

Medical-Legal Partnership LegalServer Configuration Guide

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National Center for Medical  Legal Partnership

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The National Center for Medical-Legal Partnership

The National Center for Medical-Legal Partnership's mission is to improve the health and well-being of people and communities by leading health, public health, and legal sectors in an integrated, upstream approach to combating health-harming social conditions. The National Center for Medical-Legal Partnership is a project of the Department of Health Policy and Management at the Milken Institute School of Public Health at the George Washington University. www.medical-legalpartnership.org

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Legal Aid of Arkansas
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About This Guide

This guide was created to meet the need of medical-legal partnerships (MLPs) to track MLP-related data in a consistent, uniform, and reportable manner within their legal aid office's case management system (CMS). In order to determine what fields to designate as uniform MLP fields, representatives of more than a dozen MLPs were interviewed in 2015 to determine how they were or were not capturing data related to their core activities. These MLPs were also asked to share what data their legal teams were currently collecting and how they were collecting it. In early 2016, LegalServer, a CMS used by many MLPs, collaborated with the National Center for Medical-Legal Partnership to build out MLP-related data points and other features in LegalServer.

This configuration guide is one initiative in a longer-term effort to improve the quality and quantity of MLP-related data collected nationally. Currently, the National Center for Medical-Legal Partnership is in the [early phases of testing a set of MLP performance measures](#), and the Association of American Medical Colleges runs [a learning cohort to measure the impact of medical-legal partnership on health inequities](#). The National Center for Medical-Legal Partnership will continue to work to advance MLP-related features across legal aid case management systems.

How to Use This Guide

This Configuration Guide is broken into four sections:

Checklists are intended to be reviewed and completed by the MLP team, which may include frontline legal staff such as intake workers, paralegals, attorneys; supervisors and grants management staff; and health care team members including medical and social work champions. The checklists will help the MLP team systematically review and identify which data fields are most relevant for their MLP practice.

Instruction Sheets provide each legal organization's LegalServer administrator with a step-by-step guide to customizing and configuring LegalServer based upon the information provided by the MLP team in the Checklists.

A List of all MLP Fields, Blocks, and List Views is available for easy reference for MLP teams and LegalServer administrators. A version of this list is maintained by LegalServer and can be found [here](#).

A Glossary defines LegalServer MLP fields and other terms.

If you have questions related to this configuration guide, please contact Mallory Curran at mallory@mallorycurran.com.

Table of Contents

Checklists

#1: Medical Institutions and Sites	5
#2: Referring MLP Health Care Providers	9
#3: Customizing MLP Lookups	11
#4: Branch Logic for MLP Intakes	33
<i>There is no checklist #5.</i>	
#6: MLP Profile View	44
#7: MLP Special Program Pages	56
<i>There is no checklist #8.</i>	
#9: MLP Consults	67
#10: MLP Facilitated Referrals	76
Flowchart.....	77
#11: MLP Trainings	78

Instruction Sheets

#1: Adding Medical Institutions and Sites.....	84
#2: Adding MLP Health Care Providers as Contacts	110
#3: Customizing MLP Lookups	116
#4: Building Branch Logic for MLP Intakes	121
#5: Building Branch Logic for I-HELP	133
#6: Setting up an MLP Profile View	140
#7: Creating an MLP Special Program (or Edit MLP Info) Page.....	151
#8: Tracking Referrals Received from Health Care Partner	161
#9: Setting up MLP Consults in Outreaches	173
#10: Tracking MLP Facilitated Referrals	195
#11: Setting up MLP Trainings	197

List of MLP Fields, Blocks, and List Views	206
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Glossary.....	209
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Checklist #1

MLP Medical Institutions & Departments

(Accompanies Instruction Sheet #1)

MLP Medical Institution Name	MLP Medical Institution Address	MLP Medical Institution Phone	MLP Medical Institution Department Name	MLP Medical Institution Department Address	MLP Medical Institution Department Phone
SAMPLE					
BusyHealth Medical Center	2500 BusyHealth Drive Busytown, OH 44113	216-555-7800			
			BusyHealth – Pediatrics	Same as above X Different <input type="checkbox"/>	Same as above X Different <input type="checkbox"/>
			BusyHealth – Family Medicine	Same as above X Different <input type="checkbox"/>	Same as above X Different <input type="checkbox"/>
			Huckle Community Health Center	Same as above <input type="checkbox"/> Different X 123 Main St Busytown, OH 44115	Same as above <input type="checkbox"/> Different X 216-555-1234
			Neighborhood Community Health Center	Same as above <input type="checkbox"/> Different X 456 Elm Drive Busytown, OH 44105	Same as above <input type="checkbox"/> Different X 216-555-9876

MLP Medical Institution Name	MLP Medical Institution Address	MLP Medical Institution Phone	MLP Medical Institution Department Name	MLP Medical Institution Department Address	MLP Medical Institution Department Phone
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____

MLP Medical Institution Name	MLP Medical Institution Address	MLP Medical Institution Phone	MLP Medical Institution Department Name	MLP Medical Institution Department Address	MLP Medical Institution Department Phone
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____

MLP Medical Institution Name	MLP Medical Institution Address	MLP Medical Institution Phone	MLP Medical Institution Department Name	MLP Medical Institution Department Address	MLP Medical Institution Department Phone
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____
				Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____	Same as above <input type="checkbox"/> Different <input type="checkbox"/> _____

Checklist #2
Referring MLP Providers to Add to LegalServer
 (Accompanies Instruction Sheet #2)

Provider Name	Provider Suffix (e.g., MD, Ph.D, CPNP)	Provider Email	Provider Phone	Provider's MLP Medical Institution

Checklist #3

LegalServer MLP System Lookups

(Accompanies Instruction Sheet #3)

Name of Lookup	Description	Want to Use this Lookup?		List of System Values	Want to Use each Value?		What Order Do You Want the Values In? (Choose Listed Order, Alpha Order <u>or</u> Numerical Order)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes	No	
MLP Medical Practice Area	List of medical specialties	Yes <input type="checkbox"/>	No <input type="checkbox"/>				Alpha Order <input type="checkbox"/> Numerical Order <input type="checkbox"/> (If checked, write in Numerical Order below)
				Dentistry	<input type="checkbox"/>	<input type="checkbox"/>	
				Endocrinology	<input type="checkbox"/>	<input type="checkbox"/>	
				Family Practice	<input type="checkbox"/>	<input type="checkbox"/>	
				Geriatrics	<input type="checkbox"/>	<input type="checkbox"/>	
				Infectious Disease	<input type="checkbox"/>	<input type="checkbox"/>	
				Internal Medicine	<input type="checkbox"/>	<input type="checkbox"/>	
				Neurology	<input type="checkbox"/>	<input type="checkbox"/>	
				OB/Gyn	<input type="checkbox"/>	<input type="checkbox"/>	
				Oncology	<input type="checkbox"/>	<input type="checkbox"/>	
				Ophthalmology	<input type="checkbox"/>	<input type="checkbox"/>	
				Palliative Care	<input type="checkbox"/>	<input type="checkbox"/>	
				Pediatrics	<input type="checkbox"/>	<input type="checkbox"/>	
				Physical Medicine & Rehabilitation	<input type="checkbox"/>	<input type="checkbox"/>	

	Psychiatry	<input type="checkbox"/>	<input type="checkbox"/>	
	Pulmonology	<input type="checkbox"/>	<input type="checkbox"/>	
	Unknown	<input type="checkbox"/>	<input type="checkbox"/>	
	Other	<input type="checkbox"/>	<input type="checkbox"/>	
	List additional values you would like added below			

Name of Lookup	Description	Want to Use this Lookup?		List of System Values	Want to Use each Value?		What Order Do You Want the Values In? (Choose Listed Order, Alpha Order <u>or</u> Numerical Order)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes	No	
MLP Referral Position Type	List of medical positions	Yes <input type="checkbox"/>	No <input type="checkbox"/>				Alpha Order <input type="checkbox"/> Numerical Order <input type="checkbox"/> (If checked, write in Numerical Order below)
				Administrator / Management	<input type="checkbox"/>	<input type="checkbox"/>	
				Care Coordinator / Case Manager	<input type="checkbox"/>	<input type="checkbox"/>	
				Chemical Dependency Counselor	<input type="checkbox"/>	<input type="checkbox"/>	
				Dentist / Dental Assistant	<input type="checkbox"/>	<input type="checkbox"/>	
				Financial Counselor	<input type="checkbox"/>	<input type="checkbox"/>	
				Medical Assistant	<input type="checkbox"/>	<input type="checkbox"/>	
				Medical Student	<input type="checkbox"/>	<input type="checkbox"/>	
				Nurse (RN, LPN)	<input type="checkbox"/>	<input type="checkbox"/>	
				Nurse Practitioner	<input type="checkbox"/>	<input type="checkbox"/>	
				Patient Navigator	<input type="checkbox"/>	<input type="checkbox"/>	
				Physician (Attending)	<input type="checkbox"/>	<input type="checkbox"/>	
				Physician (Fellow)	<input type="checkbox"/>	<input type="checkbox"/>	
				Physician (Resident)	<input type="checkbox"/>	<input type="checkbox"/>	

	Self-referred / returning client	<input type="checkbox"/>	<input type="checkbox"/>	
	Psychologist	<input type="checkbox"/>	<input type="checkbox"/>	
	Social Worker	<input type="checkbox"/>	<input type="checkbox"/>	
	Unknown	<input type="checkbox"/>	<input type="checkbox"/>	
	Other	<input type="checkbox"/>	<input type="checkbox"/>	
	List additional values you would like added below			

Name of Lookup	Description	Want to Use this Lookup?		List of System Values	Want to Use each Value?		What Order Do You Want the Values In? (Choose Listed Order, Alpha Order <u>or</u> Numerical Order)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes	No	
MLP Attendee Position Type	List of positions of medical staff who attend trainings (Used in Outreaches only)	<input type="checkbox"/>	<input type="checkbox"/>				Alpha Order <input type="checkbox"/> Numerical Order <input type="checkbox"/> (If checked, write in Numerical Order below)
				Administrator / Management	<input type="checkbox"/>	<input type="checkbox"/>	
				Care Coordinator / Case Manager	<input type="checkbox"/>	<input type="checkbox"/>	
				Chemical Dependency Counselor	<input type="checkbox"/>	<input type="checkbox"/>	
				Dentist / Dental Assistant	<input type="checkbox"/>	<input type="checkbox"/>	
				Financial Counselor	<input type="checkbox"/>	<input type="checkbox"/>	
				Medical Assistant	<input type="checkbox"/>	<input type="checkbox"/>	
				Medical Student	<input type="checkbox"/>	<input type="checkbox"/>	
				Nurse (RN, LPN)	<input type="checkbox"/>	<input type="checkbox"/>	
				Nurse Practitioner	<input type="checkbox"/>	<input type="checkbox"/>	
				Patient Navigator	<input type="checkbox"/>	<input type="checkbox"/>	
				Physician (Attending)	<input type="checkbox"/>	<input type="checkbox"/>	
				Physician (Fellow)	<input type="checkbox"/>	<input type="checkbox"/>	
				Physician	<input type="checkbox"/>	<input type="checkbox"/>	

	(Resident)			
	Self-referred / returning client	<input type="checkbox"/>	<input type="checkbox"/>	
	Psychologist	<input type="checkbox"/>	<input type="checkbox"/>	
	Social Worker	<input type="checkbox"/>	<input type="checkbox"/>	
	Unknown	<input type="checkbox"/>	<input type="checkbox"/>	
	Other	<input type="checkbox"/>	<input type="checkbox"/>	
	List additional values you would like added below			

Name of Lookup	Description	Want to Use this Lookup?		List of System Values	Want to Use each Value?		What Order Do You Want the Values In? (Choose Listed Order, Alpha Order <u>or</u> Numerical Order)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes	No	
ICD-10 Category	I nternational S tatistical C lassification of D iseases and Related Health Problems (Category)	Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes	No	Listed Order <input type="checkbox"/> Alpha Order <input type="checkbox"/> Numerical Order <input type="checkbox"/> (If checked, write in Numerical Order below)
				Certain infectious and parasitic diseases (A00-B99)	<input type="checkbox"/>	<input type="checkbox"/>	
				Neoplasms (C00-D49)	<input type="checkbox"/>	<input type="checkbox"/>	
				Diseases of the blood and blood-forming organs and certain disorders involving the immune mechanism (D50-D89)	<input type="checkbox"/>	<input type="checkbox"/>	
				Endocrine, nutritional and metabolic diseases (E00-E89)	<input type="checkbox"/>	<input type="checkbox"/>	
				Mental, behavioral and neurodevelopmental disorders (F01-F99)	<input type="checkbox"/>	<input type="checkbox"/>	
				Diseases of the nervous systems	<input type="checkbox"/>	<input type="checkbox"/>	

				(G00-G99)			
				Diseases of the eye and adnexa (H00-H59)	<input type="checkbox"/>	<input type="checkbox"/>	
				Diseases of the ear and mastoid process (H60-H95)	<input type="checkbox"/>	<input type="checkbox"/>	
				Diseases of the circulatory system (I00-I99)	<input type="checkbox"/>	<input type="checkbox"/>	
				Diseases of the respiratory system (J00-J99)	<input type="checkbox"/>	<input type="checkbox"/>	
				Diseases of the digestive system (K00-K95)	<input type="checkbox"/>	<input type="checkbox"/>	
				Diseases of the skin and subcutaneous tissue (L00-L99)	<input type="checkbox"/>	<input type="checkbox"/>	
				Diseases of the musculoskeletal system and connective tissue (M00-M99)	<input type="checkbox"/>	<input type="checkbox"/>	
				Diseases of the genitourinary system (N00-N99)	<input type="checkbox"/>	<input type="checkbox"/>	
				Pregnancy, childbirth and the puerperium (O00-O99)	<input type="checkbox"/>	<input type="checkbox"/>	
				Certain conditions originating in the perinatal period (P00-P96)	<input type="checkbox"/>	<input type="checkbox"/>	
				Congenital malformations,	<input type="checkbox"/>	<input type="checkbox"/>	

				deformations and chromosomal abnormalities (Q00-Q99)			
				Symptoms, signs and abnormal clinical and laboratory findings, not elsewhere classified (R00-R99)	<input type="checkbox"/>	<input type="checkbox"/>	
				Injury, poisoning, and certain other consequences of external causes (S00-T88)	<input type="checkbox"/>	<input type="checkbox"/>	
				Codes for special purposes (U00-U99)	<input type="checkbox"/>	<input type="checkbox"/>	
				External causes of morbidity (V00-Y99)	<input type="checkbox"/>	<input type="checkbox"/>	
				Factors influences health status and contact with health services (Z00-Z99)	<input type="checkbox"/>	<input type="checkbox"/>	
ICD-10 Block	I nternational S tatistical C lassification of D iseases and Related Health Problems (Block)	Yes <input type="checkbox"/>	No <input type="checkbox"/>				
ICD-10 Code/Diagnosis	I nternational S tatistical C lassification of D iseases and Related Health Problems	Yes <input type="checkbox"/>	No <input type="checkbox"/>				

	(Code/Diagnosis)						
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Name of Lookup	Description	Want to Use this Lookup?		List of System Values	Want to Use each Value?		What Order Do You Want the Values In? (Choose Listed Order, Alpha Order <u>or</u> Numerical Order)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes	No	
MLP Relationship of client to referred patient	List of possible relationships of client to the patient referred to the MLP	<input type="checkbox"/>	<input type="checkbox"/>				Listed Order <input type="checkbox"/> Alpha Order <input type="checkbox"/> Numerical Order <input type="checkbox"/> (If checked, write in Numerical Order below)
				Self (Patient is the Client)	<input type="checkbox"/>	<input type="checkbox"/>	
				Parent	<input type="checkbox"/>	<input type="checkbox"/>	
				Spouse	<input type="checkbox"/>	<input type="checkbox"/>	
				Child	<input type="checkbox"/>	<input type="checkbox"/>	
				Grandparent	<input type="checkbox"/>	<input type="checkbox"/>	
				Aunt / Uncle	<input type="checkbox"/>	<input type="checkbox"/>	
				Other family member	<input type="checkbox"/>	<input type="checkbox"/>	
				Friend / Family Friend	<input type="checkbox"/>	<input type="checkbox"/>	
				Non-relative caregiver (legal guardian)	<input type="checkbox"/>	<input type="checkbox"/>	
				Non-relative caregiver (no legal status)	<input type="checkbox"/>	<input type="checkbox"/>	

	List additional values you would like added below			

Name of Lookup	Description	Want to Use this Lookup?		List of System Values	Want to Use each Value?		What Order Do You Want the Values In? (Choose Listed Order, Alpha Order <u>or</u> Numerical Order)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes	No	
MLP I-HELP Category	List of categories used by MLP medical partners to describe legal cases	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Listed Order <input type="checkbox"/> Alpha Order <input type="checkbox"/> Numerical Order <input type="checkbox"/> (If checked, write in Numerical Order below)
				Income & Insurance	<input type="checkbox"/>	<input type="checkbox"/>	
				Housing & Utilities	<input type="checkbox"/>	<input type="checkbox"/>	
				Education & Employment	<input type="checkbox"/>	<input type="checkbox"/>	
				Legal Status	<input type="checkbox"/>	<input type="checkbox"/>	
				Personal & Family Stability	<input type="checkbox"/>	<input type="checkbox"/>	

Name of Lookup	Description	Want to Use this Lookup?		List of System Values	Want to Use each Value?		What Order Do You Want the Values In? (Choose Listed Order, Alpha Order <u>or</u> Numerical Order)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes	No	
MLP Special Population	List of special patient populations the National Center is asking sites to track	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Listed Order <input type="checkbox"/> Alpha Order <input type="checkbox"/> Numerical Order <input type="checkbox"/> (If checked, write in Numerical Order below)
				Child	<input type="checkbox"/>	<input type="checkbox"/>	
				Older Adult (60+)	<input type="checkbox"/>	<input type="checkbox"/>	
				Veteran	<input type="checkbox"/>	<input type="checkbox"/>	
				Chronic Illness	<input type="checkbox"/>	<input type="checkbox"/>	
				Homeless / Unstably Housed	<input type="checkbox"/>	<input type="checkbox"/>	

Name of Lookup	Description	Want to Use this Lookup?		List of System Values	Want to Use each Value?		What Order Do You Want the Values In? (Choose Listed Order, Alpha Order <u>or</u> Numerical Order)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes	No	
MLP Patient SDOH Risk Categories	List of factors contributing to Social Determinants of Health)	Yes <input type="checkbox"/>	No <input type="checkbox"/>				Alpha Order <input type="checkbox"/> Numerical Order <input type="checkbox"/> (If checked, write in Numerical Order below)
				Advanced Age of Patient's Caregiver	<input type="checkbox"/>	<input type="checkbox"/>	
				Child Welfare System Involvement	<input type="checkbox"/>	<input type="checkbox"/>	
				Custody Dispute	<input type="checkbox"/>	<input type="checkbox"/>	
				Domestic Abuse	<input type="checkbox"/>	<input type="checkbox"/>	
				Eviction, History of	<input type="checkbox"/>	<input type="checkbox"/>	
				Foreclosure	<input type="checkbox"/>	<input type="checkbox"/>	
				Homelessness, Current	<input type="checkbox"/>	<input type="checkbox"/>	
				Homelessness, History of	<input type="checkbox"/>	<input type="checkbox"/>	
				Immigration Problems	<input type="checkbox"/>	<input type="checkbox"/>	
				Parent / Caregiver Low Education Level	<input type="checkbox"/>	<input type="checkbox"/>	
				Parent / Caregiver Language Barrier			

	Parent / Caregiver Mental Health Issue			
	Parent Criminal Record	<input type="checkbox"/>	<input type="checkbox"/>	
	Patient Criminal Record	<input type="checkbox"/>	<input type="checkbox"/>	
	Patient Language Barrier	<input type="checkbox"/>	<input type="checkbox"/>	
	Patient Limited Literacy	<input type="checkbox"/>	<input type="checkbox"/>	
	Patient Low Education Level	<input type="checkbox"/>	<input type="checkbox"/>	
	Utility Shut-Off, History of	<input type="checkbox"/>	<input type="checkbox"/>	
	List additional values you would like added below			

Name of Lookup	Description	Want to Use this Lookup?		List of System Values	Want to Use each Value?		What Order Do You Want the Values In? (Choose Listed Order, Alpha Order <u>or</u> Numerical Order)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes	No	
MLP Outcome of Referral Rec'd from Health Care Site	What happened after a medical partner referred a patient to the MLP	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Listed Order <input type="checkbox"/> Alpha Order <input type="checkbox"/> Numerical Order <input type="checkbox"/> (If checked, write in Numerical Order below)
				Intake completed & case accepted	<input type="checkbox"/>	<input type="checkbox"/>	
				Patient-client did not have a legal issue	<input type="checkbox"/>	<input type="checkbox"/>	
				Patient did not respond to our attempts to contact	<input type="checkbox"/>	<input type="checkbox"/>	
				Patient rejected our services / withdrew / no show	<input type="checkbox"/>	<input type="checkbox"/>	
				Intake completed, but conflict of interest	<input type="checkbox"/>	<input type="checkbox"/>	
				Intake completed, but issue outside acceptance policies	<input type="checkbox"/>	<input type="checkbox"/>	
				Intake completed,	<input type="checkbox"/>	<input type="checkbox"/>	

	but patient-client over assets / income			
	Patient provided with facilitated referral to other legal institution	<input type="checkbox"/>	<input type="checkbox"/>	
	List additional values you would like added below	<input type="checkbox"/>	<input type="checkbox"/>	

Name of Lookup	Description	Want to Use this Lookup?		List of System Values	Want to Use each Value?		What Order Do You Want the Values In? (Choose Listed Order, Alpha Order or Numerical Order)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes	No	
MLP Output for Health Care Partner	Activities performed by legal staff on behalf of a referred patient	<input type="checkbox"/>	<input type="checkbox"/>				Listed Order <input type="checkbox"/> Alpha Order <input type="checkbox"/> Numerical Order <input type="checkbox"/> (If checked, write in Numerical Order below)
				Accommodated patient need for home / hospital visit	<input type="checkbox"/>	<input type="checkbox"/>	
				Appeared at administrative hearing on behalf of client	<input type="checkbox"/>	<input type="checkbox"/>	
				Attended IEP, disciplinary, or other educational meeting with student	<input type="checkbox"/>	<input type="checkbox"/>	
				Appeared in court on behalf of client	<input type="checkbox"/>	<input type="checkbox"/>	
				Placed client with pro bono attorney	<input type="checkbox"/>	<input type="checkbox"/>	
				Placed client with free law school clinic	<input type="checkbox"/>	<input type="checkbox"/>	

	Assisted client with preparation of legal documents	<input type="checkbox"/>	<input type="checkbox"/>	
	Assisted client with preparation of administrative documents	<input type="checkbox"/>	<input type="checkbox"/>	
	Provided client with advice about legal problem	<input type="checkbox"/>	<input type="checkbox"/>	
	Removed social or legal barrier to hospital discharge	<input type="checkbox"/>	<input type="checkbox"/>	
	Patient Referred to other source of support	<input type="checkbox"/>	<input type="checkbox"/>	
	Lost case	<input type="checkbox"/>	<input type="checkbox"/>	
	List additional values you would like added below			

Name of Lookup	Description	Want to Use this Lookup?		List of System Values	Want to Use each Value?		What Order Do You Want the Values In? (Choose Listed Order, Alpha Order <u>or</u> Numerical Order)
		Yes	No		Yes	No	
MLP Outcome of Facilitated Referral	Outcome of referral you “hand placed” with another legal org (provided a “warm hand-off”)	Yes <input type="checkbox"/>	No <input type="checkbox"/>				Listed Order <input type="checkbox"/> Alpha Order <input type="checkbox"/> Numerical Order <input type="checkbox"/> (If checked, write in Numerical Order below)
				Patient placed internally w/ non-MLP project	<input type="checkbox"/>	<input type="checkbox"/>	
				Patient placed w/ a free attorney (confirmed)	<input type="checkbox"/>	<input type="checkbox"/>	
				Patient placed w/ low cost attorney (confirmed)	<input type="checkbox"/>	<input type="checkbox"/>	
				Patient placed with law school clinic (confirmed)	<input type="checkbox"/>	<input type="checkbox"/>	
				Patient referred to source of short-term legal assistance (such as pro bono clinic or pro se help desk)	<input type="checkbox"/>	<input type="checkbox"/>	
				Patient referred to	<input type="checkbox"/>	<input type="checkbox"/>	

	Bar Association			
	Patient referred to other organization offering free civil legal assistance	<input type="checkbox"/>	<input type="checkbox"/>	
	Patient referred to organization providing free criminal legal assistance	<input type="checkbox"/>	<input type="checkbox"/>	
	List additional values you would like added below			

Checklist #4

Setting Up LegalServer MLP Intake

(Accompanies Instruction Sheet #4)

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block <u>Required</u> on Intake?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
		Yes	No		Yes	No			
MLP: Date referral received	Date you received referral from MLP medical institution.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Show date picker Min date: ----- Max date: -----
MLP: Date referral confirmed	Date you confirmed to MLP medical institution that you rec'd the referral.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Show date picker Min date: ----- Max date: -----
MLP: Medical Institution	Name of the MLP Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Medical Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?	What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
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Medical Institution Department	Name of the location / site/ department within the MLP Medical Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Medical Institution Department	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
MLP: Medical practice area	Medical practice area of referral (e.g., pediatrics, family medicine)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Medical practice area	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----
MLP: Referral position type	Position of the person making the referral (e.g., physician, social worker, self-referral/returning client)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Referral position type	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?	What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
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MLP Medical Provider (In Contact module of LegalServer)	Name of the individual medical provider who made the referral	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Contact Types	Yes <input type="checkbox"/>	No <input type="checkbox"/>			
MLP: Is the client also the patient referred	Are the patient referred and the client the same person?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Relationship of client to the referred patient	What is the relationship of the client to the patient referred? (e.g., child, spouse)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Relationship of client to the referred patient	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
Add Household Member	If the patient is the not the client, add the patient's identifying information through this block (<u>not an MLP-specific block</u>)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>			
MLP: Medical Record Number	What is the MRN of the patient referred?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>			
MLP: ICD-10 Category	Top level categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Category	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
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MLP: ICD-10 Block	Mid-level categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Block	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: ICD-10 Diagnosis	Specific categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Diagnosis	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Special Population	The National Center for MLP is asking programs to track 5 special populations. Using this field will help w/ annual report to National Center.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Special Population	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?	What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
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MLP: Patient SDOH Risk Categories	Options to select social determinants of health that often negatively impact health	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Patient SDOH Risk Categories	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Number of ED visits in the past year	How many times has the patient gone to the emergency department/room in the past year?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Max value: __ Min value: __
MLP: Number of hospitalizations in the past year		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Max value: __ Min value: __
MLP: Is the patient pregnant at intake?		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: If patient		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/>	Max value: __

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
is pregnant at intake, how many weeks?		<input type="checkbox"/>	<input type="checkbox"/>					Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Min value: __
MLP: Is the patient post-partum at intake?		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: If patient post-partum at intake, how many months?	How long ago (in months) did the patient give birth?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Max value: __ Min value: __

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?	What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
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MLP: I-HELP Category	Which I-HELP category does the legal case best fit in to?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: I-HELP Category	Yes <input type="checkbox"/>	No <input type="checkbox"/>	No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Outcome of referral received from health care site	What happened after the referral was made? (e.g., intake completed/case accepted, client did not follow-up/no show)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Outcome of referral received from health care site	Yes <input type="checkbox"/>	No <input type="checkbox"/>	No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

If you want to create & add site-specific MLP fields, add them here

Name of Site-Specific Field	Description	Want to Use this Field or Block?	Associated Lookup	Want the Site-Specific Field Required on Intake?	What Order Do You Want the Field/Block In? (Write in Numerical Order below)	Want a Default Value for Intake?	Misc. Options
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>	No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
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		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Checklist #6

Setting Up a LegalServer MLP Profile View

(Accompanies Instruction Sheet #6)

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in? (You can develop your own tab names if you wish)	What Order within the Tab? (Write in Order below)	Editable on Which Dispositions?	Misc. Options (circle if yes)
MLP: Date referral received	Date you received referral from MLP medical institution.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	Show date picker Min date: ----- Max date: -----
MLP: Date referral confirmed	Date you confirmed to MLP medical institution that you rec'd the referral.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	Show date picker Min date: ----- Max date: -----
MLP: Medical Institution	Name of the MLP Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Medical Institution	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options (circle if yes)
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Medical Institution Department	Name of the location / site/ department within the MLP Medical Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Medical Institution Department	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
MLP: Medical practice area	Medical practice area of referral (e.g., pediatrics, family medicine)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Medical practice area	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options (circle if yes)
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MLP: Referral position type	Position of the person making the referral (e.g., physician, social worker, self-referral/returning client)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Referral position type	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
MLP Medical Provider (Contact)	Name of the individual medical provider who made the referral	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Contact Types	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
MLP: Is the client also the patient referred	Are the patient referred and the client the same person?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options (circle if yes)
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MLP: Relationship of client to the referred patient	What is the relationship of the client to the patient referred? (e.g., child, spouse)	Yes	No	MLP: Relationship of client to the referred patient	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>					

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options (circle if yes)
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Add Household Member	If the patient is the not the client, add the patient's identifying information through this block (<u>not an MLP-specific block</u>)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
MLP: Medical Record Number	What is the MRN of the patient referred?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
MLP: ICD-10 Category	Top level categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Category	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options (circle if yes)
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MLP: ICD-10 Block	Mid-level categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Block	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
MLP: ICD-10 Diagnosis	Specific categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Diagnosis	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
MLP: Special Population	The National Center for MLP is asking programs to track 5 special populations. Using this field will help w/ annual report to National Center.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Special Population	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options (circle if yes)
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MLP: Patient SDOH Risk Categories	Options to select social determinants of health that often negatively impact health	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Patient SDOH Risk Categories	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
MLP: Number of ED visits in the past year	How many times has the patient gone to the emergency department/room in the past year?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	Max value: __ Min value: __
MLP: Number of hospitalizations in the past year		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	Max value: __ Min value: __
MLP: Is the patient pregnant at intake?		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options (circle if yes)
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MLP: If patient is pregnant at intake, how many weeks?		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	Max value: -- Min value: __
MLP: Is the patient post-partum at intake?		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
MLP: If patient post-partum at intake, how many months?	How long ago (in months) did the patient give birth?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	Max value: -- Min value: __

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options (circle if yes)
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MLP: I-HELP Category	Which I-HELP category does the legal case best fit in to?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: I-HELP Category	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
MLP: Outcome of referral received from health care site	What happened after the referral was made? (e.g., intake completed/case accepted, client did not follow-up/no show)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Outcome of referral received from health care site	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	

If you want to add site-specific MLP fields or existing non-MLP fields add them here

Name of Site-Specific MLP Field or Existing non-MLP Field	Description	Site-Specific MLP Field or Existing Field?	What Tab Do You Want the Field/Block in?	What Order within the Tab? (Write in Order below)	Editable on Which Dispositions?	Misc. Options
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info..... <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info . <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info..... <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info . <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info..... <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info . <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info..... <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info . <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen <input type="checkbox"/> Rejected <input type="checkbox"/> None <input type="checkbox"/>	

Name of Site-Specific MLP Field or Existing non-MLP Field	Description	Site-Specific MLP Field or Existing Field?	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options
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		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected ... <input type="checkbox"/> None <input type="checkbox"/>	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected ... <input type="checkbox"/> None <input type="checkbox"/>	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected ... <input type="checkbox"/> None <input type="checkbox"/>	

Name of Site-Specific MLP Field or Existing non-MLP Field	Description	Site-Specific MLP Field or Existing Field?	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options
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		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected ... <input type="checkbox"/> None <input type="checkbox"/>	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected ... <input type="checkbox"/> None <input type="checkbox"/>	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		Closed <input type="checkbox"/> Incomplete Intake <input type="checkbox"/> Open <input type="checkbox"/> Prescreen .. <input type="checkbox"/> Rejected ... <input type="checkbox"/> None <input type="checkbox"/>	

Checklist #7

Setting Up a LegalServer MLP Special Program Page (aka "Edit MLP Information" Page)

(Accompanies Instruction Sheet #7)

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	What Heading Do You Want the Field/Block under? (You can develop your own Heading names if you wish)	What Order w/in the Heading? (Write in Order below)	Do you want a Default for fields which have not been completed yet?	Misc. Options (circle if yes)
		Yes	No					
MLP: Date referral received	Date you received referral from MLP medical institution.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Show date picker Min date: ----- Max date: -----
MLP: Date referral confirmed	Date you confirmed to MLP medical institution that you rec'd the referral.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Show date picker Min date: ----- Max date: -----

