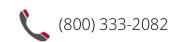


Guide to the

Client Community Portal

Updated 11.6.24

Instructions and Navigation







Welcome to the **Huseby Client Community Portal**. Take advantage of the portal to access your calendar of upcoming events and the details of those events. Find links to your remote depositions, or Google Maps links to your in-person events. Download job files, review invoices by line item, make payments, request support or schedule a job, and so much more!

Need access or assistance?

Contact Support at

support@huseby.com

Upon logging in, the **HOME** tab is your default view.

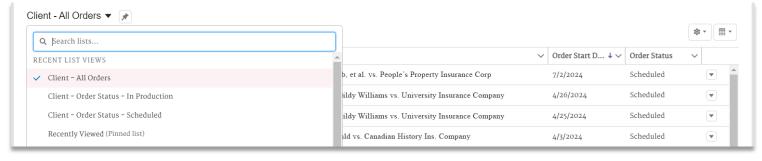


ORDERS (EVENTS): At the home button, you'll find your **ORDER/EVENT** information – for both scheduled *and* past events.

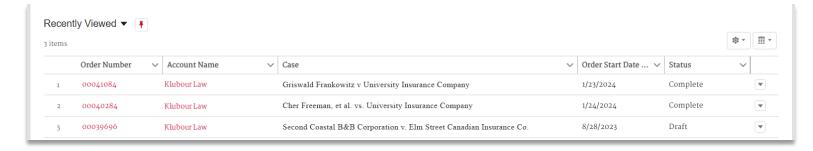
Line items include *Order Number* (a link), *Account Name* (a link), *Case*, *Order Start Date*, and order *Status*.



You can change your view between **ALL ORDERS, RECENTLY VIEWED, SCHEDULED, IN PRODUCTION, and TRANSCRIPTION DRAFT ORDERS**.



RECENTLY VIEWED:



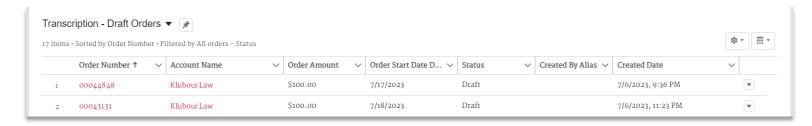
ORDER STATUS - SCHEDULED:



ORDER STATUS – IN PRODUCTION:



TRANSCRIPTION – DRAFT ORDERS:

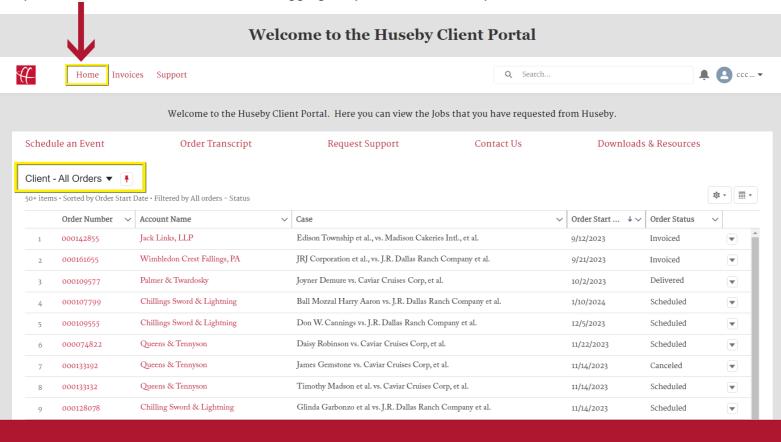


You can also **PIN** your favorite view.

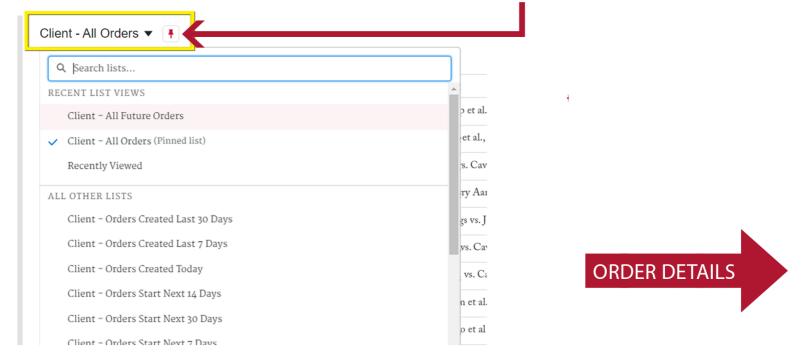


YOUR ORDERS

On your **HOME** screen - the default when logging in - you can view all of your **ORDERS**.



