ALH LAW GROUP

Don't Lose Your Answers!

How to fill out, save, and upload your questionnaire through the Clio Client Portal

! If you type your answers into a **preview window** (inside the portal, your web browser, or a phone), they are **not saved to the file**. When you upload, we receive a **blank form**. Follow these 5 steps to make sure your answers reach us.

1 Download the form to your computer first

In the Clio portal, click **Download** and save the file to your Desktop or Documents folder. Don't type into the preview that opens in the portal or your browser.

2 Open it in free Adobe Acrobat Reader

Right-click the file → **Open With** → **Adobe Acrobat Reader**. Don't have it? Download it free at **get.adobe.com/reader**. Avoid Mac Preview, Chrome, Edge, and Safari for filling in the form.

3 Fill it in, then "Save As" with a new name

Go to **File → Save As** and add your last name and "COMPLETED," for example `Smith - Questionnaire - COMPLETED.pdf`. Save often while you work.

4 Close it and reopen it to check

Close the file, then open your **COMPLETED** copy again. Your answers should still be there. If the form is blank, your answers were not saved; repeat Steps 2–3.

5 Upload the COMPLETED file

In the Clio portal, upload and choose the file with **COMPLETED** in its name, not the original download (that copy is still blank). Check the file name before you click Upload.

Do

- Use a laptop or desktop computer
- Use Adobe Acrobat Reader
- Save often, and reopen to check before uploading

Avoid

- Typing answers in a browser or portal preview
- Filling it in on a phone or tablet
- Uploading the file straight from your Downloads folder

Questions? We're happy to help.
Call us before you re-do any work.

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