

CLIENT PORTAL GUIDE

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

Logging In

After you receive your new account link from MyCase and create your personal password, you can access the portal at <u>https://emw-law.mycase.com/</u> If you ever forget your password, just go to the Client Login Page, click '**Forgot Password'** and follow the prompts.

Mobile App

MyCase has a mobile app for your iPad, iPhone, or Android device.

Set Your Log Out Preferences

Automatically logging out inactive viewers is a security feature of MyCase. Set your log out preferences for the amount of time most convenient for you, as shown below:

HOME INBOX DOCUMENTS EVENTS BILLING	I SETTINGS LOG OUT
My Profile	2. My Preferences
Time Zone	
(GMT-08:00) Pacific Time (US & Canada)	T
Automatic Logout Image: Automatically log me out after a period of inactivity Log me out after 3. 10 minutes of inactivity 10 minutes of inactivity 30 minutes of inactivity 60 minutes of inactivity	۲
Access Old Client Portal	
Clicking the button below will redirect you to the previous version of the client portal.	
ACCESS OLD 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 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	SETTINGS	LOG OUT
	Inbox	Sent	
			All Cases 🔻
2	Your Case		
	Zac Post		
	Hi Phil - could you give me a call when you get a moment?		
	About your case		
	Zac Post		
	Thank you for your time and attention with this matter.		
	Your Property		
	Zac Post		
-	Thank you for your message!		
9	Next meeting		
	Zac Post		
	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

	HOME INBOX DOCUMENTS EVENTS BILLING	SETTINGS	LOG OUT	
	Unpaid Involces & Funds Requests		All Cases 👻	
	\$500.00 Aug 28, 2070 - #R-00103		OVERDUE PAY NOW	r
	\$1,000,00 Jun 30, 2017 - Imix #00164		DUE IN 8 DAYS PAY NOW	ŀ
	Billing History			
	\$2,027.95 Jun 22, 2017 - Imi, #00157		PAID SEP 12, 2017	
_				



SETTINGS LOG OUT
EXPORT PDF
Amount Due
1,000.00
Sep 12, 2017
First Case
\$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







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.

