

## Overview

The Clio integration for Countrywide Process streamlines the movement of documents and expenses 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 and expenses for eFiling orders in the following ways:

1. When placing an eFiling order, documents can be loaded into the Countrywide Process 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 Countrywide Process .
2. 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.
3. Additionally, billing data from submitted Countrywide Process eFiling orders are also populated and saved within both the Clio and Countrywide Process accounts, simplifying expense reconciliation and invoicing for the law firm.

## Activating and Using the Countrywide Process and Clio Integration

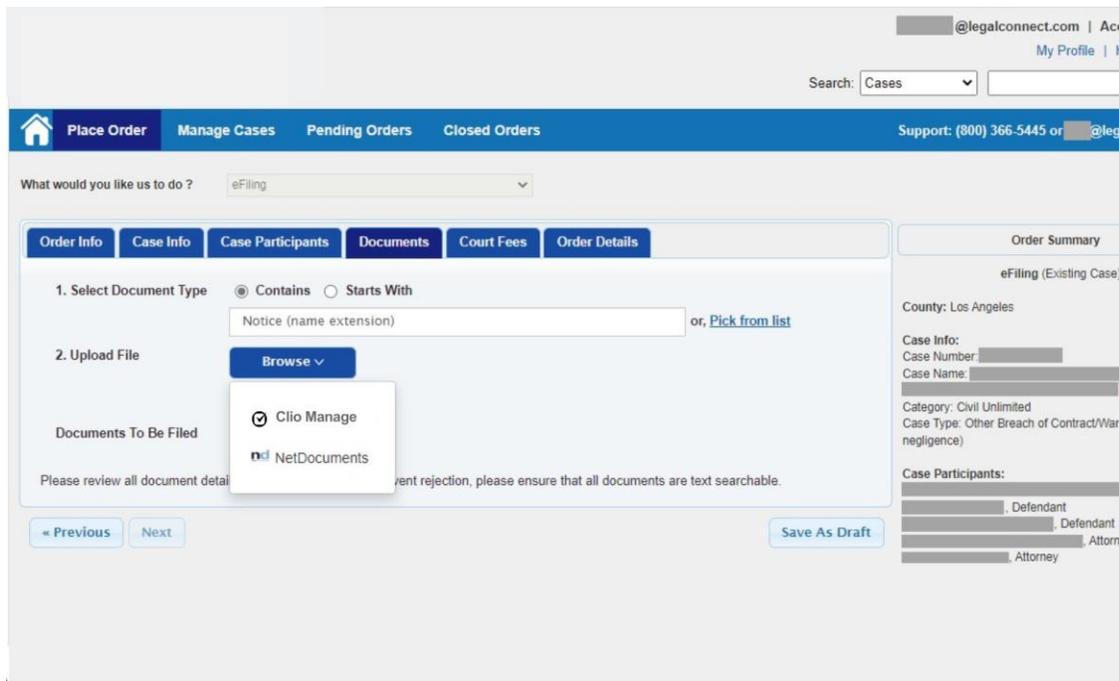
### Enabled for Service Providers

The Clio integration must be enabled for the Countrywide Process portal. Once enabled, all customers who log into Countrywide Process's portal will see the Clio option when uploading a document to an eFiling order, but only customers with a Clio account can make the connection and use the integration.

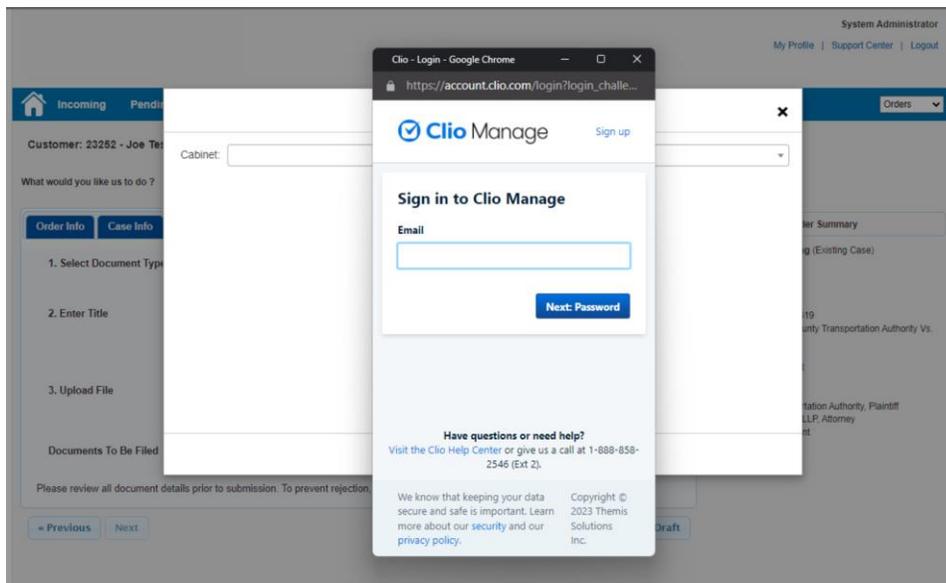
### Connecting Clio to Countrywide Process

