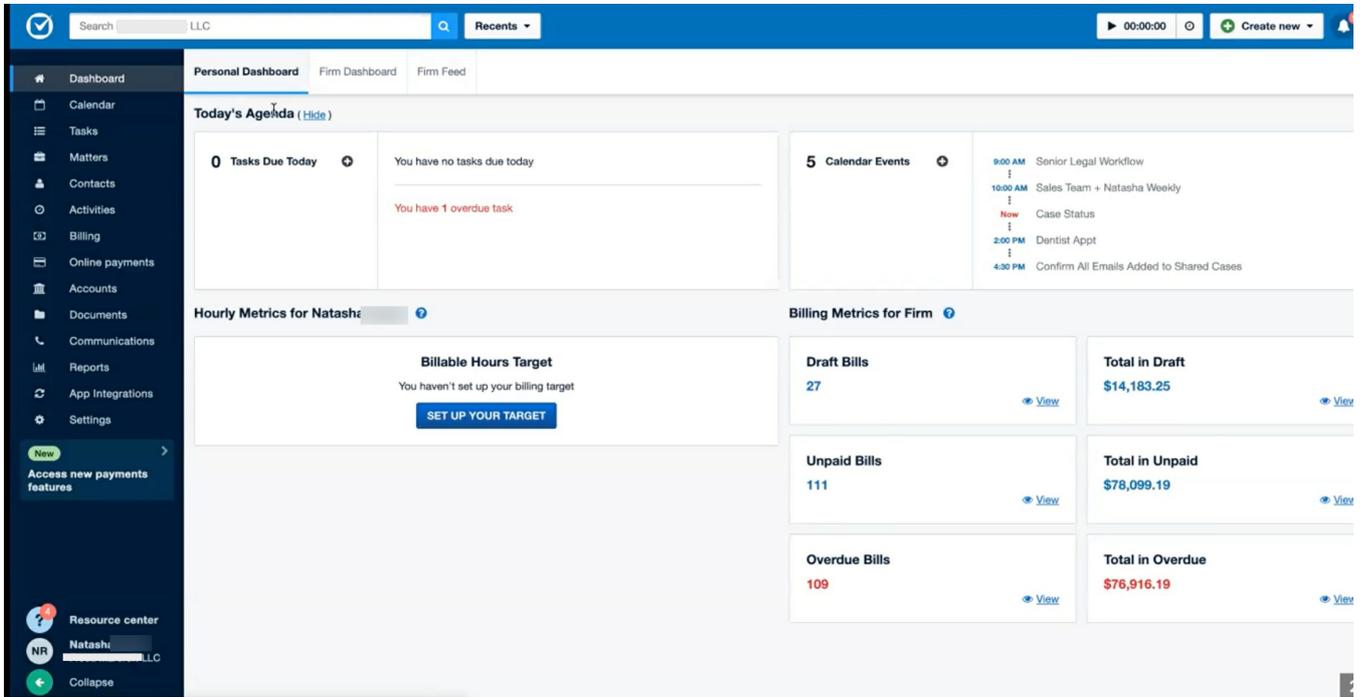


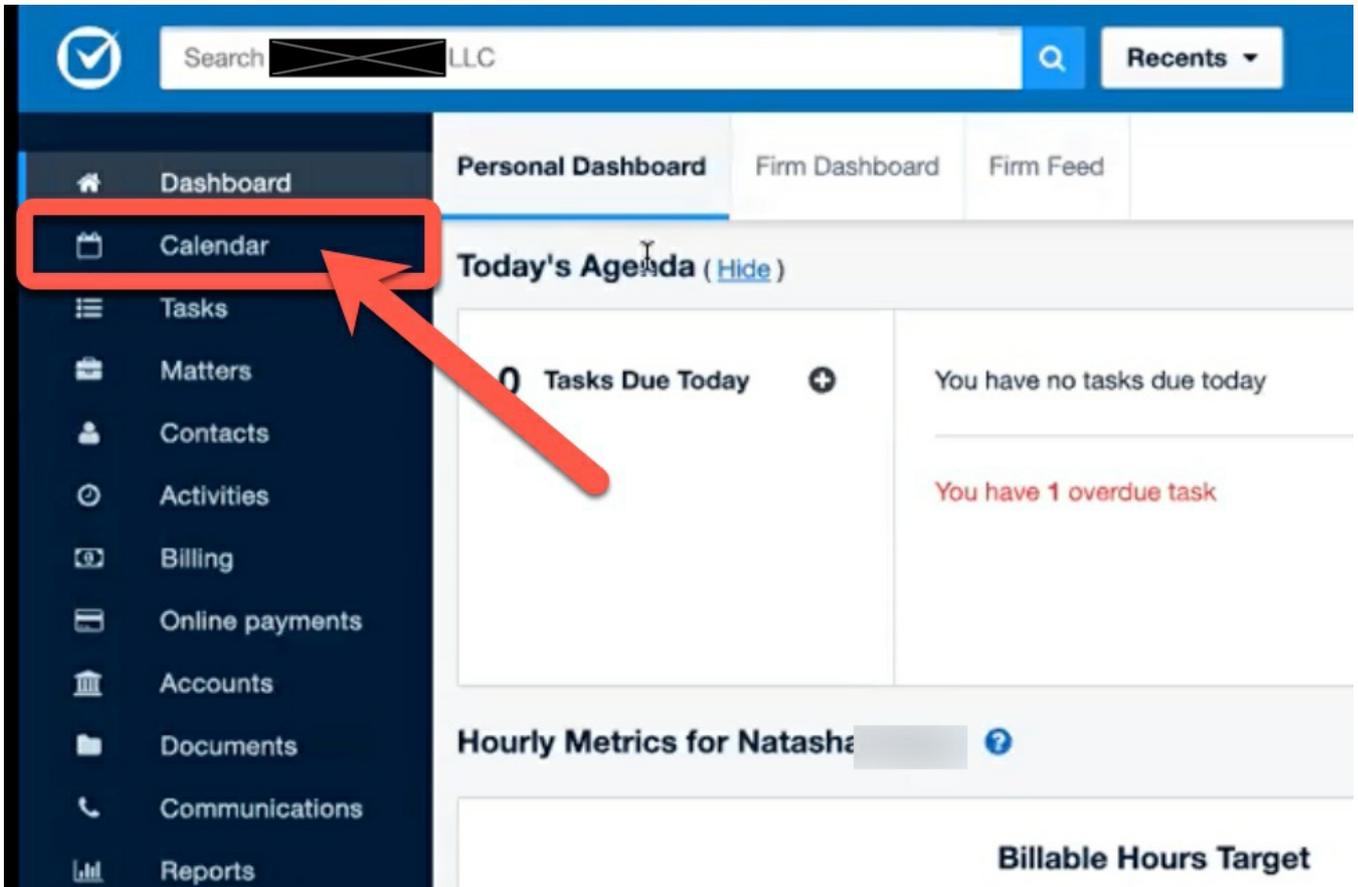
Rescheduling a PNC

Sometimes PNCs will call intake needing to **reschedule** their **Goals and Planning Conference**.

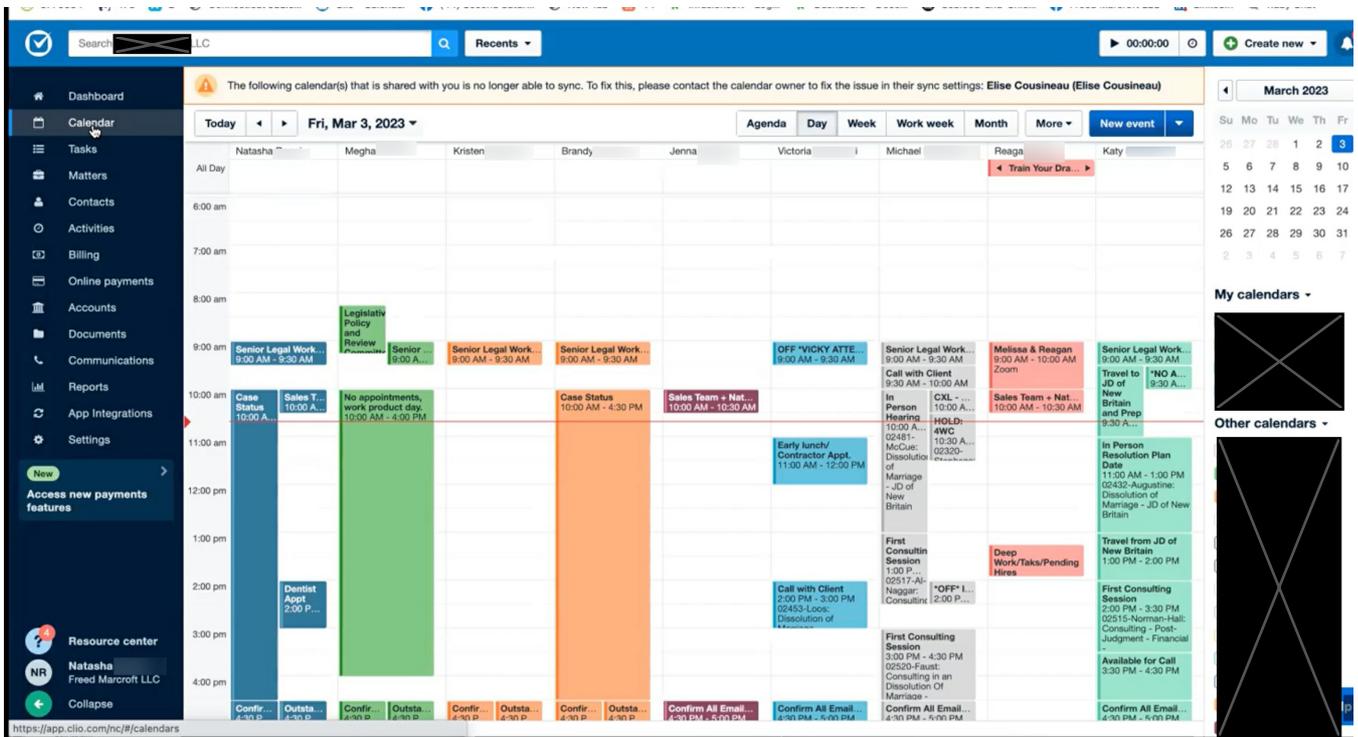
To **reschedule** a PNC, first, navigate to the **CLIO homepage**.



Select **Calendar** from the left-hand toolbar.

