

# USES OF TECHNOLOGY IN CENTRALIZED TELEPHONE INTAKE AND DELIVERY SYSTEMS

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The Legal Services Corporation funds five programs that began operating centralized telephone intake and delivery systems in 1996.<sup>(1)</sup> The programs are:

- 1) Statewide Legal Services of Connecticut,
- 2) Legal Services Law Line of Vermont,
- 3) New Hampshire Legal Services (Legal Advice and Referral Center),
- 4) Northwest Justice Project (Coordinated Legal Education, Advice and Referral), and
- 5) Volunteer Lawyers Project of the Boston Bar Association (Legal Advocacy & Resource Center).

The Volunteer Lawyers Project serves a large urban area of the state. The other four programs are statewide.

Each of these programs, and many others around the country, have designed and implemented intake systems that result in improved access, better quality, more timely and more responsive services for a large number of clients.

We are including for this Conference a brief description of the programs' uses of technology in their intake and delivery systems. This summary is not meant to be exhaustive, but rather provides some examples of ways that programs are applying technology. In a later report, we will describe the operations of these five intake systems in more detail, discussing various approaches to client access, staffing, development of resource and educational materials, referrals, training, quality control, assessment, and client satisfaction.

We also include a list of resource persons, at the programs and at the Corporation, and encourage you to contact these persons.

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## **USES OF TECHNOLOGY IN CENTRALIZED TELEPHONE INTAKE AND DELIVERY SYSTEMS**

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### **Overview**

The following is an overview of centralized intake technology at five legal services programs:

All of the programs use local area networks that give their advocates access to the client intake program.

Three of the programs use Novell as their networking software, one uses Windows NT and one uses LANtastic. The programs using Novell software expressed satisfaction with its use.

Four of the programs use only pentium computers with at least 16 megabytes of memory, one program uses mostly 486 machines.

Most of the programs use Windows 95 as their operating platform. The program with 486 machines uses Windows 3.1.

Three of the programs use Novell GroupWise E-mail, one uses Microsoft Office E-mail, and one uses Microsoft Exchange E-mail.

Three programs use an E-mail system which is also used by other legal services providers in their state or area, allowing them to send and receive information without the use of conversion and decoding tools.

Staff from each program use headsets and store statistical and case information directly in the case management data base.

All of the programs give advocates the capacity to fax from their desks, although advocates tend to use traditional fax machines.

Each program uses a different client intake system, with two of the programs having developed their own systems, at a substantial expense. None of the programs has found the "ideal" software.

The programs tend to take a functional approach to computer training, stressing training on the client intake program since advocates use it much more than any other software application.

Two of the programs have part-time computer responsible people. In one case, the computer responsible person is full-time and also works with other programs. In the other case, the computer responsible person is also a case handler. The other three programs contract for computer maintenance but have someone on staff who does some troubleshooting.

Several programs give advocates access to automated legal research materials like statutes and regulations from their workstations. However, the programs tend to rely more on internally developed substantive law manuals.

One of the programs gives all advocates access to the Internet, and another is moving purposefully in that direction.

All of the programs use sophisticated telephone systems with an auto attendant and voice mail. One program purchased very sophisticated reporting software with its phone system that it uses in its day-to-day operations.

Most of the programs were either in the process of, or seriously considering, setting up a web site.

## **Statewide Legal Services of Connecticut, Inc. (SLS)**

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### **Local Area Network**

SLS operates a local area network ("network") using Windows NT. The network has 30 workstations which operate Windows 95. The Windows NT software requires that each work station be individually configured, which can be time consuming. Maintenance and periodic upgrades are also done at each

workstation. Network applications are loaded, configured and maintained at the file server only.

The SLS workstations were purchased from Gateway 2000 and have performed well. The workstations are Pentium 75 MHz machines with 16 megabytes of memory. They do not have CD ROM. The workstations do not require large hard drives because the software is loaded on the network. Each of the workstations is configured the same so that they can be interchanged if needed. SLS recommends that workstations be stored on portable computer carts so that they can be easily moved around. Staff have access to CD ROM, modems, and fax capability through the network.

