

FREQUENTLY ASKED QUESTIONS FOR PROBATE SMART FORMS

1. Do I download a program to use the Smart Forms?

No. The Smart Forms are web based forms and do not require a program to be downloaded. They may be used as long as you have a connection to the Internet.

2. I'm filling out the form, but the information isn't populating in the fields . . . And I can't save the form???

Please check to see if you are using the correct browser. The system requirements are listed on the Smart Form home page.

3. What are web based Smart Forms? Why can't I print a blank and eFile it?

Once you fill in the blanks on the web form, there are two options: (1) "Save Draft" or (2) "Create PDF." You must complete all steps outlined on the [Smart Form webpage](#). The "Save Draft" function will allow you to save a document whilst in the process of adding the information. An ".html" file will be saved on your computer and this will be the only way the information can be retrieved. Once the form is completed and ready for submission, use the "Create PDF" button. The PDF document is what is filed through the [Florida Courts eFiling Portal](#). Please do not attempt to print and file the web form. It will be rejected by the Clerk.

4. How do I enter the case number?

Enter YNNNNNNNN (for example, if your case number is PRC12012, enter: 120000012 – the two digit year followed by five zero's followed by the two digit case number). Make sure that are no spaces or dashes before or after the digits.

5. What is "Save Draft"?

"Save Draft" creates a .html file that is saved on your computer. There should be a pop-up on the lower left hand of the screen which prompts you to save the file after you press "Save Draft." However, be aware that some users have the settings in the browser to allow the file to be saved automatically to a folder on the computer. Please check your browser settings or look in the downloads folder of the computer.

6. What is "Create PDF"?

Please use "Create PDF" when you have completed the form and you are ready to print your final draft. This is what you will use for your submission to the Clerk of Court.

7. I'm working on the accounting Smart Form, but I keep getting an error message. What's wrong?

If you are receiving the error message: "Line 8 should equal 14" or "Total Assets/Liabilities at Close of Accounting Period: missing or incorrect value", please try the following:

- *Make sure that the dollar amounts entered are rounded to the nearest dollar;*
- *Enter accurate amounts in section(s) 6 and/or 9 of the accounting form.*
- *If you continue to receive the error message, delete the information in the box and re-enter. Make sure to re-enter the information with no additional blank spaces.*

8. I was working on a Smart Form, but now I can't access the page. What do I do?

A good working habit with the Smart Forms is to use the "Save Draft" function frequently. Using the Smart Form allows a user to save his/her most recent work in an .html file stored on the user's computer. If an error occurs or there is a problem with the program, you can always return to the most recent version of the document and continue your work from there. Please note that the file can only be accessed from this .html file. If lost, the Court cannot recover the file.

9. I'm filling these forms out for my accountant/attorney/client, how do I send this form to them to make changes or add information?

Use the "Save Draft" feature to save .html file stored on your local drive (usually the downloads folder on your computer, unless you save it elsewhere). This .html file can be attached to an email. The recipient will be able to open the in-progress form and make changes. Keep in mind that they will need to use the "Save Draft" feature to save a new version of the .html file once they have finished making their changes. This draft will have the most current information and may need to be shared with the party that will be finalizing the document prior to submission.

10. I made a mistake on the form and I didn't realize it until I printed the PDF. How can I fix it?

Please make a habit of using the "Save Draft" feature to save the final draft of your web form before creating the PDF. If you notice an error on the PDF, open the final draft of the web form and correct the error. Save it again and then create a new PDF with the changes. Do not make an inline notation in pen on the form. Making a notation or change on the form in pen/pencil will cause the form to be rejected.

11. I'm trying to access the forms but keep getting an error message. What's going on?

If you have an issue accessing the forms, send an email to guardian@17th.flcourts.org and we will look into it. Please keep in mind that a response may only be possible during court business hours.

12. How does my client sign the form?

You have two options:

- Leave the signature field blank on the web form, create the PDF, have the client sign it, scan it and upload that file to the portal. Please be aware that, when scanning the document as an image, the document may no longer comply with Rules of Judicial Administration 2.525 and 2.526. For more information on accessibility rules, please visit the [Florida Supreme Court homepage](#).
- Alternatively, you can leave the signature field blank on the web form and create the PDF. Next, have the client sign the form (keep this signed paper copy for your records). Now that you have a signed copy, return to your final saved version of the web form, enter '/s/ client name' on the signature line (along with the date signed) and then create a new PDF. Save the electronically "signed" version on your computer and upload that file to the [Florida Courts eFiling Portal](#).

13. My annual plan requires a physician's form. How do I get the form?

Once you complete all steps and create and print the PDF, the physician's form will print as page 11 along with the rest of the form. There is no need for concern if changes need to be made on the annual plan after printing and the physician's form has a different date.

14. I have more entries than are accepted on the form. What do I do now?

While the Court has worked to add additional entry fields, the number needed cannot be anticipated. Therefore, in the last entry available on the form, place the aggregate total (sum of the remaining entries). Indicate "aggregate total" in the description field. Itemize these entries on an additional page and include that supplemental page with your filing.

15. I cannot access any of the Smart Forms when I click the links. How do I correct this?

Check to ensure that you are connected to the internet. If you are on a network and/or behind a firewall, you may need to check with your IT Department to ensure that Port 81 is open. If you still cannot access the Smart Forms, please email guardian@17th.flcourts.org.

16. I hit “Create PDF” and now my document disappeared?!?!?

Once you press “Create PDF”, a download link should appear. Once that document is downloaded, you will have the PDF. However, be aware that some users have the settings in the browser to allow the file to be saved automatically to a folder on the computer. Please check your browser settings or look in the downloads folder of the computer.

17. I’m completing a checklist for a guardianship, but the form requires a case number and I don’t have one . . .

Enter YNNNNNNNN (that’s 7 N’s).

18. How do I enter a phone number?

The correct formats are: (XXX) XXX XXXX or (XXX) XXXXXXXX.

19. My PDF is complete. What do I do now?

To submit your filing, please visit the [Florida Courts eFiling Portal](#). For any issues with eFiling through the Portal, please email support@myflcourtaccess.com or call (850) 577-4609.

20. How do I merge forms?

Please review this [tutorial](#).

21. I submitted my Smart Form, but I received an email rejecting my filing. What do I do now?

If your eFiling has been rejected, you can:

- Correct the mistake and resubmit through the [Florida Courts eFiling Portal](#); or
- Contact the Clerk’s office for more information. Please email efiling@browardclerk.org. Indicate in the subject line that this is a Probate Division issue and include the Florida Courts ePortal reference number.

Also, check the [Clerk’s website](#) for answer to common questions.

22. I can’t find the saved draft on my local drive. Can the Court access it and send me a copy?

The only way to retrieve the information is through the saved draft. The Court cannot retrieve the draft without this information.

23. I’m having a problem with the form. Can you take a look for me?

The only way to review the form is to send a copy of the Saved Draft to guardian@17th.flcourts.org. This allows us to take a look at what issue there may be on the form, as may be difficult to understand the issue over the phone.

Still have questions?

Please send an email to guardian@17th.flcourts.org.

If you have received a rejection email after filing, please email efiling@browardclerk.org. Indicate in the subject line that this is a Probate Division issue and include the Florida Court ePortal reference number. Or, check the [Clerk's website](#) for answer to common questions.