MR Connect User Guide

for attorneys, paralegals, & secretaries

version 9.00

For current information on OMTI and MetaRecords software and services, visit www.omti.com.

MR Connect User Guide

Table of contents

Program Basics

MR Connect is an online service that works within a browser on your desktop, laptop, or tablet. There is nothing to install on your own hardware.

Familiarize yourself with MR Connect with these basics first:

- Log in
- Interface
- Help
- Personal options

NOTE: Automatic time-out

MR Connect automatically times out after 20 minutes. Online timeouts are required for security reasons. MR Connect does not save your work or remember which functions you were using. Be sure to **save frequently and especially before switching to a different a function or leaving your desk.**

Attention

Attention lists all of your open orders that require your attention. You can easily see what each order's status is and what needs to be done. You can send a quick message to the person on our end assigned to the order instructing them how to proceed.

Step-by-step instructions

- Managing orders that require your attention

Orders

View the current status of each part (location) of an order. Download and review records that have been obtained.

Reference

- Part

Step-by-step instructions

- Viewing order status & downloading retrieved files

Account Activity

See at a glance which invoices have been paid and what you still owe. Filter invoices by date, contact, invoice or order number, case, patient/subpoenaed witness name, or client matter number. View all invoices — or only paid or unpaid invoices. Review the details of any invoice. Download copies of invoices. Pay any outstanding invoices online.

Step-by-step instructions

Repository

Repositories are where downloadable files are stored. Search for your files in case and firm repositories. Download files to view, archive elsewhere, or email.

Step-by-step instructions

- Searching case repositories
- Downloading & viewing case files
- Searching & downloading files from firm repositories

Online Orders

Make online requests for records, process serving, or other services. Include information about the case, patient/subpoenaed witness, scheduling/billing client, records locations, and parties to the case. Upload relevant files. Update some details.

Step-by-step instructions

Support Tickets

Ask questions and get answers while maintaining a paper trail of your issues.

Step-by-step instructions

- Asking for help & other information
- Following up on support tickets
- Replying to support ticket reponses
- Customizing messages
- Closing support tickets
- Re-opening support tickets

Reward Points

Redeemable **Reward Points** are earned from booking certain services with us. You can use your points yourself or transfer them to someone else in your company.

Step-by-step instructions

- Viewing reward points
- Redeeming reward points
- Transferring reward points

Your personal options

Update your contact information; view the dashboard; change your login name, password and other preferences; access the user guide; or log out of the program.

Log in

MR Connect is a secure website that follows general security rules for business applications. Access to MR Connect is through our web address in a browser using your assigned credentials. If you do not have access, contact us.

MR Connect is optimized to work in all of the common browsers in the following order:

Step-by-step instructions

- Logging in
- Setting your password at log-in

MR Connect interface

MR Connect has a simple interface to make it easy to navigate and load as fast as possible over the internet.

Help

Contextual help is always available from the menu bar by clicking **Help.** The entire MR Connect user guide is accessible here, but initially the information that is most relevant to the currently open and active function appears.

Managing orders that require your attention

See open orders that require your attention and what needs to be done. Send a quick message instructing us how to proceed with the order.

1. In the Attention screen, all open orders that require your attention are listed. To limit the orders shown, use one or more search filters in the **Search By** pane:

   - **Contact**

     Default is ALL of the contacts in your firm. To find outstanding orders for a specific person, click . Then click a hyperlinked name in the **Lookup Contact** panel to select it.

   - **Case Name**

     To find orders for a specific case, enter part of the case name into the field.

   - **Records Of**

     To find orders for a specific patient — or witness if this is a subpoena — enter part of the person's name.

   - **Part Order Date From/Part Order Date To**

     To find orders with parts ordered within a specific time period, enter dates or click to select dates in Date Navigator.

   - **Order No.**

     Enter the entire order number.

2. Click . All orders that meet the search criteria appear.

3. Click next to a **Contact** name to send a quick message to the person on our end who is in charge of this order.

4. In the **Send Message** pop-up, enter a ***Subject** and your ***Message,** then click **Send.** If you want to format your message or add hyperlinks, see Customizing messages.

5. In the popup that appears, click **OK.**

Reference

- Date Navigator

Step-by-step instructions

- Customizing messages

Part

A part of an order is a separate record that is being sought that is included in the entire body of records for a case or patient.

Step-by-step instructions

- Viewing order status & downloading retrieved files

Viewing order status & downloading retrieved files

Find orders using various search criteria. View the current status and other details of existing orders. View the status of order parts, such as patient records. Download files that have been received.

TIP: Use shortcuts to view an order directly

MR Connect lists your most-recent orders in the Dashboard so you can access those orders by clicking:

- A hyperlinked Order No. in the **Top 10 Recent Orders** pane.
- A hyperlinked Order.Part No. in the **Top 10 Recent Received Records** pane.

1. **Set search criteria**
    1. Click:
        - **Orders** in the main menu.
        - In the **Dashboard:**
            - **More >** in the **Top 10 Recent Orders** header.
            - **More >** in the **Top 10 Recent Received Orders** header.
    2. In the Order window's **Search By** pane, no specific filter is required but you must use at least one:
        - **Contact**

          Default is ALL. To limit results to your orders, click then click your hyperlinked name in the **Lookup Contact** panel to select it.
        - **Case Name**

          Enter part of a case's name.
        - **Records Of**

          Enter part of a patient's name — or witness if this is a subpoena.
        - **Order Date From/Order Date To**

          Enter a date range, if desired (see Date Navigator).
        - **Order No.**

          Enter the entire order number.
        - **Client Matter No.**

          Enter the entire client matter number.
2. **View results**
    1. Click . All orders that fit the search criteria appear in the results pane.
    2. Click a hyperlinked **Order No.** to view details and download files.
    3. In the Order detail window, current information about the order appears in the **Order Information** pane.

       If you want to save/print the order's notes, click in the **Notes** pane. See Exporting & printing results.
    4. In the **Parts** pane, the current status of each part of the order is listed. If any files have been received from the locations listed, they appear in sublists below each location. To download:
        - **A single file** – Click the file's hyperlinked **File Description.**

- **One or more files** – Check the file(s) box(es). Then click .
- **All files** – Click **> Check All Files.**

5. If this is the first time you are downloading a file, a popup will ask if you want to set the file's Reviewed Date. Click **Yes** to have MR9 record the date and time you downloaded the file in the **Review Date** column of the **Parts** pane.

   TIP: You can update a file's reviewed date

   If you download a file more than once, MR9 does not record the date and time you last downloaded the file if you have already marked it as reviewed. To update a file's recorded date and time, click the in the **Review Date** column before downloading the file again to clear the previous date and time.

6. If the **Select Invoice to Pay** panel appears, you must pay for the file in full before you can download it. With the invoice selected, click **Next.** See Paying invoices online.
7. If you want to save/print part information, click in the **Parts** pane. See Exporting & printing results.

Reference

- Part
- Dashboard
- Date Navigator

Step-by-step instructions

- Paying invoices online
- Exporting & printing results

Viewing account activity

See which invoices have been paid and what you still owe. Filter invoices by date, attorney, case name, patient/subpoenaed witness, or client matter number. Review the details of any invoice. Pay any outstanding invoices online.

1. To see and pay invoices, click:
   - **Account Activity** in the main menu.
   - **More >** in the **Total Payables** header in the Dashboard.
2. In the Account Activity window, any invoices with outstanding balances are listed chronologically, oldest first.
3. To narrow the results or see other invoices, use one or more search filters in the **Search By** pane:
   - **Contact**

     Default is ALL. To find invoices for a specific person, click . Then click a hyperlinked name in the **Lookup Contact** panel to select it.
   - **Account Status**

     Select an option in the drop-down:
     - **ALL** – To view both outstanding and paid invoices.
     - **Show Open Invoices Only** – Default. To view only outstanding invoices.
     - **Show Paid Invoices Only** – To view only paid invoices.
   - **Date Type**

     Select an option in the drop-down:
     - **Invoice Date** – Default. To see invoices by billed dates.
     - **Order Date** – To see invoices by their related orders' dates.
   - **Date From/Date To**

     Enter dates or click to select dates in the Date Navigator.
   - **Invoice No.**

     To see a specific invoice, enter its invoice number.
   - **Order No.**

     To see the invoice for a specific order, enter its order number.
   - **Case**

     To see invoices for a specific case, enter part of the case name.
   - **Records Of**

     To find invoices related to a specific patient — or witness if this is a subpoena — enter part of the person's name.
   - **Client Matter No.**

     To see invoices for a specific client matter number, enter the client matter number.
4. Click .

5. All potential matches to your search criteria appear in chronological order, oldest first. To:

   - **Change the order of the invoices –** Click the heading of the column you want to sort the rows by. Click the column header again to reverse the sort order.
   - **Export and/or print the results –** See Exporting & printing results.
   - **View information about an invoice or download its PDF version –** See Viewing invoice details.
   - **Pay an invoice –** See Paying invoices online.

Reference

- Dashboard
- Date Navigator

Step-by-step instructions

- Exporting & printing results
- Viewing invoice details
- Paying invoices online online

Viewing invoice details

View an invoice’s details and download a PDF of the invoice.

1. To find an invoice, see Viewing account activity.

2. Click an invoice’s hyperlinked invoice number to view information about the invoice or download its PDF version.

3. In the Account Activity > Invoice window, no fields are editable. You can view details, export results, download files, and pay the invoice. Scroll or jump to:

   - **Order**

     To see the invoice’s related part number, order date, status, case name & number, requested record details, and scheduling firm/contact.

   - **Invoice**

     To see the invoice’s number, date, amount, current balance, late charges, finance charges, paid date, sold to firm/contact, bill to firm/contact, name of insured, insurance claim number, client matter number, date of loss, reference number, and information about records received (date received, record type, and nymber of pages).

