

Submitting and receiving document electronically and iFax modification



Submitting and receiving documents electronically, and iFax modification

Title: Submitting and receiving documents electronically and iFax modification
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Table of Contents

Submitting and receiving document electronically and iFax modification.....	1
1. Purpose.....	1
2. Updates.....	1
3. Submitting documents to LAO	2
4. Mails and Correspondence	10
4.1 Documents submitted to LSP.....	10
4.2 Documents received from LSP	13
5. iFAX modifications.....	15

Submitting and receiving documents electronically, and iFax modification

1. Purpose

The purpose of the job aid is to provide instructions on how to submit and/or receive electronic documents to/from *Legal Aid Online*, and the sending of documents to LAO using iFAX.

2. Updates

Effective December 3, 2012, *Legal Aid Online* users will be able to send the following documents via *Legal Aid Online* and ifax. The documents will be automatically sent to the appropriate department based on document type selected. To avoid delays in processing, please ensure the correct document type is selected.

- ACU Response
- Case Management – Family
- Case Management – Criminal
- Big Case Management Form

Effective April 1, 2012, using the new functionality in *Legal Aid Online*, users will be able to generate and send the following notices to LSP.

- Invoices
- Request for Review of Discretion Decision
- Correspondence with Respect to Account Entry or Account Payment Errors
- Disbursement Request for Authorization
- General Correspondence
- Dockets and Private Dockets

- Request to Expedite Payment
- Review of Settled Accounts

This enhancement to the Solicitor Portal will eliminate the need for mailing and faxing of these documents. Using this new functionality, will provide historical records that can be easily accessed and printed.

Important notice

Dockets must be submitted as attachments to an account. Only forward dockets through the "Submit documents electronically to LSP" section if they cannot be forwarded as attachments to an account.

3. Submitting documents to LAO

To submit electronic documents to LAO, please follow this simple process:

1. Select the "**Communication**" tab and then select the "Submit documents electronically to LSP" link (highlighted in Figure 1).

