



Lehigh County

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

Electronic Filing Instructions – Lehigh County Pilot Program

System Registration:

To access the electronic filing system, open an internet browser and go to <http://lehigh.tylerhost.net>. The page in figure 1 will display:

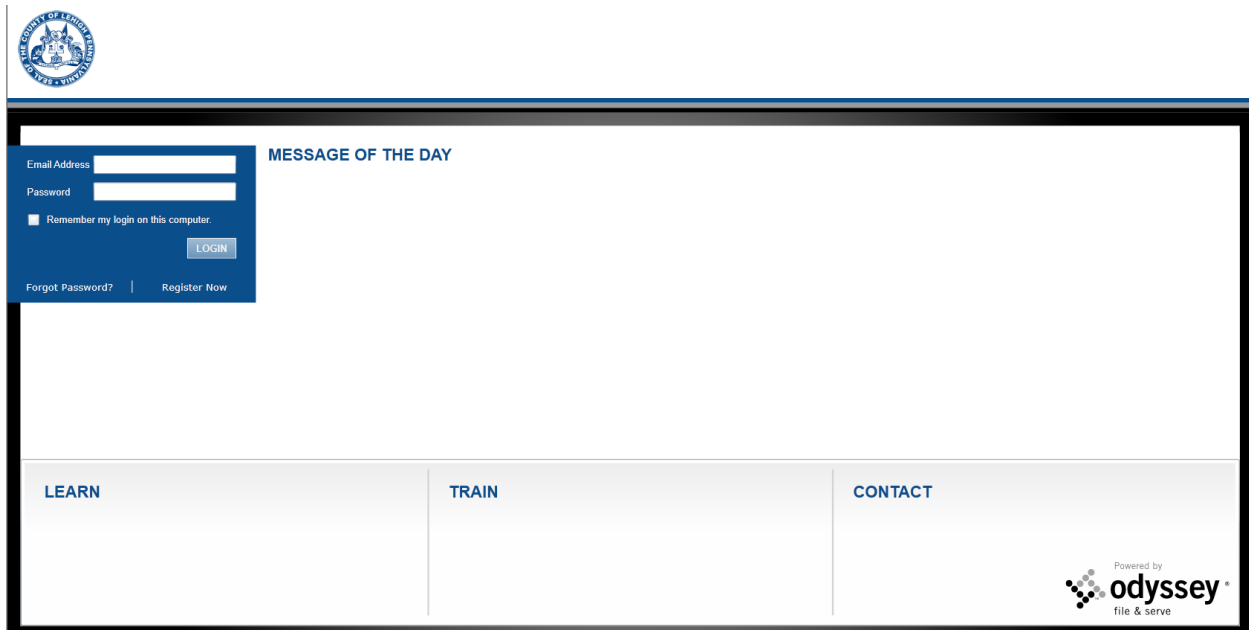


Figure 1

Before filing electronically, users must register with the application. To do so, click the link “Register Now” (figure 2)

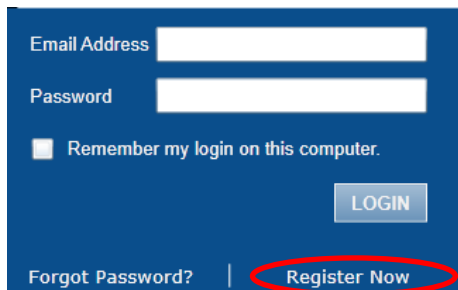


Figure 2

The registration wizard will display and guide users through the five step registration process:

Step 1



Select Firm Administrator as the registration type

File and Serve Registration Wizard **Step 1 of 5**

I want to Register as a

Firm Administrator
Each firm must have a designated person to administer the E-Filing system. The Administrator will register the firm and be responsible for setting up and maintaining all users, credit card accounts, and attorneys at the firm.

User with an Existing Firm
Your firm has already been registered with the E-Filing system. You must know your firm ID and have been given permission to set up your account by your Firm Administrator. The Firm ID serves as the common identifier for all users within your firm.