   - **Payment History**

     To see any payments already credited to the invoice.

   - **Repository**

     To download the invoice PDFs. Check files’ boxes to select them, then click .

4. To export and/or print the results in a pane, see Exporting & printing results.

Step-by-step instructions

- Viewing account activity
- Exporting & printing results

Paying invoices online

Pay invoices (including COD invoices) online using credit cards.

1. To find an invoice or invoices to pay, see Viewing account activity.
2. In the Account Activity window’s results pane, check the box next to each invoice you want to pay. Or check the **Pay** box at the top to select all of the listed invoices.
3. Click **Pay Invoice(s).**
4. In the payment detail window, the invoice(s) you selected to pay are listed in the **Invoices to pay** pane with the total amount at the bottom of the pane. This is the amount that will be charged to your credit card.
5. In the **Credit Card Information** pane of the payment detail window, enter your credit card details:
   - ***Card Number**

     Required. Enter the number issued to your credit card.
   - ***Expiration Date (month/year)**

     Required. Select the 2-digit month and 2-digit year your card will expire in the drop-downs.
   - ***CVV**

     Required. Enter your credit card’s 3- or 4-digit Card Verification Value code.

   TIP: Save time by automatically entering credit card information

   Save time and avoid errors by using the **Autofill link** option in the ***Card Number** field instead of manually entering your credit card information. See Autofilling credit card information.
6. In the **Billing Information** pane, enter/edit the information so that it matches your personal information on your credit card account: by one of these ways:
   - Click the **Same as my profile** slider to select Yes to have the fields filled with the information from your **My Profile** page (see Updating your contact information).
   - If you had Link autofill your credit card information, it automatically filled in your billing information.
   - Manually enter your billing information:
     - ***First Name**

       Required. Your given name.
     - ***Last Name**

       Required. Your family name.
     - ***Email**

       Required. Your email address
     - **Address**

       Street address only of your credit card billing address. City, state and zip code have their own fields/drop-downs. 2nd line is optional.
     - **City**

       City of your credit card billing address.
     - **State**

       Abbreviation of the state of your credit card billing address. Select from the drop-down.

- ***Zip**

  Required. Postal code of your credit card billing address.

7. In the **Invoices to pay** pane, check that you have selected the correct invoice(s) you wish to pay.

8. Click **Pay.**

Reference

- Link

Step-by-step instructions

- Viewing account activity
- Autofilling credit card information
- Updating your contact information

Searching case repositories

Search for files tied to your orders/cases in your case repository. Use filters to narrow results returned.

1. Click **Repository** in the main menu.
2. In the Repository window's **Search By** pane, Case Repository is the default in the **Repository Type** dropdown. Use other filters, if desired, to narrow your search:
   - **Contact**

     Default is ALL. To limit files to one contact, click then click the hyperlinked name in the **Lookup Contact** panel to select it.
   - **Case Name**

     To limit files to one case, enter part of the name of the case.
   - **Case No.**

     To limit files to one case, enter the entire number of the case.
   - **Order No.**

     To find files related to a single order, enter an order number.
   - **Records Of**

     To find files related to a single patient/subpoenaed witness, enter part of the person's name.
3. Click .
4. All files that fit the search criteria are listed. Click a hyperlinked **Order No.** to access related files.
5. In the selected order's window, all of the files related to the order appear in the **Files** pane. If you want to limit the results shown, use one or more filters in the **Search By** pane:
   - **File Type**

     Default is ALL. Click to select specific type(s) to search. See Lookup panel.
   - **File Name**

     To find a particular file, enter part of the file name.
   - **File Description**

     To find a particular file, enter part of the file description.
   - **Upload Date From/Upload Date To**

     To find files by date, enter dates when the file was uploaded to the repository or click to select dates in the Date Navigator.
6. Click .
7. To save/view files, see Downloading & viewing case files.

Reference

- Lookup panel
- Date Navigator

Step-by-step instructions

- Downloading & viewing case files
- Searching & downloading files from firm repositories

Downloading & viewing case files

Download case files to view, archive elsewhere, or email. You must download a file to view it. You can download files from an order, invoice, or the Repository.

If there is an outstanding amount on the invoice associated with a file you want to download, you can pay it without leaving MR9, then download the file instantly. After downloading, open files in the associated program.

1. **Access file(s)**

   - **From the central repository**

     To find files in **Repository,** see Searching case repositories.

   - **From your dashboard**

     Click a hyperlinked order number in the **Top 10 Recent Orders** pane or part number in the **Top 10 Recent Received Records** pane.

   - **Within an order**

     In an Order window, scroll or jump to the **Parts** pane.

   - **Within an invoice**

     In an Invoice window, scroll or jump to the **Repository** pane.

2. **Download & view file(s)**

   1. Check the box(es) of any file(s) you want to download/view.
   2. Click .
   3. If a popup appears that asks if you want to set the Reviewed Date after downloading, click:
      - **Yes** – If you want to have MR9 record the date and time you downloaded the file(s) in the **Reviewed** column of the Repository results grid.
      - **No** – If you don't want MR9 to record the date and time you downloaded the file(s).
   4. If a popup appears saying the file will be available upon full payment but the invoice hasn't been created yet, click **OK** and contact our office.
   5. If the **Select Invoice to Pay** panel appears, you must pay the invoice first before you can download the file. Click **Next** in the panel and follow the instructions in Paying invoices online.
   6. When the file downloads, it's saved on your device based on your browser preferences. Depending on your browser, the file might also automatically open in the program on your device associated with each file's file type. Otherwise, locate the file on your device to open and view. If you download more than one file at a time, they will be saved together in a folder labeled with the download date on your device.

TIP: Save the latest download date & time

If you download a file that you already marked as reviewed, MR9 does not automatically update the file's **Reviewed** date and time. If you want to record the file's latest download date and time, click  next to the date and time to clear the field before clicking , then click **Yes** in the popup. MR9 will record the new date and time in the file's **Reviewed** field.

NOTE: Opening downloaded files

The file extension following the period in the file name (usually three letters like "doc" or "pdf") tells your computer which program to use to open the file. Sometimes though, when you try to open a file, a window appears asking which program to use to open the file. This happens when you do not have a *file association,* which means that either you do not have a program registered to open the file or you do not have a program that is capable of opening that type of file. You must install and/or register a program that can open these files.

Sometimes after installing a new program, the new program takes over opening certain types of files. If you want the files to open in a different program, you must change the file association of these types of files to your preferred program.

To find out how to register or change the file association, refer to your operating system's Help documentation.

Reference

- Part

Step-by-step instructions

- Searching case repositories
- Paying invoices online

Searching & downloading files from firm repositories

Search for non-case related files in your firm repository — such as contracts. Use filters to narrow results returned.

1. Click **Repository** in the main menu.
2. In the Repository window's **Search By** pane, select Firm Repository in the **Repository Type** dropdown. Use other filters, if desired, to narrow your search:
   - **File Type**

     Default is ALL. Click to select specific type(s) to search. See Lookup panel.
   - **File Name**

     To find a particular file, enter part of the file name.
   - **Upload Date From/Upload Date To**

     To find files by date, enter dates when the file was uploaded to the repository or click to select dates in the Date Navigator.
3. Click .
4. All files that fit the search criteria are listed. Check the box(es) of file(s) you want to download.
5. Click **Download.**
6. If a popup appears that asks if you want to set the Reviewed Date after downloading, click:
   - **Yes** – If you want to have MR9 record the date and time you downloaded the file in the **Reviewed** column of the Repository results grid.
   - **No** – If you don't want MR9 to record the date and time you downloaded the file.
7. MR9 downloads the selected file(s) to your device. Depending on your setup, the file(s) might open automatically in their related program.

Reference

- Lookup panel
- Date Navigator

Step-by-step instructions

- Searching case repositories
- Downloading & viewing case files

Requesting records & other services

You can submit a request with only the case, patient/subpoenaed witness, and responsible party's names, plus a location to obtain records from or serve subpoenas on. You can include additional information — such as trial details, patient/witness information, other attorneys of record, and 3rd party billing information. You can also upload related files.

1. **Start a new request**
   1. To make a new request, click **Online Orders** in the main menu.
   2. Click **New.** The New Order window opens.

   TIP: Save time by copying an existing order

   Instead of starting orders from scratch each time, copy information from an existing order into a new one, then update it. See Copying requests.

2. **Enter required info**
   1. In the New Order's **Case** pane, enter the text of the case name in the ***Style of Case** fields in the way you want it to appear on cover pages and other legal papers *(required).*
   2. Scroll or jump to the **Records Of** pane. Enter the patient's name — or witness if this is a subpoena — in ***Records Of** *(required)*
   3. Scroll or jump to the **Scheduling** pane.
   4. **Scheduling Firm** is not editable. ***Scheduling Contact** *(required) d*efault is your name. If you are not the person requesting the services, select the correct contact in the dropdown.
   5. Click **Save.** New panes for **Files, Attorneys of Record,** and **Locations** appear and the window scrolls to the **Files** pane.
   6. Before you can submit this order, you must add at least one location to the order. To designate the location, see Entering locations.

3. **Enter additional info (optional)**

   You can enter other order information, if desired. Scroll or jump to each pane:

   - **Case**

     To enter case information, such as the jurisdiction, court, and if this is a rush order, see Entering case information.

   - **Records Of**

     To enter information about the patient — or witness if this is a subpoena — such as personal ID numbers, address, and relevant dates, see Entering patient information.

   - **Scheduling**

     To change the contact responsible for requesting this service and enter who the law firm is working for, see Updating scheduling contacts.

   - **Billing**

     Depending on who is financially responsible for this request, set **Same as Scheduling** to:

     - **Yes** — If you are responsible for the order's invoice.
     - **No** — Default. If you are not responsible for the invoice, see Entering third-party billing information.

- **Files**

  To send files along with the request, see Uploading files. You can also send files for this order later.

