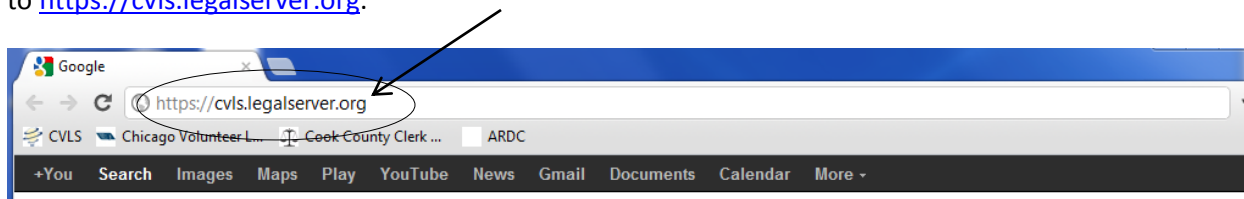
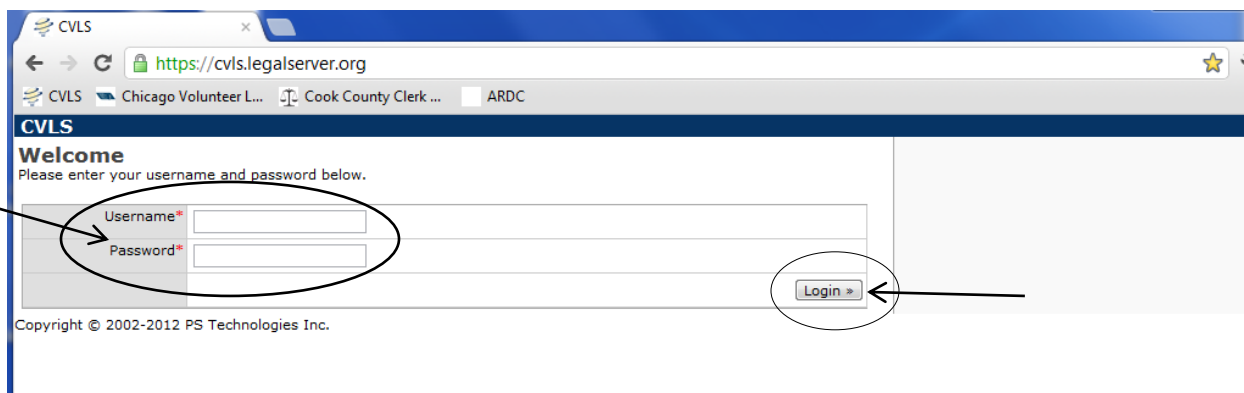


## CVLS Legal Server Tutorial

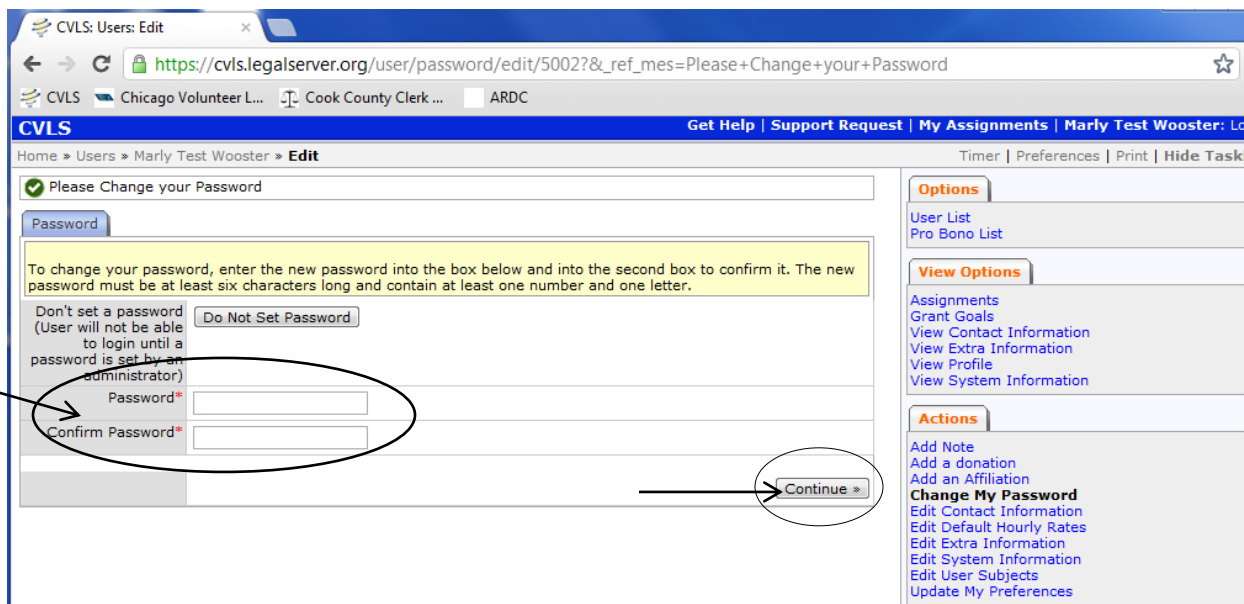
To login to CVLS's case management system Legal Server (LS) open your internet browser and navigate to <https://cvls.legalserver.org>.



