Effortless Intake

EffortlessLegal

Summary

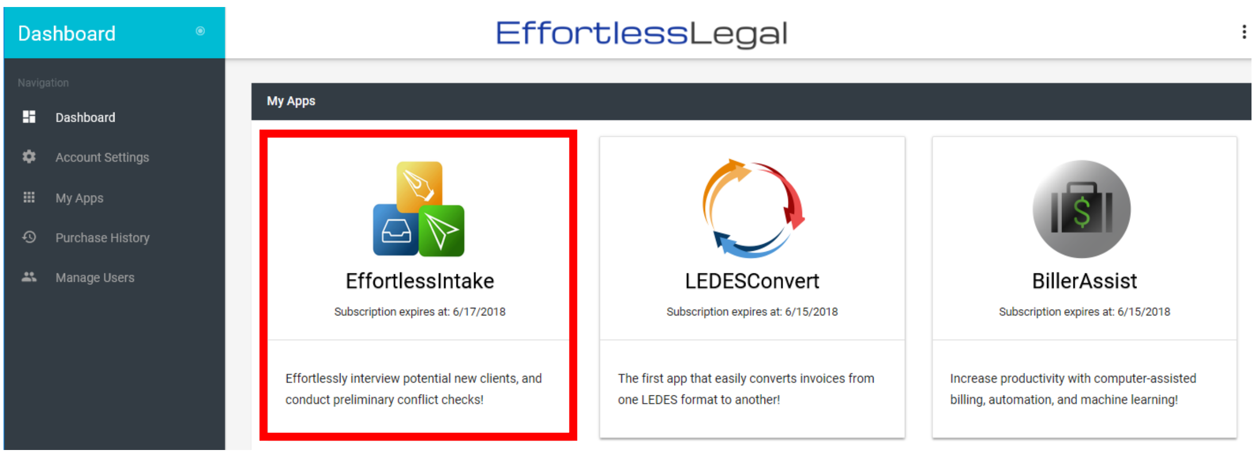
- Automates your entire intake process
- Invites potential clients
- Sign up clients from your website
- Automates conflict checks
- Comes with several ready-to-use intake forms
- Customizes your own intake forms

Overview

- Form builder
- Add, Invite and Assign Applicants
- Review applicants
- Settings

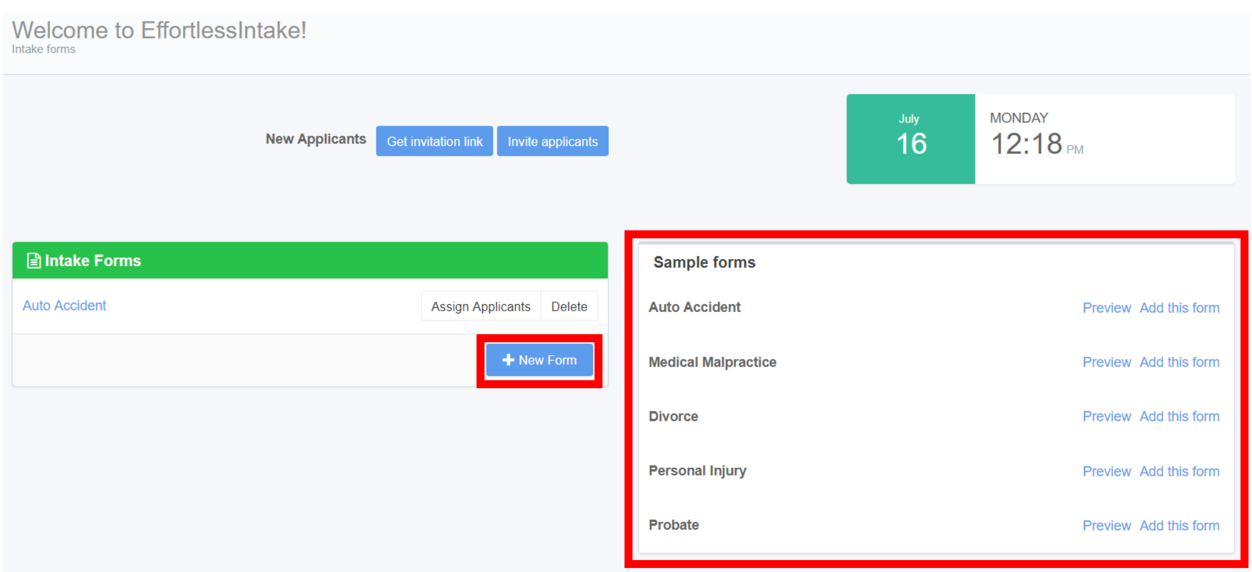
Where to Begin

EffortlessIntake is launched from the EffortlessLegal dashboard. To begin, you will need to sign up with an account, and can then log in to the dashboard from the EffortlessLegal homepage. Input your credentials, and you will be directed to the dashboard as shown below. Select EffortlessIntake, or purchase the app if you have not done so already. If you would like to learn more on how to create an account with EffortlessLegal, click here!



Form Builder

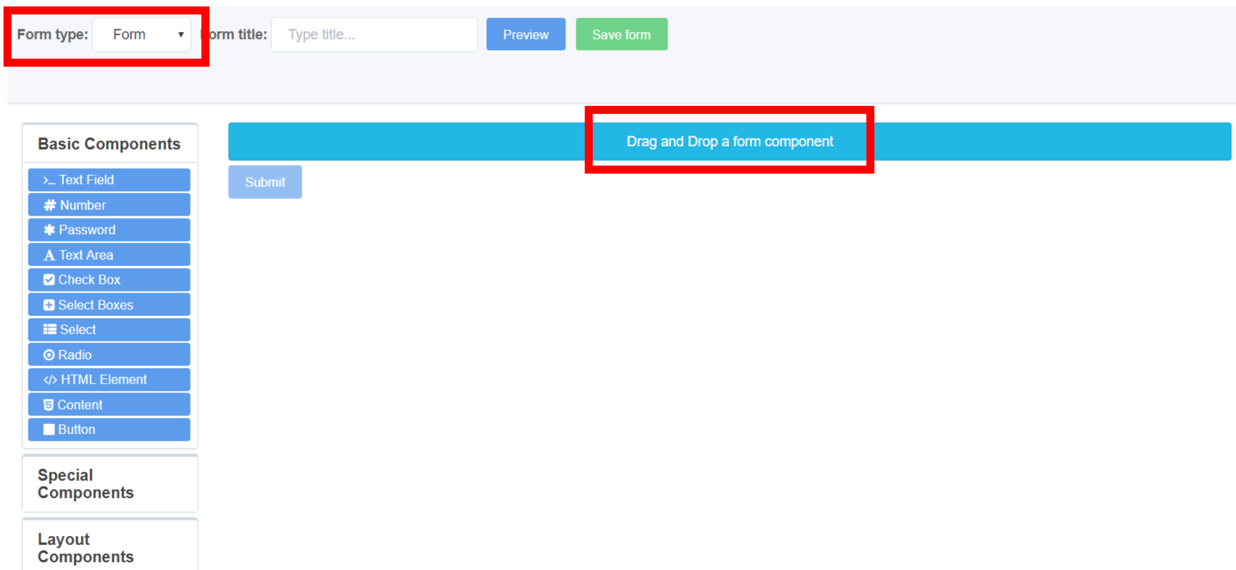
Upon signing-in, select "admin" as it is the only role in EffortlessIntake. Sample forms have already been generated to the right, or you can create your own form by selecting "New Form."



