

## **SALSA’S**

## **Volunteer Handbook**

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## San Antonio, TX 78212

## E: volunteer@sa-lsa.org \* W: www.sa-lsa.org

## Revised: January 2021

Dear Volunteer:

We are thrilled to have you become a SALSA volunteer. Through your pro bono service, you are making a direct and powerful impact on the lives of our clients and a broader contribution to access to justice in and around San Antonio.

This handbook is intended to provide an introduction to SALSA, including our organizational history, how we work, and what the volunteer experience looks like. Additional materials are available on our website: www.sa-lsa.org, and SALSA staff are always just a call or email away if you have any questions.

The civil justice gap in Texas continues to disproportionately impact low-income San Antonians confronting critical legal problems that threaten basic human needs (housing, family composition, income) without the benefit of an attorney. On behalf of our fellow San Antonians who are eligible for free legal services, we thank you for dedicating your time and talent to helping to close this justice gap.

Together, we are making difference in the lives of our clients and our community.

With thanks,

SALSA Staff and Board of Directors

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**I. Introduction to SALSA**

San Antonio Legal Services Association (SALSA), formerly known as the Community Justice Program (CJP), started almost twenty years ago. In 2001, Justice Phyllis Speedlin and attorney Karen Pozza, then-president of the San Antonio Young Lawyers Association, recognized the need for pro bono legal services in San Antonio. After exploring how pro bono programs worked in Dallas and Austin, a committee was formed in partnership with San Antonio Bar Association leadership to create the “Just Take One” program, which paired attorneys with clients in need. The “Just Take One” program evolved into the community justice program and received its nonprofit status in 2004.

 Over the years, partnerships with Texas Rio Grande Legal Aid and St. Mary's Law School allowed the program to prosper and grow using a recurring legal clinic model. CJP initially held monthly Family Law clinics at a local community center, later expanding programming to include Estate Planning (Wills) Clinics as well as Veterans Legal Advice Clinics at the VA Hospital. These recurring clinics targeted indigent, vulnerable, and at-risk populations, including Habitat for Humanity families needing to protect their assets as first-time homeowners, disabled veterans fighting for access to earned benefits, and children whose lives were in turmoil because of their caretaker’s lack of access to legal support for issues such as divorce and child support. CJP also held single issue clinics with a variety of community partners, collaborating with County Commissioners to provide identification cards for clients in need of community services, assisting citizens with disabilities in executing documents to receive necessary medical treatment, and providing emergency legal services for people impacted by hurricane Harvey and the Sutherland Springs shooting.

 In August 2019, after more than fifteen years of existence as part of the San Antonio Bar Association, we ushered in a new era for the program with a new, independent Board of Directors. The decision to re-launch as a separate entity stemmed from the shared recognition that a dedicated group was necessary to expand and tailor programming to address the enormous need for civil legal services in our community.

 SALSA has relied on generous support from the San Antonio Bar Foundation, the Association of Corporate Counsel, the Texas Access to Justice Foundation, the Texas Bar Foundation, local law firms, including our Keystone Sponsor: Watts Guerra, and our Cornerstone Sponsors: Dykema, Haynes Boone, Jackson Walker, Langley & Banack, Inc. and Norton Rose Fulbright, and individual community members. This ongoing support ensures that when community needs are identified, SALSA stands ready to serve its clients. Over the years, SALSA has become the reality that Justice Speedlin and Justice Pozza imagined so many years ago.

**II. What We Do**

SALSA recruits, trains, and supports volunteer lawyers to represent eligible clients where critical legal needs are at stake. SALSA focuses on the following priority areas (for a complete list of SALSA’s substantive legal areas, please see Appendix C:

1. **Preventing Homelessness**
	1. **Landlord-Tenant:** SALSA accepts cases where tenants face eviction for nonpayment of rent or where there is some possibility of a negotiated settlement with the landlord that would assist the tenant with obtaining a safe place to live and/or avoiding eviction.
	2. **Expunction/Non-Disclosure**: SALSA accepts cases in which clients are seeking expunction or non-disclosure of a criminal conviction in order to enhance the client's chance of employability.
	3. **Bankruptcy**: SALSA accepts cases in which indigent clients are seeking to file for Chapter 7 Personal Bankruptcy.
2. **Advocating for Vulnerable Populations**
	1. **Domestic Relations:** SALSA assists indigent victims of domestic violence seeking protective orders.
	2. **Estate Planning:** SALSA accepts cases for vulnerable clients who are seeking a simple estate plan.
	3. **Probate:** SALSA accepts uncontested independent administrations where the decedent died testate. SALSA also helps applicants who have filed a small estate affidavit pro se, whose application has been rejected by the Probate Courts.
	4. **Guardianship:** SALSA accepts guardian of the person cases when both the applicant and the allegedly incapacitated person are indigent.
3. **Protecting Individual Rights**
	1. **Psychiatric Advanced Directive:** SALSA partners with TRLA to provide assistance to clients with mental illness to prepare in advance for a mental health crisis.
	2. **Alternatives to Guardianship:** SALSA partners with TRLA to provide assistance to disabled clients with the execution of supported decision-making agreements and powers of attorney.

**III. Funding**

SALSA is a not-for-profit corporation organized under section 501 (c)(3) of the Internal Revenue Code. SALSA is funded primarily by grants/donations from foundations, law firms, corporations, and individuals.

If you wish to make a financial contribution to SALSA, please make a donation online at: http://www.sa-lsa.org/donate. For more information on how you or your organization can provide financial assistance, please contact SALSA’s Executive Director, Sarah Dingivan, at sarahd@sa-lsa.org.

**IV. SALSA’s Clients**

To qualify for services provided through SALSA, clients must reside in or around San Antonio or their legal problem must have arisen in or around San Antonio, and clients must satisfy financial eligibility guidelines (See Appendix A and Appendix B for more details).

