

Our company was the first lawsuit funding provider in the nation. After over 20 years in business, we receive most of our business from attorneys directly. They have come to trust and rely on us.

User Guide

Attorney Access Portal

Preferred Capital Funding

Preferred Capital Funding

358 W. Ontario St. # 1W
Chicago, IL 60654

(800) 774-7106

<https://www.preferredcapitalfunding.com>

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Introduction

PCF Attorney Access Portal web app for attorneys and law firms can be used to provide necessary documents, check and update various statuses, and efficiently communicate with the lender to support their clients. PCF can assign tasks with numerous categories via this portal; it allows attorneys or paralegals to quickly and easily track and organize all tasks. Law firms are able to search by custom filters such as task description, funding intake number, or category so they can easily organize and switch between to-do tasks. Attorneys and paralegals can search clients with existing open funding to request payoff, look or check borrower provided documents, and start new funding requests. Similarly, attorneys and paralegals can create a new borrower funding request.

If you have any questions not covered in this user guide, please contact the PCF Helpdesk at (800) 774-7106.

Log in

PCF Attorney Access Home Privacy Login

Hey, good to see you again!

Email

Password

Remember me?

Log in

[Forgot your password?](#)

- or connect with -

[LinkedIn](#) [Facebook](#) [Twitter](#)

Friday
Mar 27
National Spanish Paella Day
[more about What is today](#)

Take risks and you'll get the payoffs.
Learn from your mistakes until you succeed.
It's that simple.
Bobby Flay

3 quick tips to better protect your account

- Use unique passwords in the places where you do business
- Enroll in two-factor authentication
- Ensure your contact information is up-to-date

Users who have previously registered for the PCF Attorney Access Portal web app must log in by:

- Entering their Email
- Entering their Password
- Selecting “Log in” button to advance to the next screen and begin using the portal

Also, if users have previously configured themselves with their social sign-in provider authentication such as LinkedIn, Facebook, or/and Twitter then they can log in by clicking the proper button with social sign-in name using an external authentication.

Site Registration

Users who have not previously registered for the PCF Attorney Access Portal web app must contact PCF at (800) 774-7106. Currently, the user registration part is only handled by PCF IT Security team. PCF will send an invitation email to setup. The user can setup by clicking “click here” link from the email.

[PCF Attorney Access](#) [Home](#) [Privacy](#)

Setup account

Confirm your account and setup up your password.

Email address

Full name

Phone number

Password

Confirm password

Forgotten Passwords

If a user forgets his or her password, they must select “Forgot your password?” or they can contact PCF Helpdesk.

Forgotten Password Help (Step 1)

[PCF Attorney Access](#) [Home](#) [Privacy](#)

Forgot your password?

Enter your email.

