



API Data Projects in Legal Services

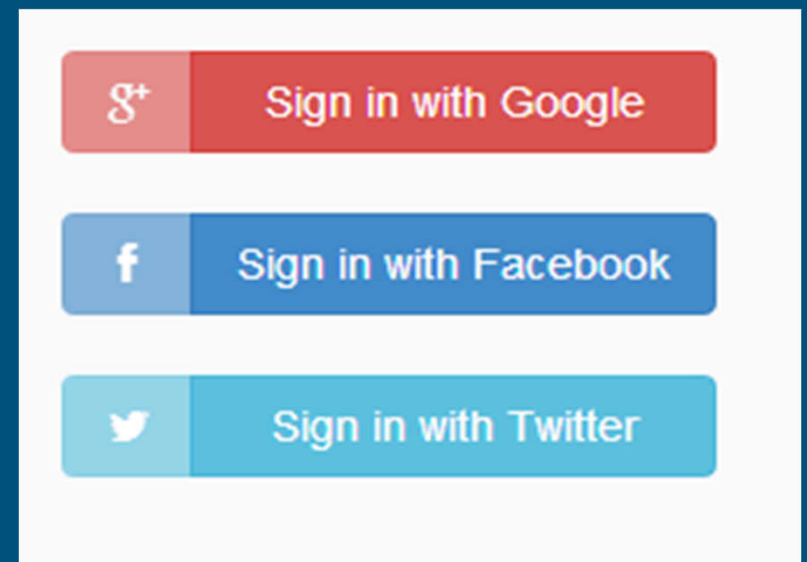
Mallory Curran
Jonathan Pyle
Christopher Schwartz



Application Programming Interface (API)

Common Examples:

- Address Verification
- Google Maps
- Third Party Payment/Login



Mallory Curran

- Consultant focused on legal services, medical-legal partnership, & technology.

MALLORY
CURRAN

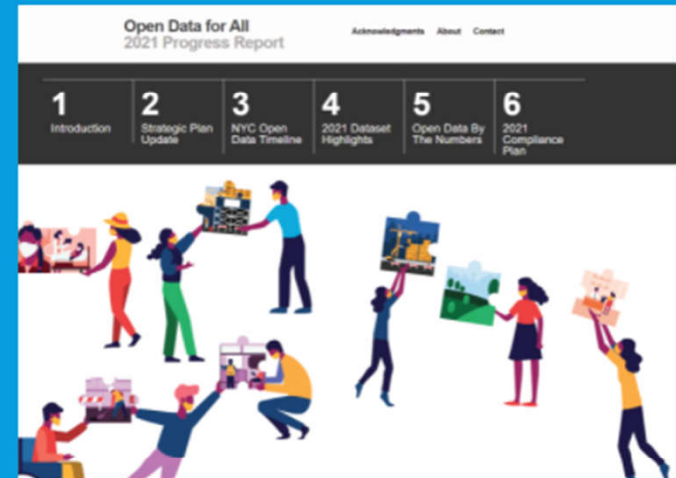
Consulting

API Example:
Using NYC Open
Data to benefit
tenants &
advocates

Open Data for All New Yorkers

Open Data is free public data published by New York City agencies and other partners. **Share your work during Open Data Week 2022** or **sign up for the NYC Open Data mailing list** to learn about training opportunities and upcoming events.

Search Open Data for things like 311, Buildings, Trees



Learn about the next decade of NYC Open Data, and read our 2021 Report

Translate »

BETA Introducing our new data shaping and exploration experience: Filter, group, aggregate, and more! [Try it now](#) [Learn more](#) ✕

Housing Maintenance Code Violations

Housing & Development

Pursuant to New York City's Housing Maintenance Code, the Department of Housing Preservation and Development (HPD) issues violations against conditions, in rental dwelling units and buildings, that have been verified to violate the New York City Housing Maintenance Code (HMC) or the New York State Multiple Dwelling Law (MDL).

[More](#)

About this Dataset

Updated
April 5, 2022

Dataset Information

View Data Visualize ▾ Export API ⋮

Access this Dataset via SODA API ✕

The Socrata Open Data API (SODA) provides programmatic access to this dataset including the ability to filter, query, and aggregate data.

[API Docs](#) [Developer Portal](#)

API Endpoint

`https://data.cityofnewyork.us/resource/wvxf-d` JSON [Copy](#)

NYC Housing Data Available via API

- Housing maintenance code violations (“Violations”)
- Multiple dwelling registrations (MDR)
- Housing Preservation & Development (HPD) Litigation
 - including tenant actions, heat & hot water actions, false certification of non-lead
- Previous evictions (actual evictions, not eviction filings)
- Vacate orders

Previous Phases of the NYC Housing API project

- Connection with Who Owns What
- Pulling data available into case notes

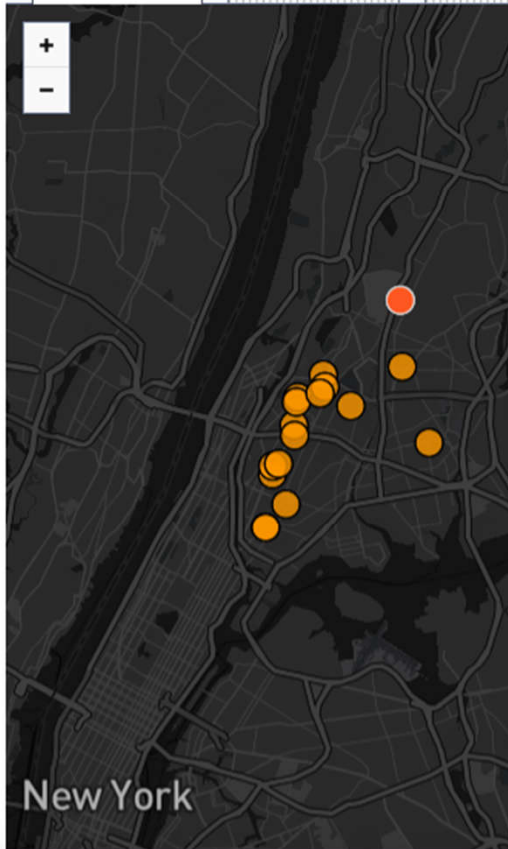
Harry Potter (Violations)
Case No: (17-0111035) ▼

Case Email
Disposition: Open
Case Status: Accepted / Investigating
Date Open: 09/26/2017
Advocate: Mallory Curran
Case Summary
Contact Summary
Assignment Summary

PORTFOLIO: Your search address is associated with 22 buildings

New Search Export

Overview Timeline Portfolio Summary



BUILDING: 3915 Carpenter Avenue, Bronx

Boro - Block - Lot (BBL)		Year Built	Units
2 - 04819 - 0015		1940	51
Open Violations	Total Violations	Evictions	Δ RS Units
51	815	10	1 → 0

(hover over a box to learn more)

View data over time ↗

Most Common 311 Complaints, Last 3 Years

- PAINT/PLASTER (36)
- WATER LEAK (30)
- PLUMBING (30)

Who's the landlord of this building?