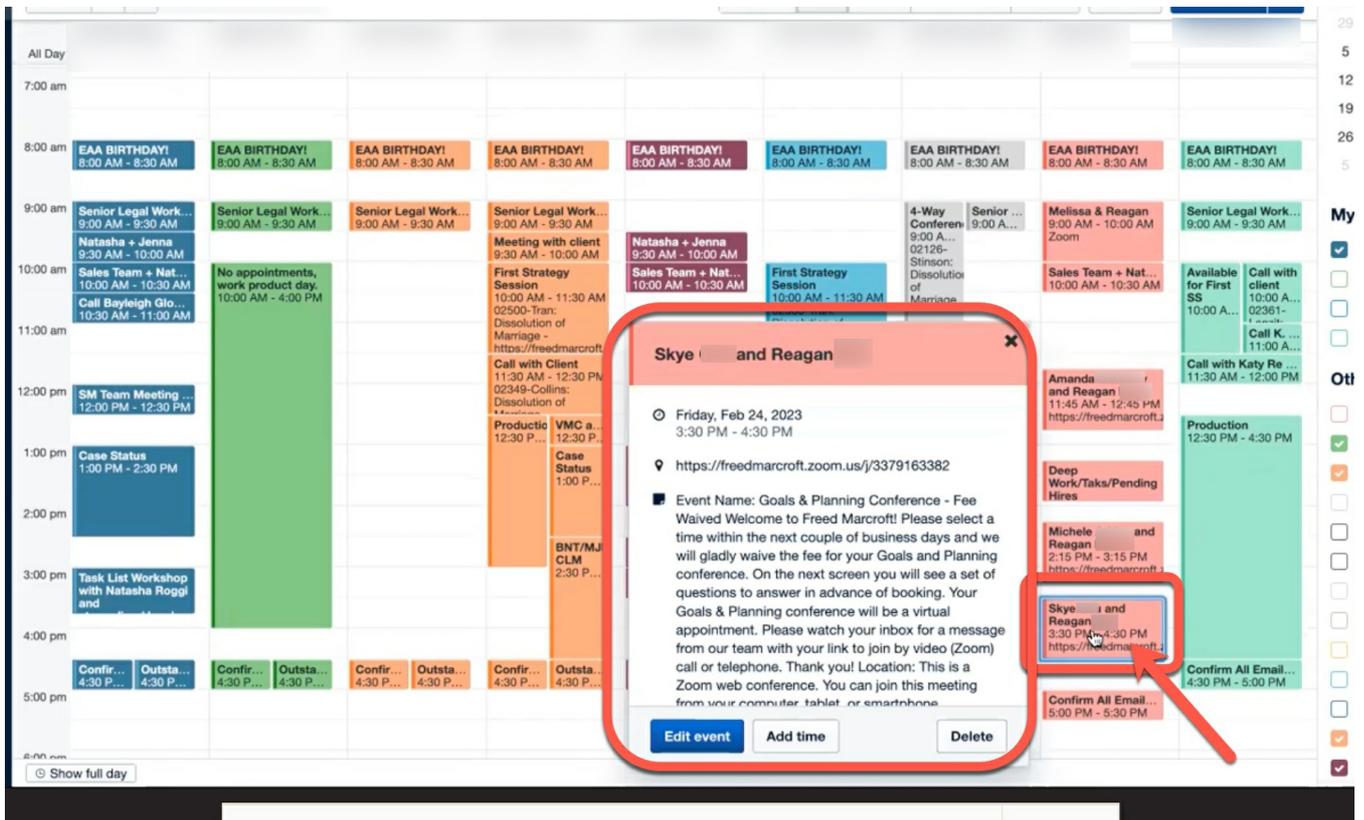


The CLIO calendar page will populate.

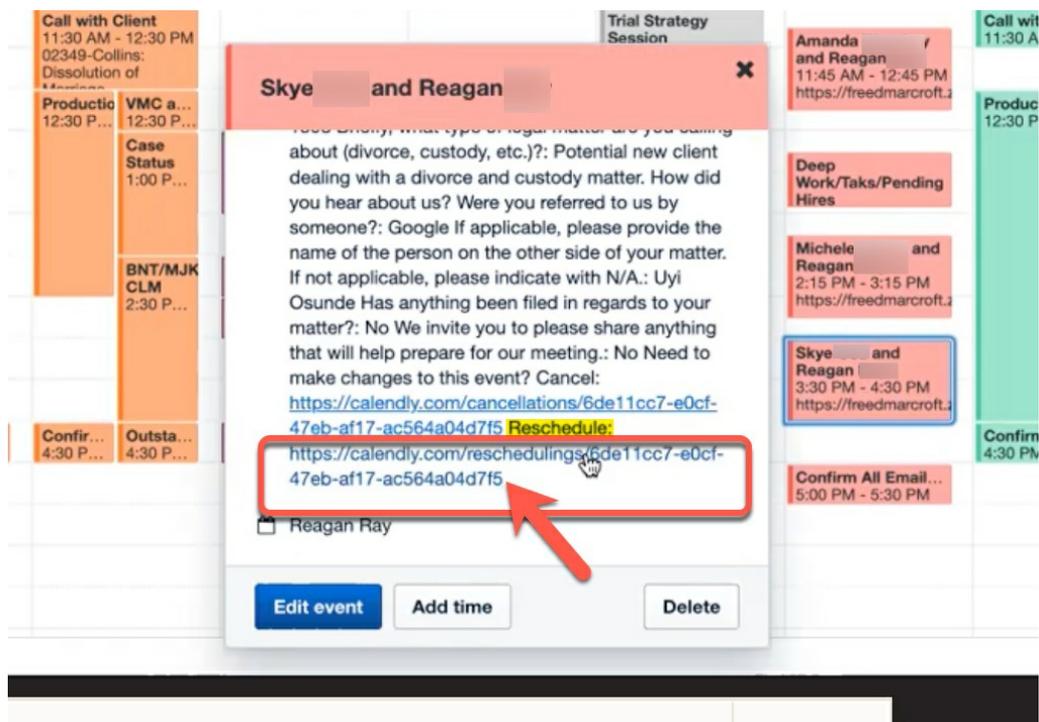


Locate and select the **Goals and Planning Conference** that needs to be **rescheduled**.

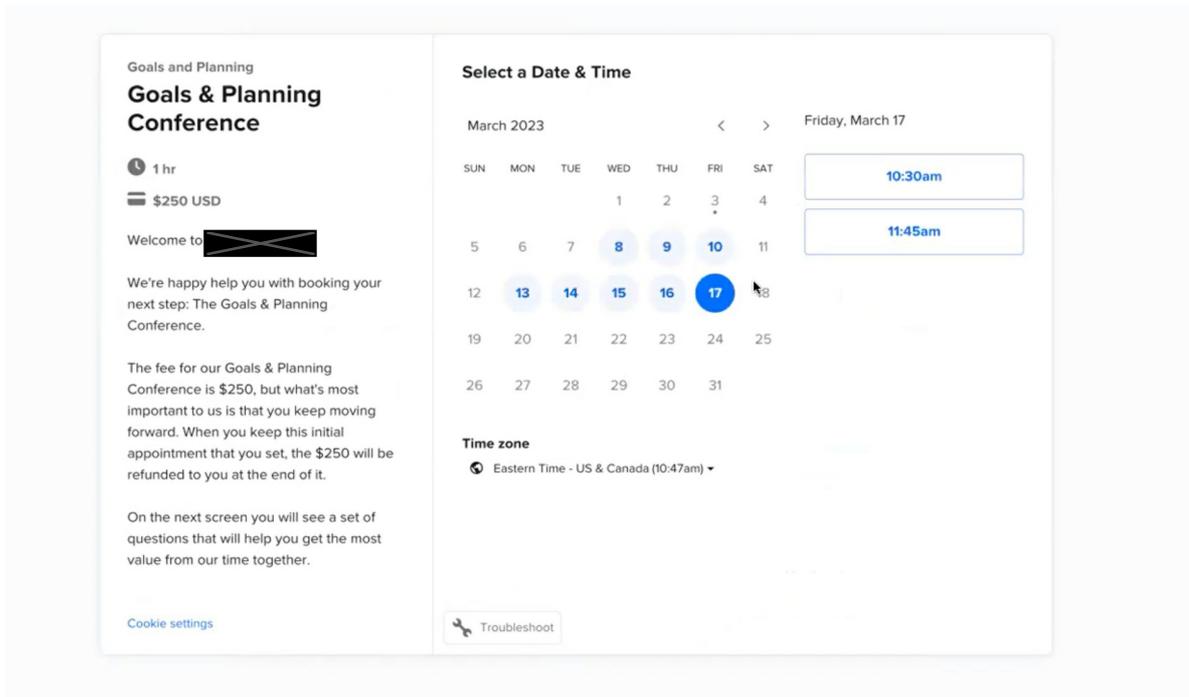
An **event description box** will populate after selection.



Scroll down in the event description box and select the "Reschedule" link.



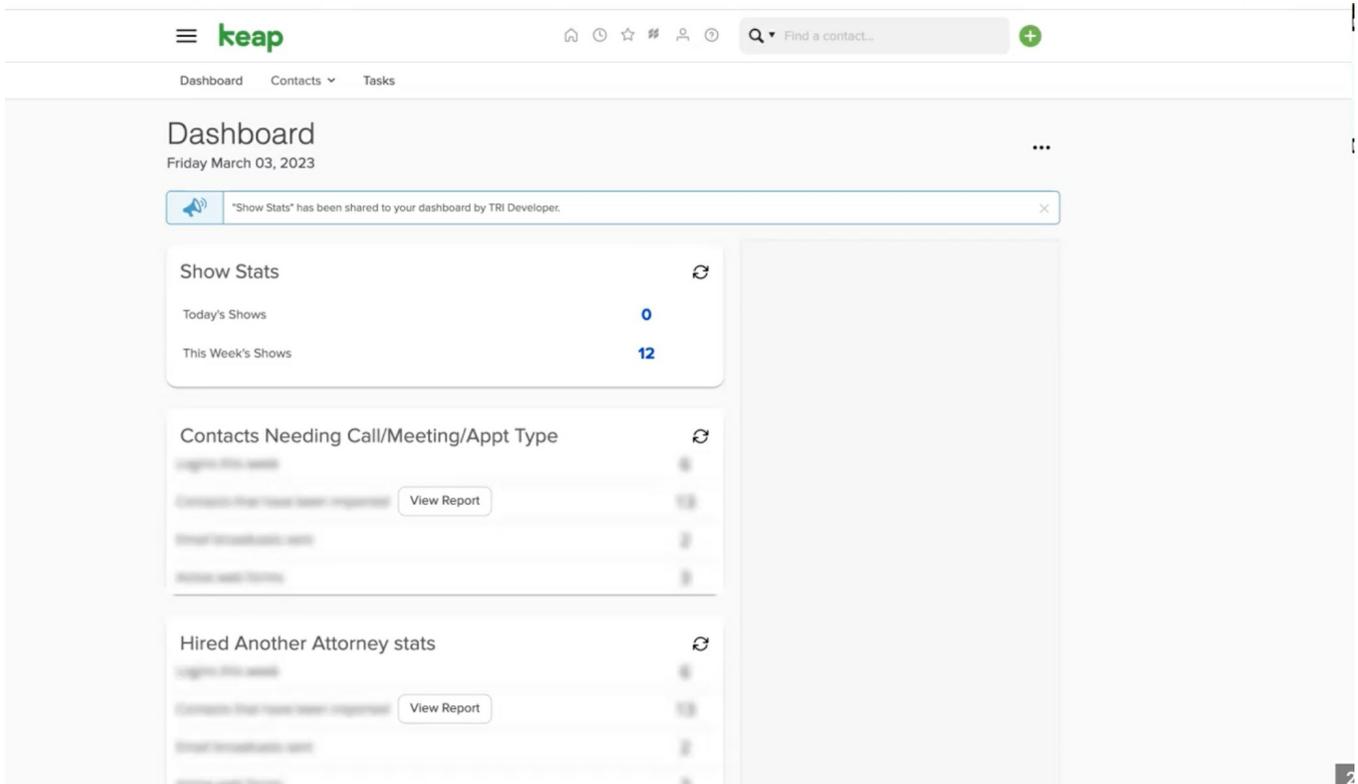
A Calendly scheduling link will populate.



