MyCase API Skill

How to put it to work with Claude: a guide for lawyers, not developers.

You downloaded a skill: a small folder of instructions you hand to Claude. It teaches Claude how to do one job well; here, how to talk to the MyCase API to create clients, open cases, file documents, log time, and wire your intake form straight into MyCase. You don't need to know how any of that works under the hood. You need to know how to ask Claude to do it. That is the part most people never learn, and it is what this guide is about.

What you need before you start

A version of Claude that can read files and run code. Claude Code, or a Claude project where you can upload the skill folder. A plain chat window can read the files but can't run anything for you. MyCase API credentials. Call or email MyCase support and ask for API access. Tell them you need a client_id, a client_secret, and to register a redirect URI. They issue these per firm; there is no self-serve button. The skill explains where each one goes. Somewhere to run it; your computer or a small server. Claude will tell you what it needs as you go.

Step 1: Hand Claude the skill

Unzip the folder, then point Claude at it in plain English:

YOU

Read the SKILL.md in this mycase-api folder and follow it. We're going to set up a MyCase integration. I'm a lawyer, not a developer; explain things plainly and tell me each thing you need from me.

Claude reads the skill, loads only the parts it needs for the task in front of it, and starts asking for what's missing. From here, you steer.

Step 2; How to talk to Claude (the part people get wrong)

Claude is not a search box and not a form. It works best when you treat it like a sharp junior associate who happens to be a fast coder. Five habits make the difference:

1. Say the goal, not the keystrokes. "I want every paid intake to create a client and open a case in MyCase" gets you further than "write a POST request." 2. Give it your real materials. Paste an actual (de-identified) intake form, a sample matter name, your list of practice areas. Real inputs produce working output. 3. Let it ask, and answer plainly. When Claude needs your staff ID or how you name matters, it will ask. Reply in normal words. 4. Work in steps and test each one. Connect

first. Create one client. Then automate. Don't ask for the whole machine in one breath. 5. When something breaks, paste the exact error. Word for word, not your paraphrase. The error text is how Claude finds the fix in seconds.

COPY-PASTE PROMPTS TO GET GOING

Use these almost verbatim. Replace the bracketed parts with your own.

SET UP

Load the mycase-api skill. Walk me through getting OAuth credentials from MyCase and exactly where to put them. Assume I'm not a developer and keep it step by step.

PROVE THE CONNECTION

Using the skill, write and run a small script that logs into MyCase and prints back my staff ID and my firm's practice areas, so we can confirm it's actually connected.

CREATE ONE CLIENT

Here is a sample intake: [paste a de-identified intake]. Using the skill, create this person as a client in MyCase and show me what came back.

WIRE THE WHOLE PIPELINE

Using the intake-handoff reference in the skill, set it up so a new paid intake creates a lead, converts it to a client, opens a case, and attaches the fee agreement. Build it one piece at a time and let me test each piece before the next.

WHEN IT BREAKS

I ran it and got this error: [paste the exact error]. What's wrong and how do we fix it?

What the skill already handles for you

MyCase has sharp edges that quietly cost people hours. The skill already knows them, so Claude steers around them; you don't have to memorize this list, just know it's covered: Practice area must match MyCase exactly, or it silently Use "clients," never the deprecated "contacts" field on a saves blank; no error thrown. case. Every timestamp needs your timezone offset, or MyCase A 403 means the wrong permission, not the wrong assumes UTC. password. Document download links expire after 60 seconds; Custom fields need their IDs looked up before you can set generate on demand. them.

What a first session actually looks like

You:

Load the mycase-api skill. I want to connect it to my firm. I'm not a developer.

Claude:

Read it. First we need three things from MyCase support: a client_id, a client_secret, and a registered redirect URI. Do you have those yet, or should I draft the email to request them?

You:

Draft the email.

Claude:

[drafts it] Once they reply, paste the three values here and I'll set up the connection and test it with a harmless read, so we know it works before we create anything.

That's the rhythm: you say what you want, Claude tells you the next small thing it needs, you hand it over, it tests as it goes. You stay in charge; it does the typing.

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