

PERB EFILING CHEAT SHEET

<https://perb.iowa.gov/efiling>

or accessible through PERB's homepage: www.iowaperb.iowa.gov
by clicking on the "eFiling" link
located on the banner under the "Searchable Databases" link.

PLEASE NOTE:

- Governed by NEW PERB administrative rules 621—chapter 16.
- Mandatory eFiling: January 1, 2015 [Rule 621—16.4(20)].
- Same software as the Judicial Branch's eFiling system.

TO CREATE AN ACCOUNT:

NOTE: You MUST have a user account (*i.e.* username and password) to use PERB's eFiling system. [Rule 621—16.3(1)(a)].

NOTE: Your username and password are a part of your electronic signature. [Rules 621—16.2(20) and 16.7(20)]. If a document requires a signature, then the document must be efiled under the signatory's user account (*i.e.* username and password). Documents should not be filed under the paralegal's or assistant's user accounts.

1. Click **Request Account** on login page.
2. Read and accept terms of "PERB EFILING USER AGREEMENT."
3. Select user role (*i.e.* attorney, representative, self-represented, non-filer).
4. If attorney or representative, select organization (*i.e.* your employer).

HINT: Most organizations have been pre-loaded into the system and can be found in the "Existing" drop-down menu.

5. Complete User Profile.
 - * = required text boxes.
 - If attorney, add your bar number.

○ Non-attorneys will be assigned a unique ID #.

- Alternative e-mails – when emails are sent, they can also be sent to the alternative email address (i.e. assistants, personal email account).
 - Passwords – at least 8 characters, mixture of numbers, upper and lower case letters and 1 special character. Change every 60 days.
6. Click **Submit**.
 7. Click **OK**.
 8. PERB will process and approve your registration and then send you an email notification.

NOTE: You cannot file documents until your registration has been processed and approved.

INITIATING A CASE:

1. Log into PERB’s eFiling system.
2. Click **New Case** or **eFile>New Case** from menu bar.
3. Select case type (*i.e.* Unit Determination, Prohibited Practice Complaint).
4. Click **Add My Parties** to add the name of the filing party.
 - * = required text boxes.

NOTE: If additional representatives are needed, click **Add Representation for this party**.

NOTE: If you want to add aliases (*i.e.* the alias for Albia Community School District may be Albia CSD) click **Add Aliases**. If alias is an Organization Name it goes into **Last/Business Name** column.

5. Click **Next** after adding the name of the filing party.
6. Click **Add Other Parties** to add the name of the responding party.

NOTE: Do not add the representative for the Other Party.

7. Click **Next** after adding Responding Party.

8. You will see all parties listed, click **Next**.
 - You can also click **Back** or **Save to Draft**.
9. Add the case initiating document (*i.e.* Petition, Complaint).
 - Select the document type from the drop-down menu.
 - Add additional text if necessary.
 - Click **Browse** to find the document on your computer.

NOTE: Document MUST be a PDF.

NOTE: Do NOT include any exhibits or attachments in the PDF of your case initiating document. These MUST be added as separate documents under the document type Attached/Scanned Exhibit .
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- Click **Add**.

NOTE: You can then add additional documents, including exhibits or attachments as an Attachment/Scanned Exhibit for each one.

NOTE: You can view the document by clicking on the document name in the “View Document” column.
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NOTE: If you added the wrong document, click on the document icon in the “Remove” column.
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10. Click **Next** to start the submission process.
 - You can also go **Back**, or **Move to Draft**.
11. Click **Submit the Filing**.
 - You can also **Change Party Information, Add/Remove Documents**, go **Back, Cancel (Delete)** the filing or **Move to Draft**.
12. A pop-up email message from PERB will appear which reads: “Your submission is complete. Click OK to file to PERB.”
 - Or you can click **Cancel** and you will be returned to the review and approve filings page where your choices are **Add/Remove Documents, Back, Cancel (Delete), Move to Draft, or Submit the Filing**.

13. If you clicked **OK**, your filing will be submitted to PERB and a message “Your Filing has been submitted” will appear.
14. Click on **Filing Status** or go to the home page and click on **My Filings** to review the status of your submission. Status may be viewed for 60 days, and can be downloaded so it can be printed or saved on your computer.
 - Once PERB has approved your document(s), the **My Filings** page will show the assigned case number and that document(s) are **Filed**.

NOTE: If the document needs to be served upon the other party, you need to serve the document along with an agency approved information sheet regarding mandatory electronic filing. [Rule 621—16.10(1)(20)].

NOTE: The proof of service shall be filed electronically. [Rule 621—16.10(1)(20)].

TO FILE TO AN EXISTING CASE:

1. Log into PERB’s e-Filing system.
2. Click **Cases** or **eFile>Existing Case** from menu bar.
3. Enter Case Number into the text box and click **eFile**.
4. To add documents:
 - Select the document type (*i.e.* Answer, Motion to Dismiss, Brief) from the drop-down menu.
 - Add additional text if necessary.
 - Click **Browse** to find the document on your computer.

NOTE: Document MUST be a PDF.

NOTE: Do NOT include any exhibits or attachments in the PDF of a primary document. These MUST be added as separate documents under the document type **Attached/Scanned Exhibit**.

- Click **Add**.

NOTE: You can then add additional documents, including exhibits or attachments as an **Attachment/Scanned Exhibit** for each exhibit or attachment.

NOTE: You can view the document by clicking on the document name in the “View Document” column.

NOTE: If you added the wrong document, click on the document icon in the “Remove” column.

5. Click **Next** to start the submission process.
 - You can also go **Back**, or **Move to Draft**.
6. Click **Submit the Filing**.
 - You can also **Add/Remove Documents**, go **Back**, **Cancel (Delete)** the filing or **Move to Draft**.
7. A pop-up email message from PERB will appear which reads: “Your submission is complete. Click OK to file to PERB.”
 - Or you can click **Cancel** and you will be returned to the review and approve filings page where your choices are **Add/Remove Documents**, **Back**, **Cancel (Delete)**, **Move to Draft**, or **Submit the Filing**.
8. If you clicked **OK**, your filing will be submitted to PERB and a message “Your Filing has been submitted” will appear.
9. Click on **Filing Status** or go to the home page and click on **My Filings** to review the status of your submission. Status may be viewed for 60 days, and can be downloaded so it can be printed or saved on your computer.
 - Once PERB has approved your document(s), the **My Filings** page will show that the document(s) are **Filed**.

NOTE: When a document is electronically filed to an existing case, it will be served through the e filing system and no other service is required unless ordered by the agency. [Rule 621—16.10(4)(20)].