Cuyahoga County Probate Court E-File Department

# E-FIRM ACCOUNT SETUP

For Lawyers and Law Offices

## What is an E-Firm account?

An E-Firm account allows law firms to list with the Court authorized credit cards and users, for filings with the Probate Court E-File Gateway System.

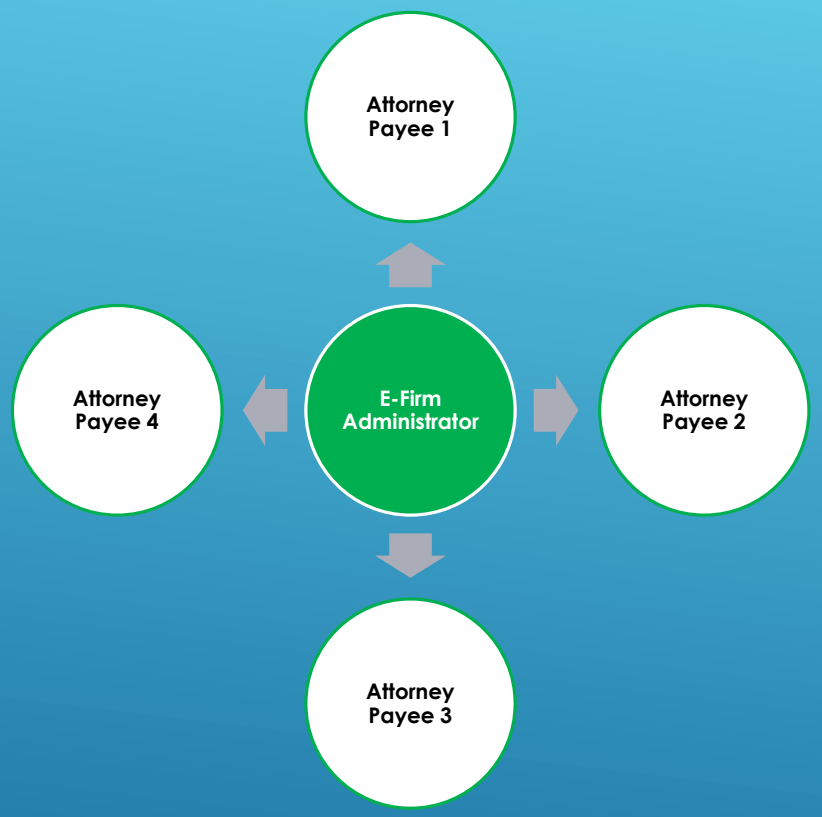
An attorney *Administrator* manages and updates the available cards and *Payee* users as needed.

All *Administrators* and *Payees* must be attorneys registered to E-File with the Probate Court.
Credit cards may be in the name of a law firm or an individual attorney.

## Is this a draw-down account?

An E-Firm account is not a draw-down account. It is a user-managed list which ensures payments by associates are not flagged unnecessarily by the Court as unsecured third party payments.

The E-File Department does not store credit card numbers. Only the last four digits are displayed with the names of *Payees* added by each *Administrator*.




**First** register by phone or email your E-Firm Account Name, and the names of each Account Administrator.

(216) 443-8948 or probate_efile@cuyahogacounty.us

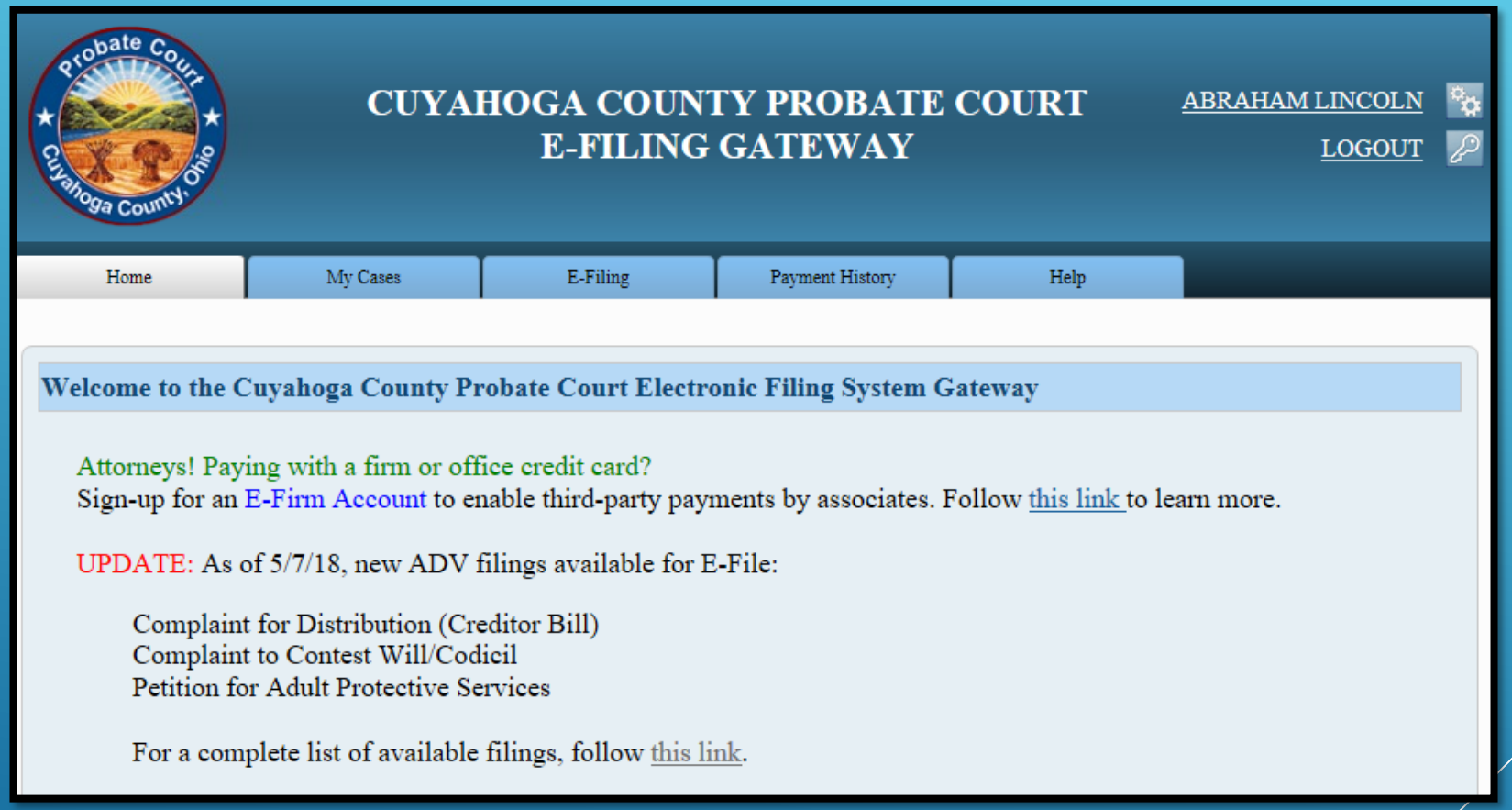
**Next** the Court will approve the Account and send a confirmation email to each Administrator.

