Lehigh County

Lehigh County Government Center | 17 South 7th Street | Allentown, PA 18101 | www.lehighcounty.org

Electronic Filing Instructions – Lehigh County

System Registration:
To access the electronic filing system, open an internet browser and go to https://pennsylvania.tylertech.cloud/ofsweb. This version of the site may be used on all browsers and mobile devices. The home page will display. Under Court Information, notifications regarding system maintenance alerts and upgrades will be present, along with pertinent filing information.

Under **Self Help** you will find filing, registration, and firm admin instructions, OFS Guidelines for Civil and for Family, FAQ's, Terms and Conditions, Lehigh County efiling Rules, and also recorded webinar training sessions.

Contact information is provided on the home page under **Self Help**. For account and technical assistance, please contact File & Serve support at 1-800-297-5377. For questions regarding Lehigh County Civil e-filing procedures, please contact the Clerk of Judicial Records – Civil Division via OFSCivilSupport@lehighcounty.org. For questions regarding Lehigh County Family e-filing procedure, please contact Family Court via OFSFamilySupport@lehighcounty.org. A courtesy copy of a filing may be sent to Court Administration via OFSCourtAdminCivil@lehighcounty.org.

Court Information

Effective January 1, 2020, except as specifically exempted by the Court, electronic filing will be mandatory in all new and pending Family Court case types. This does not include Protection from Abuse and Orphans' Court cases. Please review the OFS Family Guidelines on the home page of the File and Serve site.

When presenting a motion in Motions Court or on a Judge's Walk-in Motions day, whether it is an emergency or notice was given to the opposing side, the motion must first be e-filed along with a COMPLETED Notice of Presentation (Date, time, courtroom, and Judge) and a Proposed Order. The filing party shall bring a time-stamped copy of the motion and proposed order with them to Court. Once the Judge signs the order, it will then be e-filed by the Court.

Before filing electronically, users must register with the application. To do so, select "Register"

Enter your User Information. Fields outlined in red are required fields.

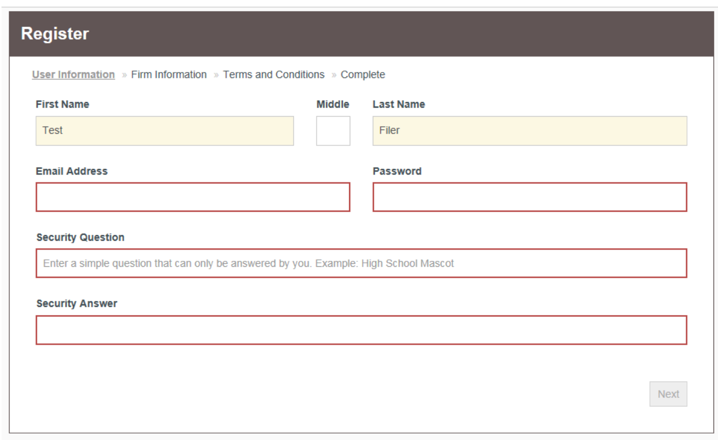
It is important to provide a valid email address. The application will send a verification email to this address. Users will then click the enclosed link in the verification message to activate the account. In addition, all filing notifications will be sent to this e-mail address.

Passwords have the following requirements:

- Passwords must be at least 8 characters in length
- Passwords must contain at least one uppercase and one lowercase letter
- Passwords must contain at least one number or symbol

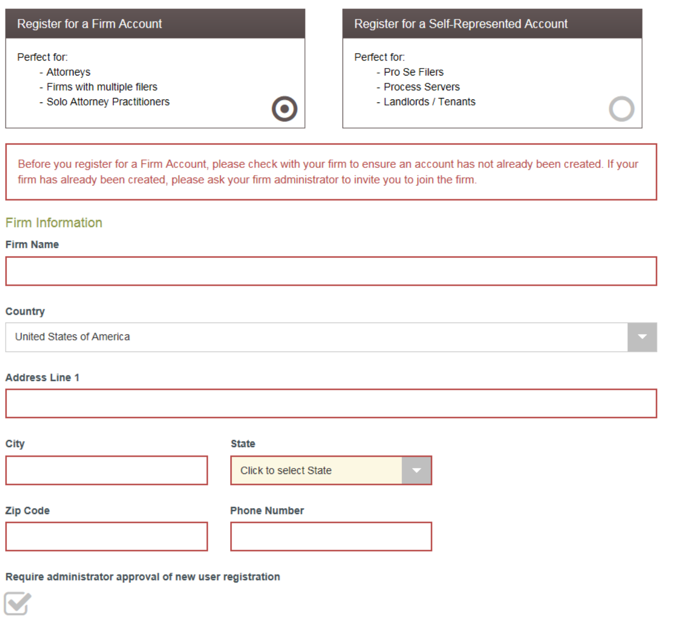
The security question and answer can be used to reset your password if it is forgotten.

Select "Next" when finished.



Choose to Register for a Firm Account. Enter your Firm Information. Sole practitioners should register as a Firm Account, as you will be able to link your attorney record. If your firm already has an account, please contact your firm administrator so that an invitation to join the firm may be sent to you. If you do not know your firm administrator, please contact File & Serve support at 1-800-297-5377 for assistance.