Citizenship status does not preclude SALSA from accepting a client for matching with a volunteer attorney, though we do try to collect the information for our records. For more information, please contact SALSA staff.

**V. Working with SALSA’s Clients**

Solicitation: SALSA has a strict no solicitation policy. Should a SALSA client ask for assistance on any other matter besides the one assigned to you as a volunteer, please contact the SALSA staff member assigned to your case.

SALSA’s volunteers come from all practice areas and may not be familiar working with some of the issues our clients regularly face. SALSA has mentors that are available to provide substantive assistance should you run into any issues during the course of your representation.

Some non-substantive issues may arise in the client/attorney relationship that may impact your representation of your client. Below are some common concerns volunteers may encounter, some suggestions for how to address these concerns, and possible next steps. Please do not hesitate to contact the SALSA staff member who referred your case if you have any questions.

|  |  |  |
| --- | --- | --- |
| **Common Concern** | **Suggested Course of Action** | **Next Steps** |
| Client has limited proficiency speaking, reading, writing, & understanding English.  | Request a translator or interpreter from SALSA to assist with client meetings.  | Contact SALSA staff for more resources.  |
| Client has difficulty reading and/or writing.  | Try scheduling times to speak on the phone with your client or scheduling in-person meetings (if safe and appropriate); remember to read out loud any written materials.  | Contact SALSA staff for more resources.  |
| Client has limited mobility or is homebound.  | Try scheduling times to speak on the phone with your client or schedule a home visit with your client (if safe and appropriate).  | Contact SALSA staff for more resources. |
| Difficulty getting in touch with your client.  | Send a letter to your client’s home address requesting s/he contact you by a specific date, including good times for her/him to call you.  | Contact SALSA staff for more resources. |
| Client has not provided requested documents or information.  | Send a letter to your client’s home address listing the specific information and/or documents and requesting them by a specific date; include a self-addressed stamped envelope your client can use to mail the documents to your office.  | Call your client again after a week or two to remind her/him; then contact SALSA staff to reach out to the client.  |
| Client has not arrived for scheduled meetings.  | Try calling your client a day or two in advance of a scheduled meeting to remind them and clarify any steps or security procedures they will need to sign into a Zoom meeting or meet you at your office.  | Send a letter to your client’s home address reminding her/him of the scheduled meeting and what information or documents you will need, then contact SALSA staff to reach out to your client.  |
| Client “drop-ins” without a scheduled meeting.  | Remind your client that you can meet only at the times you have scheduled in advance.  | Contact SALSA staff and request to meet your clients at one of SALSA’s offices.  |

**VI. How the Program Works**

SALSA’s clients are generally referred to SALSA by other legal service agencies or partner organizations, and then SALSA attempts to refer clients who have meritorious civil cases to volunteers. SALSA screens each case to ensure that the client is income-eligible and to determine that the claim or defense is meritorious. SALSA’s staff then contacts prospective volunteers to find a person willing and able to handle the case who can provide high-quality professional services. After the referral is made, the staff periodically contacts the volunteer to determine the status of the case and to ask whether any support services are needed. For details about the Case Referral Process, please see Appendix D.

*Please note: SALSA does not accept criminal or fee-generating matters for referral to volunteers.*

**VII. Support Services**

SALSA offers many supportive services to ensure that our volunteers have the training and mentoring needed to effectively represent a client.

**SALSA Staff:** SALSA staff includes Staff Attorneys, Fellows, Pro Bono Coordinators, and law student interns who are available to answer questions and provide guidance on your SALSA case. Staff can assign co-counsel or a mentor, if desired.

**Training Materials and Resources:** SALSA offers its volunteers substantive training sessions conducted by experts in various fields of the law.

SALSA offers an extensive resource library on SALSA’s website, which includes training materials, subject-specific handbooks, sample pleadings, forms, and other literature: <https://www.sa-lsa.org/volunteer/resource-library/>

**Malpractice Insurance:** Throughout the course of the representation, the volunteer is covered by SALSA’s professional liability insurance for negligence claims arising from the handling of the SALSA matter.

**Translators and Interpreters:** SALSA recruits multilingual law students and paralegals that assist our volunteers with translation services. We also have access to the Language Access Fund of the State Bar of Texas. Please contact the SALSA staff member who referred your case to you for more information.

**Mentors:** SALSA offers a wide range of mentoring services. Whether a volunteer needs guidance and one-on-one assistance through all stages of a case or merely wants someone to discuss case strategy, SALSA has appropriate mentors who are highly regarded in their respective areas of expertise. The SALSA mentoring program offers newer attorneys the opportunity to work with these seasoned practitioners. The program also provides a unique opportunity for senior attorneys to share their considerable knowledge and experience and to promote access to high quality pro bono representation. A volunteer attorney who would like to work with a SALSA mentor should contact the SALSA staff member who referred the case. If you would like to be a SALSA mentor, please email SALSA at volunteer@sa-lsa.org.

**VIII. Expectations and Responsibilities**

**SALSA’s Responsibilities to our Clients and our Volunteers:**

1. Monitor case and provide technical assistance and advice.
2. Track cases and their outcomes.
3. Coordinate training programs and materials (please see Appendix H).
4. Respond to any questions or concerns from attorneys and clients.

**Volunteer’s Responsibilities:**

1. Complete any case accepted from SALSA.
2. Discuss with the client the extent of the representation that the volunteer agrees to undertake on the client’s behalf.
3. Assist with tailoring the scope of the Pro Bono Engagement Agreement (SALSA staff will work with client to obtain the client’s signature).
4. Consult with the SALSA referring attorney or Pro Bono Coordinator for technical assistance or to request training, a mentor, co-counsel, or other support, as necessary.
5. Keep SALSA advised of the status of the case and any problems encountered by completing and returning Status Reports to SALSA in a timely manner (can be found at www.sa-lsa.org).
6. Complete and return the Closing Form to SALSA along with a copy of the closing letter sent to the client when the case has ended (can be found at https://www.sa-lsa.org/volunteer/status-reports/).

