



**Register of Wills
Electronic Filing (eFiling)**

Electronic Filing (eFiling)

Paperless Solutions, Inc.

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	Register of Wills	Electronic Filing (eFiling)
	Electronic Filing (eFiling)	Paperless Solutions, Inc.

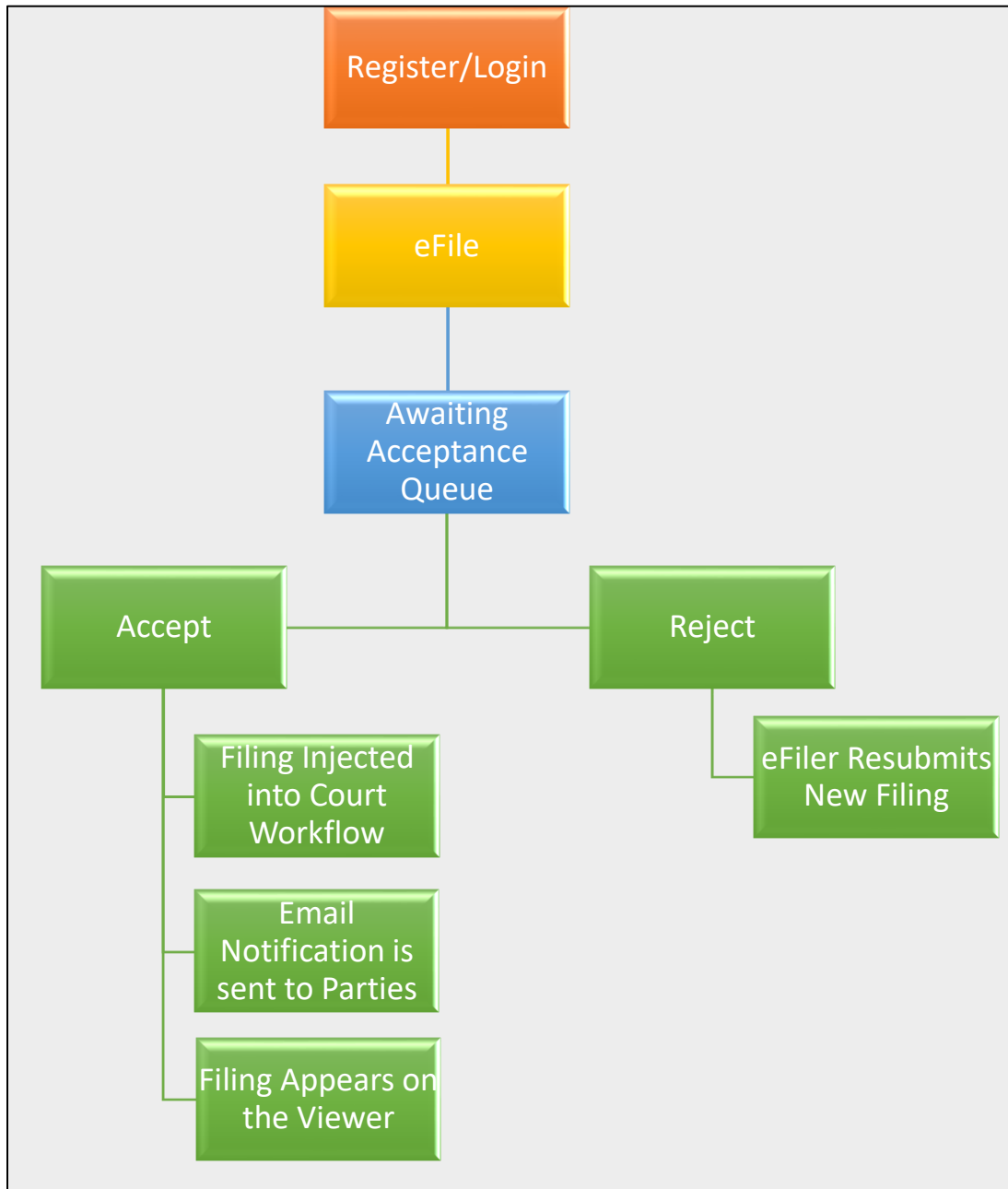
1 Introduction to the Paperless Electronic Filing System

The Paperless Electronic Filing System is a web-based eFiling application that allows electronic submission of filings for both attorneys and pro-se litigants. With eFiling, you have 24/7/365 days of the year online filing access. Access to documents on a case are virtually instant. You can browse through all your filed documents quickly and easily, without them taking up real estate in your office. eFiling allows you to file your documents without leaving your office, eliminating the need to travel to the Clerk's office or pay for postage. Receiving your documents more quickly also allows you to react faster to new developments on your case.

