2C Virtual Pro Bono Clinics: How Simpson Thacher and VOLS Collaborate on a Dedicated Pro Bono Platform

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Peter Kempner:

Welcome everybody to Virtual Pro Bono Clinics: How Simpson Thacher and Volunteers of Legal Service Collaborate On A Dedicated Pro Bono Platform. My name is Peter Kempner. I am the legal director here at Volunteers of Legal Service also known as VOLS, and I am joined by Harlene Katzman, who is pro bono council at Simpson Thacher and by Beth Lambdin, who is practice innovation manager at Simpson Thacher. So, welcome everybody. We're going to start off today's presentation by having a short conversation about today's topic. But then what we're going to do is actually do a demonstration of the platform for everybody. And so I'm going to start off by asking, what is Access by Simpson Thacher? Harlene.

Harlene Katzman:

Thank you so much, Peter. And we are really happy to be here presenting to you all and really appreciate being invited to do this. We're very excited about this platform. I'll give you the short answer of what the platform is, but really the answers to that question will come when we do the demonstration and you get to see for yourself and feel for yourself what the platform really is. So Access by Simpson Thacher is the name of a platform. It's really a digital tool that enhances pro bono collaboration among clients, volunteers, and legal services organizations. And the point of the platform is that it creates a hub for training, for client management and for communication. So that's the short answer.

Peter Kempner:

Okay. Great. And so, Harlene, can you tell us why Simpson chose to build this platform and was this something that was born out of COVID?

Harlene Katzman:

It was born out of COVID but it's going to last far beyond COVID. And I'll tell it to you, I mean, it's a great story. Simpson Thacher has a long, long history of serving low income clients through legal clinics. We've been doing them for decades. We've advised small businesses on things like entity selection and contract review. We've helped immigrants complete naturalization applications and DACA applications. We've assisted veterans who are applying for service connected benefits, among many others. And all by meeting with them in teams for a few hours where we work on the application. We face the clients; we look at the documents. We do it in teams, we put everything together and complete an application for our client.

We've also invited in our billable clients. So financial institutions and other companies that Simpson Thacher does business with that have in-house legal teams. We partner with those in-house legal teams pretty frequently to serve the low income communities and they have really enjoyed that as well. And the way it used to work is we would invite everybody into our offices and we'd have big conference rooms and we would sit, the teams would sit around a table with a laptop and they would do everything together. And a copy machine and a paralegal and we would feed everybody lunch. And it worked like that for years and years and years, and was incredibly successful. We've literally served, I don't know, thousands of clients this way.

So no surprise when COVID hit, we no longer had a place where we could easily collaborate either with our billable clients or with the attorneys or with the legal services organizations. But the clients still had these same legal needs. So we had to be able to adapt to continue the services. And we did adapt because obviously everyone used Zoom and we have email and we have technology, but it was really clunky and really inefficient. We would do this work by sending emails back and forth to each other and trying to send documents that were getting rejected because the file size was too big and trying to keep track of drafts when one person is doing it and then another and we're not sitting on the same server and having clients constantly trying to text us pictures of documents and getting them printed out and getting them uploaded. I mean, it's, I'm sure everyone in the audience understands that pain. It just was frustrating and inefficient.

And so we presented our problems to our practice innovation group, which Beth is a part of. And we basically said, "Can you help us? What exists in the world that could fix this that could help us be able to collaborate?" And there really wasn't a good enough off the shelf product for it, but the practice innovation team really had a vision that we could build a product that would serve all of these needs and which would really allow us to expand our work. Not only our office, but to collaborate with other people to help clients.

And so we worked with our practice innovation team and with the developer who you'll hear about in a little bit from Beth, and we together created this customized platform. And we've piloted it. We really love it. It enhances our efficiency, our organization, our communication, and it really takes the place of that conference room table that we are missing so, so much. So, that's really, I would say, the genesis of it. But I have to say, even though we are back in our offices, I mean, here I am at 425 Lexington in Midtown, and we are just thinking about how we're going to integrate everything we do onto this platform regardless of whether we're in the office or not. Because honestly it's just the most efficient, easiest thing to use and we've really benefited from that. That's the longer answer.

