



eFlex Electronic Filing – Filer Interface

User's Guide for Filers

Iowa Public Employment Relations Board Electronic Filing

September 2014

Introducing eFiling	6
eFiling Basics	6
Figure 1: eFlex Navigation.....	6
Figure 2: eFlex Breadcrumb Trail	7
Document Preparation Prior to Login.....	7
Getting Started	7
Logging In and Requesting an Account.....	7
Figure 3: Login Screen	8
Figure 4: Reading and Accepting User Agreement	9
Figure 5: Association with a User Role.....	10
Figure 6: Association with an Organization	10
Figure 7: Creating a New Organization	11
Figure 8: Using Profile Information.....	12
Figure 9: Notification of User Account Request	13
Resetting Forgotten Password	13
Figure 10: Requesting a Password Reset	14
Figure 11: Resetting a Forgotten Password	14
Resetting Forgotten User Name	15
Navigating from the Home Page.....	15
Figure 12: Home Page	16
Logging Out	16
Figure 13: Notification of Drafts (or Incomplete Filings)	16
Working with Profiles	17
My User Profile	17
Viewing or Editing Your User Profile.....	17
Figure 14: My User Profile	17
Figure 15: User Profile.....	18
Figure 16: Modify User Profile	19
Figure 17: Email Notification Settings.....	20
Passwords	20
Changing the Password.....	20

Figure 18: Change Password Screen	20
Login History	21
Viewing Login History	21
Figure 19: Login History	22
Working with Cases	22
To View My Cases	22
Figure 20: List of “My Cases”	23
To Navigate My Cases Page	24
Figure 21: Viewing the Case History	24
Figure 22: Case History Page.....	24
Figure 23: Case Sorting and Expansion Button	25
Figure 24: List of “My Cases”	25
Figure 25: “Inactive” Checkbox.....	26
Figure 26: Search Cases.....	27
Viewing Case History.....	27
Figure 27: Case History View.....	28
Viewing Certificate of Service	28
Figure 28: Certificate of Service	29
Notifications.....	29
Accessing Your Notifications.....	30
Figure 29: Notice of Electronic Filing (NEF).....	30
Figure 30: Accessing Notifications	31
Figure 31: List of Notifications	31
Figure 32: Viewing Service List and Document.....	32
Figure 33: Deleting Notifications	32
Working with eFile.....	32
Initiating a New Case	33
Figure 34: Initiating a New Case	33
Figure 35: Defining the Case Type	34
Figure 36: Case Initiation Page.....	34

Adding Case Data	35
Adding a Party to the Case.....	35
Figure 37: Adding Parties	35
Figure 38: Add My Party Information Page	36
Figure 39: Required Fields.....	37
Figure 40: Representation Section.....	37
Figure 41: Adding Alias on Additional Organization Name.....	38
Figure 42: Case Initiation Displays Filing Party Added	38
Figure 43: Adding Other Party Information	39
Figure 44: Case Initiation Page Displaying Both Parties.....	40
Adding Documents on a New Case	40
Figure 45: Add a Document Page.....	40
Figure 46: Document Type Drop-down.....	41
Figure 47: Locating Your Document.....	41
Figure 48: Adding a Document	42
Figure 49: Incorrect Document File Format.....	42
Figure 50: List of Added Documents	42
Submitting the Initial Filing	43
Figure 51: Review and Approve Filing.....	44
Figure 52: Changing Party Information	44
Figure 53: Adding or Removing Documents	44
Figure 54: Moving Filing to Drafts.....	45
Figure 55: Filing Submitted Message	46
eFiling to An Existing Case.....	46
Adding a Document to an Existing Case	46
Figure 56: Existing Cases	47
Figure 57: Yellow Banner on Existing Case /Add a Document Page	47
Figure 58: List of Added Documents	49
To Submit a Filing to an Existing Case	50
Figure 59: Review and Approve Page for Existing Cases	50
Figure 60: Navigation Option to Return to Add a Document Page for Editing	51

Figure 61: Filing Has Been Submitted	51
Understanding Filing Status	52
Figure 62: Check Filing Status on My Filings Page	52
To check the status of your submissions:	53
Figure 63: Displaying Document Associated with Filing	54
Figure 64: Displaying Additional Details of a Filing	54
Figure 65: Filing Status Page	55
Handling a "Rejected" Status	56
Figure 66: Resubmit Button for a Rejected Filing	56
Draft Submissions	57
Working On a Draft Filing.....	57
Figure 67: List of Draft Filings.....	57
Figure 68: "Add a Document" Page	58
Deleting a Draft Filing	58
Figure 69: Deleting a Draft Filing	58
Figure 70: Incomplete Filing.....	59
Appendix A: Creating a PDF and Other Document Display Information	60
PDF Basics	60
Creating Documents	60
Including Paper Exhibits.....	60

Introducing eFiling

eFiling Basics

The Iowa Public Employment Relations Board (PERB) eFiling system is designed to make the work associated with initiating and processing a case more efficient for both filers and agency personnel. The web-based filer interface part of the software allows attorneys, representatives, or self-represented filers to create documents and submit them to the agency electronically. The filer interface also provides the means for users to view case histories, check the status of submissions, send follow-up documents, and access service lists.

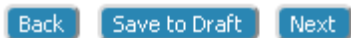
For agency personnel, the software routes the filings to the appropriate personnel for review, response, generation of additional documents, or further action. After initial filings when documents are filed, the filer interface distributes a courtesy notice to electronic participants on the case so those participants may access the documents electronically.

This user's guide is intended to instruct filers on the features of the eFlex system. The following instructions will address the necessary steps for eFiling and will include screen shots of submissions where such duplication will serve to make the instructions more clear.

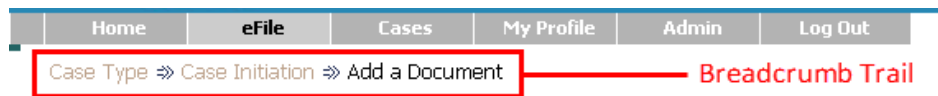
In order to progress through eFiling a case with the greatest ease, following the steps outlined in this manual is highly recommended, including document preparation as discussed below.

Also, for best results, users are strongly encouraged to use only the navigation buttons or action buttons that are displayed on the eFiling interface (*as shown in Figure 1*). These will appear at the bottom of each page and will give the user options such as **Back**, **Save to Draft** or **Next**.

Figure 1: eFlex Navigation



Additionally, the filer may use the menu bar located at the top of each page, just below the PERB banner. Another navigation option is the breadcrumb trail at the top of every page (*as shown in Figure 2*). This appears just below the menu bar, and the active links show the pages the user has visited to get to the current page. Clicking on any of these links will take the user back to the page listed.

Figure 2: eFlex Breadcrumb Trail

Case Type : Prohibited Practice Complaint

Note: Do not use the internet browser back arrow during the preparation and submission of a filing.

Document Preparation Prior to Login

In most cases, the filer will need to attach documents with the initial filing. Those documents and any additional documents that are submitted at a later time need to be submitted as an Adobe® Acrobat® PDF file (Portable Document Format). **Exceptions to this are outlined in PERB administrative rule 621—16.4(2).** It is best to be prepared before logging into the Iowa PERB’s filer interface as your web session will terminate automatically if there is no activity on the web page for 20 minutes.

The requirement for submitting documents in PDF files also applies to paper exhibits. Such paper exhibits must be scanned and saved as a PDF. Because color scans add to the file size, it is highly recommended that black and white settings be used with a lower resolution setting of 300 dpi (dots per inch) when scanning paper exhibits, unless the loss of the color degrades the value of the evidence.

If you need instruction on creating a PDF file, please refer to Appendix A at the end of this user guide.

Note: Individual document size is limited to 10 MB. Multiple documents can be included in a single submission. The size limitation for an entire submission is 30 MB. If the document is larger than the 10 MB limit, it will be necessary to split the document into a set of smaller files. When the large documents are split into parts, it is helpful to save the individual parts with file names such as “Part 2 of Motion,” “Part 3 of Motion,” etc. Preparing large documents in this manner, prior to filing the documents, will save time.

Getting Started

Logging In and Requesting an Account

To begin eFiling, you must first go to the “Login” page (as shown in *Figure 3*) located at: <https://perb.iowa.gov/eFiling> (also accessible via the Iowa PERB homepage at www.iowaperb.iowa.gov) and request an account if you do not already have one.

The “Login” page is also the place where, periodically, PERB’s system administrator may communicate with filers by posting a message providing links to rules or forms or by posting a message notifying users of upcoming system maintenance that will make the system unavailable for a set time period.

Figure 3: Login Screen

perb Iowa Public Employment Relations Board

eFiling Portal

Welcome Terms of use Support powered by eFlex from Tybera

Welcome eFiling

Welcome. You have reached the website for electronically filing disputes and documents with the Public Employment Relations Board. You must have an account to use this service.

Log In

Enter your User Name and Password.

User Name:

Password:

[Log In](#) [Forgot Your Password?](#) [Forgot Your Username?](#)

[Request Account](#)

1. To log into PERB's eFiling system, simply enter your user name and password.
2. If you do not have a login and password, you will need to first register and create an account. To begin the registration process, click on the **Request Account** button on the login page. The "User Agreement" page will open.

Figure 4: Reading and Accepting User Agreement

User Agreement

In order to register for an account with EFlex, you must accept the terms of the user agreement as explained below. Failure to accept these terms will take you back to the login screen.

In order to register for an account for the PERB eFiling system powered by EFlex, you must accept the terms of the user agreement as explained below. Failure to accept these terms will take you back to the login screen.

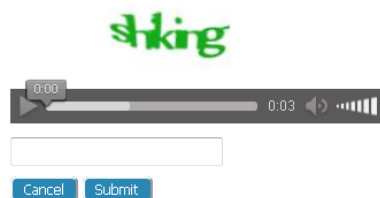
PERB EFILING USER AGREEMENT

The Public Employment Relations Board (PERB) eFiling system user accepts and agrees to the following:

- To be bound by and follow PERB administrative rules chapter 16 and Terms of Use.
- To provide accurate and complete information to the Public Employment Relations Board.
- To accept electronic service through the eFiling system as a valid and effective service for all electronically filed documents except as otherwise provided for in PERB administrative rules chapter 16.
- That the use of the eFiling system login process with a username and password accompanied by a digitized, electronic, or non-electronic signature as defined in PERB rule 621-16.2(10) constitutes Users signature.
- To file all documents in a *pdf* format.
- **That all documents filed by and information provided to the eFiling system by User is subject to public examination unless exempted by Iowa Code chapter 22 or another provision of law.**
- That unavailability of the eFiling system shall neither constitute a basis for an extension of time in which to file any proceeding with PERB nor in any way affect any applicable statute of limitations. In the event of any unavailability of the eFiling system, User agrees that time-sensitive documents must be filed in hard copy with PERB in order to meet any applicable jurisdictional deadlines.
- That User assumes all risk and waives any claim for damages against PERB and the State resulting from use of the eFiling system.
- To promptly notify PERB of any change to User's profile information including any change in name, address, phone number and email address.
- Not to use or attempt to use a username that is obscene, offensive, potentially libelous, or deceptive. A deceptive username includes a username that could be construed to give a false or misleading impression of the individual owner's identity or association with any other legal entity.
- That only a natural person will be issued a username and password.
- To notify PERB immediately of any breach of username security, including any use of the username and password by an individual not expressly authorized to do so by User.
- That User shall be responsible for the security and use of the username and password. Any electronic filing or other interaction with the eFiling system by that username and password shall be deemed to be made by User or with User's express authorization.
- That User shall change their password if user believes the security of an existing password has been compromised.
- That a username and password may not be transferred to anyone. Upon cessation of use of a username by the individual to whom it originally was assigned, User agrees to notify System Administrators immediately to terminate the username.
- To suspension of User's account by System Administrators if they determine that there is any misuse, abuse or fraudulent use of the account. Service will also be suspended if any information provided during the account registration process is false or fraudulent.
- To cooperate with System Administrators and law enforcement during investigations into misuse, abuse or fraud.
- Additionally, please note the following:
 - **Electronic filing is mandatory.** Electronic filing of all documents filed in proceedings commenced on or after January 1, 2015, is mandatory unless otherwise authorized by PERB administrative rules chapter 16. If a proceeding commenced prior to January 1, 2015, is converted to electronic filing by PERB order, all subsequent documents filed in that proceeding shall be electronically filed unless otherwise authorized by PERB administrative rules chapter 16.
 - For proceedings commenced before January 1, 2015, electronic filing of documents is optional unless converted to an electronic proceeding by PERB order. If a non-electronic document is filed, PERB will convert it to electronic and electronically file it.
 - **Withdrawal from eFiling.** You may withdraw from participation in the eFiling system at <https://perb.iowa.gov/efiling> or by contacting the support contact number listed on the eFiling website. If your request to withdraw is approved, your username and password will be canceled and your name deleted from applicable electronic service list. However, your withdrawal from participation in the eFiling system does not authorize you to file proceedings or documents non-electronically, nor does it mean you are withdrawn from a proceeding.
 - **PROTECTED AND CONFIDENTIAL INFORMATION.** You are responsible for ensuring that protected and confidential information is properly redacted from documents that you file in the eFiling system. **All documents filed in the eFiling system are subject to public inspection, unless exempted by Iowa Code chapter 22 or another provision of law.**

- ☐ I have read, understand, and agree to comply with this user agreement and the rules and procedures contained in the Public Employment Relations Board administrative rules chapter 16.
- ☒ I do not accept the terms of the user agreement

Please enter the following text:



3. After reading the terms of agreement, accept the terms by selecting the proper radio button, and click **Submit**. The "User Roles" page will appear.

