COUNTY OF BERKS, PENNSYLVANIA Prothonotary



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The Berks County Prothonotary Office and Information Systems are proud to announce the following updates to the Electronic Filing System (EFS), effective Monday, 11/9/2020.

Password Change - *instructions attached*

Custody – removal of mediation fee and mediation questions

Divorce – removal and addition of divorce counts

Parties – Subsequent filings – no longer create parties or add counsel

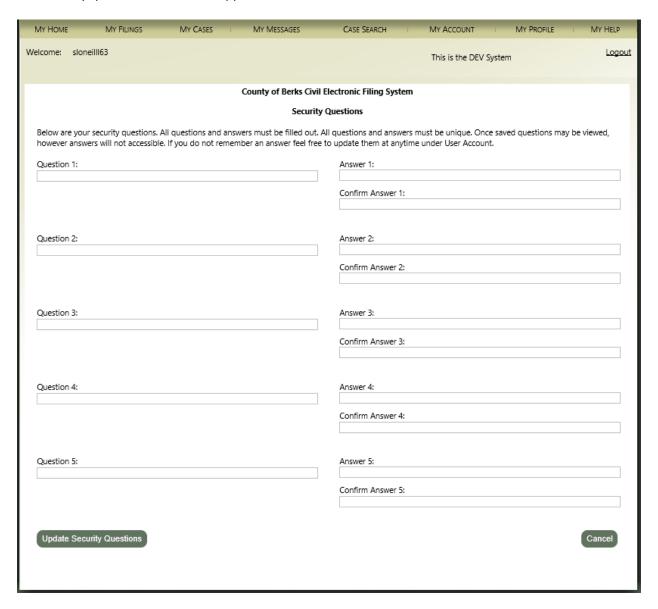
Summary Page – removal of NEXT button from lower right hand corner

Thank you for your patience as we continue to improve the Efiling system.

County of Berks Civil Electronic Filing System – Password

The County of Berks is implementing a new password change policy in order to keep the system secure. The system now requires a new password every ninety (90) days and keeps the last ten (10) passwords. Security questions rather than an email allows users to change their password. If you do not remember your user id, you will still need to contact the EFS Help Desk.

When you log on, if you have not changed your password recently or your security questions are blank, the security questions screen will appear.



Requirements for the security questions are:

- Answer must be longer than five (5) characters.
- Questions must be different.
- User will not be able to view their answer.

Once the security questions are updated, you are redirected to the login page. Users can update their security questions by clicking on the My Account tab.

Password Recovery

To recover your password, click on the Forgot Password? Link on the Home Page. Once the link is clicked, the User Recovery screen appears.

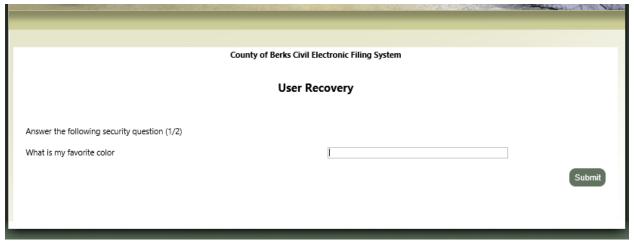


Please enter the e-filing registration email address and click Submit. If the email entered has more than one e-filing account associated with it, a screen allowing you to select which account you are recovering will appear.



Click on the drop down arrow to view all the user names associated with the email address entered. Click on one name and then click on submit.

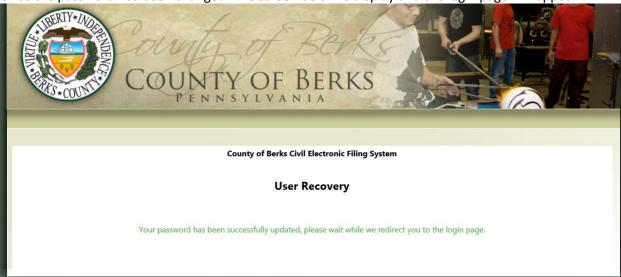
The user will need to provide answers to two (2) of the five (5) security questions. Questions are displayed individually, and the answer provide must match.



Once the answer is typed in click Submit to move to the next question. When both security questions are completed successfully, the screen to change the password is displayed.

	County of Berks Civil Electronic Filing System
	User Recovery
Minimum Requirements For Passw	ord: 8 Character Length, 1 Non-Alphanumeric Character (e.g. @, #, \$, %, &, *), 1 Uppercase Character, 1 Number
New Password:	
Confirm New Password:	
	Submit

Once the password has been changed. The screen below is display and the login page will appear.



Password Expires

Password will expire after ninety days. When it is close to the time for a user to change their password, a message will appear in EFS indicating how many days are left before the current password expires. If the password is not changed prior to the expiration date, the user will receive the message below.

MY HOME MY FILINGS N	MY CASES MY MESSAGES	CASE SEARCH	MY ACCOUNT MY PROFILE	MY HELP
Welcome: shellyqa			This is the QA System	Logout
	County of Berks Civil Ele	ectronic Filing System		
	Password	l Reset		
Your password hasn't been upd	lated in the last 90 days. For security reaso	ons we ask that you update	e your password below before you continue	<u>.</u>
Minimum Requirements For Password: 8 0	Character Length, 1 Non-Alphanumeric Ch	aracter (e.g. @, #, \$, %, &,	*), 1 Uppercase Character, 1 Number	
Old Password:				
New Password:				
Confirm New Password:				
				Submit

COUNTY OF BERKS

Civil Electronic Filing System

eFiling System User Guide

County of Berks 11/9/2020

User Manual for the Civil and Family Courts filings to the County of Berks, PA Prothonotary Office

Version 3.0 11/09/2020

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User Guide

Introduction

This manual provides instructions on how to use Berks County's Electronic Filing System (EFS) to file documents with the Prothonotary's office. EFS can also be used to review the dockets and documents for all cases where the registered user is counsel. Only counsel of record can view the imaged documents for family cases.

Note: The initial release of EFS is available only to licensed attorneys that are active with *The Disciplinary Board of the Supreme Court of Pennsylvania*.

Registration for Access to EFS

During the first phase – only attorneys that are licensed to practice in Pennsylvania can register to use EFS. There is a registration link on the EFS home page. Once the required information is entered, the attorney can submit it to the Prothonotary for review and acceptance. However, if the registration is rejected, any submitted filings are not processed.

System Access

The Electronic Filing System (EFS) allows registered users with Internet access and a browser (Internet Explorer, Safari, or Firefox) the ability to perform the following:

- When eFiling is available for registration, a notification will be posted on the County of Berks
 Prothonotary and Court web sites.
- View or download the most recent version of the User Manual
- Electronically file new and subsequent filings and the supporting documents in the cases
- View documents associated with any cases that the registered user is listed as counsel on the case

Hardware and Software Requirements

The hardware and software needed to electronically file, view and retrieve case documents and information are as follows:

- Windows Personal Computer (running a standard platform such as Windows 7 or Mac OS X v10.7)
- Internet Explorer (Version 8 or better), Chrome, or Safari
- Microsoft Operating System (Windows XP, 7 or better)
- Scanner (e.g., Epson GT-S50 or Fujitsu FI 6130) to transmit documents that are not computer generated
- MS Office or MS Word (2007, 2010, 2013, or 2016)
- Portable Document Format (PDF) Conversion Software (e.g., CutePDF, Softpedia, Adobe Acrobat)
- High Speed Internet Access (e.g., Comcast; Verizon FIOS or AT&T DSL)
- Firewall (e.g., Cisco, Linksys, SonicWALL)
- Access to professional IT support

Note: A scanner should only be used for documents that cannot be produced electronically (e.g. documents signed by a non-attorney). Computer generated documents should not be printed out and then scanned. They should be created and then converted to .PDF before they are filed.

