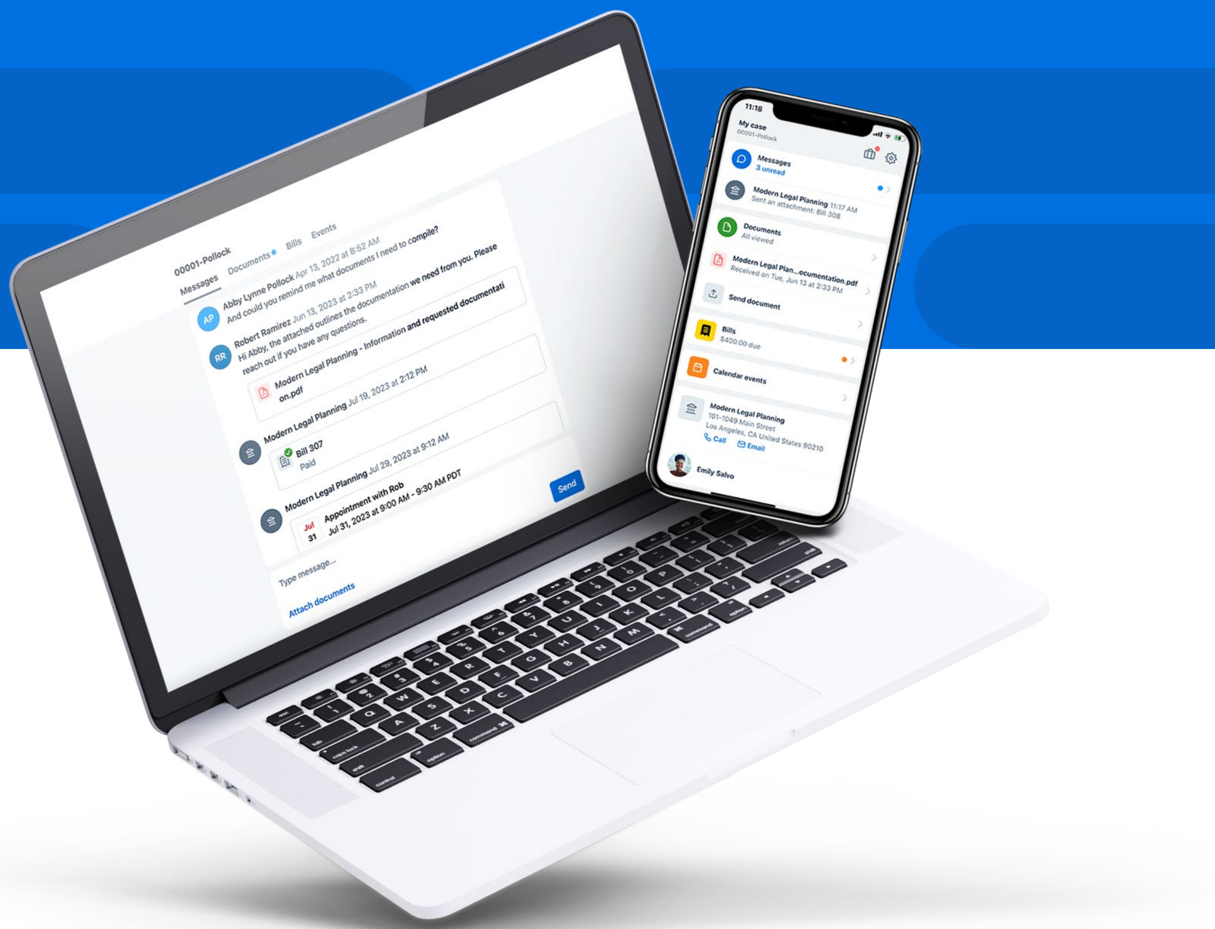
Clio

Clio for Clients Best Practice Guide



Clio for Clients

Clio for Clients is a secure online portal for you and your clients to communicate and share resources. You can create a client portal for a matter in Clio Manage, and then share messages, documents, bills, and calendar events.

Clients can access Clio for Clients—and everything you share with them—from their web browser or our mobile app that features a 4.9–star rating based on thousands of client reviews. Your clients will love it too.

Clio for Clients is free for clients to use, and it’s included in Essentials, Advanced, and Complete subscriptions.

Clio for Clients provides clients a secure and convenient way to communicate with your firm. They can receive updates, share documents, and access case information from a secure client-attorney portal.