Peter Kempner:

So you alluded to this already, but Beth, why don't you tell us who is Theory and Principle, and how are they involved? Can't hear you, Beth. You're muted.

Beth Lambdin:

Thank you. Thank you. Yes. So Theory and Principle, as Harlene mentioned before, they're a developer, they build mobile applications and web and mobile applications that are really geared towards improving the legal experience. So this is their place, this is their space where they play in the legal space, but more importantly they're really renowned for developing innovative and bespoke technology and digital products and they are really masters at refining the actual design. And they do that by creating a really simple and intuitive user experience. And that is something that we knew that we wanted. We wanted to make this as easy for people to jump into as it possibly could be without having to have extensive user guides and all of these other extensive training sessions. And I think that they've really delivered on that.

We also really thought they would be the perfect partner, not only on this expertise but just in the way that they were able to partner with us. We met regularly for almost a year. Harlene's team really just was so generous with their time and giving the benefit of what the pro bono experience has been like so far at Simpson Thacher, but Theory and Principle was able to take that knowledge, that subject matter expertise, and really then add their own experience and the benefits that they have from having worked with other clients in the legal field to make suggestions on things that would make the platform itself make the transition over to the digital world, make that as seamless as possible, and make sure we were able to benefit from things and think about things that we might not have thought about in the analog world.

So we really built this for scalability, for flexibility. I think Harlene was super excited when she realized that she's going to show you that she can add and create new clinics on her own really easily. And they were able to do that in such a way that made it exciting for the administrators as well. And I think, we've done this demo a couple times, and I think every time we've gotten the feedback about how beautiful it is. It's aesthetically compelling and that's something else we're really excited about.

Just one last thing I want to add is that when we partnered with Theory and Principle, it was really important to both of our teams that this was going to open the door for other organizations and that they would be able to, other organizations, would be able to benefit from this work. We wanted it to really be a gateway to greater access for justice. So, we built access upon a foundation of something that's actually called virtual law clinic that Theory and Principle is now offering on a subscription basis. So they're going to be able to run with all of this work that we did together and have other organizations really benefit from this. It's available to law firms, corporate pro bono teams, universities, legal services organizations, and it's on a subscription basis. So if you want to reach out to Theory and Principle for even more in depth demo than what Harlene and I are going to give, then please do so.

Peter Kempner:

Great. Thanks, Beth. And, Harlene, you talked about this a little bit and VOLS and Simpson have been working together for years and years and years on DACA cases. And I've been to the DACA renewal clinics, I miss the lunches that you mentioned personally, but obviously it's tough to schedule clients in, folks have to take part of the day off to get there. And this creates greater access even in the post COVID world. And so, and also on the legal services side of things as well, cutting out the travel time, being able to jump in and jump out as needed, using this platform in so many different ways has been great. And I know we did our first clinic with you all on the platform just a couple of months ago and it went really smoothly. So, can you talk a little bit about how Simpson and legal services providers collaborate on things like the DACA renewal clinics?

Harlene Katzman:

Yeah. Thanks for asking that because that was a really important piece that we built into this clinic that we didn't even, I mean, that wasn't even originally contemplated when we first started talking about it. But it dawned on me that it could make our communication with the legal services provider a whole lot easier and I'll tell you why. For example, when we would have clinics right after COVID hit, and we were trying to keep our application based and other clinic based work on track only using Zoom, we would have a legal service provider sitting in a Zoom room and maybe the lawyers would be scribbling applications on their desk in front of them by hand, whatever. And for the legal services provider to review it, they would need to share the screen of a picture of the document where the legal service provider could be like, "Yeah, I think you have to change that. That looks good. That looks good." Not super-efficient for anybody, and we really don't like to do lot of work without our legal services partners who are experts in the field that we are not.

