

A GUIDE TO YOUR CLIENT PORTAL

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**EVERYTHING YOU NEED TO KNOW
ABOUT YOUR CASE: COMMUNICATE
AND COLLABORATE WITH YOUR
REPRESENTATIVE IN ONE EASY-TO-USE
ONLINE PORTAL!**



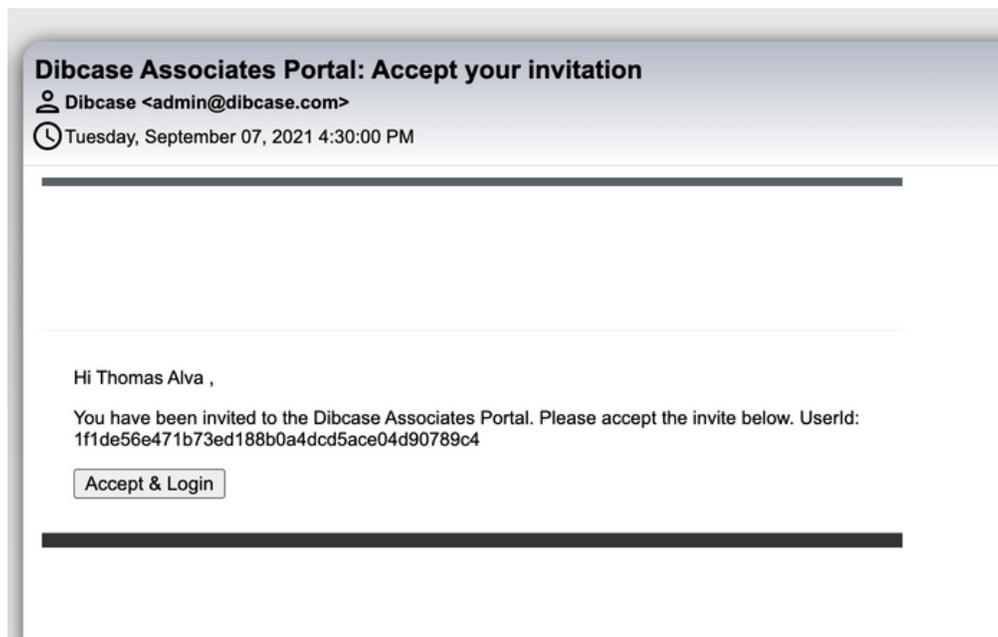
Welcome to the Dibcase client portal...

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

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Activating your Dibcase portal

