

# Case Studies of Effective Tech Collaborations

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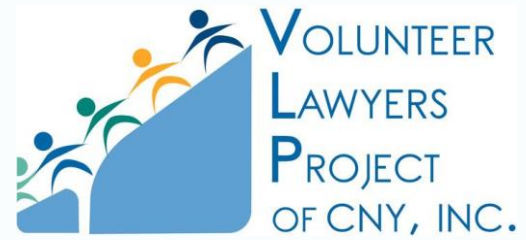
2023 Statewide Civil Legal Aid Technology Conference

# VLPCNY Shared Doc Access to Facilitate Urgent Client Services

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Sal Curran and Joseph Melo

# Technology Collaborations to Facilitate Urgent Client Services



TITLE

## Problem Presented

- 2 Immigration Legal Aid Groups with 3 attorneys in CNY already at capacity
- 3 Refugee Resettlement Agencies
- Over 500 Afghan Arrivals within 4 months

# Client Services Solutions

- 1: Mass recruitment and training of Volunteer Attorneys & Law Students
- 2: Training of Refugee Resettlement Agency staff on legal issues presented and how to help gather info on a case
- 3: Scheduling 8 all-day clinics with 8+ attorneys and 10+ law students with 20+/- client families, each needing an interpreter
- 4: Transferring Client Data from Refugee Resettlement Orgs to Legal Orgs
- 5: Assessing Client Needs & Following up



# Legal Details

4-Way  
Signed  
Client  
Release

MOUs  
Between  
Partner  
Agencies

- Home
- Sites
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- Deleted sites
- Policies
- Settings
- Content services
- Migration
- Reports
- Advanced

### Active sites

Use this page to sort and filter sites and change site settings.  
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3.99 TB available of 4.07 TB

+ Create   ↓ Export   ↶ Track view   Your recent actions   Search sites   All sites

Site name ↑	URL ↓	Teams ↓	Channel sites ↓	Storage used (GB) ↓	Primary admin ↓	Hub ↓	Template ↓	Last act
ImmigrationCCOC	.../sites/ImmigrationCCOC	-	-	0.89	Group owners	-	Team site	2/21/23
ImmigrationFW	.../sites/ImmigrationFW	-	-	0.52	Group owners	-	Team site	3/9/23
ImmigrationLegal	.../sites/ImmigrationLegal	1	-	2.69	Group owners	-	Team site	3/13/23
ImmigrationRISE	.../sites/ImmigrationRISE	-	-	0.06	Group owners	-	Team site	3/9/23
ImmigrationVolunteer	.../sites/ImmigrationVolunteer	-	-	1.76	Group owners	-	Team site	3/6/23

# ImmigrationCCOC

- General
- Activity
- Permissions
- Policies**

### External sharing

This site can be shared with existing guests only  
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### Sensitivity

None  
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## ImmigrationCCOC

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## Documents Library

[See all](#)[+ New](#) [Upload](#) [Edit in grid view](#) [Sync](#) [Export to Excel](#) [All Documents](#) [?](#)

	Name	Date of Clinic	Tin
	3-18-2022	3/18/2022	
	4-22-2022	4/22/2022	
	5-06-2022	5/06/2022	
	5-20-2022		
	Naturalization Review		
	ONA LEGAL CONSULTATION DAYS		
	TAX RETURN ISSUES		
	Afghan Legal Services Screening Clinic Intake.docx		
	Four Party Release of Information Form.docx		



## ImmigrationLegal

Home

Documents

Immigration Legal Plan

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Teams

Recycle bin

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Add shortcut to OneDrive

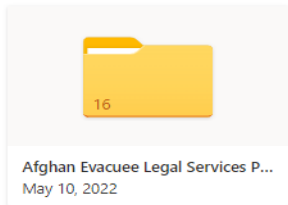
Pin to Quick access

Export to Excel

Automate

Print

## Documents



## &gt; In channels

## v In site library

Name	Modified	Modified By	Date	+ Add col
Afghan Evacuee Legal Services Project	May 10, 2022	Grace Sullivan		
CNY ONA LEGAL COUNSEL	April 28, 2022	Sara McDowell		
General	March 9, 2022	Sai Curran		
NORTH COUNTRY ONA LEGAL COUNSEL	April 28, 2022	Sara McDowell		
Pro Bono Volunteer Forms	May 10, 2022	Grace Sullivan		
TPS -- General	May 10, 2022	Grace Sullivan		
Ukrainian TPS Clinics	May 18, 2022	Grace Sullivan		



 EDIT LINKS

# People and Groups ▸ ImmigrationLegal Members

Groups

**ImmigrationLegal Members**

ImmigrationLegal Visitors

ImmigrationLegal Owners

More...