An Independent User
You are a single user, not associated with or represented by a law firm.

All required fields are indicated by an "*". There is no registration fee for File & Serve.

Figure 3

Step 2

Review the Terms and Conditions, click the checkbox next to “I Agree”

File and Serve Registration Wizard **Step 2 of 5**

Welcome to the online services of Tyler Technologies, Inc. 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
- Section 8. Your Warranties and Indemnification

I Agree

Figure 4



Step 3

Provide contact information. Please note that any field marked with an asterisk (*) is a required field and must have information entered before proceeding.

- If the firm administrator will register all firm users, the options “Allow Users to Self Register” and “Require Administrator Approval” do not need to be enabled.
- If firm users are allowed to self register but will require approval from the firm administrator, enable both “Allow Users to Self Register” and “Require Administrator Approval.”
- If firm users are allowed to self register and do not need approval from the firm administrator, only “Allow Users to Self Register” needs to be enabled. (Firm Administrator Approval is recommended)

File and Serve Registration Wizard **Step 3 of 5**

Firm Information

Name*	Test Firm		
Street Address*	1234 Test St		
Street Address Line 2			
City*	Allentown		
State*	Pennsylvania	Zip*	18101
Phone Number*	610-555-5555		

New User Registration

Allow Users to Self Register

Require Administrator Approval of New User Registration

[Previous](#) [Cancel](#) [Next](#)

Figure 5

Step 4

Complete the user information. Similar to the previous step, all required fields will be marked with an asterisk (*).

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.



File and Serve Registration Wizard **Step 4 of 5**

User Information

First Name* MI

Last Name*

Email Address*

Verify Email Address*

Password*
Your password is case sensitive and must be at least six characters.

Verify Password*

Attorney

I am also an Attorney **Attorney Number***

Compose a simple question and answer pair which will allow you to restore your password, should you forget it. Please choose a simple, specific question that can only be answered by you. Example: High School Mascot or The Name of My First Pet.

Security Question*

Security Answer*

Figure 6

If you are also an attorney, please enter your bar number for verification. Please enter your bar number in a seven-digit format (example: 0123456).

Your 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. You will also receive an e-mail granting you Attorney Docket Access which allows viewing of Court dockets.

Verify Attorney Information ✕

Verifying attorney number: 9999999

Test Attorney

Please verify that your name appears correctly above. If the name is not correct, check that you entered the correct attorney number or contact the court to verify your attorney registration.

Is this information correct?

Figure 7



Step 5

The registration wizard is complete.

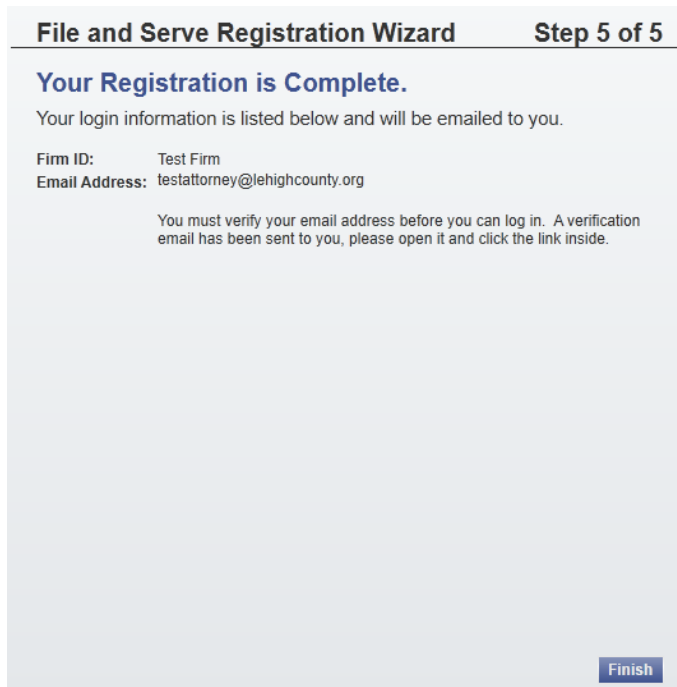


Figure 8

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.

