

LAA Portal & Client Gateway Guide:

Agencies



Client Gateway Overview

The Client Gateway is a secure online portal that allows lawyers, LAA partners, and stakeholders to help new and existing clients facing criminal charges by filling out an online form in just a few minutes. The result is reduced client delays and a better experience overall.

Client Gateway forms are submitted via the LAA Portal.

When to submit a Gateway Form

Gateway forms should be submitted in the following situations:

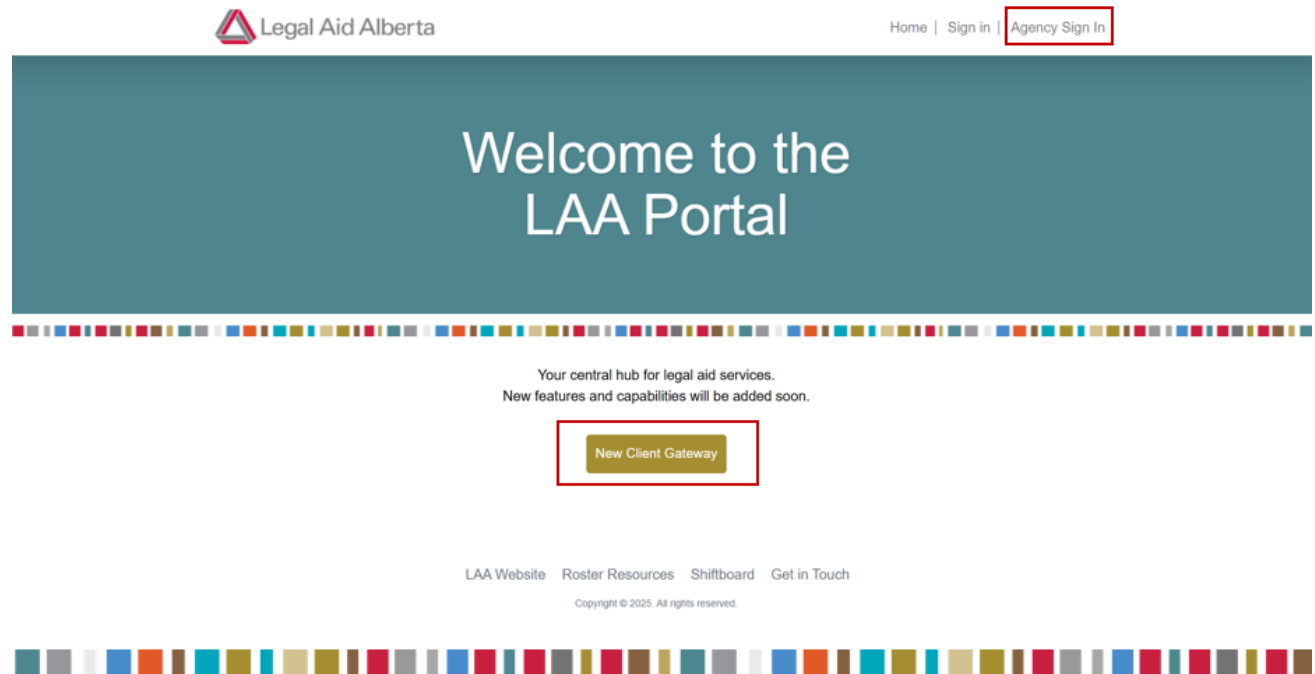
- New clients with a potentially service eligible legal issue.
- Existing clients who have not yet applied for their legal issue.
- Clients with Criminal, Child Welfare, Family, Immigration, or Independent Counsel for a Child.

Note: Please only fill out a form if you believe the client may be eligible for LAA and you are not able to assist them. If the client reports their income to be significantly over the guidelines (ie. Family size of 1 and makes \$70,000/year, please do not submit the form, and refer clients to other supports as appropriate).

