

# STAFF GUIDE TO THE DIBCASE CLIENT PORTAL

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# Welcome to the Dibcase client portal...

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

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# Benefits of the Dibcase client portal

## 24/7 access to case information

The Dibcase client portal is a client-attorney communication app that enables clients to work with their attorney from anywhere.



### AVAILABLE 24/7 ON PC, MAC, TABLETS, AND SMART PHONES

Clients can check the status of their cases, view announcements, add notes, and more from anywhere at anytime. This will eliminate unnecessary back-and-forth communication.

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### COMPLETELY INTEGRATED WITH DIBCASE

There are no 3rd party integrations or expensive addons to use the portal. No manual entry is needed to the portal to keeps clients up to date. You simply update Dibcase as usual and it seamlessly flows into the portal.

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### DOCUMENT SCANNING AND UPLOADING

Documents can be uploaded from other apps (e.g. Mail, Dropbox), or from a device's camera roll. You can share documents with clients by simply attaching them to notes or manually uploading them.

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### LOG CLIENT COMMUNICATION EFFICIENTLY

You are in control of what is shared with clients. Clients can respond via the notes process which is automatically logged and can be assigned a billable time value.

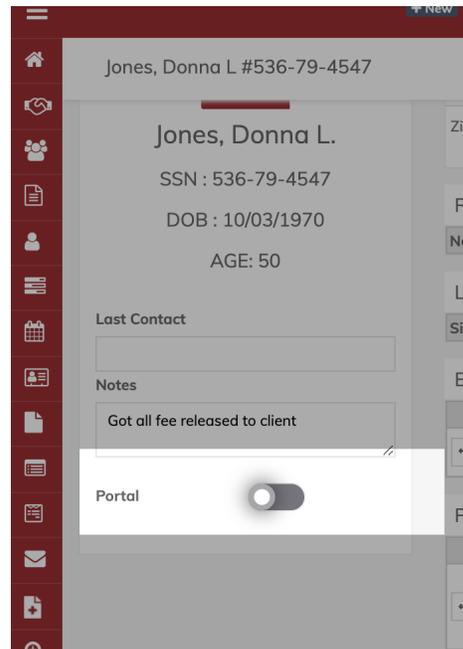
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# Activating the Dibcase portal

## Step 1:

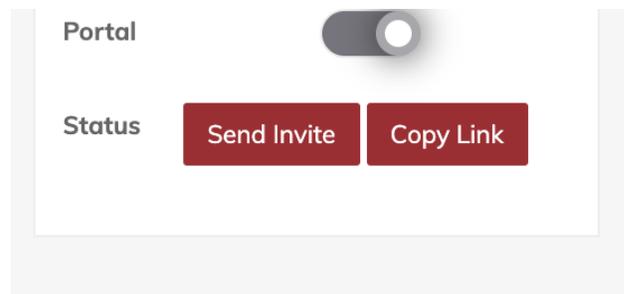
Navigate to the client edit page and enable the portal

Note: The portal can be toggled on or off for any client.



## Step 2:

Click the Send Invite button to send an email invitation for the client to create a portal account.

