

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 Current Counsel:

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

You will find the form here:

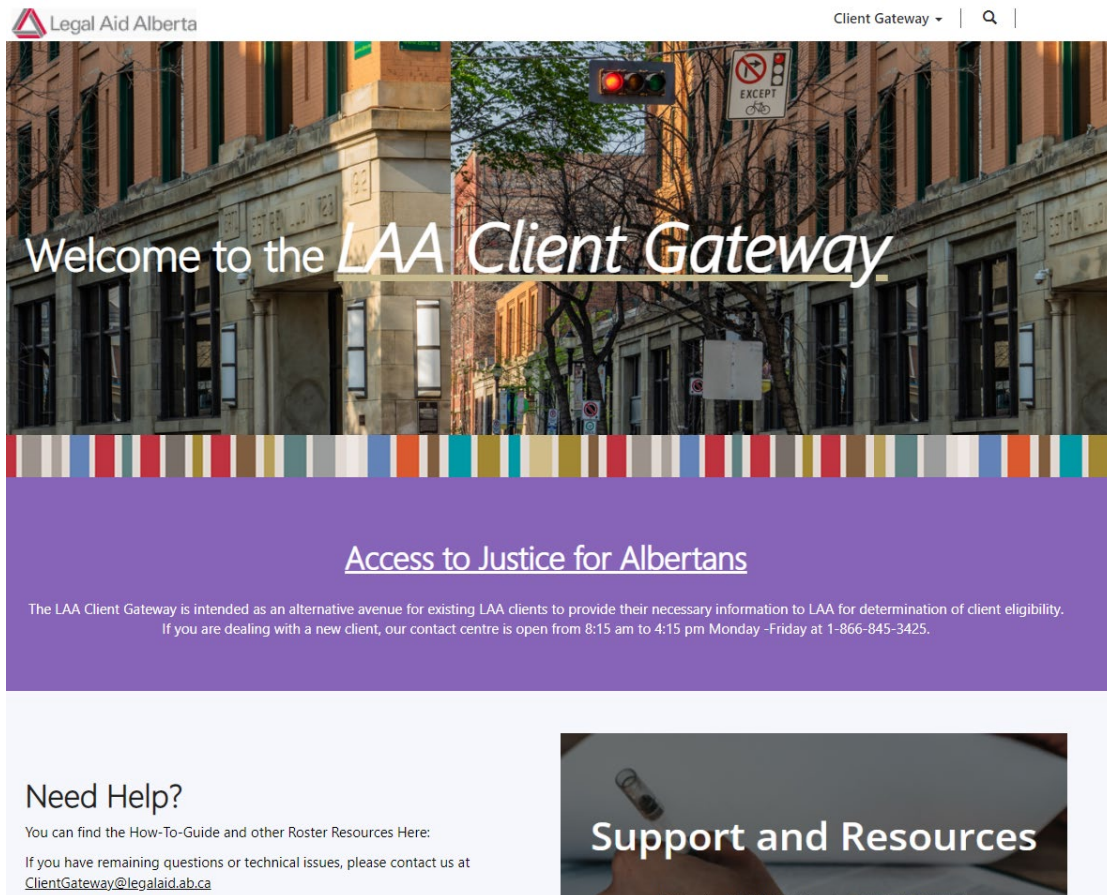
<https://laaportal.powerappsportals.com/client-gateway/>

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

➤ Step 1

Navigate to the Client Gateway Landing Page: [Client Gateway - Custom Portal \(powerappsportals.com\)](https://powerappsportals.com)

You will land here:



The screenshot shows the LAA Client Gateway landing page. At the top left is the Legal Aid Alberta logo. At the top right, it says "Client Gateway" with a dropdown arrow, a search icon, and a vertical line. The main header features a photograph of a city street with a traffic light and a "NO EXCEPT" sign. Overlaid on the photo is the text "Welcome to the LAA Client Gateway". Below the photo is a purple banner with the text "Access to Justice for Albertans". Underneath the banner, a paragraph states: "The LAA Client Gateway is intended as an alternative avenue for existing LAA clients to provide their necessary information to LAA for determination of client eligibility. If you are dealing with a new client, our contact centre is open from 8:15 am to 4:15 pm Monday -Friday at 1-866-845-3425." Below this is a "Need Help?" section with the text: "You can find the How-To-Guide and other Roster Resources Here: If you have remaining questions or technical issues, please contact us at ClientGateway@legalaid.ab.ca". To the right of this section is a "Support and Resources" section with a background image of a hand holding a pen over a document. At the bottom of the page, there is a navigation bar with links: "Home / Roster Resources / Support and Resources".