- **Attorneys Of Record**

  You are automatically listed as the ordering attorney in your online requests. To enter or change attorney of record information, see Adding attorneys of record.

- **Locations**

  To designate, update, or delete a location where records are or where the subpoena is to be served, see Entering locations.

4. **Save request**

   To save your work but not submit your request, click **Save >**

   - **Save & Edit** – To continue working on the same request.
   - **Save & Close** – To save your work and close the window.

5. **Send request**

   When your order is complete, review your request, then click **Submit Order.** Our office will receive an alert notifying us of your request.

   When we import your request into our system, you can track its progress in Orders. See Viewing order status & downloading retrieved files.

   NOTE: Save vs Submit Order

   You can save your work at any time. We won't receive your request until you actually submit it. If you are not ready to send your request to us — for example you are waiting for more information — you can keep your request editable by saving it instead.

   Once you have submitted an order, you can't update information in any pane except **Files, Attorneys of Record,** and **Locations.** See Updating service requests. If you need to make other changes to the request after submitting it, please contact us.

Reference

- Orders

Step-by-step instructions

- Copying requests
- Entering locations
- Entering case information
- Entering patient information
- Updating scheduling contacts
- Entering third-party billing information
- Uploading files
- Adding attorneys of record
- Updating service requests
- Viewing order status & downloading retrieved files

Viewing & updating your orders

Find your orders using various search criteria to view their details, upload files, update requests, and request new orders.

1. **Set search criteria**
    1. Click **Online Orders** in the main menu. Any incompleted orders made by people at your firm appear so you can easily access these orders to finish and submit.
    2. To narrow the results or find other orders, use the filters in the **Search By** pane:
        - **Contact**

          Default is ALL. To limit results to your orders, click then click your hyperlinked name in the **Lookup Contact** panel to select it.
        - **Case Name**

          Enter part of a case's name.
        - **Records Of**

          Enter part of a patient's name — or if this is a subpoena, part of the witness name.
        - **Order No.**

          Enter the entire order number.
        - **Client Matter No.**

          Enter the entire client matter number.
        - **Order Status**
            - **ALL** – To search all of your firm's outstanding orders.
            - **Incompleted** – Default. To see your unfinished requests.
2. **View results**
    1. Click . All orders that fit the search criteria appear in the results pane.
    2. Click a hyperlinked **Order No.** to:
        - View details.
        - Upload files.
        - Update information.
        - Copy the order to create a new one.
    3. To request new services, see Requesting records & other services.

Step-by-step instructions

- Viewing order details
- Uploading files
- Updating service requests
- Copying requests
- Requesting records & other services

Asking for help & other information

If you have the option, you can ask questions and make requests online with Support Tickets. After making an inquiry, you can track its resolution and continue the discussion with us online.

1. To make an inquiry, click **Support Tickets.**
2. In the Support Tickets window, any unresolved inquiries are listed (see Following up on support tickets). To start a new ticket, click **New.**
3. In the Support Tickets > New Ticket window, enter the following information:
    - ***Subject** – *Required.* A descriptive title for your inquiry will make it easier to track if you have multiple inquiries.
    - ***Problem/Question** – *Required.* A detailed description will help us understand your inquiry and resolve it sooner. If you want to format your message, or add hyperlinks and images, see Customizing messages.
4. Click **Send.**
5. To see answers and respond, see Following up on support tickets.

Step-by-step instructions

- Following up on support tickets
- Customizing messages

Following up on support tickets

After making an inquiry using Support Tickets, track its resolution and continue the discussion with us online. When the issue has been resolved, close the ticket. Re-open closed tickets to resume the conversation.

1. To find tickets, click **Support Tickets** in the main menu.

2. In the **Search By** pane, **Ticket Status** defaults to Open with any currently unresolved tickets listed.

   - **Ticket Status**
     - **Open** – Default. Support issues that have not been resolved yet. Open tickets include:
       - **Awaiting Response:** We have not replied to your issue yet.
       - **Pending Customer Response:** We have sent a reply and are awaiting your response.
     - **Closed** – Tickets you have determined are resolved and rated the performance, or that were otherwise closed. Closed tickets include:
       - **Closed:** You have finished with the issue and rated our response.
       - **Solved:** We have determined that the issue is resolved.
   - **Issued Date From/Issued Date To**

     Closed Status only

     Enter a date or date range to see tickets initiated within those dates. See Date Navigator.

3. Click . All of the support tickets that meet the specified search condition(s) from the newest to the oldest appear.

4. Click the hyperlinked **Ticket No.** of a ticket you want to follow up on.

5. Your follow-up options:

   - To view comments & reply to a ticket, see Replying to support ticket reponses.
   - To close a ticket and rate our response, see Closing support tickets.
   - To re-open a closed ticket to continue the discussion, see Re-opening support tickets.

Reference

- Date Navigator

Step-by-step instructions

- Asking for help & other information
- Replying to support ticket reponses
- Closing support tickets
- Re-opening support tickets

Replying to support ticket reponses

View and reply to responses on support tickets.

1. To find a ticket, see Following up on support tickets.
2. In the View Ticket window, any responses to the **Problem/Question** are listed under **Threads.**
3. To continue the conversation, click **Reply.**
4. In the **Reply** panel, enter your follow-up comment in ***Message** *(required.)* If you want to format your message, or add hyperlinks and images, see Customizing messages.
5. Click **Save** to send your message.

Step-by-step instructions

- Following up on support tickets
- Customizing messages
- Asking for help & other information

Customizing messages

Customize the appearance of transcript notes or the body of messages. Add images, tables, and hyperlinks to messages.

Continued from Managing orders that require your attention, Asking for help & other information and Replying to support ticket reponses.

- **Customize appearance**

  In the **Send Message** panel (Attention) or the ***Problem/Question** pane (Support Tickets), select text to be customized, then:

  - **Bold**

    Toggle the selected text’s weight between the default and bold.
  - **Italic**

    Toggle the selected text’s style between the default and italic/oblique.
  - **Underline**

    Underline selected text, including word spaces, with a single line.
  - **Align Text Left**

    Have selected text line up on left margin only.
  - **Center Text**

    Have selected text align to a midpoint.
  - **Align Text Right**

    Have selected text line up on right margin only.
  - **Justify Text**

    Have selected text line up on both left and right margins.
  - **Insert Unordered List**

    Mark each paragraph of selected text with a bullet.
  - **Insert Ordered List**

    Number each paragraph of selected text.
  - **Indent**

    Move the selected text in from the margin in increments.
  - **Outdent**

    Move the selected text out to the margin in increments. (Will not extend past the margin.)
  - (inherited f... **Select Font Family**

    Scroll up or down the list of fonts and typefaces to select a different font for the selected text.

- **Select Font Size**

  Scroll up or down the list of default font sizes to select a different size for the selected text.

- **Color**

  Select a color in the default palette as the color for the selected text.

- **Background Color**

  Select background color in the drop-down for the text area of selected text.

TIP: Insert cursor to change entire section

Instead of highlighting a word or paragraph, depending on what customization is selected, you can simply click to insert the cursor inside the word/paragraph, then apply the customization to the whole word/paragraph at once. For example, click within a word, then click and the entire word will be bolded. Click within a paragraph, then click and the entire paragraph will be indented.

8 **Insert content**

In the ***Problem/Question** pane, insert the cursor where you want to add content, then enter text or click:

- **Insert Hyperlink**

  In the Insert Hyperlink popup that appears:

  - **Web address** – *Required.* Enter the URL address you want to link.
  - **Text** – The URL will appear in the email as a hyperlink unless you enter text you want to be the hyperlink instead.
  - **ToolTip** – Enter text you want to appear as a hint when the cursor is over the hyperlink.
  - **Open link in new window** – Check this box to have the URL appear in a new browser window when clicked.
  - Click **Insert.**
  - **To edit the hyperlink,** insert the cursor, then click .
  - **To remove the hyperlink,** insert the cursor, then click . The text will remain, but will no longer link to a URL.

- **Create a Table**

  In the Create a Table popup, either:

  - Drag across and down through the boxes to select the number of rows and columns for your table. A 100%-width table with the selected parameters will be created.
  - Click **Table Wizard** to enter table parameters in the Table Wizard popup.

- **Insert Image**

  Support Tickets only

  - Navigate to an image file (.png, .jpg, or .jpeg) on your device. Then click the new image to select it.
  - Click **Choose.**

Step-by-step instructions

- Managing orders that require your attention
- Replying to support ticket reponses

Closing support tickets

When an issue has been resolved or you no longer need it to be an active inquiry, close its ticket and rate our response. You can always re-open the ticket at a later date if you want to continue the conversation.

1. To find a ticket, click **Support Tickets** in the main menu.
2. In the **Search By** pane, **Ticket Status** defaults to Open with any currently unresolved tickets listed. If you need to restrict results, see Following up on support tickets.
3. Click the hyperlinked **Ticket No.** of a ticket you want to close.
4. In the Support Tickets > View Ticket window, click **Close Ticket.**
5. In the **Close Ticket** panel, click one of the radio buttons to rate the exchange. Then click **Save.**
6. The ticket's status changes from Open to Closed.

Step-by-step instructions

- Following up on support tickets
- Re-opening support tickets

Re-opening support tickets

You can re-open closed ticket at a later date if you want to restart the conversation.

1. If you should want to re-open a ticket and continue the conversation thread, find the ticket in your closed support tickets (see Following up on support tickets) and click its hyperlinked **Ticket No.**
2. In the Support Tickets > View Ticket window, click **Reopen Ticket.**
3. In the **Reply** panel, enter your comment/question in ***Message** *(required).* If you want to format your message, or add hyperlinks and images, see Customizing messages.
4. Click **Save** to send your message.

Step-by-step instructions

- Following up on support tickets
- Customizing messages

Viewing reward points

Check how many points you have available currently and in the future. Look up your previous point history.

