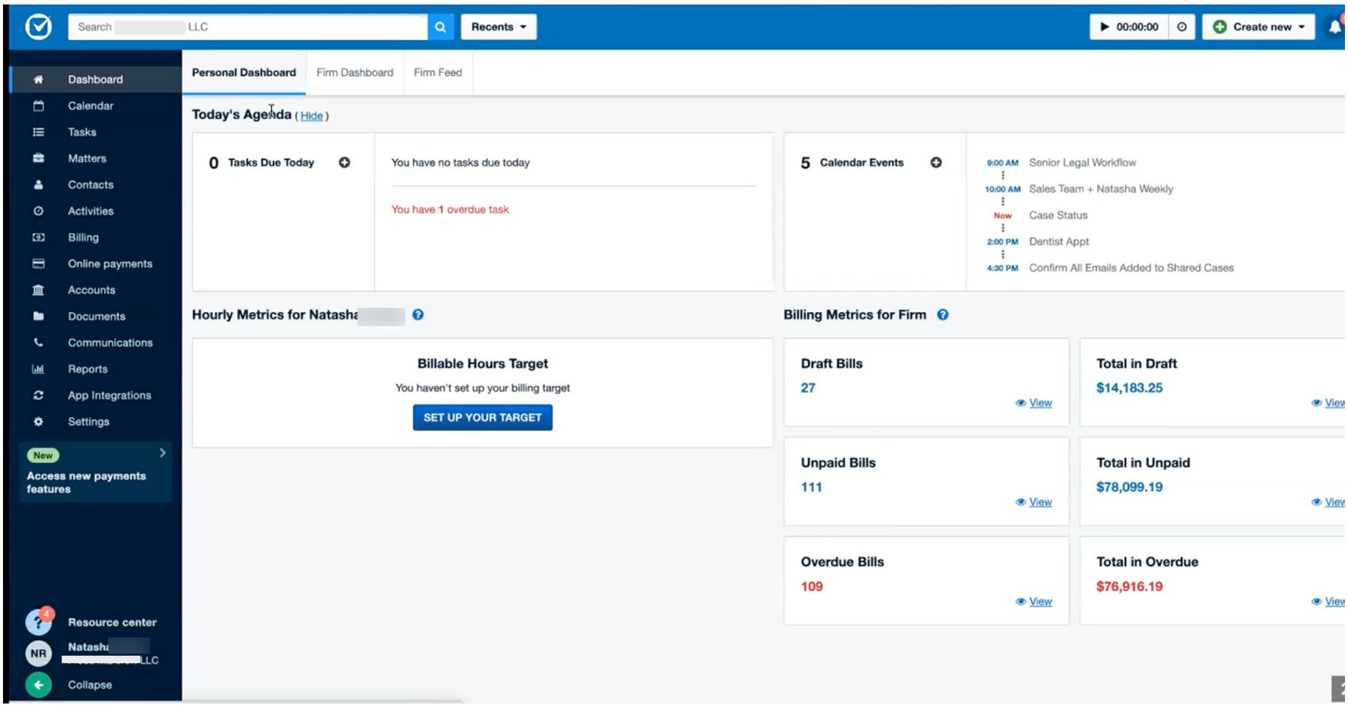
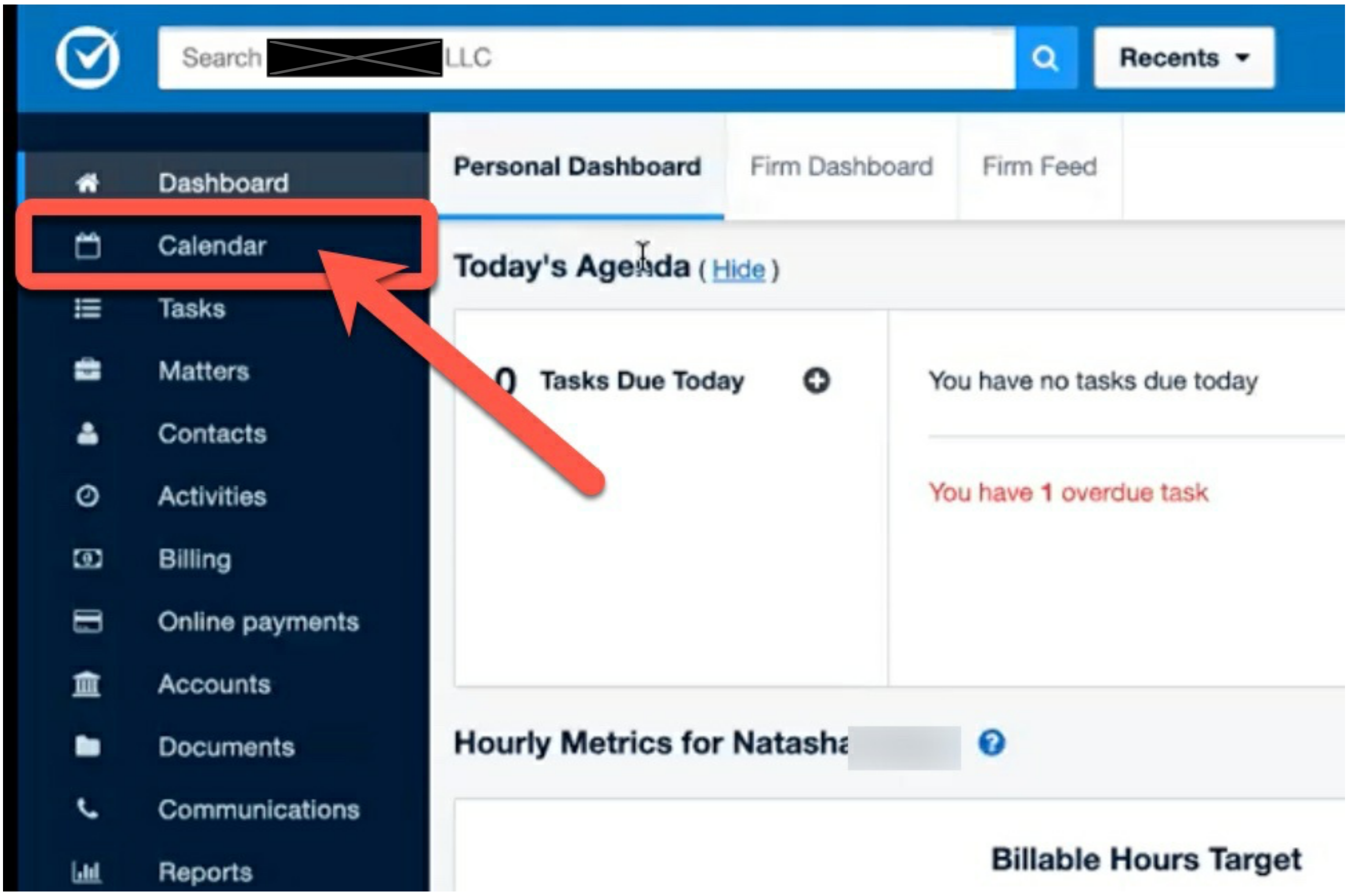
Rescheduling a PNC

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

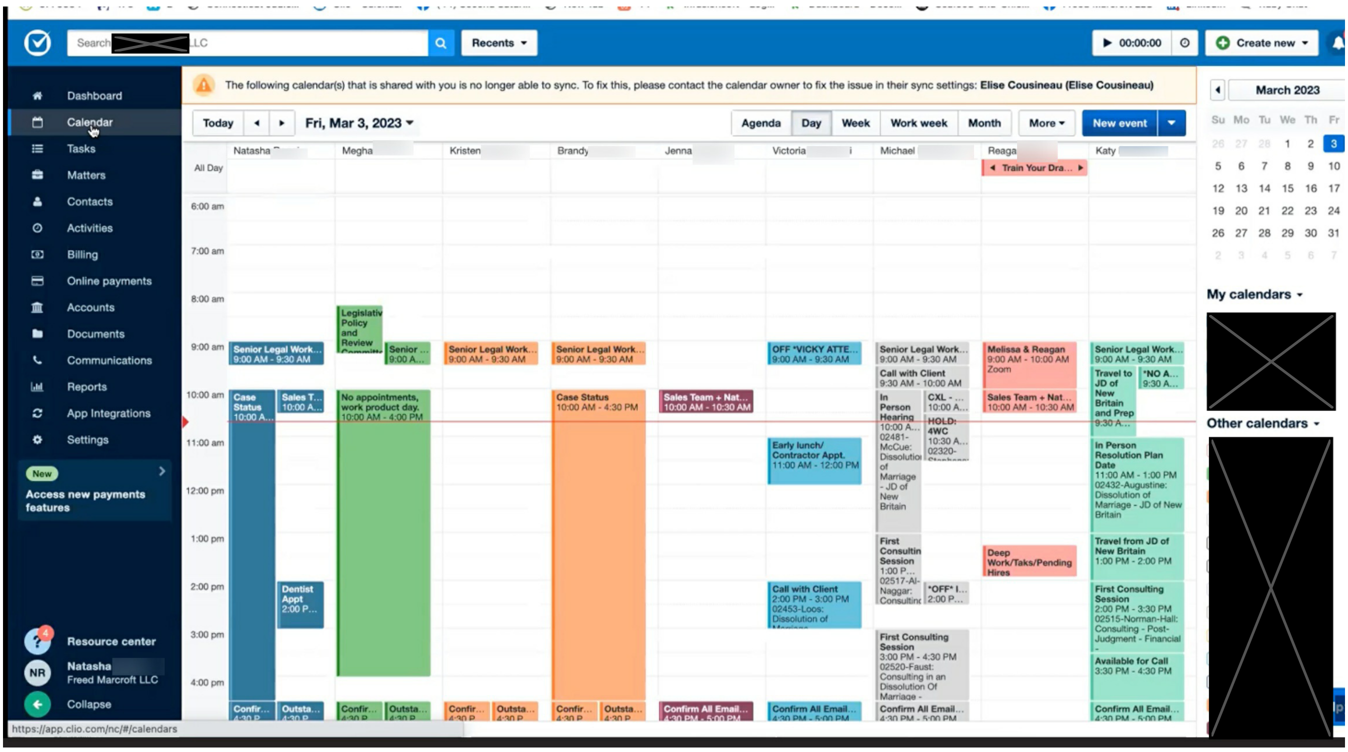
To **reschedule** a **PNC**, first, navigate to the **CLIO homepage.**



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

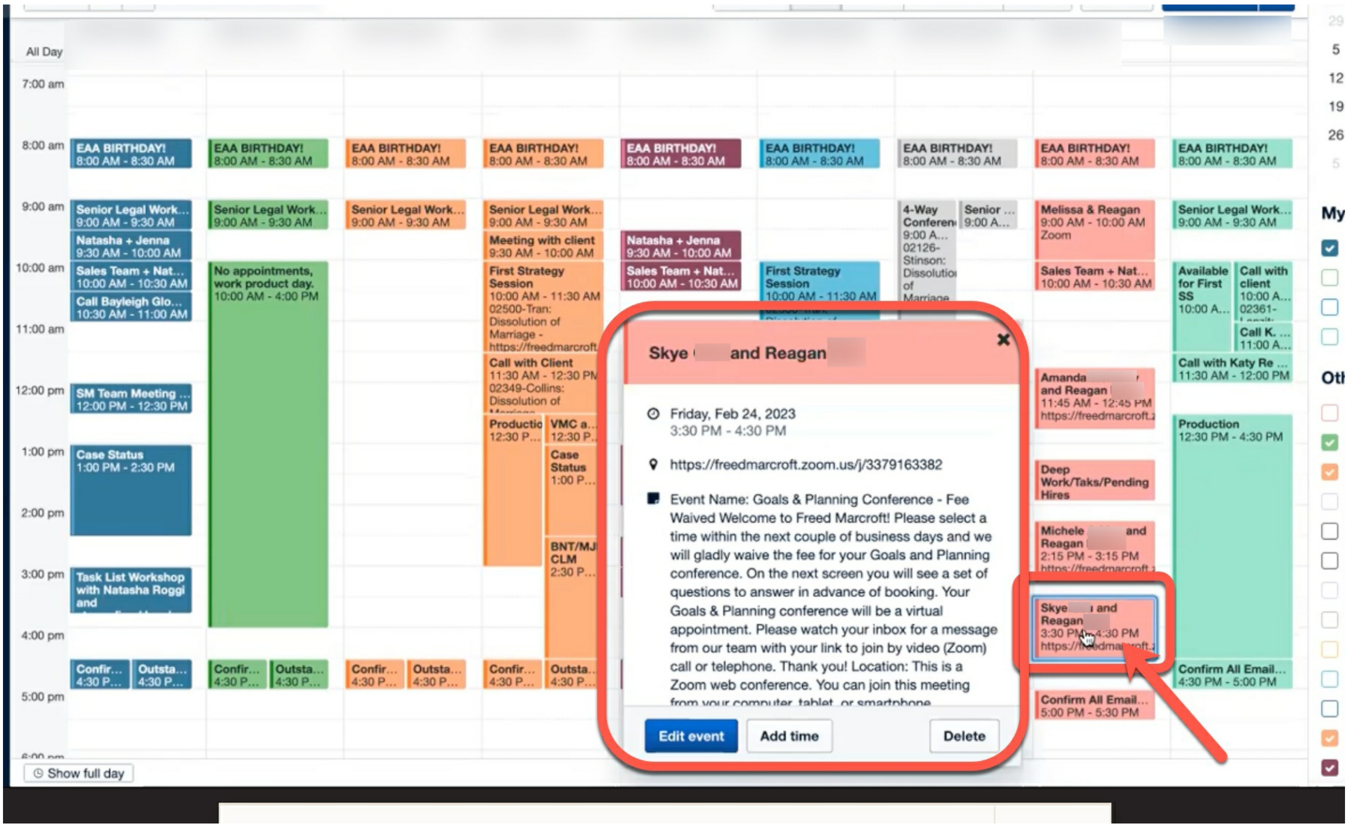


The **CLIO calendar page** will populate.

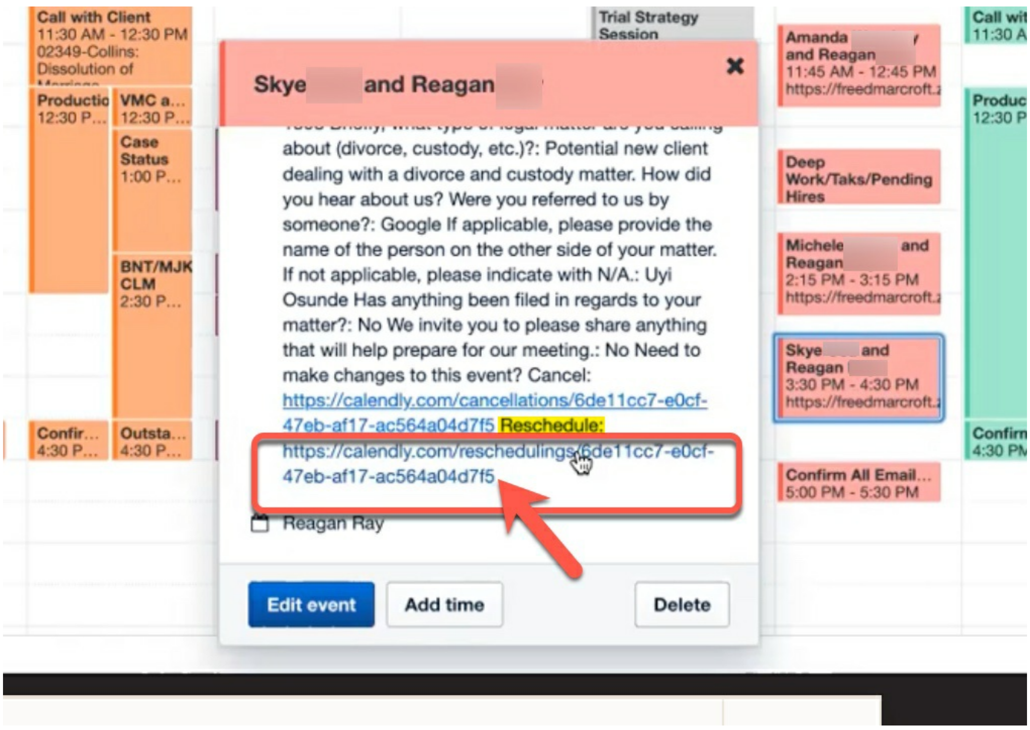


Locate and select the **Goals and Planning Conference** that needs to be **rescheduled**.

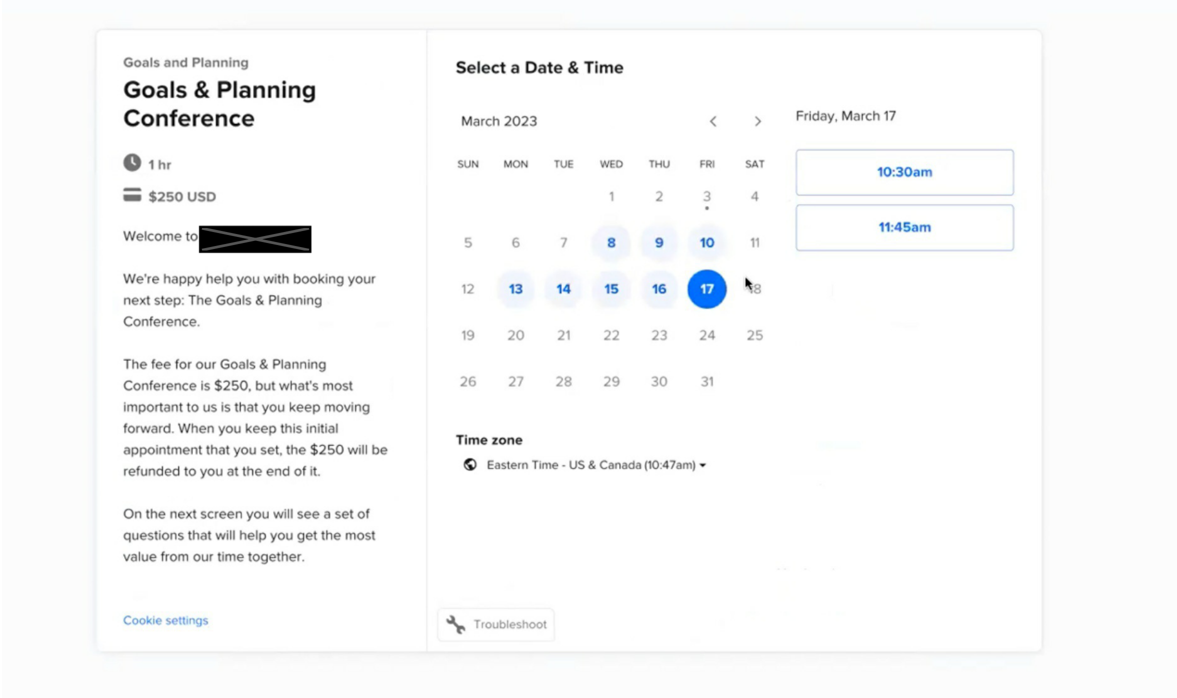
An **event description box** will populate after selection.