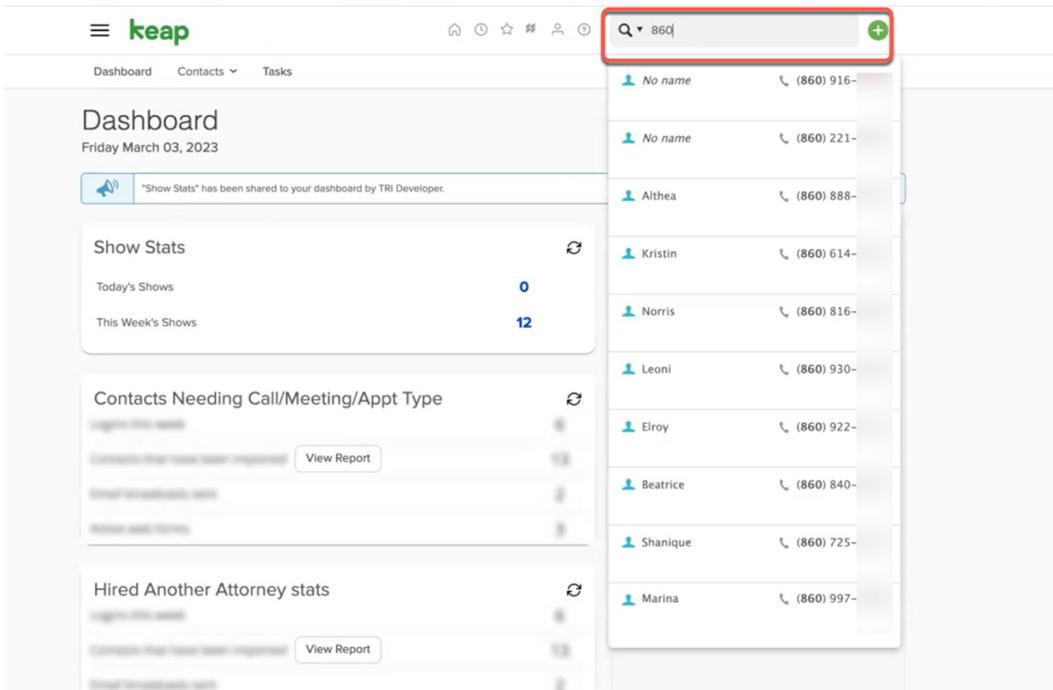
Select the **PNC's desired date** and **time** for the **rescheduled Goals and Planning Conference**.

After the Goals and Planning Conference has been **rescheduled**, **update Rainmaker**.

To do this, first, navigate to the **Rainmaker Homepage**.

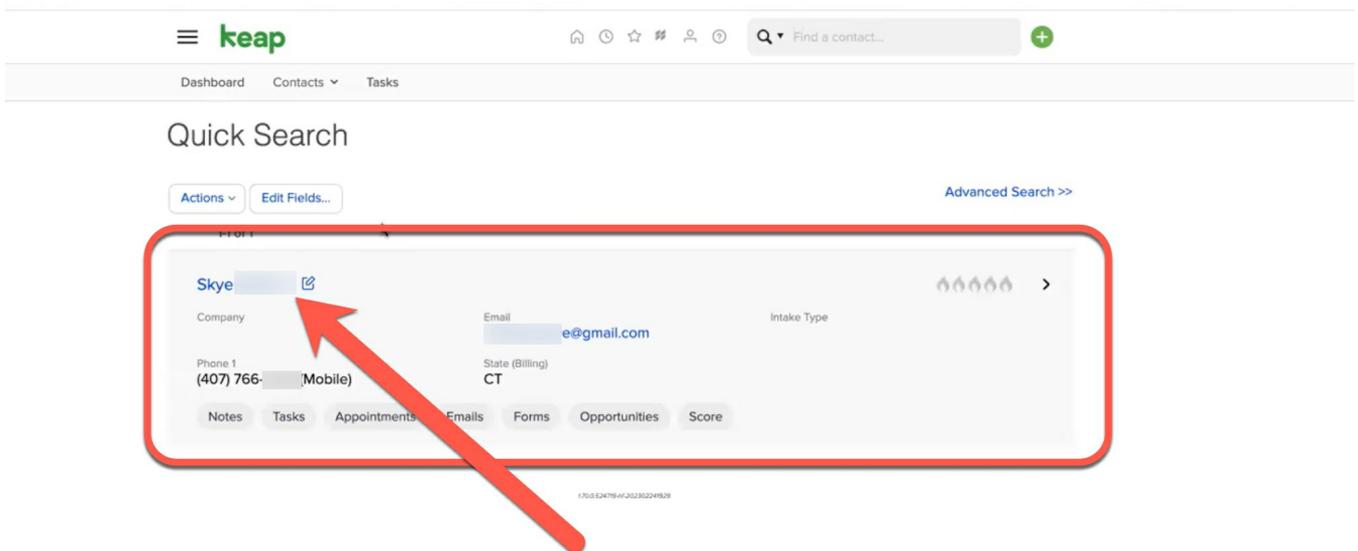


In the **search bar**, input the **PNC's phone number or name**.



Search results will populate.

Select the desired **PNC's profile** from the search results.



The **PNC's profile** will populate.

ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250&searchResult=21250

Dashboard Contacts Tasks

Skype (back to search results)

General Address Additional Info Person Notes Intake Data Appointment Data New Client Questionnaires Do Not Use This Tab Custom Fields Tag Linked Contacts Access Privileges

General Information

First Name: Skype
 Last Name: [Redacted]
 Company: [Redacted]
 Company: Choose a company
 Go Search... Clear
 Job Title: [Redacted]
 Intake Type: Please select an intake type
 Lead Source: [Redacted]
 Owner: Reagan [Redacted]

Score

Lead Score: [5 stars]

Phone / Fax

Phone 1: Mobile (407) 766 [Redacted]
 Phone 2: Work [Redacted]
 Fax 1: Work [Redacted]

Email / Social

Email: [Redacted]@gmail.com
 Status: Unconfirmed Manage Email Status...
 Website: [Redacted]
 Facebook: [Redacted]
 Twitter: [Redacted]
 LinkedIn: [Redacted]
 Instagram: [Redacted]
 Snapchat: [Redacted]
 YouTube: [Redacted]

Billing Address

Street Address 1: 795 [Redacted]
 Street Address 2: [Redacted]
 City: [Redacted]
 State: CT
 Postal Code: [Redacted]
 Country: [Redacted]

Scroll down the PNC's profile to the **"Forms and Submissions"** section.

Notes

[View All](#) [Note Template...](#) [Add Note](#)

This Contact does not have any Notes

Form Submissions [View All](#) [Internal Forms...](#) [Fill Out](#)

Date	Form	Submitted By	Referring URL
2/24/2023	Goals and Planning O...	Reagan	https://ag423.infusionsoft.com/Contact/oldManageContact_legacy.jsp?view=edit&ID=21250
2/23/2023	Intake/Appointment S...	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250
2/23/2023	Goals and Planning O...	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250
2/21/2023	Intake/Appointment S...	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250&searchResult=...
2/16/2023	Intake/Appointment S...	Jenni	https://ag423.infusionsoft.com/app/nav/link?navSystem=nav.mynav&navModule=contact&navLin...

Recent Email History [Sync Email Account](#) [Send Email](#) [View Entire History](#)

● Received ○ Sent ● Campaign ● Notification ● Bounced

Email	Status	Date	Subject	EmailTo	EmailFrom	Template
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Select **"Intake/Appointment Setting Form"** from the drop-down menu at the top of this section.

Notes

[View All](#) [Note Template...](#) [Add Note](#)

This Contact does not have any Notes

Form Submissions

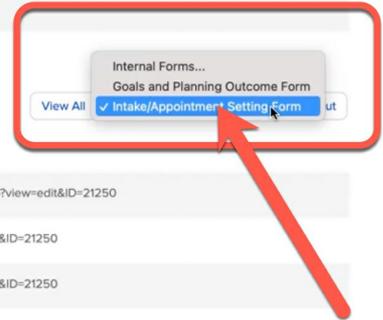
Date	Form	Submitted By	Referring URL
2/24/2023	Goals and Planning O...	Reagar	https://ag423.infusionsoft.com/Contact/oldManageContact_legacy.jsp?view=edit&ID=21250
2/23/2023	Intake/Appointment S...	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250
2/23/2023	Goals and Planning O...	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250
2/21/2023	Intake/Appointment S...	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250&searchResult=...
2/16/2023	Intake/Appointment S...	Jenna	https://ag423.infusionsoft.com/app/nav/link?navSystem=nav.mynav&navModule=contact&navLin...

Recent Email History

Received Sent Campaign Notification Bounced

[Sync Email Account](#) [Send Email](#) [View Entire History](#)

Email	Status	Date	Subject	EmailTo	EmailFrom	Template
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Then select "Fill Out."

Form Submissions

Date	Form	Submitted By	Referring URL
2/24/2023	Goals and Planning O...	Reagar	https://ag423.infusionsoft.com/Contact/oldManageContact_legacy.jsp?view=edit&ID=21250
2/23/2023	Intake/Appointment S...	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250
2/23/2023	Goals and Planning O...	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250
2/21/2023	Intake/Appointment S...	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250&searchResult=...
2/16/2023	Intake/Appointment S...	Jenna	https://ag423.infusionsoft.com/app/nav/link?navSystem=nav.mynav&navModule=contact&navLin...

Recent Email History

[Sync Email Account](#) [Send Email](#) [View Entire History](#)



The "Intake/Appointment Setting Form" will appear with the general profile information already populated in the appropriate fields.

Complete Form

Intake/Appointment Setting Form

PNC Information

Initial Call Date * 02-15-2023

First Name * Skye

Last Name

Email r @gmail.com

The email will be addressed 'Dear _____' and will appear exactly as typed into the Email Salutation field (Mr. Smith will appear as Dear Mr. Smith)

Email Salutation * Skye

Phone 1 Type Mobile

Phone 1 (407) 766

Phone 2 Type Work

Phone 2 Phone 2

HTM Call? Yes No

If you have collected a Mobile Number above, please duplicate it in the field below. Select Yes from the dropdown below once you have confirmed permission for appointment notifications and other reminders.

Mobile Number (407) 766

Permission to text? * No

Scroll down to the **"Appoint Information"** section and edit the following information to **reflect** the **rescheduled Goals and Planning Conference**:

- **Appointment Date**
- **Appointment Time**
- **Appointment Location**- This selection should reflect who the appointment is scheduled with.
- **Consult Set With**

Appointment Information

If setting an appointment or case evaluation, then please be sure and check something from all fields below as appropriate. If no location is selected then no emails will be sent if an appointment is set.

Appointment Date	02-24-2023
Appointment Time	10:30 AM
Appointment Location *	Zoom-Reagan
Consult Set With	Reagan
Retainer	2000.0

Call/Meeting/Appt Scheduled
 Pending Appointment-Ruby Scheduled
 Reading Contact

After all the **information** is **correctly revised**, scroll down and **select "Save"** at the bottom of the "Intake/Appointment Setting Form."