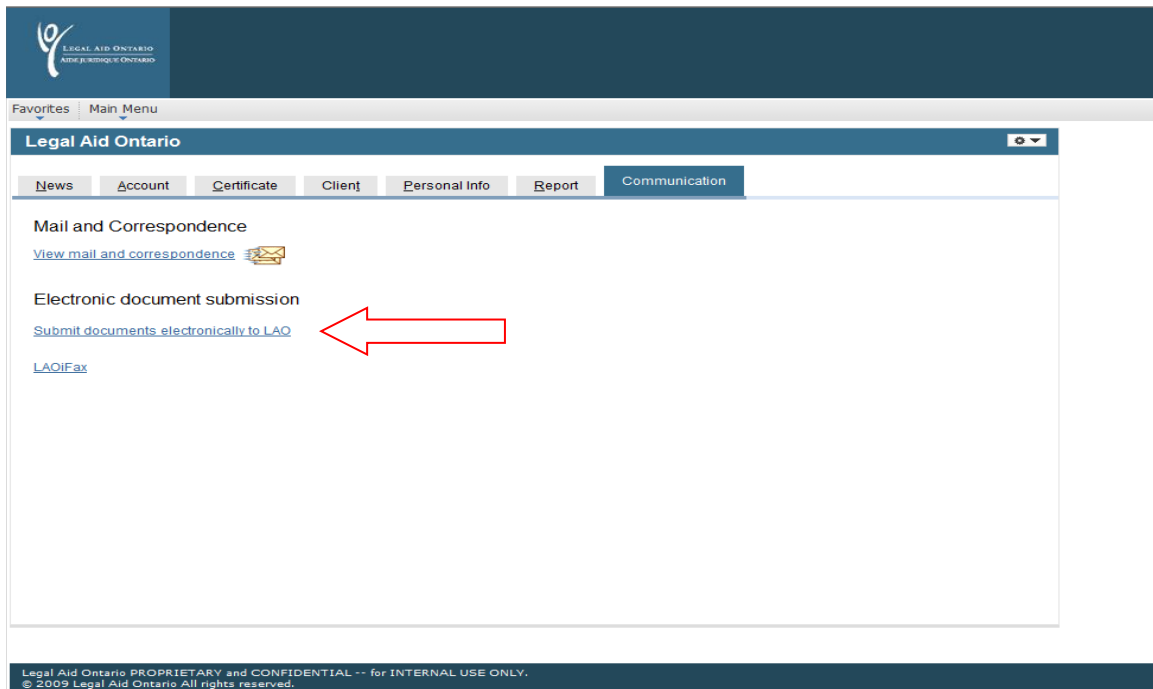


Figure 1: The "Submit documents electronically" link under the "Communication" tab in *Legal Aid Online*

2. After selecting 'Submit documents electronically to LSP' a new page will appear.

Enter Certificate number and select "Search" (highlighted in Figure 2 below). You will be taken directly to "Certificate Information Page" (highlighted in Figure 5 below).

LSP Document Attachments

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Certificate Number:

Name Display:

Certificate Issue Date:

Case Sensitive

[Basic Search](#)




Figure 2: The LSP document attachment certificate number search area

3. After selecting "Search" the "Search Results" page will display (highlighted in Figure 4 below). Select the appropriate Certificate.

Search Results

View All First 1-77 of 77 Last

Certificate Number	Name Display	Certificate Issue Date
CE	La	01/30/2002
CE	Co	06/02/2003
CE	Da	07/02/2003
CE	Ta	12/05/2002
CE	Ju	07/18/2005
CE	Rc	01/11/2008
CE	Gr	02/22/2008
CE	Be	03/04/2008
CE	Co	03/05/2008
CE	Rc	10/01/2008
CE	Pa	06/19/2009
CE	Kr	00/04/2000





Figure 3: Search results page and selecting appropriate Certificate


- Once the appropriate Certificate is selected from the 'Search Results' the "Certificate Information Page" will be displayed (highlighted in Figure 5 below). Select the magnifying glass icon next to the "Document Code" field (indicated by the arrow in Figure 5 below).

Doc Attachment



 **Certificate Information Page** July 20, 2015


Cert Info


Client Number:	CLT	Client Name:	Lasname,Firstname
Certificate Number:	CE	Intake ID:	
Issue Date:	08/03/2001	Effective Date:	08/03/2001
Acknowledge Date:	08/20/2001	Certificate Status:	Terminated
Young Offender Flag:	N	CA Flag:	N



Documents Attached / Pièces jointes

Attached File	Description	Document Code	Document Type	Add Attachment		
1	<input type="text"/>	<input type="text"/>			Add New	Delete

Historical Attachment/Historique des pièces jointes Personalize | Find | View All |  | First 1 of 1 Last

Attached File	Description	Document Type	Date submitted	View Attachment
1 LSP_BA_Escalation_Processs.pdf	Test Document	Request to Expedite Payment	07/20/15 2:55:29PM	

[Click here to print/Clic à imprimer](#)

Figure 4: Certificate Information Page – selecting Document Code

- Once the Document Code look up has been selected. A new page will appear titled “Look Up Doc Code (highlighted in Figure 6 below). Select the appropriate document type that you are sending to LAO.

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Favorites | Main Menu > EzDoc - LSP

All Certificate related correspondence for Lawyer Services & Payments (including BCM and PCU)

LSP Personalize | Find | First 1-8 of 8 Last

	Document ID	Document Name
1	<input type="checkbox"/> 1	Invoices
2	<input type="checkbox"/> 2	Request for Review of Discretion Decision
3	<input type="checkbox"/> 3	Correspondence with Respect to Account Entry or Account Payment Errors
4	<input type="checkbox"/> 4	Disbursement Request for Authorization
5	<input type="checkbox"/> 5	General Correspondence
6	<input type="checkbox"/> 6	Dockets and Private Dockets
7	<input type="checkbox"/> 7	Request to Expedite Payment
8	<input type="checkbox"/> 9	Review of Settled Accounts

