

How-To-Guide For Roster Lawyers: **Client Gateway Forms (“Online Forms”)**

Legal Aid is focused on adding and enhancing the ways our clients interact with our Contact Centre. In many cases, making the phone call to the Contact Centre may not be feasible for our clients. We appreciate you being willing to pass basic client information forward to the Contact Centre so the client doesn't have to tell their story twice!

When do I use this form?

- Criminal charges only
- In or out of custody clients
- In any location (and you can forward information for all charges)

When working as Duty Counsel it's important to ask (or find out) from the client if they are an EXISTING client of LAA.

- If they are an already eligible client, LAA has an easier time processing the client's application through this method.

When working as Current Counsel:

- If they are a client with an existing certificate, breaches should still be requested through an authorization request

If this is a new client to LAA – please encourage them to call 1-866-845-3425 instead as they will need to provide more information than provided by this form.

You will find the form here:

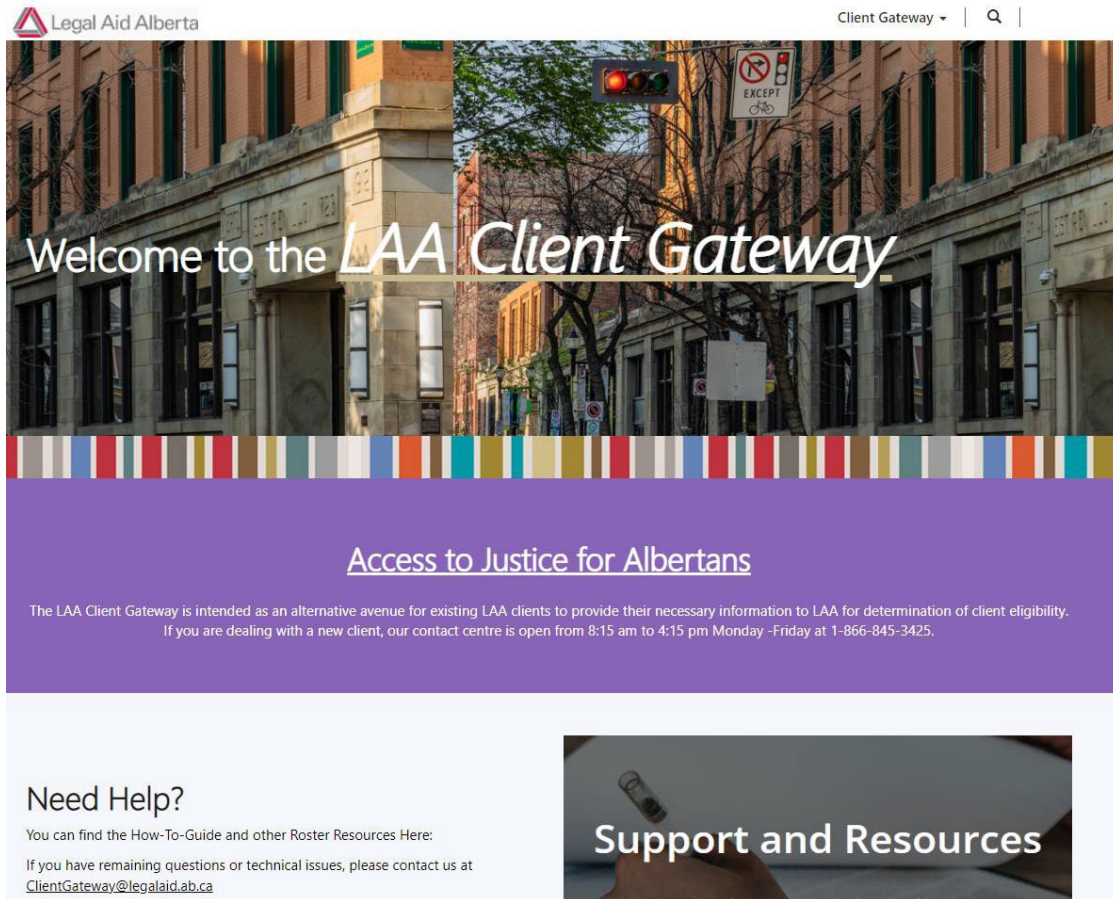
Client Gateway (<https://laaportal.powerappsportals.com/client-gateway/>)

If you have any concerns or questions with the form itself, or have an urgent technical issue, please email ClientGateway@legalaid.ab.ca to get ahold of the Operations Team.

