

# A Guide to Your Client Portal

Everything you need to know about your case:  
Communicate and collaborate with your attorney  
in one easy-to-use online portal!

Your client portal serves as a secure and central place to communicate with your firm/organization, complete tasks, complete your electronic questionnaire, check USCIS receipt case tracking status, view/pay invoices, and upload/download files related to your immigration case.

This article serves as a comprehensive guide for clients using the Docketwise Client Portal, that guides you through each step involved in using the client portal.



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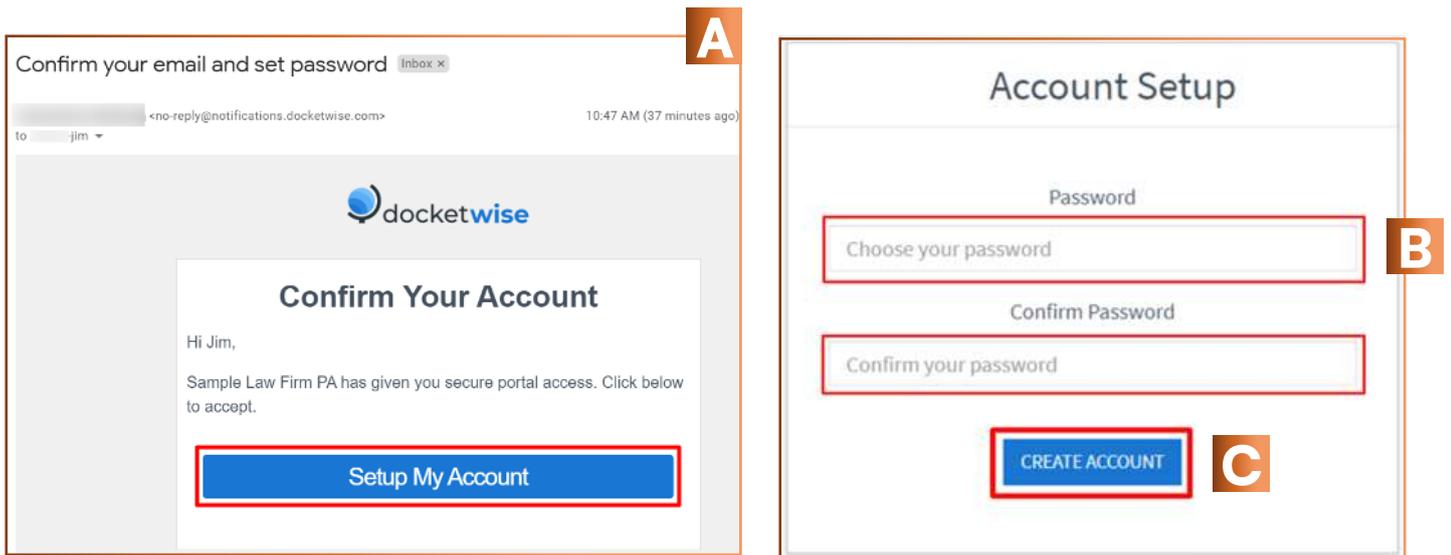
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# Access the customer portal

Below you will find information on how to log in to the Customer Portal and set up two-factor authentication



Access [client.docketwise.com](https://client.docketwise.com) from your browser.

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## Start

To get started, you will need to receive an invitation to your secure Customer Portal and follow these steps:

- A** In the portal invitation email (titled "Confirm your email and set password" and sent by no-reply@notifications.docketwise.com), click the Set up my account button.
- B** Enter and confirm a secure password that will be used to log in to your account.
- C** Click the Create Account button.

A screenshot of the "Client Login" form. The form has a title "Client Login" at the top. Below the title are two input fields: "Type your email" and "Type your password". Underneath these fields is a checkbox labeled "Remember me". At the bottom of the form are two buttons: a blue "LOGIN" button and a white "RESET PASSWORD" button. A red rectangular box highlights the "LOGIN" button, and a small orange square with the letter "A" is positioned to its left.

