

**MIDDLE 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 Middle 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, a dark blue header contains 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

Choose Files No file chosen

Upload description (optional):


UPLOAD RESET

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.

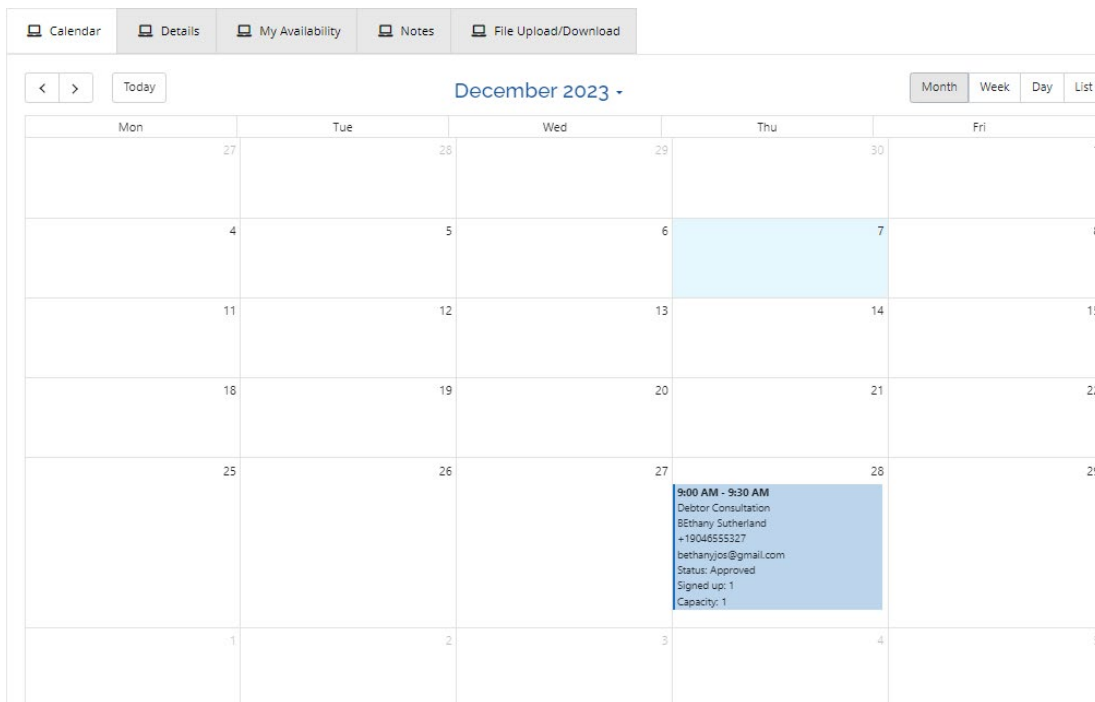
Once you have established your appointment availability, the next step is for a pro se client to schedule an appointment with you.

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.

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:

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)', the customer 'BEthany Sutherland' is listed. A yellow circle highlights a dropdown arrow next to the customer name, which contains a checkmark. Below the customer list is an 'Internal note' field 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 shows the same 'Edit appointment' form, 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 'Internal note' field and 'Send notifications' checkbox remain. The 'Save' and 'Cancel' buttons are still at the bottom right.

The appointment status will reflect “Cancelled”

The screenshot shows 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 these is a header for "December 2023" with navigation arrows and a "Today" button. On the right, there are view options: "Month", "Week", "Day", and "List". The calendar grid shows days from 1 to 31. A blue appointment block is visible on Thursday, December 27th, from 9:00 AM to 9:30 AM. The appointment details are as follows:

Day	Date	Appointment
Thu	27	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 Michael Schumpert, Site Administrator, at info@bankruptcyproseclinic.com

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

Fort Myers

Gregory Champeau

Richard Hollander

Jonathan Tolentino

Jacksonville

Katheryn Hancock

Edward Jackson

Rehan Khawaja

Orlando

Jeffrey Ainsworth

Aldo Bartolone

Frank Wolff

Tampa

Michael Barnett

Jake Blanchard

Kristina Feher

Robert Geller

David Steen

Traci Stevenson

Scott Stichter