

Q&A Session: Strategies for Providing Remote Legal Services to Older Adults

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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.

COVID-19 Resources

- ACL: [COVID-19 Page](#)
- Pro Bono Net: [Justice for Older Americans](#)
- NCLER:
 - April 15th: Strategies for Continuing Court Based Advocacy During the COVID-19 Pandemic
 - April 22nd: The Role of APS in Elder Abuse Cases, Leveraging Strengths Across Disciplines
 - Past trainings & resources: [NCLER Website](#)
- Justice in Aging: [COVID-19 Webinars](#)
- Case Consultations

Today's Session

- Responding to questions submitted during the March 25th webinar and via email
- Submit questions today:
 - Questions box on your control panel
 - We will try to address as many as we can, or will follow-up via email

Client Relationships & Outreach

How can I build rapport and make my clients feel comfortable when providing services remotely?

Our call volume has dropped during the COVID-19 pandemic. What are possible reasons for this and how can we address it?

Communication Examples



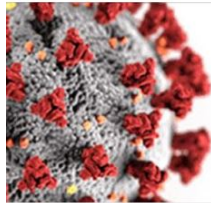
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ACTIVE & ABLE TO ASSIST!**

March 24, 2020 | 



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We have had inquiries from clients and partners as to whether Idaho Legal Aid Services is still taking cases. We are open for business via telephone and email, but closed to walk-ins and most of our staff working from home. We continue to represent clients in protection order, eviction, and other cases still being processed through the courts. We continue to staff our senior, housing and domestic violence advice lines and are considering expanding their scope. You can reach us at 208-746-7541.

What are some options to establish an attorney-client relationship or enter into a retainer agreement when working remotely?

Entering into an Agreement

Sample workflows:

- Legal aid staff reviews written limited scope agreement with client upon referral to remote service
- Client acknowledges they have read and understood services agreement prior to virtual consultation
- Client executes limited scope service agreement remotely (via SignNow or similar platform)
- Create plain language agreement and terms
- Sample Limited Service Agreement available in [Remote Legal Support Guide](#)

Communicating Scope of Services

- Helpline & hotline protocols may be helpful when thinking about communicating scope of services
- NCLER Resource: [Legal Ethics—Helplines & Hotlines](#)
- [ABA Standards for the Operation of a Telephone Hotline Providing Legal Advice And Information](#)

What are the methods of service delivery and document sharing for clients who do not have computers or smart phones?

Collaboration & Mail

- NCLER Resource: [The Older Americans Act and Home and Community-Based Services](#)
- Mailing services
 - Example: [PostalMethods](#)

Documents

What are the best options for remotely faxing or scanning documents with a large number of pages?

For Scanning

- Mobile apps/tools for scanning large documents:
 - Genius Scan (also has OCR and fax capabilities)
 - TurboScan
 - Tiny Scanner Free / Pro
 - Office Lens
 - iPhone “Notes” built-in scanner
- Low cost portable scanners

For Faxing

Online and Email to Fax services

- Hellofax
- Metrofax
- SmartFax
- SRFAX (HIPAA compliant)
- GotFreeFax (pay as you go)
- Some VOIP providers will also offer online fax service

What are remote options for forms that need to be notarized?

Remote Online Notarization

- Information available from the [National Notary Association](#)
 - State information
 - RON Platforms
- Check your state—may have rules in place or issued emergency authorization

What is the difference between remote and electronic notaries?

Privacy & Security

What are the security considerations for using tech tools to provide legal services remotely? How can we be sure that client privacy is protected?

Security Resources

- [TechSafety Net Resources and Guidance](#)
- [Digital Written Consent to Share Information](#)
- [Just-Tech Sample Emergency Work from Home Policy](#)
- [Sample confidentiality agreement for volunteers](#)
(appendix to Remote Legal Support Guide)
- Plain language privacy policies for end users
Example: [Citizenshipworks.org privacy policy](#)

We would like to provide outreach & education via You Tube, and are required to have an interactive component. But we are concerned that viewers will post personal questions or comments, without realizing that their name may be displayed if logged in to their account. How can we prevent this?

Information on Training Platforms

- You Tube Help Information
 - [You Tube Help: Live Chat](#) : adding a moderator for live chat and enabling “hold for review”
 - [You Tube Help: Comments](#) : holding comments for review before they show up
- National Council on Aging Tip Sheet: [Tools for Reaching a Remote Audience](#)

What are the alternatives to having staff use their personal phones, and are those options secure?

Court-Based Advocacy

How can we help our clients
access relief in court remotely for
urgent or serious matters?

Court Resources

- Center for Elders & the Courts: [Pandemic Resources](#)
- [National Center for State Courts](#)
 - Resources & links organized by state
- Upcoming NCLER Webinar: April 15th
 - [Strategies for Continuing Court Based Advocacy During the COVID-19 Pandemic](#)

Additional Resources

- [ACL & NCLER: Legal Assistance for Older Americans & COVID-19](#)
- [Tech Soup: Non-Profit Resources for Remote Work During the COVID-19 Outbreak](#)
- [Prepare.Respond.SERVE.](#)
- [Remote Legal Support Guide: A Best Practices Manual for Nonprofit and Pro Bono Innovation](#)
- [Legal Services National Technology Assistance Project](#)
- [Law Help Interactive](#)
- [Management Information Exchange: COVID-19 Resources](#)

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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.