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# CLIENT PORTAL GUIDE

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# Logging In

The first thing you will receive is a welcome email from MyCase requesting for you to create an account, there will be a link provided prompting you to add your personal password. Once your account is created, you can access the portal at anytime from the MyCase website at [www.mycase.com](http://www.mycase.com) OR through Widlast Legal's website at [www.widlastlegal.com](http://www.widlastlegal.com) using the "Client Portal" button located in the upper left hand corner of the home page. If you forget your password, click "Forgot Password" on the MyCase login screen and follow the prompts. Your username will be your email address associated with your case.

# Mobile App

If you will be logging in from a smart phone or tablet, MyCase has a mobile app for your iPad, iPhone, or Android device. Downloading the MyCase app is recommended for ease of use.

# 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 **WIDLAST LEGAL** **SETTINGS** LOG OUT

My Profile **2. My Preferences**

Time Zone  
(GMT-08:00) Pacific Time (US & Canada)

Automatic Logout  
 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

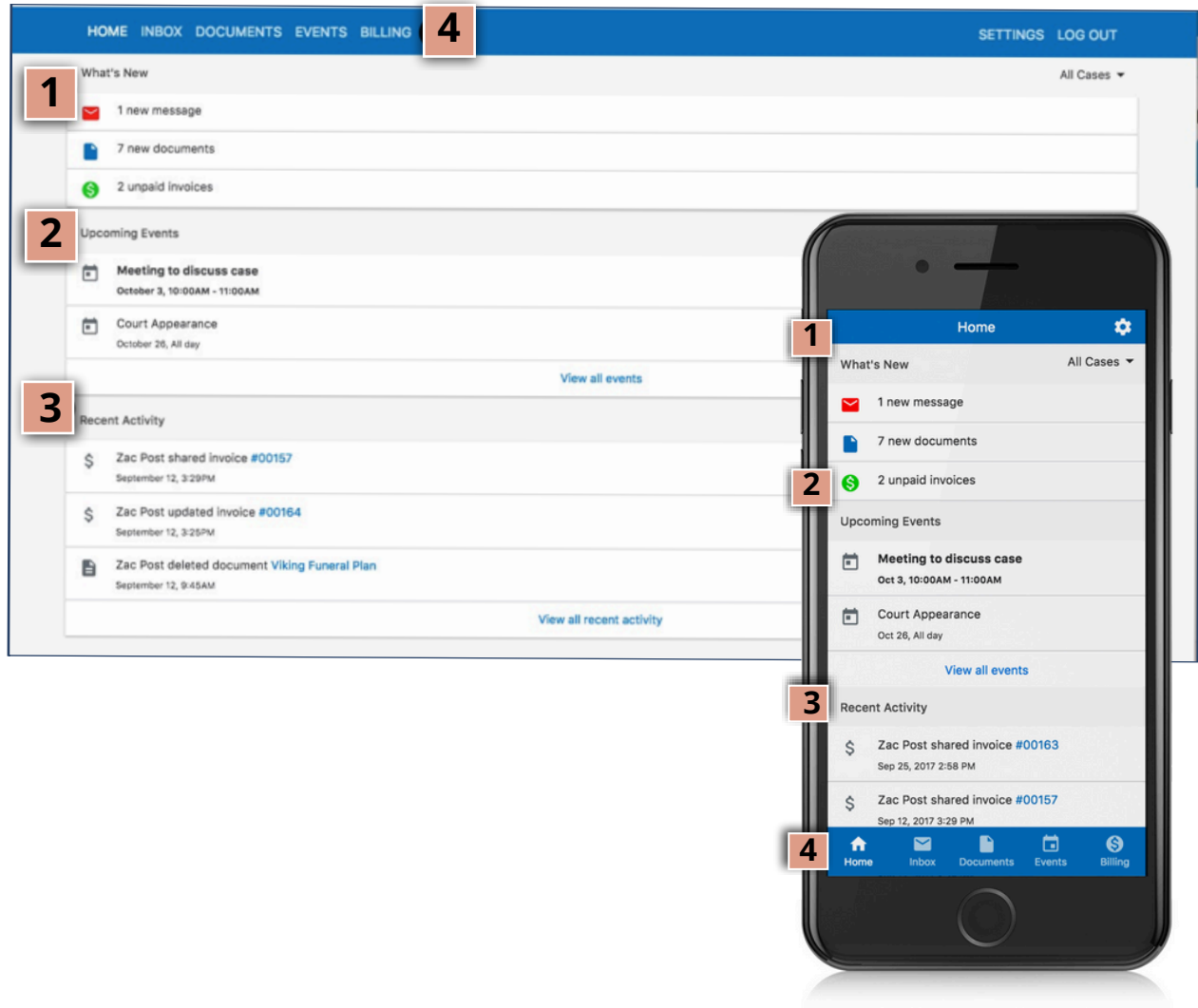
Access Old Client Portal

Clicking the button below will redirect you to the previous version of the client portal.

**ACCESS OLD CLIENT PORTAL**

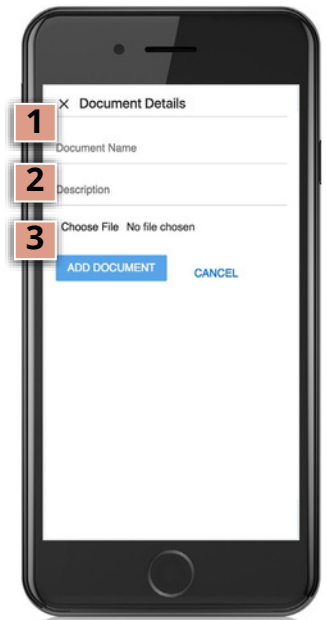
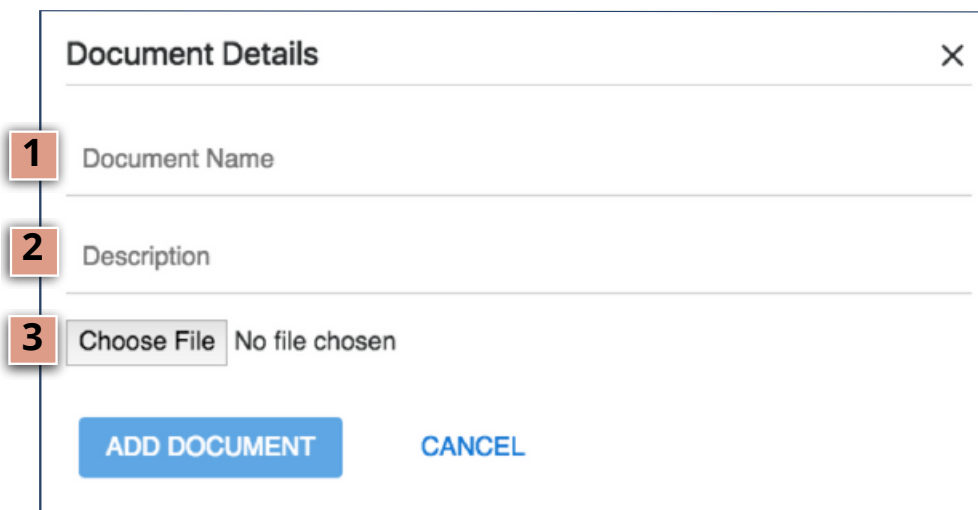
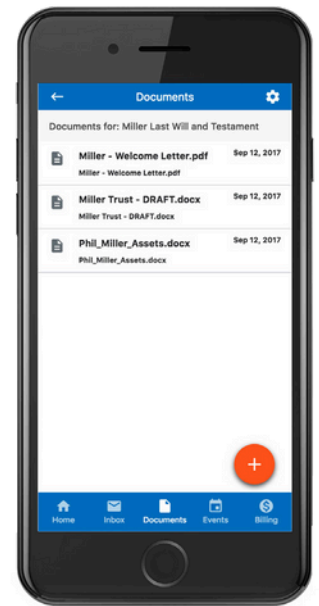
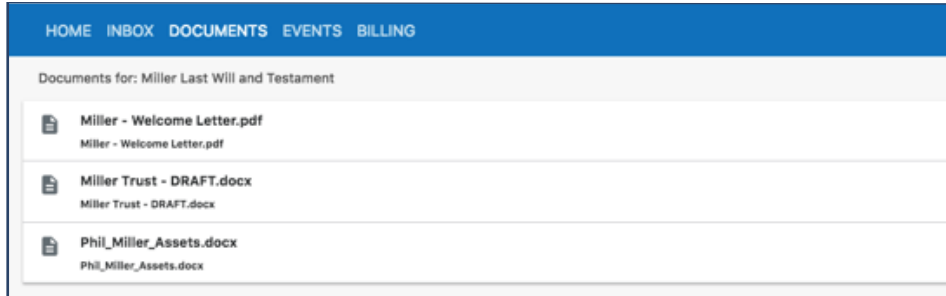
# Home Screen