**Then** Administrators can access and manage their Account through their E-File Profile Settings.

**Once the email confirmation is received, the following slides will guide you through the E-Firm setup**

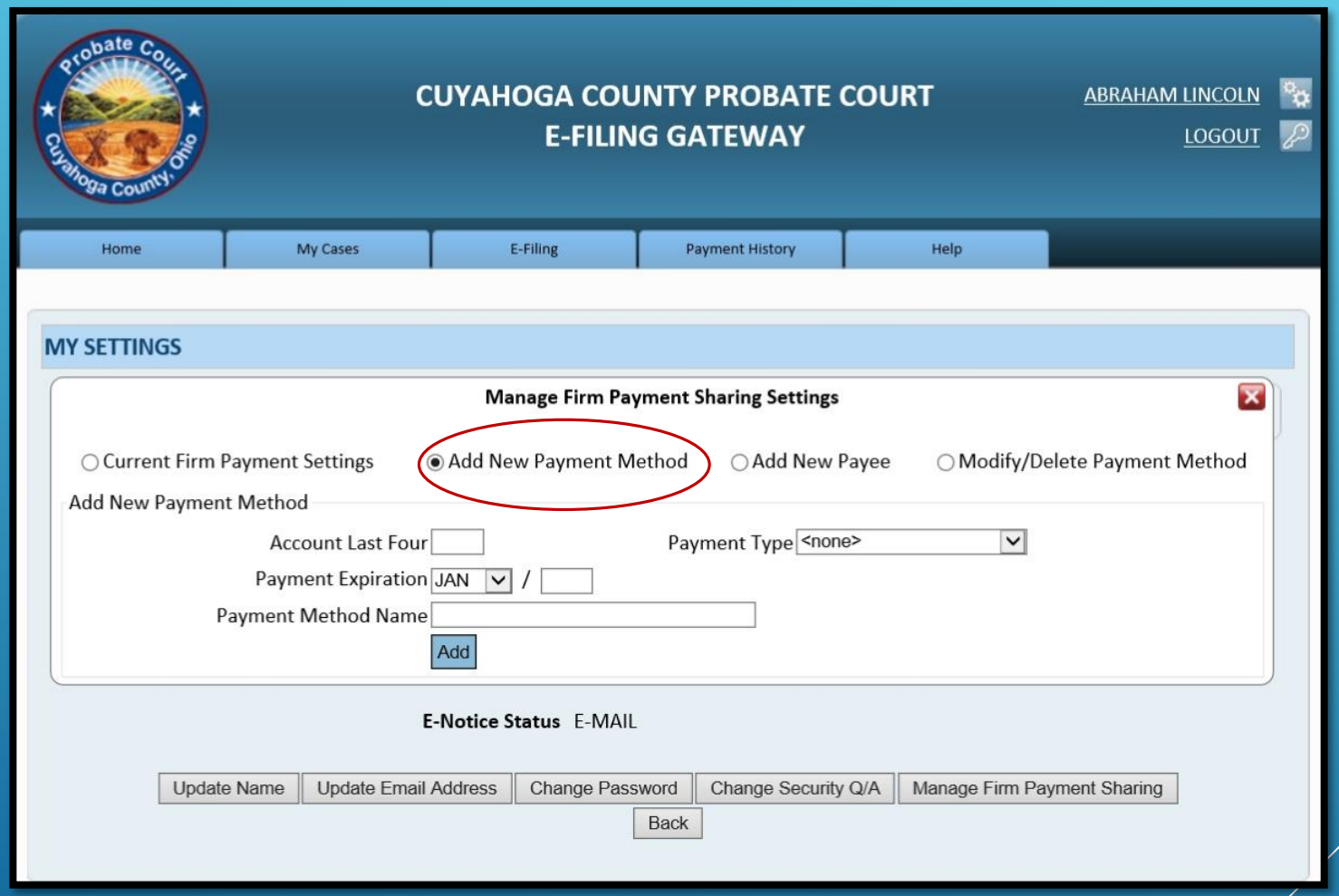
# After receiving a confirmation email, the Administrator will log in to E-File

