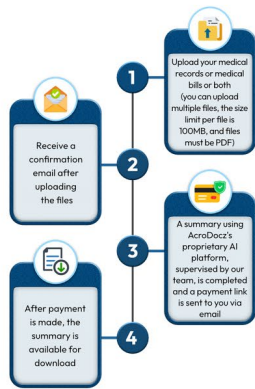
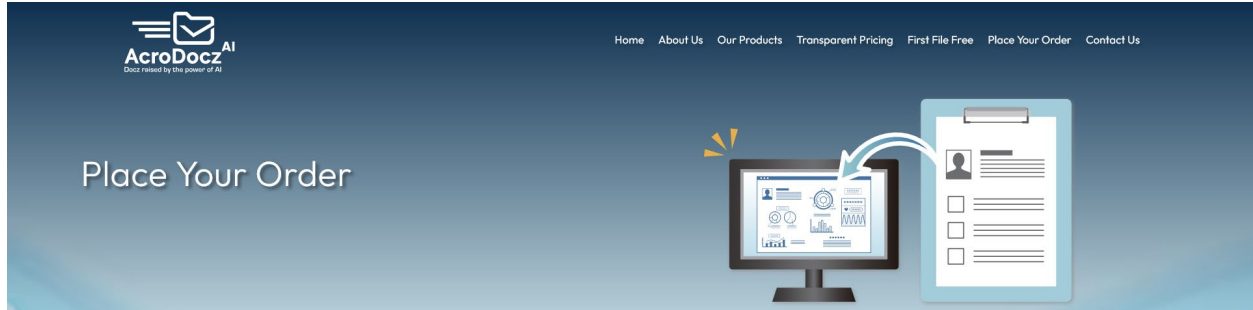


AcroDocz Clio App Instructions

1. Upon clicking on the AcroDocz app in Clio, and giving permission for AcroDocz to integrate with your Clio account, you will be taken AcroDocz's Place Your Order Page.



Try AcroDocz Now! F³ - First File Free!

Email*

First Name* Last Name*

Law Firm or Company Name*

Phone*

Document Section

Patient Name*

Summary Type

Medical Record Summary Medical Billing Summary

Drag & Drop your files here or click to upload

I have read and agree to the [Terms and Conditions of Use](#).

Submit



AcroDocz's highly accurate summaries give you the information and knowledge you need to achieve more successful results.

Try AcroDocz

INQUIRIES

66 Split Rock Road
Syosset, New York 11791
info@acrodocz.com

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- Place Your Order
- Contact Us



Is your firm subject to HIPAA?
If so, to request a Business Associate Agreement from AcroDocz, reach out to us at info@acrodocz.com.

2. At the Place Your Order page, input into the “Email” box the email address you used to log into your Clio account, and your information will automatically populate, and a dropdown menu containing a list of all of your Clio Matters will appear.

Email*

ai@acrodocz.com

First Name*

Sam

Last Name*

Karpel

Law Firm or Company Name*

Sam Karpel

Phone*

123456789

Document Section

Matter*

-Select-



Summary Type

3. From the Matter drop down menu, select a Matter that contains medical records or medical bill or both that you would like to provide AcroDocz for summary.

Document Section

Matter*

-Select- ▼

4. Once you select a Matter, a listing of the documents contained in that Matter will be available for you to check off which medical records or medical bills that you want to provide to AcroDocz for summary.

