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.

\odot	Search	ITC	Q Recents -		► 00:00:00 📀 Create new -
*	Dashboard	Personal Dashboard Firm Dashi	board Firm Feed		
•	Calendar	Today's Agenda (Hide)			
≔	Tasks	(Line)			
=	Matters	0 Tasks Due Today O	You have no tasks due today	5 Calendar Events	9:00 AM Senior Legal Workflow
	Contacts				10:00 AM Sales Team + Natasha Weekly
Ø	Activities		You have 1 overdue task		Now Case Status
۲	Billing				2:00 PM Dentist Appt
	Online payments				4:30 PM Confirm All Emails Added to Shared Cases
盦	Accounts				
•	Documents	Hourly Metrics for Natasha	Ð	Billing Metrics for Firm 0	
с.	Communications				
LM.	Reports		Billable Hours Target	Draft Bills	Total in Draft
c	App Integrations	You haven't set up your billing target		27	\$14,183.25
۰	Settings		SET UP YOUR TARGET		
New) >	-		Unpaid Bills	Total in Unpaid
Acces	ss new payments res			111	\$78,099.19
					© <u>View</u>
				Overdue Bills	Total in Overdue
				109	\$76,916.19
e	Resource center				@ <u>XIGM</u> @ <u>VIG</u>
	Natasha				
	LLC				
	Collapse				

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.

Goals & Planning	Sele	ct a D	ate &	Time				
Conference	Marc	ch 2023				<	>	Friday, March 17
1hr	SUN	MON	TUE	WED	THU	FRI	SAT	10:30am
\$250 USD				1	2	3	4	
Welcome to	5	6	7	8	9	10	11	11:45am
We're happy help you with booking your next step: The Goals & Planning	12	13	14	15	16	17	8	
Conference.	19	20	21	22	23	24	25	
The fee for our Goals & Planning Conference is \$250, but what's most	26	27	28	29	30	31		
forward. When you keep this initial appointment that you set, the \$250 will be refunded to you at the end of it.	Time ©	zone Eastern T	ime - US	& Canad	a (10:47a	m) -		
On the next screen you will see a set of questions that will help you get the most value from our time together.								
Cookie settings	Tro	oubleshoo	ot					

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.**

≡ keap	â	ⓒ☆☆ ♀ ⊘	Q • Find a contact	•	
Dashboard Contacts 🛩	Tasks				
Dashboard Friday March 03, 2023					
*Show Stats" has been s	hared to your dashboard by TRI Developer.			×	
Show Stats		e			
Today's Shows		0			
This Week's Shows		12			
Contacts Needing	Call/Meeting/Appt Type	Ð			
cognition and	May Bonart				
tran transform and	view Report				
Annual Terra		1			
Hired Another Atto	rney stats	Э			
Contracts from team too	View Report				
true trusteen are		2			
and and local					

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

≡ keap a or	2 # _ @	Q • 860	0
Dashboard Contacts ~ Tasks		1 No name	t (860) 916-
Dashboard _{riday March} 03, 2023		1 No name	ئي (860) 221-
Show Stats has been shared to your dashboard by TRI Developer.		1 Althea	t (860) 888-
Show Stats	Ø	1 Kristin	ر (860) 614-
Today's Snows	12	1 Norris	tي (860) 816-
Contacts Needing Call/Meeting/Appt Type	a	1 Leoni	% (860) 930-
View Report	- 1	1 Elroy	te (860) 922-
	1	1 Beatrice	t (860) 840-
Active and Tority		1 Shanique	t, (860) 725-
Hired Another Attorney stats	Ø	1 Marina	% (860) 997-
View Report	10		
trad invaluation and			

Search results will populate.

