

PORTAL ORGANIZATION
ADMINISTRATOR USER MANUAL

Updated September 2020

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## Introduction

An organization administrator account is available on the Florida Courts E-Filing Portal to enable an organization to have staff administer Portal accounts and view submissions for the filers within their organization. An organization must be created by the county or the service desk. To request an organization account, contact your county and request an organization account. Let the county know the person you have designated to be your organization administrator who will be able to add users and manage the users' Portal accounts within your organization.

# **Obtaining an Administrator Account**

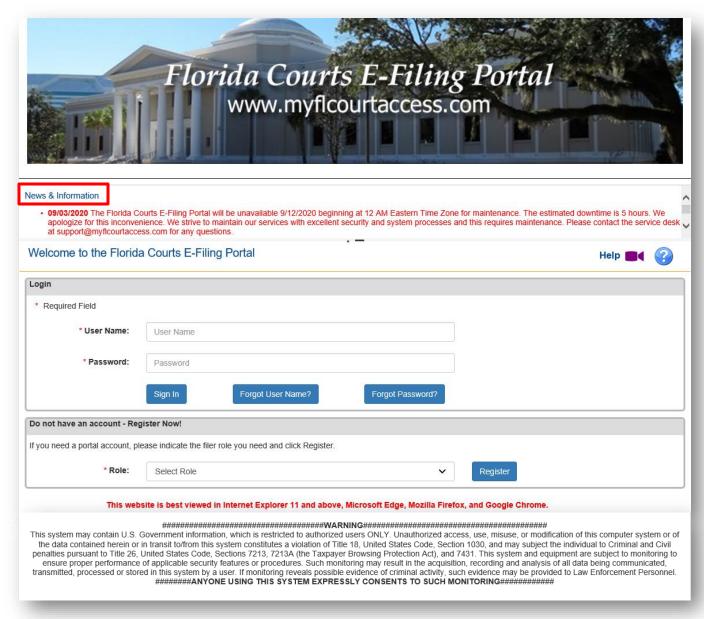
An organization account and organization administrator is created by the county in which you reside or the service desk. Make your request to the county and include the following information:

- Organization name required
- Primary email address you want listed for your organization required
- Up to two alternate email addresses may be specified as well
- Organization address
- Organization phone number
- A Portal user name that you would like to use when logging in to the portal
- Administrator's name
  - First required
  - o Middle
  - o Last required
  - Suffix
- Administrator's primary email address required
- Up to two additional alternate email addresses for the administrator
- · Administrator's work address
- Administrator's work phone number

The organization administrator security allows the user to update the organization's profile, reset the organization's user password, inactivate user accounts and add user accounts to the organization. An organization may consider having more than one administrator to cover leave time, self-audit and manage workload.

# Logging into the Portal

Administrators - You may contact the county or the service desk to request an organization administrator account. The new administrator must enter their user name and password and change the password after the initial login. Administrators can access the Portal login page by typing the following URL into their web browser: <a href="https://www.myflcourtaccess.com">www.myflcourtaccess.com</a>.



# **Organization Administrator**

When the administrator logs into the Portal, if there are not filer Alerts for anyone linked to the organization, they are presented with the E-Filing Map if that is what was selected to be their Home Page in the preferences. There are two tabs on the menu bar:

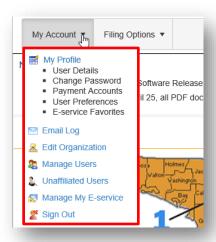
- My Account
- Filing Options



## My Account

Selecting the My Account option provides the user with Account Options:

- My Profile
  - User Details
  - Change Password
  - Payment Accounts
  - User Preferences
  - E-Service Favorites
- Email Log
- Edit Organization
- Manage Users
- Unaffiliated Users
- Manage My E-service
- Sign Out

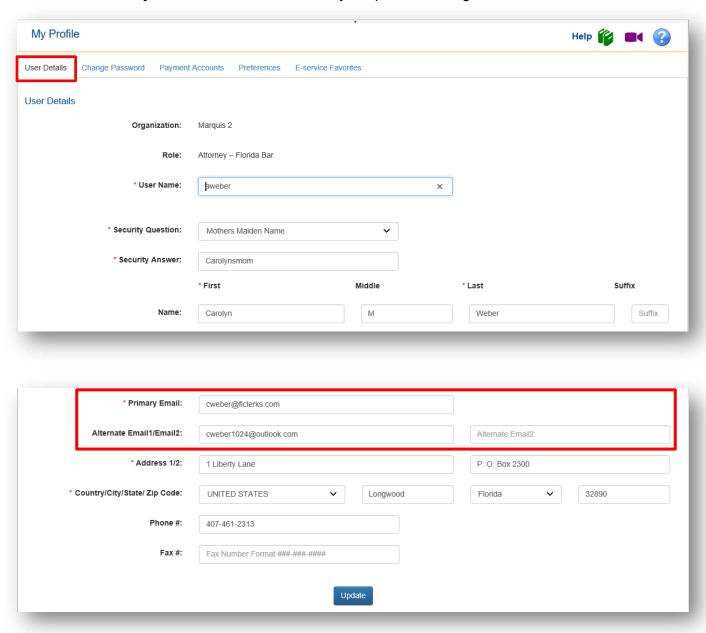


## My Profile

My Profile gives the user the ability to update their organization information, change the password, manage their saved payment accounts and select their preferences.

