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#### Introduction

The purpose of this user manual is to provide you, the Portal Filer, with the information necessary to electronically file court case documents via the Florida Courts E-Filing Portal (Portal). This User Manual will walk you through the process of registering as a new filer, managing your user account, filing documents through the Portal, making payments for filings submitted via the Portal and viewing the court file and the documents therein.

As with documentation for any evolving system, this document will be revised as necessary to reflect modifications and enhancements to the Portal.

# **Video Tutorials**

WebEx video tutorials are available on the Florida Courts E-Filing Portal website (<a href="https://www.myflcourtaccess.com/authority/training-videos">https://www.myflcourtaccess.com/authority/training-videos</a>) covering all common E-Filing tasks. These videos may be used in conjunction with this manual for maximizing E-Filing orientation and education.

# **E-Filing Videos**

# **Attorney E-Filing Instructional Videos**

- The Florida Courts E-Filing Portal 17 mins (1/2022)
- The Florida Courts E-Filing Portal-Portal Help Menu 3 mins (1/2022)
- The Florida Courts E-Filing Portal Register for an Account 3 mins (5/13/2022)
- Florida Courts E-Filing Portal Setting Profile Preferences 9 mins (1/1/2020)
- Florida Courts E-Filing Portal My Submissions 2016 5 mins (6/2016)
- Florida Courts E-Filing Portal My Cases 7 mins (6/2016)
- Florida Courts E-Filing Portal Filing to a New Case 15 mins (5/13/2020)
- Florida Courts E-Filing Portal Filing a Pleading to an Existing Case 10 mins (5/13/2020)
- Florida Courts E-Filing Portal Fees and Payments 4 mins (6/5/2014)
- Florida Courts E-Filing Portal File a New Case to Florida Supreme Court 17 mins (10/23/2014)
- File to the District Courts of Appeal 9 mins (5/12/20)
- Creating the E-Service List 7 mins (5/12/2020)
- Florida Courts E-Filing Portal Correction Queue 4 mins (1/1/2020)
- Florida Courts E-Filing Portal Updated News & Information 3 mins (5/12/2020)
- Florida Courts E-Filing Portal Removing Metadata from WORD Documents 2 mins (5/20/2015)
- Florida Courts E-Filing Portal The New Civil Cover Sheet 4 mins (1/1/2020)

# **Videos For The Self-Represented Litigant**

- Florida Courts E-Filing Portal Self-Represented Litigant Account Request 5 mins (5/8/2020)
- Florida Courts E-Filing Portal Self-Represented Litigant DIY Documents in the Portal 6 mins (1/20/2022)
- Florida Courts E-filing Portal Self-Represented Litigant Filing to a New Case 12 mins (5/8/2020)
- Florida Courts E-Filing Portal Self-Represented Litigant Filing to an Existing Case 7 mins (5/8/2020)

#### Suggested E-Filing How-To's

- Florida Bar Legal Fuel Podcast Florida Courts E-Filing Portal 42 mins (02/28/2021)
- Florida Courts E-Filing Portal Filing Large Documents 10 mins (10/10/2019)
- Florida Courts E-Filing Portal The Email Log 2 mins (10/10/2019)

- Florida Courts E-Filing Portal My Alerts 2 mins (10/10/2019)
- Florida Courts E-Filing Portal Forgot Password 1 min (10/10/2019)
- Florida Courts E-Filing Portal Setting Up Your Law Firm As An Organization 9 mins (1/1/2020)
- Florida Courts E-Filing Portal Request E-Filing Support 3 mins (5/12/2020)
- Florida Courts E-Filing Portal Portal Workbench 9 mins (3/27/2019)
- Florida Courts E-Filing Portal Submitting a Proposed Order– 4 mins (1/1/2020)
- <u>Certified Vendor Informational Video</u> -2 mins (10/20/2017)
- PDF/A Document Conversion -2 mins (2/11/2019)
- Manage My E-Service -3.5 mins (2/18/2019)
- File Documents to Multiple Cases 9 mins (4/10/2019)

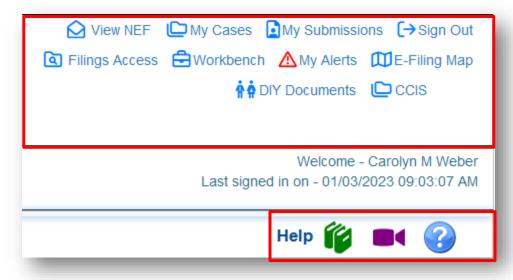
# **Clerk E-Filing Videos**

- County/Agency Clerk Filing a Notice of Appeal 8 mins (3/27/2019)
- County/Agency Clerk Submitting Record on Appeal 8 mins (3/27/2019)

#### **Videos For The Judicial User**

- Florida Courts E-Filing Portal The Judicial Filer 20 mins (6/17/2014)
- Florida Courts E-Filing Portal Setting Judicial Preferences 6 mins (6/20/2016)
- Florida Courts E-Filing Portal Judge Sign and File 4 mins (6/20/2016)

A YouTube training video, a link to the User Manual and a FAQ document are also on each page of the Portal. The training video and FAQ document apply only to the page it is on for a quick reference guide. The links are located on the right-hand side of the banner as shown below. Quick Links are also found on each page in the upper right-hand corner of the banner.



# **Training Manuals**

Also available on the Florida Courts E-Filing Portal webpage are training materials and manuals.

#### **Material**

- <u>E-Filing Portal Document Submission Standards</u> (Updated June 2017)
- FAQs on PDF/A (Updated April 2021)
- <u>E-Service User Guide</u> (Updated October 2017)
- Portal E-Commerce Update Filer Information (Updated November 2021)

#### **Manuals**

- <u>E-Filing Portal User Manual</u> (Updated June 2022)
   \* Includes information about filing as a Self-Represented Litigant
- State Agency Clerk Filer User Manual (Updated May 2022)
- Portal County Administrator User Manual (Updated May 2022)
- Circuit Administrator User Manual (Updated May 2022)
- Judge Filer User Manual May 2022 (Updated May 2022)
- Portal Organization Administrator User Manual (Updated May 2022)

# **E-Filing Standards Documents**

- AOSC 09-30 Electronic Filing Specifications
- Florida Supreme Court Technology Standards v. 1 (Adopted February 2021)

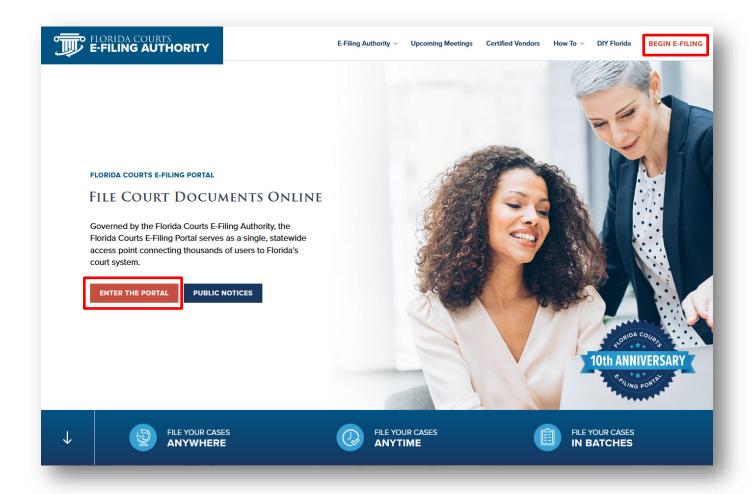
# **Certified Vendors**

If you are interested in using a value-added certified vendor to provide e-Filing capabilities from your CMS directly to the Portal, please go to the Certified Vendors tab on the main Portal web page. We have a list of vendors that are certified by the Florida Courts E-Filing Authority and a link to each of the vendors website so that you may contact them for more information.



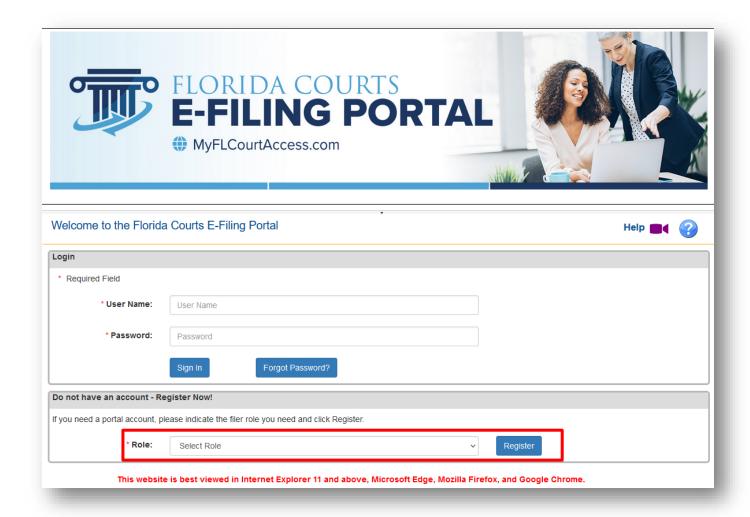
# **Account Registration**

Prior to utilizing the Florida Courts E-Filing Portal, filers must create an account. Filers can access the Portal's log-in page by typing the following URL into their web browser: <a href="www.myflcourtaccess.com">www.myflcourtaccess.com</a>. The website is best viewed in Microsoft Edge, Firefox, Brave and Google Chrome. Filers will be directed to the Florida Courts E-Filing Portal home page by selecting Begin E-Filing or Enter the Portal.

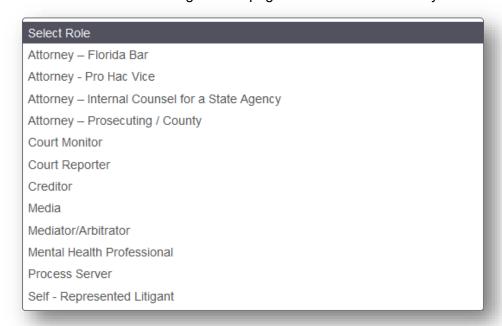


### Create an Account

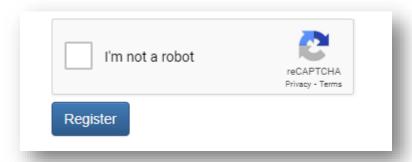
To gain access to the Portal, you must have a Portal Account. To get that account, please select the filer role you will be using and click on the **Register** button to complete the Account Registration Form, check the reCAPTCHA message box and then click the **Register** button.



Filers will be directed to the Account Registration page based on the filer role you select.

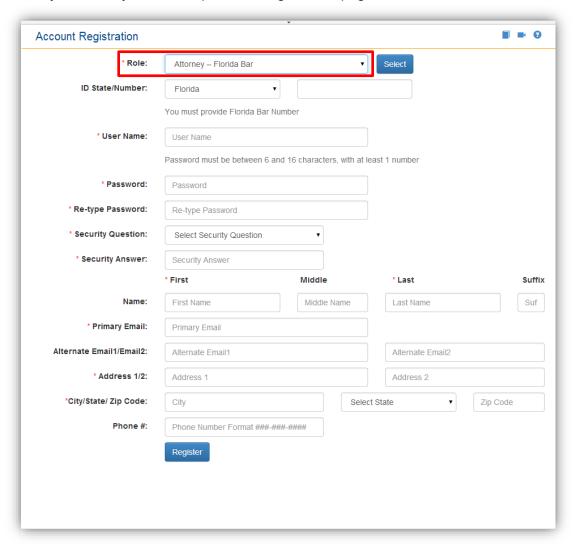


At the bottom of the form, you will see the reCAPTCHA message box that you must go through to finish registering.



#### **All Attorney Filer Roles**

For the Attorney filer role, you will complete this registration page:



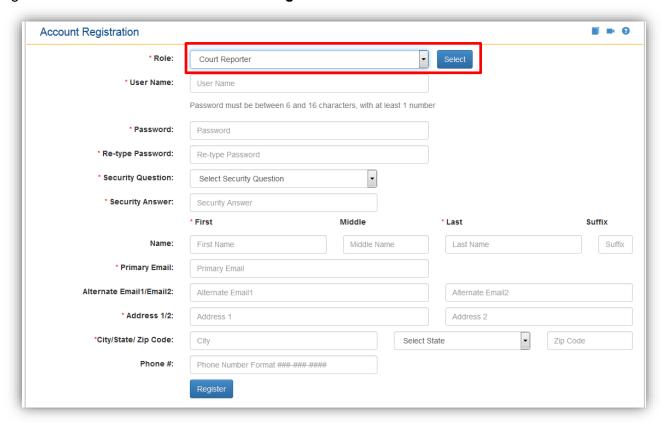
Filers will be prompted to complete all required fields on the page. Required fields are indicated with a red asterisk.

- 1. A Florida Bar Number is required.
- 2. Filers are required to enter a username and password and confirm their password selection by retyping it. The requirements for creating a valid password are the password must be between six and 16 characters with at least one number which also appear above the password field.
- 3. Filers are required to select a security question from the drop-down menu and provide an answer to the question.
- 4. Filers are required, at a minimum, to enter their first and last name along with a primary email address. To receive a quick automated approval, be sure that the name you register matches the name that you have listed with The Florida Bar. If the name does not match, manual approval will be necessary and a delay in registering may occur. All notifications to the filer are sent via email to the address provided in the Account Registration page. The Portal allows for three email addresses to be entered. Notifications sent to the filer will be sent to each email address listed.

Click on **Register** once all information is entered.

#### **Court Reporter Filer Role**

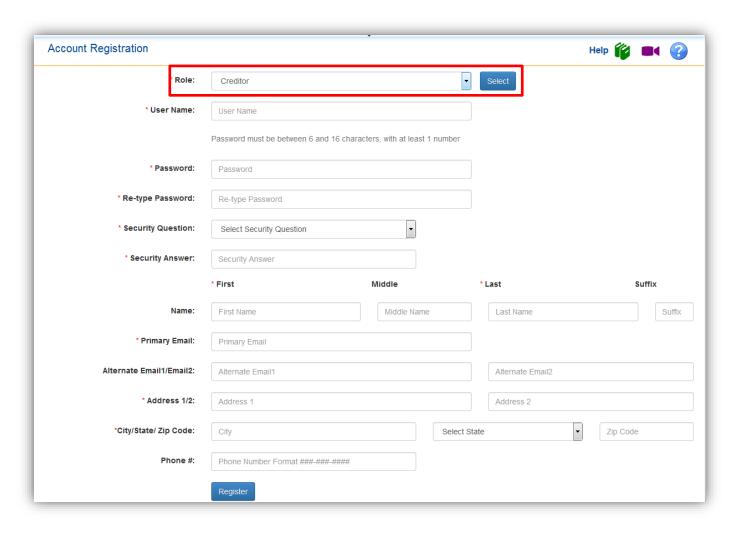
For the Court Reporter filer role, you will complete the following registration page. Complete the registration information form and click on **Register**.



When filing as a court reporter, you will have access to file specific documents to a case. You will not have access to the official court file on the My Submissions page and you will not have access to the My Cases page nor will anyone who files using a court reporter role be added to the E-service list.

#### **Creditor Filer Role**

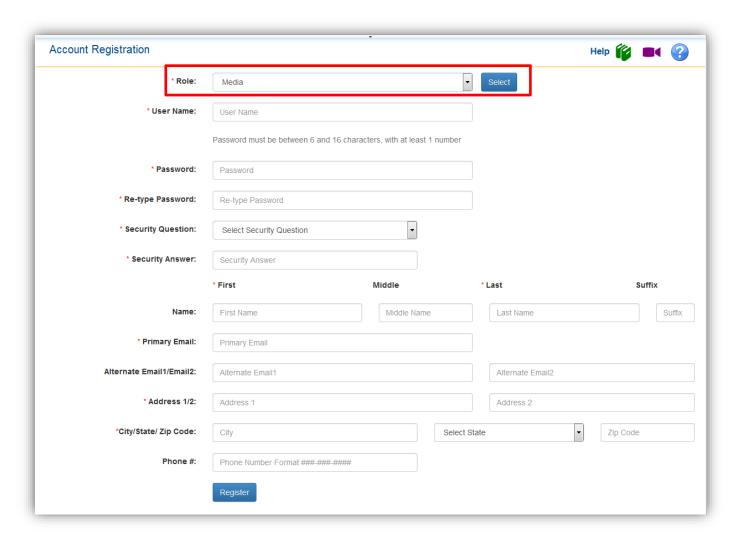
For the Creditor filer role, you will complete the following registration page. Complete the registration information form and click on **Register**.



When filing as a creditor, you will have access to file specific documents to a case. You will not have access to the official court file on the My Submissions page and you will not have access to the My Cases page nor will anyone filing as a creditor be added to the E-service list.

#### **Media Filer Role**

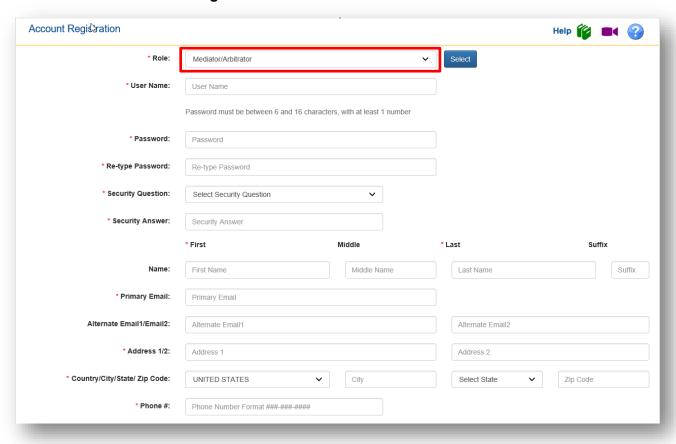
For the media filer role, you will complete the following registration page. Complete the registration information form and click on **Register**.



When filing using a media filer role, you will have access to file specific documents to a case. You will not have access to the official court file on the My Submissions page and you will not have access to the My Cases page nor will anyone filing using the media filer role be added to the E-service list.

#### **Mediator/Arbitrator Filer Role**

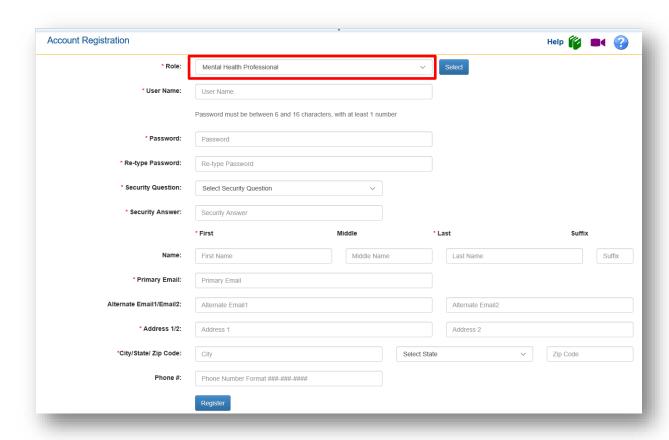
For the Mediator filer role, you will complete the following registration page. Complete the registration information form and click on **Register**.



When filing as a mediator, you will have access to file specific documents to a case. You will not have access to the official court file on the My Submissions and the My Cases page and you will not be added to the E-service list.

#### **Mental Health Professional Filer Role**

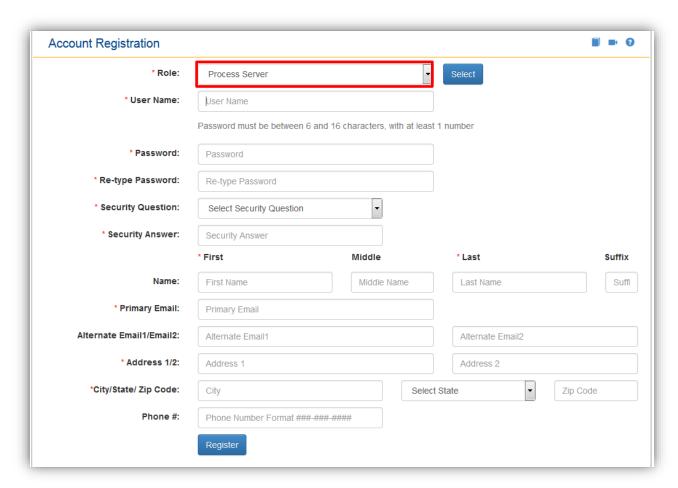
For the Mental Health Professional filer role, you will complete the following registration page. Complete the registration information form and click on **Register**.



When filing as a mental health professional, you will have access to file specific documents to a case. You will not have access to the official court file on the My Submissions page and you will not have access to the My Cases page nor be added to the E-service list.

#### **Process Server Filer Role**

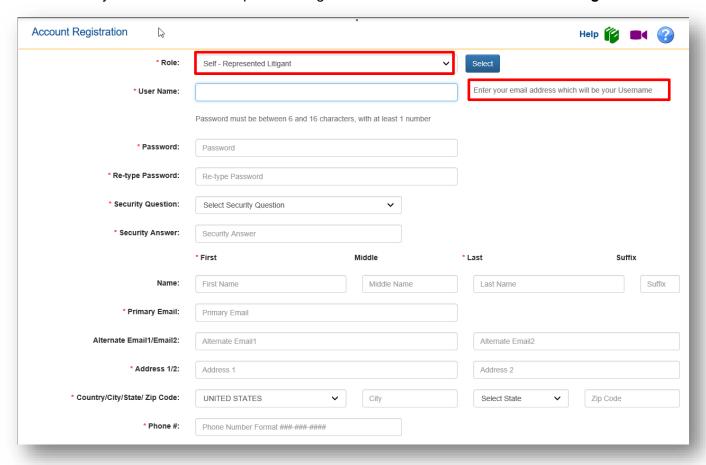
For the process server filer role, you will complete the following registration page. Complete the registration information form and click on **Register**.

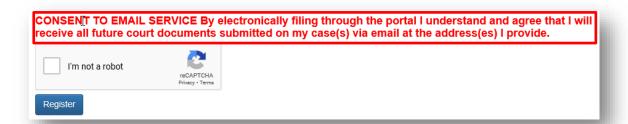


When filing as a process server, you will have access to file specific documents to a case. You will not have access to the official court file on the My Submissions page and you will not have access to the My Cases page nor be added to the E-service list.

#### **Self-Represented Litigant Filer Role**

For the self-represented litigant filer role, you will complete the following registration page. Your email address will be your username. Complete the registration information form and click on **Register**.

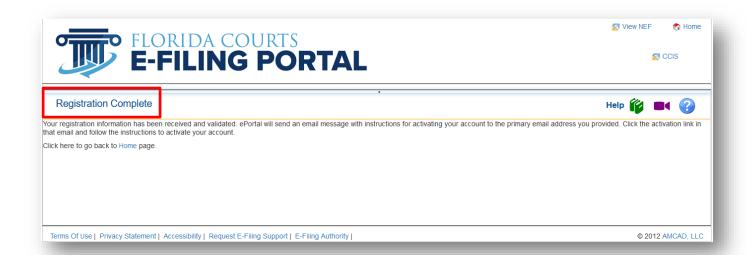




Please enter your email address in the Username field. Your email address will be your Username.

Please Note: By electronically filing through the Portal, you are agreeing to receive service of all future court documents submitted on your case(s) by email at the address(es) provided in your Account Registration form.

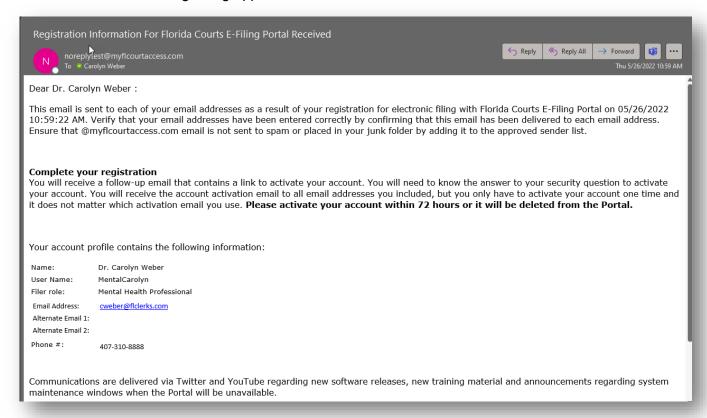
Upon successful registration filers will be taken to the **Registration Complete** page.



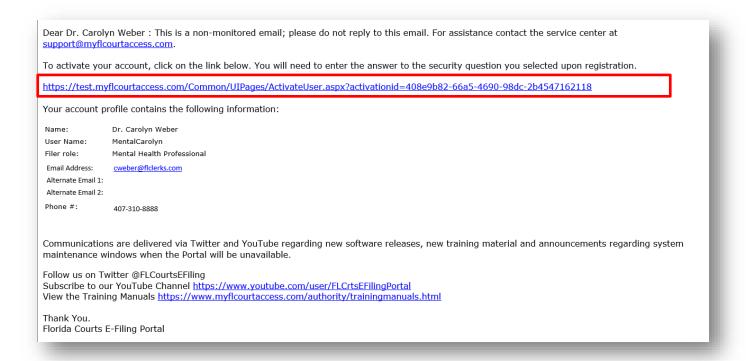
## **Email Notifications:**

Filers will receive two (2) separate email notifications.

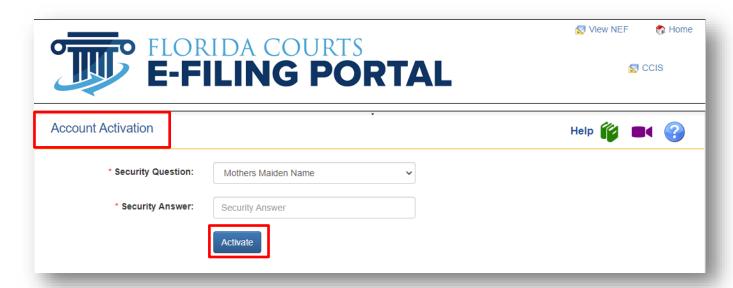
 The first email notification provides the filer with confirmation that the registration process was successful and provides the filer with profile information entered during the registration process. If the registration requires review by Portal support before approval, the e-mail notification will indicate that the registration is pending approval. Once approved by Portal support the filer will receive the emails regarding approval and activation.



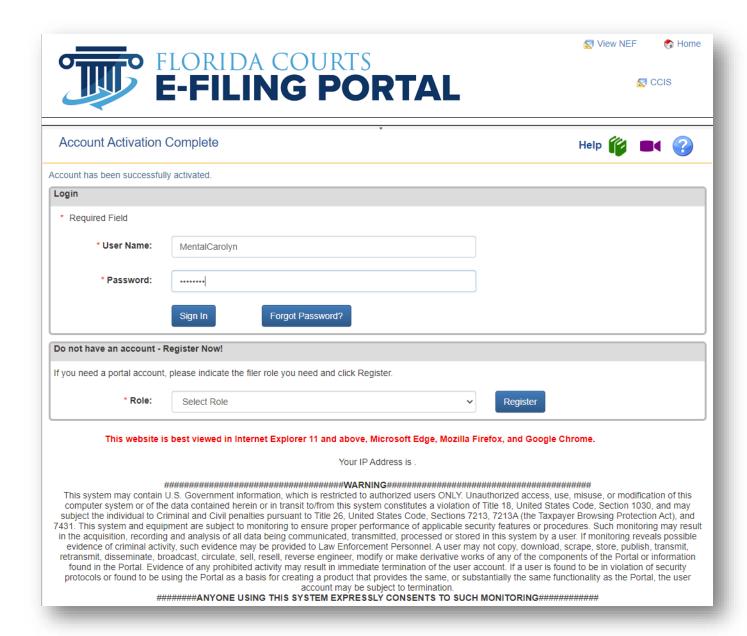
2. The second email notification provides the filer with an activation link which the filer must click on to complete the registration process.



Clicking the link provided in the email takes the filer to the **Account Activation** page. Filers must verify their identity by answering the security question shown in the drop-down menu that they selected during the registration process. Then click **Activate** to complete this step. **Accounts in the Pending Activation status for longer than 72 hours will be deleted.** 

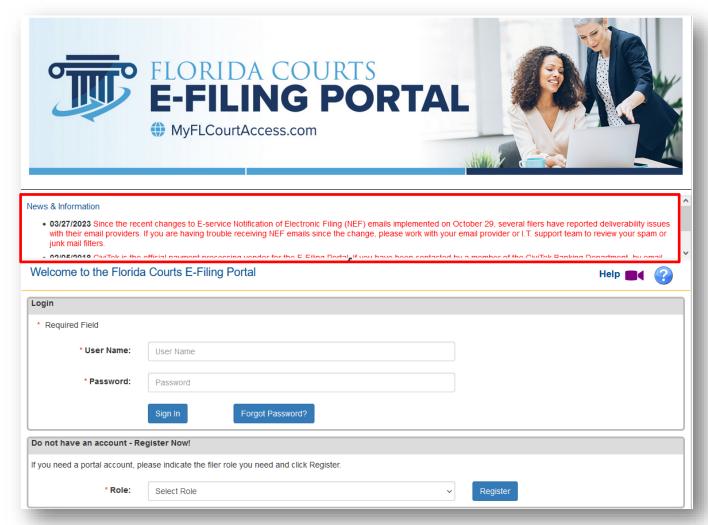


The filer is then notified in their email provider that their account activation is complete, and their account has been successfully activated and they are taken to the log on screen for the Portal where they will type in their username and password. Then click on **Sign In** to enter the Portal.

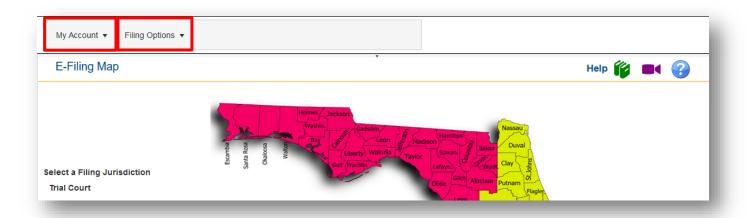


# **Portal Navigation**

Once the account is activated, users can return to the Portal home / log in page at <a href="www.myflcourtaccess.com">www.myflcourtaccess.com</a>. Filers will enter their **Username** and **Password** and click **Sign In** to enter the Portal. **Documents filed through the Portal are required to be in PDF/A format.** The Portal will accept a Word document as well for now, but the required format is **PDF/A**. WordPerfect documents will not be accepted by the Portal.



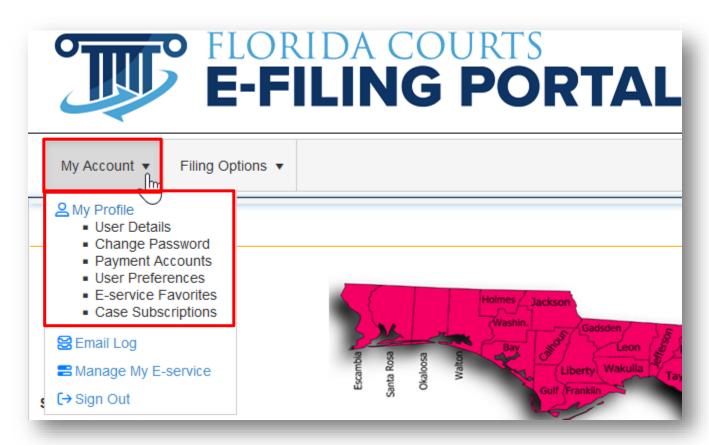
Once the filer is logged in, they are immediately taken to the Home Page selected by you the filer. The home page also has a menu bar that has two menu tabs: (1) the **My Account** menu and (2) the **Filing Options** menu located on the upper left side of the page. The functionality associated with these two menus allows filers to make changes to their profile / account and move to other pages within the Portal.



# **My Account Menu**

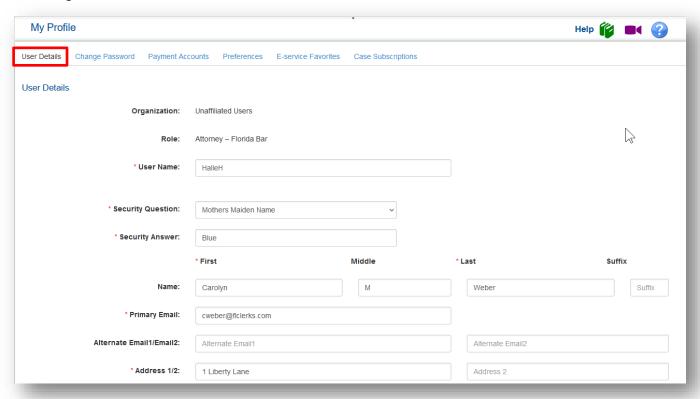
# My Profile

Choosing **My Profile**, from the drop down provides filers with the ability to manage their account information using **User Details**, **Change Password**, **Payment Accounts**, **User Preferences** and **Eservice Favorites**. If you are the Administrator of an organization (such as your law firm) you will see additional options. Edit Organization, Manage Users, Unaffiliated Users all fall to the Organization Administrator and are explained in the Portal Organization Administrator User Manual.



#### **User Details**

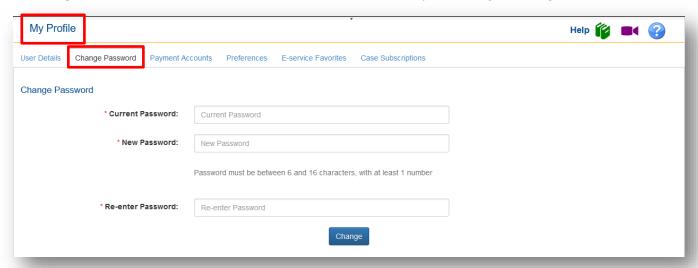
The User Details option provides filers with the ability to update their profile information. Filers can update any of their profile information present except for **Organization** (if you are a part of an organization) and **Role**. When finished updating click on **Update** button at the bottom of the page to save changes.



The Portal allows the filer to enter up to three [3] email addresses. Electronic Notifications are sent to all email addresses on the account.

