CVLS LegalServer Tutorial

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CVLS LegalServer 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.

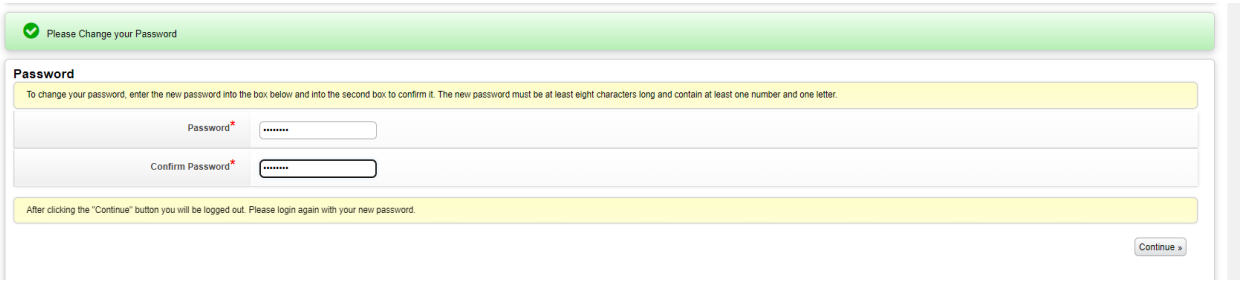
Information you provide by adding and updating information in your client's profile helps us improve client services and volunteer experiences. We understand that data and statistics are not attorneys' strong suite; however, our donors want client demographics, so helping us complete this information ensures continued funding for our programs.

Login

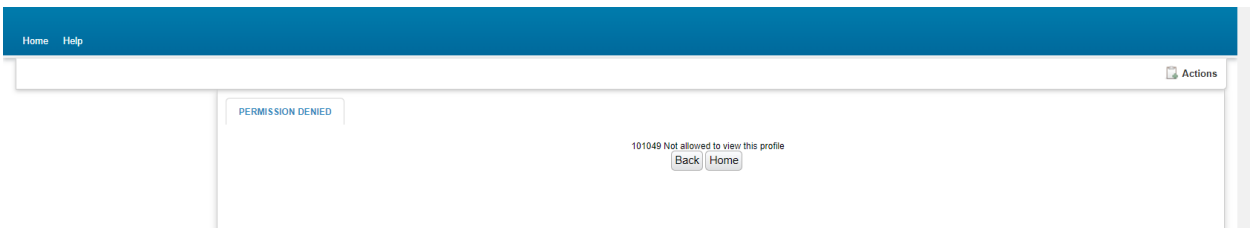
To login to LegalServer (LS) open your internet browser and nav9gate to https://cvls.legalserver.org.

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.

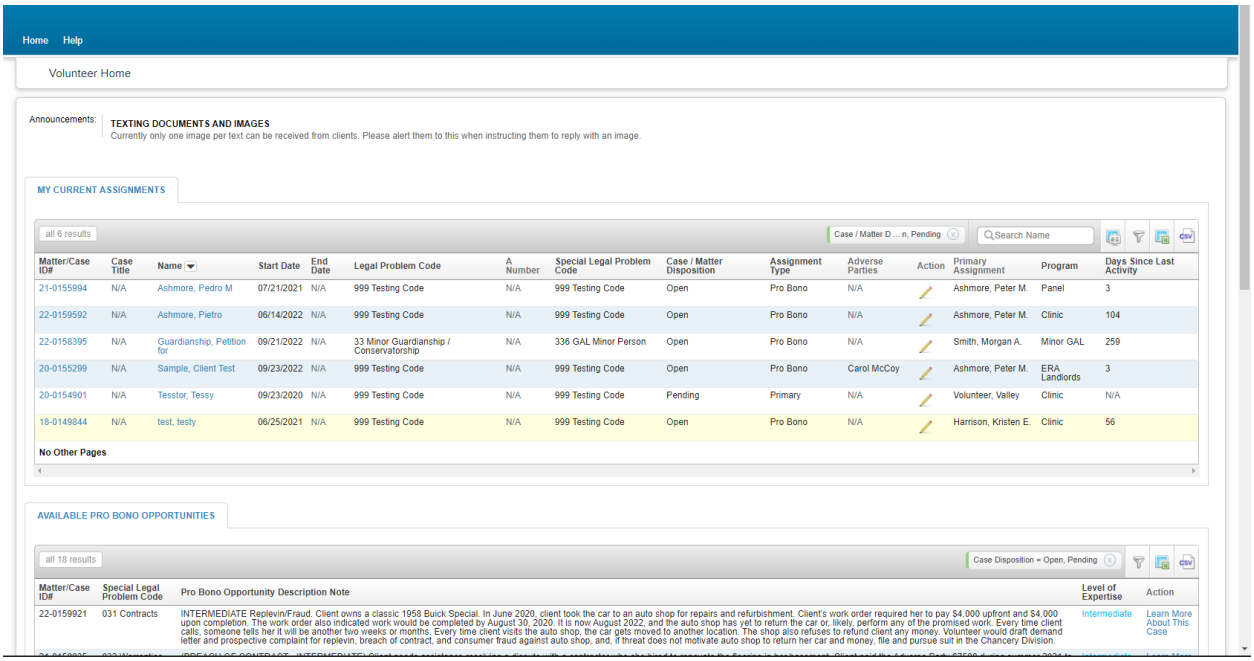


Home Page

The following is similar to what you will see on your Home page. This is where you access tour Current Assignments and the Available Pro Bono Opportunities.

Current Assignments. Click on the Matter/Case ID# to go to the Main Profile for the client's case.

Available Pro Bono Opportunities. Click on Learn More About This Case and follow the instructions to tell us you'd like to take a pro bono case!



Next: Main Profile . . .

