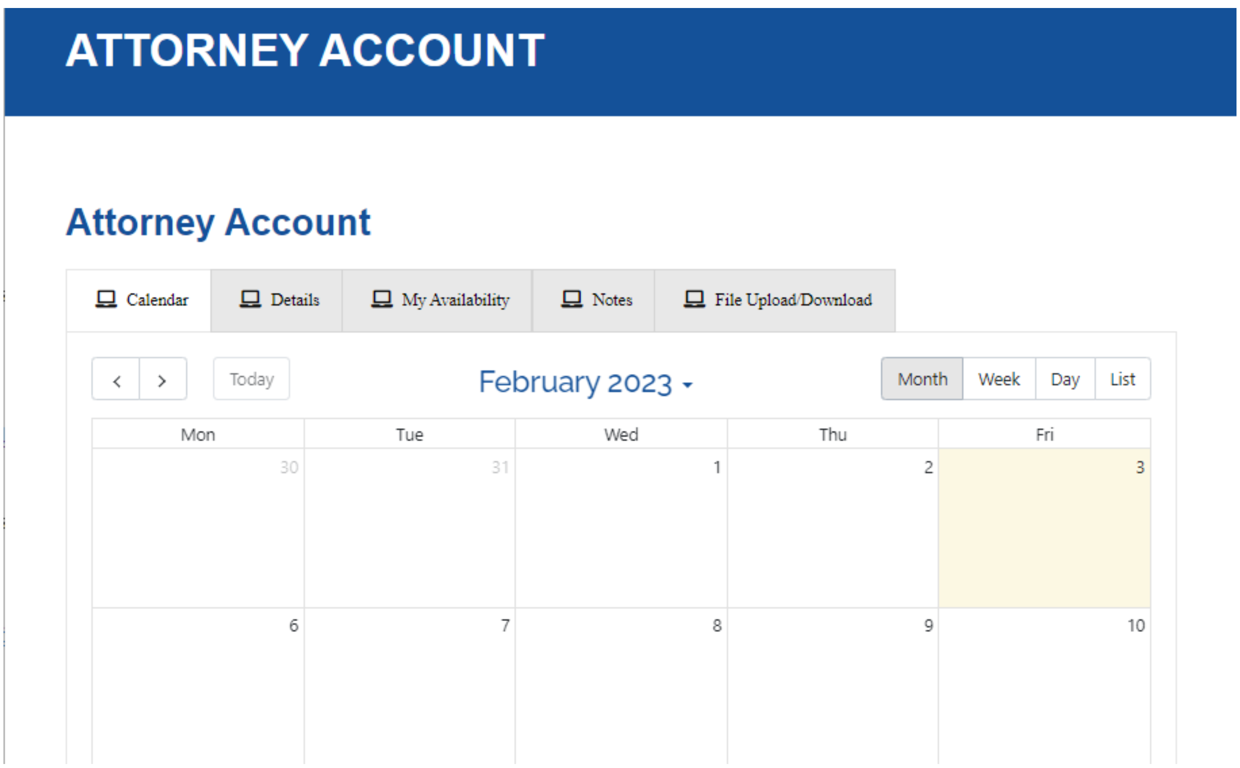
SOUTHERN DISTRICT OF FLORIDA
BANKRUPTCY PRO SE ASSISTANCE CLINIC

VOLUNTEER ATTORNEY
USER GUIDE

Thank you for your interest and willingness to provide pro bono consultations to pro se filers in the Southern District of Florida Bankruptcy Pro Se Assistance Clinic.

