Proposed Self-Represented Litigant (SRL) Process Recommendations:
Processes must be executable across County Clerk's offices with varied staff and resources. Best practices are noted at the bottom of each section.

Portal Subscriber Registration & Identification Requirements

Current Process	Proposed SRL Process
Registration Requirements: County Clerk specific Portal registration documents and fees received via USPS, or in-person.	Registration Requirements: County Clerk specific SRL Portal registration documents received: via USPS, in-person.
Identification:	Identification: SRL must provide a valid state or federally issued picture identification.
VIA USPS: perform Subscriber identification research via web to verify job title and/or size of organization or firm.	VIA USPS, a copy of the SRL's valid state or federally issued identification. Notarized signatures are required for USPS requests.
In-person: valid picture identification is required.	In-person, valid state or federally issued identification required. Original signatures are required for in-person requests.
Registration Review: documents are reviewed and designated as incomplete or complete.	Registration Review: SRL documents are reviewed and designated as incomplete or complete. Verification: verify if the SRL already has a Portal account, and if: 1. They need a new account created for access to the requested case(s) 2. If they have registered for a portal account in any other County, or 3. If a new account will need created with a separate email address.
Incomplete Registrations: user is notified of missing material(s) via form letter. Documents may either be kept, or returned to requestor.	Incomplete Registrations: SRL is notified of missing material(s) or need for additional email address and login via form letter. Documents may either be kept, or returned to requestor.

Best Practice: SRL registration materials to use plain language and include specified guidance regarding the length of access, how to deactivate and re-activate access if needed. Registration materials must verify if: this is the first time the SRL has requested Portal access; and if the SRL has an existing Party ID.

Best Practice: County Clerks keep a return log of all incomplete requests**.**

Registered User Portal On-Boarding

Current Process	Proposed SRL Process
Inside Courts: log into InsideCourts, Manage User IDs**,** Manage Odyssey-Portal access. Create e-Service request with new registration. Submit request to AOC. AOC requires 48 hours to process requests. AOC Registration: Portal Administrator receives e-Service request, creates user account linking email to proper County and if override is required, adds attorney bar number to system. Once registered, an automated message is sent to registered user confirming registration with instructions to create password. Portal Administrator closes request ticket. County Clerk Administrative: Print AOC confirmation.	Inside Courts: log into InsideCourts, Manage User IDs**,** Manage Odyssey-Portal access. Create e-Service request with new registration, include the SRLs Party ID number, or indicate they have requested Portal access previously, in e-Service request notes. Submit request to AOC. AOC requires 48 hours to process requests. AOC Registration: Portal Administrator receives e-Service request and creates SRL user account linking email to proper County and Party ID to system. Portal Administrator will contact Clerk if user exists in Portal. Once registered, an automated message is sent to registered user confirming registration with instructions to create password. Portal Administrator closes request ticket. County Clerk Administrative: Print AOC confirmation.

Best Practice: County Clerk notifies subscriber via form email that their request is in process and gives subscriber an overview of next steps and timelines.

Best Practice: County Clerk updates registration request and marks off when the request has been sent to AOC.

Registered User Individual Tracking & Coordination with AOC

Current Process	Proposed SRL Process
Tracking: County Clerk keep all Portal requests, approved and denied, on file. County Clerk opens Portal user file for each registered organization/ subscriber. A complete record of the Subscriber's access is noted in the file.	Tracking County Clerk keep all Portal requests, approved and denied, on file. County Clerk opens Portal user file for SRL. A complete record of the Subscriber's access is noted in the file, including any associated Party IDs.

Best Practice: County Clerk adds user to tracking sheet.

Processes for adding and removing assigned attorneys (Attorney of Record) to a case.

Current Process	Proposed SRL Process
Follows the same process as a Notice of Appearance or Filing a Case County Clerks link and un-link attorneys via bar number in the CMS as requested. If there are issues with linking cases, County Clerk will contact AOC.	Follows the same process as a Notice of Appearance or Filing a Case County Clerk will need to ensure processes are in place so an SRL's specific Party ID is used on all of the SRL's cases in Odyssey Case Manager. County Clerk link and un-link SRLs Party ID in the CMS as requested. If there are issues with linking cases, County Clerk will contact AOC.

Registered User Portal Removal

Current Process	Proposed SRL Process
User Notification: County Clerk sends an email to subscriber stating access is ending with instructions to continue subscription. If the required fees are not received by the email date, the subscription deactivation. Access Removal County Clerk Logs into eService, submits e-Service Request to deactivate access. AOC receives e-Service Request or email from County Clerk indicating deactivation. Portal Administrator deactivates user in system and notifies County Clerk. Close User File: County Clerk Updates internal files with cancellation verification. Deactivation confirmations are filed with the rest of a subscribers Portal Registration documents once they are processed and noted on tracking spreadsheet.	Same Process

Best Practice: County Clerks may choose to provide a ‘grace period’ before closing the account

Best Practice: County Clerk keeps track of whether accounts are closed at the request of the subscriber and those closed due to non-payment. Instruction to SRL re how to access information once account is deactivated, including any associated Party IDs.