



“How To”

User Guide:

User-Defined Accounts

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User-Defined Accounts

When a filing is brought in as a User-Defined Account on the Receiving page, the system creates a specific Account for that filing which includes its own Accounts, Deposits and Reconciliation views.¹ This is different than the usual scenario where all filings—regardless of type—are tied to the main Escrow Account, Deposits, and Reconciliation views.

For example, York Prothy is configured for the following scenario:²

- A judge orders that an interest-bearing Escrow Account be created for a certain case (of whatever filing type).
- We created a subsequent filing (Request) called “Escrow Funds Interest Bearing” that is available in the Category dropdown.
- We tied that filing type to the Rule that controls which filing types create UDAs (the rule name is “Create User Defined Account Names”)
- As you can see on the Receiving page, a checkbox that says “Create User-Defined Account” is automatically selected

¹ I say “view” and not “page” because it’s technically the same Accounts, Deposits, and Reconciliations pages. It’s just that a new case specific Account is available in the Account dropdowns of those pages (see screenshots below).

² This is by no means the *only* way to configure it. It could be configured for an initial filing type as well.

Receiving

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Close

New Case Filing

Enter New Case Filing Information

Date/Time Filed: 11/11/2021 08:57 AM

Case No: 1991-NO-002021-31

Category: Escrow Funds Interest Bearing

Quantity: 1

☐ In Forma Pauperis

Additional Miscellaneous Fees

Plaintiff

vs.

Defendant

Primary: ANESTHESIA ASSOC OF YORK PA INC

Clear

Attorney: CALKINS

Clear

CHARLES

BENNETT

ESQ

Primary: FAHS

Clear

SHAWN

Attorney:

Payment Information:

Paid By: < Add New Contact >

Clear

Type: Cash

TRNS Date:

TRNS #:

Make Change

Memo: Escrow Funds Interest Bearing Filing Fee

Amount: \$0.00

Add Payment

Date	Name	Number	Memo	Amount
Delete				

☒ Generate Receipt on Add

☒ Create User-Defined Account

Payments Total: \$0.00

Add

Add/Goto

Once the filing is created, all money brought in on that specific filing (not case) will be directed to and managed with unique Accounts, Deposits, and Reconciliation views. That money will be separate from the Escrow Account even if there are other filings on the same case tied to the normal Escrow Account.

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[Close](#) [New Case Filing](#)

Enter New Case Filing Information Date/Time Filed: 11/11/2021 08:57 AM

Case No: 1991-NO-002021-31

Category: Escrow Funds Interest Bearing Quantity: 1 ☐ In Forma Pauperis

Additional Miscellaneous Fees

Plaintiff vs. Defendant

Plaintiff

Primary: ANESTHESIA ASSOC OF YORK PA INC

Attorney: CALKINS

Defendant

Primary: FAHS

Attorney:

Payment Information:

Paid By: < Add New Contact >

Type: Cash

TRNS Date:

TRNS #:

Memo: Escrow Funds Interest Bearing Filing Fee Amount: \$0.00

Date	Name	Number	Memo	Amount

☒ Generate Receipt on Add ☒ Create User-Defined Account

Payments Total: \$0.00

[Add](#) [Add/Goto](#)

- Note the gray “User-Defined Account” banner to alert the user that this is a User-Defined filing

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[Close](#) [Deposits](#) [Account Maintenance](#) [Reports](#)

Account Ledger ☐ Closed Accounts Account: 1991-NO-002021-31-Escrow Funds Interest Bearing-ANESTHESIA ASSO

☒ Show Only Unprinted Checks (and the last 5 printed checks) [Refresh](#)

☐ Show Only Entries within this Date Range: From: 11/11/2021 To: 11/11/2021

☐ Show Only Entries that match this Search Criteria: Search:

Entry Date	Check #	Case Number	Paid To / Paid By	Category	Sub-Category	Credit	Debit
11/11/2021		1991-NO-002021-31	COUNTY OF YORK - TREASURER	Prothonotary Costs		\$ 0.00	\$ 100.00

Page 1

[Insert VOID](#) [VOID](#) [Form 711](#) [Act 119](#) Next Check Number: [Print Check](#) [Print Check Details](#) **Balance: (\$100.00)**

[Write Tax Comm.](#) **Book Balance: \$139,023.35**

Entry Details

- As you can see, the Account drop-down, rather than displaying Escrow shows the specific case UDA. However, the Escrow account and every other UDA is available in the dropdown to be selected if desired.
- Note also that the cost from the ledger has been transferred to Accounts and that it's the only cost because it's the only cost on the ledger.
- Also, any user with the ability to view Accounts (by permission) can view the User-Defined Accounts.

