



Welcome to the Attorney Portal User Guide. We'll show you how to get set up to quickly, and easily handle your most common transactions with Oasis Financial like managing existing cases, payoffs, submitting new applications, reopening cases, and updating firm information.

Login and Password

Your Oasis Director will assist you with the initial registration and you will receive an email confirmation with a username and temporary password.

Follow the instruction in the email to access the portal. If your temporary password has expired, you can reset it by clicking on **"Forgot Password"** and following the instructions.

In the future you can access your portal by visiting www.myoasis.com

Enter the user-name and password

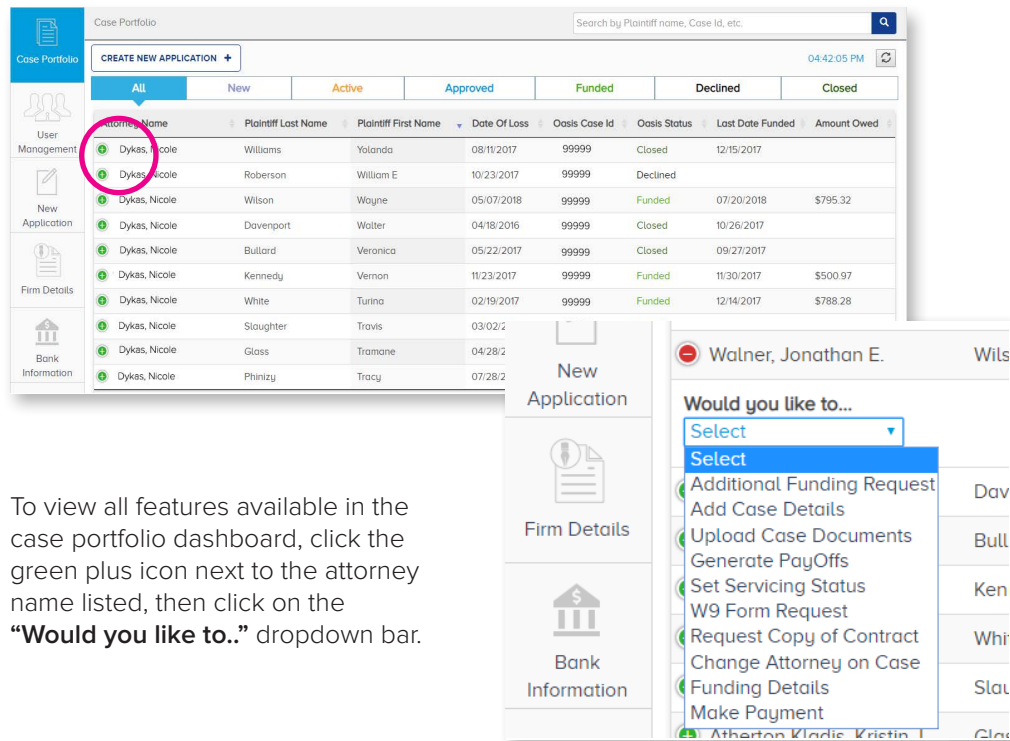
A mockup of the Oasis Financial login form is shown within a grey rounded rectangle. At the top of the form is the title "Login" in a blue sans-serif font. Below the title are two input fields: the first is labeled "Username" with a person icon to its left, and the second is labeled "Password" with a key icon to its left. Below these fields is a link labeled "Forgot Password?". Underneath the link is a reCAPTCHA section containing a checkbox labeled "I'm not a robot" and the reCAPTCHA logo. To the right of the reCAPTCHA logo are the links "reCAPTCHA" and "Privacy - Terms". At the bottom of the form is a large blue button labeled "Sign In" in white text.

Manage Existing Cases

Under the Case Portfolio tab, you will be able to manage all your clients cases with Oasis including making online payments, requesting additional fundings or copy of contracts, adding and uploading case details and documents, viewing current or future payoffs, reopening cases, setting servicing status, and changing the assigned attorney on case. All of your current or past cases with us will be prepopulated the first time you log into the attorney portal.

To view and manage all cases with Oasis, click the **“Case Portfolio”** tab.

In the case portfolio dashboard you will find all new, active, approved, funded, declined, and closed cases..

