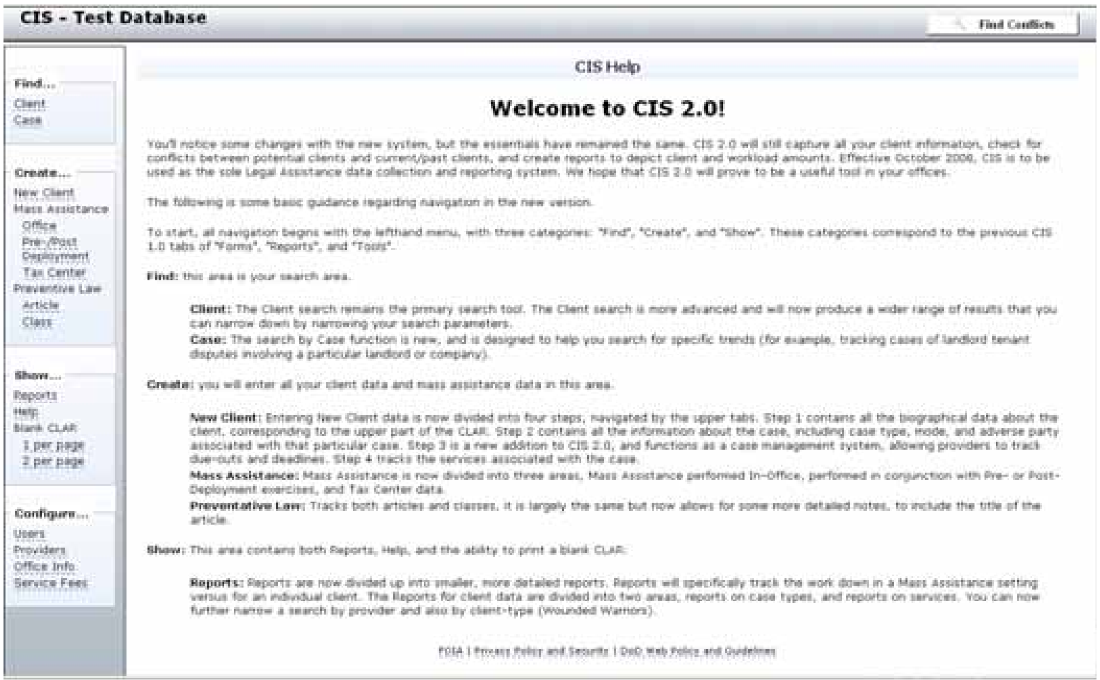
Client Information System

Version 2.0, February 2009

User Manual



Information Technology Division (ITD)
Office of the Judge Advocate General's Corps
901 N. Stuart St., Suite 1202
Arlington, VA. 22203

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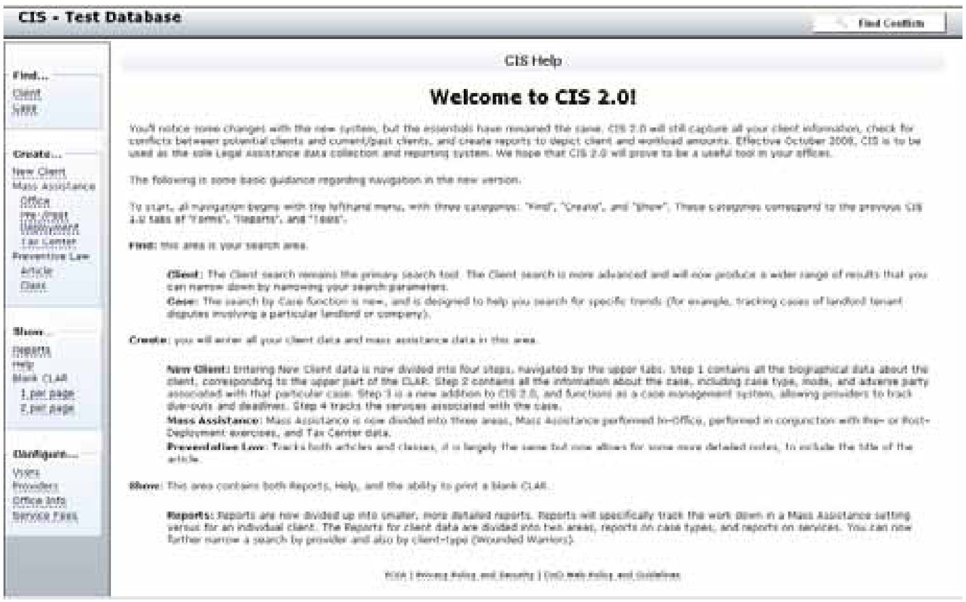
Introduction

CIS (Client Information System) is a secure, web-based case management tool the **OTJAG** (Office of the Judge Advocate General) **ITD** (Information Technology Division) created to assist **LA** (Legal Assistance) offices with recording client information and tracking the services provided to each client. **CIS** lets users enter details about clients, cases, mass assistance, preventive law articles and classes, as well as create reports. In addition, an **Administrator** function is available for those users designated as Administrators.



Technical Support Questions? Contact: The Information Technology Division Help Desk, 901 North Stuart Street, Suite 1202, Arlington, VA 22203, Telephone: **703.588.2560**.

User Feedback Welcome. You can email questions, comments, or additional requirements to:

itdhelpdesk@jagc-smtp.army.mil

User feedback pertaining to substantive development issues will be staffed through the proponent office.

1 Getting Started

Before you can use **CIS**, you must log in to JAGCNet with an **AKO** (Army Knowledge Online) username and password or a registered **CAC** (Common Access Card) and **PIN** (Personal Identification Number). A JAGCNet account is also required. Contact the ITD Help Desk at 703-588-2560 for assistance if you do not already have a JAGCNet account. Contact the AKO Help Desk at 703-704-4357 (DSN 312-654-4357) if you do not already have an **AKO** user name and password.

The different levels of **CIS** access are described in the **Description of User Access Levels** box, below:

Description of User Access Levels

Readers – A **Reader** includes any **CIS** user who can read cases and clients but may not update cases or clients.

Editors – An **Editor** includes any **CIS** user who can read, create, edit, or delete cases and clients, as well as run reports.

Administrator – An **Administrator** includes any **CIS** user who has permission to perform all **CIS** functions, including running reports, adding users, providers, updating office information, as well as updating service fees. Administrator status is usually reserved for your local Chief Legal Administrator or Chief of Legal Assistance.

While this manual is intended for all **CIS** users, if you need additional information about Administrator-specific tasks, please see Appendix A, CIS Administration. You should also review Appendix B, Case Types and Service Types Indices, to familiarize yourself with the new case types and service types now available in CIS 2.0.

Like JAGCNet, **CIS** is best viewed in Internet Explorer 5.5, or higher, with a 1024x768 resolution.

1.1 Accessing the Application

To access **CIS**, perform the following steps from your open web browser:

1. Enter **www.jagcnet.army.mil** in your browser's **Address** line.

2. Press **Enter**.

The JAGCNet Portal Screen appears:

Figure 1.1 JAGCNet Portal Screen

You can log in to **CIS** with a CAC Login or an AKO Login from the upper-left corner of the JAGCNet Portal Screen. Select your preferred log in method and follow the corresponding directions, below:

<u>CAC Login</u>

A CAC Login is one form of authentication for accessing **CIS**. This method of authentication requires that you have a **CAC** and a **PIN**. If you do not have a **CAC** and a **PIN**, use the AKO Login as your default login method.

To use a CAC Login, perform the following steps from the JAGCNet Portal Screen:

1. Click **CAC Login (**from the **Log-in** portion of the JAGCNet Portal Screen, directly above).

The DoD Notice and Consent Banner Screen appears:

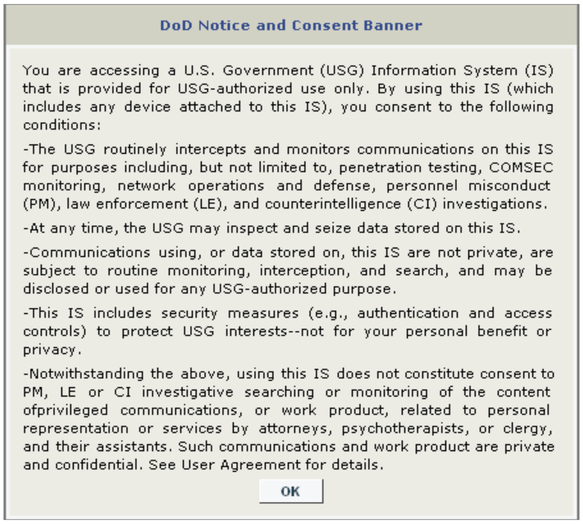


Figure 1.2 DoD Notice and Consent Banner Screen

2. Click **OK**.

The ActivClient Login Screen appears:

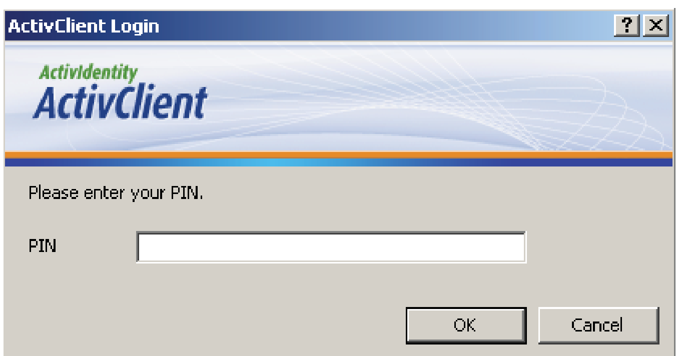


Figure 1.3 ActivClient Login Screen

3. Enter your **PIN** in the **PIN** field *(**Note**: Press your **Num Lock** key on your keyboard's keypad to enter numbers from your keypad. Alternatively, you can use the numbers above your top keyboard row to enter your **PIN**.).*

4. Click **OK**.

The Secure JAGCNet Portal Screen appears:

Figure 1.4 Secure JAGCNet Portal Screen

5. Click **Legal Assistance** (from the right side of the Secure JAGCNet Portal Screen).

The Legal Assistance Screen appears:

Figure 1.5 Application Catalog Screen

6. Click the desired **CIS** database (from the **Legal Assistance** list in the center of the screen).

The CIS Homepage Screen appears (***Note****: See Section 1.2, Viewing the Homepage, below, for additional information about the* ***CIS*** *homepage.).*

-or-

<u>AKO Login</u>

An AKO Login is another form of authentication for accessing **CIS**. This method of authentication requires that you have an **AKO** user name and password. Contact the AKO Help Desk at 703-704-4357 (DSN 312-654-4357) if you do not already have an **AKO** user name and password.

To use an AKO Login, perform the following steps from the JAGCNet Portal Screen:

1. Click **AKO Login (**from the **Log-in** portion of the JAGCNet Portal Screen).

The DoD Notice and Consent Banner Screen appears:

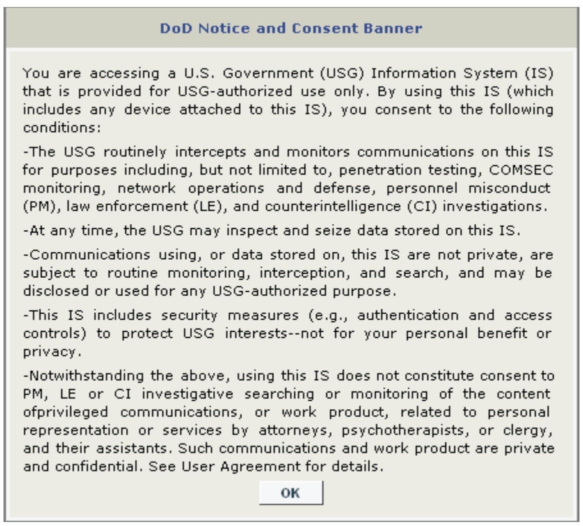


Figure 1.6 DoD Notice and Consent Banner Screen

2. Click **OK**.

The Connect to www.jagcnet2.army.mil Screen appears:

Figure 1.7 Connect to www.jagcnet2.army.mil Screen

3. Enter your user name in the **User name:** field.

4. Enter your password in the **Password:** field.

5. Click **OK**.

The Secure JAGCNet Portal Screen appears:

Figure 1.8 Secure JAGCNet Portal Screen

6. Click **Legal Assistance** (from the right side of the Secure JAGCNet Portal Screen).

The Legal Assistance Screen appears:

Figure 1.9 Application Catalog Screen

7. Click the desired **CIS** database (from the **Legal Assistance** list in the center of the screen).

The CIS Homepage Screen appears (***Note**: See Section 1.2, Viewing the Homepage, below, for additional information about the **CIS** homepage.).*

1.2 Viewing the Homepage

After initial login, **CIS** directs you to the CIS Homepage Screen, which appears below (See Section 1.1, Accessing the Application, above, for additional information about accessing **CIS**.).:

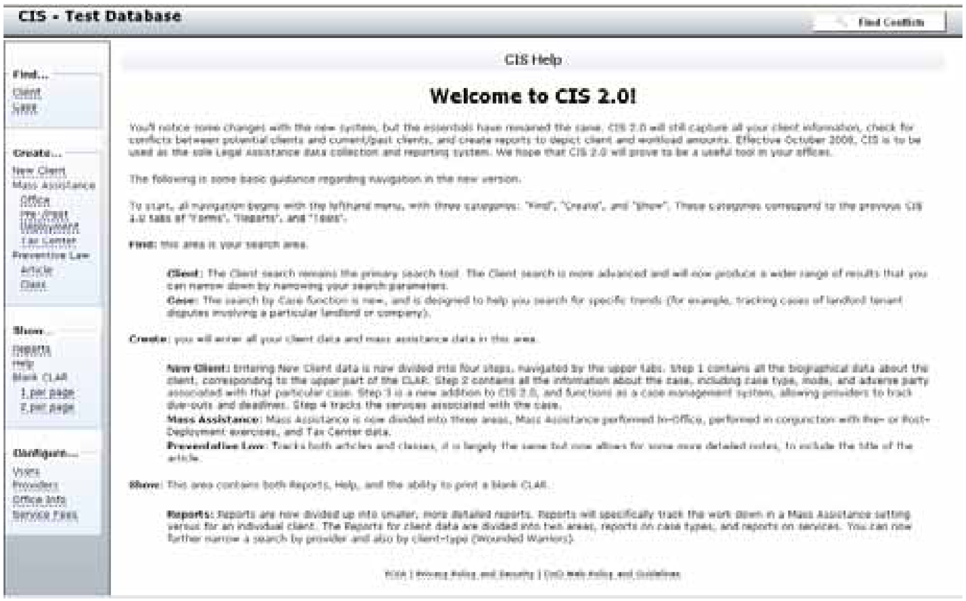


Figure 1.10 CIS Hompage Screen

You can access **CIS**'s functionality directly from the CIS Homepage Screen. Each section of this screen is described below:

<u>Main Screen</u>

The following sections appear in the main area of the CIS Homepage Screen:

- **Main Menu** (on the left side of the screen) contains all **CIS** menus, such as **Find**, **Create**, **Show**, and **Configure** *(**Note:** The **Configure** portion of the Main Menu is visible to users designated as Administrators. Only current Administrators can designate other users as Administrators.).*

- The **Welcome to CIS 2.0!** portion of the screen is the default homepage for **CIS**. This area of the screen provides you with a high-level description of **CIS** functionality. In addition, **ITD** will also use this screen to alert users when changes are made to **CIS**.

<u>Top of Screen</u>

The following button appears across the top of the CIS Homepage Screen:

- Click the **Find Conflicts** button (from the upper-right side of any **CIS** screen) to be directed to a secondary screen where you can search for any conflicts between a potential client and an adverse party. Simply enter each party's first and last names, as well as the last four digits of their **SSN**, if known. *(**Note:** The more exact your search data is, the more limited your results will be. In addition, you will be able to examine the potential Conflict's information.)*

Click **Search**. A screen appears listing the following potential conflict types:

1. Your potential client may be an adverse party in these cases
2. Your potential client may be the spouse of one of these clients
3. Your potential client's adverse party may be one of these clients

Click to close the **Find Conflicts** window.

See Section 2.1, Conflicts, for a detailed discussion about how to search for potential conflicts.

<u>Bottom of Screen</u>

The following links appear across the bottom center of the CIS Homepage Screen:

- Click **FOIA** to read how **Freedom of Information Act** (FOIA) requests impact OTJAG.

- Click **Privacy Policy and Security** to read the JAGCNet Privacy Policy.

- Click **DoD Web Policies and Guidelines** to read about DoD Web Policies and Guidelines.

2 Actions

Under the **Find** area on the Main Menu, **CIS** lets you search for clients, cases, and conflicts. In addition, under the **Create** area on the Main Menu, **CIS** also lets you create and edit clients and cases, as well as create mass assistance data and preventive law data. All of these functions are described in the sections that follow.

2.1 Conflicts

The **Find Conflicts** feature lets you determine if any conflicts of interest possibly exist between your office and a potential client or an adverse party. This feature is important to use before undertaking any case or service within your office.

To find a potential conflict, perform the following steps from the any upper-right hand portion of any screen within **CIS**:

1. Click 

.