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



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

ag423.infusionsoft.com/Contact/m	nanageContact.jsp?view=edit&ID=21250&sear	chResult=21250			۵	* 🛛 🛊 🛛 🏶 🗤
🕅 473 🖪 2 🛞 Connecticut Judic	🕑 Clio - Calendar 📢 (44) Second Satur 🔇	New Tab 👸 44 🗼 Infusionsoft - Log	g k Dashboard - Dece	Seafood-and-Chic	Freed Marcroft LLC	ቪ LinkedIn 🔍 Ruby Chat
3	≡ keap		③ Q • Find a contact.		Ð	
1	Dashboard Contacts ~ Tasks					
Skye (back to se	earch results)					
General Address Additional	Info Person Notes Intake Data Appoi	ntment Data New Client Questionnair	es Do Not Use This Tab	Custom Fields Tag	Linked Contacts	Access Privileges
General Information		Score				
First Name	Skye	Load Score	44444			
Last Name		Lead Score	000000			
Company		Phone / Fax	¢			
Company	Choose a company	Phone 1	Mobile ~ (407) 766			
	Go Search Clear	Phone 2	Work ~			
Job Title		Fax 1	Work Y			
Intake Type	Please select an intake type ~					
Lead Source		Email / Soc	al			
Owner	Reagan	Email	egmail.com	$\mathbf{\times}$		
			Status: Unconfirmed Manage En	mail Status		
Billing Address		Website		f		
Street Address 1	795	Facebook		ſ		
Street Address 2		Twitter		U		
City		LinkedIn		in		
State	СТ	Instagram		0		
Postal Code		Snapchat		٥		
		YouTube				

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

es			View All Note Template View All Note Template
ils Contact da	pes not have any Notes		
rm Submissio	ons		View All Internal Forms Y Fill Out
Date	Form	Submitted By	Referring URL
2/24/2023	Goals and Planning O	Reagar	$https://ag423.infusionsoft.com/Contact/oldManageContact_legacy.jsp?view=edit&lD=21250$
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 I	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&iD=21250& searchResult=
		loon	https://ao423.infusionsoft.com/app/nav/link?paySystem=pay.mvnav&navModule=contact&navLin

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	s not have any Notes				
Form Submission	s			Internal Forms Goals and Plannin View All 🗸 Intake/Appointment	g Outcome Form the Setting Form ut
Date	Form	Submitted By	Referring URL		
2/24/2023	Goals and Planning O	Reagai	https://ag423.infusionsoft.com/Contact/oldManageContact_legacy.jsj	p?view=edit&ID=21250	
2/23/2023	Lintake/Appointment S	Melissi	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edi	t&ID=21250	
2/23/2023	Goals and Planning O	Melissi	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edi	t&ID=21250	
2/21/2023	Intake/Appointment S	Melissi	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edi	t&ID=21250&searchResult=	
2/16/2023	Intake/Appointment S	Jenna	https://ag423.infusionsoft.com/app/nav/link?navSystem=nav.mynav&r	navModule=contact&navLin	
Recent Email Hist	tory			Sync Email Account Send Email	View Entire History
Received O Se	ent 🕘 Campaign 🥚 Notification 🥚	Bounced			
Email Sta	atus Date	Subject	EmailTo	EmailFrom	Template

Then select "Fill Out."

Form Submissio	ns		View All Intake/Appointment Settin Fill Out
Date	Form	Submitted By	Referring URL
2/24/2023	Soals and Planning O	Reagar	https://ag423.infusionsoft.com/Contact/oldManageContact_legacy.jsp?view=edit&iD=21250
2/23/2023	Lintake/Appointment S	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250
2/23/2023	Soals and Planning O	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&ID=21250
2/21/2023	Lintake/Appointment S	Melissa	https://ag423.infusionsoft.com/Contact/manageContact.jsp?view=edit&lD=21250&searchResult=
2/16/2023	Lintake/Appointment S	Jenna	https://ag423.infusionsoft.com/app/nav/link?navSystem=nav.mynav&navModule=contact&navLin
Recent Email His	story		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.

	Setting Form
NC Information	
nitial Call Date *	02-15-2023
First Name *	Skye
ast Name	
mall	r @gmail.com
he email will be addressed 'Dear alutation field (Mr. Smith will appe	and will appear exactly as typed into the Email are as Dear Mr. Smith)
mail Salutation *	Skye
Phone 1 Type	Mobile
Phone 1	(407) 766
Phone 2 Type	Work 🗸
Phone 2	Phone 2
ITM Call?	○ Yes ○ No
you have collected a Mobile Nu om the dropdown below once yo ther reminders.	mber above, please duplicate it in the field below. Select Yes ou have confirmed permission for appointment notifications and
Nobile Number	(407) 766-
nission 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

f setting an appointmer <mark>f</mark> t or case eva fields below as appropriate. If no loca	luation, then please be sure and check son ation is selected then no emails will be sent	nething from all if an appointment
Appointment Date	02-24-2023	Ē
Appointment Time	10:30 AM	~
Appointment Location *	Zoom-Reagan	~
Consult Set With	Reagan	~
Retainer	2000.0	

