Legal Hotline Quarterly

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*Web-Based Applications for Legal Services**

The legal services world is starting to actively embrace web-based applications for case management and other legal service delivery functions. As programs try to link offices together and programs across a state wish to standardize their case management and information sharing, they have come to realize accessing these applications over the web is less expensive and more easily supported than linking their programs through Wide Area Networks. Web-based applications can allow programs the use of sophisticated and expensive software which would be impossible for legal services programs or small law firms to acquire on their own.

Applications can be offered over the web at different levels. Some products use Application Service Providers (ASPs). This technology allows an application to run over the Internet with processing and data storage performed at the ASP's site on secure servers rather than housing the software and data at the program's site. These "hosted" applications can be accessed by any Internet-connected computer with a user access code.

Other legal services programs have opted to self-host the case management and other legal service applications by loading the software and storing the data on their own servers– at their own facility- acting, in effect, as their own ASPs. By using an in-house web server at their site, they can access the application over the web from any location.

**The Project does not recommend any particular product but provides this information in keeping with its mission to inform legal hotlines about available products, services and resources.*

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Another program created a Virtual Private Network(VPN) where the case management software runs over the Internet but can be accessed only by desktops (or notebooks) which have the VPN decryption software loaded.

Some of the products are web-enabled while some are actually web-based. A web-enabled product is usually one written in a non-web language such as Microsoft Access for use on standalone PCs, a LAN or WAN. This software is ***enabled*** to run over the web by using a Windows 2000 Terminal Server or a special server and remote-access technology offered by Citrix. A web-***based*** product is one written specifically to run on the Internet using a web language such as Java or Visual Basic and/or Active Server Pages, (confusingly called ASP too). Active Server Pages is a Microsoft server-side processing language that allows for dynamic content on web pages rather than just viewable static text or graphics. These technologies are more developed in the business world but their adoption by the legal community is still in the early stages.

As an introduction to ASPs we have reprinted below an article by John Paul Kemp. The *Legal Hotline Quarterly* editor also conducted in-depth interviews with organizations providing web-based applications in the legal hotline or legal services setting. These include Kemps Case Works, Tele-Lawyer, Inc., UAW Legal Services Plans, Western New York Law Center (TIME), RealLegal (Practice Manager), Pike Software and Probono.net.

We also interviewed a number of legal hotlines/legal services that are using or getting ready to implement web-based case management software. These include Legal Aid of Western Oklahoma, Central Florida Legal Services, Arkansas Center for Legal Services, Virginia Legal Aid, North Mississippi Rural Legal Services, Nebraska Legal Services, CARPLS, Pine Tree Legal Services in Maine, Indiana Legal Services and Maryland Legal Assistance Network. Glenn Rawdon at Legal Service Corporation provided information on this year's technology initiative grants. The *LHQ* owes a large debt of gratitude to these organizations for taking the time to explain their products and programs for this article. Special thanks go to Brandon Kaminsky at FusionStream.com for technical editing of the article.

Introduction to Application Service Providers

ASP / SQL Version

By John Paul Kemp (reprinted with permission from www.kempscaseworks)

We all use the equivalent of Application Service Providers (ASP), though we do not call them that. For example, employees often have to fly to distant locations. Yet, your office does not own an airplane or have pilots on staff. Rather, employees use an airline when they have to make a trip. The ASP, similarly, frees legal services offices from purchasing and maintaining complicated computer equipment and hiring someone to support it.

The computers that house the data and run the case management software are located at the ASP data center. Your office computers become, in effect, thin terminals when using the case management software over the Internet.

An ASP allows the staff of an office to reach case management from virtually any location using almost any computer. The speed of the application is almost completely independent of the equipment being used by the staff member. If that computer can run an Internet Browser, the staff member can get to their cases.

The ASP model offers many financial benefits. Compared with the total cost of ownership (TCO) of the software, network & hardware of an in-house WAN; the ASP offers a relatively low cost way of doing business.

The ASP not only replaces your case management software, but it also eliminates the need for a WAN for case management purposes. All you need is a connection to the Internet with sufficient speed. Purchasing computer hardware upgrades is required less frequently. Because the case management runs on the remote computers housed at the ASP, a computer upgrade is only necessary if other software in the office requires it.

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There are no WAN servers in the central or branch offices, so having a technical person on staff travel around to maintain them is not necessary. Your technical staff can concentrate on how the software works and helping advocates, rather than keeping the hardware up and running.

An ASP model is useful if you:

- Have multiple locations or telecommuters
- Are facing significant hardware or software upgrades
- Are tired of trying to hire computer people or it has become too costly
- Want to use case management from any device, at any location through the Internet
- Are unhappy with your network reliability and security (including getting backups done)
- You do not want to install and/or manage a Wide Area Network for case management

It is also useful if you want:

- Reduced overall costs for both management and hardware
- Seamless access to applications from remote offices and locations
- Faster application deployment and trouble-free upgrades
- An improved focus on what case management does, rather than maintenance and installation
- Your computer's speed to expand to match the size of your data (there is scalability)
- Enhanced security and redundancy
- To spread the cost out over time
- To be worry free about server and workstation setup
- High-speed performance independent of the computer being used
- Training and support to be handled centrally using "shadowing", eliminating the need for visiting each desktop to troubleshoot or install updates
- Low cost of entry and, commonly, an extremely short setup time
- A reduction or elimination of application administrative tasks
- Predictable application costs

Virtually any computer that will run an Internet Browser will work. This includes computers that run Windows, Unix, Linux, Macintosh and Windows CE. In addition, you need a connection to the Internet of sufficient bandwidth.

The processing {for Clients Case Management} is done on the Citrix Server at the ASP, which keeps the bandwidth requirements to a minimum. Only keystrokes and mouse-clicks are sent to the server. The server only returns screen updates. This keeps the transfer of information very low. The bandwidth requirement is from 12K to 20K per user. That means if you had five users in an office, you would need between 60K to 100K of bandwidth.

An office with a single location probably does not need an ASP, unless they wish to have all their applications at the ASP.

