

# Legal Hotline Connection

## August 2015

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The newsletter is produced by Elder Law of Michigan's Center for Elder Rights Advocacy, a partner in the National Legal Resource Center. For more information about CERA, visit [www.legalhotlines.org](http://www.legalhotlines.org). For more about the NLRC and to access its many resources, visit [www.nlrc.acl.gov](http://www.nlrc.acl.gov).

Staff at the Center for Elder Rights Advocacy:

**Keith Morris**, Project Director  
**Christopher Jackson**, Project Administrator  
**Darling Garcia**, Project Specialist  
**Mike Walters**, Project Specialist  
**Mary Haberland**, Project Specialist  
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# CERA focuses on innovation with the Senior Legal Helpline Technical Assistance Project

By Christopher Jackson, Communications Coordinator, Elder Law of Michigan, and Project Administrator, Center for Elder Rights Advocacy

The Senior Legal Helpline Technical Assistance Project, as part of the National Legal Resource Center, is a project of the Center for Elder Rights Advocacy (CERA), a program of Elder Law of Michigan (ELM). The goal of this project is to provide cost-effective, customer-centered technical assistance to professionals operating senior legal helplines (SLH) and to those wishing to establish a senior legal helpline in their state. CERA further prioritizes services and resources to assist senior legal helplines operating under the Model Approaches to Statewide Legal Assistance Systems (Model Approaches) project. CERA has been awarded a new grant from the Administration on Community Living (ACL) to provide these services, with the award period running through 2018.



During this grant period, CERA has a wide range of objectives to achieve including:

1. Provide a broad range of technical assistance to SLHs in designing systems of response for legal issues that emerge from cases of elder abuse, neglect, and financial exploitation;
2. Create legal trainings on emerging legal issues that SLHs are uniquely positioned to help resolve;
3. Develop a training curriculum for SLH attorneys that includes principles of supportive decision-making, person-centered planning, and other client-focused methods that focus on maintaining the independence and autonomy of the senior;
4. Identify outcome measures that quantify the beneficial impact SLHs have on the independence, health, and financial security of older adults in the most social or economic need;
5. Cultivate best practice models of innovative, low-cost mechanisms designed to enhance statewide legal service delivery capacity; and
6. Compile an updated list of Title III-B funded legal services providers and contact information.

CERA staff are made up of senior legal helpline managing attorneys and other professionals from across the country.

**Keith L. Morris, J.D., M.P.A.**, is the Director of the Center for Elder Rights Advocacy and the Project Director for the technical assistance to senior legal helplines project. He started as a volunteer at the Legal Hotline for Michigan Seniors and within several years, was the manager of the largest senior hotline in the country. He has many years of experience working with all aspects of running a senior legal helpline, from the phone system programming to the selection and retention of volunteers. He has presented over 50 workshops in the past fifteen years on topics related to operating a senior legal helpline. Since starting CERA in 2007, Keith has provided numerous hours of technical assistance to senior legal helplines throughout the country. He is regularly contacted for consultation on intake and screening, case management systems, referral processes, and case handling.



**Christopher Jackson, J.D.**, is the CERA Project Administrator and has been working with CERA for the past year, prior to which he served as a Hotline Attorney at Elder Law of Michigan. Chris has a strong background in technology, marketing, and communications. His has earned the reputation of being responsive, creative, and thorough with the senior legal helpline programs that he has worked with over the past year.



**Darling Garcia, J.D., LL.M.**, is a former Title III-B attorney handling cases in the areas of family law, mortgage and tax foreclosure, elder law, housing law, consumer law, and public benefits, and a Senior Legal Helpline Attorney at Elder Law of Michigan.

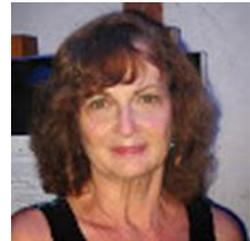


**Mary Haberland, J.D.**, manages the Centralized Telephone Intake (CTI) Unit at Bay Area Legal Services (BALS). In 2002, Mary developed BALS' Legal Aid Line, a five-county telephone intake program. She also established and manages the Florida Senior Legal Helpline, a free statewide legal advice and referral helpline that has provided services to thousands of elderly Floridians since 2006.