1. To view your points, click **Reward Points.**

2. In the Reward Points window, **Current Points Statement** provides an overview of your points. You can quickly check:

    - **Current Balance**

      Your currently redeemable points, which are calculated from paid invoice amounts minus any already redeemed or transferred points.

    - **Pending Points**

      Points of all posted invoices that haven't been paid yet. When an invoice is paid, points earned on that invoice are automatically moved from **Pending Points** to **Current Balance** and are redeemable.

    - **Points Earned**

      Amount displayed includes all redeemable points earned since account was opened, including those already redeemed or transferred.

    - **Points Spent**

      Amount shown is all redeemed and transferred points since account was opened.

3. The list beneath **Current Points Statement** defaults to all activity in the last month. To view different activity, make selections in the **Search By** pane:

    - ***Activity Date From/*Activity Date To**

      Required. Defaults to the past 30 days. To view a different time period enter or select dates in the Date Navigator.

    - **Activity Type**

      Default is ALL. To view specific types of point activity, click . Then uncheck the **Activity Type** box in the **Lookup Activity Type** panel to clear all selections and check individual box(es) to select specific activity type(s):

        - **Earn** – Points accrued through services ordered and paid for.
        - **Adjustment** – Points added or subtracted by an administrator.
        - **Transfer** – Points gifted to or from another person (see Transferring reward points).
        - **Redeem** – Points you have applied to rewards (see Redeeming reward points).

4. Click . The list shows all points activity that matches your search criteria in chronological order, oldest transaction first. You can re-arrange the order by clicking any of the headers:

    - **Activity Type** – Categories of point transactions.
    - **Activity Date** – Dates transactions occurred.
    - **Invoice No.** – The numbers of invoices that earned points.
    - **Points** – Number of points involved in each transaction. Redemptions and transfers to other people are listed as negative numbers.
    - **Status** – Pending displays until transaction is completed. Completed appears for any transfers you made,

or when other transactions have been finished.

- **Remarks** – Redeemed point transactions display any information entered in the **Remarks** field when making the request (see Redeeming reward points). Transferred point transactions display whether points were given to or received from a particular party’s name (see Transferring reward points).

5. To redeem points, see Redeeming reward points.

6. To transfer points, see Transferring reward points.

Reference

- Date Navigator

Step-by-step instructions

- Redeeming reward points
- Transferring reward points

Redeeming reward points

Redeem any amount of points up to your currently available points for rewards.

1. If not already in the Reward Points window, click **Reward Points.**
2. To redeem your outstanding points, click **Request Redeem.**
3. The **Current Points Statement** pane appears at the top of the Reward Points > Request Redeem window for your reference. You can request points redemption up to the total displayed under **Current Points.**
4. In the **Request Redeem** pane,
   - ***Redeem Method**
     Required. Choose a redemption type in the drop-down, such as Cash or Gift Certificate.
   - ***Points to Redeem**
     Required. Enter the number of points you want to redeem.
   - **Deliver To**

     Select the address in the drop-down you want your reward sent to.
     - **Use the firm address** – Default. Your company address as listed in your profile.
     - **Use the home address** – Your personal address in our records.
     - **Manually type the delivery address in Remarks** – Select this option to send your reward to a different address.
   - **Remarks**

     Enter any special instructions in regards to this request in this field, plus the delivery address if you selected in the **Deliver To** drop-down:
     - **Use the home address,** and you are not sure we have your correct address.
     - **Manually type the delivery address in Remarks.**
5. Click **Save.** Your request is sent to our office, the Reward Points > Request Redeem window closes, points requested are deducted from your **Current Points** total, and your request is listed in the activity grid below the **Current Points Statement** in the Reward Points window.

Step-by-step instructions

- Viewing reward points

Transferring reward points

Transfer points to other people in your firm.

1. If not already in the Reward Points window, click **Reward Points.**
2. To redeem your outstanding points, click **Transfer Points.**
3. The **Current Points Statement** pane appears at the top of the Reward Points > Transfer Points window for your reference. You can request point transfers up to the total displayed under **Current Points.**
4. In the **Transfer Points** pane:
   - ***Transfer To**
     Required. Choose the person you want to gift points to in the drop-down.
   - ***Points to Transfer**
     Required. Enter the number of points you want to give to the person.
5. Click **Save.** The Reward Points > Transfer Points window closes, points transferred are deducted from your **Current Points** total, and the transfer is listed as completed in the activity grid below the **Current Points Statement** in the Reward Points window.

Step-by-step instructions

- Viewing reward points

My Profile

Update your contact information at any time.

Step-by-step instructions

- Updating your profile

Dashboard

The Dashboard is your home page that appears every time you sign into MR Connect. It displays general information for you under Announcements, plus:

- Your top 10 recent orders with us
- Your top 10 recent orders we have obtained records for
- Outstanding payables

Personalize the look of your dashboard by rearranging the layout. Click hyperlinks in your dashboard to get more info, download files, and pay invoices.

Reference

- Account Activity

Step-by-step instructions

- Using your dashboard
- Arranging your dashboard

Change Login Name

Your access to MR Connect might be by your email address or a login name we assigned to you. If we assigned you a login name, you can change this login name at any time.

Step-by-step instructions

- Updating your login name

Change Password

When you are first given access to MR Connect, you are issued a password. You can change this password at any time.

Reference

- Strong password

Step-by-step instructions

- Updating your password

Preferences

Set preferences to customize your experience in MR Connect.

Step-by-step instructions

- Setting personal preferences

User Guide

This interactive manual covers all of the functions in MR Connect.

- To access the user guide from its table of contents, click **[your name] > User Guide.**
- To jump to the section of the manual that is relevant to the function you are currently using, click **Help** in the header of the function window.

Log Out

You are automatically logged out after 20 minutes of inactivity for security reasons. You can also manually log out.

IMPORTANT: Save your work

If you do not finish something, such as a request for services, before logging out, be sure to save your work first. MR Connect does not automatically save your work for you.

Step-by-step instructions

- Logging out

Logging in

You can use MR Connect anywhere you have internet access through a browser. All you need is the URL, your user name (most likely your work email address) and password or a social media account.

On the log-in page, either:

- **Enter your credentials**

  1. **Login Email/Login Name**
     Enter your work email address or the login name assigned to you.

  2. **Password**
     Enter the password assigned to you. If you don't have a password or forgot your password, you can set it yourself. See Setting your password at log-in.

  3. Click **Login.**

  TIP: Avoid account lock-outs

  If you attempt to log into MR Connect with an incorrect password too many times, it will lock you out of the system. The only way to unlock your account is to contact an administrator. Instead of going through this hassle, use **Forgot Password** to set a new password and avoid being locked out of your MR Connect account. See Setting your password at log-in.

  TIP: Change your password anytime

  You do not need to keep the same password. To change your password, see Updating your password.

- **Sign in with social media**

  If you have the option, you can sign in using your social media account by clicking one of the social media buttons (Facebook, Google+, LinkedIn, or Microsoft).

  TIP: Perks of social media sign-in

  If you sign in through social media, you don't have to keep track of another online account (for MR Connect). Plus you don't need to know your password. However your social media account must be registered to the same work email address you provided to us.

NOTE: Verify your device

If you are signing in on a device for the first time or on a non-"trusted" device, e.g., a public computer, you might be asked to verify the device first. See Verifying your device.

Step-by-step instructions

- Setting your password at log-in
- Updating your password
- Verifying your device

Setting your password at log-in

If you don’t have a password or forgot your password, you can set a new one from MR Connect’s Log-in page.

1. On the log-in page, click **Forgot Password.**
2. On the Forgot Password web page, enter your **Login Email** or **Login Name.**
3. In the ***Type the code from the image** field, enter the characters that appear above the field. If you are having difficulty recognizing the characters:
   - Click  to hear the characters pronounced.
   - Click  to see a different set of characters.
4. Click **Submit.** In the popup that appears, click **OK.**
5. If your log-in email/name is in the system, you will receive an automated email. Click the link in the email to go to the Reset Password page. You have 24 hours from the time you submitted your request to click the link.
6. On the Reset Password page, enter a strong password in ***New Password** and ***Confirm New Password** *(both required),* then click **Submit.**

NOTE: Changing your password

In addition to the **Forgot Password** option, you can change your password within MR Connect at any time.

Reference

- Strong password

Step-by-step instructions

- Updating your password

Strong password

For a password to be strong, it should:

- Be at least eight characters long.
- Contain characters from each of: upper-case letters, lower-case letters, numerals, and symbols.
- Not contain your name, login name, or birthday.
- Not contain 3 or more characters in sequence (e.g., 123 or abc).

Step-by-step instructions

- Updating your password
- Setting your password at log-in

Verifying your device

If you are signing in on a device for the first time or on a non-“trusted” device, e.g., a public computer, you might be asked to verify the device before you can access the site using two-factor authentication (2FA).

Continued from Logging in.

1. If the Request Verification Code screen appears, click the radio button for where you want your verification code sent (e.g., email address or mobile phone), then click **Request.**

2. Check your messages for the code, then enter the code in the Verification Code screen’s boxes. You have 5 minutes from when you requested a code to enter the code. If you miss the deadline, repeat these steps again. If you did not receive a message with a code, click **Didn’t Get a Code** and follow the instructions.

3. Depending on the device:

   - **If this is a device that you want to sign in on without entering a verification code each time** – leave **Remember this browser as trusted browser** checked and press **Enter** or **click OK.**

   - **If you are logging in on a public device or a device you want to verify each time** – uncheck the box. Click **OK.**

NOTE: Do you trust this device?

If you use MR Connect on public machine, for example a shared device or a computer in a public library, remember to uncheck the **Remember this browser as trusted browser** checkbox. If you leave it checked, the browser will be registered as a trusted browser and MR Connect will not ask for 2 factor authentication again within 2 years unless you delete the browser's cookie manually.