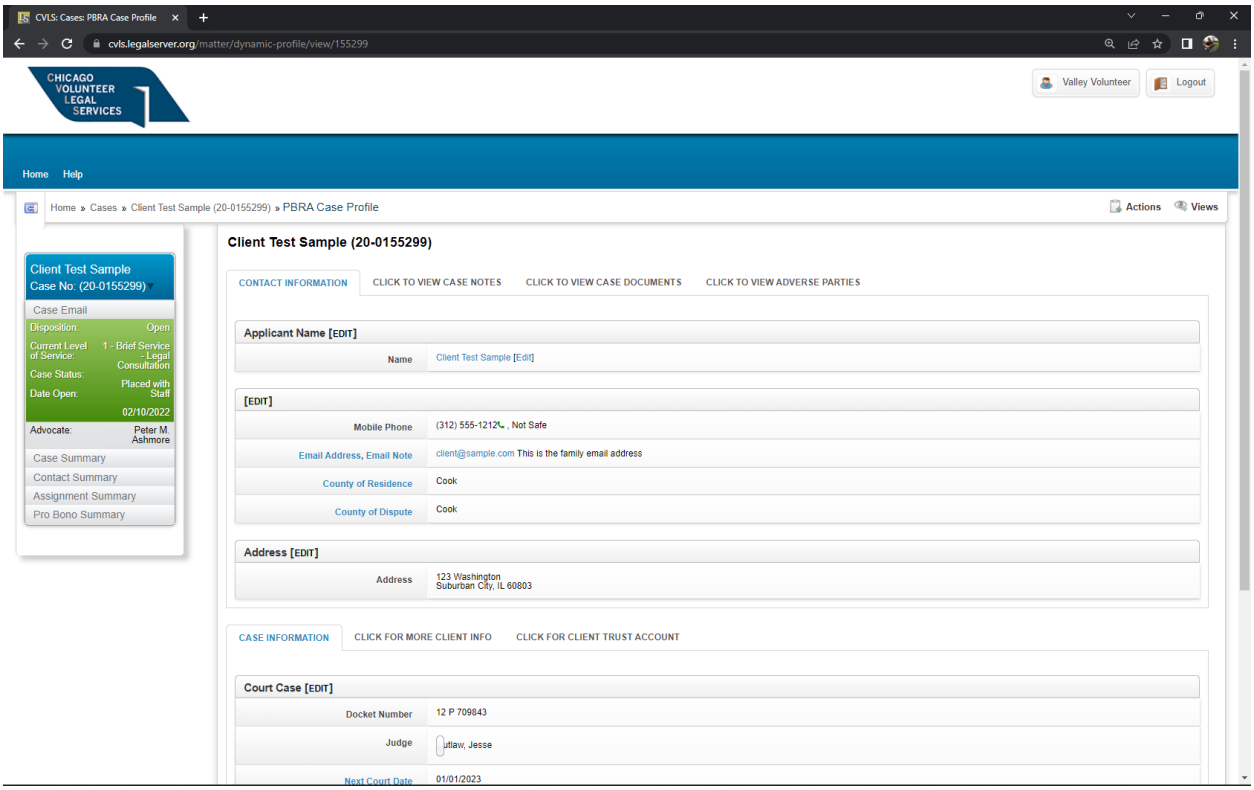
Main Profile

This is where all the information for a case exists. The Case Snapshot is on the left side and offers at-a-glance details about the case. The Actions Menu allows you to add notes, text the client and more. The Views Menu give you access to some printer-friendly documents.

The Tabs are descriptive and clicking each reveals the information described. You can Edit this information so it's always accurate. You can click on email addresses to send emails and use click to dial if you are viewing on your smart phone or your local settings allow telephone calls from your PC.

The Top Row of tabs contains Client Contact Information, Case Notes, Documents and Adverse Parties.

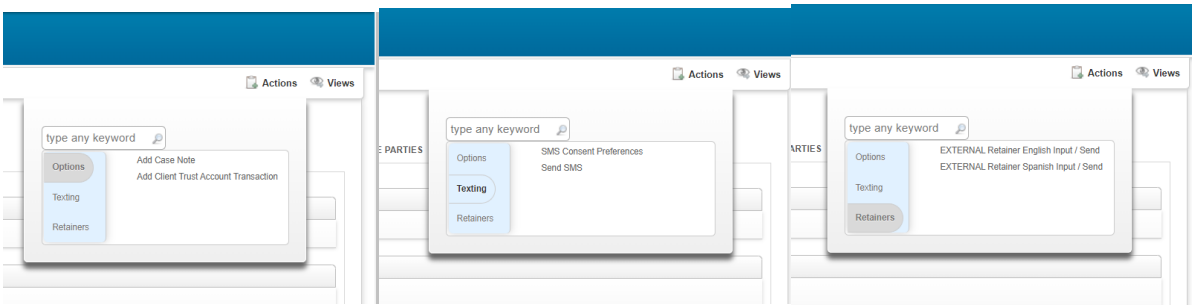
The Bottom Row contains Court Case Information, Client Demographics and Client Trust Account Log.



Next: Actions Menu and Views Menu . . .

