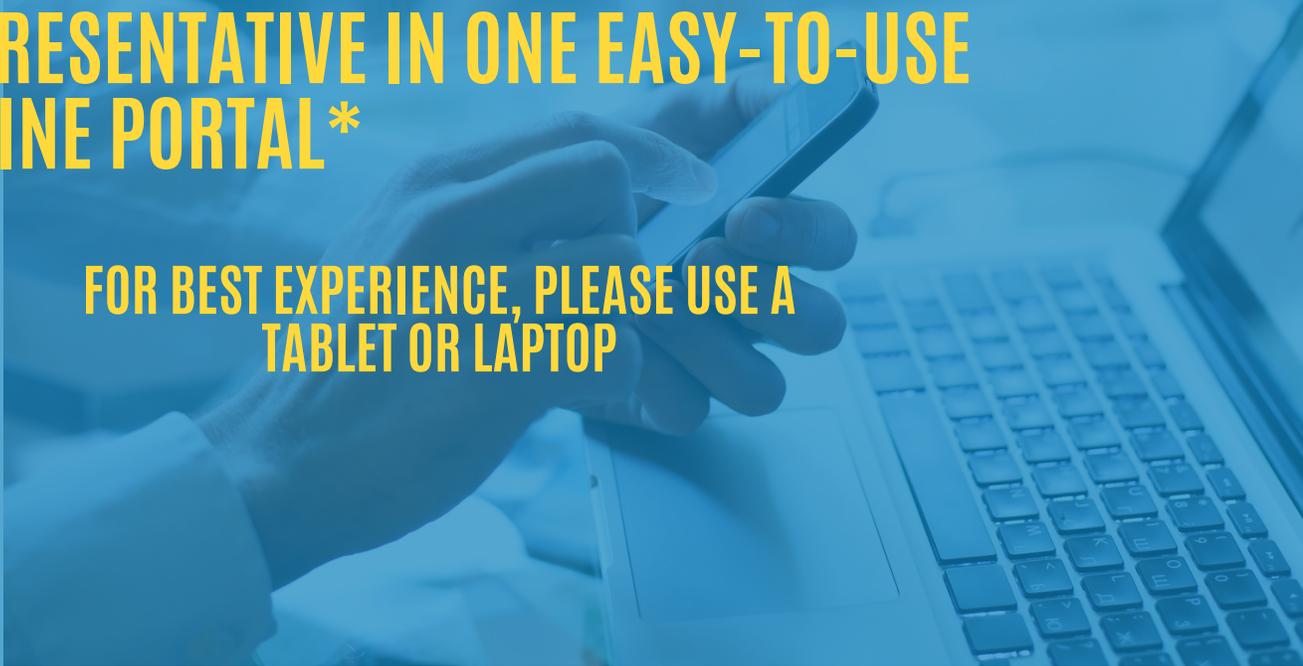


# A GUIDE TO YOUR CLIENT PORTAL

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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\***

