Clio Academic Access Program

Student Guidebook

A short guidebook on using Clio in your University Legal Clinic

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Section I: Let's Get Started

Introduction

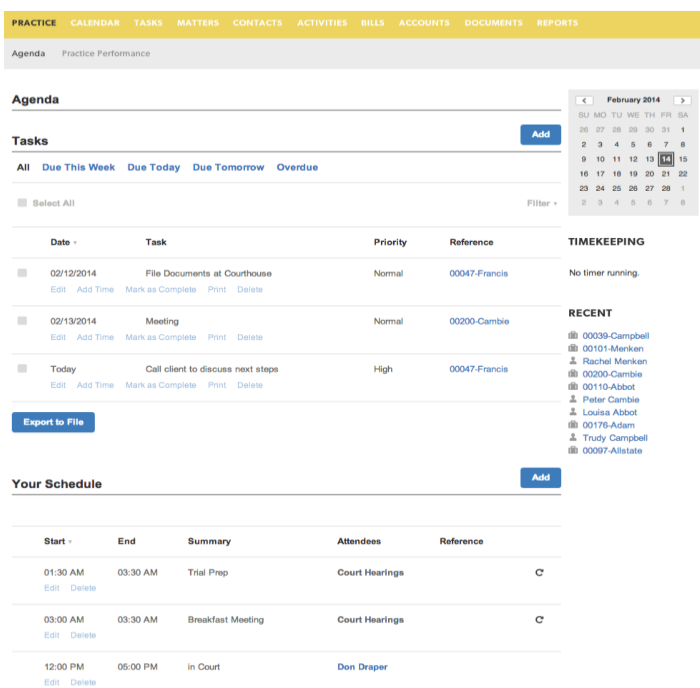
Welcome to Clio! Clio is a web-based legal practice management platform that is popular with many University-operated Legal Clinics throughout North America. Available from any internet-accessible device (Mac, PC, smartphone or tablet), Clio will be your place to keep track of all case information pertaining to your work on behalf of your Clinic program.

Signing into Clio

When signing into Clio, it's always important to ensure that you are using an encrypted connection (look for the lock icon in your web browser). Do not use a public computer, and do not review confidential clinic information in public. You can access Clio at: app.goclio.com.

The Practice Agenda

Your default home page upon signing in is the Practice Agenda; this page is intended to provide an at-a-glance summary of scheduled appointments and Tasks, in order to keep you abreast of important action items and time-sensitive events. At the top of the screen you will see your Tasks, followed by Your Schedule for today and at the bottom of the screen you will see the Firm Feed.



Calendars

By default every user in Clio has access to a personal Calendar and to a firm-wide or "global" Calendar. Within Clio, you can set up as many Calendars as you wish. Each Calendar can be viewed by day, week or month, customized by color and set to appear or be hidden from view.

Creating a New Appointment

To setup a Calendar appointment, simply click and drag the appropriate appointment time frame and populate your appointment details in the dialog that appears. As with most information in Clio, appointments can be optionally linked to Matters by searching for the appropriate name in the 'Matter' field. Simply begin typing the Matter name or associated information, and the field will automatically search and locate relevant Matters from which you can select.

General Information:

1. **Summary:** The Summary is the name/description of the appointment.
2. **Calendar owner:** Choose the owner of the appointment. If it is someone other than yourself, you need to have been given Editor sharing permission from the owner of that Calendar.
3. **When:** Choose the date and time of the event.
4. **"This event will last the whole day":** You can specify that the appointment is an all day event. If so, the appointment will appear at the top of the Calendar on that day.
5. **Matter:** The matter field is there so that you can link the appointment to the applicable matter. It is suggested wherever possible that you link appointments to the correct matter to use Clio to it's fullest extent.
6. **Location:** Use this field to enter in where the appointment is taking place.
7. **Attendees:** You can invite other members of your firm to an appointment. They do not receive a message regarding same, but the appointment will appear in their respective Calendars
8. **Description:** The description field can be used as you see fit to note important details of the event.

Repeats:

You can set up the appointment to repeat on a daily, weekly, monthly or yearly basis.

Reminders:

You can set up a Reminder for appointments by clicking the Add a Reminder link.

Time Entries:

You can simultaneously create a time entry upon creation of the Calendar appointment. Please note that you can only do this for your own appointments, you cannot use this feature on behalf of another user at this time.

Modifying an Event

To edit a Calendar entry, locate the appropriate appointment in any of the day, week, or month views, and click the appointment description. This will reveal the appointment editing form where you can optionally modify and apply any of the event parameters. Make sure you Save your changes.

Calendar Feeds & Syncs

A feed is a push of your Clio Calendar on a regular basis to a third-party calendaring application like Apple iCal or Yahoo. If you make changes in your Clio Calendar you will see this in your calendaring application. However, you cannot make changes in Apple iCal, for example, and have them reflected back to Clio.

A sync can be set up to be bi-directional so if you make changes in one application it shows up in the other. The only applications that Clio currently syncs to are Google and Outlook. Be aware that if you sync Clio with your personal Calendar, all of your personal appointments will show up in Clio; as such, this is not recommended for student users. Try a feed instead!

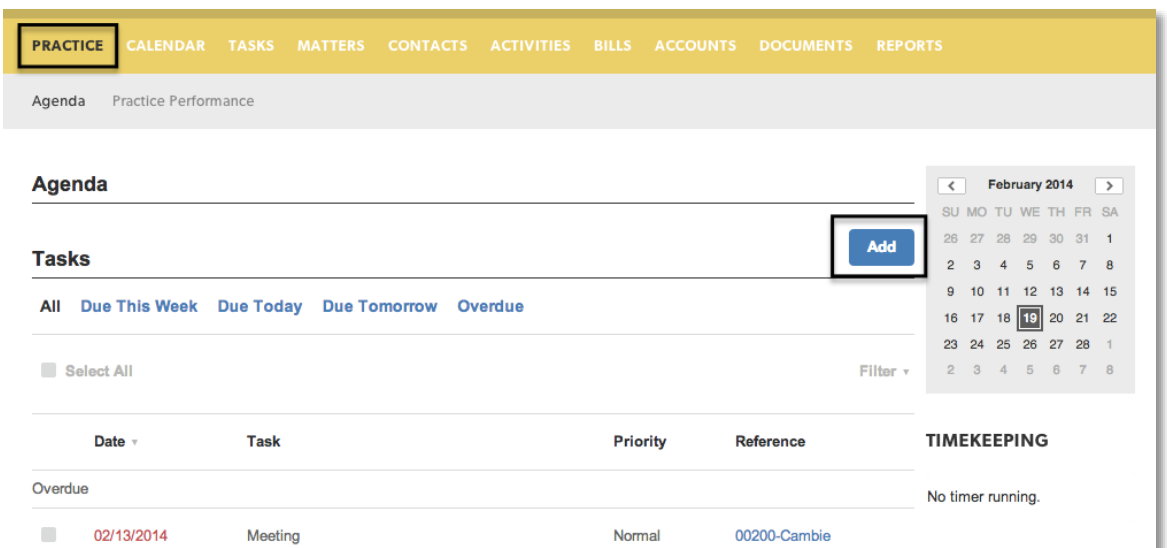
Tasks

Tasks are time-sensitive to-dos that you can assign to yourself, to others, or that others can assign to you. These can be linked to your matters, or left unassigned as required.

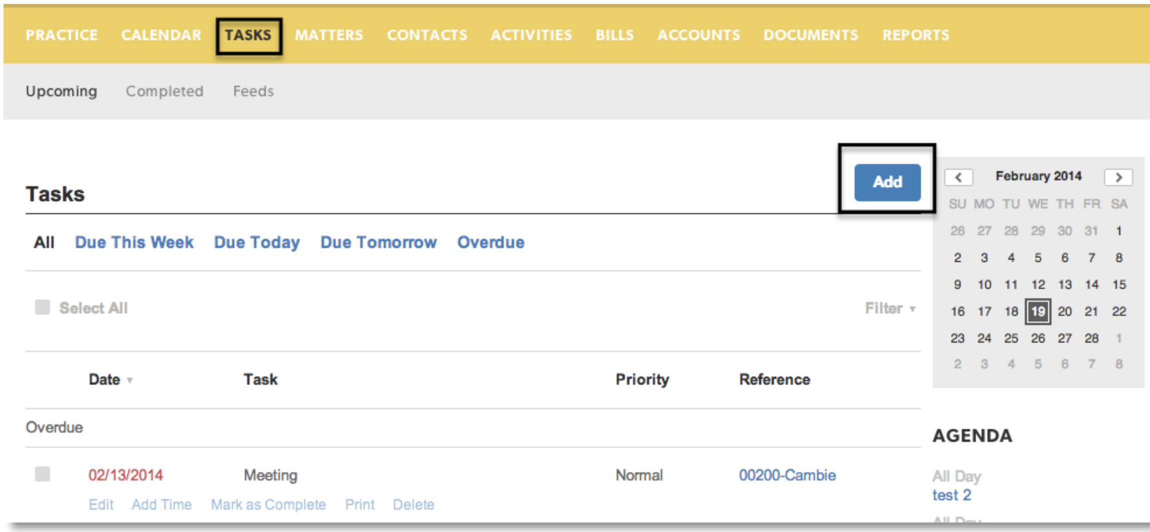
Adding a Task

There are several places within Clio that you can add a Task.

