**Te Ara Ture**

**Client Referral Process – Map (accessible word)**

1. Application Process
   1. Client makes application to Te Ara Ture
   2. Application includes:
      1. summary of matter and help required
      2. authority to share information and consent to privacy policy
      3. acceptance of costs and disbursements policy
      4. confirmation all previous retainers terminated
      5. eligibility test information
      6. identity and contact information
   3. Application Approved
2. Allocation via portal
   1. Te Ara Ture defines scope of work and creates opportunity in on-line portal
   2. Opportunity visible to provider only if area of law and location matches provider's portal profile
   3. Provider submits Expression of Interest
   4. Client's identity info released to provider
   5. Conflict Check done
   6. If conflict, matter reopened to other providers
   7. If no conflict, substantive material released for further assessment
   8. If matter declined by provider, matter reopened to other providers
   9. If matter accepted by provider, matter allocated in portal
3. Onboarding by Provider
   1. Client introduced to provider
   2. Client signs provider's Terms of Engagement, which incorporate:
      1. costs and disbursements policy
      2. scope of work
      3. authority to report to Te Ara Ture
   3. Legal work completed
4. Reporting to Te Ara Ture
   1. Provider reports information to Te Ara Ture provided it does not harm client's interests
   2. Te Ara Ture uses reporting information for planning, reporting and QA (provided it’s in non-identifiable form)