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

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Housekeeping

- All on mute. Use Questions function for substantive questions and for technical concerns.
- Problems getting on the webinar? Send an e-mail to NCLER@acl.hhs.gov.
- Written materials and a recording will be available at NCLER.acl.gov. See also the chat box for this web address.
About NCLER

The National Center on Law and Elder Rights (NCLER) provides the legal services and aging and disability communities with the tools and resources they need to serve older adults with the greatest economic and social needs. A centralized, one-stop shop for legal assistance, NCLER provides Legal Training, Case Consultations, and Technical Assistance on Legal Systems Development. Justice in Aging administers the NCLER through a contract with the Administration for Community Living’s Administration on Aging.
About Pro Bono Net & Law Help Interactive

Pro Bono Net is a national nonprofit that works to bring the power of the law to all by building cutting-edge digital tools and strengthening collaboration in the civil justice sector to tackle justice problems.

Law Help Interactive (LHI) is a program of Pro Bono Net. Through LHI, nonprofit legal aid programs, elder justice groups, courts, and community partners can create and host free legal forms that individuals can readily use to help themselves.
Key Lessons

• New elder justice online forms are available from Law Help Interactive
• These and other online forms can be integrated into phone-based and remote legal services
• Promising practices and partnerships utilize online legal forms to provide enhanced services to older adults
Poll 1

Are you using Law Help Interactive or other online forms?

A. Yes
B. No
C. Unsure
What is Law Help Interactive?
Law Help Interactive: Vision

• We envision a world where online legal forms are easy to find and easy to use. We believe those without lawyers have a right to present their issues clearly and completely.

• We’re bringing a vision of equal access about through LawHelp Interactive by presenting accurate, easy to use forms with complete instructions, that people in crisis can readily use to help themselves.

• Visit LawHelpInteractive.org
Law Help Interactive

• LawHelp Interactive (LHI) is a national document assembly platform that allows low-income and vulnerable individuals and their advocates to prepare legal documents and pleadings online for free. We are also:
  • A training center: we teach advocates how to create the interactive interviews used to generate documents on LHI
  • A best practices engine: we facilitate the sharing of best practices among nonprofit organizations developing online forms initiatives
  • An innovation hub: We are nonprofit experts on using technology to expand legal services and support for underserved communities
How Does LHI Work?

A person answers questions through an online, guided interview.

A personalized legal document is created from the answers.

The answers can be saved online and reused.
Where is LHI Being Used?

• LHI is used by civil legal aid programs, courts, and community agencies in 47 states

• More than 660,000 free forms were assembled using LHI in 2019

• Forms can be designed for self-help, assisted self-help, advocate or pro bono attorney use

• Over 30,000 free interviews served each week across the US—in family law, probate, wills, housing, consumer, poverty law areas
What Forms Are Part of the Aging Safely Project and How Were They Selected?
Aging Safely Free Forms

- Cover sheet for interstate enforcement of a protection order
- Safety planning tool for older adults
- ID theft and financial abuse prevention forms—composed of multiple forms that work together as standalone forms and as a package:
  - Debt forgiveness letter
  - Dispute a charge from a bank or company
  - Dispute a credit report
Cover Sheet

• Cover sheet for interstate enforcement of a protection order

• If the older adult moves, the order can be recognized as valid (full faith and credit) by police and other local agencies (e.g.: relocation due to fire or COVID-19)

• This is based on the Project Passport form from the National Center for State Courts, which aims to improve recognition of orders of protection across states/tribes through a cover sheet with common data elements
Cover Sheet for Protection Order

Version: 03/30/19 (Prototype for review and comment)

Welcome! This free program can create a cover sheet for your protection order. When you put the cover sheet on top of your protection order, it makes it easier for the courts and police in other states to enforce your order.

Who can use this program?
You can use this program if:
- You have a valid protection order,
- You are a legal services provider or a pro bono lawyer, or
- You are an advocate for a client with a valid protection order.