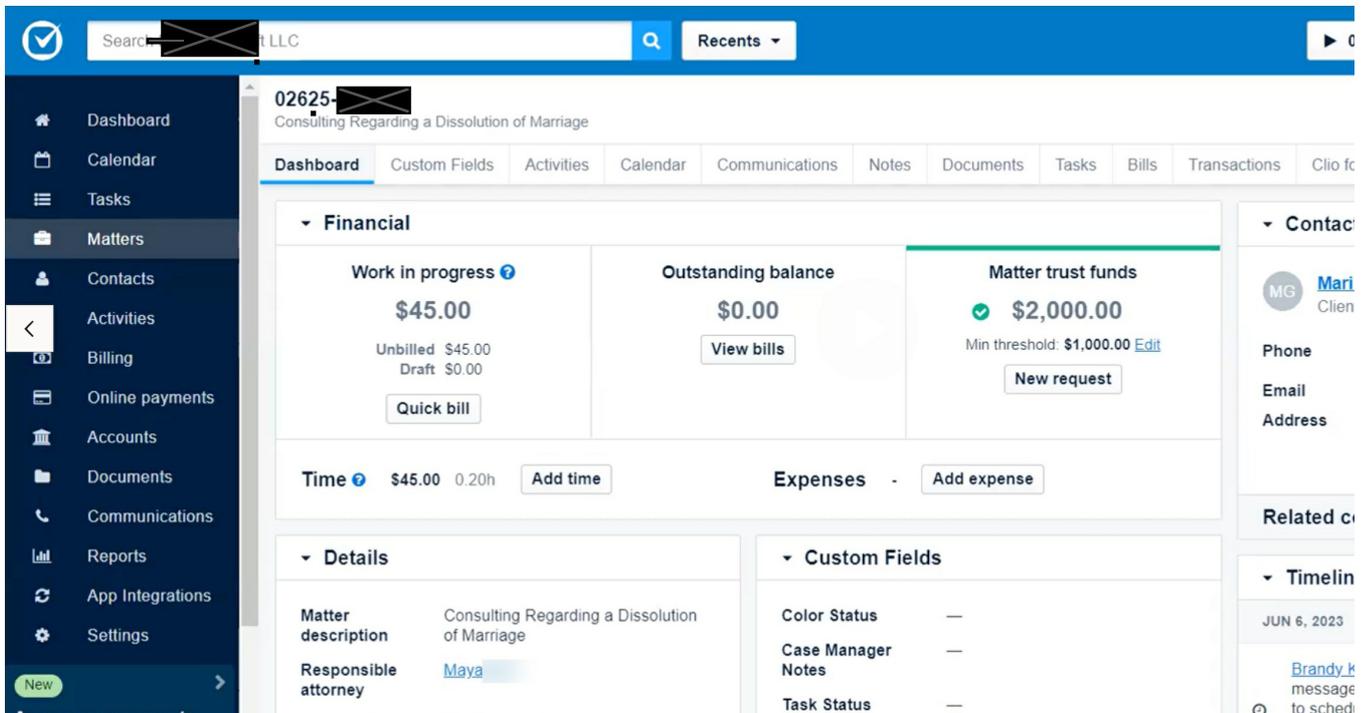
The screenshot shows a web form with three dropdown menus. The first is labeled "Intake Task Assignment *" and has "Reaga" selected. The second is labeled "Intake Completed By *" and has "Jenna" selected. The third is labeled "Intake Completed By if Other" and is currently empty. At the bottom left of the form, a blue "Save" button is highlighted with a red square and a red arrow pointing to it. The word "Bou" is partially visible on the left side of the form.

The **new "Intake/Appointment Setting Form"** will **appear** in **Rainmaker** and **trigger preliminary actions** for the upcoming appointment.

Synching CLIO with Case Status

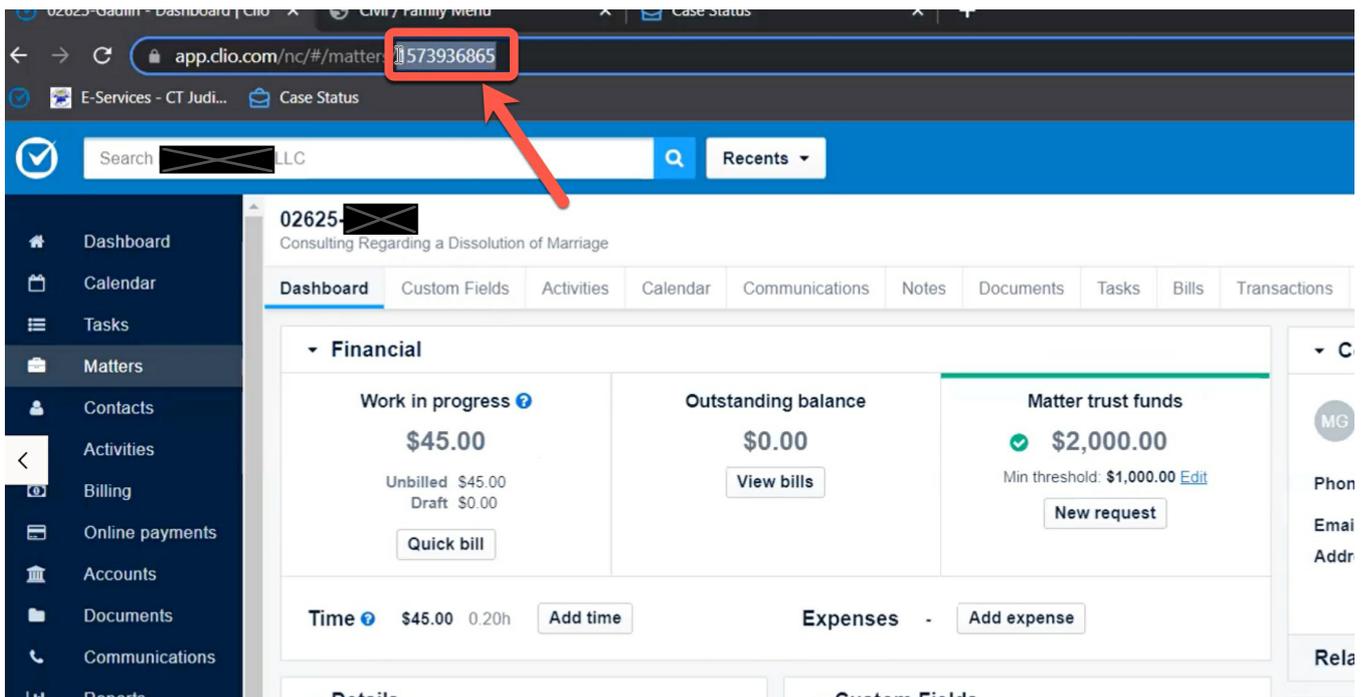
Case Status and **CLIO** need to be **synched** for **clients** and **personnel** to be able to access and **communicate** about the case in Case Status.

To do this, navigate to the desired **client's profile** in **CLIO**.

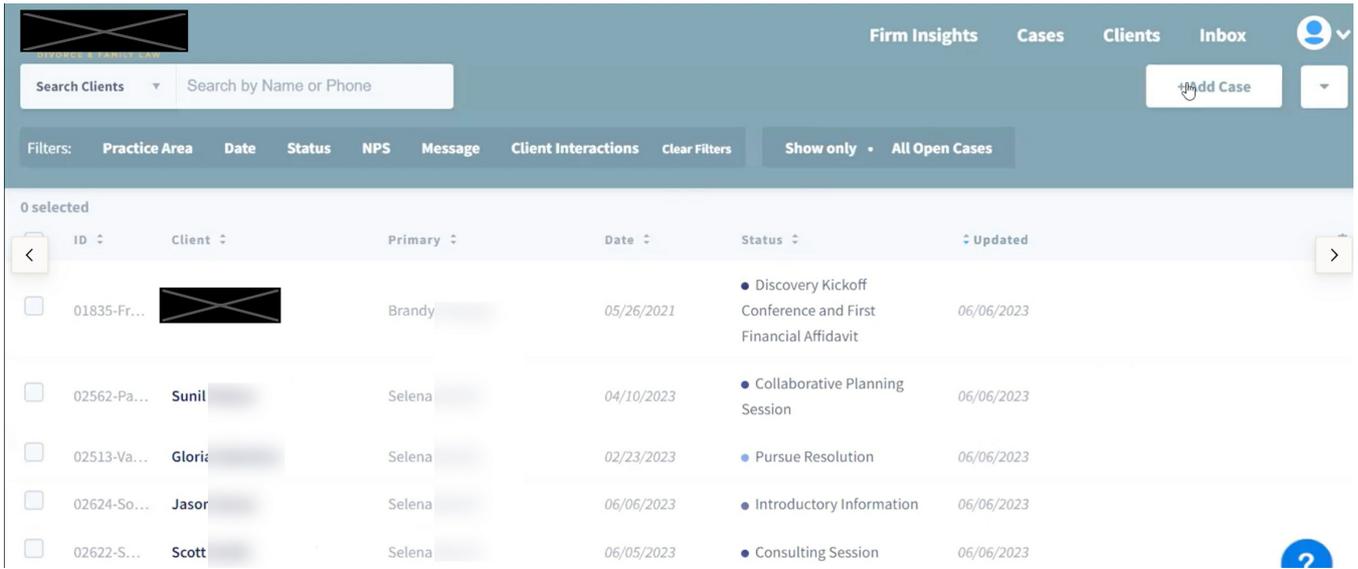


Locate and **copy** the **CLIO reference identification number**.

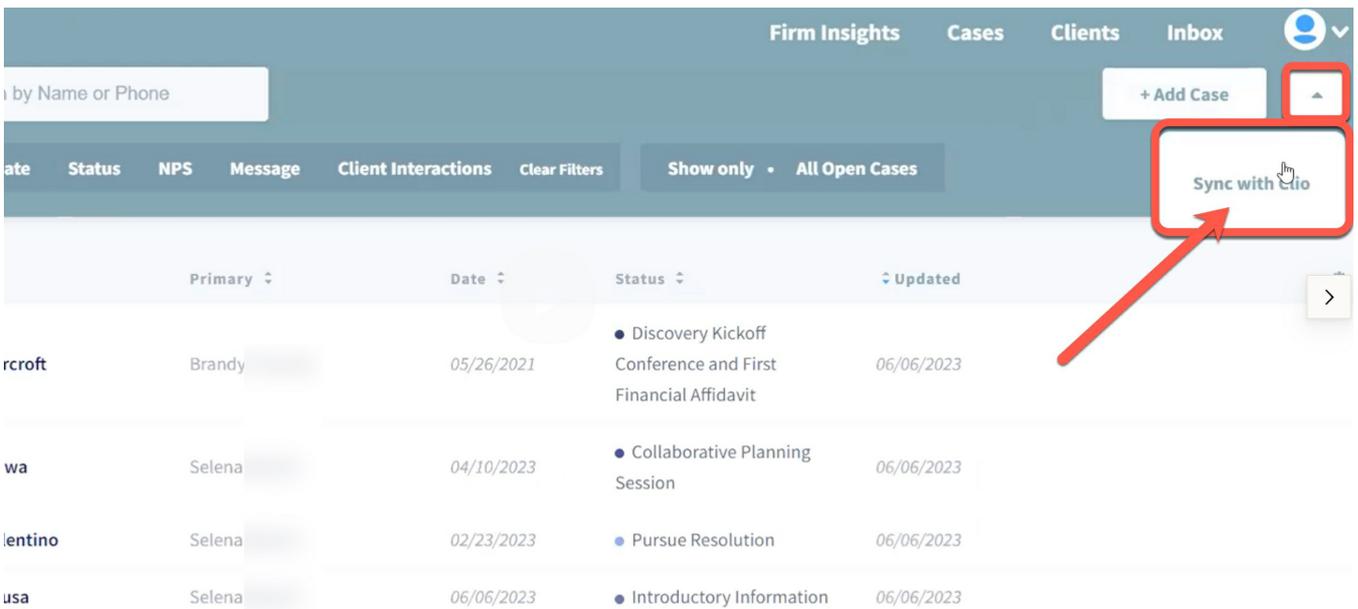
This will be at the end of the **CLIO page's URL**.



Now, navigate to the **Case Status Home page**.