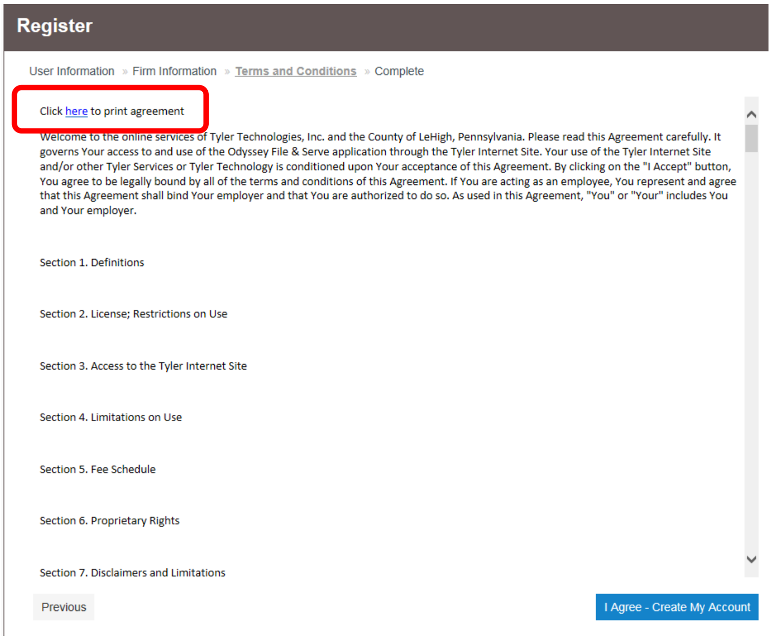
If you wish to approve new firm users after registration, enable the checkbox for firm administrator approval of new accounts. After inviting new users to your firm, a firm administrator will need to approve the accounts before they are eligible to e-file.



Review the Terms and Conditions, and select “I Agree – Create My Account” to complete registration. A PDF version of the Terms and Conditions may be printed at this time. The Terms and Conditions are always available from the home page of File & Serve.

A registration e-mail will be sent after the account is created. Once the registration email is received, users only need to click on the link provided in the message to activate the account. A webpage will display confirming the account registration. At this time, users can return to the login screen to access the system by providing the email address and password entered during registration.

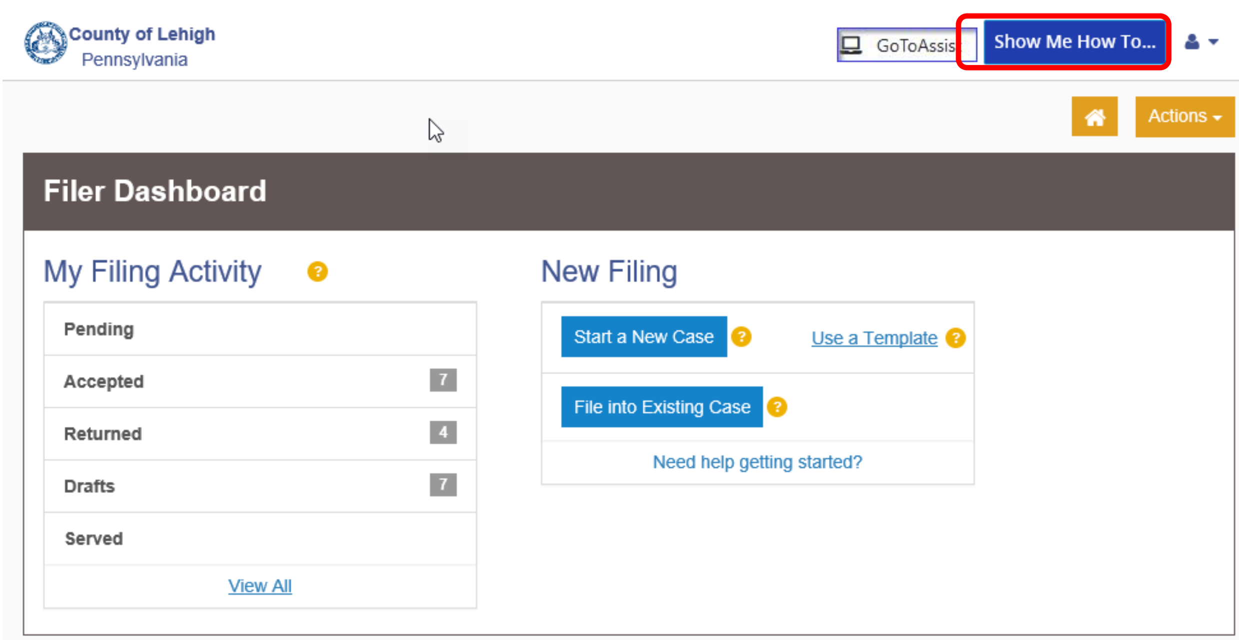
If the registration e-mail is not received, or if you encounter issues accessing the site after registration, please contact File & Serve support at 1-800-297-5377.



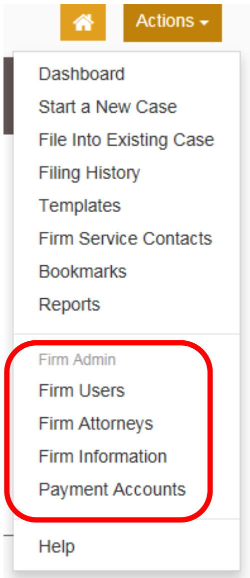
Firm Administration

After logging in, the application will display the Filer Dashboard. The **Home** icon will return you to the Filer Dashboard at any time.

Selecting **Show Me How To** will allow you to enter a question or select from a list of common topics. Selecting a topic will begin a tutorial.

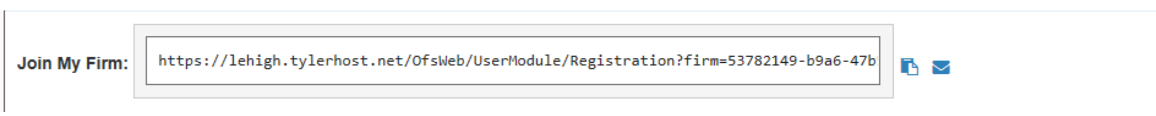


Prior to any filings, a firm administration will need to configure at least one payment account and at least one attorney. Select the orange Actions menu to access the Firm Admin options.



