

Highlight “Matters” in the top menu to display the list of Matters for which you have permission (which should be at the moment All-Class, All-DV, Class-[YourName], DV-Price, and Field-[YourName])

The screenshot shows the Clio web application interface. The top navigation bar is blue with the Clio logo and the text "Fundamentals of Law Practice - Georgia Stat...". The "Clio Apps" logo is on the right. Below the navigation bar is a dark grey menu with the following items: Practice, Calendar, Tasks, Matters (highlighted), Contacts, Activities, Bills, Accounts, Documents, and Communications. Below the menu, there are sub-menu items: View, Edit, Add Task, Clio Connect, Quick Bill, and Delete. The main content area displays a list of four matters:

<input type="checkbox"/>	<u>Class-White</u>	<u>FLP-15S</u> Class work for Ivy White.	Classwork	12/10/2014		
	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Add Task</a>	<a href="#">Clio Connect</a>	<a href="#">Quick Bill</a>	<a href="#">Delete</a>
<input type="checkbox"/>	<u>DV-Price</u>	<u>Renee Price</u> Simulated domestic violence matter.	Domestic Violence	01/15/2015		
	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Add Task</a>	<a href="#">Clio Connect</a>	<a href="#">Quick Bill</a>	<a href="#">Delete</a>
<input type="checkbox"/>	<u>Field-Cohen</u>	<u>Misha Cohen</u> Fieldwork for Misha Cohen.	Fieldwork	12/14/2014		
	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Add Task</a>	<a href="#">Clio Connect</a>	<a href="#">Quick Bill</a>	<a href="#">Delete</a>
<input type="checkbox"/>	<u>Field-Connor</u>	<u>Sharon Connor</u> Fieldwork for Sharon Connor.	Fieldwork	12/10/2014		
	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Add Task</a>	<a href="#">Clio Connect</a>	<a href="#">Quick Bill</a>	<a href="#">Delete</a>

On the right side of the interface, there is a calendar widget showing the current date (1/30/2015) and a section titled "AGENDA" with the text "09:00 AM FLP at Jus". The bottom of the screenshot shows the Windows taskbar with various application icons and the system clock.

Click on Field-[YourName] to open that Matter.

The screenshot shows the Clio web application interface. At the top, there is a blue header with the Clio logo and the text "Fundamentals of Law Practice - Georgia Stat...". To the right of the header, there are links for "Clio Apps", a help icon, and a user profile picture. Below the header is a dark navigation bar with tabs for "Practice", "Calendar", "Tasks", "Matters", "Contacts", "Activities", "Bills", "Accounts", "Documents", and "Communications". The "Matters" tab is currently selected.

Below the navigation bar, there is a notification banner that reads: "TRUSTe added some clarifying terms to our Privacy Policy. To review, click [here](#)".

The main content area displays the matter name "Field-Cohen" in large bold text. To the right of the name are five buttons: "CLIO CONNECT" (green), "QUICK BILL" (blue), "EDIT" (blue), "DELETE" (blue), and "CLOSE MATTER" (blue). Below the name, there is a description: "Fieldwork for Misha Cohen."

Below the description is an "Info" section with a horizontal menu of tabs: "Client", "Transactions", "Contacts", "Tasks", "Calendar", "Notes", "Time", "Expenses", "Documents", "Communications", and "Clio Connect". The "Client" tab is currently selected.

Below the "Info" section is a "Matter Detail" section. It contains a table with the following data:

Client Reference Number	Field-Cohen	Status	Open

On the right side of the interface, there is a calendar widget showing the current date as 1/30/2015 and the time as 3:51 PM. Below the calendar is an "AGENDA" section with a scheduled event: "09:00 AM FLP at Jus".

The bottom of the screenshot shows the Windows taskbar with various application icons and the system tray.

Click on Contacts (INSIDE your Fieldwork Matter, NOT on the top of the screen) to make sure that all relevant contact information for your fieldwork has been entered in Contacts in Clio and related to your fieldwork matter, such as contact details for your fieldwork attorney and any staff persons at the firm who are involved in co-ordinating your interactions with the fieldwork attorney.

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A notification banner at the top of the matter page reads: "TRUSTe added some clarifying terms to our Privacy Policy. To review, click [here](#)".

The main content area displays the matter name "Field-Cohen" and several action buttons: "CLIO CONNECT" (green), "QUICK BILL" (blue), "EDIT" (blue), "DELETE" (blue), and "CLOSE MATTER" (blue). Below this, the description "Fieldwork for Misha Cohen." is visible.

A navigation bar below the description includes links for "Info", "Client", "Transactions", "Contacts" (highlighted), "Tasks", "Calendar", "Notes", "Time", "Expenses", "Documents", "Communications", and "Clio Connect".

The "Relationships" section is shown with an "ADD" button (green) and a "Filter" dropdown menu.

At the bottom, a table header is visible with columns: "Description", "Contact", "Phone", and "Email".

The browser's address bar shows the URL: <https://app.goclio.com/matters/1027406145>. The taskbar at the bottom of the screen shows various application icons and the system clock indicating 3:52 PM on 1/30/2015.

Click on Tasks (INSIDE the matter) to make you have posted ALL tasks that you need to complete all the way up to final submission of your fieldwork report with due dates. Be thorough in thinking of tasks: for example, if you are waiting to hear back from your attorney to confirm a date for your first meeting, give yourself the Task of following up with that attorney by a particular date.