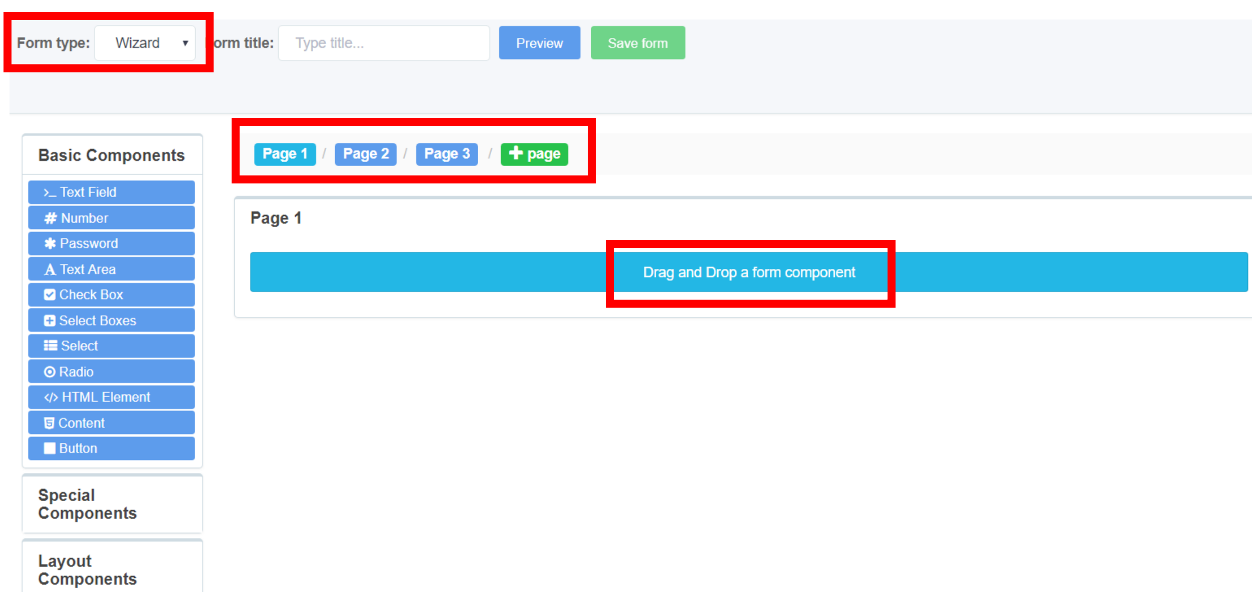
New Form

Selecting "New Form" allows you to create your own intake form for potential clients. EffortlessIntake gives you various options to create a form as best as you see fit.

1. "Form" allows you to drag and drop a form component from the left into the tab above labeled "Drag and Drop a form component."



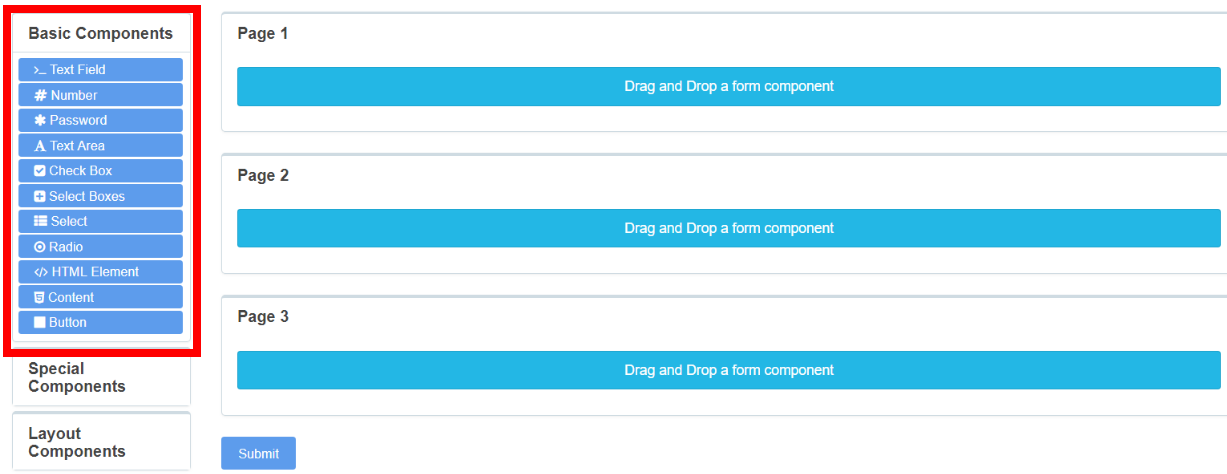
2. Selecting "Wizard" allows you to add pages and navigate between each page individually as tabs as you continue to build your form. Let's add three pages by selecting "+PAGE" as shown below.



3. Next, you can begin to populate the form you are creating by selecting and dragging components from the left with either “Basic”, “Special” or “Layout” components.

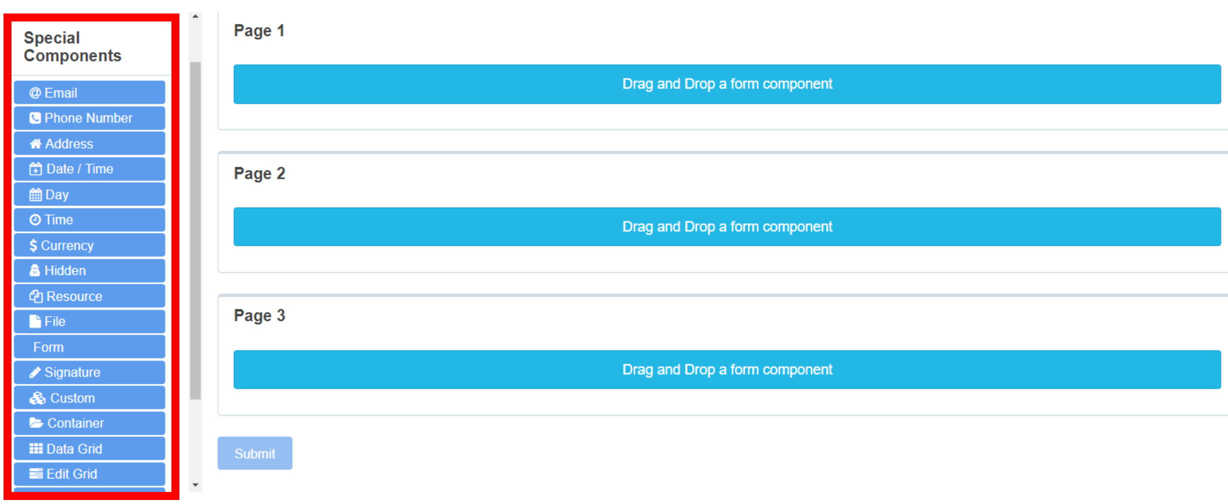
Basic Components

You can see the “Basic Components” associated with this tab to build an intake form below.



