

Our company is to serve the unique financial needs of you and your clients. Most importantly, we focus on what matters most – low rates, an easy application, a commitment to responsible funding and adherence to the highest ethical standards in the industry.

# User Guide

Attorney Access Portal

Preferred Plaintiff Support

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## Introduction

PPS contracted attorneys and law firms may use the Attorney Access Portal web app to provide necessary documents, check and update various statuses, and efficiently communicate with the lender to support their clients. PPS will assign tasks with numerous categories via this portal and it allows attorneys or paralegals to quickly and easily track and organize all tasks. Searching custom filters by task description, funding intake number, or category so they can easily organize and switch between to-do tasks. As well, attorneys and paralegals can search clients with existing open funding, request payoff, look or check borrower provided documents, and request a new funding. 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 PPS Helpdesk at (800) 774-7106.

## Login

Attorney Access Home Login

Hey, good to see you again!

Email

Password

☐ Remember me?

Log in

[Forgot your password?](#)

- or connect with -

LinkedInFacebookTwitter

Monday  
Aug 15  
National Nachos 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.  
Bobbly 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

[Download the user guide](#)

Users who have previously registered for the PPS Attorney Access Portal web app must login 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 previously configured themselves their social sign-in provider authentication such as LinkedIn, Facebook, or/and Twitter then they can login clicking a proper button with social sign-in name using an external authentication.

## Site Registration

Users who have not previously registered for the PPS Attorney Access Portal web app must contact PPS. Currently, the user registration part is only handled by PPS IT Security team.

## Forgotten Passwords

If a user forgets his or her password, he or she must select “Forgot your password?”. Or he or she needs to contact PPS Helpdesk.

### Forgotten Password Help (Step 1)

[Attorney Access](#)   [Home](#)

# Forgot your password?

Enter your email.

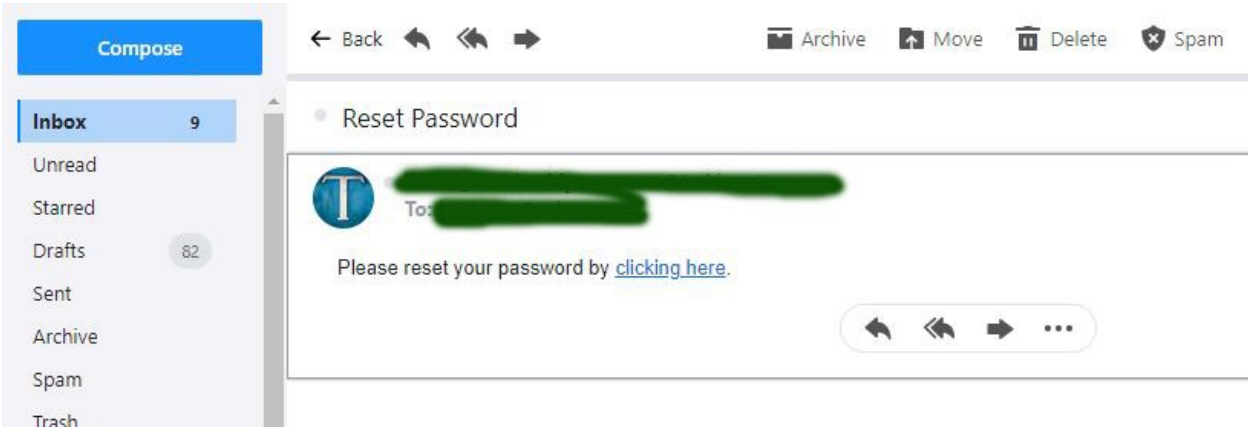
Email

Submit

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 their further instruction.

## Forgotten Password Help (Step 2)



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

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

# Reset password

Reset your password.

Email

testing@tester.test

Password \*

must have at least one lowercase letter, one capital letter, one number, and  
one symbol and minimum 8 characters

.....|

Confirm password

Reset

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

- Entering their E-mail address.
- Entering new Password.
- Entering new Password for confirmation.

