

Chicago Bar Association Limited Scope Referral Panel Application and Instructions for Membership

This referral panel will connect litigants looking for fixed-cost, limited scope representation (otherwise known as unbundled, or a la carte, representation) with attorneys who are able to offer those services, specifically in the areas of landlord-tenant, domestic relations, and consumer/collections law.

To qualify for membership in the Limited Scope Referral Panel, an attorney must meet the following criteria:

1. Complete the attached application (and the “Application for Continued Participation” every year thereafter);
2. Demonstrate at least two years of experience (25% time or more) in one or more of the following areas of law: landlord-tenant, domestic relations, or consumer/collections.
3. Possess a license to practice law in Illinois and remain in good standing;
4. Offer a variety of unbundled limited scope services, when appropriate, at a fixed cost. These may include, but are not limited to, coaching, document review, document preparation, settlement negotiations, and limited scope court appearances.
5. Carry malpractice insurance and provide a copy of the Declarations Page showing the policy number, effective dates of coverage, amount of coverage, and named insured;
6. Agree in writing to comply with all Rules and Regulations of the Program, the Code of Professional Conduct of the Illinois Supreme Court, and the Rules of the Circuit Court of Cook County (see last page of application); and
7. Attend a CBA training seminar on limited scope representation or view a pre-recorded video of the same. A video recording of the *Unbundled Services to Expand Your Practice* seminar is available on the [CBA website](#). Please note, there may be a cost associated with viewing this video for non-CBA members. [Participants in the Justice Entrepreneurs Project can meet this requirement through their participation in the training program.]
8. **All members of the Limited Scope Referral Panel must provide identifying language when preparing documents to be filed with the court by a self-represented litigant. Please note that this is *not* a requirement under [Illinois Supreme Court Rule 137](#), but is an additional requirement for membership on this panel.¹ Sample identifying language is provided on page two of the instructions.**

¹ Rule 137 expressly provides that an attorney can provide document preparation assistance to a client without filing a general or limited scope appearance or providing any further representation when it is reasonable under the circumstances. Notwithstanding that it is not required under Rule 137, attorneys on the CBA limited scope panel should include the required language on any pleading where the attorney has provided assistance in preparing the document. The attorney is identified by their court attorney number rather than by name to assure the judge a licensed attorney has provided assistance. The judge cannot compel any action by the attorney, but the attorney number gives the judge a vehicle to make a complaint to the CBA if the judge believes the attorney’s assistance violated the Rules of Professional Conduct.

All applications should be submitted to Juli Vyverberg at the contact information below:

Mail: Juli Vyverberg
Lawyer Referral Service
Chicago Bar Association
321 S Plymouth Court
Chicago, IL 60604
Fax: (312) 554-2139
Email: jvyverberg@chicagobar.org

Applications will be reviewed by a Screening Committee within two weeks of receipt. Applicants should respond to any follow-up requests from the Committee in a timely fashion.

Once approved, attorneys will be added to a list of limited scope practitioners that will be disseminated by courthouse stakeholders including help desk attorneys, circuit clerks, law librarians, and judges. Interested litigants will contact the attorneys directly to inquire about services and pricing. Attorneys are expected to offer limited scope services in all circumstances where it would be appropriate under the applicable rules (see the CBA/CBF Limited Scope Toolkit for additional guidance in making this determination). Attorneys are also expected to respond in a timely and professional manner to all inquiries to maintain their status on the Referral Panel.

Identifying Language for Limited Scope Document Preparation

The following language must be included by any CBA Limited Scope Referral Panel member providing limited scope document preparation assistance on the last page of the document (underneath the signature of the self-represented litigant):

“This document was prepared with the limited scope assistance of [Cook County Attorney Code] pursuant to Supreme Court Rule 137. [Cook County Attorney Code] is not filing a general or limited scope appearance on behalf the self-represented person in this case and is not responsible for the actions of the self-represented person.”

