



The e-Thics of e-Things

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Introduction

The e-Thics of e-Things

- I. What'd I Miss? (R)e-viewing the Florida Rules of Judicial Administration (“FRJA”)
- II. Ten e-Thing Commandments: e-Filing, e-Service, and e-Access
- III. What Comes Next?

What'd I Miss? (R)e-viewing the Florida Rules of Judicial Administration

Confidentiality Requirements

FRJA 2.420: Public Access to and Protection of Judicial Branch Records

- Purposes: facilitate public access to records and protect confidential and sensitive information from disclosure to the public.
- Rule describes and defines confidential information that must be protected.
- Attorneys are responsible for protecting confidential information.
- Notice of Confidential Information within Court Filing found in Appendix to Rule 2.420.

What'd I Miss? (R)e-viewing the Florida Rules of Judicial Administration

IN THE CIRCUIT COURT FOR _____ COUNTY,
FLORIDA

IN RE:

File No.

Division

NOTICE OF CONFIDENTIAL INFORMATION WITHIN COURT FILING

Pursuant to Florida Rules of Judicial Administration 2.420(d)(2), I hereby certify:

I am filing herewith a document containing confidential information as described in Rule 2.420(d)(1)(B) and that:

- (a) The title/type of document is: _____ and
- (b) The confidential information within the document is precisely located at: _____.

Signed on this ____ day of _____, 20__.

Filer's Signature

CERTIFICATE OF SERVICE

I HEREBY CERTIFY that a copy of the foregoing hereof was furnished by _____ to _____ on this ____ day of _____, 20__.

Filer's Signature
Florida Bar Number (if applicable)
Address
Telephone:
E-Mail:

IN THE CIRCUIT COURT FOR _____ COUNTY,
FLORIDA

IN RE:

File No.

Division

NOTICE OF CONFIDENTIAL INFORMATION WITHIN COURT FILING

Pursuant to Florida Rules of Judicial Administration 2.420(d)(2), I hereby certify:

A document was previously filed in this case that contains confidential information as described in Rule 2.420(d)(1)(B), but a Notice of Confidential Information within Court Filing was not filed with the document and the confidential information was not maintained as confidential by the clerk of the court. I hereby notify the clerk that this confidential information is located as follows:

- (a) Title/type of document: [*_____*];
- (b) Date of filing (if known): [*_____*];
- (c) Date of document: [*_____*];
- (d) Docket entry number: [*_____*];
- (e) Precise location of confidential information in document: [*_____*].

Signed on this ____ day of _____, 20__.

Filer's Signature

CERTIFICATE OF SERVICE

I HEREBY CERTIFY that a copy of the foregoing hereof was furnished by _____ to _____ on this ____ day of _____, 20__.

Filer's Signature
Florida Bar Number (if applicable)
Address
Telephone:
E-Mail:

What'd I Miss? (R)e-viewing the Florida Rules of Judicial Administration

Minimization Requirements

FRJA 2.425: Minimization of the Filing of Sensitive Information

- Describes and defines sensitive information and acceptable forms of sensitive information in court filings.
- Attorneys are responsible for minimizing the release of sensitive information.
- For example, only truncated versions of e-mail addresses, initials of a minor's name, the year of a birth date, and the last four digits of a telephone number should be filed.

What'd I Miss? (R)e-viewing the Florida Rules of Judicial Administration

Death Claim Form



The Ohio National Life Insurance Company
Ohio National Life Assurance Corporation

Instructions:

1. Complete this form (please print or type)
2. Obtain a Certified Death Certificate
3. Mail this form and the Certified Death Certificate along with the policy to:

Ohio National Financial Services
Attn: Claims Department
P.O. Box 237
Cincinnati, OH 45201-0237

4. If we need additional information to process the claim, we will contact you.
5. If you have any questions, please call the Claims Department toll-free at 877.446.3010.

Insured's Information:

Full Name of Deceased TERESA ANN SIEVERS Date of Death 06/29/2015

Ohio National Life Policy Number(s) # [REDACTED] 5249, # [REDACTED] 0400

Claimant's Information:

Name MARK D. SIEVERS, TRUSTEE Date of Birth [REDACTED] / 1968

Relationship to Insured SPOUSE

Street Address 27034 JARVIS RD City BONITA SPRINGS State FL Zip Code 34135
(Required)

Mailing address if different than street address _____

Social Security Number [REDACTED] Daytime phone number [REDACTED] - 0173

Email Address MDSIEVERS [REDACTED] Cell phone number [REDACTED] - 0173

Certification

Under penalties of perjury, I certify all of the following:

1. The number shown on this form is my correct identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. a. I am a U.S. citizen or U.S. resident, alien, or
b. A partnership, corporation, company or organization created or organized in the United States or under the laws of the United States, or
c. An estate (other than a foreign estate), or
d. A domestic trust (as defined under Regulations section 301.7701-7), and
4. I am exempt from FATCA reporting.

