Strategies for Providing Remote Legal Services to Older Adults

Hilary Dalin, Administration for Community Living
Sarah Galvan, Justice in Aging
Liz Keith, Pro Bono Net
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.
Lance Robertson

Administrator and Assistant Secretary for Aging
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.
NCLER COVID-19 Response

• Current Resources:
  • ACL Document: Legal Assistance for Older Americans & COVID-19
  • Webinar Recording: Helping Older Adults Facing Public Health Emergencies and the Aftermath of Natural Disasters
  • SSA Response to COVID-19
  • ACL COVID-19 Page

• Upcoming Elder Justice Toolkit Trainings (April)
• Technical Assistance & Case Consultations
About ACL

The Administration for Community Living was created around the fundamental principle that older adults and people of all ages with disabilities should be able to live where they choose, with the people they choose, and with the ability to participate fully in their communities.

By funding services and supports provided by networks of community-based organizations, and with investments in research, education, and innovation, ACL helps make this principle a reality for millions of Americans.

Hilary Dalin
Director,
Office of Elder Justice and Adult Protective Services
About Justice in Aging

Justice in Aging is a national organization that uses the power of law to fight senior poverty by securing access to affordable health care, economic security, and the courts for older adults with limited resources.

Since 1972 we’ve focused our efforts primarily on populations that have traditionally lacked legal protection such as women, people of color, LGBT individuals, and people with limited English proficiency.

Sarah Galvan
Senior Staff Attorney, Justice in Aging
About Pro Bono Net

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.

Liz Keith
Program Director, Pro Bono Net
Overview of ACL’s Actions

• Working closely with State, local, Tribal partners
• Multiple workgroups addressing different elements of response
• ACL involved in every level of HHS response
• ACL sharing information with aging & disability networks
• Needs the help of our network partners
Unprecedented Times

• We are all learning as we go
• We appreciate the immense dedication of legal aid providers to continuity of operations notwithstanding huge disruptions and immense safety concerns.
• This is temporary and should not be thought of as the “new normal”
• Keep us informed of both your challenges and successes
Key Topics

• Strategies and tools for remote operations
• Communications and outreach to client communities
• Remote service delivery models and tools
• Partnerships to enhance remote services
• Challenges and design considerations
Poll: Who is in the Audience?

a) Legal aid attorney or staff
b) Legal aid management
c) Aging services provider
d) IT staff
e) Others
Poll: What is your current work environment?

a) 100% remote
b) Mostly remote, but still some in-person work being done
c) Mostly in-person, with some remote work
d) Other
Remote Work
Serving the Older Adult Population During COVID-19 Pandemic

- Older adults are at high-risk if exposed to COVID-19
- Steps should be taken to:
  - Suspend in-person client meetings in the office and in client homes
  - Reschedule outreach events or make them remote
  - Request continuances or remote appearances for court dates
- Provide clear communication to current clients on upcoming court dates or appointments—there may be confusion about an expectation to appear
Access to Services & Information

- Internet access & use varies among the older adult population
- Phone access
  - Lifeline services
- Mail
- Some populations will rely on partnerships for communication:
  - Older adults in long-term care facilities
  - Older adults experiencing homelessness
Priority Setting & Planning

• Reallocation of staff time & intake priorities may be necessary

• Case types:
  • Termination of benefits or essential services, particularly those related to health care services, nutrition, and utilities
  • Eviction or ejectment from home or nursing facilities, assisted living facilities, and similar residential settings
  • Elder abuse or neglect issues with imminent danger and need for immediate intervention
  • Cases with upcoming court appearances that cannot be continued without risk of jeopardy to your client
What equipment is needed to effectively serve older adults remotely? Do we need high-tech tools?
Equipment or Technology Expertise Does Not Need To Be a Hurdle

• Primary tools for remote legal service are:
  • Phones
  • Computers
  • Cameras/recording devices
  • Internet access

• Considerations for staff using their own devices
Setting Up Phones

• VOIP Options
• Call-forwarding
• Google Voice
• RingCentral Office is available to nonprofits for free for three months
• TalkRoute.com offers a trial period
• Others?
Connectivity Considerations

