

Best Case by STRETTO

# MyCaseInfo<sup>®</sup> Attorney User's Guide

A Best Case<sup>®</sup> Add-on Tool



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# I. ATTORNEY ADMINISTRATION OVERVIEW

## New Interface, Enhanced Features, Better Client Management

This user's guide will help you navigate through the new site and complete the necessary steps to invite a client, view client progress, preview client-entered information, access billing information, view past invoices and manage user accounts in one centralized location.

- 1. Help Center** - For help, information and resources visit the Help Center available throughout MyCaseInfo in the left sidebar.
- 2. Account Management** - Here you can manager your MyCaseInfo including user accounts, billing, instructions and more.
- 3. Sort by Status** - Clients are sorted by their status of the questionnaire for your easy access.
- 4. Search** - Easily find a specific client or view all clients by status.
- 5. Action Buttons** - Automatically see which actions are available for each client based on their status.

The screenshot shows the MyCaseInfo Attorney Administration interface for the Law Office of Lawrence Doe. The interface includes a top navigation bar with contact information and account management links. A left sidebar contains navigation options like 'All Clients', 'Active Clients', 'Completed Clients', and 'Unconfirmed Clients', along with an 'Invite New Client' button and a 'Help Center' button. The main content area displays 'Active Clients' with a search bar and a table of client progress. A detailed view for 'Tessa Smith' is shown, including personal information, dates, and action buttons like 'Preview', 'Export', 'Client Login', and 'Resend'. A VeriSign logo is visible in the bottom left corner.

**1** Help Center

**2** Account Management | | Logout

**3** Active Clients

**4** Search

**5** Action Buttons

Name	Completed	Status
+Tessa Smith	14% Completed	In Progress
-Janie Jones	14% Completed	In Progress
+Ted Thompson	0% Completed	In Progress
+Sally Johnson	0% Completed	Ready to Download
+Jane Sample	50% Completed	In Progress
+Beth Johnson	0% Completed	In Progress
+Andrew White	0% Completed	In Progress

## II. HELP CENTER

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### Documents

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- Getting Started Guide
    - The Getting Started Guide offers concise, easy-to-understand overview of the basics of using MyCaseInfo.
  - Client Questionnaire List
    - The Client Questionnaire List gives a complete breakdown by section of each question in the questionnaire.
  - Frequently Asked Questions
    - Browse a list of frequently asked questions from other attorneys about MyCaseInfo.
- 

### Web Tutorials

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Watch these short, recorded demonstrations that walk you through tasks necessary for using MyCaseInfo.

- Questionnaire Management
  - Invite A Client
  - Account Administration
  - Client Questionnaire
- 

### Online Seminar

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Sign-up for a live online seminar that will walk you through how to use MyCaseInfo to help you streamline your workflow and reduce data entry. Visit [www.bestcase.com/cus\\_support.htm](http://www.bestcase.com/cus_support.htm) and clicking on **Online Seminars**.

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### Technical Support

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If you need immediate assistance get your questions answered by a technical support specialist.

- Monday - Friday 8:00am - 5:30pm CT
  - Phone: 1.800.492.8037
  - Email: [help@bestcase.com](mailto:help@bestcase.com)
- 

Technical Support is only available with an active Best Case Bankruptcy maintenance package.

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### What's New

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View all updates and changes that have occurred to MyCaseInfo by visiting [www.bestcase.com/whatsnewstate.htm#mci](http://www.bestcase.com/whatsnewstate.htm#mci)

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### III. INVITE A CLIENT TO MYCASEINFO

Follow the steps below

1. Click the **Invite a New Client** button.
2. Enter the client's full name, phone number and email.

**Note** *Client emails can only be used one time. MyCaseInfo will let you know if the email is available to use or if it has previously been used.*

3. Select the 'Expected Completion Date'. By default, this date will be 5 days from today's date.

**Note** *The Expected Completion Date is especially important for those clients that you wish to complete the paycheck calculator. If you invite a client at the end of the month but you won't file their petition until the next month, you will no longer have up-to-date information – unless you change the Expected Completion Date to be sometime during the next month.*

4. Select options and set preferences for the following items:
  - Questionnaire Sections
  - Paycheck Calculator
  - Instructions
  - Request Tax Returns Thru

**Note** *To edit the default instructions, see page 21.*

- Send Options

**\* TIP:** *Save these options as default to be applied to all new clients.*

5. Include any specific additional instructions for your client such as, Remember to include spouse unemployment in the Income section.

6. Select how you want to send the email.
  - Via MyCaseInfo
  - Via My Email Program - Copy and paste the information from the provided email to your preferred web based email program to send the invitation email.

**\* TIP:** *If you use a desktop client email program like Outlook, you don't have to copy and paste. Just send the invitation!*

#### Invite a Client

\* Required Fields  
Switch to: 3 Step

---

**Step 1 of 3: Basic Information**

\*Full Name:

\*Phone:   
Ex: 777-777-7777

\*Email:

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**Step 2 of 3: Client Options**

**Income Information**

\*Expected Completion Date:  /  /

Current Income Period: 10/2012 thru 03/2013

\*Request Tax Return Uploads Through Year:

**Instructions/Questionnaire Options**

Select the set of instructions to use. [Edit Instructions](#)

You can save separate sets of instructions and send them to users by using the check boxes below. If you have instructions you would like to send to only one client, use the 'Special Instructions' field.

Instructions  Chapter 7  
 Chapter 13  
 None

Please select the sections of the questionnaire that you would like your client to complete

Questionnaire Sections  Income  Property  Debts  
 Expenses  Miscellaneous  Documents

\*Paycheck Calculator  Use Paycheck Calculator for this client  
 Don't use Paycheck Calculator for this client  
Means Test income information will not be available if you disable the paycheck calculator.

Save Options as Default?