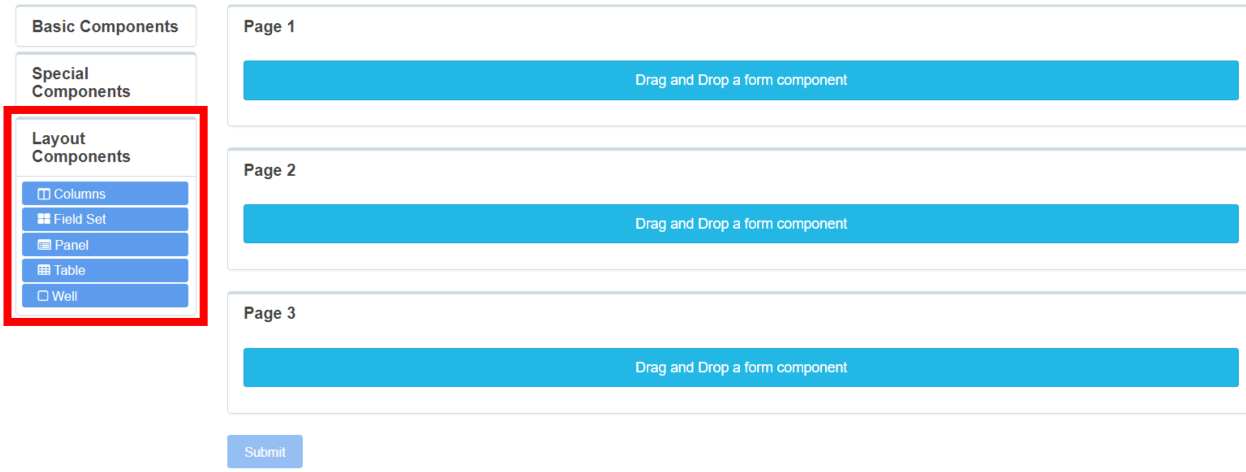
Special Components

You can see the “Special Components” associated with this tab to build an intake form below.



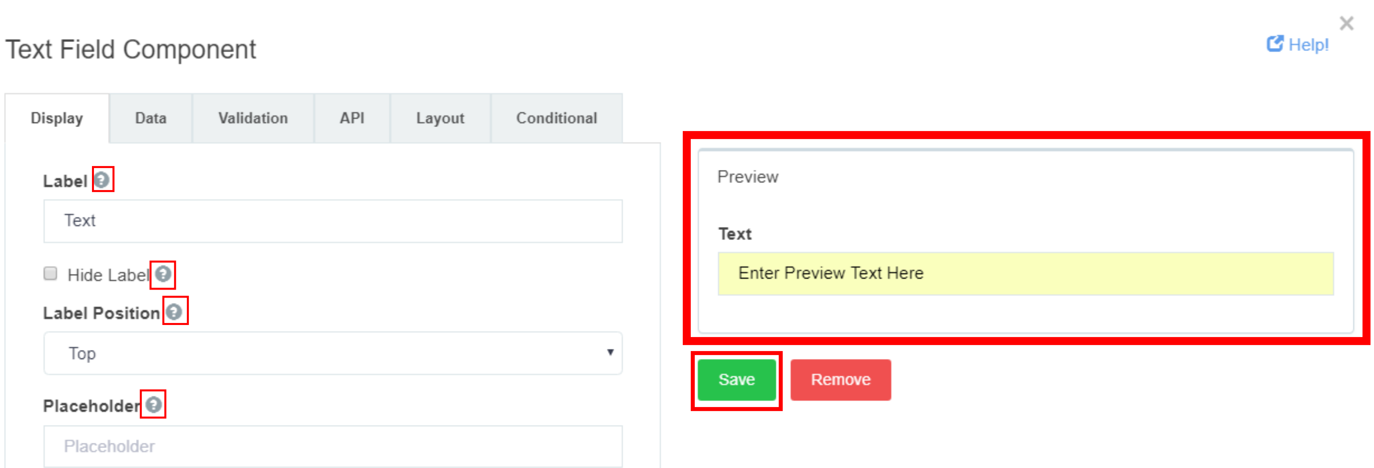
Layout Components

You can see the “Layout Components” associated with this tab to build an intake form below.

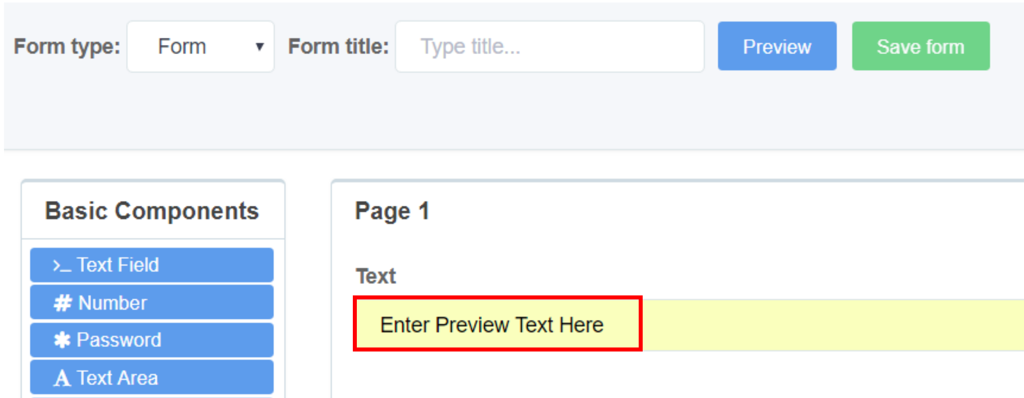


Let’s go back to “Basic Components” tab and drag “Text Field” into the form builder space.

1. You can begin populating information in the fields below to create the form. Each field has a next to it with a brief description of what is necessary for the field.
2. On the right, you will see “Preview” box. You can add a text description to label that component as you continue to work on other components as you your form. Click “Save” to complete.

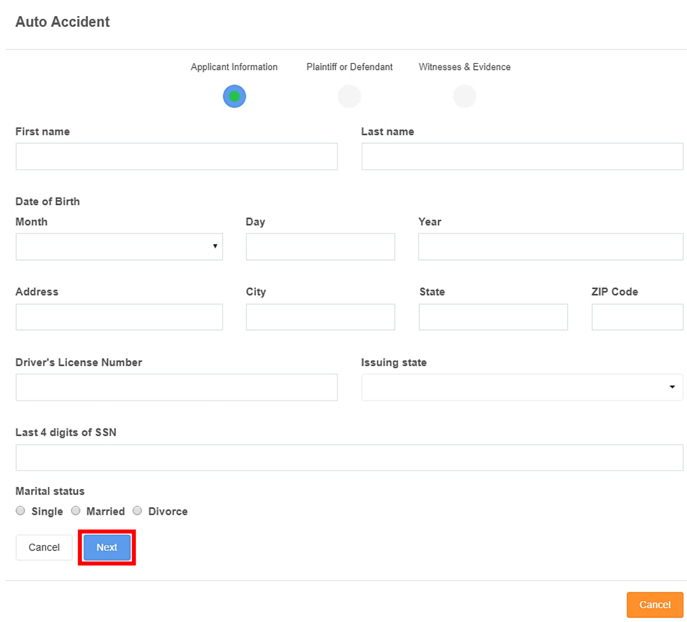


3. You can see the text preview shown below and can now do this for the rest of the components you wish to add as you continue to build your form.



