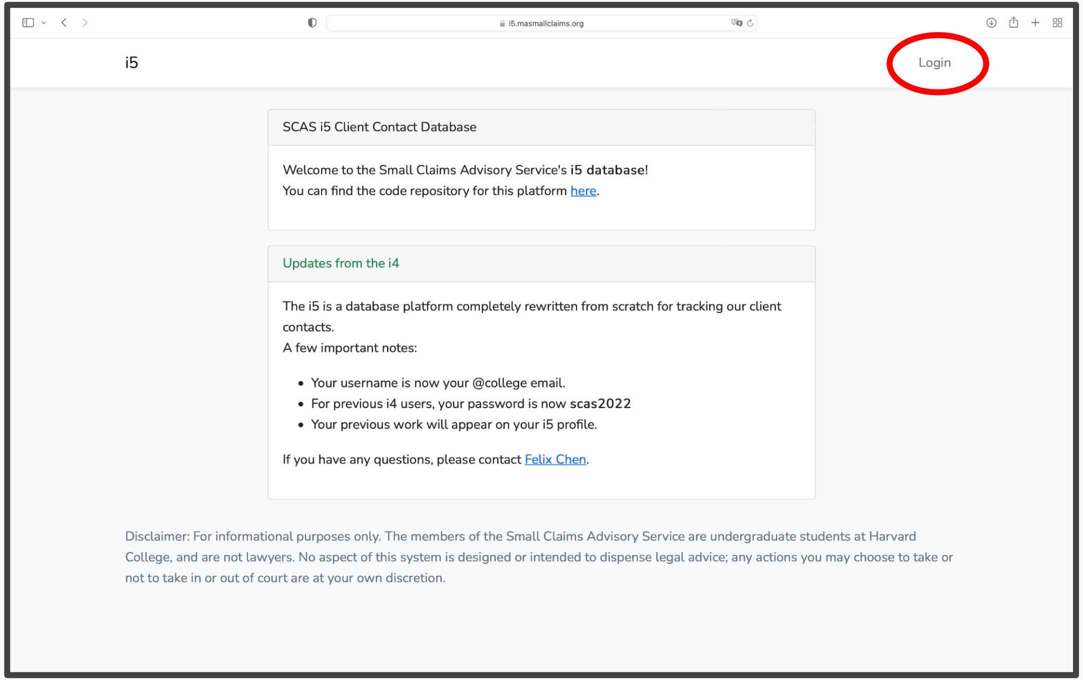
i5 User Guide

Homepage

Click **Login** in order to access your account.