Click the **drop-down arrow** to choose from different views. It's helpful to set your DEFAULT view to CLIENT-ALL ORDERS, by first choosing it in the drop-down menu, then *pinning* it:



ORDER DETAILS

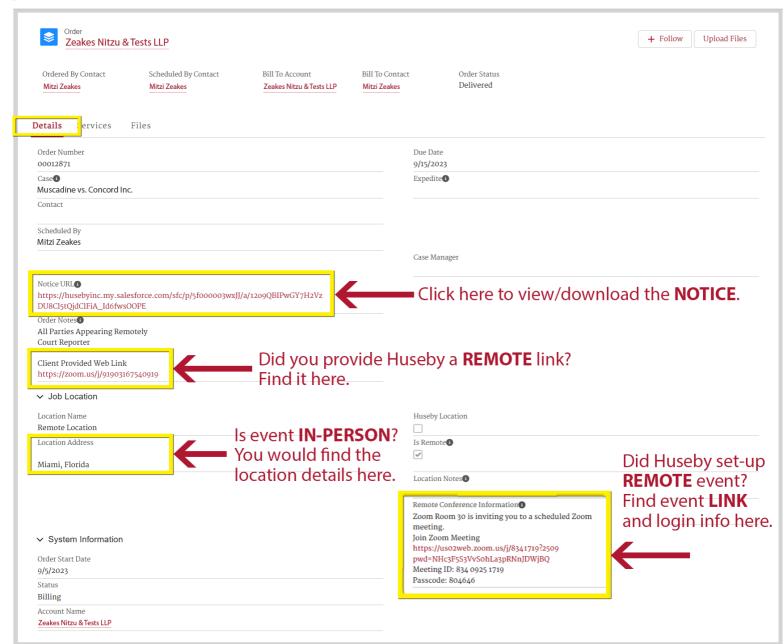
The **ORDER NUMBER** takes you to the details for that order. Simply click to go to details page.



ORDER DETAILS TAB

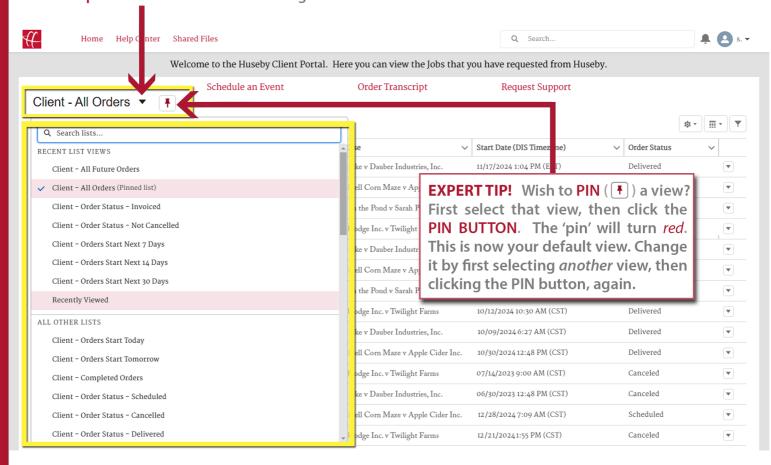
Your go-to for Job Details - past and upcoming - including future job details: Job Notice, location information and/or remote event link.

Invoiced - Job Order Complete and Billed
Delivered - Job Order Delivered; will be Billed
Scheduled - Upcoming Jobs on Calendar
Canceled - Canceled Jobs on Calendar



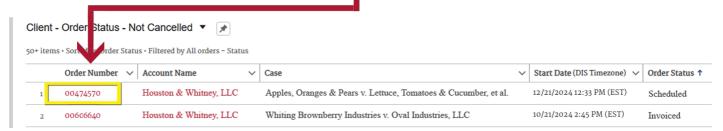
CHOOSING ORDER LIST 'VIEWS'

On the HOME page, you can choose among various *VIEWS* to see a list of your Order Details. Simply click this drop-down arrow to choose among them.



NAVIGATING TO JOB FILES LOCATION

From the Client portal HOME page, click an Order Number to navigate to its Order Details page.

