Giving advice via remote access systems
OVERVIEW OF CLINICS
LOCATIONS
Lessons Learned
The Open University
BPP
skype
www
Other Technology

Open Justice Law Clinic

The Open University

- Opened in September 2017
- Virtual law clinic
- Range of legal advice including contract, tort, consumer, small claims and employment
- Generate cases via our website
- Cases are triaged, if suitable for the clinic allocated to a firm of students
- Interviewed via Adobe connect- evenings/weekends
- Cases are managed through Clio case management system
- Advice only- 21 days from the interview

BPP Enterprise Clinic

- Opened in March 2017 - Manchester and London
- Aimed at start-ups and small enterprises
- Initial-advice only
- Fact-finding meeting followed by emailed advice within 14 days
- Partnerships with The Entrepreneurial Refugee Network
- Meetings in person and via Skype – approximately 25% of appointments conducted via Skype
- Paperless clinic – Intralinks (Document Management System), Trello & Slack.

Why have a virtual law clinic?

Wanted to reach clients who could not travel to a face-to-face clinic.

Help students to develop online collaboration skills, familiar with technology.

Manage waiting times between sites

Rise in Virtual Law Firms

Advances in technology driving the rise of virtual law firms in the sector wanted to give students the same opportunity to collaborate on cases wherever they are.

OU students study remotely

essential to be able to deliver services to clients at a distance using technological means of communication.

Suits modern client

Virtual meetings suit client type who are familiar with online platforms and technology

More volunteer opportunities

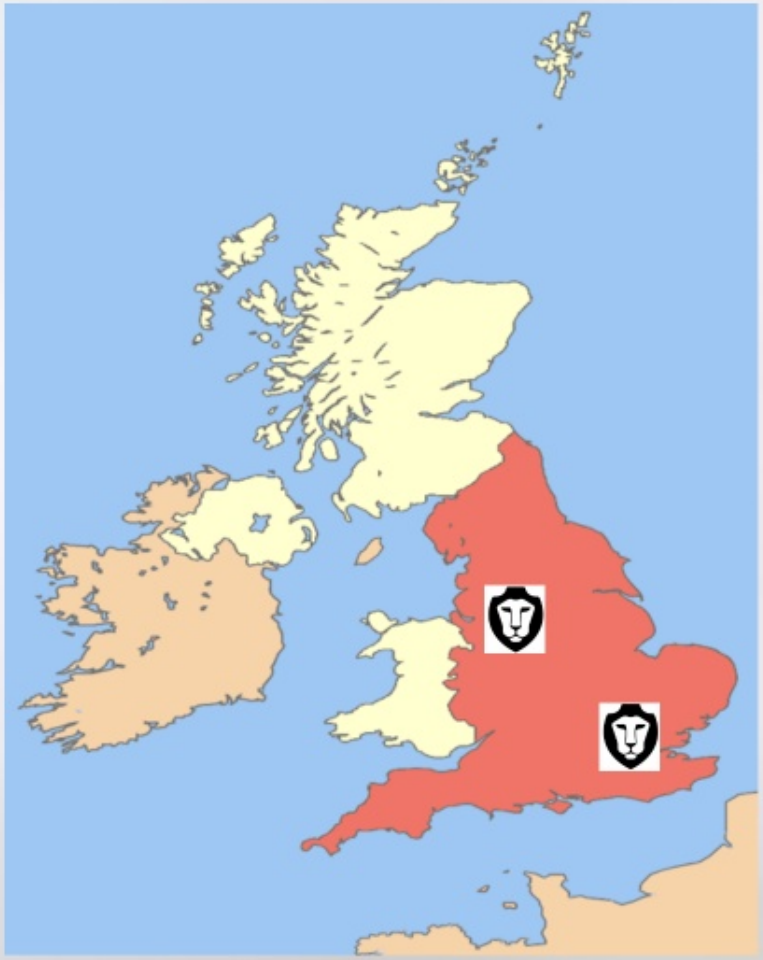
Supervising solicitors outside of cities can participate.

The Open University

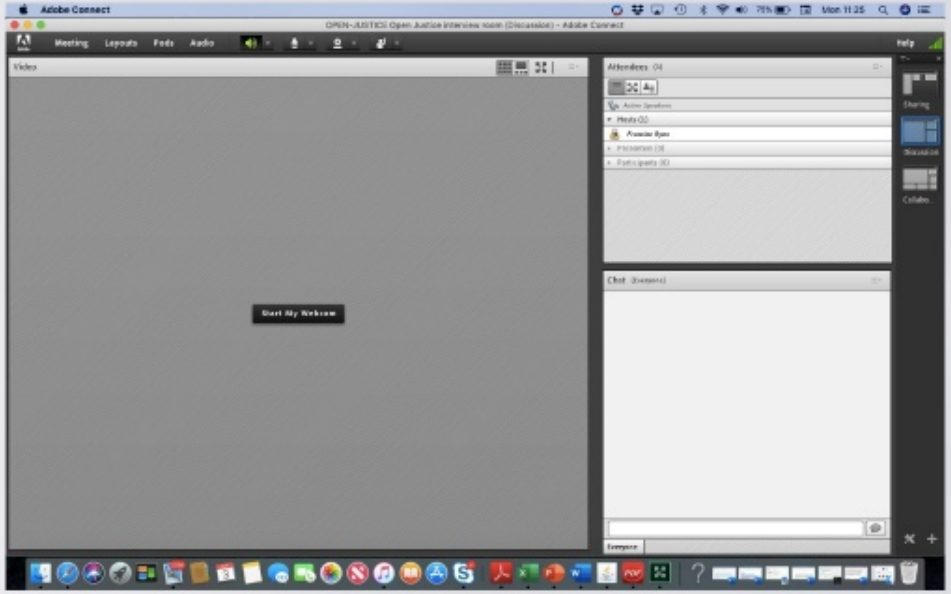
- Anyone with an internet connection can access the clinic
- Accept cases regardless of geographical distance.
- Open all year around
- Offer interviews around client's availability

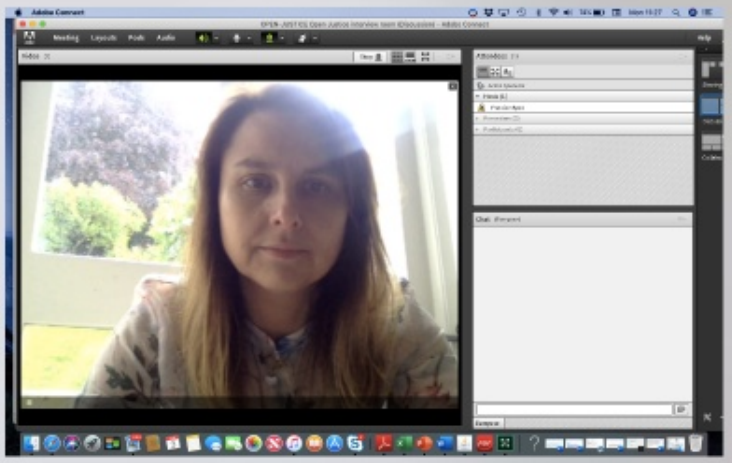
BPP

- Clients in or around Manchester and London
- Skype appointments where client can't attend in person
- Open September – July
- Appointments offered at either 5 or 6pm.