➤ **STEP 1:**

Go to the Client Gateway Landing Page here: [Client Gateway · Custom Portal](#)

You will land here:



➤ **STEP 2:**

Click on “Sign In” in the top right corner and sign in with your legal aid credentials

- Username: [first initial and last name]@legalaid.ab.ca
- e.g., John Smith’s username is likely jsmith@legalaid.ab.ca



Is this your first log in? Find information on Multifactor Authentication [here](#).

➤ **STEP 3:**

Click on “Client Gateway” at the top of the page and select the “Roster Form” as below:



You are now in the online form. These steps will take you through the fields to be entered one by one.

When in Court Remember to Ask: “Are you an existing client?” before continuing with the Form!

You can ask “do you have active coverage?” or “have you applied for LAA in the last 2 years?”

- If the client is not sure, they will need to contact LAA at 1-866-845-3425 to complete their application.

➤ STEP 4:

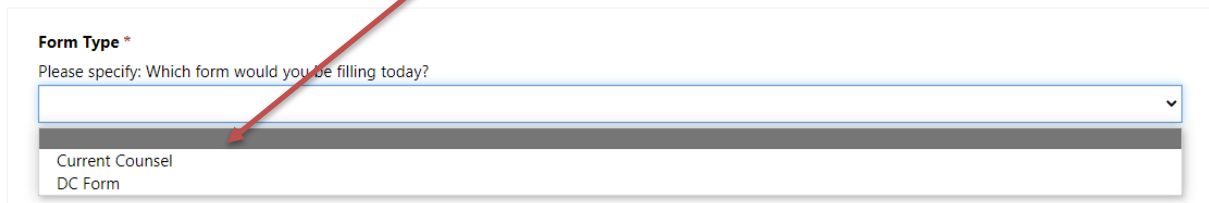
Please select the form type, whether you are currently working an “DC” shift or are a client’s “current counsel” by selecting the Form Type (first field on the form).

Roster Form

Please remember that the Client needs to have an existing active file with LAA. If it is a new client, or the client does not know if they have an active file, please have them call our Contact Centre at 1-866-845-3425.

Please ensure you record either a phone number and an email for the client so LAA can get in touch with the Client if needed.

If you experience issues with the form please contact ClientGateway@legalaid.ab.ca



Form Type *
Please specify: Which form would you be filling today?

Current Counsel
DC Form

➤ STEP 5 (current counsel only):

If you selected current counsel review and confirm the below with the client:

I confirm that I am making this request with the consent of my existing client as described below. We understand LAA financial and service eligibility rules must still be met before coverage will be provided. Requests for additional coverage of new charges or matters continue to be subject to LAA Policies and Rules including LAA's Travel Policy. Please ensure you provide the client's updated contact information (phone/email) in the event that the Client's eligibility must be confirmed by our Contact Centre Team. *

☒ No ☐ Yes

Add in one of your client's active certificate numbers here:

Active Certificate Number *

➤ STEP 6:

Confirm your name is entered here:

Counsel Name *

DCRoster Test

➤ STEP 7:

There are three main points that the Client needs to understand and confirm they consent before you can check “yes”. You can use the below as a script if you like:

“Before I can complete this form, I need to tell you:

1. **Privacy:** the information you provide in this application may be shared within LAA and your lawyer to assist in finding you a lawyer
2. **Preferred Counsel:** You can give me up to two names of lawyers you would like LAA to assign to your case and LAA will try and coordinate with those lawyers
3. **Payment:** LAA is not a free service and you will have to establish a flexible monthly payment plan with LAA.