1.1 A Day in the Life

- The Filer prepares the document for filing and then uploads it into the eFiling system
- Filer enters payment via credit card (if applicable)
- The Clerk will review the incoming filings and either accept or reject them
- The filing will be entered on the docket immediately if accepted, or sent back if rejected
- The filer and other registered eFilers on the case will receive e-mail notifications when the filing is accepted
- The signature Webex will be scheduled - all original documents must be sent to and received by the County office before the scheduled signing date.
- Signatures will be taken for all parties and, when complete, signed documents will be made available.
- Attorneys on file will be able to get their one free look of signed documents from the Viewer.

2 eFiling Flow Chart



3 Register

At the Login screen, you will select “Register as a new user”

Login

Account Information

User name

Password

Remember me?

or [continue as guest](#)

[Forgot username or password](#)

[Register as new user](#)

You can register as an Attorney, or Pro-se. You must enter a valid email address that you must verify.

Register

Are you an attorney licensed in Pennsylvania?

Yes No

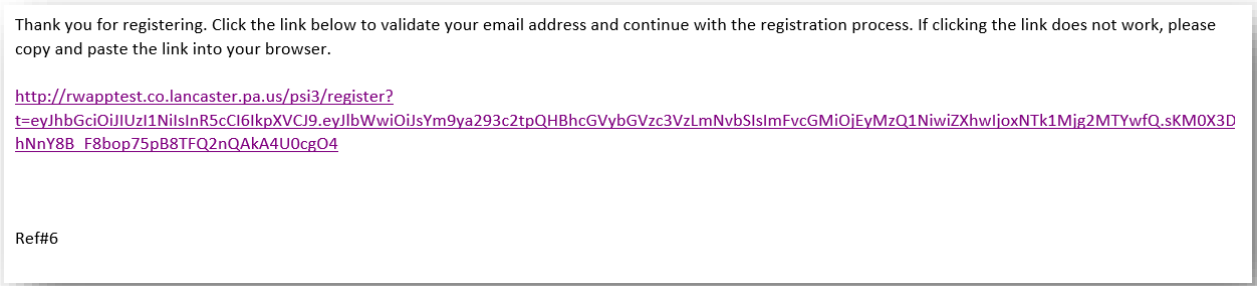
AOPC Number: 123456 [change](#)

Enter your email address below and an email will be sent with a validation code to verify your email address and continue the registration process.

Email Address

	Register of Wills Electronic Filing (eFiling)	Electronic Filing (eFiling)
		Paperless Solutions, Inc.

The validation email will contain a hyperlink.



When you click the hyperlink, you will be asked to set up your account with a username and password.

Register

Your email address has been verified. Enter a user name and password to finish.

AOPC Number: 123456
Email Address: lborkowski@paperlessus.com

User Name

Password

Confirm Password

Click Finish, and your account has been created.

4 Enable eFiling

Enter your username and password, and click Login.

Login

Account Information

User name

Password

Remember me?

or [continue as guest](#)

[Forgot username or password](#)

[Register as new user](#)

Confirm by entering your first and last name, and then click “Enable”

Account

Username: UserName [Change username](#) [Change password](#)

Contact Details

an attorney licensed in PA
 AOPC Number: 123456 [change](#)
 Name: JOHN DOE
 Firm:
 Address: 123 MAIN STREET
 CITY, PA 19191
 Phone:

Email Addresses

JohnDoe@email.com Primary Validated

 [Add email address](#)

E-Filing

5 Consent

You will be required to 'Consent' to receive all notifications from the Court via email. Each County and Department has their own "Consent" language. Once you have consented, you will no longer receive paper mail from the Court, that includes: Hearing Notices, Orders, etc.