Firm administrators have the ability to approve new users, manage firm users, attorneys and service contacts, send invitations to join the firm, configure payment accounts and update firm information

Firm Users – Invitations to Join Firm

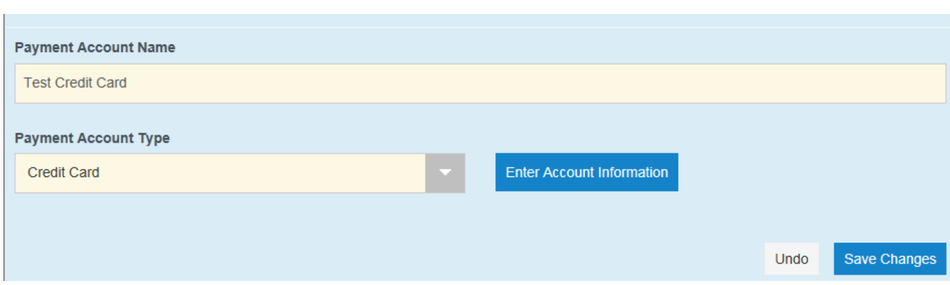


Payment Accounts

Payment accounts enable customary filing fees to be charged to the user.

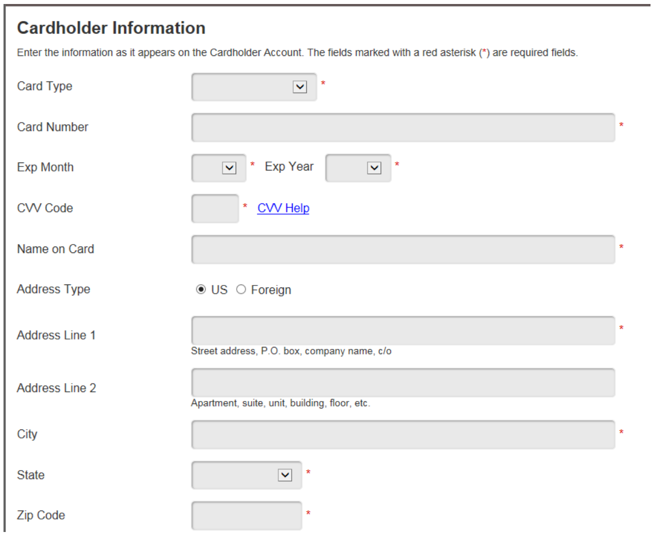
** A Payment Account ***must*** be set up prior to filing. The application prevents users from creating any filings without a payment account.

Click the button labeled "Add Payment Account"



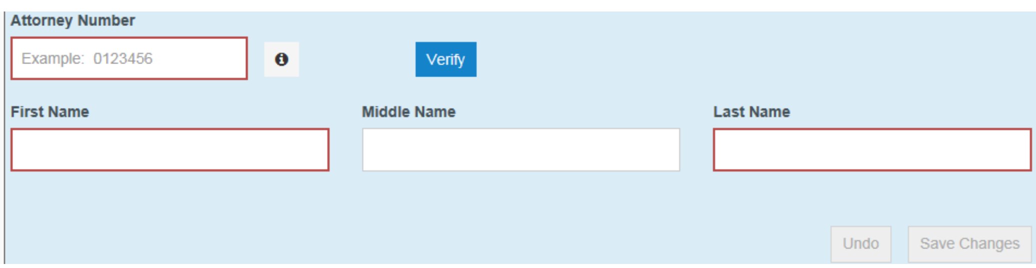
Enter a name for the account (i.e. "My Credit Card") and select Credit Card from the Payment Account Type drop down box.

Click the button "Enter Account Information".



Enter all of the Credit Card information and click "Continue":

Firm Attorneys



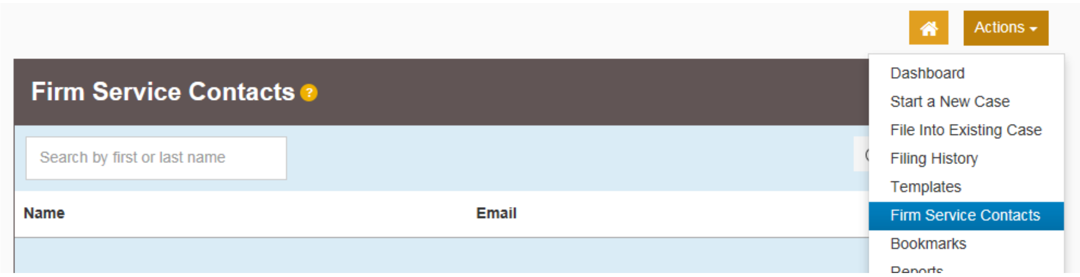
When entering a new attorney, please enter the bar number in a seven-digit format (example: 0123456). Select "Verify."

The bar number will be verified against the Clerk of Judicial Records' case management system. If your record is not returned, please send an e-mail to the Clerk of Judicial Records – Civil Division at OFSCivilSupport@lehighcounty.org with a subject line of **Bar Number Verification**. Include your name, address, phone number, and bar number. You will receive a return e-mail verifying that you may continue registration.