Do you understand?”

If you encounter unusual circumstances – such as clients asking complex questions about eligibility, or clients who do not seem to understand the above – you should direct them to contact LAA through the main line to avoid any issues.

This is meant to be a way for current LAA clients to pass their information forward to get new criminal charges covered quickly and effortlessly (without the need to call). **We are not expecting you to become an Intake Officer and we are not expecting you to have to argue LAA policy with clients.** If that happens, please direct them to call and make their application through the traditional phone method.

You can also find these 3 points that need to be covered within the online form themselves – and you can just use that text as your script and review it while you are completing the form.

I confirm that I have provided the following information to this Client:

(1) Legal Aid is not a free service and you will be expected to establish a monthly payment plan if you do not have one set up already.

(2) The personal information you provide on this form may be shared within Legal Aid, including the Staff Duty Counsel Team, and with your preferred or appointed Counsel.

Does the Client Understand and Consent? *

☒ No ☐ Yes



When the client indicates they understand, you can click “yes”. If they indicate “no”, please have them call the main line.

➤ STEP 8:

Fill out the Client Information: First Name, Last Name, Birthdate

First Name *

Last Name *

Date Of Birth *



It is very important that you try and get a phone number OR an email from the client and put in the required fields. If no contact information is provided, LAA may not be able to complete the application process.

Can you provide the Client's CURRENT contact information below:

(Reminder: providing an email or phone number will help ensure that the client's application does not stall due to missing information on their client profile) *

☐ No ☒ Yes

Phone Number *

Email *

Address

City

Contact Notes

You can also add in a comment about their contact information (ex. Mom's cellphone number)

➤ STEP 9:

LAA respects a client's Choice of Counsel. For that reason, it is important you have advised the client that they can provide names of preferred lawyers if they wish. In the alternative, they can "waive" their Choice of Counsel. Preferred Counsel was discussed in Step 5 as well.

I confirm that I have explained to this Client that they can provide me with the names of up to three lawyers to choose as their Preferred Counsel if LAA approves coverage on this matter.
Does Client have Preferred Counsel?
☒ No ☐ Yes

If the client has Preferred Counsel, please check "yes" and an open text box will open so that you can capture the name (don't worry about spelling).

I confirm that I have explained to this Client that they can provide me with the names of up to three lawyers to choose as their Preferred Counsel if LAA approves coverage on this matter.
Does Client have Preferred Counsel?
☐ No ☒ Yes

Preferred Counsel *

If you and the client are happy to continue working together (and you attend the court location where the new charges are located), put your own name in the field.

➤ STEP 10:

LAA has started a new initiative to ask clients if they self-identify as Indigenous. This allows for LAA to better understand client's legal needs and our ability to provide appropriate services.

Do you self-identify as Indigenous?

Proper identification allows LAA to better understand client legal need and our ability to provide appropriate services.

Yes

No

Declined to answer

The only information required is Yes, No or Declined to Answer. No further information on their ancestry is required.

➤ STEP 11:

Is the client in or out of custody (or being held in custody on other charges)?

If yes, a “Custody Location” box will appear and you can select or search for their custody location.

In Custody?