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



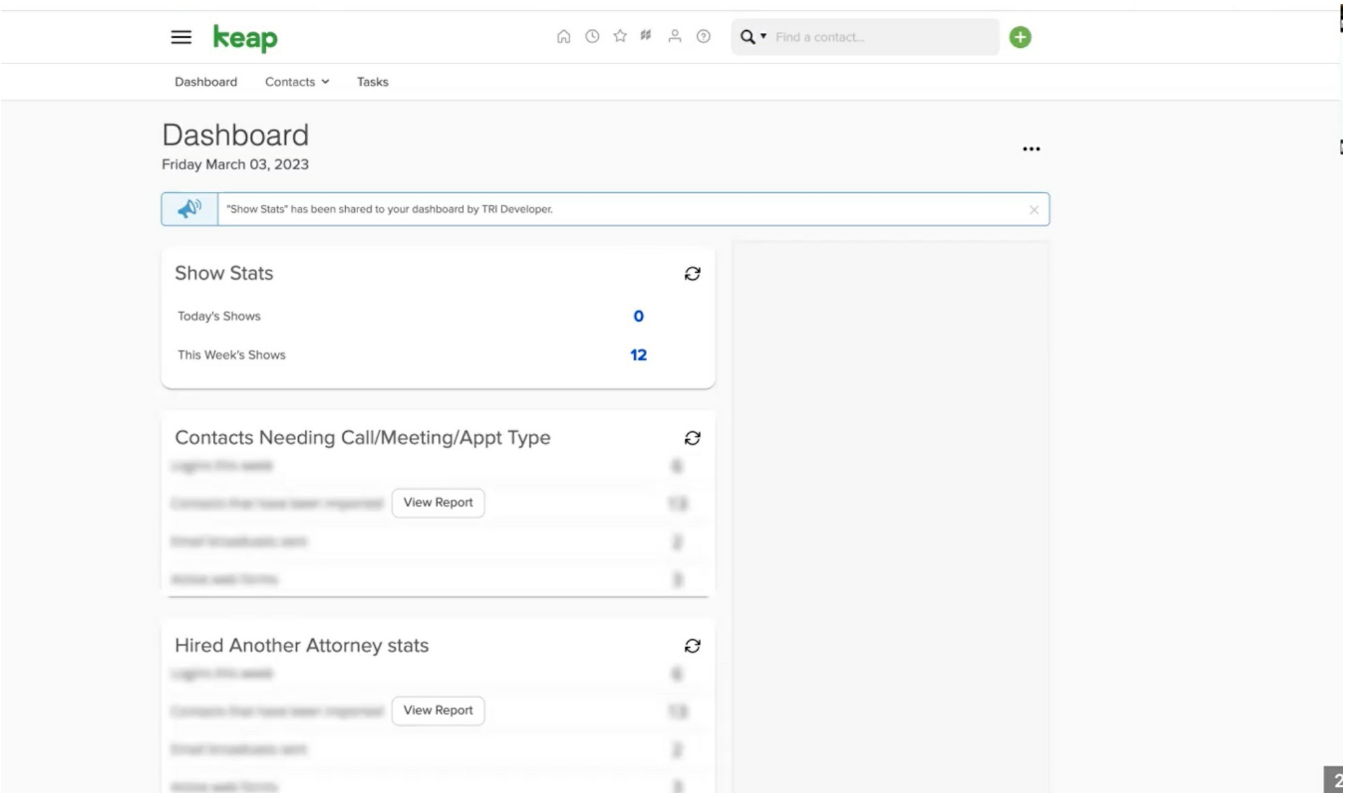
A **Calendly scheduling link** will populate.



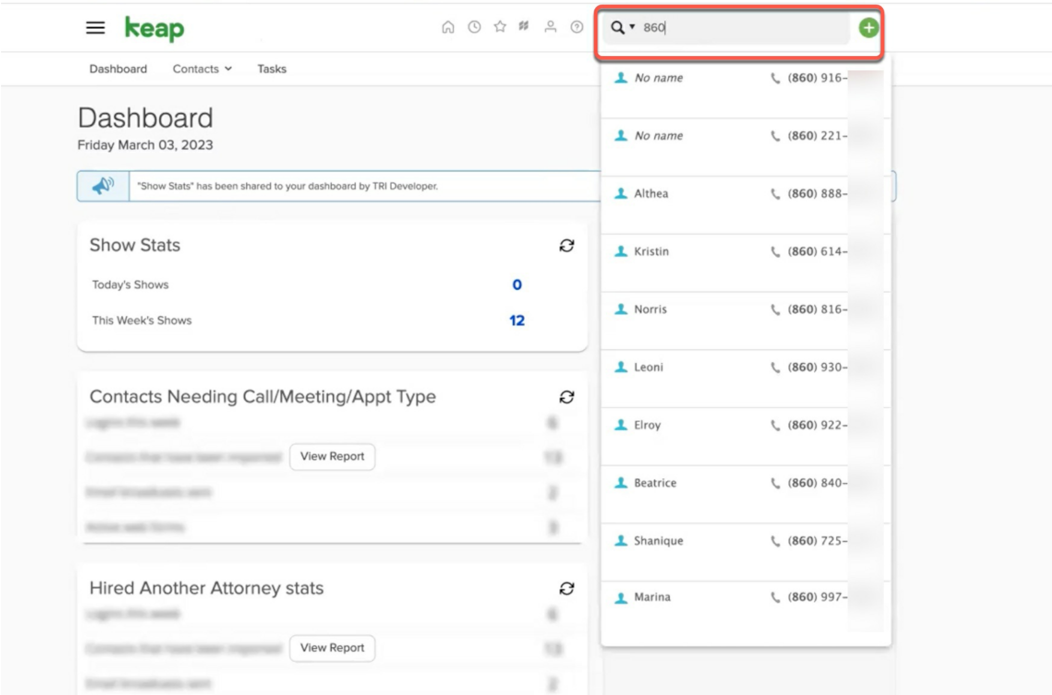
Select the **PNC's desired date** and **time** for the **rescheduled Goals and Planning Conference.**

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

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

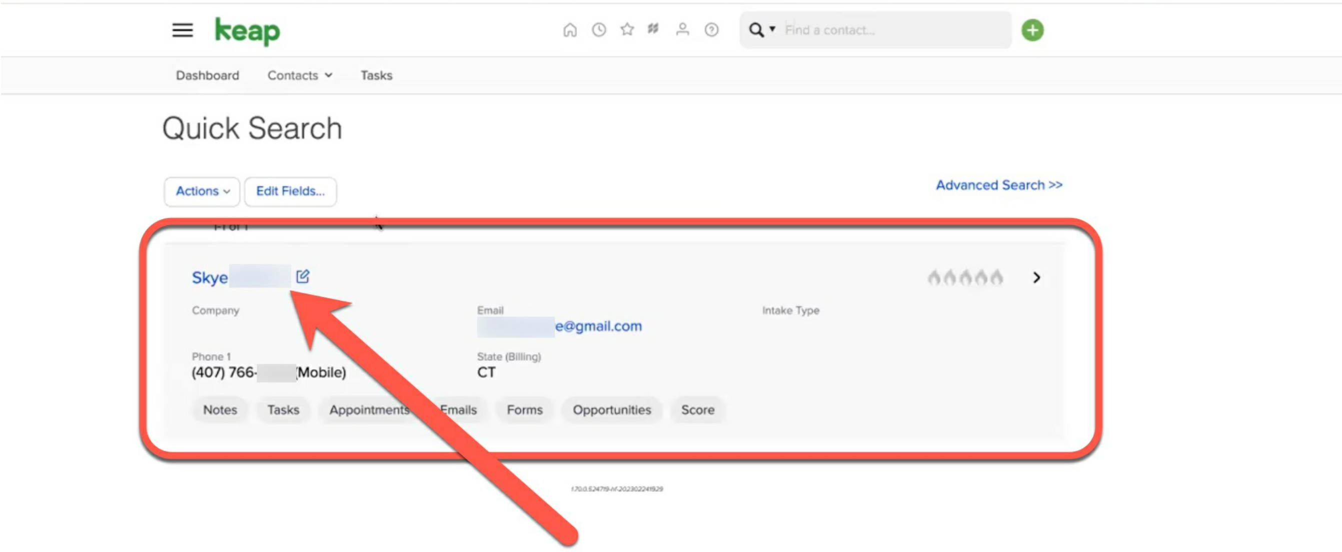


In the **search bar**, input the **PNC's phone number or name.**

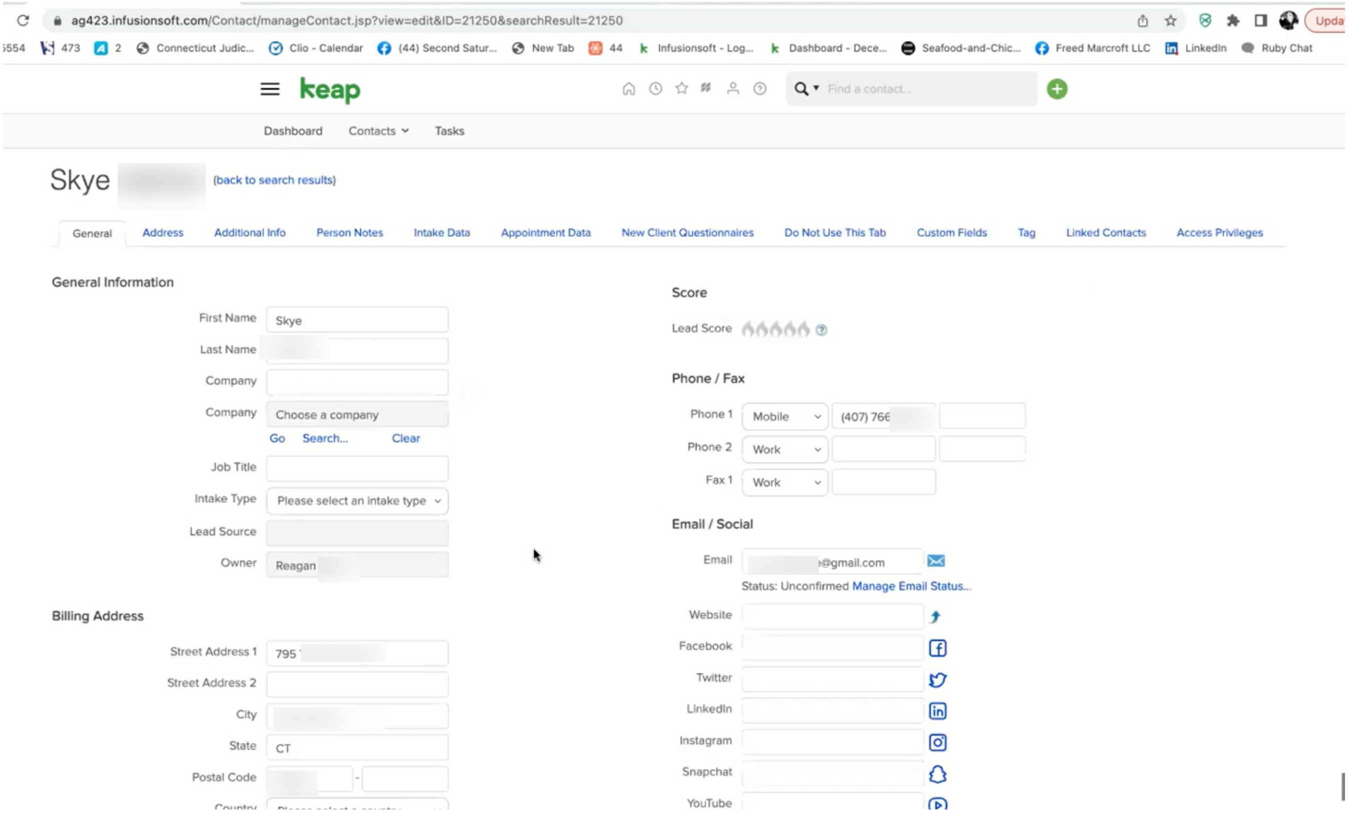


Search results will populate.

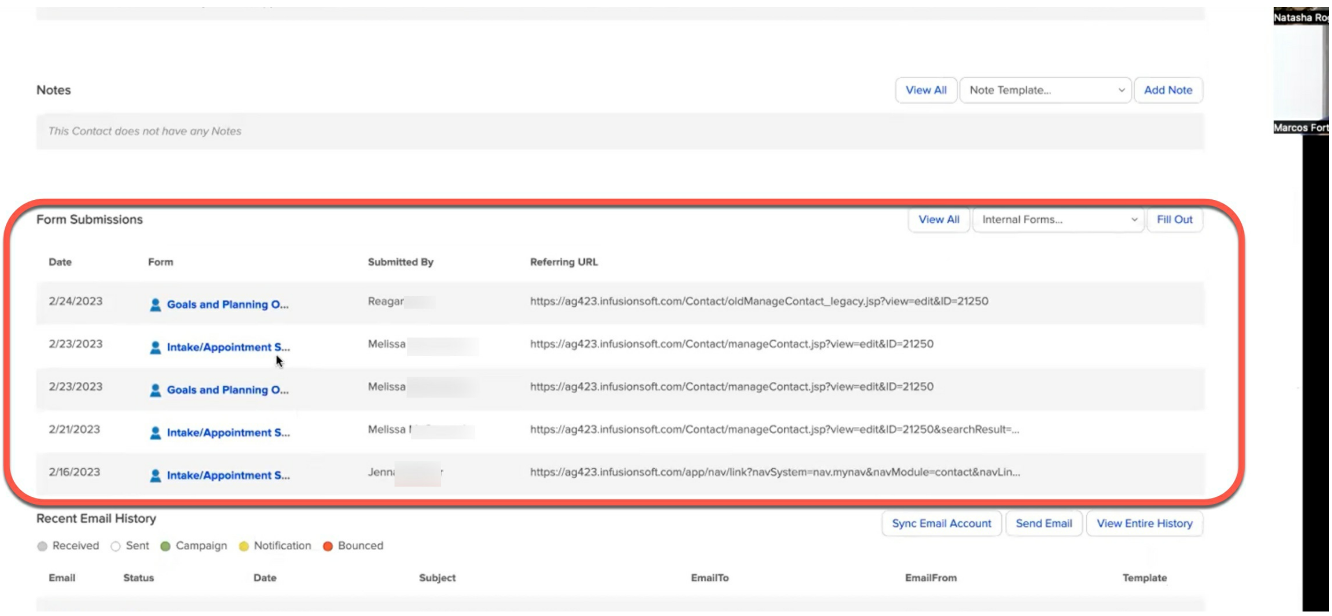
Select the desired **PNC's profile** from the search results.



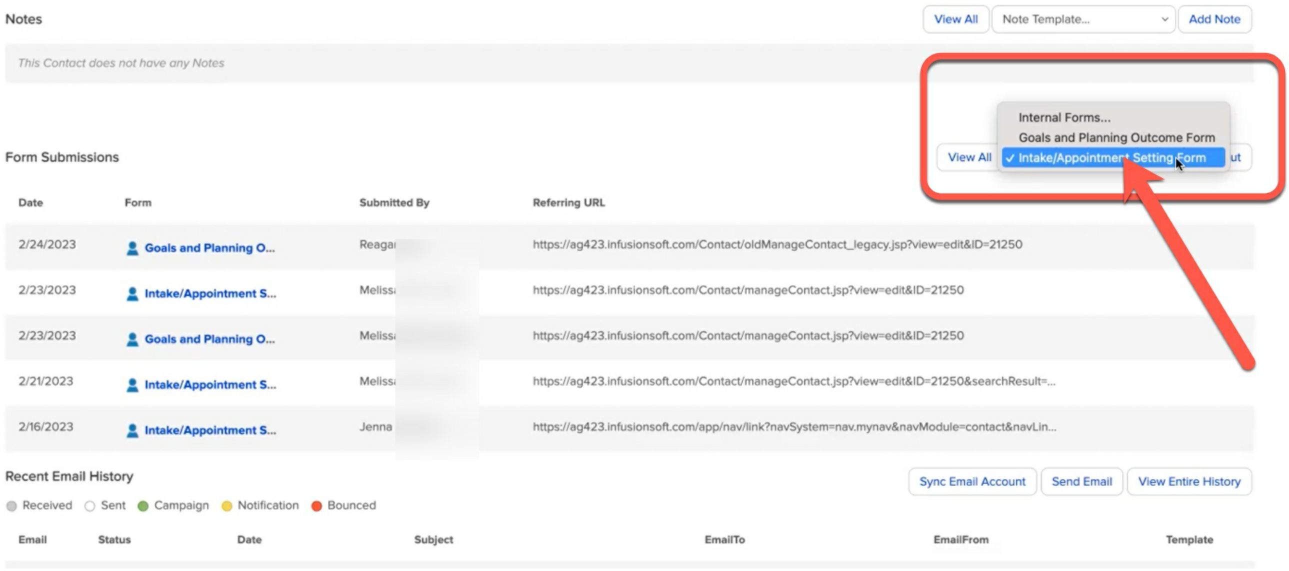
The **PNC's profile** will populate.



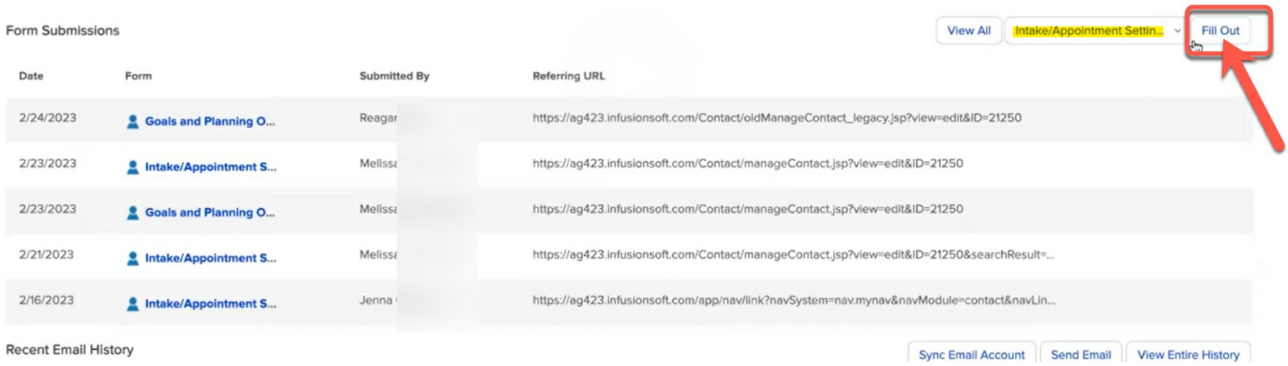
Scroll down the PNC's profile to the **"Forms and Submissions" section.**



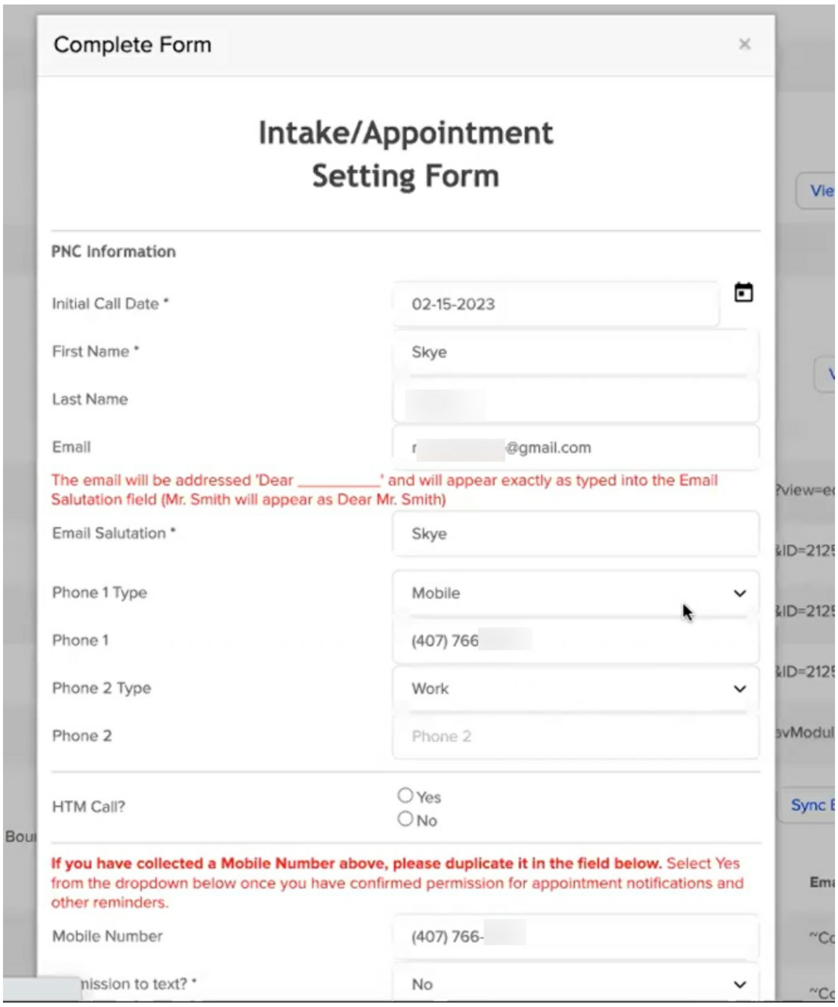
Select **"Intake/Appointment Setting Form"** from the drop-down menu at the top of this section.