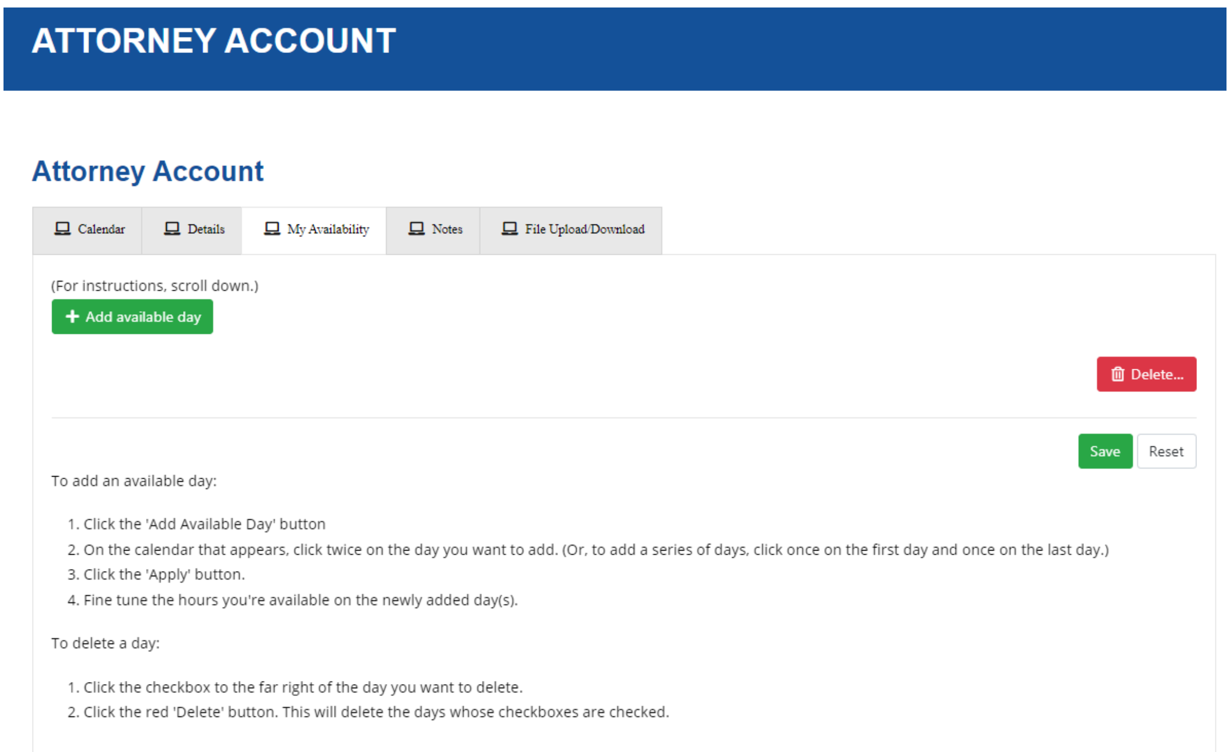
The guidance and screenshots provided herein have been established to help familiarize you with the various screens you have access to in your user account.

When you login to the Clinic website, you will see the following screen. The tabs you will use the most often are ***"My Availability," "Notes,"*** and ***"File Upload/Download"*** which are further explained below.