Username: your college email address

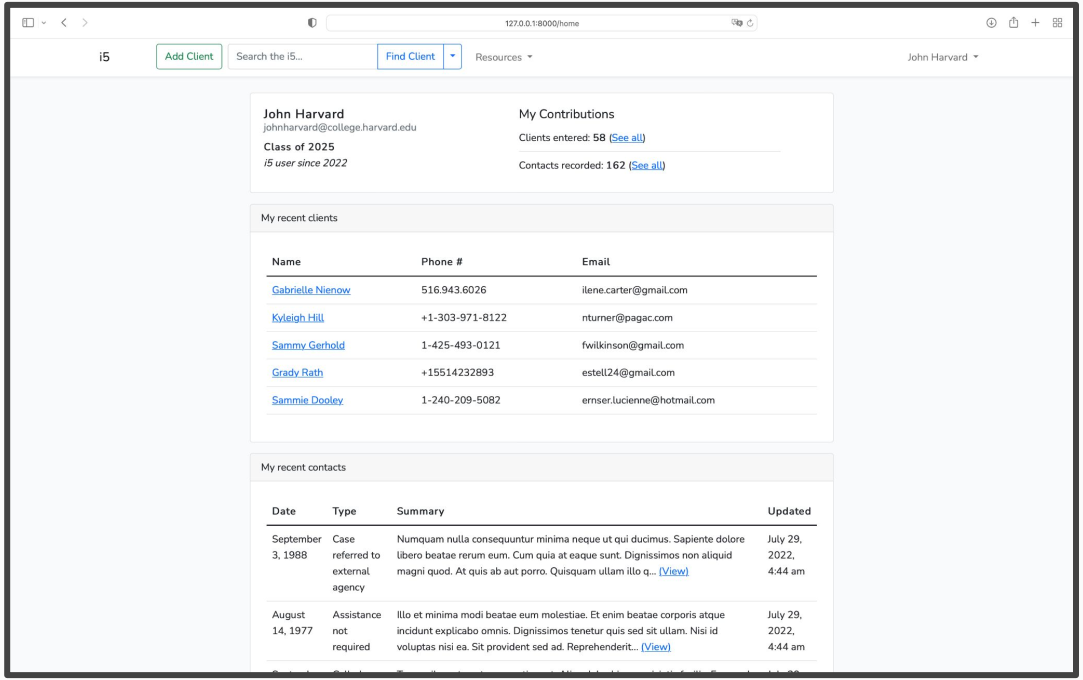
Password: **scas2022**



Dashboard

Here you can track your progress, view recent clients and contacts, and your overall contributions.

Note for previous i4 users: you may see your progress is not completely up to date: we are in the process of moving previous cases and clients over.

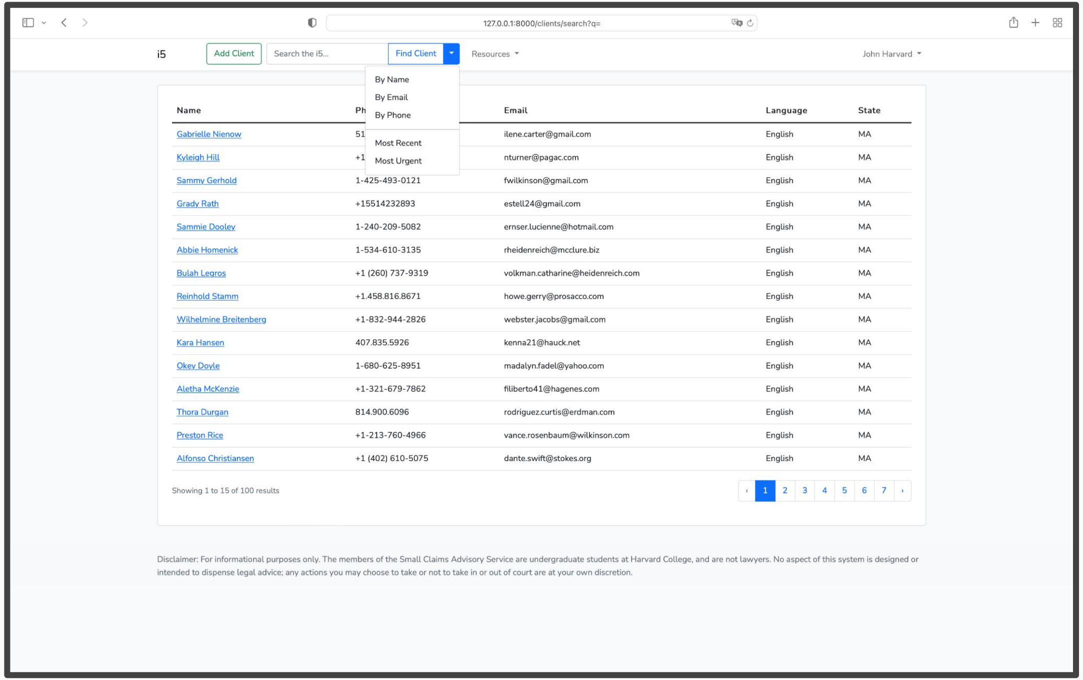


Searching Clients

Before adding a client, go ahead and look them up using the search bar.

You can search by name (firstname ***or*** lastname ***or*** firstname last name ***or*** lastname, firstname), by phone number, or by email.