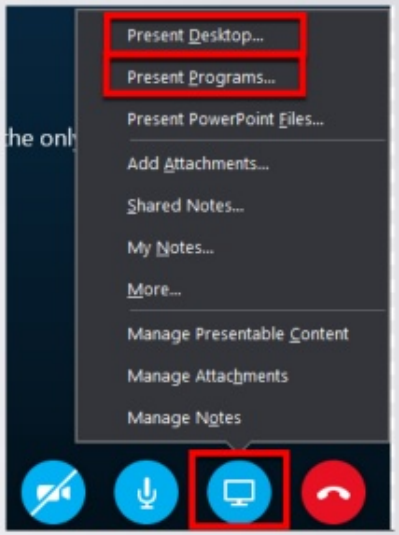


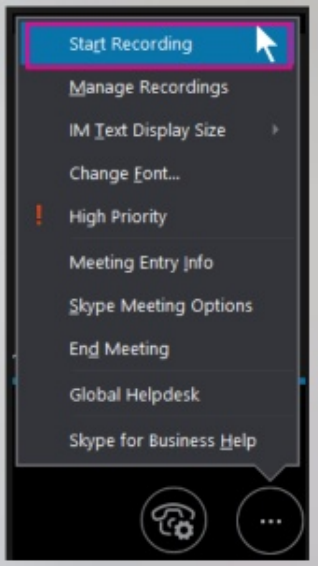
Online Meetings using: Adobe Connect





Online Meetings using:





The 2 platforms compared:

Features	Adobe Connect	Skype
Brief Description	Online Meeting Room	Video Conferencing Software
Cost	Licence Fee	Free
Ease of use	Client receives a link – simply click	Requires install – login details provided if not already a member
Devices	Both mobile and desktop use supported	Both mobile and desktop use supported
Security	Highly secure communication with advanced security	End-to-end encryption of both calls and text messages / GDPR compliant
Video	Yes	Yes
Recording facility	Yes	Yes
Chat boxes	Yes	Yes
Screen-sharing	Yes	Yes
Note-taking	Yes	No

Tips for using video conferencing in clinic

Technology
Plan for the unexpected!

- Internet speed check
- Wired connection better than wifi
- Spare laptop / headphones

Clients
Do they know what to expect?

- Skype test day before?
- Ask them to be somewhere quiet
- Troubleshooting guide