Then select **"Fill Out."**

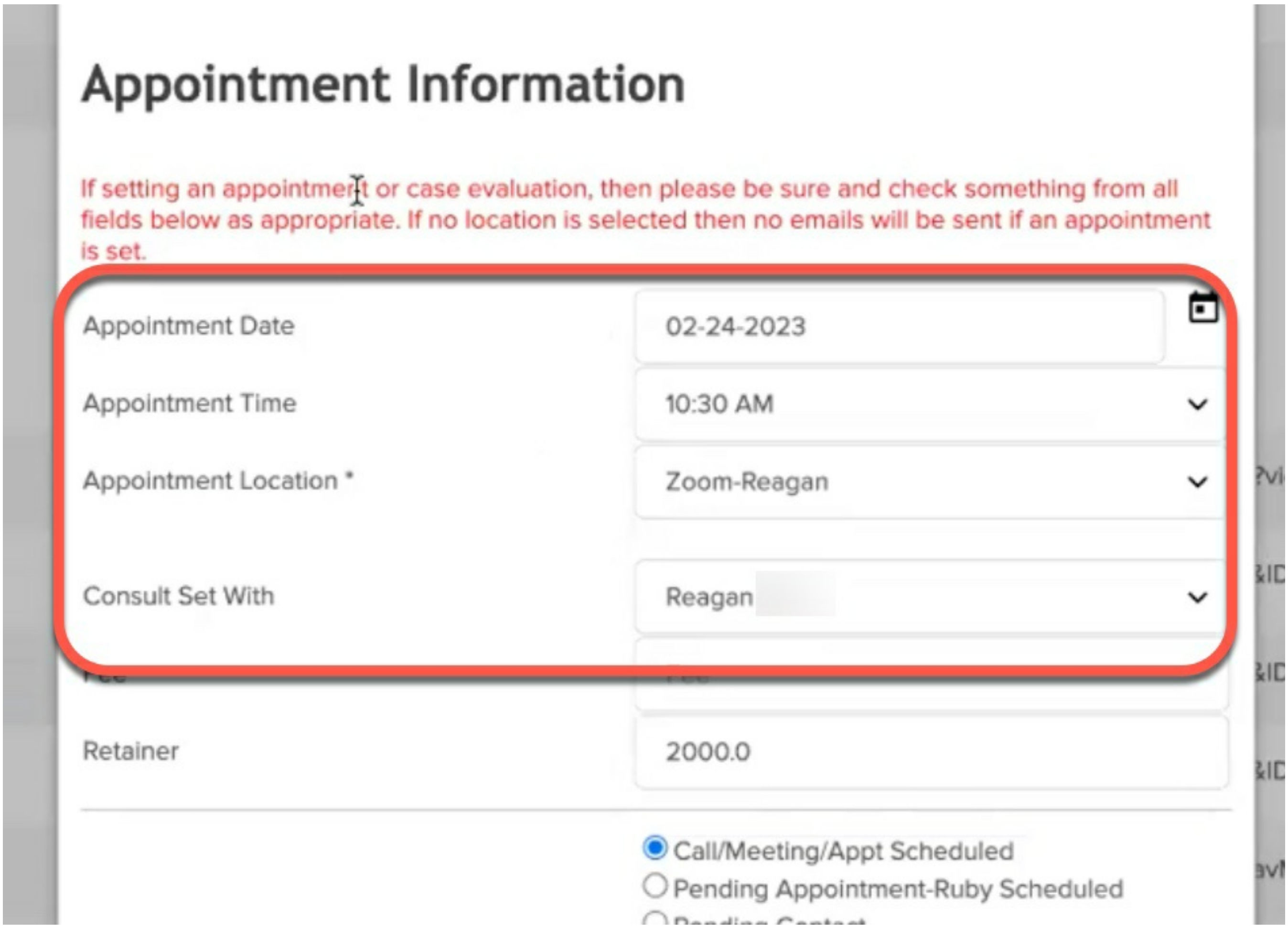


The **"Intake/Appointment Setting Form"** will appear with the general profile information already populated in the appropriate fields.

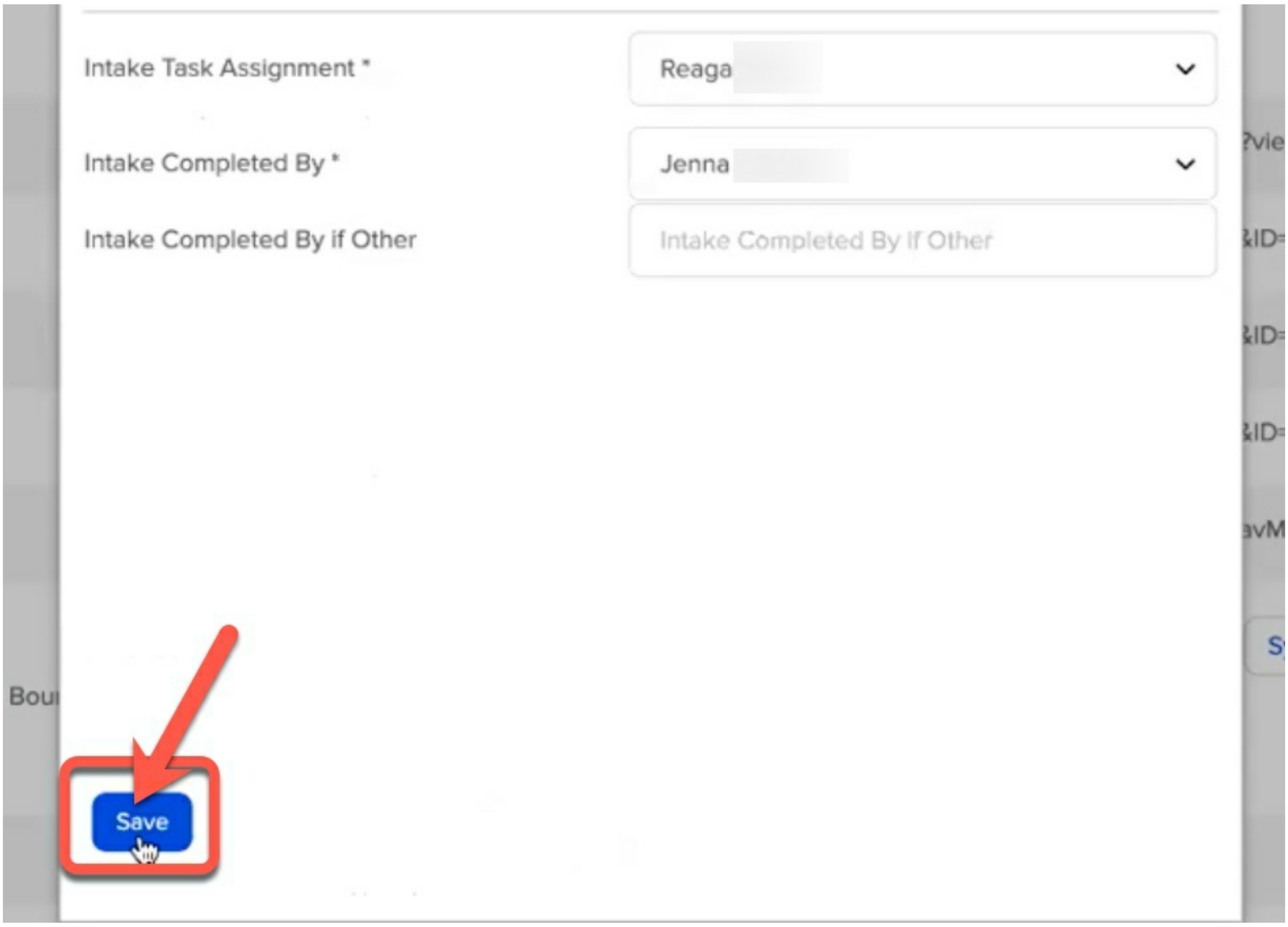


Scroll down to the **"Appoint Information" section** and edit the following information to **reflect** the **rescheduled Goals and Planning Conference:**

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



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

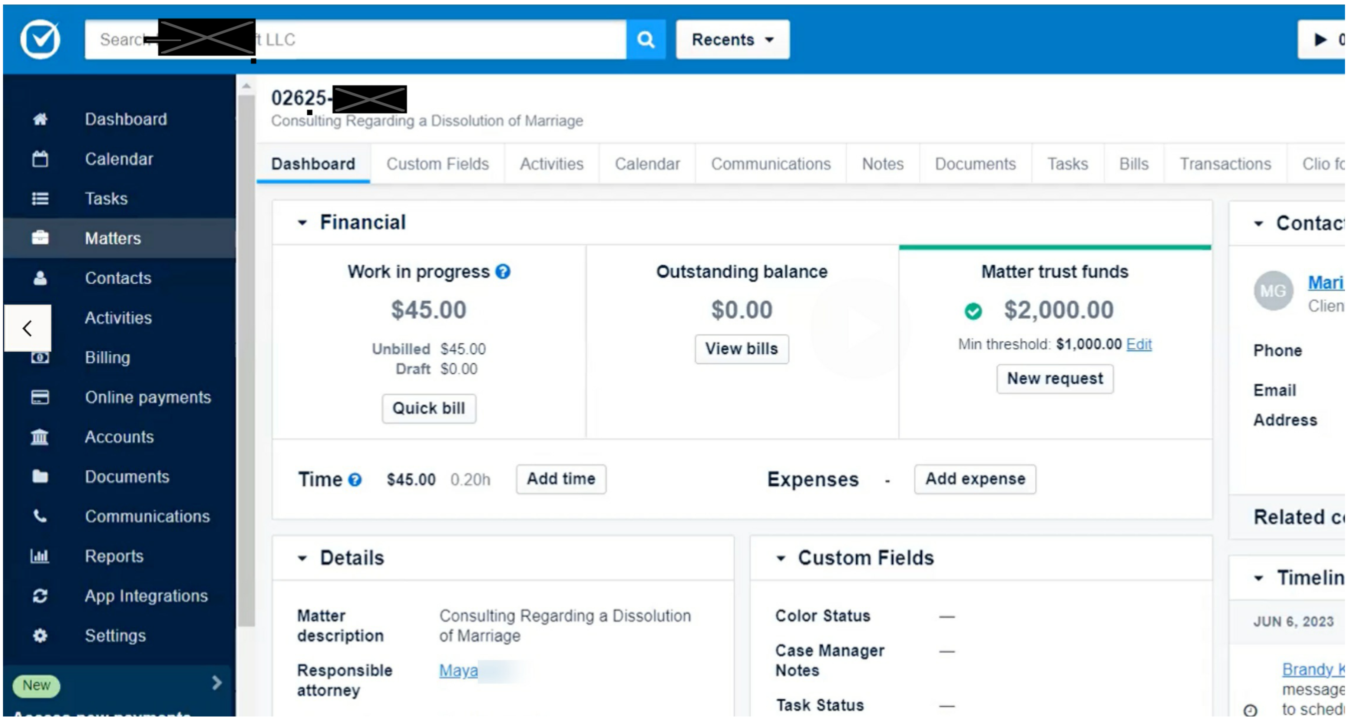


The **new "Intake/Appointment Setting Form"** will **appear** in **Rainmaker** and **trigger preliminary actions** for the upcoming appointment.

Synching CLIO with Case Status

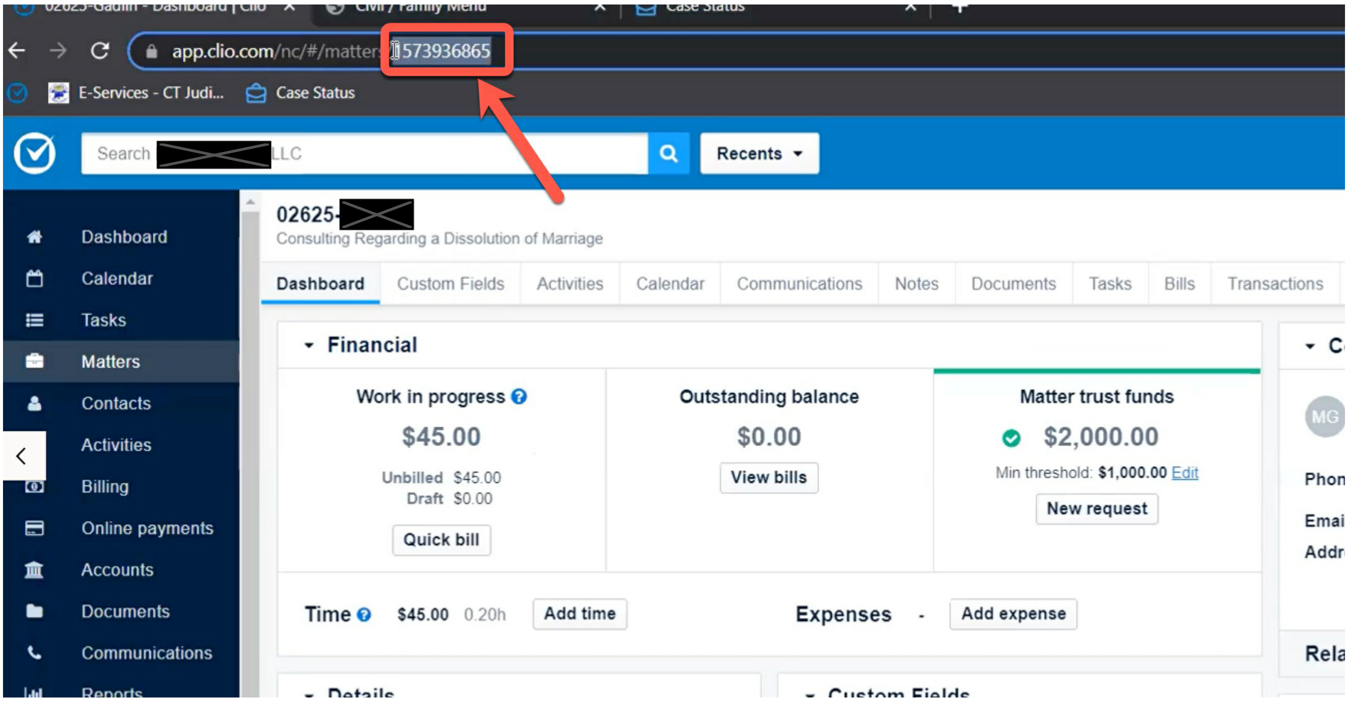
Case Status and **CLIO** need to be **synched** for **clients** and **personnel** to be able to access and **communicate** about the case in Case Status.

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

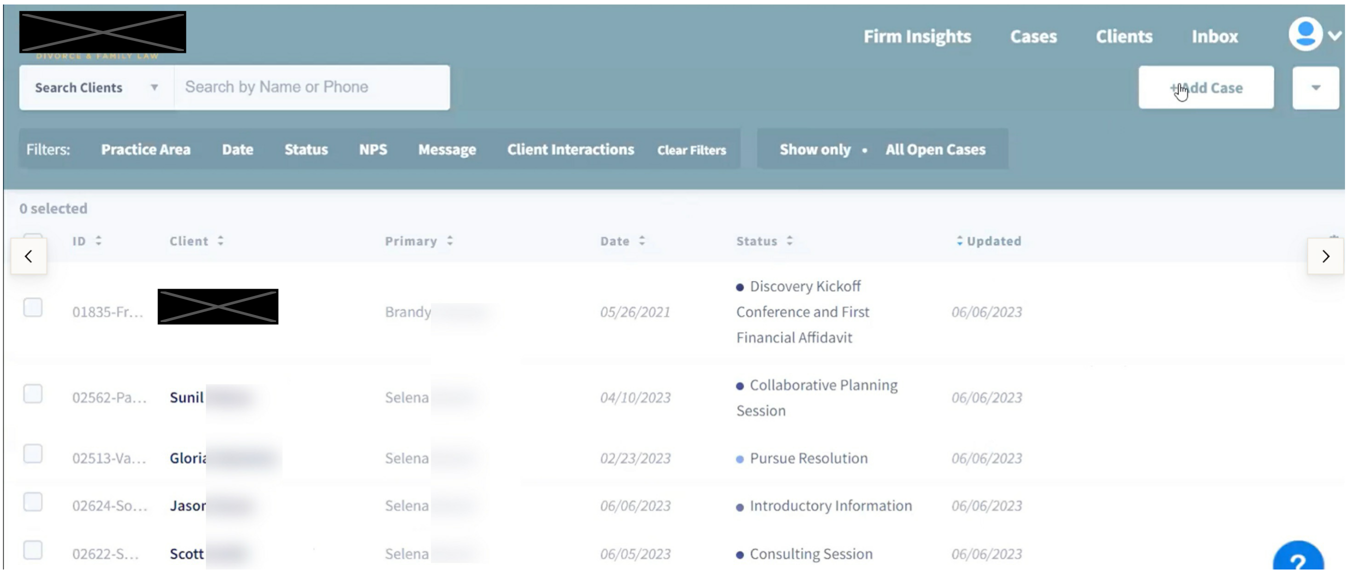


Locate and **copy** the **CLIO reference identification number**.

