How to Send Us Your Documents

Law Office of Brian D. Shapiro, LLC · 702-386-8600

You can send us your papers from your phone or computer in 5 easy steps. It takes about 5 minutes.

We use a safe website called **Clio** for this. Think of it as a locked mailbox that only you and our office can open.

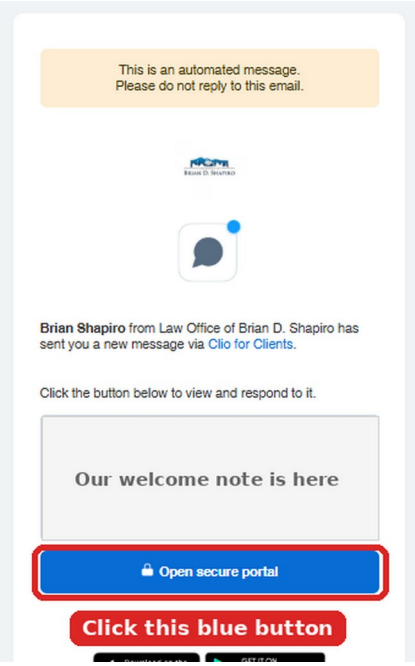
What you need:

- The email address you gave us
- Your papers, or clear photos of them on your phone

Step 1: Find our email

After you sign your fee agreement, we send you an email. It comes from **Clio**.

1. Open your email.
2. Look for an email from **Clio** with our logo on it. If you can't find it, look in your **spam** or **junk** folder.
3. Open the email and scroll down.
4. Click the blue button that says **Open secure portal**.

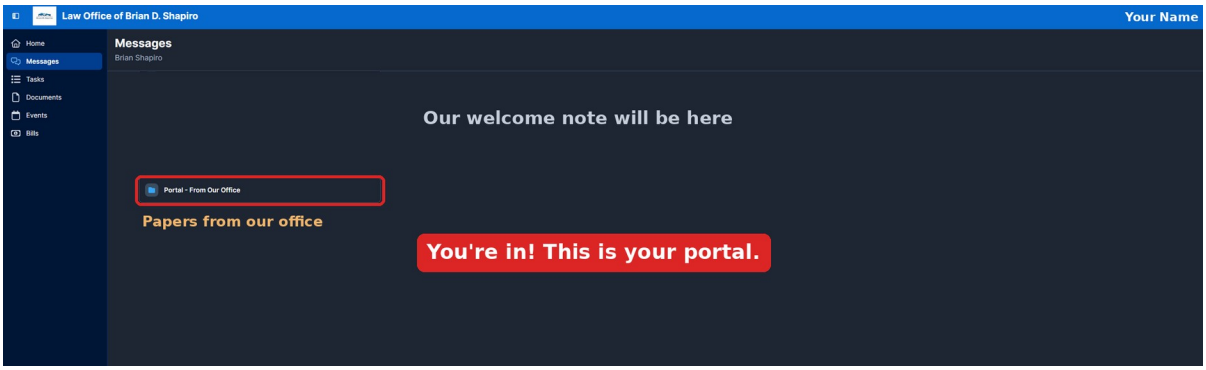


The blue button only works one time, and only for 1 hour. If it stops working, see "Next time you sign in" at the end of this guide.

Step 2: You’re in!

After you click the blue button, our secure portal opens. You do not need a password.

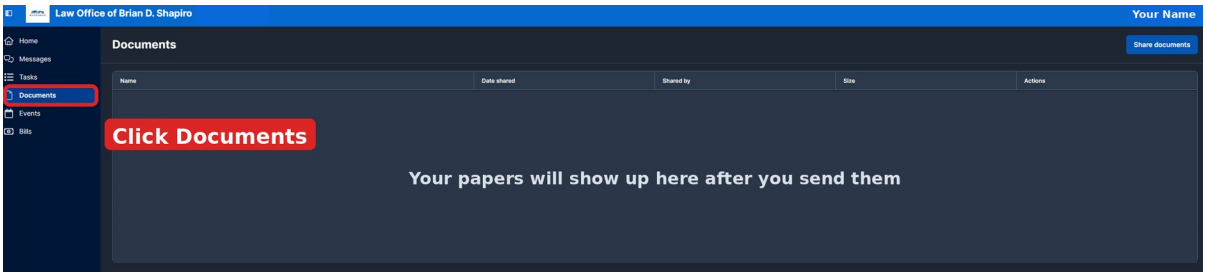
If you see a page with a **Continue** button first, just click **Continue**.



You will see our welcome note. Papers we send you are in the folder called **Portal - From Our Office**.