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Do you want a Default?	Misc. Options (circle if yes)
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MLP: Medical Institution	Name of the MLP Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Medical Institution	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
Medical Institution Department	Name of the location / site/ department within the MLP Medical Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Medical Institution Department	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Medical practice area	Medical practice area of referral (e.g., pediatrics, family medicine)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Medical practice area	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Do you want a Default?	Misc. Options (circle if yes)
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MLP: Referral position type	Position of the person making the referral (e.g., physician, social worker, self-referral/returning client)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Referral position type	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP Medical Provider (Contact)	Name of the individual medical provider who made the referral	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Contact Types	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Is the client also the patient referred	Are the patient referred and the client the same person?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Relationship of client to the referred patient	What is the relationship of the client to the patient referred? (e.g., child, spouse)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Relationship of client to the referred patient	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Do you want a Default?	Misc. Options (circle if yes)
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Add Household Member	If the patient is the not the client, add the patient's identifying information through this block (<u>not an MLP-specific block</u>)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Medical Record Number	What is the MRN of the patient referred?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: ICD-10 Category	Top level categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Category	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Do you want a Default?	Misc. Options (circle if yes)
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MLP: ICD-10 Block	Mid-level categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Block	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: ICD-10 Diagnosis	Specific categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Diagnosis	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Special Population	The National Center for MLP is asking programs to track 5 special populations. Using this field will help w/ annual report to National Center.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Special Population	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Do you want a Default?	Misc. Options (circle if yes)
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MLP: Patient SDOH Risk Categories	Options to select social determinants of health that often negatively impact health	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Patient SDOH Risk Categories	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Number of ED visits in the past year	How many times has the patient gone to the emergency department/room in the past year?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Max value: __ Min value: __
MLP: Number of hospitalizations in the past year		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Max value: __ Min value: __

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Do you want a Default?	Misc. Options (circle if yes)
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MLP: Is the patient pregnant at intake?		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: If patient is pregnant at intake, how many weeks?		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Max value: __ Min value: __
MLP: Is the patient post-partum at intake?		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: If patient post-partum at intake, how many months?	How long ago (in months) did the patient give birth?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Max value: __ Min value: __

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Do you want a Default?	Misc. Options (circle if yes)
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MLP: I-HELP Category	Which I-HELP category does the legal case best fit in to?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: I-HELP Category	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----
MLP: Outcome of referral received from health care site	What happened after the referral was made? (e.g., intake completed/case accepted, client did not follow-up/no show)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Outcome of referral received from health care site	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info . <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----

If you want to add site-specific MLP fields or existing non-MLP fields add them here						
Name of Site-Specific MLP Field or Existing non-MLP Field	Description	Site-Specific MLP Field or Existing Field?	What Tab Do You Want the Field/Block in?	What Order within the Tab? (Write in Order below)	Do you want a Default?	Misc. Options
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info..... <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info . <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info..... <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info . <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info..... <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info . <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info..... <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info . <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Site-Specific MLP Field or Existing non-MLP Field	Description	Site-Specific MLP Field or Existing Field?	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options
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		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Site-Specific MLP Field or Existing non-MLP Field	Description	Site-Specific MLP Field or Existing Field?	What Tab Do You Want the Field/Block in?	What Order within the Tab?	Editable on Which Dispositions?	Misc. Options
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		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Site-specific MLP <input type="checkbox"/> Existing <input type="checkbox"/>	MLP Referral Info <input type="checkbox"/> MLP Patient Info <input type="checkbox"/> MLP Health Info <input type="checkbox"/> MLP Legal Case Info .. <input type="checkbox"/> MLP End of Case Info <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Checklist #9

Setting Up LegalServer MLP Consults

(Accompanies Instruction Sheet #9)

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Opening?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for MLP Consult?	Misc. Options (circle if yes)
		Yes	No		Yes	No			
Date (note: not an MLP-specific field)	Date the MLP Consult was initiated	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> If yes: Today <input type="checkbox"/> Yesterday <input type="checkbox"/>	Show date picker Min date: _____ Max date: _____
Name (note: not an MLP-specific field)	Name of the MLP Consult	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/>	
Staff (note: not an MLP-specific field)	Staff who are working on the MLP Consult	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> If yes: User entering the MLP Consult <input type="checkbox"/> Another user: _____ _____ <input type="checkbox"/>	

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	Want the Field/Block Required on Opening?	What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
------------------------	-------------	----------------------------------	--------------------------------------	---	---	----------------------------------	-------------------------------

MLP: Medical Institution	Name of the MLP Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Medical Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----
Medical Institution Department	Name of the location / site/ department within the MLP Medical Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Medical Institution Department	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
MLP: Medical practice area	Medical practice area of referral (e.g., pediatrics, family medicine)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Medical practice area	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----
MLP: Referral position type	Position of the person making the referral (e.g., physician, social worker, self-referral/returning client)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Referral position type	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value for the default) -----

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	Want the Field/Block Required on Opening?	What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
------------------------	-------------	----------------------------------	--------------------------------------	---	---	----------------------------------	-------------------------------

MLP Medical Provider (Contact) (note: not an MLP-specific field)	Name of the individual medical provider who requested the MLP Consult field)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Contact Types	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
MLP: Medical Record Number	MRN of the patient about whom the consult is requested.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		Max digits: -----
MLP: Patient Name	Name of the patient about whom the consult is requested.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		
MLP: Patient Age	Age of the patient about whom the consult is requested.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		Min age: ----- Max age: -----

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Opening?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
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Zip Code (note: not an MLP-specific field; will need to be built as number field if not already using it in Outreach; fancy zip not available in Outreaches)	Zip code of the patient about whom the consult is requested.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>			
MLP: ICD-10 Category	Top level categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Category	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: ICD-10 Block	Mid-level categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Block	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Opening?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
MLP: ICD-10 Diagnosis	Specific categorization of patient's ICD-10 code	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: ICD-10 Diagnosis	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Special Population	The National Center for MLP is asking programs to track 5 special populations. Using this field will help w/ annual report to National Center.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Special Population	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
Legal Problem Code (note: not an MLP-specific field)		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Opening?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
Special Legal Problem Code (note: not an MLP-specific field)		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: I-HELP Category	Which I-HELP category does the legal case best fit in to?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: I-HELP Category	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Summary for Medical Record		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	Want the Field/Block Required on Opening?	What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
------------------------	-------------	----------------------------------	--------------------------------------	---	---	----------------------------------	-------------------------------

Matter Reporting Code (note: not an MLP-specific field)	Matter Reporting Code (mostly used by LSC-funded entities)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>	No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	Max value: __ Min value: __
Outreach Status (note: not an MLP-specific field)		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>	No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
Good Story (note: not an MLP-specific field)		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>	No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	Want the Field/Block Required on Opening?	What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
------------------------	-------------	----------------------------------	--------------------------------------	---	---	----------------------------------	-------------------------------

If you want to create & add site-specific MLP fields, add them here							
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>	No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>	No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>	No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Opening?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
------------------------	-------------	----------------------------------	--	--------------------------------------	---	--	---	----------------------------------	-------------------------------

		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Checklist #10

Setting Up LegalServer MLP Facilitated Referrals

(Accompanies Flowchart #10 and Instruction Sheet #10)

What is an MLP Facilitated Referral?

Many MLPs spend a significant amount of time on Facilitated Referrals, also known as “warm hand-offs,” where they help place an MLP patient with another legal organization in the community. Much more than simply giving a phone number and advising the patient to call the other organization, a Facilitated Referral often involves providing a basic assessment of the client’s case, developing relationships with intake and other staff at the other organization, and actively setting up an intake or other appointment for the patient. For example, an MLP staff person at an LSC-funded organization that does not take immigration cases may learn how to assess patients who may be eligible for immigration relief under VAWA or a U-visa and help connect those patients with an immigration law organization.

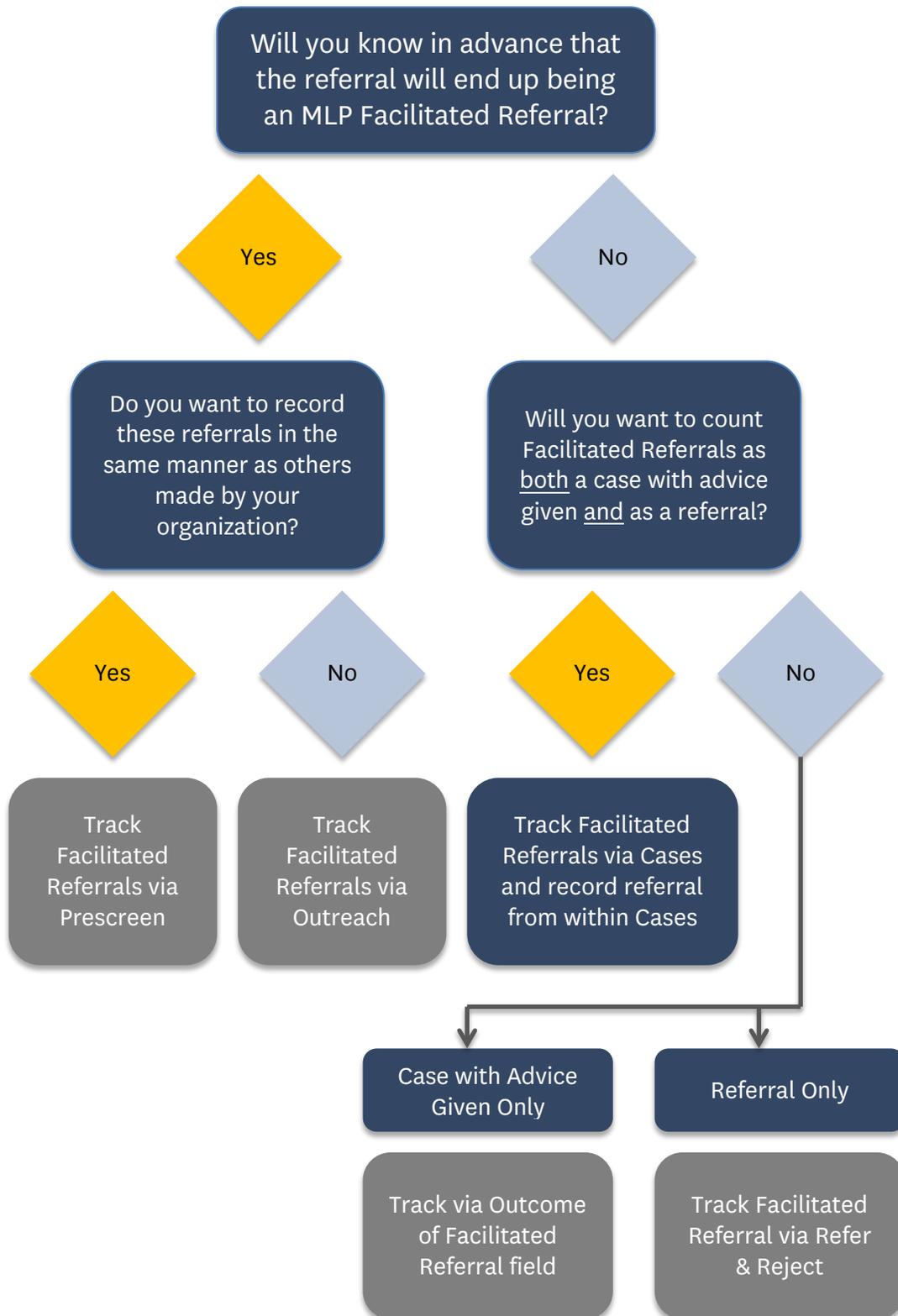
Because of the time and effort involved in these placements, many MLPs are interested in being able to track time and (potentially) outcomes for the MLP patients who are referred.

Multiple Options

There are multiple options for setting up MLP Facilitated Referrals. See Flowchart #10 on the next page to help determine what is best for your MLP.

There is no specific Checklist for MLP Facilitated Referrals.

Flowchart #10: How Should We Track MLP Facilitated Referrals in Legal Server?



Checklist #11

Setting Up LegalServer MLP Trainings

(Accompanies Instruction Sheet #11)

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block <u>Required</u> on Opening?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value?	Misc. Options (circle if yes)
		Yes	No		Yes	No			
Date (note: not an MLP-specific field)	Date the MLP Training was conducted	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> If yes: Today <input type="checkbox"/> Yesterday <input type="checkbox"/>	Show date picker Min date: ----- Max date: -----
Date Entered (note: not an MLP-specific field)	Date the MLP Training was entered into LegalServer	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> If yes: Today <input type="checkbox"/> Yesterday <input type="checkbox"/>	Show date picker Min date: ----- Max date: -----
Name (note: not an MLP-specific field)	Name of the MLP Training	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>			

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
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MLP: Title of Training / Presentation	Name of the MLP Training (you may wish to use this if your organization is not using the "Name" field to track other training names)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>			
Staff (note: not an MLP-specific field)	Staff who conducted the MLP Training	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> If yes: User entering the MLP Training <input type="checkbox"/> Another user: _____ _____ <input type="checkbox"/>	
MLP: Medical Institution	Name of the MLP Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Medical Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) _____	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
------------------------	-------------	----------------------------------	--	--------------------------------------	--	--	---	----------------------------------	-------------------------------

Medical Institution Department	Name of the location / site/ department within the MLP Medical Institution	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Medical Institution Department	Yes <input type="checkbox"/>	No <input type="checkbox"/>			
MLP: Medical practice area	Medical practice for whom training was done (e.g., pediatrics, family medicine)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Medical practice area	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP: Attendee position type	Position/s of the people attending the training (e.g., physician, social worker)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: Attendee Position Type	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
MLP Medical Provider (Contact) (note: not an MLP-specific field)	Name of the individual medical providers who attended the MLP Training	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Contact Types	Yes <input type="checkbox"/>	No <input type="checkbox"/>			

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?	What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
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Number of Attendees (Actual) (note: not an MLP-specific field)	Actual number of people who attended the training	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		Max digits: -----
Number of Attendees (Estimated) (note: not an MLP-specific field)	Estimated number of people who attended the training.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		Max digits: -----
Legal Problem Code (note: not an MLP-specific field)		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>	No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
Special Legal Problem Code (note: not an MLP-specific field)		Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>	No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

Name of Field or Block	Description	Want to Use this Field or Block?		Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?		What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
------------------------	-------------	----------------------------------	--	--------------------------------------	--	--	---	----------------------------------	-------------------------------

MLP: I-HELP Category	Which I-HELP category does the subject of the training best fit in to?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	MLP: I-HELP Category	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
Matter Reporting Code (note: not an MLP-specific field)	Matter Reporting Code (mostly used by LSC-funded entities)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
Outreach Status (note: not an MLP-specific field)	Individual sites can select (and create) these options, which could include: Active, Ready to Close, Closed by Supervisor, etc.	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
Active (note: not an MLP-specific field)	Is the Outreach Active (aka open) or Inactive (aka closed)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	n/a	Yes <input type="checkbox"/>	No <input type="checkbox"/>			

Name of Field or Block	Description	Want to Use this Field or Block?	Associated Lookup (see Checklist #3)	Want the Field/Block Required on Intake?	What Order Do You Want the Field/Block In? (Write in Order below)	Want a Default Value for Intake?	Misc. Options (circle if yes)
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If you want to create & add site-specific MLP fields, add them here

Name of Site-Specific Field	Description	Want to Use this Field or Block?		Associated Lookup	Want the Site-Specific Field Required on Intake?		What Order Do You Want the Field/Block In? (Write in Numerical Order below)	Want a Default Value for Intake?	Misc. Options
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	
		Yes <input type="checkbox"/>	No <input type="checkbox"/>		Yes <input type="checkbox"/>	No <input type="checkbox"/>		No default <input type="checkbox"/> Yes default <input type="checkbox"/> List the <u>one</u> value you would like to be the default) -----	

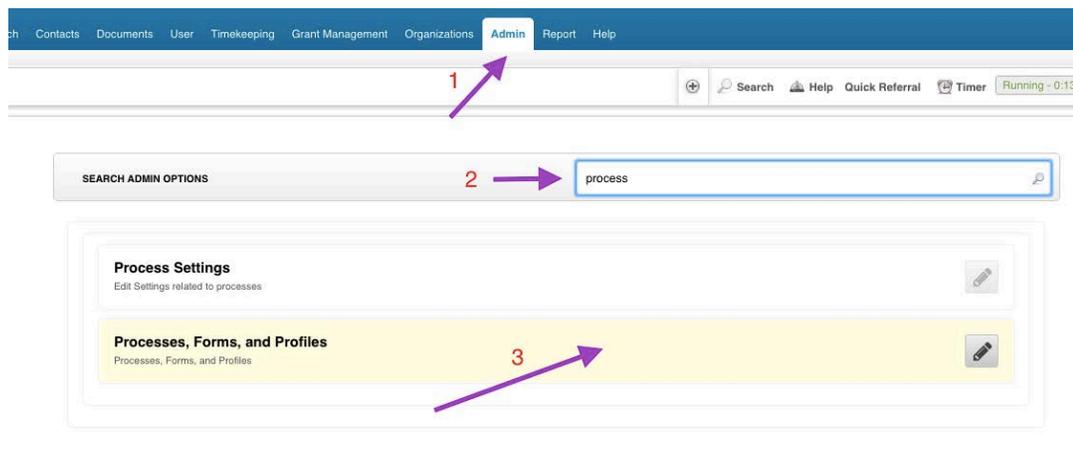
MLP-Legal Server Instruction Sheet #1: Adding MLP Institutions & Sites via Organizations

(For Use with Checklist #1)

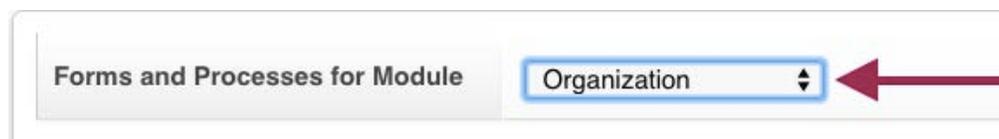
STEP ONE: Building a dynamic Organizations Profile (Start here if your organization is NOT currently using a dynamic Organizations Profile. *If your organization is already using a dynamic Organizations Profile, skip to [Page 98](#).*)

Note: Step One is not hard but there are a lot of steps.

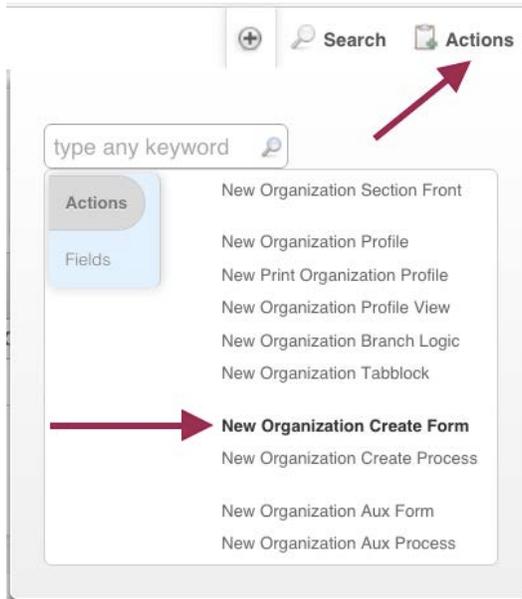
1. Click on the Admin tab at the top of any LegalServer page.
2. Type in “process” in the Search Admin Options box.
3. Click anywhere on “Processes, Forms, and Profiles.”



4. In Forms and Processes for Module, select Organization.



5. From the Actions menu, select New Organization Create Form.



6. Give your form a name (such as Organization Information), label your continue button (such as Save Organization), mark your form active and add the continue button, and make sure that the process type is listed as both Organization Aux and Organization Create.

A screenshot of the "Organization Create Form" configuration page. The page has a title "Organization Create Form" and a section "Name And Description". The "Name" field is labeled "Name*" and contains the text "Organization Information", with a red arrow pointing to it. The "Description" field is empty. The "Continue Button Text" field is labeled "Continue Button Text" and contains the text "Save Organization >", with a red arrow pointing to it. The "Skip This Form When Generating Process As PDF?" section has two radio buttons: "Yes" (unselected) and "No" (selected). The "Active*" section has two radio buttons: "Yes" (selected) and "No" (unselected), with a red arrow pointing to the "Yes" button. The "Add Continue Button*" section has two radio buttons: "Yes" (selected) and "No" (unselected), with a red arrow pointing to the "Yes" button. The "Process Types*" section has a list of options: "Organization Aux", "Organization Create", and "Organization Tabblock". The "Organization Aux" and "Organization Create" options are selected, with a red arrow pointing to the "Organization Create" option. Below the list, there is a note: "Hold down the control key (CTRL) to select more than one option."

- In the Form Elements section, add whichever fields, etc. you would like. Below is a sample.

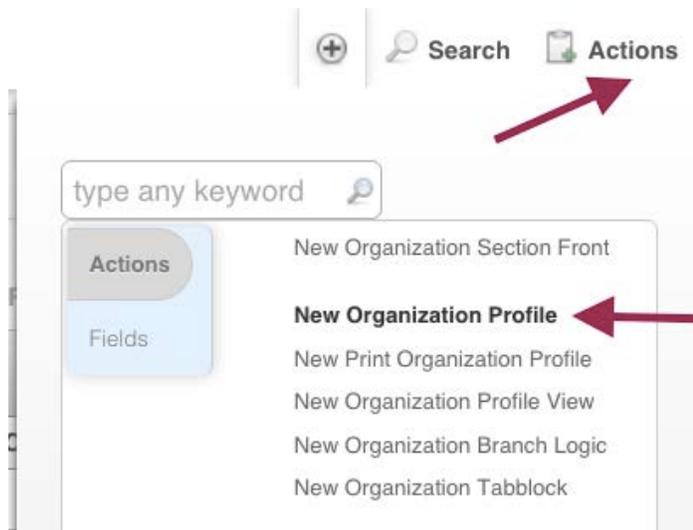
The screenshot shows the 'Form Elements' configuration window. On the left, there is a large empty area labeled 'Enabled'. On the right, the configuration for a 'Field: Active' element is shown. The 'Value' radio button is selected, with 'Yes' and 'No' options. Below this, the 'Toggle style' is set to 'Dropdown Menu'. There are several checkboxes: 'Default Overrides Existing Value' (unchecked), 'Right of last' (unchecked), 'Required' (checked), 'Bold' (unchecked), 'Hidden' (unchecked), and 'Read-Only' (unchecked). Below these, there is a section for 'Field: Organization Name' with an instruction: 'Select multiple Organizational Types by holding down the shift key for multi-select.
'. There are checkboxes for 'Should these instructions be a specific number of lines tall?' (unchecked), 'Show these instructions inline' (checked), 'Show these instructions when hovered over' (unchecked), 'Use Large Text (for Hover)' (unchecked), 'Show line breaks' (unchecked), and 'Format as HTML' (checked). A 'Label Text' input field is at the bottom.

The screenshot shows the 'Form Elements' configuration window with a list of fields and blocks. The list includes: 'Field: Organizational Type(s)', 'Block: Parent Organization', 'Header: Organization Address', 'Instruction: The Primary Add ... ts/people.' (with a text area containing 'The Primary Address for the organization is what will be associated by default with any affiliated contacts/people.
'), 'Block: Primary Address', 'Field: Phone', 'Field: Website Address', 'Field: Fax', 'Field: Referral Contact Name', 'Field: Referral Contact Phone', 'Field: Referral Contact Email', 'Field: Referral Office Location', 'Field: Description', 'Field: Date Org Entered', and 'Block: MLP Organization Departments' (with a sub-section 'Configure Organization Department Block' and a 'Max Departments' input field set to '20'). At the bottom, there is a URL: '2Fmanage_processes%2F%3Fprocess_type%3Dorganization%26force_page%3Dlist_form#'

- Click Continue.

Continue »

9. From the Actions menu, choose New Organization Profile.



10. Give your profile a name (such as Organizations Profile) and make it active.

A screenshot of a web form titled "Organization Profile". The form has a section header "Name And Description" with a dropdown arrow. Below this are several fields: "Name*" with a text input containing "Organizations Profile" and a red arrow pointing to it; "Description" with an empty text input; "Continue Button Text" with an empty text input; "Active*" with two radio buttons, "Yes" (selected) and "No", and a red arrow pointing to the "No" radio button; and "Configuration Notes" with a large empty text area.

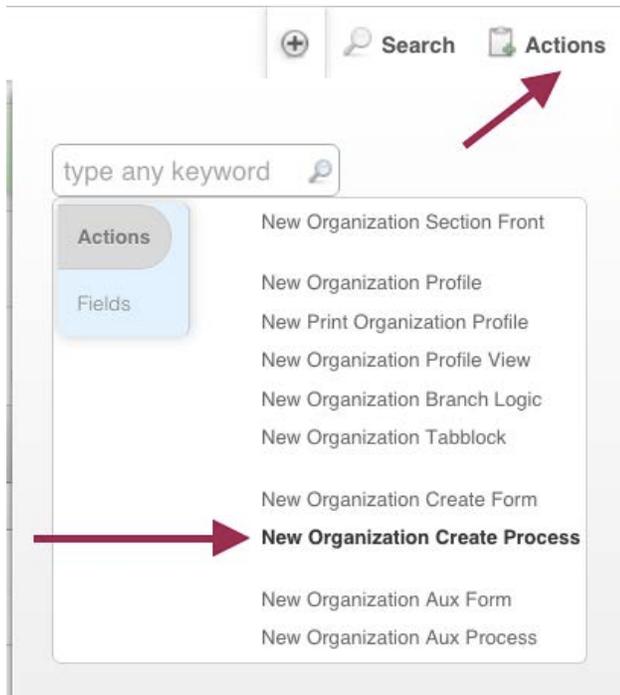
11. In the Form Elements section, add the following. (Note that you will not be able to customize the Tab Blocks yet.)

A screenshot of a web form showing a section titled "Form Elements" with a dropdown arrow. Below the title is a table with two columns: "Enabled" and a list of elements. The "Enabled" column is empty. The list of elements includes: "Header: Organizations Profile", "Field: Organization Name", "Field: Date Org Entered", and three "Tab Block:" entries.

12. Click continue. (You'll be coming back to the Profile to make additional edits later on.)

Continue »

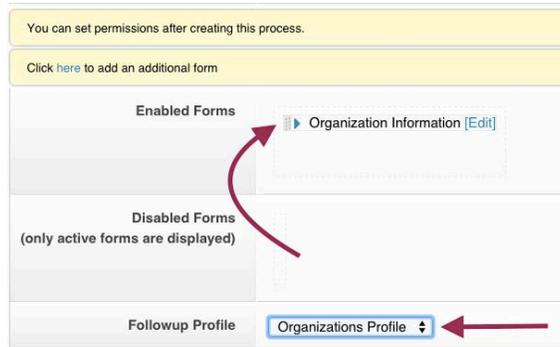
13. From the Actions menu, choose New Organization Create Process.



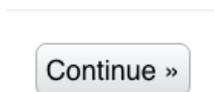
14. Name your process Add New Organization, and mark yes for Complete, Active, and Show Process Link in Module Static Profile.

Organization Create	
▼ Attributes	
Name *	Add New Organization
Complete	<input checked="" type="radio"/> Yes <input type="radio"/> No
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show on Quickbar	<input type="radio"/> Yes <input checked="" type="radio"/> No
Show Process Link in Module Static Profile	<input checked="" type="radio"/> Yes <input type="radio"/> No
Process Description	<input type="text"/>

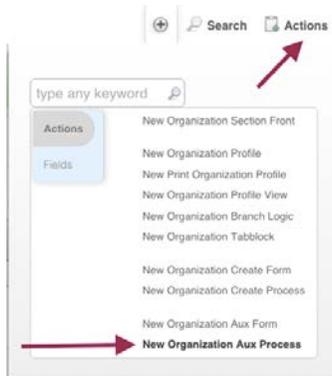
15. Your Organization Information form should appear in the Disabled Forms section. Grab it by the gray bar to the left of the blue triangle, and drag it up to the Enabled Forms section. Then, for Followup Profile, choose your Organizations Profile.



16. Click Continue.



17. From the Actions menu, choose New Organization Aux Process.



18. Name your process Edit Organizations, and mark it complete and active.

Process

▼ Attributes

Name *	<input type="text" value="Edit Organization"/>
Complete	<input checked="" type="radio"/> Yes <input type="radio"/> No
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Process Link in Module Static Profile	<input type="radio"/> Yes <input type="radio"/> No
Process Description	<input type="text"/>

19. Your Organization Information form should appear in the Disabled Forms section. Grab it by the gray bar to the left of the blue triangle, and drag it up to the Enabled Forms section. Leave the follow-up Profile as Main Profile.

You can set permissions after creating this process.

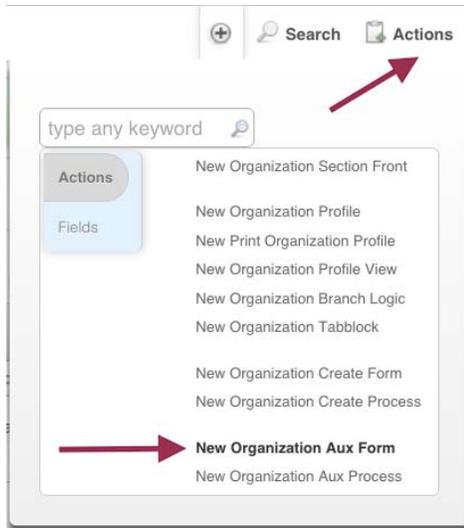
Click [here](#) to add an additional form

Enabled Forms	<input type="text" value="Organization Information [Edit]"/>
Disabled Forms (only active forms are displayed)	<input type="text"/>
Followup Profile	<input type="text" value="Main Profile"/>

20. Click Continue.

Continue »

21. From the Actions menu, choose New Organization Aux Form.



22. Name your Aux form Medical Institution Departments, mark it active, add a continue button, and make sure that Organization Aux is selected under Process Types.

Organization Aux Form

▼ Name And Description

Name* Medical Institution Depar ←

Description

Continue Button Text

Skip This Form When Generating Process As PDF? Yes No

Active* Yes No ←

Add Continue Button* Yes No ←

Process Types*
Hold down the control key (CTRL) to select more than one option.

- Organization Aux ←
- Organization Create
- Organization Tabblock

23. In Form Elements, add the header and block below. Choose whatever number of “Max Departments” you’d like.

▼ Form Elements

Enabled ←

▼ Header:

Text Medical Institution Departments

Contains HTML Yes

Help Hover

Help Expanded

Special Formatting Special (Do Not Remove)

▼ Block: MLP Organization Departments

Configure Organization Department Block

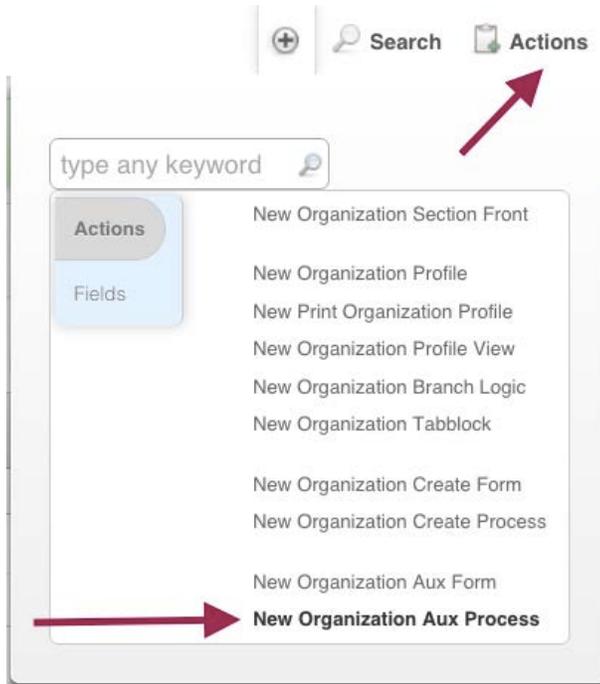
Max Departments 20

Configuration Notes

24. Click Continue.

Continue »

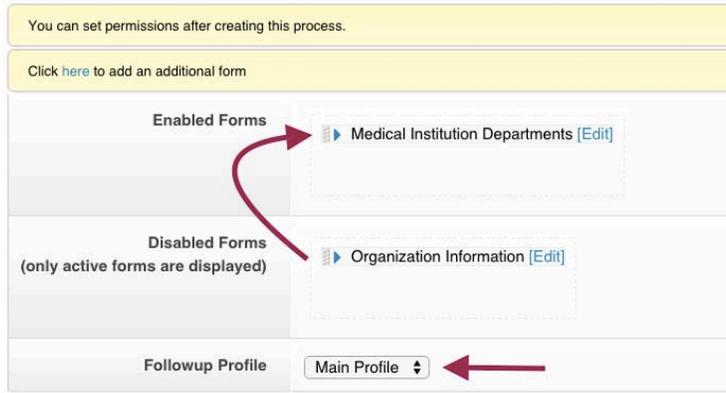
25. From the Actions menu, choose New Organization Aux Process.



26. Name your process Medical Institution Department, and make it complete and active.

Organization Aux	
▼ Attributes	
Name *	Medical Institution Depar ←
Complete	<input checked="" type="radio"/> Yes <input type="radio"/> No ←
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No ←
Show Process Link in Module Static Profile	<input type="radio"/> Yes <input checked="" type="radio"/> No ←
Process Description	<input type="text"/>

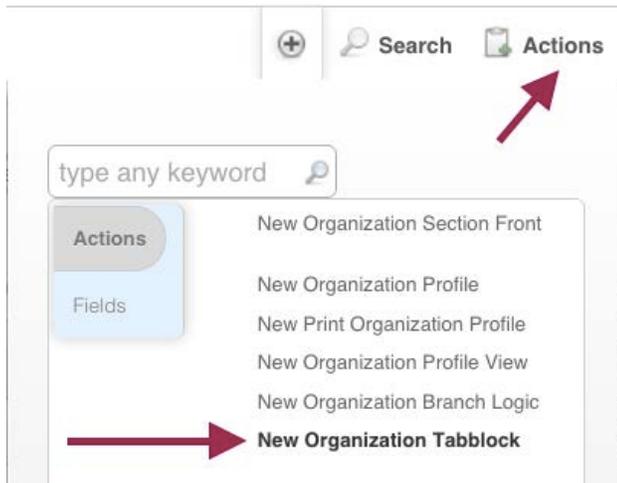
27. Move your Medical Institution Department form from the Disabled Forms to the Enabled Forms section. Be sure to grab it by the gray bar to the left of the blue triangle. Keep the Main Profile as the followup profile.