When the Clio integration is enabled, you will see the Clio option on the Documents tab when placing an eFiling order. After selecting to upload a file from Clio, you will be prompted to make the connection.

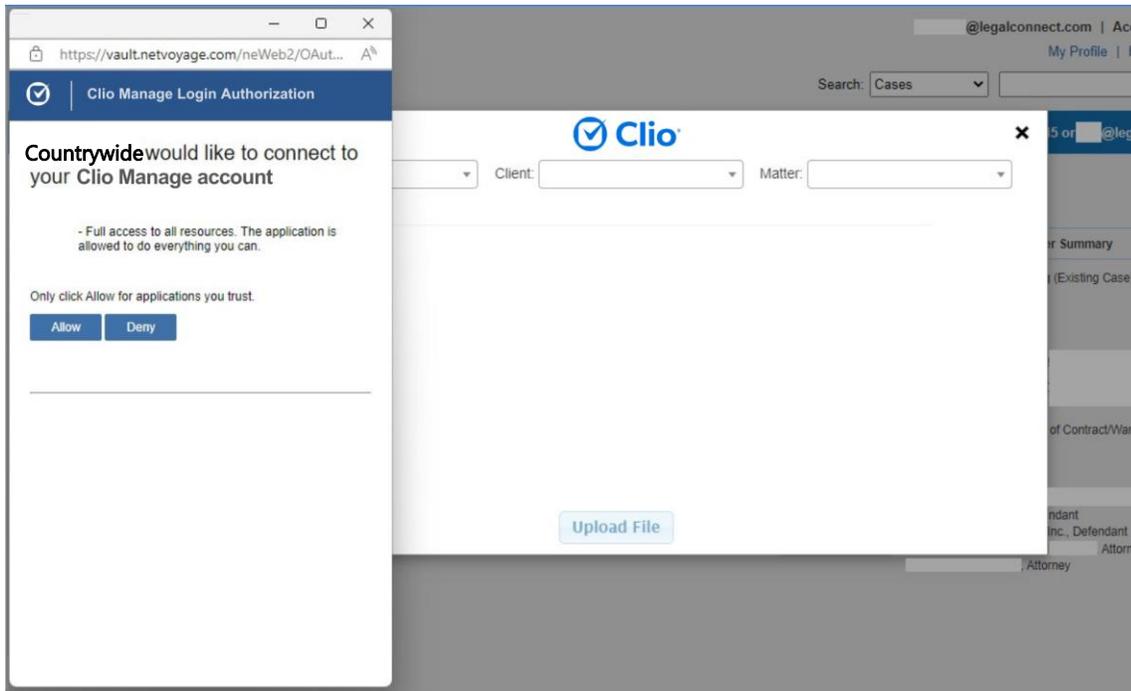
1. From the "Documents" tab of an eFiling order, after selecting a Document Type, click the "Browse" button then "Clio".



