State of Florida ePortal Law Firm Administrator Documentation

Prepared by: Florida Association of Court Clerks 6/6/2011

Table of Contents

State of Florida ePortal1
Introduction
Logging in to the ePortal
Law Firms Administrator
Account 4
My Profile
Changing your Password5
Edit Organization
Manage Users7
Unaffilliated Users 10
Filings Options 11
My Filings 12
Organization Filings 12
Existing Case:
Adding / Editing Party Information15
Adding Documents 17
New Case
Adding Case Information
Adding / Editing Party Information 21
Adding Documents 24
Payment
Confirmations
Clerk Review
Simple E-File
Notifications
Open Multiple ePortal Sessions
Frequently Asked Questions

STATE OF FLORIDA – EPORTAL LAW FIRM ADMINISTRATOR DOCUMENTATION

Introduction

The purpose of this document is to provide you, the Administrator, with information necessary to manage your firm's user access.

The Law Firm Administrator security allows the user to update the firm's account, reset firm's user password, inactivate attorney accounts and add additional attorney accounts to the firm. A law firm should consider having more than one administrator to cover leave time, self audit and manage workload.

As with documentation for any new system being deployed, this document will be revised as necessary to reflect modifications and enhancements to the ePortal.

Logging in to the ePortal

Administrators can access the ePortal's log-in page, by typing the following URL into their web browser: <u>www.myflcourtaccess.com</u>.

Administrators do not register on the web site. Their initial profiles are created by FACC. The new administrator must enter their **User Name** and **Password** and change their password on initial entry.



Law Firms Administrator

When the administrator logs into the ePortal they are presented with the My Filings screen. Two menu options are listed just above the My Filings section:

- Account
- Filing Options

Account Management options	elcome - Brother Miner 03/01/2011 09:22:03 AM
My Filings	News & Information This is a test of the
* From (mm/dd/yyyy): 2/26/2011 IIII * To (mm/dd/yyyy): 03/01/2011 IIIII Refresh	news system
Filing # Case # Status County Division Submission Date Completion Date No records to display. Submission Date Submission Date	Miami-Dade Emergency Filings follow the same current procedures.
Change page: ∢ Previous 1 Next Displaying page 1 of 1, items 0 to 0 of 0.	current procedures.
Terms Of Use Privacy Statement Filer Documentation Support? Problems with the site? ©	2011 FACC Services Group

Account

The initial page displays the options available to the administrator: Account, Security, Administration and Filings.

Selecting the Account option provides the user with three submenu options: My Profile, Change Password and Logout.

Account Filing Optic	N Last signed in on	/elcome - Brother Miner - 03/01/2011 09:22:03 AM		
🛒 My Profile		,		
👗 Edit Organization		News & Information		
Manage Users	/2011 🔤 * To (mm/dd/yyyy): 03/01/2011 🔤 🕻 <u>Refresh</u>	news system		
🕹 Unaffiliated Users	County Division Submission Date Completion Date	Miami-Dade Emergency Filings follow the same		
Sign Out Displaying page 1 of 1, items 0 to 0 of 0.				
Terms Of Use Privacy Stater	nent Filer Documentation Support? Problems with the site?	2011 FACC Services Group		

My Profile

In User Details, under My Profile, users can update all information except User Name, Status, Role and Organization. Click Save to save any changes.

My Profile

Select a tab to perform the Fields marked with asterisk (•			
User <u>D</u> etails	<u> </u>	Password		<u>P</u> references
User Details				More Information
Organization: M Role: Pr User Name: Br	o Se - Self Represe	ntation		
* Security Question:* Security Answer:		•		
	* First	Middle	* Last	Suffix
Name:	Brother		Miner	
* Primary Email:	vminer@flclerks.co	m		
Alternate Email1/Email2: Address 1/2:				
City/State/ Zip Code:		Select St	tate 💌	
Phone #:		Format: (#	*##) ###-####	ŧ
	Up	date		

The profile allows for three email addresses. The primary email address is required. Additional email addresses may be other email accounts for the user or the email account of the user's backup or supervisor. Email notifications will be sent all email addresses listed.

Changing your Password

The **Change Password menu option** provides users with the ability to manage / change their password.

My Profile

Select a tab to perform the specific function. Fields marked with asterisk (*) are required.			
User <u>D</u> etails <u>C</u> hange Password <u>P</u> references			
Change Password			
* Current Password:			
* New Password:			
Password must be between 6 and 16 characters, with at least 1 number			
* Re-enter New Password:			
<u>C</u> hange			

New passwords must meet the password criteria that are defined immediately below the **New Password** box.

Edit Organization

This option provides the administrator with the functionality to change the Law Firm's address, email addresses and phone number.

Edit Organization						
Edit this organization's profile	e information then click	update to s	ave.			
Fields marked with asterisk (*) are required.					
Organization Name:	Melvins Law Firm					
* Primary Email:	cox@fl					
Alternate						
Email1/Email2:						
Address1/2:						
City/State/ Zip Code:		Select S	tate	•]
Phone #:	800-223-4278	Format: (;	###) ##	#-####		
<u>U</u> pdate						

Manage Users

This option allows the administrator to view list of users for the law firm, add users, edit users, reset passwords, and disable the user account.

Manage Users

To perform a specific action, first select the row with the user to be affected then click on the corresponding action link.

Users for organization: VM Law Firm

🔒 Add	✓ <u>Edit</u> ■ <u>Prefe</u>	<u> I Preferences</u> <u>Reset Password</u>			<u>Refresh</u>
#	Status	User Name	Name	Primary Email	Primary Phone Number
989	Active	VMLawyer	VM Lawyer	vminer@flclerks.com	
1000	Active	MinerLawyer	Lawyer Miner	vminer@flclerks.com	
Change pag	Change page: Previous 1 Next Displaying page 1 of 1, items 1 to 2 of 2.				

Add

The Add option allows the administrator to establish new user accounts for the law firm. New attorney accounts or administrator accounts can be created by the law firm administrator.

Administrator must complete all required fields. The user receives an activation email at the email address entered as Primary email.