28. Click continue.



29. From the Actions menu, choose New Organization Tabblock.

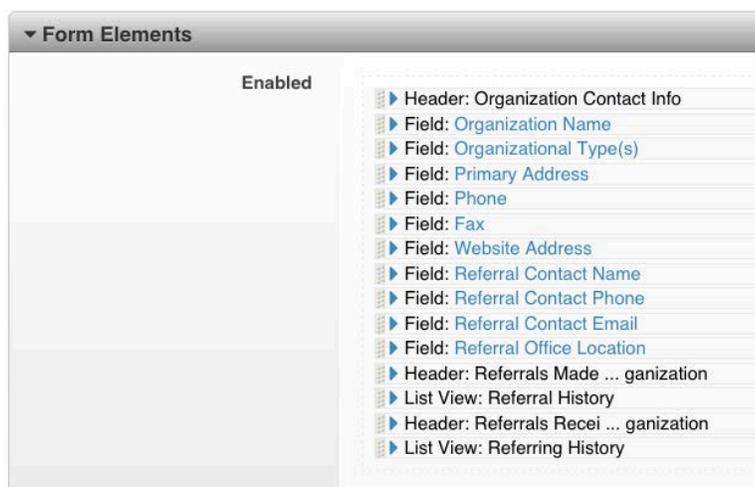


30. Name your Tab Block something like “Organization Contact Info,” make it Active, with NO continue button, and NO to half width.



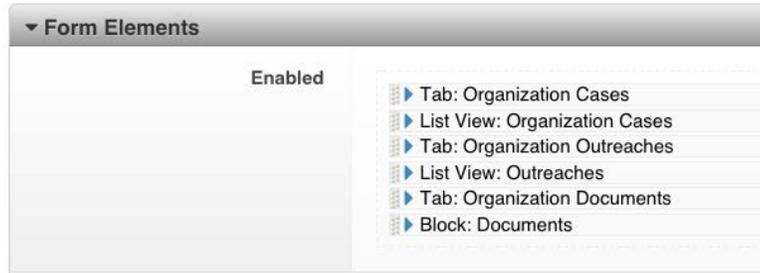
Organization Tabblock	
▼ Name And Description	
Name *	Organization Contact Info ←
Description	
Continue Button Text	
Skip This Form When Generating Process As PDF?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active *	<input checked="" type="radio"/> Yes <input type="radio"/> No ←
Add Continue Button *	<input type="radio"/> Yes <input checked="" type="radio"/> No ←
Configuration Notes	
Half Width *	<input type="radio"/> Yes <input checked="" type="radio"/> No ←

31. For the Form Elements, add basic contact information. See below for a sample of what you might build:



▼ Form Elements	
Enabled	
	▶ Header: Organization Contact Info
	▶ Field: Organization Name
	▶ Field: Organizational Type(s)
	▶ Field: Primary Address
	▶ Field: Phone
	▶ Field: Fax
	▶ Field: Website Address
	▶ Field: Referral Contact Name
	▶ Field: Referral Contact Phone
	▶ Field: Referral Contact Email
	▶ Field: Referral Office Location
	▶ Header: Referrals Made ... organization
	▶ List View: Referral History
	▶ Header: Referrals Recei ... organization
	▶ List View: Referring History

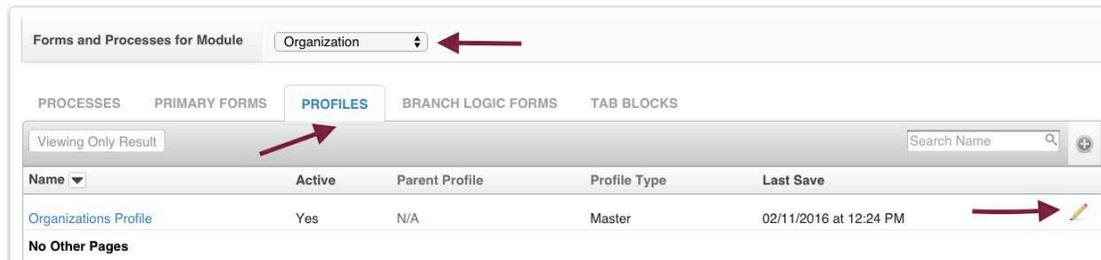
32. If you wish, create a second Tab Block titled something like “Additional Organization Information.” Here is a sample of what you might add to the Form Elements section:



33. Create a final Tab Block specific to MLP titled something like “MLP Organization Information.”



34. Go back to edit your Organizations Profile.



35. In the Form Elements section, you should now be able to customize your Tab Blocks.



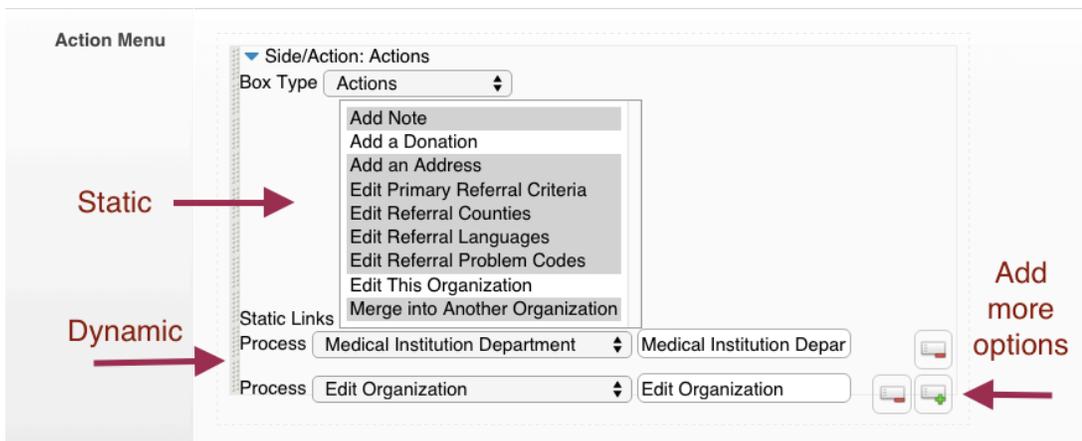
36. In the Side/Actions Elements section, add an Actions box to the Action Menu.



37. Be sure to move it from the Side Bar to the Action Menu.



38. Add whichever Actions you'd like from the static menu. Then, be sure to add Medical Institution Department from the dynamic options. Here is a sample:



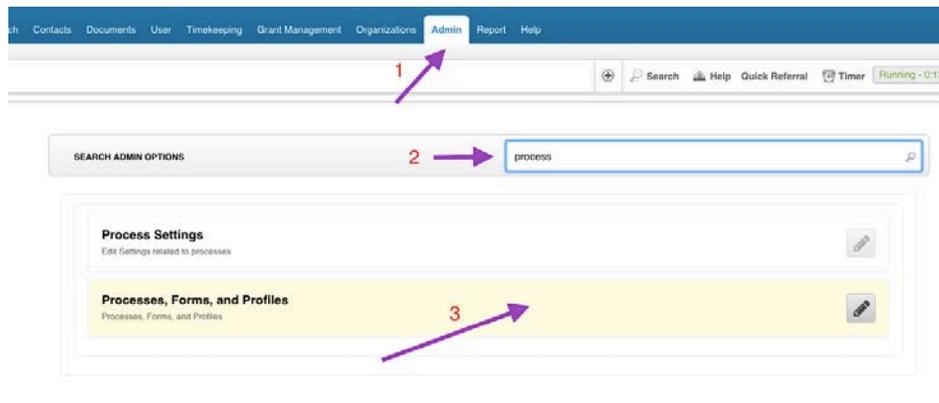
39. Click Continue.

Continue »

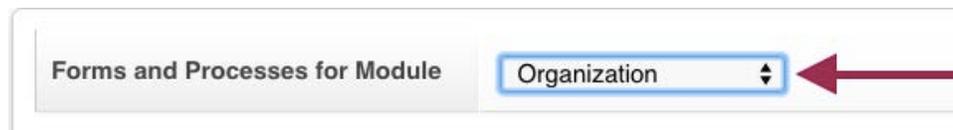
40. You are done with Step One. Skip to [Page 104](#) for STEP TWO of these Instructions.

STEP ONE: Adding MLP Customization to your dynamic Organizations Profile (Start here if your organization IS currently using a dynamic Organizations Profile)

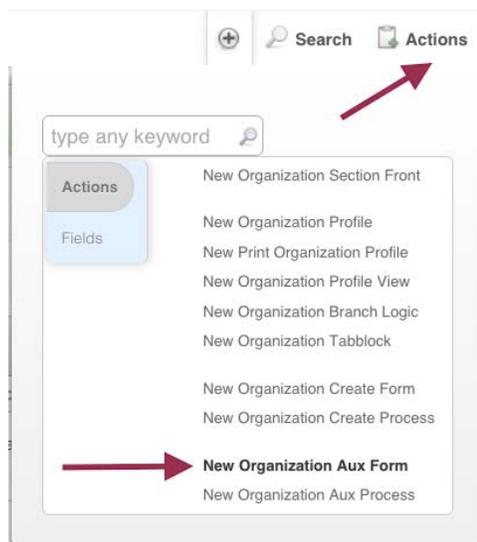
1. Click on the Admin tab at the top of any LegalServer page.
2. Type in “process” in the Search Admin Options box.
3. Click anywhere on “Processes, Forms, and Profiles.”



4. In Forms and Processes for Module, select Organization.



4. From the Actions menu, choose New Organization Aux Form.



- Name your Aux form Medical Institution Departments, mark it active, add a continue button, and make sure that Organization Aux is selected under Process Types.

Organization Aux Form

▼ Name And Description

Name* ←

Description

Continue Button Text

Skip This Form When Generating Process As PDF? Yes No

Active* Yes No ←

Add Continue Button* Yes No ←

Process Types*
Hold down the control key (CTRL) to select more than one option.

Organization Aux ←
 Organization Create
 Organization Tabblock

- In Form Elements, add the header and block below:

▼ Form Elements

Enabled →

▼ Header:

Text

Contains HTML

Help Hover

Help Expanded

Special Formatting

▼ Block: MLP Organization Departments

Configure Organization Department Block

Max Departments

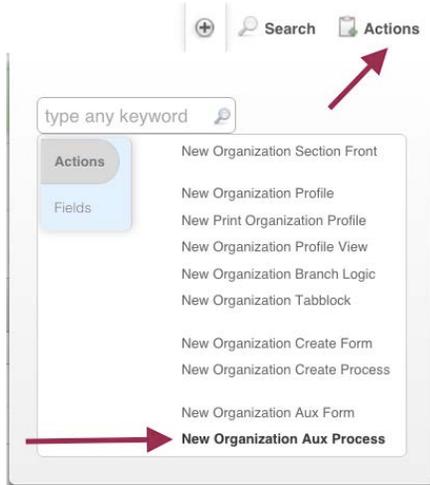
Configuration Notes

→

- Click Continue.

Continue »

8. From the Actions menu, choose New Organization Aux Process.



9. Name your process Medical Institution Department, and make it Complete and Active.

A screenshot of a form titled "Organization Aux". Under the "Attributes" section, there are several fields: "Name*" with the value "Medical Institution Depar" and a red arrow pointing to it; "Complete" with radio buttons for "Yes" (selected) and "No", and a red arrow pointing to the "No" button; "Active" with radio buttons for "Yes" (selected) and "No", and a red arrow pointing to the "No" button; "Show Process Link in Module Static Profile" with radio buttons for "Yes" and "No" (selected), and a red arrow pointing to the "No" button; and "Process Description" with an empty text box.

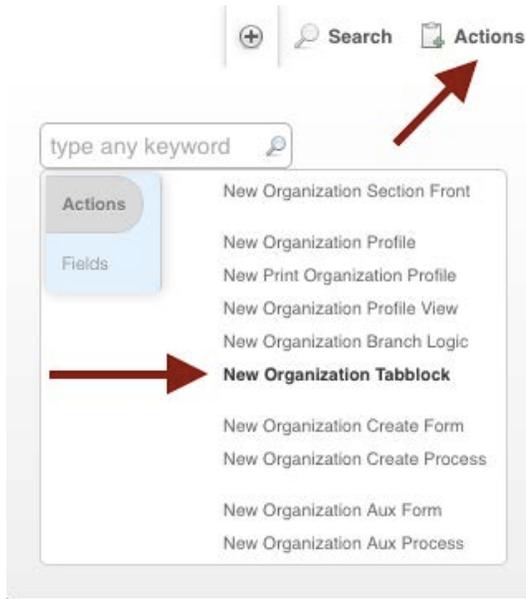
10. Move your Medical Institutional Department form from the Disabled Forms to the Enabled Forms section. Be sure to grab it by the gray bar to the left of the blue triangle. Keep the Main Profile as the followup profile.

A screenshot of a form management interface. At the top, there is a yellow banner that says "You can set permissions after creating this process." Below that is another yellow banner that says "Click [here](#) to add an additional form". The main area is divided into two sections: "Enabled Forms" and "Disabled Forms (only active forms are displayed)". In the "Enabled Forms" section, there is a card for "Medical Institution Departments [Edit]" with a blue triangle on its left side. A red arrow points from this card to the "Enabled Forms" section header. In the "Disabled Forms" section, there is a card for "Organization Information [Edit]" with a blue triangle on its left side. A red arrow points from this card to the "Disabled Forms" section header. At the bottom, there is a "Followup Profile" dropdown menu with "Main Profile" selected and a red arrow pointing to it.

11. Click continue.

Continue »

12. From the Actions menu, choose New Organization Tabblock.



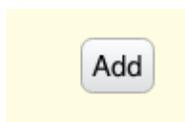
13. Title the new tabblock something like “MLP Organizations Tab Block.” Mark it Active and choose NO for Add Continue Button and Half Width.

Organization Tabblock	
▼ Name And Description	
Name *	MLP Organizations Tab ←
Description	<input type="text"/>
Continue Button Text	<input type="text"/>
Skip This Form When Generating Process As PDF?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active *	<input checked="" type="radio"/> Yes <input type="radio"/> No ←
Add Continue Button *	<input type="radio"/> Yes <input checked="" type="radio"/> No ←
Configuration Notes	<input type="text"/>
Half Width *	<input type="radio"/> Yes <input checked="" type="radio"/> No ←

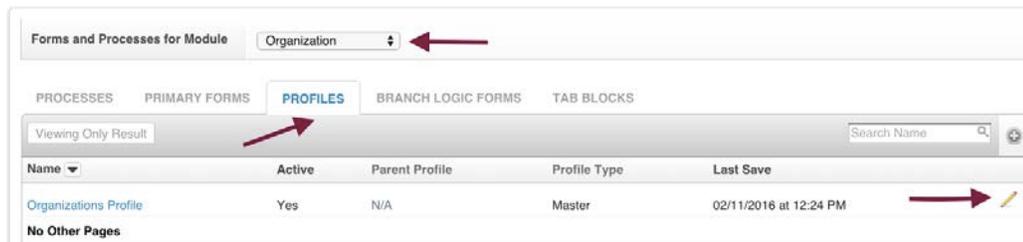
14. In the Form Elements Section, add the following:



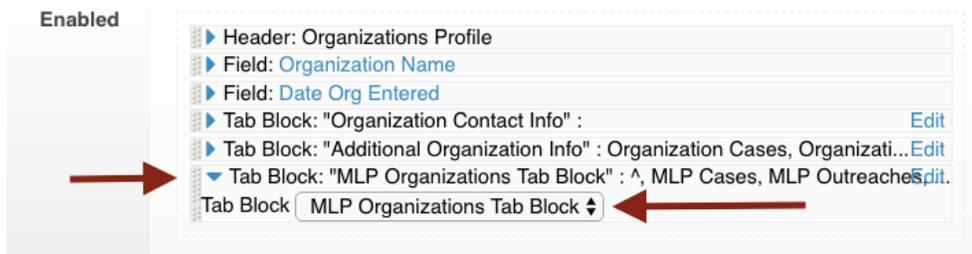
15. Click Add.



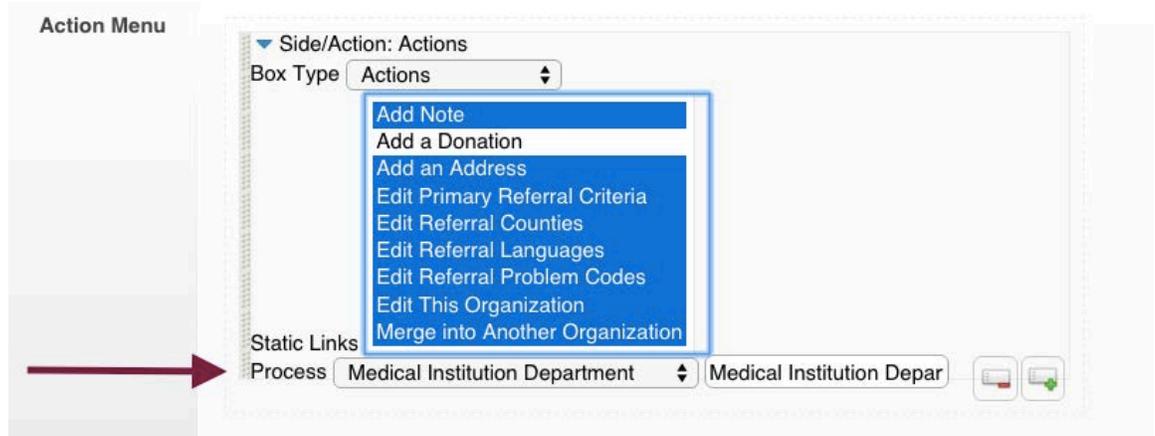
16. From the Processes, Forms & Profiles page, click on the pencil icon next to your Organizations Profile



17. In the Form Elements section, add the MLP Organizations Tab Block.



18. In the Actions section, add “Medical Institution Department” to the list of available Actions.



19. Click Continue.

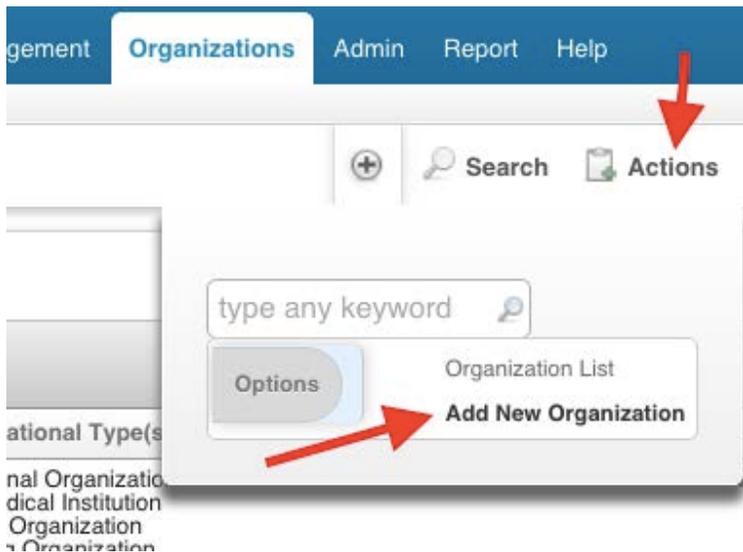


STEP TWO (If your MLP Medical Partner is not already added as an Organization in LegalServer. If your MLP Medical Partner is already added as an Organization in LegalServer, go to [Page 106](#).)

1. Click on the Organizations Tab at the top of LegalServer.



2. Hover over Actions, then click on Add New Organization



3. Next to Organization Name, type in the name of your MLP Medical Institution. This should be the name of the umbrella health organization, not the name of the specific department or location.

Organization Information	
Active *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Organization Name *	<input type="text" value="Metro General Medical Center"/>

4. For Organization Type, choose MLP Medical Institution.

Select multiple Organizational Types by holding down the shift key for multi-select.
To enable incoming and outgoing case referrals from and to this organization, select the Types "Referring Organization" and

Organizational Type(s)*
Hold down the control key (CTRL) to select more than one option.

- Foster Care / Kinship Care
- IHPS
- Institutional Organization
- Law Firm
- Medical Facility
- MLP Medical Institution**
- Referral Organization
- Referring Organization
- School
- Social Security Office

(You may also want to choose additional options.)

Organizational Type(s)*
Hold down the control key (CTRL) to select more than one option.

- Foster Care / Kinship Care
- IHPS
- Institutional Organization
- Law Firm
- Medical Facility
- MLP Medical Institution**
- Referral Organization**
- Referring Organization**
- School
- Social Security Office

5. Enter address and other contact information.

Primary Address

Street Address

Street Address (Additional)

City, State, Zip

County Inside Service Area Outside Service Area Outside State

Phone

Alternate Phone

Referral Contact Email

Fax

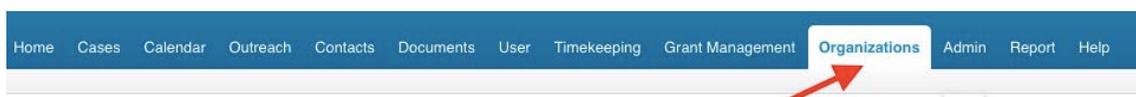
Website Address

Referral Office Location

6. Click on Save Organization. Skip to [Page 108](#) for **STEP THREE** of these Instructions.

STEP TWO (if your MLP Medical Partner is already listed as an organization in LegalServer)

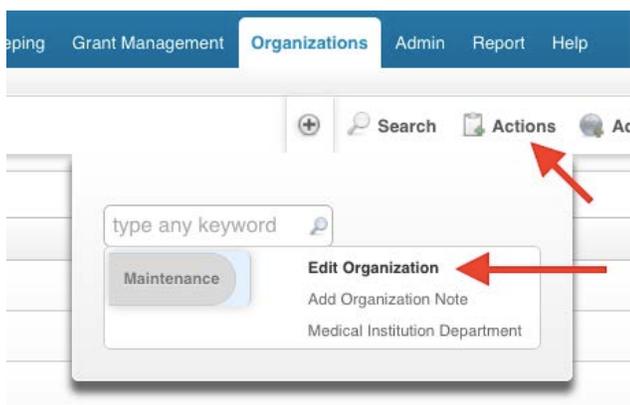
1. Notify LegalServer via support@legalserver.org that you would like to have all of your organizations updated to the new dynamic Organizations Profile as part of the MLP Pilot. (This will probably take them a day or two.) Once they have updated your organizations, move on to #2 below.
2. Click on the Organizations Tab at the top of LegalServer.



3. Click on the name of your MLP Medical Partner.



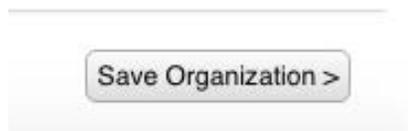
4. Hover over Actions, then click on Edit Organization.



5. In addition to whatever Organization Types have already been selected, choose MLP Medical Institution.



6. Click on Save Organization.



7. Move on to **STEP THREE**.

STEP THREE (Adding MLP Medical Departments and Sites)

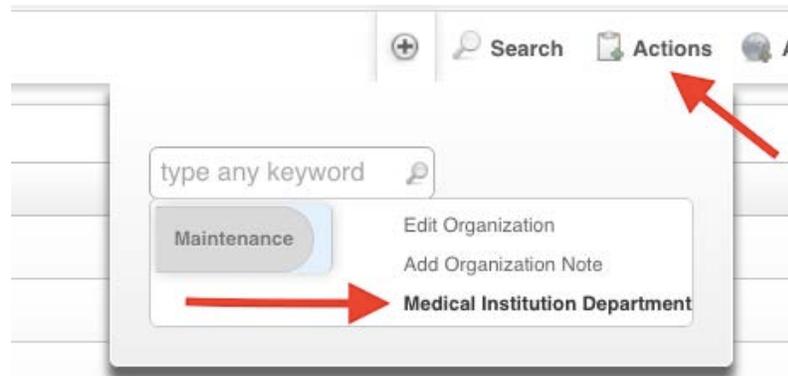
1. Click on the Organizations Tab at the top of LegalServer.



2. Click on the name of your MLP Medical Partner.



3. Hover over Actions, then click on Medical Institution Department.



4. Add as many departments or locations as you wish. For example, you might want to add the names of each department from which you accept referrals and/or add the names of each community health center from which you accept referrals.

In the first box, add the name of the department or location. In the second, add the phone number. In the third, add the address or click in the box to use the main institution's address.

Medical Institution Departments			
Departments			
Name	Phone	Address	Use Institution's address?'
MGMC - Pediatrics	216-555-1212	<input type="text"/>	<input checked="" type="checkbox"/>
MGMC - Family Medicir	216-555-1234	<input type="text"/>	<input checked="" type="checkbox"/>
Community Health Cen	216-555-5678	1234 Main Street, Busy	<input type="checkbox"/>

To add additional entries, click on the green plus sign.

The image shows a close-up of the form's input fields. The top field contains the text "6th Street, C" and has a small grey square icon to its right. Below it is another empty input field with a similar grey square icon. To the right of the second field are two icons: a red minus sign and a green plus sign. A green arrow points from the top right of the first field down to the green plus sign icon.

5. Click on Continue

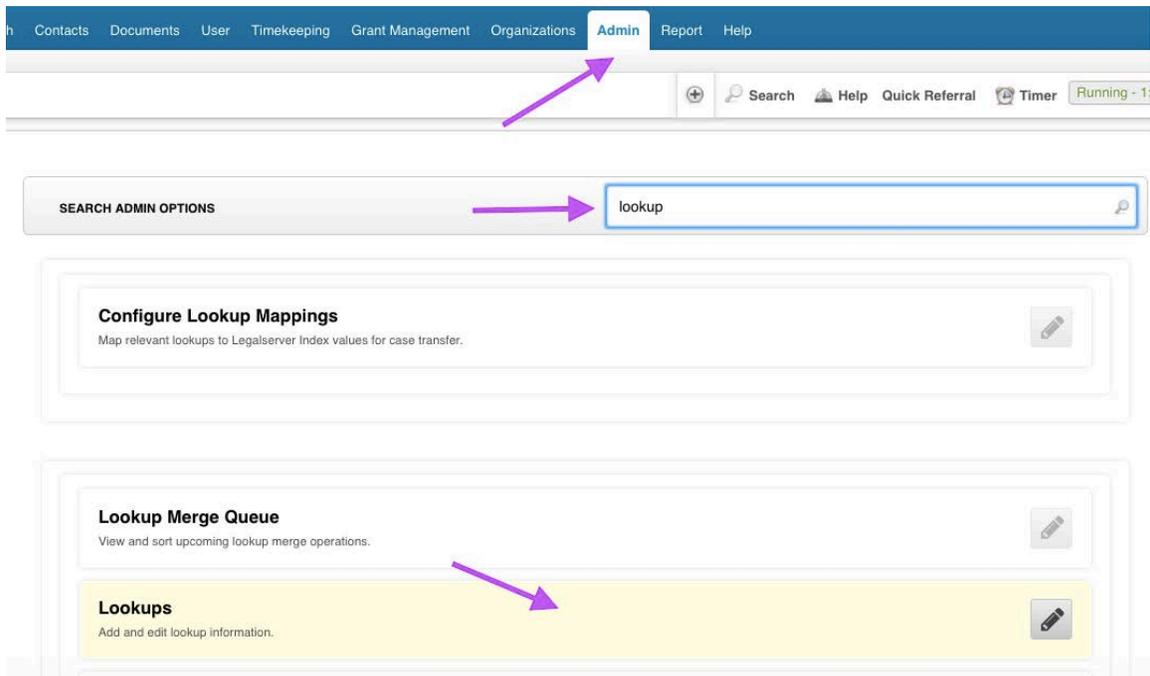


6. You're done! Congratulations!

MLP-Legal Server Instruction Sheet #2: Adding MLP Medical Providers as Contacts (For Use with Checklist #2)

STEP ONE: Adding “MLP Medical Provider” as a Contact Type.

1. Click on the Admin tab, type “lookup” into Search Admin Options, and then click anywhere on Lookups.



2. Type “contact types” into the search bar, and then click on Contact Types.



3. Add the option “MLP Medical Provider”

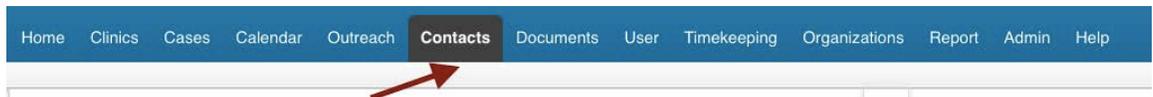
Contact Types	
Lookup	
Name *	<input type="text" value="MLP Medical Provider"/>
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
List order	<input type="text"/>

4. Click Continue.

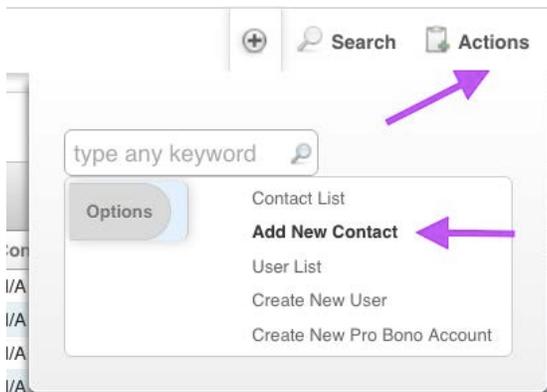
Continue »

STEP TWO: Adding an MLP Medical Provider as a Contact

1. Click on the Contacts tab at the top of any LegalServer page.



2. From the Actions menu, choose Add New Contact.



3. Make the contact active, add the name, and choose MLP Medical Provider from the list of Contact Types. (You may also choose additional types if you wish.)

Contact Profile

Contact Active* Yes No ←

Name (First*, MI, Last*) Megan Middle Sandel MD ←

Search

Preferred Donation Name

Salutation

Contact Types
Hold down the control key (CTRL) to select more than one option.

- Elected Official -- State of New York
- Emergency Contact
- Funding Code
- Judge
- Landlord
- MLP Medical Provider ←
- Opposing Counsel
- Potential Donor
- Pro Bono Attorney
- Vendor
- Volunteer

4. Choose “yes” to bind the work address to Organization (you’ll do more with the Organization later), list the work address as the preferred address, and enter phone number and email.

Bind Work Address to Organization* Yes ↓ ←

No Organization affiliation

Preferred Address Work ↓ ←

Is it okay to send mail? Yes No

Home Phone Home Phone Note: Home Phone Note

Work Phone 216-555-1212 Note: Work Phone Note ←

Mobile Phone Mobile Phone Note: Mobile Phone Note

Fax Fax Note: Fax Note

Other Phone Other Phone Note: Other Phone Note

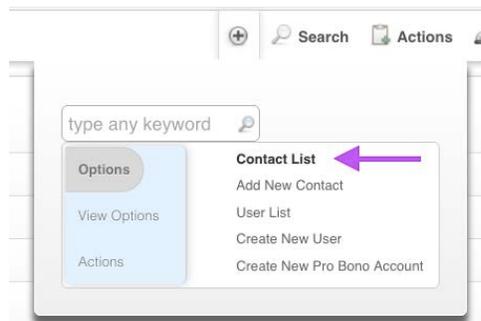
Email msandel@hospital.org ←

5. Click continue.

Continue »

STEP THREE: Affiliating MLP Medical Provider with an Organization

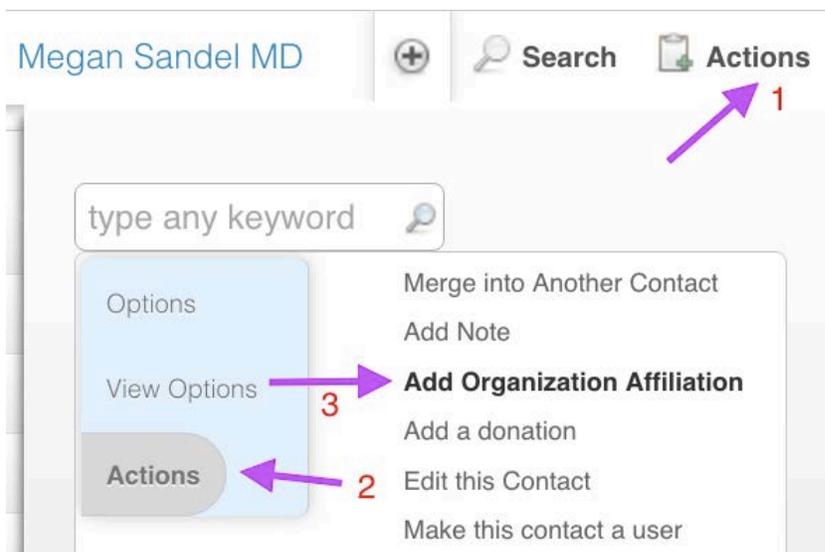
1. From the Contacts tab, hover over Actions and then click on Contacts List.



