ELECTRONIC FILING - PAYMENT PROCESS

05/26/2015

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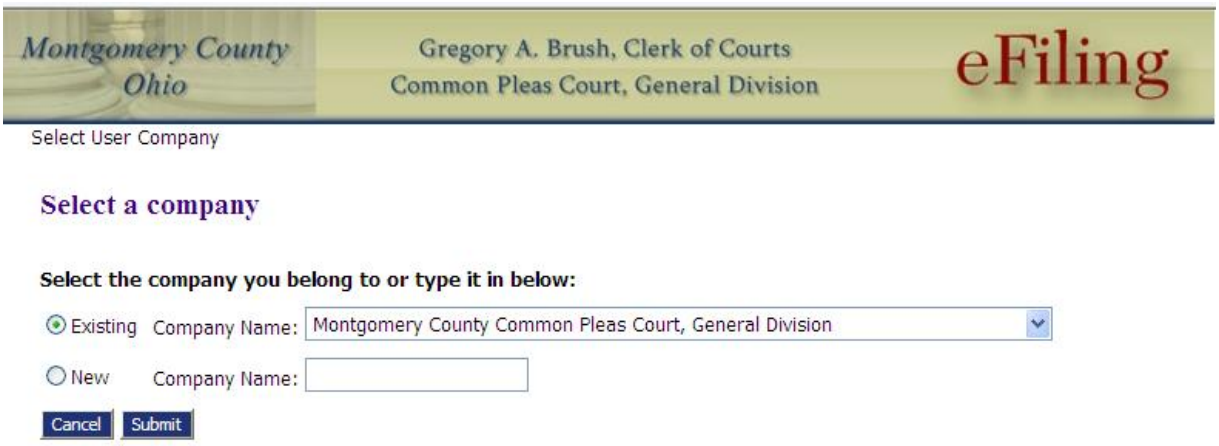
Establishing Wallets

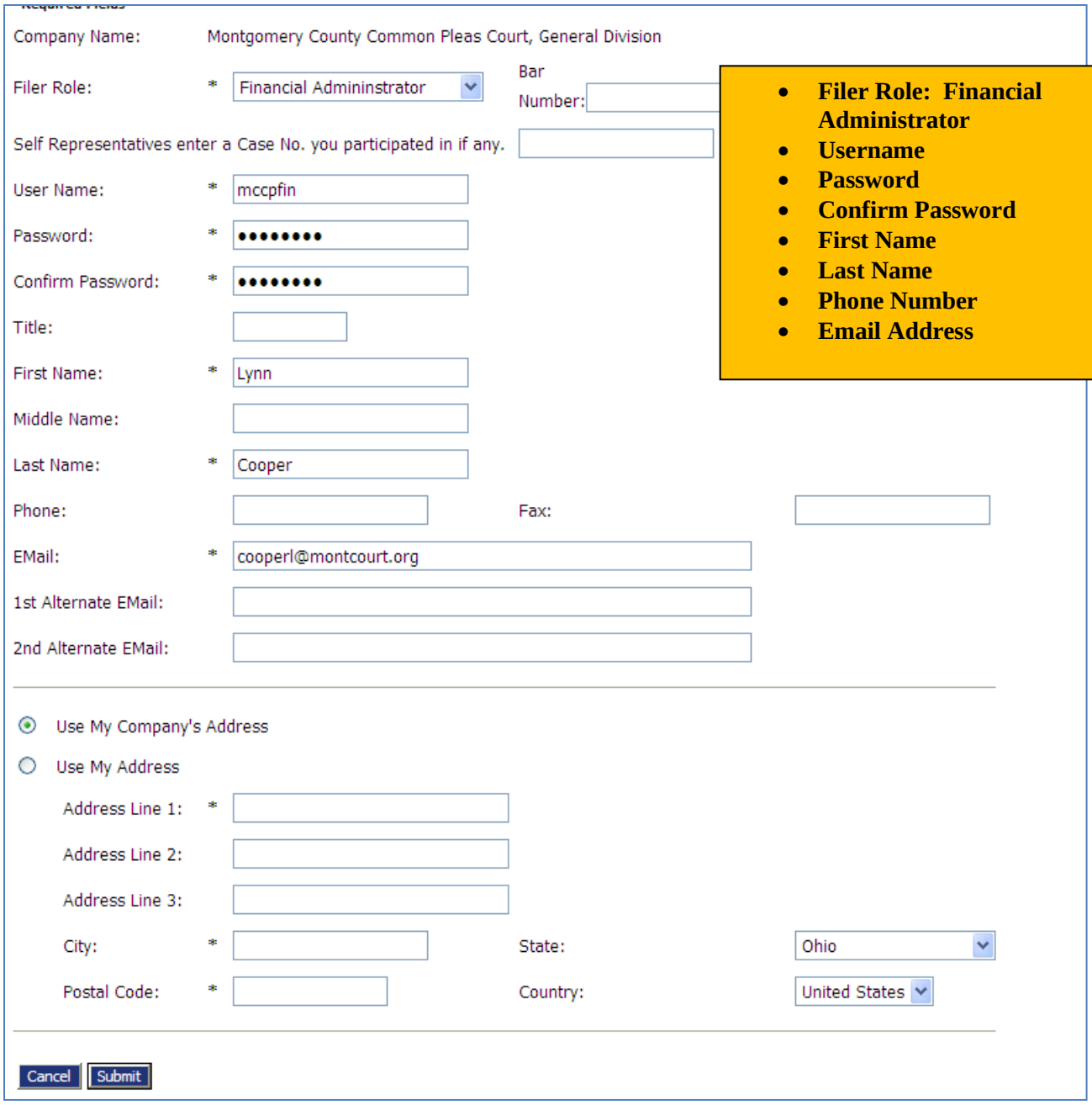
Setting up the Financial Administrator

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



- Complete the following fields:



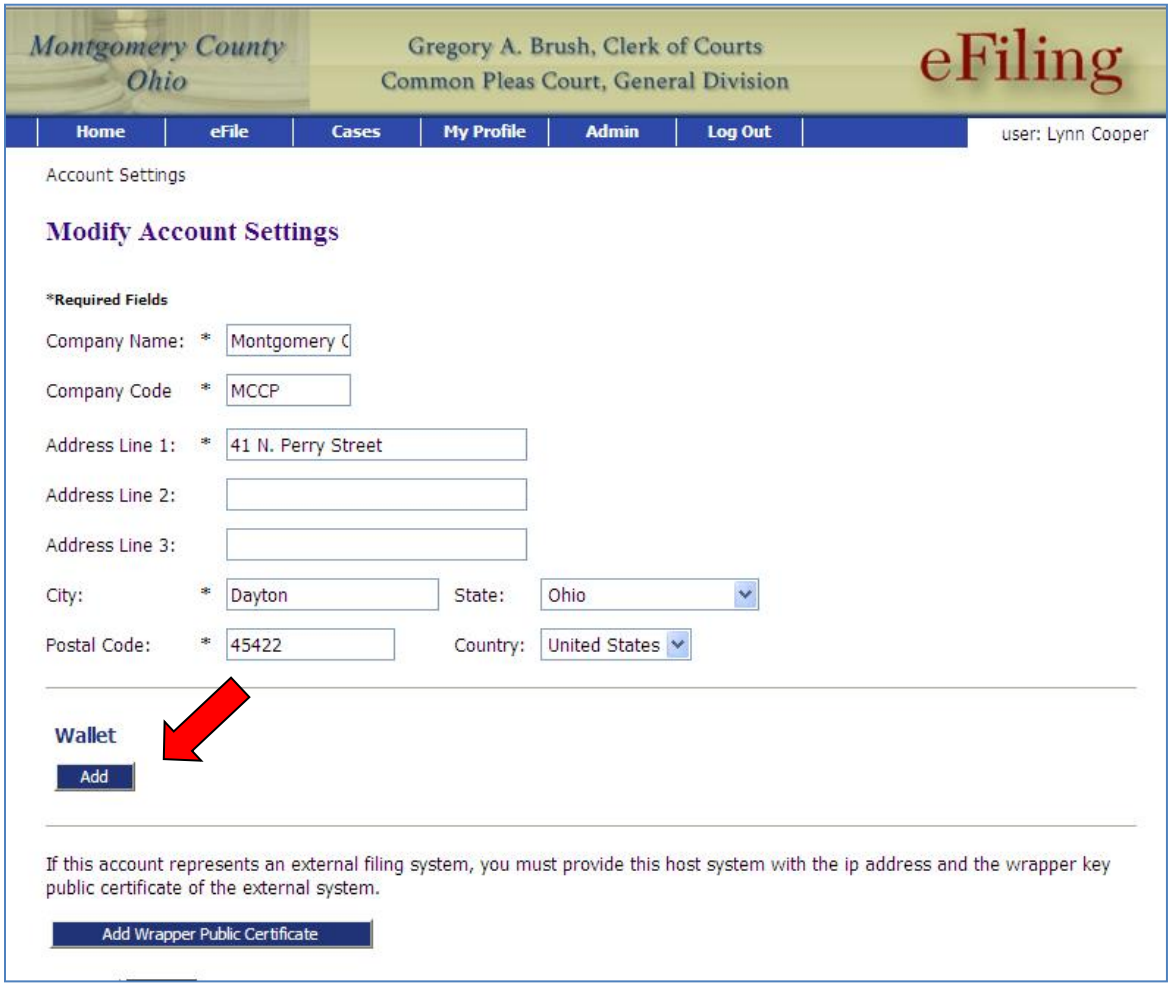
- **Filer Role: Financial Administrator**
- **Username**
- **Password**
- **Confirm Password**
- **First Name**
- **Last Name**
- **Phone Number**
- **Email Address**