Signature [REDACTED], TRUSTEE

Date 08/04/2015

Federal law requires that we verify information that identifies all claimants. This information includes address, date of birth and Social Security Number. Also, we may ask to see your driver's license or other identification documents.

What'd I Miss? (R)e-viewing the Florida Rules of Judicial Administration

e-Filing Requirements

FRJA 2.520: Documents

- Recently amended to require that all documents:
 1. be filed in a format capable of being electronically searched;
 2. have one-inch margins on all sides; and
 3. have consecutively numbered pages.

What'd I Miss? (R)e-viewing the Florida Rules of Judicial Administration

e-Filing Requirements

FRJA 2.525: Electronic Filing

- Recently amended to remove the language limiting the document submission size to 25MB.
- The submission size now refers to the “appropriate size” as specified in the Florida Supreme Court Standards for Electronic Access to the Court.
 - ◆ The current maximum document submission size is 50MB.

What'd I Miss? (R)e-viewing the Florida Rules of Judicial Administration

e-Service Requirements

FRJA 2.516: Service of Pleadings and Documents

- Attorneys must serve by e-mail unless an exception applies.
 - ◆ Through the portal or directly by e-mail.
 - ◆ Comply with formatting requirements, if serving directly by e-mail.
- Recent amendment removes the size limitation of 5MB and now refers to the “appropriate size” as specified in the Florida Supreme Court Standards for Electronic Access to the Court.
 - ◆ Currently, the maximum size is 10MB.

Ten e-Thing Commandments: e-Filing, e-Service, and e-Access

1. Determine Confidentiality of Documents

- FRJA 2.420

2. Minimize Filing of Sensitive Information

- FRJA 2.425

3. File the Notice of Confidential Information

- Appendix to FRJA 2.420

Ten e-Thing Commandments: e-Filing, e-Service, and e-Access

IN THE CIRCUIT COURT FOR LEE COUNTY,
FLORIDA
IN RE: ESTATE OF

PROBATE DIVISION

File No. _____

TERESA A. SIEVERS

Probate Division

Deceased.

NOTICE OF CONFIDENTIAL INFORMATION WITHIN COURT FILING

Pursuant to Florida Rules of Judicial Administration 2.420(d)(2), I hereby certify:

I am filing herewith a document containing confidential information as described in Rule 2.420(d)(1)(B) and that the title of the document is Death Certificate and the entire document is confidential.

Signed on this 20th day of April, 2016.

LAIRD A. LILE, ESQ.

Florida Bar Number: 443141

E-Mail: LLile@Lile-Hayes.com

Secondary E-Mail: CPowell@Lile-Hayes.com

M. TRAVIS HAYES, ESQ.

Florida Bar Number: 27883

E-Mail: THayes@Lile-Hayes.com

Secondary E-Mail: service@Lile-Hayes.com

Lile & Hayes, PLLC

Attorneys for Petitioner

3033 Riviera Drive, Suite 104

Naples, FL 34103

Telephone: 239.649.7778

Fax: 239.649.7780

NOTICE OF CLERK'S REVIEW

Pursuant to Rules of Judicial Administration 2.420, the Clerk of Court in and for Lee County hereby gives notice of review of a Notice of Confidential Information within Court Filing for the above referenced case.

It is determined that:

- ☐ The document provided with the Notice of Confidential Information within Court Filing does not meet the criteria of a confidential filing pursuant to subdivision (d)(1)(B) of this rule.
- ☐ The Notice of Confidential Information within Court Filing for the above referenced case does not identify the precise location of the confidential information within the document as required in subdivision (d)(2) of this rule.
- ☒ The social security number is redacted; however, the entire Death Certificate is not confidential pursuant to FLRCivP 2.420(d)(1)(B).

If the document provided did not meet the criteria of a confidential filing pursuant to FLRCivP 2.420(d)(1)(B) the Clerk of Court will maintain the information as confidential for ten days or until the court rules on a Motion to Determine Confidentiality of the information, if one has been filed.

Dated: April 21, 2016

Linda Doggett, Clerk of Court

By: Lily Sangiovanni, D.C.

Ten e-Thing Commandments: e-Filing, e-Service, and e-Access

IN THE CIRCUIT COURT FOR LEE COUNTY,
FLORIDA PROBATE DIVISION
IN RE: ESTATE OF

TERESA A. SIEVERS

Deceased.