Learn more

JAY ZANGER



Useful links

- View documents on [ACRIS](#)
- [HPD Building Profile](#)
- [DOB Building Profile](#)
- [DOF Property Tax Bills](#)
- [ANHD DAP Portal](#)

Harry Potter (Violations)

Case No: (17-0111035) ▼

Case Email

Disposition: Open

Case Status: Accepted / Investigating

Date Open: 09/26/2017

Advocate: Mallory Curran

Case Summary

Contact Summary

Assignment Summary

approveddate: 2013-10-09T00:00:00.000
originalcertifybydate: 2013-10-23T00:00:00.000
originalcorrectbydate: 2013-10-18T00:00:00.000

06/07/2019	Vacate Order import (updated by City on 1st of month)	Mallory Curran	Vacate Order Information	N/A	No	Edit Delete/Transfer
------------	---	----------------	--------------------------	-----	----	--------------------------------------

▼ building_id: 896801
vacate_order_number: 100282
primary_vacate_reason: Illegal Occupancy
vacate_type: Partial
vacate_effective_date: 2012-11-23T00:00:00.000
number_of_vacated_units: 1
bin: 3392424
bbl: 3013480010

building_id: 90265
vacate_order_number: 142395
primary_vacate_reason: Fire Damage
vacate_type: Partial
vacate_effective_date: 2018-01-10T00:00:00.000
actual_rescind_date: 2018-09-12T00:00:00.000
number_of_vacated_units: 7
bin: 2017700
bbl: 2033240104

building_id: 688955
vacate_order_number: 145612
primary_vacate_reason: Illegal Occupancy
vacate_type: Partial
vacate_effective_date: 2018-09-26T00:00:00.000
number_of_vacated_units: 1
bin: 4300123
bbl: 4157020063

building_id: 361981
vacate_order_number: 145817
primary_vacate_reason: Illegal Occupancy
vacate_type: Partial
vacate_effective_date: 2018-09-27T00:00:00.000
number_of_vacated_units: 1
bin: 3087219
bbl: 3039280025

View Imported Building Data

Building API Results

0% Complete
Create PDF

Test Test
Case No: (17-0122806) ▼

Case Email

Disposition: Open

Case Status: Test Case / Do Not Report

Date Open: 10/03/2017

Advocate: Mallory Curran

Case Summary

Contact Summary

Assignment Summary

Address Searched Most Recently

Full Address 1800 Albemarle Rd
Brooklyn, NY 11226

If you just requested data but don't see today's results, please click on a tab or refresh the page.
If you haven't yet requested data, please go to Request Building Data from the Actions Menu.

- * **AEP**
- CONH
- HPD JURISDICTION
- HPD LITIGATION
- MDR DATES
- VACATE ORDERS
- "C" VIOLATIONS

[Click Here for Information on the Alternative Enforcement Program](#)

all 33 results Note Type = API - AEP Notes (x)

Date Posted	Subject	Created By	Note Type	Updated	Emailed	Actions
09/24/2021	AEP Info (updated by City on 1st of Month)	Mallory Curran	API - AEP Notes	N/A	No	Edit Delete / Transfer
▼ aep_start_date: 2020-01-31T00:00:00.000 of_b_c_violations_at_start: 1825 current_status: AEP Discharged discharge_date: 2020-11-05T00:00:00.000 aep_round: Aep Round 13 bbl: 3051220001 building_id: 183906 total_units: 72						

View Imported Building Data
Toggle Sidebar

Building API Results

0% Complete
Create PDF

Test Test
Case No: (17-0122806) ▼

Case Email

Disposition: Open

Case Status: Test Case / Do Not Report

Date Open: 10/03/2017

Advocate: Mallory Curran

Case Summary

Contact Summary

Assignment Summary

Address Searched Most Recently

Full Address	1800 Albemarle Rd Brooklyn, NY 11226
--------------	---

If you just requested data but don't see today's results, please click on a tab or refresh the page.

If you haven't yet requested data, please go to Request Building Data from the Actions Menu.

- * AEP
- CONH
- HPD JURISDICTION
- HPD LITIGATION
- MDR DATES
- VACATE ORDERS
- "C" VIOLATIONS

all 33 results Note Type = API - MDR Registration Dates

Date Posted	Subject	Created By	Note Type	Updated	Emailed	Actions
09/24/2021	MDR Dates import (updated by City on 1st of month)	Mallory Curran	API - MDR Registration Dates	N/A	No	Edit Delete / Transfer
▼ registrationenddate: 2021-09-01T00:00:00.000 lastregistrationdate: 2020-10-12T00:00:00.000 bin: 3117590 boro: BROOKLYN boroid: 3 block: 5122 lot: 1 registrationid: 320157						

Current Phase of the NYC Housing API project

- Limitations of Previous phases
 - Super helpful
 - But advocates requested that the data populate structured data points (“fields”) in LegalServer
 - Easier viewing / comprehension
 - Ability to run reports
- Current Phase: pull in data and maintain the capacity to update it over time

*

HOUSING VIOLATIONS

HPD JURISDICTION

HPD LITIGATION

AEP INFORMATION

MDR INFORMATION

AEP Round	Aep Round 13
AEP Current Status	AEP Discharged
AEP Start Date	01/31/2020
AEP Discharge Date	11/05/2020
AEP # of b/c violations at start	1,865
Neighborhood Tabulation Area NTA	Flatbush

* HOUSING VIOLATIONS HPD JURISDICTION HPD LITIGATION AEP INFORMATION **MDR INFORMATION**

MDR Dates

MDR Registration ID (Case text)	200569
MDR Most Recent Registration Date	08/28/2021
MDR Registration Expiration Date	09/01/2022

MDR Contacts

[Run TEST MDR Information Report](#)

Ordering: MDR Contact Type, Type Descending
Viewing 1 - 20 of 27 [\[View All\]](#)

MDR Contact Type	MDR Contact First Name	MDR Contact Last Name	MDR Corporation Name	MDR Contact Business House Number	MDR Contact Business Street Name	MDR Contact Business Suite Number	MDR Contact Business City	MDR Contact Business State	MDR Contact Business Zip	MDR Contact Title	MDR Contract Description	Start Date	xMDR Registration ID (Case)	Type	MDR Registration Contact ID	HPD Registration ID	MDR Registration ID (Case text)
Agent	JAY	ZANGER	3915 ASSOC LLC	1419	AVENUE J		Brooklyn		11230		LLC		0	TEST - MDR Contacts	20056904		200569
CorporateOwner			3915 ASSOC LLC	1419	AVENUE J		BROOKLYN		11230		LLC		0	TEST - MDR Contacts	20056903		200569
HeadOfficer	JAY	ZANGER		1419	AVENUE J		BROOKLYN		11230	AGENT	LLC		0	TEST - MDR Contacts	20056905		200569

[* HOUSING VIOLATIONS](#)
 [HPD JURISDICTION](#)
 [HPD LITIGATION](#)
 [AEP INFORMATION](#)
 [MDR INFORMATION](#)

[Run TEST HPD Litigation Report](#)

Ordering: HPD Litigation Case Date Open Descending, HPD Litigation ID Descending
 Viewing 1 - 9 of 9

HPD Litigation Case Date Open	HPD Litigation Case Type	HPD Litigation Respondent	HPD Litigation Case Status	HPD Litigation Case Judgement	HPD Litigation Finding of Harassment	HPD Litigation Finding Date	HPD Litigation Penalty	HPD Litigation ID	Type
01/02/2020	Tenant Action/Harrasment	ASHER PASKES,MARION EQUITIES LLC	PENDING	NO	After Inquest	01/16/2020	2000	367556	TEST - HPD Litigation
12/03/2019	Tenant Action	MARION EQUITIES LLC	CLOSED	NO				365619	TEST - HPD Litigation
11/13/2019	Tenant Action/Harrasment	MARION EQUITIES LLC	CLOSED	NO				364161	TEST - HPD Litigation
11/13/2019	Tenant Action/Harrasment	ASHER PASKES,MARION EQUITIES LLC	PENDING	NO	No Harassment			364159	TEST - HPD Litigation
11/12/2019	Tenant Action/Harrasment	ASHER PASKES,MARION EQUITIES LLC	CLOSED	YES	After Inquest	01/06/2020	2000	364370	TEST - HPD Litigation
11/12/2019	Tenant Action	MARION EQUITIES LLC	CLOSED	NO				364162	TEST - HPD Litigation
07/17/2017	Access Warrant - Non-Lead	ASHER PASKES,MARION EQUITIES, LLC	CLOSED	NO				311371	TEST - HPD Litigation
05/26/2017	Tenant Action	ASHER PASKES,FRIMY GOLDBERGER	PENDING	NO				311750	TEST - HPD Litigation
11/29/2016	Heat and Hot Water	ASHER PASKES,FRIMY GOLDBERGER,MARION EQUITIES, LLC	CLOSED	NO				297278	TEST - HPD Litigation

