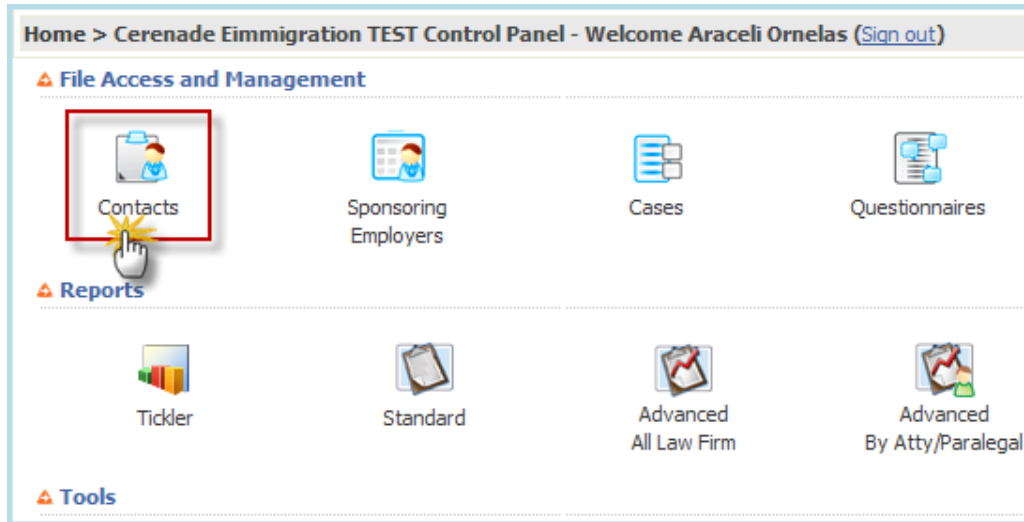
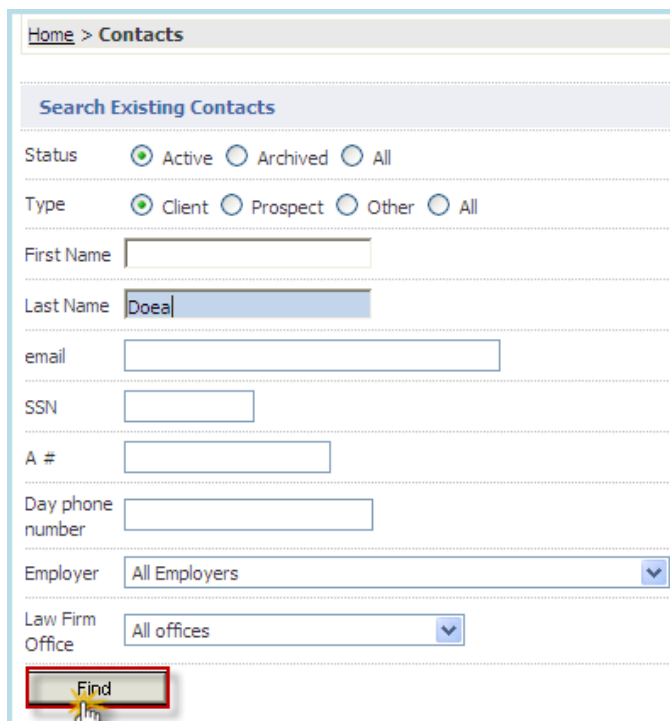



GIVING CLIENTS ACCESS TO EIMMIGRATION

1) Go to **Home** and click on **Contacts**.





2) Search for the client profile by First Name, Last Name, email, SSN... and click **Find** button.



3) Open the case by clicking on the  icon.

Home > Contacts > Results

Results - 1 to 1 of 1 Page 1

Actions	Name	DOB	Status	Employer	email	Dayphone	SSN
 	Johnny DOEA	09/20/1975	Client		johnny.doea5@gmail.com	513-258-9961	123-00-4213

Results - 1 to 1 of 1 Page 1

4) Click on the **Client-Access** tab.

Home > Contacts > Johnny DOEA

Personal Info	History	Members	Attachments	Comments	Client-Access	Cases
General Information	Personal Documents	Status/Additional Docs.	Current Addresses	Additional Information		