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

	Intake Task Assignment *	Reaga	~	
	Intake Completed By *	Jenna	~	?vie
	Intake Completed By if Other	Intake Completed By	If Other	≩ID=
				≩ID=
				≩ID=
				a∨M
				S
Boui				
	Save			

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.

\odot	Searc	t LLC	Q Recents -		► 0
* ⊡	Dashboard Calendar Tasks	02625- Consulting Regarding a Dissolution of Marriage Dashboard Custom Fields Activitie	e s Calendar Communications	Notes Documents Tasks Bills	Transactions Clio fc
	Matters Contacts Activities Billing Online payments Accounts	Work in progress \$45.00 Unbilled \$45.00 Draft \$0.00 Quick bill	Outstanding balance \$0.00 View bills	Matter trust funds Image: State of the	MG Mari Clien Phone Email Address
	Documents Communications Reports App Integrations Settings	Time S45.00 0.20h Add tir Octails Matter Consulting Regardi description of Marriage Responsible Maya	ng a Dissolution Color Sta Notes	om Fields tus — nager —	Related cr Timelin JUN 6, 2023 Brandy k
New	>	attorney	Task Stat	us —	message to schedu

Locate and copy the CLIO reference identification number.

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

0.00	oco oddini oddinoodia (
$\leftarrow \rightarrow$	C 🌘 app.clio.c		1 573936865								
0 🖻	E-Services - CT Judi	🚖 Case Status									
\oslash	Search				٩	Recents 👻					
*	Dashboard	Consulting Reg	garding a Dissolution	of Marriage							
Ċ	Calendar	Dashboard	Custom Fields	Activities	Calendar	Communications	Notes	Documents	Tasks	Bills	Transactions
⊨	Tasks										
	Matters	+ Finan	✓ Financial								- C
4	Contacts	Wo	ork in progress 🤅	0	Outstanding balance \$0.00			Matter trust funds \$2,000.00			MG
1	Activities		\$45.00								
	Billing		Unbilled \$45.00			View bills		Min thresh	old: \$1,000	0.00 <u>Edit</u>	Phor
	Online payments		Quick bill					Ne	w reques	t	Emai
盦	Accounts		QUICK DIII								Addr
-	Documents	Time 📀	\$45.00 0.20h	Add time		Expense	es -	Add expense			
e.	Communications										Rela
Last	Reports	- Detai	le			- Cust	om Eiel	40			

Sear	ch Clients	Search by Na	ame or Phone			Firm	Insights	Cases	Clients	Inbox +Mdd Case	9 ~
Filters	s: Practice	Area Date	Status NPS	Message	Client Interactions Clear Filters	s Show only • All	Open Cases				
0 selec	ted ID ‡	Client ‡	ī	Primary ‡	Date 🗘	Status 🗘	≎ Update	d			
	01835-Fr	\succ		Brandy	05/26/2021	• Discovery Kickoff Conference and First Financial Affidavit	06/06/202	23			
	02562-Pa	Sunil	S	Selena	04/10/2023	• Collaborative Planning Session	06/06/202	23			
	02513-Va	Gloria	5	Selena	02/23/2023	 Pursue Resolution 	06/06/202	23			
	02624-So	Jasor	5	Selena	06/06/2023	 Introductory Information 	n 06/06/202	23			
	02622-S	Scott	5	Selena	06/05/2023	Consulting Session	06/06/202	23			2

Now, navigate to the Case Status Home page.

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

			Firm	Insights Cases	Clients	Inbox	9 ~
by Name or P	Phone					+ Add Case	Ŀ
ate Status	NPS Message	Client Interactions Clear Filters	Show only • All	Open Cases		Sync wi	th Lio
	Primary 🗘	Date 🗘	Status 🗘	≎ Updated			
rcroft	Brandy	05/26/2021	• Discovery Kickoff Conference and First Financial Affidavit	06/06/2023			
wa	Selena	04/10/2023	• Collaborative Planning Session	06/06/2023			
entino	Selena	02/23/2023	 Pursue Resolution 	06/06/2023			
usa	Selena	06/06/2023	Introductory Information	06/06/2023			

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."