So, we built into this platform a legal services provider view and a way to come into the platform, look at the cases that they have referred to our firm, keep track, know where each one of those cases is, what the status is of each case, and be able to look at the documents to review them on the screen. Download the documents, make changes, upload the documents, send notes to the attorneys. And we didn't have any type of, we didn't have anything that allowed the legal services providers that much access to what we were doing, even though we don't send anything out without legal services provider review. So it was just yet another way in which that collaboration was made easier. And I'm excited to show it to you because I'm going to show you the legal services view when we get to the demo. And maybe we're there now, Pete. I don't know. You tell me.

Peter Kempner:

I think we're there now. I think enough talk and let's show us how it works.

Harlene Katzman:

Okay. So I think you have to stop sharing your screen. There you go.

Peter Kempner:

Okay. I did.

Harlene Katzman:

Okay. And for the 30 attendees that we have here, please know, I do not use Teams regularly. I have practiced, but if I mess up, please don't hold it against me. I'm trying very hard. So here is my Teams screen share, and I'm actually going to show you our first view. All right. Hopefully you can see that. Right? Do you have the a... Yes. Beth is my check. We have the admin view. So welcome to Access by Simpson Thacher. Here is the first view that we're going to look at and let me explain what I mean by views. This platform has a view that is different for an administrator than it is for a legal volunteer, than it is for the legal services provider. So I'm going to show you three different views today and you'll see what I mean when I show them to you.

The fourth view isn't actually a view, and that's the applicant. I'm not going to call them the client; I'll call them the applicant. The applicant can access the system by uploading documents directly to the platform from a smartphone, and we'll show you that in a little while, but the applicant doesn't actually have access to the platform. So there is no applicant view. The applicant cannot see the communication between the lawyers, they can't see the drafts, they can't see anything. The only thing that they can do is upload documents. We thought it was important for the applicant review and signing, which will probably now be in person or it will be on the phone or on Zoom. But it is more efficient and more secure for us to not have the applicant be able to move things around on the platform. So that's why there are only three views that you'll see today.

This is the first view here. And as you'll see, I'm in as an administrator. And the first thing that I want to show you today is the site management, which is the basis of adding information to the platform. The site management starts with users. This is literally how you add a user. You click a button, you put in all the information, you select the user type. It's either administrator, a client attorney. And what we mean by that would be a partner of ours like a financial institution or a bank that we would be partnering with on a clinic. They would go in as a client attorney, a Simpson attorney, those are ours, or a legal services organization. And it's very easy to create new users. As you can see, we've got lots of users in here already. Here's the difference between an LSO and a Simpson attorney. And you can see we've got a bunch of administrators down here.

So it's very easy to add users. Once you add a user, the system automatically sends an email to that user inviting them to click on a link that takes them to the platform. They create a password, they have an authentication period, and then they're in. So it's very, very simple. This is a list of partner organizations. We're going to be operating as demo legal services today, but we have already collaborated with Legal Aid Society and as Pete said with VOLS, so you can see here how you put in a new legal services organization and you can build in your own client matter numbers and whatever else you want to go in there.

Matter types. We have two matter types going right now with a demo. We're going to be using demo DACA clinic today. This is how you add new matter types. I'll show you how to do that in a minute. And then this is just so you can see our privacy policy which you don't have to read, our terms of service. Again, you don't have to read, you can change them at will. And then we developed an applicant terms of service. These are much more simplified with bullets, and this appears on a smartphone screen for an applicant before they move through and upload documents. You can obviously make this be whatever you want. For us it was important to say things like use of Access doesn't constitute the provision of legal services or create an attorney client relationship. Because for us we would need an applicant to sign an engagement letter or a limited scope agreement before that attorney-client relationship was formed. So that is where all of this lives.

And I thought the first thing I would show you would be how to create a new clinic. It's really called, add a matter type. But is my favorite feature on the whole platform. This lets you create any kind of clinic you want. If I hadn't created the demo DACA clinic, I would do it by adding it here. You get to pick a matter color, and then you get to enter outcomes. So for our outcome questions, let's say this was going to be the DACA clinic. Maybe my first outcome question is date submitted to the USCIS, I probably want this to be in date form. I maybe want that to be required, maybe don't, I'll add it here. I'll add another outcome. And here maybe I want the receipt date. I can make this a drop down long text, short text, doesn't matter. Maybe I don't want this required. And then I'm going to click create matter type. I'm not going to do it here because I've already created the matter, but I just want you to see how easy that is.