➤ **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

For example, John Smith's username would likely be jsmith@legalaid.ab.ca



Client Gateway | 🔍 | **Sign in** | Agency Sign in

Note: If this is your first login, review the information on Multifactor Authentication later in this document.

➤ **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. The following steps will take you through the fields to be entered one by one.

➤ **Step 4:**

Specify whether you are currently working a Duty Counsel shift or are a client's current counsel by selecting the Form Type (the 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

Next, 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 three names of lawyers you would like LAA to assign to your case and LAA will try to 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 (1-866-845-3425) to avoid any issues.

This is meant to be a way for 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 three points that need to be covered within the online form itself, and you can simply 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 and Contact Information.

First Name *

Last Name *

Date Of Birth *



It is very important that you try to get a phone number OR an email address from the client and fill 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 *

Provide a telephone number

Email *

If the client has a fixed address, the city field is mandatory. If the client does not have a fixed address, this can be changed to "No" and the field will no longer be required.

Does client have a fixed address?

No Yes

Address

City *

Contact Notes

You can also add a comment about the client's contact information (for example, "Mom's cellphone number").

➤ Step 9:

Are new or updated financials required? This section will always default to "Yes". If a financial update is not required, it can be changed to "No" and all financial information fields will be hidden.

NOTE: A financial update is required every two years. You can ask the client when they last completed an assessment with LAA; if it was more than two years ago, or they did not previously qualify, a financial update will be required. If the client has never applied with LAA, financial details are required.

Family size includes the client, their spouse and any dependents who are younger than 18 or who live with the client at least 40% of the time (3 days a week).

Marital Status: Select from the dropdown list.

Are new or updated financials required?

No Yes

Family Size (including the client) *

Marital Status *

For “Single” or “Separated”, the client’s 30 Day/12 Month **net** income will be mandatory. For “Common Law/Married”: the client AND their partner’s 30 Day/12 Month **net** income will be mandatory.

Allowable income is defined in LAA’s Rules and Policies. We need to capture how much money the client receives every month and year. We include income sources such as:

- Full-time or part-time employment
- Income support (such as Alberta Works) or Employment Insurance
- Child support or spousal support
- Disability or WCB payments
- Inheritance or sale of assets

You can use the following as a script:

1. How many people are in your family?
2. Are you married?
3. Are you on AISH? (*If yes, skip to question 6.*)
4. What was your take-home income for the last 30 days (estimate)?
5. What was your take-home income for the last 12 months (estimate)?
6. Do you have any assets?

Note that if there are no children, there is no need to ask about deductions.

If the client's marital status is Common Law/Married, document their partner's 30-day and 12-month **net** income in the corresponding fields.

Client 30 Day Net Income *

Client 12 Month Net Income *

Partner 30 Day Net Income *

Partner 12 Month Net Income *

Client on AISH? *

No Yes

If the client is on AISH, income details are not required. Once "Yes" is selected, the income fields will be hidden.



Does client have assets: The equity value is determined by the value of the asset **minus** the balance owing. For example, if the client owns a house valued at \$100,000, but owes \$50,000, the equity value you would enter would be \$50,000.

Does client have assets?

No Yes

(Reminder: at least one field must be completed. If no assets, select 'No' above.)

Real Estate Equity Value *

Vehicle Equity Value *

Liquid Assets Equity Value *

Does client have monthly deductions?

No Yes

(Reminder: at least one field must be completed. If no deductions, select 'No' above.)

Monthly Child Support Payment Amounts *

Monthly Spousal Support Payment Amounts *

Monthly Child Care Payment Amounts *

Does client have monthly deductions: Enter the fixed monthly amount the client pays, if applicable.

Only one of the fields in each section must be filled out. If there are no assets or deductions, simply select "No" and the fields will be hidden.

You can also add a comment about any other details related to the client's financial situation.

Financial Notes

➤ **Step 12:**

Is the client in custody or being held in custody on other charges?

If “Yes” is selected, “ORCA Number” and “Custody Location” boxes will appear. Custody Location is mandatory, and you can select or search for the client’s custody location.

In Custody?