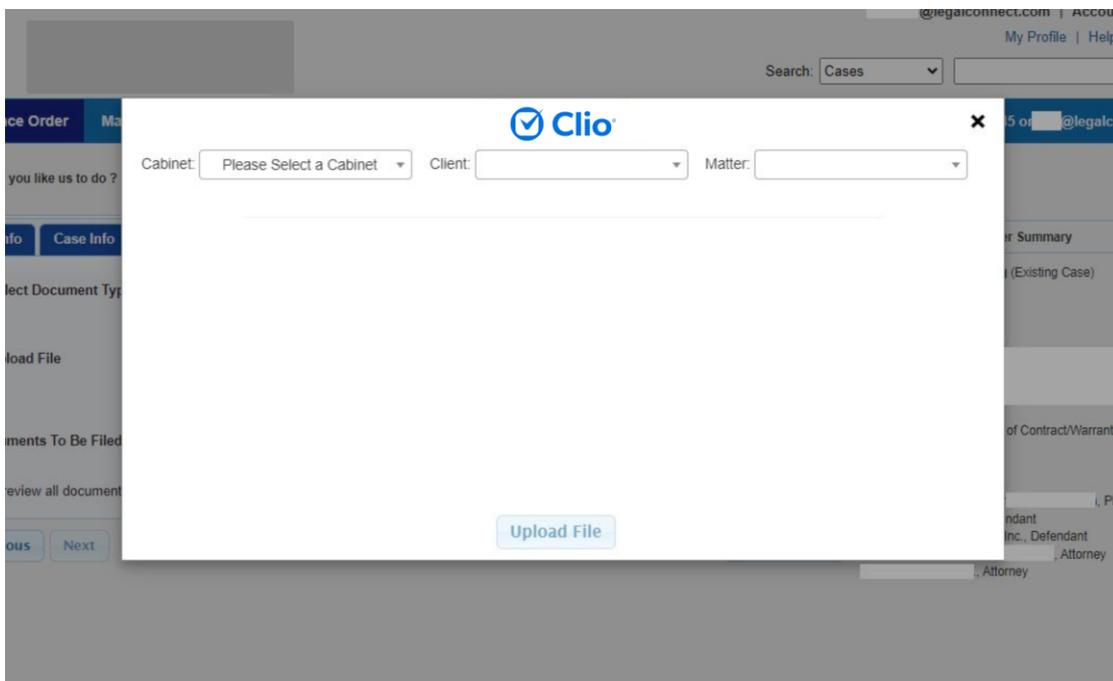
2. A pop-up window will open asking you to enter your Clio credentials.



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

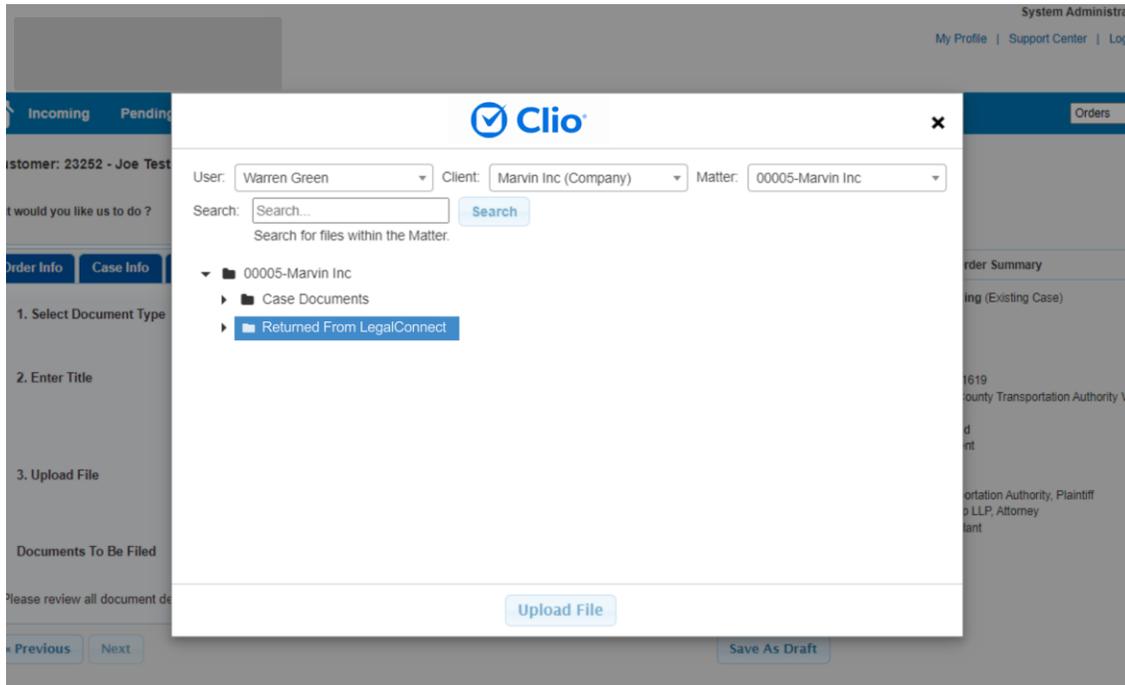


4. Once the connection is allowed, the pop-up window closes, and you return to the Countrywide Process order workflow and see the Clio file selection window.