Unique Count:
9

viewing 1 - 12 of 12

Client Apartment #	HPD Violation Apartment	HPD Notice of Violation Description	HPD Violation Current Status	HPD Violation Status (Open / Closed)	HPD Violation Class	HPD Violation Rent Impairing	HPD Notice of Violation Issue Date	HPD Violation Original Certify By Date	HPD Violation Current Status Date	HPD Violation Original Correct By Date	HPD Inspection Date	HPD Violation Approved Date	HPD Notice of Violation ID	HPD Violation Type
1D		SECTION 27-2031 ADM CODE PROVIDE HOT WATER AT ALL HOT WATER FIXTURES IN THE ENTIRE APARTMENT LOCATED AT APT 1D, 1st STORY, 2nd APARTMENT FROM NORTH AT EAST	CIV14 MAILED	Open	C	Y	02/22/2022	03/04/2022	03/04/2022		02/19/2022	02/19/2022	7687154	Orig
1D		SECTION 27-2005 ADM CODE PROPERLY REPAIR WITH SIMILAR MATERIAL THE BROKEN OR DEFECTIVE CERAMIC TILES AT FLOOR IN THE BATHROOM LOCATED AT APT 1D, 1st STORY, 2nd APARTMENT FROM NORTH AT EAST	CIV14 MAILED	Open	C	N	02/22/2022	03/07/2022	03/04/2022		02/19/2022	02/19/2022	7687866	Orig
2D		SECTION 27-2005, 2007, 204.1 HMC CODE: ARRANGE AND MAKE SELF-CLOSING THE DOORS ADJUST HINGES IN THE ENTRANCE LOCATED AT APT 2D, 2nd STORY, 2nd APARTMENT FROM NORTH AT EAST	NOV SENT OUT	Open	C	N	02/11/2022	03/14/2022	02/11/2022		02/10/2022	02/10/2022	7636690	Orig
2E		SECTION 27-2056.7, 27-2056.8, 27-2056.9 ADM CODE -CERTIFY COMPLIANCE WITH LEAD-BASED PAINT HAZARD CONTROL REQUIREMENTS DURING PERIOD OF UNIT VACANCY BY PERFORMING ACTIVITIES NECESSARY TO ABATE TESTED LEAD-BASED PAINT FROM REQUIRED WINDOW AND/OR DOOR FRICTION SURFACES FOR APARTMENT AND MAKE FLOORS SMOOTH AND CLEANABLE, POSITIVE LEAD-BASED PAINT IN AN APARTMENT WITH A CHILD UNDER SIX LOCATED AT APT 2E, 2nd STORY, 3rd APARTMENT FROM NORTH AT EAST	CERTIFICATION POSTPONMENT GRANTED	Open	C	N	06/09/2021	07/08/2021	06/18/2021		06/04/2021	06/08/2021	7371588	Orig
2E		SECTION 27-2043.1 HMC INSTALL THE MISSING OR REPAIR/REPLACE THE DEFECTIVE WINDOW GUARD(S) IN ACCORDANCE WITH THE SPECIFICATIONS OF THE NEW YORK CITY HEALTH CODE SECTION 24 RCNY CHAPTER 12. WG TO INSTALL = 0; WG TO REPLACE = 0; WG TO REPAIR = 2; LOCATED AT APT 2E, 2nd STORY, 3rd APARTMENT FROM NORTH AT EAST	FIRST NO ACCESS TO RE- INSPECT VIOLATION	Open	C	N	06/08/2021	07/09/2021	11/24/2021		06/04/2021	06/07/2021	7370331	Orig
2E		HMC ADM CODE: 12½ 27-2017.4 ABATE THE INFESTATION CONSISTING OF MICE LOCATED AT APT 2E, 2nd STORY, 3rd APARTMENT FROM NORTH AT EAST	FIRST NO ACCESS TO RE- INSPECT VIOLATION	Open	C	N	06/08/2021	07/09/2021	11/24/2021		06/04/2021	06/07/2021	7370332	Orig
2E		HMC ADM CODE: 12½ 27-2017.4 ABATE THE INFESTATION CONSISTING OF ROACHES LOCATED AT APT 2E, 2nd STORY, 3rd APARTMENT FROM NORTH AT EAST	FIRST NO ACCESS TO RE- INSPECT VIOLATION	Open	C	N	06/08/2021	07/09/2021	11/24/2021		06/04/2021	06/07/2021	7370332	Orig
2E		SECTION 27-2056.6 ADM CODE - CORRECT THE LEAD-BASED PAINT HAZARD - PAINT THAT TESTED POSITIVE FOR LEAD CONTAINING AND THAT IS	FIRST NO ACCESS TO RE- INSPECT VIOLATION	Open	C	N	06/08/2021	07/07/2021	11/24/2021		06/04/2021	06/07/2021	7370330	Orig

Jonathan Pyle

- Contract Performance Officer at Philadelphia Legal Assistance
- Open-source software developer:
<https://docassemble.org>



API Example: Adding documents to a case file

Philadelphia Legal Assistance

📧 Note Drafts 29

📧 Messages 0

🕒 MyTime 0 HOURS

👤 Jonathan Pyle

🚪 Logout

- Home
- Cases**
- Calendar
- Timekeeping
- Contacts
- Organizations
- Matters
- Report
- Help
- Admin

Home » Cases » Testy Tester (22-0340830) » Main Profile

🔍 Search 📄 Actions 👁 Views 👤 Admin 🛠 Help ⌚ Timer Not Started - 0:00

Testy Tester Case No: (22-0340830) ▾

- Case Email
- Disposition: **Open**
- Case Status: **N/A**
- Date Open: **01/10/2022**
- Advocate: **Jonathan Pyle**
- Case Summary
- Contact Summary
- Assignment Summary

Add Case Note | [Go to Case Notes](#) | [Add Time Slip To This Case](#) | [Open New Case For Client](#) | [Quick Case Copy](#)

- ^ **CASE CONTACTS**
- ASSIGNMENTS
- LITIGATION INFORMATION
- INCOME
- ASSETS

Testy Tester (22-0340830)

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

- CONTACT INFORMATION**
- CLIENT DEMOGRAPHICS
- ACTIVITIES
- SPECIAL PROGRAMS
- UC
- FL

ADVERSE PARTIES

Name Testy Tester [\[Edit\]](#)

Address [EDIT]

Address 3129 N 29th St
Philadelphia, PA 19132

Address is confidential N/A

Testy Tester
Case No: (22-0340830) ▾

- Case Email
- Disposition: **Open**
- Case Status: **N/A**
- Date Open: **01/10/2022**
- Advocate: **Jonathan Pyle**
- Case Summary
- Contact Summary
- Assignment Summary

type any keyword

- Actions
- Closing Options
- Case Copy
- Scheduling
- E-Transfer

- Case Questions
- CBAP Information
- Change Funding Code
- CHU Unit Meeting
- Close Case
- Conflict Check
- DOJ Grant Info
- Edit Address/GIS
- Edit Adverse Party
- Edit Case Status
- Edit Client Name
- Edit Family Information
- Edit Financial Information
- Edit Outcomes
- Fetch documents**
- LITC Information
- MLCP Questions
- Print Cover Sheet
- Recommend Pro Bono/Other Us

Open New Case For Client | Quick Case Copy

INFORMATION INCOME ASSETS

Expand

ACTIVITIES SPECIAL PROGRAMS UC FL

Philadelphia Legal Assistance

Note Drafts 29

Messages 0

MyTime 0 HOURS

Jonathan Pyle

Logout

Home Cases Calendar Timekeeping Contacts Organizations Matters Report Help Admin

Home » Cases » Testy Tester (22-0340830) » Fetch documents

Search Actions Views Admin Help Timer Not Started - 0:00

Fetch documents
Fetch documents was completed on 03/21/2022 by Jonathan Pyle.