2. Find the name of your contact, and click on her name.

Sandel MD, Megan	msandel@hospital.org	MLP Medical Provider	N/A
------------------	----------------------	----------------------	-----

3. From the Actions menu, click on Actions in the light blue section, and then Add Organizational Affiliation.



- Choose the appropriate medical site for Organization.

Organization Affiliation

Organization*

Organization Affiliation

Organization*

Organization Position

- Meadow Park Rehabilitation and Health Care Center LLC
- Menorah Home & Hospital for Aged & Infirm
- Mental Hygiene Legal Services
- Mermaid Manor Home for Adults
- Methodist Home for Nursing and Rehabilitation
- Metro General Medical Center
- Metropolitan Corporate Counsel

- Click continue.

Continue »

- You're done! Your MLP Medical Provider is now affiliated with the appropriate medical site in LegalServer.

Contact Profile

Contact Active	Yes
Name	Megan Sandel MD
Preferred Donation Name	N/A
Salutation	N/A
Contact Types	MLP Medical Provider
Home Address	State: NY
Attention/Care Of	N/A
Bind Work Address to Organization	Yes
Work Organization	Metro General Medical Center
Work Address	1234 Busy Town Drive BusyTown, OH 43210

Name	Email	Contact Types	Work Organization
Sandel MD, Megan	msandel@hospital.org	MLP Medical Provider	Metro General Medical Center

7. She will now show up as an option when you are adding a Contact to a case or outreach.

Search by name for an existing Contact or use the button below to create a new Contact record MLP Medical Provider for this case

Create a new mlp medical provider contact

MLP Medical Provider
Search for contacts by name

Meg

Megan Sandel MD
(216) 555-1212

8. Repeat as needed for additional Contacts.

MLP-Legal Server

Instruction Sheet #3:

Customizing MLP Lookups

(For Use with Checklist #3)

Some notes to review prior to customization:

For the following system lookups, you can 1) de-activate options any you won't use, 2) add any options you need that are not listed, and 3) change the order in which the options appear in a drop-down or multi-select (for example, you can put those most frequently used at the top).

- MLP Medical Practice Area
 - List of medical specialties
 - Examples: Pediatrics, Psychiatry, Family Medicine
- MLP Referral Position Type
 - List of medical positions
 - Examples: physician, nurse practitioner, social worker
- MLP Attendee Position Type
 - List of medical positions for staff who attend MLP trainings
 - Examples: physician, nurse practitioner, social worker
- MLP Relationship of client to referred patient
 - List of possible relationships of client to the patient referred to the MLP
 - Example: Self (client is patient referred), Parent, Spouse
- MLP Patient SDOH Risk Categories
 - List of patient experiences/characteristics which may indicate increased vulnerability (SDOH = Social Determinants of Health)
 - Examples: history of homelessness, frequent absences from school

- MLP Outcome of Referral Rec'd from Health Care Site
 - List describing possibilities for what happened after a medical partner referred a patient to the MLP
 - Examples: Intake complete and case accepted; Intake complete but conflict of interest; No response / no contact from patient

- MLP Output for Health Care Partner
 - List describing the activities performed by legal staff on behalf of a referred patient.
 - Examples: Provided advice/brief service, Represented client in court, Represented client in administrative hearing

For the following lookups, you can 1) de-activate options any you won't use, and 2) change the order in which the options appear in a drop-down (for example, you can put most frequently used at the top). **You should not add new options.**

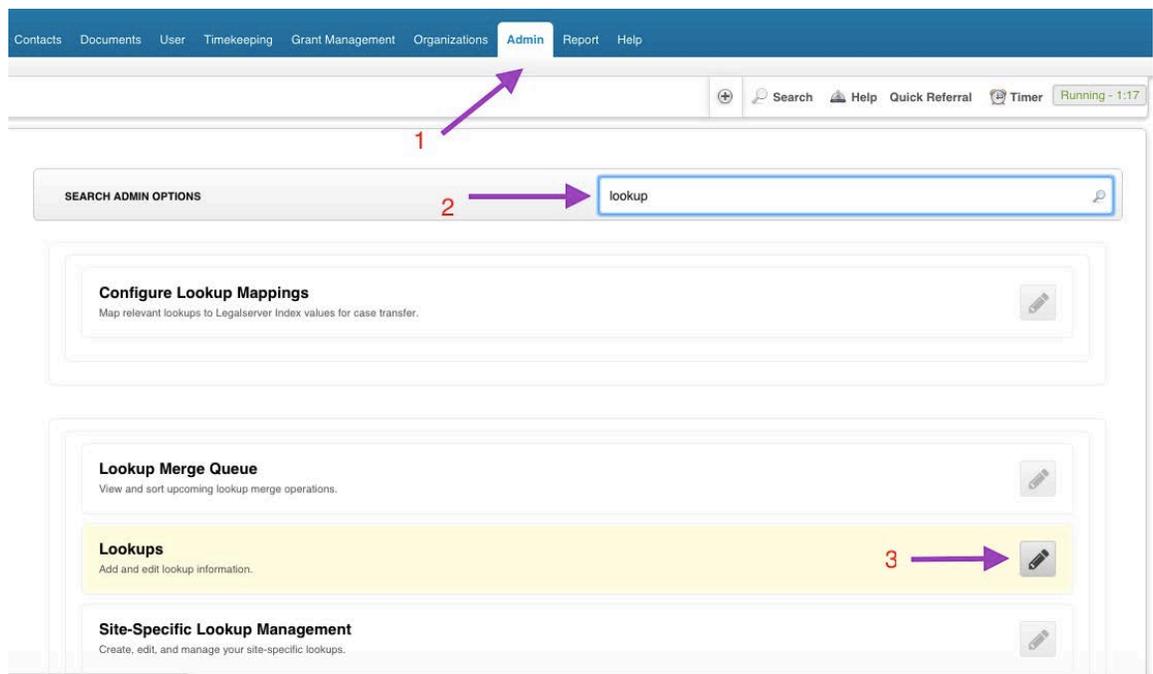
- MLP I-HELP Category
 - List of I-HELP categories used by MLP medical partners to categorize types of legal cases; analogous to legal problem categories
 - Options: Income & Insurance, Housing & Utilities, Education & Employment, Legal Status, Personal & Family Stability

- MLP Special Populations
 - List of patient populations that the National Center for Medical-Legal Partnership is asking sites to track.
 - Options: Child (under 18), Chronic Illness, Homeless /Unstably Housed, Older Adult (age 60+), Veteran

- ICD-10 Category, Block, Diagnosis/Code
 - ICD = International Statistical Classification of Diseases and Related Health Problems; used by medical and public health professions to track morbidity across populations.
 - ICD-10 Category = broad description of type of disease or health-related problem
 - ICD-10 Block = intermediate level description of type of health-related problem within a Category
 - ICD-10 Code/Diagnosis = specific description of type of health-related problem within a Block

To Edit Lookups in LegalServer:

1. Click on the Admin tab in LegalServer.
2. Type “lookup” into Search Admin Options.
3. Click anywhere on “Lookups.”



4. Type “mlp” into the search bar. All MLP lookups will appear:

Title	Modules Used In	Description
Mlp Attendee Position Type	outreach	N/A
Mlp Client Patient Relationship Type	matter	N/A
Mlp Icd10 Block	lookup	N/A
Mlp Icd10 Category	lookup	N/A
Mlp Icd10 Diagnosis	matter, outreach	N/A
Mlp Ihelp Category	matter, outreach	N/A
Mlp Medical Practice Area	matter, outreach	N/A
Mlp Outcome From Health Care Site	matter	N/A
Mlp Outcome of Facilitated Referral	matter, outreach	N/A
Mlp Output For Health Care Partner	matter	N/A
Mlp Patient Sdoh Risk Category	matter	N/A
Mlp Referral Position Type	matter, outreach	N/A
Mlp Special Population	matter, outreach	N/A

No Other Pages

5. To edit an existing lookup list, click on the lookup title.

Title
Mlp Attendee Position Type
Mlp Client Patient Relationship Type
Mlp Icd10 Block
Mlp Icd10 Category
Mlp Icd10 Diagnosis
Mlp Ihelp Category
Mlp Medical Practice Area
Mlp Outcome From Health Care Site
Mlp Outcome of Facilitated Referral
Mlp Output For Health Care Partner
Mlp Patient Sdoh Risk Category
Mlp Referral Position Type
Mlp Special Population

6. To edit an individual lookup value, click on the value.

Mlp Output For Health Care Partner

Lookup	
Name *	<input type="text"/>
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
List order	<input type="text"/>

MLP OUTPUT FOR HEALTH CARE PARTNER

all 12 results

Name ▾

- Accommodated patient need for home / hospital visit
- Appeared at administrative hearing on behalf of client
- Appeared in court on behalf of client
- Assisted client with preparation of administrative documents
- Assisted client with preparation of legal documents
- Attended IEP, disciplinary, or other educational meeting with student
- Lost case
- Patient Referred to Other Source of Support
- Placed client with free law school clinic
- Placed client with pro bono attorney
- Provided client with advice about legal problem ←
- Removed social or legal barrier to hospital discharge

7. You can then a) change the title, b) make the value inactive, and/or c) change the list order.

Mlp Output For Health Care Partner

Lookup	
Name *	Provided client with advice about legal problem
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
List order	8

- To add a new lookup value, type in the value and related information near the top of the page.

Mip Output For Health Care Partner

Lookup	
Name *	<input type="text"/>
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
List order	<input type="text"/>

Then click on Continue.

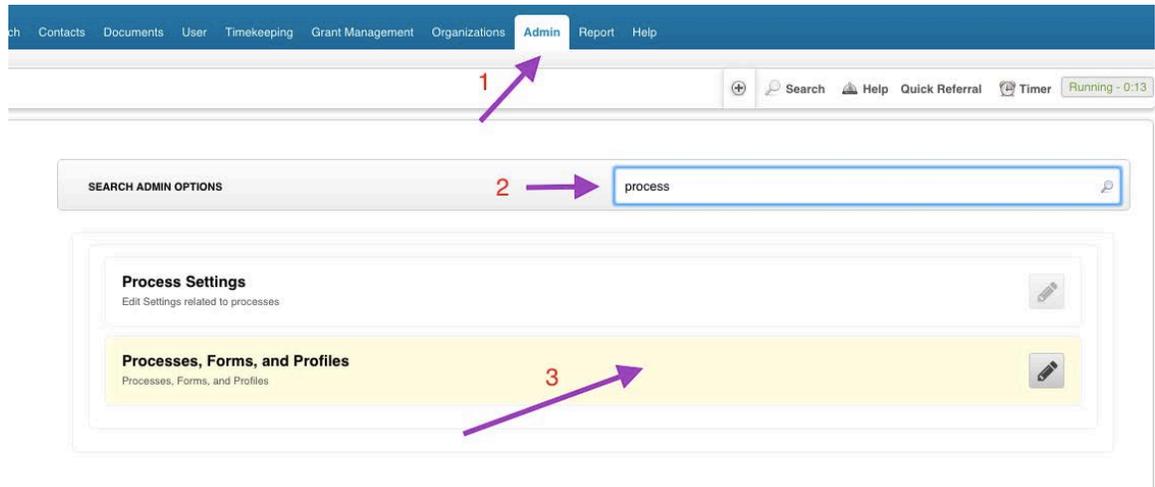


- You're done with editing lookups.

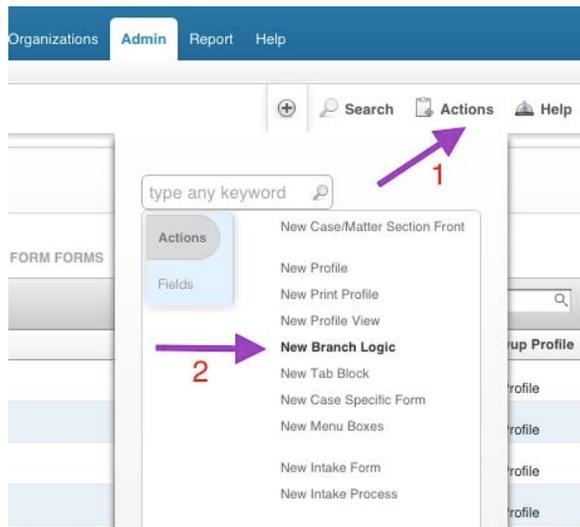
MLP-Legal Server Instruction Sheet #4: Building Branch Logic for MLP Intake (For Use with Checklist #4)

STEP ONE: Building the Branch Logic.

1. Click on the Admin tab at the top of any LegalServer page.
2. Type in “process” in the Search Admin Options box.
3. Click anywhere on “Processes, Forms, and Profiles.”



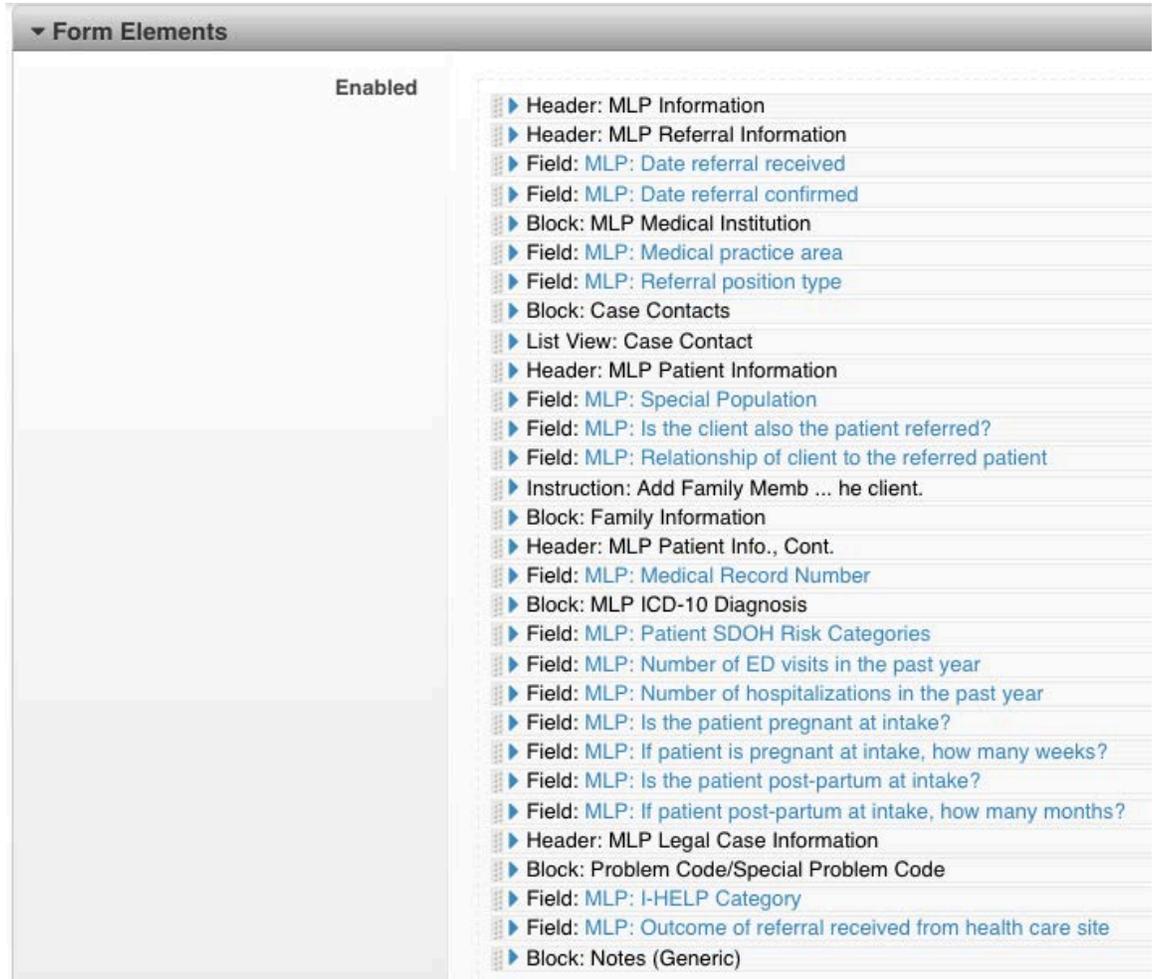
4. Hover over Actions, then click on New Branch Logic.



5. Name your Branch Logic something along the lines of “BL for MLP Intake.”
6. Add a description if you wish.
7. Make sure you mark the branch logic active.

Branch Logic	
▼ Name And Description	
Name *	<input type="text" value="BL for MLP Intake"/> ←
Description	<input type="text" value="branch logic for MLP intal"/> ←
Continue Button Text	<input type="text"/>
Skip This Form When Generating Process As PDF?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active *	<input checked="" type="radio"/> Yes <input type="radio"/> No ←
Add Continue Button *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Configuration Notes	<div style="border: 1px solid #ccc; height: 40px;"></div>

8. Under Form Elements, add all of the Headers, Fields, Blocks, and List Views that you would like to include in your intake that are specific to MLP cases. (See accompanying Checklist #4 to determine your MLP's selections.) Below is a sample.



9. Remember also that you are free to add existing non-MLP fields and/or create site-specific MLP fields.

10. A number of MLP-specific or -relevant Fields, Blocks, and List Views can be customized. See below #11 - #15 for more details.

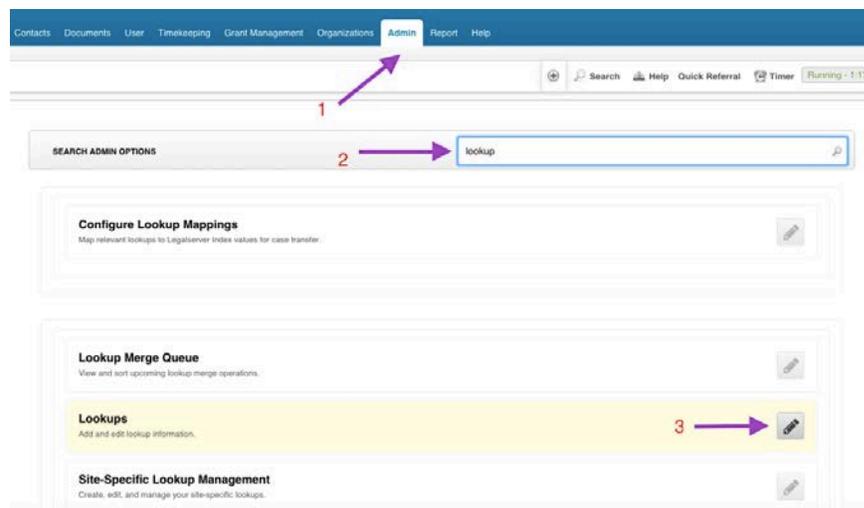
11. Special Instructions for the MLP Medical Institution block:

- a. You can choose to require MLP Medical Institution as well as MLP Medical Department / Site.
- b. You can also choose a default Medical Institution (**However, please note that this default is not currently functional. We hope it will be soon.**)
 - MLP Medical Institutions must be added via Organizations prior to choosing this default. (*See Instruction Sheet #1: Adding MLP Medical Institutions via Organizations.*)

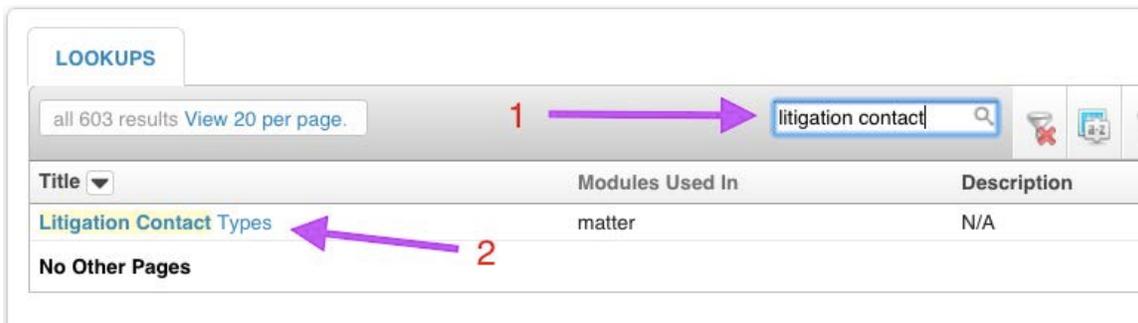


12. Special Instructions for the Case Contacts block. If you want to record the name of the individual medical staff person who made the referral, you will need to add an MLP Medical Provider option to the Case Contacts lookup. (*You'll also want to review Instruction Sheet #2, Adding MLP Medical Providers as Contacts.*)

- a. Click on Admin, then type "lookup" into the Admin Search Options, then click on Lookups.



- b. Type “litigation contact” into the search box, then click on Litigation Contact Types (ignore the fact that this says “litigation” – the case does not need to involve litigation to use this feature).



- c. Add “MLP Medical Provider”, and click on Continue.

The screenshot shows a 'Lookup' form with the following fields:

- Name***: A text input field containing 'MLP Medical Provider', highlighted in yellow with a purple arrow pointing to it.
- Outgoing LSIndex Type**: A dropdown menu with 'Please Select ...' selected.
- Active**: Radio buttons for 'Yes' (selected) and 'No'.
- List order**: An empty text input field.

 A 'Continue »' button is located at the bottom right of the form.

- d. Back on the Branch Logic page and the Family Information block, select “MLP Medical Provider” from the drop-down options for Contact Type.

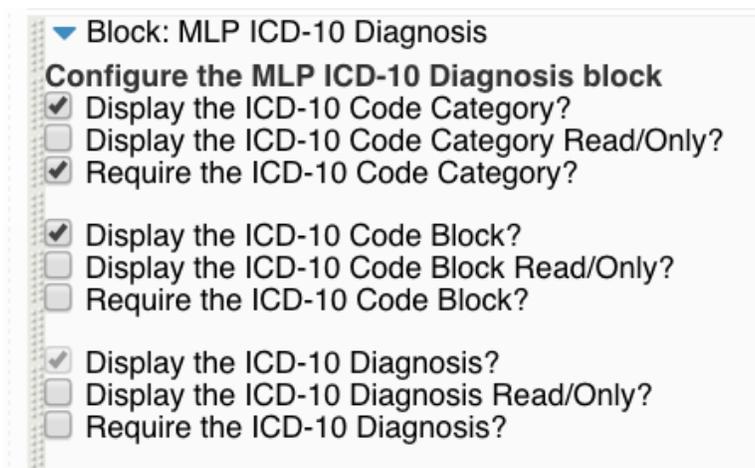
The screenshot shows a configuration page for a 'Block: Case Contacts'. It features a dropdown menu for 'Contact Type' with 'MLP Medical Provider' selected, indicated by a purple arrow. Below the dropdown is a 'Configuration Notes' text area.

13. Special Instructions for the Family Information block:

- a. If you want to add information about the MLP patient when the patient referred is NOT the client, you can use the Family Information block.
- b. The Family Information block has a lot of options for customization, including asking for DOB, race, SSN, address, etc.
- c. NOTE: we are working on a way to explicitly identify the MLP patient referred on the Family Information block. This may be relevant when multiple family/household members are added via this block but only one is the MLP patient referred

14. Special Instructions for the ICD-10 block:

- a. You can choose to display the ICD-10 Category, Block, and/or Diagnosis.
- b. You can choose to require the ICD-10 Category, Block, and/or Diagnosis.
- c. We recommend that you DO NOT check on “Display the ICD-10 Diagnosis Read/Only”
- d. Display the ICD-10 Diagnosis will automatically be checked.



▼ Block: MLP ICD-10 Diagnosis

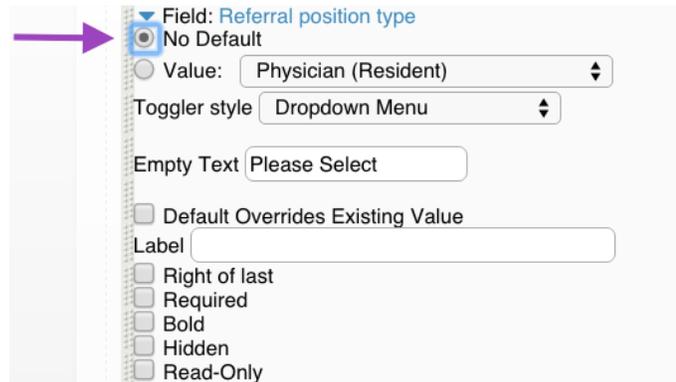
Configure the MLP ICD-10 Diagnosis block

- Display the ICD-10 Code Category?
- Display the ICD-10 Code Category Read/Only?
- Require the ICD-10 Code Category?
- Display the ICD-10 Code Block?
- Display the ICD-10 Code Block Read/Only?
- Require the ICD-10 Code Block?
- Display the ICD-10 Diagnosis?
- Display the ICD-10 Diagnosis Read/Only?
- Require the ICD-10 Diagnosis?

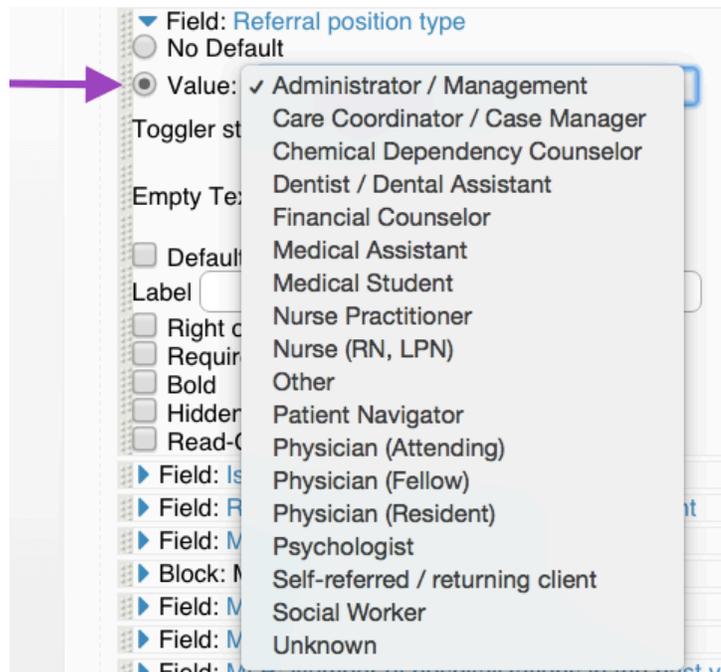
15. General reminders on customizing fields:

a. Choosing defaults

i. You can choose **No Default**



ii. You can **choose a default value** from the drop-down menu



- b. Making a field required (intake cannot proceed until a value is added to the field).

Field: Referral position type

No Default

Value: Physician (Resident)

Toggler style: Dropdown Menu

Empty Text: Please Select

Default Overrides Existing Value

Label:

Right of last

Required

Bold

Hidden

Read-Only

- c. Date fields: You have a variety of default options. You can show the date picker, which makes life easier for staff and reduces data entry errors. Choosing max and minimum dates will also help prevent data entry errors.

Field: Date referral received

No Default

Value: mm/dd/yyyy

Today

Yesterday

Show Date Picker

Min Date: 01/01/2015

Max Date: 12/31/2050

- d. Choosing a maximum for number fields will help cut down on data entry errors.

▼ Field: If patient is pregnant at intake, how many weeks?

No Default

Value:

Min. Value

Max. Value

16. Here is a sample of what the Branch logic might look like to the intake staff person:

MLP Information	
MLP Referral Information	
MLP: Date referral received	<input type="text" value="06/20/2016"/>
MLP: Date referral confirmed	<input type="text" value="06/21/2016"/>
MLP: Medical Institution Search for organizations by name	Metro General Medical Center 1234 Busy Town Drive BusyTown, OH 43210 <input type="text"/>
Medical Institution Department*	<input type="text" value="MGMC - Family Medicine"/>
MLP: Medical practice area	<input type="text" value="Family Practice"/>
MLP: Referral position type	<input type="text" value="Physician (Attending)"/>
Search by name for an existing Contact or use the button below to create a new Contact record and set that person's litigation/case contact type to MLP Medical Provider for this case	
<input type="button" value="Create a new mlp medical provider contact"/>	
MLP Medical Provider Search for contacts by name	Megan Sandel MD (216) 555-1212 <input type="text"/>

MLP Patient Information						
Is the client also the patient referred?	<input type="radio"/> Yes <input checked="" type="radio"/> No					
Relationship of client to the referred patient	<input type="text" value="Child"/>					
Add Family Member if MLP Patient is NOT the client.						
Viewing Only Result						
Name	Relationship	Gender	Date of Birth	Age	Phone Numbers	Action
Little Severus Potter	Child	Male	01/01/2010	6	Home: N/A Business: N/A Mobile: N/A	
No Other Pages						

Family Member	
Add Family Member (Show)	

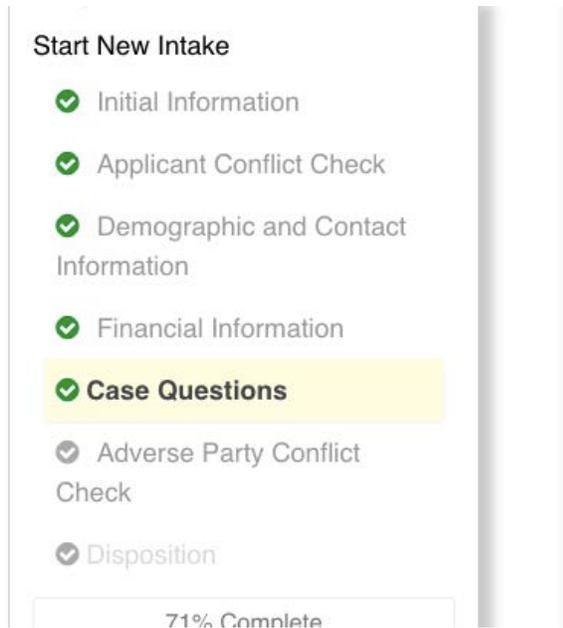
MLP Patient Info, Cont.	
MLP Medical Record Number	987654321
IDC-10 Category*	Diseases of the respiratory system (J00-J99)
IDC-10 Block	J30-J39 Other diseases of upper respiratory tract
MLP IDC10 Diagnosis	Chronic laryngitis and laryngotracheitis

<p>MLP Patient SDOH Risk Categories</p> <p>Hold down the control key (CTRL) to select more than one option.</p>	<ul style="list-style-type: none"> Advanced Age of Patient's Caregiver Child Welfare System Involvement Custody Dispute Domestic Abuse Eviction, History of Foreclosure Homelessness, Current Homelessness, History of Immigration Problems Parent / Caregiver Low Education Level
MLP: Number of ED visits in the past year	3
MLP: Number of hospitalizations in the past year	2
Is the patient pregnant at intake?	<input type="radio"/> Yes <input checked="" type="radio"/> No
If patient is pregnant at intake, how many weeks?	0
Is the patient post-partum at intake?	<input type="radio"/> Yes <input checked="" type="radio"/> No
If patient post-partum at intake, how many months?	0

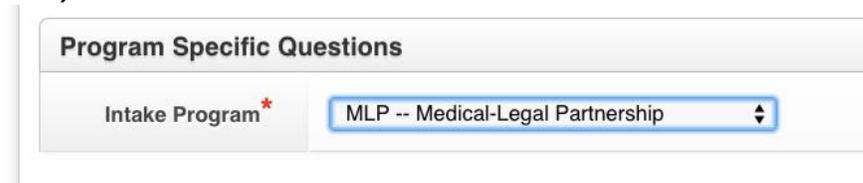
MLP Legal Case Information	
MLP I-HELP Category	Income & Insurance
MLP Outcome of referral received from health care site	Intake completed & case accepted
Intake Notes	<div style="border: 1px solid gray; height: 40px;"></div>

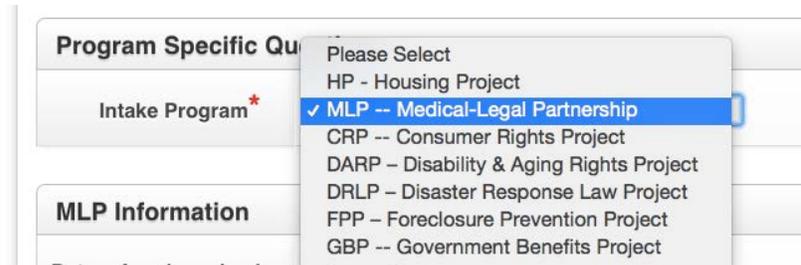
STEP TWO: Decide where in your organization’s intake process you want the MLP Intake Questions to go.

1. The MLP Intake Branch Logic can go anywhere in the Intake Process. Decide where makes the most sense for your organization. The sample below is in the Case Questions section.

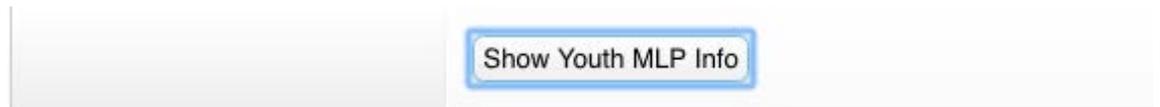


2. The MLP Intake Branch Logic can stem from a drop-down menu or a button.
 - a. Drop-down menu (for example, the Program selected is the MLP)





- b. Button (for example, a button with text: “Click here if MLP case” or “Show MLP Info”)



3. A detailed training by LegalServer on how to build and place Branch Logic is available online at: <https://www.youtube.com/watch?v=hNk-lAsjxeY>.

