Oakland County Sixth Judicial Circuit Court

E-File&Serve Administrator Guide

April 29, 2008

The Firm Administrator

Role of the Administrator

Every firm needs to designate a person to administrate the E-Filing system. Even if there is only one user, there must be a designated Firm Administrator. The Administrator will initially register the firm with the system and will set up and maintain all data for users, credit card accounts, and attorneys at the firm. A firm may have multiple Administrators but, rather than having separate accounts, they will share a username/password combination for the firm administrator account. However, only one person may be logged in as the Administrator at any given time.

Firm ID

Each firm will choose a Firm ID during the registration process. The Firm ID serves as the common identifier of all users in the firm so that filing transactions can be accomplished and viewed by anyone at the firm. In firms with multiple office locations, it is possible to have a single Firm ID or multiple Firm IDs, according to firm preference. Because users with the same Firm ID can review everything filed by their firm, different Firm IDs might be desirable to avoid potential conflicts of interest.

Step 1: Set Up Users

The Administrator must set up all users for the system. Users can be legal assistants, paralegals, or attorneys. The User List should include all the users who may e-file on behalf of the firm.

Usernames and Passwords

The username should be similar to other logins that the users have been assigned. There is no need to use an official full name; the username never appears on any forms or as part of a signature.

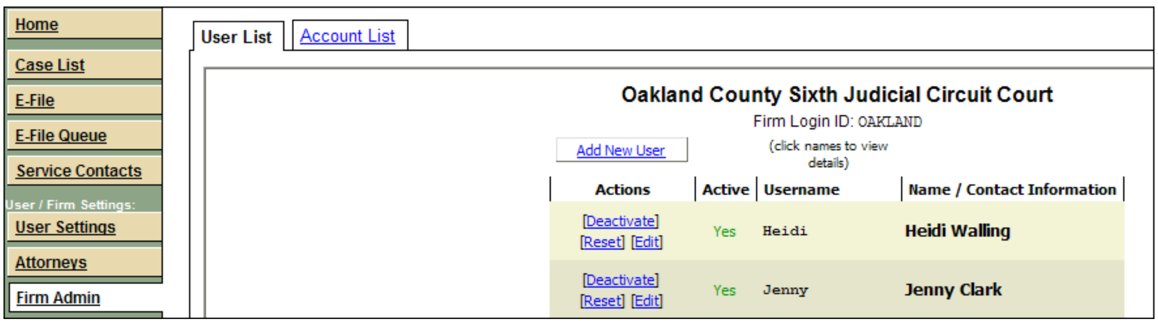
A password must be a minimum of 6 alphanumeric characters. It must include at least one number.

Legal Assistants and Paralegals as Users

You do not need to be an attorney to be a user in the system. A legal assistant or paralegal will be required to select the name of the attorney on whose behalf they are filing. The name of the individual who submitted the transaction and the name of the attorney will both appear in the details for the filing.

Add a User

1. Select Firm Admin from the main menu.
2. On the Administration screen, select the User List tab.
3. Click Add New User.
4. Fill in all fields to enter personal information and establish a username and password.
5. Click Add.
6. To add a second user, click Add New User again and return to Step 4.



Edit User Information

1. In the Firm Admin section, click on User List.
2. Click on the [Edit] link next to the user whose information you wish to edit.
3. Change any desired information.
4. Click Update.

Change a User Password

1. In the Firm Admin section, click on User List.
2. Click on the [Edit] link next to the user whose password you wish to change.
3. Click Set New Password.
4. Type in the new password.
5. Confirm the new password.
6. Click Update.

Activate/Deactivate Users

1. In the Firm Admin section, click on User List.
2. Click [Activate] next to the user you wish to activate.
3. Click [Deactivate] next to the user you wish to deactivate.