[\[Show Steps\]](#)

[Resume Process »](#)
[Create PDF](#)

Testy Tester
Case No: (22-0340830)

Case Email

Disposition: Open

Case Status: N/A

Date Open: 01/10/2022

Advocate: Jonathan Pyle

[Case Summary](#)

[Contact Summary](#)

[Assignment Summary](#)

When you press Continue, documents relating to the property will be e-mailed to the case file. It may take several minutes for the documents to arrive.

[Continue »](#)

Testy Tester

Case No: (22-0340830)

Case Email

Disposition: Open

Case Status: N/A

Date Open: 01/10/2022

Advocate: Jonathan Pyle

Case Summary

Contact Summary

Assignment Summary

Email: Information for 22-0340830 (General Notes)

Posted on 03/21/2022 by System User - [Delete/Transfer](#)

From: Jonathan Pyle <jpyle@philalegal.org>

To: jpyle@philalegal.org

Using address 28 E MONTANA ST

Documents Attached:

Name	Title	Size	Actions
2011_mtg_SECRETARY_OF_HOU.pdf	2011_mtg_SECRETARY_OF_HOU.pdf	160.2 kiB	Download
2015_mtg_SECRETARY_OF_HOU.pdf	2015_mtg_SECRETARY_OF_HOU.pdf	126.07 kiB	Download
2008_deed_SLAYTON_RASHIA.pdf	2008_deed_SLAYTON_RASHIA.pdf	136.83 kiB	Download
Google_Street_View.pdf	Google_Street_View.pdf	80.68 kiB	Download
Philadox-listing.pdf	Philadox-listing.pdf	30.54 kiB	Download
2013_mtg_SECRETARY_OF_HOU.pdf	2013_mtg_SECRETARY_OF_HOU.pdf	150.19 kiB	Download
Department-of-Revenue.pdf	Department-of-Revenue.pdf	177.52 kiB	Download
OPA.pdf	OPA.pdf	4.84 kiB	Download
2018_mtg_MIDFIRST_BANK_SL.pdf	2018_mtg_MIDFIRST_BANK_SL.pdf	599.04 kiB	Download
2008_deed_SLAYTON_RENEE_D.pdf	2008_deed_SLAYTON_RENEE_D.pdf	122.54 kiB	Download
2008_mtg_MORTGAGE_ELECTRO.pdf	2008_mtg_MORTGAGE_ELECTRO.pdf	423.8 kiB	Download

Add Case Note

[Lookup Prime Advocate Numbers](#) | [Add Time Slip To This Case](#)

CASE DETAILS

CALLBACKS

TIME

EVENTS

TASKS

REFERRALS OUT

This Document Prepared By:
VIJENDRA PRAKASH JAIN
CITIMORTGAGE
14700 CITICORP. DR
HAGERSTOWN, MD 21742

When recorded mail to: #:9917737
First American Title
Loss Mitigation Title Services 1348.1
P.O. Box 27670
Santa Ana, CA 92799
RE: SLAYTON - PC REC SVC

Tax/Parcel No. 221135000

[Space Above This Line for Recording Data]

Investor Loan No.: 4418076888703
Loan No: 2005537671

SUBORDINATE MORTGAGE

THIS SUBORDINATE MORTGAGE ("Security Instrument") is made on **DECEMBER 4, 2014**. The grantor is **RASHIA SLAYTON** ("Borrower"), whose address is **28 E MONTANA ST, PHILADELPHIA, PENNSYLVANIA 19119**. The beneficiary is the **Secretary of Housing and Urban Development**, whose address is **Attention: Single Family Notes Branch, 451 Seventh Street SW, Washington, DC 20410** ("Lender"). Borrower owes Lender the principal sum of **FOURTEEN THOUSAND SEVEN HUNDRED SEVENTY-TWO DOLLARS AND 53 CENTS** Dollars (U.S. \$14,772.53). This debt is evidenced by Borrower's note dated the same date as this Security Instrument ("Note"), which provides for the full debt, if not paid earlier, due and payable on **DECEMBER 1, 2044**.

This Security Instrument secures to Lender: (a) the repayment of the debt evidenced by the Note, and all renewals, extensions and modifications of the Note; (b) the payment of all other sums, with interest, advanced under Paragraph 7 to protect the security of this Security Instrument; and (c) the performance of Borrower's covenants and agreements under this Security Instrument and the Note. For this purpose, Borrower

eRecorded in Philadelphia, PA	Doc Id: 51927616
06/26/2008 09:01A	Receipt #: 719652
Page: 1 of 6	Rec Fee: \$156.50
Commissioner of Records	Doc Code: D
State RTT: \$0.00	Local RTT: \$0.00

This Indenture Made this 19th day of June, 2008

Commonwealth Land Title Insurance Co.
1700 Market Street - Suite 2110
Philadelphia, PA 19103

Between

Renee D. Slayton

(hereinafter called the Grantor),

AND

Rashia Slayton

(hereinafter called the Grantee),

Witnesseth That the said Grantor for and in consideration of the sum of lawful money of the United States of America, unto Grantor well and truly paid by the said Grantee and at or before the sealing and delivery hereof, the receipt whereof is hereby acknowledged, has granted, bargained and sold, released and confirmed, and by these presents does grant, bargain and sell, release and confirm unto the said Grantee and Grantee's heirs, successors and assigns,

\$1.00 (one Dollar)

ALL THAT CERTAIN lot or piece of ground with the buildings and improvements thereon erected, SITUATE on the Southeasterly side of Montana Street at the distance of Two hundred fifteen feet ten and one-quarter inches Northeastwardly from the Northeasterv side of Germantown Avenue in the Twenty-second Ward of

Description	Summary	Add All to My Images	
MORTGAGE 53345876	Rec. Date: 04/03/2018 01:03:24 PM Book Page: 51927617 Related: Rel Book Page: Num Pages: 11 Grantor: SLAYTON RASHIA, MIDFIRST BANK Grantee: MIDFIRST BANK, SLAYTON RASHIA Legal: 28 E MONTANA ST	View Image	Add to My Images
MORTGAGE 52981096	Rec. Date: 10/23/2015 01:27:00 PM Book Page: Rel Book Page: Num Pages: 6 Grantor: SLAYTON RASHIA Grantee: SECRETARY OF HOUSING AND URBAN DEVELOPMENT Legal: 28 E MONTANA ST	View Image	Add to My Images
ASSIGNMENT OF MORTGAGE 52944351	Rec. Date: 07/22/2015 02:26:00 PM Book Page: 51927617 Related: Rel Book Page: Num Pages: 4 Grantor: CITIMORTGAGE INC Grantee: MIDFIRST BANK Legal: 28 E MONTANA ST	View Image	Add to My Images
MORTGAGE 52716760	Rec. Date: 11/06/2013 12:58:00 PM Book Page: Rel Book Page: Num Pages: 7 Grantor: SLAYTON RASHIA Grantee: SECRETARY OF HOUSING AND URBAN DEVELOPMENT Legal: 28 E MONTANA ST	View Image	Add to My Images
MORTGAGE 52388927	Rec. Date: 09/09/2011 03:38:00 PM Book Page: Rel Book Page: Num Pages: 6 Grantor: SLAYTON RASHIA Grantee: SECRETARY OF	View Image	Add to My Images



2011	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2012	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2013	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2014	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2015	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2016	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2017	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2018	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2019	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2020	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2021	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00			
2022	\$1,364.81	\$0.00	\$0.00	\$0.00	\$1,364.81			
Total	\$1,364.81	\$0.00	\$0.00	\$0.00	\$1,364.81			

Processes Using This Form

Edit Fetch documents

Preview Form

Preview Saved Form in English

Form Elements

Enabled

▶ Instruction: When you press ... to arrive.