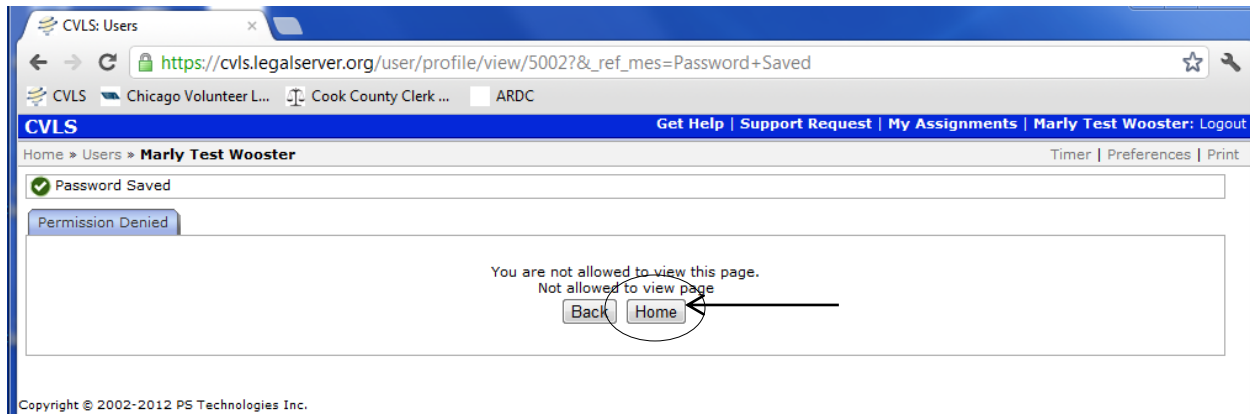
Enter your username and password. Then click Login.



You will be prompted to change your password. Enter and Confirm Password and then click Continue.



Click on Home to go to your home page. (Don't worry about the Permission Denied tab).



On your home page you will see a variety of important items and options. We'll walk through 3 of them in this tutorial.

Let's start with A. Preferences. Click Preferences.

**Current Assignments**

Matter/Case Name	Case ID#	Start Date	End Date	Legal Problem Code	Special Legal Problem Code	Case / Matter Disposition	Case Status	Assignment Type	Action
test, test	11-0125408	05/07/2012	N/A	82 Mental Health	826 Adult GAL	Open	Placed with Volunteer	Pro Bono	Edit

**Pro Bono Opportunities**

This displays a list of available Pro bono cases for volunteers to review. Depending on your level of access you will either be able to show "Interest", assign the case to yourself, or do both. Please click the appropriate link below to learn more about these cases.

Viewing all 6 results.

Matter/Case ID#	Legal Problem Code	Pro Bono Opportunity Description Note	Is Interested	Action	Case Opportunity Available Date
12-0128298	82 Mental Health	GAL assignment for initial guardianship petition.	N/A	<a href="#">Learn More About This Case</a>	05/07/2012
12-0128216	82 Mental Health	EXPERIENCED GAL NEEDED. For 3 cross-petitions.	N/A	<a href="#">Learn More About This Case</a>	04/30/2012

Click Edit Contact Information on the right hand side of the screen.