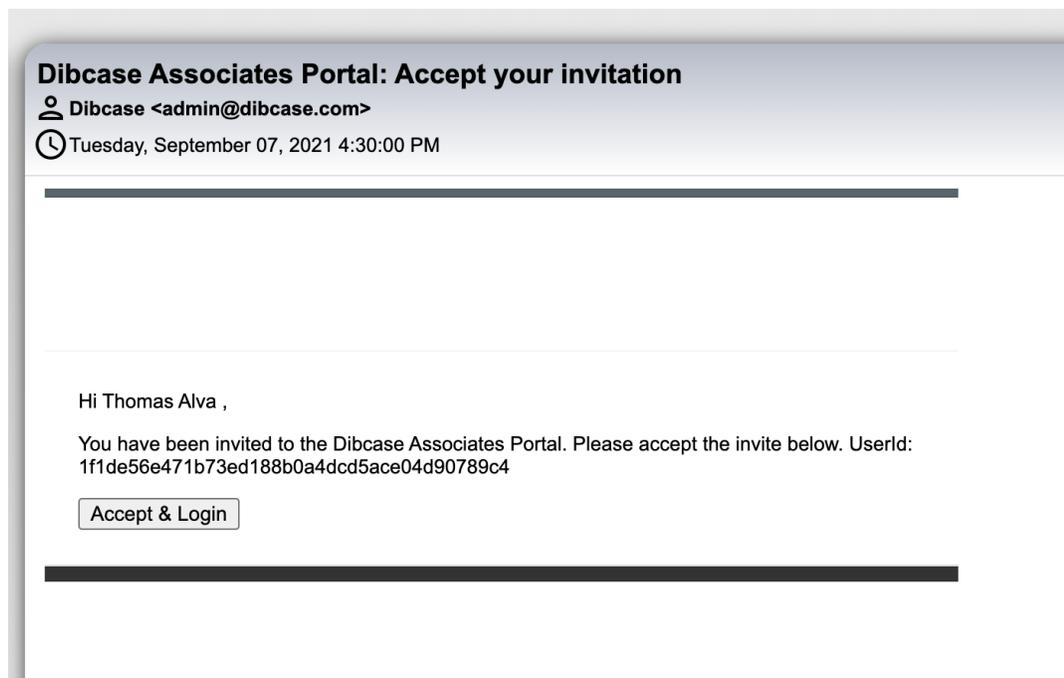


Alternatively, you can copy the signup link and create the account for the client or send it via SMS.

Note: Email account required

## Continued...

Sample invitation email (below)



Once your client has activated their account, they can access their Client Portal any time by navigating to <https://app.dibase.com/#/client-portal/login>

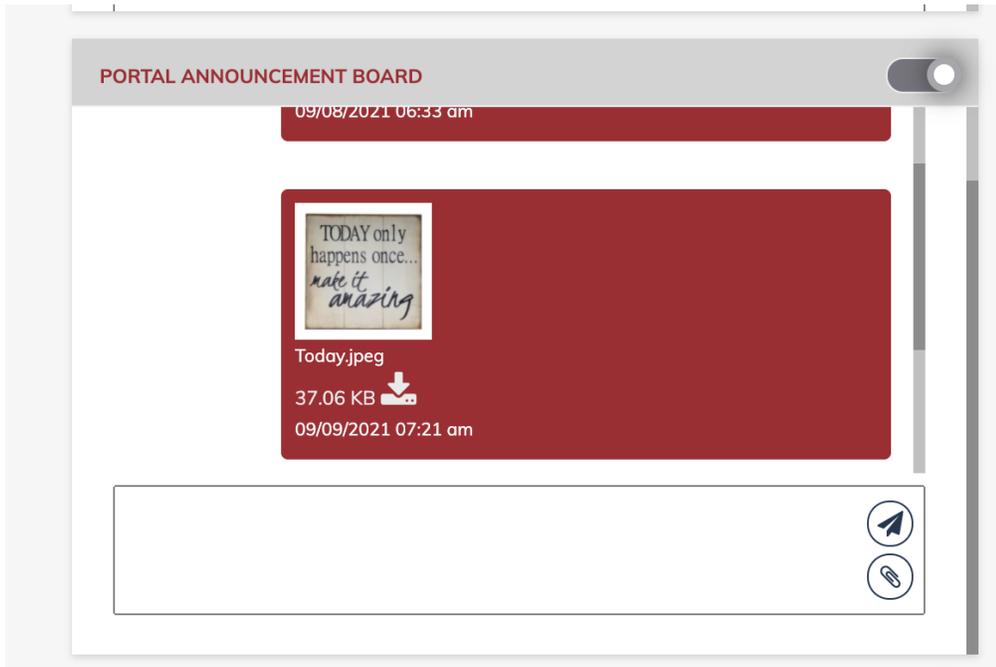
Note: Activation emails will be sent from admin@dibase.com. If you have sent your client an activation email and they cannot locate it in their inbox, please be sure to have them check their Spam filter.

## Creating announcements

In lieu of email, admin employees can create and share announcements that will appear in all portals. You can share images and other multimedia files or links.