LAA Portal Navigation

Accessing LAA Portal

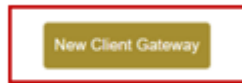
The LAA Portal can be accessed via this [link](#).



1. Click **Agency Sign In** at the top right-hand corner
2. A sign-in window will appear. Sign in with your login:

A screenshot of the LAA Portal sign-in window. It features the Legal Aid Alberta logo at the top. Below the logo is the text 'Sign in' and 'Sign in with your email address'. There are two input fields: 'Email Address' and 'Password'. Below the password field is a link that says 'Forgot your password?'. At the bottom is a blue button labeled 'Sign in'.

3. Once signed in, you can start a new Client Gateway form by clicking the New Client Gateway button on the landing page.

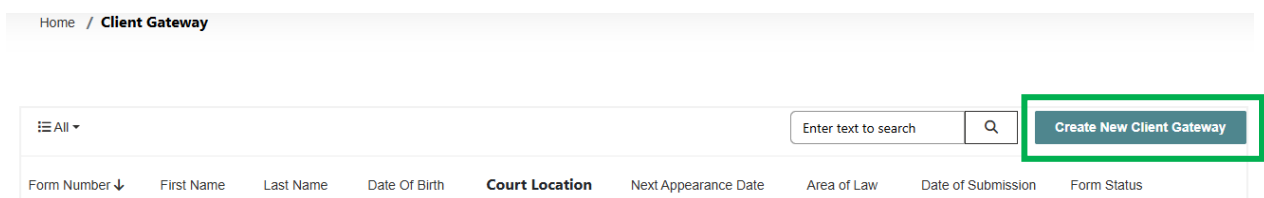


4. You can view all Gateway forms you submitted by clicking **Client Gateway** at the top right.



Home **Client Gateway** Megan Phillips ▾

5. From here, you can also create a new Gateway form by clicking **Create new Client Gateway**.



Client Information

Upon creating a new Gateway Form, the Client Information section will appear.

If a previous form requires an update, select "Yes" for "**Is this an update to an existing application?**"

- Updates could include names of preferred lawyers, court dates, docket numbers, or any additional information that should be passed along to the contact centre.



Client Information

Is this an update to an existing application?

☐ No

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.
- (3) If the client's matter needs to be reviewed for service eligibility and further information is needed, LAA will contact the client.

Does the Client Understand and Consent? *

☐ No

First Name *

Last Name *

Date Of Birth *

M/D/YYYY



Phone Number *

Email *

Contact Notes

Does Client self-identify as indigenous?

Select



In Custody?

☐ No

Does the client understand and Consent?

The consent section of the form functions to ensure the client is fully aware of LAA's policies regarding Payments, Privacy, and next steps.

The client must consent to these 3 terms for the form to be submitted. If they do not consent, provide further information as applicable, and advise the client to call in to apply if necessary.

Note: The same terms and conditions will be expected of them if they call to complete an application as well.

Contact Information

Fill out the contact information as applicable including:

- First Name
- Last Name
- Phone Number
- Email Address
- Contact Notes (if needed)
 - This field can be used to provide any further context you may feel will be useful for the Contact Centre to know (ie. Client lives at a shelter, client is in a treatment centre/hospital, etc.)

- Does Client self-identify as Indigenous
 - Ask the client and select Yes, No, or Declined to Answer as applicable.
- In Custody?
 - If the client is in custody, toggle to "yes" and input their Custody Location and ORCA Number (if they know it)
 - If client is not in custody, toggle to "no"

Note: It is highly recommended to gather both a phone number **and** email address whenever possible to ensure the Contact Centre can reach out to the client if needed. Please note that the address field has been removed for the forms as LAA communicates with clients via email address and phone only.

Financial Information

The next section is Financial Information; a key aspect to a client's eligibility for services at LAA.

Financial Eligibility Guidelines

Our financial eligibility guidelines scale depending on the client's family size.