No Yes

ORCA Number

Custody Location *

ERC - Edmonton Remand Centre ▼

- Select
- Bowden Institution
- Calgary Correctional Centre
- Calgary Correctional Centre- Spy Hill
- CRC - Calgary Remand Centre
- Calgary Young Offender Centre
- Canada Border Service Agency
- Drumheller Institution
- Edmonton Institution
- Edmonton Institution for Women
- ERC - 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
- Calgary Foothills Hospital

➤ **Step 13:**

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

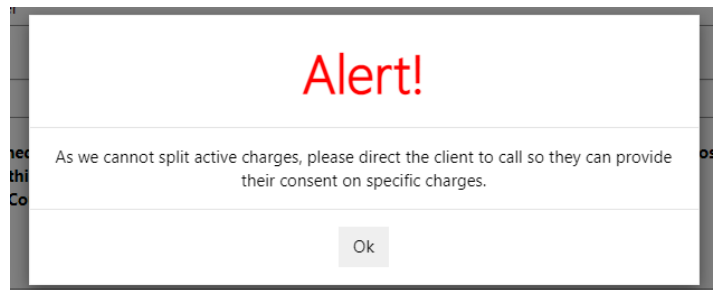
Help Needed On All Active Charges?

No Yes

You can also assist the client by selecting multiple locations where they may have active charges, as discussed below.



If the client does not want LAA help on all active issues, select “no” and a pop up will appear asking you to direct the client to call so that they can provide their consent on specific charges.



➤ Step 14:

Provide some basic charge information and select **all locations** where the client has active charges (that you know of).

Next Court Date
 

Docket Number

Court Location

Courtroom

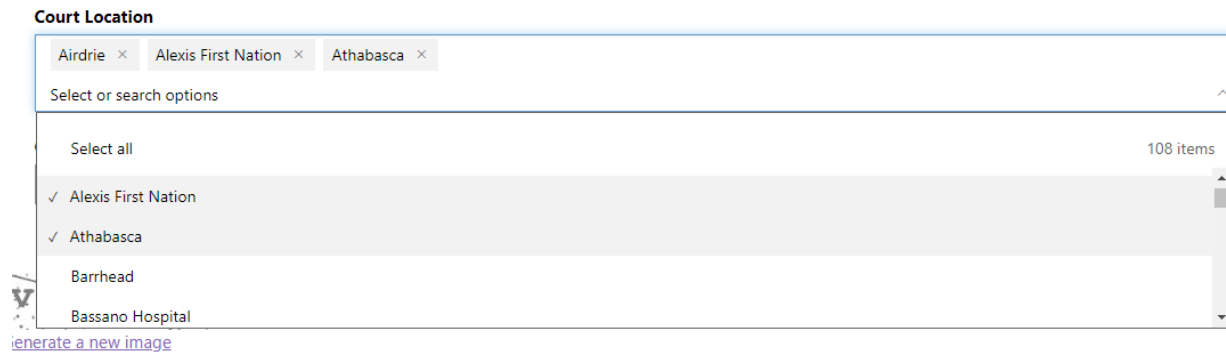
General Comments

You only need to provide the soonest court date and one docket number. This is simply used to validate the correct 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 if all active court locations are selected, as this helps ensure that charges are not missed. However, if you don't know, don't worry; simply select the Court Location you are aware of.

You can select multiple locations:



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

➤ Step 15:

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 the submission of the form to the client's file moving to the next step!

The intake staff will typically complete a series of steps when helping a client 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. This step includes updating preferred counsel.
2. Ensure financial information has been collected in the past two years.

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 staff Duty Counsel.
 - 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 assigned if no preferred counsel is chosen).

If there are issues with the application as submitted:

- Contact ClientGateway@legalaid.ab.ca for questions on submitted applications or for technical or procedural questions.
- If the client's financials are over two years old and financial details are not provided in the form, 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 this happen?

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

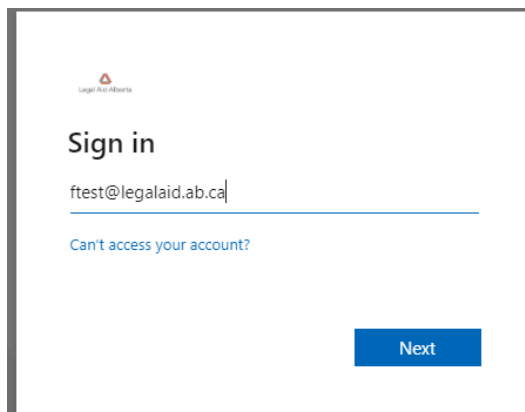
Why is this happening?

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

➤ Step 1:

Navigate to the Client Gateway page ([Client Gateway](#)) and select “Sign In” at the top right of the screen. Microsoft Edge is the recommended browser.

You will be redirected to the Microsoft Login Page. Enter your **full Legal Aid Alberta username**. This is called a UPN and looks like an email address (e.g. msmith@legalaid.ab.ca).



