CVLS Legal Server Tutorial

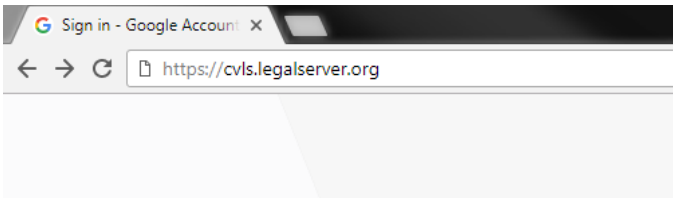
Thank you for taking the time to learn about CVLS' case management system, LegalServer. This is a basic tutorial. There is more help within the system, and CVLS staff can assist you as well.

Information you provide by adding and updating a Case Profile helps us improve client services and volunteer experiences. We understand that data and statistics are not attorneys' strong suit. However, our donors want client demographics, so helping us complete this information ensures continued funding for our programs.

Please contact CVLS staff if you have trouble with LegalServer. We are here to help.

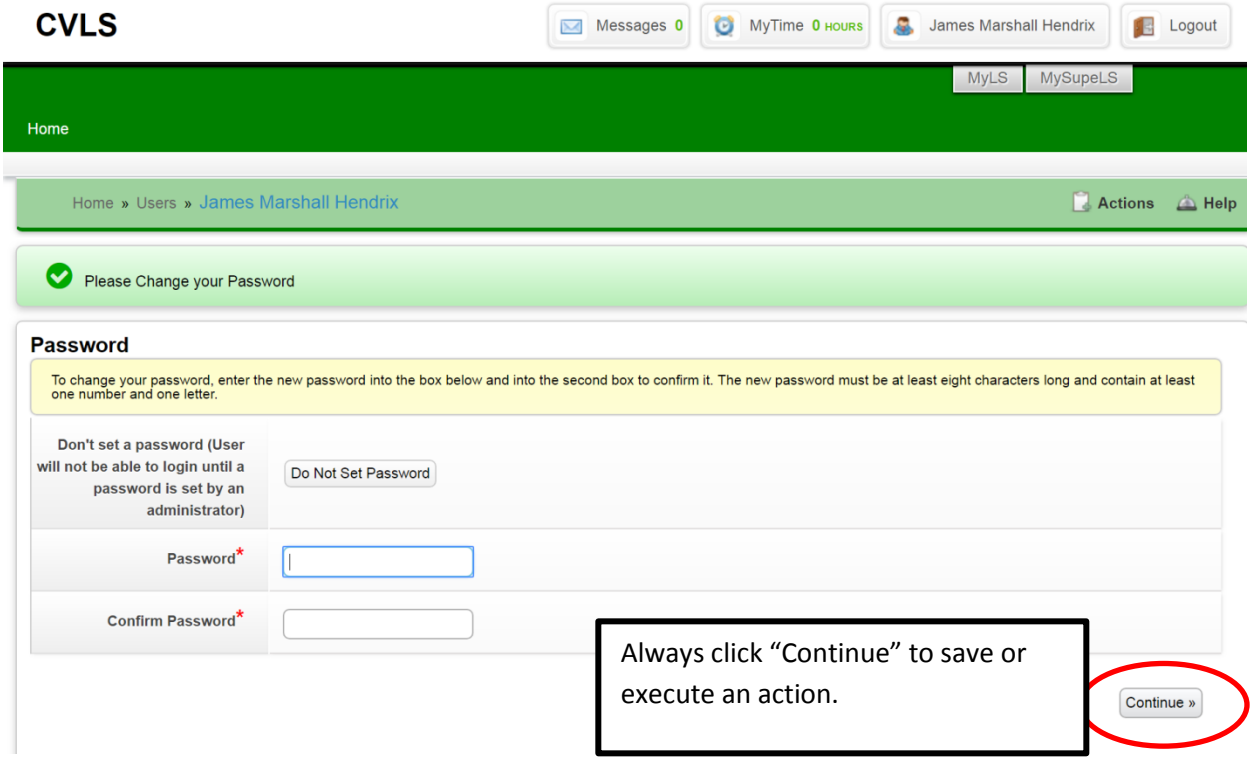
Login

To login to CVLS's case management system Legal Server (LS) open your internet browser and navigate to https://cvls.legalserver.org.

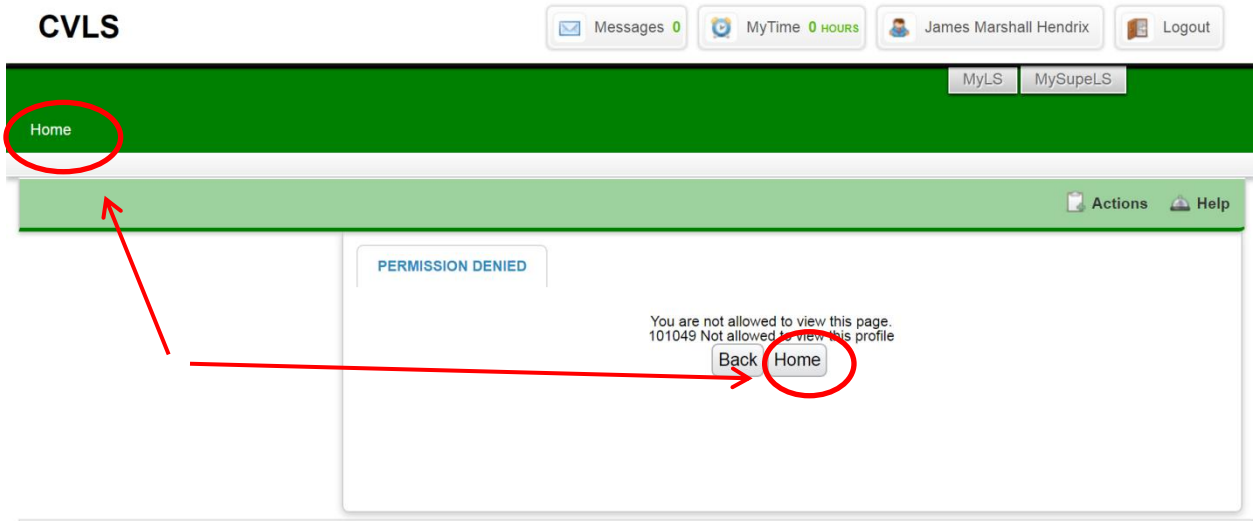


Enter your username and password. Then click Login. If you have forgotten your username or password, contact Jessica at jengle@cvls.org.

