

Support Staff Functionality and the Organization Administrator Role

The Support Staff Functionality allows a legal organization (such as a law firm or government agency) to group and manage their public portal accounts together. The primary purpose of this functionality is to allow an organization's support staff to access their attorney's accounts without multi-factor authentication and to track their work.

After a support staff account has been associated with an attorney's account, the support staff can, while logged into their own account, access the attorney's account to electronically file documents and view cases and documents the attorney has access to (this includes whatever permissions the attorney's account is granted (e.g., OJCIN Online access)). The support staff user will also have access to all portal notifications sent to the attorney's account.

Support staff can be associated with multiple attorneys and attorneys can be associated with other attorneys as support staff within a legal organization.

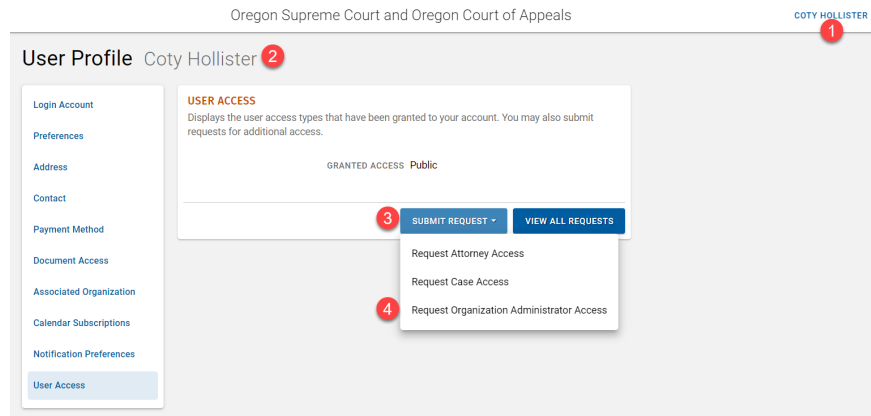
This guide provides the steps to do the following:

- Setup your legal organization within the public portal.
- Add existing attorney and support staff public portal accounts to your legal organization.
- Associate accounts (such as a support staff account to an attorney account).
- How to work on behalf of an attorney.



How to Request Organization Administrator Access

1. Once registered for a public portal account, navigate to **User Profile** by selecting the user name on top-right section of the screen. Click **Profile**.
2. **User Profile** will display. From **User Profile**, select **User Access**, and click **Submit Request** and select **Request Organization Administrator**.



3. This will open the Organization Administrator form which requires the user to provide the following information:
 - a. **Organization** – this field is required.
 - b. **Reference File** – user must upload a copy of photo identification which includes a photo, first and last name. This field is required.
 - c. **Comments** – enter any comments for court administrators to review. This field is not required.
4. Click **Submit Request**. User will receive a confirmation sent to their email.
5. Court administrators review requests daily; user will receive an email allowing or rejecting access. If access has been rejected, a reason will be provided. If the request has not been allowed or rejected within two (2) business days, please call 503-986-5555 to inquire.

The screenshot shows the 'Request Access Organization Administrator' form. It has three main sections: 'ORGANIZATION ADMINISTRATOR' with a dropdown menu for 'Organization *' set to 'Oregon Judicial Department' (marked with a red circle '1'); 'REQUEST INFORMATION' with a file upload field for 'Reference File *' containing 'eFile - Test - ID.docx (11.7 KIB)' (marked with a red circle '2'); and a 'Comments' text area containing 'Test Comment'. A 'SUBMIT REQUEST' button is at the bottom right, marked with a red circle '3'.

How to Manage your Legal Organization

This section provides information for setting up users within an organization. The purpose of this feature is to allow legal organizations to group and manage their public portal accounts, provide access to their attorneys to support staff and other attorneys, and share payment methods.

1. From the main portal webpage, navigate to **Manage Organization**. From here, the administrator will need to add all users in their organization. To add users, click **Users**.

Manage Organization Oregon Judicial Department

Organization Details

ORGANIZATION DETAILS
View the details associated with this organization. Please contact the Court if any of the following details are inaccurate.

NAME Oregon Judicial Department
TYPE Legal Organization
ADDRESS
ADMINISTRATORS Coty Hollister

2. Organization Administrator will be listed with a checkmark under **Administrator**. To add attorneys and support staff to the organization, click **Add User**.

USERS
Manage the details for all users associated with this organization.

<input type="checkbox"/>	Name ▲	User	Attorney	Payment Access	Administrator	Action
<input type="checkbox"/>	Hollister, Coty	coty.m.hollister@ojd.state.or.us			✓	...