The screenshot shows the user profile page for Marly Test Wooster. On the left, there are sections for 'Intake' and 'Interface'. The 'Intake' section includes 'Preferred Intake Type' (N/A), 'Use Intake Timer' (Yes/No), and 'Interface' settings (Color Theme: Blue, Font Family: Verdana (Default)). The 'Interface' section includes 'Interface: Font Size'. On the right, there is an 'Actions' menu with the following options: Add Note, Add a donation, Add an Affiliation, Change My Password, **Edit Contact Information** (circled with an arrow), Edit Default Hourly Rates, Edit Extra Information, Edit System Information, Edit User Subjects, and Update My Preferences.

Then update your contact information.

The screenshot shows the 'Edit' page for Marly Test Wooster. The page is divided into several sections: 'Contact Information' (Name: Marly Test Wooster, Preferred Donation Name, Salutation), 'Home Address' (Street Address, City, State, Zip), 'Work Address' (Bind Work Address to Organization: Yes, Attention/Care Of, Work Street Address: 100 N. LaSalle St., Suite 900, Chicago IL 60602, Cook), 'Preferred Address' (Home), 'Is it okay to send mail?' (Yes/No), 'Home Phone', 'Work Phone' (312-332-7574), 'Mobile Phone', 'Fax', 'Other Phone', 'Email\*' (mwoostercvls@gmail.com), and 'Is it okay to send email?' (Yes/No). On the right, there is an 'Options' menu (User List, Pro Bono List), a 'View Options' menu (Assignments, Grant Goals, View Contact Information, View Extra Information, View Profile, View System Information), and an 'Actions' menu (Add Note, Add a donation, Add an Affiliation, Change My Password, **Edit Contact Information** (highlighted), Edit Default Hourly Rates, Edit Extra Information, Edit System Information, Edit User Subjects, Update My Preferences).

When you're done, click Continue at the bottom of the page.

The screenshot shows the bottom of the user profile page. There is a 'Continue' button with a right-pointing arrow, which is circled with an arrow pointing to it from the left.

Your newly entered Contact Information will appear on the screen. Check your info again, and then click Home at the very top of the page.

CVLS Get Help | Support Request | My Assignments | Marly Test Wooster: Logout

Home > Users > Marly Test Wooster > Edit Timer | Preferences | Print | Hide Taskbar

**Contact Information**

Name (First\*, MI, Last\*) Marly Test Wooster Suffix

Preferred Donation Name

Salutation

**Home Address**

Street Address

Street Address (additional)

City, State, Zip City IL Zip

**Work Address**

Bind Work Address to Organization\* Yes

Attention/Care Of

Work Street Address 100 N. LaSalle St.

Work Street Address (Additional) Suite 900

Work City, State, Zip Chicago IL 60602

Work County Cook

**Options**

User List  
Pro Bono List

**View Options**

Assignments  
Grant Goals  
View Contact Information  
View Extra Information  
View Profile  
View System Information

**Actions**

Add Note  
Add a donation  
Add an Affiliation  
Change My Password  
**Edit Contact Information**  
Edit Default Hourly Rates  
Edit Extra Information  
Edit System Information  
Edit User Subjects  
Update My Preferences

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 page.

CVLS Get Help | Support Request | My Assignments | Marly Test Wooster: Logout

Timer | Preferences | Print | Hide Taskbar

Tasks

Not allowed to view tab.

**Current Assignments**

Viewing Only Result Reset A to Z Show Filters

Name	Matter/Case ID#	Start Date	End Date	Legal Problem Code	Special Legal Problem Code	Case / Matter Disposition	Case Status	Assignment Type	Action
test, test	11-0125408	05/07/2012	N/A	82 Mental Health	826 Adult GAL	Open	Placed with Volunteer	Pro Bono	Edit

No Other Pages

**Message Center**

Unread Messages  
Dismissed Messages  
Send New Message

The screenshot shows the CVLS web application interface for a case titled "test test (11-0125408)". The interface is divided into several sections:

- Top Navigation:** Includes "Home", "Cases", and "test test (11-0125408)".
- Case Overview:** Displays "test test (11-0125408)" and "Other Cases for this Client (Compact)".
- Client Information:** Includes "Client Contact Information", "Applicant Phone #s", "Email", and "Address".
- Court Case:** Displays "Court Case [Edit]", "Docket Number", "Judge", and "Legal Problem Code".
- Notes:** Contains "New Assignment: Case - test test (11-0125408) (Case Notes)" and "Intake Notes".
- Documents:** Shows a list of documents, including "test, test (11-0125408)" and "Generated Documents".
- Right Sidebar:** Contains "View Information", "Actions", "Scheduling", "Print...", "Intake", and "Eligibility" sections.