Consent

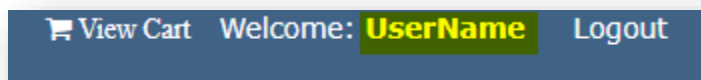
I hereby consent to receive any and all notifications from the Clerk of the Orphans' Court of Lancaster County via the email address provided in my user profile, pursuant to Pa. O.C. Rule 3.7. **This consent constitutes an acknowledgement that the Clerk and the Court may serve all notices via electronic means in accordance with Pa. O.C. Rule 3.7(i).**

Name:

AOPC#:

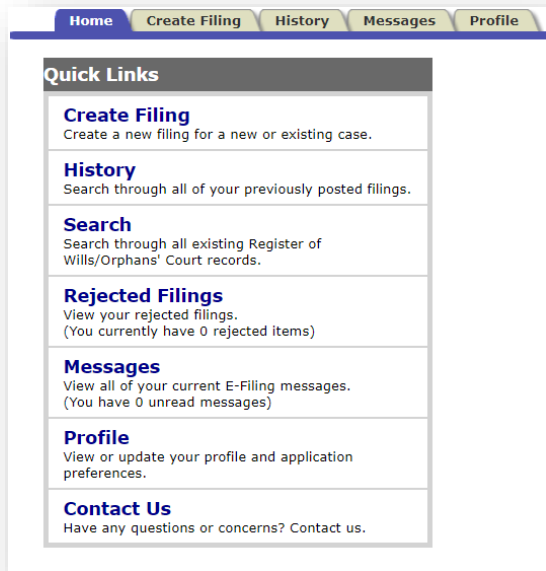
6 Login Status

Once you have consented, you will be able to Login. Always check the top right-hand corner of your screen to see your Login status. This Username is used for both eFiling and to view documents on the Viewer. To confirm you are logged in, you will see "Welcome:" and then your username.



7 eFiling Home Page

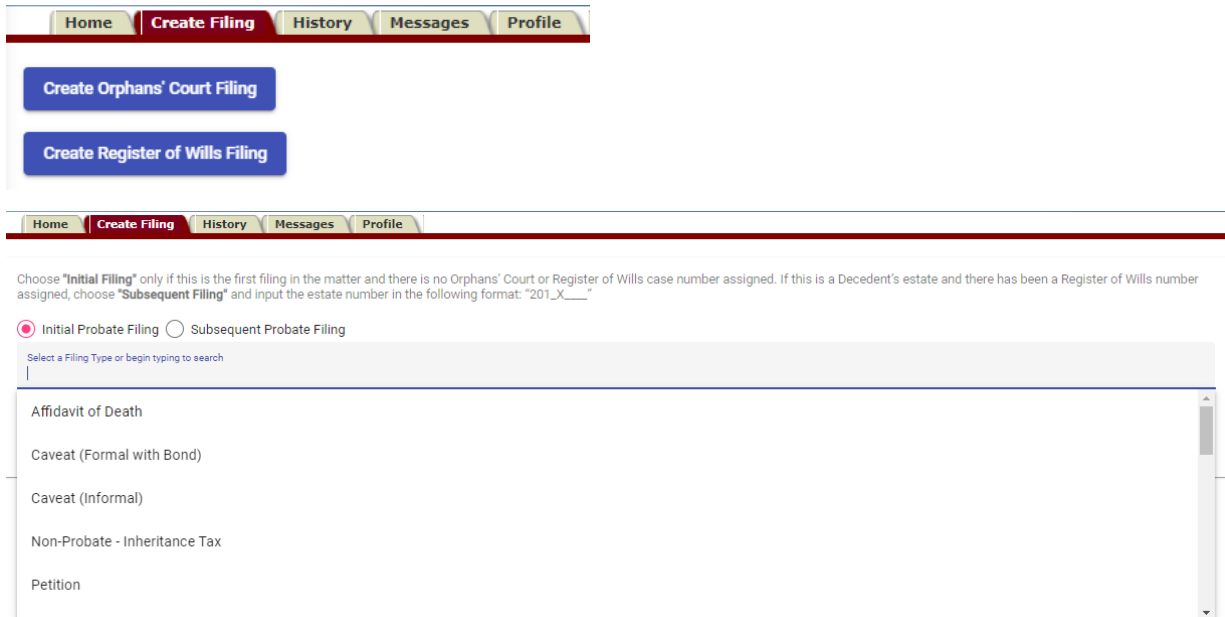
The home page allows the users accessibility to all the features of eFiling within one page.