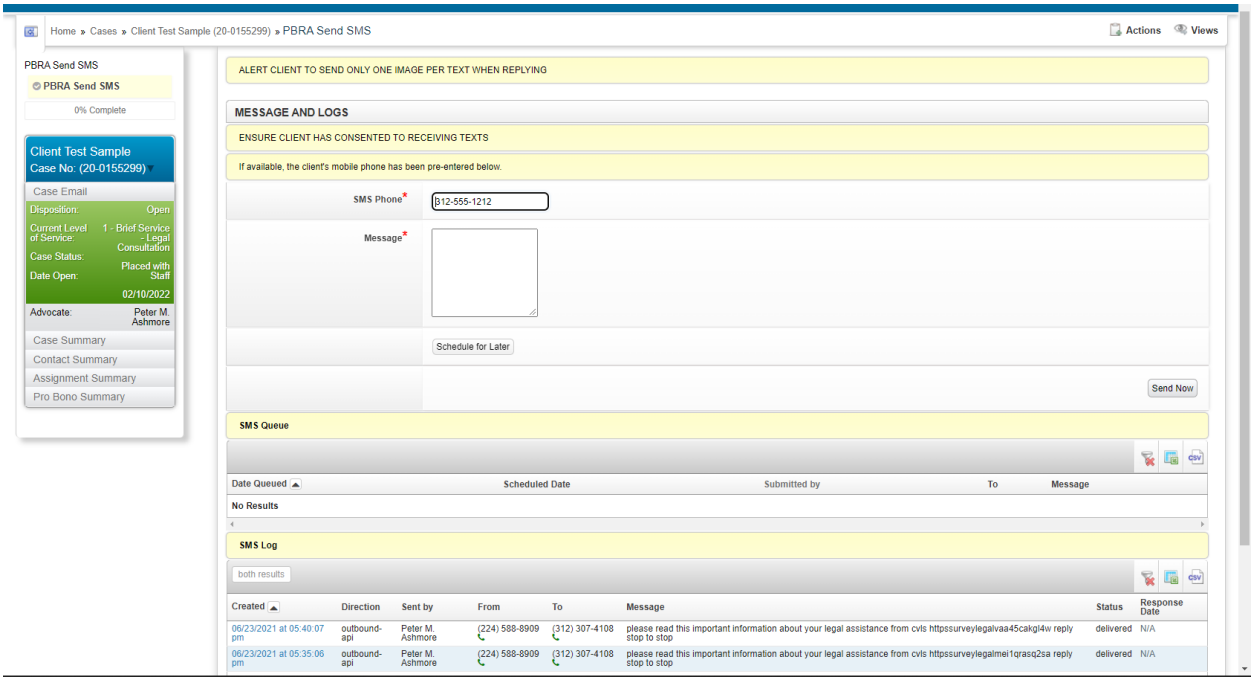
Actions Menu

This menu is located on the right side of the top bar and allows you to create Case Notes, send texts to your client and add deposits and withdrawals to your clients trust account log.



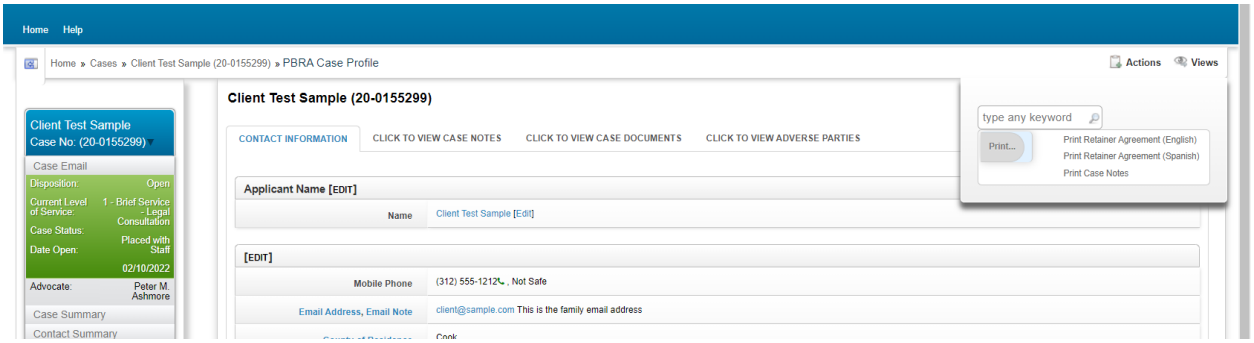
Texting**.** Before texting your client ensure that the client agrees to receive text messages. Go to SMS Consent Preferences to record their agreement and verify their mobile phone. The click Send SMS to text the client. Clients can reply to your text with one photo or document per text which will be added to the Case Notes section.

You can choose Send Now or Schedule for Later depending on when you want the text to be sent. The Queue and Status Logs are diplayed at the bottom of the page.