The Find Conflicts Screen appears:

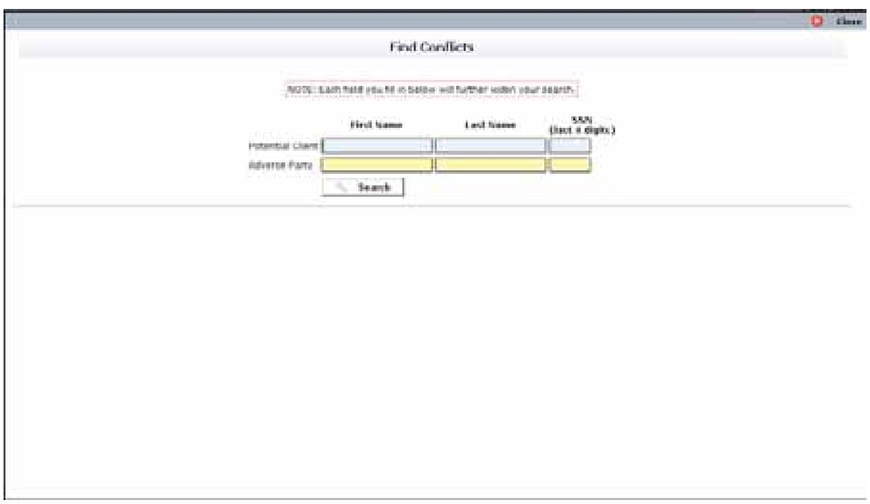


Figure 2.1 Find Conflicts Screen

*(**Note:** Each field you enter will enable you to further widen your search.)*

2. Enter the potential client's first name in the associated **First Name** field.

3. Enter the potential client's name in the associated **Last Name** field.

4. Enter the last four digits of the potential client's **SSN** in the **SSN** field.

5. Enter the adverse party's first name in the associated **First Name** field.

6. Enter the adverse party's last name in the associated **Last Name** field.

7. Enter the last four digits of the adverse party's **SSN** in the **SSN** field.

8. Click **Search**.

The Extended Find Conflicts Screen appears:

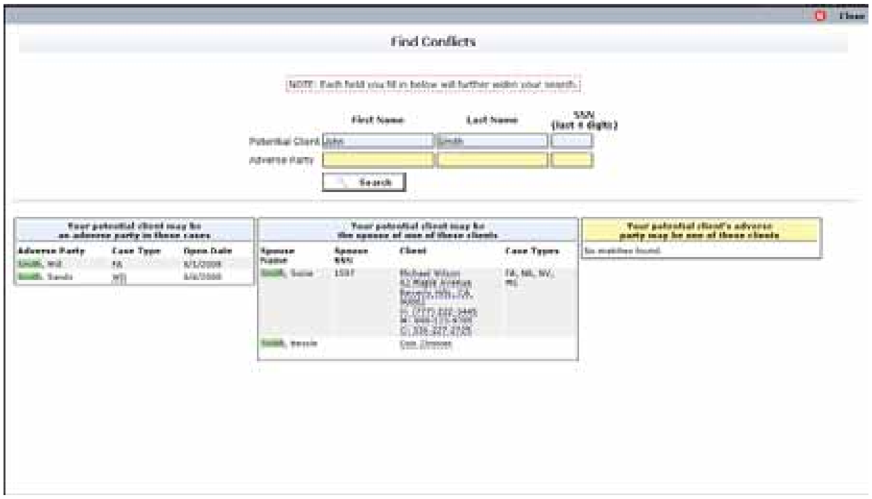


Figure 2.2 Extended Find Conflicts Screen

9. Click  to return to the **CIS** screen you were previously on.

2.2 Clients

Clients are those individuals who meet with a Legal Assistance attorney and for whom a client card is created or who visit a Legal Assistance office for a variety of reasons. **CIS** lets you search for existing clients, create client information, as well as edit client information. These features are described in the sections that follow.

2.2.1 Searching for a Client

Whenever a potential client contacts your office, you should perform a **Conflicts** search first. Next, you should then perform a **Client** search to determine if this client already exists in **CIS**.

To search for a client, perform the following steps from the **Find…** Menu, which is visible on the left-hand menu from any screen within **CIS**:

1. Click **Client**.

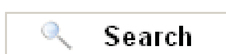
The Find a Client Screen appears:

Figure 2.3 Find a Client Screen

2. Enter the client's first name in the **First Name** field.

3. Enter the client's last name in the **Last Name** field.

4. Enter the last four digits of the client's **SSN** in the **SSN** field, if known.

5. Click .

Whenever a partial match is found, a Client List Screen, such as the one below, appears, allowing you to view possible matches. Whenever an exact match is found, **CIS** links you to that client's information.

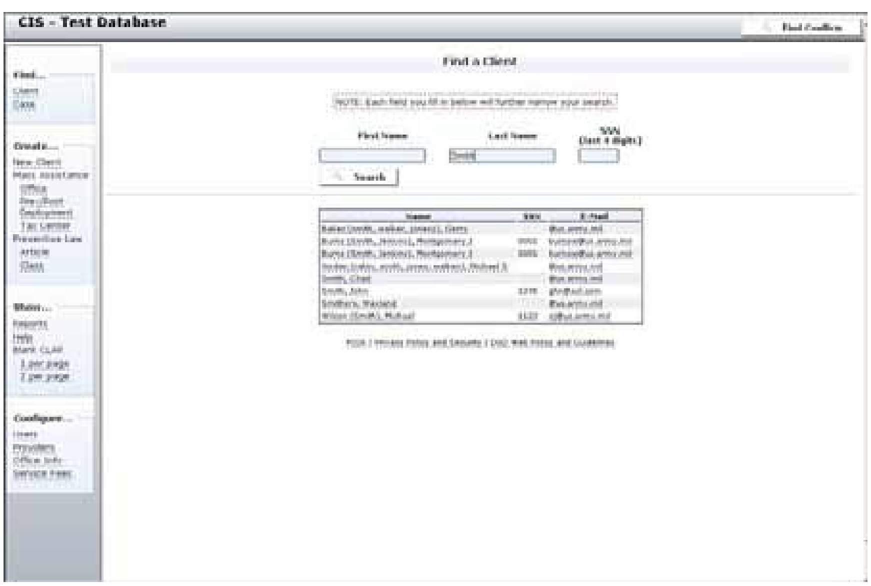


Figure 2.4 Client List Screen

6. For illustrative purposes, click **Smith, John** from the list of names on the screen.

The associated Client Screen appears:

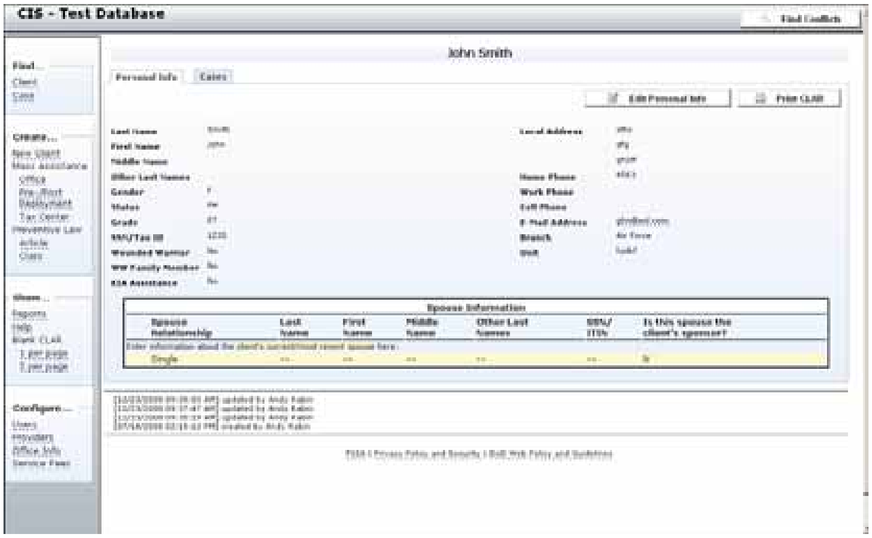


Figure 2.5 Client Screen

To edit the current screen, see Section 2.2.3, Editing a Client, below. To print a CLAR, see Section 4.2., Printing a CLAR, below. To add a case, see Section 2.3.2, Adding a Case, below.

2.2.2 Adding a Client

After you determine that a client does not already exist in **CIS**, you must create a client entry in order to proceed with entering the case.

To add a client, perform the following steps from the **Create…** Menu, which is visible from any screen within **CIS**:

1. Click **New Client**.

The Create New Client Screen appears:

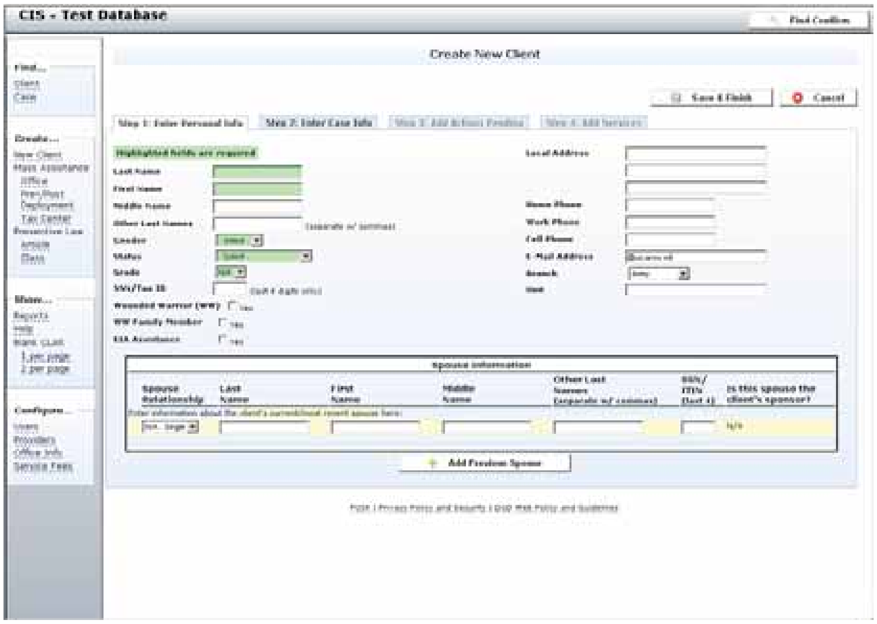


Figure 2.6 Create New Client Screen

*(**Note**: All required fields are highlighted in green. Also please note that you may not return to a previously completed tab until after you have entered all of the required information on the current screen. Therefore, ensure that all information you enter is correct before proceeding to the next tab.)*

2. Enter the client's last name in the **Last Name** field.

3. Enter the client's first name in the **First Name** field.

4. Enter the client's middle name in the **Middle Name** field.

5. Enter any other last names the client has used in the past in the **Other Last Names** field, ensuring that each name is separated by a comma.

6. Click the **Gender** drop-down menu and select the client's gender.

7. Click the **Status** drop-down menu and select the desired status.

8. Click the **Grade** drop-down menu and select the client's appropriate grade.

9. Enter the last four digits of the client's SSN or Tax ID in the **SSN/Tax ID** field.

10. Click the **Wounded Warrior** (WW) checkbox if the client is Wounded Warrior.

11. Click the **WW Family Member** checkbox if the client is a family member of a Wounded Warrior.

12. Click the **KIA Assistance** checkbox if the client required KIA assistance ***(Note:***

You can use this feature when assisting anyone related to a KIA case, including a Casualty Assistance officer.).

13. Enter the client's local address in the **Local Address** fields.

14. Enter the client's home phone number in the **Home Phone** field.

15. Enter the client's work phone number in the **Work Phone** field.

16. Enter the client's cell phone number in the **Cell Phone** field.

17. Enter the client's email address in the **E-Mail Address** field.

18. Click the **Branch** drop-down menu and select the client's applicable military branch.

19. Enter the client's unit name in the **Unit** field, if applicable.

20. Click the **Spouse Relationship** drop-down menu and select the client's correct marital status.

***(Note:** The following guidance is provided regarding the **Spouse Information** portion of the current tab: If your client is currently married, begin with the current spouse information. You should click **Add Spouse** if you need to enter information about the previous spouse. If the client is not currently married, but is divorced, you should start with the client's previous spouse information. You can click **Add Spouse** for as many spouses as needed.)*

21. Enter the last name of the client's current/former spouse in the **Last Name** field.

22. Enter the first name of the client's current/former spouse in the **First Name** field.

23. Enter the middle name of the client's current/former spouse in the **Middle Name** field.

24. Enter any other last names used by the client's current/former spouse in the **Other Last Names field**, ensuring that each name is separated by a comma.

25. Enter the last four digits of the current/former spouse's SSN or the Tax ID number in the **SSN/ITIN** field.

26. Click the **Is this spouse the client's sponsor?** checkbox if the spouse is the client's sponsor.

***(Note:** Click* 

if you need to add additional spousal information for the current client.)

27. Click the **Step 2: Enter Case Info** tab.

The Case Info Screen appears:

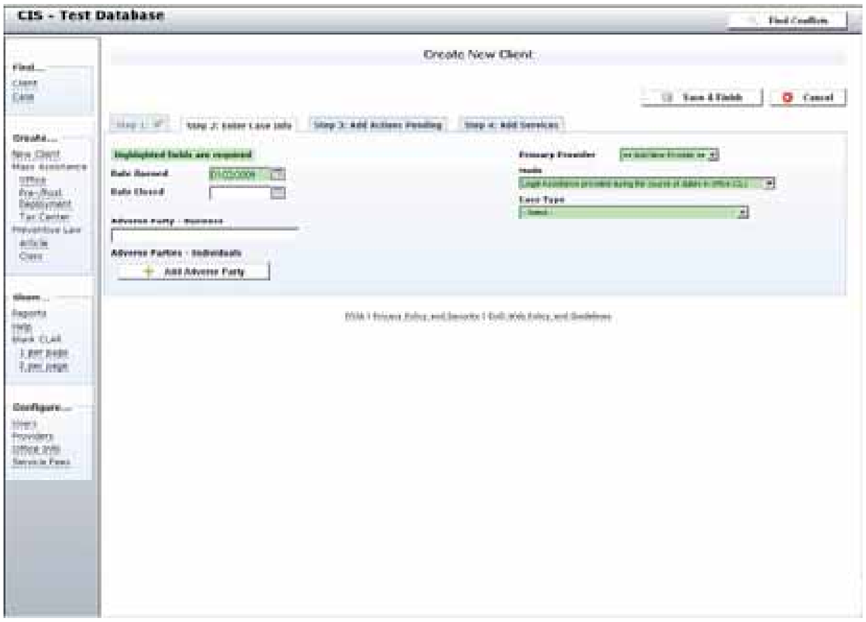


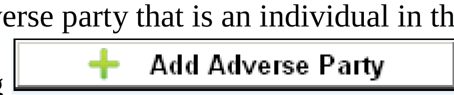
Figure 2.7 Case Info Screen

*(**Note**: All required fields are highlighted in green. Also please note that you may not return to a previously completed tab until after you have entered all of the required information on the current screen. Therefore, ensure that all information you enter is correct before proceeding to the next tab.)*

28. Enter a date in the **Date** field (to indicate the date you opened the case) or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date *(**Note:** The date is pre-populated with today's date; however, you can enter any date desired.).*

29. Enter a date in the **Date** field (to indicate the date you closed the case, when applicable) or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

30. Enter the name of any adverse party that is a business entity in the **Adverse Party – Business** field.

31. Enter the name(s) of any adverse party that is an individual in the **Adverse Parties – Individuals f**ield by clicking 

. *(**Note:** To remove an entry at a later time, simply click .)*

32. Click the **Primary Provider** drop-down menu and select the desired provider's name *(**Note:** You can add a provider name by selecting **++Add New Provider++** from the*

current drop-down menu. Simply enter all required fields in green and click 

to add the new provider to the current drop-down menu.)

33. Click the **Mode** drop-down menu and select the method by which your office provided the legal assistance to the client.

34. Click the **Case Type** drop-down menu and select the type of case that applies to the client's current case.

35. Click the **Add Actions Pending** tab.

The Add Actions Pending Screen appears:

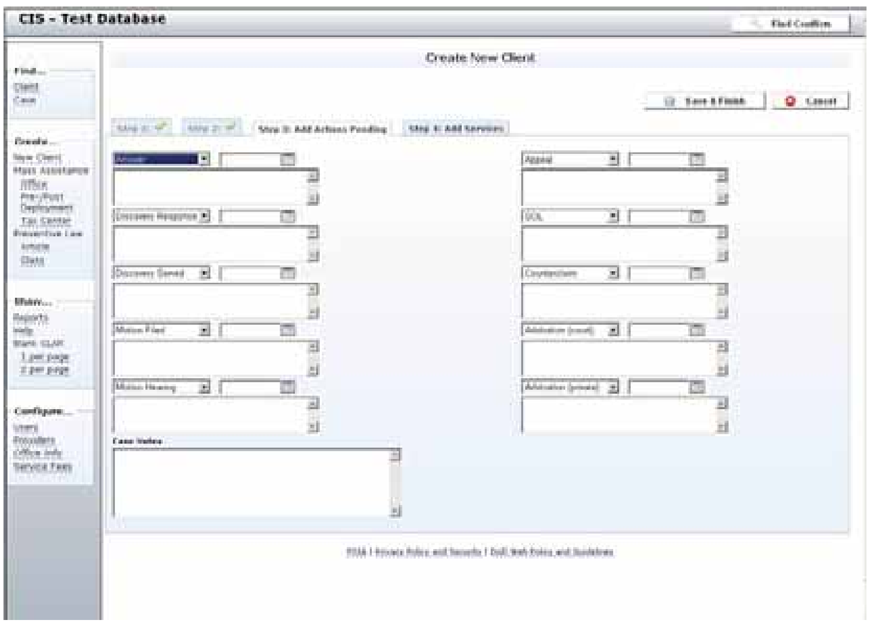


Figure 2.8 Add Actions Pending Screen

*(**Note**: None of the fields on the Add Actions Pending Screen are required. Also please note that you may not return to a previously completed tab until after you have entered all of the current client information. Therefore, ensure that all information you enter is correct before proceeding to the next tab.)*

The **Add Actions Pending** tab gives you several areas where you can note any pending actions about the current case. With each of these areas, you can note the date the pending action began as well as include notes in an accompanying scrollbox. The bottom of the screen contains a scrollbox where you can add general case notes.