**FOR BEST EXPERIENCE, PLEASE USE A  
TABLET OR LAPTOP**



# 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.

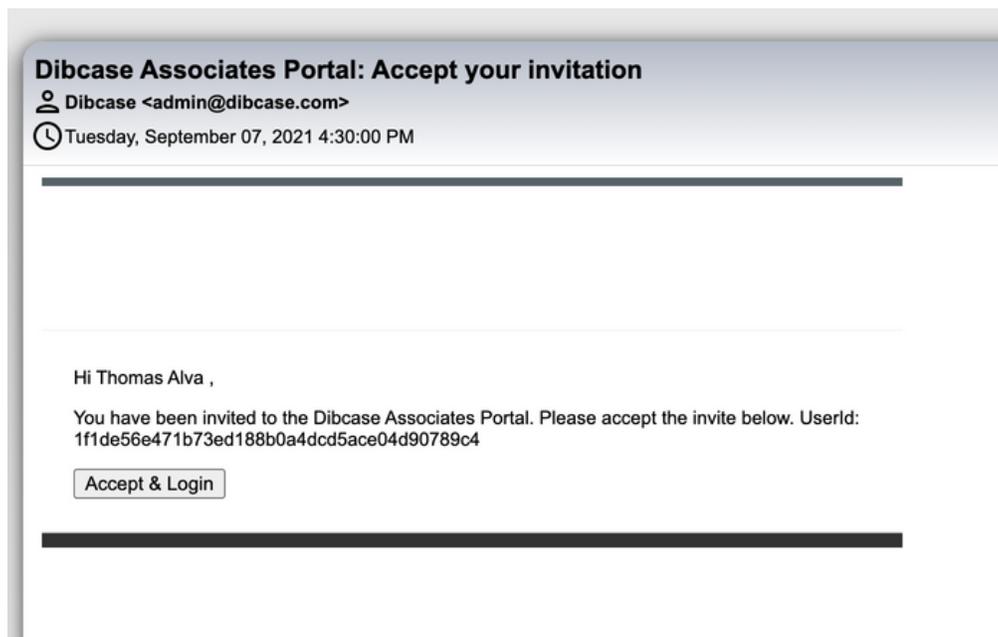
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# Activating your Dibcase portal

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.

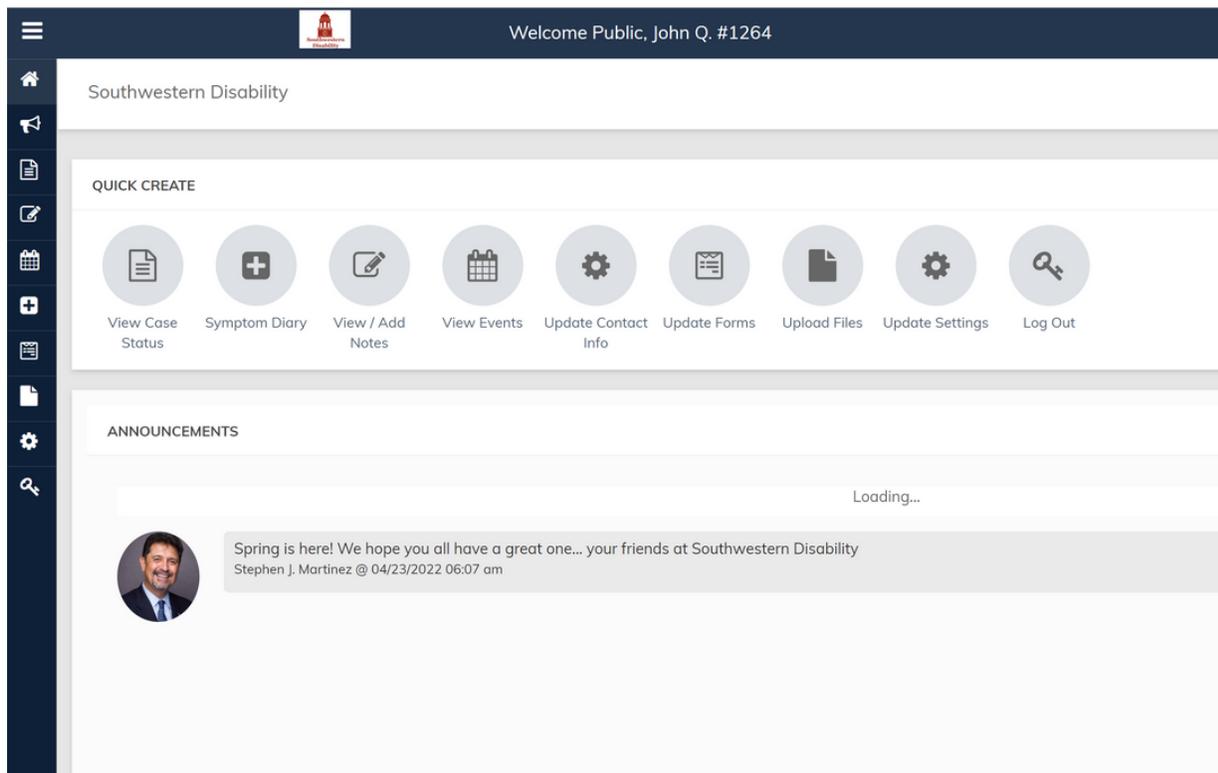


Once you have activated your account, you can access your Client Portal any time by navigating to <https://app.dibcase.com/#/client-portal/login>

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.