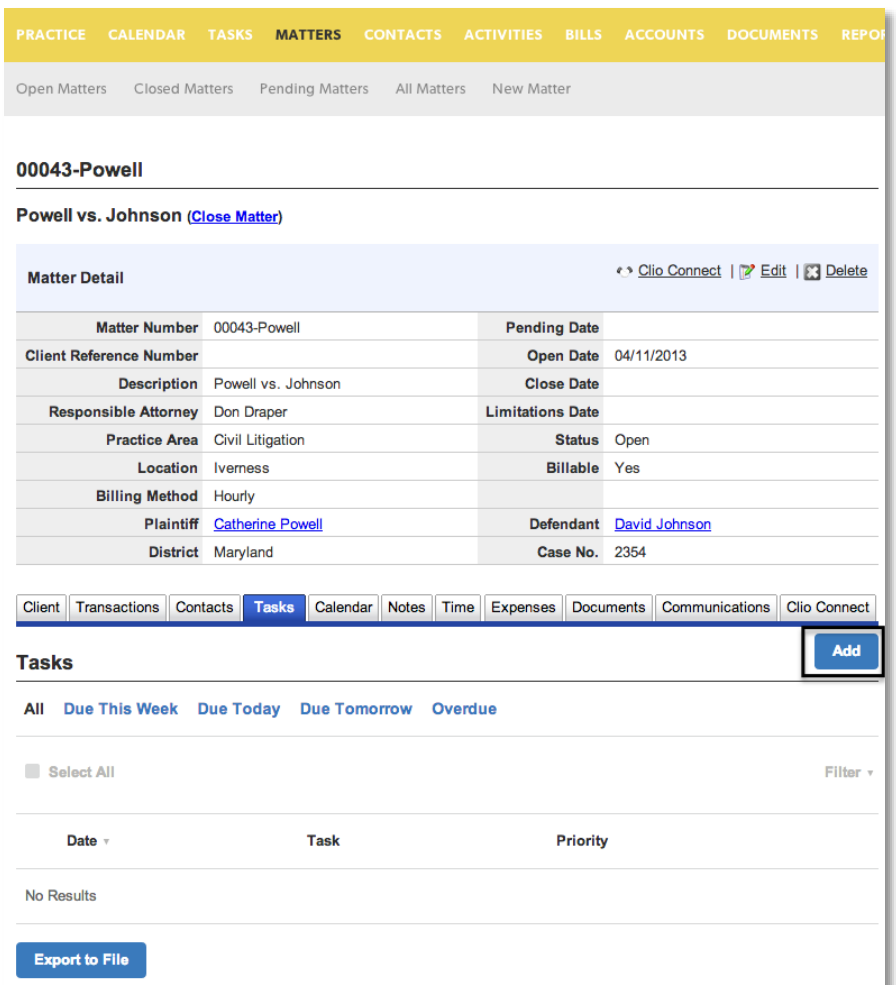
From the Practice screen:



From the Tasks tab:



Within any Matter there is a Tasks subtab:

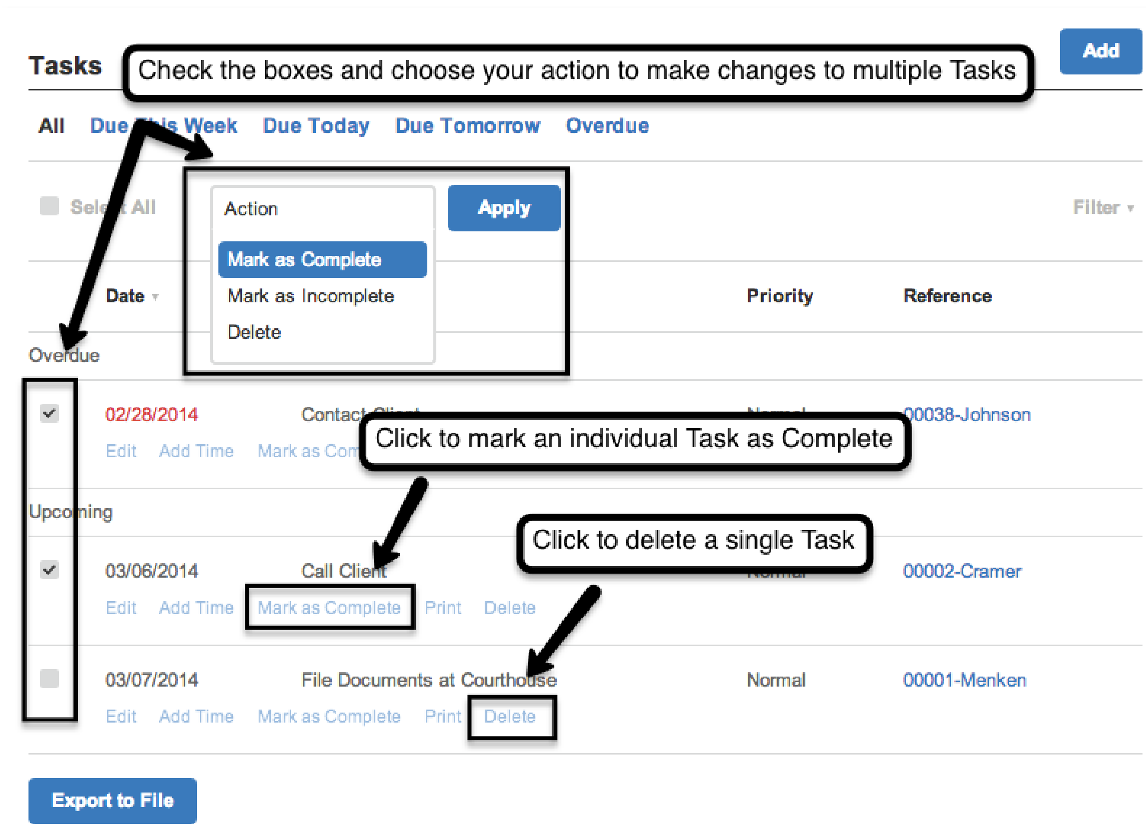


Just click on the "Add" icon and enter the relevant information about the Task.

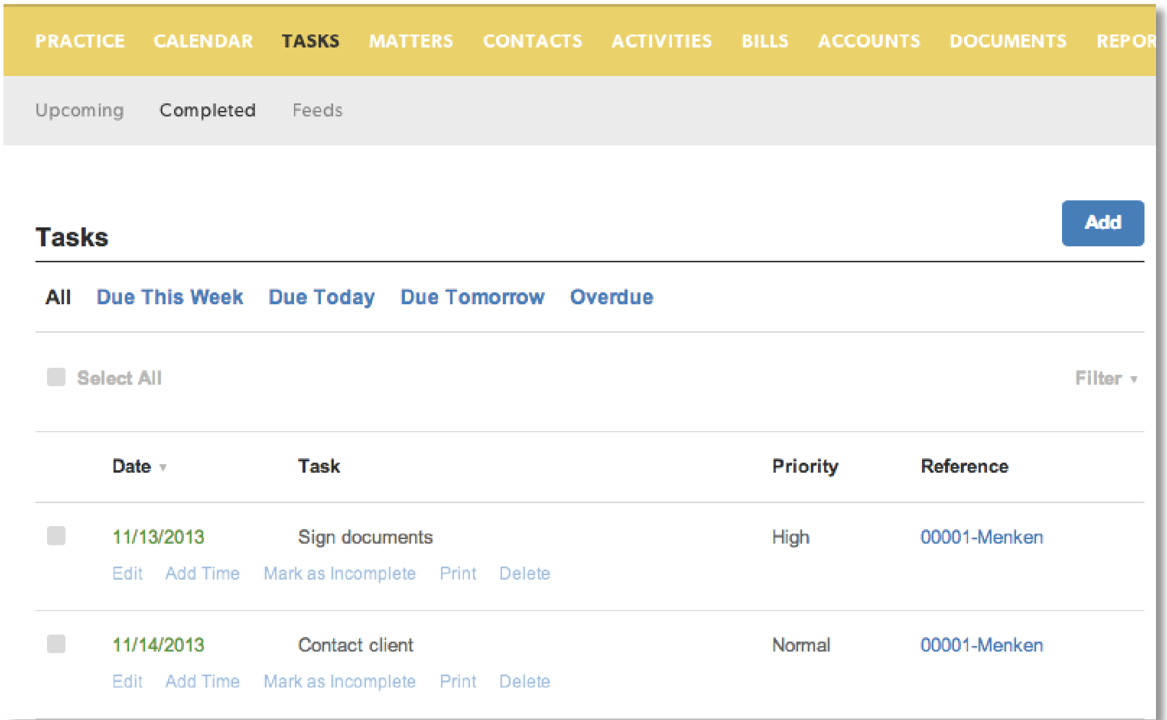
1. **Task Name:** Determine what the Task is called or what is entailed.
2. **Description:** Enter in any additional details regarding this Task.
3. **Assign To:** By default it is yourself, but you can assign the Task to others.
4. **Due Date:** Choose a due date by clicking into this field.
5. **Priority:** Set the appropriate priority level for this Task.
6. **Matter:** Start to type in the name, number or Client name and then choose the appropriate Matter from the dropdown.
7. **Permission:** Set the permission level for the Task: Public to firm members or Private for just yourself.
8. **Reminders:** Add a pop up or email reminder.

Completing a Task

When you have completed work on a task, simply click on the "Mark as Complete" link. You can also mark multiple Tasks as complete by checking the boxes on the left and selecting "Mark as Complete" from the action list dropdown. If you click on the "Delete" link that will permanently delete the task:



Once a task has been marked Complete, you can find it by going to "Tasks" and "Completed":



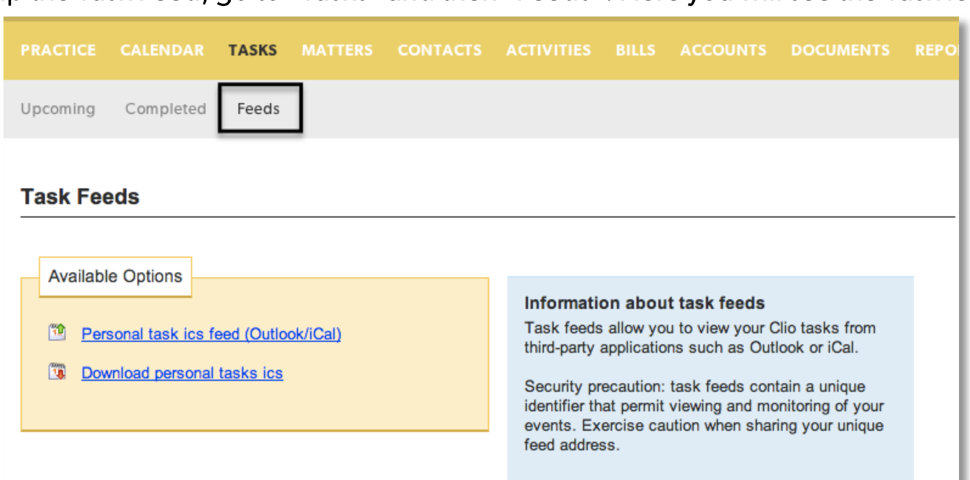
Assign a Task to Other Users

When you are in the task creation form, simply choose the user that is responsible for the task. If you want to view all the tasks that you have assigned to others, go to "Tasks" and click on the “Filter” button. Here you can choose the assignee you would like to review.

Task Feeds

A Task feed is a one-way push of your Tasks to an external calendaring application like Google or Apple iCal. If you are an Outlook user you can bi-directionally sync your tasks between Clio and Outlook.

