Job aid

Portal Attachment

A guide for Consent and Capacity Board/Ontario Review Board, Child and Family Services, Civil and Family Law Panel Lawyers

LEGAL AID ONTARIO
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Legal Aid Ontario

Title: Portal Attachment: A Job Aid for Consent and Capacity Board/Ontario Review Board, Child and Family Services, Civil and Family Law Panel Lawyers

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Contents

1. Purpose

The purpose of the job aid is to provide instructions on how to attach and submit electronic civil and family law documents via *Legal Aid Online*.

2. Updates

Effective May 29, 2017, lawyers will have the ability to submit documents for family, *Child and Family Services* Act (CFSA), Civil and Consent & Capacity Board (CCB) and Ontario Review Board (ORB) matters via *Legal Aid Online*. The documents are as follows:

- Opinion materials
- Authorization request materials
- Other material
- ORB/CCB Materials (note: this option is only available for ORB/CCB certificates)

3. Attaching and submitting documents to Legal Aid Ontario (LAO)

To attach and submit electronic documents to LAO, please follow this step by step process:

After you have log in to LAO Online Home Page

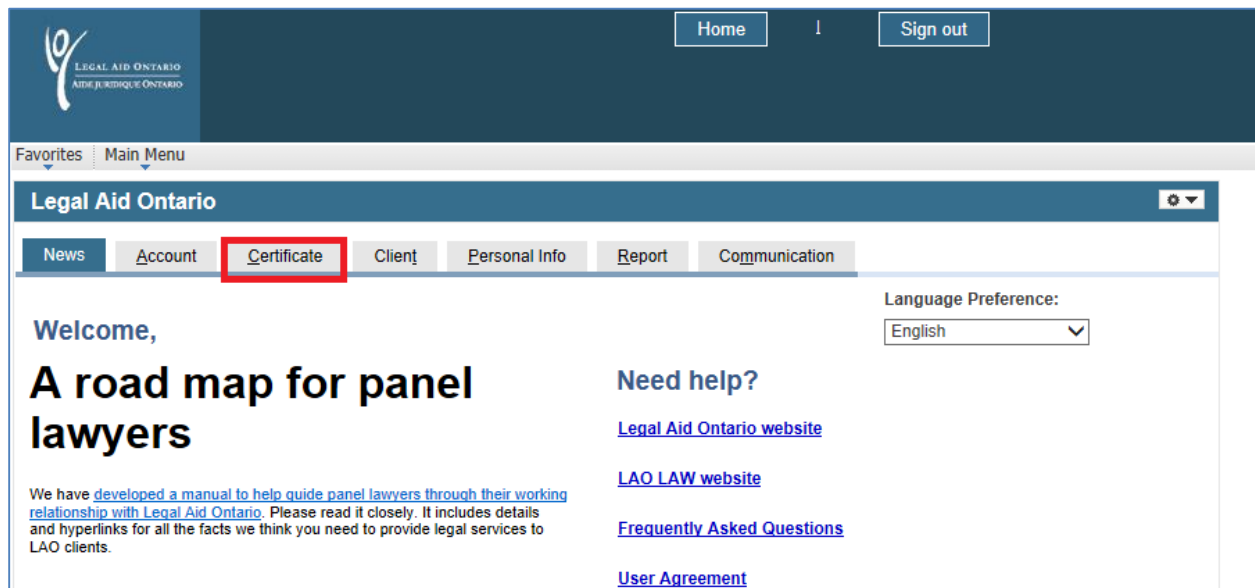1. From the LAO Online Home Page, click on the **Certificate tab**