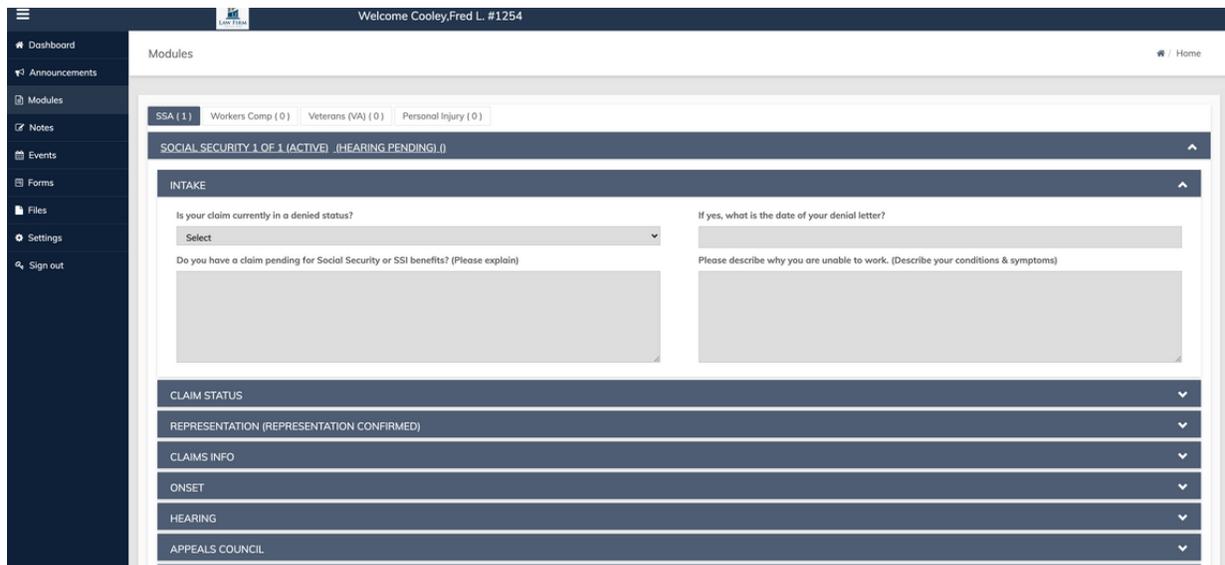
# View announcements

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

The screenshot displays a user interface for 'Southwestern Disability'. At the top, a dark blue header contains a hamburger menu icon, a logo, and the text 'Welcome Public, John Q. #1264'. Below the header, the page title 'Southwestern Disability' is shown. A 'QUICK CREATE' section features nine circular icons with labels: 'View Case Status', 'Symptom Diary', 'View / Add Notes', 'View Events', 'Update Contact Info', 'Update Forms', 'Upload Files', 'Update Settings', and 'Log Out'. The 'ANNOUNCEMENTS' section is currently displaying a 'Loading...' message. Below this, a message from Stephen J. Martinez is visible, dated 04/23/2022 at 06:07 am, with the text: 'Spring is here! We hope you all have a great one... your friends at Southwestern Disability'.

# 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 you medical providers, conditions, tests, procedures and medication details.

CONTRACTS (0)

MEDICAL CONDITIONS (1)

MEDICATIONS (2)

MEDICAL PROVIDERS (1)

Search Contacts  Search our database OR add a new provider

1. TALLAHASSEE EAR NOSE AND THROAT SPECIALISTS | PHONE (850) 877-0101 | FAX

## Add new medical providers

1. TALLAHASSEE EAR NOSE AND THROAT SPECIALISTS | PHONE (850) 877-0101 | FAX

Name  First Visit  Last Visit  Next Scheduled Appt.