Reference

- Two-factor authentication (2FA)

Two-factor authentication

Two-factor authentication (2FA) is a way to more securely confirm a user’s identity by adding a second factor to signing in with a user name and password. In MR Connect, 2FA uses a verification code that is sent to the user’s email address or mobile device, which the user then enters during sign-in to confirm their identity.

Step-by-step instructions

- Verifying your device

Modules & functions

All functions are organized into menus at the top of the web page, grouped by module. Functions are accessible by clicking next to module names.

- **Attention**

  View tracking information about your orders. Contact us about outstanding orders.

- **Orders**

  Download and review records you ordered. View the status of your orders and related parts.

- **Account Activity**

  View invoices and pay history. Pay invoices.

- **Repository**

  Download files.

- **Online Orders**

  Order records, update orders, and upload files.

- **Support Tickets**

  Get help and maintain a paper trail of the process.

Reference

- Function layout

Function layout

Functions are laid out in [windows](#), which are divided into [panes](#), with supplemental options in fly-out [panels](#).

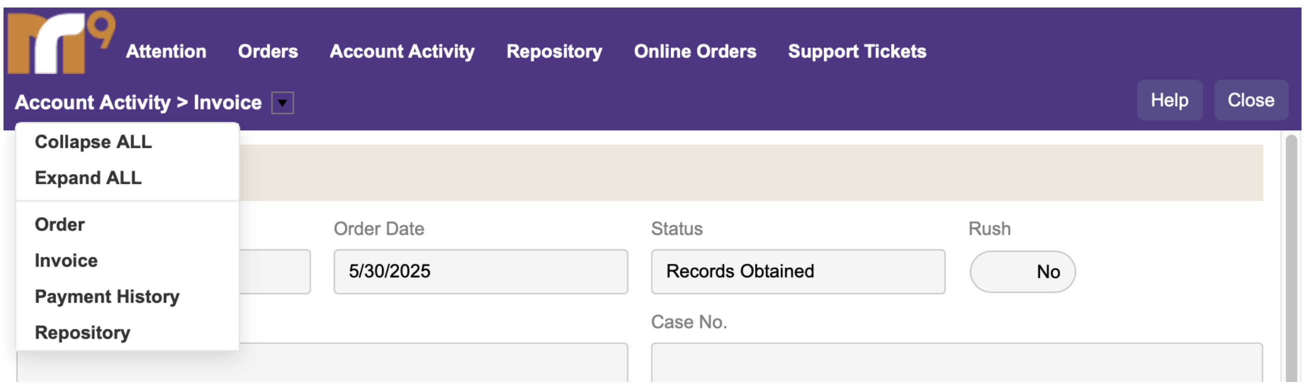
- ### Windows

  When you select a function, it opens in the main browser window with its label at the top under the main menu.

- ### Panes

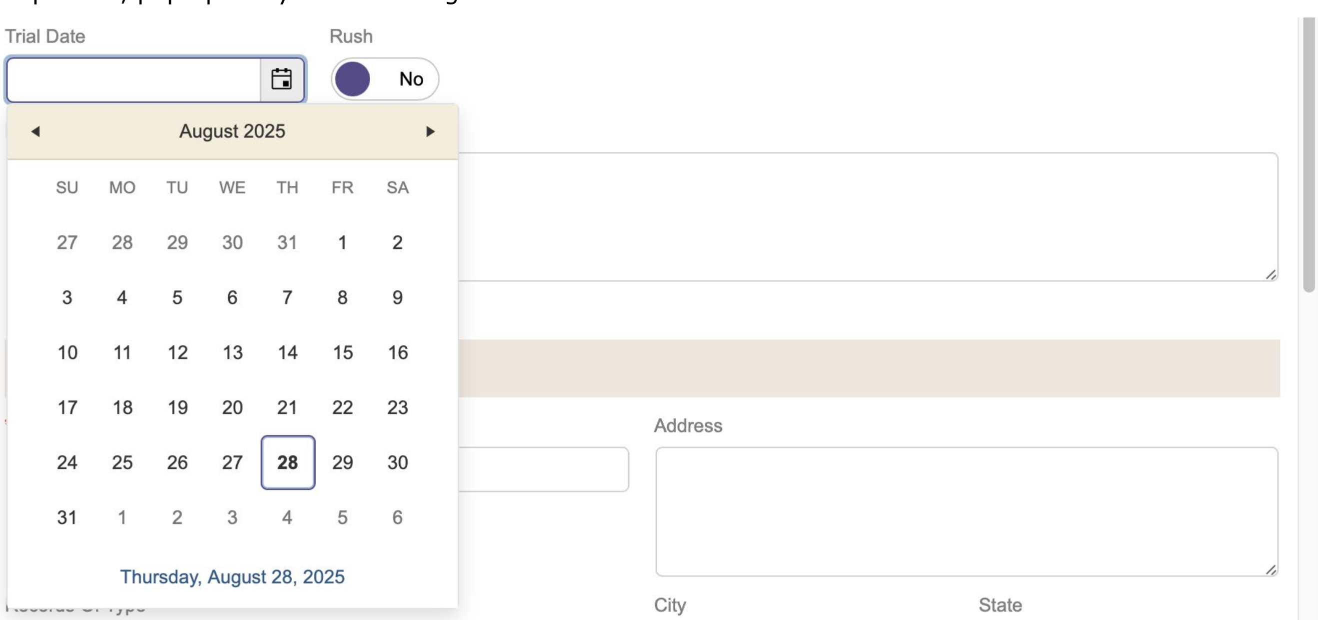
  Different aspects of each function appear in their own panes in the function's browser window.

  - If a pane has next to its label, click it to hide the pane.
  - To view a hidden pane, click next to the pane's label.
  - In some functions there is a next to the window's label. Click it and select:
    - Collapse ALL to hide all panes.
    - Expand ALL to view all panes.
    - An individual pane name to jump to that pane.



- ### Panels

  Function options that are accessed by buttons to the right of a field or pane label have their own panels that drop down, pop up or fly out to the right.



NOTE: Required fields

Fields and options that include * in their labels require an entry/selection before you can save your work.

TIP: Tab between fields & other shortcuts

Fields in panes and panels are designed so that you can move between them and make some selections without a mouse:

- Use the **Tab** key to move forward from field to field. (Lookup fields are skipped when tabbing.)
- To move backward, use **Shift + Tab.**
- To make a selection in a drop-down, enter the first letter of the selection. If more than one selection begins with the first letter (for example, states that begin with C), pressing the letter key again will advance through the choices that begin with the same letter.

Reference

- Modules & functions
- Lookup panel

Step-by-step instructions

- Searching in MR Connect
- Sorting rows
- Resizing columns
- Entering dates
- Accessing results
- Exporting & printing results

Searching in MR Connect

You search your online database through the **Search By** pane in general function windows or a **Search By** field in a Lookup panel.

Both work similarly:

1. **Set search parameters**

   Use the filters or checklist to enter your search parameters.

   - **Search By panes** have multiple filters to narrow a search.
   - **Lookup panels** have only one filter — the **Search By** field — or they have a checklist of options.

2. **Get results**

   1. Click . Any information in the database that meets your search criteria is displayed in a **Results pane**.
   2. Click the hyperlinked text of your desired result to select it.

		Order No.	Order Date	Records Of
		5341	4/10/2025	Ryan Smith

Reference

- Search By pane
- Lookup panel
- Results pane

Search By pane

Most main functions include a **Search By** pane that contains multiple filters to restrict a search.

In most cases, you must set at least one filter in a **Search By** pane before clicking . Any filters marked with a red asterisk (*) must have an entry.

Search filters:

- **Text-entry fields**

  Blank fields with white backgrounds are data-entry fields that you can enter text into directly to search. You can enter full or partial words to search (minimum of 3 characters).

  To view all entries for a single search field, enter 3 percentage signs (%%%) in the field.

- **Drop-down lists**

  Drop-downs display a default option. Click the field's ▾ to select a different option in the drop-down.

- **Date Navigator**

  Click a date field's to set a date using the perpetual calendar. See Entering dates.

- **Grayed-out fields**

  You cannot type any text in these fields. Instead, click its icon (or) to change the information displayed or to delete it. See "Drop-down lists" above or Lookup panels.

- **Multiple search criteria**

  You can apply search filters either one at a time or in combination with each other.

- **Clear search criteria**

  To clear all search criteria at once, click **Search By > Clear All.**

Reference

- Date Navigator
- Lookup panel
- Results pane

Lookup panel

Some sub-functions or panes within windows have their own search capability called Lookup. When you click next to a field, a Lookup panel appears. Depending on the field, the Lookup panel's search function is:

- **Lookup search filter**

  Two-step search function:

  1. **Search By**
     Select a search option in the drop-down.
  2. **Search Criteria**
     Depending on the function, you either:
     - **Enter text in the field** to search for in the database. You must enter at least 3 consecutive characters in a search field. To find all listings, type %%%.
     - **Click in the field,** then select from the drop-down list. Repeat to select more than one filter to search with. Click **X** to delete a filter.

- **Lookup list**

  List of search options related to the field. Default is usually ALL. You can select single or multiple items:

  - **Click the Lookup panel's title box** to select all items/clear all checkmarks at once.
  - **Click individual list items' boxes** to select/clear them.

- **View results**

  Click **OK** in lists or in search filters to see entries that match your search criteria.

Reference

- Search By pane
- Results pane

Results pane

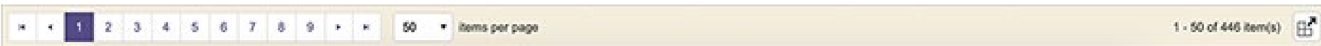
When you search for information in MR Connect, it is presented in the results pane as a grid, divided into horizontal rows and vertical columns. The first row is always the heading row. It contains labels that explain the contents of the columns.