▾ Generic Outgoing API

API URL:

API Method:

POST content type:

Parameters to send

Source	Param name	Value
<input type="text" value="Literal value"/>	<input type="text" value="api"/>	<input type="text" value="wouldntyouliketoknow"/>
<input type="checkbox"/> Path parameter		
<input type="text" value="Address"/>	<input type="text" value="addr1"/>	<input type="text" value="Variable ###VALUE###"/>
<input type="checkbox"/> Path parameter		
<input type="text" value="Primary Advocate Email"/>	<input type="text" value="current_user"/>	<input type="text" value="Variable ###VALUE###"/>
<input type="checkbox"/> Path parameter		
<input type="text" value="Matter / Case Id"/>	<input type="text" value="id"/>	<input type="text" value="Variable ###VALUE###"/>
<input type="checkbox"/> Path parameter		
<input type="button" value="Add parameter"/>		

Use NYC data formatting

Dropbox REST API

API example:
Summarizing
information in a
case note

Philadelphia Legal Assistance

Add Case Notes

✓ Add Case Notes

0% Complete
Create PDF

Testy Tester
Case No: (22-0340830)

Case Email

Disposition: Open

Case Status: N/A

Date Open: 01/10/2022

Advocate: Jonathan Pyle

Case Summary

Contact Summary

Assignment Summary

[Go To Case Notes](#) | [Foreclosure Docket Info](#) | [Search CCP by name](#) | **Docket #:** [Add Litigation Entry](#)
[For This Docket Number](#) | [Fetch Documents for This Docket Number \(or address in case\)](#)

Continue »

Note

Note Type* Case Notes

Subject

Date Posted* 03/21/2022

Allow in E-Transfers?* Yes No

Body*

Philadelphia Legal Assistance

Note Drafts 31

Messages 0

MyTime 0 HOURS

Jonathan Pyle

Logout

- Home
- Cases
- Calendar
- Timekeeping
- Contacts
- Organizations
- Matters
- Report
- Help
- Admin

Home » Cases » Testy Tester (22-0340830) » Add Case Notes

Search Actions Views Admin Help Timer Not Started - 0:00

Add Case Notes

Add Case Notes

0% Complete
Create PDF

Testy Tester
Case No: (22-0340830)

Case Email

Disposition: Open

Case Status: N/A

Date Open: 01/10/2022

Advocate: Jonathan Pyle

Case Summary

Contact Summary

Assignment Summary

Go To Case Notes | Foreclosure Docket Info | Search CCP by name | Docket #: Add Litigation Entry
For This Docket Number | Fetch Documents for This Docket Number (or address in case)
Searching...

Continue »

Note

Note Type*

Case Notes

Subject

Date Posted*

03/21/2022

Allow in
E-Transfers?*

Yes No

Body*

Philadelphia Legal Assistance

📧 Note Drafts 29

📧 Messages 0

🕒 MyTime 0 HOURS

👤 Jonathan Pyle

🚪 Logout

- Home
- Cases**
- Calendar
- Timekeeping
- Contacts
- Organizations
- Matters
- Report
- Help
- Admin

Home » Cases » Testy Tester (22-0340830) » Add Case Notes

🔍 Search 📄 Actions 👁 Views 👤 Admin 🗨 Help 🕒 Timer Not Started - 0:00

Add Case Notes

👤 Add Case Notes

0% Complete
Create PDF

Testy Tester
Case No: (22-0340830) ▾

- Case Email
- Disposition: Open
- Case Status: N/A
- Date Open: 01/10/2022
- Advocate: Jonathan Pyle
- Case Summary
- Contact Summary
- Assignment Summary

[Go To Case Notes](#) |
 [Foreclosure Docket Info](#) |
 [Search CCP by name](#) |
 Docket #:
[Add Litigation Entry](#)
[For This Docket Number](#) |
 [Fetch Documents for This Docket Number \(or address in case\)](#)

Continue »

Note

Note Type*

Subject

Date Posted* 📅

Allow in E-Transfers?* Yes No

Body*

Possible Case ID: 141203393
 Case Caption: URBAN FINANCIAL OF AMERICA, LLC VS ALXANDRIA
 Plaintiff's Attorney: FOLEY, JOSEPH I with MCCABE

Add Case Notes

Add Case Notes

0% Complete
Create PDF

Testy Tester

Case No: (22-0340830)

Case Email

Disposition: Open

Case Status: N/A

Date Open: 01/10/2022

Advocate: Jonathan Pyle

Case Summary

Contact Summary

Assignment Summary

E-Transfers?*

Yes No

Body*

Possible Case ID: 141203393
Case Caption: URBAN FINANCIAL OF AMERICA, LLC VS ALXZANDRIA
Plaintiff's Attorney: FOLEY, JOSEPH I with MCCABE WEISBERG CONWAY LLC
Defendant's Name: CATHERINE ALXZANDRIA
Defendant's Address: 505 SOUTH 62ND STREET, PHILADELPHIA PA 19143
Complaint Filed: 12/23/2014, served on 01/02/2015 (according to affidavit of service filed on 01/09/2015)
Amount of Claim: \$55,386.25 = \$167.72/m (11.79%) at 2%, \$231.48/m (16.28%) at 4%, over 40 years
Latest Docket Entry: 03/26/2015 (PRAECIPE TO DISCONTINUE)
Other Docket Numbers: 220301262

Possible Case ID: 220301262
Case Caption: LAKEVIEW LOAN SERVICING, LLC VS DAVIS ETAL
Plaintiff's Attorney: BRADFORD, MICHELE M
Defendant's Name: UNKNOWN HEIRS DAVIS
Defendant's Address: 3129 NORTH 29TH STREET, PHILADELPHIA PA 19132
Complaint Filed: 03/11/2022
Amount of Claim: \$43,947.27 = \$133.08/m (9.36%) at 2%, \$183.67/m (12.92%) at 4%, over 40 years
Latest Docket Entry: 03/11/2022 (COMPLAINT FILED NOTICE GIVEN)
Other Docket Numbers: 141203393

Nearest HCAs: Asociacion Puertorriquenos en Marcha (1.7 miles), Center In The Park (2.3 miles),
Congreso de Latinos Unidos (2.4 miles)

Save Draft

Communication

Send this note as an email

Choose Recipients

API example: Phone system integration



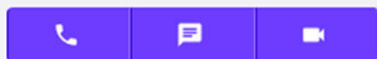
Search contacts and messages

CTRL + /



Jonathan Pyle | (215) 981-3843

No status



Inbox

Contacts

All channels

Departments

MAIN 119

SYHP 1000

Call Centers OFF DUTY

FLU 1

Front Desk 7

GIU Homeownership DND

GIU MISC DND

GIU Online Intake DND

GIU UC DND

SYHP ED 1000

SYHP Foreclosure 1000

SYHP RA 1000

Monitor all call centers

Recents

AT Alexandra Tucci

JP Jonathan Pyle

Apita Centee



Alexandra Tucci ★

Mobile: (215) 391-9686



Search

Your conversation with Alexandra will appear here.



Hi Alexandra, this is Jonathan from PLA. How did it go at court today?



Testy Tester

Case No: (22-0340830)

Case Email

Disposition: Open

Case Status: N/A

Date Open: 01/10/2022

Advocate: Jonathan Pyle

Case Summary

Contact Summary

Assignment Summary

Preferred Phone Home Phone

Ok to send texts? N/A

Opted in to text update service No

Text Update Service Subject N/A

Email

Send text message to client

CASE NOTES

CASE STATUS

DISPOSITION LOG

FUNDING CODE LOG

Add Case Note

Lookup Prime Advocate Numbers | Add Time Slip To This Case

Notes

Show Filters

From Jonathan Pyle to 215-391-9686 (Text message)

Posted on 03/21/2022 by API User - Edit - Delete/Transfer

Hi Alexandra, this is Jonathan from PLA. How did it go at court today?



Search contacts and messages

CTRL + /



Jonathan Pyle | (215) 981-3843

No status



Inbox

Contacts

All channels

Departments

MAIN 119

SYHP 1000

Call Centers OFF DUTY

FLU 1

Front Desk 8

GIU Homeownership DND

GIU MISC DND

GIU Online Intake DND

GIU UC DND

SYHP ED 1000

SYHP Foreclosure 1000

SYHP RA 1000

Monitor all call centers

Recents

Alexandra Tucci

Jonathan Pyle

Alexandra Tucci

Mobile: (215) 391-9686



Search

Today

Jonathan Pyle 10:38 AM
Hi Alexandra, this is Jonathan from PLA. How did it go at court today?