Views Menu

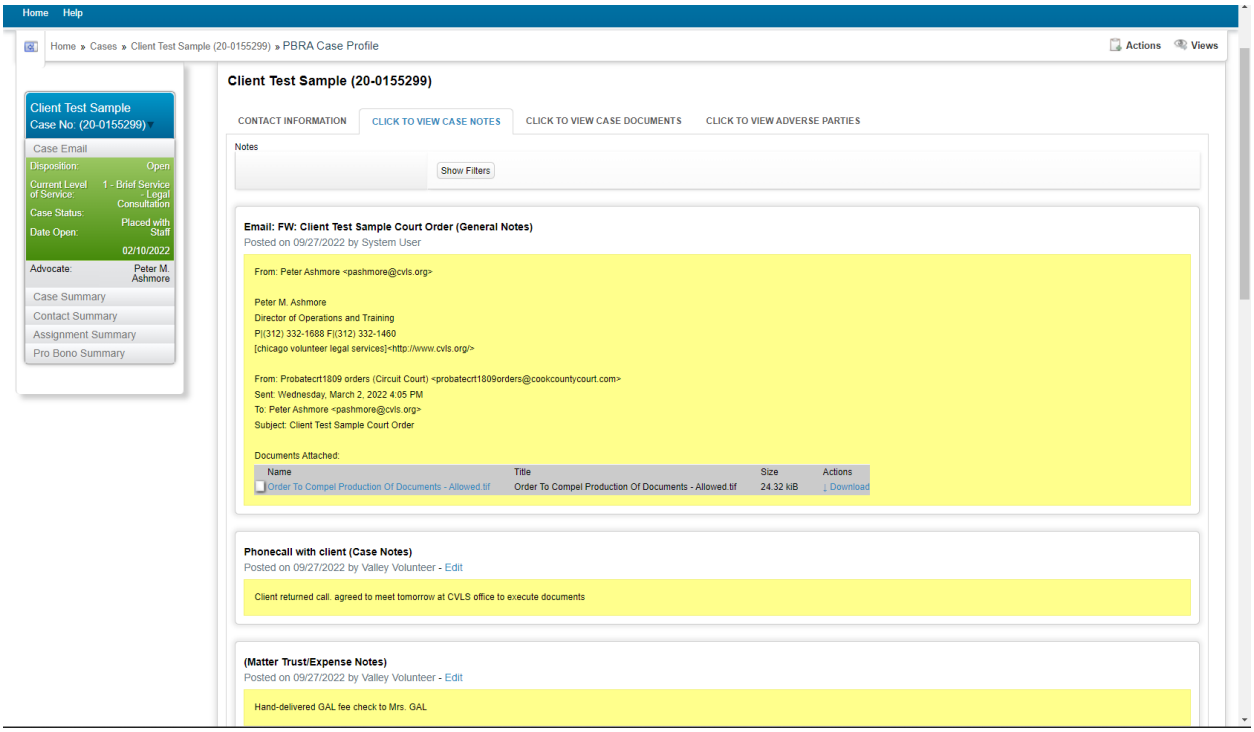
This is where you can access layouts that are printer friendly.



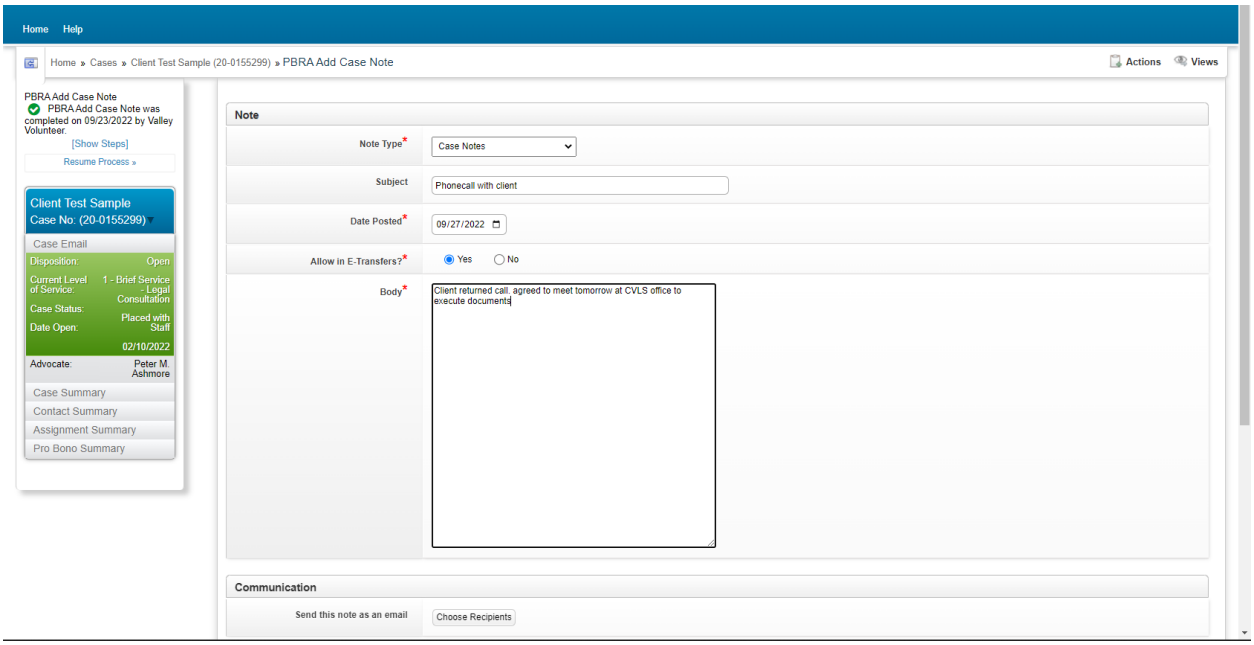
Next: Case Notes . . .

Case Notes

We all use notes. They are indispensable for keeping track of the progress of your case and recording conversations or correspondence. Case Notes is the LS equivalent of a legal pad, as well as a repository for email and text correspondence.

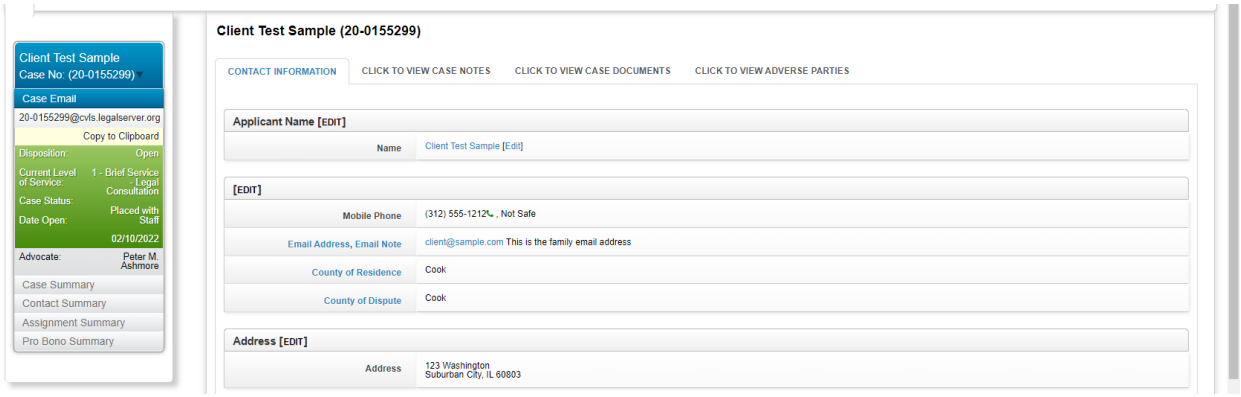


You can create a Case Note by using the Actions Menu and clicking on Add Case Note.