- 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

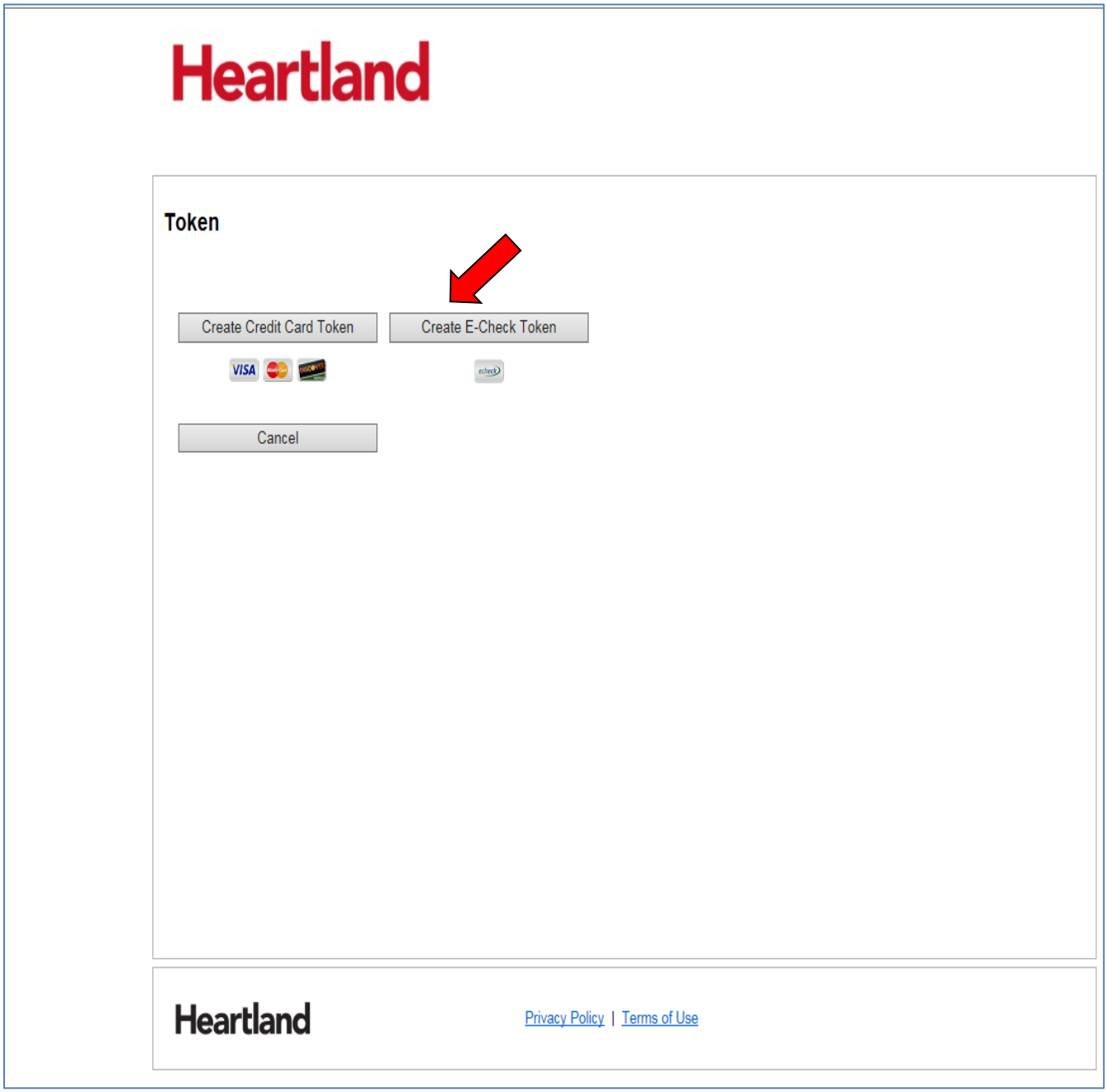
- Click Add in the Wallet section



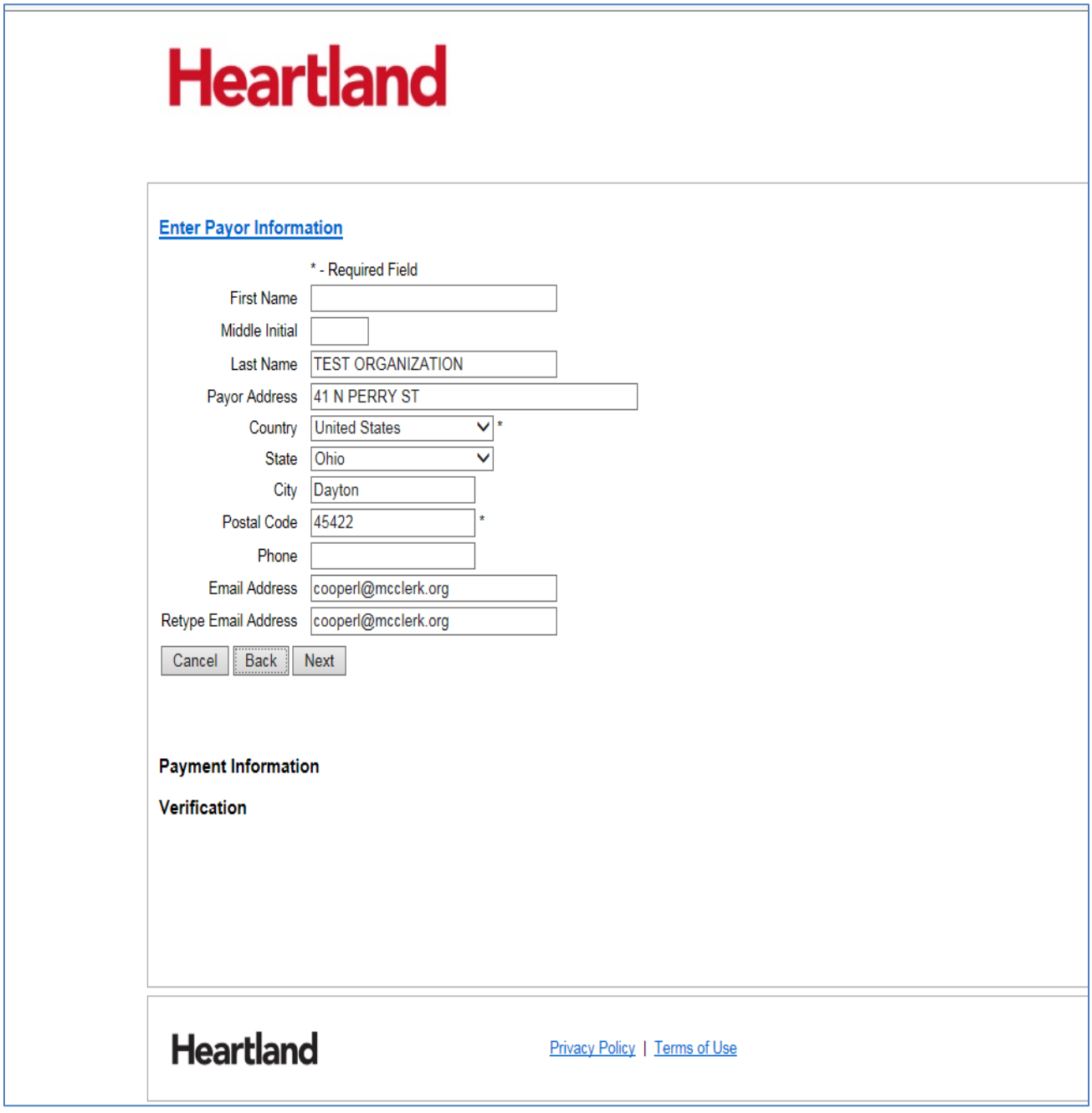
**** We recommend a separate wallet for each payment method**

Checking Accounts:

- Click Create E-Check Token

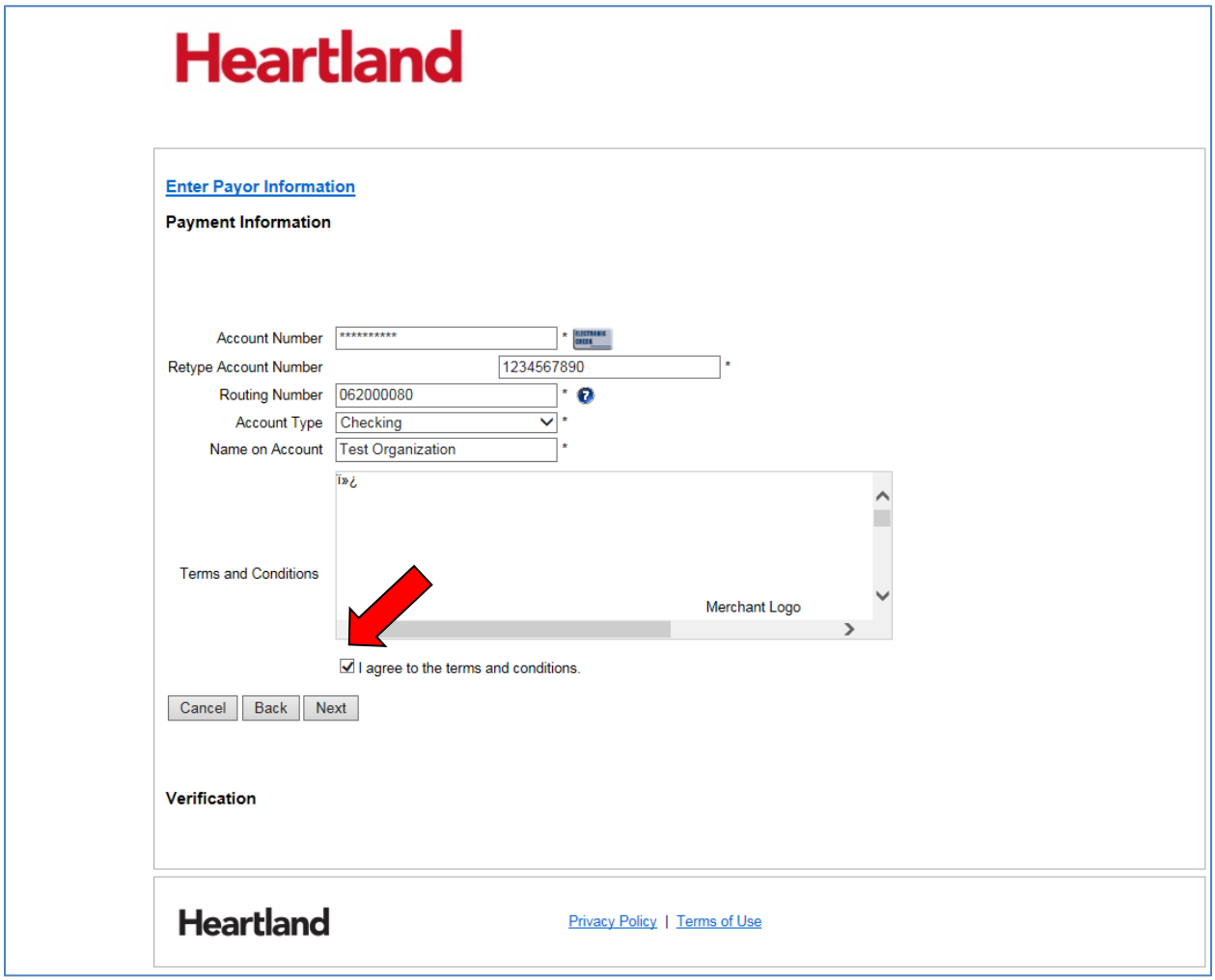


- Enter Payor Information



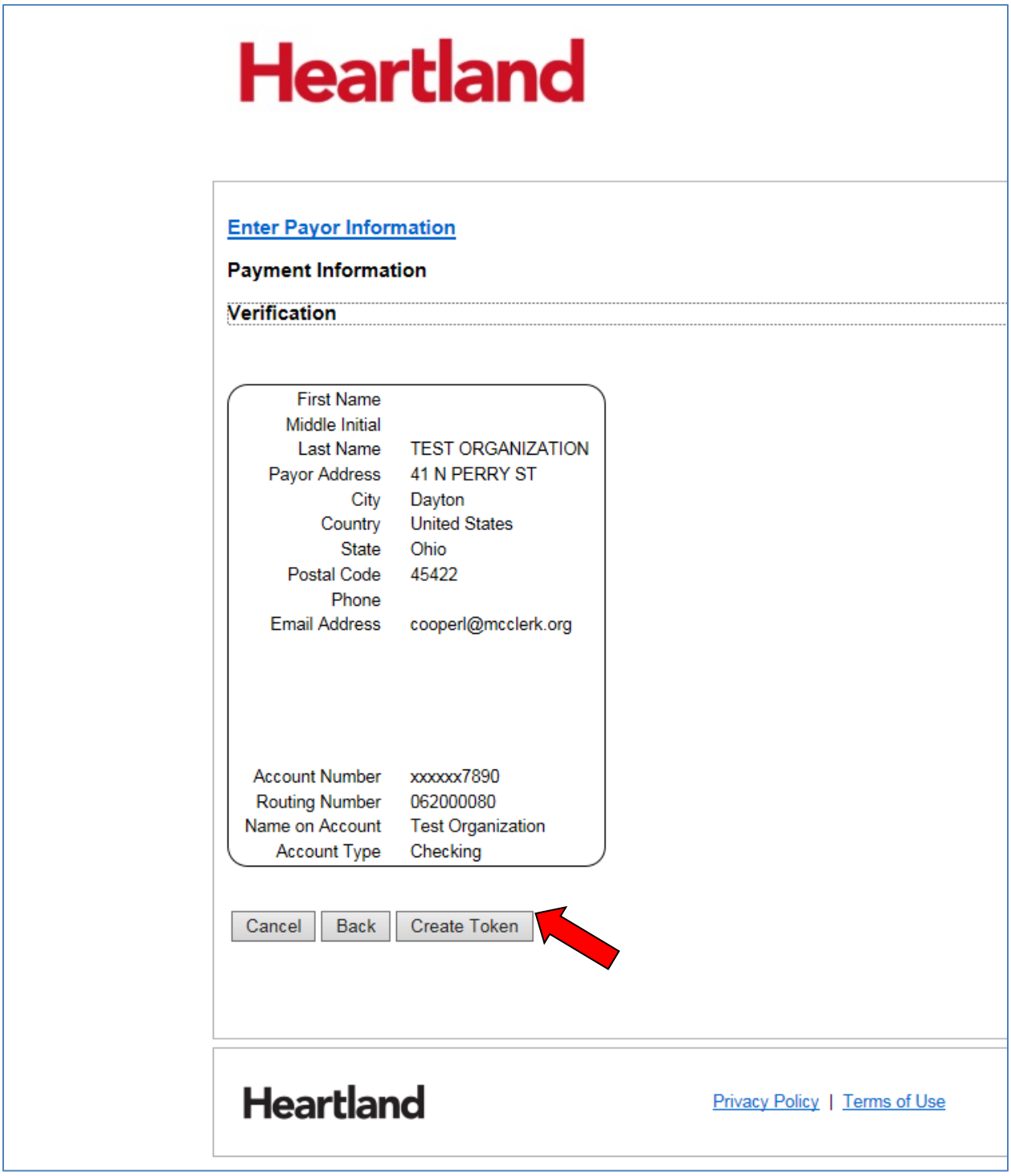
- Click Next

- Click “I agree to the terms and conditions”