# PPS Attorney Access Portal Home Page

[Attorney Access](#) [Home](#) [Wiring Instructions](#) [Hello test.test@testing.pps!](#) [Logout](#)

## Account Overview

**PPS Preferred Client**

Hi, Allison Lazette-Magnan

Mike Morse Law Firm  
24901 Northwestern Hwy, Suite 700, Southfield, MI 48075

### Things to be done:

(search by task description, funding intake #, or category)

Show  tasks Search:

My Tasks	Category
Congratulations! You've completed all of your Things To Do tasks.	
Showing 0 to 0 of 0 tasks	

[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
Meaghan Steele	***2852			
Natalie Bennett	***6111			

Showing 1 to 2 of 2 entries

[Previous](#)  [Next](#)

After logging into the PPS Attorney Portal web app, the user will advance to the PPS 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.

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

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

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

**New Borrower / Funding** – Attorneys or paralegals can create and request a new funding for the new client.

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

**Contact Us** – Attorneys or paralegals can send any custom request related with funding, payoff, to-do task, or technical support.



Using buttons from left side of the Home page, following to-do tasks can be done:

- Providing Payoff Status;
- Providing Periodical Case Status;
- Electronic signing acknowledgement for requested document via Adobe Sign;
- Providing a new attorney on Case Promissory Note Pending signature;
- Providing Approved Loans Pending Signature;
- Update status of other assigned tasks;

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

## Handling To-Do Tasks

PCF Attorney Access Home Privacy

Wirii

### Account Overview

PCF Preferred Client

Welcome back, Brad1 Doe

Attorney: William Pintas

Select an Attorney ▼

Law Offices of William G Pintas & Associates

123 Main St., Suite ABC2 Chicago, IL 00123

Things to be done:		
(search by task description, funding intake #, or category)		
Show 9 ▼ tasks	Search: <input type="text"/>	
My Tasts ▲	Category	Category ▼
Please sign on Adobe EchoSign Acknowledgement: Intake# 203368	eSign Acknowledgement	✓
Please sign on Adobe EchoSign Acknowledgement: Intake# 203368	eSign Acknowledgement	✓
Please sign on Adobe EchoSign Acknowledgement: Intake# 203421	eSign Acknowledgement	✓
Please sign on Case Promissory Note: Intake# 203253	Prom Note Pending	✓
Please sign on Case Promissory Note: Intake# 203253	Prom Note Pending	✓
Please sign on Case Promissory Note: Intake# 203279	Prom Note Pending	✓
Please sign on Case Promissory Note: Intake# 203368	Prom Note Pending	✓
Please sign on Case Promissory Note: Intake# 203368	Prom Note Pending	✓
Please sign on Case Promissory Note: Intake# 203370	Prom Note Pending	✓

PPS 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.

## New Attorney on Case Promissory Note Pending Signature

Borrower / Client Name: **Carmen Cummings**

S.S.#: **\*\*\*2606**

Borrower / Client Address: **4556 S. Calumet**

City: **Chicago**

State: **Illinois**

ZipCode: **60653**

Phone:

Intake #: **15599**

Attorney: **John Serkland**

Status:

Select an update ▼

Next

Select an update

Complete

Will provide now uploading a PDF file

Print N

Previously provided by fax

Firm: **D**

Previously provided by email

Other

Date: **3/31/2020**

E-mail: **jagdag.e@gmail.com**

Go Back

## Providing periodical case status

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[Wiring Instructions](#) [Hello jagdag.e@gmail.com!](#) [Logout](#)

### Case Status Form

Borrower / Client Name: **Mr. TestIL Tester & Ms. Test Tester**

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

Borrower / Client Address: **123 ABC Str.**

City: **Chicago**

State: **Illinois**

ZipCode: **60654**

Phone:

Advance #: **0129219A**

Attorney: **William Pintas**

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: \$0.00

☐ Accepted ☐ Rejected

mm/dd/yyyy

Completed by: **jagdag.e@gmail.com**

Date: **3/31/2020**

Print Name: **Jagdag Erkhembayar**

E-mail: **jagdag.e@gmail.com**

Firm: **Law Offices of William G Pintas & Associates**

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

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[Submit](#)

