The Next Frontier: Utilizing Technology to Maximize Pro Bono

- Melissa Fuechtmann, Prairie State Legal Services, Inc., Wheaton, IL
- Stephanie Villinski, Illinois Legal Aid Online, Chicago, IL
- Marisa Wiesman, , Wheaton, IL

Organizations often put as much time into a pro bono case as does the volunteer. This session will explore Prairie State Legal Services’ partnership with Illinois Legal Aid Online to leverage technology, including online intake, an online volunteer opportunity portal, and eLearning courses, to maximize its pro bono resources. Attendees are encouraged to bring a laptop, iPad, or other device to test out the technology during the presentation.
Prairie State Legal Services Online Access System

Test Application Instructions and Triage Rules Sample

If you would like the see how our online access system works, you can do a test application any time.

From [www.illinoislegalaid.org](http://www.illinoislegalaid.org) or [www.pslegal.org](http://www.pslegal.org), apply for help, enter “divorce” and zip code 61201. When you get to the point in the application where you are asked to enter personal information, please use “test” for the name and address and 000-000-0000 as the phone number. Test applications will be purged from our system.

By doing the test application, you will see what system users see.

Below are the triage rules we wrote for divorce in part of our service area. This is the work that went on behind the scenes and shows the branch logic used allow some applications through to us and to divert others elsewhere.

Triage for all divorce applicants:

- Ask yes/no question-

- Do you want to get divorced because you or your child are being abused or threatened with abuse by your spouse?

- Yes [allow intake for all counties except DuPage][show county-specific emergency info*][applicant to call PSLS]
  - Ask – what is your spouse’s name __[space for first, middle and last names]__

- No [move to non-abuse divorce rules – specific rules for office county]

- NON –ABUSE DIVORCE RULES – based on county/zip code

- [WAIT LIST MESSAGE – Due to high demand for divorce help, Prairie State Legal Services maintains a wait list for divorces and refers these cases to volunteer attorneys when appropriate. If your case is appropriate for referral to a volunteer attorney, Prairie State will let you know the approximately length of the wait list when we call you to complete your application for services.]
Triage for Rock Island service areas divorce without abuse:

- **ROCK ISLAND**
  - Ask, Have you and your spouse lived separately for 6 months or more?
    - If yes, ask
      - Will your spouse contest the divorce?
        - If yes, [end intake][refer to ILAO divorce content][hide program info]
          - GET MESSAGE – Prairie State Legal Services does not accept contested divorce cases. For more information on divorce, please see Illinois Legal Aid Online [link to ILAO divorce content][hide program info]
        - If no [proceed to next question on children]
      - Do you and your spouse have children together who are under 18?
        - If yes, ask – do you and your spouse agree on which parent should have custody of the child(ren)?
          - If yes, [proceed to next question on homeownership]
          - If no, [end intake][refer to ILAO divorce content][hide program info]
            - GET MESSAGE – Prairie State Legal Services does not accept divorces where custody is contested. For more information on divorce, please see Illinois Legal Aid Online [link to ILAO divorce content][hide program info]
        - If no [proceed to next question]
      - Do you and your spouse own a home together?
        - If yes, ask – do you and your spouse agree on which one of you should keep the house?
          - If yes, [proceed to next question on assets and debts]
          - If no, [end intake][refer to ILAO divorce content][hide program info]
            - GET MESSAGE – Prairie State Legal Services does not accept divorces where ownership of the marital home is contested. For more information about divorce, please see Illinois Legal Aid Online [link to ILAO divorce content][hide program info]
        - If no [parties do not own a house together] [proceed to next question]
      - Do you and your spouse agree on how your money, property, and debts should be divided?
        - If yes, [allow intake][show WAIT LIST MESSAGE][PSLS- PAI to call applicant]
        - If no [end intake][refer to ILAO divorce content][hide program info]
          - GET MESSAGE – Prairie State Legal Services does not accept divorces where division of money, property and/or debts are contested. For more information on divorce, please see Illinois Legal Aid Online [link to ILAO divorce content][hide program info]
        - If no,[parties have not been separated for at least 6 months][ end intake][refer to ILAO divorce content][hide program info]
          - GET MESSAGE – Prairie State Legal Services considers divorce cases after the parties have lived separate and apart for 6 months. You may apply again online after you have been separated for 6 months.
Brief Description: Organizations often put as much time into a pro bono case as does the volunteer. This session will explore Prairie State Legal Services’ partnership with Illinois Legal Aid Online to leverage technology - including online intake, an online volunteer opportunity portal, and eLearning courses – to maximize its pro bono program.

