

Creating/Updating Case Acceptance Policies on OTIS



Background

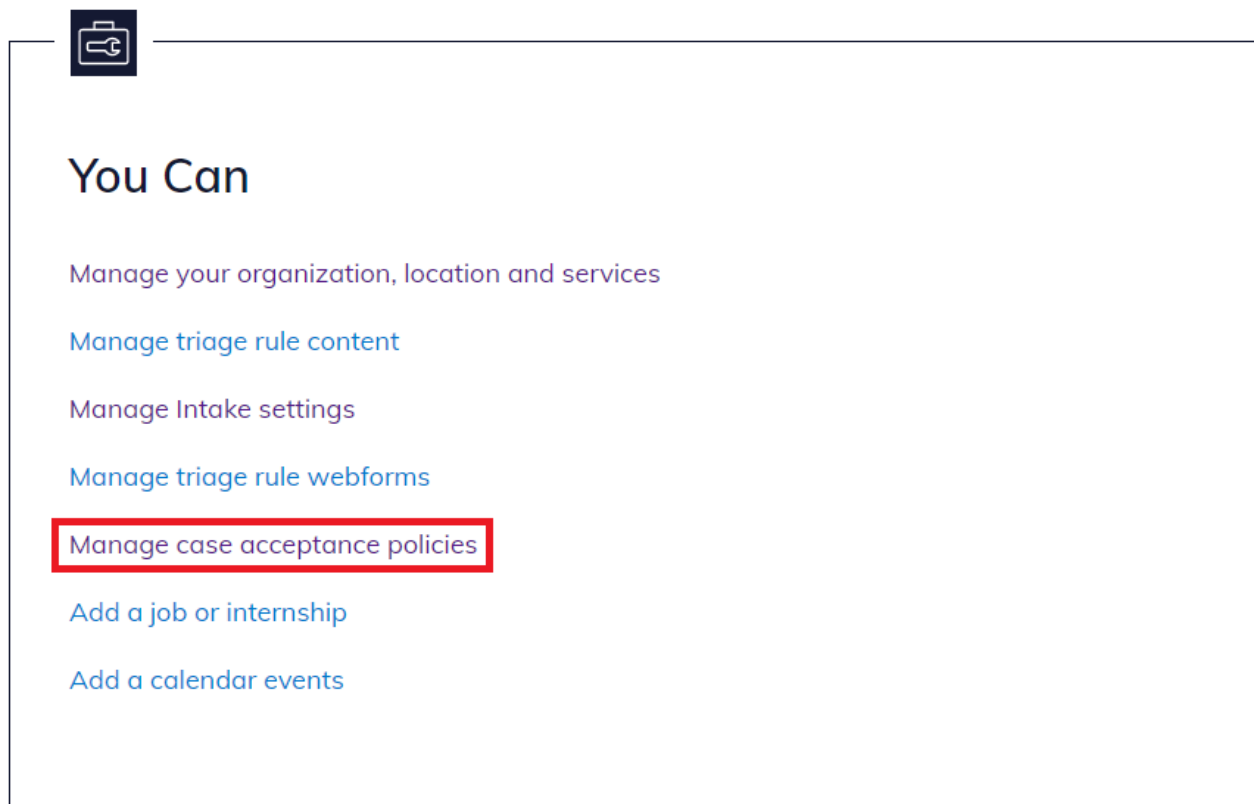
Guided Navigation on OTIS now allows us to provide website applicants one triage path to connect with the best organization(s). For Guided Navigation work, it relies on our OTIS Partners (you) to complete and update your case acceptance policies so we only send you cases that you are able to accept and serve.

To Create/Update new Case Acceptance Policies:

NOTE: To Change/Update Case Acceptance Policies, fill out a new Case Acceptance form and select the same Service as the existing Case Acceptance form.

Step 1 - You must be logged in

Log into www.illinoislegalaid.org. From your profile page, you should see something similar to the image below. If you do not see this, you do not have the required permissions and you should contact your Organizational Manager or [Mike Rush](#) at ILAO. Follow the link for “Manage case acceptance policies.”



Step 2

Review the list of current Guided Navigation triage that you can select from and then select the Title of the Case Acceptance form you would like to complete.

Title	Description	Category	Status
Case Acceptance - Criminal Defense		Guided Navigation	Open
Case Acceptance - Eviction (non-subsidized)		Guided Navigation	Open
Case Acceptance - Expungement		Guided Navigation	Open
Case Acceptance - Landlord		Guided Navigation	Open
Case Acceptance - Mobile Home		Guided Navigation	Open

Step 3

Within the Case Acceptance form, select your Organization from the downtown list and the Service that will accept this legal issue from the list.

Which organization?

Legal Aid Chicago ▼

Service

Which service(s) should these case acceptance rules be applied to?

- ☒ Client screening unit
- ☐ Bankruptcy help desk

NOTE: If you have more than one Service that will accept this legal issue, you will need to complete a Case Acceptance form for each Service.

Step 4

Answer all questions by selecting all of the boxes that match the Case Acceptance Policy for the Service selected.

What non-cannabis expungement cases do you help with?

- ☐ conviction as minor; cannot get a job
- ☒ conviction as minor; cannot get housing
- ☐ conviction as minor; some other issue
- ☒ conviction as an adult; cannot get a job
- ☒ conviction as an adult; cannot get housing
- ☐ conviction as an adult; some other issue
- ☒ convictions as a minor & an adult; cannot get job
- ☒ convictions as a minor & an adult; cannot get housing
- ☒ convictions as a minor & an adult; some other issue
- ☐ wants help removing name from sex offender registry (as minor)
- ☐ wants help removing name from sex offender registry (as adult)
- ☐ wants help removing name from sex offender registry (as minor & adult)
- ☐ All non-expungement cases

Step 5

Once all questions are answered, [Submit](#) the form.