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



- 1 What's New:** You will receive email notifications when you receive new messages, documents, and invoices we've recently shared with you. This will prompt you to login to MyCase.
- 2 Upcoming Events:** This section will show any upcoming events that have been shared with you in MyCase related to your case.
- 3 Recent Activity:** "The Recent Activity" stream shows you recent updates to your case.
- 4 Menu Tabs:** Use these tabs for easy access to the home screen, messages inbox, case documents, events, and billing.

# Uploading Documents

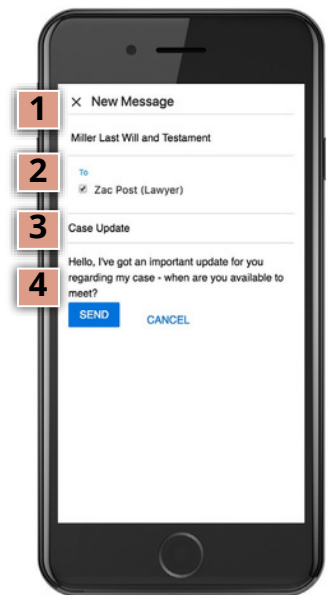
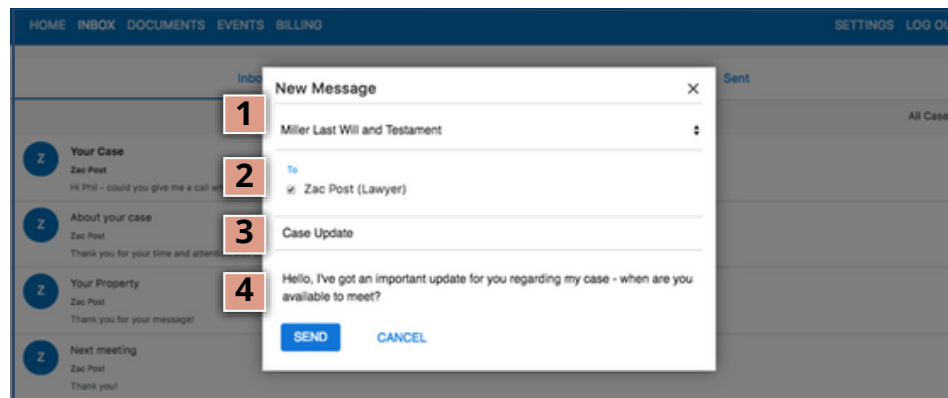
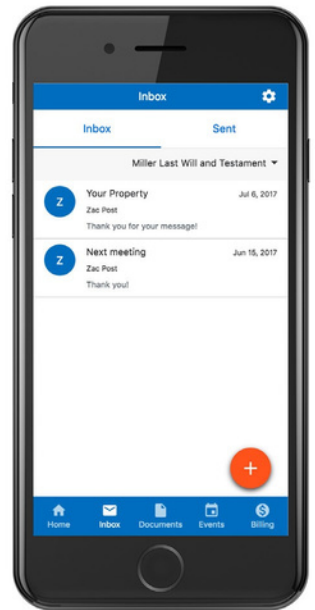
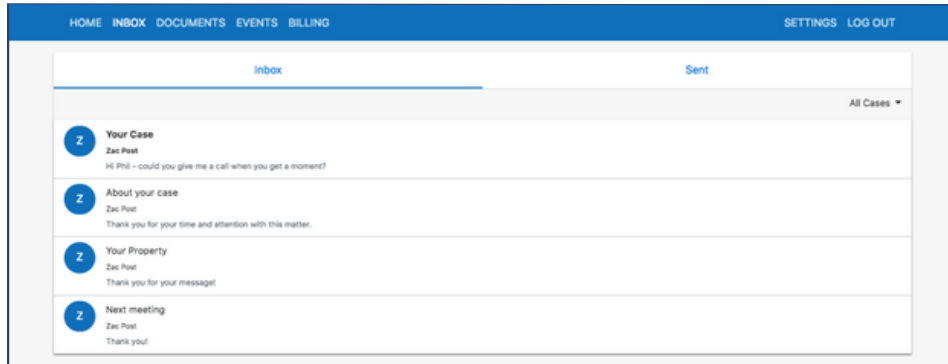