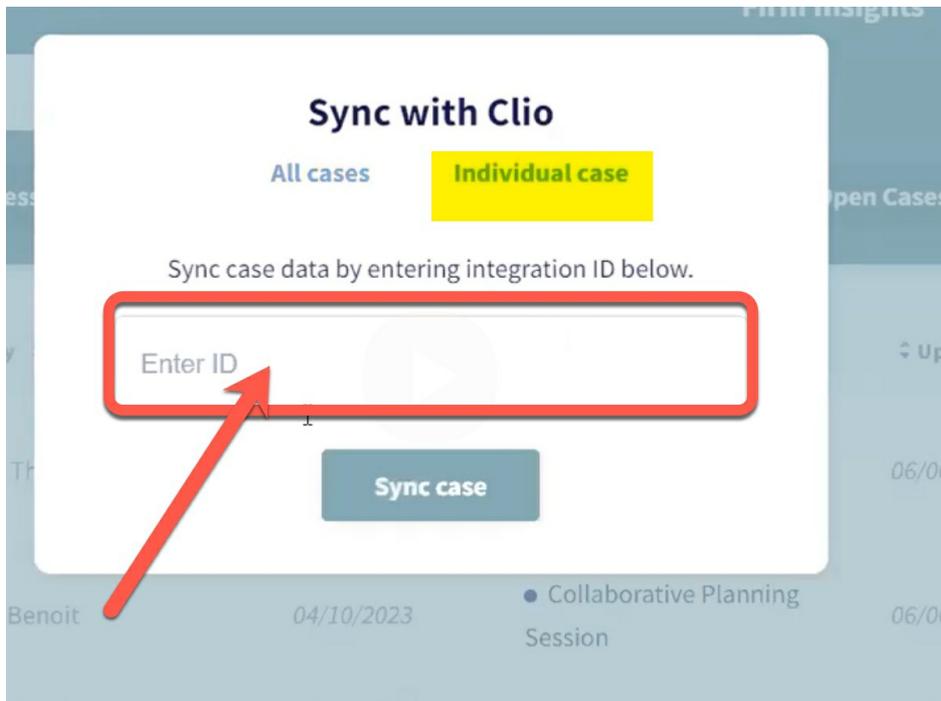


Select the **down arrow icon** from the top right corner, then select **"Sync with CLIO."**

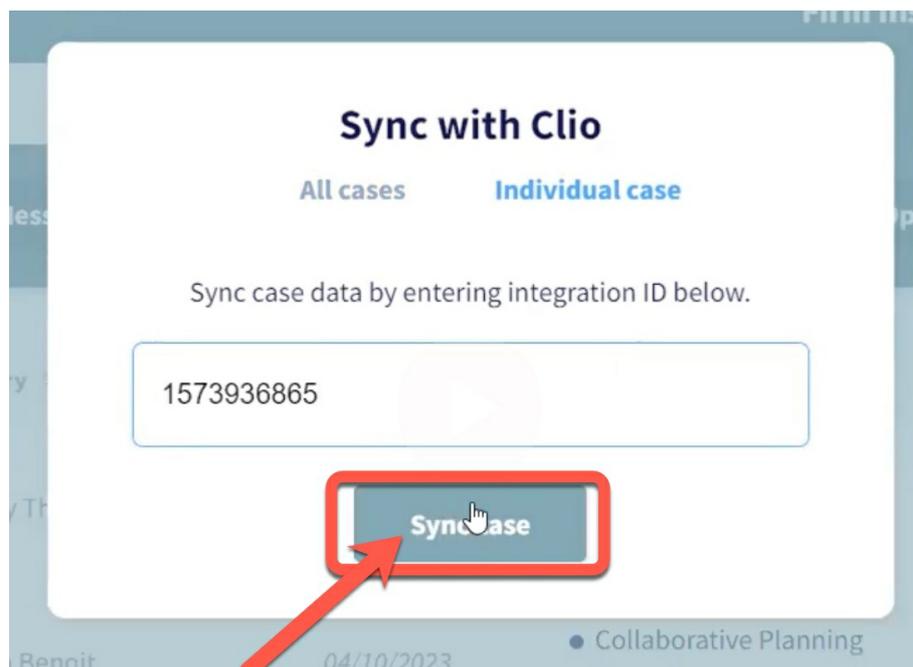


A **"Sync with CLIO"** box will populate.

Select the **"Individual Case"** tab and **paste** the **copied CLIO reference identification number** in the **"Enter ID"** field.



Then select "Sync Case."



The **CLIO** file will **synch** with **Case Status** and appear in the case list on the homepage, **highlighted** in **yellow** to indicate that it is a new entry.

Firm Insights Cases Clients Inbox						
Search Clients Search by Name or Phone + Add Case						
Filters: Practice Area Date Status NPS Message Client Interactions Client Filters Show only All Open Cases						
0 selected						
ID	Client	Primary	Date	Status	Updated	
02625-Ga...	Mari	Maya	06/06/2023	Introductory Information	06/06/2023	
02491-Th...	Heather	Selen	02/02/2023	Divorce & Carry Out the Judgment	06/06/2023	
02607-Lo...	Lopez Second Parent Adop...	Selen	05/18/2023	Gather & Submit Documents	06/06/2023	
02486-M...	Ashley	Selen	01/26/2023	Initial Discovery	06/06/2023	
02612-Pr...	Krysta	Marga	05/23/2023	Decide How to Move Forward	06/06/2023	

Double-click the case to **open the client/case page.**

Case Info Share Status Internal Messaging Appointments Close Case Place On Hold Sync

Case ID: 02625- Client: Mari

Not Activated

Engage with your client
Cases get activated once you send your first message to the client. Start by sending them a message introducing them to Case Status

Send welcome message

Click to add group name + Add Clients

1 Client Last Interaction

Current Status Last updated 06/06/2023

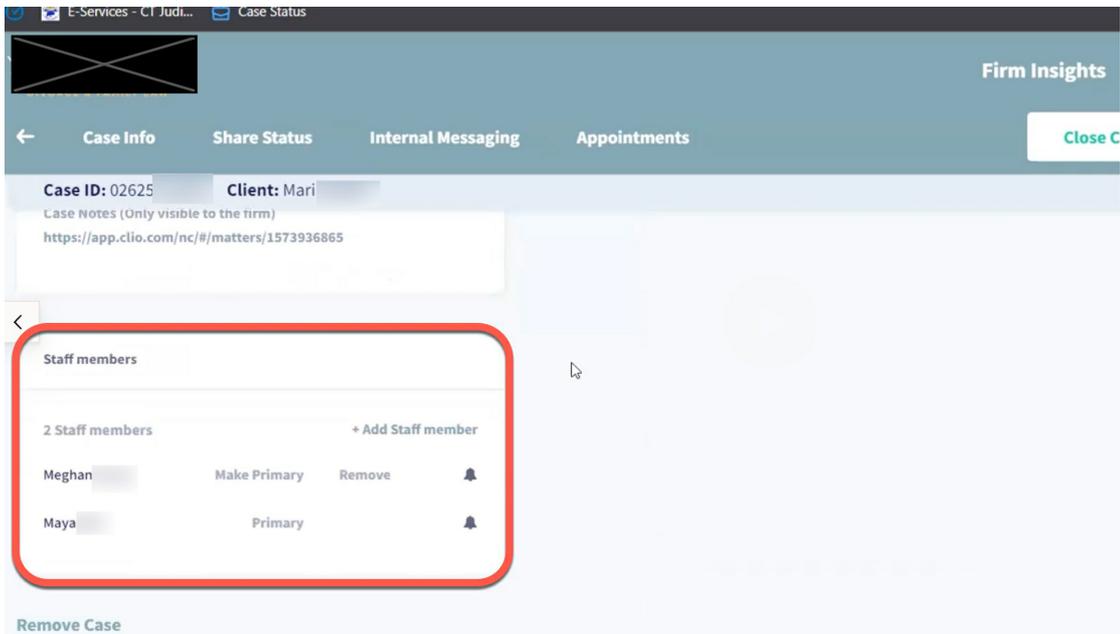
1 2 3

Introductory Information

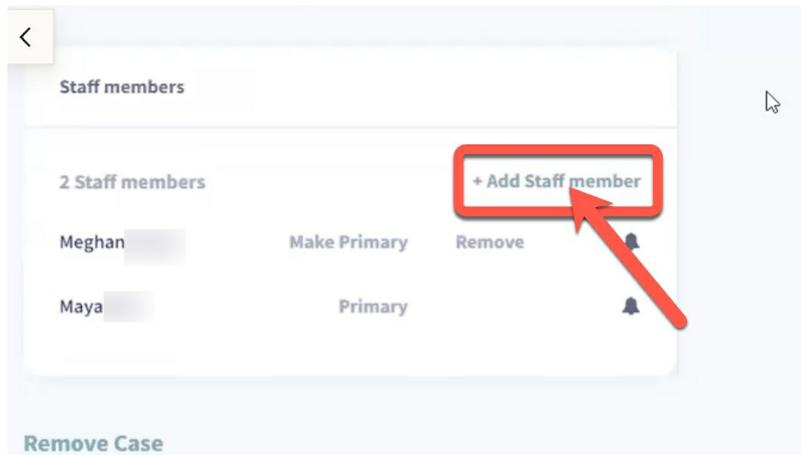
Update Status

Messages Documents Automation Checklist

Scroll down to the **"Staff Members" section** of the page to review and ensure that all the **appropriate personnel** are added to the profile.



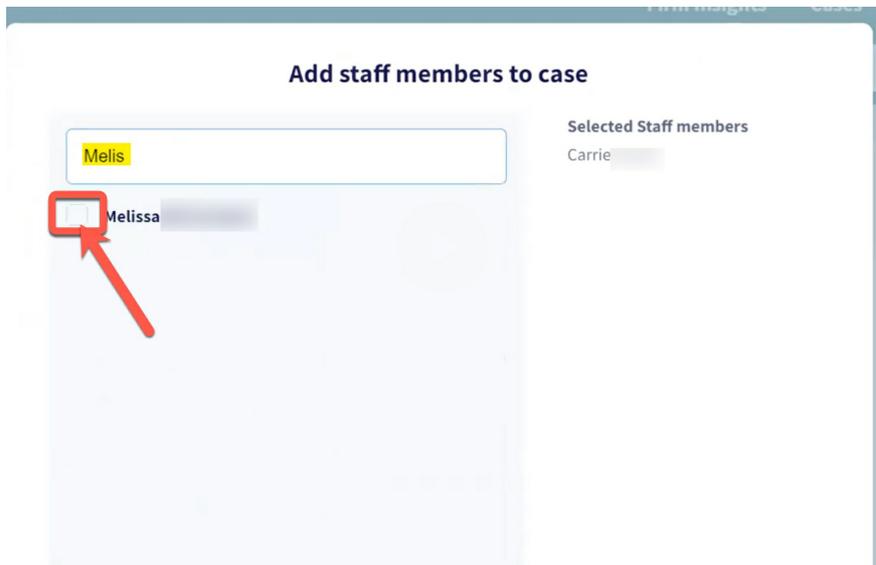
Select **"Add Staff Member"** to make any needed **personnel additions** to the profile.



