

Legal Helpline Technology: Automated Workflow

LEGAL HELPLINES TIP SHEET • July 2019

Kirsten Jacobson and Tim Hughes, Tennessee Alliance for Legal Services

NATIONAL
CENTER ON
**LAW &
ELDER
RIGHTS**

About TALS and HELP4TN

Tennessee Alliance for Legal Services (“TALS”) is the statewide support organization for legal aid in Tennessee. TALS’ mission is to strengthen the delivery of civil legal help in Tennessee. We do this by simplifying the search for civil legal help, being a leading and unifying voice; and establishing a center for innovation, training, and expertise.

TALS leverages a team of 8 part-time attorneys on a statewide civil legal helpline, 1-844-HELP4TN. The helpline has served over 20,000 Tennesseans to date and is on track to serve 6,000 Tennesseans this year. The helpline serves all 95 counties in Tennessee and has a designated line for senior (aged 60+) callers.

Introduction

New technology provides an opportunity for legal helplines to reach more clients and maximize resources. Technological advances for legal helplines include case management system integration, improved call sorting and routing, direct referrals, and more. This Tip Sheet and accompanying webcast focus on automated workflow.

Helpline and hotline procedures and protocols differ from program to program. When considering the adoption of new technology, programs should evaluate their needs and determine the best fit. This Tip Sheet offers one example and case study of the application of automated workflow.

Why Does Defining a Workflow Matter?

For helpline case management and scalability, defining a workflow can save time and resources. A defined workflow allows new helplines to scale resources and can help an established helpline grow efficiently. Since defining and automating the HELP4TN legal helpline workflow, HELP4TN has seen several changes:

- The team has saved 2 days per month of staff attorney time in reporting;
- The team has grown from 3 attorneys to 8 attorneys, with 4 attorneys working remotely;
- Call volume has increased; and
- Automating customer satisfaction surveys has removed all staff attorney time spent on administering surveys and increased the number of surveys sent and received.

Tech Specs: Kim Technologies

The HELP4TN legal helpline selected a Kim Technologies platform to implement automated workflow.¹ The Kim Technologies platform allows for no-code document and workflow automation. Using Microsoft Word capabilities, a team member is able to create a document and build a workflow for multi-level review

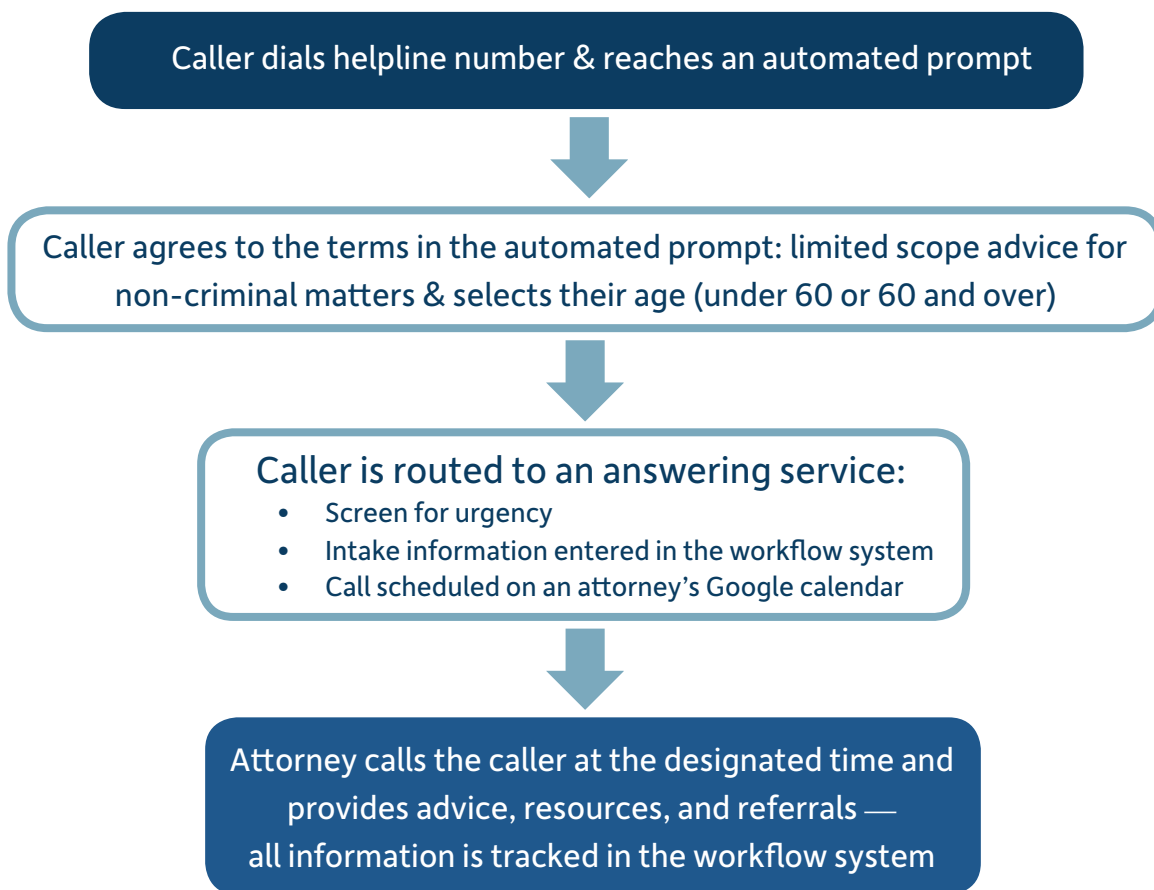
¹ This Tip Sheet provides an individual case study of a program’s use of technology and choice of technology platform. The inclusion of information about specific technology is not an endorsement or recommendation of these companies from NCLER.

within the system. Within each document and workflow, the team member can specify data points for collection and search, build real-time dashboards, and create system users and groups—all with no code.

How Our System Works

1. A caller reaches an automated prompt after dialing 1-844 HELP4TN.
2. The caller agrees to the terms in the automated prompt: limited scope advice for non-criminal matters.
3. The caller selects their age: under 60 or 60 and over.
4. The caller is routed to the answering service, where they can schedule an appointment with a helpline lawyer.
5. The answering service enters intake information into the Kim workflow system and schedules the call on the attorney's Google Calendar.
6. The attorney provides advice, resources, and referrals, and tracks all information in the workflow system.

Workflow Visual Guide



This chart is a sample workflow guide only, and it is intended to be customized by individual programs to include their specific office procedures, local resources, and information before use.

Resources and Additional Information

- [Tennessee Alliance for Legal Services](#)
- [HELP4TN, a program of Tennessee Alliance for Legal Services](#)
- [Kim Technologies](#)
- [Intelligent Office](#)
- [Call Center Technology: A Toolkit for Legal Aid Organizations](#)

Contact Information

- Tim Hughes, HELP4TN Program Manager, thughes@tals.org
- Kirsten Jacobson, Staff Attorney, kjacobson@tals.org

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

This Tip Sheet was supported by contract with the National Center on Law and Elder Rights, contract number HHSP233201650076A, from the U.S. Administration on Community Living, Department of Health and Human Services, Washington, D.C. 20201.