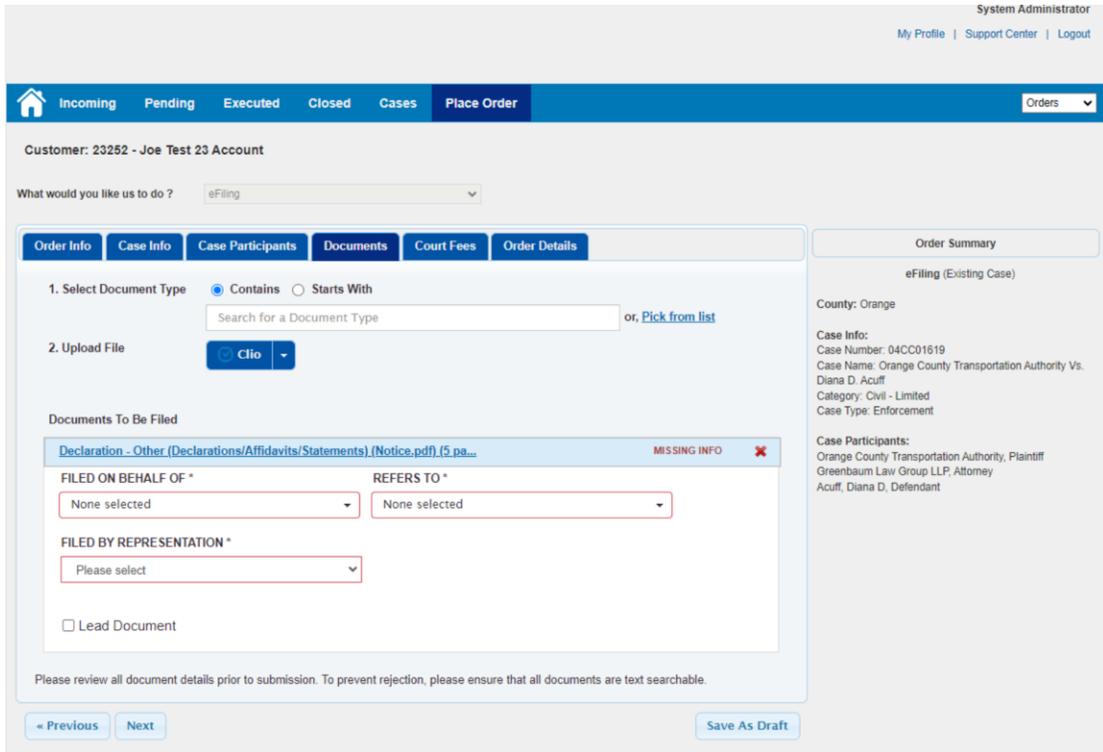


## Uploading a Document to Countrywide Process from Clio

5. After establishing the connection between Countrywide Process 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 Countrywide Process, 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.