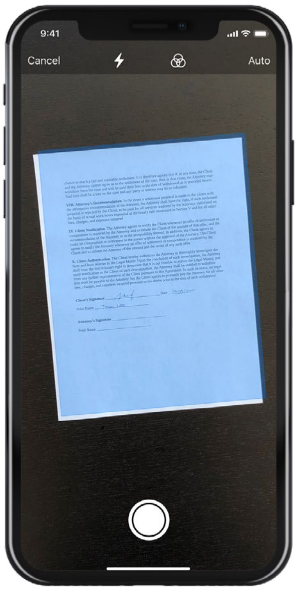
Clio for clients makes it easy for your clients to:

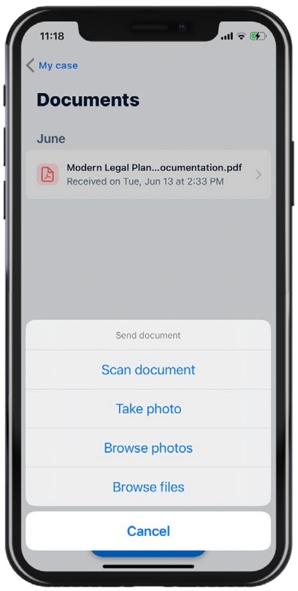
- **Securely send documents.** Scan documents using the built-in scanner or upload them directly from your file folder or camera roll.

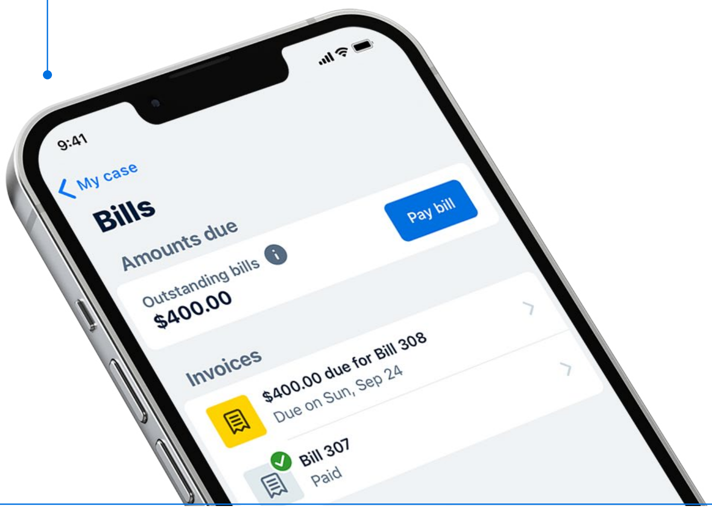
- **Communicate privately.** Securely send and receive messages with your lawyer—and ensure that all your case information is protected.

- **Stay on top of your case.** Keep files and messages organized in one central place and get notifications when documents are ready for review.

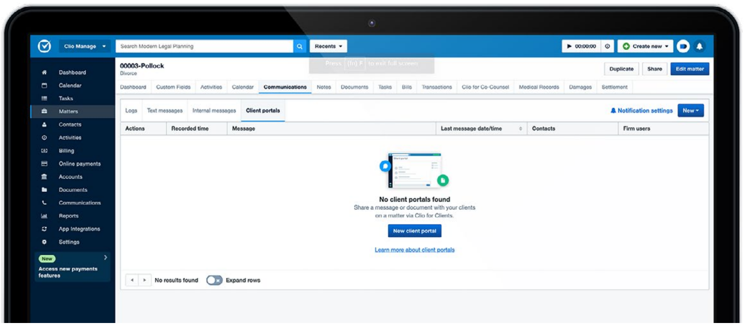
- **Access and pay invoices.** Make payments in seconds with credit, debit, and eCheck options or view your payment history.





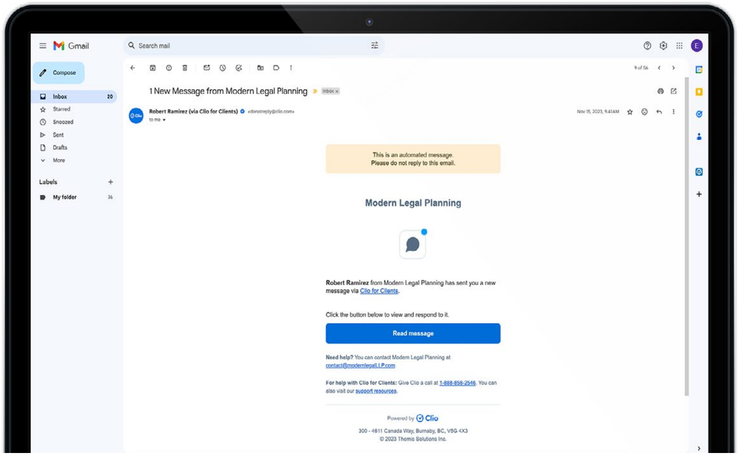


Getting Started



Step 1

To get started, create a new client portal for a client matter.



Step 2

Once created, you can then share messages, documents, bills, or calendar events through the portal. For each item shared, your client will receive an email notification with a link to access it via Clio for Clients.