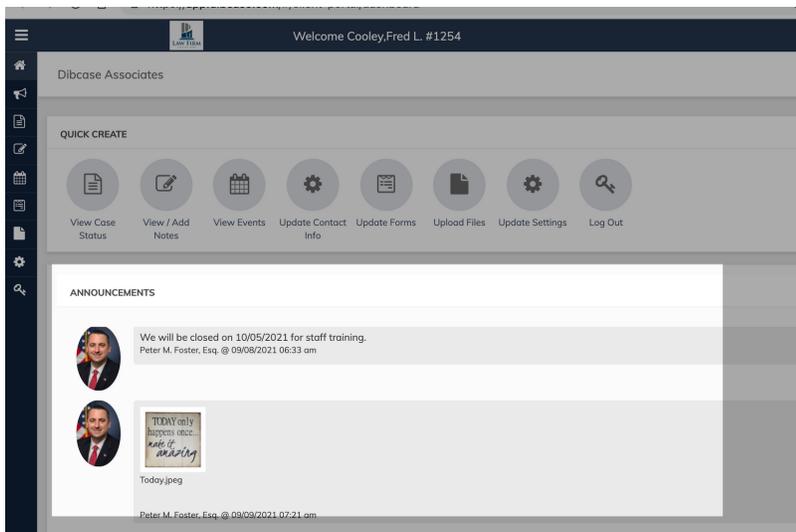
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Dibcase dashboard "Portal Announcement Board" panel (below)



Clients will be able to see any announcements that your firm makes when they login to their portal.

Portal view of announcements (below)



# Sharing notes

Sharing notes is a key feature of the Dibcase client portal. During the normal course of business such as making calls, processing mail, checking statuses, case review etc., you can optionally share those notes with the clients in their portal. You can also go back retroactively and edit notes and check the "Share in portal" checkbox. You don't have to worry about inadvertently sharing notes as the default option is to not share in the portal.

Client edit page notes tab (below)

Cooley, Fred L #111-11-1254

Claims PII **Notes** Tasks Ledger Misc Events Forms Files

General Notes Email Development Notes

Total Billing: 1 hours 45 minutes

Subject Claim/Matter

Type something

This is a contact with the client  Share in client portal **Share in portal checkbox**