1. The ^ tab will always return you to the basic case info.
2. These tabs will provide additional information.
3. Click here to see Adverse Parties information.
4. Here you'll see specifics about the court case.
5. Here you'll see any case notes that have been added.
6. Click here to add Case Notes of your own.
7. This is the Documents section. You can upload documents here. Click and drag a document or PDF and release the mouse over 7a. the folder which will be highlighted and then the document will be attached to the LS record.
- 7b. This is where you will find documents that LS can generate. CVLS uses this for form letters sent to multiple clients. Depending on the case type, you might use a document in this folder.

It is possible to e-mail a LS record. You might want to forward an e-mail you receive from a client, or attach an e-mail you send. You can do that with any legal server record simply by addressing the e-mail to [the legal server case number] @cvls.legalserver.org.

To attach an e-mail to the legal server record for this test case, I addressed the e-mail to 11-0125408@cvls.legalserver.org. That number can be found at the top of the basic case info page.

LS Case #

^ Clinics | Contacts | Family Members | Financial | Foreclosure Mediation | Referrals

Events | Tasks | Case Time | Activity Log | Billing Transactions

**test test (11-0125408)**

**Other Cases for this Client (Compact) [Edit]**

Other Cases for this Client: This Client has no Other Case Records [Expand](#)

**Master/Subordinate Cases (Compact) [Edit]**

Master/ Subordinate Case Status: No Associated Cases [Expand](#)

Client	Demographics	Adverse Parties
Name	test test <a href="#">[Edit]</a>	
<b>Client Contact Information</b>		
<b>Applicant Phone #s [Edit]</b>		
Home Phone	home phone	
Preferred Phone	Home Phone	
Email		
<b>Address [Edit]</b>		
Address	Chicago, IL	
County of Residence	N/A	
County of Dispute	N/A	

Case Info	Pro Bono Opportunity Status
<b>Access to Justice</b>	
Offsite Box Number	N/A
Next Court Date	N/A
<b>Court Case [Edit]</b>	
Docket Number	TEST
Judge	Please Select
Legal Problem Code	N/A
Special Legal Problem Code	N/A
Client Conflict Status	N/A
Adverse Party Conflict Status	No Conflict

Case Notes	Assignments	Pro Bono Referral Attempts										
<p><b>Notes</b></p> <p style="text-align: center;"><a href="#">Show Filters</a></p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p><b>Email: Subject when I e-mailed the LS Record (General Notes)</b></p> <p><small>Posted on 05/08/2012 by System User - Delete/Transfer</small></p> <p>From: Marly Wooster &lt;MWooster@cvls.org&gt;</p> <p>This is a test to show how an e-mail will appear in the LS record of a case.</p> <p>Marly Wooster            Administrative Assitant            P[(312) 332-7574 F[(312) 332-1460            [Description: chicago volunteer legal services]&lt;http://www.cvls.org/&gt;</p> <p>Documents Attached:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Title</th> <th>Size</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td> image001.jpg</td> <td>image001.jpg</td> <td>48.5 kiB</td> <td><a href="#">Download</a></td> </tr> </tbody> </table> </div>			Name	Title	Size	Actions	image001.jpg	image001.jpg	48.5 kiB	<a href="#">Download</a>		
Name	Title	Size	Actions									
image001.jpg	image001.jpg	48.5 kiB	<a href="#">Download</a>									