## **Software**

SLS uses the Wamsutta Cases program for its intake, timekeeping and pro bono functions. Other applications used include Word, R&R Report Writer, Access and Excel. The SLS workstations came with Microsoft's Office Professional Suite, and they use the Office E-mail program for intra-office mail. SLS is just now beginning to explore the use of E-mail to communicate with other programs in Connecticut. SLS has the ability to provide staff with Internet access from their desk tops, but has chosen to load the software on selected machines. SLS uses a network fax software program that allows staff to fax cases and other documents from their work stations.

## **Training**

While SLS did not have much time to train staff to use the network, most already had experience on other types of networks. Staff had also received prior training in the use of the Cases program on stand-alone computers. SLS provided extensive training on the client intake application and basic training on other applications, including Windows 95, Microsoft Word and Office E-mail. Basic training included starting and exiting programs, using the mouse, creating

documents and handling E-mail. Additional training in these areas has been provided on an ongoing basis.

### **Legal Materials Available From Work Stations**

SLS provides staff with access to various legal materials in electronic form from individual work stations, including the Connecticut statutes.

### **Computer Responsible Person**

For the first six months of operation, SLS had a full time computer responsible person (CRP) in the office. SLS now has two full time CRPs on staff, with much of their time contracted out to other legal services programs. Just over 1/3 of a full-time equivalent CRP is required for SLS. The CRPs dedicate much of their time to network administration and training, while SLS staff handle other computer functions. The CRPs are not responsible for the operation of the telephone system.

### **Telephones**

When clients call SLS for assistance, they are routed and queued by the phone system, first to screeners and then to advocates via automated call distribution (ACD). SLS uses a sophisticated Executone telephone system with an auto attendant and voice mail and a function that allows the program to set intervals between calls to advocates. SLS purchased a reporting module for the system that monitors telephone utilization in real time and generates detailed reports on past use. The system gives SLS control over how calls are routed to staff. SLS has taken the time to learn how to use the system to its advantage and how to generate reports that are useful in helping it make decisions about how its intake system should be staffed.

## **Plans for the Future**

Over the next year, SLS is considering using E-mail for communications with other legal services providers and with pro bono attorneys, and will investigate establishing a web site.

## **Legal Services Law Line of Vermont, Inc. (Law Line)**

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### **Local Area Network**

Law Line has a nine station LANtastic network. Eight of the work stations are 486 systems; the other workstation is a pentium. The client data base is maintained on a separate pentium. The LANtastic network software requires that each workstation be individually configured. Advocate work stations use Windows 3.1 and do not have CD ROM. The work stations have 8 megabytes of memory.

### **Software**

Law Line uses Paradox for its client data base, client case notes, letter writing, conflict checks, activity reports and timekeeping. The cost of creating and maintaining this custom written application is about \$25,000. All advocates have access to the Internet. Law Line uses Word Perfect 6.1 for Windows and GroupWise for E-mail, which is also used by the offices of Vermont Legal Aid. Advocates can send and receive E-mail and faxes from their workstations.

### **Training**

Law Line did not conduct a formal general training for staff nor were staff sent to computer training seminars. Training was task-specific to the advocate and centered largely around the intake program and E-mail, the programs that staff use the most.

### **Legal Materials Available from Work Stations**

Advocates have access to legal materials through the Internet. Law Line does not have a law library on CD ROM.

### **Computer Responsible Person**

Law Line contracts with an outside person for computer support. Law Line's Executive Director and its Office Manager trouble-shoot where they can.

### **Telephones**

Law Line uses the Meridian system. The system has an auto attendant and voice mail. Currently, Law Line has a receptionist who answers the main telephone number. It uses the auto attendant for non-client telephone calls, from courts, attorneys, advocates, social service agencies, etc. Law Line used a consultant to help set up the system. Law Line cautions programs to make sure that all of its telephone numbers can roll over from one to another.