Responses to the Audits & Compliance Unit

ACU Personalize | Find | First 1 of 1 Last

	Document ID	Document Name
1	<input type="checkbox"/> 11	ACU Response

Mid-level Case Management Assessment Forms Only

Use this form when you are requesting a budget for Mid-Level Case Managed matters (anticipated total cost of fees and disbursements to exceed \$8,000)

MCM Personalize | Find | First 1-2 of 2 Last

	Document ID	Document Name
1	<input type="checkbox"/> 18	Case Management - Family
2	<input type="checkbox"/> 19	Case Management - Criminal

Big Case Management form

Use this form when you are requesting a budget for Big Case Managed matters (anticipated total cost of fees and disbursements to exceed \$20,000 or \$30,000 for murder)

BCM Personalize | Find | First 1 of 1 Last

	Document ID	Document Name
1	<input type="checkbox"/> 20	Big Case Management Form

Figure 5: the “Look Up Doc Code” page

Important notice

Be sure to select the correct document type. Document types #1 to #9 will be automatically directed to Lawyer Services and Payments. New document types #11 to #14 will be directed to the appropriate department as indicated by the Document Name.

6. Once the document type is selected, enter any information pertaining to this document into the "Description" field (highlighted in Figure 7 below).

Documents Attached / Pièces jointes				
Attached File	Description	Document Code	Document Type	Add Attachment
1	<input type="text" value="enter description"/>	7	Request to Expedite Payment	Add New Delete

Figure 6: Description field – allow further comments about the document being sent to LSP

7. After the 'Description' information has been provided, select the paper clip icon under the "Add Attachment" heading (highlighted in Figure 8 below).

Documents Attached / Pièces jointes				
Attached File	Description	Document Code	Document Type	Add Attachment
1	<input type="text" value="enter description"/>	7	Request to Expedite Payment	Add New Delete

Figure 7: Selecting 'Add Attachment' icon

8. Once the 'Add Attachment' icon is selected, new page displays with "Browse", "Upload", and "Cancel" (highlighted in Figure 9 below). Select "Browse".

Figure 8: Selecting 'Browse' button

9. After selecting “Browse”, a new page will display allowing you to select the document you want to send to LSP from your computer system (highlighted in Figure 10 below).