So we envision creating many kinds of clinics. We don't only do one kinds of clinic, it could really be anything. Sort of the sky is the limit. The next thing I want to show you is our training and resources, which are here. This may look very chaotic, but it only looks so because you're in the admin view. When I show you the lawyer view, this is going to look a lot more organized. As you can see, when you put in training and resources, you can put in one document that hits two clinics. So let's say you had the basics of interviewing a low income client, or how to work with interpreters, or some document that was really useful for a lot of different kinds of clinics, that's fine. You just tag the clinic to the document and it shows up in each clinic that you tag.

So for our training and resources, I'll just show you how to oops, how to create a new document. It's super easy. If I were going in here and I wanted to create, let's say for training and resources, I want to put in a model DACA application. I want to tag it to the demo DACA clinic, and then I'm going to select a file to upload. I'm not going to do it because it takes a few seconds. But when I select a file, what comes up is my, oops, sorry. You can see all those photos. Is my hard drive. I would double click this. I mean, here, I could do it, no, I'm not going to do it now because it's already in there. I would double click model DACA renewal application and it would be uploaded in here and then I would click save. And that is the ease of creating a new resource.

And then I'm going to show you forms and templates. This is nice because this is a place where you can put a link directly to a form. And for any of you that do immigration work, you know how important it is to pull the latest USCIS form off of the USCIS website. If the form's expired, they will reject it and send it back to you. So we always tell people they have to go into the most recent form and you can put the link to the USCIS website page here. It will always pull up the most recent form, which is really nice. For us, we pre-populate some of these because I sign G-28s for all of our DACA clients, and so we have uploaded some of these as documents instead of links. But you could see it's a very, very easy way to do this. And if I wanted to create an engagement letter template, I would do the exact same thing. Create new, put in the former template, and then here's a click for a link or you upload a file and you just add it here. It's really, really easy.

Okay. So now I'm going to take you to the way that we create a new matter. And so this would mean, Peter and his colleague send us a new client file. They really like parks and rec over there at VOLS and so they have sought out clients named April Ludgate and Ron Swanson. So those are the files that are coming over to us and that's how we're going to use it. So we're going to create a new matter here. And the way that you would do this is you collect, select a matter type, we'd be putting this into our demo DACA clinic. You'd select a client organization. We're not partnering with anyone on this so we're not going to select that. This is coming from a Demo Legal Services. Even though I said, Peter, we're going to pretend he's Demo Legal Services. The creation date would be today and the client matter number for our purposes we could put in whatever client matter number we wanted. We click next and then goes the name of the client.

So I'm not going to fill all this out because I have already created April's file, but this is the exact way I did it. I clicked next and then I clicked save and that was the way to create the file. And I will show you the file because it is in open matter. And here is April Ludgate's file. She's sitting next to her friends Ann Perkins and Ron Swanson. It's nice that she's not alone. So, let's see where we are. Okay. So notice in our April Ludgate file that we have tagged the legal services organization. They are in her contact information. Here's her contact information, and we've tagged the legal services provider here, which is how this is going to come back when we see the legal services provider view in a little while.

Okay. So now we look at open matters and I'm going to start assigning lawyers. And I'm actually going to assign April Ludgate to me as a lawyer. I'm in here twice with two different emails, which is how I'm getting away with this. Here is me as a lawyer, STB attorney, and then I'm going to click save. And now that matter has disappeared from my open file and it's going to exist in my assigned matter file because I have assigned the matter. That's how easy it is to assign a matter. You can assign one, two, however many lawyers you want to a matter. And that means everybody who's assigned will get access to that file.

So now I'm going to switch accounts. We're going to leave the administrative account and you can see up here in the upper right hand corner that I'm in as an admin. So I'm going to just click over. I've already logged into myself as a lawyer. I'm just refreshing to get my assigned matter. Oh, it didn't come up, Beth.

