



FIRSTLEGAL
COURT & PROCESS

ACCESSING and USING **CLIO**

The Clio integration for First Legal's eFiling portal (First Connect) streamlines the movement of documents for eFiling orders between the two systems.



WHAT IS CLIO?

Clio, a leading legal technology company and developer of the world's first comprehensive legal operating system, centralizes cloud-based and client-centered technologies law firms need to run more sustainable, effective, and efficient practices, including legal practice management, client intake, customer relationship management, accounting, and more.

Their website is: <https://www.Clio.com/>

KEY BENEFITS

The integration streamlines the movement of documents for eFiling orders in the following ways:

- ▶ When placing an eFiling order, documents can be loaded into the portal workflow directly from Clio. This saves time by eliminating the need to download a document from Clio to the local computer first before uploading it to the portal.
- ▶ When an eFiling order is completed by the court clerk, returned documents are automatically saved into the Clio system in the proper Client and Matter folder.
- ▶ Additionally, court fees from eFilings are also populated and saved within Clio, providing additional information for the law firm.

CONNECTING CLIO TO FIRST CONNECT

You will see the Clio option on the Documents tab when submitting an eFiling. After selecting to upload a file from Clio, you will be prompted to make the connection.

From the “Documents” tab of an eFiling order, after selecting a Document Type, click the “Browse” button then “Clio”.

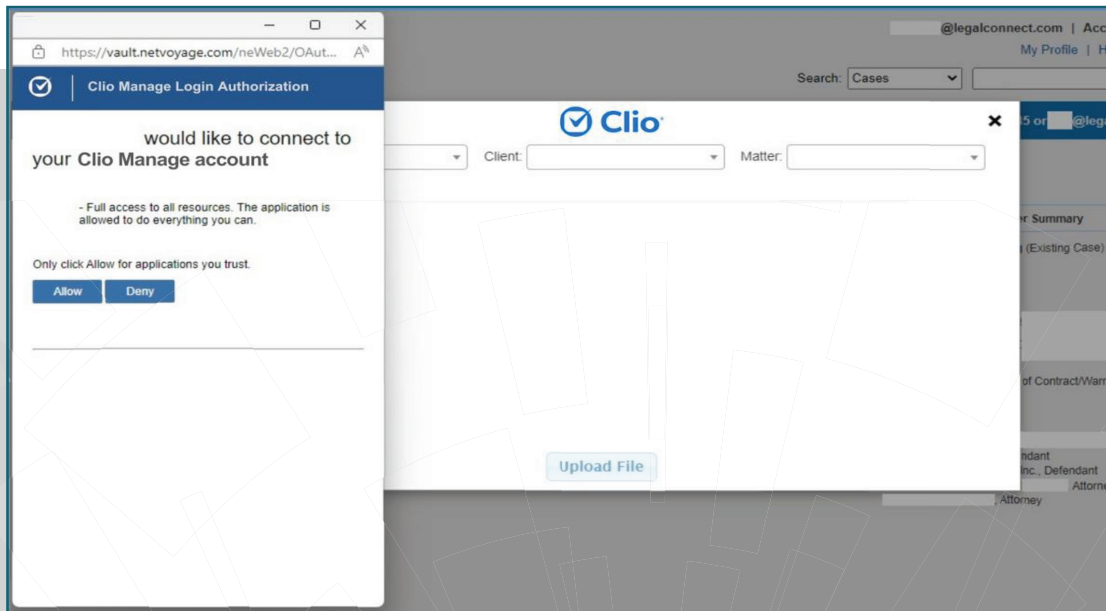
The screenshot shows the eFiling interface. At the top right, there is an account number and links for 'My Profile', 'Help', and 'Logout'. Below this is a search bar with 'Cases' selected and a 'Go' button. The main navigation bar includes 'Place Order', 'Manage Cases', 'Pending Orders', and 'Closed Orders'. A support number '(800) [redacted] or [redacted]' is also visible. The main content area has a dropdown menu for 'What would you like us to do?' set to 'eFiling'. Below this are tabs for 'Order Info', 'Case Info', 'Case Participants', 'Documents', 'Court Fees', and 'Order Details'. The 'Documents' tab is active, showing '1. Select Document Type' with radio buttons for 'Contains' (selected) and 'Starts With'. A text input field for 'Notice (name extension)' is present, along with a link 'or, Pick from list'. Below this is '2. Upload File' with a 'Browse' button. A dropdown menu is open from the 'Browse' button, showing 'Clio Manage' (selected) and 'NetDocuments'. Below the dropdown is 'Documents To Be Filed' with a note: 'Please review all document details prior to submission. To prevent rejection, please ensure that all documents are text searchable.' At the bottom are 'Previous' and 'Next' buttons, and a 'Save As Draft' button. On the right side, there is an 'Order Summary' section for an 'eFiling (Existing Case)' with details for County, Case Info, and Case Participants.