Firm Service Contacts

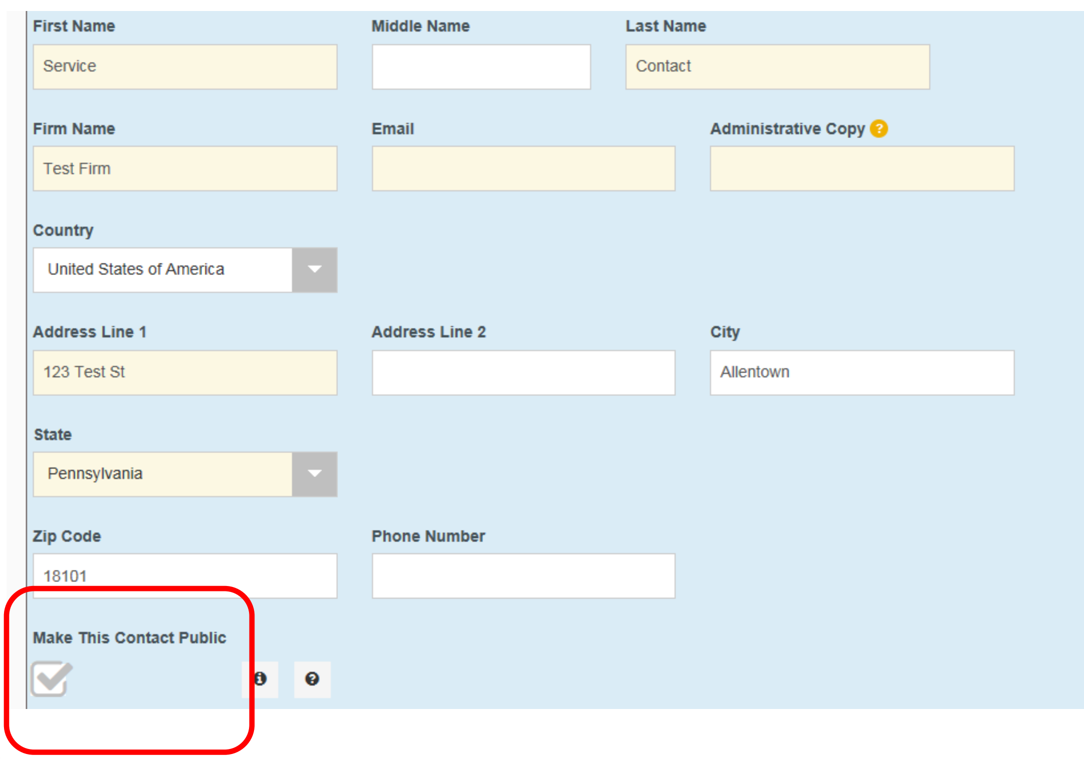
Service Contacts may be added to cases to receive electronic service of documents. NOTE: Service must be performed via EfileAndServe or Service Only options. Automatic service of documents is not performed. Service according to the rules of Civil procedure still applies to all filings. File & Serve only sends submission/acceptance/rejection notifications to the filer who submitted the documents. Any docketable filings may be viewed on the case through http://publicaccess.lehighcounty.org.

To maintain firm service contacts, choose "Firm Service Contacts" from the orange Actions menu.



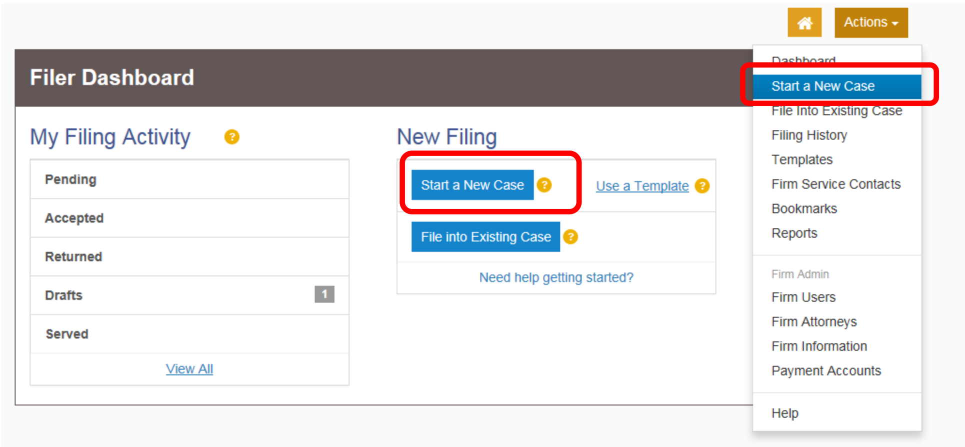
Select "Add Service Contact" to add a new contact. Fields outlined in red are required. Your firm name, address, and phone number will default from the previously entered firm information. This can be changed, if needed, for the service contact. The e-mail address entered will be the e-mail to which documents will be served. You may enter additional e-mail address(es) under "Administrative Copy" which can receive courtesy copies of the service. NOTE: Only service to service contacts is tracked.

If you wish to make this service contact public, enable the checkbox. This will allow other parties to be able to search for this service contact within File & Serve. If you do not wish to make this service contact public, deselect the checkbox. This service contact will now only be available within your firm.



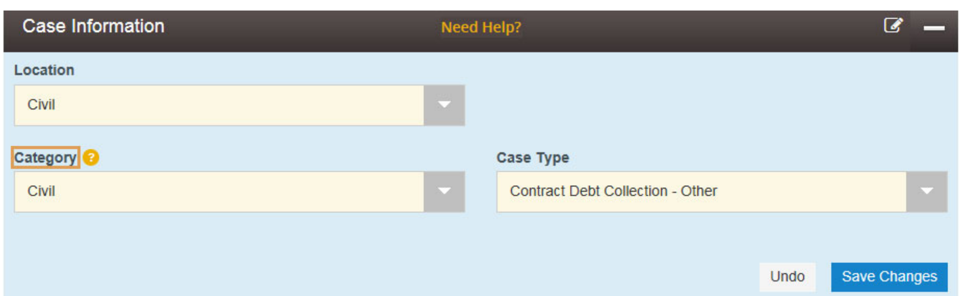
Submitting a New Case

Select "Start a New Case" from the Filer Dashboard, or under the orange "Actions" menu.