This program is free. No one may charge anyone to use it. You must agree to these terms of use if you want to use this program.

Who should make a cover sheet?
It's a good idea to make a cover sheet if you:
- Have a protection order now, and
- Plan on traveling or moving to another state.

Do I have to file the cover sheet in the other state's court?
No. Just put it on top of your protection order. The cover sheet shows law enforcement that your protection order is valid in the new state.

Click "Next" to continue.
How to Use Your Protection Order in Another State

We printed 2 sheets for your case:
• These instructions, and
• Your Cover Sheet

Your Next Steps

Look at Your Cover Sheet

If anything on the Cover Sheet is not correct, fix it now on the computer.
Then print a new Cover Sheet.

Note: If you want to save your answers to print your cover sheet again, you must create an account.

Put Your Cover Sheet on Your Order

Put the Cover Sheet on top of your Protection Order.
Keep the Cover Sheet on top of your Protection Order, especially when you travel to another state.

It’s a good idea to give a copy of your Order and Cover Sheet to someone you trust:
• In this state, before you leave the state, and
• In the state you are going to, if possible.

Contact the police if...

If the person your order protects you form disobeys the Protection Order, call 911 right away.
When the police come, show them your Cover Sheet and Protection Order.
Ask for a police report about the violation.

For more help:

For questions about your Protection Order, contact the:
• Court that made your Protection Order, and
• Police in your area

Other Resources

• Law enforcement confirms protection orders at this database: www.fbi.gov/services/cjs/ncic
• For more information about traveling with a protection order see: http://www.bjs.gov/publications/pubpdfs/ffp_advocate_guide.pdf
• Your local legal aid group, go here: https://www.lawhelp.org/find-help

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Protection Order Cover Sheet

This Cover Sheet Aids in Enforcing your Protection Order in Other States

Restraining Order

Case No. 111
Court: Court of Common Pleas of the 43rd Judicial District
County, State: Monroe County, Pennsylvania

Petitioner/Plaintiff (Name)
Maria Doe
First Middle Last

Petitioner/Plaintiff (Date of Birth)
October 5, 1949

Other Protected People (Name/s & Date/s of Birth)

Respondent (Name)
John Doe
First Middle Last

Respondent (Date of Birth and Identifiers)
October 1, 1950 or [ ] unknown
Gender: Male Height: 5 feet, 11 inches Weight: 165

This Order was issued by the court listed above on October 23, 2019. It expires on February 20, 2020.
This order is valid and meets all qualifications for interstate enforcement, including:
It was made in response to a petition or motion filed by or for someone asking for protection.
It was personally served on the Respondent on 10/01/19.
There will be a hearing on December 26, 2019. The Respondent was notified of that hearing.
The Respondent is an intimate partner of Petitioner.
This Order lists the terms the Respondent must obey.
This Order tells the Respondent that the protection order is valid in all 50 states, Indian tribal lands, the District of Columbia, and any U.S. commonwealth, territory or possession.

Protection Order Cover Sheet

Page 1 of 1
Safety Planning Tool

• Helps older adults prepare a free, customized safety plan
  • Questions about the individual’s living situation, family & friends who are safe & can help, important documents and phone numbers
  • Uses answers to recommend safety steps and create a plan that can be saved or printed
  • Users are encouraged to review every 3 months to keep it up to date
Final Document

• Only what applies:
  • Children
  • Own vs rent
  • Transport
  • Support network
  • Encouraged to review

My Safety Plan

Plan made (date): February 24, 2020
Reviewed (date): ________________

This is my plan about how to be safer and how to be ready if there is more violence.

I cannot control someone else’s violent behavior. But I CAN choose how I respond. I can also decide the best way to get myself and my family to safety.

