



eFlex Electronic Filing – Filer Interface

User's Guide for Filers

Montgomery County Probate Electronic Filing

June 2016

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Introducing e-Filing

e-Filing Basics

The Montgomery County Probate e-Filing system is designed to make the work associated with initiating and processing a case more efficient for both filers and court personnel. For the initial phase, the web-based filer interface allows attorneys and registered filers (Pro Se) to create documents and submit them to the court electronically. The filer interface also provides the means for users to view case histories, check the status of submissions, send follow-up documents, and access service lists.

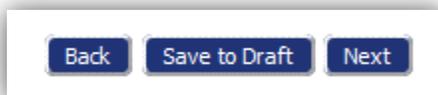
For court personnel, the software routes the filings to the appropriate personnel for review, response, generation of additional documents, or further action. For most integrations, when documents are filed in hard copy, once the court personnel scan the documents, the filer interface distributes a courtesy notice to electronic participants on the case so those participants may access the documents electronically.

This user's guide is intended to instruct filers on the features of the eFlex system. Check the Montgomery County Probate eFiling login page for eFiling instructional opportunities.

In order to progress through eFiling a case with the greatest ease, following the steps outlined in this manual is highly recommended, including document preparation as discussed below.

Also, for best results, users are strongly encouraged to use only the navigation buttons that are displayed on the eFiling interface. These will appear at the bottom of each page and will give the user options such as **Back** or **Next**.

Figure 1: Navigation within the eFlex Software Product



Additionally, the filer may use the menu bar located at the top of each page, just below the Montgomery County Probate banner. Another navigation option is the breadcrumb trail at the top of every page. This appears just below the menu bar, and the active links show the pages the user has visited to get to the current page. Clicking on any of these links will take the user back to the page listed.

Figure 2: eFlex Breadcrumb Trail

The screenshot shows the eFiling interface for the Probate Court. At the top, there is a header with the Montgomery County logo, a judge's photo, and the text "Probate Court eFiling". Below the header is a navigation menu with "Home", "eFile", "Cases", "My Profile", and "Log Out". The user is identified as "user: Michael Williams". A red box highlights the breadcrumb trail: "Home ⇒ New Case Filing: Case Category ⇒ Case Type ⇒ Case Initiation". Below the breadcrumb trail, the page title is "Case Initiation: CHANGE OF NAME - ADULT". There is a "Client #" input field. Below that are buttons for "Add Case Participants", "Add My Parties", and "Add Other Parties", with a note: "(Any party to be served must be added as a distinct party.)". A table with columns "Remove", "Participant Name", "Type", and "Attorney/Agent for Party" is visible. At the bottom, there are buttons for "Back", "Save to Draft", and "Next".

It is important to **avoid using the internet browser back arrow** during the preparation and submission of a filing.

Document Preparation Prior to Login

For most types of cases, the filer will need to attach documents with the initial filing. Generally, those documents and any additional documents that are submitted at a later time need to be submitted as an Adobe® Acrobat® PDF file (Portable Document Format). There are some documents, such as proposed orders that are exceptions to this rule and may be submitted as Microsoft® Word 2003 or higher (.doc or .docx). It is best to be prepared before logging into the filer interface.

The requirement for submitting documents in PDF files also applies to paper exhibits such as copies of contracts or copies of cancelled checks. Such paper exhibits must be scanned and saved as a PDF. Because color scans add to the file size, it is highly recommended that black and white settings be used with a lower resolution setting of 300 dpi (dots per inch) when scanning paper exhibits, unless the loss of the color degrades the value of the evidence.

For instruction on creating a PDF file, please refer to Appendix A at the end of this user guide.

Note: Individual document size is limited to 5 MB. Multiple documents can be included in a single submission. The size limitation for an entire submission is 16 MB. If the document is larger than the 30 MB limit, it will be necessary to split the document into a set of smaller files. When the large documents are split into parts, it is helpful to save the individual parts with file names such as “Part 2 of Motion,” “Part 3 of Motion,” etc. Preparing large documents in this manner prior to beginning the case initiation will save time.

Getting Started

Logging In and Requesting an Account

To begin e-Filing, the filer must first go to the “Login” page located at: <https://go.tybera.net/mcp> and request an account if they do not already have one.

The “Login” page is also the place where, periodically, the system administrator may communicate with filers by posting a message providing links to rules or forms or by posting a message notifying users of upcoming system maintenance that will make the system unavailable for a set time period.

Figure 3: Login Screen

The screenshot shows the login interface for the Montgomery County Probate Court eFiling system. At the top, there is a banner with the Montgomery County logo on the left, a portrait of Judge Alice O. McCullum in the center, and the text 'Probate Court eFiling' on the right. Below the banner, the text 'MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS' is displayed. The main content area features a large 'Welcome eFiling' heading and a paragraph: 'Welcome. You have reached the website for electronically filing with the Montgomery County Probate Court. You must have an account to use this service.' On the right side, there is a 'Log In' section with the instruction 'Enter your User Name and Password.' Below this are two input fields: 'User Name:' and 'Password:'. There are four buttons: 'Log In', 'Request Account', 'Forgot Your Password?', and 'Forgot Your Username?'. The 'Log In' and 'Request Account' buttons are blue, while the other two are text links.

1. To log into the Montgomery County Probate e-Filing system, the filers simply enter their user name and password.
2. If filers do not have a login and password, they will need to first register and create an account. To begin the registration process, click on the **Request Account** button on the login page. The “User Agreement” page will open.

Figure 4: Reading and Accepting User Agreement



3. From the User Agreement page and after reading the terms of agreement, accept the terms by selecting the proper radio button, and click **Submit**. The “User Roles” page will appear.

Figure 5: Selecting “Accept” and Clicking “Submit”

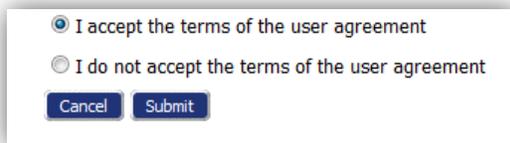


Figure 6: Association with a User Role

The screenshot shows the 'Probate Court eFiling' interface. At the top left is the Montgomery County logo. Next to it is a portrait of Judge Alice O. McCollum. The main header reads 'Probate Court' and 'eFiling'. Below the header, it says 'MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS'. The navigation path is 'User Agreement ⇒ Select User Role'. The main heading is 'USER ROLES' in red. Below it, the instruction is 'Select your user role:'. There are three radio button options: 'Attorney', 'Firm Financial Manager', and 'Self Represented'. At the bottom are 'Cancel' and 'Next' buttons.

4. Each eFlex user must have an assigned role. For the first phase of development, the roles displayed for the Montgomery County Probate eFiling system are that of Attorney, Firm Financial Administrator, and Self-Represented Litigant (Pro Se). Select the appropriate user role by clicking in the radio button.
5. Click **Next**. For all roles except Self-Represented, the “Select a Company” page will open.

Figure 7: Association with an Organization

The screenshot shows the 'Probate Court eFiling' interface at the 'Select a company' step. The navigation path is 'User Agreement ⇒ Select User Role ⇒ Select User Company'. The main heading is 'Select a company' in red. Below it, the instruction is 'Select the company you belong to or type it in below:'. There are two radio button options: 'Existing' (selected) and 'New'. The 'Existing' option is followed by a dropdown menu. The 'New' option is followed by a text input field. At the bottom are 'Cancel' and 'Next' buttons.

6. Each user must be associated with an organization. On the “Select a Company” page, use the drop-down menu to select a company that is already a part of the eFlex community. Alternately, to create a new organization account, select “New” and fill in the textbox with the company name for which an account is being established. Make sure to use the legal name of the company.

Note: If the user selected “Self-Represented,” they will not be asked to select or enter their organization’s name. The user will be taken to a Profile page to enter their personal information.

Figure 8: Creating a New Organization

MONTGOMERY COUNTY
Judge Alice O. McCollum
Probate Court
MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS
eFiling

User Agreement => Select User Role => Select User Company

Select a company

Select the company you belong to or type it in below:

Existing

New

7. Click **Submit**. The “Request a User Account” page will display.

Figure 9: Using Profile Information

Request a User Account

Company Name: MY LAW FIRM

User Name: *

Password: *

Confirm Password: *

Title:

First Name: *

Middle Name:

Last Name: *

Suffix Name:

Bar Number: *

Phone: Fax:

EEmail: *

Confirm EEmail: *

1st Alternate EEmail:

2nd Alternate EEmail:

Address Line 1: *

Address Line 2:

Address Line 3:

City: * State: OHIO

Postal Code: * Country: UNITED STATES

8. Fill in the textboxes with the appropriate information. Fields marked with an asterisk (*) are required.

9. Depending upon the requirements of the court, the chosen password may contain a specific number of characters with stipulations to include numbers or special symbols. Also, the password may be required to have a combination of both upper and lower case letters as well as numbers or symbols. Check the requirements set by the court.
10. If the user selected “Attorney” as their filer role then their bar number is required. The attorney bar number is a unique identifier, and it is through the bar number that the eFlex system connects the attorney filer to the cases he/she has submitted or to cases on which he/she is a participant. Be sure the number is typed correctly.

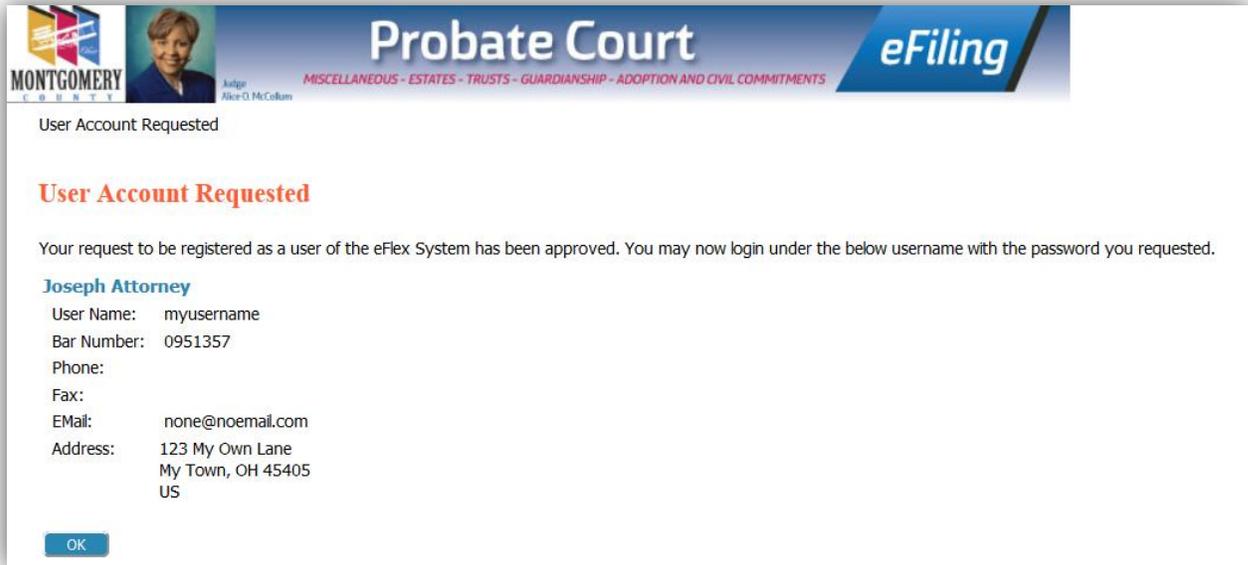
Note: If the user selected “Pro Se” then no bar number is required.

11. **Optional:** If the user is registering as Self-Represented, then the court will assign the user a master PIN. This PIN will then allow the eFlex system to communicate with the Court’s Case Management System (CMS).
12. Although not required, many attorneys make use of the alternate email fields. An assistant’s email or docketing department’s email can be entered, and the same system-generated email regarding case initiations or follow-up filings will be sent to the alternate email address entered.

Note: Some information, such as the user’s bar number, organization, or user role cannot be modified by the account holder after registration. Changes to these fields must be done through the administrator of the system at the court.

13. Click **Submit**. A page notifying that a user account has been requested appears and displays basic user information, including the company with which the user is associated.

Figure 10: Notification of User Account Request



14. Click **OK** to be returned to the “Login” page. When the user has completed the registration, their request will go through the court’s approval process. Once approved, the user will receive an email message stating such and can then log in to the e-Filing system using their username and the password established during the registration process.

Resetting Forgotten Password

1. If the user has forgotten their password, on the “Login” page, click “**Forgot Your Password?**” The “Request Password Reset” page will appear.

Figure 11: Requesting a Password Reset

Log In

Enter your User Name and Password.

User Name:

Password:

Redaction: I have read the notice.

[Forgot Your Password?](#)

Reset Password

Request Password Reset

After submitting your user name, an email will be sent to the primary email address listed in your account. This email will contain a secure link to ECF that will display a page containing a new random password. You will be able to log in to ECF using this new password and then change your password to one of your choosing.

Enter your user name below:

2. Enter the user name and click **Submit**.

Figure 12: Temporary Password Sent to Email

An email message will be sent with a temporary password to your email address.

3. An email containing a link will be sent to the primary email address listed on the filer’s User Profile. Upon clicking the link, they will be directed to a page with a temporary password that they may use to log into the eFlex system.

Figure 13: Temporary Password for One-Time Login

Password Reset

Your temporary password is: QQOJFDDV

4. Click **ECF Login Page** to be taken to Montgomery County Probate login page. After logging in, proceed to the "Change Password" page to change the temporary password by selecting **My Profiles > Change Password** from the menu bar located at the top of most pages.

Figure 14: Resetting a Forgotten Password



Change Password

*Required Fields

Password: *

New Password: *

Confirm New Password: *

5. Enter the temporary password in the "Password" field.
6. Create a new password following the password requirements of the court and type it into the "New Password" field. Depending upon what the court requires, the password may contain a specific number of characters, including numbers or special symbols. Also, users may be required to have a combination of both upper and lower case letters.
7. In the "Confirm New Password" field, re-type the password exactly as entered it in step 6.
8. Click **Submit** to save changes.
9. Be sure to notify any legal assistant or others who may enter filings on behalf of the attorney, of the change in password.

Navigating from the Home Page

The "Home Page" is the starting point for filers and is the default screen upon login. All the basic filer functions are accessed by clicking the appropriate button listed on the home page. Filers can also navigate using the menu bar that appears at the top of most pages on the website. Roll the mouse over the listings on the menu bar to become familiar with options not available in the list of buttons at the left of the page. For instance, on the menu bar the "My Profile" drop down list allows filers to access pages to view and modify profile information, including changing the user's password.

Figure 15: Home Page



The user identification appears on the right side below the banner.

Note: This is a web application. The web session will terminate automatically if there is no activity on the webpage for 20 minutes. A session is considered active as long as users are interacting with the web server. For example, if a user does not click a **Submit**, **Next**, or **Save** button within 20 minutes, the session will time out and log the user off the system. When the system logs out, the screen doesn’t change. It appears that the user is still logged on; however, as soon as the user clicks an action button, they will be asked to login. Typing in a text field does not count as being “active.”