Document Section

Matter*

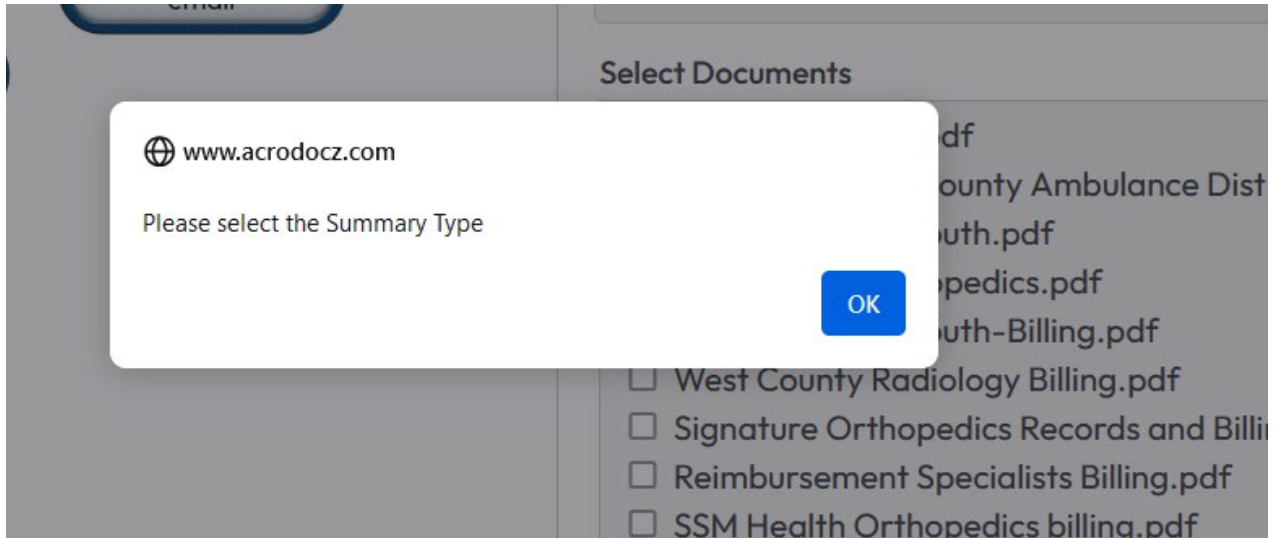
6Nov Test Patient ▼

Select Documents

- 24 7 Healthcare.pdf
- North Jefferson County Ambulance District.pdf
- Mercy Hospital South.pdf
- SSM Health Orthopedics.pdf
- Mercy Hospital South-Billing.pdf
- West County Radiology Billing.pdf
- Signature Orthopedics Records and Billing.pdf
- Reimbursement Specialists Billing.pdf
- SSM Health Orthopedics billing.pdf

5. Prior to checking off medical records or medical bills that you'd like AcroDocz to summarize, you will be prompted to select the type of summary you would like, i.e., a medical record summary or medical billing summary.

(You cannot upload both records and bills at the same time; rather, you must upload a set of records or set of bills first, and submit them to AcroDocz, and then you can upload the corresponding set of bills or records).



Check off either Medical Record Summary or Medical Billing Summary (after you submit the records or bills, you can then submit the corresponding bills or records).

Summary Type

Medical Record Summary Medical Billing Summary

6. Once you select the type of summary you'd like, read the Terms and Conditions of Use, and check off the box confirming you agree to them, and then click on "Submit".

Matter*

6Nov Test Patient

Select Documents

- 24 7 Healthcare.pdf
- North Jefferson County Ambulance District.pdf
- Mercy Hospital South.pdf
- SSM Health Orthopedics.pdf
- Mercy Hospital South-Billing.pdf
- West County Radiology Billing.pdf
- Signature Orthopedics Records and Billing.pdf
- Reimbursement Specialists Billing.pdf
- SSM Health Orthopedics billing.pdf

Summary Type

Medical Record Summary Medical Billing Summary

I have read and agree to the [Terms and Conditions of Use](#).

Submit

7. Once submitted, a notice will appear notifying you that the summarization of the records (or bills) has started, and that you will receive an email once completed.

I have read and agree to the [Terms and Conditions of Use](#).

Summarizing Medical Record has started. You will receive an email once completed.

Submit

8. Then, if you'd like corresponding bills (or records, if you first submitted bills) to be summarized, check off "Medical Billing Summary" (or check off "Medical Record Summary" if you first submitted bills) and then check off the bills (or records) that you would like summarized, and click "Submit".

Matter*

6Nov Test Patient

Select Documents

- 24 7 Healthcare.pdf
- North Jefferson County Ambulance District.pdf
- Mercy Hospital South.pdf
- SSM Health Orthopedics.pdf
- Mercy Hospital South-Billing.pdf
- West County Radiology Billing.pdf
- Signature Orthopedics Records and Billing.pdf
- Reimbursement Specialists Billing.pdf
- SSM Health Orthopedics billing.pdf

Summary Type

Medical Record Summary Medical Billing Summary

I have read and agree to the [Terms and Conditions of Use](#).

Summarizing medical bills has started. You will receive an email once completed.

Submit

9. Once submitted, a notice will appear notifying you that the summarization of the bills (or records) has started, and that you will receive an email once completed.

Summary Type

Medical Record Summary Medical Billing Summary

I have read and agree to the [Terms and Conditions of Use](#).

Summarizing medical bills has started. You will receive an email once completed.

Submit

10. Once the summary is completed, you will receive an email with an invoice to pay by credit card; and once paid, the summary will be placed into the Matter from which you provided AcroDocz with the records or bills.