		FILIN INS
	Sync with Clio	
less	All cases Individual case)pe
	Sync case data by entering integration ID below.	_
Y	1573936865	
/ Tł	Syncbase	
Benoit	• Collaborative Pl 04/10/2023	lanning

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.

DIV					Firm Insi	ghts C	ases Clients	Inbox
Sea	rch Clients	Search by Name or Phone						+ Add Case
Filte	rs: Practice	Area Date Status N	PS Message	Client Interactions Clem Filters	Show only • All Oper	n Cases		
0 sele	ected							
<	ID ‡	Client ‡	Primary 🗘	Date 🗘	Status ‡	Updated		
	02625-Ga	Mari	Мауа	06/06/2023	Introductory Information	06/06/2023	3	
	02491-Th	Heather	Selen	02/02/2023	 Divorce & Carry Out the Judgment 	06/06/2023	3	
	02607-Lo	Lopez Second Parent Adop	Selen	05/18/2023	• Gather & Submit Documents	06/06/2023	3	
	02486-M	Ashley	Selen	01/26/2023	Initial Discovery	06/06/2023	3	
	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.**

DIVORCE & FARILY LAW		Firm Insights Cases Client	s Inbox 💄~
← Case Info Share Status Internal Messaging	Appointments	Close Case Place On	Hold Sync
Case ID: 02625 Client: Mari			
Not Activated	Current Status		Last updated 06/06/2023
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	1 2 Introductory Information Update Status	x	>
Click to add group name + Add Clients	Messages Documents	Automation Checklist	
1 Client Last Interaction			?)

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

S	E-Services - CT Judi	Case Status			
	\succ				Firm Insights
~	Case Info	Share Status	Internal Messaging	Appointments	Close C
C t	Case ID: 02625 Case Notes (Only visible https://app.clio.com/nc	Client: Mari e to the firm) /#/matters/1573936865	5		
s	Staff members			2	
2	2 Staff members		+ Add Staff member		
N	Meghan	Make Primary	Remove		
N	Мауа	Primary			
кет	love case				

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

2 Staff members + Add Staff member Meghan Make Primary Remove	
Meghan Make Primary Remove	
Maya Primary A	

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.

Case Info	Share Status	Intern	al Messaging
Case ID: 02625	Client:		
ittps://app.clio.com/i	nc/#/matters/1573936	865	
Staff members			
4 Staff members		+ Add Staff	member
Meghan	Make Primary	Remove	
Melissa	Make Primary	Remove	•
Carrie	Primary		- •

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

Staff members			
4 Staff members		+ Add Staff	member
Meghan	Make Primary	Remove	
Melissa	Make Primary	Remove	
Carrie	Primary		
Мауа	Make Primary	Rekeve	

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



Now the CLIO profile is synched 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.