To set up the Task Feed, go to "Tasks" and then "Feeds". Here you will see the Task feed link:

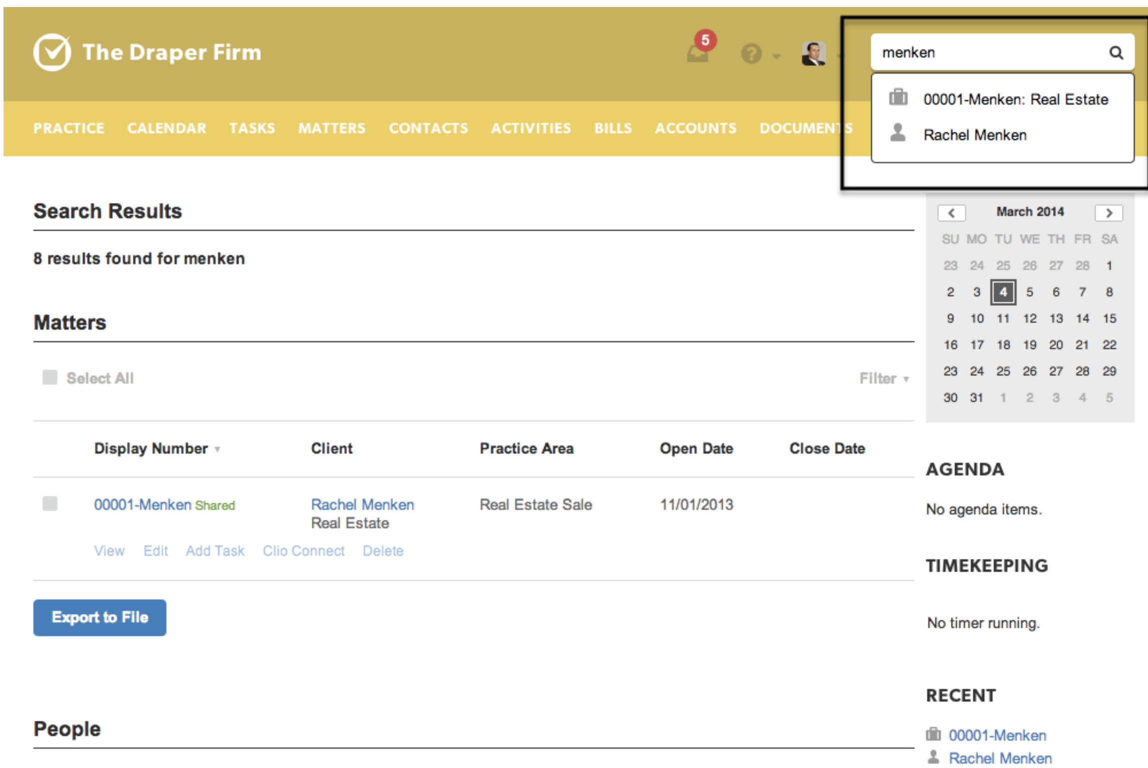


Section II: Important Workflows

Conflict Checking

One of the most important functions that Clio will fulfill for the Legal Clinics is Conflict Checking. Prior to entering a new contact into Clio, it is important to conduct a Conflict Check. Your primary vessel for doing this in Clio is the Global Search bar, located in the top right corner of the screen.

This field searches virtually all of the text-editable fields within Clio, and produces a mini-report detailing all of the locations where a potential source of conflict has been identified based on the content of the query.



In some instances, your search will locate Contacts that do not have any Matters associated with them under the "Matters" or "Related Matters" sub-tabs. If this occurs, the Contact may have a relationship to a Matter you cannot access. Make sure to check with your supervisor or a named administrator on your Clio account to ensure that there is no conflict of interest with a Matter you do not have access to.

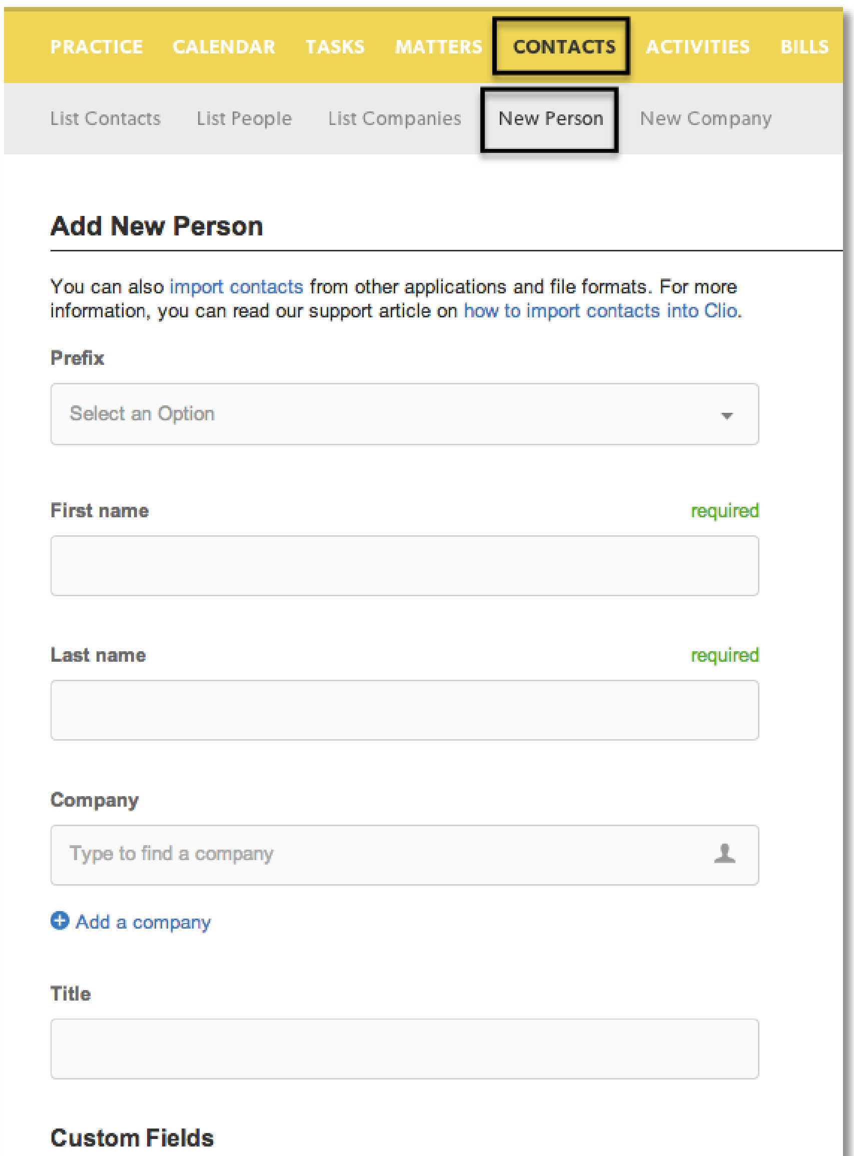
Contacts

Your Contacts are all individuals that you create in Clio, whether they are clients or other people associated with files.

Creating a Contact

Go to Contacts and choose "New Person" or "New Company".

Here you will be required to provide the name of the individual or company, and optionally as many email addresses, phone numbers, instant messengers, web sites and physical addresses as are desired. When creating a new "person" you may wish to associate this new contact with an existing company; the Company field will automatically search your list of existing contacts for relevant results and present you with a list of options from which you can select. If the Company is not already among your list of contacts a new Company record to be created in conjunction with the associated individual.

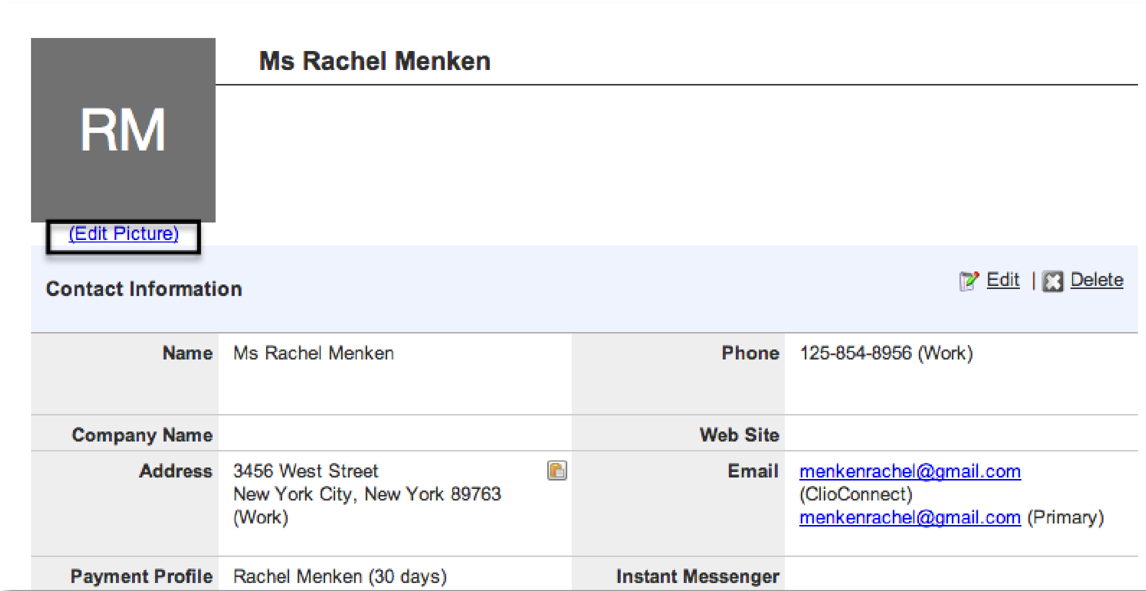


Anatomy of a Contact Card

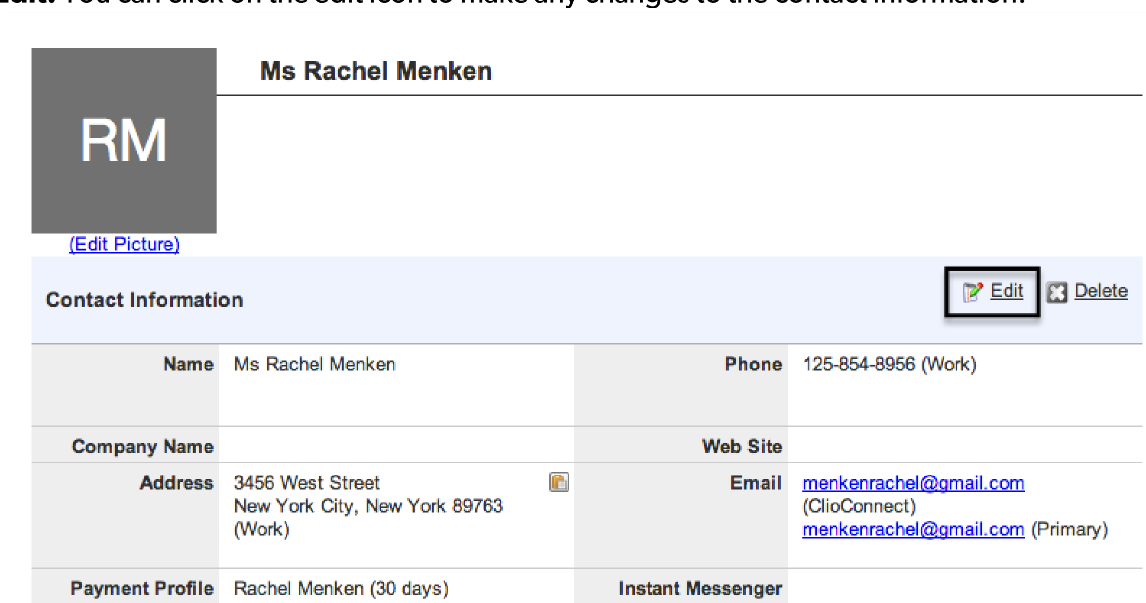
The Contact Card has a lot of useful information, so let's break it down:

Profile Picture (Note: *You will only see the Profile Picture if you have set the client up to use Clio Connect. All other contacts will not have a Profile Picture at this time*)

You can add a profile picture for your contact by clicking on the "Edit Picture" link to change the Avatar or upload your own image (Note: *If your client has access to Clio Connect they will see the image you choose for them. They are able to change it as well*):

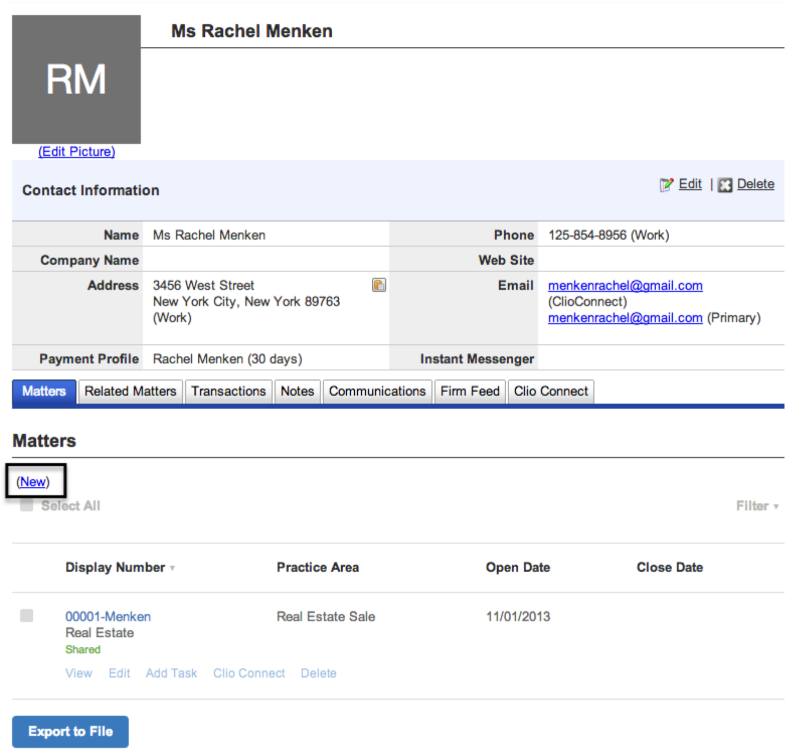


Edit: You can click on the edit icon to make any changes to the contact information.



Delete: You can click on the "X" icon to delete the contact. Please be aware that this is a permanent action, and will be recorded in the firm feed. Do not delete any contacts without authorization from your supervisor.

Contact Card Subtabs



Matters: The Matters tab links all Matters where this contact is a client. You can create a new Matter from here by clicking on the "New" link.

Related Matters: This tab links Contacts to Matters where they are not the client, but have a relationship such as a Judge, Witness, Opposing Counsel, Spouse and so on. To add a relationship to a Matter, go to the "Related Matters" sub-tab in a contact card and click on "Add" and enter the appropriate information.

Notes: The Notes tab within the Contact view enables you to browse, create and modify notes in the context of the current Contact. Notes can serve as a flexible information storage medium, and may serve different purposes in different practices. The Notes field can hold many pages of information, so feel free to enter in as much as you would like!

Communications: Communications allow you to attach emails, create phone logs and send internal/external secure messages and link them to contacts and to matters.

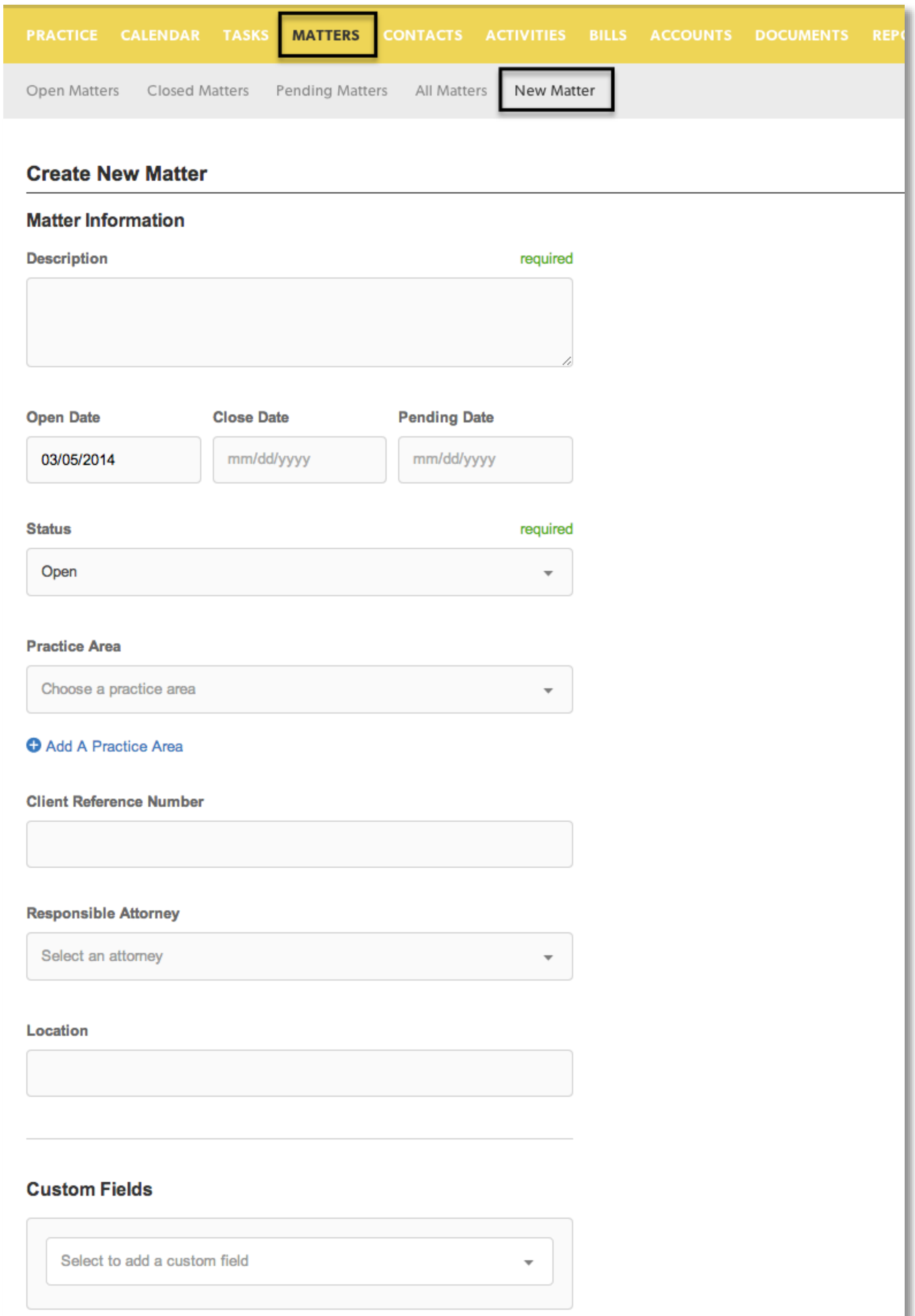
Firm Feed: The Firm Feed will show you everything your client has done in Clio, such as accessing/creating/editing items you've shared with them via Clio Connect.

Clio Connect: You can click here to view all the documents, bills and messages you have shared with the contact.

Matters

Your Matters are your client case files or the issues you are working on for your client. In Clio, everything is linked back to your client matter. When you click on your Matter tab you will see all of your Open Matters. Open Matters are matters that you are currently working on, and will stay 'Open' until you designate them as 'Closed' or 'Pending'.

Creating a Matter



1. Go to **Matters - New Matter**

2. **Description:** Enter the Description of the file (the title, ie: Jones vs. Smith or Purchase of 123 Main Street).

3. **Pending / Open / Close Date:** Enter the Open/Pending/Closed date. Every file has a status of one of these three choices. By default when you open a file it is Open and the Open date will be shown. For more information on Pending files, click here.

4. **Status:** Like Step 3, this is where you determine the file Status.

5. **Practice Area:** You can assign a Practice Area to a Matter. For use in Law Clinics, usually each Practice Area designates a unique Clinic; however it is important to verify with your Clinic's Supervisor how they would like the Practice Area to be assigned.

6. **Client Reference Number:** The client reference number field is intended to facilitate the storage of any tracking details the client may impose on you such as an internal reference number or PO. Populating this field is optional.

7. **Responsible Attorney:** You can optionally assign one Responsible Attorney per matter. This individual must have an attorney subscription class, not a non-attorney.

8. **Location:** The location field is intended to facilitate the storage of locations important to a matter such as the court where trial is set to occur. Populating this field is optional.

9. **Billable:** By default all new files are "Billable". This means that when you add time entries they show up in the New Bill page. For use in Law Clinics, usually this box is unchecked so that you can enter in time and expenses and they do not appear in the New Bill page; it is important to verify with your Clinic supervisor what they prefer.

10. **Matter Client:** Each matter must have a client. If the person already exists, start to type their name and choose them from the dropdown. Otherwise, click on "Click to add new person" or "Add new company" to simultaneously create a new contact card and make them the client.

11. **Statute of Limitations:** You can determine a Statute of Limitations for your matter and this date will appear in your Calendar as well in the Calendar named after same.

12. **Matter Permissions:** You can put a firewall around a Matter so only you or a group of people can see the Matter information. For more information on Matter Permissions, please click here.

When you are finished, click "Save New Matter".

Anatomy of a Matter

Matter Number: This may be set manually or automatically generated by the Clio system. You can contact an account administrator to inquire about these settings if you would like to make a change to the Matter Numbering.

Matter Description: When you create a new file you assign a title/description. You can change this by clicking on "Edit" within a Matter.

Close Matter: You can change the status of a Matter and when you are no longer working on it, click on the link to close it.

Matter Detail: When you create a new matter you will enter the information within the fields. To change this information, click on "Edit" within a matter.

00040-Fields

Divorce (Close Matter)

Matter Detail — Clio Connect | Edit | Delete

Matter Number	00040-Fields	**Pending Date**	02/17/2014
Client Reference Number	149571	**Open Date**	02/27/2014
Description	Divorce	**Close Date**	
Responsible Attorney	Don Draper	**Limitations Date**	08/31/2014
Practice Area	Family	**Status**	Open
Location	New York	**Billable**	Yes
Billing Method	Hourly	**Rates**	Don Draper, $175.00 /hr

Firm Feed: The firm feed offers a running history of important information on a matter.