Warning: Web browsers keep “Session Data.” For this reason, it is important that the user only open one instance of eFlex at a time. Multiple windows where eFlex is open could cause significant problems with the filings as information for web sessions is not stored separately by the browser. This potentially could mean if a user has several instances of eFlex open in various browser windows, then the documents the user attempted to attach to filing A actually get attached to filing B. Also, it is potentially possible that duplicate filings could be created.

Logging Out

1. Click the **Logout** button listed on the right side of the menu bar. A “Logout” page will appear.

Figure 16: Notification of Drafts (or Incomplete Filings)

The screenshot shows the Probate Court eFiling interface. At the top, there is a header with the Montgomery County logo, a photo of Judge Alice O. McCollum, and the text "Probate Court" and "eFiling". Below the header is a navigation menu with "Home", "eFile", "Cases", "My Profile", and "Log Out". The user is identified as "Michael Williams". A notification message reads: "You have incomplete filings. Are you sure you want to log out?" with "Yes" and "No" buttons. Below the notification is a table of incomplete filings.

Filing ID	Filer Fef No.	Case Number	Case Title	Filing Description	Create Date	Days Until Deletion
433		2015MSC00055		CHANGE OF NAME - MINOR	10-27-2015:02:57:09 PM	58
431		2015MSC00054		CHANGE OF NAME - MINOR	10-27-2015:01:28:52 PM	58
427		2015MSC00055	THE CIVIL CASE OF COLE SOWERS	CHANGE OF NAME - MINOR	10-26-2015:11:27:45 AM	57
419		2015MSC00055	THE CIVIL CASE OF COLE SOWERS	CHANGE OF NAME - MINOR	10-21-2015:11:22:19 AM	52
409		2015MSC00078	THE CIVIL CASE OF SCARLETT ORONA	CHANGE OF NAME - MINOR	10-12-2015:12:41:44 PM	43
404		2015MSC00055	THE CIVIL CASE OF COLE SOWERS	CHANGE OF NAME - MINOR	09-21-2015:11:47:31 AM	22
403		2015MSC00055	THE CIVIL CASE OF COLE SOWERS	CHANGE OF NAME - MINOR	09-21-2015:11:43:11 AM	22
402		2015MSC00055	THE CIVIL CASE OF COLE SOWERS	CHANGE OF NAME - MINOR	09-21-2015:11:38:13 AM	22
401		2015MSC00055	THE CIVIL CASE OF COLE SOWERS	CHANGE OF NAME - MINOR	09-21-2015:11:31:30 AM	22
400		2015MSC00055	THE CIVIL CASE OF COLE SOWERS	CHANGE OF NAME - MINOR	09-21-2015:11:24:43 AM	22
399		2015MSC00055	THE CIVIL CASE OF COLE SOWERS	CHANGE OF NAME - MINOR	09-21-2015:11:19:18 AM	22
397		2015MSC00055	THE CIVIL CASE OF COLE SOWERS	CHANGE OF NAME - MINOR	09-21-2015:10:50:46 AM	22
394		2015MSC00055	THE CIVIL CASE OF COLE SOWERS	CHANGE OF NAME - MINOR	09-21-2015:10:33:52 AM	22

2. Review the list of incomplete filings. Prior to completing user logout, the eFlex system notifies users of drafts he/she may still have in process. Because eFlex saves information entered for a filing after the addition of parties (**Save to Drafts** is clicked) or documents (**Move to Draft** is clicked), a user is able to begin a filing and leave the eFlex session before finalizing the filing. Once the user begins adding documents to the filing, the eFlex system also automatically executes a save action on incomplete filings when a user selects **Logout**. The information entered will be saved in draft form and accessible for completion on subsequent logins.

Working with Profiles

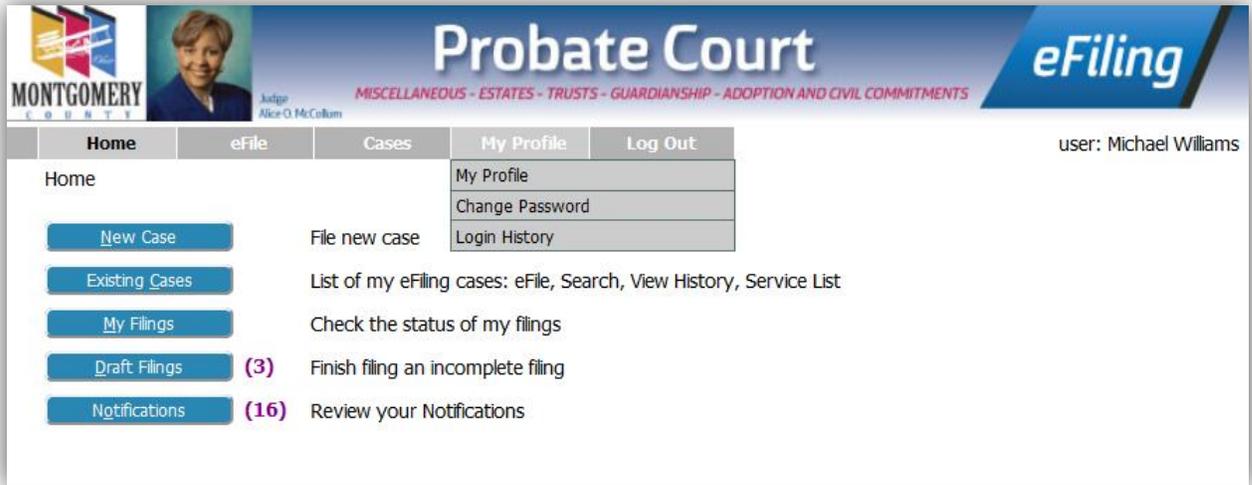
My User Profile

When a user registers for an account, they are required to provide profile information, which can be edited or updated later as needed.

Viewing or Editing the User Profile

1. Select **My Profile** > **My Profile** from the menu. The "User Profile" page will appear and display the information entered when the user account was created or modified.

Figure 17: My User Profile



2. To change the information in the user profile, click **Modify User Profile** to cause the “Modify User Profile” page to appear.

Figure 18: User Profile

The screenshot shows the user profile page for Michael Williams. At the top, there is a header with the Montgomery County Probate Court logo, a photo of Judge Alice O. McCollum, and the text "Probate Court" and "eFiling". Below the header is a navigation menu with "Home", "eFile", "Cases", "My Profile", and "Log Out". The user's name "Michael Williams" is displayed in the top right corner. The main content area is titled "User Profile" and lists the following information:

- Michael Williams**
- User Name: mw
- Organization: TYBERA TEST
- Bar Number: 0001234
- User Identifier:
- Phone: 801-555-1212
- Fax: 801-555-2121
- Email: cyoung@tybera.com
- 1st Alternate EMail: tnoonan@tybera.com
- 2nd Alternate EMail:
- Address: 563 East 770 North, Apt 5506, 563 East 770 North, UT 84097, US
- Role: Attorney
- Date Approved: Not Available
- Expiration Date:

Below the profile information are two buttons: "Modify User Profile" and "Change Password".

Below the profile information is a section titled "Wallets" with the heading "Montgomery County Probate Test". It contains a table with the following data:

Item Description	Action
Test Visa	Delete

There is also an "Add" button below the table.

Note: It is of the utmost importance that the primary email associated with this account is kept up to date as that is one way the eFlex system communicates with the filer about activity that has taken place on the filer's cases. If the user changes his/her email and does not record the new email information on the User Profile page, they will no longer receive Courtesy Notices of Electronic Filings for his cases. However, they can still login to the eFlex system and view his Notifications within the system (Notifications button on Home page).

Figure 19: Modify User Profile

Montgomery County Probate Court
 Judge: Alice O. McCollum
 MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS
 eFiling

Home | eFile | Cases | **My Profile** | Log Out user: Michael Williams

User Profile

Michael Williams

User Name: mw
 Organization: TYBERA TEST
 Bar Number: 0001234
 User Identifier:
 Phone: 801-555-1212
 Fax: 801-555-2121
 Email: cyoung@tybera.com
 1st Alternate Email: tnoonan@tybera.com
 2nd Alternate Email:
 Address: 563 East 770 North
 Apt 5506
 563 East 770 North, UT 84097
 US
 Role: Attorney
 Date Approved: Not Available
 Expiration Date:

Wallets

Montgomery County Probate Test

Item Description	Action
Test Visa	<input type="button" value="Delete"/>

Michael Williams

Role: Attorney

User Name: mw
 Title:
 First Name: * Michael
 Middle Name:
 Last Name: * Williams
 Suffix Name:
 Organization: TYBERA TEST
 Bar Number: 0001234
 User Identifier:
 Phone: 801-555-1212 Fax: 801-555-2121
 Email: * cyoung@tybera.com
 Confirm Email: * cyoung@tybera.com
 1st Alternate Email: tnoonan@tybera.com
 2nd Alternate Email:

Email Notification :
 Do NOT email me status updates for received filings
 Do NOT email me status updates for approved filings
 Do NOT email me status updates for rejected filings

Use My Company's Address
 563 East 770 North
 Orem, UT 84097
 US

Use My Address
 Address Line 1: * 563 East 770 North
 Address Line 2: Apt 5506
 Address Line 3:
 City: * 563 East 770 North State: UTAH
 Postal Code: * 84097 Country: UNITED STATES

3. On the Modify User Profile page, fields that display a textbox, radio button, or checkbox may be modified.
4. **Optional:** The alternative email addresses are provided so that someone else can receive email notices when the user receives courtesy notices on cases. This may be used for partners or assistants.
5. **Optional:** The eFlex system default is to automatically send users emails notifying them of status updates for action taken on their filings. If a filer does not wish to receive email updates on status changes for received filings, approved filings, or rejected filings on all of cases, select the appropriate checkbox to discontinue that service.

Figure 20: Email Notification Settings

EMail Notification :

Do NOT email me status updates for received filings

Do NOT email me status updates for approved filings

Do NOT email me status updates for rejected filings

6. Click **Submit** to save the changes made and be returned to the “User Profile” page.

Note: If modification needs to be made to fields without a textbox, the user will need to contact the system administrator. For instance, a system administrator is able to change a user’s assigned role or the organization with which the user is associated.

Passwords

Users may change their passwords at any time. Periodically changing an account password is a wise security measure. Remember that password requirements may differ court to court. Depending upon what the court requires, passwords may contain a specific number of characters. Also, users may be required to have a combination of both upper and lower case letters as well as numbers or symbols.

Changing the Password

1. Select **My Profile > Change Password** from the menu bar at the top of the page or, from the “User Profile” page, click **Change Password**.

Figure 21: Change Password Screen

Change Password

***Required Fields**

Password: *

New Password: *

Confirm New Password: *

2. Enter the current password in the “Password” field.
3. Create a new password following the password requirements, and type it into the “New Password” field.
4. In the “Confirm New Password” field, re-type the password exactly as entered it in step 3. Re-typing helps to ensure the password has been entered correctly and the user will be able to access their account upon subsequent logins. Copying and pasting the password into the confirm password field will copy any typing errors created in the first entry.
5. Click **Submit** to save changes and return to the “User Profile” page.
6. Be sure to notify any legal assistant or any others who file using this account of the password change.

Note: When changing a password using the “Forgot My Password” feature on the log-in page, make sure to type in the new temporary password in the first password field.

Login History

The “Login History” screen shows successful and failed logins to help users monitor any unauthorized login attempts.

If an account has too many login failures, the system will automatically suspend the account. If this occurs, call the system administrator to reset the password. Changing the account password on a regular basis is one way to help avoid unauthorized access to the account.

Viewing Login History

1. Select **My Profile > View Login History** from the menu. The “Login History” page appears displaying a list of the login attempts along with the date, login result, and IP address of the requesting machine.

Figure 22: Login History

Login History

Login History

Michael Williams Log In History

Employee Account Status: Active Entries per page: 50 ▼

Date Logged In	Log In Result	Requesting IP Address
2016-06-02 16:32:41.0	Succeeded	192.168.247.151
2016-06-02 16:32:38.0	Denied	192.168.247.151
2016-06-02 15:39:31.0	Succeeded	192.168.247.151
2016-06-02 15:01:35.0	Succeeded	192.168.247.151
2016-06-02 14:41:08.0	Succeeded	192.168.247.151
2016-06-02 14:41:05.0	Denied	192.168.247.151
2016-06-01 20:10:42.0	Succeeded	192.168.247.151
2016-06-01 20:10:39.0	Denied	192.168.247.151
2016-05-31 19:44:52.0	Succeeded	192.168.247.151
2016-05-31 19:44:49.0	Denied	192.168.247.151
2016-05-30 14:57:11.0	Succeeded	192.168.247.151
2016-05-30 12:31:12.0	Succeeded	192.168.247.151
2016-05-27 12:16:01.0	Succeeded	192.168.247.151
2016-05-26 14:02:18.0	Succeeded	192.168.247.151
2016-05-19 10:22:59.0	Succeeded	192.168.247.151

2. Use the menu bar at the top of the page to navigate to the next task.

Setting Up Payment Options (Wallet Accounts)

In most case initiation and some filings to existing cases, there will be a court fee incurred. The court fee will display in the “Review and Approve Filing” page. On the Review and Approve page, the filer is presented with payment options.

Selecting the waiver option instructs eFlex not to ask for payment information and to continue with the submission. The clerk will process this submission, determining whether the waiver request is appropriate. Generally, if the waiver request is not appropriate, the submission will be returned to the filer.

Most often, the filer will select a “Wallet Item” through which to make payment to the court. A wallet account is established through the eFiling system and enables the user to pay the court fees without having to enter credit card or checking account information for each submission. An individual filer or a Firm Financial Administrator can set up a wallet with payments made from a credit card (Discover,

MasterCard, or Visa), a checking account, or both. Where it is appropriate for payment to be made, payment will be collected (credit card or checking account charged) after the submission has been processed and approved by the court.

Figure 23: Payment Methods

Review and Approve Filing

Case Type : OTHER

Filer Ref No.

