SHILTS | CPA

COMPREHENSIVE SOLUTIONS

Clio for Clients
and How to Use It

Clio for Clients is a portal designed for Firms like us and our clients, easily and securely allowing us communicate as well as share documents. We can send documents and share key details like status and next steps for your matter from the Clio for Clients mobile app or web app. You will also be able to scan and share documents, access your matter details in one central spot, and message our team when needed.

Getting Started & Logging In

1. When Shilts CPA emails you an invite to Clio for Clients, you will be prompted to open the web app or download the mobile application. You'll be able to access your account from either location at any time.
2. Logging in to Clio for Clients does not require a password, instead, it is authenticated by your email address. When you receive an invite or notification email it will contain a link that is accessible for one (1) hour. If you access the link more than one (1) hour after it was received you will be automatically prompted to request a new access link using the email address associated with your account when logging in. Find out more here.
3. Once you are logged in to the portal you can review any documents, folders, or messages that we have shared with you.

Sending Messages

Once Logged in you can access the messages section which will allow you to communicate with our firm.

Sending Documents

The method of sharing documents with us is dependent upon whether if you are on the Mobile App or Web App.

Mobile App:

1. Click the **Send Document** button

2. Choose a method to upload the file (scan document, take photo, browse photos, browse files)
3. Add a message if desired
4. Update the file name (optional)
5. Upload to the **Client Uploaded Files** folder
6. Send

Web App:

1. Navigate to the **Documents** tab
2. Click the **Send Document** button
3. Choose the desired file
4. Add a message (optional)
5. Upload to the **Client Uploaded Files** folder
6. Send

Logging Out

To keep your data secure you will be logged out after 15 minutes of inactivity. However, you can access your account at any time to review your case or communicate with the firm.

Additional Learning

Clio for Clients App Overview (Video Instructions)
Using Clio for Clients (Video Instructions)

Contact

For additional information, call us at (844) 850-6166, email us at administration@shiltscpa.com, or visit us at www.shiltscpa.com.