VIRGIN ISLANDS JUDICIARY E-FILING SYSTEM

E-FILING USER GUIDE

CONTENTS

ABOUT THIS DOCUMENT

INTENDED READERSHIP

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

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 a Court 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 and to enable Matter Number sharing within a Legal Organization.

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 E-Filers 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. Legal Organizations can use Matter Numbers, a unique number internal to their organization, to allow authorized users access to filing information based upon those numbers. 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. Filings submitted when the E-Filer is associating filings to the Legal Organization can be saved as a draft and completed by other E-Filers of the Legal Organization who have authority through the Matter Number associated to the filing. Support Staff can also be included as Legal Organization members. Attorneys can associate Support Staff through the User Association screen. Support Staff can file on behalf of authorized E-Filer permission but, do not need to have Matter Number permission to file.

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.

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

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

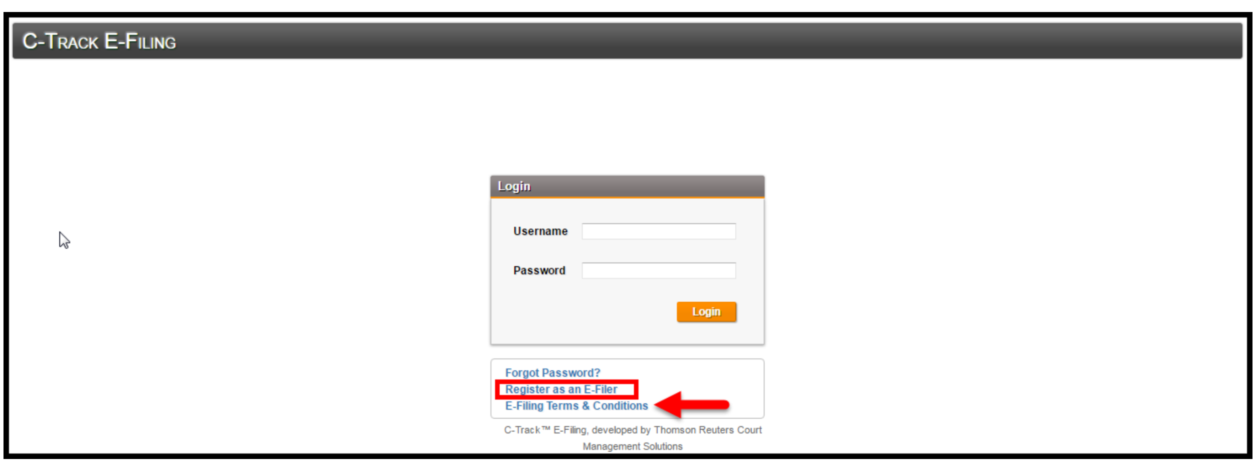

Fig. 1.1: E-File Registration / Log In screen

The **E-File Registration** screen appears.

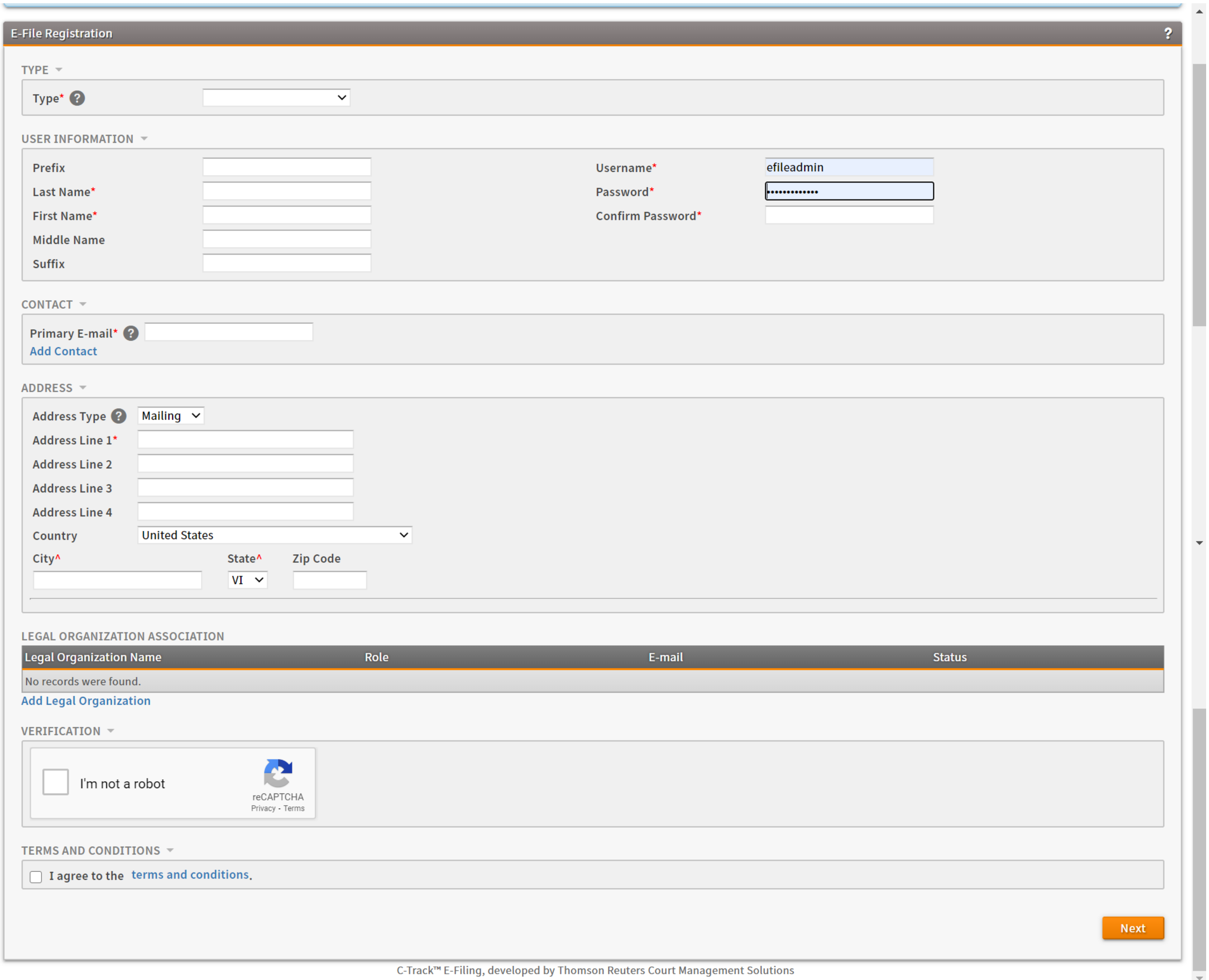

Fig. 1.2: E-File Registration screen

The **E-File Registration** screen has seven containers.

In the **User Information** container:

2. Enter a **User Name**.
3. Enter a **Last Name**.
4. Select a **Role**.
5. Enter a **First Name**.
6. Enter a **Password**.
7. **Confirm Password**.

In the **Contact** container:

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

In the **Address** container:

10. Enter **Address Line 1**.
11. Enter **City**.
12. Select **State**.
13. Enter **Zip Code**.
14. Click **Add Address** to enter additional addresses, as needed.
15. 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.

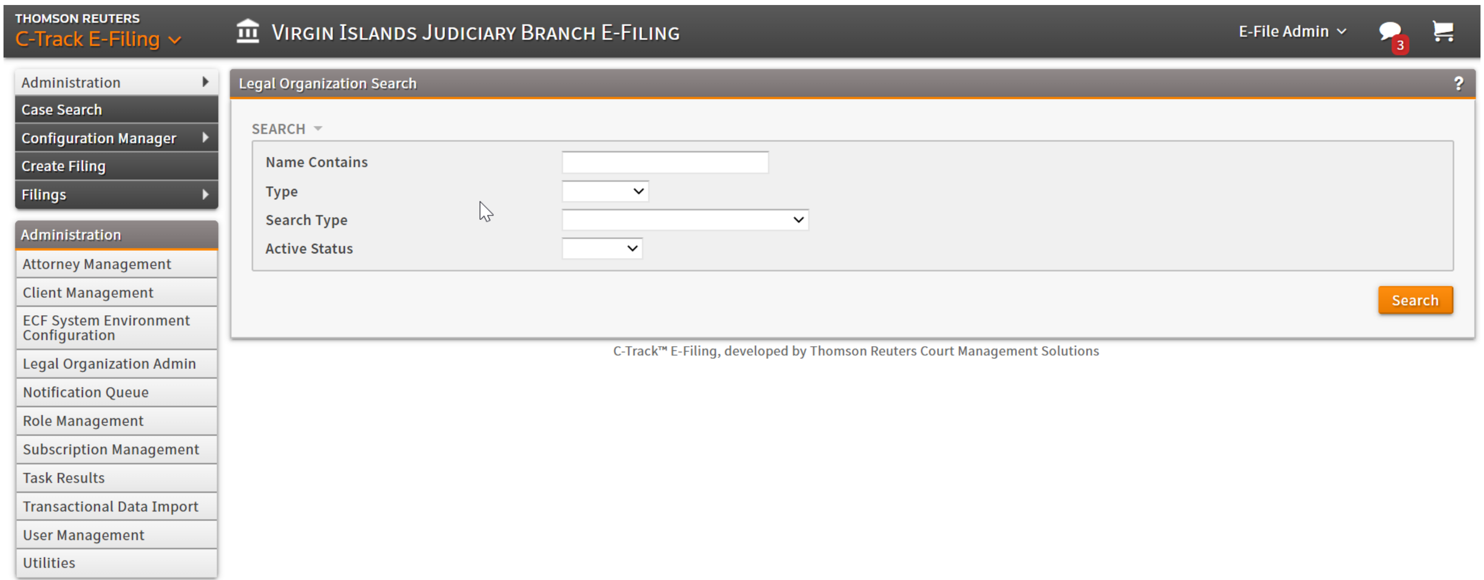

Fig. 1.3: Legal Organization Search window

16. Enter search criteria.
17. Click **Search**.

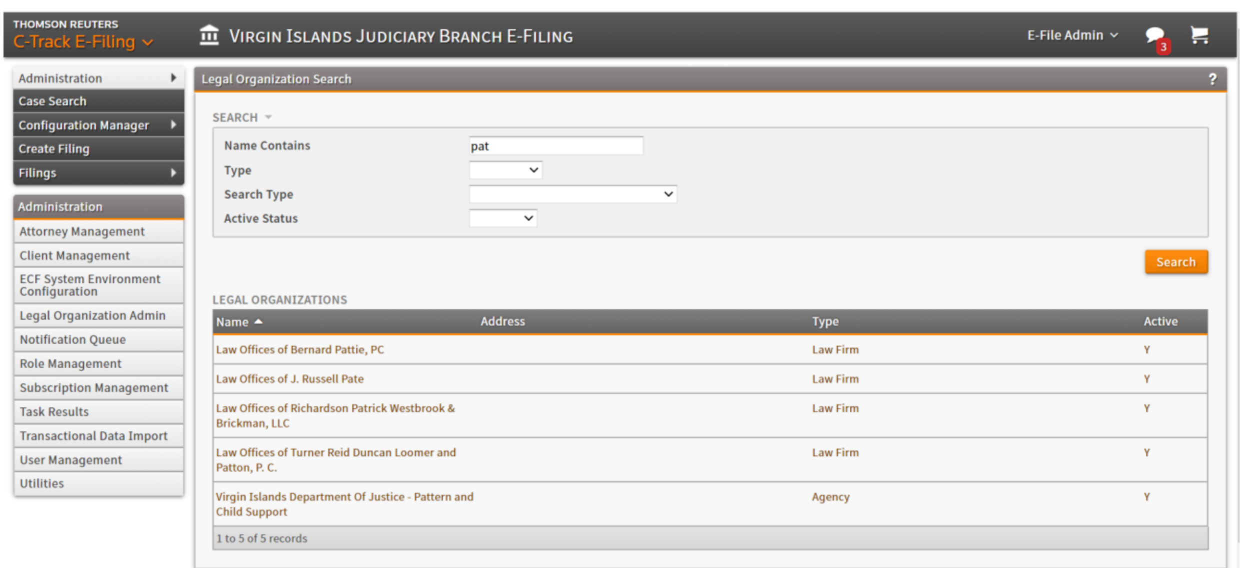

Fig. 1.4: Legal Organization Search window – search results returned

> ➢ **NOTE**: If the Legal Organization to which you belong is not returned in a search, you will be able to add the Organization through the **User Administration** screen, once your E-File account is approved. Please see section 1.2 of this User Guide for more information about the **User Administration** screen.

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

The **Legal Organization Search** window appears.

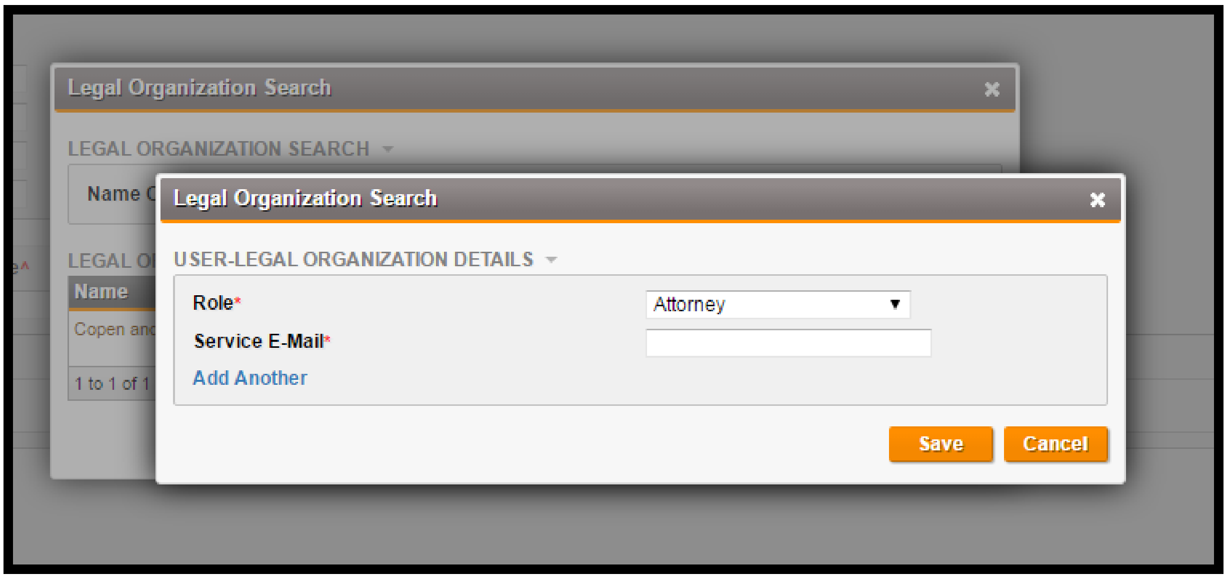

Fig. 1.5: Legal Organization Search window – Organization Details

19. Select a **Role**.
20. Enter a **Service Email**.
21. 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.
22. Click **Save**.

In the **Verification** container:

23. Enter Verification from the Captcha container.

In the **Terms and Conditions** container:

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

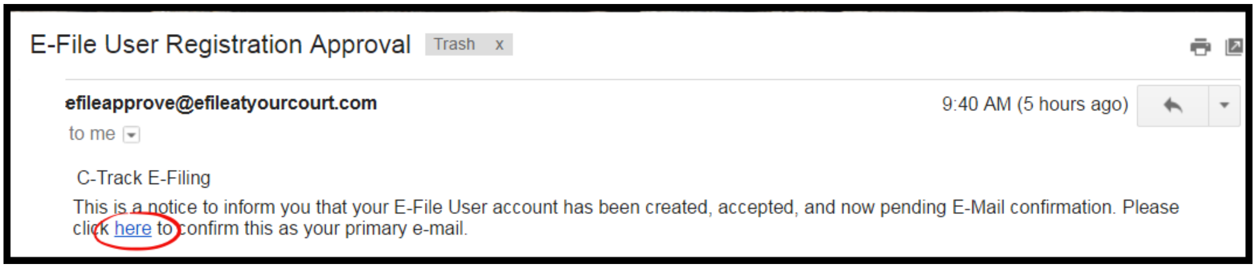

Fig. 1.9: C-Track E-Filing Email example

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

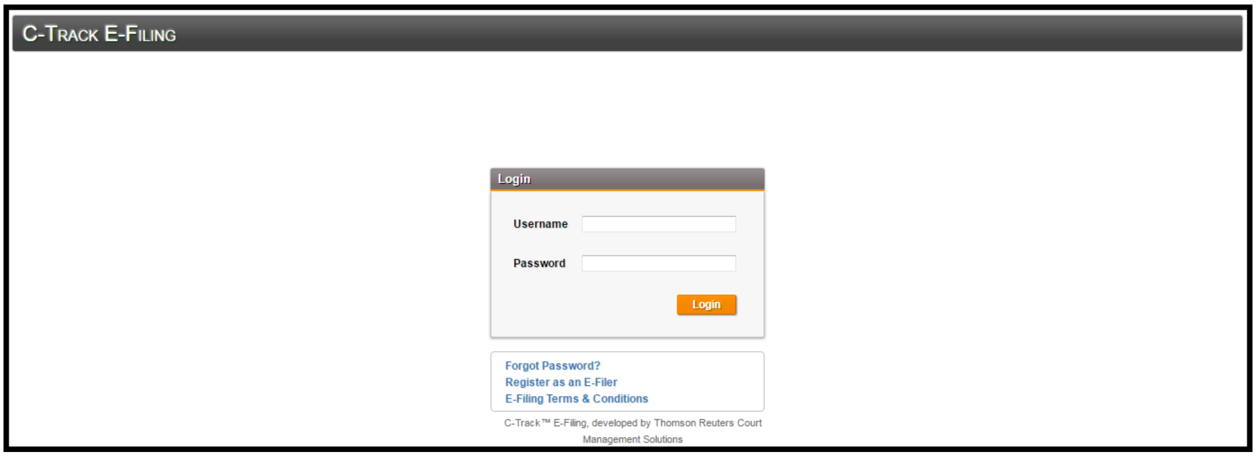

Fig. 1.10: C-Track E-Filing Login screen

29. Enter **Username**.
30. Enter **Password**.
31. Click **Login**.

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

Fig. 1.11: C-Track E-Filing Login screen

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

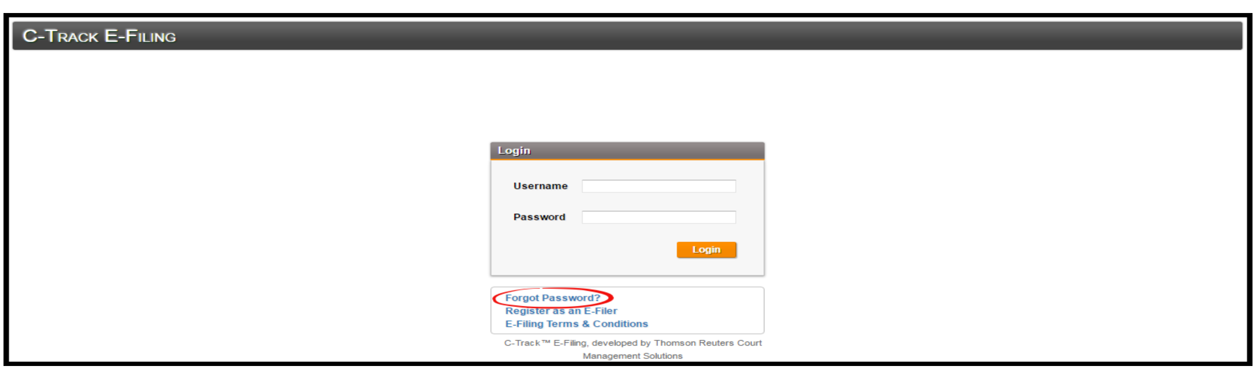

Fig. 1.12: C-Track E-Filing Login screen – **Forgot Password?**

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

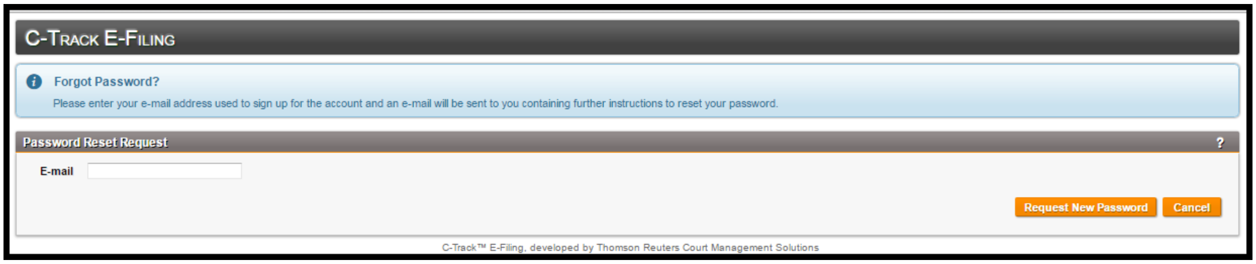

Fig. 1.13: Password Reset Request container

33. Enter the email address you provided on the Registration form.
34. Click **Request New Password**.

An email is sent to the email account on file. Follow the instructions in the email to reset your password.

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 User name in the top right menu bar.

The **User Account** menu appears.

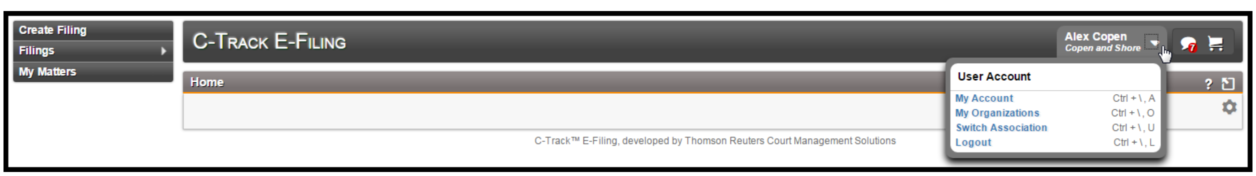

Fig. 1.14: User Account menu exposed

> **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** | **Ctrl + \, O** |
> | **Switch Association** | **Ctrl + \, C** |
> | **Logout** | **Ctrl + \, L** |
>
> Additionally, you can access a shortcuts menu from any screen using the keyboard shortcut **Ctrl + **.

2. Select the **My Account** link.

The **User Administration** screen appears.

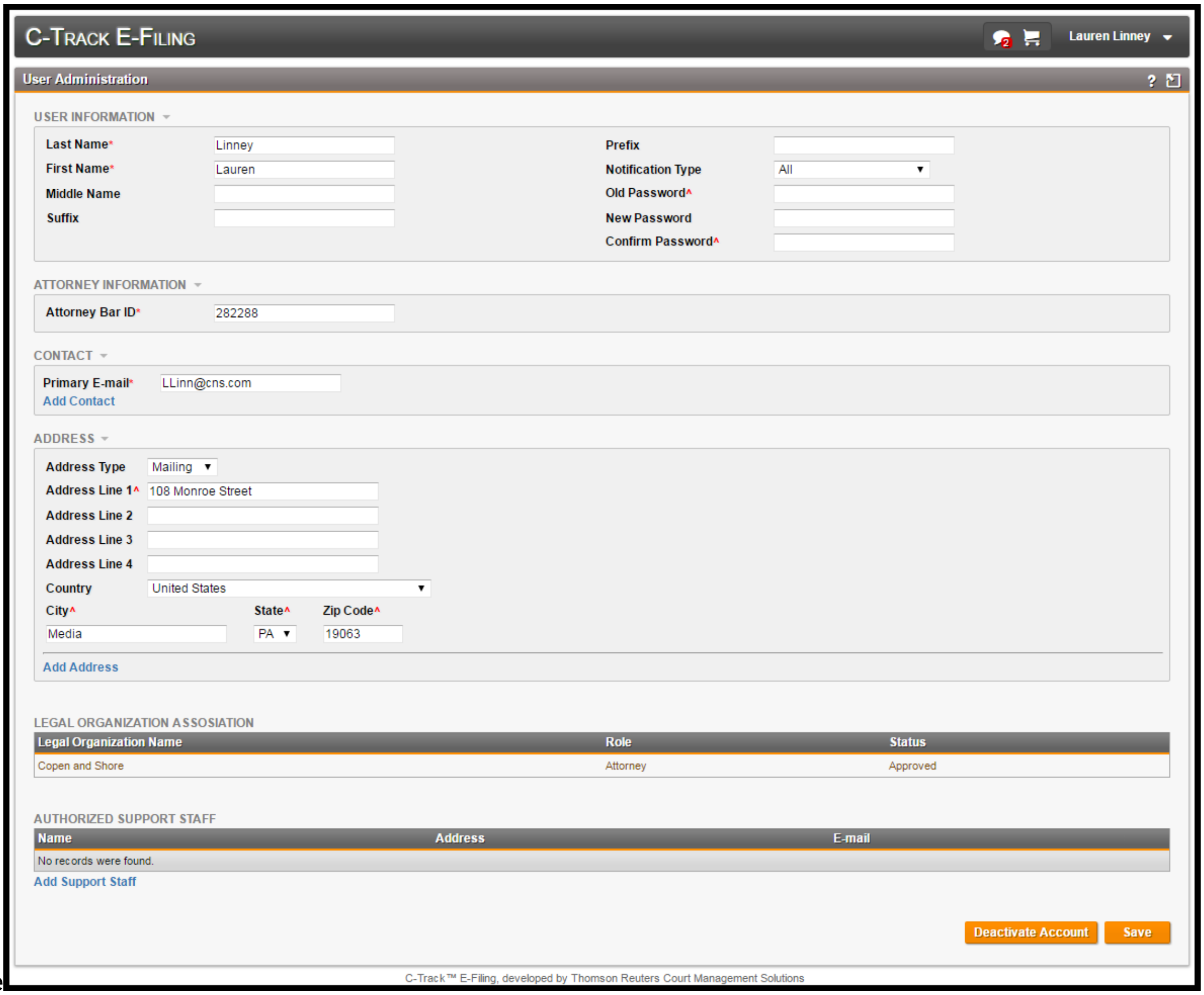

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Fig. 1.15: User Administration screen

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** and **Address** contact information. **Legal Organization Association** information is not editable by you but, is controlled by the authorized Legal Organization Administrator for your Legal Organization.

The **Authorized Support Staff** container lets you add Legal Organization support staff, that are registered C-Track E-Filers.

3. Click the **Add Support Staff** link at the bottom left of the **Authorized Support Staff** container.

The **Add Support Staff** window appears.

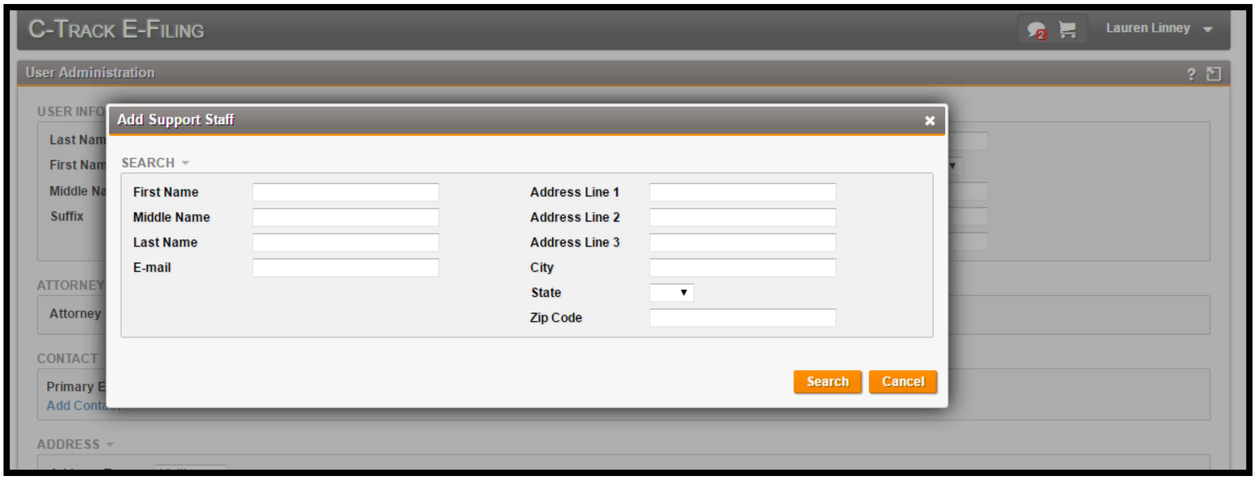


Fig. 1.16: Add Support Staff window

The **Add Support Staff** window has a single **Search** container which lets you search for a Registered E-Filer who supports you in your Legal Organization.

4. Enter search criteria.
5. Click **Search**.

Search results are return in the **Support Staff Results** display table.

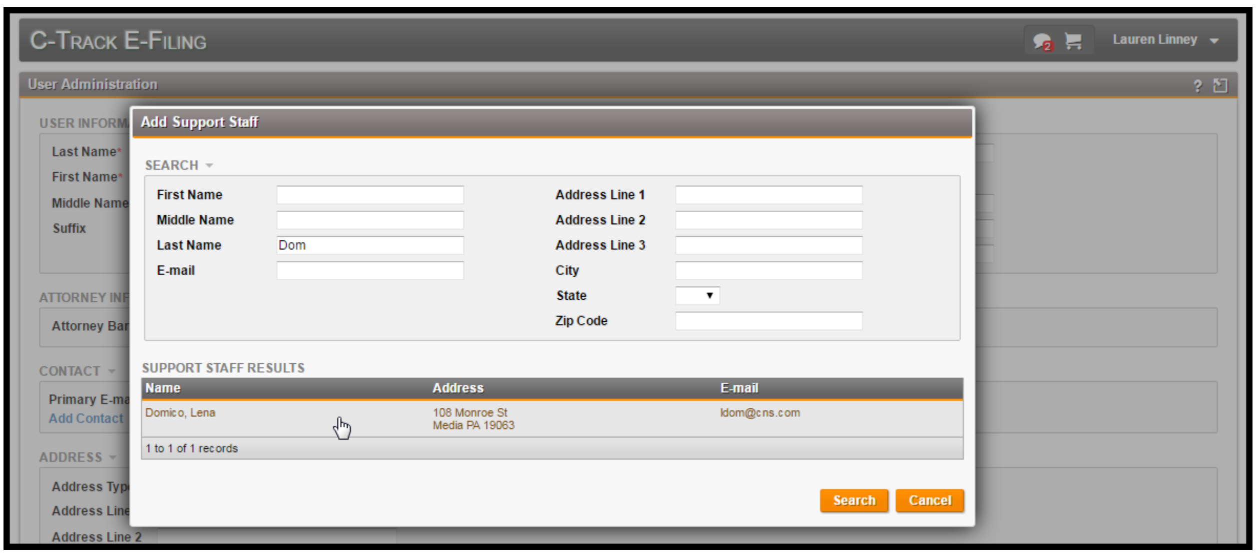


Fig. 1.17: Add Support Staff window – results returned

6. Select the line item for the Support Staff individual you want to add.

The selected individual is added.

7. Click **Save**.

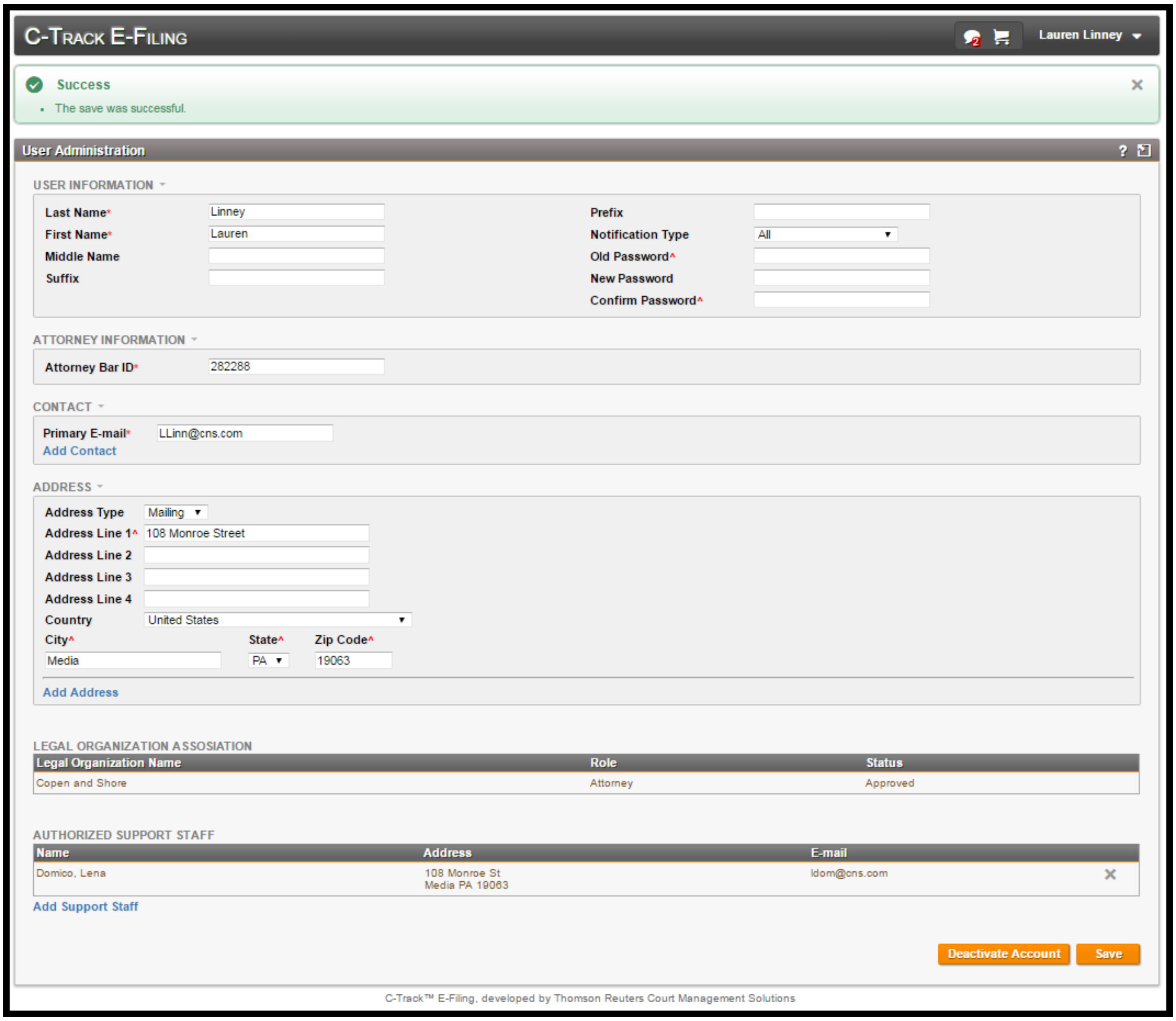


Fig. 1.18: User Administration screen – Authorized Support Staff added – successful save

You have successfully added an authorized Support Staff to your account. The **Green Success Notification** displays in the top content container, above the **User Administration** screen.

Note the screen also provides the ability to Deactivate your Account. When you click the **Deactivate Account** button, the **Confirm** window appears.