# Click your name to access User Properties

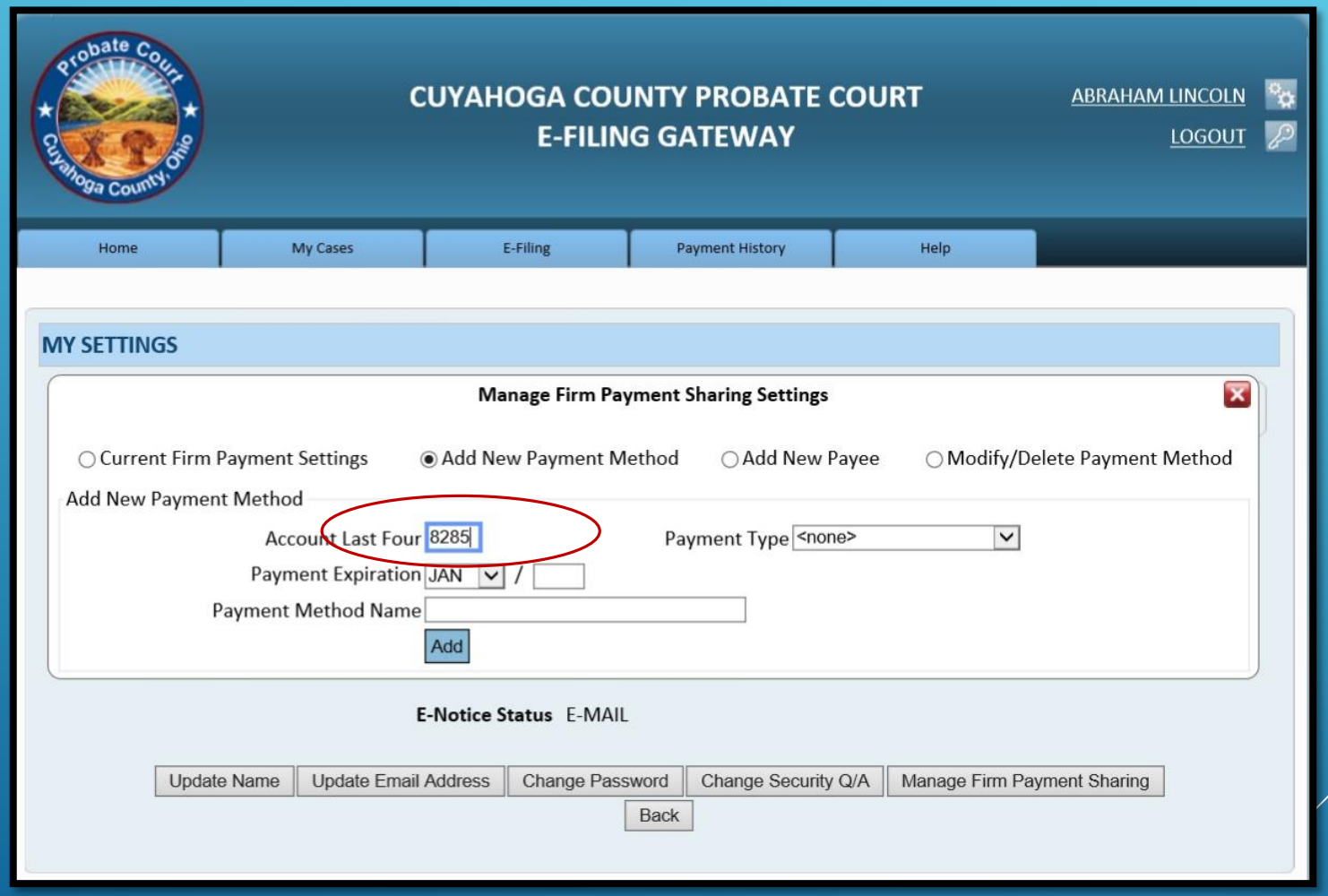


# Click Manage Firm Payment Sharing

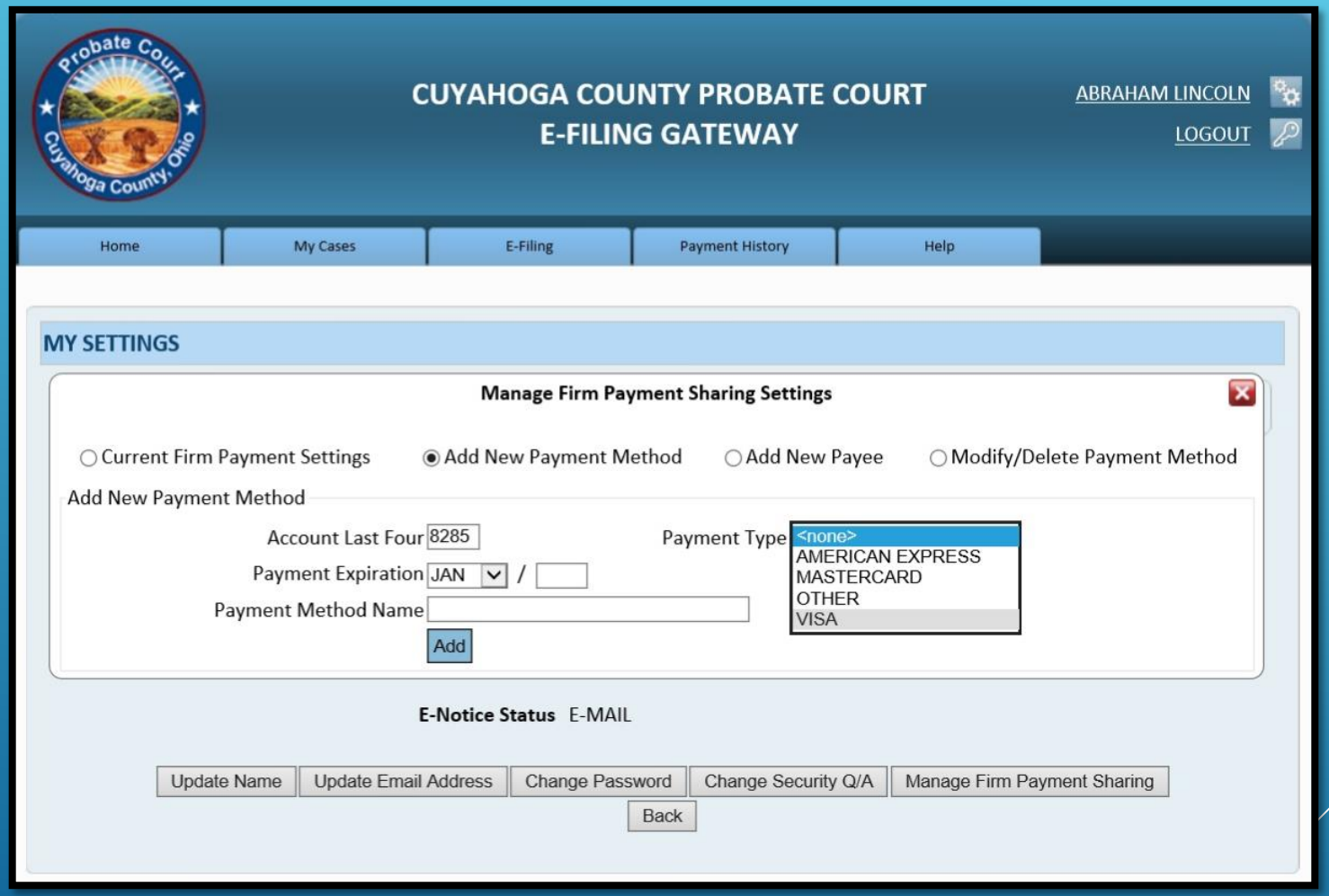