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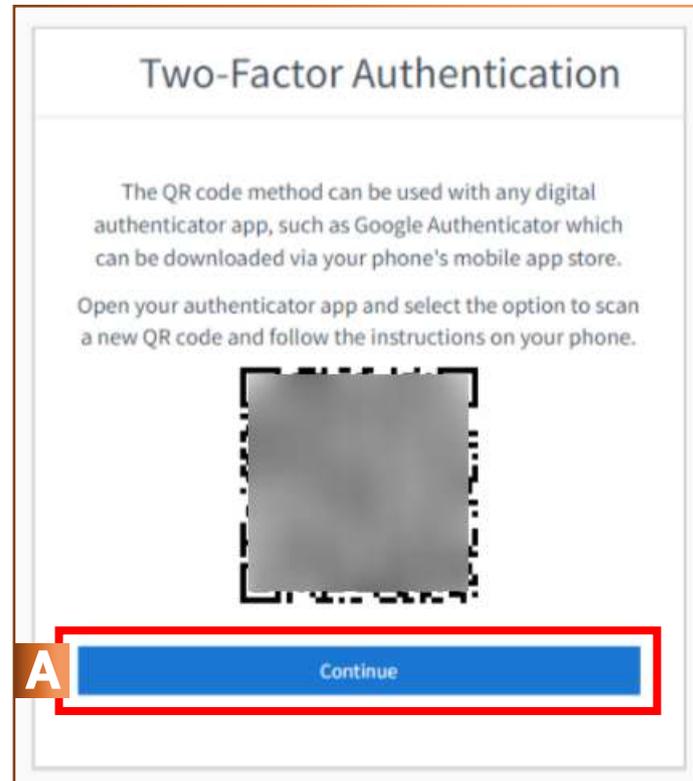
## Log in

Logging into your portal is easy! To do this, you must follow the steps detailed below:

Enter your email and password.

**A** Click the Sign In button.

Enter the secure login code (only if two-factor authentication is enabled).



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# 1

## How to configure two-factor authentication <sup>\* optional</sup>

If two-factor authentication is enabled for your client portal, you will have an additional login step to access your client portal. If logging in for the first time with two-factor authentication enabled, you will need to complete the following steps:

- Open the authenticator app of your choice on your mobile device.
- Select the option to add a new application.
- Scan the QR code from the portal login workflow.

- A** Click the Continue button.
- Enter the OTP code from your authenticator app.
- Click the Authenticate button.

After you have set this up, you will be logged into your account. You will need to use the OTP security code as part of the login.

# How to reset your password

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**A** Type your email

Cancel **B** Send

**C** CREATE ACCOUNT

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If you forgot your password, you can reset it by following the steps below:

Click the Reset Password button.

**A** Enter the email address associated with your customer portal.

**B** Click the Submit button.

In the password reset email (titled "Password reset instructions" and sent by [no-reply@notifications.docketwise.com](mailto:no-reply@notifications.docketwise.com)), click the Change my password button.

**C** Enter and confirm the password you will use to log in to your account.

# How to navigate the Customer Portal

When you log in to your Customer Portal, you will be directed to the Control Panel.

Your Portal

Modern Law, LLP

Dashboard

Messages

Tasks

Forms

Receipts

Invoices

Files

LOGOUT

**Tasks**

- Task 1
- Task 2
- Task 3
- Task 4

[see all](#)

**Forms**

**Name**

Larry LawPay's Smart Form

[see all](#)

**USCIS Receipts**

- E-3  
Card Was Delivered To Me By The Post Office  
I-485 Receipt

[see all](#)

**Invoices**

Balance	Status	
\$7,500.00	Unpaid	<a href="#">Pay</a>

[see all](#)

