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Establishing Wallets

Setting up the Financial Administrator

Request an Eflex Account

- Go to https://efiling.mcohio.org
- Click Request an Account
- Select – I accept the terms of the user agreement
- Click Submit
- Use the drop down arrow and select your Company Name

Select a company

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

- Existing Company Name: Montgomery County Common Pleas Court, General Division
- New Company Name: 

[Cancel] [Submit]
Complete the following fields:

- **Filer Role:** Financial Administrator
- **Username**
- **Password**
- **Confirm Password**
- **First Name**
- **Last Name**
- **Phone Number**
- **Email Address**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td>Montgomery County Common Pleas Court, General Division</td>
</tr>
<tr>
<td>Filer Role</td>
<td>Financial Administrator</td>
</tr>
<tr>
<td>User Name</td>
<td>mccpfn</td>
</tr>
<tr>
<td>Password</td>
<td>**********</td>
</tr>
<tr>
<td>Confirm Password</td>
<td>**********</td>
</tr>
<tr>
<td>First Name</td>
<td>Lynn</td>
</tr>
<tr>
<td>Last Name</td>
<td>Cooper</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:cooper1@montcourt.org">cooper1@montcourt.org</a></td>
</tr>
</tbody>
</table>

- Click Submit
- Click OK to be brought back to the sign in page
- **The account must be approved before the Financial Administrator can set up accounts**
Financial Administrator – Adding the Wallet(s)

- Log In as Financial Administrator
- Click the Admin drop down menu
- Select Account Settings

- Click Add in the Wallet section
** We recommend a separate wallet for each payment method
Checking Accounts:

- Click Create E-Check Token
• Enter Payor Information

• Click Next
• Click “I agree to the terms and conditions”

• Click Next
- Verify Information
- Click Create Token
Click Finish
Credit Cards (Visa, MasterCard, Discover and American Express)

- Click Create Credit Card Token
- Enter Credit Card Billing Information

![Credit Card Billing Information Form]

**DO NOT USE THE & SIGN WHEN TYPING IN THE COMPANY – SPELL OUT AND**

- Click Next
• Click “I agree to the terms and conditions”

• Click Next
Click Create Token
• Click Finish
• Enter an Account Description

**Assign Account Settings**

The Financial Administrator will need to select and assign the attorneys to the checking account and/or the credit card created.

• From the Home Page - Click on Admin Drop Down
• Click on Account Settings
• Click Assign
- Check the boxes next to the Usernames you wish to have access to this method of payment

The username will now have the ability to use the accounts they have been given permissions to use. Each user will need to know the last four digits of the account in order submit a filing that requires money.

To remove permissions:
- Click on the Assign button for the account you wish to remove a user
- Uncheck the box of the user you are removing
- Click Save Changes
Delete a Wallet

- From the Home Page - Click on Admin Drop Down
- Click Account Settings
- Click Delete

- Click OK
- Click the Home button at the top of the screen to return to the Home page
Establishing a Personal Wallet

Personal Wallets are established under the profile settings of the individual user’s account.

- Sign into eFlex using the attorney’s username and password
- Click My Profile
- Select My User Profile
- Click Add under the Wallets Accounts
Checking Accounts:

- Click Create E-Check Token
Enter Payor Information

- First Name
- Middle Initial
- Last Name
- Payor Address
- Country
- State
- City
- Postal Code
- Phone
- Email Address
- Retype Email Address

Payment Information

Verification

Click Next
- Enter Payment Information
- Click “I agree to the terms and conditions”

- Click Next
- Verify Information
- Click Create Token
• Click Finish
Credit Cards (Visa, MasterCard, Discover and American Express)

- Click Create Credit Card Token
Enter Credit Card Billing Information

Click Next
• Click on Accept Terms

• Click Next
- Click Create Token
Click Finish
Using an Established Wallet

- Select the account to use
- Click Next
• Click Ok

![Message from webpage]

Your submission is complete. Click OK to file to the court.

OK Cancel

Home => New Case Filing: Court - Division => Submission Confirmation

Your Filing has been submitted

Case Type: Civil - Case Information Sheet

Note: This filing is now being processed and added to the Clerk of Court(s) document repository. Once eFile a receipt will be issued to you. You may view the status of this filing, and access your receipt for 60 days, after documents will be retained and available long term through the Clerk of Court(s).

Filing Status

• Click on Filing Status

Money Collected from Card or Checking Account after Submission has been Approved and Filed

Package Pending ➔ Packaged ➔ Received ➔ Awaiting Approval ➔ Filed

Receipt Pending – Package approved but submission experiencing technical problems at the Clerk’s Office – Clerk staff working on the issue and will contact the filer if necessary

Rejected - Submission was rejected by the Clerk's Office with a reason provided - no money has been collected
Receipt for Payments - Successful Submission

- Email sent from no-reply@heartlandcashier.com

PDF Payment Receipt

Rejected Submission
Email sent from montefiling@mcclerk.org with the reason for the rejection:

- **To:** L Cooper atty
- **From:** null
- **Date:** 2015-05-28 08:03:15.29
- **Subject:** Your electronic filing, Re: 123456 - Civil - Case Information Sheet, was rejected by Montgomery County Civil and Criminal.

**Case Type:** Civil
**Document Type:** Case Information Sheet
**Document Type:** Complaint
**Document Type:** Instructions for Service on a New Case

**Reason(s) for rejected:** Your submission was rejected because the parties added to eFlex do not match the parties on the Complaint. Please resubmit with the proper parties or with the proper Complaint.

Please note – The Filing Status Page will display the status for the submission as Rejected:

- Click Resubmit and fix the problem if possible
- The original submission time will be lost and the new submission time will be when the resubmitted package is received
- **No money collected on the original submission that was rejected** – only one payment will be collected when the new submission is approved