) Searc	<		Q Recent	s 🔹						▶ 00:00:0	0 0
Dashboard	Today	 Image: Thu, Jun 15, 	, 2023 🕶			Age	nda Day Week V	/ork week Month	More •	New event	-
Calendar	Eliz	zabetł	Firm	Meghan Freed	Kristen Marcroft	Natashi	Melissa		Reagan		
Tasks	All Day				7:30 AM - 8:00 AM						-
Matters	8:00 am										
Contacts											
Activities	ecou am			Legal Team Call 9:00 AM - 9:30 AM	Legal Team Call 9:00 AM - 9:30 AM	9:00 AM - 9:15 AM		_			-
Billing	10:00 am			he and he are been as the second	Internet internet internet internet	NUC 6 Characteristic	Dereck Ortiz and M McCormack 9:30 AM - 10:30 AM	lelissa			-
Online paymente	10:00 am 10:0	R & EA social media 00 AM - 11:30 AM		Freed: 10:00 Meghan Clarissa Freed: Inc.	Meghan Meghan Cancele Installat Freed: Freed: Meghan 10:00 Clarissa Clarissa Freed:	10:00 AM - 11:30 AM	https://freedmarcrof	.zoom.us/j/820166	-		4
	11:00 am			Maldoni Ciarissa bo	ok. Maldona Maldona Clarissa 30	-					J
Accounts											
Documents	12:00 pm	ASS - Mkto Analytics		liQuilt		Lunch					-1
Communications	12:1	00 PM - 1:30 PM		Partners Board		12:00 PM - 12:30 PM					
Reports	1:00 pm			of Director Meeting				R	Call Amanda		-
App Integrations				12.00					1:00 PM - 1:30	Deep Work/Taks/Pendir	-
Settings	2:00 pm Sal	es & Marketing Coaching and						1	Goals & Planning	CF with Rachael	-11
) >	Q8 2:00	A 0 PM - 3:00 PM s://us02web.zoom.us///87968170	00				Aaron Frank and M	lelissa	Austin 2:00 PM - 3:00 PM		
ess new payments	3:00 pm		L.				2:30 PM - 3:30 PM https://freedmarcrof	.zoom.usij/820169			
ies											-
	4:00 pm	& LM - Meeting re Bio 0 PM - 4:30 PM					Block 4:00 PM - 5:00 PM		Mateovici and Reagan Ray		
				Confirm All Em outstanding 4:30 PM - 5:00 4:30 PM - 5:	ite Confirm All Em outstanding ite	Confirm All Em outstandin 4:30 PM - 5:00 4:30 PM - 5	ig ite		3:45 PM - 4:45	Email Chack P	
	5:00 pm						End of Day Wr 5:00 PM - 5:30	Confirm All Em 5:00 PM - 5:30	Confirm All Em 5:00 PM - 5:30	4:45 PM - 5:15	
	6:00 pm CL	ASS - SM Marketing 0 PM - 7:00 PM									
	7:00 pm										

The "Event Details" box will populate.

New event				
	Event details		Invite attendees	
	Title	Required	Find firm users or contacts to invite	
	1		Type in name	*
	Start time Required End time Required		Suggested attendees	
	06/15/2023 🛱 11:00 AM 🖸 06/15/2023 🛱 11:30 AM	0	No suggestions at this time.	
	All Day Repeat			
			6	
	Video Conferencing			
	Matter			
	Type in a matter name	-		
	Previous and the second s			
	Add new reminder			
	Contacts who are notified by text will receive a text reminder 1 day(s) before this event. Change setting	s		
	Save to this calendar	Required		
	Reagan Ray	•		
	Add this event to the Firm calendar as well as the selected calendar			
	Event type 0			
	Create event types			
	Description			

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

Title	Required Find firm users or contacts to in
John Smith and Reagan	Type in name
06/15/2023 🗂 11:00 AM O 06/15/202- 11:30	AM O No suggestions at this time.
All Day Repeat	

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

Title	Required	Find firm
		Find firm
John Smith and Reagan		Type in r
Start time Required	End time Required	Suggestee
06/15/2023 🗂 11:00 AM 🛛	D 06/15/2023 🗂 12:80 PM Ø	No sugges
Location		

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.

event. Charge setting	d by text will receive a text reminder 1 $day(s)$ before this	8
Save to this calendar	,	Required
Reagan		
Add this event to the Firm call	endar as well as the selected calendar	
Event type O		
A Create event house		
Description		

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

Contacts event C	s who are notified by test will receive a test remin haron selfing	der 1 day(s) before this
Save to this cale	ndar	Regun
Reagan Ray		
Add this even	t to the Firm calendar as well as the selected cal	ender
Event type O		
O Create even	t types	
Description		
	I	

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.

\odot	Search	LLC	Q Recents -		► 00:00:00 O Create new -
*	Dashboard Calendar	AB Andrew Dashboard Commun	Client	Sactions Cilio for Co-Counsel	Quick bill New trust request Edit contact
	Tasks Matters	- Contact inform	nation	- Custom Fields	Client's matters All Open New matter
۵	Contacts	Company / Title	-/-	Special Notes Custody/Support	02686 Contraction Copen
Ø	Activities	Phone	(413) 374- (Other) Text	Referred by -	t b 1-1 of 1 View all matters
Ø	Billing	Email	Bcomcast.net (Other)	Date of Birth -	
•	Online payments	Website	-		Associated matters All Open Link matter
盦	Accounts	Address	Other 🖉		
•	Documents		, CT 06		This contact isn't associated with any matters.
۰.	Communications	Date of birth			
Leil	Reports				
S	App Integrations	 Billing information 	ation		
۰	Settings	LEDES client ID	-		
New	>	Payment profile	Default (0 days)		
Acces	s new payments es	Rates	-		

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



CLIO will populate the matter information.