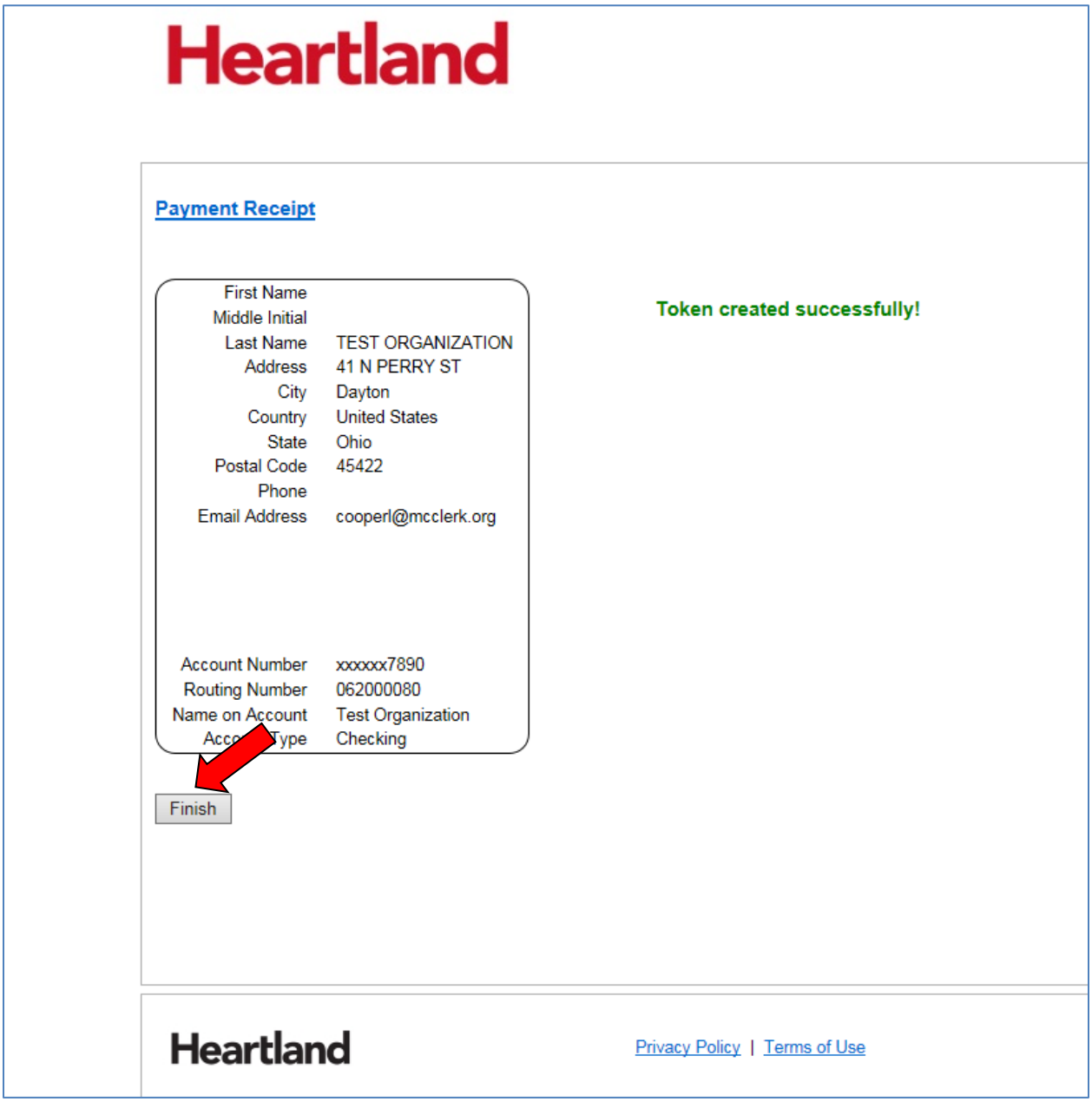


- Click Next

- Verify Information
- Click Create Token



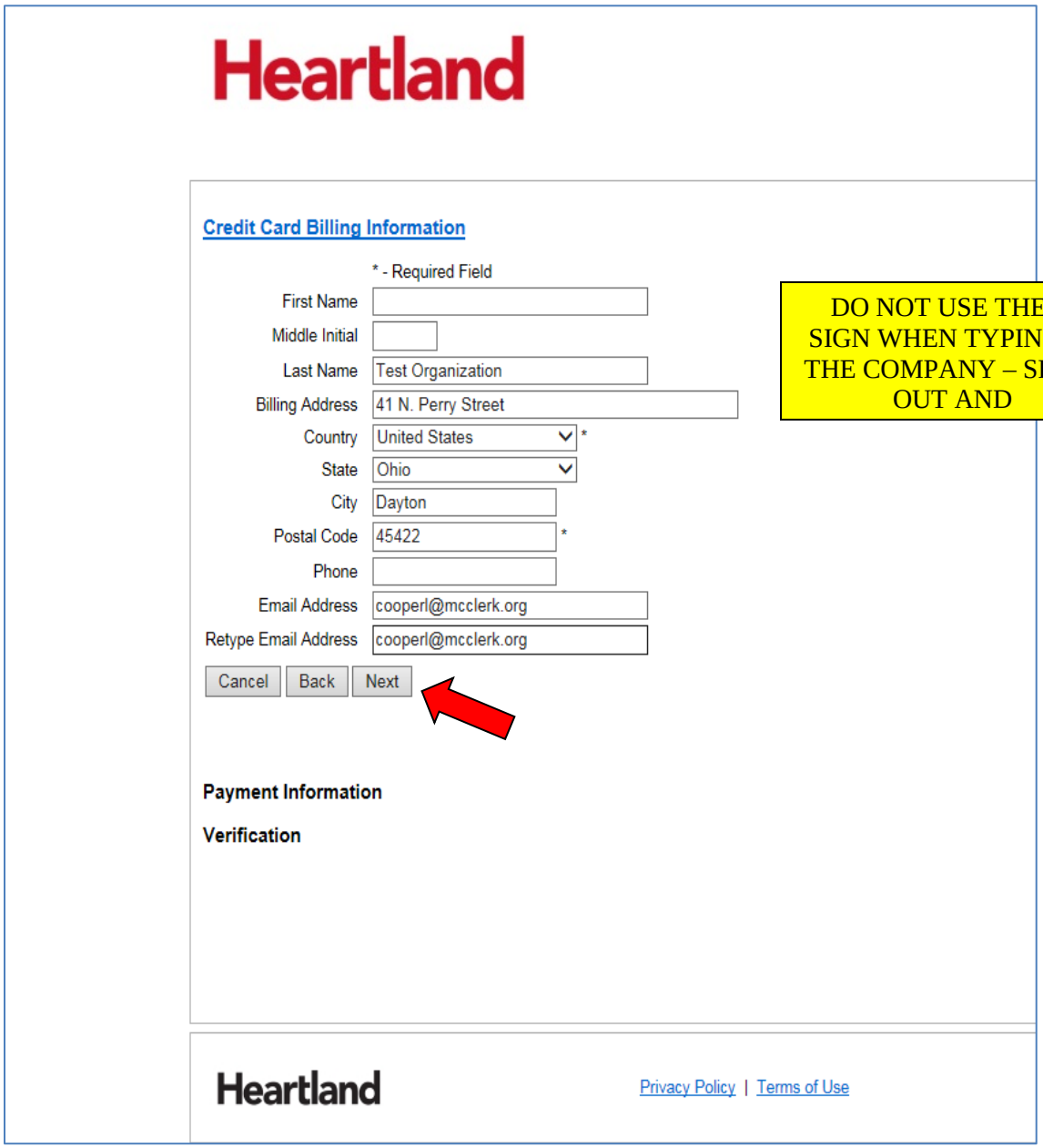
- Click Finish



Credit Cards (Visa, MasterCard, Discover and American Express)

- Click Create Credit Card Token

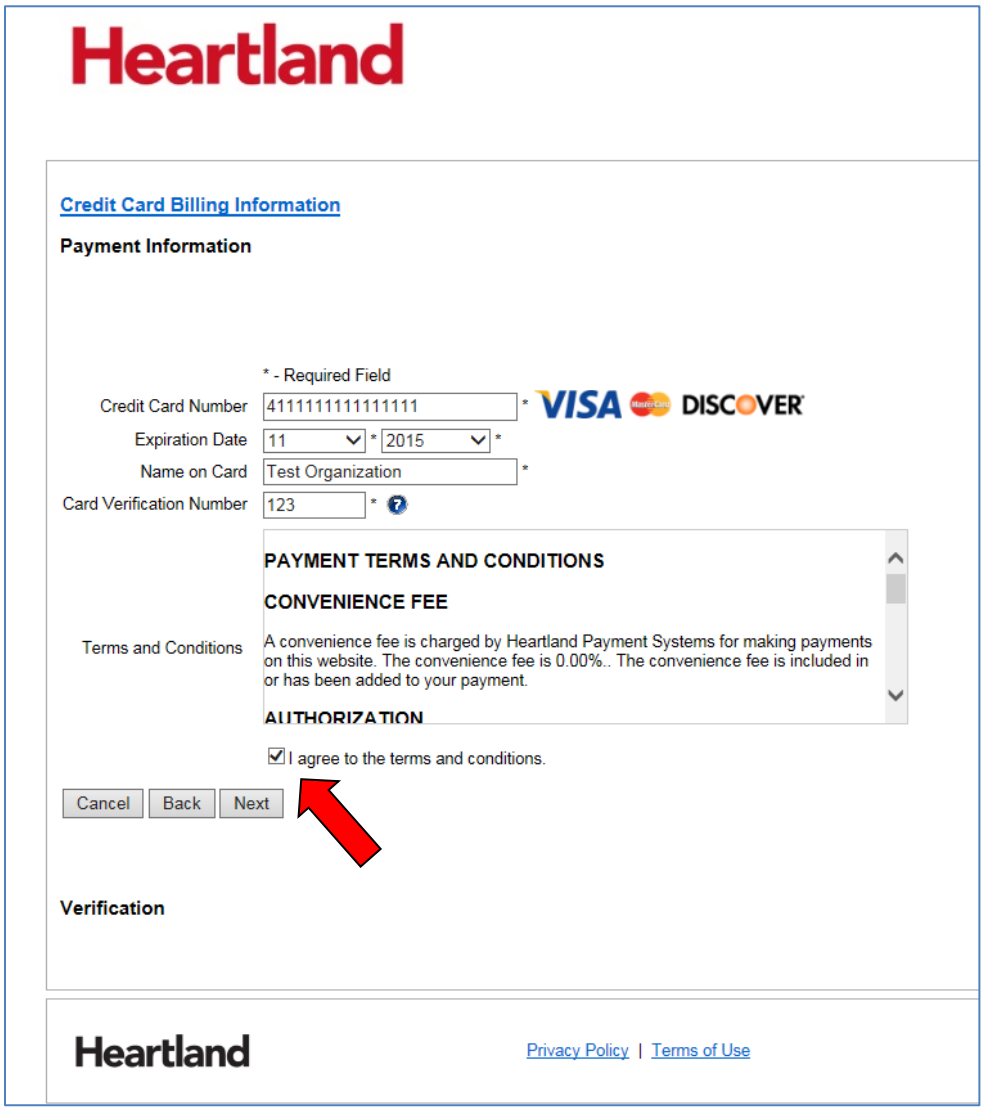
- Enter Credit Card Billing Information



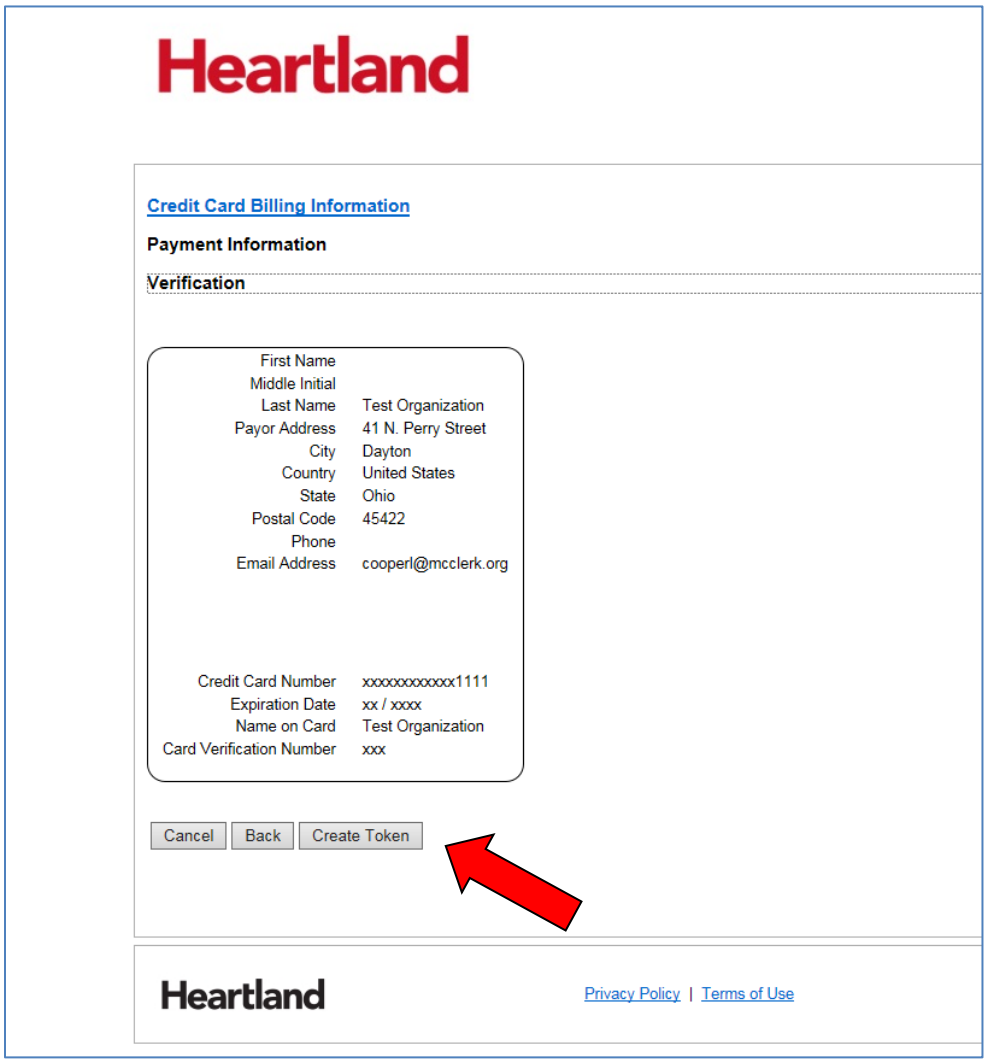
DO NOT USE THE & SIGN WHEN TYPING IN THE COMPANY – SPELL OUT AND