Account Configuration

After logging in, the application will display the personalized workspace. The tabbed interface will default to display your submitted filings.

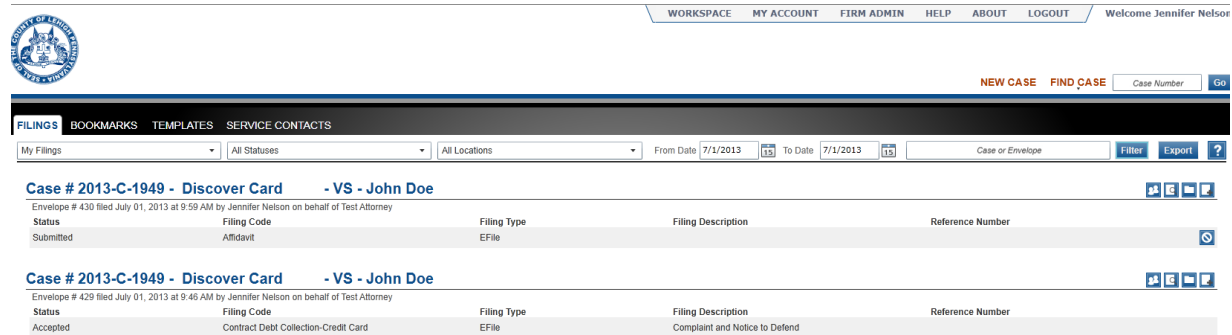


Figure 9

Prior to any filings, users will need to click the link labeled “Firm Admin,” located in the menu in the upper right of the screen.



Figure 10

The Firm Admin menu item provides the firm administrator with the ability to approve new users, manage firm users, manage attorneys, configure payment accounts and update firm information

Approve New Users

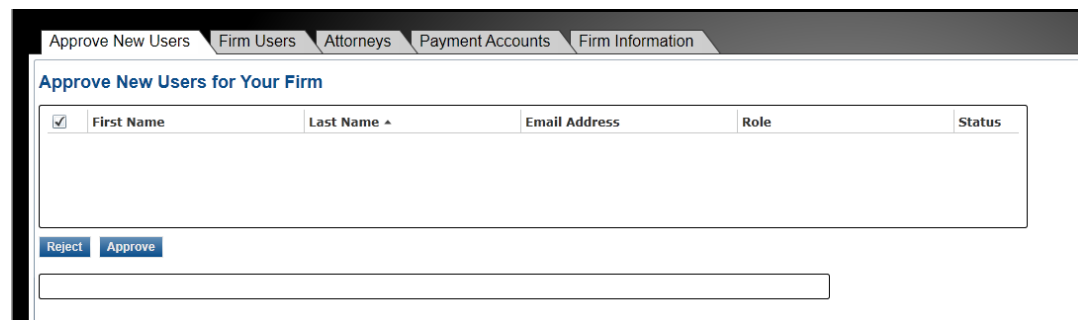


Figure 11

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.**

In the Firm Admin screen, select the Tab for “Payment Accounts”.
Click the button labeled “Add Payment Account”

