

**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

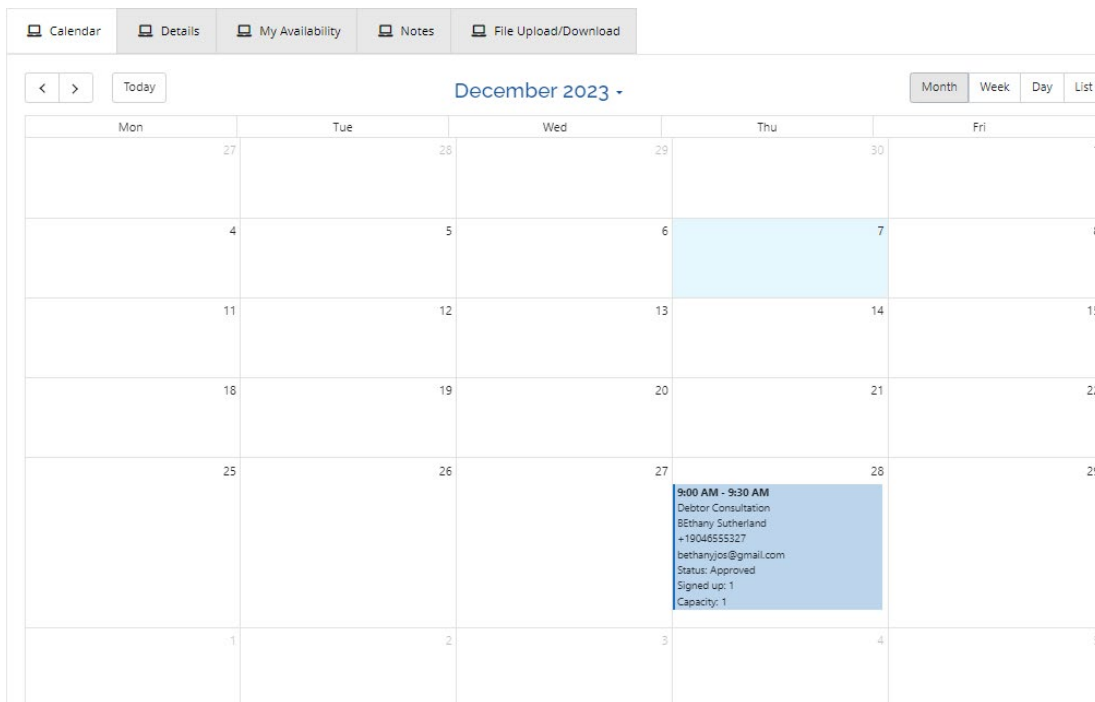
Once you have established your appointment availability, the next step is for a pro se client to schedule an appointment with you.

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 details:

- Provider: Michael Schumpert (Any)
- Service: Debtor Consultation (30 min)
- Location: Jacksonville
- Date: December 28, 2023
- Period: 9:00 AM to 9:30 AM
- Customers (1/1): 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' 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 'Edit appointment' form after the dropdown menu has been updated. The details are the same as in the previous screenshot, but the customer list now shows 'Customers (0/1)'. A search bar with the placeholder '-- Search customers --' and a '+ New customer' button are visible below the customer list. The dropdown arrow next to the customer name now contains an 'X' instead of a checkmark. The 'Save' and 'Cancel' buttons remain at the bottom right.



The appointment status will reflect “Cancelled”

The screenshot shows a web-based calendar for December 2023. The interface includes a navigation bar with tabs for 'Calendar', 'Details', 'My Availability', 'Notes', and 'File Upload/Download'. Below the navigation bar, there are navigation arrows, a 'Today' button, the month/year 'December 2023', and view options for 'Month', 'Week', 'Day', and 'List'. The calendar grid shows days from 27th to 31st. 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 John Schumpert, Executive Director, at [info@bankruptcyproseclinic.com](mailto: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