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



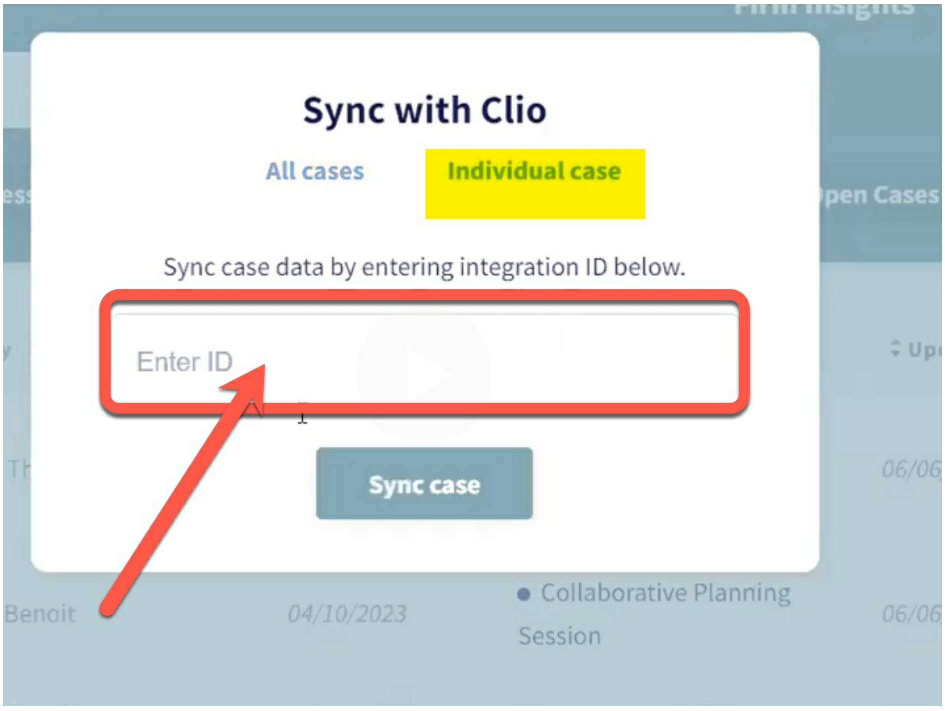
Now, navigate to the **Case Status Home page.**



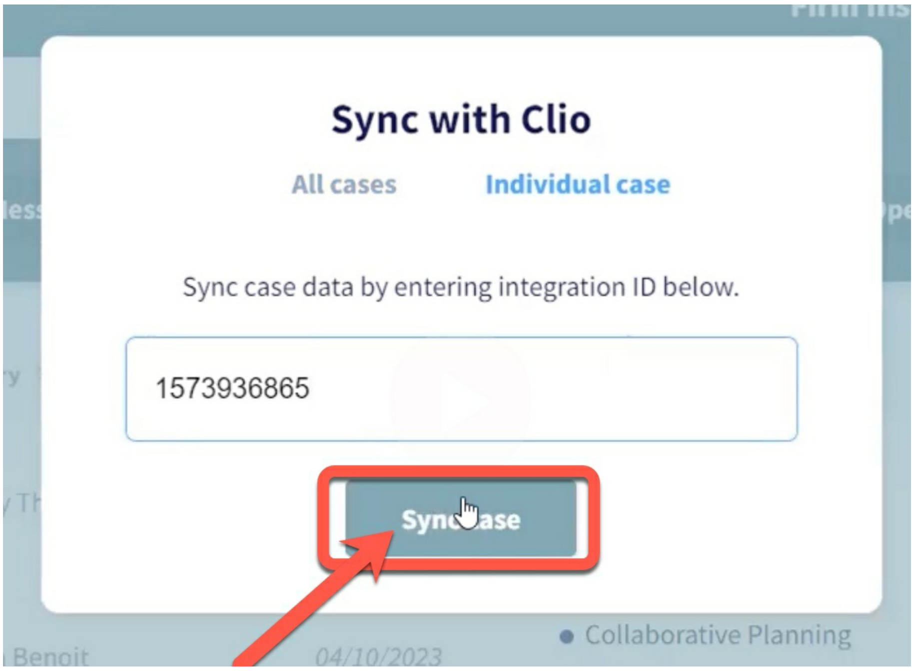
Select the **down arrow icon** from the top right corner, then select **"Sync with CLIO."**

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

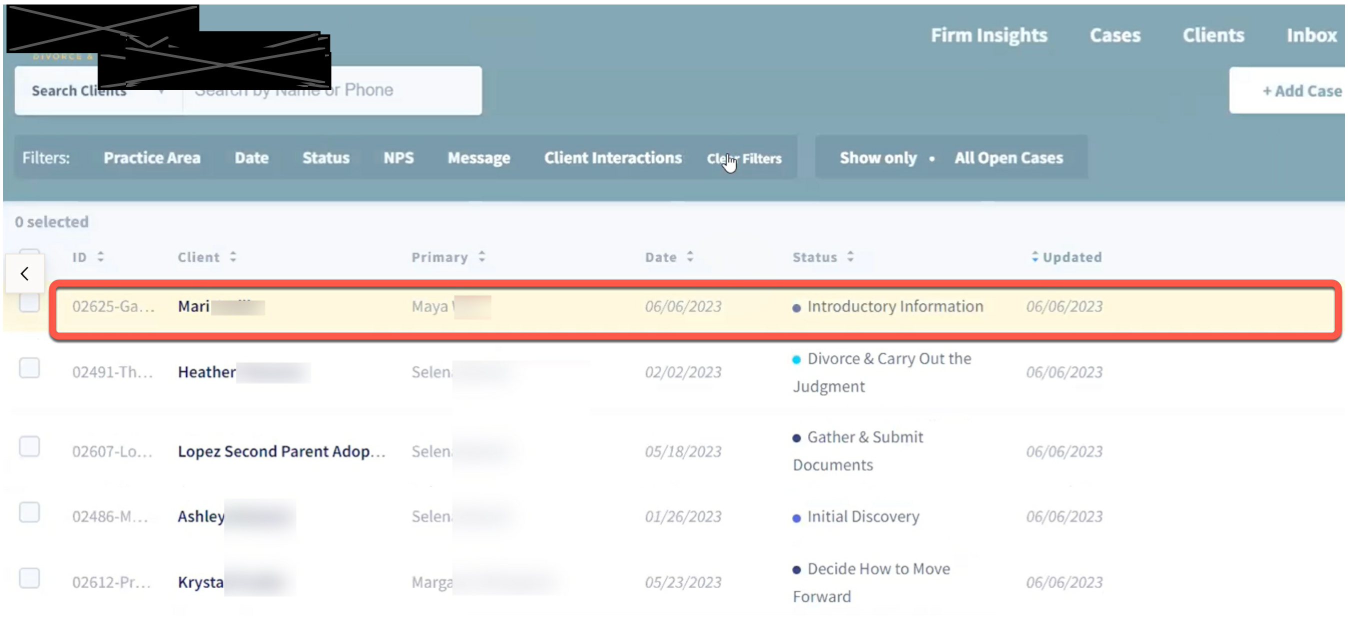
Select the **"Individual Case" tab** and **paste** the **copied CLIO reference identification number** in the **"Enter ID" field.**



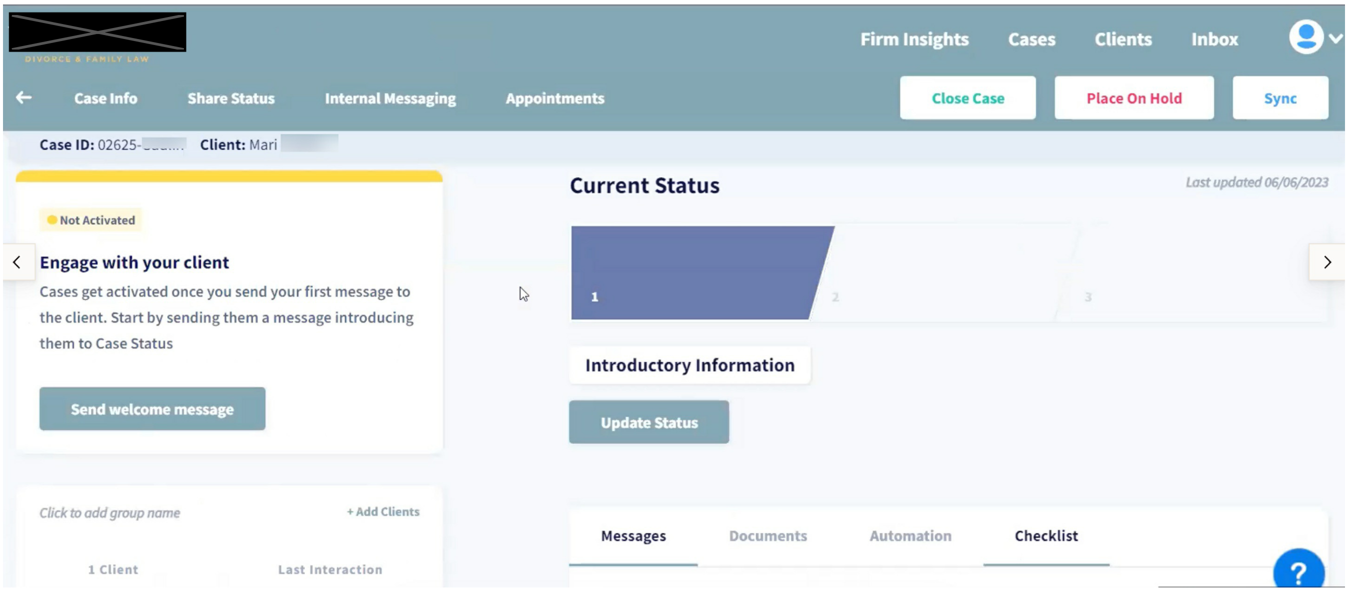
Then select **"Sync Case."**



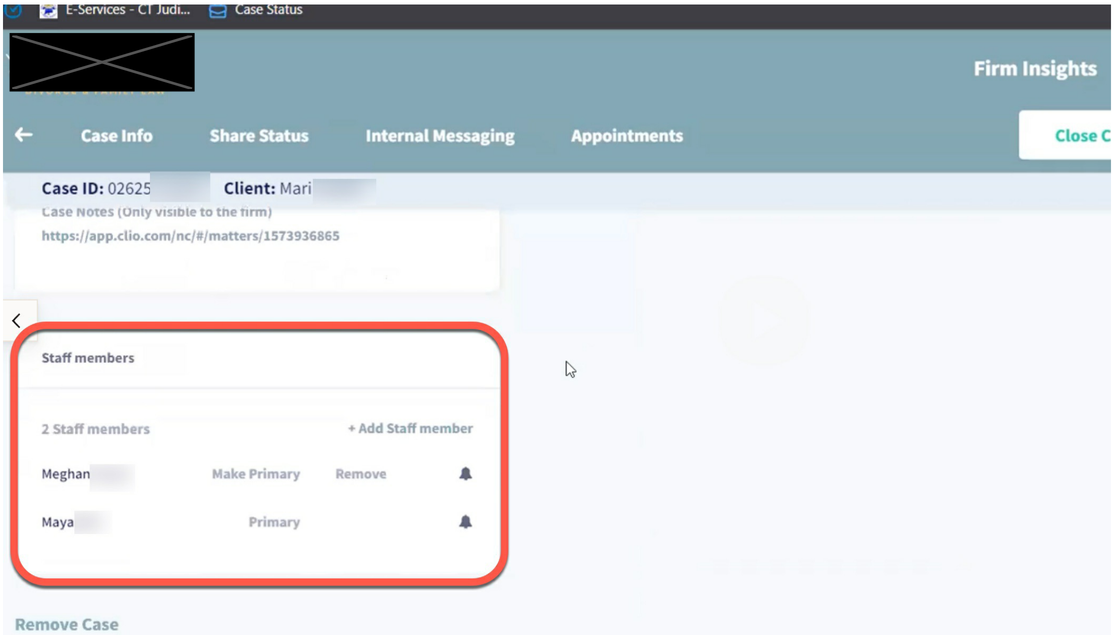
The **CLIO file** will **synch** with **Case Status** and appear in the case list on the homepage, **highlighted** in **yellow** to indicate that it is a new entry.



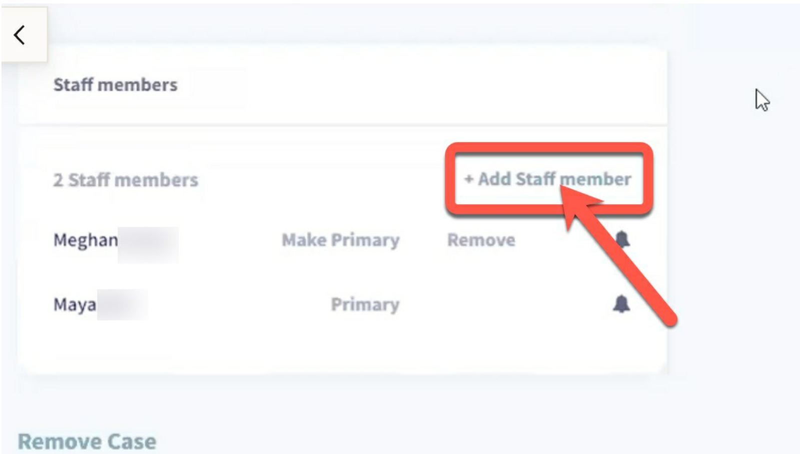
Double-click the case to **open** the **client/case page.**



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



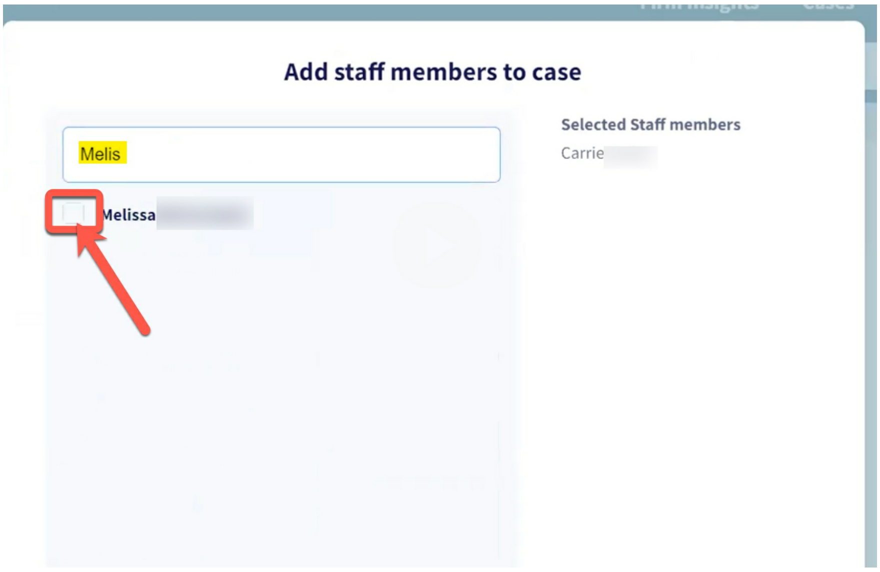
Select **"Add Staff Member**" to make any needed **personnel additions** to the profile.



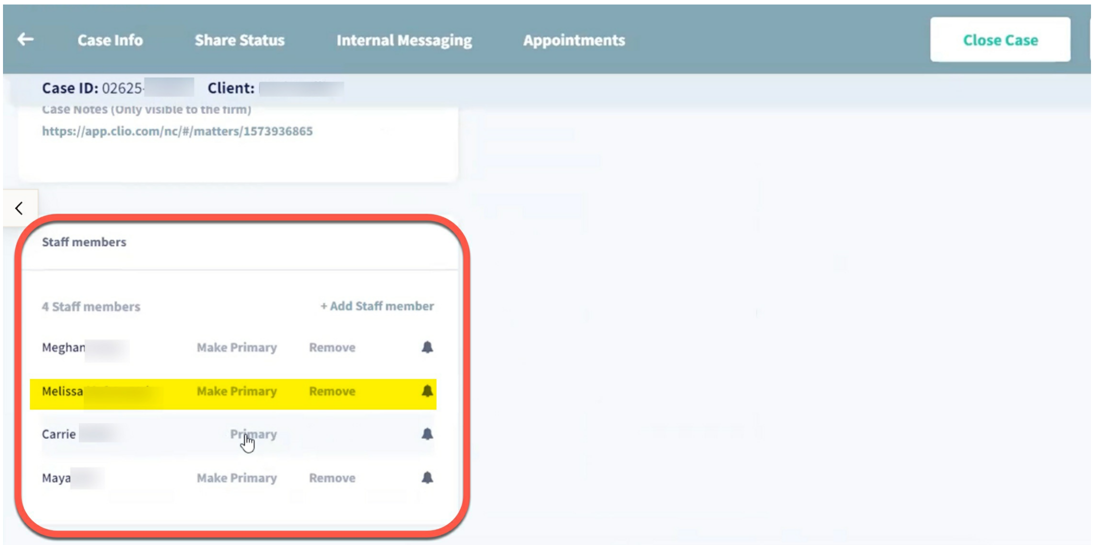
The **"Add Staff Members to Case" box** will populate.

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

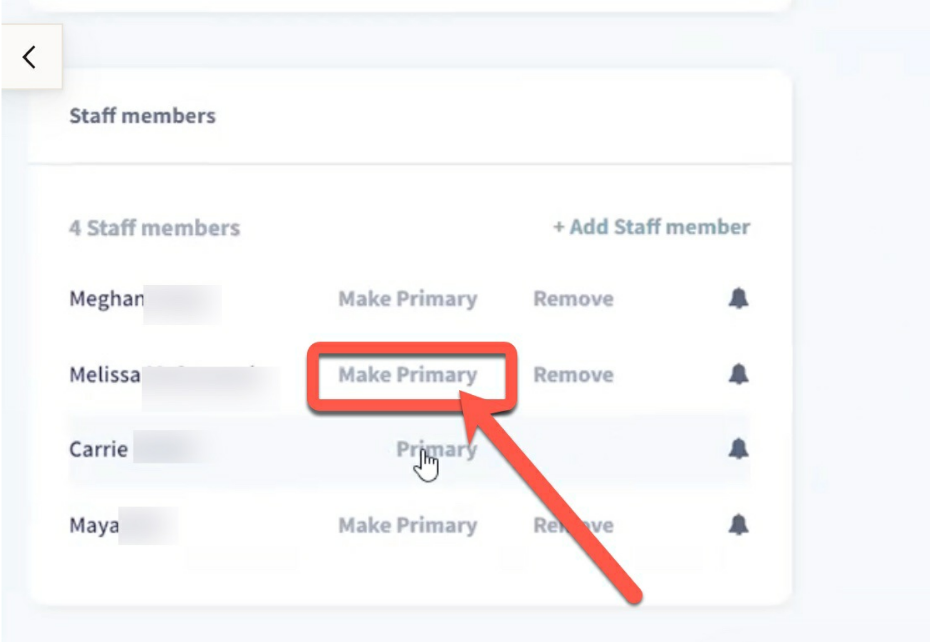
Important Note: If unsure what personnel is responsible for the case, refer to the CLIO profile.