## **Change Password**

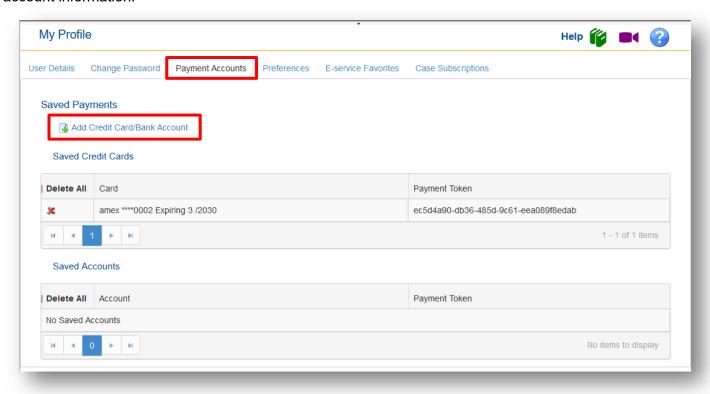
The **Change Password** menu option provides filers with the ability to manage / change their password.



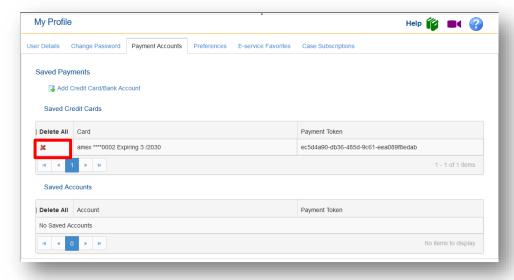
New passwords must meet the criteria for passwords stated on the page under the New Password input box which is 'Password must be between 6 and 16 characters, with at least 1 number.'

#### **Payment Accounts**

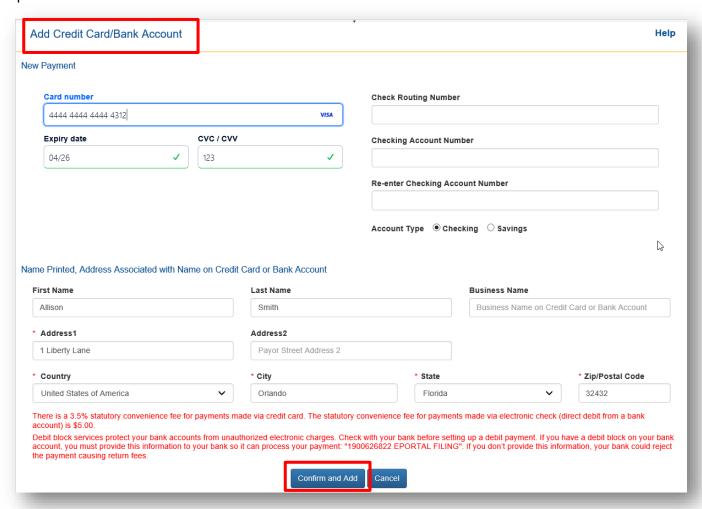
The **Payment Accounts** tab allows the filer to add and delete saved payment credit card and/or ACH account information.



You may remove all accounts by selecting **Delete All** or you may remove them individually by selecting the **red x** next to the Credit Card or ACH Account you wish to delete.

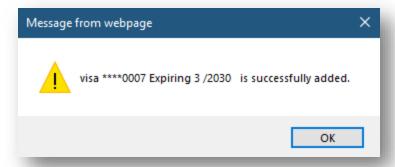


To add additional payment accounts, click on **Add Credit Card/Bank Account** and complete the required information.



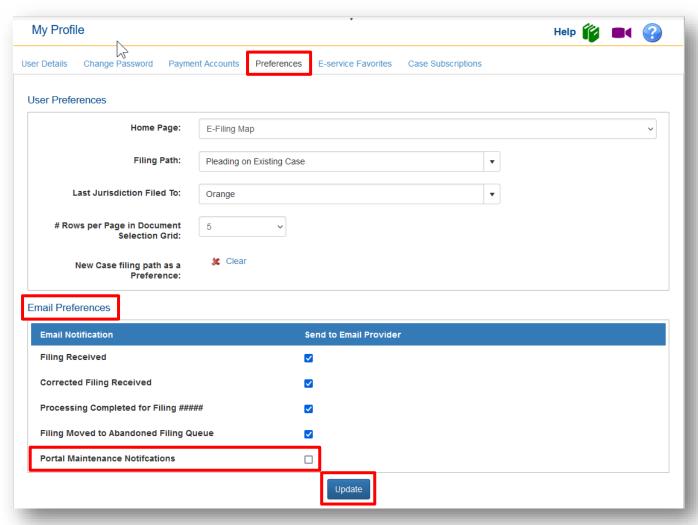
**Please note:** The Payment Zip is the billing address zip code. To be sure you receive authorization for the credit card, make sure the zip code entered matches the zip code for the billing address on the credit card account.

You will receive confirmation when the new credit card or ACH account is added to your profile.



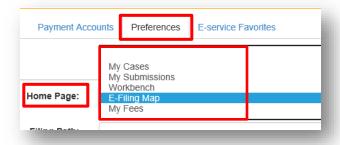
#### **Preferences**

The **Preferences** tab allows you the filer to select the home page of your choice, the filing path and the jurisdiction that will appear when you log into the Portal unless you have an alert pending. If you have an alert that is unresolved, the Portal will automatically take you to your **My Alerts** page when you log into the Portal regardless of the home page you have designated until you rectify or clear the pending alert. Once the alert has been cleared, you will then land on your designated home page when you log into the Portal. Simply make your selections by invoking the drop-down and selecting your preferences. You are also able to select the email notifications you wish to receive from the Portal. By default, all email notifications will be selected.



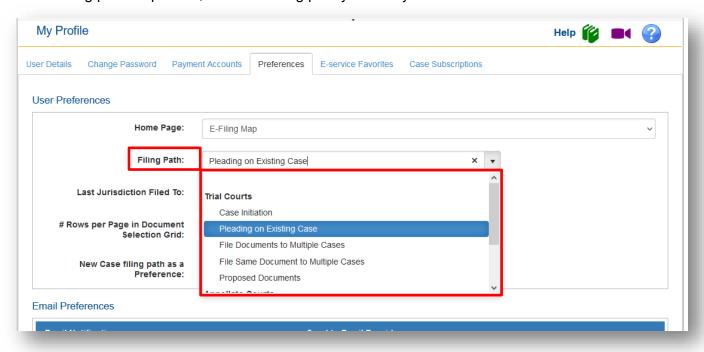
#### Home Page

Select the page you desire to be used as your home page when you log into the Portal.



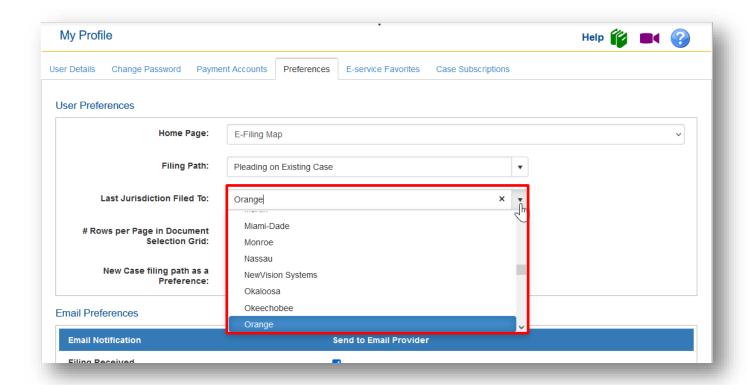
## Filing Path

From the filing path drop-down, select the filing path you wish your Portal to default to.



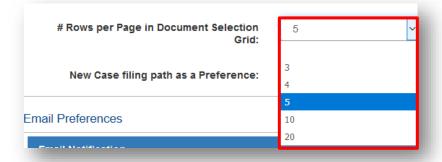
#### Last Jurisdiction Filed To

From the drop-down, select the Jurisdiction you wish to default to in the Portal. By default, the jurisdiction will show the last jurisdiction you filed to.



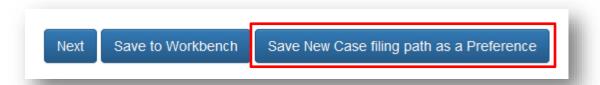
#### Rows per Page in Document Selection Grid

To limit the number of rows of document descriptions you see in the Add/Edit Document dialog box, select from the drop-down. You will still be able to search the entire list or scroll through the list by using the tabs at the bottom of the box.

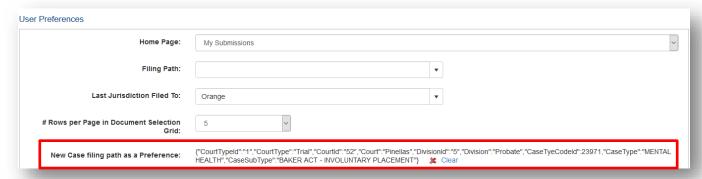


#### New Case Filing Path as a Preference

To designate a case initiation filing path to include the division, case type and case sub type as your home page in the Portal, create a new case and on the **Case Information** page at the bottom select the option to **Save New Case filing path as a Preference**.



This will save the county, division, case type and sub type as your default case initiation case information page.

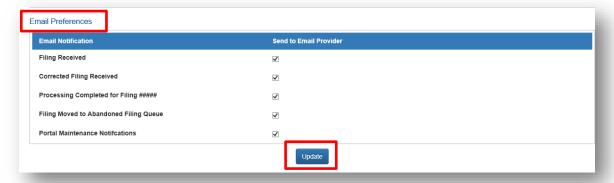


To clear this information and set another case type as your default, click on Clear in the user **Preferences**. To set up another new case preference, you will have to go through the Case Information page on the case initiation filing path. Then select the **Save New Case filing path as a Preference** option.

**NOTE:** If you have both a home page and a new case filing path as a Preference option selected, the New Case filing path option will take precedence and you will be directed to the Case Initiation, Case Information page upon login.

#### **Email Preferences**

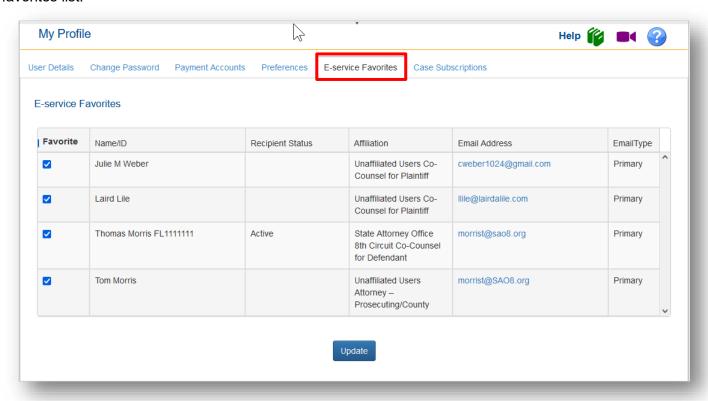
If you do not wish to receive one or all the email notifications specified below, remove the check mark in the box under the heading 'Send to Email Provider' and click on **Update** and from that day on you will not receive those de-selected email notifications in your email provider.



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

As you create E-service lists in the Portal, you are also able to create your E-service favorites list. When you add Other Attorney/Interested Party to an E-service list during the filing process, you will be able to add them to your E-service favorites list so that the next time you need to add that person to an

E-service list you can use the E-service favorites link and quickly select them from your list of E-service favorites list.

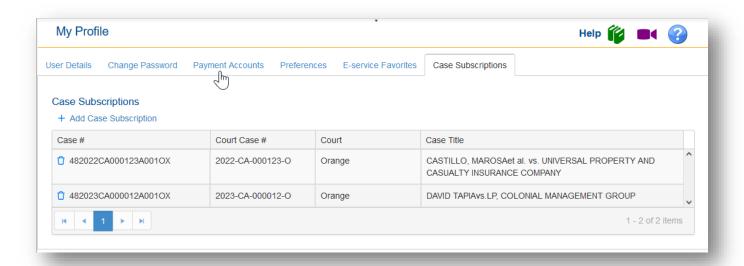


To remove a person from the E-service favorites list, remove the check in the Favorite column and click on **Update**. That will remove that person from your E-service favorites list when it is displayed when you are adding to your E-service list. **Please note** that they will not be removed from your E-service favorites list permanently in case you need to select them later. To do so simply place a check in the box under the **Favorite** column and that name will again appear on your E-service favorites list when you are selecting people to be added to the E-service list.

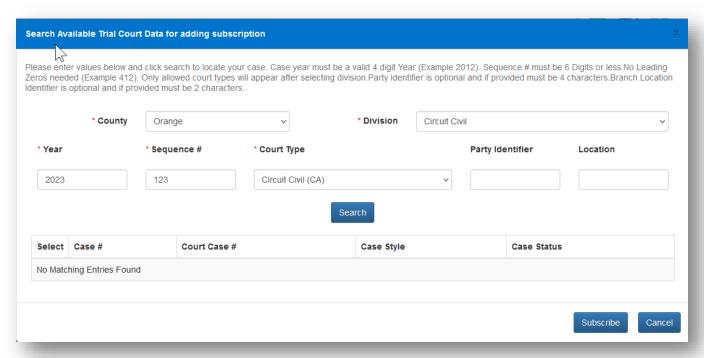
To add a person to your E-service Favorites list, make sure you select 'Add to E-service Favorites' when you add that person to an E-service list using Other Attorney/Interested Party link.

#### **Case Subscriptions**

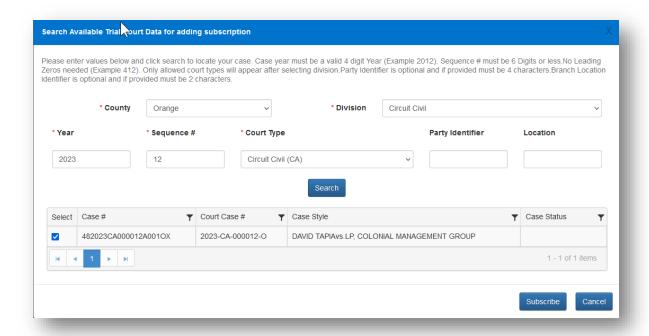
Filers now have the ability to be notified of case activity in circuit and county civil cases. When activity occurs in any case you have listed, you will receive an email notification. To add cases to your list, click on the +Add Case Subscription link.



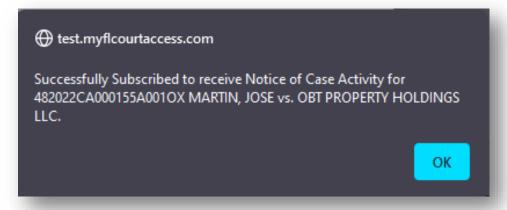
Fill in the information on the "Search Available Trial Court Data for adding subscription" message box and then click on **Search**.



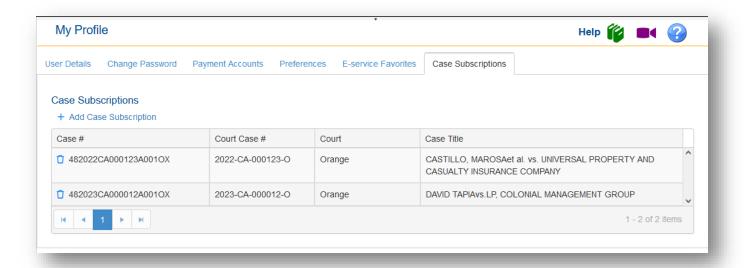
The Portal will pull back the case information to allow you to select the case and then click on **Subscribe**.



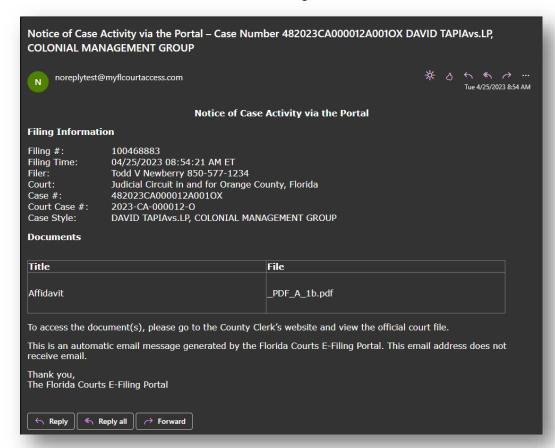
You will receive confirmation that you have successfully subscribed to receive Notice of Case Activity for the specified case.



Click **OK** and your selected case will be added to your Case Subscriptions page.

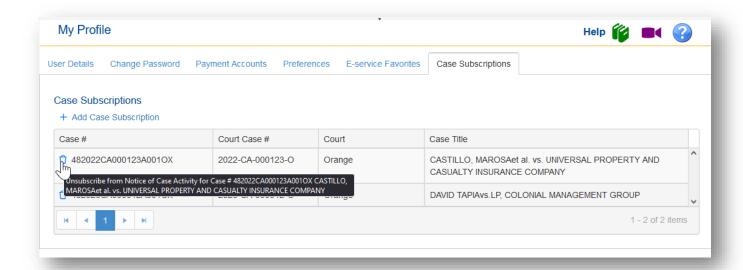


Whenever there is activity in any case on your My Subscriptions list, you will receive an email like the one shown below. The subject line will be "Notice of Case Activity via the Portal – Case Number 482023CA000012A001OX David A. Johnson vs. Walgreens



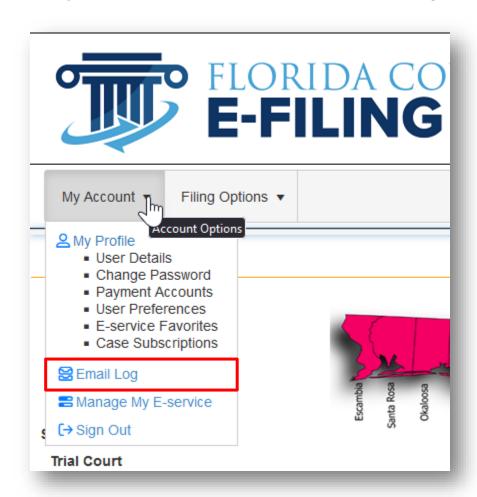
To view the documents filed, you will have to go to the County Clerk's web site.

To remove a case from the Case Subscriptions list, click on the garbage can icon to the left of the Case #

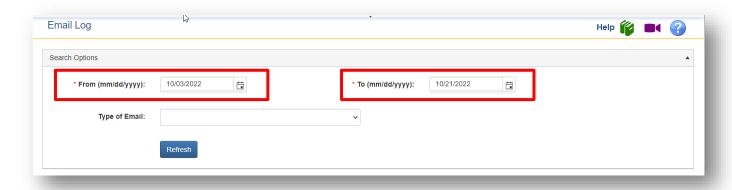


# **Email Log**

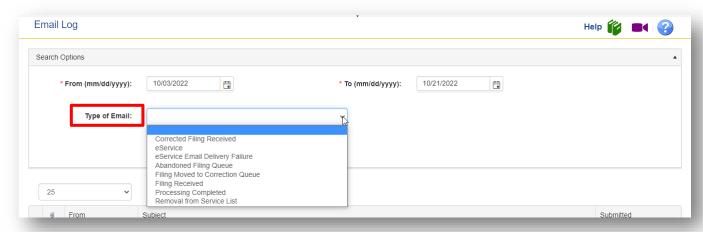
Any email that you receive via your email provider will also be logged in the **Email Log**. To access the **Email Log**, go to the **My Account** tab and from the drop down select **Email Log**.



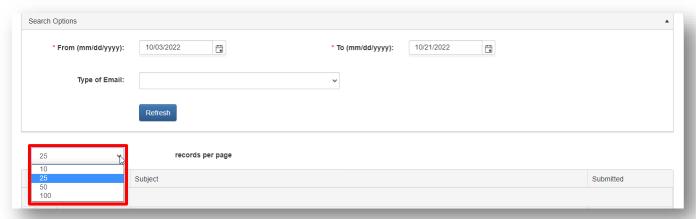
The **Email Log** will default to the last seven days however you can adjust the dates to reflect a larger period if you are searching for a specific email. Either type in the "From" and "To" dates or use the calendar fly out to select a date. Then select **Refresh**.



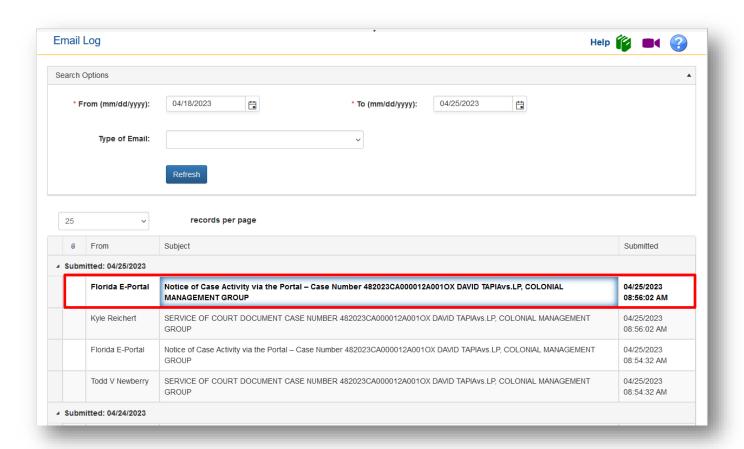
You can also search for the type of email by selecting your search criteria from the drop-down.



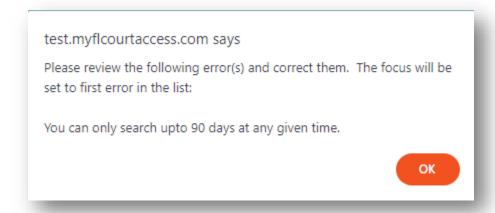
Set the number of records to show per page by selecting the number from the drop down and then click on **Refresh**.



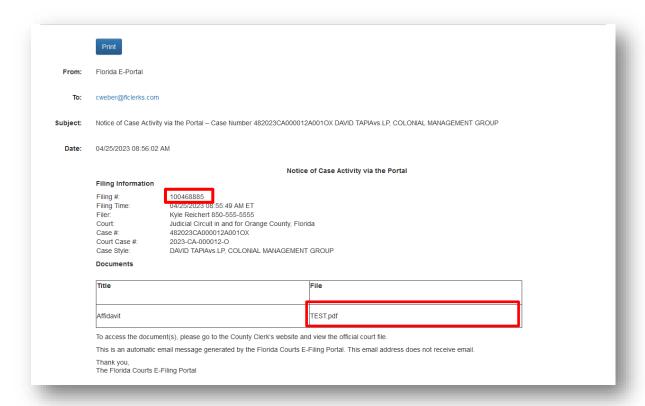
To view the results of your search, scroll down the page. To view the contents of the email, click on the email you wish to view.



Scroll down the page and you will see the body of the email that you also received in your email provider [i.e., yahoo, Gmail, outlook, etc.]. **NOTE**: **The link to the document will be available in the Service of Court Document email or the Notification of Electronic Filing (NEF) in the Email Log for 18 days**. You may only search up to 90 days at any given time.



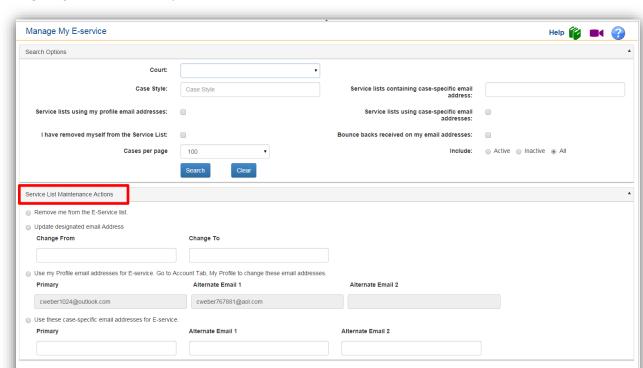
The Notice of Electronic Filing (NEF) as provided in your email provider is shown below. The name of the document listed in the File column is the link to the document submitted. The Filing # link will give you the option to download all document in the submission as a zip file if you filed the document. If you were not the filer, there will be no link available to the document.



# Manage My E-service

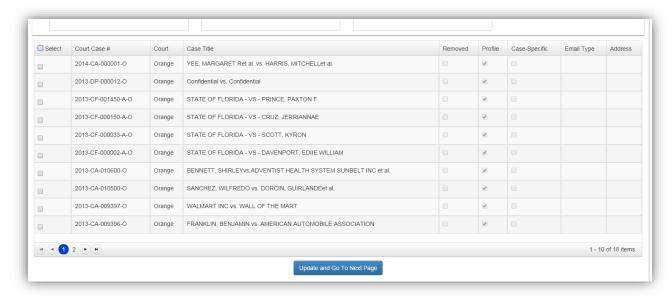
The last option on the My Account menu is Manage My E-service.



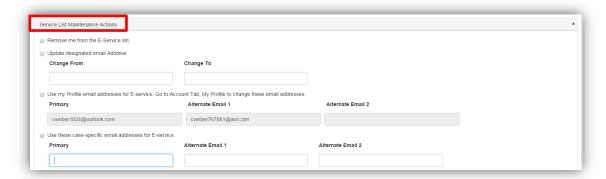


Manage My E-service lets you perform maintenance actions on multiple cases at the same time.

You may select any of the Search Options to narrow your result set. You may limit your search to a specific county, service lists using your profile email addresses for E-service, using case specific email addresses for E-service, etc. Once you have defined your search criteria, click on **Search** to view your result set.



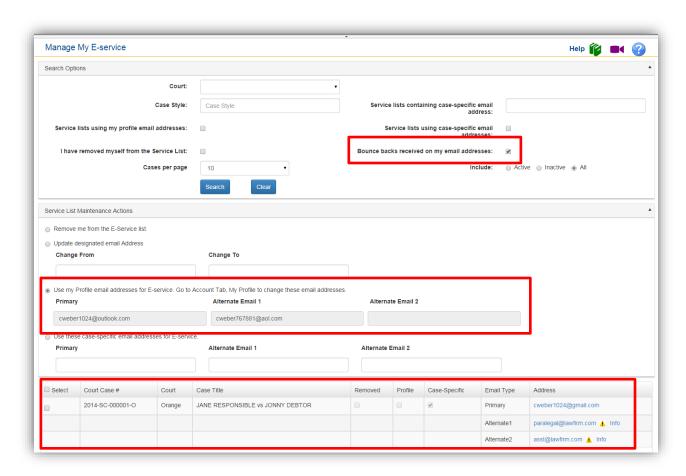
Once you have your E-service case list, select a Maintenance Action to perform.



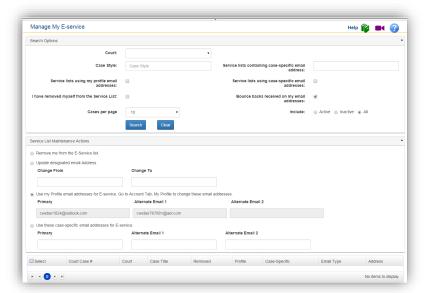
- You may remove yourself from an E-service List.
- Update designated email addresses
- User your profile email addresses for E-service
- Use case specific email addresses for E-service

Select the **Maintenance Action** you wish to perform and then from the list of cases at the bottom of the page, select the cases you wish to have the maintenance action performed.

In the example shown below, I searched for all my cases that have received bounce backs on my email addresses. Then for the maintenance action I selected Use my Profile email addresses for E-service. Then in the list of my cases I selected the case[s] I wish to have this maintenance action performed on.



Once I click on **Update**, the maintenance action is performed and when I perform my search again using the same criteria as above, the list is now empty.

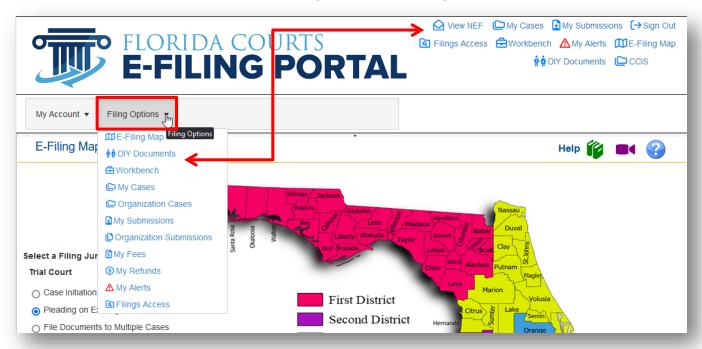


The case that was on the list before has now had the E-service list changed to use **My Profile** email addresses for E-service.

This feature was added to allow the filer to perform maintenance actions to multiple cases at the same time.

# Filing Options/Quick Links

The Portal Filing Management Links are located under the **Filing Options** menu. In addition, for ease of use these links are also located in the upper right corner of the page in the **Quick Links**.



Each Quick Link option link is discussed below.

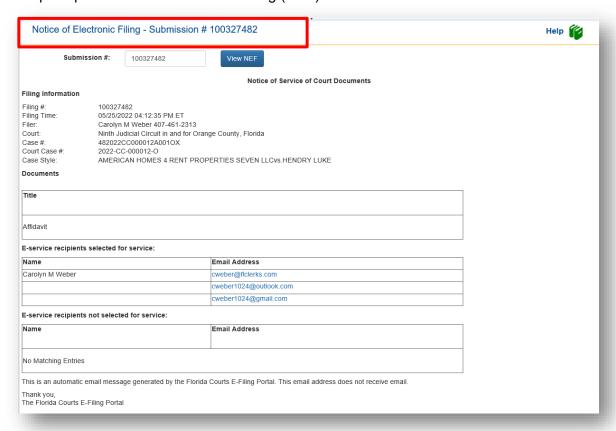
### **Quick Links**

### **View NEF (Notice of Electronic Filing)**

Click on the **View NEF** link in the **Quick Links** to view the Notification of Electronic Filing (NEF) that provides E-service of the document(s) submitted. You enter in the Submission ID and click on **View NEF**.

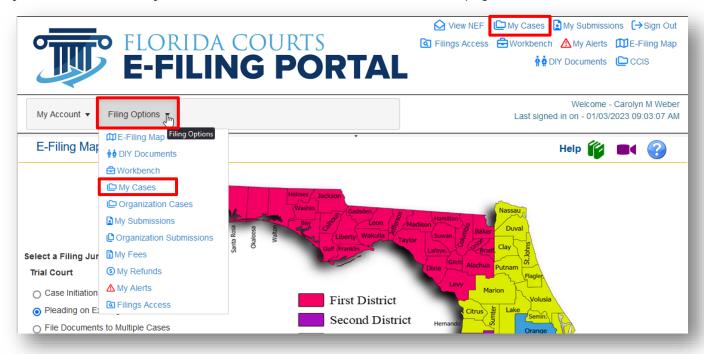


This will pull up the Notice of Electronic Filing (NEF) for that Submission #.

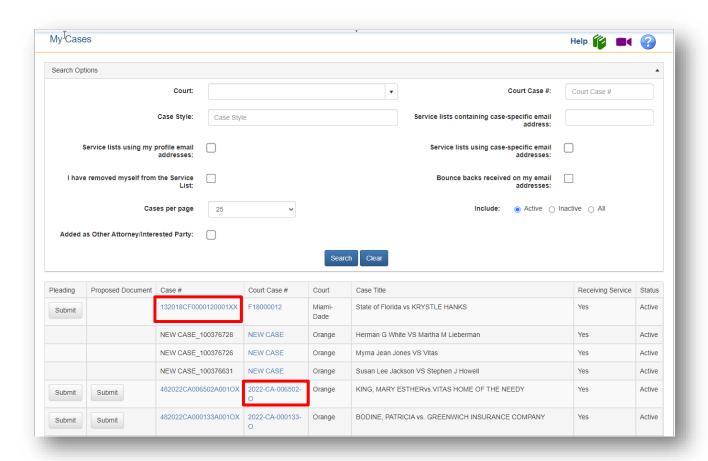


#### My Cases

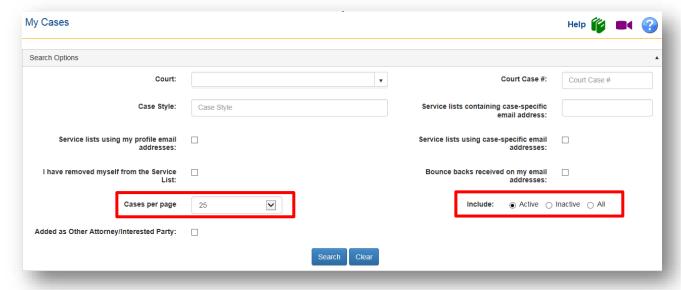
To go to the **My Cases** page, select **Filing Options** from the menu bar and then highlight and select **My Cases** or use the **My Cases** menu in the Quick Links section of the page.



This will take you to your **My Cases** page where you have access to the court file and the documents therein by selecting the hyperlinked case number in the **Case #** column and the E-service list by selecting the hyperlinked case number in the **Court Case #** column. You can update the E-service list from this page. You do not have to file a document to access the E-service page.



You will also see the Case #, Court Case #, Court submitted to, Case Title, whether you are receiving E-service in the case and the status of the case. This page is customizable in that you may select specific search items that will control the number of records to show per page as well as whether to display "active," "inactive," or "all" cases that you have filed electronically to. Once you set these preferences, they will be retained until you change them.

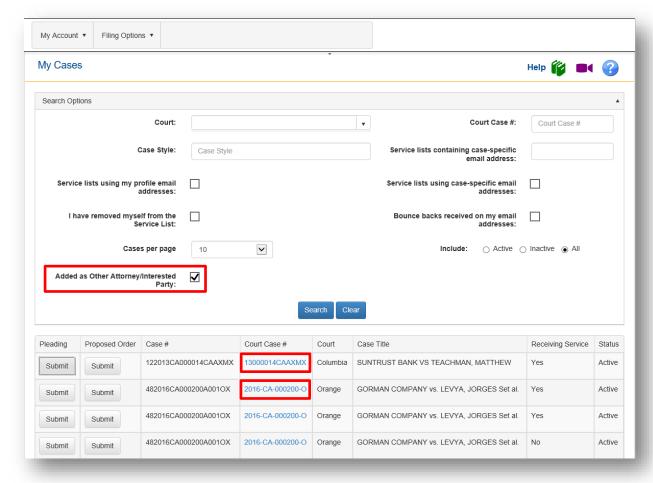


You may use the **Search Options** available to limit your **My Case** page display. These **Search Options** are:

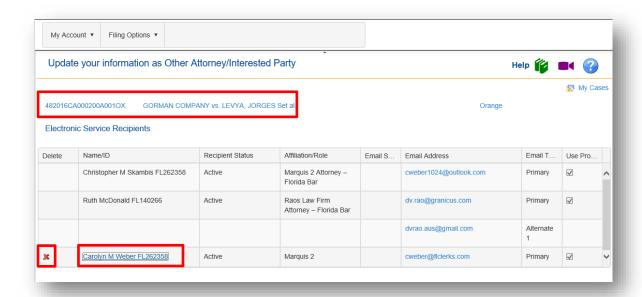
- Court
- Court Case #
- Case Style
- Service lists containing case-specific email address
- Service lists using my profile email addresses
- Service lists using case-specific email addresses
- I have removed myself from the Service List
- · Bounce backs received on my email addresses
- Added as Other Attorney/Interested Party

### Remove from E-service List when Added as Other Attorney/Interested Party

If you do a search using **Added as Other Attorney/Interested Party** as your search criteria, you will get a list of all the cases in which you have been added as an Other Attorney/Interested Party by someone else.