For more information about ASPs go to:
www.aspstreet.com
www.networkmagazine.com/Article/NMG20010521S0002

The Indiana Legal Services website also has a section on its Technology Initiative Grant with information on ASPs, including RFPs, SLAs, bandwidth, and more.
www.ilsi.net

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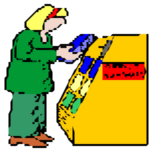
Case Management Applications



Kemp's Case Works (KCW) Clients

KCW has been providing technological support to legal services and pro bono programs since 1988. It's founder, John Paul Kemp is a former Vista legal services attorney. It's primary product is Clients Case Management Program which has been used in legal services since 1986. It is the mostly widely used case management software at legal services offices and pro bono programs and 22 states have standardized their legal services offices on Clients. The current product, Clients 2000, is available in a Microsoft Access version for use on a LAN, suitable for offices with up to 40 employees. The Microsoft SQL version works with a WAN. The Web-enabled ASP version was released in 2001 and allows an unlimited number of users to connect to the case management system from virtually any computer.

John believes the major benefit of using an ASP is that it allows legal services to concentrate on the strategic use of their computers and applications rather than spending time maintaining and upgrading their system. Using an ASP also recasts many computer-related expenses from a capital outlay to monthly line item.

According to John Kemp, there are two ways of running a program over the Internet. His approach is to use a Citrix server housed at an ASP. This allows an already existing program to run on the Internet so that you don't need to write multiple versions of the software to run specifically on individual PCs, LANs, WANs or across the Internet. The other approach is to write a program using Active Service Pages, Pearl, Java, or other web-based language specifically designed to work over the Internet.

John proposes a framework for ASP implementation which includes developing (1) an entrance strategy, (2) an operations strategy and (3) an exit tragedy.

Statewide coordination will be necessary if the software will be used across the state and it is crucial for the participants to develop a timeline. Some points to consider during the entrance strategy stage:

(1) Entrance Strategy

Choosing an ASP

A legal services program will usually decide what applications it needs and then contract with the case management or legal document assembly software provider. These companies may not necessarily be ASPs but will contract with an ASP to provide the internet hosting and data storage services. The legal services program can also acquire the software and hire a hosting company on its own. According to John, the most important consideration in choosing an ASP is safety of the data. He likens it to sending your children off to school. You want to ensure they are safe while they are in someone else's care. Some of his criteria for choosing an ASP are:

- How long the company has been in business and working as an ASP
- The company's financial condition
- Major accounts
- Independent ratings and references
- Level of security offered
- Where the data center is located
- Back-up and data retrieval mechanisms
- Technical support
- Cost

When contracting with an ASP, the Service Level Agreement (SLA) is key, according to Tad Bolhsen, Technology Manager at Indiana Legal Services. The SLA will spell out the specific services the ASP will provide, how quickly it must respond to problems, and set the pricing. Tad advises that programs negotiate a sufficiently strong penalty clause so that the ASP will be deterred from ever violating the SLA.

Printing is another consideration when working with an ASP. Tad cautions that all types of printer drivers should be loaded on the ASP server because you can never know what type of printer a remote user might have.

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Bandwidth

ASPs require that the end-user have sufficient bandwidth to make satisfactory use of the program. John suggests that a program running Citrix will need 12-20K of bandwidth per user. However, the Internet provider's published bandwidth is not necessarily the same as the available bandwidth. The way a system is being used contributes to the bandwidth requirement. If users spend time on the Internet in ways that eat up bandwidth, such as watching video streaming, the capacity may not be serviceable for ASP use even though the stated bandwidth indicates it would be satisfactory.

The issue of insufficient bandwidth came up several times during research for this article. Several programs have found that their inability to connect to the Internet at sufficiently high speeds resulted in the ASP applications running too slowly. It is crucial for actual bandwidth to be tested and brought up to the required capacity before embarking on the ASP journey. This may be a real problem in some areas of the country where fast Internet access is not available and T-1 lines may be too expensive.

Data-Conversion

In order to use a new application over the Internet, the current data files will have to be converted to the new system. The legal services program should satisfy itself that this can be accomplished smoothly before deciding to embrace ASP.

2. Operation Strategy

Points for consideration in operation strategy include support, maintenance, backup, and upgrades. The ASP should be able to perform all of these functions. John believes "shadowing" is an important element of maintenance and support. That technology allows the ASP to take over the end-user's desk top from a remote location and move the mouse in order to deliver remote support.

Theoretically, users should not have to back up their data– that is done by the ASP. The user will want to know how often it is done, where the data is stored, if the user can perform back up if desired, and whether the ASP will provide a back up disk on a regular basis.

3. Exit Strategy

Planning an exit strategy will help the program weather an unsuccessful ASP venture. A program may find the system works too slowly because of insufficient bandwidth and may not want to invest in T1 lines or DSL for all its desktops. ASPs have been known to go out of business. Programs need to ask how they will get their data out and what they will do with it once they have it. While programs will eventually get data back from a shut-down ASP (according to John, courts have even ordered ASPs to remain open until clients have gotten their data) it may take a few weeks. Once the program has its web-based data out of the web-based system they will need to know how they will be able to run it. Can it be converted to the new system they will use? Since most web-based programs will use a standard database such as Access or Oracle, converting the data to the new software would be facilitated if the same type of database is used. Otherwise, the conversion might prove tedious but not insurmountable. In any case, programs will need to plan how to deal with the down time. They might have to go back to paper records during the interim until data can be entered in the new system. John believes his product will largely avoid these problems because it could be run on local computers and shared via LAN or WAN should the ASP not work out.

For more information contact:
Kemp's Case Works
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Who's Using Clients ASP Version?

Indiana Legal Services received an LSC Technology Initiative Grant to implement the use of Clients over the web. Tad Bohlsen, Technology Manager, says ILS plans a three phase implementation process. During the first phase, Clients was installed on a LAN at the ILS main office. As a result of statewide merger ILS now how 12 offices. The next phase will bring Clients over the Internet to the 12 offices as well as to service partners ILS is developing for the project. These include domestic violence shelters, social services offices, and other agen-

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cies. Using Clients in this fashion will allow an agency to prepare an intake for a client on its computers in the field.

To implement this phase of the project, ILS will hire an ASP to host Clients using a Citrix server. The bigger offices will have fast ISDN, DSL or T1 connections. However, some of the smaller offices and partner agencies may only have one person using the system. Tad believes that the existing dial-up connections will be sufficient. At ILS they also have bandwidth management hardware and software known as Packeteer. This allows an organization to decide which applications will have bandwidth priority and a guaranteed percentage of the available bandwidth space. Tad envisions the implementation of Clients via ASP taking about six months.

The third phase contemplates the linking of offices and partners via telephone network.