Manage Users - Add User

	role, and enter user information Iterisk (*) are required.
* Organization:	VM Law Firm
* Role:	Select Role Select
ID State/Number:	Select State
* User Name:	
The default passw signing in	ord is "eportal". User will be required to select a new password upon
	* First Middle * Last Suttix
N	lame:
* Primary E	mail:

Alternate Email1/Email2: Address 1/2:	
City/State/ Zip Code:	Select State
Phone #:	Format: (###) ###-####
ļ	Can act as administrator?
	Add <u>C</u> ancel

When the new user received the email and selects to activate the account they will receive an account activation screen to allow them to complete the security requirements for the account.

Once the required fields are completed and the new user clicks Activate they can log into the ePortal.

User Account Activation					
Your security is important to us. Please verify your identity by providing password, your administrator has assigned you. You are required to pick a new password and a security question to activate your account Fields marked with asterisk (*) are required.					
* Current Password: * New Password:					
Password must be between e * Re-enter New Password:					
* Security Question:* Security Answer:					
	* First Vickie vminer@flclerks.co	La	Last awyer	Suffix	
Email1/Email2: Address 1/2:					
City/State/ Zip Code: Phone #:		Select State	e v ###-####		
Activate					

Edit

This option allows the administrator to update a user's account. Updates are allowed to the user name, address, email address and phone number. The account can also be set to act as an administrator or this functionality can be removed from a user by checking or unchecking the *Can act as administrator?* Checkbox.

Manage Users	- Edi	it User				
Edit User Information						
Fields marked with as	terisk (*	*) are required.				
User Name: MinerLawyer Status: Active Role: Attorney – Florida Bar * Organization: VM Law Firm						
	* First Middle * Last Suffix					
N	ame:	lawyer		miner		
* Primary E	mail:	vminer@flclerks.co	m			
Alte Email1/En	rnate nail2:					
Address	5 1/2:					
City/State/ Zip (Code:		Select S	tate 💌		
Pho	ne #:		Format: (###) ###-####		
		□Can act as admin	istrator?			
		Update Cance	1			

Reset Password

This option allows the administrator to reset passwords for the firm's user. The administrator only option is to assign a temporary password. The user will be required to enter a new password when they log into the ePortal. The administrator cannot see the current password on an account.

X
Cancel

Disable

This option allows the administrator to disable or disassociate the user account.

- Disable User Sets the user account to inactive. To reactivate the account call FACC Support Services
- Disassociate User form Organization Removes the user from the law firm.

📄 Disable/Disassociate Us	er ×
Disable User	
Disassociate Use	er from Organization
Ok	Cancel
	Displaying page 1 of 1, items 1 to 3 c

Unaffilliated Users

This option allows the firm administrator to attach users to their organization. An Unaffiliated user is one who has registered online and the organization affiliation has not been established. For instance, if a lawyer registered online and now belongs to this organization (law firm) then the local administrator can search for the user name and affiliate them with the organization.

The initial screen presented to the administrator when selecting this option is a search screen. Enter the name of the user and click on Search.

Unaffiliated Users	
Organization Melvins Law Firm Enter search criteria and then click search to find unaffiliated users.	
* Last Name: First Name:	<u> Search</u>

A list of unaffiliated users matching the entered search criteria are returned and presented.

Locate the user to be added to the law firm. There are two choices for adding the user. They may be added and just a filer by clicking on *Add* link. Or they may be added as an administrator for the law firm by clicking on the *Add as administrator* link.

-	Organization Melvins Law Firm Enter search criteria and then click search to find unaffiliated users.								
* Last Name: miner First Name:							<u>Search</u>		
		#	Status	User Name	Name	Primary Email	Primary Phone Number		
PAdd 3	Ald as administrator	104	Active	vvminer	Vickie Miner	vminer@flclerks.com			
-BAdd	Al <u>Add as</u> administrator	107	Active	vdemo	Vickie V Miner	vminer@flclerks.com			
- Add	Add as administrator	568	Active	AVminer	A V Miner	vminer@flclerks.com			
Padd 1	Al <u>Add as</u> administrator	979	Pending Activation	SMiner	Sarah Miner	vminer@flclerks.com	7788888888		

Filings Options

The Filings option provides the administrator with the following options:

- My Filings The filings submitted by the administrator
- Organization Filings The filings submitted by users for the organization
- Existing Case Initiate the filing for an existing case
- New Case Initiate the filing for a new case
- Simple E-File Initiate a simple e-filing
- Email Log List of emails sent by the portal or received via the portal for the administrator



My Filings

The **My Filings** option allows filers to view a list of filings they have entered using the ePortal. This page allows the filer to view the status of the filing and create a list for a date range. The following is a summary of the information that is contained within the **My Filings** screen:

- Filing #: The portal assigned reference number for your filing.
- **Case #**: The Case Number assigned to the filing. When the filer submits a new case this column will read **NEW CASE** until the case number is assigned by the clerk; once the Clerk assigns a Case Number it will display.
- Status: The status will reflect one of the following: Pending Review, Being Reviewed, Filed, or Rejected.
- **County**: The name of the county the case is filed in.
- **Division**: The court division the case is filed in.
- Submission Date: Date the filer submitted the filing on the portal.
- **Completion Date**: Date the filing was processed by the Clerk's office.

Note: To expand each filing for more details, click the box to the left of each filing.

l								
1	Account Printy Options							Velcome - - 12/29/2010 08:31:10 AM
M	y Filin	gs						News & Information
*	From (mm/dd/yyyy): 12/27/2010 * To (mm/dd/yyyy): 12/30/2010 * Refresh							This is an FACC non- branded page item.
	Filing #	Case #	Status	County	Division	Submission Date	Completion Date	1
	5138	NEW CASE	Pending Review	Columbia	Probate	12/30/2010 09:36:20 AM		
	#	Status	Document Group	Document 1	Гуре	Rejection Reason	File Name	
	1	Received	Initial Pleading	Petition for	Administration		Damages.doc	
	5092	NEW CASE	Pending Review	Alachua	Circuit Civil	12/28/2010 09:27:00 AM		
	#	Status	Document Group	Document 1	Гуре	Rejection Reason	File Name	
	1	Received					marriage license (2).pdf	
Cł	Change page: Previous 1 Next Displaying page 1 of 1, items 1 to 2 of 2.							
		1						
Т	erms Of U	lse Privacv	Statement Supp	oort? Pr	oblems with 1	the site?	0	2009 FACC Services Group

The My Filings list defaults to filings within the current week. The filer may expand or narrow the list by using the '**From'** and '**To'** dates. These date ranges will be utilized to run a report of all filings for the specified date range. Then click **Refresh** to generate the list for the new date range selected.