Students
Take the lead

- Work harder to form a rapport
- Slow down!
- Test call before appointment

CLIO

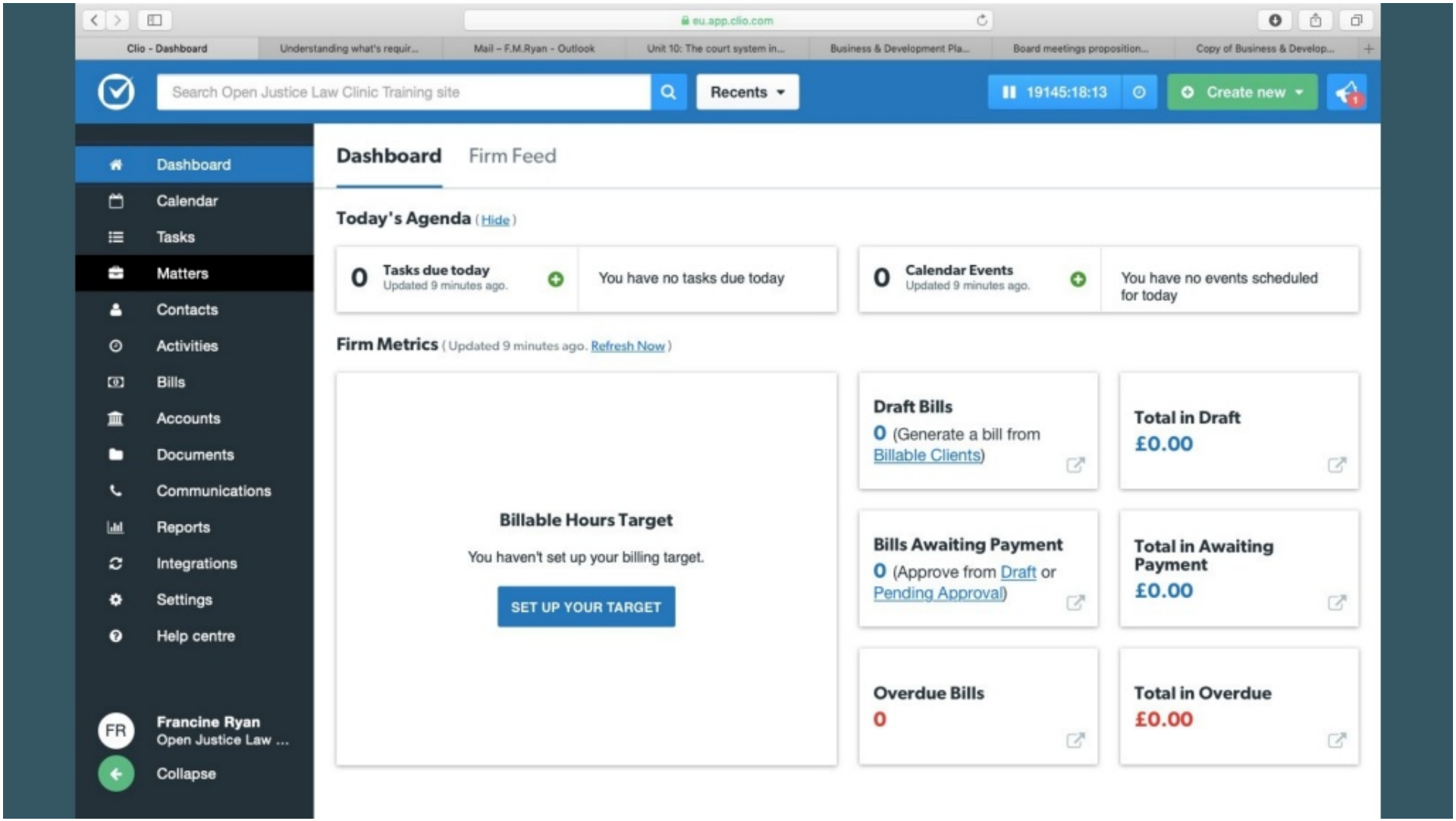
Intralinks

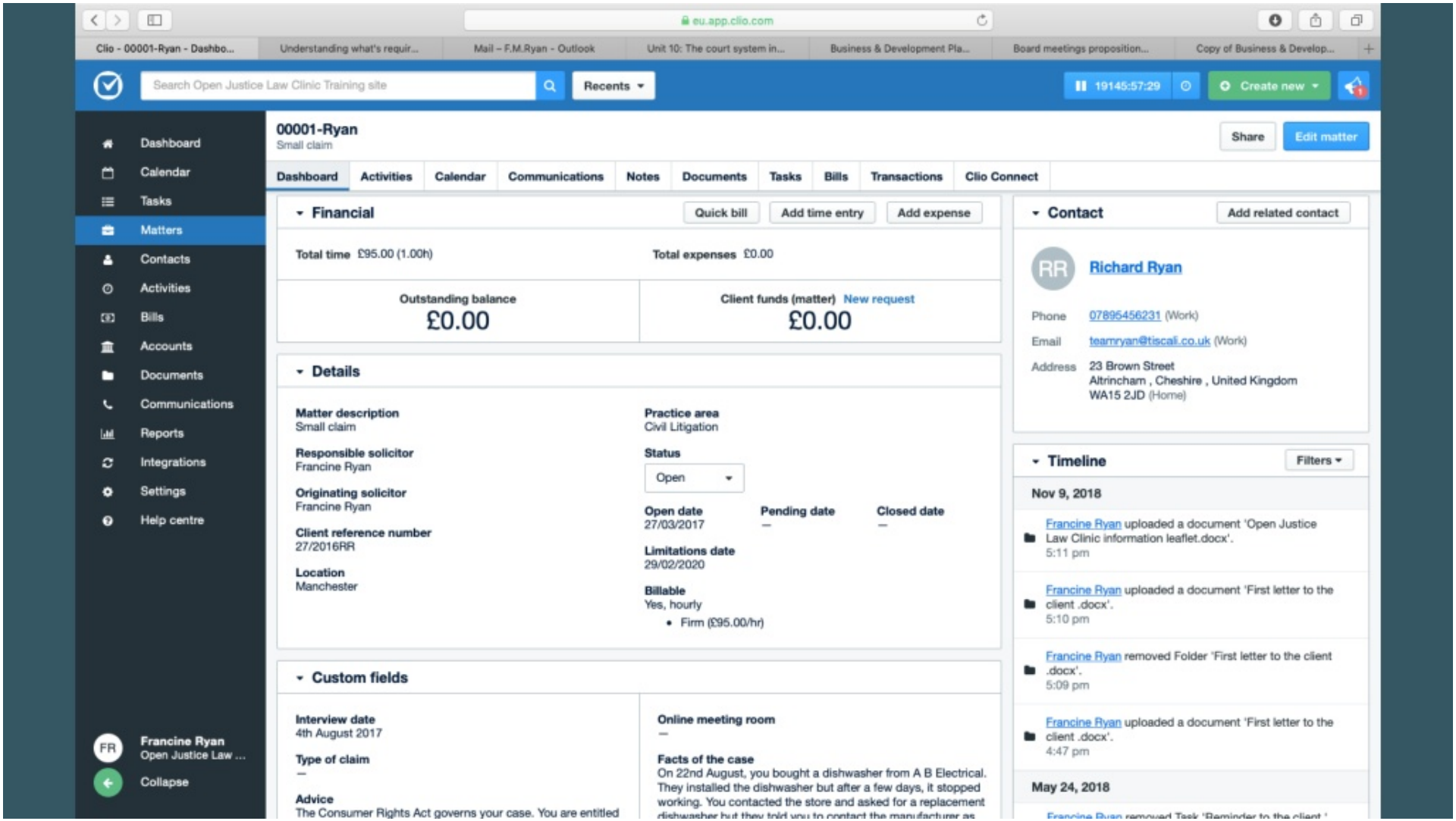
Text Msg

Other ideas

Clio- case management system

- Free via academic access programme, Law Society endorsed
- GPDR compliant
- Two versions- training site and live site
- Clio's cloud-based practice management software gives you access to everything from one place
- Manage cases, clients, documents, bills, calendars, time tracking, reporting, and accounting, all from one platform.
- All case interaction takes place within Clio.