Legal Services of Western Oklahoma had implemented Clients via ASP at the beginning of the year. That program has 10 offices doing civil work that needed to share the Client software. Linda Johnson, Information System Specialist at Western Oklahoma liked the application very much. However, when a lot of users were on the Internet at the same time, the connections they had were too slow. They were running dual ISDN lines with 128K bandwith at the main office with 20 users. The ASP then went out of business. Kemps Case Works has contracted with a new ASP and should be ready to run Clients over the web by September 2001. In the interim, Western Oklahoma is boosting its bandwidth capacity. The main office will go to a T-1 line and the smaller offices with use DSL.

Linda is looking forward to being able to use Clients over the web again. She believes this is a much more cost efficient option than creating a WAN. A major concern for her is the fact that additional in-house technical support would be required to support the WAN. With the web application, support can be centralized at the ASP. Linda is also hoping that she will be able to do “shadowing” to control users’ desktops for training and support.

Legal Services grantees in Arkansas, Virginia, and Mississippi have received 2001 Legal Services TIG grants to implement Clients over the web. Jean Carter, Executive Director at the **Arkansas Center for Legal Services** explained that the grant will be used to set up a statewide Legal Helpline with one 800 number that any legal services eligible Arkansas resident can call to receive advice, referrals, or apply for legal services. The 800 number will route the calls to the local offices. There are presently six LSC providers in Arkansas all of whom use Clients on their LANs. By the time the Helpline is expected to open, January 2002, they will have merged the six programs into two. All the programs’ data will be converted to run on the Clients ASP version and all data will be housed at the ASP, however, the databases for the two programs will remain separate. A major component of the implementation plan now under way is to make sure that all the offices have adequate connectivity to run the software over the Internet.

A similar project is underway at **Virginia Legal Aid**. Under the LSC grant, the six Virginia LSC grantees will convert their case management data to Clients 2000 which will run over the Internet. According to Kelly Shuptrine, Director of Administration at Virginia Legal Aid, the goal of the six programs is to become more coordinated for purposes of training, service delivery, and cost efficiency. Virginia will also have one 800 number for clients to call. They will be routed to their local program office at which point intake will be performed according to the protocols of the particular program. Shelly believes that the ultimate goal for each program will be provision of legal advice by phone at the intake level. Like the Arkansas plan, the data will be stored at the ASP but they will maintain a separate database for each of the six participating programs.

North Mississippi Rural Legal Services is the LSC grantee for a project to implement Clients ASP version at the four Mississippi legal services programs. According to Ben Cole, Executive Director at NMRLS, they still haven’t resolved whether to receive the service from Kemp’s ASP or to have the software hosted by a local provider.

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Tele-Lawyer, Inc.
(Telephone and Case Management ASP)

Tele-Lawyer, Inc. started in 1989 as the first commercial telephone legal advice service. Its stated mission is "to provide greater access to justice by revolutionizing the delivery of legal services through converging technologies." Tele-Lawyer, through the Virtual Law Office section of its website, delivers products and services on an Internet hub for consumers and attorneys. It provides legal information, forms, forms preparation, case-matching and document storage. As each attorney logs in they can choose the services they need. According to Elliot Schear, Vice President of Business Development, Tele-Lawyer is in the process of developing ways to deliver such products as interactive document preparation and litigation support software over the Internet. The concept is for attorneys to be able to rent software that would be too expensive for small practitioners to purchase.

Most importantly for legal services, Tele-Lawyer has sought to provide solutions for the two major technology requirements of the legal hotline model - phone systems and case management software. Although we usually think of ASPs as providing access to software on the web, Sara Wessells, Tele-Lawyer Director of Operations, explains that both the phone system and case management software are web-based. As of Summer 01, Tele-Lawyer had finalized six contracts to provide services to legal services programs. Another six contracts were under negotiation.

Sara Wessells provided *LHQ* with a live demonstration of the case management software which utilizes Active Service Pages and the integrated telephone system via login at its website. Tele-Lawyer case management software focuses on the needs of the legal services program at the intake (hotline) level but includes calendaring, time keeping, referrals and reporting also.

One of the goals of the software is to immediately calculate if the client is eligible under any of the organization's funding streams. The software is customized for each program. The screens can be arranged according to the program's needs. The software contains hyperlinks to LSC guidelines and state policies. Protocols are being developed for many typical client calls which will take the telephone advocate through a checklist for the particular type of problem.

If programs desire, they can integrate a self-intake feature. Clients will be able to log onto a website at their own computers or at an agency, answer eligibility questions online, put themselves in queue for the hotline advocate, or receive some referral options on screen if they are not eligible.

According to Sara, the integrated telephone services allow programs to have access to a full-featured ACD and IVR telephone system without having to purchase it. Whoever is designated to answer the phone, whether a pro bono attorney at his own desk, hotline advocate, or the telephone receptionist at the legal services program, logs into the phone system website to let the system know they are ready to receive calls. They may indicate skills, such as Spanish-speaking, family law, etc. so the phone system routes calls to the appropriate advocate.

Tele-Lawyer is the ASP for these products and services. Data is stored at its guarded facility in Las Vegas with multiple safety features. There are five redundant servers across the country to prevent crashes. Sara Wessells will be pleased to demonstrate the Tele-Lawyer services to any one interested.

A program will usually have to pay costs to develop and implement the program for its specific needs. These costs will depend on what is required. After that, the Tele-Lawyer fee structure (Summer 2001) is a 12 cent per-minute charge which includes the 800 services, ACD, IVR, the web-based case management, and technical support. Additional services, such as having the Tele-Lawyer operator answer the phone, are not included in this cost.

For further information or a demonstration contact:

Sara Wessells 800-835-3529
swessells@telelaw.com

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Who's Using Tele-Lawyer, Inc.

Nevada Legal Services implemented the Tele-Lawyer case management system in late 2000. They are not presently using the telephone services. NLS has three offices which access the system on the web.

Wayne Pressel, Executive Director at NLS, envisions a three phase technological expansion. The first phase, already completed, involved replacing the previous case management software with Tele-Lawyer's product at the three offices. The second phase, with the assistance of an LSC technology grant, will be the creation of a revised website for NLS and other statewide legal services providers. Tele-Lawyer will provide the technological platform and services to develop and maintain the site. The website will allow clients, as well as legal services attorneys, to create letters, self-help pleadings, and forms online. The user will not have to download the form or additional software - the processing will all happen at the Tele-Lawyer server. The interactive document preparation will be linked to the case management system. In Wayne's plan, if a hotline attorney speaking to a client determines, for instance, that the client needs a self-help eviction defense pleading, he will be able to click on an automatic website link which will allow the attorney to prepare the particularized pleading and then e-mail or send it via post to the client. The client will also be able to do this for himself at the new website. The interactive document preparation is still under development.