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Name

About Me



Anas Saleh



Anchal Saxena



Benjamin Vernon



Bomy Hwang



Cameron Dunbar



Emily Davies



Fahimeh Zaheri

Immigration Staff Attorney - ONA Legal Counsel of CNY



Grace Sullivan



Grace Zaiman



ImmigrationLegal Members



James P. Tracy



Jennifer Gavidondo



John Jeha



Joseph P Trojan



Kanalya Arivalagan



Lucy Saldana



Marisol Estrada Cruz



Naomi Godbey



Robert Trainor



Sara McDowell



Silvana Vergara



Home

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Documents

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Documents > Afghan Evacuee Legal Services Project

May 25, 2022 March 8 8 hours ago

Name	Modified	Modified By	Date
Afghan Legal Services Project Case Files	May 25, 2022	Grace Sullivan	
CLINIC FORMS	May 10, 2022	Grace Sullivan	
General	May 10, 2022	Grace Sullivan	
General1	May 27, 2022	Sara McDowell	
Pro Se Resources	May 10, 2022	Grace Sullivan	
Recurring Legal Issues	May 10, 2022	Grace Sullivan	
Resource Library (In Progress)	May 10, 2022	Grace Sullivan	
TPS for Afghans	May 19, 2022	Grace Sullivan	
Afghan Arrivals Needing Legal Screening.xlsx	July 12, 2022	Marisol Estrada Cruz	
Afghan Client Matching .xlsx	8 hours ago	Sara McDowell	
Afghan Military Units.xlsx	October 17, 2022	Marisol Estrada Cruz	
False Statement Questions.docx	October 7, 2022	Marisol Estrada Cruz	
Master List - Afghan Clinic Data Tracking.xlsx	March 8	Yuchen Cook	
Meetings Agenda VLP & HLAS.docx	October 6, 2022	Lizeth Ortega	
Other Afghan Clinic Data Tracking.xlsx	September 27, 2022	Lizeth Ortega	
RISE CASES UPDATE.xlsx	December 8, 2022	Sara McDowell	

# 500 Afghan Arrivals resulted in 174 individual cases to place

Excel Master List - Afghan Clinic Data Tracking - Saved

Search (Alt + Q)

File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Clipboard Font Alignment Number Conditional Formatting Styles Cells Editing Analysis

Consultation Date	Client Name	Resettlement Agency	Assisting Law Student	Consulting Attorney	Interpreter	Ethnic Background	Date of Entry	Women's Rights Activism	Consulting Agency	Legal Server File No.	Pro Bono Attorney/HLAS or VLP Attorney
3/18/2022	[REDACTED]	CYO	Megan Long	John Jaha	N/A	Tajik		No	HLAS	22-0089512	
3/18/2022	[REDACTED]	CYO	Megan Long	Lucero Saldana / Alyas Munib	N/A	Pashai	9/2/2021	NO	HLAS	22-0089508	
4/6/22	[REDACTED]	CYO	Grace Sullivan	Lucero Saldana / Alyas Munib	N/A	N/A		NO	HLAS	22-0089506	Michael Pitzer
3/18/2022	[REDACTED]	CYO	Marisol Cruz	Lucero Saldana / Alyas Munib	N/A	Tajik		No	HLAS	22-0089413	
3/18/2022	[REDACTED]	CYO	Giovanni Antonucci	Rebecca Cohen	Wionamimau	Tajik	12/15/2021	NO	VLP CNY	22-063229	Francisco Quesada
3/18/2022	[REDACTED]	CYO	Ana Sylvia Espinosa	Rebecca Cohen	Ali Akbar Modabber	Pashai	8/28/2021	NO	VLP CNY	22-063221	Tsui Yee
3/18/2022	[REDACTED]	CYO	Anchal Saxena	Sara McDowell	Najam Hackalzadah	N/A	9/1/2021	NO	VLP CNY	22-0063218	Mitch Katz
3/18/2022	[REDACTED]				Najam Hackalzadah						
3/18/2022	[REDACTED]	CYO	Anchal Saxena	Sara McDowell	N/A	9/1/2021	NO	VLP CNY	22-063216		Mitch Katz
3/25/2022	[REDACTED]	IFW	Colind Sommers	Bomy Hwang	Najman Halkalzadah	Uzbek	10/28/2021	NO	HLAS	22-0089688	Mark Curley
3/25/2022	[REDACTED]	IFW	Ahmed Al Shattawi	Bomy Hwang	Maria Kambez	Tajik		NO	HLAS	22-0089687	
3/25/2022	[REDACTED]	IFW	Emily Hildreth	Lucro Saldana / Beheshta Rasekh		Turkmen		Yes	HLAS	22-0089685	
3/25/2022	[REDACTED]	IFW	Marisol Cruz	Genevieve Katzberg	Nat and Maria	N/A		Yes	VLP CNY	22-0063336	Client Round 2
3/25/2022	[REDACTED]	IFW	Nimsy Garcia	James P Tracy Jr	N/A	Tajik	10/26/2021	NO	HLAS	22-0089686	Prof. Andrew Greenberg
3/25/2022	[REDACTED]	IFW	David Bonagurio	Lucro Saldana / Beheshta Rasekh	Wall	Turkmen	9/3/2021	NO	HLAS	22-0089683	Beheshta Rasekh
3/25/2022	[REDACTED]	IFW	Anchal Saxena	James P Tracy Jr	N/A	Rashidun		NO	HLAS	22-0089682	attorney in D
3/25/2022	[REDACTED]	IFW	Giovanni Antonucci	Lucro Saldana / Beheshta Rasekh	Hasebullah Ahmadi	Tajik	9/5/2021	NO	VLP CNY	22-0063338	Beheshta Rasekh
3/25/2022	[REDACTED]	IFW	Jennifer Gavidondo		Maria Kambez	Tajik			VLP CNY	22-0063336	Prof. Andrew Greenberg
3/24/2022	[REDACTED]	IFW	Solih	Lucro Saldana / Beheshta Rasekh	N/A	Rashidun		NO	HLAS	22-0089688	
3/25/2022	[REDACTED]	IFW	David Bonagurio	Lucro Saldana / Beheshta Rasekh	Sayed Eiyasusouji	Tajik	8/26/2021	NO	HLAS	22-0089609	Beheshta Rasekh