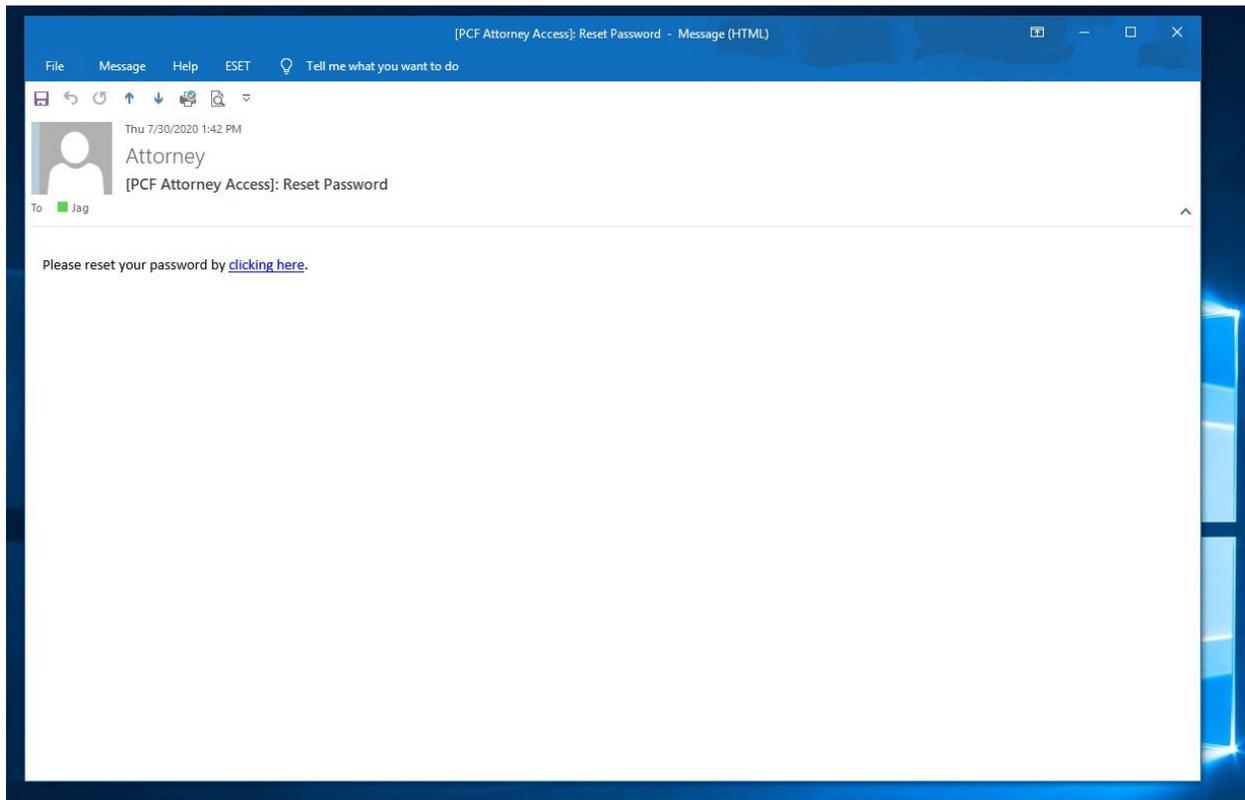
Email

[Reset Password](#)

Users who have forgotten their password may request that it be e-mailed to them by:

- Entering their E-mail address
- Selecting Reset Password button to advance to the next screen and receive further instruction

Forgotten Password Help (Step 2)



Users should receive an email to reset their password link (users may need to check their Junk email folder):

- Select “clicking here” to advance to the next screen and receive further instruction.

Reset password

Reset your password.

Email

Password

Confirm password

Reset

To reset a forgotten password the user will be prompted with their email and new password question. Users must answer the questions correctly in the proper fields and press Reset when completed:

- Enter e-mail address
- Enter new password
- Enter new password for confirmation

PCF Attorney Access Portal Home Page

Account Overview

PCF Preferred Client
Hi, Attorney Tester
Law Offices of ABC
123 E. Aczodelfg Rd. St. 9002 Chicago, IL 60654

Things to be done:
(search by task description, funding intake #, or category)

Show tasks Search:

My Tasts	Category	
Please sign on Case Promissory Note: Intake# 203368	Prom Note Pending	✓
Please sign on Adobe EchoSign Acknowledgement: Intake# 202113	eSign Acknowledgement	✓
Please provide Payoff status: Intake# 203374	Payoff Status	✓
Please provide a case status report: Intake# 203373	Case Status	✓

Showing 1 to 4 of 4 tasks Previous Next

[New Borrower / Funding](#) [Payoff Request](#) [Contact Us](#)

My borrowers with open case:
(search by name or last 4 digits of social security number)

Show entries Search:

Borrower Name	S.S.#	Request a Payoff	A New Funding Request	Borrower Documents
Auto Test	***9876			
Ben And Jerry	***4444			
Jane Doe	***4321			
John Doe	***1111			
Test Borrower	***1234			

Showing 1 to 5 of 5 entries Previous Next

After logging in on the PCF Attorney Portal web app, the user will proceed to the PCF Attorney Access Portal Home Page. Select the buttons on the right side of this page to do the following:

Request a Payoff — Attorneys or paralegals can request a payoff for a particular client and the payoff statement will be emailed to the recipient.

A New Funding Request — Attorneys or paralegals can start a new funding request for a client with existing open funding.

Borrower Documents — Attorneys or paralegals can check documents provided by a particular client for open funding.

Search by borrower's name or last four digits of the borrower's social security number, the attorneys or paralegals may select requests only for searched client(s).

New Borrower / Funding — Attorneys or paralegals can create a new funding request for a new client.

Payoff Request — Attorneys or paralegals can request a payoff for a client that they couldn't find from the search or just for a general payoff request.

Contact Us — Attorneys or paralegals can send any custom requests related to funding, payoff, to-do task, or technical support.

