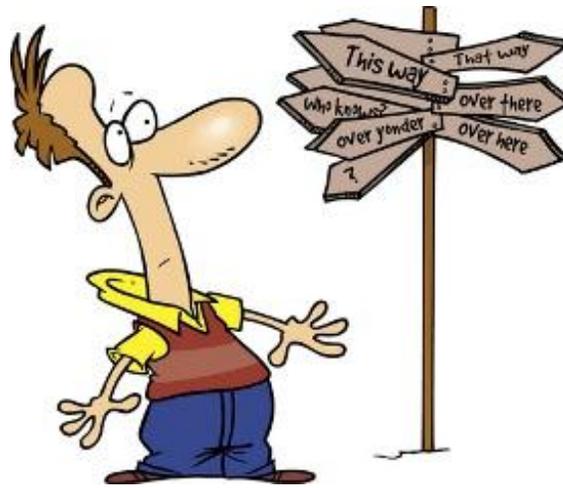


**HANDY DANDY
CLINICIAN**

**QUICK REFERENCE
GUIDE**



LSLAP

WHO LSLAP CAN HELP

The areas of law undertaken by LSLAP students include:

- Criminal
- Small Claims - Notice of Claims / Replies
- Employment Standards
- Workers Compensation Board
- Consumer Protection
- Employment Insurance
- Social Assistance / Appeals
- Wills and Estates
- Immigration/Refugee
- CPP and Disability
- Social Security Tribunal Appeals
- Civil Liberties
- Complaints against Police
- Residential Tenancy Branch Arbitrations
- Academic Disciplinary Hearings
- Demand Letters
- Wills
- Power of Attorneys
- Representation Agreements / Living Wills
- Incorporation of Non-Profit Societies

Areas we **cannot** assist in include:

- Family Law (divorce, custody)
- Driving Offences (including impaired driving)
- Complaints against Lawyers or Doctors
- Personal Injury (Tort)
- Probating or Estate Matters
- ICBC matters
- Unionized Employment issues
- ANYTHING IN Supreme Court (eg Strata Issues, Privacy, defamation)
- Complaints against UBC
- Property Issues

OR anything the supervising lawyer determines is outside our mandate or capabilities.

Income Criteria:

LSLAP policy excludes, for financial reasons, those who have a personal annual income over \$30,000, or those who have a combined family income of more than \$35,000 for 2 people or \$45,000 for a household income of 3 or more. However, these are only guidelines. We do not disclose these policies because we do not want people to bend the truth in order to meet our guidelines. If you have any doubt about a client's qualifications for assistance, tell them that you have to speak to a Program Lawyer in order to make a determination.

CONTACT INFO

| Clinic Heads | E-Mail | Clinic |
|--------------|--------|---------------------------|
| | | Britannia Week 1 |
| | | Burnaby C. C. Week 2 |
| | | Carnegie Drop-In (Week 1) |
| | | Carnegie Drop-In (Week 2) |
| | | Chinatown Week 2 |
| | | Gordon House Week 2 |
| | | Kitsilano (Week 2) |
| | | Marpole Week 1 |
| | | Mount Pleasant (Week 1) |
| | | Mount Pleasant (Week 2) |
| | | New West Seniors Week 2 |
| | | North Shore Week 2 |
| | | Positive Living Week 2 |
| | | Ref/Imm (GOR) Week 1 |
| | | Ref/Imm (SUR) Week 2 |
| | | Thunderbird (Week 1) |
| | | Richmond Week 1 |
| | | South Vancouver Week 1 |
| | | Surrey Gateway Week 1 |
| | | Surrey PICS Week 2 |
| | | UBC Week 2 |
| | | Robson Square Drop-In |

| Position | Name | E-Mail | Phone |
|---------------------------|------|--------|-------|
| Program Lawyer (Criminal) | | | |
| Program Lawyer (Civil) | | | |
| Program Administrator | | | |
| Executive Director | | | |
| Operations Director | | | |
| Public Relations | | | |
| Finance Director | | | |
| Publications Director | | | |
| Director at Large | | | |

CLINIC SCHEDULES

Please see lslap.bc.ca/clinics.html for current clinic schedules.