Organization Filings

The **Organization Filings** option allows filer to view a list of filings entered by the law firm using the ePortal. This page allows the filer to view the status of the filing and create a list for a date range. The following is a summary of the information that is contained within the **My Filings** screen:

• **Filing #**: The portal assigned reference number for your filing.

- **Case #**: The Case Number assigned to the filing. When the filer submits a new case this column will read **NEW CASE** until the case number is assigned by the clerk; once the Clerk assigns a Case Number it will display.
- Status: The status will reflect one of the following: Pending Review, Being Reviewed, Filed, or Rejected.
- County: The name of the county the case is filed in.
- **Division**: The court division the case is filed in.
- Submission Date: Date the filer submitted the filing on the portal.
- **Completion Date**: Date the filing was processed by the Clerk's office.

Note: To expand each filing for more details, click the box to the right of each filing.

Me	Melvins Law Firm Filings							
* F	* From (MM/dd/yyyy): 01/02/2010 🗰 * To (MM/dd/yyyy): 03/02/2011 🕮 🗞 <u>Refresh</u>							
	Filing #	Case #	Status	County	Division	Submission Date	Completion Date	
+	3716	10001097CC	Filed	Columbia	Circuit Civil	10/13/2010 03:24:40 PM	10/13/2010 03:42:47 PM	
+	913	whatever	Errors	Sarasota	Circuit Civil	01/28/2010 04:25:37 PM		
+	910	09000222CA	Filed	Columbia	Circuit Civil	01/28/2010 03:46:19 PM	01/28/2010 03:48:09 PM	
±	909	09000200CA	Errors	Sarasota	Circuit Civil	01/28/2010 03:33:32 PM		
±	908	2005 CV 00102	Errors	Sarasota	Circuit Civil	01/28/2010 03:29:59 PM	01/29/2010 05:48:26 AM	
+	746	09000222CA	Filed	Columbia	Circuit Civil	01/14/2010 09:08:25 AM	01/14/2010 09:14:44 AM	
Ch	ange page:	Previous 1 Nex	t 🖡			Displaying page	1 of 1, items 1 to 6 of 6.	

The **Organization Filings** list defaults to filings within the current week. The filer may expand or narrow the list by using the '**From'** and '**To'** dates. These date ranges will be utilized to run a report of all filings for the specified date range. Then click **Refresh** to generate the list for the new date range selected.

Existing Case:

Selecting **Existing Case** from the Filing Options allows the filer to file subsequent filings into an existing case.



To File Subsequent Document(s) into an existing case, the filer must know the case number.

Select the Court type, County and Division from the dropdown list provided. (Items are added to the dropdown when it becomes available for e-Filing. If the dropdown does not contain the court type, county or division for your filing, e-filing is not available.)

Enter the case number and tab. The ePortal will search for the case record.

- If the county's case management system is not linked to the ePortal the search for case information will not be initiated and no case information will be displayed to the filer.
- If the case record is located the Case Type and Title are displayed. Please verify that you have the case for your filing before proceeding.
- If the case record is not located a message will be presented. Please verify your case number entry.
 - If entered incorrectly click the Cancel button on the message to reenter the case number.
 - If entered correctly click the OK button on the message to continue processing.
 - If the case privacy is confidential or higher, case information will not be returned from CCIS and may not be returned from the county case management system.

File Su	ubsequent Docu	ment(s) into a	an existing Ca	se		
Court Type: Trial		Count	y: Columbia	Div	vision: County Civil	
Case	e #: 09000222CA	Case Typ	e: Landlord/tenan Eviction/Posses		al Fee: \$0.00	
٩	Case Information	🙎 Parties	Documents	🍓 <u>P</u> ayments	; 1 Preview & Submit	t
	ed fields on this screen are browser's arrow keys (upp				reen, click NEXT to continue. <u>Do r</u>	<u>not</u>
	 Type Of Court 	* County		* Division		
	Trial	 Columbia 	а	 County Civil 	▼	
	* Case #: 0900022	2CA	Example 09 00020	00 CA		
	Case Type: Landlord	tenant / Eviction/	Possesion			
	Case Title: JPMORGA	N CHASE BANK VS	BEVILLE ROBERT	М		
#	Description				Amount	
1	Filing fee				\$0.00	
Emer	gency Filing		Next			
Terms O	f Use Privacy Statement	Support? Probler	ns with the site?		© 2009 FACC Services	s Group

Note: Items in the drop down lists are dependent on what is available on the ePortal and by the county. Initially the Type of Court dropdown contains only Trial court. As e-Filing continues other court types will be added to the court types allowing e-Filing. As a county begins participation in e-Filing they will be added to the County

dropdown. If the county is not displayed in the dropdown they are not currently participating in e-Filing. Each County determines the Divisions participating in e-Filing. Not all divisions in a county may initially participate in e-filing. As a county brings up a new division it will be listed in the dropdown for the county.

Note: Emergency Filing flag – Each county may handle emergency filing differently. Please contact the county for information regarding the emergency filing processing procedure.

Complete all required fields and click **Next**. The filer may move through the process by clicking on the Next button when each screen is complete or by clicking on the tabs (Case Information, Parties, Documents, Payments, Review And Submit.

Adding / Editing Party Information

Select Current Parties or under the New Parties section click Add Party to add a new party.

File Subsequent Docu	ment(s) into an e>	kisting Case				
Court Type: Trial Case #: 09000222CA		lumbia ndlord/tenant / iction/Possesion	Division: Total Fee:	County Civil \$0.00		
🔊 <u>C</u> ase Information	🔹 Parties 📄 D	ocuments	👩 <u>P</u> ayments	↑ <u>R</u> eview & Submit		
▲ Case Information ▲ Parties Documents ▲ Payments ▲ Review & Submit All required fields on this screen are marked with an asterisk (*). When you have completed this screen, click NEXT to continue. Do not use your browser's arrow keys (upper left screen corner). For more information, click the Help link. Current Parties Please select all parties on whose behalf you are submitting this filing. Note: to select multiple items, use CTRL-CLICK for selection. BEVILLE ROBERT M [D] JPMORGAN CHASE BANK [P] UNKNOWN SPOUSE ROBERT BEVILLE [D] UNKNOWN TENANTS OWNERS [D] New Parties If your party does not appear above, add the parties here. Note: You can't add attorneys.						
# Тур	e Primary	Name	Address			
L	l	<u>N</u> ext				
Terms Of Use Privacy Statement	t Support? Problems with	the site?		© 2009 FACC Services Group		

When adding a party you have 3 options:

- Copy your account information into the party fields by pressing on the Copy from Current Filer option.
- 2. Search registered users and copy their information into the party fields by pressing on the Search Registered Filers option
- 3. Enter party information directly into the fields available.