Wayne is in the process of putting together an advisory committee for the website which consists of the other legal services providers in the state and various bar associations. The concept is to create a statewide legal online community with shared intake.

The third phase involves the creation of a multi-program legal hotline with Tele-Lawyer handling the telephone carrier, and possibly receptionist services, but the providers would deliver the legal services for both eligible clients as well as for fee-paying LSC ineligible clients. The goal is for NLS not to turn anyone away.

Wayne cautions that quality is paramount when dealing with an ASP. The development of the case management application has been a lot of work but, according to Wayne, Tele-Lawyer "has been excellently competent and incredibility patient."

He feels that one of the great things about this application is that it is easily changeable and customizable. By way of illustration, Wayne described the addition of a new funding source that necessitates a new eligibility screen and requires tracking a particular type of client, such as disabled people. NLS is able to acquire the new screens with a call to Tele-Lawyer. Once NLS no longer needs to qualify or track these clients, Tele-Lawyer can remove the screen. No new development or installation is required. On the other hand, because the number of screens is infinite, the program staff may have different visions of what the system should contain. The internal process of getting staff agreement on customization can be challenging.

This point illustrates a mindset among programs. Many believe that once they get their software "perfect" they will be happy users from then on. Wayne notes "there will always be a 'punch' list" – features that you no longer want or decide you need to have. With this system, ongoing changes are greatly simplified.

At NLS each CPU has to be certified in order to access the case management system on the web. They elected this system for security reasons. It is a relatively simple matter to certify a desk- or lap-top to use the system. Tele-Lawyer downloads data to the NLS office daily. The offices have DSL lines for connectivity which Wayne has found sufficient to use the system.

Central Florida Legal Services received an LSC TIG to a create multi-program hotline with Withlacoochee Area Legal Services and Three Rivers Legal Services. Since then, CFLS has merged with one of the programs so the hotline will now involve two, rather than three, legal services programs. CFLS has contracted with Tele-Lawyer to provide the telephone services for the hotline. The Florida program operator will pick up the call during the first four rings. The phone system will check the prefix of

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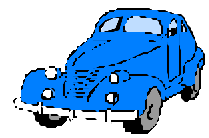
the originating phone call and route the call to the proper office among the programs participating in the project. Under the terms of this particular contract, if no one at the Florida programs answers after the fourth ring, the Tele-Lawyer operator will pick up. The telephone operator will enter the client demographic data and case type. When the call is forwarded to the attorney, the case record will come up on his computer screen. Before he picks up the call, he can run a conflicts check, review the history, and even call up protocols for specific case type codes.

According to Bill Abbuehl, Executive Director of CFLS, the case management software will be used by the hotline and full-service staff of the two programs who will be participating in the hotline project. Each of the organization's data will be converted from their old case management files to the new Tele-Lawyer product. For purposes of the hotline, the participating programs will consider themselves one program. Since the service areas of the participating programs are different, Bill does not expect the joint conflicts-checking to create a problem. The hotline opening date is targeted for October 15th so Bill could not report experience with running the Tele-Lawyer software. He feels that the process of setting up the hotline was simplified because CFLS did not have to research phone systems and the case-management development has proceeded very smoothly.

Under contract with the **Maryland Legal Assistance Network**, Tele-Lawyer will provide telephone connectivity and services for the five programs that will be participating in a "distributative" intake hotline in Maryland. Each of the five programs already has a telephone advice component and will provide staffing for the hotline, telephone advice, and referrals to other programs. S*ee LHQ Spring 2001.* Tele-Lawyer case management software will be used to manage the first stage of intake. Each participating program will then load the data onto its own case management system for further services.

CARPLS in Chicago is facing the simultaneous need to upgrade its telephone system and case management software. They are investigating Tele-Lawyer as a provider for both functions but would not make use of operator services. As of Summer 2001, CARPLS has not signed a contract

United Auto Workers Legal Services Plan



CMS

UAW Legal Services Plan provides legal services to UAW union members for benefits covered by the plan. UAWLSP has 70 offices in 20 states, employing 345 attorneys. The offices are most heavily concentrated in Michigan, Ohio, and Indiana.

Well before its acceptance by LSC, UAWLSP recognized the benefits of the hotline delivery model, which it, like LSC, calls centralized intake, and incorporated it into the legal services they provide. One or two attorneys in each of the UAW Legal Services offices are designated to handle telephone information and advice calls and may send advice letters. Many covered matters requiring further legal work are handled by in-house attorneys. Certain matters, such as contested divorces, may be referred out to cooperating panel attorneys.

According to Dolores Galea, Assistant Director of UAWLSP, UAW Legal Services Plan contracted with a software developer from Microsoft Consulting Services to create a web-based case management system. It decided not to use Citrix, but go to a true web-based system. The system, called CMS allows for recording of client demographics, case information and notes, advice letters, task lists and document assembly. Ms. Galea notes a particularly nice feature of CMS is the attorney rotator which maintains a list of panel attorneys throughout the nation and helps assign referral cases based on area, and subject matter, rotating through the matching attorneys. 100% of the UAWLSP offices were online with CMS by November 1999. The panel attorneys do not use CMS but go to the Plan website for billing.

UAWLSP has its own servers which work through a frame-relay network. CMS was loaded on the web server but also is loaded on each office server. Each office keeps its client database on its own server. Data from any office can be accessed by logging into the central server although strict authorization is needed, so in effect, offices are only able to retrieve their own data.

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After putting CMS in the field, UAW discovered the system was operating too slowly. The 70 offices are connected to the Internet with 56K lines. Ms. Galea explained that CMS relied very heavily on COM objects to do the processing on the server and ActiveX controls to manipulate the user interface. (COM objects is a Microsoft software architecture that forms the foundation for higher level functionality including operations between applications and data transfer. ActiveX is built on COM and is designed to provide integration with web browsers.) As a result, CMS worked too slowly on the 56K lines and UAW Legal Services did not want to invest in upgrading the Internet connections to T-1 lines for all those desktops. Another solution had to be found and the result is a new product called CMSLite.

CMSLite

CMSLite will perform all the case management functions of CMS but is faster because it doesn't use the same protocols that slowed CMS down. Both CMS and CMSLite are written in a subset of Visual Basic, but rather than COM Objects and ActiveX controls, the consultants used Active Server Pages and stored procedures along with some XML to do the data transfers between the browser and server.

