

Intellinx User Guide for Attorneys

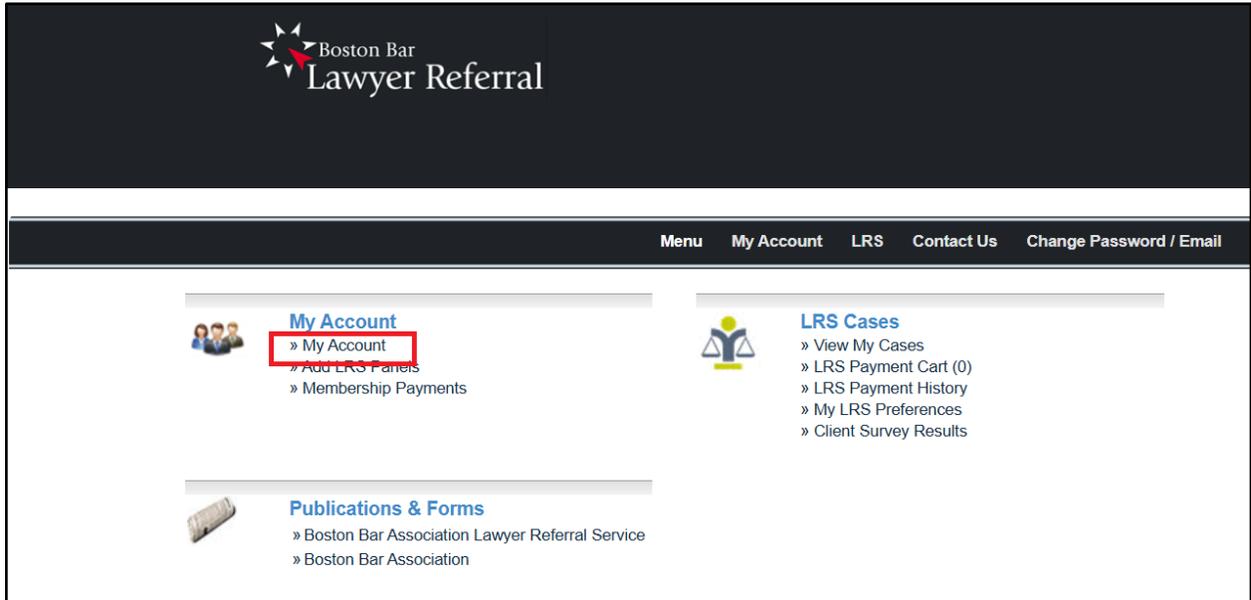
Revised 6/24/25

Questions? Contact 617-778-2040 or lrs@bostonbar.org.

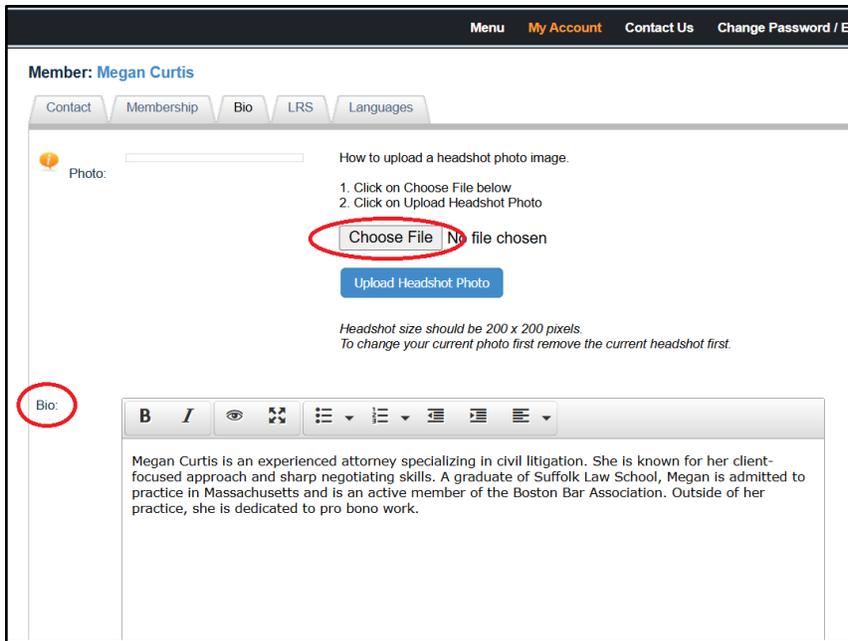
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Editing your profile