Make sure you click on Continue to save your Case Note to the profile.

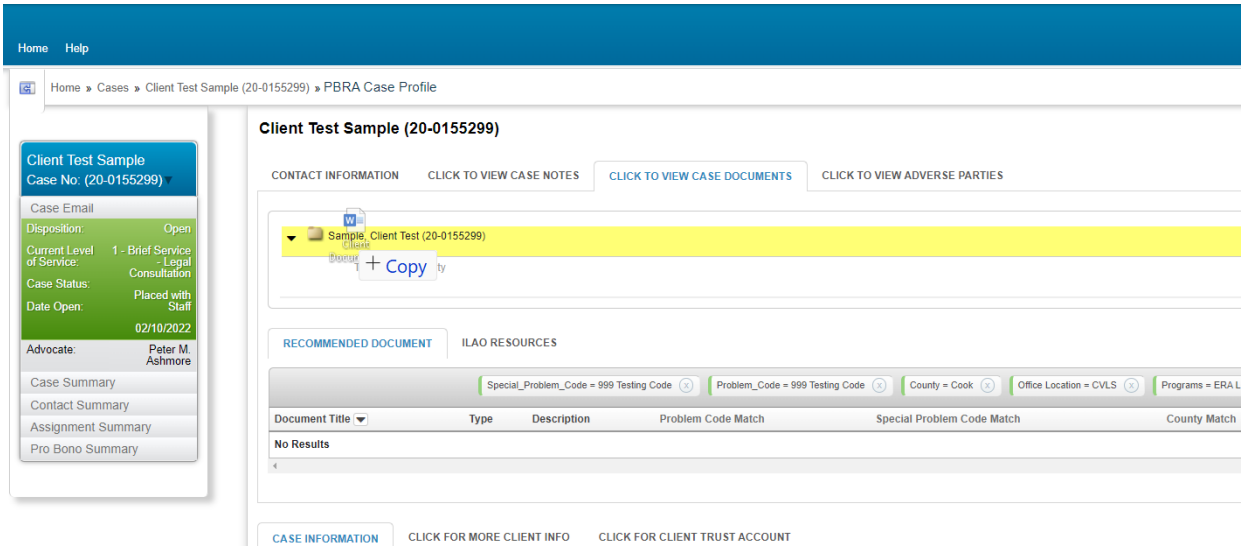
You can also create a Case Note by emailing the case profile. This is especially handy when forwarding emails with client documents attached. Click on Case Email in the Case Snapshot then click Copy to Clipboard. You can now paste the Case Email into the To: field of your email.



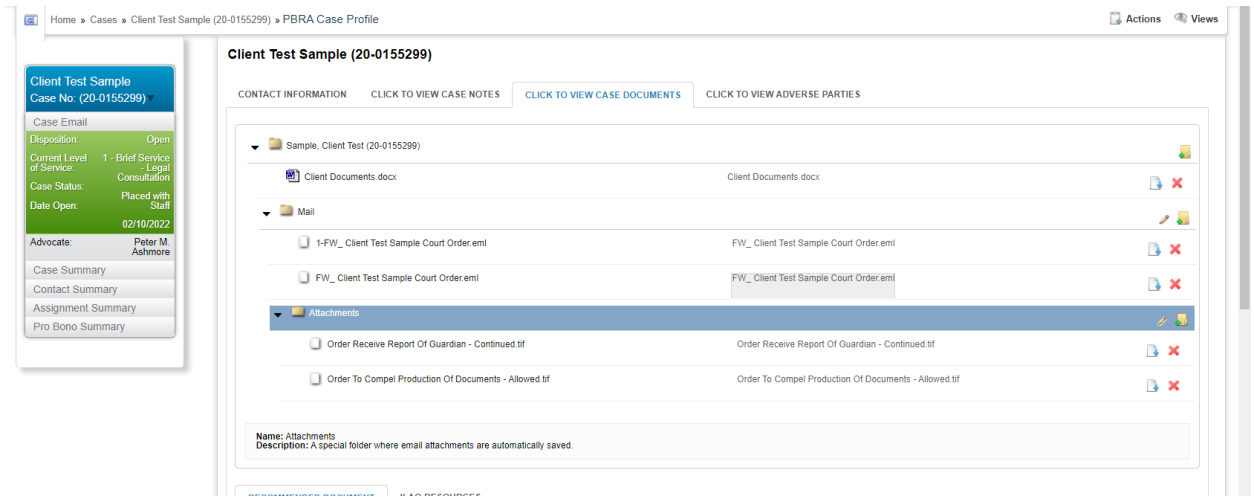
Next: Documents . . .

Documents

You can find all the documents that have been uploaded to the case profile here. These include documents the client provided in their initial interview as well as Court documents and, in some cases, a Case Memo of the client's legal problem. You can add documents by dragging and dropping into the client's document folder from your device.