eu.app.clio.com
Clio - Dashboard
Understanding what's requir...
Mail – F.M.Ryan - Outlook
Unit 10: The court system in...
Business & Development Pla...
Board meetings proposition...
Copy of Business & Develop...
Search Open Justice Law Clinic Training site
Recents
19145:18:13
Create new
Dashboard
Calendar
Tasks
Matters
Contacts
Activities
Bills
Accounts
Documents
Communications
Reports
Integrations
Settings
Help centre
FR
Francine Ryan
Open Justice Law ...
Collapse
Dashboard
Firm Feed
Today's Agenda (Hide)
0 Tasks due today
Updated 9 minutes ago.
You have no tasks due today
0 Calendar Events
Updated 9 minutes ago.
You have no events scheduled for today
Firm Metrics (Updated 9 minutes ago. Refresh Now)
Billable Hours Target
You haven't set up your billing target.
SET UP YOUR TARGET
Draft Bills
0 (Generate a bill from Billable Clients)
Total in Draft
£0.00
Bills Awaiting Payment
0 (Approve from Draft or Pending Approval)
Total in Awaiting Payment
£0.00
Overdue Bills
0
Total in Overdue
£0.00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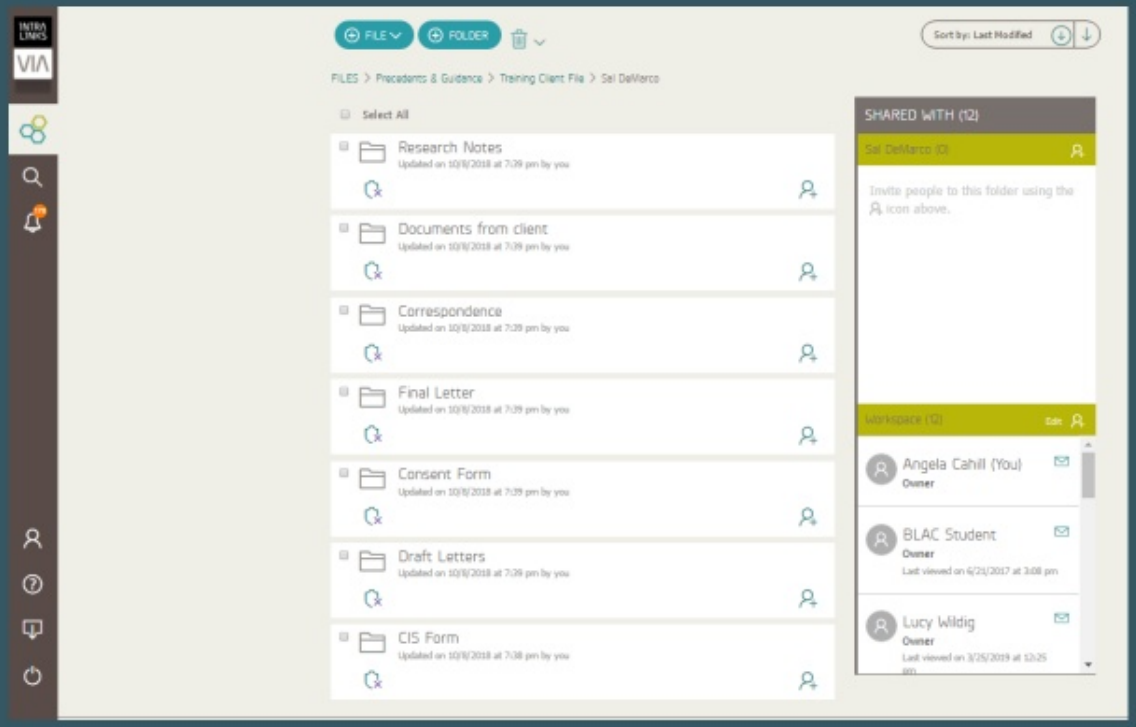
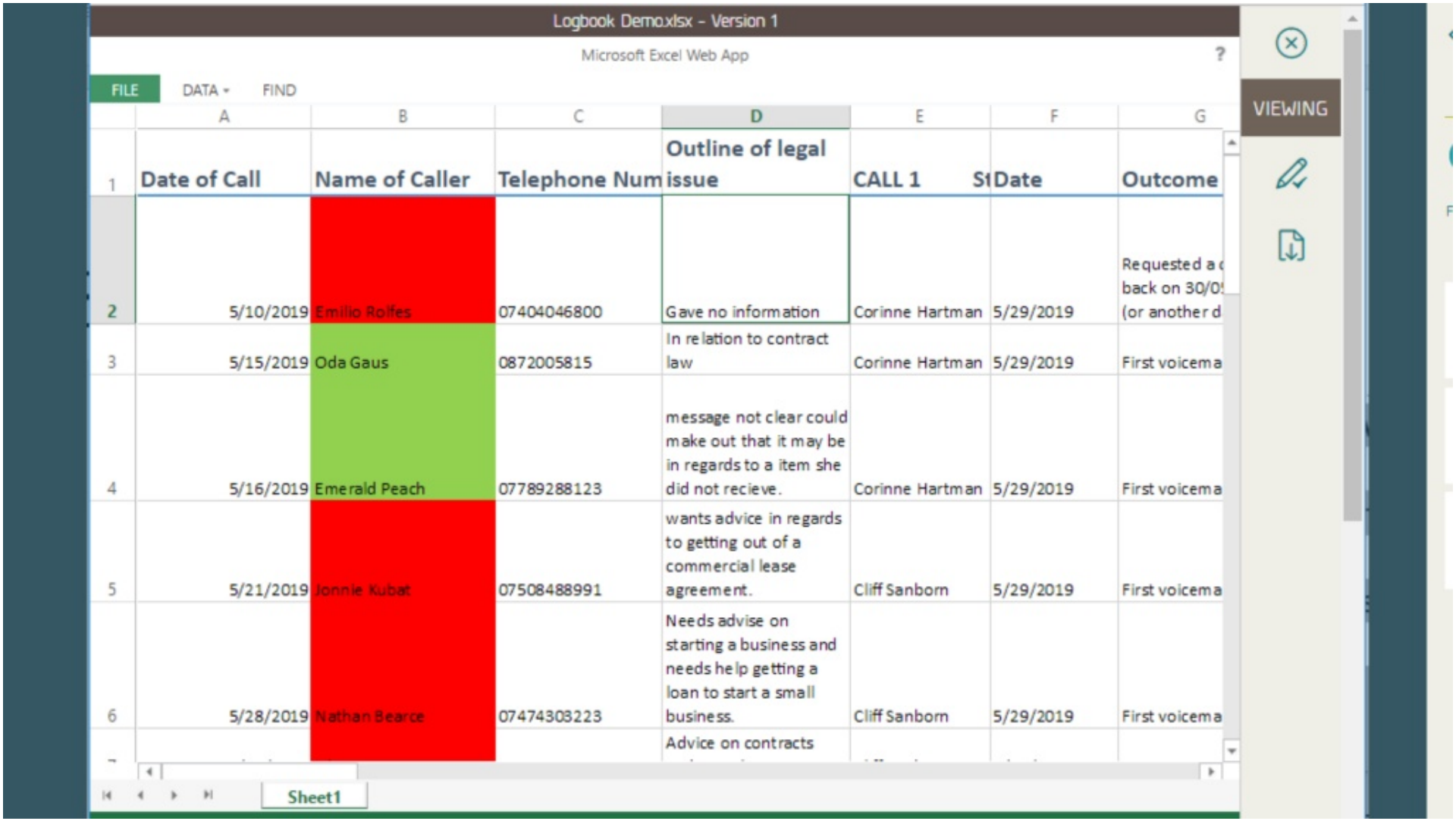
Search Open Justice Law Clinic Training site
Recents
19145:57:29
Create new
Dashboard
Calendar
Tasks
Matters
Contacts
Activities
Bills
Accounts
Documents
Communications
Reports
Integrations
Settings
Help centre
Francine Ryan
Open Justice Law ...
Collapse
00001-Ryan
Small claim
Share
Edit matter
Dashboard
Activities
Calendar
Communications
Notes
Documents
Tasks
Bills
Transactions
Clio Connect
Financial
Quick bill
Add time entry
Add expense
Total time £95.00 (1.00h)
Total expenses £0.00
Outstanding balance
£0.00
Client funds (matter) New request
£0.00
Details
Matter description
Small claim
Responsible solicitor
Francine Ryan
Originating solicitor
Francine Ryan
Client reference number
27/2016RR
Location
Manchester
Practice area
Civil Litigation
Status
Open
Open date
27/03/2017
Pending date
—
Closed date
—
Limitations date
29/02/2020
Billable
Yes, hourly
Firm (£95.00/hr)
Custom fields
Interview date
4th August 2017
Type of claim
—
Advice
The Consumer Rights Act governs your case. You are entitled
Online meeting room
—
Facts of the case
On 22nd August, you bought a dishwasher from A B Electrical. They installed the dishwasher but after a few days, it stopped working. You contacted the store and asked for a replacement
Contact
Add related contact
RR
Richard Ryan
Phone 07895456231 (Work)
Email teamryan@tiscali.co.uk (Work)
Address 23 Brown Street
Altrincham , Cheshire , United Kingdom
WA15 2JD (Home)
Timeline
Filters
Nov 9, 2018
Francine Ryan uploaded a document 'Open Justice Law Clinic information leaflet.docx'.
5:11 pm
Francine Ryan uploaded a document 'First letter to the client .docx'.
5:10 pm
Francine Ryan removed Folder 'First letter to the client .docx'.
5:09 pm
Francine Ryan uploaded a document 'First letter to the client .docx'.
4:47 pm
May 24, 2018