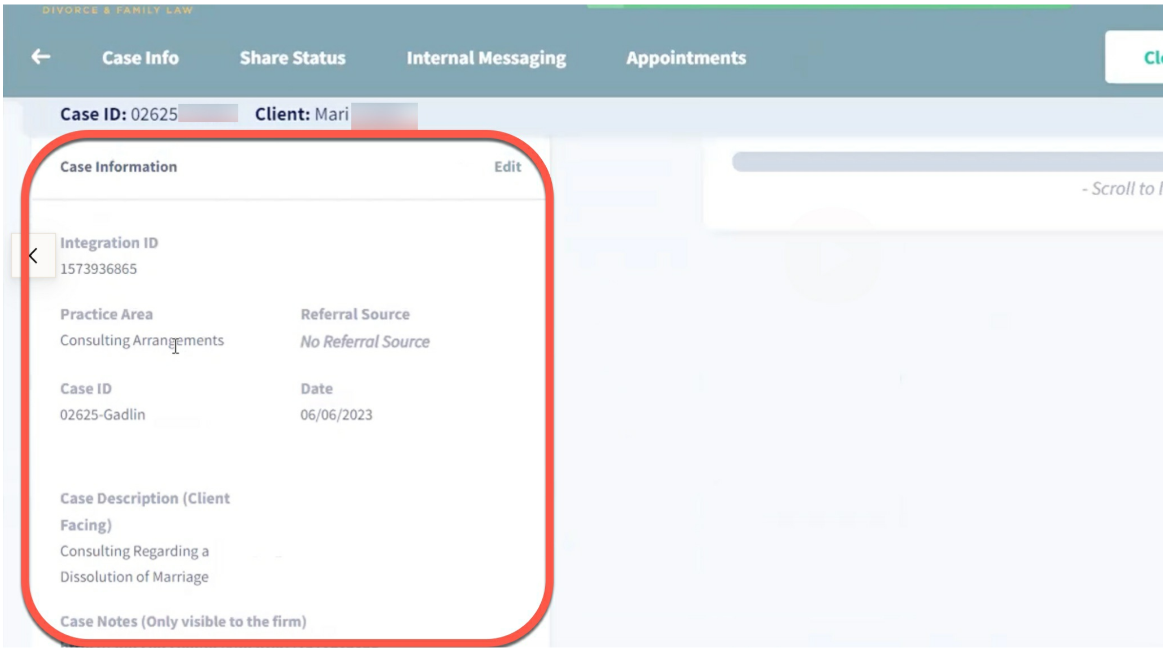
The added personnel will now appear in the **"Staff Members" section.**



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 **synched** with **Case Status!**

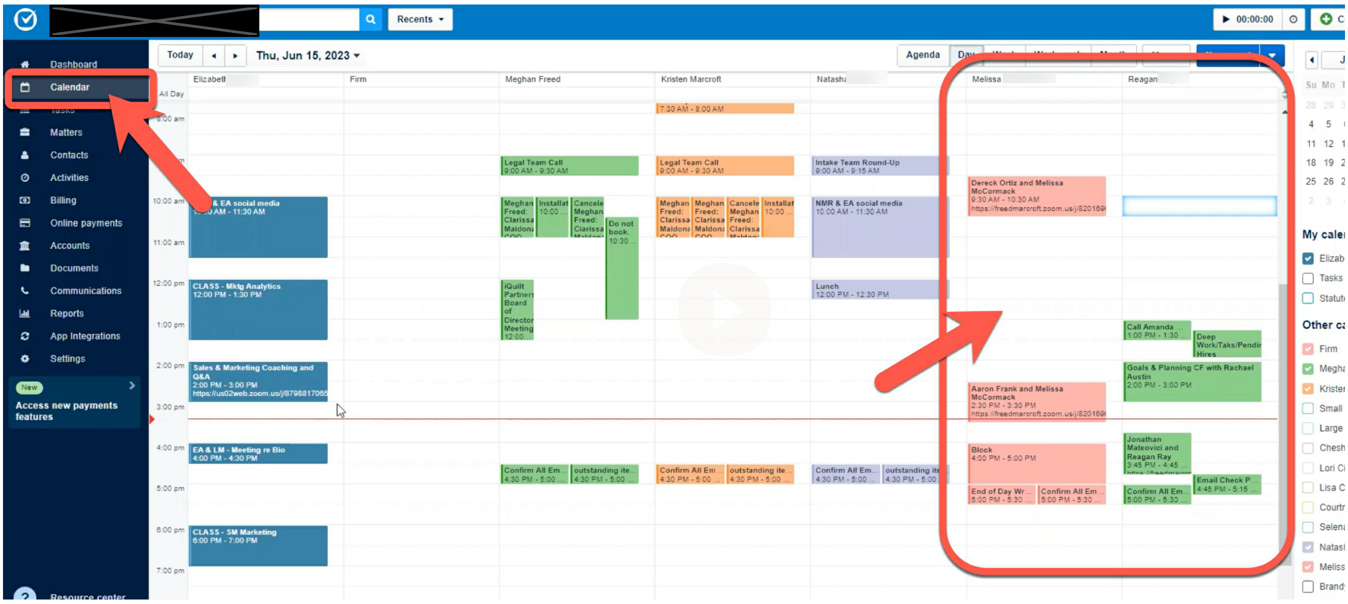
Manually Scheduling a G&P in Clio

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

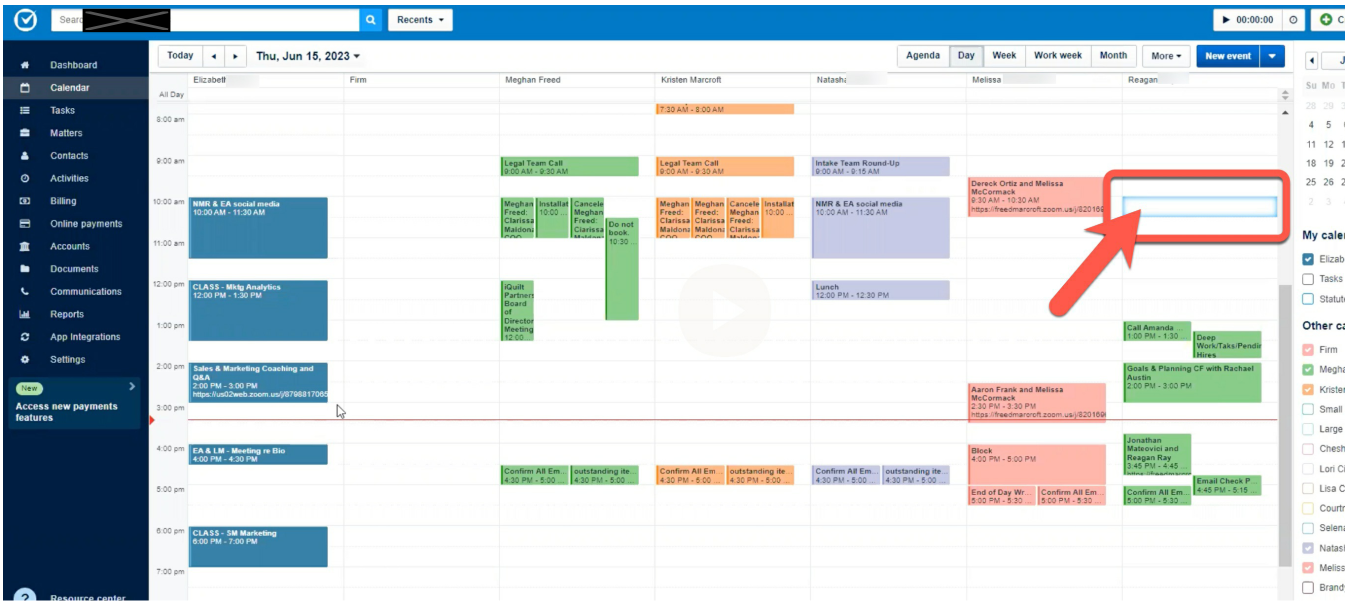
In many of these cases, the **client** will **need immediate help**.

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

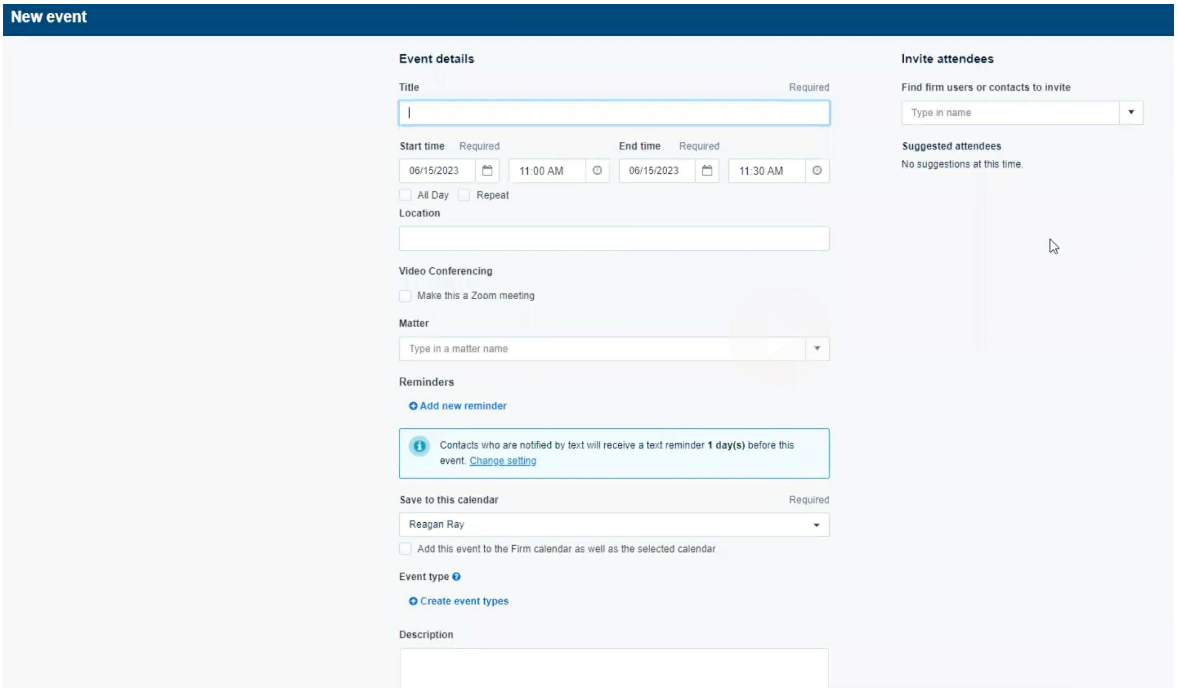
First, navigate to the **CLIO "Calendar" tab** and **locate** the **Sales Representatives' Calendars**.



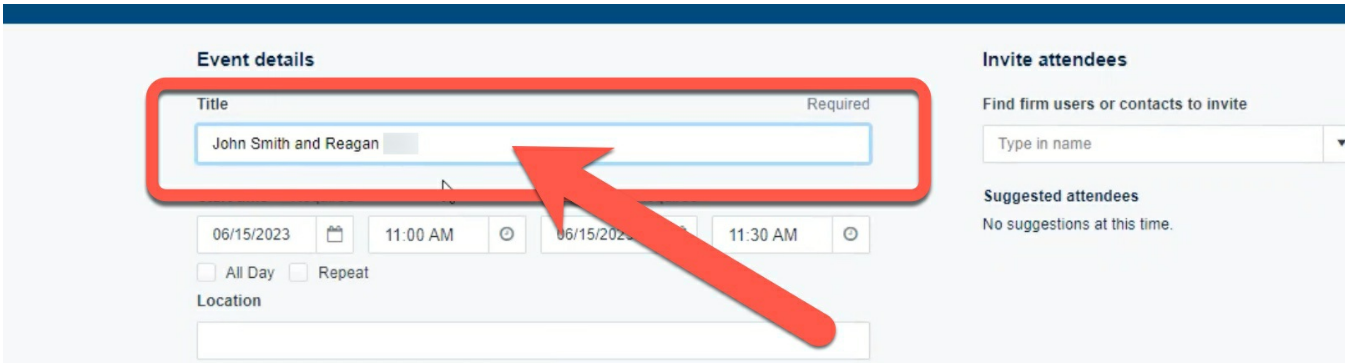
Then, **double-click** on the **desired available time slot.**



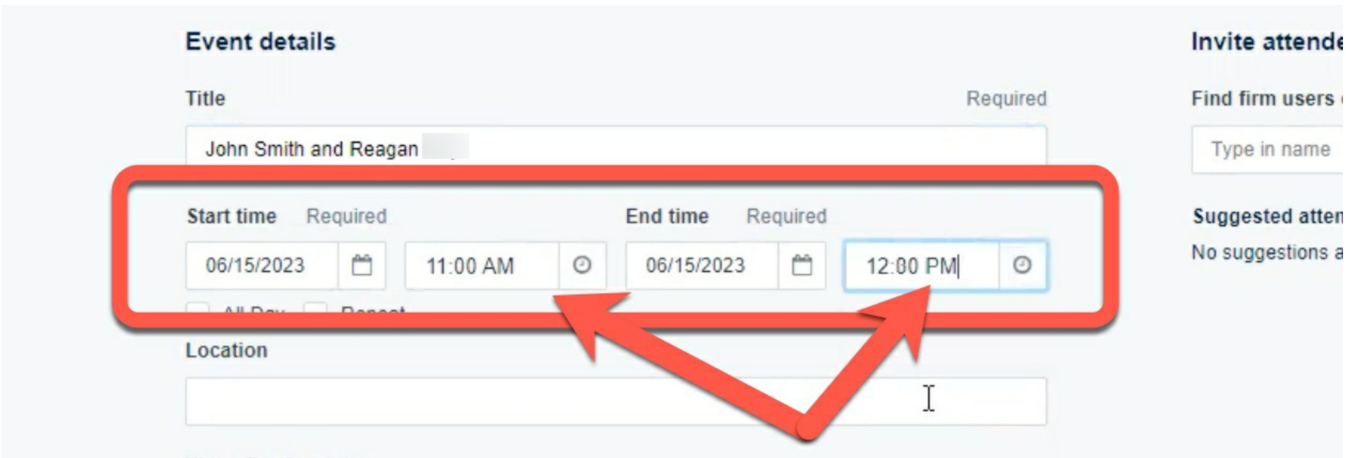
The **"Event Details"** box will populate.



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



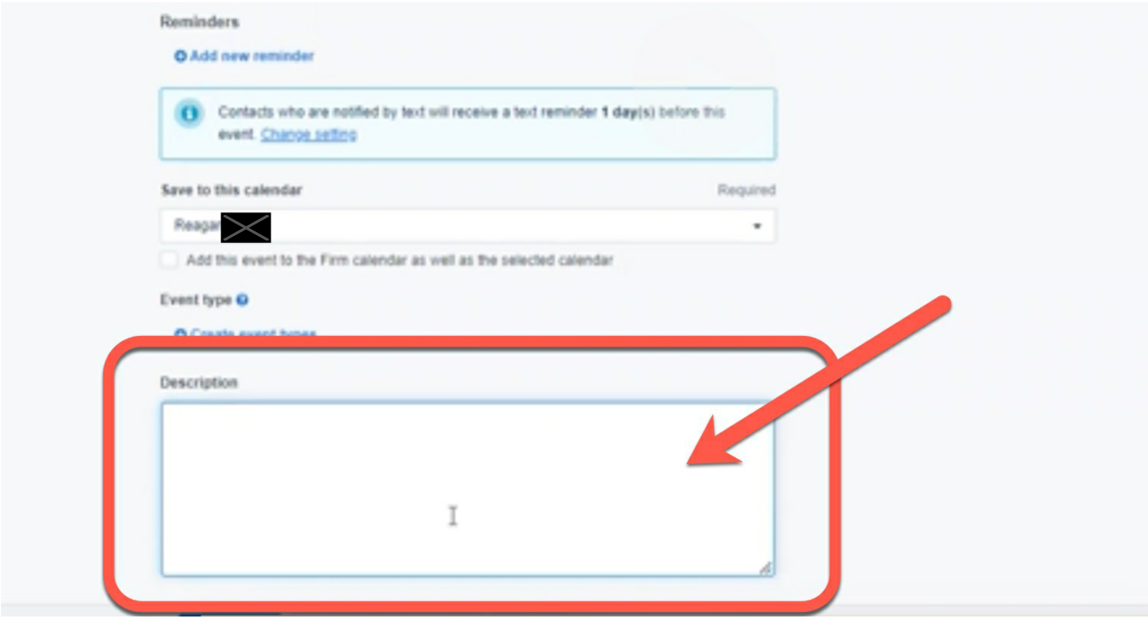
Next, **edit** the **meeting time selections** to **reflect a 1-hour meeting.**



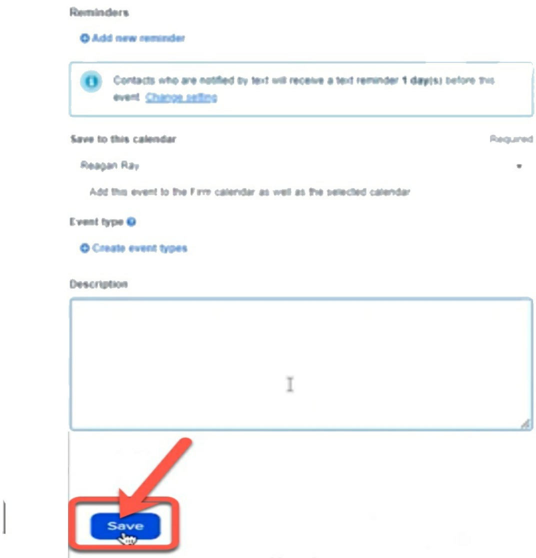
Then, scroll down the **"Description" field** and enter in:

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

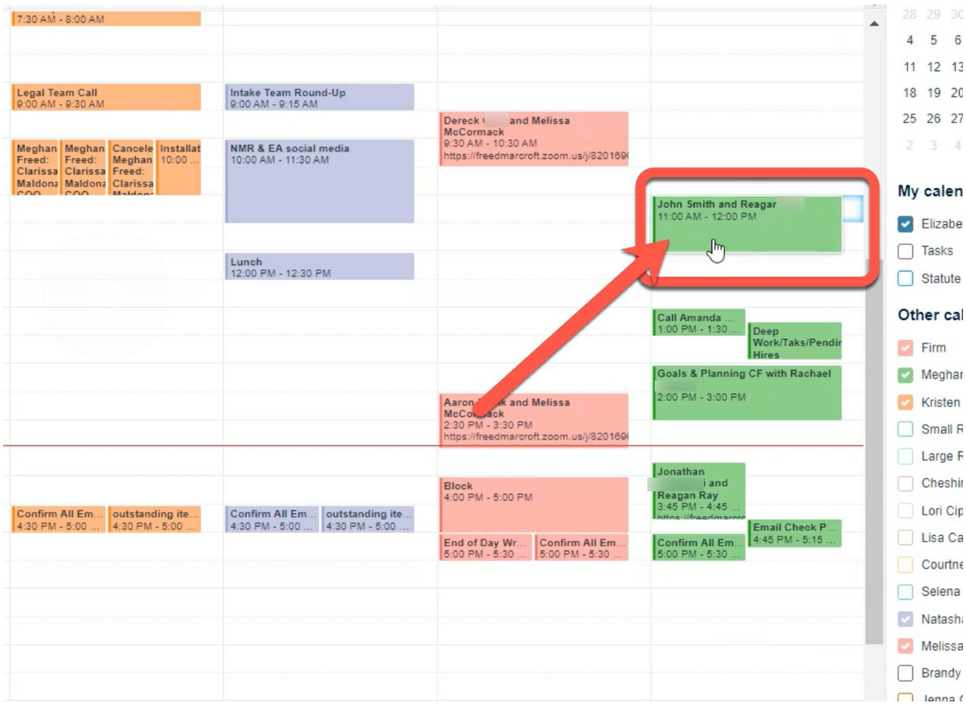
- **The Goals and Planning Session link for the sales team member.**



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



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


7:30 AM - 8:00 AM
Legal Team Call
9:00 AM - 9:30 AM
Intake Team Round-Up
9:00 AM - 9:15 AM
and Melissa
McCormack
9:30 AM - 10:30 AM
NMR & EA social media
10:00 AM - 11:30 AM
John Smith and Reagar
11:00 AM - 12:00 PM
Lunch
12:00 PM - 12:30 PM
Call Amanda
Goals & Planning CF with Rachael
2:00 PM - 3:00 PM
2:30 PM - 3:30 PM
Block
4:00 PM - 5:00 PM
Reagan Ray
Confirm All Em...
outstanding ite...
End of Day Wr...
Email Check P...
My calen
Tasks
Other cal
Firm
Kristen
Selena
Melissa
Brandy

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.