• Internet Access options
  • Many service providers are offering discounted Internet access for new customers, expanding special programs for low-income customers, and boosting speeds on low-cost plans

• Consider purchasing hotspots (and/or cell phones with a plan that includes using it for a hotspot)
  • Example: https://www.mobilebeacon.org/devices/
  • TechSoup.org may have additional inventory

• Low-bandwidth areas
Checklist for Remote Work

• Appropriate technology, including laptops or tablets, printers, internet access, phones, etc.
• Access to case management systems
• Access to services needed to assist clients with disabilities or with limited English proficiency (i.e.: interpreter services)
• Hard copies of contact information for partners
• Legal research tools
• Program forms, such as retainer agreements, consent forms, and disclosure forms
What tools are available to help with workflow and internal communication?
Case Management Systems

• Uses
  • Managing intake
  • Sharing case information
  • Workflow
  • Note: Caution staff to log out of the system when not using it

• Non-Cloud Based Systems
  • Log Me In/Other Remote-In Services
  • Arrange for limited staff to access the systems in-office
Online Collaboration Platforms for Staff

• Microsoft Teams – Integrated with Office 365
• Slack – Good for organizing communication channels for group discussions or one-to-one messaging. Offering 3 month free trial for nonprofits
• Basecamp – Online project management platform (document sharing, messaging boards, etc.)
Resources for Remote Work and Collaboration

- What’s Your Company’s Emergency Remote Work Plan (HBR)
- A Guide to Managing Your (Newly) Remote Workers (HBR)
- Responding to the Coronavirus Outbreak: Resources to Help Nonprofits (Chronical of Philanthropy)
- TechSoup Nonprofit Resources for Remote Work During the COVID-19 Outbreak
- Free TechSoup Self-Paced Course on Pivoting to Remote Work
- NNEDV Resources on Remote Workplace Operations and Communicating with Survivors Through Tech
How can we let our clients know we are still open for business and how to reach us?
Communication Strategies – Stabilize

• Prominent website banner in plain language
• Inform partners of changes to services and availability
• Press release
• Inform constituent services staff for elected officials
• Social media
• Information at grocery stores and pharmacies with special hours for older adults (AARP is maintaining an extensive list)
• Ask these stores to include a flyer with delivery services
Communication Examples

HELPING CLIENTS WHERE THEY ARE: ELDER ABUSE PREVENTION UNIT STILL ACTIVE & ABLE TO ASSIST!

March 24, 2020

Idaho Legal Aid Services, Inc.
Advocacy. Education. Representation.

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.
Communication Strategies – Optimize

- Outreach through volunteer networks offering delivery services and wellness checks
- Informational cards or flyers provided through other “essential service” providers, including health care providers
- Contact your local newspaper or cable TV station directly. They may be eager for new and relevant content or offer PSAs
- Outreach through civic and faith-based organizations
- Outreach through companies that manage residences & communities for older adults
What models and tools can we use for remote services?
Remote Legal Support Models

- Phone advice
- Online, asynchronous forums
- Chat-based assistance
- Online/virtual clinics
- Broad-based access to legal rights resources and self-advocacy tools
Online forums and Chat-Based Assistance

• **ABAFreeLegalAnswers.org** – available in 45 states
• Use of LiveHelp / LiveChat
  • LiveHelp currently offered on ~14 statewide legal aid websites
  • Approximately 20% of these chat users are over age 65
  • If offered by a legal aid program in your state, consider contacting them about opportunities to collaborate, e.g.
    • Specialized outreach
    • Enhanced FAQs on critical issues
    • Warm referrals
    • Cross-website support
• Commonly used software: LiveChat and Comm100
How can we continue to make our clinics & self-help programs available to older adults?
Remote Clinic Model #1 – Low Tech

• Program uses a social services partner to assist with getting documents from clients who do not use email or online tools

• Program provides consultations to clients and prepares documents over phone

• Documents are snail-mailed back to clients with a letter describing brief services provided, instructions for their signature and submission of documents by mail
Remote Clinic Model #2