File No. _____

Probate Division

NOTICE OF CONFIDENTIAL INFORMATION WITHIN COURT FILING

Pursuant to Florida Rules of Judicial Administration 2.420(d)(2), I hereby certify:

I am filing herewith a document containing confidential information as described in Rule 2.420(d)(1)(B) and that:

(a) The title of the document is Petition for Administration and Appointment of Personal Representative ("Petition"), and

(b) The confidential information within the document is precisely located at (i) Page 1, Line 11 of the Petition itself, and (ii) at Page 1, Lines 6-9 (the minor children's names) of the decedent's Last Will and Testament attached to the Petition.

Signed on this 20th day of April, 2016


LAIRD A. LILE, ESQ.

Florida Bar Number: 443141

E-Mail: LLile@Lile-Hayes.com

Secondary E-Mail: CPowell@Lile-Hayes.com

M. TRAVIS HAYES, ESQ.

Florida Bar Number: 27883

E-Mail: THayes@Lile-Hayes.com

Secondary E-Mail: service@Lile-Hayes.com

Lile & Hayes, PLLC

Attorneys for Petitioner

3033 Riviera Drive, Suite 104

Naples, FL 34103

Telephone: 239.649.7778

Fax: 239.649.7780

NOTICE OF CLERK'S REVIEW

Pursuant to Rules of Judicial Administration 2.420, the Clerk of Court in and for Lee County hereby gives notice of review of a Notice of Confidential Information within Court Filing for the above referenced case.

It is determined that:

☒ The document provided with the Notice of Confidential Information within Court Filing does not meet the criteria of a confidential filing pursuant to subdivision (d)(1)(B) of this rule.

☐ The Notice of Confidential Information within Court Filing for the above referenced case does not identify the precise location of the confidential information within the document as required in subdivision (d)(2) of this rule.

☒ Other: The social security number listed in the Petition is confidential; however, the minor children's name are not confidential pursuant to FLRCivP 2.420(d)(1)(B).

If the document provided did not meet the criteria of a confidential filing pursuant to FLRCivP 2.420(d)(1)(B) the Clerk of Court will maintain the information as confidential for ten days or until the court rules on a Motion to Determine Confidentiality of the information, if one has been filed.

Dated: April 20, 2016

Linda Doggett, Clerk of Court

By: Lily Sangiovanni, D.C.

Ten e-Thing Commandments: e-Filing, e-Service, and e-Access

4. Say No to This: Metadata

■ Use built in features or independent programs to remove metadata.

■ Turning off track changes will not prevent metadata!

1. Open the Word document you want to inspect for hidden data and personal information.
2. Create a copy of the document by clicking "File," then "Save As," and give the document a new name.
* Note that this step is important because it is not always possible to restore the data once you've scrubbed it.
3. Once you've saved a copy of your document, click the "File" tab and then click "Info."
4. Click "Check for Issues."
5. Click "Inspect Document."
6. In the Document Inspector dialog box, there will be boxes to select and/or deselect regarding the types of hidden content that you want to be inspected. Check the boxes for all of the types of hidden content you want to be inspected
* It is recommended that all of the boxes be checked to ensure you've inspected all possible hidden content.
7. Click "Inspect."
8. Review the results of the inspection in the Document Inspector dialog box.
9. Click "Remove All" to remove the metadata.
10. Now the document is clean.
11. Click "Close."
12. Click "File," then "Save As" and convert the document to a PDF.
13. Your document is now ready to be e-filed.

**Ten e-Thing Commandments: e-Filing,
e-Service, and e-Access**

5. Follow the Formatting Rules or You'll Be Back

- Formatting rules: FRJA 2.520.
- For example, e-filed documents must have one-inch margins, consecutive page numbers, and be in a searchable format, such as a Word document.
- You may be asked to resubmit improperly formatted documents.

Ten e-Thing Commandments: e-Filing, e-Service, and e-Access

6. Update e-Service Lists

- As a matter of good practice, keep your addresses up to date.
- It is the filer's responsibility to make sure the Portal uses the names and e-mail addresses provided by the parties.

My Profile

Fields marked with asterisk (*) are required.

[User Details](#) [Change Password](#) [Payment Accounts](#)

User Details

Organization: Rives Law Firm

Role: Attorney - Florida Bar

* User Name: [REDACTED]

* Security Question: [REDACTED]

* Security Answer: [REDACTED]

* First Middle * Last Suffix

Name: Carolyn M Weber []

* Primary Email: cweber1024@outlook.com

Alternate Email1 cweber1024@gmail.com []

/Email2: []

* Address 1/2: 245 North Orange Ave []

* City/State/ Zip Code: Orlando Florida 32750

Phone #: 407-310-3592 Format: ###-###-####

[Update](#)

Ten e-Thing Commandments: e-Filing, e-Service, and e-Access


7. Comply with e-Service Requirements

- e-Service rules: FRJA 2.516.
- For example, emails must have “SERVICE OF COURT DOCUMENTS” and the case number in the subject line.
- Failure to follow these rules can have serious consequences, see *Matte v. Caplan*, 140 So.3d 686, Fla. 4th Dist. Ct. App. 2014.