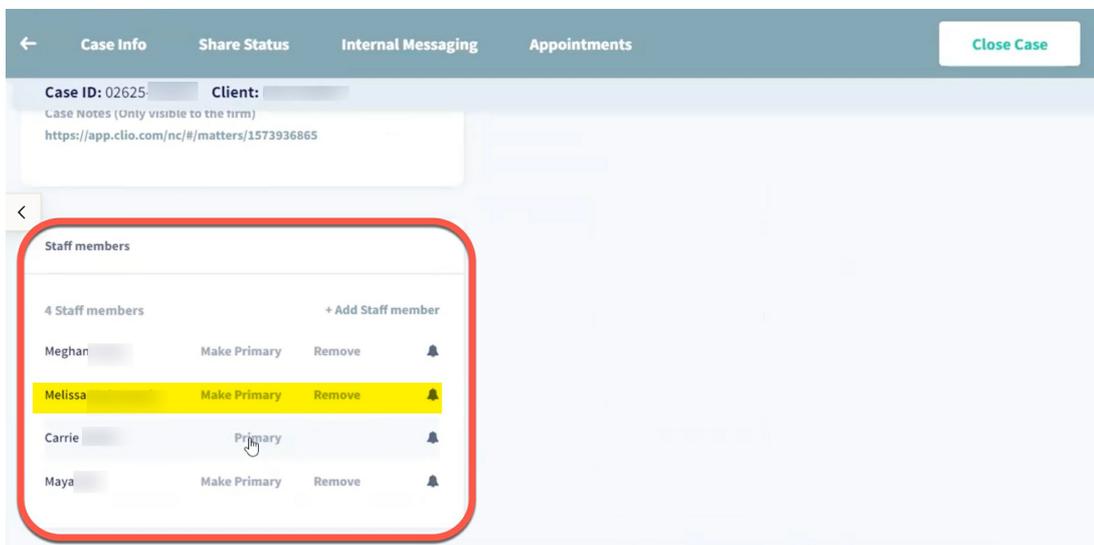
The **"Add Staff Members to Case"** box will populate.

Search and **select** all needed personnel additions.

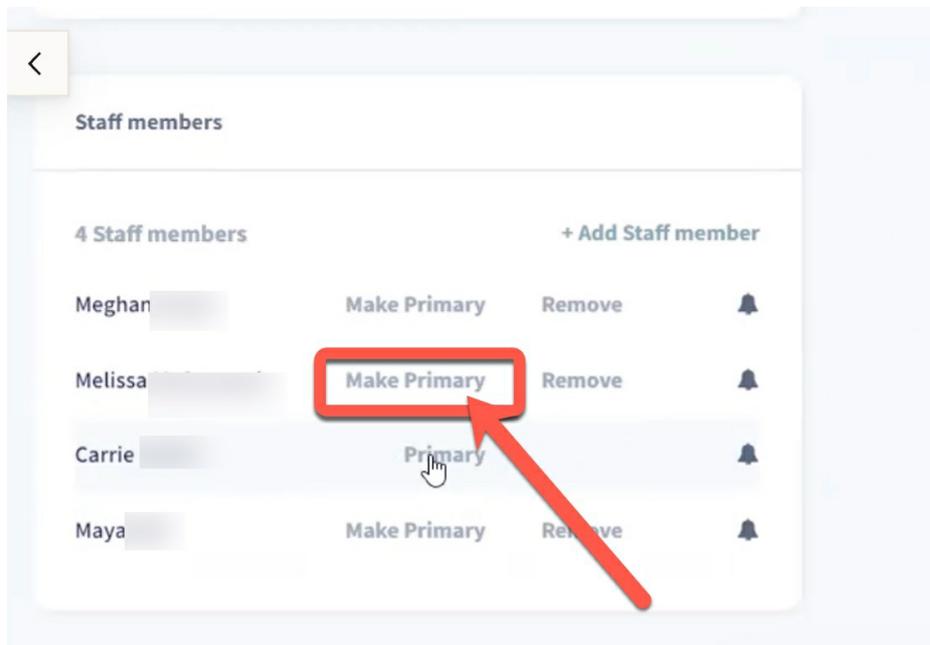
Important Note: If unsure what personnel is responsible for the case, refer to the CLIO profile.



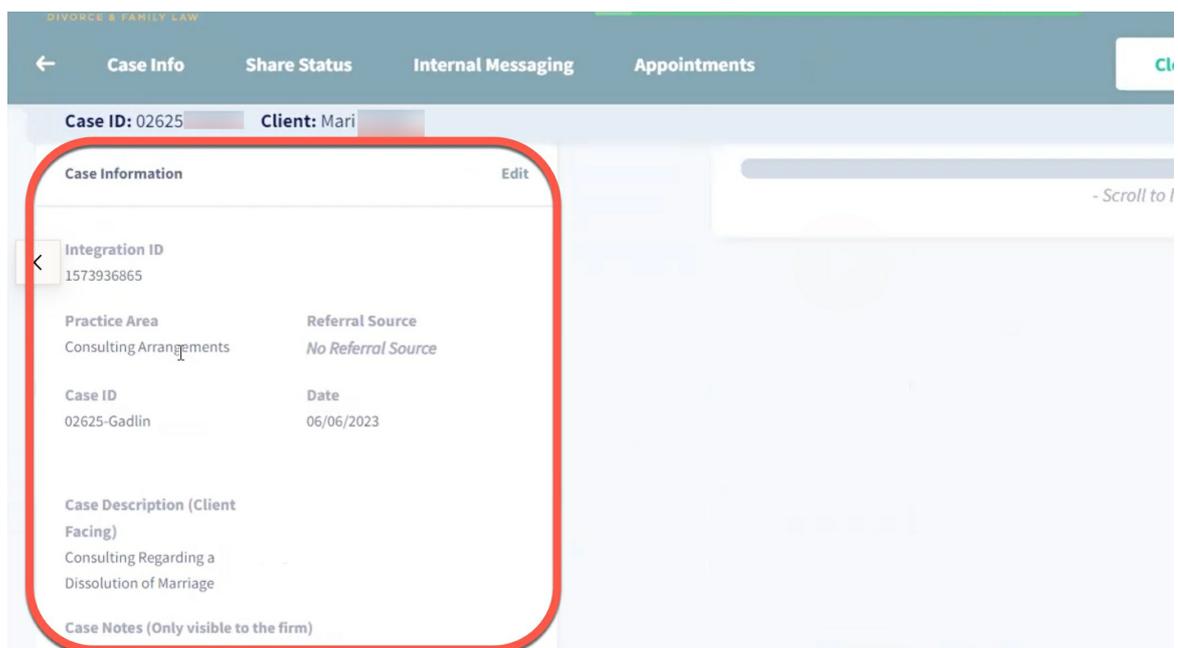
The added personnel will now appear in the **"Staff Members" section**.



Set the **paralegal** as the **primary** on the profile by selecting **"Make Primary"** next to their name.



Next, **review** the **"Case Information"** section for **accuracy, editing** any information **as needed**.



Now the **CLIO profile** is **synced** with **Case Status!**

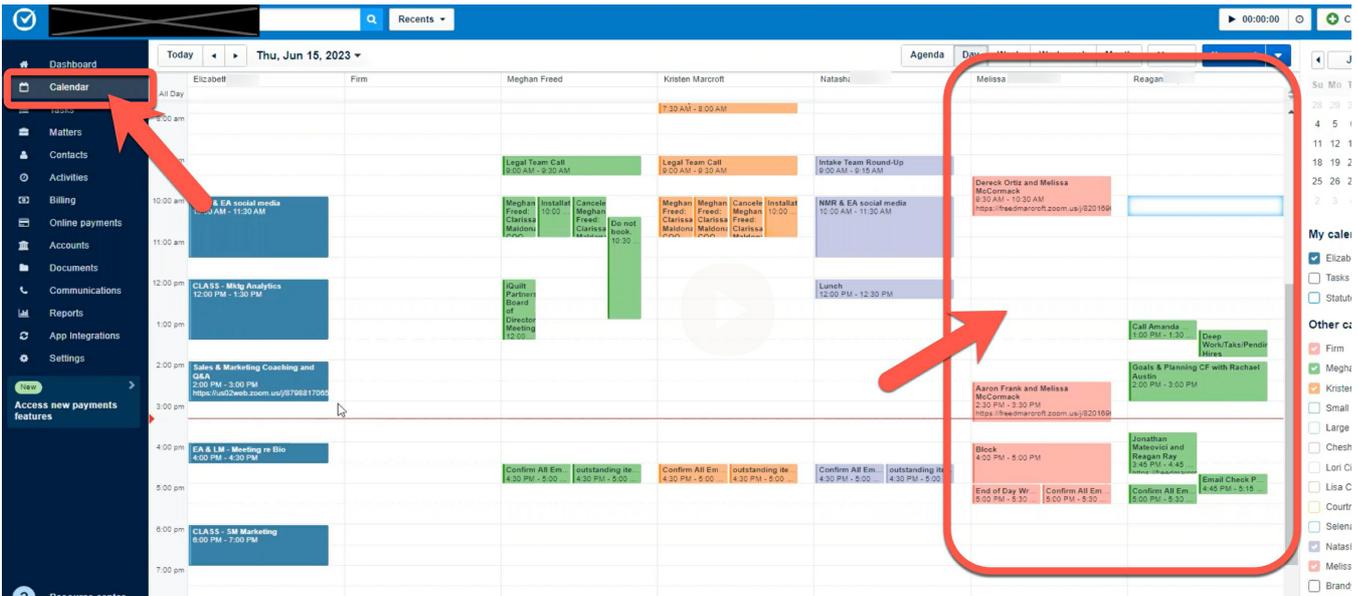
Manually Scheduling a G&P in Clio

Sometimes **PNCs** will **contact us needing to schedule a Goals and Planning session** but **do not have the ability to schedule through Calendly**.

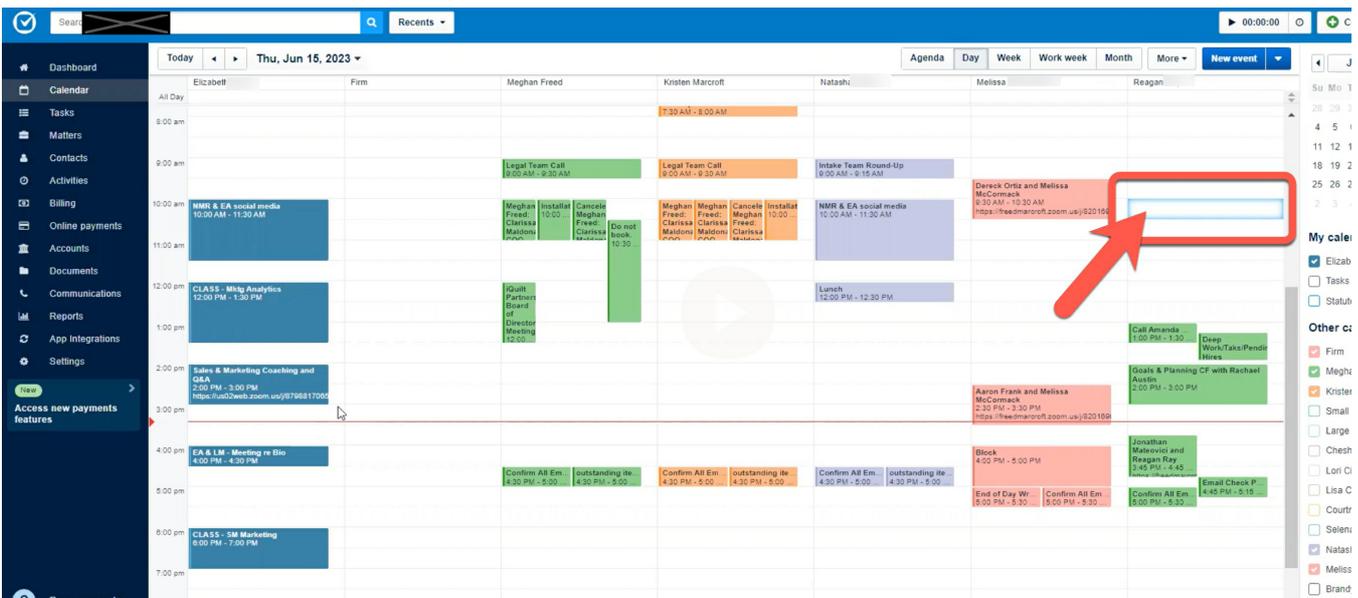
In many of these cases, the **client will need immediate help**.