Case Information

Select a Location, Category, and Case Type. You may select the orange "Need Help" link for additional information in any section. For Civil filings, the case types available for selection match the Civil cover sheet. Selecting "Save Changes" will open up the Party Information.



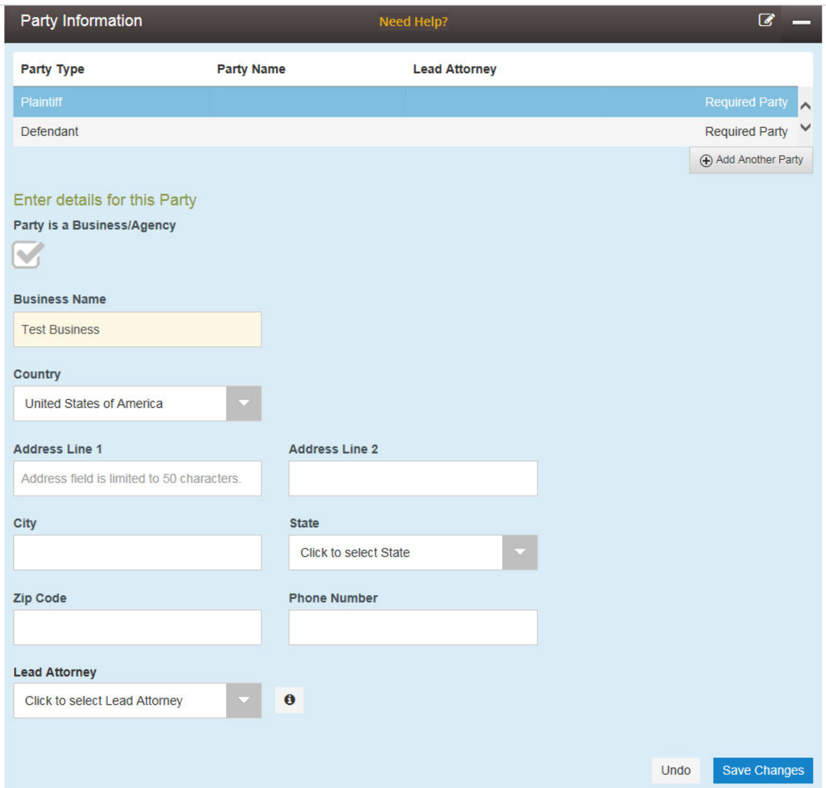
Party Information

At least one of each configured party types must be entered to proceed. If you have multiple parties for a type, for example – two Plaintiffs, you may select "Add Another Party" and choose the party type.

To enter information for the Parties, select the desired Party at the top of the screen and enter the information in the text boxes below. To switch from an individual person to a business, select the "Party is a Business/Agency" checkbox.

Required fields are outlined in red.

When finished with each party, select “Save Changes.” After entering at least one of each configured party type, the Filings section will open.



Filings

Filings is the area where users will upload documents for filing. For new cases, the Filing Type is limited to Efile. For subsequent filings, users may choose Efile & Serve.
Users will need to enter a description for the filing and upload the appropriate documents. All documents that are to be filed electronically shall be filed in Portable Document Format (PDF).

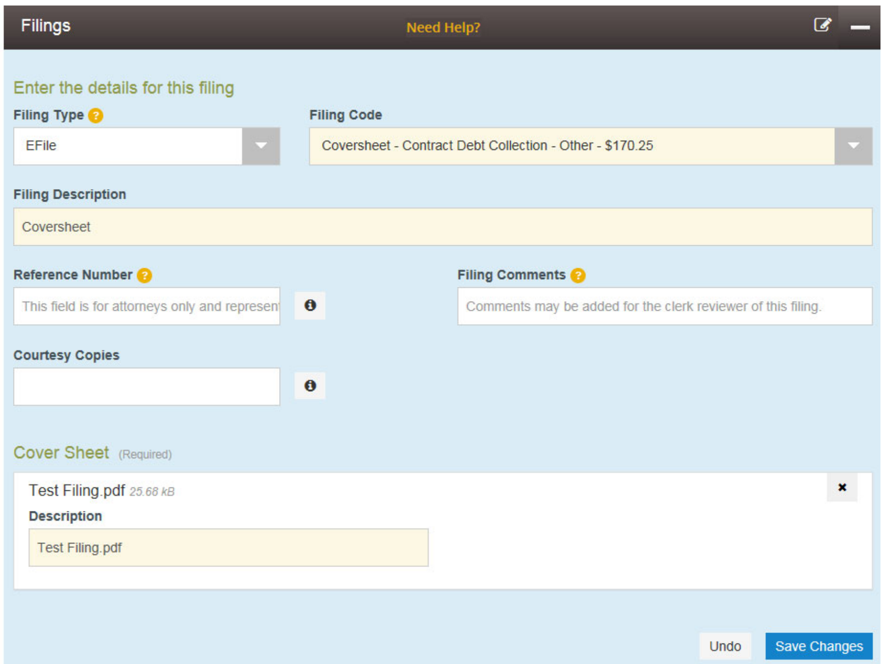
NOTE: When saving documents to submit through efiling, please refrain from using the listed special characters in the name of your file as these are known to cause issues with processing.

- < (less than)
- > (greater than)
- : (colon)
- " (double quote)
- / (forward slash)
- \ (backslash)
- | (vertical bar or pipe)
- ? (question mark)
- * (asterisk)

Reference Number is not a required field. It is available for user reference purpose only. The Filing Comments field may be used to enter a note for the Clerk of Judicial Records – Civil Division. Entering e-mail address(es) in the Courtesy Copies field will send a timestamped copy of the filing after it has been accepted to all addresses listed. NOTE: The Courtesy Copy is not service and is not tracked as service.