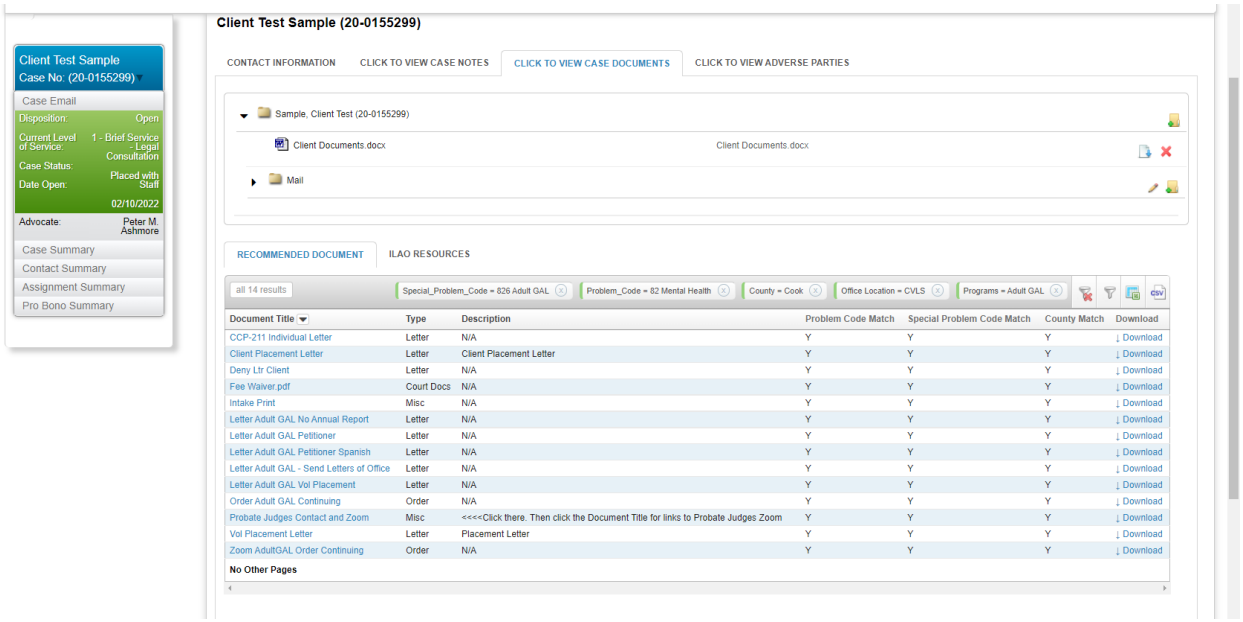


You can also forward emails with attachments to the case profile in the manner described above for emailing Case Notes. Just forward the email to the Case Email address. When forwarding attachments, those documents will be located in a Case Note AND in the Mail and Attachments subfolders in the Documents tab.



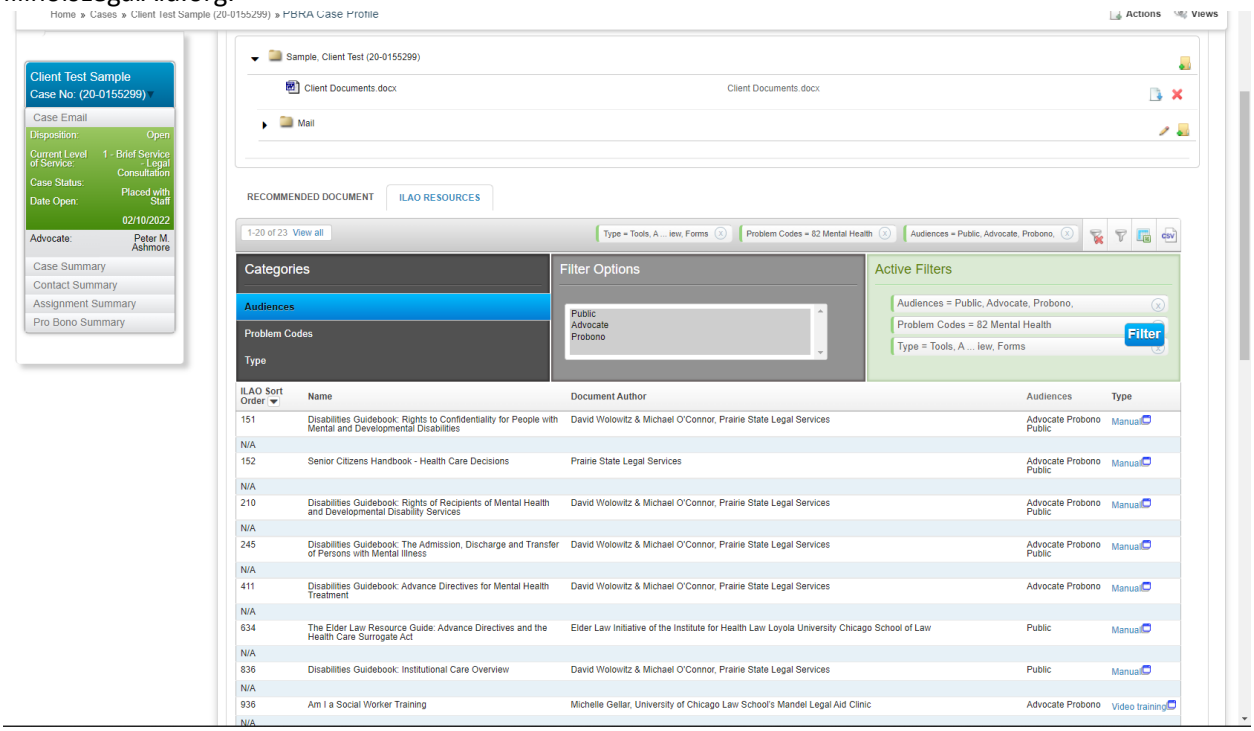
Recommended Documents

Within the Documents Tab, this tab displays documents and templates that *might* be helpful to you. The documents are displayed based on the case data and more documents are displayed as you delete the filters. Clicking the Download link at the right side will download the document or template for you to edit, potentially saving you time.