Firm Feed

Filter

Description

Don Draper received a payment on a bill, '77', for the matter '00040-Fields' 6 days ago.
02/27/2014 02:37 P

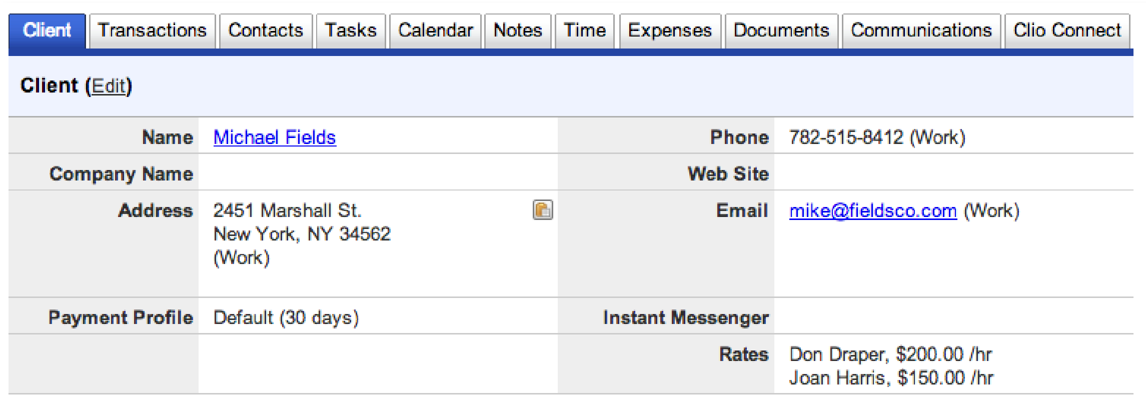
Don Draper updated Time Entry, 'Meeting with Client (09:00 AM - 10:00 AM)', for the matter '00040-Fields' 6 days ago.
02/27/2014 02:31 P

Don Draper created Expense Entry, 'Mileage', for the matter '00040-Fields' 6 days ago.
02/27/2014 02:29 P

Don Draper created Time Entry, 'Chat with the client about the meeting upcoming', for the matter '00040-Fields' 6 days ago.
02/27/2014 02:28 P

Export to File — Previous 1 2 Next

Matter Subtabs



Client: The client sub-tab clearly sets out who your client is. To go to the client's contact card in Clio, simply click on their name.

Contacts: You will have people that are related to a matter that are not the client. They could be primary contact person for a business client, the Judge, Opposing Counsel, Adverse Party, etc. You can go to this tab to create a relationship and link people to the matter.

Tasks: This sub-tab will show you the firm-wide tasks that are linked to this matter. You can create tasks here as well.

Calendar: The Calendar sub-tab will show all Calendar appointments linked to this matter. You can create new appointments here as well.

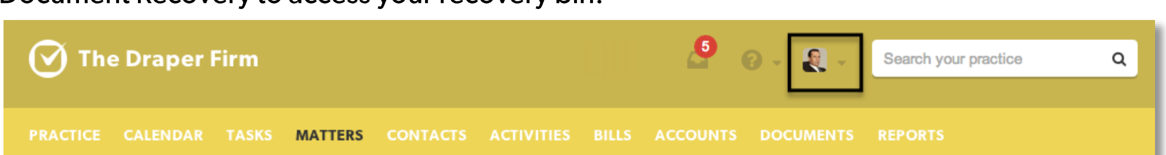
Notes: The notes sub-tab allows you to create notes on any topic within a matter. The notes field holds hundreds of pages of information.

Time: This sub-tab is where you will find the time entries with respect to this matter.

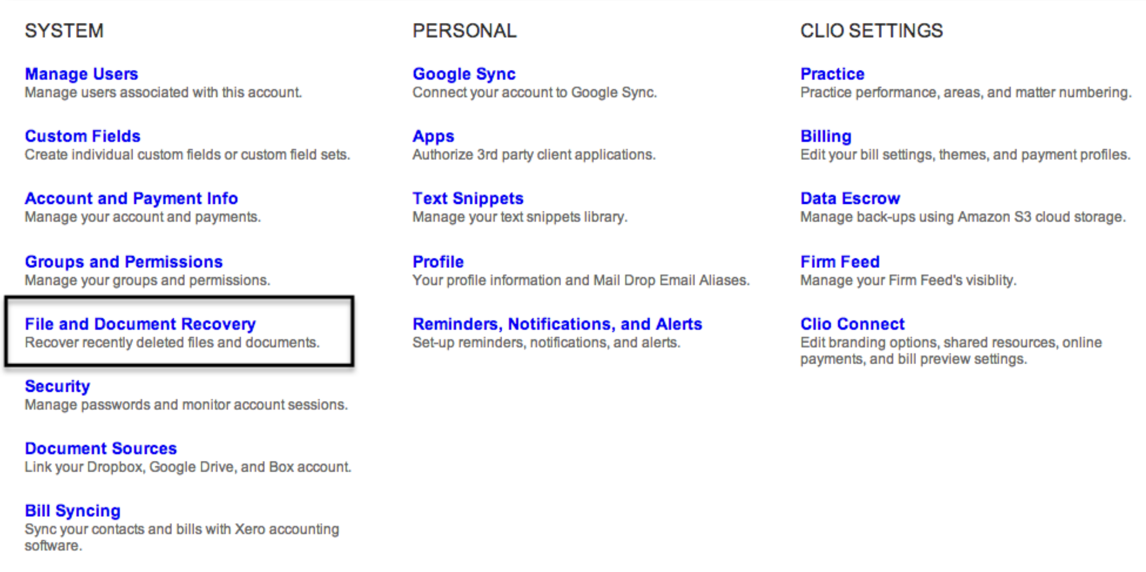
Communications: The communications sub-tab is where you would go to see and create phone call logs, emails and secure messages. For more information on this topic, click here.

Oops – I deleted something by mistake!

If at any point in time you delete an entry in error, you may be able to recover it from the recovery section of the settings menu. Please head to Settings → System → File and Document Recovery to access your recovery bin.



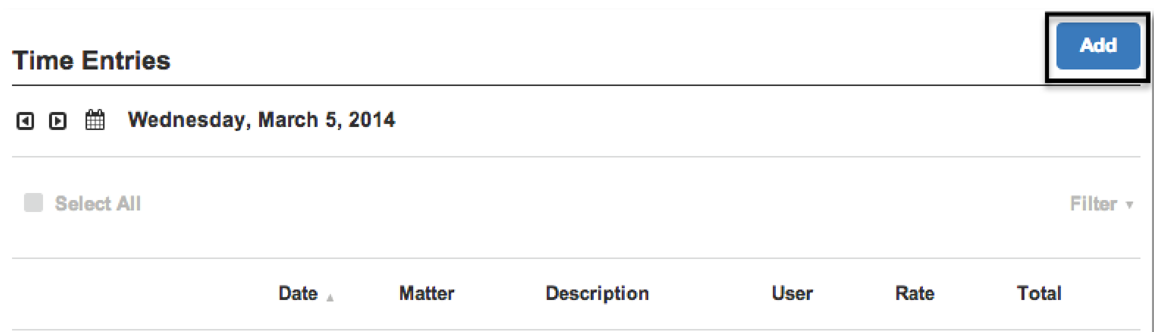
In the settings menu:



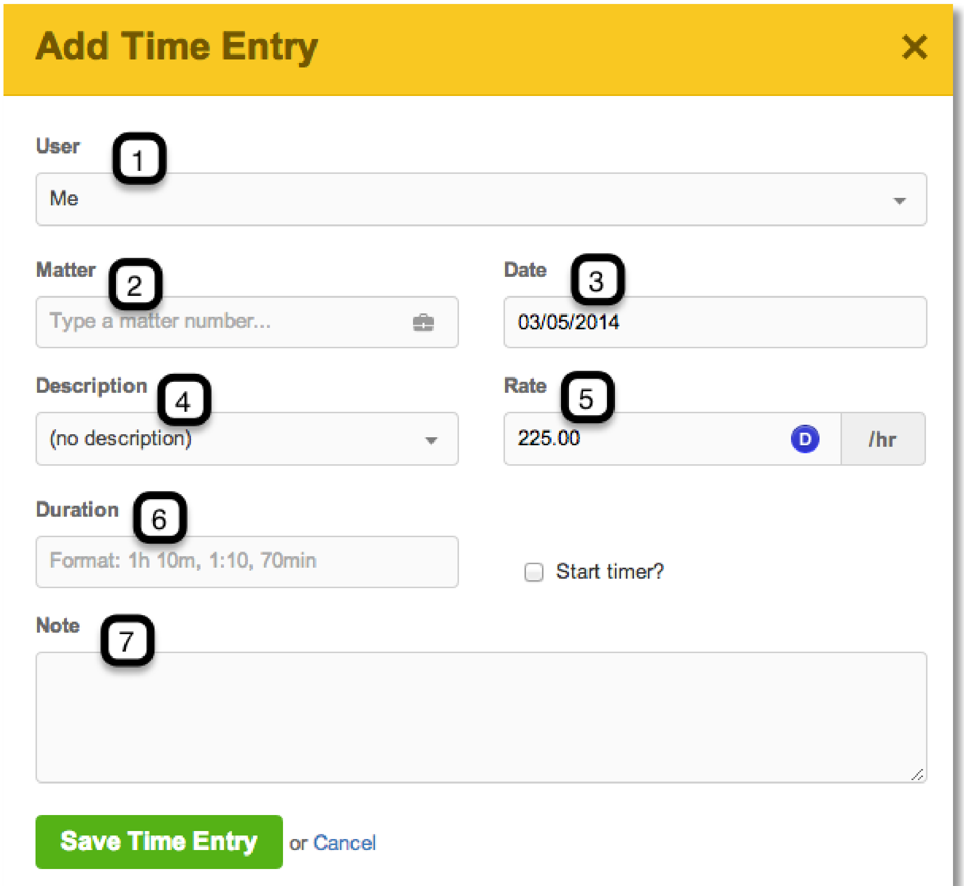
Time Tracking

From the Activities Tab

Go to the Activities tab and the first sub-tab is "Time Entries". These are time entries across all of your matters. To add a new one, click on "Add":

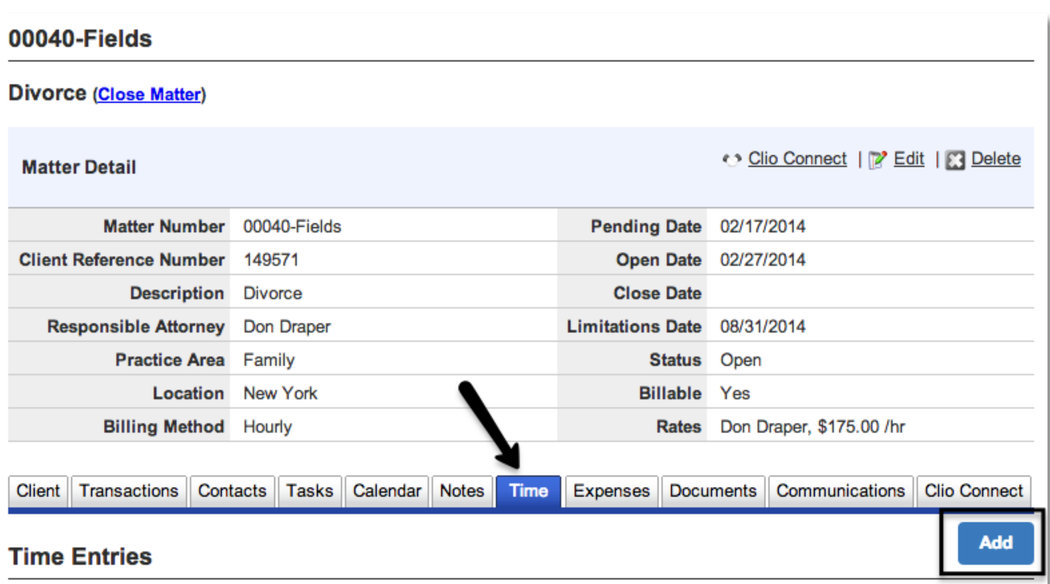


1. **User:** Click "Me" to enter time for yourself, or choose another user's name if you wish to enter time on their behalf;
2. **Matter:** Enter in the Matter by starting to type the name or number. Then choose the matter from the drop down menu;
3. **Date:** Change the date, if applicable;
4. **Description:** Choose the Activity Description or choose the "No Description" at the very top if you do not wish to use one;
5. **Rate:** By default, your rates will be set to $0.00 (for pro bono work);
6. **Duration:** Enter in the duration;
7. **Note:** Enter a more detailed description of what activity you were completing.
8. Hit save, or check start the timer and hit save to continue adding time live!