## Providing Payoff Status

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### Payoff Status Update

Borrower / Client Name: **Mr. TestIL Tester & Ms. Test Tester**

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

Borrower / Client Address: **123 ABC Str.**

City: **Chicago**

State: **Illinois**

ZipCode: **60654**

Phone:

Intake #: **203368**

Attorney: **William Pintas**

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

Other		Update
Case still pending		
Check mailed to PCF		
Forgot to mail	@gmail.com	Date: 3/31/2020
Waiting on check	hembayar	E-mail: jagdag.e@gmail.com
Other	William G Pintas & Associates	

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## Electronic signing acknowledgement for requested document via Adobe Sign

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[Wiring Instructions](#) [Hello jagdag.e@gmail.com!](#) [Logout](#)

### eSign Acknowledgement

Borrower / Client Name: **Mr. TestIL Tester & Ms. Test Tester**

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

Borrower / Client Address: **123 ABC Str.**

City: **Chicago**

State: **Illinois**

ZipCode: **60654**

Phone:

Intake #: **203368**

Attorney: **William Pintas**

Preferred Capital Funding requests your signature on

The Loan Agreement # 0129219A for Mr. TestIL Tester & Ms. Test Tester

[Review and Sign](#)

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

Completed by: **jagdag.e@gmail.com**

Date: **3/31/2020**

Print Name: **Jagdag Erkhembayar**

E-mail: **jagdag.e@gmail.com**

Firm: **Law Offices of William G Pintas & Associates**

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# Request a Payoff

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## Payoff Request

Borrower / Client Name: **Natalie Bennett**

S.S.#: **\*\*\*6111**

Borrower / Client Address: **5637 Chippewa Dr**

City: **Howell**

State: **Michigan**

ZipCode: **48843**

Phone:

Intake #: **140580**

Attorney: **Allison Lazette-Magnan**

Borrower / Client Name (required):

Natalie Bennett

Requested Payoff Date (required):

08/23/2022



Additional Note (optional):

Calculate

Completed by: **test.tester@testing.pps**

Print Name: **Test Tester**

Firm: **Mike Morse Law Firm**

Date: **8/16/2022**

E-mail: **test.tester@testing.pps**

Go Back Home

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## Custom payoff request

Attorney Access   Home

Wiring Instructions   Hello test.tester@testing.pps!   Logout

### Payoff Request

Borrower / Client Name (required):

Requested Payoff Date (required):

Additional Note (optional):

Send

Completed by: **test.tester@testing.pps**

Print Name: **Test Tester**

Date: **8/16/2022**

E-mail: **test.tester@testing.pps**

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If user can't find searching borrowers name or case then he or she can use a custom payoff request using request Payoff button on the top of right side of the screen.



## Request an additional funding for existing open case

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### New Funding Request

Borrower / Client Name: **Natalie Bennett**

S.S.#: **\*\*\*6111**

Borrower / Client Address: **5637 Chippewa Dr**

City: **Howell**

State: **Michigan**

ZipCode: **48843**

Phone:

Intake #: **140580**

Attorney: **Allison Lazette-Magnan**

Amount requested:

Case type:

[Next](#)

Completed by: **test.test@testing.pps**

Date: **8/16/2022**

Print Name: **Test Tester**

E-mail: **test.test@testing.pps**

Firm: **Mike Morse Law Firm**

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## Request a new funding for a new borrower

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### New Borrower and New Funding Request

Borrower / Client Name

Borrower / Client Phone:

Borrower / Client Email:

Funding Complaint File State: Michigan ▼

Amount requested:

Case type: Auto ▼

[Next](#)

Completed by: **test.test@testing.pps**

Date: **8/15/2022**

Print Name: **Test Tester**

E-mail: **test.test@testing.pps**

Firm: **Mike Morse Law Firm**

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## Viewing borrower provided documents