In these instances, we need to **manually schedule the Goals and Planning session in CLIO**.

First, navigate to the **CLIO "Calendar" tab** and **locate the Sales Representatives' Calendars**.



Then, **double-click** on the **desired available time slot**.



The **"Event Details" box** will populate.

New event

Event details

Title Required

Start time Required End time Required
 06/15/2023 11:00 AM 06/15/2023 11:30 AM

All Day Repeat

Location

Video Conferencing
 Make this a Zoom meeting

Matter

Reminders
 Add new reminder

Contacts who are notified by text will receive a text reminder 1 day(s) before this event [Change setting](#)

Save to this calendar Required
 Reagan Ray

Add this event to the Firm calendar as well as the selected calendar

Event type
 Create event types

Description

Invite attendees

Find firm users or contacts to invite

Suggested attendees
 No suggestions at this time.

For the event "Title" field enter the name of the PNC and the name of the Sales Representative they will be meeting with.

Event details

Title Required
 John Smith and Reagan

06/15/2023 11:00 AM 06/15/2023 11:30 AM

All Day Repeat

Location

Invite attendees

Find firm users or contacts to invite

Suggested attendees
 No suggestions at this time.

Next, edit the meeting time selections to reflect a 1-hour meeting.

Event details

Title Required
 John Smith and Reagan

Start time Required End time Required
 06/15/2023 11:00 AM 06/15/2023 12:00 PM

All Day Repeat

Location

Invite attendees

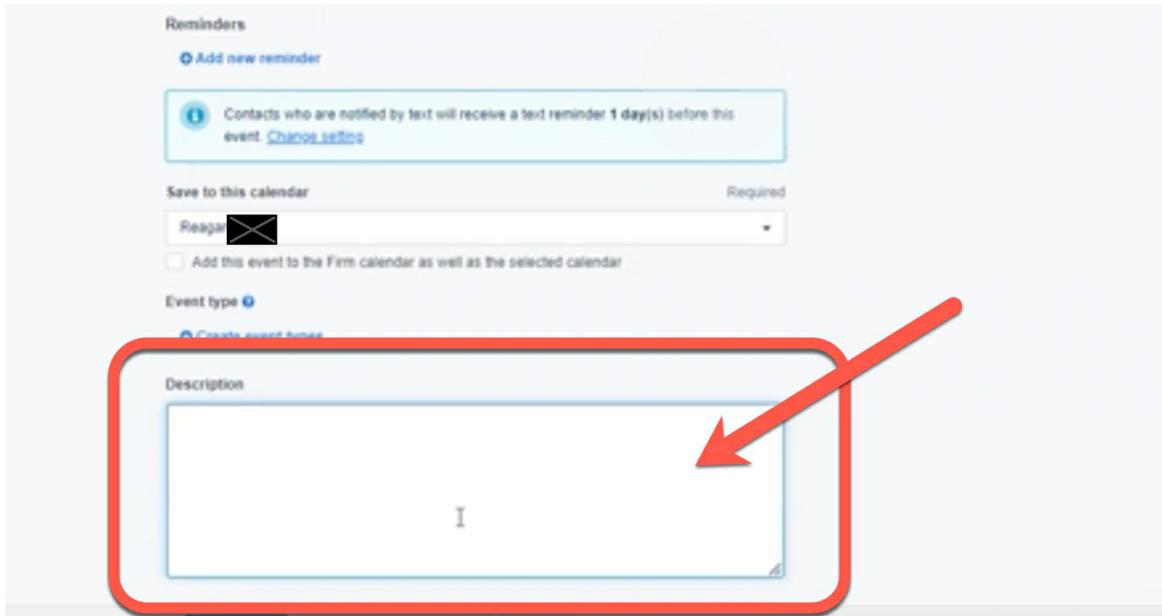
Find firm users or contacts to invite

Suggested attendees
 No suggestions at this time.

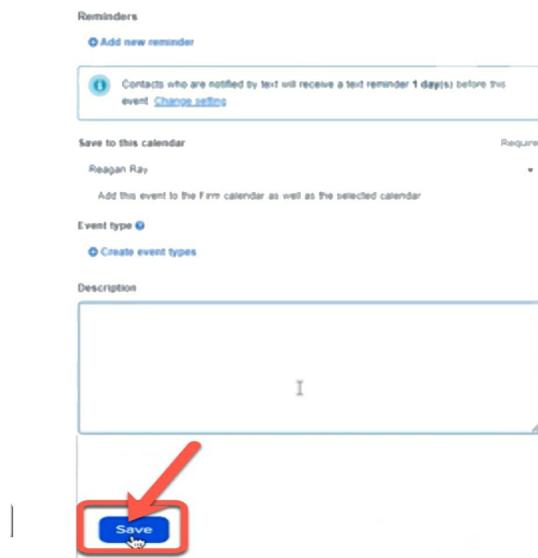
Then, scroll down the "Description" field and enter in:

- Why the meeting was scheduled manually.
- Any coming court date.

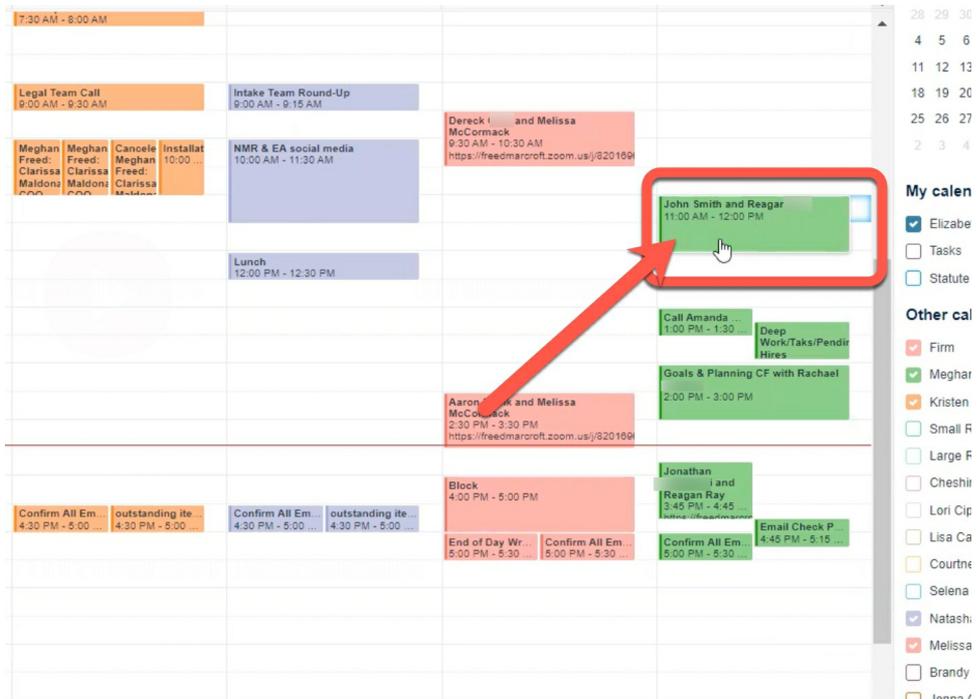
- The Goals and Planning Session link for the sales team member.



Select "**Save**" at the bottom when all information is entered.



The **calendar event** will now populate in the **Sale Representative's calendar in CLIO**.



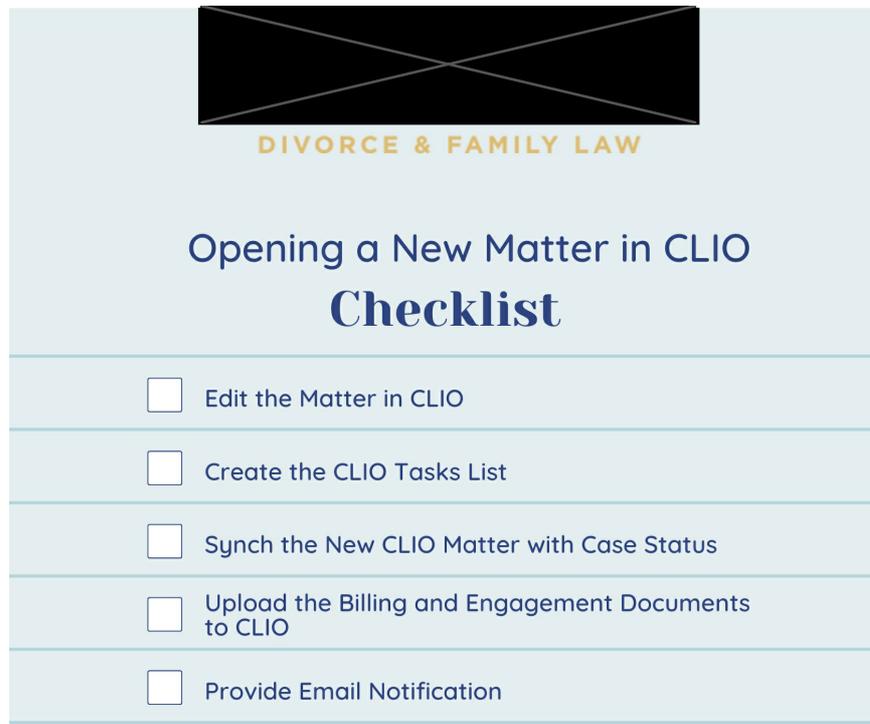
Steps to Open a New Matter in CLIO

When **opening** a new matter in CLIO, several actions that need to take place.



In this **training**, we will **review** the **step-by-step process of each**.

Refer to the following **Opening a New Matter in CLIO Checklist** to guide your learning.



DIVORCE & FAMILY LAW

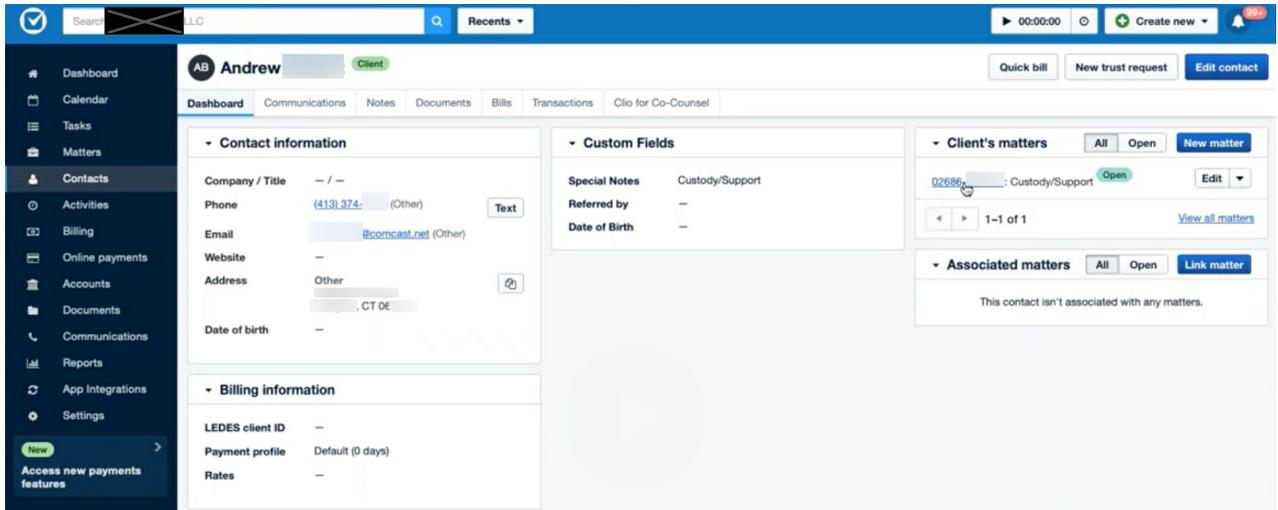
Opening a New Matter in CLIO Checklist

- Edit the Matter in CLIO
- Create the CLIO Tasks List
- Synch the New CLIO Matter with Case Status
- Upload the Billing and Engagement Documents to CLIO
- Provide Email Notification

