

FLORIDA COURTS E-FILING AUTHORITY

DIY FUNCTIONALITY POLICY revised

Effective Date: October 15, 2020

I. PURPOSE

The purpose of the Do It Yourself (“DIY”) Functionality Policy is to state the process to be followed when DIY Florida interviews are requested to be implemented into the Florida Courts E-Filing Portal (“Portal”) A2J system governed by the Florida Courts E-Filing Authority. This process will help to ensure proper oversight by the E-Filing Authority Board (“Authority Board”) in the prioritization of projects and assignment of limited contractual resources.

II. PROCESS

A. New Interview Template Requests

All DIY Florida interview requests submitted after the date of this policy to place Florida Supreme Court-approved DIY Florida interviews within the A2J system of the Portal shall be sent to the E-Filing Authority Administrator (“Administrator”) at the Florida Court Clerks & Comptrollers Association (“FCCC”) for initial review. The Administrator shall notify the Authority Board by e-mail within five business days of the receipt of any such request.

B. Professional Analysis

The Administrator shall forward the request to the FCCC Director of Project Management who shall prepare a professional analysis in consultation with the FCCC Director of Information Technology, or their designee. The summary shall include, but is not limited to, fiscal estimates and time estimates based on the schedule of releases for the year. The professional analysis shall be completed within 30 days of submission of the request referenced in A. above. The Administrator shall notify the Authority Board by e-mail within five business days of the completion of the professional analysis and attach a copy of same.

C. Authority Board of Directors Approval

The Authority Board of Directors shall determine the schedule for the implementation of any new templates for DIY Florida interviews within 30 days of the receipt of the professional analysis. Upon Authority Board approval of the schedule, the FCCC Portal Project team is authorized to work in coordination with the Office of State Courts Administrator (“OSCA”) as shown in the attached workflow chart, attached as Exhibit A. The Administrator shall also notify the OSCA by

e-mail of the Authority Board's decision and estimated time to implement the request. The finalized, Florida Supreme Court-approved DIY Florida interviews must be submitted at least six (6) weeks before the next scheduled bi-annual release, which generally occur in April and October of each year. DIY Florida interviews submitted within this timeframe will be included in the next scheduled bi-annual release, unless otherwise approved to be released at an earlier time.

D. Roles and Responsibilities

Attached as EXHIBIT A is a workflow chart identifying each entity's responsibilities regarding the testing, programming and implementation of the DIY Florida interviews.

E. Notification

The Administrator shall notify the Authority Board and the OSCA at least five (5) business days before the DIY Florida interviews become live on the Portal.

III. PREVIOUSLY SUBMITTED INTERVIEWS

Any DIY Florida interviews submitted prior to the date of this policy shall be processed by the FCCC Portal Technical Team according to the workflow chart, attached as EXHIBIT A, and will be handled according to a priority order submitted by OSCA. Once the template interviews are made available for posting in the A2J system, and approved for posting by the Authority Board of Directors, the interview will be included in the next available release, bi-annual, maintenance, hot fix, or other.

The Administrator shall notify the Authority Board and the OSCA at least five (5) business days before the DIY Florida interviews become live on the Portal.

IV. FORM CONTENT

Neither FCCC nor the E-Filing Authority Board shall be responsible for the content or accuracy of the interactive interview forms.

The OSCA shall notify FCCC of Supreme Court-authorized revisions to the DIY Florida interview(s). Requests to correct or update forms must adhere to this policy.

V. ASSISTANCE TO USERS OF DIY FLORIDA INTERVIEW(S)

It is anticipated that self-represented litigants may need additional assistance and therefore, the DIY Florida interview(s) provide instruction on obtaining the needed assistance, through links to the FCCC Help Desk, The Florida Bar attorney directory, and the Florida Courts Self Help

webpages. Additionally, the Portal will include a window that directs individuals to the appropriate entity as follows:

- Technical questions will be directed to the Portal's Help Desk.
- Legal questions will result in suggesting that the caller contact an attorney.
- Substantive non-legal questions will result in suggesting the caller contact their local Self Service Center, with most located at their Clerk's office.

VI. EVALUATION AND REPORTING

For the first six months after any new request goes live, the Administrator shall compile and provide the following data analytics to the Authority Board of Directors and to OSCA through the monthly Portal and Service Desk status reports:

- Number and case types of pleadings created by the DIY Florida interview(s) filed through the Portal.
- Number of calls submitted through the Help Desk related to the DIY Florida interviews (categorized by type of incident).
- Data demonstrating the point at which those who do not complete the interviews discontinue the process, if technically available.
- Additional metrics may be added as data analytics become available.

DIY - Flow

September 18, 2020