Adding the initial filing

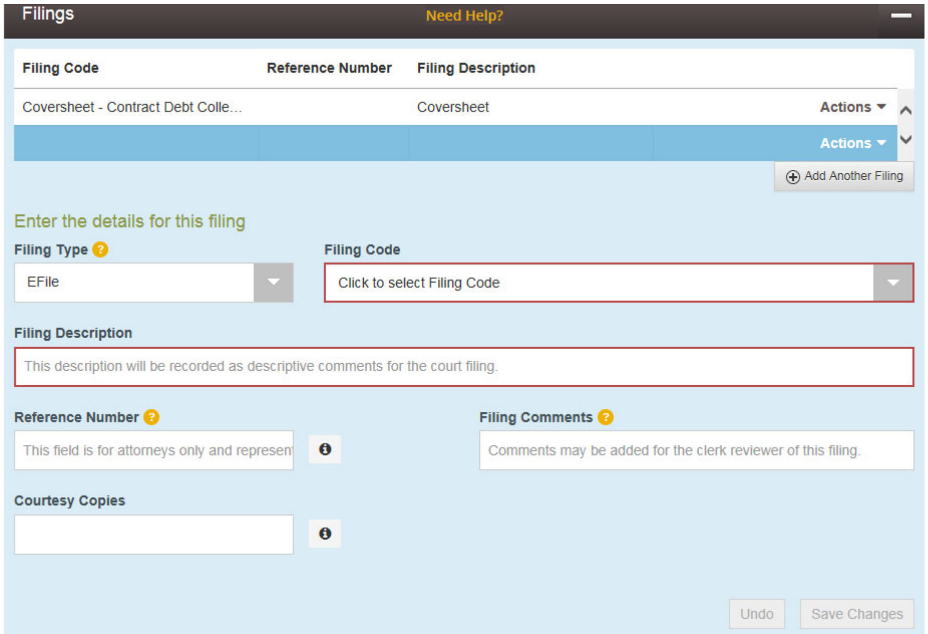
For Civil cases, please select the type of case as reflected on the Civil Coversheet. The initial case fees are linked to the coversheet code. For Family Court cases, please select the appropriate complaint code with the initial case fees. Select "Save Changes" to save this filing and to add a new filing.



Add Another Filing

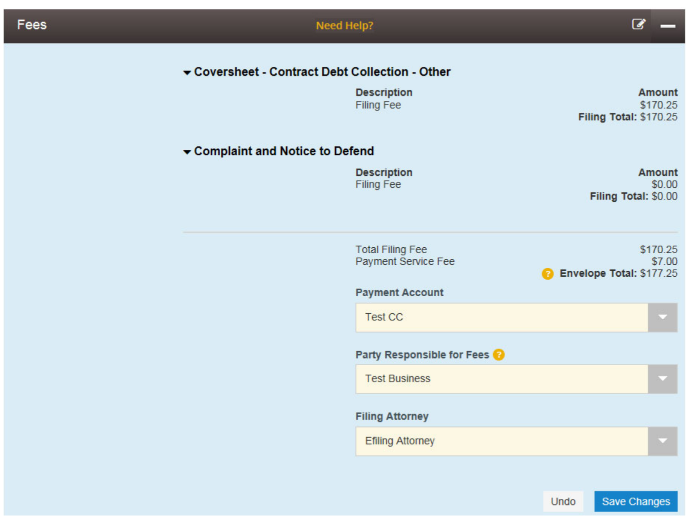
After saving the initial filing code, select "Add Another Filing." From the filing code drop-down, select the additional filing, such as Complaint or Summons for Civil Cases, or Scheduling Order, for Family Cases. Upload the document for the additional filing. NOTE: Please note for optimal manageability, the court recommends that document size for filings does not exceed 25 MB per document and 35 MB per envelope.

Required fields are outlined in red.

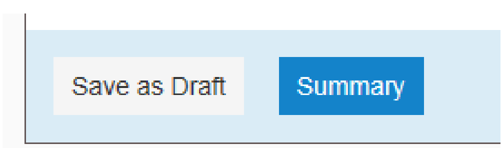


Fees

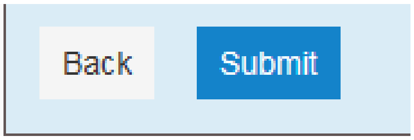
The Fees section will display the fees that are associated with the filing. Select the payment account, party responsible and filing attorney. “Save Changes” when finished.



At the bottom of the screen, “Save as Draft,” will exit the filing and take you back to the home page. You can resume the filing later. “Summary” will take you to the summary page, where you can review the filing prior to submission.



If you wish to make changes, you may do so at this time. Select "Submit" when you are ready to submit the filing. A confirmation is received when the filing is submitting.



Filing Status
As filings are entered into the system, they are given a status based on where they are in the e-filing process. The table below offers a brief description of each status.

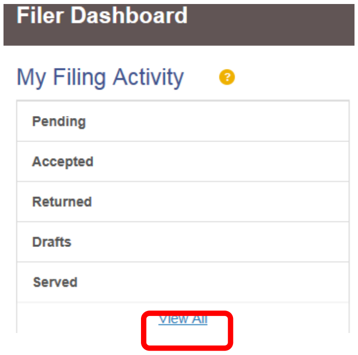
Status	**Description**
Draft	Filer entered full or partial Filing data, but has not yet submitted Filing
Submitting	Filing has been submitted, with the document file format and payment information in process of being verified by the application.
Submitted	Document file format and payment information has been verified and accepted, but the filing has not yet entered the Review Queue/Workflow Process
Under Review	A clerk reviewer has selected filing from a queue.
Accepted	Reviewer has reviewed Filing and accepted
Rejected	Reviewer has reviewed Filing and rejected
Served	Service Only Filings Completed
Cancelled	Filer Cancels Filing; Filer can only cancel filings with a status of Draft, Submitting and Submitted
Submission Failed	File format or billing error has occurred upon Filer submitted Filing. Failure specifics are available via "View Details", and Filer is notified of specifics via e-mail.

