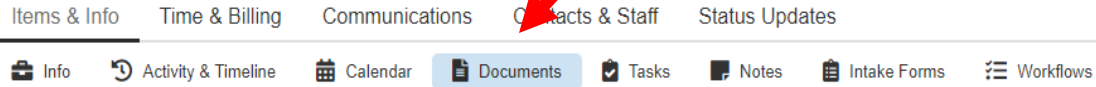






























1. Go into Client's MyCase File.

2. Click Documents.

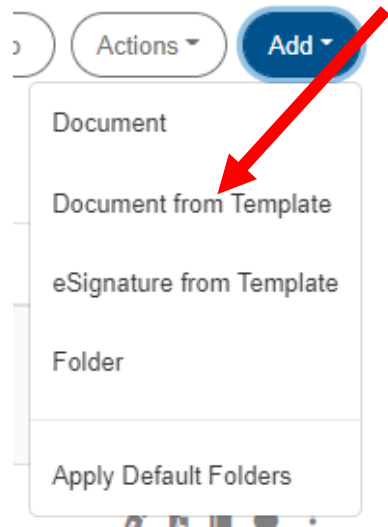


3. Click the blue "Add" on the right hand side.

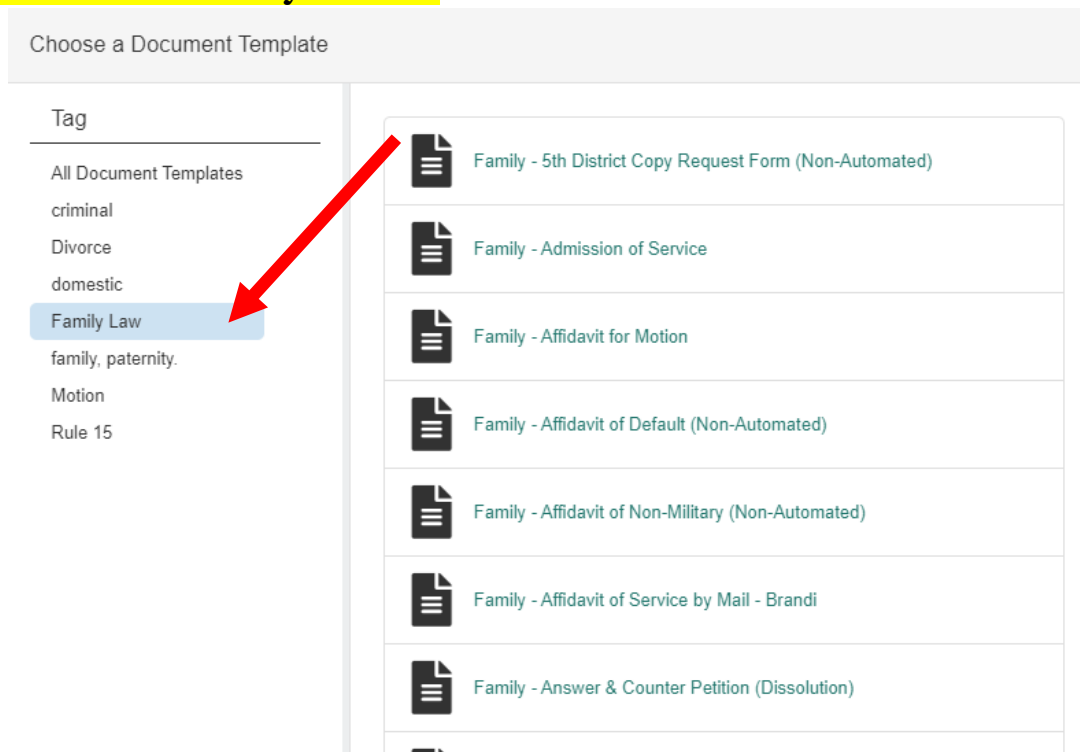
The screenshot shows the 'Documents' page for 'Testy McTestorson'. It includes a search bar, a table of documents, and an 'Add' button on the right. A red arrow points to the 'Add' button.

<input type="checkbox"/>	TITLE ▾	ASSIGNED DATE ▾	SHARED WITH	LAST UPDATED ▾	
<input type="checkbox"/>	 Paternity_Action.docx ↗ Paternity_Action.docx	Jul 9, 2021	 1 Contact	Jul 9, 2021 by Sandra L Coon	    
<input type="checkbox"/>	 ICMC Data Sheet ↗ ICMC template.docx			Aug 27, 2019 by Jason C Kohlmeyer	    
<input type="checkbox"/>	 test 2 ↗ test 2.docx	Apr 8, 2019		Apr 8, 2019 by Jason C Kohlmeyer	    
<input type="checkbox"/>	 sample Answer ↗ sample Answer.docx	Apr 8, 2019		Apr 8, 2019 by Jason C Kohlmeyer	    

4. Select "Document from Template."



5. Select "Family Law."



6. Select the file you need.

7. Click the name of the client in the little green letters.

Choose a Document Template

Tag

All Document Templates

criminal

Divorce

domestic

Family Law

family, paternity.

Motion

Rule 15

Family - Answer & Counter Petition (Dissolution)

Merge Document With These Records

Case/Matter

Testy McTesterson (07-CR-09-1234) X Browse All

Contact

X Browse All

Suggested: Testy McTesterson

Continue

8. Click “Continue”

9. Click “Download” in the new box that pops up.

Save Merged Document

Getting Started Tips ✕


When uploading a document, you first need to select the **Case Link**, if any. Once you select the case the **Sharing** options will load on the right side where you can choose which users can view this document.

The **Doc. Name** is the name that will be used throughout MyCase to identify this document. Click on **Source** to select the file that you want to upload. There are no restrictions on the types of files you can upload, and all files are encrypted before they're saved. You can also attach **Tags** (words or phrases) to organize your document and make it easy to find later.

Read more about uploading documents by [clicking here](#).

Case Link [Browse All](#)

This document is not linked to a case

Folder Name  Testy McTesterson

Doc. Name

Assigned Date


Tags [Browse All](#)


Description


This description will be viewable by anyone this document is shared with.

Contact Share

Note: When you share this document, clients will receive an email with a link to view it in the client portal. [What will my client see?](#) ✕

 Select All

 Testy McTesterson

 This item will be automatically shared with all firm users linked to Testy McTesterson.

- Accounting Roko
- Jason C Kohlmeyer
- Jill Hanson
- Jillian Morris
- Kate Cartier
- Sandra L Coon
- Thomas K. Hagen

[Download](#) [Save and Open](#) [Save and Close](#)

10. Open the downloaded document and save to the sharepoint file as you normally would.

11. Enjoy!