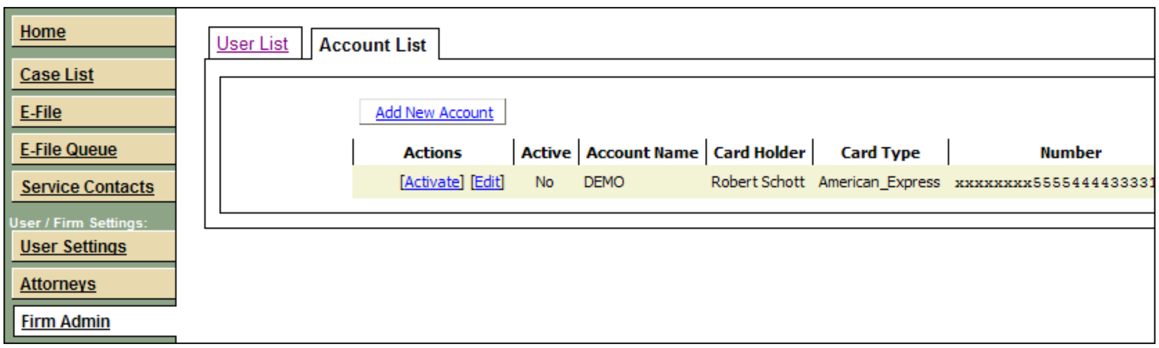
Note: For historical purposes, it is not possible to delete a user.

Step 2: Set Up Accounts

You must set up at least one credit card account to pay for the vendor and filing fees. You can set up as many accounts for your firm as you need. All major credit cards are accepted. The users will not have access to the credit card numbers; they will only see the name that is given to the account. Each user will be able to choose from the list of account names when filing a document.

Add Account Information

1. Select Firm Admin from the main menu.
2. Select the Account List tab.
3. Click Add New Account.
4. Fill in all fields.
   Note: The account name is the text that will appear in the dropdown box on the E-Filing forms.
5. Click Add.



Edit Account Information

1. In the Firm Admin section, click on Account List.
2. Click on the [Edit] link.
3. Change any desired information.
4. Click on Update.

Activate/Deactivate Accounts

1. In the Firm Admin section, click on Account List.
2. Click [Activate] next to the account you wish to activate.
3. Click [Deactivate] next to the account you wish to deactivate.

Note: For historical purposes, it is not possible to delete a credit card account.

Step 3: Set Up Attorneys

The Administrator must create a list of the attorneys in the firm who will be filing pleadings through the system. The address, email address, telephone number, and other information for each attorney will be automatically added to the cover sheet, and the name will be placed in a dropdown box on the E-Filing form. When doing a filing, a user will select from this list which attorney the filing is on behalf of.

Add an Attorney

1. Select Attorneys from the main menu.
2. Click Add New Attorney.
3. Fill in all fields.

Note: For pro se, put "0000" in for the "P" number.

4. Click Add.

Edit an Attorney

1. In the Attorneys section, click the [Edit] link next to the attorney's name.
2. Change any information.
3. Select Update.

Deactivate an Attorney

1. Select Attorneys from the main menu.
2. Select [Deactivate] next to the attorney's name you would like to deactivate.
3. When prompted to confirm, click OK.

Step 4: Set Up Firm Contact List (Optional)

The Firm Contact List is a list of all contacts that you or others in your firm have entered; this list is available for all cases. In advance of providing users with login information, you may wish to add attorneys and others from your firm to this list so that they are properly set up to attach their contact information to the service list for a case.

Add a Firm Contact

To add a firm contact to the Firm Contact List:

1. If you already have a case selected in the status bar at the top, select Service Contacts from the main menu.
2. If no case is selected, click on the Service link next to the case name in the “Home” tab or “Case List” tab.
3. Click Add Contact
4. Fill in all fields.
5. Click Add.

Edit a Firm Contact

To edit the information for a particular contact:

1. If you already have a case selected in the status bar at the top, select Service Contacts from the main menu.
2. If no case is selected, click on the Service link next to the case name in the “Home” tab or “Case List” tab.
3. Click [Edit] next to the contact name.
4. Enter the new information.
5. When finished making changes, click Update.

If you do not complete this step, you will need to direct each user to add his or her own contact information to the Firm Contact List.

Once the Administrator tasks are complete, you can provide account information to your individual users so that they can login and begin using the system.