You will be prompted to change your password. Enter and confirm your new password and then click Continue.

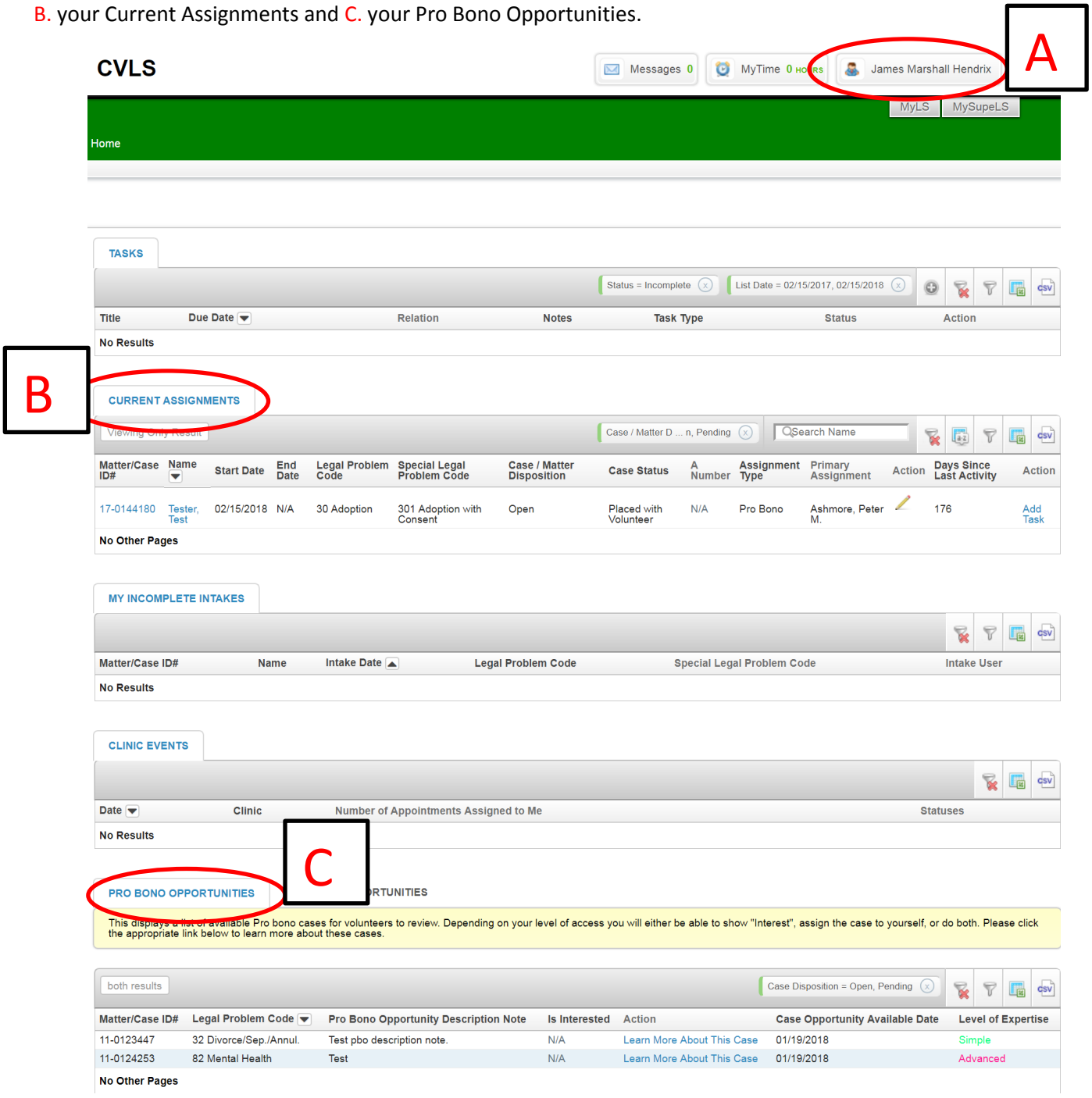


After changing your password you will see this screen. Don't worry about the "Permission Denied" message. Click on Home to go to your home page.