- **Locking column**

  In some results panes, the leftmost column that contains hyperlinked entries remains visible when scrolling to the right in the results grid.

- **Record Navigator**

  When the results of a search are too numerous to fit in one page, use the Records Navigator at the lower left of the results page to locate the record you want.

  - **Arrow keys**

    Use and to page back and forth through the results.

  - **Skip arrow keys**

    Use and to go to the first or last page.

  - **Items per page**

    Select a number in the drop-down to limit the number of entries displayed per page.

    The lower right side of the pane lists the number of entries in the returned results.

- To view results differently, see Sorting rows and Resizing columns.

Reference

- Search By pane
- Lookup panel

Step-by-step instructions

- Sorting rows
- Resizing columns
- Accessing results
- Exporting & printing results

Sorting rows

The initial results view returned is listed in alphabetical or numeric order of the hyperlinked information in each result. You can sort the information in the data grid by a single column or set of columns in either ascending or descending order.

- **Ascending/descending sort order**

  The default sorting column is indicated by  in the header. Click the column header to switch to descending sort order. Indicator changes to  and rows re-sort.

- **Sort by a different column**

  To change which column results are sorted by, click the heading of the column you want to sort the rows by. Click the column header again to toggle the sort order between ascending and descending.

- **Sort by multiple columns**

  To sort rows by multiple columns, click the column you want as the first sort variable, then Ctrl-click (Windows OS) or command-click (Mac OS) to select the second sort variable. MR9 numbers the sort indicators for your reference, for example: 

. Repeat to select as many columns to sort by as you wish. To toggle the sorting order of a column within the selected set, click the column header while holding down the Ctrl/command key. To disable multiple column sorting, click any column header.

Reference

- Results pane

Resizing columns

You can adjust the width of any column in a data grid. To change a column’s width, move the cursor to the divider at the right edge of the column header. The cursor changes to a horizontal double arrow, which you can drag (in either direction) to resize the column.

Reference

- Results pane

Accessing results

To access an individual result in a results pane, click the hyperlinked text in its results row:

Reference

- Results pane

Exporting & printing results

While you can use your browser's print function to print screens from MR Connect, if you want to:

- Save information from a search.
- Create a report from search results.
- Print the information in a single pane or panel.

Use the export function to export the data to *Excel* or as a CSV (Comma-Separated Values) file to open in other applications instead.

- **To export results**

  Any pane or panel that has  or  in lower right corner can be exported as an *Excel* file by clicking the icon and selecting **Export to Excel.** Some grids will also have the option, **Export to CSV,** which will export the grid as a CSV (Comma-Separated Values) file.

- **To print results**

  If you want to print out results, click  or  and export as an *Excel* file. You can clean up the results in *Excel,* then print from there.

- **To save results**

  Each time you click  or  and choose an export format, a file is automatically created with a generic name based on the function you exported from and saves it in your Downloads folder. To ensure that you can find the results later, rename the file to something more meaningful and move the file to a folder you designate for the purpose of storing these types of files.

Reference

- Results pane

Date Navigator

Every date field in MR Connect has a perpetual calendar, called **Date Navigator,** accessed by clicking its . It provides a quick and easy way to add or change dates.

Reference

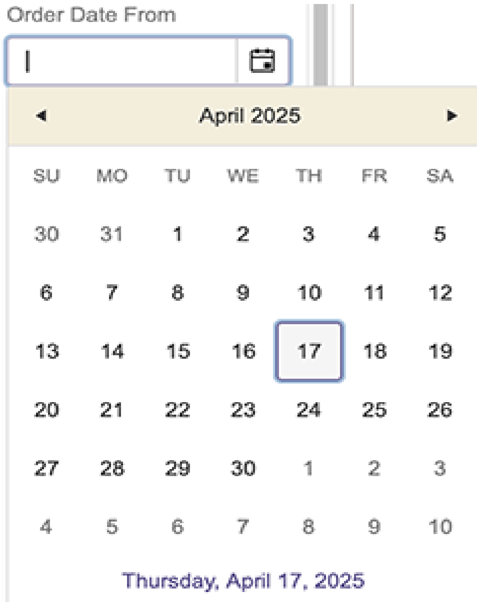
- Search By pane

Step-by-step instructions

- Entering dates

Entering dates

Instead of typing in dates, use the Date Navigator attached to every date field to view and select dates.



- **Select another date**

  Click the date you want.

- **Move to the previous month**

  Click ◀.

- **Move to the next month**

  Click ▶.

- **Choose a different month**

  Click the month name, then select from the twelve months that appear.

- **Choose another year**

  Click the month name. Then click ◀ or ▶ next to the year.

TIP: Change dates using your keyboard

You can also change dates by using the keyboard to type the date in the field instead of using the Date Navigator. Use MM/DD/YYYY format.

Autofilling credit card information

Instead of entering credit card information from scratch each time you want to pay online, store your credit card details in Link, a digital wallet that makes online payments easy and secure. It works on any device or browser, and after setting up your Link account — which you can do from inside MR9 — it will autofill the payment fields with your saved credit card information.

Continued from Paying invoices online online.

1. In the **Credit Card Information** pane of a Pay Invoice(s) window, click the **Autofill link** button in the ***Card Number** field.
2. In the popup that appears enter your email address in the **Email** field.
3. If this is your first time using Link, enter your cell phone number in the **Mobile phone number** field.
4. Click **Add payment method.**
5. Enter your credit card information
   - **Card Number**

     Required. Enter the number issued to your credit card.
   - **Expiration Date (month/year)**

     Required. Select the 2-digit month and the 4-digit year your card will expire in the drop-downs.
   - **CVC**

     Required. Enter your credit card’s 3- or 4-digit Card Verification Calue code.
   - **Country or region**

     Required. Default is United States. Select another place in the dropdown if necessary.
6. Click **Continue.**
7. The next time you pay online when you click the **Link** button in the **Card Number** field, Link will send you a verification code. Enter the verification code in the popup, then click **Continue.** Link will fill in the payment fields with your saved information.

Reference

- Link

Step-by-step instructions

- Paying invoices online online

Requesting records & other services

You can submit a request with only the case, patient/subpoenaed witness, and responsible party's names, plus a location to obtain records from or serve subpoenas on. You can include additional information — such as trial details, patient/witness information, other attorneys of record, and 3rd party billing information. You can also upload related files.

1. **Start a new request**

   1. To make a new request, click **Online Orders** in the main menu.
   2. Click **New.** The New Order window opens.

   TIP: Save time by copying an existing order

   Instead of starting orders from scratch each time, copy information from an existing order into a new one, then update it. See Copying requests.

2. **Enter required info**

   1. In the New Order's **Case** pane, enter the text of the case name in the ***Style of Case** fields in the way you want it to appear on cover pages and other legal papers *(required).*
   2. Scroll or jump to the **Records Of** pane. Enter the patient's name — or witness if this is a subpoena — in ***Records Of** *(required)*
   3. Scroll or jump to the **Scheduling** pane.
   4. **Scheduling Firm** is not editable. ***Scheduling Contact** *(required) d*efault is your name. If you are not the person requesting the services, select the correct contact in the dropdown.
   5. Click **Save.** New panes for **Files, Attorneys of Record,** and **Locations** appear and the window scrolls to the **Files** pane.
   6. Before you can submit this order, you must add at least one location to the order. To designate the location, see Entering locations.

3. **Enter additional info (optional)**

   You can enter other order information, if desired. Scroll or jump to each pane:

   - **Case**

     To enter case information, such as the jurisdiction, court, and if this is a rush order, see Entering case information.

   - **Records Of**

     To enter information about the patient — or witness if this is a subpoena — such as personal ID numbers, address, and relevant dates, see Entering patient information.

   - **Scheduling**

     To change the contact responsible for requesting this service and enter who the law firm is working for, see Updating scheduling contacts.

   - **Billing**

     Depending on who is financially responsible for this request, set **Same as Scheduling** to:

     - **Yes** — If you are responsible for the order's invoice.
     - **No** — Default. If you are not responsible for the invoice, see Entering third-party billing information.

- **Files**

  To send files along with the request, see Uploading files. You can also send files for this order later.

- **Attorneys Of Record**

  You are automatically listed as the ordering attorney in your online requests. To enter or change attorney of record information, see Adding attorneys of record.

- **Locations**

  To designate, update, or delete a location where records are or where the subpoena is to be served, see Entering locations.

4. **Save request**

   To save your work but not submit your request, click **Save >**

- **Save & Edit** – To continue working on the same request.

- **Save & Close** – To save your work and close the window.

5. **Send request**

   When your order is complete, review your request, then click **Submit Order.** Our office will receive an alert notifying us of your request.

   When we import your request into our system, you can track its progress in Orders. See Viewing order status & downloading retrieved files.

   NOTE: Save vs Submit Order

   You can save your work at any time. We won't receive your request until you actually submit it. If you are not ready to send your request to us — for example you are waiting for more information — you can keep your request editable by saving it instead.

   Once you have submitted an order, you can't update information in any pane except **Files, Attorneys of Record,** and **Locations.** See Updating service requests. If you need to make other changes to the request after submitting it, please contact us.

Reference

- Orders

Step-by-step instructions

- Copying requests
- Entering locations
- Entering case information
- Entering patient information
- Updating scheduling contacts
- Entering third-party billing information
- Uploading files
- Adding attorneys of record
- Updating service requests
- Viewing order status & downloading retrieved files

Viewing & updating your orders

Find your orders using various search criteria to view their details, upload files, update requests, and request new orders.

1. **Set search criteria**

    1. Click **Online Orders** in the main menu. Any incompleted orders made by people at your firm appear so you can easily access these orders to finish and submit.

    2. To narrow the results or find other orders, use the filters in the **Search By** pane:

        - **Contact**

          Default is ALL. To limit results to your orders, click then click your hyperlinked name in the **Lookup Contact** panel to select it.