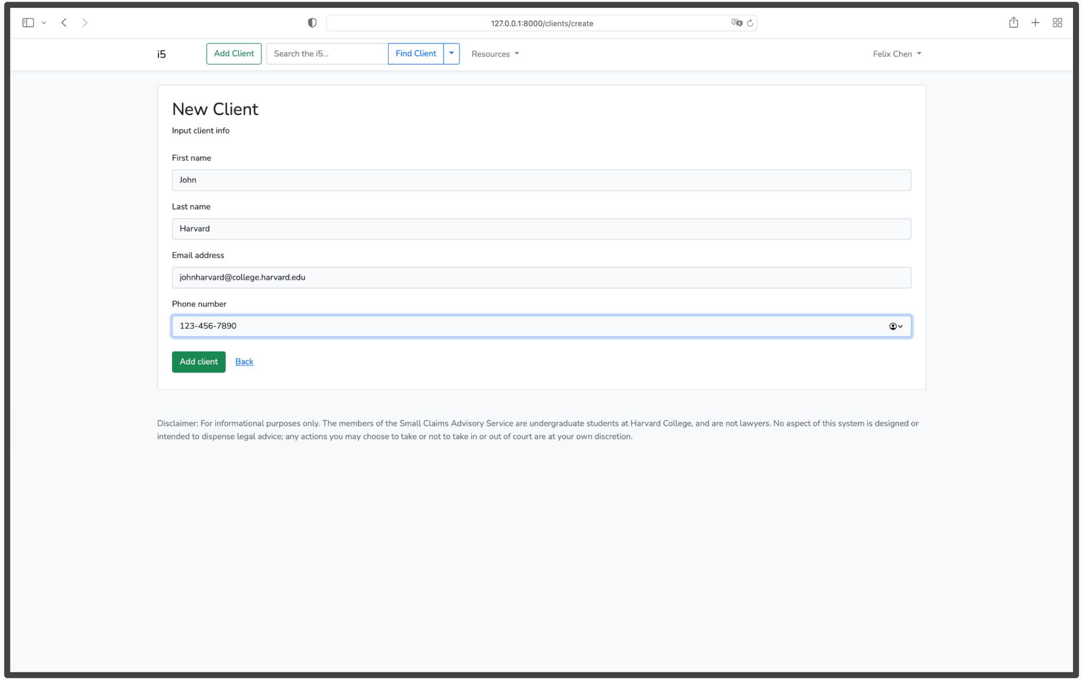
Use the dropdown menu if you would like to limit the search to only one mode. By default it will search name, phone number, and email for matches.



Adding Clients

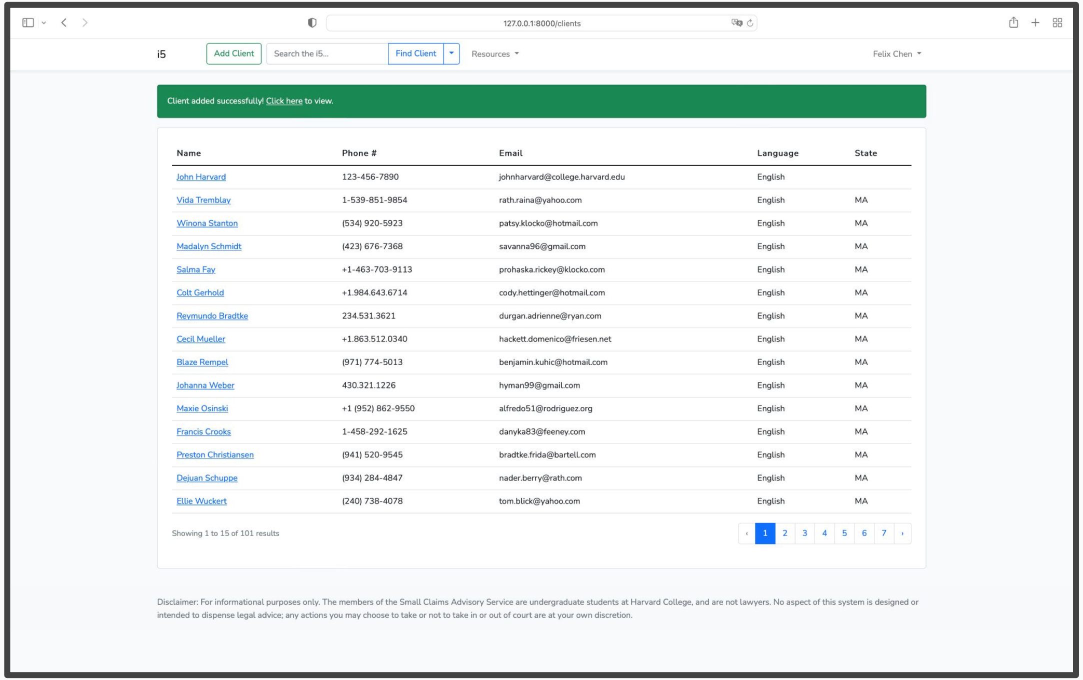
If you find a client, you can click on their name, which will take you to their information page.