Estimated Fees: \$5.00 Add Wallet Item

Wallet Item: Test Visa - *1111

No Payment

Waiver/Exempt --exempt from paying court costs

Defer/Indigent --defer court costs or poverty affidavit filed

Generated Case Data: Change Case Data

[View Data](#)

Document(s) to be Submitted: Add/Remove Documents

Document Name	View Document
PETITION	Petition.pdf

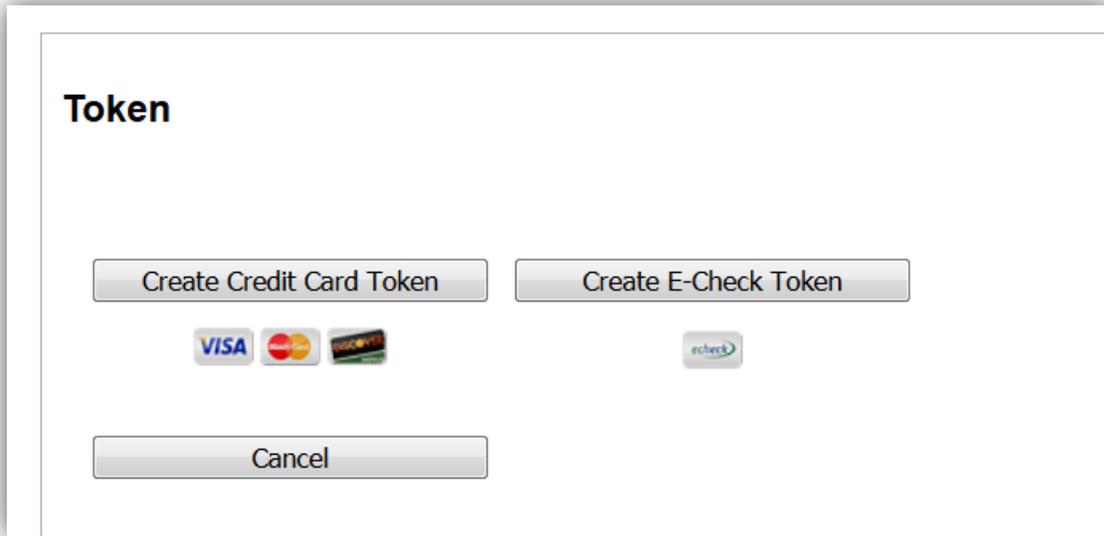
Special Filing Instructions for the Clerk:

Setting Up a Wallet Account as an Individual Filer

1. Login to the eFlex system and navigate to the “My Profile” page.

Figure 24: My Profile to Set Up Wallet

2. Locate the “Wallets” section at the bottom of the screen, and click the **Add** button.

Figure 25: Creating a Payment Account Token

3. The user is creating a wallet token that will be used to pay court fees incurred per submission. Select the type of token to create by clicking the appropriate button.
4. To create a token with a credit card, complete the following:

Figure 26: Entering Payor Information

Credit Card Billing Information

* - Required Field

First Name

Middle Initial

Last Name

Billing Address

Country *

State

City

Postal Code *

Phone

Email Address

Retype Email Address

5. An asterisk * indicates a required field. Once all information is entered, click **Next**.

Figure 27: Entering Credit Card Information

Credit Card Billing Information

Payment Information

* - Required Field

Credit Card Number *   

Expiration Date Month * Year *

Name on Card *

Card Verification Number * 

Terms and Conditions

PAYMENT TERMS AND CONDITIONS

CONVENIENCE FEE

A convenience fee is charged by Heartland Payment Systems for making payments on this website. The convenience fee is 2.50%. The convenience fee is included in or has been added to your payment.

AUTHORIZATION

I agree to the terms and conditions.

6. Enter credit card information. An asterisk * indicates a required field. Check the “Agree to the Terms and Conditions,” and click **Next**.

Figure 28: Verifying information

Credit Card Billing Information

Payment Information

Verification

First Name	B.
Middle Initial	K
Last Name	Kenison
Payor Address	563 n
City	dayton
Country	United States
State	Ohio
Postal Code	45400
Phone	(330) 254-8989
Email Address	

Credit Card Number	xxxxxxxxxxxx1111
Expiration Date	xx / xxxx
Name on Card	bk
Card Verification Number	xxx

7. Verify the information, and click **Create Token**.

Figure 29: Token Created Successfully

Payment Receipt

Merchant Name	Montgomery County Probate Test
First Name	B.
Middle Initial	K
Last Name	Kenison
Address	563 n
City	dayton
Country	United States
State	Ohio
Postal Code	45400
Phone	(330) 254-8989
Email Address	

Token created successfully!

Credit Card Number	xxxxxxxxxxxx1111
Expiration Date	xx / xxxx
Name on Card	bk
Card Verification Number	xxx

Finish

- 8. Click **Finish** to complete the process.

Figure 30: Entering Account Name or Description

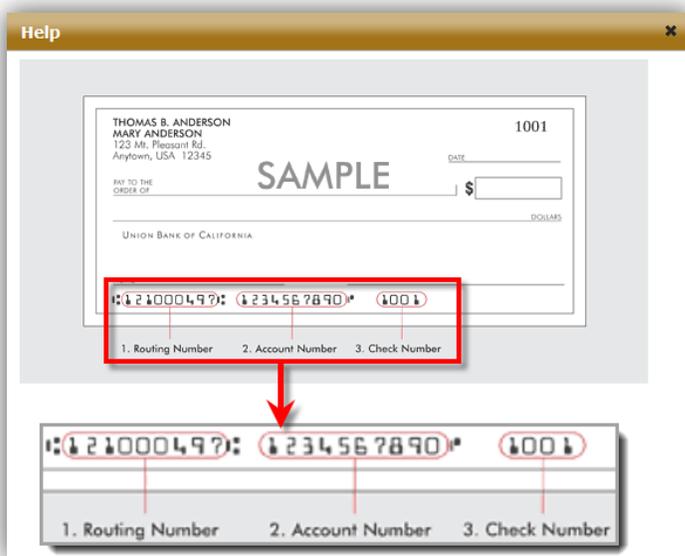
Payment Setup

Wallet Item Description:

Submit

9. Enter a unique description for this account. The description will display in the payment options of a submission incurring court fees.
10. **Optional:** To create token using the E-Check, click the “Create E-Check Token.” Follow the steps above, inserting bank routing information and account number rather than the credit card account number. For assistance with questions regarding the routing number, click on the question mark icon  for a pop-up “Help” box.

Figure 31: Routing Number Pop-Up Help Dialog



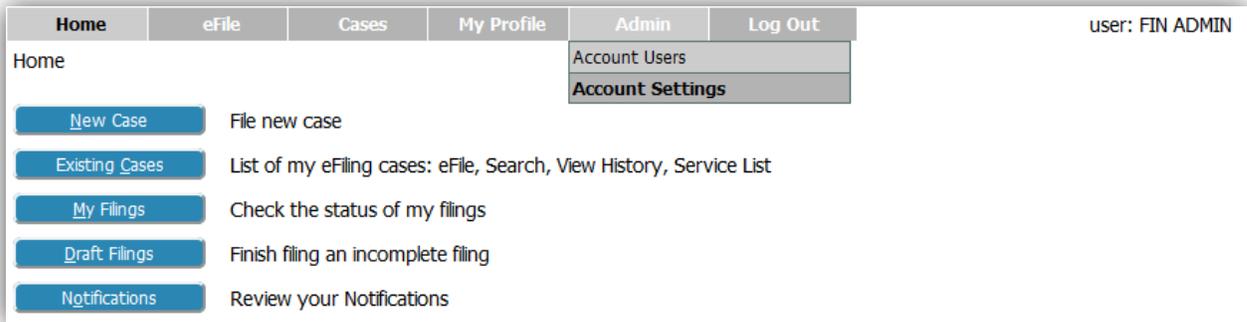
11. If the filer has additional accounts to add, click **Add** and follow the same procedures described above.

Setting Up a Wallet Account as a Firm Financial Administrator

Most of the steps that a Financial Administrator will follow to set up a wallet account for the firm are identical to the Individual Wallet setup. However, there are a few differences addressed in the steps that follow. For individual users setting up their own wallet, association to the wallet is automatic upon setup. However, a Financial Administrator, once they have created the “wallet,” must specify which attorneys can use this account to pay their court incurred fees.

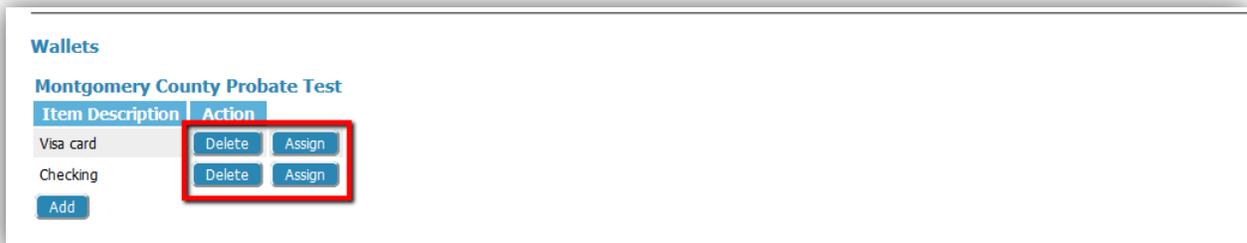
1. Login as the Financial Administrator.
2. Select **Admin > Account Settings** from the menu bar.

Figure 32: Financial Administrator Navigation to Wallet Set-up



3. The “Account Settings” page displays. In the “Wallet” section, click **Add**.
4. Create one or more wallet tokens as described above.
5. As a final step in creating each token, the Firm Financial Administrator will enter a name or description for the account and click **Submit**.
6. The user is returned to the Account Settings page.
7. In the “Wallets Accounts” section at the bottom, the filer will notice the “Wallet” has a new set of buttons. **Delete** removes the wallet account. The **Assign** button allows the user to specify which attorney or attorneys can charge court fees to the account.
8. Click on **Assign**.

Figure 33: Assigning User to a Wallet Account



9. A page listing all the attorneys in the firm displays, and all attorneys have a checkbox to the right of the name listing.
10. Use the checkboxes to select the user (or users) who is allowed access to the account. The user can also use the **Select All** button to select all the users in the list or **Clear All** to deselect all the checkboxes. Once a selection has been made, click **Save Changes**.

Figure 34: Assigning Users to the Credit Card Account

Modify Account Settings ⇒ Assign Wallet Items

Assign Wallet Items

Current Wallet Item: 1111 - Visa card

Name	User Name	Access to Item
ADMIN, FIN	FinAdmin	<input type="checkbox"/>
Test, Sherri	Sherri	<input checked="" type="checkbox"/>
Test, Zane	Zane	<input checked="" type="checkbox"/>

11. The user is returned to the Modify Account Settings page.

Setting Up a Wallet Account as Self-Represented Litigant

1. Login as the Self-Represented.
2. Setting up a wallet account for a Self-Represented Litigant is basically the same procedure as that of setting up a wallet as attorney and begins by selecting **My Profile > My User Profile** from the menu bar.

Figure 35: Adding a Wallet Account: Self-Represented

MONTGOMERY COUNTY
 Judge Alice O. McCollum
Probate Court
 MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS
eFiling
 Home eFile Cases **My Profile** Log Out user: Sara E. Carroll

User Profile

User Profile

Sara E. Carroll

User Name: SEC
 Organization: Self Representatives
 Bar Number:
 User Identifier: PROSE_205
 Phone:
 Fax:
 EMail: tincherk@mcohio.org
 1st Alternate EMail:
 2nd Alternate EMail:
 Address: 1 State Street
 Dayton, OH 45402
 US

Role: Self Represented
 Date Approved: 2016-03-09 11:29:00.000
 Expiration Date:
 Modify User Profile Change Password

Wallets

Montgomery County Probate Test

Item Description	Action
VISA	Delete

Add

3. Click **Add**.
4. Follow the same token creation steps as outlined for the Attorney.

Note: Like Attorneys, Self-Represented Litigants cannot assign users other than themselves to their Wallet Accounts.

Working with Cases

There are three options under the menu bar option labeled “Cases”. They are:

- “My Cases”

- “Notifications”
- “Filing Charges”

When a filer initiates a new case or sends in a follow-up filing, the case number is added to the “My Cases” list if they are a participant, and the e-Filing system recognizes that condition. From the menu bar, clicking on **My Cases** will allow the filer to access a list of cases on which they are a registered participant.

To View My Cases

1. Click **My Cases** on the home page or select **Cases > My Cases** from the menu bar.

Figure 36: List of “My Cases”

Home eFile **Cases** My Profile Log Out user: Michael Williams

My Cases Number of cases displayed per page: 50

Court: MONTGOMERY COUNTY PROBATE

Case Number [input] eFile History Service List

Ex: 2016MSC00001

Search Cases

Show Active Show Inactive Show Both

Case Title	Case Number	eFile	Case Type	Judge	Certificate	Inactive
THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	eFile	CIVIL/MISCELLANEOUS	JOSEPH GALLAGHER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF KENEDI REED	2015MSC00100	eFile	CIVIL/MISCELLANEOUS	DAVID A. WHITE	Service List	<input type="checkbox"/>
THE CIVIL CASE OF CHRISTOPHER GOTTSCHLICH	2015MSC00089	eFile	SALE OF REAL ESTATE - GUARDIANSHIP	JOSEPH GALLAGHER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	eFile	SALE OF REAL ESTATE - ESTATE	ARVIN SETH MILLER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF JENYISIS WHITE	2015MSC00054	eFile	CIVIL/MISCELLANEOUS	DAVID A. WHITE	Service List	<input type="checkbox"/>

1

From here the user can:

- View a case history of non-sealed cases that are stored electronically in the court’s case management system (CMS).
- View a case history of cases on which they are a participant.
- Filter cases by active, inactive, or both.
- View case documents.
- Search for cases.

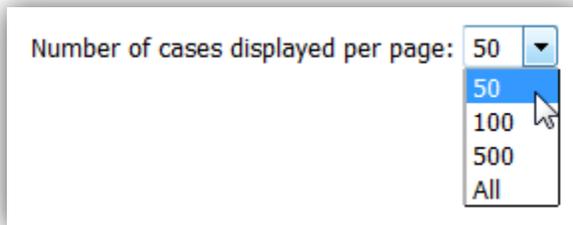
Note: A licensed attorney may see cases listed here that they have not e-Filed on; however, the attorney will not be able to download documents unless they are counsel of record. If they are indexed by the clerk as an attorney representing a party on a case, the e-Filing system will update their list as soon as anyone on the case submits something on that case through the e-Filing system.

Note: If they are a Self-Represented Filer, cases they are currently participating in may not automatically show on their list. The reason for this may be that they haven't associated their e-Filing account to their cases. They must submit a "Notice of Case Association" document on each case to have the case show on this list.

To Navigate My Cases Page

1. Limit or expand the number of cases listed by clicking on the "Number of Cases Displayed per Page" drop-down menu in the upper right corner of the page.

Figure 37: Number of Cases Displayed Drop-down



2. **Optional:** They can also pull up a Case History or Summary by entering the case number and clicking **History**.

