



Clio Instructions and Information

In order to better serve our clients, Siemann & Associates utilizes the Clio system, a law practice management software meant to be more convenient and encourage collaboration between attorneys and clients.

Clio uses a system called Clio Connect, which comes at no-cost to you, and allows you immediate access to important documents pertaining to your case file and your billing file. Clio Connect also allows you to send secure messages to staff at Siemann & Associates. Sign-up is a quick and easy process. You will receive an email from us, which will include a link and instructions on how to complete registration. Upon registration, you will be asked to create a personal password. From that point forward, you will have secure access to your account, which will include courtesy copies of important case documents and billing information. Clio Connect uses SSL encryption and bank-level security, so you can be sure that any information sent through Clio Connect is secure. This will ensure further attorney-client privilege. Each time a new document is uploaded, you will be informed via email, so that you may have immediate access and responses on your case.

In addition, you will be able to review and pay your bills through the Clio service. Bills will be sent to you by email, and each bill will contain a link that will allow you to remit payment, securely, through PayPal, if you chose to pay via credit card. We also accept payments via cash and check.

All of your invoices and all important documents related to your case will be shared through Clio Connect, so make sure to check your email often once you register for this free service. We also suggest that you check your spam folder, prior to adding Clio to your address book, to ensure that no emails are sent there. Finally, we ask that you write down your username and password in a secure location, in case you forget. We have provided space at the bottom of this letter for you to do so.

Of course, we understand that some clients do not have email accounts or easy access to a computer. While we encourage you to set-up a free email account, available through many online services, to take advantage of this convenient service, we are more

than willing to work with your circumstances. Should you wish to opt out of using Clio Connect and be sent your documents via regular U.S. mail, please inform us in writing, and we will be more than happy to accommodate your request.

Should you have any questions or concerns regarding the Clio system, please do not hesitate to contact our office and we would be happy to assist you in any way we can.

My Personal Clio Username is: _____

My Personal Clio Password is: _____