



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/ofswb>. 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 e-filing 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”



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.

The screenshot shows a registration form titled "Register". At the top, there is a breadcrumb trail: "User Information > Firm Information > Terms and Conditions > Complete". The form contains several input fields: "First Name" (with "Test" entered), "Middle" (empty), "Last Name" (with "Filer" entered), "Email Address" (empty), "Password" (empty), "Security Question" (with a placeholder text: "Enter a simple question that can only be answered by you. Example: High School Mascot"), and "Security Answer" (empty). A "Next" button is located at the bottom right of the form.

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.



Register for a Firm Account

Perfect for:

- Attorneys
- Firms with multiple filers
- Solo Attorney Practitioners

Register for a Self-Represented Account

Perfect for:

- Pro Se Filers
- Process Servers
- Landlords / Tenants

Before you register for a Firm Account, please check with your firm to ensure an account has not already been created. If your firm has already been created, please ask your firm administrator to invite you to join the firm.

Firm Information

Firm Name

Country

Address Line 1

City State

Zip Code Phone Number

Require administrator approval of new user registration

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.



Register

User Information » Firm Information » **Terms and Conditions** » Complete

[Click here to print agreement](#)

Welcome to the online services of Tyler Technologies, Inc. and the County of LeHigh, Pennsylvania. Please read this Agreement carefully. It governs Your access to and use of the Odyssey File & Serve application through the Tyler Internet Site. Your use of the Tyler Internet Site and/or other Tyler Services or Tyler Technology is conditioned upon Your acceptance of this Agreement. By clicking on the "I Accept" button, You agree to be legally bound by all of the terms and conditions of this Agreement. If you are acting as an employee, You represent and agree that this Agreement shall bind Your employer and that You are authorized to do so. As used in this Agreement, "You" or "Your" includes You and Your employer.

Section 1. Definitions

Section 2. License; Restrictions on Use

Section 3. Access to the Tyler Internet Site

Section 4. Limitations on Use

Section 5. Fee Schedule

Section 6. Proprietary Rights

Section 7. Disclaimers and Limitations

Previous [I Agree - Create My Account](#)

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.

County of Lehigh Pennsylvania

GoToAssis **Show Me How To...**

Home Actions

Filer Dashboard

My Filing Activity ?

Pending	
Accepted	7
Returned	4
Drafts	7
Served	

[View All](#)

New Filing

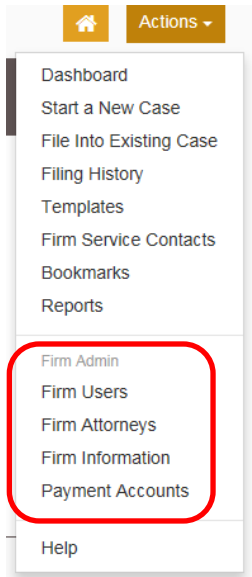
[Start a New Case](#) ? [Use a Template](#) ?

[File into Existing Case](#) ?

[Need help getting started?](#)

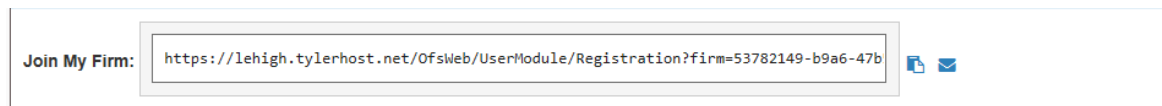


Prior to any filings, a firm administration will need to configure at least one payment account and at least one attorney. Select the orange Actions menu to access the Firm Admin options.



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

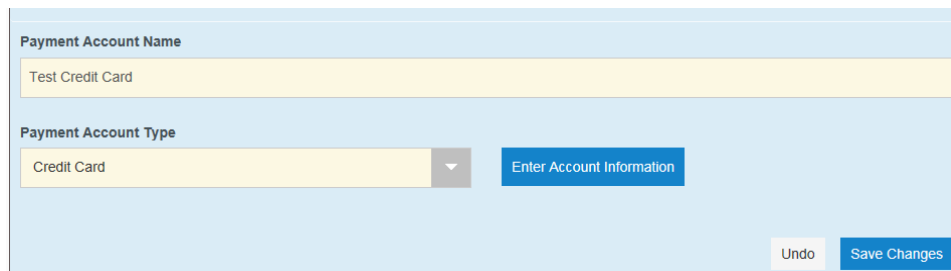


Payment Accounts

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”.

Cardholder Information
Enter the information as it appears on the Cardholder Account. The fields marked with a red asterisk (*) are required fields.

Card Type *

Card Number *

Exp Month * Exp Year *

CVV Code * [CVV Help](#)

Name on Card *

Address Type US Foreign

Address Line 1 *
Street address, P.O. box, company name, c/o

Address Line 2 *
Apartment, suite, unit, building, floor, etc.

City *

State *

Zip Code *

Enter all of the Credit Card information and click “Continue”:

Firm Attorneys

Attorney Number

Example: 0123456

First Name

Middle Name

Last Name

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.