36. Click the **Add Services** tab.

The Add Services Screen appears:

Figure 2.9 Add Services Screen

37. Click 

.

The Extended Add Service Screen appears:

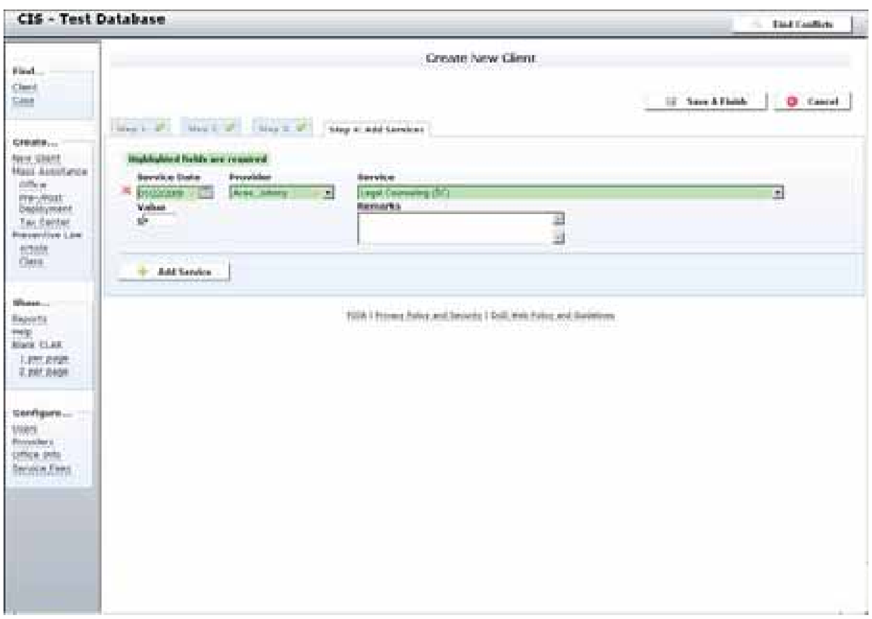


Figure 2.10 Extended Add Services Screen

*(**Note**: All required fields are highlighted in green. Also please note that you may not return to a previously completed tab until after you have entered all of the required information on the current screen. Therefore, ensure that all information you enter is correct before proceeding to the next tab.)*

38. Enter a date in the **Service Date** field (to indicate the date you want the current service added to the client record) or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date *(**Note:** The current date is pre-populated in the **Service Date** field; however, you can enter any date desired.).*

39. Click the **Provider** drop-down menu and select the desired provider ***(Note:*** *The provider already associated with this case, from Step 2, is pre-populated in the **Provider** drop-down menu; however, you can choose any provider desired.).*

40. Click the **Service** drop-down menu and select the desired service type *(**Note:** The service type **SC** is auto-populated in all cases.).*

41. Enter the corresponding value of the service provided in the **Value** field *(**Note:** The predetermined value of the service already associated with this case is pre-populated in the **Service** drop-down menu; however, you can enter any value desired.).*

42. Enter any desired remarks about the service in the **Remarks** scrollbox.

*(**Note:** Click* Add Service *should you need to add additional services for the current case.)*

43. Click Save & Finish to add the current new client information.

    -or-

    Click Cancel to return to the page you were previously on.

2.2.3 Editing a Client

Whenever you need to update client information already entered in **CIS**, simply perform the following steps from any existing case screen, such as the screen provided below for illustrative purposes:

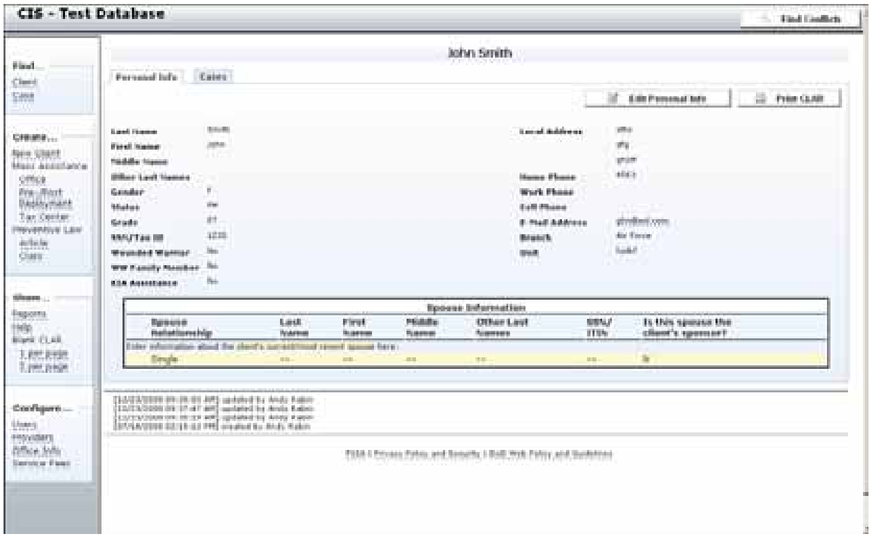


Figure 2.11 Client Screen

*(**Note:** Click* **Print CLAR** *to print the current client information on a standard CLAR form. All information from the current screen is pre-populated in the CLAR.)*

1. Click **Edit Personal Info**.

The Active Client Screen appears:

Figure 2.12 Active Client Screen

*(**Note**: All required fields are highlighted in green.)*

2. Make any needed changes to the current case, ensuring that you review the information under the **Personal Info** tab as well as the **Cases** tab. *(**Note:** You can add a case or edit a*

*case from the Cases tab of any case already entered in **CIS**. To add a case, see Section 2.3.2, Adding a Case, below. To edit a case, see Section 2.3.3, Editing a Case, below.)*

3. Click 

to save your updates and return to the non-active version of the current Client Screen.

-or-

Click 

to return to the non-active version of the current Client Screen.

2.3 Cases

You can assign multiple cases to a given client in **CIS**. **CIS** lets you search for existing cases and create case information. These features are described in the sections that follow.

2.3.1 Searching for a Case

To determine if a case already exists for a given client, perform the following steps from the **Find…** Menu, which is visible from any screen within **CIS**:

1. Click **Find Case**.

The Find Cases Screen appears:

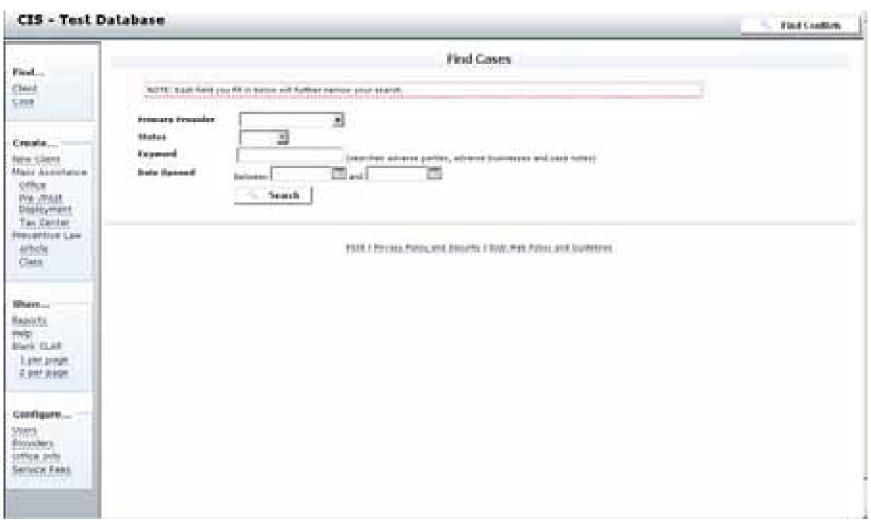


Figure 2.13 Find Cases Screen

2. Click the **Primary Provider** drop-down menu and select the desired provider name.

3. Click the **Status** drop-down menu and select the desired status of **Pending** or **Closed**.

4. Enter a keyword of your choice to search for adverse parties, adverse businesses, or case notes.

5. Enter a date in the **Between** field (to indicate a start date from which to start the search) or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

6. Enter a date in the **and** field (to indicate an end date from which to end the search) or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

7. Click Search.

The Case List Screen appears:

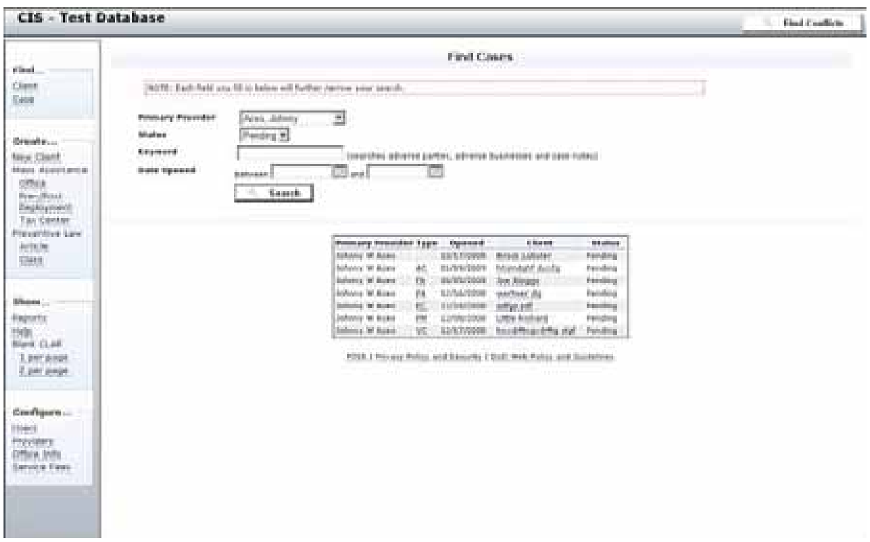


Figure 2.14 Case List Screen

8. Click the desired two-letter **Type** code in the second column from the left to view a given case.

For illustrative purposes, an example Case Screen is displayed:

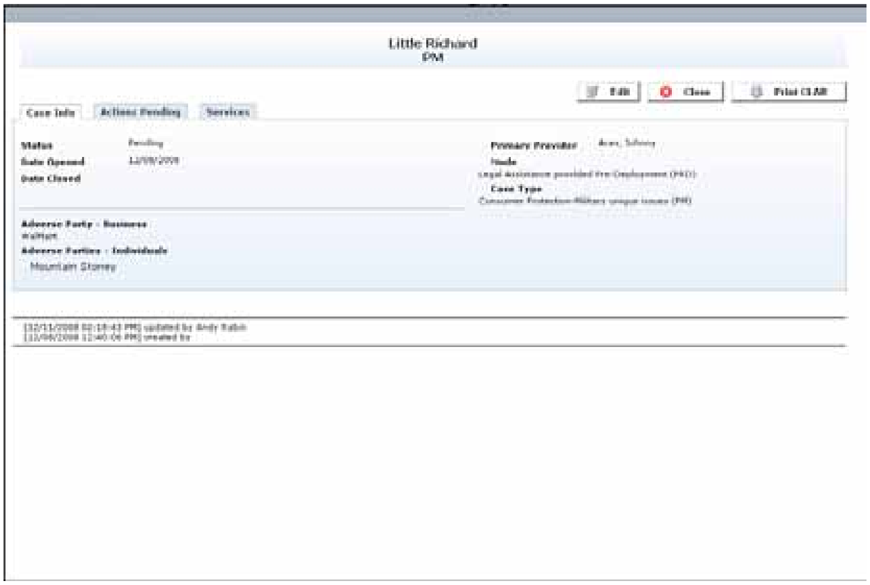


Figure 2.15 Case Screen

From the current case screen, you can edit case information or print a CLAR for the current case. To edit a case, see Section, 2.3.3, Editing a Case, below. To print a CLAR, see Section 4.2, Printing a CLAR, below.

2.3.2 Adding a Case

If this is the first time your office has provided legal assistance to a particular client, ensure that this client's information has been entered in **CIS** under **New Client** before attempting to add their case information. In addition, ensure that you annotate each client's visit to the Legal Assistance office, even when then client returns for additional assistance on an open case such as to discuss a separation agreement or to execute a will.

After you determine that a given case does not already exist in **CIS** and you have added a given client's information, you then need to create a case entry associated with the given client.

To add a new case in **CIS**, perform the following steps from the **Case** tab from any active Client Screen. For illustrative purposes, an example **Cases** tab is displayed:

Figure 2.16 Add Case Screen

To continue adding a new case, perform the following steps from the Add Case Screen:

1. Click 

The Create New Case Screen appears:

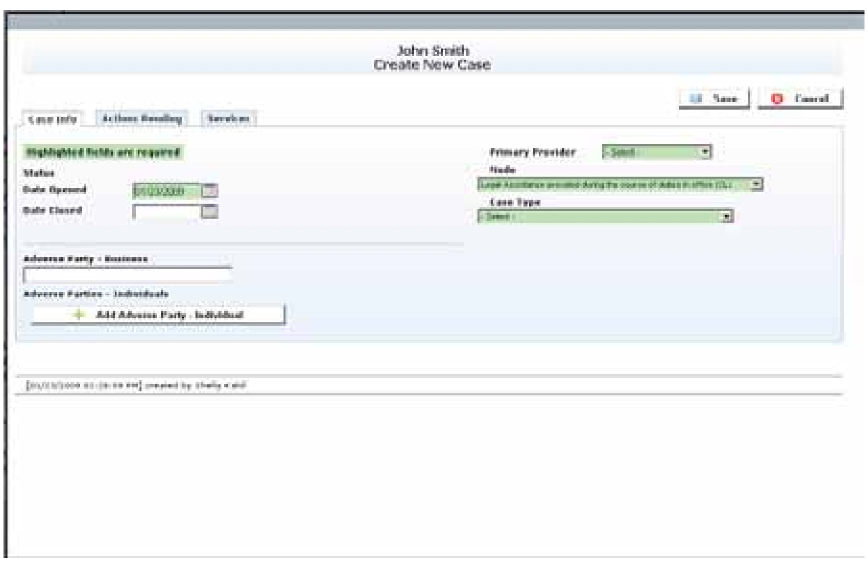


Figure 2.17 Create New Case Screen

2. Enter a date in the **Date Opened** field (to indicate the case start date) or click  to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

3. Enter a date in the **Date Closed** field (to indicate the case end date) or click  to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

4. Click the **Primary Provider** drop-down menu and select the desired provider by name *(**Note:** You can add a provider name by selecting **++Add New Provider++** from the current drop-down menu. Simply enter all required fields in green and click* 

to add the new provider to the current drop-down menu.).

5. Click the **Mode** drop-down menu and select the method used to provide the current legal services.

6. Click the **Case Type** drop-down menu and select the desired case type.

7. Enter the name of any adverse party that is a business entity in the **Adverse Party – Business** field.

8. Enter the name(s) of any adverse party that is an individual in the **Adverse Parties – Individuals** field by clicking 

. *(**Note:** To remove an entry at a later time, simply click* *.)*

9. Click the **Actions Pending** tab.

The Actions Pending Screen appears:

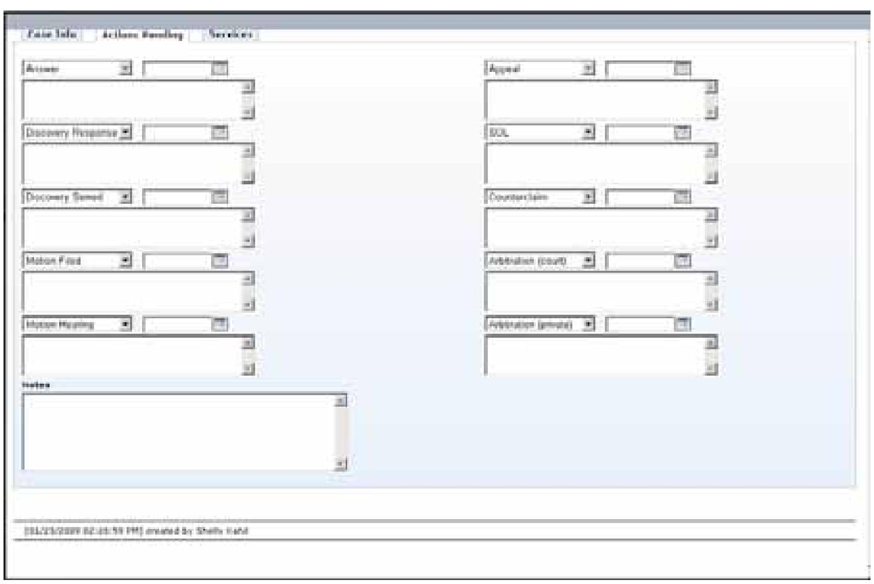


Figure 2.18 Actions Pending Screen

*(**Note**: None of the fields on the Add Actions Pending Screen are required. Also please note that you may not return to a previously completed tab until after you have entered all of the current*

client information. Therefore, ensure that all information you enter is correct before proceeding to the next tab.)

The **Add Actions Pending** tab gives you several areas where you can note any pending actions about the current case. With each of these areas, you can note the date the pending action began as well as include notes in an accompanying scrollbox. The bottom of the screen contains a scrollbox where you can add general case notes.