To upload a document, simply **click the + sign in the Documents tab.**

- 1 Enter Document Name:** Type the title of the name you'd like to appear in MyCase for this document
- 2 Enter Description:** Describe the document – it helps to know what you've uploaded when we're notified!
- 3 Add File:** Click "Choose File" to select the document from your devices files (e.g. your desktop, documents folder, photo roll, etc).

Whenever you upload documents, please be sure to send a message letting us know!

# Sending Messages

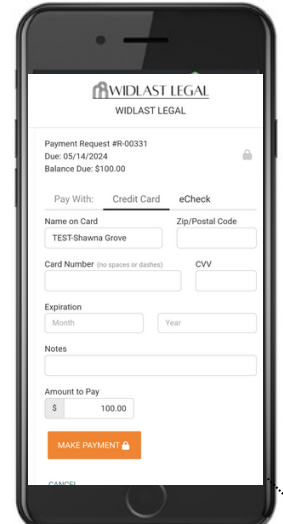
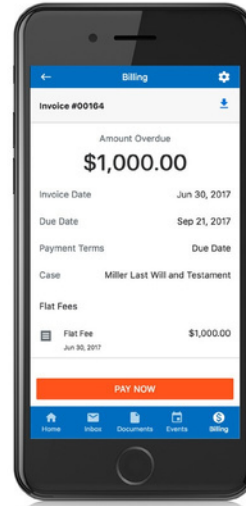
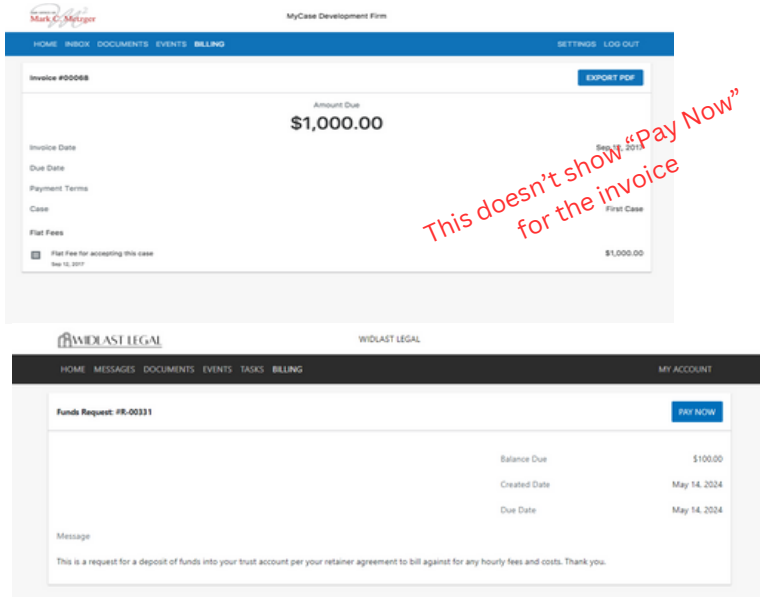
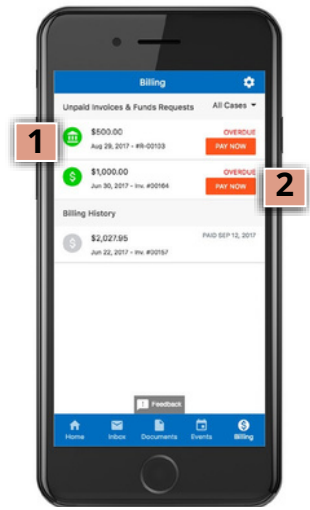
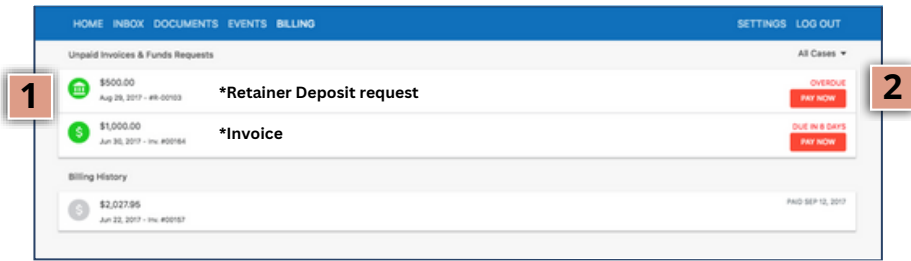