**Clients’ Responsibilities:**

1. Maintain regular contact with the volunteer.
2. Provide requested information and documents in a timely fashion.
3. Keep scheduled in-person and phone meetings.
4. Communicate any updated changes to the volunteer regarding the client’s situation or case facts.

**IX. Who Should I Contact? – Questions, Concerns, Suggestions**

Being a SALSA volunteer should be a rewarding experience. Our staff is always available for any questions, concerns, or suggestions you may have about your case or the program. We try to respond to all phone calls and e-mails within two business days.

Below is a list of staff people most likely to be able to address your concerns. If that person is unavailable, any other staff member will be happy to help you – our door is always open!

**Executive Director:**

* Suggestions for recruiting new volunteers.
* Suggestions for improving SALSA procedures and volunteer experiences.
* Questions about in-kind or monetary donations.

**Staff Attorney/Fellow:**

* Questions or doubts regarding the legal merits of the case.
* Questions or doubts regarding a client’s financial eligibility.
* A client requests legal services for an unrelated issue.

**Pro Bono Coordinator:**

* Requests for client support services.
* Questions regarding client relations.

**X. Staff Contact Information**

|  |  |
| --- | --- |
| **Staff Member Name/Title** | **Email** |
| Sarah Dingivan, Executive Director | sarahd@sa-lsa.org |
| Joe Pina, Veterans Staff Attorney | joep@sa-lsa.org |
| Kat McColley Doucette, Staff Attorney | katd@sa-lsa.org |
| Rick Gonzalez, Housing Fellow | rickg@sa-lsa.org |
| Hilary Showers, Family Law Fellow | hilarys@sa-lsa.org |
| Valerie Sanchez, Estates Fellow | valeries@sa-lsa.org |
| Tashawna Campbell, Veterans Pro Bono Coordinator | tashawnac@sa-lsa.org |
| Alison McConnon, Pro Bono Coordinator | alisonm@sa-lsa.org |

**XI. SALSA’s Board of Directors**

SALSA’s Board of Directors includes attorneys in private practice, attorneys serving as corporate counsel, two designees of the San Antonio Bar Association, one designee of the San Antonio Paralegal Association, and at least one public member. The Past President of the San Antonio Bar Association, two Judicial Co-Chairs, and a representative from Texas RioGrande Legal Aid also serves ex officio on the Board of Directors. For a list of the 2021 Board of Directors, please see Appendix E.

1. **Conclusion**

Your involvement in SALSA is essential – to SALSA, to the legal community, and most of all, to the low-income San Antonians who will benefit from your willingness to help. We appreciate your help, and so do they. Your dedication, effort, and expertise are vital to SALSA’s ability to help its clients. As a SALSA volunteer, we hope you will have the satisfaction of knowing that you have helped people in search of justice and fairness from the judicial system – people with literally nowhere else to turn. You will also have the recognition and thanks of SALSA, the San Antonio Bar Association, and the legal community.

If you believe you have a client story that others would like to hear about, please let us know. Our volunteers are our best ambassadors for the importance of our work.

**Thank you for taking a case!**

**Appendices**

**About SALSA**

Appendix A: Eligibility Guidelines

Appendix B: Financial Eligibility Guidelines

Appendix C: Cases Accepted by SALSA

Appendix D: SALSA’s Referral Process

Appendix E: 2021 Board of Directors

**For Volunteers**

Appendix F: Waiving Filing Fees: *Affidavit of Indigency Indigency* and Legal Aid Certificate Under Rule 145 of the Texas Rules of Civil Procedure to accompany Affidavit

Appendix G: e-filing Instructions to create Payment Waiver

Appendix H: Continuing Legal Education (CLE)

Appendix I: Attorney Fee Policy

Appendix J: Legal Server Cheat Sheet – Tips and Tricks to use SALSA’s Case Management System

**Samples**

Appendix K: Client Referral Letter

Appendix L: Representation Agreement

Appendix M: Letter to Client Regarding Failure to Contact Volunteer

Appendix N: Attorney Initial Status Report

Appendix O: Status Report/Closing Form

Appendix P: Client Letter from Attorney Re Case Closure

Appendix Q: Setting up a Google Voice

**Appendix A: SALSA Eligibility Guidelines**

**Income Eligibility**

To be served by SALSA, a SALSA client must not have household income (measured in the month or year immediately preceding such client’s request for assistance) in excess of 125% of federal poverty guidelines, unless they are veterans or qualifying family members, in which case client household income cannot exceed 200% of federal poverty guidelines.

**Asset Eligibility**

To be served by SALSA, a SALSA client must not have liquid assets in excess of $10,000 (plus $5,000 for each additional qualifying family member) and non-liquid assets in excess of $15,000 (plus $5,000 for each additional qualifying family member). In making these calculations, property exempt under Texas law, such as the client’s principal residence, one car, personal and household goods, tools, or equipment essential to employment, trusts restricted to educational or medical purposes, interest in IRA or Keogh plans, assets not counted by public assistance programs, and burial plots or trust, shall not be counted. However, a SALSA client with collective equity of more than $150,000 in this exempt property shall not qualify for service from SALSA.

**Policy Exceptions**

The SALSA board may vary the income and asset limitation as necessary to meet situational needs. In the event SALSA does vary its Client’s Income or Asset Policy, SALSA shall not allow any staff funding by the Texas Access to Justice Foundation (TAJF) to serve clients outside of SALSA’s baseline income and asset restrictions. For instance, SALSA implemented a Remote Wills Clinic for healthcare workers battling the COVID-19 pandemic. To implement that program, SALSA decided it was temporarily necessary to lift its income and asset limitation restrictions and utilize non-TAJF funded staff and volunteers to administer this program.