Your clinic head will let you know about any clinic-specific information, and to help co-ordinate carpooling, etc. If you have any concerns about your clinic or your files, please talk to your clinic head first. If you need more help, please talk to your Director-at-Large, Josh (see above for contact info)

SUPERVISING LAWYER BOOKING

Please see <https://docs.google.com/spreadsheets/ccc?key=0As8QMOEV1duFdGxxODdXdThJZnJEb0NhZ0hDMHgXSmc&usp=sharing> for the supervising lawyer booking page — you will have an invite link to it to edit.

To prepare to see the lawyer, read over the appropriate manual chapter at lslap.bc.ca/lslap-manual-online.html to familiarize yourself with the area of law. Ask an experienced clinician for guidance.

MENTORSHIP

Please see docs.google.com/spreadsheets/d/1-855pcG5MAQeqYooX_uDh9t_z8ZoghvjkmSx8tB2VDk/edit?usp=sharing to find someone with some LSLAP experience who can help you out. This list will be updated throughout the year, and once you have some familiarity with something, let us know and we will add you to the list!

FILE SIGN OUT

<https://docs.google.com/spreadsheets/ccc?key=0As8QMOEV1duFdHNJWkY4TG9lajZWUzdSYnFmcGcxeWc&usp=sharing> you will be receiving an invite to this doc so that you can sign out files for court. OTHER RESOURCES

LSLAP templates and precedents: after logging in on the LSLAP website (password: fishroom) click on the appropriate area of law to find sample letters and resources. Look under “General” for generic scope of work, closing, lost contact etc. letters.

Websites: In addition to Quicklaw, Westlaw, CanLii and other **legal research sites** you will learn about in Legal Research and Writing, useful sites include:

www.bclaws.ca for current BC statutes and regulations.

online.cle.bc.ca for current practise manuals: login ID ubclaw and password 1822

www.thelawcentre.ca/other_resources for Small Claims fact sheets

The websites of various **administrative bodies**. Generally speaking, these sites have links to their statutes and regulations, instructions on applying for arbitration or appeals, and often decisions or fact sheets which can help you prepare submissions. This is not an exhaustive list:

www.rto.gov.bc.ca Residential Tenancy

www.bchrt.gov.bc.ca BC Human Rights Tribunal

www.chrt-tcdp.gc.ca/NS/index-eng.asp Canadian Human Rights Tribunal

www.eia.gov.bc.ca/bcea.htm Employment and Income Assistance (Welfare)

www.servicecanada.gc.ca/eng/sc/ei/index.shtml Service Canada's EI website

www.canada.ca/en/sst/ The Social Security Tribunal website

Other **community advocacy** organizations such as:

<http://www.tenants.bc.ca/main/> (TRAC, the Tenant Resources and Advisory Centre)

<http://www.nidus.ca> (Nidus, the Personal Planning Resource and Registry)

The student executive and the Program Lawyers have contact information for lawyers and other advocates practising in various fields who might be willing to assist students. Please come and see one of them if you need additional help with:

Employment Law

Worksafe BC appeals

Social Assistance

Residential Tenancy problems

Human Rights

QUICK HOW TO GUIDES:

The following 4 pages are quick how-to guides to opening, managing, transferring and closing files.

The purpose of the initial interview is to gather enough information within 30 minutes to determine if we can assist the client, while gaining an understanding of their situation, goals and instructions.

PRIOR TO INTERVIEW

- Make sure you have the appropriate materials including

| | |
|--|--------------------------|
| Client File Folder | Client Handout |
| Client Waiver | Client Statistics Sheet |
| Initial Interview sheet or electronic equivalent | Relevant Interview Guide |

- If you have time, read through the relevant Interview Guide and Manual Chapter.