Legal Aid Alberta

Sign in

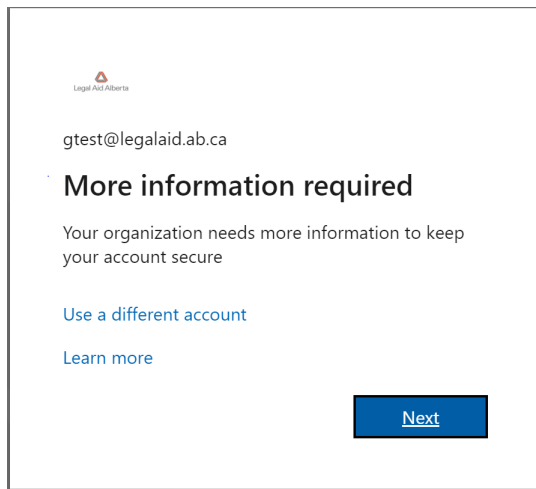
ftest@legalaid.ab.ca

[Can't access your account?](#)

Next

➤ Step 2:

After clicking Next, enter your Legal Aid Alberta password. You will see a message indicating “More Information Required”. This is the Multifactor Authentication (MFA) prompt.

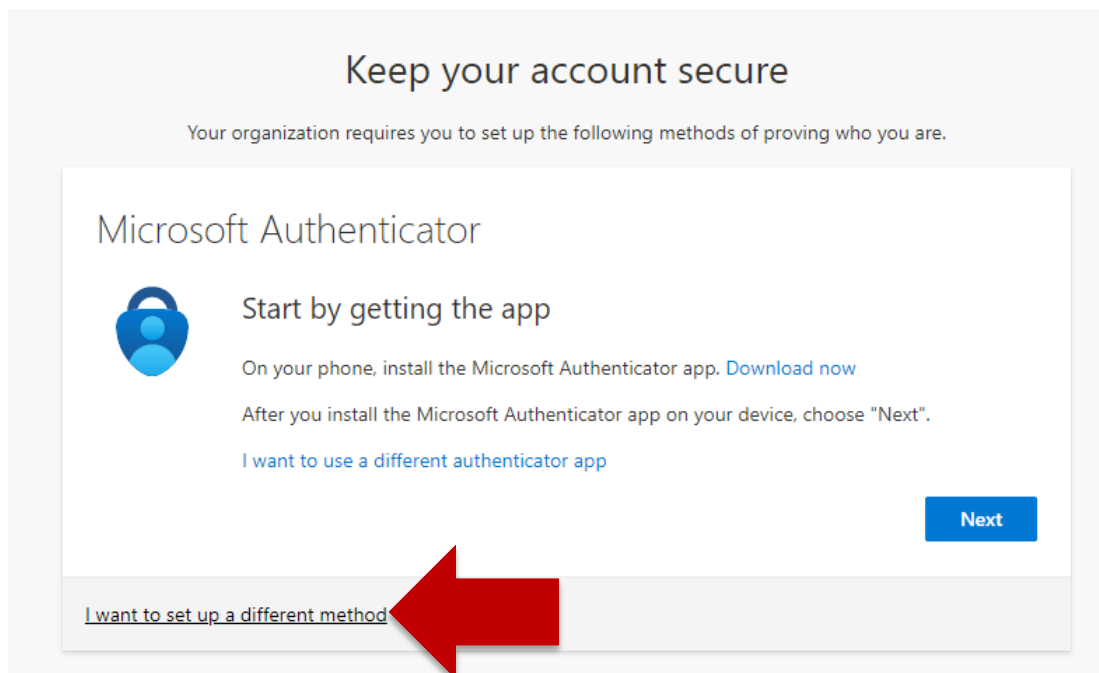


Click Next and you will be redirected to MFA registration at mysignins.microsoft.com. You will be asked to setup MFA by using the Authenticator app or via a text or call to your mobile device.

➤ Step 3:

If you have the Authenticator app or wish to set it up, click Next and follow the prompts.