Financial Guidelines

We can help you if your net household income is less than the amounts below*:


Family Size	1	2	3	4	5	6+
Monthly Income (Last 30 Days)	\$2,112	\$2,615	\$3,721	\$4,023	\$4,325	\$4,627
Annual Income	\$25,346	\$31,381	\$44,656	\$48,276	\$51,898	\$55,518

*\$25,346 net annual income for a family size of one = \$30,000 gross annual income

In addition to income guidelines, clients must have also have **under \$120,000** of equity in their assets.

***AISH recipients are an exception to these income guidelines but will only qualify if they also have under \$120,000 of equity in assets.**

Financial Information is not always required, ensure to determine if it is required and toggle the **"Are new or updated financials required"** as applicable.



Financial Information

Financial information is used to help determine if the clients meet Legal Aid Alberta's Financial Eligibility Guidelines, which are based on 30-day and 12-month net income. Criminal Youth and Independent Counsel for Child Matters do not require a financial assessment. If no financial information is required, select 'No' to skip this section.

Are new or updated financials required?

☒ Yes

Family Size (including the client) *

Marital Status *

Select ▼

Client on AISH?

☐ No

Client 30 Day Net Income *

Client 12 Month Net Income *

Does client have assets?

☒ Yes

Real Estate Equity Value *

Vehicle Equity Value *

Liquid Assets Equity Value *

Does client have monthly deductions?

☒ Yes

Monthly Child Support Payment Amounts *

Monthly Spousal Support Payment Amounts *

Monthly Child Care Payment Amounts *

Financial Notes

Financial Information is required when:

- The client has never applied with LAA (new client).
- Their last financial assessment was over 24 months ago.
- They previously applied but were found to be **above** the financial guidelines.

Prior to gathering financial information, ensure to ask the client if they:

1. Have they ever applied to LAA before?
2. When is the last time they applied or spoke to LAA?
3. Were they over financial guidelines last time they applied?

The responses to these questions can be used to determine whether financial information would be required or not. If you are not sure whether financials are needed, it is best to err on the side of caution and gather the information if possible, to avoid delays in the client's application.



Family Size and Marital Status

The first steps for Financials are gathering the client's family size and marital status as both impact their financial eligibility.

Family Size Includes

- The client
- The client's spouse (if applicable)
- The client's dependents (if applicable)

Spouse: For LAA purposes, a spouse is considered to be common-law or married. For common-law spouses, they need to be living together for at least 12 months in an interdependent relationship and/or have a biological child together.

Dependents: Dependents refer to any child under 18 in the client's care at least 40% of the time. These can be biological or non-biological children. As long as they are in the client's care for the set amount of time, they can be included.

- An example of 40% of the time is 3 days a week. When in doubt, there are parenting time calculators available online to assist in determining the percentage of time the dependents are in the client's care.

Any further information about the family size such as more complicated situations can also be added into the financial note to assist the contact centre in case further clarification is required.

Marital Status

Select the applicable marital status that is applicable to the client at the time of the application:

- Single
- Common-Law/Married
- Separated

Suggested Questions to Ask

- **Who do you live with?** If they mention a spouse and/or children, they may be included, depending on how often they reside with them. If any other family member or person, they would **not** be included in family size.
- **Are you legally married? How long have you been living with your partner/spouse?**



Income

The next section regarding financials is income. LAA considers the client's last:

- 30 days NET income
- 12 months NET income

If the client's marital status is **Common-Law/Married**, their spouse's last 30-day and last 12-month income must also be captured under the "Partner's Income" fields.