If you don't see the client's existing entry, you can click **Add Client** on the navigation bar on top to input their information.



Adding Clients

After doing so, it will take you back to the clients page, with a message that the client entry has been started. To view, use the **Click here** link.

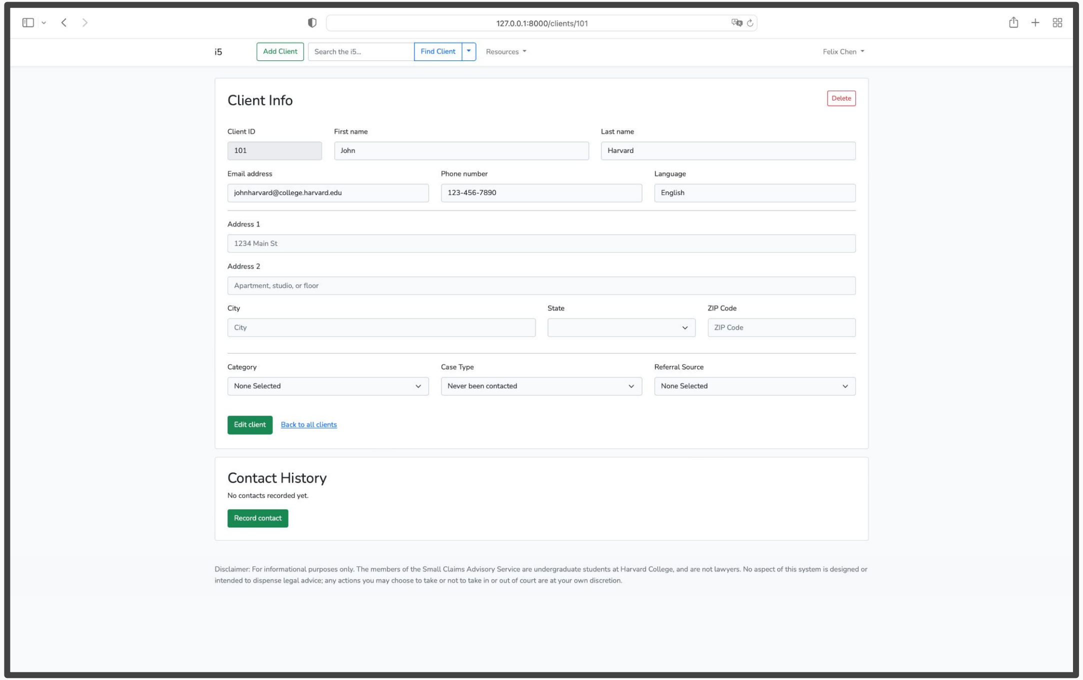


Adding Clients

This will lead you to the page for that specific client.

Here you can update any necessary details for the client. Be sure to click the **Edit client** button for your changes to save.

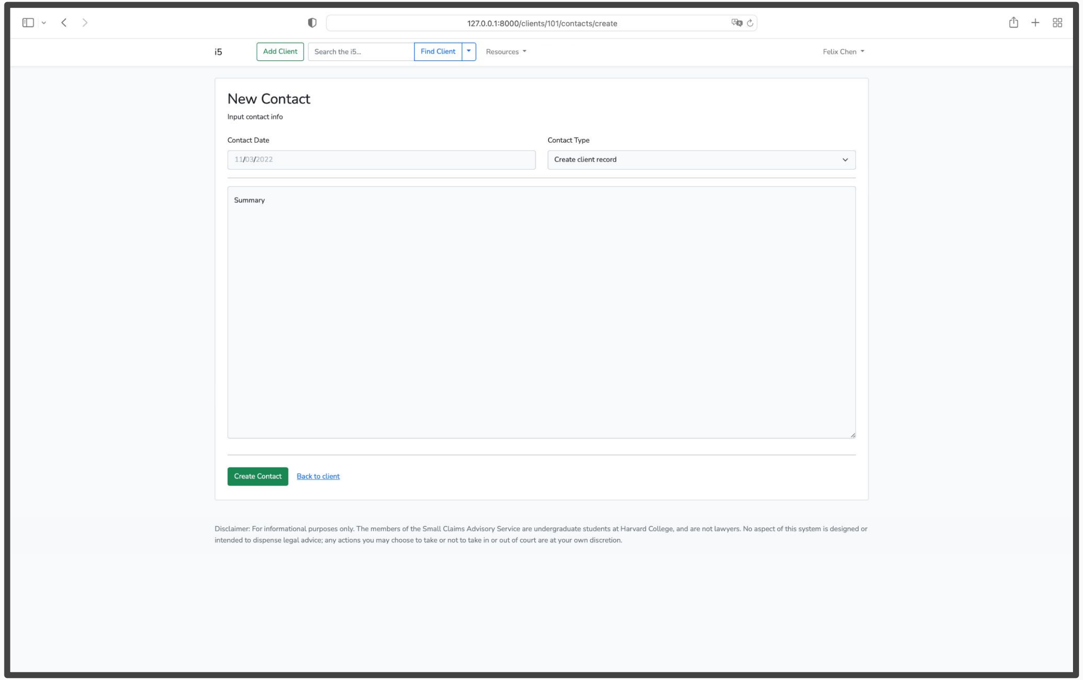
At the bottom of the client page will be a summary of past contacts with this client. If there are none, only the **Record contact** button will appear.