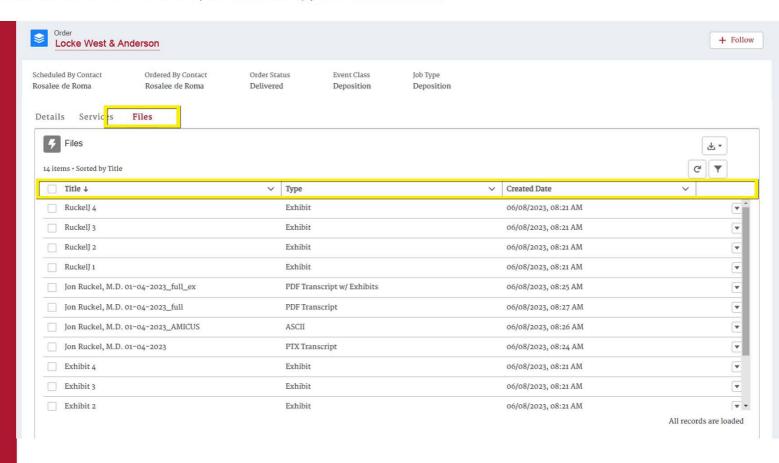


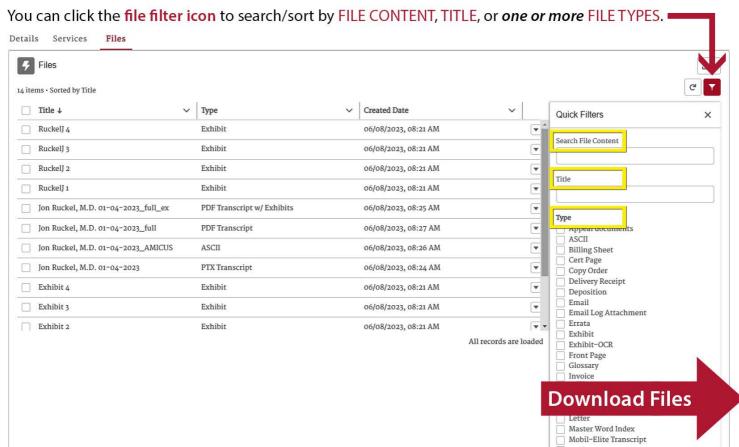
On that page, click the FILES tab.



FILES TAB

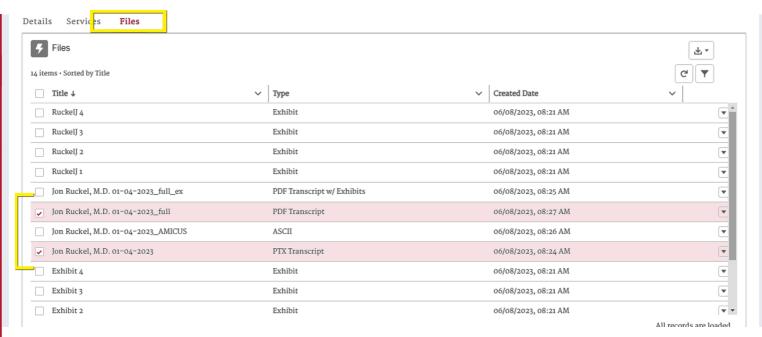
The **FILES** tab contains job exhibits, PDF transcript files, ASCII files, and more - all of the files for the delivered job. Click inside the headers to sort by file Title, file Type, or Created Date.

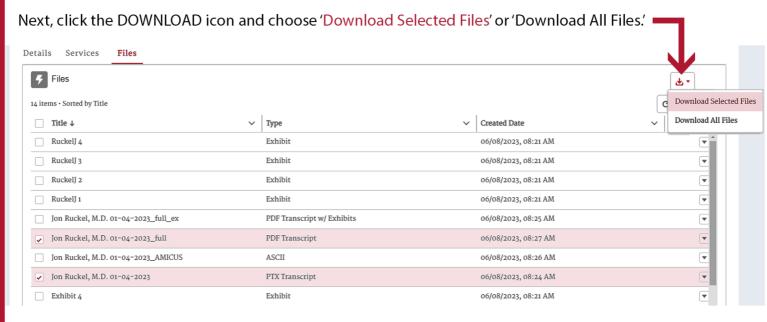




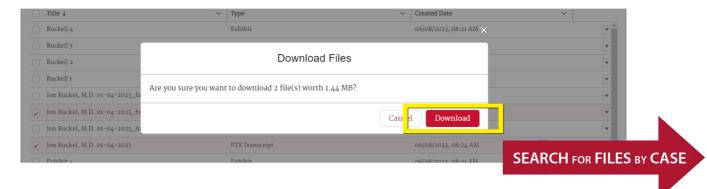
FILES TAB: Downloading Files

Simply click to checkmark the box next to TITLE to choose all files, or click box(es) next to individual files you wish to download.