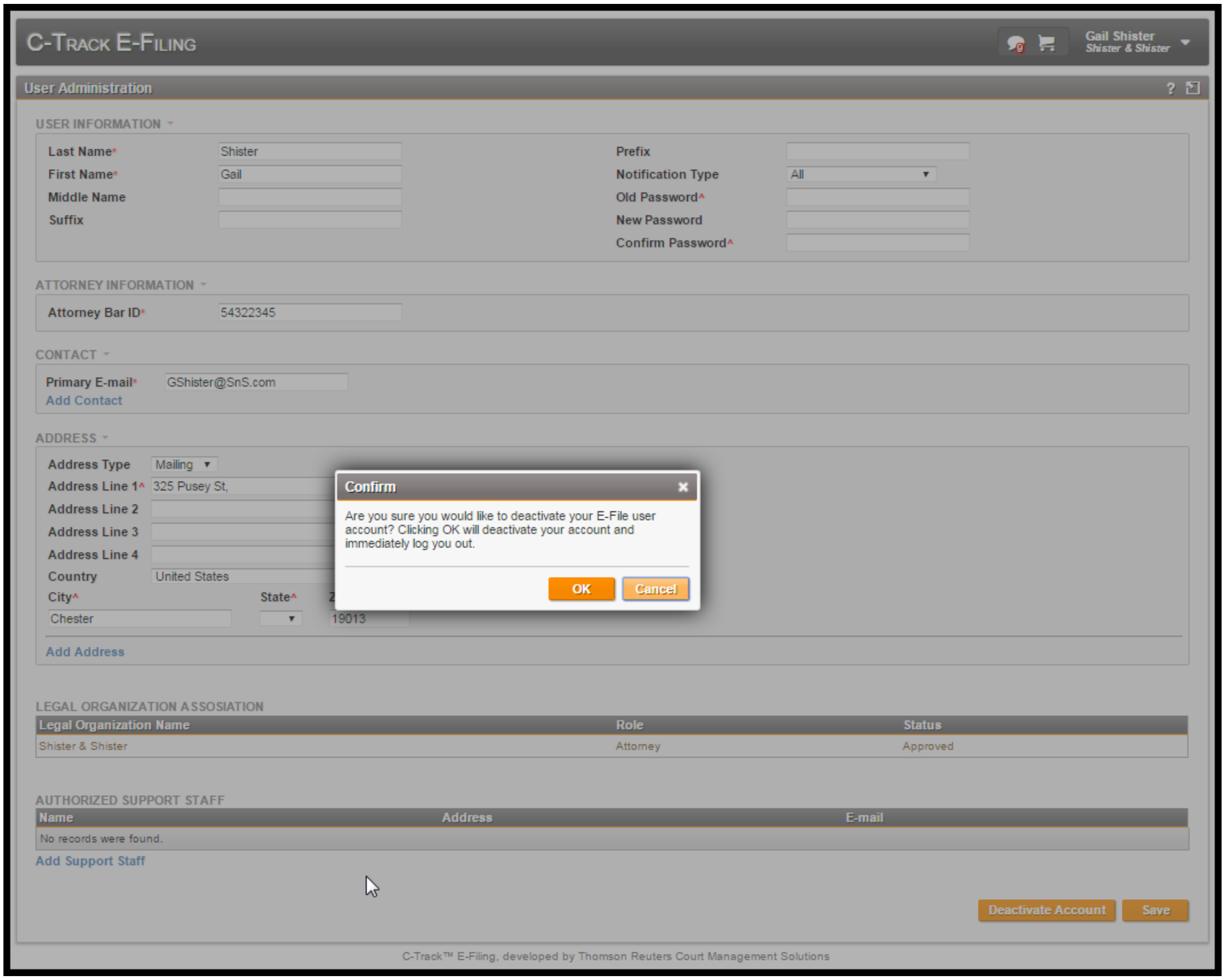


Fig. 1.19: Confirm Deactivate window

If you choose to deactivate your account, it becomes Inactive. The Court Administrator for the Court in which you E-File must be contacted to reactivate your account.

1.3 Navigation, Dashboard Widgets and Switch User Association

In this section we review navigation and Home page 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.

Fig. 1.20: 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  at the far right of the screen.

The **Edit Dashboard** window appears.

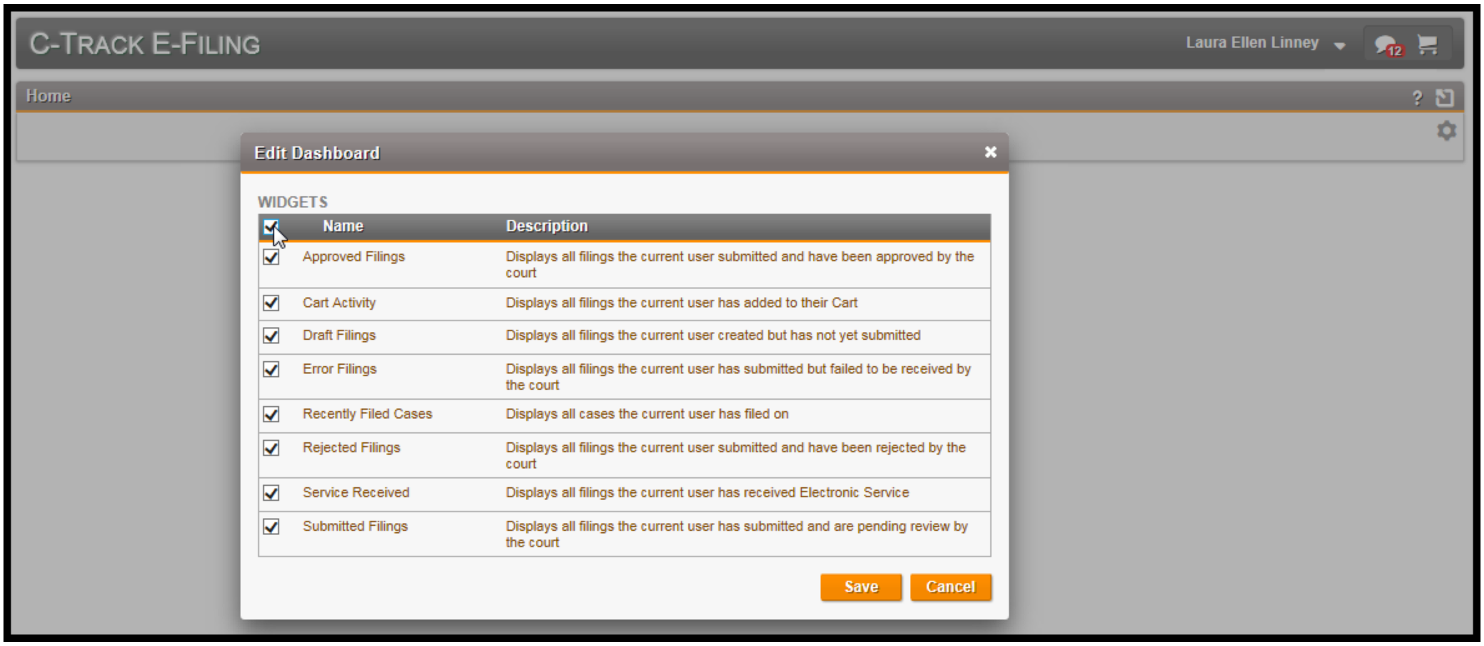


Fig. 1.21: Edit Dashboard window

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.

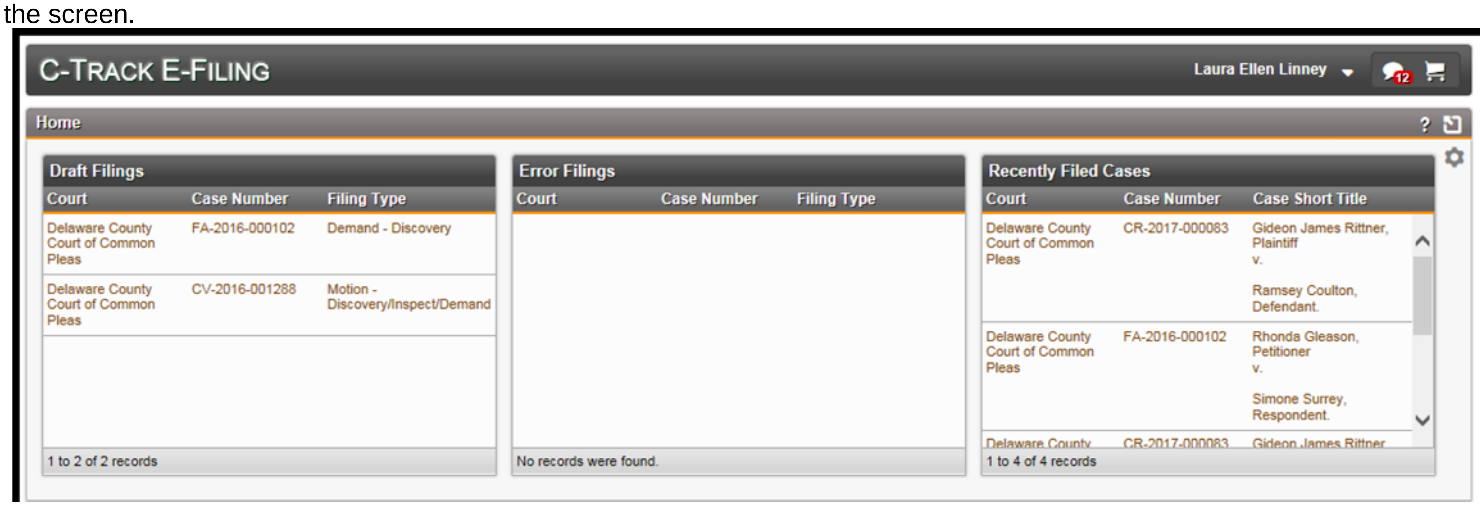


Fig. 1.22: Home screen – All Widgets added –

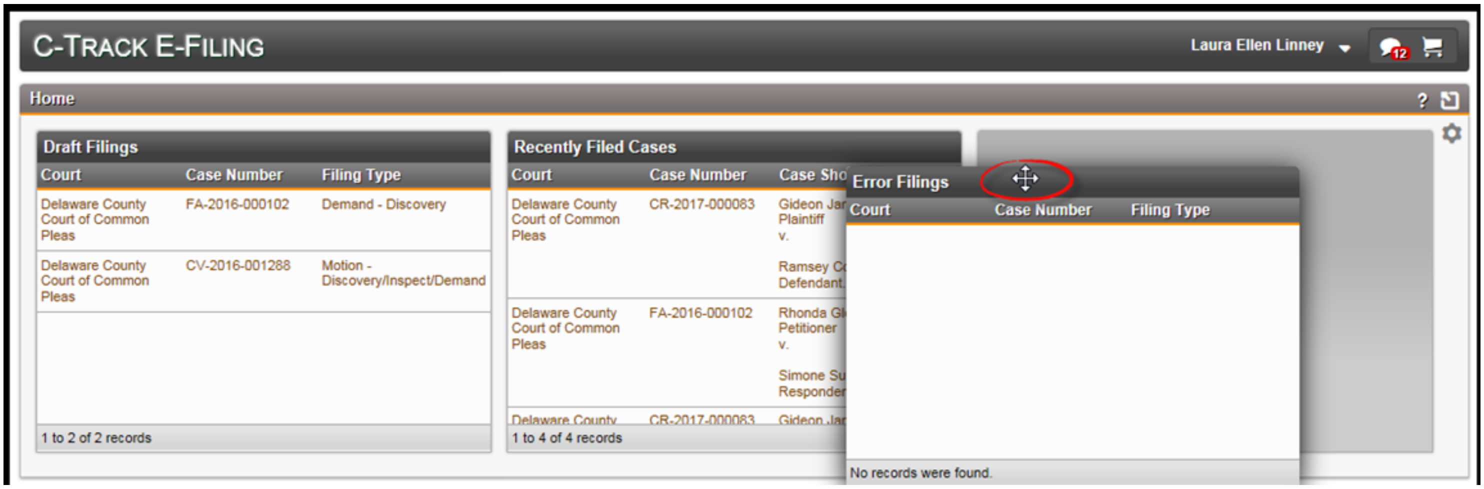


Fig. 1.23: **Home** screen – drag and drop Widget placement

For users who are members of a Legal Organization, selected **Home** screen. Widgets belong to the account to 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.

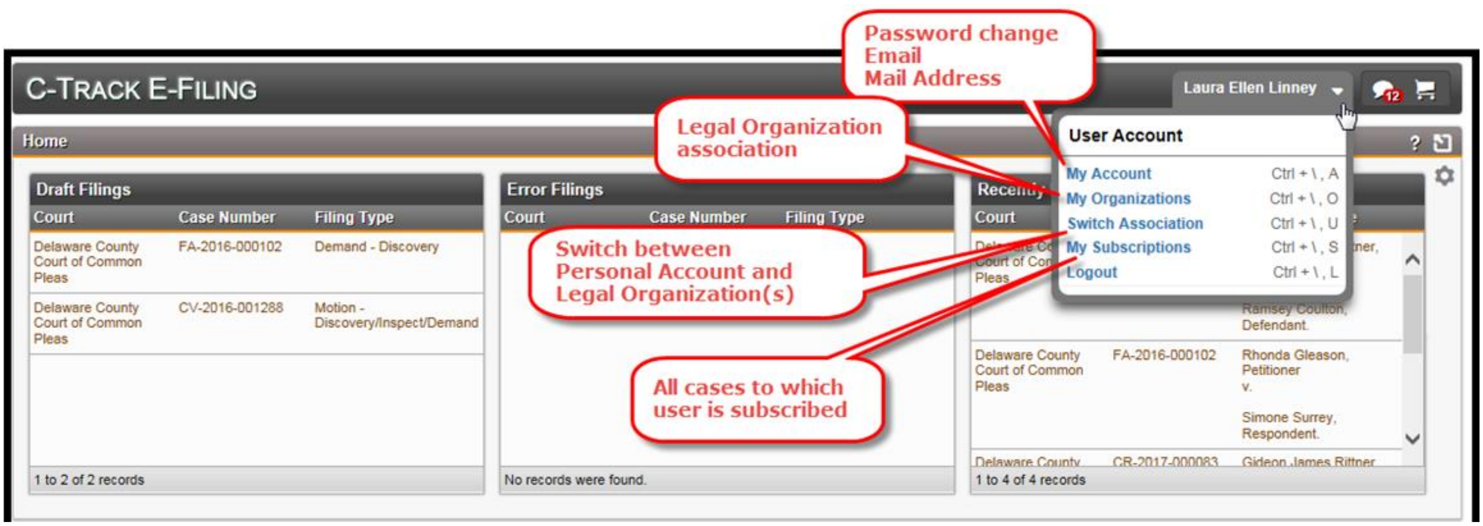


Fig. 1.24: **User Account** menu

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

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

The **Select Association** window appears.

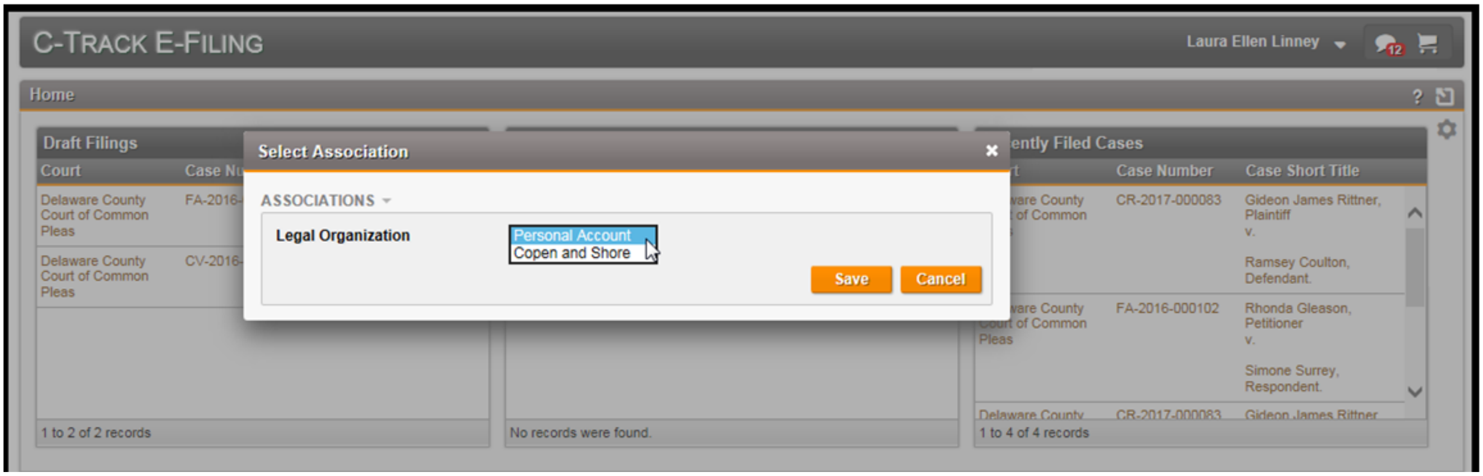


Fig. 1.25: Select Association window

7. Select the Legal Organization.
8. Click **Save**.

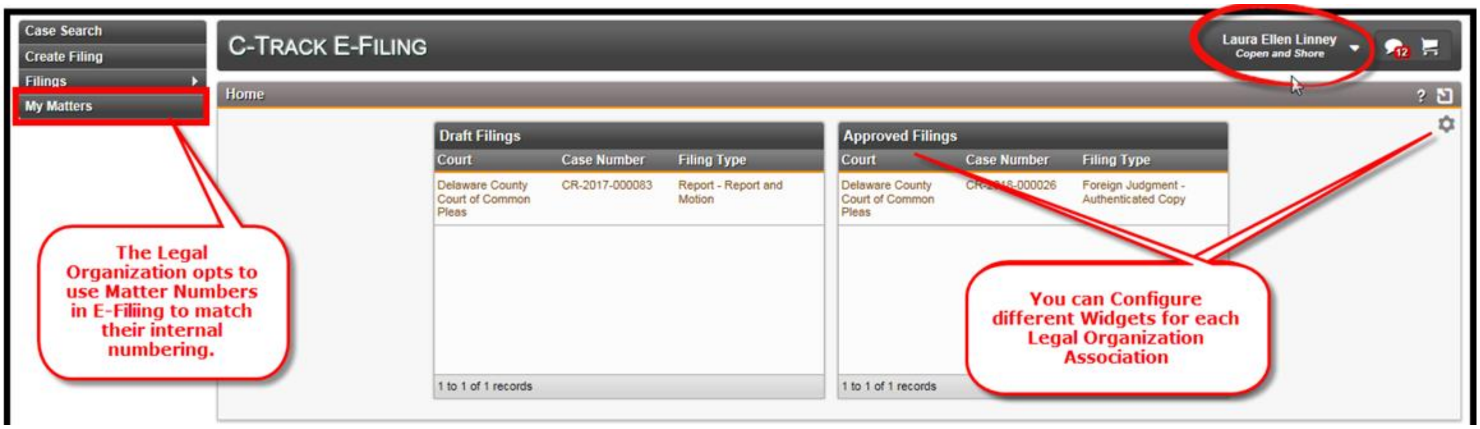


Fig. 1.26: E-File User Legal Organization Home screen

Note the addition of **My Matters** in the left navigation menu, the appearance of the Legal Organization name below the authorized Users name and no Widgets appear because the user has not 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.

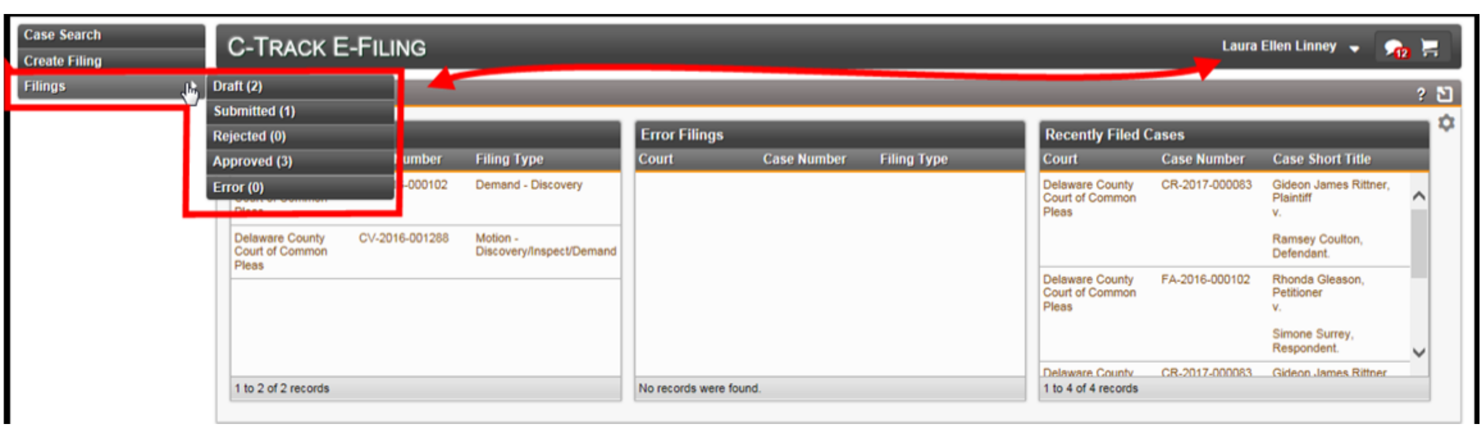


Fig. 1.27: E-File User Home screen

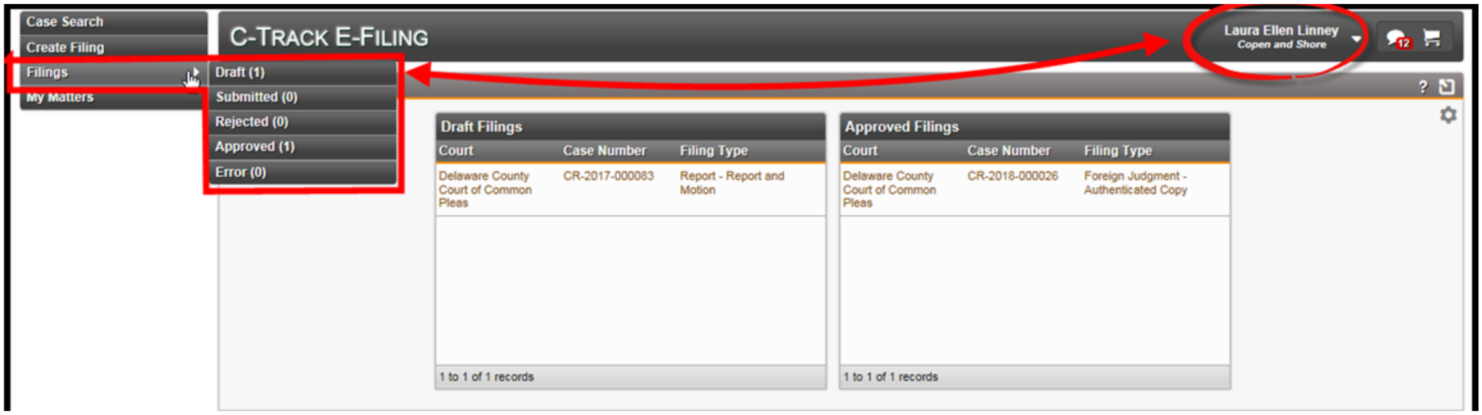


Fig. 1.28: E-File User Legal Organization Home screen

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.

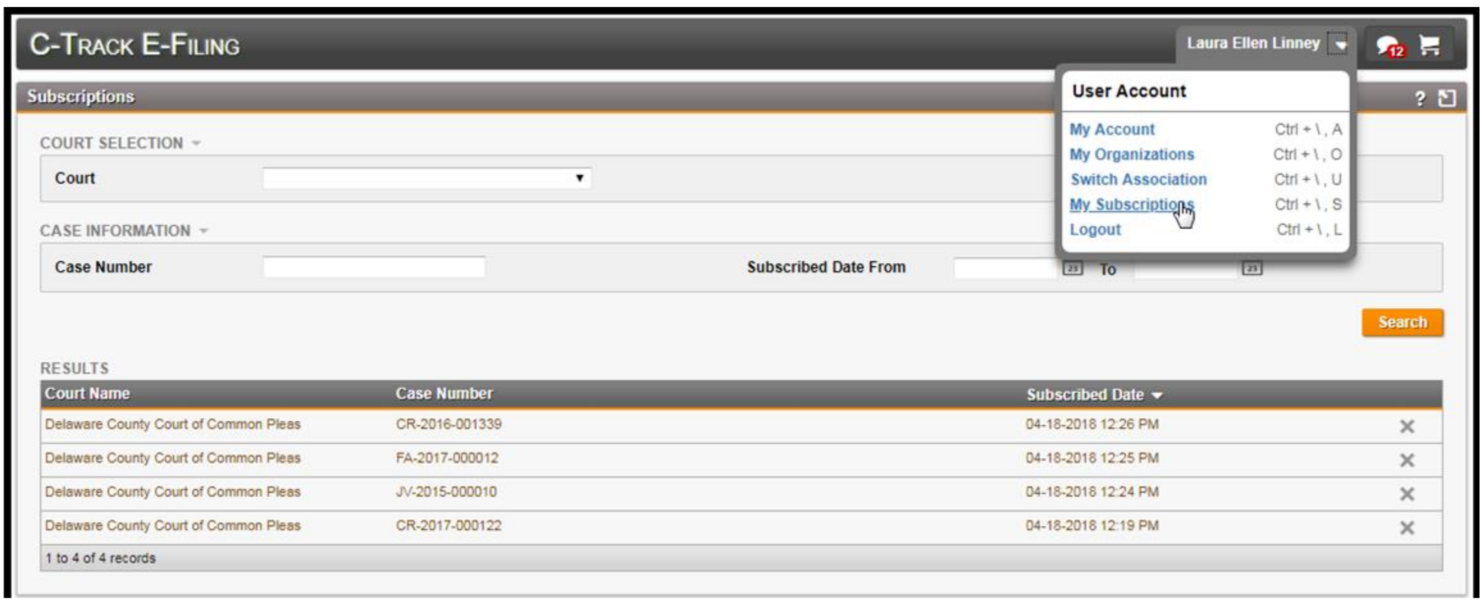


Fig. 1.29: My Subscriptions as E-File User not associated to Legal Organization

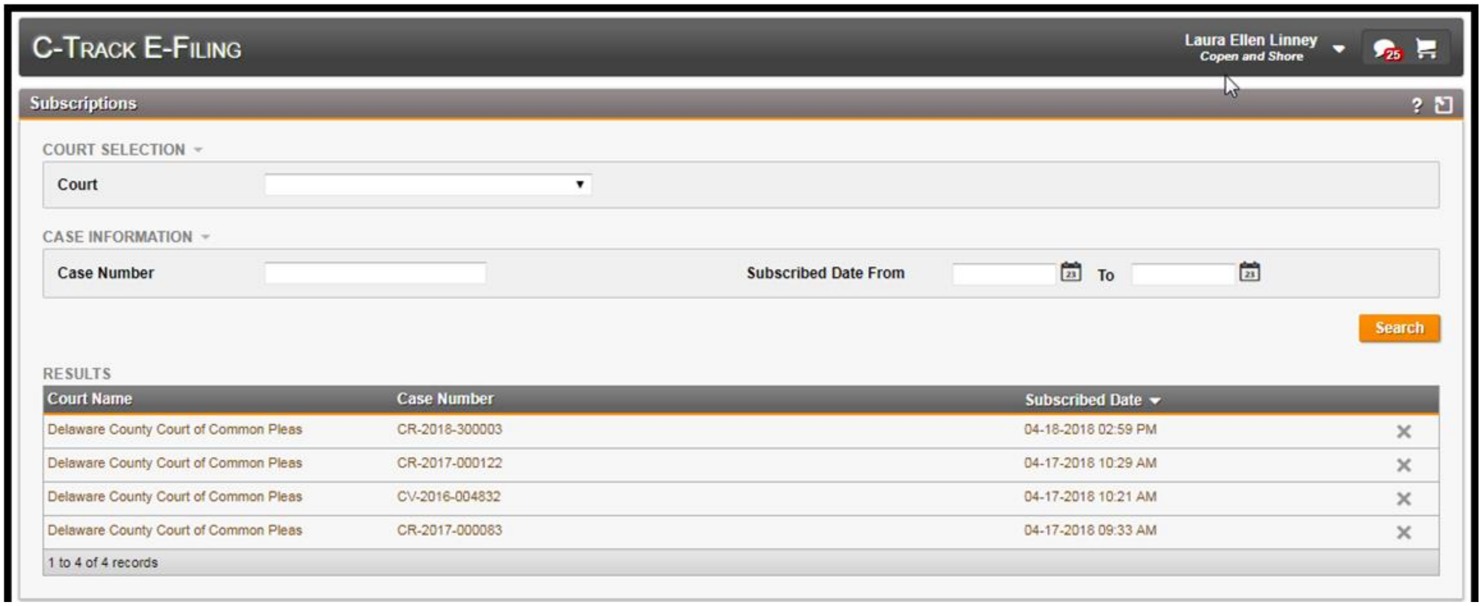


Fig. 1.30: My Subscriptions as E-File User associated to Legal Organization

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 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. 1.31: 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.

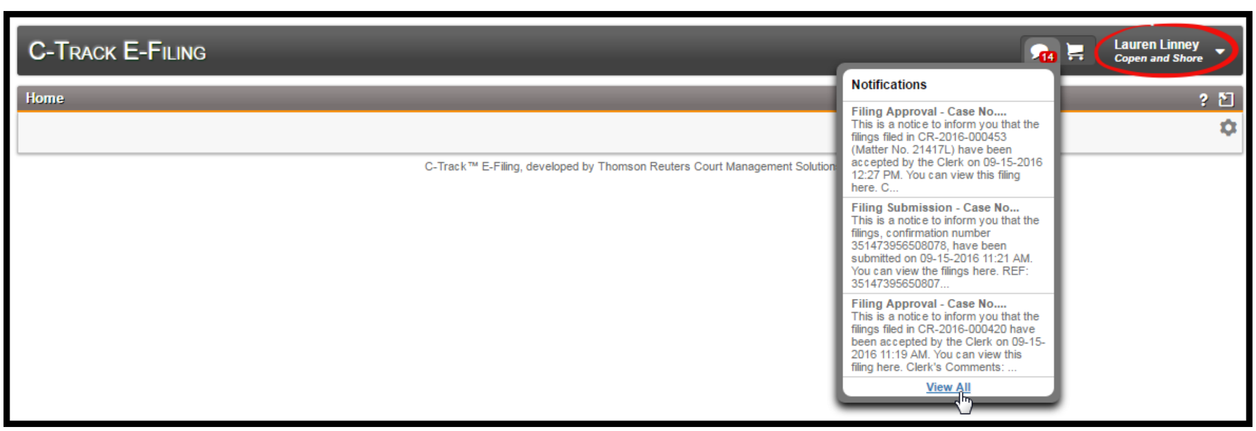


Fig. 1.32: Home screen – Notifications from Legal Organization account for the same user - **Notifications** exposed

2. Click **View All**.

The **Notifications** screen appears.

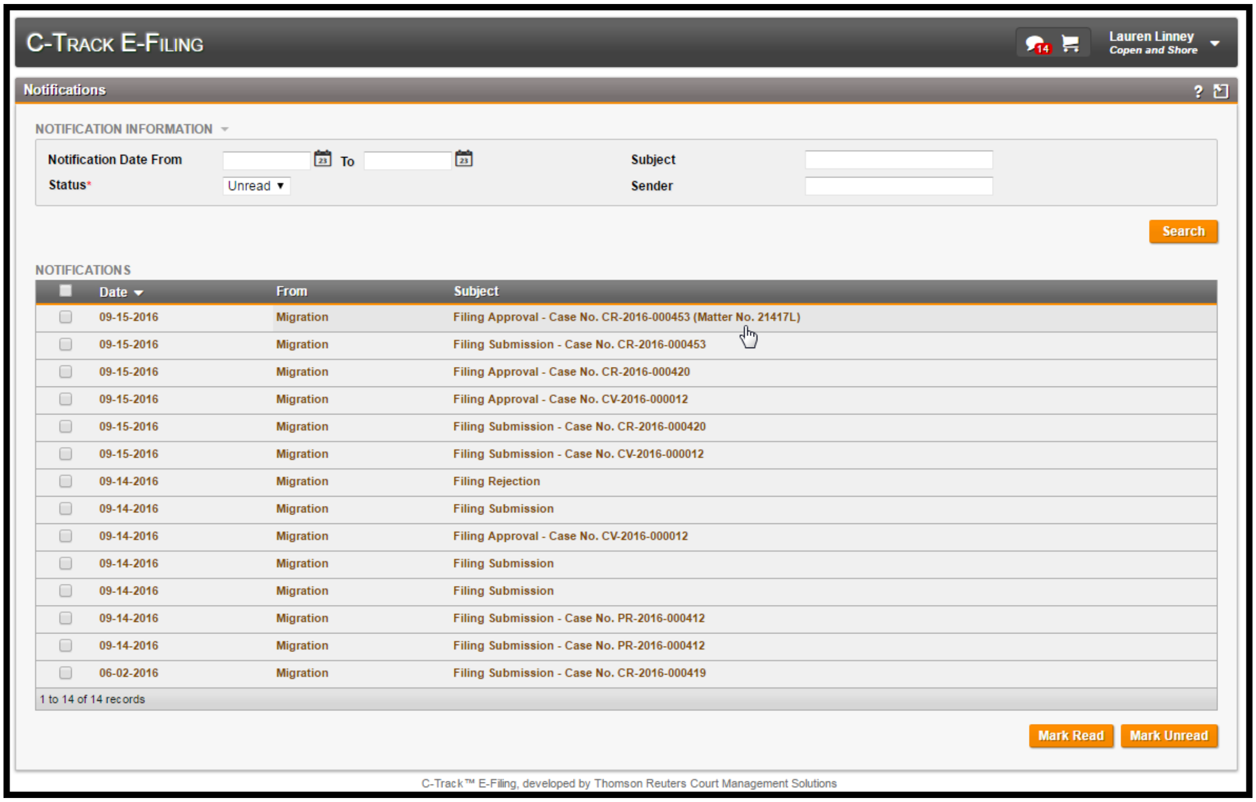


Fig. 1.33: Notifications screen

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

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.

