

# Duty Counsel Portal


## Portal Navigation

### Accessing DC Portal

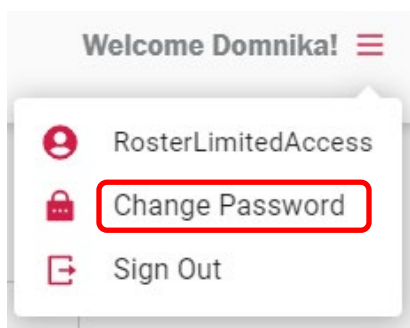
Access the DC Portal site via the link at <https://legalaid.ab.ca/roster-resources/>.

- Username = combine your Lawyer Portal username followed by @legalaid.ab.ca
- Password = your CURRENT Lawyer Portal password
- Multifactor Authentication is required.

### Change Password/Sign Out

You can change your password or sign out within the DC Portal by selecting  in the top right corner.

The following drop down will appear:



Please note, changing your password in DC Portal will change it for all your Legal Aid accounts, including Lawyer Portal.

## Client Search

When you log into DC Portal, the landing page is the 'Search Client Files' Dashboard.

### Search Client Files

Date of Birth

First Name

Middle Name

Last Name

To complete a search for a client, there are multiple ways to filter your search. You can enter any variation of date of birth or , first, middle or last name.

**Note:** You must enter the day and month in **double digits** for the system to recognize it—that is, with leading zeroes (01/01/1987 not 1/1/1987).

## Search Results

Once you have submitted your search, you will see a number of results, sorted by last name. If you get too many results, you can add additional information to narrow the search.

### Search Client Files

Date of Birth

First Name

Middle Name

Last Name

Total No. of Items : 6

Record Type	First Name	Middle Name	Last Name	Date of Birth	Alias 1	Alias 2	Alias 3	Email
Portal	Test	LAA	Client	04-Mar-1992				
CRM	Test		Client	06-Mar-2018				
CRM	test	Ike	client	01-Apr-2024				
CRM	Test		Client	02-Feb-2001				
Portal	Kendyll	Client	Test	19-Jun-1988				Test@email.com
Linked	LAA	Client	Test	16-Apr-1991				laatest@noemail.com

## File Preview

To ensure you are opening the correct file from the result list, you can preview the file without fully opening it. To do this, you will click on the file you want to review.

### Search Client Files

Date of Birth

First Name

Middle Name

Last Name

Client File CF-19 : Test Client 04-Mar-1992

#### Client Basic Information

First Name * <input type="text" value="Test"/>	Middle Name <input type="text" value="LAA"/>	Last Name * <input type="text" value="Client"/>
Date of Birth * <input type="text" value="04-Mar-1992"/>	Client Alias 1 <input type="text"/>	Client Alias 2 <input type="text"/>
Client Alias 3 <input type="text"/>	Indigenous Ancestry <input type="text" value="Declined to Ask"/>	

#### Client Contact Information

Email <input type="text"/>	Phone Number <input type="text"/>	Mobile Number <input type="text"/>
Preferred Method of Contact <input type="text" value="Any"/>		

#### Client Financial Information

Financially Eligible <input type="text" value="Yes"/>	Family Size <input type="text" value="2"/>	Last 12 Months Income (\$) <input type="text" value="72,219.96"/>
Last 30 Days Income (\$) <input type="text" value="6,018.33"/>	Total Equity Value (\$) <input type="text" value="0"/>	Last Assessment Date <input type="text" value="05-Oct-2022"/>

Financial Eligibility Guidelines

From the above review window, you can:

1. Create a **New Client File**.
2. **Open the existing file** and update.
3. **Close** and return to search results.

*The extra information that appears is to help you confirm that you have the right client. If the client's contact information is outdated, you can update it in the Client Details view after you open the Client File.*

## Client File

### Opening an Existing Client File

[Open Client File](#)

When you select “Open Client File” for a file that already exists in CRM or Portal, you will be brought to the Recent Activity View. Make sure you update the client information in the [Client Detail View](#) (see page 6) as it auto-populates to all other activities in DC Portal.

### Recent Activity View

This view allows you to see all the activities, statuses and outcomes on the file from Portal and CRM (if applicable) in chronological order.