10. Click the **Add Services** tab.

The Add Services Screen appears:

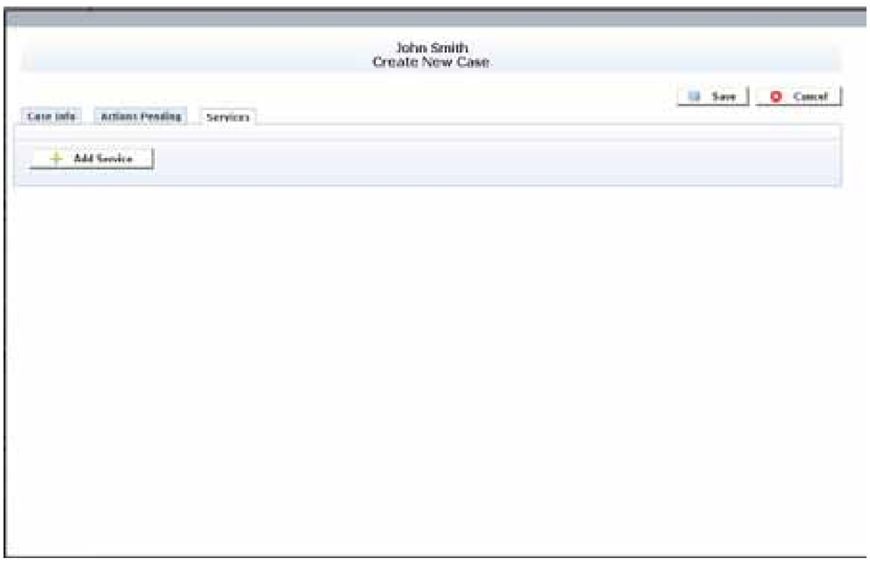


Figure 2.19 Services Screen

*(**Note**: All required fields are highlighted in green. Also please note that you may not return to a previously completed tab until after you have entered all of the required information on the current screen. Therefore, ensure that all information you enter is correct before proceeding to the next tab.)*

11. Click 

The Extended Services Screen appears:

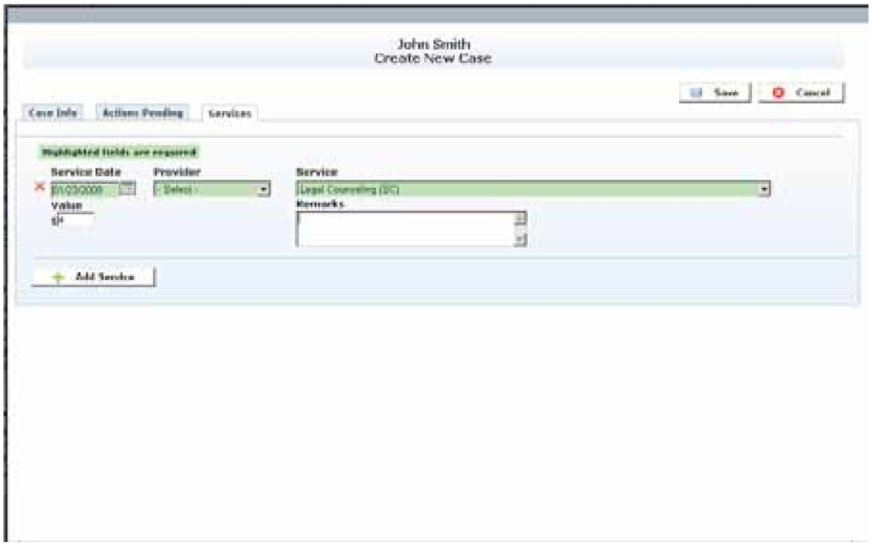


Figure 2.20 Extended Services Screen

12. Enter a date in the **Service Date** field (to indicate the date you want the current service added to the client record) or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date *(**Note:** The current date is pre-populated in the **Service Date** field; however, you can enter any date desired.).*

13. Click the **Provider** drop-down menu and select the desired provider ***(Note:** The provider already associated with this case is pre-populated in the **Provider** drop-down menu; however, you can enter any provider desired.).*

14. Click the **Service** drop-down menu and select the desired service type *(**Note:** The service type already associated with this case is pre-populated in the **Service** drop-down menu; however, you can enter any service type desired.).*

15. Enter the corresponding value of the service provided in the **Value** field *(**Note:** The predetermined value of the service already associated with this case is pre-populated in the **Service** drop-down menu; however, you can enter any value desired if you change the provider or the service type.).*

16. Enter any desired remarks about the service in the **Remarks** scrollbox.

*(**Note:** Click* **Add Service** *should you need to add additional services for the current client.)*

17. Click **Save & Finish** to add the current new client information.

-or-

Click 

to return to the page you were previously on.

2.3.3 Editing a Case

Whenever you need to update a case already entered in **CIS**, simply perform the following steps from the example Case Screen, which is provided below for illustrative purposes:

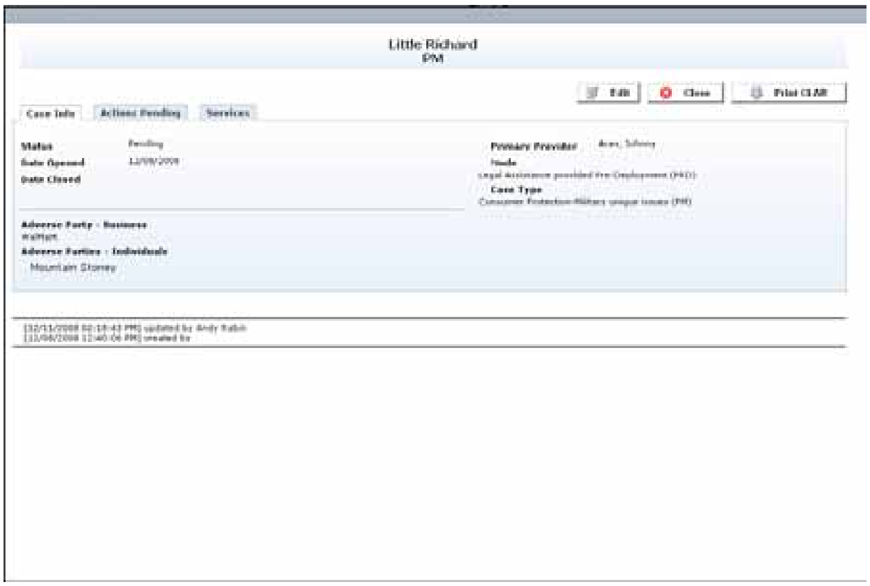


Figure 2.21 Case Screen

*(**Note:** Click* 

to print the current case information on a standard CLAR form. All information from the current screen is pre-populated in the CLAR.)

1. Click 

.

The Active Case Screen appears:

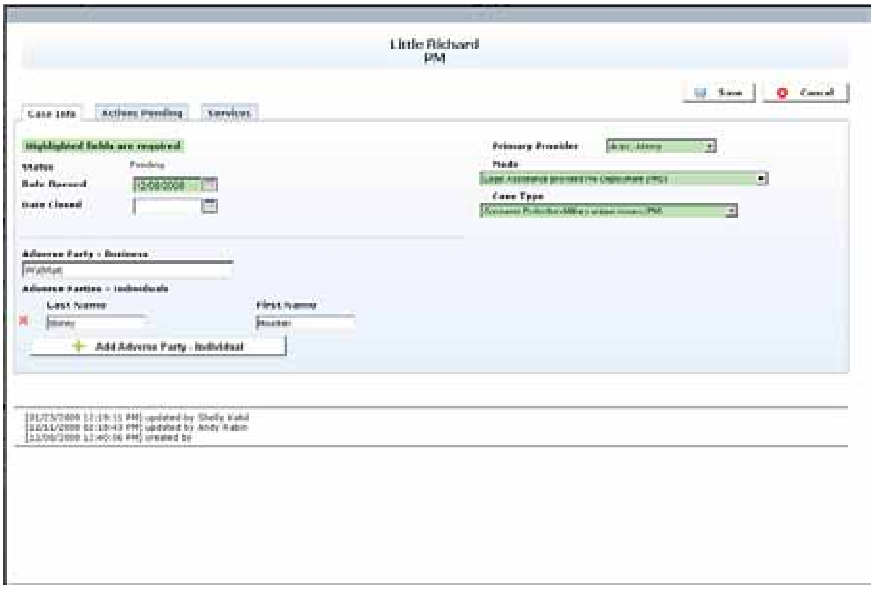


Figure 2.22 Active Case Screen

*(**Note**: All required fields are highlighted in green.)*

2. Make any needed changes to the current case, ensuring that you review the information under the **Actions Pending** tab as well as the **Services** tab.

3. Click  to save your updates and return to the non-active version of the current Case Screen.

   -or-

   Click  to return to the non-active version of the current Case Screen.

2.4 Mass Assistance

The **In-Office Mass Assistance** feature lets you record services provided such as affidavits, legal counseling, and notarizations. The **Pre-/Post-Deployment** feature lets you record services such as legal counseling, wills with trusts, and notarizations provided to those service members who are about to be deployed or who have recently returned from a deployment. Last, the **Tax Center** feature lets you record services provided during tax season such as the number of federal, state, and local returns that your location has prepared or e-filed.

2.4.1 Creating In-Office Mass Assistance

To create In-Office Mass Assistance, perform the following steps from the **CIS Create…** Menu, which is visible from any screen within **CIS**:

1. Click **Office**.

The In-Office Mass Assistance Screen appears:

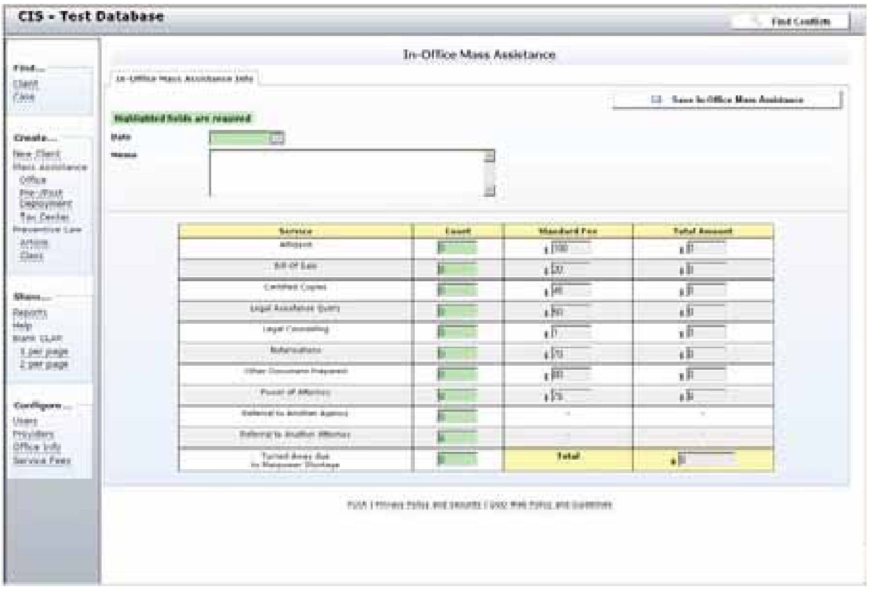


Figure 2.23 In-Office Mass Assistance Screen

*(**Note**: All required fields are highlighted in green.)*

2. Enter a date in the **Date** field (for the day you want services counted and their extended amounts to be valid) or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

3. Enter any desired notes in the **Memo** scrollbox.

4. Enter the count of each service provided as of the date noted *(**Note:** Notice how the extended amount, as well as the total amount, change as each service count is entered.).*

5. Click 

.

The Completed In-Office Mass Assistance Screen appears:

Figure 2.24 Completed In-Office Mass Assistance Screen

*(**Note:** Notice how an audit trail is provided mid-screen to assist you in determining who last created or updated the current screen. To edit this screen, simply click* 

, make any needed changes, and save the screen again.)

2.4.2 Creating Pre-/Post Deployment Mass Assistance

To create Pre-/Post- Deployment Mass Assistance, perform the following steps from the **CIS Create…** Menu, which is visible from any screen within **CIS**:

1. Click **Pre-/Post-Deployment**.

The Pre-/Post-Deployment Mass Assistance Screen appears:

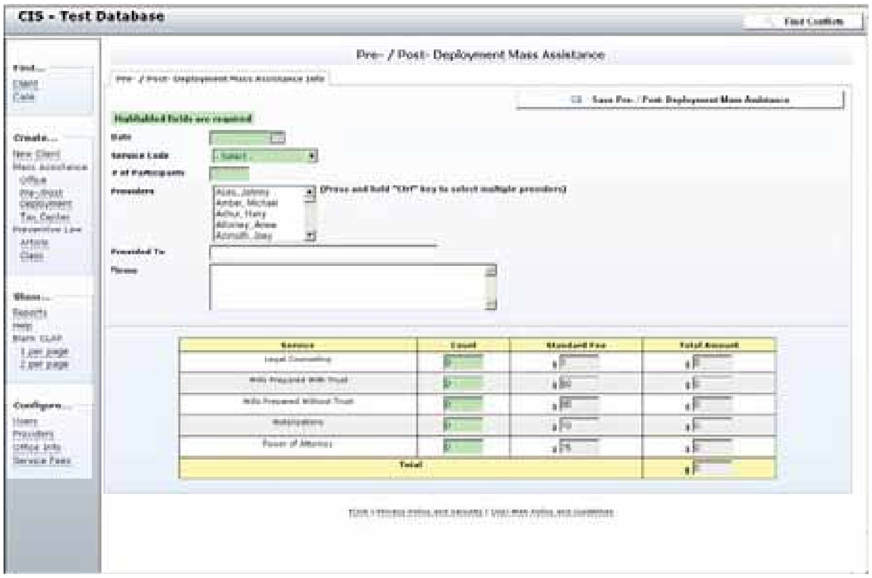


Figure 2.25 Pre-/Post-Deployment Mass Assistance Screen

*(**Note**: All required fields are highlighted in green.)*

2. Enter a date in the **Date** field (for which you want the pre- and post-deployments counts, as well as their extended amounts, to be valid) or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

3. Click the **Service Code** drop-down menu and select if you prepared the service pre- or post-deployment.

4. Enter the number of participants in the **# of Participants** field.

5. Select the desired providers from the Providers scrollbox *(**Note:** Press and hold the **Ctrl** key to select multiple providers.).*

6. Enter any desired notes in the **Memo** scrollbox.

7. Enter the count of each service provided as of the date noted *(**Note:** Notice how the extended amount, as well as the total amount, change as each service count is entered.).*

8. Click Save Pre- / Post- Deployment Mass Assistance.

The Completed Pre-/Post-Deployment Mass Assistance Screen appears:

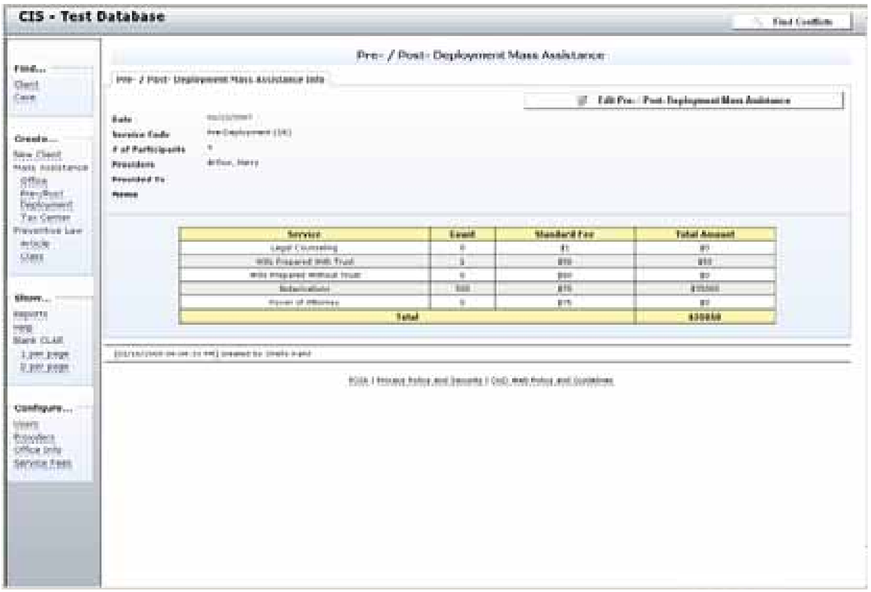


Figure 2.26 Completed Pre-/Post-Deployment Mass Assistance Screen

*(**Note:** Notice how an audit trail is provided mid-screen to assist you in determining who last created or updated the current screen. To edit this screen, simply click* 

, make any needed changes, and save the screen again.)

2.4.3 Creating Tax Center Mass Assistance

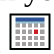
To create Tax Center Mass Assistance, perform the following steps from the **CIS Create…** Menu, which is visible from any screen within **CIS**:

1. Click **Tax Center**.

The Mass Assistance – Tax Center Screen appears:

Figure 2.27 Mass Assistance – Tax Center Screen

*(**Note**: All required fields are highlighted in green.)*

2. Enter a date in the **Date** field (for which you want tax center counts, as well as their extended amounts, to be valid) or click  to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

3. Enter the name of the person or the organization for which the service was provided in the **Provided To** field.

4. Enter the dollar amount of the tax preparation and electronic fees saved in the **Tax Preparation and Electronic Fees Saved** field.

5. Enter the dollar amount of the tax refund in the **Tax Refunds** field.

6. Enter any desired notes in the **Memo** scrollbox.

7. Enter the count of each service type provided as of the date noted *(**Note:** Notice how the extended amount, as well as the total amount, change as each service count is entered.).*

8. Enter the number of clients turned away in the **Client Turned Away** field.

9. Click 

.

The Completed Mass Assistance – Tax Center Screen appears:

Figure 2.28 Completed Mass Assistance – Tax Center Screen

*(**Note:** Notice how an audit trail is provided mid-screen to assist you in determining who last created or updated the current screen. To edit this screen, simply click* 

, make any needed changes, and save the screen again.)

2.5 Preventive Law

Preventive Law is an important primary mission of Legal Assistance. Legal Assistance providers deliver preventive law services, such as briefings, classes, Internet homepages, and articles. **CIS' Preventive Law** feature lets you record law preventive services.