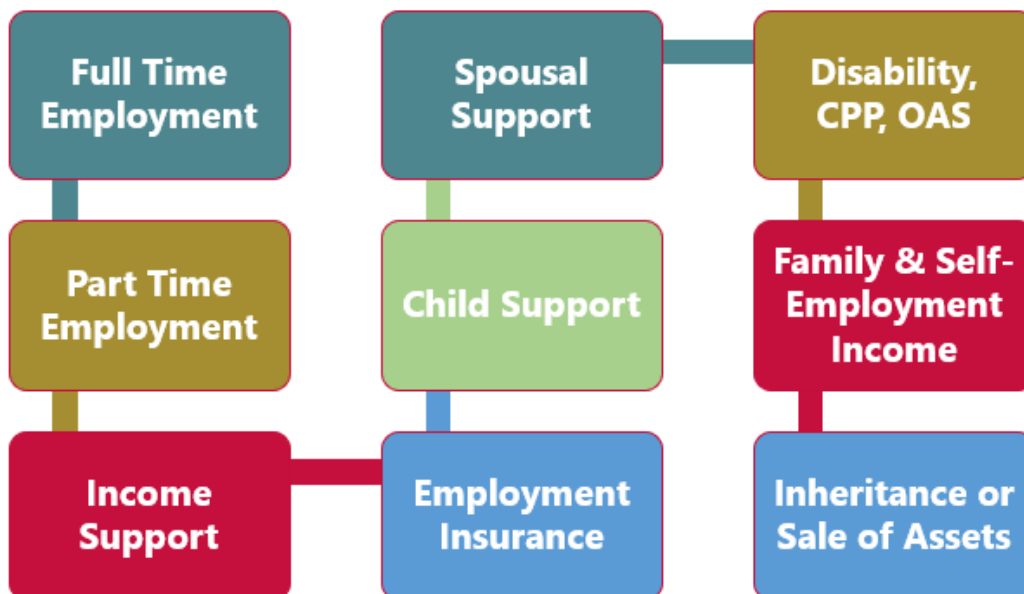
If a client is on **AISH**, select "yes". The income fields will disappear as clients on AISH automatically meet our financial guidelines, as long as their assets are still within the guidelines.

Client on AISH? *



Sources of Income

LAA considers the following sources of income:



Suggested Questions to Ask

- Are you on AISH?
- What was your "take home" income for the last 30 days (closest estimate)?
- What was your "take home" income for the last 12 months (closest estimate)?



Assets

LAA also considers assets as part of a client's financial eligibility.

3 Types of assets:

- Real Estate
- Vehicles
- Liquid Assets (bank account, RRSP, Investments)

If the client and/or their spouse does not have any assets, toggle the field to "No" and the asset fields will disappear.

Does client have assets?



Asset Fields

The calculated equity value for each type of asset the client has will be entered into the applicable fields.

Real Estate Equity Value *

Vehicle Equity Value *

Liquid Assets Equity Value *

The total equity of assets is calculated as:

Value of Asset minus Balance Owing = Equity Value

House valued at \$150,000 and client owes \$100,000 = \$50,000 Equity

If a client does not have a specific type of asset such as real estate, but they have a vehicle and bank account, you can leave the real estate field as blank and enter in data in the other fields.

Suggested Questions to Ask

- **Do you own any property or vehicles?** If yes, ask for the estimated value of the property/vehicles and estimated amount owing.
- **Do you have any bank accounts?** If yes, how much money is in their account right now?



Expenses

LAA considers 3 different types of expenses as a part of a client's financial eligibility. These expenses will be deducted from the client's overall calculated income.

3 Types of Expenses:

- Child Support Payments
- Spousal Support Payments
- Childcare Payments

These expenses can be formal (court-ordered) or informal (not court-ordered), however they must be a fixed monthly amount for a 12-month period such as \$250/month).

If they do not pay any of these types of expenses, toggle the field to "No" and the expenses fields will disappear. Only one of the fields needs to be filled out if it is set to "Yes".

Note: LAA does not consider Rent/Mortgage payments or other household bills as an expense for the purpose of their financial eligibility.

Suggested Questions to Ask

- **Do you pay child support, spousal support or childcare expenses?** If yes – how much per month?

Financial Notes

The last portion of the financial section is Financial Notes.

A financial note is not required but is encouraged if the client's financial situation is complicated or may require further explanation. Further context is crucial to preventing delays in processing the client's application.