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

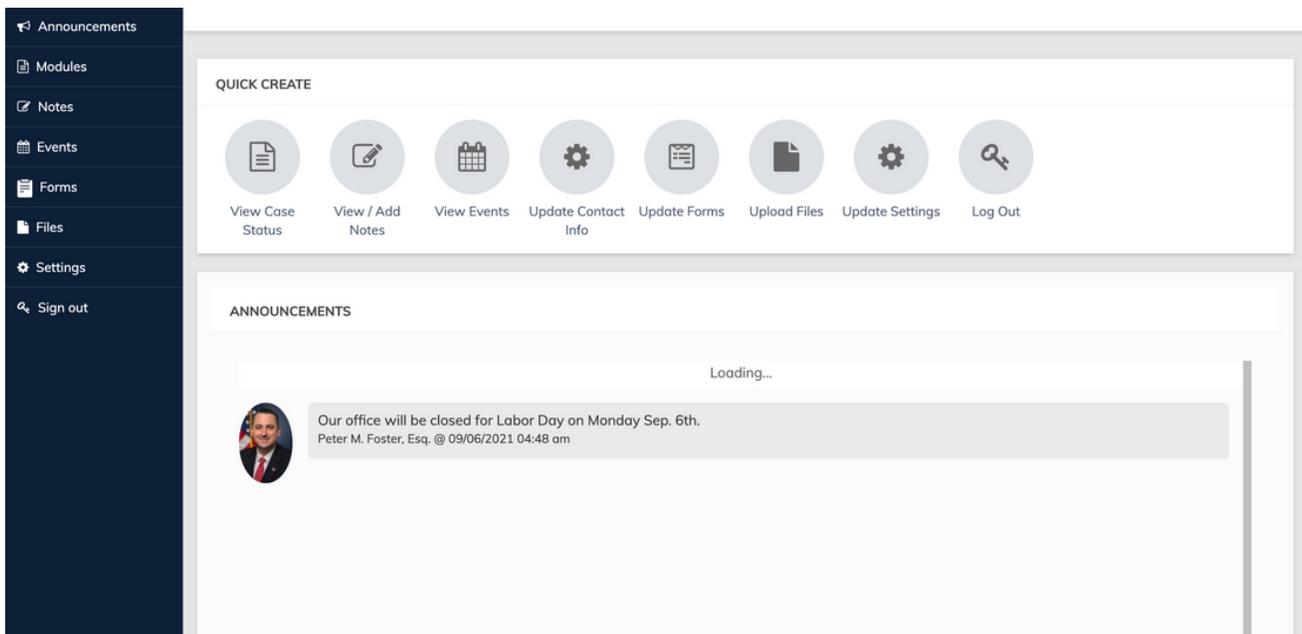


Once you have activated your account, you can access your Client Portal any time by navigating to <https://app.dibcase.com/#/client-portal/login>

Note: Activation Emails will be sent from admin@dibcase.com. If your attorney has sent you an activation email and cannot locate it in your inbox, please be sure to check your Spam filter.

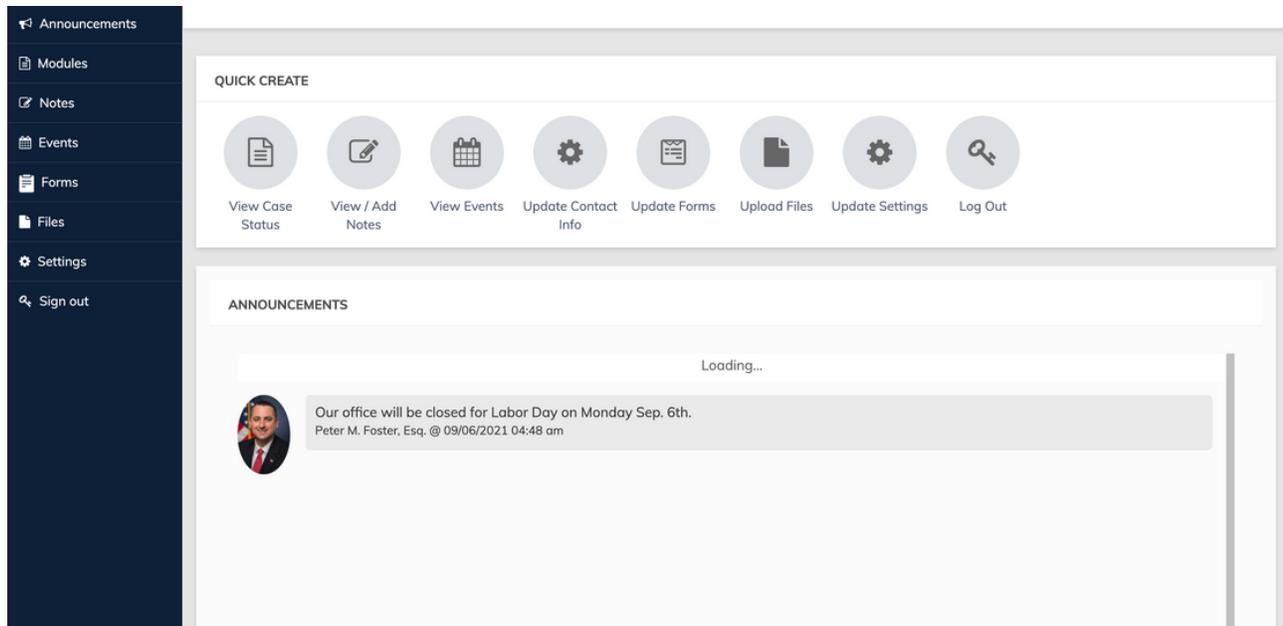
The dashboard

At the top of the dashboard we've conveniently added the "Quick Create" toolbar to make it easy to perform common tasks in your portal. In the rest of this guide, we discuss each option and how to utilize the features.