Step 3: Click Documents

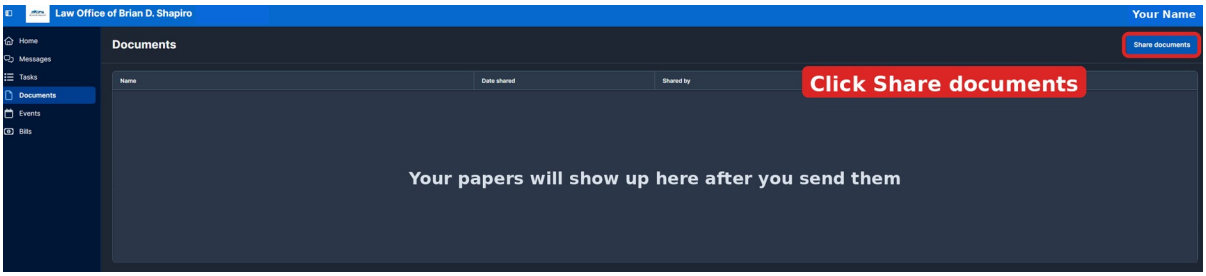
Look at the list on the **left side** of the screen. Click the word **Documents**.



On a phone, the list may be hidden. Tap the small menu button at the top left to see it.

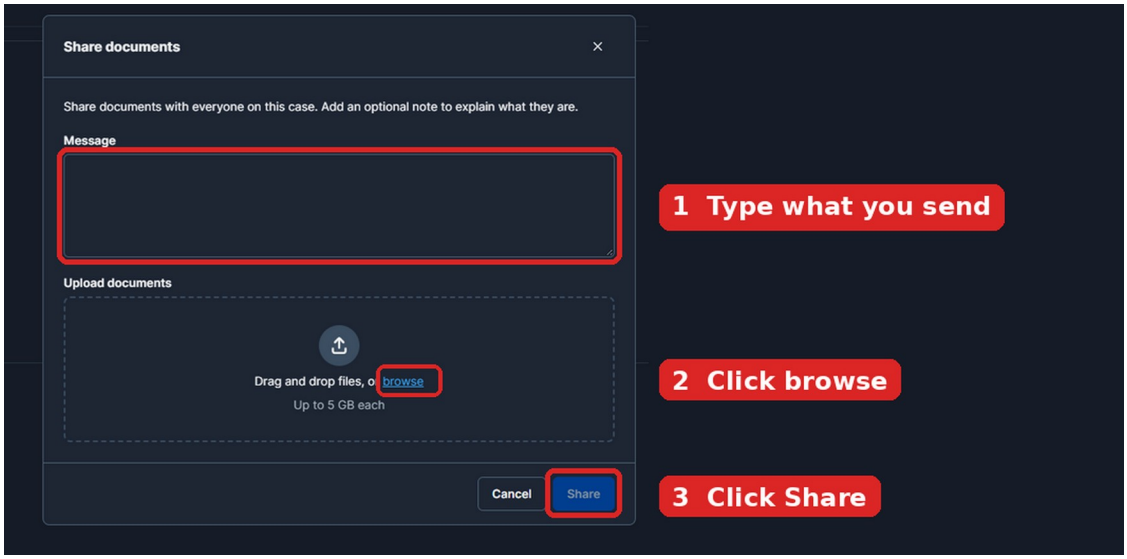
Step 4: Send your papers

Click the blue **Share documents** button at the **top right**.