Figure 38: Viewing the Case History



3. A detailed Case History displays in another browser tab.

Figure 39: Case History Page

2015MSC00069 :
MONTGOMERY COUNTY PROBATE COURT

Case Number	2015MSC00069	Plaintiff	ANDREW G. DOUGLAS et al
Case Type	SALE OF REAL ESTATE - ESTATE	Defendant	EILEEN E. KIDD et al
Opened	03-04-2015	Judge/Magistrate	ARVIN SETH MILLER
Status	0	Amt. of Claim	\$.00
		Jury/Non Jury	Non Jury

Show/Hide Participants

File Date	Case History
03-04-2015	COMPLAINT FOR SALE OF REAL ESTATE
03-04-2015	NOTICE
03-04-2015	PRAECIPE
03-04-2015	SUMMONS ISSUED TO
03-04-2015	SUMMONS ISSUED TO
03-10-2015	ANSWER
03-10-2015	CERTIFIED MAIL RETURN
03-10-2015	CERTIFIED MAIL RETURN

- They can also enter a case number and click **Service List**. Clicking **Service List** will open a Certificate of Service for that case. This feature is helpful if the user has not e-Filed on a case but needs to view the list of participants that need service in paper or were served electronically.
- The “Show Active,” “Show Inactive,” and “Show Both” radio buttons above the list of cases are another means of filtering what is displayed on the page. The system default is “Show Active.”

Figure 40: Show Active, Show Inactive & Show Both Filters

My Cases Number of cases displayed per page: 50

Court: MONTGOMERY COUNTY PROBATE

Case Number: eFile History Service List

Ex: 2016MSC00001

Case Title	Case Number	eFile	Case Type	Judge	Certificate	Inactive
<input checked="" type="radio"/> Show Active <input type="radio"/> Show Inactive <input type="radio"/> Show Both						

- The “+” expansion sign listed next to the case title will expand to display a list of documents submitted with the filing that is being referenced.

Figure 41: Case Sorting and Expansion Button

My Cases Number of cases displayed per page: 50

Court: MONTGOMERY COUNTY PROBATE

Case Number: eFile History Service List

Ex: 2016MSC00001 Search Cases

Show Active
 Show Inactive
 Show Both

Case Title	Case Number	eFile	Case Type	Judge	Certificate	Inactive
THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	eFile	CIVIL/MISCELLANEOUS	JOSEPH GALLAGHER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF KENEDI REED	2015MSC00100	eFile	CIVIL/MISCELLANEOUS	DAVID A. WHITE	Service List	<input type="checkbox"/>
THE CIVIL CASE OF CHRISTOPHER GOTTSCHLICH	2015MSC00089	eFile	SALE OF REAL ESTATE - GUARDIANSHIP	JOSEPH GALLAGHER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	eFile	SALE OF REAL ESTATE - ESTATE	ARVIN SETH MILLER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF JENYIS WHITE	2015MSC00054	eFile	CIVIL/MISCELLANEOUS	DAVID A. WHITE	Service List	<input type="checkbox"/>

1

7. Clicking the document title will open the document in another browser tab or in Adobe Reader, depending on the user's browser configuration.

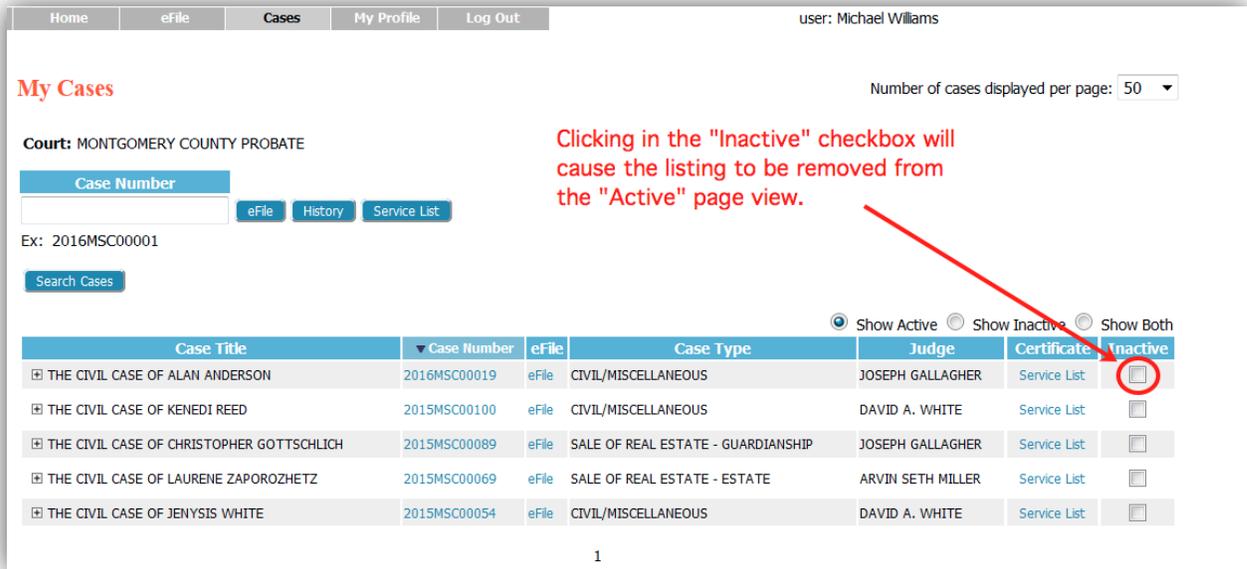
Figure 42: Document Link

Show Active
 Show Inactive
 Show Both

Case Title	Case Number	eFile	Case Type	Judge	Certificate	Inactive
THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	eFile	CIVIL/MISCELLANEOUS	JOSEPH GALLAGHER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF KENEDI REED	2015MSC00100	eFile	CIVIL/MISCELLANEOUS	DAVID A. WHITE	Service List	<input type="checkbox"/>
THE CIVIL CASE OF CHRISTOPHER GOTTSCHLICH	2015MSC00089	eFile	SALE OF REAL ESTATE - GUARDIANSHIP	JOSEPH GALLAGHER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	eFile	SALE OF REAL ESTATE - ESTATE	ARVIN SETH MILLER	Service List	<input type="checkbox"/>
2015-03-04 12:00:00 PM COMPLAINT FOR SALE OF REAL ESTATE 2015-03-04 09:46:00 AM NOTICE 2015-03-04 09:48:00 AM PRAECIPE 2015-03-04 09:48:00 AM SUMMONS ISSUED TO 2015-03-04 09:57:00 AM SUMMONS ISSUED TO						

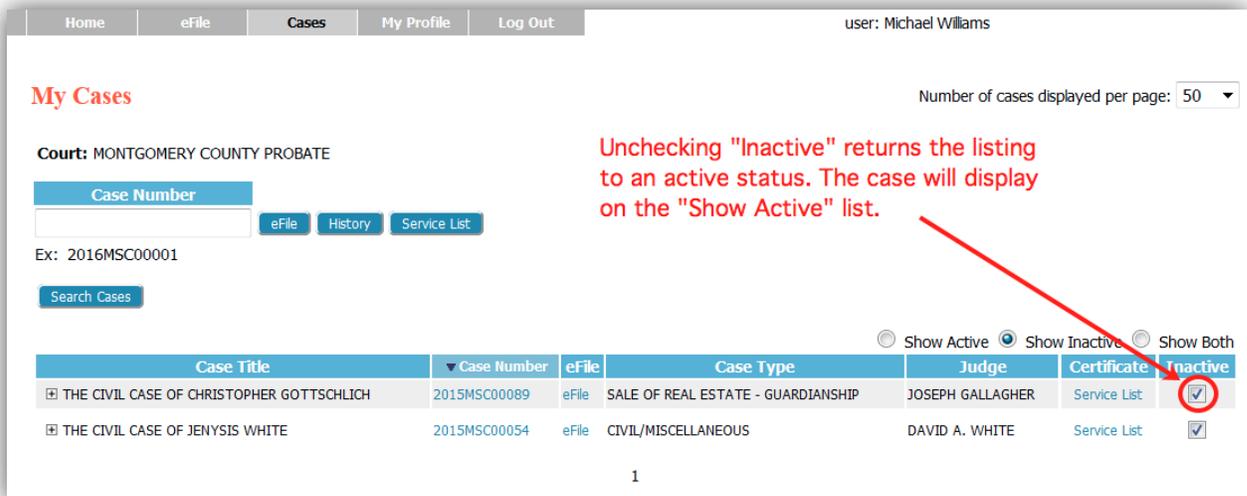
8. Filter the cases listed by selecting the "Inactive" checkbox to the right of a case on which there is no current activity. The default setting for the "My Cases" page is "Show Active" so cases flagged as "Inactive" will not be displayed on the "My Cases" list.

Figure 43: List of “My Cases”



Note: If action is taken on a case the filer has marked as “Inactive,” the filer will still receive notifications of that action and can then reset the flag to active so the case will display on the filer’s “My Cases” list.

Figure 44: “Inactive” Checkbox



- To reset a case as “Active,” select the **Show Inactive** radio button on the right side above the list. The page will refresh and only list the cases that have been marked “Inactive.”

- When the inactive cases appear on the page, un-check the "Inactive" checkbox for the entry that has become active. The entry will be reset to "Active" and will display on the "My Cases" active list.
- Optional:** Access additional information about the cases listed on the page by clicking on the "Case Number" link to view the case history or on the "Certificate" link to view the lists of both electronic participants and the list of participants who will need notifications in paper.

Figure 45: Search Cases

The screenshot shows the 'My Cases' page for user Michael Williams. The page includes navigation tabs (Home, eFile, Cases, My Profile, Log Out) and a search section for 'MONTGOMERY COUNTY PROBATE'. A table lists several cases, with the case number '2015MSC00100' and its 'Service List' link highlighted with red boxes. The table has columns for Case Title, Case Number, eFile, Case Type, Judge, Certificate, and Inactive. Radio buttons allow filtering by 'Show Active', 'Show Inactive', or 'Show Both'.

Case Title	Case Number	eFile	Case Type	Judge	Certificate	Inactive
THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	eFile	CIVIL/MISCELLANEOUS	JOSEPH GALLAGHER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF KENEDI REED	2015MSC00100	eFile	CIVIL/MISCELLANEOUS	DAVID A. WHITE	Service List	<input type="checkbox"/>
THE CIVIL CASE OF CHRISTOPHER GOTTSCHLICH	2015MSC00089	eFile	SALE OF REAL ESTATE - GUARDIANSHIP	JOSEPH GALLAGHER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	eFile	SALE OF REAL ESTATE - ESTATE	ARVIN SETH MILLER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF JENYSIS WHITE	2015MSC00054	eFile	CIVIL/MISCELLANEOUS	DAVID A. WHITE	Service List	<input type="checkbox"/>

Viewing Case History

- From the "My Cases" page, click the "Case Number" link. This displays the case history in a new browser tab. The user can also use the "Case Number" textbox to enter the case number and click **History**.

Figure 46: Case History View

2015MSC00054 :
MONTGOMERY COUNTY PROBATE COURT

Case Number	2015MSC00054	Plaintiff	JENYSIS DEMYA WHITE et al
Case Type	CHANGE OF NAME - MINOR	Defendant	PARYS BAKER
Opened	02-20-2015	Judge/Magistrate	DAVID A. WHITE
Status	O	Amt. of Claim	\$.00
		Jury/Non Jury	Non Jury

Show/Hide Participants

Plaintiff[s]	Counsel of Record
JENYSIS DEMYA WHITE 1230 MAROT DR. DAYTON, OH 45417 (614) 937-3123	MICHAEL WILLIAMS 563 EAST 770 NORTH SALT LAKE CITY, UT 84097 (801)555-1212
Payor[s]	Counsel of Record
PARYS BAKER	
Magistrate[s]	Counsel of Record
DAVID A. WHITE WHITED@MCOHIO.ORG	

File Date	Case History
02-20-2015	APPLICATION FOR CHANGE OF NAME - MINOR; ENTRY SETTING HEARING

2. Click the +/- near the upper left corner of the page to show or hide participants such as plaintiffs, defendants, or attorneys listed on the case.
3. Click a link under the “Case History” column to download that particular document. The filer’s ability to access the documents will depend on the case type and security level.

Viewing Certificate of Service

eFlex generates a Certificate of Service that informs the user which case participants will be notified electronically and which case participants will need service in paper. This information is prior to actual notification. To check who the system has notified and who remains to be notified, check the Notification of Electronic Filing by selecting **Cases > Notifications**.

1. From the “My Cases” page, click either the “Certificate” link or use the textboxes to enter the case number, court, and case title, and click **Certificate of Service**. A secondary page will open.

Figure 47: Certificate of Service



Service List

Service List RE: 2016MSC00019

Case Number: 2016MSC00019
Judge: ALICE O. MCCOLLUM
Magistrate: JOSEPH GALLAGHER
Court: MONTGOMERY COUNTY PROBATE COURT
Case Title: THE CIVIL CASE OF ALAN ANDERSON

This certificate was automatically generated by the courts auto-notification system.
Date Generated: 05-30-2016:15:11:10

As of 05-30-2016, the electronic filing system will send a Notice of Electronic Filing (NEF) to the following parties:
 MICHAEL WILLIAMS for ALAN ANDERSON
 JOSEPH GALLAGHER
 BILL BROWN

The electronic filing system will not send a Notice of Electronic Filing (NEF) to the following parties, who must be notified by a traditional method of service:
 ALAN ANDERSON

- The "Service List" view will list the electronic participants first. Those participants who need to be notified in paper will be under the heading "The electronic filing system will not send a Notice of Electronic Filing (NEF) to the following parties...."

Notifications

As part of the user's original account registration, they provided an email address and were given the opportunity to include additional email addresses. The eFlex system automatically generates courtesy emails to communicate with participants when action is taken on their cases. **The email does not include the actual documents or all the details of the submissions.** The email informs the filer there is a notice waiting for the filer to access.

A "Notice of Electronic Filing" (NEF) is a notice of documents that are filed on a case electronically and is sent to all participants on the case who have an eFiling account. Montgomery County Probate Court requires that the eFiling user continue the practice of service to non-eFiling participants in paper and include the Certificate of Service as part of the documents in this circumstance.

Once an eFiling account holder has efiled on a case and been added as a party to that case by the clerk of court, the case number is stored in a database, and their username is associated with that case. When someone else sends a follow-up submission on any case on which the eFiling account holder has been indexed as a participant, they will receive an email and the notification list will be updated with the submission information. Notifications generally go out when the court records a submission.

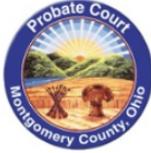
Notifications that the user logs into the eFiling system to access on the “Notifications” page are considered the official communication of the court. Courtesy emails are convenient, but are not the official communication about filings to the case. Users are strongly encouraged to make checking the Notifications page within the eFiling system part of their daily methods of operation.

Note: eFiling account holders may elect to turn off email notifications by using the checkbox fields on their Modify User Profile page.

Accessing Notifications

1. To access notifications from the “Home” page, click on the **Notifications** button. Next to the **Notifications** button on the “Home” page may be a number in parentheses such as **(3)**. This number represents the number of notifications the user has not yet accessed. The number does not include the notifications the user has already read.

