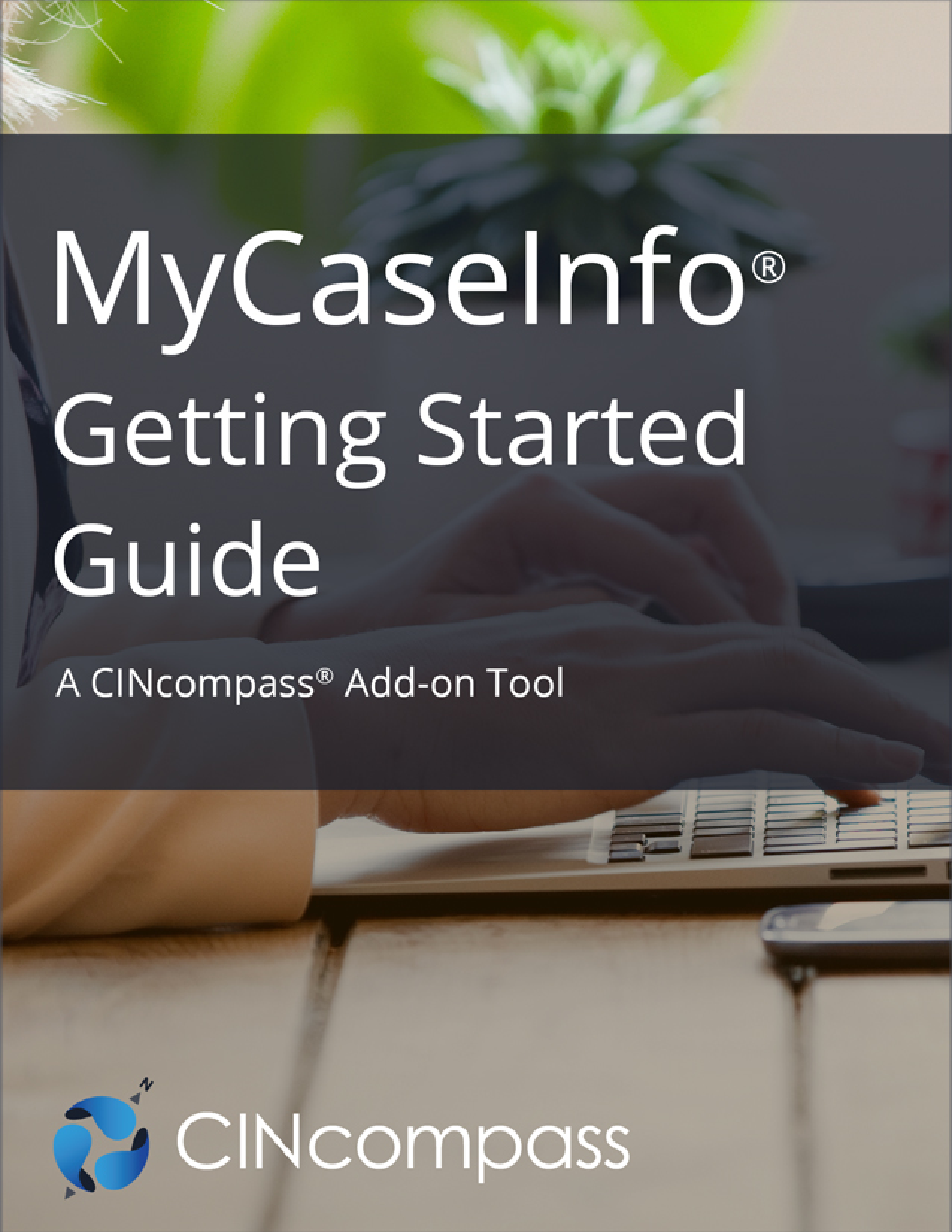

# MyCaseInfo® Getting Started Guide

A CINcompass® Add-on Tool

CINcompass

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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 any time and preview the completed questionnaire for accuracy prior to downloading.
- Import data directly into CINcompass.
- 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*

## LOGIN TO THE MYCASEINFO ATTORNEY ADMINISTRATION SITE

Go to https://www.mycaseinfo.com/Attorney/attyLogin.php. Enter your **ID NUMBER**, **USERNAME** and **PASSWORD** then click LOGIN.

