

**ANNEX A
PROGRAM COMMITMENTS
LEGAL SERVICES**

NAME OF AGENCY: _____

CONTRACT NUMBER: _____ **CONTRACT TERM:** ___/___/___ TO ___/___/___

BUDGET MATRIX CODE: 28 **BUDGET MODIFICATION NO:**
(0 = Original) _____

1. Average Caseload (per full-time direct service equivalent):

Per Advocate Per Attorney

2a. Number of Clients WITH a signed representation agreement receiving Legal and Advocacy Counseling:

2b. Number of Staff Contacts:

LEGAL(Attorney) ADVOCACY(Paraprofessional)

a. Face-to-Face with Client

b. Telephone with Client

c. Collateral Face-to-Face

3a. Number of Clients WITHOUT a signed representation agreement receiving Legal and Advocacy Counseling:

3b. Number of Staff Contacts:

LEGAL(Attorney) ADVOCACY(Paraprofessional)

a. Face-to-Face with Client

b. Telephone with Client

c. Collateral Face-to-Face

4. Number of New Social Security Cases Accepted by Referral Source:

a. State and County Hospitals

c. DMHAS Funded Residential Programs

b. State/County Hospitals (Denials Only)

d. All Others

5. Number of New Entitlement Episodes:

a. Social Security Eligibility Cases

c. Other Entitlement Eligibility Cases

b. Social Security Continuing Cases

d. Other Entitlement Continuing Cases

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6. Number of New Non-Entitlement Episodes:

a. Housing Issues

c. Family Issues

b. Consumer Issues

d. Other Issues

7. Entitlement Cases Outcomes:

**Favorable
Decisions**

**Unfavorable
Decisions**

- a. Social Security Eligibility Cases
- b. Social Security Continuing Cases
- c. Other Entitlement Eligibility Cases
- d. Other Entitlement Continuing Cases
- e. Entitlement Cases Pending/In Progress

ANNEX A LEGAL SERVICES

Legal assistance provided to mental health clients, either through agency referrals or self-referral, by a network of DMHS-funded legal service agencies. Assistance may include advice and guidance, case coordination, and court representation for issues such as government entitlements, housing, evictions, employment, etc.

1. **AVERAGE CASELOAD:** Average caseload will be reported by a “full-time equivalent” direct service level. This is determined by assessing the amount of time devoted to direct client services exclusive of supervisory and broad systems advocacy activities.
2. **SIGNED REPRESENTATION AGREEMENT CLIENTS:** Such persons are NJ residents and financially eligible for services and they or a family member have a mental health history or are currently receiving mental health services from another agency. These clients will sign a “Representation Agreement”, will have a USTF record and require a Face-to-Face contact with an attorney or para-professional in order to be counted under this category of service.
3. **NO SIGNED REPRESENTATION AGREEMENT CLIENTS:** Such persons are NJ residents and financially eligible for services and they or a family member have a mental health history or are currently receiving mental health services from another agency. These clients will not have a signed “Representation Agreement”, will not have a USTF record and do not require a Face-to-Face contact with an attorney or para-professional in order to be counted under this category of service.

2a/3a. LEGAL AND ADVOCACY COUNSELING: Occurs when an Attorney or Advocate provides substantive legal information to persons affected by mental illness, or those inquiring on their behalf. This information may include, but is not limited to, laws and regulations regarding public entitlements, housing issues, boarding home residents rights, family law, consumer issues, discrimination and other legal issues. Counseling episodes may also be delivered in such a way as to promote the self-advocacy skills of the person seeking legal assistance. Counseling may also include referral to and/or information regarding mental health and social service providers. In some cases where feasible and appropriate, counseling may include a limited number of contacts with third parties on behalf of a client in order to resolve legal matters or assist the client in self-advocacy.

2b/3b. NUMBER OF STAFF CONTACTS: Refers to the number of contacts with a client or on behalf of a specific client provided by an attorney or advocate. **A CONTACT IS 15 CONTIGUOUS MINUTES FOR EACH FACE-TO-FACE, TELEPHONE AND/OR COLLATERAL CONTACT.**

4. Self-explanatory.
5. **NEW ENTITLEMENT EPISODES:** Includes all new cases that were initiated during the quarter. The episodes can include either an issue defined at intake of a new client or an entitlement issue that arises during the course of service to an active client initially enrolled for an unrelated legal problem.

The four categories include all financial entitlements available to clients with social security cases identified separately and the status of the client in regards to the entitlement specified. Entitlement Cases will include only those cases in which the eligibility for entitlement is at stake. Therefore, clients in this category either are not receiving the indicated entitlement or are threatened with its termination. Continuing Cases are all cases that are related to the receipt of entitlements, including issues or recoupment of overpayment, reduction of benefits, and other impediments related to the receipt or use of entitlements.

6. **NEW NON-ENTITLEMENT EPISODES:** Include all new cases that were initiated during the quarter. An episode of service can include either a non-entitlement issue identified at intake of a new client or a non-entitlement episode that arises during the course of services to an active client.

7. **ENTITLEMENT CASES OUTCOMES:** Indicates the terminal outcomes received during the reporting period of entitlement cases in each of the fur categories. Terminal outcomes are those which will be pursued no further. Therefore, do not report an unfavorable decision or adverse action which will be appealed. Most outcomes are cases for which no substantive outcome has been achieved. This category includes cases no pursued because of loss of contact with a client, client non-cooperation, the institutionalization of a client, etc.