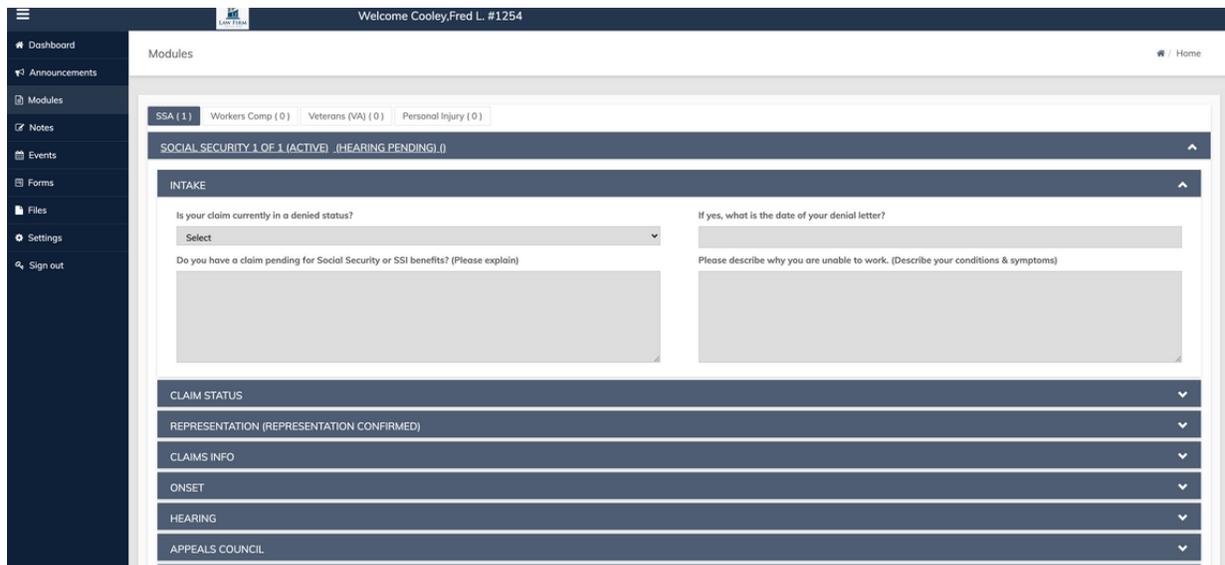
View announcements

The announcements are a read-only platform for your attorney to communicate important information with you.



View my case status

The case status accordions are a read-only platform for your attorney to communicate important information regarding your case. The current status of your case will always appear on the first accordion, and can be viewed under the "CLAIM STATUS" option.



Update medical info

In order to make it easier for you to keep your medical information up to date, we added a self-help medical component to the portal. Here, you can update your medical providers, conditions, and medication details.

The screenshot shows the 'MEDICAL PROVIDERS (1)' section. At the top, there are three tabs: 'MEDICAL CONDITIONS (1)', 'MEDICATIONS (2)', and 'MEDICAL PROVIDERS (1)'. Below the tabs is a search bar labeled 'Search Contacts' with a red arrow pointing to it from the text 'Search our database OR add a new provider'. To the right of the search bar is a button labeled 'Add Medical Provider'. Below the search bar is a list of providers, with the first one being '1. TALLAHASSEE EAR NOSE AND THROAT SPECIALISTS | PHONE (850) 877-0101 | FAX'. To the right of the list is a 'Submit Medical Provider' button.