**Procedural Exceptions**

After determining that a client is financially eligible and after accepting that client for service, the client’s changed circumstances may make them ineligible for services. Upon learning that a client is no longer financially eligible for services, representation shall be discontinued as long as (1) the change in circumstances is sufficient, likely to continue, and enables the client to afford private legal assistance; and (2) discontinuation is consistent with applicable rules of professional conduct. This same rule applies when later discovered or disclosed information renders the client financially ineligible for services.

A person who is income and asset eligible under these guidelines will not be represented if the legal problem does not come within the priorities of SALSA and SALSA’s case acceptance criteria. In determining case acceptance criteria, SALSA may consider the following factors:

* Merit of claims client wishes pursued;
* Seriousness of the problem and consequences to the applicant if assistance is denied;
* Availability of low-cost or pro bono counsel for the particular legal problem for which assistance is sought;
* Current income prospects, considering seasonal variations in income;
* Cost of legal representation needed in relation to applicant’s assets (even if assets are within eligibility limits); and
* Program resources required to provide assistance in relation to total resources available.

A person may be denied legal assistance if there is evidence of a prior final judicial or administrative determination that such individual’s lack of income results from refusal or unwillingness, without good cause, to seek or accept employment. This paragraph does not bar provision of legal assistance to an otherwise eligible person who seeks representation to challenge that prior determination.

**Appendix B: 2021 Financial Income Guidelines**

Client eligibility is income-based and clients’ assets are vetted as part of the intake process. Typically, veterans and their family members are eligible for services if they are at or below 200% of the Federal Poverty Guidelines and all other clients must be at 125% of the Federal Poverty Guidelines. SALSA occasionally makes exceptions to this policy for particularly vulnerable populations.

*We will update annual Financial Income Guidelines as they become available.*



2021 FINANCIAL INCOME GUIDELINES1

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **2021 IOLTA/BCLS2 Financial Eligibility Guidelines** **125% of Federal Poverty Guidelines** | **2021 CVCLS3 Financial Eligibility Guidelines 187.5% of Federal Poverty Guidelines** | **2021 Other TAJF Funds (including LASSA4, LAV5 & LACH6)** **Financial Eligibility Guidelines** **200% of Federal Poverty Guidelines** | **2021 Federal Poverty Guidelines** |
| People in Household | Annual Household Income 125% of Poverty Guideline | Annual Household Income 187.5% of Poverty Guideline | Annual Household Income200% of Poverty Guideline | 100% |
| 1 | $16,100 | $24,150 | $25,760 | $12,880 |
| 2 | $21,775 | $32,663 | $34,840 | $17,420 |
| 3 | $27,450 | $41,175 | $43,920 | $21,960 |
| 4 | $33,125 | $49,668 | $53,000 | $26,500 |
| 5 | $38,800 | $58,200 | $62,080 | $31,040 |
| 6 | $44,475 | $66.713 | $71,160 | $35,580 |
| 7 | $50,150 | $75,225 | $80,240 | $40,120 |
| 8 | $55825 | $83,738 | $89,320 | $44,660 |
| For each additional member of the household in excess of 8, add:  | $5,675 | $8,513 | $9,080 | $4,540 |

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1 See HHS Poverty Guidelines for 2021 published week of January 18 -22, 2021

2 Interest on Lawyers Trust Account (“IOLTA”)/ Basic Civil Legal Services (“BCLS) funds

3 Crime Victim Civil Legal Services (“CVCLS”)

 4 Legal Aid to Survivors of Sexual Assault (“LASSA”)

5 Legal Aid to Veterans (“LAV”)

6 Legal Aid for Communities & Homeowners (“LACH”)

**Appendix C: Cases Referred for Extended Pro Bono Assistance**

Currently, SALSA accepts cases in the following substantive legal areas for extended representation. Each case is reviewed by SALSA staff in consultation with the referring agency, when possible, prior to being offered to a pro bono attorney to ensure that it is appropriate for pro bono assistance. Please visit our website, www.sa-lsa.org, for a list of available cases.

* Adoption
* Bankruptcy
* Child Support
* Contracts
* Collections
* Consumer
* Divorce
* Expunction/Non-Disclosure
* Guardianship of the Person
* Landlord/Tenant
* Medicaid/Medicare
* Name Change
* Paternity
* Probate
* Real Property
* SSI/SSDI
* Tax
* Veterans’ Benefits
* Wills/Estates

**Appendix D: The Referral Process**

SALSA’s referral process generally works like this:

Intake: Clients are referred to SALSA from our partner organizations, including Texas RioGrande Legal Aid (TRLA), or from SALSA’s Veterans’ Legal Advice Clinic.

1. Partner Referrals:
	1. TRLA – TRLA conducts an intake interview and screens the client for financial eligibility, case type and potential legal merit. (Attached as Appendix B are the current income eligibility guidelines used in this screening process). A SALSA Staff Attorney screens again for potential legal merit and appropriateness for volunteer placement. The case is assigned to a SALSA staff member and if necessary, the referring staff person contacts the client and gathers additional information and supporting documentation.
	2. Other Partners – Community partners provide direct referrals to SALSA. During this referral, cases are screened for income eligibility. A SALSA Staff Attorney screens cases for potential legal merit and appropriateness for volunteer placement. The case is assigned to a SALSA staff member and if necessary, the referring staff person contacts the client and gathers additional information and supporting documentation.
2. Veterans’ Legal Advice Clinic Referrals: Cases that come through our Veterans’ Legal Advice Clinic have been referred for extended representation by one of our Volunteer Attorneys or a SALSA Staff Attorney that has spoken with the client during an advice clinic. Their recommendation is forwarded to our Veterans Staff Attorney. The Veterans Staff Attorney screens again for potential legal merit and appropriateness for volunteer placement. The case is assigned to a SALSA staff member and if necessary, the referring staff person contacts the client and gathers additional information and supporting documentation.