Figure 1- Certificate tab

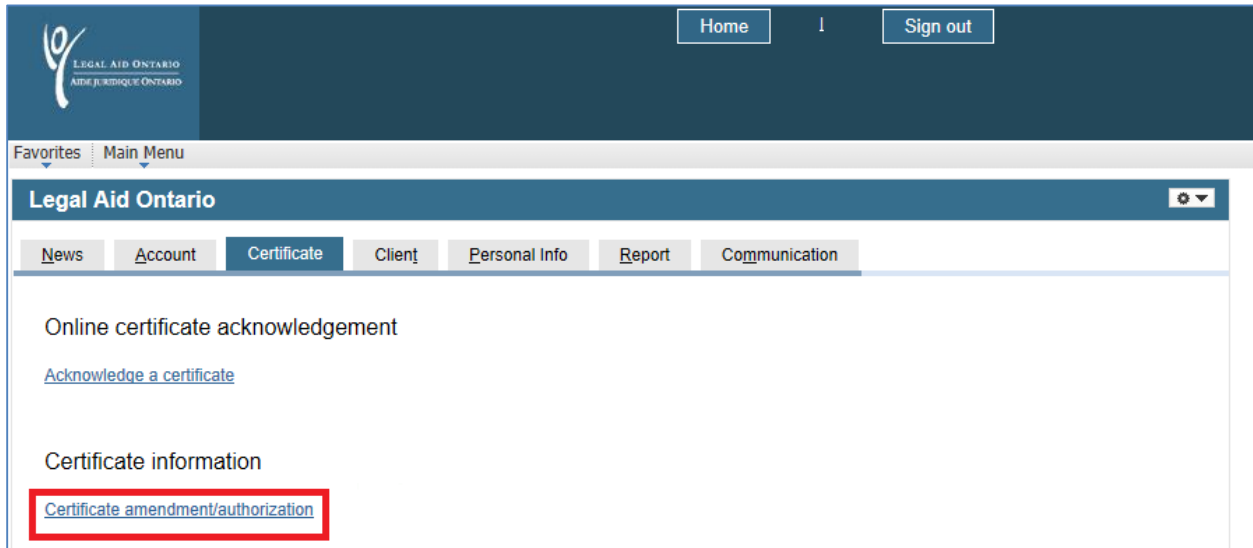2. On the new page click on the **"Certificate amendment/ authorization"** link

Figure 2.Certificate amendment/authorization link

3.On the **Certifcate look-up Page** , select the certificate number to which you want to attach documents to.
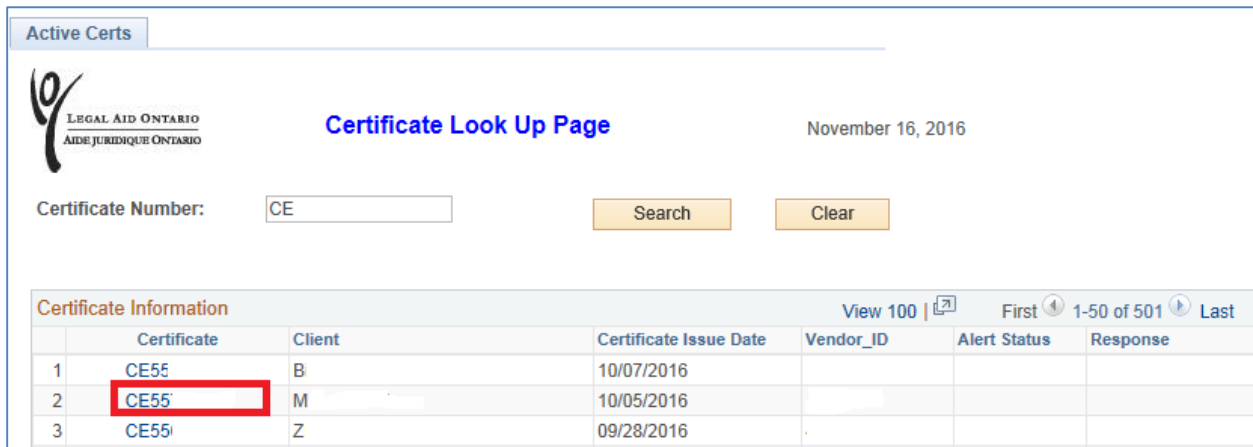

Figure 3. Certificate Look-Up Page

4. On the **Certificate information page**. Click on the new **Documents Attachments** link to take you to the certificate document attachment page.

Figure 4. Document Attachments link

5. Once on the **Certificate Documents attachment page** complete the 5 steps as follows:
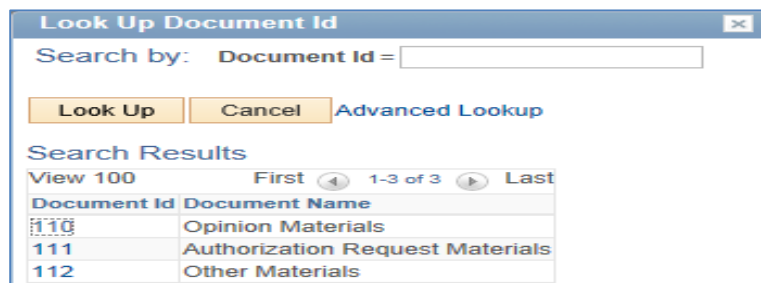

Figure 5. Document Attachement Page

Step 1. Fill in the Description field. Enter a short description of the document attached e.g. "opinion letter".