Beth Lambdin:

Is it? If you go to assigned matters, there's one there. It's not, I think probably because you'd already had it assigned before you didn't get that type of application.

Harlene Katzman:

Oh, I'm still an admin. I'm sorry. It's because I'm still an admin. Now I'm in-

Beth Lambdin:

Now you're an LSO.

Harlene Katzman:

Not a problem. This will just take a minute. Very quick. Sorry. Now you all know my personal... Here we go. So this is me as a lawyer. Sorry about that. And you can tell that I'm up here and you can see that I've been notified that a new matter has been added to my active matters list. So I'm going to accept this matter. I'm going to look into April and here's my new matter. Great. I've been assigned a new matter. I'm very excited about this. Here are the attorneys assigned. Here's my training and resources that are relevant. Here's my forms that are relevant. And we'll go through that in a minute.

The first thing I'm going to do is I want to request a document from the client. Because I see that there's a passport in here but there's thing else. And let's say the thing I really need is a driver's license. I'm going to type April a message in here, please upload your driver's license. Thanks. I probably would not quite do that. I would write it a little more formally than that, but that's okay. I would click submit request. I'm not going to do that because I've already done this. We've set it up so that you could quickly see what happens on the other side. So I click submit request, and then I'm going to give this over to Beth and she can show you what happens on the other end.

Beth Lambdin:

Thanks, Harlene. So, let's see here. I'm going to go to screen two. Can you see my screen here now with my outlook?

Peter Kempner:

Sure can.

Harlene Katzman:

Yeah.

Beth Lambdin:

Okay, great. So since I already generated the email earlier, but basically this person April is going to get an, now we're doing this on our laptop for the demo, but the more likely use case is that this person would be receiving this on their phone. And one of the great things about Access is that it is configured for mobile use. In fact that's how we really anticipated that it would be used by most of our client applicants. So they would get an email. As you can see here, they can actually choose a Spanish experience. So this, if I clicked on this, this would change all of the copy to Spanish text. And then all I need to do is hit upload document.

Did I click it? I'm getting a little impatient. And then I just need to enter the email address. Pick next. And then as Harlene had mentioned before, we really try to simplify our terms and our privacy policy, distill them into these bullet points. So they weren't getting the huge long text right in the beginning, but we did want them to have to acknowledge this. So once they accept, they're taken to this screen, and again, you can imagine this on a phone, they can just take a picture of their driver's license or their passport or whatever it needs right from their phone and then they just need to navigate to where it is. And oops, I did the wrong one, but I guess it doesn't really matter for this. Did I pick... Oh, and then I have to give it a title. And then I simply hit upload. Actually and then I submit and then that file will be able to be viewed by the admins and the attorneys that have been assigned to that matter.

And I'm going to stop presenting. I think I picked the wrong file Harlene. My fake driver's license that I actually created is not the right one so you're going to see a PDF instead when you log in.

Harlene Katzman:

Totally fine. So can you see my screen again now?

Peter Kempner:

Yeah.

Harlene Katzman:

Great. So we're back in April Ludgate's folder and I'm still the lawyer looking at this. I'm going to refresh the screen because we're waiting for Beth's, look at that, driver's license, it just appeared. So I now have that document. I can download it directly onto my computer here, or I can edit it. I can edit the title, I can edit whatever I want. I can give it a new name, whatever I need to make that make sense for our purposes. So that's how that works.

I want to show you the training and resources from the lawyer's point of view. It's nice because you can really customize these any anyway you want. So if you didn't see me go in here, I'm now in training and resources which is on this box on the side. I'm just looking at the general instruction for attorneys participating in the clinic. We wrote this. This is an overview of what we're doing here and we've also included a document that we'll download and that document is a step by step instruction for our particular clinic. You can make this anything that you want, but this is how we do it.

