

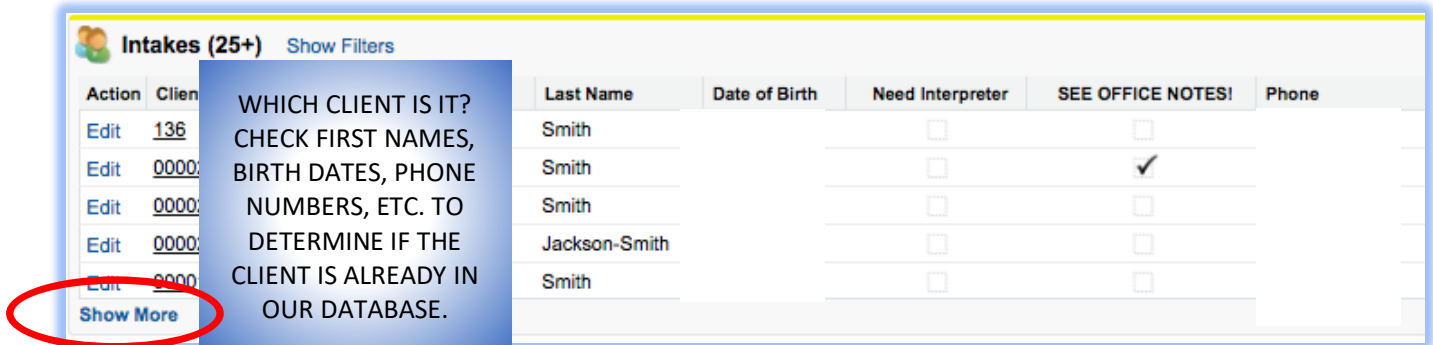
MVLC Client Database Guide for Volunteers

www.theMVLC.force.com

1. Search client last name in search bar.



2. Determine whether the client is already in the system. Click **SHOW MORE** to see additional pages of results. To see similar names, search a few letters followed by an asterisk. For example, search “Sm*” to see all names starting with those letters.



WHICH CLIENT IS IT?
CHECK FIRST NAMES,
BIRTH DATES, PHONE
NUMBERS, ETC. TO
DETERMINE IF THE
CLIENT IS ALREADY IN
OUR DATABASE.

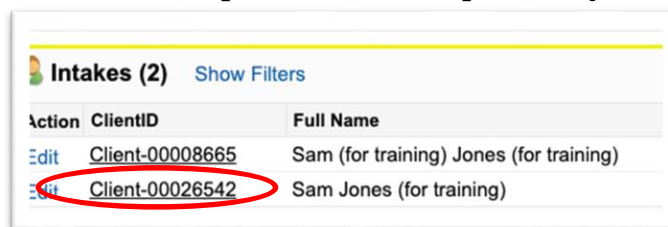
Action	Client	Last Name	Date of Birth	Need Interpreter	SEE OFFICE NOTES!	Phone
Edit	136	Smith		☐	☐	
Edit	0000	Smith		☐	☒	
Edit	0000	Smith		☐	☐	
Edit	0000	Jackson-Smith		☐	☐	
Edit	0000	Smith		☐	☐	

Work carefully to avoid duplicating a client that is already in the database. If you notice duplicates in the system, tell a supervisor.

You can also search by a client’s phone number or confirm whether the client is already in the system by looking at the phone number and birth date.

If you cannot find a client, you need to make a new profile. Skip ahead to step # 6.

3. If the client is already in the database, open their intake profile by clicking on the Client ID.



Action	ClientID	Full Name
Edit	Client-00008665	Sam (for training) Jones (for training)
Edit	Client-00026542	Sam Jones (for training)

- Confirm with the client that the information in their intake profile is still accurate. Make updates as needed using the “Edit” function.