Figure 5: Association with a User Role

USER ROLES

Select your user role:

- ☐ Attorney
☐ Representative
☐ Self Represented

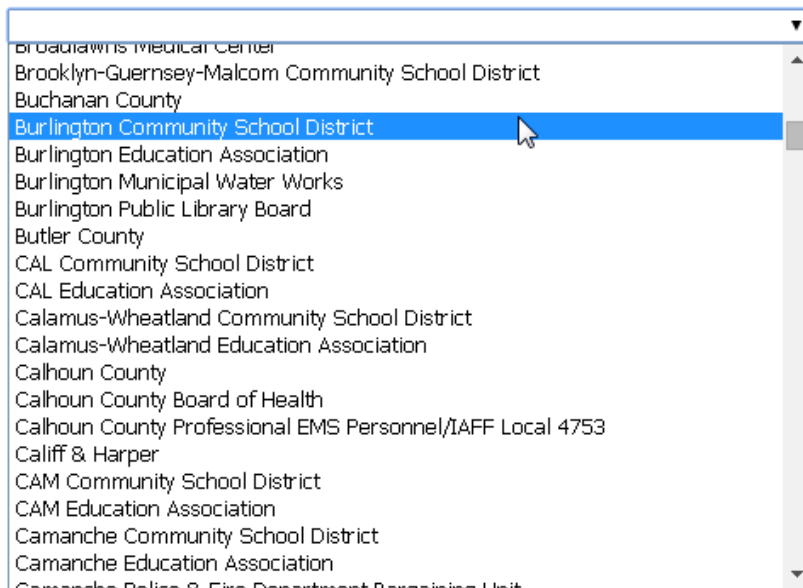
- Each eFlex user must have an assigned role. Roles used by Iowa PERB eFlex system are that of Attorney, Representative, and Self Represented. Select the appropriate user role by clicking the proper radio button.
- Click **Next**. If the selected role was Attorney or Representative, the “Select an Organization” page will open (as shown in *Figure 6*). If the selected role was Self Represented, the “Request a User Account” page will open (as shown in *Figure 8*).

Figure 6: Association with an Organization

Select an Organization

Select the organization you belong to or type it in below:

- ☒ Existing
☐ New



broadawns medical center
Brooklyn-Guernsey-Malcom Community School District
Buchanan County
Burlington Community School District
Burlington Education Association
Burlington Municipal Water Works
Burlington Public Library Board
Butler County
CAL Community School District
CAL Education Association
Calamus-Wheatland Community School District
Calamus-Wheatland Education Association
Calhoun County
Calhoun County Board of Health
Calhoun County Professional EMS Personnel/IAFF Local 4753
Califf & Harper
CAM Community School District
CAM Education Association
Camanche Community School District
Camanche Education Association
Camanche Police & Fire Department Dispatching Unit

- Unless self represented, each user must be associated with an organization.

If the radio button “existing” is selected, use the drop-down menu to select an organization that is already a part of the eFlex community. An “existing” organization may include certified employee organizations recognized by PERB; law firms, public employers, or unions that have previously filed documents in a PERB proceeding; or parties who have participated in impasse services (mediation or interest arbitration) provided by PERB.

Alternately, to create a new organization account, select “New” and fill in the textbox with the organization name (i.e. public employer, union or law firm) for which an account is being established (as show in *Figure 7*). Make sure you use the official name of the organization.

Note: Please check the drop-down menu to ensure that your organization is NOT an “existing organization” before creating a new organization account.

Note: If you selected “Self Represented,” you will not be asked to select or enter your organization’s name. Instead, a “Request a User Account” page will open where personal information (as shown in *Figure 8*) is entered.

Figure 7: Creating a New Organization

Select an Organization

Select the organization you belong to or type it in below:

☐ Existing

☒ New

7. Click **Next**. The “Request a User Account” page will open (as shown in *Figure 8*).

Figure 8: Using Profile Information**Request a User Account**

Organization Name:	HANNIGAN LAW LLC		
User Name:	*	<input type="text"/>	
Password:	*	<input type="text"/>	
Confirm Password:	*	<input type="text"/>	
Title:		<input type="text"/>	
First Name:	*	<input type="text"/>	
Middle Name:		<input type="text"/>	
Last Name:	*	<input type="text"/>	
Suffix Name:		<input type="text"/>	
Bar Number:	*	<input type="text"/>	Bar State: <input type="text" value="IOWA"/>
Phone:		<input type="text"/>	Fax: <input type="text"/>
E-Mail:	*	<input type="text"/>	
Confirm E-Mail:	*	<input type="text"/>	
1st Alternate E-Mail:		<input type="text"/>	
2nd Alternate E-Mail:		<input type="text"/>	
<hr/>			
Address Line 1:	*	<input type="text"/>	
Address Line 2:		<input type="text"/>	
Address Line 3:		<input type="text"/>	
City:	*	<input type="text"/>	State: <input type="text" value="IOWA"/>
Postal Code:	*	<input type="text"/>	Country: <input type="text" value="UNITED STATES"/>
<hr/>			
<input type="button" value="Cancel"/> <input type="button" value="Submit"/>			

8. Fill in the textboxes with the appropriate information. Fields marked with an asterisk (*) are required.

PASSWORD: Per State of Iowa Internet Security Office rules, passwords must be: (a) at least eight characters; (b) a mixture of numbers and upper and lower case letters; (c) and include at least one special character. Passwords must be changed every 60 days.

UNIQUE IDENTIFIER: Each filer has a unique identifying (ID) number. Through this unique number, the eFlex system connects the filer to the cases they have submitted or is a participant.

Note: If you selected “Attorney” as your filer role, then your bar number is required, and this will become your unique ID. Be sure your bar number is typed correctly.

Note: If you selected “Representative” or “Self Represented,” a bar number is not required. PERB will automatically assign you a PIN as your unique ID.

ALTERNATIVE EMAIL: Although not required, a filer may wish to make use of the alternate email fields. Alternative email addresses allow notifications and other system-generated emails regarding case filings to be sent to multiple email accounts. Common alternative email addresses include those for an assistant, paralegal or a secondary personal account.

Note: **CHANGES TO PROFILE:** Some information, such as your bar number, organization name or user role (Attorney, Representative or Self Represented) cannot be modified by the account holder after registration. Changes to these fields must be done through Iowa PERB’s system administrator. Contact PERB’s system administrator at 515.281.4414 to make these changes.

9. Click **Submit**. A page notifying you that a user account has been requested appears (as shown in *Figure 9*) and displays basic user information.

Figure 9: Notification of User Account Request

User Account Requested

Your request to be registered as a user of the eFlex System has been processed. Once your administrator has approved your request you will be able to login under the below username with the password you requested.

Timothy Noonan

User Name: timnoonan
 Bar Number: 9900889
 Bar State: IA
 Phone:
 Fax:
 EMail: timnoonan@tybera.com
 Address: 563 E 770 N
 Des Moines, IA 50315
 US

OK

10. Click **OK** to be returned to the “Login” page. When you have completed the registration, your request will go through PERB’s approval process. You cannot file documents in the eFiling system until your registration has been processed and approved. Once approved, you will receive an email message. You can then log in to the eFiling system using the username and password established during the registration process.

Resetting Forgotten Password

1. If you forget your password, go to the “Login” page and click “**Forgot Your Password?**” The “Request Password Reset” page will appear (as shown in *Figure 10*).

*Figure 10: Requesting a Password Reset***Log In**

Enter your User Name and Password.

User Name: Password: [Log In](#)[Forgot Your Password?](#)[Forgot Your Username?](#)[Request Account](#)**Request Password Reset**

After submitting your user name, an email will be sent to the primary email address listed in your account. This email will contain a secure link to ECF that will display a page containing a new random password. You will be able to log in to ECF using this new password and then change your password to one of your choosing.

Enter your user name below:

[Cancel](#)[Submit](#)

2. Enter your user name and click **Submit**.
3. An email containing a link will be sent to the primary email address listed on your User Profile. This email will not be sent to the alternative email addresses. Upon clicking the link, you will be directed to a page with a temporary password, which you may use to log into the eFlex system.
4. Click **ECF Login Page** to be taken to the Iowa PERB login page (as shown in *Figure 3*). After logging in, proceed to the “Change Password” page (as shown in *Figure 11*) to change the temporary password to a new password. Select **My Profiles > Change Password** from the menu bar located at the top of most pages.

*Figure 11: Resetting a Forgotten Password***Change Password*****Required Fields**Password: *

Your password must be at least 8 characters long, must contain at least one number, must contain an upper and lower-case alphabetic character, must contain a symbol other than a character or number, and must be different than your user name.

New Password: * Confirm New Password: * [Cancel](#)[Submit](#)

5. Enter the temporary password in the “Password” field. Do not try to remember your old password because it has been replaced by the temporary password.

6. Create a new password following the password requirements per the State of Iowa Internet Security Office. Type your new password into the "New Password" field. Remember, passwords must be: (a) at least eight characters; (b) a mixture of numbers and upper and lower case letters; (c) and include at least one special character.

7. In the "Confirm New Password" field, re-type the password exactly as you entered it in step 6.

Note: Re-typing helps to insure you entered the password correctly and will be able to access your account upon subsequent logins. Copying and pasting the password into the "Confirm New Password" field will copy any typing errors created in the first entry.

8. Click **Submit** to save your changes.

Note: If others know your password and enter filings for you with this password, be sure to notify them of the password change.

Resetting Forgotten User Name

1. If you forget your user name, go to the "Login" page and click "**Forgot User Name?**" The "Forgot User Name" page will appear.
2. Enter your email address in the text box and click **Submit**.
3. An email containing your user name will be sent to the primary email address listed on your User Profile. This email will not be sent to the alternative email addresses.
4. Click **ECF Login Page** to be taken to the Iowa PERB login page (as shown in *Figure 3*).
5. If you have forgotten your password as well, you can then request a password reset as discussed in Resetting Forgotten Password (beginning on page 13).

Navigating from the Home Page

The "Home Page" (as shown in *Figure 12*) is your starting point as a filer and is the default screen you see when you login. All the basic filer functions are accessed by clicking the appropriate button listed on the home page. You can also navigate using the menu bar that appears at the top of most pages on the website. Roll the mouse over the listings on the menu bar to become familiar with options not available in the list of buttons at the left of the page. For instance, on the menu bar the "My Profile" drop down list allows you to access pages to view and modify profile information, including changing your password.

Figure 12: Home Page

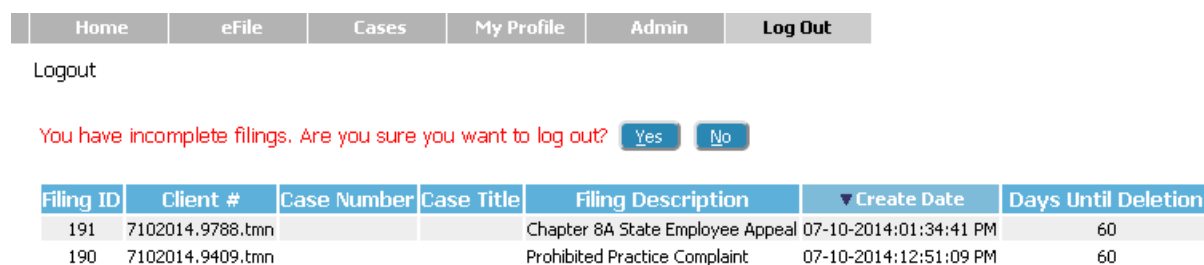
Your name appears on the right side below the banner.