Referral to Volunteer: The pro bono coordinator or staff attorney assigned to the case then contacts potential volunteers (directly or through the pro bono opportunities page on SALSA’s website) and asks the volunteer to accept the case. Of course, volunteers may contact SALSA and request a referral at any time. Every effort is made to match the volunteer with the particular type of case requested.

Conflicts Checks: The staff person assigned to the case provides potential volunteers with a case summary, the parties’ initials, and the SALSA case number *only* before conflicts are cleared. If the volunteer is interested in taking the case, the client’s name and other identifying information is provided to the volunteer for a conflict check. After conflicts clear, the staff person provides additional relevant information from the SALSA file to the volunteer attorney. If requested, the potential volunteer may review the additional relevant information in the SALSA file before accepting the case, but not before conflicts have cleared.

Confirmation of Referral: Once a volunteer accepts a case, SALSA sends written confirmation to the client and an email to the volunteer confirming the referral. Generally, the client notification (Appendix K) tells the client the name and telephone number of the volunteer and informs the client that if he or she fails to contact the volunteer attorney within 7 days, he or she may be disqualified from the program. If the client does not contact the volunteer within 7 days, SALSA asks the volunteer to contact the client, reminding the client that he or she must contact the lawyer right away, so that the lawyer can represent the client effectively (Appendix M).

Referral Complete/Representation Agreement: Once the attorney agrees to represent the client, the client and attorney must enter into a written agreement concerning the representation (Appendix L). This makes the respective responsibilities clear. Attorneys may use their own representation agreement or SALSA’s Pro Bono Engagement Agreement (Appendix L). Once signed, the volunteer must send a copy to SALSA via the case email address.

Referral Incomplete/Not Accepted: If the volunteer is unable to handle the case for any reason, he or she should contact the SALSA staff member who referred the case by telephone or email immediately.

1. If the volunteer is willing to handle the case, but the client does not contact the volunteer after the attorney reaches out to the client (Appendix M), the volunteer should complete a Case Closure Report (Appendix O) on SALSA’s website, showing as the reason for case closure, “Client Did Not Follow Through”.
2. If after interviewing the client and reviewing the case, the volunteer has doubts about the client’s eligibility or the merits of the case or has any other concerns, the volunteer should contact the SALSA staff person who referred the case. If the volunteer decides not to handle the case, the Case Closure Report should be returned to SALSA, showing the appropriate reason for case closure.

Status Report: SALSA asks the volunteer to complete an initial status report five (5) business days after the referral is made and periodically thereafter (Questions can be found at Appendices N and O). Status reports are completed on SALSA’s website and are emailed to SALSA staff. Volunteers who do not return status reports will be contacted by a SALSA staff member.

Costs and Expenses: Court costs for many SALSA clients can be waived or avoided by filing an Affidavit of Indigency or other forum specific form. These standard affidavits and forms are available in Appendix F and are usually submitted electronically with the first court filing (see Appendix G for waiver of e-filing fees). All non-waived costs associated with the case are the responsibility of the client.

Closing Form: After the case has been accepted, handled, and closed the volunteer should complete the Case Closure Report, which is located on SALSA’s website and the report is emailed directly to SALSA staff (Appendix O). SALSA staff will contact the lawyer at the conclusion of the case to discuss interest in taking on new pro bono matters.

**Appendix E: SALSA 2021 Board of Directors**

|  |  |
| --- | --- |
| **Voting Board Members:**  |  |
| *Robert L. Soza, Jr.* Jackson Walker, LLP | *Beth Eby\*\*\**Eby Financial |
| *Michael Parker*Norton Rose Fulbright  | *Michael Danforth*USAA |
| *Len Briley*AT&T Services, Inc.*Alex Miller* Valero | *Eric Michael Garza*Lindow Stephens Treat*Shari Mao*Jackson Walker, LLP |
| *Mary Brennan Stich*Rackspace Technology | *Orlesia Tucker*FBD Partnership, LP |
| *Jessica Johnson Lerma* Grunt Style, LLC | *Cameron Redding*Redding Law, PLLC |
| *Marty Truss\**Dykema | *Greg Zlotnick*St. Mary’s University Law School |
| *Sheila Grigar*Southwest Research Institute | *Susan Wilen\*\**San Antonio Paralegal Association |
| *Ryan Cox\**Texas Civil Rights Project | *Chris Rulon*NuStar Energy, L.P. |
| *Serina Rivela*University Hospital**Ex Officio Members:***The Honorable David Canales*73rd District Court, Bexar County*Tom Crosley*Crosley LawImmediate Past President, SABA | \*SA Bar Association Designee\*\*SA Paralegal Association Designee\*\*\*Public Member*The Honorable Judge Veronica Vasquez*Probate Court #2, Bexar County*Julia Raney Rodriguez*Texas RioGrande Legal Aid |

**Appendix F: Waiving Filing Fees: Affidavit of Indigency**





LEGAL AID CERTIFICATE UNDER RULE 145 OF

THE TEXAS RULES OF CIVIL PROCEDURE

 The San Antonio Legal Services Association (“SALSA”) has referred \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(“Party”) to the undersigned attorney and the attorney has accepted to represent \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ on a *pro bono* basis. SALSA, and the *pro bono* attorneys who accept *pro bono* referral cases from SALSA, provide free legal services, without contingency, because of the party’s indigency.

 SALSA is funded by the Texas Access to Justice Foundation and is a nonprofit that provides civil legal services to persons living at or below 200% of the federal poverty guidelines published annually by the United States Department of Health and Human Services.

|  |
| --- |
| Respectfully Submitted,  |
|  |
| By: |
| Texas Bar No. |
| Phone:  |
| Fax:  |
| Email: |
| ATTORNEY FOR:  |
|  |

**Appendix G: e-Filing Instructions to Create Payment Waiver Account for Indigent Client**

When representing a SALSA client, you should not have to pay the court filing fees because the client should qualify for a waiver of those fees by meeting the indigency guidelines. Please note, you are never responsible to pay fees. If, for some reason, a waiver of the fees is not granted in your case, the client is wholly responsible for payment of all fees associated with the case.