- Click Next

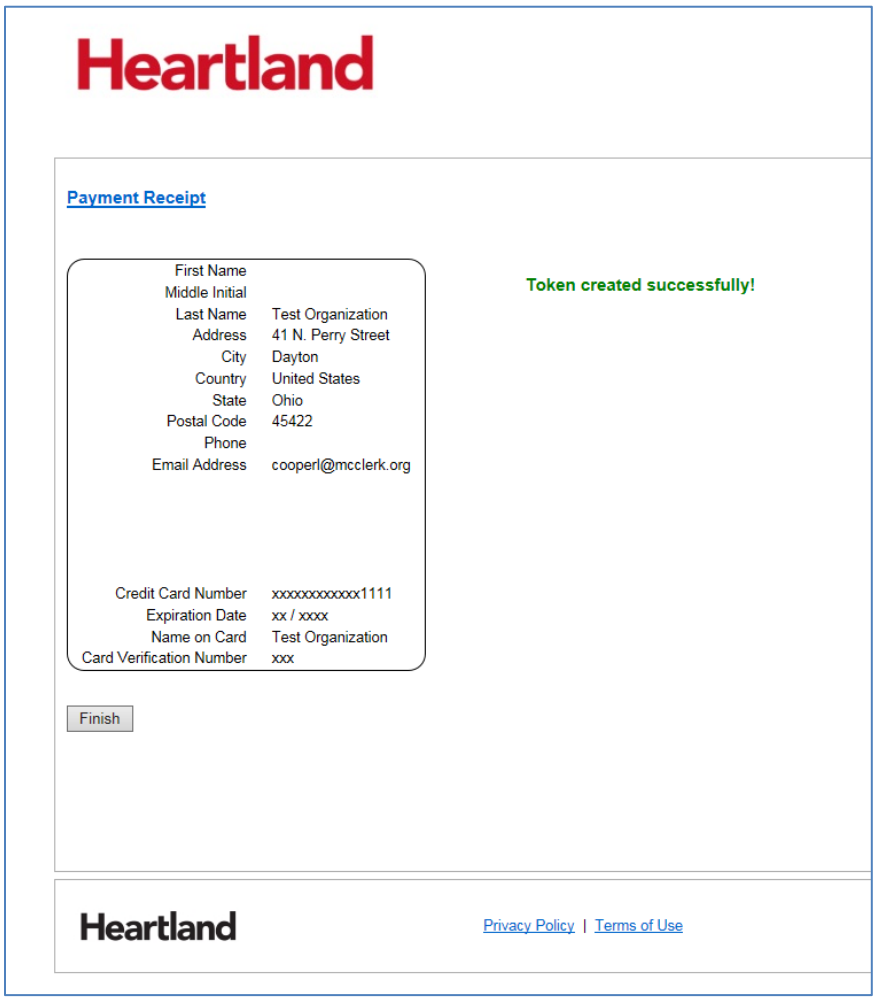
- Click “I agree to the terms and conditions”



- Click Next

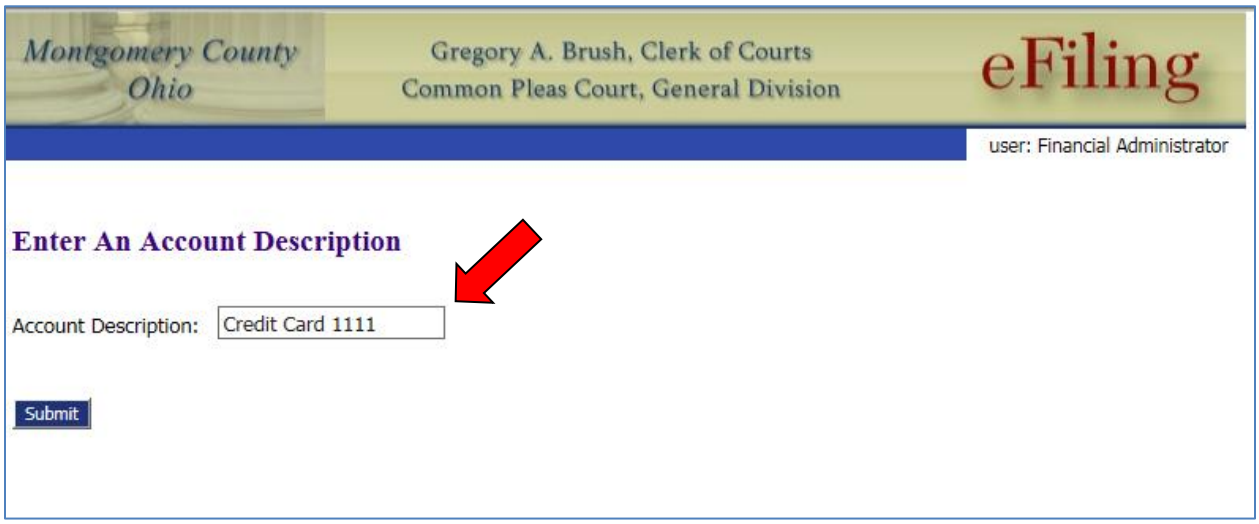


- Click Create Token



- Click Finish

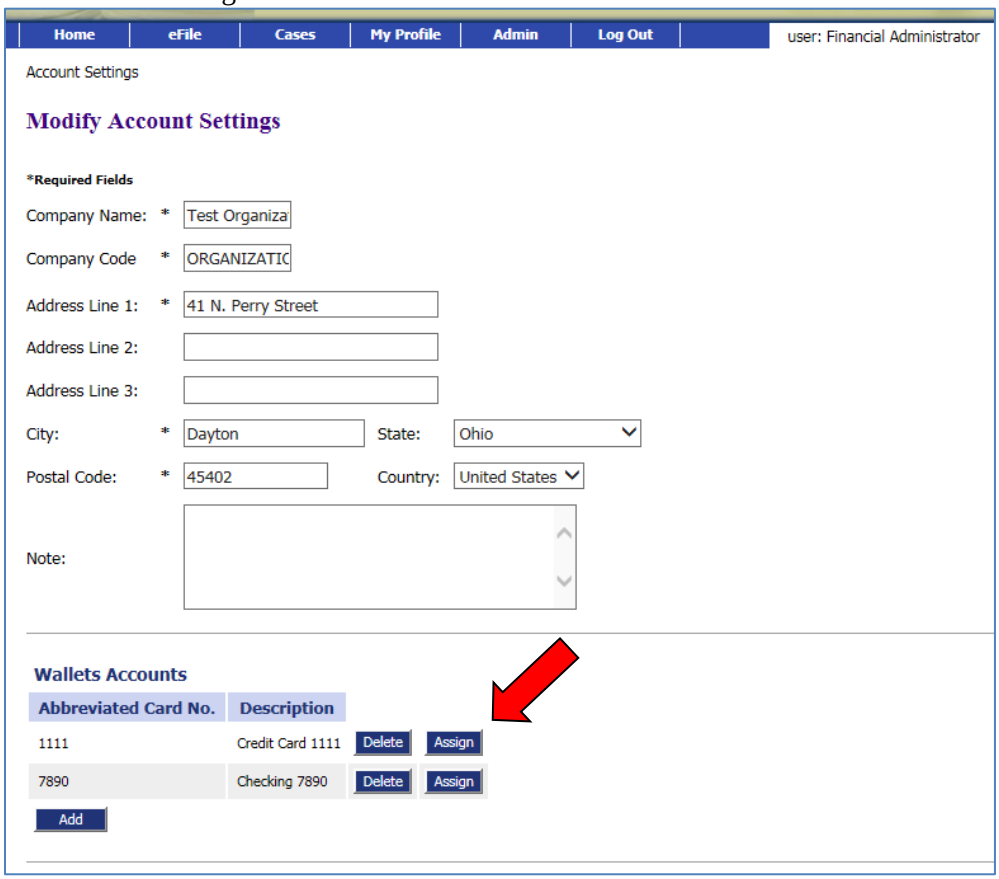
- Enter an Account Description



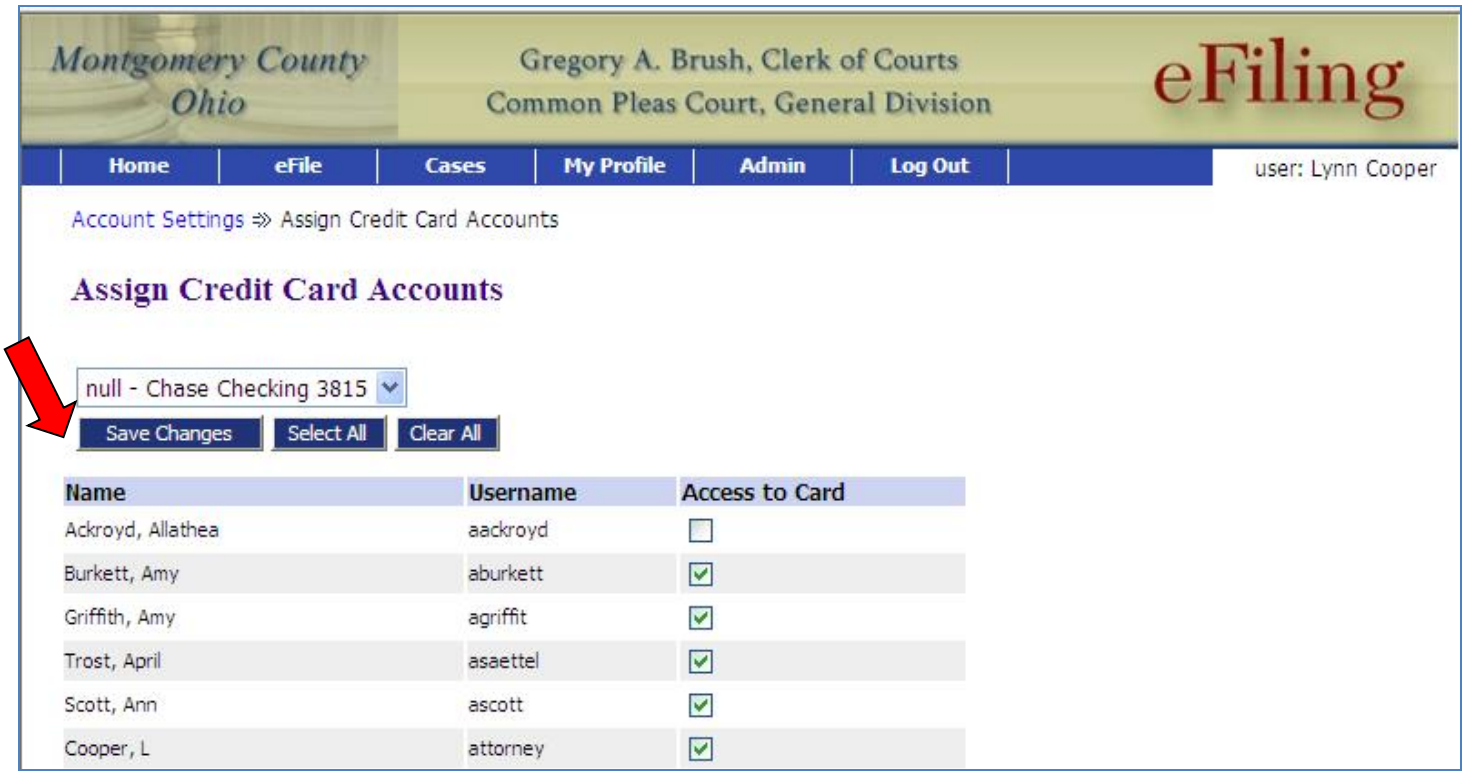
Assign Account Settings

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



- Click Save Changes
- Click Assign for the next method of payment

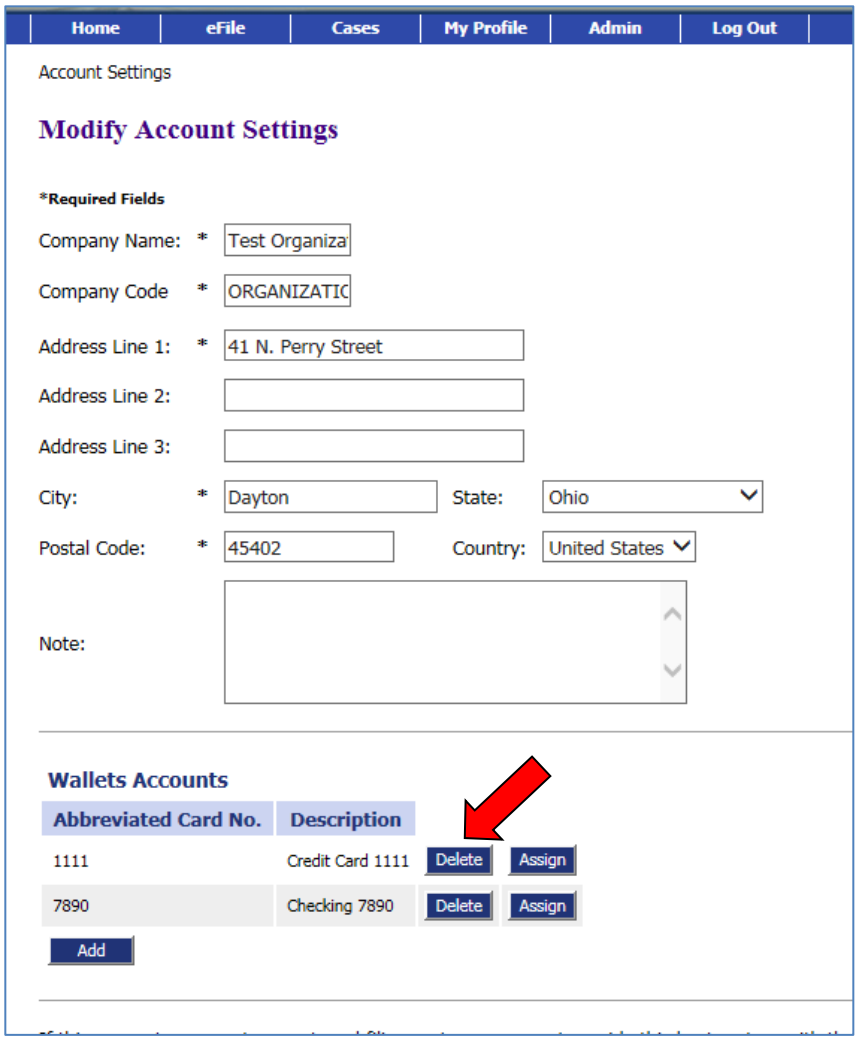
The username will now have the ability to use the accounts they have been given permissions to use. Each user will need to know the last four digits of the account in order submit a filing that requires money.