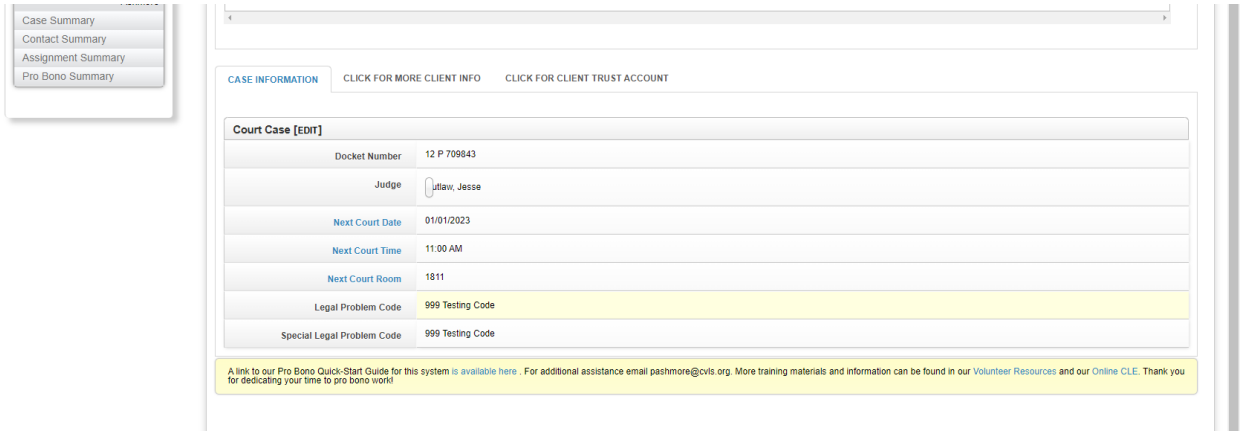
ILAO Resources

This tab, also within the Documents Tab, displays resources and training content from IllinoisLegalAid.org.



Case Information

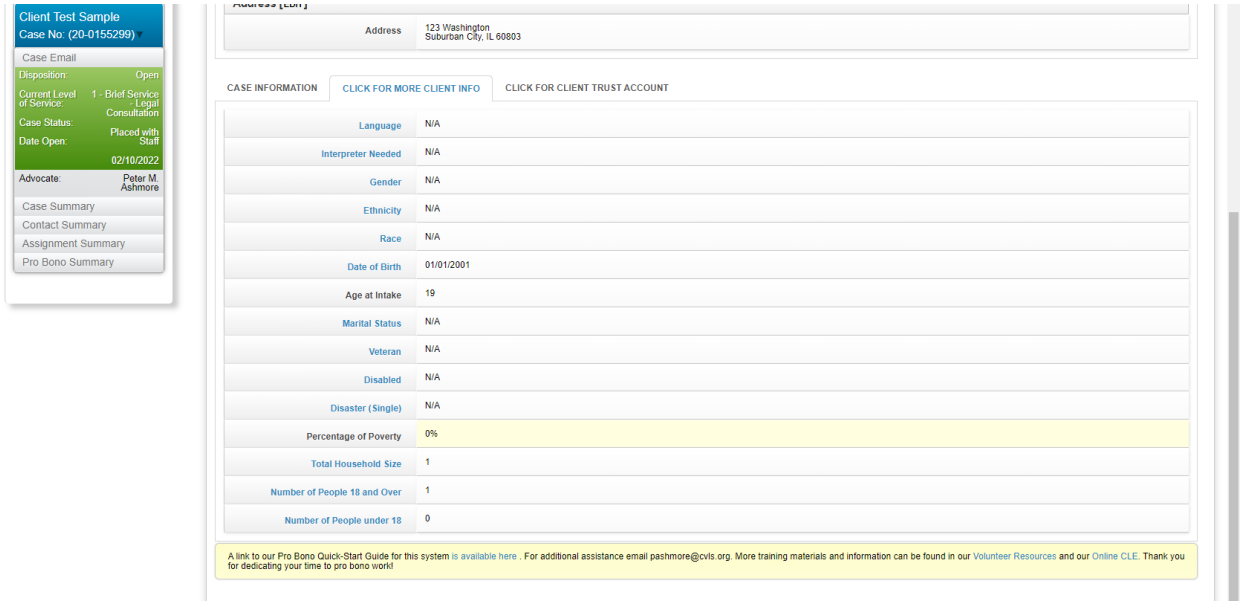
Update the court case information here so that you always know when your case is in court.



Next: Client Demographics . . .

Client Demographics

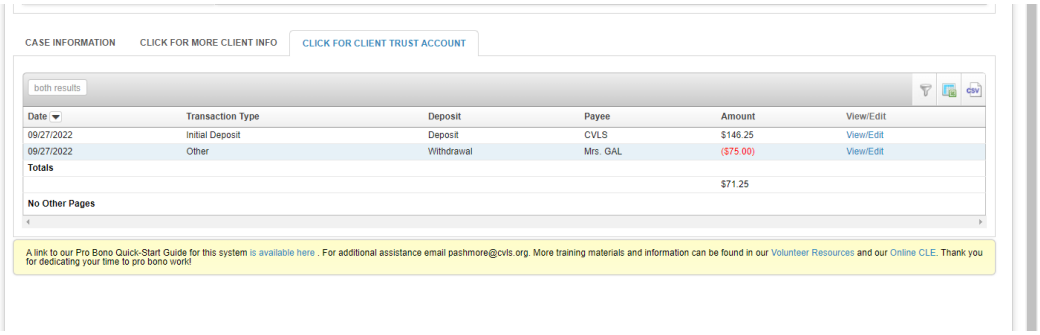
Earn a gold star by helping CVLS collect and record data in the More Client Info tab.



