

# How to use your LegalShield Membership in Canada



Utilizing your online account page and mobile app tools will make your experience with your provider lawyer **easier and more efficient.**

## The Benefits of Using the App:

- No hold times! Skip the operator and submit your request directly in the app.
- Questions are listed within the app according to your specific request.
- You can update/edit your billing and contact information.
- You will get a call back from the firm within 8 business hours or on a specific date requested by you.
- The law firm can message you or request additional information in your account's inbox.

## Different Ways to Request a Consult:

- Go to <https://accounts.legalshield.com>, log in and select the LegalShield Logo and click on "Request a consult."
- Open your LegalShield Mobile app and sign in with your user ID and Password and select "Request a consult."
- Make a phone call.
- Call the provider firm in your province directly via their toll-free phone number. You will be able to locate your provider law firm's tollfree number in your mobile app or on the account's website.

## If you call the firm directly, we have a few tips to help you through the process:

- Be prepared to tell the CSR (Customer Service Representative) any names, dates, important documents, or other parties that may be involved in the legal matter.
- If there is a preferred contact time for the lawyer to call you back, please notify the CSR and they will make every effort to accommodate your request.

## Tips for when a lawyer assigned by your provider law firm will call you back to discuss your legal matter:

- Lawyers in each province are licensed in that area and are prepared to meet our Service Level Agreements to make sure you receive all your benefits listed under the Member Bill of Rights.
- The phone number from the lawyer may appear as "unknown" or "private". Please watch for the lawyer to call you to expedite the legal services.

**For Your Information: Each lawyer that may be assigned has been vetted.**

# How to Prepare Before Requesting a Consult

The first call with a lawyer can sometimes be intimidating and stressful, but we have some practical information that will help you save time and relieve a little of the stress from not knowing what to expect.

**To start!** Don't forget that you can use <https://accounts.legalshield.com> or the mobile app to enter an intake at your provider lawyer firm. This may save you from having to wait on hold before speaking to a customer service representative.

## 1. Gather as much evidence and detail as possible

As far back as possible, take a note of any events or details related to your legal problem. Include as much information as possible along with a timeline of events. This will help you better explain your problem when they call.

## 2. Gather documents that will help the lawyer understand your problem or question. This will save you from having to look for them during the call.

Examples include statements, passport, licenses, cards, letters, tickets, ID papers, receipts, emails, notices, etc. The lawyer may request for you to send your documents and will provide you with the proper process to submit those for review.

## 3. Have your LegalShield Membership number on hand.

In addition to your name and contact information, you may be asked for your LegalShield Membership number to confirm your subscription.

## 4. Make sure to call in advance.

Try to call early in the process, not the day before a deadline. Provider Law Firms need time to find the appropriate lawyer, study your case and prepare for any court dates.

## 5. Remain calm and be concise.

Express yourself calmly, use short sentences and explain the facts in order. It is sometimes difficult to keep your cool in these situations, but if you are upset, it will be difficult for the lawyer to understand your problem or question.

## 6. Ask questions.

By the end of the consultation, you should have understood what the lawyer can and cannot do in your case and what the next step will be. Do not hesitate to ask questions.

## Remember...

The lawyer may not have all the answers to your questions on the first call. It is very likely that your lawyer will need time to analyze your claim based on your contract with LegalShield before giving you a final answer on your case. Rest assured, our provider lawyers are here to help and advise you on any legal problem.

Following your consultation with a lawyer, you may receive a short satisfaction survey of three questions that will take less than a minute to complete. Your answers will allow us to pursue our continuous improvement process.