### **User Details**

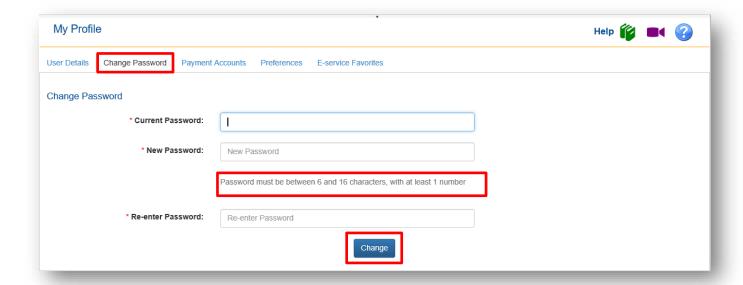
User Details, under My Profile, users have the ability to update their organization information.



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

### **Change Password**

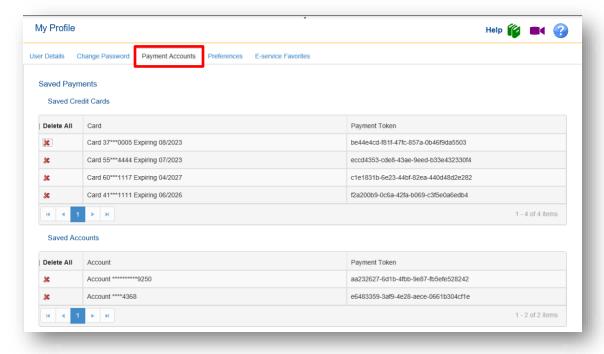
Change Password, under **My Profile**, provides users with the ability to manage/change their password. Users input their new password and select Change to update their account password.



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

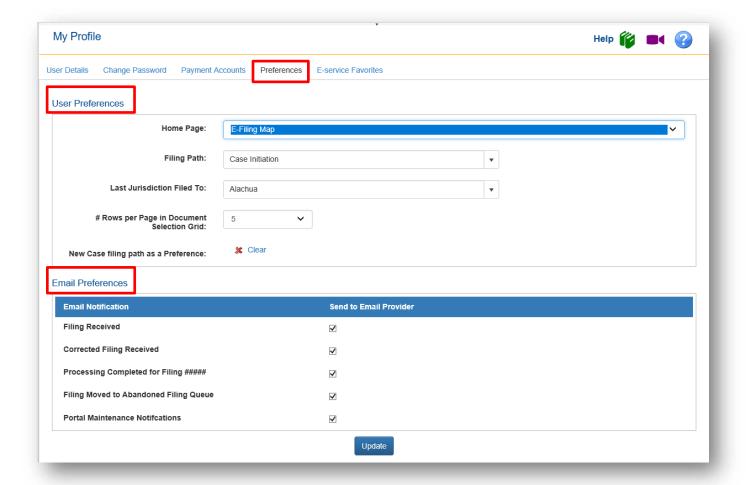
### **Payment Accounts**

Payment Accounts, under **My Profile**, gives the user the ability to manage their saved payment accounts. The user will only be able to remove any saved credit card or bank accounts.



### **Preferences**

As the Administrator of your Organization, you can select User Preferences and Email Preferences. To do so, go to **My Profile** and select the Preferences tab.



#### **User Preferences**

You may select the following user preferences from the drop downs:

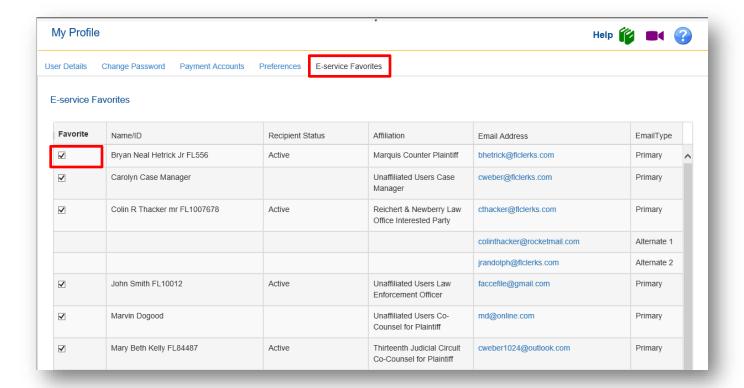
- Home Page [The My Alerts page will be the default if you have any Alerts pending. If there are no Alerts pending, the Portal will open to your designated Home Page.]
- > Filing Path
- Last Jurisdiction Filed To [This will automatically show the last county you filed to.]
- #Rows per Page in the Document Select Grid [on the Add Document page]