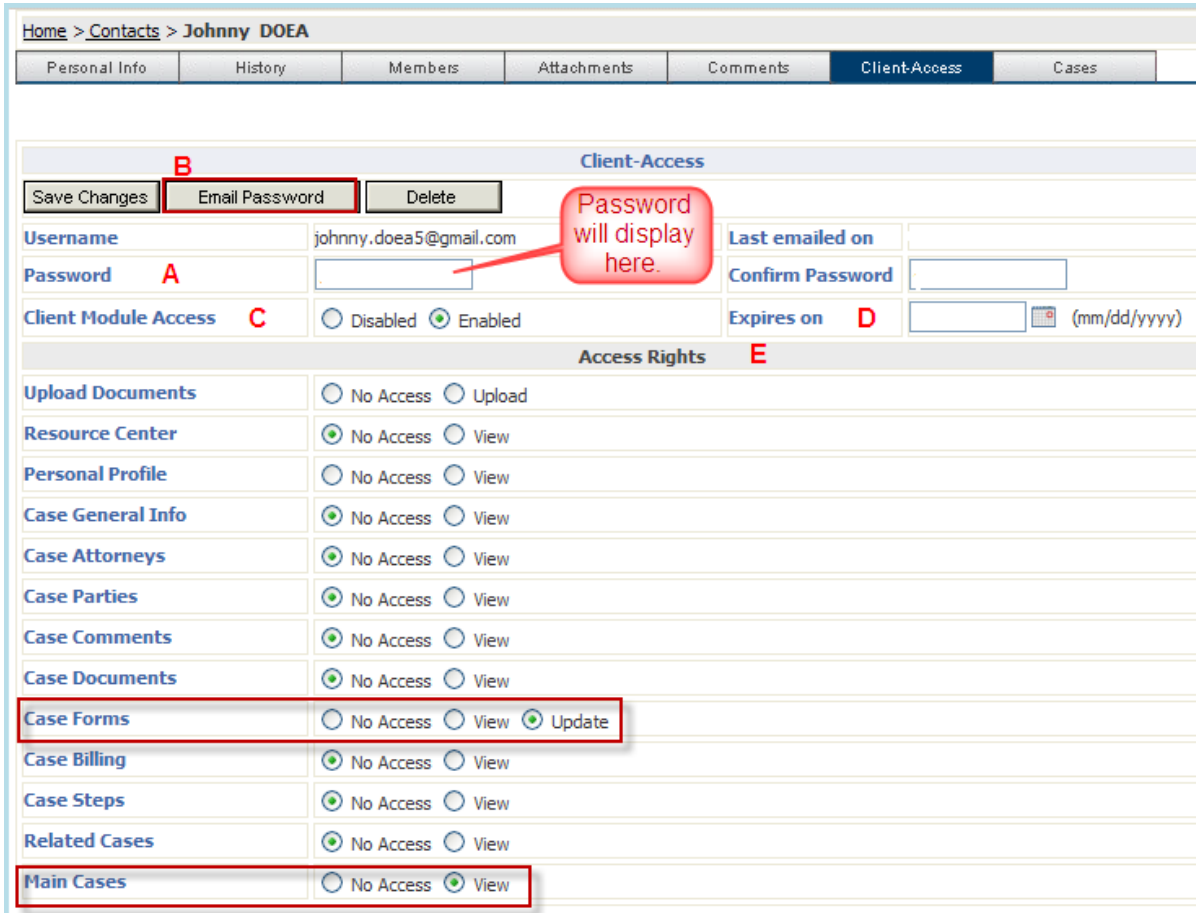
Update Biographic Information (Required information *)

Status * Active Archived Type * Client Prospect Other

First Name * Last Name *

Middle Name Maiden Name

5) In the “Client-Access window” it allows you to:



Access Rights E	
Upload Documents	<input type="radio"/> No Access <input type="radio"/> Upload
Resource Center	<input checked="" type="radio"/> No Access <input type="radio"/> View
Personal Profile	<input type="radio"/> No Access <input type="radio"/> View
Case General Info	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Attorneys	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Parties	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Comments	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Documents	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Forms	<input type="radio"/> No Access <input type="radio"/> View <input checked="" type="radio"/> Update
Case Billing	<input checked="" type="radio"/> No Access <input type="radio"/> View
Case Steps	<input checked="" type="radio"/> No Access <input type="radio"/> View
Related Cases	<input checked="" type="radio"/> No Access <input type="radio"/> View
Main Cases	<input type="radio"/> No Access <input checked="" type="radio"/> View

A) Provide username/password to client: Give your client a username and a password (if none is set) or change password by typing in the new password and confirm password.

B) Email Password: In the **Email Password** button click to send the email to client.

C) Enabled or Disable client module access: In the **Client Module Access** make your selection.

D) Access Expiration Date: In the **Expires on** set the date this account will automatically become disabled. If you leave this field blank then account is always enabled until it is manually disabled.

E) Limit Access to Portions of a case: In the **Access Rights** select the type of access rights your user is allow. For example, if you want your client to edit forms or update then set **Case Forms** to **Update** and set **Main Cases** to **View**.

Note: Remember to **Save Changes**.



Related Articles:

Giving client(s) access to Eimmigration to view and edit forms:

<http://www.cerenade.com/eimmigration/AccessToViewAndEditForms.pdf>

For more information and articles, please visit www.eimmigration.com