



State Agency Clerk Filer User Manual

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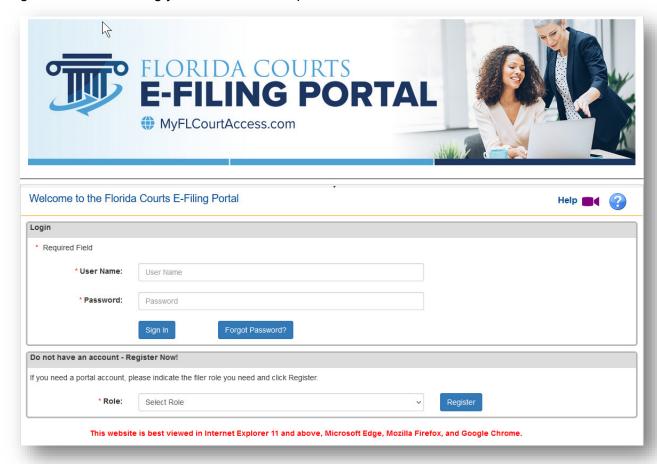
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#### **Overview**

The Florida Courts E-Filing Portal (Portal) will accept submissions to all jurisdictions via this single point of entry. You may submit to the Trial Courts, District Courts of Appeal and The Florida Supreme Court. This User Manual will focus primarily on the File Notice of Appeal and Submit Record on Appeal filing process. For more in-depth information on the Clerk Review process, please see the Portal County Administrator User manual.

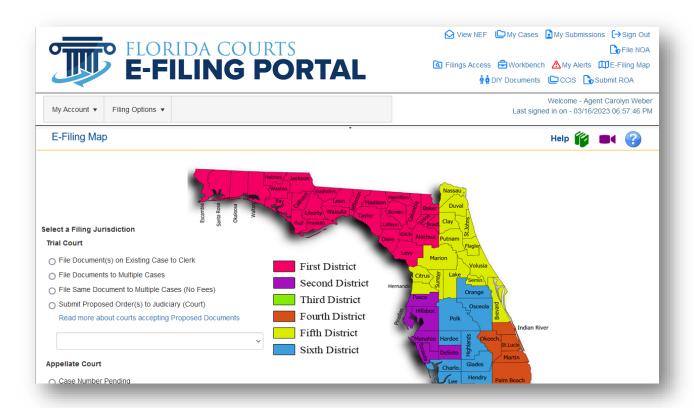
# **Logging Into the Portal**

Log into the Portal using your username and password.



If you have any Alerts pending, you will be taken automatically to the **My Alerts** page. If you have no Alerts pending, you will land at the **Home Page** you selected in your account preferences.

If you have not set your **Preferences** for the Portal in the My Account menu, you will se the **E-Filing Map** when you log in as a State Agency Clerk to file a Notice of Appeal.



### Menu Bar and Quick Links

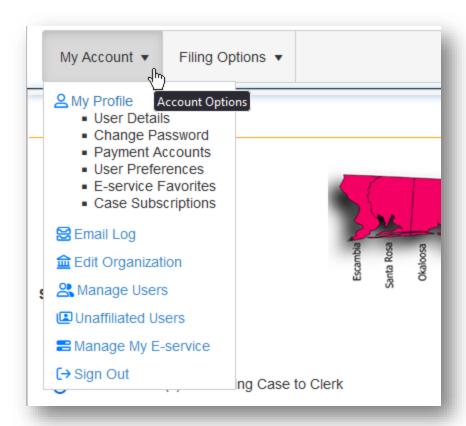
At the top of the page, you will see the Menu Bar and the Quick Links which are in the upper right-hand corner of the page.



Let's look at the My Account menu.

### **Account Menu**

From the My Account menu, you have access to the following sub-menu items.

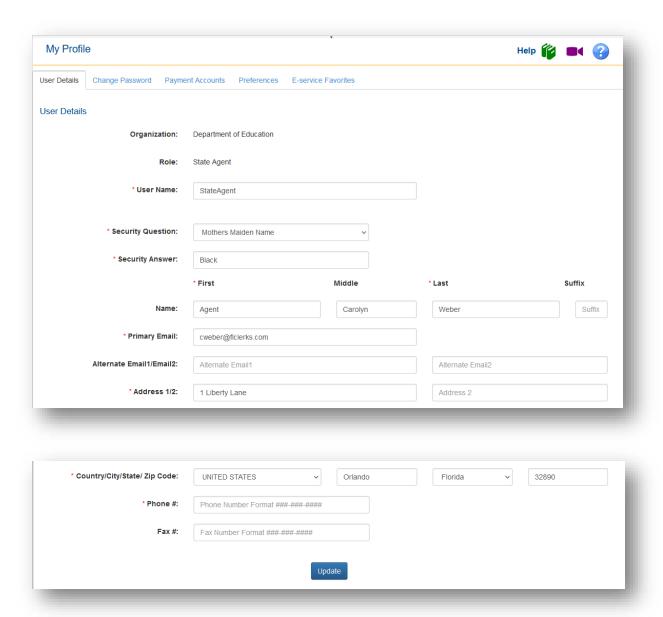


# **My Profile**

The State Agency Clerks access their My Profile page to review and update any personal information and to set Preferences for the Portal.

#### **User Details**

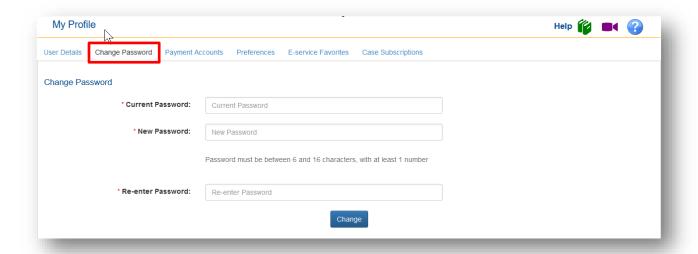
The User Details page allows you to update your username, address information and any email addresses associated with your Portal profile.



After all changes are made, be sure to click on **Update** to embed the changes.

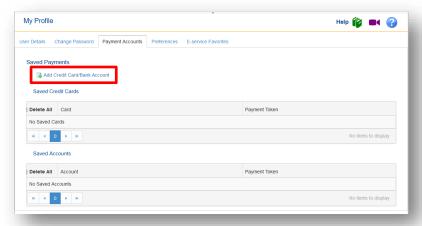
#### **Change Password**

To change your current password, on the My Account menu select My Profile, **Change Password**. Type in your Current Password and then type in your New Password. Re-enter your New Password and then click on Change. Next time you log into the Portal, you will need to use your New Password.



#### **Payment Accounts**

This will not apply to the State Agency Clerk filer. If you were to ever need to submit a fee, the **Payment Accounts** tab would be where you would enter your payment information.



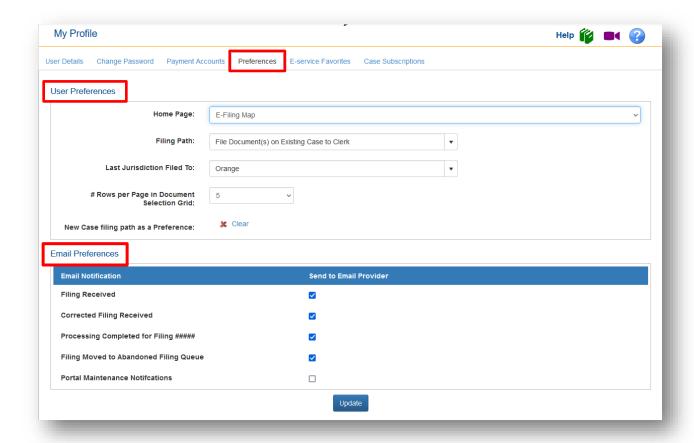
#### **Preferences**

A State Agency Clerk may select some preferences to be set as a default at log in User Preferences

- Home Page
- Filing Path
- ➤ Last Jurisdiction File To
- # Rows Per Page in Document Selection Grid
- New Case Filing Path as a Preference

#### **Email Preferences**

- Filing Received
- Corrected Filing Received
- Processing Completed for Filing #####
- > Filing Moved to Abandoned Filing Queue
- Portal Maintenance Notifications

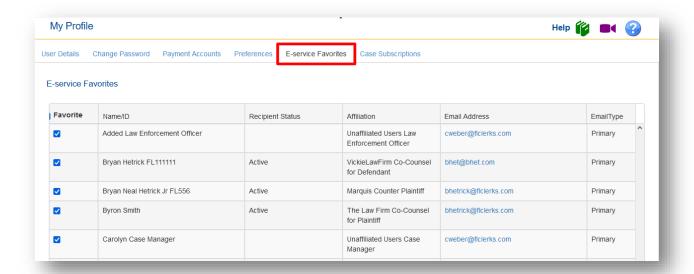


Once you have made your selections, click on **Update** and then **OK**.