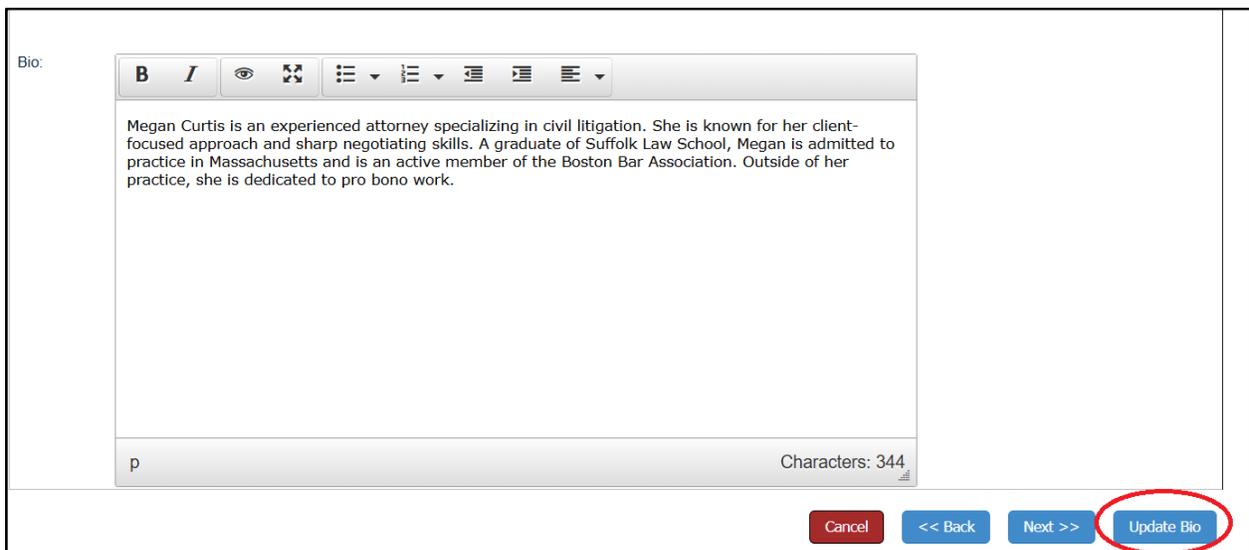
After logging in, click on “My Account,” then click on the “Bio” tab.



To include a photo in your bio, click “Choose File” and upload your preferred head shot.



Be sure to click the blue button “Update bio” to save your changes.



Updating your availability, panels and the geographic areas you serve

If you need to temporarily pause referrals, you can update your availability in the system. To update your panels and/or the geographic areas you serve, please contact lrs@bostonbar.org.

Click on the “LRS” tab, then scroll down to the section you need to update.

Member: Megan Curtis

Menu My Account Contact Us Change Password / Email

Contact Membership Bio **LRS** Languages

The Lawyer Referral Service (LRS) is a public service of the Boston Bar Association (BBA). Prospective clients are directed to the online LRS platform, which allows the public to receive a referral to an attorney for their legal issue — 24 hours a day, seven days a week — through the BBA's LRS website, www.bostonbarlawyer.org. All members of the BBA LRS must be BBA members in good standing with the Bar of the Commonwealth of Massachusetts and geographically located in the service area. An LRS attorney shall charge a maximum fee of \$25 for the first half-hour of consultation.

1. Regular Fee Referrals: Attorneys are obligated to remit 15% of all legal fees as payment is collected.
2. Reduced Fee Referrals: Attorneys may accept reduced fee cases at an hourly rate of no more than \$85. In those cases, no remittance fees are due to the BBA LRS.