Your clients can access Clio for Clients from any device. Once you've shared an item with them, they can log in from clients.clio.com or use the mobile app available in the Apple or Google Play store to reference information about their case.

Pro Tip

When opening a new case, create a client portal as soon as you set up the matter. This ensures that calendar events, invoices, and documents are all stored in one central location for easy client access.

Best Practices

Before creating your first client portal:

- ☐ Include the link to Clio for Clients (clients.clio.com) on your website for easy client access. Once they log in, they'll only have access to the information you've shared with them.
- ☐ Sign up for Clio Payments so your clients can pay from the portal.
- ☐ Download the Clio for Lawyers and Law Firms mobile app to respond to client messages on the go.

When creating a client portal:

- ☐ When creating a new matter, create a client portal right away to ensure all documents, invoices, and calendar events get shared to the client portal.
- ☐ Add other firm members to a client portal for collaboration.
- ☐ Create and share a documents folder to your client portals to keep documents organized.
- ☐ Encourage clients to use the mobile app's document scanner to ensure multi-page documents get combined into one PDF.
- ☐ With each new client, introduce Clio for Clients by sharing a brief message. Below is an example you can copy and tailor for your firm:

> *Hi [client name],*
>
> *To keep all information about your case organized and accessible to you at all times, we've created a secure online portal, which you can access using a service called Clio for Clients.*
>
> *This portal will allow you to privately send and receive messages, review and share documents, keep track of important dates and events, and pay invoices via credit card, debit card, Apple Pay, or Google Pay.*
>
> *When we share a new item with you, you'll receive an email notification with a link to access the portal. You can access the portal using your web browser or the Clio for Clients mobile app, which is available—at no cost—for both Apple and Android devices.*
>
> *You can learn more about Clio for Clients, and see how it works at clio.com/clients.*
>
> *If you have any questions, please don't hesitate to reach out [insert your firm's preferred contact method].*
>
> *Sincerely*
>
> *[Law Firm Name]*

See how this attorney uses Clio for Clients to eliminate client emails.

Clio for clients has changed our entire practice. We have eliminated email for our clients, and we do everything through the Clio for Clients portal.

Leslie A. Williams, Esq.
Co-Founder and Attorney, Morris Williams LLC

Leslie's checklist to help you use Clio for Clients

Leslie's firm uses Clio for Clients from the beginning to the end of a case. Here are the first steps they take when opening a new case.

1. Create a matter.

2. Open a new client portal.

At the start of every case, Leslie sets up a new client portal. Here is an example of the welcome message Leslie's firm sends to their clients through the portal:

> *Hi [Client Name],*
>
> *Welcome to your Clio for Clients portal, designed for clients to communicate with our team, share documents effortlessly and securely, and have access to your electronic file at your convenience! My name is ____ and I'm the _____ at _____. [Intro of the team member sending the message.]*
>
> *After this message, we will share a Welcome Letter with you that contains some tips on how best to get started working with our firm. The Welcome Letter includes a questionnaire that we need you to fill out, along with some other forms with information that will be needed at some point during your case progression. Having this information at the beginning of your case will help streamline the progression of your matter moving forward.*
>
> *Please have the requested items in your Welcome Letter, the questionnaire, and other requested documents completed and uploaded by [provide a date].*

3. Send a welcome letter.

As a divorce attorney, Leslie has to be extremely organized. Her team uses folders to ensure everything between the firm and the client is structured and accessible. Within the welcome letter, clients are informed that documents and folders will be shared through the portal. They are also provided with specific instructions on what information needs to be uploaded to the welcome package folder.

The welcome letter also sets the following expectations on how clients should use the portal and engage with their firm.

Client Portal Do's and Donts

DO review your email inbox or client portal daily for any communications from your legal team, or set up notifications. The client portal is the main way our firm will contact you.

DO prepare a list of questions before meeting with your legal team. Submit this list to your attorney through the portal prior to your meeting to save time and reduce legal expenses and effort.

DON'T treat messaging in the portal like a casual, text-message conversation unless it is part of a scheduled and confirmed text meeting in your calendar.

Why Leslie's clients love using Clio for Clients

- It's secure.
- They can use the Clio for Clients app or pull it up on their computer.
- They can easily drag and drop documents.

> Clio for Clients helps the mental health of our attorneys and staff because we don't come in every day being inundated with emails that we're going to have to sift through, which will dominate our schedule.
>
> **Leslie A. Williams, Esq.**
> Co-Founder and Attorney, Morris Williams LLC

For more tips on how to use Clio, check out these helpful resources:

Join the community
Connect with other legal professionals using Clio through our forum.

Power up with Clio
Join us in a monthly webinar diving into best practices.

See what's new
Join our quarterly webinar featuring our latest product updates.

Have questions?
Visit Help Center or contact customer support at 1-888-858-2546.

Clio