Figure 48: Notice of Electronic Filing (NEF)



******* IMPORTANT NOTICE - READ THIS INFORMATION *******
NOTICE OF ELECTRONIC FILING [NEF]

A filing has been submitted to the court RE: 2015MSC00069
Judge: ALICE O. MCCOLLUM
Magistrate: ARVIN SETH MILLER

Official File Stamp: 06-01-2016:20:11:31
Court: MONTGOMERY COUNTY PROBATE COURT
Case Title: THE CIVIL CASE OF LAURENE ZAPOROZHETZ
Document(s) Submitted: MEMORANDUM
Filed by or on behalf of: Michael Williams

This notice was automatically generated by the courts auto-notification system.

The following people were served electronically:
 ARVIN SETH MILLER
 MICHAEL WILLIAMS for ANDREW G. DOUGLAS

The following people have not been served electronically by the Court. Therefore, they must be served by traditional means:
 . . MONTG. CO. AUDITOR
 . . MONTG. CO. TREASURER
 . . WRIGHT PATT C.U.
 JOAN BRANDT
 EILEEN E. KIDD

Note: The eFiling system holds all notifications, access to the details of the notifications, and the ability to download the documents.

Figure 49: Accessing Notifications

Home eFile **Cases** My Profile Log Out user: Michael Williams

Home » Notifications

Notifications

Notifications for Michael Williams

Search By: All

Go Clear Search

Delete Mark As Read Mark As Unread

Notifications per page: 50

Notification Id	Document(s) filed by...	Case Title	Case Number	File Date
765	MEMORANDUM was filed by or on behalf of Michael Williams Documents: MEMORANDUM	THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	06-02-2016
680	REQUEST was filed by or on behalf of Michael Williams Documents: REQUEST test	THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	05-18-2016
675	PROPOSED ENTRY was filed by or on behalf of Michael Williams Documents: PROPOSED ENTRY testing2	THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	05-18-2016

- The user can also access notifications from the menu bar **Cases > Notifications**.

Note: These notifications are not permanent. They are deleted after a period of time determined by the court. Generally, this auto-clean out time period is not less than 90 days. For more information regarding responsibilities for notification in paper, please refer to the Court Rules.

Figure 50: List of Notifications

Home eFile **Cases** My Profile Log Out user: Michael Williams

Home » Notifications

Notifications

Notifications for Michael Williams

Search By: All

Go Clear Search

Delete Mark As Read Mark As Unread

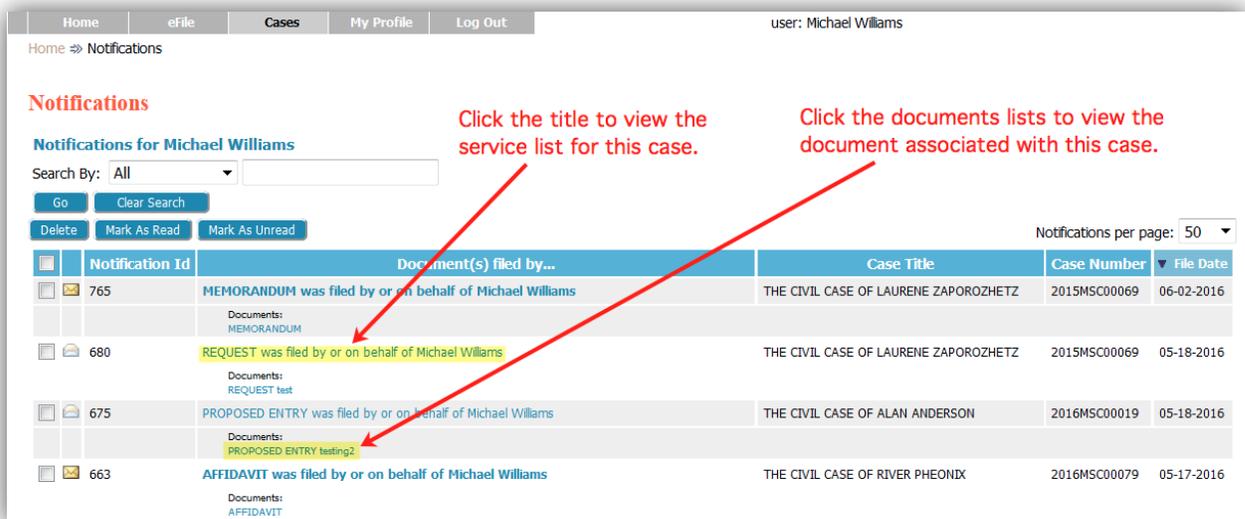
Notifications per page: 50

Notification Id	Document(s) filed by...	Case Title	Case Number	File Date
765	MEMORANDUM was filed by or on behalf of Michael Williams Documents: MEMORANDUM	THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	06-02-2016
680	REQUEST was filed by or on behalf of Michael Williams Documents: REQUEST test	THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	05-18-2016
675	PROPOSED ENTRY was filed by or on behalf of Michael Williams Documents: PROPOSED ENTRY testing2	THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	05-18-2016
663	AFFIDAVIT was filed by or on behalf of Michael Williams Documents: AFFIDAVIT	THE CIVIL CASE OF RIVER PHEONIX	2016MSC00079	05-17-2016

- An unopened envelope icon  will appear to the left of each email notification that has not yet been viewed.

4. Click the link of the submission to be viewed. A secondary page opens where the user can view the service list for the case. The list indicates both participants who have been served electronically by the court and a list of those participants who will need to be served by traditional, paper means.
5. A sub-listing of each entry will display the documents that were filed with the case. Click on the document link to download a PDF of the document onto the user's local computer.

Figure 51: Viewing Service List and Document



6. The envelope icon will change to an open envelope  after they have viewed the notification.
7. After they have viewed the notification and downloaded the related documents, they can delete the notification by selecting the checkbox to the left of the notification and clicking the **Delete** button. The page will refresh, and the deleted notification will no longer appear on the list.

Figure 52: Deleting Notifications



Viewing Filing Charges

Some documents filed require court fees. Before the filer submits anything to the court, the final step is to review the data and documents in their submission. The eFlex system automatically queries to calculate fees and displays those fees on the “Review and Approve” page for the filer.

Figure 53: Calculated Fees from the Review and Approve Page

Review and Approve Filing

Case Type : OTHER

Filer Ref No.

Estimated Fees: \$10.00 [Add Wallet Item](#)

Wallet Item: Test Visa - *1111

No Payment

Waiver/Exempt --exempt from paying court costs

Defer/Indigent --defer court costs or poverty affidavit filed

Generated Case Data: [Change Case Data](#)

[View Data](#)

Document(s) to be Submitted: [Add/Remove Documents](#)

Document Name	View Document
PETITION Albertini Petition	Petition.pdf
MOTION Motion on behalf of Nicholas Albertini	MOTION.pdf

Special Filing Instructions for the Clerk:

[Back](#)
[Cancel \(Delete\)](#)
[Move to Draft](#)
[Submit the Filing](#)

If one of the documents included by the filer requires a court fee, the filer will be required to pay the fees with a Wallet account. When payments are made, eFlex records the payments and keeps track of charges associated with each case. Payments made are tracked for a twelve month period. Because a third party vendor is used for payments and because federal law stipulates, **eFlex does not store credit card information.**

If the filer needs to waive the fees or defer payment, they should select the appropriate "Waiver" radio button. Only county, state, or other agencies that are not expected to pay court fees should select the

“No Payment” radio button. Examples of an appropriate time to select “Waiver/Exempt” would be when a defendant or a Guardian Ad Litem is filing an Answer to a Complaint

A filer who is submitting a Motion and Entry to Defer Court Costs would appropriately select the “Defer/Indigent” radio button. If the clerk determines there is a problem with the Motion and Entry to Defer Court Costs, the filing will be rejected and returned to the filer.

Viewing Filing Charges

1. Select **Cases > Filing Charges** from the menu.

Figure 54: List of Filing Charges

The screenshot shows the 'Probate Court eFiling' interface. At the top, there is a navigation menu with 'Home', 'eFile', 'Cases', 'My Profile', and 'Log Out'. The user is identified as 'Michael Williams'. Below the menu, the 'Filing Charges' section is active. It includes a date range filter: 'View Filings Between: 05/18/2016 AND 06/16/2016' with a 'Clear Dates' button and a 'Go' button. The section is titled 'May 2016 Charges for Michael Williams' and has an 'Export to file' link. Below this is a table of charges:

Case Title	Filer Ref No.	Court Case #	Description	Date	Account	Authorization Code	Fee
THE CIVIL CASE OF LAURENE ZAPOROZHETZ		2015MSC00069	SALE OF REAL ESTATE - ESTATE	06-16-2016:01:01			\$5.12
THE CIVIL CASE OF LAURENE ZAPOROZHETZ		2015MSC00069	SALE OF REAL ESTATE - ESTATE	06-02-2016:11:36			\$5.12
THE CIVIL CASE OF LAURENE ZAPOROZHETZ		2015MSC00069	SALE OF REAL ESTATE - ESTATE	05-18-2016:12:26			\$5.12
THE CIVIL CASE OF ALAN ANDERSON		2016MSC00019	OTHER	05-18-2016:11:20			\$5.00
THE CIVIL CASE OF ALAN ANDERSON		2016MSC00019	OTHER	05-18-2016:11:08			\$5.00
Total Charges:							\$25.36

2. The current month is displayed by default. Select the desired date range by using the pop-up calendars provided.
3. Click **Go**.
4. Information about each payment made during that month, including the case number, case title, method of payment, and the amount, is displayed.
5. Optional: Save the information displayed to your local machine in an Excel format by clicking “Export to File.”

Working with eFile

There are four options under the menu bar option labeled “eFile”. They are:

- **New Case**
- **Existing Case**
- **Filing Status**
- **Draft Filings**

The eFiling system enables users to file to the Montgomery County Probate Court. The following instructions will address the necessary steps for eFiling and will include screen shots of submissions where such duplication will serve to make the instructions more clear.

Initiating a New Case

Prior to initiating a new case, prepare all documents associated with the case. The default limitations are 5 MB per document and 16 megabytes per submission. For more information on document preparation, see the “Document Preparation Prior to Login” and the “Appendix A” sections of this manual.

1. From the home page, click the **New Case** button or select **eFile > New Case** from the menu bar at the top of most pages on the website.

Figure 55: Initiating a New Case



2. A “Case Category” page will appear. Click the appropriate category.

Figure 56: Selecting a Case Category



3. Next, the filer will click the link for the appropriate case type. This action will cause the screen to renew and display the “Case Initiation” page.

Figure 57: Defining the Case Type

MONTGOMERY COUNTY **Probate Court** **eFiling**
 Judge Alice O. McCollum *MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS*

Home eFile Cases My Profile Log Out user: Michael Williams

Home ⇒ New Case Filing: Case Category ⇒ Case Type

Case Type

Description
ADULT PROTECTIVE SERVICES
ASSIGN LOTTERY PRIZE
CHANGE OF NAME - ADULT
CHANGE OF NAME - MINOR
CONCEALMENT OF ASSETS
CORRECTION OF BIRTH
CORRECTION OF MARRIAGE
DECLARATION OF PATERNITY
DECLARATORY JUDGEMENT
DESIGNATION OF HEIR
DETERMINATION OF HEIRSHIP
DISINTERMENT
OTHER
PRESUMPTION OF DEATH
PRODUCTION OF WILL
REGISTRATION OF BIRTH
SALE OF REAL ESTATE - ESTATE
SALE OF REAL ESTATE-GUARDIANSHIP
SUCCESSOR CUSTODIAN
SURVIVING SPOUSE PURCHASE ACTION
TRANSFER OF RIGHTS
VALIDITY OF WILL
WILL CONSTRUCTION
WILL CONTEST

Back

Figure 58: Case Initiation Page

MONTGOMERY COUNTY
 Judge Alice O. McCollum
Probate Court
 MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS
 eFiling
 user: Michael Williams

Home eFile Cases My Profile Log Out
 Home > New Case Filing: Case Category > Case Type > Case Initiation

Case Initiation: OTHER

Client #

Add Case Participants [Add My Parties](#) [Add Other Parties](#) (Any party to be served must be added as a distinct party.)

Remove	Participant Name	Type	Attorney/Agent for Party

[Back](#) [Save to Draft](#) [Next](#)

Adding Case Data

The “Case Initiation” page allows the user to enter case-relevant information, including adding a client number for the attorney firm’s reference, and add party information.

1. Click **Add My Parties**.

Figure 59: Add Party Page

Home eFile Cases My Profile Log Out user: Michael Williams

Home ⇒ New Case Filing: Case Category ⇒ Case Type ⇒ Case Initiation ⇒ Add a Party

Add a Party: OTHER

Party Type:

First Name:

Middle Name:

Last Name: *
(or Business Name)

Suffix:

Phone:

Email:

Physical Address:

Address Line 1:

Address Line 2:

City:

State:

Zip / Postal Code: -

Mailing Address/PO Box (if different):

Address Line 1:

PO Box:

City:

State:

Zip / Postal Code: -

Attorney(s) for this Party

Last Name	Supreme Court No.	Delete
WILLIAMS	0001234	<input type="button" value="X"/>
Last Name:*	<input type="text"/>	
Supreme Court No.:*	<input type="text"/>	
Bar State:	Ohio	<input type="button" value="Add"/>

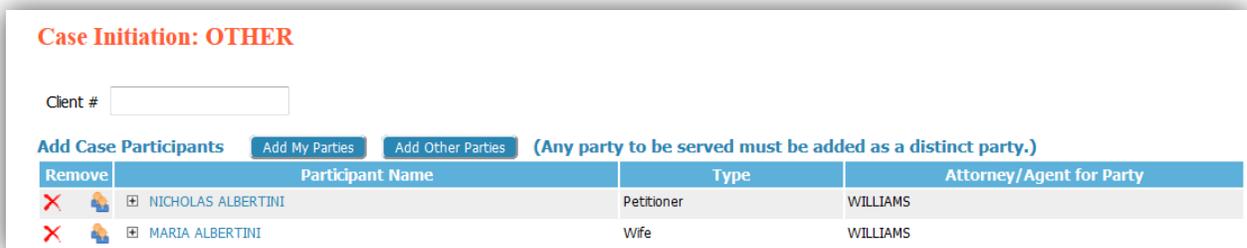
2. Enter party information.
3. When the "Add a Party" page is accessed via the "Add My Parties" button, the attorney information of the user's account is pre-populated on the upper right column of the Add My Parties page.
4. **Optional:** The user can add additional attorneys to the case by using the text fields in the "Attorneys for Party" section at the upper right of the screen. After filing in the information and clicking **Add**, the information entered will display directly below the user attorney information listed on the page.

- When the Add a Party page has been completed, click **Next**. The user will route back to the Case Initiation Back where he or she will view the list of users currently configured to be added to the case information upon submission.
- Click Add Other Parties. The “Add a Party” page allows the filer to add defendants or respondents.

Note: Fields marked with an asterisk are required by this system; however, this does not mean those are the only fields a user must fill in. This means these are the required fields to add a party on the case.

Note: Any party to be served must be added as a distinct party in the Add Party page.