[redacted]

DIVORCE & FAMILY LAW

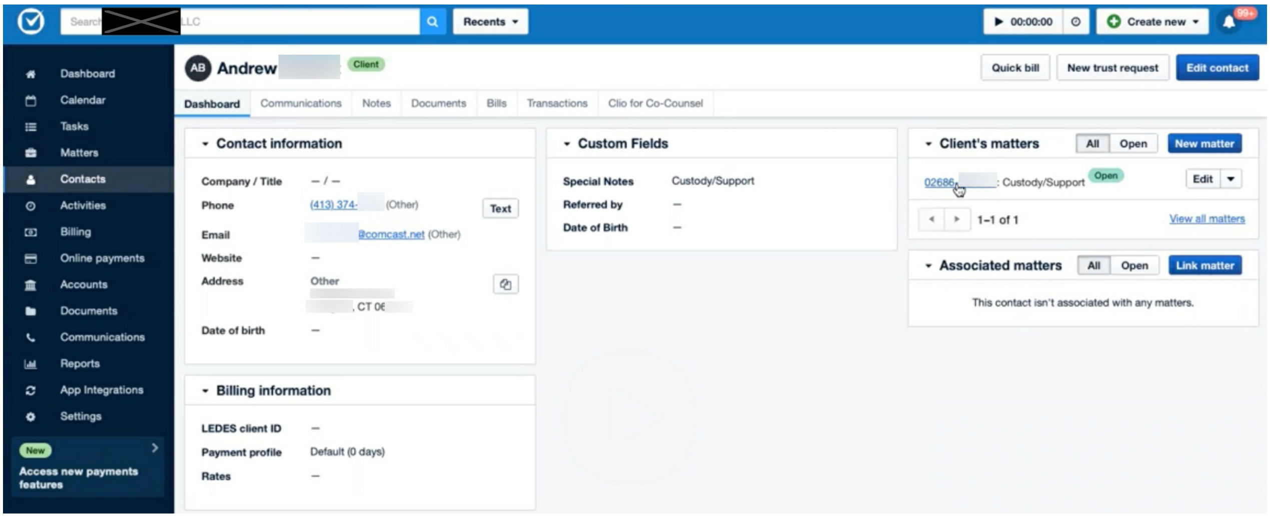
Opening a New Matter in CLIO
Checklist

- [ ] 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

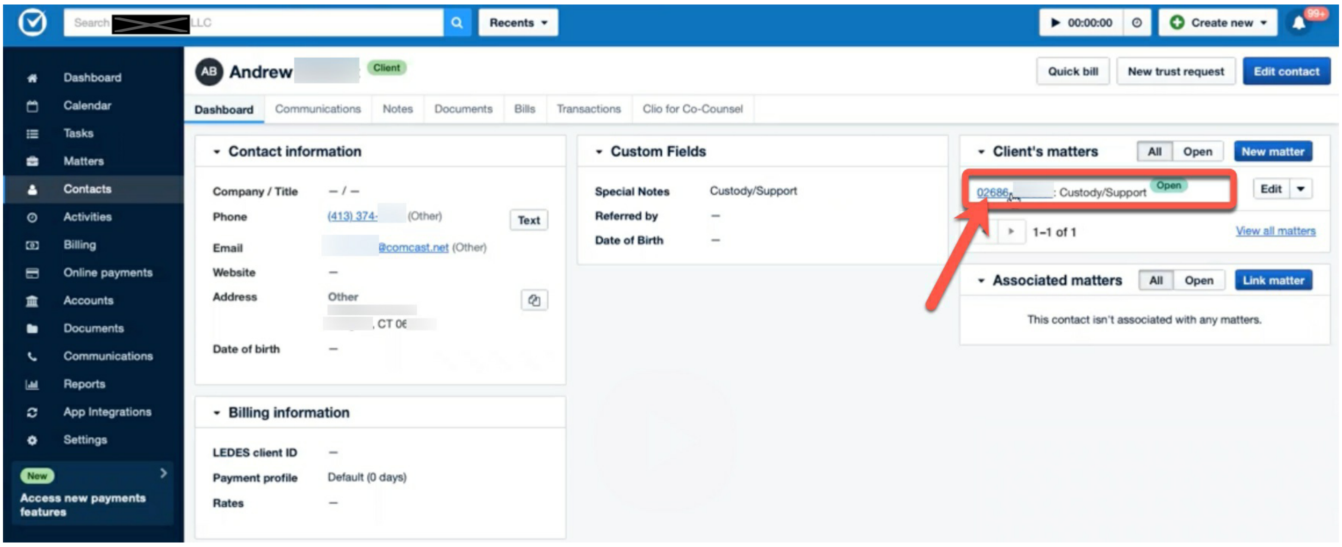
Editing the Matter in CLIO

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

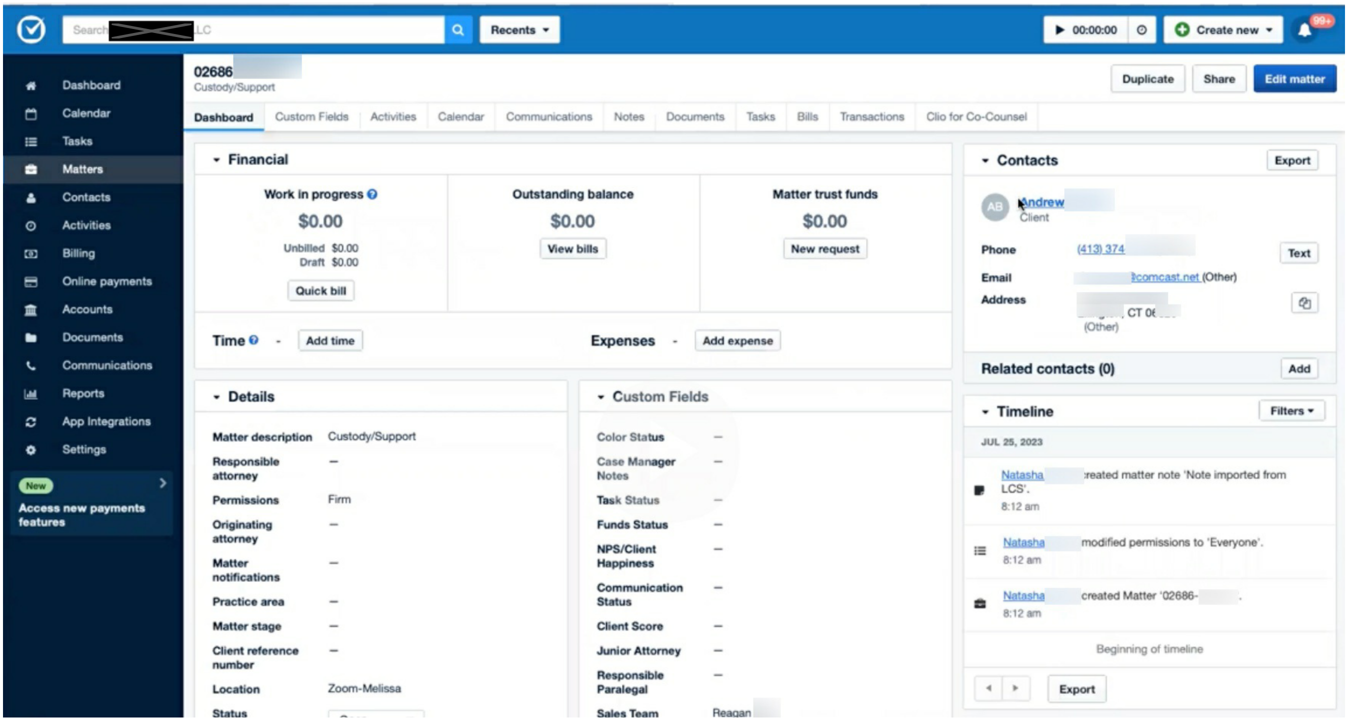
Navigate to the **PNC's CLIO profile.**



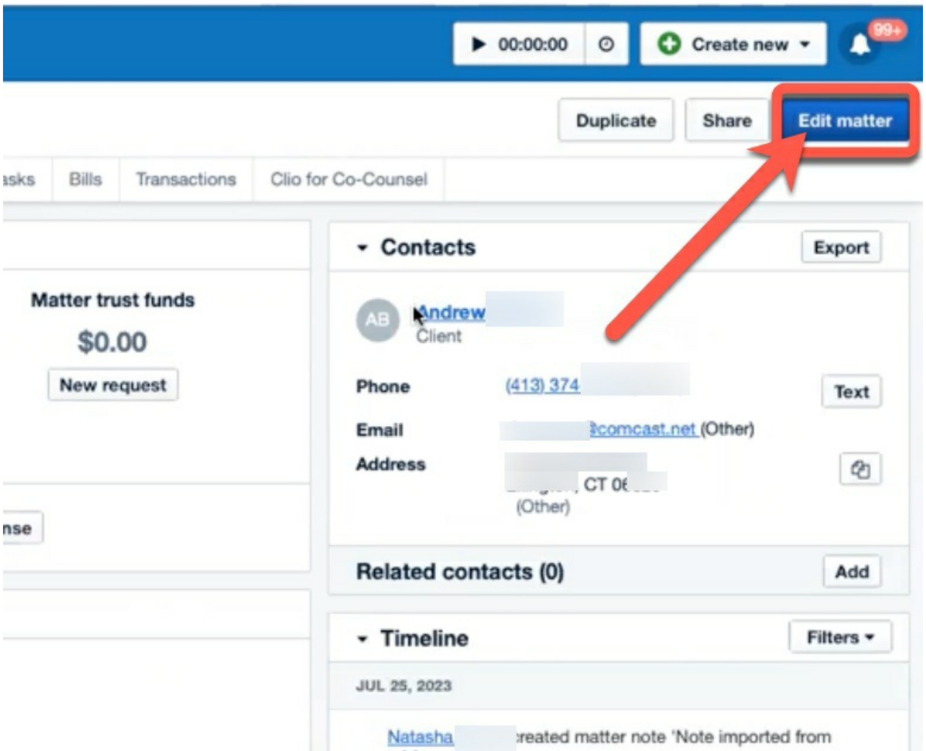
Select the **matter being hired** for in the **"Client's Matters" section.**



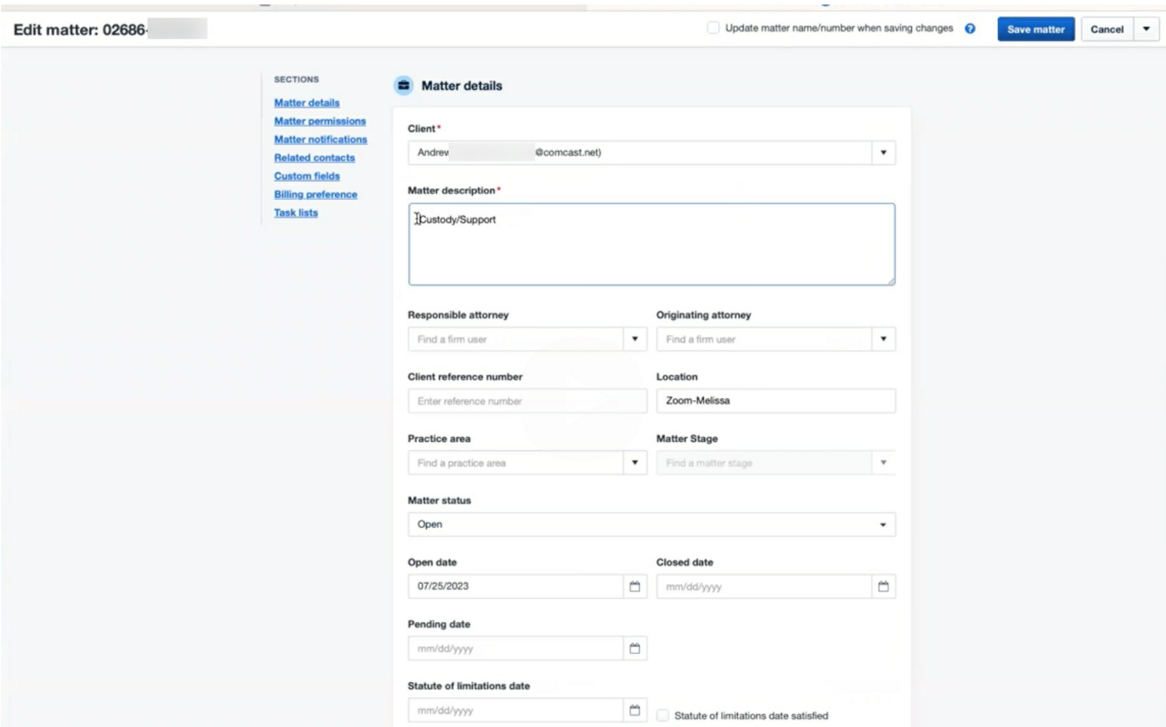
CLIO will populate the **matter information.**



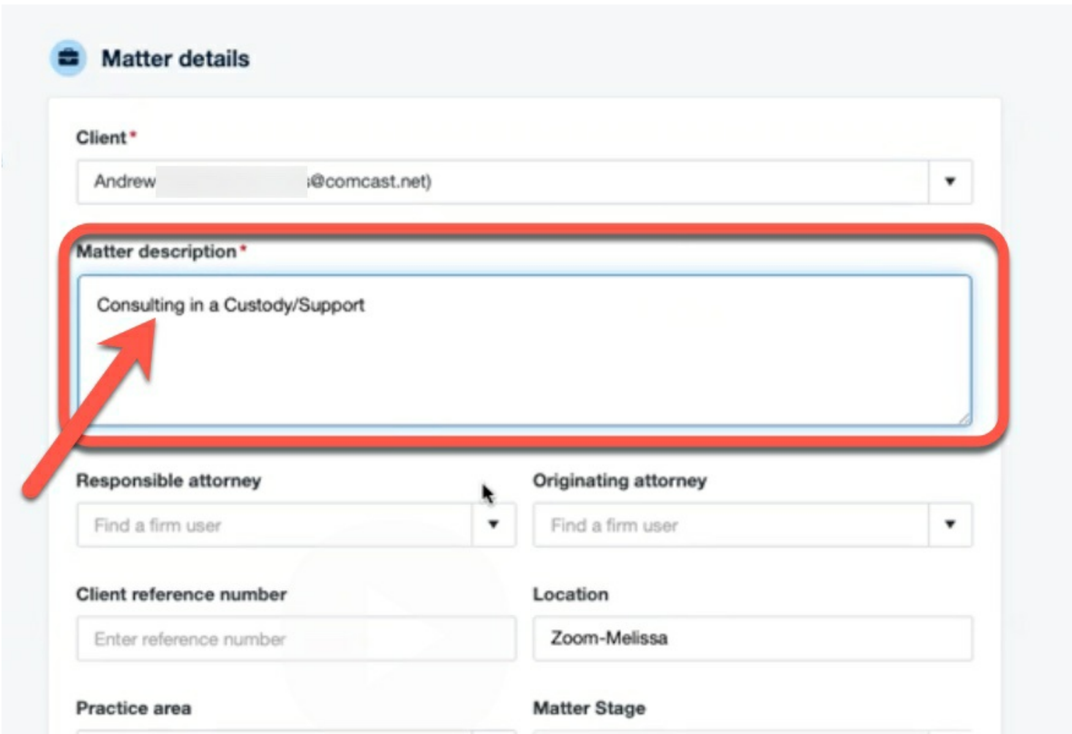
Select **"Edit Matter"** in the top right of the matter information page.