Search Client > Recent Activities: Test, LAA + ... [View Details](#) [Cancel](#)

#### Client File

**Client Information** [Financial Eligibility Guidelines](#)

<b>First Name *</b> LAA	<b>Middle Name *</b> Client	<b>Last Name *</b> Test	<b>Date of Birth *</b> 16-Apr-1991	<b>Indigenous Ancestry</b> Declined to Ask	<b>Email</b> laatest@noemail.com
<b>Phone Number</b>	<b>Mobile Number</b> (778) 552-4141	<b>Preferred Method of Contact</b> Any	<b>Financially Eligible</b> Yes	<b>Family Size</b> 2	<b>Last 12 Month Income(\$)</b> 17,000
<b>Last 30 Days Income (\$)</b> 1,545.63	<b>Total Equity Value (\$)</b> 2,000	<b>Last Assessment Date</b> 14-May-2024			

**Client Notes** [New Note](#)

Note Text	Created On	Created By
Note about the client - May 14, 2024	14-May-2024	Domnika Socherbakov

**Recent Portal Activities**

Created On	Activity	Status	Next Court Date	Assigned To	Outcome	Dockets
14-May-2024	Client Gateway	New	28-May-2024			2422256398P1
14-May-2024	Client Gateway	Form Entered Succ...	12-Jun-2024			2411114127P1
14-May-2024	Client Gateway	New - Update				2405142024P1

For submitted Client Gateway forms, you can view real-time statuses and outcomes. The statuses you may see are:

- **New:** the Client Gateway form has just been submitted and is not yet being worked on.
- **New - Update:** An updated Client Gateway form has just been submitted and is not yet being worked on.
- **Entry in Progress:** Intake Officers are currently entering information into our system.

- **Form Entered Successfully:** The matter has moved to the next step (DC Triage or Offer to Counsel).
- **Financially Ineligible:** The application has been processed, but the client has been deemed financially ineligible.
- **Duplicate Form:** No new information to process or add to client file.
- **Call Back Required:** The client is required to phone in to provide additional information.

## Client Information

The Client Information window provides a snapshot of the client’s information, including their name, contact information, and financial eligibility status.

**Client Information** Financial Eligibility Guidelines

<b>First Name *</b> Blair	<b>Middle Name *</b> Cornelia May	<b>Last Name *</b> Waldorf	<b>Date of Birth *</b> 14-Jan-1992	<b>Indigenous Ancestry</b> No	<b>Email</b>
<b>Phone Number</b>	<b>Mobile Number</b> (555) 410-7878	<b>Method of Contact</b> Any	<b>Financially Eligible</b> Yes	<b>Family Size</b> 1	<b>Last 12 Month Income(\$)</b> 0
<b>Last 30 Days Income (\$)</b> 0	<b>Total Equity Value (\$)</b> 80,000	<b>Last Assessment Date</b> 16-May-2023			

Client Notes	Created On	Created By	Modified On	Modified By
<b>Note Text</b>				
Second note about the client - testing testing testing. EDIT to the Note a few minutes later - NS	16-May-2023	Domnika Scherbakov	16-May-2023	Domnika Scherbakov
Deleted note contents but not entire note?	16-May-2023	Domnika Scherbakov	16-May-2023	Domnika Scherbakov

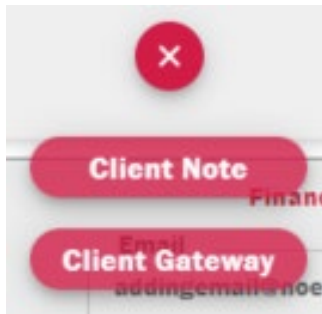
Recent Activities						
Created On	Activity	Dockets	Status	Next Court Date	Assigned To	Outcome
16-May-2023	JP Bail Outcome	fdfdfff	Closed			Charges Withdrawn
	Agency Request	DocketGG123	Closed		Dan Doe	Resolved
	Agency Request	DocketGG678	Open			
	Agency Request	DocketGG456	Open		Lisa Couto	

## Client Notes

The Recent Activities view contains all past notes from the client’s file.

## File Actions

From the Recent Activities view, select the  icon and a drop down will appear with File Actions:



[Client Note \(see page 9\)](#)

[Client Gateway \(see page 9\)](#)

## Client File Details View

The client's contact information can be updated from the Client File Details view.

To access the Client File Details view, select "View Details."