2. A pop-up window will open asking you to enter your Clio credentials.

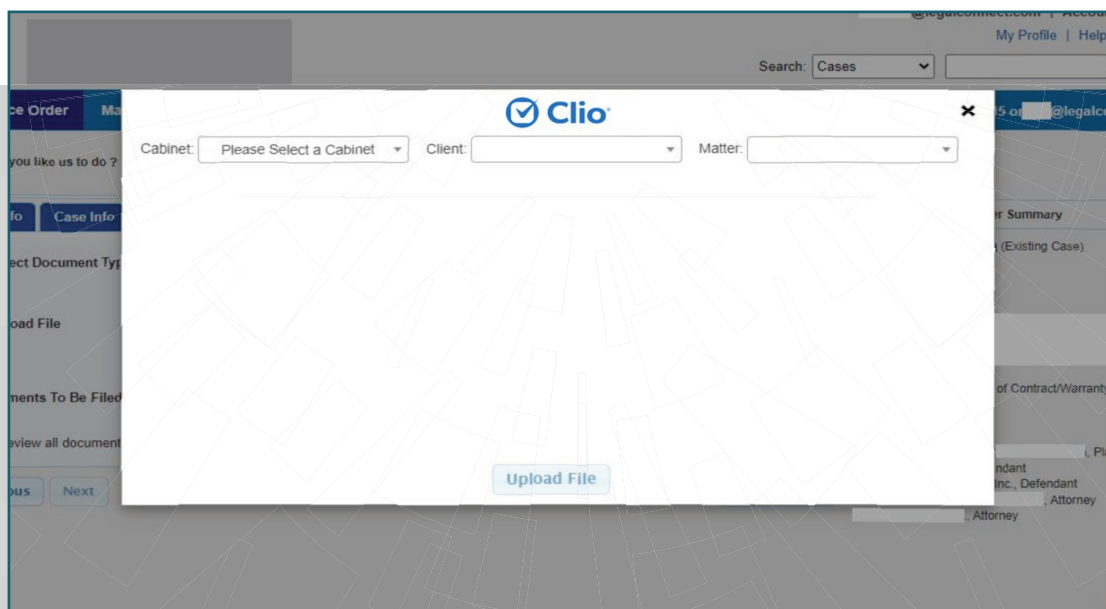
The screenshot shows the eFiling interface with a 'Clio Login' pop-up window overlaid. The pop-up window has the Clio logo and the text 'Sign in to Clio Manage'. It contains an 'Email' input field and a 'Next: Password' button. Below the input field, there is a link for 'Have questions or need help?' and a copyright notice for 2023 Themis Solutions Inc. The background shows the eFiling interface with the 'Documents' tab active and the 'Clio Manage' option selected in the dropdown menu.