To send a message, simply **click on the + sign in the Inbox tab.**

- 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. **Note:** If you only have a single case, this dropdown does not appear.
- 2 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.
- 3 (and 4) Subject and Message:** Just like an email (but way more secure)!

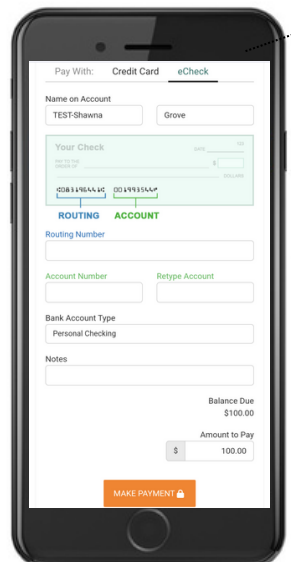
Remember, whenever you upload documents, please be sure to send a message letting us know!

# Paying an Invoice or Retainer Deposit



Click on **Pay Now** to get to a form where you can input your payment information, and make a payment.

- 1 Invoice or Retainer Deposit List:** Click on an individual invoice or retainer request and it will take you into the detail view, and allows you to view the contents of the invoice.
- 2 Pay Now:** Selecting this button will take you directly to a payment screen, where you'll be able to enter your payment information.
- 3 Make Payment:** Enter your payment information, credit card or eCheck, select preferred tab for type of payment and click make payment to pay your invoice or retainer deposit online. It's easy to pay via credit card or eCheck.



\*To make an eCheck payment, you will need to log into your MyCase account, then click on the eCheck tab, all you need is your bank account and routing number, which you can find online or on your checks. When you pay via eCheck, there are no credit card service fees.

**PLEASE NOTE:** Our Firm offers the option to pay fees, costs and retainer deposits via credit cards, as this enables those clients who are unable to pay our fees in cash to nevertheless retain our legal services. However, paying by credit card is not the normal or usual method of paying legal fees or of providing a retainer deposit to the Firm to apply toward payment of legal fees. The credit card companies impose a service fee on each transaction, typically 3%-4% of the total amount charged, with the fee deducted prior to the client's payment being credited to the invoice for our services or to being deposited to the attorney-client trust account to apply toward future legal fees and costs. To avoid raising our rates for legal services to all clients to cover this overhead expense, the Firm passes through the credit card service fee like any other third-party expense that the Firm incurs in providing services to the individual client, with the expense shown on the next invoice to the client. Further, please note that, for those clients who charge the required retainer deposit for the Firm's future fees and costs, the total amount of the deposit into the attorney-client trust account will be the net amount the client put on the credit card less the credit card service fee on that transaction.