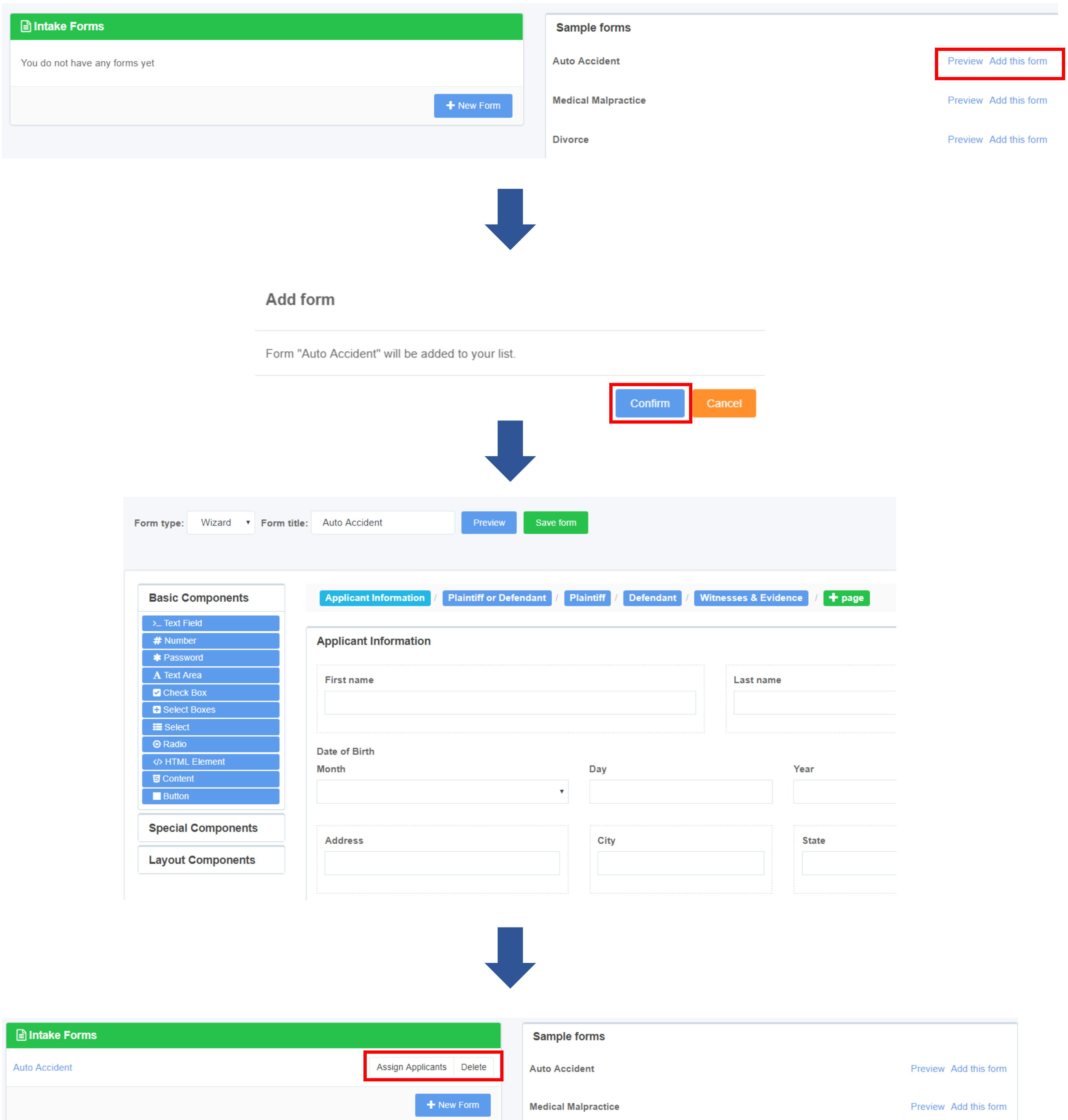
Sample Forms

If you wish to use the sample forms provided, select one of the five options. If you select "Preview," the form will emerge. Let's try "Preview" for "Auto Accident."



1. You can now preview the "Auto Accident" intake form as if you were a potential client. At the top of the sample form, you can view the steps associated with the form you selected.
2. For "Auto Accident," there are three steps: "Applicant Information", "Plaintiff or Defendant" and "Witnesses & Evidence."
3. Click "Next" to surf through the sample form to see if it contains all the necessary fields you prefer.

4. To add a sample intake form, select “Add this form” on the right. Click “Confirm,” and then edit the sample form as preferred. Click “Preview” to get an overview or “Save Form” if complete.

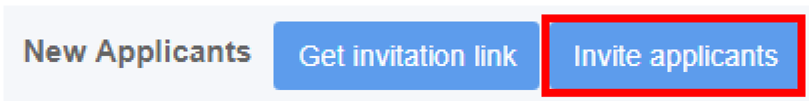


5. Once complete, you will see the form in the intake section. You can then “Assign Applicants” or “Delete” the intake form.

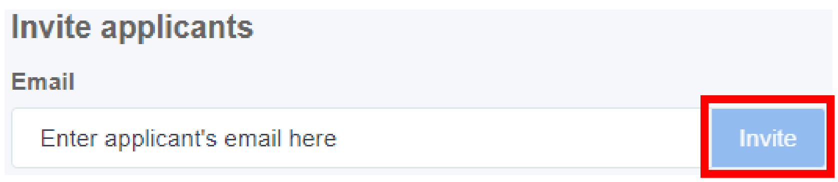
Assigning Applicants

An applicant is a potential client that you would like to invite to complete your intake form. Once a potential client is invited and completes their sign up, you can assign them to fill out an intake form.

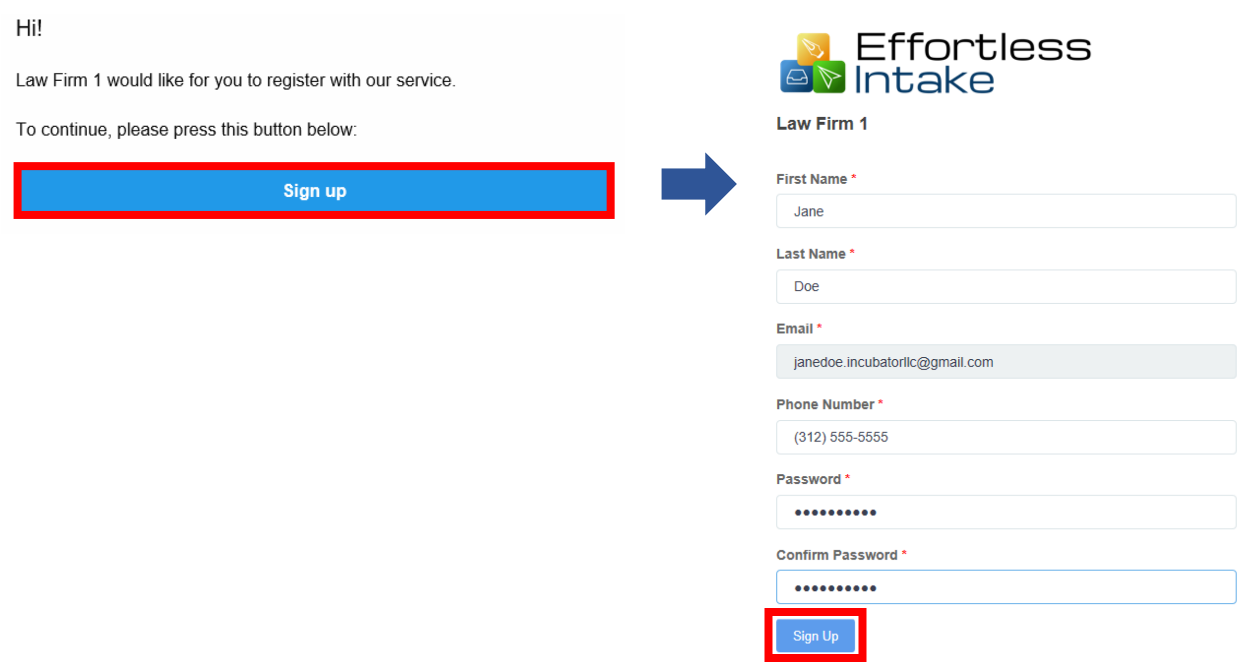
1. First, for an applicant to appear in “Assign Applicants,” go to the “Form Builder” tab or the “Settings” tab on the top of the page to invite an applicant. Select “Invite applicants.”