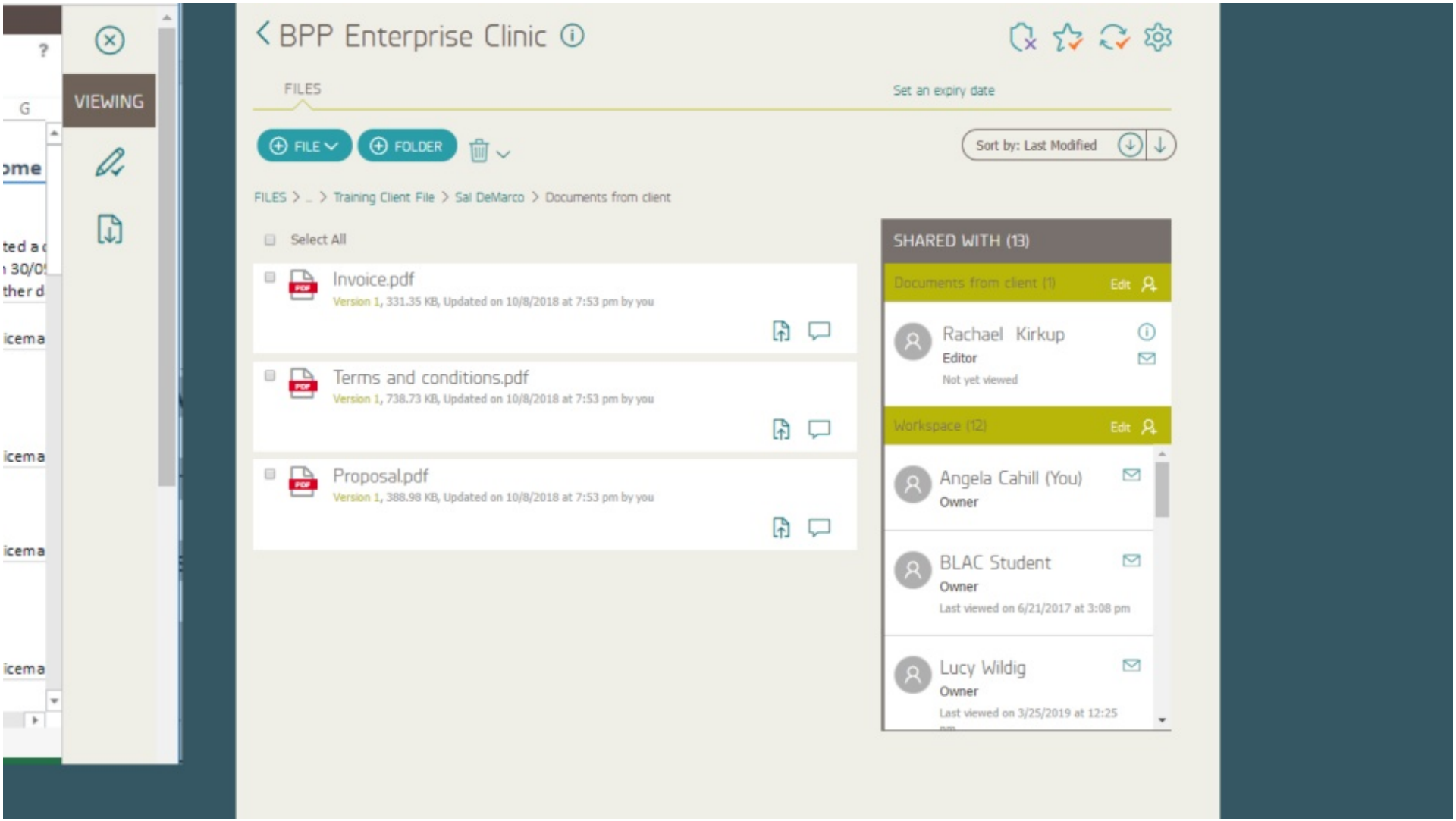
Intralinks Via – Document Management System



- Free through LawWorks
- Secure
- Intuitive
- Web-based, no installation / mobile compatible
- Limit access for different users
- Review previous versions of documents
- No CMS features e.g. no reminders or calendar integration.

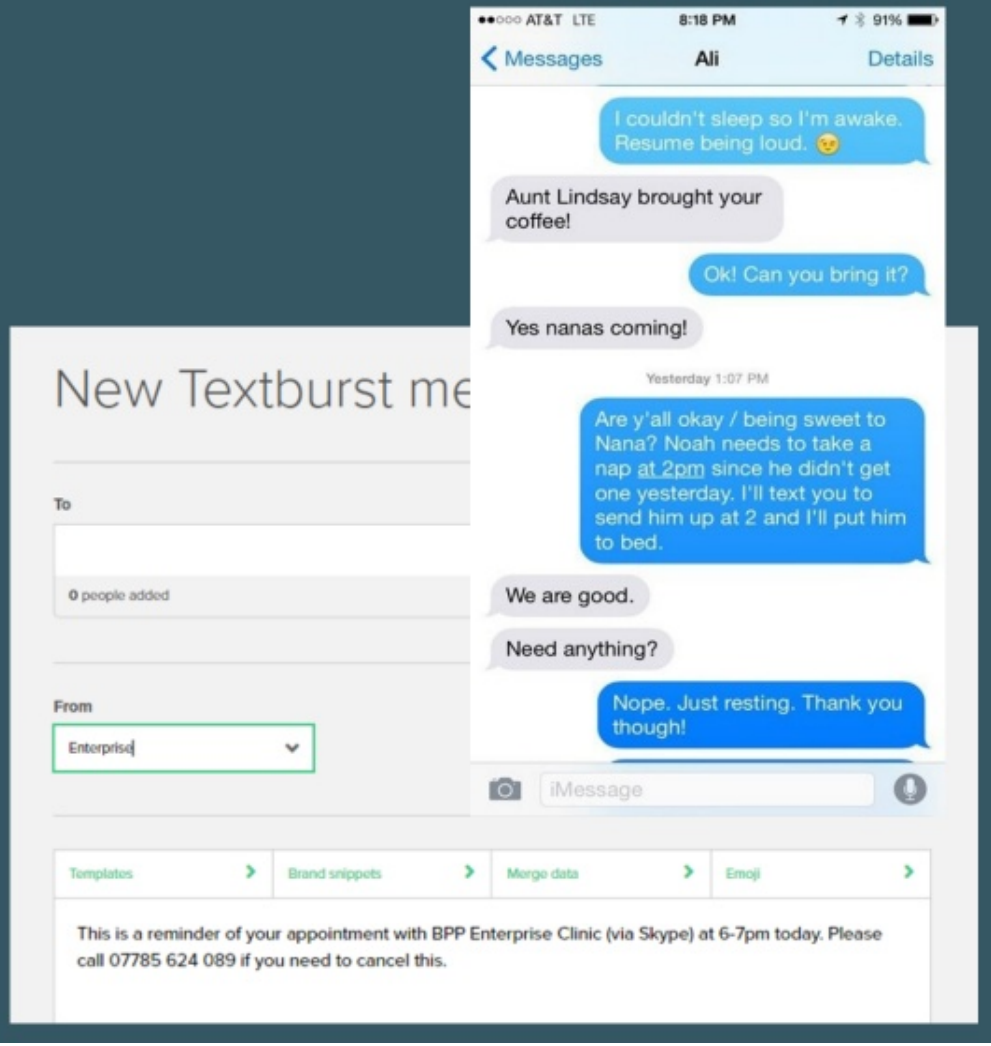


	A	B	C	D	E	F	G
1	Date of Call	Name of Caller	Telephone Num	Outline of legal issue	CALL 1	S1 Date	Outcome
2	5/10/2019	Emilio Rolfes	07404046800	Gave no information	Corinne Hartman	5/29/2019	Requested a c back on 30/0 (or another d
3	5/15/2019	Oda Gaus	0872005815	In relation to contract law	Corinne Hartman	5/29/2019	First voicema
4	5/16/2019	Emerald Peach	07789288123	message not clear could make out that it may be in regards to a item she did not recieve.	Corinne Hartman	5/29/2019	First voicema
5	5/21/2019	Jonnie Kubat	07508488991	wants advice in regards to getting out of a commercial lease agreement.	Cliff Sanborn	5/29/2019	First voicema
6	5/28/2019	Nathan Bearce	07474303223	Needs advise on starting a business and needs help getting a loan to start a small business.	Cliff Sanborn	5/29/2019	First voicema
				Advice on contracts			