**NOTE:** You will always be taken to the **My Alerts** page when you log into the Portal if you have an alert pending. Once all alerts have been resolved, you will then land on the default Home Page you selected in your Profile Preferences. If no selection is made in your Preference tab, then you will land at the **E-Filing Map** which is by default the Portal Home Page.

#### **E-service Favorites**

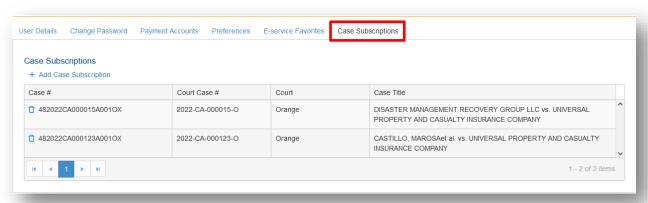
You as the State Agency Clerk Filer can now create an E-service Favorites list. As you add Other Attorney/Interested Parties to an E-service List, you can also add them to your E-service Favorites List. Then you will be able to quickly add them to any E-service List. Your E-service Favorites will be listed under this tab.



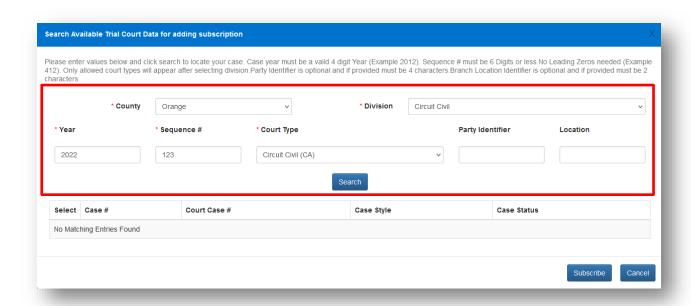
To remove a person from your E-service Favorites list simply remove the check mark under the **Favorite** column and click on Update. They will not be removed from your list but when you select to add from your E-service Favorites, they will not be listed.

#### **Case Subscriptions**

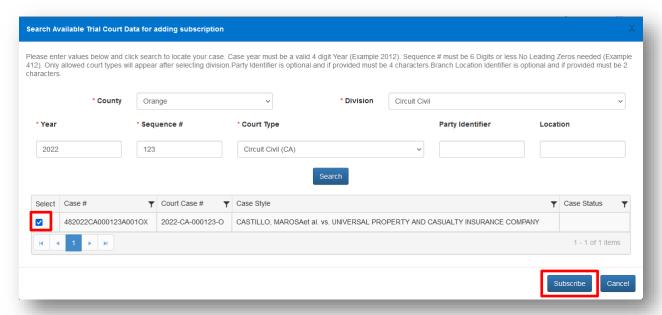
You may now add Circuit and County Civil cases to your **Case Subscriptions** page that will send you an email notification of case activity.



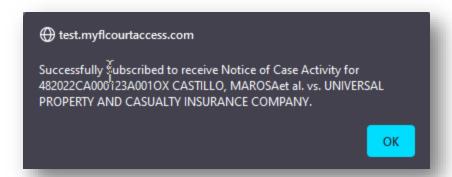
To add a case to your Case Subscription list, click on **+Add Case Subscription**. The **Search Available Trial Court Data for adding subscription** dialog box will open. Complete the required information and then click on **Search**.



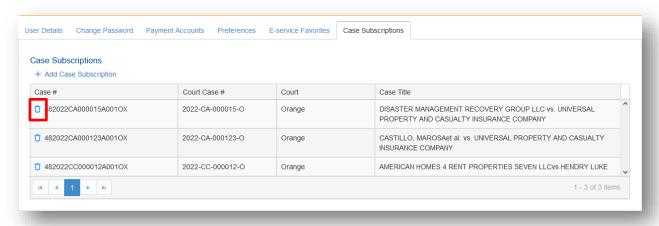
The Portal will pull up the results of your Search and allow you to Select the case. Place a check in the box under the **Select** column and then click on **Subscribe**.



You will receive confirmation of your selection. Click **OK**.

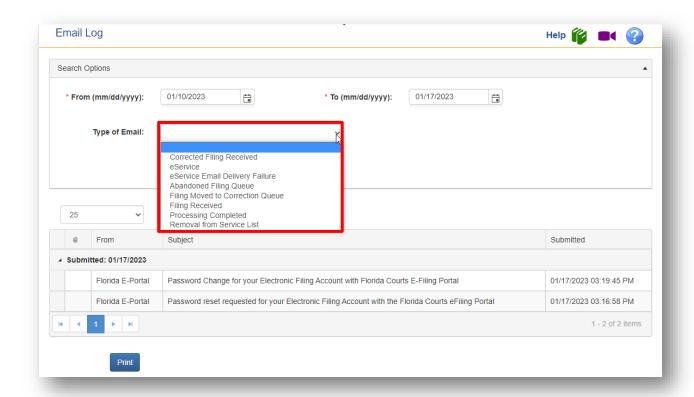


That will add your case to your Case Subscriptions list. From now on, you will receive an email notifying you of any case activity. To remove a case from the list, click the trash can icon to the left of the Case #.

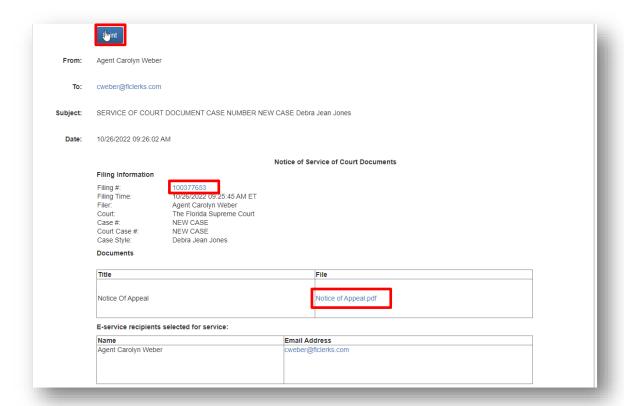


### **Email Log**

The Clerk also has access to your **Email Log** which houses all the email you will also receive in your Email provider account. There is search functionality available to search by the Type of Email.



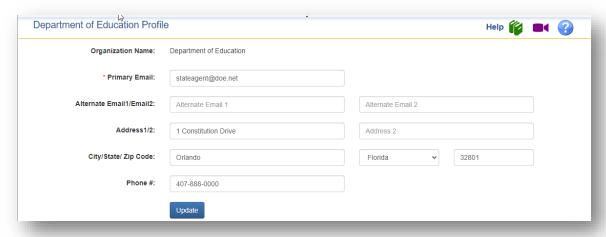
Highlight the email you wish to view and scroll down the page to see the email. The Service of Court Documents email will have the body of the email and will contain links to the documents if you are the filer. If you are not the filer, there will be no link available in the Email Log. You can print the E-service email or any email you wish to print.



To print the document(s) in the Notification of Electronic Filing (NEF), click on the Filing # link. This will allow you to download all documents in the submission as a zip file. To download the documents individually, select the name of the document under the File column as captured above.

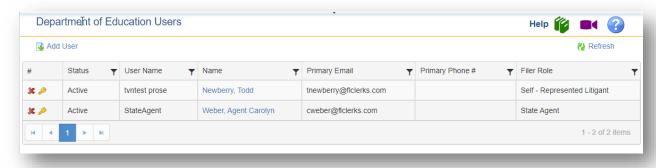
### **Edit Organization**

As the Organization Administrator, you can update the address and email accounts associated with the organization. Make any necessary changes and click Update to embed the changes.



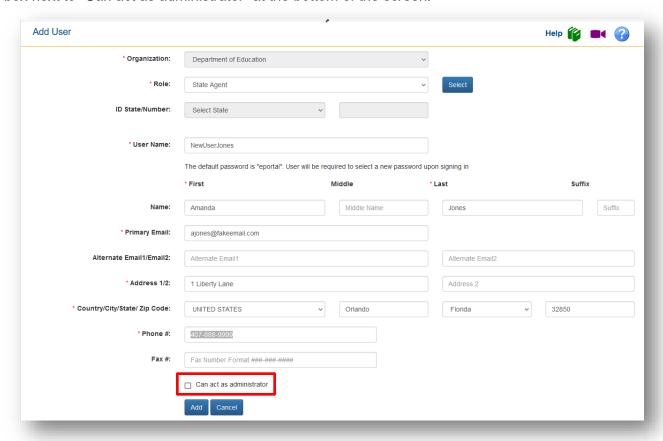
### **Manage Users**

To add a new user, deactivate a user in your organization, or reset a user's password, you will use the **Manage Users** menu under the My Account menu button on the menu bar.



