Automated Workflow:
A Legal Helpline Case Study

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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.
NCLER Training & Resources for Senior Legal Helplines

• Webcasts:
  • Recognizing & Addressing Elder Abuse
  • Legal Ethics (Part One)

• Tip Sheets:
  • Reverse Mortgages
  • Recognizing & Addressing Elder Abuse
  • Legal Ethics (Part One)

• Technical Assistance & Consultations
  • ConsultNCLER@acl.hhs.gov
Why Focus on Technology?

• Helplines provide prompt, efficient, and cost-effective service
• Remaining open to new technology and systems can benefit clients’ access to services
• Not all systems or technology resources will fit every program
  • Evaluate
  • Test
  • Adjust
About Tennessee Alliance for Legal Services

- **Mission:** strengthen the delivery of civil legal help to vulnerable Tennesseans

- **What we do:**
  - Serve as a statewide coordination point for civil justice issues
  - Educate policy makers, advocates, and the public about civil legal issues
  - Connect vulnerable Tennesseans with civil legal help
In Tennessee:

6 out of 10 low-income people don’t seek help for their civil legal issues.

- 2014 Statewide Civil Legal Needs Assessment
Legal Services by Region

- Memphis Area Legal Services
- West Tennessee Legal Services
- Legal Aid Society of Middle Tennessee and the Cumberlands
- Legal Aid of East Tennessee
What is HELP4TN?

Legal Resources for Tennesseans

A single entry point to getting civil legal help and information in Tennessee, through a free legal helpline and online portal:

• 1-844-HELP4TN
• www.HELP4TN.org
Key Lessons

1. Why does defining a workflow matter?

2. What can we learn from the HELP4TN case study?

3. How does AI improve my business process?
Poll 1

Who do we have in the audience?

A. Executive Director
B. Staff Attorney
C. Non-Attorney Helpline Provider
D. IT Professional
E. Other
Poll 2

Do you currently have a helpline at your organization?

A. Yes
B. No
Assembly Line
What’s Your Current System?
Why We Chose KIM Technologies

• Ease of use (no code required)
• Real-time data tracking
• Future integrations
## Collecting Information

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<th>H</th>
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<td><strong>Summary of Caller’s Problem</strong></td>
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Forward Facing Form

Responding Attorney Information

First Name: *

Last Name: *

Helpline Designation: *

BPR#: 

Hours (in tenths):

Date Opened: *

Time spent researching & advising caller:

Caller Information

First Name:

Last Name:

County: 

Phone Number:

Pending Deadlines:

Contacted Legal Aid? 

How did you hear about us?

Summary of Caller's Problem:
Creating Forms

Form Display Palette (50 Rows x 3 Columns) - At runtime the Web Form appears as defined in the palette:

- Responding Attorney Information
  - First Name:
  - Last Name:
  - Helpline Designation:
  - Hours (in tenths):
  - Date Opened:

- Caller Information
  - First Name:
  - Last Name:
  - County:
  - Phone Number:
  - Contacted Legal Aid?
  - How did you hear about us?
  - Summary of Caller’s Problem:
Our Workflow
2017 Report

October 2017

- Provided Advice & Referrals, 66%
- Calls Pending, 21%
- Did not reach caller, 13%
2018 Report

October 2018

Did Not Reach Caller 5%

Provided Advice and Referrals 95%
2018 Case Numbers

Cases by Date Opened

<table>
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<tr>
<th>Year</th>
<th>Cases</th>
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<tr>
<td>2018-06</td>
<td>404</td>
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<td>2018-07</td>
<td>536</td>
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<tr>
<td>2018-08</td>
<td>502</td>
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<tr>
<td>2018-09</td>
<td>394</td>
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</tbody>
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Case Types

Volume by Funding Source

- Elder Trust Resolved
- Elder Trust Referred for Representation
- Model Approaches – Senior
- Senior Help – TCAD

Calls

0 100 200 300 400 500 600 700

NATIONAL CENTER ON LAW & ELDER RIGHTS
The KIM Platform

- Dynamic Case Management
- Document Management
- Workflow Automation
Lease Analysis & Management

- Submitting Leases
- Triaging Leases
- Managing Lease Review
Training KIM

- One Example
- Identify What’s Important to You
- 4 Hour Configuration
- Ideal, Not Advisable, and Bad Lease
Helpful Links

• Tennessee Alliance for Legal Services
• HELP4TN, a program of Tennessee Alliance for Legal Services
• Kim Technologies
• Intelligent Office
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.