In some cases the party may need to be served with documents. Service Options are provided to identify the type of service to be used to serve the documents. If electronic is chosen then an email is sent to the party email address with documents attached when the filing is submitted.

	New Party Select Select State	T		Primary Party	Filed On Behalf of
	Copy From Curre	<u>nt Filer</u> 🔑 🤉	Search Registe	ered Filers	
	You must enter either µ	person or org	anization name.		
	First	Middle	Last	Suffix	
* Person Name:					
OR Organization:					
Email Address:					
Address:					
City/ State/ Zip Code:		Select St	ate 🔹		
Phone #:		Format: ##	*#-###-####		
Service Options:	Not Served				
	<u>S</u> ave	<u>C</u> an	cel		

Click the Save button when entries are complete. The pre-existing parties and the new parties will be displayed. In the listing of the new party records the filer has the option to **Edit** or **Remove** a party they have entered on the case. Parties previously existing on the case cannot be edited or removed. Clicking **Add Party** again allows the filer to add another party to the case.

File Subsequent Document(s) into an existing Case

Court Type: Trial		County: Columbia Case Type: CI			Division: Probate Total Fee: \$0.00			
Case #: 09000200CA	Case Ty	pe: CI		10	tai ree:	\$0.00		
🔊 <u>C</u> ase Information	2 Parties	D <u>(</u>	ocuments	🍓 <u>P</u> aymen	ts	↑ <u>R</u> eview & St	ubmit	
All required fields on this screen are marked with an asterisk (*). When you have completed this screen, click NEXT to continue. Do not use your browser's arrow keys (upper left screen corner). For more information, click the Help link.								
Current Parties								
Please select all parties on w	/hose behalf you are subm	nitting thi	is filing. Note: t	o select multiple	items, use	e CTRL-CLICK for sel	ection.	
MIDLAND FUNDING LLC VIOLETTE RENA F [D]								
New Parties								
If your party does not appea	ar above, add the parties i	here. Not	te: You can't a	dd attorneys.				
Add Party								
#	Туре	Primary	Name		Address			
🖉 Edit 🕺 Remove 1	Beneficiary	No	Mother Miner		18 Main Str	reet Orlando 32256		
			Next					

When the filer has completed adding or editing all necessary party information, click the **Next** button.

Adding Documents

The filer is directed to the documents screen. Click Add Document to add a document to the case.

File Subsequent Document(s) into an existing Case							
Court Type: Trial County: Columbia Division: County Civil							
Case #: 09000222CA	Case Type:	Landlord/tenant Eviction/Posses		\$0.00			
) <u>C</u> ase Information	2 Parties	Documents	👩 <u>P</u> ayments	1 Review & Submit			
All required fields on this screen are marked with an asterisk (*). To attach a document click the Add Document link. After attaching your document, click SAVE, then click Add Document to add another document. Click NEXT to continue. <u>Do not</u> use your browser's arrow keys (upper left screen corner). For more information, click the Help link.							
# Docu	ment Group Doc	ument Type		Filing Fee			
No Documents							
Add Documents and select Next. Next							
Terms Of Use Privacy Statement	Support? Problems	with the site?		© 2009 FACC Services Group			

Note: On existing cases, there may or may not be a file, based on the type of document and the codes the clerk has set up.

Select the **Document Group**, **Document Type**, **# Pages** and select the document. To select a document click **Browse**, select the document and attach document. Click **Save**.

Document Group and Document Type dropdown lists are established by the county staff. If the document group or type is not listed, contact the county office.

Document		
Document #:	New Document	Filing Fee:\$0.00
* Document Group:	Initial Pleading	~
* Document Type:	Petition for Administration	•
* # Pages:	3	
* Select Document:	C:\Users\vminer\Clericus VSS\24 OPERATION Browse	
	Document may be Word 97 or higher, OR pdf only.	
	<u>Save</u> <u>Cancel</u>	

The document displays in the list.

File Subsequent Doo	File Subsequent Document(s) into an existing Case						
Court Type: Trial Case #: 09000222CA				: County Civil			
Case #. 09000222CA	Case	Type: Landlord/tenan Eviction/Posses		. 40.00			
🔊 <u>C</u> ase Information	🙎 Parties	Documents	👩 <u>P</u> ayments	↑ <u>R</u> eview & Submit			
All required fields on this screen are marked with an asterisk (*). To attach a document click the Add Document link. After attaching your document, click SAVE, then click Add Document to add another document. Click NEXT to continue. <u>Do not</u> use your browser's arrow keys (upper left screen corner). For more information, click the Help link. Add Document							
#	Document Group	Document Type		Filing Fee			
Edit & Remove 1	Initial Pleading	Complaint		\$0.00			
Add Documents and select Next. <u>Next</u>							
Terms Of Use Privacy Statement Support? Problems with the site? © 2009 FACC Services Group							

The document screen also allows the filer to **Edit** or **Remove** a document. Clicking **Add Document** again allows the filer to add another document to the case.

When the filer has completed adding or editing all necessary document information, click the **Next** button.

Note: There is no additional payment required.

Review and Submit

Review all information carefully, clicking **Submit** is FINAL. If there are any edits or changes that need to be made, filer must click back to the **Case Information**, **Parties**, **Documents**, and/or **Payments** tab(s) to make the changes and re-save the information. Once any edits to information have been made, Click **Submit**.

ourt Type: Trial	County:	Columbia	Division:	County Civil
Case #: 09000222C	A Case Type:	Landlord/tenant / Eviction/Possesion	Total Fee:	\$0.00
) Case Information	🙎 Parties	Documents	na Payments	↑ <u>R</u> eview & Submit
eview Information shown belo	w and select submit. Submit	t		
Filer				
Address: Email Address: Phone Number:	vminer@flclerks.com			
Fee				
# Description				Amount
1 Filing fee				\$0.00
2 Initial Pleading Co	omplaint			\$0.00
		Тс	otal Filing Fees:	\$0.00
		Statutory Cor	nvenience Fee:	\$0.00
			Total:	\$0.00
Payments				
Payment Option: Credit Card/Account Number: Expiration Date: Parties				
# Type	Primary Name		Address	
Documents				
	• • -			
# Document Group	Document Type	Fil		
I Initial Pleading	Complaint	C:	\fakepath\Eviction	n Claim.doc
eview Information shown abo	ve and select submit. Submi	t		

User receives a Filing Received Confirmation upon successful filing.