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**Step 3 of 3: Send Questionnaire**

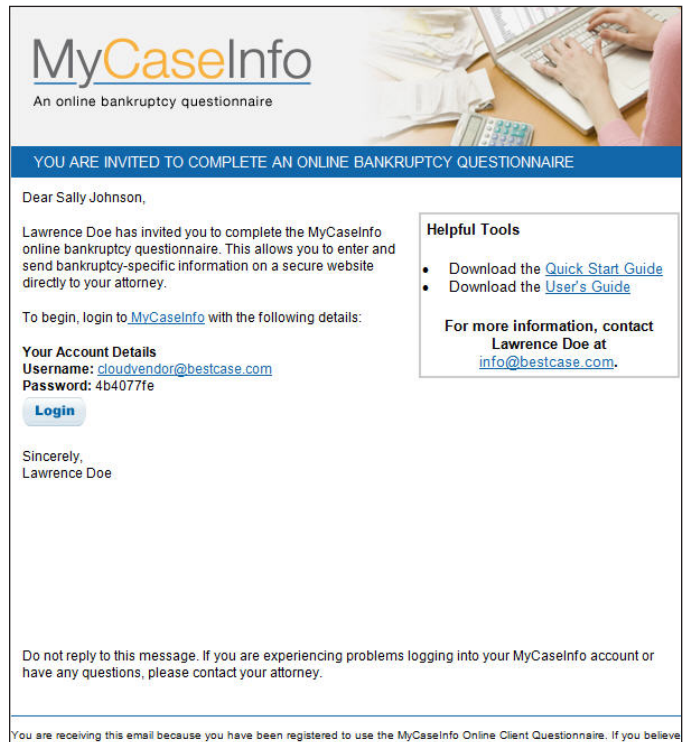
\*Send Options  CC Attorney Email: jreagan@bestcase.com  
 Send Via MyCaseInfo  
Default. Sends email via the MyCaseInfo website.

\*Send Options  CC Attorney Email: jreagan@bestcase.com  
 Send Via MyCaseInfo  
Default. Sends email via the MyCaseInfo website.

Send With My Email Program  
Use this to edit the invitation text and send it via your mail program of choice(Outlook, Gmail, Hotmail,etc.)

Special Instructions:

7. Click **Send**.
8. The email that is generated to your client includes:
  - MyCaseInfo username and password
  - MyCaseInfo link
  - Chapter 7 or Chapter 13 instructions
  - Client-specific special instructions
  - Links to helpful tools including the Quick Start PDF, User's Guide and short videos
  - Attorney Contact Name and email



**Sample Invite Email to Client:** When you invite your client to use MyCaseInfo, they will receive the above email.

## IV. CLIENT MANAGEMENT

This section explains how clients are defined, organized and displayed in MyCaseInfo. Plus discover what information you can view, edit and manage for each client.

### Sorting and Viewing Clients

#### Sort by Category

- The left sidebar provides four categories you can select to view your clients:
  - All Clients
  - Active Clients
  - Completed clients
  - Unconfirmed clients
- Categories are color-coded for easy reference:
  - Green: In Progress and Ready to Download
  - Grey: Downloaded and Deleted clients
  - Orange: Unconfirmed clients

#### Sort by Name

Click **Name** above the list of clients on the left. The arrow denotes ascending or descending alphabetical order.

#### Sort by Status

Click **Status** above the list of clients on the right. The arrow denotes ascending or descending alphabetical order.

#### Search by Name

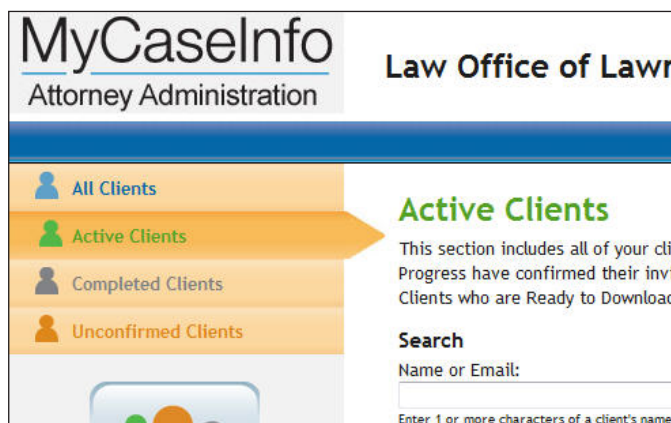
Type in the first few letters of a client's first or last name and MyCaseInfo will show similar options. Either type the full name or select from the dropdown list and click **Go**.

#### Search by Status type

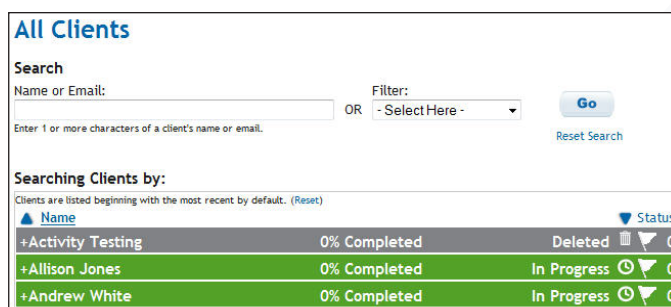
Select a status from the dropdown menu and click **Go** to view all clients of that status only.

#### Search for Open Flags

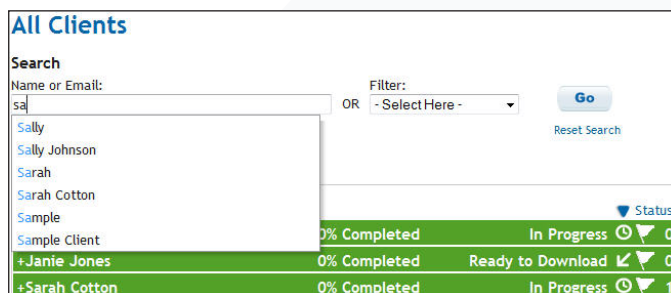
Select **Open Flags** to view all clients that have at least one.