3. After providing your Clio credentials, you will be asked to allow the connection to your Clio account.

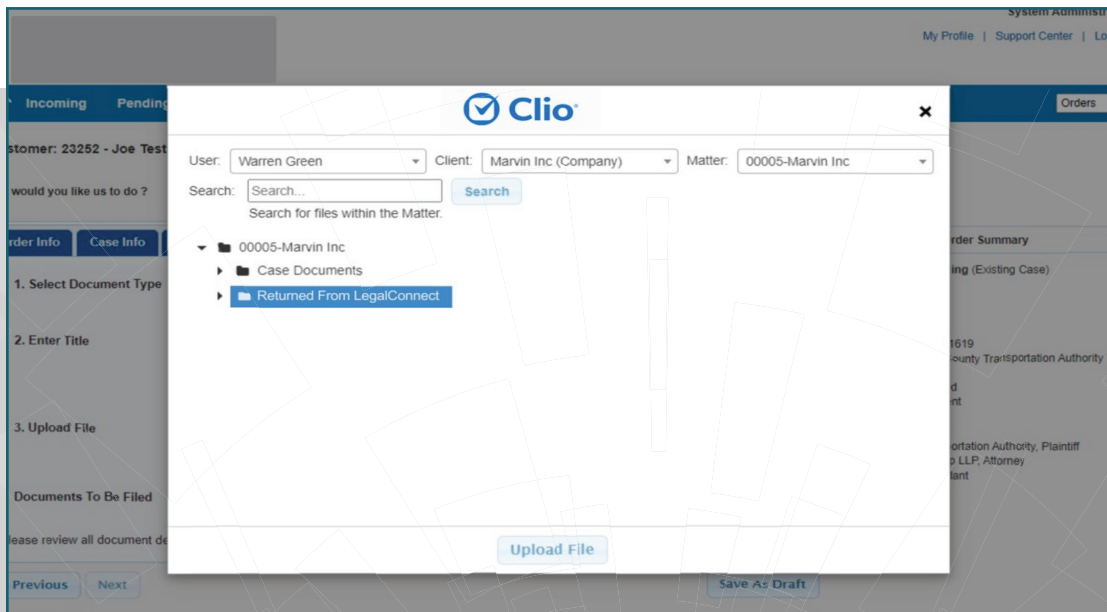


4. Once the connection is allowed, the pop-up window closes, and you return to the eFiling workflow and see the Clio file selection window.

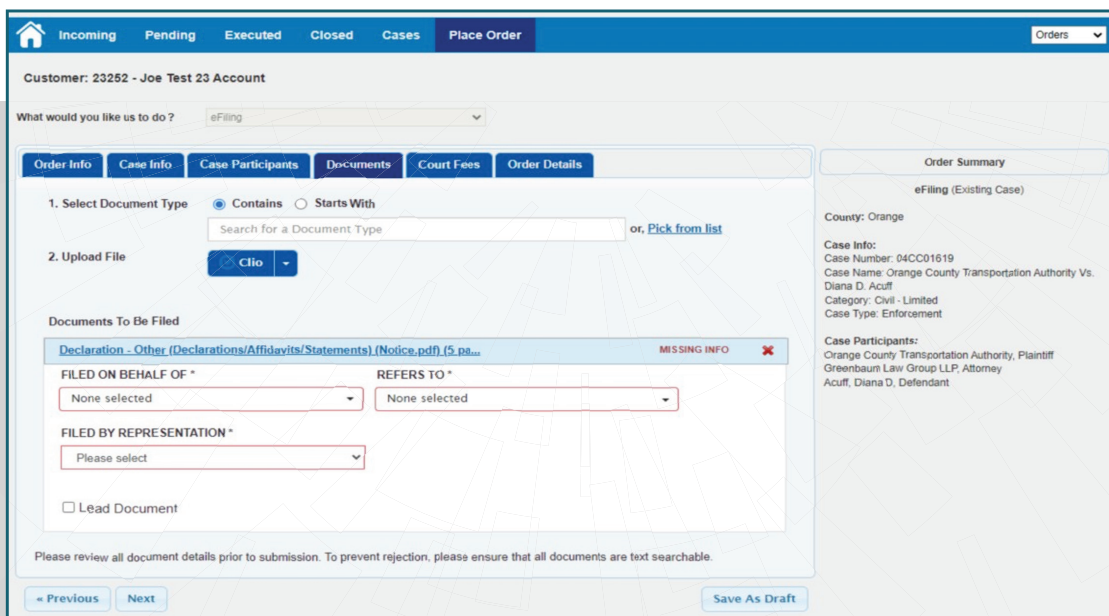


UPLOADING A DOCUMENT TO THE PORTAL FROM CLIO

5. After establishing the connection between the portal and Clio, you can browse to a Clio Cabinet, Client, and Matter and see the folders and files.