Financial Notes

Financial Information Overview

When gathering financial information from the client, consider the following:

- You are not expected to have a fulsome financial conversation with the client – the goal is to gather the information as quickly as possible.
- The goal of gathering this information is to reduce barriers for clients accessing LAA and ensure their applications are processed efficiently.

Accuracy is key and avoids delays!

- Ensure to avoid keying/entry errors as much as possible. For example, if the client advised they made \$4,000 in the last 12 months, be mindful of not adding an extra



"0", making it \$40,000 instead. This error could significantly impact the client and make them over our financial guidelines.

- Intake Officers are ultimately responsible for determining the client's financial eligibility, however, if the information is accurate and does not require further follow-up with the client, the application can be processed promptly, ensuring access to justice.

Matter Information

The last section of the Gateway form is Matter Information.

Area of Law

The first step of this section is to select the area of law. The selection will inform which fields populate on the form.

Matter Information

Area of Law *

Select

Select

Child Welfare

Criminal

Family

Immigration

Independent Counsel for Child



Court Location

Select the applicable court location(s). Multiple court locations can be selected if needed. You can search for the court locations(s) via the search bar.

Court Location *

Select or search options

Select all

Airdrie

Alberta Hospital Edmonton

Alexis First Nation

Athabasca

Preferred Counsel

LAA offers choice of counsel for clients in most situations, allowing the client to choose which lawyer they wish to take their file. We attempt to appoint their preferred counsel as much as possible to help facilitate the best possible experience for the client.

Having the option for preferred counsels to be listed on the Gateway form assists us with ensuring clients have choice of counsel if they wish. It is important to note that we can never guarantee that a client will receive their preferred lawyer(s), but we do always try our best.

Up to 3 names of Preferred Counsel can be entered on the form:

Subject to LAA Policy and discretion, the client can provide the names of up to three lawyers as their preferred choice of counsel if LAA approves coverage.

Does the client have preferred Counsel?

☒ Yes

Preferred Counsel 1 *



Preferred Counsel 2



Preferred Counsel 3



The fields have a lookup function which includes all available lawyers on our Roster.



Lookup records ×

Q

Choose one record and click Select to continue

✓ Full Name ↑	Firm Name
<input type="checkbox"/> Aarbo, Darryl A	Aarbo Fuldauer LLP
<input type="checkbox"/> Abakpoya, Tammy	Viewpoint Legal
<input type="checkbox"/> Abdul Razak, Nafisa	Knight Molloy Patrick LLP
<input type="checkbox"/> Abdulgany, Wael	Salloum & Company
<input type="checkbox"/> Abellera, Emmanuel Somera	Abellera Law
<input type="checkbox"/> Abidogun, Elizabeth	Pinnacle Legal
<input type="checkbox"/> Abidogun, Elizabeth	Pinnacle Legal

< 1 2 3 4 5 6 7 8 .. 135 >

Select

Cancel

Remove value

This lookup function assists with ensuring the requested counsel is on our Roster as well as accurate spelling, allowing the client to obtain their preferred counsel as efficiently as possible.

Criminal Matters

Gateway applications can be submitted for any criminal charge being heard in Alberta.

Help Needed on All Active Charges

If yes: Good to go to continue submitting the Gateway form.

If no: A pop-up will appear:

ALERT! As we cannot split active charges, please direct the client to call so they can provide their consent.

Close



Family Matters

If the court location is selected as Edmonton, Calgary, or Red Deer, the following field will pop up:

Does the client have a confirmation of Attendance/Referral from Resolution Services? *

Select

Select

No

Yes

If Yes – Good to go to continue to submit the application.

If No – This pop-up will appear:

Prior to seeking legal representation, Legal Aid Alberta requires clients to attempt resolution options. If client has not yet been to Resolution Services, please do not submit this form. If client has refused assistance from RS, there is no guarantee they will qualify for Legal Aid Representation

Close

The intention of this pop-up is to avoid Gateway applications from being submitted where LAA will not be able to assist due to pre-court requirements to attend Resolution Services.