The screenshot shows the Clio web application interface. At the top, there is a blue header with the Clio logo and the text "Fundamentals of Law Practice - Georgia Stat...". To the right of the header, it says "Clio Apps" and has a help icon and a user profile picture. Below the header is a dark navigation bar with tabs for "Practice", "Calendar", "Tasks", "Matters", "Contacts", "Activities", "Bills", "Accounts", "Documents", and "Communications". The "Tasks" tab is currently selected. Below the navigation bar, there is a section for "Fieldwork for Misha Cohen" with a "Clio Connect" button. Underneath, there are tabs for "Info", "Client", "Transactions", "Contacts", "Tasks", "Calendar", "Notes", "Time", "Expenses", "Documents", "Communications", and "Clio Connect". The "Tasks" tab is active. In the "Tasks" section, there are "EXPORT" and "ADD" buttons. Below this, there are filter options: "All", "Due This Week", "Due Today", "Due Tomorrow", and "Overdue". The "All" filter is selected. A "Filter" dropdown menu is visible on the right. At the bottom, there is a table header with columns for "Date", "Task", and "Description". On the right side of the screen, there is a calendar widget showing the current date as 1/30/2015 and an "AGENDA" section with a time slot for "09:00 AM" and the text "FLP at Jus".

To post Tasks to your Matter, click on the green **ADD** button, which will open up the following dialogue box. Make sure you change the “Due at” date from today’s date to the deadline date and use the Assignee Dropdown menu to select your name to assign the task to yourself. You can set Priority at three different levels. Make sure you click **Save Task** or you have more than one task to post, **Save & Add Another**

The screenshot shows the Clio web application interface with the 'Add Task' dialog box open. The dialog box is titled 'Add Task' and contains the following fields and options:

- Task Name:** Email signed agreement to instructors, cc Fieldwork (required)
- Due at:** 02/05/2015 (Due in)
- Description:** Deadline is Feb 6
- Assignee:** Firm User: Misha Cohen (required)
- Priority:** High
- Matter:** Field-Cohen

At the bottom of the dialog box, there are three buttons: 'Save Task' (green), 'Save & Add Another' (blue), and 'Cancel' (grey). The background shows the Clio interface with a navigation menu and a sidebar.

Select Time to make sure you have recorded ALL the time expended on your fieldwork. Do NOT record fieldwork time to your Class-Name Matter. If you have already recorded a time entry in Class-Name, you can open that time entry and change the Matter to Field-Name to move it to the correct Matter. Use the green **ADD** button to post time entries

The screenshot shows the Clio web application interface. At the top, there is a blue header with the Clio logo and the text "Fundamentals of Law Practice - Georgia Stat...". To the right of the header, it says "Clio Apps" and has a help icon and a user profile picture. Below the header is a dark navigation bar with tabs for "Practice", "Calendar", "Tasks", "Matters", "Contacts", "Activities", "Bills", "Accounts", "Documents", and "Communications". The "Matters" tab is selected.

Below the navigation bar, there is a notification bar that says "TRUSTe added some clarifying terms to our Privacy Policy. To review, click [here](#)".

The main content area shows the details for a matter named "Field-Cohen". There are five buttons: "CLIO CONNECT" (green), "QUICK BILL" (blue), "EDIT" (blue), "DELETE" (blue), and "CLOSE MATTER" (blue). Below these buttons, the text "Fieldwork for Misha Cohen." is displayed.

Below the text, there is a horizontal menu with options: "Info", "Client", "Transactions", "Contacts", "Tasks", "Calendar", "Notes", "Time" (which is selected and underlined), "Expenses", "Documents", "Communications", and "Clio Connect".

Below the menu, there is a section titled "Time Entries" with a green "ADD" button on the right. At the bottom right of this section, there is a "Filter" dropdown menu.

On the right side of the screen, there is a sidebar with a calendar view showing dates from 28 to 1, and an "AGENDA" section with the text "09:00 AM FLP at Jus".

The Windows taskbar is visible at the bottom of the screen, showing various application icons and the system clock displaying "4:28 PM 1/30/2015".



Select Documents (INSIDE the matter) to make sure all documents related to your Fieldwork are posted: e.g. signed Fieldwork Agreement. (If you gave your signed agreement to us to scan and post, create a Task to check and remind us if it hasn't been posted.)

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Below the navigation bar, there is a notification bar that says "TRUSTe added some clarifying terms to our Privacy Policy. To review, click [here](#)".

The main content area shows the matter name "Field-Cohen" in large bold text. To the right of the name are several action buttons: "CLIO CONNECT" (green), "QUICK BILL" (blue), "EDIT" (blue), "DELETE" (blue), and "CLOSE MATTER" (blue). Below the name, it says "Fieldwork for Misha Cohen."

Below this, there is a horizontal menu with options: "Info", "Client", "Transactions", "Contacts", "Tasks", "Calendar", "Notes", "Time", "Expenses", "Documents" (which is underlined and bolded), "Communications", and "Clio Connect".

Below the menu, there is a section titled "List Documents" with an "ADD" button and a "Filter" dropdown menu.

At the bottom, there is a table header with columns: "Description", "Category", "Latest Edit", "Author", and "#".

The browser's address bar shows the URL "https://app.goclio.com/matters/1027406145". The Windows taskbar at the bottom shows various application icons and the system clock indicating 4:29 PM on 1/30/2015.

Select Communications (INSIDE the matter) to make sure all email related to your Fieldwork has been copied to this Matter using the [@maildrop.goclio.com](mailto:@maildrop.goclio.com) email address generated by clicking on **EMAIL COMMUNICATIONS TO THIS MATTER** At this point, only use the email address you use for logging-in to Clio for email that is to be copied to Clio, including your Fieldwork emails.

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