Certain features of CMSLite are already operational. It should completely replace CMS at all the offices within 2 years. Staff at the field offices will be able to go to the website and just log in. Nothing will get downloaded or stored on the field office servers. Dorothy believes CMSLite is particularly useful for legal services managers. Not only can the manager call up an attorney's name to view his open cases, it allows him to open several cases at once and flip between them. Rather than run just reports in response to a variety of queries, such as tickled cases, CMSLite allows the user to actually open the files within the query.

UAW owns the codes for CMSLite so the system could be purchased by other organizations. If you are interested in learning more about CMSLite please contact:

Dolores Galea
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Practice Manager

Practice Manager is the case management software from RealLegal which is the applications division of Law.com. Practice Manager integrates matter management, contact and relationship management, document assembly, litigation support, e-mail and groupware, workflow and time-tracking. According to Lewis Kinard, Managing Consultant at RealLegal Practice Manager and formerly of Legal Services of North Texas, no one else has a Microsoft BackOffice Certified solution or a Qwest approved ASP solution. Lewis describes Practice Manager as an electronic file folder for client contacts, documents, notes, time and expenses. It collects all the data needed to generate reports. Most users design reports in Access or Crystal Reports. Practice Manager is web-enabled and can be run at five different levels:

(1) programs can run Practice Manager on their own services with a WAN
(2) programs can self-host the software with a web-server and Citrix.
(3) the program can hire an outside hosting company and run the program using Citrix. This is sometimes known as co-hosting. The data center manages the servers but the legal services programs manage the application.
(4) the program can hire a hosting company to run the program with a Windows 2000 terminal server which provides the same functionality as Citrix.

At the hosting levels, the program would need to purchase Practice Manager and pay a monthly subscription fee to the hosting company.

(5) Full ASP option though Practice Manager. At this level, the organization would pay a monthly subscription fee for the use of the software and servers at RealLegal.

Lewis explains that the costs increase as you go up the levels of outsourcing but RealLegal.com offers generous discounts to non-profits.

For more information contact:

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Who's Using Practice Manager

Pine Tree Legal Services saw the benefit of having case management software run on the web and decided to make it happen for the state of Maine. With IOLTA funding from the Maine Bar Foundation, Pine Tree Legal Assistance acquired the servers, software, and connectivity necessary to be an ASP. The six Pine Tree offices, Legal Services for the Elderly (three offices), the Maine Equal Justice Project, Maine Center for Economic Development, Maine Women's Lobby, and the Volunteer Lawyers Project all participate to receive their case management software and e-mail through PTLA. The Cumberland Legal Aid Clinic at the law school is also being added to the ASP project.

Hugh Calkins, Director of Litigation and Training at Pine Tree, explained the benefits of having all the programs participate. According to Hugh, Practice Manager, the case management software selected for use by the Maine legal services providers, is a very robust, high end product, which includes document preparation. It would be too expensive for most programs, especially the smaller ones, to have it individually installed and supported on their local networks. By using Pine Tree as an ASP, the software only had to be installed on the Pine Tree server and all technical support is done there. The software is web-enabled through a Citrix server. Practice Manager licensed Pine Tree and assisted them with setting up the system. All data is stored at Pine Tree with a secure back-up system but the databases for each program are separate. All programs are able to access certain databases such as the list of volunteer attorneys and courts.

The programs access the ASP server in various ways. Some come in through frame-relay networks, some have cable or DSL Internet access and a few of the smaller offices have dial-up connections with 56K bandwidth which is sufficient to access the application. A couple of offices have what is knows and a BANA circuit. This is the type of circuit normally used for burglar alarms and provides direct wired access to the Citrix server.

Pine Tree started working on the project about 1 ½ years ago, and as of August 2001, it had been functioning for the past six months. As with any new endeavor, problems arose during the implementation. Hugh reported that some switches failed and had to be replaced.

A more frustrating problem was that the telephone company did not provide the bandwidth it promised. The telephone company had to be convinced to investigate and bring the bandwidth up to the required capacity. Some of the offices have a couple of means of accessing the server because frame-relay is sometimes too slow.

All in all, Hugh finds the problems are being worked out and the programs are pleased to have the benefit of the case management, e-mail, secured data storage, print server, and shared data, which each of the legal services organizations could not have accessed on its own.

Legal Services of North Texas is also self-hosting Practice Manager. Legal services programs mid and central Minnesota are buying software licenses from RealLawyer, Corel, etc. and renting data space and servers at a data center.

TIME

Western New York Law Center provides legal support to western New York State legal services programs and technology support statewide. It is the provider of TIME case management software and has recently come out with a web-based version of TIME. It is written in Visual Fox Pro and WNYLC uses WestWind Web Connection to connect TIME to the Internet. This connection is the same one used by the electronic case management software provider for the federal court system. Joe Keleman, Executive Director at WNYLC, explained that web-based TIME requires each work station to have the TIME software loaded on it. It could have been written in such a way that no software was needed at the user end – just a web browser- but WNLC decided against that method for three reasons. First, Joe stated that requiring software at the user end was much more secure than a program accessible from any desktop. Secondly, when browsers change versions, the appearance of the application can also change. This is avoided by having the software at the

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user end. Finally, Joe believes this method allows for more functionality.

The web-based TIME is written in such as way that programs can avoid having to install high speed Internet connections. If only 10 or so users will be working on TIME away from the main office, a dial up connection would be sufficient. If however, more than one office will be accessing the program through the web server, it will need a 128K DSL, cable modem, or satellite connection. Nebraska Legal Services is currently using the web-based TIME and Prisoners Legal Services of New York State will connect soon.

For more information contact :
Joe Keleman
Western New York Law Center.
716-855-0203 x.2
jkeleman@wnylc.com

Who's Using TIME ?
Nebraska Legal Services
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Nebraska Legal Services is one of the first programs to use the web-based version of TIME. According to Tim Kelso, Director of Centralized Intake at NLS, they first installed the web version about six weeks ago and it has been going quite smoothly. NLS, as a result of LSC mergers, is now one statewide program with seven offices. Linking the offices was necessary but creating a WAN was too expensive. Sharing the case management software was a much cheaper option and also allowed for centralized technical support from WNYLC. By having TIME on the main office web server, the offices are linked over the web in a virtual private network. All data is stored at the NLS end. Tim reports that NLS has definitely decided not to operate TIME through an Application Service Provider but they are considering subscription computing services. This service allows computer technical support to be out-sourced to a single point of contact for all offices. The subscription service provider would host the NLS e-mail and websites and provide technical support. Tom explains that this is a way to have an IT department while sharing the cost with other companies. No decision has been made whether to go forward with this contract.