Alexandra Tucci 10:40 AM



Alexandra Tucci 10:40 AM
She gave me a temporary order.

New message



Testy Tester

Case No: (22-0340830)

Case Email

Disposition: Open

Case Status: N/A

Date Open: 01/10/2022

Advocate: Jonathan Pyle

Case Summary

Contact Summary

Assignment Summary

CASE NOTES CASE STATUS DISPOSITION LOG FUNDING CODE LOG

Add Case Note Lookup Prime Advocate Numbers | Add Time Slip To This Case

Notes

Show Filters

Email: From 215-391-9686 to Jonathan Pyle (General Notes)

Posted on 03/21/2022 by System User - Delete/Transfer

From: no-reply@philalegal.org

Documents Attached:

Name	Title	Size	Actions
<input type="checkbox"/> 22-0340830-1647873656.jpg	22-0340830-1647873656.jpg	257.67 kiB	Download

From 215-391-9686 to Jonathan Pyle (Text message)

Posted on 03/21/2022 by API User - Edit - Delete/Transfer

She gave me a temporary order.

API example:
Getting a link to a
pre-populated
docassemble
interview

Testy Tester

Case No: (22-0340830)

Case Email

Disposition: Open

Case Status: N/A

Date Open: 01/10/2022

Advocate: Jonathan Pyle

Case Summary

Contact Summary

Assignment Summary

Status	No Conflict
Adverse Party Conflict Status	No Conflict
Close Reason	N/A
Archive #	N/A
Physical file created	N/A
Primary Judge	N/A
Intake Census	N/A
Was this case electronically transferred?	No

Download case documents as a ZIP file

[Case Information PDF](#)

[Ask client to sign a document that you upload](#)

[Generate link to give to client to fill out specific forms](#)

AUTOMATED DOCUMENTS EMAIL TEMPLATES CASE DOCUMENTS

transferred?

Testy Tester

Case No: (22-0340830) ▾

Case Email

Disposition: Open

Case Status: N/A

Date Open: 01/10/2022

Advocate: Jonathan Pyle

Case Summary

Contact Summary

Assignment Summary

[Download case documents as a ZIP file](#)

[Case Information PDF](#)

[Ask client to sign a document that you upload](#)

[Generate link to give to client to fill out specific forms](#)

Obtain a retainer agreement and citizenship attestation

Dear Mr. Tester,

In order to proceed with your case, we need you to fill out some forms, which you can sign electronically by opening this link:

<https://sign.philalegal.org/goto?c=lejMEizeXpqncuYQSKRNUbrVoofnUEYz>

You can reply to this text message with photos of any documents (including most recent court order and pleadings) or evidence that you would like us to be able to look at during your intake. You may also text this number if you need to reschedule.

Thank you,

Obtain a citizenship attestation only

Dear Mr. Tester,

In order to proceed with your case, we need you to fill out a form that is required by our funder. You can fill out the form on-line using this link:

<https://sign.philalegal.org/goto?c=DaOefnQVaHJRcusBhRgAYTdYGPWichSg>

Thank you,

AUTOMATED DOCUMENTS

EMAIL TEMPLATES

CASE DOCUMENTS

Note: don't click the links in the **Document Title** column. Use the links in the **Download** column. If you want to add your own form letters here, talk to David Williams, x3845.

Agreement with Philadelphia Legal Assistance

Exit

Agreement with Philadelphia Legal Assistance

On the next screen, we will ask you if you agree to sign the Agreement with Philadelphia Legal Assistance and the Citizenship Attestation.

This is what the documents say:

AGREEMENT WITH PHILADELPHIA LEGAL ASSISTANCE

I, Testy Tester, and Philadelphia Legal Assistance ("PLA") agree that PLA will assist me with my problem concerning my family law matter. PLA will provide me with legal advice and limited legal assistance regarding my family law matter.

I acknowledge that PLA is under no obligation to, and nor do I expect its advocates to, accompany me to any legal proceeding (i.e. conference, hearing, trial, etc.). If a PLA consents to assist me at a conference or hearing, I acknowledge that PLA will sign a secondary representation retainer with me and is under no obligation to, and nor do I expect PLA to, represent or accompany me to any further proceedings.

I understand that PLA provides legal assistance using attorneys

Testy Tester

Case No: (22-0340830)

Case Email

Disposition: Open

Case Status: N/A

Date Open: 01/10/2022

Advocate: Jonathan Pyle

Case Summary

Contact Summary

Assignment Summary

Email: Agreement with Philadelphia Legal Assistance for Testy Tester (General Notes)


Posted on 03/21/2022 by System User - [Delete/Transfer](#)

From: Philadelphia Legal Assistance <no-reply@philalegal.org>

To: Jonathan Pyle <jpyle@philalegal.org>

The Agreement with Philadelphia Legal Assistance for Testy Tester is attached.

Documents Attached:


Name	Title	Size	Actions
 Retainer_and_CA_Testy_Tester.pdf	Retainer_and_CA_Testy_Tester.pdf	251.27 kiB	Download

Email: From 215-391-9686 to Jonathan Pyle (General Notes)

Posted on 03/21/2022 by System User - [Delete/Transfer](#)

From: no-reply@philalegal.org

Documents Attached:

Name	Title	Size	Actions
 22-0340830-1647873656.jpg	22-0340830-1647873656.jpg	257.67 kiB	Download

From 215-391-9686 to Jonathan Pyle (Text message)

Contact

Jonathan Pyle

Philadelphia Legal Assistance

718 Arch Street, Suite 300N

Philadelphia, PA 19106

jpyle@philalegal.org

215-981-3843



API Example: “Closed Loop” Referral System for MLPs

ALLUVION
HEALTH

NORTHWEST
CHC
Community Health Center

LS LegalServer

INConcertCare
expanding our capacity to care

IOWA
LEGAL
AID®
HOPE. DIGNITY. JUSTICE.

 AllianceChicago
Innovating for better health

 Siouxland
Community Health
an iowahealth⁺ center

 **MLSA**
Montana Legal Services Association

Pika Software

iowa PRIMARY CARE ASSOCIATION

PHC
primary health care

HCCN
Health Center Controlled Network

QVΣRA

National Center for Medical  Legal Partnership



Montana Primary Care Association

eClinicalWorks
"Improving Healthcare Together"





ELECTRONIC EXCHANGE OF DATA AND

“CLOSING THE LOOP”:

*Using the Electronic Health Record to
Make Medical-Legal Partnership Referrals,
Confirm Successful Connections, and
Receive Updates about Legal Outcomes.*

AN IOWA CASE STUDY

AUTHOR

MALLORY CURRAN, JD
Principal
Mallory Curran Consulting
Senior Advisor
National Center for Medical-Legal Partnership

DESIGNED BY

NISSI THAPA
Research Associate (Communications)
National Center for Medical-Legal Partnership

CONTACT

For more info about medical-legal
partnerships:
[National Center for Medical-Legal Partnership](https://www.nationalcenterformlp.org)
[medical-legalpartnership.org](https://www.medical-legalpartnership.org)
Twitter: National_MLP

PROJECT TEAM MEMBERS:

AllianceChicago, INConcertCare, Iowa Legal
Aid, Iowa Primary Care Association, Methodos
Technologies LLC, Montana Legal Services
Association, Qvera, and Siouxland Community Health
Center.

Introduction

For health centers seeking to “Close the Loop” on legal and social service referrals, automated processes within the electronic health record (EHR) and the electronic exchange of data with community partners are key tools in making, confirming, and getting updates about patient referrals.

Building the electronic exchange of data directly into the EHR is needed to reduce inefficiencies, document patient connection with available legal services, and track patient legal outcomes.