#### **Email Preferences**

Deselect the check in the box next to the Email Notification you do **NOT** wish to receive. Then click on **Update** to save your changes. There will be a notation in the Audit Trail of the submission when an Email Notification was supposed to be sent to the filer but was not sent due to a change in the Email Preferences. This can be changed by you at any time.

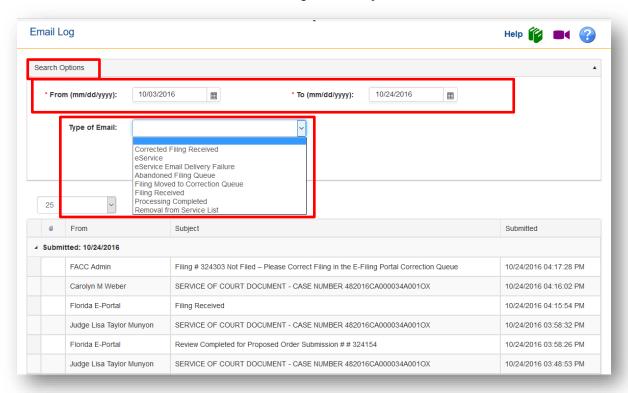
#### **E-service Favorites**

Your list of E-service Favorites are found here. To remove a person from your favorites list, deselect the person from the E-service Favorites tab. That person will no longer appear in your list when you add to the E-service list using your favorites. They are not deleted from your E-service Favorites list in case you need to add them back into the list.



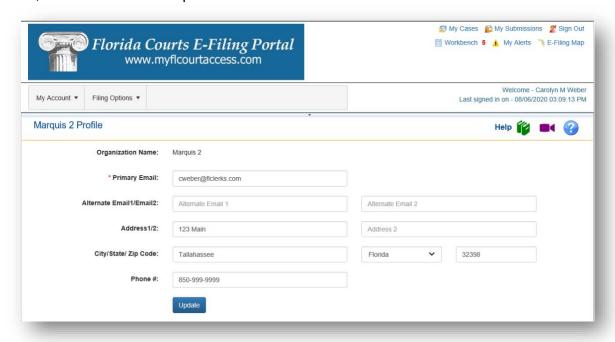
## **Email Log**

Email Log gives the user the ability to find all of the emails received from the Portal during the time specified. The Email Log also gives the users the ability to search for older emails and for the Type of Email. These emails will remain in the Email Log for **90 days**.



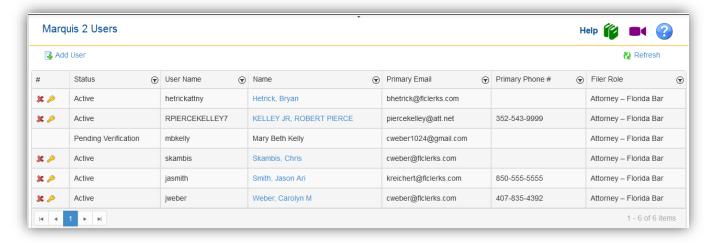
# **Edit Organization**

This option provides the administrators with the functionality to change/update the organization's address, email addresses and phone number.



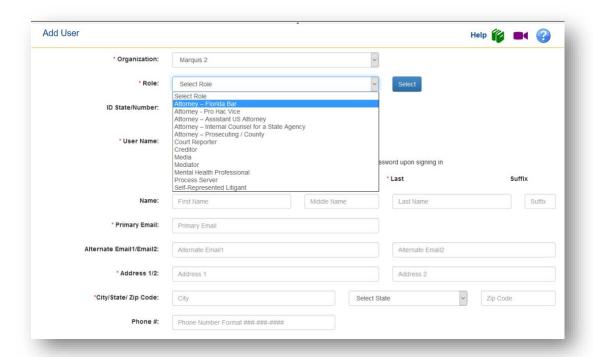
# **Manage Users**

This option allows the administrators to view list of users for the organization, add users, edit users, reset passwords, and disable user accounts.