Organization

Address 1  Address 2

City  State  Zip code

Phone  Fax  Email

Notes

Last edited: 06/08/2022 by James E. Allen

## Add new conditions and medications

COPD

Medical Condition

Date Diagnosed

Notes

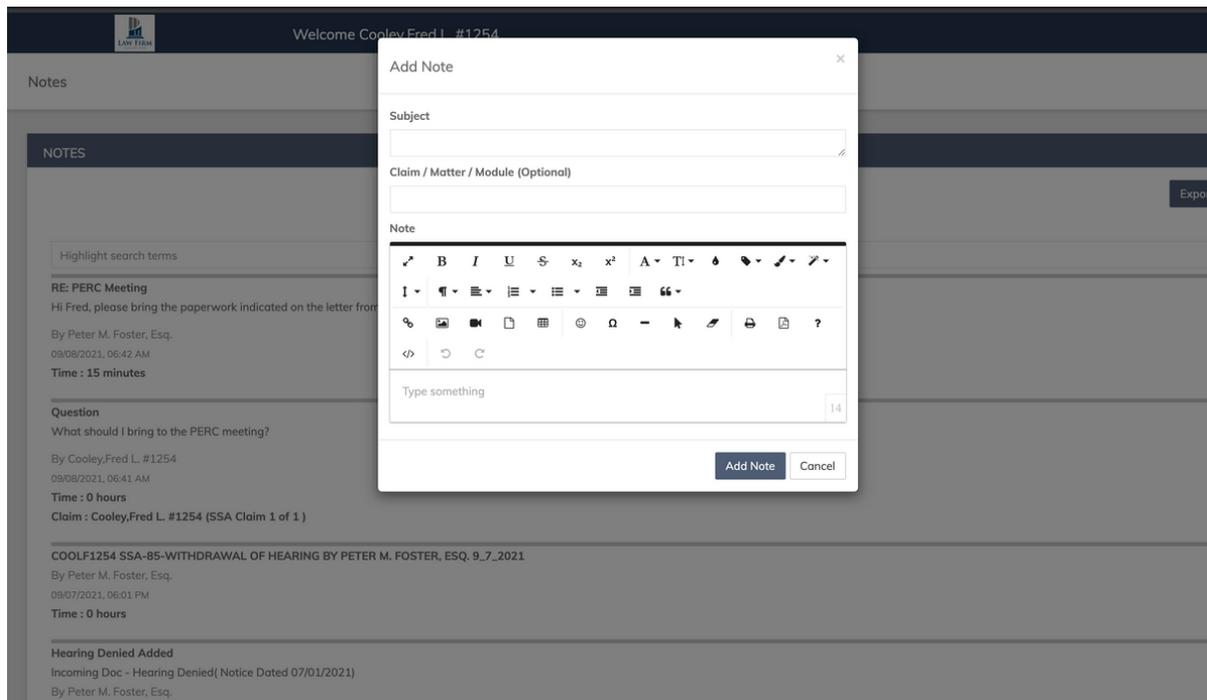
Treated By

Tallahassee Ear Nose and Throat Specialists

# 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.

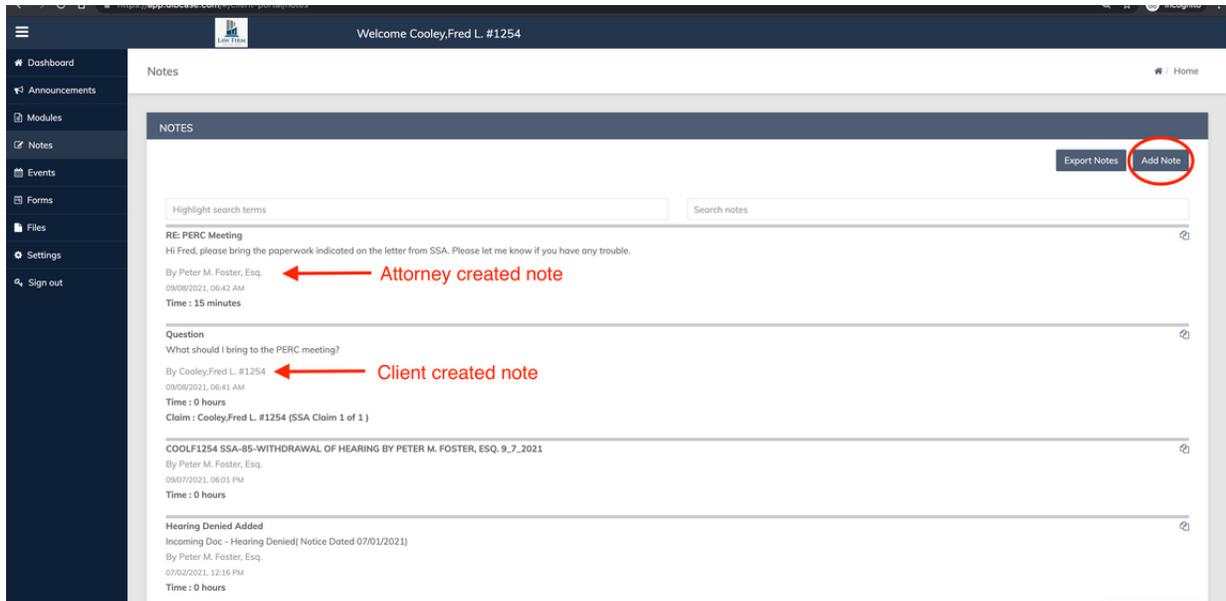