\odot	Search	LC Q Recents -		► 00:00:00 O Create new -
*	Dashboard	02686 Custody/Support		Duplicate Share Edit matter
۳	Calendar	Dashboard Custom Fields Activities Calendar Commun	ications Notes Documents Tasks Bills Transactions	Clio for Co-Counsel
=	Tasks	- Financial		A state
•	Matters	* Financiai		- Contacts Export
٠	Contacts	Work in progress 📀 Outsta	nding balance Matter trust funds	AB Andrew
Ø	Activities	\$0.00	\$0.00 \$0.00	Client
œ	Billing	Unbilled \$0.00 Draft \$0.00	New request	Phone (413) 374 Text
8	Online payments	Quick bill		Email <u>Reconcast.net</u> (Other)
â	Accounts			Address (2)
-	Documents	Time 🛛 - Add time	Expenses - Add expense	(Other)
¢.	Communications			Related contacts (0) Add
Lat	Reports	- Details	- Custom Fields	
æ	App Integrations			Timeline Filters ✓
۰	Settings	Matter description Gustody/Support	Color Status -	JUL 25, 2023
New		attorney	Notes	Natasha reated matter note 'Note imported from
Acces	s new payments	Permissions Firm	Task Status -	8:12 am
featur	65	Originating - attorney	Funds Status -	Natasha motified namissions to 'Evenuona'
		Matter -	NPS/Client – Happiness	8:12 am
		notifications	Communication -	Natasha created Matter '02686-
		Practice area -	Client Score	8:12 am
		Client reference -	Junior Attorney -	Beginning of timeline
		number	Responsible -	
		Location Zoom-Melissa	Paralegal	Export
		Status	Sales Team Reagan	

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

				▶ 00:00:00 ⊘	Create ne	• • •
				Duplic	ate Share	Edit matter
ks Bills	Transactions	Clio for Co-C	counsel			
		•	Contact	s		Export
Matter to \$0 New 1	rust funds).00 request	P	Andre Client	ew (413) 374	ocast net (Other)	Text
		A	ddress	(Other)	(000.)	Ø
e		R	elated co	ontacts (0)		Add
			Timeline	,		Filters •
		JL	JL 25, 2023			
			Natasha	reated matter	note 'Note importe	ed from

The "Matter Details" will populate.

Edit matter: 02686			Update matter name/number wh	en saving changes	Save matter	Cancel 🔻
SECTIONS Matter details	Matter details					
Matter permissions Matter notifications	Client*					
Related contacts Custom fields	Andrev @comcast.net)			•		
Billing preterence Task lists	ICustody/Support					
	Responsible attorney		Originating attorney			
	Find a firm user	•	Find a firm user	•		
	Client reference number		Location Zoom-Melissa			
			Loon-webba			
	Find a practice area		Matter Stage	*		
	Find a practice area					
	Open Open					
	07/25/2023	Ċ	mm/dd/yyyy	8		
	Pending date					
	mm/dd/yyyyy	Ë				
	Statute of limitations date					
	mm/dd/yyyy	Ċ	Statute of limitations date satisfied			

Enter in the "Matter Description."

Client*				
Andrew	@comcast.net)			•
Matter description*		-		
Consulting in a Cus	stody/Support			
				10
Responsible attorne	у	•	Originating attorney	l.
Responsible attorne Find a firm user	у	۱. ۲	Originating attorney Find a firm user	•
Responsible attorne Find a firm user Client reference num	y nber	¥,	Originating attorney Find a firm user Location	•
Responsible attorne Find a firm user Client reference num Enter reference num	y nber nber	*.	Originating attorney Find a firm user Location Zoom-Melissa	•

Select the "Responsible Attorney."