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Close [Print Receipt](#) [Print Totals](#) [Print Deposit Ledger](#)
☐ By Filing Category

Deposit Ledger Tender Type: Cashier: ☐ Closed Accounts Account:
☐ Show Only Entries Received within this Date Range (including Transferred) From: To: [Refresh](#)

[Clear All](#) [Select All](#)

☐	☐	Rcvd Date	Case Number	Paid By	Memo	Check #	Check Date	Rcpt #	Amount
☐	☐	11/11/2021	1991-NO-002021-31	SHAWN FAHS		Cash		1000114247	\$ 100.00

[Transfer to Accounts](#) [Undo Transfer](#) Transfer Date: [View Ledger](#)

Reason for Deletion: [Delete Deposit](#)
☒ Go To Ledger

- Again, the only deposit tied to the account is available for review on the Deposits page.
- And below, you can see that the Reconciliation is blank since the Deposit has not been transferred and the cost has not yet been paid out (no check number).

- User-Defined Account Name Maintenance page allows you to change the name of the Account and/or Close it (this is the only page where you can close UDAs).
- To access the Account Maintenance page, a user must have the “User Def Account Maintenance” permission

Accounts		Teleosoft Home
		Account Maintenance Reports
☒ Closed Accounts	2015-SU-002045-05-DEBRA L SMITH vs. COMM OF PA DOT- 0237 2016-SU-000765-05-DONOVAN vs. COMM OF PA DOT—0546 (6600100000) 2016-SU-000765-05-Escrow Funds Interest Bearing-DANIEL J DONOVAN vs. COMM OF PA DOT 2016-SU-000765-05-LEE vs. COMM OF PA DOT—5848 (6600998000) 2016-SU-002903-YORK COUNTY vs. JOHN A PETERS—7202 2016-SU-002962-Escrow Funds Interest Bearing-REAL vs. REAL 2016-SU-003079-COMM OF PA DOT vs. STATE ROUTE 4033 - ACCT 5602 (6600988000) 2017-SU-000916-COMM DOT vs. FIRST NATL BANK OF YORK ACCT 3878 (661037000) 2017-SU-002945-COMM OF PA DOT vs. FAIRVEIW TOWNSHIP ACCT 9373 (6601073000) 2017-SU-002945-COMM OF PA DOT vs. FAIRVEIW TOWNSHIP PROPERTY 2019-SU-000431-COMM OF PA DOT vs. MICHAEL J SNYDER **2189**(6601108000) 2019-SU-000431-PENN DOT vs. GLS LUSCO ACCT 7292 (6601111000) 2019-SU-000432-COMM OF PA DOT vs. HASCHK # 7304 (6601115000) 2019-SU-002837-Escrow Funds Interest Bearing-GEORGE A RUTTER, ESTATE OF vs. COMMONWEALTH OF — Closed User-Defined Accounts — 1991-NO-002021-31-TEST 1997-SU-005615-08-COMM OF PA D O T vs. GEORGE WEIGLE *CLOSED* 1997-SU-005615-08-NORTH GEORGE ASSOC VS COMM OF PA - CLOSED 1998-SU-000988-05-COMM OF PA vs. H R TWENTY CORP #3050 CLOSED 2010-SU-001713-05-Interest Bearing-COMMvsMC DONALDS CORP—1029 closed 2013-FC-000616-15-Interest Bearing-KIMBERLY E WATTERSvs.KENNETH A WATTERS—9241 closed 2013-SU-000272-05—NORBERTO H OVIDE vs. COMM OF PA DOT—1539 closed 2014-SU-000318-05-Escrow Funds Interest Bearing**CURTIS R PERAGO, JR vs. COMM OF PA DOT 2014-SU-000318-05-Interest Bearing closed 2014-SU-001597-05-Escrow Funds Interest Bearing-EVELYN MAE SHARP, EXECU vs. COMM OF PA DOT—CI 2014-SU-002269-05-Escrow Funds Interest Bearing-“DISCONTINUED” SALVATION ARMY vs. COMM OF PA D 2014-SU-003786-05-Escrow Funds Interest Bearing-ROBERT A KINSLEY vs. COMM OF PA DOT—8866 close 2014-SU-003786-05-ROBERT A KINSLEY vs. COMM OF PA DOT—8875 CLOSED 2017-SU-000304-Escrow Funds Interest Bearing-REPUBLIC SERVICES GROUP OF PA III LLC vs. COMMONW 2017-SU-000304-REPUBLIC SVC vs. COMM DOT claim#661011000 acct 6485 **closed**	

- Note that when you close a UDA and want to search for it on the Accounts page, you need to select the Closed Accounts checkbox.