

FAMILY LAW LEGAL CONSULT PROJECT PROCEDURES

STEP ONE: INTAKE FORM

1. There are two ways that you can access the intake form. The intake form can be found on the CCADV website in the Members Resources section or by clicking on to the following link:

[INTAKE FORM](#)

2. Complete the entire INTAKE FORM with the client. The more information that is available, the more the consult attorney can prepare and thus provide a comprehensive consult.
3. The INTAKE FORM will submit automatically once you select “submit” and will no longer be available to you to save, print, or to refer to in order to ensure information on this form is privilege protected.
4. After you have submitted the INTAKE FORM, move on to the REFERRAL FORM.

STEP TWO: REFERRAL FORM

1. There are two ways that you can access the referral form. The referral form can be found on the CCADV website in the Members Resources section or by clicking on to the following link:

[REFERRAL FORM](#)

2. Complete the REFERRAL FORM with client. The REFERRAL FORM will also be submitted electronically. If you require a hard copy of the referral form for your records, you can print a REFERRAL FORM from the CCADV website but you will not be able to submit the hard copy. The referral form must be submitted online.
3. The REFERRAL FORM and the INTAKE FORM must be submitted on the same business day to commence the referral process. *Please note: The referral will not be accepted and processed until both forms are submitted.*

STEP THREE: CONFLICTS CHECK

1. The Legal Projects Coordinator will submit the REFERRAL FORM to the consult attorney for a conflicts check. The consult attorney will notify the Legal Projects Coordinator of the results of the conflicts check.
 - a. If there is NO conflict:

The Legal Projects Coordinator will inform the referring advocate of:

- 1) The consult attorney's name
- 2) The consult attorney's contact information
- 3) The procedure for that consult attorney (i.e., contact at firm for this project, client to contact attorney or attorney to contact client, etc.).

For questions or more information, please contact...

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- b. If there IS a conflict:

The Legal Projects Coordinator will inform the referring advocate that there is a conflict, and that the referral will be sent to another consult attorney and this referral will be submitted until there is no conflict.

Once the consult attorney is identified, the Legal Projects Coordinator will inform the referring advocate of:

- 1) The consult attorney's name
- 2) The consult attorney's contact information
- 3) The procedure for that consult attorney (i.e., contact at firm for this project, client to contact attorney or attorney to contact client, etc.).

STEP FOUR: WAIVER FORM

- 1) After the referral has been accepted, the referring advocate shall complete and return the WAIVER form to the Legal Projects Coordinator who will provide the completed WAIVER to the consult attorney.
- 2) The WAIVER FORM can be found on the CCADV website in the Member Resources section or you can click on to the following link:

[WAIVER FORM \(English\)](#)

[WAIVER FORM \(Spanish\)](#)

Please note: The waiver form must be completed to ensure that the client understands that the consult attorney will not and does not represent them in any legal matter outside the consultation. No consultation will take place without a completed WAIVER Form.

- 3) The Legal Projects Coordinator will follow up with the referring advocate two business days after the waiver is received to ascertain if liaison coordination is needed and for information relative to the date and time of the scheduled consultation.

STEP FIVE: ADVOCATE SURVEY

1. The Legal Projects Coordinator will send a link to the ADVOCATE SURVEY to the referring advocate when notified of the consultation date/time and ask for it to be completed and returned promptly.

STEP SIX: CONSULTATION

1. At this point in time, the consult attorney will have received the INTAKE FORM and other pertinent materials. The consult will then take place with the client.
2. At the conclusion of the consultation, the attorney will refer the client back to the referring advocate for continuation of services. The advocate will already have the date/time of the consultation and should follow up immediately with the client.
3. The referring advocate will provide the client with the CLIENT SURVEY and encourage and assist with its completion and submission. There are two ways that you can access the client survey. The client survey can be found on the CCADV website in the Members Resources section or by clicking

on to the following link:

[CLIENT SURVEY \(English\)](#)

[CLIENT SURVEY \(Spanish\)](#)

Please Note: This survey will measure not only how this project is working, but more importantly, it will let us know what is needed after the consultation. Additional funding for what may be needed after consultation may be victim centered and following up with the client to ensure surveys are submitted is critical to the continuation of the project after the grant term and to seek sources of additional funding for further client needs.