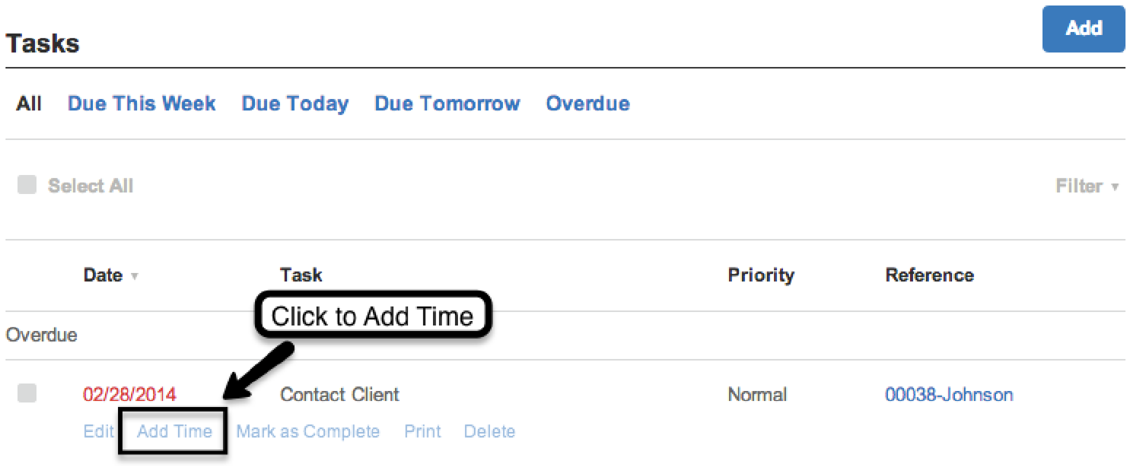
From the Matter Card

You can also enter in time entries on a matter card. To do so, go to the matter in Clio and click on the "Time" tab. From there you follow the same instructions as above.

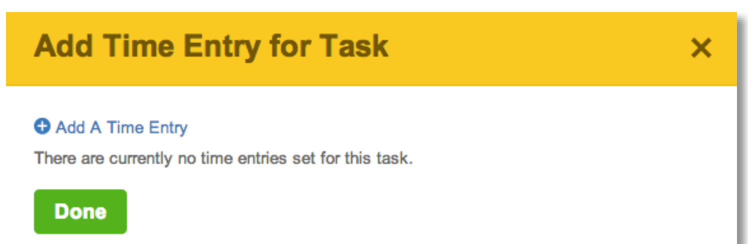


Attaching Time to other Entries

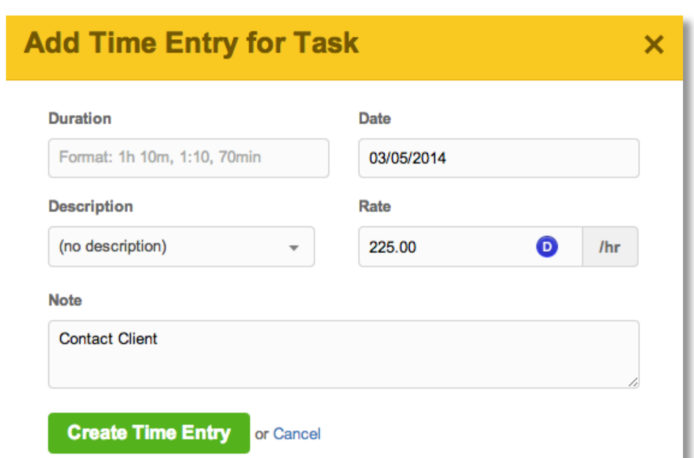
There is also a shortcut link for attaching Time to other entries in Clio; you can use this icon to attach Time to just about any type of entry, including Tasks, Documents, Notes, and Communications:



Clicking "Add Time" will activate a dialog box. Any existing Time Entries will display in this dialogue box, and if there are no existing entries, it will look like the box below.

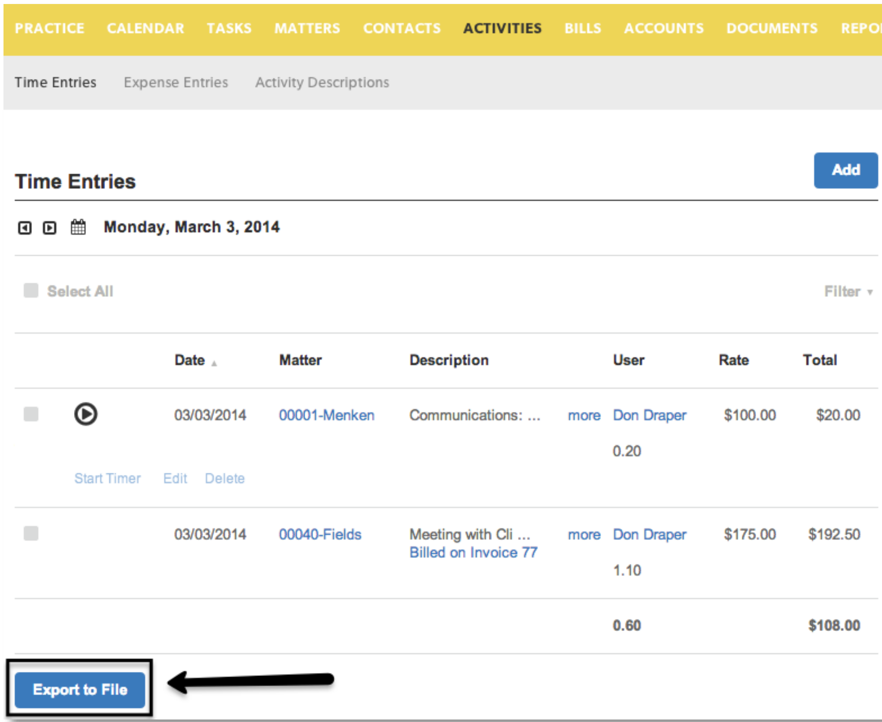


From this page, click "Add a Time Entry".

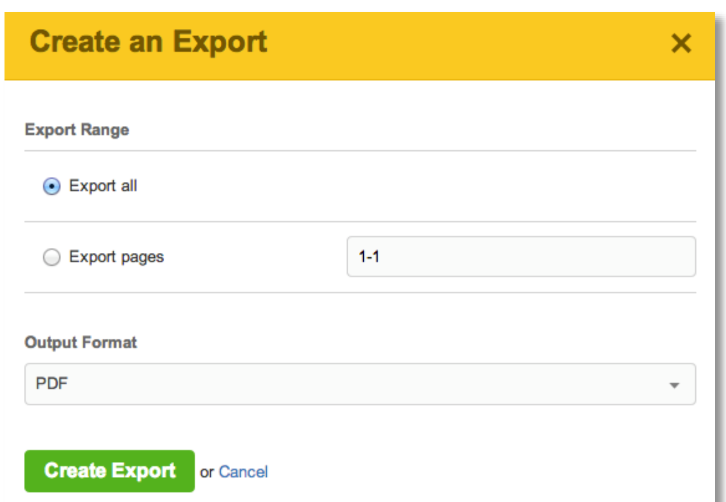


Reporting your Time Entries

Your Clinic may ask you to produce a report or summary of your Time entries in Clio. To do so, you can head to either the Activities tab or to a Matter directly and use the "Export to File" button:



In the next screen you can choose if you want to export all pages or specific ones and in PDF or CSV format. When the export is finished, click on "Download" which will download the file to your computer:



In general, PDF is the way to go if you need to print or email the report, while CSV (Excel-ready spreadsheet) is useful if the recipient of the report needs to use the raw data.

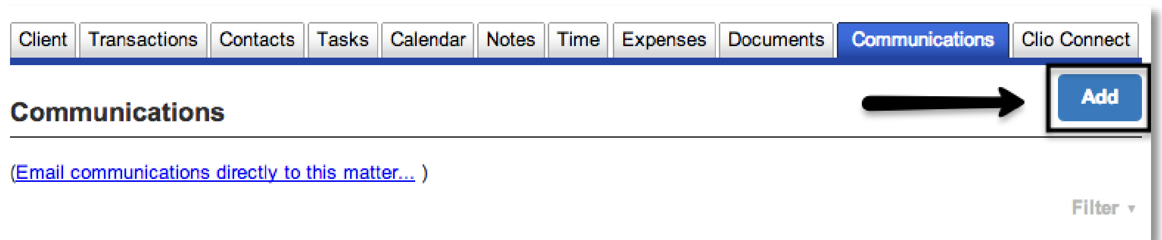
Section III: Documents & Communications

Communications

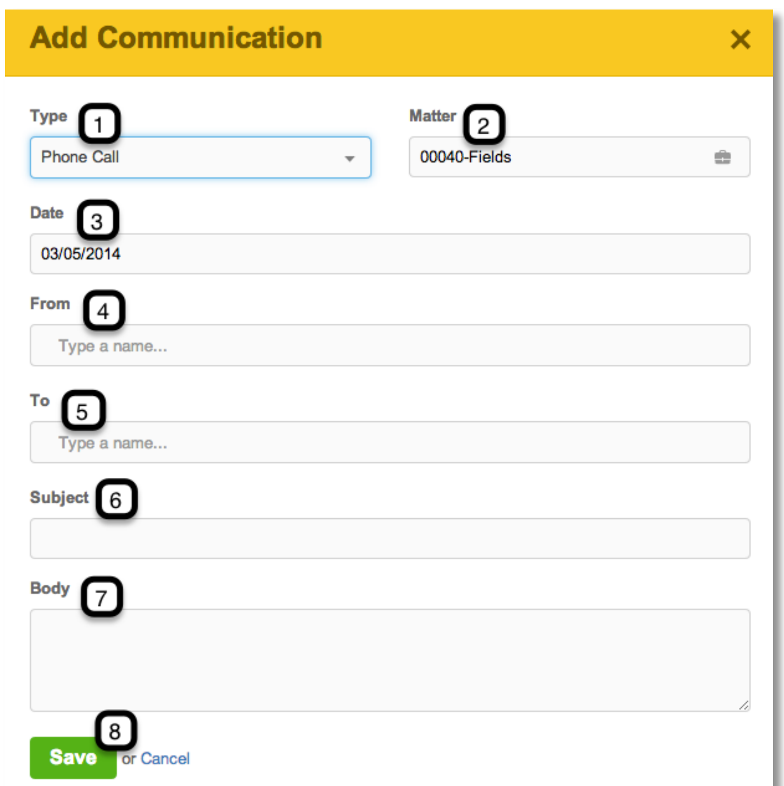
Communications in Clio are divided into three categories: Phone calls, Emails, and Secure Messages. Once recorded, you can attach time to each of these items and they are searchable from the global communications menu.