Step 2: Click on the **look up tool** to select the document type e.g. ID code 110- Opinion Materials

To attach multiple documents click on the **Add New button (**highlighted in **Figure 5)**

NOTE: You will get an error message if you try to submit a document prior to adding it

Figure 6. Document ID look-up

Important Note: For all ORB and CCB certificates Document ID 113: ORB/CCB Materials will be available for selection

Step 3: Attach the document: Click the **Browse** button and select the document you want to attach (see Figure 7)

Figure 7. Browse button

- **Removing a document attachment:** To remove a document attachment click on the delete tab in the same row as the Add new in **Figure 5**

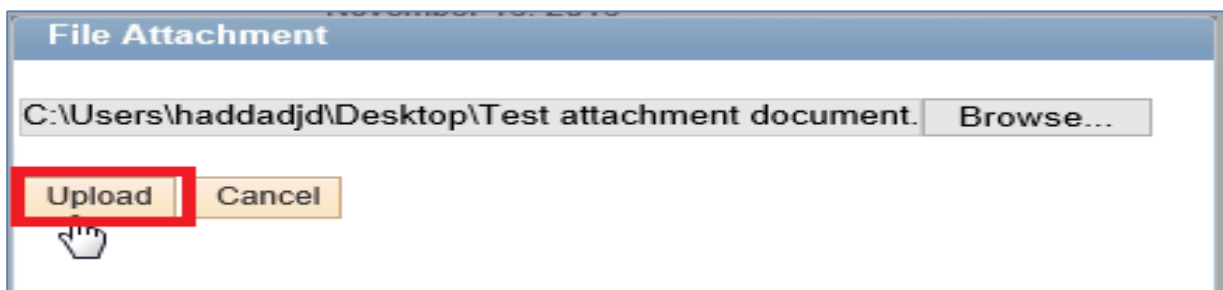- Once the document has been selected click **Upload(see Figure 8)**

Figure 8. Upload button

Step 4: Enter any additional **comments** (see Figure 9) This is **not** a mandatory field

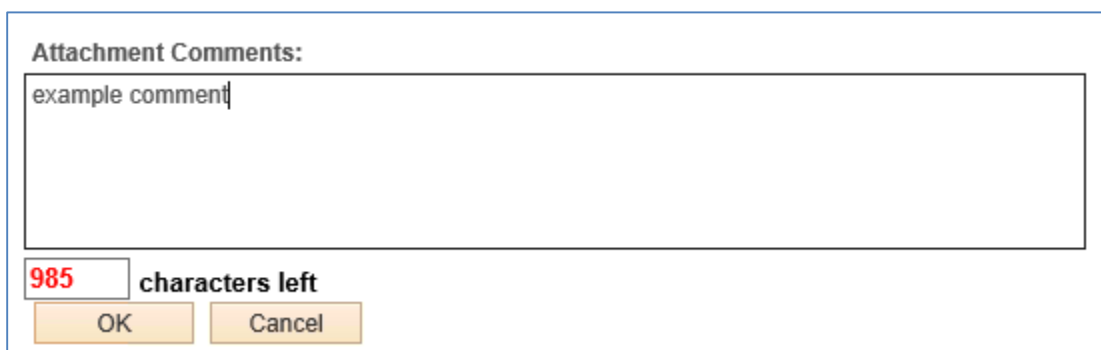1000 characters are available for any additional comments-

Figure 9. Comments field

Step 5. Click on the "**Submit Tab**"

Once you have selected "Submit" you will receive the following pop-up message to tell you that you have successfully submitted your document(s). (See Figure 10)
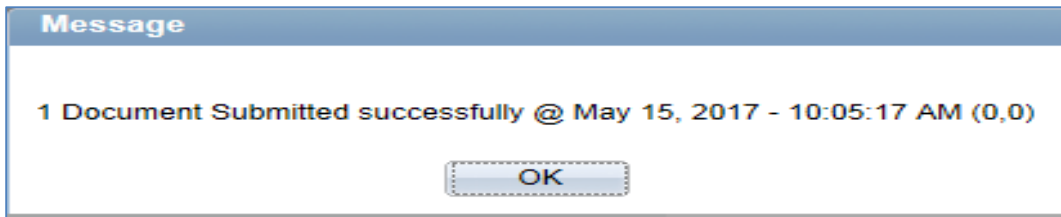

Figure 10. Successfully submitted message box

Once the document has been successfully submitted the "Historical Attachment" section will display all the relevant details. (See Figure 11) The Attachment and Comments remain available for viewing and/or printing

Figure 11. View historical attachments