



# Through the Looking Glass: A Guide to Your Online Client Portal

**Everything you need to know about your case: Communicate, share, access, and collaborate with your attorney in one easy-to-use online portal!**

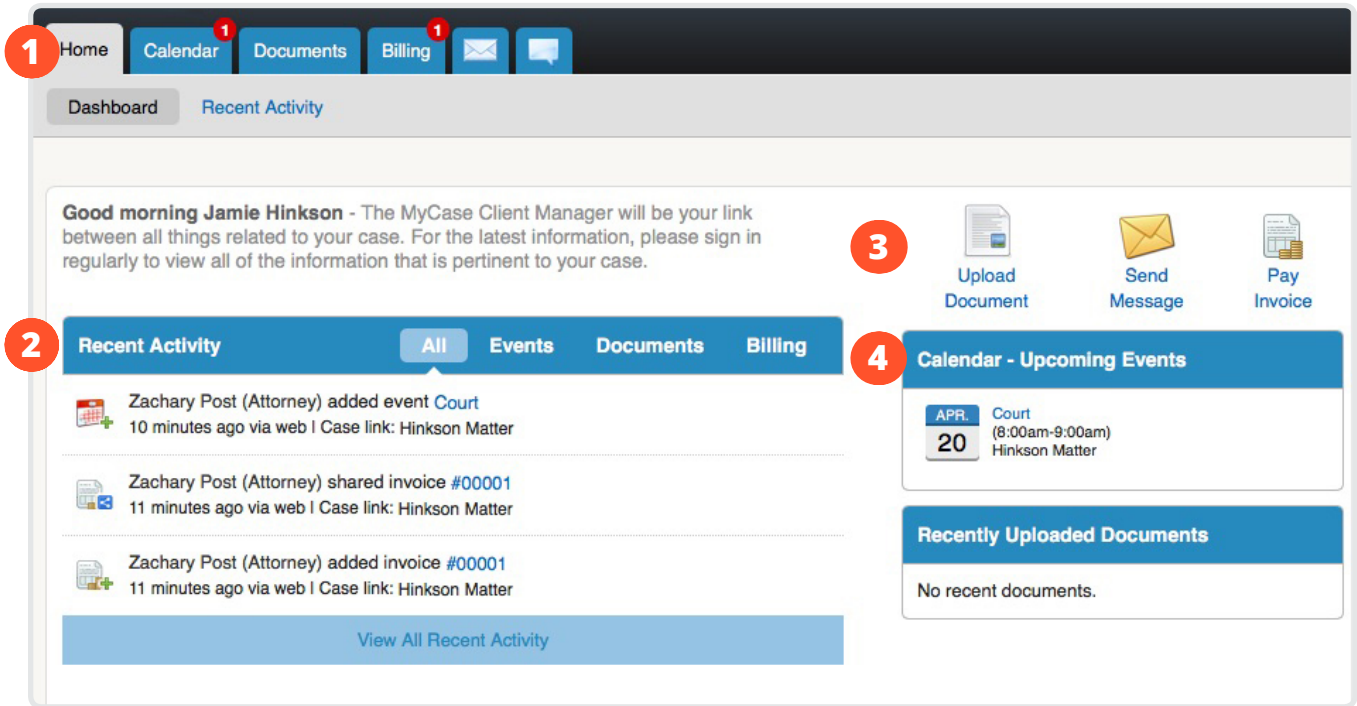
We love our clients, and we're committed to being there for you 24/7. That's one of the reasons why we use MyCase and give you access to our online portal to keep you constantly up-to-date and share critical case information with you. With your own personal login, you can send us secure messages, comment on case items, share documents

We encourage you to use this account to communicate with us – you'll find it useful to have all your pertinent case information in one centralized place rather than scattered through email, phone and mail communication. If you haven't already, you'll soon receive an email with a link to set up your online portal account.

In this guide, we'll show you everything you can do in the online client portal – as well as give you step-by-step directions. If you need any help, please contact us any time.

# Home Screen

Once you've setup your account, you'll log in and see this home screen:



- 1 Menu Tabs:** Use these tabs for easy access to the home screen, case calendar, documents, invoices, mail, and comments. The red bubbles over those tabs in the example above are 'notifications' that there are new items for you to check out.
- 2 Recent Activity:** "The Recent Activity" stream shows you recent communications and case activity updates.
- 3 What You Can Do:** You can take three main actions, shown here. When you want to upload a document, send a message, or pay your invoice, do so from these icons.
- 4 What's Coming Up:** Check out upcoming events deadlines and what documents we've recently shared with you.

# Uploading Documents

The screenshot shows a web form titled "Add Document" with a close button in the top right corner. The form contains four main sections, each with a red circular callout number on the left:

- 1 Case Link:** A dropdown menu with "Hinkson Matter" selected.
- 2 Doc. Name:** A text input field.
- 3 Source:** A dashed box containing the text "Drag your file here or [click to browse](#)."
- 4 Description:** A text input field.

Below the description field, there is a note: "This description will be viewable by anyone this document is shared with." At the bottom right of the form is a blue button labeled "Upload New Document".

- 1 Case Link:** This dropdown menu contains all of the cases you've been linked to – choose which case this document relates to.
- 2 Document Name:** Self-explanatory :)
- 3 Source:** Either drag and drop the document or 'click to browse' to select the document from your computer files (e.g. your desktop, documents folder, etc).
- 4 Description:** Describe the document – it helps when we're notified of what you've uploaded!

# Sending Messages

The screenshot shows a 'New Message' form with the following fields and elements:

- 1** **Case Link:** A dropdown menu with 'Hinkson Matter' selected.
- 2** **Send To:** Two checkboxes are checked: 'Zachary Post (Attorney)' and 'Paul Smith (Attorney)'.
- 3** **Subject:** The text 'New Case Update' is entered.
- 4** **Message:** A rich text editor with a toolbar (bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink) and the text 'Hi guys, I have a few updates that I need to share with you in regards to my case, here are the details:'.

At the bottom, there are buttons for 'Discard draft', 'Saved', and 'Send Message'.

- 1 Case Link:** You'll be given a dropdown menu of cases you're linked to – choose the one that relates to the message you're sending.
- 2 Send to:** This will populate with everyone at our firm who's working on your case. Choose which people you'd like to share the message with.
- 3 + 4 Subject and Message:** Just like an email (but way more secure)!

We hope you find your online portal is easy-to-use and simplifies the process of your case. Let us know if you have any questions.