How to Convert/Print/Publish a Document to PDF

Since a PDF format is the only acceptable format to file documents in EFS, you must convert all of your documents prior to submission. The conversion process is merely printing your computer generated document to a portable document format (PDF). You should consult your PDF software instruction guide.

To convert a Microsoft Word document to PDF:

- Select the File menu and select Print PDF
- Save the file as a PDF file which gives it a .PDF extension
- The file is now in PDF format under the designated name and the original document retains its original name and the .DOC extension.

To convert other Word Processing Programs, refer to the PDF software instructions.

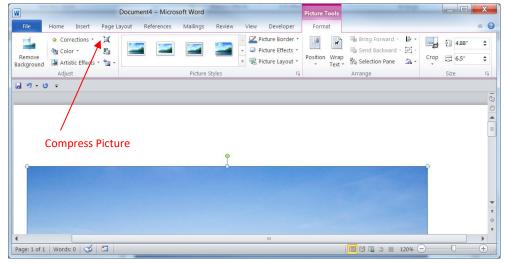
How to reduce the size or Compress a PDF File

The current size limit for PDF files is 10 megabytes. If you are encountering an issue with file size, there are some steps you can take to condense the file.

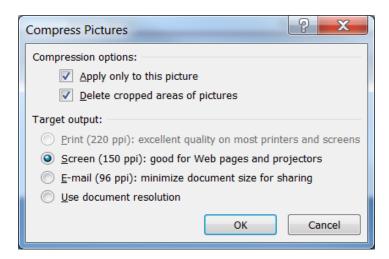
• If you are using Word 2010/2007 click the option to Minimum size when saving the file as a PDF.



- If you are using Adobe X Pro, chose File > Save As > Optimized PDF or Reduced Size PDF.
- There are two free online tools available to compress PDF files. Neevia Online PDF compress: (http://convert.neevia.com/pdfcompress) and SmallPDF (http://smallpdf.com/compress-pdf).
- Images/Pictures in the file can also be compressed. To compress an image/picture:
 - Open the Word document
 - Either double click on a picture or single click on a picture and choose 'Picture Tools" tab.
 - Choose the 'Compress Picture' option.



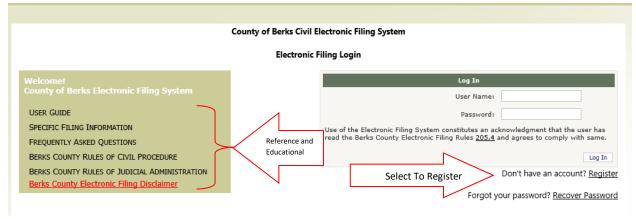
 The Compress Pictures option box will open. Select the options the screen (150ppi) option.



Questions

If you have questions using this User Guide or using EFS, you can call the Prothonotary's office at (610)-478-6970.

Electronic Filing Login Page



- 1. The links to the left on the Login screen provides access to reference and educational material.
- 2. The Log In box on the right side is where attorneys will:
 - a. Log In once they are registered
 - b. Licensed attorneys in good standing with *The Disciplinary Board of the Supreme Court of Pennsylvania* can register with the Prothonotary to use the EFS system for filing by clicking on the *Register* link.

Registration Page

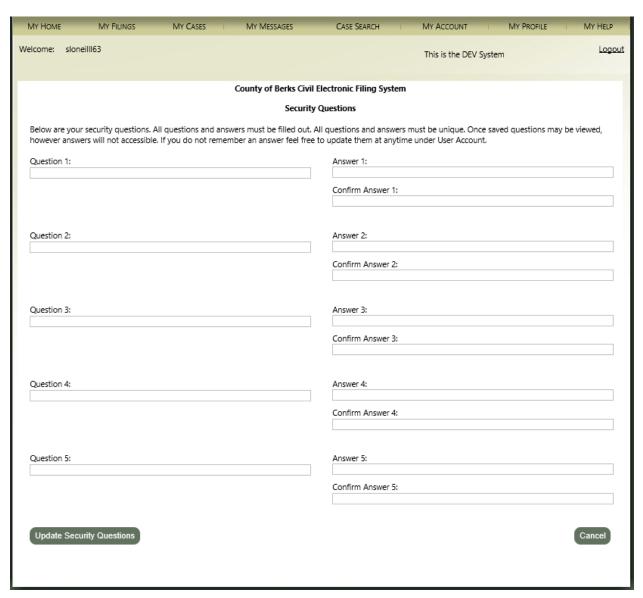
Register For an E-Filing Account.

Enter a User Name & I	Email Address Below.	
a User Name:	*	
b E-mail: [*	
Confirm E-mail:	*	
Enter Your Sta	ate ID Below.	
c PA Attorney ID:	*	
Confirm PA Attorney ID:	*	
Enter Your Pass Minimum Requireme 8 Characte 1 Non-Alphanumeric Chara 1 Uppercase 1 Nun	ents For Password: er Length acter (e.g. @, #, \$, %, &, *) e Character	
d Password: [*	
Confirm Password:	*	
Enter Security Code In Parallel Security Code: Begin for Registration Frame of Registration Frame of Registration Parallel Security Code: [Frame of Registration Frame of Registra	nD O	

- a. User Name The filer must create a username. The EFS system requires that a username only be used by one registered user. If you receive a message that the User Name is already in use enter another User Name. The username must be a minimum of 3 alphanumeric characters.
- Email address The registration email address is the email address of the person registering for an eFiling account. It is important the user remembers what email address was used to register for an eFiling account. This email address is used to recover forgotten User Names and Passwords.
- c. State ID Only attorneys licensed to practice in Pennsylvania can register during the initial phase of eFiling. They must supply their Attorney State ID. The ID number is validated by the Prothonotary before registration is approved.
- d. Password The password must be a minimum of 8 characters in length. For security purposes the user name cannot be part of the password. It needs to contain a minimum of 1 special character (non-alphanumeric), 1 Uppercase Letter, and 1 number.
- e. Passwords must change every ninety (90) days and must be different than the last ten (10) passwords used.
- f. Security Code Enter the security code exactly as you see it in the security box. If you have difficulty reading the security code, you can select the refresh icon next to the Security Code box.
- g. Once the filer submits the registration they receive an email (sent to the registration email address) directing the filer:
 - a. Select the link or
 - b. Cut and Paste the link into to their browser
 - c. This takes the filer to a page to confirm their registration
- h. Once the registration is confirmed, the filer can log into the system using the registered User Name and Password.
- i. The first time the user logs into the system the "My Profile" page is displayed. The filer can make changes to their profile information. They are required to confirm the changes to the profile.
- j. If the registration is rejected, the system deletes the registration and any documents that have been filed under that User Name. It is recommended that the user wait to receive notification that their registration has been accepted before they begin eFiling.

Security Questions and Password Recovery

1. When a user logs on to the system, if they have not changed their password recently or their security questions are blank, the security questions screen appears.