You will then be able to update your email if you wish to use another email address or you may remove/delete yourself from the E-service list for this case. To access the E-service list for a case click on the Court Case # link shown above.

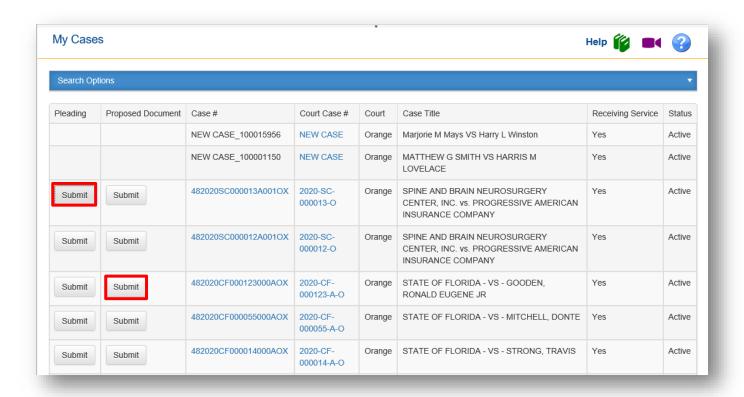


If you wish to change the email addresses listed for you by the filer that added you to the E-service list, click on your name in the Name/ID column and make any corrections necessary. If you wish to remove yourself from the E-service list, click on the red X next to your name. Once you make your corrections, click on **Save** at the bottom of the page to save your corrections.

### Submit Pleading from My Cases

Also available from the **My Cases** page is the "**Submit**" button. Once you have electronically filed to a case, it is automatically added to your **My Cases** page. From then on, you have the option to file directly to that case from the **My Cases** page by selecting the **Submit** button. That will eliminate the need to select the county, division, enter the sequence number on the Case Information page and click on **Search** to pull up your case. The Portal will retrieve the case information based on the case you select and take you to the bottom of the Case Information page where you can enter a Matter # or mark your filing as an **Emergency** and finish the submission.

When a county is ready to accept Proposed Orders/Documents electronically through the Portal, you will also see a **Submit** button in the Proposed Document column. Until that time, there will be no way to submit a Proposed Order/Document through the Portal to that county.

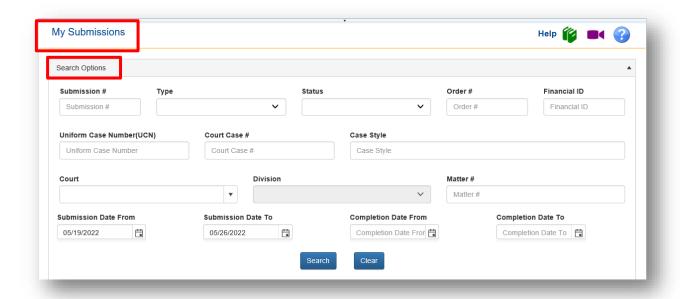


### My Submissions

The **My Submissions** page shows all submissions you have made over the past seven days. You may adjust the number of days displayed by selecting the timeframe using the calendar fly-out feature. It will also show you the following information.

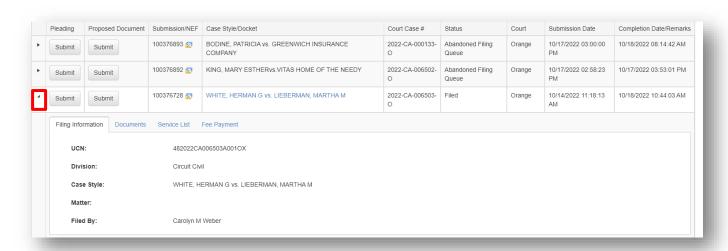
- **Pleading:** You may submit another pleading to the case using the **Submit** button under the Pleading column.
- **Proposed Document**: You may submit a proposed order or other documents as determined by the circuit to this case using the **Submit** button under the Proposed Document column.
- Submission/NEF: The Portal assigned reference number for your filing and the Notification of Electronic Filing [NEF] that is sent out to provide E-service of the documents you filed in that submission.
- Case Style/Docket: The abbreviated style of the case which is the first named plaintiff versus the first named defendant.
- Court 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, Pending Filing, Filed, Correction Queue, or Abandoned Queue.
- Court: The name of the jurisdiction the case is filed in.
- **Submission Date**: Date the filer submitted the filing on the Portal which is the official file stamp date and time.
- **Completion Date/Remarks**: Date the filing was processed by the Clerk's office or remarks from the Clerk/Reviewer as to why the filing was moved to the Pending Queue.

You may search your **My Submissions** page using any of the following search criteria:



- Submission #
- Type
- Status
- Order #
- Financial ID
- Uniform Case Number UCN
- Court Case #
- Case Style
- Court
- Division
- Matter #
- Submission Date From
- Submission Date To
- Completion Date From
- Completion Date To

**Note:** To see more information about a submission, select the > next to the Filing #.

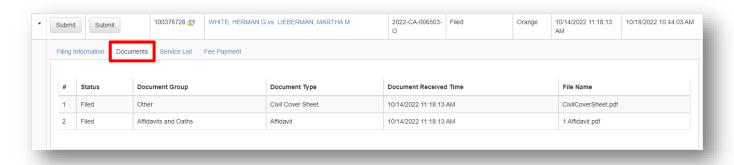


There are four tabs that appear: Filing Information, Documents, Service List and Fee Payment.

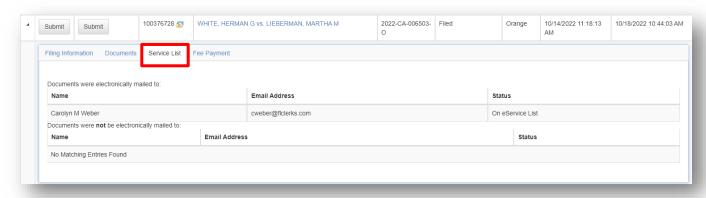
The **Filing Information** displays the following information.



The **Documents** tab shows you the documents submitted.

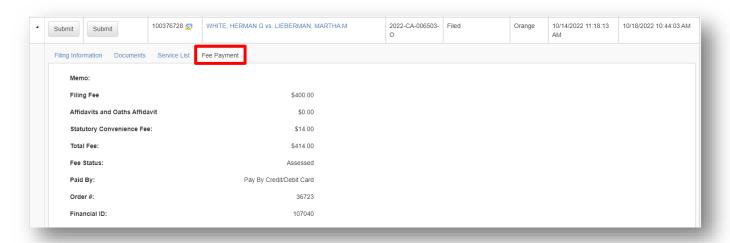


The **Service List** displays those selected for E-service and those de-selected for E-service on this submission.



The **Fee Payment** tab shows you the status of the fee and a breakdown as to how the fee was calculated, the payment method used, the Order #, and the Financial ID.

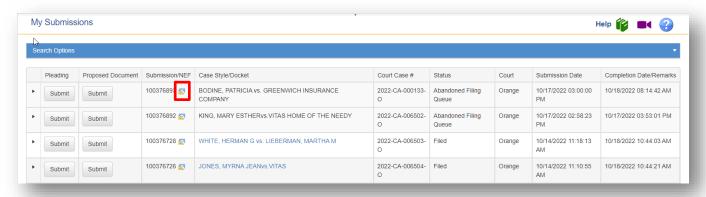
You, as the filer, are responsible for all fee payments. If there are any issues with payment processing, you will be contacted by the CiviTek Banking Department. If you have outstanding balances due and no payment is received, you will not be allowed to use an ACH account for payment of fees. You will have to use a credit card until the bad debt is resolved.



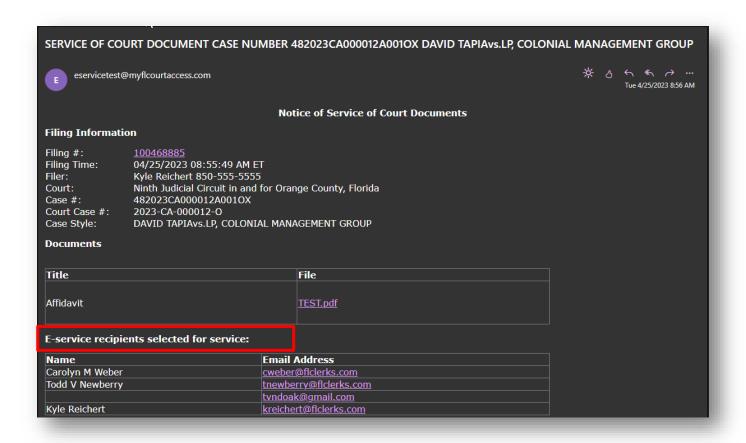
CiviTek is the official payment processing vendor for the E-Filing Portal. If you have been contacted by a member of the CiviTek Banking Department, by email, letter, or phone call; these are legitimate communications concerning your E-Filing banking information. Please respond to their communications accordingly.

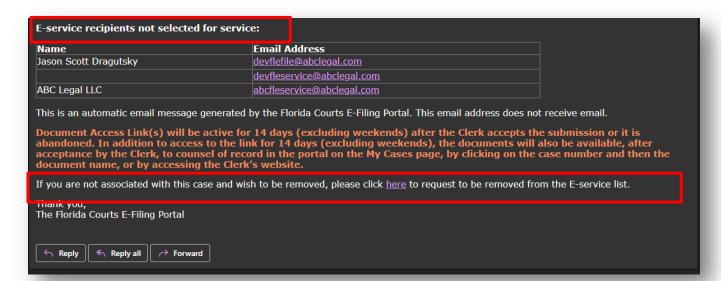
### Notification of Electronic Filing

Upon submission of documents, a **Notification of Electronic Filing [NEF]** will be sent to the selected E-service recipients on the E-service list. Within the NEF, there will be a link to the documents filed in that submission. To view the NEF, file envelope which is next to the Submission number and shown below.



The NEF will open that will show you the E-service email as well as who was electronically notified and who was not electronically notified.



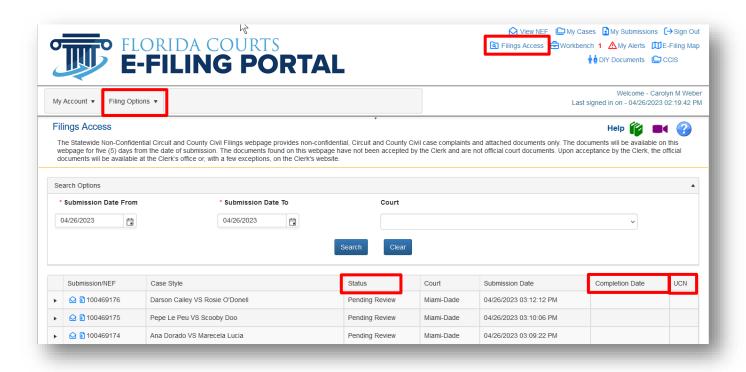


The contents of the NEF are also found in your **Email Log**. The link to the document(s) filed is also available in the Email Log. The **My Submissions** list defaults to filings within the last seven days. The filer may expand or narrow the list by using the **From** and **To** dates. This date range 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.

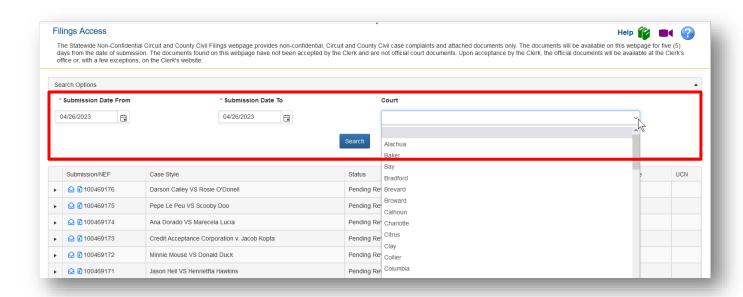
Organization Cases and Organization Submissions are only visible if you are an organization administrator. For more information on creating an organization, please see the Portal Organization Administrator User Manual found on <a href="https://www.myflcourtaccess.com">www.myflcourtaccess.com</a> under How To, Training Material and User Manuals.

### **Filings Access**

The Filings Access page is available to everyone who has a Portal account. This page is available from the Quick Links as shown below and from the Filing Options drop-down. This page will give you access to statewide, non-confidential, Circuit and County Civil, case initiation submissions and the documents therein before they have been accepted by the Clerk. These are not official court documents and will contain an Unofficial Court Document watermark. The submissions will be in reverse chronological order. The documents will be available for five (5) calendar days from the date of submission. Upon acceptance by the Clerk the official court document will be available in the Portal on your My Cases page, the Clerk's website or at the Clerk's office. As the submissions are reviewed and accepted by the Clerk, the status will update, the Completion Date will be available as will the UCN (Uniform Case Number).



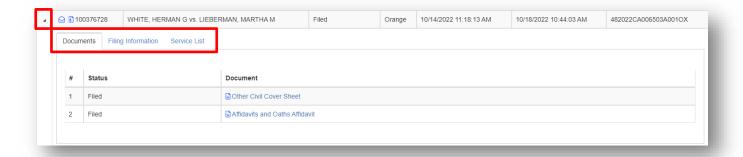
You will be able to search using the following **Search Options**. Submission Date From, Submission Date To and Court (county submitted to).



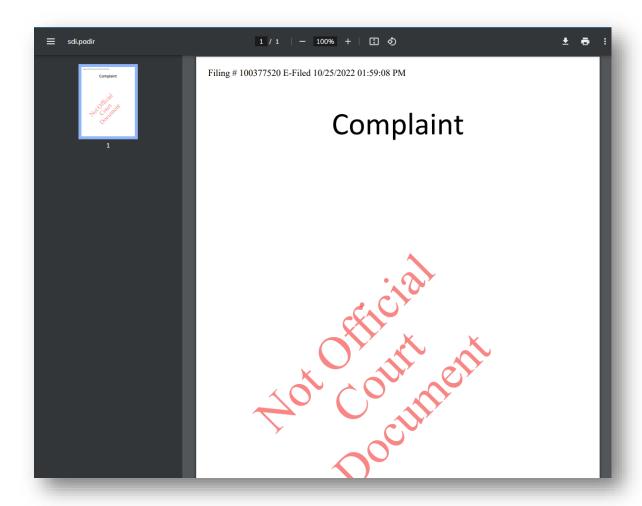
From this page you can view the Notice of Electronic Filing (NEF), download all documents for this submission as a zip file, view the case style (if available), status, court submitted to, submission date, completion date and the UCN assigned to the new case once accepted by the Clerk. To view the NEF, click on the envelope link. To download all documents for this submission as a zip file, click on the page icon next to the submission number.



To view more information about the submission, click on the carat (>) next to the Submission/NEF column. You will see three tabs: Documents, Filing Information and Service List. Click each tab for more information.

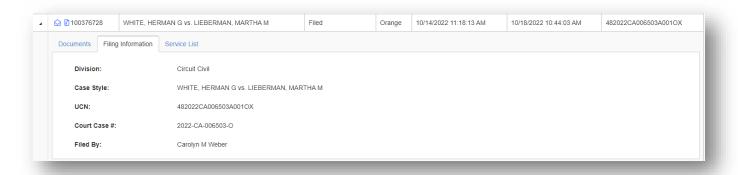


The documents tab will give you access to the documents submitted. The name of the document in the Document column will open the document so you can view, save, or print the document. The document will carry a watermark on every page of the document as shown below.

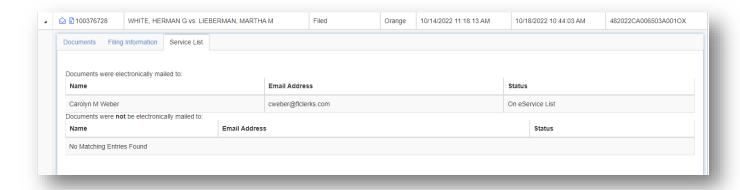


You may view each document individually by selecting the name of the document or you may download all documents using the Download all documents as a zip file as shown above.

The Filing Information tab gives you the Division submitted to, Case Style (if available), the UCN (Uniform Case Number when accepted by the Clerk), Court Case # (after acceptance by the Clerk) and the filer.

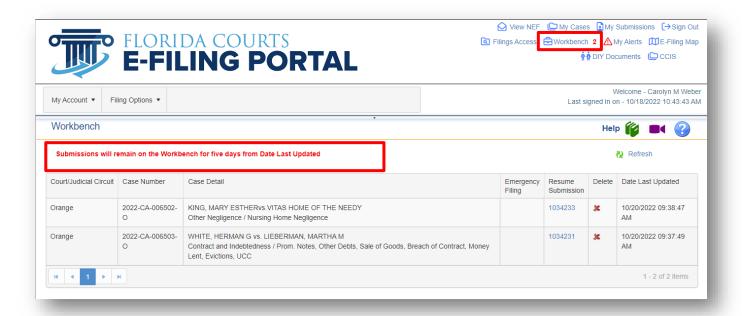


The Service List tab shows who was selected for E-service and who was not. Not all new case submissions will utilize the Service List.



#### Workbench

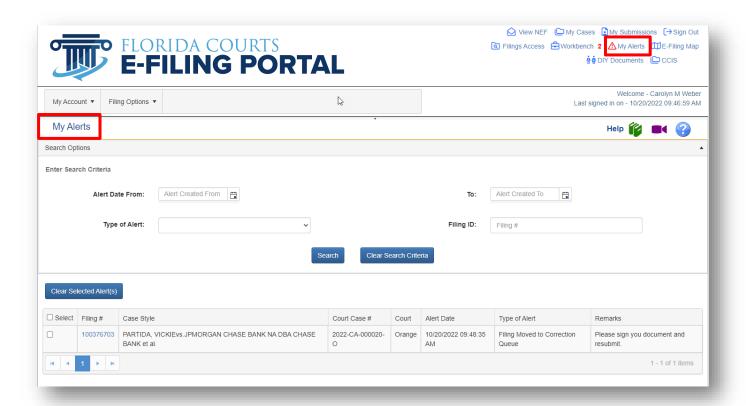
This link will take you to your **Workbench** where any submissions you have begun but not completed or saved to the **Workbench** will be listed. To continue filing the submission, click on **Resume Submission** which is the blue Filing ID number link and complete your filing. To delete the submission, click on the red "x" in the Delete column.



The submissions will remain on the **Workbench** for five (5) days from the Date Last Updated. After five (5) days, they will disappear from the **Workbench**, and you will not be able to recover them.

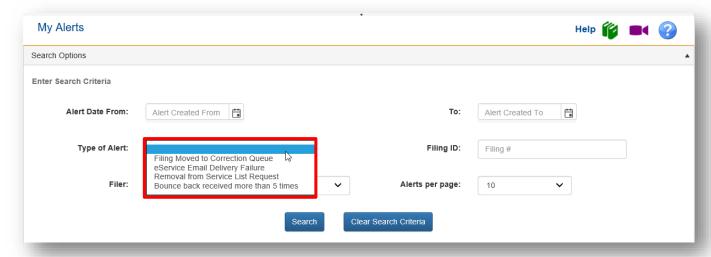
### **My Alerts**

If you have any filer Alerts pending, when you log in to the Portal, you will be taken to your **My Alerts** page and not to the E-Filing Map or if you have designated another Home Page in your Preferences, to that Home Page. The **My Alerts** page will be your Home Page if you have outstanding Alerts. Once they have been resolved/cleared, you will then land at either the E-Filing Map or your designated Home Page.

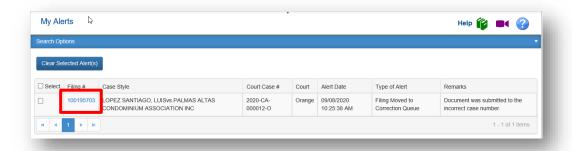


An Alert will be created for the following events:

- Filing Moved to Correction Queue
- E-Service Email Delivery Failure
- Removal from E-Service List Request
- Bounce back received more than 5 times



The Alert will remain in the Active status until the filer clears the Alert at which time the status is changed to cleared and it is no longer considered active. To clear an Alert, place a check in the box under the Select column and click on **Clear**. To resolve the Alert by correcting the document in the Correction Queue, click on the Filing #.

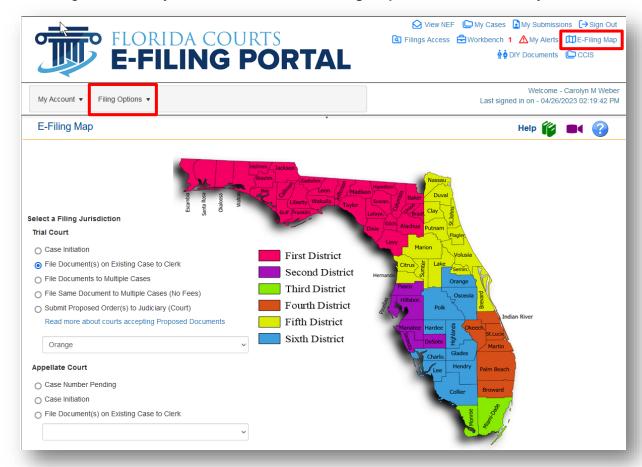


That will take you into the **Correction Queue** where you can replace the deficient document. For more information on the **Correction Queue**, please see the section entitled **Correction Queue**.

If you have active Alerts, when you log in to the Portal you will be taken to the **My Alerts** page. Once all alerts have been cleared or resolved, you will then be taken to the **E-Filing Map** or your designated **Home Page** upon logging in to the Portal.

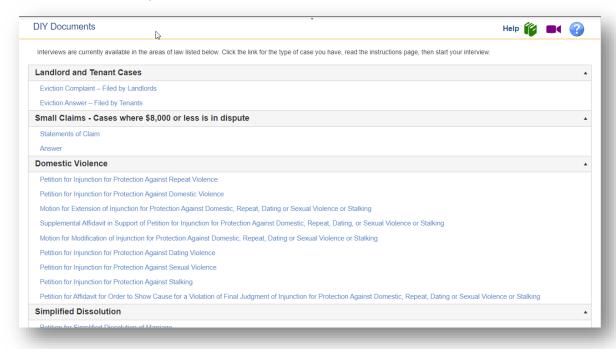
### **E-Filing Map**

The **E-Filing Map** link allows filers to access the **Jurisdictional Map** which allows them to select a filing path. Select either the Trial Court or the Appellate Court filing path. To change counties in which you are filing documents, you must return to the **E-Filing Map** to make a new county selection.

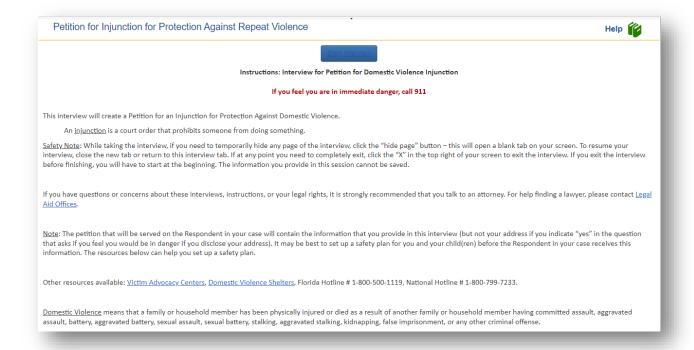


#### **DIY Documents**

The DIY (Do It Yourself) Documents link will take you to the list of interviews that are available for the Portal users. Each link will open an interview process that will ask questions, allow you to answer questions and populate a document that will then drop you into the filing path in the Portal so that you can submit it to the county.



By selecting the name of the document you wish to create, you will be taken to the Instructions page for the interview process.



## **Portal Filer User Manual**

When you have read the instructions and are ready to begin the interview process, click on the blue Start Interview button in the middle of the page and it is shown below.



This will take you into the interview process where you will answer the questions presented. After all questions have been answered, your document will be created.



You may print your document to file later or if you are ready to file your document you will go through the Portal tabs and submit your document to the county.

### **CCIS (Comprehensive Case Information System)**

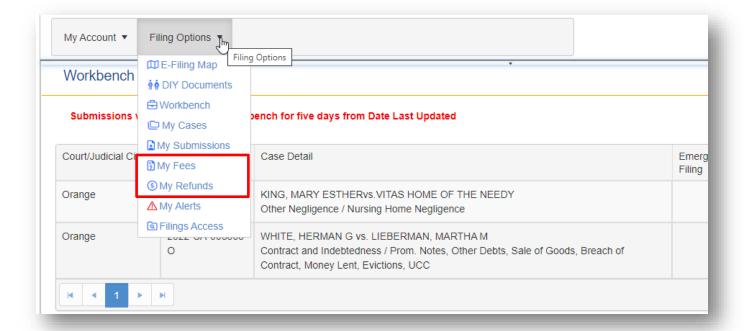
This tab will take you out of the Portal to the Comprehensive Case Information System.



Currently, users of CCIS include the judicial community, state and local law enforcement, state agencies, and the Florida Legislature. It is anticipated that CCIS will be available to the public at some time in the future.

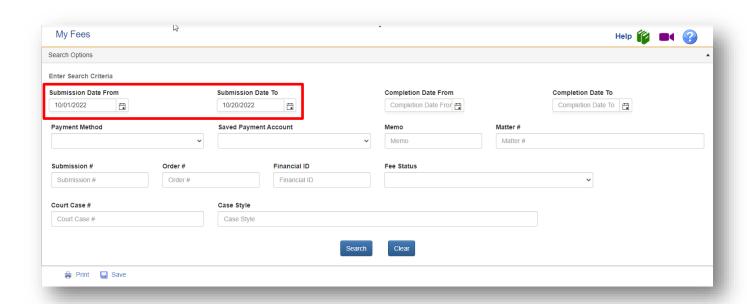
## **Filing Options**

The **Filing Options** tab will take you to the same page as the Quick Links. There are two options available from the Filing Options tab that are not included in the Quick Links, they are **My Fees** and **My Refunds**.

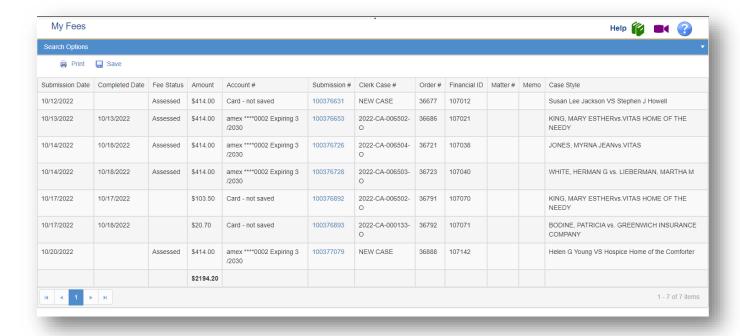


#### **My Fees**

The **My Fees** page will give you access to the fees you have paid for a specified period. The **Search Options** will help you to define your search.



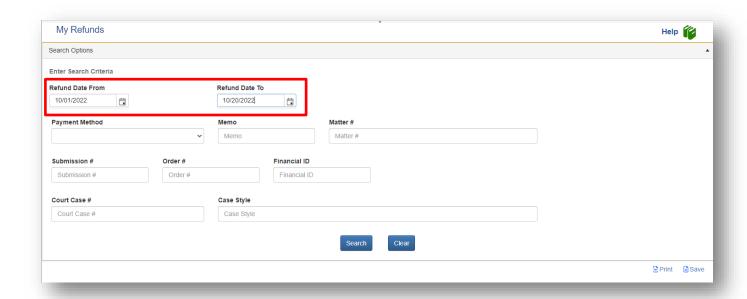
Once you have defined your search, the results will be shown. You will be able to see the Amount, Account #, Submission #, Clerk Case #, Order #, Financial ID, Matter #, Memo (if any) and the Case Style. You can search daily, weekly, or monthly to help you reconcile your payments to the Portal. You can print this screen or save the information for future use.



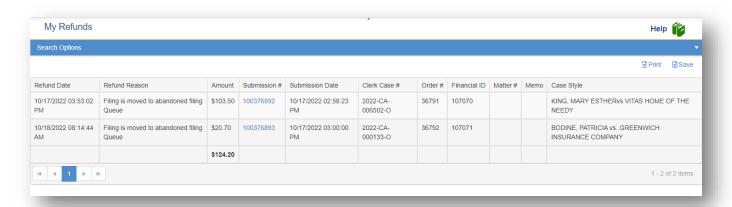
By selecting the Submission # hyperlink, you will be taken to the My Submissions page for that submission where you will find additional information about the submission.

### My Refunds

This page will show the refunds you have received when a submission is sent to the Correction Queue or the Abandoned Filing queue. The **Search Options** will allow you to better define the time frame you are searching. The **Search Options** are shown below.



Once you define your options, the result set will be shown. You will see the Refund Date, Refund Reason, Amount, Submission #, Submission Date, Clerk Case #, Order #, Financial ID, Matter # (if provided by the filer) Memo (if provided by the filer) and Case Style.



By selecting the Submission #, you will be taken to your My Submission page where you will find more information regarding your Submission. You may print or save this page for future use.

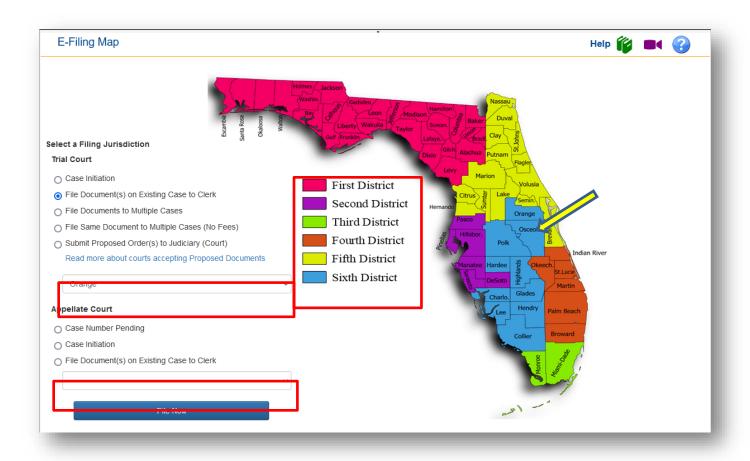
# File Document(s) on Existing Case to Clerk

If you have not filed to a case that has an existing case number, you must begin the filing from the Jurisdictional or **E-Filing Map**.

#### **Process**

Trial Court: Select County from the drop-down or click on the County name in the map.

Appellate Court: Select the district number from the list or a District Court of Appeal from the drop-down list which includes the Florida Supreme Court.

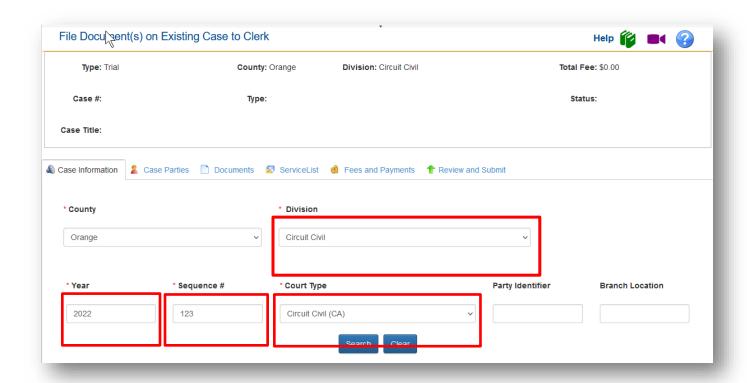


Then select **File Document(s) on Existing Case to Clerk** if the case already exists and then click on **File Now**.

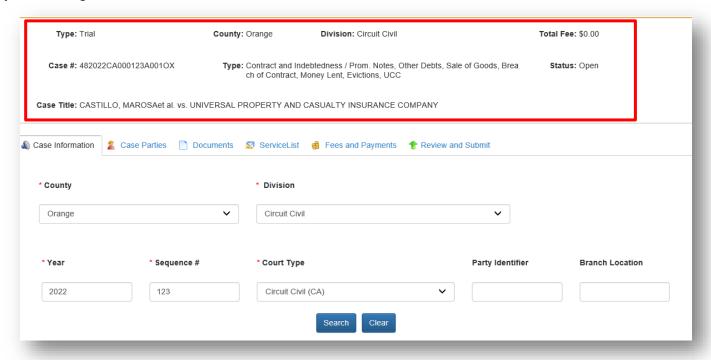
### **Case Information – Trial Court**

To **File Subsequent Document(s) into an existing case**, the filer must know the case number. Select the Division from the dropdown list provided. Enter the case number and click search. The Portal will search for the case record.

- If the county's case management system is not linked to the Portal, 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, case information may not be returned from the county's Case Management System.
  - 1. Select Division
  - 2. Type in Year
  - 3. Sequence number
  - 4. Select Court Type
  - 5. Search

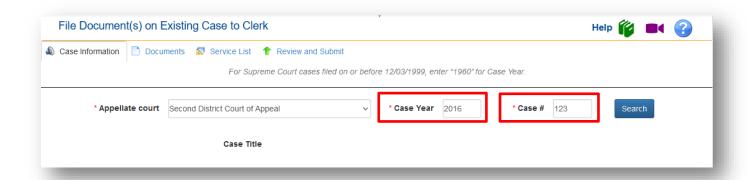


The case information will be displayed [unless the case is a confidential case] so that you can verify you are filing to the correct case. If correct, click on **Next** or click on **Case Parties** in the Menu Bar.