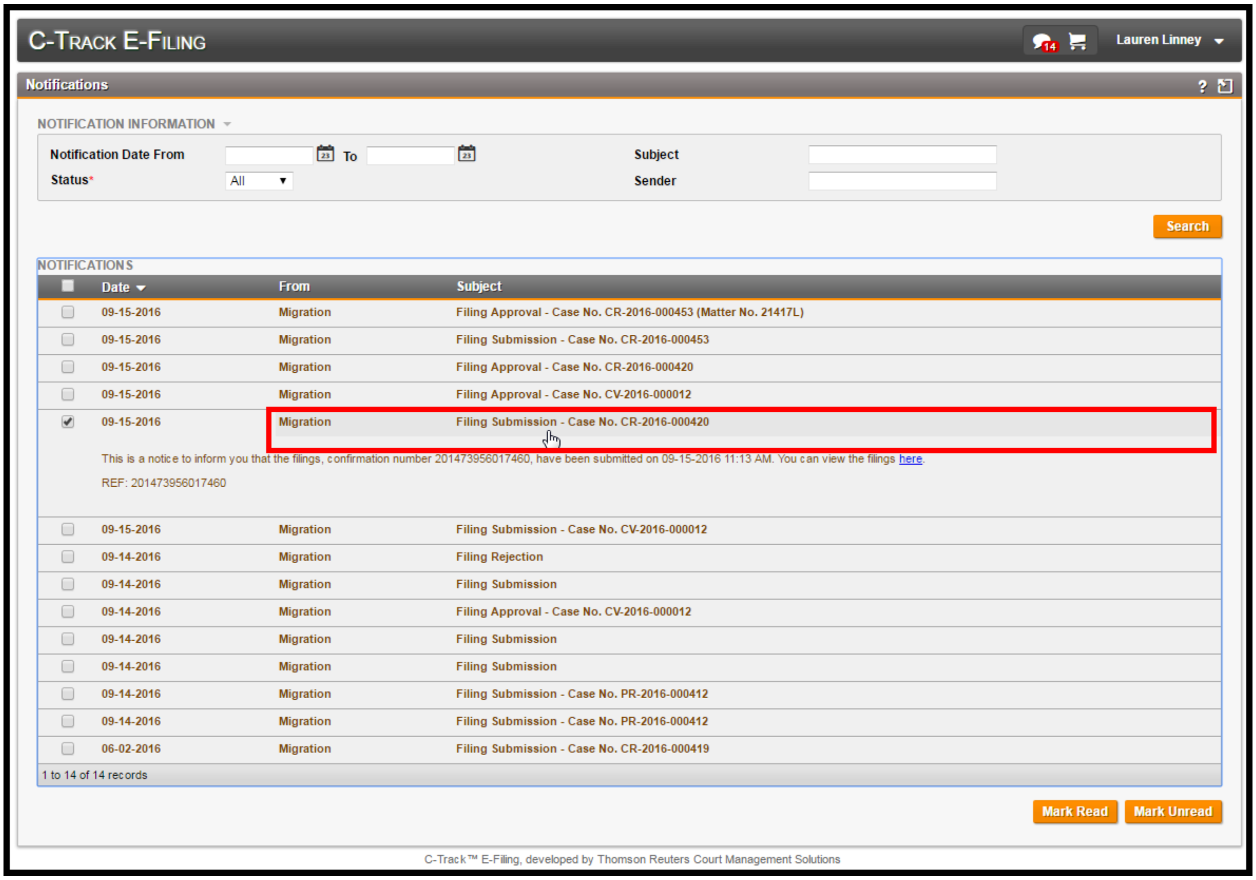


Fig. 1.34: Notifications message expanded

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.

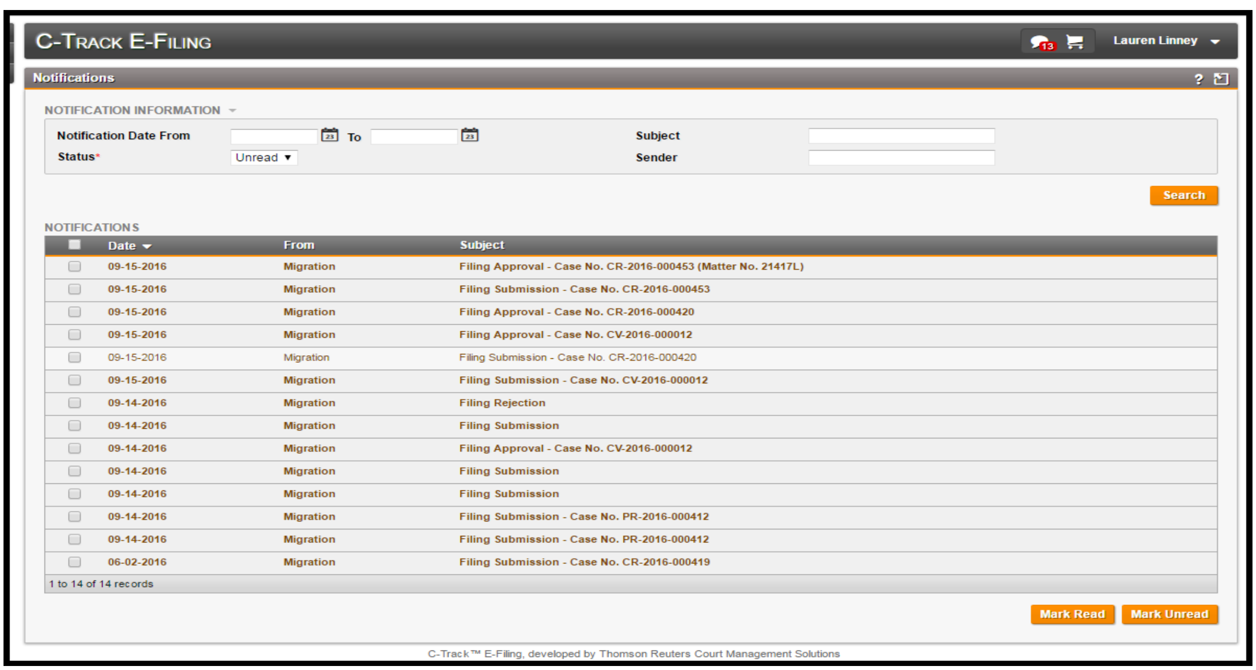


Fig. 1.35: Notifications message read

5. Click the header Check Box to select all line items.
6. Deselect line items to retain an Unread status. Here, we have deselected the Filing Rejected and the single filing that references a Matter number.
7. Click **Mark Read**.

The Read items are removed from the **Notifications** display table.

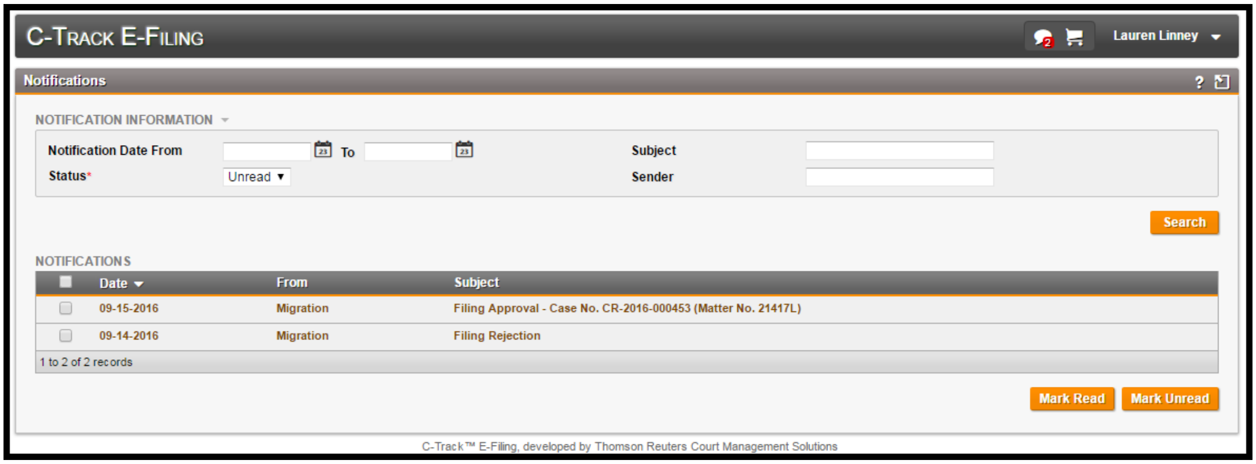


Fig. 1.36: Notifications screen – Unread Notifications default

The default status of the **Notifications** screen is Unread, two message that have Unread status display in the **Notifications** table. Also, the **Notifications** icon now reflects the new number of unread message.

To find Notifications that have been marked Read, use the All or the Read Status as search criteria.

1.5 Add Support Staff

When you associate another member of your Legal Organization to your E-File Account, and make them an Authorized E-Filer, you allow them access to all filings available through your Filings menu, including filings in Draft status. Support staff do not need to have Matters shared with them to access filings when they use the **Switch Association** functionality to establish the association. Essentially, Support Staff associated to you through the Legal Organization gives them security permission to initiate and complete filings on your behalf.

In the example, a member of a Legal Organization associates Support Staff to their E-File account.

1. Select the down chevron to the right of your User name in the top banner navigation.

The **User Account** options appear.

Fig. 1.37: User Account options exposed

> ➢ **NOTE**: In addition to clicking the link in the **User Account** menu, the **Select Authoring E-File User** window can be accessed through the keyboard shortcut:
>
> **Switch Association** **Ctrl + \ , C**

2. Select the **Switch Association** link.

The **Select Authoring E-File User** window appears.

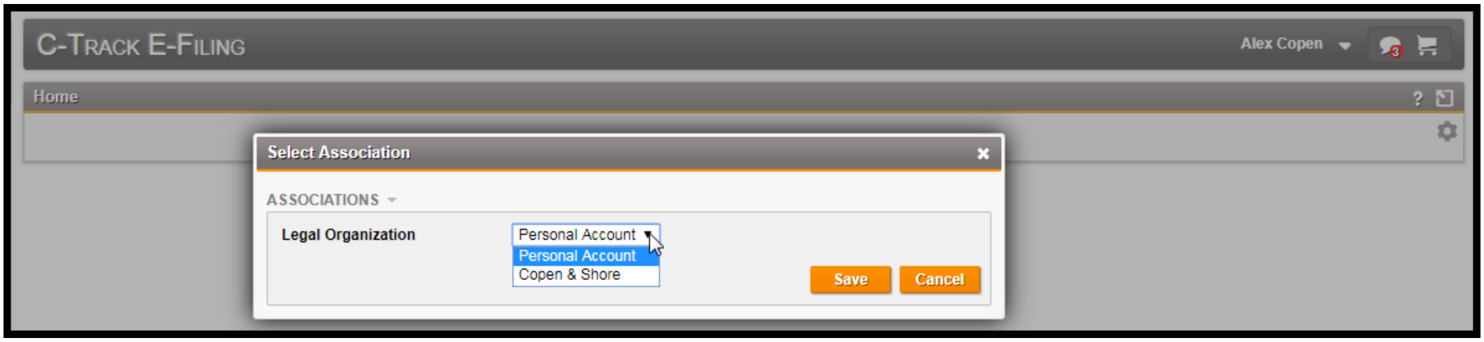


Fig. 1.38: Select Authoring E-File User window

3. From the **Legal Organization** drop down, select your organization.
4. Click **Save**.

You return to the screen from which you selected to switch association. Your Legal Organization appears below your user log in in the upper right top banner.

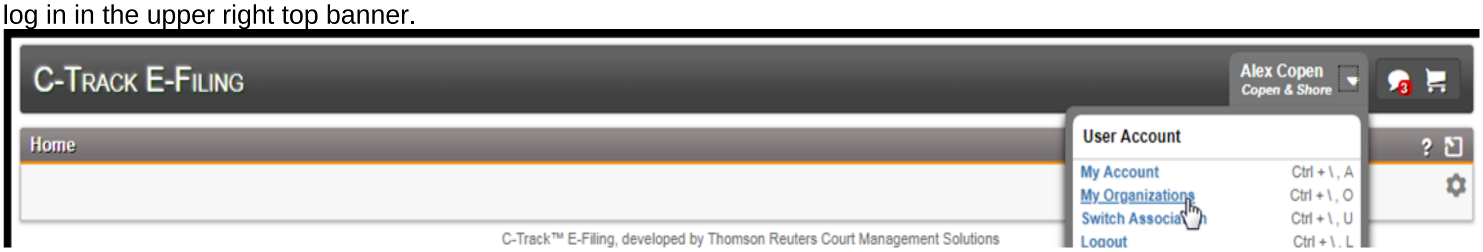


Fig. 1.39: User with Legal Organization

5. Select the down chevron to the right of your User name in the top banner navigation.

The **User Account** options appear.

6. Select the **My Organizations** option.

The **Manage Associated Legal Organizations** screen appears.

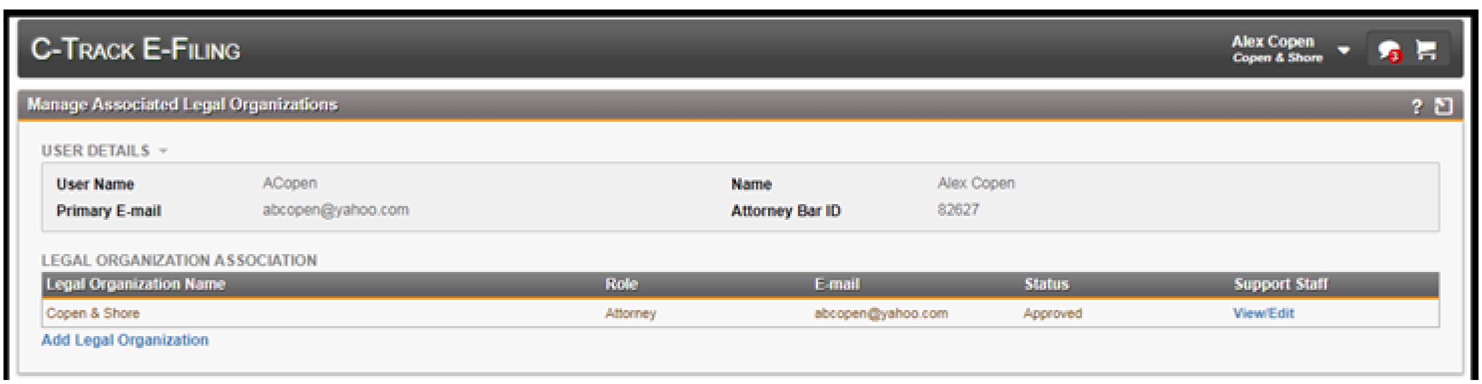


Fig. 1.40: Manage Associated Legal Organizations screen

The **Manage Associated Legal Organizations** screen User Details container shows your information. This information is not editable from here.

The **Legal Organization Association** display table lets you maintain and edit relationships between legal organizations and attorneys and support staff of attorneys.

Legal Organization Name column – name of the law firm or agency to which a member is related

Role column –describes the manner of relationship within a legal organization, such as support staff, attorney

Email column – electronic contact information required to submit electronic filings

Status column – indicates the state of the association

Support Staff column – View / Edit link navigates to the Authorized Support Staff window where you can Search and Add Support Staff

7. Click the **View / Edit** link below the **Support Staff** column of the **Legal Organization Association** display table.

The **Authorized Support Staff** window appears.

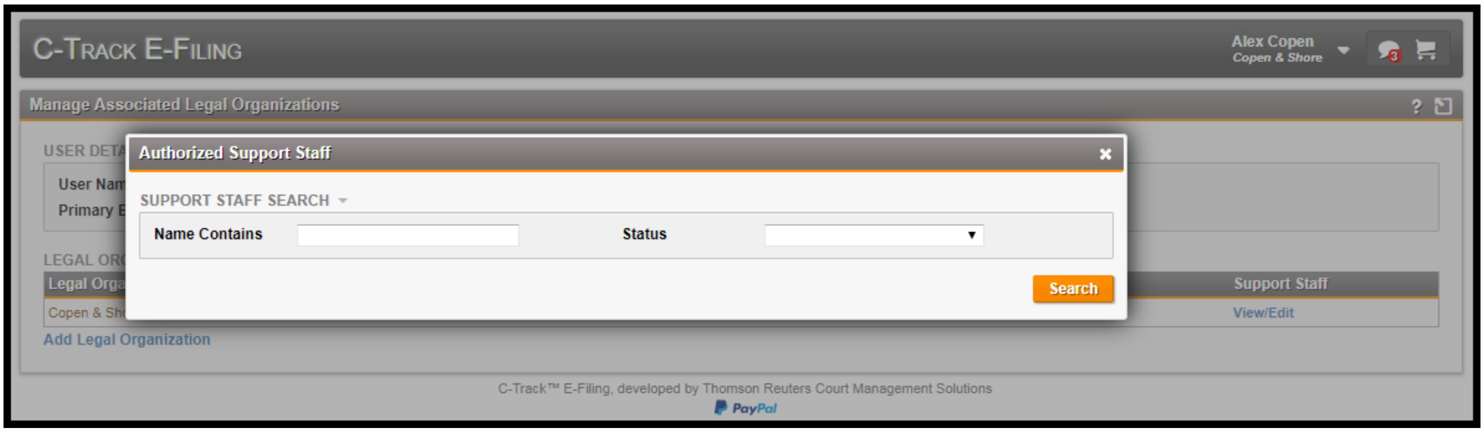


Fig. 1.41: Authorized Support Staff window

The **Authorized Support Staff** window has a single container, **Search**. Because any staff you associate to your account must be authorized E-Filers, use the Search function to find their record.

8. Click **Search**.

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

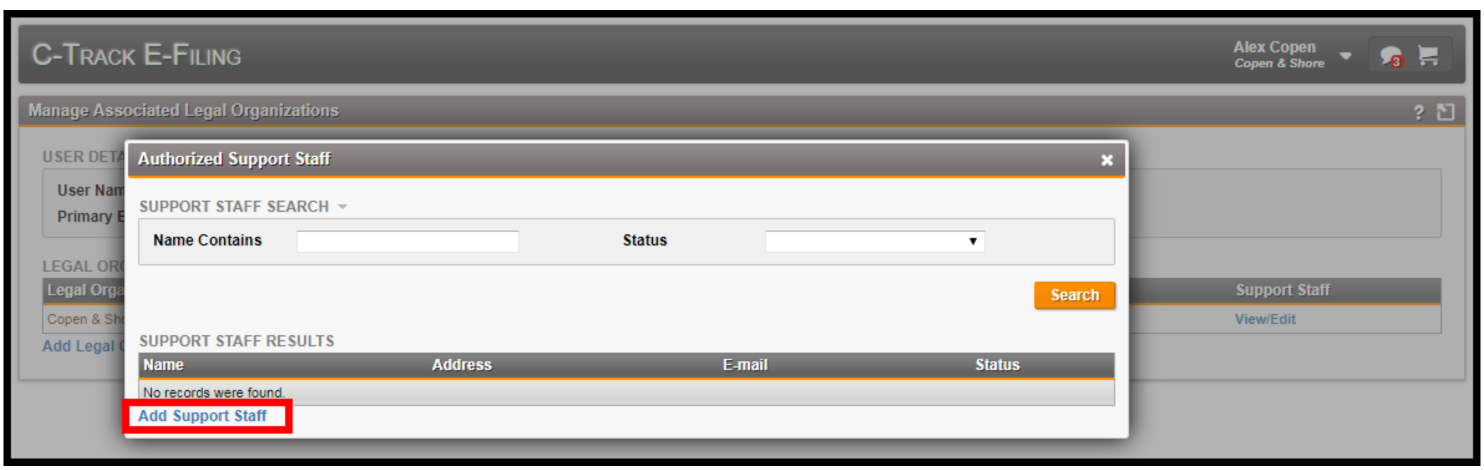


Fig. 1.42: Support Staff Results display table - **Add Support Staff** link

9. Click the **Add Support Staff** link.

The **Add Support Staff** window appears.

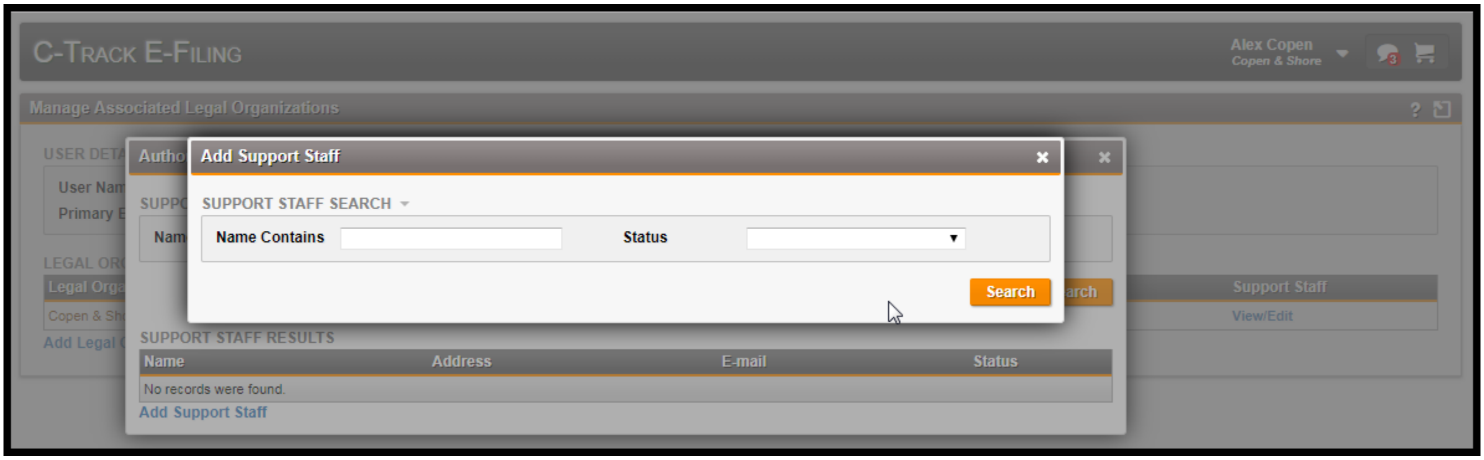


Fig. 1.43 Add Support Staff window

10. Click **Search**.

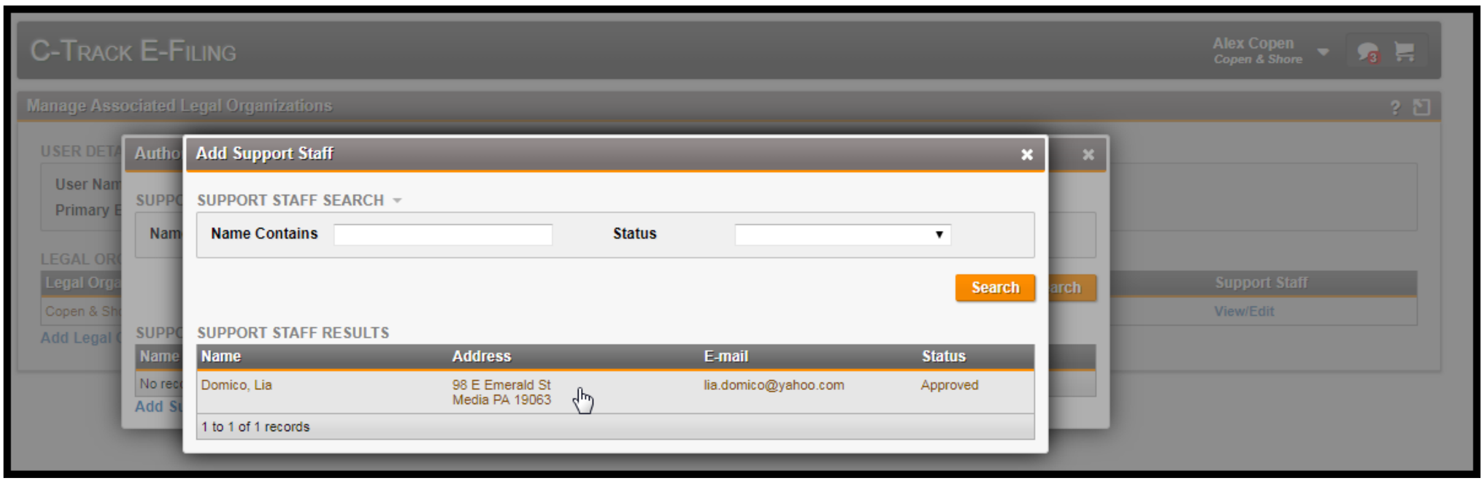


Fig. 1.44: Add Support Staff results

11. Select the line item for the staff member you want to associate to your User Account.

You return to the **Authorized Support Staff** window. The staff members' information appears in the **Support Staff Results** display table.

12. Click **X** to return to the **Manage Associated Legal Organization** screen.

1.6 Matter Numbers and Matter Sharing

As we have seen in the previous section, the Legal Organization has an impact on filings that appear in the users Filings menu queues. Matter Numbers entered on new case or existing case filings, when a user files while associated to their Legal Organization, lets them share the Matter Number, and filings related to that Matter number with other users in the same Legal Organization. When a Matter is Shared, it gives viewing permission to other authorized E-Filers in your Legal Organization.

In this section we add a Matter Number to a case and share a Matter with a Colleague in the same Legal Organization.

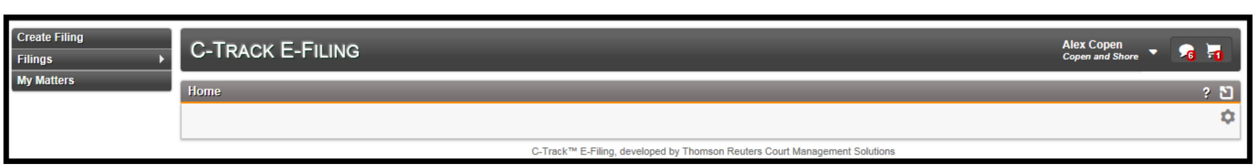


Fig. 1.45: Home screen – **User associated to Legal Organization**

Note from the **Home** screen you see the user is associated to a Legal Organization.

1. Click **My Matters** from the left navigation menu

The **My Matters** screen appears.

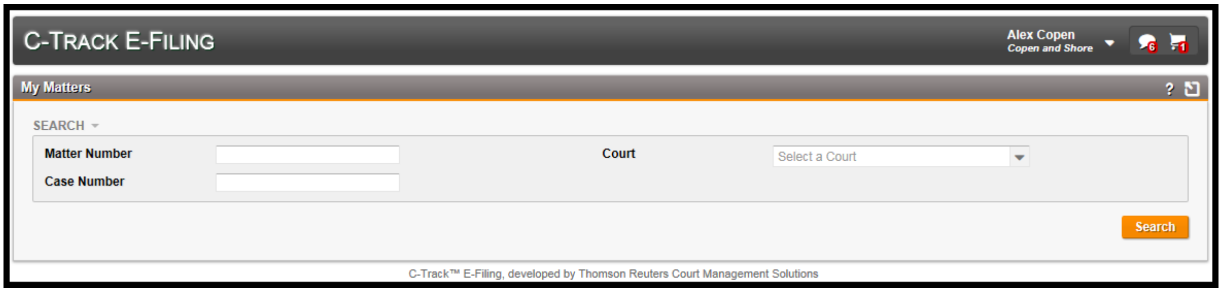


Fig. 1.46: My Matters screen

The **My Matters** screen has a single **Search** container where you can specify a Matter Number, Case Number and Court upon which to search. No criteria is required to perform a search for Matter Numbers that are associated to you.

2. Click **Search**.

All Results appear in the **Results** display table.

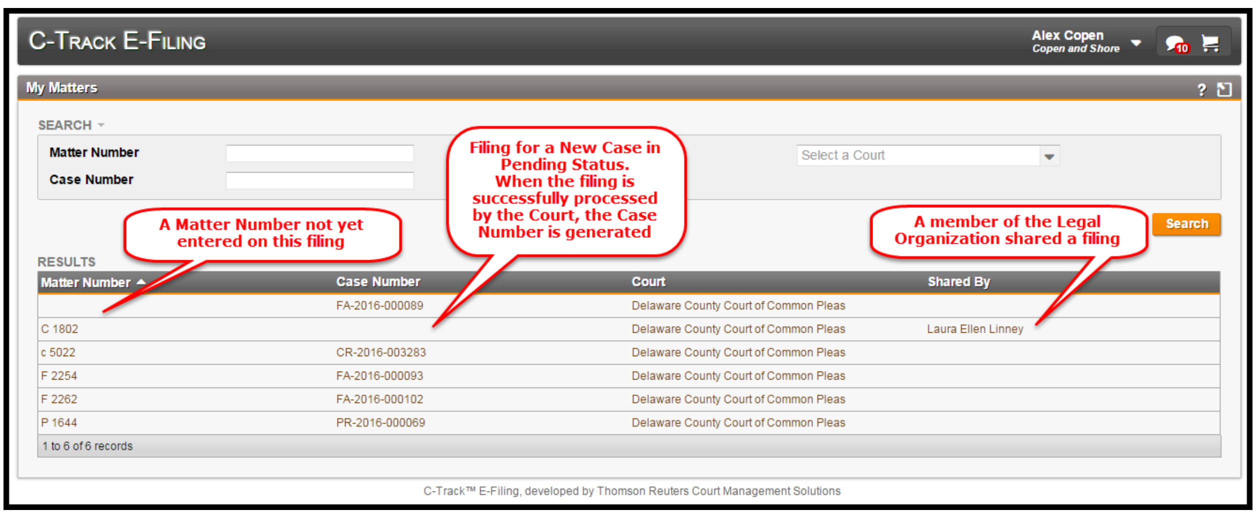


Fig. 1.47: My Matters screen - Search results displayed

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

Matter Number column – shows the internal case number of the Legal Organization. The Matter Number can be selected to navigate to the **Matter View** screen where you can edit the number and share the matter with other colleagues in your Legal Organization.

Case Number column –provides the C-Track Case Number, which is auto-generated when the case is created or the filing is approved in the C-Track application. The Case Number can be selected to navigate to the **Case View** screen which provides a summary of the case.

Court column – shows the Court in which the case is proceeding

Shared By column – lists all members of your Legal Organization who are authorized to access the matter

3. Select the Matter line item that displays no **Matter Number**.

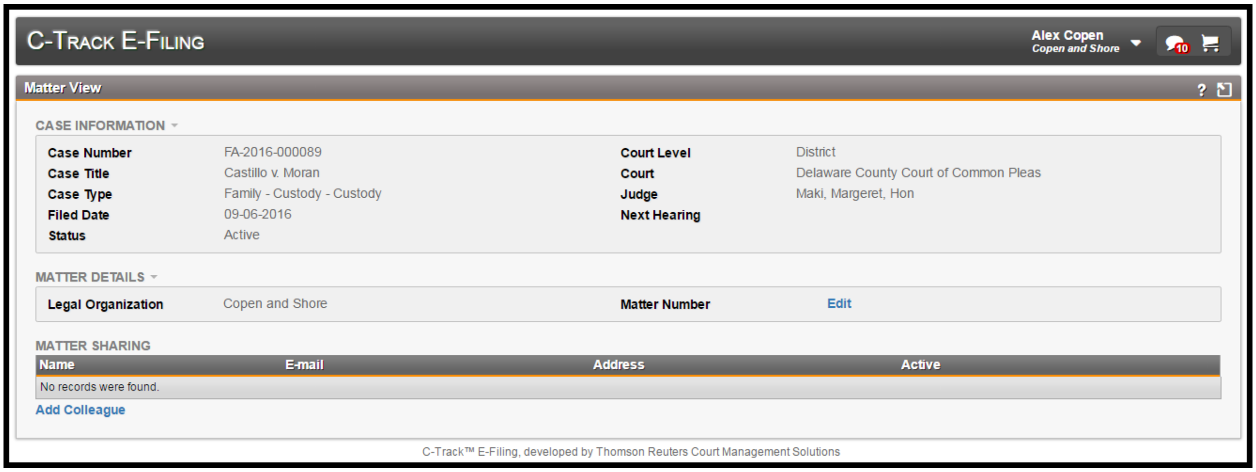


Fig. 1.48: Matter View screen

The **Matter View** screen has three containers. The **Case Information** container provides summary information about the case and is not editable.

The **Matter Details** container shows the **Legal Organization** to which the matter is associated and the **Matter Number**. The **Edit** link lets you edit the Matter Number.

The **Matter Sharing** display table shows the **Name**, **Email** address, mailing or physical **Address** and **Active** status of colleagues with whom you have shared a Matter. The **Add Colleague** link lets you share your Matters with other members of your Legal Organization.

4. Click the **Edit** link in the **Matter Details** container.

The **Edit Matter** window appears.

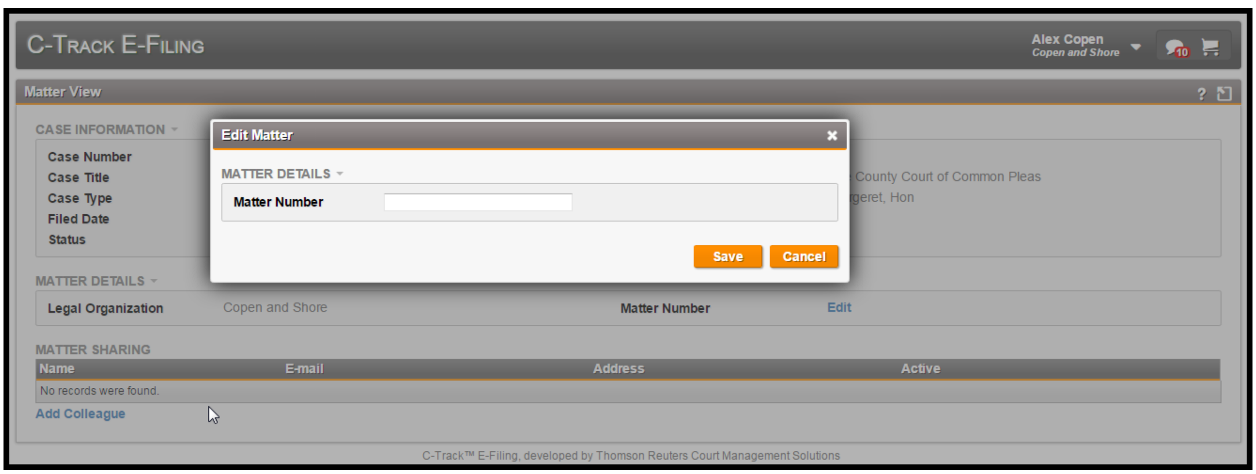


Fig. 1.49: Edit Matter window

5. Enter a **Matter Number**.
6. Click **Save**.

You return to the **Matter View** screen.

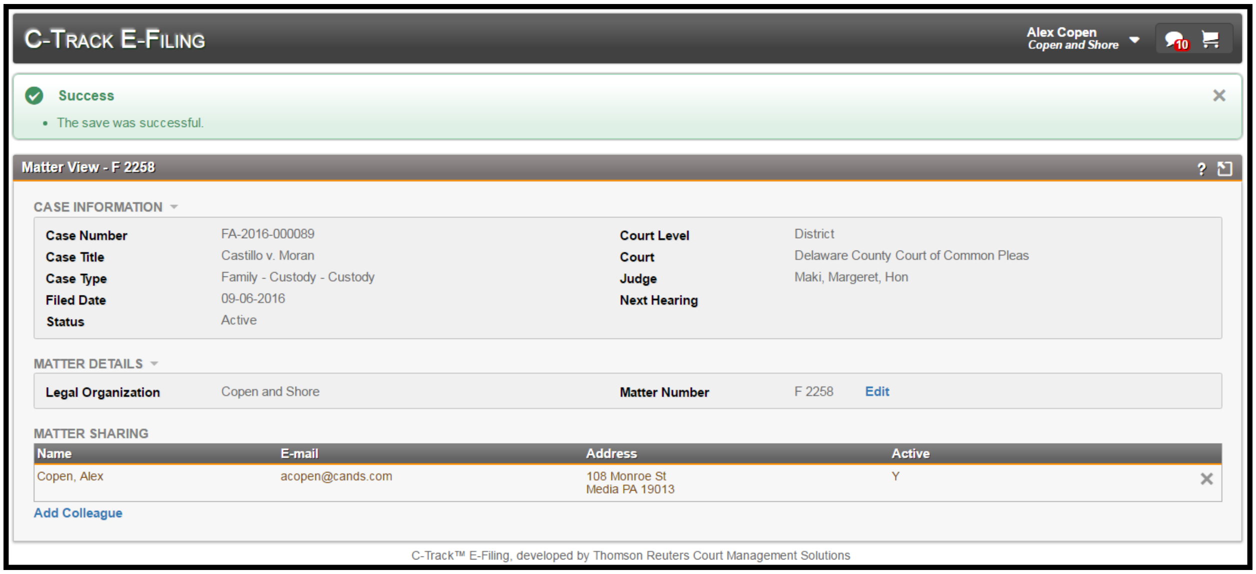


Fig. 1.50 Matter View screen – successful save of Matter Number

You have successfully added a Matter Number for a case filing. The **Green Success Notification** displays in the top content container, above the **Matter View** screen.