[Expand/Collapse All](#)

E&O Insurance Details - (Insurance must be updated by LRS Staff)

✓ LRS Availability

Block LRS Availability: Yes No

From*: 06/18/2025 To*: 06/26/2025

Reason: vacation

Cancel Save

Reporting on the status of your referred cases

Click on “View My Cases”

Menu My Account LRS Contact Us Chan

My Account

- » My Account
- » Add LRS Panels
- » Membership Payments

LRS Cases

- » **View My Cases**
- » LRS Payment Cart (0)
- » LRS Payment History
- » My LRS Preferences
- » Client Survey Results

To update individual cases, click on “Action,” then “Update Status.”

All My Cases: 2

Active Case Active Case - need update Closed Case [Batch Case Status Update](#)

Client	Case #	Date Referred	Status	Updated On	Fees You Collected From Client To Date	Fees You Paid To LRS To Date	Payment Due
<input type="checkbox"/> S Smith, Test	1585	05/15/2025			\$0.00	\$0.00	\$0.00
<input type="checkbox"/> T TestLast, Testfirst	1575	05/15/2025		03/06/2025	\$5,000.00	\$0.00	\$750.00

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Action

- Update Status
- Make Payment
- Pay Referral Fee

To update multiple cases with that same status (ie: closed without consultation

or "engaged," click the box to the left of all relevant cases, then click "Batch Case Status Update."

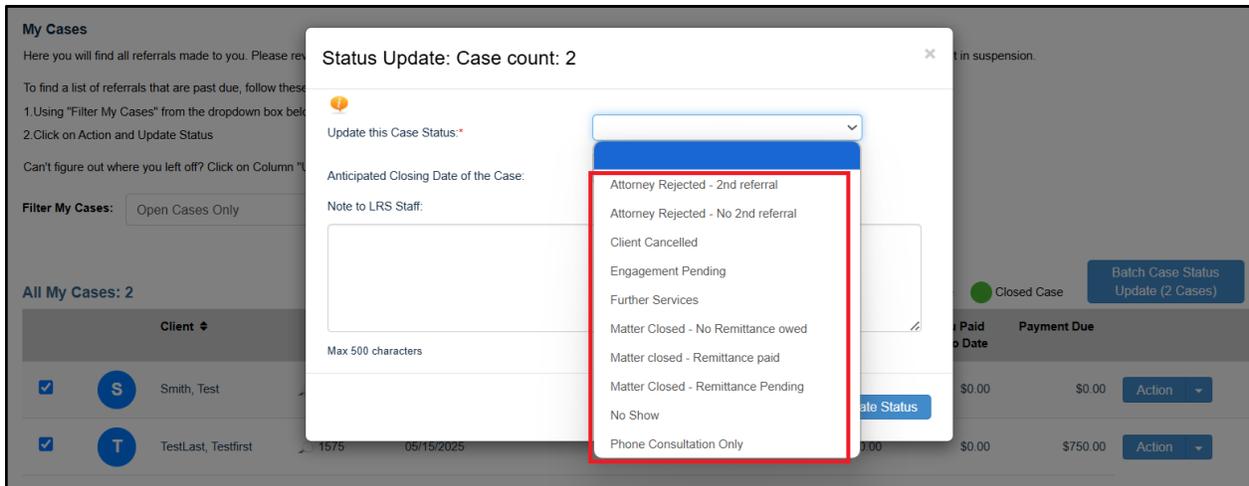
The screenshot shows a web interface for managing cases. At the top, there is a filter section with a dropdown menu set to 'Open Cases Only' and a search box labeled 'Client name or Case #'. Below this, a status legend indicates: a blue dot for 'Active Case', a yellow dot for 'Active Case - need update', and a green dot for 'Closed Case'. A blue button labeled 'Batch Case Status Update (2 Cases)' is circled in red. The main area contains a table with two cases. The first case, 'Smith, Test' (Case # 1585), has a blue checkmark in a box circled in red. The second case, 'Test.Last, Testfirst' (Case # 1575), also has a blue checkmark in a box circled in red. The table columns include Client, Case #, Date Referred, Status, Updated On, Fees You Collected From Client To Date, Fees You Paid To LRS To Date, and Payment Due. Each row has an 'Action' dropdown menu.