Pika Software

Aaron Worely, formerly the Technology Manager for the Michigan Poverty Law Center is developing Pika software for use by legal services programs. From his experience in Michigan, he determined that a web-based case management system was the best way to bring shared software capability to multi-office programs. In Michigan, most programs are able to access only dial-up Internet connections, so he determined to develop a program which would work satisfactorily with the available level of connectivity.

The Pika software handles client intake, timekeeping, calendaring, unlimited casenotes, reporting which can generate Excel charts and graphs, and lawyer referral. It can generate form letters that load onto Word or WordPefect.

The Pika system requires an SQL database for data storage and Apache web server software. Pika is written in PHP, an open source web scripting tool similar to Active Server Pages, that provides compatibility with all popular SQL database servers. According to Aaron, pikasoftware.net will contract with legal services organizations to license and support the software for a monthly fee; however pikasoftware.net will not itself be an ASP. Rather, legal aid programs can take the software and become their own ASP or they can contract with a web hosting company to perform this function. Pika will also run on a WAN.

If the legal services organization decides to act as its own ASP, the software is loaded onto the program's web server and any user can access the software through a website and password. Web server bandwidth requirements depend on the number of users. If there are many users (100 or more) the program will need at least a high speed DSL line for the web server connection.

Aaron believes that since many legal aid organizations do not have the in-house expertise to operate and maintain a secure web server, they would

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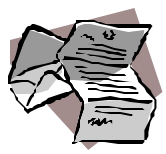
benefit from acquiring the software on a subscription basis. The subscription plan provides support for the Pika software itself, Apache (the web server software), MySQL (the database) and Linux (the operating system). Hardware and network issues are not supported. The subscription also provides software updates. Licensees will be able to use and modify the software internally, even if the support contract is later allowed to lapse.

For further information and a demonstration of pikasoftware.net

Contact: Aaron Worley 216-295-0005
amworley@pikasoftwre.net

Other Web-Based Applications for Legal Services



Western New York Law Center
County Specific Letter Writing

Three legal services programs in New York State, Legal Aid Society of Northeastern New York, and programs in Rockland and Putnam counties, received a joint LSC technology grant to figure out a way to post client letters on the Internet. WNYLC was contracted to do the development. The process is well under way but not completed as yet.

The letters work on Active Service Pages, which is open source, and programs will not need any special software to use it. It will allow attorneys to write client help letters, include county specific information for New York and post the help letters on the Internet. Clients can access the letters by going to a website and selecting the topic and county.

There will be three types of users, determined at login. An overall administrator will be able to log in and change anything in the application. The second level user is at each office. Whoever is in charge of the application at the office level can login and edit letters posted by that office but cannot change letters posted by others. The third type of user is the client who can access the letters from any computer. Joe Keleman at WNYLC stated that client log in is still being considered. Possibly, clients will be asked to provide an e-mail address if they are willing.

The application isn't finalized yet but, according to Lillian Moy, Executive Director of LASNNY, it will soon be available to share with legal services providers for the indigent who want to use it to create client letters for their counties or state.

For more information about or a demonstration of the Letter Writing Application contact:

Joe Keleman,
Western New York Law Center
716-855-0203 x.2
jkeleman@wnylc.com

Probono.Net

Probono.net was founded three years ago by Michael Hertz and Mark O'Brien with a grant from the Open Society Institute. It also has other funding including grants from local New York foundations.

The goal of the non-profit is to create a set of on-line utilities for legal services and public interest law offices to better run pro bono programs and to support legal aid and cooperating pro bono attorneys in their work. The www.probono.net website is dedicated to supporting legal aid and pro bono attorneys. Programs in New York City were the original content providers. The site has since expanded to serve lawyers in other New York areas, San Francisco and Minnesota, in specialized subject areas such as asylum, disability rights, death penalty, and family justice.

The organization, with participation from a consortium of local New York City legal aid programs and the City Bar Fund, has also set up www.lawhelp.org designed for clients, socials workers, friends or family members who are assisting people in need of legal help. Clients can go to the site, search by zip code, borough, and type of case, and receive the contact information for programs that should be able to help them. Client education materials on a wide variety of subject areas will soon be available there also.

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Probono.net figures into the topic of this article because it has developed a web-based application whereby each participating program can supply and edit content on probono.net and lawhelp.org.. *Probono.net* is the ASP for the platform and will host, store data, and maintain the application.

Each participating organization will have an authorized administrator. By clicking on the “adminsistrator” link on the website and entering a password, each organization will be able to add content, update it and change it as needed, limited to that portion of the content over which the particular organization has been assigned control. All the content at lawhelp.org will be searchable by zip code and problem code. The navigation of the site can be customized by state and changed through the administration button.

According to Mark O’Brien, the benefit of this application is that it provides a common platform for all the participating groups rather than each one having to build its own application. Each program can still maintain its own website if they wish. From a user’s point of view, though, lawhlep.org will allow him to get all the relevant self-help materials posted by all the programs at one site. Lawhelp.org is currently being tested by legal service intake workers.

LSC has awarded grants to over 25 states to provide content for the websites via the Probono.net ASP. Most of each state’s grant will go to develop content but each participant will pay $10,000 of the grant to *Probono.net* for the development, maintenance and enhancement of the application.

For more information contact:

Mark O’Brien
MOBrien@probono.net

Websites of Interest

www.aarp.org/litigation

AARP Foundation Litigation (AFL) has launched a web site featuring a full list of all of AFL's cases, case summaries, and amicus filings. The new site features downloadable issues of the "Elder Law Forum", and "The Legal Bulletin", a subject-indexed monthly overview of emerging statutory and case law which impacts elder law. The site is the online record of the Foundation's legal work in the areas of age/disability employment discrimination, consumer protection, health and long term care, employee benefits, access to legal services and others.

www. seniors.gov

This is the website of FirstGov for Seniors which is a project created by the National Partnership for Reinventing Government. SSA agreed to create and host the site. If is designed to provide one stop shopping to numerous government agencies and programs. The user doesn’t need to know which specific agency to contact for his inquiry. The site will lead him there.

www.ssa.gov/espanol/mujeres

This area provides basic Social Security program information in Spanish pertinent to Hispanic women.

www.ssa.gov/representation

SSA has added a new area for claimant representatives. You can download Appointment of Representative Forms, get information on attorneys’ fees and links to other resources.

www.nhlp..org

The National Housing Law Project provides legal assistance, advocacy advice and housing expertise to legal services and other attorneys, and low-income housing advocacy groups. The site has packets of information on housing issues including forms and pleadings.