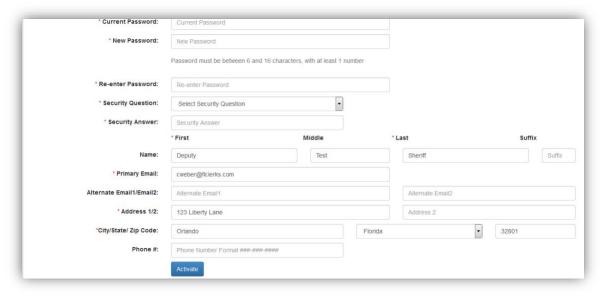


#### **Add User**

The Add User option allows the administrator to establish new user accounts for the organization. New user accounts or administrator accounts can be created by the organization administrator. Administrators must complete all required fields. The user receives an activation email at the email address entered as Primary Email.

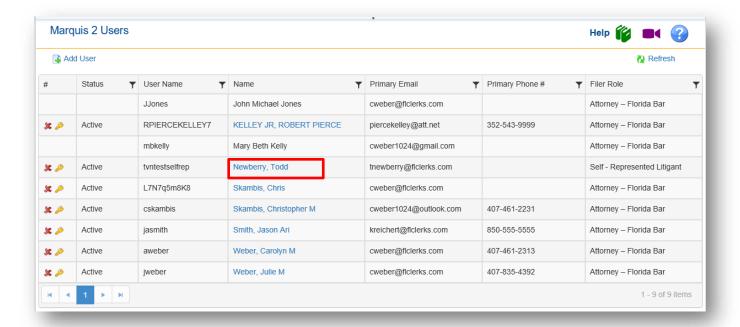


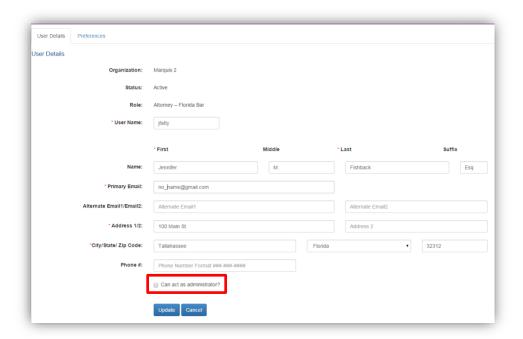
When the new user receives the email and selects the link in the email to activate the account they will receive an account activation screen to allow them to complete the security requirements for the account. Once the required fields are completed and the new user clicks 'Activate' they can log into the Portal.



#### **Edit User**

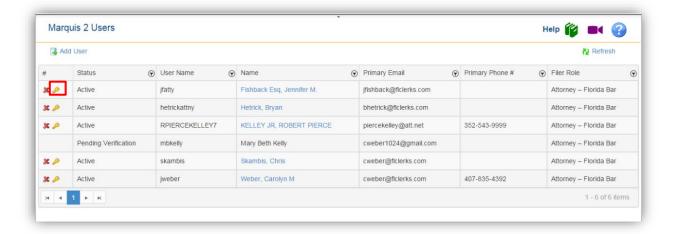
This option allows the administrator to update a user's account. Updates are allowed to the user name, address, email address and phone number. The account can also be set to act as an administrator or this functionality can be removed from a user by checking or unchecking the *Can act as administrator?*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

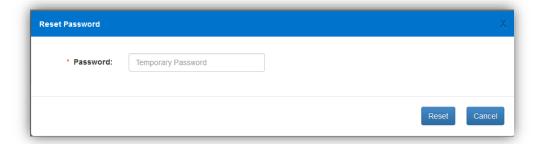




### **Reset Password**

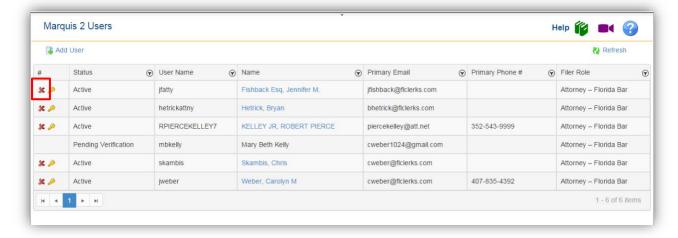
This option allows the administrator to reset passwords for the organization's users. The administrator's only option is to assign a temporary password. The user will be required to enter a new password when they log into the Portal. The administrator cannot see the current password on an account. The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

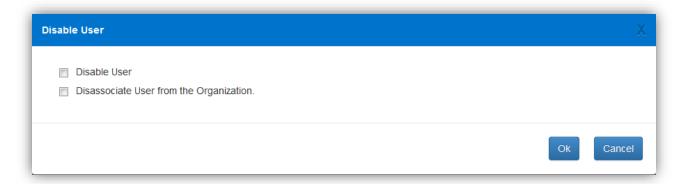




#### Disable/Disassociate User

This option allows the administrator to disable or disassociate the user account. Organization administrators will select the red X beside the user they are choosing to disable or disassociate.

