How a Paperless Law Practice Can Make You More Efficient

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In an era where businesses are paying more attention to their environmental impact, the ideal of a paperless practice remains on the minds of law firms. And whether your focus is on saving time and running your law firm more efficiently, or saving the planet, there are a number of features included with your Clio subscription that can help you embrace a paper-free lifestyle.

Digital Bill Sharing and Payments: Paper-Free Billing

The law firm billing process can often involve extensive paperwork (and time), from generating invoices, to mailing them to clients, to requiring clients to mail you payment in return. Digital billing, when combined with online payments, can not only eliminate the need for paper entirely, but shorten the time it takes law firms to get paid—when bills are shared electronically, coupled with the option to pay online, 57% of bills are paid *the same day clients receive them.*

Through your Clio subscription, you can generate invoices and share them with clients via email or through the client portal. If Clio Payments is enabled, clients can then review and pay invoices online, eliminating the need for paper invoices and checks. This not only accelerates the billing cycle but also reduces paper waste associated with traditional billing methods.

To generate bills:

- 1.Go to **Billing** and select **New bills.**
- 2. Select all the bills you want to generate.
- *3. Optional:* Click Filter to narrow your results.
- 4. Click **Generate**.
- 5. Select the **due date**, **bill theme**, and **bill options**. Learn more about bills options here.
- 6. Click **Generate bills**.

To share bills:

To setup and enable Clio Payments:

With Clio Payments enabled, clients who receive your invoices will be presented with a link to submit payment immediately. Clio Payments is available to all customers and subscription tiers. For details on how to sign up for Clio Payments, please visit here.

Digital Documents

One of the primary culprits behind excessive paper usage in law firms is the requirement for physical documents, often obligating attorneys, staff, and clients to print, sign, and file paperwork. By using the following workflow, you can digitally sign, seal, and deliver documents to your clients, without ever having to visit a post office.

1. **Create** a document template in Clio Manage or in Clio Draft (subscription required)
2. **Draft** a new document using the template in Clio Manage or Clio Draft (subscription required). The document templated you created previously will be automatically populated with information from the associated Clio matter.
3. **Send** document for signature in Clio Manage or with Clio Draft (subscription required)

Note: The number of eSignatures available to your firm each month depends on your subscription plan. For Clio Manage, EasyStart plans have three free eSignatures each month, Essentials plans have 15 free eSignatures each month, and Advanced and Complete plans have unlimited eSignatures. Your eSignature count in Clio Grow is unlimited.

Clio Grow Intake Forms: Streamlined Client Onboarding

Client intake forms are the fundamental first touch in a law firm's journey with a client—but it can be a challenge for both parties, requiring clients to fill out extensive paperwork before legal proceedings can commence. Clio's Grow intake forms digitize this process, making client onboarding significantly more efficient (not to mention environmentally friendly.)

With Clio Grow, firms can create customizable intake forms that clients can complete electronically. From personal information to critical case details, clients can input data directly into the system, eliminating the need for paper forms.

To create a client intake form:

Once a form template has been created, it can be shared via email or embedded into your law firm website.

Building a Sustainable Practice With Clio

As legal technology continues to advance and become more widespread, the legal system in general will become less dependent on paper-centric practices, allowing law firms to unlock new efficiencies and spend less time searching through physical documents. By putting the workflows described above into practice, your law firm will have a head start on reducing your reliance on paper—and whether you intend it or not, the trees will thank you.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.