### **Plans for the Future**

Law Line will add memory to all of its workstations. It will continue to revise and polish its Paradox program. Law Line will convert Paradox from a DOS platform to a Windows platform, and will use the occasion for general training on using Windows. Law Line is considering constructing a web site and is looking at modifications to its telephone system.

## **Legal Advice and Referral Center (LARC-NH) (New Hampshire)**

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### **Local Area Network**

LARC-NH uses a 16 workstation Novell network. Three workstations are 150 MHz pentiums with 32 megabytes of memory . The other computers are 75 MHz

pentiums with 16 megabytes of memory. All of the workstations operate using Windows 95. They do not have CD ROM. The computer responsible person has a 17" monitor (as contrasted with a more typical 15" monitor). LARC-NH hired a consultant to install and set up the network.

## **Software**

LARC-NH uses the Neighborhood Legal Services (NLS) intake system but is preparing to switch to Kemp's Clients for Windows. It uses Word. Staff can fax from their desks. LARC-NH uses Microsoft Exchange for E-mail, which is also used by the offices of New Hampshire Legal Assistance. Not all advocates have access to the Internet from their workstations. However, there is also a central Internet connection in the library.

## **Training**

LARC-NH staff received computer training from an outside source. Staff may enroll in computer training on an "as needed" basis. Money is budgeted for these trainings.

## **Legal Materials Available from Work Stations**

LARC-NH has the New Hampshire statutes on a CD. Advocates access it through the network.

## **Computer Responsible Person**

A staff member serves as the network administrator and is designing the program's web site. He spends 1/4 to 1/3 of his time on those duties. With the

rest of his time, he is a case handler.

## **Telephones**

Client calls are routed and queued to advocates based on the type of legal problem, using the ACD feature. If an advocate is not available after a designated time in the queue (presently 10 minutes), the system prompts the caller to leave a message for a return call. LARC-NH pre-determines the maximum number of messages the system will accept. The system advises callers to call back if the message bank is full.

LARC-NH purchased its Executone telephone system. It did not purchase some of the reporting and monitoring options that SLS purchased. Nevertheless, the system records useful telephone usage data such as the number of calls received within certain time periods and the number of calls received daily by advocate.

## **Plans for the Future**

LARC-NH is switching to Kemp's Clients for Windows, and is in the process of building a web site on the Internet.

## **Legal Advocacy & Resource Center (LARC-Boston)**

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### **Local Area Network**

LARC-Boston has twelve stations on a Novell network. Eleven workstations are equipped with 75 MHz pentiums with 16 megabytes of memory. The other workstation has a pentium pro with 32 megabytes of memory, for generating data reports in Lotus Notes. All workstations use Windows 95 and have a CD ROM drive.

### **Software**

LARC-Boston uses Word Perfect for Windows for word processing and GroupWise E-mail to network with many other legal services providers in the area that also use GroupWise. This E-mail system allows other agencies to easily transmit client referrals to the LARC-Boston attorney public group and quickly communicate changes in intake protocols.

LARC-Boston's intake system was developed locally and is custom written in Visual Basic and Lotus Notes. Staff have fax capability from their workstations. LARC-Boston encourages clients and advocates to fax documents and client referrals directly to it. Internet access is currently available from one workstation.

### **Training**

To the extent possible, LARC-Boston uses in-house expertise for staff training purposes, and uses outside training resources when necessary

### **Legal Materials Available from Work Stations**

LARC-Boston provides automated legal research materials such as statutes and regulations at advocate workstations, and is interested in expanding its library of automated research materials.

### **Computer Responsible Person**

LARC-Boston has found a number of advantages in contracting for network and computer maintenance. The Executive Director serves as the in-house troubleshooter.

### **Telephones**

LARC-Boston contracts for the use and maintenance of its phone system and hardware. It uses twenty telephones. Callers are queued to workstations using ACD. Over the next year, LARC-Boston plans to purchase its own telephone system, which will include advanced messaging options, added voice mail capabilities, greater control of incoming calls and queued calls, options to improve bi-lingual services, and greater ability to provide client information recordings while clients are on hold.