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

client*			
Andrew	@comcast.net)		•
Matter description*			
Consulting in a Cust	ody/Support		
Responsible attorney		Originating attorney	
Find a firm user		 Find a firm user 	•
		aution .	
Elizabeth		ocation	
Elizabeth Selena		7	
Elizabeth Selena Lisa		Zoom-Melissa	
Elizabeth Selena Lisa Lori		Zoom-Melissa	
Elizabeth Selena Lisa Lori Margaret		Zoom-Melissa Aatter Stage	Ţ
Elizabeth Selena Lisa Lori Margaret Courtney		Zoom-Melissa Matter Stage Find a matter stage	Ţ
Elizabeth Selena Lisa Lori Margaret Courtney Marcos		Zoom-Melissa Aatter Stage Find a matter stage	Ţ

Select the "Originating Attorney."

Remember, this **will always be Meghan Freed.**

Responsible attorney		Originating attorney		
Courtney		Meghan Freed	0	٠
Client reference number	7	Location		
Enter reference number		Zoom-Melissa		
Practice area	*	Matter Stage		
Find a practice area	•	Find a matter stage		٣
Matter status				

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

Responsible attorney		Originating attorney	
Courtney	•	Meghan Freed	•
Client reference number		Location	
Enter reference number		Zoom-Melissa	
Practice area		Matter Stage	
Find a practice area	*	Find a matter stage	*
Adoption			
Collaborative	14		
Consulting Arrangements			-
Custody Action		Closed date	

Input the appropriate **individuals** in the **"Matter Notifications" field.**

This is always the **billing specialist**, **assigned attorney**, **and assigned paralegal**.

Matter no	otifications			•	
Firm users to deleted. The	hat you select will recei	ve notifications whe	n the status of this uploaded by clien	matter changes or the ts and related contact	e matter is ts.
rm user	,				
Lori 🤇	© Courtney	© Carrie	٥		(
Delated	ontasts	~			

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*	
	*	0	Reagan	• •
Judgment Date enter at end			Melissa Legal Team Member	
mm/dd/yyyy			Reaga	
Internal Referral Credit*			Other	
N/A		•	N/A	
Matter Source*			Matter Notes	
		•	Custody/Child Support Plannin, Children's Mother and I are sep have three children together. Planning purposes, what to exp identifying/finding legal partner	gNot married, arating and we ect,

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

Alent Score		Junior Attorney	
	•		•
esponsible Paralegal		Sales Team Member*	
	6	Melissa	•
Selena		Deadline to file Motion to Op	en
Kelly		mm/dd/yyyy	
Carrie		External Referral (N/A if non	e)*
N/A		N/A	
atter Source*		Matter Notes	
	•	Custody/Child Support Plar Children's Mother and I are	ningNot married, separating and we
		Planning purposes, what to identifying/finding legal part	expect,

Select the **individual responsible** for the **"Internal Referral Credit"** field if one exists. If there is **not** an **internal referral, select "N/A."**

N/A Natasha Brandy Custody/Child Support PlanningNot m Children's Mother and Lare separating and	N/A	⊙ ▼ N/A	
Brandy Custody/Child Support PlanningNot m Children's Mother and Lare separating and	N/A Natasha	latter Notes	
Misty have three children together.	Brandy Misty	Custody/Child Support Pla Children's Mother and I are have three children togethe	nningNot married separating and we r.
Michael	Shelby 🖑 Michael	identifying legal par	expect, tner

Type in an "External Referral" if there is one.

If there is **none, enter "N/A."**

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

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

latter Source*		Matter Notes
Networking Referral (Atty/Professional) Referral (Client) Referral (F&F) SuperLawyers Website	•	Custody/Child Support PlanningNot married, Children's Mother and I are separating and we have three children together. Planning purposes, what to expect, identifying/finding legal partner
reterred Pronouns		Closing Matter Reason

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

- Managing Attorneys
- Brandy Thomas
- Attorneys
- Paralegals

Firm user or group			Hour	ly rate	
Managing Attorney	•	at	\$	495.00	(
Firm user or group*			Hour	ly rate*	
Brandy Thomas	•	at	\$	495.00	(
Firm user or group*			Hour	ly rate *	
Attorneys	•	at	\$	445.00	0
Firm user or group*			Hour	ly rate *	
Paralegals	*	at	\$	225.00	

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

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



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**.