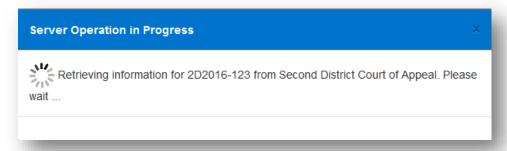


## **Case Information – Appellate Court**

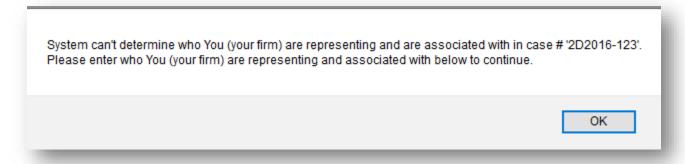
Select the Appellate court, enter the Case Year and Case # and then select Search.



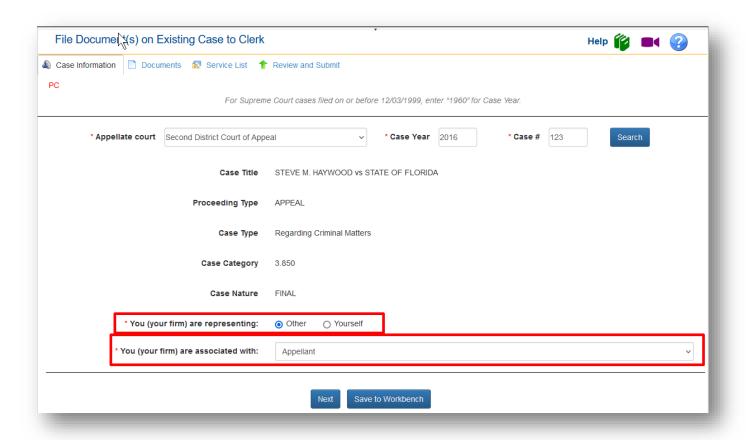
The Portal will retrieve the Case Information from the Florida Supreme Court or the District Courts of Appeal.



A message will present that asks you to choose who you represent and who you are associated with to continue.



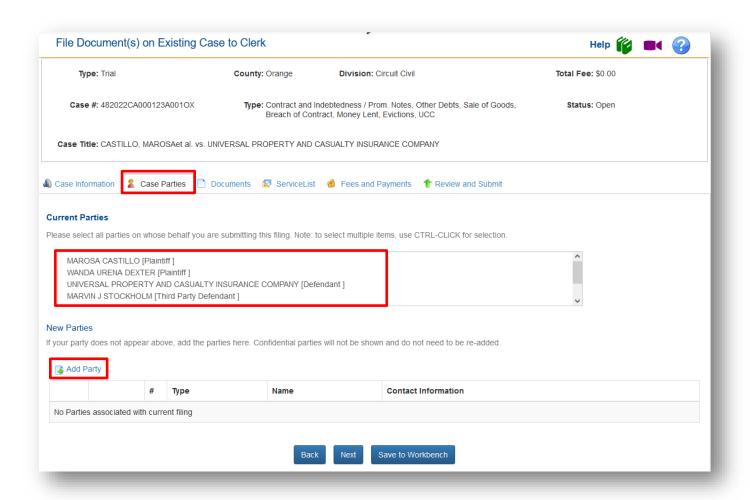
Select **OK** to continue to the **Case Information** page where you will designate who you represent and who you are associated with as shown below designated a Required Field as indicated by the red asterisks.



### **Case Parties - Trial Court**

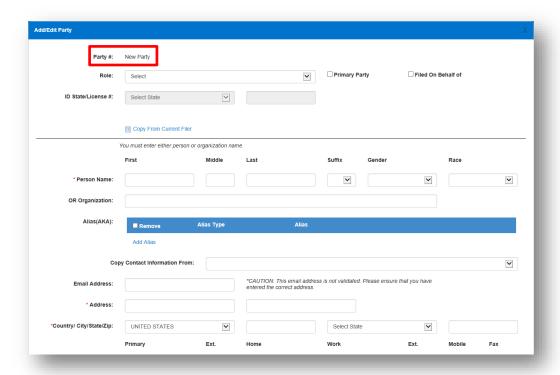
NOTE: Brevard and Volusia County will not allow you to add case parties so this screen will not be available to the filer. All other counties will enter the case party information for their new case.

Select the Party you are filing on behalf of if listed in the Current Parties section. If your party is not listed and the county allows you to add parties to a case, click on the **Add Party** link.



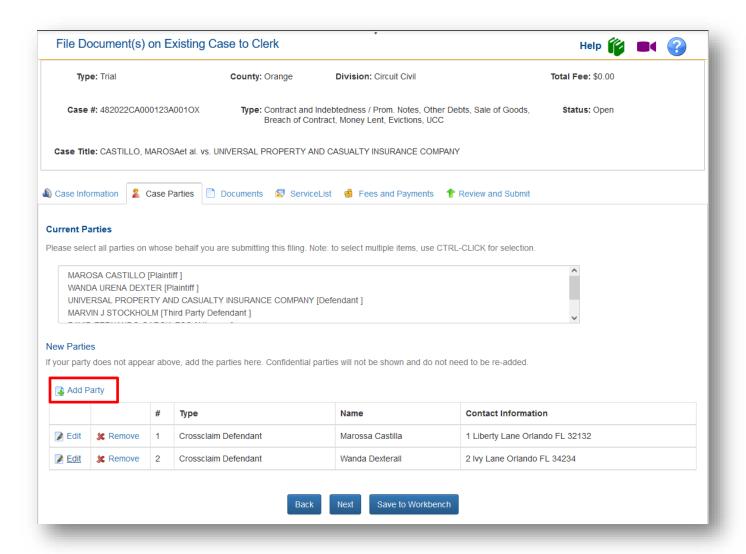
When adding a party, you have 2 options:

- 1. Selecting the **Copy from Current Filer** option will add the filer as a party and fill in the party information with the filer's Portal profile information. This is used when the attorney is adding himself to the case as counsel on behalf of a party. The attorney would not be a primary party.
- 2. Enter the party information after selecting the party. Type the party information directly into the available fields.



Click the **Save** button when the information is 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 so that all parties may be added.



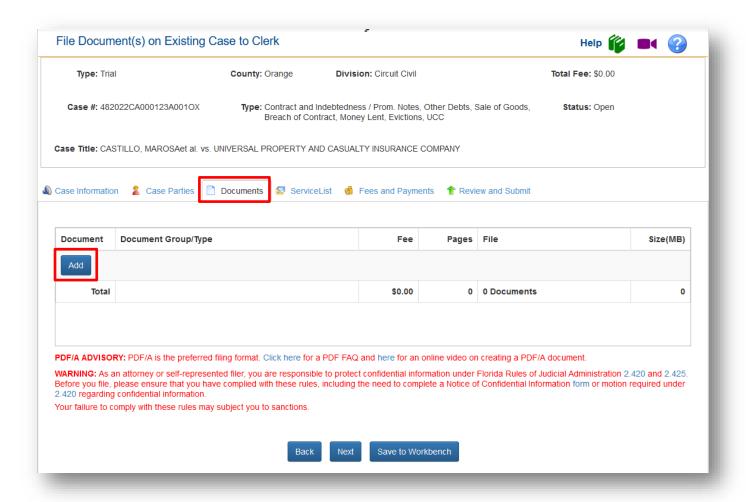
When the filer has completed adding or editing all necessary parties to the case, click the **Next** button. If you need to go back to the Case Information page, select the **Back** button or the **Case Information** tab from the menu bar.

# **Case Parties – Appellate Court**

For the Florida Supreme Court and the District Courts of Appeal, the **Case Parties** tab will not be available. This may change in the future but for now the **Case Parties** tab will not be available.

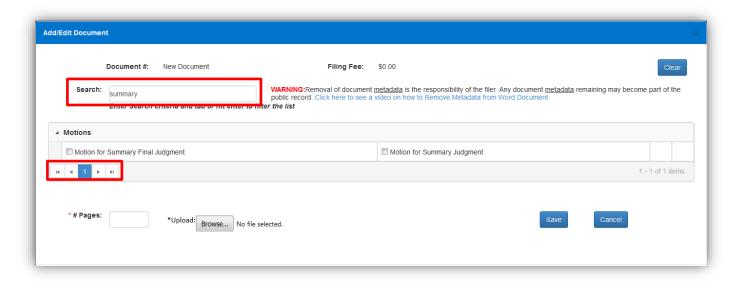
### **Documents - Trial Court**

The documents page is next. You can either click on **Next** at the bottom of the **Case Parties** tab or click on **Documents** in the menu bar. Click **Add** to add a document to the submission.



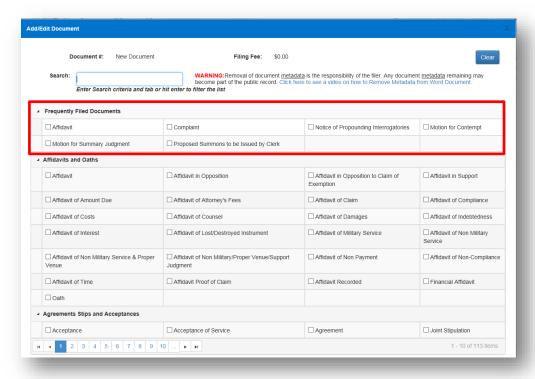
**Note**: There may or may not be an exact match to the document you are filing in the list of documents available to the filer. This list of docket codes is set up the by clerk of each county and the DCA. If the exact name of the document you are filing is not available, select the document that most closely matches the document you are submitting.

You may search for a document by placing your cursor in the **Search** field and typing in your search criteria. Type in a unique word of the name of your document, *i.e.*, 'summary' when you are filing a Motion for Summary Judgment. Then either hit your **tab** or **enter** key to perform the search. Or you may tab through the pages of document descriptions available by using the page number tabs at the bottom of the screen.

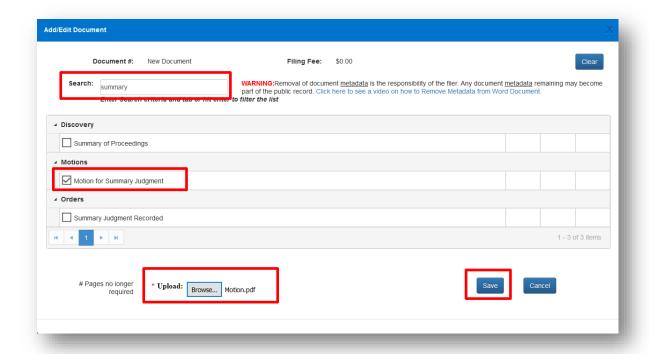


### **Frequently Filed Documents**

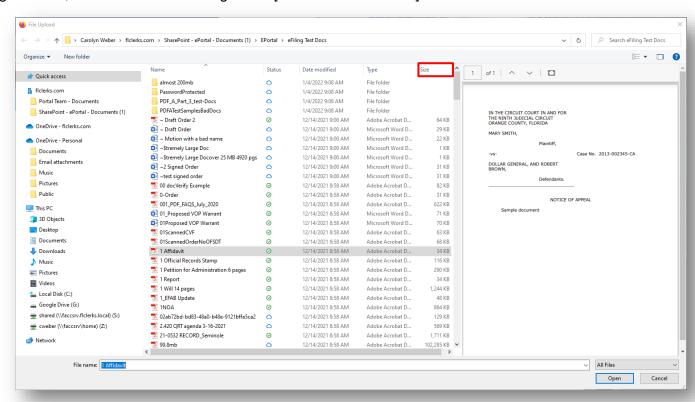
We now have a section on the **Add/Edit Document** page that displays your **Frequently Filed Documents**. We added this so that you can easily find documents that you file on a regular basis without the need to continually search. Based on the documents you file, this section will add more documents to the list.



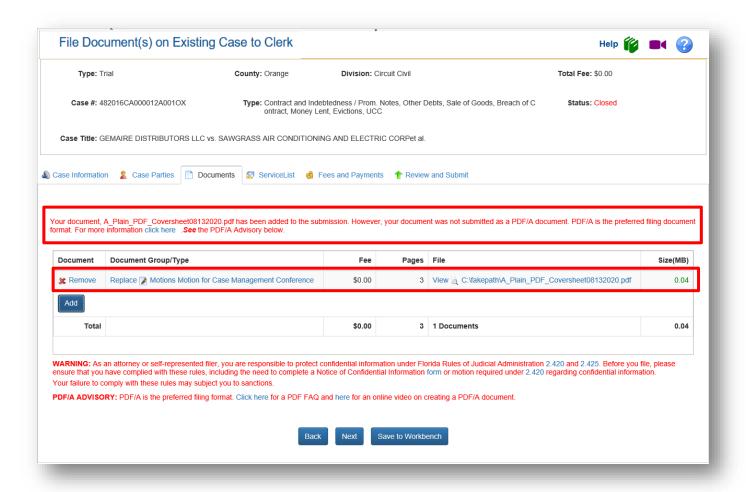
Select the document you wish to file and upload the document. Then click on **Save** to add it to the list of documents you will submit.



To upload your document, browse out on your computer to find your document that you have computer generated, added the electronic signature [s/ATTORNEY NAME] and saved as a PDF/A.



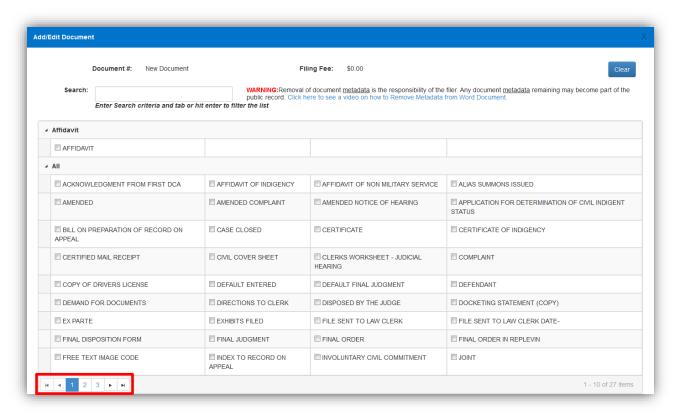
Your document will appear on the Documents page with the file size shown in the far-right hand column. You may upload as many documents as you need to file with the total file size not to exceed 50MB.



If your document is larger than 50MB, break your document down into two separate files and then submit them as individual files. A progress bar will appear when submitting the larger documents to let you know that the upload is in progress. When the file size appears, your document has completely uploaded, and you are ready to continue. The speed of the upload depends on your internet connection.

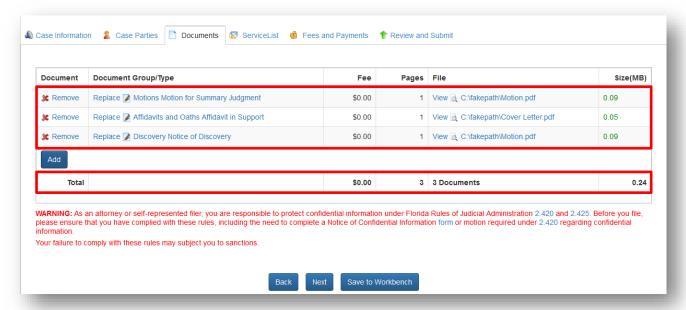
**NOTE:** If you computer generate your document and apply the electronic signature of s/ATTORNEY NAME to your documents and then Print, Publish or Save them as a PDF/A document you will rarely reach the 50MB file size. PDF/A makes a small file, and it would take many pages of document to even get close to the 50MB file size. Please **DO NOT SCAN** your documents just to show a wet ink signature. That is not the preferred way to file documents electronically. If you must scan, please set your scanner to 300 DPI and scan in black and white and **NOT** in color. Scan only what you absolutely must.

If when you perform your search no documents appear in your result set, click on **Clear** to clear out the search field and try again or page through the list of documents by using the page number selection box at the bottom of the screen to find what you wish to submit.



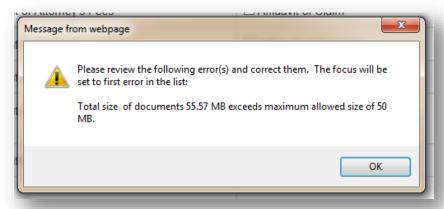
Once you find the document you are going to submit, select that document and browse out on to your computer to locate your computer-generated document and attach it to the submission. You may attach either a Word document or a PDF or PDF/A document to the submission. You may attach as many documents as you wish to submit to the same filing provided they will all be filed to the same case. The preferred file format is PDF/A as approved by the Florida Courts Technology Commission.

The documents will be displayed in the list.

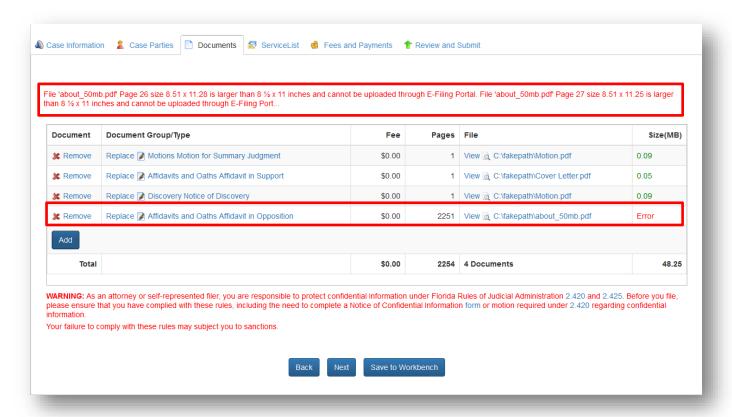


The document page also allows the filer to **Edit** or **Remove** a document. Clicking **Add** again allows the filer to add another document to the case. The size of the document added also appears. The aggregate size of the submission is visible in the bottom right-hand corner of the screen, so the filer knows when they are approaching the submission size maximum of 50MB. When the size appears in the size column, your document has completely uploaded, and you may continue.

The maximum submission size for the trial court filing path is 50MB. If you attach too many documents to the submission, and it exceeds the 50MB size limit, an error message will appear as shown below.



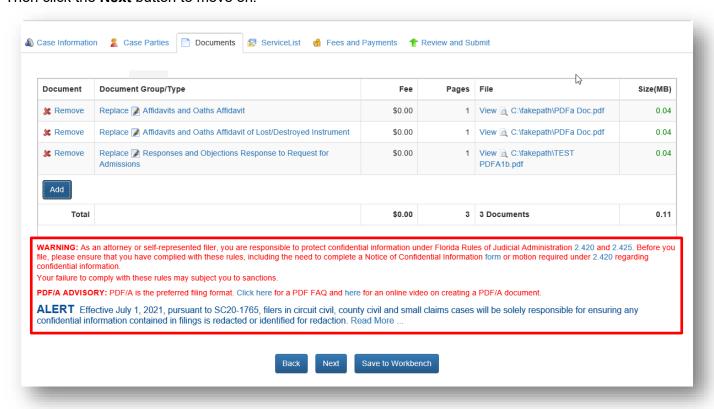
If your document has pages that are greater than the allowed standard of 8 ½" x 11", you will receive an Error after the upload. You will have to remove that document, correct the pages that are not in compliance and upload again.



The Portal does display on the document page the total submission size of all the documents you have uploaded to file. Since PDF/A is preferred file format, the Portal will check your document and advise whether it is a properly formatted PDF/A. If not, you may remove and reformat your document and upload again. If you click on *read more* the Portal will tell you why your document is not a properly formatted PDF/A.

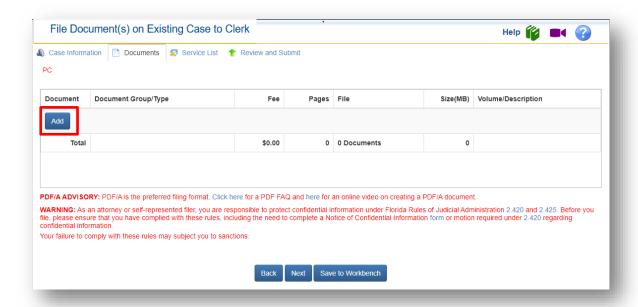
If your total file size exceeds the 50MB file size limit, send off what you have uploaded and use the **Submit** button on the **Filing Received** page to submit the remaining documents. To file documents that are larger than 50MB, break the document down into two separate files and submit them individually.

When the filer has completed adding all necessary document information, be sure to read the Confidential Information section. For confidential documents, the filer must attach the Notice of Confidential Information within Court Filing or a Motion to Determine Confidentiality as per Rule 2.420. Then click the **Next** button to move on.

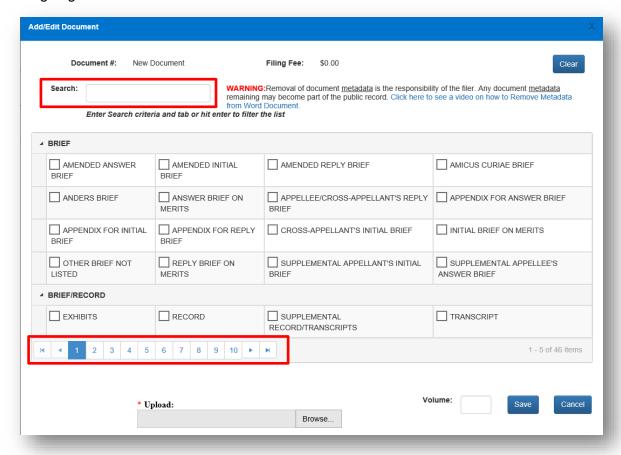


## **Documents - Appellate Court**

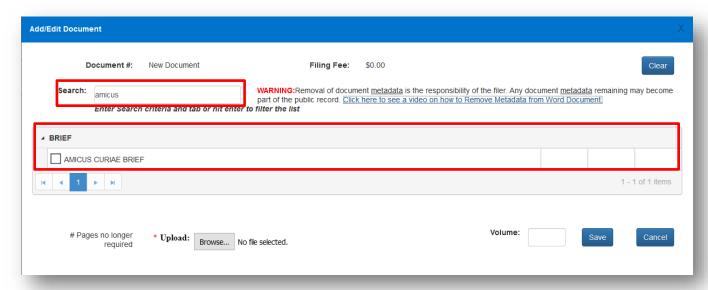
The Documents page is next. Click **Add** to add documents to be filed to the case. The maximum file size for the Appellate Court filing path is **200MB**.



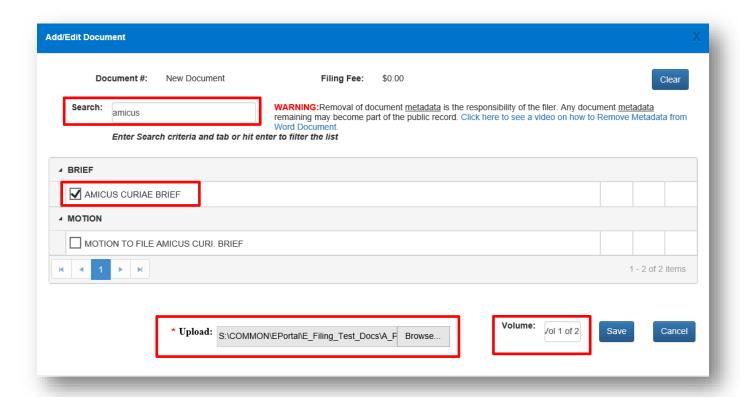
You may search for a document by selecting the **Search** field and typing in your search criteria or you may search the documents available by using the page numbers at the bottom of the screen. If the document group or type is not listed, select the document that most closely resembles the document you are going to file.



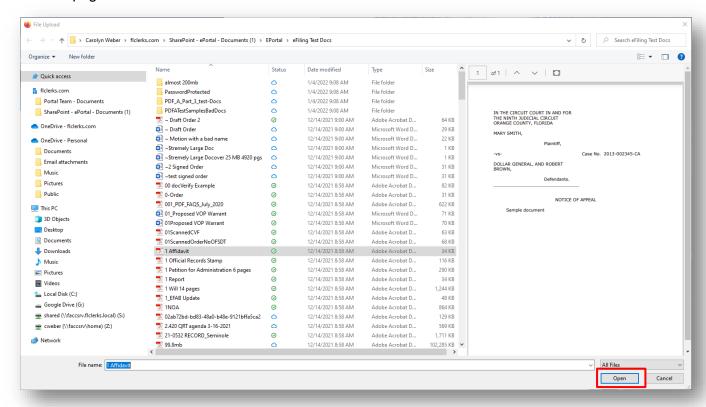
If you use the search feature, type in the most uncommon word in the title of your document and then use your **Tab** or **Enter** key to perform the search. In the below example, we will use the word 'amicus' to limit the result set of our search.



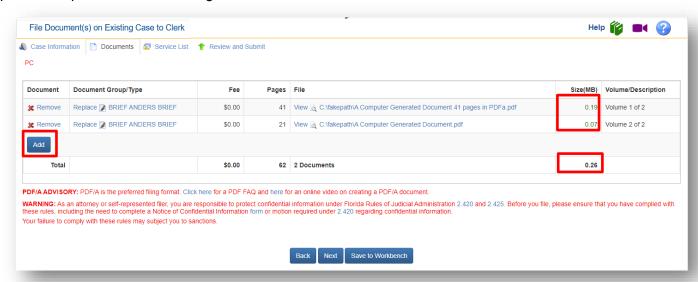
Select the document you wish to file and upload the document. You may also use the Volume field to further identify the document you are submitting. If your document is larger than 200MB, break your document down into two separate files and then submit them individually using the additional text **Volume** field to identify the volumes. Then click on **Save** to add it to the list of documents you will submit.



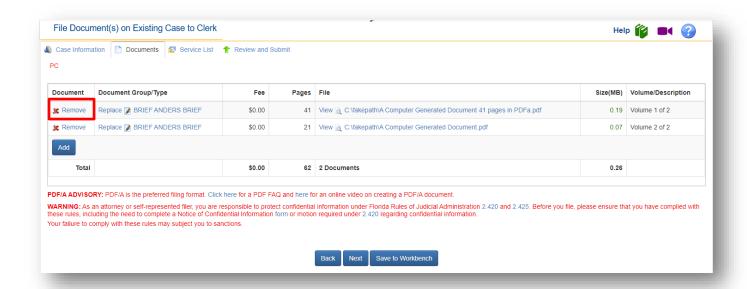
To upload your document, browse out on your computer to find your document that you have computer generated, added the electronic signature, and saved as a PDF/A. Click on Open to attach it to the document page and then **Save**.



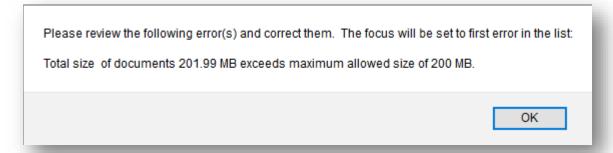
Your document will appear on the **Documents** page with the file size shown in the far-right hand column. You may upload as many documents as you need to file by selecting **Add** and repeating the process explained above as long as the total file size does not to exceed 200 MB



The documents will be displayed in the list. You may also remove any document added in error by clicking on the red X next to the word **Remove**.



The maximum submission size is 200 MB. If you attach too many documents to the submission, and it exceeds the 200 MB size limit, an error message will appear as shown below.



To file documents that are larger than 200 MB, break the document down into separate files and submit them individually.

When the filer has completed adding or editing all necessary document information, be sure to note the Confidential Information warning section. For confidential documents, the filer must attach the Notice of Confidential Information within Court Filing or a Motion to Determine Confidentiality as per Rule 2.420.

**WARNING:** As an attorney or self-represented filer, you are responsible to protect confidential information under Florida Rules of Judicial Administration 2.420 and 2.425. Before you file, please ensure that you have complied with these rules, including the need to complete a Notice of Confidential Information form or motion required under 2.420 regarding confidential information. Your failure to comply with these rules may subject you to sanctions.

Then click the **Next** button to move on.

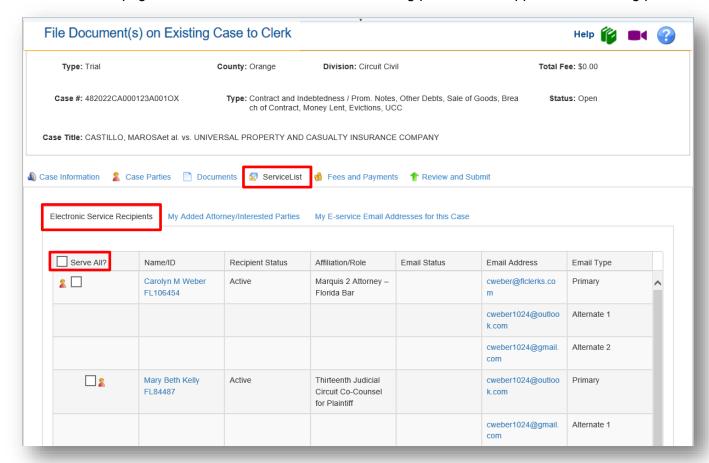
#### **Frequently Filed Documents**

We now have a section on the **Add/Edit Document** page that displays your **Frequently Filed Documents**. We added this so that you could easily find documents that you file on a regular basis without the need to Search. For more information please see **Documents – Trial Court section** of this Manual.

#### **Service List**

Next you see the ServiceList page. You must select from the Service Recipient List the parties you wish to serve by placing a check in the box next to the name of the people you wish to serve. You may select the entire list by placing a check in the box next to 'Serve All?' in the column header.

The **Service List** page is the same for both the Trial Court filing path and the Appellate Court filing path.

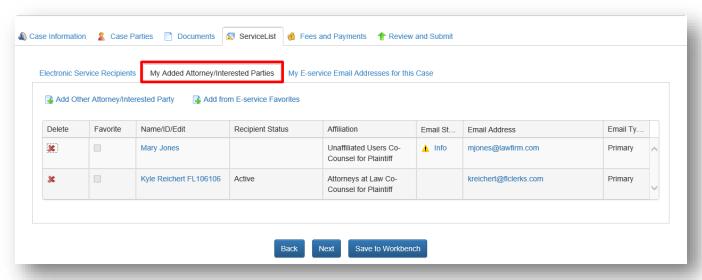


Any email address that has received a bounced back email will be flagged and should not be selected for E-service. Any person added to the E-service List that does not wish to receive E-service on this case and has requested removal will also be flagged and should not be selected for E-service.

If you have a bounce back flag on your email address, click on the **Info** link. This will allow you to see how many bounce backs and when they were received at the email address in question. You will be able to reset that email address if you believe it to be a valid email address. The next time that email address receives a bounce back, the **Info** icon will reappear until the issue is resolved. If you have received more than five (5) bounce back emails, the icon will turn red, and a warning will be presented. If that email address is selected for E-service, a message to the filer will appear advising them that the selected email address has received more than five (5) bounce backs. That email address will not be included in E-service and will appear on the Notification of Electronic Filing (NEF) as "Not selected for E-service." Be sure you correct the bad email address or check with your email provider to add the Portal's E-service email address to the white page of your provider.



You may add anyone that does not appear on the Electronic Service Recipients list to the Service List by using the **My Added Attorney/Interested Parties** link.



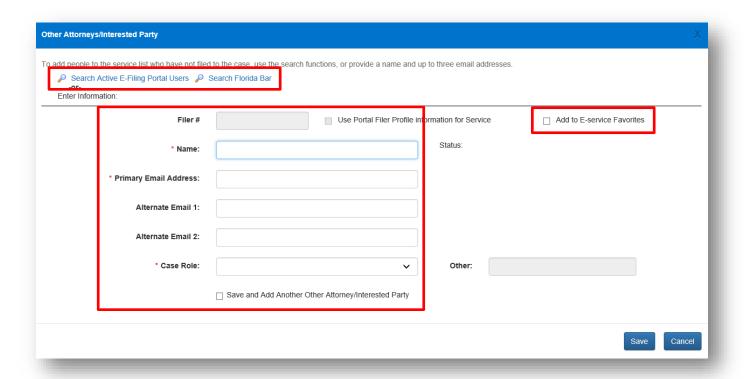
### Adding Parties to the E-service List

To add a person to the E-service list for a case, from the **My Added Attorney/Interested Parties** tab there are now two ways to do so.

#### **Add Other Attorney/Interested Party**

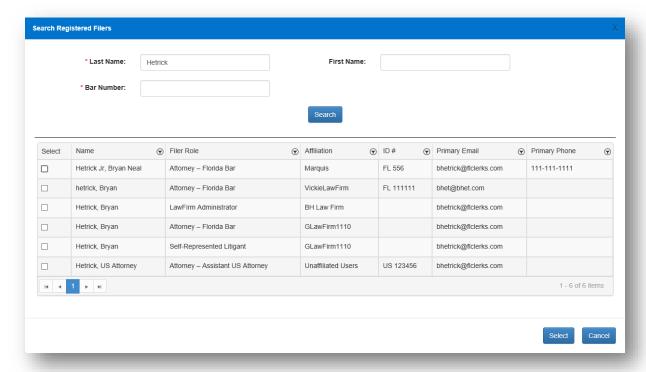
When you select **Add Other Attorney/Interested Party**, you will be able to add E-service Recipients to this case four different ways:

- 1. Search Active E-Filing Portal Users
- 2. Search Florida Bar
- 3. Free Text
- 4. Add from E-service Favorites List

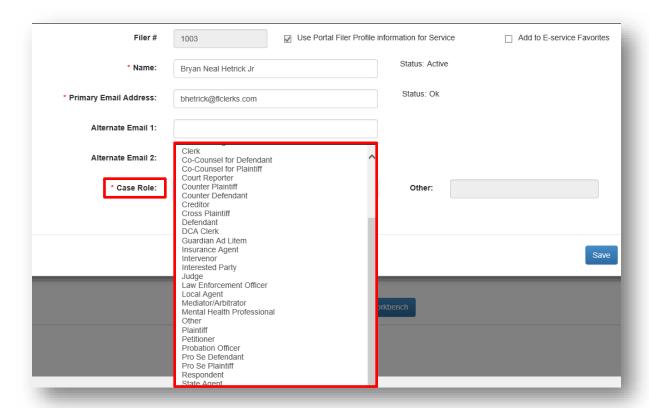


### Search Active Portal Users

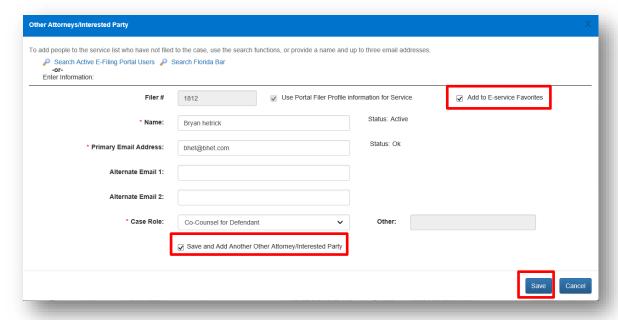
When you select this link, type in the Last Name or the Bar Number of the person you are searching for to add to this E-service List and then select **Search**.