New Case

Choose the New Case Link when filing a new case.

Account EFiling Options	Welcome - Brother Miner						
🖆 My Filings	Last signed in on - 03/02/2011 09:25:50 AM						
My Filing 😰 Organization Filings		News & Information This is a test of the					
* From (mn 📝 Existing Case	To (mm/dd/yyyy): 03/02/2011 🗰 🕻 <u>Refresh</u>	news system					
· · · · · · · · · · · · · · · · · · ·	vision Submission Date Completion Date	Miami-Dade Emergency Filings follow the same					
Change page: Simple E-File	Displaying page 1 of 1, items 0 to 0 of 0.	current procedures.					
🖂 Email Log		Miami-Dade - No new parties will be added via the ePortal					
Terms Of Use Privacy Statement Filer Documentation Support? Problems with the site? © 2011 FACC Services Group							

The filer will be taken to the case information screen.

Adding Case Information

eFilers can enter new case information. When the case information is reviewed by the county staff a case number will be assigned. The eFiler will receive a confirmation email regarding the filing and the new case number will be recorded in the email. Once the case number is assigned the 'My Filing' list will be populated with the case number in place of the 'new case' text.

From the available drop down menus select the following:

- Type of Court
- County
- Division
- Case Type
- Sub Type

Note: Items in the drop down lists are dependent on what is available on the ePortal and by the county. Initially the Type of Court dropdown contains only Trial court. As e-Filing continues other court types will be added to the court types allowing e-Filing. As a county begins participation in e-Filing they will be added to the County dropdown. If the county is not displayed in the dropdown they are not currently participating in e-Filing. Each County determines the Divisions participating in e-Filing. Not all divisions in a county may initially participate in e-filing. As a county be by a new division it will be listed in the dropdown for the county.

New Case							
Court Type: Trial Case #: New Case		Columbia Formal Administration / Petition for Administration InTestate Florida Resident	Division: Total Fee:				
🔊 Case Information 🙎 Par	ties 📄 D <u>o</u> cuments 🍓 <u>P</u> aymer	nts 🕂 <u>R</u> eview And Submit					
	een are marked with an asterisk ys (upper left screen corner), Fo			ck NEXT to continue. <u>Do not</u>			
* Type Of Cour	t * County	* Div	ision				
Trial	 Columbia 	 Proba 	ite	-			
* Case Type: Forr	mal Administration						
* Sub Type: Peti	ition for Administration InT	Festate Florida Resident		•			
# Description				Amount			
1 Filing fee				\$400.00			
Emergency Filing							
Terms Of Use Privacy Sta	tement Support? Problems v	with the site?		© 2009 FACC Services Group			

The filing fee amount(s) automatically calculate based on the selections made by the filer.

When complete, click on the **Next** button. The filer may move though the process by clicking on the Next button when each screen is complete or by clicking on the tabs (Case Information, Parties, Documents, Payments, Review And Submit.

Note: Emergency Filing flag – Each county may handle emergency filing differently. Please contact the county for information regarding the emergency filing processing procedure.

Adding / Editing Party Information

The filer is directed to the parties screen. Click Add Party to add a party to the case.

▲Account			Welcome - Last signed in on - 12/29/2010 08:31:10 AM
New Case			
Court Type: Trial	County:	Columbia	Division: Probate
Case #: New Case	Case Type:	Formal Administration / Petition for Administration InTestate Florida Resident	Total Fee: \$400.00
▲ Case Information 2 Parties Do	ocuments 🍓 Payme	nts <u>R</u> eview And Submit	
All required fields on this screen are ma use your browser's arrow keys (upper le			d this screen, click NEXT to continue. <u>Do not</u> elp link.
Add Party			
# Туре	Prima	ary Name	Address
		<u>N</u> ext	

Select **Role** and select either **Primary Party** or **Filed On Behalf of**. Complete all required fields. Click **Save**.

- Role Description of party's involvement in the case (defendant, petitioner, etc.)
- Primary Party Party with direct connection to the case.
- Filed On Behalf of Identifies the party that would be credited with the payment of the submitted fee. Party must be identified whenever fees are collected.

When adding a party you have 3 options:

- 1. Copy your account information into the party fields by pressing on the Copy from Current Filer option.
- 2. Search registered users and copy their information into the party fields by pressing on the Search Registered Filers option
- 3. Enter party information directly into the fields available.

In some cases the party may need to be served with documents. Service Options are provided to identify the type of service to be used to serve the documents. If electronic is chosen then an email is sent to the party email address with documents attached when the filing is submitted.

	New Party Select		-	Primary Party	Filed On Behalf of
ID State/License #:		_			
	Copy From Curre	nt Filer 🎤	Search Registe	ered Filers	
	You must enter either	person or org	anization name.		
	First	Middle	Last	Suffix	
* Person Name:					
OR Organization:					
Email Address:					
Address:					
City/ State/ Zip Code:		Select St	ate 🔹		
Phone #:		Format: ##	#-###-####		
Service Options:	Not Served				
	Save	Can	cel		

The party screen refreshes and the party that was just added will be displayed in the list.

	unt <u>È</u> iling) Opt	Welcome - Last signed in on - 12/29/2010 08:31:1			
lew C	ase					
Court Ty	/pe: Trial			County:	Columbia	Division: Probate
Court Type: Trial Case #: New Case			C		Formal Administration / Petition for Administration InTestate Florida Resident	Total Fee: \$400.00
👌 Case I	nformation 🙎	Part			nts 1 Review And Submit	this screen, click NEXT to continue. Do no
					more information, click the He	
	browser's arrow					
use your	browser's arrow		s (upper left scree		more information, click the He	
use your	browser's arrow	w keys	s (upper left scree	n corner). For	more information, click the He	lp link.
use your	browser's arrow	w keys	s (upper left scree	n corner). For Prima	more information, click the He	lp link.
use your	browser's arrow	w keys	s (upper left scree	n corner). For Prima	more information, click the He	lp link.
use your	browser's arrow	w keys	s (upper left scree	n corner). For Prima	more information, click the He	lp link.

