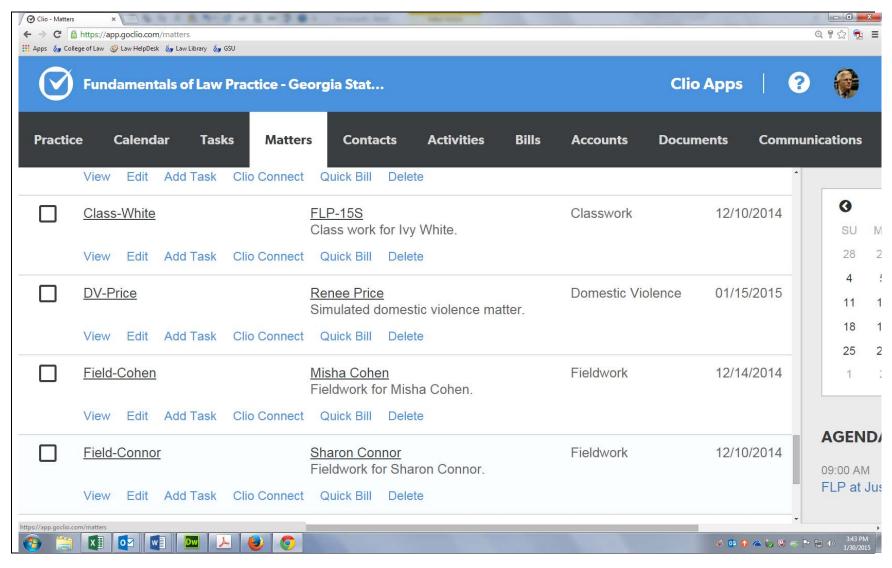
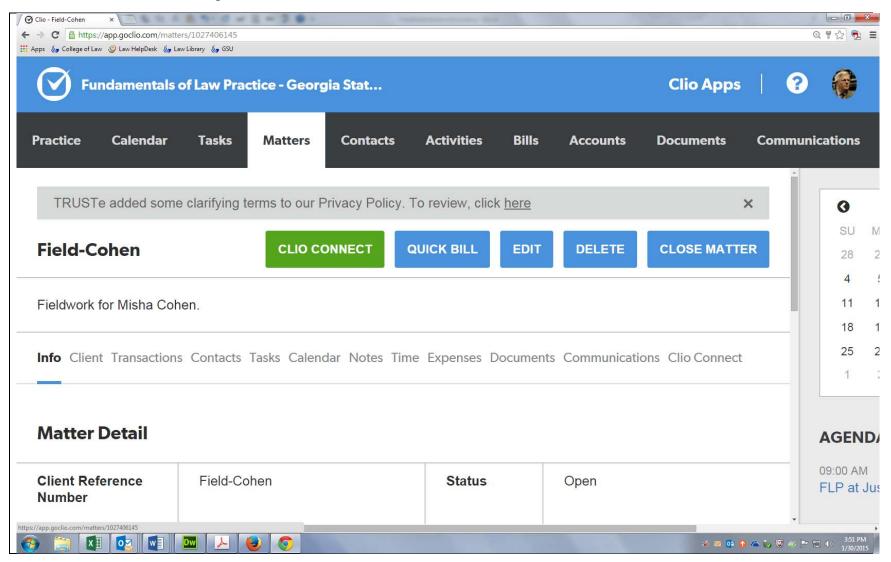
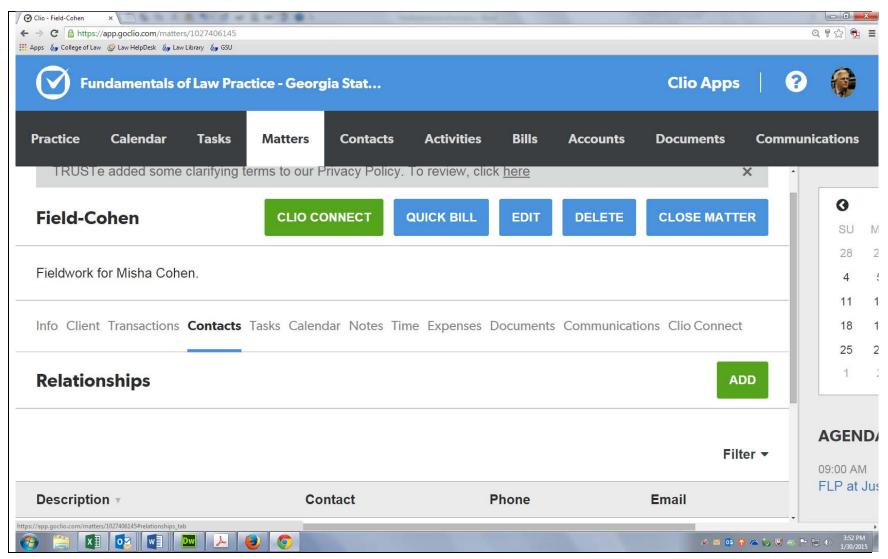
Highlight "Matters" in the top menu to display the list of Matters for which you have permission (which should be at the moment All-Class, All-DV, Class-[YourName], DV-Price, and Field-[YourName]



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



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.