VIEWING
BPP Enterprise Clinic
FILES
Set an expiry date
FILE
FOLDER
Sort by: Last Modified
FILES > .. > Training Client File > Sal DeMarco > Documents from client
Select All
Invoice.pdf
Version 1, 331.35 KB, Updated on 10/8/2018 at 7:53 pm by you
Terms and conditions.pdf
Version 1, 738.73 KB, Updated on 10/8/2018 at 7:53 pm by you
Proposal.pdf
Version 1, 388.98 KB, Updated on 10/8/2018 at 7:53 pm by you
SHARED WITH (13)
Documents from client (1)
Edit
Rachael Kirkup
Editor
Not yet viewed
Workspace (12)
Edit
Angela Cahill (You)
Owner
BLAC Student
Owner
Last viewed on 6/21/2017 at 3:08 pm
Lucy Wildig
Owner
Last viewed on 3/25/2019 at 12:25

Text Messaging

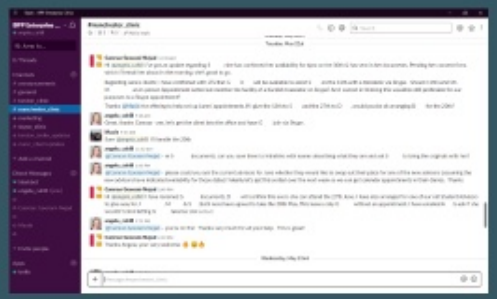
- Use a text service to send reminders to clients about interview appointments, or to chase documents.
- Not integrated into the CMS.
- Can be scheduled in advance.
- BPP - TextBurst
- OU - FastSms