Note: This is a web application. Your web session will terminate automatically if there is no activity on the webpage for 20 minutes. A session is considered active as long as you are interacting with the web server. *If you do not click an action button (Submit, Back, Next, or Save) within 20 minutes, the session will time out and log you off the system.* When the system logs you out, the screen doesn't change. It appears that you're still logged on; however, as soon as you click an action button, you will be asked to login. Typing in a text field does not count as being "active."

Warning: Web browsers keep "Session Data." For this reason, it is important that the user only open one instance of eFlex at a time. Multiple windows where eFlex is open could cause significant problems with the filings as information for web sessions is not stored separately by the browser. This potentially could mean if a user has several instances of eFlex open in various browser windows, then the documents the user attempted to attach to filing A may actually get attached to filing B or duplicate filings may be created.

Logging Out

1. Click the **Logout** button listed on the right side of the menu bar (as shown in *Figure 13*). A "Logout" page will appear.

Figure 13: Notification of Drafts (or Incomplete Filings)

- Review the list of incomplete filings. Prior to completing user logout, the eFlex system notifies users of drafts that may still be in process. Because eFlex saves information entered for a filing after the addition of parties (**Save to Drafts** is clicked) or documents (**Move to Draft** is clicked), a user is able to begin a filing and leave the eFlex session before finalizing the filing. Once the user begins adding documents to the filing, the eFlex system also automatically executes a save action on incomplete filings when a user selects **Logout**. The information entered will be saved in draft form and accessible for completion on subsequent logins.

Working with Profiles

My User Profile

When you register for an account, you are required to provide profile information, which can be edited or updated later as needed.

Viewing or Editing Your User Profile

- Select **My Profile > My Profile** from the menu. The “User Profile” page will appear and display the information entered when the user account was created or modified.

Figure 14: My User Profile



- To change the information in the user profile, click **Modify User Profile** to cause the “Modify User Profile” page to appear (as shown in *Figure 15*).

Figure 15: User Profile

User Profile

Michael Williams

User Name: mw
Organization: TYBERA TEST
Bar Number: 1234
Bar State: UT
User Identifier:
Phone:
Fax:
EMail: mwilliams@tybera.com
1st Alternate EMail:
2nd Alternate EMail:
Address: Tybera Offices
Orem, UT 84501
US
Role: Attorney
Date Approved: Not Available
Expiration Date:

[Modify User Profile](#)[Change Password](#)

Note: It is of the utmost importance that the primary email associated with this account is kept up to date on the system. That updated email is one way the eFlex system communicates with you about activity that has taken place on your cases. If the email information is not changed on the User Profile page, you will no longer receive a Courtesy Notice of Electronic Filing (NEF) regarding your cases. However, you can still view Notifications by logging into the eFlex system and then clicking on Notifications on the Home page.

Figure 16: Modify User Profile**Modify User Profile**

Michael Williams

Role: Attorney

User Name:	mw		E-Mail Notification :
Title:	<input type="text"/>		<input type="checkbox"/> Do NOT email me status updates for received filings
First Name:	* <input type="text" value="Michael"/>		<input type="checkbox"/> Do NOT email me status updates for approved filings
Middle Name:	<input type="text"/>		<input type="checkbox"/> Do NOT email me status updates for partially approved filings
Last Name:	* <input type="text" value="Williams"/>		<input type="checkbox"/> Do NOT email me status updates for rejected filings
Suffix Name:	<input type="text"/>		
Organization:	TYBERA TEST		
Bar Number:	1234	Bar State:	UT
User Identifier:			
Phone:	<input type="text"/>	Fax:	<input type="text"/>
E-Mail:	* <input type="text" value="mwilliams@tybera.com"/>		
Confirm E-Mail:	* <input type="text" value="mwilliams@tybera.com"/>		
1st Alternate E-Mail:	<input type="text"/>		
2nd Alternate E-Mail:	<input type="text"/>		

☐ Use My Organization's Address

Tybera Offices
Orem, UT 84501
US

☒ Use My Address

Address Line 1: *

Address Line 2:

Address Line 3:

City: * State:

Postal Code: * Country:

- On the Modify User Profile page, only fields that display a textbox, radio button, or checkbox may be modified.

Note: You cannot make modifications to fields that do not contain a text box. Changes to these fields must be done through PERB's system administrator. Contact PERB's system administrator at 515.281.4414 to make these changes.

Note: The eFlex system default is to automatically send users emails notifying them of status updates for action taken on their filings (as shown in *Figure 17*). If you do not wish to receive email updates on status changes for received filings, approved filings, partially approved filings, or rejected filings on all of your cases, select the appropriate checkbox to discontinue that service.

Figure 17: Email Notification Settings

Email Notification :

- ☐ Do NOT email me status updates for received filings
- ☐ Do NOT email me status updates for approved filings
- ☐ Do NOT email me status updates for partially approved filings
- ☐ Do NOT email me status updates for rejected filings

4. Click **Submit** to save the changes you have made. You will be returned to the “User Profile” page (as shown in *Figure 15*).

Passwords

You may change your password whenever you wish; however, the State of Iowa’s Internet Security Office required that password be changed at least every 60 days. Remember, passwords must be: (a) at least eight characters; (b) a mixture of numbers and upper and lower case letters; (c) and include at least one special character.

Changing the Password

1. Select **My Profile > Change Password** from the menu bar at the top of the page or, from the “User Profile” page (as shown in *Figure 15*) click **Change Password**.

Figure 18: Change Password Screen

Change Password

***Required Fields**

Password: *

Your password must be at least 8 characters long, must contain at least one number, must contain an upper and lower-case alphabetic character, must contain a symbol other than a character or number, and must be different than your user name.

New Password: *

Confirm New Password: *

Cancel

Submit

2. Enter the current password in the "Password" field.
3. Create a new password following the password requirements (passwords must contain: (a) at least eight characters; (b) a mixture of numbers and upper and lower case letters; (c) and include at least one special character), and type it into the "New Password" field.
4. In the "Confirm New Password" field, re-type the password exactly as you entered it in step 3.

Note: Re-typing helps to insure you entered the password correctly and will be able to access your account upon subsequent logins. Copying and pasting the password into the "Confirm New Password" field will copy any typing errors created in the first entry.

5. Click **Submit** to save your changes and return to the "User Profile" page (as shown in *Figure 15*).

Note: If others know your password and enter your filings, be sure to notify them of the password change.

Login History

The "Login History" screen (as shown in *Figure 19*) shows both your successful and failed logins to help you monitor any unauthorized login attempts.

If your account has too many login failures, the system will automatically suspend your account. Contact PERB's system administrator at 515.281.4414 to reset your password if this occurs.

Viewing Login History

1. Select **My Profile > Login History** from the menu. The "Login History" page appears displaying a list of the login attempts along with the date, login result, and IP address of the requesting machine.

Figure 19: Login History

Login History

Michael Williams Log In History

Employee Account Status: Active

Entries per page: 50 ▼

Date Logged In	Log In Result	Requesting IP Address
2014-07-11 09:17:19.0	Succeeded	192.168.128.46
2014-07-11 08:02:30.0	Succeeded	165.206.164.249
2014-07-11 08:01:19.0	Succeeded	165.206.164.249
2014-07-10 16:42:06.0	Succeeded	192.168.128.46
2014-07-10 16:12:51.0	Succeeded	192.168.128.46
2014-07-10 15:52:32.0	Succeeded	192.168.128.46
2014-07-10 14:43:19.0	Succeeded	192.168.128.46
2014-07-10 13:22:19.0	Succeeded	192.168.128.46
2014-07-10 12:40:25.0	Succeeded	192.168.128.46

2. Use the menu bar at the top of the page to navigate to your next task.

Working with Cases

There are two options under the menu bar option labeled “Cases”. They are:

- “My Cases”
- “Notifications”

When you initiate a new case or send in a follow-up filing, the case number is added to the “My Cases” list if you are a participant, and the eFiling system recognizes that condition. From the menu bar, clicking on **My Cases** will allow you to access a list of cases on which you are a registered participant. Additionally, from this page, you can launch the process to complete a filing to an existing case.

To View My Cases

1. Click **Cases** on the home page (as shown in *Figure 12*) or select **Cases > My Cases** from the menu bar.

Figure 20: List of “My Cases”**My Cases**

Number of cases displayed per page: 50 ▼

IPERB: IOWA PUBLIC EMPLOYMENT RELATIONS BOARD

Case Number

eFile

History

Service List

Ex: 2008 CV 00112

Search Cases

☒ Show Active ☐ Show Inactive ☐ Show Both

▲ Case Title	Case Number	eFile	Case Type	Hearing Officer	Certificate	Inactive
<input type="checkbox"/> ADAIR COUNTY and ADAIR-CASEY EDUCATION ASSOCIATION	000104	eFile	Clarification of Unit	Susan M. Bolte	Service List	<input type="checkbox"/>
<input type="checkbox"/> ADAIR-CASEY EDUCATION ASSOCIATION and ADAIR-CASEY COMMUNITY SCHOOL DISTRICT	000131	eFile	Amendment of Unit	Janelle L. Niebuhr	Service List	<input type="checkbox"/>
<input type="checkbox"/> ADAMS and BRAVO	000089	eFile	Declaratory Order	Janelle L. Niebuhr	Service List	<input type="checkbox"/>
<input type="checkbox"/> ADAMS and DOLL	000091	eFile	Amendment of Certification	Susan M. Bolte	Service List	<input type="checkbox"/>
<input type="checkbox"/> ADAMS and LEE	000076	eFile	Miscellaneous		Service List	<input type="checkbox"/>
<input type="checkbox"/> ADEN and JACOBS	000061	eFile	Negotiability Dispute		Service List	<input type="checkbox"/>

From here you can:

- View a case history of all cases that are stored electronically in the PERB's case management system (CMS).
- View a case history of cases on which you are a participant.
- View case documents.
- View Service Lists
- eFile to an existing case
- Search for cases.

Note: If you are an attorney or a representative and a case was initiated in paper, you may see cases listed here that you have not e-Filed on as PERB has already entered current cases. In these cases, the eFiling system will update your list as soon as anyone on the case submits something on that case through the eFiling system.

Note: If you are a Self Represented Filer, cases you are currently participating in may not automatically show on your list. The reason for this may be that you haven't associated your eFiling account to your cases. You must submit a "Notice of Case Association" document on each case to have it show on this list.

Note: Remember, this is a web application and your web session will terminate automatically if there is no activity on the webpage for 20 minutes. A session is considered active as long as you

are interacting with the web server. For example, if you do not click on an action button (**Submit**, **Next**, or **Save**) within 20 minutes, the session will time out and log you off the system. When the system logs you out, the screen doesn't change. It appears that you're still logged on; however, as soon as you click an action button, you will be asked to login.

To Navigate My Cases Page

1. To limit or expand the number of cases listed, click on the "Number of cases displayed per page" drop-down menu which is located in the upper right corner of the My Cases page (as shown in *Figure 20*). The options for "Number of cases displayed per page" are 50, 100, 500 and all.
2. **Specific PERB Case:** If you wish to see a specific PERB case and you know the case number, you can pull up its Case History by entering the case number and clicking **History** (as shown in *Figure 21*).

Figure 21: Viewing the Case History

3. A detailed Case History displays in another browser tab (as shown in *Figure 22*).

Figure 22: Case History Page

Case Details		Party Details	
Case Number	000073	Filing Party	SHOEMAKER, HAROLD
Case Type	Whistleblower	Responding Party	AFSCME Local 1127
Opened	01-01-2012	Hearing Officer	
Status	Active	Case Processor	

Show/Hide Participants

Filing Party(s)	Attorney/Representative
SHOEMAKER, HAROLD	WILLIAMS

Responding Party(s)	Attorney/Representative
AFSCME Local 1127 PO Box 580 Guttenberg, IA PO Box 580-502 South First Street	

File Date	Case History
07-31-2014 05:44:00 PM	Motion Filed in behalf of: PERB

- You can also enter a case number and click **Service List** (as shown in *Figure 21*). Clicking **Service List** will open a Certificate of Service for that case. This feature allows you to view the list of participants.
- Table column headings (as shown in *Figure 20*) contain a sort feature that allows you to display "Case Number" in ascending or descending order.
- The "Show Active," "Show Inactive," and "Show Both" radio buttons above the list of cases (as shown in *Figure 20*) are a means of filtering what is displayed on the page. The system default is "Show Active" cases. If you wish to see all cases or only the inactive cases, then click the applicable radio button.

