

# Clio Connect (Clio for Co-Counsel) and How to Use It

*Clio for Co-Counsel, formerly known as Clio Connect, is a portal designed to allow us to communicate with Law Firms easily and securely. We can send documents and share key details like status and next steps the matter in question from the Clio Co-Counsel 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 shares resources via Clio Connect, you will receive an invite to register for your account.
2. Once you click on the hyperlink contained in the email, you will be prompted to enter your first name, last name, and a unique password. This will be your login credentials.
3. Once you are logged in to the portal at Visit [www.app.clio.com](http://www.app.clio.com):
  - The **Dashboard** provides an overview of everything Shilts CPA has shared with you.
  - The **Calendar** provides an overview of the meetings we have scheduled.
  - The **Tasks** contain any items we have assigned your Firm to be completed.
  - The **Documents** contain any files Shilts CPA or your Firm have shared.
  - **Bills** will allow you to review, download, and pay invoices.
  - **Communications** shows you direct and secure messages between us and allows you to reply and send new messages.

## Sending Documents

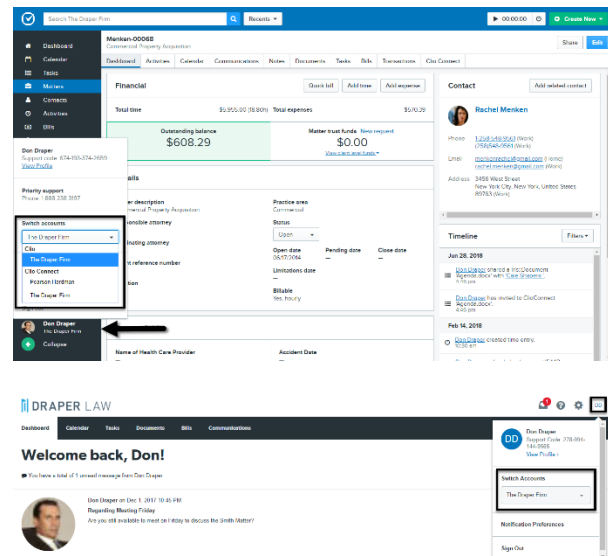
1. Navigate to the **Documents** tab
2. Click the **New** button
3. Choose the desired file or folder

## Receiving Documents

1. Navigate to the **Documents** tab
  - a. Click **Select All, Action** menu, and then **Download** to download all documents, or
  - b. Click the document hyperlink to download each individually

## My Firm already uses Clio Manage. How do I view shared documents from Shilts CPA?

You can switch between your Clio accounts using the following instructions: [How to Switch Between Clio Manage-Clio for Co-Counsel-Clio Connect](#)



## Additional Learning

[Clio Connect Overview](#) (Video Instructions)  
[How to Switch Between Clio Manage-Clio for Co-Counsel-Clio Connect](#) (For Law Firms Currently Using Clio)

## Contact



For additional information, call us at (844) 850-6166, email us at [admin@shiltscpa.com](mailto:admin@shiltscpa.com), or visit us at [www.shiltscpa.com](http://www.shiltscpa.com).