Add new medical providers

The screenshot shows the 'Add new medical providers' form. At the top, there is a header with the text '1. TALLAHASSEE EAR NOSE AND THROAT SPECIALISTS | PHONE (850) 877-0101 | FAX'. Below the header are several input fields: 'Name' (Tallahassee Ear Nose and Throat Specialists), 'Organization', 'Address 1' (1405 Centerville Road), 'Address 2' (#5400), 'City' (Tallahassee), 'State' (FL), 'Zip code' (32308), 'Phone' ((850) 877-0101), 'Fax', and 'Email'. There are also fields for 'First Visit', 'Last Visit', and 'Next Scheduled Appt.'. Below these are sections for 'Medical Conditions Treated', 'Treatment Received', and 'Medications Prescribed'. At the bottom, there is a 'Notes' field with the text 'Test' and a 'Last edited: 06/08/2022 by James E. Allen' timestamp. A 'Submit Medical Provider' button is located at the bottom right.

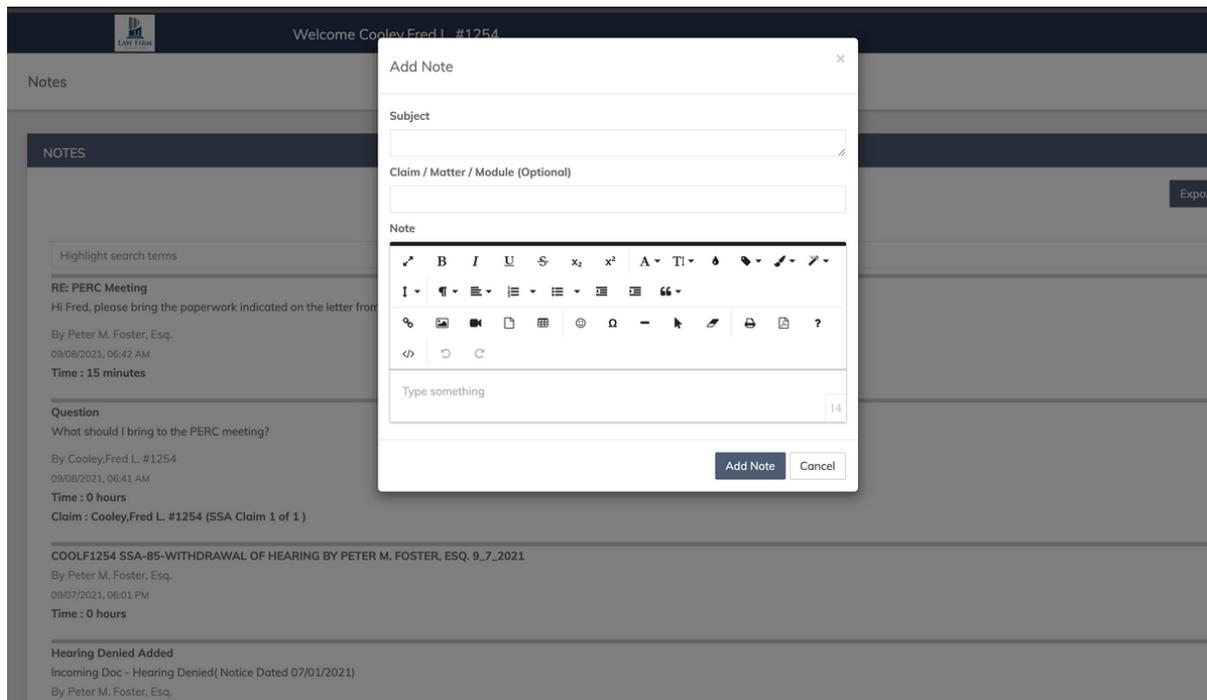
Add new conditions and medications

The screenshot shows the 'Add new conditions and medications' form. At the top, there is a header with the text 'COPD'. Below the header are several input fields: 'Medical Condition', 'Date Diagnosed', 'Notes', and 'Treated By'. The 'Treated By' field has a red warning message: 'Add provider first before adding new conditions'. Below the 'Treated By' field is a dropdown menu with the text 'Tallahassee Ear Nose and Throat Specialists'. A 'Submit Medical Condition' button is located at the bottom right.