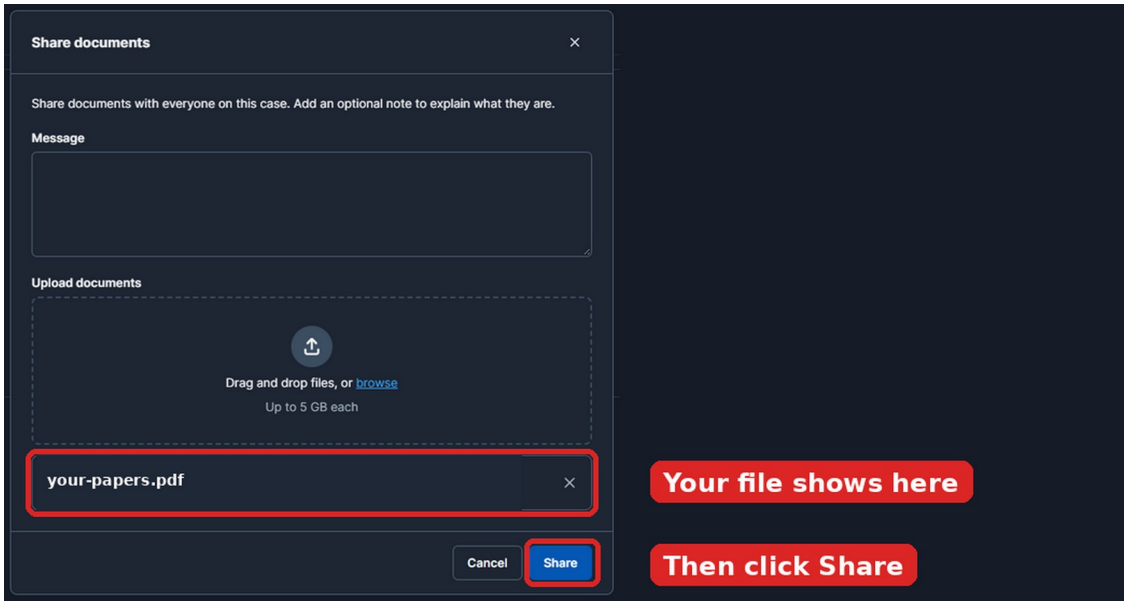


A box pops up. Now do these things:

1. In the **Message** box, type what you are sending. Example: *“My tax returns and my loan papers.”*
2. Click the blue word **browse**. Pick your papers from your phone or computer. You can pick lots of papers at one time.
3. Click **Share**.



Before you click Share, look at the bottom of the box. You should see the name of each paper you picked. If you picked the wrong one, click the **X** next to it.



> **Important:** After you click Share, a new screen opens. Click **Share** one more time to finish sending.

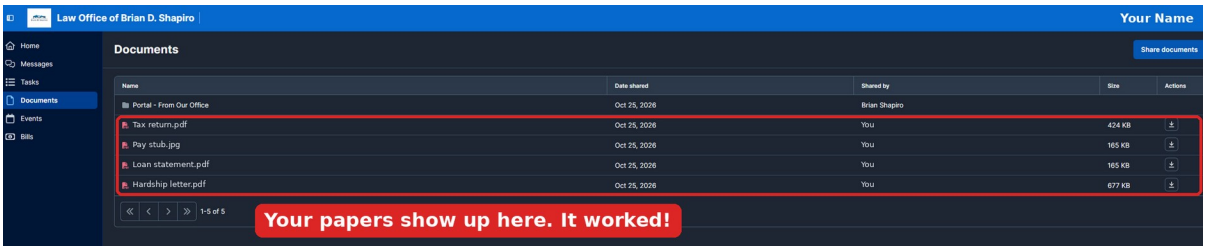
Tips:

- A clear photo from your phone is fine. Make sure we can read every word.

- Don’t worry about folders. Our office sorts your papers for you.
- You can come back and send more papers any time.

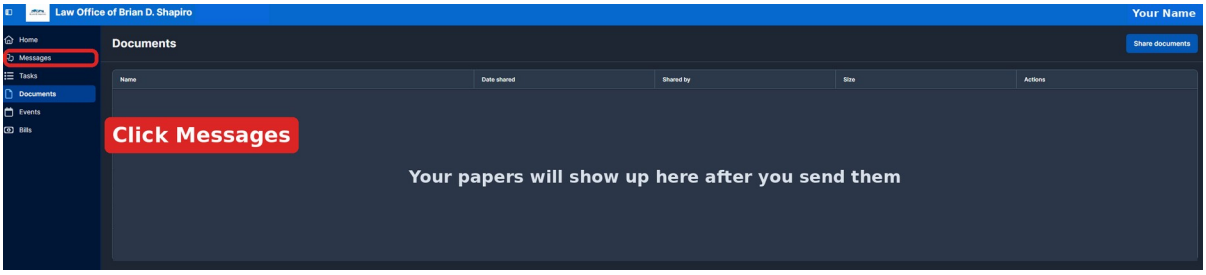
Step 5: You’re done!

Click **Documents** on the left. You will see each paper you sent in the list. That means it worked!



Mr. Shapiro’s office gets a notice that your papers came in. You don’t have to call or email us.

Want to ask us something? Click **Messages** on the left side, type your question, and click the send arrow.



Next time you sign in

The button in the first email only works once. To get back in later:

1. Go to **clients.clio.com/login**.
2. Type the same email address you gave us.
3. Check your email. Clio sends you a new sign-in button.
4. Click it. If you see **Continue**, click it too.

You can also get the free **Clio for Clients** app on an iPhone or Android phone.

Need help?

Call us at **702-386-8600**. We are happy to walk you through it.