

Integrating Online Legal Forms in Phone-Based and Remote Legal Services

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The Basics

Online legal forms for professionals and self-help can extend the reach of legal assistance for older adults. Using phone-based and remote service methods, a program can direct callers to relevant forms, or complete the forms with them, over the phone or internet. These practices are particularly critical during COVID-19, as legal assistance providers continue to navigate remote legal services and look for efficient methods to handle an increase in service demand.

What Are Online Legal Forms and Do Older Adults Use Them?

Most online legal forms walk the user through an online guided interview and generate a personalized legal document based on the answers provided. The user may have the option to submit the form directly to a court or legal aid organization, or print the form to submit by mail.

[Law Help Interactive \(LHI\)](#) is a leader in the development of free online legal forms for self-help and professionals. LHI is national document assembly platform that allows individuals and their advocates to prepare legal documents and pleadings online for free. LHI is used by civil legal aid programs, courts, and community agencies in 47 states, and in 2019, more than 660,000 free forms were assembled using LHI in 2019.

LHI reports that approximately 33% of users of their online forms are 55 years or older. However, there are still many older adults who do not have access to internet, and this digital divide disproportionately affects low income older adults and older adults of color.¹ Some of the strategies offered in this Tip Sheet help bridge this divide by utilizing an advocate as an intermediary who works on the form over the phone or prints and mails a paper version of the form to the caller.

Locating Online Forms

Law Help Interactive State-Based Forms

[Law Help Interactive's website](#) has a "Find Forms" feature where you can search for available forms in your state and sort by forms for professionals and forms for self-help. Both types of forms, however, can be used by attorneys to integrate into remote services workflow, phone services, or virtual clinics. The state-based forms on advance planning, probate, housing, and family law are particularly useful for older adults.

¹ Pew Research, [African Americans and Technology Use](#) (2014) and [Tech Adoption Climbs Among Older Adults](#) (2017).

Aging Safely National Forms

In addition to the state-based forms, Law Help Interactive has created a new set of national forms that are specific to elder justice issues through a project called Aging Safely. The forms were designed to address elder abuse and financial exploitation matters. These forms include an interstate coversheet for protective orders, a safety planning form, and a set of three consumer-focused forms. These forms and the accompanying Toolkit can be located on the [Aging Safely website](#).

Additional Ways to Locate Forms

Local courts may also have their own online self-help forms, available on the court websites or through court help centers. The Self-Represented Litigation Network has [resources available](#) to locate court help centers by state.

Additionally, many states have state-based [Law Help](#) websites, which often house state-based LHI forms and other template forms. These websites usually have additional self-help information and instructions for using and submitting the forms.

Integrating Online Forms in Remote and Phone-Based Services

There are a number of ways to integrate online forms into your services and workflow. Here are some examples:

Phone-Based Services

Legal helplines and programs delivering services by phone may be working with clients who do not use email or online tools. For those callers, helpline providers can walk the caller through the form interview by phone and then mail the final document to the caller with instructions for next steps to submit the form. For callers who do have access to the internet, or have a trusted intermediary with access, the helpline providers can send the link to the appropriate online form and offer to review the completed form.

Virtual Legal Clinics

Legal assistance programs that are hosting remote legal clinics can give pro bono attorneys and other attorney volunteers links to the forms that might be helpful while working with clients in the virtual clinic. Utilizing real-time messaging and/or video-chat, the attorneys can help the clinic clients complete the forms, offering an efficient way to help individuals create helpful legal documents.

Remote Outreach Presentations

Organizations that are doing remote outreach presentations through virtual platforms like Zoom, Facebook Live, or YouTube can share the links to relevant online forms through chat or in the description and even offer tips for filling them out. Attendees can then fill out the forms on their own or with a trusted intermediary after the event.

Internal Workflow

Legal assistance programs can build the forms into their internal processes and work to streamline creation of documents. Both self-help and professional forms can be utilized. Links to the forms could be in case management systems, internal guides, existing templates, and other access points that advocates utilize while working on cases. Integrating forms in this way can assist with streamlining services at a time when legal assistance is needed by a growing number of people.

Develop Your Own Forms

If you are unable to locate forms that would be useful for your state and the issues your clients face, consider [reaching out to Law Help Interactive](#) to see if there are any forms in progress for your state or find out about opportunities to work on developing a specific form for your state.

Additional Resources

- [Aging Safely Online Forms Toolkit](#)
- [Remote Legal Support Guide: A Best Practices Manual for Nonprofit and Pro Bono Innovation](#)
- [Legal Services National Technology Assistance Project](#)
- [Law Help Interactive](#)
- [Self-Represented Litigation Network: COVID-19 Resources](#)
- [LHI Online Forms Resource Center](#)
- [NCLER: Strategies for Providing Remote Legal Services to Older Adults](#)
- [NCLER: Creating Effective Legal Outreach Programs](#)

Case consultation assistance is available for attorneys and professionals seeking more information to help older adults. Contact NCLER at ConsultNCLER@acl.hhs.gov.

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