View or add a note

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

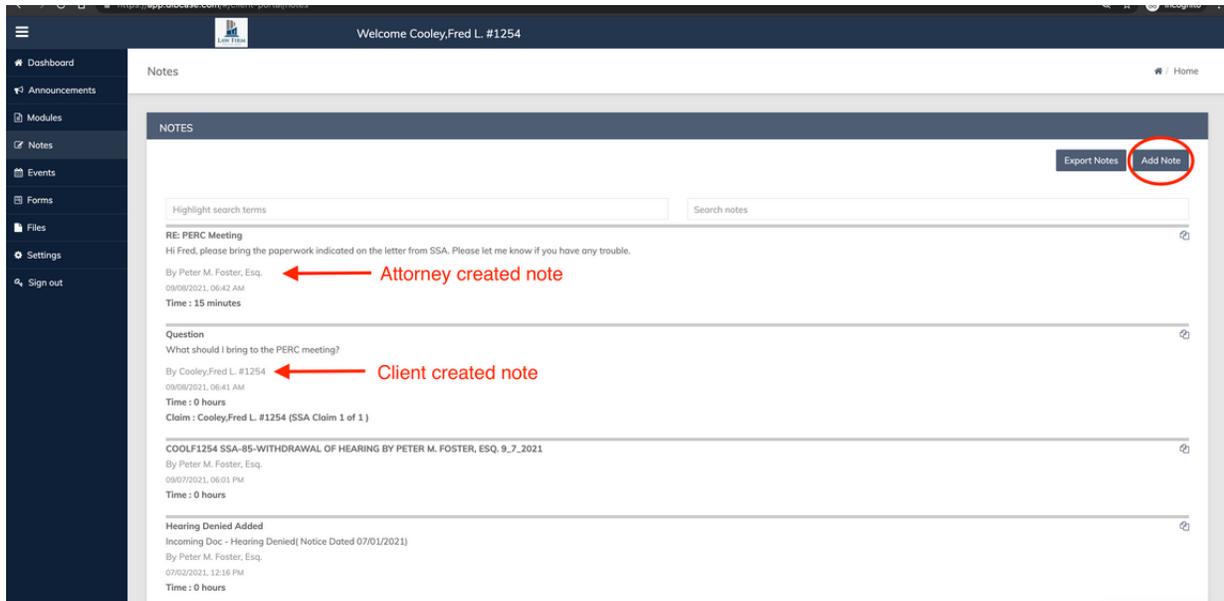
To do so, click on the "Add Note" button and you will be taken to the "Add Note" Window (pictured below)



To create your note, you must add a subject and optionally associate your note with a matter or claim. Once you complete the body of the note, you are ready press the "Add Note" button. Once your note is added, it will be added to your case for your representative or case manager to see.

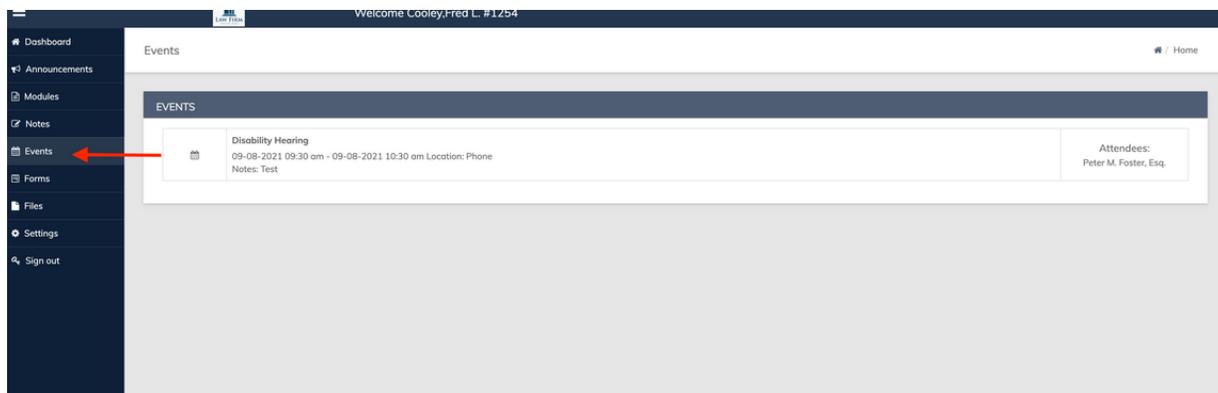
Note: You can upload documents in the "Files" tab.