Notify firm users whe	n matter trust funds are low	
Notify when trust funds	are below*	
\$ 1000.00		
A		
Notification recipients*		

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

Lon	Courtney	Came O	0

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

Task Status	•	Funds Status
NPS/Client Happiness	•	Communication Status
Client Score	•	Junior Attorney
Responsible Paralegal		Sales Team Member*
Carrie	0	Melissa

Task list Select a task list Assign to*	•
Select a task list Assign to*	•
Assign to*	
Select an assignee	•
Notify task assignees via email Matter 02686 Trigger date * 😧	
07/25/2023	

Enter in and select the appropriate "Task List."

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

learn]	•
Strategy Session, Learn & Decide (v. 2023)	
Select an assignee	
Assign all tasks in this list to this assignee	
Notify task assignees via email	
Matter	
02686-	
Trigger date * 🕢	
Trigger date * 📀 07/25/2023	

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	0 •
Notify task assignees via ems 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.

iet*			•				
		July 202	3		<u> </u>		
Mo	Tu	We	Th	Fr	Sa		
					1		
3	4	5	6	7	8		
10	11	12	13	14	15		
17	18	19	20	21	22		
24	25	26	27	28	29		
31	1	2		4	N		
		Today					0
0/2023							
					_		



Assign task list	×
Task list*	
Strategy Session - Learn & Decide (v. 2023)	•
Assign to *	
Carrie	0 •
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.

ch Freed Marcr	oft LLC		٩	Recents -				•	• 00:00:00	Create new	· •
oard	02686 Consulting in	a Custody/Support							Duplicate	Share	Edit matter
lar	Dashboard	Custom Fields	Activities Calend	dar Communications	Notes Documents	Tasks Bills Tran	sactions Clio for Co	o-Counsel			
5	Tasks								Assig	n task list	New task
es.	Outsta	nding Completed	MM/DD/	🗂 - MM/DD/	- MM/DD/ 📋 All dates 🔹				arch Columns • Filters •		
		Action	Due date	Name and desc	ription		Assigned by	Assigned to	Recorded time	Status	Task
payments nts	0	Mark complete	• 08/01/2023	D. Debrief from S (1) Follow Up with Lists	Strategy Session [Strategy S h Sr. following the SS, start	Carrie	Add time	Pending	Pending -		
unications	•	Mark complete	• 08/02/2023	E. Draft Strategy (1) Draft Strategy	Session Summary [Strateg) Session Summary	y Session - Learn & Decide	e) Melissa	Carrie	Add time	Pending	•
s tegrations s		Mark complete	• 08/03/2023	F. Review Strateg (1) Review the SS posts and video	y Session Summary [Strate S Summary from paralegal, resources for the Client. and	B. Schedule Strategy Sessi Session Call [Strategy Sess Decide] add any applicable blog d Send the Strategy Session	on & Post Strateg ion - Learn & m	Brandy	Add time	Pending	
> ayments		Mark complete	• 08/03/2023	G. Confirm if New (1) Confirm how (2) Confirm type	v Fee Agreement is Needed Client wants to proceed of Fee Agreement and upda	I Strategy Session - Learn	Melissa	Brand	Add time	Pending	-
		Mark complete	• 08/04/2023	H. Draft Fee Agre	eement [Strategy Session - I	Learn & Decide)	Melissa	Lori Ci	Add time	Pending	-
	0	Mark complete	• 08/07/2023	**Post Strategy S (1) Reach out to t	Session Meeting [Strategy S the Client via phone re: Pos	iession - Learn & Decide)** t Strategy Call	Melissa	Meliss	Add time	Pending	-
	0	Mark complete	• 08/07/2023	I. Send New Fee (1) Send the Full Responsible Para	Agreement to Client [Strate Fee Agreement to the Client alegail found in Client's Fold	igy Session - Learn & Decir it via HelloSign (CC der (Dropbox - Clio - Clien	de) Melissa	Brandy	Add time	Pending	-
rce center		Mark complete	• 08/08/2023	J. Save Fee Agre	ement & Set Applicable Tas	sk List (Strategy Session - L	Melissa	Car O T	ask list assigned: St	rategy Session	- 0