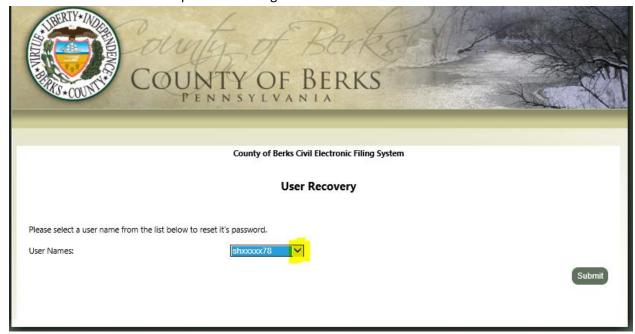


- 2. Security question requirments are:
 - a. Answer must be longer than five (5) characters.
 - b. Questions must be different.
 - c. Users will not be able to view their answer.
- 3. Registered user who cannot remember their user id must contact the Civil EFS Helpdesk for assistance.

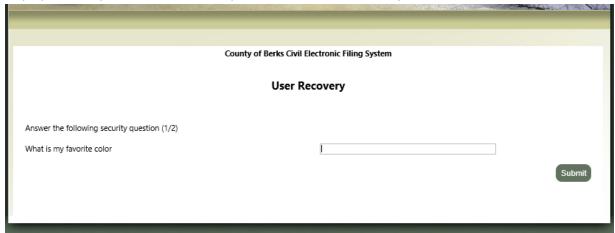
4. Registered users can recover their password by clicking on the Forgot Password link on the log in page. Once the link is clicked, the User Recovery screen appears. Then enter the e-filing registration email address and click on the Submit button.



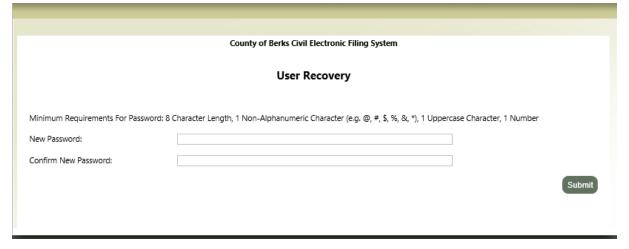
5. If the user has mulitple EFS accounts associated with the registration email address, a screen allowing the user to select which account to recover will appear. Click on the drop down arrow to select the account for the password change.



6. The user will need to provide answers to two (2) of the five (5) security questions. Questions are displayed one by one and the answer provided must match exactly.



7. Once both questions are answered successfully, the password change screen will appear.

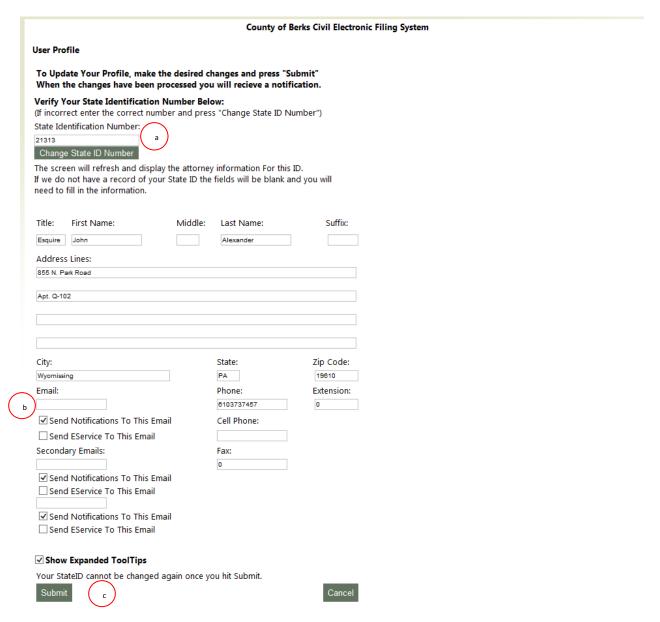


8. Enter your new password and click on the Submit button. A successful password change screen message appears for a few seconds and then the log in screen will appear.



My Profile

1. When a filer initially logs on to the system after their registration is accepted, they are directed to the *My Profile* page. This page is always available by clicking on the *My Profile* tab.



- a. The first time a filer accesses their profile, they can change their attorney state ID number. This is the only time this option is available.
- b. The filer can enter up to three email addresses. There is the initial email that is entered during the registration process. There are also two available fields to enter secondary email address. Any address listed with the *Send Notification to this Email* box checked, receives efiling

notification emails from the EFS system. Any email address listed with the *Send EService to this Email* will receive email service as opposed to receiving service through postal mail.

c. Click the Submit button to save any profile changes.

Filer Dashboard - Overview

Once logged into the system, the filer will see the Dashboard of options available to them. The options allow the user to manage their filings. They can also manage their eFiling account and their attorney profile. The screen displayed once the filer is logged in is the *My Home* tab. This tab is used to display any outage information or other communications to the registered filer.



Filer Dashboard - Navigation

a. *My Filings* tab page is where a new case is started. A filer can submit subsequent filings against an existing case or they can check the status of any draft or submitted filings.



- a. If the client wishes to close their session select the Logout link (a) (see above)
- b. To file a subsequent filing (to a case that has been previously filed with the Prothonotary) enter the *Existing Case* number and select the *Create* button
- c. To file a new case with the Prothonotary, select the *New Case Create* button
 - i. The My Filings Tab shows any filings that are started or submitted to the Prothonotary's Office.
 - ii. To search within the *My Filing* tab enter text in the *Looking For* field and press the enter key. For example if Custody or custody is entered, the system returns only your Custody filings.

- iii. If there is a long list of filings in the *My Filings* queue, it can be sorted by selecting the column heading. For example if Filing Type is selected, it will group like filing types together.
- d. To search for a filing in the My Filings tab enter the search criteria in the *Looking For* search box d and press enter. The *My Filings* page then only displays filings that meet the search criteria.

My Filings



a. Once a filing is created, it is displayed in the *My Filings (Work in Progress)* grid. It will remain in this grid until the filing has been accepted by the Prothonotary. Once a filing is accepted, it is no longer displayed in the grid, it is now displayed in the *My Cases* tab.

When the filing is submitted to the Prothonotary, there is a two-step approval process.

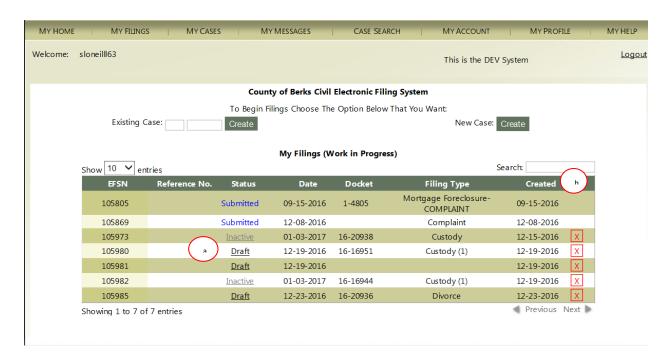
Step 1: The filing is reviewed for completeness and accuracy. If the filing is accepted, the PayPal account is charged.

If the filing is rejected, Prothonotary's Office will indicate a reason why it is rejected. An email is sent to the filer. The PayPal account is not charged. The status of the filing in the My Filings queue is marked as rejected.