The party screen also allows the filer to Edit or **Remove** a party on a case. Clicking **Add Party** again allows the filer to add another party to the case.

When the filer has completed adding or editing all necessary party information, click the Next button.

Adding Documents

The filer is directed to the documents screen. Click Add Document to add a document to the case.

New Case							
Court Type: Trial	County:	Columbia	Division:	Probate			
Case #: New Case	Case Type:	Formal Administration / Petition for Administration InTestate Florida Resident	Total Fee:	\$400.00			
🔊 Case Information 🙎 Parties 📄	Documents 🍓 Payme	nts					
All required fields on this screen are marked with an asterisk (*). To attach a document click the Add Document link. After attaching your document, click SAVE, then click Add Document to add another document. Click NEXT to continue. <u>Do not</u> use your browser's arrow keys (upper left screen corner). For more information, click the Help link.							
Add Document							
# Doc	ument Group Doc	ument Type		Filing Fee			
No Documents							
		Next					

Select the **Document Group**, **Document Type**, **# Pages** and select the document. To select a document click **Browse**, select the document and attach document. Click **Save**.

Document		
Document #:	New Document Filing Fee:\$0.00	
* Document Group:	Initial Pleading	•
* Document Type:	Petition for Administration	•
* # Pages:	3	
* Select Document:	C:\Users\vminer\Clericus VSS\24 OPERATION Browse	
	Document may be Word 97 or higher, OR pdf only.	
	<u>S</u> ave <u>C</u> ancel	

The document will display in the list.

New C	Case							
Court T	ype: Trial		Сог	unty:	Columbia	Divisio	n: Probate	
Cas	e #: New C	ase	Case T	уре:	Formal Administration / Petition for Administration InTestate Florida Resident	Total Fe	e: \$400.00	
🔊 Case I	Information 🚦	Partie	es 📄 D <u>o</u> cuments 👩 <u>F</u>	ayme	nts <u>R</u> eview And Submit			
All required fields on this screen are marked with an asterisk (*). To attach a document click the Add Document link. After attaching your document, click SAVE, then click Add Document to add another document. Click NEXT to continue. <u>Do not</u> use your browser's arrow keys (upper left screen corner). For more information, click the Help link.								
Auu D	ocument	-		_	_			
		#	Document Group	Doc	iment Type		Filing Fee	
屠 Edit	🗯 Remove	1	Initial Pleading	Petit	ion for Administration		\$0.00	
Next								

The document screen also allows the filer to **Edit** or **Remove** a document. Clicking **Add Document** again allows the filer to add another document to the case.

When the filer has completed adding or editing all necessary document information, click the **Next** button.

Payment

The filer is directed to the payment screen. There are three payment options: credit card, check or fee waiver. Enter *only* one form of payment.

New Cees

New Case							
Court Type: Trial	County: Columbia	Division: Probate					
Case #: New Case	Case Type: Formal Adminis	stration / Total Fee: \$400.00					
🔊 Case Information 🙎 Parties 📄 Do	ocuments 👩 Payments 🟫 Review And	l Submit					
Select ONE payment option, then click Fields marked with an asterisk (*) are							
Credit Card Type	(Check Routing Number					
Credit Card Number CVV	J	Checking Account Number					
Expiration Date Month Yea	ar r	Name on Account					
	•						
There is a 3% statutory convenience fe via electronic check (direct debit from a	ee for payments made via credit card. The	Account Type C Checking C Savings e statutory convenience fee for payments m	nade				
Fee Information			~				
# Description		Amoun	t				
1 Filing fee 2 Initial Pleadina Petition fo		\$400.0 \$0.0 Total Filing Fees: \$400.0 Convenience Fee: \$0.0 Total: \$400.0 \$400.0 \$400.0 \$400.0 \$400.0	0 0 0				
Total: \$400.00 There is a 3% statutory convenience fee for payments made via credit card. The statutory convenience fee for payments made via electronic check (direct debit from a bank account) is \$3.00.							
Request Fee Waiver?	Waiver Reason:						
Attach completed Fee Waiver	form: Browse	e					
	e to download Fee Waiver Form						
	lease provide credit card or Checking Acc	count Information.					
Select ONE payment option, then click	k NEXT to continue <u>N</u> ext						

A breakdown of the filing fees are listed in the Fee Information portion of the screen.

The filer may elect to use a credit card or e-check. Only one payment method is allowed. Once a user enters their payment information, the payment information is stored for future use.

The filer may request a Waiver of the fees by completing the bottom portion of the screen.

Note: An explanation of how the convenience fee is calculated is stated in red text below the fee total.



What is C.V.V.? It is a 3 to 4 digit code found on the back of the credit card.

When the filer has completed adding all necessary payment information, click the **Next** button.

When the user clicks on the Submit button on the Review And Submit screen the credit card or check routing information are verified with the appropriate institution. Successful verification will place a hold on the funds until the clerk reviews and accepts the filing.

Review and Submit all information carefully, clicking **Submit** is FINAL. If there are any edits or changes that need to be made, filer must click back to the **Case Information**, **Parties**, **Documents**, and/or **Payments** tab(s) to make the changes and re-save the information. Once any edits to information have been made, Click **Submit**.

ourt Type: Trial	County:	Columbia	Division:	Probate	
Case #: New Case	Case Type:	Formal Administration /	Total Fee:	\$412.00	
🕽 Case Information 🙎 Parties 🗌) D <u>o</u> cuments 🍓 <u>P</u> aymen	ts <mark>个 <u>R</u>eview And Submit</mark>			
eview Information shown below and	select submit. Submi	t			
Filer					
Name: Min	er				
Address:					
Email Address: vmi Phone Number:	ner@flclerks.com				
Fee					
				Amount	
# Description				Amount	
1 Filing fee	for Administration			\$400.00	
2 Initial Pleading Petition	n for Administration			\$0.00	
		Total Fi	ling Fees:	\$400.00	
		Statutory Convenie	ence Fee:	\$12.00	
There is a 3% statutory convenience electronic check (direct debit from		via credit card. The statutory	Total: convenience fee	\$412.00 a for payments made via	
Payments					
Payment Option: Pay Credit Card/Account XXX Number:					
Expiration Date: 04/2	2013				
Parties					
# Туре	Primary Name	Ade	dress		
1	No				
Documents					
# Document Group Doc	ument Type	File			
1 Initial Pleading Peti	tion for Administratio	- 16 1	oath\Damage		

If the filer has failed to enter required information they will receive a pop up message providing information on what is missing. The filing is not submitted if required data is not entered.