Place a check in the appropriate box and click on **Select**. Then select the **Case Role** that this person plays in this case from the drop-down.



If this person is someone that you frequently add to E-service lists, you may now select to add this person to your E-service Favorites list. To do so, place a check in the box next to **Add to E-service Favorites** in the upper right-hand corner of the screen and then click on **Save**. If you need to add another Other Attorney/Interested Party, click on 'Save and Add Another Other Attorney/Interested Party' at the bottom of the screen.



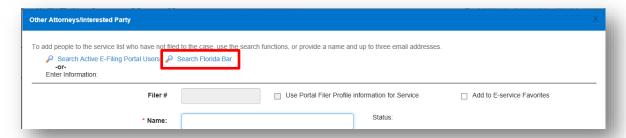
That will add this person to the E-service list for this specific case as well as add this person to your E-service Favorites list so that the next time you need to add this person to a case, you can select **Add** 

**from E-service Favorites** which will show all of the E-service recipients that you have saved to your Favorites list for quick and easy adding to an E-service list. The Add Other Attorney/Interested Party screen will remain, so you easily add another party.

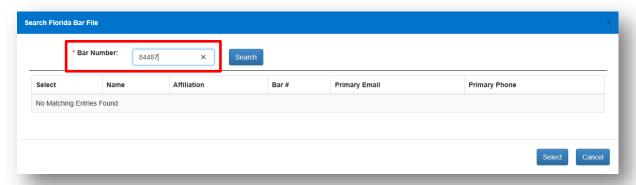
To remove participants from your E-service Favorites go to the **My Account** menu, **My Profile** and select the **E-service Favorites** tab. For more information on removing people from your E-service Favorites List, please see **Portal Navigation** located in the beginning of this User Manual.

#### Search Florida Bar

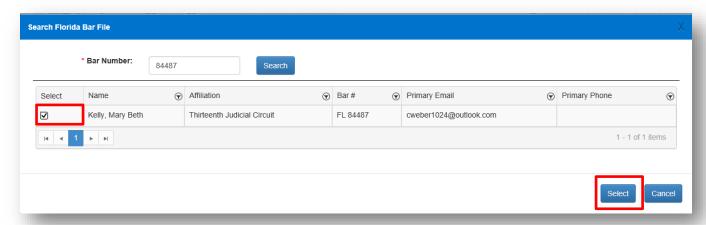
Click on the Search Florida Bar link.



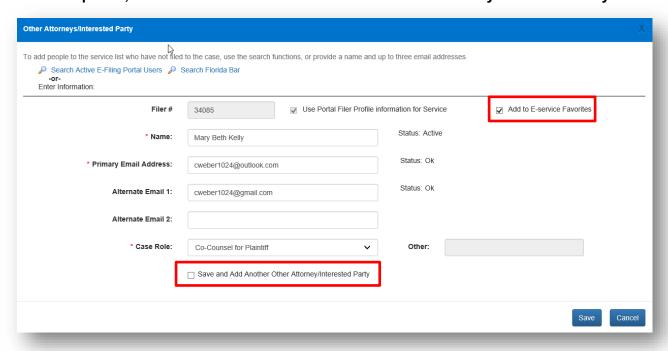
Type in The Florida Bar number of the person you are adding to the E-service recipient list and click on **Search.** 



That will pull up the attorney with that Florida Bar number. Place a check in the **Select** box and then click on **Select**.



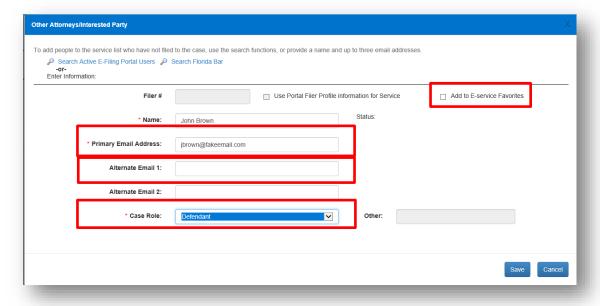
That will add this person as an Other Attorney/Interested Party to this E-service list. If you want to add them to your E-service Favorites list place a check in the appropriate box. Be sure to select the Case Role of this E-service Recipient and then click on Save. If you do not need to add any more E-service recipients, uncheck the "Save and Add Another Other Attorney/Interested Party.



This Florida Bar Attorney has now been added to the E-service list for this case as well as to your E-service Favorites list.

#### Free Text the Information

Type in the information into the appropriate required fields. Then click on **Save** to add this person to the E-service list for this case.

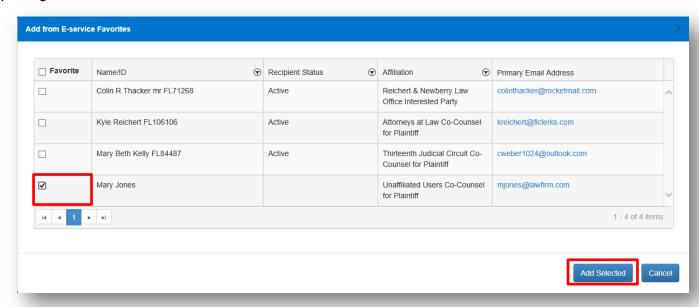


They are added to the Electronic Service recipients list for this case.

#### Add from E-service Favorites

From the **My Added Attorney/Interested Parties** tab click on **Add from E-service Favorites**. That will pull up your E-service Favorites list that you have been creating as you add E-service participants to E-service lists in your cases. To manage this list (remove names) please see the **Portal Navigation** section of this User Manual.

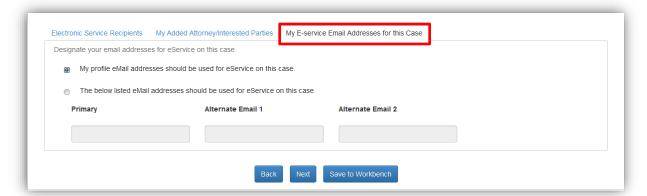
Select the name of the person you wish to add to this E-service list from your E-service Favorites list by placing a check in the **Favorite** column next to the name. Then click on **Add Selected**.



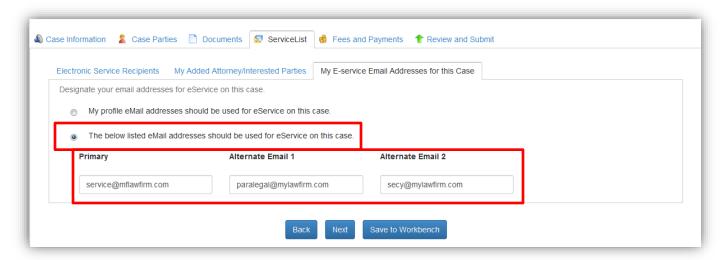
The person you selected from your E-service Favorites list will be added to the E-service list for this case.

### My E-service Email Addresses for this Case

You may designate E-service email addresses for this specific case if you wish to use email addresses that are different from your Profile email addresses. To do this, select the **My E-service Email Addresses for this Case** link.

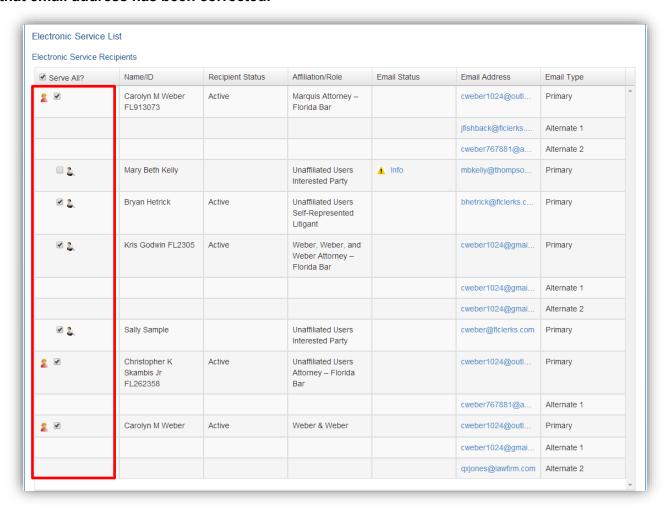


Then select the appropriate designation and if selecting new E-service email addresses to be used for this one case only, type in the new email addresses and then click on **Next**.



A valid E-service list will have a check in the box next to the name of the people you wish to serve as is shown below. By selecting the person you wish to serve, all email addresses linked to that person will receive service of the documents filed in this case.

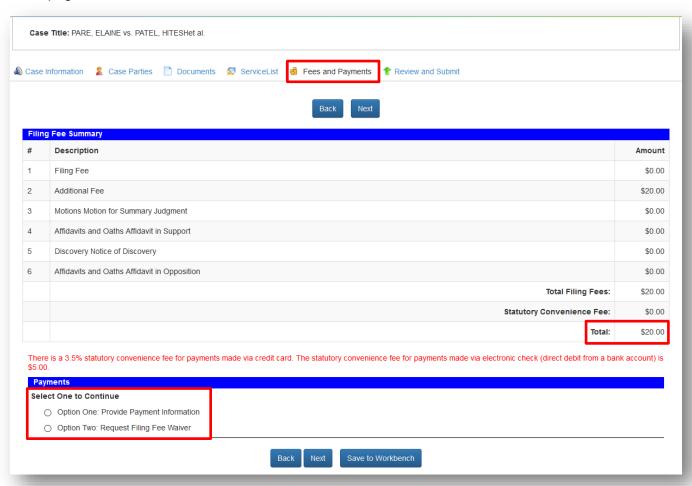
NOTE: Do not serve an email address that has received a bounce back until the problem with that email address has been corrected.



## **Fees and Payments**

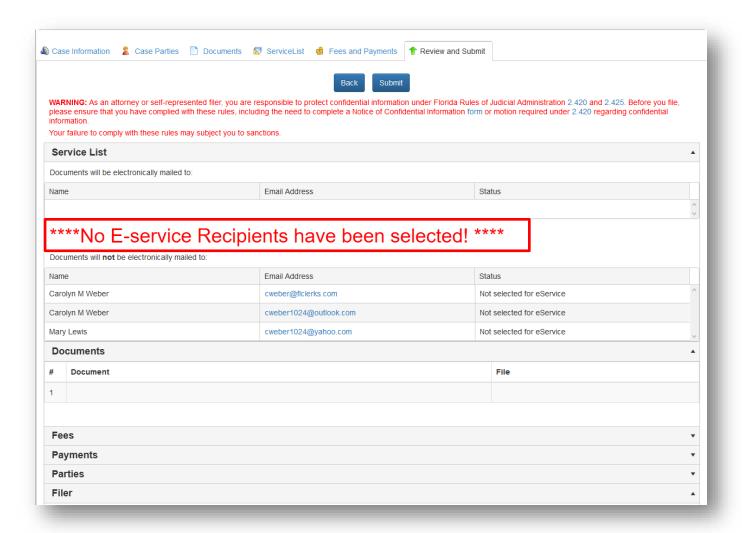
After the **ServiceList** page you are taken to the **Fees and Payments** page. If there are no statutory fees required, select **Next**. If you need to return to the **ServiceList**, click **Back**. There are no fees to file electronically, only the statutory filing fees apply. For most documents that are filed, there will be no fee. For more information on paying a fee through the Portal, see the **Case Initiation** section of this User Manual.

For the Appellate Court filing path, the **Fees and Payments** section is displayed on the **Review and Submit** page.

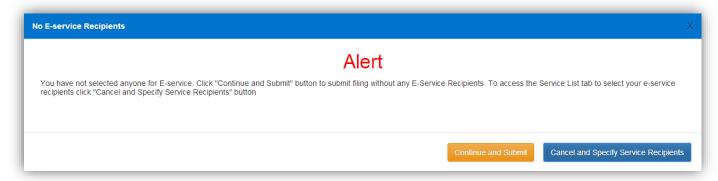


### **Review and Submit - Trial Court**

Review all information carefully, clicking **Submit** is **FINAL**. If there are any edits or changes that need to be made, the filer must click back to the **Case Information**, **Case Parties**, **Documents**, **ServiceList**, and/or **Fees and Payments** tab(s) to make the changes and re-save the information. If no one has been selected for E-service on the ServiceList page, a notice will appear in the **ServiceList** section of the **Review and Submit** page. To add to the E-service list go back to the **ServiceList** page.

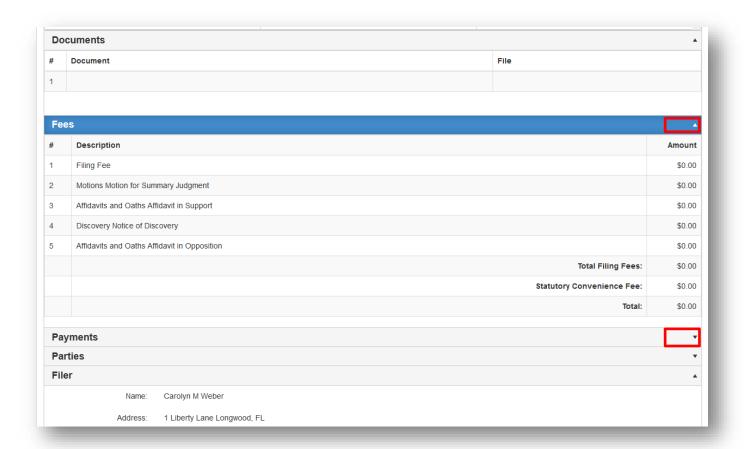


If no E-service Recipients have been selected from the **ServiceList** page, and you continue through the **Review and Submit** page, an alert will appear advising you one last time of the deficiency and allow you to add E-service Recipients or continue the filing process.



Once any edits to information have been made, click **Submit**. At any time during the filing process, you may select '**Save to Workbench**' which will save your steps so far and allow you to submit your document later.

To open any of the information on the **Review and Submit** page, click the arrow to the far right of the item.

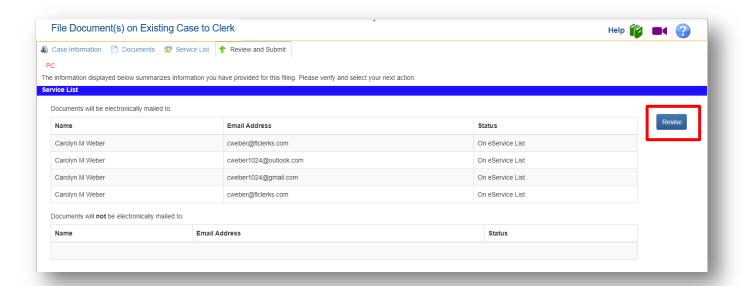


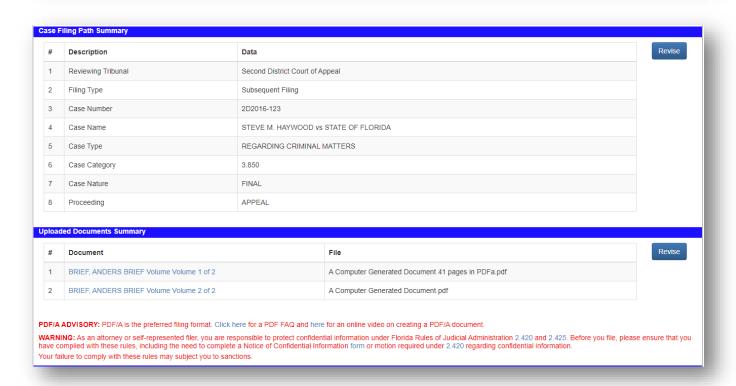
That will display all the information in that tab. If all the information shown is correct, you are ready to submit your filing.

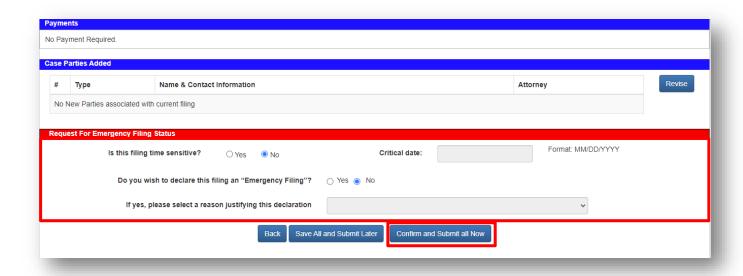
# **Review and Submit - Appellate Court**

Review all information carefully, clicking **Submit** is **FINAL**. If there are any edits or changes that need to be made, they will appear in red, and the filer may use the **Revise** button to go back to the location of the error and make any changes that are necessary. You may also designate this filing as an Emergency by completing the required information in the Emergency section.

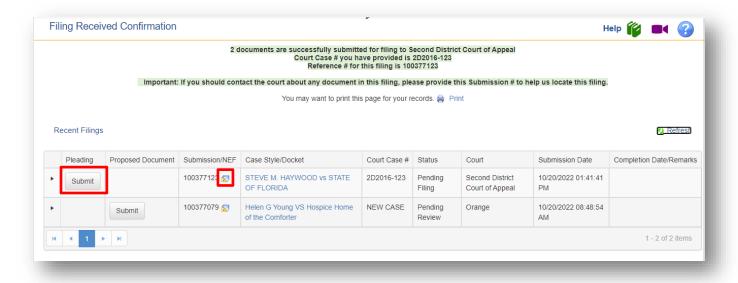
Once any edits to information have been made and you are ready to submit your filing, click **Confirm** and **Submit All Now**.



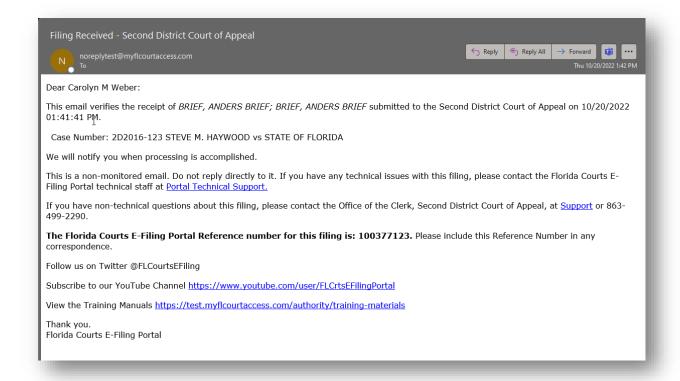




The User is then taken to the **Filing Received Confirmation** page where you can select **Submit** under the Pleading column to submit another document to the case. It also gives you access to the Notice of Electronic Filing (NEF) that was sent out to provide E-service of your document.

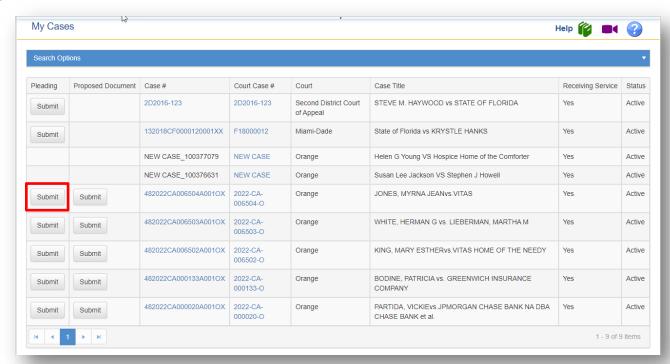


A Filing Confirmation email is sent to the email addresses on the filer's profile as well as to the Email Log in the Portal. If the filer has elected in his **Email Preferences** not to receive this email notification, then they will not receive the Filing Received email.

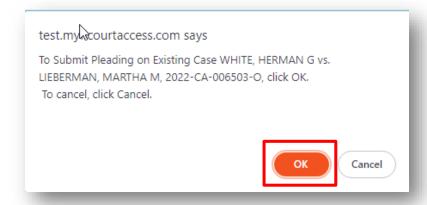


## Filing to an Existing Case from the My Cases Page

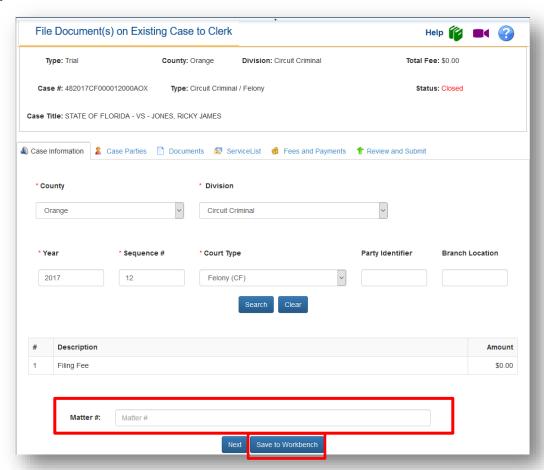
Once you have filed electronically to a case, the case will be added to your **My Cases** page. If you want to file to that case again, go to the **My Cases** page and click the **Submit** button next to the case you wish to file to.



You will receive a message to verify that you wish to file to the case. Click **OK** to continue or **Cancel** to select a different case.

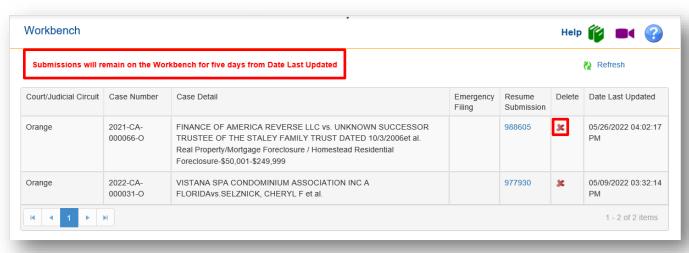


The Portal will retrieve the case information from the county's Case Management System and take you to the bottom of the **Case Information** page in the Portal where you may enter in a **Matter #** and then continue to file your submission. The **Matter #** may be the number you have assigned this case in your Firm. That will help you track fees from the **My Fees** page. At any point during the creation of this submission, you may also **Save to Workbench** which will allow you to save the submission at any point to your Workbench and file it later.



Then click on **Next** to continue the filing process by attaching your documents, selecting your E-service recipients, providing a payment method if necessary and submitting your filing.

If you select **Save to Workbench** you will be able to resume filing this submission later. The submission will remain in the Workbench for five (5) days from the **Date Last Updated**.



### **Case Initiation**

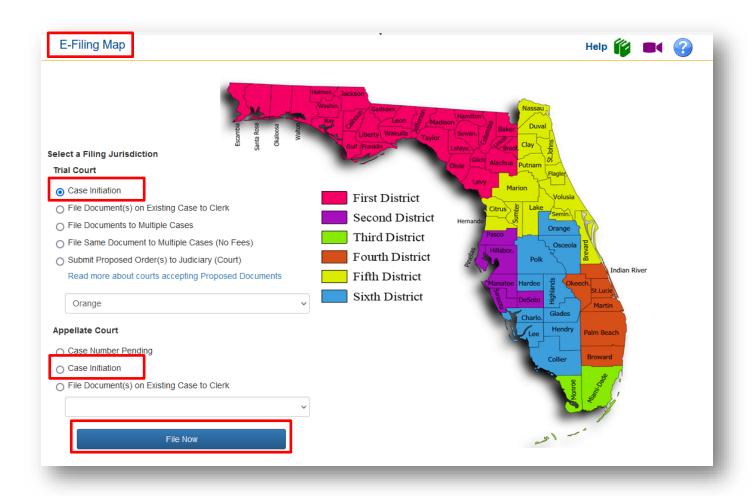
If you are creating a new case with the Clerk, you begin your filing from the E-Filing Map.

**Trial Court** Select county from the drop down or click on the county in the map

**Appellate Court** Select the district number for a District Court of Appeal or use the drop-down list

which includes the Florida Supreme Court.

Choose the **Case Initiation** Link for the appropriate jurisdiction, select the county filing to for the trial court path and select either a District Court of Appeal or The Florida Supreme Court when filing a new case and then click on **File Now**.



The filer is taken to the **Case Information** page.

#### **Case Information – Trial Court**

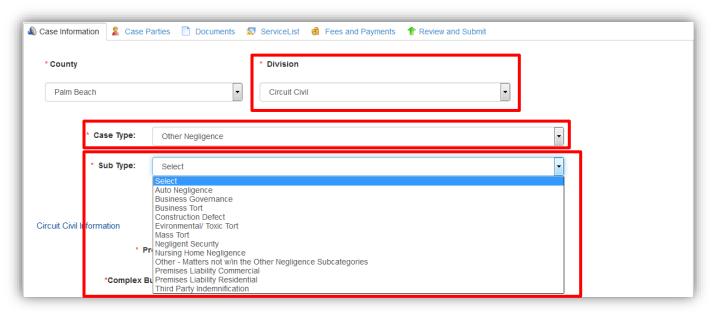
Filers can enter new case information. After the new case submission is reviewed by the county staff and accepted for filing, a case number (Uniform Case Number (UCN)) will be assigned. The filer will receive a confirmation email regarding the filing and the new case number will be recorded in the email. Once the case number is assigned the **My Submissions** page will be populated with the case number in place of the 'new case' text and the case will also be listed in the **My Cases** page.

From the available drop-down menus select the following:

- Division
- Case Type
- Sub Type

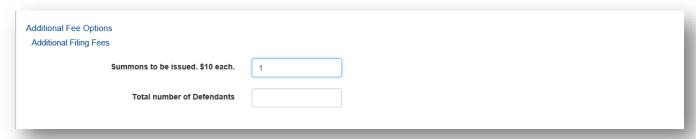
Required data elements, marked by the red asterisk, are put forth by the Florida Courts Technology Commission (FCTC) and are required for all divisions. These data elements vary from one division to another.

Circuit/County Civil Information



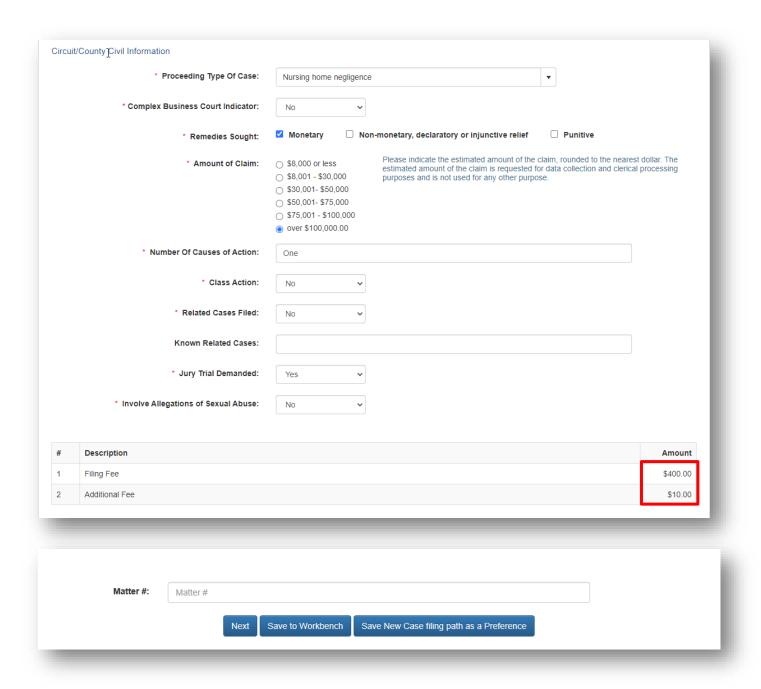
### Additional Fee Options Additional Filing Fees

If you wish a summons to be issued, type in the number of summons you need.

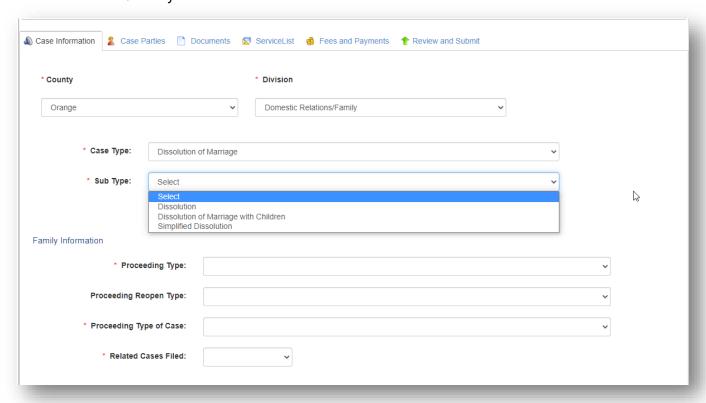


### Circuit/County Civil Information

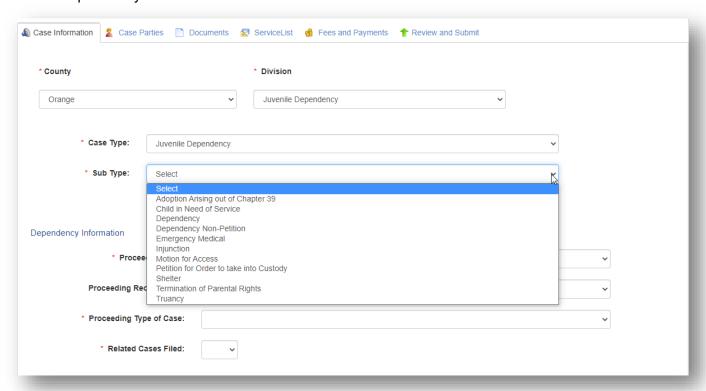
Fill in the case information appropriately and be sure to select the Amount of Claim range. The fields marked with a red asterisk are required fields. Your total filing fee is shown below. Click Next to continue.



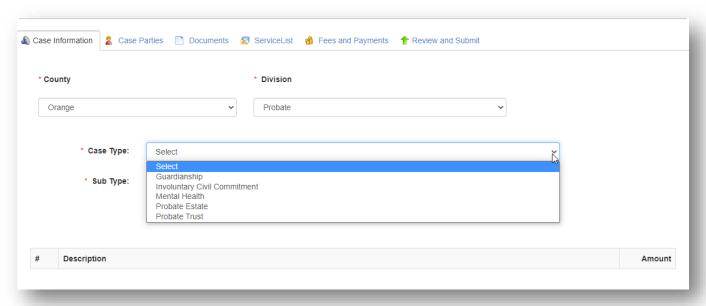
### Domestic Relations/Family



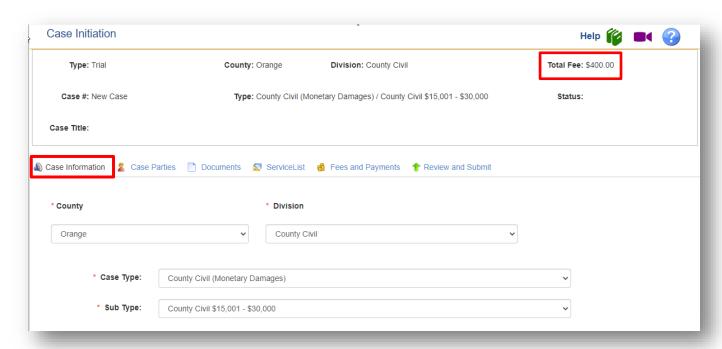
### Juvenile Dependency



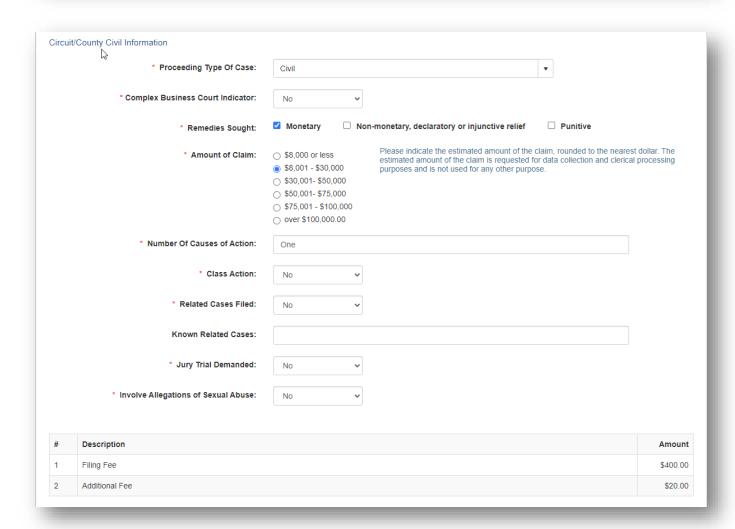
#### **Probate**



If there are Additional Fees associated with the Case Type, they will automatically be displayed for selection as necessary. The filing fee amount(s) automatically calculates based on the selections made by the filer.







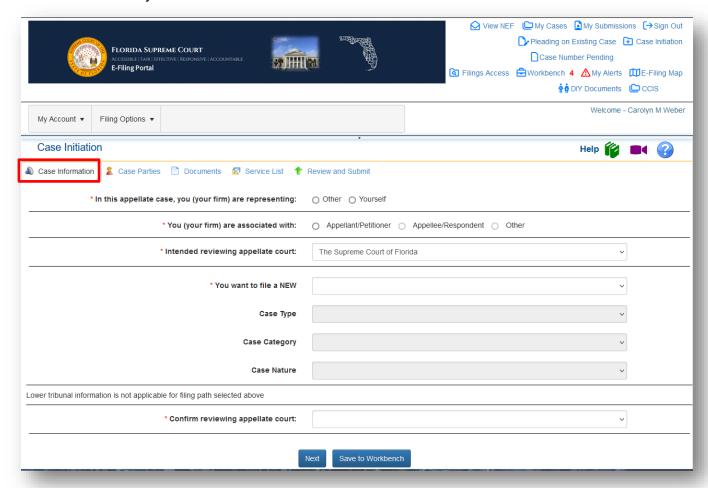
When complete, click on the **Next** button. The filer may move through the process by clicking on the **Next** button when each page is complete or by clicking on the tabs (Case Information, Parties, Documents, Payments, Review and Submit) on the menu bar.