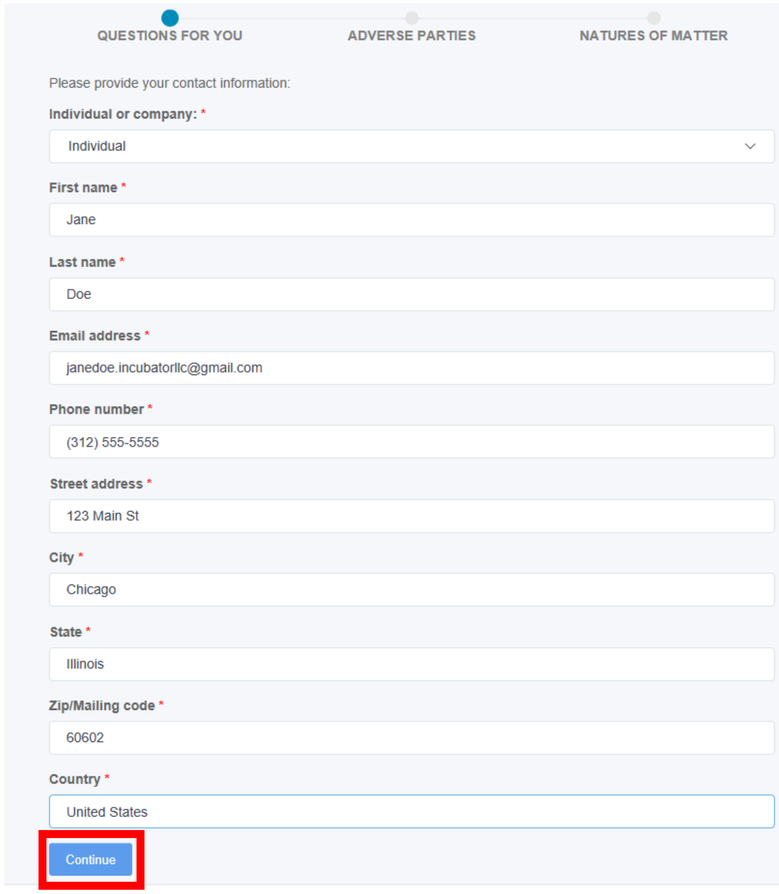
2. Enter a potential applicant’s email below and click “Invite.”



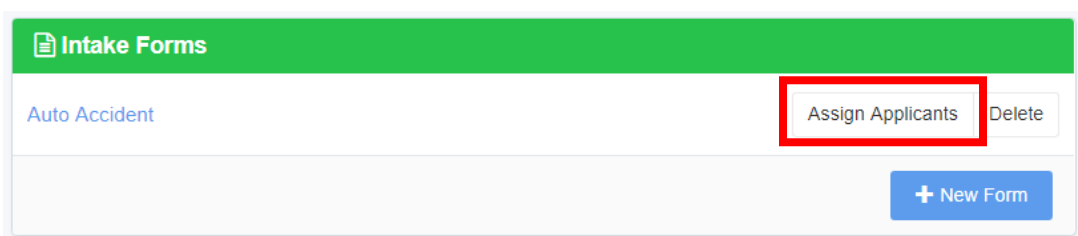
3. The invited applicant will receive an email to register with EffortlessIntake. Select “Sign up” and complete the form to the right and click “Sign Up.”



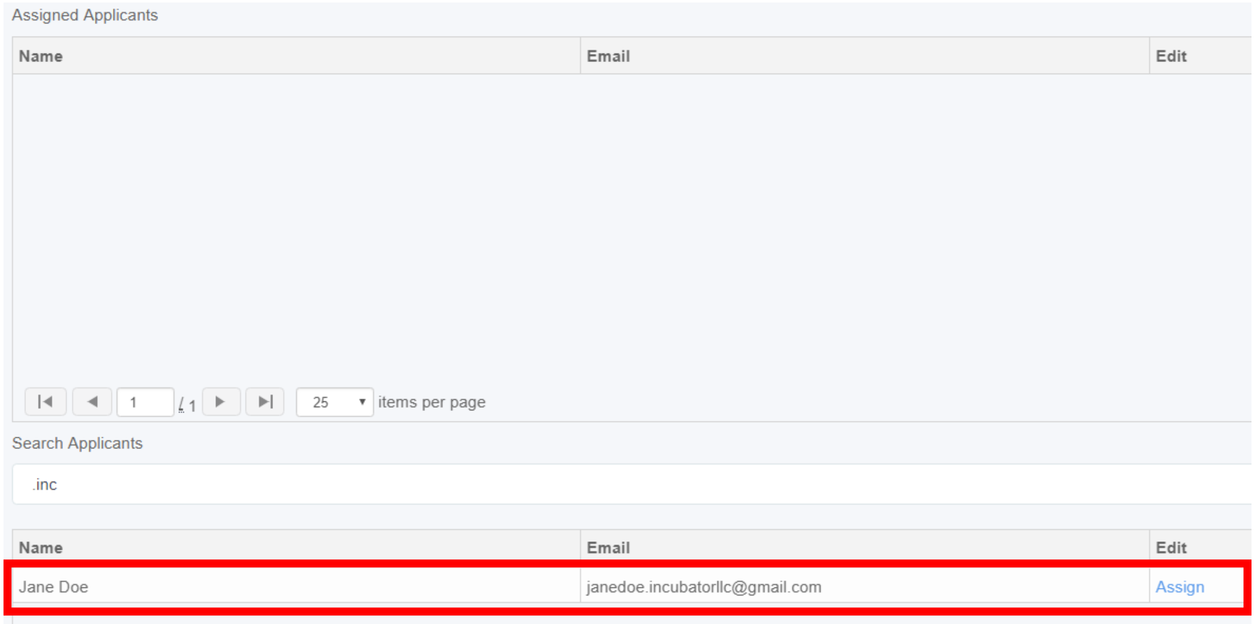
4. Next, the invited applicant will have to provide some information about himself or herself, and about the persons or companies who will be adverse to them.



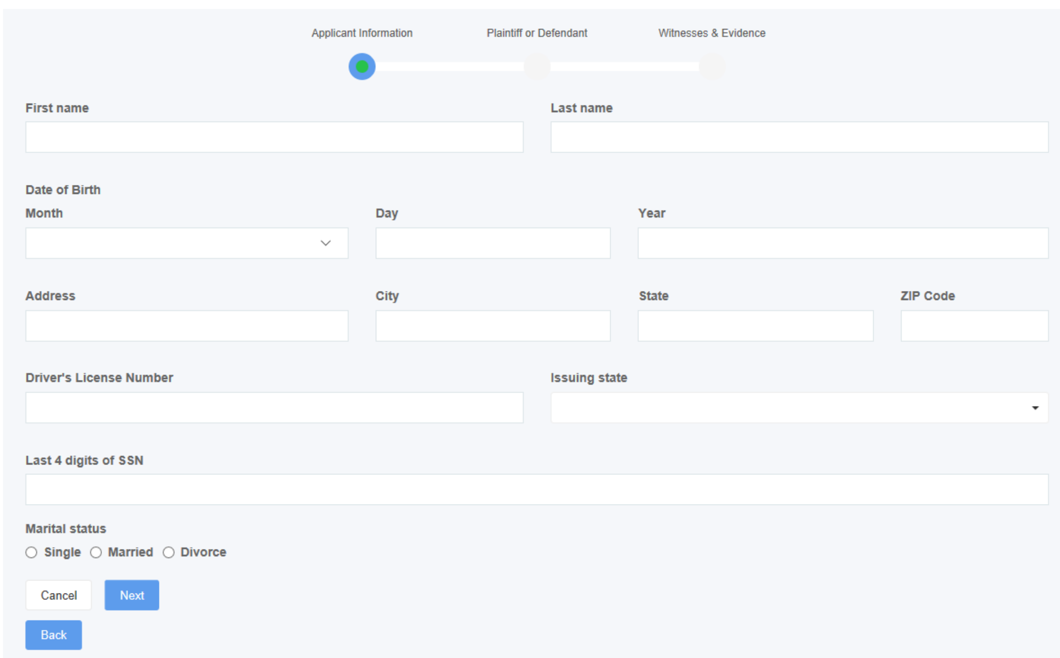
5. Once the invited applicant completes the form above, you will be able to assign them to an intake form by selecting "Assign Applicants" in the "Intake Forms" section.