The filer will receive a Filing Received Confirmation upon successful filing.

Confirmations

In total, the filer receives three (3) Confirmations during the filing process:

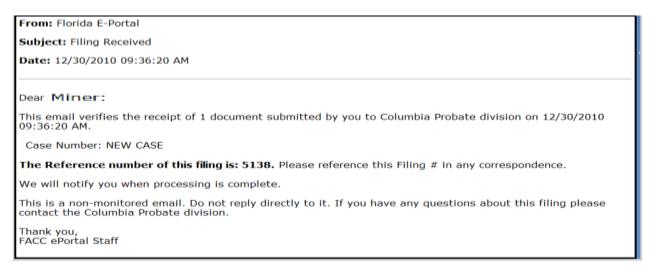
1. The Filing Received Confirmation screen:

Immediately upon submitting the filing the filer will receive a confirmation notice. This notice provides the filing reference number. This number is needed if the filer contacts the county regarding the filing prior to a case number being assigned to the filing.

Filing Received Confirmation							News & Information This is an FACC non-	
1 document is successfully submitted for filing to Trial Court for Columbia County, Florida Probate Division Case # you have provided is NEW CASE Reference # for this filing is 5138 Important: If you should contact the court about any document in this filing, please provide this Filing # to help us locate this filing.							branded page item.	
			<u>Sul</u>	omit a ne	<u>w simple</u>	<u>efiling</u>		
Re	ecent Fil	lings						
	Refresh							
	Filing #	Case #	Status	County	Division	Submission Date	Completion Date	
±	5138	NEW CASE	Received	Columbia	Probate	12/30/2010 09:36:20 AM		
								×

2. An Email:

The filer receives an email regarding the filing in their email client account based on the email addresses in their profile. This email is also in the Email Log / Notifications in the ePortal.



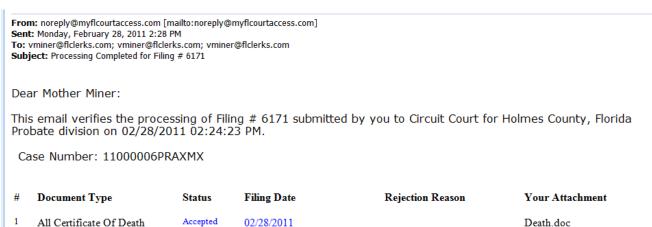
3. The document displays in **My Filings** (notice there is no **Completion Date** at this time.)

When the filer returns to the My Filings listing the new filing is displayed in the list.

2	<u>A</u> ccour	Velcome - - 12/29/2010 08:31:10 AM						
My	y Filin	News & Information						
* From (mm/dd/yyyy): 12/27/2010 . To (mm/dd/yyyy): 12/30/2010 . Refresh								This is an FACC non- branded page item.
	Filing #	Case #	Status	County	Division	Submission Date	Completion Date	
+	5138	NEW CASE	Pending Review	Columbia	Probate	12/30/2010 09:36:20 AM		
+	5092	NEW CASE	Pending Review	Alachua	Circuit Civil	12/28/2010 09:27:00 AM		
Change page: Previous 1 Next Displaying page 1 of 1, items 1 to 2 of 2.								
Т	erms Of U	l <u>se Privacy St</u>	atement Supp	ort? Pro	blems with t	the site?	(2009 FACC Services Group

Clerk Review

After the Clerk completes the review of the filing, the user receives another email verifying that the filing was processed successfully.



2 All Petition For Formal Accepted 02/28/2011 PetitionFA.doc Administration

This is a non-monitored email. Do not reply directly to it. If you have any questions about this filing, please contact the please contact the Circuit Court for Holmes County, Florida Probate division.

Thank you, FACC ePortal Staff

The document now appears in My Filings with the Completion Date populated.

		My Filings							
From	This is a test of the news system								
Filing	# Case #	Status	County	Division	Submission Date	Completion Date	Miami-Dade Emergency Filings follow the same		
6175	11000008PRAXMX	Filed	Holmes	Probate	02/28/2011 03:12:23 PM	02/28/2011 03:15:06 PM			
6174	11000007CVAXMX	Filed	Holmes	Probate	02/28/2011 02:59:36 PM	02/28/2011 03:01:53 PM	Miami-Dade - No new		
6173	1000008PR	Filed	Holmes	Probate	02/28/2011 02:40:02 PM	02/28/2011 02:41:14 PM	parties will be added the ePortal		
6171	11000006PRAXMX	Filed	Holmes	Probate	02/28/2011 02:24:23 PM	02/28/2011 02:27:25 PM			
6167	1000008CC	Being Reviewed	Holmes	Probate	02/28/2011 01:53:19 PM				
Change p	age: 🐧 Previous 1 Next	•			Displaying page	e 1 of 1, items 1 to 5 of 5.			

Simple E-File:

Selecting Simple E-File from the Filing Options allows the user to file documents with the court.

<u> A</u> ccount	ount <u>Filing Options</u>		Welcome - Brother Miner Last signed in on - 03/02/2011 09:25:50 AM				
	P	My Filings			Last signed in on	- 03/02/2011 09:25:50 AM	
My Filing	P	Organization Filings				News & Information	
* From (mn		Existing Case	To (mi	m/dd/yyyy): 03/02/2011	🔤 🕅 👯 <u>Refresh</u>	news system	
Filing #	6	New Case	vision	Submission Date	Completion Date	Miami-Dade Emergency Filings follow the same	
No records to Change page:	8	Simple E-File		Displaying	page 1 of 1, items 0 to 0 of 0.	current procedures.	
		Email Log				parties will be added via the ePortal	
Terms Of Use Privacy Statement Filer Documentation Support? Problems with the site? © 2011 FACC Services Group							

Select **Type of Court**, **County** and **Division** from the drop downs.

Check the New Case box if the filing is to be used to generate a new case.

If this filing is to be applied to an existing case enter the case number.