### **Plans for the future**

LARC-Boston is exploring use of the Internet as a means for enhancing client services and for client access. It plans to raise funds to purchase a telephone system.

## **Northwest Justice Project Seattle /CLEAR Office**

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### **Local Area Network:**

NJP's central office, which includes the CLEAR hotline and its Kings County office, has a Novell 4.1 network with 31 workstations. (NJP's 9 field offices have Windows NT networks and Internet access and use Microsoft Office Suite). All computers are pentiums using the Windows 95 operating system. The workstations are Dell, the server an HP. There are three high speed HP5 Si shared printers. All staff have access to WESTLAW, a CD library and the Internet from their workstations. Internet access is gained through an ISDN line. The CD tower holds 7 CDs with both state and federal resources. There are also two computers available for staff to network from home using PC Anywhere (branch offices use these computers to dial in to the main office network and drop off advocates' timekeeping files). NJP has a tape backup with rotating nightly tapes.

While staff have the capacity to fax from their workstations, regular fax machines are generally used. A toll-free fax machine is available for clients to fax documents to CLEAR advocates at no telephone expense to the client.

NJP sent a questionnaire to other providers (including its field offices), asking the types of legal services provided and the types of referrals they would accept. This information was entered in a data base, which is continually updated. In making referrals, CLEAR advocates search the data base (for type of problem and location), determine whether the client's problem fits within the provider's specific referral criteria, and if so, make the referral.

## **Software**

NJP uses the Microsoft Office Suite on the network including Word7.0, Excel, Access and PowerPoint, and uses GroupWise for E-mail. Each project in the Seattle office has its own public group and can share relevant information easily. CLEAR advocates use GroupWise to keep up on day to day changes in referral information.

CLEAR has been using TurboCases as its intake software. It was decided that, although this was a DOS based software, it would allow CLEAR to start up quickly. NJP is now investigating a more advanced software package, and considering having an off the shelf package customized for its use. It is looking at ProLaw, and is awaiting results from the Michigan programs which have begun implementing it.

## **Training**

Staff were trained on TurboCases for three days and on Windows 95 and Word prior to commencing intake. Staff had used WP 5.1 previously, but it was not made available on any computers. Training requests are generally approved if relevant.

### **Legal Materials Available From Workstations**

Advocates have access to NJP's CD ROM library from their workstations. The library includes federal and state cases and statutes, and the State Administrative Code. Non-legal referral materials will soon be available electronically.

### **Computer Responsible Person**

The Director of Administration is responsible for NJP's technology planning and maintenance. She trouble-shoots the network, the phone and voice mail systems and the software for the Seattle office, and answers technical questions from the branch offices. She has taken an introductory Novell Administrators course. NJP has contracted with a local computer maintenance firm that assists with major problems and extensive changes and upgrades to the system.

### **Telephones**

NJP presently uses an older Toshiba digital phone system with 12 ports of voice mail and an ACD. It is now receiving proposals for a new phone system. The new phone system will have a 12 or 16 port voice mail system and an ACD which will allow CLEAR to give more information to callers, give the caller more choices regarding holding or leaving a message, allow bi-lingual advocates more flexibility and afford the ability to make changes instantly. The "real time" reporting module will be helpful for tracking statistics and for future planning. NJP

presently has one 24-channel T-1 line, and will probably add a second one with the planned expansion.

## **Future Plans**

Once CLEAR selects the case management software it will use for its intake system, NJP will use this software statewide in the branch offices for conflict checks (presently done in Word), case management and timekeeping. A long term goal is to transmit all referral forms, case notes, etc. electronically, rather than by fax.

1. LARC-Boston has operated a hotline for 14 years, but began doing so as part of an LSC-funded program in 1996.

This summary was prepared with the assistance of James Morrissey, working as a consultant for LSC.