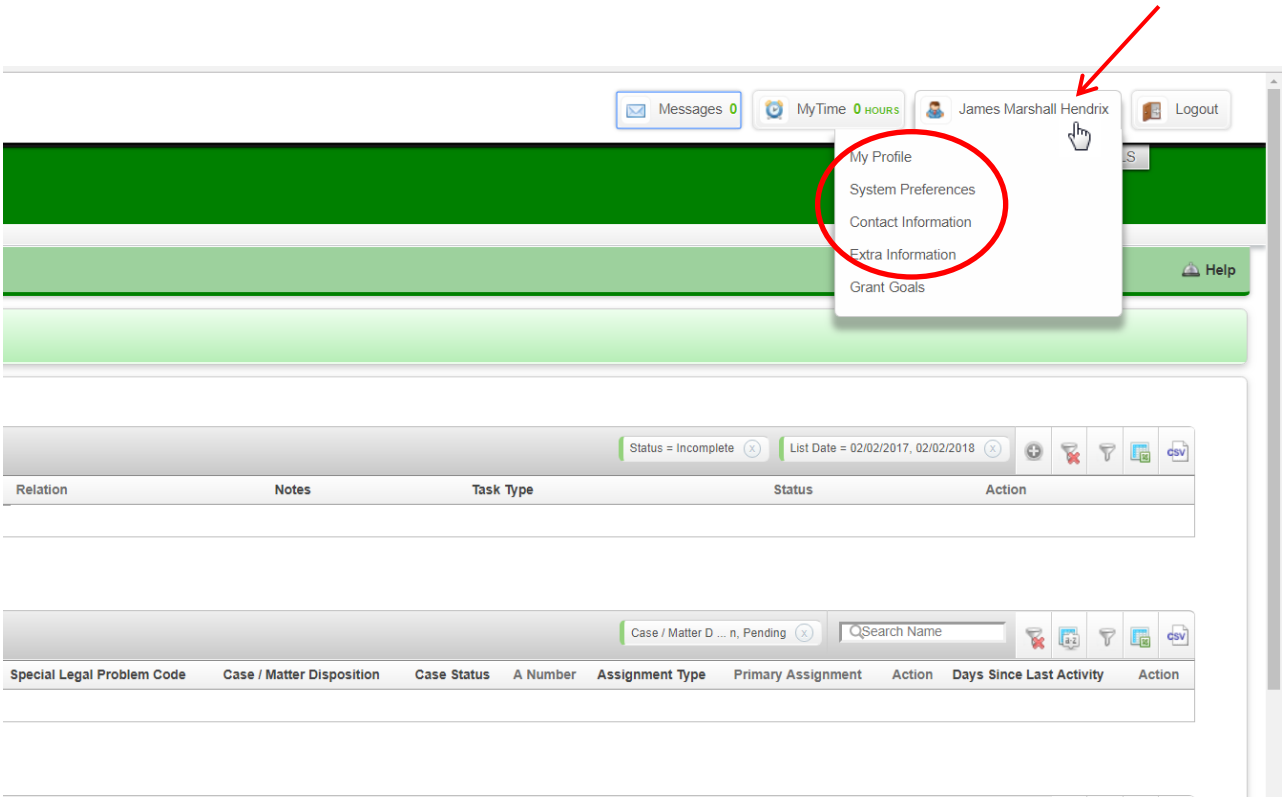


Home Page

The following is similar to what you will see on your Home page. The three most important features are A. your Profile, B. your Current Assignments and C. your Pro Bono Opportunities.

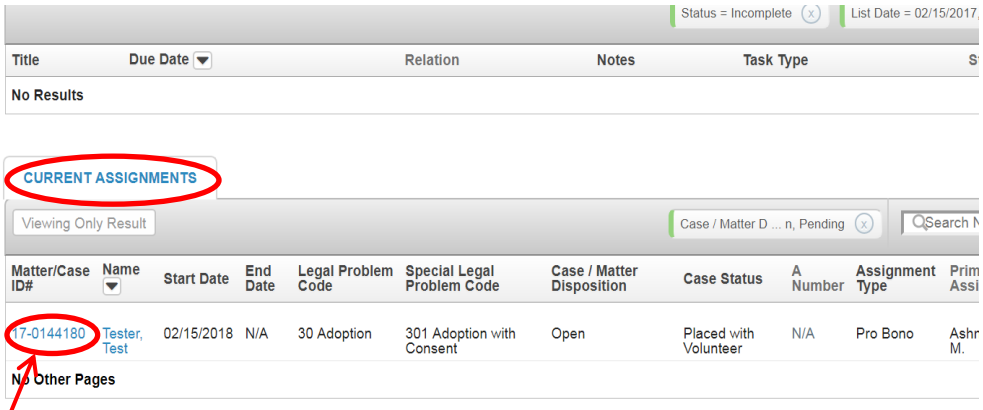


A. **Your Profile and Preferences.** Hover the cursor over your name and click a link to view your System Preferences and Contact Information.



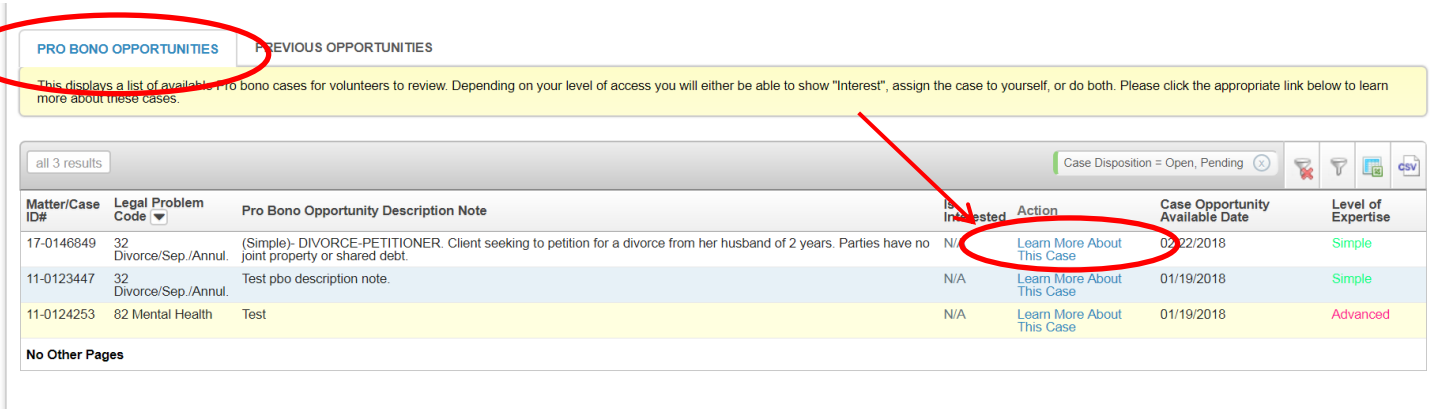
If you need to make changes to your Preferences or Contact information, contact CVLS. We will change the information for you until we enable LegalServer's edit feature for our volunteers.

B. **Current Assignments.** Under this tab you can see any current and open cases you have with CVLS.

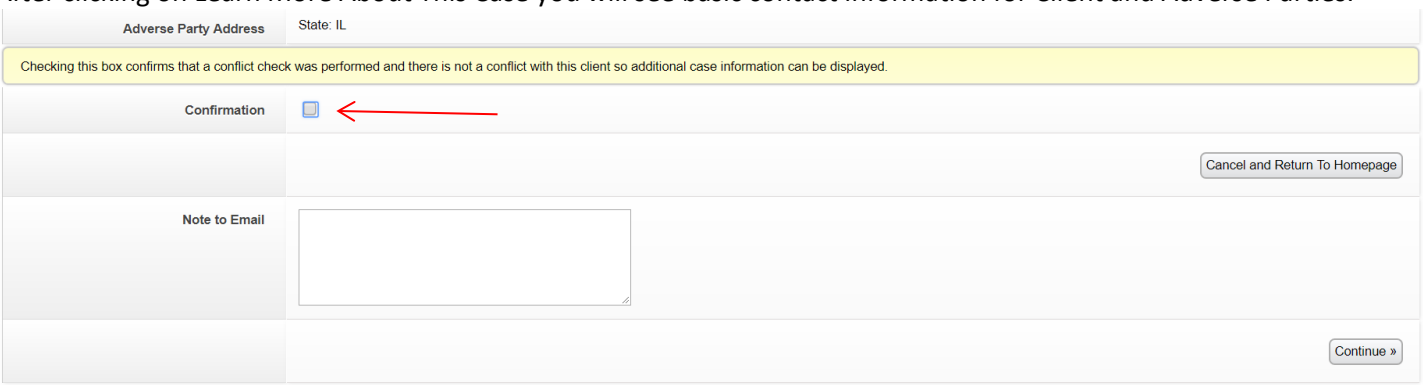


Click on the Matter/Case ID# to go to the Case Profile. See information related to **Case Profile** below.