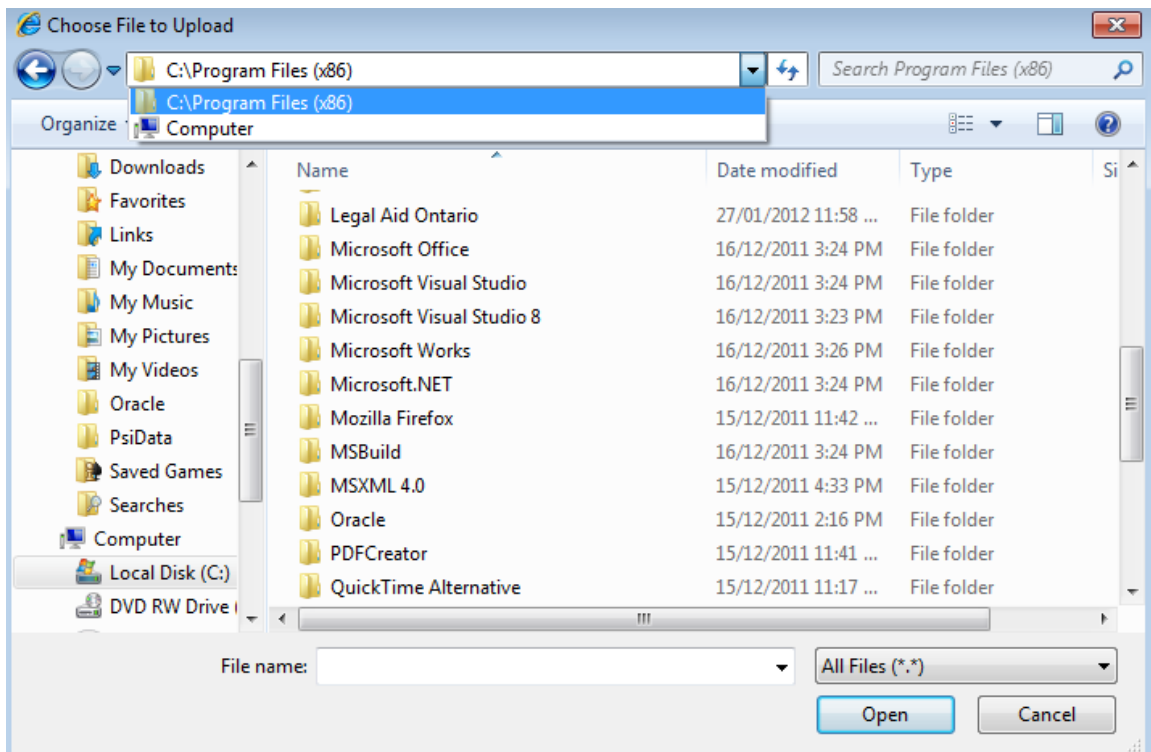


Figure 9: Browsing for files through Windows explorer to select a document

10. Once the document is selected, the file name will display in the section before the “Browse” button. The next step is to select the “Upload” button (highlighted in Figure 11 below).

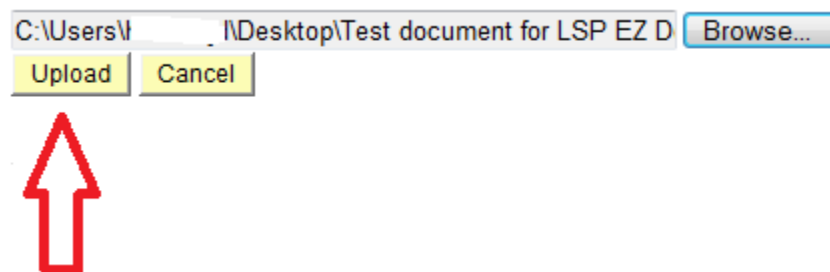


Figure 3: Selecting ‘Upload’

11. If a second document is required for the same certificate; select “Add New” (highlighted in Figure 12 below) and follow Steps 4 through 10.

Documents Attached / Pièces jointes				
Attached File	Description	Document Code	Document Type	
1 Test_document_for_L SP_EZ_Docs.docx	<input type="text" value="enter description"/>	7 <input type="text"/>	Request to Expedite Payment	Add New Delete



Figure 41: adding multiple documents

12. After all documents for the particular certificate are ‘Uploaded’, select the “Submit” button (highlighted in Figure 13 below).

Documents Attached / Pièces jointes				
Attached File	Description	Document Code	Document Type	
1 Test_document_for_L SP_EZ_Docs.docx	<input type="text" value="enter description"/>	7 <input type="text"/>	Request to Expedite Payment	Add New Delete



Figure 5: submitting documents to LSP

13. Once the “Submit” button is selected a confirmation message will be displayed (highlighted in Figure 14 below).

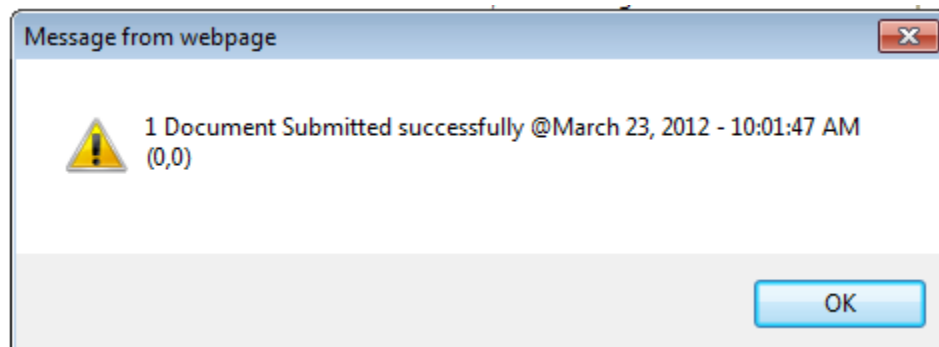





Figure 6: Confirmation message – document successfully sent to LSP

14. Also the 'Historical Attachments' section will display all successfully submitted documents for the particular certificate (highlighted in Figure 15 below). If you wish to view the document simply select "View Attachment" icon.