**Sort by Category:** Easily navigate between active, completed and unconfirmed clients.



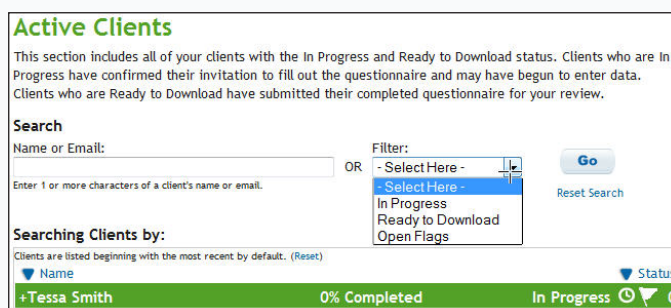
**Sort by Name or Status:** Quickly and easily sort clients alphabetically by name or by their status.



**Searching Clients:** Find a specific client quickly by typing their name in the Name Search box.



*You can have multiple clients expanded at the same time.*



**Filters:** View all clients by status.



### Client Progress Definitions

Category	Status Type	Description	Action Buttons
Active Clients	In Progress	Clients that have accepted the MyCaseInfo invitation. These clients are considered In Progress and are in various stages of entering information but have not completed the questionnaire nor have submitted.	<ul style="list-style-type: none"> <li>■ Preview</li> <li>■ Client Login</li> <li>■ Resend</li> </ul>
Active Clients	Ready to Download	Clients that have completed the questionnaire and submitted for review. These files are ready to be purchased. Note: The client can no longer access the questionnaire, their account is locked.	<ul style="list-style-type: none"> <li>■ Preview</li> <li>■ Purchase</li> <li>■ Resubmit</li> </ul>
Completed Clients	Downloaded	Files that have been purchased and downloaded. Once purchased, the file can be exported an unlimited number of times. Note: The client can no longer access the questionnaire, their account is locked.	<ul style="list-style-type: none"> <li>■ View PDF</li> <li>■ Preview</li> <li>■ Export</li> </ul>
Completed Clients	Deleted	These files were deleted by a user but can be previewed and are not listed with active clients.	<ul style="list-style-type: none"> <li>■ Preview</li> </ul>
Inactive Clients	Inactive	By default, MyCaseInfo will mark a client as Inactive after 120 days without a successful login. You can change the number of days or disable this feature under Account Management > User Preferences	<ul style="list-style-type: none"> <li>■ Preview</li> </ul>
Unconfirmed Clients	Unconfirmed (Invited)	Clients who have been invited to MyCaseInfo but have not yet confirmed registration by reading and accepting the MyCaseInfo notices.	<ul style="list-style-type: none"> <li>■ Remove</li> <li>■ Resend</li> </ul>

### Action Buttons

#### Resend Client Invitation Email

Resend the invitation email to your client with their login information if they lost or deleted their original email. Click the Resend button on the Progress Tab. This action is available for clients with the status of: In Progress and Unconfirmed.

#### Preview Client Information in a Browser

Previewing the client information allows you to get detailed information about what your client has entered or not entered into the questionnaire. Click the **Preview** button on the Progress Tab. Information can be viewed in two formats - Questionnaire or Classic View. *This action is available for clients with the status of: In Progress, Ready to Download, Downloaded and Deleted.*

#### Resubmit Questionnaire to Client

Send the questionnaire back to your client and allow them to add or update additional information before you purchase and download. *This action is available for clients with the status of Ready to Download only.*

1. Click **Resubmit** on either the Progress Tab or on the Preview Client Information page.
2. Enter any comments you wish to send to your client.
3. Click **Send**.

#### View PDF of Client Information

Viewing the client information as a PDF is the same as previewing the client's information but gives you an easier way to print and save the information if desired. Click the **PDF** button on the Progress Tab. *This action is available for clients with the status of Downloaded only.*



## Client Management

### Login to MyCaseInfo as the Client

Login to MyCaseInfo as the debtor to edit or add information for them. Click the **Client Login** button on Progress Tab. *This action is available for clients with the status of In Progress only.*



### Remove Unconfirmed Clients

Remove a client if you invited them but they never logged in and activated their MyCaseInfo account and you want to delete their account. Click the **Remove** button on Progress Tab. *This action is available for clients with the status of Unconfirmed only.*



### Purchase a Client File

When a client file has been completed and you wish to import into Best Case or if you want to see the documents your client uploaded, purchase the client file to download and import. Click the **Purchase** button on the Progress Tab. See page 16 for more information. *This action is available for clients with the status of In Progress or Ready to Download Only.*



### Export a Client File

Export a client file to download a client file that has previously been purchased. Click the **Export** button on Progress Tab. *This action is available for clients with the status of Downloaded only.*



## Client Table Features

### Progress Tab

The Progress Tab delivers the following:

- **Percent Completed:** The percentage of categories that your client has completed. Once your client has answered every question in a category, it is marked as completed.
- **Questionnaire Section Status:** **Not Started**, **In Progress** or **Completed** is displayed for each section identifying what the debtor has completed.
- **Action Buttons:** Depending on the client's status, the following buttons may be available:
  - **Preview** – View a summary of client-entered data.
  - **PDF** – Create a PDF document of the client-entered data.
  - **Client Login** – Enter data into MyCaseInfo as the debtor.
  - **Resubmit** – Send the questionnaire back to the debtor to complete additional information.
  - **Purchase** – Purchase and download the client file.
  - **Export** – Download the client file again for import.
  - **Remove** – Delete the invite to the debtor.
  - **Resend** – Resend invitation email to client containing their login information.

**Note** See *Client Progress Chart* on above for details.

**MyCaseInfo Attorney Administration** | Law Office of Lawrence Doe | 500 Davis Street, Suite 800, Evanston, IL 60201 | Phone: 800-492-8037, Fax: 847-492-8038, www.bestcase.com | Account Management | Logout

**Active Clients**  
This section includes all of your clients with the In Progress and Ready to Download status. Clients who are in Progress have confirmed their invitation to fill out the questionnaire and may have begun to enter data. Clients who are Ready to Download have submitted their completed questionnaire for your review.