To do so, click on the "Add Note" button and you will be taken to the "Add Note" Window (pictured below)



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.

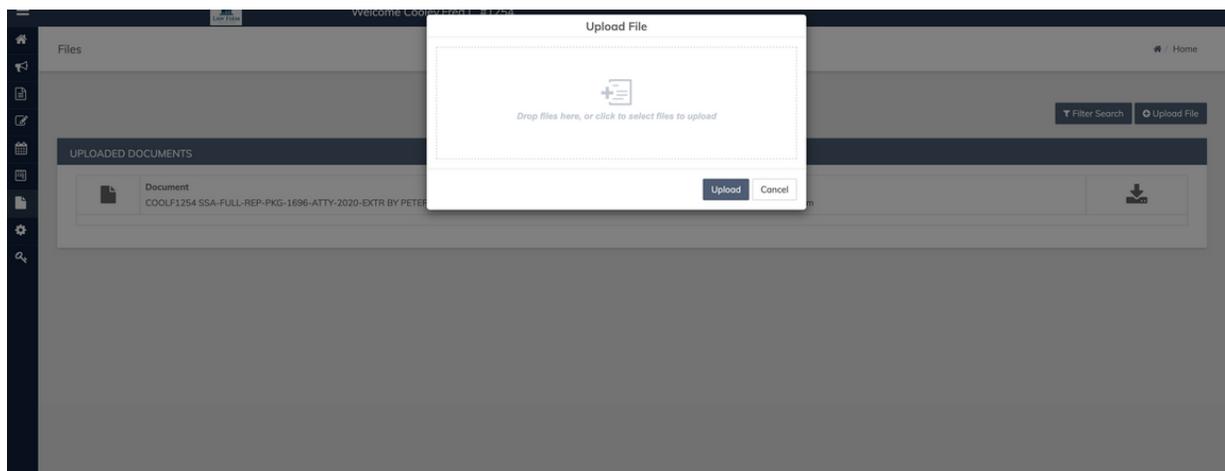
To edit a form, select the "Pencil" icon on the right of the form. Fill in the necessary information and submit the form. Your attorney will be notified once you submit your form.

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/down files

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.