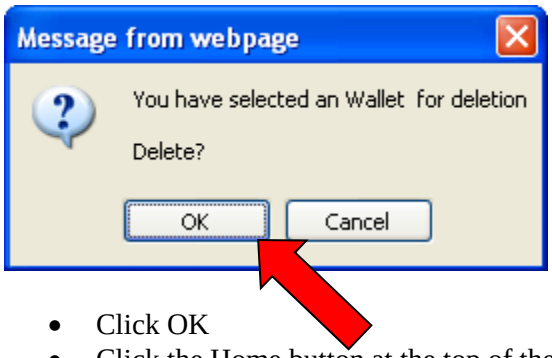
To remove permissions:

- 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



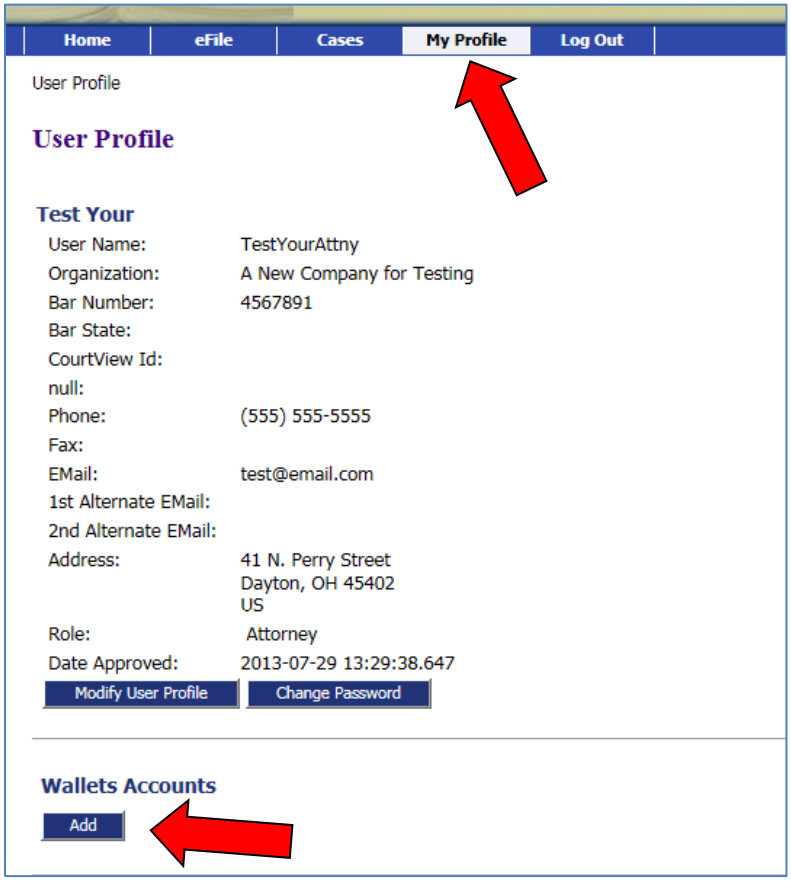


- Click OK
- Click the Home button at the top of the screen to return to the Home page

Establishing a Personal Wallet

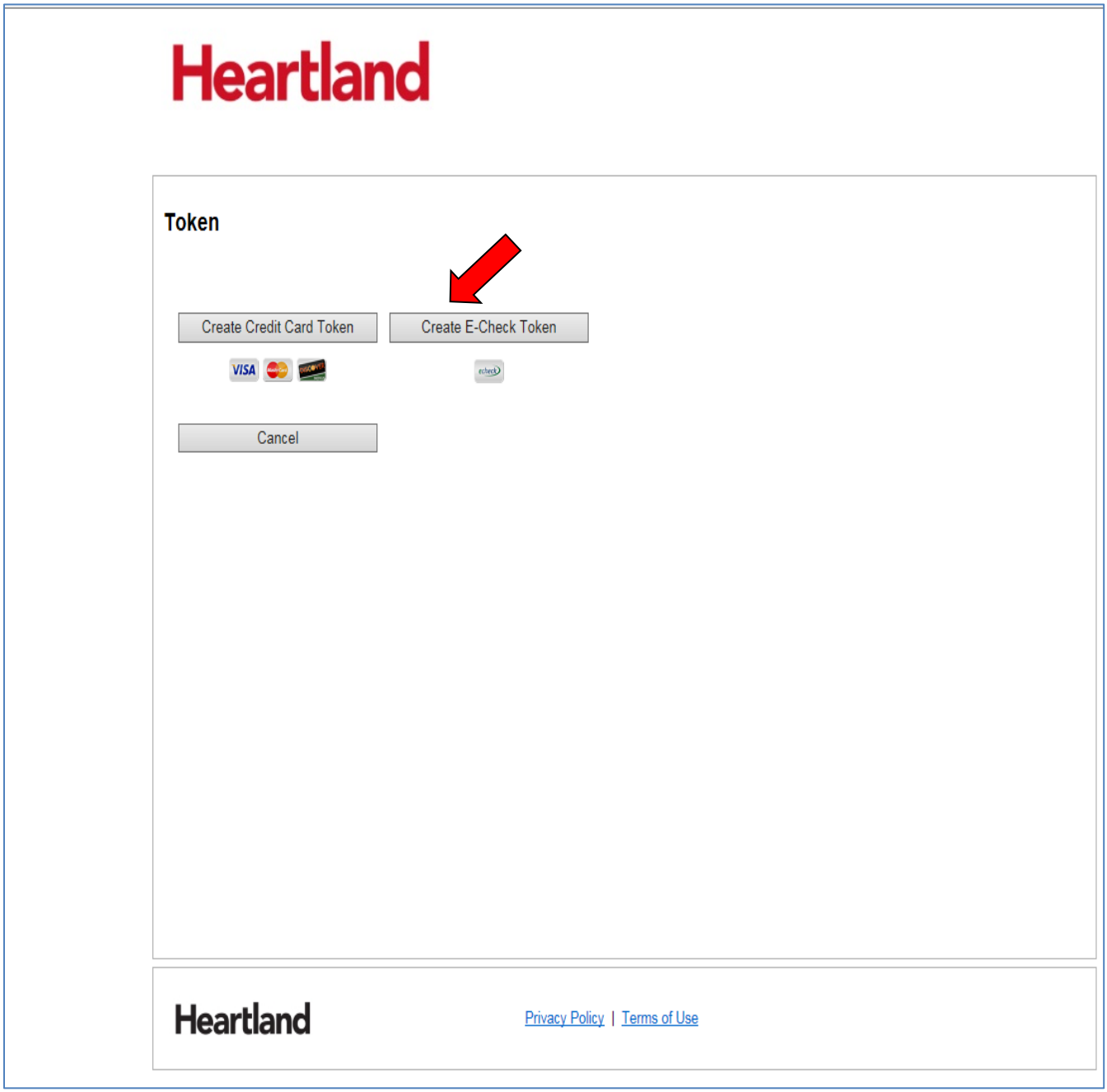
Personal Wallets are established under the profile settings of the individual user's account.

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

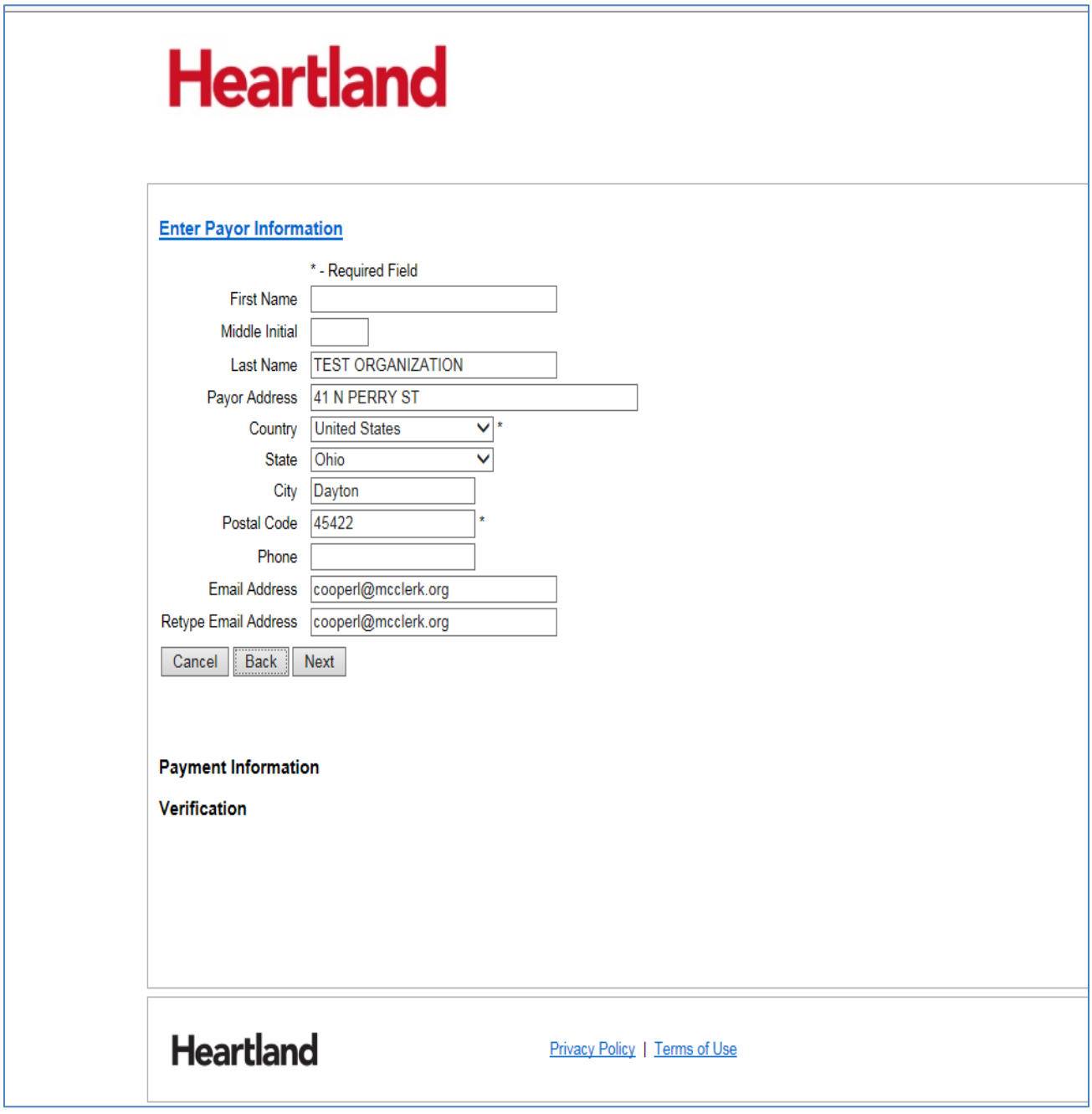


Checking Accounts:

- Click Create E-Check Token

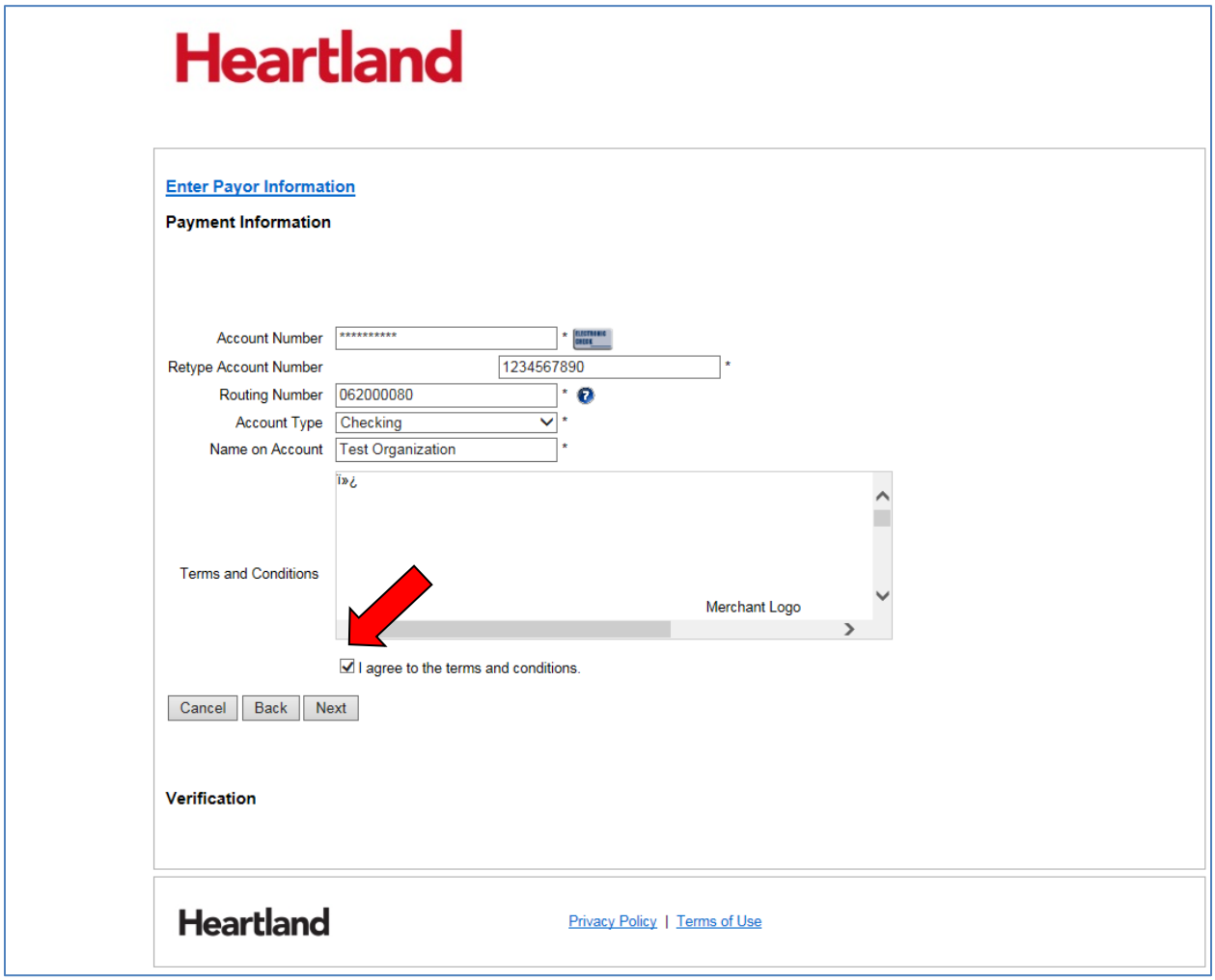


- Enter Payor Information



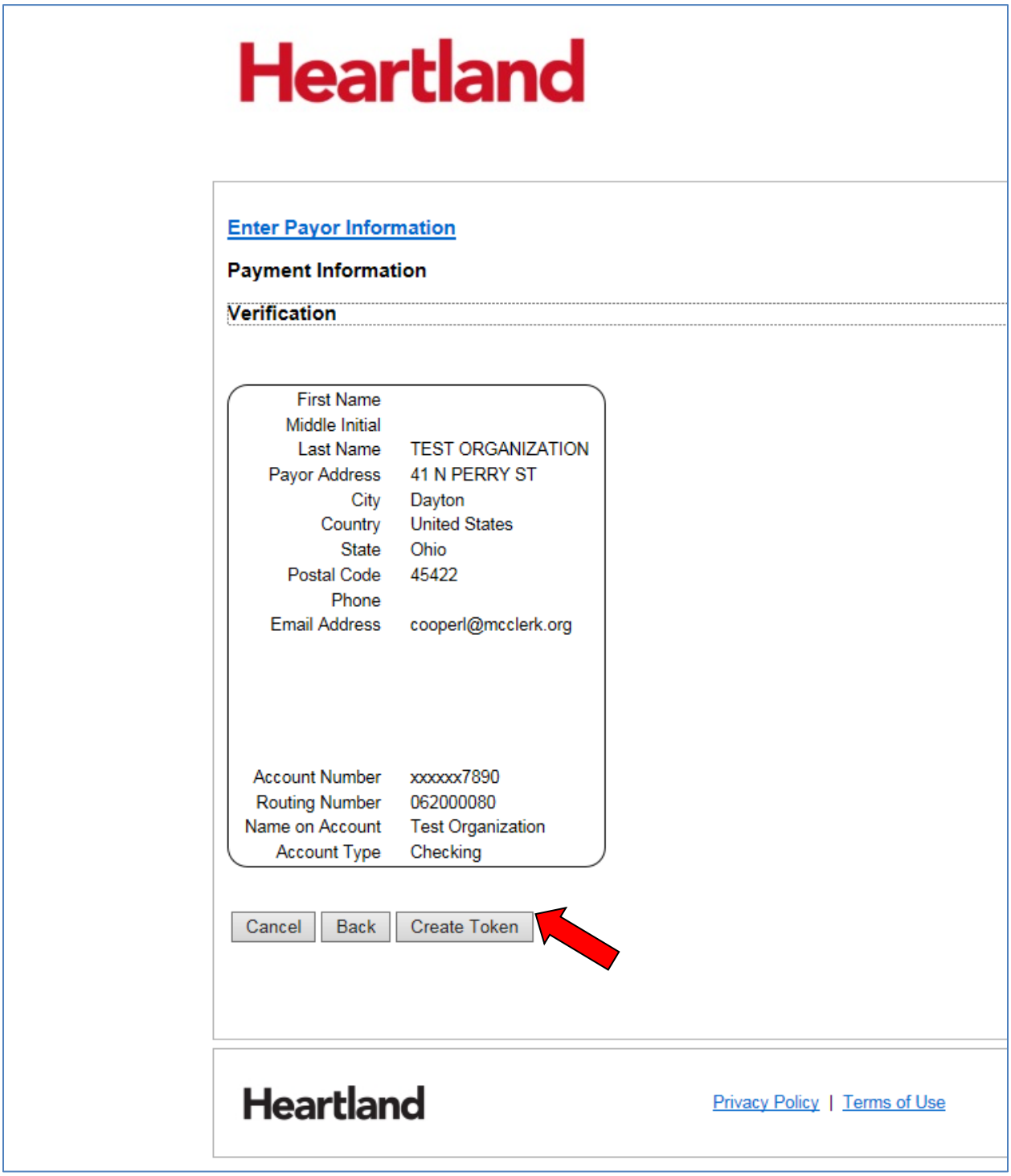
- Click Next

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

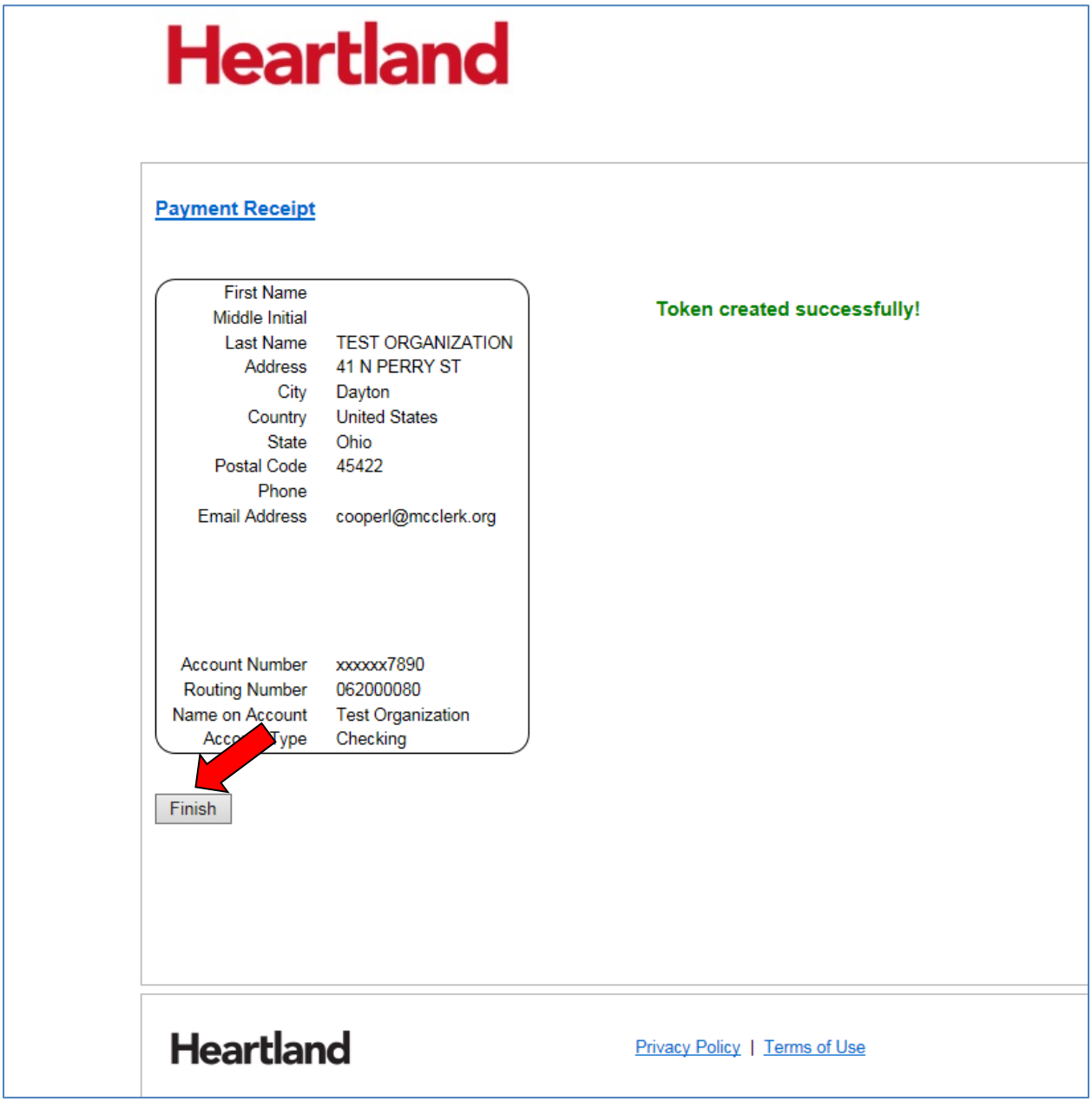


- Click Next

- Verify Information
- Click Create Token



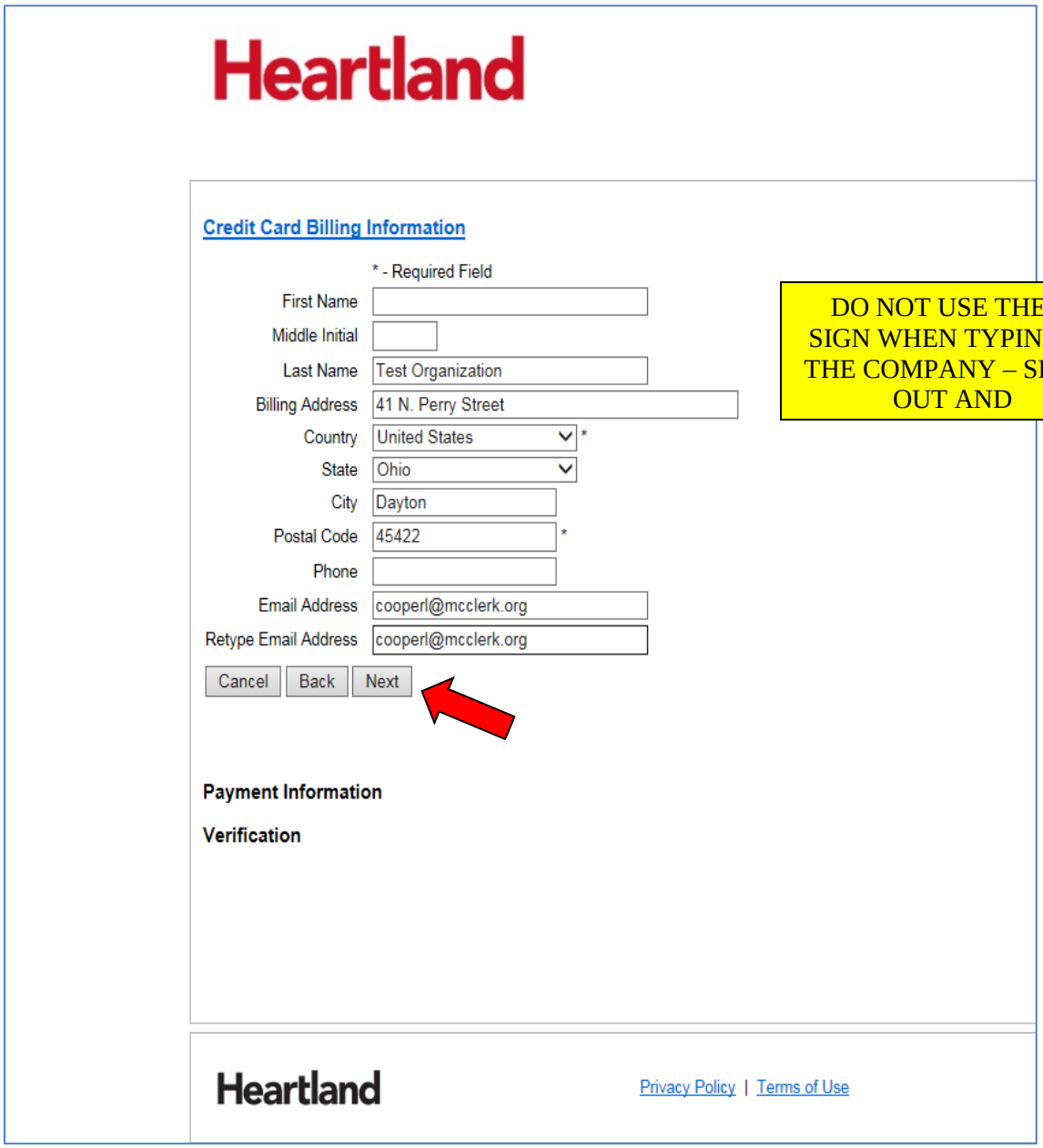
- Click Finish



Credit Cards (Visa, MasterCard, Discover and American Express)