Intake
Client-00008665

[MVLV Visits \(3\)](#) | [MJC Forms Visits \(0\)](#) | [EPC Visits \(0\)](#) | [Upcoming/Past Appointments \(0\)](#) | [Calls \(0\)](#) | [Small B](#)

Intake Detail Edit Delete

Client Information

First Name	Sam (for training)	Gender	Male
Middle Name		Race	Mixed
Last Name	Jones (for training)	Marital Status	Single
Suffix			
Business Name		Public Benefits	Food Share
A.K.A		Housing Type	Rent
Date of Birth (xx/xx/xxxx)	12/1/1972	Number of Adults in Household	1
DOB Not Provided	☐	Number of Minors in Household	2
Consent to receiving text messages?	☒	Monthly Household Income (before taxes)	\$501-\$1,000
Language for Survey	English	Do you currently have a paying job?	Yes
Preferred Mobile Phone	(414) 222-2222	Veteran/Active Duty Service Member	☐
Home Phone		Wufoo #	
Email	sam@email.com		
Address	1234 Main Street		
City	Milwaukee		
State	Wisconsin		
Zip	55555		

Mr. Jones, are you still on Main Street? Is your phone number still 222-2222?

- When a client has been here before, review their recent visit notes with the volunteer attorney by clicking on the Visit ID for each prior visit date. You may need to step away to consult with a supervisor. Then, jump to step 8.

MVLC Visits						
New MVLC Visit						
Action	VisitID	Visit Date	Legal Issue 1	Service Location	Status	ALERT NOTES
jit Del	MVLC-00019483	8/19/2021 3:15 PM	Eviction	MVLC @ HOP	Completed, Seen	Mr. Jones has been calling frequently asking the same questions repeatedly. He may need extra patience from volunteers if he returns.
jit Del	MVLC-00010488	1/23/2019 12:51 PM	Small Claims	MVLC @ HOP	Completed, Seen	
jit Del	MVLC-00006798	5/14/2018 12:22 PM	Probate	MVLC @ MJC	Completed, Seen	
jit Del	MVLC-00006787	5/8/2018 4:07 PM	Probate	MVLC @ HOP	Completed, Seen	

6. If the client is not in the system, create a new client. In the **INTAKE** tab, select **NEW**.

Intakes Home

View: a [Go] Edit | Create New View

Recent Intakes

New

ClientID
00001134

7. Enter as much data as the client would like to provide. Press **SAVE**.

Intake Edit

Save Save & New Cancel

Information

First Name
Middle Name
Last Name
Date of Birth 9/25/1977 [9/25/2017]
Gender --None--
Race --None--
Marital Status --None--
Public Benefits Available: Badger Care/ Medicaid, Food Share, SSI/SSDI, SSI for Children, Unemployment Compensation, VA-Benefits, W2, Worker's Compensation. Chosen: []
Housing Type --None--
Number of Adults in Household 1
Number of Minors in Household 0
Monthly Household Income (before taxes) --None--
Do you have paid employment? --None--
Need Interpreter []
Veteran/Active Duty Service Member []
Phone
Email
Address
City Milwaukee
State Wisconsin
Zip
SEE OFFICE NOTES! []
Save Save & New Cancel

8. Select **NEW MVLC VISIT**.

MVLC Visits

New MVLC Visit

Action	VisitID	Visit Date	Legal Issue 1	Service Location	Status
Edit	00000555	7/12/2017 2:00 PM	Small Claims	MVLC @ UCC	Completed, Seen

9. Review the Explanation of Clinic Services with the client. Ask if they have any questions. The client keeps the paper version. Check the box in Salesforce showing the client receive it.

MVLC Visit

MVLC-00018839

Back to List: Custom Object Definitions

MVLC Visit Detail

Edit Delete

For Volunteers

Client Name
Visit Date 6/19/2021 1:00 AM
Status Completed, Seen
Service Location MVLC @ Remote Services
If Special Clinic
Received Explanation of Services [x]
Case Category Family & Safety

- Take clear notes for future use by clinic staff and the client. Use the Notetaking Guide as a reference. Press **SAVE** which will allow you to see the “printable view” button.