Click on the Browse button to locate and select your document for filing. Once the document is selected click on Add file to add the document to the filing

Simple E-File	
To Add a file, select the file using browse button and click add To Remove a file	e, click delete icon next to the file
Fields marked with asterisk (*) are required.	
* Type Of Court * County * Div	ision
Circuit Columbia Selec	t
New Case * Case Number: Exa	mple 09 000200 CA
Browse 🗟 Add File	
# File	
Emergency Filing	
Submit	
Terms Of Use Privacy Statement Support? Problems with the site?	© 2009 FACC Services Group

Note: Items in the drop down lists are dependent on what is available on the ePortal and by the county. Initially the Type of Court dropdown contains only Trial court. As e-Filing continues other court types will be added to the court types allowing e-Filing. As a county begins participation in e-Filing they will be added to the County dropdown. If the county is not displayed in the dropdown they are not currently participating in e-Filing. Each County determines the Divisions participating in e-Filing. Not all divisions in a county may initially participate in e-filing. As a county brings up a new division it will be listed in the dropdown for the county.

Note: Emergency Filing flag – Each county may handle emergency filing differently. Please contact the county for information regarding the emergency filing processing procedure.

Click on **Browse...** and select the file to be submitted. When the file name is displayed click on Add File to add the file to the Simple E-File.

Simple E-File									
To Add a file, select the file using browse button and click add To Remove a file, click delete icon next to the file									
Fields marked with asterisk (*) are required.									
* Type Of Court * County	* Division								
Circuit 🔹 Columbia	Select 🔹								
☑New Case * Case Number: charged for filing fees.	Payment information on file with Judiciary will be								
C:\Users\vminer\Clericus VSS\24 OPERATIONAL REPO Browse									
# File									
Remove 1 C:\fakepath\Marriage Monthly Rept DH 133.pdf									
Emergency Filing									
<u>S</u> ubn	it								
Terms Of Use Privacy Statement Support? Problems with the site	2 © 2009 FACC Services Group								

The document added will be displayed in the listing below the Browse button.

The filer may remove the document from the list by clicking on the X Remove option next to the document path and name.

Click on **Submit** when all documents for this case have been selected.

Once submitted, the user will receive the confirmation notice.

Notifications

The **Notifications** link opens the **Email Log** which stores a record of all the filer's emails sorted in date order. This functionality allows filers to be able to view all their emails generated by the portal without requiring the filer to access an email client.

Notifications sent by ePortal include:

- Initial notification of registration
- Notification to Activate your account
- Notification of password change
- Notification of document rejection (initiated by the filing county)
- Notification of processed filing

Ema	ail L	_og					
This so	creen	is a log of all emails sent to you	u by this e-filing system.				
	0	From	Subject	Submitted			
	Sub	mitted: 12/28/2010					
Florida E-Portal		Florida E-Portal	Filing Received	12/28/2010 09:27:00 AM			
Ξ	Sub	bmitted: 12/23/2010					
		12/23/2010 09:32:06 AM					
Fror	n: F	lorida E-Portal					
Sub	ject	Filing Received					
Date	e: 12	2/28/2010 09:27:00 AM					
Dep	e la IN-	liner:					
Dear		inner:					
		ail verifies the receipt of 1) AM.	document submitted by you to	Alachua Circuit Civil division on 12/28/2010)		

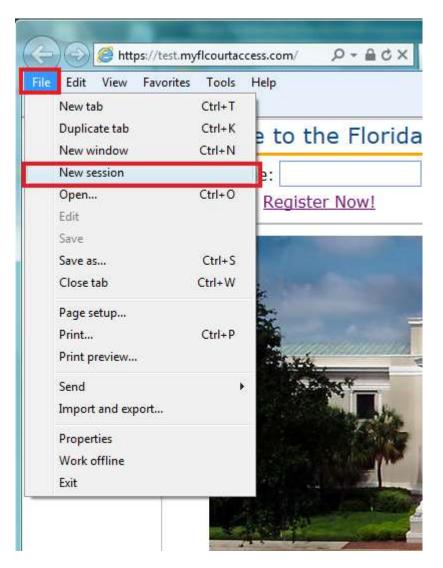
Note: If a filer deletes an email from their email client, the email still remains in this Email Log.

Open Multiple ePortal Sessions

When opening multiple sessions of the ePortal <u>do not</u> open them in tabs in the same Internet Browser session. Instead open a new Internet Browser Session.

In the open browser window

- Click on File
- Click on New Session



Frequently Asked Questions

1. Why does my county not show in the dropdown list for filing?

As a county begins participation in e-Filing they will be added to the County dropdown. If the county is not displayed in the dropdown they are not currently participating in e-Filing. Each County determines the Divisions participating in e-Filing. Not all divisions in a county may initially participate in e-filing. As a county brings up a new division it will be listed in the dropdown for the county.

2. Why does my filing division for the county not show in the dropdown list for filing?

Each County determines the Divisions participating in e-Filing. Not all divisions in a county may initially participate in e-filing. As a county brings up a new division it will be listed in the dropdown for the county.

3. Why does my document type not show in the dropdown list for filing?

Each County determines the documents they will accept via e-Filing. As a county accepts a new document type it will be listed in the dropdown for the county. Contact the county in which you are filing regarding your document type.

4. Why is the existing case information not displaying? I have verified the case number.

Existing case information is displayed if the county's case management system is linked to the ePortal for case retrieval. Not all counties have or will initiate this link. If the link is not active the existing case information will not be displayed.

Case information on a case having the privacy level of Confidential or higher will not be retrieved from CCIS and may not be retrieved from the county case management system.

5. Describe if and how electronic signatures will be utilized.

The ePortal system operates in accordance with the Supreme Courts' Administrative Order (AO09-30) for the use of "/s" in lieu of electronic signatures. A pleading or other document is not required to bear the electronic image of the handwritten signature or an encrypted signature of the attorney, but may be signed in the following manner when electronically filed through an attorney's login and password:

s/ John Doe John Doe (e-mail address) Bar Number 12345 Attorney for (Plaintiff/Defendant) XYZ Company ABC Law Firm 123 South Street Orlando, FL 32800 Telephone: (407) 123-4567

6. I received an email that my registration was pending approval. Who can assist me in getting my account activated?

Contact support@flclerks.com - an administrator can activate an ePortal registration.

7. I received an email that my filing was rejected. Who can assist me?

Filing rejection emails are sent out by the county to which the filing was submitted. Contact the county clerk's office for more information regarding your filing.