<u>My Availability Tab</u>

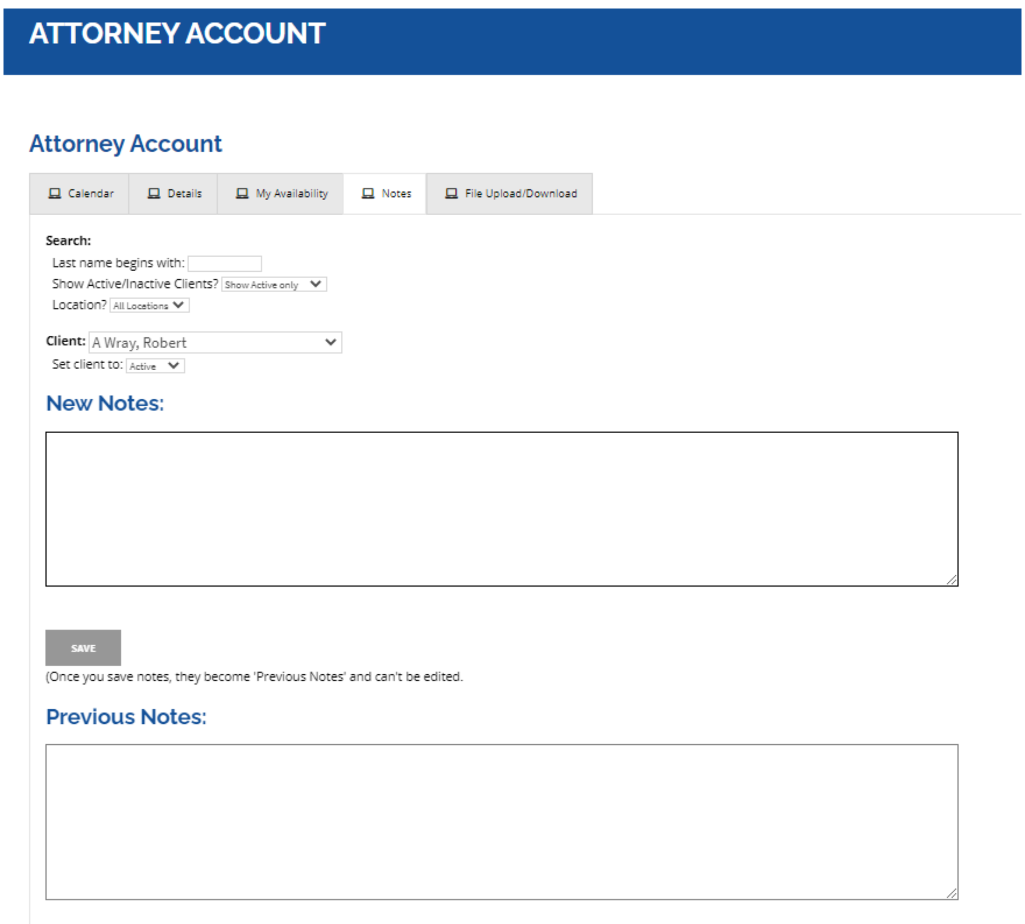
This is where you set up your appointment availability, as well as break times during those periods. Please do not schedule appointment availability using the ***"Calendar"*** tab as this does not allow pro se clients to select these appointments. All appointment availability is set up under the ***"My Availability"*** tab. Follow the instructions at the bottom of the screen to add available days and/or delete scheduled days, as necessary. Be sure to click the green "Save" button to save any changes.