Drop files here, or click to select files to upload

**Upload documents to share with client**

Add Note

CLIENT NOTES **Export Notes**

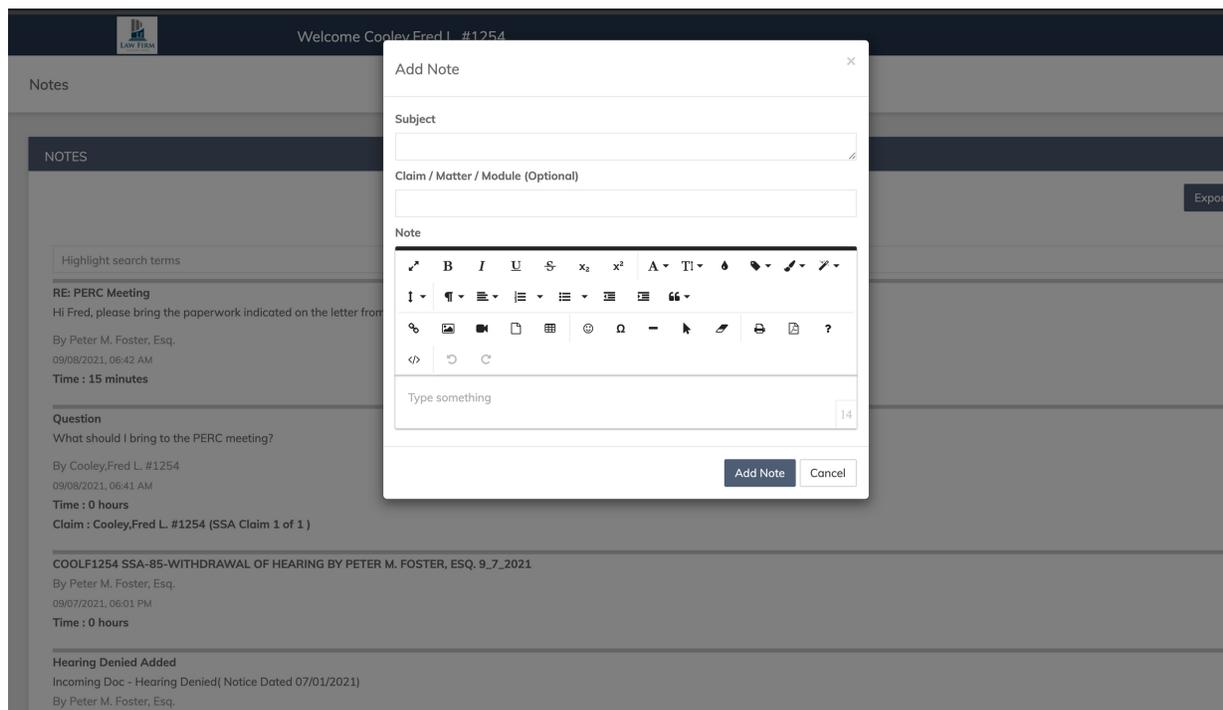
Highlight search terms Search notes

RE: Medical Records Dr. Jones  
We got the records and will be uploading them today **Staff notes and client notes appear in feed**

# How clients share notes

Instead of sending an email or calling your office, clients can send secure messages from the Client Portal.

To do so, they click on the “Add Note” button and it will open the "Add Note" Window (pictured below)

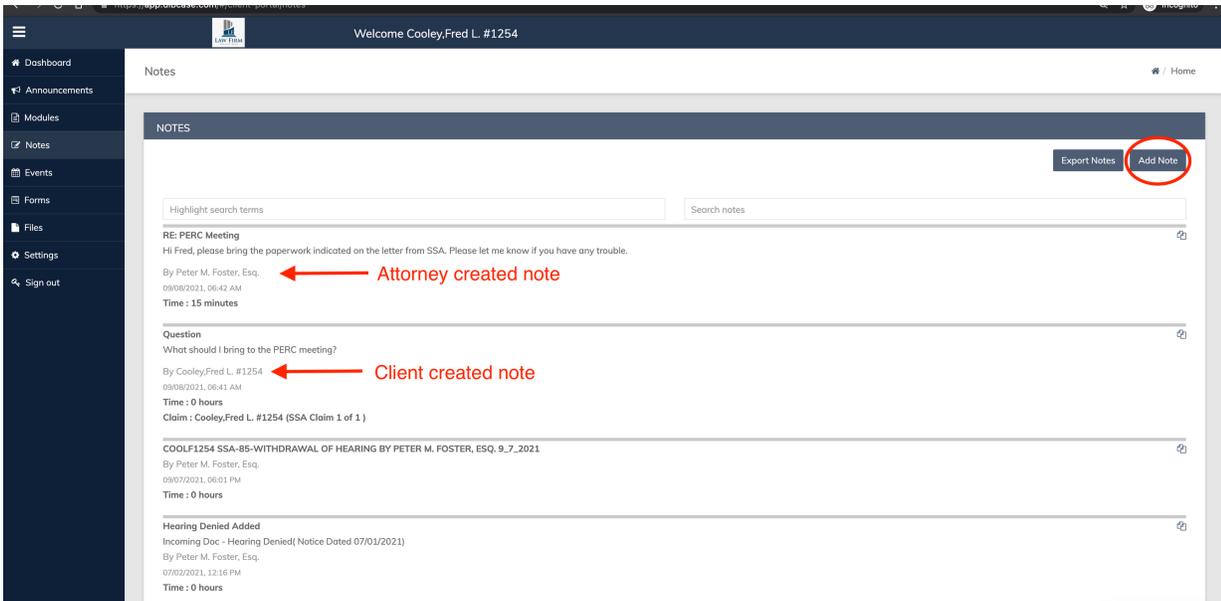


## Notifications

When a client creates and adds a note to their portal, the note will appear on the dashboard "Recent Activities" feed and on the client edit page.