Post Filing

After a filing has been submitted, the case will be given a system-generated number referred to as the "Envelope number," and it will now appear in the Pending section under My Filing History with a status of "submitted."

Prior to review, the filing can be cancelled by selecting "Actions" and then cancelling. If the envelope is already in review, the envelope can no longer be cancelled.

The status of the filing will change as it is reviewed, and then accepted or rejected. Based upon acceptance or rejection, the filing will move to the appropriate location under My Filing Activity. Select "View All" to see all filings submitted.

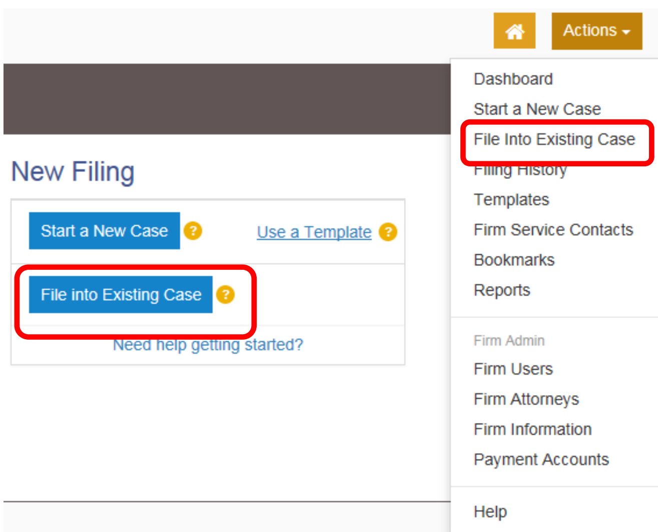


Acceptance/Rejection of Filing

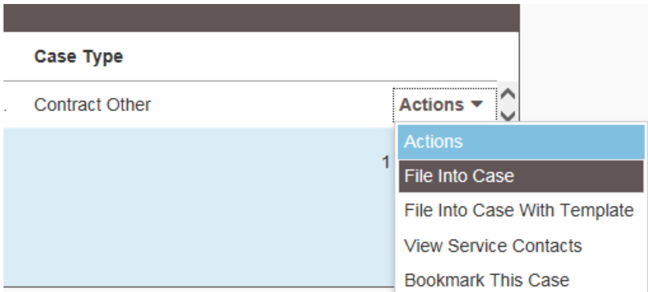
A notification will be sent upon acceptance or rejection of the filing. An acceptance notification will contain the case number assigned and the time-stamped document(s). A rejection notification will include the reason for rejection. Please contact the Clerk of Judicial Records – Civil Division if more information is needed regarding rejections.

Subsequent Filings

Select "File Into Existing Case" from the Filer Dashboard, or under the orange "Actions" menu.



Search for an existing case by Case Number or by Party. When the case is returned, under the Actions menu, select "File Into Case."



Changes to Case Information and Party Information are not accessible during subsequent filings.

Under Filings, users will upload documents for filing. For subsequent filings, users may choose one of three options:

- EFile – The document will be submitted for electronic filing
- Serve – The document will be electronically served to the service parties, but will not be timestamped or electronically filed
- EFileAndServe - The document will be submitted for electronic filing. After acceptance, the timestamped document will be electronically served to the service parties.

Users will need to enter a description for the filing and upload the appropriate documents. All documents that are to be filed electronically shall be filed in Portable Document Format (PDF).

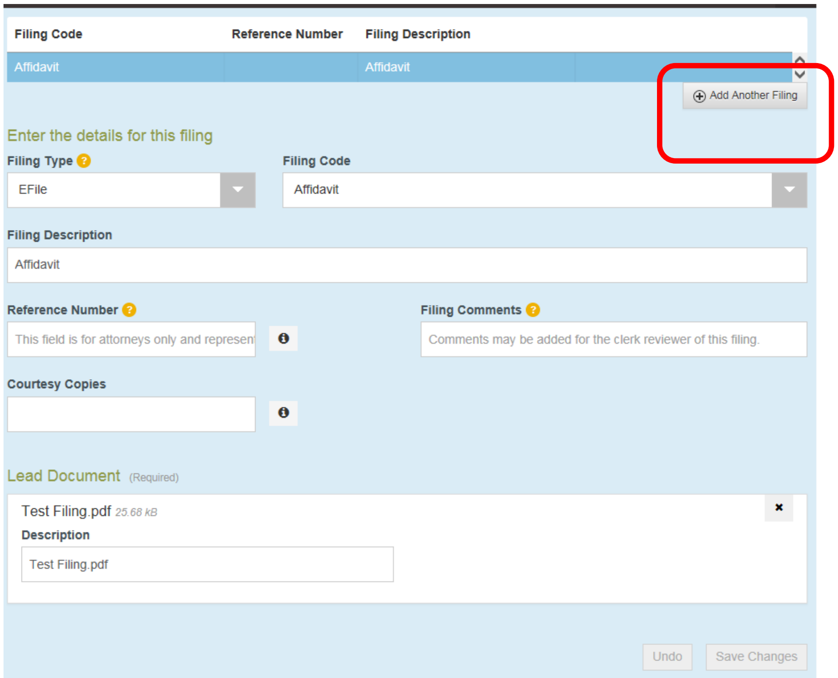
NOTE: When saving documents to submit through efiling, please refrain from using the listed special characters in the name of your file as these are known to cause issues with processing.