# Select Add New Payment Method



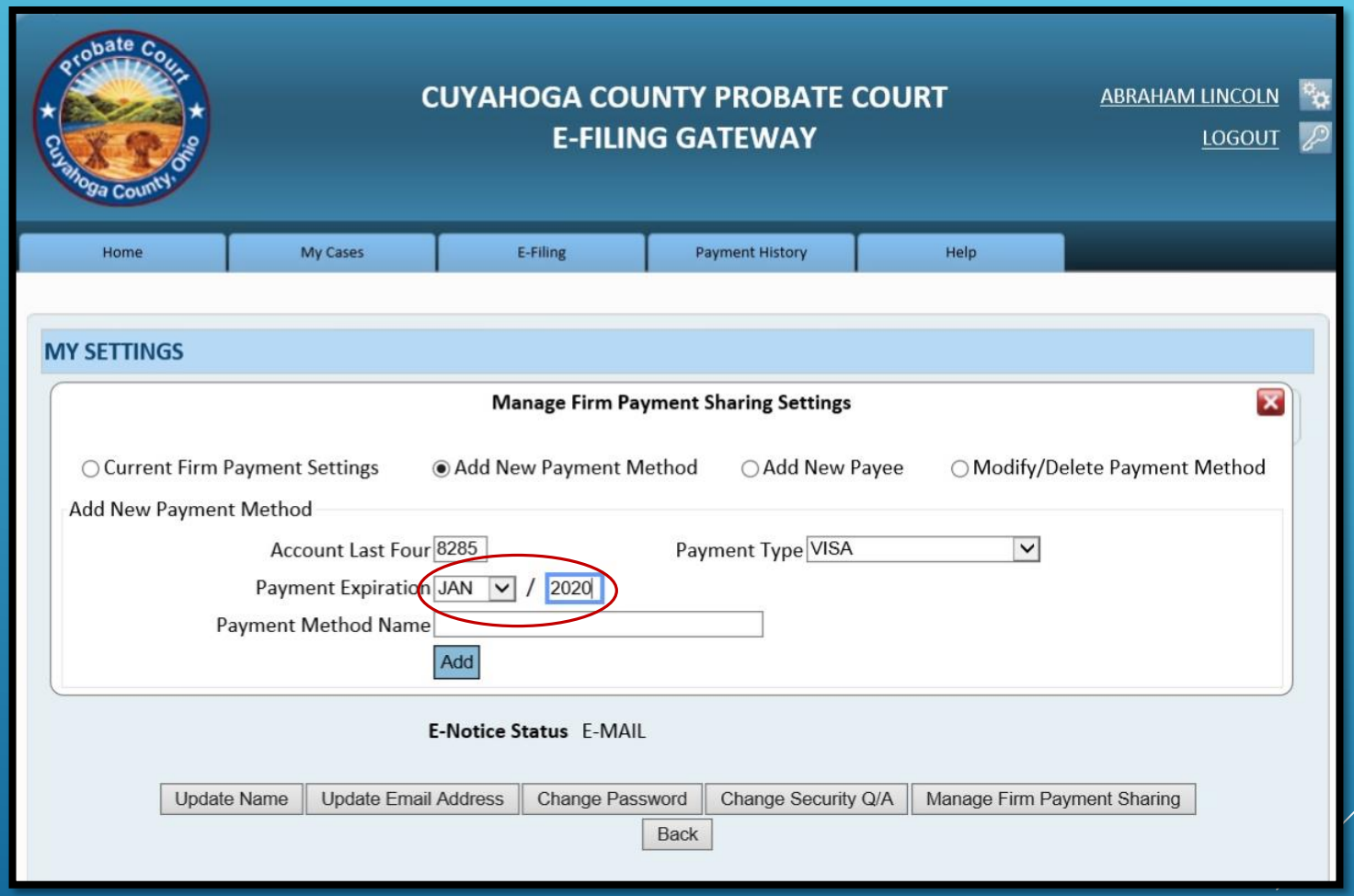
# Enter last four digits of the credit card