☐ No ☒ Yes

Custody Location *

Bowden Institution

Calgary Correctional Centre

Calgary Correctional Centre- Spy Hill

Calgary Remand Centre

Calgary Young Offender Centre

Canada Border Service Agency

Drumheller Institution

Edmonton Institution

Edmonton Institution for Women

Edmonton Remand Centre

Edmonton Youth Offender Centre

Fort Saskatchewan Correctional Centre

Grande Cache Correctional Centre

Lethbridge Correctional Centre

Medicine Hat Remand Centre

Peace River Correctional Centre

RCMP Cells

Red Deer Remand Centre

➤ **STEP 12:**

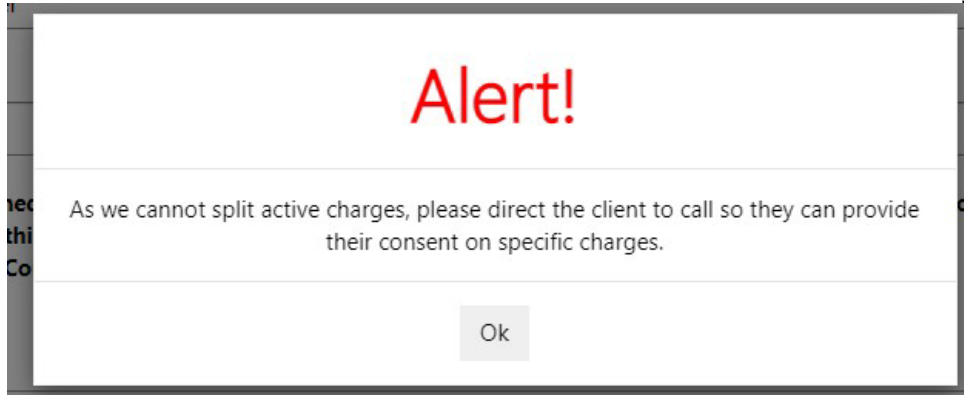
Does the client want help on all outstanding charges? The default answer is yes.

Help Needed On All Active Charges?

☐ No ☒ Yes

You can also assist the client by selecting multiple locations where they may have active charges – which is discussed below.

If the client does not want LAA help on all active issues, then you can select “no” and you will see the following pop up:



➤ STEP 13:

Provide some basic charge information & select ALL LOCATIONS where the client has active charges (that you know of).

Next Court Date

M/D/YYYY



Docket Number

Court Location

Select or search options



Courtroom

General Comments

Just provide the soonest court date and one docket number (this is just to use for validating the right client in JOIN).

You do not need to enter all docket numbers for every location as the Intake Officer will check JOIN and ensure all Active Charges in every location are processed for coverage.

It is extremely helpful (to make sure charges aren't missed) that all active court locations are selected. But if you don't know – don't worry. Simply select the Court Location you know of!

You can select multiple locations:



Court Location

Airdrie × Alexis First Nation × Athabasca ×

Select or search options

Select all 108 items

✓ Alexis First Nation

✓ Athabasca

Barrhead

Bassano Hospital

[generate a new image](#)

You can also add in any general comments you have about the client (ex. Being moved to ERC, has charges at warrant, providing an information breaches stem from.)

➤ STEP 14:

Hit Submit!

What Happens After I submit?

The form will be provided to Intake Staff who will process the application – based on urgency (I.e., upcoming court date).

*****There is a processing time of at least 24 hours from submission of the form to the client file moving to the next step*****

The intake staff will complete their usual steps when assisting a client to make an application:

1. Ensure all contact information is entered and up to date, including phone number and at least email (remember that when a lawyer is appointed, an email is sent to the client automatically).
 - a. Including updating preferred counsel.
2. Ensure financial information has been collected in the past 2 years:
 - a. If financially eligible, move to next step.
 - b. Intake staff will reach out to clients where financial information has not been received in the past 2 years to ensure that the application does not “dead end”
3. Check JOIN to confirm the details of the matter the client needs coverage on:
 - a. Ensure all dockets are included as requested;
 - b. Confirm next court date for appointing purposes.
4. If there are no issues with the application, the client’s matter will proceed to the next step:
 - a. If Likelihood of Imprisonment (LOI) needs to be confirmed, the matter will enter

the DC Triage process to be assessed by a staff DC.

- b. If the matter is indictable, or LOI has been confirmed, the matter will enter the appointing queue for an offer to be sent to the preferred lawyer (or whomever if no preferred counsel is chosen).