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

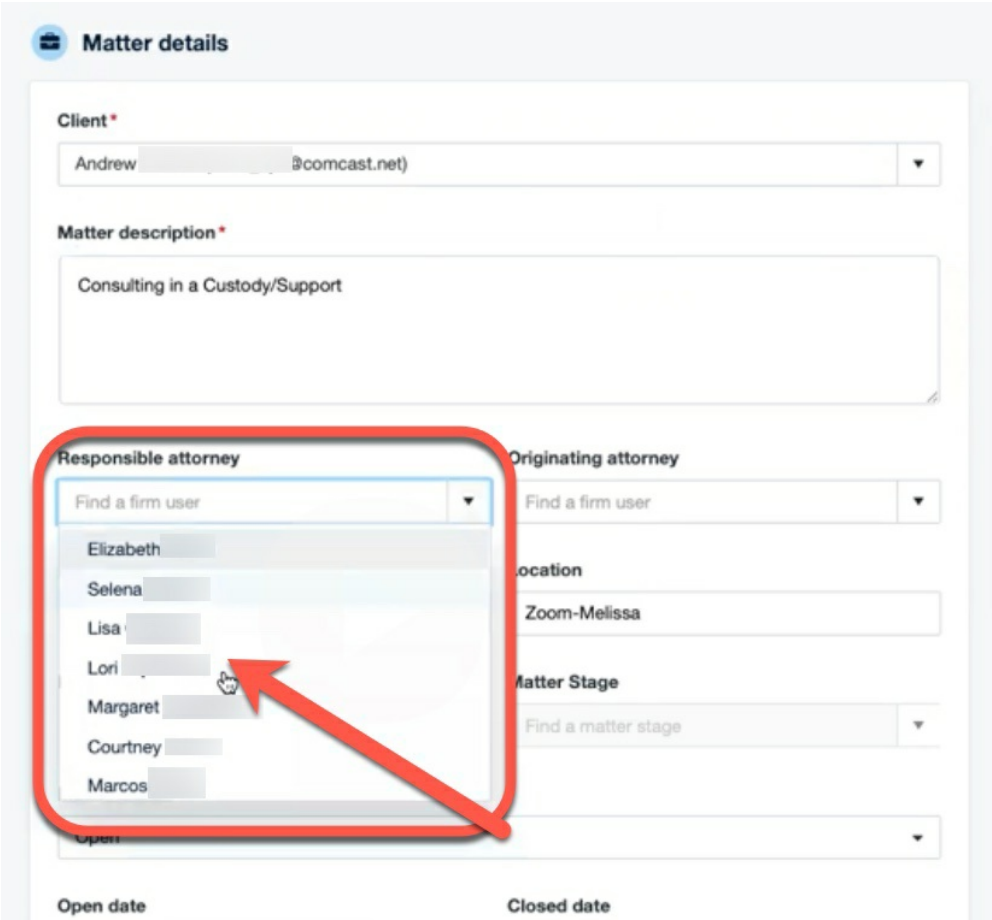


Enter in the **"Matter Description."**



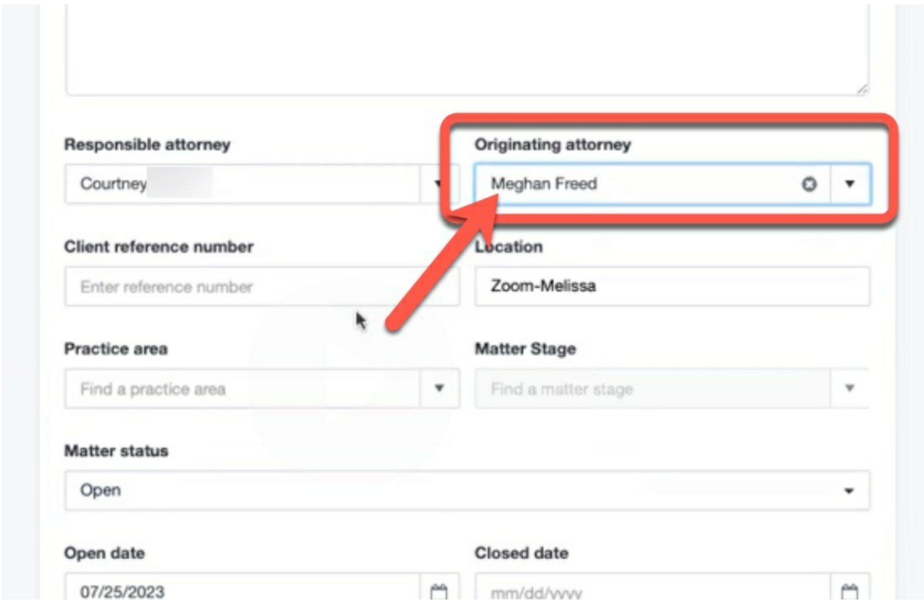
Select the **"Responsible Attorney."**

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

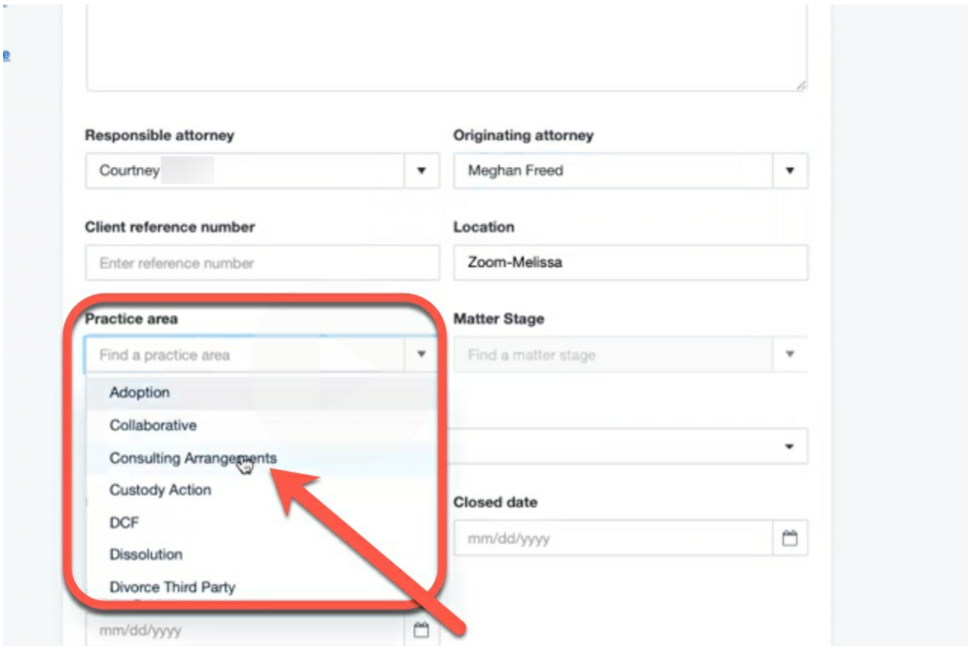


Select the **"Originating Attorney."**

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

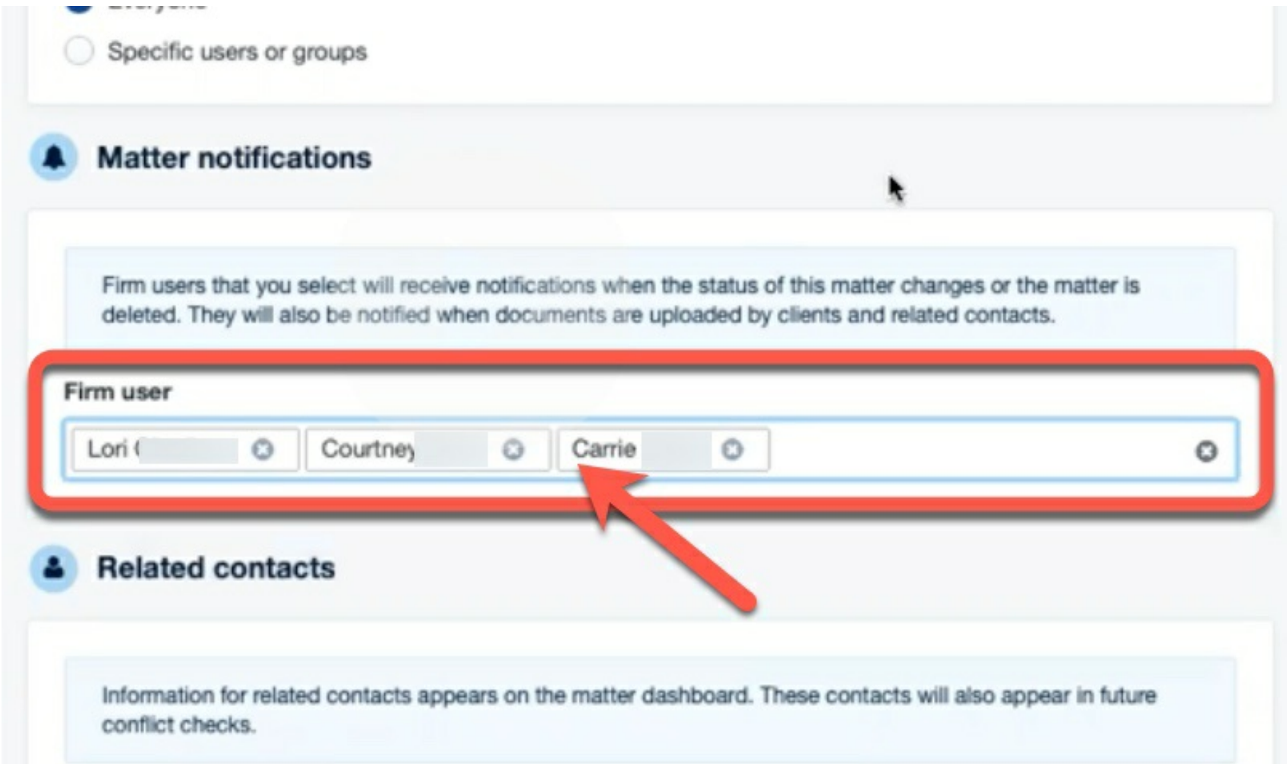


Next, select the **"Practice Area"** from the drop-down menu.

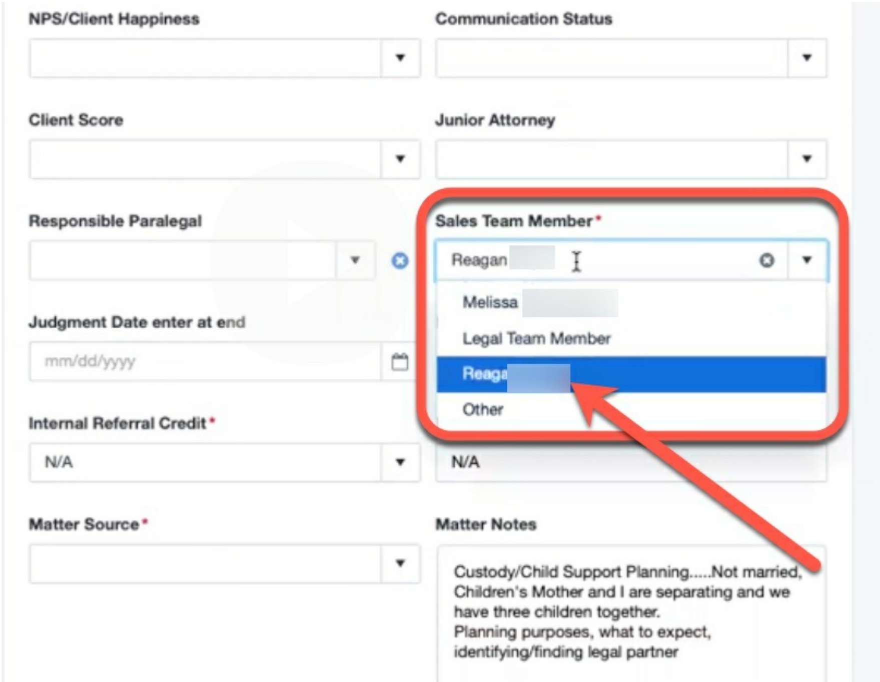


Input the appropriate **individuals** in the **"Matter Notifications" field.**

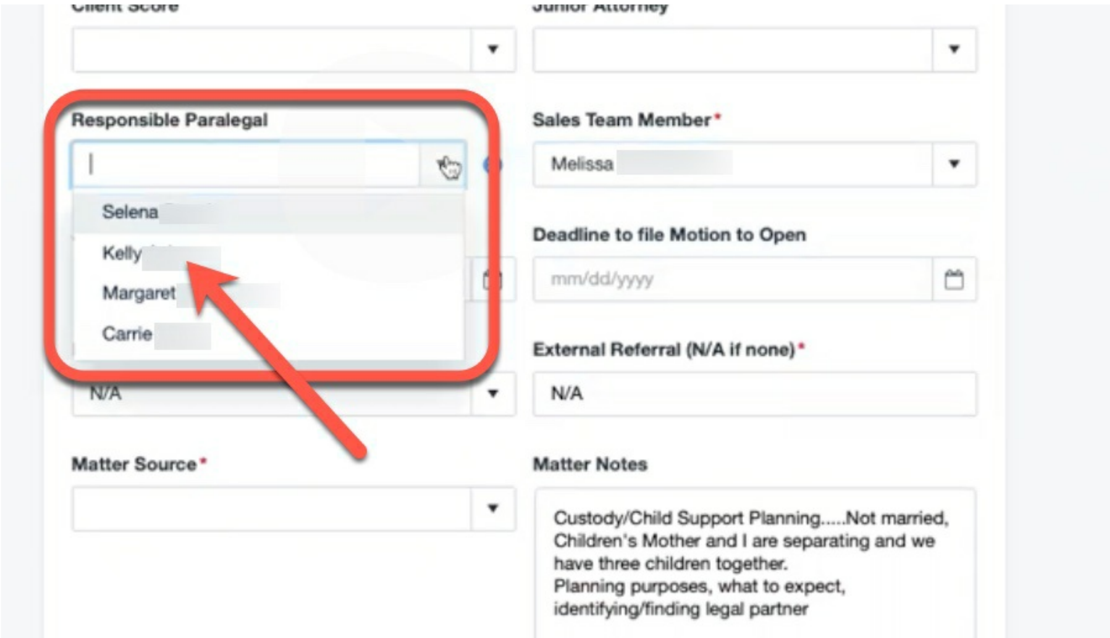
This is always the **billing specialist, assigned attorney, and assigned paralegal.**



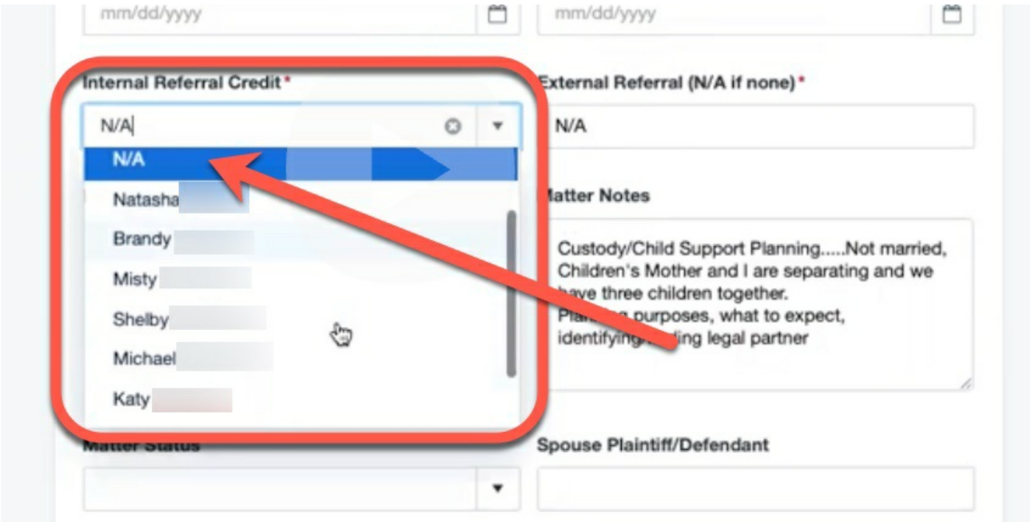
Next, select the **Dragon responsible** for the **"Sales Team Member" field** in the **"Custom Fields" section.**



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

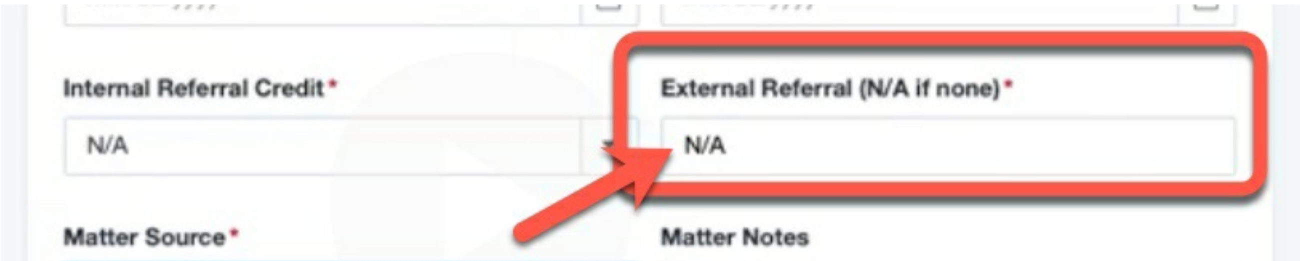


Select the **individual responsible** for the **"Internal Referral Credit"** field if one exists. If there is **not** an **internal referral, select "N/A."**

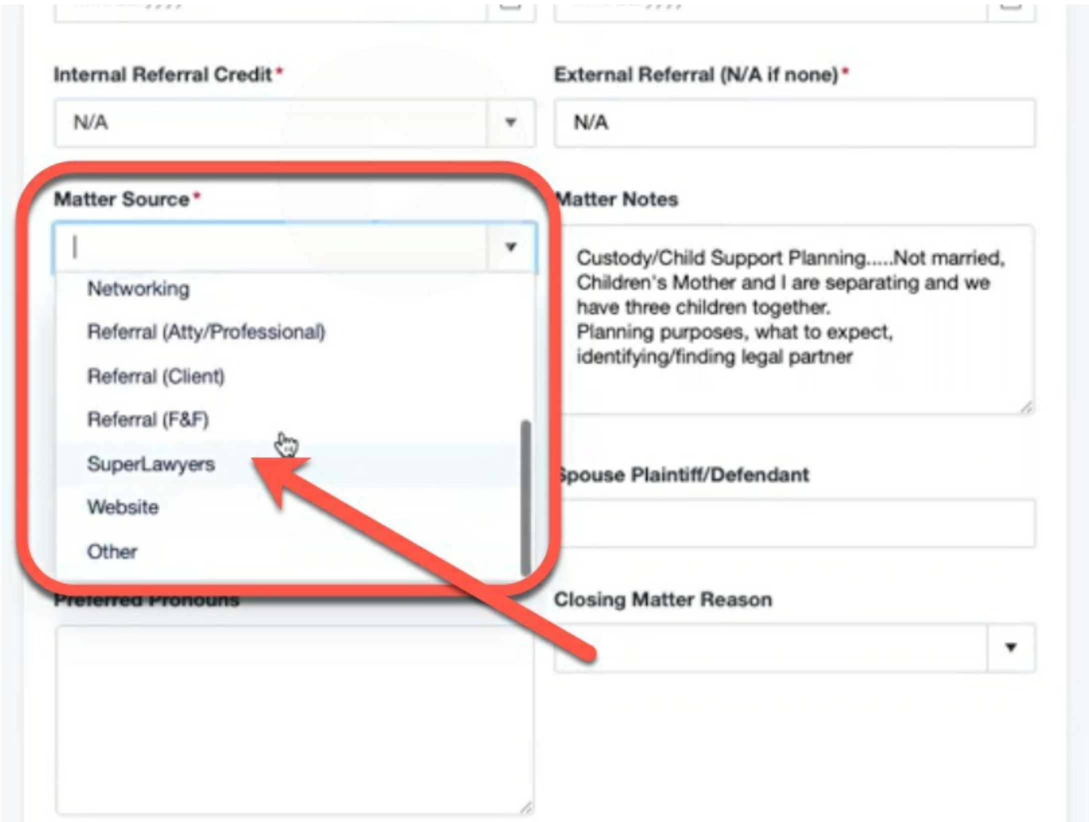


Type in an **"External Referral"** if there is one.

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

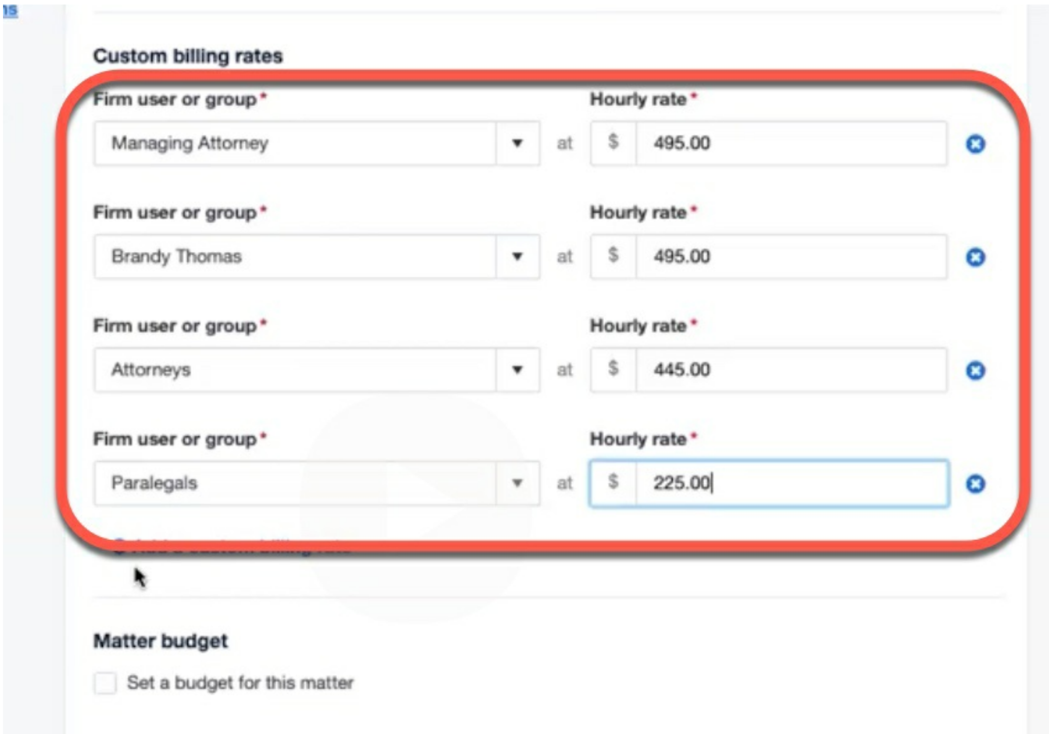


Select the **"Matter Source"** from the field drop-down menu.



