

Best Case by STRETTO

MyCaseInfo® Getting Started Guide

A Best Case® Add-on Tool



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WELCOME

Thank you for your interest in MyCaseInfo. When you add this workflow tool to the bankruptcy process, you minimize time-intensive data entry and eliminate the need for paper questionnaires. In this guide, you'll get an overview of the basics of MyCaseInfo and learn how to get started.

With MyCaseInfo, you can:

- Invite a client by email to complete the secure, online questionnaire.
- Customize the questionnaire for each client by including only the information you want them to complete.
- Review the client's progress at anytime and preview the completed questionnaire for accuracy prior to downloading.
- Import data directly into Best Case Bankruptcy.
- Pay only for data you download.

Get started with MyCaseInfo today and get your first download FREE!

WHAT YOUR COLLEAGUES ARE SAYING ABOUT MYCASEINFO

"A great time saver. Fast and efficient. MyCaseInfo allows me to **get the client more involved** in providing answers and seeing how or why items are needed in their case. Also, it lets me preview my clients' answers before purchasing the download...."

– Lawrence W. Lobb, Law Office of Lawrence W. Lobb PC, Geneva, IL

"MyCaseInfo saves me time because all of the basic information is already uploaded into the bankruptcy schedules. This **cuts the number of meetings** and alerts me to any red flags right away."

– Wm. Joe Blass, Law Office of Wm. Joe Blass, Santee, CA

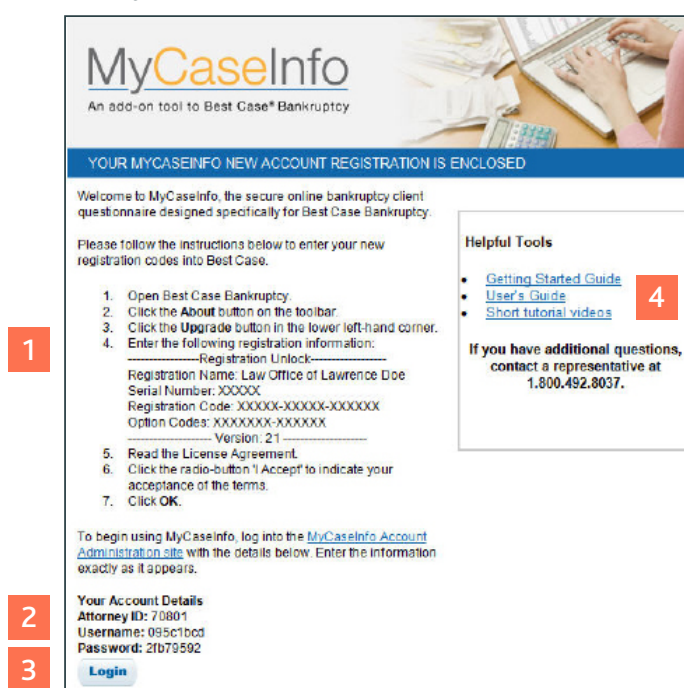
"With MyCaseInfo, I think it actually makes it more understandable [to the client] as to what information we are requesting rather **than the paper document questionnaire.**"

– Rebecca A. Wysong, Baran Piper Tarkowsky Fitzgerald, Lima, OH

UNLOCK BEST CASE BANKRUPTCY

After you sign up for MyCaseInfo follow the instructions on the email or use the steps below:

1. Open Best Case Bankruptcy and close any open windows so you are left with a blank grey screen.
2. Click the **ABOUT** button on the toolbar.
3. Click the **UPGRADE** button in the lower left-hand corner.
4. Enter your registration codes from the email you received with the initial MyCaseInfo signup (enter your codes exactly as they appear in the email).
5. Read and accept the Best Case License Agreement.
6. Click **OK** and restart Best Case Bankruptcy.
7. If you need assistance, call 1.800.492.8037 and ask for technical support.



MyCaseInfo
An add-on tool to Best Case® Bankruptcy

YOUR MYCASEINFO NEW ACCOUNT REGISTRATION IS ENCLOSED

Welcome to MyCaseInfo, the secure online bankruptcy client questionnaire designed specifically for Best Case Bankruptcy.

Please follow the instructions below to enter your new registration codes into Best Case.

1. Open Best Case Bankruptcy
2. Click the **About** button on the toolbar.
3. Click the **Upgrade** button in the lower left-hand corner.
4. Enter the following registration information:

Registration Name: Law Office of Lawrence Doe
 Serial Number: XXXXX
 Registration Code: XXXXX-XXXXX-XXXXXX
 Option Codes: XXXXXXX-XXXXXX
 Version: 21
5. Read the License Agreement.
6. Click the radio-button 'I Accept' to indicate your acceptance of the terms.
7. Click **OK**.