Client	Case #	Date Referred	Status	Updated On	Fees You Collected From Client To Date	Fees You Paid To LRS To Date	Payment Due
Smith, Test	1585	05/15/2025			\$0.00	\$0.00	\$0.00
Test.Last, Testfirst	1575	05/15/2025		03/06/2025	\$5,000.00	\$0.00	\$750.00

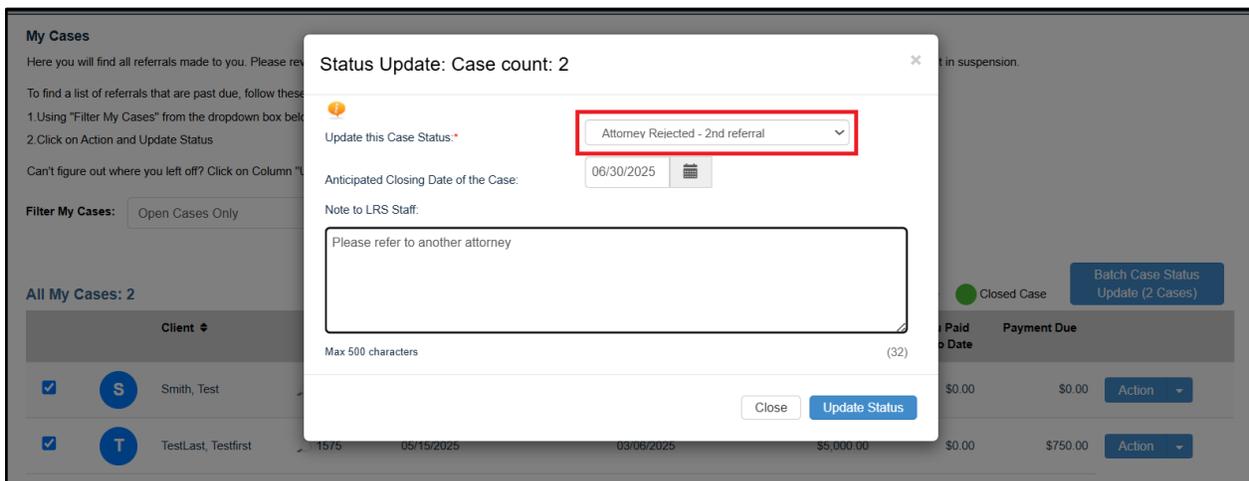
Whether updating one or multiple cases, choose the relevant case status.

Case status meanings:

- Attorney Rejected – 2nd referral: This client should be referred to another attorney. Please provide a note to LRS staff with the reason why.
- Attorney Rejected – No 2nd referral: Attorney will not take this case and client does not want another referral or attorney does not believe the case is appropriate for another referral.
- Client cancelled: Attorney attempted to set up a meeting, client cancelled.
- Engagement pending: Initial meeting occurred and client is considering whether to hire the attorney or not.
- Further Services: Client engaged attorney. Case remains open.
- Matter Closed – No Remittance Owed: Attorney did not work with the client, so no remittance is owed. Or this was a modest means case, so no remittance is owed.
- Matter closed – Remittance Paid: Attorney is done working with client and has paid their remittance to the BBA.
- Matter Closed – Remittance Pending: Attorney is done working with client, but has not yet paid the remittance.
- No Show - Attorney set up a meeting, client did not show up.
- Phone Consultation Only - Client and attorney had phone consultation, and client did not engage attorney.



If relevant, fill in “Anticipated Closing Date of the Case” and include any notes to LRS staff. Please be sure to include a note if you are requesting the case be referred to another attorney.



