SUNCOAST COMMUNITY LEGAL SERVICE

CLIENT APPOINTMENT PROCESS FOR REMOTE WORKING

BOOKING APPOINTMENT

- Record appropriate voicemail message on reception phone requesting clients to leave a message or go to the website booking page. Either retrieve message from phone remotely or listen to the audio wave file message that the phone system has emailed to you.

- Return call to client. Collect personal details and other party details. Undertake conflict check. If conflict exists, refer to another service and record as an information. If no conflict, create client record in CLASS and enter all required details. Do not create service record until after appointment.

- Enter customer's name and subject matter details into EXCEL appointment spreadsheet in OneDrive and advise client of appointment time while still on the phone.

BEFORE APPOINTMENT

- Email/post Client Agreement to client

- Send SMS appointment reminder to Client (only follow up 'no' responses)

- Set up individual folder for each Lawyer in OneDrive of Microsoft 365

- Download Client Form (XLSX format) from CLASS into the Volunteer Lawyer's OneDrive folder – add appointment date & time to form – highlight relevant sections for lawyer to complete. Cut and paste subject matter from the EXCEL Client appointment spreadsheet into the relevant section of each client form. When naming the client form, use the client's name and appointment time (and put 'incomplete' in the file name), so lawyer knows the time of each appointment without having to open each file.

- Email reminder to Volunteer Lawyer day before (just in the subject line: "Reminder: You are rostered to volunteer next Tuesday 31 March, thanks!"

- Share the link to OneDrive folder with the Volunteer Lawyer on morning of appointment with 24-hour expiry to link – message is received when lawyer opens the link.

- Volunteer Lawyer calls the client at the pre-arranged time and completes Client Form online immediately after client appointment. They do not have to print, save, or scan the form, just enter information and close. The link will expire in 24 hours which means so no confidential client information is saved on volunteer's computer or in their email system.

AFTER APPOINTMENT

- Follow up completion of Client Forms from Lawyer. Amend the 'Incomplete' in the file name to 'complete' when document has been uploaded to CLASS. This way, a search for 'Incomplete' will identity any client forms that have not been uploaded to CLASS.

- Create Client Service in CLASS

- Upload Client Form to CLASS

- Email client with link to donation and feedback page on website

- Staff lawyer runs countersigning report daily from CLASS which identifies outstanding client forms to be checked.

- When the staff lawyer completes the countersigning, they check the countersigning box in CLASS so that the client does not appear in the next countersigning report.