**It is imperative that you update the contact information, especially if submitting a Client Gateway form!**

Search Client > Client File: Blair > Recent Activities

**Client File** + ... **View Details** Cancel

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**Client Information** Financial Eligibility Guidelines

First Name * Blair	Middle Name * Cornelia May	Last Name * Waldorf	Date of Birth * 14-Jan-1992	Indigenous Ancestry No	Email
Phone Number	Mobile Number (555) 410-7878	Method of Contact Any	Financially Eligible Yes	Family Size 1	Last 12 Month Income(\$) 0
Last 30 Days Income (\$) 0	Total Equity Value (\$) 80,000	Last Assessment Date 16-May-2023			

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**Client Notes**

Note Text	Created On	Created By	Modified On	Modified By
Second note about the client - testing testing testing. EDIT to the Note a few minutes later - NS	16-May-2023	Domnika Scherbakov	16-May-2023	Domnika Scherbakov
Deleted note contents but not entire note?	16-May-2023	Domnika Scherbakov	16-May-2023	Domnika Scherbakov

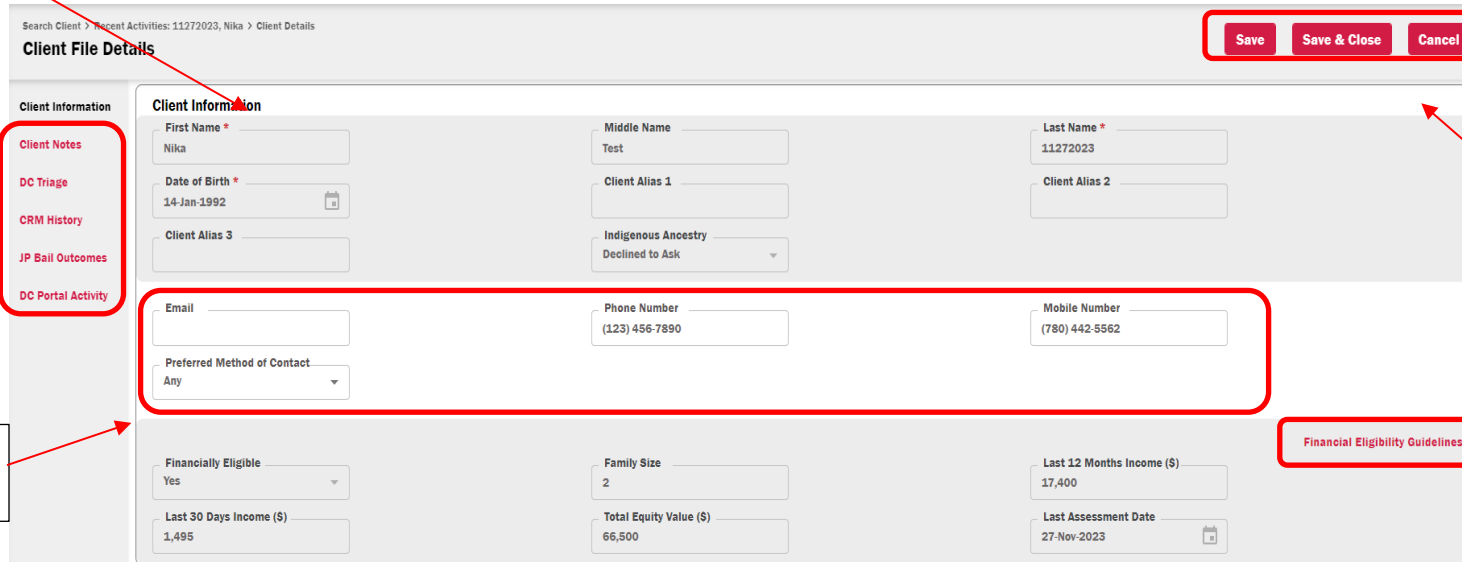
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**Recent Activities**

Created On	Activity	Dockets	Status	Next Court Date	Assigned To	Outcome
	Agency Request	DocketGG123	Open		Dan Doe	
	Agency Request	DocketGG678	Open			
	Agency Request	DocketGG456	Open		Lisa Couto	

The “View Details” page is where the client’s contact information can be updated. Anything in dark grey cannot be amended, to prevent corruption of client data.

Although the information outlined in the Detail View is similar to the Recent Activities, it is presented in a different layout. Some information is greyed out, while other information is not; if the information is not greyed out, it can be edited or updated.