#### Add New User

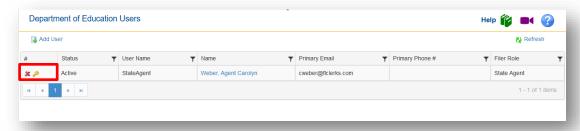
Click on the Add User link and complete the account information. The required fields have a red asterisk next to them. If you want the new user to also be an administrator, place a check in the box next to "Can act as administrator" at the bottom of the screen.



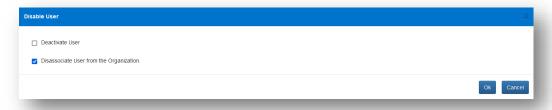
Then click on Add. An email will be sent to the new user with a link to complete the registration.

#### Deactivate a User

Click the red "x" located at the far-left side of the screen next to the user you wish to deactivate or remove from your organization.



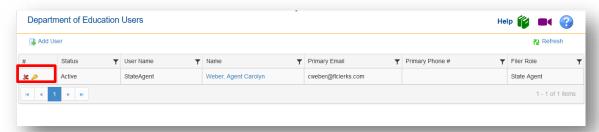
When you click on the red "x". the following message box will appear. Select to "Disassociate User from Organization" to remove them from your organization but still allow them to file electronically through the Portal. Then click on **OK**.



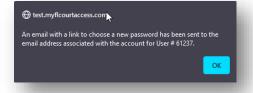
This will remove the selected user from the organization.

#### Change Password

If one of your users forgets their password, you can send a link to that user which will allow them to reset their password. Click on the yellow key in the far-left hand column shown below.

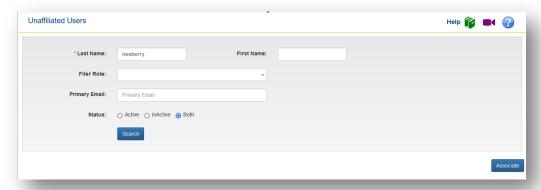


You will receive a message box that lets you know an email link to choose a new password has been sent to the email address associated with the account for the user you selected.

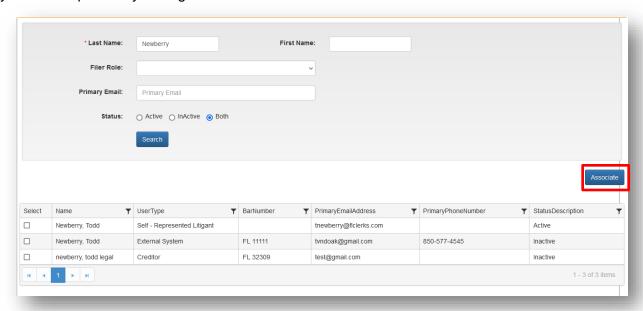


#### **Add Unaffiliated Users**

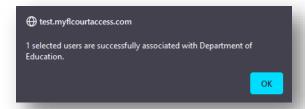
To add a person who already has a Portal account to your organization, use the Unaffiliated Users sub-menu in the My Account menu on the menu bar. Type in the Last Name and do a Search to pull up a list of Portal Users that have that last name.



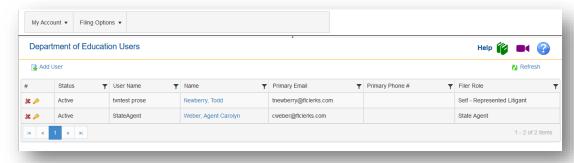
The Search Results will appear below the Search Options box and allow you to select the user you wish to pull into your organization.



Once you have selected the correct person, click on **Associate**. You will receive a message advising you that the user you selected has been successfully associated with your organization.

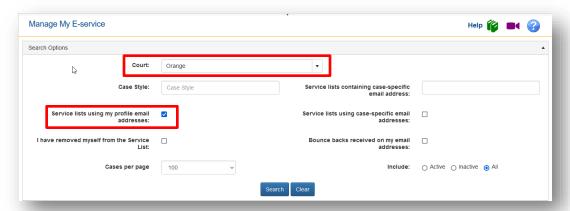


Now when you to go Manage Users you will see the unaffiliated user now part of your organization.

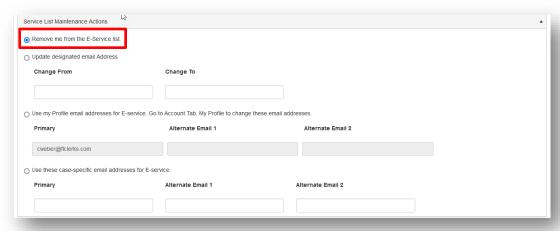


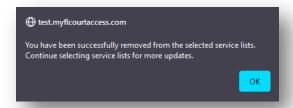
# **Manage My E-Service**

This link allows you to manage how or if you receive E-service on your cases. If you need to remove yourself from an E-service list or multiple E-service lists, you can do so using this submenu on the My Account menu on the menu bar. Select your Search Options and then click on Search.



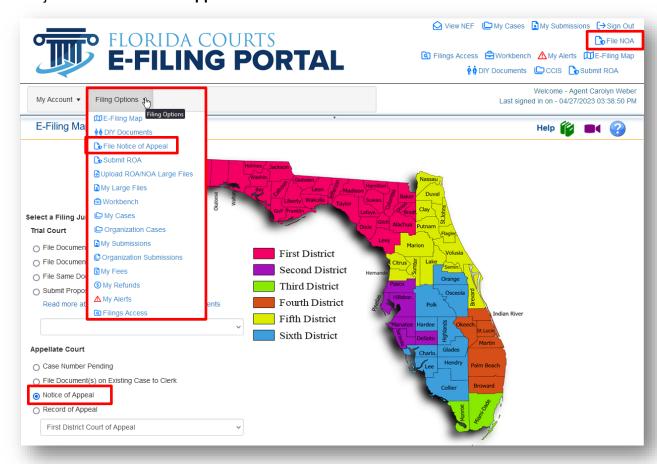
Next select the Maintenance Action you wish taken with the list of cases returned in your Result Set. Click on Update.



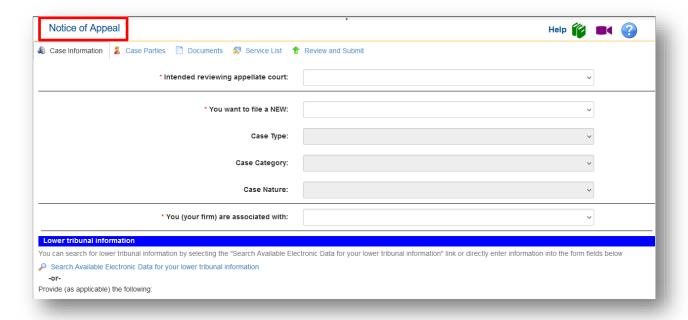


# File Notice of Appeal

To file a Notice of Appeal with the District Courts of Appeal or The Florida Supreme Court, go to **File Notice of Appeal** in the **Filing Options** tab, or select the icon **File NOA** in the Quick Links located on the right-hand side of the page, or in the E-Filing Map select under the Appellate Court jurisdiction **Notice of Appeal**.

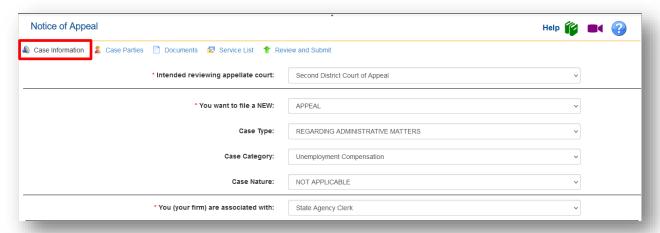


You will be taken to the Notice of Appeal filing path using any of the above options.



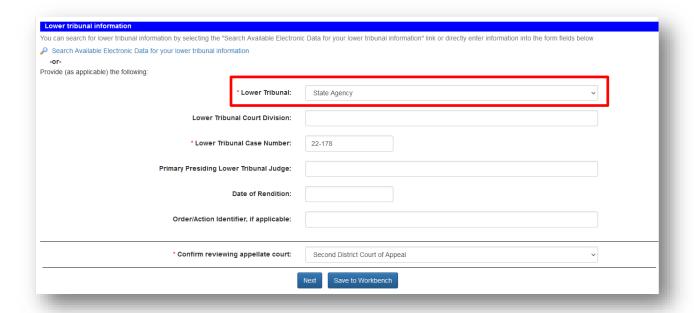
#### **Case Information**

Select the intended reviewing appellate court; select what you are filing, designate the case type, case category and case nature by selecting from the dropdowns.



