

ELECTRONIC
FILING -
PAYMENT
PROCESS

05/26/2015

Contents

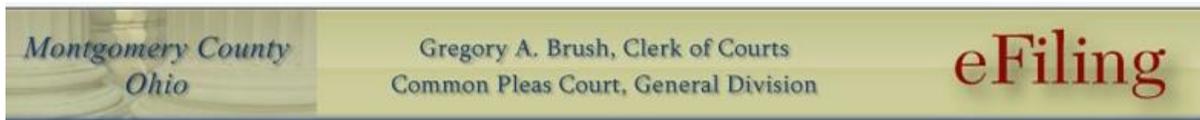
Establishing Wallets.....	1
Setting up the Financial Administrator	1
Request an Eflex Account.....	1
Financial Administrator – Adding the Wallet(s).....	3
Checking Accounts:	5
Credit Cards (Visa, MasterCard, Discover and American Express)	10
Assign Account Settings	15
Delete a Wallet.....	17
Establishing a Personal Wallet.....	18
Checking Accounts:	19
Credit Cards (Visa, MasterCard, Discover and American Express)	24
Using an Established Wallet	29
Receipt for Payments - Successful Submission	31
Rejected Submission.....	31

Establishing Wallets

Setting up the Financial Administrator

Request an Eflex Account

- Go to <https://efiling.mcoho.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 User Company

Select a company

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

Existing Company Name:

New Company Name:

- Complete the following fields:

Required Fields

Company Name: Montgomery County Common Pleas Court, General Division

Filer Role: * Financial Administrator Bar Number:

Self Representatives enter a Case No. you participated in if any.

User Name: * mccpfin

Password: *

Confirm Password: *

Title:

First Name: * Lynn

Middle Name:

Last Name: * Cooper

Phone: Fax:

Email: * cooperl@montcourt.org

1st Alternate EMail:

2nd Alternate EMail:

Use My Company's Address

Use My Address

Address Line 1: *

Address Line 2:

Address Line 3:

City: * State:

Postal Code: * Country:

- 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



The screenshot displays the eFiling system interface. At the top, the header includes the Montgomery County Ohio logo, the name Gregory A. Brush, Clerk of Courts, Common Pleas Court, General Division, and the eFiling logo. Below the header is a navigation bar with tabs for Home, eFile, Cases, My Profile, Admin, and Log Out. The Admin tab is selected, and a red arrow points to it. A dropdown menu is open under the Admin tab, showing the option Account Settings. The user's name, Lynn Cooper, is displayed in the top right corner. Below the navigation bar, the Home page is visible, featuring several buttons and their corresponding actions:

Button	Action
New Case	File new case
File To Existing Case	File subsequent document to existing case
Filing Status	Check the status of my filings
My Recent Cases	List of my ECF cases
Notifications	Review your Notifications
Case Search	

- Click Add in the Wallet section

Account Settings

Modify Account Settings

***Required Fields**

Company Name: *

Company Code: *

Address Line 1: *

Address Line 2:

Address Line 3:

City: * State:

Postal Code: * Country:

Wallet



If this account represents an external filing system, you must provide this host system with the ip address and the wrapper key public certificate of the external system.

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

Checking Accounts:

- Click Create E-Check Token

Heartland

Token

Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Enter Payor Information

Heartland

[Enter Payor Information](#)

* - Required Field

First Name

Middle Initial

Last Name

Payor Address

Country *

State *

City

Postal Code *

Phone

Email Address

Retype Email Address

Payment Information

Verification

Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Click Next

- Click “I agree to the terms and conditions”

Heartland

[Enter Payor Information](#)

Payment Information

Account Number * REQUIREMENTS

Retype Account Number *

Routing Number * ?

Account Type *

Name on Account *

Terms and Conditions I agree to the terms and conditions.

Verification

Heartland [Privacy Policy](#) | [Terms of Use](#)

- Click Next

- Verify Information
- Click Create Token

Heartland

Enter Payor Information

Payment Information

Verification

First Name	
Middle Initial	
Last Name	TEST ORGANIZATION
Payor Address	41 N PERRY ST
City	Dayton
Country	United States
State	Ohio
Postal Code	45422
Phone	
Email Address	cooperl@mcclerk.org

Account Number	xxxxxx7890
Routing Number	062000080
Name on Account	Test Organization
Account Type	Checking



Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Click Finish

Heartland

[Payment Receipt](#)

First Name	
Middle Initial	
Last Name	TEST ORGANIZATION
Address	41 N PERRY ST
City	Dayton
Country	United States
State	Ohio
Postal Code	45422
Phone	
Email Address	cooperl@mcclerk.org

Token created successfully!