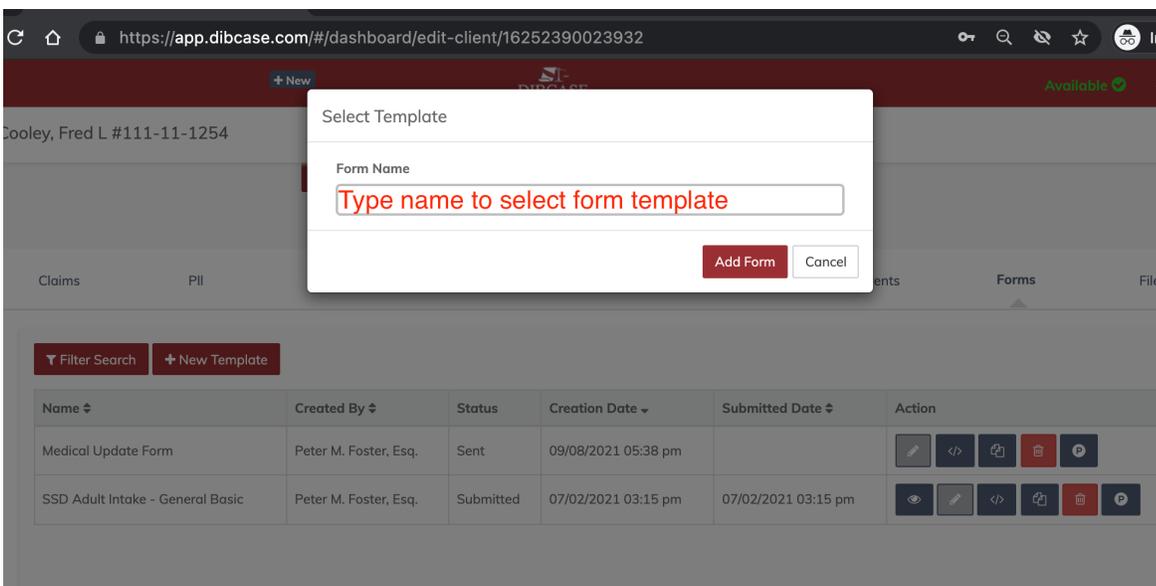
Tip: You can export all the day's recent activities from the dashboard and filter for client notes and respond accordingly.

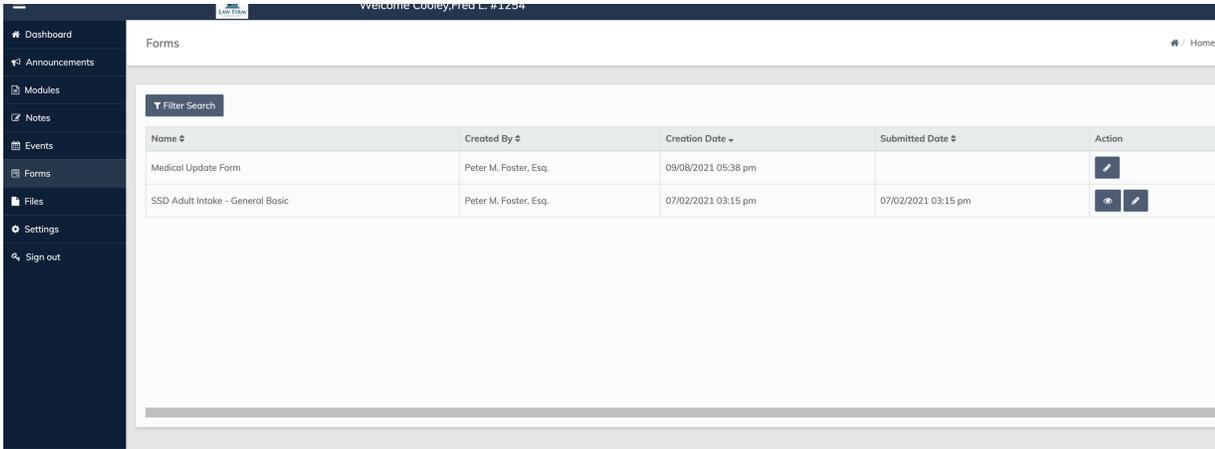
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You can retroactively share notes by editing them and checking the "Share in portal" option.