Program Goals (what you will learn):
1. Participants will be able to identify at least three ways in which technology can increase access to justice and service for pro bono clients.

2. Participants will become familiar with online systems for advertising various types of pro bono opportunities to potential volunteers and consider how these models could work in their own communities.

3. Participants will become familiar with eLearning and ways in which it can be used to recruit and train pro bono attorneys.

Topical Outline:
I. Online access project
   a. Brief description of project
      i. TIG grant from LSC
         1. 3 LSC partners (LOLLAF, LAF and PSLS) and ILAO
      ii. Works off of LSC problem codes
      iii. User access through statewide ILAO site or program website
      iv. Project development tasks
         1. Decide which problem codes to open
         2. Write triage rules
            A. Some to divert away from program intentionally
            B. Most to allow application in certain situations
            C. Diverted applicants are shown other resources
         3. System manager (ILAO) adds rules to system and edits
         4. On site manager controls settings
            A. # per problem code per office
            B. Open and close
            C. User to call program or program call user
      v. PSLS project history – brief description
   b. Describe user experience
   c. Demo system
   d. Demo access to data
e. Lessons learned
   i. Concept of triage works as expected
   ii. System useful divert and allow applications through
   iii. Good system to centralize intake
      1. Not a good systems to share decentralize intake – but that is due to how LS works
   iv. Need to staff intake line
   v. Need to open more broadly in order to get enough cases for volunteers
      1. Problem of what to do with application that do not meet PAI or office priorities
   vi. Complex system requires technological skill
      1. PSLS dependent on ILAO for mechanics, incl put up and edit rules
   vii. Applicants do not follow up

II. IllinoisProBono.org
   a. Brief explanation of ILAO and its purpose
   b. Overview of IllinoisProBono.org
   c. Explanation of Volunteer Portal and demo
   d. Other available IllinoisProBono.org resources
      i. Attorney Desk Reference Manuals
      ii. Hot Docs
      iii. MCLE on demand
   e. Special Project Home Pages

III. Prairie State’s Borderless Pro Bono Project
   a. Project overview
      i. Funded by LSC Pro Bono Innovations Fund grant
      ii. Volunteer attorneys provide telephone advice and brief services to unmarried parents with paternity, allocation, and child support issues
   b. Project webpage
      i. One stop shop for volunteer sign up, training materials, instructions
      ii. Benefits: continuous onboarding, recruitment tool
      iii. Downsides: It has to be updated
   c. eLearning course
      i. On demand; self-paced
      ii. CLE credit available
      iii. Development and maintenance is time consuming
      iv. Alternatives: static written materials; recorded webinars
   d. Incorporating remote volunteers
      i. Email referrals
      ii. Limited Legal Server access
      iii. Email case notes to Legal Server

IV. Group Discussion about Use of Technology
Notes:

Bibliography & Website Links:
1. www.illinoisprobono.org
3. eLearning course sign up (please feel free to sign up if you are interested in seeing how the course works!): https://docs.google.com/forms/d/1Ac9hu3-XdGOSbZ8RzHm4e7E8lqpl2Hgnc6RxGNHK5U/viewform?c=0&w=1
The Next Frontier: Using Technology to Maximize Pro Bono

Equal Justice Conference
May 13, 2016

Presenters

• Melissa Fuechtmann, Supervising Attorney
  Prairie State Legal Services
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• Stephanie Villinski, Content Director
  Illinois Legal Aid Online
  svillinski@illinoislegalaid.org

• Marisa Wiesman, Director of Volunteer Services
  Prairie State Legal Services
  mwiesman@pslegal.org
About Prairie State

- LSC funded
- Mix of urban/suburban and rural areas
- Staff of approx. 150
- Approx. 450 pro bono attorneys each year