Account Number	xxxxxx7890
Routing Number	062000080
Name on Account	Test Organization
Account Type	Checking



Heartland

[Privacy Policy](#) | [Terms of Use](#)

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

- Click Create Credit Card Token

Heartland

Token



Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Enter Credit Card Billing Information

Heartland

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

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

Payment Information

Verification

Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Click Next

- Click “I agree to the terms and conditions”

Heartland

[Credit Card Billing Information](#)

Payment Information

* - Required Field

Credit Card Number *   

Expiration Date * *

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 0.00%. The convenience fee is included in or has been added to your payment.

AUTHORIZATION

I agree to the terms and conditions.



Verification

Heartland [Privacy Policy](#) | [Terms of Use](#)

- Click Next

Heartland

[Credit Card Billing Information](#)

Payment Information

Verification

First Name	
Middle Initial	
Last Name	Test Organization
Payor Address	41 N. Perry Street
City	Dayton
Country	United States
State	Ohio
Postal Code	45422
Phone	
Email Address	cooperl@mcclerk.org
Credit Card Number	xxxxxxxxxxxx1111
Expiration Date	xx / xxxx
Name on Card	Test Organization
Card Verification Number	xxx



Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Click Create Token

Heartland

[Payment Receipt](#)

First Name
Middle Initial
Last Name Test Organization
Address 41 N. Perry Street
City Dayton
Country United States
State Ohio
Postal Code 45422
Phone
Email Address cooperl@mcclerk.org

Token created successfully!

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

Finish

Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Click Finish

- Enter an Account Description

Montgomery County Ohio Gregory A. Brush, Clerk of Courts Common Pleas Court, General Division eFiling user: Financial Administrator

Enter An Account Description

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

Home eFile Cases My Profile Admin Log Out user: Financial Administrator

Account Settings

Modify Account Settings

***Required Fields**

Company Name: *

Company Code: *

Address Line 1: *

Address Line 2:

Address Line 3:

City: * State:

Postal Code: * Country:

Note:

Wallets Accounts

Abbreviated Card No.	Description	Delete	Assign
1111	Credit Card 1111	<input type="button" value="Delete"/>	<input type="button" value="Assign"/>
7890	Checking 7890	<input type="button" value="Delete"/>	<input type="button" value="Assign"/>



- Check the boxes next to the Usernames you wish to have access to this method of payment

Account Settings >> Assign Credit Card Accounts

Assign Credit Card Accounts

Name	Username	Access to Card
Ackroyd, Allathea	aackroyd	<input type="checkbox"/>
Burkett, Amy	aburkett	<input checked="" type="checkbox"/>
Griffith, Amy	agriffit	<input checked="" type="checkbox"/>
Trost, April	asaettel	<input checked="" type="checkbox"/>
Scott, Ann	ascott	<input checked="" type="checkbox"/>
Cooper, L	attorney	<input checked="" type="checkbox"/>

- 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

Account Settings

Modify Account Settings

***Required Fields**

Company Name: *

Company Code *

Address Line 1: *

Address Line 2:

Address Line 3:

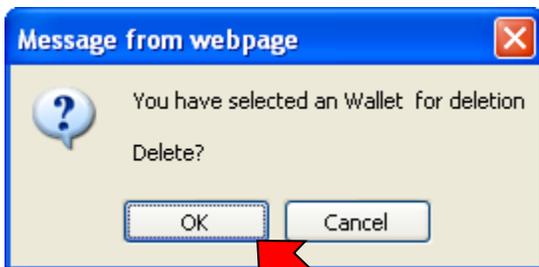
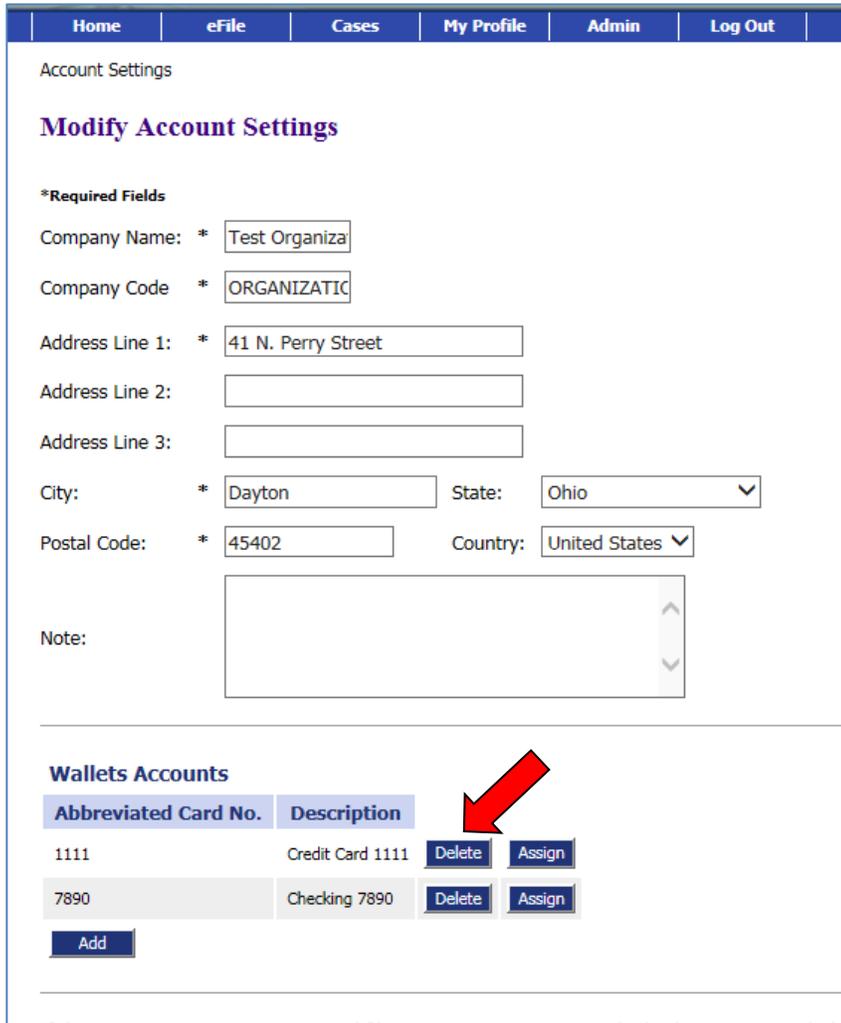
City: * State:

Postal Code: * Country:

Note:

Wallets Accounts

Abbreviated Card No.	Description		
1111	Credit Card 1111	<input type="button" value="Delete"/>	<input type="button" value="Assign"/>
7890	Checking 7890	<input type="button" value="Delete"/>	<input type="button" value="Assign"/>

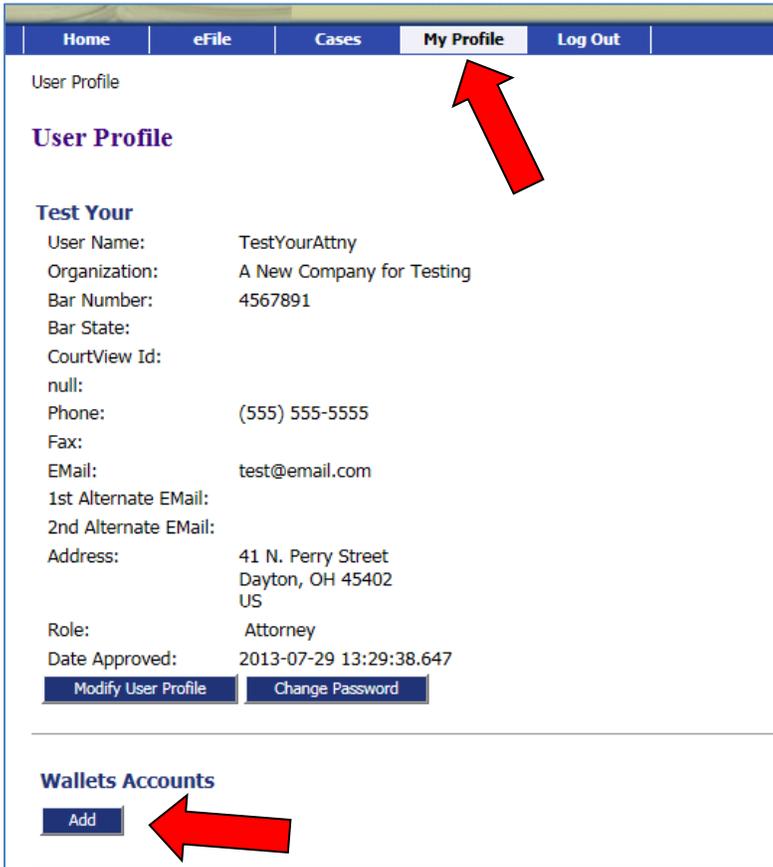


- Click OK
- Click the Home button at the top of the screen to return to the Home page

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



The screenshot shows the eFlex user interface. At the top, there is a navigation bar with tabs for Home, eFile, Cases, My Profile, and Log Out. The 'My Profile' tab is selected and highlighted with a red arrow. Below the navigation bar, the page title is 'User Profile'. Underneath, there is a section titled 'User Profile' with a sub-section 'Test Your' containing various user details. At the bottom of the page, there is a section titled 'Wallets Accounts' with an 'Add' button, which is also highlighted with a red arrow.