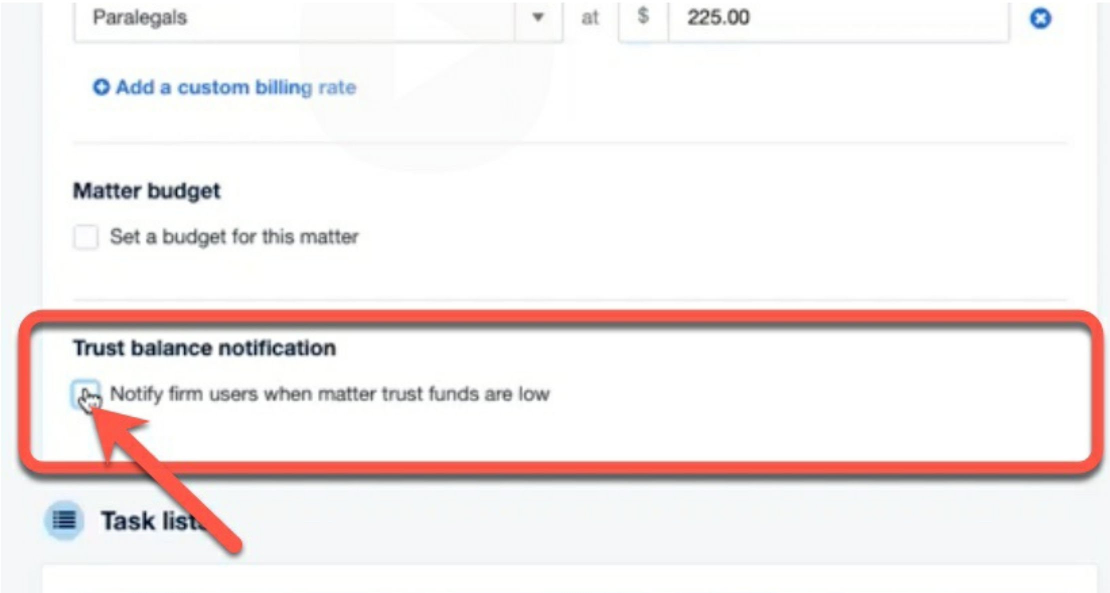
In the **"Billing Preference" section**, enter the **rates** for the:

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



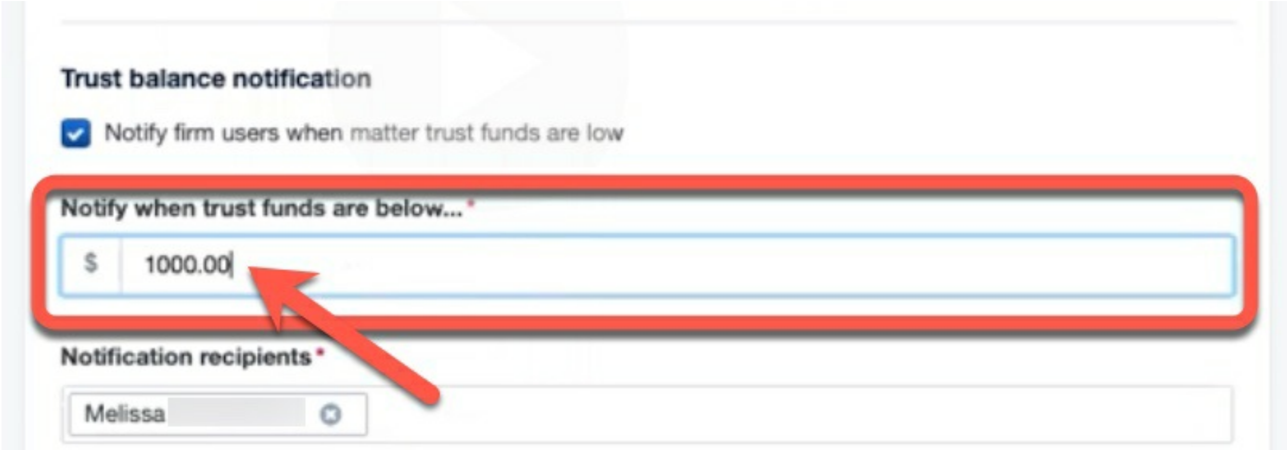
Next, select the **"Trust Balance Notification"** selection box.

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**.

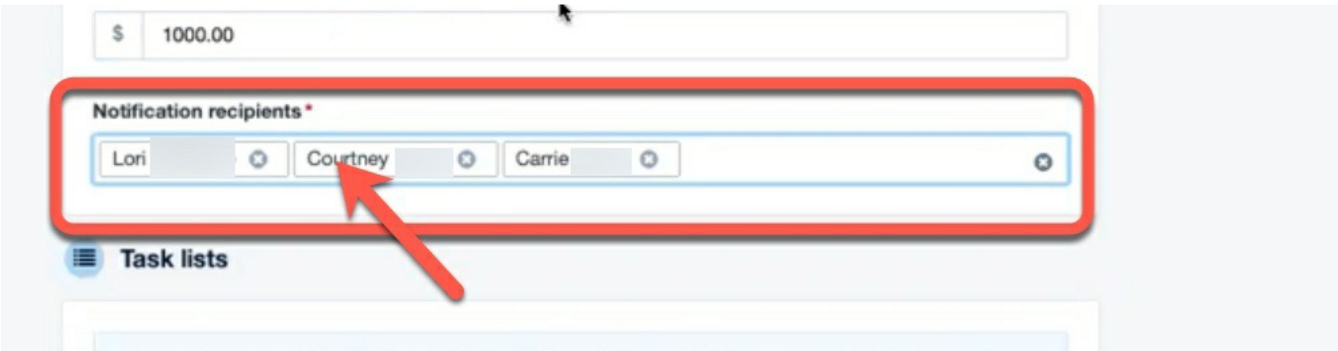


The **"Notification Recipients"** field will **also populate**.

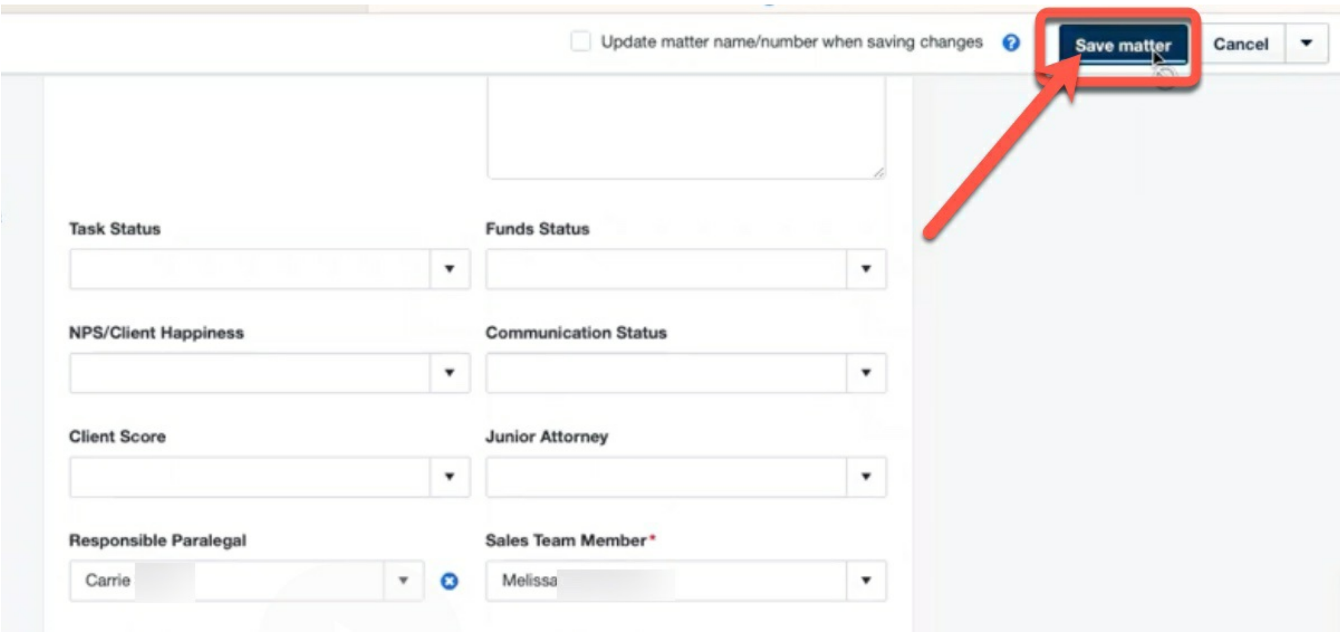
Enter the **individuals** who should be **notified** when the **evergreen retainer** is **half used.**

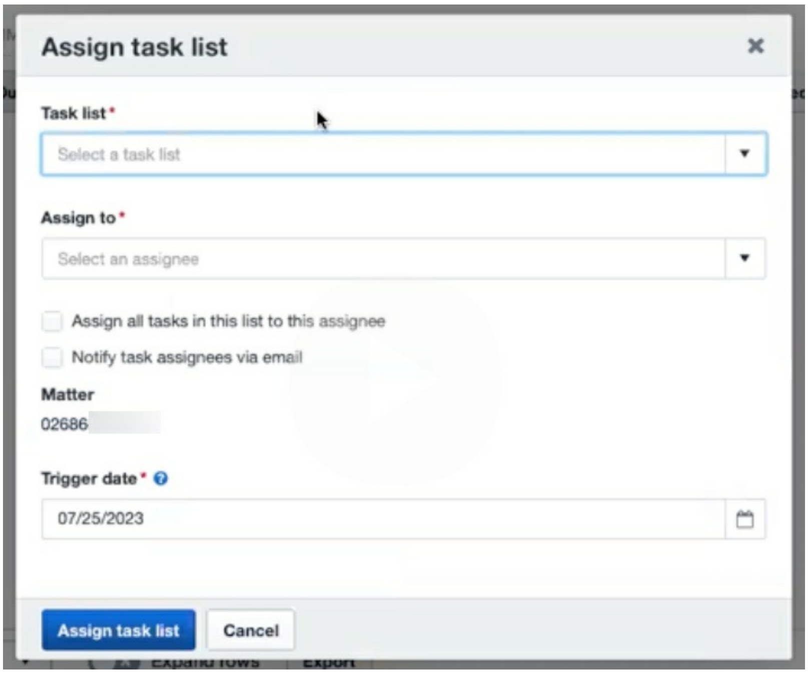
These are the:

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



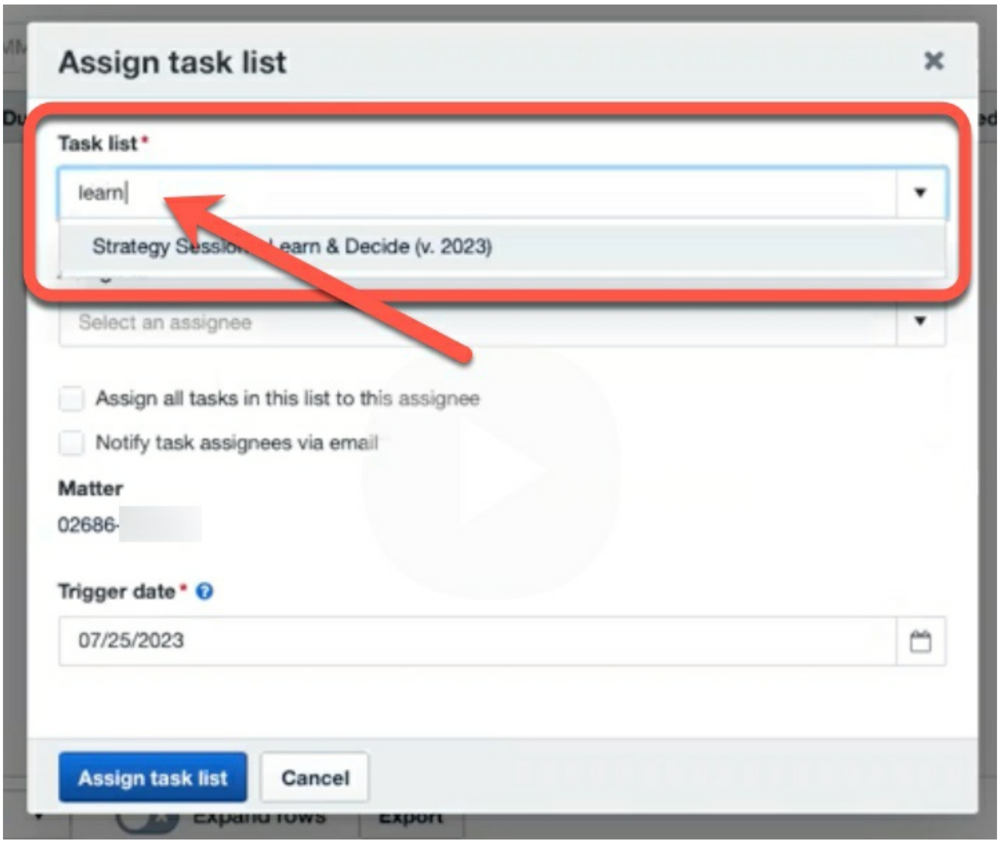
When all this **information** has been **input appropriately**, select **"Save Matter"** in the top right corner of the Matter page.


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



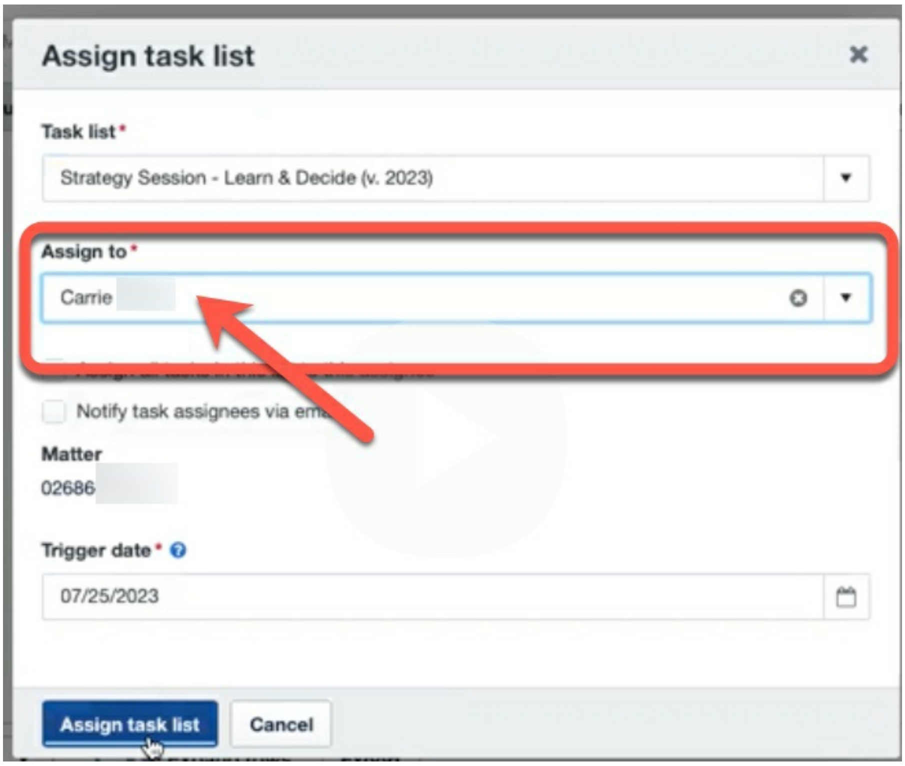
Enter in and **select** the appropriate **"Task List."**

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



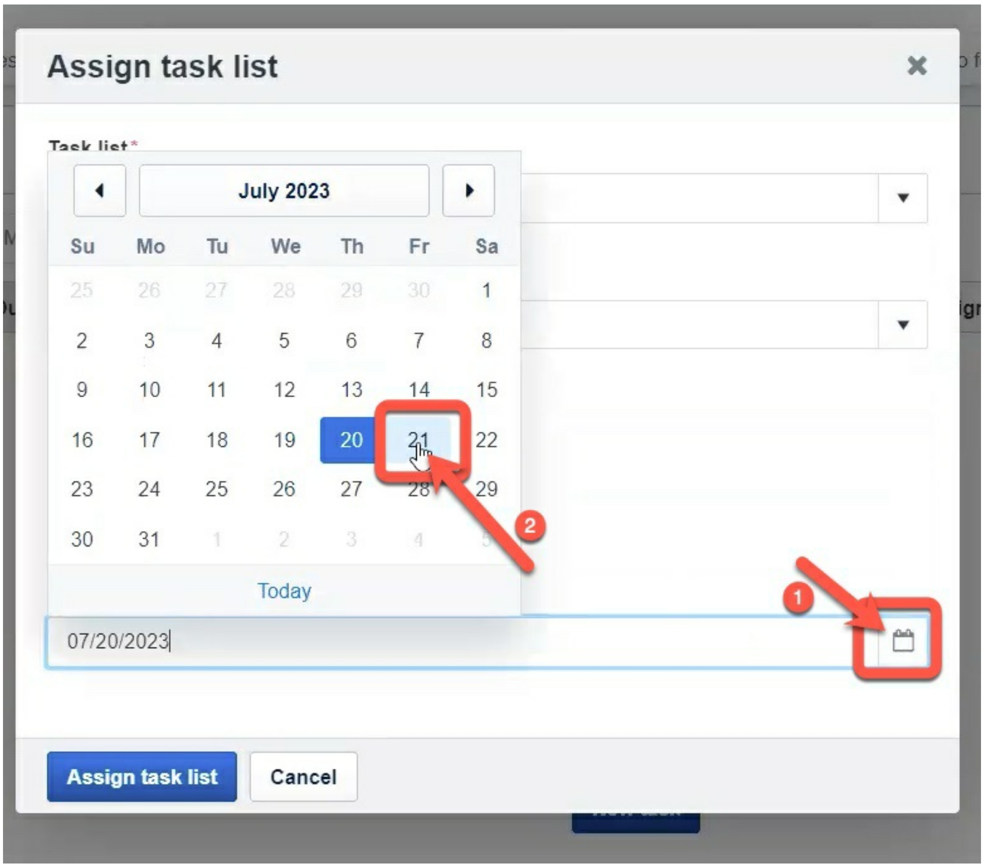
Next, input the **individual receiving** the **tasks** for the **"Assign To" field.**

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

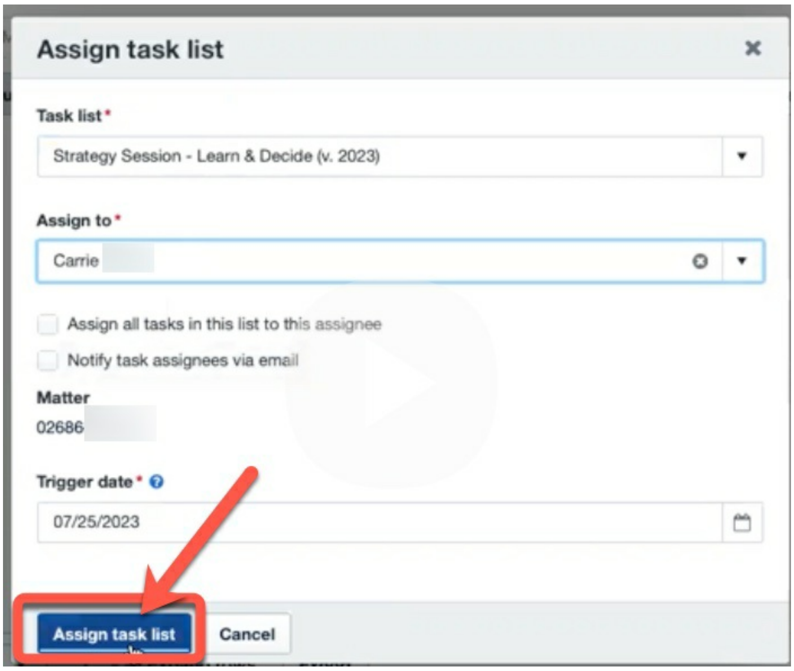


Then, select the task list **"Trigger Date"** using the **calendar widget**.

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



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



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