Notes Tab

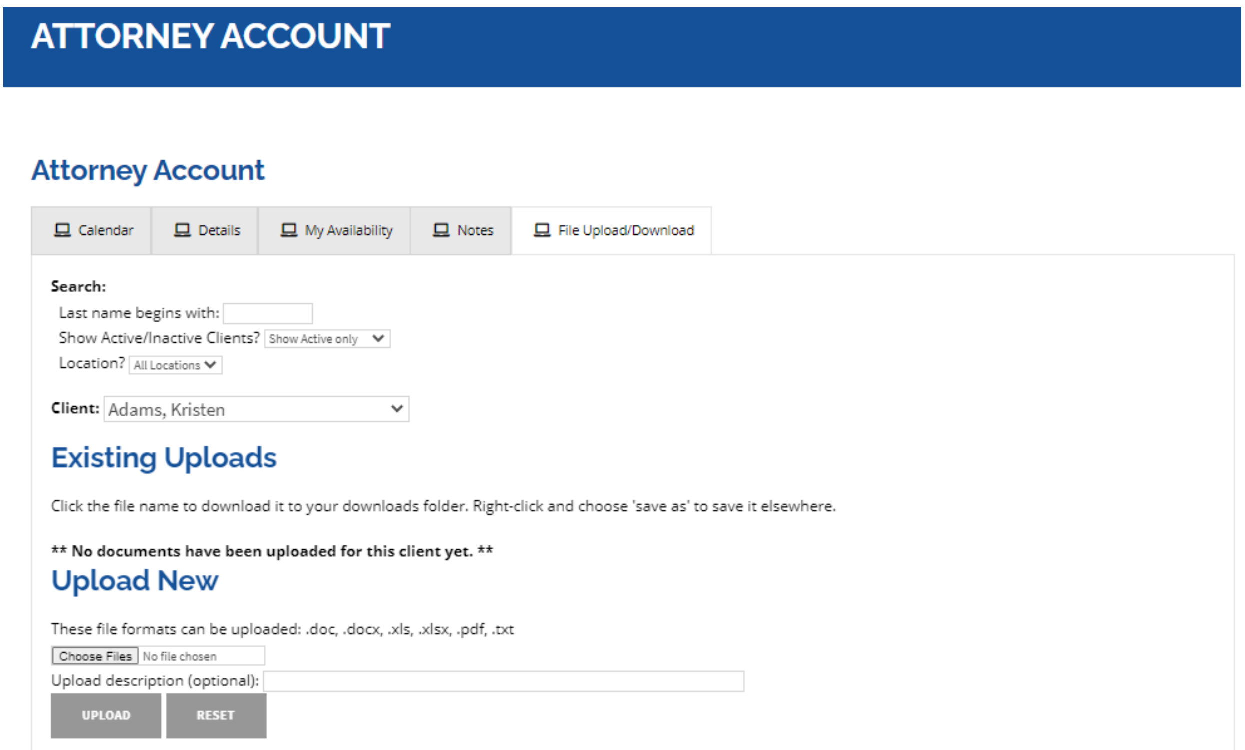
Use this tab to record notes during or after the consultation by selecting the pro se client's name from the Client dropdown. Notes are added in the New Notes field. Click "Save" when finished adding the notes. Please be aware that once notes have been saved, they become Previous Notes and cannot be edited. Feel free to add anything in the notes that might be beneficial for future appointments, including whether or not the pro se client appears to be abusing the system.

If the pro se client was previously seen by another attorney and notes were added, they will be contained in the Previous Notes field along with the name of the attorney who entered the notes and the date and time of entry. Notes contained in the Previous Notes field are viewable by Clinic attorneys but are not viewable by the pro se clients.