Note the Matter Number you entered appears in the **Matter Details** container and your user information displays in the **Matter Sharing** display table.

7. Click the **Add Colleague** link at the bottom left of the **Matter Sharing** display table.

The **Add Colleague** window appears.

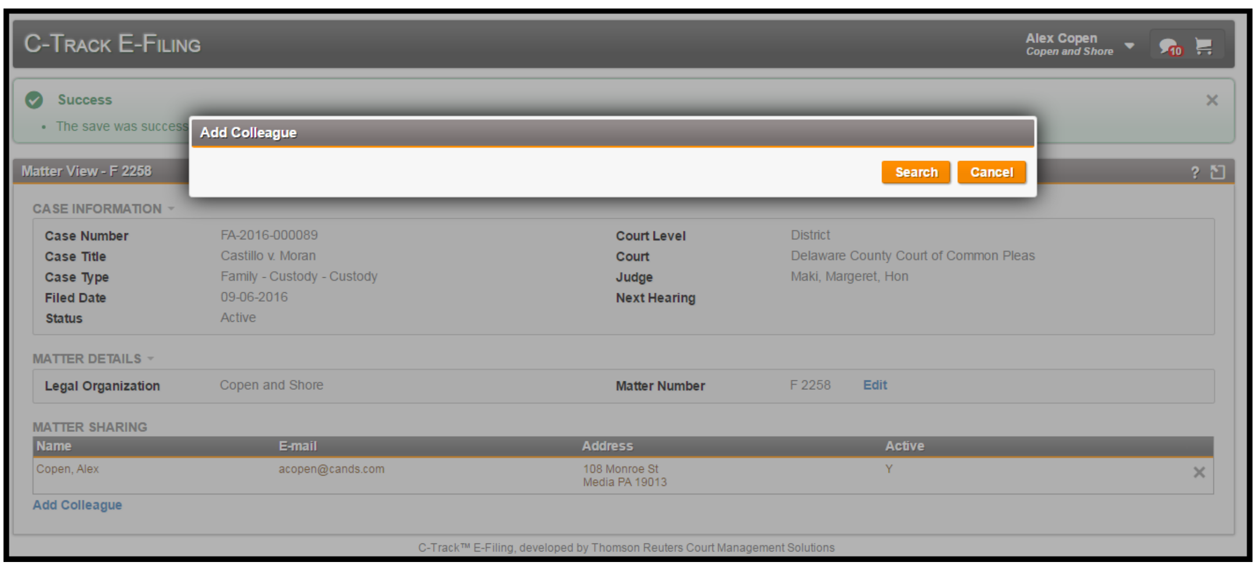


Fig. 1.51 Add Colleague window

8. Click **Search**.

All colleagues that are members of the Legal Organization to which you are currently associated appear in the **Add Colleague** display table.

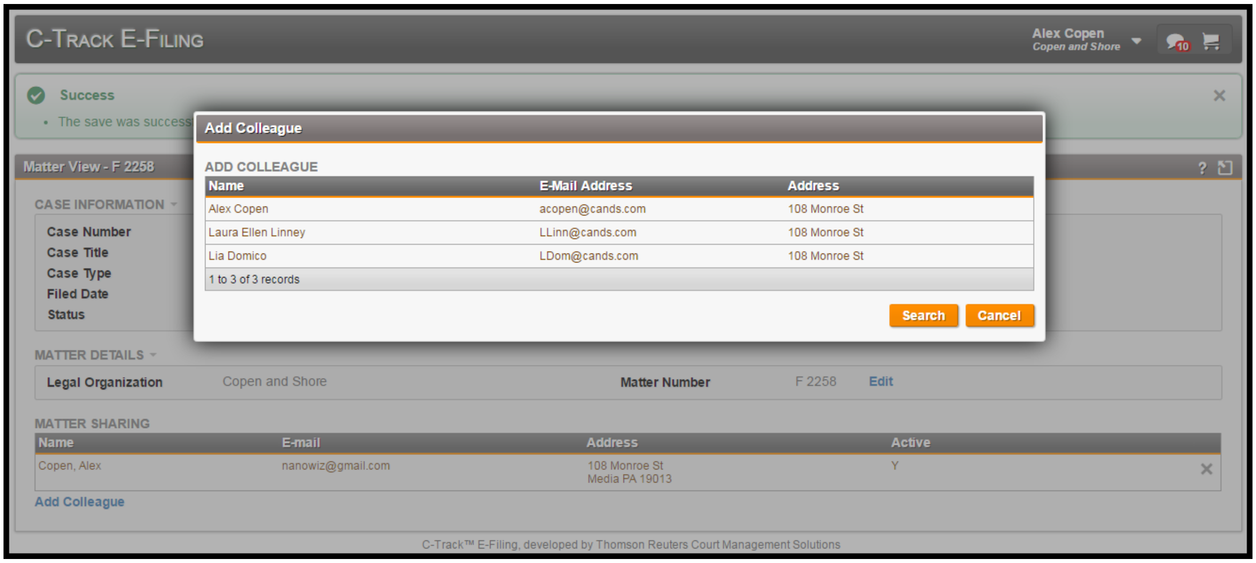


Fig. 1.52 Add Colleague window – Legal Org members display

9. Select a line item from the **Add Colleague** display table with whom you want to share this Matter.

You return to the **Matter View** screen. The colleague you selected appears in the **Matter Sharing** display table.

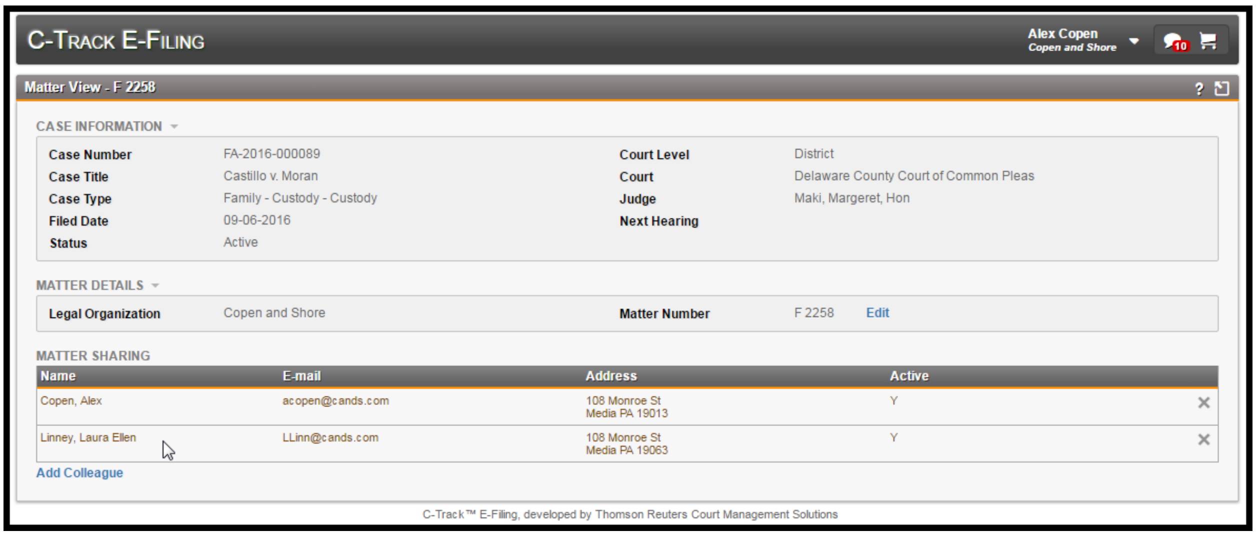


Fig. 1.53 Add Colleague window – Legal Org members display

Repeat steps 7 through 9 to share this matter with additional colleagues. Note the **X** at the far right of any line item in the **Matter Sharing** display table lets you remove the permission to share the matter. You can remove yourself if you no longer need to be associated to a matter.

Now we see the **My Matters** screen for the colleague with who we have shared the Matter.

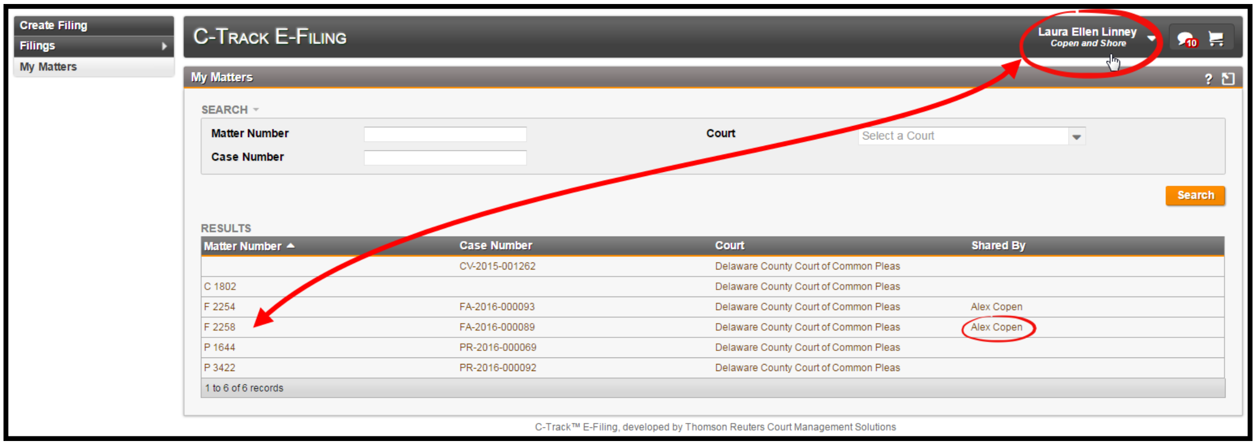


Fig. 1.54 My Matters screen – Shared Matter

Now we see the **My Matters** screen for the support staff of the original E-Filer. This user is authorized to access Matters created by the initial E-Filer as well as Matters shared with the E-Filer by other members of their Legal Organization who have shared Matters with them.

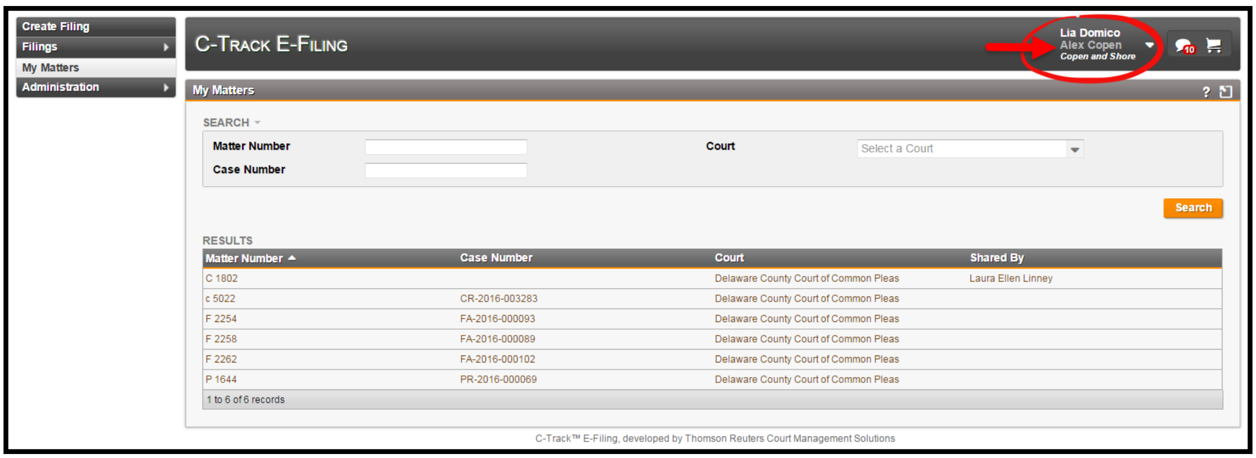


Fig. 1.55 My Matters screen – Support Staff

1.7 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

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

The **Create Filing** screen appears.

Fig. 1.56: 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.

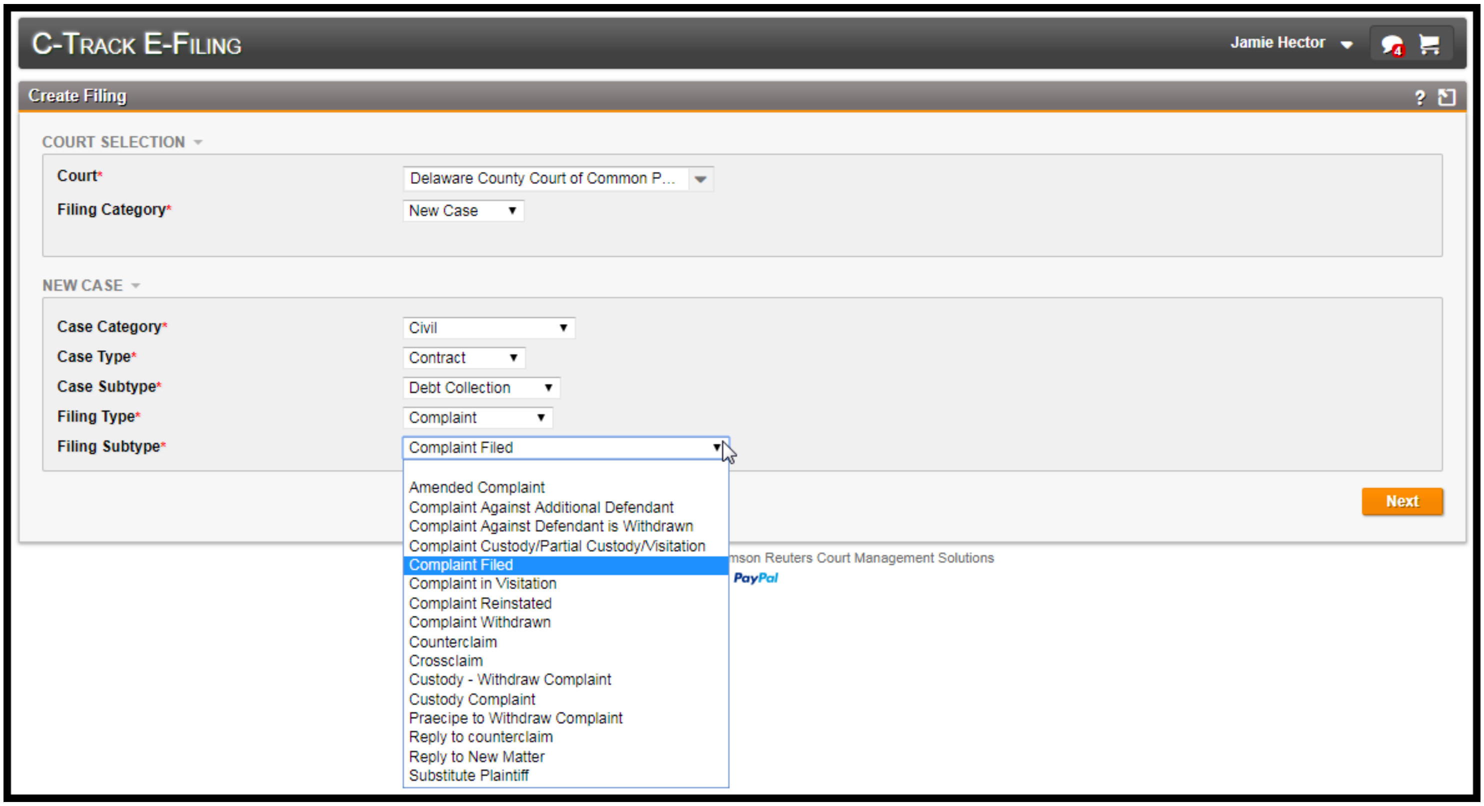


Fig. 1.57: New Case container – Case Category, Type, Subtype, Filing Type entered Filing Subtype exposed

4. Enter a **Matter Number**. This is optional and only used for Legal Organizations that use them for internal communications. You must **Switch Association** to a **Legal Organization** to use this function.
5. Select **Case Category**.
6. Select **Case Type**.
7. Select **Case Subtype**.
8. Select **Filing Type**.
9. Select **Filing Subtype**.
10. 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.

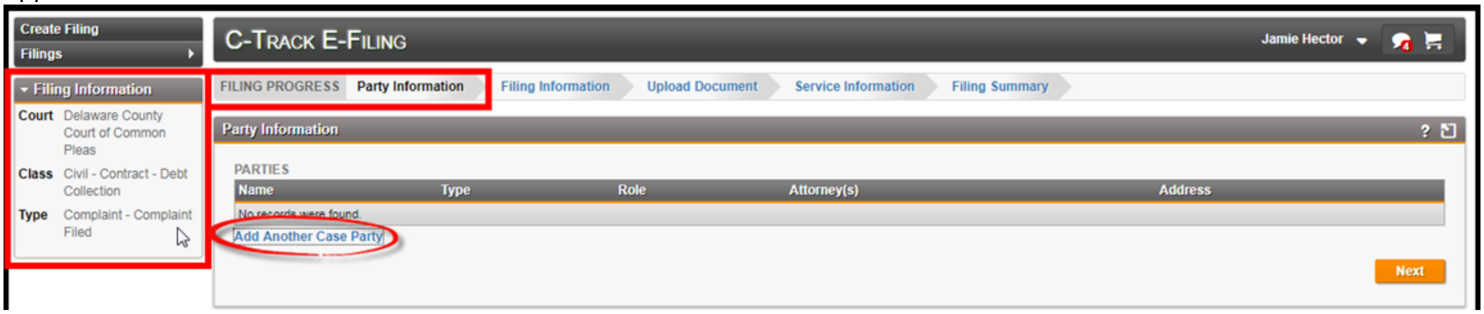


Fig. 1.58: Filing Progress– Party Information

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

The **Party Information** window appears.

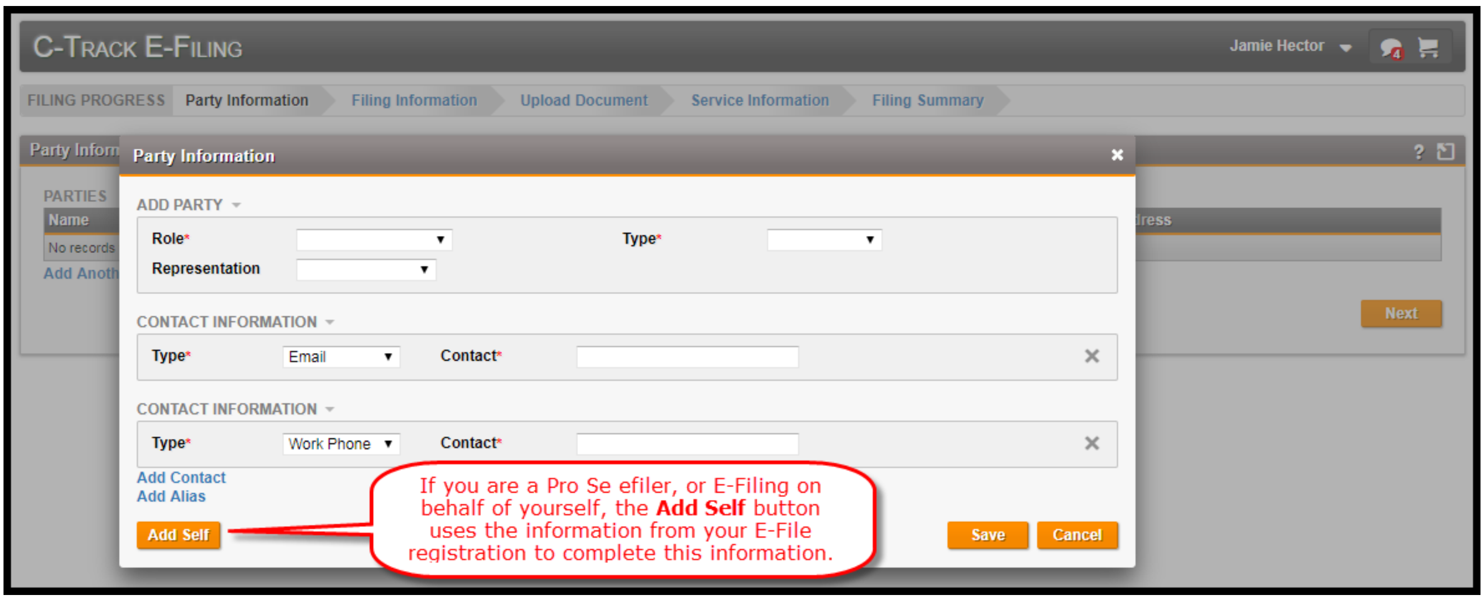


Fig. 1.59: Party Information window

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.

12. Select **Role**.

With the selection of Role, a second container, **Representer**, is added to the window.

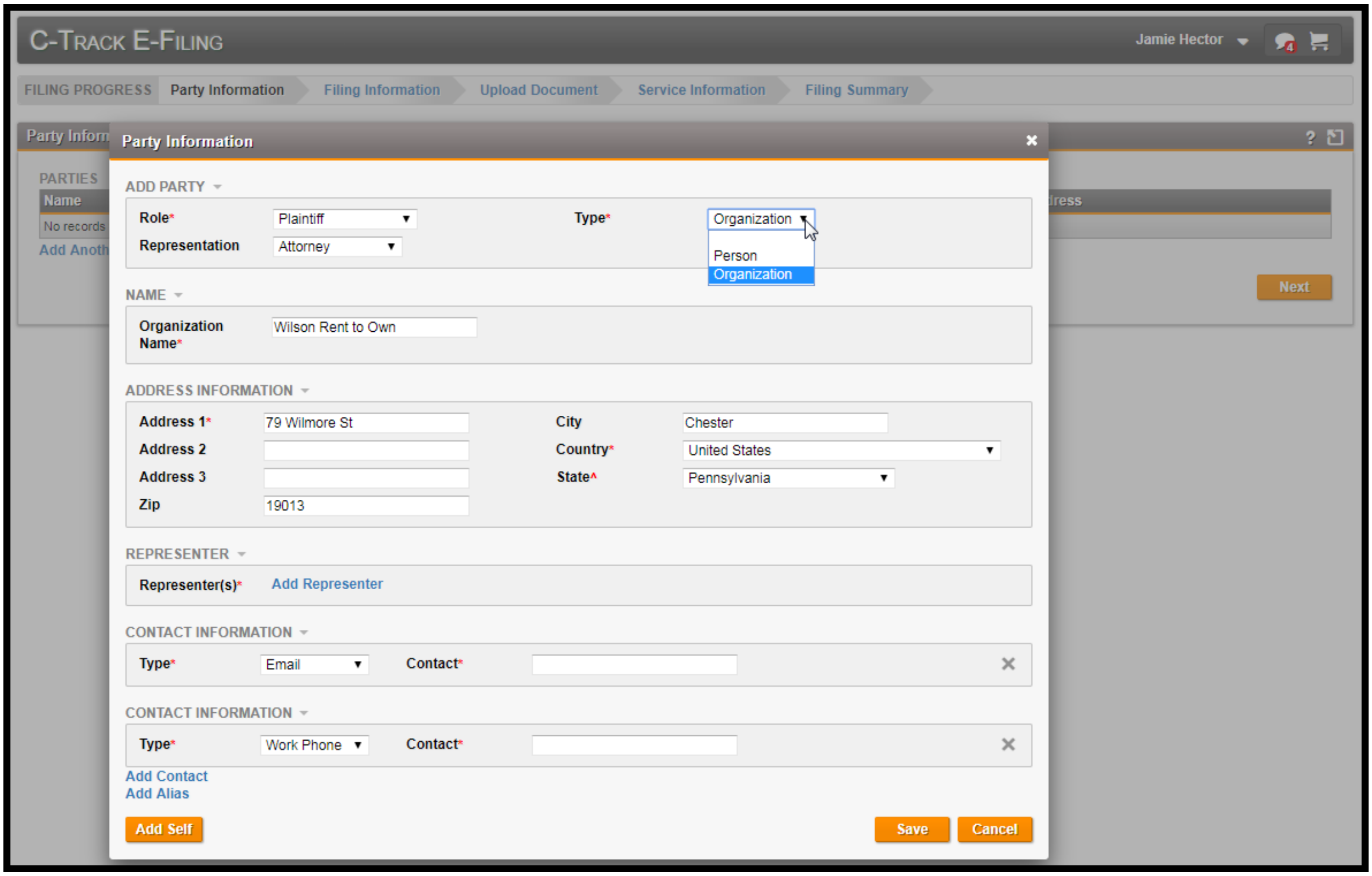


Fig. 1.60: Party Information window –containers added based on **Party** selections

13. Select **Type**, in the **Add Party** container.

With the selection of **Type**, a third container, **Name**, is added to the window.

14. Select **Representation**, in the **Add Party** container.
15. Enter **Last Name**, in the **Add Party** container.
16. Enter **First Name**.
17. Click the **Add Representer** link.

The **Representer Search** window appears.

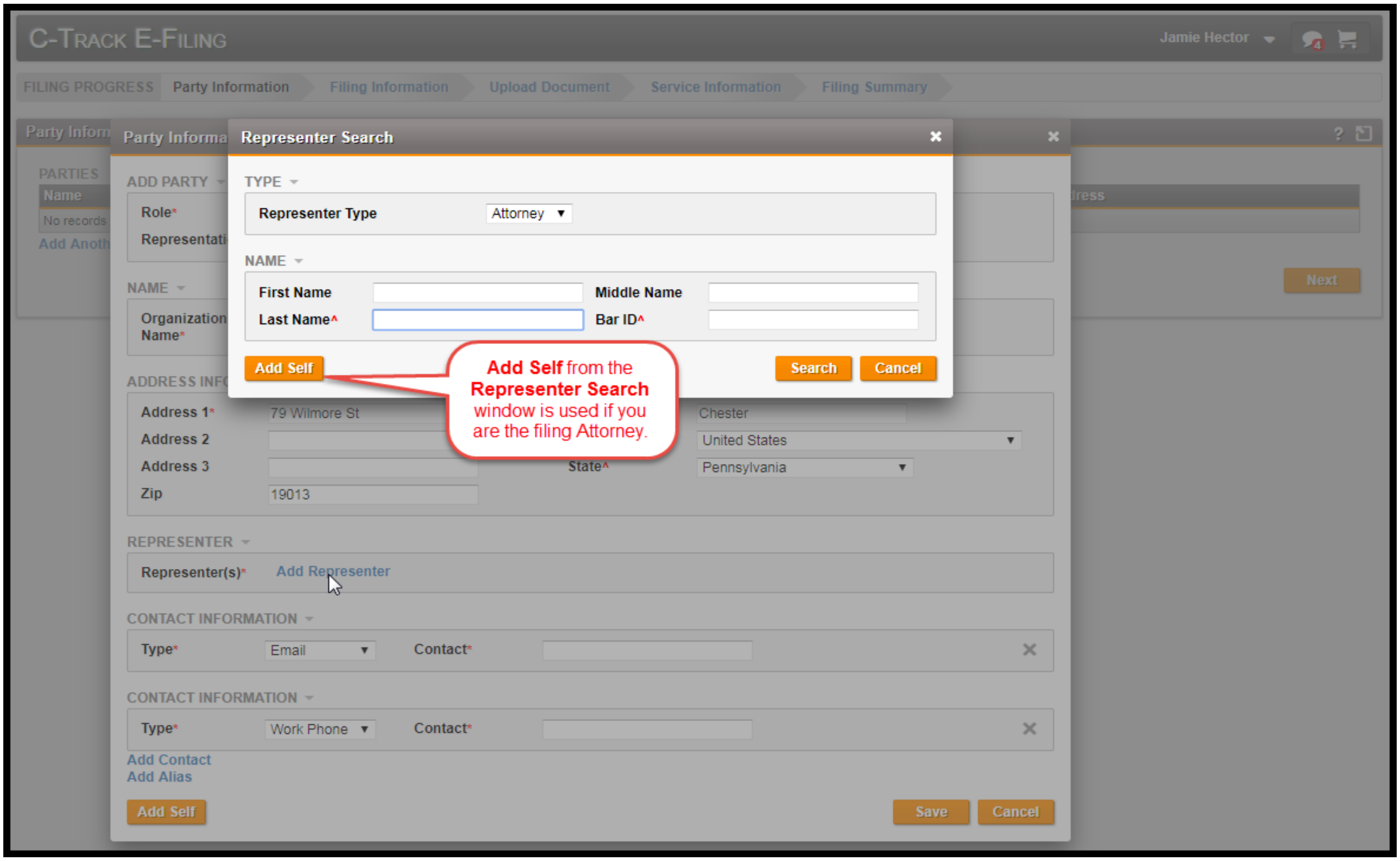


Fig. 1.61: Representer Search window

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.

18. Click **Add Self**.

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

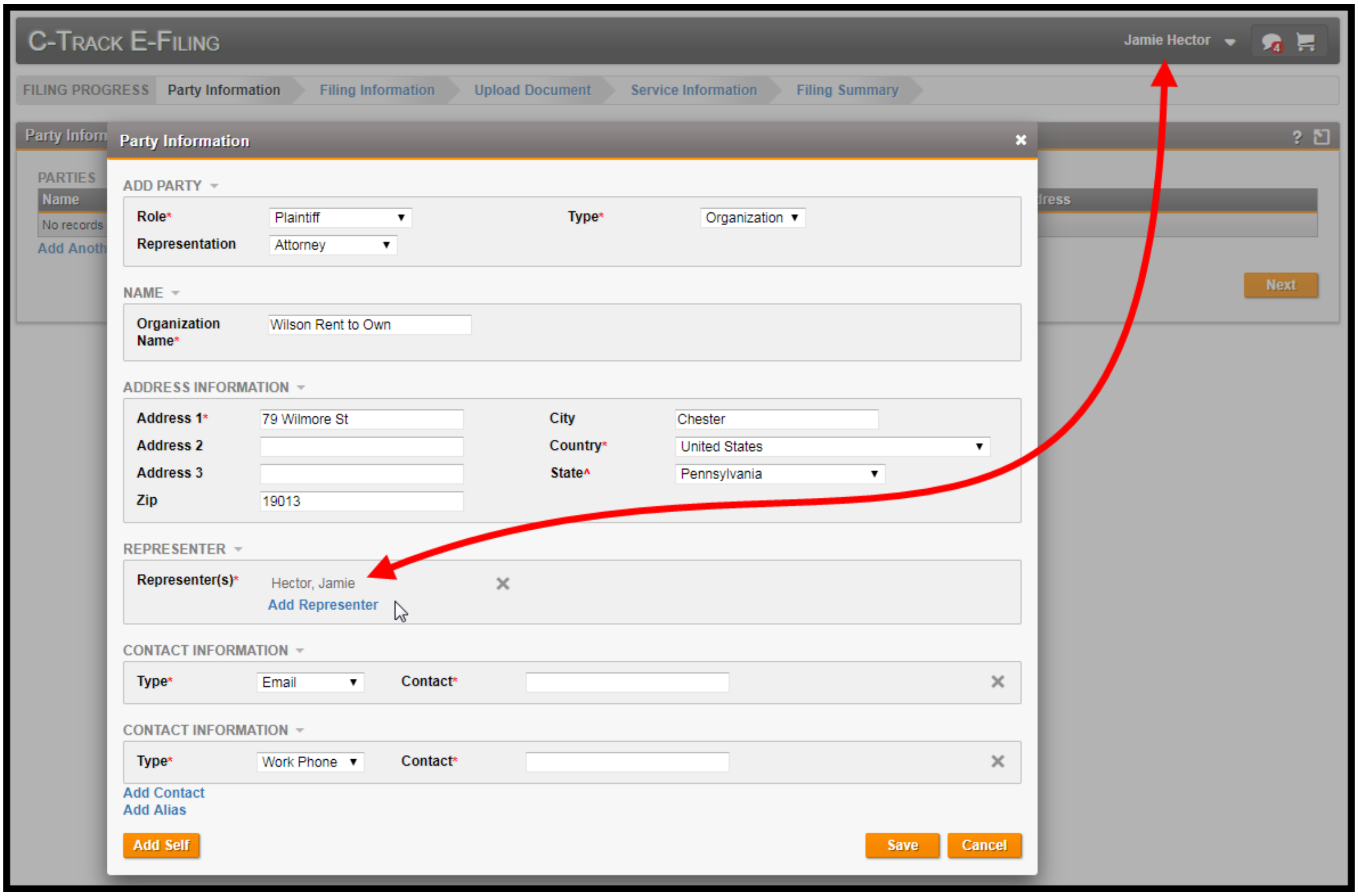


Fig. 1.62: Party Information window – **Add Self** functionality

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 staff selected **Add Myself** for representer.

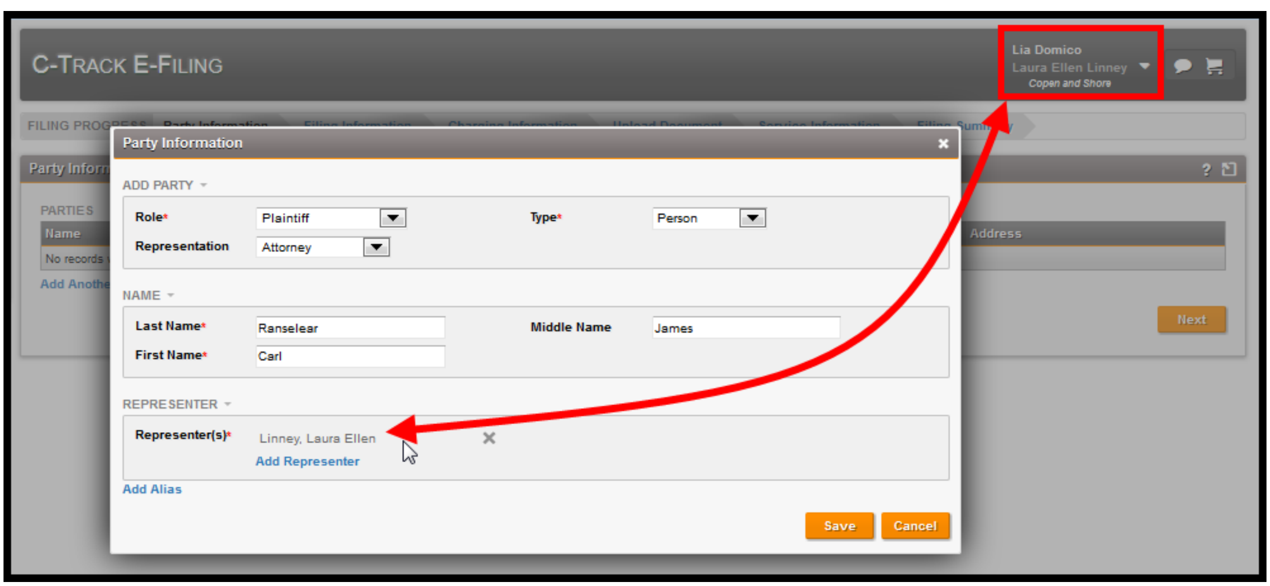


Fig. 1.63: Party Information window – support staff associated through a Legal Organization files for Attorney

19. Complete the **Contact Information** for the party you are creating for the case.
20. Click **Save**.

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

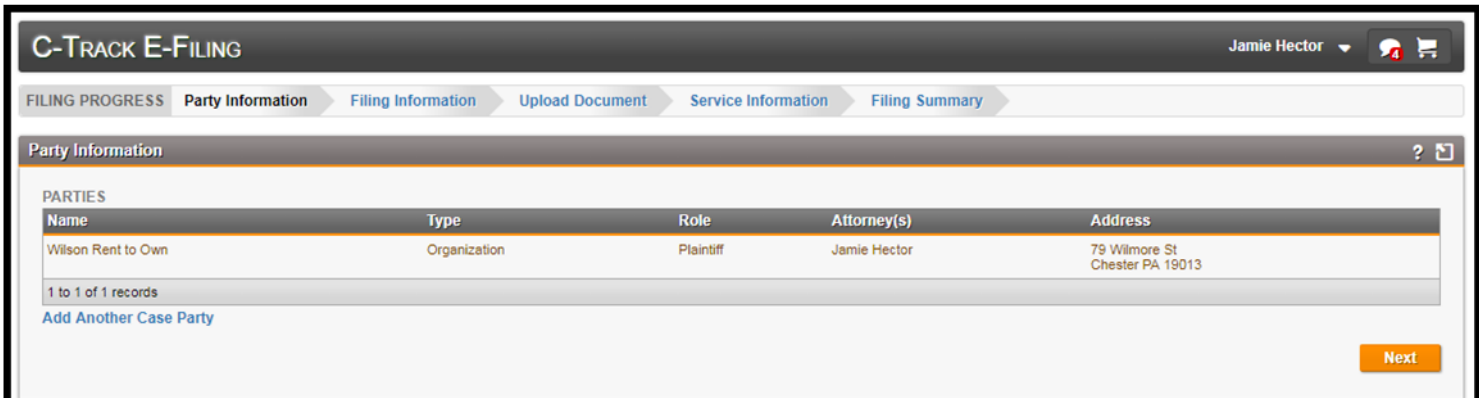


Fig. 1.64: Filing Progress screen – Party added

21. Click the **Add Another Case Party** link.
22. Select **Role**.
23. Select **Type**. Here, we select Organization. Note the containers present different fields to capture contact information.
24. 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.
25. Enter **Organization Name**.
26. Enter **Address**.