Home	eFile	Cases	My Profile	Log Out
User Profile				
User Profile				
Test Your				
User Name:	TestYourAttny			
Organization:	A New Company for Testing			
Bar Number:	4567891			
Bar State:				
CourtView Id:	null:			
Phone:	(555) 555-5555			
Fax:				
Email:	test@email.com			
1st Alternate Email:				
2nd Alternate Email:				
Address:	41 N. Perry Street Dayton, OH 45402 US			
Role:	Attorney			
Date Approved:	2013-07-29 13:29:38,647			
Modify User Profile		Change Password		
Wallets Accounts				
Add				

Checking Accounts:

- Click Create E-Check Token

Heartland

Token



Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Enter Payor Information

Heartland

[Enter Payor Information](#)

* - Required Field

First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Last Name	TEST ORGANIZATION
Payor Address	41 N PERRY ST
Country	United States <input type="button" value="v"/> *
State	Ohio <input type="button" value="v"/>
City	Dayton
Postal Code	45422 *
Phone	<input type="text"/>
Email Address	cooperl@mcclerk.org
Retype Email Address	cooperl@mcclerk.org

Payment Information

Verification

Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Click Next

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

Heartland

[Enter Payor Information](#)

Payment Information

Account Number * ACCOUNT OVER

Retype Account Number *

Routing Number * ?

Account Type *

Name on Account *

Terms and Conditions I agree to the terms and conditions.

Verification

Heartland [Privacy Policy](#) | [Terms of Use](#)

- Click Next

- Verify Information
- Click Create Token

Heartland

Enter Payor Information

Payment Information

Verification

First Name	
Middle Initial	
Last Name	TEST ORGANIZATION
Payor Address	41 N PERRY ST
City	Dayton
Country	United States
State	Ohio
Postal Code	45422
Phone	
Email Address	cooperl@mcclerk.org
Account Number	xxxxxx7890
Routing Number	062000080
Name on Account	Test Organization
Account Type	Checking



Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Click Finish

Heartland

[Payment Receipt](#)

First Name	
Middle Initial	
Last Name	TEST ORGANIZATION
Address	41 N PERRY ST
City	Dayton
Country	United States
State	Ohio
Postal Code	45422
Phone	
Email Address	cooperl@mcclerk.org

Token created successfully!

Account Number	xxxxxx7890
Routing Number	062000080
Name on Account	Test Organization
Account Type	Checking



Heartland

[Privacy Policy](#) | [Terms of Use](#)

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

- Click Create Credit Card Token

Heartland

Token



Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Enter Credit Card Billing Information

Heartland

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

Payment Information

Verification

Heartland [Privacy Policy](#) | [Terms of Use](#)

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



- Click Next

- Click on Accept Terms

Heartland

[Credit Card Billing Information](#)

Payment Information

* - Required Field

Credit Card Number *   

Expiration Date * *

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 0.00%. The convenience fee is included in or has been added to your payment.

AUTHORIZATION

I agree to the terms and conditions.



Verification

Heartland [Privacy Policy](#) | [Terms of Use](#)

- Click Next

Heartland

[Credit Card Billing Information](#)

Payment Information

Verification

First Name	
Middle Initial	
Last Name	Test Organization
Payor Address	41 N. Perry Street
City	Dayton
Country	United States
State	Ohio
Postal Code	45422
Phone	
Email Address	cooperl@mcclerk.org
Credit Card Number	xxxxxxxxxxxx1111
Expiration Date	xx / xxxx
Name on Card	Test Organization
Card Verification Number	xxx



Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Click Create Token

Heartland

[Payment Receipt](#)

First Name
Middle Initial
Last Name Test Organization
Address 41 N. Perry Street
City Dayton
Country United States
State Ohio
Postal Code 45422
Phone
Email Address cooperl@mcclerk.org

Token created successfully!

