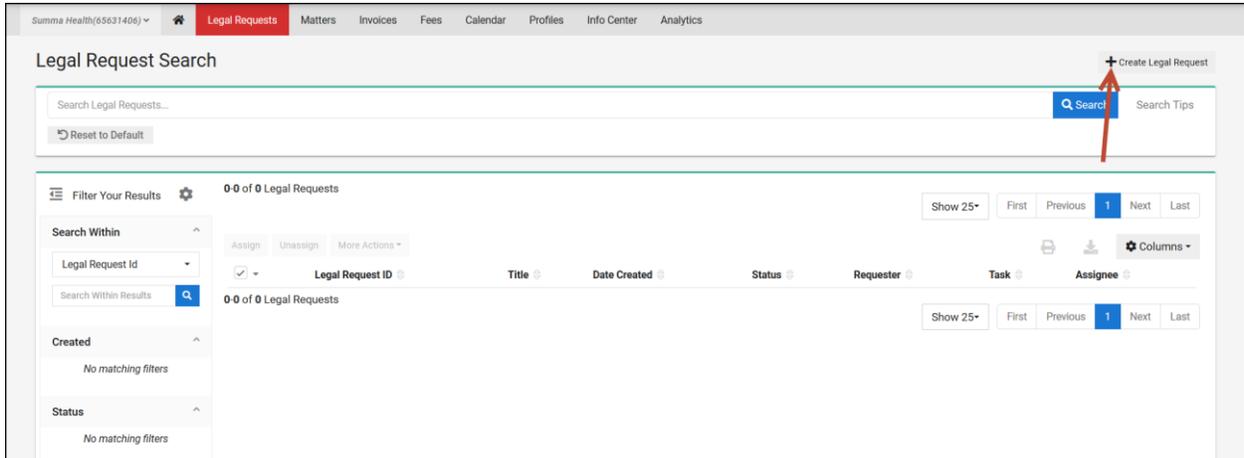


Summa Health – Law Firm Instructions for Legal Requests

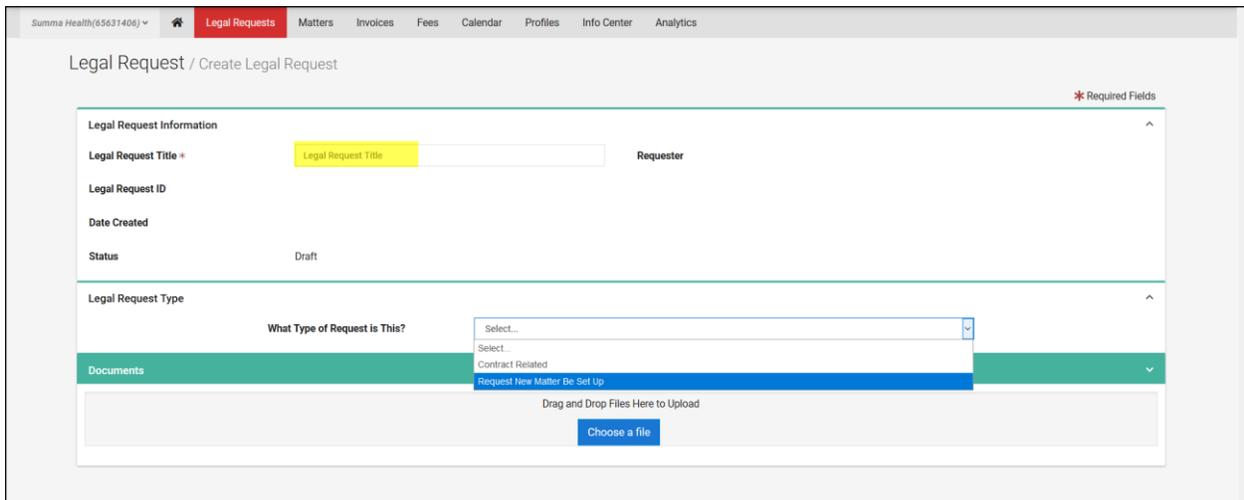
Please follow the steps below to request matters to be opened in CounselLink.

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

- Login to CounselLink www.counselink.net



- Confirm Summa Health is selected in the client drop-down
- Click on Legal Requests Tab
- Click +Create Legal Request



- 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

Name of your Firm *

Lead or Primary Attorney *

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

Law Firm Information

Name of your Firm *

Lead or Primary Attorney *

Matter Type

Summa Requester Information

Business owner requesting this matter *

Matter Details

Description/type of Work

Documents

Drag and Drop Files Here to Upload

Choose a file

- Matter Type (Select from dropdown menu)

Summa Requester Information

Business owner requesting this matter *

Matter Details

Description/type of Work

Documents

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.