Update on Senior Legal Hotlines Title IV Projects

The 2000 Title IV competition yielded an unusual result - of the five hotline awards the Administration on Aging usually grants in the competition, four went to existing senior hotlines and only one was awarded for the establishment of a new hotline (in Indiana). The existing hotlines impressed evaluators with their plans for innovative projects that hotlines are in a prime position to implement. A summary of the accomplishments to-date in Washington and Georgia in setting up these innovations is described below.

Northwest Justice Project

The **C**oordinated **L**egal **E**ducation, **A**dvice, and **R**eferral System for **S**eniors
*"CLEAR*Sr"*

CLEAR*Sr is a statewide toll-free access system for people 60 years of age and older to obtain free legal assistance with civil legal problems. CLEAR*Sr is presently funded by a 3-year grant from the Administration on Aging (AoA). Telephone intake lines are open Monday through Friday between 9:30 a.m. and 12:30 p.m. The toll-free number is 1-888-387-7111. The toll-free TDD is 1-888-201-9737.

In addition to providing its telephone intake services, another goal of the CLEAR*Sr under its present grant is to develop ways to disseminate information about consumer law issues to seniors and lay advocates so that they might identify potential legal problems before they ripen. This project is essentially three-tiered, focusing on updating and creating informational brochures, internal/external "issue spotting," and advocate training on consumer law issues.

More specifically, the first component of the project includes further development of educational/self-help brochures about consumer legal issues.

Informational Brochures

To date, several brochures are in the works, including:

Purchasing Property
Watch out for Scams
Identity Theft-Could it happen to you?
Hiring a Contractor
Purchasing a Used Car
Prioritizing Debt/Which Bills to Pay First
How to get title to a mobile home
What to do if your check bounces
Credit Card Scams

Second, CLEAR*Sr is conducting both internal consumer "checkups" for clients, as well as external outreach to conduct "issue spotting" trainings for lay advocates who serve seniors, including immigrants, Native American and farm worker populations.

Consumer Checkups

Consumer checkups are quick interviews about consumer issues that we offer to our CLEAR*Sr clients. Basically, after a CLEAR*Sr advocate conducts an intake, gives advice, service and/or referral, he asks the client for permission to make a follow-up call to talk about other possible consumer issues that might be affecting the client.

The checkup interview includes questions about recent consumer transactions, i.e. any recent purchases via telephone, door-to-door sales; questions about home ownership, i.e. whether someone might be behind in taxes, need repairs, had some recent repair work-etc. The checkup is concluded with the interviewer offering some additional "did you know" information about consumer services available to seniors, like Washington's Telephone Assistance Program (WTAP), cable assistance, tax exemptions/deferment, LIHEAP, charity care etc.

The results of the checkup interviews are reviewed bi-weekly at CLEAR*Sr staff meetings. If a client appears to have additional consumer issues needing attention, one of the advocates will be assigned to further investigate and service the case. If no issues surface, the client will be notified in writing and the file closed.

Issue Spotting Trainings

These trainings include information sessions about consumer issues affecting seniors. The best examples of possible topics presented are as listed

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above under our new informational brochure section. The CLEAR*Sr project manager hopes to conduct several of these trainings throughout the grant period, but as of now, several are tabled until Fall due to her anticipated maternity leave.

The final component of the grant will be to develop a larger private bar referral base for consumer legal issues in two pilot project areas, Snohomish County and Yakima County.

Pilot Project Areas/private bar involvement in Snohomish and Yakima Counties

CLEAR*Sr will be working with the local volunteer lawyer programs and the National Consumer Law Center to present consumer legal trainings to encourage advocates to take on consumer cases for seniors. The CLEAR*Sr project manager has met with representatives from both counties and plans are underway to coordinate consumer trainings for attorneys based upon the identified needs of each county.

In conjunction with planning the trainings, new features will also be added to the Northwest Justice Project website to provide a "resource center" for attorneys, who agree to receive referrals of consumer cases affecting seniors. Efforts are also underway to develop a list of mentors to further assist these attorneys as they work through these cases.

Throughout the term of the grant, CLEAR*Sr will also be collaborating with the Attorney General's Consumer Protection Division on preventive education and trend-spotting, so that we might continually fine tune the brochures, outreach and training materials.

Target issues of the project include home equity/repair loans, debt collection, garnishment, home repair contracts, fair credit, truth in lending, credit repair companies, telephone and automobile scams.

CLEAR*Sr welcomes feedback and any input or advice about how the project might better serve its senior populations. Please feel free to contact the CLEAR*Sr Project Manager:

Lisa Groeneveld-Meijer
lisam@nwjustice.org
(206)464-1519 ext. 254.

Georgia Senior Legal Hotline

The Proposal

The Georgia Senior Legal Hotline (GSLH) Title IV Proposal offered to improve the hotline by expanding access to legal assistance and services for vulnerable seniors in the areas of abuse and neglect, including financial exploitation, predatory lending and consumer fraud, and eligibility for public benefits, especially "QMB" Medicaid. It proposed to develop a new screening protocol of affirmative questions, distribute materials and expand private attorney resources for these specialized cases.

To implement the project, the Hotline promised to identify seniors at risk for problems in these areas, inform clients of their rights, provide information and assistance to resolve legal problems, and provide education to help older Georgians avoid being victimized. To execute the plan, GSLH) partnered with Adult Protective Services (APS), The Governor's office of Consumer Affairs and the Attorney General's office, Heath Insurance Counseling and Referral for the Elderly (HICARE), and the Department of Family and Children Services (DFCS). Through these partnerships, APS will be able to connect clients to the hotline, call on behalf of clients and obtain legal information and publications to assist vulnerable seniors.

The Hotline will undertake joint training with the staff of the Office of Consumer Affairs and Attorney General's Office to recognize abuse and financial exploitation and to encourage mutual referrals. The HICARE and DFCS relationships focus on advising Medicare recipients about the QMB program and other benefits such as Medicaid and SSI..

The Hotline works closely with HICARE and Department of Family and Children's Services (DFCS) staff. Hotline posters were distributed to all offices and Hotline staff have provided training for DFCS staff. HICARE and DFCS staff have provided training for Hotline attorneys. The Hotline refers appropriate cases to HICARE and DFCS and receives referrals from them.