DURING THE INTERVIEW

- Introduce the program, explain how the session will work, covering the waiver, the session’s purpose and time limit, and what they can expect today and going forward.
- Get the client to read and sign the waiver, making sure they understand it, introduce the file review section
- Complete the stat sheet with them
- Copy their ID if they did not bring a copy, return their original
- Ensure the Client Handout has your name and email contact info on it, and give it to the client.
- Using the Interview Guide as a starting point, cover **who, what, when, where, why**, taking detailed notes.
 - If you are online, create a file in Clio (a “Matter”) into which you can take your notes directly.
- End by reminding the client of your name, how to contact you, and set a timetable for action (i.e. I will get back to you within 2 weeks, OR you will get me x info by Friday)
- DO NOT give legal advice, explain that you must consult with the supervising lawyer first

IMMEDIATELY AFTER THE INTERVIEW

- Fill out the front of the file with in consultation with your clinic head.
- If your clinic has internet access, your clinic head can ensure that you have created the file correctly in Clio and that the client has been added to the contact list.
- Record the meeting on the file and in the Clio Time record as an Interview (1/2 hr).
- Mark down a limitation date if there is one. Add it to Clio online.
- Put a Pending date on the front of the file, usually this will be to see the Supervising Lawyer in a week or 10 days. Add the date to Clio under the Pending Date box if you have internet access.

FOLLOWUP WORK & RESEARCH PRIOR TO MEETING WITH THE SUPERVISING LAWYER

- Review the LSLAP Manual, LSLAP research guides / web resources, and other appropriate websites for information
- Talk to your Clinic Head, Clinic supervising lawyer, and other clinicians at the clinic for guidance

MAKE AN APPOINTMENT WITHIN TWO WEEKS LSLAP’S PRINCIPAL SUPERVISING LAWYER

- Be prepared to give a summary of the file, and discuss what steps you think are appropriate. Have your physical file and the “Matter” open in Clio on your computer
- Take detailed notes — this can be done directly into a “Note” within the “Matter” in Clio
- The supervising lawyer will assist you to
 1. Establish the Scope of Work which you will note on the front of the file
 2. mark the matter as either “Summary Advice” or “Ongoing Work” in Clio
 3. confirm any limitation date which you will mark on the file and in Clio
 4. establish a new Pending date task which you will update on the front of the file and in Clio
- Contact the client and start working on your file!

As an LSLAP clinician, it is as important to **document** and **manage** your file professionally as it is to provide accurate legal advice and effective representation. LSLAP has recently updated procedures to improve file security and confidentiality and to better track our work.

AT THE CLINIC

Client files will be taken from the clinic by the Clinic Head and returned to the LSLAP offices the following day.

DOING WORK AT THE OFFICE

The physical file must remain in Allard Hall at all times, either in the **LSLAP offices**, or in the **Law Library**.

DOING WORK AWAY FROM THE OFFICE

- You cannot remove the file from the office unless signed out for a **hearing** or **appearance**. Notes and documents should be uploaded to Clio for online access anywhere you have an internet connection.
- To sign a file out for an appearance or hearing, use the File Sign-Out Spreadsheet, then return the file and sign it back in the following day.

DOCUMENTING YOUR WORK

The purpose of documenting your work is to enable a different clinician to pick up your file if needed and have all the information they need to effectively handle the file. This is the standard that most firms demand from their lawyers. All file work must be **documented and stored with the file immediately**.

- any phone call or meeting with clients or other parties: document who was on the call, the date, what was discussed, and what next steps were arranged. This can be done from within the "Matter" in Clio. Clio's "Time Entry" feature includes a timer you can stop and start at the beginning and end of your phone call, research session, interview, etc.
- interviews with supervising lawyers: document what was discussed and next steps.
- research: note what was done, what was discovered, and where it was found
- Any work done, in or out of Allard Hall, should be documented in a Clio Time Record
 - E-mails, and Notes created within Clio, should be printed out for inclusion in the physical file
 - Physical documents should be uploaded to Clio - scan directly to your "Matter" or upload

PENDING TASKS

- There will **always** be a Pending task with a bring-forward date on the front of your file and in Clio: once the task is complete, set a new Pending date in Clio and write the task and the bring-forward date on the front of the file.
- If the date passes and you have not completed the task, you must update the date (on the file and in Clio)
- Clio contains Calendar and Tasks features you can use to help organize your time: you can add reminders.
- If you have a Trial or Hearing, you must inform the PR exec of the date of the trial and any required Pre-Trial Hearings or Conferences. Put them on the Calendar within Clio, too.