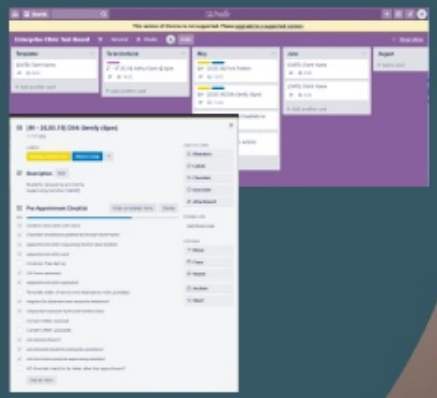


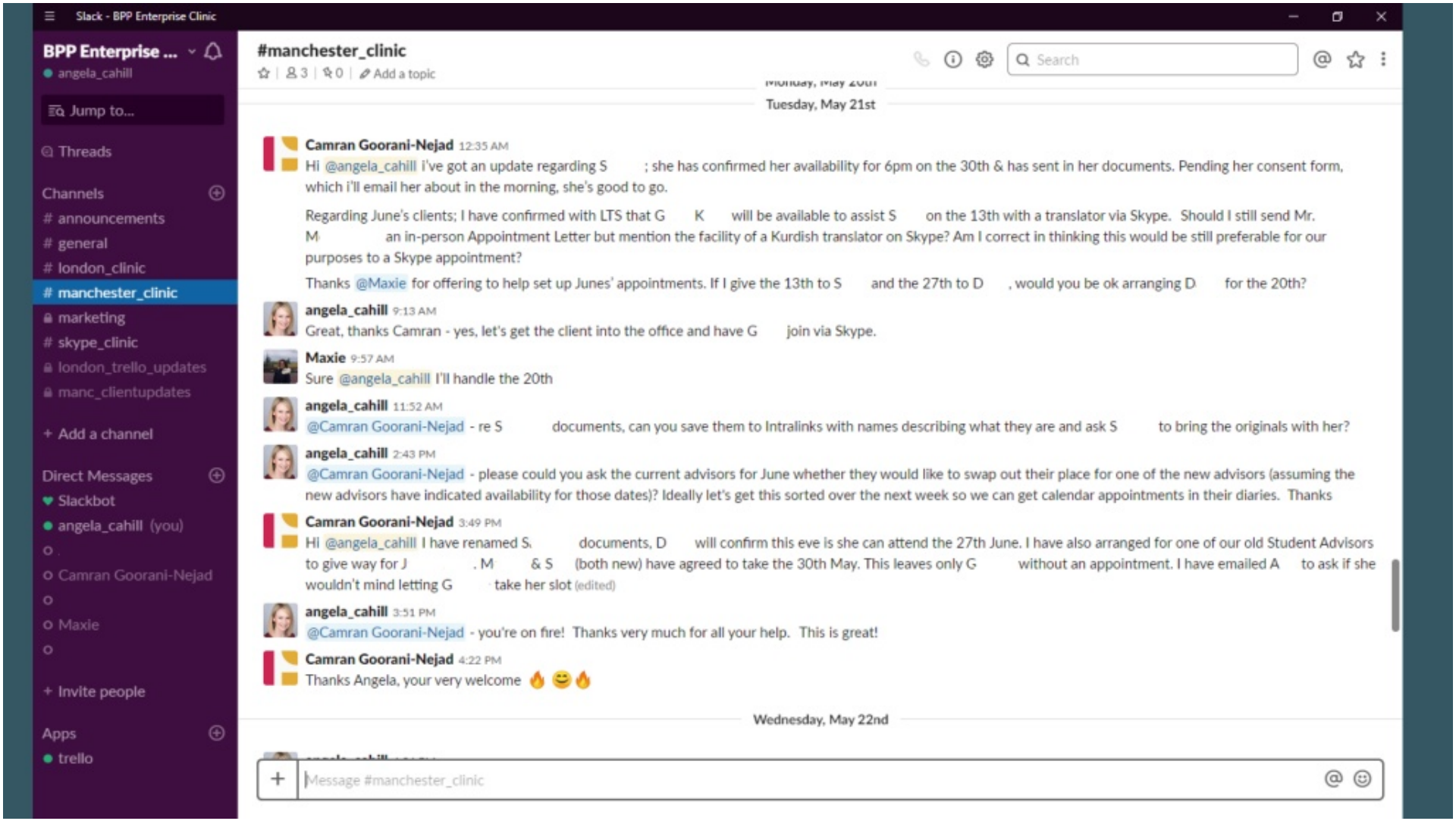
Other Ideas

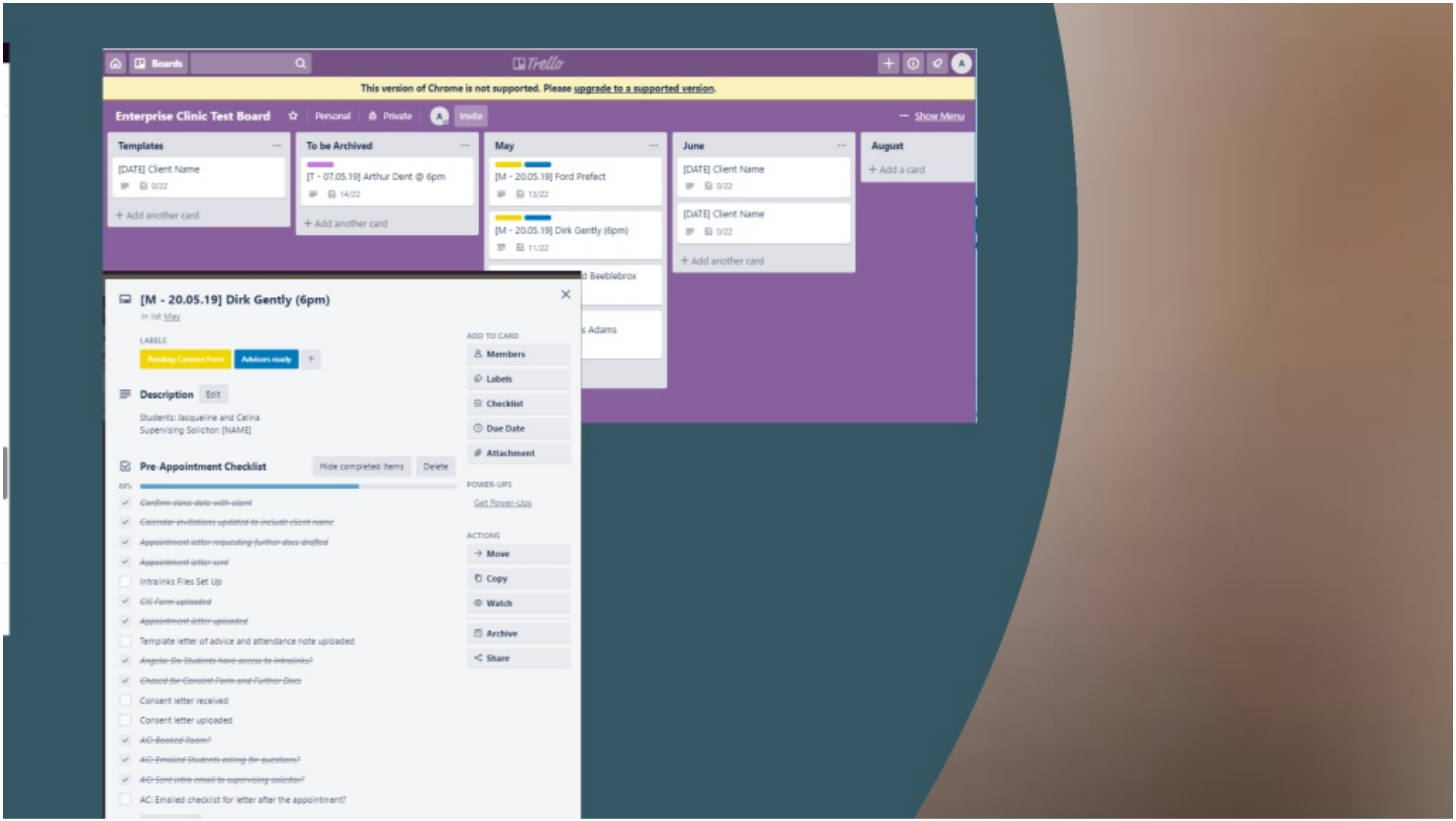
slack

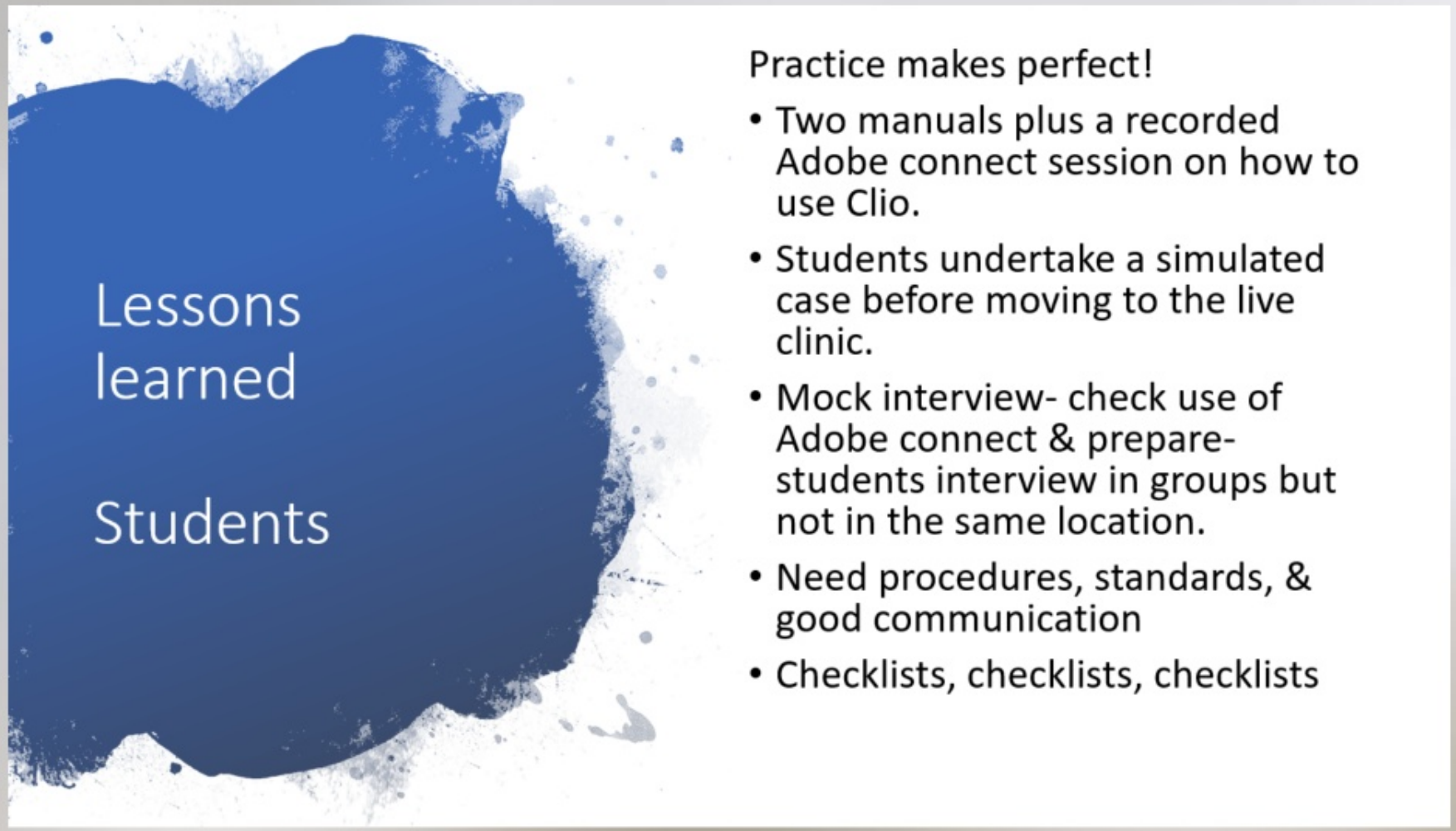
Trello

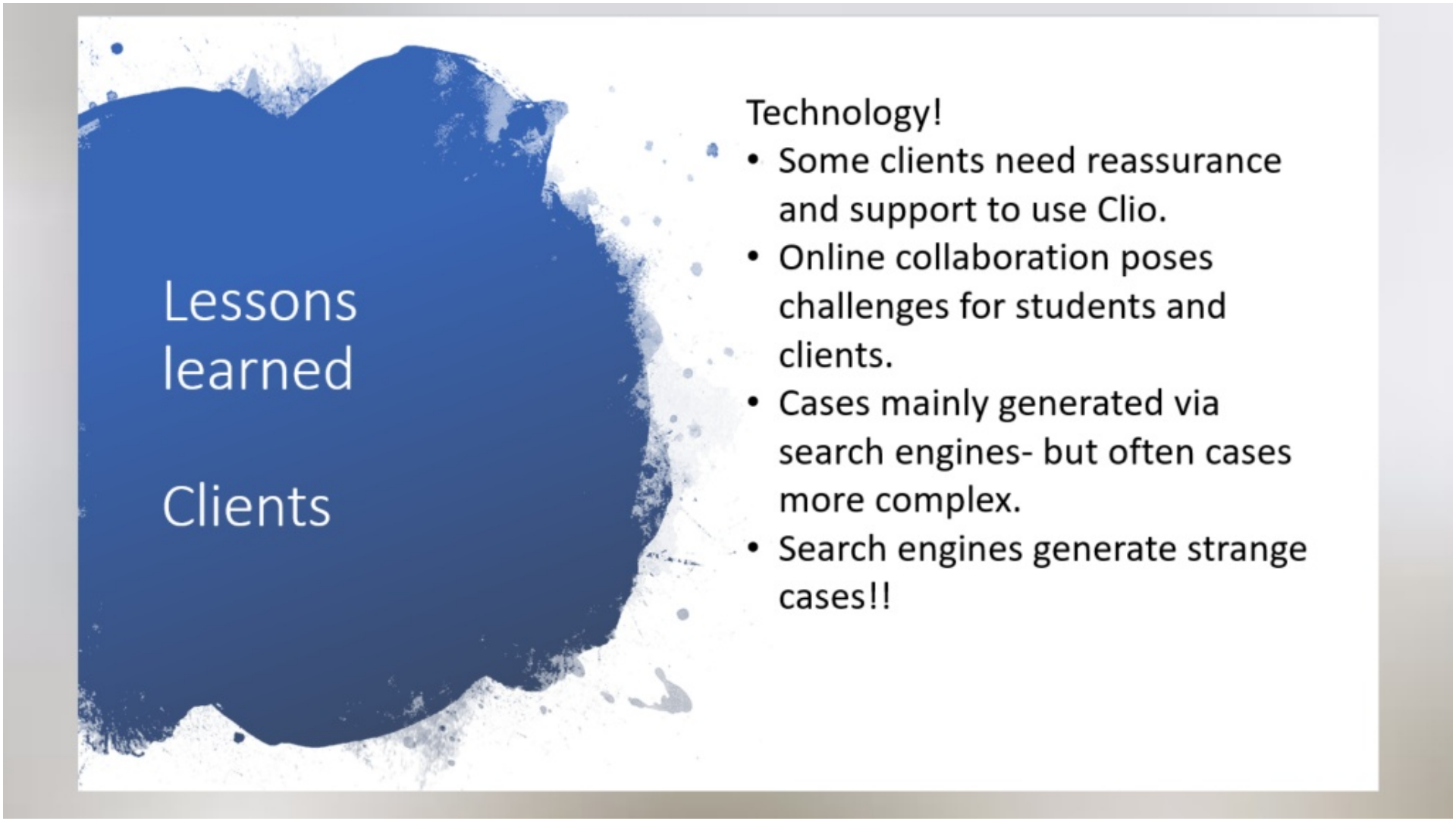





Slack - BPP Enterprise Clinic
BPP Enterprise ...
angela_cahill
Jump to...
Threads
Channels
announcements
general
london_clinic
manchester_clinic
marketing
skype_clinic
london_trello_updates
manc_clientupdates
+ Add a channel
Direct Messages
Slackbot
angela_cahill (you)
Camran Goorani-Nejad
Maxie
+ Invite people
Apps
trello
#manchester_clinic
3 | 0 | Add a topic
Search
Tuesday, May 21st
Camran Goorani-Nejad 12:35 AM
Hi @angela_cahill i've got an update regarding S ; she has confirmed her availability for 6pm on the 30th & has sent in her documents. Pending her consent form, which i'll email her about in the morning, she's good to go.
Regarding June's clients; I have confirmed with LTS that G K will be available to assist S on the 13th with a translator via Skype. Should I still send Mr. M an in-person Appointment Letter but mention the facility of a Kurdish translator on Skype? Am I correct in thinking this would be still preferable for our purposes to a Skype appointment?
Thanks @Maxie for offering to help set up Junes' appointments. If I give the 13th to S and the 27th to D , would you be ok arranging D for the 20th?
angela_cahill 9:13 AM
Great, thanks Camran - yes, let's get the client into the office and have G join via Skype.
Maxie 9:57 AM
Sure @angela_cahill I'll handle the 20th
angela_cahill 11:52 AM
@Camran Goorani-Nejad - re S documents, can you save them to Intralinks with names describing what they are and ask S to bring the originals with her?
angela_cahill 2:43 PM
@Camran Goorani-Nejad - please could you ask the current advisors for June whether they would like to swap out their place for one of the new advisors (assuming the new advisors have indicated availability for those dates)? Ideally let's get this sorted over the next week so we can get calendar appointments in their diaries. Thanks
Camran Goorani-Nejad 3:49 PM
Hi @angela_cahill I have renamed S documents, D will confirm this eve is she can attend the 27th June. I have also arranged for one of our old Student Advisors to give way for J . M & S (both new) have agreed to take the 30th May. This leaves only G without an appointment. I have emailed A to ask if she wouldn't mind letting G take her slot (edited)