Much of the data entered in the **Preventive Law** feature serves as an in-house management tool. The **Articles** and **Classes** categories have a **Practice Category** drop-down menu that corresponds to the Legal Assistance areas such as Family Law and Estate Planning. This feature assists you in categorizing preventive law services, as well as identifying trends and seasonal scheduling.

2.5.1 Creating an Article

To create an article entry, perform the following steps from the **CIS Create…** Menu, which is visible from any screen within **CIS**:

1. Click **Article**.

The Article Screen appears:

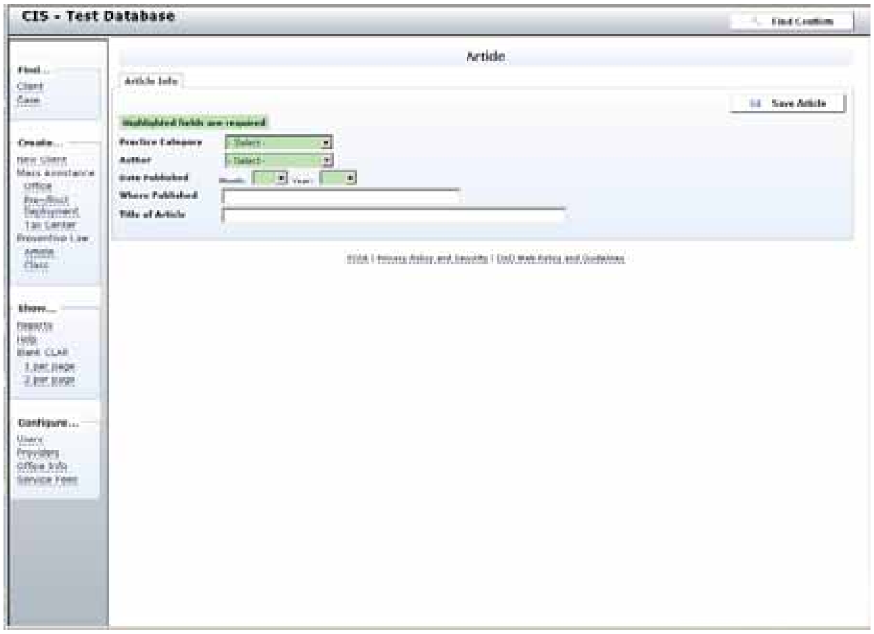


Figure 2.29 Article Screen

*(**Note**: All required fields are highlighted in green.)*

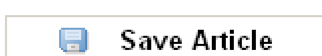
2. Click the **Practice Category** drop-down menu and select the desired legal practice category.

3. Click the **Author** drop-down menu and select the desired author by name.

4. Click the **Month:** drop-down menu and select the month you published the article.

5. Click the **Year:** drop-down menu and select the year you published the article.

6. Enter the location where you published the article in **Title of Article** field.

7. Click 

.

The Completed Article Screen appears:

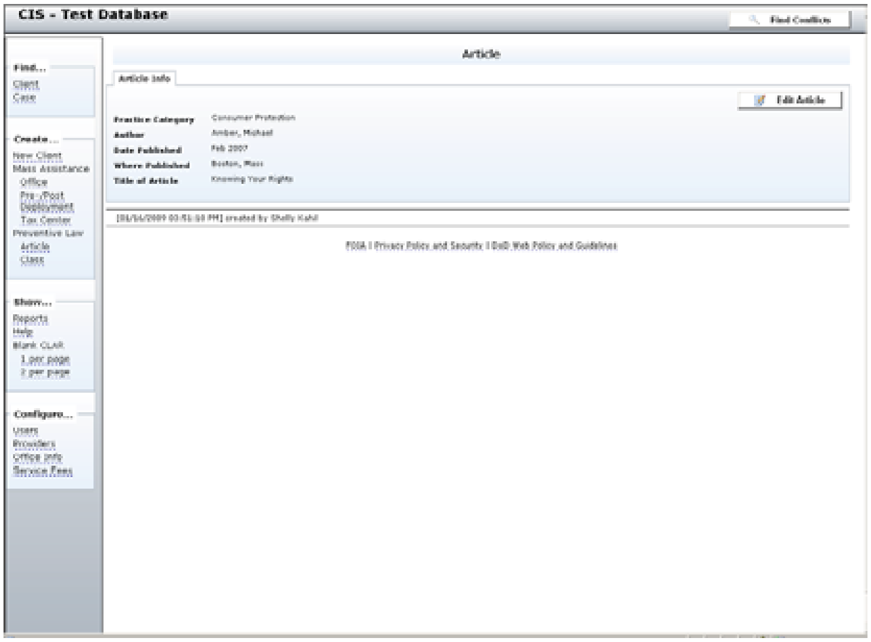
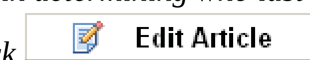


Figure 2.30 Completed Article Screen

*(**Note:** Notice how an audit trail is provided mid-screen to assist you in determining who last created or updated the current screen. To edit this screen, simply click* 

, make any needed changes, and save the screen again.)

2.5.2 Creating a Class

To create a class entry, perform the following steps from the **CIS Create…** Menu, which is visible from any screen within **CIS**:

1. Click **Class**.

The Class Screen appears:

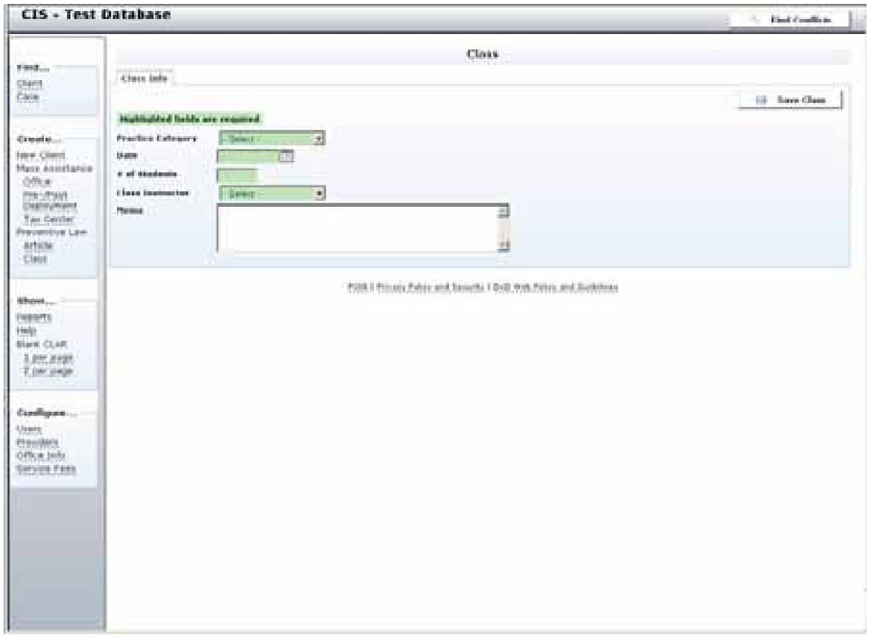


Figure 2.31 Class Screen

2. Click the **Practice Category** drop-down menu and select the desired legal practice category.

3. Enter a date in the **Date** field (when the class was held) or click  to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

4. Enter the number of students who took the class.

5. Click the **Class Instructor** drop-down menu and select the desired name of the instructor.

6. Enter any desired notes in the **Memo** scrollbox.

7. Click 

.

The Completed Class Screen appears:

Figure 2.32 Completed Class Screen

*(**Note:** Notice how an audit trail is provided mid-screen to assist you in determining who last created or updated the current screen. To edit this screen, simply click* 

, make any needed changes, and save the screen again.)

3 Reports

CIS lets you run predefined reports based on the following categories:

- Mass Assistance In-Office Report
- Mass Assistance Pre/Post-Deployment Report
- Tax Center Report
- Classes Report
- Articles Report
- Cases Report
- Services Summary Report

Detailed information regarding each of these report types is described in the sections that follow.

3.1 Running a Mass Assistance In-Office Report

A **Mass Assistance In-Office** report lists all in-office services for a particular office provided by date range and includes information regarding the number of times an office performed that service, the standard fee for that service, as well as the extended dollar amount of that fee, based on the number of times the office performed that service. In addition, the report lists how many times the office referred a client to another agency or attorney, as well as how many clients were turned away from that officer due to a manpower shortage.

To run a **Mass Assistance In-Office** report, perform the following steps from the **CIS** menu portion of your current screen:

1. Click **Reports**.

The Create a Report Screen appears:

Figure 3.1 Create a Report Screen

2. Click the **Select a report:** drop-down menu.

3. Select **Mass Assistance – In-Office**.

4. Enter a date in the first **Select a date range:** field or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

5. Enter a date in the second **Select a date range:** field or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

6. Click Create Report.

An in-screen report appears.

7. Click Print Report.

A new, printer-friendly version of the report appears, as does the Print Screen.

8. Click **Print Report** from the Print Screen to print the current report.

The Office Report Screen appears:

Figure 3.2 Office Report Screen

3.2 Running a Mass Assistance Pre-/Post-Deployment Report

A **Mass Assistance Pre-/Post-Deployment** report lists all office services by individual provider or by all providers for a given date range, to include the option of a current year-to-date report, a previous calendar year report, a fiscal year report, or a current month-to-date report. This report breaks down the services provided on a pre-deployment and a post-deployment basis, including the number of types of services, the standard fee charged for those services, as well as the extended dollar value of each service type. This report also provides a combined total of both deployment types using the same values as previously described.

To run a **Mass Assistance Pre-/Post-Deployment** report, perform the following steps from the **CIS** menu portion of your current screen:

1. Click **Reports**.

The Create a Report Screen appears:

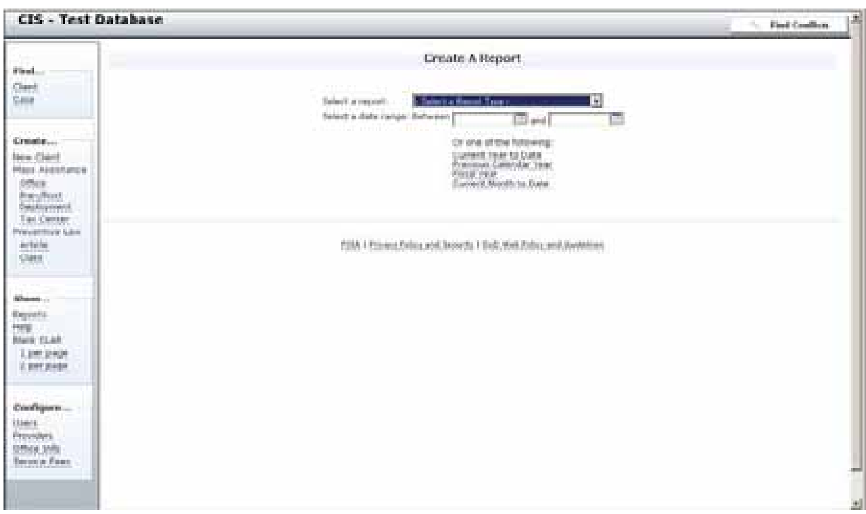


Figure 3.3 Create a Report Screen

2. Click the **Select a report:** drop-down menu.
3. Select **Mass Assistance – In-Pre-/Post-Deployment**.

An Extended Create a Report Screen appears:

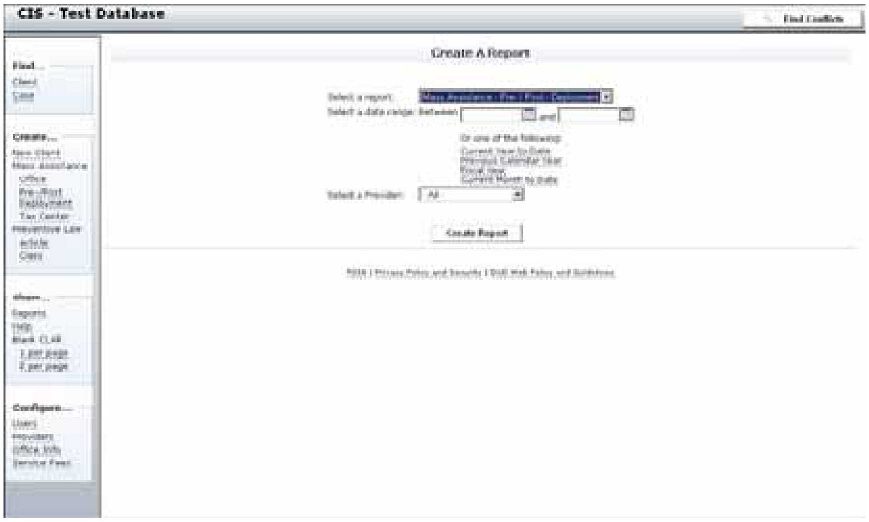


Figure 3.4 Extended Create a Report Screen

4. Enter a date in the first **Select a date range:** field or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

5. Enter a date in the second **Select a date range:** field or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

6. Click the **Select a report:** drop-down menu.

7. Select **All** or select an individual provider.

8. Click 

.

An in-screen report appears.

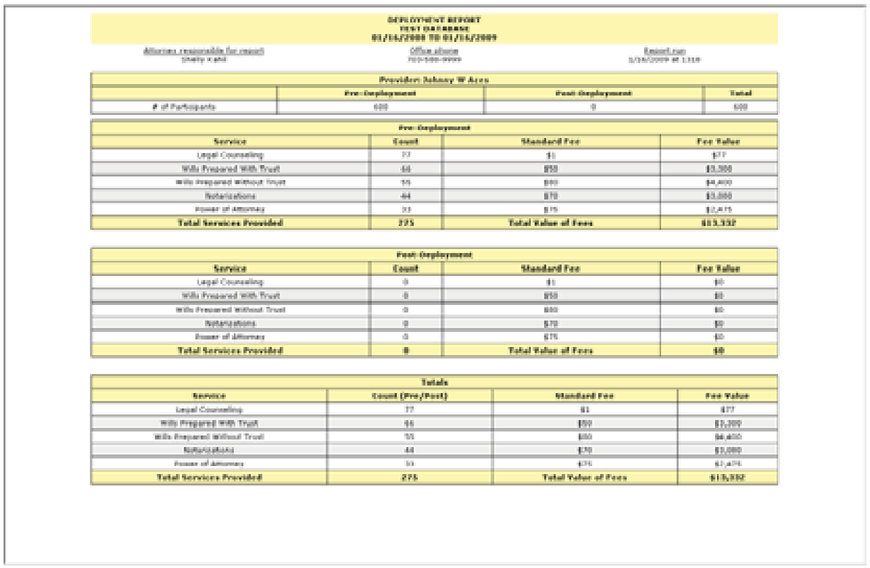
9. Click 

.

A new, printer-friendly version of the report appears, as does the Print Screen.

10. Click **Print Report** from the Print Screen to print the current report.

The Deployment Report Screen appears:



DEPLOYMENT REPORT
TEST DATABASE
01/16/2008 TO 01/16/2009

Attorney responsible for report	Office phone	Report run
[illegible]	[illegible]	[illegible]

Provider: Johnny W [illegible]			
	Pre-Deployment	Post-Deployment	Total
# of Participants	600	0	600

Pre-Deployment			
Service	Count	Standard Fee	Fee Value
Legal Counseling	77	$1	$77
Wills Prepared With Trust	66	$50	$3,300
Wills Prepared Without Trust	55	$80	$4,400
Notarizations	44	$70	$3,080
Power of Attorney	33	$75	$2,475
Total Services Provided	275	Total Value of Fees	$13,332

Post-Deployment			
Service	Count	Standard Fee	Fee Value
Legal Counseling	0	$1	$0
Wills Prepared With Trust	0	$50	$0
Wills Prepared Without Trust	0	$80	$0
Notarizations	0	$70	$0
Power of Attorney	0	$75	$0
Total Services Provided	0	Total Value of Fees	$0

Totals			
Service	Count (Pre/Post)	Standard Fee	Fee Value
Legal Counseling	77	$1	$77
Wills Prepared With Trust	66	$50	$3,300
Wills Prepared Without Trust	55	$80	$4,400
Notarizations	44	$70	$3,080
Power of Attorney	33	$75	$2,475
Total Services Provided	275	Total Value of Fees	$13,332

Figure 3.5 Deployment Report Screen

3.3 Running a Tax Center Report

A **Mass Assistance Tax Center** report lists all office tax services provided to services members, family members, retires, civilians, or others, by a particular office in a given date range. This report breaks down tax services by federal, state, or local returns. The report further delineates the breakdown by the number of returns prepared and the number of returns e-filed. This report also lists the dollar amount of the tax preparation and electronic fees saved, the dollar amount of tax refunds, and the number of clients the office had to turn away.