**Search**  
Name or Email:  Filter:  OR

**Searching Clients by:**  
Clients are listed beginning with the most recent by default. (Reset)

Name	Percent Completed	Status	Action
Tasha Smith	0% Completed	In Progress	<input type="button" value="Preview"/> <input type="button" value="PDF"/>
Janie Jones	0% Completed	Ready to Download	<input type="button" value="Preview"/> <input type="button" value="PDF"/>
Sarah Cotton	0% Completed	In Progress	<input type="button" value="Preview"/> <input type="button" value="PDF"/>
Ted Thompson	0% Completed	In Progress	<input type="button" value="Preview"/> <input type="button" value="PDF"/>
Sally Johnson	0% Completed	In Progress	<input type="button" value="Preview"/> <input type="button" value="PDF"/>
Jane Sample	50% Completed	In Progress	<input type="button" value="Preview"/> <input type="button" value="PDF"/>

**Percent Complete: 14**

**Personal Information In Progress** | **Date Invited:** 10/10/2012  
**Income In Progress** | **Date Confirmed:** 10/10/2012  
**Property Not Started**  
**Debts Not Started**  
**Expenses Not Started**  
**Miscellaneous Not Started** | **Uploaded Documents:** Yes (Available For Download After Purchase) |

Percentage complete reflects the percentages of categories completed. Once your client has answered every question in a category, it is marked as completed.

**Progress Tab:** Overview of data that has been entered.

### Edit Client Tab

The Edit Client Tab allows you to update basic information about the client including name, email address (login name), password, phone number and status.

- Edit Client Information
  - Update desired client information and click **Save**.
- Change a Client's Status: You are able to manually change the status of your client. Choose from the following dropdown menu options:
  - **In Progress Clients:** Change the status to Ready to Download or Deleted.
  - **Ready to Download Clients:** Change to In Progress or Deleted status.
  - **Downloaded Clients:** Change to In Progress, Ready to Download or Deleted.
  - **Deleted Clients:** Can not change status.

**Note** Downloaded clients changed to In Progress will be able to access their account again. If you re-download you will not be charged again.

- Select displayed Categories: You are able to show or hide sections of the questionnaire for this particular client. To have a category show make sure the box is checked. To save any changes, click **Save**. Available sections to show/hide:
  - Income
  - Property
  - Debts
  - Expenses
  - Miscellaneous
  - Documents
- Paycheck Calculator: You can change the option to hide or show the paycheck calculator for this particular client. Click 'Save' to save your changes.
- Expected Completion Date: Change the Expected Completion Date at any time to have your client give you the correct information for the six month average based upon the Expected Completion Date.
- Tax Returns

### Flagged Questions Tab

When your client has a question about a particular section or question in MyCaseInfo, they can add a flag to the question and list any additional comments they have. You are able to view and respond to the flag.

- The question flagged by your client will be listed.
- Click **View/Respond To Flag** to see additional comments entered by your client.
- Enter your response and click **Save**.
- If the flag has been completed, click **Close Flag**. Reopen the flag at any time by clicking **Reopen Flag**.

**Edit Client Tab:** Update basic information about your debtor, including manually changing the Client Status.

**Flagged Question Tab:** View and respond to client flags

## Client Management

\* **TIP:** You can select to receive an email notification when your client flags a question. See page 18 for more information.

### Activity Tab

Easily make notes regarding a client's case, such as notating when the client called in to ask a question.

- Enter subject and notes in the box and click **Save**.
- Some events have activities automatically created for you! Click **Details** to see more information regarding a particular activity. You can also **Edit** or **Delete** some activities.
  - Invite a Client
  - Client Confirmed Invitation
  - Questionnaire Submitted by Client
  - Questionnaire Resubmitted to Client
  - Emailed Client
  - Client Status Changed
  - Questionnaire Purchased
  - Questionnaire Downloaded
  - Questionnaire was Billed

**Note** Some activities can not be edited or deleted.

**Note** Notes are not connected to the questionnaire and do not import into Best Case.

### Email Client Tab

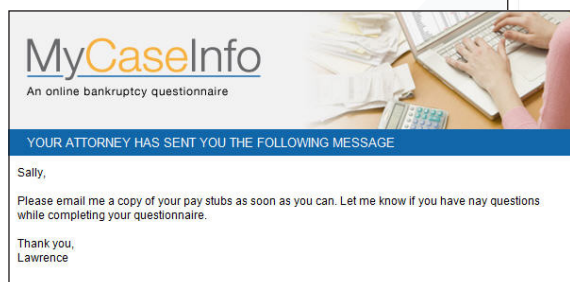
Quickly and easily email your client without ever leaving MyCaseInfo.

- Enter the subject line and message and click **Send**.

\* **TIP:** To bcc: yourself select the check box.

**Activity Tab:** Keep detailed notes online during the MyCaseInfo process.

**Email Client Tab:** Easily email your client without leaving the software.



## V. CLIENT QUESTIONNAIRE

### Flagged Questions by Client

As your client is entering their information throughout the questionnaire, they may have a question on a particular entry or question and add a flag for your assistance. When your client first adds a flag to a question, you will be notified by email. See page 10 for more information on viewing and responding to flags.

\* **TIP:** See your client's flags on the Preview page along with the information they may have entered.

The screenshot shows a 'Flag' notification box. The question is: 'Did you receive additional income from the past two years?'. The client's response is: 'I lost my job at the end of 2008 but received my last paycheck in 2009. Do I need to list this income?'. Below the question, there is a 'Responses' section with the text: 'Yes, please list that income. Johnny Johnson on 02/17/2011'. At the bottom of the box, there is a 'Respond' button and a link to 'View All Flags'.