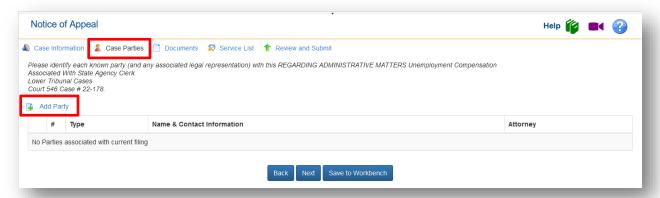
#### **Lower Tribunal Information**

Then select State Agency as the Lower Tribunal using the dropdown. Then type in the Lower Tribunal Case Number. Finally, Confirm the Reviewing Appellate Court which should be the same as the Intended Reviewing Appellate Court at the top of this page. Then click on **Next**.

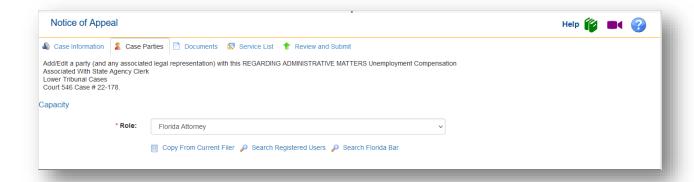


#### **Add Party Information**

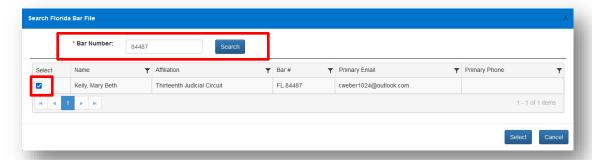
The **Case Parties** tab will be available for the Florida Supreme Court and the First District Court of Appeal only until all DCAs are on their new Case Maintenance System, C-Track. As the DCAs move to C-Track, the **Case Parties** tab will be enabled. To add the Party information, Click on **Add Party**.



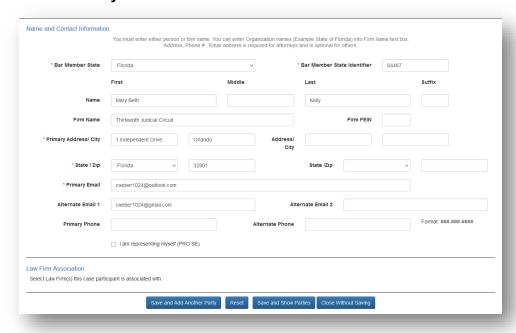
Select the Role by using the drop-down and then complete the appropriate information. Go through the page below to add all the parties to your case. Begin with adding the Florida Attorney who is representing the party filing the Notice of Appeal, if there is one. Then add the parties and make the association as to the Florida Attorney filing on behalf of the Appellant, etc. Select **Save and Add Another Party** as you add all the parties to the case. When done adding all your parties, click on **Save and Show Parties**.



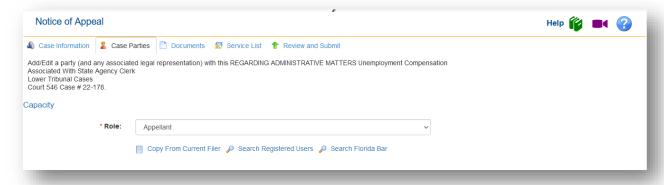
To add the attorney information, you may select Search Registered Users or Search Florida Bar. Type in the Florida Bar number to pull up the Florida Attorney. Select the attorney and then click on Select.



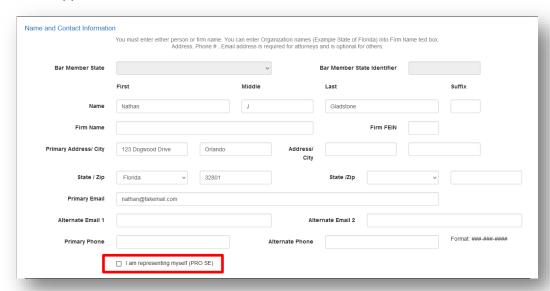
When you click on Select, the Florida Bar information will populate the Name and Contact Information for the Florida Attorney. When you are ready to add another party click on **Save and Add Another Party**.



Now you are ready to add another party. From the Role dropdown, select Appellant.



Type in the Appellant information.

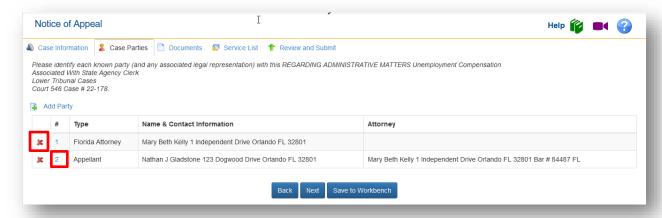


Make the Attorney Association or if the Appellant is representing themselves check the box in the Name and Contact Information section "I am representing myself (PRO SE)" as shown above.



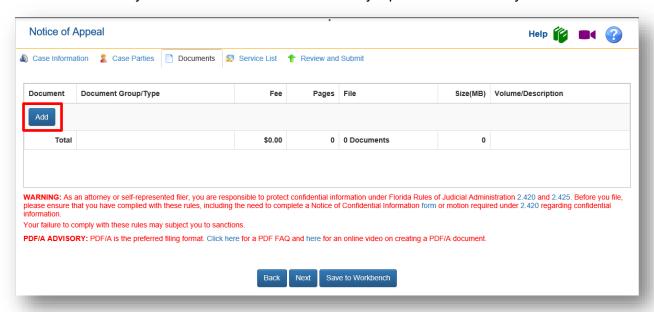
Then click on **Save and Add Another Party** or if all parties have been added you should select **Save and Show Parties**. Your parties will be shown on the Case Parties tab. If you need to delete a party simply click on the Red "X". To edit a party, click on the blue hyperlinked number

and make any changes you need to make. When all parties are correct you are now ready to move forward to the Documents tab. You may either select **Next** or click the **Documents** tab.

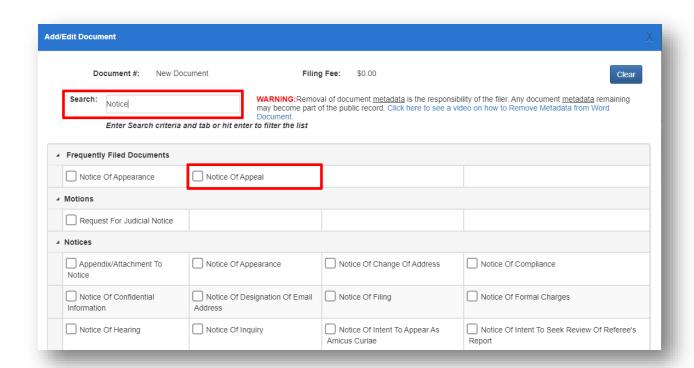


#### **Attaching Documents**

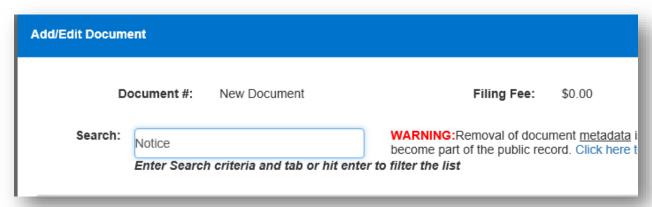
Next you will add the documents you need to submit to the District Court of Appeal to create the new case. Mandatory documents will be listed as will any Optional Documents you need to file.



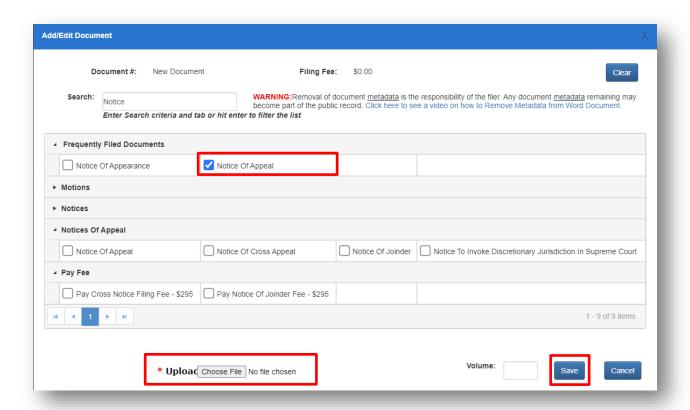
Click on **Add** and type in the search box the name of the document you will be filing or search the list of documents by selecting the page numbers at the bottom of the screen.