6. You will now see the invited applicant that you can assign to the intake form. Select "Assign" for Jane Doe under "Edit."



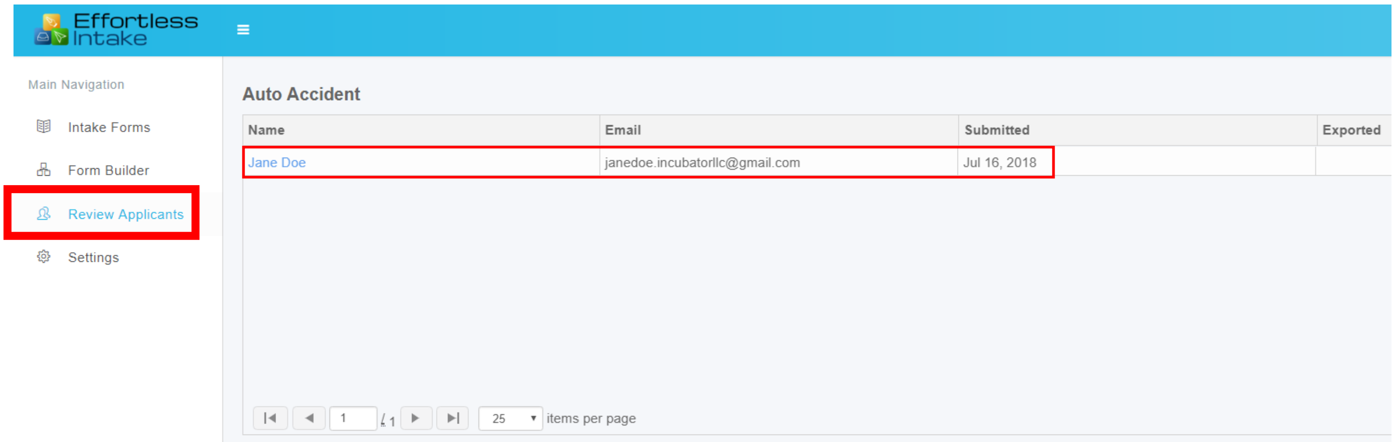
7. Your invited applicant can now fill out the "Auto Accident" form that we began with. The applicant can fill in the necessary fields, and then submit the form.



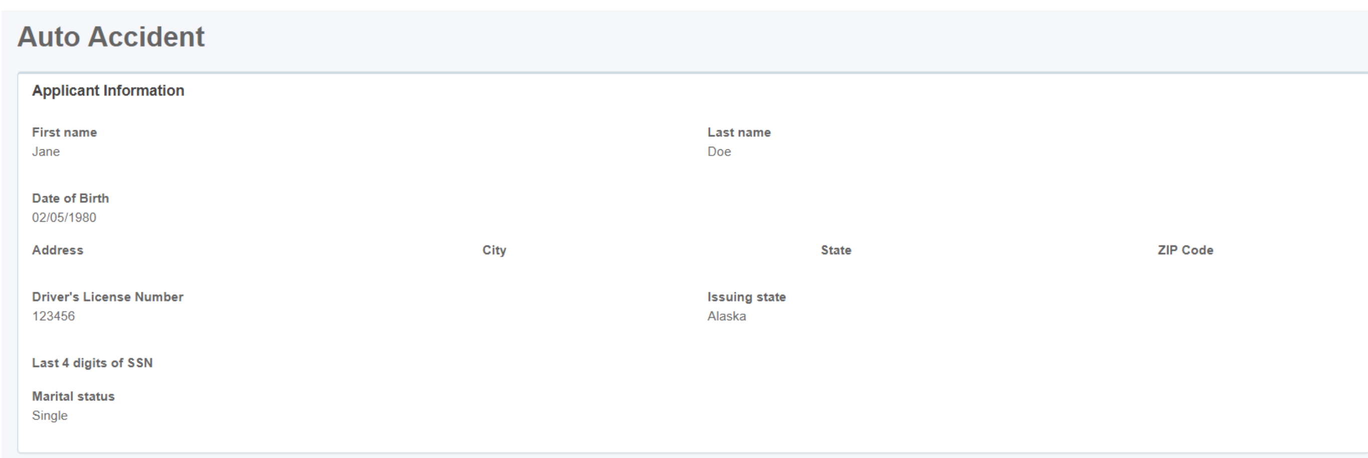
Once complete, the intake form will be ready for your review.

Review Applicants

You can view the submitted intake form in the “Review Applicants” tab in EffortlessIntake. You will receive an email once the applicant has submitted their intake form. Continuing with the example previously, see below how the auto-accident intake form is ready for review.



1. Select the applicant’s name, Jane Doe, to review the submitted intake form.

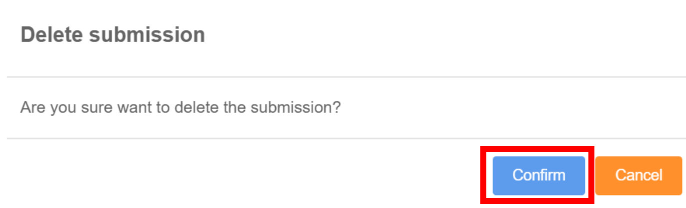


2. After reviewing the submission, a user will have the option to either export to Clio, create a PDF or to delete the submission.

- To “Export to Clio,” enter a matter description that is similar to or matches the current billing system you are using and then click “Export.” You will be prompted with a message to authorize access in order to connect to Clio.