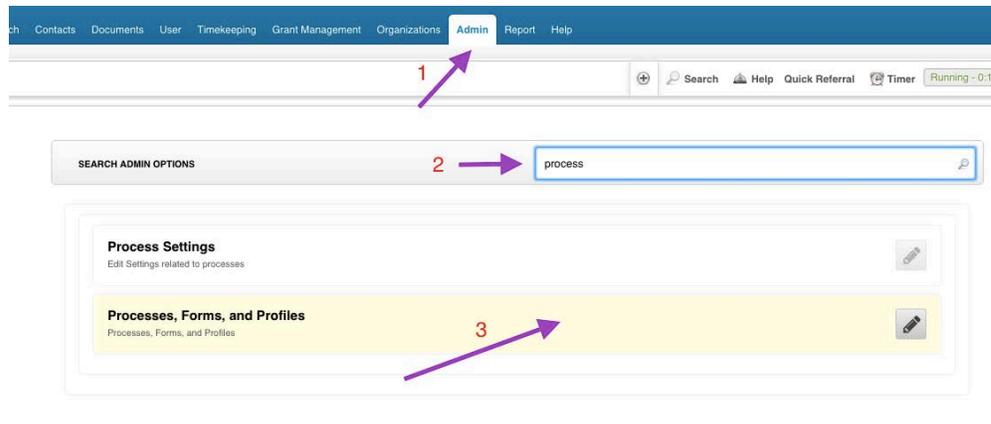
MLP-Legal Server Instruction Sheet #5: Setting Up Branch Logic for I-HELP

These instructions describe how to set up branch logic so that the I-HELP category is selected automatically based on the Legal Problem Code chosen.

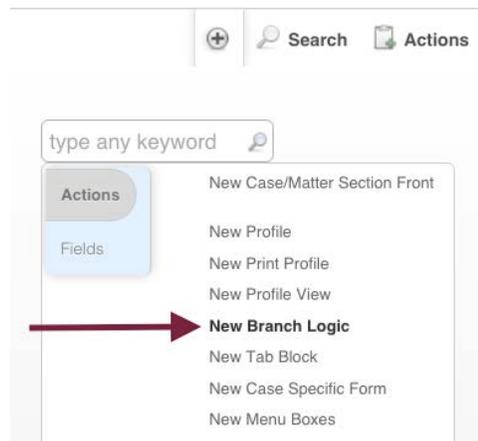
NOTE: There is no Checklist accompanying this Instruction Sheet.

STEP ONE: Building Branch Logic for Each I-HELP Category

1. Click on the Admin tab at the top of any LegalServer page.
2. Type in “process” in the Search Admin Options box.
3. Click anywhere on “Processes, Forms, and Profiles.”



4. Hover over Actions, then click on New Branch Logic



5. Complete the information in the Name & Description section. Name your Branch Logic something along the lines of “BL for MLP I-HELP = Income & Insurance.” (You will be building five versions of the branch logic, one for each of the five I-HELP categories.)

Mark your Branch Logic Active and do not add a Continue Button.

Branch Logic	
▼ Name And Description	
Name *	BL for MLP I-HELP = PE
Description	
Continue Button Text	
Skip This Form When Generating Process As PDF?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Add Continue Button *	<input type="radio"/> Yes <input checked="" type="radio"/> No
Configuration Notes	

6. In the Form Elements section, add the field for MLP: I-HELP Category.

For the Value, choose the value that matches the title of your Branch Logic. (For example, if the title is BL for MLP I-HELP = Income & Insurance”, then choose Income & Insurance.)

If you want the I-HELP categories to be chosen automatically, with no input from the intake worker or other staff person, then choose “Default Overrides Existing Value” and “Read-Only.” If you want to set a default but allow users to make a different decision, do not check those boxes.

If you want the I-HELP field to be hidden, then click on Hidden, as well.

▼ Form Elements

Enabled

Field: MLP: I-HELP Category

No Default

Value: Income & Insurance

Toggler style: Dropdown Menu

Empty Text: Please Select

Default Overrides Existing Value

Label: _____

Right of last

Required

Bold

Hidden

Read-Only

7. Click Continue.

Continue »

8. Using steps #4 - #7 above, set up new branch logic for each of the four remaining I-HELP categories.

Enabled

Field: MLP: I-HELP Category

No Default

Value: Housing & Utilities

Toggler style: Dropdown Menu

Empty Text: Please Select

Default Overrides Existing Value

Label: _____

Right of last

Required

Bold

Hidden

Read-Only

Enabled

Field: MLP: I-HELP Category

No Default

Value: Education & Employment

Toggler style: Dropdown Menu

Empty Text: Please Select

Default Overrides Existing Value

Label: _____

Right of last

Required

Bold

Hidden

Read-Only

Enabled

Field: MLP: I-HELP Category

No Default

Value: Legal Status

Toggler style: Dropdown Menu

Empty Text: Please Select

Default Overrides Existing Value

Label: _____

Right of last

Required

Bold

Hidden

Read-Only

Enabled

Field: MLP: I-HELP Category

No Default

Value: Personal & Family Stability

Toggler style: Dropdown Menu

Empty Text: Please Select

Default Overrides Existing Value

Label: _____

Right of last

Required

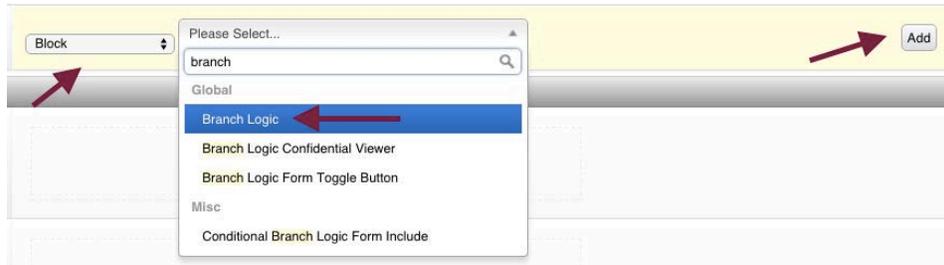
Bold

Hidden

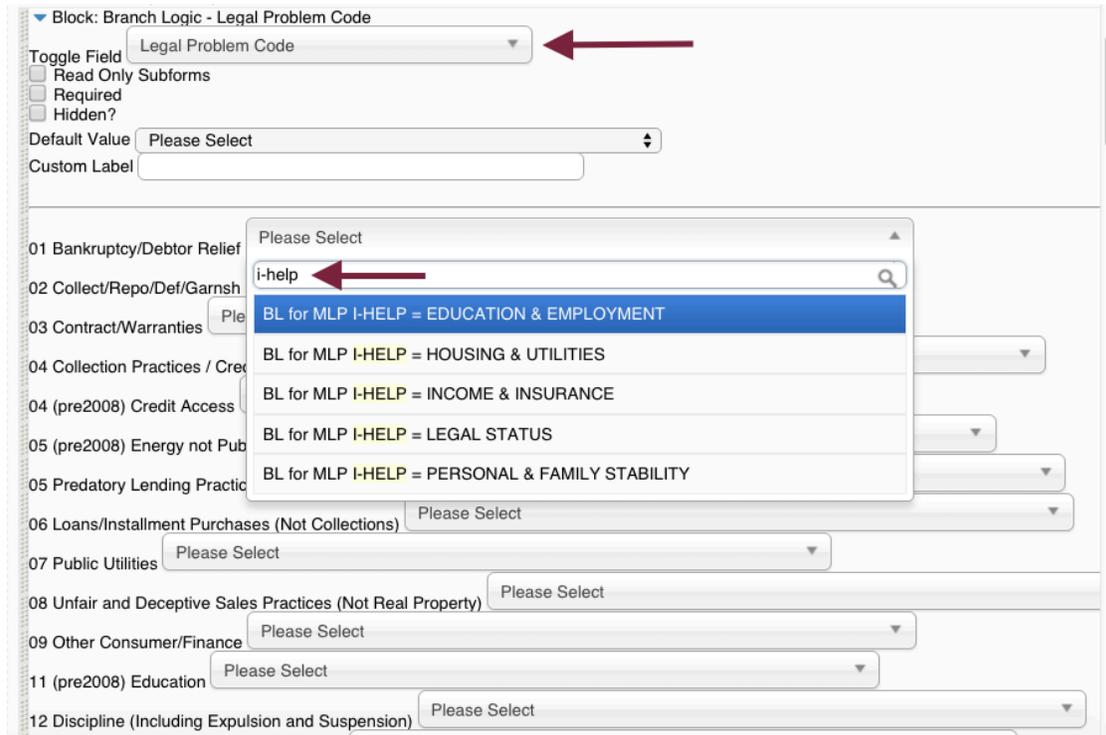
Read-Only

STEP TWO: Adding I-HELP Branch Logic to your Intake Process.

1. Figure out where you would like LegalServer to calculate the I-HELP category. This will probably be on your Intake where the Legal Problem Code is entered or where you are answering MLP questions. It must be placed somewhere AFTER a Legal Problem Code has been selected.
2. Once you have figured out where you want to place the Branch Logic, add “Branch Logic.”



3. Once your Branch Logic Form is added, choose “Legal Problem Code” as the toggle field. Then, choose the appropriate I-HELP category for each Legal Problem Code. (If you type “I-HELP” or “MLP” into the search box, you will limit the number of options you can choose from.)



4. Here is a sample of what your list might look like when you're finished.

01 Bankruptcy/Debtor Relief	BL for MLP I-HELP = INCOME & INSURANCE
02 Collect/Repo/Def/Garnsh	BL for MLP I-HELP = INCOME & INSURANCE
03 Contract/Warranties	BL for MLP I-HELP = INCOME & INSURANCE
04 Collection Practices / Creditor Harassment	BL for MLP I-HELP = INCOME & INSURANCE
04 (pre2008) Credit Access	Please Select
05 (pre2008) Energy not Public Utilities	Please Select
05 Predatory Lending Practices (Not Mortgages)	BL for MLP I-HELP = INCOME & INSURANCE
06 Loans/Installment Purchases (Not Collections)	BL for MLP I-HELP = INCOME & INSURANCE
07 Public Utilities	BL for MLP I-HELP = HOUSING & UTILITIES
08 Unfair and Deceptive Sales Practices (Not Real Property)	BL for MLP I-HELP = INCOME & INSURANCE
09 Other Consumer/Finance	BL for MLP I-HELP = INCOME & INSURANCE
11 (pre2008) Education	Please Select
12 Discipline (Including Expulsion and Suspension)	BL for MLP I-HELP = EDUCATION & EMPLOYMENT
13 Special Education/Learning Disabilities	BL for MLP I-HELP = EDUCATION & EMPLOYMENT
14 Access (Including Bilingual, Residency, Testing)	BL for MLP I-HELP = EDUCATION & EMPLOYMENT

5. Click Continue.

Continue »

6. Do a practice intake to make sure the branch logic works. The I-HELP category should change based on the Legal Problem Code selected.

Legal Problem Code	07 Public Utilities
MLP: I-HELP Category	Housing & Utilities
Legal Problem Code	12 Discipline (Including Expulsion and Suspension)
MLP: I-HELP Category	Education & Employment

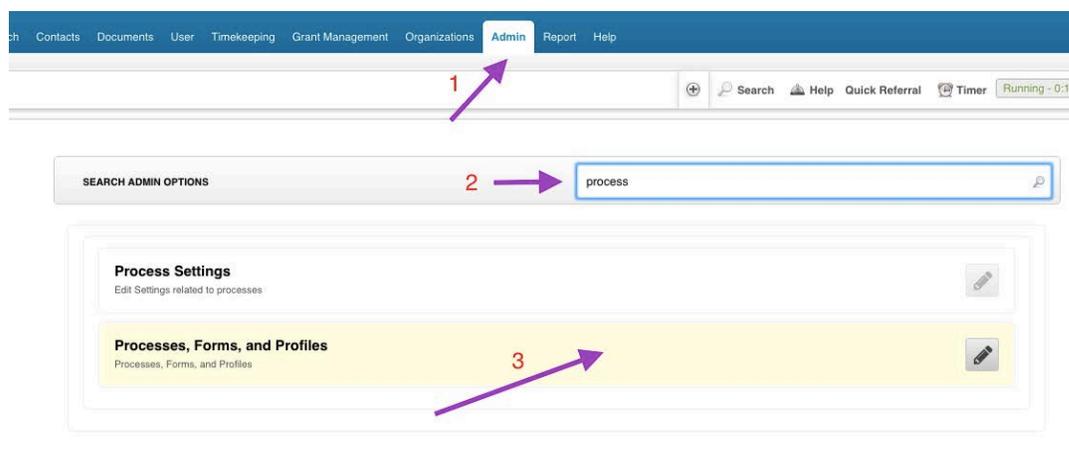
Legal Problem Code	37 Domestic Abuse
MLP: I-HELP Category	Personal & Family Stability
Legal Problem Code	51 Medicaid
MLP: I-HELP Category	Income & Insurance
Legal Problem Code	81 Immigration/Naturalization
MLP: I-HELP Category	Legal Status

7. You're done!

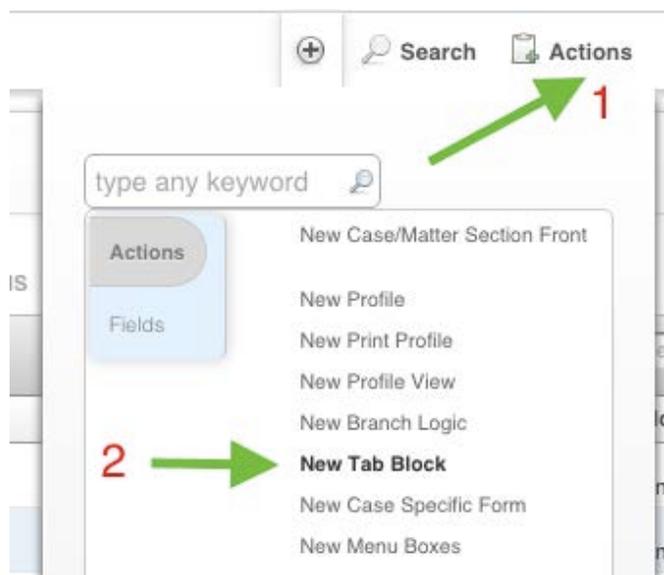
MLP-Legal Server Instruction Sheet #6: Setting Up an MLP Profile View (For Use with Checklist #6)

STEP ONE: Setting Up an MLP Tab Block

1. Click on the Admin tab at the top of any LegalServer page.
2. Type in “process” in the Search Admin Options box.
3. Click anywhere on “Processes, Forms, and Profiles.”



4. Hover over Actions, then click on New Tab Block



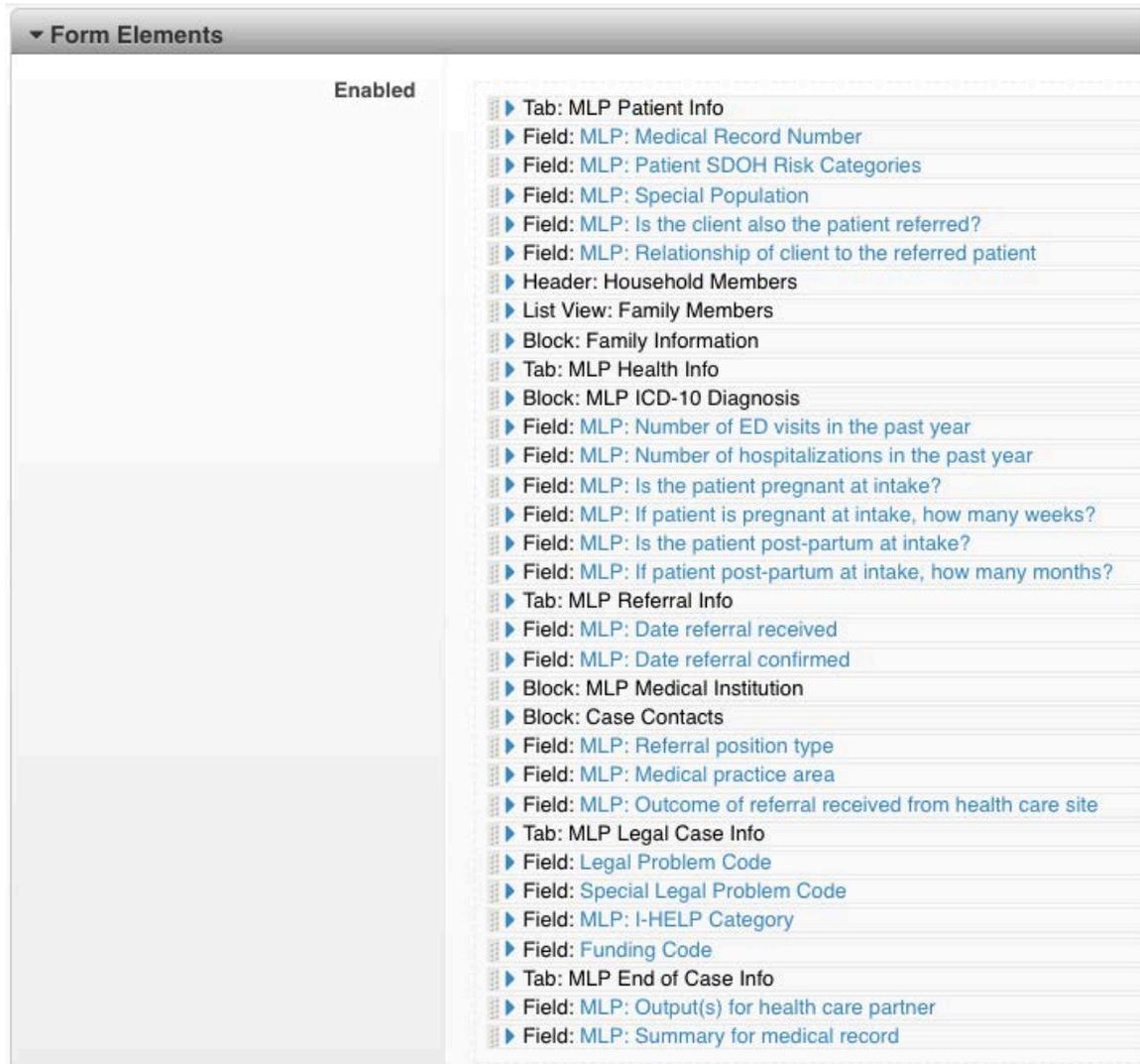
5. Give your Tab Block a name and make sure you mark it Active.

Tab Block

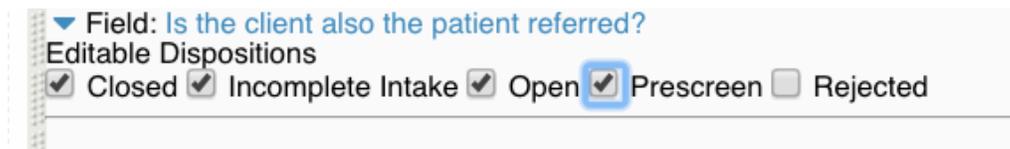
▼ Name And Description

Name*	<input type="text" value="MLP Tab Block"/>	
Description	<input type="text"/>	
Continue Button Text	<input type="text"/>	
Skip This Form When Generating Process As PDF?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Active*	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Add Continue Button*	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Configuration Notes	<input type="text"/>	
Half Width*	<input type="radio"/> Yes <input checked="" type="radio"/> No	

6. In the Form Elements section, add whichever Tabs, Fields, Blocks, and List Views you wish (*see accompanying Checklist #6 to determine your MLP's selections*). Here is a sample:



7. For each field and block, decide whether you would like case handlers to be able to edit the field directly from the Profile. You can select which case dispositions will allow edits. (For example, you could choose to allow edits for open cases but not for closed cases.) (*see accompanying Checklist #6 to determine your MLP's selections*)

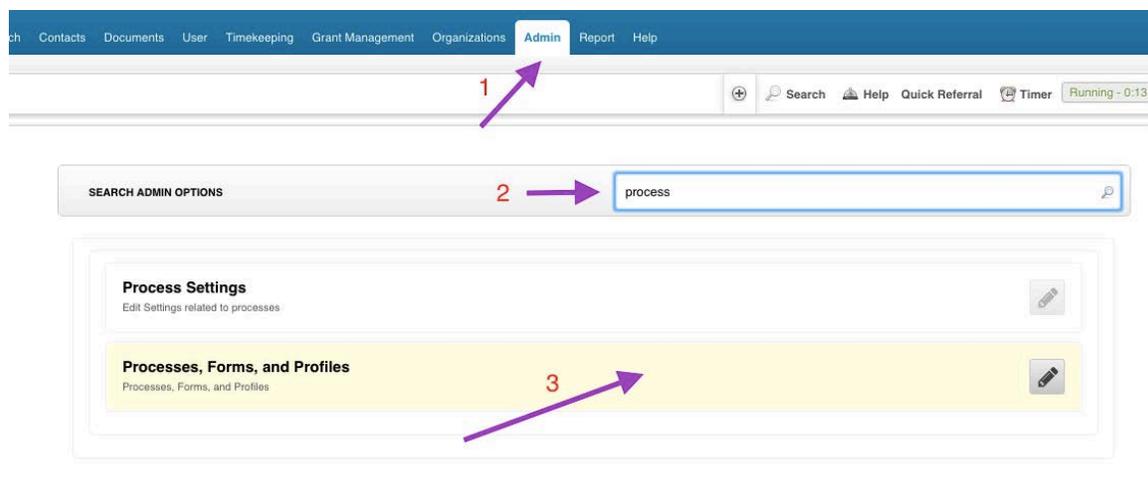


- Note that you can also set limitations on date and numeric fields, and customize most blocks, similar to the options described in Instruction Sheet #4.
- Hit Continue to save your work.

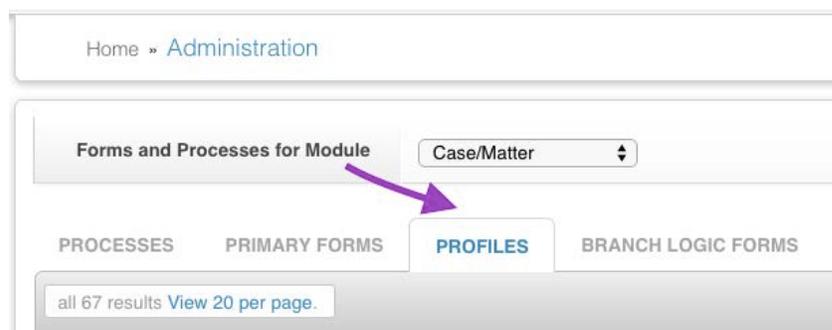
Continue »

STEP TWO: Setting Up the MLP Profile View

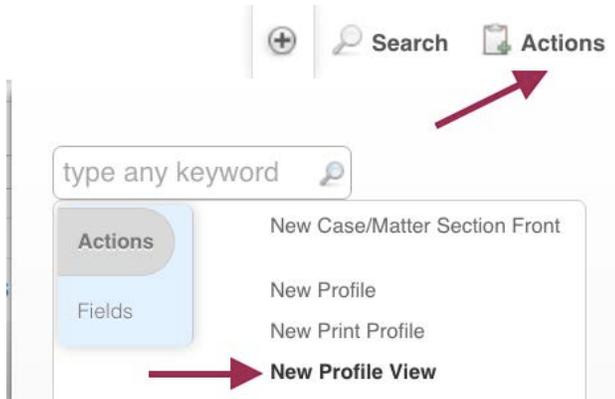
- Click on the Admin tab at the top of any LegalServer page.
- Type in “process” in the Search Admin Options box.
- Click anywhere on “Processes, Forms, and Profiles.”



- Click on the Profiles tab.



5. Hover over Actions, then click on New Profile View.



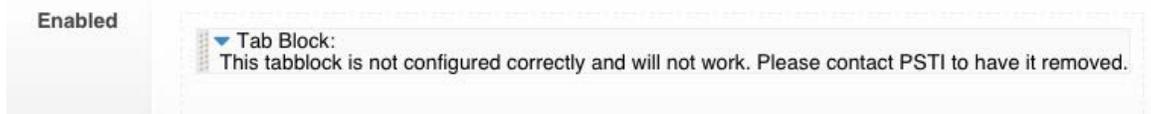
6. Give your Profile a name (such as MLP Profile View) and mark it as Active. Choose a Parent Profile. Many sites will want to choose Main Profile. Select which devices you'd like to be able to view your profile.

A screenshot of a form titled 'Name And Description'. The form has several fields: 'Name' (MLP Profile View), 'Description', 'Continue Button Text', 'Active' (Yes/No radio buttons), 'Configuration Notes', 'Parent Profile' (Main Profile), and 'Device Type' (Computer Screen, Phone Screen, Tablet Screen). Red arrows point to the 'Name' field, the 'Active' radio buttons, the 'Parent Profile' dropdown, and the 'Device Type' selection box.

7. In the Form Elements section, add a Tab Block.

A screenshot of a form titled 'Form Elements'. The form has two sections: 'Enabled' and 'Disabled'. At the bottom, there is a dropdown menu with 'Tab Block' selected and an 'Add' button. Red arrows point to the 'Tab Block' dropdown and the 'Add' button.

8. For some reason, LegalServer won't let you customize the tab block right away. Instead, it will give you an error message. (LegalServer is aware of this issue, and one day it will go away.)



9. Ignore the error message and do not contact PSTI. Instead, click Continue.



10. Go back to the Profiles tab, find your Profile, and click on the pencil icon to edit it.

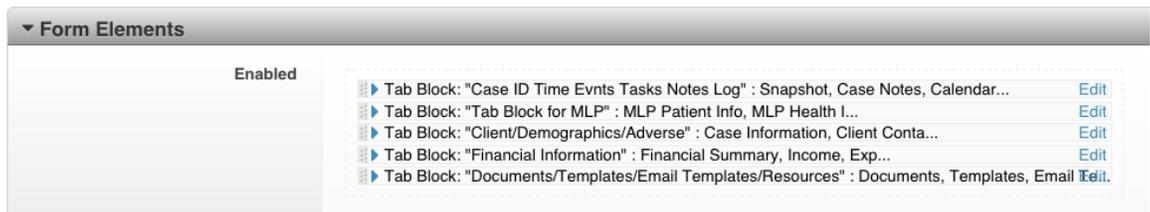


11. Go back to the Tab Block that you added before, and choose the Tab Block for MLP you created earlier from the dropdown options.



12. Review another profile (such as your Main Profile) to see what Tab Blocks you might like to add in addition to the MLP Tab Block.

13. Add whichever additional Tab Blocks you'd like, and place them in the order you want. Here is an example of what it might look like:



14. Click the Continue button when you're done.



15. Your new Profile has been created!

STEP THREE: Activating Your Profile in Views on the Main Profile

1. Go back to Processes, Forms, and Profiles and click on the Profiles tab.



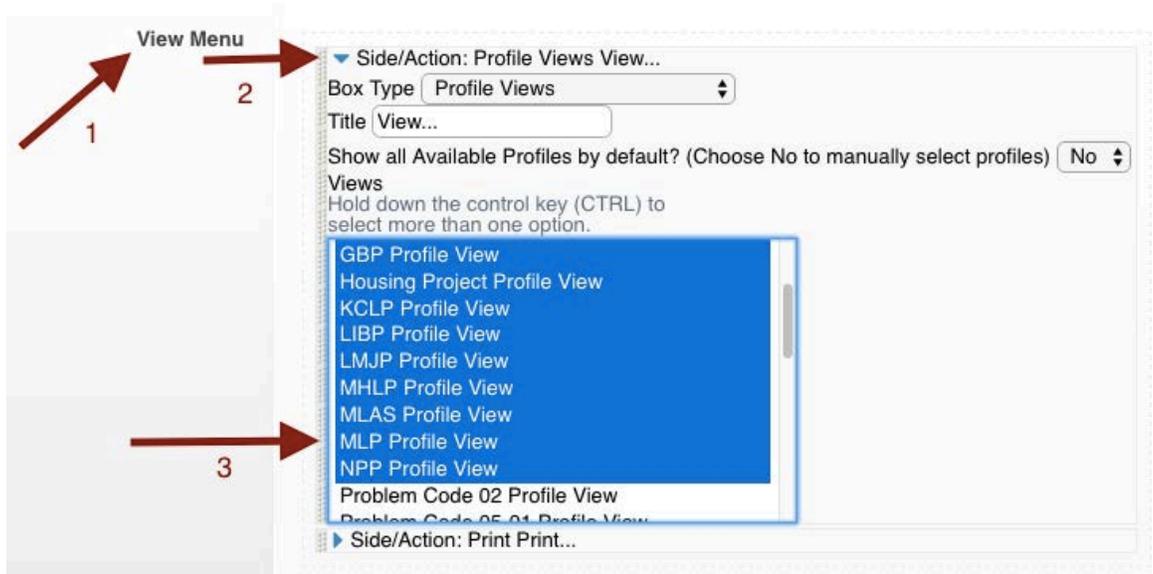
2. Find the Main Profile, and click on the pencil icon to edit.



3. Scroll down to Side/Action Elements, and click on "Edit" for Menu Boxes.



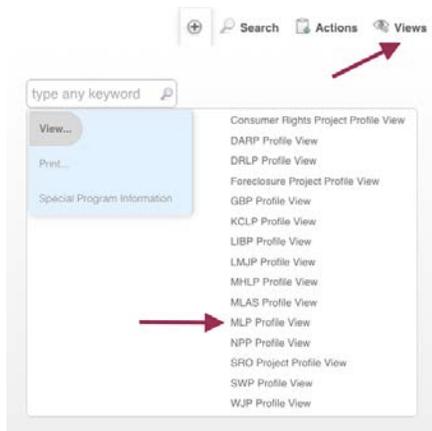
4. Scroll down to the View Menu, open up Side/Action: Profile Views View..., and activate your new MLP Profile View (making sure you don't de-select any Profiles already selected).



5. Click Continue.

Continue »

6. To view the Profile from any case, hover over View and then select your MLP Profile View.



7. Here is what the sample looks like to the case handler (one image for each of the internal tabs)

MLP PATIENT INFO	MLP HEALTH INFO	MLP REFERRAL INFO	MLP CASE INFO	MLP END OF CASE INFO
MLP Medical Record Number	12345678			
MLP Patient SDOH Risk Categories	Homelessness, Current Patient Criminal Record			
Is the client also the patient referred?	Yes			
Relationship of client to the referred patient	Self (Patient is the Client)			

MLP PATIENT INFO	MLP HEALTH INFO	MLP REFERRAL INFO	MLP CASE INFO	MLP END OF CASE INFO
MLP IDC-10 Diagnosis [Edt]				
IDC-10 Category	Diseases of the respiratory system (J00-J99)			
IDC-10 Block	J40-J47 Chronic lower respiratory diseases			
MLP IDC10 Diagnosis	Asthma			
MLP: Number of ED visits in the past year	4			
MLP: Number of hospitalizations in the past year	1			
Is the patient pregnant at intake?	Yes			
If patient is pregnant at intake, how many weeks?	16			
Is the patient post-partum at intake?	Yes			
If patient post-partum at intake, how many months?	19			

MLP PATIENT INFO MLP HEALTH INFO **MLP REFERRAL INFO** MLP CASE INFO MLP END OF CASE INFO

MLP Outcome of referral received from health care site	Intake completed & case accepted
Date referral received	01/20/2016
Date referral confirmed	01/21/2016

MLP Medical Institution [EDIT]

Medical Institution Search for organizations by name	MetroHealth Medical Center 2500 MetroHealth Drive Cleveland, OH 44113 <input type="text"/>
Medical Institution Department	Main Campus -- Pediatrics

Case Contacts [EDIT]

Name	Robert Needlman MD
Work Phone	(216) 778-7800
Medical practice are	Pulmonology
Referral position type	Physician (Attending)

MLP PATIENT INFO MLP HEALTH INFO MLP REFERRAL INFO **MLP CASE INFO** MLP END OF CASE INFO

Problem Code/Special Problem Code [EDIT]

Legal Problem Code*	75 SSI
Special Legal Problem Code	75-04 SSI Overpayment
MLP I-HELP Category	Income & Insurance
Funding Code	N/A

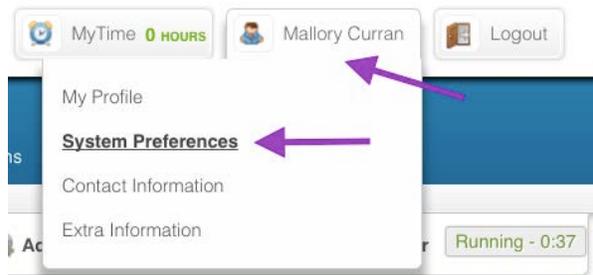
MLP PATIENT INFO MLP HEALTH INFO MLP REFERRAL INFO MLP CASE INFO **MLP END OF CASE INFO**

MLP Ouput(s) for health care partner	Accommodated patient need for home / hospital visit Appeared at administrative hearing on behalf of client
MLP Summary for medical record	MetroHealth referred this patient because he was cut off food stamps. After a hearing at which the MLP attorney represented the patient, his food stamps were restored in full, and the patient now receives the maximum amount of food stamps each month.