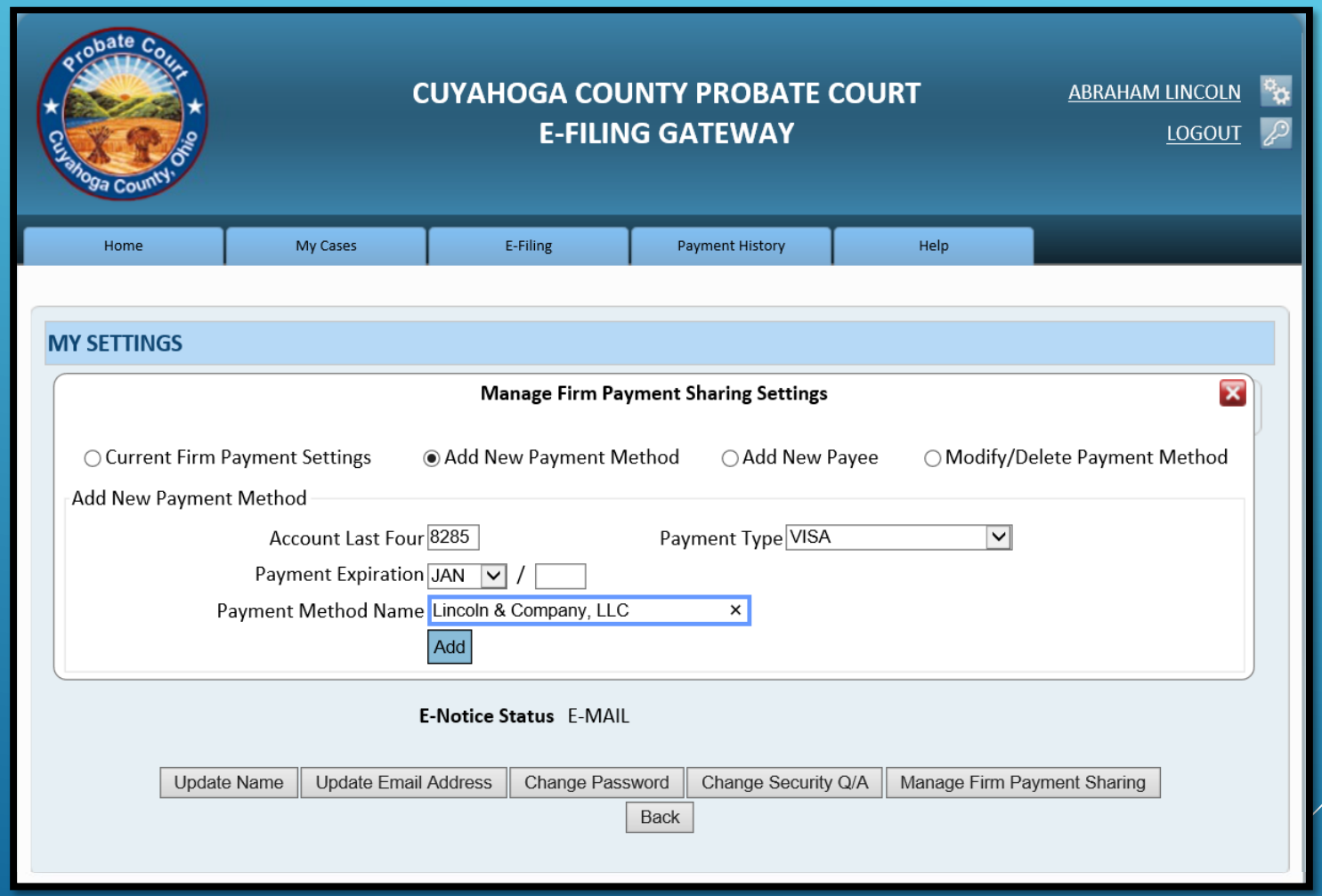
# Select the Payment Type



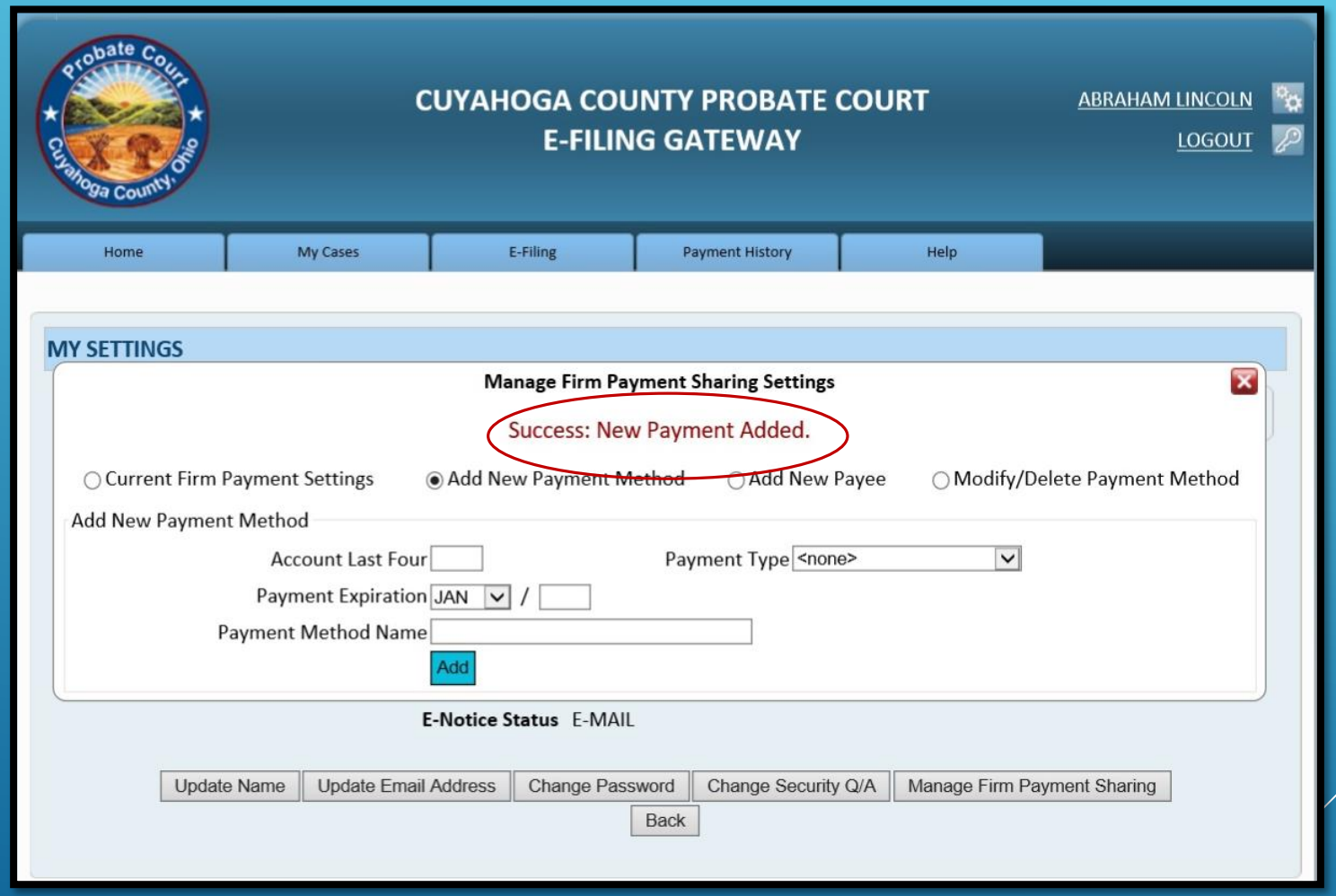
# Enter the Payment Expiration Month and Year