The other thing that's nice in here is that you can see all of the training materials in here including you can upload a video link. If I clicked on this video link, a screen would open in Chrome and I would be able to watch this video. We decided to put things about CLE credit in here, but you can really do this in any way you want. So it's a really flexible system. This is the only thing that we need for resources for our DACA clinic right now, here's our model application, our training. And then in our form section, this is everything that we need for the form.

This is our cover letter template that gets filed with USCIS. This is our engagement letter template that we use with clients. This is going to be a link to a form. This is going to be a pre-populated form, and this is going to be a link to a form. And you can see what this looks like. Oops, sorry. If you just click on view form it goes straight to the form that you need to fill out. I would then download this form, which would come up here. I would fill it out offline and then I would upload it back to the clinic, which actually I can do for you now so you can see what it looks like when it goes back onto the clinic. So I'm going to download this. I wish this part were a little bit quicker. This is always my frustration in the demo that it takes a few seconds. So I'm going to do this for Ludgate. I'm going to save it. I'm going to put April's last name in here. I'm going to save it. Actually I think it saves automatically and then I'm going to-

Beth Lambdin:

I don't believe it does save automatically. You have to save as on your local drive. Yeah. And then re-upload.

Harlene Katzman:

Okay. So you see this. Yeah you're right. So this is the part-

Beth Lambdin:

This part is, by the way, something that we're on our roadmap that we are talking to Theory and Principle about is where we would be able to just, to have the documents be able to be open and save directly in the environment. But we had to go incrementally.

Harlene Katzman:

And you can see I just closed out my demo by accident. And this is part where I said to people, hey, I’m not so great with the tech and Teams and I apologize for any mistakes, but luckily I will get it right back up. Come on. There we go. All right. Anyway, we're not going to do that again on Teams. Let's just go back into our clinic which is loading here right now.

Beth Lambdin:

I think you just need to hit share too Harlene.

Harlene Katzman:

Thank you. Now it is... There we go. Okay. We're back. Sorry about that. Anyway. So we were talking about the forms and what I'm not going to show you because it's a little wonky on Teams is that when you download, fill out and upload back in these gray boxes turn into green checks when you're finished with them. And what you can do when you're done with everything for a check is that you mark it complete, which I now, oops, don't see because I have no green checks. There would be a box down here that says mark as complete. And once I mark as complete, the file would move into this under review category. And that is how we would all know that it's ready for review either by an administrator or by the legal service provider. And that is the progression of the matter as it moves through.

The other nice thing is that once a matter is done, you can see all of the assigned outcomes in there. And I don't know if I can get there from here, Beth. Let me see if I have. Let me get April under review. Hang on one second.

Beth Lambdin:

I was answering a question on chat Harlene, so I'm not sure... Okay.

Harlene Katzman:

I'm going to say ready for review. It has now been marked ready for review. So now I find the matter under review. And when I open matter, I can actually enter the outcomes assigned here, which I do. You have to remind me where I do that.

Beth Lambdin:

So you have to close it first. So yeah, you're going to hit on April Ludgate and then there when you close it, it will give you the outcomes form.

Harlene Katzman:

Oh, I have to close it. Yeah. That's right. There we go. Okay. So, okay. I'm not going to close it because I want to keep it open to do some other files. But my point is, and again, sorry about... Sorry, folks. It moves from active, open, under review to close matters. You can reopen things at any time, but the nice thing is that it gives the administrators a sense of when something is complete from the lawyers point of view, and then lets the administrators note in the system when it's complete from our point of view. So from the lawyer's point of view it may be complete when they have finished the application and sent it out for review. And then from our point of view, it may be complete when we actually submit it to USCIS. And those things get tracked through the system.

I want to switch accounts now to the legal services view, which I think I popped out of. I did. So I'm going to have to come back in really quickly. I'm sorry. I will very quickly get this.

Beth Lambdin:

And that's actually a good thing to bring up for folks that have been asking about where this is hosted and for people concerned about security. Again, you might be a different experience for those that might go to virtual law clinic on a subscription basis. But for external users like an LSO, we would require this two factor authentication. Whereas so far we've only been demo-ing internal Simpson Thacher employees so they're able get in through our single sign on.