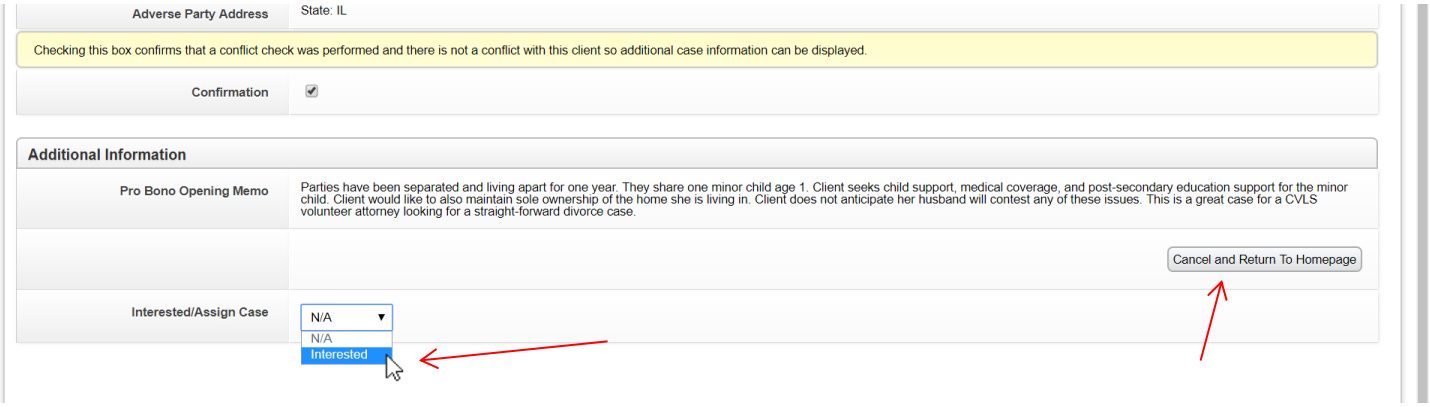
C. **Pro Bono Opportunities.** Available cases in the areas you indicated an interest serving appear here. Read the Pro Bono Opportunity Description Note and, for the cases you find interesting, click on the "Learn More About This Case" link. Follow the instructions to indicate to CVLS that you are interested in taking the matter.



After clicking on Learn More About This Case you will see basic contact information for Client and Adverse Parties.



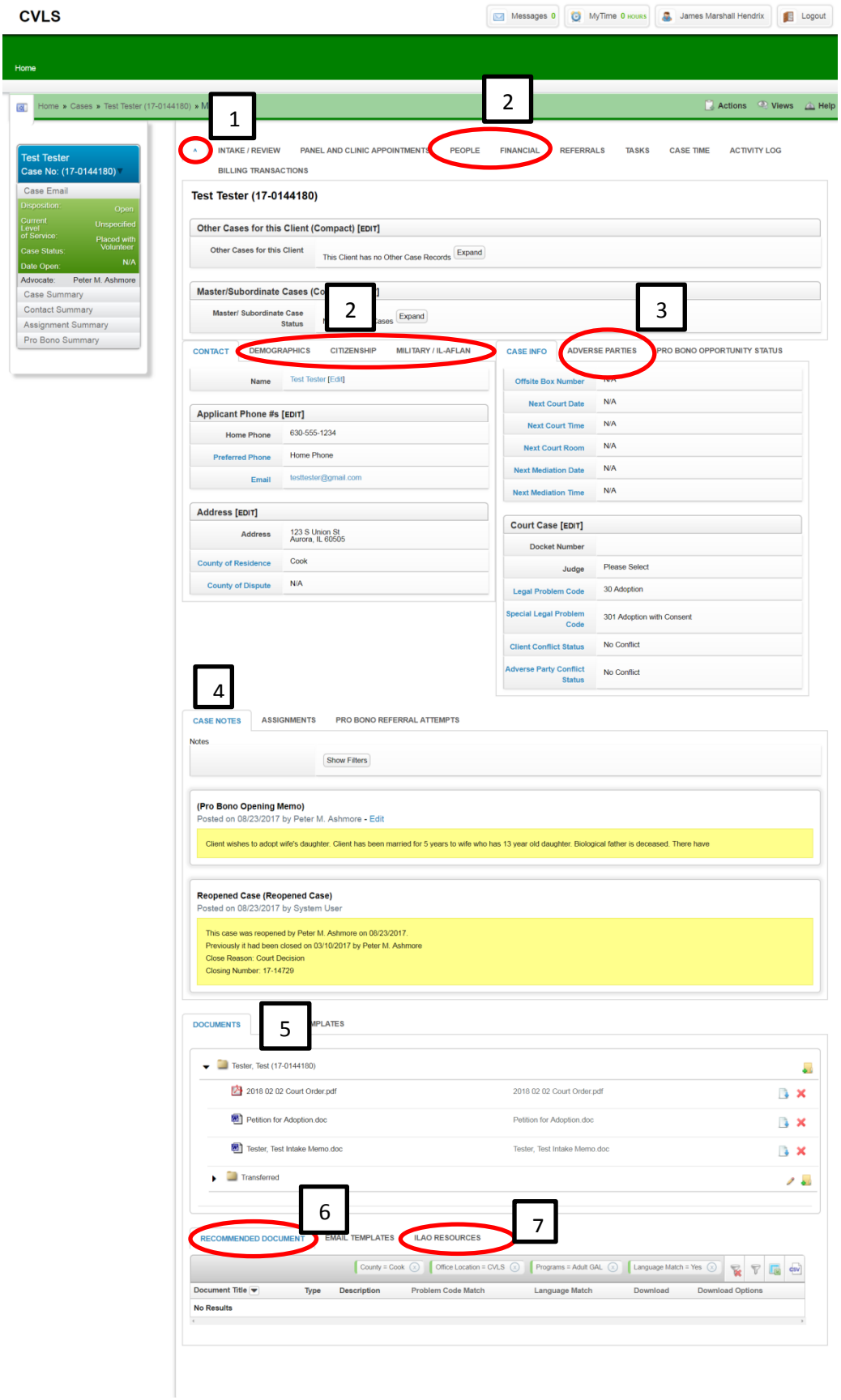
When you have determined you have no conflict after performing a conflict check, click Confirmation, and more detailed case information will be revealed. If you're interested in the case, click on the drop down menu and select Interested.