Phone Calls

First, go to the Communications tab in either the Matter or Contact view and click "Add":



This Dialogue Box will appear:



1. **Type:** Choose Phone Call from the drop down box;

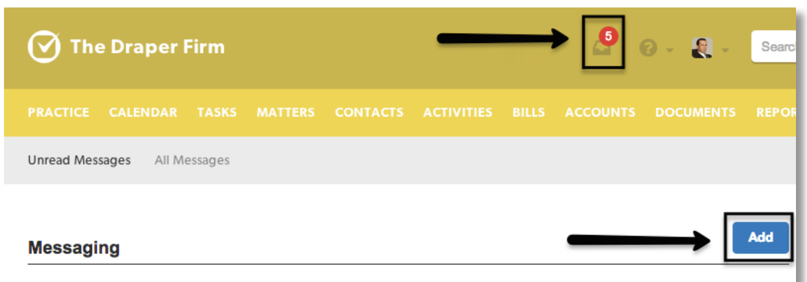
2. **Matter:** Confirm the Matter is correct if you are in Matter screen or start typing it in and choose it from the drop down in the Contact view. If you do not associate a Matter properly it will not appear in the Matter's communication tab;
3. **Date:** Choose the Date of the call;
4. **From:** In the "From" field, start typing in the initiating person's name and choose them from the drop down box. If you do not associate a contact properly it will not appear in the Contact's communication tab;
5. **To:** In the "To" field, start typing in the receiving person's name and choose them from the drop down box.
6. **Subject:** Enter a Subject; and
7. **Body:** Enter in the body.
8. Choose Save.

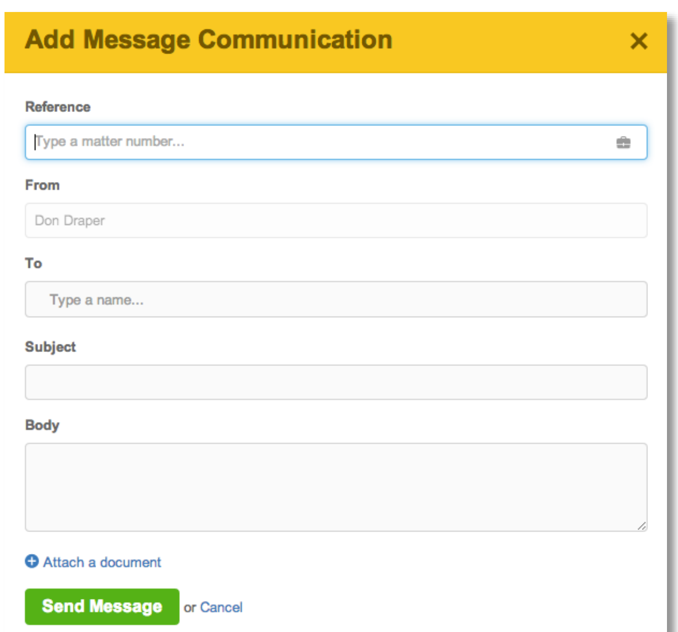
Secure Messages

There are a few ways to send a secure message:

Via the Inbox

To send a message to an internal person (firm member) or a client/contact via the inbox, click on "Inbox" at the top of your screen. From here, choose "Add" and create and send your message:

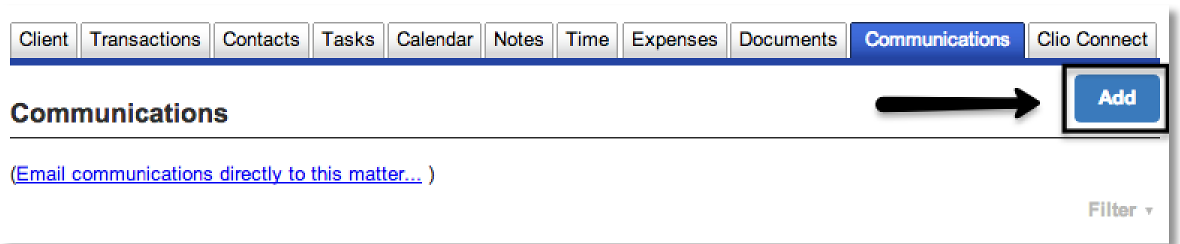




The "From" and "To" fields are linked to individuals in your firm and externally through Clio Connect. So, start to type in the name and then choose it from the dropdown. In order to send a Secure Message to someone they either have to be a User at your firm, or be a Contact with a valid email address to use Clio Connect.

Via the Communications Tab

Go to a matter or contact card, click on "Communications" then click on "Add", then choose Secure Message from the drop down:



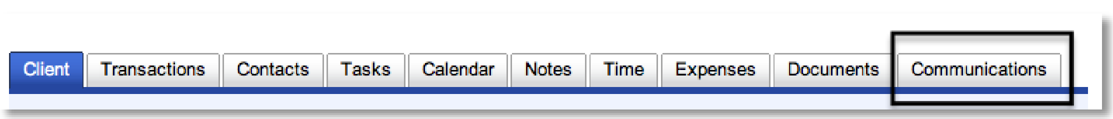
The receiving party can view internal messages by going to their inbox; clients/contacts can view the message via Clio Connect.

E-mails & the Clio Maildrop

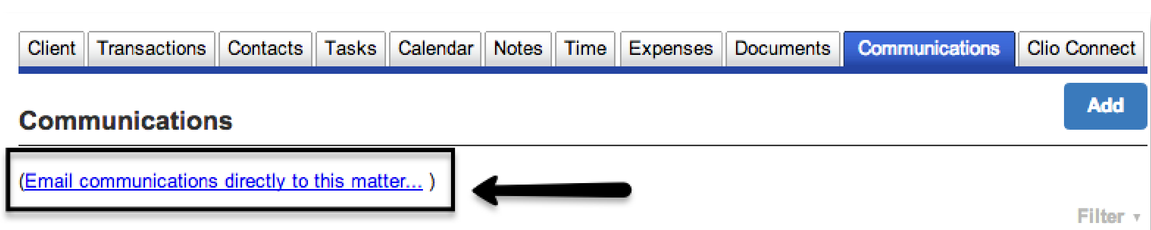
You can send emails to Clio and link them to Matters and Contacts. This provides you with an archive and all firm users can quickly see relevant file emails. There are two ways to send emails to Clio, though we typically recommend using the Matter maildrop if possible.

Via the Matter Maildrop

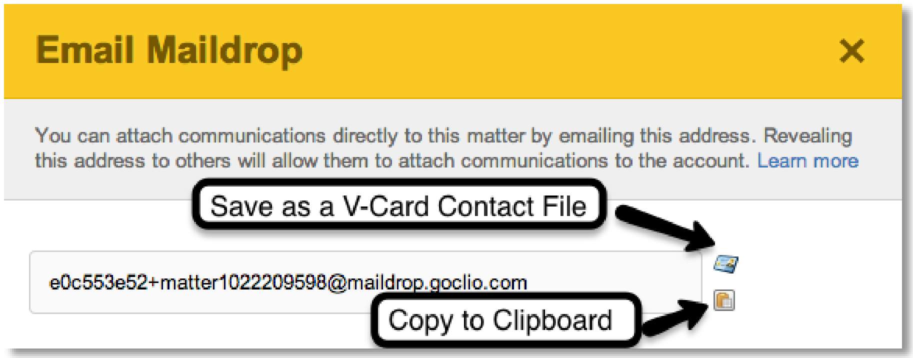
1. View the Matter that you wish to link an email to and click the "Communications" tab:



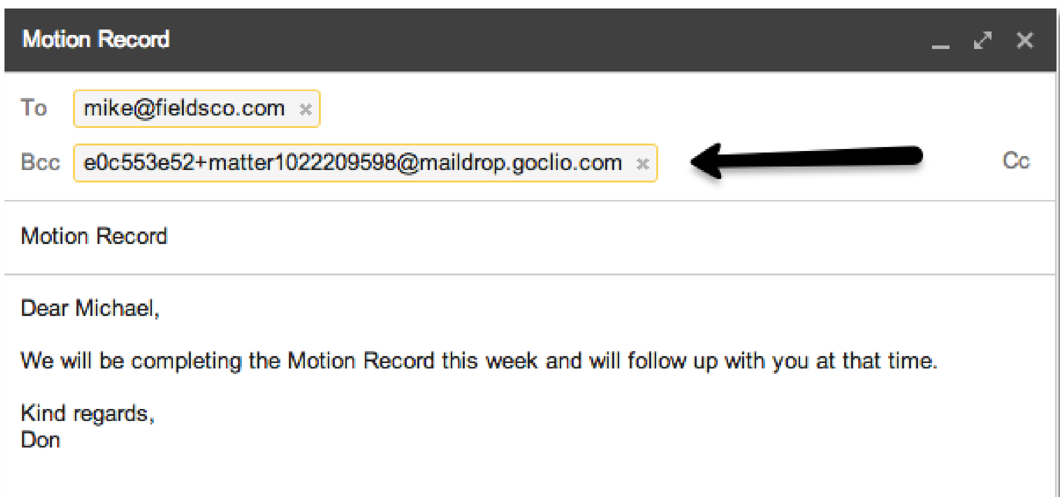
2. Click on the link "Email Communications Directly to this Matter":



3. From there you will see a pop-up box with your special email address. Use the clipboard icon to copy the email address:



4. Go to your email and paste the special email into your Bcc: field with your outbound email and send. You can forward Communications to the Matter Maildrop as well:



Please note: Any attachments will appear in the Documents tab of the receiving Matter.