Continued...



View upcoming events

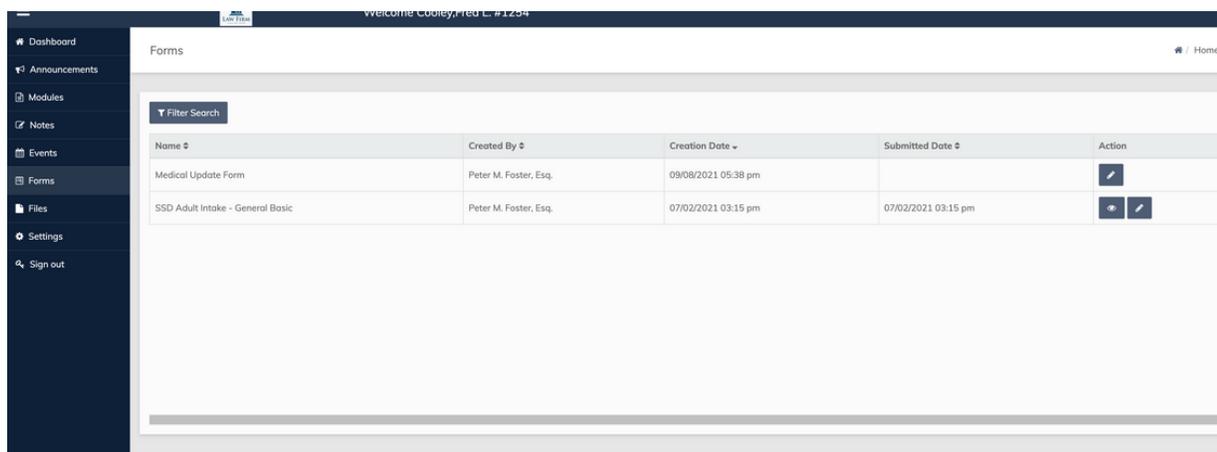
When your attorney adds an event or appointment to your case, it will appear on the "Events" page. This panel will show you the date, time, and attendees for your event.



Complete Forms

Your client portal includes forms that your attorney may add to your case. These forms can be submitted securely in your portal. Some forms can be updated and resubmitted as necessary.

To edit a form, select the "Pencil" icon on the right of the form. Fill in the necessary information and submit the form. Your attorney will be notified once you submit your form.



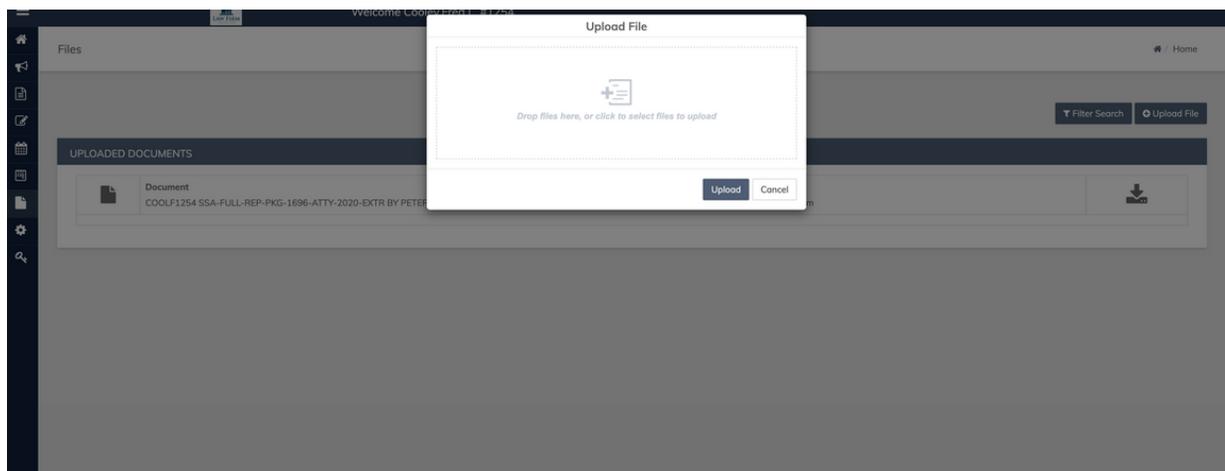
The screenshot displays the 'Forms' section of a client portal. A dark sidebar on the left contains navigation options: Dashboard, Announcements, Modules, Notes, Events, Forms (highlighted), Files, Settings, and Sign out. The main content area shows a table of forms. At the top right of the main area, it says 'welcome Cooley, Fred L. #1294' and 'Home'. Below the table is a 'Filter Search' button.