**Client Flags:** Your client might flag a question that they require your assistance on.

### Edit Information Entered by Client

As you review the information entered by your client you might come across some information that you want to change. Easily update information entered by your client through the Preview page (see page 8 for more information).

- To add a new set of information:
  1. Click **Add** in the right column for the question you want to add.
  2. Enter information and click **Save**.
- To edit an existing set of information:
  1. Click **Edit** in the right column for the information you want to change.
  2. Make desired changes and click **Save**.
- To delete a set of information:
  1. Click **Delete** in the right column for the information you want to remove.
  2. Click **Ok** in the pop-up window to confirm delete.

**Note**

Deleting information is permanent and can not be undone.

The screenshot shows the 'Employment' section of the client questionnaire. It includes a table of employment details and a 'Most Recent Paycheck' section.

Employment	
Are you employed? Answered Yes	
Employer	Best Buy
Occupation	Sales
Address	1234 5th Ave
City, ST ZIP	Chicago, IL 60606
Employed For	2 Years, 3 Months
Pay Frequency	Weekly
Wages	500.00
Overtime	50.00
FIT	100.00
FICA	50.00
Medicare	20.00
SIT	75.00
Other Tax	0.00
Insurance	50.00
Union Dues	0.00
Period Gross Income	550.00
Total Deductions	295.00
Net Pay	255.00
Monthly Net	1105.00
Monthly Average from 12/11 thru 05/12	1105
Month 1	1020.00
Month 2	1275.00
Month 3	1020.00
Month 4	1020.00
Month 5	1275.00
Month 6	1020.00

**Most Recent Paycheck**  
Total Number of Checks: 28

**Preview Information:** Edit your client's information directly from the preview page.

## Client Questionnaire

### Incomplete Questions

Your client may come across a question that applies to them but they don't have all of the necessary information at the time.

1. Enter all known information at this time.
2. Check the **Save this information for now and return to it later** box and click **Save**.

Before your client can submit the questionnaire to you for review, they will need to enter any missing information for incomplete questions before proceeding.

**Incomplete Questions:** Save questions with known information and come back to them later.

**Send to Attorney:** Your client will be prompted to finish all incomplete questions before submitting the questionnaire to you.

### Document Center

Your clients can upload pay stubs, tax returns and certificates of credit counseling directly through MyCaseInfo. You will be able to see the description and types of documents your client uploaded but you cannot view the document itself until the questionnaire is purchased.

1. On the **Progress** tab, click **Preview in Download Center**.
2. The Download Center will open, allowing you to see the name, size and type of document along with how long this document will be available.

To view the document, click **Purchase** to purchase the questionnaire and download the documents. Your client will not be changed to a downloaded status until you export the file.

1. Download documents individually by clicking **Download** next to the desired document.
2. To download all documents at once, click **Download All Files as ZIP**.

File Name	Upload Date	Available Until	File Size	Description
MCIUSG_2D_0812.pdf	10/23/2012	11/23/2012	12.13 MB	Paychecks

**Download Center:** View a list of documents your client has uploaded. These documents may include pay stubs, tax returns and more.

## Client Questionnaire

### Review Process

As you review the information entered by your client you can make notes about specific questions or entries that were made. To add a note for your client to review.

1. Click **Add Review Note!** for the desired question or entry on the Preview Client Information page.
2. Enter any comments you wish to send to your client.
3. Click **Save**.

**Note** Needs Review notes are not sent to the client until you resubmit the questionnaire to your client. See page 8 on how to resubmit a questionnaire.

Once you have resubmitted the questionnaire back to your client, they will receive an email stating that you have marked several sections for review. When the client logs back into MyCaseInfo, they will see a screen similar to the right.

On the Review or Send to Attorney screens, your client will be able to go directly to one of your Needs Review Notes to read and address your note. The client can edit their information and type a message of their own regarding the Needs Review.

Note before they send the questionnaire back to you. Once a Needs Review Note has been completed, click **Mark as Complete** to close the note.

\* **TIP:** Have a completed Needs Review Note that needs to be re-addressed? Click Reopen Note to reactivate the note and add a message.

**This action is available for clients with the status of Ready to Download only.**

**Needs Review Notes:** Make a note exactly where you want your client to edit their information.

\* **TIP:** Did your client skip a question? Click **Show Unanswered/Empty Questions** and add a Needs Review Note for your client to answer that question.

**Client Login:** Notes to your client are brought to their attention when they log back into MyCaseInfo.

**Client Review:** Your client can easily respond to your notes and make adjustments to their questionnaire information.

**Completed Note:** Mark a note as complete once your client has finished the task.

## Delete or Remove a Client File

If you are no longer representing a client's bankruptcy or you have finished a bankruptcy case then you can delete or remove the client file to keep your active and unconfirmed client lists better organized.

- To delete an a confirmed client:
  1. Go to the **Active** or **Completed Clients** in the left sidebar.
  2. Click on desired client's colored bar.
  3. Select the **Edit Client Tab**.
  4. Change the client status to **Deleted** and click **Save**.
- To remove an unconfirmed client:
  1. Select the **Unconfirmed Clients** in the left sidebar.
  2. Click on desired client's colored bar.
  3. Click **Remove**.

**WARNING:** *By removing a client, it will permanently be removed from MyCaseInfo and the client account will also be deactivated.*

## VI. PURCHASE A CLIENT FILE

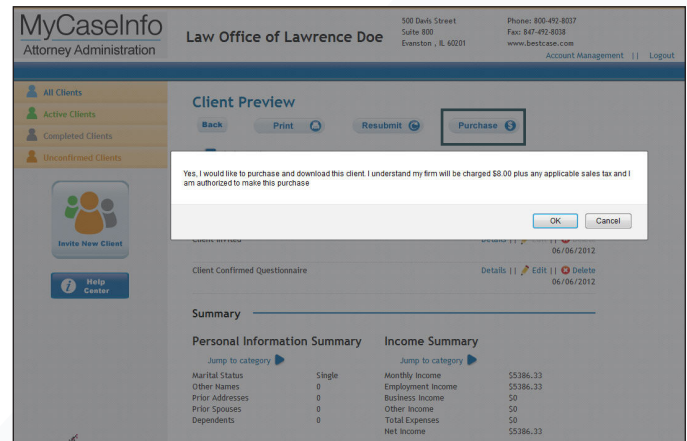
### Purchase and Download a Client File

Once you are satisfied with the information provided by your client you can purchase the questionnaire and download directly into a new or existing client file within Best Case Bankruptcy.