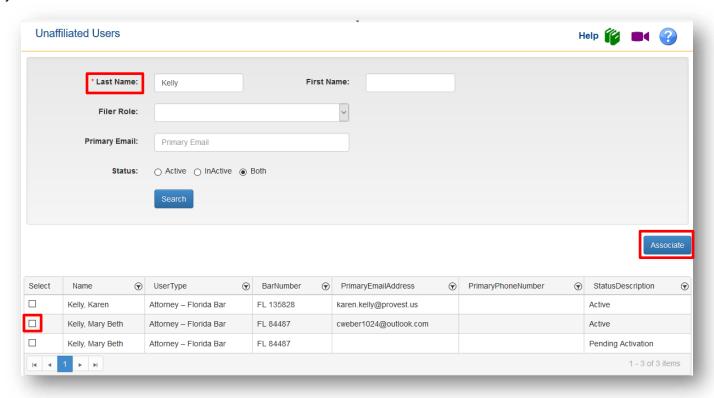




- Disable User Sets the user account to inactive. To reactivate the account call Florida Courts
   E-Filing Support Services at 850-577-4609 or email to support@myflcourtaccess.com
- Disassociate User form Organization Removes the user from the Organization but allows the
  user to continue filing using the same credentials. Be sure the user updates their email
  addresses.

## **Unaffiliated Users**

This option allows the organization administrator to attach users to their organization. An Unaffiliated User is one who has registered online and the organization affiliation has not been established. For instance, if a user registered online as an attorney and has now joined a law firm, the organization administrator can search for the user's name and affiliate them with the organization. The initial screen presented to the administrator when selecting this option is a search screen. Enter the name of the user and click on Search. A list of Unaffiliated Users matching the entered search criteria are returned in the grid below. Locate the user to be added to the organization. Check the radio button of the user you would like to add and select the **Associate** button.



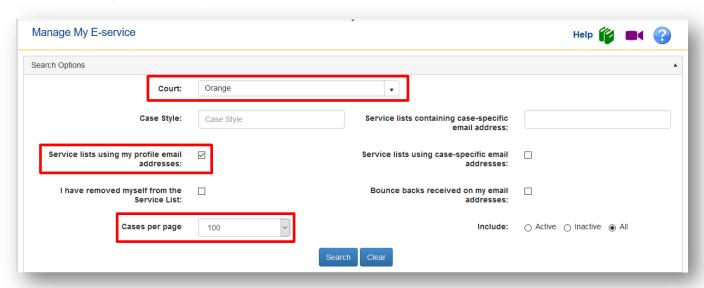
# Manage My E-service

This option allows you to search for cases associated with your organization and manage the E-service options. This was created to allow the organization administrator to manage a large number of cases at once. The Maintenance Actions you have available in this tab are:

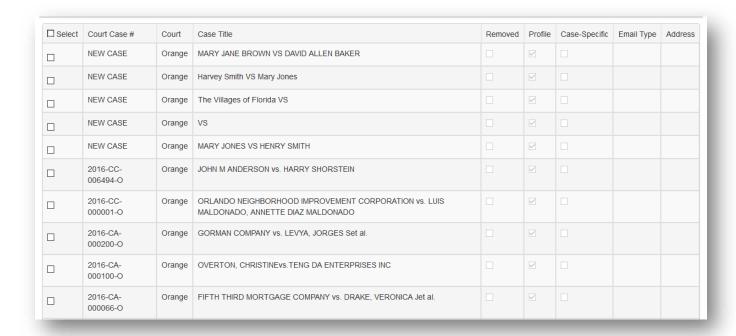
- > Remove me from the E-service list
- Update my designated email address
- > Use My Profile email addresses for E-service
- Use these case-specific email address for E-service

## **Search Options**

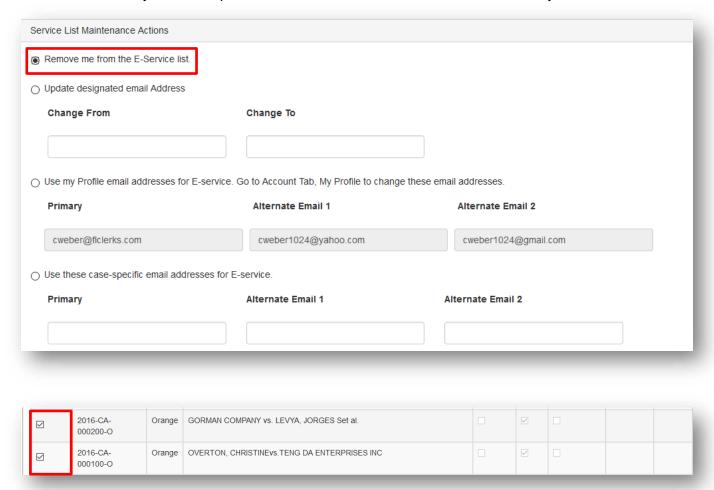
Using the Search Options fields, you can maximize or minimize the result set. Remember that as the organization administrator, you are searching all of the cases that the users in your organization are linked to. Select your Search Options and then click on **Search**.