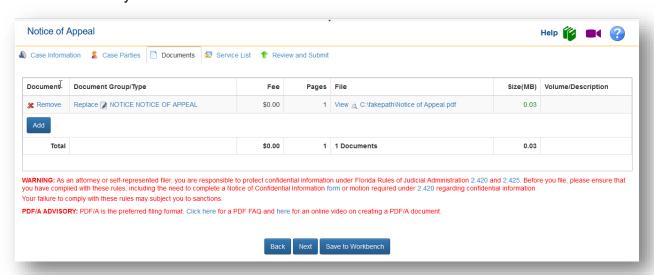
If you use the search field and type in the word and either **Tab** or **Enter** to filter the list.



Then select the document you will be submitting and browse out onto your computer where you have saved the document to attach it to the submission. Then click on **Save**.



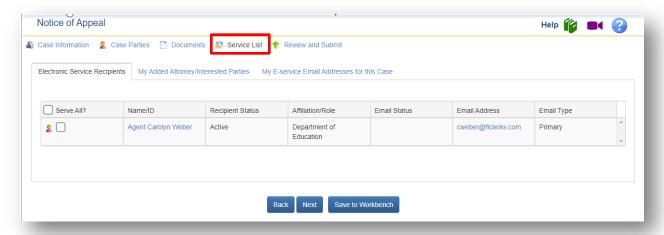
#### The Portal will add your document to the list.



Repeat the above process to upload all the documents you are sending to the District Court of Appeals or The Florida Supreme Court. The submissions size for the Notice of Appeal filing path for the Second, Third, Fourth, Fifth and Sixth District Courts of Appeal is 500MB max. The maximum submission size for the First District Court of Appeal and The Florida Supreme Court is 200 MB. After you have uploaded all your documents and are ready to move forward, click on Next or click the Service List tab.

#### **Service List**

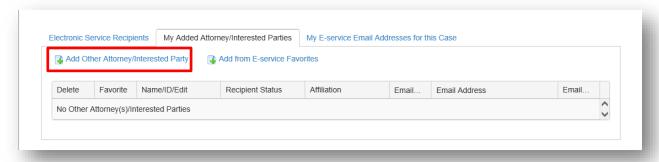
Now you have access to the **Service List** page. Select the E-service Recipients that should receive **notice** of your filing or add any other attorney or interested party that should be served these documents.



To add another attorney or an interested party to the E-service List select the **My Added Attorney/Interested Parties** link.



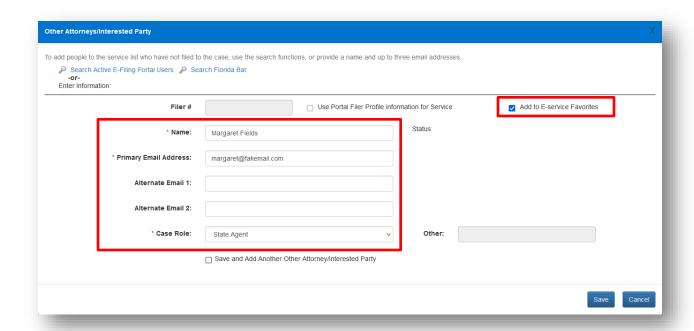
Then select Add Other Attorney/Interested Party.



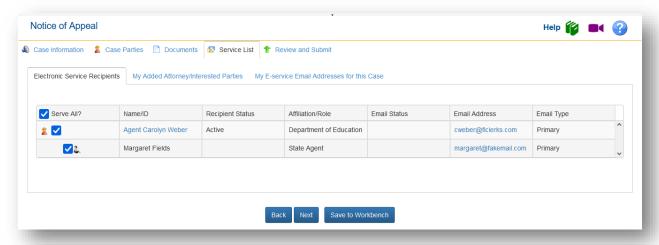
You have four options to enter the Other Attorney/Interested Party information:

- Search Active E-Filing Portal Users by selecting the link and typing in the required information
- 2. **Search Florida Bar** by selecting the link and typing in The Florida Bar number of the attorney you are searching
- 3. Typing in the fields the Name and at least a Primary Email Address of the attorney you are adding
- 4. Adding Other Attorney/Interested Party from your E-service Favorites list.

We will add another State Agent to receive E-service of this Notice of Appeal and add this State Agent to the filer's E-service Favorites.



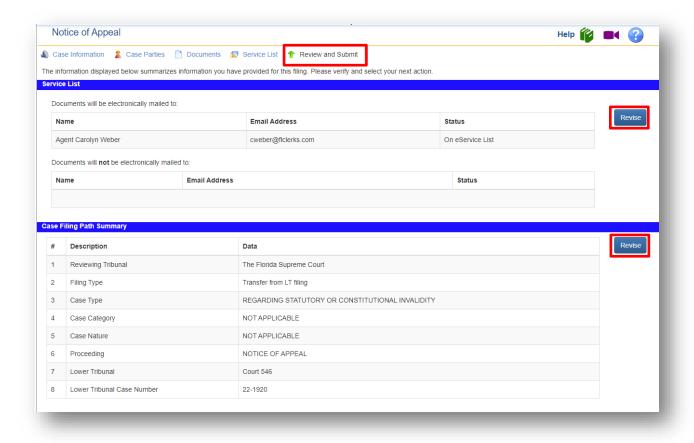
As you can see below, the new State Agent has been added to the E-service List and selected for service. You are now ready to move on to Review and Submit.

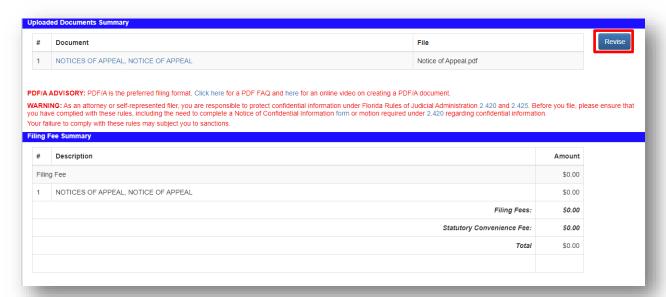


#### **Review and Submit**

The **Review and Submit** page gives you the opportunity to review and revise any incorrect information. Verify that all the E-service recipients are listed and if someone else needs to be added click on **Revise** and add more E-service recipients.

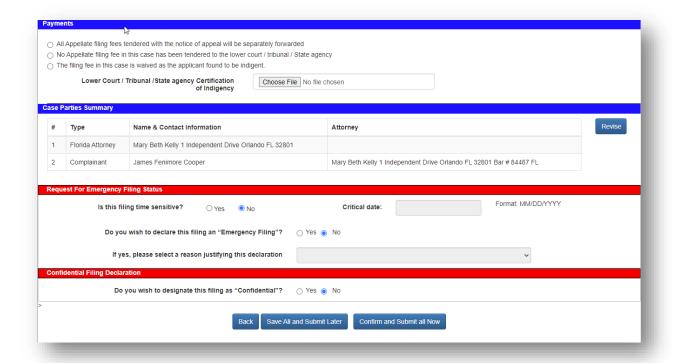
The Case Filing Path Summary and Uploaded Documents Summary also gives you the opportunity to make sure all information is accurate. If not, click on **Revise** and make any necessary changes.





The **Filing Fee Summary** shows the fees associated with this Notice of Appeal. The **Payments** section allows you to make a designation as to the status of any fees. Make sure you select what is appropriate. You may also revise any incorrect Party information.

Finally, you can **Request For Emergency Filing Status** and also designate the submission as a **Confidential Filing**. If you are requesting emergency filing status, you must provide the **Critical date**. You also must select a reason justifying this declaration as shown below.



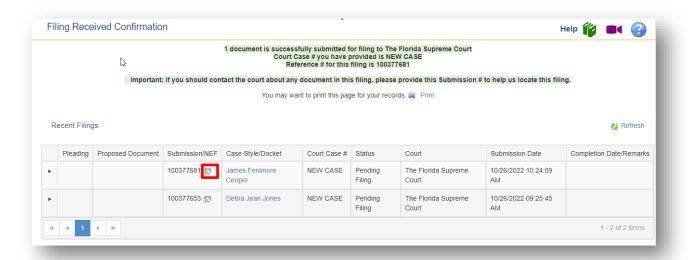
Then if you are ready to submit your Notice of Appeal to a District Court of Appeal or The Florida Supreme Court, click on **Confirm and Submit all Now**. If you select **Save All and Submit Later** this will be saved to your Workbench.

If you select **Continue and Submit all Now** you will then be taken to the **Filing Received Confirmation** page where you will see the status of your submission.