Figure 23: Case Sorting and Expansion Button

Search Cases

Use the column headings as a sort feature.

☒ Show Active ☐ Show Inactive ☐ Show Both

Case Title	Case Number	eFile	Case Type	Hearing Officer	Certificate	Inactive
ADAIR COUNTY and ADAIR-CASEY EDUCATION ASSOCIATION	000104	eFile	Clarification of Unit	Susan M. Bolte	Service List	<input type="checkbox"/>
ADAIR-CASEY EDUCATION ASSOCIATION and ADAIR-CASEY COMMUNITY SCHOOL DISTRICT	000131	eFile	Amendment of Unit	Janelle L. Niebuhr	Service List	<input type="checkbox"/>
ADAMS and BRAVO	000089	eFile	Declaratory Order	Janelle L. Niebuhr	Service List	<input type="checkbox"/>
ADAMS and DOLL	000091	eFile	Amendment of Certification	Susan M. Bolte	Service List	<input type="checkbox"/>
ADAMS and LEE	000076	eFile	Miscellaneous		Service List	<input type="checkbox"/>

- Filter the cases listed by selecting the "Inactive" checkbox to the right of a case on which there is no current activity. Because the setting for the "My Cases" page is "Show Active" cases flagged as "Inactive" will not be displayed on the "My Cases" list.

Figure 24: List of "My Cases"

My Cases

Number of cases displayed per page: 50

IPERB: IOWA PUBLIC EMPLOYMENT RELATIONS BOARD

Case Number

Ex: 2008 CV 00112

Search Cases

☒ Show Active ☐ Show Inactive ☐ Show Both

Checking "Inactive" will cause the listing to be removed from the "Show Active" page view.

Case Title	Case Number	eFile	Case Type	Hearing Officer	Certificate	Inactive
ADAIR COUNTY and ADAIR-CASEY EDUCATION ASSOCIATION	000104	eFile	Clarification of Unit	Susan M. Bolte	Service List	<input type="checkbox"/>
ADAIR-CASEY EDUCATION ASSOCIATION and ADAIR-CASEY COMMUNITY SCHOOL DISTRICT	000131	eFile	Amendment of Unit	Janelle L. Niebuhr	Service List	<input type="checkbox"/>
ADAMS and BRAVO	000089	eFile	Declaratory Order	Janelle L. Niebuhr	Service List	<input type="checkbox"/>
ADAMS and DOLL	000091	eFile	Amendment of Certification	Susan M. Bolte	Service List	<input type="checkbox"/>
ADAMS and LEE	000076	eFile	Miscellaneous		Service List	<input type="checkbox"/>

Note: If action is taken on a case you have marked as “Inactive,” notifications will still be received. You can then reset the flag to active by following steps 8 and 9 so the case will be displayed on your “My Cases” list (as shown in *Figure 25*).

Figure 25: “Inactive” Checkbox

My Cases Number of cases displayed per page: 50 ▾

IPERB: IOWA PUBLIC EMPLOYMENT RELATIONS BOARD

Case Number eFile History Service List

EX: 2008 CV 00112

Search Cases

☐ Show Active
 ☒ Show Inactive
 ☐ Show Both

Case Title	Case Number	eFile	Case Type	Hearing Officer	Certificate	Inactive
⊕ ADAIR COUNTY and ADAIR-CASEY EDUCATION ASSOCIATION	000104	eFile	Clarification of Unit	Susan M. Bolte	Service List	<input checked="" type="checkbox"/>
⊕ ADAIR-CASEY EDUCATION ASSOCIATION and ADAIR-CASEY COMMUNITY SCHOOL DISTRICT	000131	eFile	Amendment of Unit	Janelle L. Niebuhr	Service List	<input checked="" type="checkbox"/>
⊕ ADAMS and BRAVO	000089	eFile	Declaratory Order	Janelle L. Niebuhr	Service List	<input checked="" type="checkbox"/>
⊕ ADAMS and DOLL	000091	eFile	Amendment of Certification	Susan M. Bolte	Service List	<input type="checkbox"/>
⊕ ADAMS and LEE	000076	eFile	Miscellaneous		Service List	<input type="checkbox"/>

Unchecking "Inactive" returns the listing to an active status. The case will display on the "Show Active " list.

8. To reset a case as “Active,” select the **Show Inactive** radio button on the right side above the list. The page will refresh and only list the cases that have been marked “Inactive.”
9. When the inactive cases appear on the page, un-check the “Inactive” checkbox for the case that has become active. The case will be reset to “Active” and will be displayed on your “My Cases” active list.
10. The “+” expansion sign listed next to the case title will expand to display a list of documents submitted with the filing.
11. Clicking the document title will open the document in another browser tab or in Adobe Reader, depending on your browser configuration.
12. To search for an existing case which does not appear on the list (or that you want to find without perusing the list) on which you are either a party or representing a party, click **Search Cases** . Enter either part of the case title or the entire case number and click **Search** (as shown in *Figure 26*). The page will refresh with a list that fits that criteria.

Figure 26: Search Cases

Case Number

Ex: 2008 CV 00112

Search Cases

Search by:

Enter a part of the case style or complete case number as search criteria.

Case Title:

Case Number: (Ex: 2008 CV 00112)

Cancel Search

13. The **All My Cases** button, which appears after a case search has been completed, will cause the page to refresh and display all the cases that fit the criteria set by the radio buttons. This is useful to return to the entire list after a narrowed search has been activated.
14. Access additional information about the cases listed on the page by clicking on the “Case Number” link to view the case history or on the “Certificate” link to view the lists of both electronic participants and the list of participants who will need notifications.

Viewing Case History

1. From the “My Cases” page, click the “Case Number” link. This displays the case history in a new browser tab. You can also use the “Case Number” textbox to enter the case number and click **History**.

Figure 27: Case History View

perb
Iowa Public Employment Relations Board

000073 : SHOEMAKER and AFSCME LOCAL 1127
IOWA PUBLIC EMPLOYMENT RELATIONS BOARD

Case Number	000073	Filing Party	SHOEMAKER, HAROLD
Case Type	Whistleblower	Responding Party	AFSCME Local 1127
Opened	01-01-2012	Hearing Officer	
Status	Active	Case Processor	

☐ Show/Hide Participants

Filing Party(s)	Attorney/Representative
SHOEMAKER, HAROLD	WILLIAMS

Responding Party(s)	Attorney/Representative
AFSCME Local 1127 PO Box 580 Guttenberg, IA PO Box 580-502 South First Street	

File Date	Case History
07-31-2014 05:44:00 PM	Motion Filed in behalf of: PERB

Click the expansion link to view the participants or to minimize the field display.

Click the document link to view the document.

- Click the +/- near the upper left corner of the page to show or hide participants (Filing party(s) Responding party(s), Case Processor(s) or Counsels of Record) listed on the case.
- Under the File Date is a listing of actions that have occurred. To download a particular document, click on the title of the document. With few exceptions, you should be able to view all of the documents within a case.
- To leave the case history view, "x" out of your web browser.

Viewing Certificate of Service

Utilizing eFlex generates a Certificate of Service that informs the user which case participants will be notified electronically and which case participants will need service in paper. This information is prior to actual notification. To check who the system has notified and who remains to be notified, check the Notification of Electronic Filing by selecting **Cases > Notifications**.

- From the "My Cases" page, click either **Service List** under the "Certificate" table column headings (as shown in Figure 24), or use the textboxes to enter the case number, court, and case title, and click **Service List**. A secondary page will open.

Figure 28: Certificate of Service



Certificate of Service

Certificate of Service RE: 000073

Case Number: 000073
Hearing Officer:
Board: IOWA PUBLIC EMPLOYMENT RELATIONS BOARD
Case Title: SHOEMAKER and AFSCME LOCAL 1127

This certificate was automatically generated by PERB's auto-notification system.
Date Generated: 08-29-2014:11:09:53

I hereby certify that on 08-29-2014, I electronically filed the foregoing with PERB by using the electronic filing system which will send a notice of electronic filing to the following:

WILLIAMS for SHOEMAKER, HAROLD
Susan Bolte

Participants served electronically.

The following people need to be notified:

AFSCME Local 1127

Participant who needs to be served in paper.

2. The "Certificate of Service" lists the electronic participants first. Those participants who need to be notified in paper will be under the heading "The following people need to be notified:"

Notifications

A "Notice of Electronic Filing" (NEF) is a notice of documents that are filed on a case electronically. Beginning January 1, 2015, **eFiling is mandatory unless exempted by PERB rule 621—16.4(2) and must be served according to PERB rules 621—2.15(20) and —16.10(20).**

Once you have efiled on a case and been added as a party to that case by PERB, the case number is stored in a database, and your username is associated with that case. When documents are filed on any case on which you are a participant, you will receive a Notification within eFlex and a Courtesy Notification in an email, unless you have selected to turn that function off in your user profile. The Notification list within eFlex will be updated with the submission information, including the service list and links to the documents submitted.

As part of your original account registration, you provided an email address and were given the opportunity to include additional email addresses. The eFlex system automatically generates emails to communicate with participants when action is taken on their cases. The email does not include the actual documents or all the details of the submissions. Contained in the email are links to the filer

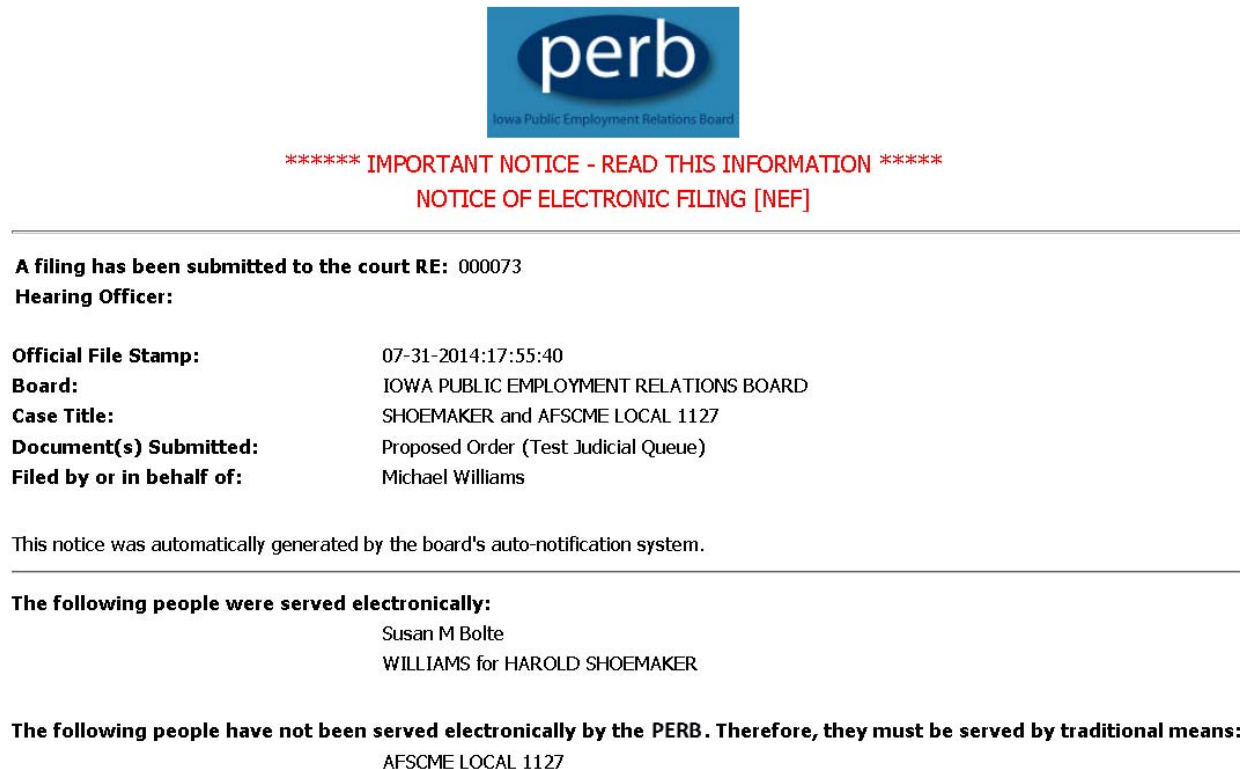
interface so that you can access the details and documents. Basically, the email informs you there is a notice waiting for you to access. Official Notification by PERB is always accessed through logging into the eFlex system.

