> CLOSING the GAP <

Pro Bono Advocate Quick Start Guide

As an advocate, you can update your profile, view your clients' profiles, view and upload documents to your clients' profiles, start a virtual consultation with your client, and use interactive interviews. This quick start guide provides brief summaries of each of these functions. For more detailed information, please refer to the corresponding section of the full User Guide.

1) Update Your Profile

a. Navigate to "Your Account"
b. Select "Your Information"
c. Upload a new photo of yourself
    i. Click "Upload New"
    ii. Select an image file from the hard drive
    iii. Crop the image and click "Save"
d. Change first name, last name, or phone number (if username is email) and click "Save Changes"

2) View Your Clients' Profiles

a. Go to the "Clients" section of your account dashboard
b. Use the search/filter or browse the list for the client's name
c. Click on the name of the client whose profile you want to view

3) View Your Clients' Documents

a. Go to the "Clients" section of your account dashboard
b. Click on a client's name to open their profile
c. Click on "Client Files"
d. Click on "Client Files" to view the client's case related files

4) Upload Documents to Your Clients' Profiles

a. Go to the "Clients" section of your account dashboard
b. Click on a client's name to open their profile
c. Click on "Client Files"
d. Click the "Browse…" button and select a file
e. Click the "Upload File" button

5) Start a Virtual Consultation with a Client

a. Go to the "Clients" section and click on an open case
b. Click on "Start Virtual Consultation"
c. Send an instant message (e.g. "hello, are you ready?") to confirm that the client is ready
d. When the client responds to the instant message, click on the video icon to initiate the video conferencing
e. When client also clicks on the video icon, the video conference will start

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