

# MyCase Client Portal

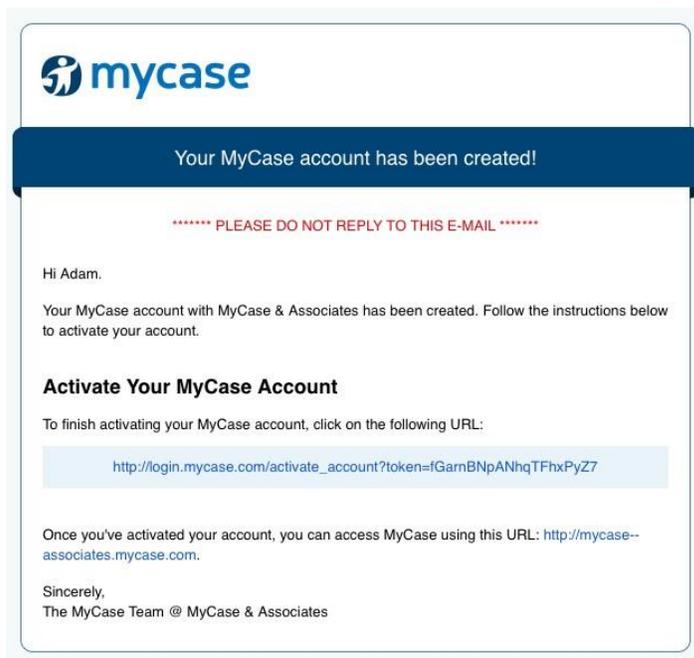
The MyCase Client Portal is an easy-to-use, online platform that provides you with 24/7 access to important case information and secure communications with the your attorney.

Privately and securely collaborate with your attorney:

- Exchange confidential messages
- View important case events and deadlines
- Upload and access case documents
- Comment on items shared with you

## Activating Your MyCase Client Portal

Once your attorney has given you MyCase Client Portal Access, you will receive an Activation Email (pictured below). Click on the URL in the email to activate your Client Portal account.



Once you have activated your account, you can access your Client Portal any time by navigating to [www.mycase.com/login](http://www.mycase.com/login).

*Note: Activation Emails will be sent from [no-reply@mycase.com](mailto:no-reply@mycase.com). If your attorney has sent you an activation email and you cannot locate it in your inbox, please be sure to check your Spam filter.*

## Navigating Your MyCase Client Portal

The screen shot below shows the MyCase Client Portal Home Screen. This is what you will first see each time you log into your Client Portal.

The screenshot shows the MyCase Client Portal Home Screen. At the top, there is a navigation bar with the MyCase logo on the left and a user profile for Adam Jones on the right. Below the navigation bar, there are six tabs: Home, Calendar, Documents, Billing, Messages, and Comments. The Calendar, Billing, and Messages tabs have red notification bubbles. A green '1' is placed above the Messages tab. Below the navigation bar, there is a sub-navigation bar with 'Dashboard' and 'Recent Activity' tabs. The main content area is divided into several sections. On the left, there is a 'Recent Activity' stream with a blue header and a green '2' above it. The stream lists four activities: 'shared Invoice #20150038', 'added Invoice #20150038', 'added appointment Initial Strategy Meeting', and 'uploaded a new document Employment History'. On the right, there are three action buttons: 'Upload Document' (green '3'), 'Send Message' (green '3'), and 'Pay Invoice' (green '4'). Below these buttons is a 'Calendar - Upcoming Events' section with a blue header and a green '5' above it, showing an event for July 30: 'Initial Strategy Meeting (11:30am-12:30pm) Jones Matter'. Below the calendar is a 'Recently Uploaded Documents' section with a blue header and a green '5' above it, showing two documents: 'Employment History' and 'Client Welcome Letter'.

1. Navigation Tabs & Notification Bubbles – There are 6 Navigational Tabs in the Client Portal: Home, Calendar, Documents, Billing, Messages, and Comments. In the screen shot above, notice the red bubbles over the Calendar, Billing, and Messaging tab. This lets you know that you have a new item waiting for you. Any time a new item is shared with you, a red notification bubble will appear in your portal.
2. Recent Activity – The Recent Activity stream lists updates related to your case (i.e. items added to your Client Portal, changes made to items already shared with you, and communications sent to you).
3. Upload Document, Send Message & Pay Invoice – These are the main actions that you can perform in the Client Portal. Upload Documents lets you choose a file from your hard drive and upload it into the Client Portal. Send Messages lets you write a new message and send it to the firm. Finally, if enabled, you may also have the option to pay your invoices through the Client Portal.
4. Pay Invoice – If an unpaid invoice has been posted to your Client Portal, you can access and pay the invoice by selecting the “Pay Invoice” option.  
*Note: Not all Client Portals are enabled with online payments.*
5. Calendar & Recently Uploaded Documents – The calendar box will show you upcoming events and deadlines. The documents box will show you the most recently uploaded documents that have been shared with you.

## Uploading Documents

Instead of using email or traditional mail to send documents, you can upload documents right into the Client Portal. This way, your attorney can have instant, secure access to the necessary documents they need to work on your case.

To do so, click on the “Upload Document” button in your Client Portal. You will be taken to the Add Document Window (pictured below):

The screenshot shows a window titled "Add Document" with a close button in the top right corner. The window contains the following fields and elements:

- 1 Case Link:** A dropdown menu with "Jones 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 window is a blue button labeled "Upload New Document".

1. Case Link – This is a drop-down menu that contains all the cases/matters that you have been linked to. Choose the case that you are uploading the document for.  
*Note: If you are not linked to multiple cases, the “Case Link” option will not be present.*
2. Doc. Name – Provide the name of the document that you will be uploading to the Client Portal.
3. Source – Here is where you can choose the file you would like to upload into MyCase from your computer. You can drag the file from your computer to the Source Box or select “click to browse” to browse your computer’s files.
4. Description – Provide any details or notes you would like to share with your attorney.

## Sending Secure Messages

Instead of sending an email or calling your attorney's office, you can send secure messages from the Client Portal.

To do so, click on the "Send Message" button and you will be taken to the New Message Window (pictured below):

The screenshot shows a "New Message" window with the following elements:

- Case Link:** A drop-down menu (labeled 1).
- Send To:** A section with the instruction "Please select a case" and a list of names with checkboxes (labeled 2).
- Subject:** A text input field (labeled 3).
- Message Body:** A rich text editor with a toolbar (bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, insert image, insert video) and a large text area with the placeholder "Type your message here..." (labeled 4).
- Buttons:** "Cancel" and "Send Message" buttons at the bottom right.

1. Case Link – This is a drop-down menu that contains each of the cases/matters that you have been linked to. Choose the case that your message is regarding.
2. Send To – Once you select the Case Link, you will see the attorney(s) and staff working on your case. Check the box next to the people you would like to send the message to.
3. Subject – Enter the subject for the message here.
4. Message – Enter the message/body that you would like to send.