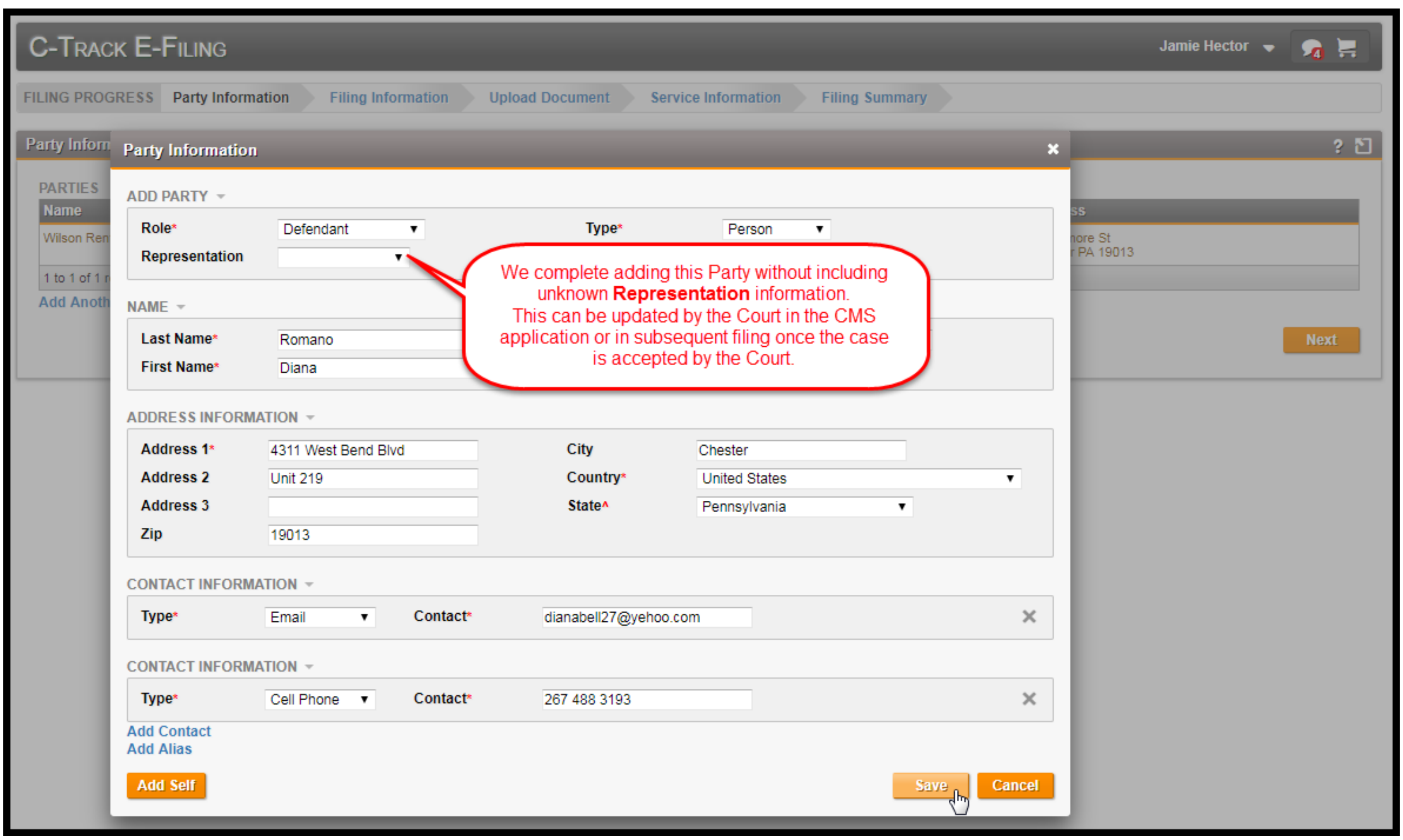


Fig. 1.65: Party Information – Party added

27. Click **Save**.

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

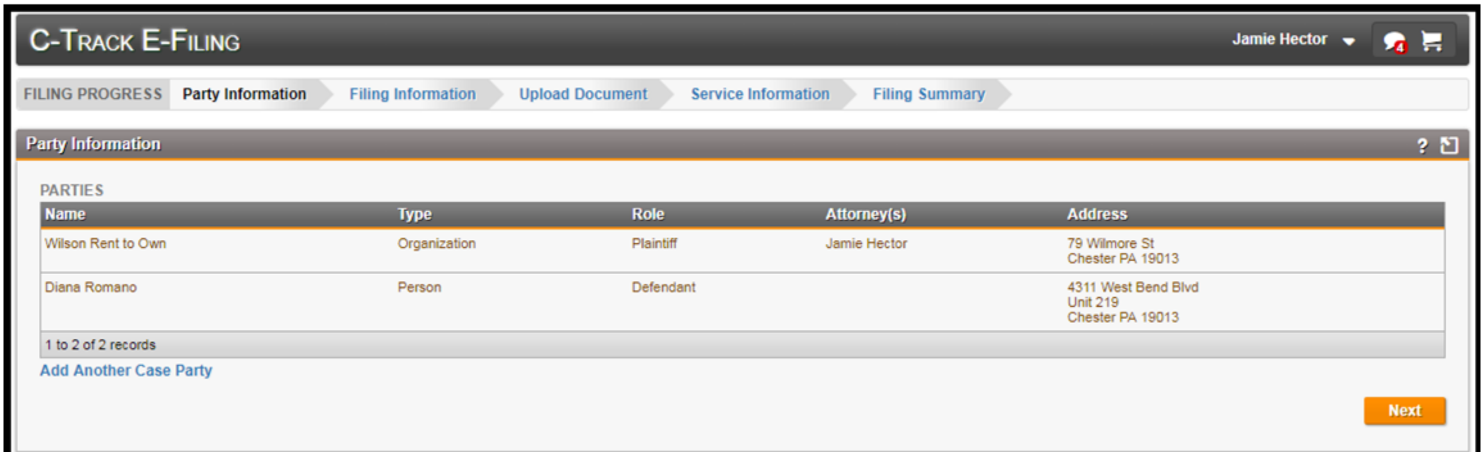


Fig. 1.66: Filing Progress screen – Party added

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

28. 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.

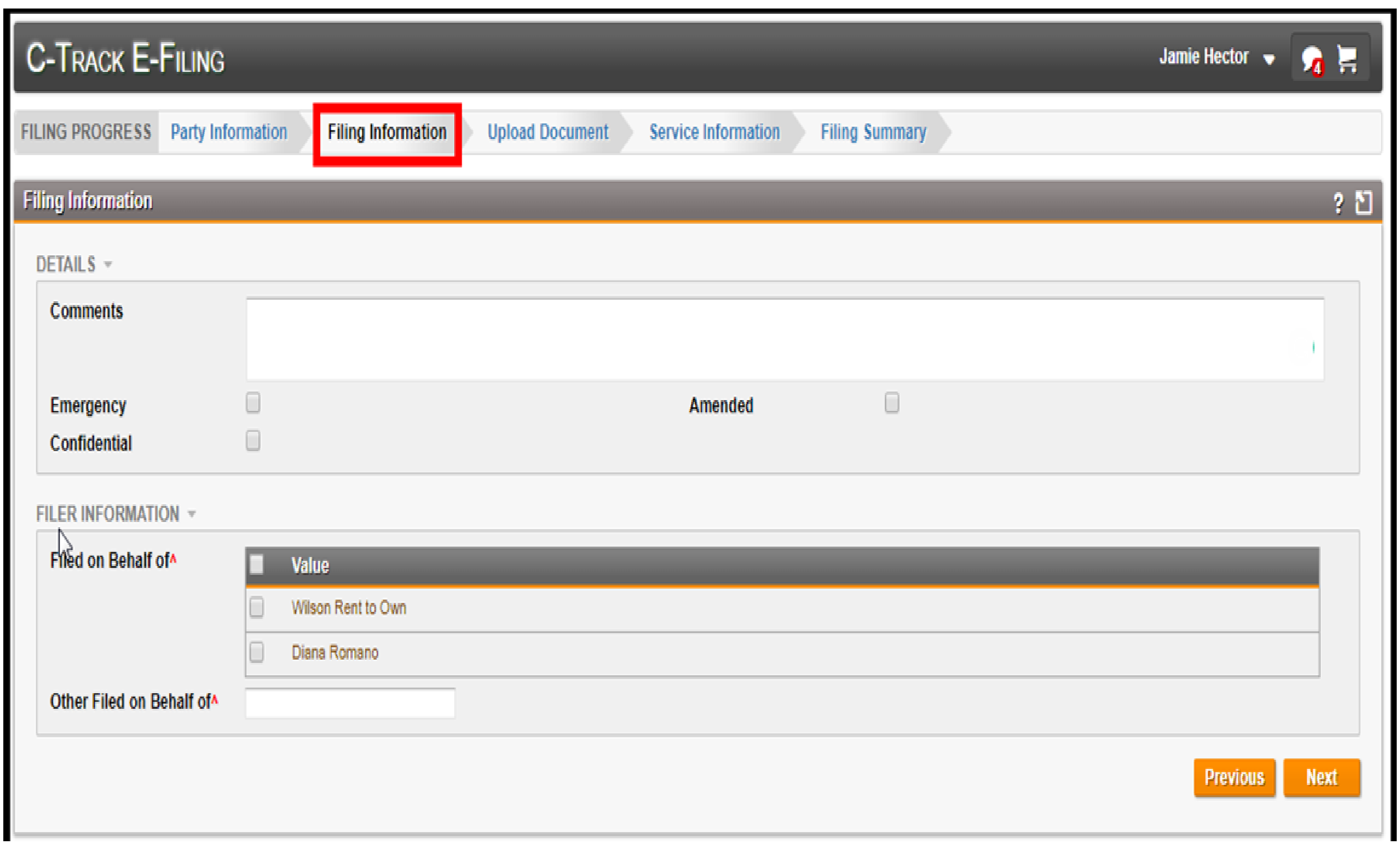


Fig. 1.67: Filing Information screen

> ➢ **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.

The **Filing Information** screen has two containers. 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. You can also add a **Comment** to the filing.

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. 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 unless the user has authorized permission to view cases marked confidential. Attorneys who are added to the **E-File User Access** screen manually by Court Personnel or through automation will have access to search for and file on Confidential cases. 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
User Not on EF User Access List	Search / Access Case	✗	✗
	E-File into Case	✓	✗
User on EF User Access List	Search / Access Case	✓	✓
	E-File into Case	✓	✓

Fig. 1.68: Confidential controls

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

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.

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

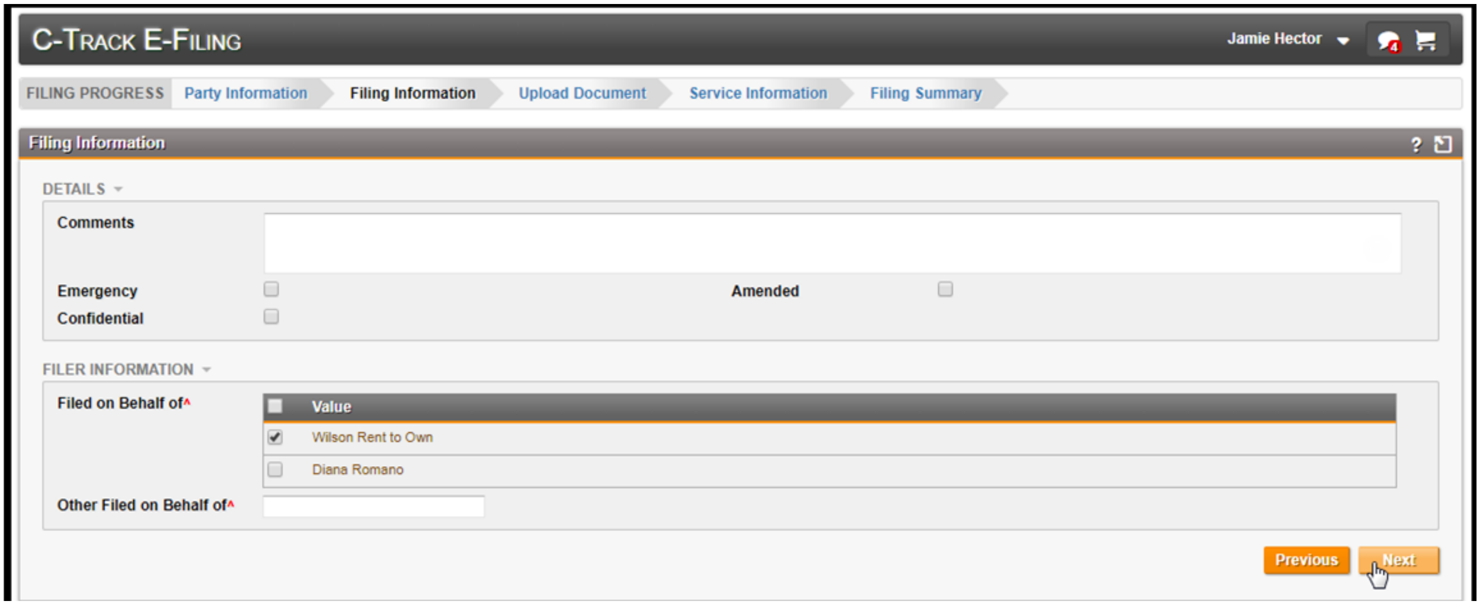


Fig. 1.69: Filing Information screen – selections complete

30. Click **Next**.

The **Upload Document** screen appears.

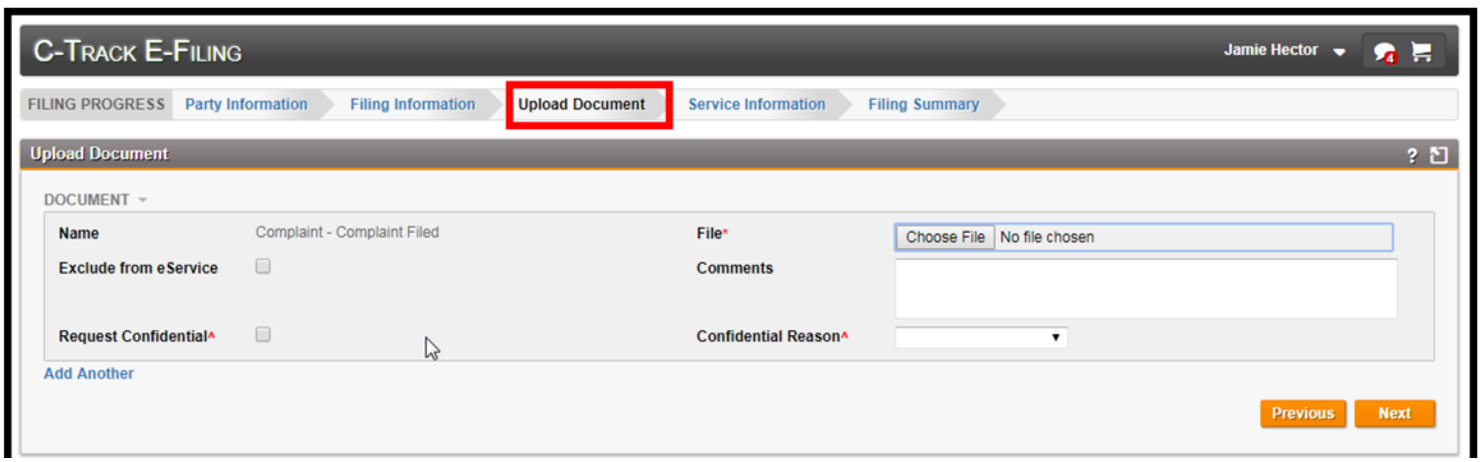


Fig. 1.70: Upload Document screen

The **Upload Document** screen has a single container. The **Documents** container lets you upload documents that will be electronically transferred to the Court when you submit the filing. You can specify **Request Confidential** and **Exclude from 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.

31. 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.

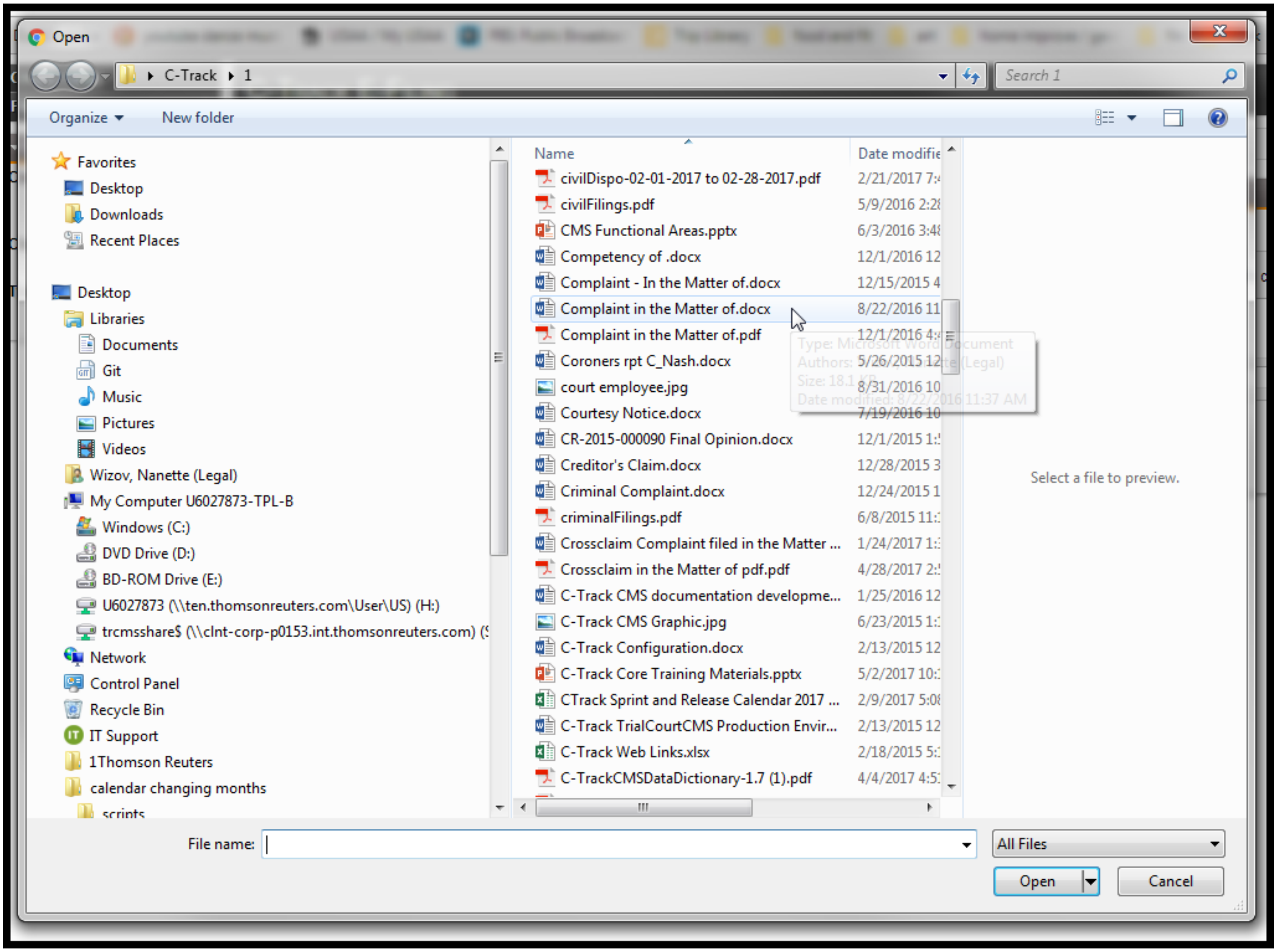


Fig. 1.71: Open browser window

32. Select the file you want to upload.
33. Click **Open**.

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

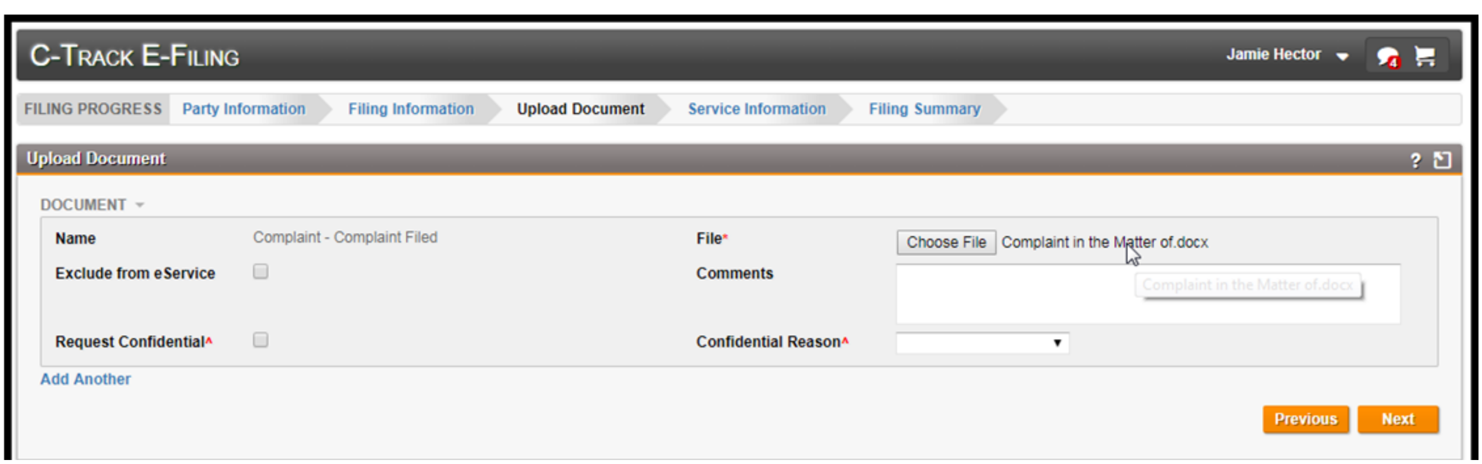


Fig. 1.72: Upload Document screen – file selected

34. Click **Next**.

The **Service Information** screen appears.

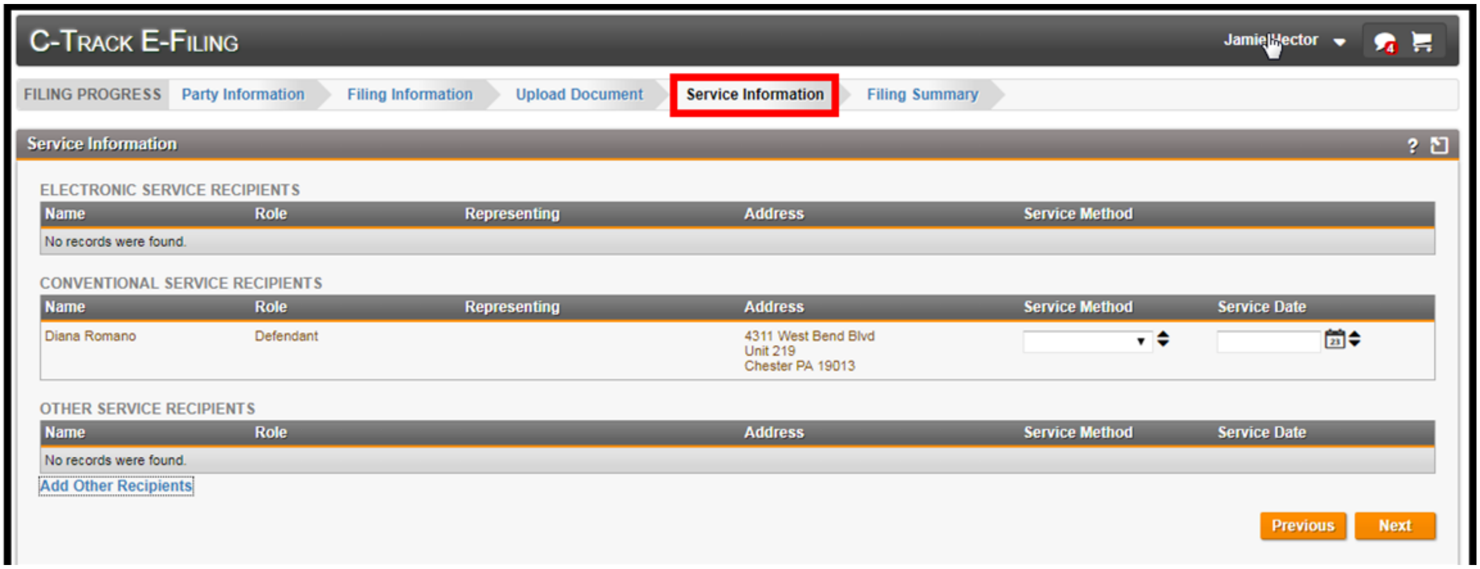


Fig. 1.73: Service Information screen

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 **Conventional Service Recipients** container displays parties or participants that will receive notice of the filing by conventional means, typically by mail. The **Service Method** drop down lets you select Not Served for entities that are listed but should not receive notice of the filing.

- **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.

The **Other Service Recipients** container lets you click the **Add Other Recipients** link to search for entities that are not case parties but that need to receive notice of the filing. The **Add Other Recipients** link lets you first search the C-Track E-File system for the entity. 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.

35. Select **Service Method**.
36. Enter **Service Date**.
37. Click **Next**.

The **Filing Summary** screen appears.

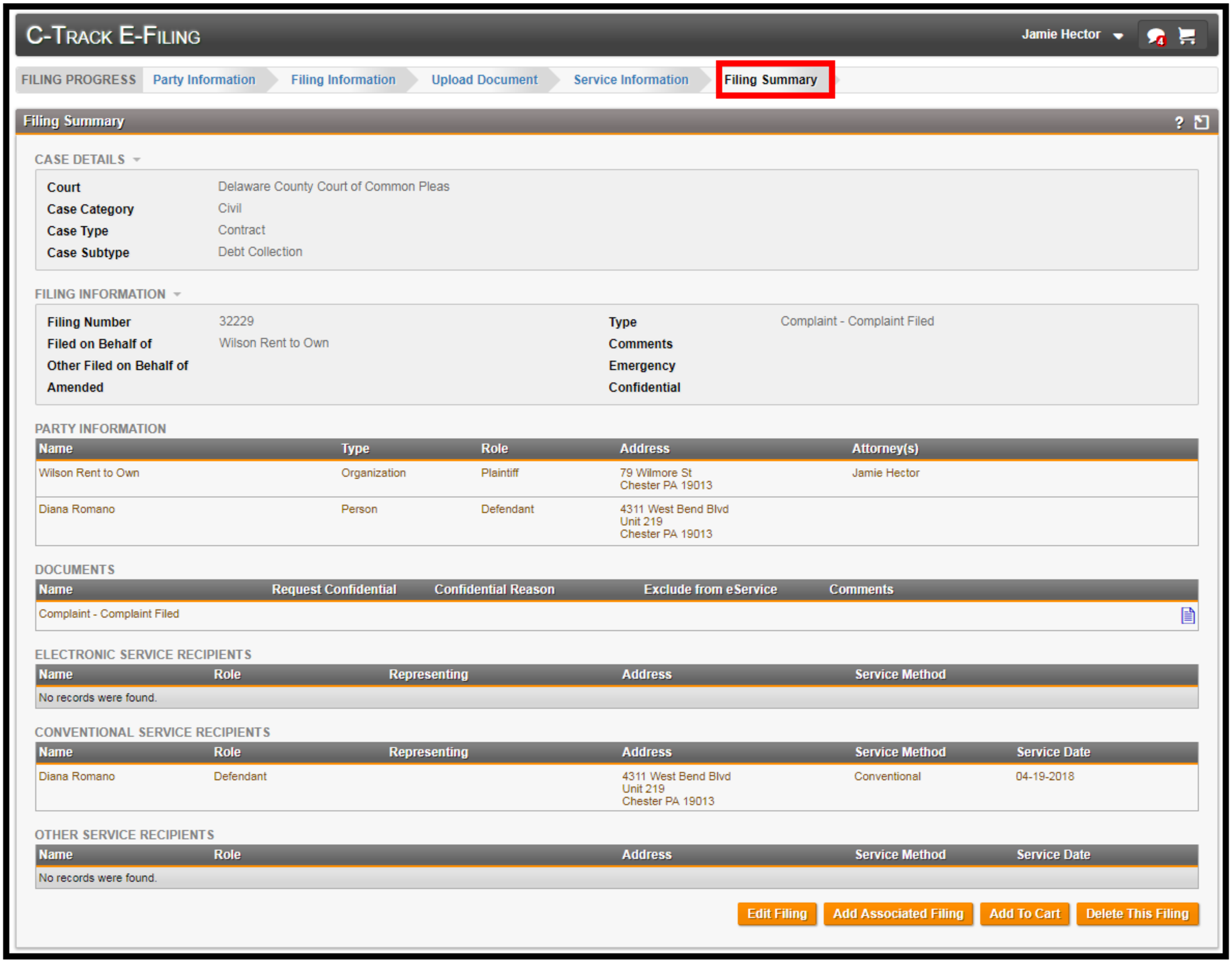


Fig. 1.74: Filing Summary screen

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 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.

38. Click **Add To Cart**.

The **Cart** screen appears.

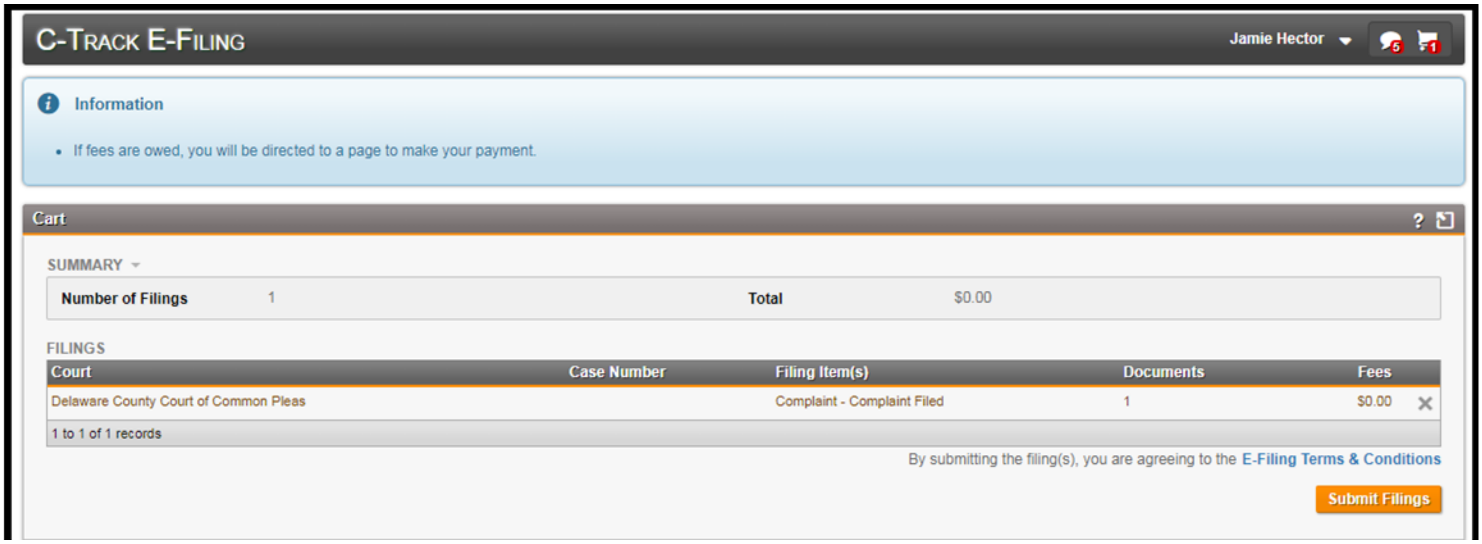


Fig. 1.75: Cart screen

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 **Matter Number** is a configurable number and can be used by Legal Organizations and filers from legal organizations as an internal identifier. This lets Legal Organization filers with the proper security permission view filings by other members of the Legal Organization. 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 Court 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.

39. 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 process, the **Submission Confirmation** screen appears.

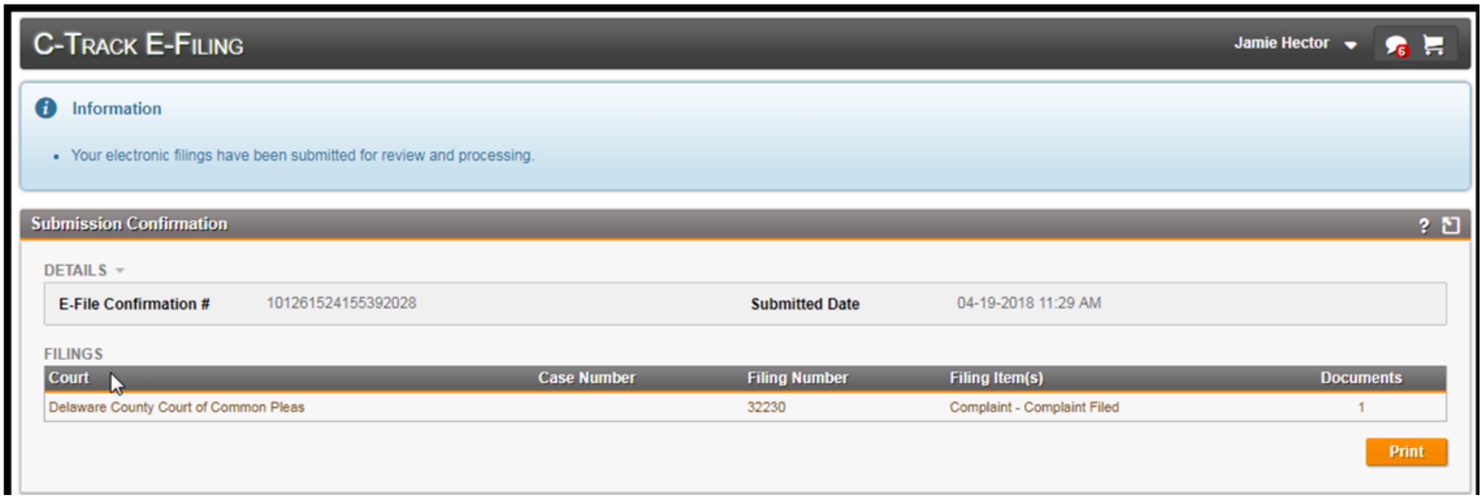


Fig. 1.76: Submission Confirmation screen

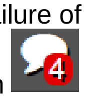
You have successfully submitted as electronic filing for a new case in the C-Track E-Filing application.