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

Finish

Heartland

[Privacy Policy](#) | [Terms of Use](#)

- Click Finish

Using an Established Wallet

- Select the account to use
- Click Next

Ohio Common Pleas Court, General Division

Home eFile Cases My Profile Log Out user:

Home ⇒ New Case Filing: Court - Division ⇒ Case Initiation ⇒ Add a Document ⇒ Review and Approve Filing

Review and Approve Filing

Case Type : Civil

Payment Method:

Complaint \$300.00
eFiling fee: \$0.00
Total Charge:

Accounts:
 Waiver: Affidavit of Indigency allows payment to be waived

Filing Information: [Change Filing Info](#)

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

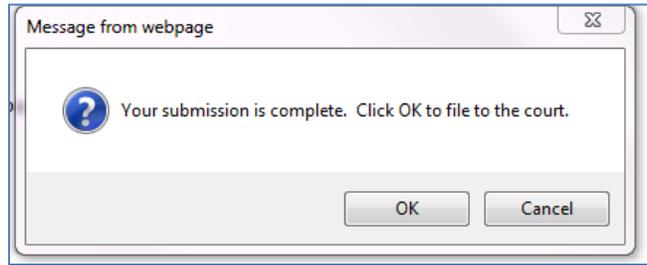
Document Name	View Document
Case Information Sheet	View Generated Document
Complaint TEST	1 COMPLAINT.pdf
Instructions for Service on a New Case CERTIFIED MAIL	View Generated Document

Special Filing Instructions:

[Back](#) [Cancel \(Delete\)](#) [Move to Draft](#) [Next](#)

- Click Next

- Click Ok



- Click on Filing Status

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

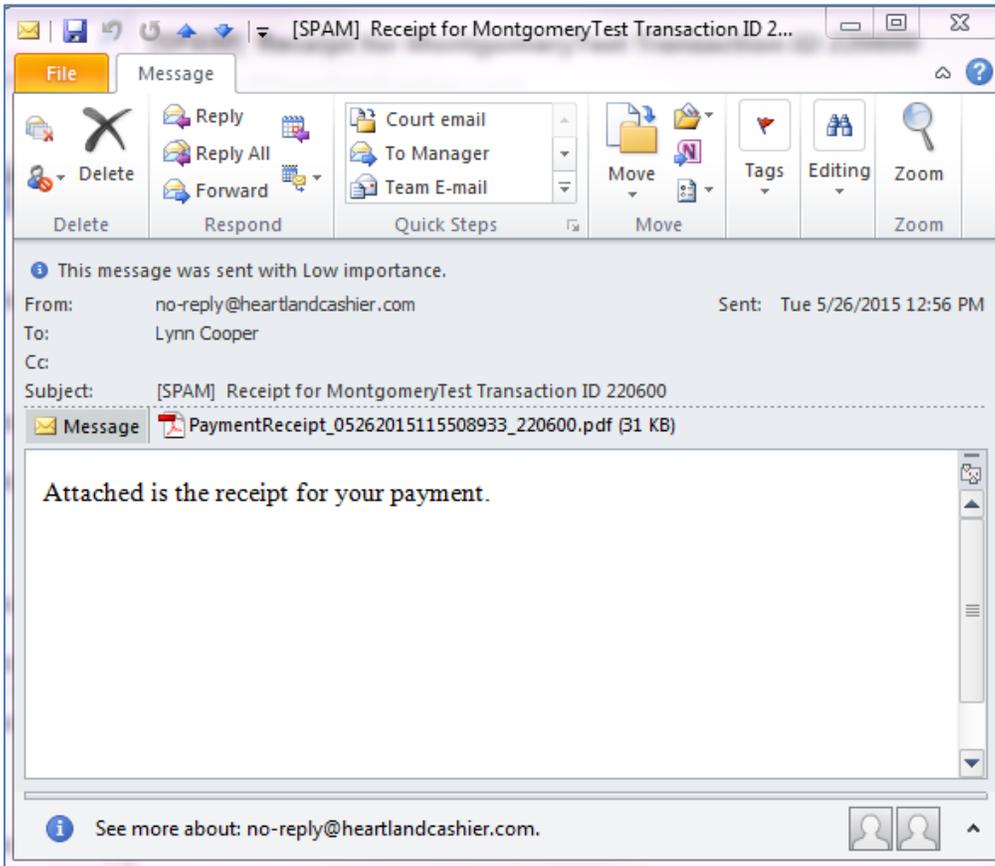


* Receipt Pending – Package approved but submission experiencing technical problems at the Clerk’s Office – Clerk staff working on the issue and will contact the filer if necessary

* 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

My Filings Between 05/28/2015 and Today

<input type="checkbox"/>	Submitted	Documents	Filer Ref No.	Case Title	Case Number	Status	
<input type="checkbox"/>	05-28-2015:01:09:14 PM	<input type="checkbox"/> Case Information Sheet	45789			Awaiting Approval	
<input type="checkbox"/>	05-28-2015:08:03:15 AM	<input type="checkbox"/> Case Information Sheet	123456			Rejected	<input type="button" value="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**