To begin using MyCaseInfo, log into the [MyCaseInfo Account Administration site](#) with the details below. Enter the information exactly as it appears.

Your Account Details
 Attorney ID: 70801
 Username: 095c1bcd
 Password: 2fb79502

Login

Helpful Tools

- [Getting Started Guide](#)
- [User's Guide](#)
- [Short tutorial videos](#)

If you have additional questions, contact a representative at 1.800.492.8037.

1. Your Best Case registration codes.
2. Your MyCaseInfo registration information. **IMPORTANT:** Save this email in your files. It will come in handy if you forget your ID, username or password.
3. Open the MyCaseInfo login page.
4. Links to helpful tools to get you up and running.

LOGIN TO THE MYCASEINFO ATTORNEY ADMINISTRATION SITE

OPTION 1: In Best Case, go to **TOOLS > MYCASEINFO > ATTORNEY HOME PAGE**. You will be brought to a screen that lists attorneys that have a MyCaseInfo account. Click on the name you wish to use to log in as and enter the password.

OPTION 2: Go to <https://www.mycaseinfo.com/login>. Enter your **ID NUMBER**, **USERNAME** and **PASSWORD** then click **LOGIN**.

TIP: If you forget your login information, enter your ID Number and your email address and you will receive an email with a new password.

1. Read and accept the MyCaseInfo License Agreement after you log in.
2. Complete the billing information. The credit card information is stored on a secure website and is used only for processing MyCaseInfo invoices.
3. Click **UPDATE**.

NOTE: Accepting the license and providing billing information is required only the first time a user logs into MyCaseInfo for the firm.

ATTORNEY ADMINISTRATION SITE OVERVIEW

All activity for the firm is accessed through the MyCaseInfo Attorney Administration site. Invite new clients to complete the questionnaire, view client progress, preview client-entered data from the site and more. You can also access billing information, view past invoices and manage user accounts.

MyCaseInfo Attorney Administration

Law Office of Lawrence Doe

580 Davis Street
Suite 100
Evanston, IL 60201

Phone: 800-493-8007
Fax: 847-190-1000
www.bestcase.com

Account Management | Logout

Active Clients

This section includes all of your clients with dig 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: ON - Select Here -

Enter 1 or more characters of a client's name or email.

Searching Clients by:

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

Name	Progress	Status
+Tessa Smith	0% Completed	In Progress
+Janie Jones	0% Completed	Ready to Download
+Sarah Cotton	0% Completed	In Progress
+Ted Thompson	0% Completed	In Progress
+Sally Johnson	0% Completed	In Progress
+Jesse James	50% Completed	In Progress
+Beth Johnson	0% Completed	In Progress

Client Detail View (for Sarah Cotton):

Percent Completed: 0

Personal Information In Progress Date Invited: 06/10/2012
Income In Progress Date Confirmed: 06/10/2012
Property Not Started
Debts In Progress
Expenses Not Started
Miscellaneous Not Started

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

Buttons: Preview, Client Login, Resend

Highlights of the Active Clients page in MyCaseInfo

- Invite a New Client** – Get started using MyCaseInfo by inviting a client to complete the questionnaire following specific instructions you provide.
- Search Field** – Filter a client from the list of names in the Client Table by typing the first few characters in the search box. A drop-down list appears with matches from your search.
- Client Detail View** – Expand and access client details by clicking the color-coded bar in the Client Table: see debtor's progress, edit client information, address client questions, preview the questionnaire and email the client right from the program.
- Help Center** – Access the User's Guide for in-depth answers to how-to questions and link to helpful web tutorials and online seminars.
- Account Management** – Manage passwords and email addresses, add or remove users, select billing options and review invoices.

INVITE A CLIENT

Invite a Client

* Required Fields
Switch to: 3 Step

Step 1 of 3: Basic Information

*Full Name:
*Phone:
*Email:

This email is ready to be sent an invite

Step 2 of 3: Client Options

Income Information

*Expected Completion Date: 05 / 11 / 2015
Current Income Period: 11/2014 thru 04/2015
*Request Tax Return Uploads Since: 2012
*Request Days of Paychecks: 6 Months

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?

Step 3 of 3: Send Questionnaire

*Send Options
☒ CC Attorney Email: CLamlamay@cingroup.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:

1000 Character Limit

[Send](#)

[Back](#)

Now it is easier than ever to invite a new client to use MyCaseInfo!