Note: While the Resolution Services field only pops up for Edmonton, Calgary, and Red Deer court locations, please note that clients can be referred to RS for family legal issues in any court location in Alberta as part of the Intake Process.

- Ask the client about resolution services for every family matter, no matter the location, if they have spoken to Resolution Services and have confirmation of attendance or referral.
- If they do, please indicate this and upload a copy of it, as this will significantly speed up the process for the client.



Select the applicable legal issue(s). Gateway forms can be submitted for the following Family Legal Issues:

Parenting

Child Support

Contact

Guardianship

**Spousal/Partner
Support**

Family Property

Divorce or Family Law Act

Indicate yes or no – Intake Officers will use this information to input the correct legal issues.

Has a Final Order been Granted?

Indicate yes or no – Intake Officers will use this information to determine the correct legal issues and any appropriate next steps regarding the client's application.

Child Welfare Matters

Gateway forms can be submitted for the following Child Welfare legal issues:

**Temporary
Guardianship
Order (TGO)**

**Permanent
Guardianship
Order (PGO)**

**Supervision
Order**

Other Child Welfare issues such as Post-PGO Access, Private Guardianship, and Terminate PGO will continue to complete applications over the phone.



Independent Counsel for a Child Matters

Gateway forms can be submitted for the following Independent Counsel for a Child legal issues:

**Divorce
or
Variation of Divorce**

Family Law Act

Immigration Matters

Gateway forms can be submitted for the following Immigration legal issues:

**Refugee
Claims**

**Admissibility
Hearings**

**Detention
Review
Hearings**

Refugee Claim: Client is refugee protection before the Refugee Protection Division.

Admissibility Hearing: Canada Border Services Agency has made a referral to the Immigration Division to determine if the client is admissible to Canada.

Detention Review Hearing: The client is being detained by Canada Border Services Agency in Immigration Detention.

Matter Details – All Areas of Law

Input the next appearance date, docket/file number, and courtroom number if applicable.

Next Appearance Date

M/D/YYYY 

Docket/File Number

Courtroom

Do you want your matter heard in French?

☐ No

Criminal Matters: Please provide at least one docket number that requires coverage.



Non-Criminal Matters: The Docket/File Number can be left blank unless there is a file number available to provide.

Do you want your matter heard in French?

Please ask the client this and toggle the field to “yes” or “no” as applicable. This field was introduced in response to the movement within the Alberta court system to offer trials in French.

Summary of Facts and Legal Issues

Non-Criminal areas of law will have a Summary of Facts and Legal Issues field. This field is meant to provide the Intake Officers with further context regarding the legal issue(s) and will help assist them process their application. It also assists with the creation of material facts, which lawyers see when an offer is issued to them. Therefore, it is important to provide as much relevant information as possible.

Please see relevant information that can be gathered for each area of law:

Family Matters

- Are there any protection orders in place? (ie. EPOs, Retraining Orders, No Contact Orders)
- Is there any current Child and Family Services (CFS) involvement?
- Does the opposing party have a lawyer?
- Is the matter being heard in Court of Justice or Court of King’s Bench?
- Any additional details regarding the legal issue that may be relevant.

Child Welfare Matters

- Has the child been apprehended? If yes, when?
- When was the client served the Notice of Application?
- What is Child & Family Services alleging? (e.g., substance abuse, physical abuse, etc.)
- Has Child & Family Services been involved before?

Independent Counsel Matters

- What are the current living arrangements of the children?
- Are all children included on the order? Are there separate orders?
- Are there any upcoming deadlines?
- Has counsel ever been appointed to the child previously?
- Do the parents/guardians have lawyers? If so, who?

Note: Please provide at least 1 piece of contact information for each parent/guardian involved (phone number/email address).



Immigration Matters

Immigration matters require a lot of information to be gathered.