Historical Attachments / Les pièces jointes historiques					Customize Find View All 	First
					1 of 1	Last
Attached File	Description	Document Type	Date submitted	View Attachment		
1 Test_document_for_LSP_EZ_Docs.docx	enter description	Request to Expedite Payment	03/23/12 10:01:48AM			

[Return/Retour](#) [Click here to print/Clic à imprimer](#)

Figure 7: Historical Attachments section and viewing submitted documents

4. Mails and Correspondence

To view all documents you have sent to Lawyer Service & Payments or have received from LSP please follow these simple steps.

4.1 Documents submitted to LSP

1. Navigate back to "Communication" tab and access the "View mail and correspondence" link.(highlighted in Figure 1 below).

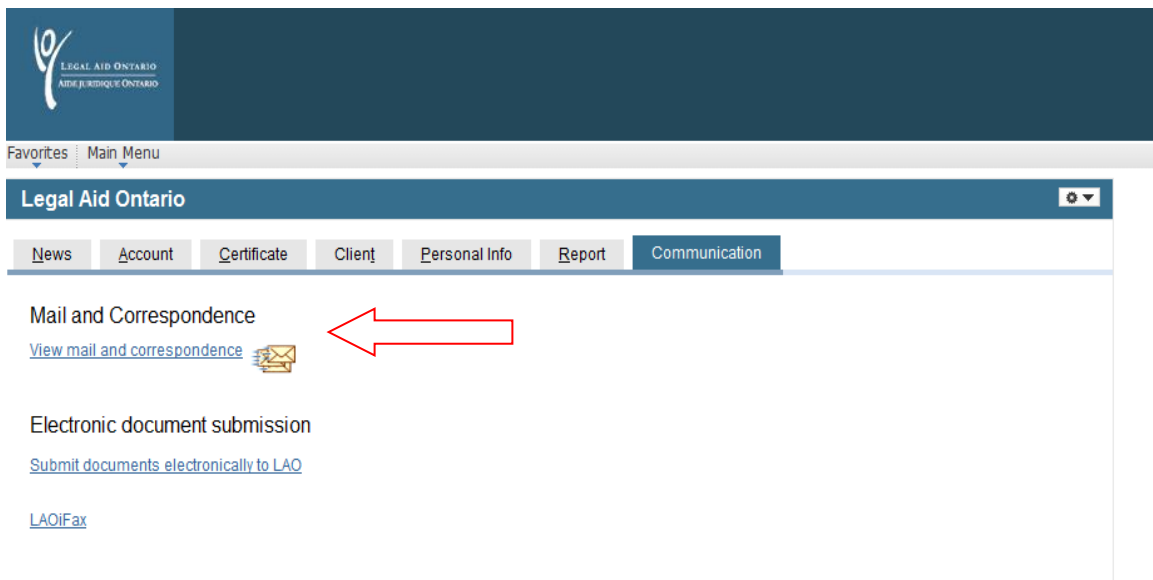


Figure 8: The "view mail and correspondence" link in the "Communication" tab in *Legal Aid Online*

- After selecting 'View mail and Correspondence', the "LAO Messaging System" page will display. Select a new link named "Documents Sent to LAO" (highlighted in Figure 2 below).