To set up a Payment Waiver account for e-filing, login to your efile.txcourts.gov account:

1. Click on the orange “Actions” tab on the top right hand side of the page.
2. Select “Payment Accounts” from the dropdown menu.
3. Select “Add Payment Account.”
4. Under “Payment Account Name” type “Waiver.”
5. Under “Select Payment Account Type” select “Waiver.”
6. Save changes.
7. Go back to the main homepage to begin the e-filing process.
8. Select “Start a New Case.”
9. Attach your Affidavit of Inability to Pay as a lead document and your Legal Aid Certificate as an ancillary document.
10. Then file your Application or Petition as a subsequent lead document, followed by any other lead or ancillary documents that you need to file.
11. Be sure to include in the notes to the court that you are working with the San Antonio Legal Services Association to represent this client pro bono and have attached an Affidavit of Inability to Pay.
12. In the Fees section, select “Waiver” from the “Payment Account” dropdown menu.

If your filing is rejected, be sure to contact the court clerk to insure they received your Affidavit of Inability to Pay Court Costs and accompanying Certificate. The clerk will be able to answer any subsequent filing instructions.

**Appendix H: Continuing Legal Education (CLE) Credit**

While San Antonio Legal Services Association (SALSA) offers many different types of training for the varying programs and clinics, only some training opportunities qualify for CLE credit.

Training opportunities will be held in legal areas that support indigent, vulnerable, and at-risk members of our community.

**Available training and CLE opportunities are listed on SALSA’s Volunteer Hub site, which can be accessed by clicking “Volunteer” on our website, www.sa-lsa.org.**

**Appendix I: Attorney Fee Policy**

SALSA screens all cases for fee-generating potential, and those cases which may result in an award from which a fee could be paid by one of the litigants are sent to the San Antonio Bar Association’s Lawyer Referral Service (LRS). Nevertheless, a case sometimes develops in such a way that fees become possible. If this occurs, the attorney and the client have several options:

1. Advise SALSA and the client that the case has become potentially fee-generating and send the client to LRS for new representation. Withdraw representation, and SALSA closes the case in the office.
2. If the client wishes to continue with the volunteer attorney as a paid representative, SALSA must be informed that the case is being closed as a SALSA pro bono case. When an attorney becomes aware of any fee-generating matter for a client, the attorney must contact a SALSA staff attorney before offering to assist that SALSA client. The attorney must inform the client that s/he is under no obligation to continue with the volunteer, and that referral to the LRS is available. If the client wishes to maintain the relationship with the attorney, the attorney from that point will treat the case as any other paying case would be treated. SALSA closes the case in our office.

**Appendix J: Legal Server Cheat Sheet – Tips and Tricks to use SALSA’s Case Management System**

**What is Legal Server?**

Legal Server is the case management system that SALSA utilizes. In Legal Server, we store all information and documents for all of our open and closed cases.

**What you’ll see on Legal Server:**

When you login with your username and password at <https://sanantonio.legalserver.org/>, you will have access to all of the cases that SALSA has assigned to you. There are several tabs on the home screen, but the main ones you will be utilizing are “My Assignments” and “Pro Bono Opportunities.”

Under “My Assignments,” you will find all of your assigned cases. To open a case, press the “Case ID” for the appropriate case (first column on the left-hand side). Once you have chosen your case, you will have access to all case notes and documents. You will also be able to add any notes and upload any appropriate documents that are provided to you.

Under the “pro bono opportunities” tab, you will find any available opportunities that we have for volunteer attorneys.

**Legal Server E-mail Address:**

Each case has a unique Legal Server e-mail address, which can be found on the left-hand column under “Case e-mail.” We request that this e-mail be copied on all e-mail correspondence for the case because e-mails to the address will be automatically saved into the case under the “Case Notes” tab and the documents will also be saved under the “Documents” tab. You can also forward any e-mail correspondence and documents to this e-mail address to save it to the case file.

**How to create a case note:**

When you are in the case on Legal Server:

1. Click Actions, Case Notes
2. Note Type: Case Notes
3. Fill in “Subject”
4. Enter details in “Body”
5. If you would like to attach a document to this note, upload under “Documents” header
6. Press “Continue” in bottom right hand corner to save your notes.

**How to upload a document to a case:**

When you are in the case on Legal Server:

1. Click “Actions,” and “Add a new document to this case”
2. Fill in “Document Title”
3. “Choose File” to upload from your computer
4. Choose which folder to save the document to
5. Press “Continue” in bottom right-hand corner

\*If you have questions about Legal Server or need help with the case management system, please contact Alison McConnon at alisonm@sa-lsa.org.

**Appendix K: Client Referral Letter**

|  |  |  |
| --- | --- | --- |
| San Antonio Legal Services Association  P.O. Box 12404, San Antonio, TX 78212 Fax (210) 855-9059 [www.sa-lsa.org](https://word-edit.officeapps.live.com/we/www.sa-lsa.org%22%20%5Ct%20%22_blank)  |   | **Macintosh HD:Users:katdoucette:Desktop:CJP:SALSA Logo - color.pdf**  |

(Date)

Client Information

Dear (Client’s Name):

 We have determined that you qualify for services with San Antonio Legal Services Association. The lawyer who will represent you is:

**Volunteer’s Information**

 You should call this lawyer at **(Volunteer’s Telephone Number)** within seven (7) days. If you do not do so, he or she may decide not to help you.

 Although, you will not have to pay for the lawyer’s work, you may have to pay some court costs. The lawyer will tell you how much these costs will be. If you cannot pay the costs, please tell your lawyer. If your financial status changes during the time your lawyer is representing you, please notify SALSA and your lawyer.