**Files**

**File**

Engagement Agreement.pdf

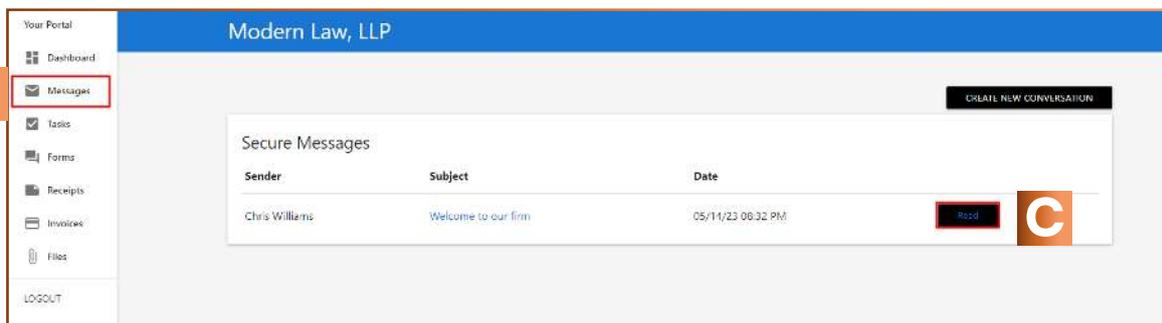
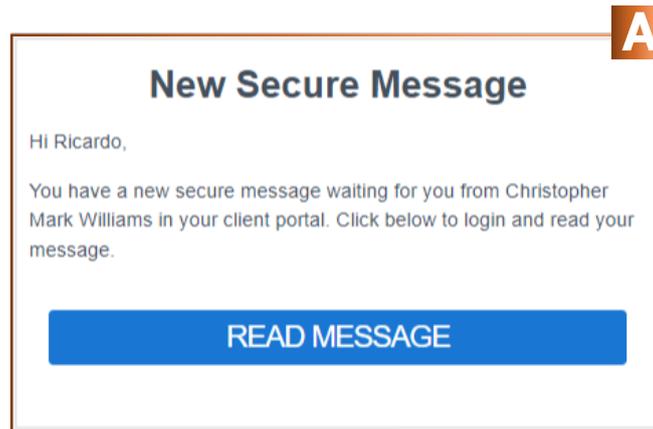
[see all](#)

## 3

From the Dashboard, you can view a summary of your Tasks, Forms, USCIS Receipts, Invoices, and Files. These summaries will show only some of these documents. To see a comprehensive list of what has been shared with you, you can click the "See all" option or the corresponding option in the navigation sidebar.

# Portal Messaging

Portal messaging allows you to securely and conveniently communicate with our firm from the Customer Portal.



## 4

### Access your messages

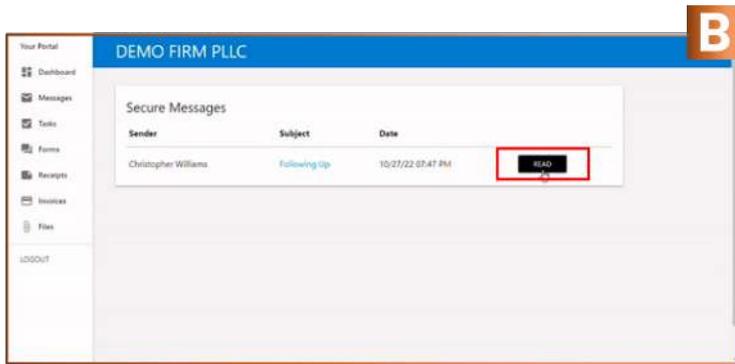
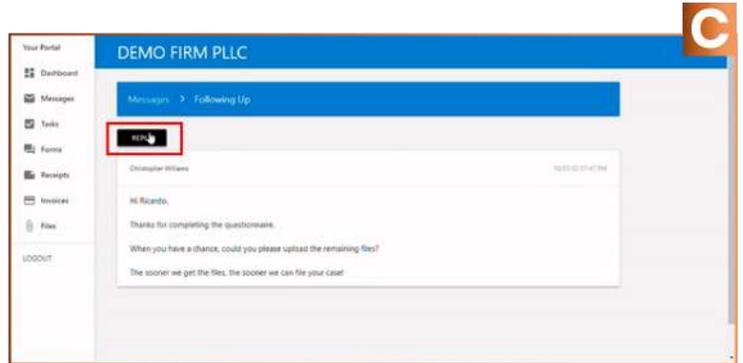
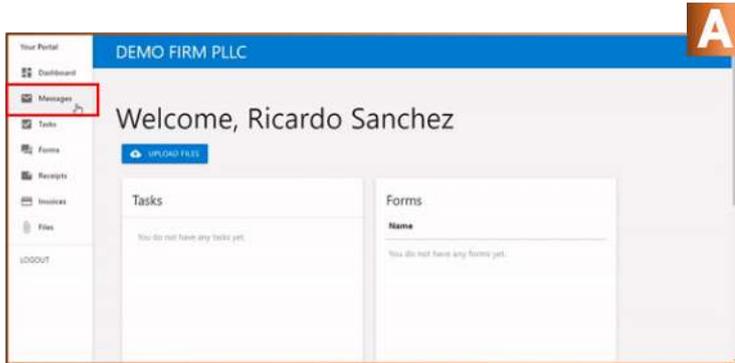
- A** When you receive a message, you will be sent an email notification asking you to log in to read the received message.