#### **Filing Confirmation Page**



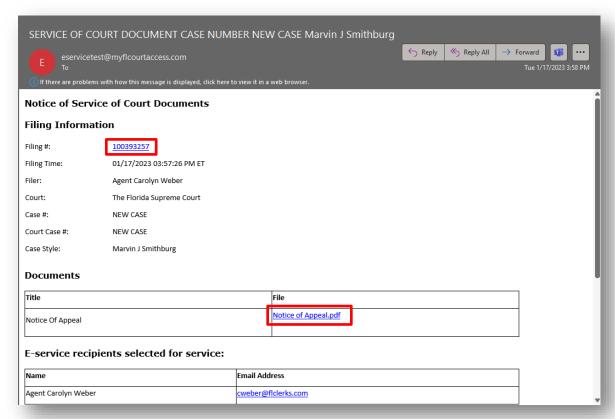
When the Notification of Electronic Filing icon appears under the Submission/NEF column, Eservice will have been provided to all the Eservice Recipients in this case.



You will also receive a Filing Received email in your email provider advising you of all the filing information contained in your submission.

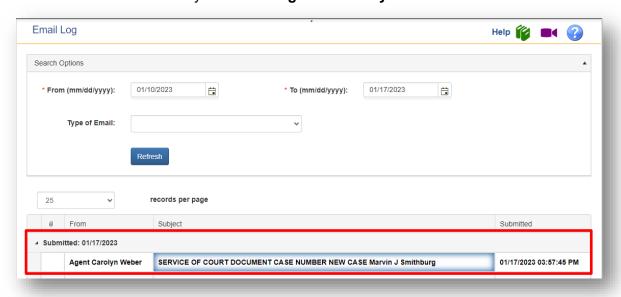


If you include yourself in the E-service Recipient list, you will receive an E-service email along with a link to the document(s) submitted that will have the official file stamp date and time located at the top of the document.



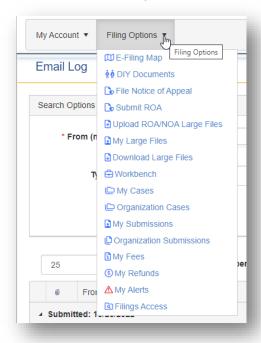
#### **Email Log**

This email is also available in your **Email Log** under the **My Account** menu on the Menu Bar.



# Filing Options in the Quick Links

From the Filing Options menu on the Menu Bar, you will have access to the following:



From the Quick Links you will also have access to the following:



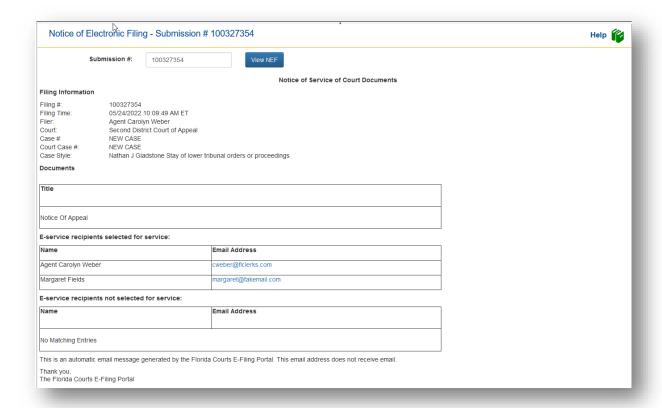
Let's look at the options in the Quick Links.

#### **View NEF**

This will allow you to view the Notification of Filing that sends out E-service. Type in the Submission Number and then click on **View NEF**.

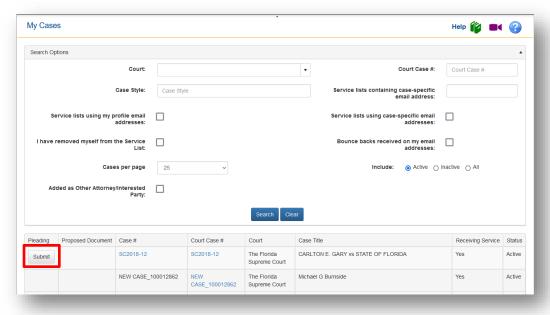


This will display the Notification of Filing (NEF) that was sent out to provide E-service on the above submission number.

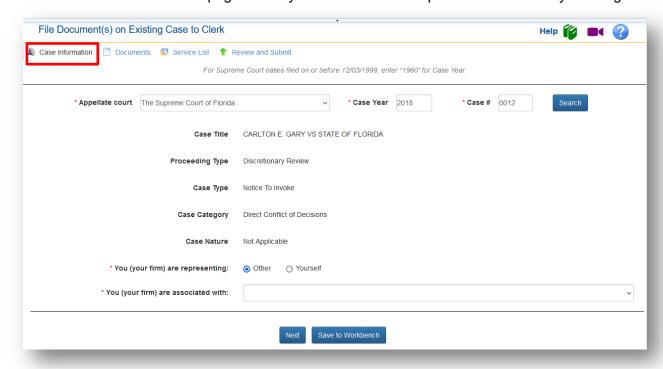


### My Cases

As a filer you now will have a **My Cases** page in the Portal. This will list all of the cases in which you have filed to electronically. After you have filed electronically to a case, it will be added to your My Cases page so that if you need to file any follow-up filings to that case you may do so by using the **Submit** button as shown below.



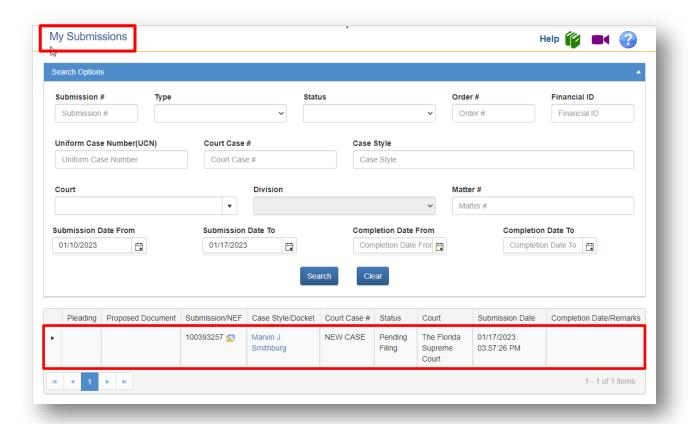
Click on the **Submit** button and it will take you to the Pleading on Existing Case filing path and land on the **Case Information** page where you can continue the process and submit your filing.



# **My Submissions**

You will also have access to your **My Submissions** page in the Portal. This will list by default all the submissions you have made during the past seven days. To show more information, adjust the date fields. Your **My Submissions** page will retain the submission information for the past 90 days.

You may use the **Search Options** to perform a search on any of the items listed. Selecting the Case Style will open the official court file and display the docket sheet and the documents therein.



Once the Status column shows the new case number when a new case is submitted, you will have access to the court file and the documents therein by clicking on the **Case Style/Docket** hyperlink.



#### File NOA

This was discussed previously in this User Manual. Please go to page 15 to see how to file your **Notice of Appeal.** 

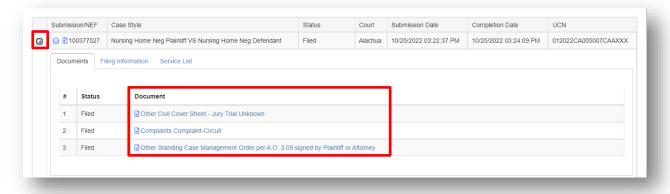
# **Filings Access**

The Filings Access page will provide you a Portal user access to statewide, non-confidential circuit and county civil case initiation submissions and the documents therein. The link to the documents will be available on this page for five (5) days from the date of submission. The documents available on this webpage have not been accepted by the Clerk and are not official court documents. Upon acceptance by the Clerk, the official documents will be available at the Clerk's office or, with a few exceptions, on the Clerk's website or in the Portal in the My Cases page.

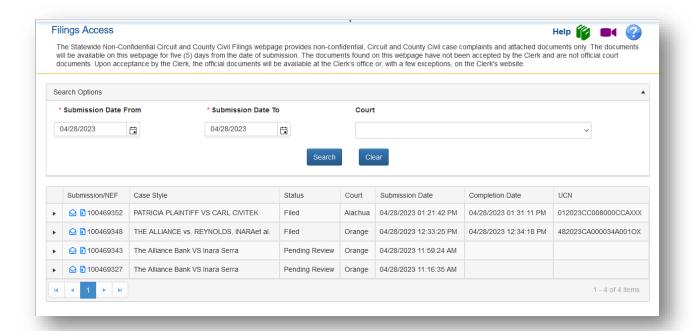
The case initiation submission will be displayed in reverse chronological order – most recent to the oldest. You may search by date and by county. A link to download all documents within the submission as a zip file is provided as shown below.



