

LRS PROCEDURES AND REQUIREMENTS

1. OPERATION OF LRS

- a. When a client calls or comes in the office, we ask them to briefly tell us their situation. We try our best to refer them on the appropriate panel. Often times, the client does not have funds or does not have a legitimate legal issue, and we do not refer them. However, of course we cannot evaluate the entirety of their legal issue, and clients that may not have any legal remedy are still referred.
- b. We collect the \$50 referral fee directly from the clients before making the referral.
- c. After processing their payment and entering their information in our system, we send an email to the referred attorney to let them know that the client will be calling to make their initial consultation.
- d. We inform the client to call your office to schedule their first appointment.
- e. After that first 30 minutes, any fees collected are between you and the client.

2. 30 MINUTE CONSULTATION

- a. You are required to provide a 30 minute consultation to referred clients. I do not expect you to meet each client in person, and often times it makes more sense to do this over the phone. However, you must do one or the other. This is required by the Rules of Service, and we tell the clients they will be receiving such.
- b. When a client does not receive the consultation, it not only makes the LRS look bad, but it wastes our time having to address their complaints, or having to respond to charge backs from credit card companies. This takes time away from making other referrals, and is not fair to attorneys who actually take the time and meet with clients.
- c. I know that many times you can decipher in 5 minutes whether the client has a case/you are interested in the case/etc. However, the client does not know this and is entitled to the entire consultation.
- d. Under no circumstances shall the attorney use the initial half hour of consultation exclusively to discuss fees and then bill the client at his or her regular rate for a half hour of substantive legal consultation. A phone conversation with an attorney's administrative staff is not a considered a consultation. If a client is denied by office staff to make an appointment for a consultation with the referred attorney, this will be considered a failure to provide consultation.
- e. Please communicate with your staff so that they are aware of referral procedures. If you receive a referral from a panel of law which you do not handle, it is only because you elected to be on that panel on your application. If you want to be removed from specific panels, please let me know.

3. FEES

- a. Attorney Fees
 - i. We never tell a client how much an attorney is going to charge for their services. We explain that the attorney will give them the initial consultation, and after their 30 minutes is over, the attorney will be charging their own fees. Please refer to the following rules:
 - ii. We know that many clients have said that they expected free services or cannot afford to pay. We try our best to explain that all of our attorneys are private attorneys who will certainly charge for their services should the client decide to retain the attorney. One of the reasons we charge the referral fee is to try to "weed out" clients who lack the ability to pay attorney's fees, therefore resulting in higher quality referrals.
- b. Remittance Fees

- i. Remittance fees (15%) are due within 10 days of receipt of such fees from client. For cases where client pays an initial retainer but the total fee is not yet known, you must remit 15% of retainer paid by client within 10 days of receipt. You will then remit remaining percentage owed on total attorney's fees at the end of the case. Remittance fees are due for ALL referrals – including low fee panel referrals. The amount you charge as “low fee” is entirely at your discretion. Failure to remit such fees will result in de-activation.
- c. The “Low-Fee” Panel
 - i. When we refer a client on the low fee panel, we explain to them that the attorney is still a private attorney who charges fees for their services, and that we do not have pro bono attorneys.
 - ii. When referred clients from the low fee panel, we ask simply that you will work with them on the fees; whether that be charging less than your regular rate, or working out a payment plan. There is no reduction requirement or cap on these fees.
 - iii. Of course, these fees are between you and the client, and we explain to them that you will discuss fees at that first consultation.

4. FORMS

- a. Individual Referral Forms
 - i. We send an email each time we refer a client. Please respond to this email or fax the form back to us as soon as possible. This helps us keep our records accurate and also to keep track of successful referrals. If you do not end up taking the client, we want to know so that we can reflect this in our system so that you receive the next referral in that area.
- b. Case Summary Questionnaire
 - i. You will receive a Case Summary Questionnaire every two months. This lists all cases referred to date which have not been reported as closed/rejected/no show. LRS Members who do not return the report will be inactivated until the report is received. Please look at the status – do not return the report the same way you received it – if a referral from 6 months ago is marked as “conference” – change it to closed/rejected if nothing came of it – or to retained/additional services if that is the case.

5. RETURNING CALLS/VACATION

- a. Please inform the service if you are out of town or unable to take clients for any period of time.
- b. The number one complaint from clients is that attorneys do not return their calls.
- c. It is expected that client will be able to make contact with *someone* in your office within **24** hours, and to be able to make contact with *the attorney* within **72** hours.
- d. Not responding to a client for a week is not acceptable. This doesn't mean I expect you to be able to schedule the consultation immediately – only that you respond to their initial call. Clients call back for 2nd referrals when they haven't heard from you, taking time away from making new referrals. I know everyone is busy, and aren't waiting in anticipation by their phone for LRS referrals to call. I always tell the clients to wait for a return call, and that lawyers are in court/meetings/etc., and aren't usually available immediately - I don't want you to lose a potential client – however, after a reasonable amount of time has passed I have to send them elsewhere.
- e. If you are on vacation or unavailable to take referrals, please notify LRS of this fact and the date of your return. I can de-activate your file and set it to re-activate automatically on a specific date. If another attorney in your office is handling referrals while you are gone, please notify your staff so that they may set the appointment with that attorney instead.