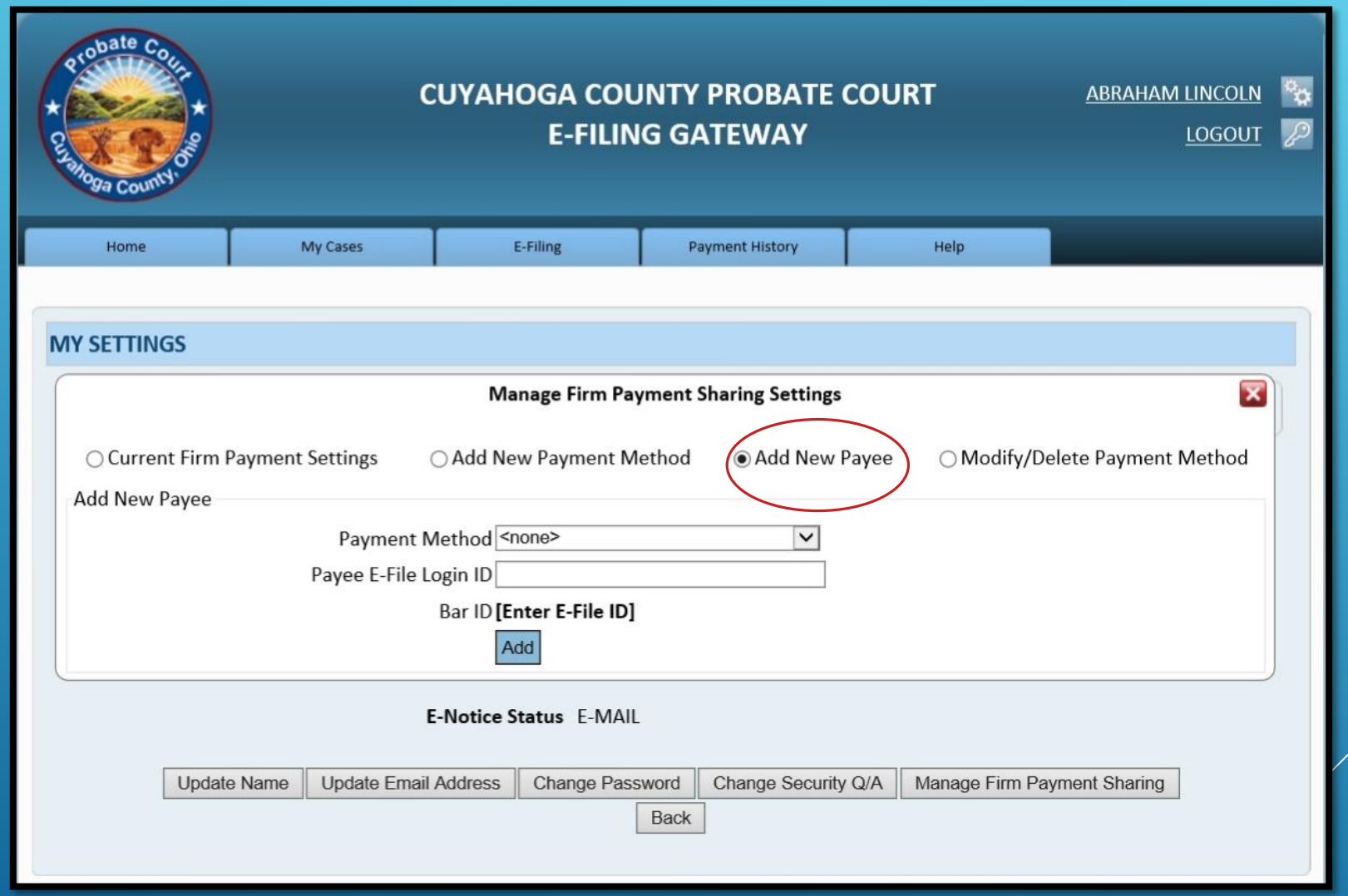
# Enter the Payment Method Name



# Click Add - New Payment Added!



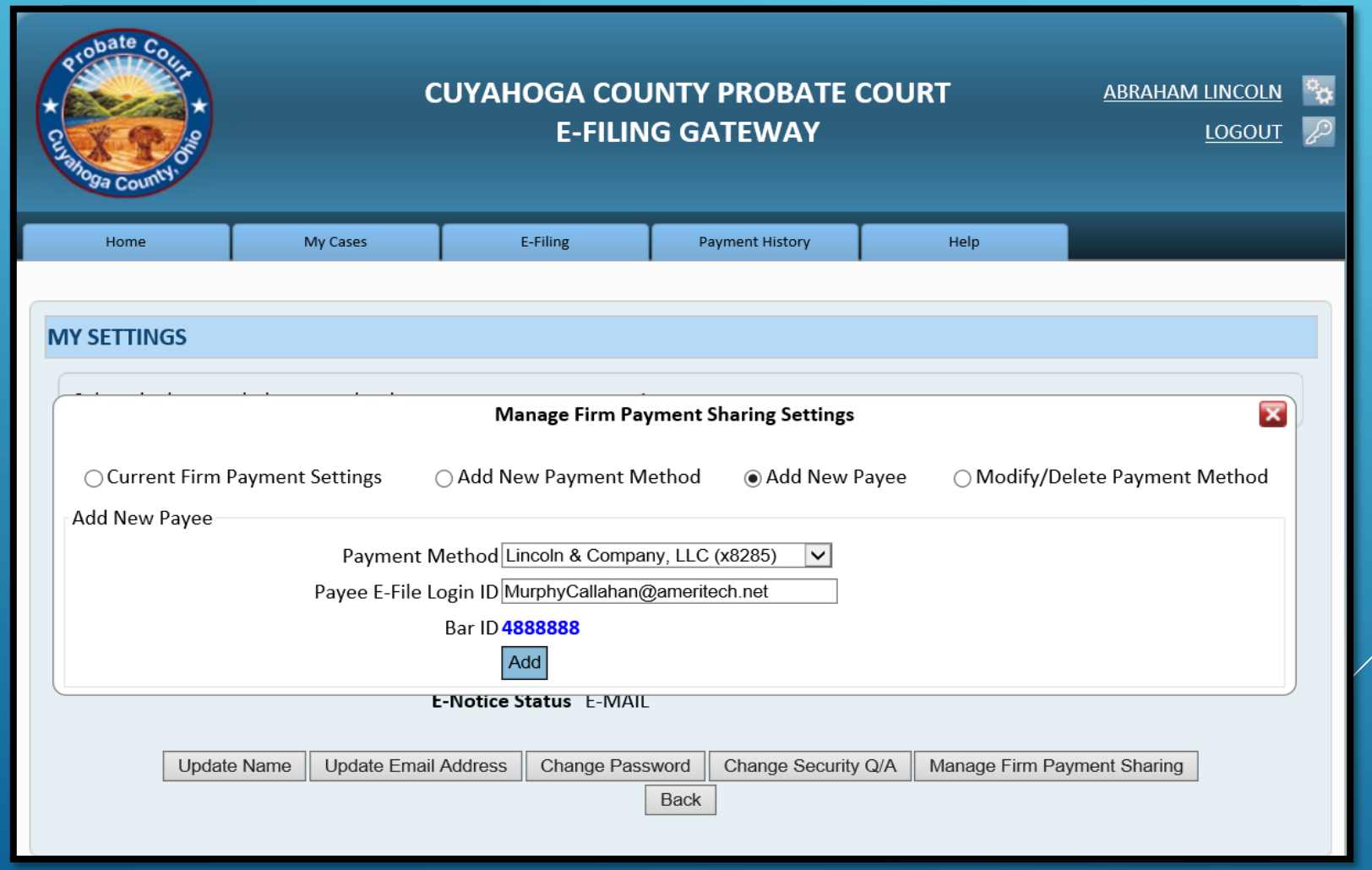
# Select Add New Payee



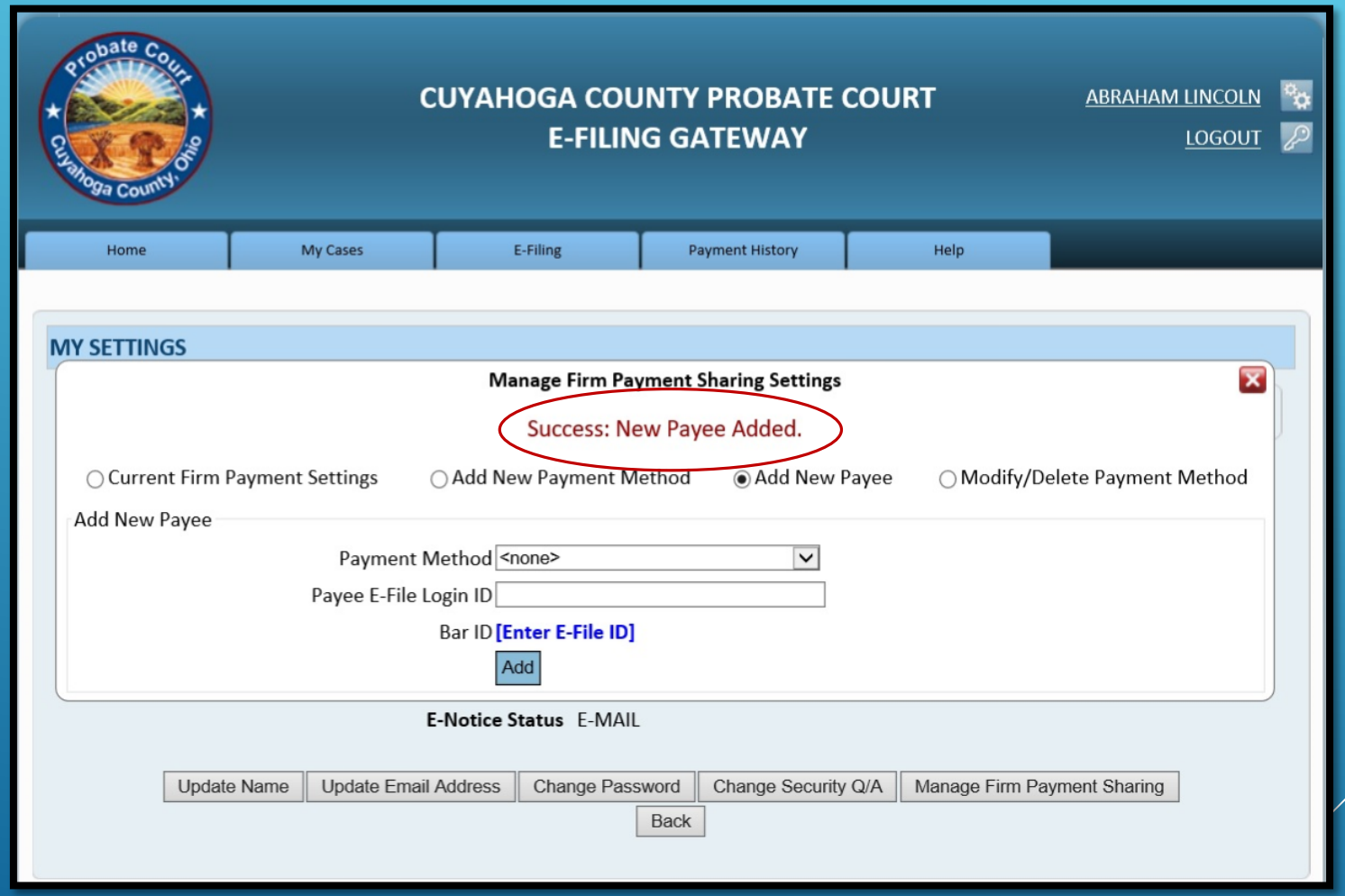