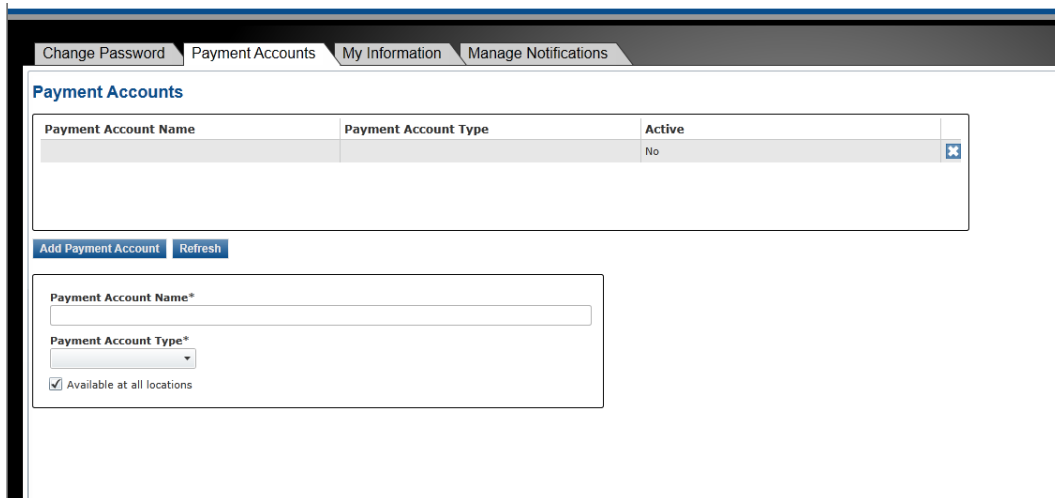


Figure 12

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 Credit Card Information”.

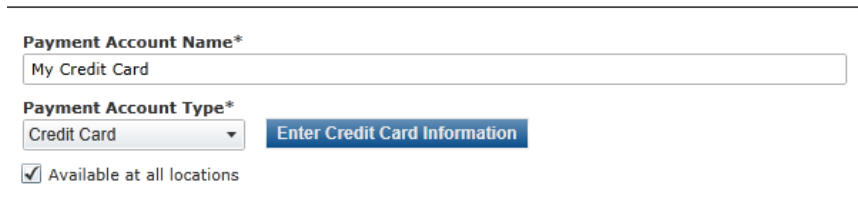


Figure 13

A new window will appear:

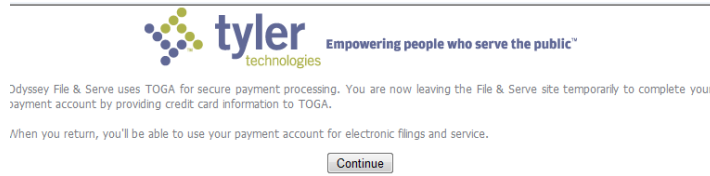


Figure 14

Click “Continue” to enter your Credit Card information.

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

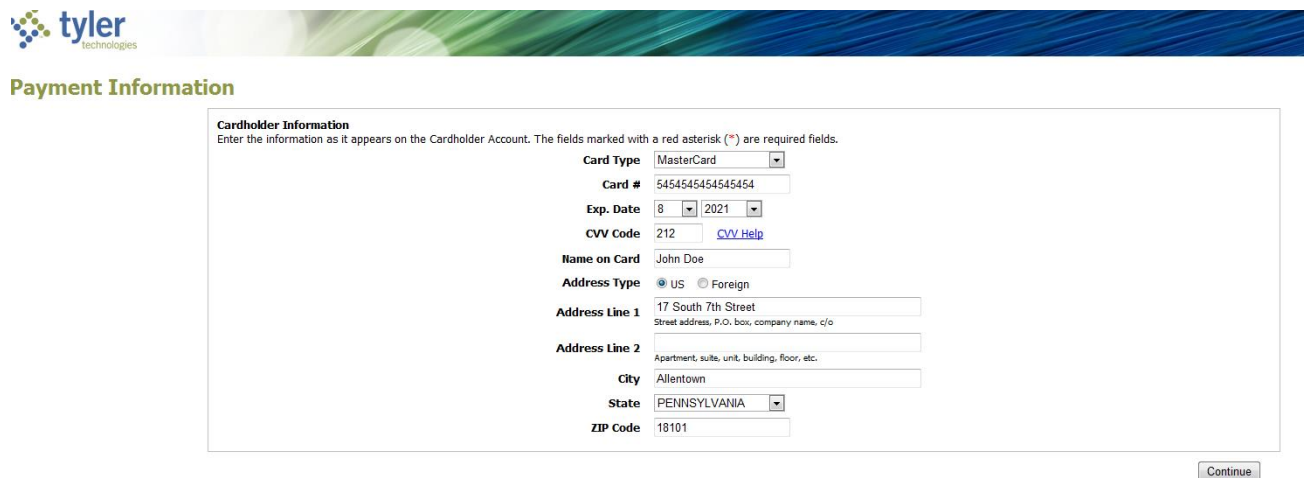


Figure 15

A verification screen will display, showing all of the information that was entered (with the credit card masked). Once verified, the payment account will now be set up and associated with the user account.