**Note** *The client must have a status of Ready to Download to purchase the file.*

- Click **Purchase** on either the Progress Tab or from the Preview Client Information page.
- You will be prompted to confirm that you want to purchase the client file and understand that at this time you will be charged \$8 plus applicable tax.
  - If you don't want to purchase and download at this time, click **Cancel**.
  - If you are sure you want to purchase and download at this time, click **OK**.
- A dialog window asks you if you want to Open or Save this file, choose **Save**.
- Select where you would like to save this file. Client files must be in a .bci file format.

\* **TIP:** *Save to your desktop for easy finding. After you import into Best Case Bankruptcy you can either move the file to another location or delete it.*



**Purchase a Client File:** Purchase and download the client file from the Preview screen or the Progress Tab.

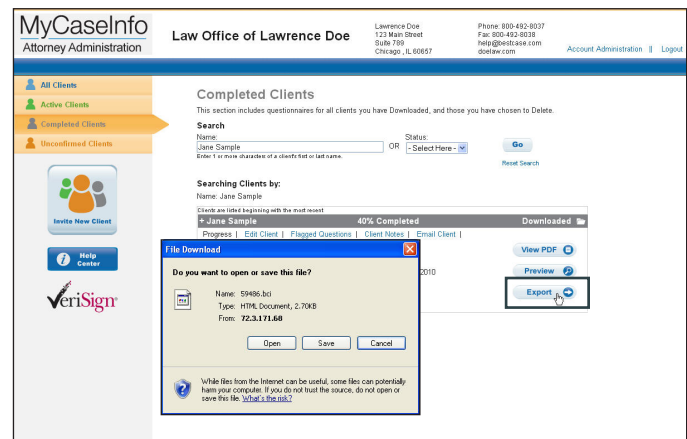
### Export a Client File



After you have purchased a client's questionnaire, you are able to download the file as many times as you need.

- To re-download the questionnaire:
  1. Click **Export** on the Progress Tab or from the Preview Client Information page.
  2. A window will open asking what you want to do with this file, to Open or Save – choose **Save**.
  3. Select where you would like to save this file.  
**Client files must be in a .bci file format.**

\* **TIP:** *Save to your desktop for easy finding. After you import into Best Case Bankruptcy you can either move the file to another location or delete it.*



**Export a Client File:** Re-download the client file as many times as you need with the Export option.

## VII. IMPORT A CLIENT FILE INTO BEST CASE BANKRUPTCY

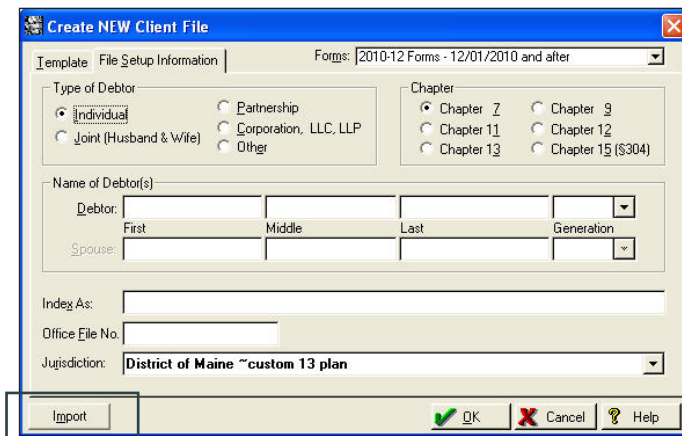
### Import into a new or existing client file

#### New Client

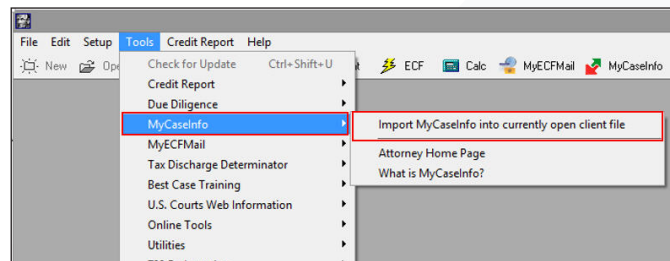
1. In Best Case, create a new client file.
2. Click **Import** in the lower left hand corner of the screen.
3. Navigate to location where you saved the client file.
4. Select the client file you would like to import.
5. Click **Open**.
6. The client name should fill in automatically. If it did not or you want to change it, do so now.
7. Click **OK**.
8. Your client file has now been created!

#### Existing Clients

1. Open the client file that you wish to import data into. The list of forms and schedules will be displayed.
2. On the top tool bar go to **Tools → MyCaseInfo → Import MyCaseInfo into currently open client file**
3. Select the .bci file you want to import from the location you saved the file.
4. Click **OK**.
5. Select which sections you want or don't want imported.
6. Click **OK**.
7. Your information has now been imported!



**New Client File:** Create a new client file and directly import the .bci file with the import button.



**Existing Client File:** Import specific data into an open client file.

## VIII. ACCOUNT MANAGEMENT

You are able to manage and update your MyCaseInfo account including billing information, firm information, user accounts, past invoices and various customization options here. To access this area, click **Account Management** in the upper right-hand corner of the screen.

### Firm Information

See and edit data currently listed for your firm. It is important to keep this information up-to-date as it is listed in the client site. If you need to update your firm name, please call 800-492-8037 and speak to a representative.