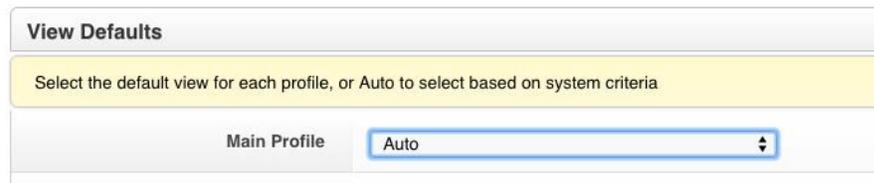
STEP FOUR (Optional): Setting the MLP Profile View as a User's Default Profile View

If your MLP staff would like to have all of their cases default to the MLP Profile view, they can modify their personal System Preferences to do so on their own.

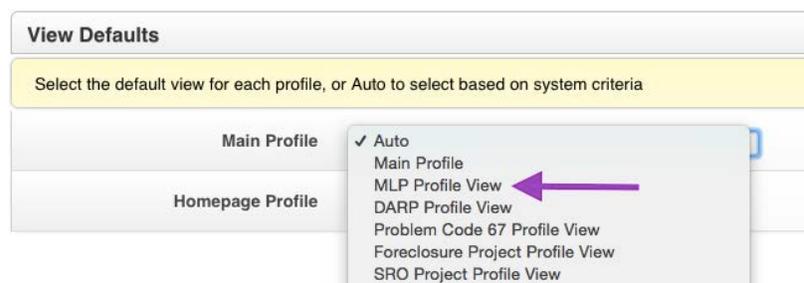
1. Hover over your (the user's) name in the upper right hand corner of any LegalServer page and then click on System Preferences.



2. Scroll all the way down to the bottom to View Defaults.



3. For Main Profile, choose your MLP Profile View from the drop-down list.



4. Click continue.

Continue »

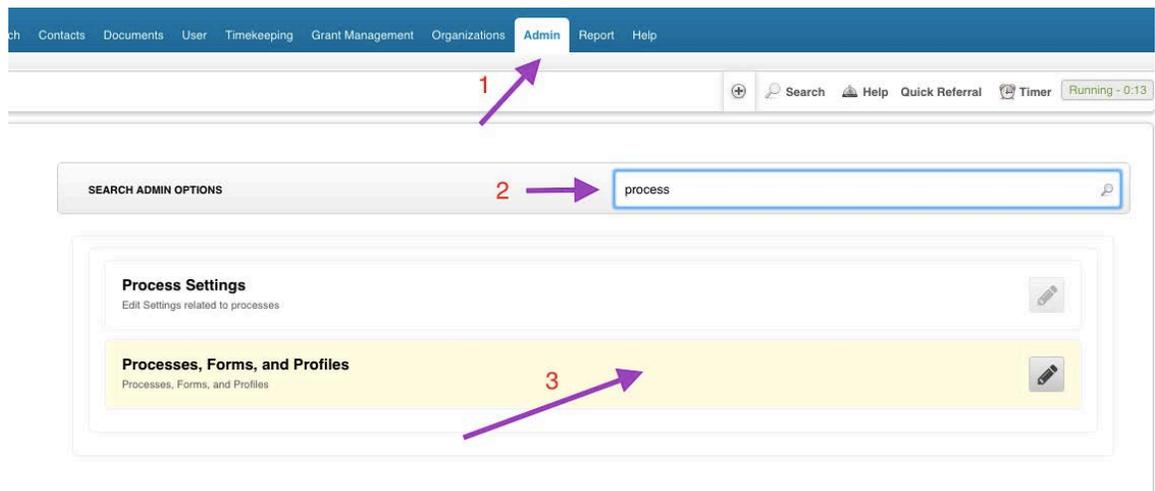
5. You're done!

MLP-Legal Server Instruction Sheet #7: Building an MLP Special Program Page (or: Building an Edit MLP Info Page) (For Use with Checklist #7)

These instructions can be used to build a Special Program Page for MLP (some organizations prefer to use Special Program pages rather than Profile Views) or a process by which to “Edit MLP Information.” (The process is the same, and only the names are different.) Building this option will be particularly helpful to programs that want to go back and add information for cases that were opened prior to implementing the new MLP features.

STEP ONE: Building the MLP Special Program Form.

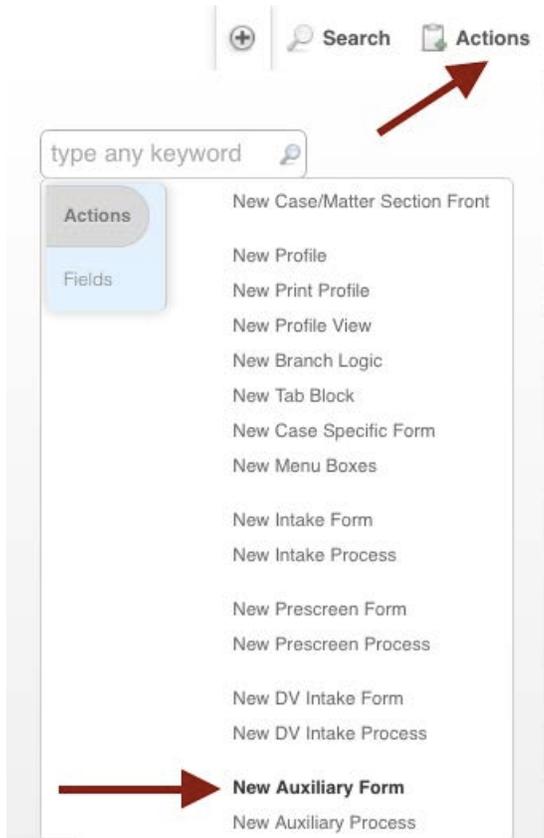
8. Click on the Admin tab at the top of any LegalServer page.
9. Type in “process” in the Search Admin Options box.
10. Click anywhere on “Processes, Forms, and Profiles.”



11. Click on the Primary Forms tab.



12. From the Actions menu, click on New Auxiliary Form.



13. Name your form. If your program uses Special Programs, name it something like “Special Program: MLP.” If you are using the form as a more generic editing tool, name it something like “Edit MLP Info.”

Name*

or

Name*

14. Mark it active, add a continue button, and confirm that the Process Type is marked for Auxiliary.

▼ Name And Description	
Name *	<input type="text" value="Edit MLP Information (F)"/>
Description	<input type="text"/>
Create New Process Containing This Form?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Continue Button Text	<input type="text"/>
Skip This Form When Generating Process As PDF?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active *	<input checked="" type="radio"/> Yes <input type="radio"/> No 
Add Continue Button *	<input checked="" type="radio"/> Yes <input type="radio"/> No 
Process Types * Hold down the control key (CTRL) to select more than one option.	<div style="border: 1px solid gray; padding: 5px;"><input checked="" type="checkbox"/> Auxiliary <input type="checkbox"/> Document <input type="checkbox"/> DV Intake <input type="checkbox"/> Intake <input type="checkbox"/> Prescreen</div> 

15. Under Form Elements, choose whichever fields, blocks, and views you would like to include on your page. Most likely, this form will mirror the options you created for MLP Intake Branch Logic. (See Checklist #7 for the items your team has selected.) Here is a sample of what your Form Elements might look like:

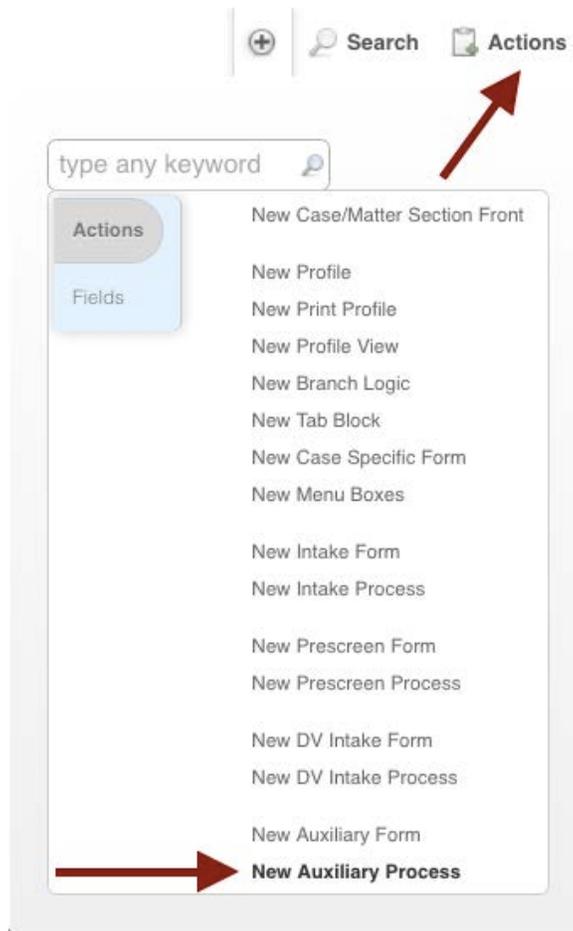


16. Remember that you are free to add non-MLP existing fields and/or create site-specific MLP fields.

17. For special instructions on customizing MLP-specific and -related fields and blocks, please see Instruction Sheet #4, Step One, bullets #11 - #15.

STEP TWO: Building the MLP Special Program Process

1. From the Processes, Forms, & Profiles page, select New Auxiliary Process from the Actions menu.



2. Name the Process to match your Form names (such as Special Program: MLP or Edit MLP Info.)

Name *	Special Program: MLP
--------	----------------------

or

Name *	Edit MLP Info
--------	---------------

3. Mark the process Complete and Active. Choose Action for Link Category, and select which dispositions for which you'd like the process to be available.

▼ Attributes	
Name *	Special Program: MLP
Complete	<input checked="" type="radio"/> Yes <input type="radio"/> No 
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No 
Show Process Link in Module Static Profile	<input type="radio"/> Yes <input type="radio"/> No
Process Description	<input type="text"/>
You can set permissions after creating this process.	
Redirect to outstanding tasks	<input type="radio"/> Yes <input type="radio"/> No
Link Category	Action 
Case Dispositions to Show Hold down the control key (CTRL) to select more than one option.	<div style="border: 1px solid #ccc; padding: 5px;"> Open Closed Rejected Incomplete Intake Prescreen Pending </div> 

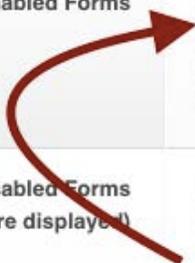
4. Find your form and move it up to the Enabled section. (Use the search feature for “MLP” if the list is too long to easily find your form.) You MUST grab by the gray bar to the left of the blue triangle.

Enabled Forms

▶ Special Program: MLP [Edit]

Disabled Forms
(only active forms are displayed)

▶ Edit Group/Individual Client Status [Edit]
 ▶ Edit Address [Edit]
 ▶ Disability Rights [Edit]
 ▶ DB/OTE Department of Social Services [Edit]
 ▶ Case Closing (no time) [Edit]
 ▶ Retainer Compliance Form [Edit]
 ▶ Intake Type & Off-site Location [Edit]



5. Click Continue.

Continue »

STEP THREE: Adding Your Process to the Actions Menu

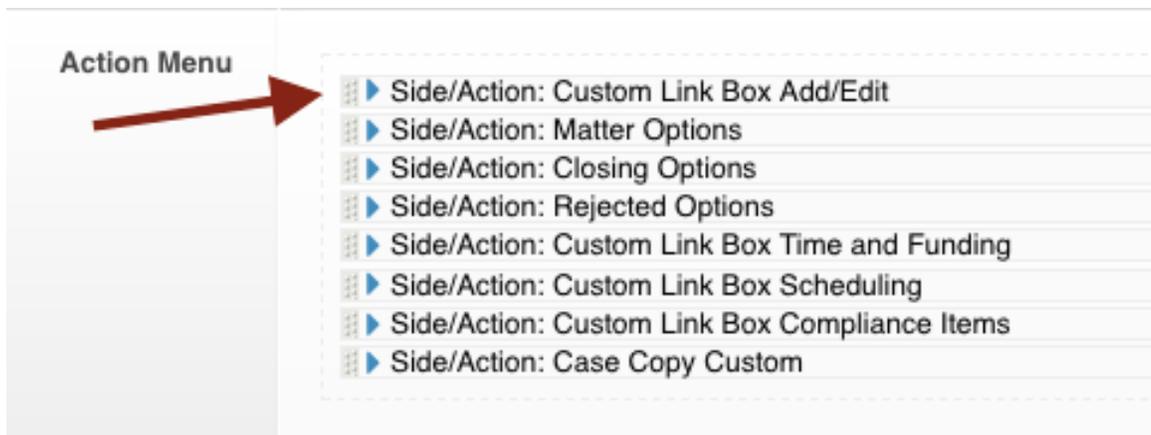
1. From the Processes, Forms, & Profiles Page, go to Profiles.
2. Find the Main Profile, and Click on the pencil icon to edit.



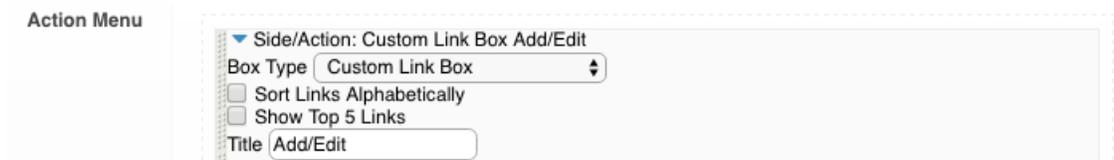
3. Go to the Side/Action Elements section, and click on Edit for the Side Bar -- Side/Action: Menu Boxes.



4. Then, click on the blue triangle next to the Side/Action: Custom Link Box Add/Edit.



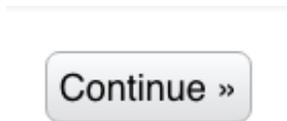
5. The top section should look like this.



6. Add a new row, and add your Process.

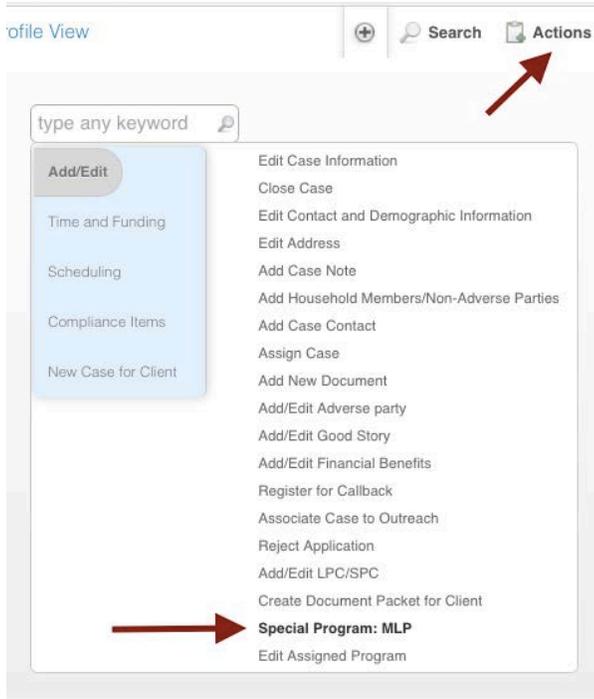


7. Click Continue.



8. If you have an MLP Profile View that uses something other than Menu Boxes, repeat #1 - #7 above with the MLP Profile View.

9. Try out your New Process to make sure it's working properly.



10. Here is a sample of what the Special Projects: MLP (or Edit MLP Information) could look like on the front end:

MLP Referral Information	
MLP: Date referral received	<input type="text" value="01/01/2016"/>
MLP: Date referral confirmed	<input type="text" value="01/01/2016"/>
MLP: Medical Institution Search for organizations by name	Metro General Medical Center 1234 Busy Town Drive BusyTown, OH 43210 <input type="text"/>
Medical Institution Department*	MGMC - Family Medicine ▾

List of Current Case Contacts					
all 5 results					
Name ▾	Role	Phone	Email	Address	Edit
Curran, Mallory	Assignment		mallory2015@mty.org	N/A	
Dumbledore, Albus	Client	Cell: 718-555-1212	ProfDumbledore@hogwarts.edu	386 Flatbush Avenue Ext, #100, Brooklyn, NY 11201	
Dumbledore, Aria	Family Member	Cell: 917-555-1212	AriaD@internet.com	386 Flatbush Avenue Ext, Apt. 100, Brooklyn, NY 11201	
Sandel MD, Megan	MLP Medical Provider	Work: 216-555-1212	msandel@hospital.org	1234 Busy Town Drive BusyTown, OH 43210	
Group: Social Security Administration	Common Adverse Party			Social Security Administration	

No Other Pages

If necessary, add Referring Provider Information

Search by name for an existing Contact or use the button below to create a new Contact record and set that person's litigation/case contact type to MLP Medical Provider for this case

MLP Medical Provider
Search for contacts by name

MLP: Medical practice area

MLP: Referral position type

MLP Patient Information	
MLP: Medical Record Number	<input type="text" value="123456789"/>
MLP: Is the client also the patient referred?*	<input checked="" type="radio"/> Yes <input type="radio"/> No
MLP: Relationship of client to the referred patient	Self (Patient is the Client) ▾
MLP: Patient SDOH Risk Categories Hold down the control key (CTRL) to select more than one option.	<ul style="list-style-type: none"> Advanced Age of Patient's Caregiver Child Welfare System Involvement Custody Dispute Domestic Abuse Eviction, History of Foreclosure Homelessness, Current Homelessness, History of Homelessness, Living in Shelter Immigration Problems
MLP: Special Population Hold down the control key (CTRL) to select more than one option.	<ul style="list-style-type: none"> Child (under 18) Chronic Illness Homeless / Unstably Housed Older Adult (age 60+) Veteran

List of Family Members						
Viewing Only Result						 
Name	Relationship	Gender	Date of Birth	Age	Phone Numbers	Action
Aria Dumbledore	Child	Female	01/01/1950	66	Home: N/A Business: N/A Mobile: (917) 555-1212	✖
No Other Pages						

Family Member

[Edit Family Member \(Show\)](#)

MLP Medical Information

MLP: ICD-10 Category*

MLP: ICD-10 Block

MLP: ICD-10 Diagnosis

MLP: Number of ED visits in the past year

MLP: Number of hospitalizations in the past year

MLP: Is the patient pregnant at intake? Yes No

MLP: If patient is pregnant at intake, how many weeks?

MLP: Is the patient post-partum at intake? Yes No

MLP: If patient post-partum at intake, how many months?

MLP Legal Case Information

Legal Problem Code

Special Legal Problem Code

MLP: I-HELP Category

MLP End of Case Information

MLP: Output(s) for health care partner
Hold down the control key (CTRL) to select more than one option.

- Accommodated patient need for home / hospital visit
- Appeared at administrative hearing on behalf of client
- Attended IEP, disciplinary, or other educational meeting with student
- Appeared in court on behalf of client
- Placed client with pro bono attorney
- Placed client with free law school clinic
- Assisted client with preparation of legal documents
- Assisted client with preparation of administrative documents
- Lost case
- Provided client with advice about legal problem

MLP: Summary for medical record

[Continue](#)

11. You're done!

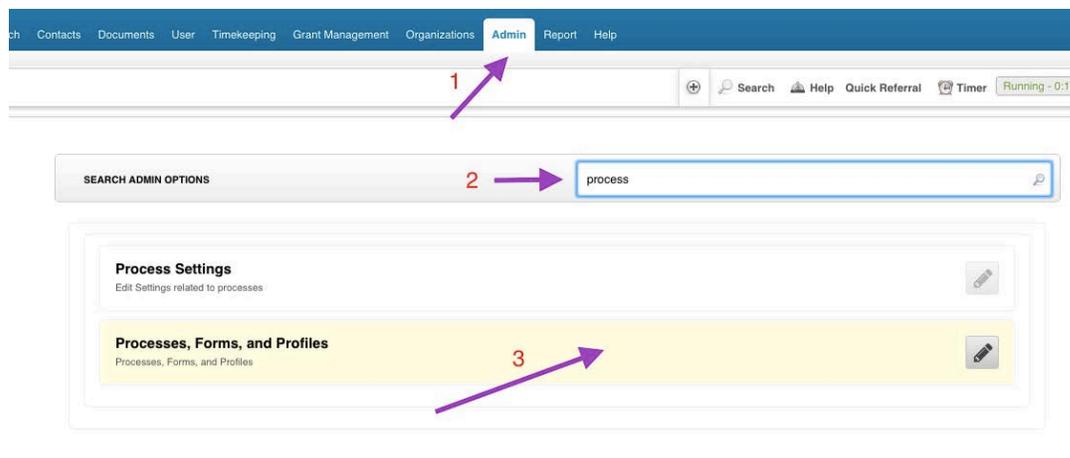
MLP-Legal Server Instruction Sheet #8: Tracking MLP Referrals Received from Health Care Partners

If your MLP receives referrals directly from its health care partner(s) (for example by fax, email, or paper), you may want to build a Prescreen process that allows you to enter that information before contacting the patient. Doing so will allow you to better track which patients complete an intake. The information entered as part of the prescreen can automatically be populated in a full intake (reducing double data entry).

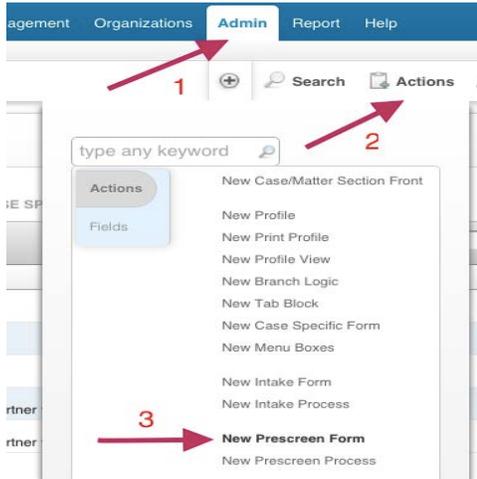
NOTE: There is no Checklist accompanying this Instruction Sheet. LegalServer administrators should ask their MLP teams for a copy of the referral information provided by health care partners to determine which fields and blocks should be used.

STEP ONE: Setting Up MLP Prescreen Forms

1. Click on the Admin tab at the top of any LegalServer page.
2. Type in “process” in the Search Admin Options box.
3. Click anywhere on “Processes, Forms, and Profiles.”



4. Hover over Actions, then click on New Prescreen Form



5. Complete the information in the Name & Description section. When giving your Prescreen Form a name, add “(Page 1)” at the end. (For example, “MLP Referral Form (Page 1)”.)

For Continue Button Text, type in something like “Continue.”

Be sure to make your Form active, and add a continue button. Process Types should = prescreen.

Prescreen Form

▼ Name And Description

Name*	MLP Referral Rec'd For	←
Description	record a referral of an M	
Continue Button Text	Save & Continue	←
Skip This Form When Generating Process As PDF?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Active*	<input checked="" type="radio"/> Yes <input type="radio"/> No	←
Add Continue Button*	<input checked="" type="radio"/> Yes <input type="radio"/> No	←
Process Types* Hold down the control key (CTRL) to select more than one option.	<input type="checkbox"/> Auxiliary <input type="checkbox"/> Document <input type="checkbox"/> DV Intake <input type="checkbox"/> Intake <input checked="" type="checkbox"/> Prescreen	←
Configuration Notes		

6. For the Form Element sections, keep it simple for Page 1. There cannot be any blocks on this page. Here is a suggested Page 1:

▼ Form Elements

Enabled

- ▶ Header: MLP Referral Form -- Page 1
- ▶ Field: Prescreen Date
- ▶ Field: Prescreen Intake User
- ▶ Field: Prescreen Office Location
- ▶ Field: Prescreen Program

7. Edit the fields so that everything auto-populates.

▼ Field: Prescreen Date

No Default

Value: mm/dd/yyyy

Today

Yesterday

Show Date Picker

Min Date 01/01/2016

Max Date 12/31/2050

Default Overrides Existing Value

Label

Right of last

Required

Bold

Hidden

Read-Only

▼ Field: Prescreen Intake User

No Default

Current User

Default Overrides Existing Value

Label

Right of last

Required

Bold

Hidden

Read-Only

▼ Field: Prescreen Date

No Default

Value: mm/dd/yyyy

Today

Yesterday

Show Date Picker

Min Date 01/01/2016

Max Date 12/31/2050

Default Overrides Existing Value

Label

Right of last

Required

Bold

Hidden

Read-Only

▼ Field: Prescreen Intake User

No Default

Current User

Default Overrides Existing Value

Label

Right of last

Required

Bold

Hidden

Read-Only

8. Click continue.

Continue »

9. Repeat steps 1 – 4 above to create a second Prescreen Form.

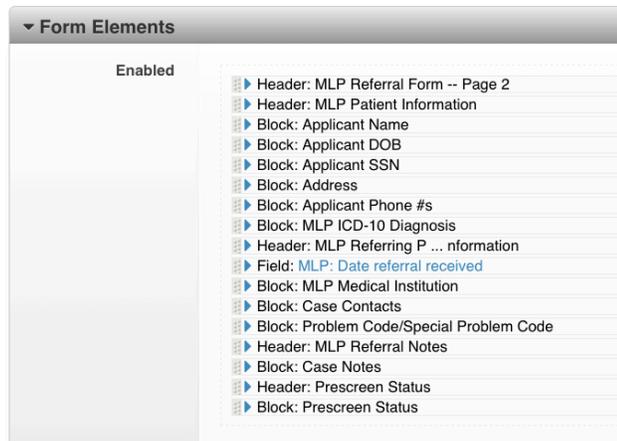
10. Name this form the same as the first form, but add “Page 2” at the end. Otherwise enter the same information in the Name and Description. For example: “MLP Referral Form (Page 2)”.

Prescreen Form

▼ Name And Description

Name *	MLP Referral Rec'd For
Description	record a referral of an M
Continue Button Text	Save & Continue
Skip This Form When Generating Process As PDF?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Add Continue Button *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Process Types * Hold down the control key (CTRL) to select more than one option.	<input type="checkbox"/> Auxiliary <input type="checkbox"/> Document <input type="checkbox"/> DV Intake <input type="checkbox"/> Intake <input checked="" type="checkbox"/> Prescreen
Configuration Notes	

11. In the Form Elements section for Page 2, add whichever fields and blocks match with the information your health care partner provides to you in their referral. A sample is listed below.



12. As a reminder, review the customization options for all Blocks and Fields you have added.
13. Click Continue.



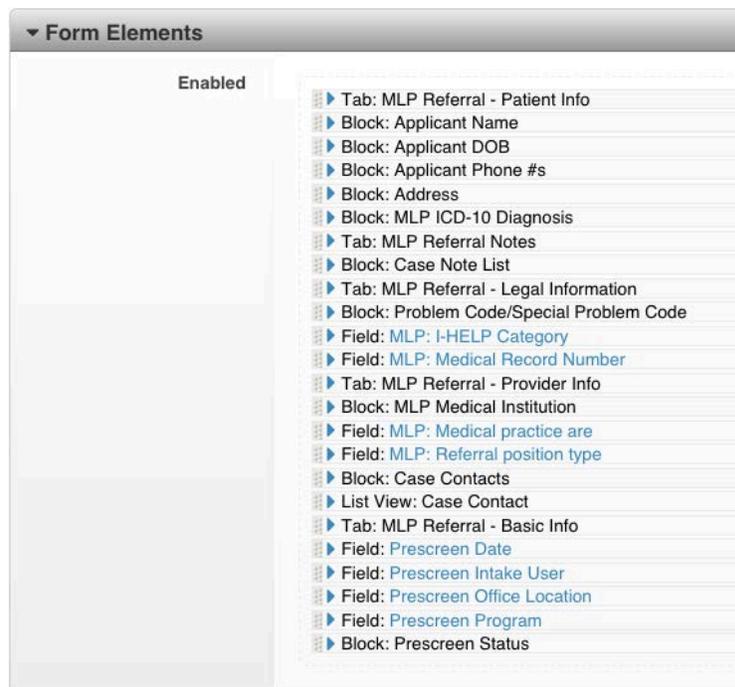
STEP TWO: Build an MLP Referrals Received Profile View

1. Using the instructions in Instruction Sheet #6 as a guide, build an MLP Referrals Received Profile View.
2. Here is a sample of what the Profile and Tab Block might look like:

Profile View:

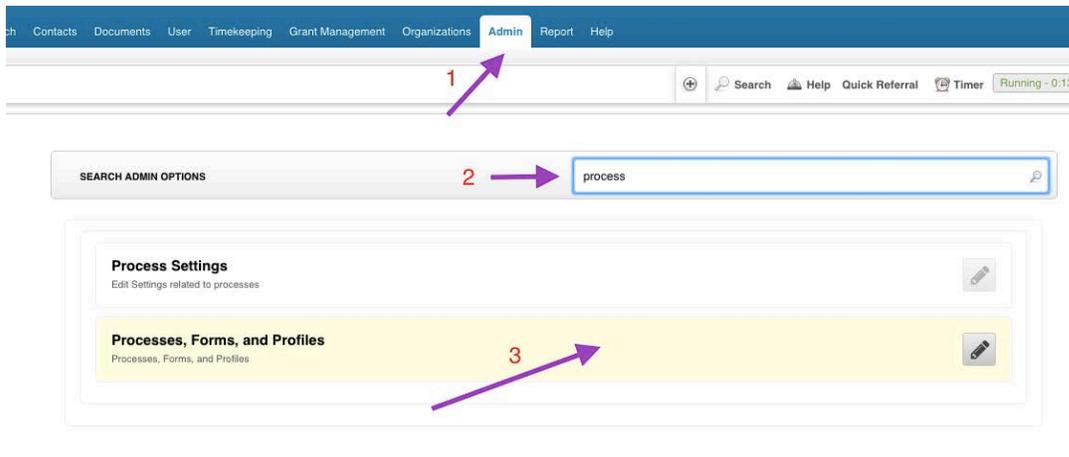


Tab Block: "MLP Referral Rec'd from Health Care Partner"

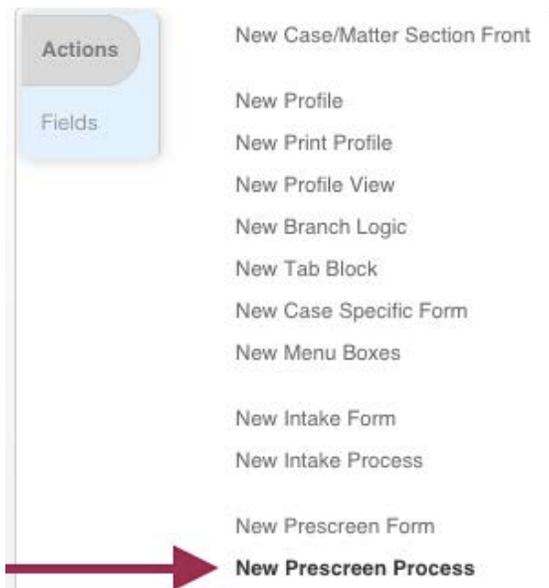


STEP THREE: Setting Up a Prescreen Process to Track MLP Referrals Rec'd

1. Click on the Admin tab at the top of any LegalServer page.
2. Type in “process” in the Search Admin Options box.
3. Click anywhere on “Processes, Forms, and Profiles.”



4. Hover over Actions, then click on New Prescreen Process



5. Name your process something like “Record an MLP Referral Received.” Mark “yes” for Complete, Active, and Show on Quickbar.

Process

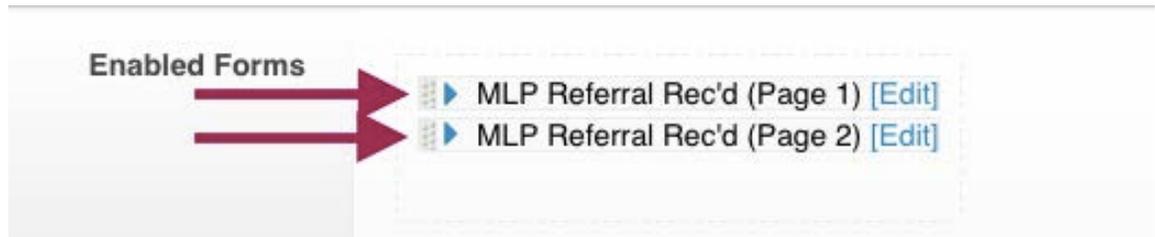
▼ Attributes

Name*	<input type="text" value="Record an MLP Referra"/>	←
Complete	<input checked="" type="radio"/> Yes <input type="radio"/> No	←
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No	←
Show on Quickbar	<input checked="" type="radio"/> Yes <input type="radio"/> No	←
Show Process Link in Module Static Profile	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Process Description	<input type="text" value="record a referral of an M"/>	

6. Your MLP Referral Rec'd forms should show up under the Disabled Forms section.

Enabled Forms	
Disabled Forms (only active forms are displayed)	<ul style="list-style-type: none">▶ MLP Referral Rec'd (Page 1) [Edit]▶ MLP Referral Rec'd (Page 2) [Edit]▶ Prescreen Form [Edit]

7. Pull your MLP Referrals Forms by the gray bar to the left of the blue triangle up to the Enabled Forms section.



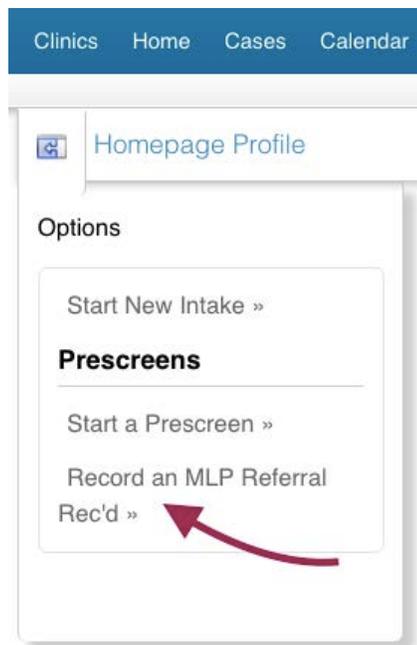
8. For the Followup Profile, choose MLP Referral Rec'd Profile View.