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### Borrower Documents

Borrower / Client Name: **Meaghan Steele**

S.S.#: **\*\*\*2852**

Borrower / Client Address: **13010 Visger St**

City: **Detroit**

State: **Michigan**

ZipCode: **48217**







Phone:

Intake #: **140668**

Attorney: **Allison Lazette-Magnan**

Show **16** docs

Search:

Received	Document	Loan # (PCF Internal)	
8/9/2022 6:54:00 PM	Police report	283706	
8/12/2022 9:22:00 AM	Signed funding agreement with AA (1220222A)	283706	
8/12/2022 9:22:00 AM	Client ID and bank info (1220222A)	283706	
8/12/2022 11:28:00 AM	Signed funding agreement with AA (1220222A)	283706	
8/12/2022 11:29:00 AM	Client ID and bank info (1220222A)	283706	
8/12/2022 11:55:00 AM	ACH Confirmation (1220222A)	283706	

Showing 1 to 6 of 6 docs

Previous **1** Next

Completed by: **test.tester@testing.pps**

Date: **8/15/2022**

Print Name: **Test Tester**

E-mail: **test.tester@testing.pps**

Firm: **Mike Morse Law Firm**

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## Changing Attorney to support

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### Account Overview

PCF Preferred Client

Welcome back, Irma

Attorney: John Serkland [Select an Attorney](#)

DePaolo Zadeikis [Select an Attorney](#)

309 W. Washington, Ste. 550, Chicago, IL 60606 [Mark DePaolo](#)

#### 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# 15599	Prom Note Pending <input checked="" type="checkbox"/>

Showing 1 to 1 of 1 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
Annala		<input type="button" value="Request a Payoff"/>	<input type="button" value="A New Funding Request"/>	<input type="button" value="Borrower Documents"/>

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

# Managing Your Account

## Modifying Profile

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### Manage your account

Change your account settings

[Profile](#)[Email](#)[Password](#)[External logins](#)[Two-factor authentication](#)[Personal data](#)

#### Profile

Username

test.tester@testing.pps

Full name

Test Tester

Attorney ID

33864

User Type

Attorney

Phone number


Save

After successfully logged in, the user can manage his or her account 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.

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# Manage your account

## Change your account settings

Profile	<b>Manage Email</b>
<b>Email</b>	Email
Password	<input type="text" value="test.tester@testing.pps"/> 
External logins	New email
Two-factor authentication	<input type="text" value="test.tester@testing.pps"/>
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.

## Changing your password

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

[Wiring Instructions](#) [Hello jagdag.e@gmail.com!](#) [Logout](#)

# Manage your account

## Change your account settings

<a href="#">Profile</a>	<b>Change password</b>
<a href="#">Email</a>	Current password
<b>Password</b>	<input type="password"/>
<a href="#">External logins</a>	New password
<a href="#">Two-factor authentication</a>	<input type="password"/>
<a href="#">Personal data</a>	Confirm new password
	<input type="password"/>
	<a href="#">Update password</a>

From the Manage your account screen, selecting Password menu from left, the user can change 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 like every 45 - 90 days.

## Adding/Removing external social authentication

Attorney Access Home

Wiring Instructions Hello test.tester@testing.pps! 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

From the Manage your account screen, selecting External logins, the user can connect 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 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 ikon during login.



## Creating Two-way Authentication

Attorney Access Home

Wiring Instructions Hello test.tester@testing.pps! Logout

### 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

PPS Attorney Access portal offers two step verification authorization for better security but this service is not default. The users need to configure from Manage your account screen selecting Two-factor authentication. Also, the users need to use Authenticator app on their apple or android phone or tablet to receive one-time security key.

# Manage your account

## Change your account settings

[Profile](#)[Email](#)[Password](#)[External logins](#)[Two-factor authentication](#)[Personal data](#)

### Personal Data

Your account contains personal data that you have given us. This page allows you to download or delete that data.

**Deleting this data will permanently remove your account, and this cannot be recovered.**

[Download](#)[Delete](#)

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

**Remember:** Deleting Personal data will permanently remove your account, and you will not have access for your clients' data to support them. Also, those deleted data cannot be recovered!