# Symptom Diary

The symptom diary allows you to create and maintain a diary of symptoms related to your conditions. These entries can be added daily, weekly, or whatever interval you choose. These entries can be filtered and printed out as evidence in your disability case. You can also print it out and take it to your medical provider.

The screenshot displays the Symptom Diary application interface. At the top, there is a navigation bar with a home icon and the text "Symptom Diary". Below this is a form for adding a new entry, with fields for "Date", "Symptoms", "How long they lasted", and "Impact on your day". A "+" button is located to the right of the form. Below the form is a "Date Range" section with "From Date" and "To Date" input fields, a "Search" button, and a "Search by symptoms" button. An "Export" button is also present. Below the search section is a table of existing entries. The table has four columns: "Date", "Symptoms", "How long they lasted", and "Impact on your day". The table contains four rows of data. A "Get Started" button is visible in the bottom right corner of the interface.

Date	Symptoms	How long they lasted	Impact on your day
06/27/2022	Back Pain, Confusion, Migraines	Pain all day, and migraine lasted from 8:00 AM-2:00 PM	Unable to do any household chores or leave the house.
06/27/2022	Back Pain	4 hours	Had to take hot bath, extra pain meds, and couldn't function.
06/27/2022	Back pain	7:00 AM to 9:00 AM	Unable to leave the house. Postponed Dr visit
06/24/2022	Abdominal Pain IBS	8:00-10:00 AM	My IBS was flared up and felt exhausted most of the day

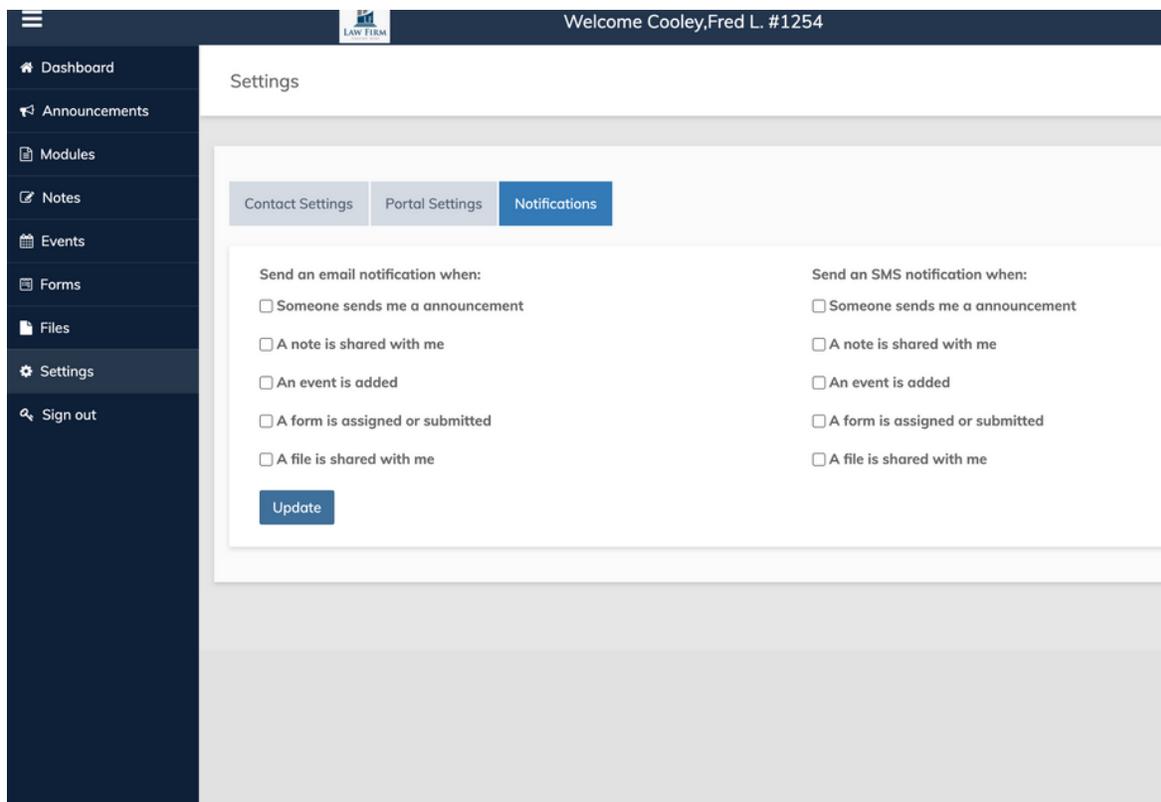
# Change my contact information

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'. 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.