#### Update Law Firm Information

1. Click **Edit Contact**.
2. Enter updated data.
3. Click **Save**.

### Firm Users

You can add, update and delete individual user accounts.

#### Change Login Information

To change the Login Name and Password you were given:

1. Click **Change Login**.
2. Enter new Login Name, Password and confirm Password.
3. Click **Save**.

#### Add User

Create separate Login Names and Passwords for each user in your firm.

1. Click **Add User**.
2. Enter the user's name and email address.
3. Click **Save**.
4. The user will receive a welcome email with their login information

#### Update Existing User Information

- Easily update a user's name or email who has MyCaseInfo
  1. Click **Edit** next to the user you would like to update.
  2. Update name and/or email.
  3. Click **Save**.
- Delete a user that is no longer working for your firm and restrict access to your firm's MyCaseInfo account.
  1. Click **Edit** next to the user you would like to delete.
  2. Change status from Show to **Delete**.
  3. Click **Save**.

#### User Preferences

Change your email notifications which are applied to all clients including reminder emails to Unconfirmed Clients. You can also set preferences for auto formatting, masking account numbers and time settings for making clients Inactive.

#### Edit User Preferences

\* Required Fields

Use the below checkboxes to indicate when you would like to receive email notifications from MyCaseInfo.

Client Questionnaire Created  
 Client Flag Added  
 Client Responds to Flag  
 Client Responds to Review Note  
 Client Submit Questionnaire  
 Client Reminder If Unconfirmed After 3 Days  
 Client Reminder If Unconfirmed After 7 Days  
 Client Reminder If Unconfirmed After 14 Days  
 Client Deactivates an Invitation  
 Firm Billed

If you would like to automatically format your client's input, you can choose either an UPPERCASE, Title Case or lower case filter.

\*Client Text Auto-Formatting
   
 None
   
 Transform Text to Title Case
   
 Transform Text to UPPERCASE
   
 Transform Text to lower case

By default, MyCaseInfo only stores a masked version of your client's credit card number. If you want to receive the full account number, you can choose to do so below.

\*Mask Card Number
   
 No
   
 Yes

You can now chose how Joint Property is categorized. Users in Community Property states will most likely want to enable this option.

\*Use 'Community' Property For Joint Property
   
 Joint
   
 Community

By default, MyCaseInfo prevents clients from submitting questionnaires with incomplete records. If you would like to bypass this restrictions, click Yes below. Please note that you may receive warnings or errors when the client is imported into Best Case.

\*Bypass All Submission Holds
   
 No
   
 Yes

## Client Questionnaire Hints

With questionnaire hints you can add additional information to questions to assist your clients as they go through the questionnaire.

**Note** *These hints apply to all clients.*

### Add a Hint

1. Click **Add or Edit Hints**.
2. Select the question you want to add a hint to from the dropdown list.
3. Type your hint into the Question Hint and/or Form Hint boxes click **Save**.

\* **TIP:** *You can create only a Question Hint or a Form Hint. You are not required to create both.*

### Edit a Hint

1. Click **Add or Edit Hints**.
2. Click **Edit** next to the corresponding question you would like to change.
3. Make your desired changes and click **Save**.

### Delete a Hint

1. Click **Add or Edit Hints**.
2. Click **Delete** next to the question hint to delete.

### Client Questionnaire Hints

Use Client Questionnaire Hints to add your own custom text to a question screen (where the initial questionnaire question is asked) or to the entry screen itself. Use these hints to give your client additional information on how they should complete a form or provide some clarification on the question itself.

- Question Hints are displayed in MyCaseInfo when your client is asked a question.
- Form Hints are displayed after your client answers a question and is brought to the corresponding entry screen.

To browse a list of titles and questions, please click [here](#).

You can view any previously entered hints below to edit or remove them. Hints are only applied to clients using this attorney account.

\* Required Fields

\*Select a Question

Question Hint

Form Hint

**Save** **Back**

If you have previously entered a client questionnaire hint, it will show below. Click 'Edit' or 'Delete' to manage these hints.

Question Title:	Name & Address	<a href="#">Edit</a>   <a href="#">Delete</a>
Form Hint:	If email is the best way to contact you, please list as well.	

**Client Questionnaire Hints:** Add additional information and tips to assist your client while they complete the questionnaire.

### Personal Information

Question 7 of 7 in Personal Information

**Do you support anyone financially?**

**Note from your attorney:**  
This includes anyone you claim as a dependent on your taxes.

[Yes](#)

[No](#)

**Client Questionnaire Hints:** Hints can be added to a question (above) and/or form (below) to help your clients throughout the questionnaire.

### Personal Information

Question 7 of 7 in Personal Information

**Do you support anyone financially?**

**i** Enter each record separately. After clicking save, you will have the opportunity to add additional items.

**Note from your attorney:**  
Only give specific information if the person is over 18 years old.

\* Required Fields

What is their name?

## Instructions

Add to or edit the default Certification language that your client must agree to before submitting the questionnaire. Plus create customized Chapter 7 and 13 instructions that you can include in the email invitation sent to your clients.

**Note** *These instructions are used for all clients. For client specific instructions, please enter in the Specific Instructions text area when inviting your client. See page 6 for details.*

### Create Chapter 7 and Chapter 13 Instructions

There are no default instructions included in the email invitation sent to your client. Create specific instructions for Chapter 7 or Chapter 13 clients to help them complete the questionnaire.

1. Click **Edit Instructions**.
2. Enter your desired instructions in the text box for Chapter 7 and/or Chapter 13.
3. Click **Save**.