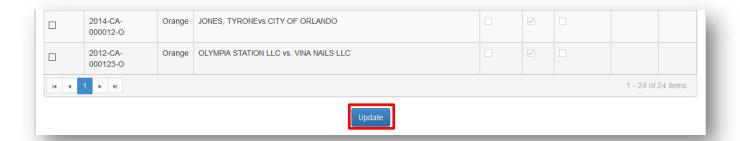


The results set will appear at the bottom of the page.

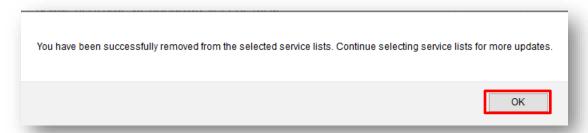


To limit your results set, limit your search. Then designate the Maintenance Action you wish to perform and select the cases you wish to perform this Maintenance Action on and click on **Update**.





You will receive confirmation of the Maintenance Action.

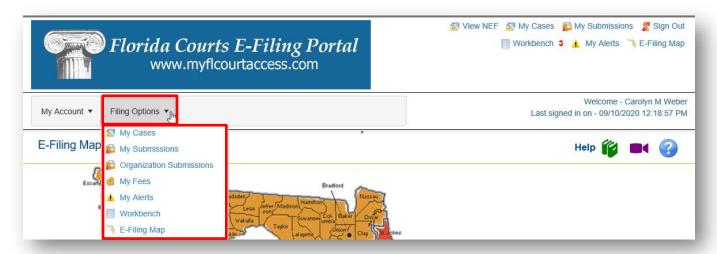


Click on **OK** to continue.

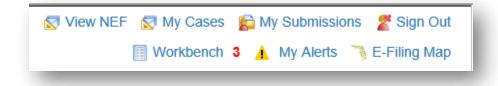
# **Filings Options**

The Filings option provides the administrator with the following options:

- My Cases
- > My Submissions
- Organizational Submissions
- My Fees
- My Alerts
- > Workbench
- E-Filing Map

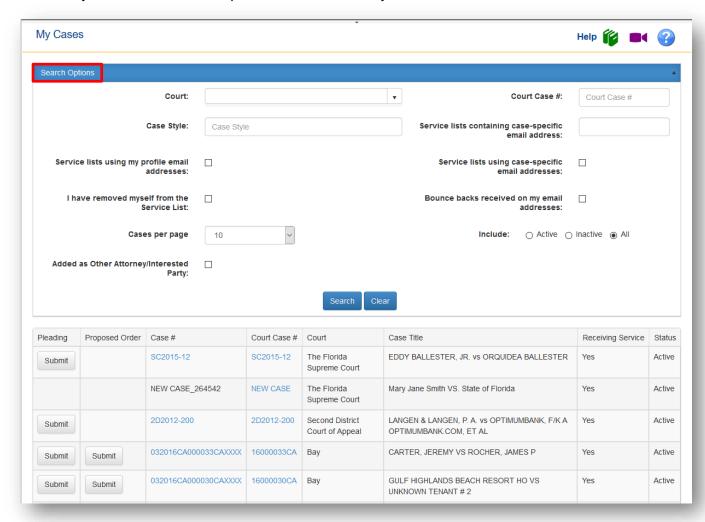


These are also available in the Quick Links which is located in the upper right hand corner of the screen.



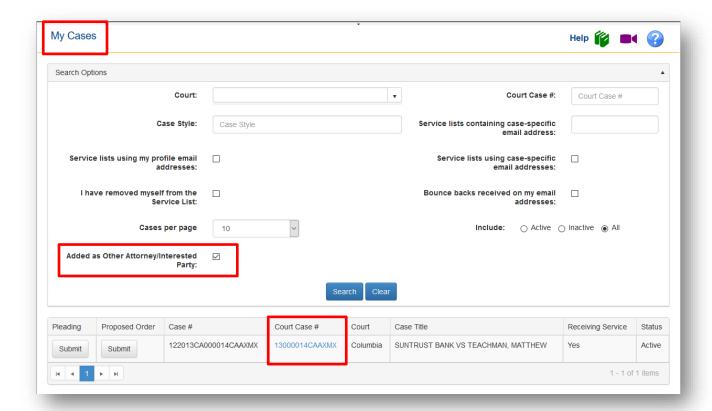
### **My Cases**

My Cases allows the user quick and easy access to all of the cases the organization has filed to electronically. There are Search Options to further define your search.