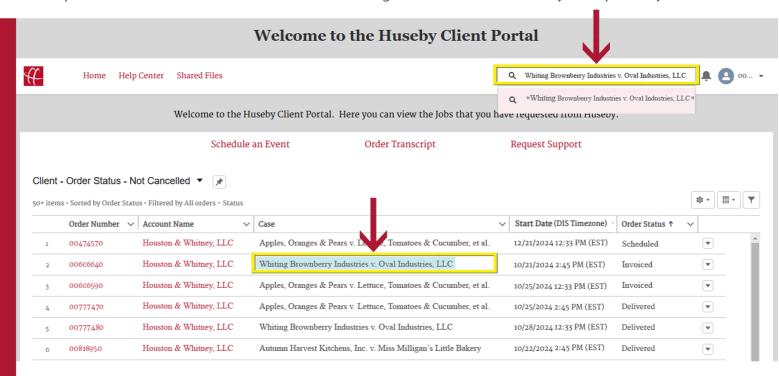
Next, click the **DOWNLOAD** button.



SEARCH FOR FILES BY CASE NAME

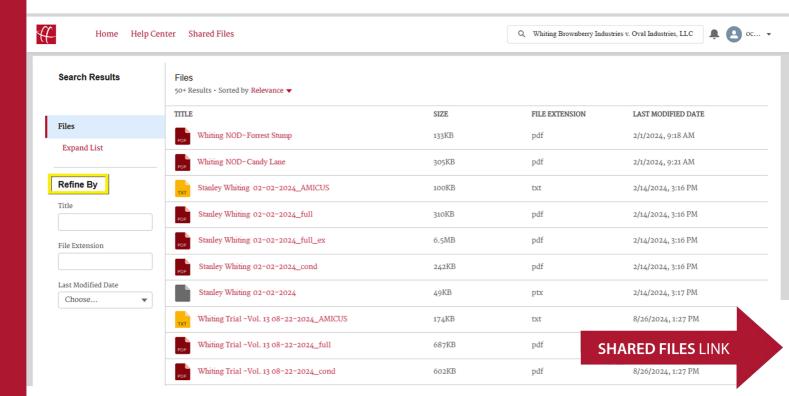
Use the search box to search for case-specific documents.

EXPERT TIP! You can copy a case name from the CASE column (*visible in certain Client-Order 'views'*), then paste it into the search box - for ease in matching the case name(s) in our system, precisely.



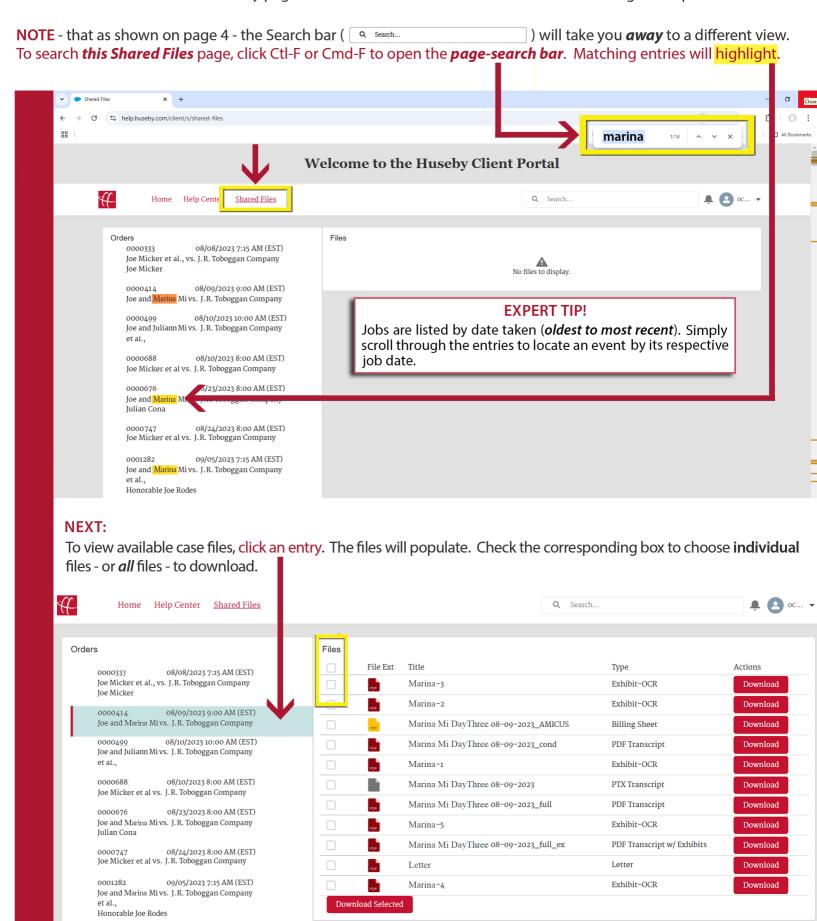
SEARCH RESULTS:

All documents for that case will populate. Click a file name to view it and/or download it. Use the REFINE BY fields to narrow the list by TITLE, FILE EXTENSION, or LAST MODIFIED DATE.



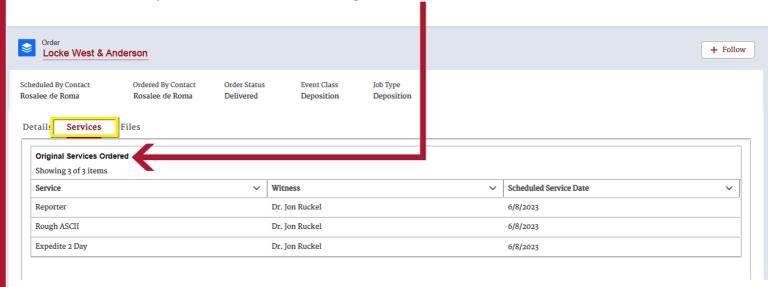
THE SHARED FILES LINK

Click the SHARED FILES link from any page within the Client Portal for another case files navigation option.

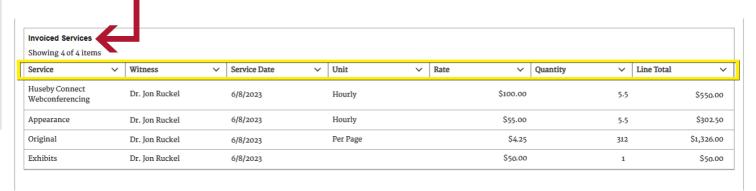


SERVICES TAB

The SERVICES tab provides details about 1) Original Services Ordered; and



2) Invoiced Services, for past/invoiced jobs.



Here in the **Invoiced Services** area, you'll find **line item details**:

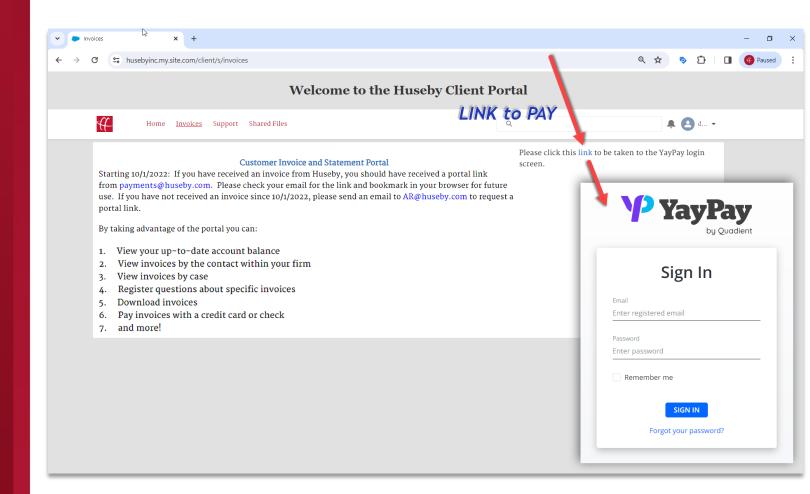
- Service type of service or product
- Witness witness name
- Service Date
- Unit Type hourly, per page, per session, etc.
- Rate rate per unit
- Quantity amount of units
- Line Total rate x quantity