Enter any notes or comments you want to e-mail to the attorney in charge of placing the case and click Continue. Your interest will be e-mailed and the attorney or staff member in charge of placing the case will contact you.

If you discover a conflict with any party or are not interested in the case, simply click Cancel and Return To Homepage to exit the Pro Bono Opportunity.

Case Profile



1. The ^ tab will always return you to the basic case info.

2. These tabs provides additional information.

3. Click here to see Adverse Parties information.

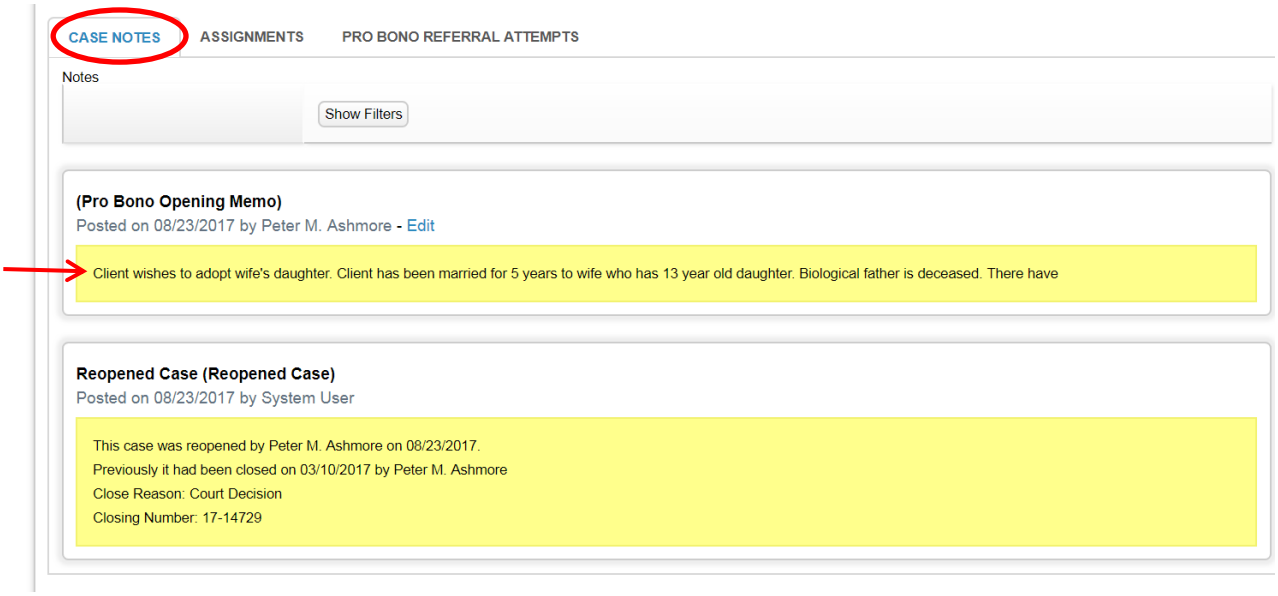
4. Here you'll see any Case Notes or Emails that have been added/sent to the Case Profile.

5. This is the Documents section. You can upload documents here. Click and drag a document or PDF from your computer desktop, and release the mouse over the client's name. The folder will be highlighted and then the document will be attached to the LS record. Attachments to Emails sent to the case profile will appear here as well.

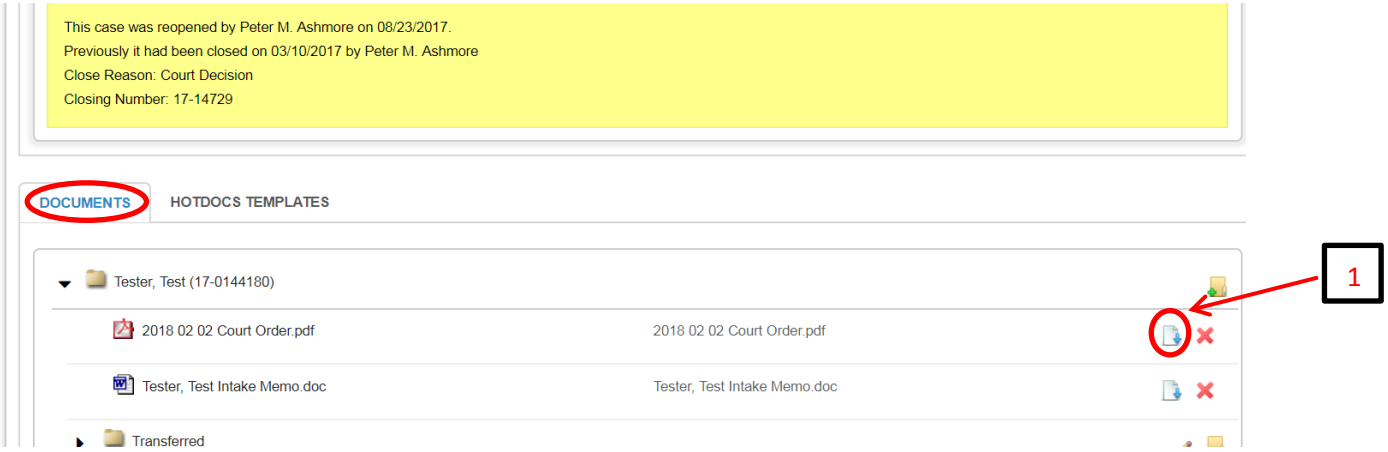
6. This is where you will find documents that LS can generate. CVLS uses this for form letters and some court documents. Depending on the case type, you might use a document in this tab.