The screenshot shows the 'New MVLC Visit' form. At the top, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The 'Save' button is circled in red. Below the buttons, the form is divided into two main sections: 'For Volunteers' on the left and 'Required Information' on the right. The 'For Volunteers' section includes fields for 'Service Location', 'If Special Clinic', 'Volunteer Law Student', 'Volunteer Lawyer', 'Interpreter Name (if present)', 'Statement of Facts', 'Legal Questions Presented', and 'Legal Advice Provided'. The 'Required Information' section includes fields for 'Visit Date', 'Case Category', 'Legal Issue 1', 'Legal Issue 2', 'Referral Made', 'Second Referral Made', 'Lawyer will follow up after visit', and 'Fee Waiver Completed'.

- Print notes for the client. After you press SAVE (as instructed above), you will **select today’s visit** from the MVLC Visits list. You will now have the option to open the notes in a printable view.

The screenshot shows the 'Intake Detail' form. At the top, there are tabs for 'Intakes', 'MVLC Visits', 'MJC Forms Visits', 'M-LINC Intakes', and 'M-LINC Visits'. The 'Intake Detail' section is active. Below it, there is a table with client information. The 'Visit Date' field is circled in red. The table has columns for 'Action', 'VisitID', 'Visit Date', 'Legal Issue 1', 'Service Location', 'Status', and 'Office Notes'. The 'Visit Date' field is currently set to '7/12/2017 2:00 PM'.

12. Select **Printable View**. Take a few moments to discuss your notes with the client and provide any necessary clarifications. Print one copy for client to take with them.

The screenshot shows the 'MVLC Visit Detail' form. At the top, there are tabs for 'Intakes', 'MVLC Visits', 'MJC Forms Visits', 'M-LINC Intakes', and 'M-LINC Visits'. The 'MVLC Visits' tab is active. Below the tabs, the form displays 'MVLC Visit 00000555' and a 'Back to List: Intakes' link. A 'Printable View' link is circled in red in the top right corner. The form is titled 'MVLC Visit Detail' and includes an 'Edit' button. It contains several sections: 'For Volunteers' with fields for Service Location (MVLC @ UCC), Visit Date (7/12/2017 2:00 PM), Case Category (Housing & Apartment), Volunteer Law Student (Kendall), Legal Issue 1 (Small Claims), Volunteer Lawyer (Jake), Legal Issue 2, Interpreter Name (if present), Referral Made, and Statement of Facts (Tenant evicted 3x, Worried that her belongings have been stolen; case worker claims they are at old (group?) home, when she and a friend went to house to see items, the woman never met her and cannot contact anyone else). There are also checkboxes for 'Legal Questions Presented', 'Lawyer will follow up after visit', 'Legal Advice Provided', 'Fee Waiver Completed', 'Out Time' (7/12/2017 3:00 PM), 'Will', 'Living Will', 'POA for Finances', and 'POA for Healthcare'.

13. Go back to the Intakes page. Make sure you never leave a client's information pulled up on the screen for others to see.

The screenshot shows the 'New Intake' form. At the top, there are tabs for 'Intake Edit' and 'New Intake'. The 'New Intake' tab is active. Below the tabs, the form displays 'Intake Edit' and 'New Intake' buttons. The form is titled 'Intake Edit' and includes 'Save', 'Save & New', and 'Cancel' buttons. It contains several sections: 'Information' with fields for First Name, Middle Name, Last Name, Date of Birth (9/25/1977), Gender, Race, Marital Status, Public Benefits, Housing Type, Number of Adults in Household (1), Number of Minors in Household (0), Monthly Household Income (before taxes), Do you have paid employment?, Need Interpreter?, and SEE OFFICE NOTES! (checkbox). There is also a 'Chosen' dropdown menu.