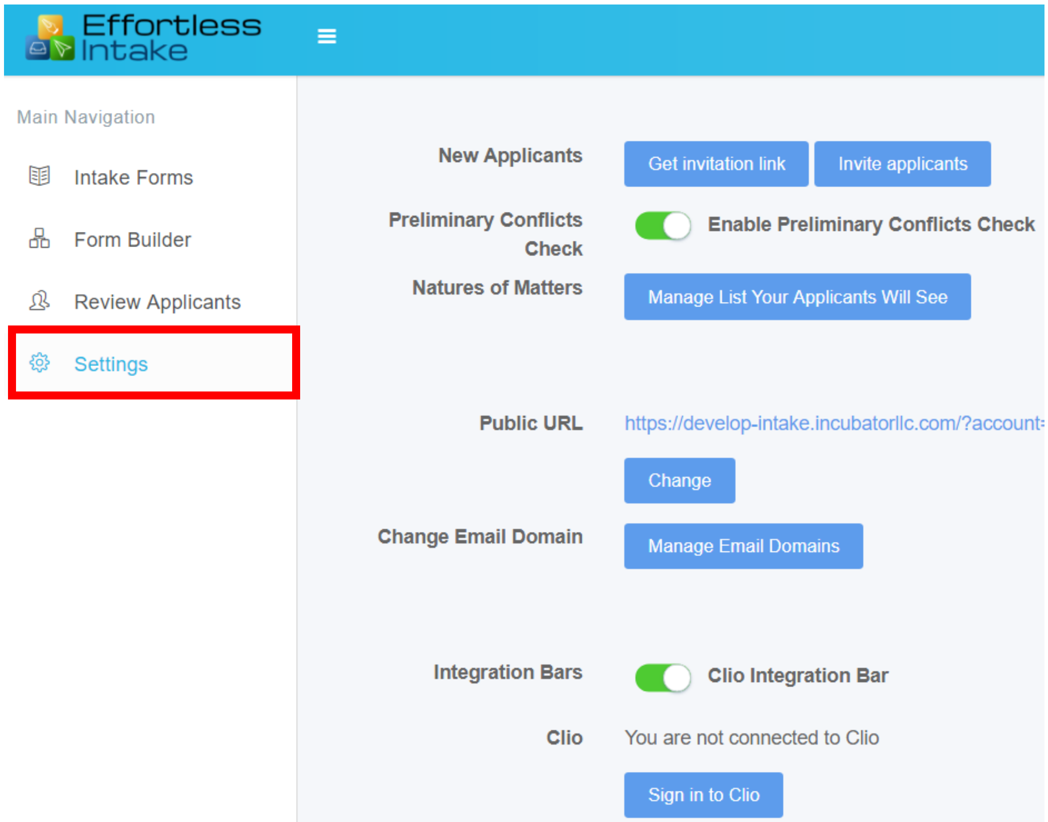
The submission will then automatically upload to Clio’s “Matters” tab.

- Select “Create PDF” to automatically download a PDF file of the intake form to the browser.
- If you choose not to move further with the submitted intake form, you can choose to delete it. Select “Delete Submission” and then click “Confirm.”



Settings

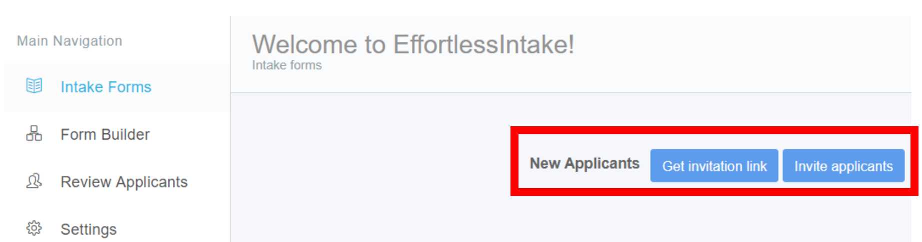
You can manage their EffortlessIntake account on in the “Settings” tab.



Applicants

To get an invitation link that is sharable, select “Get invitation link” and a shareable link will automatically copy to the user’s clipboard. Paste the link in an email, text or select “Invite applicants” to enter an email address manually to send an invite similarly to the example at the beginning.

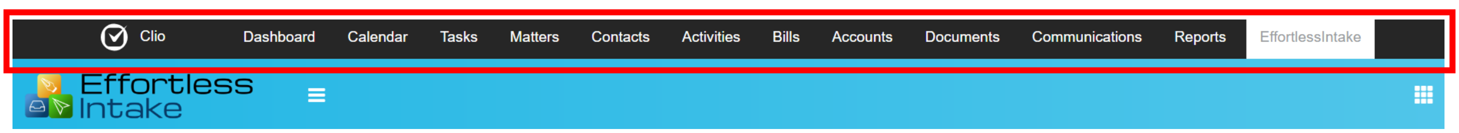
This can also be done upon logging in to EffortlessIntake at the beginning under “Form Builder.”



Clio

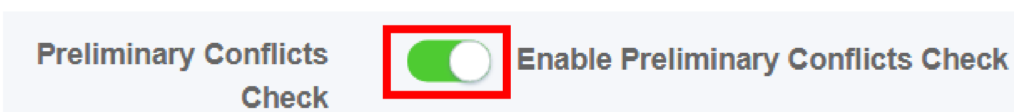
Integrating EffortlessIntake with Clio simplifies the intake process even more. You can sign-in to connect both platforms, as well as to link Clio's integration bar to EffortlessIntake's dashboard as shown below. If you did not sign in during the example above when we exported the file to Clio, you can do it here similarly to the steps shown above.

Select the toggle button as shown below and Clio's integration bar will appear above the page.



Preliminary Conflicts Check

You can enable preliminary conflicts checks by selecting the toggle button, which will automatically conduct conflict checks between a potential client and a current client within your practice management system.



USER NOTE

We allow our users to add applicants as “Contacts” in Clio. Here are the steps:

1. Turn on “Preliminary conflicts checks” in the Settings tab
2. Our application automatically sends an invitation link to the applicant
3. Applicant fills out a preliminary conflicts check form provided by our application
4. Our user is then given the option to add the applicant as a “Contact” in Clio

The above process is designed to accommodate our users who want to add a link to their law firm website. This way, our users can have potential new clients screened automatically, before our users receive any confidential information.

Alternatively, potential new clients could be screened for conflicts by inviting them in the “Settings” tab or in the “Form Builder” tab. If preliminary conflict checks is turned off, then an applicant can be assigned a form to fill out immediately.

In this case, our app assumes that the conflict check has already been completed, and that our user can accept confidential information from the applicant. Thus, the applicant should already be a “Contact” in Clio (with conflicts cleared).

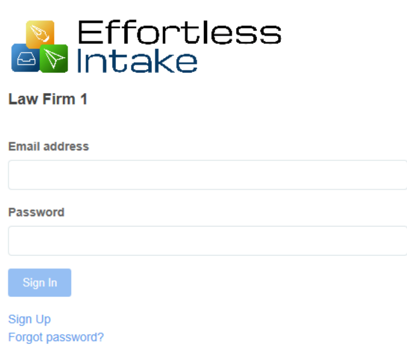
With conflicts cleared, our app allows our user to easily interview the applicant to obtain their complete (confidential) information. Once the applicant fills out the form assigned to them, our app provides the option to accept the applicant by setting the applicant up as a “Matter” in Clio.

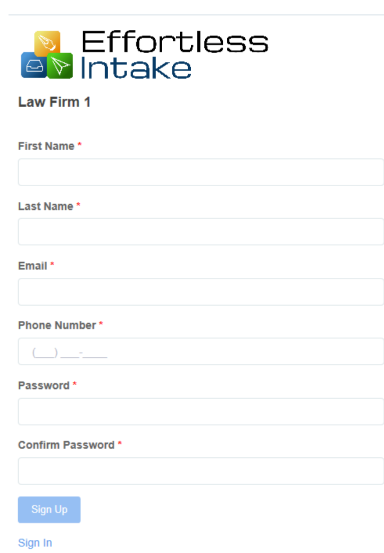
Public URL

You can alter your public URL by selecting “Change.” The Public URL setting allows you to add a link to our app in your website, and sign up new clients directly off your website. You can add the Public URL link we provide to your website. Enter a name you wish to alter your public URL to where it says “Name” and click “Save.”

Potential new clients can then simply sign up and then fill out a simple conflict check form directly from your website.

- We suggest enabling the Preliminary Conflicts check feature as shown above if you choose to do this.
- The link takes the visitor to our “Sign In” page. The “Sign In” page has a “Sign Up” function on it if the visitor does not yet have an account with the law firm.





The default sign in page provided in the Public URL link is intended to allow the law firm to have their potential clients easily return to an intake questionnaire that the potential client started filling out but did not finish. In this case, the potential client can simply go to the law firm's website, log back in using the link to the "Sign In" page in our app, and then complete the questionnaire.