If there are issues with the application submitted:

- You can contact ClientGateway@legalaid.ab.ca for questions on submitted applications or for technical or procedural questions.
- If the client's financials are over 2 years old – they will have to call LAA.
- If the client is ineligible – an email is sent to the client advising of the same.

Multifactor Authentication (MFA)

When will it happen?

- Beginning on November 7th, 2022, all accounts accessing the Client Gateway application will be prompted to register for MFA when connecting to Microsoft online resources.

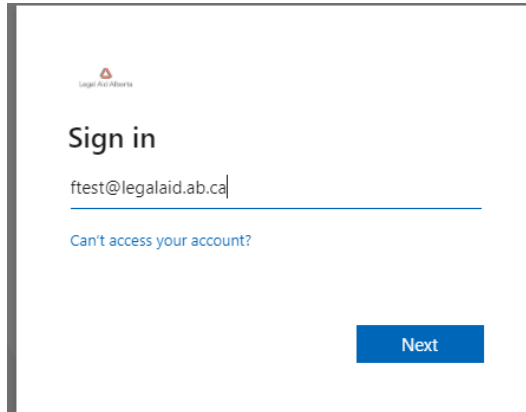
Why is this happening?

- Compromised passwords are one of the most common ways bad guys can get at our data.
- Multi-factor authentication is a key step to reduce the likelihood of LAA systems becoming compromised.

➤ Step 1:

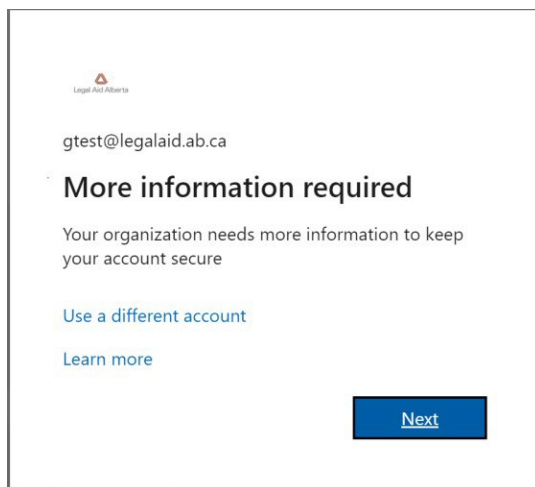
Go to the Client Gateway page and select Sign In at the top right of the screen. Microsoft Edge is the recommended browser. [Client Gateway · Custom Portal \(powerappsportals.com\)](https://powerappsportals.com).

- It should redirect you to the Microsoft Login Page
- Enter your Legal Aid Alberta **full username**. This is called a UPN and looks like an email address.
Example - msmith@legalaid.ab.ca