7. Here you will find helpful training materials taken from ILAO's content.

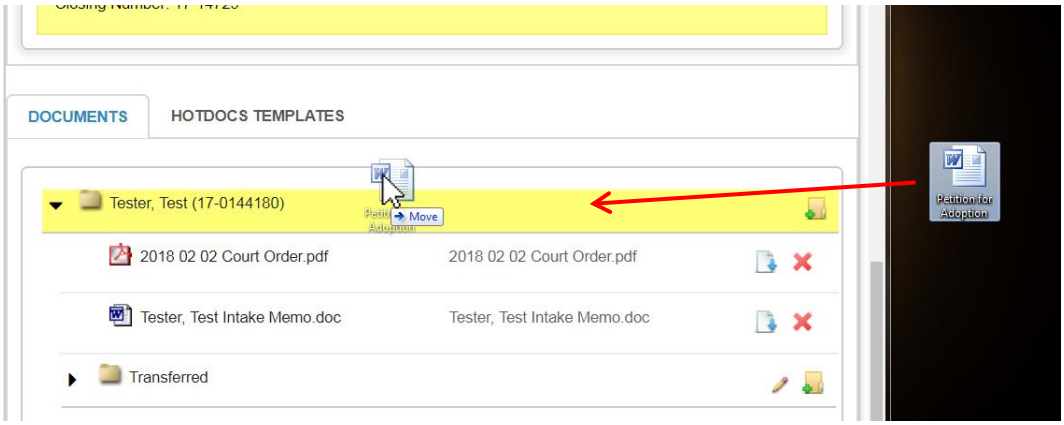
Case Notes are found by scrolling down in the Case Profile. They are easy to recognize by their yellow background. The initial Intake notes will be found here as well as Case correspondence by CVLS Staff and Volunteers.



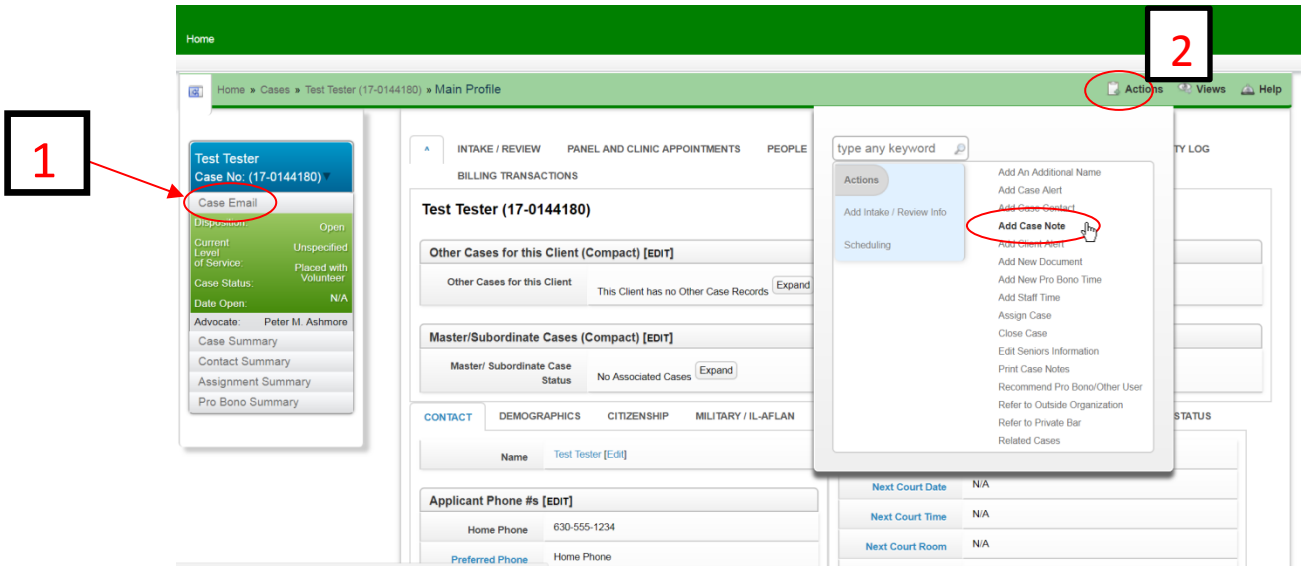
The **Documents** tab is directly below the Case Notes. ***Open*** or ***download*** a document by clicking the download icon 1 .



Upload a document to the Case Profile by clicking on and dragging a document from your desktop.

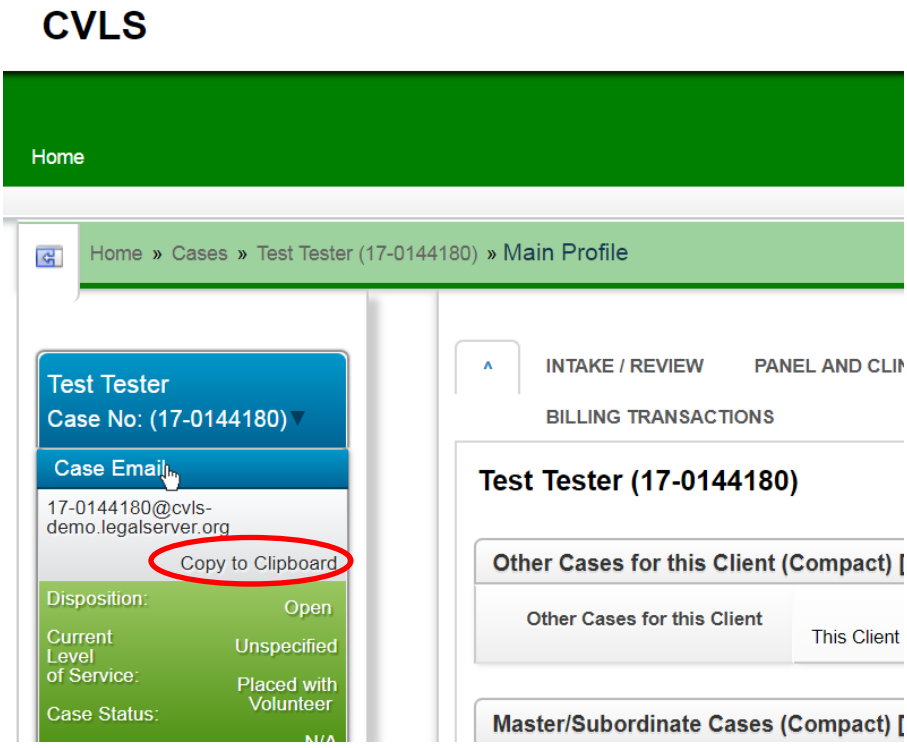


Adding a Case Note.