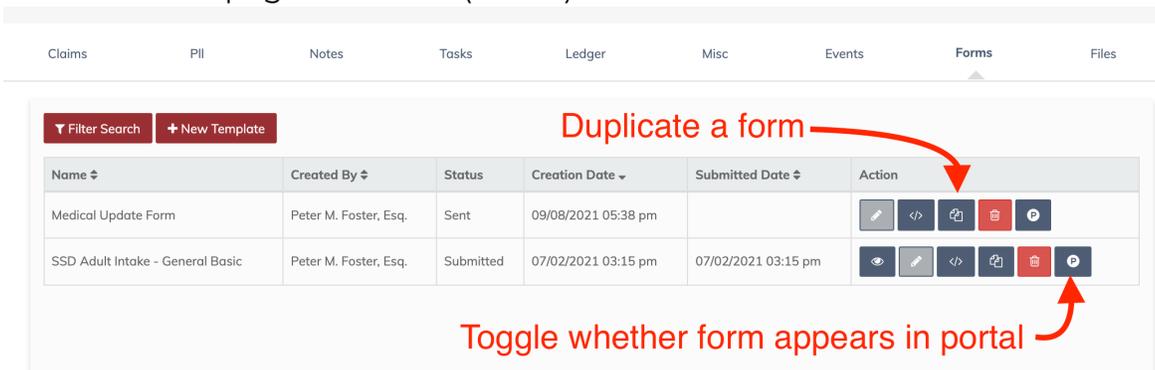
# Sharing forms





Once a form template has been added to the client, you can email, sms, or complete the form yourself. Forms can be partially completed and submitted to be completed at a later time. To stop further editing of a form, simply toggle off the form. Once toggled off, the completed form will not appear in the portal.

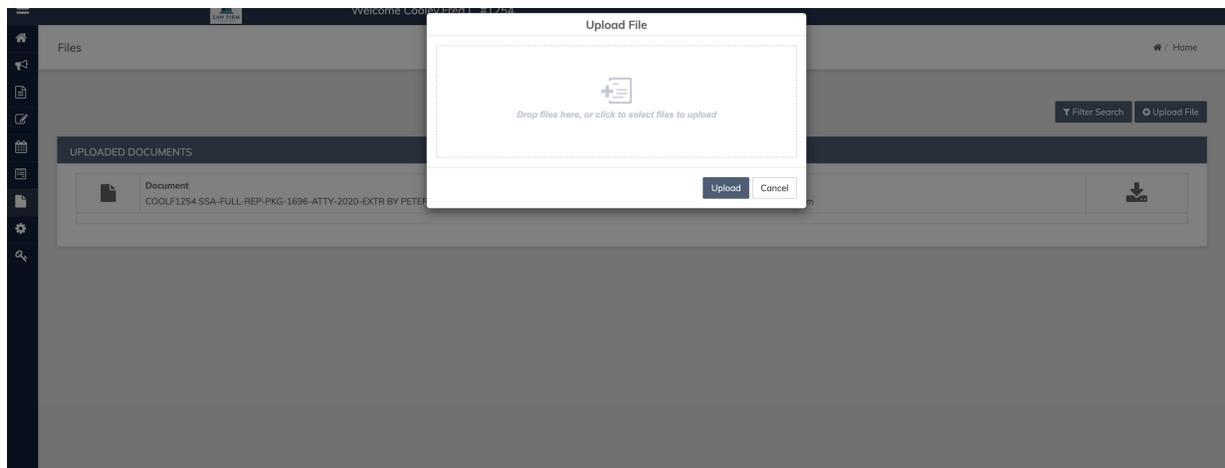
The client edit page forms tab (below)



# Sharing and uploading documents

Instead of using email or traditional mail to send documents, you can upload documents to share into the Client Portal. This way, your clients can have instant, secure access to the necessary documents they need to work on your case.

