

**SOUTHERN DISTRICT OF FLORIDA  
BANKRUPTCY PRO SE ASSISTANCE CLINIC**



SOUTHERN DISTRICT OF FLORIDA  
**BANKRUPTCY**  
PRO SE 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.

The screenshot displays the 'Attorney Account' interface. At the top, there is a dark blue header with the text 'ATTORNEY ACCOUNT' in white. Below this, the page title 'Attorney Account' is shown in blue. A navigation bar contains five tabs: 'Calendar', 'Details', 'My Availability', 'Notes', and 'File Upload/Download'. The 'Calendar' tab is active. The calendar view shows 'February 2023' with navigation arrows and a 'Today' button. The calendar grid has columns for 'Mon', 'Tue', 'Wed', 'Thu', and 'Fri'. The dates 30, 31, 1, 2, and 3 are visible in the first row, and 6, 7, 8, 9, and 10 in the second row. The date '3' (Friday) is highlighted in yellow.

Mon	Tue	Wed	Thu	Fri
30	31	1	2	3
6	7	8	9	10

## My Availability Tab

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.

## ATTORNEY ACCOUNT

### Attorney Account

Calendar Details **My Availability** Notes File Upload/Download

(For instructions, scroll down.)

[+ Add available day](#)

[Delete...](#)

[Save](#) [Reset](#)

To add an available day:

1. Click the 'Add Available Day' button
2. On the calendar that appears, click twice on the day you want to add. (Or, to add a series of days, click once on the first day and once on the last day.)
3. Click the 'Apply' button.
4. Fine tune the hours you're available on the newly added day(s).

To delete a day:

1. Click the checkbox to the far right of the day you want to delete.
2. Click the red 'Delete' button. This will delete the days whose checkboxes are checked.

## 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.

## ATTORNEY ACCOUNT

### Attorney Account

Calendar Details My Availability Notes File Upload/Download

**Search:**  
Last name begins with:   
Show Active/Inactive Clients? Show Active only   
Location? All Locations   
Client: A Wray, Robert   
Set client to: Active

**New Notes:**

(Once you save notes, they become 'Previous Notes' and can't be edited.)

**Previous Notes:**

## 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, .xlsx, .pdf, or .txt.

## ATTORNEY ACCOUNT

### Attorney Account

Calendar Details My Availability Notes File Upload/Download

**Search:**  
Last name begins with:   
Show Active/Inactive Clients? Show Active only   
Location? All Locations

**Client:** Adams, Kristen

### Existing Uploads

Click the file name to download it to your downloads folder. Right-click and choose 'save as' to save it elsewhere.

**\*\* No documents have been uploaded for this client yet. \*\***

### Upload New

These file formats can be uploaded: .doc, .docx, .xls, .xlsx, .pdf, .txt

No file chosen


Upload description (optional):

## 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.

### Attorney Account

Calendar Details My Availability Notes File Upload/Download

Michael Schumpert

Full name

Email

Phone

Info

This text can be inserted into notifications to customers by Administrator.

Visibility

Public  
 Private

If you want to become invisible to your customers set the visibility to "Private".

Category

Available payment methods

Default  
 Custom

Location

Select locations where the services are provided.

Save Reset

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:

The screenshot displays a web-based calendar interface for December 2023. At the top, there are navigation tabs: "Calendar", "Details", "My Availability", "Notes", and "File Upload/Download". Below the tabs, there are navigation controls including left and right arrows, a "Today" button, the month name "December 2023", and view options for "Month", "Week", "Day", and "List". The calendar grid shows dates from 27th to 31st. A blue appointment block is highlighted on Thursday, December 28th, from 9:00 AM to 9:30 AM. The appointment details are as follows:

Day	Date	Appointment
Mon	27	
Tue	28	
Wed	29	
Thu	30	
Fri	1	
Mon	4	
Tue	5	
Wed	6	
Thu	7	
Fri	8	
Mon	11	
Tue	12	
Wed	13	
Thu	14	
Fri	15	
Mon	18	
Tue	19	
Wed	20	
Thu	21	
Fri	22	
Mon	25	
Tue	26	
Wed	27	
Thu	28	9:00 AM - 9:30 AM Debtor Consultation Bethany Sutherland +19046555327 bethanyjos@gmail.com Status: Approved Signed up: 1 Capacity: 1
Fri	29	
Mon	1	
Tue	2	
Wed	3	
Thu	4	
Fri	5	

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

The screenshot shows the 'Edit appointment' form with the following fields: Provider (Michael Schumpert (Any)), Service (Debtor Consultation (30 min)), Location (Jacksonville), Date (December 28, 2023), and Period (9:00 AM to 9:30 AM). Under 'Customers (1/1)', there is one customer: BEthany Sutherland (bethanyjos@gmail.com, +19046555327). A yellow circle highlights a dropdown arrow next to the customer name. Below the customer list is an 'Internal note' text area and a 'Send notifications' checkbox. At the bottom right are 'Save' and 'Cancel' buttons.

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

This screenshot is identical to the previous one, but the dropdown arrow next to the customer name now contains an 'X' instead of a checkmark. Below the customer list, there is a search bar with the text '-- Search customers --' and a '+ New customer' button. The 'Save' and 'Cancel' buttons remain at the bottom right.



The appointment status will reflect “Cancelled”

Calendar	Details	My Availability	Notes	File Upload/Download
December 2023				
Mon	Tue	Wed	Thu	Fri
27	28	29	30	1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29
1	2	3	4	5

9:00 AM - 9:30 AM  
Debtor Consultation  
Bethany Sutherland  
+19046555327  
bethanyjos@gmail.com  
Status: Cancelled  
Signed up: 1  
Capacity: 1

If you have any questions, please email John Schumpert, Executive Director, at [info@bankruptcyproseclinicfls.com](mailto:info@bankruptcyproseclinicfls.com)

**LISTING OF “LIFELINE” ATTORNEYS  
FOR HELP DURING COMPLICATED PRO BONO CONSULTS**

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