0 selected 1 to 1 of 1

ADD SUPPORT STAFF **EDIT USERS** **ADD USER**

3. Enter user email and click **Next**. If user is an attorney, a checkmark will appear under the **Attorney** column. Add all users within your organization (this includes attorneys and their staff such as legal assistants, paralegals, office managers, etc.).

Note: A user must have a public portal account to add them to your organization. This process does not create an account for them.

Non-attorney users cannot be associated with other non-attorney users. Non-attorney and attorney users can be associated with attorney users.

4. To associate support staff with an attorney user, check the box next to attorney name and click **Add Support Staff**.

<input type="checkbox"/>	Name ▲	User	Attorney	Payment Access	Administrator	Action
<input type="checkbox"/>	Hollister, Coty	coty.m.hollister@ojd.state.or.us			✓	...
<input type="checkbox"/>	Hudson, Stephanie	stephanie.hudson@ojd.state.or.us				...
<input checked="" type="checkbox"/>	Parr, Daniel	daniel.parr@ojd.state.or.us	✓			...
<input type="checkbox"/>	Robles, Jeralese	jeralese.m.robles@ojd.state.or.us				...

1 selected 1 to 4 of 4

ADD SUPPORT STAFF EDIT USERS ADD USER

5. Under **Authorized Support Staff**, select all staff who are authorized to work on behalf of the attorney and click **Save**.

Add Support Staff [Close] [Refresh]

ADD AUTHORIZED SUPPORT STAFF
Utilize the field below to add Authorized Support Staff to the selected users.

USER INFORMATION
NUMBER OF SELECTED USERS 1

AUTHORIZED SUPPORT STAFF

Authorized Support Staff *

Select individual(s) who have your authorization to access Public Portal on the behalf of the selected users.

SAVE CANCEL

Note: Attorneys can be added as authorized support staff to other attorneys.

6. To remove a user, the organization administrator may click the three dots under the **Action** column on the **User** screen and select **Remove**.
7. Attorneys may also manage their authorized support staff from their **User Profile**. To do so, click name on top-right section of the portal.
8. Select **Support Staff** from the left-hand menu. From this screen, attorney user may select any user listed to be authorized to work on their behalf. Additionally, all notifications the

attorney receives, may be forwarded to the selected support staff by selecting the **Forward notifications** checkbox.

User Profile Daniel Parr

- Login Account
- Preferences
- Address
- Contact
- Payment Method
- Associated Organization
- Support Staff**
- Calendar Subscriptions
- Notification Preferences
- User Access

SUPPORT STAFF
Your associated Support Staff are displayed below. These Users will have access to your permission within Public Portal. Additional Support Staff can be associated and existing Support Staff can be removed via the field below.

Authorized Support Staff
Hollister, Coty

Select individual(s) who have your authorization to access Public Portal on your behalf.

Forward notifications
Forward all notifications to the Authorized Support Staff listed above.

SAVE

Working On Behalf of an Attorney

Support staff whose accounts have been associate with an attorney account can work on behalf of that attorney. To do this:

1. Click name on top-right section of the portal. Select **On Behalf Of**.

Oregon Supreme Court and Oregon Court of Appeals

User Profile Coty Hollister

- Login Account
- Preferences

LOGIN ACCOUNT
Your login account (which includes your name, email, and password) is managed by another application. You will be redirected to that site to edit these values.

COTY HOLLISTER

- Profile
- On Behalf Of**
- Logout

2. From the **Attorney** dropdown, select the attorney to work on behalf of and then click **Save**.

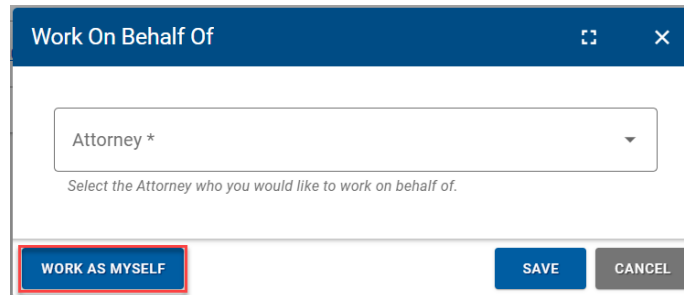
Work On Behalf Of

Attorney *

Select the Attorney who you would like to work on behalf of.

SAVE CANCEL

3. After saving, a green success message will display and the name at the top of the screen will become user’s initials and display attorney name. (Example: C.H as Daniel Parr.)
4. User is now logged into the attorney’s account and will have the same permissions as the attorney, including access to the attorney’s cases, filings, and notifications.
5. To switch back to the original account, click user initials on the top-right section of the screen, click **On Behalf Of**, and select **Work as Myself**.