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  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 Court 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 will also appear in the **Notifications** icon  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.

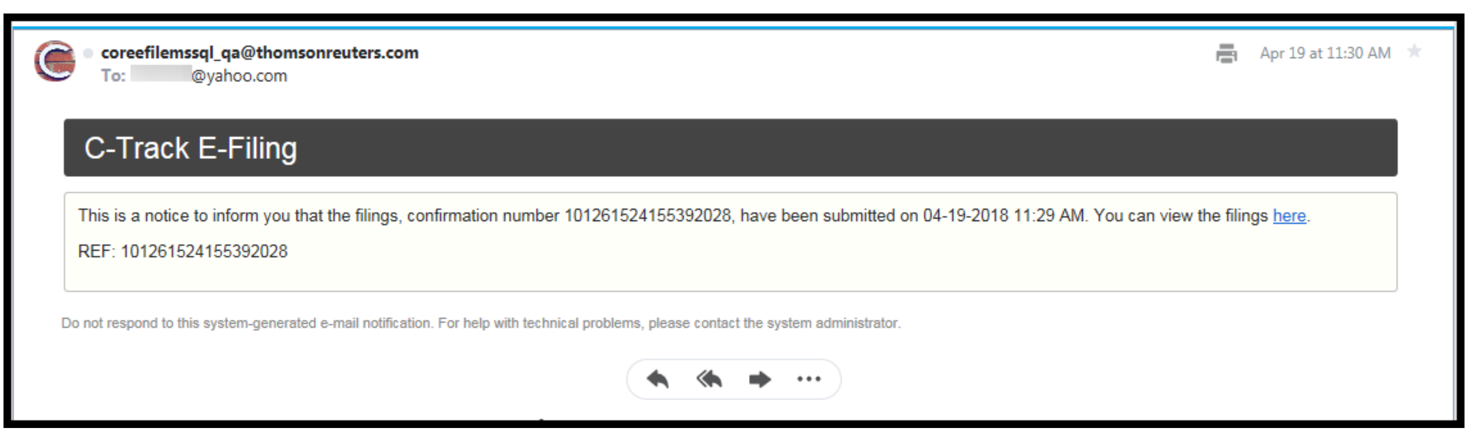
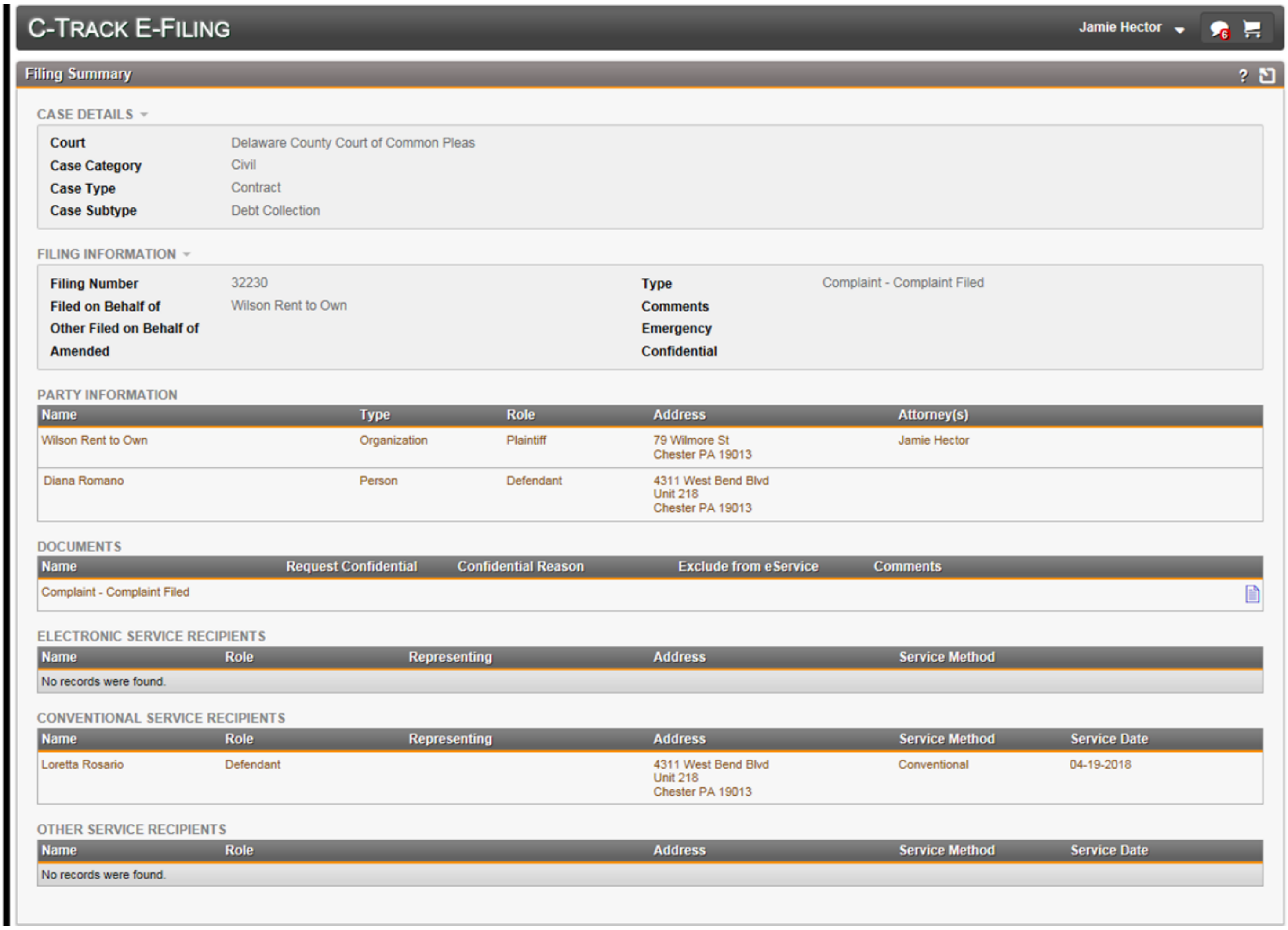


Fig. 1.77: Email Confirmation

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.


C-TRACK E-FILING

Jamie Hector

Filing Summary

CASE DETAILS

Court	Delaware County Court of Common Pleas
Case Category	Civil
Case Type	Contract
Case Subtype	Debt Collection

FILING INFORMATION

Filing Number	32230	**Type**	Complaint - Complaint Filed
Filed on Behalf of	Wilson Rent to Own	**Comments**	
Other Filed on Behalf of		**Emergency**	
Amended		**Confidential**	

PARTY INFORMATION

Name	Type	Role	Address	Attorney(s)
Wilson Rent to Own	Organization	Plaintiff	79 Wilmore St Chester PA 19013	Jamie Hector
Diana Romano	Person	Defendant	4311 West Bend Blvd Unit 218 Chester PA 19013	

DOCUMENTS

Name	Request Confidential	Confidential Reason	Exclude from eService	Comments
Complaint - Complaint Filed				

ELECTRONIC SERVICE RECIPIENTS

Name	Role	Representing	Address	Service Method
No records were found.				

CONVENTIONAL SERVICE RECIPIENTS

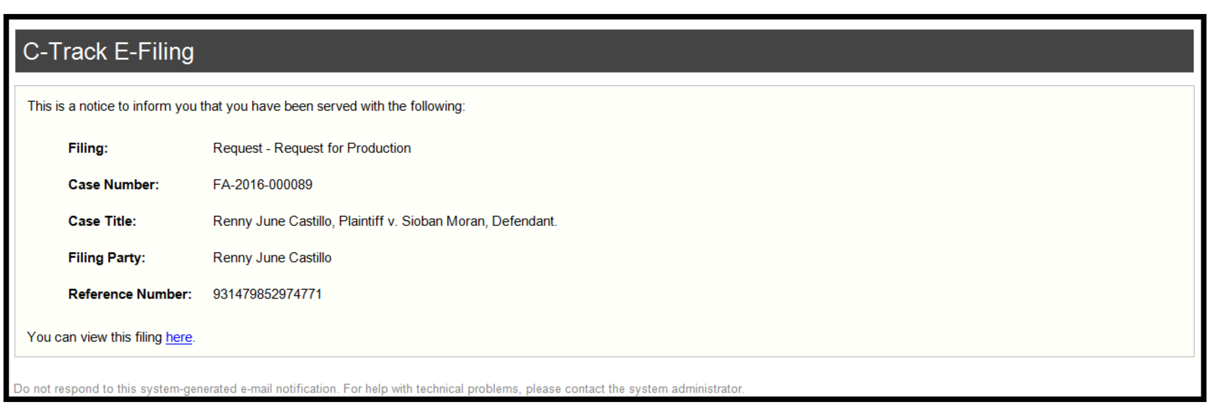
Name	Role	Representing	Address	Service Method	Service Date
Loretta Rosario	Defendant		4311 West Bend Blvd Unit 218 Chester PA 19013	Conventional	04-19-2018

OTHER SERVICE RECIPIENTS

Name	Role	Address	Service Method	Service Date
No records were found.				

Fig. 1.78: Filing Summary screen

Additionally, any party that was served electronically with a successfully processed filling receives an email similar to the notification shown below.


C-Track E-Filing

This is a notice to inform you that you have been served with the following:

Filing:	Request - Request for Production
Case Number:	FA-2016-000089
Case Title:	Renny June Castillo, Plaintiff v. Sioban Moran, Defendant.
Filing Party:	Renny June Castillo
Reference Number:	931479852974771

You can view this filing here.

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

Fig. 1.79: Email Confirmation to served party

Once the filing is process by the Court, another email is sent. When the case is accepted and the case number is automatically generated, the number is included in the email.

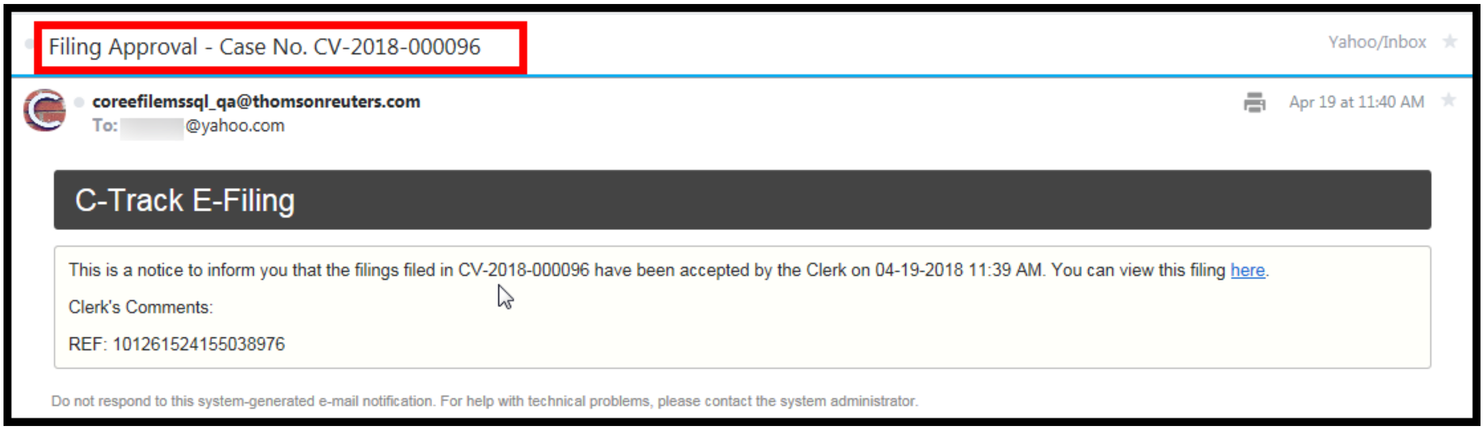


Fig. 1.80: Email Approval to E-Filer

1.8 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.

Fig. 1.81: Create Filing screen

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

The **Existing Case** container is added to the screen.

Fig. 1.82: Create Filing screen – **Existing Case** container is added

4. Enter **Case Number**.

Fig. 1.83: Create Filing screen – **Existing Case** error

If you enter a Case number for a case that does not exist or 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**.

Fig. 1.84: 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.

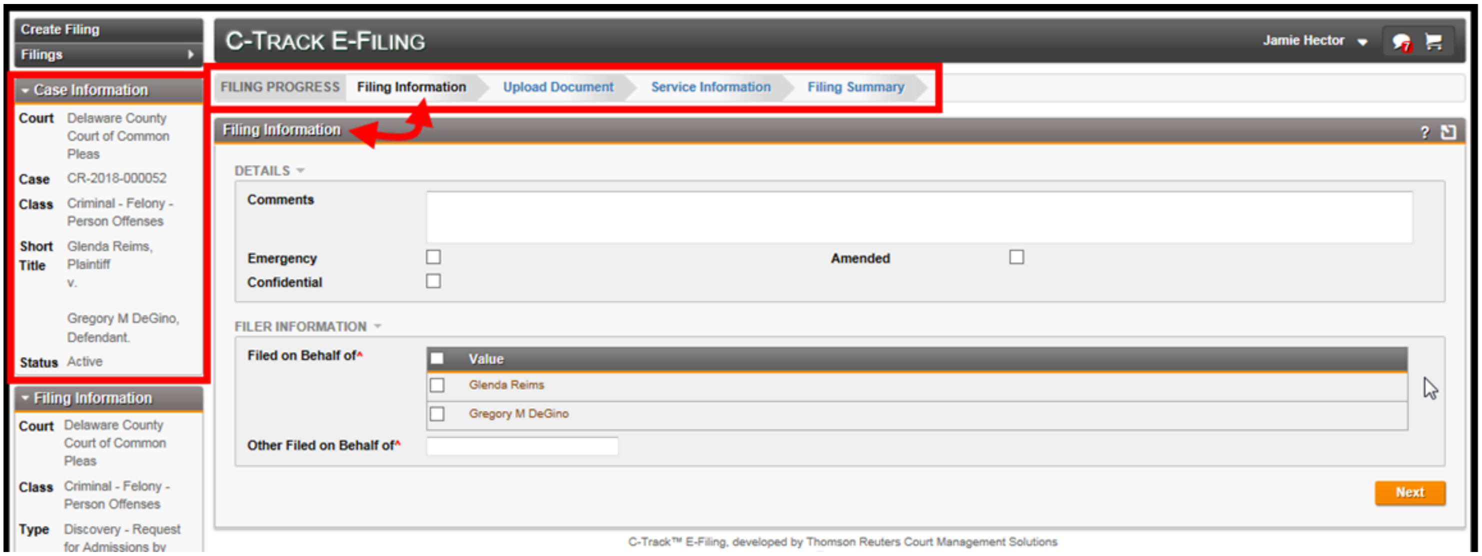


Fig. 1.85: Filing Information screen

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 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.

Below we see the same screen, **Filing Information**. The **Unsubscribe** button in the **Case Information** container indicates that you are Subscribed to the case.

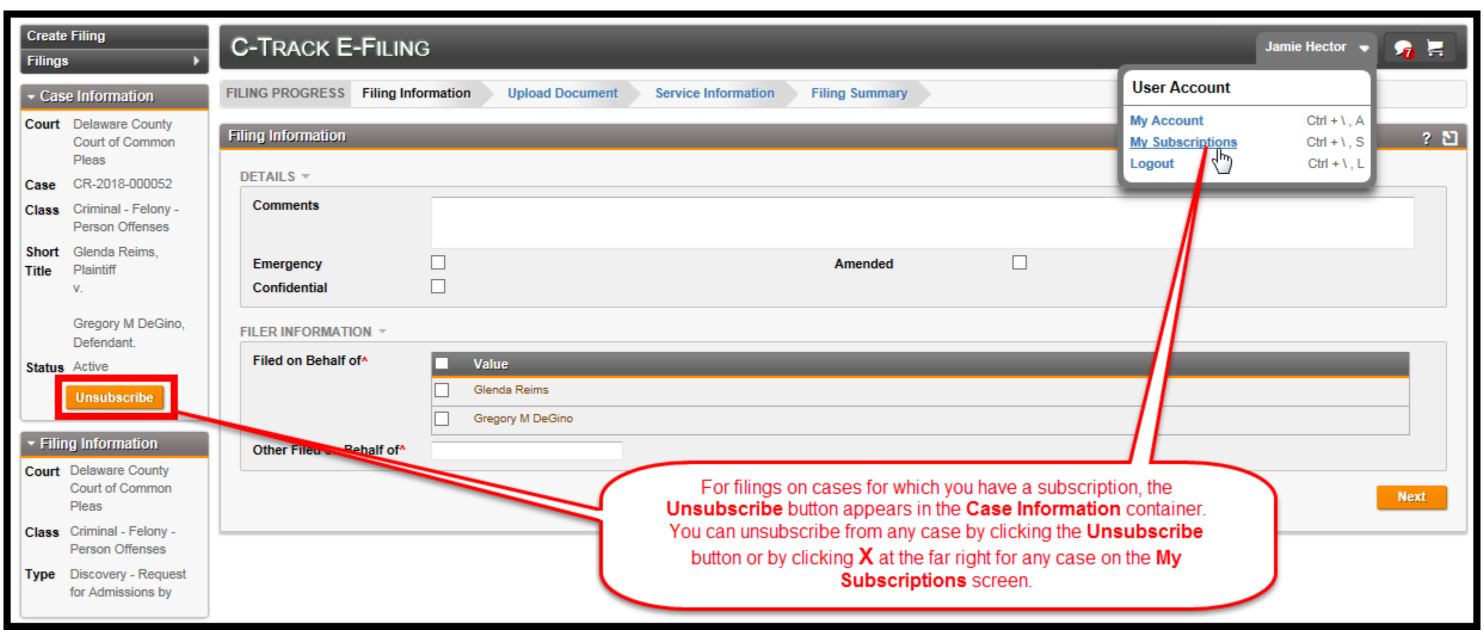


Fig. 1.86: Filing Information screen – **Unsubscribe** button

8. Select a **Filed on Behalf of** check box in the **Filer Information** container.
9. Click **Next**.

The **Upload Document** screen appears.

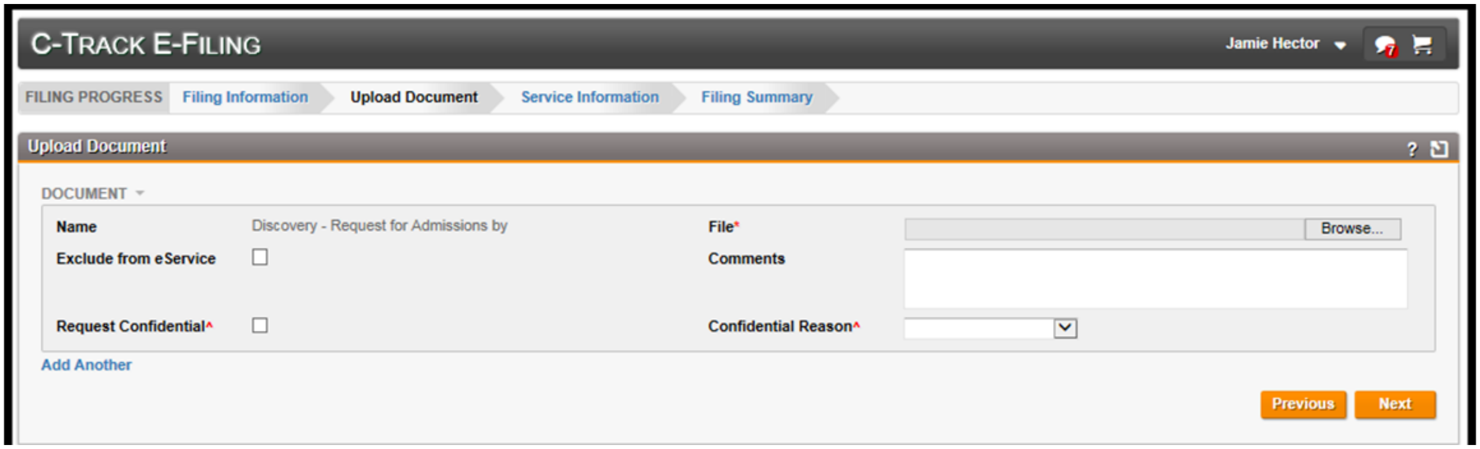


Fig. 1.87: Upload Document screen

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

.

10. Click **Choose File**.

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

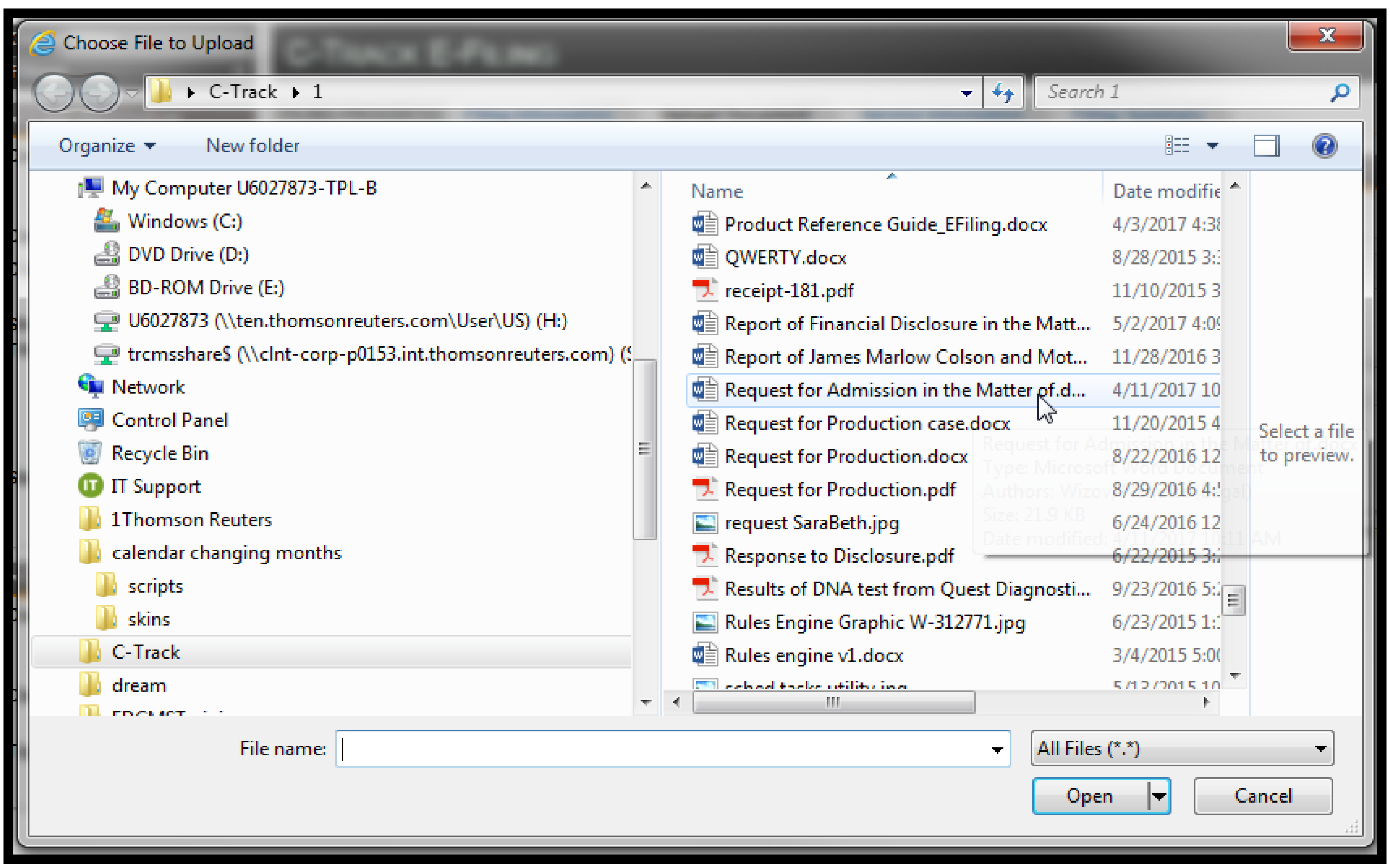


Fig. 1.88: Open browser window

11. Select the file you want to upload.
12. Click **Open**.

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

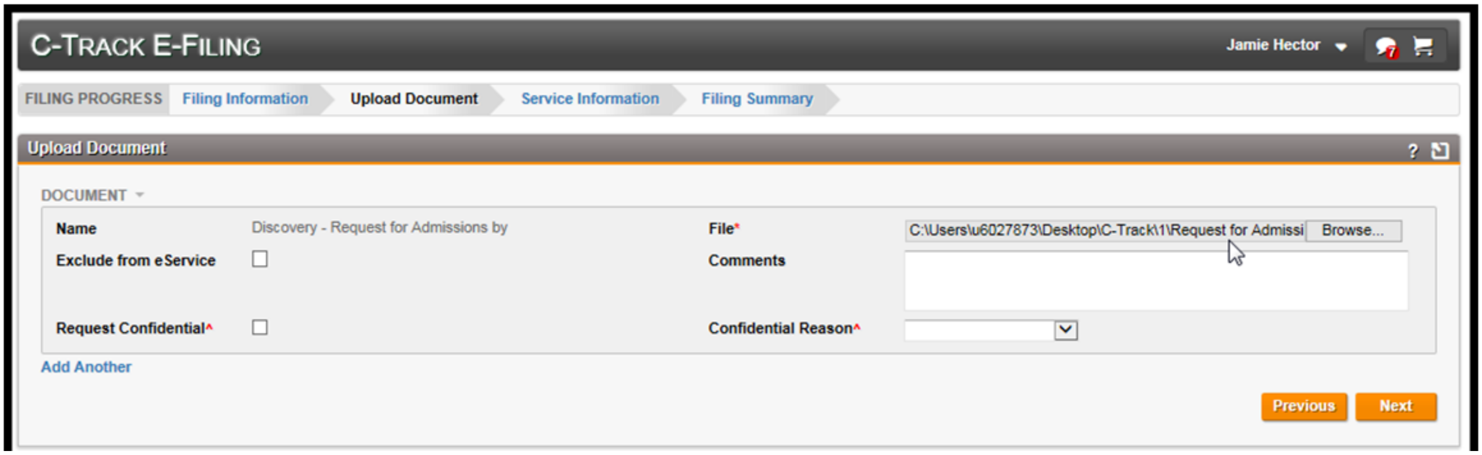


Fig. 1.89: Upload Document screen – file selected

13. Click **Next**.

The **Service Information** screen appears.

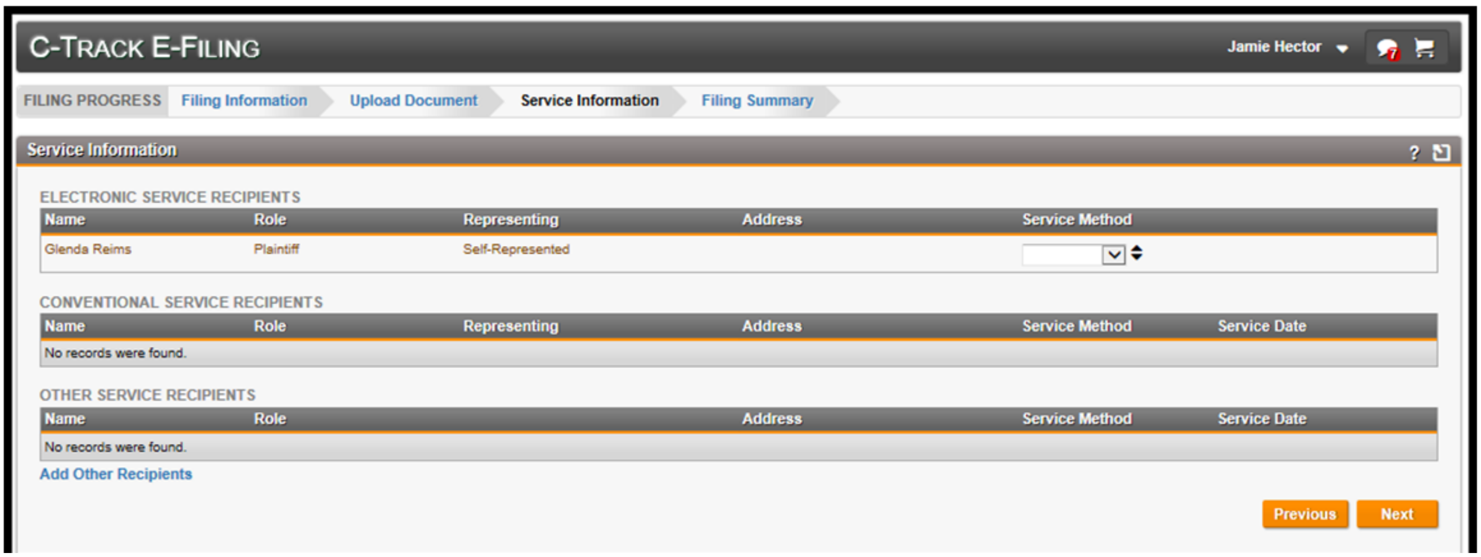


Fig. 1.90: Service Information screen

14. Select **Service Method** for **Electronic Service** and / or **Conventional Service Recipients**, as needed.
15. Enter **Service Date** for **Conventional Service Recipients**, as needed.
16. Click **Next**.

The **Filing Summary** screen appears.

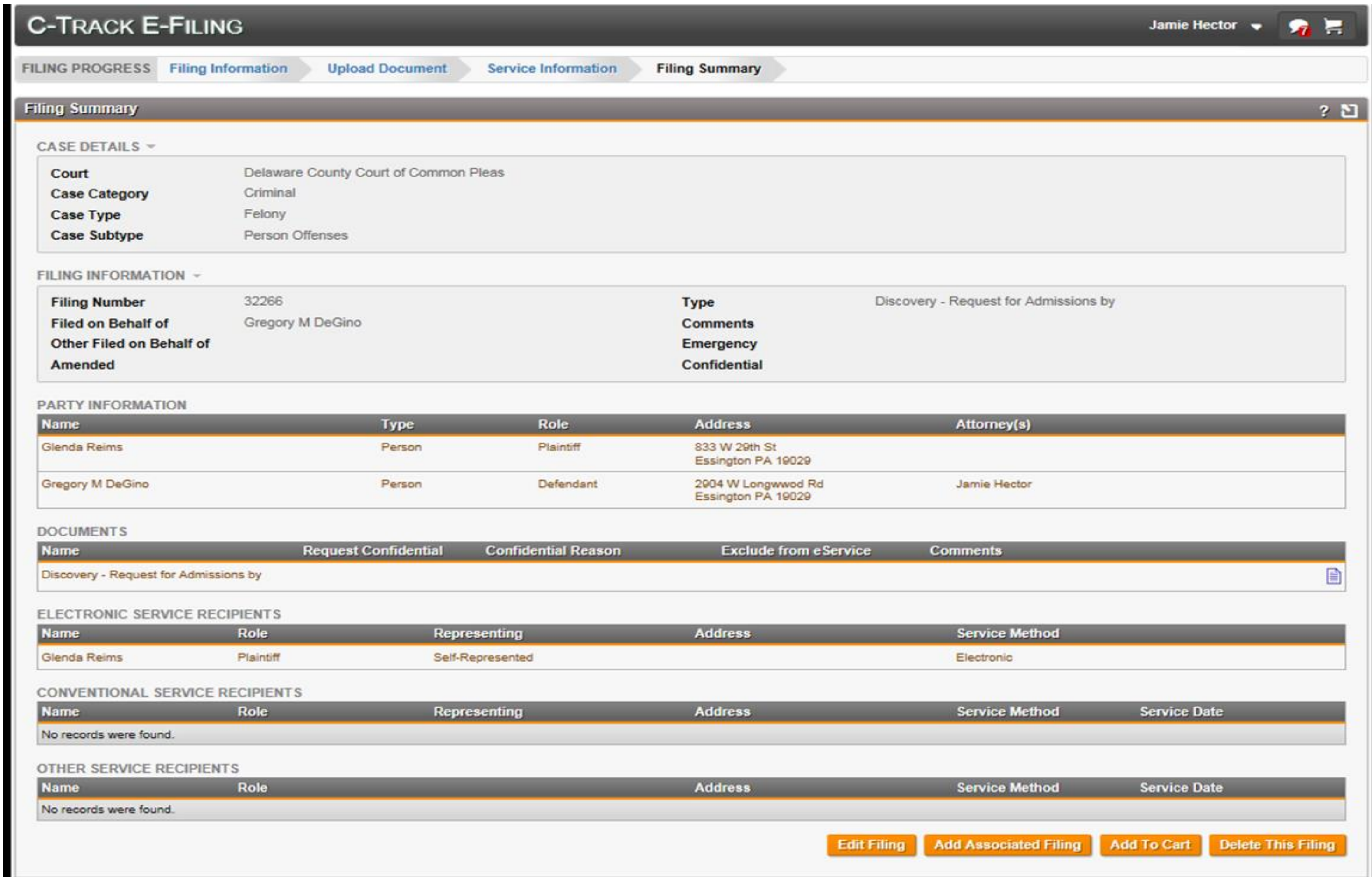


Fig. 1.91: Filing Summary screen

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

17. Click **Add to Cart**.

The **Cart** screen appears.

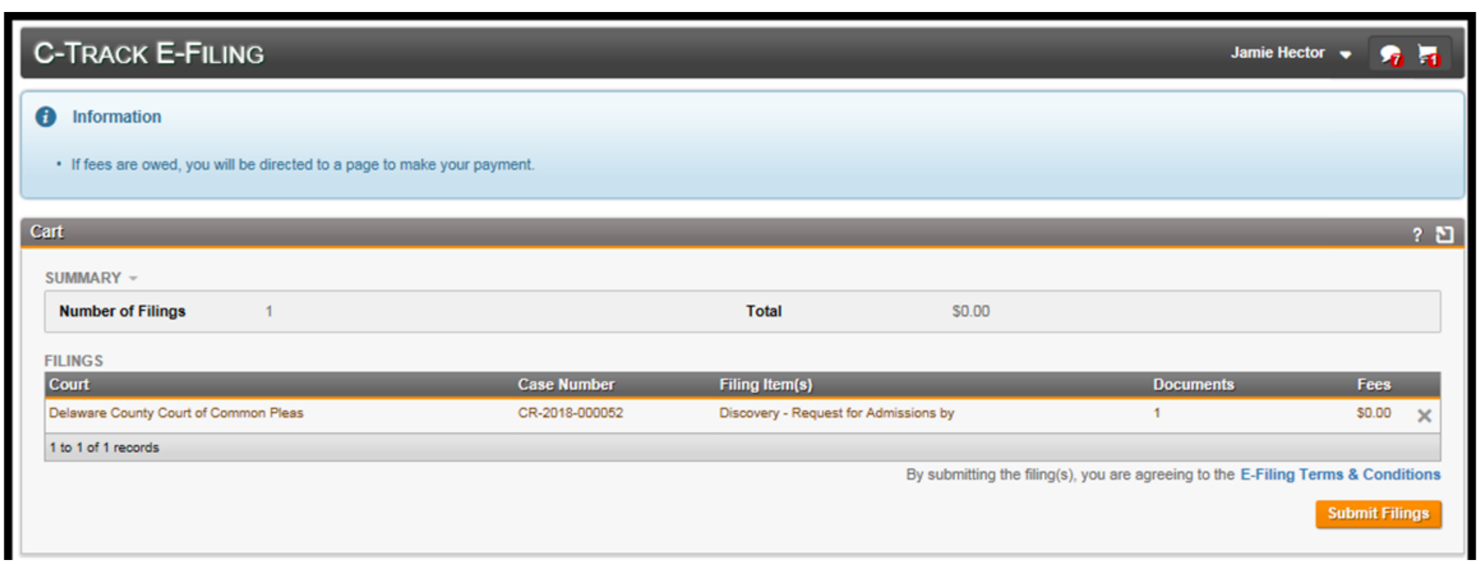


Fig. 1.92: Cart screen

18. 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.