- What country are they from, when did they leave that country?
- How and when did they arrive to Canada? Who did they come to Canada with? (did they go to other countries first?)
- What was their status in the last country they lived in? What was their status when they arrived in Canada?
- Where did they start their refugee claim (At the border, or in Canada on the computer?)
- Why did they come to Canada? What happened to them?
- Do they have anything that proves what they are saying is true? (Do they have any newspaper articles, magazine articles, letters, photos, legal documents, etc.?)
- Have they attempted to claim refugee status in another country or in Canada? Have they ever lived illegally in another country? How long did you stay in that country?
- Why did they come to Canada and not somewhere else?
- Have they submitted your "Basis of Claim" form? If yes, when?
- Have they completed your eligibility interview?
- What language are they most comfortable speaking? Do they need an interpreter?

Related Parties

Non-criminal areas of law include a Related Parties section on the form. Related parties include but are not limited to:

- Children
- Child's Parent
- Child's Grandparent
- Sibling
- Separated Spouse/Partner

Except for Immigration matters, there should always be at least 1 related party (ie. Child/Separated Spouse, etc).

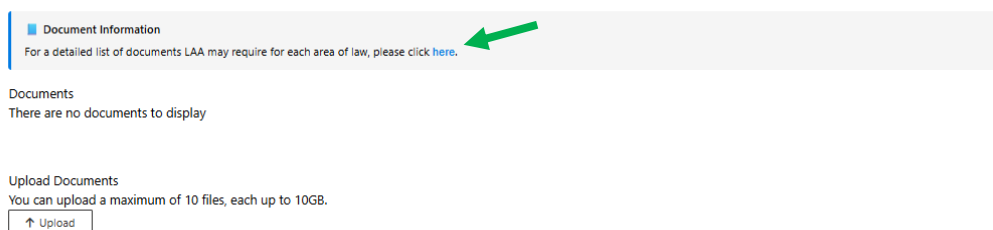
Related parties are important to include as they assist lawyers who receive offers to complete conflict checks as well as the Intake Officers completing the application to determine any next steps.

Note: If related parties are missing, Intake Officers will need to reach out to the client to obtain the information, which could result in significant delays. Please try and obtain DOB for the related parties whenever possible, however, if this information is not known, this can be left blank.

Documents

Documents pertaining to the legal issue(s) can be uploaded directly to the client's gateway application. Up to 10 documents can be uploaded. The documents will be viewed by the Intake Officers and will be uploaded to the client's file once the Gateway application is processed.

A list of documents required for each area of law is available by clicking the hyperlink on the Gateway form:



Criminal Law: There are no specific documents required. However, if you have a document, you feel would be useful for their application, feel free to submit it.

Note: Documents are a crucial part of the application process for our clients. If we require a document but do not receive it, this could cause significant delays for the client as often their file cannot be moved further along without the required documents. Please ensure to provide the documents with the GW application as much as possible to ensure a seamless and efficient application process for the client.

Submitted Forms & Form Statuses

In LAA Portal, you will be able to view all Gateway forms you have created in one view by clicking on "Client Gateway" at the top right-hand corner.

Legal Aid Alberta

Home

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Client Gateway

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Megan Phillips ▾

☰ All ▾

Enter text to search

🔍

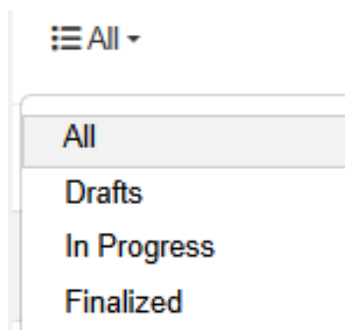
Create New Client Gateway

Form Number ▾	First Name	Last Name	Date Of Birth	Court Location	Next Appearance Date	Area of Law	Date of Submission	Form Status	
1223	Test	Test	4/29/2025	Edmonton	7/2/2025	Criminal	6/9/2025	New	▾
1222	Miranda	Test	2/25/1996					Draft	▾
1130	Megan	Test2	4/30/1995	Edmonton	6/5/2025	Criminal	5/30/2025	Approved	▾
1126	Megan	Test	5/14/2025	Edmonton	6/4/2025	Criminal	5/30/2025	Form Entered Successfully	▾

Forms can be filtered by:

- All forms
- Drafts
- In Progress or Finalized

To filter forms, select "All" at the top left-hand corner and choose a filter.



