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SMCBA Lawyer Referral Service Program
Operational Procedures

The purpose of this document is to provide you with an insight on how the LRS Program operates. The document highlights the LRS rules and procedures, what you can expect from the program, and what we need and expect from you.

What the LRS Program Does:

- **Referrals:** The LRS Program refers potential clients of San Mateo County and Santa Clara County to panelists based on legal need.
- **Rotation:** Referrals are made on rotation to ensure an equitable distribution of referrals among similarly situated panelists.
- **Non-Discriminatory Organization:** The LRS Program does not discriminate on the basis of race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, gender identity, general expression, sexual orientation, age, military and veteran status, or other category of discrimination prohibited by applicable law, whether the category is actual or perceived. All our clients should be treated considerately and respectfully.
- **Processing:** LRS Program staff tells potential clients:
    - They are entitled to an initial consultation of up to 30 minutes for a $35, non-refundable fee, payable in advance via credit card to the LRS Program.
    - The attorney has up to five (5) business days to call the client back and conduct a consultation by telephone, zoom, or in person.
    - The initial consultation is an opportunity for the client to explain the general nature of the legal problem, for the attorney to explain his/her fee structure and to determine if the case is one he/she wishes to pursue.
    - The attorney's regular hourly rate may apply after the first 30 minutes.
    - The attorney is not obligated to provide services beyond the initial consultation.
    - All fees beyond the initial consultation will be as agreed between the potential client and the attorney.
    - If you are operating in both San Mateo County and Santa Clara County, you will receive referrals for clients in both counties.
- **Follow up:** After processing a referral, a confirmation is emailed to the attorney. LRS will also send referral confirmations and follow-up surveys to potential clients referred by the LRS Program.

What the LRS Program Client Expects From You:

- When the client contacts the LRS Program and pays the $35 referral fee, he/she reasonably expects to speak with you for up to 30 minutes in accordance with LRS Rule 8.1 and 9.1.
- If it turns out the referral is outside of your scope of expertise or you are unable to meet with the client, the client should be advised to seek a re-referral through our service. Do not refer the client to a partner, colleague, or another attorney.
- If after consulting with the client, your analysis of the facts leads you to conclude that you will not be providing further services, it is important that the client understands your reasoning and the legal options available to them.
- Pursuant to LRS Rule 9.3, if both you and the client agree to continue consulting beyond the initial 30-minute consultation, you must make it clear to the client(s) what additional fees will apply.

What We Need From You:

- Notify us at least one (1) week in advance if a court appearance, vacation, or other long-term, out-of-the office commitment will prevent you from accepting referrals. We track those dates and will not refer callers during that timeframe.
- Contact us immediately at **LRSAttorney@smcba.org** if we inadvertently refer a client to you whose needs are outside your area of expertise. We will provide the caller with another referral at no charge.
- Schedule a consultation with the client within five (5) business days of their call to you.
- Meet with the client yourself by telephone, zoom, or in person for up to one-half (½) hour. **LRS Rules prohibit the initial consultation to be provided by your associates or paralegals.**
- Renew your Errors and Omissions insurance promptly. While the LRS Program will try to remind you that your E&O insurance is about to expire, we will automatically (temporarily) suspend referrals if your updated insurance information has not been received. The LRS Rules prevent us from making referrals without proof of current E&O insurance.
- Respond promptly to the status reports we send to you – it helps us track what happened to the client after the referral.
- Promptly pay any referral fees due to the LRS Program. If the client decides to retain your services, you are required to update our office and remit 15% of the fees you collected for the services rendered. The LRS Program receives 15% of **all** fees paid on LRS referrals - due and payable to the LRS Program when the client pays you. If the **total** fees collected are less than $100, no money is due to the LRS Program.

I hope this overview helps you better understand the LRS Program process. Please feel free to contact the LRS Program Coordinator by email at **LRSAttorney@smcba.org**, should you have any questions about the LRS Program.