9. Click Continue.



10. Your process should now show up on the left-hand side of your Home Page.



11. Here is a sample of what Page 1 might look like, depending on how you set up your forms:

Record an MLP Referral Rec'd

Record an MLP Referral Received (Page 1)

Record an MLP Referral Received (Page 2)

0% Complete

Options

[Start New Intake >](#)

Prescreens

MLP Referral Form -- Page 1	
Prescreen Date	02/05/2016
Prescreen Intake User	Curran, Mallory
Prescreen Office Location*	MFY
Prescreen Program*	MLP -- Medical-Legal Partnership

All this information auto-populates

12. Here is a sample of what Page 2 might look like, depending on how you set up your forms:

MLP Referral Form -- Page 2	
MLP Patient Information	
Name (First*, Middle, Last*, 2nd Last/Suffix)	<input type="text" value="First Name*"/> <input type="text" value="Middle"/> <input type="text" value="Last Name*"/> <input type="text" value="Suffix"/>
DOB Status	Known
Date of Birth*	<input type="text" value="mm/dd/yyyy"/> Age: N/A
SSN Status	Known
Social Security #*	<input type="text"/>
Address Validation Status	Problem: Zip or City and State required.

Page Two, continued:

Enter the zip code and Legal Server will automatically find the city/county.

Street Address	<input type="text"/>
Address 2	<input type="text"/>
Apt#/Lot#	<input type="text"/>
City, State of Residence, Zip	City <input type="text"/> , NY <input type="text"/> Zip Code <input type="text"/>
County of Residence*	N/A <input type="text"/> <input checked="" type="checkbox"/> Inside Service Area <input type="checkbox"/> Outside Service Area <input type="checkbox"/> Outside State
Political Boundaries Lookup Status	
Home Phone	<input type="text"/>
Mobile Phone	<input type="text"/>
Additional Numbers	<input type="button" value="Show"/>
MLP: ICD-10 Category	Certain infectious and parasitic diseases (A00-B99)
MLP: ICD-10 Block	A00-A09 Intestinal infectious diseases <input type="text"/>
MLP: ICD-10 Diagnosis	Amoebiasis <input type="text"/>

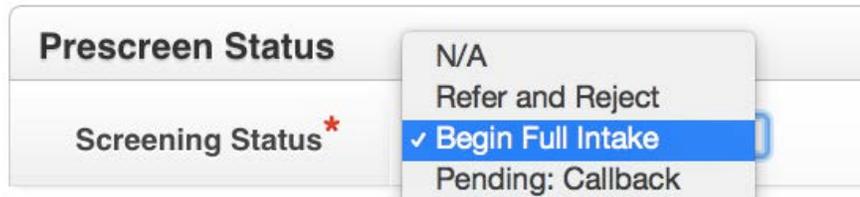
MLP Referring Provider Information

MLP: Date referral received	02/05/2016 <input type="button" value="Calendar"/>
MLP: Medical Institution Search for organizations by name	No Organization N/A <input type="text"/>
Medical Institution Department*	none <input type="text"/>

Search by name for an existing Contact or use the button below to create a new Contact record and set that person's litigation/case contact type to M

MLP Medical Provider Search for contacts by name	<input type="text"/>
	<input type="button" value="Create a new mip medical provider contact"/>
Legal Problem Code	Please Select <input type="text"/>
Special Legal Problem Code	

13. At the end of the process, the person entering the referral information will have the option to take one of several next steps, including immediately starting a full intake, marking the referral for a callback, or rejecting it.



14. If an intake is not immediately completed after the referral is entered, the referral information will show up on the prescreens section common to many Home Pages. Here is a sample of what it would look like if referrals had been entered for the Obama family:

MY CASES MY OUTREACHES MY RECENT ASSIGNMENTS MY INCOMPLETE INTAKES **MY PRESCREENS**

all 18 results

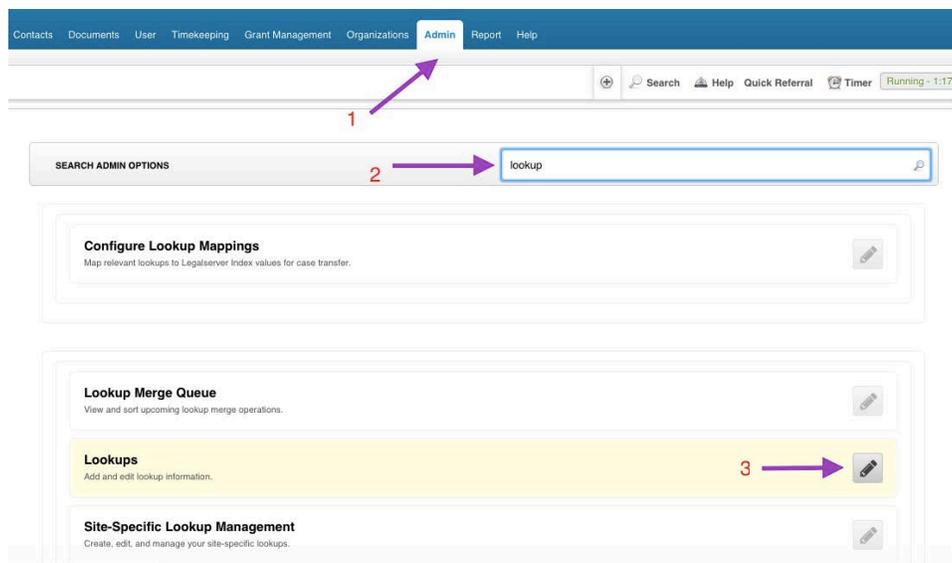
Matter/Case ID#	Name	Legal Problem Code	Special Legal Problem Code	Prescreen Date	Prescreen Intake User
16-0071762	Obama, Sasha	81 Immigration/Naturalization	81-02 U-Visa Petition	02/09/2016	Mallory Curran
16-0071761	Obama, Malia	75 SSI	75-07 SSI Continuing Disability Review	02/05/2016	Mallory Curran
16-0071760	Obama, Michelle	81 Immigration/Naturalization	81-05 Naturalization	02/05/2016	Mallory Curran
16-0071758	Obama, Barack	75 SSI	75-04 SSI Overpayment	02/05/2016	Mallory Curran

15. Clicking on the Matter/Case ID# will send the user to the MLP Referral Rec'd Profile View, from which the user can edit information and/or begin a full intake or reject the referral.

MLP-Legal Server Instruction Sheet #9: Setting Up MLP Consults in Outreaches (For Use with Checklist #9)

STEP ONE: Create an MLP Consult as an Outreach Type

1. Click on the Admin tab at the top of any LegalServer page.
2. Click on the Admin tab in LegalServer.
3. Type “lookup” into Search Admin Options.
4. Click anywhere on “Lookups.”



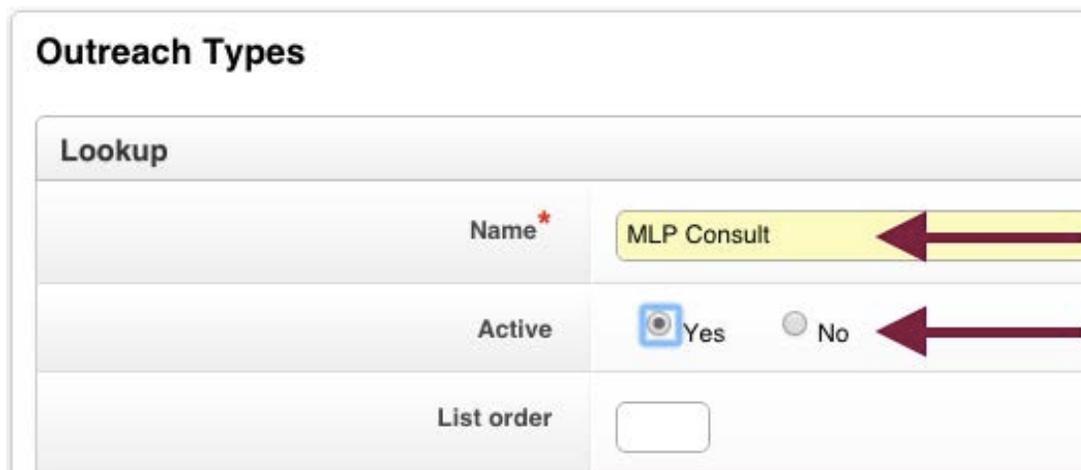
5. Click on the funnel icon. Then, click on Title, type in “outreach type” and then click Filter.



6. Click on Outreach Types.



7. Add "MLP Consult" and make sure it's active.

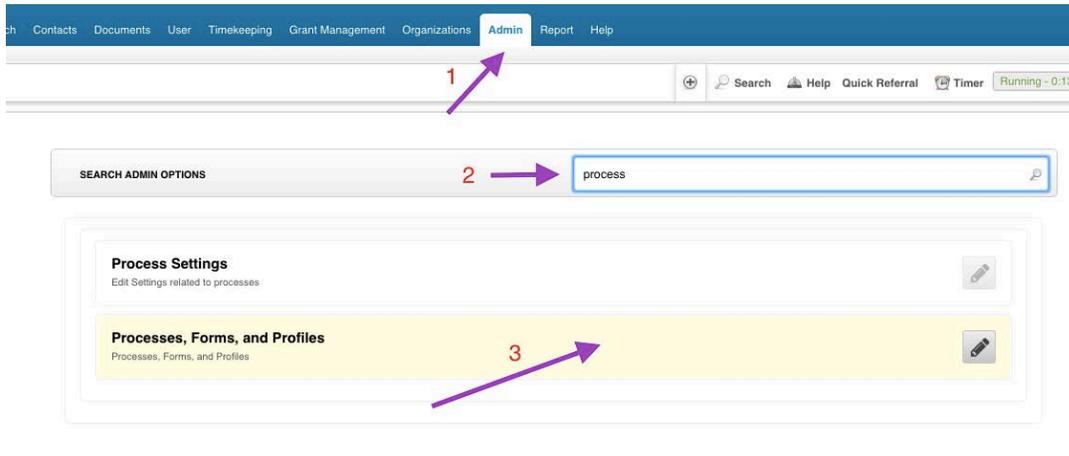


8. Click Continue.

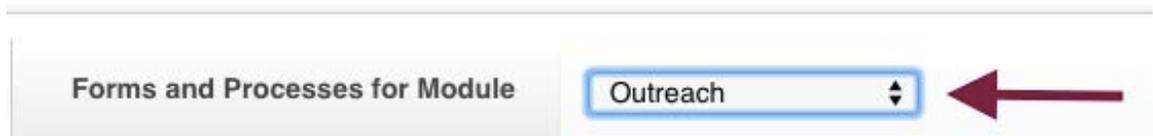
Continue »

STEP TWO: Create Branch Logic for MLP Consult

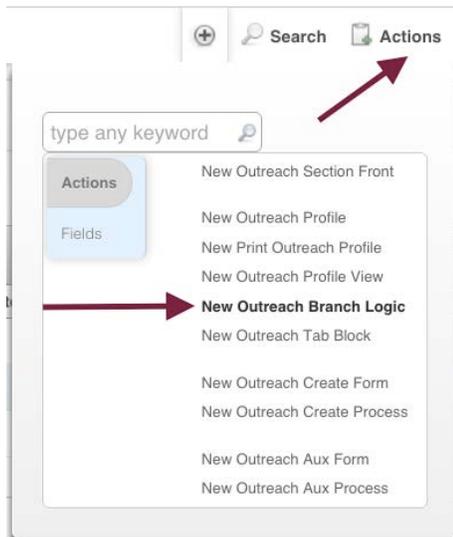
1. Click on the Admin tab at the top of any LegalServer page.
2. Type in “process” in the Search Admin Options box.
3. Click anywhere on “Processes, Forms, and Profiles.”



4. Change the Module to Outreach.



5. From Actions, click on New Outreach Branch Logic



- Complete the information in the Name & Description section. Name your Branch Logic something along the lines of “BL for Outreach Type = MLP Consult.” Mark it Active and do not add a Continue Button. Mark it Active and do not add a Continue Button.

Outreach Branch Logic

▼ Name And Description

Name*	ne Type = MLP Consul ←
Description	
Continue Button Text	
Skip This Form When Generating Process As PDF?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active*	<input checked="" type="radio"/> Yes <input type="radio"/> No ←
Add Continue Button*	<input type="radio"/> Yes <input checked="" type="radio"/> No ←
Configuration Notes	

- In the Forms Elements Section, add whichever fields and blocks you would like staff to complete when opening a new MLP Consult. *(Use completed Checklist #9 as your guide.)*

Below is a sample. (Note that your Branch Logic elements will vary not only based on what MLP information you want to collect, but also based on what other fields your legal services organization is already collecting for every Outreach that is opened in LegalServer.)

Enabled

- ▶ Header: MLP Consult Information
- ▶ Field: Date
- ▶ Field: Staff
- ▶ Field: Name
- ▶ Block: MLP Medical Institution
- ▼ Instruction: Enter the name ... a search.

Enter the name of the MLP medical partner staff person who requested the MLP Consult. You will need to have entered this person's name previously via Contacts for their

Text

Should these instructions be a specific number of lines tall?

Show these instructions inline

Show these instructions when hovered over

Use Large Text (for Hover)

Show line breaks

Format as HTML

Label Text
- ▶ Field: Contacts
- ▶ Field: MLP: Referral position type
- ▶ Field: MLP: Medical practice area
- ▶ Field: MLP: Medical Record Number
- ▶ Field: MLP: Patient Name
- ▶ Field: MLP: Patient Age
- ▶ Field: Zip Code
- ▶ Block: MLP ICD-10 Diagnosis
- ▶ Block: Problem Code/Special Problem Code
- ▶ Field: MLP: I-HELP Category

8. As always, you can customize the fields & blocks, for example by selecting default values, requiring a field, and/or showing the Date Picker.

Field: MLP: Referral position type

No Default

Value: Social Worker

Toggler style: Dropdown Menu

Empty Text: Please Select

Default Overrides Existing Value

Label: [text input]

Right of last

Required

Bold

Hidden

Read-Only

Field: Date

No Default

Value: mm/dd/yyyy

Today

Yesterday

Show Date Picker

Min Date: 01/01/2016

Max Date: 12/31/2050

Field: Staff

No Default

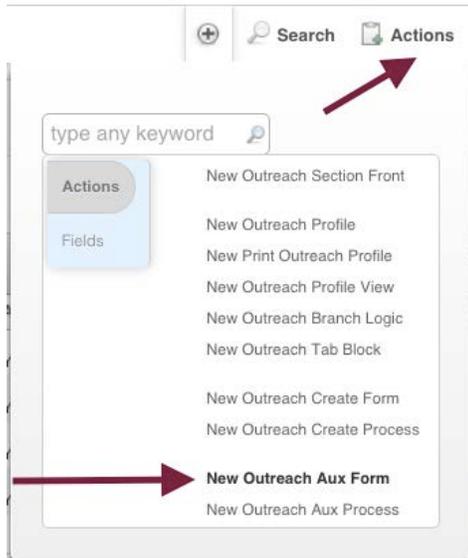
Current User

9. Once you're done adding and customizing your form elements, click Continue.

Continue »

STEP THREE: Creating ICD-10 Form & Process (only necessary if you are tracking ICD-10 information in Outreaches).

1. From the Process, Forms & Profiles page, hover over Actions and click on New Outreach Aux Form.



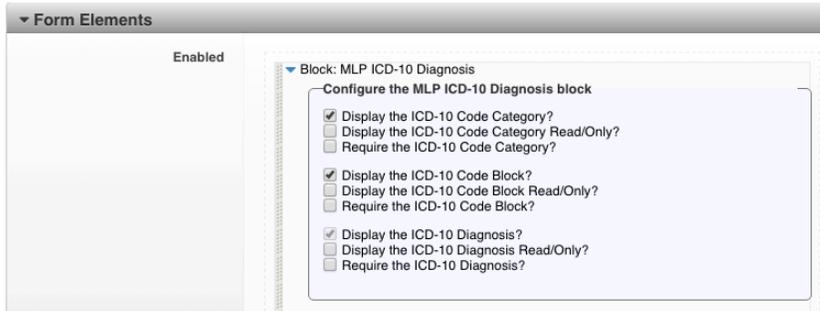
2. Name your Outreach something along the lines of Edit MLP ICD-10 Diagnosis.

Mark it active and add a Continue button. Make sure Outreach Aux is selected for Process Type.

A screenshot of the "Outreach Aux Form" configuration page. The page has a header "Outreach Aux Form" and a sub-header "Name And Description". Below the sub-header are several form fields and options:

- Name***: A text input field containing "Edit MLP ICD-10 Diagn". A red arrow points to this field.
- Description**: An empty text input field.
- Continue Button Text**: An empty text input field.
- Skip This Form When Generating Process As PDF?**: Radio buttons for "Yes" and "No", with "No" selected.
- Active***: Radio buttons for "Yes" and "No", with "Yes" selected. A red arrow points to this field.
- Add Continue Button***: Radio buttons for "Yes" and "No", with "Yes" selected. A red arrow points to this field.
- Process Types***: A dropdown menu with the text "Hold down the control key (CTRL) to select more than one option." and a list of options: "Outreach Aux", "Outreach Create", and "Outreach Tab Block". A red arrow points to the "Outreach Aux" option.

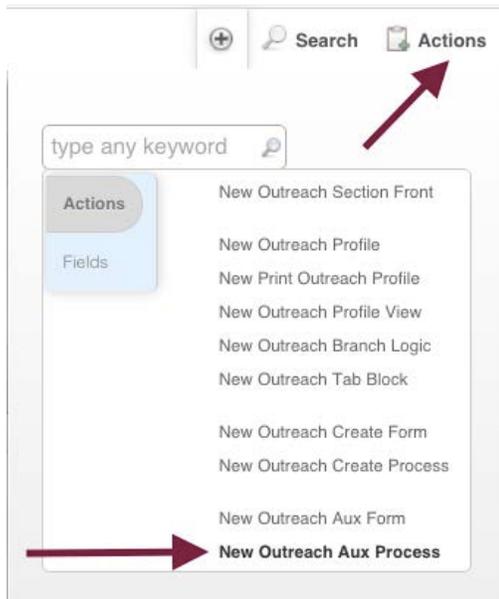
3. In Form Elements, add the MLP ICD-10 Block and customize it as you wish.



4. Click on Continue.



5. From the Process, Forms & Profiles page, hover over Actions and click on New Outreach Aux Process.



6. Name your process something like Edit MLP ICD-10 Diagnosis.

Attributes	
Name *	<input type="text" value="Edit MLP ICD-10 Diagn"/>
Complete	<input checked="" type="radio"/> Yes <input type="radio"/> No
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Process Link in Module Static Profile	<input type="radio"/> Yes <input type="radio"/> No
Process Description	<input type="text"/>

You can set permissions after creating this process.

7. Move your Edit MLP ICD-10 Diagnosis form into the Enabled Forms section.

Enabled Forms	<input type="checkbox"/> Edit MLP ICD-10 Diagnosis [Edit]
Disabled Forms (only active forms are displayed)	<input type="checkbox"/> MFY Outreach (Page 1) [Edit] <input type="checkbox"/> Associate Case to Outreach [Edit] <input type="checkbox"/> MFY Outreach (Page 2) [Edit]
Followup Profile	Main Profile

8. Click Continue.

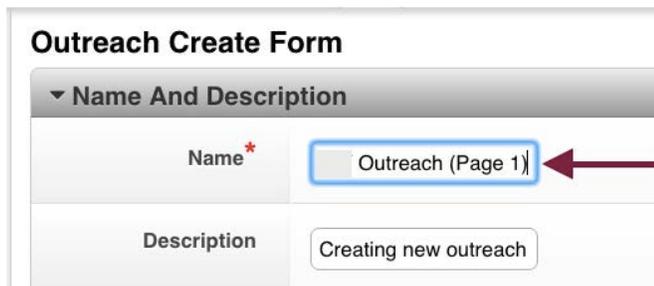
Continue »

STEP THREE: Adding the MLP Consult Branch Logic to the Create New Outreach Form.

1. From the Process, Forms & Profiles page, find the form your organization uses to create a new Outreach, and click on the pencil icon to edit it.



2. If your organization's Outreach does not already have a two-page Outreach form, you will need to create a second form for a second page. (You need to do this because the MLP Consult information contains blocks, and blocks do not function properly on the first page of "create" forms, including for Outreaches, Prescreens, and Intakes.)
3. If your organization only has one Outreach form, rename it by adding a "(Page 1)" to the end of the name.



4. Here is a sample of what Page 1 might look like.

Enabled

- ▶ Header: Outreach
- ▶ Field: Date
- ▶ Field: Date Entered
- ▼ Instruction: "NAME" should be ... nference")
"NAME" should be the title of the outreach file (e.g., "Lobbying for Bill A01234" or "Medicaid CLE for Statewide Conference")

Text

Should these instructions be a specific number of lines tall?

Show these instructions inline
 Show these instructions when hovered over
 Use Large Text (for Hover)
 Show line breaks
 Format as HTML

Label Text

- ▶ Field: Name
- ▶ Field: Funding Code
- ▶ Field: Staff
- ▶ Field: Active
- ▶ Field: Outreach Status
- ▶ Field: Notes
- ▶ Field: Office Location
- ▶ Field: Programs

5. Click Continue.

Continue »

6. Returning to the Processes, Forms, and Profiles page, hover over Actions and then choose New Outreach Create Form.

⊕ Search Actions

type any keyword

Actions

- New Outreach Section Front
- New Outreach Profile
- New Print Outreach Profile
- New Outreach Profile View
- New Outreach Branch Logic
- New Outreach Tab Block
- New Outreach Create Form**
- New Outreach Create Process
- New Outreach Aux Form
- New Outreach Aux Process

Fields

- In the Name & Description section, name the form the same thing as the first page, but end it with “(Page 2)”.

Do not create a new process, but click Yes for Active and Add Continue Button.

Select all three options for Process Types.

Outreach Create Form

▼ Name And Description

Name* Outreach (Page 2)

Description

Create New Process Containing This Form? Yes No

Continue Button Text

Skip This Form When Generating Process As PDF? Yes No

Active* Yes No

Add Continue Button* Yes No

Process Types*
Hold down the control key (CTRL) to select more than one option.

Outreach Aux
Outreach Create
Outreach Tab Block

- Add a header and name it something like Additional Information Based on Outreach Type.

▼ Form Elements

Enabled

▼ Header: Information Bas ... reach Type
Text | Information Based on Outreach Type
Contains HTML Yes

Help Hover

Help Expanded

Special Formatting Special (Do Not Remove)

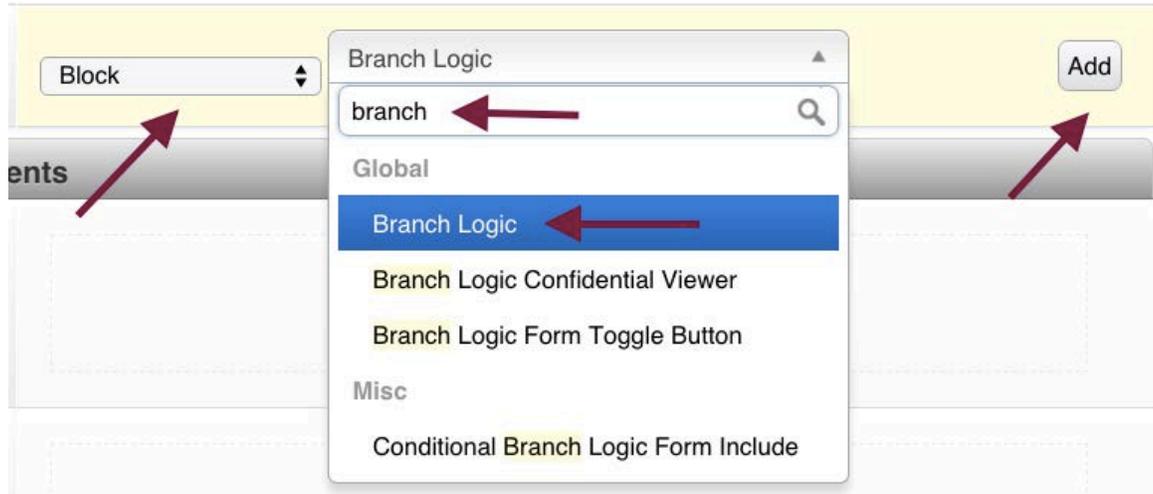
▼ Instruction: Complete the in ... Continue.
Complete the information below based upon the Outreach Type you have selected
If no additional information appears, simply click on Continue

Text

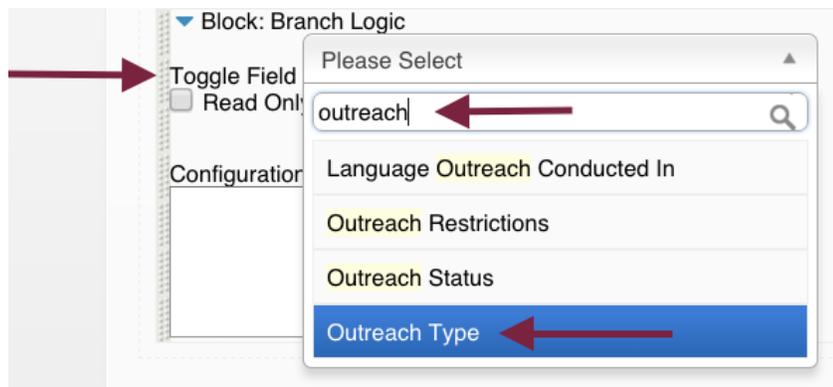
Should these instructions be a specific number of lines tall?

Show these instructions inline
 Show these instructions when hovered over
 Use Large Text (for Hover)
 Show line breaks
 Format as HTML

9. Add a Branch Logic Block.



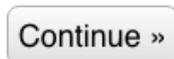
10. For the toggle field, choose Outreach Type.



11. For the MLP Consult option, choose BL for Outcome Type = MLP Consult. (If you have other branch logic based on other Outreach Types, select the appropriate branch logic for them, as well.)



12. Click Continue.



STEP FOUR: Adding your Page 2 Form to the Create New Outreach process.

1. From the Processes, Forms, & Profiles page, click on the pencil icon next to your organization's Create New Outreach process.

Forms and Processes for Module: Outreach

ACTIVE = Yes

Name	Type	Process Description	Steps	Complete	Active	Followup Profile	Color Scheme	Last Save
Associate Case to Outreach	Outreach Aux	N/A	1	Yes	Yes	N/A	Blue	N/A
Create New Outreach	Outreach Create	N/A	1	Yes	Yes	Outreach Standard Profile	Blue	N/A
Edit Outreach	Outreach Aux	N/A	1	Yes	Yes	N/A	Blue	N/A

No Other Pages

2. In the Forms section, both pages of your outreach forms should appear. Grab the Page 2 by the gray bar next to the blue triangle and move it up into the Enabled Forms section under Page 1.

Enabled Forms

- Outreach (Page 1) [Edit]
- Outreach (Page 2) [Edit]

Disabled Forms (only active forms are displayed)

Followup Profile: Outreach Standard Profile

3. Click Continue.

Continue »

- Return to the Processes, Forms, & Profiles page, and click on the pencil icon next Edit Outreach.



- In the Forms section, both pages of your outreach forms should appear. Grab the Page 2 by the gray bar next to the blue triangle and move it up into the Enabled Forms section under Page 1.



- Click Continue.



7. Now is a good time to test out your Outreach by trying to create a new one. Here's an example of what Page 1 could look to the case handler:

Outreach	
Date of Outreach or Date Project Began *	<input type="text" value="02/29/2016"/>
"NAME" should be the title of the outreach file (e.g., "Lobbying for Bill A01234" or "Medicaid CLE for Partnership Conference")	
Name *	<input type="text" value="Leap Day MLP Consult"/>
Funding Code *	<input type="text" value="08- MHLP (CSS)"/> <input type="checkbox"/> Show All Funding Codes
Staff * Search for users by name or login	Test User [Remove] <input type="text"/>
Active *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Status *	<input type="text" value="Active"/>
Notes	<input type="text"/>
Project *	<input type="text" value="MLP -- Medical-Legal Partnership"/>

8. And here's what Page 2 could look like to the case handler if she or he chooses MLP Consult for Outreach Type.

Additional Information Based on Outreach Type

Outreach Type*
 Coalition or Task Force
 Collaboration with Outside Agency
 Fundraising
 Legal Back-Up to Sister Organization
 Lobbying - City
 Lobbying - Federal
 Lobbying - State
 Meeting with Elected Official (not lobbying)
 Meeting with Government Agency
MLP Consult

MLP Consult Information

Date* 02/29/2016

Staff* Test User [\[Remove\]](#)
Search for users by name or login

Name* Leap Day MLP Consult

MLP: Medical Institution
Search for organizations by name
 Metro General Medical Center
 1234 Busy Town Drive
 BusyTown, OH 43210

Medical Institution Department* Community Health Center

Enter the name of the MLP medical provider's staff person who requested the MLP Consult. You will need to have entered this person's name previously via Contact for it to show up as an option.

Contacts
Search for contacts by name
 Megan Sandel MD [\[Remove\]](#)

MLP: Referral position type Physician (Attending)

MLP: Medical practice area Psychiatry

MLP: Medical Record Number unknown

MLP: ICD-10 Category Diseases of the blood and blood-forming organs and certain disorders involving the immune mechanism (D50-D89)

MLP: ICD-10 Block D50-D53 Nutritional anemias

MLP: ICD-10 Diagnosis Iron deficiency anaemia

Legal Problem Code* 74 74 SSDI

Special Problem Code 74-06 74-06 SSD Employment

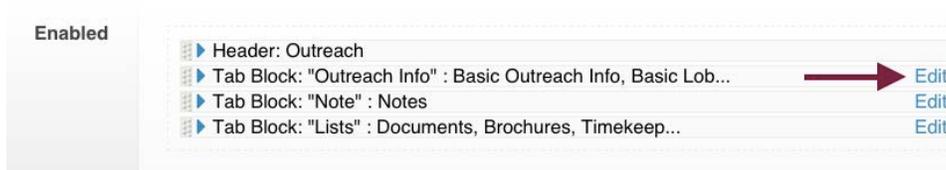
MLP: I-HELP Category Income & Insurance

STEP FIVE: Adding an MLP Consult tab to your Outreach Profile View.

1. From Processes, Forms, & Profiles, set the Module to Outreach, click on Profiles and then select your organization's Outreach Standard Profile. (It may have a different name.)



2. Click on the Edit button next to your Outreach Info Tab Block (which may have a different name.)



3. Build the MLP Consult tab however you'd like. A sample is below. Don't forget to customize (e.g., show date picker, make editable, set minimum number.)



4. Click Continue.

Continue »

5. Here is what this Profile View would look like to the case handler:

Outreach

BASIC OUTREACH INFO LOBBYING INFO PRESENTATION, CLE, ETC. INFO **MLP CONSULT** MLP FACILITATED REFERRAL

Basic MLP Consult Info

Database ID	53
Title of MLP Consult	Leap Day MLP Consult
Outreach Type	MLP Consult
Date MLP Consult Initiated	02/29/2016
Staff	Mallory Curran
Funding Code	08- MHLP (CSS)
Programs	MLP -- Medical-Legal Partnership

MLP Medical Institution [EDIT]

MLP: Medical Institution	Metro General Medical Center 1234 Busy Town Drive BusyTown, OH 43210
Medical Institution Department	Community Health Center
Contacts	Megan Sandel MD
MLP: Referral position type	Physician (Attending)
MLP: Medical practice area	Psychiatry
MLP: Medical Record Number	unknown

MLP Patient Info

MLP: Patient Name	unknown
MLP: Patient Age	42
Zip Code	43210

MLP ICD-10 Diagnosis [EDIT]	
MLP: ICD-10 Category	Mental, behavioral and neurodevelopmental disorders (F01-F99)
MLP: ICD-10 Block	F30-F39 Mood (affective disorders)
MLP: ICD-10 Diagnosis	Bipolar affective disorder

Problem Code/Special Problem Code [EDIT]	
Legal Problem Code	74 74 SSDI
Special Problem Code	74-06 74-06 SSD Employment
MLP: I-HELP Category	Income & Insurance

MLP Consult "Closing" Information	
MLP: Summary for medical record	See email in notes below
Matter Reporting Code	104: Legal education for lay service providers
Outreach Status	Ready to Close
Active (aka Open)	Yes
Good Story	Yes

NOTES

Notes

Show Filters

Email: RE: information on SSD & employment (General Notes)
 Posted on 03/02/2016 by System User - [Delete](#)

From: Mallory Curran <mallory@mallorycurran.com>

Dear MLP Attorney,

Thank you so much for the information you emailed to me. It was really helpful -- I shared the Fact Sheet with the patient. She's really excited that she can work and get SSD at the same time. She's ready to take the step was but nervous about losing her benefits.