✳ **TIP:** *To include your instructions in the email invitation that is sent to your client, select the Chapter 7 or Chapter 13 option on the Invite a Client screen.*

The screenshot shows the 'MyCaseInfo Attorney Administration' interface for the 'Law Office of Lawrence Doe'. The top right corner displays contact information: Lawrence Doe, 123 Main Street, Suite 750, Chicago, IL 60657, Phone: 800-492-8037, Fax: 800-492-8038, law@bestcase.com, doelaw.com. The sidebar on the left has navigation links: All Clients, Active Clients, Completed Clients, Unconfirmed Clients, Invite New Client, Help Center, and VeriSign. The main area is titled 'Edit Instructions' and contains the following fields:

- Chapter 7:** A text box containing the instruction: "For Chapter 7's please be sure to list all of your property and expenses."
- Chapter 13:** A text box containing the instruction: "For Chapter 13's please be sure to list all of your property, expenses and income."
- Certification Language:** A section with a checkbox and text: "Your client must accept certification language before they can submit the questionnaire to you. The default language is provided below but can be edited at anytime. Simply click in the box below and enter the desired text and click 'Save'." Below this is a text box containing a sample certification statement: "I understand that some or all of the information provided herein may be used by my attorney to prepare my case and that all information I am required to provide during my bankruptcy case must be complete, accurate, and truthful."
- Buttons for **Save** and **Back**.

**Edit Client Instructions:** Review default Certification language and create Chapter 7 and Chapter 13 Instructions to share with your clients.

### Edit Default Certification Language

The certification language is what your client agrees to when they submit the online questionnaire to you. The check box must be checked before they can submit the questionnaire.

1. Click **Edit Instructions**.
2. Add or edit specific language that will appear.
3. Click **Save**.

## Billing Information

This section allows you to view basic information about the current credit card on file as well as the ability to update the credit card you want used for MyCaseInfo billing. No more paper billing!

### Update Billing Information

1. Click **Update Billing Information**.
2. Enter updated billing information.
3. Click **Submit**. You will receive a message that the information has been updated.

## Invoices

### View Past Invoices

See past invoices for MyCaseInfo along with detailed information about which client was purchased, by which user and when it was purchased for download. Click the invoice number for full details and to print.

## IX. ENABLE SPANISH VERSION

This feature provides a complete translation of all MyCaseInfo questions, labels, drop-down lists, action buttons, and documents. The questions are written to be easily understood by debtors with no knowledge of the technical language use in the official bankruptcy forms.

### Invite A New Client Using The Spanish- Language Questionnaire

1. From the MyCaseInfo Attorney Administration dashboard.
2. Click **Invite New Client**.
3. Complete the basic-information form fields and click Next.
4. Complete the client-option form fields.
5. From questionnaire Language options choose Spanish.
6. Click **Next**.

**Note** This feature of MyCaseInfo will not convert client responses from Spanish to English.

Instructions/Questionnaire Options

Select the set of instructions to use. [Edit Instructions](#)

You can save separate sets of instructions and send them to users by using the check boxes below. If you have instructions you would like to send to only one client, use the 'Special Instructions' field.

**Instructions**

Chapter 7  
 Chapter 13  
 None

Please select the sections of the questionnaire that you would like your client to complete

**Questionnaire Sections**

Income     Property     Debts  
 Expenses     Miscellaneous  
 Documents

**\*Paycheck Calculator**

Use Paycheck Calculator for this client  
 Don't use Paycheck Calculator for this client  
Means Test income information will not be available if you disable the paycheck calculator.

**\*Questionnaire Language**

English  
 Spanish

\*This feature of MyCaseInfo will not convert client responses from Spanish to English.

Save Options as Default?

← Back
Next →

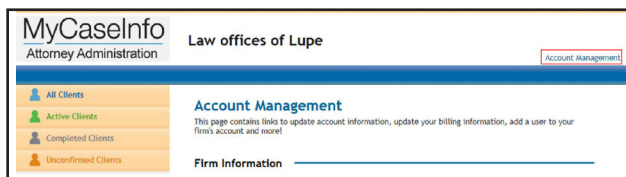
Click 'Next' to continue.

## X. WEBSITE REGISTRATION INTEGRATION

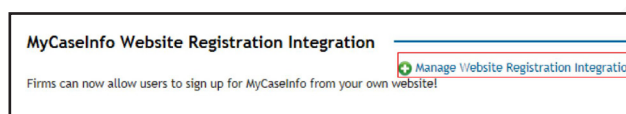
### Integrate MyCaseInfo Registration With Your Website

This segment will help you integrate MyCaseInfo Website registration with your website. This feature of MyCaseInfo requires that your webmaster or other person responsible for your website implement it. We cannot provide technical support for the implementation on your website. We do not have access to your website or to your passwords affiliated with your website and will not make changes to your website.

1. From the dashboard click on Account Management.



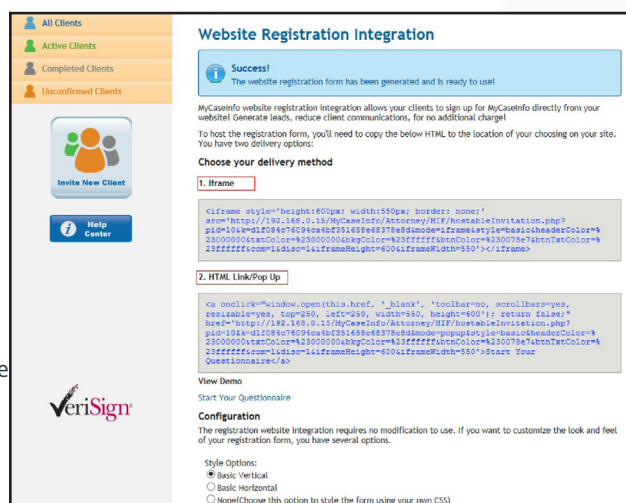
2. Scroll down to “MyCaseInfo Website Registration Integration” click the Manage Website Registration Integration button.



3. Click the Activate button to enable the website registration integration.

4. Configure the Website Registration Integration using the available options.

- IFrame integrates the forms directly into your webpage.
- HTML Link/Pop UP - Customize text to link to a separate form page.



5. Copy the HTML from the delivery method.

6. Paste into your website’s source code.

**Note** Please contact your website administrator to integrate. We recommend creating a test invite and previewing your website page.