To run a **Mass Assistance Tax Center** report, perform the following steps from the **CIS** menu portion of your current screen:

1. Click **Reports**.

The Create a Report Screen appears:

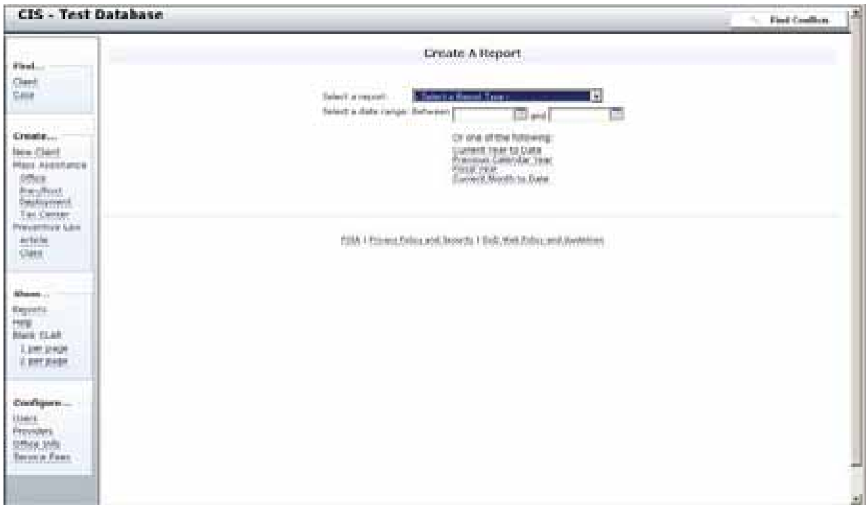


Figure 3.6 Create a Report Screen

2. Click the **Select a report:** drop-down menu.

3. Select **Tax Center**.

4. Enter a date in the first **Select a date range:** field or click  to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

5. Enter a date in the second **Select a date range:** field or click  to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

6. Click Create Report.

An in-screen report appears.

7. Click Print Report.

A new, printer-friendly version of the report appears, as does the Print Screen.

8. Click **Print Report** from the Print Screen to print the current report.

The Tax Report Screen appears:

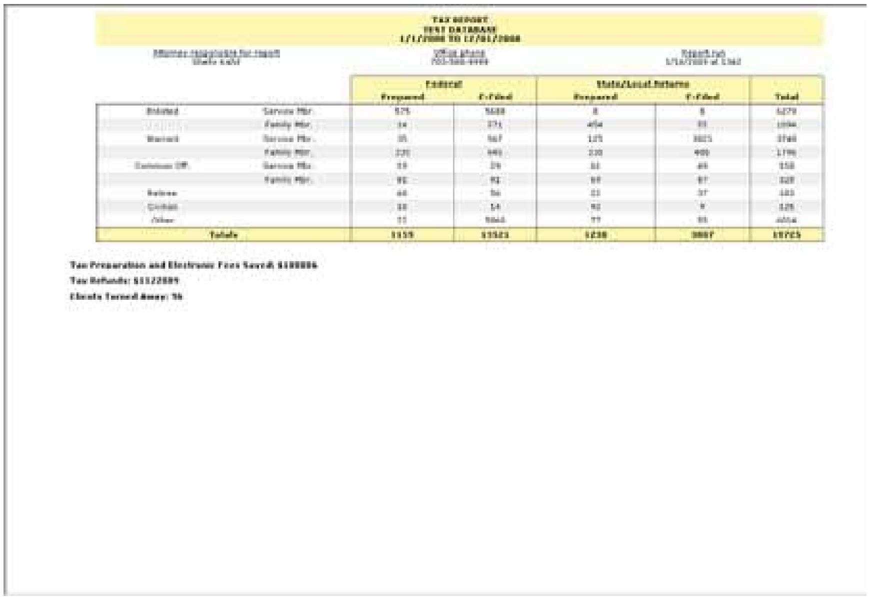


Figure 3.7 Tax Report Screen

3.4 Running a Class Report

A **Class** report lists the practice categories, the number of classes, as well as the number of students, by instructor name, for a given date range. You can also choose to get a listing of all classes, for all instructors, by date range.

To run a **Class** report, perform the following steps from the **CIS** menu portion of your current screen:

1. Click **Reports**.

The Create a Report Screen appears:

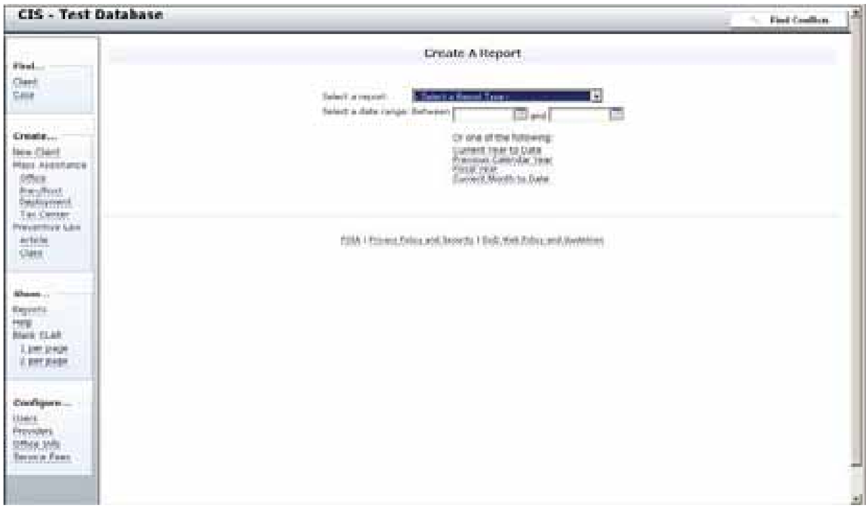


Figure 3.8 Create a Report Screen

2. Click the **Select a report:** drop-down menu.

3. Select **Classes**.

An Extended Create a Report Screen appears:

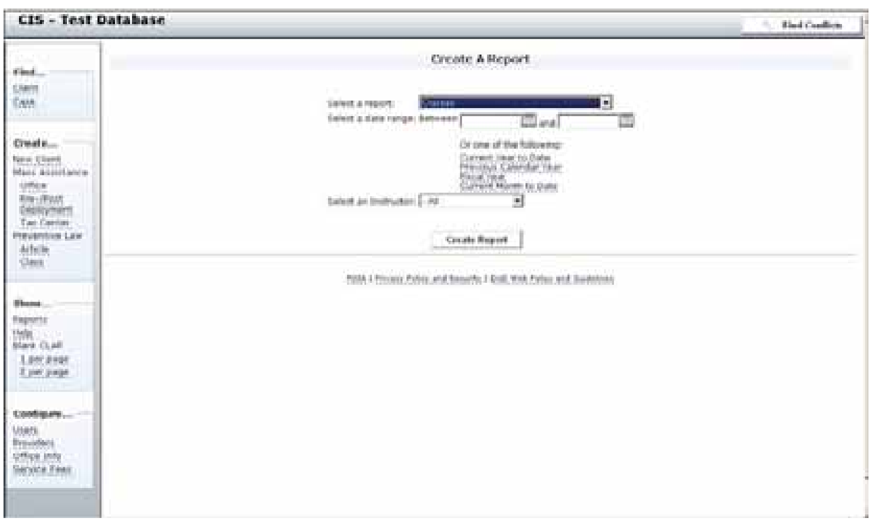


Figure 3.9 Extended Create a Report Screen

4. Enter a date in the first **Select a date range:** field or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

5. Enter a date in the second **Select a date range:** field or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

6. Click the **Select an Instructor:** drop-down menu.

7. Select an individual instructor or select **All**.

8. Click 

.

An in-screen report appears.

9. Click 

.

A new, printer-friendly version of the report appears, as does the Print Screen.

10. Click **Print Report** from the Print Screen to print the current report.

The Class Report Screen appears:

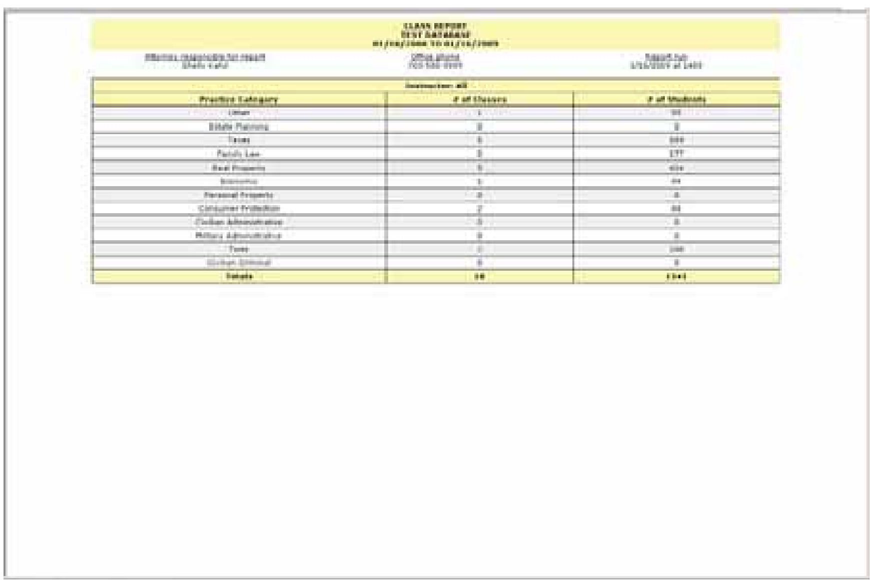


Figure 3.10 Class Report Screen

3.5 Running an Article Report

An **Article** report lists the number of articles prepared by practice category

To run an **Articles** report, perform the following steps from the **CIS** menu portion of your current screen:

1. Click **Reports**.

The Create a Report Screen appears:

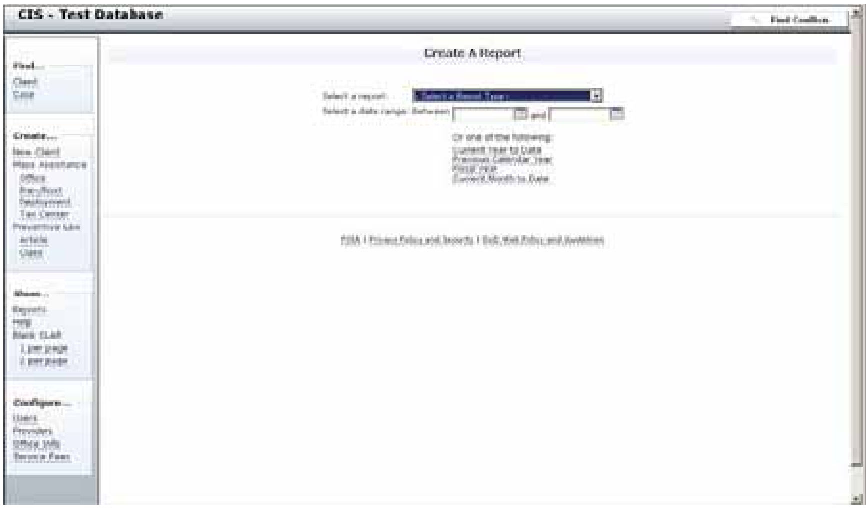


Figure 3.11 Create a Report Screen

2. Click the **Select a report:** drop-down menu.

3. Select **Articles**.

An Extended Create a Report Screen appears:

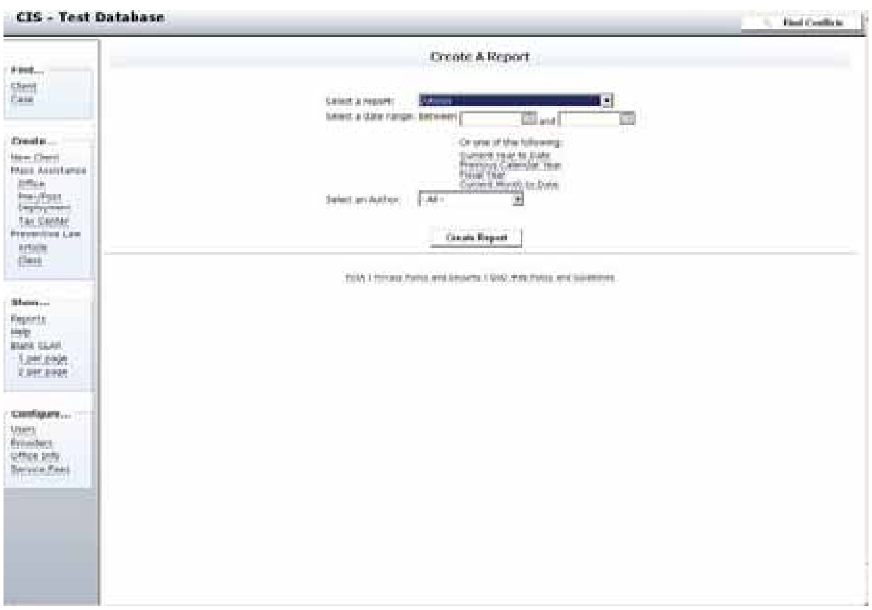


Figure 3.12 Extended Create a Report Screen

4. Enter a date in the first **Select a date range:** field or click  to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

5. Enter a date in the second **Select a date range:** field or click to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

6. Click the **Select an Instructor:** drop-down menu.

7. Select an individual author or select **All**.

8. Click 

.

An in-screen report appears.

9. Click 

.

A new, printer-friendly version of the report appears, as does the Print Screen.

10. Click **Print Report** from the Print Screen to print the current report.

The Article Report Screen appears:

Figure 3.13 Article Report Screen

3.6 Running a Cases Report

A **Case** report lists the number of Legal Assistance personnel, the total number of clients, the total number of client visits, and the case types seen. You can create the reports based on provider and/or based on client type, such as Wounded Warrior. A **Case** report tells you how many case types a particular office has seen (and you can narrow your search results by provider, client type, etc.). A **Case** report does not report how many services are created for each case. To see the number of services, you should run a **Services Summary** report.

To run a **Cases** report, perform the following steps from the **CIS** menu portion of your current screen:

1. Click **Reports**.

The Create a Report Screen appears:

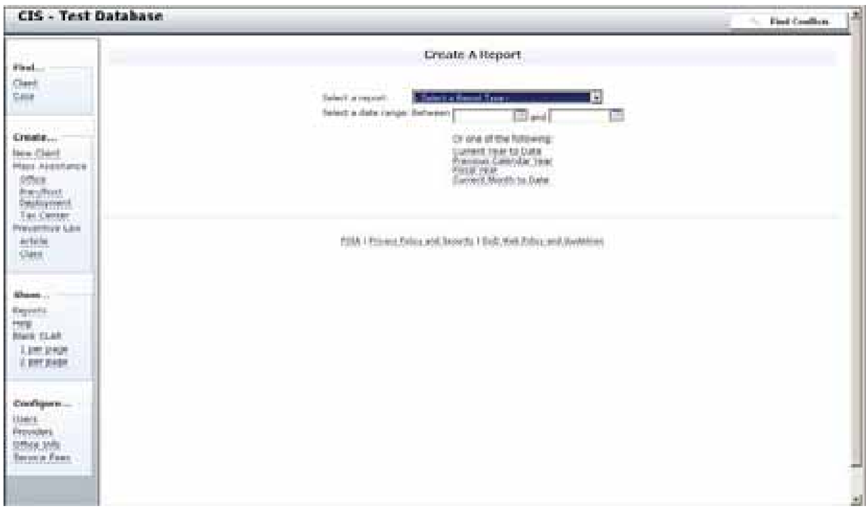


Figure 3.14 Create a Report Screen

2. Click the **Select a report:** drop-down menu.

3. Select **Case**.

An Extended Create a Report Screen appears:

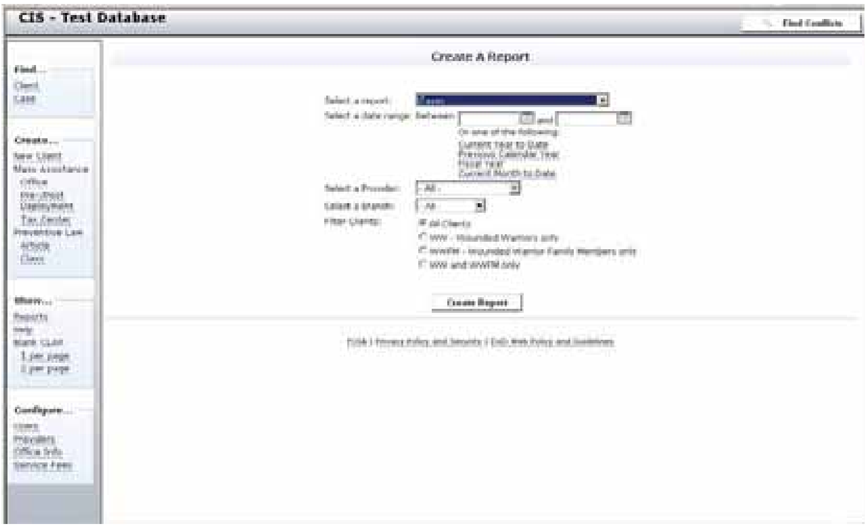


Figure 3.15 Extended Create a Report Screen

4. Enter a date in the first **Select a date range:** field or click  to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

5. Enter a date in the second **Select a date range:** field or click  to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

6. Click the **Select a Provider:** drop-down menu.

7. Select an individual provider or select **All**.

8. Click the **Select a Branch:** drop-down menu.

9. Select an individual branch or select **All**.

10. Select the desired radio button in the **Filter Clients:** field.

11. Click 

.

An in-screen report appears.