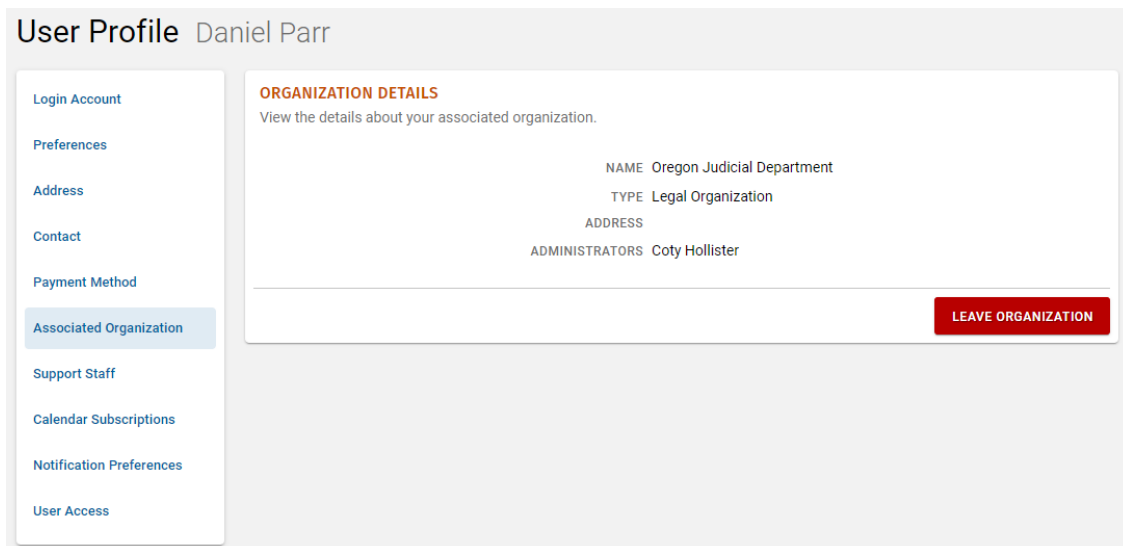


6. User will now resume working in the portal with their own credentials.

How to Leave an Organization

If a user is no longer associated with or works for the legal organization they are associated with in the public portal, the following instructions will guide that user in removing themselves from the legal organization in the public portal.

1. Once logged into the portal, navigate to the name on the top-right section of the screen and click **Profile**.
2. From the left-hand **User Profile** menu, click **Associated Organization**.
3. Under **Organization Details**, click **Leave Organization**.



Frequently Asked Questions and Definitions

Frequently Asked Questions (FAQs)

How do I register for an eFiling account if I am an OJCIN Online subscriber?

From the eFile webpage, click LOGIN / REGISTER. On the Sign In page, click Sign Up Now to begin the registration process. OJCIN Online subscribers must register with the same email they use for their existing OJCIN Online account. Contact OJCIN Online if access has changed.

Will paralegals and other support staff be able to eFile or receive system notices?

Yes. We suggest support staff create their own public account to file. The organization administrator of your legal organization should add all support staff as Users to their organization within the portal.

Who can sign up as an Organization Administrator?

Anyone within your legal organization may sign up as the organization administrator. This role is responsible for managing users within the organization, such as adjusting support staff, adding and removing new staff (attorneys and support staff.)

Can more than one person be an Organization Administrator for a legal organization?

Yes, the system allows for multiple organization administrators.

Can more than one person be listed as an authorized user for an attorney?

Yes. Multiple support staff, including attorneys, can be authorized support staff users.

Can support staff be added to non-attorney users?

No, however, attorneys can support other attorneys.

What if I am not longer associated or work for my legal organization?

Under User Profile, from Associate Organization, click Leave Organization to remove yourself as a member of the organization. The Organization Administrator may also remove your membership from the legal organization.

Definitions

ACMS: The Appellate Case Management System.

Attorney Account: A public portal account that has signed up for the portal and has had their portal account linked to their attorney record in ACMS.

Behalf of an Attorney: The functionality that allows a support staff or attorney to seamlessly “switch” from their account to an associated attorney’s account.

Legal Organization: A law firm, state agency, or other organization that interacts with ACMS and includes both attorneys and their staff.

Public Portal: The single external system of ACMS which includes Appellate eFiling, public access, and OJCIN.

Support Staff Account: The basic public portal account created when someone signs up for the portal. This is also known as a “registered user” and is generally the account used by paralegals and legal secretaries to eFile on behalf of attorneys. NOTE: No additional access or request to the court is needed to create this type of account.