You may also select the documents individually by clicking the carat next to the Submission/NEF column. Then select the Document tab and select each document.



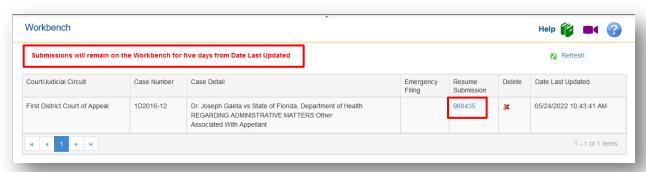
The statewide view will be the default when you access this Filings Access page.



The submission will reflect the status so that when it is accepted by the Clerk the status will change to **Filed** and the **Completion Date** and **UCN** (Uniform Case Number) will be provided. When the UCN is available the "official" court document(s) will be available at the Clerk's website or at the Clerk's Office.

# My Workbench

This takes you to **My Workbench** where if you **Save and File Later** you will be able to resume filing your submission by clicking on the **Resume Submission** link.

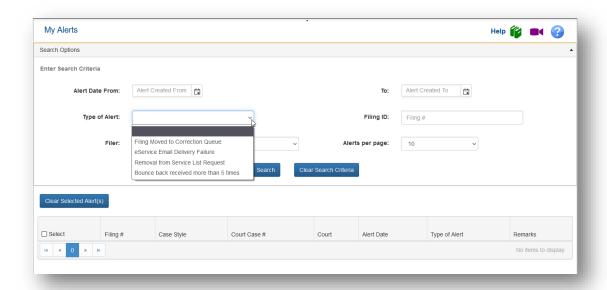


Items will be purged from the Workbench five days from the Date Last Updated date.

### **Mv Alerts**

When you log in to the Portal, you will be taken to the **My Alerts** page if there are any filer Alerts that pertain to your filings. In the screen shot below, you will see what classifies as an Alert.

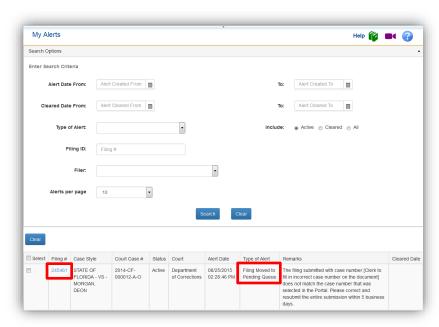
- Filing Moved to Correction Queue
- E-service Email Delivery Failure
- Remove from Service List Request
- Bounce Bank Received More than 5 Times



You have many Search Options available to you to sort out the filer Alerts you have received.

- Alert Date From
- Alert Date To
- · Type of Alert
- Filing ID
- Filer
- Alerts per page

To clear this My Alert page, for submissions sent to the Correction Queue click on the Filing ID #.

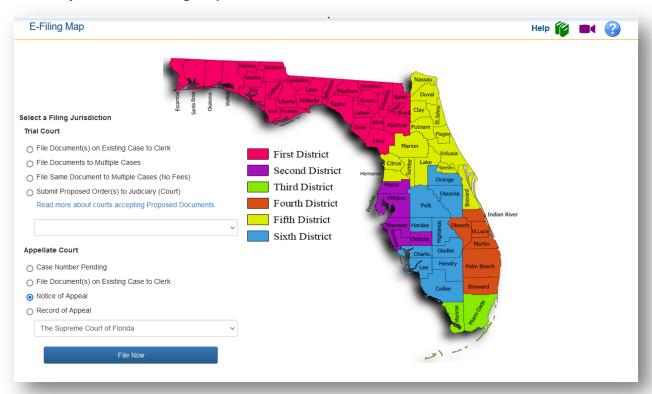


That will take you to your **My Submissions** page where you can click on Filing # and correct the deficiency and submit the filing. Once submitted, it will be cleared from your **My Alerts** page.

Once all Alerts have been resolved or cleared, you will again be taken to the Home Page designated in your Preferences. If you have any Alerts pending, when you log in to the Portal you will be immediately taken to the **My Alerts** page. If you do not wish to resolve your Alerts at that time, you can always select a page from the **Quick Links** to go to.

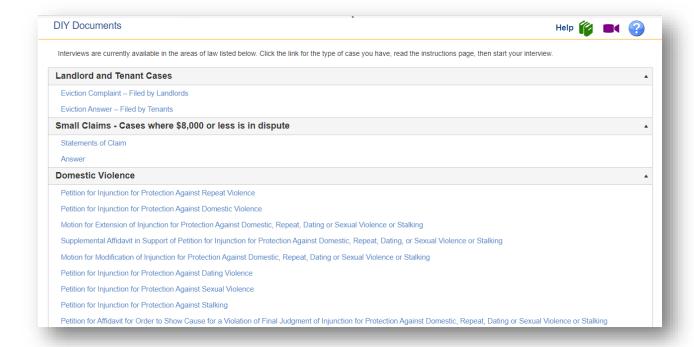
### **E-Filing Map**

This takes you to the **E-Filing Map**.

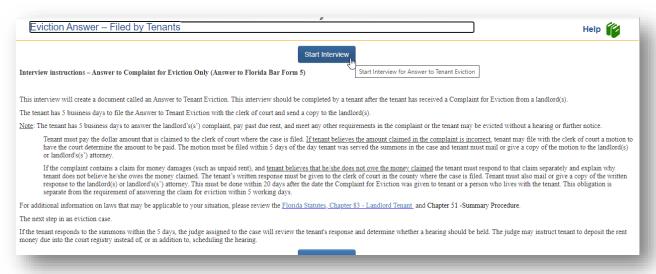


### **DIY Documents**

This link will take you to the Do It Yourself (DIY) documents page where you will be able to select an interview to complete which will generate a document that you may file. When you select the document you wish to generate, an interview process will begin that will ask you questions and with your answers generate the document.



When you have read the Interview Instructions and are ready to begin the interview, click Start Interview.



You will be taken to the a2j interview generation page where you will walk yourself through the creation of the document you wish to file.



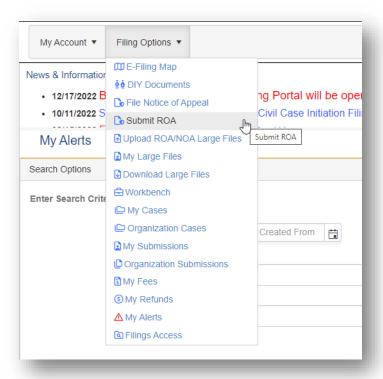
Once you complete the interview, you may print your document, or you may file your document electronically through the Portal.

### **CCIS**

The CCIS link will take you to the Comprehensive Case Information System. Currently this is for Governmental use only. It is anticipated that it will be available for the public at a later date.

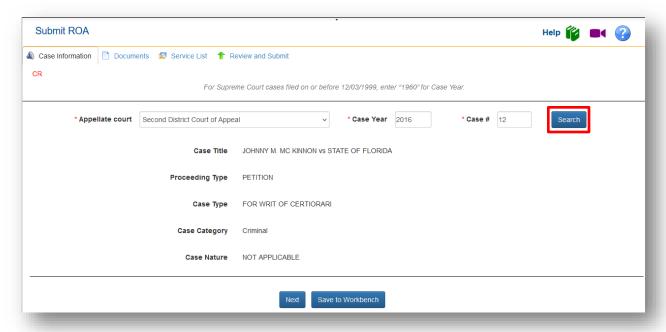
# **Submit ROA (Record on Appeal)**

From the Quick Links tab select Submit ROA or from the Filing Options select Submit ROA.



#### **Case Information**

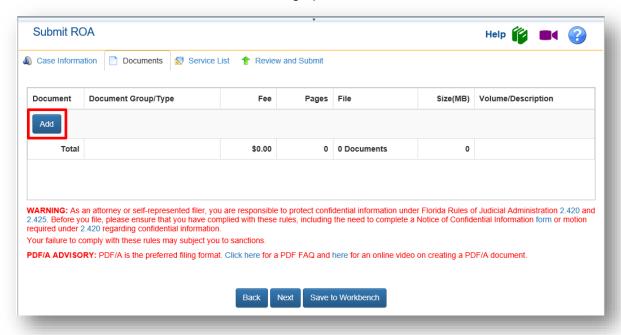
From the Case Information page select the **District Court of Appeal or the Florida Supreme Court** from the drop down and then type in the Case Year and Case Number. Then click on **Search**.