➤ **Step 2:**

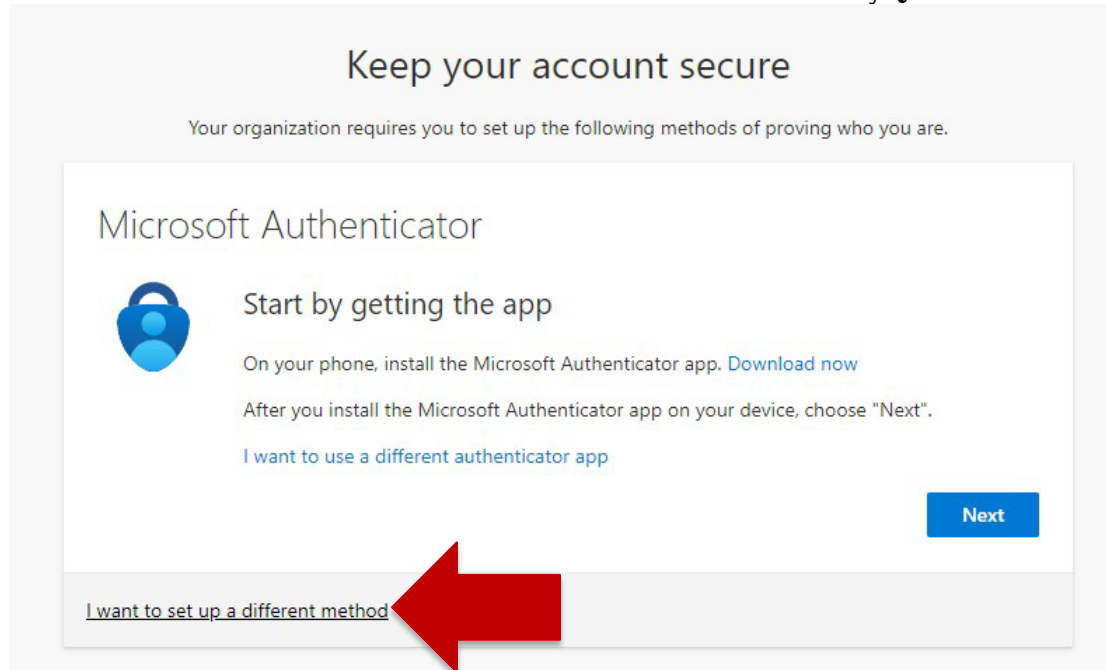
After Clicking Next, enter your Legal Aid Alberta password and you will next be told that “More Information Required”. This is looking for Multifactor Authentication (MFA).



- Click Next and it will redirect you to MFA registration (mysignins.microsoft.com)
- You will be asked to setup MFA by using the Authenticator app or via text/call to your mobile device.

➤ **Step 3:**


If you have or want to setup the Authenticator App, click Next and follow the prompts. If you want to have MFA codes text or called to your phone, click on “I want to set up a different method”. In the following steps, we will have a code texted to the phone.



Keep your account secure

Your organization requires you to set up the following methods of proving who you are.

Microsoft Authenticator



Start by getting the app

On your phone, install the Microsoft Authenticator app. [Download now](#)

After you install the Microsoft Authenticator app on your device, choose "Next".

[I want to use a different authenticator app](#)

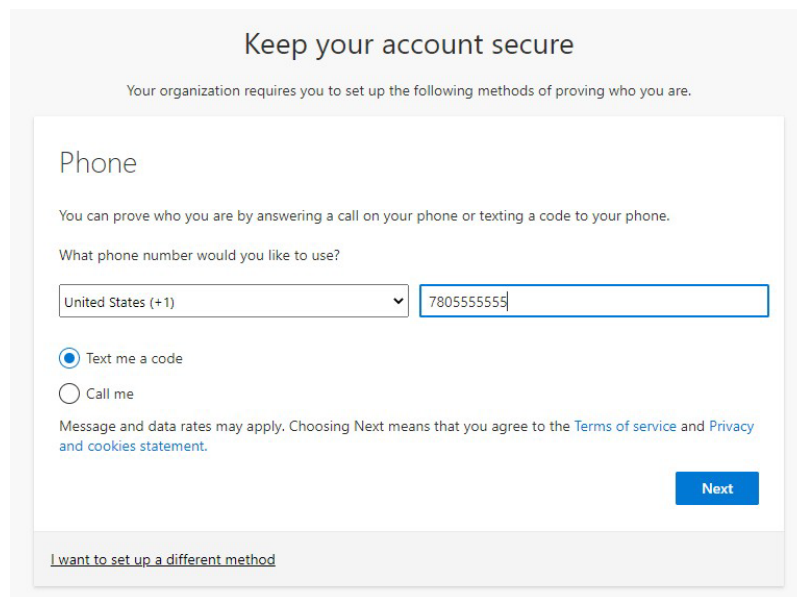
[Next](#)

[I want to set up a different method](#)

- Under "Choose a different method, select Phone

➤ **Step 4:**

On the next screen, provide your mobile phone number. Again, you can choose to have a code texted or it can call you. When you click next, you'll get that text or call providing the code.