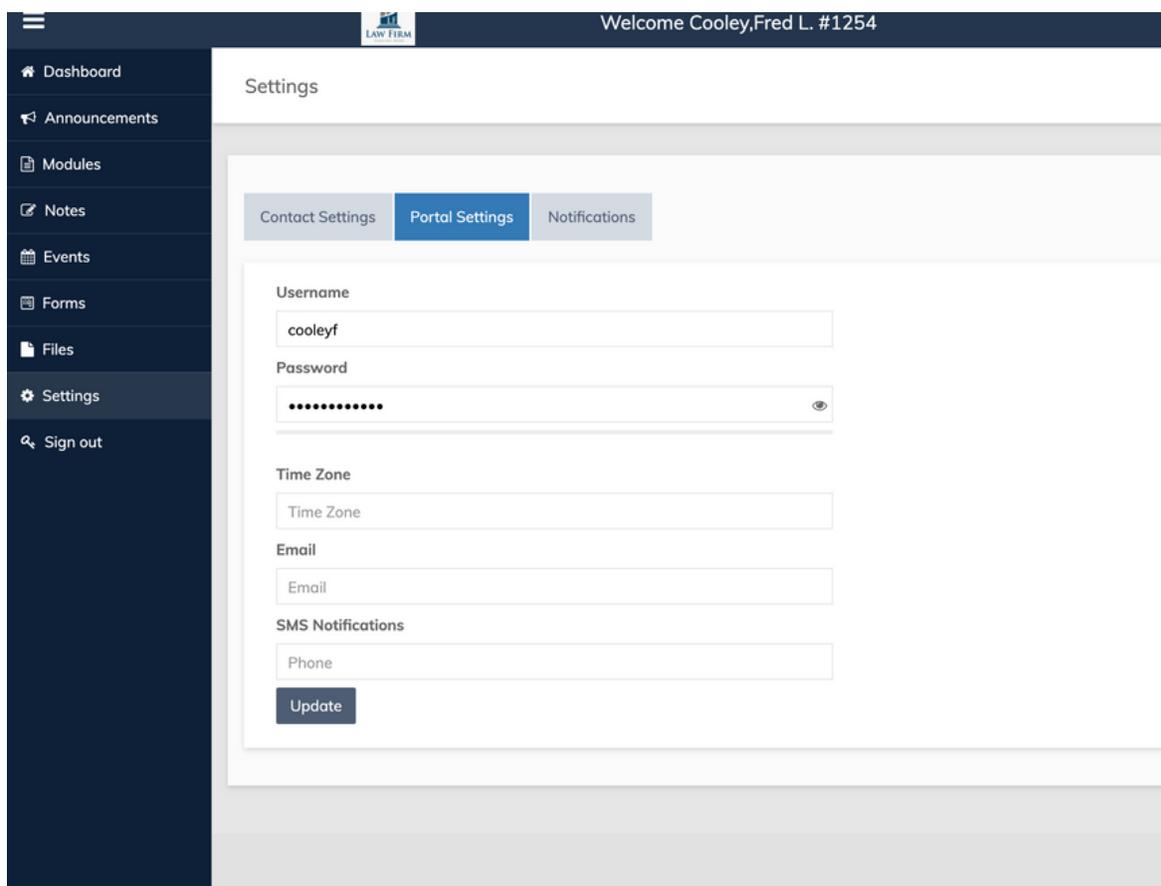
# Set your portal preferences

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)



# 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. 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.