Ten e-Thing Commandments: e-Filing, e-Service, and e-Access

8. Familiarize Yourself with the Portal

▪ <https://www.myflcourtaccess.com/authority/trainingmanuals.html>

- The Florida Supreme Court Standards for Electronic Access to the Courts  provides guidance and specific technical information about court document filings.
- The portal goes through regular upgrades. For information on changes, go to <https://www.myflcourtaccess.com/authority/portalsoftwareupdates.html>.
- The Florida Courts E-Filing Authority Board of Directors holds regular, public meetings to which anyone can attend. The meeting announcement is found on the [Public Notices](#) page. Meeting materials are found on the [Meetings](#) page.
- Administrative Order [AOSC13-49](#) entered by the Florida Supreme Court authorizing use of e-service through the e-filing portal to comply with the service requirements of [Florida Rule of Judicial Administration 2.516](#).
- E-Filing / Service by E-Mail Exceptions. Exceptions to either service by e-mail or e-filing must be made by a motion to the court in the specific legal matter which the exception is being requested. See [Rules of Judicial Administration 2.525\(d\)\(3\) and 2.516\(b\)](#). [Rules of Judicial Administration](#). 
- E-filing Portal Website  On this site, learn more about the Florida Courts E-Filing Portal governance, read [frequently asked questions \(FAQs\)](#), view [training videos and manuals](#), sign in to the Florida Courts E-Filing Portal.
- Assistance: To request eFiling support, please email support@myflcourtaccess.com or call (850) 577-4609 and leave a message.

Ten e-Thing Commandments: e-Filing, e-Service, and e-Access

9. Utilize the Portal Support Center

The screenshot displays the homepage of The Florida Bar. At the top, the text "THE FLORIDA BAR" is centered above a navigation bar. The navigation bar includes links for "ABOUT THE BAR", "NEWS & EVENTS", "FOR THE PUBLIC", "MEMBER SERVICES", "LOG IN", and "FIND A LAWYER". A search bar is located to the right of the navigation bar. Below the navigation bar, the text "THE FLORIDA BAR / Member Services" is displayed. The main content area features the heading "E-Filing Resources for Florida Lawyers" and a call to action: "Request e-Filing Support for Attorneys & Paralegals by sending an e-mail to support@myflcourtagency.com or by calling 850-577-4609." On the left side, under the heading "On this Page", there is a list of links: "Overview", "Links", "Manuals, Standards and Documentation", "E-Deadlines", and "Education". On the right side, there is a logo for "eFILING RESOURCES" and the text "The Florida Bar" with the website address "www.floridabar.org".

THE FLORIDA BAR

ABOUT THE BAR NEWS & EVENTS FOR THE PUBLIC MEMBER SERVICES LOG IN FIND A LAWYER

Search The Florida Bar

THE FLORIDA BAR / Member Services

The Florida Bar
www.floridabar.org

E-Filing Resources for Florida Lawyers

Request e-Filing Support for Attorneys & Paralegals
by sending an e-mail to support@myflcourtagency.com or by calling 850-577-4609.

On this Page

- Overview
- Links
- Manuals, Standards and Documentation
- E-Deadlines
- Education

eFILING
RESOURCES

Ten e-Thing Commandments: e-Filing, e-Service, and e-Access

10. Stay Up to Date



The Florida Bar Real Property, Probate and Trust Law Section,
the Real Property, Probate and Trust Law PAC &
the RPPTL-PAC present the Section's



Friday, July 29, 2016

The Breakers
One South County Road
Palm Beach, Florida 33480

What Comes Next?

The Upcoming “Reverse e-Filing System”

- The new system will allow access to documents from all counties through one access point.
- All documents from all counties will be in the same format.
- Should be available near the end of 2016!

What Comes Next?

Proposed Orders

- Currently only accepted in some counties but will soon be accepted in all counties.
- Both the county and the judicial officer must accept proposed orders through the Portal, so you may not be able to file a proposed order with a certain Judge even if your county accepts proposed orders.

What Comes Next?

Proposed Orders

Proposed Order
Help

Circuit:
County: Select
Division:

Case #:
Type:
Status:

Case Title:

Case Information
Documents
Service List
Review and Submit

* County
* Division

Select
Select

* Year
* Sequence #
* Court Type
Party Identifier
Branch Location

Search
Clear

* Judicial Officer/Division:

Matter #:

Next
Save to Workbench

Conclusion