 If you have any questions or if you have trouble connecting with your lawyer, please call me as soon as possible.

Sincerely,

Staff Attorney/Paralegal

Telephone: (XXX) XXX-XXXX

Cc: Volunteer’s Name, Esquire

**Appendix L: Representation Agreement**



PRO BONO ENGAGEMENT LETTER

This Agreement for civil legal representation and services is between \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, a volunteer attorney with the San Antonio Legal Services Association (SALSA), hereinafter called the “Legal Representative,” and \_\_\_\_\_\_\_\_\_\_\_\_ hereinafter called the “Client.”

 The Client hereby authorizes the Legal Representative and SALSA to represent the Client in the civil legal matter described as follows:

The Client also authorizes the Legal Representative to obtain any information or documents necessary for such representation, and to assist the Legal Representative in obtaining all of the facts for the case. The Legal Representative agrees to give the Client zealous representation in the above-described legal matter, and to work with SALSA in obtaining necessary supportive services. The Legal Representative’s obligations under this Agreement end after the matter has received a final adjudication in the current legal forum, although the Legal Representative may choose, upon consultation with SALSA, to take appropriate further steps in the matter at the Client’s request.

**I HAVE THE FOLLOWING RIGHTS AS A CLIENT:**

1. To be kept informed about any important developments in my case.
2. To be consulted before any significant decision is made on my behalf, and to be given sufficient information to make an informed decision.
3. To be consulted on any settlement proposal on my case before the matter is settled by my Legal Representative.
4. To have information regarding my case kept confidential. However, I recognize that my Legal Representative may discuss certain facts of my case with individuals at SALSA and with others to the extent that it is necessary for representation in this case.

**AS A CLIENT I PROMISE TO DO THE FOLLOWING:**

1. To inform my Legal Representative of any change in my address, telephone number, or email address.
2. To inform my Legal Representative of any change in my income or assets.
3. To appear at my hearings and court appearances, and to keep all appointments with my Legal Representative unless I have called in advance to cancel the appointment.
4. To pay any litigation fees or fees for obtaining necessary documents which are not waived if I am able to do so.
5. To avoid communications with opposing parties or opposing counsel without prior consultation with my Legal Representative.

**LEGAL REPRESENTATIVE’S OBLIGATIONS:**

1. To keep the Client informed of what is being done about the Client’s case and to consult with the Client before any significant decision is made on the Client’s behalf.
2. To represent to the Client free of charge, accepting no attorneys’ fees from the Client. If the Client is able to pay, he/she will have to pay any court fees and fees for obtaining documents, unless those fees can be waived. Any attorneys’ fees that may be awarded by the court and/or paid by the opposing party in this representation will be distributed in accordance with the SALSA Attorneys’ Fees Policy then in effect.

**TERMINATION OF REPRESENTATION:**

1. The Client is free to request that the Legal Representative cease representing him or her at any time for any reason, subject to necessary court approval. In the event of dismissal of a Legal Representative by the Client, SALSA does not guarantee that another Legal Representative will be found.
2. The Legal Representative may cease representation of the Client, subject to necessary court approval, under the following circumstances: (a) further representation would be useless or unreasonable, or would not help to achieve the Client’s objectives; (b) the Client is no longer financially eligible for services through SALSA; (c) the Client has failed to cooperate in the representation; (d) the case has exceeded the scope of representation agreed upon, or (e) when otherwise mandated or allowed by the Rules of Professional Conduct.
3. SALSA may close, withdraw from, or dismiss the Client’s case, subject to the necessary court approval and consistent with the Rules of Professional Conduct, if: (a) the legal service it has agreed to provide is completed or if, in SALSA’s reasonable opinion, further representation would not benefit the Client; (b) the Client is found to have misrepresented or concealed facts concerning the case; (c) the Client refuses to obey a court order that the Legal Representative has advised the Client to obey; or (d) the financial circumstances upon which the Client was accepted by SALSA change significantly.

I have read, understand, and agree to the terms in this Agreement.

|  |  |  |
| --- | --- | --- |
| Client’s SignatureDate |  | Legal Representative’s SignatureDate |

**Appendix M: Letter to Client Regarding Failure to Contact Volunteer Attorney**

(Volunteer Letterhead)

(DATE)

Client’s Information

**Re: SALSA Representation – SALSA case number**

Dear Client’s Name:

 I am the attorney who has agreed to take your (insert type of case, e.g., consumer, title, etc.) case on a *pro bono* basis through San Antonio Legal Services Association. On (Insert date of client letter), you were sent a letter that told you to contact me as soon as possible; however, I have not heard from you.

 I need to speak with you right away so that I can represent you effectively. Please contact me immediately at (insert your number), so that we can schedule an appointment. I cannot represent you unless you get in touch with me. If you no longer need a lawyer, please call and let me know. If I do not hear from you within 10 days, I will assume that you no longer need representation, and I will close your file in this office. I will also inform SALSA that you have not contacted me, and SALSA may disqualify you from receiving legal assistance through their program.

 I look forward to working with you.

Sincerely,

 (Insert your name)

cc: San Antonio Legal Services Association

**Appendix N: Initial Status Report Form**

\*This form is available on SALSA’s Website - https://www.sa-lsa.org/volunteer/status-reports/

**INITIAL STATUS REPORT**

|  |  |  |  |
| --- | --- | --- | --- |
| Client: |  | Date Referred:  |  |
| Case Number:  |  | Type of Case:  |  |

1. **I have undertaken representation of the client. Yes ( ) No ( )**
	1. **If not, why not?**
2. **Brief summary of action taken to date:**
3. **Next Steps:**
4. **What can we do to help you?**
5. **Do you need a mentor?**

**Appendix O: Status Report and Case Closure Report**

\*This form is available on SALSA’s Website - https://www.sa-lsa.org/volunteer/status-reports/



Status Report and/or Case Completion Form

\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 2021

Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_:

 Want to prevent those persistent SALSA follow-up phone calls and emails about your SALSA case? Just return your status report! This is both a best practice and a requirement for SALSA’s funders.