Step 1: Safety During Violence
I might not be able to avoid violence. To be safer, I can use different strategies. I will do some or all of the following:

Practice How to Get out Safely.
• I will plan which doors, windows, elevators, stairways, or other exits to use.
• I will think about my health and abilities and those of anyone
Package of Consumer Forms

• Three forms available:
  • Debt forgiveness letter
  • Dispute a charge from a bank or company
  • Dispute a credit report
Finding the Forms

- The forms are available for use by advocates and older adults on AgingSafely.us
- A toolkit is available on how to best use the forms, case studies, and other helpful information
Posting Forms on Your Website

• We encourage access to justice partners to link to these forms by linking to the AgingSafely.us page for each form, with the instructions to use it.

• We discourage direct links to the LHI forms because the users need to see the instructions before they start creating the forms. Those pages provide helpful resources for the users before they start creating their documents.

• All use of LHI forms is free and sharing the forms is encouraged. Advocates cannot charge for the use of the forms. Non-lawyers can use these forms to help people for free.
Are There Additional LHI Forms That Would Be Useful to You for Programs Serving Older Adults?
Forms By State

Find Forms

To find a form, click on your state on the map below or select your state from the dropdown menu. If LHI forms are available in your state, you will be taken to a trusted-partner site that can help you with the forms or provide other helpful information.

User Type

State / Region

Search

If your state does not have the form you need, try lawhelp.org. They may have the forms, or other resources that can help you.
Use of Online Forms By Age

• LHI creates forms for those 55+ in all areas of civil law, in addition to the forms created for the Aging Safely project

<table>
<thead>
<tr>
<th>Age</th>
<th>% of LHI users</th>
</tr>
</thead>
<tbody>
<tr>
<td>55-64</td>
<td>21%</td>
</tr>
<tr>
<td>65+</td>
<td>13%</td>
</tr>
<tr>
<td>Total 55+</td>
<td>33%</td>
</tr>
</tbody>
</table>
Older Adults & LHI: 2019 Data

• Approximately 12,000 small estate/probate documents created
• Approximately 30,000 conservatorships (all ages)
• 37% of LHI users are in rural areas vs. 19.3% national population
• 95% would use LHI again and 96% had their needs met
• 81% created the document successfully
Forms: Advance Planning

Self-Help Form: Advance Health Care Directive
Authored By: Legal Aid Society of Hawaii

Contents
- Information about using Self-Help Forms
- Click this Link to Get Started
- Technology Safety Information
- Frequently Asked Questions - FAQs
- Related Materials for Reference

Information about using Self-Help Forms

Welcome! This online interview was developed by the Legal Aid Society of Hawaii for use by low-income persons representing themselves, but is available free of charge to all persons. **These forms are not for commercial use and charging for use in any way is prohibited.**

Use this interactive interview to give instructions about your future medical care and to designate a person to make health care decisions for you if you become incapacitated. This interview will help you draft an Advance Health Care Directive. We suggest you read our publications including [Advance Health Care Directive](#) before completing this interview.
Forms: Estate Issues

Probate, Wills, & Estates

Probate Court Forms (statewide)
The MN Judicial Branch publishes some probate forms, but not every probate form. You could also get forms at a law library, from a legal forms publisher, or from an attorney. You should get advice from a lawyer to decide which forms to use in your case.

Probate Court Forms (2nd District) - approved for Ramsey County District Court
If your case is not filed in Ramsey County District Court and you want to use these forms, you MUST edit the forms for use in your county and judicial district. Check with your local Court Administration about the specific procedures for that district.

Probate Court Forms (4th District) - approved for Hennepin County District Court
If your case is not filed in Hennepin County District Court and you want to use these forms, you MUST edit the forms for use in your county and judicial district. Check with your local Court Administration about the specific procedures for that district.