6. After selecting a file and clicking the “Upload File” button, the document is pulled directly from Clio into the portal, added to the order, and appears in the “Documents To Be Filed” section. PLEASE NOTE: All document PDFs must conform to court rules for submission. A password-protected, or fillable pdf document will cause an error message to be displayed.

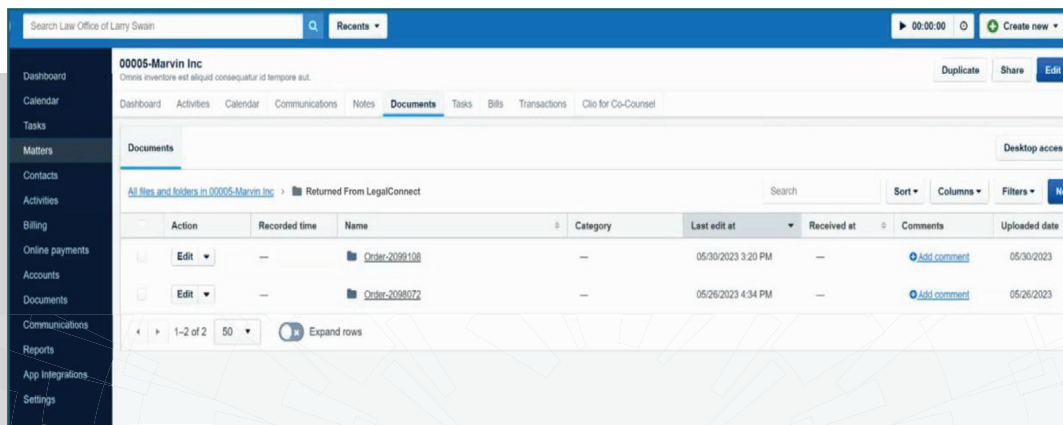


VIEWING DOCUMENTS RETURNED FROM THE COURT

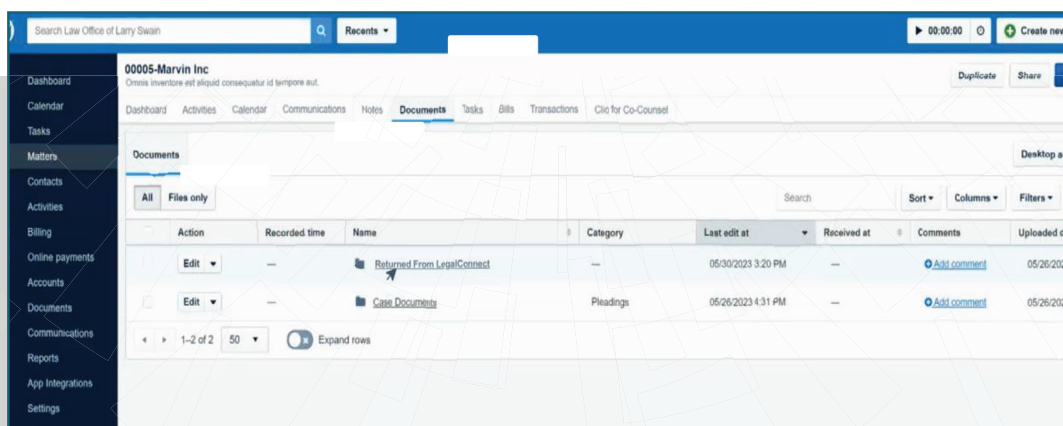
When utilizing the integration between Clio and First Connect, all standard functionality for court-returned documents is still available. Court-returned documents will be viewable in the “Deliverables” tab of the portal order, and you will receive the email from First Legal indicating whether your eFiling order was Accepted, Rejected, or Partially Accepted along with links to download the documents.