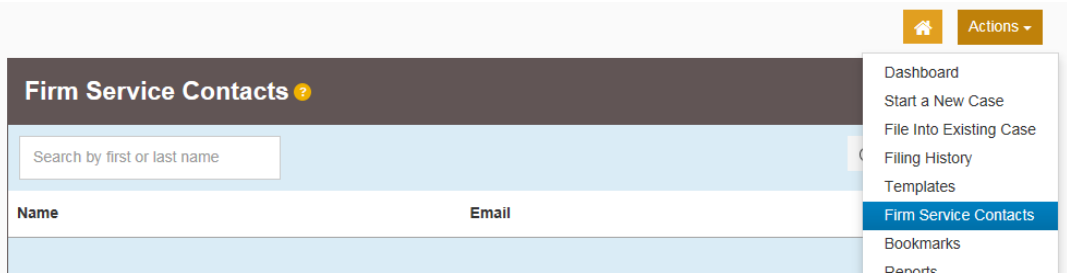
Firm Service Contacts

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.



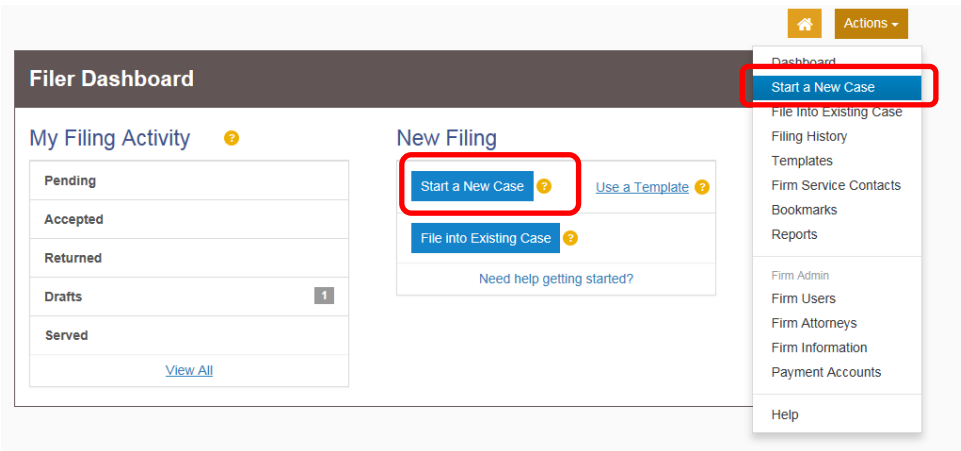
Select “Add Service Contact” to add a new contact. Fields outlined in red are required. Your firm name, address, and phone number will default from the previously entered firm information. This can be changed, if needed, for the service contact. The e-mail address entered will be the e-mail to which 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.

A screenshot of a form titled 'Add Service Contact'. The form contains several input fields: First Name (with 'Service' entered), Middle Name, Last Name (with 'Contact' entered), Firm Name (with 'Test Firm' entered), Email, Administrative Copy, Country (dropdown menu with 'United States of America' selected), Address Line 1 (with '123 Test St' entered), Address Line 2, City (with 'Allentown' entered), State (dropdown menu with 'Pennsylvania' selected), Zip Code (with '18101' entered), and Phone Number. At the bottom of the form, there is a checkbox labeled 'Make This Contact Public' which is checked. This checkbox and its label are enclosed in a red rectangular box. There are also two small icons (a speech bubble and a question mark) next to the checkbox.

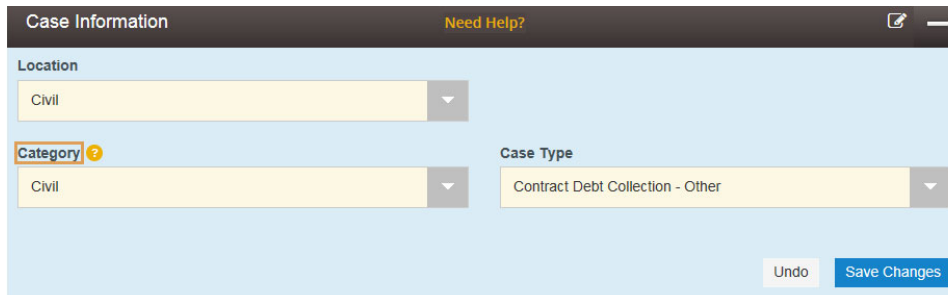
Submitting a New Case

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

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 efilings, 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.

The screenshot shows a web form for entering filing details. The form has a dark header with 'Filings' and 'Need Help?' links. The main content area is light blue and contains several sections: 'Enter the details for this filing' with dropdowns for 'Filing Type' (EFile) and 'Filing Code' (Coversheet - Contract Debt Collection - Other - \$170.25); a 'Filing Description' text area (Coversheet); 'Reference Number' and 'Filing Comments' text areas; 'Courtesy Copies' text area; and a 'Cover Sheet (Required)' section with an uploaded PDF file 'Test Filing.pdf' (25.68 KB) and a description text area. The 'Reference Number' and 'Courtesy Copies' fields are outlined in red. At the bottom right, there are 'Undo' and 'Save Changes' buttons.