The Georgia Bar has recently created an Elder Law Section and Ellie Crosby, the Senior Legal Hotline Manager was named the first Chair of

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the section. The Hotline will work with the State Bar Pro Bono Project and the Elder Law Section to increase the number of referral attorneys available to handle referrals in the area of elder abuse, home equity theft and consumer fraud. The Elder Law Section has committed to presenting a CLE session for attorneys that cover these issues. All members of the Elder Law Section throughout the state will be given the opportunity to join the expanded Hotline referral panel.

The Hotline has provided training for law enforcement workers and will continue to work closely with them to address elder abuse issues. Staff will develop referral protocols for cases where criminal prosecutions are indicated and will continue its close relationship with Atlanta Legal Aid and Georgia Legal Services offices to provide back up and referrals in public benefits cases. The Proposal also committed the Hotline staff to developing a wide variety of preventative materials in the areas of consumer fraud, home equity theft and financial exploitation. Plans call for all hotline clients to be offered preventative information on home equity and general consumer fraud prevention.

Progress To-Date

Public Benefits Component

The Public Benefits screening component of the project was tackled first because it was easiest to implement. Unlike legal services for the poor, senior legal hotlines typically do not have any income requirements for the telephone services. To screen for public benefit eligibles, the Hotline began asking clients if they would mind stating their sources of income. If the caller is reluctant, he is asked if his income exceeds $1500 per month. Another method of eliciting sources of income comes from probing the client's situation during the course of discussing the client's problem. Once they attorney sees they might be eligible for a particular program and tells the client about the possibilities, he is usually willing to divulge income sources in detail.

The hotline placed ads in the free local papers alerting Medicare recipients that they might be eligible for QMB or SLMB and urging them to call the hotline's toll-free number. The hotline attorneys received training on these programs from Atlanta Legal Aid and Georgia Advocacy Office. The hotline attorneys each have the SSI, QMB, SLMB and Medicaid income and asset requirements at their stations. If the attorney determines the client may be eligible for one of those programs, they are mailed a special self-verifying application which can be returned by mail to the office or they are directed to the correct place to fill out a full application.

If the hotline attorney determines the client may be eligible for prescription drugs under the pharmaceutical industry's free drug program, the hotline attorney mails a form to the client to be filled out by the client's doctor. In this way, the Hotline has identified well over 300 seniors who are likely eligibles for QMB and SLMB and staff have mailed information on prescription drugs to close to 400 clients.

Elder Abuse/Consumer Component

During this first year of the grant, the Hotline has focused mainly on the outreach and training facets of the project. It is in the process of developing protocols for the implementation of the abuse and predatory lending portions of the grant. So far, the hotline has**:**

- Convened a special advisory committee on how to structure the consumer project and help with outreach
- Held a training for all adult protective caseworkers at their annual conference to alert them to signs of financial exploitation.
- Held a training for hotline attorneys in handling abuse/exploitation calls
- Held a training with workers at domestic violence shelters through the domestic violence task force.
- Trained hotline staff how to read HUD forms and closing forms, and how to spot predatory lending issues
- Developed a series of client screening questions on predatory lending
- Developed the capacity to review closing documents for clients and advise as to loan terms

Although these predatory lending screening tools have been developed, the hotline hasn't taken this component to the next level of integrating the screening into the hotline phone consultation where the client has called about an unrelated issue. As a result of the hotline's efforts to-date, it has seen an increase in the number of referrals it is received from Adult Protective Services for clients who may be victims of financial exploitation.

From the Frontline

*By Carol Matthews**

CALLS FOR A SUMMER DAY

It is summertime in Washington and everyone wants to get out of town, including hotline attorneys. Accommodating staff vacation plans may mean there aren't quite enough of us to talk to all the clients as fast as we would like. So we begin to devise strategies that will make the best use of our time and help the most people. We begin to look for shortcuts.

One appealing idea is to clear the decks by speedily getting rid of callers who appear to be way outside our eligibility guidelines. I plan on telling the out-of-state landlord with deadbeat tenants to take a hike, politely of course. Turns out she doesn't want to evict her tenants but to get help for them. Not such a quick call after all. Ditto the private attorney who thinks she needs a few minutes but really needs a mini course in poverty law.

My next strategy is to be extremely efficient in interviewing the client. No more chitchat or allowing the client to stray from the point. Once I know what the point is, of course. This means not jumping to conclusions and trying to solve the wrong problem because I didn't let the client tell his story. It is very tempting to try to impose my ordered legal mind on the client's rambling tale but the results sometimes can be disastrous.

Of course, some clients prefer to start at the end and work backward– though not in a straight line. Such clients are helped by asking a few specific questions. What date is on the notice? Whose name is on the deed? Did you sign your name? The other day a client was trying to tell me she had just a very small problem with a real estate closing scheduled for the next week. She did indeed have a problem since the property she was selling was still in her late husband's great aunt's name.

Carol Matthews is an attorney with the Legal Counsel for the Elderly Hotline in Washington D.C.

What does work to speed up calls? Having someone else do intake. Knowing the general subject matter ahead of time. Having useful telephone numbes at your finger or mousetips. Organizing your surroundings. Talking less and listening more. An exception to this is when the client is clearly going to be referred elsewhere for service where she will have to repeat her facts. For instance, the client should be discouraged from giving the names and addresses of all her intended devisees to the hotline when she will be referred to a pro bono attorney to write her will.

A basic principle is that we will give priority to emergencies. Great idea but who says what is an emergency? Often it is the client who says there is an emergency. Any hotline attorney knows that what a client thinks is urgent is often not so. Sometimes the client terms his matter an emergency simply because this is the day he has decided to call us. Other clients have matters that seem very urgent to them for very good reason but less urgent to lawyers. Some cases are emergencies to begin with and then change. A client facing imminent eviction is an emergency . Once the eviction has taken place it is no longer a legal emergency, though it may still be a personal one. Other cases are not identified as emergencies but may well be. Does the client just want to make a will one of these days or is he calling from the hospital? Clients with questions about their mortgages frequently are closer to disaster than the realize.

It really helps to have the telephone intake screener have a checklist for determining if the call is an emergency and checking with a hotline attorney if she isn't sure before giving the call priority.

Summertime clients have much the same problems as any other clients and need the same amount of patience and assistance. I promise to give all their concerns my fullest attention. Just as soon as I return from Maine