The following to-do tasks can be completed by using buttons from the left side of the Home page:

- Provide Payoff Status
- Provide Periodical Case Status
- Electronically sign requested documents via Adobe Sign
- Provide a new attorney on Case Promissory Note Pending signature
- Providing Approved Loans Pending Signature
- Update status for other assigned tasks

To send funds using a traditional bank wire attorney will need our bank information, which can be found under “Wiring Instruction” in the top menu.

Handling To-Do Tasks

Account Overview

PCF Preferred Client

Welcome back, Paralegal Tester

Attorney: All Select an Attorney

Law Offices of ABC

123 E. Acbdefgh Rd, St. 9002 Chicago, IL 60654

Things to be done:
(search by task description, funding intake #, or category)

Show tasks Search:

My Tasts	Category	
Please provide a case status report: Intake# 203373	Case Status	<input checked="" type="checkbox"/>
Please provide Payoff status: Intake# 203374	Payoff Status	<input checked="" type="checkbox"/>
Please sign on Adobe EchoSign Acknowledgement: Intake# 202113	eSign Acknowledgement	<input checked="" type="checkbox"/>
Please sign on Adobe EchoSign Acknowledgement: Intake# 203368	eSign Acknowledgement	<input checked="" type="checkbox"/>
Please sign on Case Promissory Note: Intake# 203253	Prom Note Pending	<input checked="" type="checkbox"/>
Please sign on Case Promissory Note: Intake# 203279	Prom Note Pending	<input checked="" type="checkbox"/>
Please sign on Case Promissory Note: Intake# 203368	Prom Note Pending	<input checked="" type="checkbox"/>
Please sign on Case Promissory Note: Intake# 203368	Prom Note Pending	<input checked="" type="checkbox"/>
Please sign on Case Promissory Note: Intake# 203370	Prom Note Pending	<input checked="" type="checkbox"/>

Showing 1 to 9 of 10 tasks Previous 2 Next

PCF To-Do gives attorneys or paralegals focus, from work to presentation. Managing tasks in our portal application is more efficient, more powerful, and simply a better way to be more productive to support your clients' needs.

Providing a new attorney on Case Promissory Note Pending signature

New Attorney on Case Promissory Note Pending Signature

Borrower / Client Name: **Ben And Jerry**

S.S.#: *****4444**

Borrower / Client Address: **123 Main Sr**

City: **ton**

State: **Vermont**

ZipCode: **12566**

Phone:

Intake #: **202113**

Attorney: **Attorney Tester**

Status:

- Will provide now uploading a PDF file
- Select an update
- Will provide now uploading a PDF file
- Previously provided by fax
- Previously provided by email
- Other

Next

Complete

Print N

Firm: **L**

Date: **8/12/2020**

E-mail: **paralegal.test@pcfcash.com**

Go Back

Providing annual case status

Case Status Form

Borrower / Client Name: **Auto Test**

S.S.#: *****9876**

Borrower / Client Address: **123**

City: **ewqae**

State: **Illinois**

ZipCode: **12345**

Phone:

Advance #: **0144419A**

Attorney: **Attorney Tester**

1. Case is still open & pending in our office? Yes No

If No, explain:

2. Has suit / claim been filed? Yes No

If Yes, Case Number:

County:

3. Most recent settlement offer: \$

Accepted Rejected

Completed by: **paralegal.test@pcfash.com**

Date: **8/12/2020**

Print Name: **Paralegal Tester**

E-mail: **paralegal.test@pcfash.com**

Firm: **Law Offices of ABC**

Please indicate if you would like future status reports via e-mail: Yes No

Providing Payoff Status

Payoff Status Update

Borrower / Client Name: **Jane Doe**

S.S.#: *****4321**

Borrower / Client Address: **121212**

City: **3423443**

State: **Illinois**

ZipCode: **12345**

Phone:

Intake #: **203374**

Attorney: **Attorney Tester**

An attorney payoff was generated or requested from the attorney office and please update status of the payoff:

Check mailed to PCF	<input type="button" value="Update"/>
Case still pending	
Check mailed to PCF	
Forgot to mail	l.test@pcfash.com Date: 8/12/2020
Waiting on check	Tester E-mail: paralegal.test@pcfash.com
Other	C

Electronic signing acknowledgement for requested document via Adobe Sign

eSign Acknowledgement

Borrower / Client Name: **Ben And Jerry**

S.S.#: *****4444**

Borrower / Client Address: **123 Main Sr**

City: **ton**

State: **Vermont**

ZipCode: **12566**

Phone:

Intake #: **202113**

Attorney: **Attorney Tester**

Preferred Capital Funding requests your signature on
The Loan Agreement # 0129219A for Ben and Jerry

[Review and Sign](#)

!!! This task will be automatically closed after we receive and process your signed document.