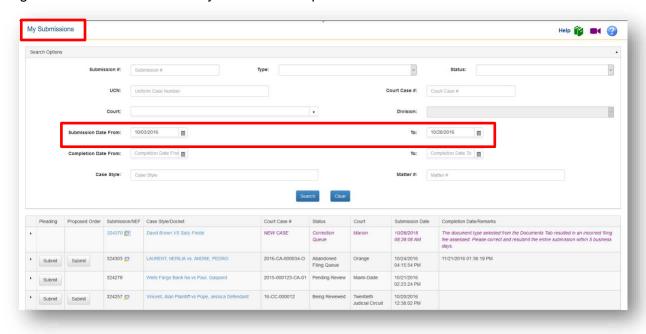
#### Removal from an E-service List

If you have been added to a case as an 'Other Attorney/Interested Party, you can select that Search Option and pull up the list of cases. From there, by selecting the Court Case # link you can remove yourself from the E-service List for that case if you do not which to receive the Email Notifications.



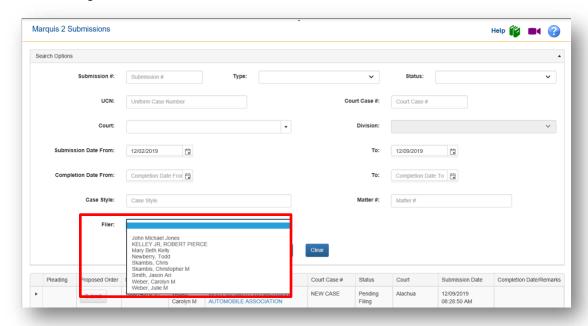
## **My Submissions**

The My Submissions option allows filers to view a list of filing submissions they have submitted using the Portal. This page allows the filer to view the status of the submission and create a list for a date range. Users also have the ability to search for specific submissions.

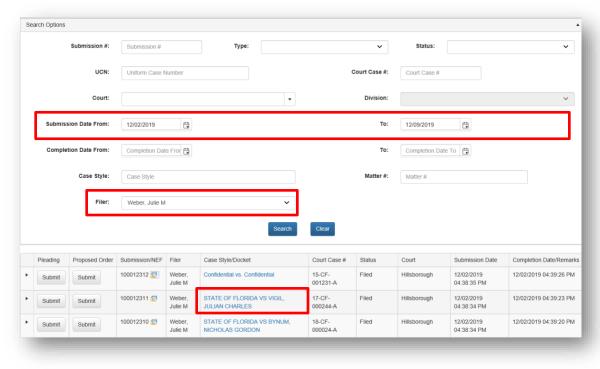


## **Organization Filings**

The Organization Filings option allows the administrator to view a list of filings submitted by their organization using the Search Options. This page allows the filer to view the status of the submission and create a list for a date range. The administrator also has the ability to search for filings by a specific filer within their organization.



The result set will pull up the list of submissions made by the specified filer. From that page you also have access to the official court file by clicking on the Case Style/Docket link.

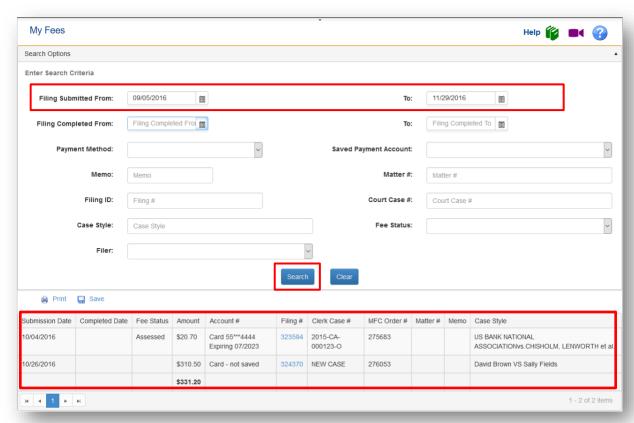


## My Fees

The My Fees page will allow the organization administrator access to all of the submissions made by anyone in their organization. They will now be able to search for submissions that contain a fee by a specific payment method. Hopefully this will make reconciliation with their bank statement easier. This too is where you can use the Matter # assigned by your organization to a specific client to your benefit. If the filer uses that Matter # field in all of their submissions on behalf of that client, then you will be able to search by that Matter # and pull up all submissions made on behalf of that client.