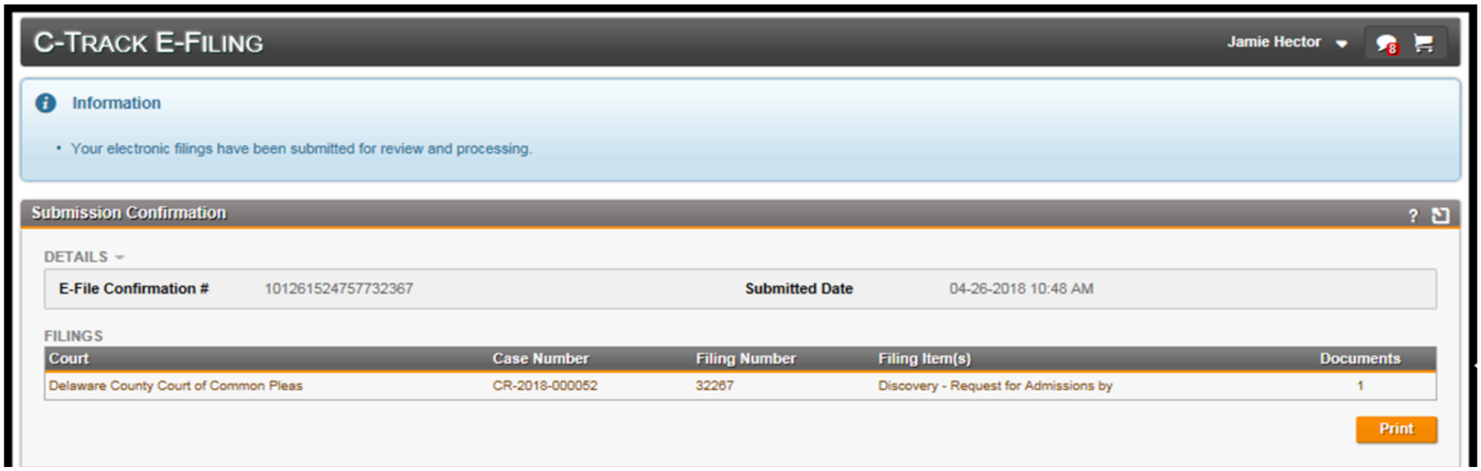


Fig. 1.93: Submission Confirmation screen

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 Court 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, your Court may send an email to the email address associated to your user account.

Once the Court 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.

1.9 Support Staff Completes a Draft Filing

When you associate another member of your Legal Organization to your E-File Account, and make them an Authorized E-Filer, you allow them access to all filings available through your Filings menu, including filings in Draft status. Support staff do not need to have Matters shared with them to access filings when they use the **Switch Association** functionality to establish the association. By associating support staff, you create a proxy relationship where the support staff acts on your behalf to submit filings and complete filings in Draft status. Remember, Support Staff that you want to associate to your E-File account must also be authorized E-Filers.

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 an attorney associates their E-File account to the attorney and completes a filing from Draft status.

1. Select the down chevron to the right of your User name in the top banner navigation.

The **User Account** options appear.

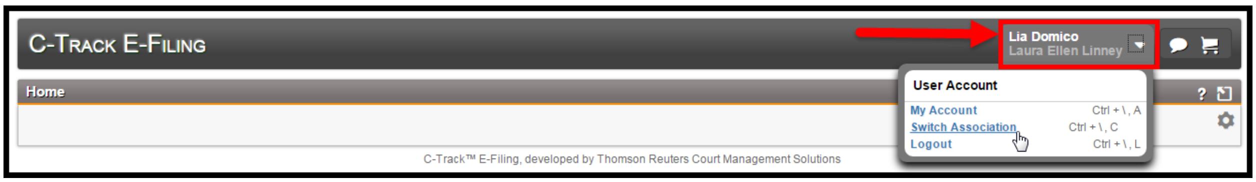


Fig. 1.94: User Account options exposed

> ➢ **NOTE**: In addition to clicking the link in the **User Account** menu, the **Select Authoring E-File User** window can be accessed through the keyboard shortcut:
>
> **Switch Association** **Ctrl + \ , C**

2. Select the **Switch Association** link.

The **Select Authorizing E-File User** window appears.

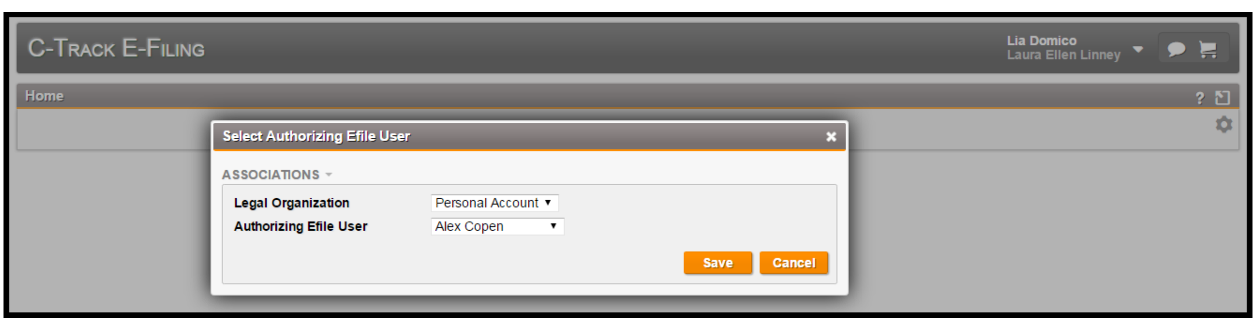


Fig. 1.95: Select Authorizing E-File User window

3. From the **Legal Organization** drop down, select your organization.
4. From the **Authorizing E-File User** drop down, select the E-Filer for whom you will be filing. Note this user is authorized to file on behalf of two users.

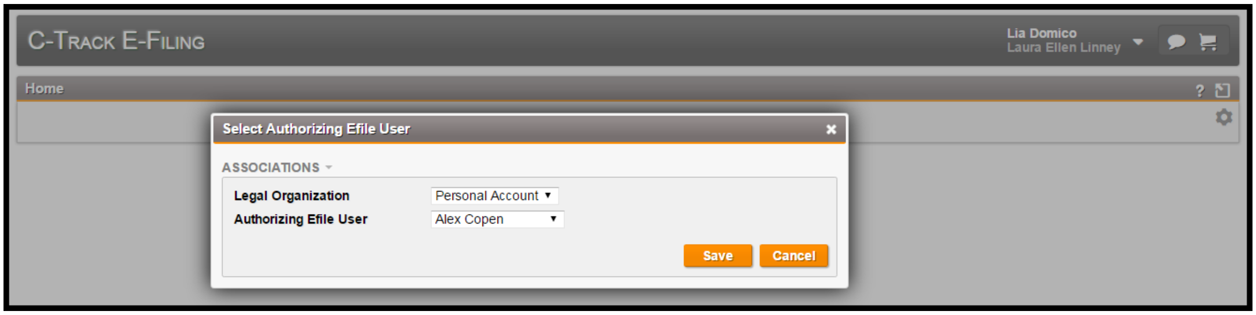


Fig. 1.96: Legal Organization and **Authorizing E-Filer** updated

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.

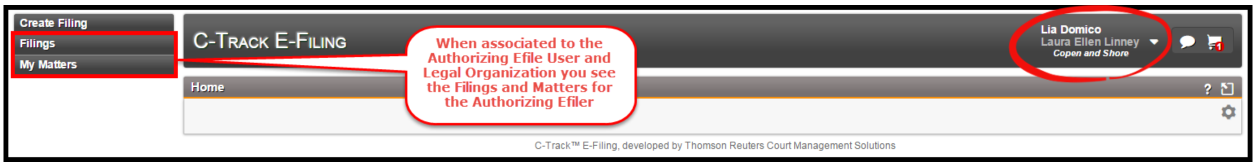


Fig. 1.97: Home screen with **Authorizing E-Filer** functionality

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.

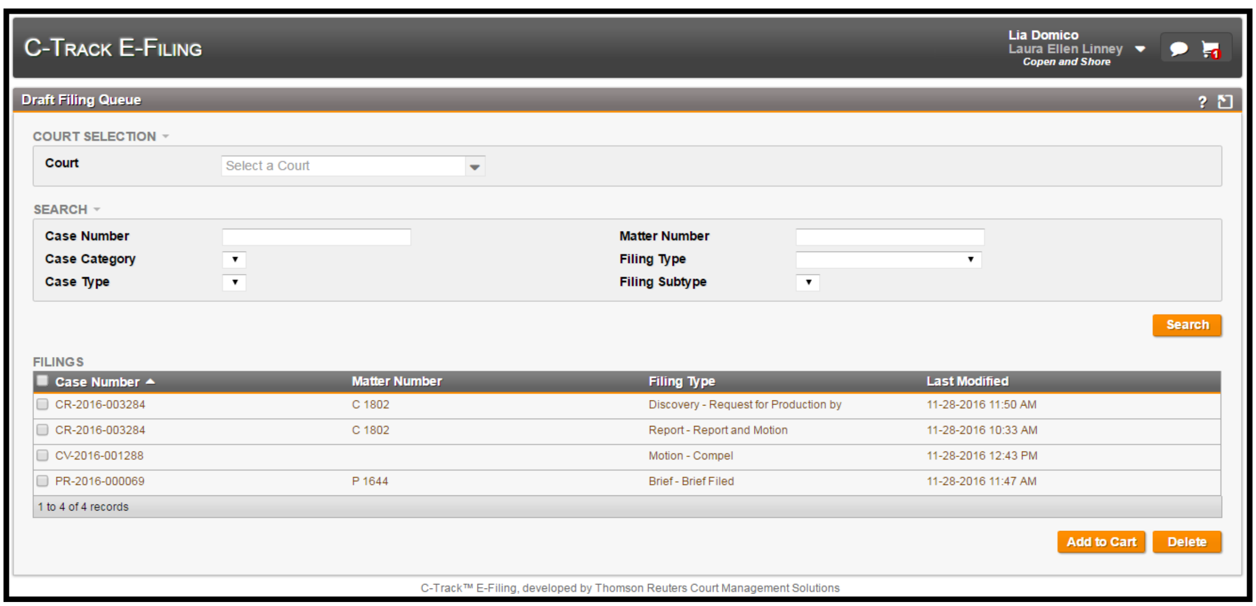


Fig. 1.98: Draft Filing Queue screen

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**, **Matter Number**, **Case Category**, **Filing Type**, and **Filing Subtype** upon which you can search. The **Matter Number** is a configurable number and can be used by Legal Organizations and filers from legal organizations as an internal identifier. This lets Legal Organization filers with the proper security permission view filings by other members of the Legal Organization.

The **Filings** display table show 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 **Matter Number**, **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 **Matter Number**, **Filing Type** and **Last Modified** columns can be selected to navigate to the **Filing Summary** screen.

7. Select the **Matter Number** for the top line item in the **Filings** display table.

The **Filing Summary** screen for the selected filing appears.

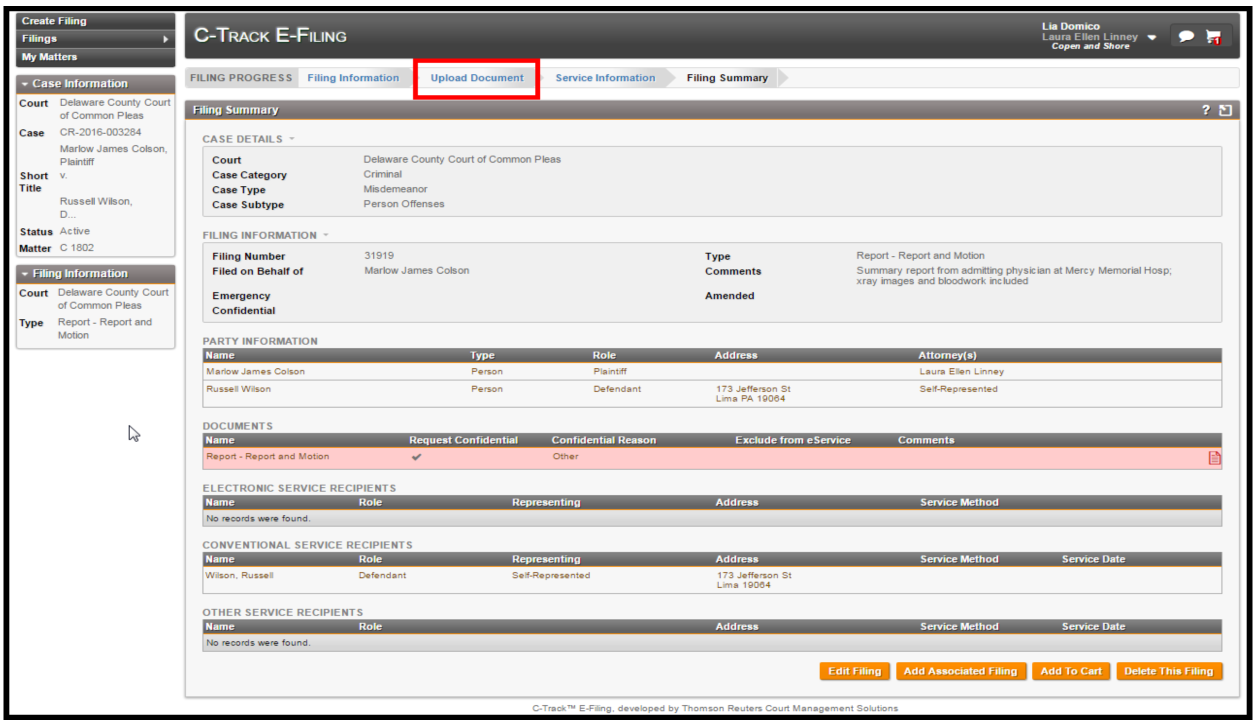


Fig. 1.99: Filing Summary screen

8. Click the **Upload Document** tab above the screen title bar to navigate to the **Upload Document** screen.

The **Upload Document** screen appears.

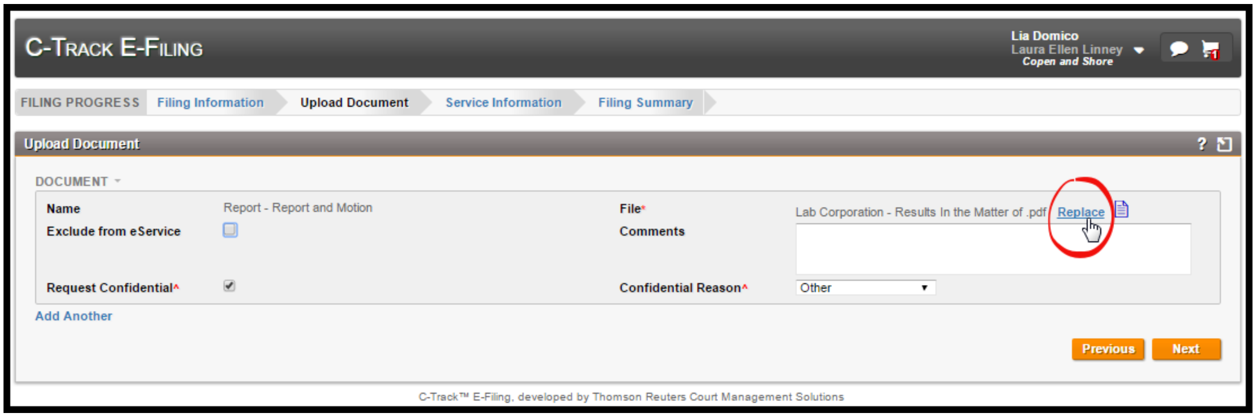


Fig. 1.100: Upload Document screen

9. Click the **Replace** link to the right of the previously uploaded file name.

The initial file is removed.

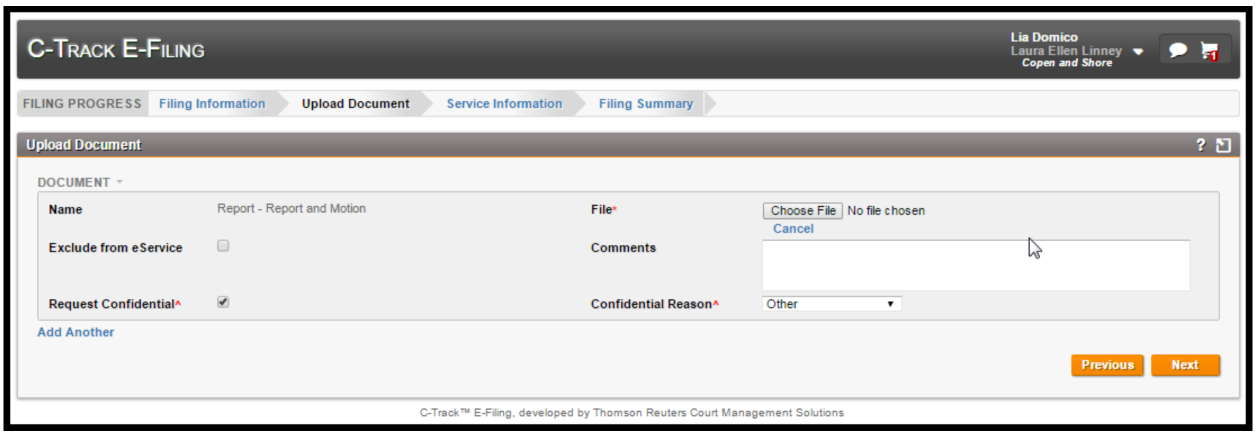


Fig. 1.101: Upload Document screen – file removed

> **NOTE**: A **Cancel** link appears below the **Choose File** button. If you remove an attached document by mistake, use the **Cancel** button to reattach the initial document.

10. Click **Choose File**.

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

11. Select the file you want to upload.
12. Click **Open**.

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

13. Click **Next**.

The **Service Information** screen appears.

14. Select **Service Method** for **Electronic Service** and **Conventional Service Recipients** if applicable.
15. Enter **Service Date** for **Conventional Service Recipients**.
16. Click **Next**.

The **Filing Summary** screen appears.

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

17. Click **Add to Cart**.

The **Cart** screen appears. Note the filing you selected appears along with another filing that was already in the **Cart** when you associated to the **Authorizing E-File User**. Additionally, 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.

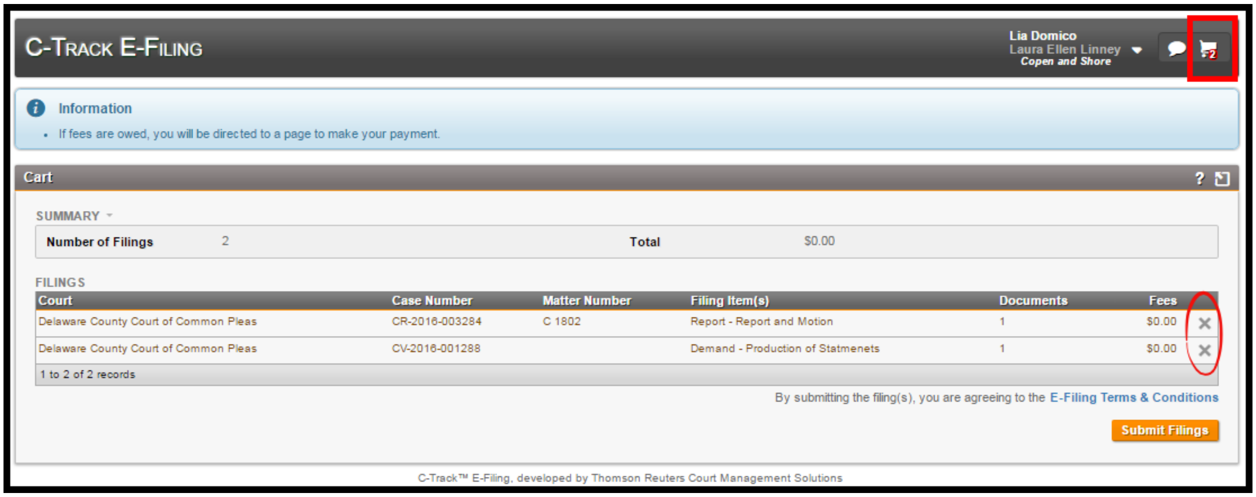


Fig. 1.102: Cart screen – filings ready for Submission

Here we remove the filing we did not select from the Draft Filing Queue screen.

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

A **Confirm** window appears.

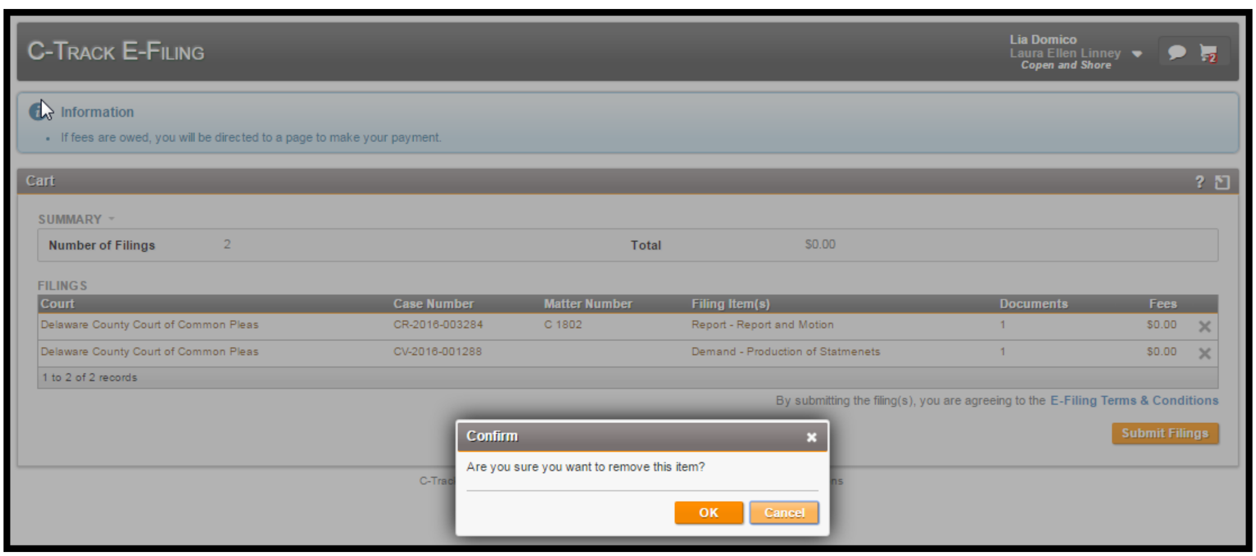


Fig. 1.103: Confirm window – Remove a filing from the Cart

19. Click **OK**.

The single filing appears and the **Cart** icon is updated to show a single filing.

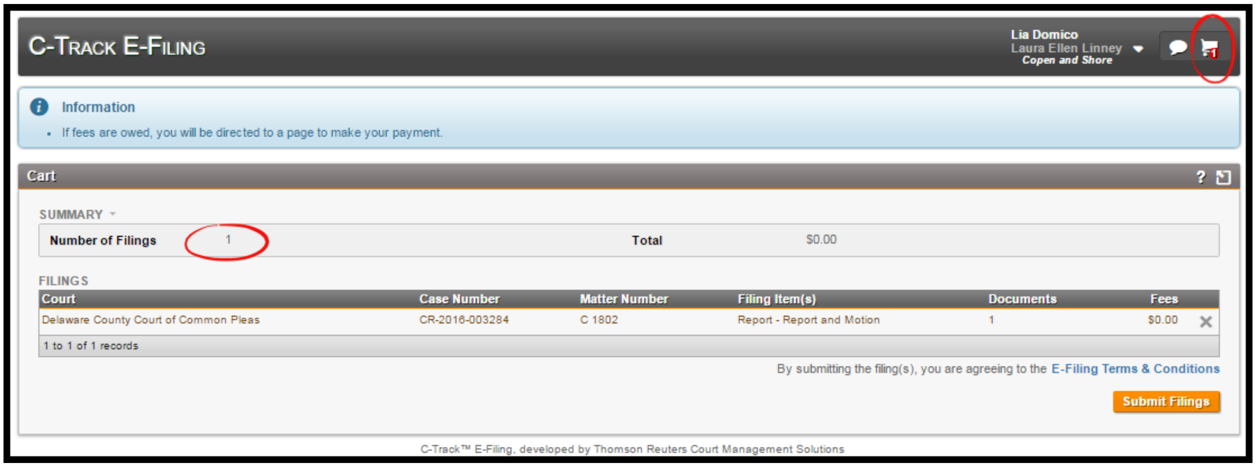


Fig. 1.104: Cart screen – single filing

20. Click **Submit Filings**.

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

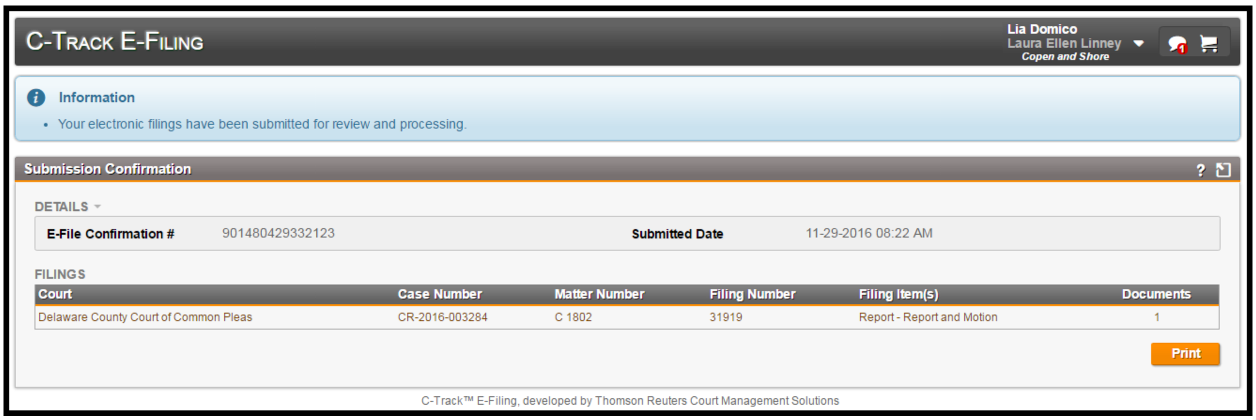


Fig. 1.105: Submission Confirmation screen – Successful submission

You have successfully replaced a filing document, removed a filing from the **Cart** and 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.

1.10 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, a Non-E-Filer adds a registered E-Filer to a Legal Organization. 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.

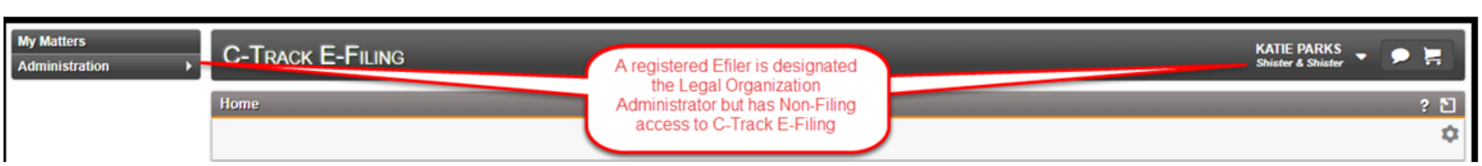


Fig. 1.106: Non-Filing Legal Organization Administrator Home screen – Menu for Non-Filer

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

The **Legal Organization Search** screen appears.

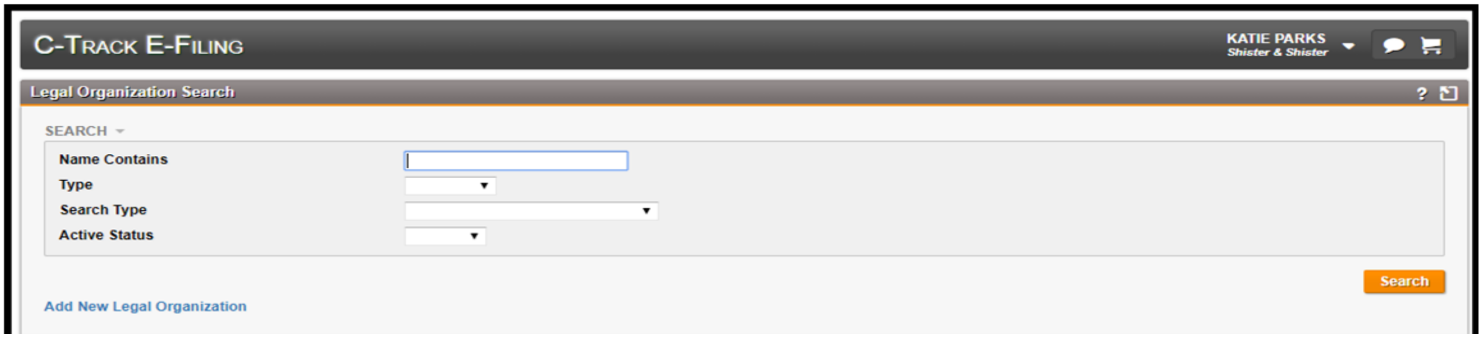


Fig. 1.107: Legal Organization Search screen

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.

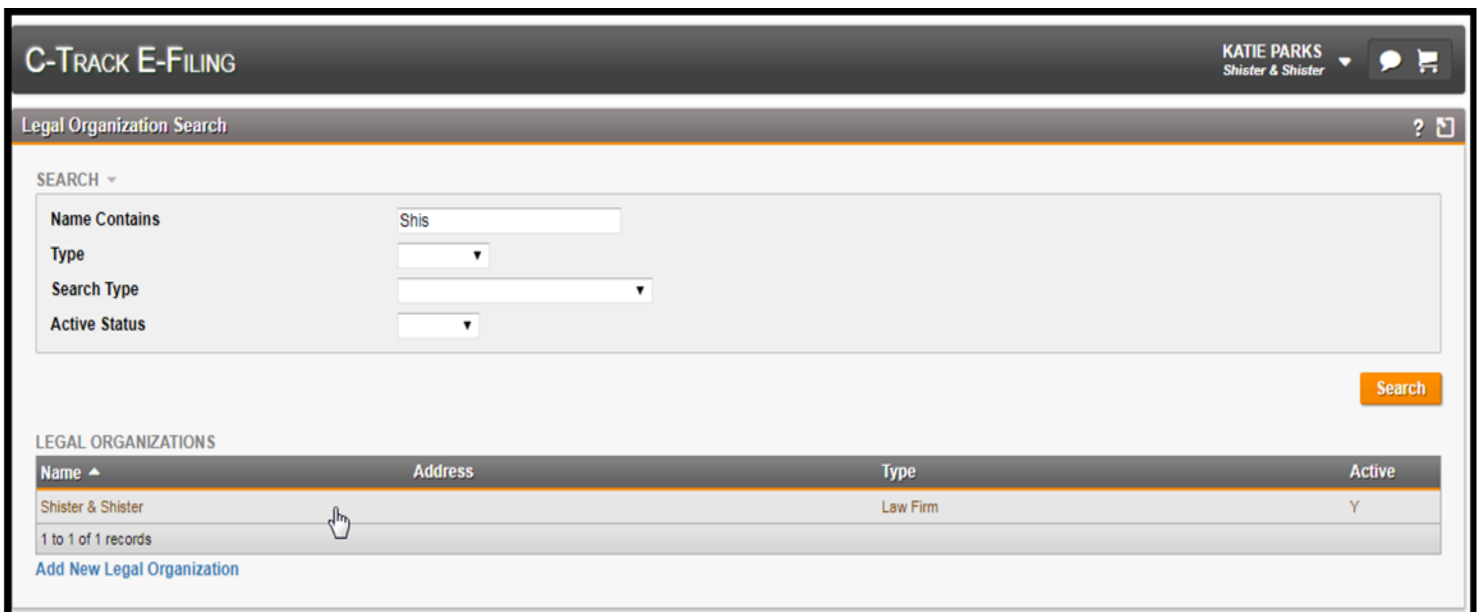


Fig. 1.108: Legal Organization Search screen - **Legal Organizations** display table

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

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.

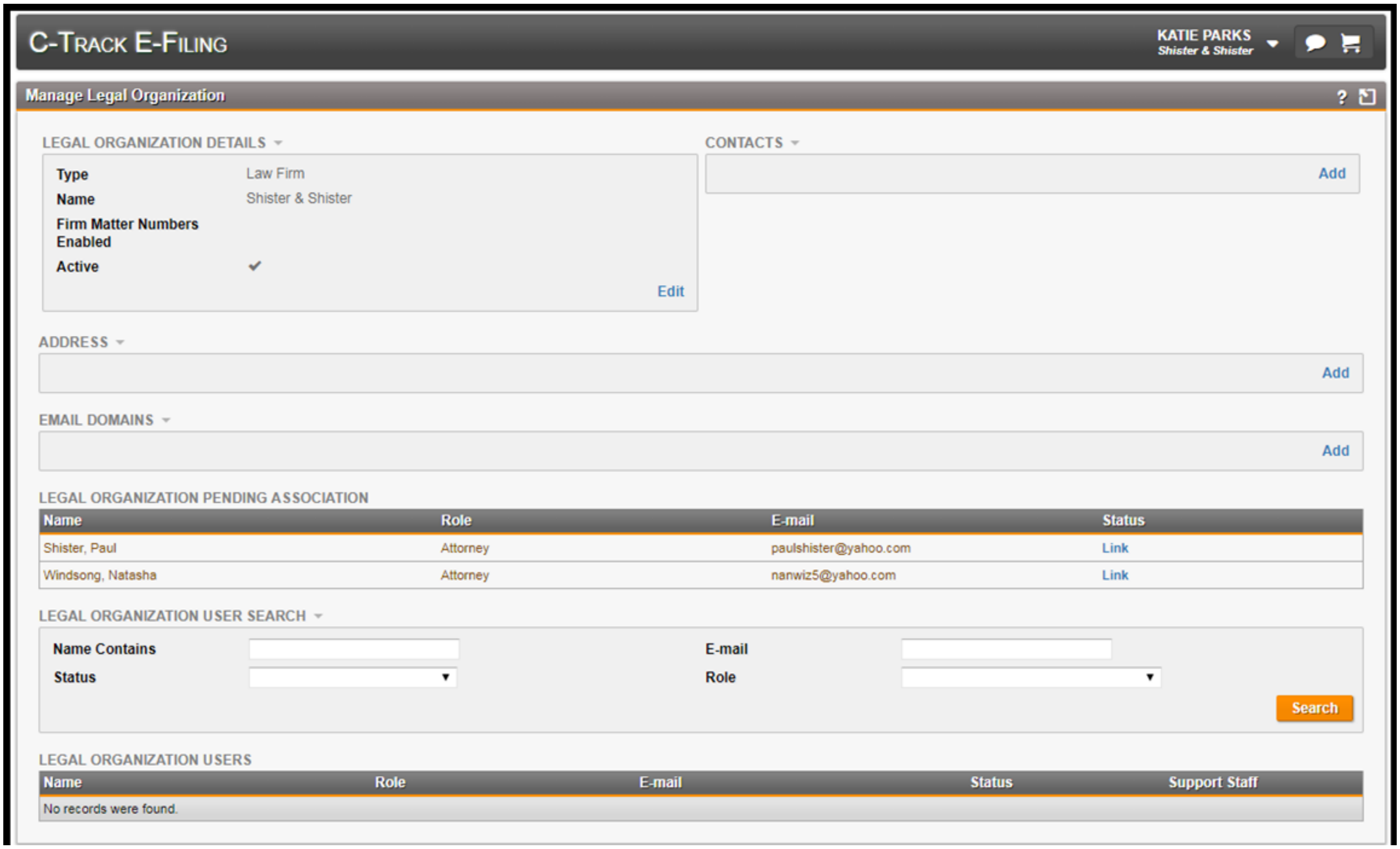


Fig. 1.109: Manage Legal Organization screen

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**. Additionally, this container lets a Legal Organization use Matter Numbers functionality to share electronic filing permission.

