

Firm Central – Transcript

Using the Client Portal within Firm Central

Hi, I'm Kelly, and today I'm gonna share with you the Client Portal, a great new feature of Firm Central. The Client Portal is a secure web-based portal allowing law firms, and their clients, to collaborate through an easy-to-use online interface. Law firms can send documents, including intake forms and messages, to their clients. Clients can review those documents, share their own documents, complete forms, and send messages to the firm.

The Client Portal is very easy to use. When in Firm Central, simply click into the Matter tab. Select the matter you want to initiate the Client Portal for. When you review the matter profile, you will see the tab at the top labeled Client Portal. Click on this tab. From here, you will see the option to start sharing documents with your client and open the portal. When you click the button to open the portal, a new message will pop open letting the attorney know that the portal allows them to share documents, as well as receive documents, from a client. The client's e-mail address will also pre-populate in the field for verification. If no e-mail address was provided when the client was set up, the e-mail address can now be entered and Firm Central will update the client contact form for future reference.

The attorney will have the option to send a message to the client here, as well. Once the attorney presses the Send E-mail button, Firm Central will generate an e-mail message to the client. The Client Portal is now available for document and message sharing. From this point, the attorney can upload and share a document from their desktop, or they can share a document that's already been uploaded into Firm Central.

For the purposes of this demo, let's share an existing document. I can click on the Share an Existing Document icon here and Firm Central will prompt me to choose the document I wish to share. Once I have shared the document, we will see it listed on the Client Portal tab.

One great feature of the Client Portal is tracking. You can see here that the document was shared by the attorney on August 13th, 2014, at 12:10 pm. This time stamp will update once the client has reviewed the document so the law firm can track when items have been received.

The document also has a status indicator flag, where the attorney can see when the client has marked the document as reviewed or complete. To the right is where you will see the ability for the attorney to send secure messages to the client regarding their case.

Clients can respond to the attorney in the same fashion. If I click on the Documents tab, I can see the icon indicated that the document is currently being shared with a client. From this tab you will see the Client Portal Sharing icon as I have the ability to share documents from here, as well.

Now let's take a look at the client's experience with the Client Portal. Once the portal is opened in Firm Central, the client will receive an e-mail message, from Firm Central Thomson Reuters, prompting them to set up a one pass account. The law firm's name will be referenced in the subject line. Clients will click on the link to register for their one pass account. The form will be auto-filled with their information, and they will need to complete the basic information selecting their user name and password. Once completed, the client has the ability to access the secure portal and any documents or message the firm has shared with them.

Clients log into the portal at portal.westlaw.com, with the one pass credentials they created. Clients will need to agree to the terms and conditions on a click through screen prior accessing for the first time. The law firm name will appear at the top of the portal screen. There are four pages to the portal. My Tasks are the most recent documents and messages that the law firm has shared with the client that haven't been reviewed. Clients can open and review documents, and indicate when they have completed their review of the document. This will change the status indicator flag in Firm Central to Complete.

The All Files page will display every document and message ever shared via the portal. The Upload page gives the client the ability to upload documents that the law firm has requested, and the Cases page gives the client the ability to toggle between cases if they have more than one open case with the firm.

Another great feature of the Client Portal is that it gives the law firm the ability to send forms to a client for completion. The attorney can seamlessly access their Form Builder account from Firm Central. In Form Builder, they can search for an existing form, or, with our custom forms products, they have the ability to upload their own forms into Form Builder. The document can then be shared directly to the client from Form Builder via the Client Portal. Simply select the client's name from the drop down list, select their matter, and add an e-mail message, if you wish. The client will then see the form appear in their client

portal. The client will complete the form in the portal, and once marked Complete, they will no longer have the ability to change the form going forward.

The attorney then receives the completed form in Firm Central.

Thanks for taking the time to learn about the Client Portal in Firm Central.