Keep your account secure

Your organization requires you to set up the following methods of proving who you are.

Phone

You can prove who you are by answering a call on your phone or texting a code to your phone.

What phone number would you like to use?

United States (+1)

☒ Text me a code
☐ Call me

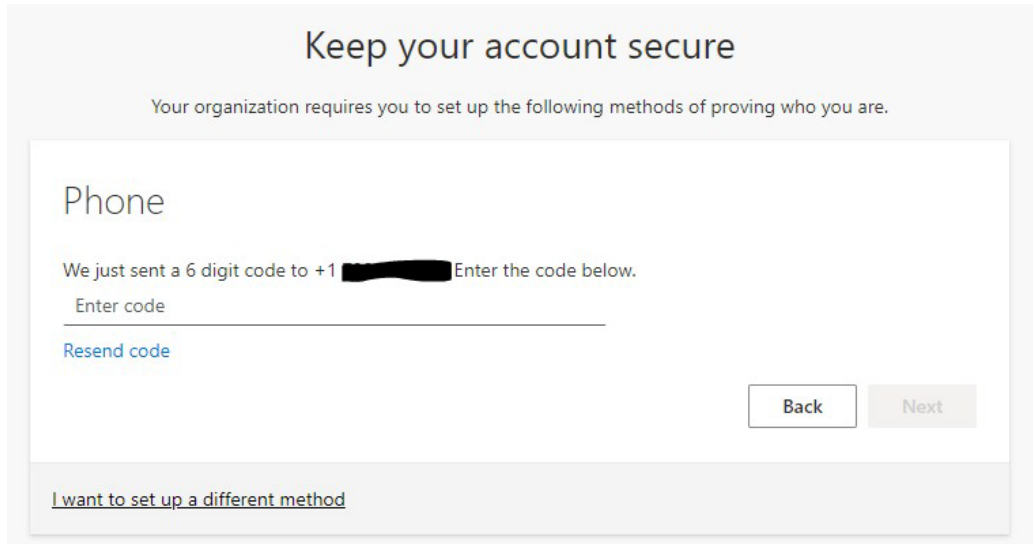
Message and data rates may apply. Choosing Next means that you agree to the [Terms of service](#) and [Privacy and cookies statement](#).

[Next](#)

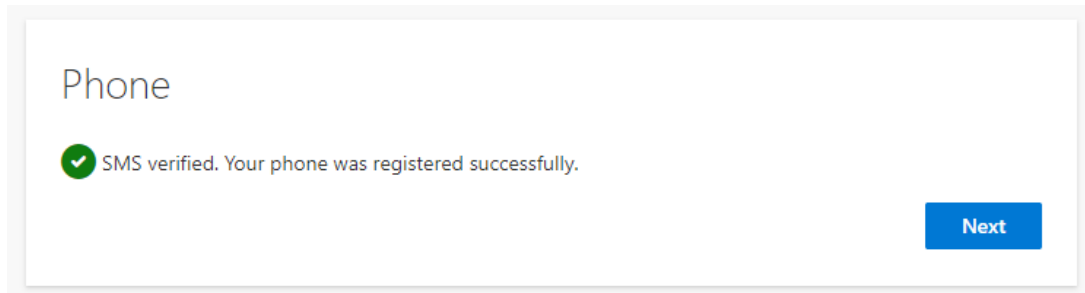
[I want to set up a different method](#)

➤ **Step 5:**

Enter the code you received into the form and click next.



- You will get a message that you have registered successfully. Click next and you will be redirected back to the Client Gateway page where you will be signed in.



This process will be required ever 90 days.

Reference Information on Multifactor Authentication

- Microsoft Article on setting up MFA
 - [Set up your Microsoft 365 sign-in for multi-factor authentication - Office Support](#)
- MFA options include the Microsoft Authenticator App (preferred), SMS text message, or phone call (including land lines).
- You can also use this link to register: <http://aka.ms/mfasetup>