Notifications generally go out when PERB records a submission.

Accessing Your Notifications

1. To access your notifications from within the email, you can click on the link embedded in the email.
2. The link will launch a web browser and take you to the "Login" page. Once you log in, you will be transferred to the "Notification Listing." (If you already have the eFiling application open, it is not recommended to open a new session by logging into a different browser window.)

Figure 29: Notice of Electronic Filing (NEF)

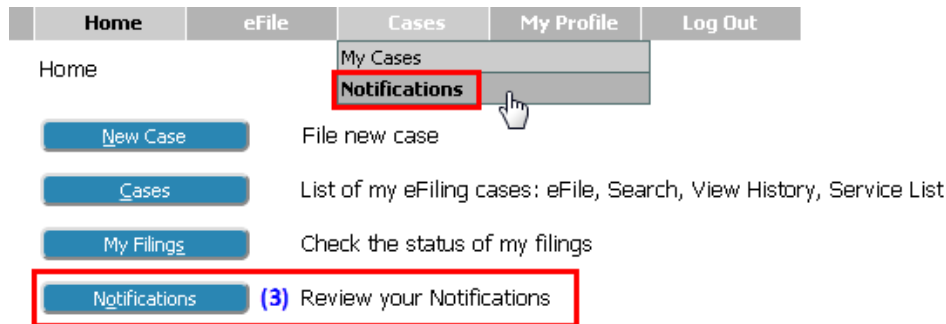


Note: If for some reason you do not receive email messages, you can log in and view your notifications located on the "Home" page (as shown in *Figure 30*). The eFiling system holds all notifications, access to the details of the notifications, and the ability to download the documents.

3. To access your notifications from the "Home" page, you can click on the **Notifications** button. Next to the **Notifications** button on the "Home" page may be a number in parentheses such as (3). This number represents the number of notifications you have not yet accessed. It does not

include the notifications that you have already read. You can also access your notifications from the menu bar **Cases > Notifications**.

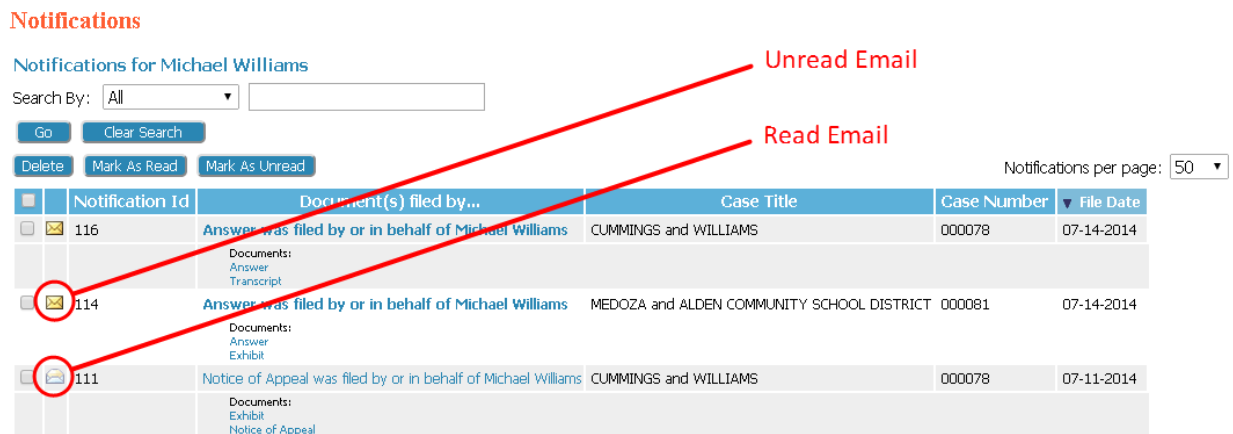
Figure 30: Accessing Notifications



Note: Notifications are not permanent. **For more information about your responsibilities for notification in paper, please refer to PERB rule 621—16.10(20).**

- An unopened envelope icon (✉) (as shown in *Figure 31*) will appear to the left of each email notification you have not yet viewed.

Figure 31: List of Notifications



- Click the link of the submission you wish to view (as shown in *Figure 32*). A secondary page opens where you can view the service list for the case (as shown in *Figure 29*). The list indicates both participants who have been served electronically and a list of those participants who will need to be served by traditional, paper means.
- A sub-listing of each entry will display the documents that were filed with the case. Click on the document link to download a PDF of the document onto your local computer.

*Figure 32: Viewing Service List and Document***Notifications**

Notifications for Michael Williams

Search By:

Go

Clear Search

Delete

Mark As Read

Mark As Unread

Notifications per page

<input type="checkbox"/>	Notification Id	Document(s) filed by...	Case Title	Case Number	File Date
<input type="checkbox"/>	116	Answer was filed by or in behalf of Michael Williams	CUMMINGS and WILLIAMS	000078	07-14-2014
		Documents: Answer Transcript			
<input type="checkbox"/>	114	Answer was filed by or in behalf of Michael Williams	MEDOZA and ALDEN COMMUNITY SCHOOL DISTRICT	000081	07-14-2014
		Documents: Answer Exhibit			
<input type="checkbox"/>	111	Notice of Appeal was filed by or in behalf of Michael Williams	CUMMINGS and WILLIAMS	000078	07-11-2014
		Documents: Exhibit Notice of Appeal			

Click the title to view the Service List for this case.

Click the documents link to view the document associated with this case.

- The envelope icon will change to an open envelope after you have viewed the notification and upon your next return to the Notifications page.
- After you have viewed the notification and downloaded the related documents, you can delete the notification (as shown in *Figure 33*) by selecting the checkbox to the left of the notification and clicking the **Delete** button. The page will refresh, and the deleted notification will no longer appear on the list.

*Figure 33: Deleting Notifications***Notifications**

Notifications for Michael Williams

Search By:

Go

Clear Search

Delete

Mark As Read

Mark As Unread

Notifications per page: 50

<input type="checkbox"/>	Notification Id	Document(s) filed by...	Case Title	Case Number	File Date
<input type="checkbox"/>	116	Answer was filed by or in behalf of Michael Williams	CUMMINGS and WILLIAMS	000078	07-14-2014
		Documents: Answer Transcript			
<input checked="" type="checkbox"/>	114	Answer was filed by or in behalf of Michael Williams	MEDOZA and ALDEN COMMUNITY SCHOOL DISTRICT	000081	07-14-2014
		Documents: Answer Exhibit			

Working with eFile

There are four options under the menu bar option labeled “eFile”. They are:

- **New Case**
- **Existing Case**
- **My Filings**
- **Draft Filings**

Additionally, buttons on the Home page that you can use to initiate the filing process are “New Case” and “Cases” (as seen in *Figure 12*).

The eFiling system enables users to file to PERB.

Note: Remember, this is a web application and your web session will terminate automatically if there is no activity on the webpage for 20 minutes. A session is considered active as long as you are interacting with the web server. For example, if you do not click on an action button (**Submit**, **Next**, or **Save**) within 20 minutes, the session will time out and log you off the system. When the system logs you out, the screen doesn't change. It appears that you're still logged on; however, as soon as you click an action button, you will be asked to login. Typing in a text field does not count as being “active.”

Initiating a New Case

Prior to initiating a new case, you may wish to prepare all documents associated with the case. The default limitations are 10 MB per document and 30 MB per submission. For more information on document preparation, see the “Document Preparation Prior to Login” (page 7) and the “Appendix A” sections of this manual.

1. From the home page, click the **New Case** button or select **eFile > New Case** from the menu bar at the top of most pages on the website (as shown in *Figure 34*).

Figure 34: Initiating a New Case



2. The “Case Type” page will appear (as shown in *Figure 35*). *This is a comprehensive list of all the types of cases that can be filed with PERB.* If you do not see the case type that you believe needs to be filed, please contact PERB’s system administrator at 515.281.4414.

*Figure 35: Defining the Case Type***Case Type**

Description
Amendment of Certification
Amendment of Certification and Unit
Amendment of Unit
Amendment of Certification and Clarification of Unit
Chapter 8A State Employee Appeal
Clarification of Unit
Declaratory Order
Miscellaneous
Negotiability Dispute
Neutral Complaint
Objection to Continuing Impasse Services
Prohibited Practice Complaint
Representation Certification (Election Petition)
Revocation of Certification
Unit Decertification
Unit Determination
Unit Determination and Representation Certification
Unit Reconsideration and Representation Certification
Whistleblower

[Back](#)

3. Select the link for the appropriate case type. A “Case Initiation” page (as shown in *Figure 36*) appears.

Figure 36: Case Initiation Page

Home	eFile	Cases	My Profile	Log Out	user: Michael Williams
----------------------	-----------------------	-----------------------	----------------------------	-------------------------	------------------------

[Home](#) ⇒ [Case Type](#) ⇒ [Case Initiation](#)

Case Initiation: Negotiability Dispute

Client #

Add Case Participants [Add My Parties](#) [Add Other Parties](#)

Participant Name	Role	Representative(s) for Party

[Back](#) [Save to Draft](#) [Next](#)

Adding Case Data

The “Case Initiation” page allows the user to enter relevant information regarding a case, including “Add Case Participants”, “Add My Parties” and “Add Other Parties”).

Note: For Self Represented filers, the table on the Case Initiation page displays the filer’s information which is automatically populated, based on information in the filer’s user profile, when the filer first enters the Case Initiation page. This information is non-editable. Self Represented filers will need to add additional parties on the case manually as explained below.

All other filer roles (Attorney or Representative) will require the filer to manually add all parties on the case.

Adding a Party to the Case

1. For the Filing Party, click **Add My Parties**. For the Responding Party, click **Add Other Parties**.

Figure 37: Adding Parties

Add Case Participants

Add My Parties	Add Other Parties
----------------	-------------------

Participant Name	Role	
------------------	------	--

2. When you click on **Add My Parties**, the “Add a Party” page appears (as shown in *Figure 38*). The **Add My Parties** button allows you to add the Filing Party represented by the filer. The “Add My Party” page allows you to add information about the party you are representing or about yourself in the case of a Self Represented person.

*Figure 38: Add My Party Information Page***Add a Party: Negotiability Dispute**

Filing Party
 Person ☒ Organization ☐

Party Type:

Name Prefix:

First Name: *

Middle Name:

Last Name: *

Name Suffix: (Jr, Sr, ...)

Day Phone:

EMail:

Address Line 1:

Address Line 2:

Address Line 3:

City:

State:

Country:

Zip / Postal Code:

Add Representation for this Party

Last Name	Id #	Type
✗ WILLIAMS	1234	Representative

Add Aliases (AKA)

First Name	Middle Name	Last/Business Name
------------	-------------	--------------------

Note: Fields marked with an asterisk are required by this system and are needed to be filled in prior to moving to the next page. However, you may wish to fill in other fields as well.

Note: PERB has prepopulated the eFiling system with certified employee organizations recognized by PERB; law firms, public employers or unions that have previously filed documents in a PERB proceeding; or parties who have participated in impasse services (mediation or interest arbitration) provided by PERB. Before adding an organization name, check the "Choose Pre-Existing Org:." Instead of scrolling down the list of organizations, you can press the key for the beginning letter of the organization's name and the organizations beginning with that letter will appear. A city (i.e. Adel) is found in the "C's" and is listed as "City of Adel".

Figure 39: Required Fields

Party Type:

Name Prefix:

First Name: *

Middle Name:

Last Name: *

Name Suffix:
(Jr, Sr, ...)

Note: Any party to be served must be added as a distinct party through the Add Party page.

- As an attorney or a representative, the eFiling system automatically associates you to the parties you enter using the **Add My Party** button.

Figure 40: Representation Section

Add Representation for this Party

Last Name	Id #	Type
✗ WILLIAMS	1234	Representative

Add

Add Representation

Last Name:	Id #:	Type:
<input type="text"/>	<input type="text"/>	Representative ▼

Cancel **Save**

- If you need to add additional aliases or organization names, use the Alias section located in the lower right of the Add a Party page (as shown in *Figure 41*). Open the Alias (AKA) functionality by clicking the **Add** button. Enter the appropriate information in the text boxes and click **Save**. The Alias will display on a table directly below the blue and white column headings.

Note: When adding an Alias, the Last Name or Organization Name ("Last/Business Name") is required.