### Search Options:

- Filing Submitted From/To
- Filing Completed From/To
- > Payment Method
- Saved Payment Account
- Memo
- Matter #
- Filing ID
- Court Case #
- Case Style
- > Fee Status
- Filer [within the Organization]

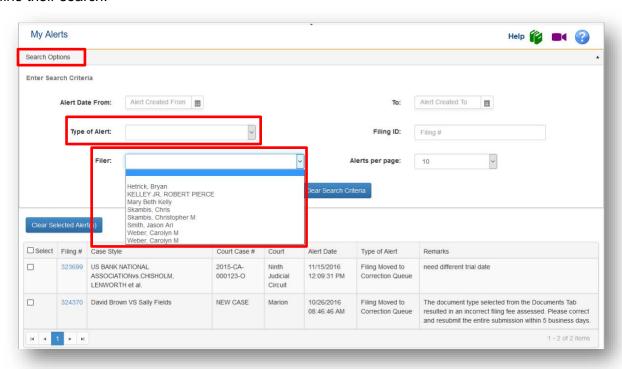


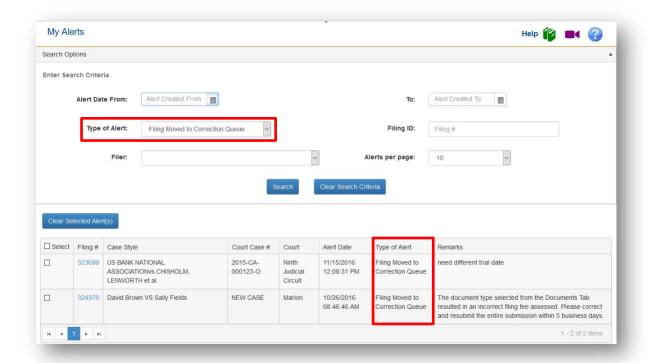
By clicking on the Filing ID number link, you will be taken to the My Submission page for that filing and you will have access to submit another pleading, proposed order, and the Notification of Electronic Filing for that submission.



## **My Alerts**

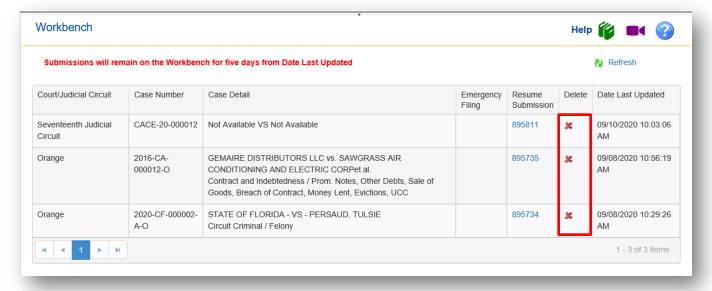
The My Alerts page will allow the organization administrator to see all of the Alerts for anyone linked to their organization. They will also be able separate out the Alerts by the filer linked to their organization. There are many Search Options to limit the result set that the organization administrator may use to refine their search.





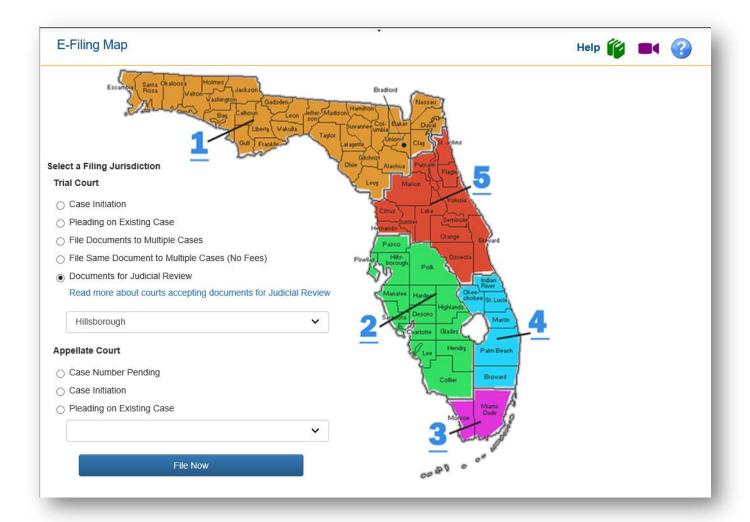
#### Workbench

The Workbench allows filers to go back and finish a filing they have saved to their Workbench. Users can resume filing or delete the filing. To resume click on the blue hyperlink submission number.



## **E-Filing Map**

The E-Filing Map allows the user to pick a jurisdiction to file in, specify a county or a circuit, submit a proposed document, create a new case and file to an existing case.



# **Filing**

For information on filing a new case or submitting a pleading on an existing case, please see the Portal E-Filer User Manual for detailed steps.