Examples of helpful notes to staff:

- This client has a court date of June 17, which I cannot make.
- This client selected family law but needs a trust & estates attorney.

If a client engages your services, please choose “Further Services” and update the amount collected from the client. The remittance owed to the BBA will be calculated based on the entered amount.

Status Update: Case # 1585; Test Smith

Update this Case Status*: Further Services

Attorney/Client Fee Agreement Type: Hourly

Lawsuit Filed? (If Yes enter Suit Number): Yes No

Anticipated Closing Date of the Case: MM/DD/YYYY

Previously Reported Client Fees Collected: \$0.00

Collected from this Referred Client to Date: \$ 1500

Note to LRS Staff:

Max 500 characters

Close Update Status

Making remittance payments

Whenever possible, please make remittance payments online through the system, rather than mailing a check.

Click the blue “Action” button and choose “Make Payment” then click “Add to Cart.”

All My Cases: 2

Active Case Active Case - need update Closed Case Batch Case Status Update

Client	Case #	Date Referred	Status	Updated On	Fees You Collected From Client To Date	Fees You Paid To LRS To Date	Payment Due
<input type="checkbox"/> S Smith, Test	1585	05/15/2025	Attorney Rejected - 2nd referral	05/19/2025	\$0.00	\$0.00	\$0.00
<input type="checkbox"/> T TestLast, Testfirst	1575	05/15/2025	Attorney Rejected - 2nd referral	05/19/2025	\$5,000.00	\$0.00	\$750.00

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Payment: Case # 1575; Testfirst TestLast

Enter the amount you are paying now and click Add To Cart button.

Fees You Collected From Client To Date:	\$ 5000.00
Fees You Paid To LRS To Date:	\$ 0.00
Balance Due:	\$ 750.00

Paying Now:(?)*

Payment Type:* Case Settlement Fee

Close **Add To Cart**

Continue adding cases to the cart as needed, then click “Checkout Now.”

Payment: Case # 1575; Testfirst TestLast

 Payment is successfully added to cart.

Checkout Now **Continue Adding Payments for Other Cases**

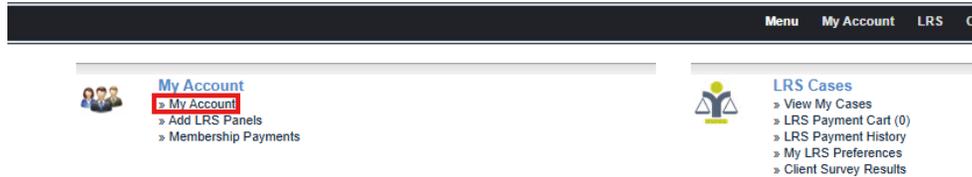
Whenever possible, please make remittance payments online by credit card, rather than mailing a check. If you need to mail a check, please make it out to Boston Bar Association and send it to:

Boston Bar Association
Dept 550
P.O. Box 4110
Woburn, MA 01888-4110

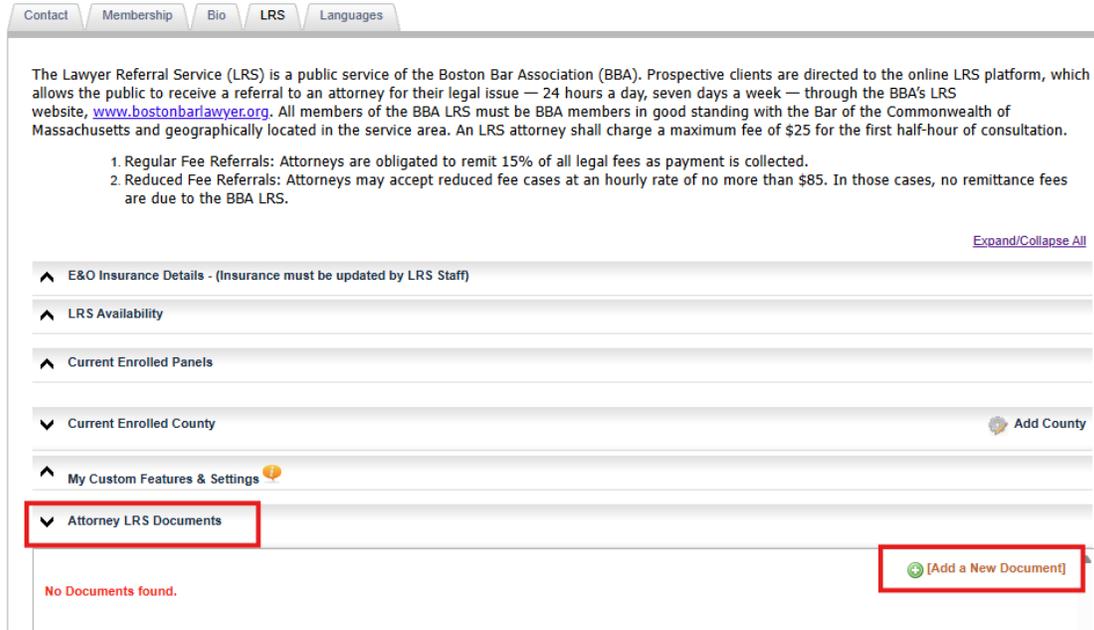
Be sure to note the Matter ID and client name in the Memo section.

Uploading E&O Insurance Certificate

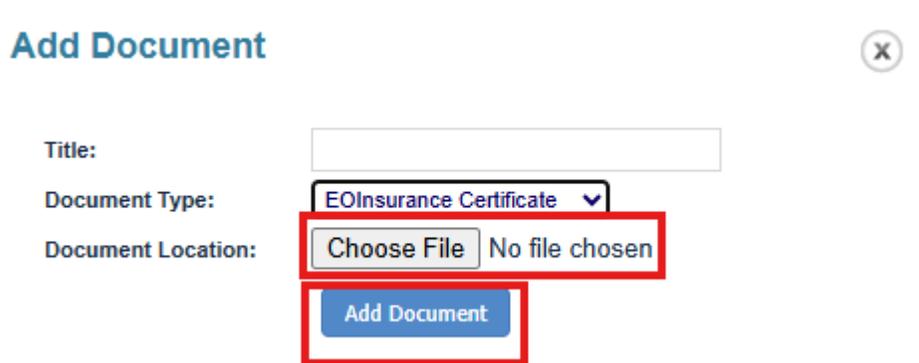
To upload a new E&O Insurance Certificate, navigate to my account.



From there, select LRS tab, and scroll down to Attorney LRS Documents, select add document



A pop up will appear, add title, document type, choose file, and add document



Temporarily Pausing your LRS Availability

Sometimes you will need be “paused” in our LRS system, examples include when on vacation or overloaded with cases.

My Account>> LRS >> Panelist Availability>>Block LRS Availability>> Insert to and From dates>> Reason

The screenshot shows a web application interface with a navigation menu at the top containing 'Contact', 'Membership', 'Bio', 'LRS', and 'Languages'. The 'LRS' tab is highlighted with a red box. Below the menu is a text block explaining the Lawyer Referral Service (LRS) and its fees. A list of two items follows: '1. Regular Fee Referrals: Attorneys are obligated to remit 15% of all legal fees as payment is collected.' and '2. Reduced Fee Referrals: Attorneys may accept reduced fee cases at an hourly rate of no more than \$85. In those cases, no remittance fees are due to the BBA LRS.' A link 'Expand/Collapse All' is visible to the right. Below this is a section for 'E&O Insurance Details - (Insurance must be updated by LRS Staff)' with an expand/collapse arrow. Underneath is the 'LRS Availability' section, also with an expand/collapse arrow and highlighted with a red box. This section contains a form titled 'Block LRS Availability:' with a calendar icon, a 'Yes' radio button (selected) and a 'No' radio button. Below are input fields for 'From*:', 'To*:', and 'Reason:'. At the bottom of the form are 'Cancel' and 'Save' buttons.