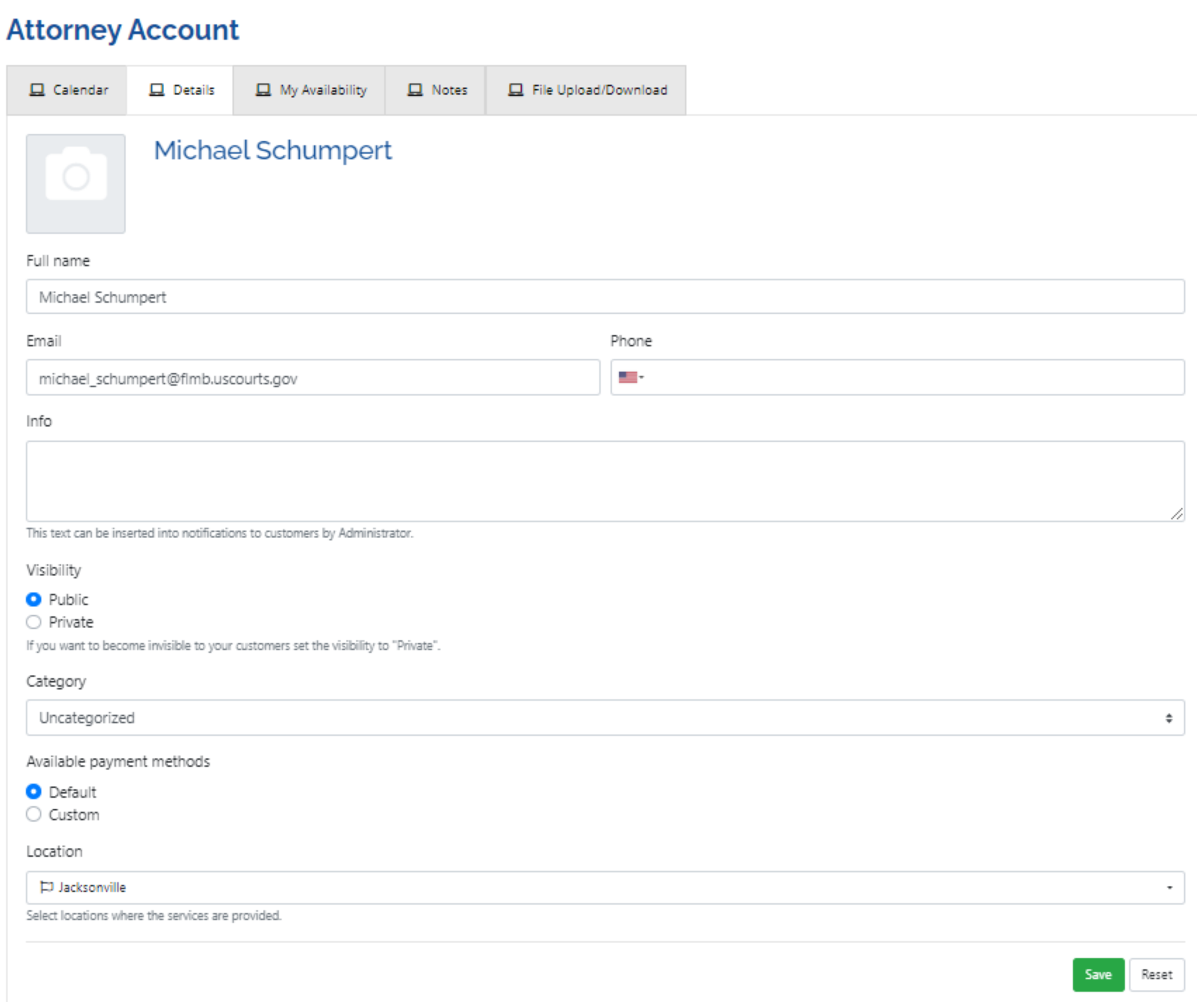
File Upload/Download Tab

Both attorney volunteers and pro se clients may upload or download files. Once the pro se client's name is selected from the Client dropdown list, follow the instructions contained on the screen to either download existing uploaded files, or upload new files. The documents can be in any of the following formats: .doc, .docx, .xls, .xlxs, .pdf, or .txt.



Details Tab

Not used as often is the “Details” tab. You may use this tab to expand your appointment availability to more than one division within the Middle District. For example, if you tend to practice primarily in Orlando, but would like to offer appointments in one or more of the other divisions, click the dropdown list in the Location field at the bottom of the screen and click to select the applicable divisions. Click “Save” to record any changes made.