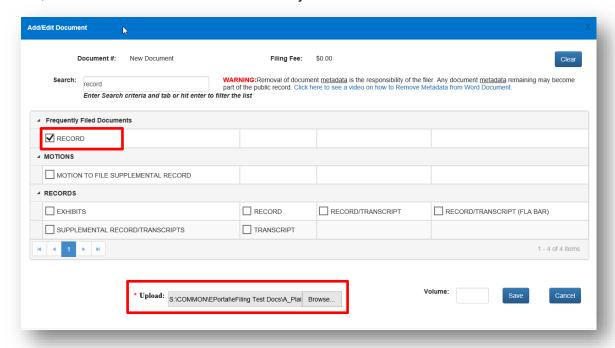
Then select **Next** or click on **Documents** in the menu bar to move to the documents tab.

### **Documents**

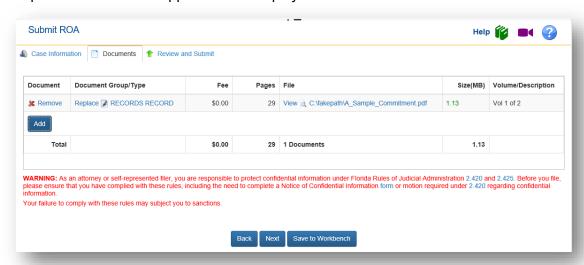
From the Documents tab click on **Add** to bring up the Add/Edit Document list.



Select the Record from the list and upload the PDF Record on Appeal. You may upload up to **500MB** in the submission to the **Submit ROA** filing path for the Second, Third, Fourth, Fifth and Sixth District Courts of Appeal. For the First District Court of Appeal and The Florida Supreme Court, the maximum size of a submission may not exceed **200 MB**.

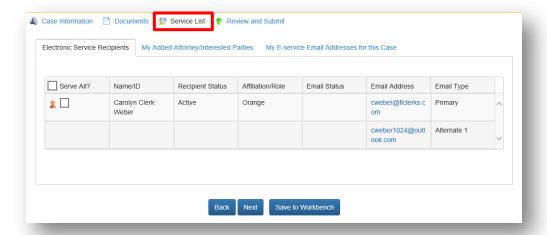


The uploaded Record on Appeal will be displayed on the Documents tab.



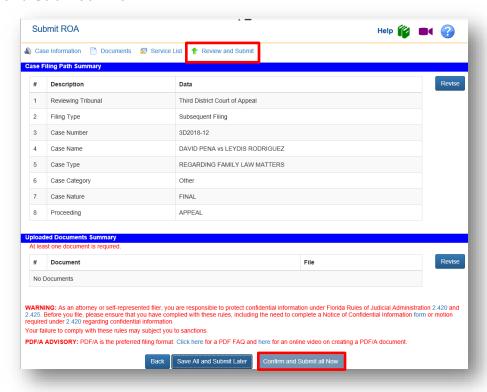
#### **E-service Tab**

There will be no E-service of the record on appeal through the Portal. The Notification of Electronic Filing (NEF) will be a **notification only** that the record on appeal has been submitted. Anyone who wants to view the record will have to log into EDCA to view the record on appeal. The NEF will go out to all the E-service Recipients.



#### **Review and Submit**

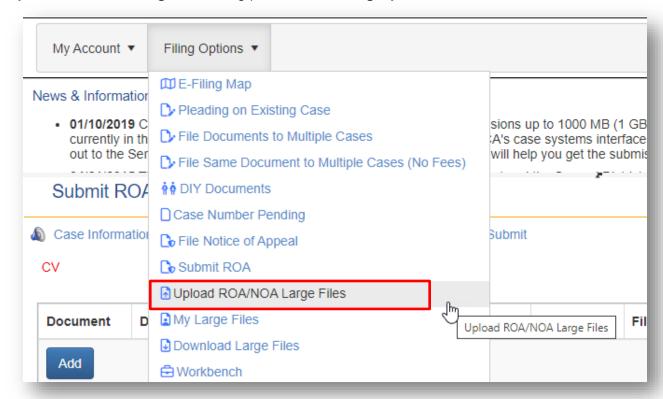
You are now ready to submit your Record on Appeal to the Florida Supreme Court. Click on **Confirm and Submit all Now**.



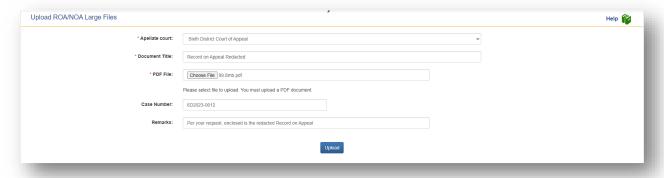
You will then be taken to the Filing Received Confirmation page where you will see your submission to the Florida Supreme Court. It will also be on your My Submissions page and added to you My Cases page as well.

# **Upload ROA/NOA Large Files**

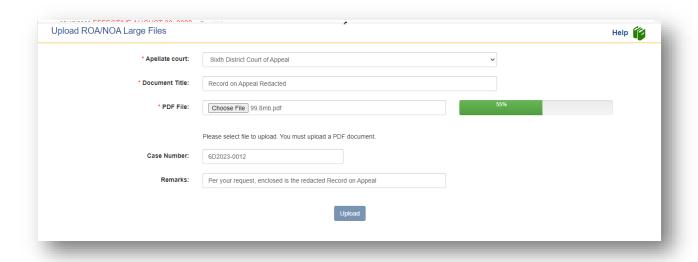
If your file is larger than **500 MB** for the Second, Third, Fourth, Fifth and Sixth District Courts of Appeal please use the **Upload ROA/NOA Large Files** filing path. For the First District Court of Appeal and The Florida Supreme Court, if the file size is larger than **200 MB**, please use the **Upload ROA/NOA Large Files** filing path. Select **Filing Options** from the menu bar.

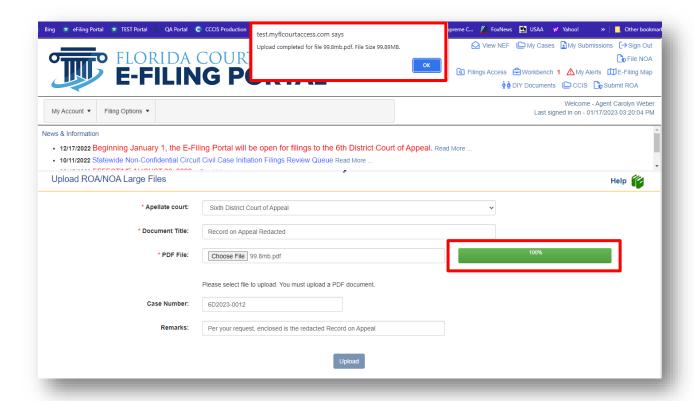


Complete the appropriate fields with the correct information.

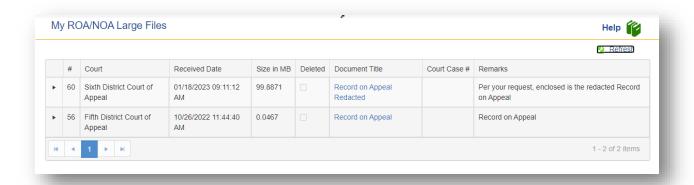


Then click on **Upload**. You will receive a message when the upload has been completed.

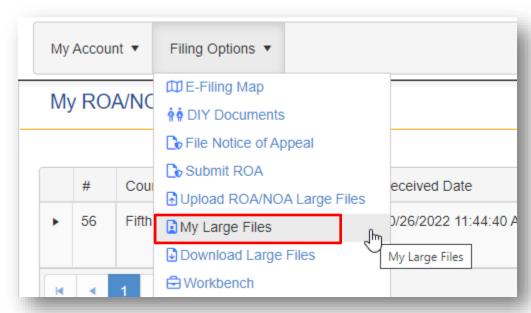




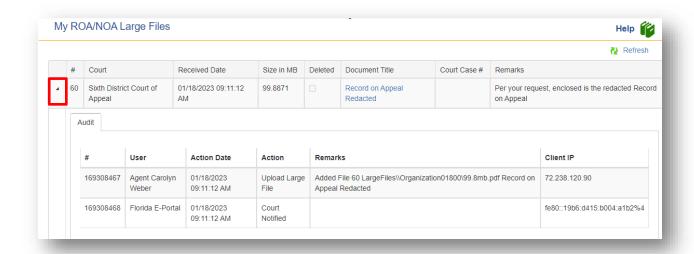
Click **OK** and it will take you to your **My ROA/NOA Large Files** so you can see the list of large files you have sent off.



You can easily get to this list by using the **Filing Options** drop down and selecting **My Large Files**.



To view the audit trail for the Large File, click on the carat to the left of the # column. You will see the "Action" that has been taken on this submission.



You will be able to see when the Court downloads the file and when or if it is deleted.