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.

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 create the

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

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.

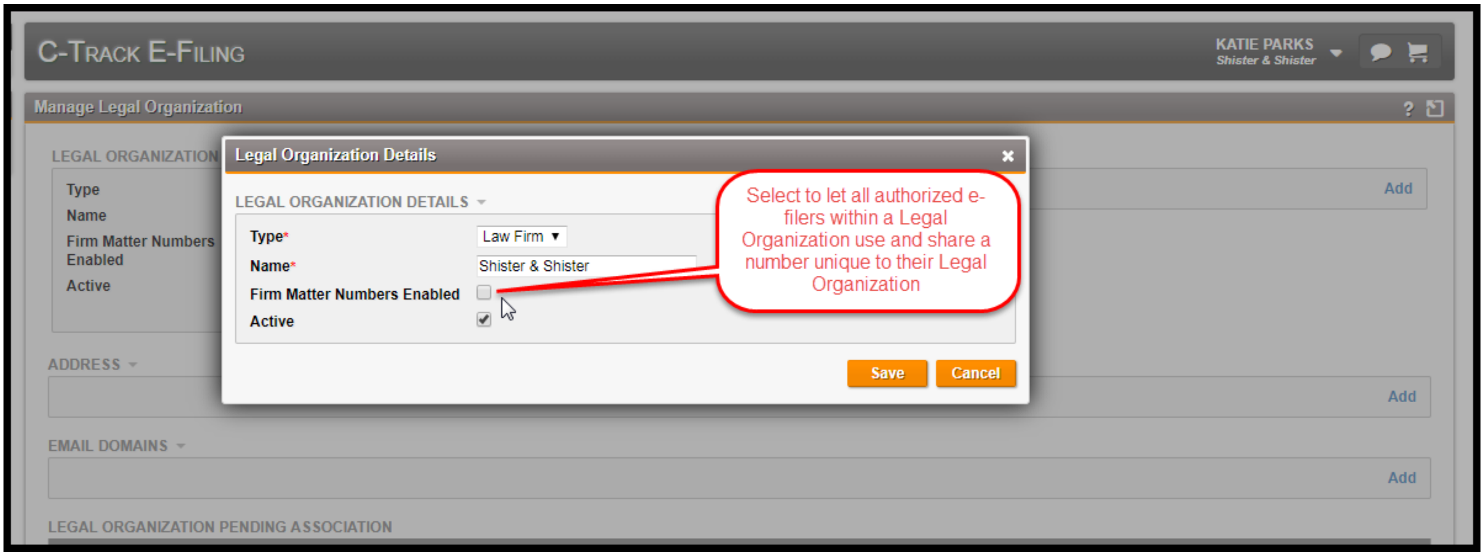


Fig. 1.110: Legal Organization Details window

6. Select the **Firm Matter Numbers Enabled** check box.
7. Click **Save**.

You return to the **Manage Legal Organization** screen. **Matter Numbers Enabled** check box displays in the **Legal Organization Details** container.

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.

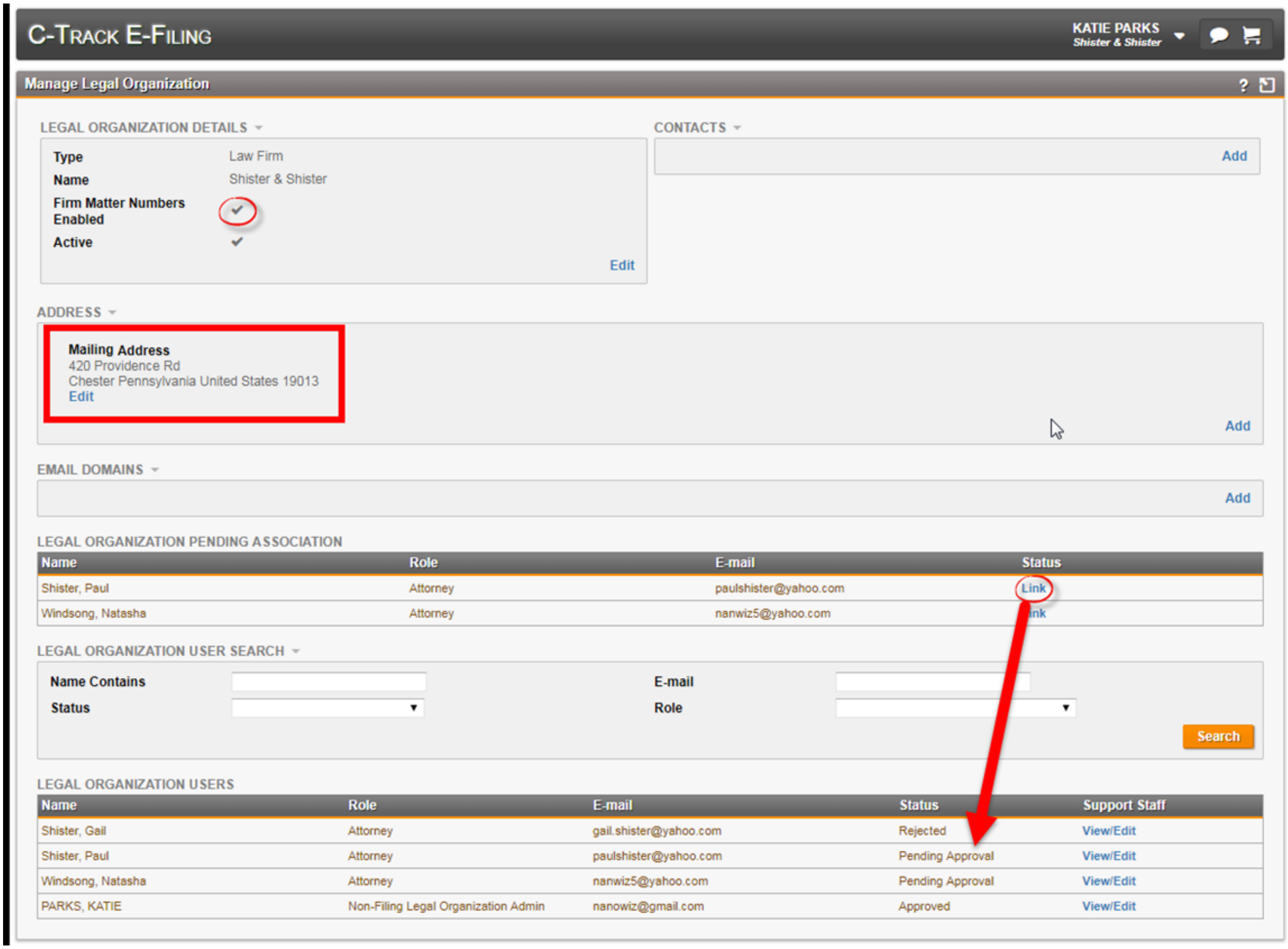


Fig. 1.111: Manage Legal Organization screen - **Legal Organization Users** searched

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

The **User – Legal Organization Details** window appears.

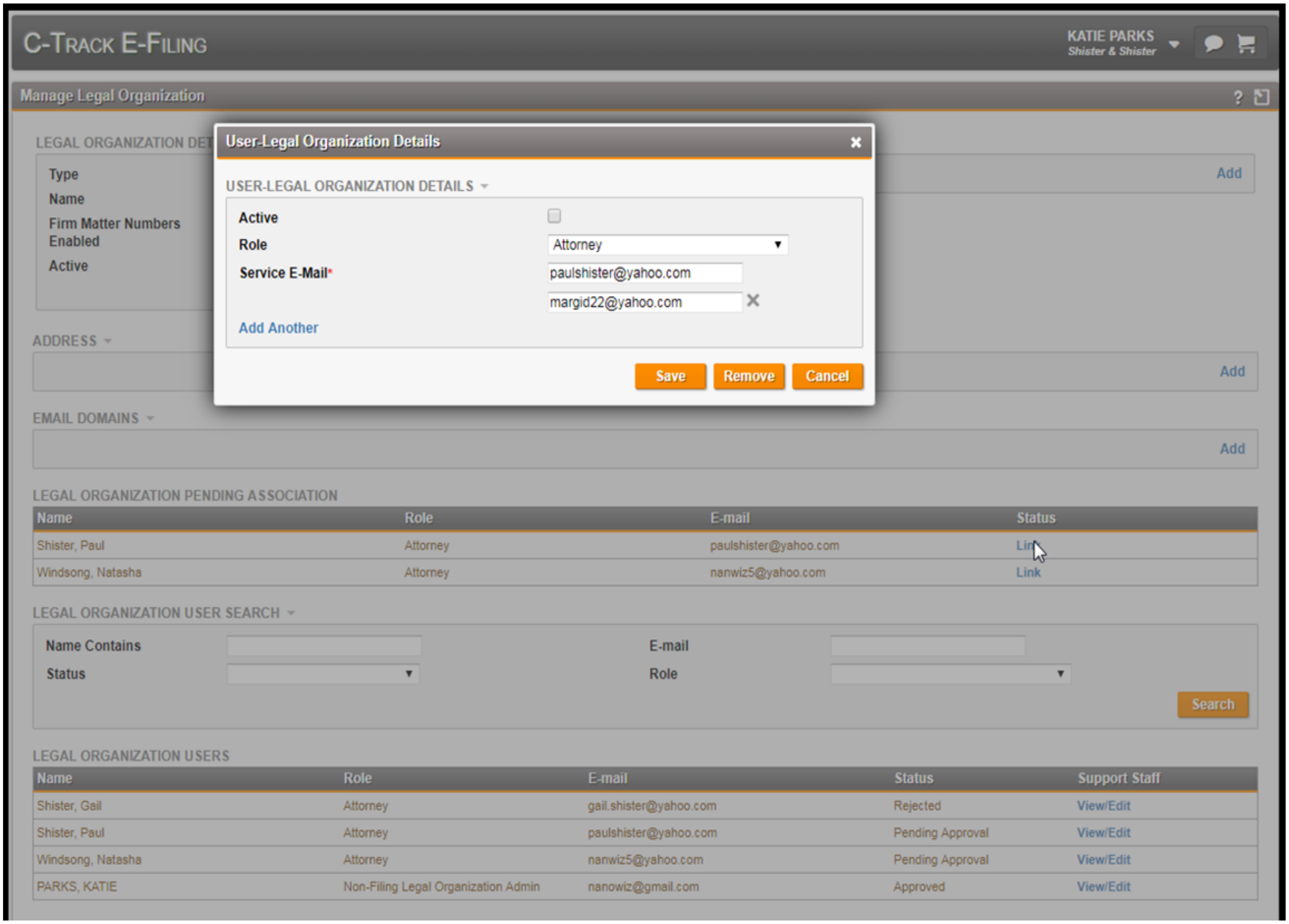


Fig. 1.112: User – Legal Organization Details window

The **User – Legal Organization Details** container provides an editable summary of the users **Role**, and **Service Email** 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, when Matter Numbers are enabled.

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.

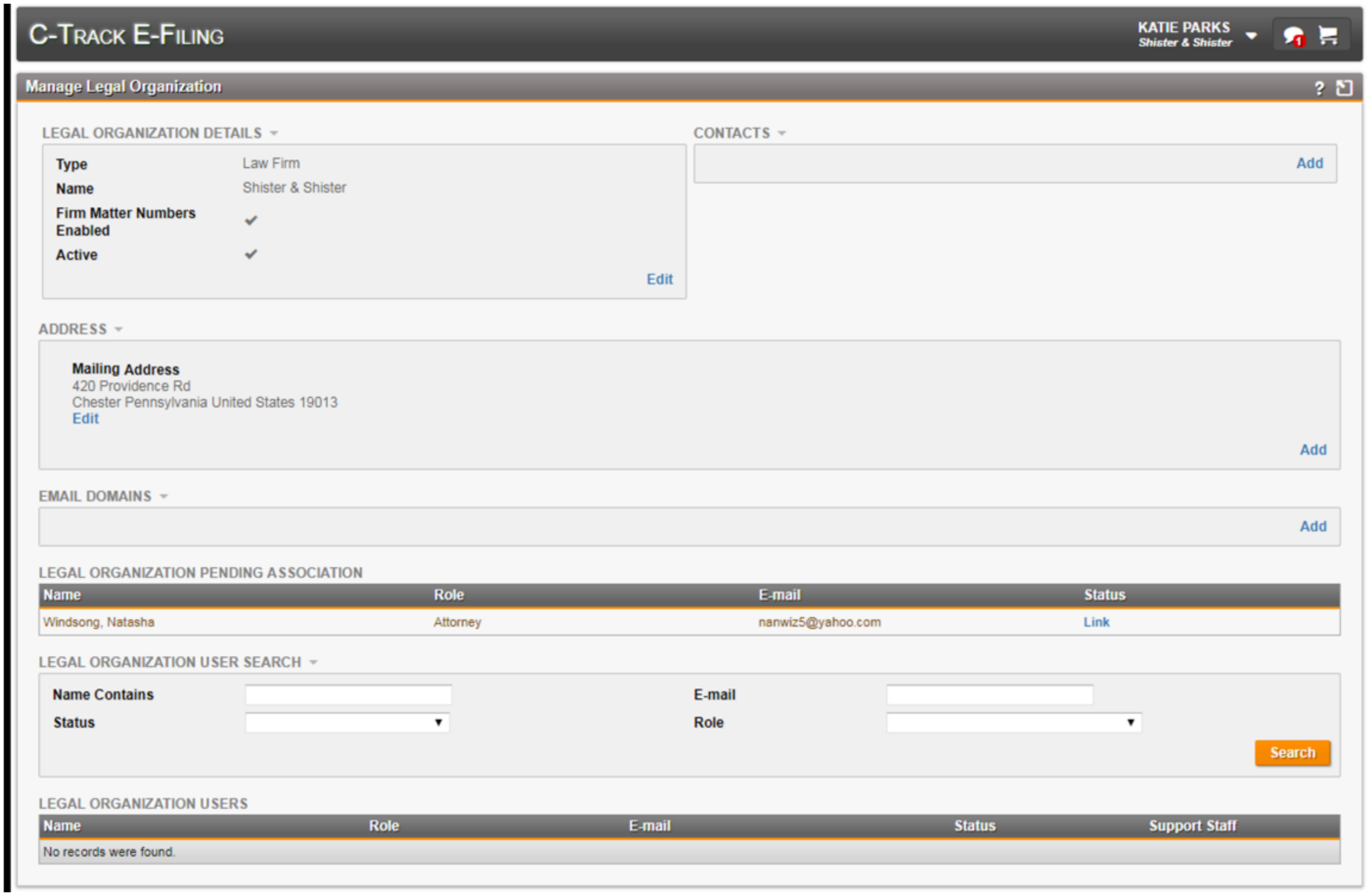


Fig. 1.113: Manage Legal Organization screen

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

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

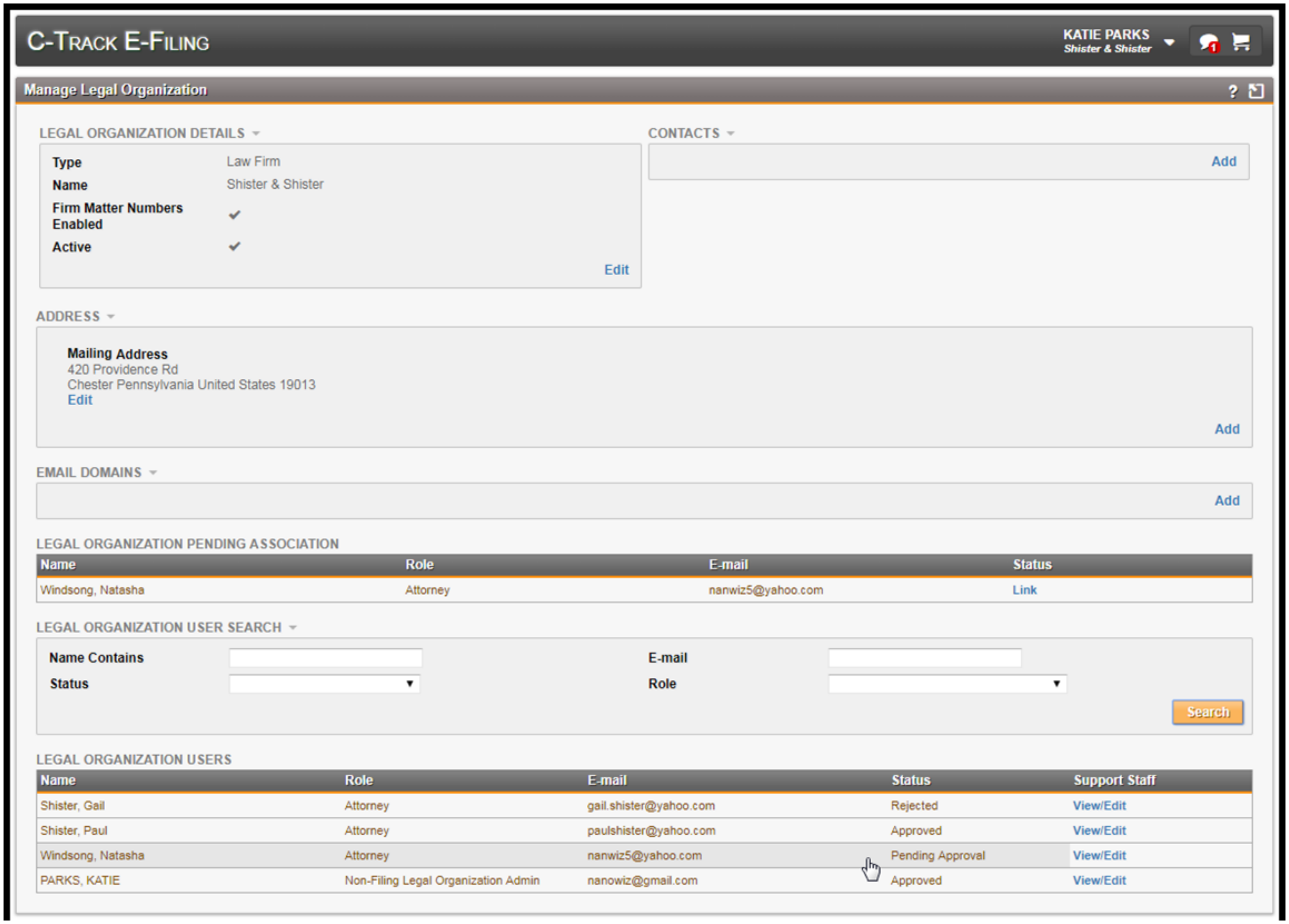


Fig. 1.114: Manage Legal Organization screen

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.

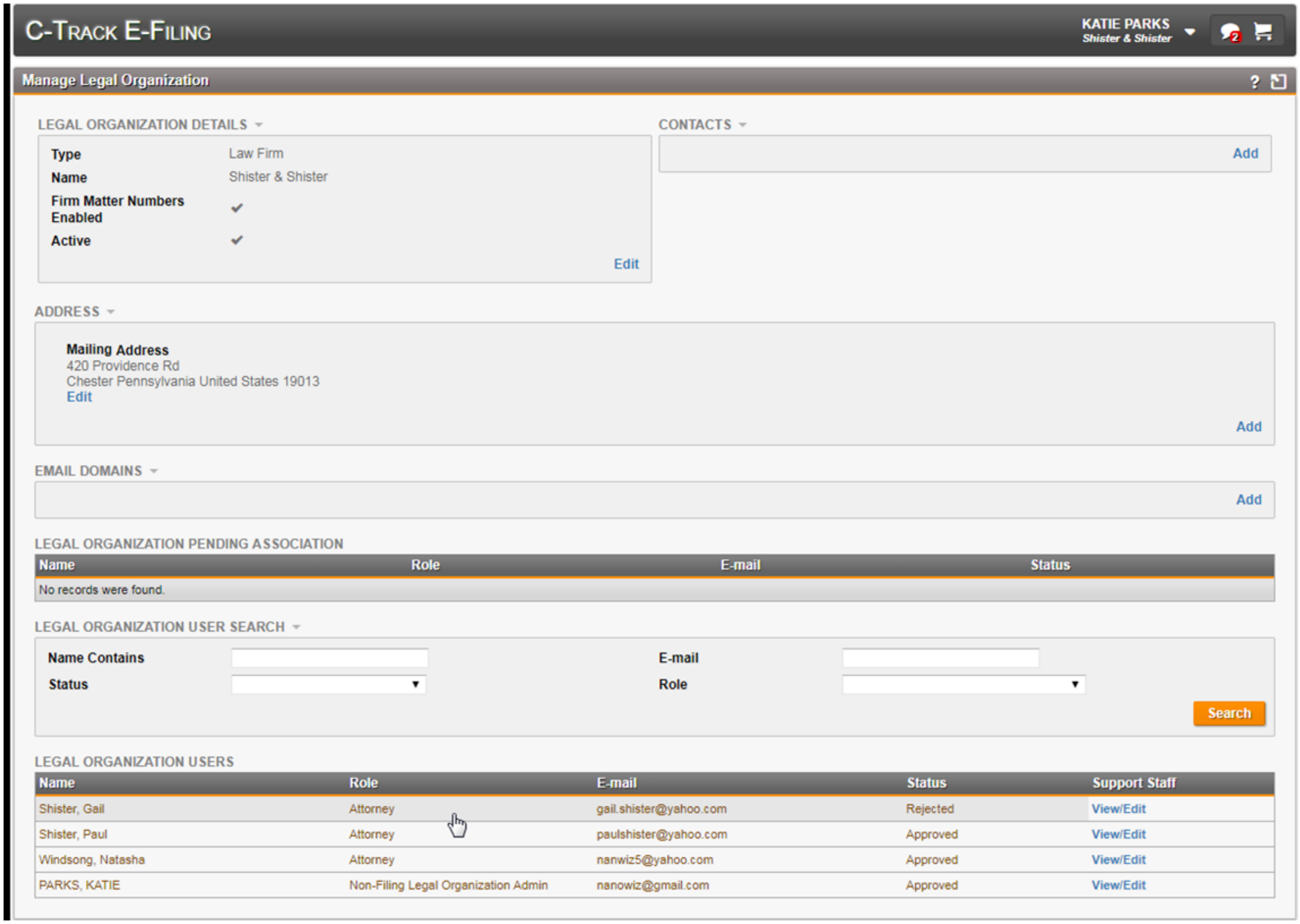


Fig. 1.115: Manage Legal Organization screen

16. Select the **User** with a **Status** of Rejected from the **Legal Organization User** display table.

The **User – Legal Organization Details** window appears.

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

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

19. Click **Search** in the **Legal Organization User Search** container.

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

The **Authorized Support Staff** window appears.

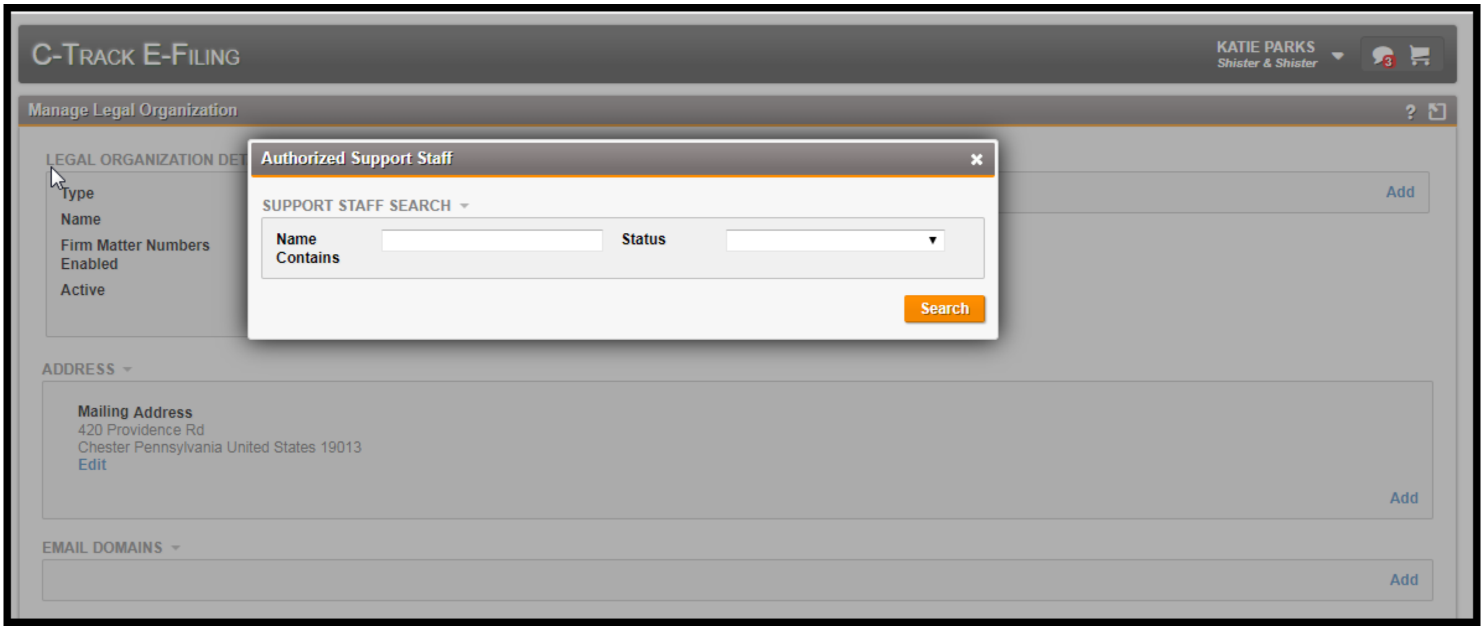


Fig. 1.116: Authorized Support Staff window

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

21. Click **Search**.

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

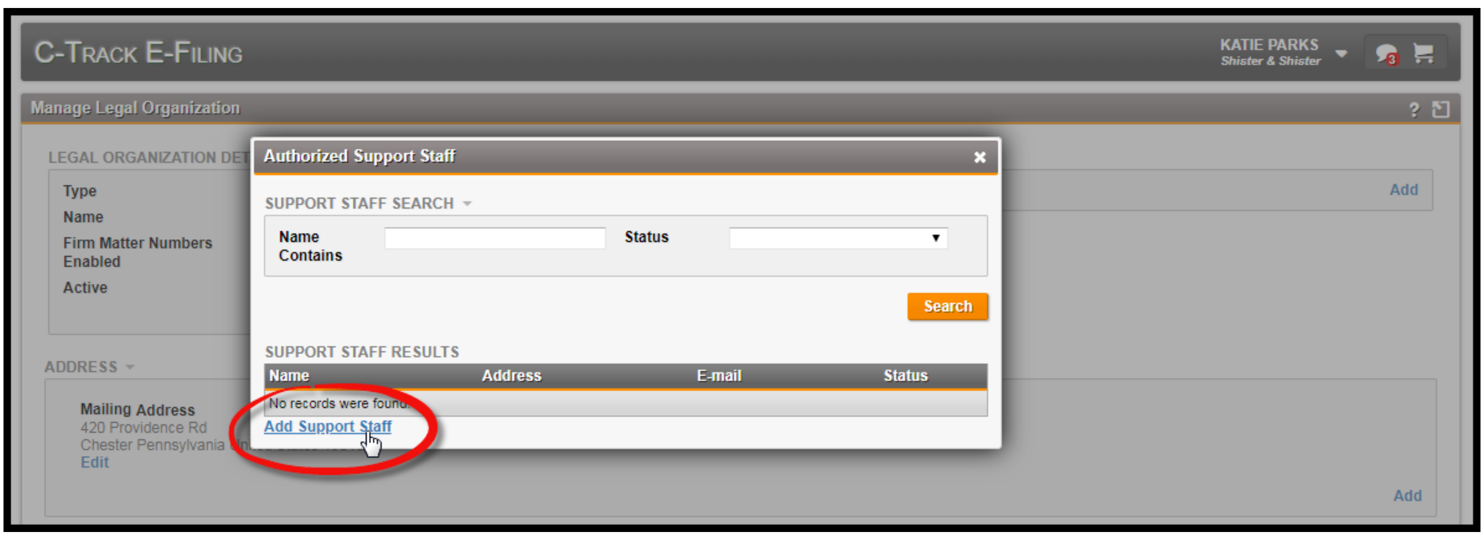


Fig. 1.117: Support Staff Results display table - **Add Support Staff** link

22. Click the **Add Support Staff** link.

The **Add Support Staff** window appears.

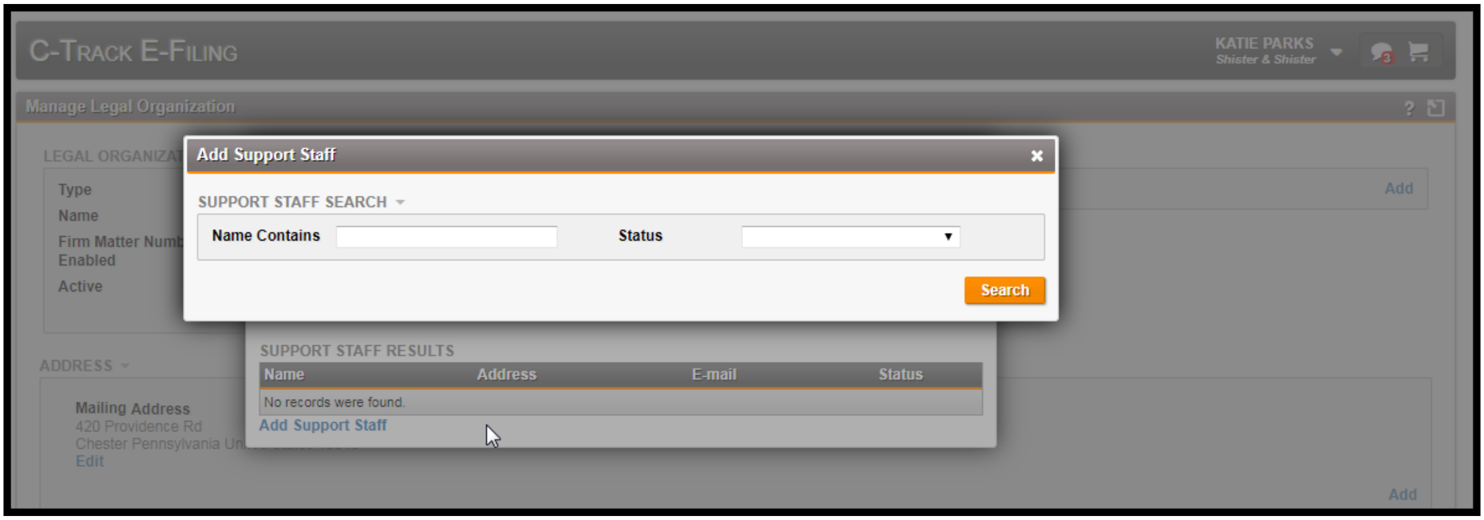


Fig. 1.118 Add Support Staff window

23. Click **Search**.

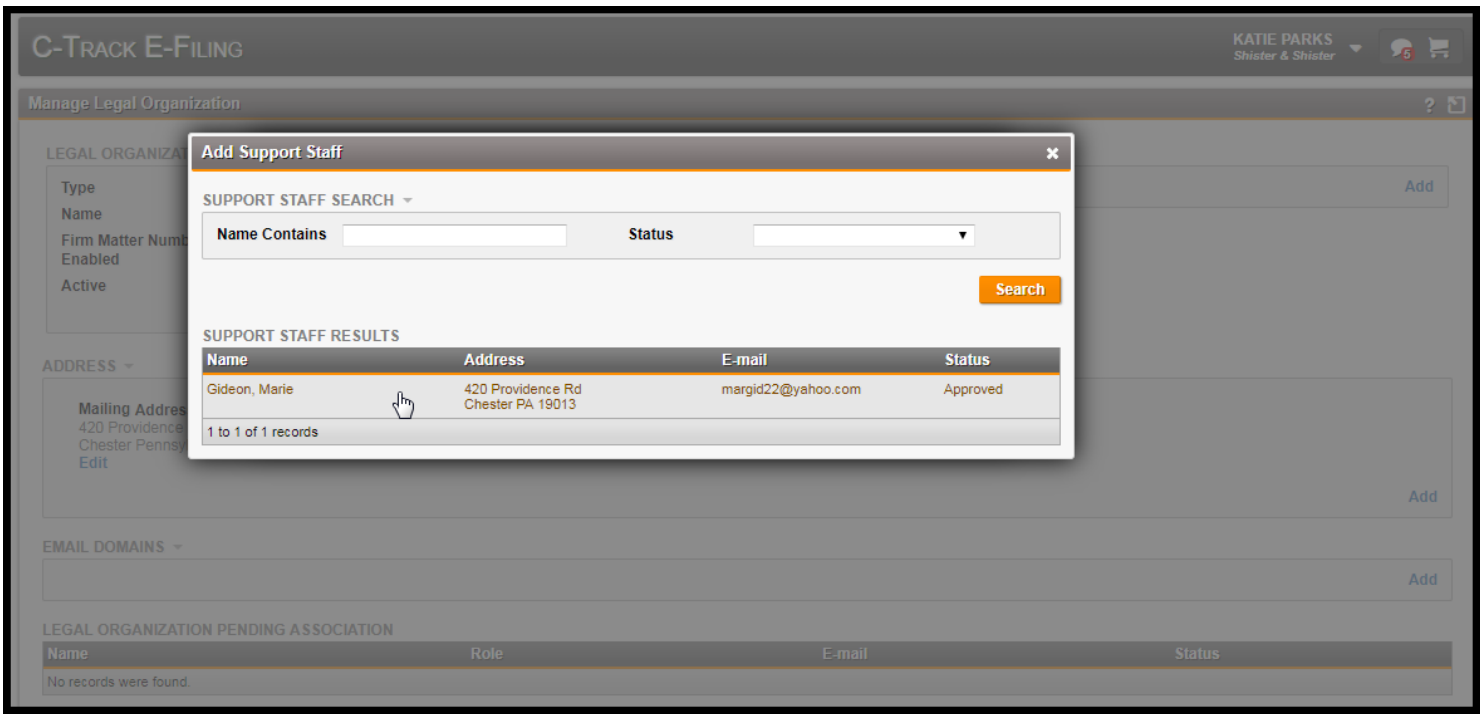


Fig. 1.119: Add Support Staff results

24. Select the line item for the staff member you want to associate to your User Account.

You return to the **Authorized Support Staff** window. The staff members' information appears in the **Support Staff Results** display table.

25. Click **X** to return to the **Manage Associated Legal Organization** screen.

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