Search Client > Recent Activities: 11272023, Nika > Client Details

**Client File Details**

Save Save & Close Cancel

**Client Information**

Client Information

Client Notes

DC Triage

CRM History

JP Bail Outcomes

DC Portal Activity

First Name \* Nika

Middle Name Test

Last Name \* 11272023

Date of Birth \* 14-Jan-1992

Client Alias 1

Client Alias 2

Client Alias 3

Indigenous Ancestry Declined to Ask

Email

Phone Number (123) 456-7890

Mobile Number (780) 442-5562

Preferred Method of Contact Any

Financially Eligible Yes

Family Size 2

Last 12 Months Income (\$) 17,400

Last 30 Days Income (\$) 1,495

Total Equity Value (\$) 66,500

Last Assessment Date 27-Nov-2023

Financial Eligibility Guidelines

Hyperlinks to file components

Save  
Save & Close  
Cancel

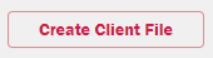
Hyperlink to view FEG chart

Contact fields that can be updated

## Creating a New Client File

If the client does not appear in the search, this means that they have never applied to Legal Aid before. You can only create a new file if you complete a search for your client first. This is intentional, to avoid duplication of files and to ensure CRM information is captured when available.

If your search does not return the result you are looking for:

1. Select the “Create Client File” button. 
2. Fill out the blank file as thoroughly as possible (see below).

Search Client > Client File: > View Details

**Client File Details** Save Save & Close Cancel

**Client Information**

[Client Notes](#)

[Client Interactions](#)

[CRM History](#)

[JP Bail Outcomes](#)

[DC Portal Activity](#)

**Client Information**

First Name * <input type="text"/>	Middle Name <input type="text"/>	Last Name * <input type="text"/>
Date of Birth * <input type="text" value="14-Jan-1992"/> <small>📅</small>	Client Alias 1 <input type="text"/>	Client Alias 2 <input type="text"/>
Client Alias 3 <input type="text"/>	Indigenous Ancestry <input type="text"/>	
Email <input type="text"/>	Phone Number <input type="text"/>	Mobile Number <input type="text"/>
Preferred Method of Contact Any <input type="text"/>		

**Financial Eligibility Guidelines**

Financially Eligible <input type="text"/>	Family Size <input type="text"/>	Last 12 Months Income (\$) <input type="text"/>
Last 30 Days Income (\$) <input type="text"/>	Total Equity Value (\$) <input type="text"/>	Last Assessment Date <input type="text" value=""/> <small>📅</small>

**Client Notes**

\*\* Save the new Client File to add new Notes \*\*

**Client Interactions**

Form Status	Docket Number	Next Court Date	Assigned To	Court Location	Court Room	Assesment Outcome
No rows						

Total No. of Items : 0

3. Save your work.

**Note:** "Save & Close" will return you to the search screen. You must select "Save" to continue working on the file after creating it.



## File Actions

From here you will be able to add or update file actions depending on your interaction with the client.

## Client Notes

Virtual file keeping should take place at every interaction with the client. This helps Duty Counsel deal with matters and see what has been done for this client in the past.

1. Click "New Note".
2. Add information.
3. Save and close.



Client Notes

Note Text

It is imperative that you make notes **every time** you pass by or touch the DC Portal file.

New Note

Total No. of Items : 0

Created On	Created By	Modified On	Modified By
No rows			

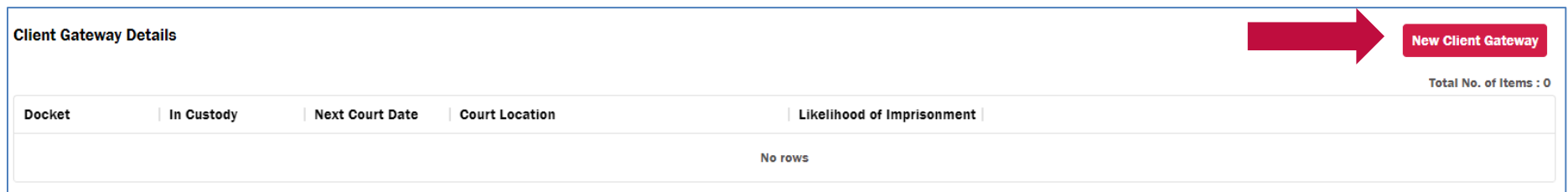
## Client Gateway Form

### Submitting a Client Gateway form

A Client Gateway form can be submitted if the client has new criminal charges in Alberta. To submit a Client Gateway form, the client must already exist in CRM or in DC Portal. Once the form is submitted, the status will be updated in DC Portal in real time and can be viewed in [Recent Portal Activities](#) (see page 4).

**Note: Please advise the client they may be contacted by LAA if further information is required.** The form may be submitted by a lawyer; the eligibility decision will be made by Client Services. Clients who have questions about eligibility decisions should be advised to call the contact centre at 1-866-845-3425.

1. Select "New Client Gateway":



Client Gateway Details

New Client Gateway

Total No. of Items : 0

Docket	In Custody	Next Court Date	Court Location	Likelihood of Imprisonment
No rows				

In this example, the phone number and email are greyed out. Please return to the Client Detail section to update!