To do so, click on the “Upload Document” button in your Client Portal. You will be taken to the Add Document Window (pictured below):



# Client contact information

Settings

Contact Settings Portal Settings Notifications

Address 1  
123 Smith Street

Address 2  
Address 2

City Phoenix State AZ Zip 85306

Email  
Email

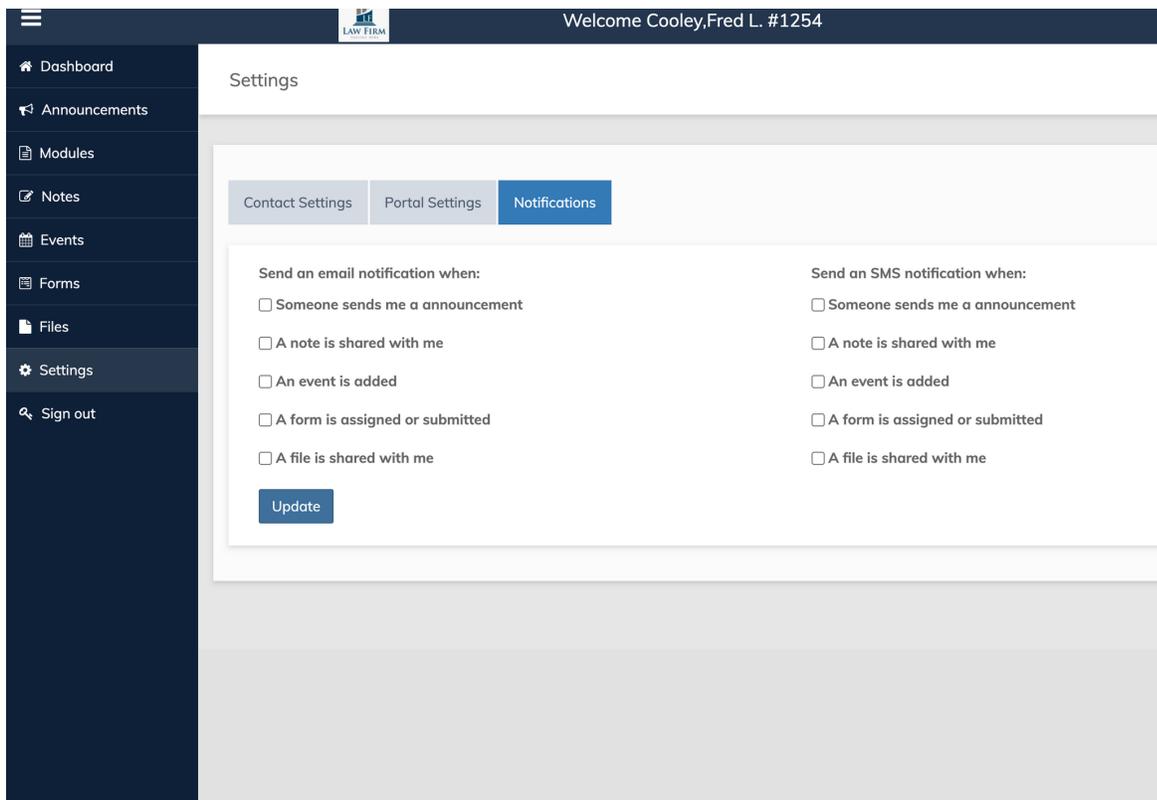
Phone  
(623) 695-4767

Update

Clients have the ability to change their address, add a phone number, or add an email address. When a client adds new email addresses and phone numbers, they will appear in Dibase as new values.

# Setting portal preferences

Clients have the ability to toggle on or off specifically what changes in their portal they will be notified about.



The screenshot shows a web interface for a law firm's client portal. At the top, a dark blue header contains a logo, the text "Welcome Cooley, Fred L. #1254", and a hamburger menu icon. 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", and "Notifications" (which is active). Under the "Notifications" tab, there are two columns of notification preferences. 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 checkboxes for the following events: "Someone sends me an announcement", "A note is shared with me", "An event is added", "A form is assigned or submitted", and "A file is shared with me". All checkboxes are currently unchecked. A blue "Update" button is located at the bottom left of the notification settings area.

# Change portal passwords and other settings

If your client forgets their username or password, you can log in to their page through the client edit page to verify their username or reset their password manually.

Click the "Open" button and navigate to the "Settings" page to edit the client password and confirm user name.