About Illinois Legal Aid Online

- [IllinoisLegalAid.org](http://IllinoisLegalAid.org): Legal information & self-help for IL residents
- [IllinoisLegalAdvocate.org](http://IllinoisLegalAdvocate.org): Training & practice support for legal-aid advocates
- [IllinoisProBono.org](http://IllinoisProBono.org): Volunteer opportunities & training for pro bono legal professionals
Agenda

- Online access system
- IllinoisProBono.org
- Prairie State’s Borderless Pro Bono Project
- Your experiences with technology

Online Access System (OAS)

Melissa Fuechtmann
Prairie State Legal Services
mfuechtmann@pslegal.org
OAS Project Description

- Goal to direct applicants to the most appropriate legal resource
  - Triage applications consistent with program priorities
  - Redirect ineligible applicants to other resources efficiently
- TIG grant from LSC
- Project partners
  - Land of Lincoln Legal Aid, lead grantee
  - LAF
  - Prairie State Legal Services
  - ILAO
- Replication grant modeled after Northwest Justice Project in Seattle
- Works off of LSC problem codes

Project Development Tasks

- Decide which problem codes to open
- Write triage rules
  - Most to allow applications in certain circumstances
  - Some to divert applicants to more appropriate resources
    - Diverted applicants are shown referrals
- Decide on intake rules
  - Largely based on LSC regulations
    - Some variation based on specific grants
- System manager – ILAO – builds systems, including adding rules
- On site project manager controls system settings for each program
System Settings Controlled by Program

- Turn intake on and off for a given problem code
- Set number of applications we allow per problem code
  - For PSLS, which has 11 regional offices, we can set a number allowed per problem code per office
- Set time frame for system to reset
  - Daily, weekly, monthly
- User to call program to follow up, or program calls user
  - LSC requires follow up by phone

PSLS Project History

- PSLS needed an alterative to telephone intake
  - Phone system prioritizes calls based on issue and age of applicant
    - 95% of very urgent/high priority calls
      - DV, foreclosure, evictions, utilities
    - About 20% of important but less urgent matters get through by phone
      - Volunteers are available for some of these cases...but potential clients have to be able to reach us!
- PSLS also realized the value of allowing another point of access for applicants with urgent, high priority issue
PSLS Project History, continued

• Pilot launch in November, 2013
  • Public benefits and health care
  • Foreclosure
• Broader launch in Spring, 2014 – targeted to volunteer cases
  • Adoption
  • Guardianships, adult and minor
  • Bankruptcy
  • Powers of Attorney
• Family law added in early 2015 – targeted to volunteer cases

Now open...and coming soon

NOW OPEN...
Public benefits
Bankruptcy
Public utilities
Tax
Divorce
DV
Custody & visitation
Paternity

Adoption
Guardianship
Private Housing
Public and Subsidized Housing
Foreclosure
Powers of attorney

COMING SOON
Education
Expungement
Consumer
  • Some allowed already under bankruptcy
User Experience

- Start online application
  - Through ILAO – offer to apply pops up on content pages where program has rules
  - Through PSLS website
- Go through triage
  - Rules provided by program
- Go through intake
  - Limitations based on LSC

User Experience, continued

- Speak by phone with program staff
  - LSC requires follow up by phone
    - Need to verify information
  - User is told to request a time for call back or to call the program
    - System offers choices of times set by program OR
    - System shows phone number for applications to call
      - PSLS set up a dedicated number for this
  - System emails applicants with reminder to call
    - Incl hours and phone number
- Program proceeds with application per its own internal procedures
OAS Access points

Through ILAO

Through PSLS Website

System Demonstration – Rules

• From DIVORCE content
  • Ask yes/no question-
  • Do you want to get divorced because you or your child are being abused or threatened with abuse by your spouse?
  • Yes [allow intake for all counties except DuPage][show county-specific emergency info*][applicant to call PSLS]
  • Ask – what is your spouse’s name __[space for first, middle and last names]__
  • No [move to non-abuse divorce rules – specific rules for office county]
  • NON –ABUSE DIVORCE RULES – based on county/zip code
  • [WAIT LIST MESSAGE – Due to high demand for divorce help, Prairie State Legal Services maintains a wait list for divorces and refers these cases to volunteer attorneys when appropriate. If your case is appropriate for referral to a volunteer attorney, Prairie State will let you know the approximately length of the wait list when we call you to complete your application for services.]
System Demonstration – Rules, cont.