*Figure 41: Adding Alias on Additional Organization Name***Add Aliases (AKA)**

First Name	Middle Name	Last/Business Name						
<div> <div>Add</div> <div> Add Alias <table border="1"> <thead> <tr> <th>First Name</th> <th>Middle Name</th> <th>Last/Business Name *</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> <div> <div>Cancel</div> <div>Save</div> </div> </div> </div>			First Name	Middle Name	Last/Business Name *	<input type="text"/>	<input type="text"/>	<input type="text"/>
First Name	Middle Name	Last/Business Name *						
<input type="text"/>	<input type="text"/>	<input type="text"/>						

- Finally, scroll to the bottom of the Add a Party page and click **Next**. This will return you to the “Case Initiation Page” where the party you added will appear on the list. You can add additional Filing Parties, one at a time, following this procedure.

Figure 42: Case Initiation Displays Filing Party Added

Add Case Participants Add My Parties Add Other Parties

	Participant Name	Role	Representative(s) for Party
 	 HENRY B JORGENSON	Filing Party	WILLIAMS

- Click **Add Other Parties**. The “Add a Party” page allows you to add the Responding Party or Third Party.

Note: The **Add Other Parties** button **does not associate** a representative or an attorney to the parties being added nor does the **Add Other Party** action button add the attorney or representative automatically.

*Figure 43: Adding Other Party Information***Add a Party: Negotiability Dispute****Responding Party**Person ☒ Organization ☐

Party Type: Responding Party ▼

Name Prefix: First Name: * Middle Name: Last Name: * Name Suffix:
(Jr, Sr, ...) Day Phone: (000) 000-0000 Email: Address Line 1: Address Line 2: Address Line 3: City:

State: IOWA ▼

Country: UNITED STATES ▼

Zip / Postal
Code: [Back](#)[Next](#)**Add Representation for this Party** Last Name Id # Type[Add](#)**Add Aliases (AKA)** First Name Middle Name Last/Business Name[Add](#)

7. Use the “Party Type” drop down list to select the party type (“Responding Party” or “Third Party”).
8. Fill in all of the fields for which you have information.

Note: Fields marked with an asterisk are required by this system and need to be filled in prior to moving to the next page. However, you may wish to fill in other fields as well.







Note: PERB has prepopulated the eFiling system with certified employee organizations recognized by PERB; law firms, public employers or unions that have previously filed documents in a PERB proceeding; or parties who have participated in impasse services (mediation or interest arbitration) provided by PERB. Before adding an organization name, check the “Choose

Pre-Existing Org:” option. Instead of scrolling down the list of organizations, you can press the key for the beginning letter of the organization’s name and the organizations beginning with that letter will appear. A city (i.e. Adel) is found in the “C’s” and is listed as “City of Adel”.

- Click **Next**. This will return you to the “Case Initiation Page” where the party you added will appear on the list.

Figure 44: Case Initiation Page Displaying Both Parties

Add Case Participants Add My Parties Add Other Parties

	Participant Name	Role	Representative(s) for Party
 	 HENRY B JORGENSEN	Filing Party	WILLIAMS
 	 MARY FLEISCHMANN	Responding Party	

- Add additional responding parties or third parties, one at a time, following the same procedure listed above.

Adding Documents on a New Case

- Click **Next** on the “Case Initiation” page. The “Add a Document” page (as shown in *Figure 45*) will be displayed.

Figure 45: Add a Document Page

Case Type : Negotiability Dispute


Document Type * -- Please Select Document Type From List Below -- ▾

Additional Text

Acceptable File Format Type(s) (*.pdf)

Document Location Choose File No file chosen

Add to Submission Add

Document Name	View Document	Edit Data	Size	Pg Count	Remove
Case Data	form.xml		0.01 MB		

Total Size: 0.0 MB

Back Move to Draft Next

- From the “Document Type” pull-down menu, select the type of document you are going to add to the submission (as shown in *Exhibit 46*). You can add more than one document, but each document must be completed one at a time, repeating the “Add Document” steps for each document.

Note: If the document (i.e. petition) contains an exhibit or an attachment, **do not** scan the exhibit or attachment behind the document. Instead, the use the “Attachment/Scanned Exhibit” document for each exhibit or attachment.

*Figure 46: Document Type Drop-down***Case Type : Negotiability Dispute**

Document Type *	-- Please Select Document Type From List Below -- ▼
Additional Text	-- Please Select Document Type From List Below --
	Brief
	Exhibit
	Mediation
	Miscellaneous
Document Location	Motion
	Notice
Add to Submission	Petition
	Request

Note: “Additional Text” field allows you to add additional text in the text field provided. This is not a required field. This additional text may help PERB staff or other participants understand the document. For example, if you are adding a motion, you may want to give more information about the purpose of the motion (Motion for Summary Judgment).

3. Locate the document you have prepared by clicking on **Choose File**. The operating system “Open Dialog” will be displayed (as shown in *Figure 47*).

Figure 47: Locating Your Document

Document Location No file chosen

4. Browse to locate your document, select the document, and then click the **Open** button. This will return you to the “Add a Document” page with the file path to your document displayed in the “Document Location” field.
5. Some documents require additional information. By clicking the **Add** button, a screen requesting additional information will appear. After filling out the displayed form, click **Next**. Your documents will be added to the case at this time.
6. Click the **Add** button. *If the document is large*, you will see a message. “UPLOADING DOCUMENT PLEASE WAIT”. This process will copy the document from your local machine to PERB’s server. Once the transfer is complete, you will be returned to the “Add a Document” page (as shown in *Figure 45*). *To add additional documents*, repeat the “Add Document” steps for each document.

Figure 48: Adding a Document

Acceptable File Format Type(s) (*.pdf)

Document Location Other.pdf

Add to Submission

Note: Documents must be filed in the accepted format (pdf) and length. Please see instructions for “Document Preparation Prior to Login” (page 7) or “Appendix A” at the end of the guide. If documents are not in the correct formation, an error message will be generated (as shown in *Figure 49*).

Note: Individual document size is limited to 10 MB. Multiple documents can be included in a single submission. The size limitation for an entire submission is 30 MB. If the document is larger than the 10 MB limit, it will be necessary to split the document into a set of smaller files. When the large documents are split into parts, it is helpful to save the individual parts with file names such as “Part 2 of Motion,” “Part 3 of Motion,” etc. Preparing large documents in this manner prior to filing the documents will save time.

Figure 49: Incorrect Document File Format

Add to Submission

The file is not an acceptable format. It must be of type pdf

Document Name	View Document
Case Data	form.xml
Petition	Petition.pdf

- Each time you add a document, the document entry is displayed in the lower section of the page (as shown in *Figure 50*). The size of each document is included on the entry as well as the page count.

Figure 50: List of Added Documents

Document Location No file chosen

Add to Submission

Document Name	View Document	Edit Data	Size	Pg Count	Remove
Case Data	form.xml		0.01 MB		
Petition	Petition.pdf		0.09 MB	5	
Exhibit	Other.pdf		0.09 MB	5	
Total Size: 0.18 MB					

8. To view the uploaded document, click the **"View Document"** link on the entry, the eFiling system will copy the document stored in the PERB server back to your local machine so you can view the upload.
9. To modify the information associated with the document (as described in step 5), click the "Edit Data" icon. If there is no information collected for that specific document, then the "Edit Data" icon will not be displayed and the column will be blank.
10. If you upload the wrong document, click on "Remove Document" icon under the "Remove" column. This will remove that document from your submission.
11. Click **Move to Draft** if you want to complete the submission at a later time. Each time you click the **Next** button, PERB's server is updated and the partial information you have entered in this process is recorded with the documents.

Note: If your session times out because of inactivity, you will be required to log in again. Because of the auto-save feature once addition of documents has occurred, you may re-open the filing that was in progress during a time-out or the filing that was intentionally moved to draft. To re-open the filing, use the menu bar eFile column to go to **Draft Filings** to finish your submission.

12. When you have finished uploading documents, click the **Next** button at the bottom of the page. The "Review and Approve Filing" page (as shown in *Figure 51*) will be displayed.

Submitting the Initial Filing

Once you have clicked **Next** from the "Add a Document" page you are taken to the "Review and Approve Filing" page (as shown in *Figure 51*). Here you can review and verify the data you have entered for this case as well as change filing information or add and remove documents. There is also a text box for entering special instructions.

1. At the top of this page you see the case type. Below that is an entry box reserved for the "Client #." This is an optional field, and the number is what you use at your firm to identify a specific client. This can be any combination of numbers, letters, and symbols, up to 30 characters in length. This optional information is for your convenience and is recorded in eFlex but is not recorded at PERB as a permanent part of the record. You are not required to enter a filer reference number in order to submit the filing.

Figure 51: Review and Approve Filing

Review and Approve Filing

Case Type : Negotiability Dispute

Generated XML Data: [Change Party Info](#)

Document(s) to be Submitted: [Add/Remove Documents](#)

Document Name	View Document
Petition	Petition.pdf
Exhibit	Other.pdf

Special Filing Instructions for the Clerk:

[Back](#) [Cancel \(Delete\)](#) [Move to Draft](#) [Submit the Filing](#)

- From the “Review and Approve Filing” page, you can change the case information, which includes the party information, by clicking on the **Change Party Info** button.

Figure 52: Changing Party Information

Generated XML Data: [Change Party Info](#)

- You may view the documents uploaded as part of the submission by clicking the “View Document” link for the document you wish to view.
- If you wish to change the documents included in this submission, click the **Add/Remove Documents** button (as shown in *Figure 53*). This will re-direct you to the “Add a Document” page (as shown in *Figure 45*). You can also click the **Back** button at the bottom of the “Review and Approve” page to go back to the “Add a Document” page.

Figure 53: Adding or Removing Documents

Document(s) to be Submitted: [Add/Remove Documents](#)

Document Name	View Document
Petition	Petition.pdf
Exhibit	Other.pdf

5. You can cancel and discard this submission by clicking on the **Cancel (Delete)** button. This will remove the documents on PERB's server and delete all information about this submission. .If you click on the **Cancel (Delete)** button, the following message will appear: "Do you really want to delete the current filing?" You will then be asked to press "OK" or "Cancel". A deleted submission is non-retrievable.

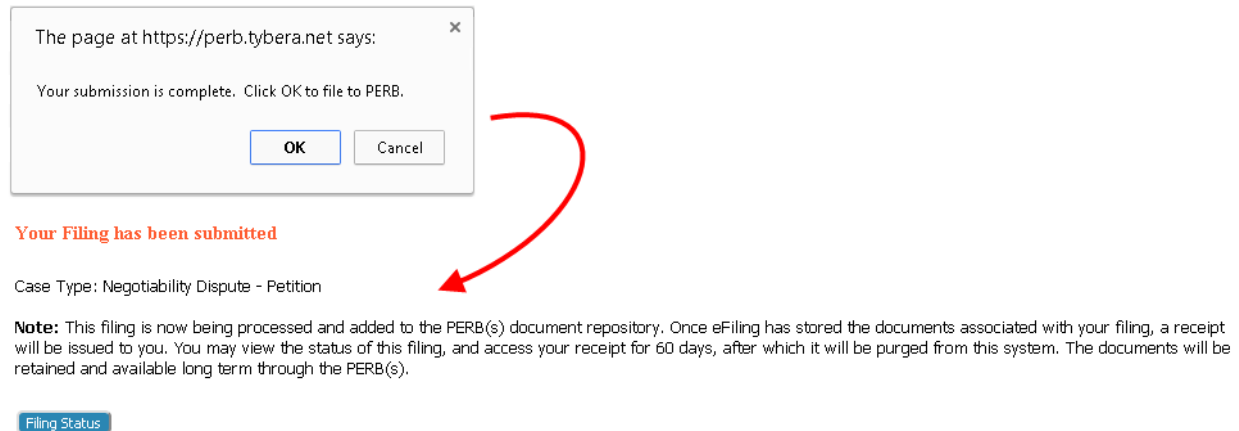
Figure 54: Moving Filing to Drafts

Special Filing Instructions for the Clerk:



6. You can leave your submission in draft state and finish it later by clicking on the **Move to Draft** button.
7. After reviewing the information, click **Submit the Filing**. The eFiling system will transfer the submission to PERB for review.
8. A "Your submission is complete" pop-up message appears (as shown in *Figure 55*). Clicking OK redirects you to the "Submission Confirmation" page. Clicking the Cancel button on the pop-up dialog box will return you to the "Review and Approve" page.

Figure 55: Filing Submitted Message



9. After a filing has been submitted and a submission confirmation is displayed, click on the **Filing Status** button located on the home page (as shown in *Figure 12*) to review the status of your submission. The status of the filings may be viewed for 60 days after receipt of PERB's confirmation.