Thank you for accepting a pro bono case with SALSA. SALSA tracks the status of each case we refer at regular intervals. **Please reply to this email with your responses within 5 business days.**

|  |  |  |  |
| --- | --- | --- | --- |
| Client: |  | Date Referred:  |  |
| Case Number:  |  | Type of Case:  |  |

1. Is the case open? *If yes, please complete a-d below*. **If no, skip to question 2**.
	1. If open, what have you done to help your client so far?
	2. What are the next steps in your representation?
	3. Is there anything SALSA can do to help you with this case
	4. Do you have a mentor? If no, would you like a mentor?
		1. If yes, name of mentor:
		2. How is your experience with your mentor?
2. Is the case closed? *If yes, please complete a-d below.*
	1. Please explain in 2-3 sentences how the case was resolved.
	2. Please attach a closing letter sent to client, and any other final documents.
	3. Approximately how many hours did you spend on the case?
	4. When can you accept another case?
	5. Please provide feedback regarding the volunteer experience.

THANK YOU FOR PARTNERING WITH SALSA TO ACHIEVE JUSTICE FOR ALL!

**Appendix P: Letter to Client from Attorney Re Case Closure**

|  |  |  |
| --- | --- | --- |
| San Antonio Legal Services Association  P.O. Box 12404, San Antonio, TX 78212 Fax (210) 855-9059 [www.sa-lsa.org](https://word-edit.officeapps.live.com/we/www.sa-lsa.org%22%20%5Ct%20%22_blank)  |   | **Macintosh HD:Users:katdoucette:Desktop:CJP:SALSA Logo - color.pdf**  |

\_\_\_\_\_\_\_\_\_\_\_\_, 2021

VIA EMAIL:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Re: Conclusion of Services and Closure of Case File

Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_:

It has been a pleasure serving you in \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Please find enclosed the following documents, which are the last you’ll need to complete your case.

(Document 1)

Now that the matter has been completed and you have in your possession all final documents, please let this letter serve as conclusion of representation. I will close your file with my office and submit a copy of this closing letter to SALSA so that SALSA can also close your file.

It has been a pleasure serving you. I wish you all the best in your endeavors.

Sincerely,

cc: San Antonio Legal Services Association

|  |  |  |
| --- | --- | --- |
| San Antonio Legal Services Association  P.O. Box 12404, San Antonio, TX 78212 Fax (210) 855-9059 [www.sa-lsa.org](https://word-edit.officeapps.live.com/we/www.sa-lsa.org%22%20%5Ct%20%22_blank)  |   | **Macintosh HD:Users:katdoucette:Desktop:CJP:SALSA Logo - color.pdf**  |

\_\_\_\_\_\_\_\_\_\_\_\_, 2021

VIA EMAIL:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Re: Termination of Services and Closure of Case File

Dear \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_:

Based on our discussions, it has become clear that your wishes or goals for this case extend beyond the scope of our engagement agreement; therefore, I can no longer represent you in this matter. Please let this letter serve as termination of representation. I will close your file with my office and submit a copy of this closing letter to SALSA so that SALSA can also close your file.

It has been a pleasure serving you. I wish you all the best in your endeavors.

Sincerely,

cc: San Antonio Legal Services Association

**Appendix Q: Setting Up a Free Google Voice Phone Number\***

**If you do not have a Google account:**

* Go to www.gmail.com
* Your mobile number will be kept private, but you do not have to provide your phone number or a current email address.

**After you have logged into your Gmail account:**

* Go to www.google.com/voice
* Accept the Privacy Policy and Terms and Conditions, then click proceed.
* A “Set up your Google Voice number” message will pop up. Click “I want a New Number.”
* Enter the number to which you would like the calls to forward (your personal number).
* Hit call me now and confirm that your phone number is working by following the directions on the call. Reminder: you will not be able to attach your phone number to more than one Google Voice number.
* Once you have verified your forwarding number, a “Choose your number” window will appear. Enter the area code that you would like to use. If you do not have a preference, you may use your zip code or the 210-area code to generate a list of available numbers. Select your preferred number and click continue.
* You now have a Google Voice phone number to provide to clients.

**To change preferences:**

* Go to www.google.com/voice
* Click on the gear icon at the top right and click “Settings” to explore the various options, including recording your personal voice message.

**To set times when your personal phone should ring:**

* Click the gear for settings.
* Select the “Phones” tab.
* Click the “Edit” button under your personal phone number.
* Click the “Show advanced settings” link.
* In the “Ring Schedule” section, selection your option. To make sure a phone does not ring at a specific time of the day, select “Use custom schedule” and enter your time range.
* Click “Save” at the bottom of the page.

**Call screening is turned on by default. There are two ways your calls are screened:**

* The caller's phone number shows on your Caller ID display. There is an option in your Google Voice settings to change the Caller ID, so that “Google Voice” shows on your caller ID.
* Google Voice asks callers to speak their name. So even with unknown names and numbers, you will hear the caller's name when you pick up.
* After picking up, you have three ways to handle the call:
	+ Accept it: Press 1.
	+ Send it to voicemail: Press 2.
	+ Listen in on the voicemail: Press 2 and stay on the line.
* Google Voice stores callers' spoken names so they will not be asked for it again.
* You must log into your Google voice account to check voicemails left for that number.

**You may download the Google Voice app to make calls from your Voice number on your phone. If you are making a call directly from your personal phone number, and would like to block your personal number, dial \*67 before you dial the client’s number.**

\*SALSA does not require volunteers to set up a separate phone number. These directions are for volunteers who wish to have a separate number to provide to clients. Please view the Google Voice Acceptable Use Policy here: https://www.google.com/googlevoice/program-policies.html.