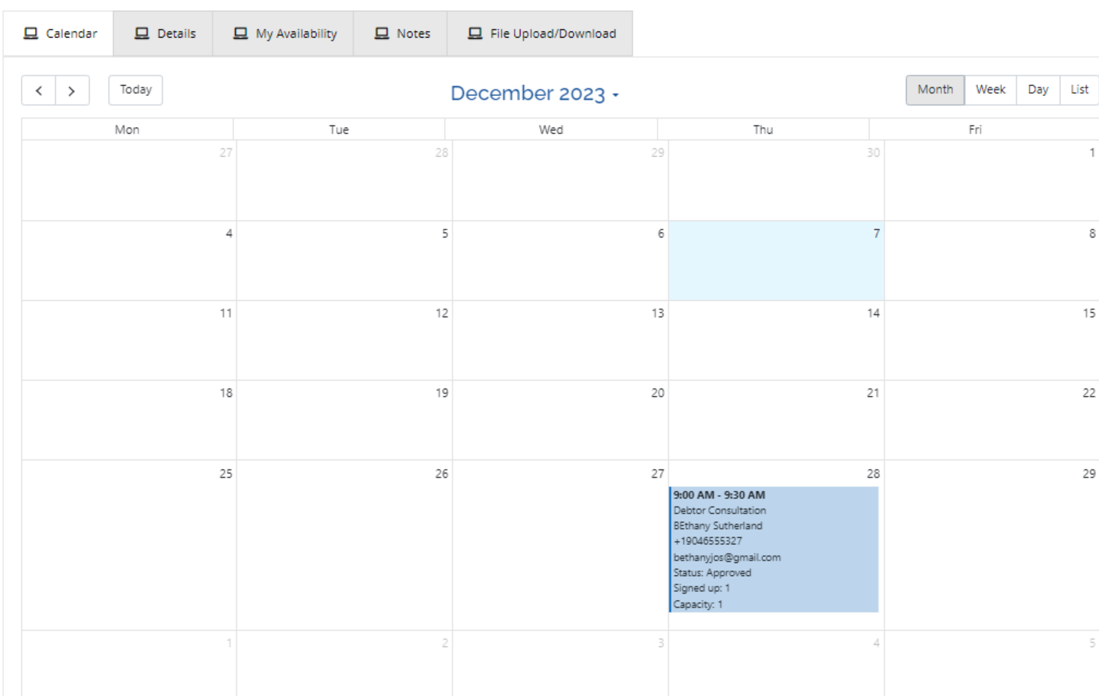
Once you have established your appointment availability, the next step is for a pro se client to schedule an appointment with you.

When this happens, you will receive an email with the date and time of the appointment, the debtor's name, their phone number and email address, and the type of service requested, i.e., Debtor or Creditor consultation. If the client has filed a case, their case number should be included in the email for your reference.

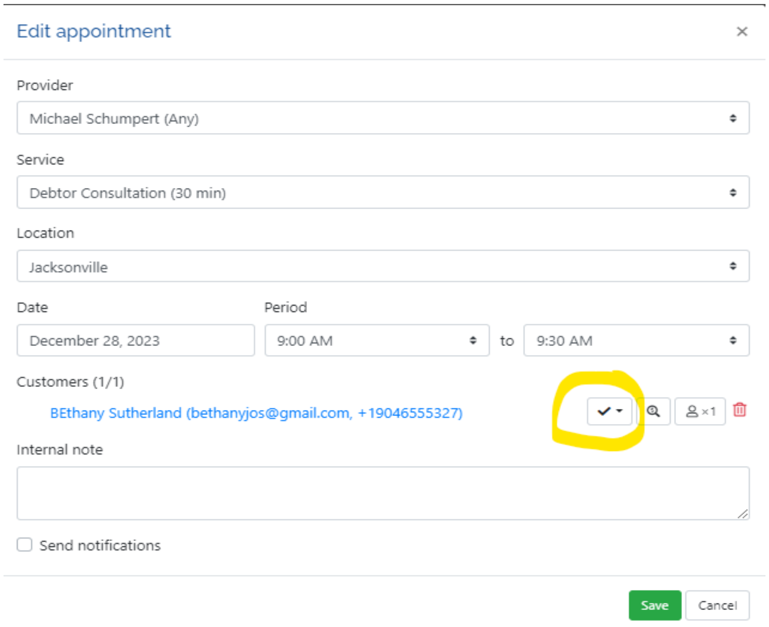
You will then contact the client at the appointment time at the phone number provided by the client. You may also set up a Zoom meeting if you prefer.

If the appointment is canceled for any reason, it is requested that you record this to ensure end-of-month statistical information is correct.