Note: Please refer to **Understanding Filing Status** (beginning on page 51) to better understand how to access responses from PERB.

eFiling to An Existing Case

Filing to an existing case is similar to filing a new case.

Prior to filing to an existing case, you may wish to prepare all documents associated with the case. The default limitations are 10 MB per document and 30 megabytes per submission. For more information on document preparation, see the "Document Preparation Prior to Login" (page 7) and the "Appendix A" sections of this manual.

Adding a Document to an Existing Case

1. From the home page, click **Cases** or select **eFile > Existing Case** from the menu bar on the top of most pages. The "My Cases" page will appear (as seen in *Figure 56*).

Figure 56: Existing Cases

Home eFile **Cases** My Profile Log Out user: Michael Williams

My Cases Number of cases displayed per page: 50 ▼

IPERB: IOWA PUBLIC EMPLOYMENT RELATIONS BOARD

Case Number
 eFile History Service List

Ex: 2008 CV 00112

Search Cases

☒ Show Active
 ☐ Show Inactive
 ☐ Show Both

Case Title	Case Number	eFile	Case Type	Judge	Certificate	Inactive
FORT MADISON MUNICIPAL WATER WORKS and TEAMSTERS LOCAL 238	000082	eFile	Prohibited Practice Complaint		Service List	<input type="checkbox"/>
MEDOZA and ALDEN COMMUNITY SCHOOL DISTRICT	000081	eFile	Whistleblower		Service List	<input type="checkbox"/>
SEUSS and DAVIS	000079	eFile	Declaratory Order		Service List	<input type="checkbox"/>
CUMMINGS and WILLIAMS	000078	eFile	Chapter 8A State Employee Appeal		Service List	<input type="checkbox"/>

- To begin the process of filing to an existing case, use the eFile link to the right of the correct case in the list of cases. If the case to which you wish to eFile is not listed, enter the correct case number in the Case Number text box and click **eFile**.
- The “Add a Document” page will open. The case number and case title will be displayed in a yellow banner (as shown in Figure 57).

Figure 57: Yellow Banner on Existing Case/Add a Document Page

Home **eFile** Cases My Profile Log Out user: Michael Williams

My Cases ⇒ Add a Document

Case Number : 000078 Case Title : CUMMINGS and WILLIAMS

Document Type * -- Please Select Document Type From List Below -- ▼

Additional Text

Acceptable File Format Type(s) (*.pdf)

Document Location No file chosen

Add to Submission

Document Name	View Document	Edit Data	Size	Pg Count	Remove
---------------	---------------	-----------	------	----------	--------

- From the “Document Type” pull-down menu, select the document type to add to this submission. More than one document may be submitted. However, each document must be done one at a time, repeating the “Add Document” steps for each document.

Note: “Additional Text” field allows you to enter additional text in the text field provided. This is not a required field. The text is displayed in Case History and helps to further identify the document submitted.

5. Locate the document you have prepared by clicking on **Browse**. The operating system “Open Dialogue” will be displayed. Browse to locate your document, select the document, and then click the **Open** button. This will return you to the “Add a Document” page with the file path to your document displayed in the “Document Location” field.
6. Some documents require additional information. By clicking, the **Add** button a screen requesting the additional information will appear. After filling out the displayed form, click **Next**. Your documents will be added to the case at this time.
7. Click the **Add** button. If the document is large, you will see a message “UPLOADING DOCUMENT. PLEASE WAIT”. This process will copy the document from your local machine to PERB’s server. Once the transfer is complete, you will be returned to the “Add a Document” page (as shown in *Figure 45*). To add additional documents, repeat the “Add Document” steps for each document.

Note: Documents must be filed in the accepted format (PDF, in most cases) and length. Individual document size is limited to 10 MB. Multiple documents can be included in a single submission. The size limitation for an entire submission is 30 MB. Please see instructions for “Document Preparation Prior to Login” (page 7) or “Appendix A” at the end of this guide. Failure to attach documents in the correct format will generate an error message (as shown in *Figure 49*). ,.

8. Each time a document is added, the document entry is displayed in the lower section of the page (as shown in *Figure 58*). The size of each document is also included on the entry as well as the page count.

Figure 58: List of Added Documents

[Home](#)
[eFile](#)
[Cases](#)
[My Profile](#)
[Log Out](#)

user: Michael Williams

My Cases ➔ Add a Document

Case Number : 000078

Case Title : CUMMINGS and WILLIAMS

Document Type *

-- Please Select Document Type From List Below -- ▾

Additional Text

Acceptable File Format Type(s) (*.pdf)



Document Location

Choose File

No file chosen

Add to Submission

Add

Document Name	View Document	Edit Data	Size	Pg Count	Remove
Notice of Appeal	Appeal.pdf		0.09 MB	5	
Exhibit	Exhibit.pdf		0.01 MB	3	

Total Size: 0.09 MB

Back

Move to Draft

Next

- To view the uploaded document, click on the “View Document” link, the eFiling system will copy the document stored in PERB’s server back to your local machine so you can view the upload.
- To modify the information associated with the document, click the “Edit Data” icon next to the document. If there was no information collected for that specific document then the “Edit Data” icon will not be displayed and the column will be blank.
- If the wrong document is uploaded, click on the “Remove Document” icon under the “Remove” column. This will remove that document from your submission.
- Click **Move to Draft** if you want to complete the submission at a later time.

Note: If your session times out because of inactivity, you will be required to log in again. Because of the auto-save feature once addition of documents has occurred, you may re-open the filing that was in progress during a time-out or the filing that was intentionally moved to draft. To do re-open the filing, use the menu bar eFile column to go to **Draft Filings** to finish your submission.

- When you have completed adding documents, click the **Next** button at the bottom of the page. The “Review and Approve Filing” page will be displayed.

The “Review and Approve Filing” page (as shown in *Figure 59*), allows you to view, add and remove documents. In addition, there is also a text box for entering special instructions for PERB.

To Submit a Filing to an Existing Case

Figure 59: Review and Approve Page for Existing Cases

Home	eFile	Cases	My Profile	Log Out
------	--------------	-------	------------	---------

My Cases ⇒ Add a Document ⇒ Review and Approve Filing

Review and Approve Filing

000078 Case Title : CUMMINGS and WILLIAMS

You represent the following:

CUMMINGS, WINDLLE

Document(s) to be Submitted: [Add/Remove Documents](#)

Document Name	View Document
Notice of Appeal	Appeal.pdf
Exhibit	Exhibit.pdf

Special Filing Instructions for the Clerk:

[Back](#) [Cancel \(Delete\)](#) [Move to Draft](#) [Submit the Filing](#)

1. You may view the documents uploaded as part of the submission by clicking the “View Document” link for the document you wish to view.
2. If you wish to change the documents included in this submission, click the **Add/Remove Documents** button (as shown in *Figure 60*). This will redirect you to the “Add a Document” page (as shown in *Figure 57*). You can also click the **Back** button at the bottom of the page to go back to the “Add a Document” page.

*Figure 60: Navigation Option to Return to Add a Document Page for Editing***Review and Approve Filing****000078 Case Title : CUMMINGS and WILLIAMS**

You represent the following:

CUMMINGS, WINDLLE

Document(s) to be Submitted:

[Add/Remove Documents](#)

Document Name	View Document
Notice of Appeal	Appeal.pdf
Exhibit	Exhibit.pdf

3. You can cancel and discard this submission by clicking on the **Cancel (Delete)** button (as shown in *Figure 59*). This will remove the documents on PERB's server and delete all information about this submission. If you click on the **Cancel (Delete)** button, the following message will appear: "Do you really want to delete the current filing?" You will then be asked to press "OK" or "Cancel". A deleted submission is non-retrievable.
4. You can leave your submission in draft state and finish it later by clicking on the **Move to Draft** button.
5. After verifying that all information appears as expected, click **Submit the Filing**. The following message will appear: "Your submission is complete." You will then be asked to press "OK" or "Cancel". A deleted submission is non-retrievable.
6. If you press "OK", the message (as shown in *Figure 61*) is displayed indicating that your submission is being transferred for review.

Figure 61: Filing Has Been Submitted

[Home](#)
[eFile](#)
[Cases](#)
[My Profile](#)
[Log Out](#)

user: Michael Williams

My Cases ➡ Add a Document ➡ Review and Approve Filing ➡ Submission Confirmation

Your Filing has been submitted

Case Type: Chapter 8A State Employee Appeal - Notice of Appeal

Note: This filing is now being processed and added to the PERB(s) document repository. Once eFiling has stored the documents associated with your filing, a receipt will be issued to you. You may view the status of this filing, and access your receipt for 60 days, after which it will be purged from this system. The documents will be retained and available long term through the PERB(s).

[Filing Status](#)

7. Click the **Filing Status** button at the bottom of the message to be returned to the “My Filings” page. This page lets you review the status of your submission. The status may take a few minutes to update. If you continue to refresh the status page by clicking **Go**, you will see the status of your submission change. When the submission has been approved by PERB’s system administrator, your submission will have a “Filed” status.
8. Click the **Home** link on the menu or any other link to go to a different point in the eFile application.

Understanding Filing Status

Whenever you eFile something with PERB, the status of your filing is updated to reflect its progress. Each filing will be updated with various statuses. Some happen so quickly that you may not see all the status changes. The “My Filings” page displays the status of each submission as it is updated until the final status of “Filed” has been posted (as shown in *Figure 62*). You may use the **Go** button near the top of the page to “Refresh” the page view.

Figure 62: Check Filing Status on My Filings Page

[Home](#)
[eFile](#)
[Cases](#)
[My Profile](#)
[Log Out](#)

user: Michael Williams

My Filings

My Filings

Michael Williams Filings

Report Criteria:

View Filings Between: 07/10/2014 AND

Filing ID: Case Number: Client #: Status:

My Filings Between 07/10/2014 and Today

Filings per page:

<input type="checkbox"/>	Filing ID	Client #	Case Title	Case Number	▼ Date Submitted	Document Type	Status
<input type="checkbox"/>	202				07-11-2014:09:50:37 AM	Petition for Review by Board	Received
<input type="checkbox"/>	201		CUMMINGS and WILLIAMS	000078	07-11-2014:09:45:28 AM	Notice of Appeal	Received
<input type="checkbox"/>	198		FORT MADISON MUNICIPAL WATER WORKS and TEAMSTERS LOCAL 238	000082	07-11-2014:08:05:07 AM	Complaint	Filed
<input type="checkbox"/>	197				07-10-2014:05:01:12 PM	Petition	Received
<input type="checkbox"/>	196	792014.9339.MW	MEDOZA and ALDEN COMMUNITY SCHOOL DISTRICT	000081	07-10-2014:02:49:03 PM	Motion	Filed
<input type="checkbox"/>	195	792014.7778.MW	SEUSS and DAVIS	000079	07-10-2014:02:47:32 PM	Petition	Filed
<input type="checkbox"/>	194	792014.9999.MW	JONES and MARTINEZ	000079	07-10-2014:02:46:34 PM	Motion	Filed
<input type="checkbox"/>	192	792014.8888.MW	CUMMINGS and WILLIAMS	000078	07-10-2014:02:44:29 PM	Motion	Filed

Number of Filings: 8

A filing can have the status of:

- **Packaged Pending:** the submission is being prepared for clerk review but not yet sent. If the filer sees this status for a period longer than 2 hours, there is likely a problem with the filing. Contact PERB during its business hours of 8:00 a.m. to 4:30 p.m., Monday through Friday, excluding state holidays.

- **Packaged:** the submission is prepared and sent to board review.
- **Received:** the submission has received a time stamp and will be placed in a queue for further processing.
- **Awaiting Approval:** the submission is in a queue for further processing by PERB.
- **Receipt Pending:** an error occurred in communications and the filing is on hold. Contact PERB during its business hours of 8:00 a.m. to 4:30 p.m., Monday through Friday excluding State holidays.
- **Filed:** no further action. The filer should look at their case history or receipt of the submission to download signed documents and check for notes from PERB.
- **Filed, Presented:** accepted and routed to a Queue for review. This means that even though the submission has been filed, the proposed document may not have been reviewed at this time, but it has been presented for review by a case processor or hearing officer.
- **Rejected:** submission was denied. Click the status link to view the note from PERB for an explanation.
- **Resubmitted:** this submission was "Rejected," and the filer used the old submission to create a new submission. The status of this submission marked "Resubmitted" has no future value, and the filer needs to look at the new submission status.