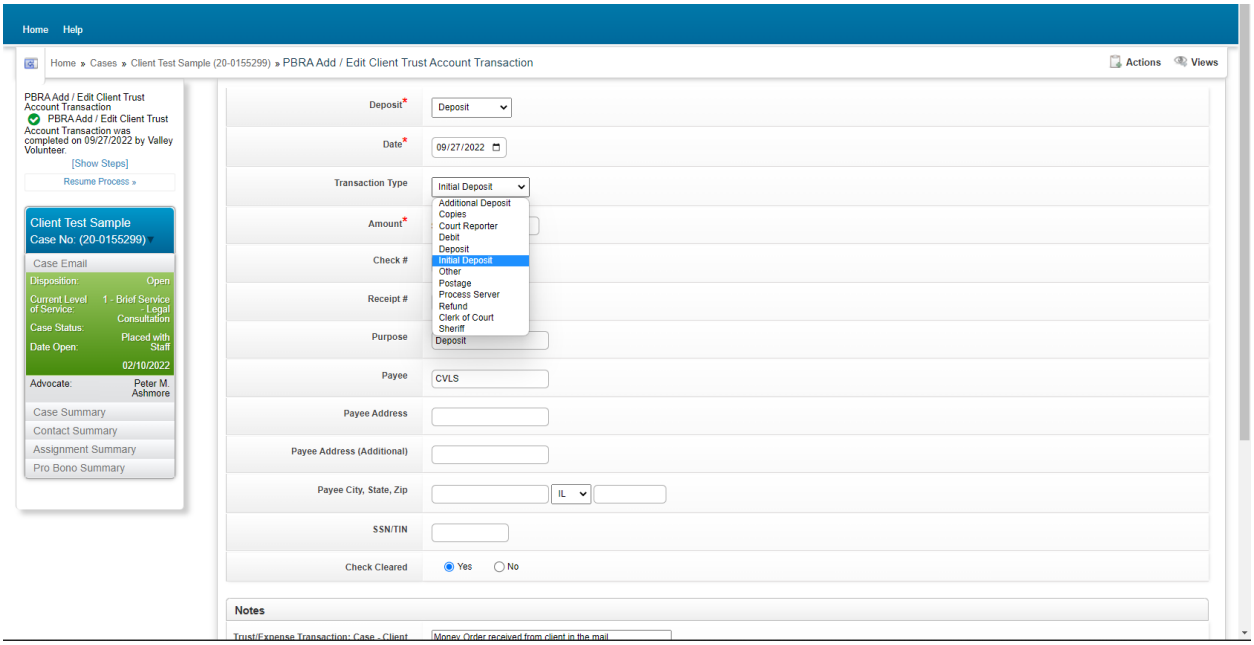
Next: Client Trust Account . . .

Client Trust Account

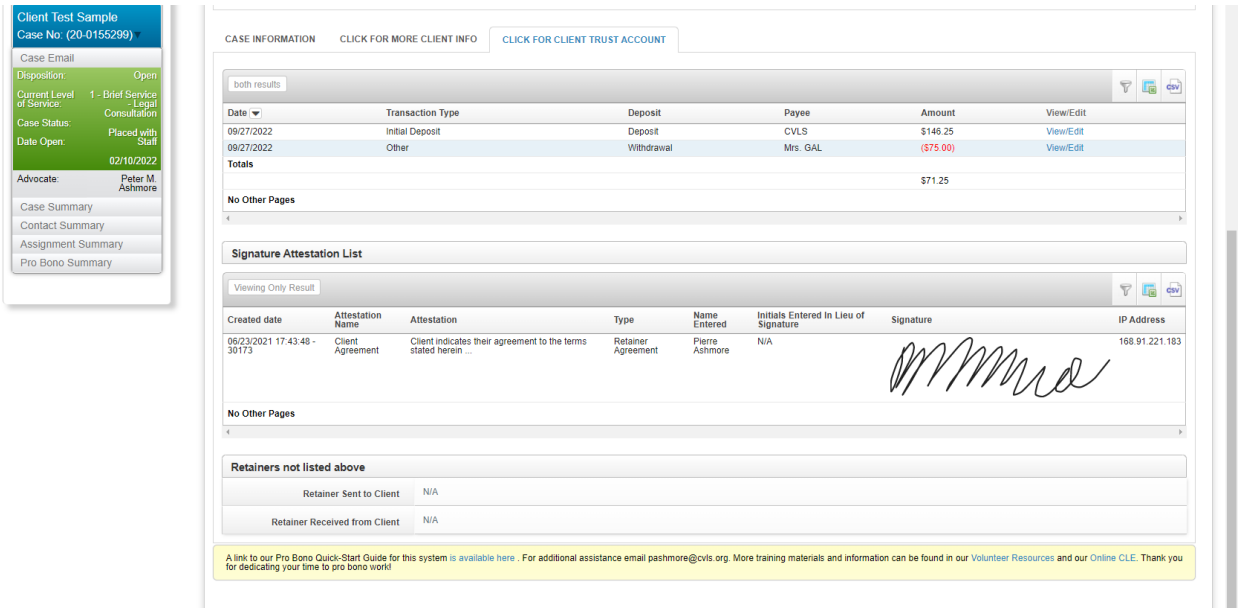
Some, but not all cases have non-waiveable fees associated with them. An example of this type of case is Adoption. You can view the client's deposits and withdrawals in the Client Trust Account tab.



You can add client trust account transactions by clicking Add / Edit Client Trust Account Transaction process in the Actions Menu. Use this to help keep track of fees for your client's case.



Retainers and Signature Attestation List

Some cases will display data in the Signature Attestation List which indicates that the client has signed a Retainer.

It is ONLY necessary for you to use the Retainer processes in the Actions Menu if you have been told by staff to do so. Click here to view the Retainer Instructions.