Application for Admission to the CBA Limited Scope Referral Panel

Background Information

Name _____
(Last) (First) (Middle)

Business Address _____
(Number) (Street) (Unit) (City) (Zip)

Home Address _____
(Number) (Street) (Unit) (City) (Zip)

Office Phone _____ Fax _____ Home Phone _____

Email Address _____ Website _____

College Attended _____ Date of Degree _____

Law School Attended _____ Date of Degree _____

Languages Spoken (other than English) _____

I attest that I did one of the following:

- Attended the April 24, 2017 CBA seminar on *Unbundled Services to Expand Your Practice*
- Viewed a recording of the April 24, 2017 CBA seminar on *Unbundled Services to Expand Your Practice*
- Attended a limited scope representation training seminar as a participant with the Justice Entrepreneurs Project.

If you viewed a video recording of the seminar, please attach your MCLE certificate of completion with this application.

Legal Practice Information

Is your office accessible to individuals with disabilities? Yes No

Do you use a written retainer agreement with all clients? Yes No

Please check which of the following practice areas you are applying for:

Landlord-Tenant Consumer/Collections Domestic Relations

Number of years in which you spent over 25% of your time in the selected practice area: _____

Describe the nature and extent of your experience in the selected practice area:

Check all of the limited scope services that you offer:

Legal Advice Coaching Document Preparation Settlement Negotiations

Limited Scope Court Appearances Other _____

Describe your experience with limited scope representation and how you have incorporated it into your legal practice:

Employment Information

Please attach a current resume with your application or provide a link to your LinkedIn profile here: _____

In the alternative, list your legal employment history beginning with your current employer, using the form below. You may attach another page if necessary.

Current Employer

(Employer Name) (Address) (Telephone)

(Job Title) (Dates of Employment) (Nature of Firm's Practice)

(Nature of Your Practice/Duties)

Previous Employer #1

(Employer Name) (Address) (Telephone)

(Job Title) (Dates of Employment) (Nature of Firm's Practice)

(Nature of Your Practice/Duties)

Previous Employer #2

(Employer Name) (Address) (Telephone)

(Job Title) (Dates of Employment) (Nature of Firm's Practice)

(Nature of Your Practice/Duties)

Professional Liability

Do you have professional liability (malpractice) insurance? _____

Name of company, expiration date and number of policy, limits of coverage, and deductible:

Please attach the cover sheet and/or declarations page of your policy. **We cannot process your application without this information.**

Bar Membership

Date of Admission to the Illinois Bar _____
(Month) (Year)

Date of Admission to the Federal Trial Bar (if applicable) _____
(Month) (Year)

Illinois Attorney Registration Number _____

Cook County Attorney Code Number _____

CBA Membership Number (if applicable) _____

Disciplinary History

Has your right to practice law before any court, agency, or tribunal ever been denied, revoked, or suspended? Yes No

Have you ever been the subject of an inquiry or complaint with any attorney registration, regulatory, or disciplinary body such as the ARDC? Yes No

If you answered “yes” to either of the above questions, please provide more information below. You may attach another page if necessary.

References

Please list the names, addresses, telephone number, and email address of two (2) attorneys (who are not in your firm and do not share a work space with you) familiar with your legal experience and ability, particularly in the area of law for which you are applying to join.

Reference #1

(Name)	(Address)
(Phone)	(Email)

Reference #2

(Name)	(Address)
(Phone)	(Email)

The undersigned represents that the information herein contained is true and accurate and may be furnished to the public. I understand that this application is subject to approval by the Limited Scope Referral Panel Screening Committee (“Committee”) and that my participation in this program is a privilege and not a matter of right. I further understand that this privilege may be suspended or revoked at any time with or without cause. The decision of the Committee as to my acceptance and continuing participation in this Program is final, provided that I may withdraw from the program at any time. I hereby authorize the Illinois Supreme Court Attorney Registration and Disciplinary Commission to furnish the Committee with information concerning inquiries filed against me with its office and to advise the Committee if I am a member of the Bar of Illinois in good standing. I will not, in any event, hold the Chicago Bar Association, the Committee, or any officers or employees thereof or any member of its Board of Managers or any Committee liable in any way or manner whatever in connection with the program. I further agree to hold harmless the Chicago Bar Association, the Committee, and any officers, employees and members of its Board of Managers or any Committee from any liability arising out of my representation of clients pursuant to this program. I further agree to abide by any current Rules and Regulations of the Program, the Code of Professional Conduct of the Illinois Supreme Court, and the Rules of the Circuit Court of Cook County.

Applicant's Signature	Date
-----------------------	------