To read messages from your portal, you must log in and follow these steps:

- B** Click the Messages option in the side navigation bar.  
**C** Click the Read button for the message you want to access.



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## 4

### How to reply to a message

To reply to a message, follow these steps:

- A** Click the Messages option in the side navigation bar.
- B** Select the message you want to reply to and click the "Read" button.
- C** Click the Reply button and type your response.
- D** Click the Submit button



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Your Portal

Modern Law, LLP

Dashboard

Messages **A**

Tasks

Forms

Receipts

Invoices

Files

LOGOUT

CREATE NEW CONVERSATION **B**

Secure Messages

Sender	Subject	Date	
<b>C</b> Chris Williams	Welcome to our firm	05/14/23 08:32 PM	<b>D</b> Read

## 4

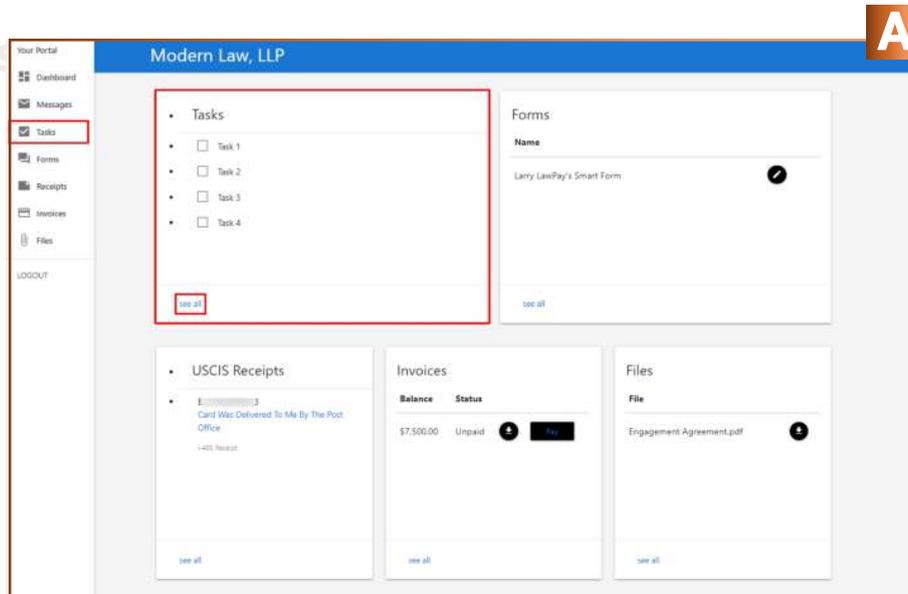
### How to start a new conversation using Messages

To start a new conversation or secure message thread through the customer portal, follow these steps:

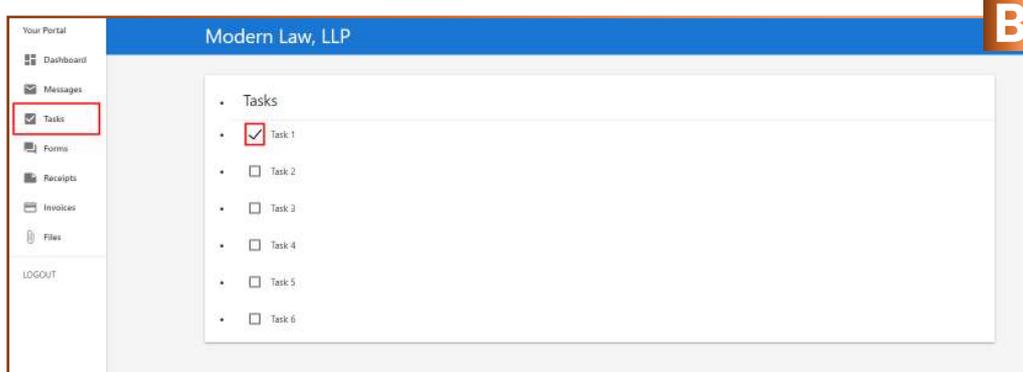
- A** Click on the Messages option in the navigation sidebar.
- B** Click the "Create a new conversation" button.
- C** Enter the title and content of your message.
- D** Click the "Submit" button.

