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 with us, as well as access your invoices and easily make payments.

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

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**

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

**Paying an Invoice**

When we share an invoice with you, MyCase will automatically send you an email that it’s been uploaded and shared. To view or pay it, go to the Billing tab on the home screen and follow the directions. 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.

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**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.**