INVOICES



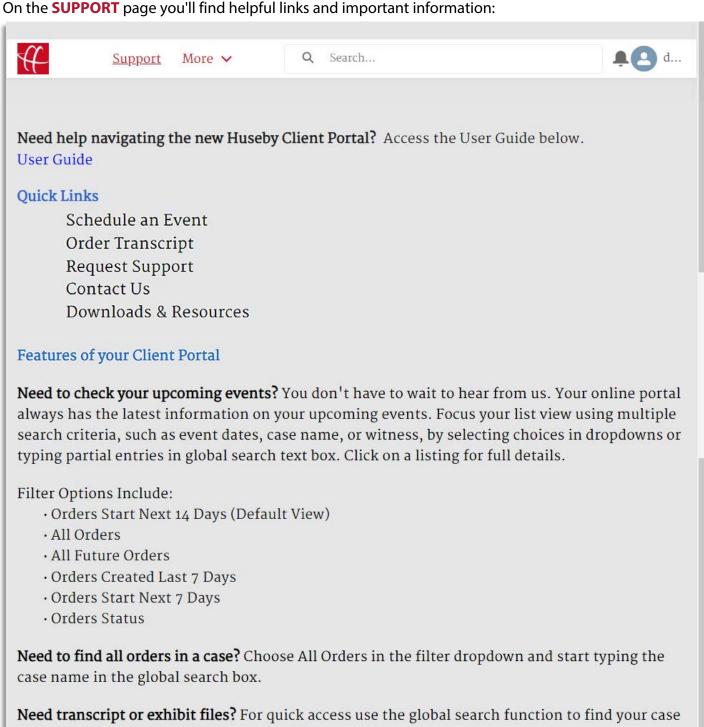
Click the **INVOICES** tab, then sign-in to **YayPay** to:

- 1. View your up-to-date account balance;
- 2. View invoices by the contact within your firm;
- 3. View invoices by case;
- 4. Register questions about specific invoices;
- 5. Download invoices; and
- 6. Pay invoices with a credit card or check.



SUPPORT





800.333.2082, ext. 6001

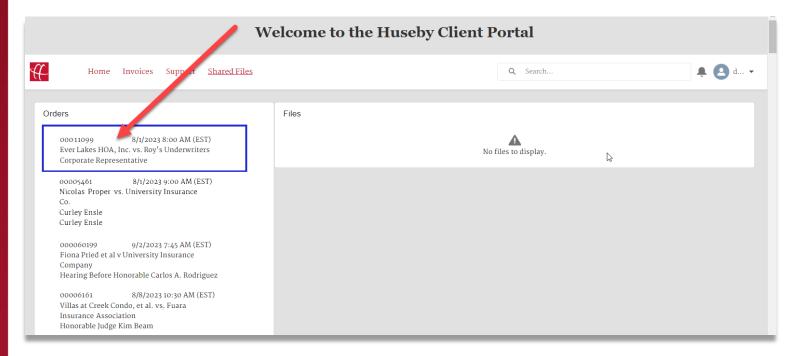
and select the order to access your case files.

For additional assistance, email Support@huseby.com

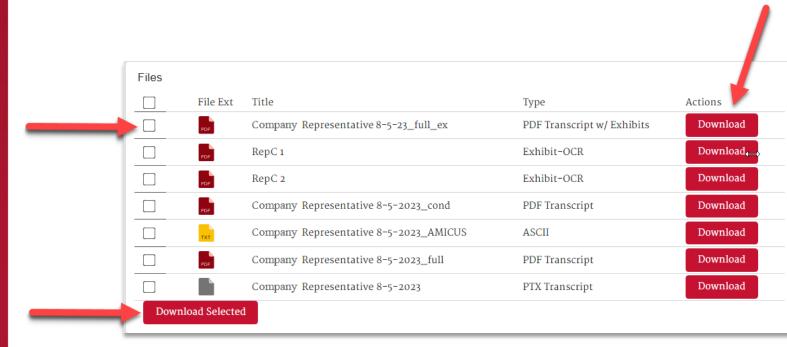
SHARED FILES



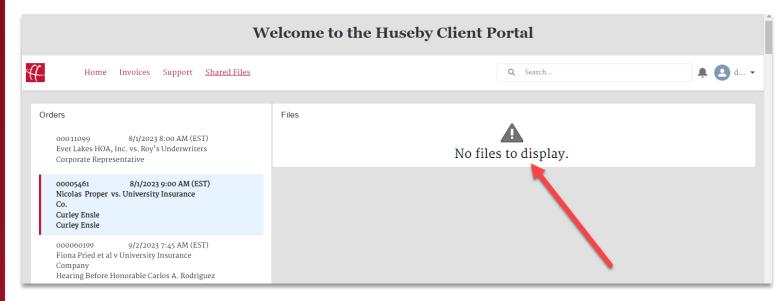
In the **SHARED FILES** area, click an **ORDER** to view associated files:



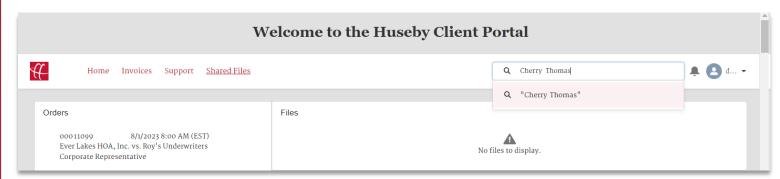
The files for that order will display. To **DOWNLOAD** one file, click the **DOWNLOAD BUTTON** to the right of that file name. To download 2 or more, checkmark each, then click **DOWNLOAD SELECTED**.



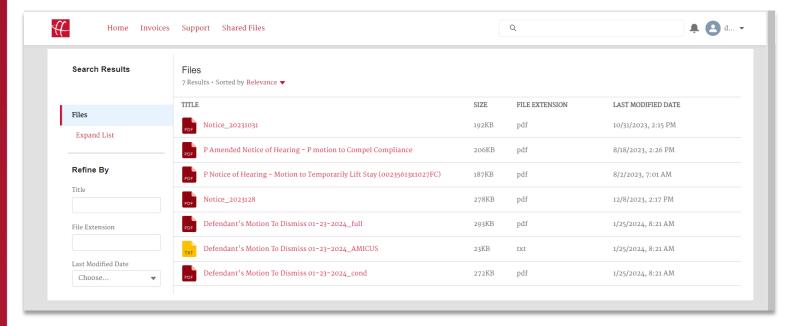
If there are no files for an ORDER, 'NO FILES TO DISPLAY' will appear in the file area.



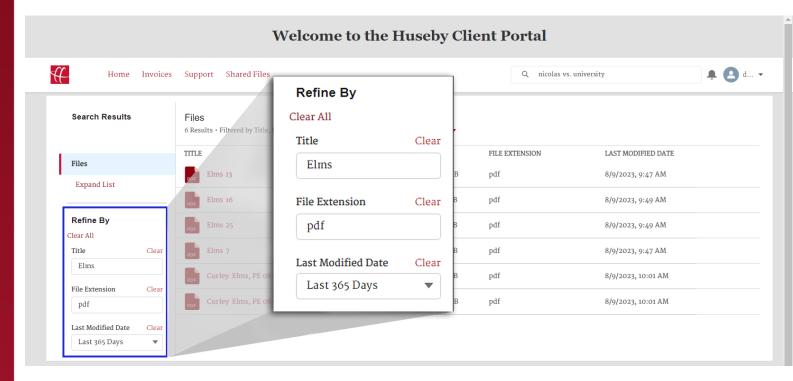
SEARCH for file(s) by *case name* or *witness* in the search box.



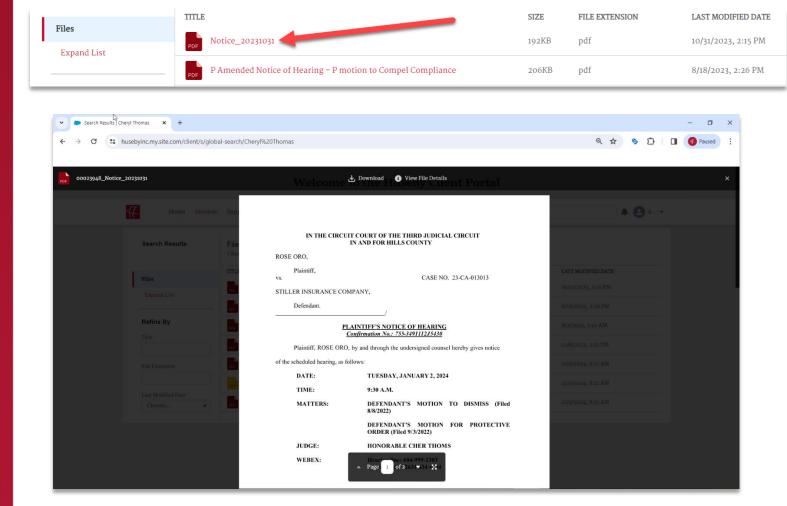
The associated files will appear.