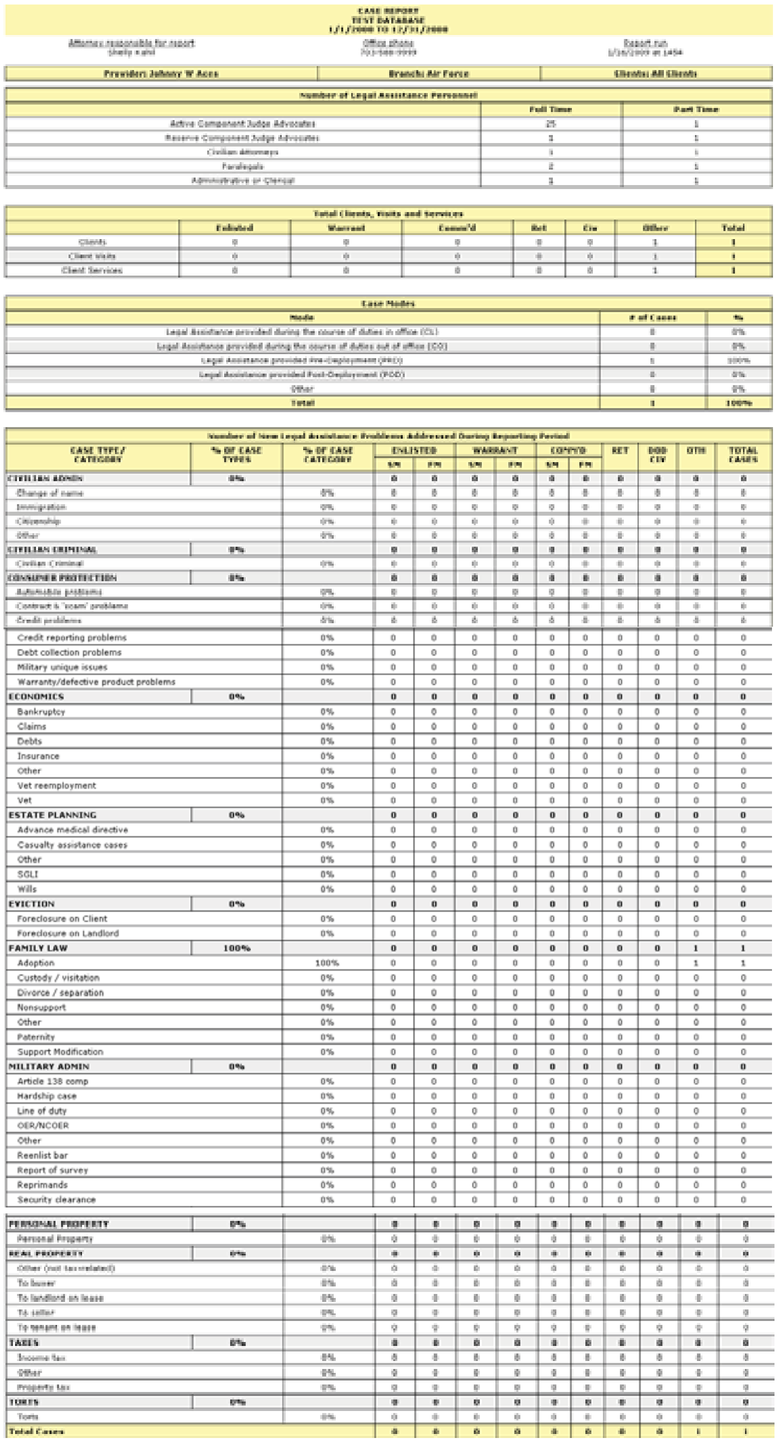
12. Click 

.

A new, printer-friendly version of the report appears, as does the Print Screen.

13. Click **Print Report** from the Print Screen to print the current report.

The Case Report Screen appears:



CASE REPORT
TEST DATABASE
1/1/2008 TO 12/31/2008

Attorney responsible for report: [illegible] | Office phone: [illegible] | Report run: [illegible]

Provider: Johnny W Aces	Branch: Air Force	Clients: All Clients

Number of Legal Assistance Personnel	Full Time	Part Time
Active Component Judge Advocates	25	1
Reserve Component Judge Advocates	1	1
Civilian Attorneys	1	1
Paralegals	2	1
Administrative or Clerical	1	1

Total Clients, Visits and Services	Enlisted	Warrant	Comm'd	Ret	Civ	Other	Total
Clients	0	0	0	0	0	1	1
Client Visits	0	0	0	0	0	1	1
Client Services	0	0	0	0	0	1	1

Case Modes: Mode	# of Cases	%
Legal Assistance provided during the course of duties in office (CI)	0	0%
Legal Assistance provided during the course of duties out of office (CO)	0	0%
Legal Assistance provided Pre-Deployment (PRD)	1	100%
Legal Assistance provided Post-Deployment (POD)	0	0%
Other	0	0%
Total	1	100%

Number of New Legal Assistance Problems Addressed During Reporting Period

CASE TYPE/ CATEGORY	% OF CASE TYPES	% OF CASE CATEGORY	ENLISTED S/M	ENLISTED F/M	WARRANT S/M	WARRANT F/M	COMM'D S/M	COMM'D F/M	RET	DOD CIV	OTH	TOTAL CASES
CIVILIAN ADMIN	0%		0	0	0	0	0	0	0	0	0	0
Change of name		0%	0	0	0	0	0	0	0	0	0	0
Immigration		0%	0	0	0	0	0	0	0	0	0	0
Citizenship		0%	0	0	0	0	0	0	0	0	0	0
Other		0%	0	0	0	0	0	0	0	0	0	0
CIVILIAN CRIMINAL	0%		0	0	0	0	0	0	0	0	0	0
Civilian Criminal		0%	0	0	0	0	0	0	0	0	0	0
CONSUMER PROTECTION	0%		0	0	0	0	0	0	0	0	0	0
Automobile problems		0%	0	0	0	0	0	0	0	0	0	0
Contract & "scam" problems		0%	0	0	0	0	0	0	0	0	0	0
Credit problems		0%	0	0	0	0	0	0	0	0	0	0
Credit reporting problems		0%	0	0	0	0	0	0	0	0	0	0
Debt collection problems		0%	0	0	0	0	0	0	0	0	0	0
Military unique issues		0%	0	0	0	0	0	0	0	0	0	0
Warranty/defective product problems		0%	0	0	0	0	0	0	0	0	0	0
ECONOMICS	0%		0	0	0	0	0	0	0	0	0	0
Bankruptcy		0%	0	0	0	0	0	0	0	0	0	0
Claims		0%	0	0	0	0	0	0	0	0	0	0
Debts		0%	0	0	0	0	0	0	0	0	0	0
Insurance		0%	0	0	0	0	0	0	0	0	0	0
Other		0%	0	0	0	0	0	0	0	0	0	0
Vet reemployment		0%	0	0	0	0	0	0	0	0	0	0
Vet		0%	0	0	0	0	0	0	0	0	0	0
ESTATE PLANNING	0%		0	0	0	0	0	0	0	0	0	0
Advance medical directive		0%	0	0	0	0	0	0	0	0	0	0
Casualty assistance cases		0%	0	0	0	0	0	0	0	0	0	0
Other		0%	0	0	0	0	0	0	0	0	0	0
SGLI		0%	0	0	0	0	0	0	0	0	0	0
Wills		0%	0	0	0	0	0	0	0	0	0	0
EVICTION	0%		0	0	0	0	0	0	0	0	0	0
Foreclosure on Client		0%	0	0	0	0	0	0	0	0	0	0
Foreclosure on Landlord		0%	0	0	0	0	0	0	0	0	0	0
FAMILY LAW	100%		0	0	0	0	0	0	0	0	1	1
Adoption		100%	0	0	0	0	0	0	0	0	1	1
Custody / visitation		0%	0	0	0	0	0	0	0	0	0	0
Divorce / separation		0%	0	0	0	0	0	0	0	0	0	0
Nonsupport		0%	0	0	0	0	0	0	0	0	0	0
Other		0%	0	0	0	0	0	0	0	0	0	0
Paternity		0%	0	0	0	0	0	0	0	0	0	0
Support Modification		0%	0	0	0	0	0	0	0	0	0	0
MILITARY ADMIN	0%		0	0	0	0	0	0	0	0	0	0
Article 138 comp		0%	0	0	0	0	0	0	0	0	0	0
Hardship case		0%	0	0	0	0	0	0	0	0	0	0
Line of duty		0%	0	0	0	0	0	0	0	0	0	0
OER/NCOER		0%	0	0	0	0	0	0	0	0	0	0
Other		0%	0	0	0	0	0	0	0	0	0	0
Reenlist bar		0%	0	0	0	0	0	0	0	0	0	0
Report of survey		0%	0	0	0	0	0	0	0	0	0	0
Reprimands		0%	0	0	0	0	0	0	0	0	0	0
Security clearance		0%	0	0	0	0	0	0	0	0	0	0
PERSONAL PROPERTY	0%		0	0	0	0	0	0	0	0	0	0
Personal Property		0%	0	0	0	0	0	0	0	0	0	0
REAL PROPERTY	0%		0	0	0	0	0	0	0	0	0	0
Other (not tax-related)		0%	0	0	0	0	0	0	0	0	0	0
To buyer		0%	0	0	0	0	0	0	0	0	0	0
To landlord on lease		0%	0	0	0	0	0	0	0	0	0	0
To seller		0%	0	0	0	0	0	0	0	0	0	0
To tenant on lease		0%	0	0	0	0	0	0	0	0	0	0
TAXES	0%		0	0	0	0	0	0	0	0	0	0
Income tax		0%	0	0	0	0	0	0	0	0	0	0
Other		0%	0	0	0	0	0	0	0	0	0	0
Property tax		0%	0	0	0	0	0	0	0	0	0	0
TORTS	0%		0	0	0	0	0	0	0	0	0	0
Torts		0%	0	0	0	0	0	0	0	0	0	0
Total Cases			0	0	0	0	0	0	0	0	1	1

Figure 3.16 Case Report Screen

3.7 Running a Services Summary Report

A **Services Summary** report lists the number of Legal Assistance personnel, the total number of client, the total number of client visits, and services provided. A **Services Summary** report tells you how many of each service has been provided. For example, this report type will indicate how many will services were prepared.

To run a **Services Summary** report, perform the following steps from the **CIS** menu portion of your current screen:

1. Click **Reports**.

The Create a Report Screen appears:

Figure 3.17 Create a Report Screen

2. Click the **Select a report:** drop-down menu.

3. Select **Services Summary**.

An Extended Create a Report Screen appears:

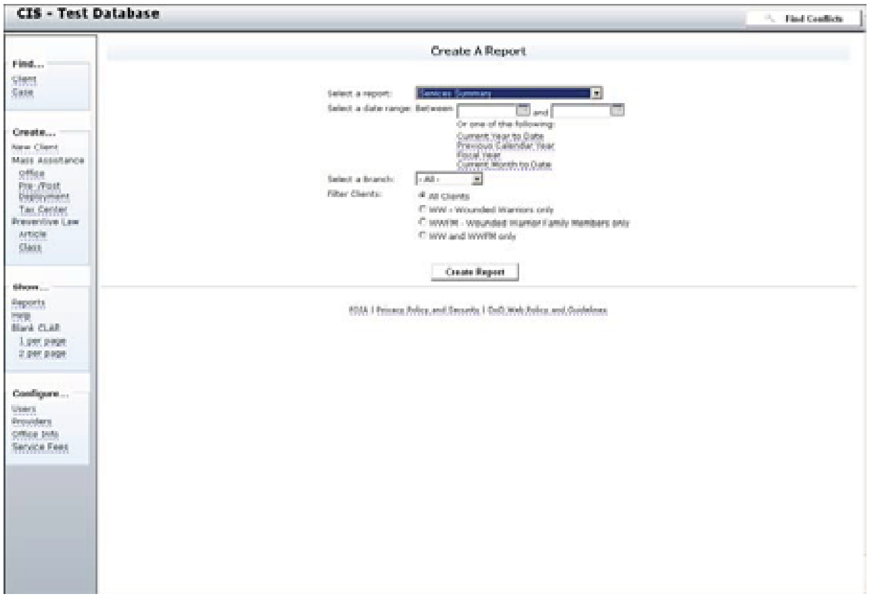


Figure 3.18 Extended Create a Report Screen

4. Enter a date in the first **Select a date range:** field or click  to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

5. Enter a date in the second **Select a date range:** field or click  to the right of the field and adjust the months with the single arrows or the year with the double arrows to locate your desired date.

6. Click the **Select a Branch**: drop-down menu.

7. Select an individual branch or select **All**.

8. Select the desired radio button in the **Filter Clients:** field.

9. Click .

An in-screen report appears.

10. Click .

A new, printer-friendly version of the report appears, as does the Print Screen.

11. Click **Print Report** from the Print Screen to print the current report.

The Services Report Screen appears:

SERVICES REPORT
TEST DATABASE
1/1/2009 TO 1/16/2009

Attorney responsible for report	Office phone	Report run
Shelly Kahl	703-588-9999	1/16/2009 at 1514

Branch: Air Force	Clients: All Clients

Total Clients, Visits and Services							
	Enlisted	Warrant	Comm'd	Ret	Civ	Other	Total
Clients	0	0	0	0	0	1	1
Client Visits	0	0	0	0	0	1	1
Client Services	0	0	0	0	0	5	5

Value of Services		
Service	# Provided	Value of Services
Advance Medical Directive (SV)	0	$0
Alternate dispute resolution (SM)	0	$0
Consultation regarding medical issue (MC)	0	$0
Demobilization Legal Counseling (DE)	0	$0
Edit to Previously Prepared Legal Document (SE)	2	$100
Guidance or Consultation (GC)	0	$0
In-court representation in foreign proceeding (SB)	0	$0
Legal Counseling (SC)	1	$0
Legal Research (LR)	0	$0
Mobilization Deployment Readiness Exercise (MO)	0	$0
No show failed to keep scheduled appointment (NS)	0	$0
Noncombatant Evacuation Operation (NE)	0	$0
Notarization (ZN)	0	$0
Power of attorney prepared, reviewed, edited, and/or executed (SP)	0	$0
Pro se assistance in foreign proceeding (SF)	0	$0
Pro se assistance in Federal (non-military) proceeding (SU)	0	$0
Provided lawyer's name, a list of lawyers' names, or referred to a state or local lawyer referral office (RL)	0	$0
Referral to Reserve component attorney (RR)	0	$0
Referral to a Soldier's counsel attorney (RSC)	0	$0
Referral to civilian attorney b/c matter is outside scope of Legal Assistance (RS)	0	$0
Referral to civilian attorney b/c office only provides limited services (RLS)	0	$0
Referral to civilian attorney b/c matter is outside experience of Legal Assistance attorney in office (RE)	0	$0
Referral to civilian attorney on a reduced-fee basis (RRF)	0	$0
Separation agreement prepared, reviewed, edited, and/or executed (SA)	0	$0
Soldier Readiness Program (SR)	0	$0
State or local income tax return electronically filed (TT)	0	$0
Telephone Call to Client (STB)	1	$20
Will Execution (WE)	1	$75
Will with testamentary trust and guardianship (ST)	0	$0
Total	**5**	**$199**

Figure 3.19 Services Report Screen

4 Miscellaneous

CIS lets you view an online help overview as well as print a Client Card. These functions are described in the sections that follow.

4.1 Using Help

The Help Screen is the default homepage screen for **CIS**. Anytime you would like an abbreviated refresher overview about how **CIS** works, simply click **Help** from the CIS Menu Screen.

4.2 Printing a CLAR

CIS now provides you with the ability to print a Client Card, which is also known as a **CLAR** (Client Legal Assistance Record). A Client Card helps you record client information as well as track when and what type of service you provided to the client. You can print one or two Client Cards per page.

To print a **CLAR**, perform the following steps from **CIS** menu portion of your current screen:

1. Click **1 per page** from the **Show…** portion of the CIS Menu Screen.

A Blank Client Card Screen appears (as well as the Print Screen):

Figure 4.1 Blank Client Card Screen

2. Click the **Print** button from the Print Screen.

Your CLAR is now being printed.

Note: Perform the same steps if you would like to print two Client Cards per page, but in Step 1, click **2 per page** instead of **1 per page**.

Appendix A – CIS Administration

CIS contains Administrator-specific functions for which only certain users are given permission to perform these functions *(**Note:** Only current Administrators can designate other users as Administrators.)*.

These functions include adding users, adding providers, updating office information, and updating service fees. All of these functions are described in the sections that follow.

Adding Users

To add a user, perform the following steps from the CIS Main Menu *(**Note:** As an Administrator, your CIS Main Menu contains a **Configure…**menu that is only visible to Administrators.)*:

1. Click **Users**.

The Users Screen appears:

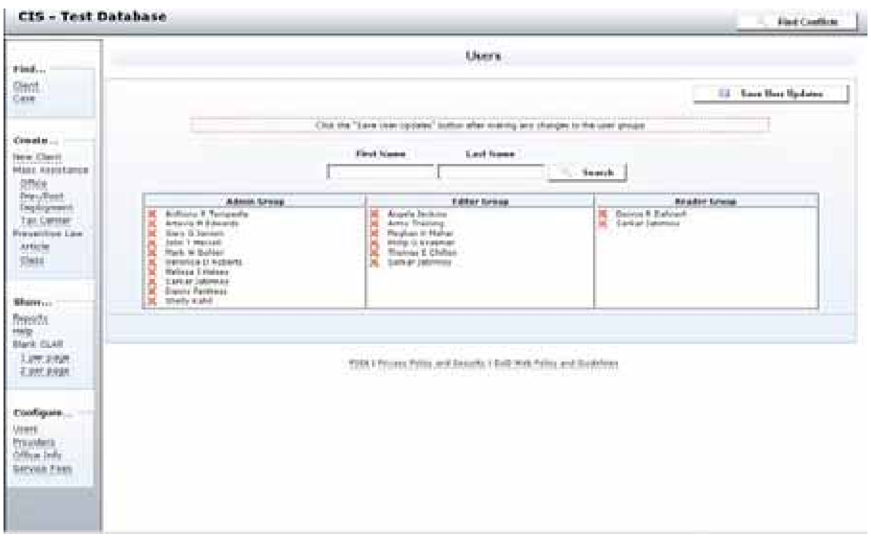


Figure A.1 Users Screen

2. Enter the first name of the person you want to add in the **First Name** field.

3. Enter the last name of the person you want ot add in the **Last Name** field.

4. Click .

The Users Search Results Screen appears:

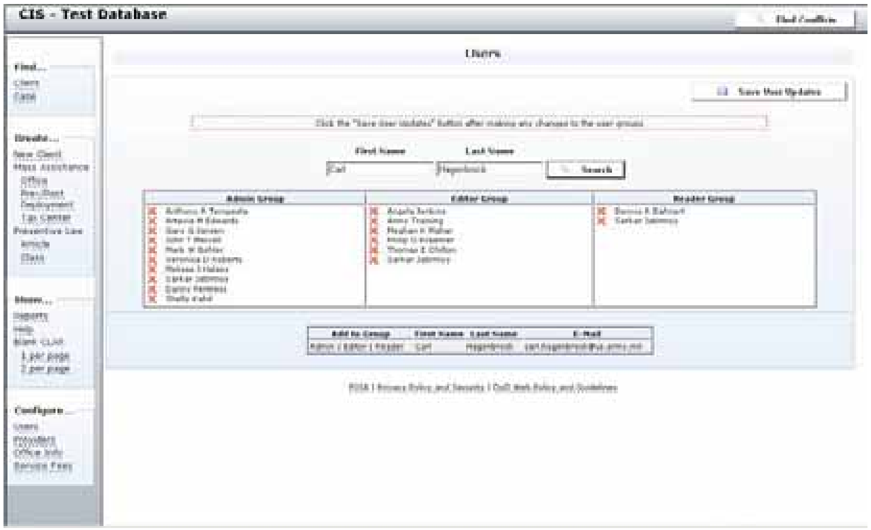
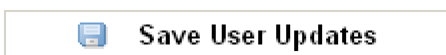


Figure A.2 Users Search Results Screen

*(**Note:** The name you just searched appears in a small box in the bottom, middle of the screen.)*

5. Click the desired user group type from this box, based on the level of access you want this person to have.

6. Click 

.