Add Another Filing

After saving the initial filing code, select “Add Another Filing.” From the filing code dropdown, 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.



Filing Code	Reference Number	Filing Description
Coversheet - Contract Debt Colle...		Coversheet

Enter the details for this filing

Filing Type: EFile

Filing Code: Click to select Filing Code

Filing Description: This description will be recorded as descriptive comments for the court filing.

Reference Number: This field is for attorneys only and represent

Filing Comments: Comments may be added for the clerk reviewer of this filing.

Courtesy Copies:

Buttons: Undo, Save Changes

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.

Description	Amount
Filing Fee	\$170.25
Filing Total:	\$170.25
Filing Fee	\$0.00
Filing Total:	\$0.00
Total Filing Fee	\$170.25
Payment Service Fee	\$7.00
Envelope Total:	\$177.25

Payment Account: Test CC

Party Responsible for Fees: Test Business

Filing Attorney: Efilng Attorney

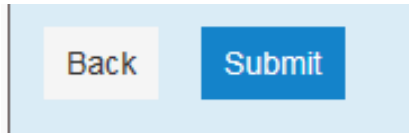
Buttons: Undo, Save Changes

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.

Buttons: Save as Draft, Summary



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
<i>Draft</i>	Filer entered full or partial Filing data, but has not yet submitted Filing
<i>Submitting</i>	Filing has been submitted, with the document file format and payment information in process of being verified by the application.
<i>Submitted</i>	Document file format and payment information has been verified and accepted, but the filing has not yet entered the Review Queue/Workflow Process
<i>Under Review</i>	A clerk reviewer has selected filing from a queue.
<i>Accepted</i>	Reviewer has reviewed Filing and accepted
<i>Rejected</i>	Reviewer has reviewed Filing and rejected
<i>Served</i>	Service Only Filings Completed
<i>Cancelled</i>	Filer Cancels Filing; Filer can only cancel filings with a status of Draft, Submitting and Submitted
<i>Submission Failed</i>	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.



The screenshot shows the 'Filer Dashboard' with a section titled 'My Filing Activity' containing a table with the following rows: Pending, Accepted, Returned, Drafts, and Served. Below the table is a red-bordered button labeled 'View All'.

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.

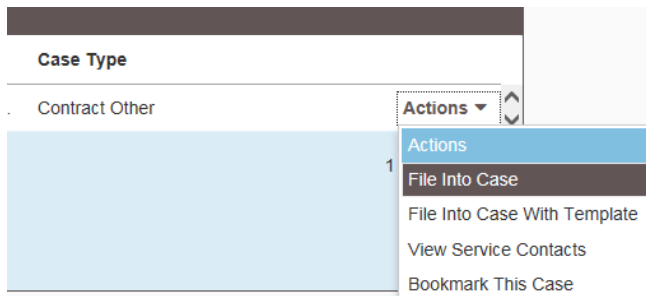
Subsequent Filings

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

The screenshot shows the 'New Filing' section with two buttons: 'Start a New Case' and 'File into Existing Case', both highlighted with red boxes. To the right, the 'Actions' dropdown menu is open, with 'File Into Existing Case' also highlighted with a red box.

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 efilings, 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.



The screenshot shows a web form for filing an affidavit. At the top, there is a table with columns for 'Filing Code', 'Reference Number', and 'Filing Description'. Below this, there is a section for 'Enter the details for this filing'. This section includes a 'Filing Type' dropdown menu set to 'EFile', a 'Filing Code' dropdown menu set to 'Affidavit', a 'Filing Description' text box containing 'Affidavit', a 'Reference Number' field with a note 'This field is for attorneys only and represents...', a 'Filing Comments' field with a note 'Comments may be added for the clerk reviewer of this filing.', a 'Courtesy Copies' field, and a 'Lead Document' section showing a file named 'Test Filing.pdf' (25.68 KB) with a description 'Test Filing.pdf'. At the bottom right of the form, there are 'Undo' and 'Save Changes' buttons. A red rectangular box highlights the 'Add Another Filing' button located in the top right corner of the form area.

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.

The screenshot shows a list of parties in a legal case. The first party is 'Party: Test Plaintiff - Plaintiff' and the second is 'Party: TEST DEFENDANT - Defendant'. An 'Actions' dropdown menu is open for the second party, showing two options: 'Add From Firm Service Contacts' and 'Add From 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.



Description	Amount
Filing Fee	\$0.00
Filing Total: \$0.00	

Total Filing Fee: \$0.00
Envelope Total: \$0.00

Payment Account: Test CC
Party Responsible for Fees: Test Plaintiff
Filing Attorney: Efilng Attorney

Undo Save Changes

Click the button for Summary to proceed

Save as Draft Summary

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.