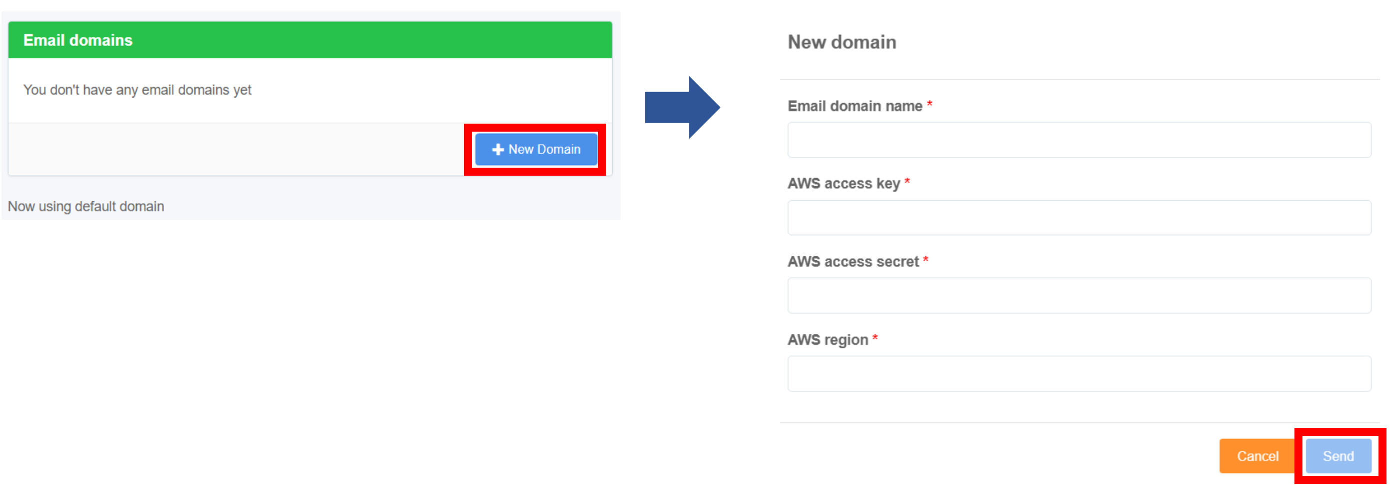
However, for new potential clients who do not yet have an account with the law firm, this may not be completely obvious. Therefore, the law firm may want to open the "Sign In" page, select "Sign Up" on that page, and then use the sign-up URL as the link the law firm hooks up to the law firm's website.

Change Email Domain

You can send EffortlessIntake emails from an email address you own. By default, all emails will be sent from an EffortlessLegal.com email address. However, you can easily change the email address we use to send emails from our app, in order that the emails come from an address that you own.

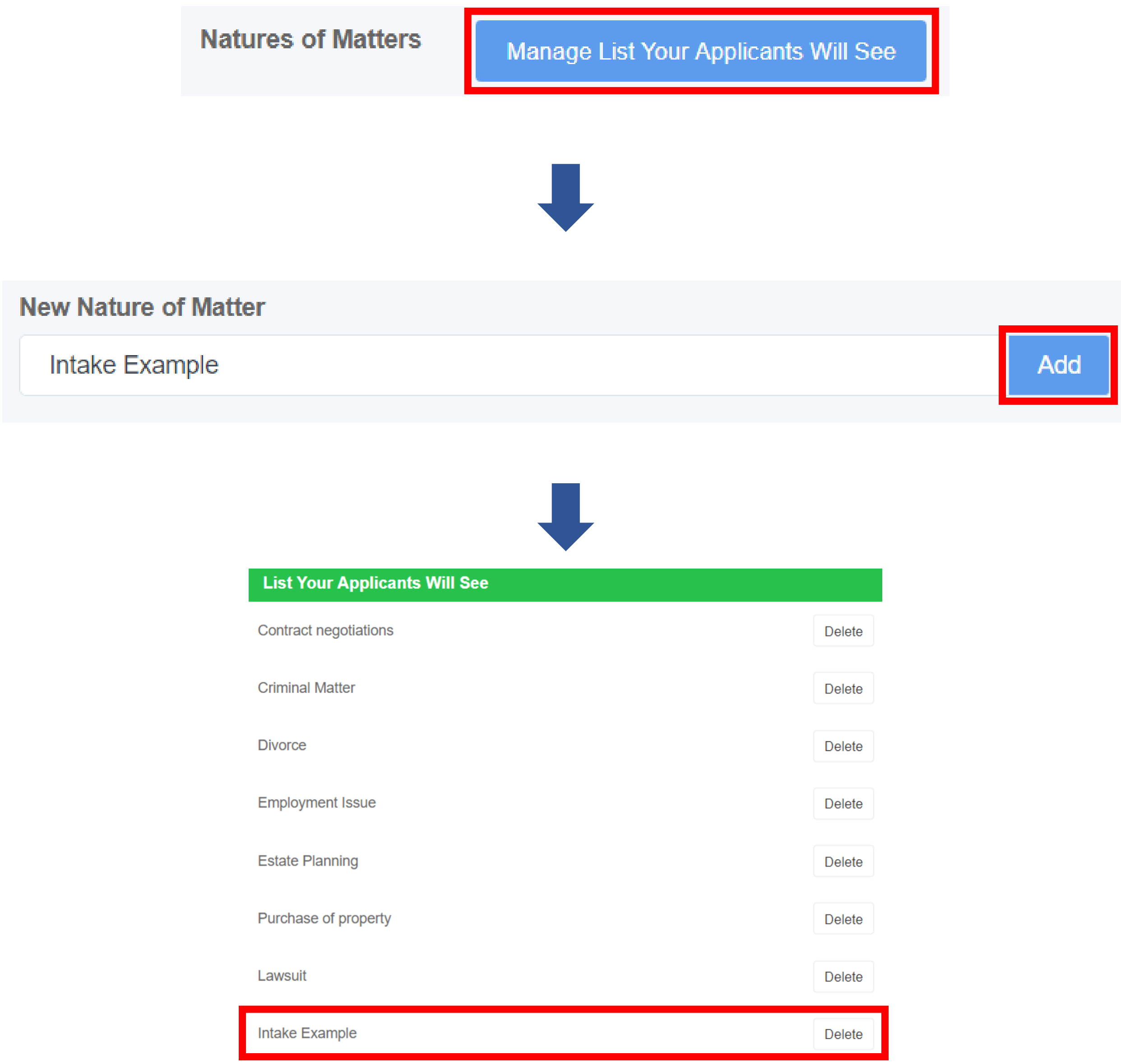
Our app is integrated with Amazon SES, a popular email delivery service. You can sign up for a free Amazon SES account at: https://aws.amazon.com

Amazon SES is easy to set up. When you set up an account with Amazon SES, they will provide you with the information you need. Just press the "New Domain" button on the left to get started. This allows you to start sending emails from their own email address.



Natures of Matters

The Preliminary Conflict Check process allows your applicants to choose the nature of the legal matter for which they would like your assistance. The "List Your Applicants Will See" shows the types of legal matters your applicants will be able to choose from. You can add new types of matters to this list in the "New Nature of Matter" section. View a step by step below.



Now, you can manage your account all in one place with EffortlessIntake’s “Settings” tab! Return to the “Form Builder” tab to begin again.

Conclusion

- Automates your intake process
- Sign-up clients from your website
- Automates conflict checks
- Form builder
- Customizable
- Modifiable templates
- Integrates with other applications
- Paperless & easy to access
- Encrypted & secure