Step 2: When the filing is accepted by Prothonotary, it will be saved to the Civil Case Management System (Civil CMS) with a *Not Verified* status. The Prothonotary's office

will refine the docket entries at this point and then change the case status. The time-stamped filing will then be available for viewing in the appropriate index.

b. If a filing that is in a *Draft* or *Rejected* status has been in *My Filings* for over two weeks, the status is changed to *Inactive*. If the status remains Inactive for over two weeks, the filing is deleted from the *My Filings* screen. To reactivate a filing, please send an email to CivilEFS@countyofberks.com. Please be sure to include the EFSN number of the filing that needs reactivation.

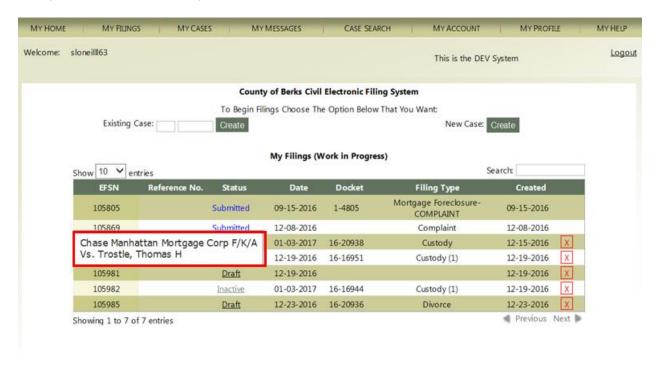


- c. The statuses that will show in this grid include:
 - a. Draft The filer has started a new or subsequent filing. The actions that a filer can take on a draft filing include:
 - i. Edit by selecting the *Draft* link (^a)
 - ii. Delete the filing by pressing the red x found at the end of the row (next to the *Created* date.
 - b. Submitted The filing has been submitted to the Prothonotary no changes can be made to the filing in this status.
 - c. Rejected Prothonotary has rejected the filing with the reason for the rejection. If the *Rejected* link is selected, the filer can edit the filing and resubmit the filing.
 - d. *Inactive* The filing has been inactive for over two weeks. If the filing is not reactivated, it will be deleted after it has been inactive for two weeks.

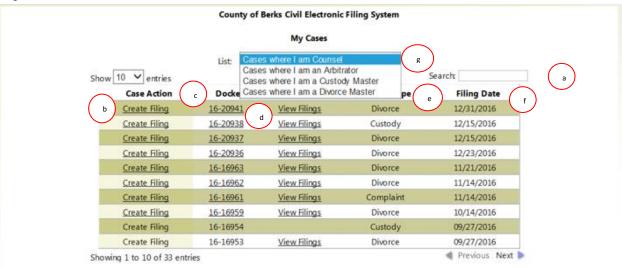
Hint: If you forget what the status means, you can hover (hold the cursor) over the status and the system will display the definition. See the example below:



Hint: To display the primary plaintiff and defendant in a filing, the filer can hover over any of the fields (except Status). See the example below:



My Cases tab



- 1. This section provides a history of all Civil/Family cases where the attorney has been counsel of record, an arbitrator, custody master, or a divorce master. The attorney can click on the drop down arrow to select the type of cases to be displayed g. Only those filings that have been assigned a docket number are displayed in the My Cases grid.
 - a. The filer will be able to search for cases in the *My Cases* grid (a) The filer can search by docket numbers, specific filing types, and party names. This is accomplished by entering the appropriate information in the *Looking For* box (a) and pressing the enter key.
 - b. The user can also sort on several of the column headings (Select (*Docket*) (c), (*Filing Type*) e or (Filing *Date*) f). This will allow the user to view the grid in the sequence they find most useful.
 - c. Once the filer has found the case they are looking for, they can create a filing by selecting the *Create Filing* button for that docket number in the first column (b *Case Action*).
 - d. The Lookup Civil Case button allows the filer to search for other cases.

	County of Berks Civil Electronic Filing System								
My Cases									
List: Cases where I am Counsel									
Show 10 v entries Search:									
	Case Action	c Docket	Filings (d)	Filing Type	Filing Date				
	Create Filing	<u>16-20941</u>	<u>View Filings</u>	Divorce	12/31/2016				
	Create Filing	<u>16-20938</u>	<u>View Filings</u>	Custody	12/15/2016				
	<u>Create Filing</u>	<u>16-20937</u>	<u>View Filings</u>	Divorce	12/15/2016				
	Create Filing	<u>16-20936</u>	<u>View Filings</u>	Divorce	12/23/2016				
	Create Filing	<u>16-16963</u>	<u>View Filings</u>	Divorce	11/21/2016				
	Create Filing	<u>16-16962</u>	<u>View Filings</u>	Divorce	11/14/2016				
	Create Filing	<u>16-16961</u>	<u>View Filings</u>	Complaint	11/14/2016				
	Create Filing	<u>16-16959</u>	<u>View Filings</u>	Divorce	10/14/2016				
	Create Filing	16-16954		Custody	09/27/2016				
	Create Filing	16-16953	<u>View Filings</u>	Divorce	09/27/2016				
Sh	owing 1 to 10 of 33 entr	ries			Previous Next				

- 2. The *Docket* column callows the filer to view the case in the Civil Case Management System (Civil CMS).
 - a. When the case has been added to CMS, the entries in the Docket column will initially not show as a hyperlink. Once the filing is verified in CMS, it is available for viewing in the CMS Indexes. The docket number in this column will then be shown as a hyperlink and the filer can view the case in the CMS Indexes.
 - i. If the link is active, it means the filing is in a *Pending* status and is available in the CMS indices.
 - ii. If the link is not active, it means the filing has a *Not Verified* status and cannot be viewed on the indices at this time.
 - b. If there is an entry in the *Filings* column do for a case, it will contain a link to the history of any filings that were submitted using the EFS system.

Case Search tab

County of Berks Civil Electronic Filing System

Search for a Case



 The Case Search tab allows the filer to search for civil cases. Filers can enter either a case number or a party name. Search is started by typing in a docket number or party name and pressing enter. Filers can also enter the information and click the Search button. To start a new search, the clear button should be clicked.

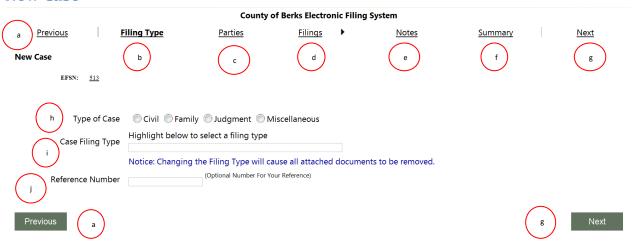


- 2. The system displays search results for a specific case.
 - a. If documents are available, the user can click on the underlined select.
 - b. The docket summary report can be viewed by clicking on the report button next to docket summary.
 - c. The cost ledger report can be viewed by clicking on the report button next to cost ledger.
 - d. To launch a new search, click the Return to Case Search button.