- Drop-in Virtual *Know Your Rights* workshop offered by phone and/or an online meeting platform
- This is followed by a Virtual Clinic for eligible clients held by phone or online meeting software
- Clients are told what documents to bring to the workshop and where they can get them
- Information about the Virtual Clinic intake process and how to submit documents is provided during the Workshop
- Clients need access to a computer and need to have a working phone number or email address
Remote Clinic Model #3

• Clients referred through hotline or other intake method

• Clients sign up for time slot and meet online with staff or volunteers through an online meeting platform

• Some programs using “breakout room” functionality in this workflow

• Clients receive brief advice, assistance with document preparation and referrals to other helpful resources
Remote Clinic Model #4

• Uses platform designed to manage remote legal support program and attorney-client collaboration
• Client referred to program after intake & screening
• Tools for legal aid pro bono coordinators to manage client and volunteer enrollment in remote program
• Real-time messaging and video-chat
• Document uploads by client and attorney
• Integrated with fillable PDF or online, interactive forms designed for advocates
Online Meeting Tools

• Zoom – offers limited free version and nonprofit discount

• LogMeIn – offering nonprofits with free, organization-wide use of many products such as GoToMeeting for 3 months through its “Emergency Remote Work Kit”

• Gruveo.com – offering 45 day extended trial period
Online Scheduling and Registration Tools

• Calendly.com – Useful for scheduling online meetings. Allows advocates or volunteers to pick slots for appointments

• Drag and drop online form builder tools
  • Wufoo
  • Zoho
  • 123FormBuilder
  • Google Forms
Remote Legal Support Platform Example
What tools are available to help us remotely create legal documents & get signatures?
Online legal forms

• LawHelpInteractive.org (LHI) is used by legal aid programs, courts, or their partners in 47 states
• Many forms exist in elder law issues areas
• Forms are designed for advocate and self-help use
• 36% of LHI users are in rural areas vs. 19.3% of national population
• 29% of users are 55+ (13% are 65+)
• Pro Bono Net can help connect you with programs creating or using forms in legal services to older adults in your state
Document Co-Preparation

• Phone-based support
• Use of online meeting and screen-sharing tools to prepare documents together
• LawHelpInteractive.org supports asynchronous & secure sharing of documents between clients and advocates (LHI Connect)
• Integration of online forms with remote legal support platform
Scanning & Sharing

• Microsoft Office Lens—scanner app for phone or tablet. Converts images into Word, PPT and PDF files.
  • ClearScanner app
  • Scanner Pro app
  • Adobe Scan app
  • iPhone Notes app
  • Others?
E-Signature Tools

- SignRequest.com
- DocuSign
- Adobe Sign
- SignNow
- Others?
We rely on our partners in the community to connect older adults to our services—what are strategies to continue this work?
Aging Services Partners

• Response and ongoing services depend on location

• Contact:
  • Ombudsman program
  • Area Agency on Aging
  • State Unit on Aging
  • Adult Protective Services
  • Nutrition services
Upstream & Hybrid Assistance Models

Person in Need of Assistance

Issue-Spotting / Screening Tools & Partners

Self Advocacy

In-Person Assistance

Virtual assistance

Organizations

Attorneys

probono.net
How can digital tools expand meaningful roles for community partners?

- Tools to facilitate on site or phone-based legal health “check-ups” & referrals to a partnering legal services program

With support from DOJ Office for Victims of Crime (OVC), PBN is developing replication support resources for the Risk Detector
Resources


Remote Legal Support uses technology to connect underserved communities to the legal services they need.

Learn how your organization can incorporate these models.

#RLS
probono.net

www.connectingjusticecommunities.com/remote-legal-support
NCLER Resources

• Legal Assistance for Older Americans & COVID-19
• Webinar Recording: Helping Older Adults Facing Public Health Emergencies and the Aftermath of Natural Disasters
• SSA Response to COVID-19
• Elder Justice Toolkit
• Legal Trainings
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.
Contact Information

• Liz Keith, Pro Bono Net
  • lkeith@probono.net

• Sarah Galvan, Justice in Aging
  • sgalvan@justiceinaging.org