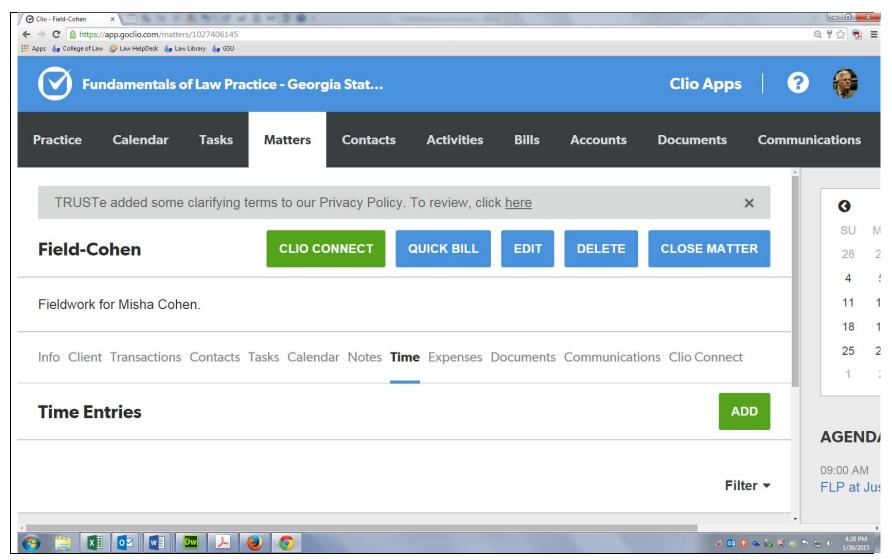
Click on Tasks (INSIDE the matter) to make you have posted ALL tasks that you need to complete all the way up to final submission of your fieldwork report with due dates. Be thorough in thinking of tasks: for example, if you are waiting to hear back from your attorney to confirm a date for your first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

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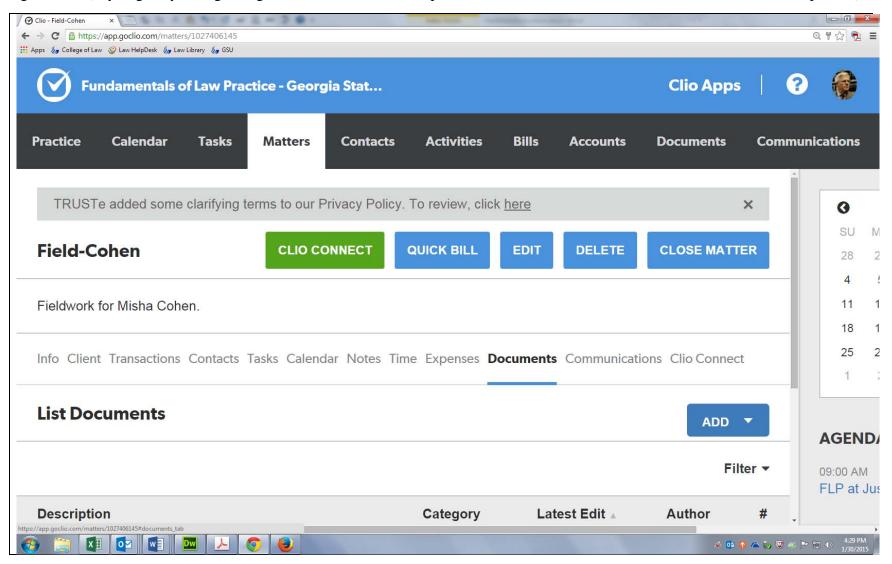
To post Tasks to your Matter, click on the green **ADD** button, which will open up the following dialogue box. Make sure you change the "Due at" date from today's date to the deadline date and use the Assignee Dropdown menu to select your name to assign the task to yourself. You can set Priority at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

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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



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.)



Select Communications (INSIDE the matter) to make sure all email related to your Fieldwork has been copied to this Matter using the <u>@maildrop.goclio.com</u> email address generated by clicking on <u>EMAIL COMMUNICATIONS TO THIS MATTER</u> 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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