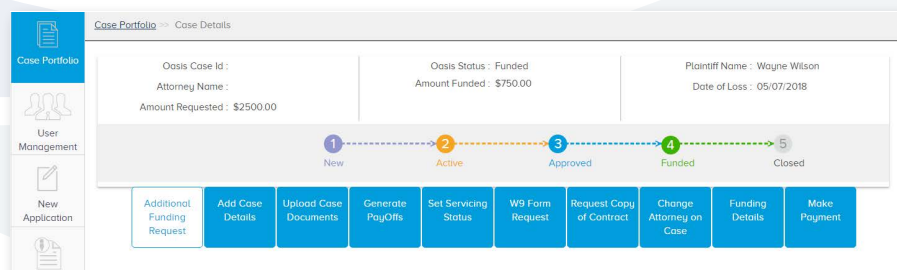


The screenshot shows the 'Case Portfolio' dashboard. On the left is a sidebar with icons for Case Portfolio, User Management, New Application, Firm Details, and Bank Information. The main area has a search bar and tabs for All, New, Active, Approved, Funded, Declined, and Closed. Below these is a table of cases with columns: Attorney Name, Plaintiff Last Name, Plaintiff First Name, Date Of Loss, Oasis Case Id, Oasis Status, Last Date Funded, and Amount Owed. A green plus icon next to the first attorney name is circled in red. A dropdown menu is open next to the attorney name 'Walner, Jonathan E.', showing options: Select, Additional Funding Request, Add Case Details, Upload Case Documents, Generate PayOffs, Set Servicing Status, W9 Form Request, Request Copy of Contract, Change Attorney on Case, Funding Details, and Make Payment.

Attorney Name	Plaintiff Last Name	Plaintiff First Name	Date Of Loss	Oasis Case Id	Oasis Status	Last Date Funded	Amount Owed
Dykas, Nicole	Williams	Yolanda	08/11/2017	99999	Closed	12/15/2017	
Dykas, Nicole	Roberson	William E	10/23/2017	99999	Declined		
Dykas, Nicole	Wilson	Wayne	05/07/2018	99999	Funded	07/20/2018	\$795.32
Dykas, Nicole	Davenport	Walter	04/18/2016	99999	Closed	10/26/2017	
Dykas, Nicole	Bullard	Veronica	05/22/2017	99999	Closed	09/27/2017	
Dykas, Nicole	Kennedy	Vernon	11/23/2017	99999	Funded	11/30/2017	\$500.97
Dykas, Nicole	White	Turina	02/19/2017	99999	Funded	12/14/2017	\$788.28
Dykas, Nicole	Slaughter	Travis	03/02/2				
Dykas, Nicole	Glass	Tramane	04/28/2				
Dykas, Nicole	Phinizy	Tracy	07/28/2				

To view all features available in the case portfolio dashboard, click the green plus icon next to the attorney name listed, then click on the **“Would you like to..”** dropdown bar.

Once you have selected a task from the “Would you like to...” menu, you will be taken to a case detail page with a simple dashboard to help you complete your desired task.



The screenshot shows the 'Case Details' page. It displays case information: Oasis Case Id, Attorney Name, Amount Requested (\$2500.00), Oasis Status (Funded), Amount Funded (\$750.00), Plaintiff Name (Wayne Wilson), and Date of Loss (05/07/2018). Below this is a progress bar with five steps: 1 New, 2 Active, 3 Approved, 4 Funded, and 5 Closed. At the bottom are buttons for various actions: Additional Funding Request, Add Case Details, Upload Case Documents, Generate PayOffs, Set Servicing Status, W9 Form Request, Request Copy of Contract, Change Attorney on Case, Funding Details, and Make Payment.

Example-Generate Payoffs

To generate a payoff on a funded case, first, click the **“Case Portfolio”** and search for the client by name or case ID.

The screenshot shows the 'Case Portfolio' interface. At the top, there is a search bar labeled 'Search by Plaintiff name, Case Id, etc.' which is circled in pink. Below the search bar, there are tabs for 'All', 'New', 'Active', 'Approved', 'Funded', 'Declined', and 'Closed'. The 'Funded' tab is selected. A table lists cases with columns for 'Attorney Name', 'Plaintiff Last Name', and 'Plaintiff First Name'. The first row shows 'Dykas, Nicole', 'Williams', and 'Yolanda'. A dropdown menu is open for the first row, showing options: 'Select', 'Add Case Details', 'Upload Case Documents', 'Generate PayOffs' (highlighted), 'Set Servicing Status', 'W9 Form Request', 'Request Copy of Contract', 'Change Attorney on Case', and 'Funding Details'. The dropdown also shows the case details: 'Walner, Jonathan E.' and 'White'.

Next, click on the green plus icon next to the desired client's name and select in the drop down menu **“Generate Payoff”**.

Fill out the details and click the **“Display Payoff”** button.

Cannot locate a client? Contact your Oasis Director or payoffs@oasisfinancial.com

Add a New Client

Under **New Application**, you will be able to submit an application for a new client online.

The screenshot shows the 'New Application' form. It has a sidebar with 'Case Portfolio', 'User Management', 'New Application' (selected), 'Firm Details', and 'Bank Information'. The main form has fields for 'Attorney*' (Tim Reckamp), 'Requested Amount*', 'Plaintiff Information' (First Name*, Last Name*, Address1*, Address2*), and 'Firm Details'.

Fill in the details of the case. Required fields are noted with a red star. Fields that are optional help the support team to further manage and process the application and may decrease the need for additional phone calls or information requests.

Once completed click **submit**. You will be able to review the information on the application. Once reviewed, click submit again.

Make Online Payments

To make online payments you must first add your firm's bank information. Under the **Bank Information** tab.