LIMITATION DATES

- Missing a limitation date is a very serious violation of your duty to your clients. You are ultimately responsible for ensuring that these are not missed.
- Some limitation dates are very short: appeals of certain decisions might only be 10 or 14 days. You must communicate clearly with your client and the Program Lawyers to ensure limitation dates are identified and adhered to!

TO TRANSFER

1. Let the PR exec know you would like to transfer a file: pr@lslap.bc.ca and get permission to do so
2. Prepare and update the file for transfer:
 - Contact the client and advise them of the transfer
 - Record all activities as if closing the file: update your time records, activity logs, make sure all your work is recorded, and printout all the relevant Clio reports to include with the file
 - Ensure all documents are printed out and organized chronologically within the physical file
 - Ensure emails, notes and other documents are uploaded to the Clio Matter
 - If it is a trial file, inform the trial supervising lawyer of the receiving student (name, contact info)
 - FOR A CRIM. FILE ensure the appearance list is up to date and confirm the next appearance date on CSO
3. Complete an LSLAP Transfer Memo: Write up a brief but comprehensive memo with special attention to limitation/next appearance dates.
 - make a copy: Put one copy in the file — Give the other copy to the switchboard operator.
4. Put the physical file in the PR Files for Transfer box (and notify PR by email that you have done so)
5. If the file is still in your name in Clio after 2 weeks, double check with PR to see that it has been transferred.

TO TAKE A TRANSFER FILE

1. Review the file with the PR exec or transferring student, paying special attention to any limitation dates or upcoming appearances. Be prepared to contact the client and/or start work on the file ASAP
 2. FOR A CRIM FILE:
 - check the client's name on CSO to confirm any appearances, note these on the Appearances Sheet.
 - Contact Leslie Anne immediately (by appointment, and email her) to let her know that you have the file.
 - Contact the client to advise you are the student on the file and give them your LSLAP contact info (name, switchboard phone number and LSLAP email address)
 - Contact Crown to advise that you are the student on the file and give them your contact info (personal cell phone number)
 - Follow up on any outstanding disclosure or other correspondence directly with the Crown on the file (ie address your fax by name to the Crown, and attach a copy to send by email: first.last@gov.bc.ca)
 3. FOR A CIVIL FILE
 - check any limitation dates
 - contact the client to advise them you are on the file and give them your LSLAP contact info (name, switchboard phone number and LSLAP email address)
 - continue with scope of work as established or meet with Sarah ASAP to establish and begin a scope of work.
-

All files OPENED must be CLOSED. 7 Tasks are needed to close a file:

1. DRAFT AND SEND A CLOSING LETTER

Each file must include a closing letter demonstrating that the client has been advised:

- That their file has been closed
- That we will not be giving them further legal advice or assistance
- Of the reason for closing their file
- That they may contact LSLAP to open a new file in the future for any further issues

You will find a template for a closing letter on the LSLAP website: draft it then **send it to the supervising lawyer for approval.**

2. ENSURE THAT THE FRONT OF THE FILE HAS BEEN FILLED OUT PROPERLY

Verify the client and student names and the file number are correct at the top and bottom of the file. Make sure the scope of work and pending/bring forward sections are filled out

3. COMPLETE THE TIME RECORD

This should be kept up on an ongoing basis both on the physical file and in Clio. Double check it for accuracy, and print out the Time/Activity reports from Clio. Ensure that all documents in the file have been uploaded to Clio, and that any notes or documents in Clio have been printed out for the physical file.

4. COMPLETE THE CLOSING FILE RECORD

- File Summary: brief summary of action taken and what was accomplished
- Student Action: 01 Summary Advice if you spent less than 2 hours on the file (including initial interview) otherwise 02
- Referred To: Refer to the back of the Statistics Sheet for the correct code
- Hearing Outcome: 01 if the Scope of Work did not entail your attendance at a hearing. 04 if there was a hearing but the client got new counsel, you lost contact with the client, or you withdrew from the record for any other reason.
- Activities/File Work: Print out the Time Report from Clio to include with the file

5. FILE CLOSING CHECKLIST

Initial the first four items once you've completed the above steps

6. GET EXECUTIVE TO SIGN-OFF

Once finished all the above steps, bring the file to an Executive member to approve. They will either take the file, or direct you to put it in a specific place, ie: certain box.