The address fields can be edited within the Gateway form once toggled to "Yes".

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

Does client have a fixed address?  
 No  Yes

Address  City

2. Complete fields as applicable:

- a. **Form Type** – select the form type based on your shift:
  - i. Current Counsel
  - ii. In Court DC Form
  - iii. JP Bail Form

Form Type \*

In Court DC Form ▼

- b. There are three main points that the Client needs to understand. You must confirm that they consent before you can check "Yes".

**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 Cons...

No ▲

No

Yes

N/A

This option must be set to "Yes" or "N/A" to submit the form.

The following can be used as a script:

“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.

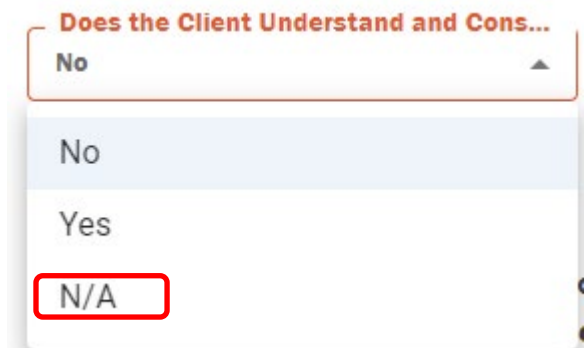
Do you understand?”

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.

**Note:** If a Client Gateway form is submitted, and you realize that there is an error or that an update is required, you may submit a new form.

In these instances, use the ‘N/A’ option for client consent. This will allow you to make the necessary corrections without needing to obtain additional consent from the client.

Examples of when you may need to use this option include an incorrect docket, incorrect court location, forgetting to indicate LOI or omitting Preferred Choice of Counsel.



Does the Client Understand and Cons...

No

No

Yes

N/A

- c. **Contact Information:** In the example below, phone and email are greyed out. This is because the client’s phone number and email must be updated in the Client File Details View. If client has a fixed address, or you have additional info regarding contacting the client, they can be added here.

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

Does client have a fixed address?  
 No  Yes

Address  City \*

Contact Notes

- d. **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.

New or updated financial information is required if:

- A client’s last financial assessment was completed over 24 months prior.
- There is a change to a client’s financial situation.

**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. 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.

Family Size (including the client) \*

Marital Status \*

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.

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<b>Client on AISH?</b>	
No <input type="radio"/> Yes <input checked="" type="radio"/>	

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

**Financial notes:** Use this section to add any other details related to the client's financial situation.

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 (\$) \*

- e. **Preferred Counsel:** LAA respects a client's Choice of Counsel. For that reason, it is important that you have advised the client that they can provide the names of preferred lawyers if they wish to do so. Alternatively, they can waive their Choice of Counsel. If the client has a preferred lawyer, click the toggle to change from "No" to "Yes" and enter the preferred counsel's name.

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 the Client have Preferred Counsel?

No  Yes

Preferred Counsel \*

- f. **Indigenous Ancestry:** Asking clients if they self-identify as Indigenous allows for LAA to better understand clients' legal needs and improves our ability to provide appropriate services.

**Does the client self-identify as Indigenous?**

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

Indigenous Ancestry

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

- g. **In Custody:** 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. If the client is in the Edmonton or Calgary Remand Centres you can search for ERC or CRC.

In Custody?  
No  Yes

ORCA Number

Custody Location \*

- h. **Help Needed on all Active Charges?** Does the client want help on all outstanding charges? The default answer is yes.

**Help Needed on All Active Charges?**

No  Yes

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.

**Alert!** ✕

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

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**Yes**

i. **Confirm LOI:**

Can you confirm a reasonable Likelihood of Imprisonment for the charges/court locations selected below:

No  Yes

If “No” is selected, the following question about obtaining disclosure will be visible.

j. **Disclosure for DC Triage**

If the client’s matter needs to be reviewed by the Staff Duty Counsel Team for service eligibility, does the Client consent to DC ordering disclosure on their behalf?

(Reminder: if you cannot obtain consent for disclosure, the DC Triage Lawyer will need to obtain consent which may delay review of their matter for LOI)

No  Yes

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

Next Court Date <input type="text"/>	Docket Number <input type="text"/>	Court Location <input type="text"/>
Court Room <input type="text"/>		

**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.



**I. Additional Comments:**

General Comments

When complete, hit "Submit" or "Submit & Close".

**Submit**

**Submit & Close**

**Cancel**