- ROCK ISLAND
- Ask, Have you and your spouse lived separately for 6 months or more?
  - If yes, ask
    - Will your spouse contest the divorce?
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      - Do you and your spouse have children together who are under 18?
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        - GET MESSAGE – Prairie State Legal Services considers divorce cases after the parties have lived separate and apart for 6 months. You may apply again online after you have been separated for 6 months.

Online application begins...
Online application for divorce – triage

Some applicants are re-directed

Applicant did not meet triage criteria

Applicant over income
Applicant to intake......and transferred to PSLS

PSLS receives electronic transfer
PSLS can begin intake or reject from here

E-transfer has enough info for a conflict check but hides most personal info

If rejected here, no application info appears in our case management system

System Demonstration – Data

Triage report shows numbers received – March 2016

Intakes report shows number transferred to PSLS – March 2016
System Demonstration – Data, cont.

PSLS tracks online apps by intake type

Reports

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System Demonstration, Data cont.
BPBP Custody Data

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Lessons Learned

- Concept of triage works well
- System useful to find cases we want and divert those not appropriate for PLS
- Good system to centralize intake
  - Not good for spreading out intake duties
- Need to staff online intake phone line to handle volume
- Need to open broadly to find cases for volunteers
  - Problem of what to do with cases not appropriate for volunteers
- Complex system requires technological skill
- Low follow through rate for applicants
IllinoisProBono.org
Stephanie Villinski
Illinois Legal Aid Online
svillinski@illinoislegalaid.org

Why is ILAO needed?

- Fewer than 500 legal-aid attorneys in Illinois.

- **Only 16%** of low-income households receive assistance for legal problems they encounter.

- **65%** of low-income households attempt to resolve their legal problems **without a lawyer** (about 875,000 legal matters).

- Our **#1 imperative** is to use technology to increase access to the law for lower-income Illinois residents.
IllinoisProBono.org: training and practice support for volunteer attorneys

- **Volunteer Opportunity** listings
- **HotDocs** automated legal documents
- **MCLE** on demand
- **Legal resources** in 30+ practice areas (videos, articles, forms)

Volunteer Opportunity Portal
Pro Bono Support Resources

More opportunities at this organization

Helpful legal guides

Webcasts of past trainings

Pro Bono Made Easy

One Click Contact

The following will be sent to the contact of the organization. You may edit it before the message is sent.

I found this volunteer opportunity on www.illinoisprobono.org and am interested in it. Please contact me about this opportunity. My name is Kevin Zlochman and I can be reached at kricketzaman@illinoislegalaid.org.
Support for >30 Areas of Law

Attorney Desk Reference Manual

**Appeals**

If the Department of Healthcare and Family Services (HFS, formerly “Public Aid”) denies the application, the person has a right to appeal the denial and receive a hearing. DPR Policy Manual 01-07-00. The appeal must be filed within 60 days of the date of denial, and is filed at the local DHS office or with the Bureau of Assistance Hearings (BAH), HFS, 401 South Clinton Street, Chicago, IL 60607. A person may also appeal by telephone to the Department’s toll-free number at 1-800-355-0774 or by calling (312) 793-2618. If you call to file your appeal, then request a registration confirmation number as proof of the appeal. Persons who appeal may be represented by an advocate. If the Department of Healthcare and Family Services (HFS, formerly “Public Aid”) denies the application, the person has a right to appeal the denial and receive a hearing. DPR Policy Manual 01-07-00. The appeal must be filed within 60 days of the date of denial, and is filed at the local DHS office or with the Bureau of Assistance Hearings (BAH), HFS, 401 South Clinton Street, Chicago, IL 60607. A person may also appeal by telephone to the Department’s toll-free number at 1-800-355-0774 or by calling (312) 793-2618. If you call to file your appeal, then request a registration confirmation number as proof of the appeal. Persons who appeal may be represented by an advocate.