7.1 Create Filing

This is where the user will create a new Filing on a case; both Initial and Subsequent.

Initial: You must select the Group and a Filing type to begin.



Each tab must be filled out before proceeding to the next tab. Important: Attorneys should add themselves to the party member(s) they represent in order to receive updates and to get their one free look of the completed documents.

New Case: Probate Initial Filing of Petition for Letters of Administration

Case Decedent Assets Parties Attachments Options

Probate case instructions

Select a Municipality *

Select a Probate Type *

Executor Note

Attachment Types have predetermined security settings based on the type.


New Case: Probate Initial Filing of Petition for Letters of Administration

Case Decedent Assets Parties Attachments Options

Only PDF attachments are accepted


Click to browse or drop files here for upload

GrantOfLettersPetition.docx



Test document

1 pages, 8.5 x 11



Main

Exhibit

Will

Codicil

Memorandum

Death Certificate

Any Short Certificates can be requested for purchase here. If none are requested, enter "0"

New Case: Probate Initial Filing of Petition for Letters of Administration

Case Decedent Assets Parties Attachments Options

Short Certificate Quantity *

Subsequent – Requires you to enter the case number of the case you wish to file against

Choose "Initial Filing" only if this is the first filing in the matter and there is no Orphans' Court or Register of Wills case number assigned. If this is a Decedent's estate and there has been a Register of Wills number assigned, choose "Subsequent Filing" and input the estate number in the following format: "201_X____"

Initial Probate Filing
 Subsequent Probate Filing

For restricted cases including adoptions, [submit a request to file](#) for review.

Enter Case Number to search ✕

2020-X0079 ESTATE OF U, U, DECEASED

Select a Filing Type or begin typing to search

Supplemental Inheritance Tax Appraisement
 Supplemental Inheritance Tax Return
 Tax Forms
 Will
 Withdrawal of Appearance

7.2 History

Allows the user to search for previous filings to check on their status. Provide a date range and status, and the results list will come back with matches to your search criteria.

Choose status(es) and a date range and click the 'View Filings' button to see your filings:

Status: Awaiting Payment Saved Awaiting Acceptance Rejected Accepted

[Deselect All](#)

Date Range: Current Month ▾

Today
 Current Month
 Last Month
 Last 30 Days
 Last 6 Months
 Current Year
 Last Year

	Date				
View	7/16				20
View	7/16				20

Choose status(es) and a date range and click the 'View Filings' button to see your filings:

Status: Awaiting Payment Saved Awaiting Acceptance Rejected Accepted [Deselect All](#)

Date Range: Today ▾ [View Filings](#)

	Date Submitted	Case Number	Caption	Document Type	Status
View	7/21/2020	**New Case**	Caption Listed Here	Document Type Listed Here	Awaiting Acceptance

7.3 Search

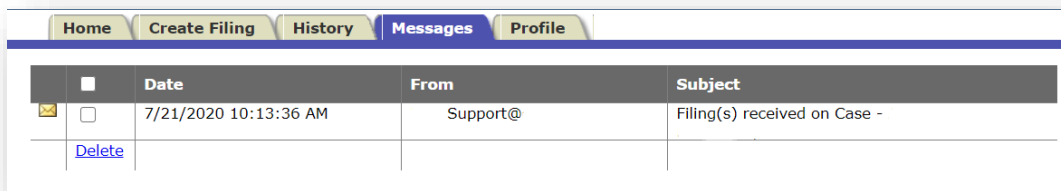
A link to the Viewer to search existing records

7.4 Rejected Filings

Drills down on only the rejected Filings within your account. If the rejected filing was an Initial Filing, you have the ability to make changes, and re-submit your filing.

7.5 Messages

The user can view all eFiling messages. These are the same messages that are sent to the users' email Inbox.