	Docket A Number	Date Filed	Case Type	Matching Name	\$ Caption Plaintiff	\$	Caption Defendant	Status
Select	00-10097	10/10/2000	Mortgage Foreclosure- COMPLAINT	SMITH, KATHY (Defendant)	CHASE MANHATTAN MORTGAGE CORPORATION		SMITH, KATHY L	Finished
Select	00-10097	11/29/2000	Default Judgment	SMITH, KATHY (Defendant)	CHASE MANHATTAN MORTGAGE CORPORATION		SMITH, KATHY L	Finished
Select	00-10097	11/29/2000	Execution	SMITH, KATHY (Defendant)	CHASE MANHATTAN MORTGAGE CORPORATION		SMITH, KATHY L	Finished
Select	03-3051	03/19/2003	Ejectment-COMPLAINT For Possession of:	SMITH, KATHY (Defendant)	FEDERAL NATIONAL MORTGAGE ASSOCIATION		OCCUPANTS	Finished
Showing	1 to 4 of 4 entries				(b	Previous 1	Next

- 3. If a name is entered, a screen with a list of all matching names will appear.
 - a. The filer can select a specific case by click on the Select button to display detailed case information.
 - b. There are Previous and Next buttons if the search returns more than one page of matches.
 - c. Once the filer returns from viewing the detail for the case, the search results list will be displayed again. To start a new search, the filer must click on the Clear button.

New Case

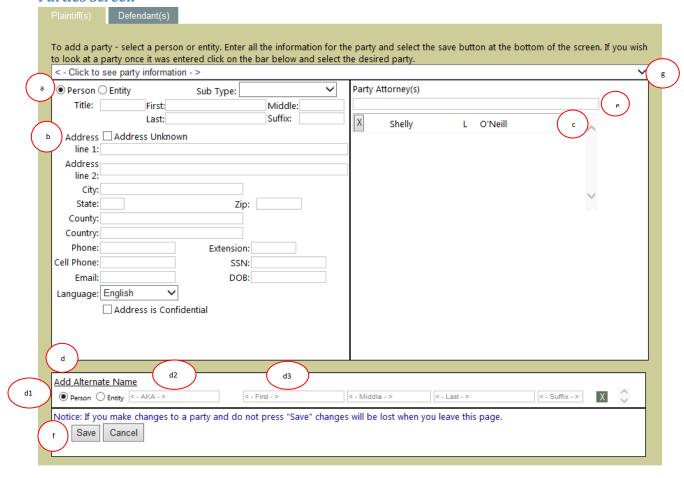


- a. To navigate to a previous screen while filing a new case, select either the *Previous* button in the navigation bar at the top left or bottom right.
- b. The *Filing Type* page is the first page displayed after the Create button is selected. There are 5 pages that you will navigate to complete a new filing. Once you have started work on a case, it will show in the *My Filings (Work in Progress)* page.
- c. The *Parties* screen is where the filer will enter information about the Plaintiff(s) and Defendant(s) in the case.
- d. The Filings screen is where the filer will enter all the appropriate filings for the case (i.e., Complaint, Entry of Appearance, etc.).
- e. The *Notes* screen is where any special information about the case that the filer wishes to communicate to the Prothonotary office is entered.
- f. The *Summary* screen contains a PDF E-Filing Summary report that the filer can review before they submit the filing.
- g. To navigate to the next screen while filing a new case, select the *Next* button in the navigation bar at either the top right or bottom right.
- h. The filer must select the appropriate case type from the *Type of Case*. The valid case types are:
 - i. Civil
 - ii. Family
 - iii. Judgment
 - iv. Miscellaneous
 - 1. Auditor's Report
 - 2. Certificate of Authority re Insurance Companies
 - 3. Dissolution of a Corporation
 - 4. Issue Subpoena
 - 5. Notice to Resume Surname

6. Recording

- i. A list of the valid case filing types will be displayed once you put the cursor in the box for *Case Filing Type*. Select the appropriate filing type for the case type you are filing.
- j. The *Reference Number* is for the filer's use and will be displayed on EFS screens and reports for the filing.

Parties Screen

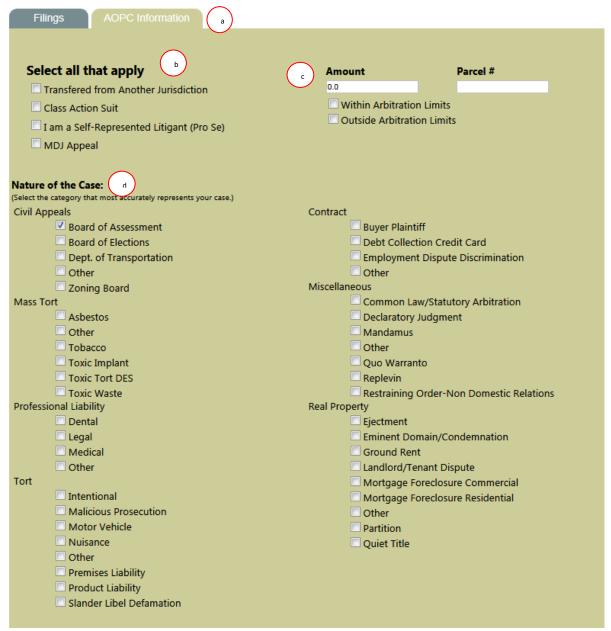


This section contains information about adding Plaintiff and Defendant information for the new case.

- a. If the Plaintiff or Defendant is a corporation or some other type of organization, select the *Entity* radio button. If it is a person, make sure the *Person* radio button is selected so you can enter the person's first and last name.
- b. Enter as much information about the party as possible. The name for the Plaintiff or Defendant is required. If you do not know the address, please select the *Address Unknown* check box. If the address information is left blank, you will receive the error message *Insufficient Information to Create Party*.

- c. The system will automatically assign the attorney that is filing as the attorney for the plaintiff. If this is incorrect, the attorney can be selected by clicking on the "X" next to the name.
- d. If the party has alternate names that must be include in the filing, select the *Add Alternate*Name button and you can add the necessary name(s).
 - 1. Select Person or Entity
 - 2. Put your cursor in the box to see a list of the Alternate Names See Appendix A for a list of the alternate name types.
 - **3.** Type in the Alternate Name. If Person is selected, there are separate fields for the first name, middle name, last name and suffix. If Entity is selected, there is one field for entity name. Note: make sure you press the save key before leaving the party screen.
- e. If there are other attorneys (co-counsel), they can be added in the right column. Note: to add other attorneys to a case, they must be registered EFS users.
- f. Once the party information is added, make sure the *Save* button is selected. If not, your information will be lost. Note: when the party is saved, the party screen is automatically cleared so you can enter a second Plaintiff or Defendant.
- g. If the filer needs to return to the party, select the drop-down option and select the party that you wish to view and update. This screen is populated with the party information so you can make changes. You can only change parties that have not been submitted to the Prothonotary. Once the case has been filed, it will be necessary to submit a change of address or to make a request to change the caption if the information needs correction. Note: once the filing is submitted and accepted, any address change must be submitted to the Prothonotary who will make the change on the docket. Changes to a caption must be done according to Pa Rules of Civil Procedure.

