

EVICTION LEGAL HELPLINE – PRE-INTAKE CHEAT SHEET

Click the **Accept** button at the top of the case record to make yourself the owner. Then review the voicemail transcription or Request for Services in the **Description** field of the INITIAL DESCRIPTION section.

1. Out of Scope Due to Helpline Guidelines

IF the caller/person requesting services is...

- A landlord or landlord's representative
- A third party calling on someone else's behalf
- Seeking assistance with anything besides an eviction case (such as financial assistance or help with a legal matter besides eviction)

OR if the caller/person requesting services

- Does not leave a message and/or clearly state their FIRST and LAST name
- Already has an existing case or **Contact** associated with their name

THEN enter a **Date of 1st Message to ELH**, enter **Out of Scope** as the **Contact Name** and select the existing **Out of Scope** contact from the dropdown menu. Then click **Assign to Queue**.

2. Out of Scope Due to Helpline Availability

IF the caller/person requesting services...

- Does not have an upcoming court date or sheriff's eviction ([check online court records](#) to confirm; in order for a sheriff's eviction to be scheduled, there should be a Judgment for Possession entered AND a Writ of Eviction issued)
- Has an upcoming court date or sheriff's eviction, but we no longer have availability for the date of their deadline (refer to our [Daily Cases Spreadsheet](#) to see if we have spots available)

THEN complete the following Pre-Intake steps: create a **Contact**, add **Landlord, Address, Jurisdiction,** and **Court Record** information, and note their **Important Upcoming Date/Type**. **DO NOT RUN THE CONFLICT CHECK**. Return the case to the queue.

3. In Scope Cases

IF the caller/person requesting services...

- Has an upcoming court date or sheriff's eviction scheduled (confirm using [online court records](#)) **AND**
- We have spots available for the date of their deadline (confirm on the [Daily Cases Spreadsheet](#)) **AND**
- We do not have any existing cases or **Contact** records under their name

THEN complete all Pre-Intake steps and run the **Conflict Check**. Remember to record their **Important Upcoming Date/Type, Jurisdiction,** and **Court Records** information, and if applicable, select **Urgency** criteria. Return the case to the queue.

Email ELHsupervisor@gmail.com with any questions or concerns.