

## **BASIC RULES FOR WORKING IN THE SELF-HELP SERVICES**

1. **Make sure everyone reads and signs an intake form before you assist him or her.** The intake form has important disclosures about the type of service we provide. It is essential that everyone sign an intake form before we provide information or assistance on his or her case. Other information on the intake form is optional, although we encourage people to complete the form so we know the types of matters presented in the self-help centers, and can better stock the materials most in demand.
2. **Request each person who has received help to complete an evaluation form.** We ask persons to evaluate our services so we know how we can improve the services. We have evaluation forms in Spanish and English. Sometimes people will be rushing to file and answer in an unlawful detainer case or have to meet some other filing deadline. In these cases, it is more important that they file their papers in time, than complete an evaluation form. We should ask them to come back after filing their papers and complete an evaluation form, but we should never delay people from meeting a filing deadline by insisting they complete an evaluation form first.
3. **Do not make estimates about the outcome of motions or other matters pending before the court.** Many times people will ask what their chance of prevailing on a motion may be, or they might ask about the other side's chances of prevailing. We should never estimate the chances for failure or success. We can explain the showing the court requires to grant, for example, a motion for relief from default, or a motion for summary judgment, but we cannot state what the likely outcome will be. Doing so goes beyond providing legal information, and borders on advocacy, which is solely within the realm of private legal counsel.
4. **Do not gossip or discuss what you may know about a person or case with people using our services.** You may personally know someone involved in a case, or may be asked personal questions by people using the center about others involved in their case. Do not discuss or share your personal knowledge of other people with members of the public who use the center. It compromises the court's impartiality, and detracts from the professionalism of the center.
5. **Do not be afraid to tell people you do not know the answer.** Often we will be asked questions for which we do not know the answer. It is best to be honest with people and tell them we do not know. We should, however, try to find out the answer. Sometimes we can call a court clerk, or another agency, to get the answer while the person waits. Often times we will have to wait until someone gets back to us before we can get the information that we need. Still other times we might

have to research the answer ourselves. In cases such as these, it is permissible to write the person's telephone number on his or her intake form, and to get back to him or her by telephone after we have located the necessary information. If a person does not have a telephone, you can ask him or her to come back in a few days, but please leave the intake form and the answer to the person's question in a folder with staff, so they can respond to the individual when he or she returns.

6. **Make sure you are referring the person to the correct place before sending him or her there.** There is nothing worse than being shuffled from one place to another. We should not be adding to people's frustration by sending them to the wrong place. Make sure you understand what the person needs, or where they have to go, before sending them someplace else. Sometimes it is best to call the referred agency or department to make sure it can accommodate the person, before sending him or her there.
7. **The Self-Help Centers works on a drop-in or appointment basis, and provides minimal information by telephone.** We are not equipped to provide detailed information, other than location and what we do, over the phone. The SHC is set up primarily as drop-in center and in order to serve the persons coming in the door, we cannot stay on the phone. Also, it is important to see what papers people have been served with in order to know the type of response they need to file. Often people give inaccurate descriptions over the phone, which can result in us giving incorrect information. It is always prudent to look at a person's papers before determining which forms they need to obtain. Finally, it is necessary for people to read and sign the disclosure statement on the intake form in the SHC before we discuss their case with them so they understand that we are not providing confidential consultations or legal advice.

There will be occasions when someone calls in from out of state needing information about a pending case. Coming into the SHC is not an option for a person who resides a long distance away. Use your discretion in answering questions, and be sure to emphasize that you cannot guarantee the accuracy of the information you are providing because you have not seen the papers. You might say: "If such and such happened, they you can do such and such", always prefacing the information you provide with "if".

8. **Dress appropriately.** You are representing the courts, and should dress in a professional manner. We want people to know how to appear in court, so we should set an example by the clothes we wear.
9. **Treat everyone with respect.** Many of the people coming for assistance will be irritable and frustrated because they have already been to different agencies or department and did not received the information they needed. Others will be frustrated because they discover they are unable to accomplish what they are trying to do. Even though we may not be able to tell people what they want to hear, we can always treat people with respect.

Sometimes people have disabilities that make it difficult for them to speak, or be understood. It may take time to listen to them before you will understand what they are trying to say. Try to be patient, and let people express themselves; however you can help direct the conversation by asking key questions so the person will be able to get to the point, and provide the information you need to assist him or her.

10. **Do not solicit business from people using the SHC.** Attorneys who volunteer may be asked for business cards from those whom they are assisting. It is vital that you do not give people your business card or refer them to your office while volunteering for the court. We must refer people to the Lawyer Referral Service, or other non-profit legal services organizations, but not to private attorneys, firms, or independent paralegals or legal document preparers.
11. **Let us know when you are available and unavailable to work.** We certainly appreciate any time you can give us, and do not require you “punch at clock”. However, we do request that you schedule the hours you will work in advance, and that you notify us if you will be unavailable during any time you have already committed to work. This way we can try to schedule coverage for Self-Help Services at all times.
12. **Do not allow food or drink in the centers.** If we are to maintain cleanliness and quality of the materials, we need to keep people from eating or drinking in the centers. We can direct people to the snack bar or the bench in the hallway, and ask them to finish their food or drink before using our services.
13. **Keep an eye on the materials as to minimize theft.** Unfortunately we have experienced theft of some of our materials. Maybe people take things inadvertently, and then are afraid to return them, or maybe they take things intentionally. In either event, we need to watch people to make sure they return materials.  
  
Our Nolo Press books have disappeared and they now are kept behind the clerk’s desk. Before giving one of these books to a person using the Center we need to take a driver’s license or identification card to hold as security.
14. **Ask people to supervise their children.** Children often get restless in the center, and can easily damage equipment and/or disrupt other people using the services, if they are not supervised. We have books and toys for the children to use while they are in the center, and they may take a book with them when they leave. If someone has brought in a child to the center that is disrupting the work of others we should ask them to keep their child quiet and controlled or come back when they have someone to watch their child.