        - **Case Name**

          Enter part of a case's name.

        - **Records Of**

          Enter part of a patient's name — or if this is a subpoena, part of the witness name.

        - **Order No.**

          Enter the entire order number.

        - **Client Matter No.**

          Enter the entire client matter number.

        - **Order Status**

            - **ALL** – To search all of your firm's outstanding orders.

            - **Incompleted** – Default. To see your unfinished requests.

2. **View results**

    1. Click . All orders that fit the search criteria appear in the results pane.

    2. Click a hyperlinked **Order No.** to:

        - View details.

        - Upload files.

        - Update information.

        - Copy the order to create a new one.

    3. To request new services, see Requesting records & other services.

Step-by-step instructions

- Viewing order details
- Uploading files
- Updating service requests
- Copying requests
- Requesting records & other services

Viewing order details

Review orders you haven't submitted yet. You can update some information in existing orders. Information in grayed out fields cannot be updated. Upload related files. Manage attorneys of record. Add and remove locations for records retrieval/subpoena serving.

1. Continued from Viewing & updating your orders.
2. At the top of the Edit Order window, view basic information:
   - **Order No.**

     Our reference number for the order.
   - **Order Date**

     Date order was submitted.
3. View/update information about the related case in the **Case** pane. See Entering case information.
4. Scroll or jump to **Records Of** pane to view/update information about the patient. See Entering patient information.
5. Scroll or jump to **Scheduling** pane to view/update basic information about who submitted the order request. See Updating scheduling contacts.
6. Scroll or jump to **Billing** pane to review basic billing information.
7. Scroll or jump to **Files** pane to add files. See Uploading files.
8. Scroll or jump to **Attorneys of Record** pane to view/update who are parties to the related case. See Adding attorneys of record.
9. Scroll or jump to **Locations** pane to view/update where records should be retrieved from/subpoenas served at. See Entering locations.

Step-by-step instructions

- Viewing & updating your orders
- Entering case information
- Entering patient information
- Updating scheduling contacts
- Uploading files
- Adding attorneys of record
- Entering locations

Entering case information

You must enter the case name before saving a request. You can enter other information about the case now or anytime before you submit the request, or leave them blank.

1. Continued from Requesting records & other services.
2. In the **Case** pane, enter information/make selections:
   - ***Style of Case**

     Required. Enter the case name in the Style of Case fields as you want it to appear on legal papers.
   - **Full Case Name**

     If the case name is longer than 50 characters by 7 lines, enter it in these fields.
   - **Case No.**

     If applicable, enter the case number.
   - **Federal Case**

     Default is No. Slide to Yes if this case will be heard in a federal district court.
   - **State**

     Click ▾ and select the state (where the case is filed) in the dropdown.
   - **County**

     If this is a state case, enter the county, such as "Harris."
   - **Court**

     If this is a state case, enter the judicial court information, such as "151st" or "County Court at Law Number Two."
   - **District**

     Federal or state level district, such as "Southern."
   - **Division**

     If this is a federal case, enter the division, such as "Houston."
   - **Trial Date**

     Scheduled date for trial to begin. To enter a date, see Date Navigator.
   - **Rush**

     Default is No. Slide to Yes if this is a rush order.
   - **Remarks**

     Enter any additional case information not included elsewhere on the form.
3. When finished, click **Save.**

Reference

- Date Navigator

Step-by-step instructions

- Requesting records & other services

Entering patient information

The only required patient/witness information is their name, but you can enter other information about the person whose records you are to retrieve or serve a subpoena on.

1. Continued from Requesting records & other services.

2. In the **Records Of** pane, enter text or make selections:

   - ***Records Of**

     Required. Patient name — or witness if this is a subpoena — including “aka” (also known as), if applicable.

   - **Records Of Type**

     Category of patient/witness, such as Plaintiff.

   - **SSN**

     Person’s Social Security number

   - **Driver License No.**

     Person’s driver’s license number

   - **Address**

     Person’s street address only. Do not include city, state or zip code here.

   - **City**

     Person’s city. Enter the postal code in **Zip** first to have the city name automatically entered here.

   - **State**

     Person’s state. Enter the postal code in **Zip** first to have the state name automatically entered here.

   - **Zip**

     Enter the person’s postal code in **Zip** and click . **City, State,** and **Country** fields will automatically populate.

   - **Country**

     Person’s country. Enter the postal code in **Zip** first to have the country name automatically entered here.

   - **Date of Birth**

     Person’s date of birth. Enter the date in the field or click to select a date in the Date Navigator.

   - **Date of Death**

     If person is deceased, the date of their death. Enter the date in the field or click to select a date in the Date Navigator.

   - **Authorized By**

     Specify whether the authorization is by subpoena, patient, or other. The default is Subpoena.

   - **Date of Incidence**

     Date the relevant event happened, if applicable. Enter the date in the field or click to select a date in the Date Navigator.

Reference

- Date Navigator

Step-by-step instructions

- Requesting records & other services

Entering locations

You must include the name of at least one location in your requests for records or other services. You can include as much detail about a location as you wish.

1. Continue from Requesting records & other services.
2. In the Edit Order window, scroll or jump to the **Locations** pane.
3. In the **Locations** header, click .
4. In the **New Location** panel, enter information:
   - ***Location Name**

     Enter the location's name. Or if you have the option, you can click and search for the location in the **Lookup Location** panel instead of entering the location manually. (See Lookup panel.)
   - **Department**

     If applicable, enter the department where the records are located.
   - **Address**

     If blank, enter the street address.
   - **City**

     If blank, enter the postal code first to have the city name automatically entered here.
   - **State**

     If blank, enter the postal code first to have the state name automatically entered here.
   - **Zip**

     If blank, enter the postal code in this field and click . You do not need to enter the **City, State** or **Country.** They will automatically populate based on the zip code.
   - **Country**

     If blank, enter the postal code in **Zip** first to have the country name automatically entered here.
   - **Phone**

     If blank, enter the location's phone number.
   - **Fax**

     If blank, enter the location's fax number.
   - **Record Type**

     If applicable, select the category of records you want retreieved in the dropdown.
   - **Rush**

     Default is No. Slide to Yes if this is a rush order.
   - **Instructions**

     Select the admissible status of the records being sought in the dropdown.
   - **Remarks**

     Enter any additional relevant information about the location.

5. Click **Save >**

- **Save & New** – To add another location to the same request.

- **Save & Close** – If you don’t have any more locations to add to the request.

Reference

- Lookup panel

Step-by-step instructions

- Requesting records & other services

Updating scheduling contacts

Designate who is being represented in an order's related case. Change the default firm and contact in new requests.

1. Continued from Requesting records & other services.
2. Scroll or jump to **Scheduling** pane to view/update basic information about who submitted the order request:
   - **Scheduling Firm**

     Name of the firm that is requesting services, usually your firm. If you have the option, you can select a different firm in the dropdown.
   - **Scheduling Contact**
   - Name of the ordering contact. Default is your name. If you have the option, you can select a different person at the scheduling firm in the dropdown.
   - **Represent For**

     Select the category of client the scheduling firm is working for.
   - **Represents**

     Enter the client's name.
   - **Ordered By**

     In Edit Order windows only

     Name of firm who requested services. *Uneditable.*

Step-by-step instructions

- Requesting records & other services

Entering third-party billing information

If someone other than the firm requesting services is responsible for paying invoices for an order, you can include that information when submitting your request.

1. Continued from Requesting records & other services or Adding attorneys of record.
2. Scroll or jump to **Billing/Bill To** pane.
3. With **Same as Scheduling** set to No, enter the third party's billing information:
    - **Company/Firm Name**

      Name of firm that will pay the invoice for the services.
    - **Address**

      Firm's street address only. Do not include city, state or zip code here.
    - **City**

      Firm's city. Enter the postal code in **Zip** first to have the city name automatically entered here.
    - **State**

      Firm's state. Enter the postal code in **Zip** first to have the state name automatically entered here.
    - **Zip**

      Enter the firm's postal code, then click . **City, State,** and **Country** fields will automatically populate.
    - **Country**

      Firm's country. Enter the postal code in **Zip** first to have the country name automatically entered here.
    - **First Name/Mi./Last Name**

      Name of person at **Company** responsible for handling the order's invoice.
    - **Salutation**

      Select a title in the dropdown for the person at **Company** responsible for handling the order's invoice.
    - **State Bar No.**

      If the contact person is an attorney, enter their state bar number.
    - **Phone**

      Enter a phone number for the contact/firm.
    - **Fax**

      Enter the firm's fax number.

Step-by-step instructions

- Requesting records & other services
- Adding attorneys of record

Uploading files

Send files along with requests for services or at anytime.

You can upload files of any type and size. However, we generally do not recommend uploading files over 100MB in size. Instead, break up large files into several smaller files before uploading.

Save time by uploading multiple files at a time. Only the ordering attorney for an order can upload files to an order.

1. **Select file(s) to upload**

    1. Continue from Requesting records & other services or search for the order you want to upload files to (see Viewing & updating your orders).
    2. Click the order's hyperlinked **Order No.**
    3. Scroll or jump to the **Files** pane.
    4. Click in the **Files** pane header.
    5. In the **Select Files** panel, you can upload files in 2 ways:
        - **Drag and drop** your file(s) into the dotted-border field.
        - **Click the dotted-border field,** then locate and select your file(s) from your computer.
    6. The file(s) you selected will appear above the dotted-border field. If you selected the wrong file to upload, click .
    7. Continue adding files if desired.
    8. When finished adding files to upload, click **Next.**

2. **Set file options**

    In the **New Files** panel, enter values for the uploaded file(s):

    - **File Type**
      Required. Select the category the file belongs to, such as Billing Records or Exhibit, in the drop-down.
    - **Description**
      Any text entered here is searchable.