You may also **Save to Workbench** if you desire to complete this new case later. You may also **Save New Case Filing Path as a Preference**. When you complete the Case Information page, you may select that Division, Type and Sub-Type as a preference in the Portal. If you file a certain type of case on a routine basis, this will help you lessen the keystrokes necessary to complete the Case Information page. When you log into the Portal if you have selected **Save New Case Filing Path as a Preference** 

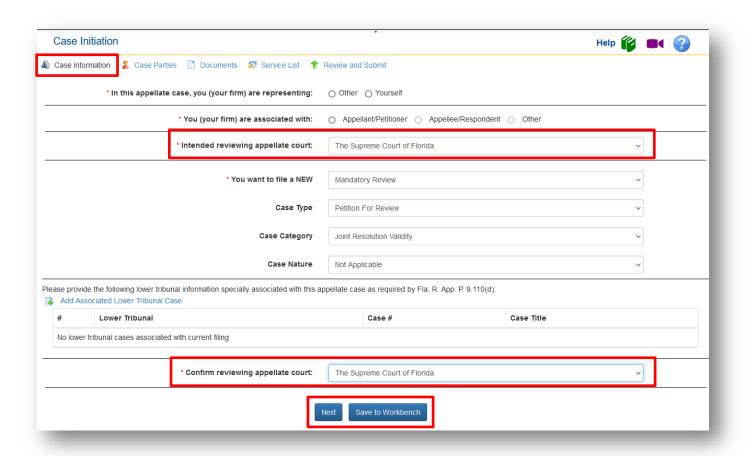
you will be immediately taken to the completed Case Information page provided you have no Alerts pending.

## **Case Information – Appellate Court**

All required fields on this page are marked with a red asterisk (\*). Be sure to complete each piece of information to submit your new case.

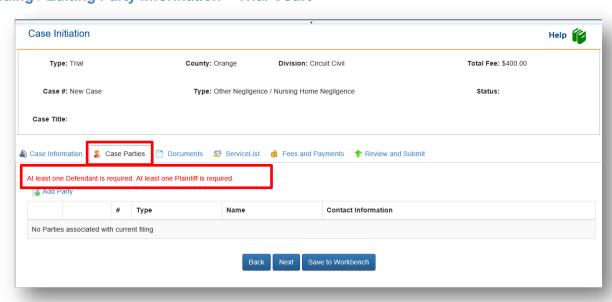


Please complete the required information as shown by the red asterisk. At the very bottom of the page, you will need to confirm the reviewing appellate court by selecting the court you are submitting your new case to from the drop down. It must match the 'Intended reviewing appellate court' you selected at the top of that page.



Then click on **Next** to get to the Documents screen. To save this filing to the Workbench to be continued later, click on **Save to Workbench**.

### **Adding / Editing Party Information – Trial Court**

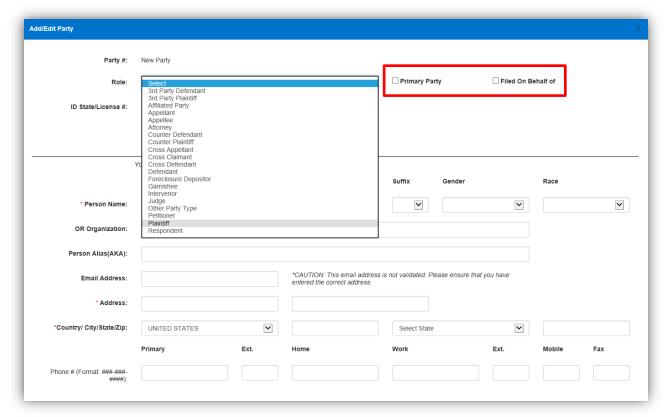


Select Add Party and then Select **Role** and select either **Primary Party** and/or **Filed On Behalf of**. Complete all required fields. Click **Save**.

- Role Description of party's involvement in the case (defendant, petitioner, etc.)
- Primary Party Party with direct connection to the case *i.e.*, Plaintiff, Defendant, Counter-Plaintiff, Counter-Defendant, etc.
- Filed On Behalf of Identifies the party that the new case is being filed on behalf of and will be charged with payment of the statutory filing fee. Party must be identified whenever fees are collected.

NOTE: When creating a new case and you select the Plaintiff Role and enter the information, the Filed on Behalf of should also be selected since you the attorney are creating the case on behalf of your client the Plaintiff.

If you wish to continue creating this new case to be submitted later, click on **Save to Workbench** and you will then be able to resume filing later.

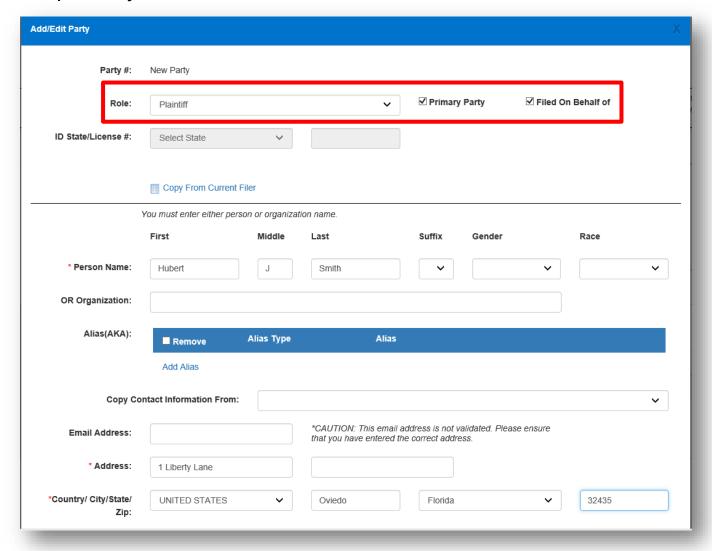


NOTE: The parties you can add is based on the County you are filing to. Brevard and Volusia County does not allow the filer to add party information.

When adding a party, you have 2 options:

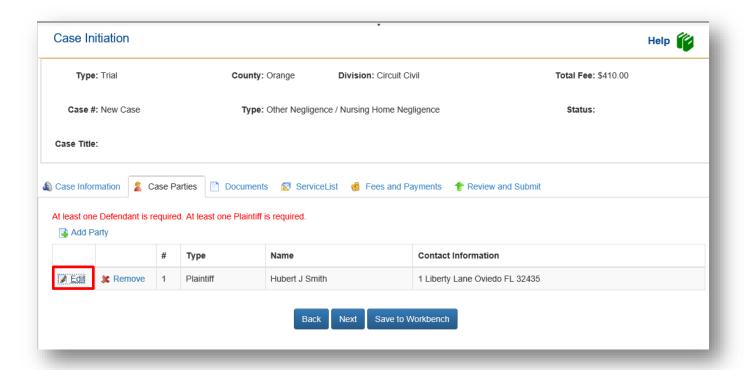
- 1. Pressing on the **Copy from Current Filer** option which will add the filer as a Party and fill in the Party information with the filer's Portal profile information. It should be used when the attorney information is captured and added to the county's Case Maintenance System.
- 2. Enter party information directly into the fields available.

### Add all parties to your case.

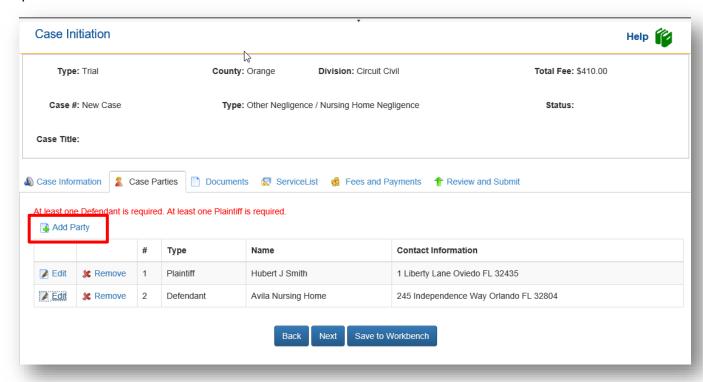


Click the **Save** button when entries are complete.

The party page refreshes and the party that was just added will be displayed in the list. If you need to make any changes to the Party information, click on **Edit** to the left of the Party information.



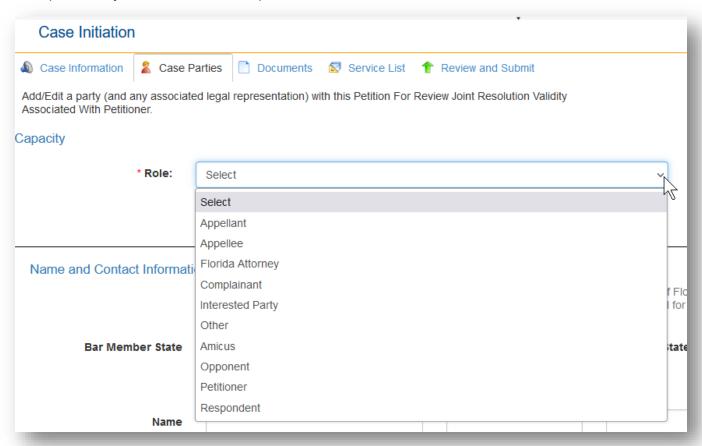
The party page also allows the filer to **Remove** a party on a case. Click the red x to remove a party that you have added in error. Clicking **Add Party** allows the filer to add another party to the case until all parties have been added.



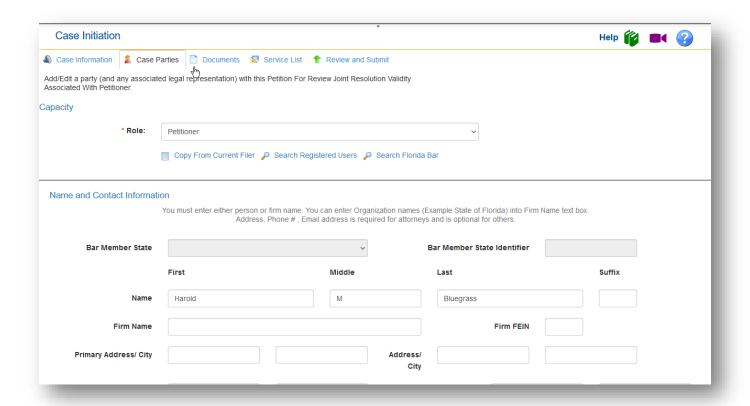
When the filer has completed adding or editing all necessary party information, click the **Next** button. If you need to return to the Case Information page, click the **Back** button or select **Case Information** from the menu bar. If you wish to save your submission for filing later, click on **Save to Workbench** and the submission will be save so you can resume filing later from the Workbench.

### **Add/Edit Case Parties at the Appellate Court**

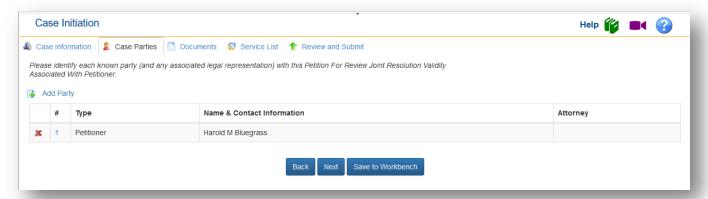
To add parties to your case, use the drop down to select the **Role**.



Select the **Role** and then complete the name and contact information.



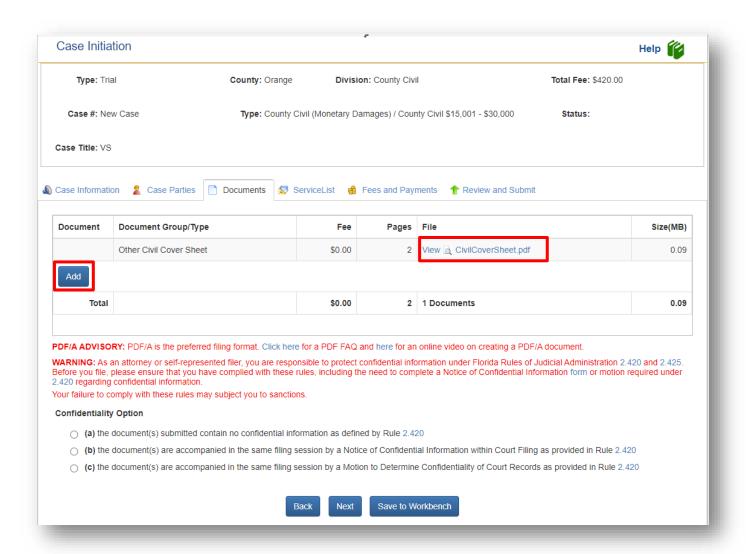
Once you have completed the party information, you may add additional parties, or you may opt to **Save** and **Show Parties**.



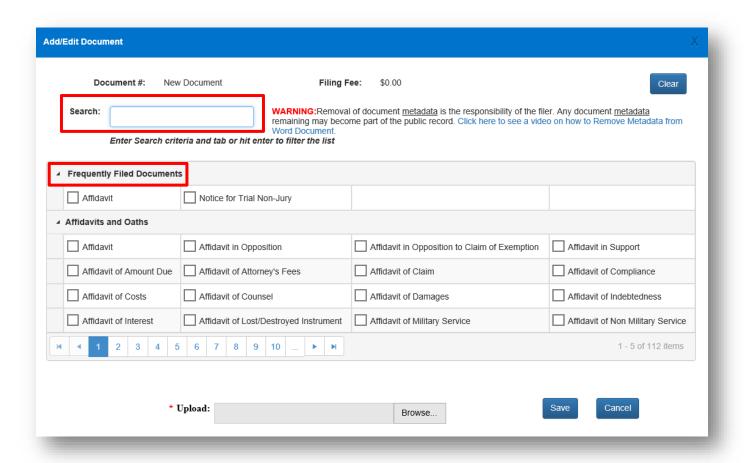
After you have added all parties, click on **Next** to move to the **Documents** tab.

## **Adding Documents – Trial Court**

The filer is then moved to the **Documents** page. Some counties will have the case initiation required documents listed on the **Documents** tab. You will also see that the Civil Cover Sheet has been auto generated for you. This is the civil cover sheet pursuant to SC19-1354. The Portal has taken the case information you input on the previous screens and generated this document for you. To view the document, click on **View** under the File column.

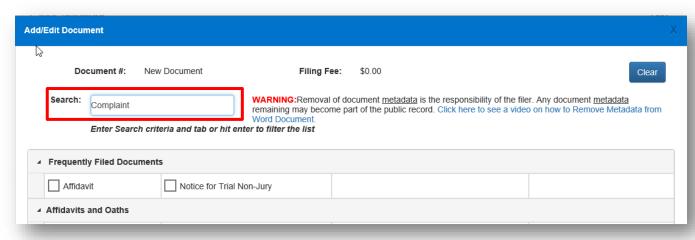


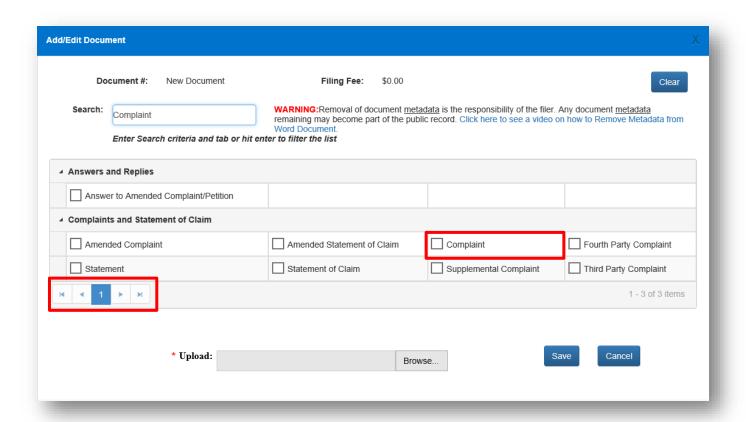
When you are ready to add your documents to the documents tab, click **Add** to add a document to the case. That takes you to the Add/Edit document screen.



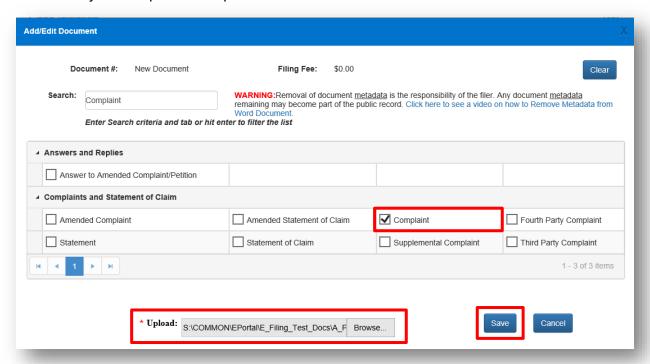
### **Searching for a Document**

Type in a brief description of the document you are going to file and then use the **Tab** or **Enter** key. That will narrow the result set shown that matches your search criteria. You may also search for your document by using the page tabs at the bottom of the **Add/Edit Document** page.



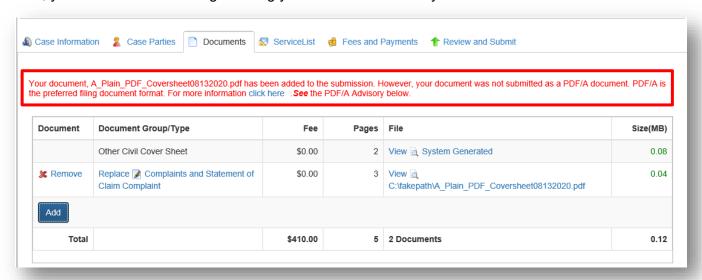


Select the document you wish to file and then browse out to locate your computer-generated PDF/A document on your computer and upload the document to the submission. Then click on **Save**.

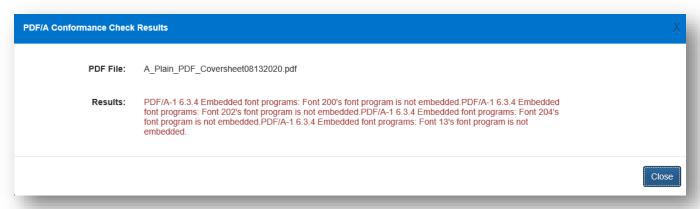


## **Portal Filer User Manual**

The Portal will then add that document to the list. If your document is a properly formatted PDF/A, you will not receive any warning information from the Portal. If your document is not a properly formatted PDF/A, you will receive a warning advising you what is deficient in your document.

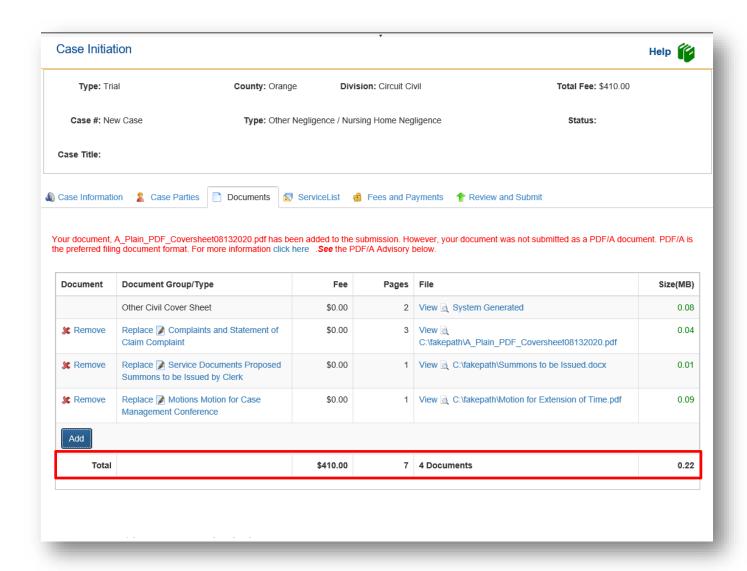


Click on the **click here** in the warning message shown above to see the deficiency reasons.



The reason why most documents are not properly formatted is because the filer does not include all the fonts required for that document when they convert it to a PDF/A. For more information on how to properly format a Word docx to a PDF/A, see <u>FAQs on PDF/A</u> April 2021 which is found on the Florida Courts E-Filing Authority web page under the Help menu. <a href="https://www.myflcourtaccess.com">https://www.myflcourtaccess.com</a>

Continue to add all the documents you wish to submit with this new case on the **Documents** page.



The **Document** page also allows the filer to **Replace** or **Remove** a document. Clicking **Add** again allows the filer to add another document to the submission. The size of the document added also appears, so the filer knows when they are approaching the submission size maximum of 50MB. When the size appears in the size column, your document has completely uploaded, and you may continue.

The following warning is on the Documents page. Please take time to read this warning and be advised.

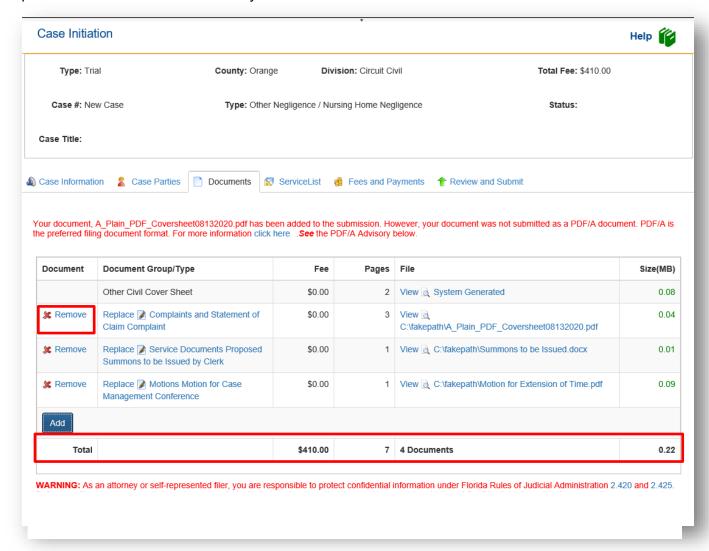
WARNING: As an attorney or self-represented filer, you are responsible to protect confidential information under Florida Rules of Judicial Administration 2.420 and 2.425. Before you file, please ensure that you have complied with these rules, including the need to complete a Notice of Confidential Information form or motion required under 2.420 regarding confidential information

Your failure to comply with these rules may subject you to sanctions.

PDF/A ADVISORY: PDF/A is the preferred filing format. Click here for a PDF FAQ and here for an online video on creating a PDF/A document.

ALERT Effective July 1, 2021, pursuant to SC20-1765, filers in circuit civil, county civil and small claims cases will be solely responsible for ensuring any confidential information contained in filings is redacted or identified for redaction. Read More

If your documents go over the maximum submission file size of 50 MB, you will see a message advising you that you have exceeded the maximum submission file size limit of 50 MB and advising you to remove documents so that you can submit your filings. Break that large document down into separate files and file them individually.



When the filer has completed adding or editing all necessary document information, please note the confidentiality warning.

For confidential documents, the filer must attach the Notice of Confidential Information within Court Filing as per RJA 2.420.

WARNING: As an attorney or self-represented filer, you are responsible to protect confidential information under Florida Rules of Judicial Administration 2.420 and 2.425. Before you file, please ensure that you have complied with these rules, including the need to complete a Notice of Confidential Information form or motion required under 2.420 regarding confidential information.

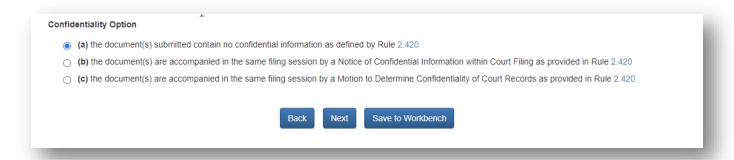
Your failure to comply with these rules may subject you to sanctions.

PDF/A ADVISORY: PDF/A is the preferred filing format. Click here for a PDF FAQ and here for an online video on creating a PDF/A document.

ALERT Effective July 1, 2021, pursuant to SC20-1765, filers in circuit civil, county civil and small claims cases will be solely responsible for ensuring any confidential information contained in filings is redacted or identified for redaction. Read More ...

## **Portal Filer User Manual**

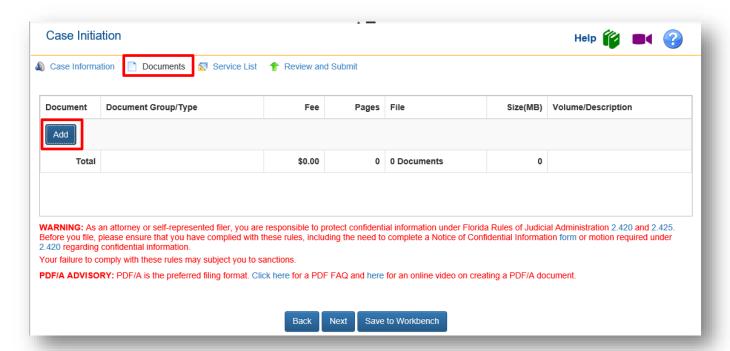
Finally on the **Documents** tab, select the Confidentiality Option that applies to your case initiation submission. This Confidentiality Option appears on Circuit and County Civil case types only. If you select Option (a), your case initiation submission will be immediately available in the Filings Access review queue. It will remain there for five (5) days.



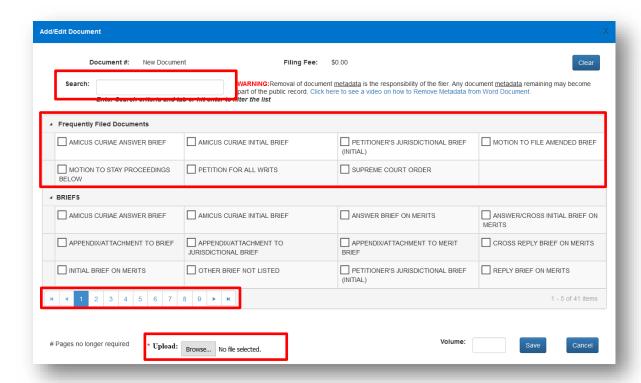
If Option (b) or (c) is selected, the submission is deemed to contain confidential information and for (b) a Notice of Confidential Information within Court Filing must accompany the submission. If Option (c) is selected, a Motion to Determine Confidentiality of Court Record must accompany the submission. These case initiation submissions will not be available in the Filings Access review queue.

# **Adding Documents – Appellate Court**

The **Documents** page is next. Click **Add** to add documents to the case.

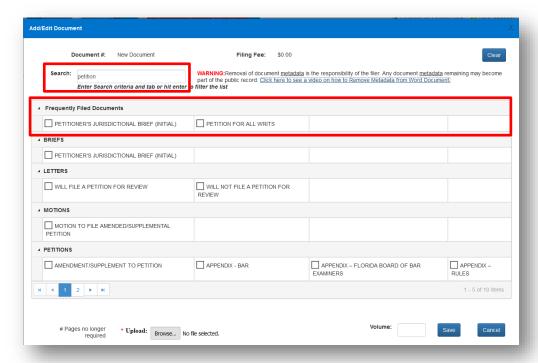


The Portal will always display your **Frequently Filed d**ocuments in the top section of the **Add/Edit Document** screen. You may search for a document by selecting the **Search** field and typing in your search criteria or you may search the list of documents you can file using the page number tabs at the bottom of the screen.

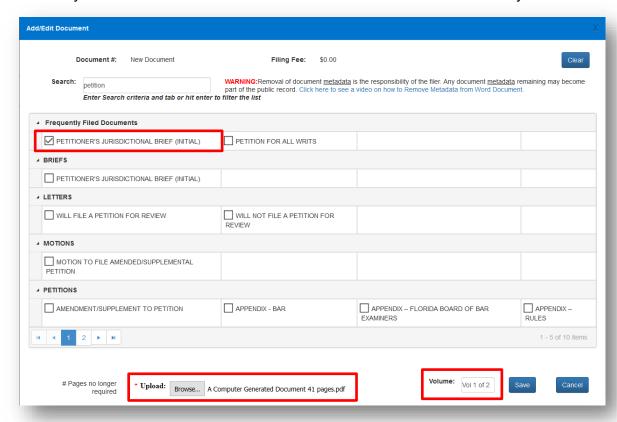


If the exact document description is not listed, select the document that most closely matches the document you are going to file.

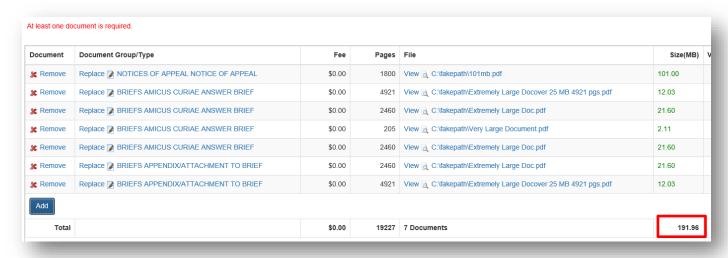
If you use the search feature, type in the most uncommon word in the title of your document and then use your **Tab OR Enter** key to perform the search. In the below example, we will use the word 'Petition' to limit the result set of our search.



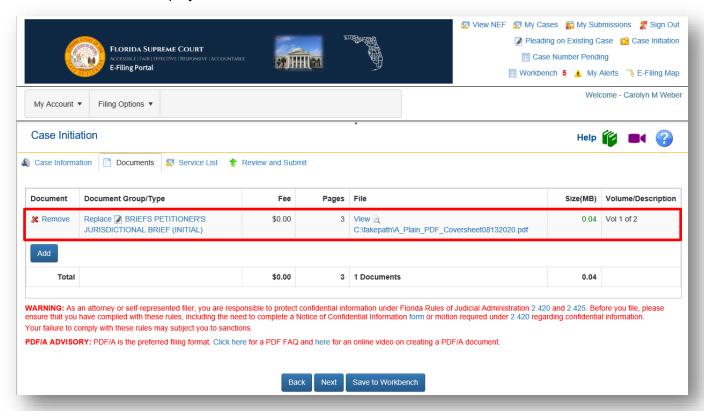
Select the document you wish to file and upload the document. You may also use the Volume field to further identify the document you are submitting. If your document is larger than 200 MB, break your document down into separate files and then submit them individually using the additional text Volume field to identify the volumes. Then click on **Save** to add it to the list of documents you will submit.



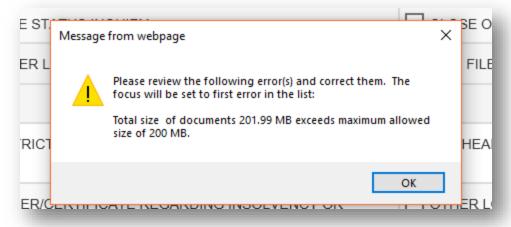
Your document will appear on the Documents page with the file size shown in the far-right hand column. You may upload as many documents as you need to file with the total file size not to exceed 200 MB.



The documents will be displayed in the list.



The **Document** page also allows the filer to **Replace** or **Remove** a document. Clicking **Add** again allows the filer to add another document to the case. The size of the document added also appears, so the filer knows when they are approaching the submission size maximum of 200 MB. When the size appears in the size column, your document has completely uploaded, and you may continue. The maximum submission size is 200 MB. If you attach too many documents to the submission, and it exceeds the 200 MB size limit, an error message will appear as shown below.



To file documents that are larger than 200 MB, break the document down into separate files and submit them individually.

## **Portal Filer User Manual**

When the filer has completed adding or editing all necessary document information, be sure to note the Confidential Warning section. For confidential documents, the filer must attach the Notice of Confidential Information within Court Filing or a Motion to Determine Confidentiality as per Rule 2.420. Then click the **Next** button to move on.

### **ServiceList**

As the filer, you will automatically be added to the E-service list for this case. The E-service email addresses added will default to your profile email addresses. Anyone else that files electronically to this case from this point on will also be added and appear in the E-service list.

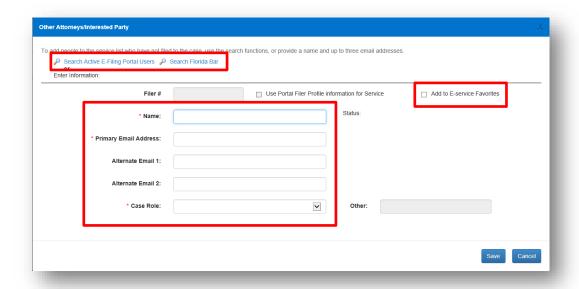
### **Adding Parties to the E-service List**

To add a person to the E-service list for a case, from the My Added Attorney/Interested Parties tab there are now two ways to do so.

### **Add Other Attorney/Interested Party**

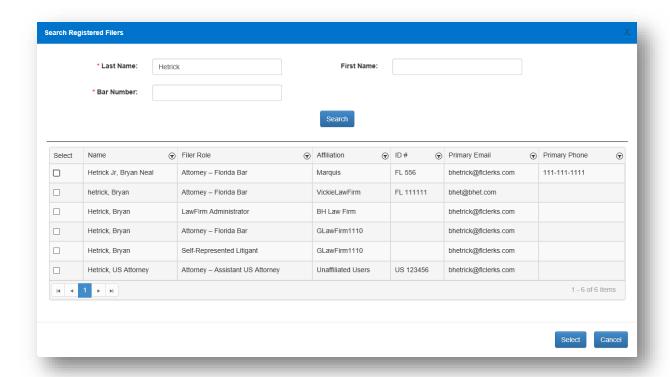
When you select **Add Other Attorney/Interested Party**, you will be able to add E-service recipients to this case four different ways:

- 1. Search Active E-Filing Portal Users
- 2. Search Florida Bar
- 3. Free Text
- 4. Add from E-service Favorites List

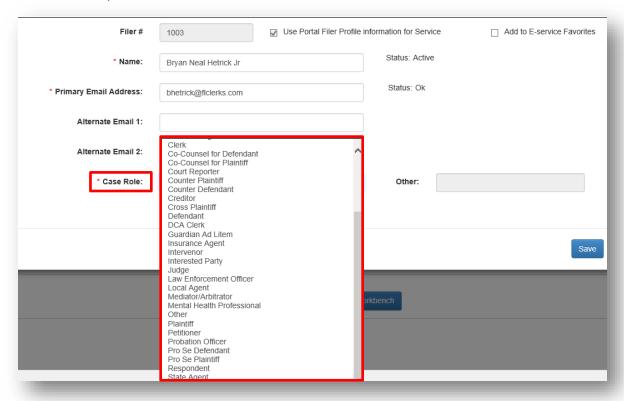


#### Search Active Portal Users

When you select this link, type in the Last Name or the Bar Number of the person you are searching for to add to this E-service list and then select **Search**.