# Benefits

**Shared planning  
materials**

**Tracking Client  
Placements**

**Joint Grant  
Reporting**

**Sharing  
Resources**

**Highly Secure Environment**



# ImmigrationVolunteer

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### Add real-time chat

Add Microsoft Teams to collaborate in real-time and share resources across Microsoft 365 with your team.

[Add Microsoft Teams](#)

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Name

- Asylum 101 Materials
- Case Law
- Country Condition Reports
- Cuban Entrants
- Firm Resettlement
- Interview Prep
- Law Review Articles
- Post Asylum Approval
- Preparing Form I-589, Affidavit, and Supporting Documents
- Removal Defense
- Sample Asylum Application Submissions
- SIS
- Terrorism-Related Inadmissibility Grounds (TRIG)
- TPS for Afghans
- Trauma Informed Advocacy
- USCIS Officer Training Material
- Work Permit While Awaiting an Asylum Decision
- Working with interpreter

# ONAUpstateProBono

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Documents > Reporting > QUARTER 1 2022-2023

Name

- ECBAVLP
- JustCause
- Legal Aid Society of Rochester
- Reporting Templates
- VLPCNY
- LOG OF OUTREACH.xlsx
- LOG OF TRAININGS.xlsx
- WEBINARS ATTENDED BY GRANTEE STAFF - Copy.docx



# CONTACT

# Sal Curran

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## Website

[www.vlpcny.com](http://www.vlpcny.com)

# Maryland Coordinated Intake

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Sarah John and Lezlie Paulus



# CIVIL JUSTICE

## Case Studies of Effective Tech Collaborations: Maryland Coordinated Intake

—● [civiljusticeinc.org](http://civiljusticeinc.org) ●—

## Maryland Access to Counsel in Evictions

# Coordinated Intake System

Efficiently connecting people facing eviction with free legal counsel



## Overwhelming need

Maryland is an outlier for eviction filings: Filing rate of ~70% in 2018



## Specific eligibility requirements

Legislation that sets up free counsel for particular case types in particular jurisdictions



## Highly specialized providers

Providers who serve specific populations or specialize in particular case types



Addressing the overwhelming need

# A2J Tech – CJ – 211 Partnership

Melding the efficiencies of tech with the expertise of a legal service provider and the ubiquity of 211 (United Way of Central Maryland)



- Develops and maintains CIS architecture and technology



United Way  
of Central Maryland

- Screens and interviews tenants
- Connects tenants to the best LSO and other services



- Works directly with stakeholders
- The source of legal expertise/ reviews difficult cases