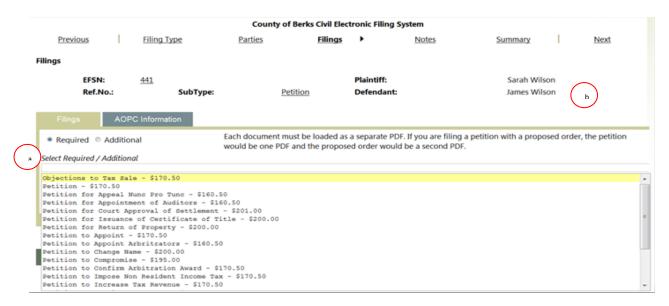
Filings Cover Sheet (Civil Case)



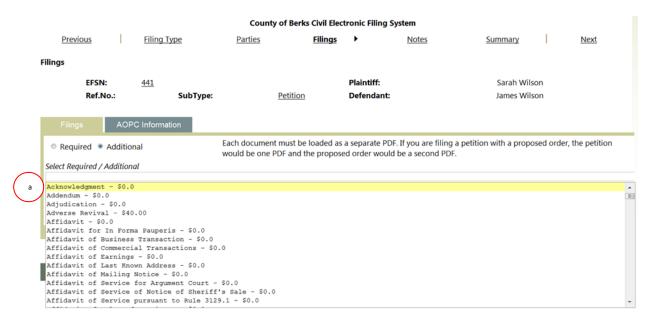
- a. The Civil Cover Sheet and the Family Cover Sheet are no longer required. The AOPC tab is an electronic version of the Civil Cover Sheet.
- b. The Cover Sheet Questions are optional select any that apply
- c. Enter the amount, parcel # and arbitration questions as appropriate
- d. In this section, select the type of civil case being filed. Once you have selected all the appropriate information for the cover sheet, press the *Next* button found at the bottom of the screen.

Filings

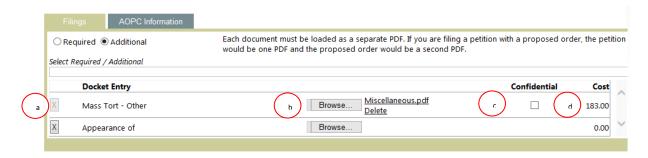
One of the features of the Filing screen is the **Auto Search capability** available in the **Select Required/Additional** field. You begin typing and a list of filings that match what is typed is displayed. The more characters entered reduces the number of choices that appear. For instance, if a filer types the letter "t" any template containing the letter "t" is displayed. Entering a "to" returns any template containing the letters "to". Entering "torte" reduces the list even further.



- a. To load your Initial Case Filing, place the cursor in the box below the "Required" radio buttons and start typing. The list of filings that match what is typed is displayed. Select the description that matches your filing and double click. This adds the filing.
- b. Once the parties are entered, the primary defendant and primary plaintiff is displayed in the heading of the draft filing being worked on.

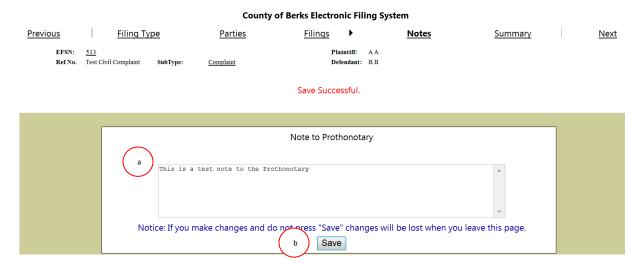


a. Select the Additional radio button and place the cursor in the box below. Start typing and a list of additional filings is displayed. For example, entering "Appear" displays 3 filing entries containing the word "Appearance". Select the description that matches your filing and double click. This now adds the additional filing ---- see below.



- a. In this example a Required filing of *Mass Tort Other* and an Additional filing of *Appearance of* is selected.
- b. Select the *Browse* button to upload the appropriate PDF file for the filing. Note: Any Docket Entry that shows the *Browse* button must have a PDF file uploaded before the filing can be submitted.
- c. Once a document is uploaded, the Confidential checkbox appears allowing filers to indicate if the document is confidential.
- d. The Prothonotary cost for the filing is displayed in the Cost column. eFiling fees are added once the filing is completed.

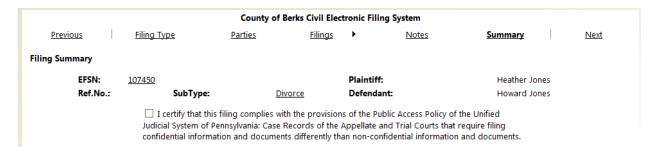
Notes



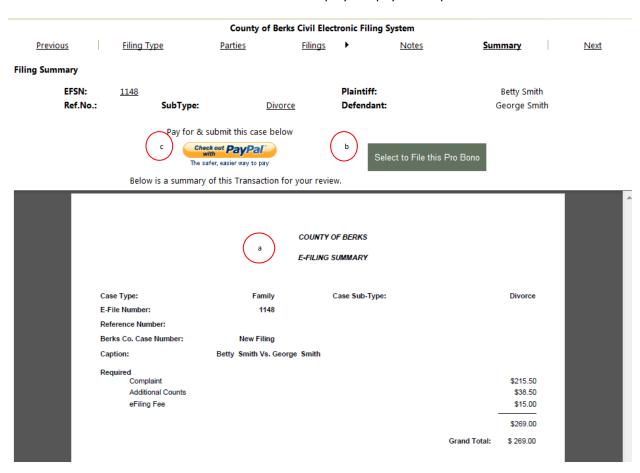
- a. If you need to send any additional information about the filing, type a note in this box.
- b. Press Save or the Next button to ensure the note is saved.

Summary

When the summary screen initially appears, a statement certifying that the eFiling complies with the Unified Public Access policy is displayed.



The filer must click the checkbox for the screen to display the payment options available.



- a. E-Filing Summary the filer can review the filing and see their associated fees. This can be saved or printed. Note: the eFiling fee is listed and added to the total.
- b. If the filing is Pro Bono then click on the *Submit to Prothonotary* button to send it directly to Prothonotary.
- c. If the filing is not Pro Bono, select the *Check out with PayPa*l button to process the payment transaction and submit the filing to Prothonotary.

Subsequent Filing

Filing Type

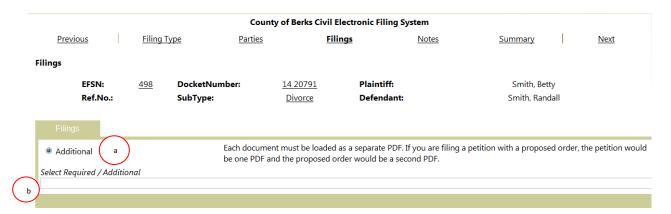


- a. The navigation for a Subsequent Filing is like new filings. When a valid Docket Number is entered, the heading contains the case SubType and the primary Plaintiff and Defendant in the case.
- b. The Case Filing Type cannot be changed. However, for an older Family case that had multiple case ID numbers, the filer can pick the appropriate filing type --- Divorce or Custody. Note: A limited number of documents can be e-filed for Protection from Abuse cases.
- c. The *Reference Number* is for the filer's internal use and is displayed on EFS screens and reports for the filing. This information is not submitted to the Prothonotary.

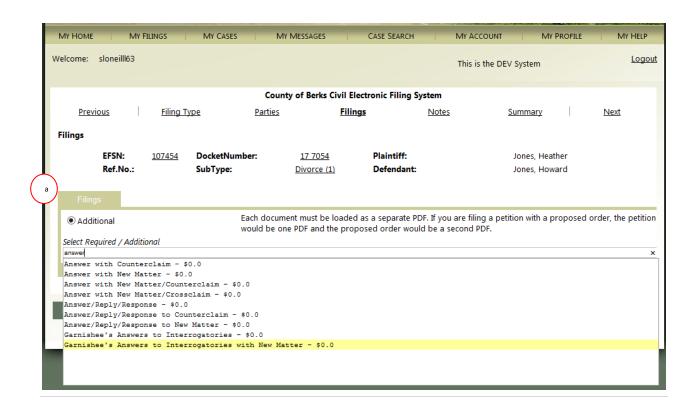
Parties

Any additional parties or attorneys that need to be added to a case will be assigned by the Prothontary staff.