- < (less than)
- > (greater than)
- : (colon)
- " (double quote)
- / (forward slash)
- \ (backslash)
- | (vertical bar or pipe)
- ? (question mark)
- * (asterisk)

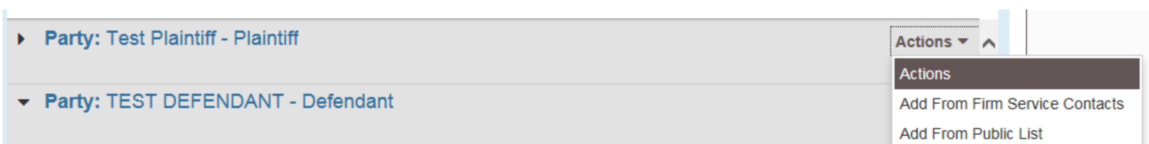
Reference Number is not a required field. It is available for user reference purpose only. The Filing Comments field may be used to enter a note for the Clerk of Judicial Records – Civil Division. Entering e-mail address(es) in the Courtesy Copies field will send a timestamped copy of the filing after it has been accepted to all addresses listed. NOTE: The Courtesy Copy is not service and is not tracked as service.

If you have several items to file for the same case number, all items may be filed in the same envelope. NOTE: for optimal manageability, the court recommends that document size for filings does not exceed 25 MB per document and 35 MB per envelope.

Select “Add Another Filing” to add multiple filings to the same envelope.

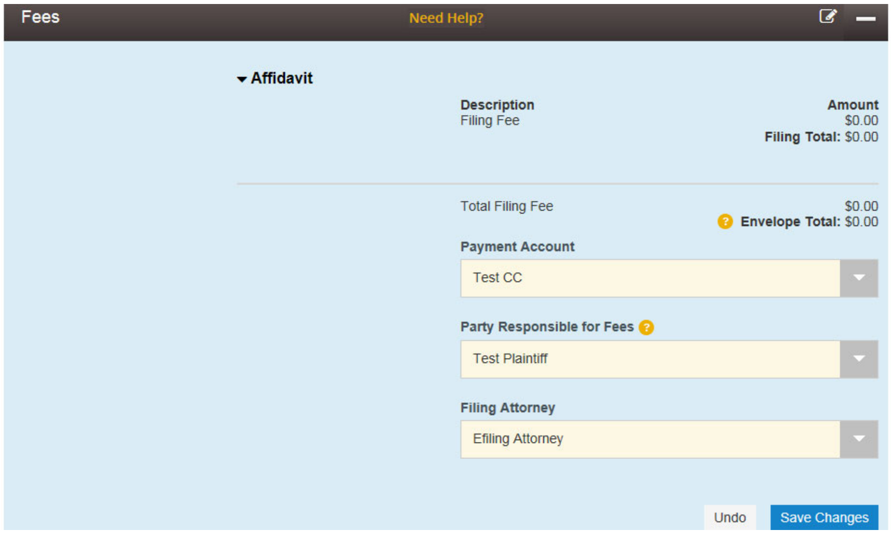


If you chose Efile and Serve, you can add service contacts or serve existing service contacts. NOTE: Service contacts added by your firm may only be modified by your firm. To add a service contact, select the Actions menu and choose to add a service contact from your firm's list or from the public list.

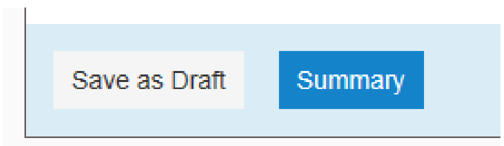


If there are fees associated with your filing, they will appear in the Fees section. The Payment Account, Party Responsible for Fees, and Filing Attorney fields are required, even if the envelope total is $0.00.

NOTE: If your subsequent filing does not have a filing fee, there is no additional fee to use File & Serve. A payment account is required to submit all filings but your credit card will not be charged.



Click the button for Summary to proceed



As previously described when creating the initial filing, the summary presents all of the filing information to the user at a glance. Edits can be made to all of the information from this screen, except for the case information and party information. The filing will remain in a Draft status until submitted

Troubleshooting

Rejected Filings

If a filing is rejected by Clerk of Judicial Records – Civil Division, users will not be able to edit the existing filing. Users have the option to copy the filing by selecting "Copy Envelope" from the Actions menu. This will copy the rejected filing and allow for users to edit incorrect or missing information and resubmit for review.

Once submitted, the filing will be in queue for review by the Clerk of Judicial Records. NOTE: A copied envelope will receive a new timestamp upon resubmission.

Cancelling a Filing

If a filing has been submitted incorrectly, it can be cancelled prior to review by Clerk of Judicial Records – Civil Division. While the filing is in the "Submitted" status, user can select "Cancel" from the Actions menu. This will prevent the filing from being reviewed. A filing cannot be edited, once cancelled. Users may copy the filing (described above) to edit and resubmit.

NOTE: A filing that has been cancelled will remain in the personal workspace of the filer. It cannot be deleted.

Filing Assistance

For account or technical assistance, please contact File & Serve support at 1-800-297-5377.

For questions regarding Lehigh County Civil e-filing procedures, please contact the Clerk of Judicial Records via e-mail at OFSCivilSupport@lehighcounty.org.

For question regarding Lehigh County Family e-filing procedures, please contact Family Court via e-mail at OFSFamilySupport@lehighcounty.org.

To send a courtesy copy to Court Administration: OFSCourtAdminCivil@lehighcounty.org.