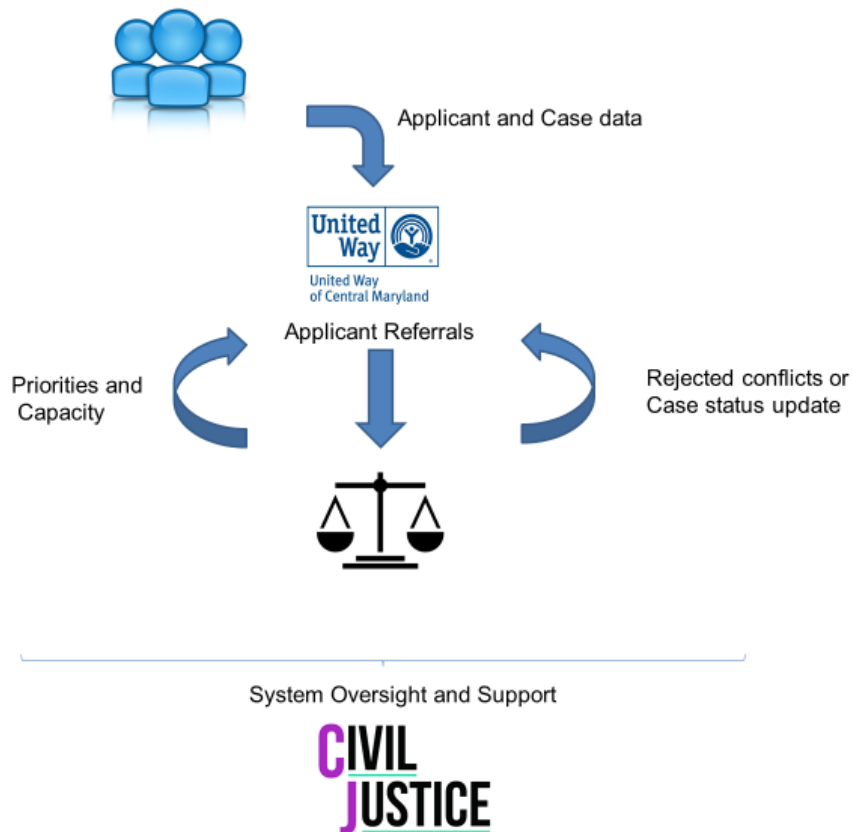


Using Technology to Support Access to  
Counsel for Evictions

# Supporting Systems and People

Building specialized technology to get eligible applicants to the provider  
most likely to serve them as quickly and easily as possible.

## Technology Requirements and Challenges





Dealing with specificity and specialization

# Coordinated Intake System

Guided Interview with Conditional Logic

Lease is ongoing/active



What is/was your current rent per month?

\$

Does your landlord claim you are behind on rent payments?

No



Yes

No

Have you received any paperwork, documents, emails, notices or summons from your landlord or the court?

Select...



Have you received any paperwork, documents, emails, notices or summons from your landlord or the court?

Select...



✓ Save



Dealing with specificity and specialization

# Coordinated Intake System

Legal Service Provider Database with Live Updates

## ACE/RTC Capacity

Currently accepting ACE/RTC cases in this jurisdiction

Is your organization currently accepting new ACE/RTC referrals in this jurisdiction?

Yes ✕ ▼

Yes

No

How many experienced ACE/RTC attorneys are currently working ACE/RTC cases in this jurisdiction? By "experienced attorneys," we mean attorneys who need little oversight or supervision and rarely need assistance from more experienced LL/T attorneys on their caseload of ACE/RTC-eligible cases.

5.5

How many ACE/RTC attorneys in-training are currently working ACE/RTC cases in this jurisdiction? By "attorneys in-training," we mean attorneys who require oversight or supervision and often need assistance from more experienced LL/T attorneys on their caseload of ACE/RTC-eligible cases.

2.1

Interpretation Service

Does your organization participate in Language Line or other interpretation service?

Yes ✕ ▼

## Case Type Preferences

Indicate which of these ACE/RTC case types your organization accepts and prioritizes in this jurisdiction. These data will be used to send you cases that best fit your expertise.

Failure to pay rent, 10-day notice only

Will not accept ✕ ▼

Failure to pay rent, court date scheduled

Will accept ✕ ▼

Tenant holding over

Will accept ✕ ▼

Tenant holding over, complex or policy case

Will accept ✕ ▼

Breach of lease

Will accept ✕ ▼

Breach of lease, complex or policy case

Will accept ✕ ▼



## Project Status

# Coordinated Intake System



May 2023

Soft launch in Baltimore City  
Testing and refining the system



October 2023

Official launch in Baltimore City



2024 and 2025

Expansion to the rest of Maryland

# Presenters

Sal Curran

*Executive Director, Volunteer Lawyers Project of CNY, Inc.*

Joseph Melo

*Director of Engineering, Just-Tech*

Sarah John

*Program Manager, ACE Coordinated Intake System, Civil Justice, Inc.*

Lezlie Paulus

*Intake Project Manager, A2J Tech*



# Moderators

Libby Vazquez

*Director of Legal Services, City Bar Justice Center*

Christopher Schwartz

*Community Empowerment Advisor, LegalServer*