Filings



- Select the Additional filings radio button. The Additional button allows the filer to select the specific filings for this subsequent filing. Each filing requires that a separate document (PDF) is uploaded.
- b. When the filer places the cursor in the box below the *Select Required/Additional* heading and starts typing a description of the pleading (such as" Answer with New Matter"), a list of possible filing descriptions appears. All descriptions matching what was typed is displayed. The more that is typed narrows the list of selections available. The filer can select the description that best matches the pleading they are filing.



a. Select the desired filing. If additional pleadings are being filed, repeat the above process to enter the information for each additional filing.



- a. In this example, *Answer* is typed and then *Answer with New Matter* is selected. Then *Appear* is typed and *Entry/Withdraw of Appearance* is selected.
- b. Select *Browse* to search your computer drive or your network drive to upload the appropriate PDF file that supports this filing. Note: When the *Browse* button appears, the filing cannot be submitted without a PDF being uploaded. You cannot to advance to the next screen without loading a PDF.
- c. Once a document is uploaded, the Confidential checkbox appears allowing filers to indicate if the document is confidential.
- d. If there is a cost for the filing, it is displayed in the *Cost* column. In this example, there is no a cost for the filing. However, an eFiling fee is added when the filing is completed.

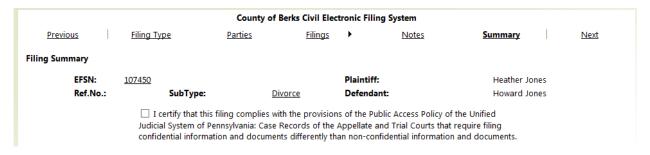
Notes



- a. Enter an appropriate note that relates to this filing.
- b. Press Save to ensure the note was saved.

Summary

When the summary screen initially appears, a statement certifying that the eFiling complies with the Unified Public Access policy is displayed.



The filer must click the checkbox for the screen to display the payment options available.



- a. The *Summary* appears before submitting your filings to PayPal for payment. Select the *Check out with PayPal* button to process the payment transaction. Once the payment transaction is completed, the screen returns to EFS and the Submit to Prothonotary button is clicked to complete the submission.
- b. If your filing is being done as Pro Bono, you will bypass PayPal by clicking on the *Submit to Prothonotary* button. The filing is sent to Prothonotary for review and acceptance.
- c. The above *Summary* can be printed or saved for your records.

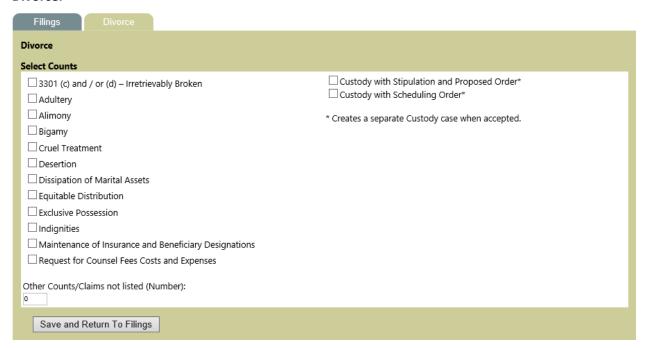
Family Cases

If you are filing Family cases one of the following screens will appear instead of the AOPC Information tab.

Custody:



Divorce:



Old Family Cases

In the past cases were designated by a unique id number in addition to the case number. When a subsequent filing is done for one of the older cases, the different case filing types with the id number will be displayed.

County of Berks Civil Electronic Filing System					
<u>Previous</u> <u>F</u>	iling Type Par	rties <u>Filing</u>	s <u>Notes</u>	Summary	Next
Subsequent Filing on an Existing Case					
EFSN: <u>13</u> Ref.No.:	DocketNumber: SubType:	10 292 Divorce-COMPLAINT	Plaintiff: Defendant:	Rogers, Kimberly A Rogers, Brian W	
Type of Case Civil Family Judgment Miscellaneous Click below to select a filing type (Abuse cases cannot be filed electronically)					
Case Filing Type Custody-COMPLAINT with Proposed Order (2) Custody-COMPLAINT with Proposed Order (4) Custody (5)					
Notice: Changing the Filing Type will cause all attached documents to be removed. Reference Number Optional Number For Your Reference)					

Only one button (a) can be selected when entering a subsequent filing for these cases. The old id number is listed behind the case filing type in parenthesis.

Emails

Throughout the filing process the filer will receive emails indicating the status of their filing.

Filing Received

After the filer submits their filing to the Prothonotary Office, an email is sent indicating their filing has been received.

For new filings, the filer receives the following email:

```
From: noreply@countyofberks.com [mailto:noreply@countyofberks.com]
Sent: Monday, August 18, 2014 4:37 PM
To: Hanson, James
            b) 1340 has been Received by the County of Berks Prothonotary
Subject: Ef
Eric Smith
Please do not reply to this automated email address.
Your Filing (EFSN: 1340) been Received by the County of Berks Prothonotary.
   Caption: aaa bbb Vs. cd
   Docket Number: New
   Case Type: Family
   Case SubType: Divorce
   Custody From Divorce:
   Docket Number: 00
   Case Type: Family
   Case SubType: Custody
   Required Filings:
      Complaint
      eFiling Fee
      Divorce - Custody Count Complaint
   Additional Filings:
         Additional Counts
         Proposed Custody Scheduling Order
        Mediation
Total Filing Cost: 506.50
Message:
```

- a. The email contains the EFSN number assigned to the filing.
 - b. The attorney's name that submitted the filing is in the email.
 - c. There is no docket number because it is a new filing.
 - d. Since the filing has just been received, no one in the Prothonotary Office is assigned to the filing.

Office of Prothonotary

Subsequent Filings

For subsequent filings, the filer receives the following email:

From: noreply@countyofberks.com [mailto:noreply@countyofberks.com]

Sent: Tuesday, August 19, 2014 7:39 AM

To: Hanson, James

Subject: EFSN: 1344 has been Received by the County of Berks Prothonotary

Eric Smith (b)

Please do not reply to this automated email address.

Your Filing (EFSN: 1344) has been Received by the County of Berks Prothonotary. Caption: First Commonwealth Federal Credit Union Vs. Agosto-Lopez, Hector W

Docket Number: 14 4321 Case Type: Civil

Case SubType: Complaint

Required Filings: eFiling Fee Additional Filings:

Answer/Reply/Response Statement Affidavit Proposed Order

Total Filing Cost: 8.00

Message:

- (d) Office of Prothonotary
 - a. The email contains the EFSN number assigned to the filing.
 - b. The attorney's name that submitted the filing is included.
 - c. The docket number of the subsequent filing is included.
 - d. Since the filing has just been received, no one in the Prothonotary Office is assigned to the filing.

Filing Accepted

Once a filing is accepted by the Prothonotary, the filer receives an email. For new filings, a case number is assigned. At this point the filing is in a *Not Verified* status. This means that the filer can see their filing in the *My Cases* page in EFS. For subsequent filings, the acceptance email contains separate links to all the documents filed. The filer can select which document to view. If the filer is logged into the system, it will take them directly to the document. If the filer is not logged into the system, the filer is directed to the log in page.