1. **Email Checker** – MyCaseInfo will now automatically check the email you've entered to verify if the email is acceptable to invite a new client with. Emails can only be used one time on the MyCaseInfo Client site.
2. **Client Options** – Hide or remove certain features of MyCaseInfo that you don't want your client to complete like specific sections of the questionnaire, uploading documents and using the Paycheck Calculator.
3. **Custom Instructions** – Create a standard set of Chapter 7 and Chapter 13 instructions to easily include during the initial client invite.
4. **Special Instructions** – Include special instructions that you only want to give to this particular client.
5. **Send Email Options** – Send the invitation email through MyCaseInfo or your own email program like Outlook, Gmail or Yahoo.

DEBTOR SITE OVERVIEW

The MyCaseInfo Debtor site is used by the client to complete the online questionnaire and correspond with the attorney. It presents the client with simple, clear directions to minimize confusion and utilizes easy-to-understand icons for simple navigation.

The image shows two screenshots of the MyCaseInfo Debtor site. The top screenshot is the 'Debtor Home page in MyCaseInfo'. It features a navigation bar with icons for Personal Information, Income, Property, Debts, Expenses, Miscellaneous, Documents, and Send To Attorney. A sidebar on the left contains links for Ask Attorney, Tools, Help Center, and Contact Attorney. The main content area includes a 'Welcome' message, '3 Tips for Successfully Completing MyCaseInfo', a list of 'Documents you'll need', and a 'Before you Begin...' section with links to 'View Instructions' and 'Watch Video'. The bottom screenshot shows a sample question from the questionnaire: 'Are you employed?'. It includes a 'Question 1 of 16 in Income' header and two radio button options: 'Yes' (marked with a green checkmark) and 'No' (marked with a red X).

1 MyCaseInfo

2 Documents you'll need

3 Ask Attorney

4 Contact Attorney

5 Are you employed?

Debtor Home page in MyCaseInfo

Sample question from MyCaseInfo questionnaire

Highlights of the Debtor Home page in MyCaseInfo

- Clearly Identified Questionnaire Sections** – Only the information that the attorney wants completed are visible and accessible to the client.
- Step-by-Step Instructions** – Clients can easily view, download and print instructions. They are encouraged to watch a short instructional video before they begin the questionnaire.
- Flag, Tools and Help Center** – Grouped for convenience, clients can quickly flag areas to communicate with the attorney, access calculators and calendars in the Tools area and access the Help Center to answer questions throughout the questionnaire.
- Attorney Contact Information** – The attorney's name, address, phone and fax numbers and email address are always visible in the left sidebar.
- Plainly Written Questionnaire** – Simple, easy-to-understand questions help clients complete the questionnaire quickly and accurately.

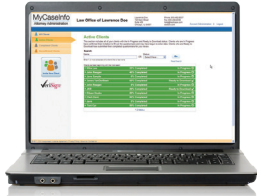
SUPPORT AND SERVICES

A variety of free educational tools and resources, including online training, the Help Center and live, expert telephone support are available to get you up and running quickly.

View Web Tutorials

www.bestcase.com/webtutorials

- Short, pre-recorded demonstrations walk you through tasks necessary for using MyCaseInfo including inviting a client, questionnaire management and account administration.



Register for an Online Seminar

www.bestcase.com/online seminars

- Learn how MyCaseInfo can reduce data entry and help streamline your workflow.



Access the MyCaseInfo Help Center

Click the Help Center button in the left sidebar

Get immediate access to valuable information including:

- **MyCaseInfo User's Guide** – Refer to this detailed document when you need help resolving a problem or seeking an answer to a technical question.
- **Client Questionnaire List** – View all questions by section that are in the Client Questionnaire.
- **FAQ's** – A list of the most frequently asked questions.
- **Web Tutorials** – View pre-recorded online video tutorials at anytime.
- **What's New** – View recent updates and changes to MyCaseInfo.

Contact a Technical Support Representative

- Phone: 800.492.8037
- Email: help@bestcase.com
- Monday – Friday 8:00 am - 5:30 pm CT

Get your questions answered by technical experts.

Technical Support is unable to assist your clients directly or provide legal advice.



BEST PRACTICES

Current MyCaseInfo users share how they use the program.

- **Provide incentives to clients that use MyCaseInfo** – Clients may be more likely to use MyCaseInfo and provide detailed answers when they receive a benefit.
- **Prescreen clients with MyCaseInfo** – Clients that spend time going through the questionnaire are more likely to follow through with the bankruptcy process.
- **Use MyCaseInfo to speed up filing for cases with tight deadlines** – Save processing time and speed up data entry and preparation by having the client enter data directly.
- **Update client data before importing into Best Case** – Login as the client to easily update any last minute data before you purchase and download the file.