# How to view and complete tasks

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A



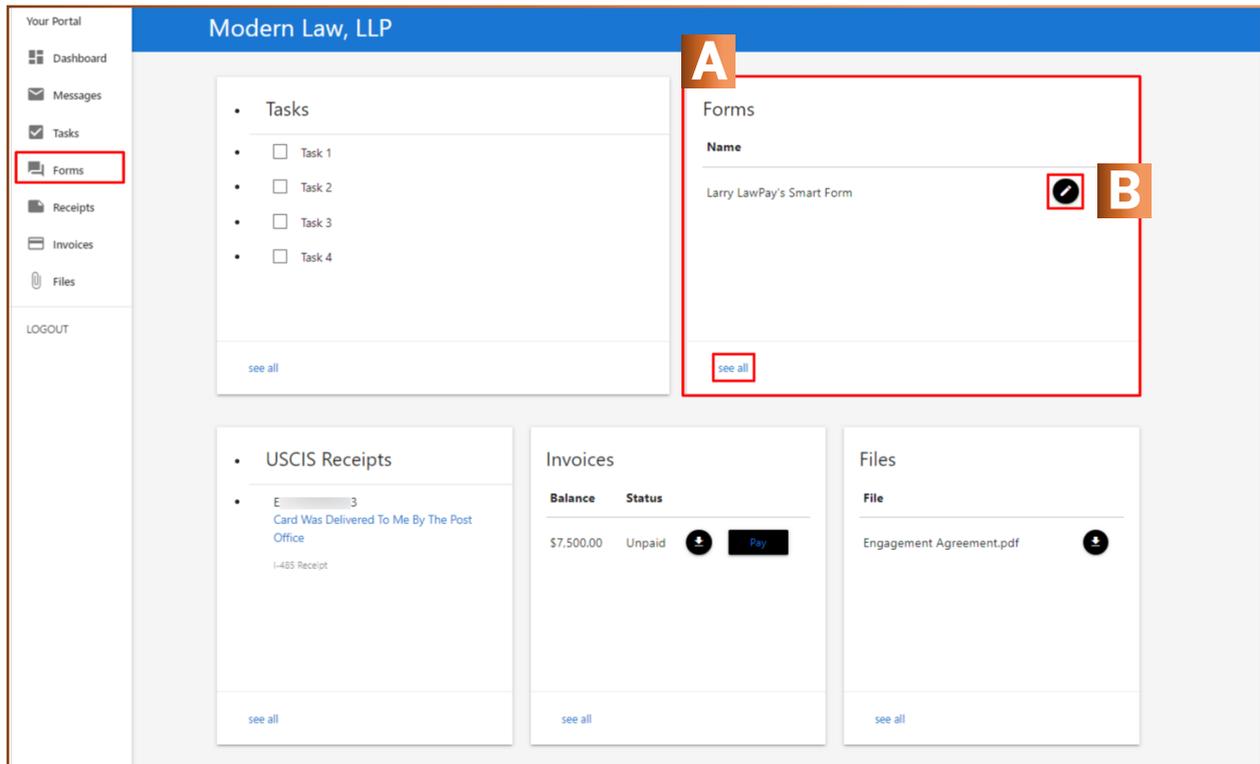
B

5

**A** You can view a summary of the tasks assigned to you in the customer portal dashboard. To view all your tasks, click "See all" on the 'Tasks' card or tap 'Tasks' in the navigation sidebar.

**B** To mark that you have completed a task, click the check box corresponding to it.

# How to complete a questionnaire or electronic form



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**A** You can view a summary of the forms and questionnaires that have been shared with you in your customer portal dashboard. To view all your forms and questionnaires, click "View All" on the 'Forms' card or tap 'Forms' in the side navigation bar.

**B** To access a quiz, click the icon next to the quiz you want to open.

# View USCIS Receipt Tracking Status

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The screenshot shows the 'Modern Law, LLP' customer portal. The left sidebar contains navigation options: Dashboard, Messages, Tasks, Forms, Receipts (highlighted with a red box and labeled 'A'), Invoices, and Files. The main content area is divided into several sections: 'Tasks' (with a 'see all' link), 'Forms' (showing 'Larry LawPay's Smart Form' with a checkmark and a 'see all' link), 'USCIS Receipts' (highlighted with a red box and labeled 'B'), 'Invoices' (showing a balance of \$7,500.00, status 'Unpaid', and a 'Pay' button), and 'Files' (showing 'Engagement Agreement.pdf' with a plus icon). The 'USCIS Receipts' section contains a receipt for 'Card Was Delivered To Me By The Post Office' (highlighted with a red box and labeled 'C') and a 'see all' link (highlighted with a red box).

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- A** USCIS receipt tracking statuses that have been shared with you are visible from the customer portal dashboard. If you would like to view this complete information, click "View All" on the 'USCIS Receipts' card or select 'Receipts' in the sidebar navigation.
- B** From there you can view updated information about the status of your USCIS case directly in your client portal.
- C** If you want to see the status of the case on the USCIS website, click on the blue text.

# File upload and download

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The screenshot displays the 'Modern Law, LLP' Customer Portal dashboard. On the left sidebar, the 'Files' menu item is highlighted with a red box and a white letter 'A'. The main content area is divided into several sections: 'Tasks' (listing Task 1-4), 'Forms' (listing 'Larry LawPay's Smart Form'), 'USCIS Receipts' (listing a receipt for 'E-3'), 'Invoices' (listing an invoice for \$7,500.00), and 'Files' (listing 'Engagement Agreement.pdf'). The 'Files' section is highlighted with a red box, and its 'see all' link is also highlighted with a red box.

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**A** You can view a summary of files that have been shared with you in the Customer Portal dashboard. To view all your files and folders, click 'View All' in the Files card or tap 'Files' in the navigation sidebar.



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Your Portal

- Dashboard
- Messages
- Tasks
- Forms
- Receipts
- Invoices
- A** Files
- LOGOUT

Modern Law, LLP

**B** Upload Files

Files & Folders

All files/Documents/ Identity Documents

Name	Added By	Upload Date	Actions
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**C** This folder is empty