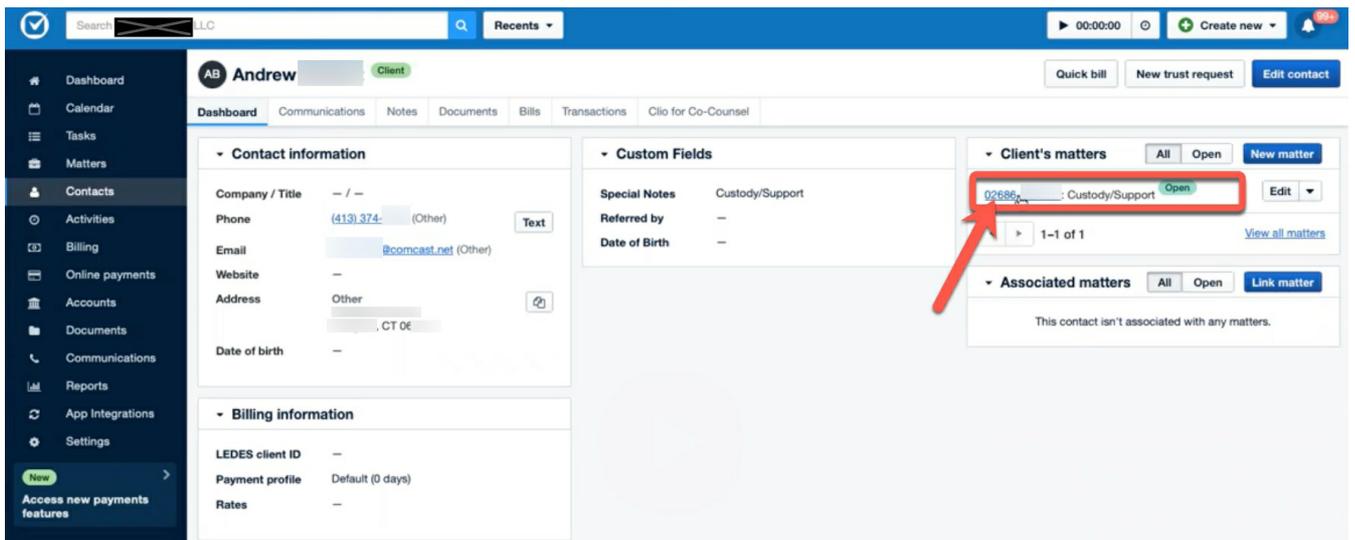
Editing the Matter in CLIO

After hiring a PNC, first, we need to **edit the matter in CLIO**.

Navigate to the PNC's CLIO profile.



Select the **matter being hired for** in the **"Client's Matters"** section.



CLIO will populate the **matter information**.

Select "**Edit Matter**" in the top right of the matter information page.

The "**Matter Details**" will populate.

Edit matter: 02686 Update matter name/number when saving changes Save matter Cancel

SECTIONS

- [Matter details](#)
- [Matter permissions](#)
- [Matter notifications](#)
- [Related contacts](#)
- [Custom fields](#)
- [Billing preference](#)
- [Task lists](#)

Matter details

Client*
Andrew (@comcast.net)

Matter description*
Custody/Support

Responsible attorney **Originating attorney**

Client reference number **Location**

Practice area **Matter Stage**

Matter status

Open date **Closed date**

Pending date

Statute of limitations date Statute of limitations date satisfied

Enter in the **"Matter Description."**

Matter details

Client*
Andrew (@comcast.net)

Matter description*
Consulting in a Custody/Support

Responsible attorney **Originating attorney**

Client reference number **Location**

Practice area **Matter Stage**

Select the **"Responsible Attorney."**

Remember, this **information** can be **found** in the **Slack Sales channel**.

Matter details

Client *
Andrew [redacted]@comcast.net

Matter description *
Consulting in a Custody/Support

Responsible attorney
Find a firm user

Originating attorney
Find a firm user

Location
Zoom-Melissa

Matter Stage
Find a matter stage

Open date **Closed date**

Select the **"Originating Attorney."**
Remember, this **will always be Meghan Freed.**

Responsible attorney
Courtney

Originating attorney
Meghan Freed

Client reference number
Enter reference number

Location
Zoom-Melissa

Practice area
Find a practice area

Matter Stage
Find a matter stage

Matter status
Open

Open date **Closed date**
07/25/2023 mm/dd/yyyy

Next, select the **"Practice Area"** from the drop-down menu.

Responsible attorney: Courtney

Originating attorney: Meghan Freed

Client reference number: Enter reference number

Location: Zoom-Melissa

Practice area: **Consulting Arrangements**

Matter Stage: Find a matter stage

Closed date: mm/dd/yyyy

Input the appropriate **individuals** in the **"Matter Notifications"** field.
 This is always the **billing specialist, assigned attorney, and assigned paralegal.**

Specific users or groups

Matter notifications

Firm users that you select will receive notifications when the status of this matter changes or the matter is deleted. They will also be notified when documents are uploaded by clients and related contacts.

Firm user

Lori (x) Courtney (x) **Carrie (x)**

Related contacts

Information for related contacts appears on the matter dashboard. These contacts will also appear in future conflict checks.

Next, select the **Dragon responsible** for the **"Sales Team Member"** field in the **"Custom Fields"** section.

NPS/Client Happiness Communication Status

Client Score Junior Attorney

Responsible Paralegal **Sales Team Member ***

Judgment Date enter at end mm/dd/yyyy

Internal Referral Credit * N/A

Matter Source *

Matter Notes
Custody/Child Support Planning.....Not married, Children's Mother and I are separating and we have three children together. Planning purposes, what to expect, identifying/finding legal partner

Then, enter in and select the **"Responsible Paralegal."**

Client Score Junior Attorney

Responsible Paralegal

Sales Team Member * Melissa

Deadline to file Motion to Open mm/dd/yyyy

External Referral (N/A if none) * N/A

Matter Source *

Matter Notes
Custody/Child Support Planning.....Not married, Children's Mother and I are separating and we have three children together. Planning purposes, what to expect, identifying/finding legal partner

Select the **individual responsible** for the **"Internal Referral Credit"** field if one exists.

If there is **not** an **internal referral**, select **"N/A."**

mm/dd/yyyy

mm/dd/yyyy

Internal Referral Credit *

N/A

N/A

Natasha

Brandy

Misty

Shelby

Michael

Katy

External Referral (N/A if none) *

N/A

Matter Notes

Custody/Child Support Planning.....Not married, Children's Mother and I are separating and we have three children together. Planning purposes, what to expect, identifying/finding legal partner

Matter Status

Spouse Plaintiff/Defendant

Type in an **"External Referral"** if there is one.
 If there is **none**, enter **"N/A."**

Internal Referral Credit *

N/A

External Referral (N/A if none) *

N/A

Matter Source *

Matter Notes

Select the **"Matter Source"** from the field drop-down menu.

Internal Referral Credit *

N/A

External Referral (N/A if none) *

N/A

Matter Source *

Networking

Referral (Atty/Professional)

Referral (Client)

Referral (F&F)

SuperLawyers

Website

Other

Matter Notes

Custody/Child Support Planning.....Not married, Children's Mother and I are separating and we have three children together. Planning purposes, what to expect, identifying/finding legal partner

Spouse Plaintiff/Defendant

Closing Matter Reason

In the **"Billing Preference" section**, enter the **rates** for the:

- **Managing Attorneys**
- **Brandy Thomas**
- **Attorneys**
- **Paralegals**

Custom billing rates

Firm user or group *	Managing Attorney	at	\$ 495.00	✕
Firm user or group *	Brandy Thomas	at	\$ 495.00	✕
Firm user or group *	Attorneys	at	\$ 445.00	✕
Firm user or group *	Paralegals	at	\$ 225.00	✕

Matter budget

Set a budget for this matter

Next, select the **"Trust Balance Notification"** selection box.

This will **notify specific parties** when the **evergreen retainer balance gets low**.

Paralegals at \$ 225.00 ✕

[Add a custom billing rate](#)

Matter budget

Set a budget for this matter

Trust balance notification

Notify firm users when matter trust funds are low

Task list

Upon checking the "Trust Balance Notification" selection box, the **"Notify when trust funds are below"** field will populate.

In the field, **input** the **monetary value** that is **half** of the **evergreen retainer**.

Trust balance notification

Notify firm users when matter trust funds are low

Notify when trust funds are below... *

\$ 1000.00

Notification recipients *

Melissa

The **"Notification Recipients"** field will **also** populate.

Enter the **individuals** who should be **notified** when the **evergreen retainer** is **half used**.

These are the:

- **Billing Specialist**
- **Assigned Attorney**
- **Assigned Paralegal**

\$ 1000.00

Notification recipients *

Lori Courtney Carrie

Task lists

When all this **information** has been **input appropriately**, select **"Save Matter"** in the top right corner of the Matter page.

Update matter name/number when saving changes ?

Save matter

Cancel

Task Status

Funds Status

NPS/Client Happiness

Communication Status

Client Score

Junior Attorney

Responsible Paralegal

Carrie

Sales Team Member*

Melissa

Enter in and **select** the appropriate "Task List."

Important Note: "Consulting" and "Learn & Decide" are the **same matter type**.

Next, input the **individual receiving** the **tasks** for the "Assign To" field.

This should **always** be the **paralegal assigned** to the matter.

Assign task list

Task list*
Strategy Session - Learn & Decide (v. 2023)

Assign to*
Carrie

Notify task assignees via email

Matter
02686

Trigger date* ⓘ
07/25/2023

Assign task list Cancel

Then, select the task list "**Trigger Date**" using the **calendar widget**.

Important Note: It is Freed Marcroft's policy to **never** assign a **same-day task list**, except in cases of emergency.

Assign task list

Task list*
July 2023

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today

07/20/2023

Assign task list Cancel

Finally, select "**Assign Task List.**"

Assign task list

Task list*
 Strategy Session - Learn & Decide (v. 2023)

Assign to*
 Carrie

Assign all tasks in this list to this assignee
 Notify task assignees via email

Matter
 02686

Trigger date*
 07/25/2023

Assign task list Cancel

The newly assigned task list will populate the CLIO Matters page "Tasks" tab.

02686 Consulting in a Custody/Support

Dashboard Custom Fields Activities Calendar Communications Notes Documents **Tasks** Bills Transactions Clio for Co-Counsel

Assign task list New task

Outstanding Completed MM/DD/... MM/DD/... All dates

Outstanding	Completed	MM/DD/...	MM/DD/...	All dates	Search	Columns	Filters
<input type="checkbox"/>	<input type="checkbox"/>	08/01/2023					
<input type="checkbox"/>	<input type="checkbox"/>	08/02/2023					
<input type="checkbox"/>	<input type="checkbox"/>	08/03/2023					
<input type="checkbox"/>	<input type="checkbox"/>	08/03/2023					
<input type="checkbox"/>	<input type="checkbox"/>	08/04/2023					
<input type="checkbox"/>	<input type="checkbox"/>	08/07/2023					
<input type="checkbox"/>	<input type="checkbox"/>	08/07/2023					
<input type="checkbox"/>	<input type="checkbox"/>	08/08/2023					

Task list assigned: Strategy Session - Learn & Decide (v. 2023)