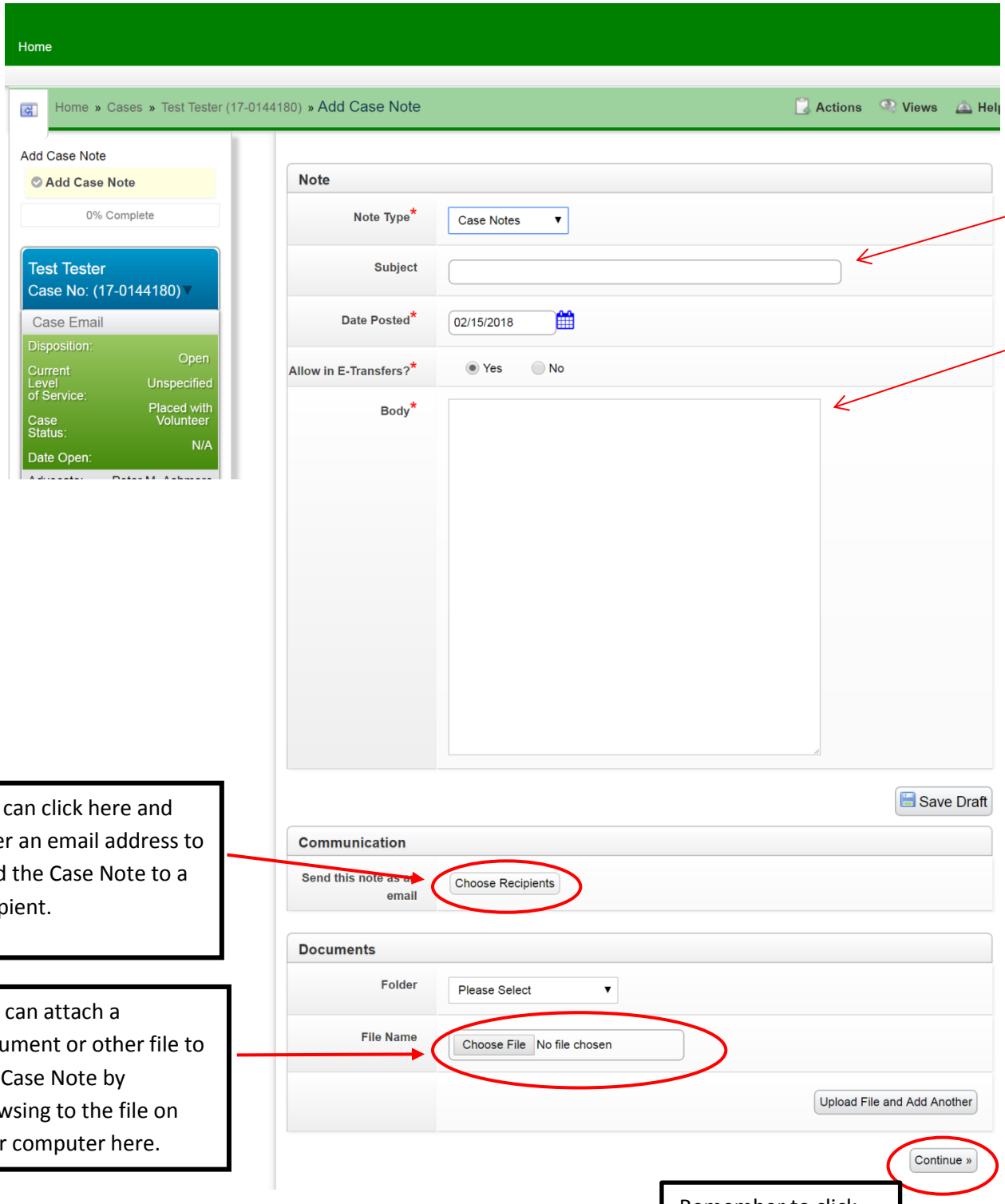
You may add a Case Note or Document via email. This is handy if you want to forward an email you receive from a client, opposing counsel or send a document attached to an email. You can do that by addressing the email to [LegalServerID#]@cvls.legalserver.org.

Always cc: the LegalServer case in order to include a copy of an email in the Case Profile. The LegalServer case ID can be found at the top of the Case Profile; however, the most efficient way to send an email to the Case Profile is to copy the email address by clicking Case Email 1 and choosing "Copy to Clipboard". You can then paste the address in the recipient address section of an email and be confident that the address is correct.



To add a Case Note without using the email feature, hover the cursor over the Actions Menu 2 and click on the "Add Case Note" link.

You can then use the Add Case Note form:



Add Subject and Body of the Case Note in these fields.

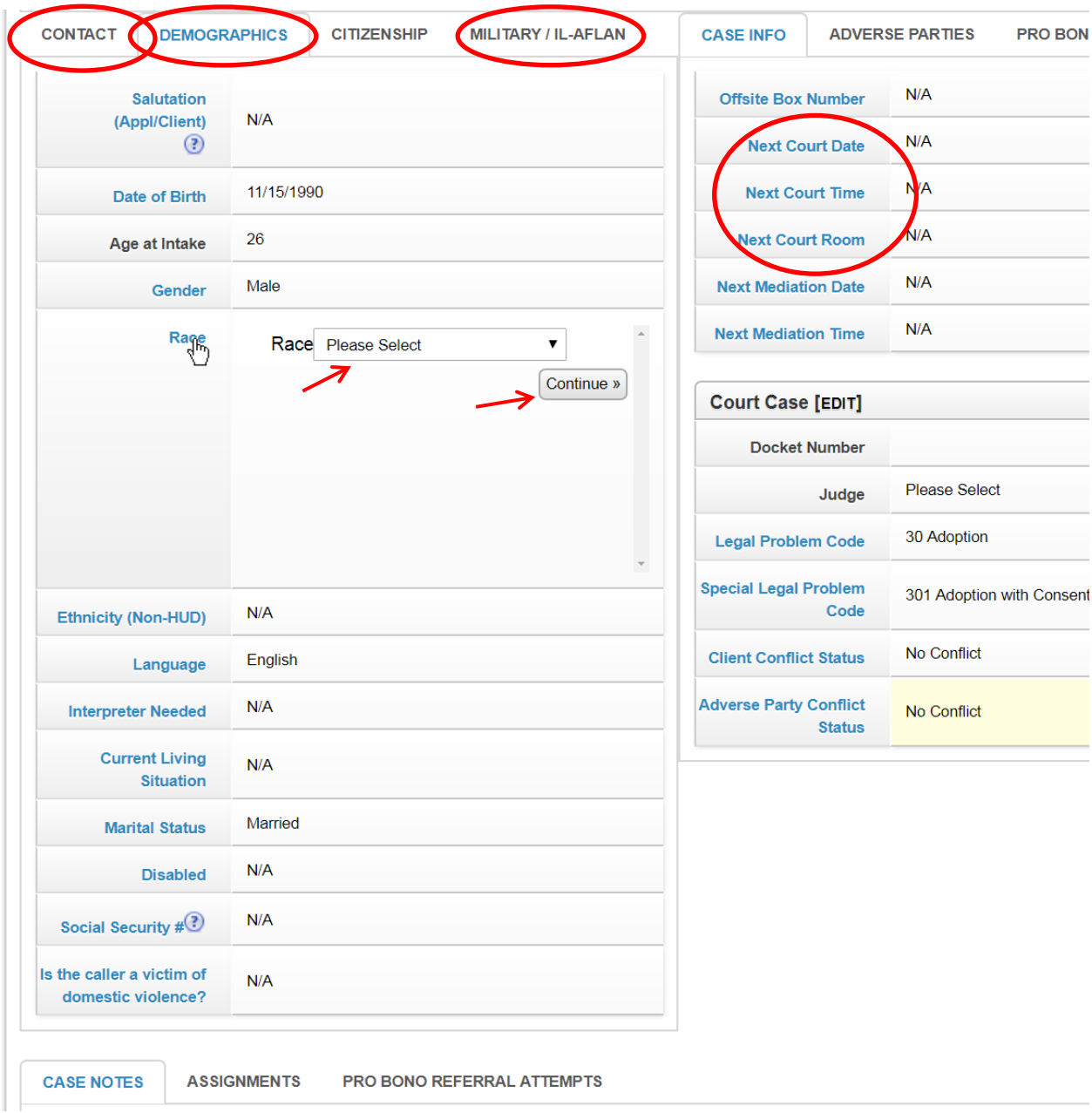
You can click here and enter an email address to send the Case Note to a recipient.