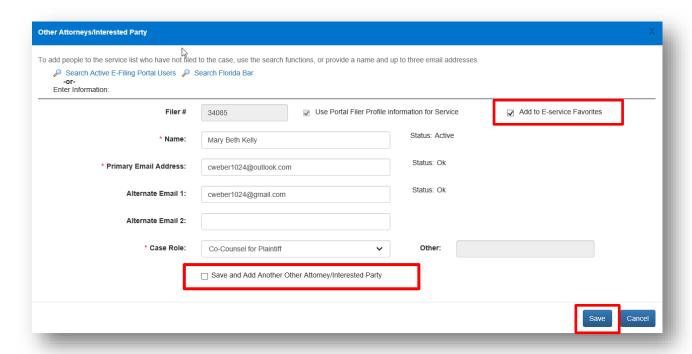


Place a check in the appropriate box and click on **Select**. Then select the **Case Role** that this person fulfills from the drop-down.



If this person is someone that you frequently add to E-service lists, you may now select to add this person to your E-service favorites list. To do so, place a check in the box next to **Add to E-service** 

**Favorites** in the upper right-hand corner of the screen. If you need to add another Attorney/Interested Party, click on the box at the bottom of the screen and then click on **Save**.

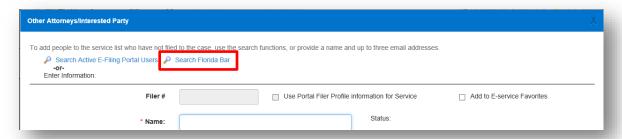


That will add this person to the E-service list for this specific case as well as add this person to your E-service favorites list so that the next time you need to add this person to a case, you can select **Add from E-service Favorites** which will show all of your E-service recipients that you have saved to your Favorites list for quick and easy adding to an E-service list. The screen will reappear so you can now add another Attorney or interested party.

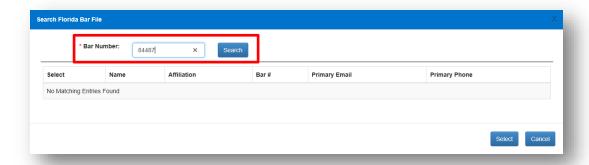
To remove participants from your E-service favorites go to the **My Account** menu, **My Profile** and select the **E-service Favorites** tab. For more information on removing people from your E-service favorites list, please see **Portal Navigation** located in the beginning of this User Manual.

#### Search Florida Bar

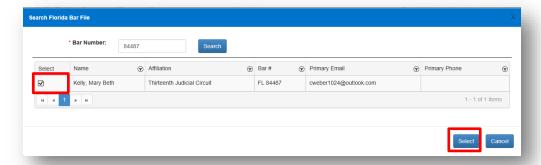
Click on the Search Florida Bar link.



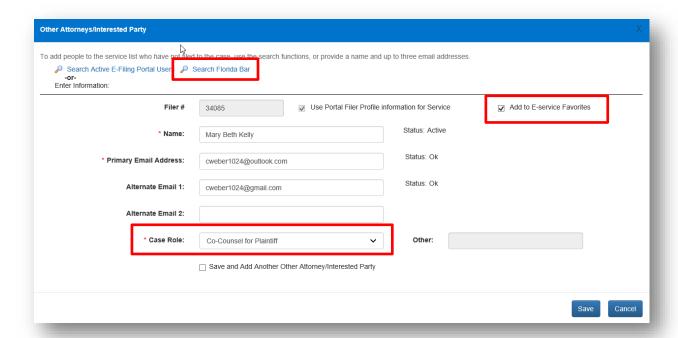
Type in The Florida Bar number of the person you are adding to the E-service recipient list and click on **Search.** 



That will pull up the attorney with that Florida Bar number. Place a check in the **Select** box and then click on **Select**.



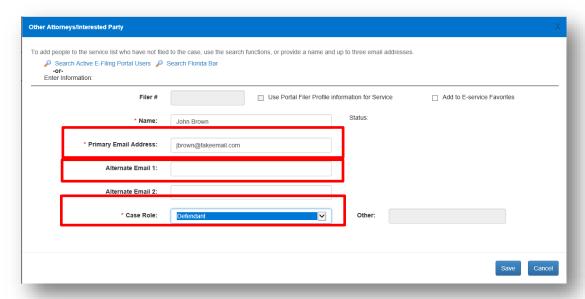
That will add this person as an Other Attorney/Interested Party to this E-service list. If you want to add them to your E-service favorites list place a check in the appropriate box. Be sure to select the **Case Role** of this E-service recipient and then click on **Save.** 



This Florida Bar Attorney has now been added to the E-service list for this case as well as to your E-service favorites list.

#### Free Text the Information

Type in the information into the appropriate required fields. Then click on **Save** to add this person to the E-service list for this case.

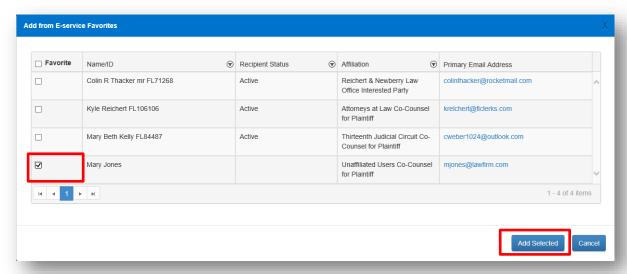


They are added to the Electronic Service recipients list for this case.

#### Add from E-service Favorites

From the **My Added Attorney/Interested Parties** tab, click on **Add from E-service Favorites**. That will pull up your E-service favorites list that you have been creating as you add E-service participants to E-service lists in your cases. To manage this list (remove names) please see the **Portal Navigation** section of this User Manual.

Select the name of the person you wish to add to this E-service list from your E-service favorites list by placing a check in the **Favorite** column next to the name. Then click on **Add Selected**.

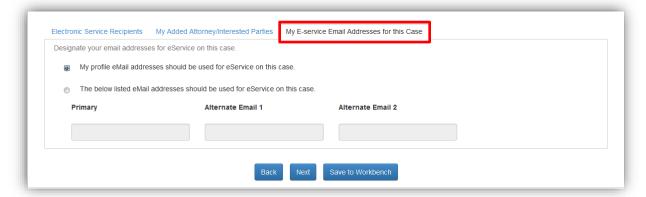


# **Portal Filer User Manual**

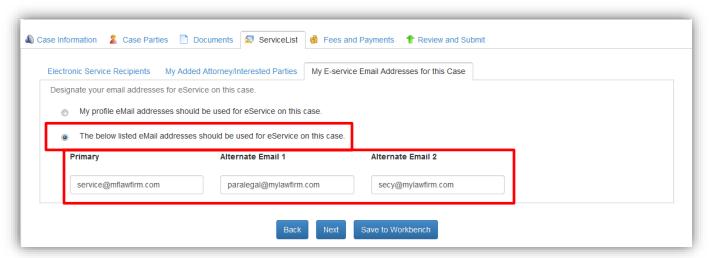
The person you selected from your E-service favorites list will be added to the E-service list for this case.

### My E-service Email Addresses for this Case

You may also designate E-service email addresses for this specific case if you wish to use email addresses that are different from your Profile email addresses. To do this, select the **My E-service Email Addresses for this Case** link.

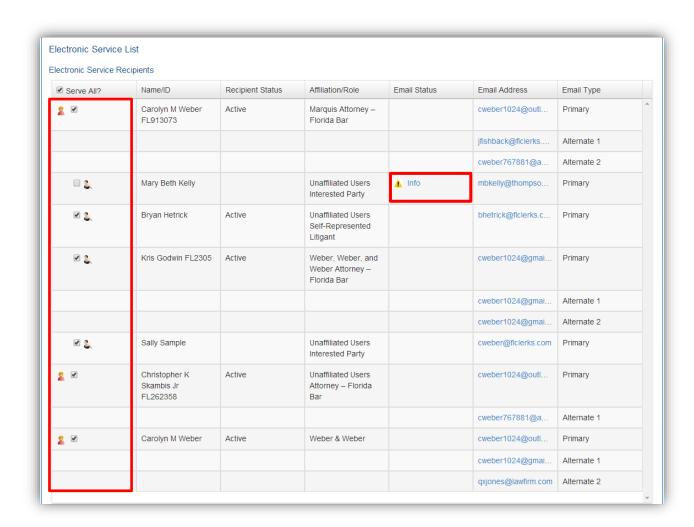


Then select the appropriate designation and if selecting new E-service email addresses to be used for this one case only, type in the new email addresses and then click on **Next**.



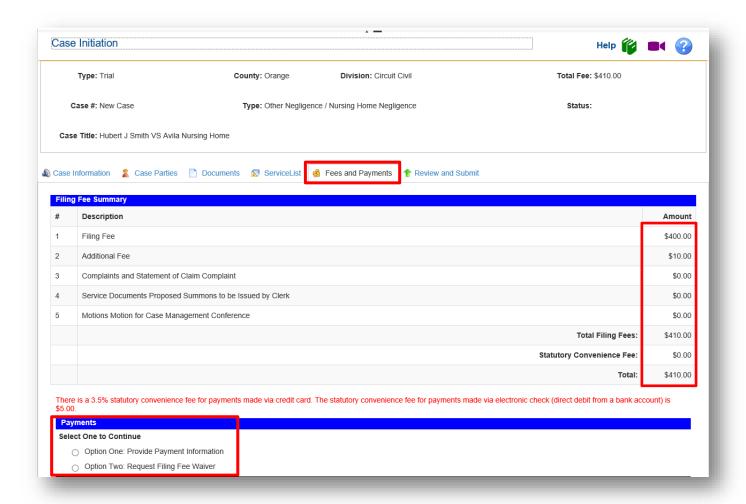
A valid E-service list will have a check in the box next to the name of the people you wish to serve as is shown below. By selecting the person you wish to serve, all email addresses linked to that person will receive service of the documents filed in this case.

NOTE: Do not serve an email address that has received a bounce back until the problem with that email address has been corrected.



# Fees and Payments - Trial Court

The filer is directed to the **Fees and Payments** page. There are two payment options: pay with a credit card or a check or fee waiver. Enter *only* one form of payment.

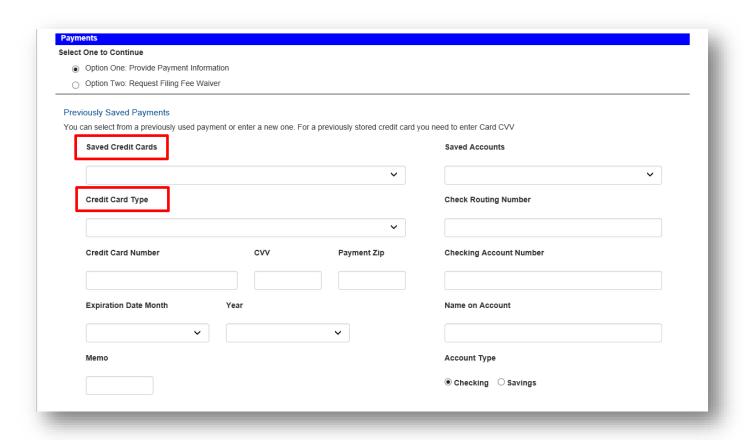


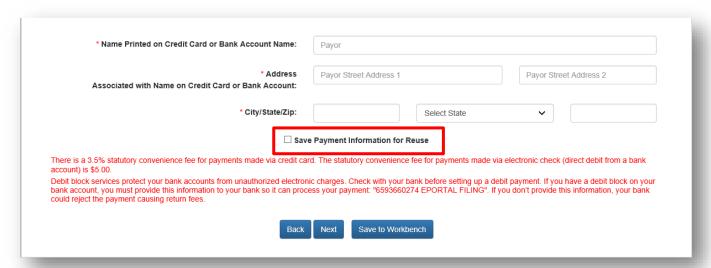
A breakdown of the filing fees is listed in the Filing Fee Summary portion of the page.

The filer may elect to use a credit card or e-check. Only one payment method is allowed per submission. Once the filer enters their payment information, the payment information may be stored for future use by checking the **Save Payment Information for Reuse** box. Complete all required information. The required information is marked with a red asterisk (\*).

If you have already saved a payment method, select the Saved Credit Cards/Saved Accounts drop-down and select one from the list. The information should auto-populate the required fields.

If you are entering a new payment method, complete the required fields under Credit Card Type and select **Save Payment Information for Reuse** to be able to select the newly added payment method from the drop-down menu.

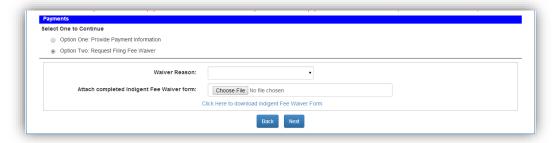




The Portal accepts the following credit cards for payment:

- American Express
- Discover
- MasterCard
- Visa
- ACH Account

The filer may request a Waiver of the fees by selecting option two and completing the **Waiver Reason** and attach the Fee Waiver form.



**Note**: An explanation of how the convenience fee is calculated and about Debit block services is provided in red text below the fee total.

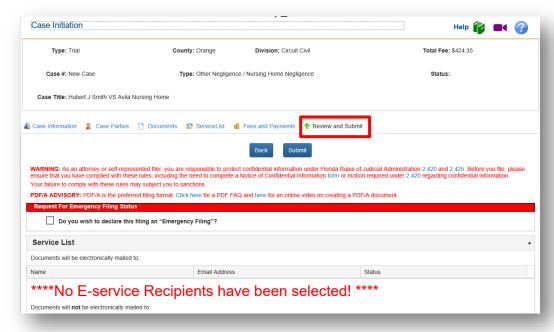
What is C.V.V.? It is a 3 to 4 digit code found on the back of the credit card.

The Payment Zip Code is the zip code for the billing address 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 page, the credit card or check routing information is validated and completed by the appropriate institution. If the submission is returned to the Correction Queue, a refund is made back to the filer. Once the submission is corrected and resubmitted, another fee payment will be required.

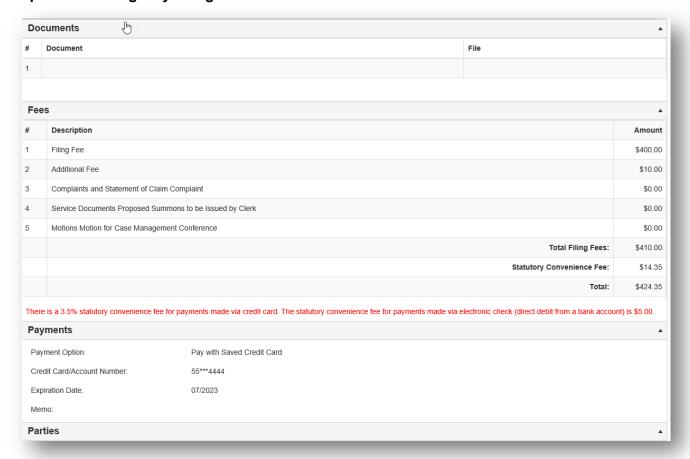
#### Review and Submit - Trial Court

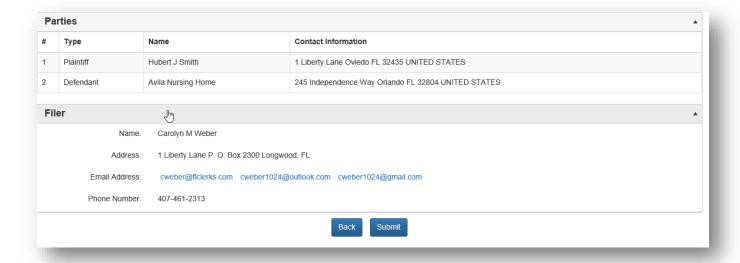
**Review and Submit** all information carefully, clicking **Submit** is FINAL. If there are any edits or changes that need to be made, the filer must click back to the **Case Information**, **Case Parties**, **Documents**, **ServiceList** and/or **Fees and Payments** tab(s) to make the changes and re-save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



If no one has been selected for E-service on the **ServiceList** page, you will see an alert in the **ServiceList** section of the **Review and Submit** page. To correct, click on the **ServiceList** tab and make your service selections.

Next you see the **Documents** uploaded, **Fees**, **Payments**, **Parties** [if any are added], **Filer** and **Request for Emergency Filing Status** information as shown below.

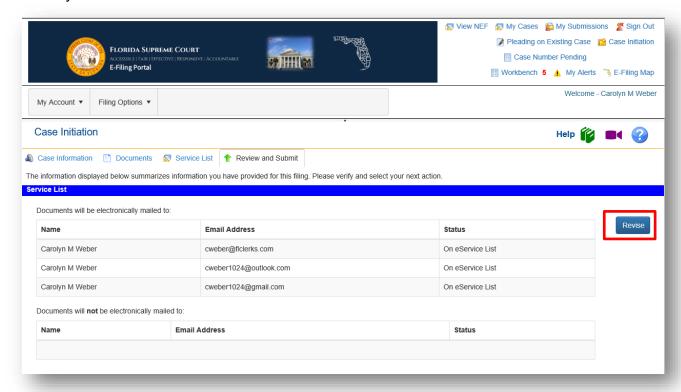


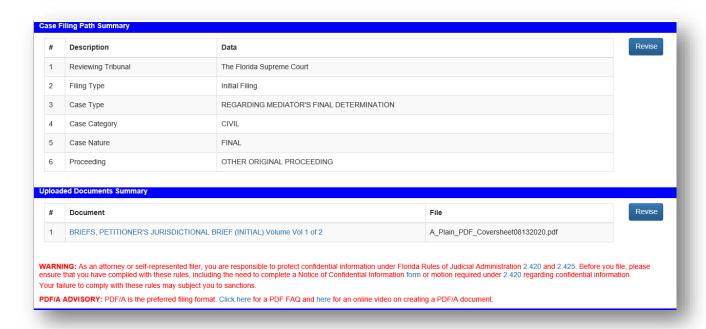


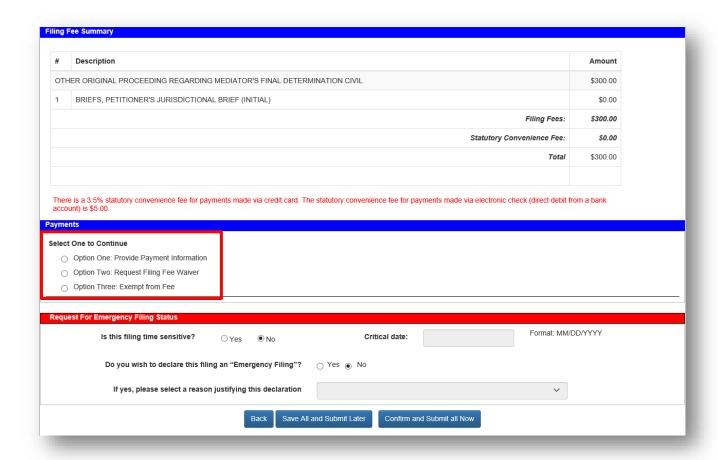
If the filer has failed to enter required information, they will receive a pop-up message notifying what information is missing.

# **Review and Submit – Appellate Court**

**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 **Revise** to go back to the page and make any corrections necessary.





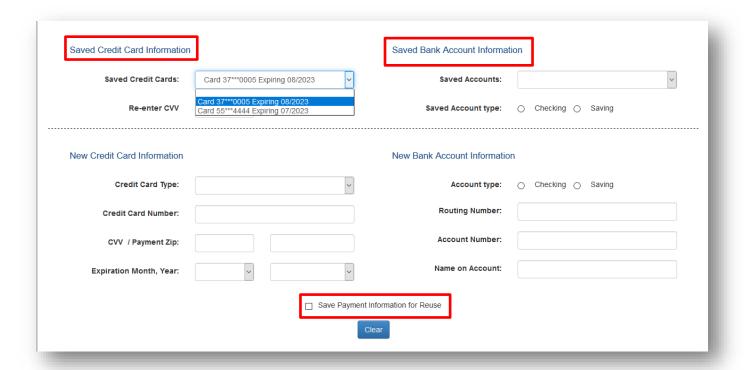


Since there is a statutory fee due, the filer must select a payment method. Select one of the Options in the **Payments** section of the above page and provide the payment information.

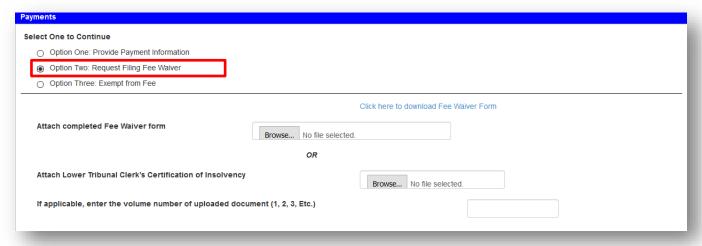
## **Option One: Provide Payment Information**



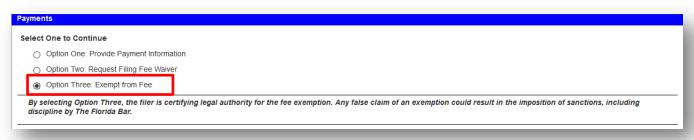
You may pay using either a Credit Card or a Debit Card. Complete the information requested based on your method of payment. If you wish to **Save Payment Information for Reuse**, be sure to place a check in the box next to that statement right above the **Clear** button.



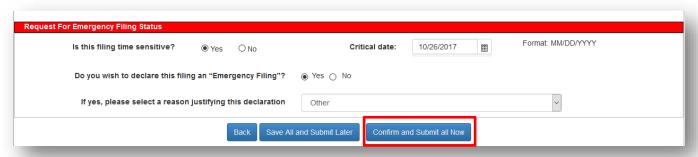
# Option Two: Request Filing Fee Waiver



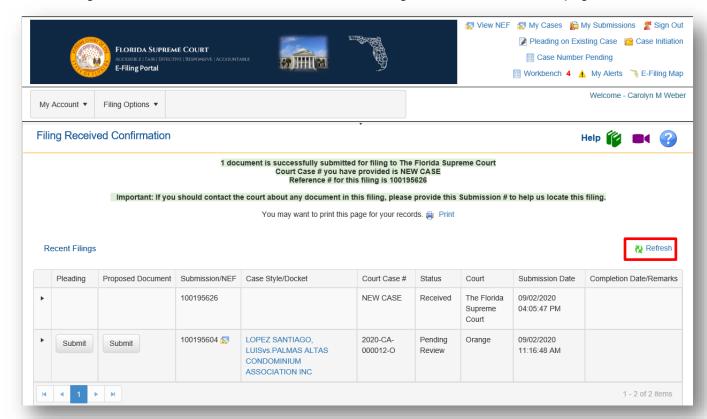
## Option Three: Exempt from Fee



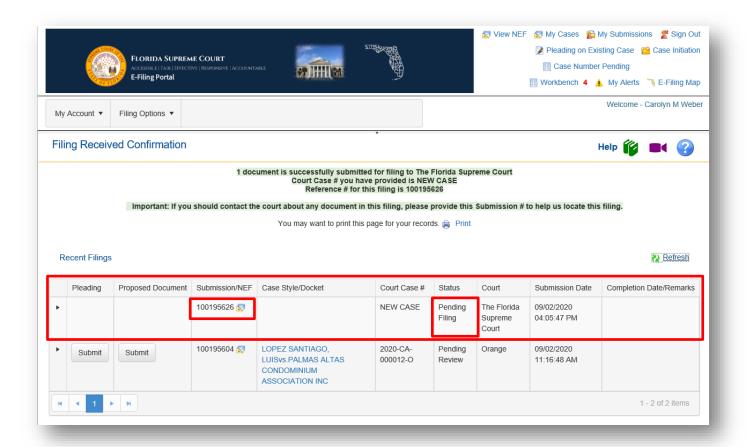
Once you have submitted your Payment Method, **Request for Emergency Filing Status** is available if necessary. Complete the required information. Then **Save All and Submit Later** which places this submission on the Workbench for submission later or **Confirm and Submit all Now** to file your new case immediately.



After the filing has been submitted, the filer will be at the Filing Received Confirmation page.



Click Refresh to watch the Status of your submission change to Pending Filing.



# **Confirmations of Filing**

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

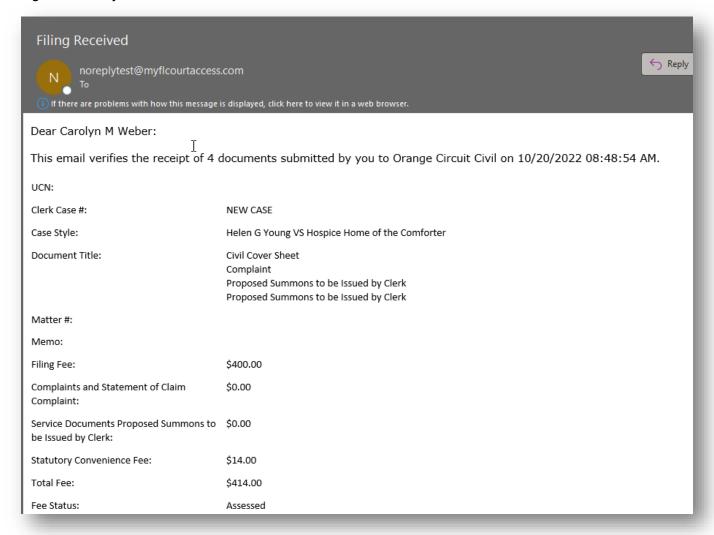
### 1. The Filing Received Confirmation page:

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.

#### 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 in the Portal.

Filing received by the Portal for a Trial Court new case submission:



Fee Status: Assessed

Paid By: Pay By Credit/Debit Card

Order #: 36888

Financial ID: 107142

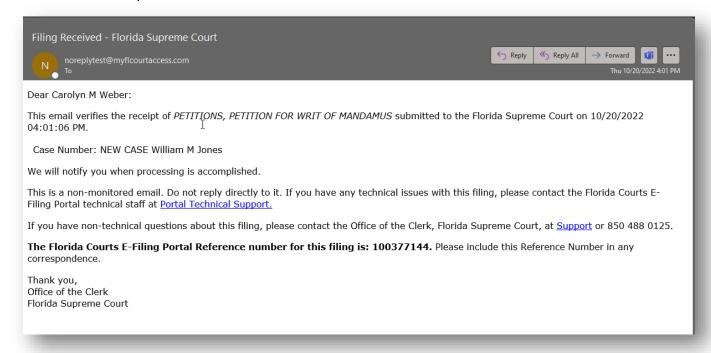
The E-Portal reference number of this filing is: 100377079. Please reference this Filing # in any correspondence.

You will receive a follow-up email when your filing has been docketed with the Clerk. You, as the filer are responsible for fee payment. If there are any issues with payment processing, you will be contacted by the Civitek Banking Department.

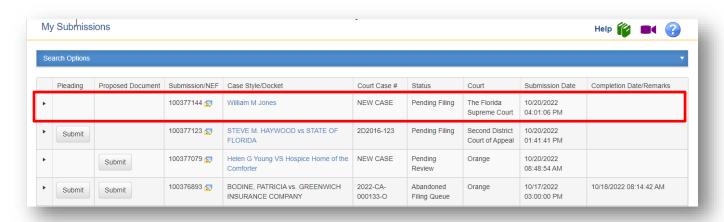
This is a non-monitored email. Do not reply directly to it. If you have any questions about this filing please contact the Orange Circuit Civil division.

Thank you,
The Florida Courts E-Filing Portal

From the Florida Supreme Court for a new case submission:

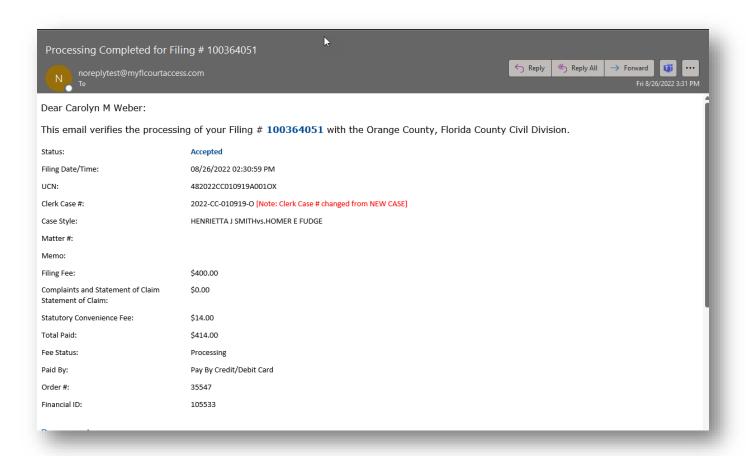


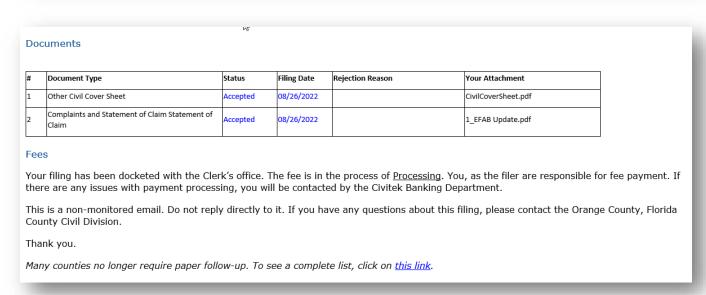
3. The new case submission is available in the **My Submissions** page and upon acceptance by the Clerk, the Court Case # will be available and the Completion Date will be populated.



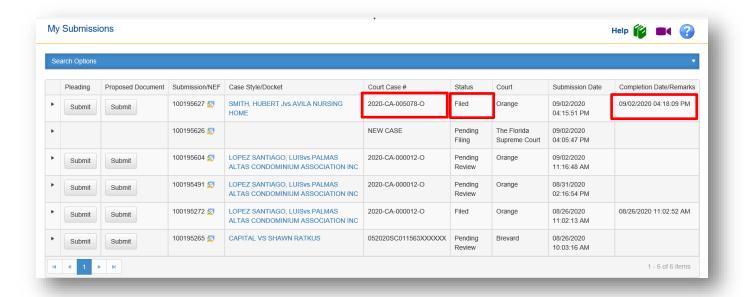
### **Processing Completed for Filing**

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



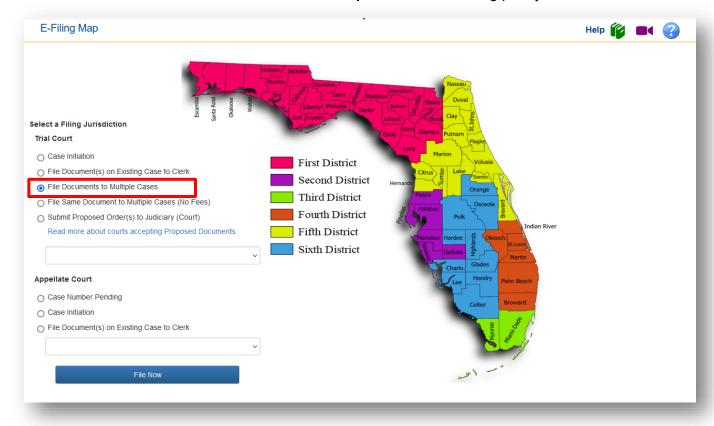


The document now appears in **My Submissions** with the **Completion Date** displayed.

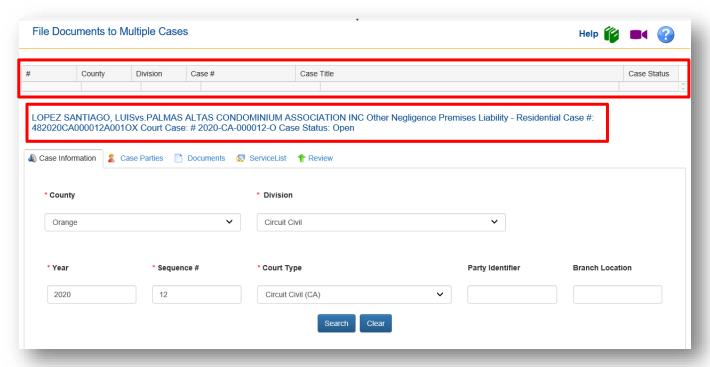


# **File Documents to Multiple Cases**

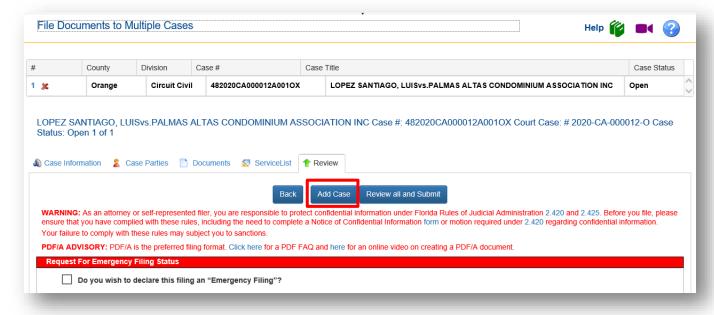
If you have prepared all the documents you need to file and wish to create each submission and then submit all at the same time, **File Documents to Multiple Cases** is the filing path you should select.



Go through the filing process for each case you are filing to. For Case Information, type in the Year and the Sequence # and select a Court Type then click on Search. You will see at the top of the screen the case information and the beginning of a table that will display the cases as you add them to this submission.



Next go to the **Case Parties** tab and select who you are filing on behalf of, then to the **Documents** tab and add the documents you are submitting to the above case. Next select your E-service recipients on the **E-service** tab and when you get to the **Review** tab, if you have more documents to submit to other cases, click on **Add Case**.

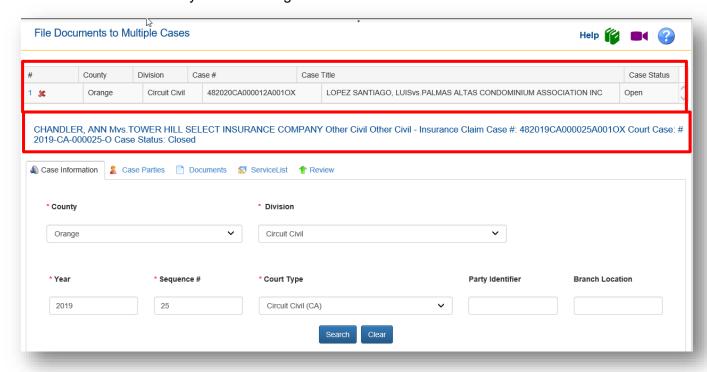


This will take you back to the **Case Information** tab where you can add another case to file document to. You can file to any county you need to in this submission. You do not have to file to the same

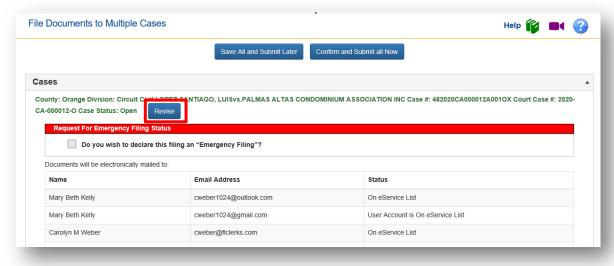
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county. When you enter the **Case Information** for the next case and click on **Search**, the Portal will populate the table at the top of the page with the first case you selected and display the case information of the next case you will be filing to as shown below.