    TIP: Save time when uploading multiple files

    If you are uploading multiple files and all or some of them are the same file type, instead of entering values individually, click **Set File Type.** Then in the **Set Value** panel check the boxes of files that are the same file type (or check the header box to select all). Select their common file type in the **File Type** drop-down and click **OK.**

3. **Upload file(s)**

    In the **New Files** panel, click **Upload.**

Adding attorneys of record

You are automatically included as an attorney of record in the order. You can add other attorneys, update attorneys roles, or delete attorneys from the order.

1. Continue from Requesting records & other services.
2. In the Edit Order window, scroll or jump to the **Attorneys of Record** pane.
3. You are automatically listed as the ordering attorney in your online requests. To:
   - **Add other attorneys of record,** click .
   - **Change a listed attorney's information,** click the hyperlinked name.
4. In the **New Attorney of Record/Edit Attorney of Record** panel, any grayed out fields are uneditable. Enter text and make selections:
   - ***Firm Name**

     Name of the attorney's firm.
   - **Address**

     Street address of the attorney's firm.
   - **City**

     Enter the postal code in **Zip** first to have the city name automatically entered here.
   - **State**

     Enter the postal code in **Zip** first to have the state name automatically entered here.
   - **Zip**

     Enter postal code in this field and click . **City, State,** and **Country** fields will automatically populate.
   - **Country**

     Enter the postal code in **Zip** first to have the country name automatically entered here.
   - **Phone**

     Attorney's phone number.
   - **Fax**

     Fax number of the attorney's firm.
   - ***First Name**

     Attorney's given name.
   - **Mi.**

     The attorney's middle name.
   - ***Last Name**

     Attorney's family name.
   - **Salutation**

     Select a title in the dropdown for the attorney.
   - **State Bar No.**

- **State Bar No.**
  The number of the attorney's state license to practice law.
- **Ordering Attorney**
  Default is No. Slide to Yes if attorney will be signing the Notice.
- **Opposing Side Attorney**
  Default is No. Slide to Yes if this attorney represents the side opposite from the scheduling attorney.
- **Patient's Attorney**
  Default is No. Slide to Yes if this attorney represents the patient of record.
- **Represent For**
  Which side this party represents (e.g., Plaintiff or Defendant).
- **Represents**
  Name of the person or group this party represents.

5. Depending on who is financially responsible for this request, set **Same as Scheduling** to:
   - **Yes** — If this attorney is responsible for their order's invoice.
   - **No** — Default. If this attorney is not responsible for their order's invoice, see Entering third-party billing information.
6. Click **Save >**
   - **Save & New** – To add another location to the same request.
   - **Save & Close** – If you don't have any more locations to add to the request.

Reference

- Lookup panel

Step-by-step instructions

- Requesting records & other services
- Entering third-party billing information

Copying requests

Instead of starting orders from scratch each time, save time by copying information from an existing order into a new one, then update it.

1. In the Online Orders window find an order you want to copy. See Viewing & updating your orders for information on searching for orders.
2. In the order's detail screen, click **Copy & New.**
3. In the **Options** popup, check boxes to include:
   - **Order** – Selected by default. Case information
   - **Files** – Any files uploaded to the original order will be duplicated here.
   - **Attorneys of Record** – Any additonal attorneys who are party to the related case will be copied to this request.
   - **Locations** – Any locations listed in the iriginal order will be copied.
4. The current order closes and all of the selected order information appears in a new order window.
5. Scroll or jump to the **Records Of** pane. Enter the patient's name — or witness if this is a subpoena — in ***Records Of** *(required).*
6. Edit/enter information in the rest of the order if needed. See Requesting records & other services.
7. Click **Submit Order.**

Step-by-step instructions

- Viewing & updating your orders
- Requesting records & other services

Updating service requests

If you have not submitted your request, you can update it. See Requesting records & other services. Once you have submitted a request to us, you cannot change it online, except adding or deleting files, attorneys of record, and locations. If you have other changes, you must contact us.

1. To search for order you want to change, see Viewing & updating your orders.
2. In the Online Orders results, click the order's hyperlinked **Order No.**
3. In the Edit Order window, scroll or jump to **Files, Attorneys of Record,** or **Locations.**
4. To update this request:
   - **Files**

     To send files along with the request, see Uploading files.
   - **Attorneys Of Record**

     To update who are parties to the related case. See Adding attorneys of record.
   - **Locations**

     To designate, update, or delete a location where records are or where the subpoena is to be served, see Entering locations.
5. When finished updating the information, click **Submit Order.** Our office will receive an alert notifying us of your request. When we update the order, you will receive an email confirmation.

Step-by-step instructions

- Requesting records & other services
- Viewing & updating your orders
- Uploading files
- Adding attorneys of record
- Entering locations

Updating your contact information

You can update your profile at any time.

1. To update your contact information, click **[your name on the screen]** ▼ **> My Profile.**
2. In the My Profile window, click **Edit.**
3. **Firm Info** fields are uneditable. If any of this information is incorrect, contact our office. In the **My Info** pane, update fields as needed:
   - ***FIrst Name**

     Required. Your given name.
   - **Mi.**

     Your middle name or initial.
   - ***Last Name**

     Required. Your family name.
   - ***Full Name**

     Required. Instead of entering text here, enter your name in the other fields first, then select one of the full name variations from the drop-down next to this field.
   - ***Email**

     Required. Your business email address. If you have the option and want to sign in using social media, you must enter the same email address here as your social media account, i.e., Facebook, Google+ or LinkedIn. (See Logging in.)
   - **Salutation**

     Select your title, i.e., how you want to be addressed, in the drop-down.
   - ***Main Phone**

     Required. Your firm's phone number.
   - **Direct Phone**

     Your phone number at the firm.
   - **Mobile Phone**

     Your cell phone number.
   - **Mobile Vendor**

     Your cell phone service provider.
   - **Fax**

     If you have a facsimile machine, enter your fax number.
4. Click **Save.**

Step-by-step instructions

- Setting your password at log-in

Using your dashboard

When you sign into MR Connect the first window that appears is your dashboard. It includes an announcements section for information we want you to know along with quick access to your orders, files, and financial info.

Personalize the look of your dashboard by rearranging the layout. Click hyperlinks in your dashboard to get more info, download files, and pay invoices.

- **To access your dashboard**

  Within MR Connect, you can access your dashboard by clicking **[your name] > Dashboard.**

- **To personalize your dashboard:**

  See Arranging your dashboard.

- **To view orders:**
  - **Individual order listed** – Click the hyperlinked order or part number and see Viewing order details.
  - **Other orders/all orders** – Click **More >** in the header of the **Top Ten Recent Orders/Received Records** pane to open the Orders window. See Viewing your orders.

- **To download files:**
  - **Files for order listed** – See Downloading & viewing case files.
  - **Files for other orders/all orders** – See Searching case repositories.

- **To view/pay invoices:**

  Click **More >** in the **Total Payables** header to open the Account Activity window where you can look up and pay invoices. See Viewing account activity.

Reference

- Orders
- Account Activity

Step-by-step instructions

- Arranging your dashboard
- Viewing order details
- Viewing your orders
- Downloading & viewing case files
- Searching case repositories
- Viewing account activity

Arranging your dashboard

Personalize the look of your dashboard by rearranging the layout and resizing individual panes.

- **To change the width of a pane**

  Click and drag the right side of the pane. When you release, the pane will snap to the currently visible right border line. Depending on how large or small you make a pane, the rest of the panes in the dashboard will automatically rearrange themselves.

- **To change the height of a pane**

  Move the cursor to the bottom of the pane. When the cursor transforms into a double-headed arrow, click and drag up or down to resize the pane vertically.

- **To rearrange the order of the panes**

  Click and drag a pane header to its desired location. If placement is allowed, an empty box will appear in the location that is the same size as the pane, and other panes will automatically rearrange themselves in response. When you release, the pane will align itself inside the box.

- **To save your customized layout**

  Click **Save Layout.** Then click **OK** in the popup that appears.

Step-by-step instructions

- Using your dashboard

Updating your login name

If you sign into MR Connect with a login name instead of your email address, you can change your login name at any time.

1. To update your login name, click **[your name on the screen]** **> Change Login Name.**
2. In the Change Login Name window, your current login name is displayed. To change your login name, enter a new one in ***New Login Name.**
3. Click **Save.**

Updating your password

You can change your password at any time. We recommend using strong passwords for better security.

1. **Enter your current password**
    1. To update your password, click **[your name on the screen]** **> Change Password.**
    2. In the Change Password window, enter your password or select it from the drop-down in ***Current Password** *(required).*
2. **Create a new password**
    1. Enter your new password in both ***New Password** and ***Confirm New Password** *(required).*
    2. Click **Save.**

NOTE: Best business practices for passwords

It is good business practice to change your assigned password to a strong password that only you know, and also to change it periodically. Once you change your password, no one else will know it nor can it be retrieved from the system.

TIP: Forgotten/no password

If you don't have a password or forgot your password, you can set it from the log-in screen. See Setting your password at log-in.

Reference

- Strong password

Step-by-step instructions

- Setting your password at log-in

Setting preferences

Customize what your windows look like.

1. To set preferences, click **[Your name on the screen]** **> Preferences.**
2. In the **General** pane of the Preferences window:
   - **Default row count for grid**

     Select a default from the drop-down for how many rows to display in result grids. Higher row counts will cause results to take longer loading.
   - **Use Dark Mode**

     Default is No. Click to select Yes to set your MR Connect to reverse/light on dark mode.

Reference

- Results pane

Logging out

While you will be automatically logged out after 20 minutes of inactivity for security reasons, you can also log out manually at any time.

1. To log out, click **[your name on the screen]** **> Log Out.**
2. In the popup that appears, click **Yes.**

IMPORTANT: Save your work

If you do not finish something, such as a request for services, before logging out, be sure to save your work first. MR Connect does not automatically save your work for you.