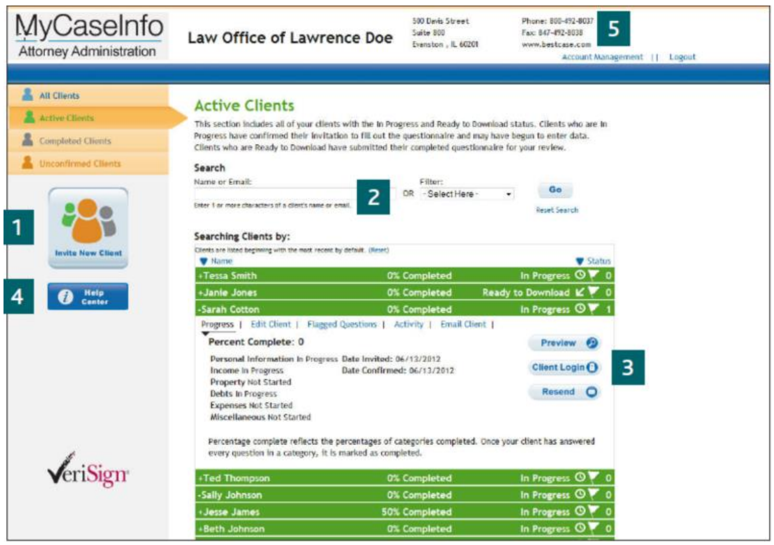
**TIP**: If you forget your login information, enter your Customer ID Number and your email address and you will receive an email with a new password.

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.




## Highlights of the Active Clients page in MyCaseInfo

1. **Invite a New Client** – Get started using MyCaseInfo by inviting a client to complete the questionnaire following specific instructions you provide.

2. **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.

3. **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.

4. **Help Center** – Access the User's Guide for in-depth answers to how-to questions and link to helpful web tutorials and online seminars.

5. **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:

Ex: 777-777-7777

*Email:

### Step 2 of 3: Client Options

Income Information

*Expected Completion Date: 05 / 1 / 2015

Current Income Period: 11/2014 thru 04/2015

*Request Tax Return Uploads Since: 2009

*Request Days of Paychecks: 60 Days

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 infomration 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.

# It is Easy 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.

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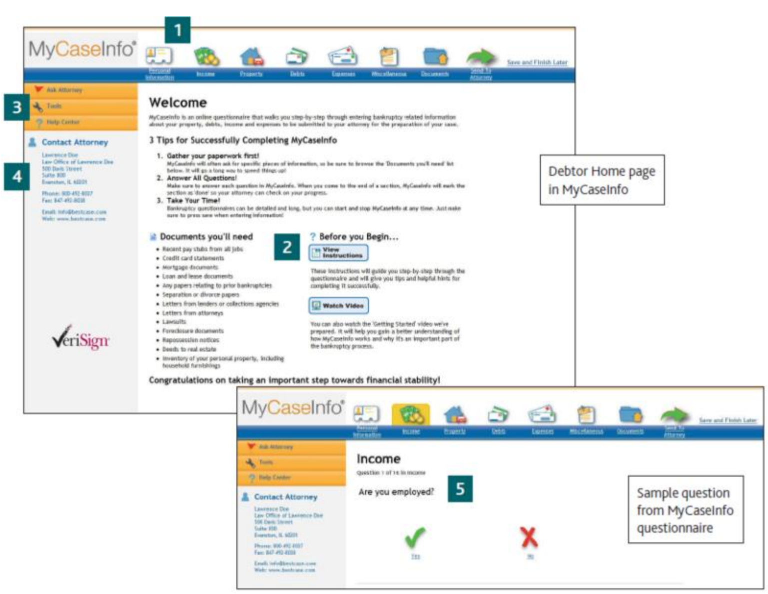
## DEBTOR SITE OVERVIEW

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.



## Highlights of the Debtor Home page in MyCaseInfo

1. **Clearly Identified Questionnaire Sections** – Only the information that the attorney wants completed are visible and accessible to the client.

2. **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.

3. **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.

4. **Attorney Contact Information** – The attorney's name, address, phone and fax numbers and email address are always visible in the left sidebar.

5. **Plainly Written Questionnaire** – Simple, easy-to-understand questions help clients complete the questionnaire quickly and accurately.

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# 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.

## Register for an Online Seminar

www.cincompass.com/MyCaseInfo

- 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 any time. What's New – View recent updates and changes to MyCaseInfo.

### Contact a Technical Support Representative

- Phone: 866-218-1003
- Email contact@cingroup.com
- Monday – Friday  8:00am – 9:00pm EST

Get your questions answered by technical experts.

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

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## 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 CINcompass** – Login as the client to easily update any last minute data before you purchase and download the file.

 