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Favorites | Main Menu > Mail and correspondence

LAO Messaging System

LAO Messaging System/Système de messagerie d'AJO

April 14, 2015

Un-Read Messages Summary/Sommaire des messages non lus

EFT - Deposit Advice / TEF- Avis de dépôt	4	You have received a Deposit Advice Notice. Please go to the Electronic Fund Transfer (EFT) – Deposit Advice Page to access this Notice. / Vous avez reçu un avis de dépôt. Pour y accéder, veuillez consulter la page intitulée Transfert électronique de fonds (TEF) - Avis de dépôt.
Certificate Notice	16	You have received a Certificate Notice. Please go to the Certificate Amend/Authorization Page to access this Notice. / Vous avez reçu un avis au sujet d'un certificat. Veuillez vous rendre à la page d'accueil du site et cliquez sur Certificate Amend/Authorization pour lire l'avis.
Hardcap Notice/ Avis sur la limite de facturation annuelle	0	
Action Required	4	Urgent action required for certificates and/or cases.
Documents Sent to LAO/Documents envoyés à AJO	0	
Attached Documents / Documents joints	3	You have received a document from Lawyer Service Payments. Please click the link to view correspondence. / Vous avez reçu un document des Services aux avocats et paiements. Veuillez cliquer sur le lien pour lire votre correspondance.

Reminder: You have 27 unread Message(s).
Rappel : Vous avez 27 message(s) non lu(s).

Return/Retour

Figure 9: The "Documents Sent to LAO" link in the LAO messaging system

- A new page displays, which provides further confirmation that document(s) were successfully sent to LSP (highlighted in Figure 3 below).

LAO Messages

Supplier ID: Demonstration July 20, 2015

Attachments sent to LAO

Personalize Find View All [Print] [Refresh]						First	1-6 of 45	Last
	Delete/Effacer		From/DE	Subject/Objet		Received/Reçu	Read/Lu	
1	<input type="checkbox"/>			CE - 1 Document sent to LSP on July 20, 2015 - 02:55:29 PM		07/20/2015 2:55:30PM		
2	<input type="checkbox"/>		CE	09:14:56 AM - 1 Document sent to LSP on May 27, 2015 -		05/27/2015 9:14:55AM		
3	<input type="checkbox"/>		CE	09:14:22 AM - 1 Document sent to LSP on May 27, 2015 -		05/27/2015 9:14:21AM		
4	<input type="checkbox"/>		CI	11:50:34 AM - 1 Document sent to LSP on March 10, 2015 -		03/10/2015 11:50:33AM		
5	<input type="checkbox"/>		CE	2015 - 12:20:11 PM - 1 Document sent to LSP on January 29, 2015 -		01/29/2015 12:20:11PM		
6	<input type="checkbox"/>		CE	2014 - 03:44:03 PM - 1 Document sent to LSP on October 10, 2014 -		10/10/2014 3:44:03PM		


[Delete](#)

English / Français [Back to Messaging System](#)

Subject: CE - 1 Document sent to LSP on July 20, 2015 - 02:55:29 PM

Date Sent: July 20, 2015 - 02:55:30 PM

To: Lawyers Service & Payments (LSP) From: DEMO



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AIDE JURIDIQUE ONTARIO

LSP_BA_Escalation_Processs.pdf (Request to Expedite Payment) submitted @ July 20, 2015 - 02:55:29 PM

[Click here to print/Clic à imprimer](#)

English / Français [Back to Messaging System](#)

Figure 10: Confirmation document sent successfully

4.2 Documents received from LSP

1. Access 'View mail and Correspondence' link as illustrated in Figure 1. Select a new link named "Attached Documents"; you will see the parallel text box will provide a message stating you have received document(s) from LSP (highlighted in Figure 4 below).

The screenshot displays the LAO Messaging System interface. At the top left is the logo for Legal Aid Ontario (Aide Juridique Ontario). Below the logo is a navigation bar with 'Favorites', 'Main Menu', and 'Mail and correspondence'. A header bar reads 'LAO Messaging System'. The main heading is 'LAO Messaging System/Système de messagerie d'AJO' with the date 'April 14, 2015'. The section is titled 'Un-Read Messages Summary/Sommaire des messages non lus'. A table lists various message categories with counts and associated actions:

Message Category	Count	Action/Message
EFT - Deposit Advice / TEF- Avis de dépôt	4	You have received a Deposit Advice Notice. Please go to the Electronic Fund Transfer (EFT) – Deposit Advice Page to access this Notice. / Vous avez reçu un avis de dépôt. Pour y accéder, veuillez consulter la page intitulée Transfert électronique de fonds (TEF) - Avis de dépôt.
Certificate Notice	16	You have received a Certificate Notice. Please go to the Certificate Amend/Authorization Page to access this Notice. / Vous avez reçu un avis au sujet d'un certificat. Veuillez vous rendre à la page d'accueil du site et cliquez sur Certificate Amend/Authorization pour lire l'avis.
Hardcap Notice/ Avis sur la limite de facturation annuelle	0	
Action Required	4	Urgent action required for certificates and/or cases.
Documents Sent to LAO/Documents envoyés à AJO	0	
Attached Documents / Documents joints	3	You have received a document from Lawyer Service Payments. Please click the link to view correspondence. / Vous avez reçu un document des Services aux avocats et paiements. Veuillez cliquer sur le lien pour lire votre correspondance.

Below the table, a red arrow points to the 'Attached Documents / Documents joints' link. A red text box states: 'Reminder: You have 27 unread Message(s). Rappel : Vous avez 27 message(s) non lu(s)'. At the bottom center is a 'Return/Retour' button.

Figure 11: The "attached documents" link in the LAO messaging system

- After the 'Attached Documents' link is selected, the "LAO Message" page appears. Documents sent from LSP are listed in the InBox Messages. The highlighted document will provide the link to access the document sent from LSP (highlighted in Figure 5 below).

LAO Messages

Supplier ID: Demonstration July 20, 2015

InBox Messages

Personalize | Find | View All | First 1-6 of 16 Last

	Delete/Effacer		From/DE	Subject/Objet	Received/Reçu	Read/Lu
	<input type="checkbox"/>		LSP	ACU Response	03/17/2015 8:09:51AM	
2	<input type="checkbox"/>		LSP	ACU Response	03/09/2015 3:57:13PM	
3	<input type="checkbox"/>		LSP	General Correspondence	10/01/2014 4:56:44PM	
4	<input type="checkbox"/>		LSP	General Correspondence	09/08/2014 3:06:47PM	
5	<input type="checkbox"/>		LSP	Invoices	03/25/2014 2:02:09PM	
6	<input type="checkbox"/>		LSP	Disbursement Request for Authorization	11/03/2013 1:36:07PM	

Delete

Back to Messaging System


Subject: ACU Response

Date Sent: March 17, 2015 - 08:09:51 AM

To: - DEMO From: LSP -

For Cert #CE

Comment/Commentaire: ACU - Reassessment response

Link: [ACU Response --- Réponse au SVC](#) 

Back to Messaging System

Figure 12: InBox Message page with links to documents received from LSP

5. iFAX modifications

This section will illustrate the slight modifications iFAX has undergone.

