

# Don't Bully Me (DBM) Project

## Instructions for Online Intake on LegalServer

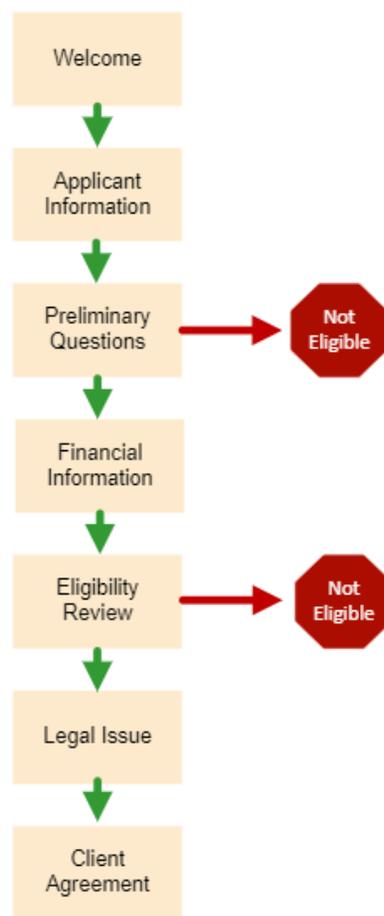
*Thank you for volunteering as an Intake Volunteer for the Don't Bully Me Project. This document will provide you with instructions for how to use LegalServer's Online Intake.*

### How to Access the Online Intake Form

You will find the online intake form at this link [here](#). Please have this page loaded on your browser before you call the applicant. However, do not pull this page up more than five minutes before calling the applicant because there will be a risk that it will time out.

### Roadmap of LegalServer Online Intake

The graphic below shows the different stages of the online intake that you will walk through with an eligible applicant.



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### General Guidelines

*Who is the applicant?* The person you are speaking with on the phone is considered the applicant. As a result, please collect information about the caller rather than the child experiencing the bullying behavior.

*Asterisks (\*)* indicate that the field is required to be completed.

### Welcome Page

On this first page of the online intake, you will select "Yes" and then  .

### Applicant Information Page

All fields with an asterisk (\*) are required to be completed.

*Applicant's Name:* Complete these fields about the individual you are speaking with on the phone.

*Address:* Identify the applicant's home address.

*Client Demographics:* Complete all these fields.

Select  to proceed to the next page.

### Preliminary Questions Page

*Represented by an attorney:* If the applicant indicates that an attorney is currently providing representation on this matter, please read the text that will display on the screen and end the online intake with the applicant.

*Household Size:* Please collect information on the number of adults aged 18 and older in the household and the number of individuals in the household who are under 18.

*Armed services:* Ask the applicant the questions regarding any connections to the U.S. Armed Services. If the applicant has multiple connections, hold the CTRL key to select more than one option.

Select  to proceed to the next page.

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### **Financial Information Page**

*Income Information:* Ask the applicant whether anyone in the household has income. For all individuals in the household who have income, please ask the amounts and frequency of each type of income displayed on the chart. When there is more than one member of the household with income, please add a new row for each of the displayed types of income for each member with a source of income. The types of income that should be asked of each household member with income are displayed below:

1. Employment
2. Child Support
3. Pension/Retirement
4. Social Security/SSDI
5. SSI
6. VA Disability

Each row must be completed even if that is not a source of income for the applicant. Enter "0" for the amount for each income type that is not a source of income.

*Asset Information:* Ask the applicant about the household's assets. Please ask the applicant about each of these types of assets that are in the list below:

1. Real Estate (Home)
2. Real Estate (Non-Home)
3. Vehicles used for transportation
4. Vehicles NOT used for transportation
5. Current balance of any checking and savings accounts
6. Current value of any 401(k)/Pension/IRA
7. Other: income-generating assets
8. Other: non-attachable assets
9. Other: any assets that are not included in any of the categories listed above

*Assets Table:* For every asset from the list above that the applicant indicates is an asset of the household, use the plus sign to add a new row in the table. In that row, you will identify the type of asset and the amount.

Do not select or deselect the "Exclude" checkbox.

*No Assets:* If the applicant states that there are no household assets, click on the "Please Select" dropdown menu in the Asset column and select "No Assets."

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Select  to proceed to the next page.

### Eligibility Pages

You will click through two pages of short text about the eligibility screening that is being processed in the background of the online intake.

Simply select  to proceed to the next pages.

### Legal Issue Page

*Name of Parent(s) of Child Engaged in Bullying Behavior:* Ask the applicant whether the name of a parent or both parents of the child engaged in the bullying behavior is known.

*If Yes:* Enter the information for the parent of the child engaged in bullying behavior. If both parents' information is known, please select the plus sign to create additional fields to enter that second parent's information.

*If No:* The goal is to collect any information that may be helpful in eventually identifying the parent(s) of the child engaged in the bullying behavior. Ask the applicant whether the applicant has knowledge of any of the following:

- Name of the child engaged in the bullying behavior
- Username or online name of the account from which the bullying occurs
- School that the child engaged in the bullying behavior attends
- Employer of the parents of the child engaged in the bullying behavior

Use the textbox to describe as much about the information that you can collect from the applicant.

Select  to proceed to the next page.

### Client Agreement Page

Please provide the applicant with the following information. For each bullet point, please verbally confirm with the applicant that they understand.

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- As part of your application for legal assistance through the Don't Bully Me project, you consent to sharing the information in this application with the DBM project partners – San Antonio Legal Services Association, Legal Aid of Northwest Texas, Dallas Volunteer Attorney Program, Lone Start Legal Aid, and Houston Volunteer Lawyers.
- The DBM project partners do not represent the applicant. A DBM project partner will contact the applicant if they are able to find a lawyer to assist.
- Representation by an attorney will not begin until the attorney and the applicant sign an engagement letter prepared by a DBM project partner that details the scope of the representation.

After the applicant confirms understanding of all the above, select  to proceed to the next page.

### **Completing the Intake**

Once you have completed the online intake, you will see a screen that states:

**Your Online Application is Complete**

To close out the call, kindly share that you recognize that this may be a difficult time for you and your child, but to please remember to take care of yourself. You need to be the best you can be to help your child get through this.

Ask the applicant whether it would be helpful to have the number for a local mental health authority in case the applicant or someone else needs it.