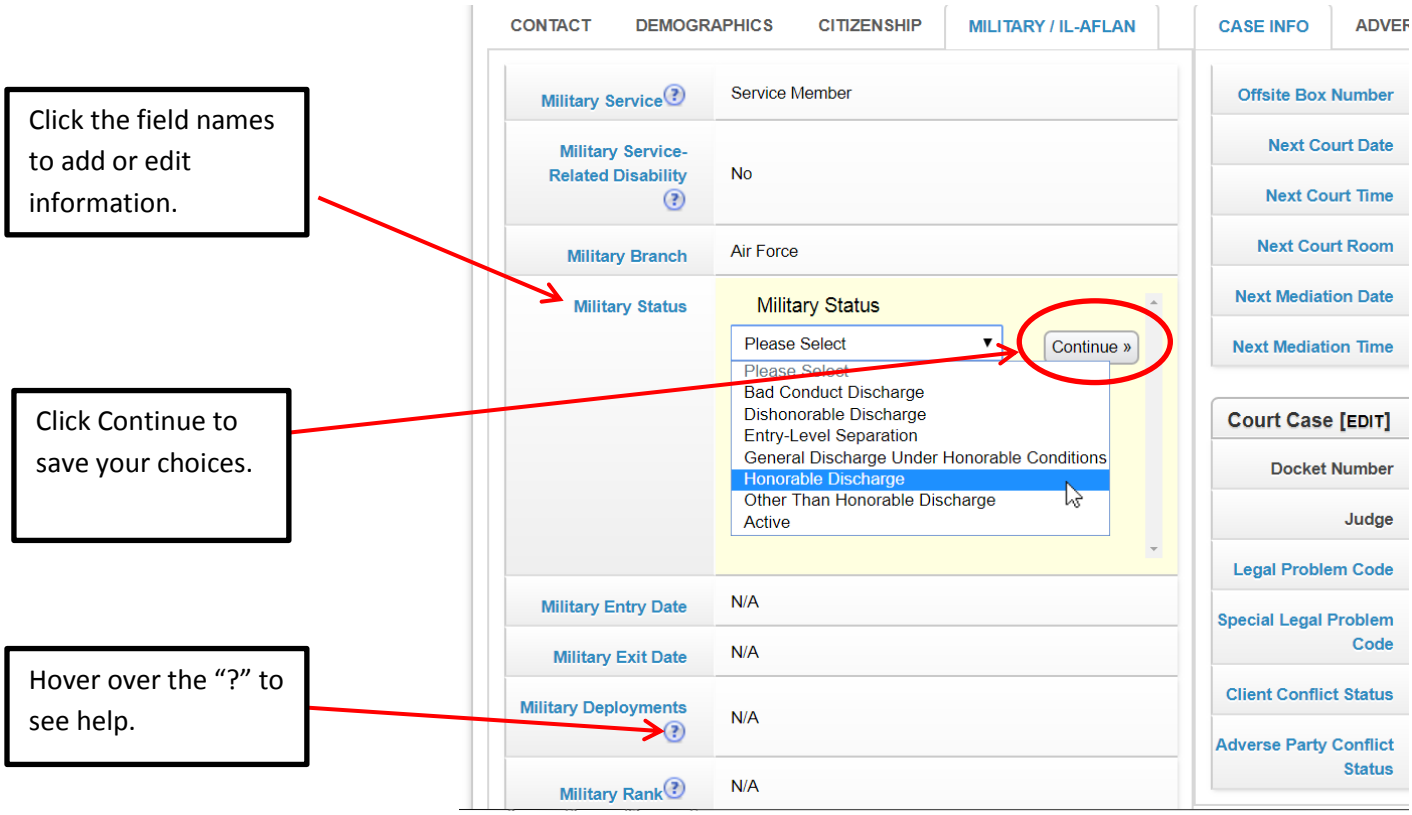
You can attach a document or other file to the Case Note by browsing to the file on your computer here.

Remember to click Continue to save.

Adding or changing case and client information.

PLEASE HELP CVLS REPORT IMPORTANT CLIENT DATA. This is ***critical*** for CVLS funding. Click on the blue field names. Most of these links will allow you to add or edit important client and case data.





THANK YOU for using LegalServer to manage your CVLS cases. We believe that LegalServer is indispensable for tracking client, case and volunteer data. We hope that you find it to be a helpful tool for your pro bono practice.

Remember that the more information you supply, the better we can report important data and improve client services and volunteer satisfaction. We want your Pro Bono experience to be a good one. Please let us know how we can help.