If you need to update/view or check status on a form you have created, you can search the forms by form number, client name, or DOB in the text box:



Form Statuses

From this view, you can see the status of each form.

Form Number ↓	First Name	Last Name	Date Of Birth	Court Location	Next Appearance Date	Area of Law	Date of Submission	Form Status
1223	Test	Test	4/29/2025	Edmonton	7/2/2025	Criminal	6/9/2025	New <input type="button" value="v"/>
1222	Miranda	Test	2/25/1996					Draft <input type="button" value="v"/>
1130	Megan	Test2	4/30/1995	Edmonton	6/5/2025	Criminal	5/30/2025	Approved <input type="button" value="v"/>
1126	Megan	Test	5/14/2025	Edmonton	6/4/2025	Criminal	5/30/2025	Form Entered Successfully <input type="button" value="v"/>

These are the different form statuses and what they mean:

- **Draft:** Form has not yet been submitted.
- **New:** Form has been submitted but not yet processed.
- **Approved:** Form is being actioned but not fully processed.
- **Form Entered Successfully:** Form has been actioned; no follow up required.

***Note** – this does not indicate if the client was eligible; just indicating that their application was able to be processed.

- **Callback Required:** Form processed, follow-up was required from the client.
- **Duplicate Form:** No action taken – another form for same legal issue(s) were actioned and/or we already received an application.
- **Form – Updated:** Appropriate updates were made, form was processed.

What happens after you submit the form?

When a form is submitted, it appears in a Gateway Dashboard in CRM. Each day, several Intake Officers are assigned to process the Gateway forms within a 24-hour turnaround period.


Journey of a Gateway Form



Providing Next Steps to Clients

The Client Gateway process was designed to assist clients in overcoming barriers when applying to LAA and allow the Contact Centre to process more applications in a shorter amount of time. The goal of a submitted Gateway form is that little to no follow-up will be required from the Contact Centre to ensure we can avoid delays and assist all our clients promptly.

To support the clients in this process, please keep in mind the following:

- 
- **No Follow-up Required:** Once a Gateway form is submitted, no follow-up from yourself or the client is required. If you wish to follow up on the status of Gateway, this information is available to you via the Form Statuses in the LAA Portal or DC Portal.
 - **LAA will contact the client:** Fortunately, most Gateway applications are able to be processed without additional follow-up from Intake Officers. If we do require anything further from the client, we will reach out to the client to obtain the information. Sometimes this does result in delays if the client does not answer our requests for information, therefore it is crucial to provide all the required information on the Gateway form as much as possible to avoid this from occurring.
 - **Advise the client not to call back:** All clients at LAA are advised not to call back unless specifically directed to do so in limited circumstances. Our goal is first call/first-file resolution, eliminating the need for clients to call in for any updates. We have technological measures in place such as automatic email and text notifications that go out to clients providing them an update on their application, especially once a lawyer has been assigned.
 - **Provide Clear Next Steps:** Providing clear next steps to clients regarding what to expect once their Gateway application is submitted is key in ensuring they have confidence that you and LAA have their “backs” and that their application needs have been taken care of. Please ensure to advise clients that no further action is required from them and that if LAA requires anything further, we will reach out. Advise them to keep an eye out from any emails from LAA providing updates on their applications and any further next steps that may be provided.

Support & Questions

Additional resources will have been provided to you by email (from clientgateway@legalaid.ab.ca)

If you have any questions or experience any technical difficulties, please reach out to clientgateway@legalaid.ab.ca.



Legal Aid Alberta