**Note Drafts**

N/A  
2012-05-03 16:05:58  
[Delete All Drafts](#)

test test

**Case No: 11-0125408**

LPC	N/A
Date Opened	05/07/2012 <a href="#">[Edit]</a>
Assignment Office	CVLS
Assignment Program	Adult GAL
Primary Assignment	Marly S Wooster
Funding Code	600 Panel <a href="#">[Edit]</a>
Case Status	Placed with Volunteer <a href="#">[Edit/View History]</a>
Pro Bono Opportunity Status	No: No Longer Available
Case Opportunity Available Date	05/07/2012
Case Placement Date	N/A
Disposition	Open
Client Conflict Status	Undetermined

**View Information**

- [Assignment History](#)
- [Case Alerts](#)
- [Case Contacts](#)
- [Case Profile](#)
- [Documents](#)
- [Litigation](#)
- [Litigation Overview](#)
- [Outside Org Referral History](#)
- [Private Bar Referral History](#)
- [Trust/Expense History](#)

**Actions**

[Add Activity](#)  
[Add An Additional Name](#)

The e-mail will appear like the one in the box above. The image attached is my e-mail signature.

### 3. Pro Bono Opportunities.

This is where you can “shop” for cases.

3

Pro Bono Opportunities Previous Opportunities

This displays a list of available Pro bono cases for volunteers to review. Depending on your level of access you will either be able to show "Interest", assign the case to yourself, or do both. Please click the appropriate link below to learn more about these cases.

Viewing all 7 results. [Reset](#) [Show Filters](#) 

Matter/Case ID#	Legal Problem Code	Pro Bono Opportunity Description Note	Is Interested	Action	Case Opportunity Available Date
12-0128298	82 Mental Health	GAL assignment for initial guardianship petition.	N/A	<a href="#">Learn More About This Case</a>	05/07/2012
12-0128216	82 Mental Health	EXPERIENCED GAL NEEDED. For 3 cross-petitions.	N/A	<a href="#">Learn More About This Case</a>	04/30/2012
12-0127467	82 Mental Health	successor guardianship	N/A	<a href="#">Learn More About This Case</a>	03/30/2012
12-0128210	82 Mental Health	GAL appointment on initial petition for disabled adult guardianship	N/A	<a href="#">Learn More About This Case</a>	05/01/2012
11-0125208	82 Mental Health	Mother seeks to obtain adult guardianship for disabled daughter. Father deceased.	N/A	<a href="#">Learn More About This Case</a>	04/24/2012
12-0128266	82 Mental Health	GAL assignment for initial guardianship petition.	N/A	<a href="#">Learn More About This Case</a>	05/02/2012
11-0125408	82 Mental Health	Case basics like: GAL assignment for initial guardianship petition.	N/A	<a href="#">Learn More About This Case</a>	05/07/2012

No Other Pages

Click on Learn More About This Case to see basic contact information for Client and Adverse Parties.

Real names and addresses will be present this is just a test case.

Client Information	
Case	<a href="#">test test (11-0125408)</a>
Date of Birth	01/05/1988
Full Address	Chicago, IL
Full Mailing Address	N/A
Permanent Address	N/A
<p>Checking this box confirms that a conflict check was performed and there is not a conflict with this client so additional case information can be displayed.</p>	
Confirmation	<input type="checkbox"/>
<input type="button" value="Cancel and Return To Homepage"/>	

Once you have performed a conflict check. Click Confirmation. And more information will be revealed.

Client Information	
Case	test test (11-0125408)
Date of Birth	01/05/1988
Full Address	Chicago, IL
Full Mailing Address	N/A
Permanent Address	N/A
<p>Checking this box confirms that a conflict check was performed and there is not a conflict with this client so additional case information can be displayed.</p>	
Confirmation	<input checked="" type="checkbox"/>
Additional Information	
Pro Bono Opening Memo	Contains more specifics like: Docket number, court date and case details.
<input type="button" value="Cancel and Return To Homepage"/>	
Interested/Assign Case	N/A <input type="button" value="v"/>

If you're interested in the case, click on the drop down menu and select Interested.

<input type="button" value="Cancel and Return To Homepage"/>	
Interested/Assign Case	Interested <input type="button" value="v"/>
Note to Email	<div style="border: 1px solid gray; height: 80px;"></div>
<input type="button" value="Continue »"/>	

Enter any notes or comments you want to e-mail to the attorney in charge of placing the case and click continue. You're interest will be e-mailed and the attorney or staff member in charge of placing the case will be in touch with you soon.