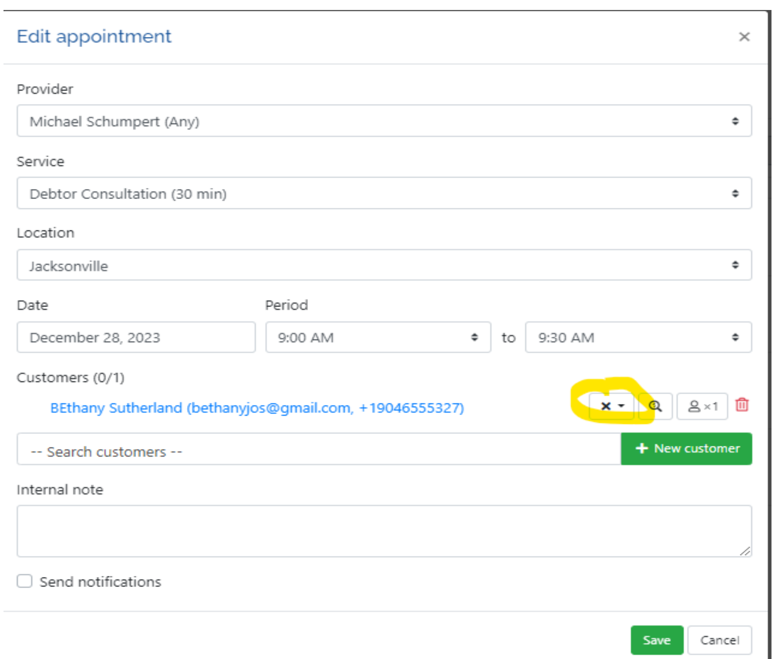
To record a booking cancellation, click to select the appointment time from the Calendar tab in your user account:



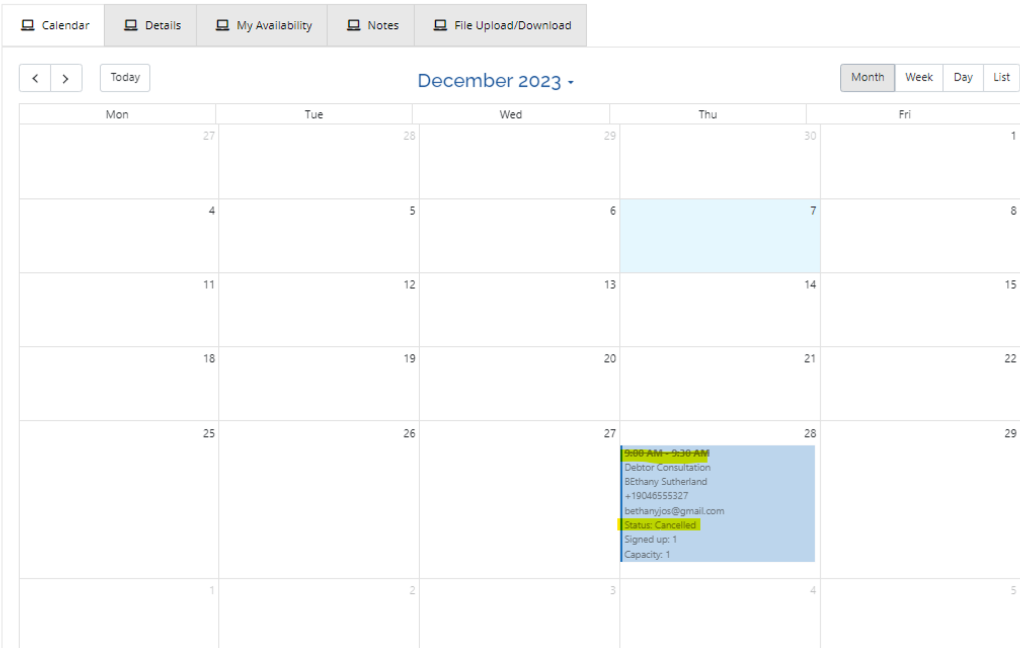
When the next screen appears, you will see a check mark in the box circled below:



Click the dropdown arrow and select “Cancel,” which turns the check mark into an “X” and then click “Save”:



The appointment status will reflect “Cancelled”



If you have any questions, please email John Schumpert, Executive Director, at info@bankruptcyproseclinicfls.com

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