Each entry on the "My Filings" page is temporary and is deleted after a certain period of time. The period of time this information remains is configurable by the eFiling administrator, but is usually not less than 30 days.

Note: it is suggested that the filer check the details of each entry. Although a status is complete, there may still be a note from the Clerk with regards to that entry.

To check the status of your submissions:

1. From the Home page, click **Filing Status** or click **eFile > My Filings** from the menu bar at the top of any page. The "My Filings" page displays the status of each submission (as shown in *Figure 63*).
2. Filter the list by using the calendar icons to select a starting and ending date. Then click **Go**. If you leave the end date blank, the system default is today's date. Other filters include case number, status, and employee.

- Click the “+” symbol in the “Filing ID” column to display the documents associated with the filing.

Figure 63: Displaying Document Associated with Filing

My Filings Between 07/10/2014 and Today

[Delete](#)

<input type="checkbox"/>	Filing ID	Client #	Case Title	Case Number	▼Date Submitted
<input type="checkbox"/>	202				07-11-2014:09:50:37 AM
<input type="checkbox"/>	201		CUMMINGS and WILLIAMS	000078	07-11-2014:09:45:28 AM
<input type="checkbox"/>	198		FORT MADISON MUNICIPAL WATER WORKS and TEAMSTERS LOCAL 238	000082	07-11-2014:08:05:07 AM
			Complaint Prohibited Practice Complaint		
			NEW Receipt		
<input type="checkbox"/>	197				07-10-2014:05:01:12 PM

- Click the document name link that appears when you click the “+” symbol to view/download the document.
- Click the filing “Status” on the right to display additional details about the filing (as shown in *Exhibit 64*). This will include information such as the time-stamp on your submission and links to the receipt and other documents.

Figure 64: Displaying Additional Details of a Filing

Filings per page: 50 ▼

▼Date Submitted	Document Type	Status
07-11-2014:09:50:37 AM	Petition for Review by Board	Received
07-11-2014:09:45:28 AM	Notice of Appeal	Received
07-11-2014:08:05:07 AM	Complaint	Filed
07-10-2014:05:01:12 PM	Petition	Received
07-10-2014:02:49:03 PM	Motion	Filed

- On the “Filing Status” page that appears after clicking the link, view/download the document by clicking the “View Document” link. Documents are included on the table, above the horizontal rule across the page (as shown in *Figure 65*).

Figure 65: Filing Status Page**Filing Status**

Status: Filed 07-11-2014:08:07:42 AM
 Filer Interface ID: 198
 Clerk Interface ID: 155
 Submitted By: Williams, Michael
 Date Submitted: 07-11-2014:08:05:07 AM
 Case Title: FORT MADISON MUNICIPAL WATER WORKS and TEAMSTERS LOCAL 238
 Case Number: 000082
 Case Type: Prohibited Practice Complaint

Note: This filing will be removed from eFiling on 09-09-2014

Document sent with the submission.

Printable Court Receipt: [Receipt](#)

Document Name	View Document
Complaint Prohibited Practice Complaint	Complaint.pdf
Main Document	receipt.html
Form Data	Generated XML Data

Approved By	Status	Date Approved
Williams, Michael	Signed	07-11-2014:08:05:07 AM

Response:

Response	
Description:	Receipt
Author:	System Administrator
Return addresses:	Email: admin@tybera.com Filing: http://perb.tybera.net/boardreview/runit
Document Name	View Document
Main Document	receipt.html
Complaint Prohibited Practice Complaint	Complaint.pdf
Form	form.xml

Document with court time stamp.

[Download Response Package](#)

[Filing Status](#)

Handling a “Rejected” Status

If a submission is “Rejected,” the receipt will include a reason field. Although some reasons are entered automatically by the system, (i.e. the document is upside down) PERB may also enter the reason for the rejection.

A rejected submission will not be processed by PERB through the eFiling system. However, the information included in the rejected submission can be captured and used to begin a brand new submission. Through this process, the error with the original submission can be corrected without the necessity of duplicating work already completed, such as adding case parties.

1. When a submission is “Rejected,” a **Resubmit** button appears next to the status (as shown in Figure 66).

Figure 66: Resubmit Button for a Rejected Filing

Filings per page: 50 ▼

Case Number	▼ Date Submitted	Document Type	Status	
	07-11-2014:09:50:37 AM	Petition for Review by Board	Received	
000078	07-11-2014:09:45:28 AM	Notice of Appeal	Received	
000082	07-11-2014:08:05:07 AM	Complaint	Filed	
	07-10-2014:05:01:12 PM	Petition	Rejected Not Filed	Resubmit
000081	07-10-2014:02:49:03 PM	Motion	Filed	

2. Click **Resubmit** to automatically create a new submission based on the previously rejected submission.
3. You will be routed to the “Add a Document” page, where the documents from the previously rejected submission will be displayed.
4. Correct the error(s) in the previously rejected submission by either deleting the document in question or adding additional required documents through the same steps used as when creating the original filing.
5. From the “Add a Document” page, the filer can also click the “Edit Data” icon displayed to the right of the case information. This will route you back to the case initiation page. This is where you can edit or add party information using the same processes as were done when creating the original filing.
6. When all corrections have been made, click the **Next** button at the bottom of each page to proceed to the “Review and Approve Filing” page where the **Submit the Filing** button can be

activated to complete the new submission. In addition, there is a text box, "Special Filing Instructions For PERB," where you can include additional comments.

Note: The "Filing Status" screen is not where you should look for case information; instead, click **My Cases** on the "Home" page.

Draft Submissions

The "Draft" feature acts as a backup if you are disconnected from the internet. Whenever you begin creating a new submission, eFlex records data each time you advance to the next screen, including any document data you have loaded. If your internet connection goes down, the system creates a draft of your submission.

Generally, the automatic save feature is activated at the "Add a Document" page after the filer has added the first document. You can also perform a manual save by clicking **Save to Draft** on the case initiation page after you have added parties to the case. Additionally, you can click **Move to Draft** on the "Add a Document" page or the "Review and Approve Filing" page. When you are back online, you can continue the filing process where you left off (as shown in *Figure 67*). Each time you log out, you will be prompted if you have any partially completed submissions.

Working On a Draft Filing

1. Click **eFile > Draft Filings** on the menu bar to see a list of partially completed submissions.

Figure 67: List of Draft Filings

Draft Filings

Delete						
<input type="checkbox"/>	Filing ID	Client #	Case Number	Case Title	Filing Description	▼ Create Date Days Until Deletion
<input type="checkbox"/>	203		000082	FORT MADISON MUNICIPAL WATER WORKS and TEAMSTERS LOCAL 238	Prohibited Practice Complaint	07-11-2014:09:50:59 AM 60
<input type="checkbox"/>	193	792014.9999.MW			Amendment of Certification and Clarification of Unit	07-10-2014:02:45:13 PM 59

2. Click the **Filing ID** hyperlink to return to the **Add a Document** page of the filing you worked on, regardless of how far in the process you were when the filing was moved to draft. If this was a case initiation, you will return to the "Add a Document" page for a new case. If this was a filing on an existing case, then you will return to the "Add a Document" page with the yellow banner.
3. If you are working on a new case and need to back up to the "Case Initiation" page, click the **Back** button on the "Add a Document" page. This will then allow you to edit or add parties. After changes are made to the Case Initiation information, click **Next** to proceed to the **Add a Document** page (as shown in *Figure 68*).

Figure 68: “Add a Document” Page

Draft Filings ➞ Add a Document

Case Number : 000082 Case Title : FORT MADISON MUNICIPAL WATER WORKS and TEAMSTERS LOCAL 238

Document Type *

Additional Text

Acceptable File Format Type(s) (*.pdf)

Document Location No file chosen

Add to Submission

Document Name	View Document	Edit Data	Size	Pg Count	Remove
Exhibit	Exhibit.pdf		0.01 MB	3	

Total Size: 0.01 MB

- On the **Add Documents** page, remove or add documents as needed. Proceed to complete the filing as instructed above.

Deleting a Draft Filing

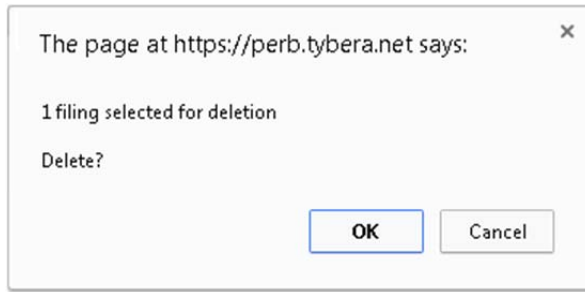
Occasionally a filer may not realize a filing has been moved to draft or may redo a particular submission from the beginning rather than checking their draft folder. This potentially creates a long list of draft filings that may never be completed. A filer can delete entries if the information is no longer needed or if the submission was completed by starting over (as shown in *Figure 69*).

- Select the draft filing you want to delete by clicking on the checkbox to the left of the listing. Click **Delete**. You may check more than one checkbox at a time.
- If you click on the **Delete** button, the message will tell you how many filings you have selected for deletion. You will be asked to press “OK” or “Cancel”. If you select “delete” it is non-retrievable

Figure 69: Deleting a Draft Filing

Draft Filings

Filing ID	Client #	Case Number	Case Title
<input checked="" type="checkbox"/> 203		000082	FORT MADISON MUNICIPAL WATER WORKS and TEAMSTERS LOCAL 238
<input type="checkbox"/> 193	792014.9999.MW		



- Each time you log off the eFiling system, and you have entries in draft status, you will be notified that you have draft entries. The following message will be displayed: "You have incomplete filings. Are you sure you want to log out?" You will be asked to press "Yes" or "No".

Figure 70: Incomplete Filing

Home	eFile	Cases	My Profile	Log Out
Logout				
You have incomplete filings. Are you sure you want to log out? Yes No				
Filing ID	Client #	Case Number	Case Title	
203		000082	FORT MADISON MUNICIPAL WATER WORKS and TEAMSTERS LOCAL 238	
193	792014.9999.MW			

- Clicking "Yes" completes the log out process. Clicking "No" routes the user back into an active draft filings page from which he can navigate to complete one or more draft filings.

Appendix A: Creating a PDF and Other Document Display Information

PDF Basics

PDF (Portable Document Format) is a popular format created by Adobe Systems Incorporated. Documents using this format can be read by Adobe Reader®, a free application available from the Adobe website. This type of document is considered a final form document because it is not designed to be edited. It is fixed and appears the same on nearly every machine using Adobe Reader. Because the document looks the same regardless of the machine, PERB's policy is to send documents as PDF documents." When saving to a PDF format, if there is a choice as to type of PDF, select "PDF A" as this creates a searchable PDF. A PDF document has the extension ".pdf" appended to the file name.

If you have a PDF printer driver installed, you can create PDF documents directly from Microsoft® Word. Some word processing applications, such as Corel® WordPerfect®, include a PDF printer driver as part of the application. There are several vendors that sell PDF printer drivers.

Creating Documents

To create original documents, you'll need a word processing application, such as Microsoft Word, WordPerfect, or other word processing software. You need to use standard fonts when you are creating the original document, such as Times New Roman, Arial, or Bookman Old Style. The font you select also needs to be a "TrueType" font. Selecting standard fonts will help ensure the document formatting converts correctly.

After you create your document, you need to convert it from the word processing format to Adobe PDF file.

If the user is working in Microsoft 2007 or newer version of Microsoft Word, there is a built in Acrobat pdf creator included, generally on a tab on the menu bar. Many users of other word processing programs will install a PDF printer driver as that is the common way to create PDF documents. There are some free PDF printer drivers as well as products you can purchase. Adobe Acrobat Standard or Pro editions include printer drivers. It doesn't matter what operating system or word processing application you use to create your original document as long as you can convert the finished document to a PDF document.

Including Paper Exhibits

With your submission you may need to include copies of paper documents. You must scan these types of paper exhibits into PDF to e-File them. To do this you must have access to a scanner. In your scanner control dialog box, be sure to select the "Scan to PDF" option.

Please use black-and-white settings with a low resolution (300 dpi) resulting in 25 to 50 KB per page in size. Using color adds to the size of the file, so you should only scan using color settings when color is a vital element of the document. If your scan includes color, then lower the resolution enough to reduce

the file size but not to destroy the ability to view the image. See your scanner's user documentation for more information.

Note: Even if your original paper document is all black and white with no color, you should change your color scanner's settings to black and white. Most color scanners have a default setting for color. This default means that the file size will be large even if there is not actual color on your original document.