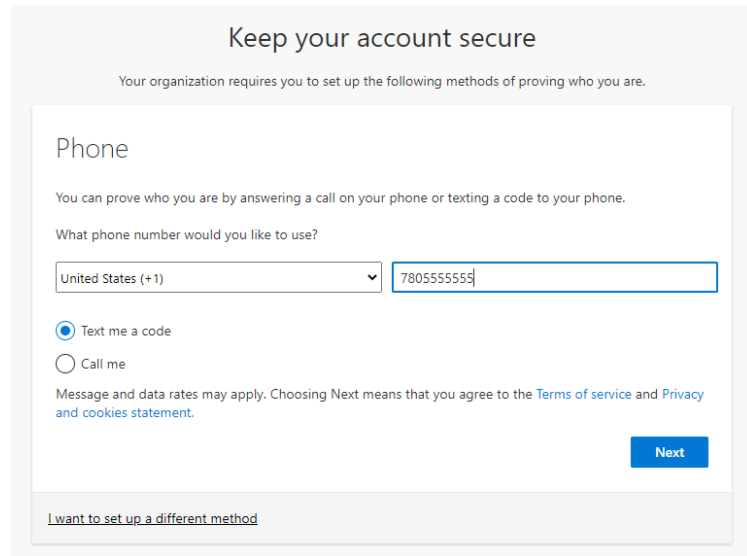
If you want to have MFA codes sent to your phone via text message or phone call, select "I want to set up a different method". In the following steps, we will have a code texted to the phone.



Under "Choose a different method, select Phone.

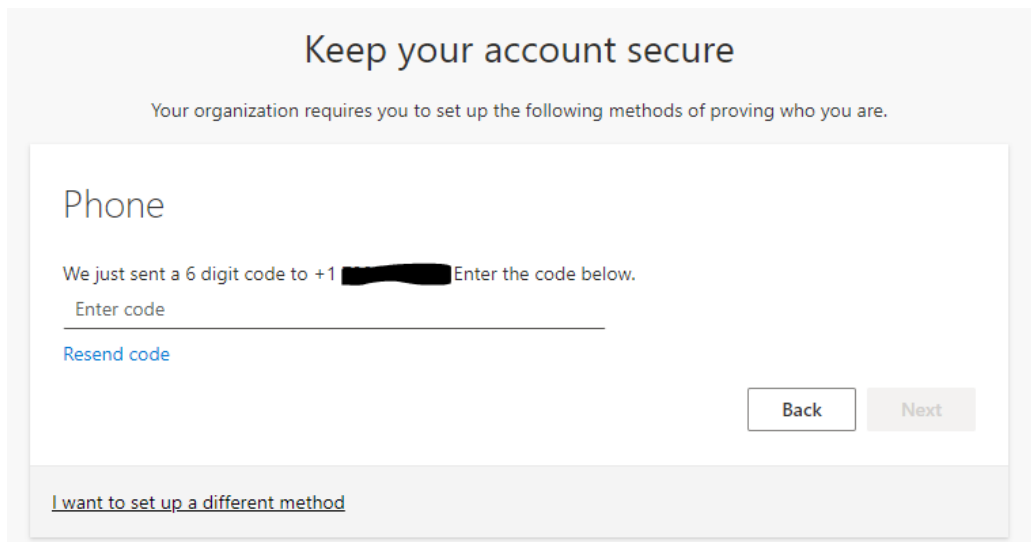
➤ **Step 4:**

On the next screen, provide your mobile phone number. Again, you can choose to receive the code via text or a phone call. When you click Next, the code will be sent.

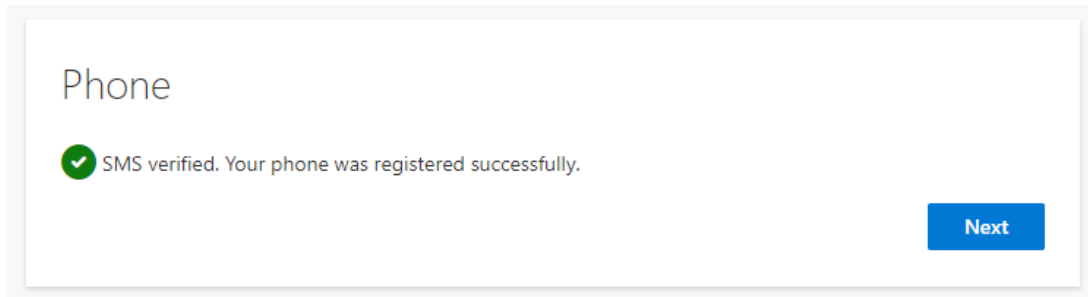


➤ **Step 5:**

Enter the code you received and click Next.



A message will appear indicating 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 every 90 days.

Further Information on **Multifactor Authentication**

- Microsoft's article on setting up MFA:
[Set up your Microsoft 365 sign-in for multi-factor authentication - Office Support](#)
- MFA codes sent via telephone call can be sent to landlines.
- You can also use the following link to register for MFA: <http://aka.ms/mfasetup>