Completed by: **paralegal.test@pcfash.com**

Date: **8/12/2020**

Print Name: **Paralegal Tester**

E-mail: **paralegal.test@pcfash.com**

Firm: **Law Offices of ABC**

[Go Back](#)

Request a Payoff

Payoff Request

Borrower / Client Name: **John Doe**

S.S.#: *****1111**

Borrower / Client Address: **123 Cowboy Way Blvd**

City: **Dallassss**

State: **Texas**

ZipCode: **12345**

Phone:

Intake #: **203236**

Attorney: **Attorney Tester**

Borrower / Client Name (required):

John Doe

Requested Payoff Date (required):

08/19/2020

Calendar for August 2020. The date 08/19/2020 is selected. The calendar shows days from 1 to 31. The date 8/12/2020 is marked as 'Today'.

CC: [paralegal.test@pcfash.com](#)

Date: **8/12/2020**

Print Name: **Paralegal Tester**

E-mail: **paralegal.test@pcfash.com**

Firm: **Law Offices of ABC**

[Go Back Home](#)

Custom payoff request

[PCF Attorney Access](#) [Home](#) [Privacy](#)

[Wiring Instructions](#) [Hello paralegal.test@pcfash.com!](#) [Logout](#)

Payoff Request

Borrower / Client Name (required):

Requested Payoff Date (required):

Additional Note (optional):

Send

Completed by: **paralegal.test@pcfash.com**

Date: **8/12/2020**

Print Name: **Paralegal Tester**

E-mail: **paralegal.test@pcfash.com**

Go Back Home

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If a user can't find a client by searching borrower's name or case then the user can use a custom payoff request using the request Payoff button on the top of the right side of the screen.

Request an additional funding for existing open case

New Funding Request

Borrower / Client Name: **Auto Test**

S.S.#: *****9876**

Borrower / Client Address: **123**

City: **ewqae**

State: **Illinois**

ZipCode: **12345**

Phone:

Intake #: **203373**

Attorney: **Attorney Tester**

Amount requested:

Case type:

What is the date of accident?

What is the court number? What county is the case filed in?

What is the total amount of medical bills?

Are there any issues? (liability, extent of injury, etc)

What is the defendant's name?

Request a new funding for a new borrower

New Borrower and New Funding Request

Borrower / Client Name

Borrower / Client Phone:

Borrower / Client Email:

Funding Complaint File State:

Amount requested:

Case type:

Completed
Print Name
Firm: **Law**

- Auto
- Auto
- Personal Injury
- Worker's Comp
- MedMal
- Wrongful Death

Date: **8/12/2020**
E-mail: **paralegal.test@pcfash.com**

Viewing borrower provided documents

Borrower Documents

Borrower / Client Name: **Ben And Jerry**
S.S.#: *****4444**
Borrower / Client Address: **123 Main Sr**
City: **ton** State: **Vermont** ZipCode: **12566**
Phone:
Intake #: **202113**
Attorney: **Attorney Tester**

Show docs Search:

Received	Document	Loan # (PCF Internal)	
2/3/2017 11:06:00 AM	Echosigned Loan Doc	397820	
2/3/2017 11:06:00 AM	Echosigned Audit Doc	397820	

Showing 1 to 2 of 2 docs Previous Next

Completed by: **paralegal.test@pcfash.com** Date: **8/12/2020**
Print Name: **Paralegal Tester** E-mail: **paralegal.test@pcfash.com**
Firm: **Law Offices of ABC**

[Go Back Home](#)

Changing Attorney to support

Account Overview

PCF Preferred Client

Welcome back, Paralegal Tester

Attorney: Attorney Tester
Law Offices of ABC
123 E. Acodelph Rd. St. 9002 Chicago

Select an Attorney

- All
- Raymond S. Smith

Things to be done:
(search by task description, funding intake #, or category)

Show tasks Search:

My Tasks	Category	
Please provide a case status report: Intake# 203373	Case Status	<input checked="" type="checkbox"/>
Please provide Payoff status: Intake# 203374	Payoff Status	<input checked="" type="checkbox"/>
Please sign on Adobe EchoSign Acknowledgement: Intake# 202113	eSign Acknowledgement	<input checked="" type="checkbox"/>
Please sign on Case Promissory Note: Intake# 203368	Prom Note Pending	<input checked="" type="checkbox"/>

Showing 1 to 4 of 4 tasks Previous Next

[New Borrower / Funding](#) [Payoff Request](#) [Contact Us](#)

My borrowers with open case:

(search by name or last 4 digits of social security number)

Show entries Search:

Borrower Name	S.S.#	Request a Payoff	A New Funding Request	Borrower Documents
Auto Test	***9876	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ben And Jerry	***4444	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jane Doe	***4321	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
John Doe	***1111	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Borrower	***1234	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Showing 1 to 5 of 5 entries Previous Next

If a paralegal works with multiple attorneys, he or she can select an attorney, or all attorneys to assist. Clicking “Select an attorney” drop down box under the welcoming message at the top of the left screen, they can change attorney to support. To-do tasks and the borrower list will be filtered based on this selection.

Managing Your Account

Modifying Profile

Manage your account

Change your account settings

Profile	Profile
Email	Username paralegal.test@pcfash.com
Password	Full name Paralegal Tester
External logins	Attorney ID 8
Two-factor authentication	Assistant ID 3387
Personal data	User Type Paralegal
	Phone number 987-654-3210
	<input type="button" value="Save"/>

After successfully logging in, the user can manage his or her account by clicking email address, the second item from the right top menu. Using Profile menu from left side, the user can change full name and phone number.

Manage your account

Change your account settings

Profile	Manage Email
Email	Email
Password	<input type="text" value="paralegal.test@pcfash.com"/> ✓
External logins	New email
Two-factor authentication	<input type="text" value="paralegal.newlastname@pcfash.com"/>
Personal data	<input type="button" value="Change email"/>

From the Manage your account screen, selecting Email menu from left, the user can send verification current email address or change an existing email address.

Manage your account

Change your account settings

Profile	Change password
Email	Current password
Password	<input type="password" value="....."/>
External logins	New password
Two-factor authentication	<input type="password" value="....."/>
Personal data	Confirm new password
	<input type="password" value="....."/>
	<input type="button" value="Update password"/>

From the Manage your account screen, selecting Password on the left, the user can change their password.

Tips for password:

- Don't use a password that someone else can guess or a password that you also use for other accounts.
- Create a password that is unique, that you can remember without having to write it down, and is either a long phrase or contains letters, numbers, and characters.
- Change your password often (every 90 - 120 days).

Adding/Removing external social authentication

PCF Attorney Access [Home](#) [Privacy](#)

[Wiring Instructions](#) [Hello paralegal.tester@pcfash.com!](#) [Logout](#)

Manage your account

Change your account settings

[Profile](#)

[Email](#)

[Password](#)

[External logins](#)

[Two-factor authentication](#)

[Personal data](#)

Add another service to log in.

[LinkedIn](#)

[Facebook](#)

[Twitter](#)

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From the “Manage your account” screen, selecting External logins, allows the user to connect then social media accounts such as LinkedIn, Facebook, and/or Twitter. Clicking a button with the social media name, the user can add and allow our app to use authentication from that social site. Once the user allows the portal to use a social account, he or she doesn’t need to login using email and password combination. Instead of login email/password, the user needs to click social app during login.

Manage your account

Change your account settings

Profile

Email

Password

External logins

Two-factor authentication

Personal data

Two-factor authentication (2FA)

Authenticator app

Add authenticator app

PCF Attorney Access portal offers two step verification authorization for better security, but this service is not the default. The users need to configure from “Manage your Account” screen and selecting “Two-factor Authentication”. The user must use Authenticator app on their apple or android phone or tablet to receive a one-time security key.

Manage your account

Change your account settings

Profile	Personal Data
Email	Your account contains personal data that you have given us. This page allows you to download or delete that data.
Password	Deleting this data will permanently remove your account, and this cannot be recovered.
External logins	
Two-factor authentication	
Personal data	Download
	Delete

From the Manage your account screen, selecting Personal data, PCF provides a way for users to download and delete the personal data captured by Attorney Access Portal.

Remember: Deleting Personal data will permanently remove it from your account, and users will no longer have access for your clients' data to support them. Finally, remember deleted data cannot be recovered.