angela_cahill 3:51 PM
@Camran Goorani-Nejad - you're on fire! Thanks very much for all your help. This is great!
Camran Goorani-Nejad 4:22 PM
Thanks Angela, your very welcome
Wednesday, May 22nd
Message #manchester_clinic


Boards
Trello
This version of Chrome is not supported. Please upgrade to a supported version.
Enterprise Clinic Test Board
Personal
Private
Invite
Show Menu
Templates
[DATE] Client Name
Add another card
To be Archived
[T - 07.05.19] Arthur Dent @ 6pm
Add another card
May
[M - 20.05.19] Ford Prefect
[M - 20.05.19] Dirk Gently (6pm)
June
[DATE] Client Name
[DATE] Client Name
Add another card
August
Add a card
[M - 20.05.19] Dirk Gently (6pm)
In list May
LABELS
Advisors ready
Description
Edit
Students: Jacqueline and Celina
Supervising Solicitor: [NAME]
Pre-Appointment Checklist
Hide completed items
Delete
Confirm clinic date with client
Calendar invitations updated to include client name
Appointment letter requesting further docs drafted
Appointment letter sent
Intralinks Files Set Up
CiS Form uploaded
Appointment letter uploaded
Template letter of advice and attendance note uploaded
Angela: Do Students have access to Intralinks?
Chased for Consent Form and Further Docs
Consent letter received
Consent letter uploaded
AC: Booked Room?
AC: Emailed Students asking for questions?
AC: Sent intro email to supervising solicitor?
AC: Emailed checklist for letter after the appointment?
ADD TO CARD
Members
Labels
Checklist
Due Date
Attachment
POWER-UPS
Get Power-Ups
ACTIONS
Move
Copy
Watch
Archive
Share


Lessons learned
Students
Practice makes perfect!
• Two manuals plus a recorded Adobe connect session on how to use Clio.
• Students undertake a simulated case before moving to the live clinic.
• Mock interview- check use of Adobe connect & prepare- students interview in groups but not in the same location.
• Need procedures, standards, & good communication
• Checklists, checklists, checklists


Lessons learned
Clients
Technology!
• Some clients need reassurance and support to use Clio.
• Online collaboration poses challenges for students and clients.
• Cases mainly generated via search engines- but often cases more complex.
• Search engines generate strange cases!!

Giving advice via remote access systems

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&

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