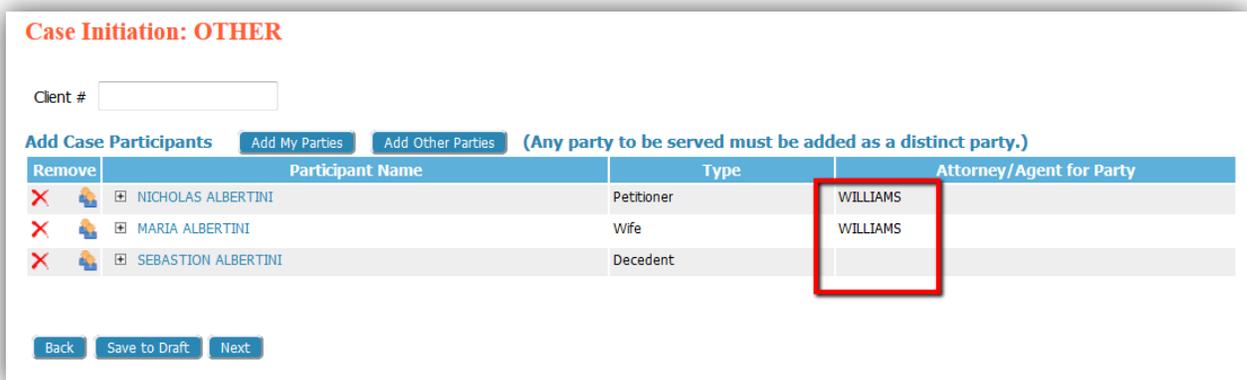
Figure 60: Case Initiation Listing Parties Represented by Account User



- Click **Add Other Parties**. The “Add a Party” page allows the filer to add defendants or respondents.

Note: The **Add Other Parties** button does not associate the filer to the parties they are adding nor does it add the attorney automatically.

Figure 61: Case Initiation Listing Other Parties

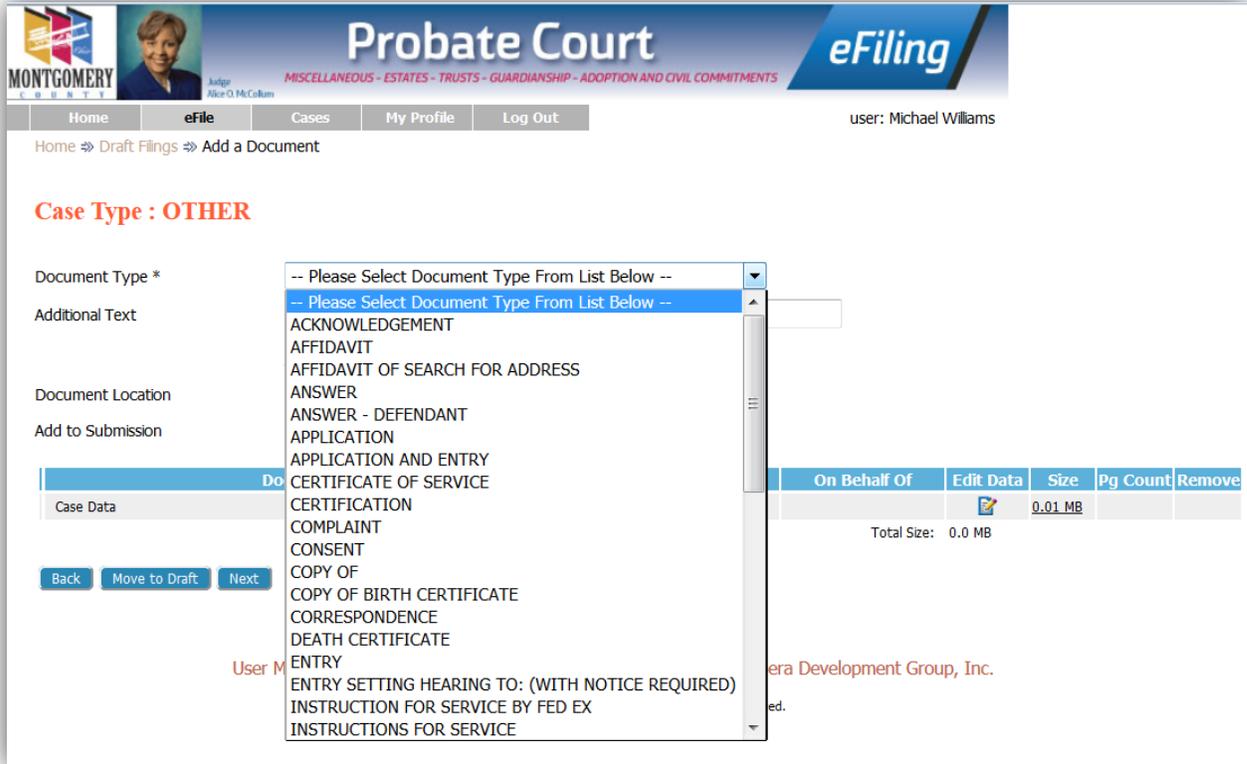


- Fill in the party information following the same steps as for the parties represented by the user. When all information is entered, click **Next**.

Note: It is generally expected that no attorneys will be listed for the “Add Other Parties” option.

9. From the Case Initiation page, when the party information has been added and is viewable on the table, click the **Next** button at the bottom left of the page.

Figure 62: Creating the Submission on the Case Initiation Page



10. From the dropdown, select the “Document Type.”

Note: Document types appear based on the type of case selected and whether the filing being created is for case initiation or for subsequent submission to an existing case.

11. Use the “Additional Text” field to further identify the document being submitted. This identification can be edited by the clerk. Upon clerk approval, the information in the Additional Text field is added to the case history.
12. Locate the document prepared the filer by clicking on **Browse**. The operating system “Open Dialog” will display.

Figure 63: Locating a Document

13. Browse to locate the desired document on the local computer, network, or jump drive. Select the document, and click on the **Open** button. This will return the filer to the “Add a Document” page with the file path to the document displayed in the “Document Location” field.
14. Click **Add**. If the document is large, the filer may see a message “UPLOADING DOCUMENT. PLEASE WAIT.” When the upload is complete, the user will see the document listed on the table just under the “Case Data” (Case Initiation information) listing.

Figure 64: Document Added

Document Type *

Additional Text

Acceptable File Format Type(s) (*.pdf)

Document Location No file selected.

Add to Submission

Document Name	View Document	On Behalf Of	Edit Data	Size	Pg Count	Remove
Case Data	form.xml			0.01 MB		
PETITION Albertini Petition	Petition.pdf	<input type="text"/>		0.01 MB	2	

Total Size: 0.01 MB

Note: Multiple documents can be submitted in a single filing by following the add documents steps above for each document to be included in the filing.

14. Some document types, such as Notice of Case Association for Pro Se filers, require additional information (and may not require the user to browse for a document to upload). If this is so, clicking **Add** will cause a screen to display requesting the additional information. This system generated form is referred to as a “Document Form.” Fill out the displayed form as completely as possible, and click **Next**.

Figure 65: On Behalf of Drop-down



15. Before moving off the Add a Document page, the filer must select a party from the “On Behalf of” dropdown for each document type added to the submission. After selecting the party name, click **Add**.

Figure 67: Incorrect Document File Format

Case Type : OTHER

Document Type *

Additional Text

Acceptable File Format Type(s) (*.pdf)

Document Location No file selected.

Add to Submission

The file is not an acceptable format. It must be of type pdf

Document Name	View Document	On Behalf Of	Edit Data	Size	Pg Count	Remove
Case Data	form.xml			0.01 MB		
PETITION Albertini Petition	Petition.pdf	NICHOLAS ALBERTINI:Petitioner		0.01 MB	2	

16. Each time a document is added, the document entry is displayed in the lower section of the page. The user can verify the document type, the additional text, the on behalf of, the size of the document, and the page count for each entry. Additionally, the total submission size is listed.

Figure 68: List of Added Documents

Montgomery County Probate Court eFiling
 Judge Alice O. McCollum
 MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS
 user: Michael Williams

Home eFile Cases My Profile Log Out

Draft Filings => Add a Document

Case Type : OTHER

Document Type *

Additional Text

Acceptable File Format Type(s) (*.pdf)

Document Location No file selected.

Add to Submission

Document Name	View Document	On Behalf Of	Edit Data	Size	Pg Count	Remove
Case Data	form.xml			0.01 MB		
PETITION Albertini Petition	Petition.pdf	NICHOLAS ALBERTINI:Petitioner		0.01 MB	2	
MOTION Motion on behalf of Nicholas Albertini	MOTION.pdf	NICHOLAS ALBERTINI:Petitioner		0.02 MB	2	

Total Size: 0.03 MB

17. **Optional:** Click the “View Document” link of the entry to verify the correct document was selected and uploaded.
18. **Optional:** Click the “Edit Data” icon  (next to any listed document) to change the information entered associated with that document. If there is no information collected for that specific document, no “Edit Data” icon will be displayed.
19. **Optional:** If the filer happened to upload the wrong document, they can click on the “Remove Document” icon  under the “Remove” column. This will remove that document from the submission. Then add the correct document.
20. **Optional:** If the filer wishes to continue the filing at another time, click the **Move to Draft** button at the bottom left of the page. This action saves the filing to draft and routes the user to the Draft Filings page.

Note: Once the filer begins adding documents to the submission, the eFlex system auto-saves the filing to draft. However, prior to adding the first document, the filer must manually click **Save to Draft** to save any work completed before exiting the eFlex system or becoming inactive on the eFlex system for more than 30 minutes. Failure to manually save prior to adding a document could result in loss of any information added to the submission. For privacy and user protection purposes, the eFlex system has an auto-logout after 30 minutes of inactivity. Remaining active on the system is defined by clicking any action button such as **Add** or **Next** or clicking any link that routes a user to a new page. Typing in a text field is not considered being active on the system.

21. Once all documents have been added appropriately, to continue through submission to the court, click **Next**. The “Review and Approve Filing” page will display.

Submitting the Initial Filing

Once the filer has clicked **Next** from the “Add a Document” page, they are taken to the “Review and Approve” page. Here they can review and verify the data they have entered for this case as well as select the payment method, change filing information, or add and remove documents. There is also a box for entering special instructions to the clerk.

1. At the top of this page the filer will see the case type. Below that is an entry box reserved for the “Filer Reference No.” This is an optional field, and the number is what is used at the attorney firm to identify a specific client. This can be any combination of numbers, letters, and symbols, up to 30 characters in length. This optional information is for the filer’s convenience and is recorded in eFlex but is **not** recorded at the court as a permanent part of the record. Filers are not required to enter a filer reference number in order to submit the filing.

Figure 69: Fee Payment Requirement for Filing

Review and Approve Filing

Case Type : OTHER

Filer Ref No. ← **Filer Reference Number**

Estimated Fees: \$10.00 [Add Wallet Item](#)

Wallet Item: Test Visa - *1111

No Payment

Waiver/Exempt --exempt from paying court costs

Defer/Indigent --defer court costs or poverty affidavit filed

← **Payment Information**

Generated Case Data: [Change Case Data](#)

[View Data](#)

Document(s) to be Submitted: [Add/Remove Documents](#)

Document Name	View Document
PETITION Albertini Petition	Petition.pdf
MOTION Motion on behalf of Nicholas Albertini	MOTION.pdf

Special Filing Instructions for the Clerk:

[Back](#) [Cancel \(Delete\)](#) [Move to Draft](#) [Submit the Filing](#)

2. The fee amount owed is displayed on the “Review and Approve” page. Payment of fees must be completed before the filing will be submitted to the court. The “Review and Approve” page gives the filer several payment options. Payment by credit card will most often be the appropriate selection and is, therefore, listed first.
3. In some cases, a waiver of immediate payment or a deferment of payment may be the appropriate option to choose. Make sure to include appropriate documentation to support any deferment option that may have been selected. Do not select waivers or deferments to avoid payment.

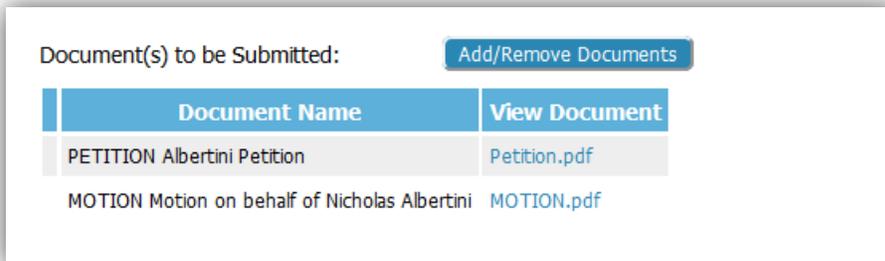
4. **Optional:** From the “Review and Approve” page, the filer can also go back to change the case information, which includes the party information, by clicking on the **Change Case Data** button. (Refer to previous instructions to add or remove parties.)

Figure 70: Changing Filing Information



5. **Optional:** The filer can go back to change the documents they have included in this submission by clicking the **Add/Remove Documents** button. This will re-direct the filer to the “Add a Document” page. (Refer to previous instructions to add or remove documents.) The filer can also click the **Back** button at the bottom of the “Review and Approve” page to go back to the “Add a Document” page.

Figure 71: Adding Removing, or Viewing Documents



6. **Optional:** The filer is able to verify the correct documents have been uploaded by clicking the file name link listed under the View Documents column.
7. **Optional:** The filer can cancel and discard this submission by clicking on the **Cancel (Delete)** button. Clicking **Cancel (Delete)** is a permanent action. After the filer clicks **OK** in the warning dialog box, the information previously entered cannot be retrieved.

Figure 72: Moving Filing to Drafts

Review and Approve Filing

Case Type : OTHER

Filer Ref No.