Adding Providers

To add a provider, perform the following steps from the CIS Main Menu *(**Note:** As an Administrator, your CIS Main Menu contains a **Configure…**menu that is only visible to Administrators.):*

1. Click **Providers**.

The Providers Screen appears:

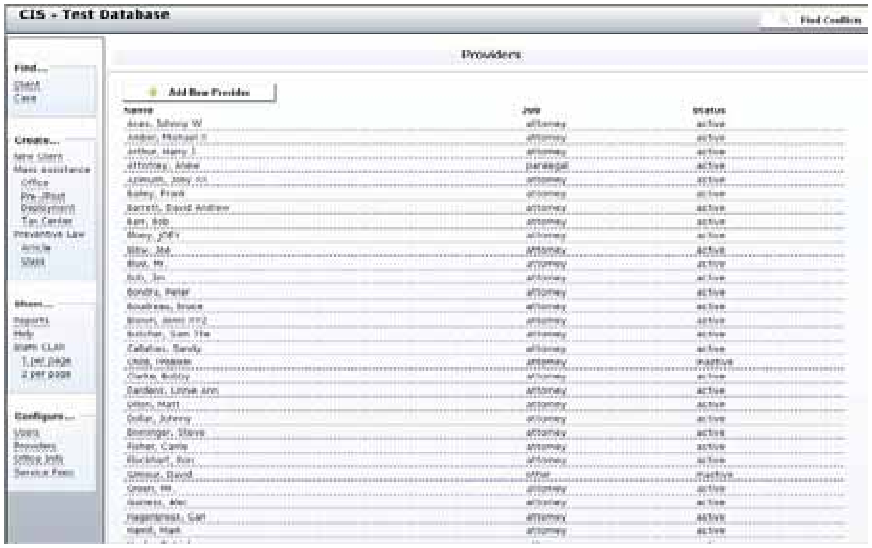


Figure A.3 Providers Screen

2. Click 

.

The Provider Screen appears:

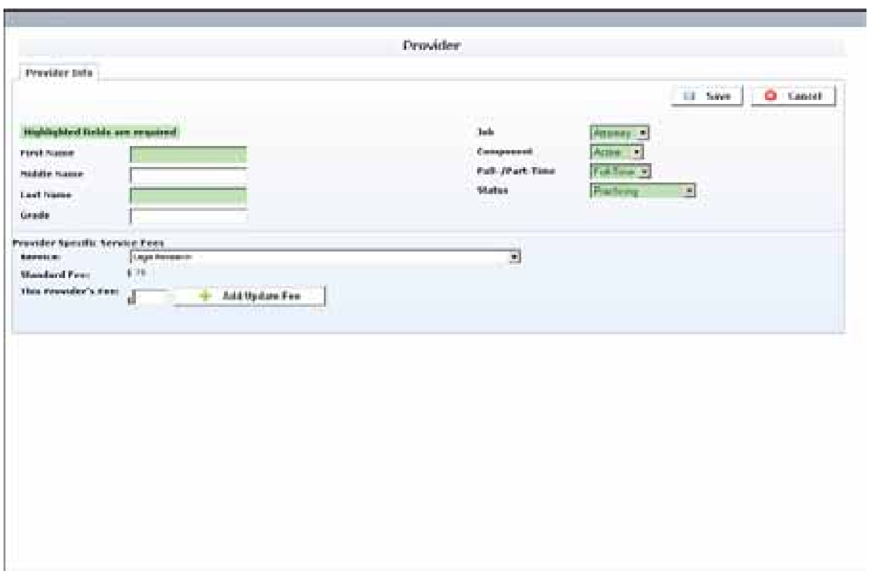


Figure A.4 Provider Screen

*(**Note**: All required fields are highlighted in green.)*

3. Enter the provider's first name in the **First Name** field.

4. Enter the provider's middle name (if known) in the **Middle Name** field.

5. Enter the provider's last name in the **Last Name** field.

6. Enter the provider's grade in the **Grade** field.

7. Click the **Job** drop-down menu and select the desired job type.

8. Click the **Component** drop-down menu and select the component type.

9. Click the **Full-/Part-Time** drop-down menu and select the desired type.

10. Click the **Status** drop-down menu and select the desired type.

11. Click the **Service:** drop-down menu and select the desired service.

The **Standard Fee:** field is auto-populated with that service’s standard fee amount.

12. Enter the current provider’s fee, if different from the standard fee.

13. Click 

.

14. Click 

to save the current changes.

-or-

Click 

to exit the current screen without saving your changes.

Editing Office Information

To edit office information, perform the following steps from the CIS Main Menu *(**Note:** As an Administrator, your CIS Main Menu contains a **Configure…**menu that is only visible to Administrators.)*:

1. Click **Office Info**.

The Office Information Screen appears:

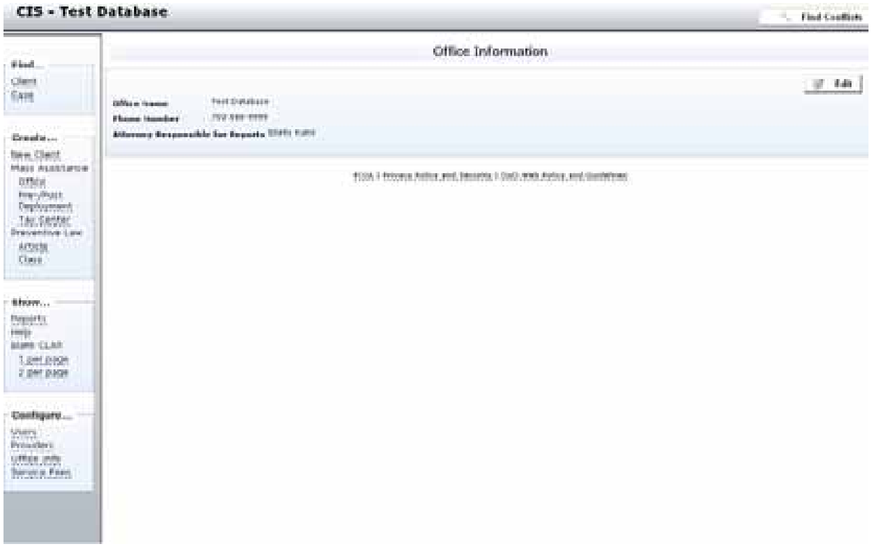


Figure A.5 Office Information Screen

2. Click .

The Active Office Information Screen appears:

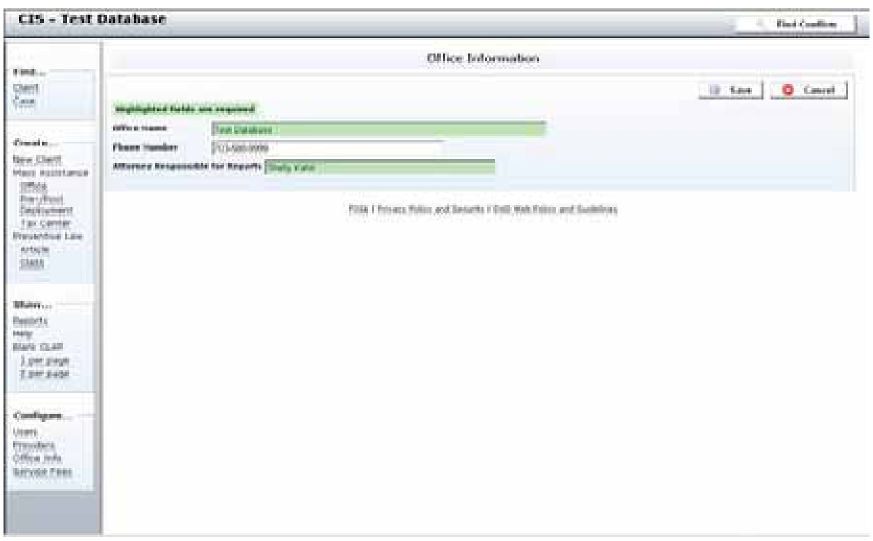


Figure A.6 Active Office Information Screen

*(**Note**: All required fields are highlighted in green.)*

3. Enter any desired updates in the **Office Name** field (which ultimately appears across the top-left of most **CIS** screens).

4. Enter any desired updates in the **Phone Number** field.

5. Enter the name of the attorney responsible for reports in the **Attorney Responsible for Reports** field.

6. Click 

to save the current changes.

-or-

Click 

to exit the current screen without saving your changes.

Editing Service Fees

To edit service fees, perform the following steps from the CIS Main Menu (***Note:*** *As an Administrator, your CIS Main Menu contains a* ***Configure…****menu that is only visible to Administrators.)*:

1. Click **Service Fees**.

The Service Fees Screen appears:

Figure A.7 Service Fees Screen

2. Click 

.

The Active Service Fees Screen appears:

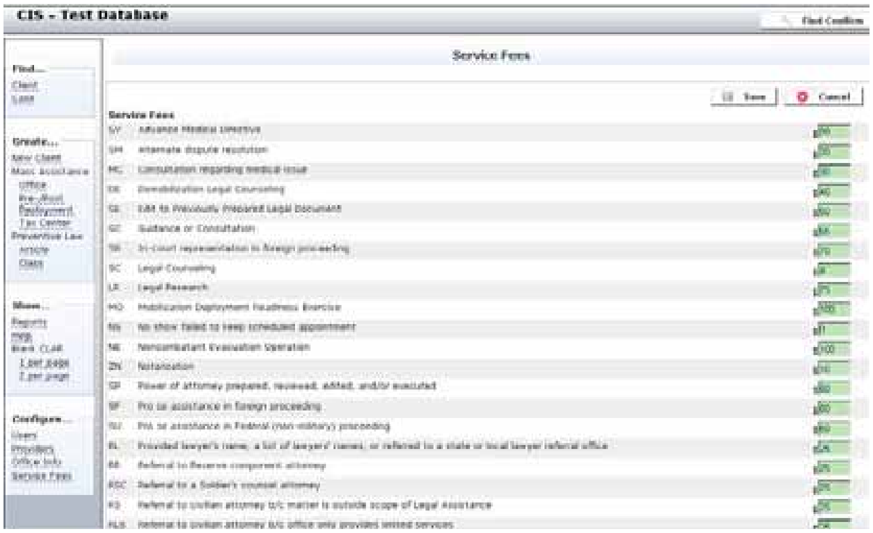


Figure A.8 Active Service Fees Screen

3. Update all desired **Service Fees** and **Mass Assistance Service Fees** (which is not visible on this screen); simply scroll down to view that part of this screen.

4. Click  to save the current changes.

   -or-

   Click  to exit the current screen without saving your changes.

Appendix B – Case Types and Service Types Indices

Case Types

CIS now contains the following new Case Types:

1. **LE – Eviction- Foreclosure on Landlord**. You should use this case type when a client seeks assistance regarding his/her eviction due to a foreclosure on his/her landlord.

2. **PE – Eviction- Foreclosure on Client**. You should use this case type when a client seeks assistance regarding his or her pending or actual foreclosure. You should also use this case type whenever a client expresses questions or concerns regarding mortgages problems.

3. **AI – Immigration**. You should use this case type with any immigration question not concerning citizenship. You should also use this case type for questions about family members seeking residence status changes, etc.

4. **FS – Support Modification**. You should use this case type when a current support order is in place and the client is seeking modification of an existing order or agreement. You should also use this case type when anyone else is seeking modification (for example, Child Support Enforcement Agency is seeking an increase or an ex-wife is seeking an amended support order, etc.).

5. **NS – No Show**. You should use this case type when a client fails to show up for an appointment. You now have the option of entering **No Show** at either the **Case Type** or **Service Type** stage. Ideally, you can still record the **Case Type** based on the information given when the client scheduled the appointment, but if this is not possible, you can record **NS** in the **Case Type** section.

Service Types

CIS now contains the following **Service Types**, which are listed in alphabetical order, below *(**Note:** These Service Types exclude all new codes for MEB/PEB Outreach and Soldiers' Counsel attorneys, which are listed in their own, separate section, below)*:

1. **EC –** This service type denotes that an email or some other form of short (written) correspondence was sent. You should use this service type when communicating with any party to a case (including client or opposing attorney, etc.). This service type is also to be used when you do not consider a "full" code like **SC** or **SL**. In a comparable billing

situation for a private practitioner, this service type would represent a quarter hour of work as opposed to a full hour.

2. **GC –** This service type denotes guidance or consultation. You should use this service type when consulting with a supervising attorney, colleague, or expert regarding a pending case.

3. **LR – Legal Research.** This service type denotes research on a pending case, which can include researching child support guidelines for a Separation Agreement or trustee requirements for a will. In these examples, you should NOT use **ST** or **SA**. You should instead use **LR**.

4. **RE –** This service type denotes referral to a civilian attorney because the matter is outside the experience of the Legal Assistance attorney in that office. You should use this service type when that Legal Assistance office has no attorney with the requisite expertise to handle a matter; for example, in matters such as a complex will or a separation agreement with military retired pay.

5. **RLS –**This service type denotes referral to civilian attorney because that office only provides limited services. You should use this service type when the Legal Assistance office has limited their services offered due to a manpower shortage within the office.

6. **RRF –** This service type denotes referral to a civilian attorney on a reduced-fee basis.

7. **RS –** This service type denotes referral to an alternate attorney or outside agency because the matter is outside the scope of Legal Assistance. You should use this service type when a client needs assistance with something not covered under AR 27-3 (e.g., home-based business or civilian criminal). *(**Note:** A Legal Assistance attorney should not generally see these clients as these case types are prohibited in AR 27-3. RS should be used only for circumstances when clients "sneak" by.)*

8. **RSC –** This service type denotes referral to a Soldier's Counsel attorney or an MEB/PEB Outreach attorney.

9. **SE –** This service type denotes an edit to a previously prepared legal document. You should use this service type when you have already started a document (e.g., You have already entered **SL** or **SA** or **ST** one time for a given case) and the provider goes back to the document to review and change the document *(**Note**: You should use this status in conjunction with **SL**, **SA**, **ST** and **SW**, or when you have started a document and later go back and edit the document.).*

10. **SO –** This service type denotes that another document was prepared and/or executed. You should use this service type for the creation of miscellaneous documents not already

covered; for example, whenever you create and execute a quitclaim deed or qualified domestic order, etc.

11. **STE –** This service type denotes a telephone call to a client (or any party to a case). You should use this service type when you follow up with a client or another party with a brief telephone call. In addition, you should use this service type when **SC** or **SN** is not appropriate because of the abbreviated length of the conversation. If a conversation is extensive enough, **SC**, **SL**, etc., can be used again at the discretion of the provider. Like **EC**, this service type is comparable to a private practitioner's quarter hour billing.

12. **WE –** This service type denotes a will execution. You can use this code instead of **ZN** although you should note that every **WE** indicates or includes notarizations. In addition, the will execution ceremony encompasses a lot of time and/or resources and involves additional legal counseling (instructions for the will and/or medical directive, etc.). You should use a separate code for the ceremony to establish the appropriate value for these combined services AND it will give you the ability to track those will clients who do not return to complete their wills (if a client does not have a **WE** at the culmination of a **WW** case, this status can indicate a will was not executed). When you use this code, you should not fill in any additional **ZNs**, as Legal Assistance will use **WE** to track the average number of notarizations associated with a will execution.

New Case Types/Services for MEB/PEB Outreach Attorneys *(**Note:** No descriptions exist for these service types)***:**

Case Types

1. **MEB – MEB Assistance**

2. **PEB – PEB Assistance**

Service Types

1. **MC – Individual Orientation MEB Counseling**

2. **OM – Ongoing MEB Counseling**

3. **MR – MEB Rebuttal Assistance**

4. **RIR – Request for Independent Medical Review**

5. **RER – Review of Independent Medical Review Report**

6. **PC – Informal PEB Counseling**

7. **PR – Rebuttal to Informal PEB Decision**
8. **PHP – PEB Hearing Preparation (Formal)**
9. **PA – Physical Disability Agency Appeal**
10. **AA – APDAB Appeal**
11. **DA – DOD PDBR Appeal**
12. **ABA – ABCMR Appeal**
13. **DRA – DVA Rating Reconsideration Appeal (DES)**