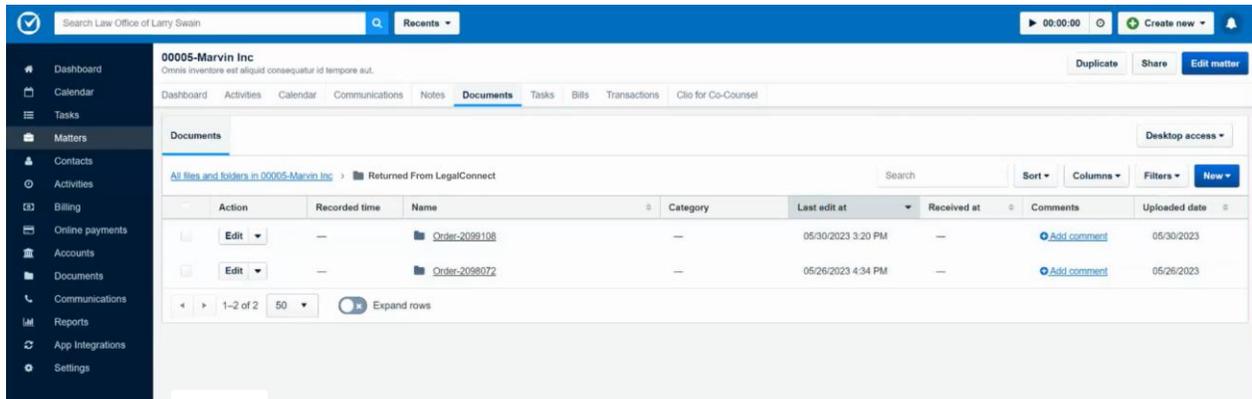


## Viewing Documents Returned from the Court

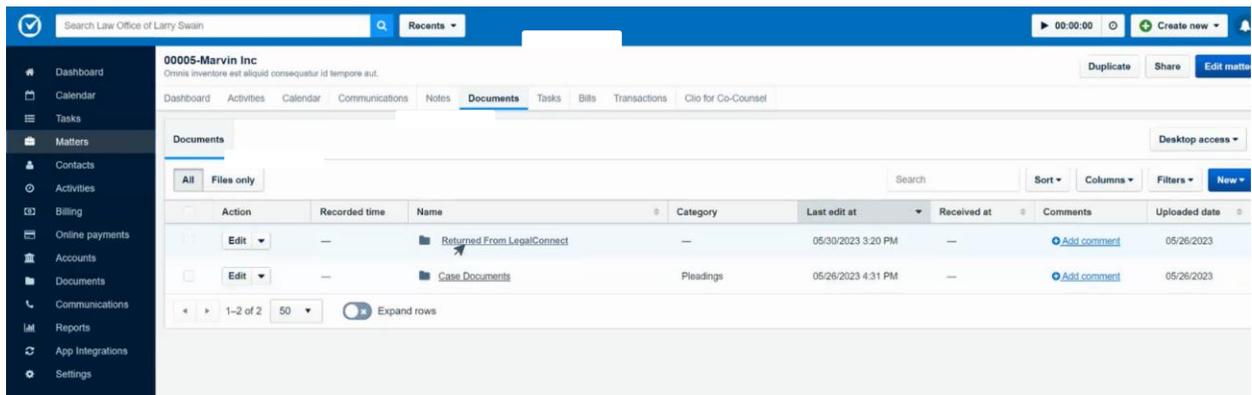
When utilizing the integration between Clio and Countrywide Process, all standard Countrywide Process functionality for court-returned documents is still available. Court-returned documents will be viewable in the “Deliverables” tab of the Countrywide Process order, and you will receive the email from Countrywide Process 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.

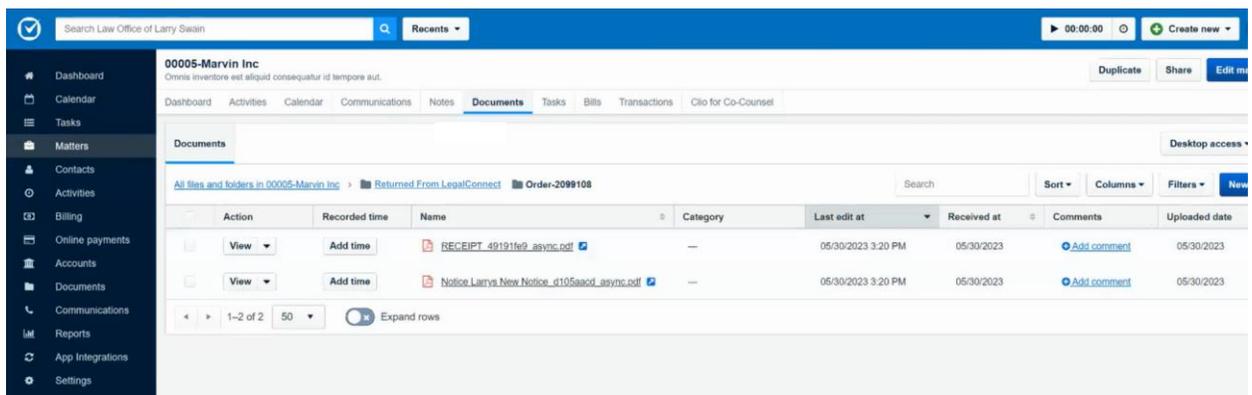
1. Log into your Clio account and navigate to the Client and Matter you selected when submitting the eFiling order in Countrywide Process. Locate the folder named “Returned from Service Provider” where “Service Provider” is Countrywide Process, whose portal you used to submit the eFiling order.



- In the "Returned from Service Provider" folder you will see a list of all Countrywide Process orders submitted under this Client and Matter. Locate the proper folder by matching the Order Number assigned when the eFiling order was submitted in Countrywide Process.



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



## Viewing Invoices and Expenses

Billing/expense data from the Countrywide Process eFiling orders are also populated and saved within your Clio account. On the “Activities” page, you can view and edit expenses from your eFiling order.

