



Clinic Quick Start Guide

First Edition: July 2024

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Get Designated

ECO designates community-based organizations as ECO Clinics. The process can take anywhere from 6 to 18 months. Most organizations need 12 months. The first step is to apply for an ECO Capacity grant. Along with the grant, you will get coaching to help you and your organization navigate the ECO designation process. When you have taken all the required steps you are ready to apply for an ECO designation.

Apply for ECO Capacity Grant: Grants are available from \$10,000 to \$100,000 to build organizational capacity to provide legal services through ECO.

Train staff for accreditation: Use an ECO Capacity grant to participate in trainings designated to teach your staff how to competently provide immigration legal services and moves your team along the pathway towards U.S. Department of Justice Recognition.

Create Policies & Protocols: Use template policies to guide your organization in developing core practices to provide legal services.

Purchase software & libraries: Use an ECO Capacity grant to purchase the software, tools, and law library materials you will need to have on hand.

Get insured: Use an ECO Capacity grant to purchase professional liability insurance – aka malpractice insurance. It protects the community against harm.

Obtain US DOJ Recognition: Use an ECO Capacity grant to support your application for DOJ-recognition. You will get technical support from the ECO Clearinghouse, including letters of recommendation, and access to the attorney supervisor necessary for successful federal recognition.

Launch pop-up ECO Clinics right now: While you are working toward your ECO designation, you can host pop-up ECO Clinics. ECO Clearinghouse staff will manage the clinics and provide legal services on site at your CBO. You & your team participate in the clinics including the logistics, the technology, shadowing, and face to face client interviewing under the supervision of training ECO lawyers and staff. It is a great way to get practice and delivers legal services rapidly to the community.



For questions & feedback about this guide, ECO clinics, or to find more information about ECO, go to www.EquityCorps.org

Planning & Organizing

Pick a Clinic or Workshop model: ECO offers two clinic models and one workshop model. You will need to decide what kind of clinic you will offer.

Prioritized or Hybrid?: ECO Clinics – regardless of the model – come in two different flavors: Prioritized or Hybrid. A Prioritized clinic means the individuals served are referred by the ECO Clearinghouse. A Hybrid clinic means at least 15% of the individuals served (and up to 60%) are managed by your organization. Remember: everyone served must be enrolled in ECO.

Determine your capacity: Every clinic requires at least 2 providers – attorneys or accredited representatives. You will also need support staff to schedule, upload, copy, translate, and process things. Good support staff is critical to a successful clinic. It is a 2 to 3 ratio. For every 2 providers, you need 3 support staff. Interpreters don't ordinarily count as support staff and should be separately accounted for.

Organize the calendar for at least 3 months – 90 days: Your clinic schedule should operate on a three-month rolling basis. If you are starting today, for example, you should plan your staffing and availability for the next 90 days. Once you are 30 days in, plan the next 30 days, so that you always have 90 days planned and on the calendar.

What's your guaranteed minimum availability?: Your availability must be predictable and transparent – that is a key aspect of the ECO ecosystem. The standard model uses a wave scheduling system, and a clinic day with 2 providers, could look like 3 x 3 x 2 x 2 – that is 9 appointments during the clinic, with 3 appointments the first hour, 3 the second, 2 the third hour, and 2 the final hour. More providers mean more appointments. You will have to figure out the minimum availability you can promise at each clinic – which should be at least 9 appointments. It is always easy to add availability later.

Scheduling & Staging

Accept referrals within 6 business hours: A few weeks before your clinic, ECO will send you all the referrals through the ECO Provider Portal. The referrals are sent on a particular date – you will know in advance. You will have up to 24 hours to accept the referrals. Ideally, you move faster than that and you accept the referrals within 6 business hours. Speed is important because it allows the system to flow and people to get the services they need. After 24 hours, any unaccepted referral is considered denied. Denial rates are publicly reported, so you only want to deny referrals for good reasons like a conflict of interest or a lack of capacity. A high denial rate might cause a clinic to lose its ECO designation.

Schedule the client: Automated messaging is sent to the client once you accept the referral saying you will be in touch within 24 hours. Better yet: contact the client the same day you accept the referral and schedule them! This is where good support staff comes in. Plan to spend time scheduling and setting client expectations.

Front-load the work: Do as much of the work ahead of time because all of the case work should be completed on Clinic Day. Communicate with each client. Set expectations. Most clinic appointments will last 2 to 4 hours. For Asylum Clinics, prepare the Part A of the I-589 in advance. For other services, scan the record and itemize a list of the documents the client should bring, or if the appointment is virtual, when they should submit them to you.

Stage the clinic: Do you have all the interpreters needed? Schedule interpreters for blocks of time, not appointments. Order lite refreshments for clients. Create a space for greeting clients and checking them in, a learning zone with a large format video monitor (recommended) to show instructional videos, and private easily accessible spaces for individual legal services. If you offer childcare, make those arrangements, too!

Document all the work: Document everything you do in the case management system – every phone call, every text message, every interaction, every thought, every action – if you don't document it, then it didn't happen. Seriously. Document everything.

Clinic Day

Communicate with clients: The ECO scheduling system will send reminder messages to clients. You should be prepared to support clients the day before the clinic if they have questions on how to arrive or last-minute requests to reschedule.

Call a huddle: Your team lead should gather everyone, describe the appointments and case types. Ask each person to describe their role for the day.

Pre-assign?: Most clinic appointments are not pre-assigned to providers. Instead, providers pick up cases in the order the client arrives. In some cases, pre-assigning is the right call, but be cautious and don't assume pre-assigning is faster. In fact, experience shows that it increases everyone's wait time and slows down the entire clinical day.

In person or virtual: In person appointments are clinical default model. It makes the process move faster overall and eliminates friction in communication. If clients cannot attend in person, consider scheduling a special virtual clinic only. Hybrid clinics (in-person and virtual) are hard to manage.

Go paperless: Get your team up to speed with Adobe Sign or DocuSign. Try to keep everything paperless and have clients sign electronically, scan documents right away in the portal, and follow the workflows.

Follow the workflows: Follow the workflows. Follow the workflows. Follow the workflows. Think of them like the playbook. Everyone has a part and the workflow keeps the individual providers and support staff making the same play together.

Wrap up all the case work on the day of the clinic: Don't let case work linger until the next day. Seriously. Manage your team so that all the case work is uploaded, all the data entry is completed, and everything is ready to submit the next day. If the client isn't ready with all the documents or the case requires more thought, either reschedule for another clinic or make the decision to refer to a full-service provider.

Get Paid

What steps do I take to get paid?: After the clinic, your team lead submits your invoices for the time spent. Use the ECO Provider portal to submit invoices. Follow the instructions on proper invoicing. If you do it right, then you will get paid generally within a few days. If you do it wrong, you will get your invoice sent back to fix.