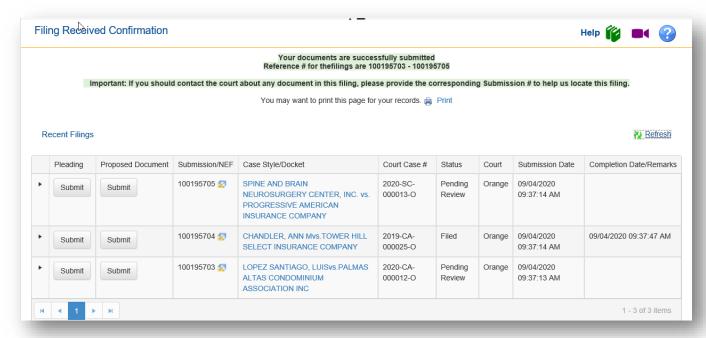


Now you go through the Menu tabs on the filing path to select whom you are filing on behalf of, add your document on the **Documents** tab, select your E-service recipients and when you get to the **Review** tab you can either **Add Case** or if you are ready to submit these documents click on **Review all and Submit**. When you are ready to submit these submissions the **Review** screen will display all the case information for each case you have entered in the table. If you wish to make a change to any of the submissions, there is a **Revise** button next to the case information. Select that Revise button to take you back into that submission to make any revisions necessary.

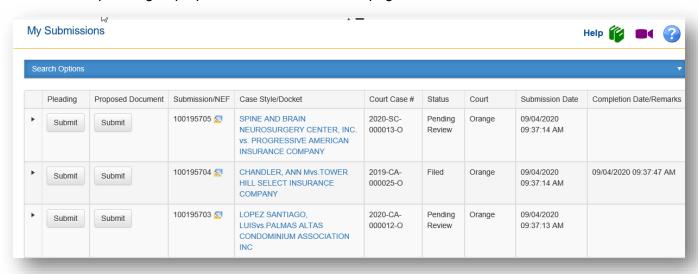


Once you are ready to send these submissions off, click on **Confirm and Submit all Now**. You can also save this entire submission to the Workbench by selecting **Save All and Submit Later**. The

**Filing Received Confirmation** page will show all three submissions individually. If any corrections need to be made to documents submitted, only that submission will be returned to the **Correction Queue**. Each submission will be handled individually even though you sent them all into the Portal in one submission. See below.

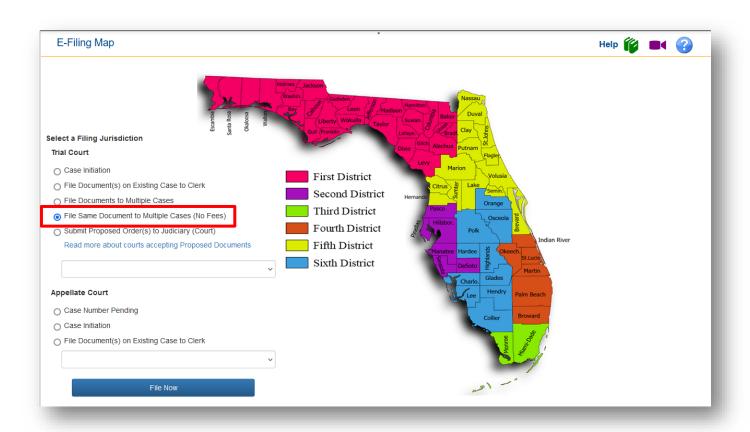


They will also appear on your **My Submission** page as individual submissions so you can select to submit another pleading or proposed document from this page as well.

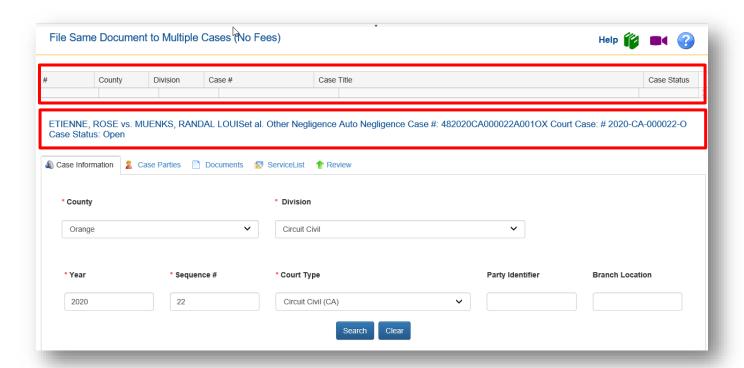


# File Same Document to Multiple Cases (No Fees)

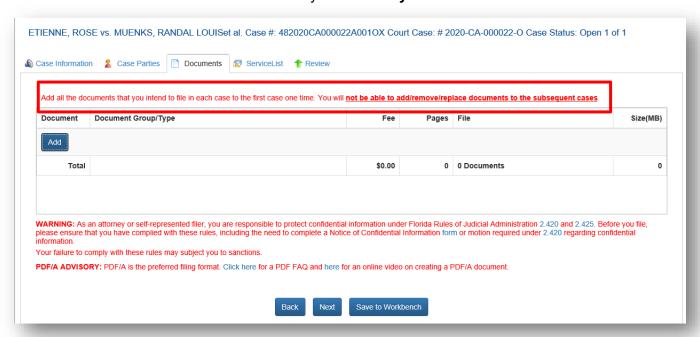
If you have the same document that you wish to file to multiple cases, and there are no fees required to submit this document, select **File Same Document to Multiple Cases (No Fees)**. An example of this type of document would be Notice of Unavailability.



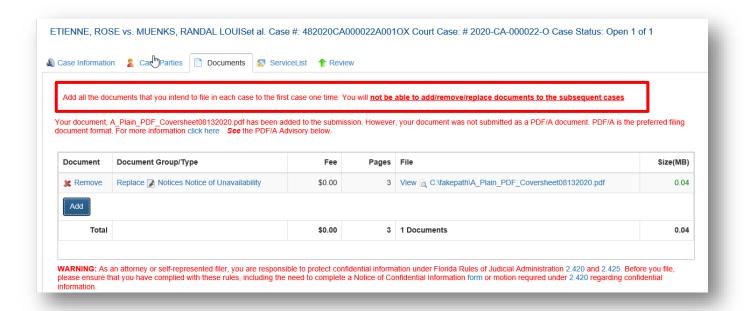
On the **Case Information** page select the **Division**, type in the **Year** and **Sequence #** and select the **Court Type** if necessary and click on **Search**. This will pull up the case information and display it at the top of the page along with creating the case table that you will create as you add more cases to this filing path.



Now go through the **Case Parties** tab to select who you are filing on behalf of, add your document(s) on the **Document** tab. As you can see below, you will only add your documents to this first case. As this filing path indicates, these documents will be added to each case you add. You will not be able to add or remove documents from the other cases you add. **Only from this first case**.



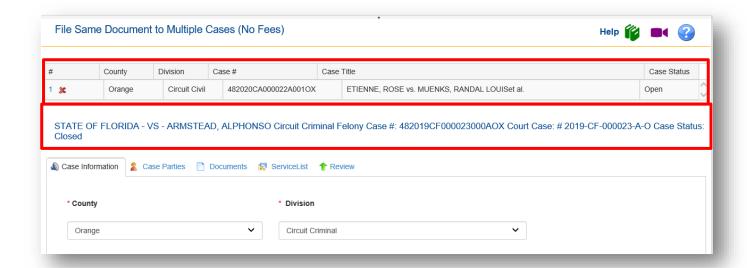
A Notice of Unavailability was added to the **Document** tab.



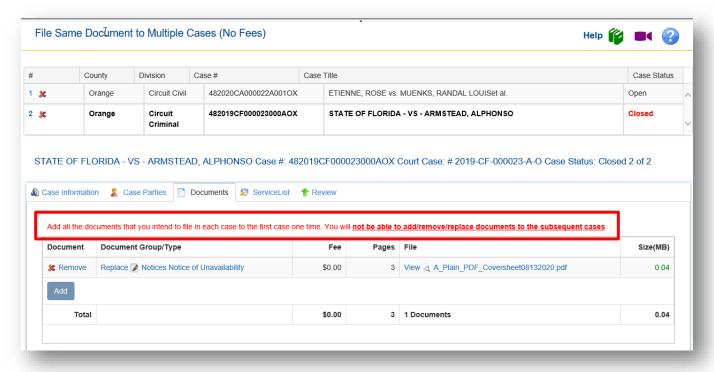
Next move on to the **Service** List tab and select your E-service recipients and then move to the **Review** tab. To add more cases to this submission, click **Add Case**.



Now you are ready to enter another case that you will submit the Notice of Unavailability to. Select a **Division**, type in the **Year** and **Sequence #** and select a **Court Type** if necessary. Then click on **Search**. This will create the table and list the first case you entered at the top of the page and display the case information of the second case you will be adding to this submission.

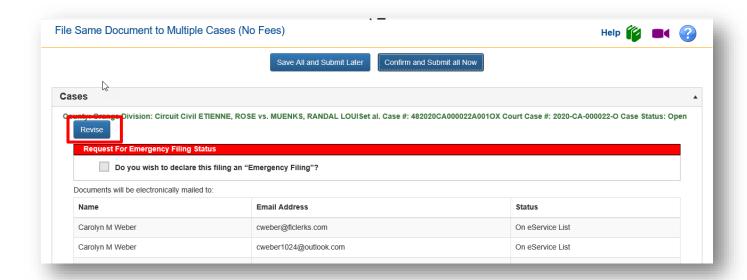


Select the party you are filing on behalf of from the **Case Parties** tab and when you move to the **Document** tab you will see that this tab is grayed out. You will not be able to add documents to this submission from any subsequent case added. **You must add all the documents you wish to submit to the first case you create.** Those documents will be sent to each additional case you add to this submission.

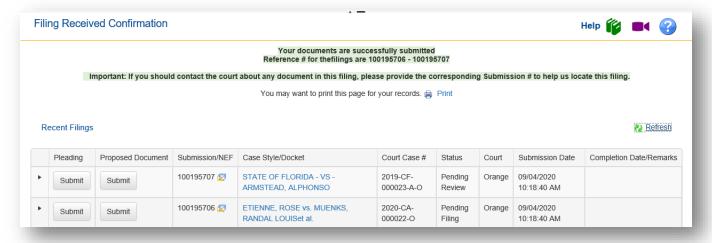


Move to the **Service List** tab and select your E-service recipients and finally to the **Review** tab where you can either add another case to this submission to receive the document(s) you have uploaded or review and submit. You can add as many cases to this table as you need to file to. Just remember that each case will receive the document(s) you add to the first case in the table.

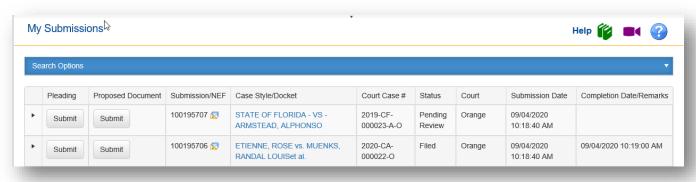
We will select **Review all and Submit**. You can now review your submission and make any changes necessary by selecting **Revise** next to the case information in which you need to make a change.



Once you have verified that all information is correct, you click on **Confirm and Submit all Now** and that will take you to the **Filing Received Confirmation** page. Each submission will be listed individually.



It will appear on your My Submissions page individually as well.

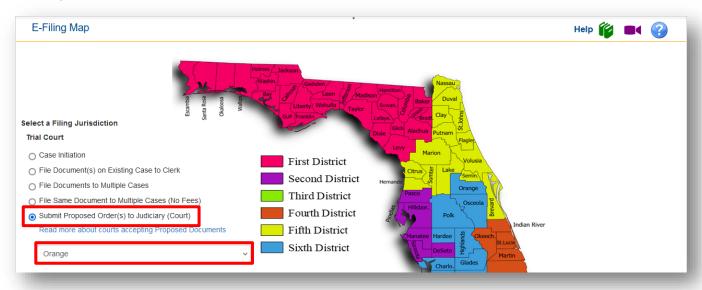


# **Submit Proposed Order(s) to Judiciary (Court)**

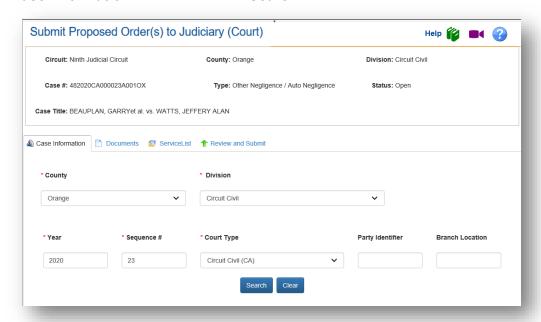
We have expanded this filing path to include documents other than proposed orders. Proposed orders will still be submitted using this filing path, but each circuit will now be able to add other documents they wish to receive using this filing path.

Documents for Judicial Review will bypass the Clerk and will go to the Judicial Circuit. They will not be filed into the official court file unless submitted to the Clerk.

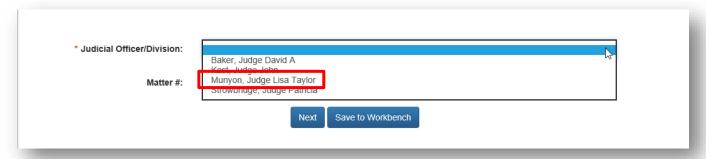
To submit your proposed document, click on the **Proposed Documents to Judiciary** filing path, select the county and then **File Now**.



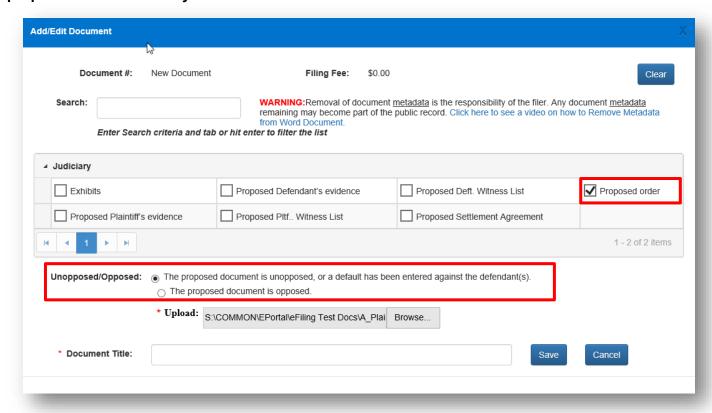
Enter the Case Information and then click on Search.



Complete the case information screen click on **Search**. Then you need to click on the **Judicial Officer/Division** drop-down and select what applies.



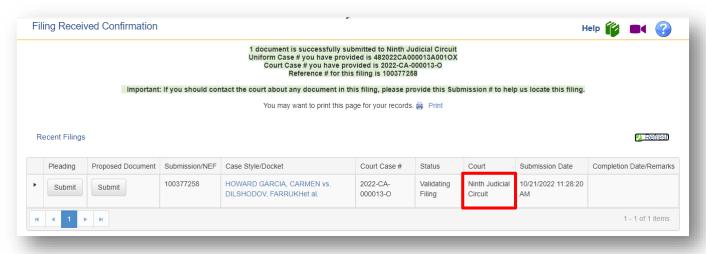
Next, on the **Documents** tab click **Add**. This will bring up the **Add/Edit Document** page and the list of documents shown may vary circuit by circuit. An example is shown below. Proposed Order is an option and should be selected to submit a proposed order to the Judge. **Please Note: Not all circuits will allow the complete list of documents shown below. Each circuit may designate which proposed documents they wish to receive.** 



The **Document Title** field is a required field. Type in the name of the Order you are submitting as shown below. The click on **Save**.



Next move on to the **Service List** tab and select your E-service recipients, if any. Then move to **Review and Submit** and click on **Submit** to send your proposed order to the Judicial Circuit for the judicial officer to review. The **Filing Received Confirmation** page will show this submission has been sent to the Court.

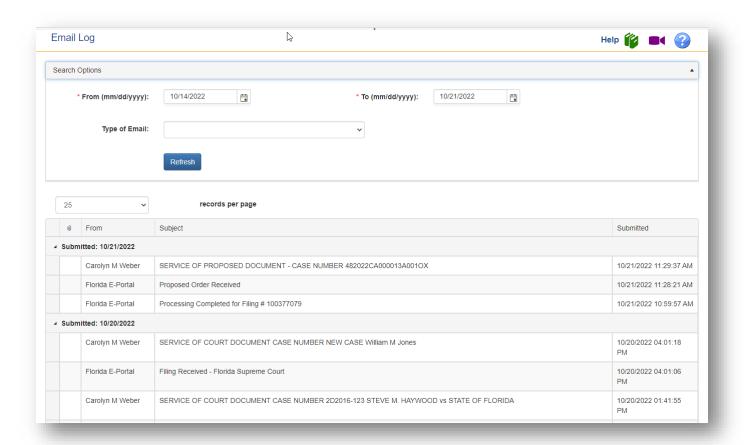


#### **Notifications**

The **Email Log** 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 Portal include:

- Initial notification of registration
- Notification to activate your account
- Notification of password change
- Notification of document moved to pending queue
- · Notification of processed filing
- Notification of Moved to Judicial Review
- Notification that you have been added to an E-Service list

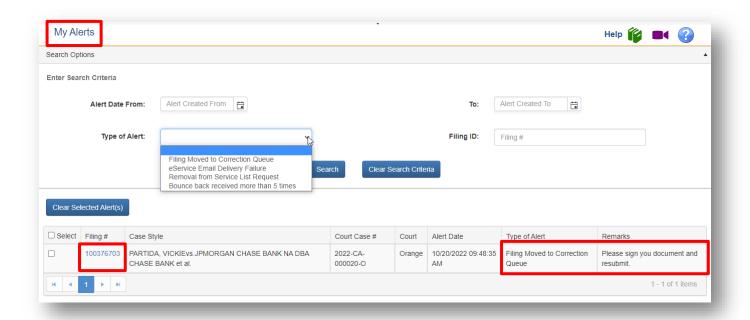


**Note**: If a filer deletes an email from their email client, the email remains in the Email Log for 90 days and the link to the document filed is available.

#### **Correction Queue**

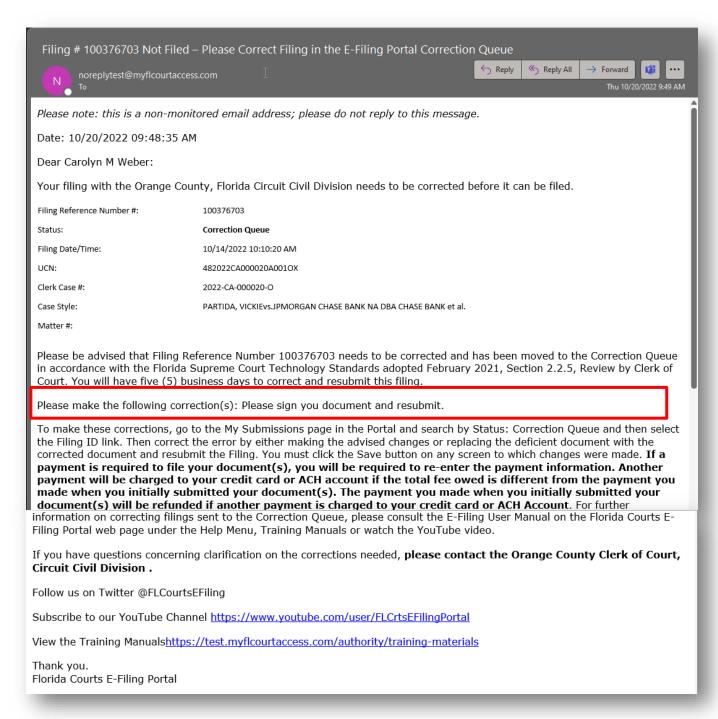
When filings require correction by the filer, they are moved to the **Correction Queue** by the Clerk's office. If a submission is returned to the Correction Queue, an **Alert** is automatically created in the Portal and when you log into the Portal, it will take you immediately to your **My Alerts** page. You may access the Correction Queue filing path by clicking on the **Filing** # link as shown below.

# **Portal Filer User Manual**



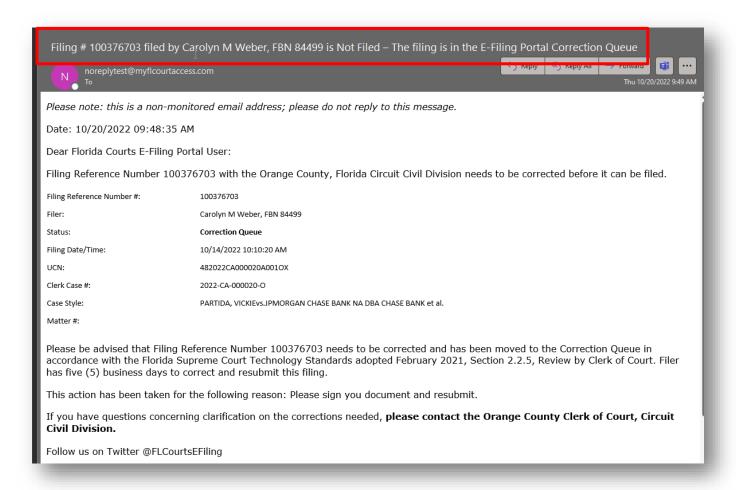
Remarks will be shown on **My Submissions** page and the filer is notified of the specific issue by email notification as well.

Email received:



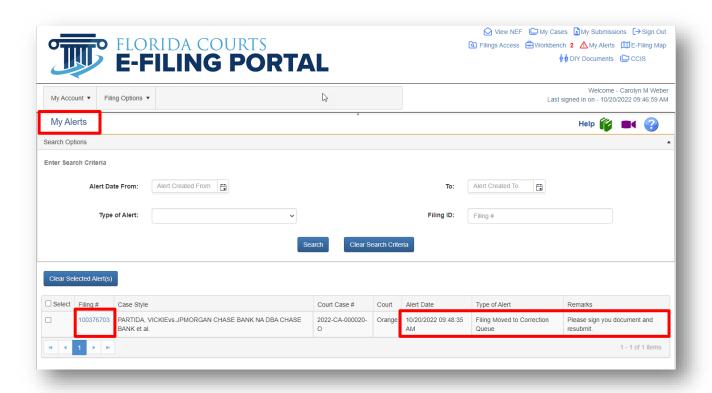
The Correction Queue email is sent to all the recipients on the E-service list.

Email to the E-service recipient list:



When the submission is corrected and resubmitted, another Notification of Electronic Filing (NEF) goes out to the E-service recipient list with a link to the document filed.

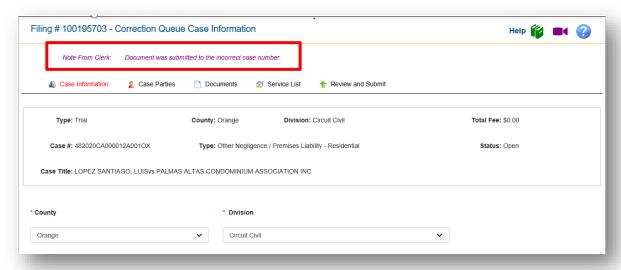
The reason why the submission was returned to the **Correction Queue** will also be displayed on the **My Alerts** page and on the **My Submissions** page under the **Completion Date/Remarks** column. A submission can be returned to the **Correction Queue** for a variety of reasons: document is corrupt, document is unsigned, wrong case number was selected, for case initiation wrong case type was selected, reopen fee is required, etc. The Clerk will explain the problem so that you are aware of what needs to be corrected so that you can make those changes and resubmit the document.



It will also be available in the My submissions page.



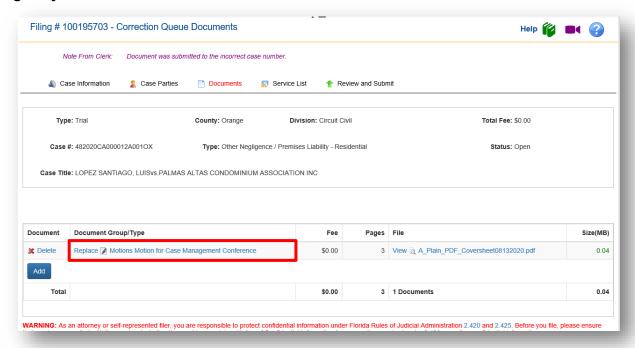
The filer will see the Filing # is hyperlinked as shown above. Click the Filing # link to open the filing and make corrections. All filings sent to the **Correction Queue** must be corrected by the filer and resubmitted to the Clerk's office within five (5) business days as specified in AO-09-30. The **Note From Clerk** is also displayed advising of the document deficiency.



### **Portal Time Stamp on Resubmitted Documents**

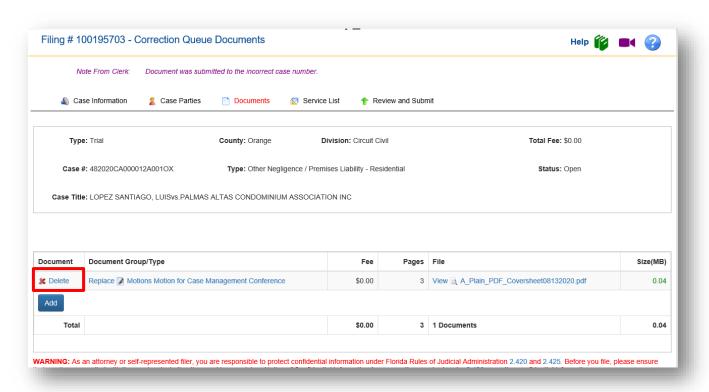
If there is an issue with the document and you **delete** or **add** documents to the submission, you will receive a new file stamp date and time for the filing.

If you *replace* the document, the official file stamp date and time will **remain the same as when originally submitted**.



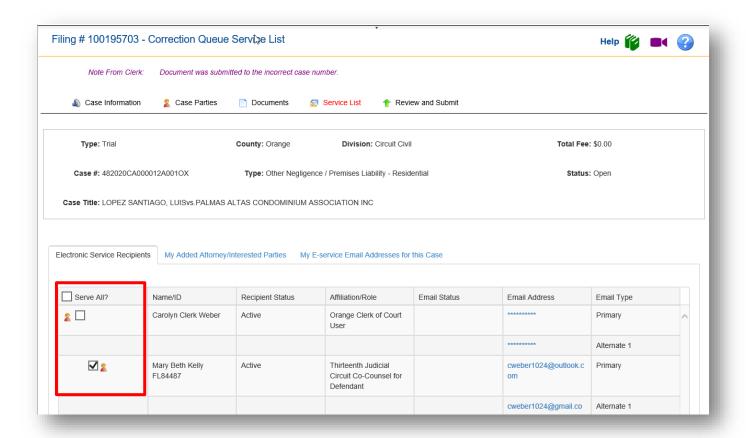
#### **Portal Filer User Manual**

If you delete the document and add a new document, the official file stamp date and time will be the current date.



# **E-service Page**

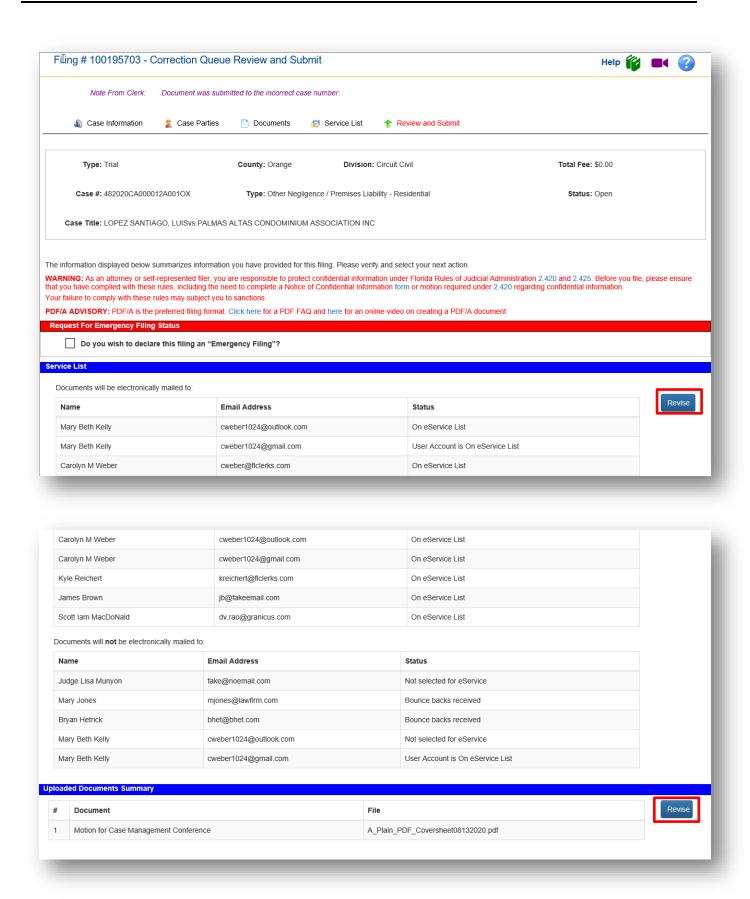
Next you come to the **ServiceList** page. Any attorney that has electronically filed at least one document to the case is automatically added to the E-service recipient list. To provide service of the documents you are filing, select the names from the E-service list. If you do not wish to serve a person listed in the Electronic Service recipient list, do not check that name. To select the entire list, place a check in the box next to 'Serve All?' in the column header.



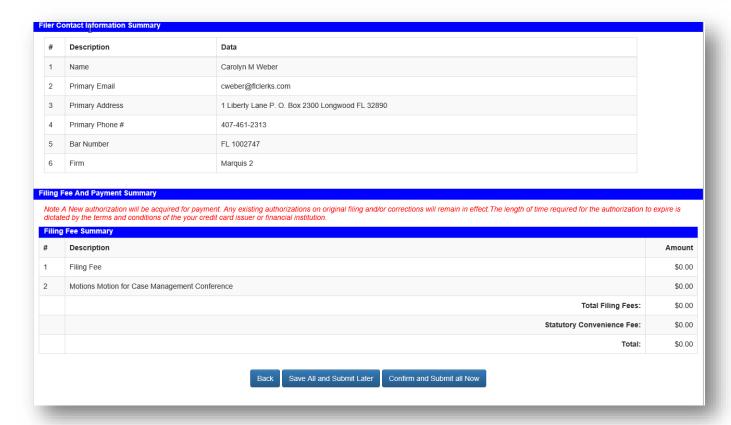
#### **Review and Submit**

After the **ServiceList** page you will come to the **Review and Submit** page. If your filing is a new case, you will have to resubmit your payment. When your submission was sent to the **Correction Queue**, your payment was immediately refunded. When you resubmit the corrected new case, you will have to provide a new payment.

After the document has been updated and is ready to be resubmitted, check your filing on the review and submit page. To make any corrections, click on the **Revise** button which will take you to the corresponding page where you can make the necessary corrections.







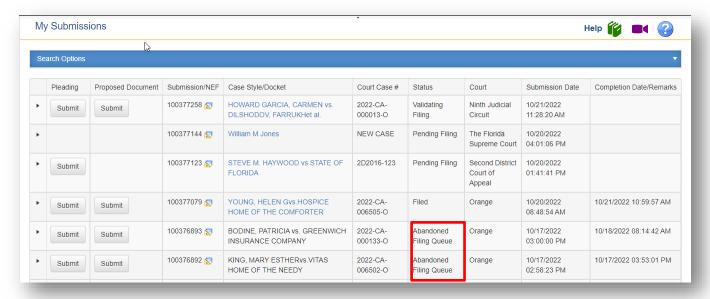
If there is a payment of statutory fees required, select a **Payment Option** as shown below.



You may save your work on your corrected filing by selecting **Select All and Submit Later**. When you are ready to submit, go to your My Submissions page and select the filing ID. The status will remain **Correction Queue** until it is resubmitted, or the Clerk moves it to the **Abandoned Filing Queue**.

## **Abandoned Filing Queue**

If a document that has been moved to the **Correction Queue** has not been corrected within five (5) business days, the county can move the filing to the **Abandoned Filing Queue**. Once a document has been moved to **Abandon Filing** status, no updates/corrections can be made to that submission on the Portal by the filer. It is deemed to have been abandoned and unable to be filed into the official court record.



## **Open Multiple Portal Sessions**

When opening multiple sessions of the Portal **do not** 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

#### **Documents Standards**

The following guidelines as defined in Rules of Judicial Administration 2.520 should be followed in preparing documents that will be attached to Portal filings:

- Document should be legibly typewritten or printed on only one side of letter sized (8 ½ by 11 inch) paper
- Documents should have one-inch margins on all sides and on all pages and pages should be numbered consecutively
- Reduction of legal-size (8 ½ by 14 inches) documents to letter size (8 ½ by 12 inches) is **prohibited**
- Documents shall be filed in a format capable of being electronically searched and printed
- PDF/A is the official and required format for documents submitted to the Portal
- Documents that are to be recorded in the public records of any county shall leave a 3-inch by 3-inch space at the top right-hand corner of the first page and a 1-inch by 3-inch space at the top right-hand corner on each subsequent page blank and reserved for use by the clerk of court
- At all times possible documents should be electronically signed as defined in AO09-30,
   Standards for Electronic Access to the Courts
- Black and white, non-color documents should be filed
- OCR scanned documents should be at a resolution of 300 DPI as defined in the State of Florida Electronic Records and Records Management Practices
- Multiple pleadings, motions, etc., should not be combined into one single file, but rather each individual document should be uploaded via the Portal document submission process
- Deviation from these guidelines may result in the submitted filing being moved to the Correction
  Queue by the Clerk with the filer and the E-service list being notified via email and requested to
  correct the issue(s) with the document(s) and resubmit the filing