Upload Files

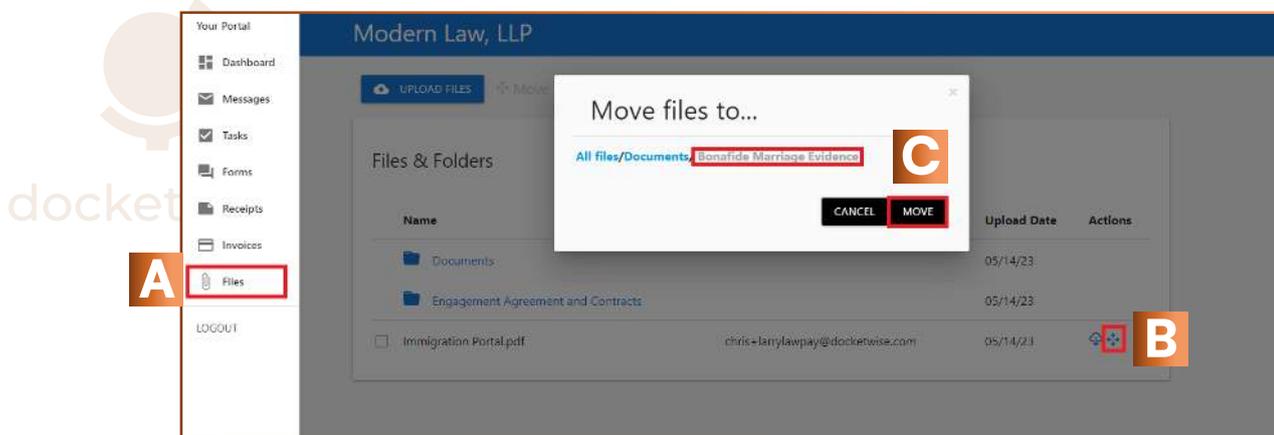
## 8

### How to upload files

To upload a file through the customer portal, follow these steps:

- A** Click "View All" in the 'Files' card or select 'Files' in the navigation sidebar. If you want to upload the file to a specific folder, open that folder.
- B** Click the "Upload Files" button. Choose the files you want to upload.
- C** Click the "Upload" button.

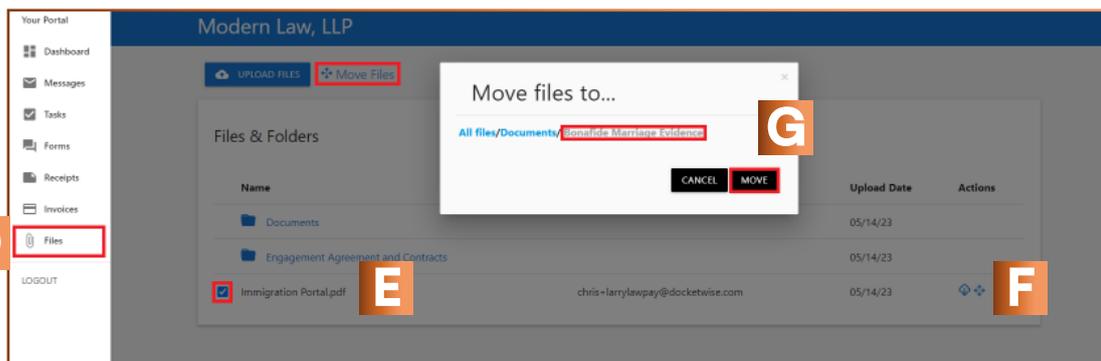




**A**

**C**

**B**



**D**

**E**

**G**

**F**

## 8

### How to move files

If you want to move a file you uploaded to another folder, follow these steps:

**A To move a single file:**

- B** Click "View All" in the 'Files' card or select 'Files' in the navigation sidebar. Click the icon next to the file you want to move.
- C** Inside the dialog box, open the location where you want to move the file. Click the Move button.

**D To move multiple files:**

- E** Click View All in the Files card or select Files in the side navigation bar.
- F** Select the files you want to move by checking their corresponding box. Click the Move Files button.
- G** From the dialog box, open the location where you want to move the file. Click the Move button.



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Your Portal

Modern Law, LLP

UPLOAD FILES Move Files

Files & Folders

Name	Added By	Upload Date	Actions
Documents		05/14/23	
Engagement Agreement and Contracts		05/14/23	
<input type="checkbox"/> Immigration Portal.pdf	chris+larrylawpay@docketwise.com	05/14/23	

LOGOUT

**A**

## 8

### How to download files

Both files that you have shared and files that have been shared with you can be easily downloaded.

**A** To download a file, you can click the icon ↓ next to it.