In addition, the court returned documents will be automatically saved into your Clio account under the Client and Matter you selected when submitting the order.

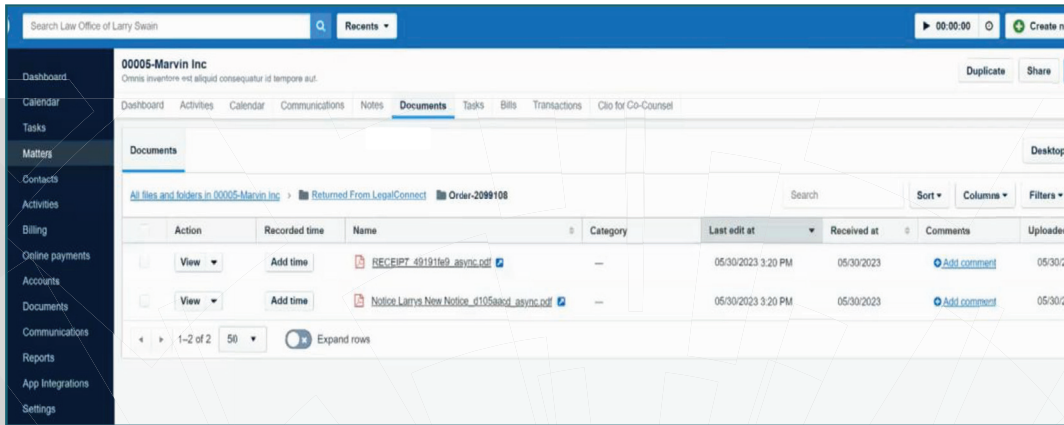
Log in to your Clio account and navigate to the Client and Matter you selected when submitting the eFiling order in the portal. Locate the folder named “Returned from *First Legal*”.



2. In the “Returned from *First Legal*” folder you will see a list of all portal orders submitted under this Client and Matter. Locate the proper folder by matching the Order Number assigned when the eFiling order was submitted in the portal.



3. In the folder “Order-#####” you will see all documents returned from the court including stamped conformed copies, receipts, and notices as appropriate.



VIEWING COURT FEES

Court Fee data from submitted eFilings is populated and saved within your Clio account. On the “Activities” page, you can view and edit expenses from your eFiling.

To view fee entries, click on the “Activities” button on the left-hand side of the portal. On this page, you will see the expenses related to the particular eFiling order. You can navigate your eFiling expenses by their matter, date, or type.

Actions	Type	Qty	Description	Matter	Rate (\$)	Non-billable...	Billable (\$)	Date	User	Invoice status
<input type="checkbox"/>	Expense	1.00	LegalConnect Invoice# 208516	00005-Marvin Inc. Omnis Inv...	12.05	—	12.05	05/30/2023	Larry Swain	Unbilled
<input type="checkbox"/>	Expense	1.00	LegalConnect Invoice# 208514	00005-Marvin Inc. Omnis Inv...	12.05	—	12.05	05/26/2023	Larry Swain	Unbilled
<input type="checkbox"/>	Expense	1.00	LegalConnect Invoice# 208552	00064-QA-QA	445.25	—	445.25	04/14/2023	QA TEAM	Unbilled
<input type="checkbox"/>	Expense	1.00	LegalConnect Invoice# 208560	00001-DevMatterUT_DevMat...	12.11	—	12.11	04/06/2023	QA TEAM	Unbilled
<input type="checkbox"/>	Expense	1.00	LegalConnect Invoice# 208574	00001-DevMatterUT_DevMat...	12.20	—	12.20	04/05/2023	Andy LE	Unbilled
<input type="checkbox"/>	Expense	1.00	LegalConnect Invoice# 208519	00001-DevMatterUT_DevMat...	26.70	—	26.70	03/28/2023	Andy LE	Unbilled
<input type="checkbox"/>	Expense	1.00	LegalConnect Invoice# 208523	00001-DevMatterUT_DevMat...	50.25	—	50.25	03/28/2023	Andy LE	Unbilled
							\$570.61			

- To assign expenses to the appropriate expense category, simply scroll to the expense you would like to alter and click on the “Edit” button in its row.