Non-Court Forms:
The Minnesota Legal Services State Support publishes some non-court forms, including:
Health Care Directive Fact Sheet & Form
Power of Attorney Fact Sheet & Form

The MN Attorney General's Office also publishes some non-court forms, including:
Health Care Directive Form (.pdf)
Power of Attorney "Short Form" (.pdf)
Revocation of Power of Attorney Form (.pdf)

Wills and Trusts: Because estate planning is a complicated area of law and every person's situation is unique, it is best to get help from a lawyer with drafting a Will and/or Trust.
Forms: Housing Issues

Do-It-Yourself Answer to Eviction Complaint

Use this tool to prepare an Answer if you are facing eviction. You will go to the LawHelp Interactive website to do this interview. After you answer the questions, your finished form will be ready for you to print.

COVID-19 updates

- Are You Being Evicted? Select Your County to Get Legal and Financial Assistance
- How will the COVID-19 (Coronavirus) Pandemic Affect My Legal Problems?
- MI Safe Start: Reopening and Workforce Information
Forms: Family Issues

**Initial Notices**

This Interview will allow the creation of three different documents: an Authorization Agreement for Voluntary Caregiver, a Power of Attorney for family Reunification.

Generating an Authorization Agreement for Voluntary Caregiver will not always print out depending on certain screening factors.

Please note that there is a maximum of 10 children that can be listed for the Authorization Agreements. As the other documents are not limited, you will often exceed this limit.

To get around the limit, please return to the interview after assembling the documents and remove the children where an Authorization Agreement is not required.

Do you believe you will complete all the documents in one sitting? For ease of saving, the requirement to fill all the required fields is currently turned off to produce a final document until they are turned on and checked. Many of the screens ahead will have a button to turn off the fields so that you can save work in progress.

To turn on the required fields click below:

[Turn on Required Fields]
How Would You Recommend That Programs Use These Forms in This Time When Many Services Are Being Provided by Phone or Virtually?
How to Use The Forms

• One-on-one with a person who needs help
• In a virtual workshop if you identify someone who needs to use one of the forms
• Share the forms with your pro bono lawyers in case they need to help someone with one of the issues the forms cover
• Share them with your staff in case they identify someone with one of the legal needs the forms cover
• In a court based or legal aid-managed self-help center as part of the services you provide
Example: Phone-Based Services

• Legal helplines and programs delivering services by phone may be working with clients who do not use email or online tools

• Callers who do not use email or online tools:
  • As part of this phone-assistance, programs can provide consultations to clients and prepare these documents over the phone
  • Documents are mailed back to clients with a letter describing brief services provided, instructions for their signature, and submission of documents by mail

• Callers who use email or online tools:
  • Send the link to the form and verbally walk through filling out the form
Example: Remote Clinics

- Legal assistance programs that are hosting remote clinics can complete the forms with the attorneys in the virtual meeting
  - Through real-time messaging and video-chat
  - Utilize document uploads by client and attorney
  - Integrated with fillable interactive forms designed for advocates or self-help
Example: Remote Workshops

• Information about available forms can be shared in drop-in virtual workshops offered by phone and/or an online meeting platform
  • Links and how to submit the online forms is provided during the workshop
  • Clients fill out the forms on their own after the workshop
Example: Internal Use

• Legal assistance programs can build the forms into their internal processes and work to streamline creation of documents
  • Utilize forms for professionals or self-help
  • Options to build into office work flow

• Helpful tool in streamlining services at a time when legal assistance is needed by a growing number of people
Addressing the Digital Divide: Strategies for Advocates

• Ask clients from the start what their connectivity limitations are

• Know the resources available in your state and community
  • Lifeline
  • Library resources—lending hotspot devices?

• Utilize trusted intermediaries who may have more access

• Consider training support staff to assist with applications and researching options for connectivity
Additional Resources

• Aging Safely Online Forms Toolkit
• Legal Services National Technology Assistance Project
• Law Help Interactive
• Self-Represented Litigation Network: COVID-19 Resources
• LHI Online Forms Resource Center
Audience Questions
Visit Our Website: ncler.acl.gov

Search for resources
Read practice tips
Sign up for the email list
Request a case consultation
Learn about upcoming trainings

ncler.acl.gov
Case Consultations

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