Creating a Financial Administrator Account in eFlex – for Law Firms

In order for the attorneys in your firm to eFile documents that have a fee, such as initiating cases and some secondary filings that require a fee, a Financial Administrator account must be set up with a credit card, then the use of that credit card can be assigned to the attorneys in your firm.

Note: Do not use the Back button in your internet browser; if you want to return to the previous page, use the “Back” button displayed on the web page, or click the “Cancel” button.

To set up a Financial Administrator Account in eFlex, on the eFlex Login Page, click the “Request Account” button (skip to Page 6 to enter/update your credit card information).
Accept the terms of the User Agreement:

Select the User Role of “Financial Administrator”
If you already have an attorney account, your Company Name should appear in the drop-down list on the below page; choose the “Existing” radio button and select your firm name from the list. If your firm name does not appear in the list, click the “New” radio button and enter your Company Name (please also check Existing for Law Office or Law Offices of if your firm uses that designation):

Your Company Name and Filer Role will appear at the top of the next page. Complete the fields on this page. Fields that are required are indicated by an asterisk (*). When you are finished, click “Submit”

Note: If you are asked for a bar number, back out of your selections and select Financial Administrator for the role and NOT attorney. The Financial Administrator role will not require a bar number to be selected.
Usernames cannot be modified. Please consider a generic to the firm username for your Financial Administrator account.

Please make note of your username and password as the email message that is automatically generated when your account is approved may not contain this information. (Note: only the primary email listed receives the confirmation that the account has been created).
You will be directed to the page below. Click “OK” to submit your account request.

The Prothonotary’s Office then receives this request, and when it is approved, you will receive an email to the address provided in the account request, similar to the screen shot below:

You will not be able to enter the credit card information until your account has been approved.
You can then login to eFlex and set up the credit card information for your firm. Once you are logged in, you will see the screen below. Go to Admin – Account Settings.
Then under Wallet Accounts, click “Add”.

At this point you will be redirected to the Heartland Payment Services website.

Click “Create Credit Card Token” (only Visa, MasterCard and Discover are accepted).
Enter the Credit Card Contact Information on this page.

By default, the phone number selects the United States. You can enter the ten digit phone number in the field to the right of where it says US+1 unless you need to select a phone number for a foreign county. If you select the drop down where it displays US+1 it will allow you select another county.

When you are finished, click “Next” to enter your credit card information:
Enter the Credit Card Contact Information on this page.

When you are finished entering your credit card information, click “Next” which brings you to the Verification page.
If all the information is correct, click “Create Token”. You should receive a message of “Token created successfully!”
Click the “Finish” button. This will return you to the eFlex page where you can enter a description (nickname) for this account. This Account Description will be seen on the “check-out” screen for attorneys to select their payment options. Click Submit.
You will be returned to the “Account Settings” page. Once you have created a Wallet Account, you can select which attorneys in your firm should be assigned to access this card. **Click on the “Assign” button** in the “Wallets Accounts” section.

Any attorneys who have eFiling accounts already set up in the system, that share the same Organization as your Financial Administrator account, will appear, as in the screen shot below. (Note: If an attorney you are expecting to see is not listed, please call the Prothonotary to verify the organization is entered correctly).

Check the “Access to Card” checkbox to allow each account to use this credit card. Then click the “Save Changes” button. (Note: the screen offers no indication that your selections have been saved. To verify that the settings have been selected, go to the Home tab and then come back to this screen via Admin<Account Settings<Wallet<Assign to view the checked boxes prior to logging out).
When an attorney e-files something with a fee and uses this account, you will receive an email to the address provided when you set up the credit card account, similar to the email shown below:

![Message with attachment](image)

Attached is the receipt for your payment.

You can further review charges from within this account under Cases>Filing Changes. You are limited to viewing only monthly selections.

For example:

![Filing Charges](image)

**Receipts must be retrieved via the filing attorney’s eFlex account** under eFile>My Filings>(select link under Status of Filed)>Receipt