## Summa Health – Law Firm Instructions for Legal Requests

Please follow the steps below to request matters to be opened in CounselLink.

Note: Submit a new legal request for each matter you need opened in CounselLink

Login to CounselLink <u>www.counsellink.net</u>

umma Health(65631406) 🗸	*	Legal Requests	Matters	Invoices	Fees	Calendar	Profiles	Info Center	Analytics						
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Search Legal Requests.														Q Search	Search Tips
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Created	^														
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- Confirm Summa Health is selected in the client drop-down
- Click on Legal Requests Tab
- Click +Create Legal Request

umma Health(65631406) 🗸 🔺 Legal Requests	Matters Invoices	Fees Ca	Calendar	Profiles	Info Center Analytics					
Legal Request / Create Legal R	Request									
									* Required Fields	
Legal Request Information									^	
Legal Request Title *	Legal Request Title				Requester					
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What	Type of Request is This?		Select				¥			
Documents			Contract R Request N	Related lew Matter Be	Set Up				~	
				Drag ar	nd Drop Files Here to Upload					
Choose a file										

- Legal Request Title: Law Firm Matter Name to be opened in CounselLink
- What Type of Request is This? Choose "Request New Matter Be Set Up"

Legal Request Type				
	What Type of Request is This?	Request New Matter Be Set Up	~	
	Risk Management or Malpractice related?	No	~	
Law Firm Information		Select. No Yes		^
	Name of your Firm *	Name of your Firm		
	Lead or Primary Attorney *	Lead or Primary Attorney		

- Risk Management or Malpractice Related? (Select from dropdown menu)
- Name of your Firm
- Lead or Primary Attorney

Law Firm Information				2
	Name of your Firm *	Name of your Firm		
	Load or Primary Attorney *	Load or Primary Attorney		
	Matter Type	Select.	¥	
	210	Select. ACO Regulatory	8	
Summa Requester Informat	Business owner requesting this matter *	Compliance:Reputatory-Compliance:Reputatory Compliance:Reputatory-HIPAA Compliance:Reputatory-HIPAA Compliance:Reputatory-Projection:Compliance Compliance:Reputatory-Projection:Compliance Compliance:Reputators-Reputators		~
Matter Details	Description/type of Work	Corporate-Anti-Krust Corporate-Deneral Corporate Corporate-Data Corporate-Tax Corporate-Tax		-
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		Drag and Drop Files Here to Upload		
		Choose a file		

## • Matter Type (Select from dropdown menu)

Summa Requester Information				~
	Business owner requesting this matter *	Business switer requesting this matter	0	
Matter Details				~
	Description/type of Work			
	Description/type of Work			
Documenta				~
		Drag and Drop Files Here to Upload		
		Choose a file		

- Business owner requesting this matter? (Who from Summa made the request?)
- Description/type of Work?
- Documents: upload any necessary documents
- Click Submit

Summa will receive and process your request to open the new matter in CounselLink.