Sincerely,

Dr. Smith

Email: information on SSD & employment (General Notes)
 Posted on 03/02/2016 by System User - [Delete](#)

From: Mallory Curran <mallory@mallorycurran.com>

Dear Dr. Smith,

Thank you so much for getting in touch about your patient's question related to working while receiving SSD.

YES, it is definitely possible to work while receiving SSD. There are a number of rules, though, and it would be helpful if your patient was familiar with them. (You, too!) I have attached a helpful Fact Sheet -- Working While Getting SSD: The Basics.

Please let me know if you have any additional questions.

Sincerely,
 MLP Attorney

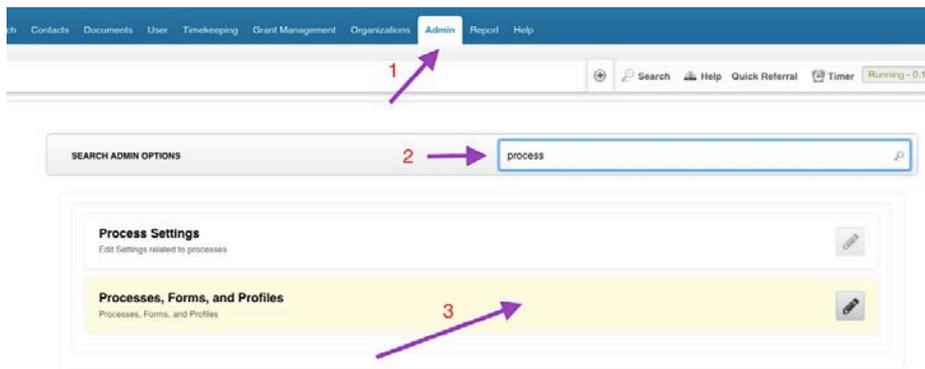
Documents Attached:

Name	Title	Size	Actions
THE-BASICS-SSD-2015-REV.pdf	THE-BASICS-SSD-2015-REV.pdf	36.25 kiB	Download

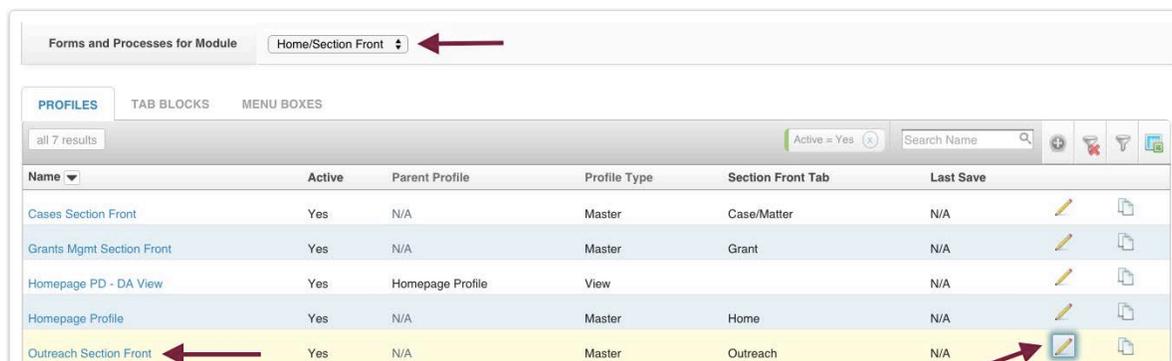
STEP SIX (Optional): Adding MLP Consults to the Outreach Section Front.

If you'd like to be able to view a list of all MLP Consults from the first page you see after clicking the Outreach tab on the blue bar, you can add a special tab to the Outreach Section Front.

1. Click on the Admin tab at the top of any LegalServer page.
2. Type in "process" in the Search Admin Options box.
3. Click anywhere on "Processes, Forms, and Profiles."



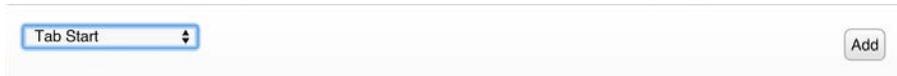
4. Change the Module to Home/Section Front, and then click on the pencil icon to the right of the Outreach Section Front.



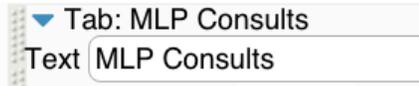
5. Click on the Edit next to the Tab Block.



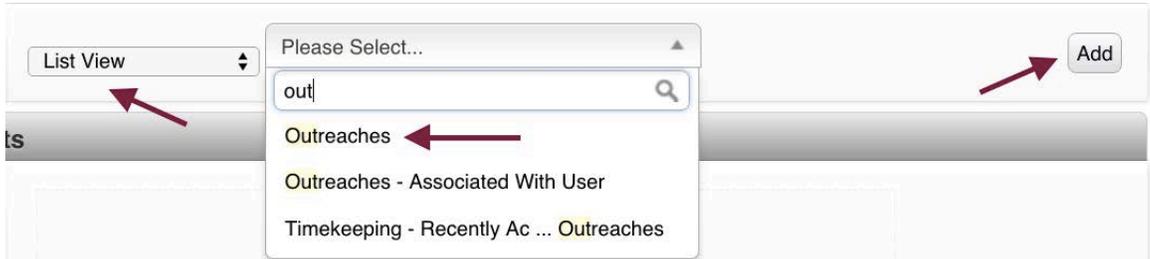
6. Add a Tab Start.



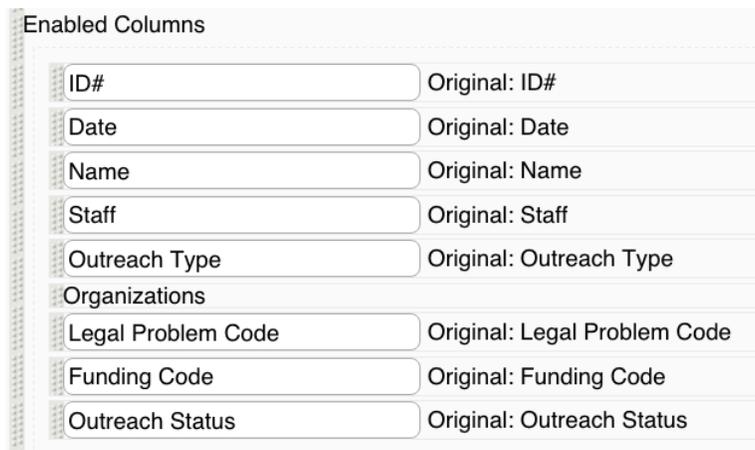
7. Title it MLP Consults.



8. Add a List View, choosing Outreaches from the dropdown menu.



9. Click on the blue triangle to the left of the List View, and then choose the columns you'd like to see in your List View by moving them from Disabled Columns to Enabled Columns. A sample is below.



10. Click on the Enable Custom Default Filters button.



- Choose whatever filters you'd like added, and be sure to choose MLP Consult from Outreach Types.

ID #
 Date Entered Value
 Name
 Active
 Hold down the control key (CTRL) to select more than one option.
 N/A
 No
 Yes
 Outreach Status
 Subject
 Office Location
 Legal Problem Code
 Outreach Type
 Matter Reporting Code
 Funding Code

- Click Continue.

Continue >>

- Test out your new Section Front by clicking on the Outreach tab.

Clinics Home Cases Calendar **Outreach** Contacts Documents User Timekeeping Grant Management Organizations Admin Report Help
 Home > Outreach > Outreach Section Front
 Search Actions Help Quick Referral Timer Running
 OUTREACH MY OUTREACHES RECENTLY ACCESSED OUTREACHES TRAININGS **MLP CONSULTS**
 all 4 results Outreach Type = MLP Consult Active = Yes Search Name

ID#	Date	Name	Staff	Outreach Type	Legal Problem Code	Outreach Status	Funding Code
55	03/02/2016	Resident Diaz Q re: homelessness & elementary students	Mallory Curran	MLP Consult	14 Access (Including Bilingual, Residency, Testing)	Active	XX Testing Fund
54	03/02/2016	SW Jones: Q re: U visas	Christopher Schwartz	MLP Consult	81 Immigration/Naturalization	Active	XX Testing Fund
53	02/29/2016	Leap Day MLP Consult	Test User	MLP Consult	74 SSDI	Ready to Close	08-MLP (CSS)
42	11/03/2015	MLP Case Consult	Mallory Curran	MLP Consult	75 SSI	Active	XX Testing Fund

 No Other Pages

- You're done!

SOME QUICK NOTES ON OUTREACHES

- Emailing Outreaches. It is possible to email an Outreach the same way one can email a case. The template for emails is outreach-[ID#]@[yourorg].legalserver.org. Therefore, if I wanted to email the Outreach designated database ID #53 for an organization called ABCorg, the email address would be outreach-53@ABCorg.legalserver.org.
- Outreaches cannot officially be “Open” or “Closed.” They are either Active or Inactive. Some organizations help manage by using the Outreach Status with options including Open, Ready to Close, and Closed by Supervisor.

MLP-Legal Server Instruction Sheet #10: Tracking MLP Facilitated Referrals

Tracking MLP Facilitated Referrals in LegalServer

There is no one best way to track MLP Facilitated Referrals in LegalServer, and each MLP will need to have a conversation about whether, how and where to track them. *See Flowchart #10 to help determine what might work best for your organization.*

Below is a description of the options listed in the gray boxes on Flowchart #10.

OPTION ONE: Track Facilitated Referrals via Prescreen

Many organizations already track referrals to outside organizations through a Prescreen process via the “Refer & Reject” screening status option/form.

LegalServer administrators could add the “MLP: Outcome of Facilitated Referral” field or a simple branch logic to the existing Prescreen or develop a special MLP Facilitated Referral Prescreen. *(See Instruction Sheet #8 for background on setting up a Prescreen.)*

OPTION TWO: Track MLP Facilitated Referrals via Outreaches

Some organizations may wish to completely separate Facilitated Referrals from the LegalServer case/matter module for audit-related or other reasons. *(See Instruction Sheet #9 for background on setting up MLP Facilitated Referral as a new Outreach type.)*

OPTION THREE: Track MLP Facilitated Referrals via Cases (and record referral from within cases)

Many MLP Facilitated Referrals will include the provision of a limited amount of legal advice prior to the referral being made. (For example, “because you were the victim of a violent crime, filed a police report, and spoke with prosecutors about what happened, you are likely eligible for a U-visa. A U-

visa is...”) When the Facilitated Referral involves both advice and the referral, MLPs may wish to track through a case, 1) using their existing MLP forms and profiles and 2) recording the referral to the outside organization directly from the case.

LegalServer administrators could add the “MLP: Outcome of Facilitated Referral” field or simple branch logic to the MLP Intake (*Instruction Sheet #4*) and Special Program/Edit MLP Info (*Instruction Sheet #7*) forms and/or the MLP Profile View (*Instruction Sheet #6*).

To record a referral directly from a case, use the “Search for Referral Organization” option from the Actions menu.

OPTION FOUR: Track MLP Facilitated Referral via “MLP: Outcome of Facilitated Referral” field in a case (advice given but specific organization the patient was referred to not recorded)

This option is identical to Option Three, but skips recording a referral to a specific organization.

OPTION FIVE: Track MLP Facilitated Referrals via Refer & Reject (no advice given)

This option is similar to Option One, but is done from an incomplete intake or a case that was opened instead of a Prescreen.

From an Incomplete Intake, choose the “Refer and Reject Application” option from the Actions menu. LegalServer Administrators will want to add the “MLP: Outcome of Facilitated Referral” field or simple branch logic to the Reject Application form.

From a case, choose the “Reject Case” option from the Actions menu. LegalServer Administrators will want to add the “MLP: Outcome of Facilitated Referral” field or simple branch logic to the Edit Reject Case form. Many sites will be able to choose the “Search for Referral Organization” option from the sidebar after the case has been rejected.

MLP-Legal Server

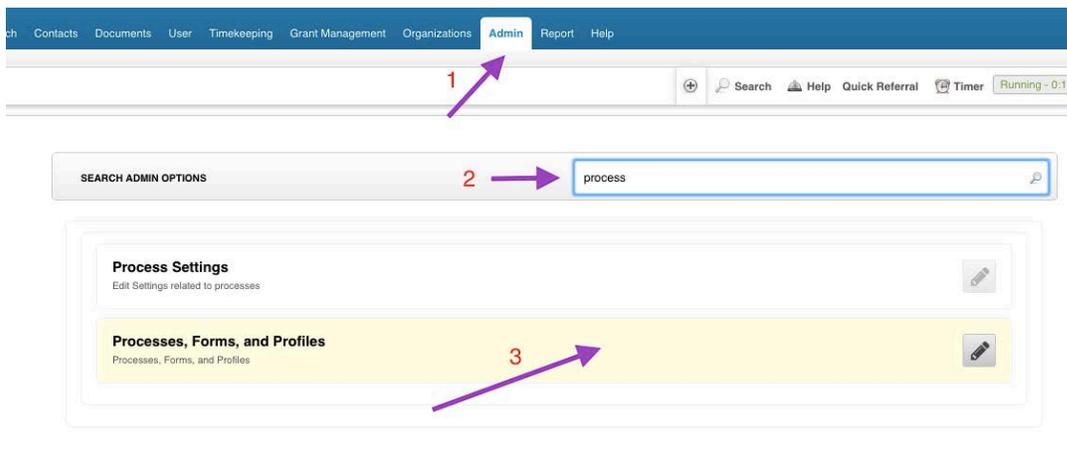
Instruction Sheet #11: Setting Up MLP Trainings in Outreaches

(For Use with Checklist #11)

These instructions assume that your organization already tracks trainings in the Outreach module. They provide guidance on adding MLP information to an existing trainings set-up. Your organization could also choose to create a special MLP Training Outreach Type.

STEP ONE: Create Branch Logic for MLP Trainings

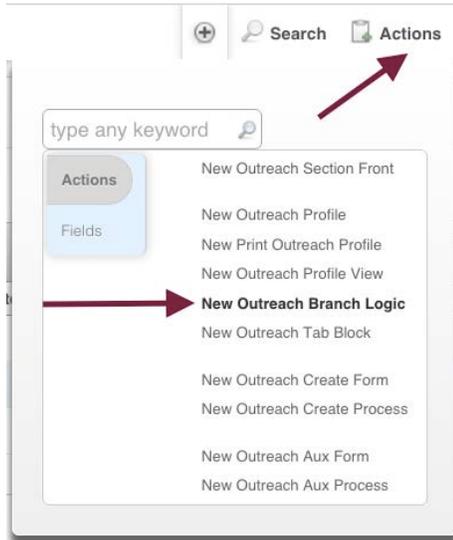
1. Click on the Admin tab at the top of any LegalServer page.
2. Type in “process” in the Search Admin Options box.
3. Click anywhere on “Processes, Forms, and Profiles.”



4. Change the Module to Outreach.



- From Actions, click on New Outreach Branch Logic.



- Complete the information in the Name & Description section. Name your Branch Logic something along the lines of “BL for MLP Training = yes.” Mark it Active and do not add a Continue Button.

▼ Name And Description	
Name*	BL MLP Training = yes ←
Description	<input type="text"/>
Continue Button Text	<input type="text"/>
Skip This Form When Generating Process As PDF?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Active*	<input checked="" type="radio"/> Yes <input type="radio"/> No ←
Add Continue Button*	<input type="radio"/> Yes <input checked="" type="radio"/> No ←

- In the Forms Elements Section, add whichever fields and blocks you would like staff to complete when opening a new MLP Consult. (Use Checklist #11 to guide you.)

Below is a sample Form Elements Section. (Note that your Branch Logic elements will vary not just based on what MLP information you want to collect, but also based on what other fields your legal services organization is already collecting for every Training Outreach.)

- ▶ Header: MLP Training Information
- ▶ Block: MLP Medical Institution
- ▶ Field: Date
- ▶ Field: Date Entered
- ▶ Field: Staff
- ▶ Field: MLP: Title of Praining / Presentation
- ▶ Field: Legal Problem Code
- ▶ Field: Special Problem Code
- ▶ Field: MLP: I-HELP Category
- ▶ Field: MLP: Medical practice area
- ▶ Field: Number of Attendees (Actual)
- ▶ Field: Number of Attendees (Estimated)
- ▶ Field: MLP: Attendee Position Type(s)
- ▼ Field: Contacts
 - No Default
 - Value:
Search for contacts by name
 - Force single-selection
 - Default Overrides Existing Value
 - Label
 - Right of last
 - Required
 - Bold
 - Hidden
 - Read-Only
- ▶ Field: Outreach Status
- ▶ Field: Active

8. As always, you can customize the fields & blocks, for example by selecting default values, requiring a field, and/or showing the Date Picker.

Field: MLP: Medical practice area
 No Default
 Value: Oncology

A red arrow points to the 'Oncology' dropdown menu.

Field: Date
 No Default
 Value: mm/dd/yyyy
 Today
 Yesterday
 Show Date Picker
Min Date 01/01/2016
Max Date 12/31/2050

Red arrows point to 'Today', 'Show Date Picker', and the 'Max Date' field.

Field: Staff
 No Default
 Current User

A red arrow points to the 'Current User' radio button.

9. Once you're done adding and customizing your form elements, click Continue.

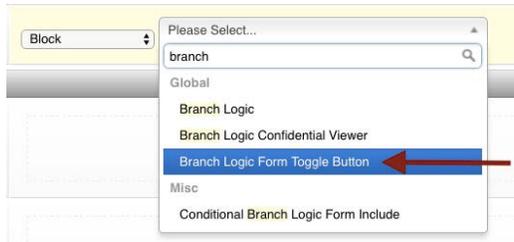
Continue »

STEP TWO: Adding the MLP Consult Branch Logic to an Existing Training Form.

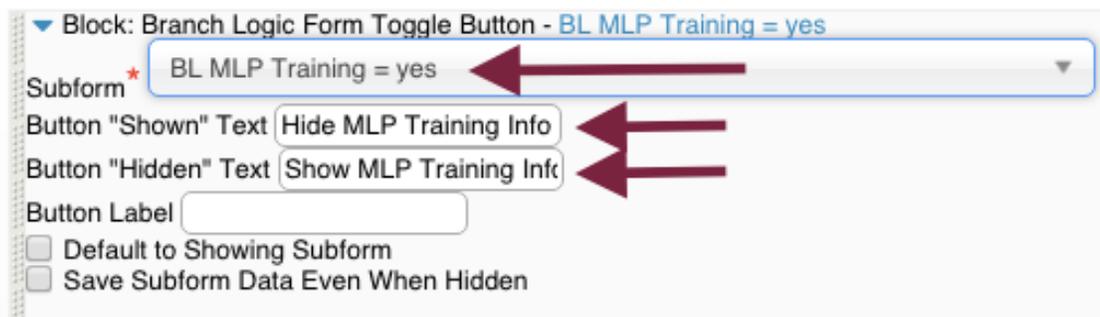
1. From the Process, Forms & Profiles page, find the Branch Logic form your organization uses for “Outreach Type = Training” (it may have a slightly different name). Click on the pencil icon.

Name	Description	Active	Form Types	Last Save
BL for Outcome Type = MLP Consult	N/A	Yes	Outreach Branch Logic	03/06/2016 at 2:25 PM
BL for Outreach Type = MLP Facilitated Referral	N/A	Yes	Outreach Branch Logic	03/08/2016 at 2:56 PM
BL MLP Training = yes	N/A	Yes	Outreach Branch Logic	03/08/2016 at 3:31 PM
BL Outreach Type = Coalition, Task Force, or Collaboration	branch logic for Coalition, Task Force, or Collaboration	Yes	Outreach Branch Logic	N/A
BL Outreach Type = Legal back-up to Sister Organization	branch logic for Legal back-up to Sister Organization	Yes	Outreach Branch Logic	N/A
BL Outreach Type = Lobbying (Federal, State, or City)	branch logic for outreach type = lobbying	Yes	Outreach Branch Logic	N/A
BL Outreach Type = Meeting with Elected Official (not lobbying)	branch logic for Meeting with Elected Official (not lobbying)	Yes	Outreach Branch Logic	N/A
BL Outreach Type = Presentation, Training, CLE, outreach, or off-site clinic	branch logic for presentation, training, or CLE, outreach, or off-site clinic	Yes	Outreach Branch Logic	03/08/2016 at 3:38 PM

2. Add a Branch Logic Form Toggle Button.



3. Choose your BL MLP Training = yes branch logic. Add “Shown” & “Hidden” text (note that these are counterintuitive – you’ll include the word “Hide” in the “Shown” text and “Show” in the “Hidden” text.)



4. Click Continue.

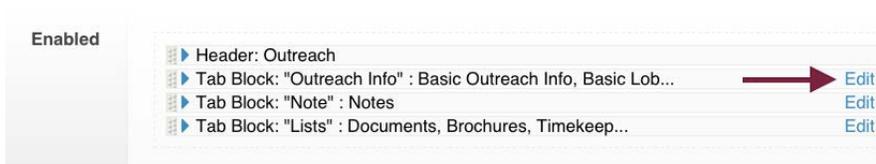
Continue »

STEP THREE: Adding MLP Training info to your Outreach Profile View.

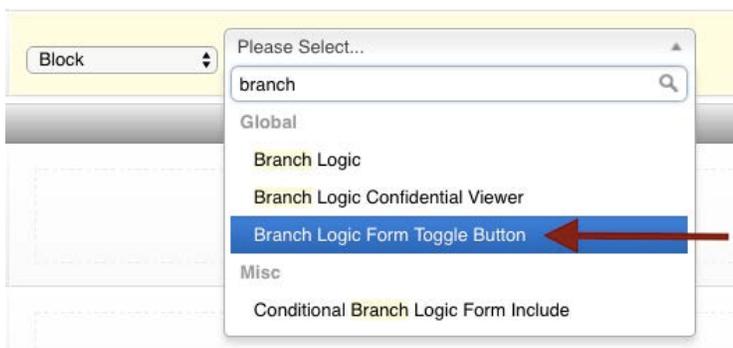
1. From Processes, Forms, & Profiles, set the Module to Outreach, click on Profiles and then select your organization's Outreach Standard Profile. (It may have a different name.)



2. Click on the Edit button next to your Outreach Info Tab Block (which may have a different name.)



3. Add the MLP Training = yes branch logic to the existing Trainings tab (assuming you have one). I suggest adding it via a Branch Logic Toggle Button.



▼ Block: Branch Logic Form Toggle Button - BL MLP Training = yes

Editable? Start Aux Process None

Subform * BL MLP Training = yes

Button "Shown" Text Hide MLP Training Info

Button "Hidden" Text Show MLP Training Info

Button Label

Default to Showing Subform

Save Subform Data Even When Hidden

4. Click Continue.

Continue »

5. Here is what this Profile View would look like to the case handler:

Outreach

BASIC OUTREACH INFO LOBBYING INFO **PRESENTATION, CLE, ETC. INFO** MLP CONSULT MLP FACILITATED REFERRAL

[your organization's Training info here]

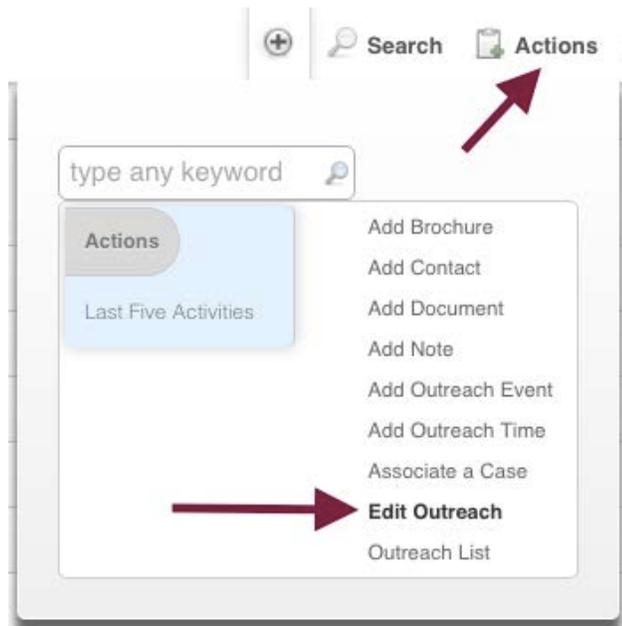
Hide MLP Training Info

MLP Training Information	
MLP: Medical Institution	MetroHealth Medical Center 2500 MetroHealth Drive Cleveland, OH 44113
Medical Institution Department	MH - Family Medicine
Date of MLP Training	03/09/2016
Date Entered	03/11/2016
Staff who Conducted Presentation	Mallory Curran
MLP: Title of Training / Presentation	Test MLP Training
Legal Problem Code	01 Bankruptcy/Debtor Relief
Special Problem Code	01-02 Chapter 13 Bankruptcy
MLP: I-HELP Category	Income & Insurance
MLP: Medical practice area	Family Practice
Number of Attendees (Actual)	17
Number of Attendees (Estimated)	N/A
MLP: Attendee Position Type(s)	Financial Counselor Medical Student Nurse Practitioner Physician (Attending) Physician (Resident) Social Worker
Names of Attendees	N/A

Outreach Status: Active

Active* Yes No

- Note that the downside to using a MLP Training branch logic added to your existing training information is that your end users will need to “Edit Outreach” in order to edit information after the Outreach has been created. You cannot set the branch logic info to be editable from the Outreach Profile View.



SOME QUICK NOTES ON OUTREACHES

- Emailing Outreaches. It is possible to email an Outreach the same way one can email a case. The template for emails is outreach-[ID#]@[yourorg].legalserver.org. Therefore, if I wanted to email the Outreach designated database ID #53 for an organization called ABCorg, the email address would be outreach-53@ABCorg.legalserver.org.
- Outreaches cannot officially be “Open” or “Closed.” They are either Active or Inactive. Some organizations help manage by using the Outreach Status with options including Open, Ready to Close, and Closed by Supervisor.

List of MLP Fields, Blocks, and List Views Available in LegalServer (as of July 1, 2016)

Fields & Accompanying Lookups

Case/Matter Module:

- MLP Medical Practice Area (Dropdown Single-Select); Lookup = MLP Medical Practice Area
- MLP Date Referral Rec'd (date field)
- MLP Date Referral Confirmed (date field)
- MLP Referral Position Type (Dropdown Single-Select); Lookup = MLP Referral Position Type
- MLP Is the client the patient referred? (Yes/No)
- MLP Relationship of client to patient referred (Dropdown Single Select); Lookup MLP Relationship of client to patient referred
- MLP Medical Record Number (text)
- MLP Patient SDOH Risk Categories -- (multi-select); Lookup = MLP Patient SDOH Risk Categories
- MLP # of ED visits in the past year (patient report) (number -- limit to 2 digits)
- MLP # of hospitalizations in the past year (patient report) (number -- limit to 2 digits)
- MLP Is the patient pregnant (at intake)? (Yes/No)
- MLP If patient is pregnant, how many weeks? (numeric -- limit to 2 digits)
- MLP Is the patient post-partum (at intake)? (Yes/No)
- MLP If patient post-partum, how many months? (numeric -- limit to 2 digits)
- MLP I-HELP Category (dropdown/single-select); Lookup = MLP I-HELP Category
- MLP Outcome of Referral Rec'd from Health Care Site (dropdown/single-select); Lookup = MLP Outcome of Referral Rec'd from Health Care Site
- MLP Output for Health Care Partner (multi-select); Lookup = MLP Output for Health Care Partner
- MLP Summary for Medical Record (Text Area)

Outreach Module:

- MLP Medical Practice Area (Dropdown Single-Select); Lookup = MLP Medical Practice Area
- MLP Referral Position Type (Dropdown Single-Select); Lookup = MLP Referral Position Type
- MLP Patient Name (Text -- not separated into first, last etc.)
- MLP Patient Age (Number -- Limit to 3 digits)
- MLP Medical Record Number (text)
- MLP I-HELP Category (Dropdown Single-Select); Lookup = MLP I-HELP Category
- MLP Summary for Medical Record (Text Area)
- MLP Title of Training / Presentation (Text)
- MLP Attendee Position Type(s) (multi-select); Lookup = MLP Attendee Position Type(s)
- MLP: Date Referral Confirmed (date)
- MLP: Outcome of Facilitated Referral (Dropdown single select); Lookup = MLP Outcome of Facilitated Referral
- MLP Referral Source Notified of Facilitated Referral Outcome (Yes/No)

Blocks

MLP Medical Institution Block

Available for both the Case/Matter and Outreach modules.

Displays a single-select dropdown list of MLP Medical Institutions (organizations with Organization Type = MLP Medical Institution).

After selecting an organization, displays a single-select list of MLP Medical Departments/Sites for that organization.

MLP Medical Department /Site Block

Available for the Organization module. Creates the departments/sites that are linked to the organization, and used by the MLP Medical Institution block above.

Multiple departments/sites can be added for each organization.

MLP ICD-10 Code Diagnosis Block

Available for both the Case/Matter and Outreach modules.

ICD-10 Code Category (single-select dropdown)

ICD-10 Code Block (single-select dropdown -- limited to only those that are listed under ICD-10 Code Categories)

ICD-10 Code Diagnosis (dropdown -- limited to only those that are listed under the ICD-10 Code Block)

ICD-10 Code (Read Only Based on what is listed in the lookup for ICD-10 Code Diagnosis).

List Views

MLP Medical Departments - for use on organization records to display the organization's departments.

MLP Matters - for use on organization records to display cases linked to the organization.

MLP Presentations - for use on organization records to display outreaches linked to the organization.

Glossary

ICD-10 Codes: (including ICD-10 categories, blocks, and diagnoses): the International Classification of Disease is a diagnostic system for classifying diseases, illnesses, injuries, and other health-related morbidities. It is used widely in health care for a variety of purposes, including documenting diagnoses, billing, and evaluating health care indicators.

- ICD-10 Category = broad description of type of disease or health-related problem
- ICD-10 Block = intermediate level description of type of health-related problem within a Category
- ICD-10 Code/Diagnosis = specific description of type of health-related problem within a Block

I-HELP™: mnemonic developed by the National Center for Medical-Legal Partnership to help health care staff and others categorize health-harming civil legal needs. *See MLP I-HELP™ Category, below.*

LSC: Legal Services Corporation, the largest funder of civil legal services in the U.S.; funded by Congress.

MLP Attendee Position Type: List of positions of medical staff who attend MLP trainings.

MLP Consult: sharing of legal information by the legal team to the health care team. In a typical MLP Consult, the legal team never meets or learns the name of the patient and does not open a “case.”

Example: a nurse practitioner consults with the MLP legal team after she finds out that one of her patients may be forced to switch school districts mid-academic year. The patient moved in with extended family after an eviction, and the patient’s parents are concerned that a change of schools will make an already difficult school year even worse for their child. The MLP legal team explains to the nurse practitioner about the McKinney-Vento Act and the protections it offers to students who are experiencing homelessness. After the nurse practitioner relays this information to the parents, the parents assert their child’s right with the original school district. Not only is the child allowed to remain in her school of origin, but the school district is now providing free transportation.

MLP Facilitated Referral: a “warm hand-off” of a patient’s legal care by the legal team to another provider of legal services. More than simply giving a phone number or website address to the patient, the MLP staff person may spend a significant amount of time ensuring the referral is successful, including direct communication with sister legal organizations and sharing relevant evidence/documentation (e.g., medical records) with the patient’s permission.

Example: a paralegal for a program that does not represent clients in immigration cases places a patient with a law school clinic that provides free immigration representation for survivors of domestic violence. As part of the facilitated referral, the paralegal obtains medical records documenting abuse-related injuries the patient has sustained and forwards them to the law school clinic’s students and attorneys.

MLP I-HELP Category™: list of five I-HELP™ categories used by MLP medical partners to categorize types of legal cases; analogous to legal problem categories.

Categories: Income & Insurance; Housing & Utilities; Education & Employment; Legal Status; and Personal & Family Stability.

MLP Medical Practice Area: a list of various medical specialties.

Examples: family medicine, oncology, pediatrics, psychiatry

MLP Referral Position Type: a list of health care positions.

Examples: nurse practitioners, physician (attending), physician (resident), social worker.

MLP Patient SDOH Risk Categories: List of patient experiences or characteristics that may indicate increased vulnerability to health-related problems.

Examples: Frequent absences from school; history of homelessness; parent / patient caregiver low literacy level

MLP Outcome of Referral Rec’d from Health Care Site: List describing possibilities for what happened after a medical partner referred a patient to the MLP.

Examples: Income complete and case accepted; Intake complete but conflict of interest; No response / no contact from patient

MLP Output for Health Care Partner: List describing the activities performed by the legal team on behalf of a referred patient.

Examples: Provided advice / brief service; Represented client in court; Represented client in administrative hearing.

MLP Special Populations: five patient populations that the National Center for Medical-Legal Partnership asks local MLPs to track. Patients may belong to more than one MLP Special Population.

Categories: Child (under 18); chronic illness; homeless / unstably housed; older adult (60+); veteran

SDOH: Social Determinant of Health