Name	Created By	Creation Date	Submitted Date	Action
Medical Update Form	Peter M. Foster, Esq.	09/08/2021 05:38 pm		
SSD Adult Intake - General Basic	Peter M. Foster, Esq.	07/02/2021 03:15 pm	07/02/2021 03:15 pm	

Upload 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 File” button in your in the "Files" tab. You will be taken to the Add Document Window (pictured below). From there, you can add any document saved on your device that needs to be submitted to your attorney.



Change my contact information

You can change your address, add a phone number, or add an email address by going to the "Settings" tab. Once you have keyed in your updated information, press the "Update" button to submit your contact information to your attorney.

The screenshot shows a web application interface. At the top, a dark blue header contains a hamburger menu icon, a logo with the text 'LAW FIRM', and a welcome message: 'Welcome Cooley, Fred L. #1254'. On the left, a dark blue sidebar lists navigation options: Dashboard, Announcements, Modules, Notes, Events, Forms, Files, Settings (highlighted), and Sign out. The main content area is titled 'Settings' and features three tabs: 'Contact Settings' (active), 'Portal Settings', and 'Notifications'. Below the tabs, the 'Contact Settings' form includes the following fields: 'Address 1' (text input with '123 Smith Street'), 'Address 2' (text input with 'Address 2'), 'City' (text input with 'Phoenix'), 'State' (dropdown menu with 'AZ' selected), 'Zip' (text input with '85306'), 'Email' (text input with 'Email'), and 'Phone' (text input with '(623) 695-4767'). An 'Update' button is located at the bottom of the form.