Adding Contacts

Clicking **Record contact** button will take you to the new contact page.

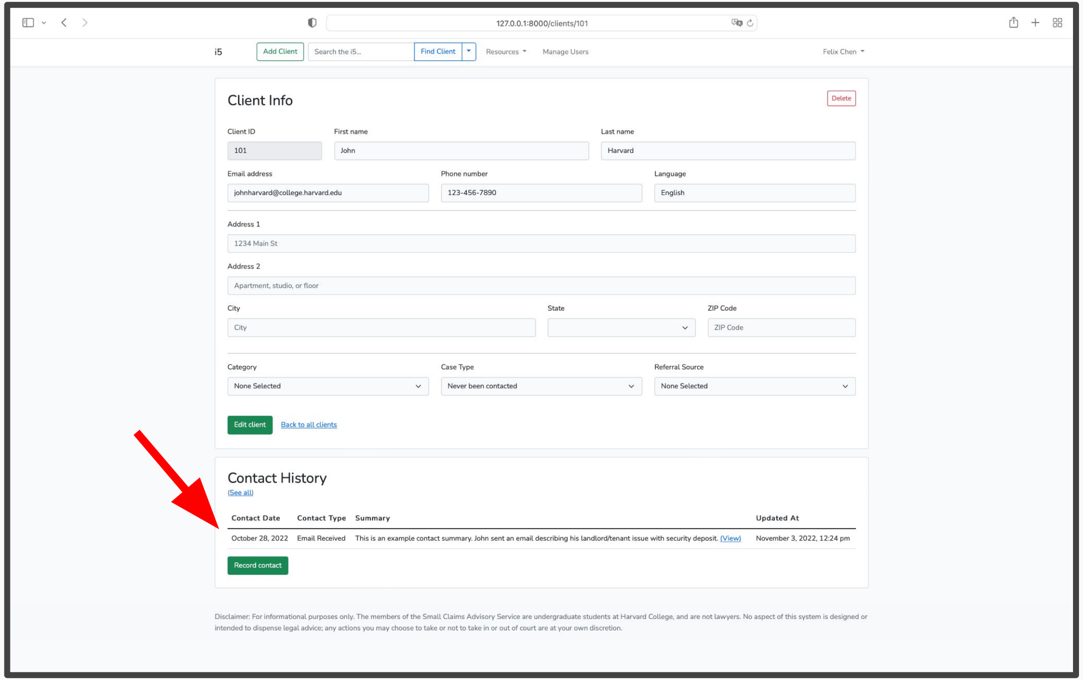
Here you can input the contact date, type of contact, and a summary of the contact.



Adding Contacts

After clicking Create Contact, you will be returned to the client page, where you can add more contacts or edit any previously entered information. The newly entered contact summary should appear at the bottom of the page.

This progress will also appear on your dashboard, in case you want to quickly return to your previous work the next time you log in to the i5.



Resources

On the top navigation bar, you can quickly reference the **Resources** dropdown list, which includes the following:

1. User Guide, a link to this presentation
2. SCAS Wiki, wiki.masmallclaims.org, where you can look up small claims law
3. Office Guide, which explains the proper response process for volunteers