This Case Study provides a concrete example of how a medical-legal partnership (MLP) in Iowa set up electronic referrals in the EHR as well as the ability to “Close the Loop” via electronic updates from the legal partner. Those updates are delivered directly to the EHR and describe whether the patient connected with legal assistance and the legal outcomes of that assistance.

National Center for Medical  Legal Partnership
AT THE GEORGE WASHINGTON UNIVERSITY

Phase I: Screening for Unmet Legal Needs

Income & Insurance | Housing & Utilities | Per / Family Stability | Ed / Work / Other | Case Information

Legal Screening DOB: 07/23/1999 Patient Age: 22 Years Old

Income and Insurance

? Are your wages being garnished or do you have concerns about debts? Yes No

 Comment:

? Do you have any tax problems or have you received notices from Internal Revenue Services? Yes No

 Comment:

? Are you having trouble accessing health insurance benefits? Yes No

 Comment:

? Have you applied for and been denied any cash or nutrition benefits, or have existing benefits been reduced? Yes No

 Comment:

Income & Insurance | Housing & Utilities | Per / Family Stability | Ed / Work / Other | Case Information

Legal Screening DOB: 07/23/1999 Patient Age: 22 Years Old

Income and Insurance

? Are your wages being garnished or do you have concerns about debts? Yes No

Comment:

? Do you have any tax problems or have you received notices from Internal Revenue Services? Yes No

Comment:

? Are you having trouble accessing health insurance benefits? Yes No

Yes (08/09/2021) lost insurance since divorce, restaurant where she works does not offer any health benefits

? Have you applied for and been denied any cash or nutrition benefits, or... Yes No

Comment:

athenaPractice

Patients might describe these problem as: being denied health insurance; getting cut off health insurance; being denied a certain medication, medical procedure, or medical or behavioral health service; not being able to fill prescriptions; or having trouble accessing or paying for long-term care.

Areas of law include: Medicaid, Medicare, CHIP, employer-based health insurance, health exchange / Obamacare, and nursing homes / skilled nursing facilities.

OK

Income and Insurance

? Are your wages being garnished or do you have concerns about debts? Yes No

Bankruptcy Debt Collection Creditor Harassment Predatory Lending Practices (Not Mortgages)

Loans/Installment Purchases Unfair and Deceptive Sales Practices Unpaid or Underpaid Wage Claims

Comment:

? Do you have any tax problems or have you received notices from Internal Revenue Services? Yes No

Comment:

? Are you having trouble accessing health insurance benefits? Yes No

Comment:

? Have you applied for and been denied any cash or nutrition benefits, or have existing benefits been reduced? Yes No

Comment:

Millennium Health System

20500 NW Evergreen Pkwy Hillsboro, OR 97124
5035317000 Fax: 5035551212



HOPE. DIGNITY. JUSTICE.

Health and Law Integrated Care Project

Referral to Legal Aid

Phone: (844) ILA-WELL

Email: ilawell@iowalaw.org

Fax (Des Moines): (515) 244-4618

Fax (Sioux City): (712) 277-2554

Date: 01/10/2022

Referred by: David Faldmo, PA-C

Alliance, Evelyn	SSN:	Date of Birth: 07/23/1999
3305 Elk Avenue	Primary Language: English	Interpreter needed: <input type="radio"/> Yes <input checked="" type="radio"/> No
	Cell Phone Number: (712) 555-1111	Ok to call: <input checked="" type="radio"/> Yes <input type="radio"/> No
Sioux City, IA 51104	Alternate Phone Number:	Ok to call: <input type="radio"/> Yes <input type="radio"/> No

Presenting Legal Issue(s):

Category: Income and Insurance

Sub-Category: Medicaid, CHIP (Government Children's Health Insurance Program)

Comment: still unable to access and sign up for benefits, needs coverage for self and children

Opposing Party (for divorce, custody, guardianship, paternity, child support, etc.): divorce - John Doe

Additional Comment: history of domestic violence

Signature: _____ **Date:** 01/10/2022

Phase II: Making Referrals from the Electronic Health Record



Incoming Transfer #18788

Problem: 32

Primary Client

Name: Ted James Lasso

SSN: 0907

Address: 11257 Shawnee

Religion: New Kansas City, MO

55123

Phone: (513) 348-2093

Phone Alt:

DoB: 9/18/1975

Mr. Ted James Lasso

SSN: 0907

DoB: 9/18/1975

Phonetic Matches(1)

1. Ted

Lasser

SSN:

5200

177/1970

Accept from Holding Pen

CONFLICT Deny Case

Potential Conflict Email Supervisor

Opposing Parties

Conflict Check for Opposing Party

Date Received	Status	Case Link
	Accepted	Case Delete
	Accepted	Case Delete
	Accepted	Case Delete
	Accepted	Case Delete
	Accepted	Case Delete
	Accepted	Case Delete
	Accepted	Case Delete
	Accepted	Case Delete

Calendar

- Day View
- Week View
- Four Week View
- Advanced View
- New Calendar Entry
- New Tickle

Reports

- PCIP Activity Type F
- PCIP Annuity Recov
- PCIP Cases by Plan
- Case Role Report
 - Gets Names, SSN Case Numbers and Dates based on Name, Role, and Open Date
- Client Matters Close
- Closed Cases w/ Tickler (optionally other calendar entries)
- Daily Intake report
- Demographics Repo
- Docket Tickler Repo
- Duplicate Cases Repo
- Duplicate Homeless Repo
 - Shows all clients with a case paid for by ESG fund that have more than one case.
- Evaluation Statistics Repo
- Foreclosures Report

Case Note -

4/15/2021 | 0.00 hours | [Edit this record](#)

MLP Legal Screening and Referral Notes
Health Center: Siouxland Community Health

Referring Staff: Monick INCC Reese

Language: English

Primary Ins: Medicare Advantage AARP

Secondary Ins: United Heartland

Are your wages being garnished or do you have concerns about debts?: Yes

Are your wages being garnished or do you have concerns about debts - Comments: test - unpaid wage claims

Do you have other legal needs?: Yes

Do you have other legal needs - Comments: test- issue with civil rights

personal & family stability - civil rights: Civil Rights

personal & family stability: true

income & insurance - unpaid or underpaid wage claims: Unpaid or Underpaid Wage Claims

income & insurance: true

notFound: Written consent to share information with Iowa Legal Aid has been completed

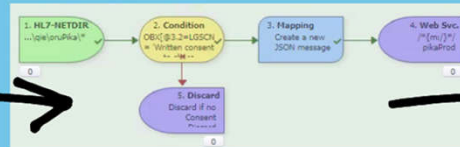
Are you having trouble accessing health insurance benefits - Comments: test - no issues with accessing health insurance