Manage Notifications

The electronic filing application is equipped to send notifications to users on various filing events. Users can manage what notifications they receive by selecting the tab “Manage Notifications” under the My Account Menu. This is the primary communication that is offered with the filing process. Users that elect to not receive the communications, and uncheck the notifications, must log back into the system to view any change of status.

It is our recommendation that all notifications be enabled.

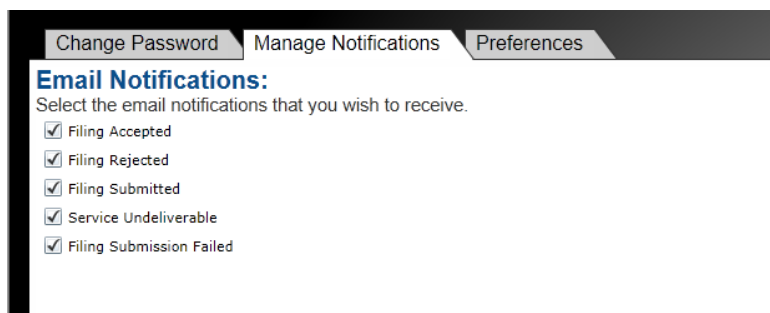


Figure 16

Submitting a New Case

In the Workspace, select the link labeled “New Case” located in the upper right of the screen.

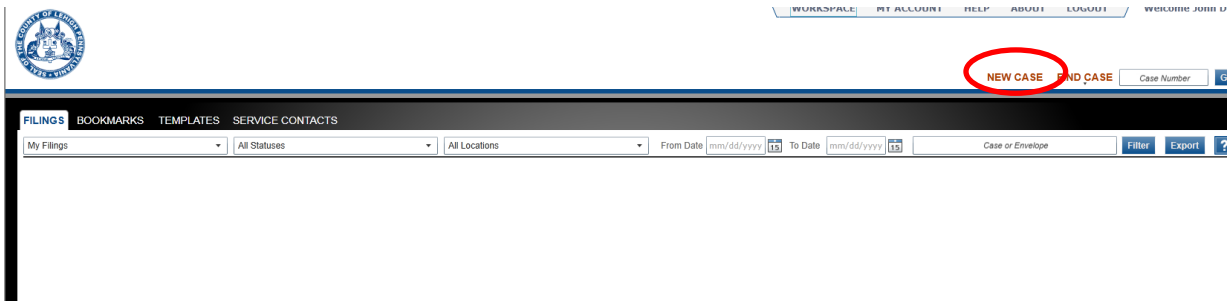


Figure 17

The application will lead users through the four step process of submitting a new case

Case Information

The initial screen has four drop down menus to capture preliminary details. Location and Category will default to “Civil.” Select the appropriate case type. Select the attorney submitting the filing. Users who may have entered more than one payment account will need to select a payment account.

To continue to the next step, select the button labeled “Parties” in the lower right corner of the screen.



Figure 18

Parties

The next screen allows users to enter the information for the appropriate parties. At least one of each party must be entered to proceed.

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

When finished entering Parties, click the button labeled “Filings” in the bottom right of the screen.

Civil - Consumer Credit

1 Case Information 2 Parties 3 Filings 4 Summary

Enter the Details for the Parties Involved in this Case

Party Type	Name	Attorney
Plaintiff	Bank of Test	Test Attorney
Defendant	John Doe	

ADD PARTY

Party Type*
Defendant

Person Business

Attorney

First Name*
John

Middle

Last Name*
Doe

Address

City

State

Zip

Phone

Filer ID

Filings

Figure 19



Filings

The Filings screen is the area where users will upload their forms and documents for filing.