Estimated Fees: \$10.00 Add Wallet Item

Wallet Item: Test Visa - *1111

No Payment

Waiver/Exempt --exempt from paying court costs

Defer/Indigent --defer court costs or poverty affidavit filed

Generated Case Data: Change Case Data

[View Data](#)

Document(s) to be Submitted: Add/Remove Documents

Document Name	View Document
PETITION Albertini Petition	Petition.pdf
MOTION Motion on behalf of Nicholas Albertini	MOTION.pdf

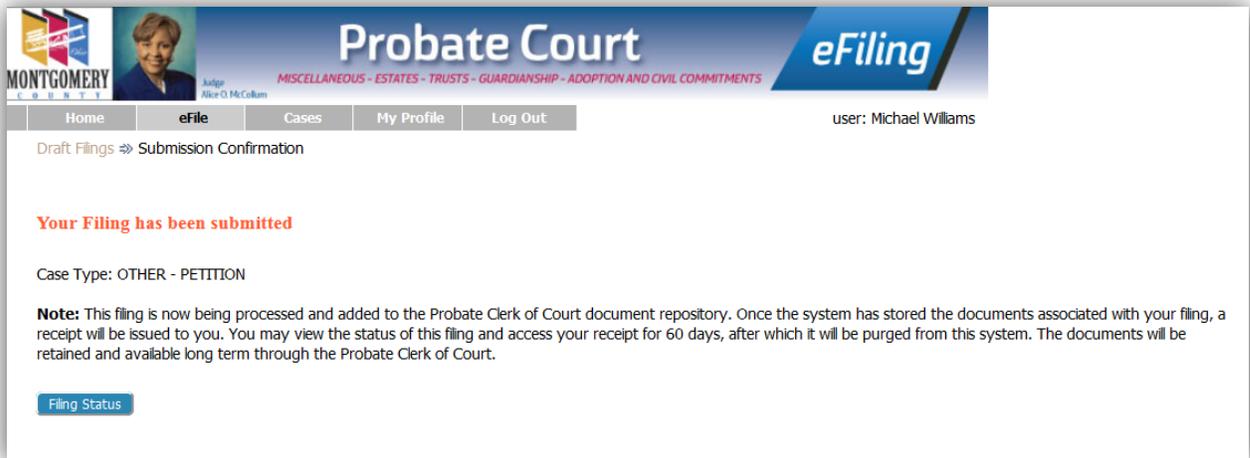
Special Filing Instructions for the Clerk:

Back
Cancel (Delete)
Move to Draft
Submit the Filing

8. **Optional:** The filer can leave the submission in draft state and finish it later by clicking on the **Move to Draft** button.
9. After reviewing the information and determining to move forward with the submission, click **Submit the Filing**.
10. A pop-up dialog box will ask the user to verify that they want to submit to the court. Click **OK**. This action routes the filer to the "Submission Confirmation" page. When this message

is displayed, it means the payment was successful and the submission is being transferred for review.

Figure 73: Filing Submitted Message



11. The filer should click on the **Filing Status** button if they wish to review the status of their submission. The status may take a few minutes to update. If the filer continues to refresh the status page by clicking **Go**, they will see the status of their submission change. “Awaiting Approval” means payment is processed, the filing has been received by the court’s servers, and the submission is waiting to be recorded. When the submission has completed all the steps at the court, the submission will have a “Filed” status. If the filer sent in a “Proposed Order,” a “Filed, Presented to Judge” status does not mean the proposed order is accepted; it simply means the proposed order has reached the point where a judge can review the document.

Figure 74: Filing Status

Montgomery Probate Court eFiling
 Judge: Alice O. McCollum
 MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS

Home eFile Cases My Profile Log Out user: Michael Williams

My Filings

My Filings

Michael Williams Filings

Report Criteria:

View Filings Between: 05/01/2016 AND []

Filing ID: [] Case Number: [] Filer Ref No.: [] Status: All

Go Clear Search

My Filings Between 05/01/2016 and Today

Delete Filings per page: 50

<input type="checkbox"/>	Filing ID	Filer Ref No.	Case Title	Case Number	Date Submitted	Document Type	Status
<input type="checkbox"/>	1450				06-16-2016:12:33:34 PM	PETITION	Awaiting Approval
<input type="checkbox"/>	1429		THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	06-01-2016:08:11:31 PM	MEMORANDUM	Filed
<input type="checkbox"/>	1340		THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	05-18-2016:12:26:07 PM	REQUEST	Filed
<input type="checkbox"/>	1335		THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	05-18-2016:11:20:11 AM	PROPOSED ENTRY	Filed-Presented to Judge

12. Click the **Home** link on the menu bar or any other link to go to a different point in the eFiling application.

To View or Print Documents Associated With a Case

The “My Filings” page will allow the filer to access documents that were filed with the case for either viewing or printing purposes.

1. To access the “My Filings” page at a time other than immediately after submission, select **Filing Status** from the “Home” page or **eFile>My Filings** from the menu bar at the top of any page.
2. The “My Filings” page will appear, allowing the filer to either search for the case they need or select from a list. Once located, click on the particular filing’s link under the “Status” column, and the filer will be directed to the “Filing Status” page for that submission.

Figure 75: Filing Status Page

Home ⇒ My Filings ⇒ Filed-Presented to Judge

Filing Status

Status: Filed-Presented to Judge 06-16-2016:01:01:00 PM

Note from Clerk/Court:

Filer Interface ID: 1534

Clerk Interface ID: 1301

Submitted By: Williams, Michael

Date Submitted: 06-16-2016:12:53:09 PM

Case Title: THE CIVIL CASE OF LAURENE ZAPOROZHETZ

Case Number: 2015MSC00069

Case Type: SALE OF REAL ESTATE - ESTATE

Note: This filing will be removed from eFiling on 08-15-2016

Document Name	View Document
MOTION Motion Zaporozhetz	MOTION.pdf
Receipt	receipt.html
MOTION MOTION ZAPOROZHETZ	MOTION.pdf
Form Data	Generated XML Data

Approved By	Status	Date Approved
Williams, Michael	Signed	06-16-2016:12:53:09 PM

Filing Status

- The documents originally submitted with the filing may be viewed by clicking the first link associated with the document under “View Documents.” These documents do not have the court’s time and date stamp.
- If the submission being viewed has reached a status of “Filed” or “Filed-Presented to Judge,” the Filing Status details page will include a second copy of each document that was part of the submission. Clicking on the second listing of a particular document listed under the “View Documents” column will open a File-Stamped version of the document.
- The filer may also choose to open the “Receipt” listed under the original documents. This document confirms the acceptance of the submission to the court and includes all pertinent reference information to both the case and the payment made.

Figure 76: Court Generated Receipt

Confirmation of Receipt	
The following information confirms acceptance of your filing by MONTGOMERY COUNTY PROBATE	
Case Information	
Case Caption	THE CIVIL CASE OF LAURENE ZAPOROZHETZ
Case Number	2015MSC00069
Case Type	SALE OF REAL ESTATE - ESTATE
Judge	ARVIN SETH MILLER
Court Name	MONTGOMERY COUNTY PROBATE
Filing Information	
Filer	Michael Williams
Official File Stamp	
Filer Interface Id	1534
Clerk Interface Id	1301
Payment Information	
Payment Method	Payment Collected (\$5.12) - Authorization Code: 358852
Charges	\$5.00 Filing Fees
	\$0.12 Payment Gateway Service Fee
Total	\$5.12
Documents	
MOTION.pdf	MOTION MOTION ZAPOROZHETZ

Note: The information referenced on the My Filings and Filing Status details page is subject to automatic clean out by a time configured by the court, generally not less than 90 days from the time of submission. The eFlex system is not a permanent storage system. Once the filer has opened the receipt, he or she should download or print it for his or her records. Receipts do not appear anywhere else in the eFlex system. File-stamped documents can be downloaded or printed from the Filing Status page, but they can also be accessed through the Full Case History or possibly on the Notifications page.

eFiling to An Existing Case

Filing to an existing case is similar to filing a new case.

Adding a Document to an Existing Case

1. Click **File to Existing Case** on the home page or select **eFile > Existing Case** from the menu bar on the top of any page. The "My Cases" page will appear.

Figure 77: Existing Cases

The screenshot displays the 'My Cases' section of the Probate Court eFiling system. At the top, there is a navigation bar with 'Home', 'eFile', 'Cases', 'My Profile', and 'Log Out'. The user is identified as 'Michael Williams'. Below the navigation bar, the 'My Cases' section includes a search area with a 'Case Number' input field, an 'eFile' button, and 'History' and 'Service List' buttons. A red arrow points to the 'Case Number' field with the label 'Case Number Search'. Below the search area, there is a 'Search Cases' button. A table of cases is displayed below, with columns for 'Case Title', 'Case Number', 'eFile', 'Case Type', 'Judge', 'Certificate', and 'Inactive'. A red arrow points to the 'eFile' link in the second row of the table with the label 'eFile Link'. The table contains the following data:

Case Title	Case Number	eFile	Case Type	Judge	Certificate	Inactive
THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	eFile	CIVIL/MISCELLANEOUS	JOSEPH GALLAGHER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF KENEDI REED	2015MSC00100	eFile	CIVIL/MISCELLANEOUS	DAVID A. WHITE	Service List	<input type="checkbox"/>
THE CIVIL CASE OF CHRISTOPHER GOTTSCHLICH	2015MSC00089	eFile	SALE OF REAL ESTATE - GUARDIANSHIP	JOSEPH GALLAGHER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	eFile	SALE OF REAL ESTATE - ESTATE	ARVIN SETH MILLER	Service List	<input type="checkbox"/>
THE CIVIL CASE OF JENYSIS WHITE	2015MSC00054	eFile	CIVIL/MISCELLANEOUS	DAVID A. WHITE	Service List	<input type="checkbox"/>

- The filer can search for a specific case using the “Case Number” entry field or can select a case to file on from the list of cases displayed. To search for a specific case, enter the case number and click **eFile**.
- Optional:** Find the appropriate case title in the list of cases displayed. To the right of the case title, click the “eFile” link.

Note: Entering a case number and clicking **History** will display the Full Case History as will clicking the case number link listed in the table at the bottom of the My Cases page.

- From either method of selecting a specific case on which to eFile, the “Add a Document” page will display. The “Add a Document” page allows the filer to distinguish between an existing case and a new case by means of a yellow banner near the top of the page. An existing case will have a yellow banner with the case number and case title displayed. A case initiation filing has no such banner.

Figure 78: Yellow Banner on Existing Case Add a Document Page

MONTGOMERY COUNTY PROBATE COURT
 Judge Alice O. McCollum
Probate Court
 MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS
eFiling

Home eFile Cases My Profile Log Out user: Michael Williams

Home ⇒ My Cases ⇒ Add a Document

Case Number : 2016MSC00019 Case Title : THE CIVIL CASE OF ALAN ANDERSON

Document Type * -- Please Select Document Type From List Below --

Additional Text

Acceptable File Format Type(s) (*.pdf)

Document Location Browse... No file selected.

Add to Submission Add

Document Name	View Document	On Behalf Of	Edit Data	Size	Pg Count	Remove
Back Move to Draft Next						

To submit a filing to an existing case, the filer will follow the same steps as adding a submission to a case initiation.

Understanding Filing Status

Whenever a user e-Files something to the court, the status of the filing is updated to reflect its progress. Each filing will be updated with various different statuses. Some happen so quickly that filers may not see all the status changes. The “My Filings” page displays the status of each submission as it is updated until the final status of “Accepted” has been posted. Users may use the **Go** button near the top of the page to “Refresh” the page view. A filing can have the status of:

- **Sending** - The submission is prepared and sent for clerk review.
- **Received** - The submission has received a time stamp and will be placed in a queue for further processing.
- **Awaiting Approval** - The submission is in a queue for further processing.
- **Filed** - The Clerk has approved submission, and it is being processed. Be patient.
- **Receipt Pending** - An error occurred in communications. Call the e-Filing administrator.
- **Rejected Not Filed** - Submission was denied.
- **Filed** - No further action. The filer should look at their case history or receipt of the submission to download signed documents and check for notes from the Clerk.

- **Resubmitted** - This submission was “Rejected,” and the filer used the old submission to create a new submission. The status of this submission has no future value, and the filer needs to look at the new submission status.

Each entry in the list represents the status of a filing.

Each entry on the “My Filings” page is temporary and is deleted after a certain period of time. The period of time this information remains is configurable by the eFiling administrator, but is usually not less than 90 days.

Note: Check each entry. Although a status is complete, there may still be a note from the Clerk of the Court informing the filer of some condition. Be sure to check each receipt.

To check the status of submissions:

1. From the Home page, click **My Filings** or click **eFile > My Filings** from the menu bar at the top of any page.
2. **Optional:** Filter the list by using the calendar icons to select a starting and ending date. Then click **Go**. If the end date is left blank, the system default is today’s date.

Figure 79: Selecting Start and End Dates

The screenshot shows the 'My Filings' interface for Michael Williams. It includes a 'Report Criteria' section with a calendar for selecting dates (currently showing April 2016) and a table of filings. The table has columns for Filing ID, Case Number, Date Submitted, Document Type, and Status. A 'Resubmit' button is visible next to filing ID 1156.

Filing ID	Case Number	Date Submitted	Document Type	Status
1534	2015MSC00069	06-16-2016:12:53:09 PM	MOTION	Filed-Presented to Judge
1450		06-16-2016:12:33:34 PM	PETITION	Awaiting Approval
1429	2015MSC00069	06-01-2016:08:11:31 PM	MEMORANDUM	Filed
1340	2015MSC00069	05-18-2016:12:26:07 PM	REQUEST	Filed
1335	2016MSC00019	05-18-2016:11:20:11 AM	PROPOSED ENTRY	Filed-Presented to Judge
1333	2016MSC00019	05-18-2016:11:08:23 AM	PROPOSED ENTRY	Filed-Presented to Judge
1326	2015MSC00100	05-17-2016:06:36:42 PM	COMPLIANCE	Filed-Presented to Judge
1168	2015MSC00100	05-02-2016:05:55:26 PM	AFFIDAVIT	Filed
1156	2015MSC00089	04-29-2016:05:37:21 PM	AFFIDAVIT	Rejected Not Filed
1155	2015MSC00089	04-29-2016:05:31:08 PM	AGREED	Filed

3. Click the “+” symbol in the “Filing ID” column to display the documents associated with the filing.

Figure 80: Displaying Document Associated with Filing

My Filings

Michael Williams Filings

Report Criteria:

View Filings Between: 04/25/2016 AND

Filing ID: Case Number: Filer Ref No.: Status: All

My Filings Between 04/25/2016 and Today

Filings per page: 50

Filing ID	Filer Ref No.	Case Title	Case Number	Date Submitted	Document Type	Status	
1534		THE CIVIL CAS OF LAURENE ZAPOROZHETZ	2015MSC00069	06-16-2016:12:53:09 PM	MOTION	Fled-Presented to Judge	
		MOTION Motion Zaporozhetz + Receipt + MOTION MOTION ZAPOROZHETZ					
1450				06-16-2016:12:33:34 PM	PETITION	Awaiting Approval	

4. **Optional:** Click the document name link that appears when the filer clicks the “+” symbol to view/download the document.
5. Click the filing “Status” on the right to display additional details about the filing. This will include information such as the time-stamp on the submission.