You can REFINE SEARCH by TITLE, FILE EXTENSION, or LAST MODIFIED DATE.

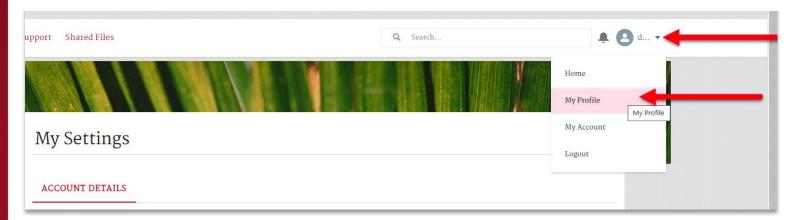


PREVIEW a document by clicking the file name.

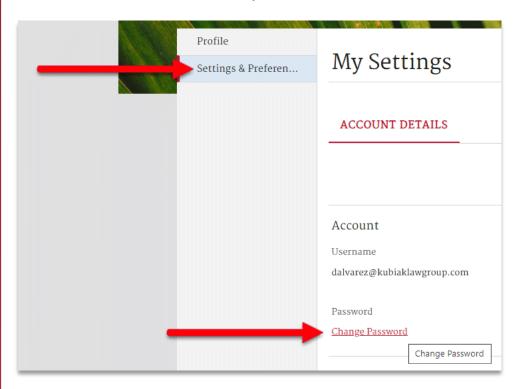


CHANGING YOUR PASSWORD

Click the *drop-down next to your account name*, then click **MY PROFILE**.



Choose **SETTINGS & PREFERENCES**, then click **CHANGE PASSWORD**.

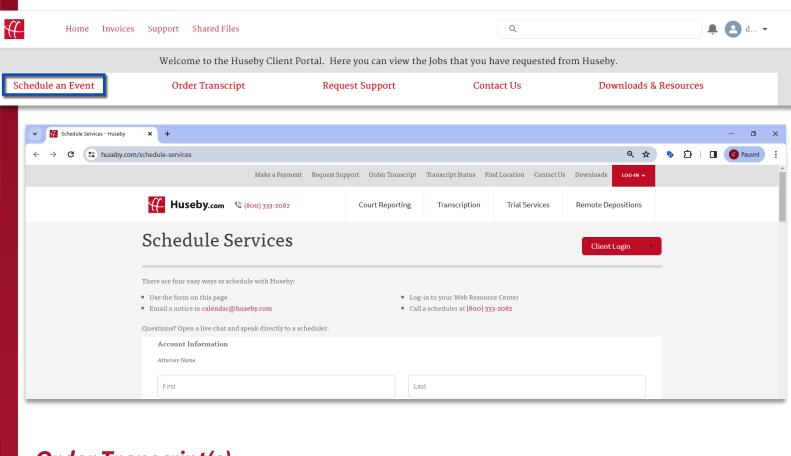


Create your new password, then click **SAVE**.

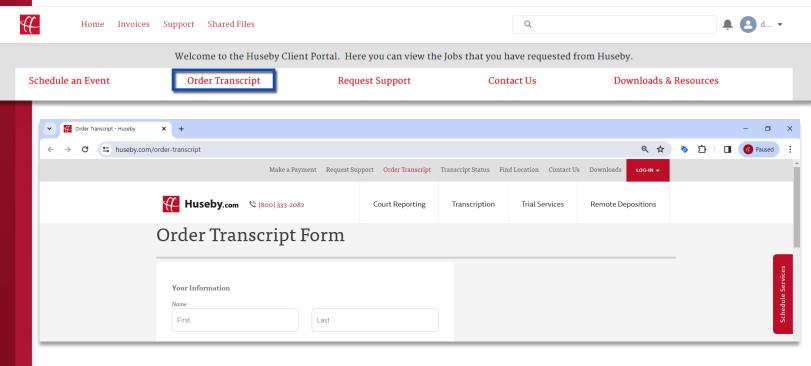
	You must adhere to the following	password rules:	
	* Your password must be at least	8 characters long.	
	* Your password must include let	ters and numbers	
k	Current Password		
	New Password		
	Verify New Password		

IMPORTANT LINKS Your client portal includes important links:

Schedule an Event



Order Transcript(s)



Request Support