Home Create Filing History Messages Profile				
	Date	From	Subject	
<input type="checkbox"/> <input checked="" type="checkbox"/>	7/21/2020 10:13:36 AM	Support@	Filing(s) received on Case -	
Delete				

You can click to view each message – Below is an example of one:



Home Create Filing History Messages Profile

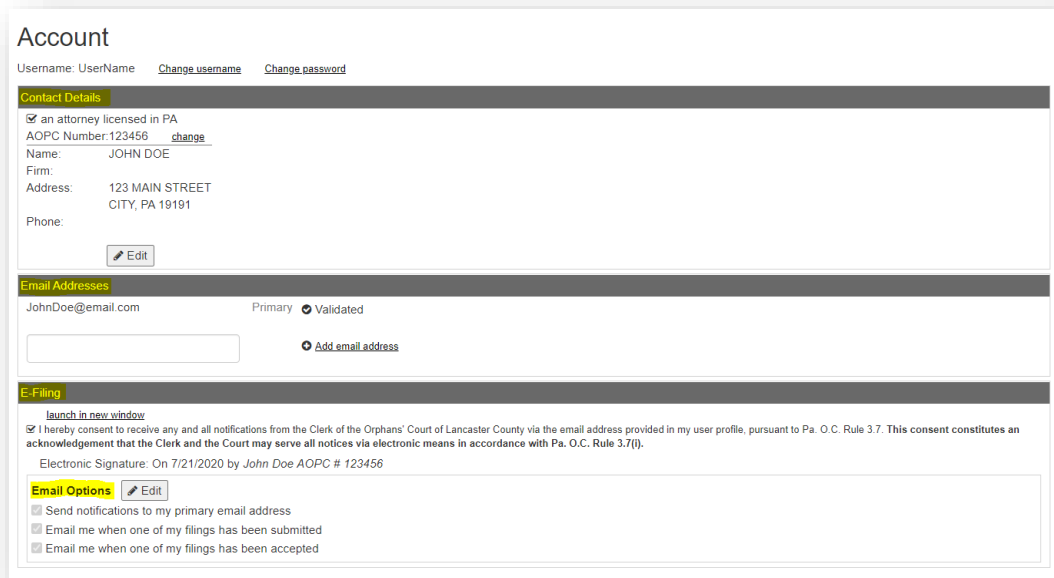
Date: 7/21/2020 10:13:36 AM
From: ROWSupport@co.lancaster.pa.us
Subject: Filing(s) received on Case - ADOPTION OF Borkowski, Lisa
Message:

Dear John Doe,
Your filing has been received by the Lancaster County Orphans' Court. You will be notified as soon as it is processed.
If you opt not to receive email notifications, you may check the status of your filing at any time by logging on to the Lancaster County Efiling Portal and checking your filing status Queue.
<https://qa.psiimage.com/lanco/rowefiling>

Ref#5000

7.6 Profile

Users account information. The user is responsible for keeping this profile up to date to receive proper notifications from the Court. We recommend that each attorney have their own profile associated with their AOPC number, indicating the attorney address and attorney email address.



The screenshot shows the 'Account' page with the following sections:

- Account Information:** Username: UserName, with links for 'Change username' and 'Change password'.
- Contact Details:** A checkbox for 'an attorney licensed in PA' is checked. AOPC Number: 123456 (with a 'change' link). Name: JOHN DOE. Firm: 123 MAIN STREET, CITY, PA 19191. Phone: (empty). An 'Edit' button is present.
- Email Addresses:** JohnDoe@email.com is listed as the Primary and Validated address. There is an 'Add email address' button and an empty input field.
- E-Filing:** A 'launch in new window' link is present. A consent checkbox is checked, with text: 'I hereby consent to receive any and all notifications from the Clerk of the Orphans' Court of Lancaster County via the email address provided in my user profile, pursuant to Pa. O.C. Rule 3.7. This consent constitutes an acknowledgement that the Clerk and the Court may serve all notices via electronic means in accordance with Pa. O.C. Rule 3.7(i). Electronic Signature: On 7/21/2020 by John Doe AOPC # 123456'.
- Email Options:** An 'Edit' button is present. Three checkboxes are checked: 'Send notifications to my primary email address', 'Email me when one of my filings has been submitted', and 'Email me when one of my filings has been accepted'.

