**WILL PROJECT**

**THE PROCESS**

1. At the beginning of each month, the Project Manager (PM) will contact CDEL to see how many cases they have for distribution
2. Upon hearing the answer, the PM will send an email out to the listserv of trained volunteers to see who is interested.
   1. Generally, the case go to the first people who respond.
   2. Sometimes it is important to consider other factors: new volunteers, someone who has not gotten a case in a while, etc.
3. When we know we have enough volunteers, CDEL will send the PM information about the cases
   1. Packet will contain
      1. completed will intake
      2. client’s contact information
      3. any additional information CDEL has to help the volunteer
   2. Client will be notified by CDEL that a volunteer attorney will be in touch
4. PM will then send an email to the potential volunteer with the client name and address to do a quick conflict check.
5. Once the PM hears back from the volunteer with no conflicts, she will disburse the wills to the volunteer attorney (VA), asking for a 2 week turnaround (or less). This email will include (this list will change once the volunteer portal is complete. At that time, you will just direc them to the portal for the templates)
   1. Will template
   2. TODI template
   3. Client agreement for VA to sign and return with the completed will
   4. A cheat sheet
   5. PBN will procedure
   6. All the documents we received from CDEL about this client.
6. VA will review the information and reach out to the client via phone to confirm all the intake information and ask any questions. Ideally all communication will be over the phone.
7. VA will draft the appropriate documents and forward to the PBN Subject Matter Expert (SME) for review
8. SME will review the documents and either:
   1. If corrections are necessary: send it back to the VA within 72 hours with corrections and/or questions, asking for a 48 hour turnaround for re-review
   2. If no issues: send it back to the VA, indicating that it is “good to go”
9. Once documents are complete… the VA will email the documents directly to CDEL with a signed attorney/client agreement and cc’ing the PM. Alternatively, the PM can send the documents off to CDEl and cc the VA.
10. As the PM, it is expected that you keep up with this process. Reaching out to the VA from time to time to make sure they are on schedule.