- Click Create Credit Card Token

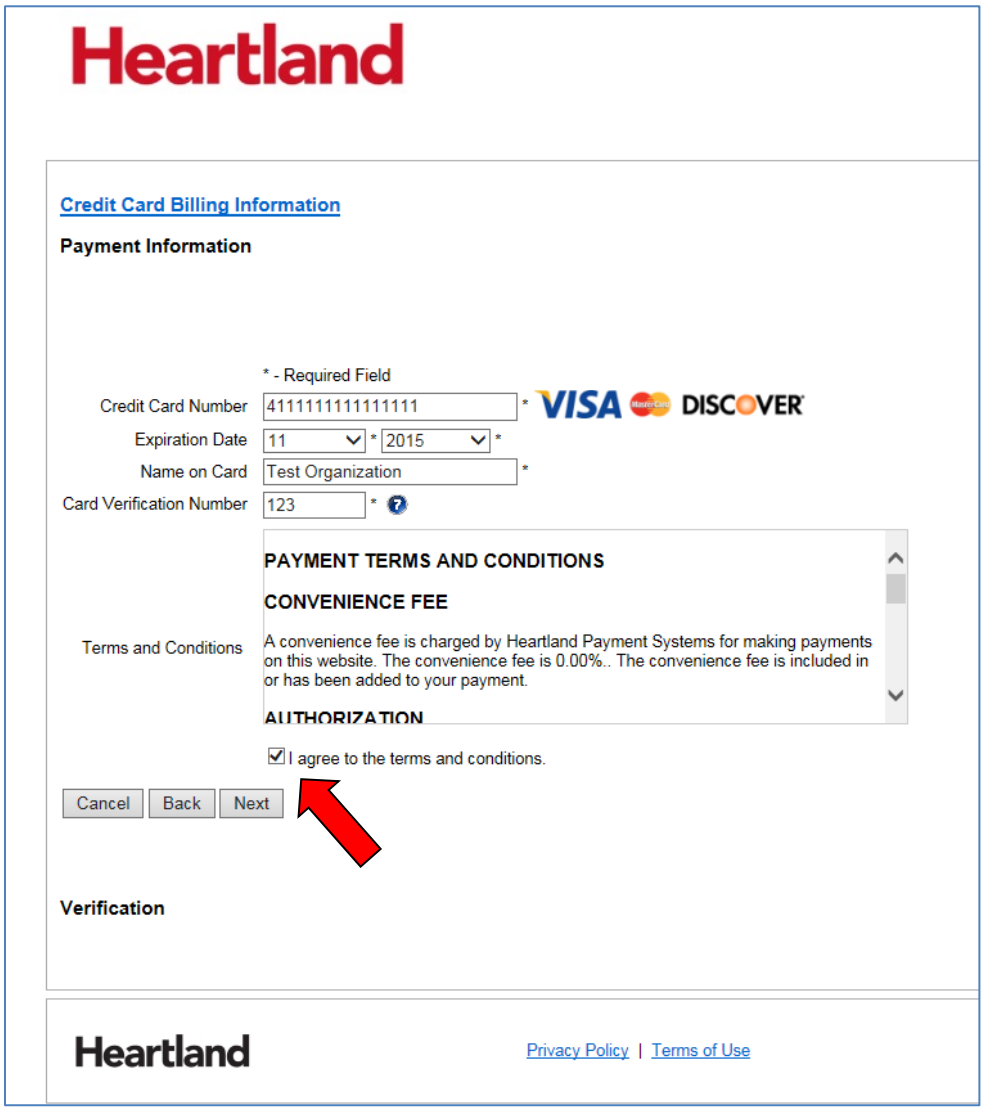
- Enter Credit Card Billing Information



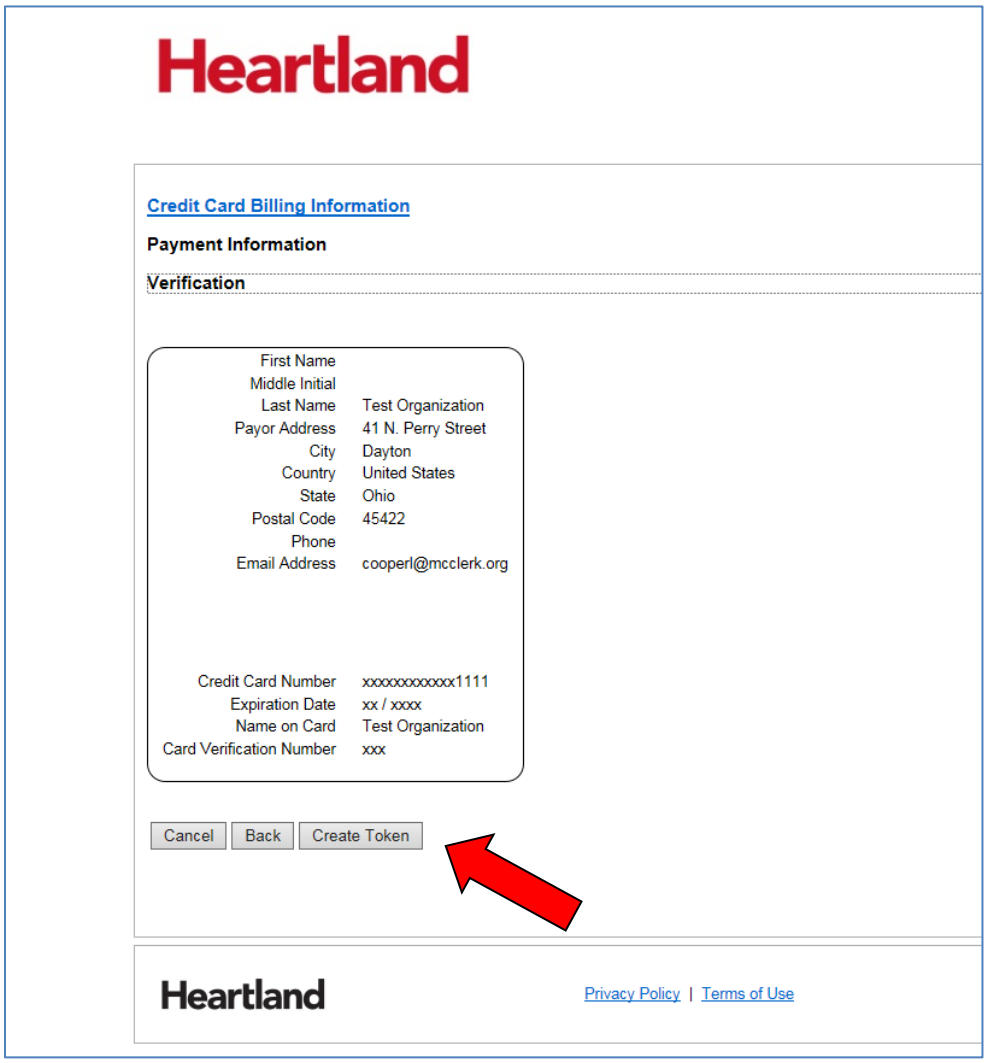
DO NOT USE THE & SIGN WHEN TYPING IN THE COMPANY – SPELL OUT AND

- Click Next

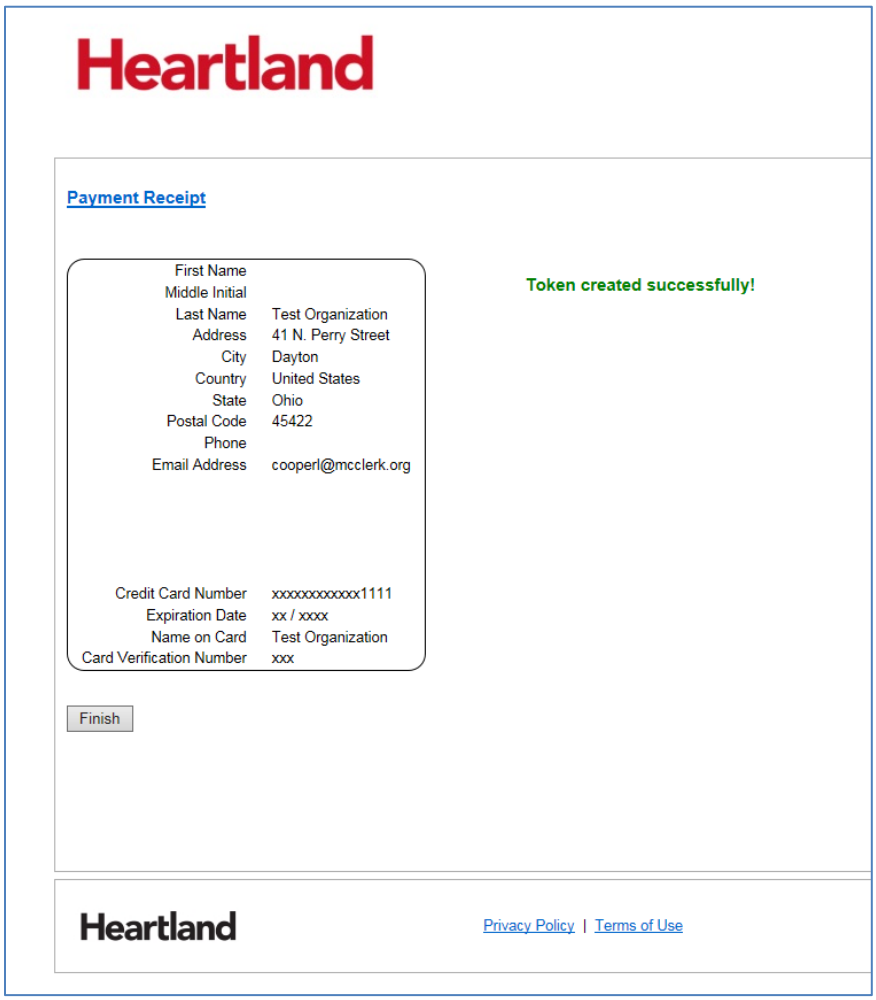
- Click on Accept Terms



- Click Next



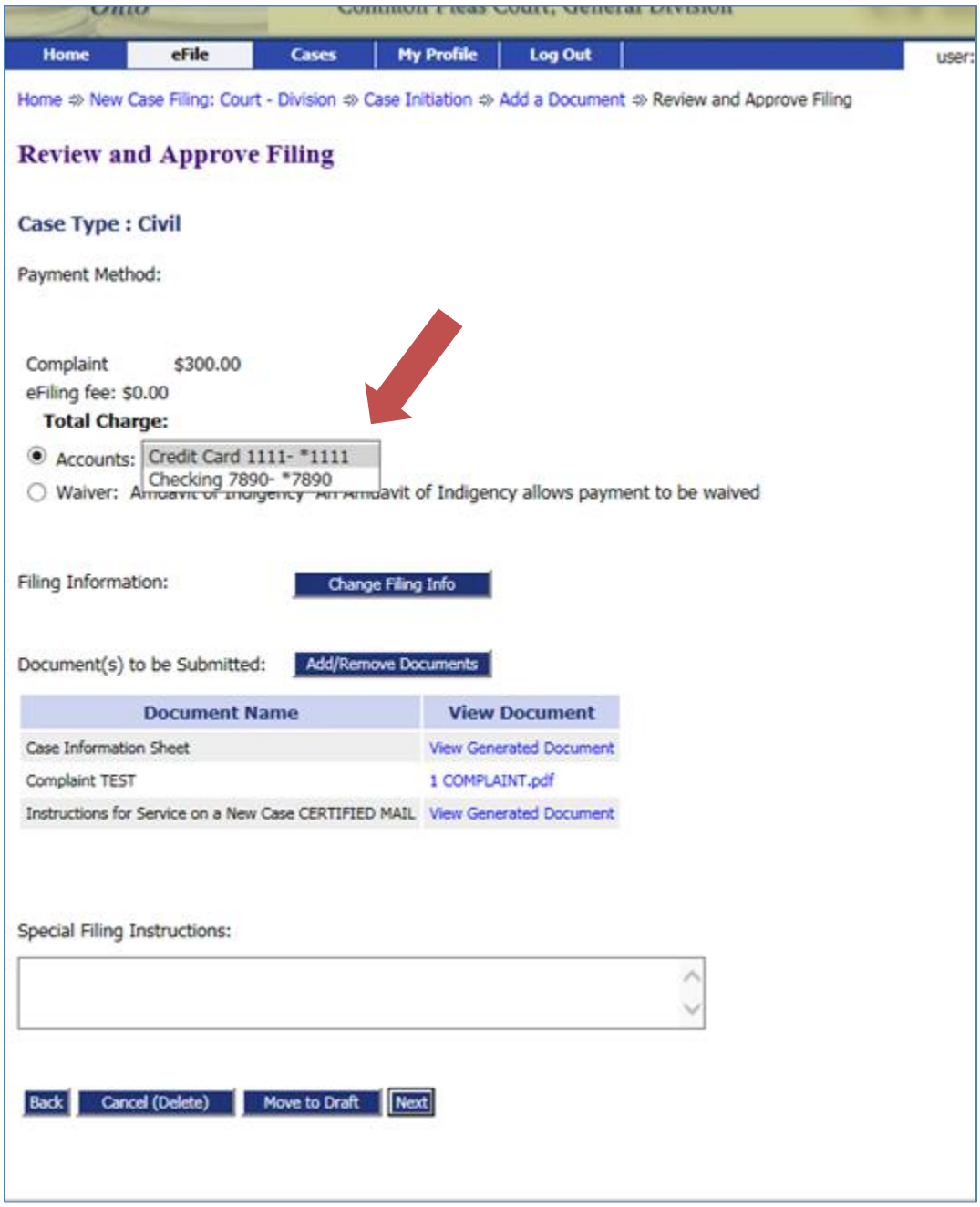
- Click Create Token



- Click Finish

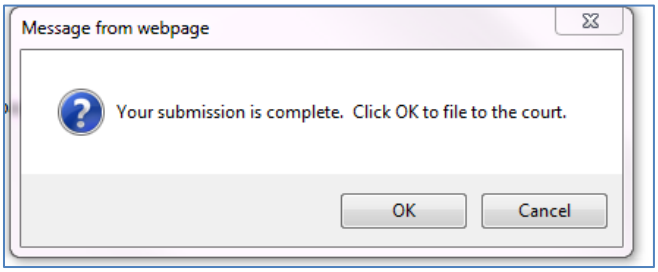
Using an Established Wallet

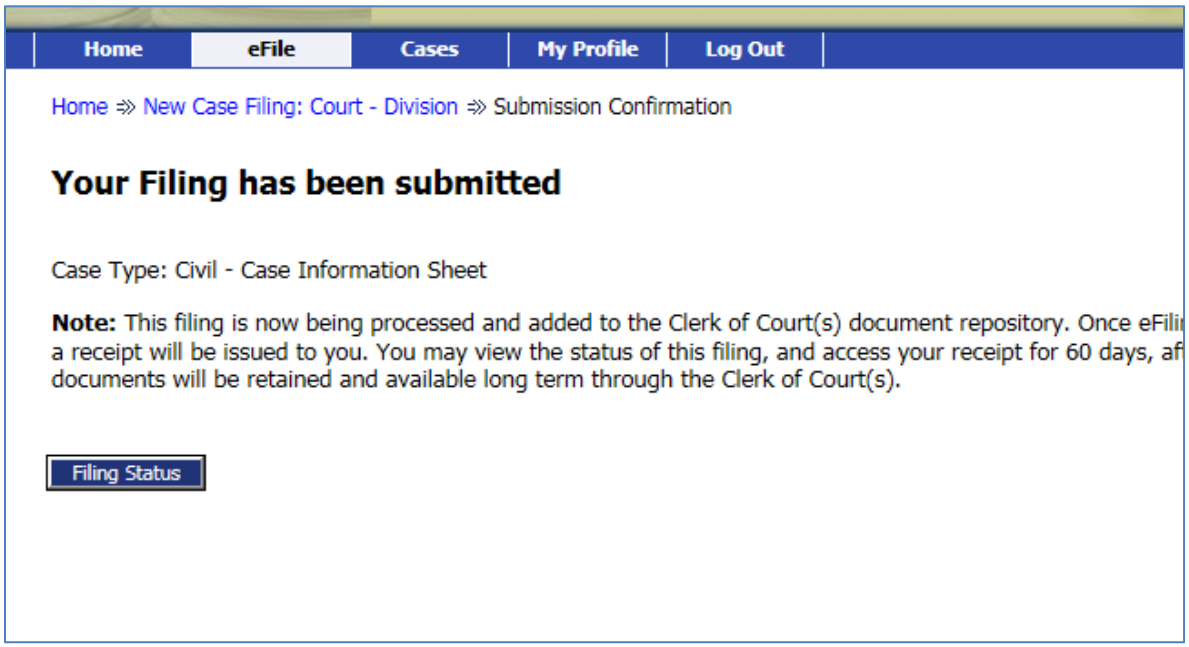
- Select the account to use
- Click Next



- Click Next

- Click Ok





- Click on Filing Status

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

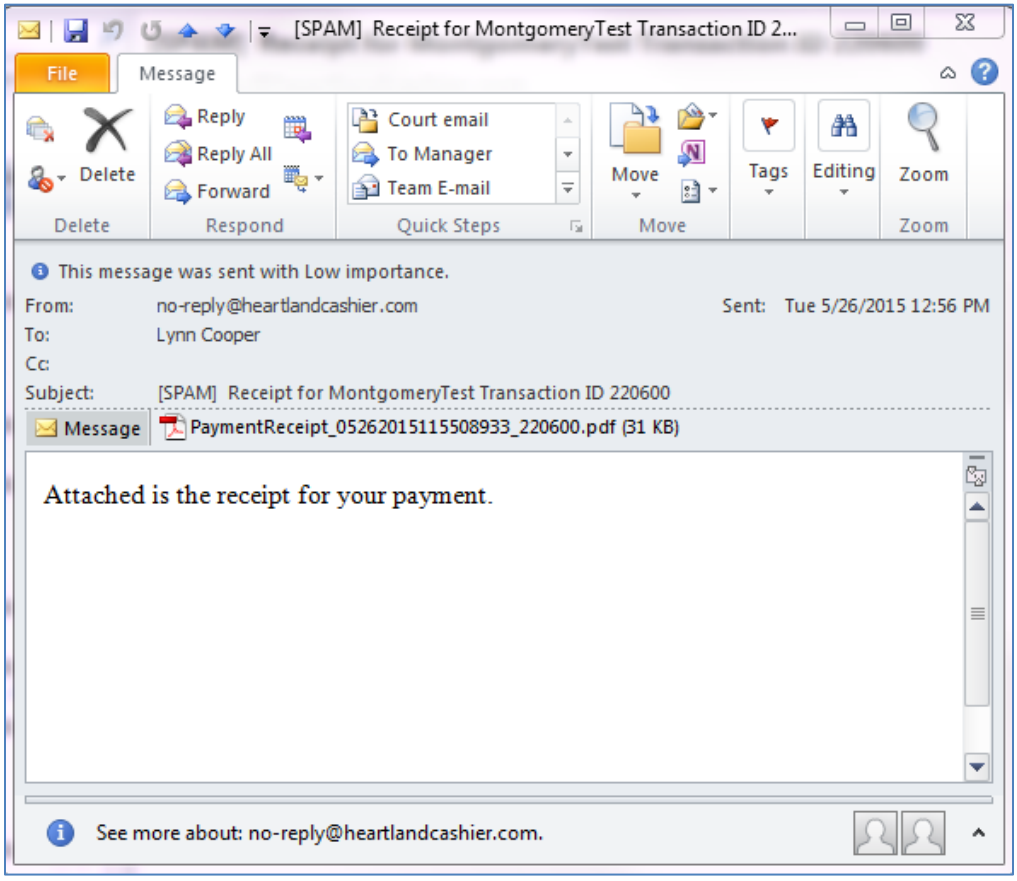
Package Pending → Packaged → Received → Awaiting Approval → Filed

* 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

Date / Time 5/26/2015 12:55:08 PM Cashier MtgApi

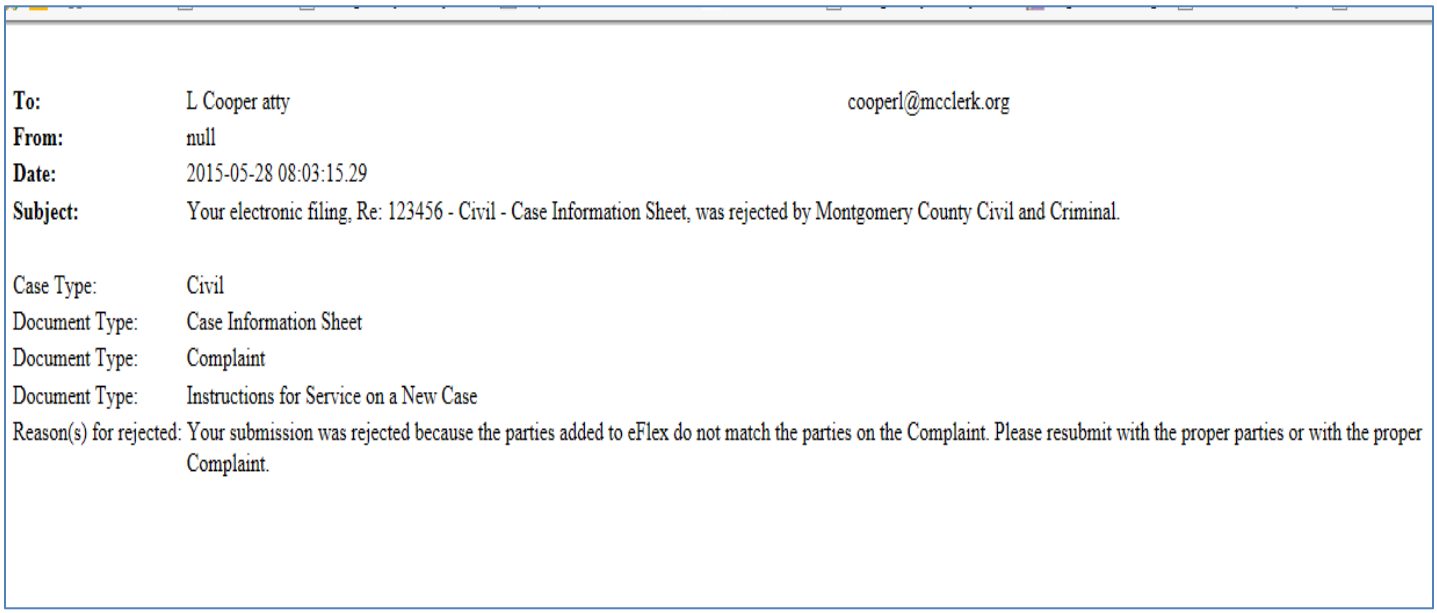
Transaction ID 220600 $300.00 Amount