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: Reference Number is not a required field. It is available for user reference purpose only.

Figure 20

The right side of the screen will display the fees that are associated with the filing. In the drop down box labeled “Parties Responsible for Fees”, ensure the party represented is present. If not, select from the drop-down.

Summary

Figure 21

When completed, click “Summary” in the bottom right of the screen.



Summary

As the last step of the filing, the application presents a summary screen of the filing. The information entered in the previous steps can be reviewed and edited from this screen if needed. The filing remains in a draft status until the "Submit" button is clicked at the bottom right.

Civil - Consumer Credit

1 Case Information 2 Parties 3 Filings 4 Summary

Envelope and Filing Summary

Case Information Edit

Location: Civil Filing Attorney: Test Attorney
Case Category: Civil Payment Account: Test Credit Card
Case Type: Civil
Date Filed: Consumer Credit

Parties Edit

Party Type	Name	Address	Phone	Attorney
Plaintiff	Discover Card			Test Attorney
Defendant	John Doe	456 Test Street Allentown, PA 18101		

Filings Edit

Filing Code	Filing Description	Reference Number	Filing Type
Contract Debt Collection-Credit Card	Complaint and Notice to Defend		EFile

Lead Document	File Name	Status
	Complaint.pdf	OK

Fees

Contract Debt Collection-Credit Card	
Filing Fee	\$152.50
Total this Filing	\$152.50
Case Initiation Fee	\$0.00
Convenience Fee	\$7.00
Envelope Total	\$159.50

Payment

Payment Account*
Test Credit Card

Party Responsible for Fees*
Discover Card

Filing Attorney

Filing Attorney*
Test Attorney

Submit

Filings

Figure 22



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 Workspace under “Filings” with a status of submitted.

The status of the filing will change as it is reviewed, and then accepted or rejected.

Prior to review, the filing can be cancelled by clicking on the  icon to the right of the filing.

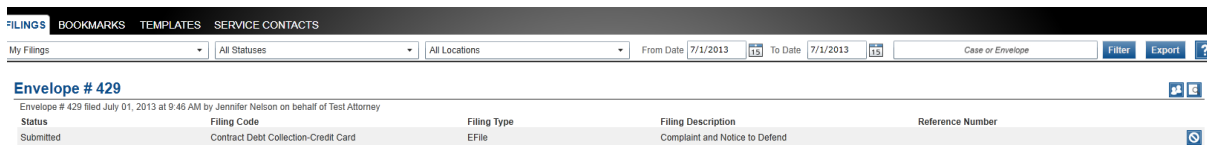



Figure 23

To view the details of the filing, click on the  icon to the right of the envelope.

The details entered with the filing as well as status and the date and time of submittal is presented and can be printed from this.




Figure 24

Acceptance of Filing

Users that have their email notifications (detailed previously) configured to receive the corresponding alerts will receive an email stating the acceptance of their filing. The notification will contain the case number assigned for filing. Log back in to the website to access the filing.

Subsequent Filings

Once a filing has been accepted and a case has been created, users may file additional documents into the case as necessary. From the Workspace, find the desired case and click on the  icon to the right of the case header.

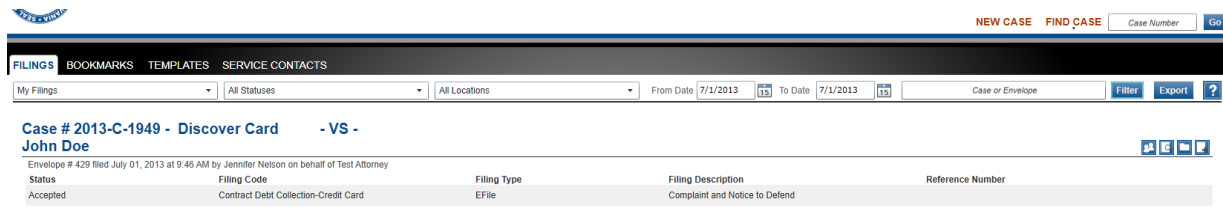


Figure 25

The user will be brought to the same screen displaying the parties involved in the case. Existing parties on the case cannot be edited.



