# CLIENT PORTAL OVERVIEW

Logging In

After you receive your new account link from MyCase and create your personal password, you can access the portal from PETRUSHA LAW's website at www.petrushalaw.com. In addition, MyCase has a downloadable app for your iPad, iPhone, or Android device. If you ever forget your password, just go to the Client Login on our website, click **Forgot Password** and follow the prompts.

Setting Your Preferences

You may update your contact information, set notification preferences (there are email and/or text options), change your email and password, upload a profile picture, or customize an automatic logout timer from your profile preferences page. Just click the drop down arrow next to your name on the upper right side of any portal screen and choose "Settings."

Client Dashboard

The screen shot below shows the Client Dashboard. It's what you will first see when you login to your MyCase account. Let's take a look at the elements of this page.
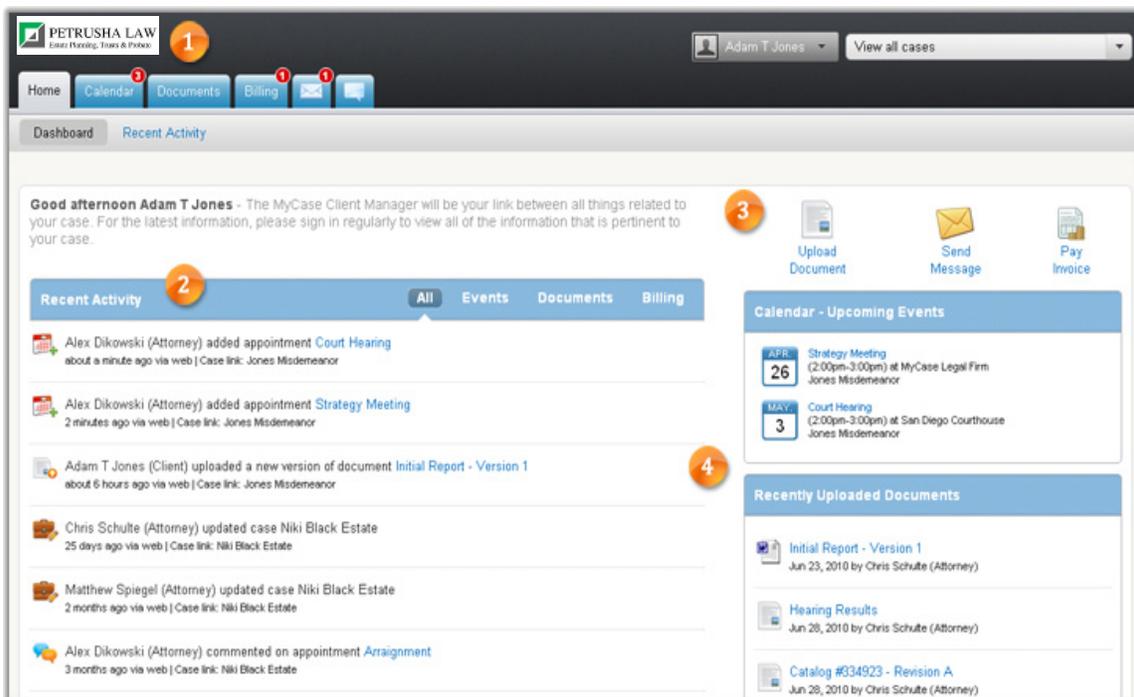
1   **Navigation Tabs & Notification Bubbles -** You have access to 6 sections: **Home**, **Calendar**, **Documents**, **Billing**, **Messages**, and **Comments**. In the screen shot above, notice the red bubbles over the Calendar, Billing, and Messaging tab. This lets you know there are new calendar events, billing statements, and messages waiting.

2   **Recent Activity –** These are updates and recent activity related to your case. Please note you will only see activity for items that have been shared with you. We won't inundate you with all of our activity on your project; only those matters which we've identified for your review and participation.

3 **Upload Document, Send Message & Pay Invoice -** These are the main actions you can perform in MyCase. **Upload Documents** lets you choose a file from your computer and upload it into the client portal. We will automatically be notified when you upload a new document. **Send Messages** lets you write a new message and send it to the firm. You can also pay your invoice through the client portal using a credit or debit card.