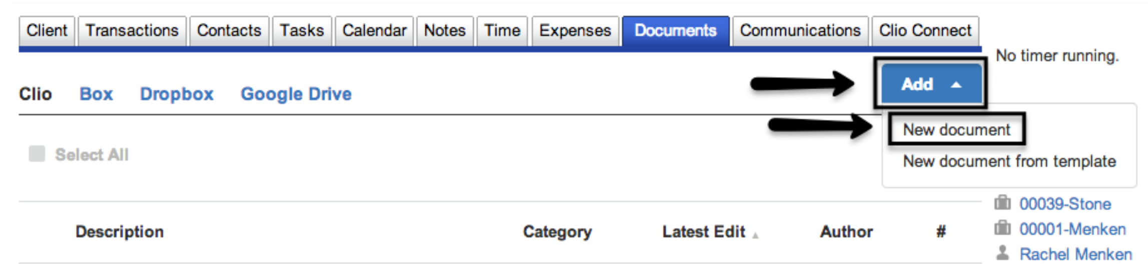
Communications 101 Video

Be sure to check out our [Communications 101 video] for a full walkthrough of communications in Clio.

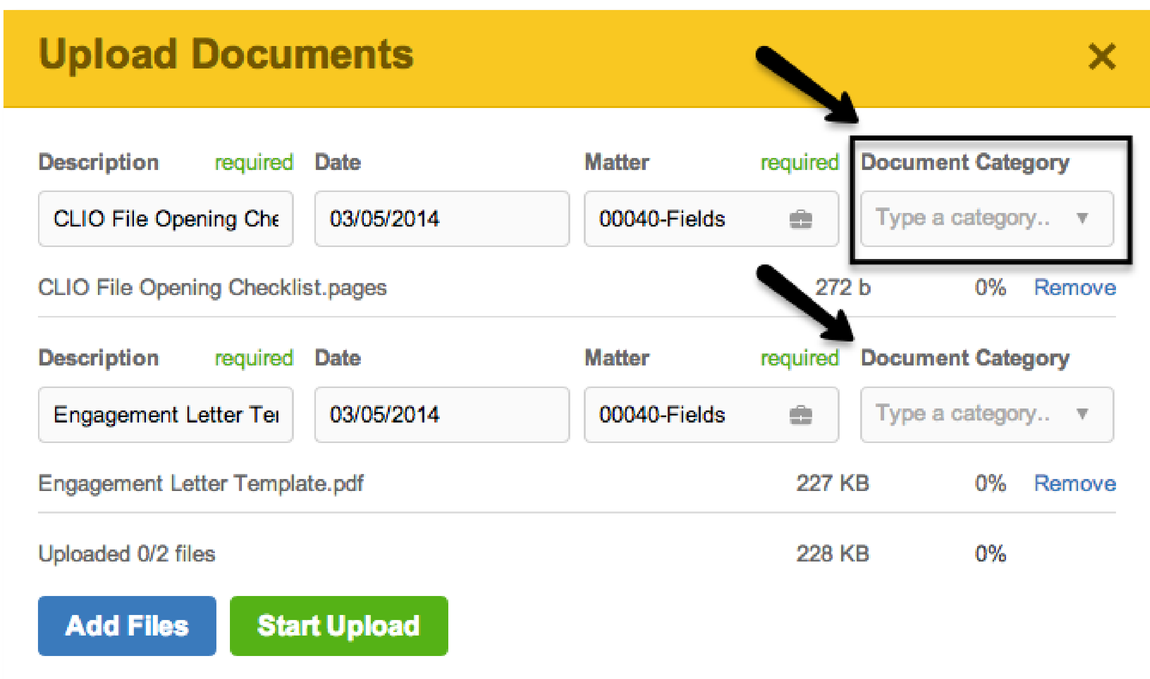
Documents

Uploading Documents

To upload a Document to Clio, go to either the Documents tab or the Documents sub-tab of a Matter and click "Add" – "New Document":



You can either click "Add Files", or drag and drop them into the uploader screen. Please note that there is a 100 MB limit per file. There is no storage limit for your Clio account.

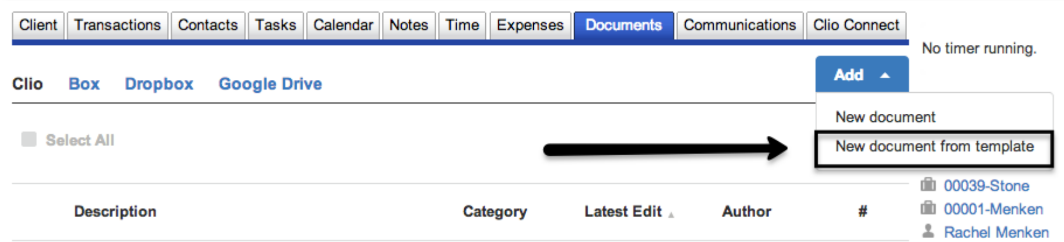


In the uploader, you will need to specify a Description, Date, Matter (already filled out if you are uploading from the matter page) and the Category for the Document. Once you're satisfied, press the "Start Upload" button.

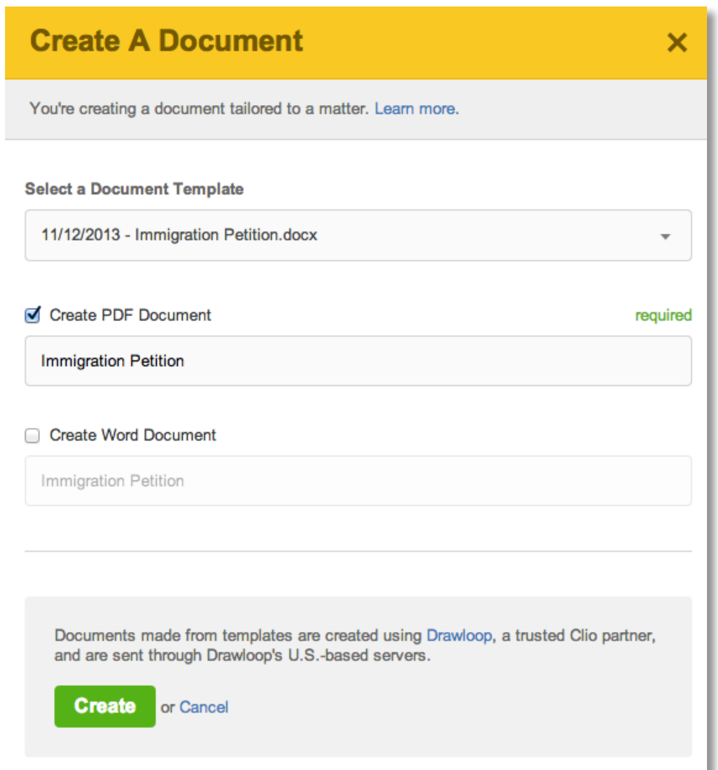
Document Templates & Automation

In order to use the Document Automation feature you must have a template. Click here for instructions on how to make a template.

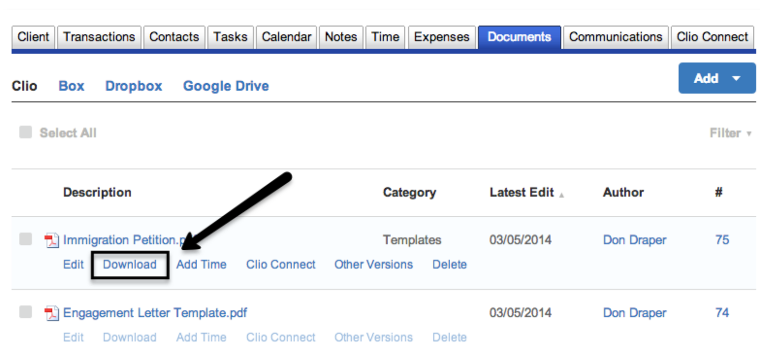
To create a document from a template, go to either the Documents tab or a Matter card/Documents and click on "Add" and select "New Document from Template":



Choose the template you want to use from the list of templates you have uploaded. Also choose the format you want the document created in (PDF, Word) and then click on "Create":



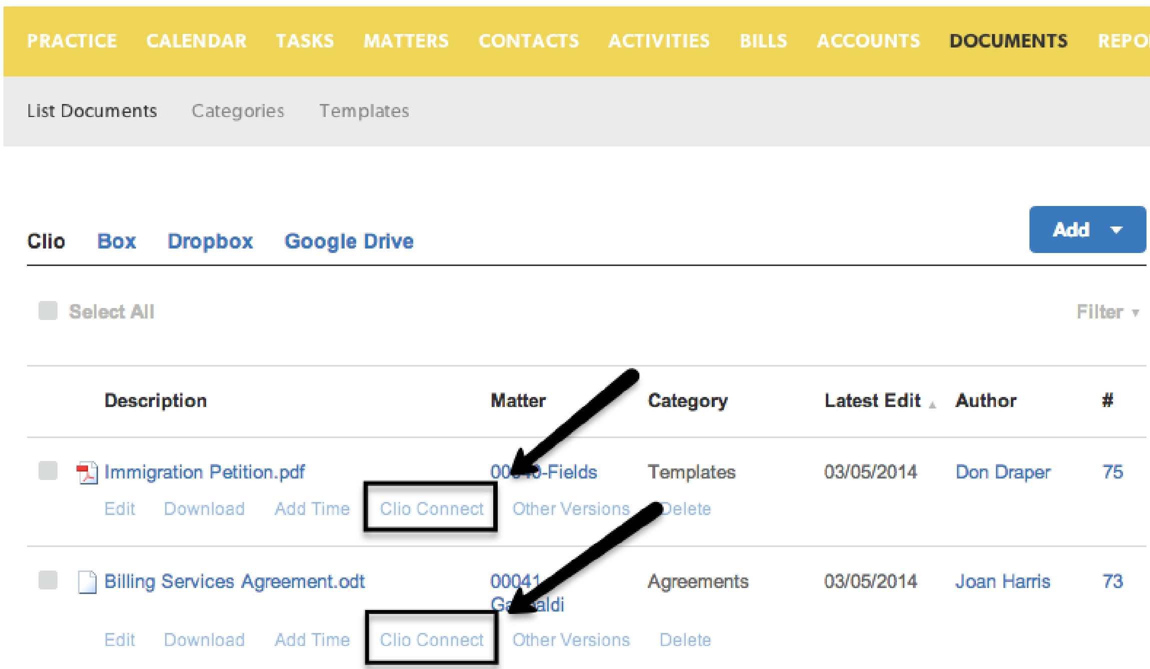
You can now view the document you created by clicking on the Download link in the Document list:



Clio Connect

Clio Connect is a client portal designed to offer you the ability to provide your clients with a secure extranet through which they can access specific documents or secure messages that you've chosen to share with them.

To share a Document with a client via Clio Connect, click on the Clio Connect link under the Document description.



You can also send secure messages to your clients using Clio Connect; for more information on how to do this, please visit the communications section of this document.