Figure 81: Displaying Additional Details of a Filing

My Filings

Michael Williams Filings

Report Criteria:

View Filings Between: 04/25/2016 AND

Filing ID: Case Number: Filer Ref No.: Status: All

My Filings Between 04/25/2016 and Today

Filings per page: 50

Filing ID	Filer Ref No.	Case Title	Case Number	Date Submitted	Document Type	Status
1534		THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	06-16-2016:12:53:09 PM	MOTION	Fled-Presented to Judge
1450				06-16-2016:12:33:34 PM	PETITION	Awaiting Approval
1429		THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	06-01-2016:08:11:31 PM	MEMORANDUM	Filed
1340		THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	05-18-2016:12:26:07 PM	REQUEST	Filed
1335		THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	05-18-2016:11:20:11 AM	PROPOSED ENTRY	Fled-Presented to Judge
1333		THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	05-18-2016:11:08:23 AM	PROPOSED ENTRY	Fled-Presented to Judge
1326		THE CIVIL CASE OF KENEDI REED	2015MSC00100	05-17-2016:06:36:42 PM	COMPLIANCE	Fled-Presented to Judge
1168	CEY 5/2/16	THE CIVIL CASE OF KENEDI REED	2015MSC00100	05-02-2016:05:55:26 PM	AFFIDAVIT	Filed
1156		THE CIVIL CASE OF CHRISTOPHER GOTTSCHLICH	2015MSC00089	04-29-2016:05:37:21 PM	AFFIDAVIT	Rejected Not Filed <input type="button" value="Resubmit"/>
1155		THE CIVIL CASE OF CHRISTOPHER GOTTSCHLICH	2015MSC00089	04-29-2016:05:31:08 PM	AGREED	Filed

Number of Filings: 10 - Message from the court/clerk

1

6. **Optional:** On the “Filing Status” page that appears after clicking the link, view/download the document by clicking the “View Document” link.

Figure 82: Filing Status Page

Home ⇒ My Filings ⇒ Filed-Presented to Judge

Filing Status

Status: Filed-Presented to Judge 06-16-2016:01:01:00 PM

Note from Clerk/Court:

Filer Interface ID: 1534

Clerk Interface ID: 1301

Submitted By: Williams, Michael

Date Submitted: 06-16-2016:12:53:09 PM

Case Title: THE CIVIL CASE OF LAURENE ZAPOROZHETZ

Case Number: 2015MSC00069

Case Type: SALE OF REAL ESTATE - ESTATE

Note: This filing will be removed from eFiling on 08-15-2016

Document Name	View Document
MOTION Motion Zaporozhetz	MOTION.pdf
Receipt	receipt.html
MOTION MOTION ZAPOROZHETZ	MOTION.pdf
Form Data	Generated XML Data

Approved By	Status	Date Approved
Williams, Michael	Signed	06-16-2016:12:53:09 PM

Filing Status

Handling a “Rejected” Status

If a submission is “Rejected,” the receipt will include a reason field. Although some reasons are entered automatically by the system, for example, if one of the documents contained a virus, the clerk typically types in the reason for the rejection.

1. When a submission is “Rejected,” a **Resubmit** button appears next to the status.

Figure 83: Resubmit Button for a Rejected Filing

My Filings

Michael Williams Filings

Report Criteria:

View Filings Between: 04/25/2016 AND

Filing ID: Case Number: Filer Ref No.: Status:

My Filings Between 04/25/2016 and Today

Filings per page: 50

<input type="checkbox"/>	Filing ID	Filer Ref No.	Case Title	Case Number	Date Submitted	Document Type	Status
<input type="checkbox"/>	1534		THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	06-16-2016:12:53:09 PM	MOTION	Filed-Presented to Judge
<input type="checkbox"/>	1450				06-16-2016:12:33:34 PM	PETITION	Awaiting Approval
<input type="checkbox"/>	1429		THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	06-01-2016:08:11:31 PM	MEMORANDUM	Filed
<input type="checkbox"/>	1340		THE CIVIL CASE OF LAURENE ZAPOROZHETZ	2015MSC00069	05-18-2016:12:26:07 PM	REQUEST	Filed
<input type="checkbox"/>	1335		THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	05-18-2016:11:20:11 AM	PROPOSED ENTRY	Filed-Presented to Judge
<input type="checkbox"/>	1333		THE CIVIL CASE OF ALAN ANDERSON	2016MSC00019	05-18-2016:11:08:23 AM	PROPOSED ENTRY	Filed-Presented to Judge
<input type="checkbox"/>	1326		THE CIVIL CASE OF KENEDI REED	2015MSC00100	05-17-2016:06:36:42 PM	COMPLIANCE	Filed-Presented to Judge
<input type="checkbox"/>	1168	CEY 5/2/16	THE CIVIL CASE OF KENEDI REED	2015MSC00100	05-02-2016:05:55:26 PM	AFFIDAVIT	Filed
<input type="checkbox"/>	1156		THE CIVIL CASE OF CHRISTOPHER GOTTSCHLICH	2015MSC00089	04-29-2016:05:37:21 PM	AFFIDAVIT	Rejected Not Filed <input type="button" value="Resubmit"/>
<input type="checkbox"/>	1155		THE CIVIL CASE OF CHRISTOPHER GOTTSCHLICH	2015MSC00089	04-29-2016:05:31:08 PM	AGREED	Filed

Number of Filings: 10 - Message from the court/clerk

1

2. Click **Resubmit** to automatically create a new submission based on the previously rejected submission.
3. Change what was rejected by either deleting the document in question or correcting the information entered.

Note: The “Filing Status” screen is not where the filer should look for case information; instead, click **My Cases** on the “Home” page.

Draft Submissions

The “Draft” feature acts as a backup if the filer is disconnected from the internet. Whenever the filer begins creating a new submission, eFlex records data each time the filer advances to the next screen, including any document data the filer has loaded. If the internet connection goes down, the system creates a draft of the submission as long as the filer has advanced as far as the “Add a Document” page, where the automatic save feature is activated.

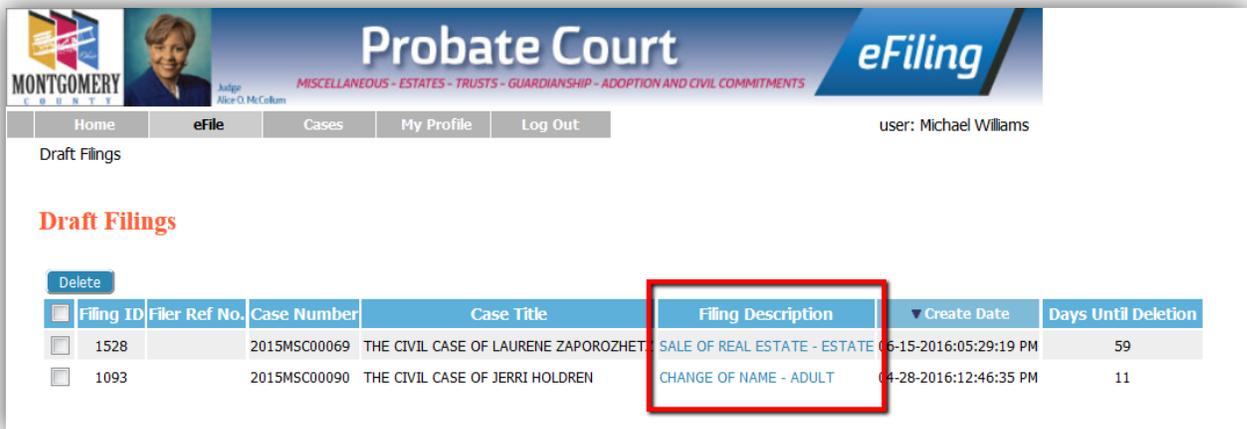
The filer can also perform a manual save by clicking **Save to Draft** on the case initiation page after party information has been added to the submission. Additionally, the filer can click **Move to Draft** on the Add a Document page or the Review and Approve Filing page. When the filer is back online, they can

continue the filing process where they left off. Each time the filer log out, they will be alerted if they have any partially completed submissions.

Working On a Draft Filing

1. Click **eFile > Draft Filings** on the menu bar to see a list of partially completed submissions.
2. Click the Filing Description hyperlink to return re-open the filing. If this was a case initiation, the filer will return to the “Add a Document” page for a new case. If this was a filing on an existing case, then the filer will return to the “Add a Document” page with the yellow banner.

Figure 84: List of Draft Filings



The screenshot shows the 'Draft Filings' page in the Probate Court eFiling system. The page header includes the Montgomery County logo, a judge's portrait (Judge Alice O. McCann), and the text 'Probate Court MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS eFiling'. The user is identified as Michael Williams. A 'Delete' button is visible above the table. The table has columns for Filing ID, Filer Ref No., Case Number, Case Title, Filing Description, Create Date, and Days Until Deletion. Two rows of draft filings are listed, with the 'Filing Description' column highlighted by a red box.

Filing ID	Filer Ref No.	Case Number	Case Title	Filing Description	Create Date	Days Until Deletion
1528		2015MSC00069	THE CIVIL CASE OF LAURENE ZAPOROZHET	SALE OF REAL ESTATE - ESTATE	06-15-2016:05:29:19 PM	59
1093		2015MSC00090	THE CIVIL CASE OF JERRI HOLDREN	CHANGE OF NAME - ADULT	04-28-2016:12:46:35 PM	11

3. Continue with the submission.

Note: When clicking the Filing Description, the default is to always route the user to the “Add a Document” page. If the filer is working on a new case and needs to back up to the “Case Initiation” page, click the “Edit Data” icon to the right of the “Case Data” listing. Alternately, the filer can click the **Back** button on the “Add a Document” page. Either of these actions will then allow the filer to change the party information or add additional parties to the case. However, the case category and case type cannot be changed.

Figure 85: "Add a Document" Page

MONTGOMERY Probate Court eFiling
 MISCELLANEOUS - ESTATES - TRUSTS - GUARDIANSHIP - ADOPTION AND CIVIL COMMITMENTS
 Judge: Alice O. McCann user: Michael Williams

Home eFile Cases My Profile Log Out

Draft Filings ⇒ Add a Document

Case Type : CHANGE OF NAME - ADULT

Document Type *

Additional Text

Acceptable File Format Type(s) (*.pdf)

Document Location No file selected.

Add to Submission

Document Name	View Document	On Behalf Of	Edit Data	Size	Pg Count	Remove
Case Data	form.xml		<input type="button" value="Edit Data"/>	0.01 MB		

Total Size: 0.0 MB

Resuming Work on a Draft Filing

Many times filers forget they already redid the submission. The filer can delete entries on the Draft Filings page if they no longer need the information or if they completed the submission by starting over.

1. Select the draft filing to be deleted by clicking on the checkbox to the left of the listing. Click the "Delete" button.
2. Click "OK" when asked to proceed with the deletion.

Figure 86: Deleting a Draft Filing

The screenshot shows the 'Draft Filings' page in the Probate Court eFiling system. A modal dialog box is open, asking 'Delete?' with 'OK' and 'Cancel' buttons. A red arrow points from the 'Delete' button in the table below to the dialog box.

Filing ID	Filer Ref No.	Case Number	Case Title	Filing Description	Create Date	Days Until Deletion
<input checked="" type="checkbox"/>	1539			CHANGE OF NAME - ADULT	06-16-2016:07:46:40 PM	60
<input type="checkbox"/>	1528	2015MSC00069	THE CIVIL CASE OF LAURENE ZAPOROZHETZ	SALE OF REAL ESTATE - ESTATE	06-15-2016:05:29:19 PM	59
<input type="checkbox"/>	1093	2015MSC00090	THE CIVIL CASE OF JERRI HOLDREN	CHANGE OF NAME - ADULT	04-28-2016:12:46:35 PM	11

- Each time the filer logs off the e-Filing system, if there are entries in draft status, the filer will be notified that they have entries in draft, and they will have to answer whether they want to exit or not.

Figure 87: Incomplete Filing

The screenshot shows the 'Logout' page in the Probate Court eFiling system. A confirmation dialog box asks 'You have incomplete filings. Are you sure you want to log out?' with 'Yes' and 'No' buttons. Below the dialog is a table of draft filings.

Filing ID	Filer Ref No.	Case Number	Case Title	Filing Description	Create Date	Days Until Deletion
1528		2015MSC00069	THE CIVIL CASE OF LAURENE ZAPOROZHETZ	SALE OF REAL ESTATE - ESTATE	06-15-2016:05:29:19 PM	59
1093		2015MSC00090	THE CIVIL CASE OF JERRI HOLDREN	CHANGE OF NAME - ADULT	04-28-2016:12:46:35 PM	11

- Clicking “Yes” completes the log out process. Clicking “No” routes the user back into an active draft filings page from which he can navigate to complete one or more draft filings.

Appendix A: Creating a PDF and Other Document Display Information

PDF Basics

PDF (Portable Document Format) is a popular format created by Adobe Systems Incorporated. Documents using this format can be read by Adobe Reader®, a free application available from the Adobe website. This type of document is considered a final form document because it is not designed to be edited. It is fixed and appears the same on nearly every machine using Adobe Reader. Because the document looks the same regardless of the machine, the court's policy is to send documents as PDF documents except for specifically identified documents such as "Proposed Orders." When saving to a PDF format, if there is a choice as to type of PDF, select "PDF A" as this creates a searchable PDF. A PDF document has the extension ".pdf" appended to the file name.

If the filer has a PDF printer driver installed, they can create PDF documents directly from Microsoft® Word. Some word processing applications, such as Corel® WordPerfect®, include a PDF printer driver as part of the application. There are several vendors that sell PDF printer drivers.

Creating Documents

For "Proposed Orders" or any other document types specifically identified by the Mahoning County, they should prepare these documents in a word processor and submit them in one of the following formats:

- Microsoft Word 2007 and Up (.docx)
- Microsoft Word 98 - 2003 (.doc)

To create original documents, whether "Proposed Orders" or another document, the filer will need a word processing application, such as Microsoft Word, WordPerfect, or another word processor. They need to use standard fonts when they are creating the original document. Times New Roman or Arial fonts are common and generally convert to PDF consistently. The font select also needs to be a "TrueType" font. Selecting standard fonts will help ensure the document formatting converts correctly.

Note: All documents eventually will be converted to a PDF file. "Proposed Orders" submitted in a word processing format will be converted by the court later in the e-Filing process.

Except for "Proposed Orders," after the filer creates a document, they need to convert it from the word processing format to Adobe PDF file.

If the user is working in Microsoft 2007 or newer version of Microsoft Word, there is a built in Acrobat pdf creator included, generally on a tab on the menu bar. Many users of other word processing programs will install a PDF printer driver as that is the common way to create PDF documents. There are some free PDF printer drivers as well as products the filer can purchase. Adobe Acrobat Standard or Pro editions include printer drivers. It doesn't matter what operating system or word processing

application the filer uses to create original documents as long as they can convert the finished document to a PDF document.

Proposed Orders must be submitted in Microsoft Word format (.docx or .doc). When the court is finished editing the document the court will convert from the Microsoft Word format to PDF.

Including Paper Exhibits

With a submission the filer may need to include copies of paper documents such as a copy of a contract, a copy of a bounced check, or some other item. The filer must scan these types of paper exhibits into PDF to e-File them. To do this the filer must have access to a scanner. In the scanner control dialog box, be sure to select the "Scan to PDF" option.

Pay attention to court requirements for file size, color, and resolution. The Court's system requests that filers use black-and-white settings with a low resolution (300 dpi) resulting in 25 to 50 KB per page in size. Using color adds to the size of the file, so they should only scan using color settings when color is a vital element of the exhibit. If the scan includes color, and then lower the resolution enough to reduce the file size but not to destroy the ability to view the image. See the scanner's user documentation for more information.