Account Number CourtFilingFee

Payment Summary : Visa payment for $300.00.
Payment Acct Last4 : ********1111
Billing Name : TEST ORGANIZATION
Billing Address : 41 N PERRY STREET
DAYTON, OH 45422
Phone Number :
Email Address : cooperl@mcclerk.org

Rejected Submission

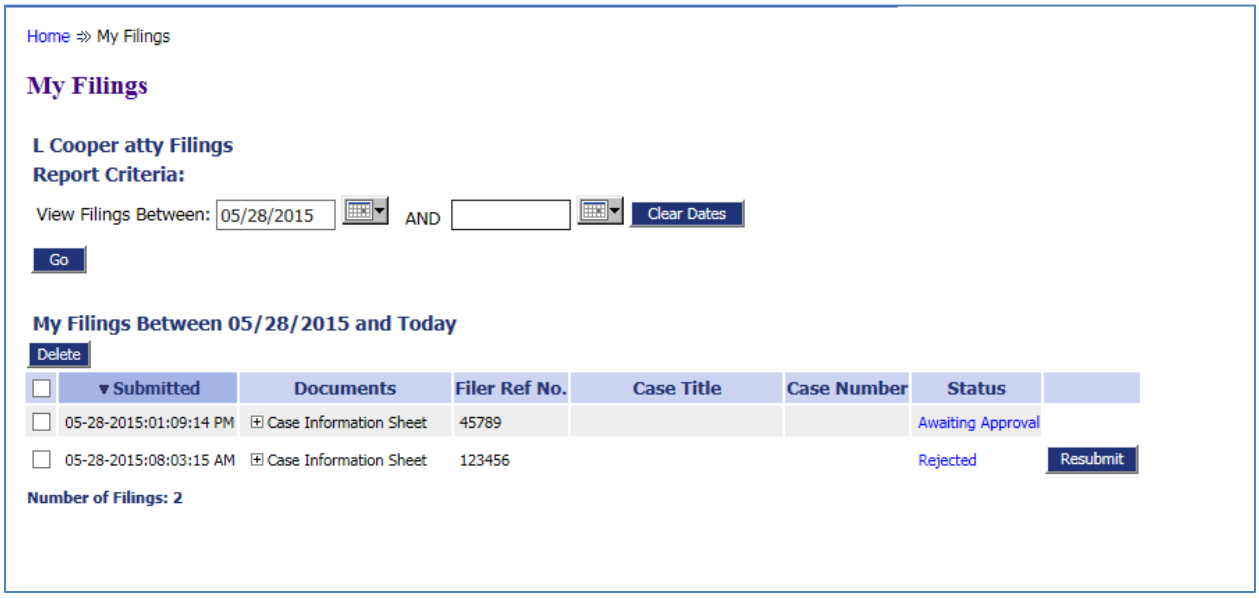
- Email sent from montefiling@mcclerk.org with the reason for the rejection



To: L Cooper atty cooperl@mcclerk.org
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:



Home ⇒ My Filings

My Filings

L Cooper atty Filings
Report Criteria:

View Filings Between: 05/28/2015 AND Clear Dates

Go

My Filings Between 05/28/2015 and Today

Delete

Submitted	Documents	Filer Ref No.	Case Title	Case Number	Status	
05-28-2015:01:09:14 PM	Case Information Sheet	45789			Awaiting Approval	
05-28-2015:08:03:15 AM	Case Information Sheet	123456			Rejected	Resubmit

Number of Filings: 2

- 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**