New Filing Acceptance Email:

```
From: noreply@countyofberks.com [mailto:noreply@countyofberks.com]
Sent: Monday, August 18, 2014 4:38 PM
To: Hanson, James
Subject: E-Filing Acceptance For EFSN: 1340
Eric Smith
Please do not reply to this automated email address.
If you have questions please see the Deputy Prothonotary contact information below.
Your Filing (EFSN: 1340) has been Accepted by the County of Berks Prothonotary.
   Caption: aaa bbb Vs. ccc bbb
   Docket Number: 14 14632
   Case Type: Family
   Case SubType: Divorce
   Required Filings:
      Complaint
   Additional Filings:
     Accepted:
         Additional Counts
         eFiling Fee
     Rejected:
Total Filing Cost: 394.00
Message:
```

- a. The email contains the EFSN number assigned to the filing.
- b. The attorney's name that submitted the filing is included.
- c. The docket number of the new filing is included.
- d. Since the filing is accepted, the email will contain the name and contact information of the deputy that accepted the filing.

Jim Hanson

Deputy Prothonotary Phone Number

jhanson@countyofberks.com

Subsequent Filings - Acceptance Email

From: noreply@countyofberks.com [mailto:noreply@countyofberks.com] Sent: Tuesday, August 19, 2014 7:46 AM To: Hanson, James Subject: E-Filing Acceptance For EFSN: 1344 Eric Smith Please do not reply to this automated email address. If you have questions please see the Deputy Prothonotary contact information below. Your Filing (EFSN: 1344) has been Accepted by the County of Berks Prothonotary. Caption: First Commonwealth Federal Credit Union Vs. Agosto-Lopez, Hector W Docket Number: 14 4321 Case Type: Civil Case SubType: Complaint Required Filings: Additional Filings: Accepted: Answer/Reply/Response Statement Affidavit Proposed Order eFiling Fee Rejected: Total Filing Cost: 8.00 Message:

- a. The email contains the EFSN number assigned to the filing.
- b. The attorney's name that submitted the filing is included.
- c. The docket number of the subsequent filing is included.
- d. Since the filing is accepted, the email will contain the name and contact information of the deputy that accepted the filing.
- e. Links to allow the filer to view the documents.

Jim Hanson

Deputy Prothonotary Phone Number

jhanson@countyofberks.com

New Filing - Verified

Once a filing is accepted, the Prothonotary Office must process the filing before the filing changes from a *Not Verified* status to a *Pending* Status. The process can include assigning a judge, researching related cases, or tweaking the docket entries. Once the filing status changes to a *Pending* status, the filer receives an email. For new filings, a separate email will be sent to the filer indicating the filing is processed. The email will contain a link to the *My Cases* page. For subsequent filings, the acceptance email contains separate links to all the documents filed. If the filer is logged into the system, it will automatically go to the page. If the filer is not logged into the system, the filer is prompted to log into the system.

Email for New Filings:

From: noreply@countyofberks.com [mailto:noreply@countyofberks.com]

Sent: Monday, August 18, 2014 4:34 PM

To: Hanson, James

a Subject: E-Filing For EFSN: 1309

Eric Smith (b

Please do not reply to this automated email address.

\ If you have questions please see the contact information below.

Your Filing (EFSN: 1309) has been processed by the County of Berks Prothonotary.

Caption: Acme Mortgage Company Vs. Andrew Jones

Docket Number: 14 14628

Case Type: Case SubType:

Go To My Cases

Office of Prothonotary
CivilEFS@countyofberks.com
610.898.5565

- a. The email contains the EFSN number assigned to the filing.
- b. The attorney's name that submitted the filing is included.
- c. The docket number of the subsequent filing is included.
- d. This link will either be to the *My Cases* page or to the document. If the link is not working, please contact your IT Support.

Filing Rejected

If the filing is rejected, the filer receives an email with information on why the filing was rejected. The email will contain the reason the filing was rejected and the contact information of the deputy who rejected the filing.

From: noreply@countyofberks.com [mailto:noreply@countyofberks.com]

Sent: Tuesday, August 19, 2014 11:20 AM

To: Hanson, James

Subject: E-Filing Rejection For EFSN: 1342

Eric Smith (b)

Please do not reply to this automated email address.

If you have questions please see the Deputy Prothonotary contact information below.

Your Filing (EFSN: 1342) has been Rejected by the County of Berks Prothonotary.

Caption: Smith, Bobbi Vs. Smith, Robert

Docket Number: 14 14630

Case Type: Family

Case SubType: Divorce (1)

Required Filings: Additional Filings: Accepted: Rejected:

Total Filing Cost: 166.50

Message: Other: Test Rejection Email

(c

Jim Hanson

Deputy Prothonotary

Phone Number

jhanson@countyofberks.com

- a. The email contains the EFSN number assigned to the filing.
- b. The attorney's name that submitted the filing is included.
- c. Message as to why the filing was rejected.
- d. The contact information for the deputy that rejected.

Documents Filed by Courts

When the Courts file a document, they can select who receives the email notification. The system prechecks all attorneys when the Courts create the distribution list.

From: noreply@countyofberks.com
Sent: Monday, June 26, 2017 2:31 PM

To: O'Neill, Shelly

Subject: Filing Update for 17 6708

An Order/Decree which requires notice pursuant to Pa. R.C.P. 236 has been entered by the Court in the following matter:

Caption: MICKEY MOUSE vs. MINNIE MOUSE

Docket Number: 17 6708 Case Type: Family Case SubType: Divorce

Date of Entry on Docket: 6/26/2017

Filing:

Proposed Order

Filing can be viewed through EFS in the 'My Cases' tab where you are listed as the attorney of record. Otherwise please review through your normal means of accessing the information.

Please do not reply to this automated email address.

If you have questions, please contact the CivilEFS Helpdesk at either CivilEFS@countyofberks.com or (610) 898-5565.

Thank you,

Berks County Prothonotary Office

Opposing Counsel Notifications

Attorneys can receive notifications of documents filed by opposing council when they are signed up to receive EFS notices.

From: noreply@countyofberks.com
Sent: Monday, June 26, 2017 2:31 PM

To: O'Neill, Shelly

Subject: Filing Update for 17 6708

An Order/Decree which requires notice pursuant to Pa. R.C.P. 236 has been entered by the Court in the following matter:

Caption: MICKEY MOUSE vs. MINNIE MOUSE

Docket Number: 17 6708 Case Type: Family Case SubType: Divorce

Date of Entry on Docket: 6/26/2017

Filing:

Proposed Order

Filing can be viewed through EFS in the 'My Cases' tab where you are listed as the attorney of record. Otherwise please review through your normal means of accessing the information.

Please do not reply to this automated email address.

If you have questions, please contact the CivilEFS Helpdesk at either CivilEFS@countyofberks.com or (610) 898-5565.

Thank you,

Berks County Prothonotary Office

.

Appendix A - Alternate Name Types and Definition

1. Alternate Name Types

AKA Also Known As

AKA or DBA Also Known As or Doing Business As

DBA Doing Business As

Division of

FKA Formally Known As

Formerly

IDBA Individually Doing Business As

ITA Individually Trading As

ITDBA Individually Trading and Doing Business As

KNA Known Now As TA Trading As

TA DBA and AKA Trading As, Doing Business As and Also Known As

TBA Trading Business As

TDBA Trading and Doing Business As