and **Notifications** screen is updated with confirmation of a successfully submitted e-filing. Once the court processes the e-filing the Authorizing E-Filer, for whom you submitted the filing, receives an email.



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