Figure 26

Click the button for Filings to proceed.

Users can submit additional filings by selecting the appropriate filing code from the drop-down. Attach a document to the filing.

Case 2013-C-1949 Discover Card - VS - John Doe Civil - Consumer Credit

1 Parties 2 Filings 3 Summary

Enter Filing Details

[Add Another Filing](#)

Select Filing Code*
Affidavit EFile Service

Filing Description

Reference Number ⓘ
This field is for attorneys only and represents their internal file tracking number.

Documents ⓘ

Lead Document*	Affidavit.pdf 76.5 kb Description Affidavit.pdf	
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Attachments [Click to Browse](#)

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

Courtesy Copies ⓘ

Figure 27

Select the Payment Account, Party responsible for fees, and Filing Attorney. If there is a fee associated with the filing it will appear on the right side. If this filing has no fee, the envelope total will appear as \$0.00.

Fees

Affidavit

Filing Fee	\$0.00
Total this Filing	\$0.00

Envelope Total \$0.00

Payment

Payment Account*
Test Credit Card

Party Responsible for Fees*
Discover Card

Filing Attorney

Filing Attorney*
Test Attorney

[Summary](#)

Figure 28

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. The filing will remain in a Draft status until submitted



Case 2013-C-1949 Discover Card - VS - John Doe Civil - Consumer Credit

Parties Filings Summary

Envelope and Filing Summary

Case Information Edit

Location:	Civil	Filing Attorney:	Test Attorney
Case Category:	Civil	Payment Account:	Test Credit Card
Case Type:	Consumer Credit		
Date Filed:	7/1/2013		
Case Short Title:	Discover Card - VS - John Doe		

Parties Edit

Party Type	Name	Address	Phone	Attorney
Plaintiff	Discover Card			Test Attorney
Defendant	John Doe	456 Test Street Allentown, PA 18101		

Filings Edit

Filing Code	Filing Description	Reference Number	Filing Type
Affidavit			EFile
Lead Document	File Name Affidavit.pdf		Status OK

Fees

Affidavit	Filing Fee	\$0.00
	Total this Filing	\$0.00
Envelope Total		\$0.00

Payment

Payment Account*
Test Credit Card

Party Responsible for Fees*
Discover Card

Filing Attorney

Filing Attorney*
Test Attorney

Submit

Figure 29

Users will now see two entries in their workspace for the case; the initial filing as well as the subsequent filing. Each subsequent filing will have a status associated with it.

FILINGS BOOKMARKS TEMPLATES SERVICE CONTACTS

My Filings All Statuses All Locations From Date 7/1/2013 To Date 7/1/2013 Case or Envelope Filter Export

Case # 2013-C-1949 - Discover Card - VS - John Doe Print Email

Envelope # 430 filed July 01, 2013 at 9:59 AM by Jennifer Nelson on behalf of Test Attorney

Status	Filing Code	Filing Type	Filing Description	Reference Number
Submitting	Affidavit	EFile		

Case # 2013-C-1949 - Discover Card - VS - John Doe Print Email

Envelope # 429 filed July 01, 2013 at 9:46 AM by Jennifer Nelson on behalf of Test Attorney


Status	Filing Code	Filing Type	Filing Description	Reference Number
Accepted	Contract Debt Collection-Credit Card	EFile	Complaint and Notice to Defend	

Figure 30




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 clicking on the  icon to the right of the filing label. This will copy the rejected filing and allow for users to edit the incorrect or missing information and resubmit for review.

Once submitted, the filing will be in queue for review by the Clerk of Judicial Records.

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 click the  to the right of the filing. 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 questions regarding the e-filing process, or to report a technical issue, please contact the Clerk of Judicial Records via e-mail at OFSCivilSupport@lehighcounty.org.