Bank Information

Case Portfolio

User Management

New Application

Firm Details

Bank Information

Bank Account Number*

121000021

Bank Routing Number*

123123123

UPDATE

CANCEL

Fill in the bank account number and routing number and click **“Update”**. After you have added the banking information once, you will not need to again. You are now set to make online payments.

To make an online payment, click the Case Portfolio tab, and search for the client by name or case ID.

Case Portfolio

Search by Plaintiff name, Case Id, etc.

CREATE NEW APPLICATION +

ALL New Active Approved Funded

Attorney Name	Plaintiff Last Name	Plaintiff First Name	Date Of Loss	Oasis Case
Dykas, Nicole	Williams	Yolanda	08/11/2017	99999
Dykas, Nicole	Roberson	William E	10/23/2017	99999

User Management

New Application

Firm Details

Attorney Name

Walner, Jonathan E.

Would you like to...

Select

Select

Additional Funding Request

Add Case Details

Upload Case Documents

Generate PayOffs

Set Servicing Status

W9 Form Request

Request Copy of Contract

Change Attorney on Case

Funding Details

Make Payment

Click on the green plus icon next to the desired client's name and select the drop down menu **“Make payment”**.

Here you will find listed the client's name and the amount owed. After reviewing the information click the **“Pay”** button to make payment. You will receive a confirmation page for successful submitted payment. The payment will take 3 to 5 business days to clear. You can contact your servicing representative for a payment receipt.”

Case Portfolio

Case Details

Oasis Case Id:

Attorney Name:

Amount Requested: \$2500.00

Oasis Status: Funded

Amount Funded: \$750.00

Plaintiff Name: Wayne Wilson

Date of Loss: 05/07/2018

New Active Approved Funded Closed

Additional Funding Request

Add Case Details

Upload Case Documents

Generate PayOffs

Set Servicing Status

W9 Form Request

Request Copy of Contract

Change Attorney on Case

Funding Details

Make Payment

Plaintiff Name: Wayne Wilson

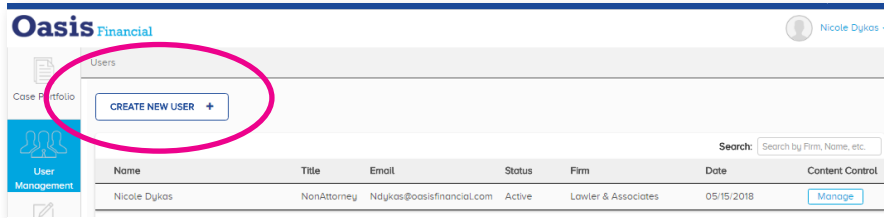
Amount Owed: 795.32

Pay Amount:

Add and Manage Users

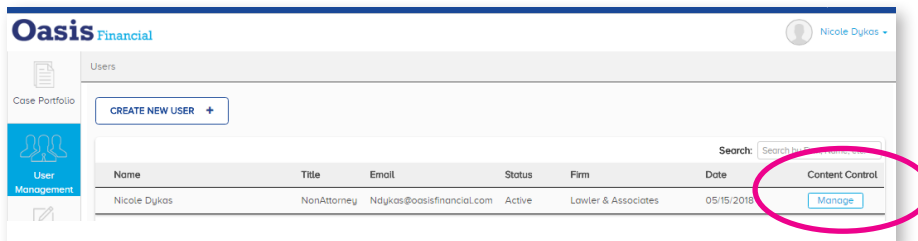
Under **User Management**, if you hold the admin account in your firm, you will be able to add and manage users, and grant rights to what users can view, edit and submit.

To create a new user, click “Create New User” button.



Fill out the details and set permissions on what each user is able to see or utilize on the portal, and click save. The new user will receive a confirmation email within 24 hours.

To manage existing users, click the “Manage” button



To modify permissions on an existing user, select where changes need to be made, and click save.

Update Firm Information

Under **Firm Details**, if you hold the admin account in your firm, you will be able to update firm information such as address, phone number and firm name. You can also personalize your portal, by uploading your firms logo in the section.

The screenshot shows the 'Manage Firm' interface. On the left is a sidebar with icons for Case Portfolio, User Management, New Application, Firm Details (highlighted), and Bank Information. The main form area contains the following fields and options:

- Name: Text input field
- Address Line1: Text input field
- Address Line2: Text input field
- City: Text input field
- State: Dropdown menu
- Zip: Text input field
- URL: Text input field
- Phone Number: Text input field (placeholder: 111-111-1111)
- Fax: Text input field (placeholder: 111-111-1111)
- Enable Payment: Checked checkbox
- Upload Firm Logo here: Section with a 'Choose File' button and a note: '(Please note: The file size should be maximum of 1MB, and should be of type PNG or JPG or GIF)'

At the bottom right of the form are 'SAVE' and 'CANCEL' buttons.

Fill in the details where changes need to be made, and click save.

Looking for Support? Contact Us.

Portal Support: Go to www.myoasis.com/help

Sales Support: Contact your Oasis Director