Actions	Type	Qty	Description	Matter	Rate (\$)	Non-billable...	Billable (\$)	Date	User	Invoice status
<input type="checkbox"/> Edit	\$	1.00	LegalConnect Invoice# 208516	00005-Marvin Inc. Cmms Inv...	12.05	—	12.05	05/30/2023	Larry Swain	Unbilled
<input type="checkbox"/> Edit	\$	1.00	LegalConnect Invoice# 208514	00005-Marvin Inc. Cmms Inv...	12.05	—	12.05	05/26/2023	Larry Swain	Unbilled
<input type="checkbox"/> Edit	\$	1.00	LegalConnect Invoice# 208552	00064-QA-QA	445.25	—	445.25	04/14/2023	QA TEAM	Unbilled
<input type="checkbox"/> Edit	\$	1.00	LegalConnect Invoice# 208560	00001-DevMatterUT_DevMat...	12.11	—	12.11	04/06/2023	QA TEAM	Unbilled
<input type="checkbox"/> Edit	\$	1.00	LegalConnect Invoice# 208574	00001-DevMatterUT_DevMat...	12.20	—	12.20	04/05/2023	Andy E	Unbilled
<input type="checkbox"/> Edit	\$	1.00	LegalConnect Invoice# 208519	00001-DevMatterUT_DevMat...	26.70	—	26.70	03/28/2023	Andy E	Unbilled
<input type="checkbox"/> Edit	\$	1.00	LegalConnect Invoice# 208523	00001-DevMatterUT_DevMat...	50.25	—	50.25	03/28/2023	Andy E	Unbilled
							\$970.61			

- Once you’ve clicked on the matter’s “Edit” button, you may select an expense category for that matter and save.

Edit expense entry

Expense category: Select an expense category

Quantity: 1.00 Rate: \$ 12.05 Required: Total amount: \$ 12.05

Non-billable Show this entry on the bill

Description: Service Provider Invoice# 2102670

Matter: 00005-Marvin Inc

Date: 06/12/2023 (Required)

Firm user: Larry Swain (Required)

Buttons: Save entry, Save and create another, Save and duplicate, Cancel, Delete

FREQUENTLY ASKED QUESTIONS

How do I connect to my Clio account?

Click “Place Order” and start an eFiling order. When you arrive on the “Documents” tab, select a Document Type, and click the “Browse” button. You will see the option to select “Clio”, select this option and a pop-up window will open where you enter your Clio credentials and establish the connection.

Do I have to enter my Clio credentials every time I submit a new eFiling order?

The length of time that the connection between First Connect and Clio stays active is primarily dependent on Clio. If you submit a second eFiling order immediately after the first one you likely will not have to re-enter your Clio credentials. However longer time periods may require you to allow the connection again. If your Clio credentials are saved by your browser this will make the process quicker as they will automatically populate in the connection pop-up window.

Does the email address in my First Connect account need to match the email address in my Clio account?

No. Your Clio email and password do not need to match your First Connect email and password. If your Clio credentials are valid, the connection will be established.

Can I upload more than 1 document from Clio to First Connect in an eFiling order?

Yes. Multiple documents can be loaded into First Connect from Clio in the same way that you are able to upload multiple documents from your local computer.

What types of files are supported by the integration? Will the portal convert my Microsoft Word files to PDF?

All document types currently supported by the portal for upload from your local computer are also supported for upload from Clio including PDF, MS Word, Rich Text Files, and many others. Any file that is not a PDF will be automatically converted to PDF by the portal before being submitted to the court.

