



2023-2024 Instance of Assistance Daily Form Instructions Bay Area

When to Use this Form

Use this form for each instance of assistance that involves direct contact with a self-represented litigant (SRL) regardless of the amount of time spent with the SRL. This form replaces the Member Service Tally Sheet. The form itself should be completed at the end of the interaction with SRL, before the next SRL is assisted.

Link to Form

This is the unique link for a Google data entry form for the Bay Area JusticeCorps Program:
<https://forms.gle/rLkPvgRQF4pqZxUT9>

Data Entry Instructions

Site – Use the drop-down menu to select the program site where you provided the service.

Total Time Spent – Check the box which best covers the amount of time spent assisting an SRL. Use your best estimate as an exact time is not required. **If the amount of time assisting an SRL exceeds 90 minutes, please indicate the time (in minutes) on the following line.**

Optional Member 2

Do not list court staff here. If two JusticeCorps members worked together to assist the litigant, please write the other JusticeCorps member's name here. Only one member should submit the IOA form for this interaction. Please avoid both members logging the same IOA.

Modality of Service

Check the box(es) for the type(s) of modalities by which you provided assistance to an SRL.

- **In person** – Select this option if you provide a one-on-one or workshop service in-person, whether that service is onsite at the FLF/SHC or at another location. Select this option even if that interaction was brief in nature like collecting signatures.
- **Telephone assistance** – Select this option if you provide services to an SRL by phone. Do not include checking voicemail but do include returning phone calls.
- **Email** – Select this option if you provide services via e-mail to an SRL, which might include emails to schedule appointments or to send documents.
- **Live chat** – Some FLF/SHC will be assisting SRLs via a real-time web-based live chat service. Only select this option if your site offers this service. Do not use this option for interactions by text.

- **CoBrowsing** - Select this option if you provide services by CoBrowsing, where services are provided by joint navigation through the internet by two or more people accessing the same web page at the same time. Some FLF/SHC will have the capacity to collaboratively browse the internet and/or collaboratively assist with completing online forms via tools such as HotDocs or Lawyaw.
- **Mail** - Select this option if you provide self-help or facilitator services via US or other mail service to an SRL, such as mailing packets of forms.
- **Video conference** - Select this option for each SRL who is provided with services via video conference, such as Zoom or Blue Jeans, which is a live, visual connection between two or more people in separate locations.
- **Other** – Assisting an SRL in the court room would be considered “other”. If this box is checked, write a brief explanation of the “other” service if provided.

Type of Service

Check the box(es) for the types of service(s) provided during the instance of assistance:

- **Info & referral/triage** – Often the SRL will have an identified need that will require the assistance of a social service or legal service provider outside of the center. In those instances, the member will provide information about and a referral to the needed service. Also, a member might provide a triage function at the FLF/SHC. Triage might involve providing basic information on court processes, distribution of court forms, and screening the SRL to determine eligibility for services and type of services needed.
- **Case Assessment/intake** - When a member asks questions of the SRL to determine the details and status of their case, this would be an assessment. This process typically leads to clarification of which forms need to be completed and what next steps will be necessary. Sometimes members will fill out a formal intake form following the assessment.
- **Assistance with forms** – Often members help SRLs complete their forms accurately. This assistance may include guidance as to how to properly check the boxes or feedback on how to clearly write their statement. This can include helping an SRL to use form-preparation software. When form assistance is provided, the member should write in the “total number of forms” that they assisted with on the next question. **If assistance with forms was not provided, place a zero (0) on that line. **Please only include the number of forms assisted with, not the total number of pages in the forms packet**
- **Filing assistance** – Some courts might be limiting in-person filing, rather encouraging SRLs to either eFile, mail, or utilize a drop-box. A member might assist an SRL with their filing.
- **Courtroom assistance/Day of Court** – If a member assists in the courtroom, explaining forms and documents, explaining court procedures, or making referrals.
- **Post-hearing follow-up** – assistance with post-hearing orders, debriefing with a litigant after the hearing, explaining the outcome of the hearing or next steps.
- **Courthouse wayfinding** – This may include activities such as explaining to a litigant which courthouse(s) handles the type of case that the litigant has or offers the services they need. Members may also provide other helpful information such as the court's hours, directions to the court, public contact information.

- **Language assistance** – Report when the member assisted the limited English proficiency (LEP) customer in a language other than English or if because of literacy issues assistance is provided with reading and/or writing for English speaking SRLs. When language assistance is provided, the member should indicate which language on the question that follows.
- **Signing appointment** – Sometimes a member may have a brief in-person appointment with an SRL for signing documents. Select this option if you hold such an appointment with an SRL.
- **Other** – If this category is used, please write a brief explanation of the type of service provided.

Number of Forms

If you helped with forms, enter the number of forms you assisted with. ***Make sure to only document the number of forms assisted with, not the total number of pages in the forms packet**

Please enter "0" if you did not assist with forms.

Type of Case

Select the option(s) for the type of case(s) for which you assisted. If you check “Other Case Type”, please complete the next question and document what type of case you assisted with.

Questions?

If you have any questions about data entry or the Google form, please contact:

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