S mycase

All Cases

View all events

Zac Post shared invoice #00163

Zac Post shared invoice #00157

Sep 25, 2017 2:58 PM

Sep 12, 2017 3:29 PM

What's New

9

1 new message

7 new documents

Upcoming Events

2 unpaid invoices

Meeting to discuss case Oct 3, 10:00AM - 11:00AM

Court Appearance

Oct 26, All day

Recent Activity

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A Guide to Your Client Portal

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

The MyCase Client Portal gives you access to critical case information at any time during your case. With your own personal login, you can send us secure messages, comment on case items, share documents with us, access your invoices, and easily make payments. All your important case information is centralized.

In this guide, you'll find step-by-step instructions for everything you can do in the MyCase Client Portal.



Home Screen

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







Uploading Documents B B HOME INBOX DOCUMENTS EVENTS BILLING Documents for: Miller Last Will and Testament Miller - Welcome Letter.pdf Ð Miller - Welcome Letter.pdf Miller Trust - DRAFT.docx Aller Trust - DRAFT.docx Phil_Miller_Assets.docx Phil_Miller_Assets.docx



CANCEL

Document Details	× Document Detail
Document Name	Document Name Description Choose File No file choose
2 Description	ADD DOCUMENT
Choose File No file chosen	
ADD DOCUMENT CANCEL	

To upload a document, simply click the + sign in the Documents tab.



Document Name: The name you'd like to appear in MyCase for this document



Send to: This field populates with everyone at our Description: Describe the document – it helps to know what



Source: Click "Choose File" to select the document from your devices files (e.g. your desktop, documents



Sending Messages

HOME	INBOX DOCUMENTS EVENTS BILLING	SETTING	SS LOG OUT
	Inbox	Sent	
			All Cases 🔻
	Your Case		
2	Zac Post		
	Hi Phil - could you give me a call when you get a moment?		
	About your case		
	Zac Post		
1	Thank you for your time and attention with this matter.		
	Your Property		
	Zac Post		
1	Thank you for your message!		
	Next meeting		
	Zac Post		
1	Thank you!		







To send a message, simply click on the + sign in the Inbox tab.



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. **Note:** If you only have a single case, this dropdown does not appear.



Send to: This field populates with everyone at your firm who is working on your case. Choose which people you'd like to share the message with.



(and 4) Subject and Message: Just like an email (but way more secure)!



Paying an Invoice

Unpaid Involces & Funds Requests	TTINGS LOG OUT	
Aug 29, 2027 - #8-00103 S \$1,000.00 Jun 30, 2027 - Im: #00764 Billing History	All Cases 👻	
Jun 30, 2007 - Hru 40064 Billing History	OVERDUE PAY NOW	
	DUE IN 8 DAYS PAY NOW	ļ
\$2,027.95		
Jun 22, 2017 - Inv. #00167	PAID SEP 12, 2017	



HOME INBOX DOCUMENTS EVENTS BILLING		SETTINGS LOG OUT
nvoice #00068		EXPORT PDF
	Amount Due	
	\$1,000.00	
nvoice Date		Sep 12, 2017
Due Date		
Payment Terms		
Case		First Case
lat Fees		
Flat Fee for accepting this case Sep 12, 2017		\$1,000.00

Clicking on **Pay Now** takes you to a form where you can input your payment information, and make a payment on an invoice





1

2

Invoice List: Clicking on an individual invoice will takes into the detail view, and allows you to view the contents of the invoice.

Pay Now: Selecting this button will takes directly to a payment screen, where you'll be able to enter your payment information and pay your invoice online. It's easy to pay via credit card or eCheck. To make an eCheck payment all you need is your bank account and routing number, which you can find online or on your checks - and there are no fees.