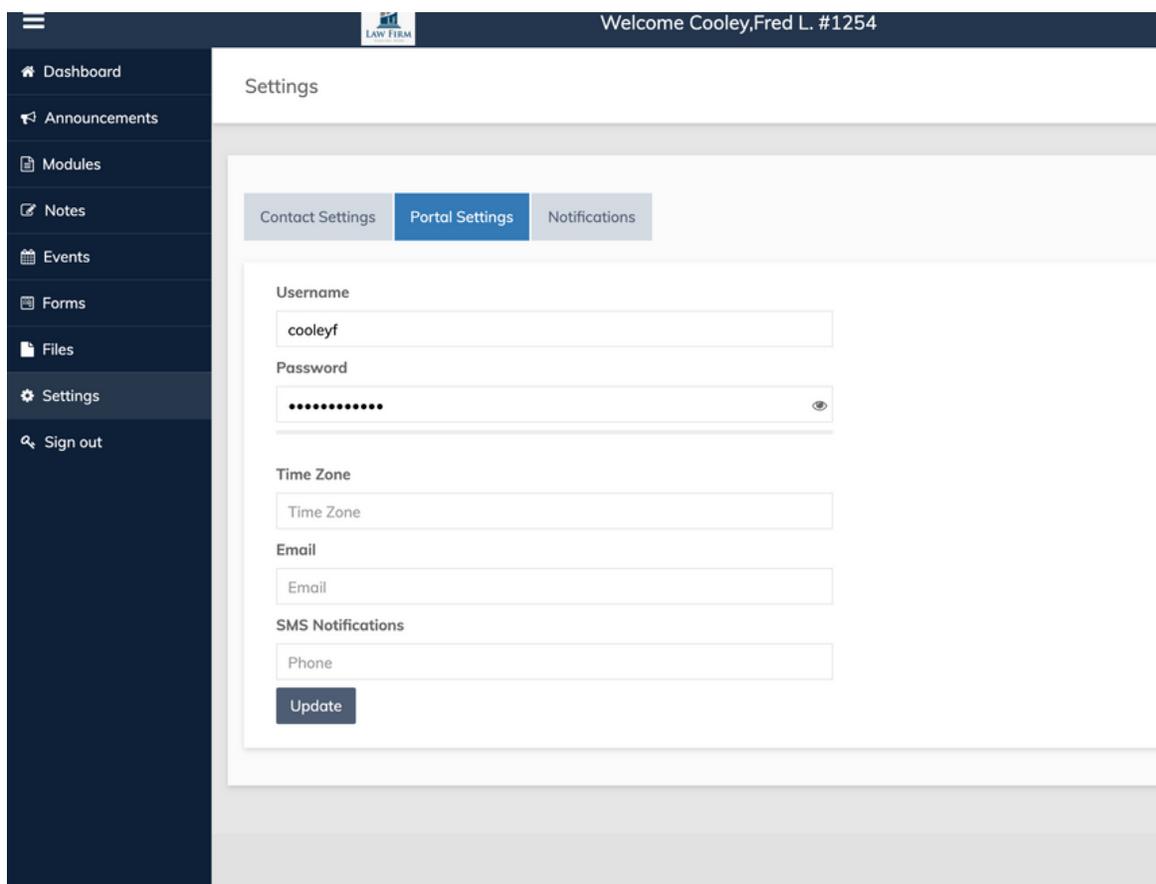
Set your portal preferences

When changes are made to your Client Portal, you will be notified by email and/or text. You can change the type of notifications you wish to receive by going to the "Settings" tab, then the "Notifications" window. Select the check box for each option you want to be notified for the press "Update". (See example below)

The screenshot shows the 'Settings' page in a client portal. The top navigation bar includes a logo, the text 'LAW FIRM', and a welcome message 'Welcome Cooley, Fred L. #1254'. A dark sidebar on the left contains navigation links: Dashboard, Announcements, Modules, Notes, Events, Forms, Files, Settings (highlighted), and Sign out. The main content area is titled 'Settings' and has three tabs: 'Contact Settings', 'Portal Settings', and 'Notifications' (which is active). Under the 'Notifications' tab, there are two columns of notification options. The left column is titled 'Send an email notification when:' and the right column is titled 'Send an SMS notification when:'. Each column contains five identical options, each with an unchecked checkbox: 'Someone sends me a announcement', 'A note is shared with me', 'An event is added', 'A form is assigned or submitted', and 'A file is shared with me'. A blue 'Update' button is located at the bottom of the notification settings area.

Change my password and other settings

In the "Settings" tab under "Portal Settings" you can change your password, update your email, and the phone number you wish to receive notifications on. Remember to press the "Update" button once you have keyed in your needed information.



The screenshot shows a web application interface for a law firm. At the top, a dark blue header contains a logo on the left, the text "Welcome Cooley, Fred L. #1254" in the center, and a small "LAW FIRM" logo on the right. A dark blue sidebar on the left lists navigation options: Dashboard, Announcements, Modules, Notes, Events, Forms, Files, Settings (highlighted), and Sign out. The main content area is titled "Settings" and features three tabs: "Contact Settings", "Portal Settings" (selected), and "Notifications". Under the "Portal Settings" tab, there are several input fields: "Username" (containing "cooleyf"), "Password" (masked with dots and a toggle icon), "Time Zone" (containing "Time Zone"), "Email" (containing "Email"), and "SMS Notifications" (containing "Phone"). A dark blue "Update" button is located at the bottom of the form.