Harlene Katzman:

Right. So now I'm in as a legal services organization. You can see up here, here's my LSO. I can only see three matters. Two of them are open, one of them is under review and that's because those are the only matters I have tagged to Demo Legal Services. But the nice thing as a legal service provider is that I can go right into the file, I could go into the forms and I will be able to go into the form that would then exist right here. I can download it. I can review it and I can make comments. I can change it. I can do whatever I want and upload it back again. They have the same editing function as an attorney on the matter. I can also see any of the activity and communication log. I can add a comment in here if I want. There's all kinds of... I can download everything if I want to take a look at all of the documents together. I have full access to what I need from in here.

I can make suggestions about the training. I can remind someone that a form has been updated. I can do whatever it is that I want to do. Which is really nice. I also can see what matters haven't been assigned yet to attorneys and say, "Hey, I gave you these a couple weeks ago. What's going on with them?" It just gives a legal services provider a lot more insight into the progression of the matters that they've given us. So that's the basic demo. And I figured we could take a little, we've got about 10 minutes and I figured we could take some time to answer questions. I'm also happy to go back into any view and show anybody a piece of it that they had a question or if I moved too fast. So please let us know if you have some questions there.

Peter Kempner:

Thanks, Harlene and Beth. So the chat's been active and I know there's been some answers put in already, but I thought it might be helpful to go over some of the things even if they've already been answered that have been put in the chat. And so Christine's first question was, does Simpson plan to use this platform for other kinds of clinics with other legal services providers? And Harlene?

Harlene Katzman:

So, what we have on here now is a conviction relief clinic. We're doing certificates from relief of disabilities, which for any of you that work in this space in New York know that this is a very narrow form of relief for people who are applying, especially for state licenses and need a letter from the state saying that they've served their time and they believe them to be rehabilitated enough to get a license. It's not a great form of relief, it's not even a record sealing or an expungement, but we do do them because that's what New York has. And the other thing that we've been doing is DACA in here. We are actually about to load a new clinic. Immigration is not going to be a clinic anymore, we're going to get more specific. We're going to make one of our clinics DACA, one of our clinics TPS, because we're going to start doing both Afghan and Ukraine TPS clinics and then we are also loading naturalization applications on here that we're going to do in Teams with one of our billable clients.

But we also could expand this to, we did an Iraq clinic with legal services last year to get some of that rent assistance benefits from the federal government, that could have gone on here. We can really see a lot of different things that could go on here in all kinds of areas of law. And because the platform is so flexible, really anything you can dream up that involves client documents, applications, training and resources can go on this platform. Which is really almost everything. So it's quite flexible and quite nice.

Peter Kempner:

Right. And Harlene, we talked about doing perhaps a wills clinic over it at some point in the future.

Harlene Katzman:

Yes. That would be perfect on here. That wills clinic would be, this would be a great platform for that.

Peter Kempner:

Great. And so there's been a series of questions about cloud based, which I think Beth talked about a little bit. And also it seems that the CEO at Theory and Principles joined us today. I don't know if Nicole's able to unmute herself or not, but she did put her contact information in the chat. So if you're interested in contacting them, go ahead-

Harlene Katzman:

Can I add something about Nicole and her Theory and Principle team, we weren't, she would tell you that we were easy clients. We were not easy clients. Every time we would pilot out a part of this, we would go back to her and say, "This works, but it could work better. This really isn't right. This could be improved by doing this." And they kept, we kept at it and their team just kept making it better and better and better. And they're incredibly responsive to the needs of the user experience. And so if another firm or another organization uses the platform, Theory and Principle has the ability to customize this for them as well. I mean, we've done the basics of it here, and I think the basics would be similar for anyone using it. But the customization is really sky is the limit I think.

And they're really, really good at that. They're really good at listening to what you as a lawyer and as a project manager need, and converting it to the technology. That's something that I obviously didn't have the head for. I came in on one side of it and they were really, really good at understanding that translation and to creating it on the screen.

Peter Kempner:

And there's a question about, did VOLS partner with you to inform what the LSO view should include? I know the answer. Not exactly, but can you talk a little bit about how you thought about our side of things.