**Continuation of Benefits**

If the applicant appeals HFS’s decision to terminate or reduce benefits on or before the date the decision becomes effective (“date of change”), or within 10 days of the date of notice (whichever is later), HFS must continue benefits through the date of decision on the administrative appeal. DPR Policy Manual 01-07-02. If the applicant appeals HFS’s decision to terminate or reduce benefits on or before the date the decision becomes effective (“date of change”), or within 10 days of the date of notice (whichever is later), HFS must continue benefits through the date of decision on the administrative appeal. DPR Policy Manual 01-07-02.

**Pre-Appeal Conference**

Department of Healthcare and Family Services (HFS) must schedule a pre-appeal conference with the applicant, the caseworker and the caseworker’s supervisor to try to resolve the appeal within 7 days of the date of appeal. DPR Policy Manual 01-07-02. As a practical matter, the conference is often scheduled well after the 7-day deadline.
Online interviews

MCLE on Demand
Borderless Pro Bono Project

Marisa Wiesman
Prairie State Legal Services
mwiesman@pslegal.org

Borderless Pro Bono Project

• LSC Pro Bono Innovations Fund project

• Volunteer attorneys give advice and brief services over the phone to unmarried parents with paternity, custody, visitation, and child support issues

• Volunteers and clients are matched regardless of geography
Use of technology

• Service by telephone
• Project website
• E-Learning
• Electronic sign up and reporting

Telephone advice

• Volunteers return calls from their home or office, on their schedule
• Only one volunteer interested in using Skype
• Successful in attracting volunteers from more populated areas to serve rural clients
Project website

http://borderlessprobono.illinoisprobono.org/

One stop shop

• Initial volunteer sign up
• Volunteer instructions
• Substantive training
• County specific resources
• Court forms
**Written Training Manuals and Helpful Guides**

**NOTE:** Major revisions to the Illinois Marriage and Dissolution of Marriage Act (IMDMA) and the Parentage Act went into effect on January 1, 2016. The resources listed below address the laws in effect both before and after January 1, 2016, as indicated.

Substantive training and reference materials for project volunteers include the following: a training manual, power point presentations, and several brief articles. We recommend that volunteers new to family law also take the BPBP e-Learning course.

Registration for the course is available here.

**Resources addressing family laws in effect as of January 1, 2016**

- BPBP Volunteer Attorney Guide: Common Questions
- Power Points: Family Law Basics for Unmarried Parents
- Changing OMA Support Payments
- Establishing Legal Parentage (Paternity)
- Getting Allocation of Parental Responsibilities (Custody)
- Getting Parenting Time (Visitation)

**Resources addressing family laws in effect through December 31, 2015**

(NOTE: These out of date resources are for information purposes only and should not be relied upon for current law.)

**Related Articles**

- Information for Prospective Volunteers
  
  Updated: 06/15/2015
- Video Training
  
  Updated: 06/05/2015
- Family Law Meetings and Court Forms
  
  Updated: 05/06/2015
- Instructions and Project-Specific Resources for Volunteers
  
  Updated: 05/13/2015
- BPBP Volunteer Attorney Guide: Common Questions
  
  Updated: 01/04/2016
- Legal Info for the Public
  
  Law at the Library: How to Find a Lawyer If You Can’t Afford One
  
  Updated: 12/21/2011
- News
  
  Marching Toward Our Transformation!
Volunteer sign up: It’s just a Google form

PSLS Borderless Pro Bono Volunteer Registration Form
Thank you for your interest in Prairie State Legal Services’ Borderless Pro Bono Family Law Program. Please fill out this form to get started.

* Required
First Name *
Last Name *
E-mail *
Phone Number *
Address *

eLearning course
Benefits of a dedicated project website

• One stop shop
• Recruitment tool
• Provides assurance to new volunteers about available resources
• Allows for continuous onboarding of new volunteers
• Organizational tool for the legal aid provider

Downsides to a dedicated project website

• You have to keep it up to date
Incorporating remote volunteers

- Email referrals
- Limited Legal Server access
- Email case notes to Legal Server