4 **Calendar & Recently Uploaded Documents -** The calendar box will show you what upcoming events and deadlines are coming up. The documents box will show you the most recently uploaded documents that have been shared.

Uploading Documents

You no longer need to use email or traditional mail to send requested documents. You can upload them right into the client portal. When you upload a document, all firm users associated with your case will be notified. When you click the **Upload Document** button, you will be taken to the Add Document Window (pictured below).
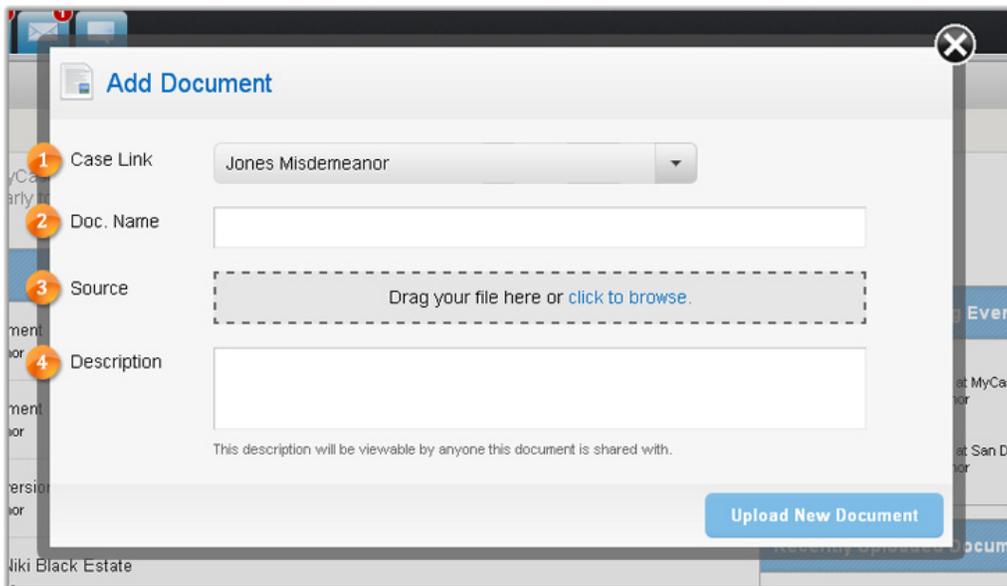
1 **Case Link -** You may be given a dropdown menu that contains all cases you have been linked to. Choose which case you are uploading the document for.

2 **Doc Name –** Here you will type in the name of the document you are about to upload. You may choose any name you'd like.

3 **Source –** In this area you can either browse for or "drag and drop" the file you'd like to upload into the client portal.

4 **Description –** Here you can add any details or notes that you'd like to include with the document.

Sending Secure Messages

More Secure Than Email. Communication between attorney and client must be kept confidential, and having confidential conversations through email poses serious risk. A major benefit of this Messaging is that all communications are kept within the secure framework of MyCase. Messages cannot be forwarded to parties outside of MyCase and in the event someone's email address gets hacked, sensitive information will not be exposed. If you wish, your accountant and other professional advisors may corroborate on your project in MyCase as well.

Messaging Overview

Instead of emailing or calling, you can send secure messages to us which are delivered immediately. When you click the **Send Message** button, you'll be taken to the New Message window (below).

![1] **Case Link -** You may be given a dropdown menu that contains all cases you have been linked to. If so, choose which case the message should be associated with.

![2] **Send To –** When you select your case from the **Case Link** dropdown, the **Send To** field will populate with everyone linked to that case. In the example above, the firm users Alex, Chris, Matthew, and Mike were all linked to the chosen case, which is why they appear. Check the box next to the people you'd like to send the message to.

![3] **Subject -** You can enter a subject for the message.

![4] **Message –** Here you can enter the body of the message that you would like to send.

Commenting Overview

The commenting feature allows you to comment back and forth on various items in the system such as uploaded documents, calendar events, etc. Comments are always directly linked to an item, and can be viewed and responded to from the details page of the individual item as shown below.

What is the Comment Inbox? The Comment Inbox is a tab in MyCase where all of your comments are delivered, regardless of which items they are linked to. Think of it like an email inbox. When you get a new comment, it is placed at the top of your Comment Inbox.