1. Access LAOiFAX from the “Communication” tab (highlighted in Figure 1 below).

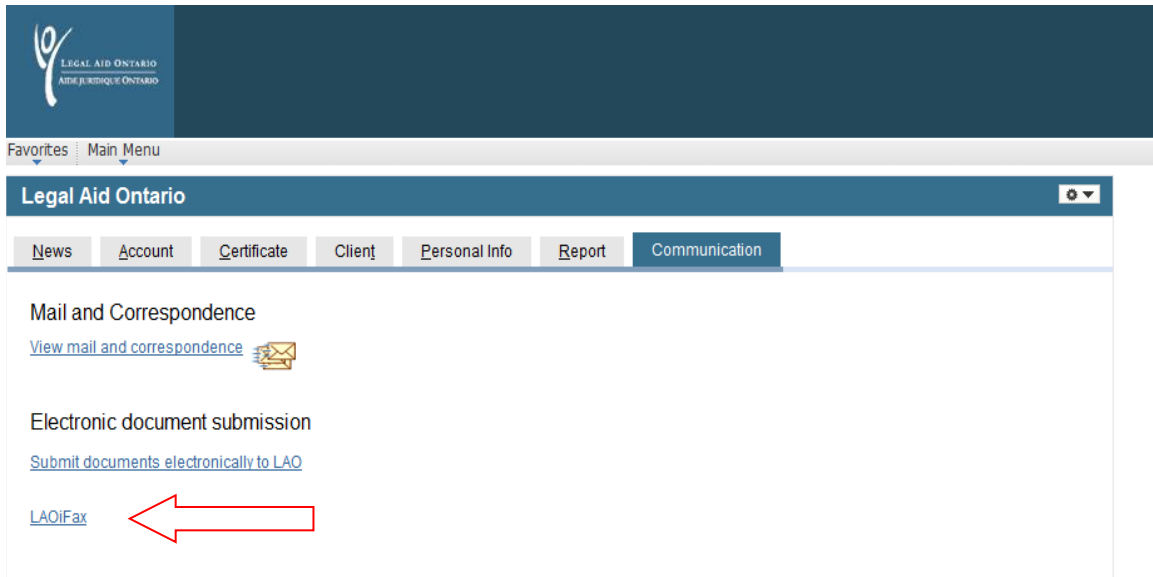



Figure 13: The “LAO iFax” link in the “Communication” tab

2. After selecting the 'LAOiFax' link, the iFAX cover page will display with your phone and fax information already entered (highlighted in Figure 2 below).

LAOiFAX

From/De:

Vendor/Avocat(e): 46

Telephone/Téléphone: 416/598 

Fax/Télécopieur: 416/924 

To/À:

Legal Aid Ontario/Aide juridique Ontario

Fax/Télécopieur: (416) 979-8562

Date: March 23, 2012

Number of Pages/Nombre de pages:

(including this page)

***Document Type/Type de document**



***Certificate/Certificat:**



Add to Worklist flag for iFax

Figure 14: iFAX cover page

3. Select "Document Type" look-up (highlighted in Figure 3 below).

***Document Type/Type de document**

***Certificate/Certificat:**



Add to Worklist flag for iFax

Look up Document Type/Type de document (Alt+5)

Figure 15: Document Type look-up

- After Document Type look-up is selected, a new page displays with all document types available for selection (highlighted in Figure 4 below).



Figure 16: Shows the “Look Up Document screen” that appears after the Document Type look-up is selected

- After the document type is selected, the certificate number is required. You can enter the certificate number directly into the field or select certificate look-up and pick appropriate certificate from list (highlighted in Figure 5 below).

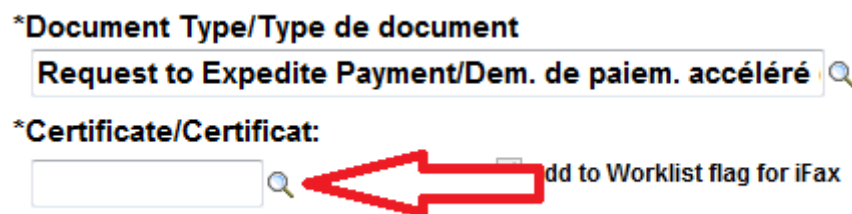


Figure 17: Entering Certificate information

6. After all fields have been entered, select Print icon (highlighted in Figure 6 below).



Figure 18: Print icon

Important notice

Always use the above print icon to print the iFax cover page. Using the browser print functionality will not enable the special encoding required for Ifax.

7. Send iFAX cover page along with associated document(s) to Legal Aid Ontario's iFAX number (highlighted in Figure 7).

To/À:

Legal Aid Ontario/Aide juridique Ontario

Fax/Télécopieur: (416) 979-8562



Figure 19: Legal Aid Ontario iFAX number: 416 979-8562

Important notice

Lawyer Services & Payments electronic documents are submitted in the following formats: **.pdf, .doc, .docx**.

Any iFAX coversheets printed prior to April 1st, 2012 will **not** reach LSP. Please print a replacement coversheet and sent to LSP to ensure no issues arise.