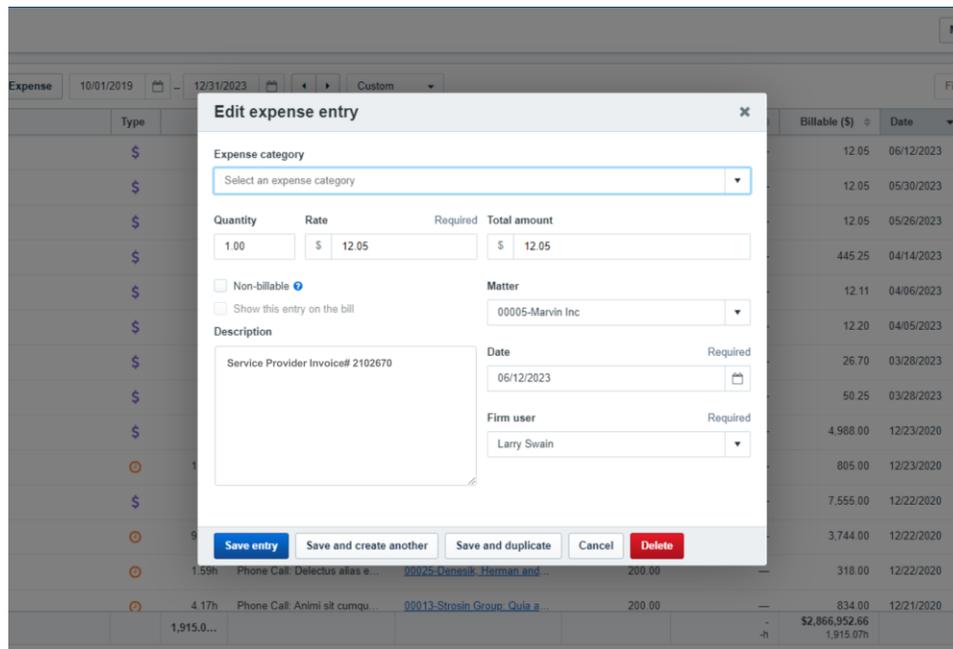
1. To view invoicing data and edit expense entries, click on the “Activities” button on the left-hand side of the portal. On this page, you will see the expenses related to the particular eFiling order. You can navigate your eFiling expenses by their matter, date, or type as well as check the status of a particular expense’s invoice.

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

2. 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
<a href="#">Edit</a>	\$	1.00	LegalConnect Invoice# 208516	00005-Marvin Inc. Omnis Inv...	12.05	—	12.05	05/30/2023	Larry Swain	Unbilled
<a href="#">Edit</a>	\$	1.00	LegalConnect Invoice# 208514	00005-Marvin Inc. Omnis Inv...	12.05	—	12.05	05/26/2023	Larry Swain	Unbilled
<a href="#">Edit</a>	\$	1.00	LegalConnect Invoice# 208552	00064-QA_QA	445.25	—	445.25	04/14/2023	QA TEAM	Unbilled
<a href="#">Edit</a>	\$	1.00	LegalConnect Invoice# 208560	00001-DevMatter/UT_DevMat...	12.11	—	12.11	04/06/2023	QA TEAM	Unbilled
<a href="#">Edit</a>	\$	1.00	LegalConnect Invoice# 208574	00001-DevMatter/UT_DevMat...	12.20	—	12.20	04/05/2023	Andy E	Unbilled
<a href="#">Edit</a>	\$	1.00	LegalConnect Invoice# 208519	00001-DevMatter/UT_DevMat...	26.70	—	26.70	03/28/2023	Andy E	Unbilled
<a href="#">Edit</a>	\$	1.00	LegalConnect Invoice# 208523	00001-DevMatter/UT_DevMat...	50.25	—	50.25	03/28/2023	Andy E	Unbilled
							\$570.61	-h		

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



## Frequently Asked Questions

### 1. How do I connect to my Clio account?

- a. 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.

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

- a. The length of time that the connection between Countrywide Process 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.

### 3. Does the email address in my Countrywide Process account need to match the email address in my Clio account?

- a. No. Your Clio email and password do not need to match your Countrywide Process email and password. If your Clio credentials are valid the connection will be established.

### 4. Can I upload more than 1 document from Clio to Countrywide Process in an eFiling order?

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

**5. What types of files are supported by the integration? Will Countrywide Process convert my Microsoft Word files to PDF?**

- a. All document types currently supported by Countrywide Process 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 Countrywide Process portal before being submitted to the court.