7.6.1 Contact Details

Unique Identifier for an Attorney is the AOPC number, for Pro-se it is their DOB

7.6.2 Email Address

It is recommended that the Attorney's email address is listed as the primary. The notifications can always be turned off if they provide a secondary email address.

7.6.3 Efiling

If there are multiple Departments within a Court facility that have eFiling available, you will see each listed account listed that was enabled. It will also include the date in which they consented with an Electronic Signature.

7.6.4 Email Options

You can turn on and off the following email options:

- Send Notifications to my primary email address – You may only turn this off if you have a secondary email address validated within your profile
- Email me when one of my filings have been submitted – You will receive email notification when your filing is sitting in the Awaiting Acceptance Queue at the Court
- Email me when one of my filings have been accepted – You will receive notification when your filing has been accepted or rejected

8 eSignature Process

8.1 Scheduling

After the Case has been reviewed and accepted, you will be contacted to schedule a Webex to sign the documents. All original documents must be received by the County Register of Wills office before the scheduled signing date.

8.2 Signing the Documents

On the scheduled signing day, all participants will receive the link to the Webex as well as the link to the County eSigning website and the five-digit code specific to that signing event.



All required signatures will be listed. Each signer selects their name in order to sign.

Choose Party	
JOHN DOE for	pending
AARON M SMITH, Esq. for	pending
Clerk Witnessing the Document Signatures for	pending
JIM DOE for Renunciation	pending
Clerk Witnessing the Document Signatures for Renunciation	pending

Each signer has a unique identification code to sign their portion of the documents. This code will be given to you during the Webex.

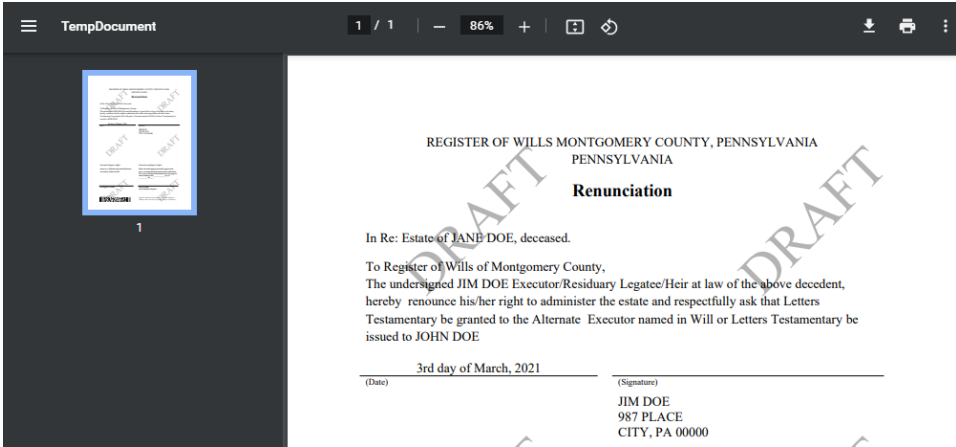
JOHN DOE for

Enter 4-digit signature authorization code

Drafts of the documents are available to view in order to confirm what is being signed.

JIM DOE for Renunciation

Click the document button below to open and review the document. Then return here and click ACCEPT to continue.



The signer adds their signature – this process can be repeated if a signer needs to sign more than one document.



Register of Wills Electronic Filing (eFiling)

Electronic Filing (eFiling)

Paperless Solutions, Inc.

JOHN DOE for



CANCEL CLEAR SIGN

Once all signers have added their signatures, the Webex is complete.

Choose Party	
JOHN DOE for	completed
AARON M SMITH, Esq. for	completed
Clerk Witnessing the Document Signatures for	completed
JIM DOE for Renunciation	completed
Clerk Witnessing the Document Signatures for Renunciation	completed

Any participant with eFiling accounts should receive a confirmation email with a link. Attorneys should be able to get their one free look at this point of all signed documents. Once any final documentation has been received, the Short Certificates will be made available.

9 Contact Us

For assistance with questions or concerns, please contact your County Register of Wills Office.