Harlene Katzman:

So, I mean, honestly, I'm going to give a shout out to one of your colleagues, Peter, we work with Jennifer Guzman in the immigration unit, and we talked her through it. We talked to her, we said, "What do you do when you create a matter for us? What are the things that annoy you and what are the things that, how do you do it?" And she was like, "I just want to be able to click buttons and get you the client files. I'm tired of having to break up PDFs. I'm tired of getting files rejected. I don't want to have to think about that." And so one of the most important user experiences from the LSO side was an ease of use where they could sit at their computer, open a client file, click upload, it would take them to their computer and they could just select the files that they wanted to upload, either together in a batch or individually, and that they could put them into each client file for us.

When Jennifer did the first batch for us, she said she had saved an enormous amount of time. She was like, "This was the easiest thing I have ever done in terms of file transfer." So it's seamless and that was the most important piece to us. The other piece was just to be able to have the legal services provider look at an application or a cover letter or whatever it is that you're producing just to review it so that it doesn't have to get scanned or marked up or email, and then you do check changes and you email back. You can just go in, look at it. It's good, if it's not good you make changes. It's all in one place. And so I think those were really the two pieces that were important to us and that we had heard from the LSO was important to them.

Peter Kempner:

And I know that after that first clinic that Jennifer was just enamored with the platform. She's like, "Oh my God, I love this. This is great." There's a question about any kind of virtual consultation feature. So I'm assuming a live chat. And Beth answered it, but maybe you both could talk a little bit about what you envision perhaps with the future for that.

Harlene Katzman:

We talked about this. Beth, do you remember? We had ongoing conversations with Theory and Principle about whether we should build that in. And the truth is we didn't think we needed it. Because we have Zoom, we use zoom. Clients are familiar with Zoom. I had had an experience with a clinic out in LA where we had used their own customized communication platform to meet with clients. It didn't work well and they abandoned it and started using Zoom. And the truth is that our lawyers can sit with the platform open on one side of their computer or on one computer and Zoom opened on the other, and they can talk to the client here and chat with the client in chat and do the work on the platform on the other screen. And if there are two of them working on it, they can each be working in their office.

And if there are two of them working on it, and one is from Simpson Thacher and one is from a bank, they can also both be working on it at the same time in the same place. Which you could never do because you can't share access to your platform with people outside of your colleagues that you work with. So that's why we didn't build it in. It just seemed unnecessary. There is a communication chat function in here in the, you can do it as a lawyer, you can do it as admin. Oops I'm just finding my admin site. Oh, I'm not sharing my screen. Sorry. Beth you're on mute.

Peter Kempner:

You are. You are. It's up.

Beth Lambdin:

Yeah. It's part of the activity log if you're in as the lawyer view where we showed you that you can see all the recent activities, you can put comments in there. So yeah, we're looking again on the roadmap. We're scoping things like an iManage integration. Right now we really wanted to start with the basics to make sure it works right. Get all the kinks out, make sure that the workflow and the user experiences as we hoped it would be very straightforward and easy. And I mean, as Harlene had mentioned before, I think the sky is the limit once we start to realize where we want to scale it out and make it more robust, but we are still using outside tools such as Outlook in conjunction with the tool.

Peter Kempner:

Great. And I think we're actually at time or about 30 seconds away from time. And so just to wrap up, from the legal services perspective, the law firms have so many resources and so much technology at their fingertips that us legal services organizations do not have. And it has been so fantastic that Simpson has brought this technology. Thought about pro bono when they built this. Thought about partnering with legal services organizations when they did this. And so we are immensely grateful to Simpson for thinking about that, thinking about VOLS and including us in the early stages of rolling this out. And it is beautiful. It is such an intuitive good looking platform and really grateful to be part of it. And so thank you to everybody for coming today. And Beth had put in the chat her contact information so folks who have other questions they'll feel free to reach out to her. Take care, everyone.

Harlene Katzman:

Thank you.

Beth Lambdin:

Thank you.