# Select Payment Method

# Enter the *Payee's* E-File Login ID (email address)

## Click Add – *Payee's* Ohio Supreme Court Bar ID will display

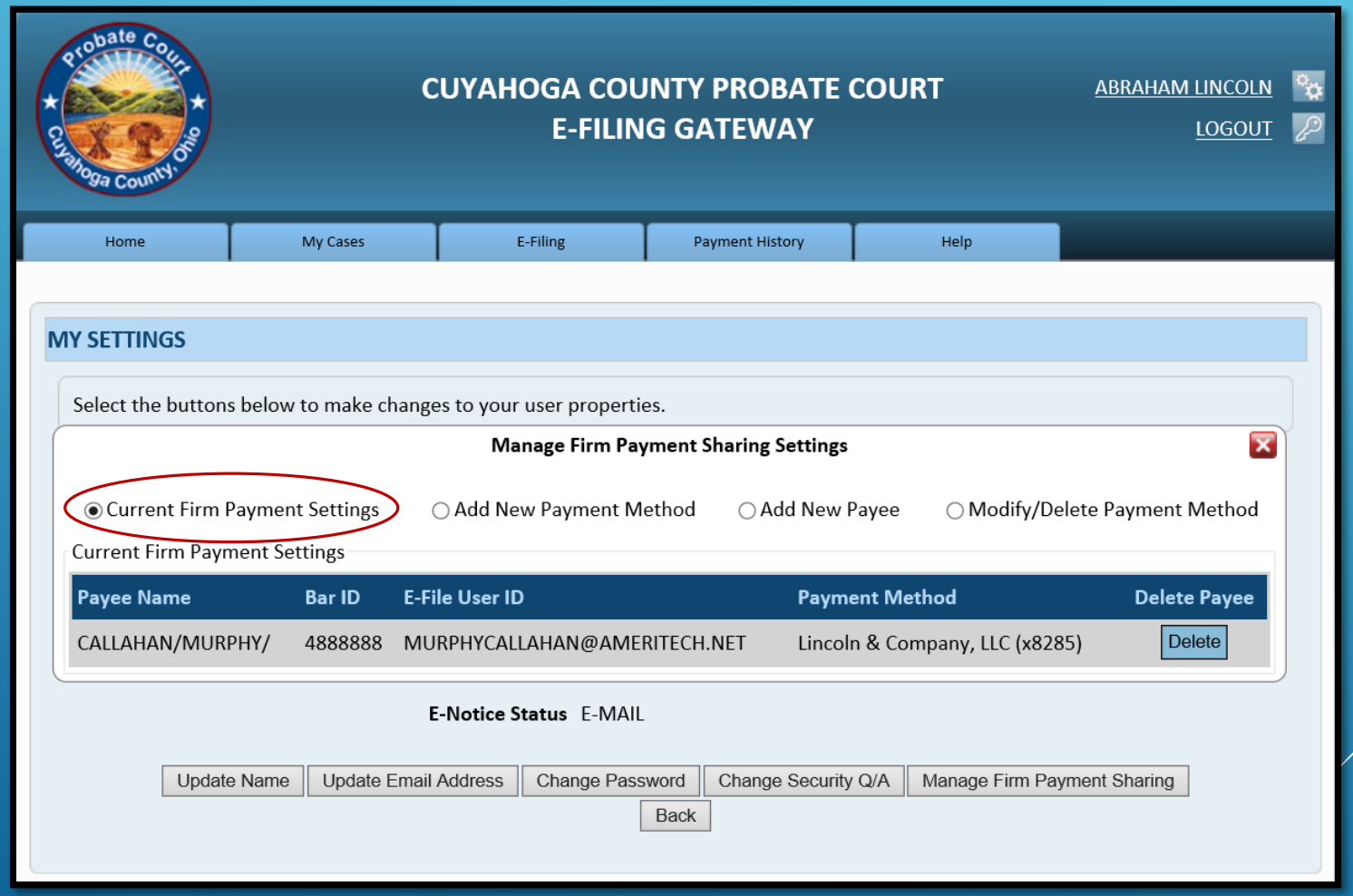


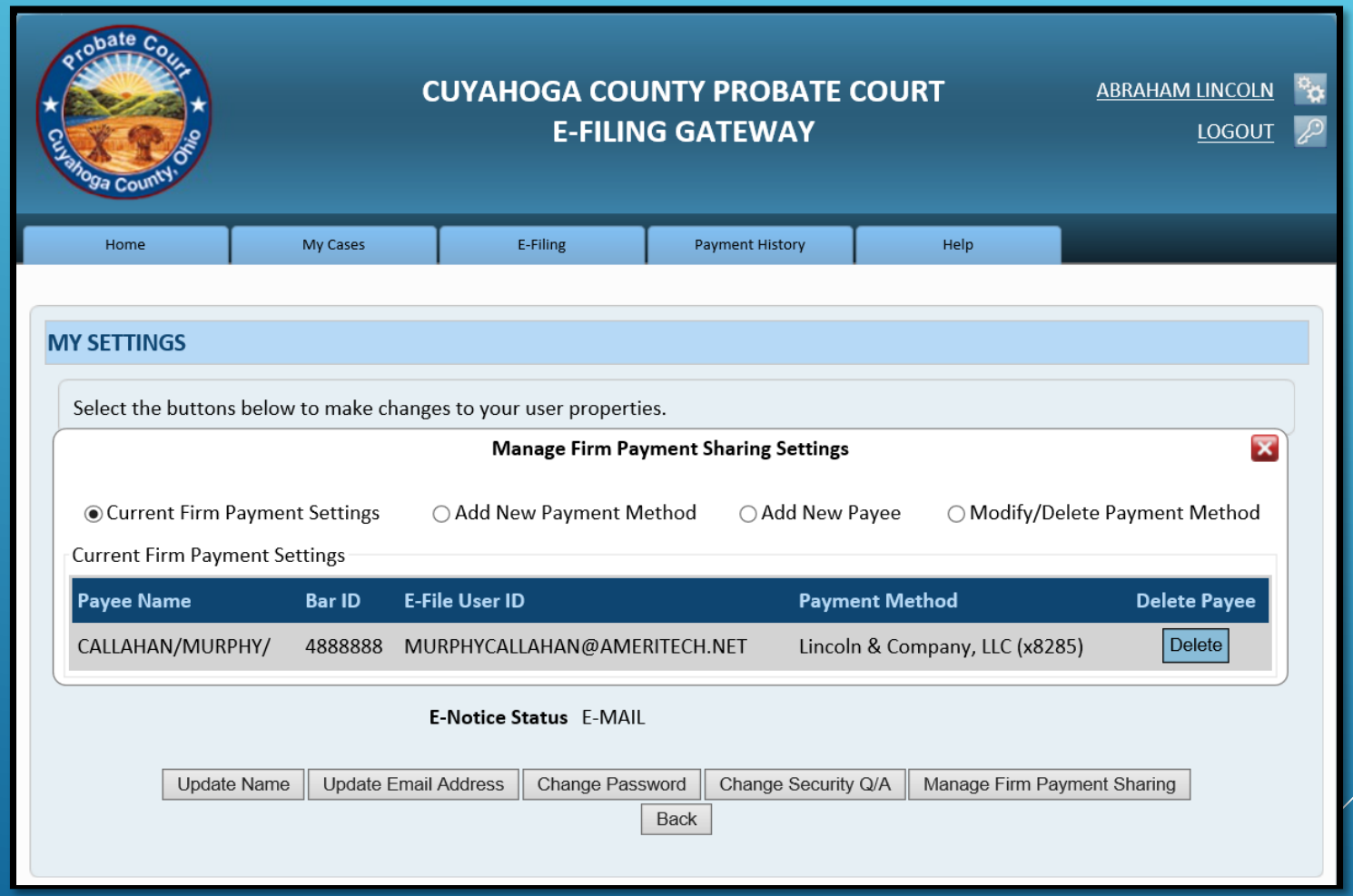
# Click Add again - New Payee Added!



# Select Current Firm Payment Settings

## (to view your stored *Payees* and Payment Method)



# Click ✖ to close *Firm Payment Sharing Settings*

# Click Back to exit User Properties