Phase III: Closing the Loop on Referrals

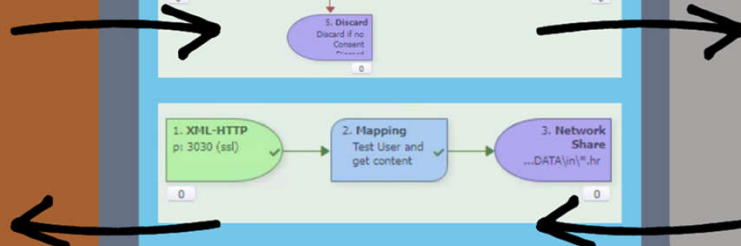
EHR database



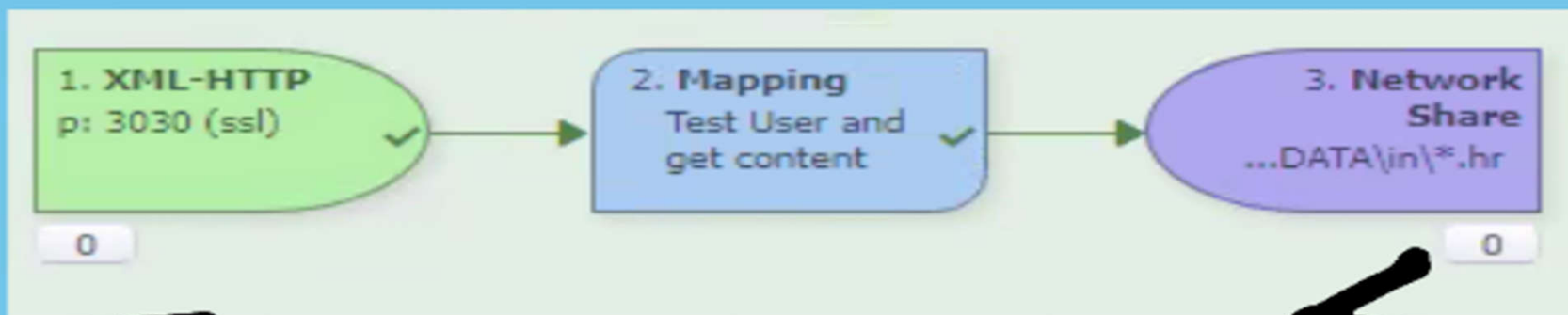
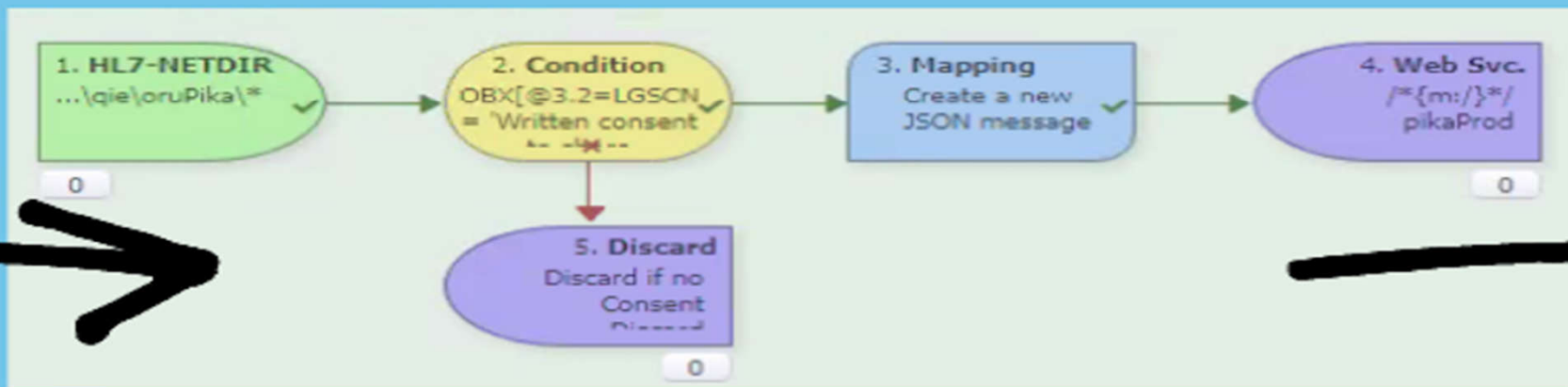
interface engine



legal aid database



interface engine



CLOSING MEDICAL-LEGAL PARTNERSHIP REPORT

%%[mlp_ref_partner]%%

Date submitted: %%[current_date]%%
 Submitted by: %%[logged_in_user]%%
 Client release: %%[mlp_partner_release]%%

Data Reported

#%%[number]%% Client: %%[client]%% MRN: %%[mlp_mrn]%% Client-Patient Relationship: %%[mlp_relationship]%% Financial Benefit: %%[mlp_provider_fin_ben]%% Medicaid Eligible Date: %%[mlp_medicaid_elig]%% Medicare Eligible Date: %%[mlp_medicare_elig]%% Private Insurance Eligible Date: %%[mlp_private_ins_elig]%% Self Pay Eligible Date: %%[mlp_selfpay_elig]%%	%%[problem_txt]%% %%[mlp_ihelp]%% Closed: %%[close_date]%% Level of Legal Service: %%[mlp_close_txt]%% Benefits: • %%[main_benefit_txt]%% • %%[add_benefit1_txt]%% • %%[add_benefit2_txt]%% Partner Output(s): %%[partner_output]%%
--	---

Case Summary:
 %%[mlp_medical_narrative]%%

CLOSING MEDICAL-LEGAL PARTNERSHIP REPORT

Siouxland Community Health

Date submitted: 3/1/2022
 Submitted by: Erin Planalp
 Client release: Yes

Data Reported

#22-00073 Client: Ted Lasso MRN: 42335 Client-Patient Relationship: Self Financial Benefit: Yes Medicaid Eligible Date: 4/1/2022 Medicare Eligible Date: Private Insurance Eligible Date: Self Pay Eligible Date:	51-Medicaid Income & Insurance Closed: 3/1/2022 Level of Legal Service: Full Representation Benefits: • 5101 – Obtained/retained Medicaid benefits • • Partner Output(s): • Investigated merits of case • Provided advice about legal problem • Appeared at administrative hearing
---	---

Case Summary:
 Successfully appealed Medicaid application denial.

History View

Chart <<

Documents for Edit (1)
 Ofc Visit:Adult Physi... Edit

New Document

Chart Summary
 Problems
 Medications ⚠
 Allergies
 Directives
 Alerts / Flags 1

Documents
 Flowsheet
 Orders
Histories
 Protocols 📄
 Graphs 📄
 Handouts 📄
 Registration 📄

Set Up Links ⚙

Chart Desktop

Chart

Chart Reports

Chart LinkLogic

Scheduling

Test
Patient ID: 149322
Home Location: BankCovi
MOBILE: [REDACTED]
WORK: [REDACTED]

47 Years Old Female (DOB: [REDACTED])
PCP: [REDACTED] MD
Language: English
Insurance: Medicare AARP Advantage - U

Histories

View: Alliance Legal Services 👤 Set Attached View 🔔 Alerts(1)/Flags(0)

Legal Screening

Date	Categories	Sub-Categories	Comments
08/13/2021	housing & utilities, education & employment, personal & family stability	Public Utilities	utility payments: ;daslkfj;asd
04/13/2021	income & insurance, personal & family stability	Unpaid or Underpaid Wage Claims, Unpaid or Underpaid Wage Claims, Domestic Abuse, Civil Rights	wages garnishes/debt concerns: test - unpaid wage claims, wages garnishes/debt concerns: TEST unpaid income and insurance, tax problems: TEST no issues with IRS, accessing health insurance benefits: test - no issues with accessing health insurance
04/13/2021	income & insurance, personal & family stability	Unpaid or Underpaid Wage Claims, Unpaid or Underpaid Wage Claims, Domestic Abuse, Civil Rights	wages garnishes/debt concerns: test - unpaid wage claims, wages garnishes/debt concerns: TEST unpaid income and insurance, tax problems: TEST no issues with IRS, accessing health insurance benefits: test - no issues with accessing health insurance

Case Information

Legal Case Number	Categories	Sub-Categories	Result of Referral	Date	Patient Relationship to Legal Client
21-00038	personal & family stability	95 - Wills and Estates	Intake completed & case accepted	04/09/2021	
21-00038	personal & family stability	95 - Wills and Estates	Intake completed & case accepted	04/09/2021	

Case Closure

Legal Case Number	Outcome	Level of Legal Service	Legal Case Summary	Date Legal Case Closed
21-00038	9502 95 Obtained a living will or health proxy or power of attorney	Brief Service	Completed a will for the patient.	2021-04-09



Resources

Insomnia - <https://insomnia.rest/products/insomnia>

Big List of Free APIs - <https://mixedanalytics.com/blog/list-actually-free-open-no-auth-needed-apis/>

LegalServer - <https://apidocs.legalserver.org/>

Thanks for joining us today!

Mallory Curran, Principal, Mallory Curran Consulting
mallory@mallorycurran.com

Jonathan Pyle, Contract Performance Officer, Philadelphia
Legal Assistance
jpyle@philalegal.org

Christopher Schwartz, Community Empowerment Advisor,
LegalServer
cschwartz@legalserver.org