**Mike Walters, J.D.**, manages the Legal Hotline at Pro Seniors, Inc. in Cincinnati, Ohio, currently one of the largest SLHs in the country. Mike has been practicing law since 1991 and is admitted to practice law in the state of Ohio and the Commonwealth of Kentucky, as well as in Federal courts. Mike's practice has always included an emphasis on Social Security issues.



**Shoshanna Ehrlich, J.D.**, is a CERA Program Consultant and was a senior legal helpline specialist for over 20 years. Prior to joining CERA, she served as the Manager of the AARP Foundation Technical Support for Legal Hotlines Project. She joined the Legal Hotlines Technical Support Project after working at the Legal Hotline for Older Floridians – Legal Services of Greater Miami, Inc. for six years, as Director and Supervising Attorney.



Continue to follow us on the [CERA Blog](#) to read about further developments in the CERA program and senior legal helplines across the country.

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## 5 Pieces of Software to Make Your Life Easier

By Keith Morris, President, Elder Law of Michigan, and Director, Center for Elder Rights Advocacy

For those of you that know me, you know how much I love technology. I also love to find and try new programs and services. Here are just a few of the ones that I have tried recently that I think you might find helpful.



1. [Remote Utilities](#): This is a great utility program if you have staff that carry laptops offsite to do their jobs or if you provide technical support for offices remotely. Once installed on the laptop, you can set it up to always run so when you need to do technical support, you can quickly access the laptop if it is connected to the internet. It is very simple to set up and use. The free version allows one person access to 10 remote computers. Beyond that, there are several licensing options available.
2. [Microsoft OneNote](#): If you haven't tried this one out yet, you definitely should now that they give such a good deal to nonprofits. They even make it free for personal use. With OneNote, you can collaborate on your work with others and can see the changes as

they are being made. Also, because you can set your own notebooks, it is easy to stay organized on projects. I also like the screen clipping tool and the ability to print to OneNote as if it were a printer. All of these features, along with a great phone app, make OneNote worth checking out. (Related to OneNote is [diigo.com](http://diigo.com) – which has some interesting features to check out when you have time.)

3. [Ragic.com](http://Ragic.com): I am a really big fan of this website because it allows you to set up a spreadsheet that has the functionality of a database. Everyone on our staff that used it found it easy to use and helped them understand the database concepts. It isn't that great for complicated databases, but will work great for handling data. It isn't free, but the licensing is reasonable.
4. [If This, Then That](http://If This, Then That) and [Zapier](http://Zapier): Both of these are great tools for helping to automate the process. Basically, you can set it up so that if something happens in one program, something else in another program will automatically occur. For example, if I schedule a meeting on my calendar, it will create a OneNote file for the meeting agenda. Both of these services have literally hundreds of other programs to use for automating your work process. While If This, Then That is free, Zapier does cost about \$20/month.
5. [Avast](http://Avast): This is a great find in terms of anti-virus and anti-malware. Avast provides free services for businesses, with some additional features available for a monthly fee. Avast allows you to deploy its anti-virus software to all of your computers, which can then be monitored through their online dashboard. If a computer you have installed the software on detects a threat or hasn't updated in awhile, Avast sends you an email alerting you of the issue. Additionally, Avast uses one of the lowest amounts of memory of all anti-virus software.

Do you have a piece of software that you use that others might not know about? Feel free to share it in the comments below.

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## National Aging and Law Conference, Oct. 29-30

On October 29-30, 2015, the Commission on Law and Aging and the Center for Professional Development will sponsor the National Aging and Law Conference in the Washington, DC, area. CERA is proud to be a co-sponsor of the event.

The theme of the 2015 National Aging and Law Conference is:



National Aging  
and Law  
Conference



## Celebrating Anniversaries with Action

2015 marks the following:

- 80th anniversary of Social Security;
- 50th anniversary of Medicare and Medicaid;
- 50th anniversary of the Older Americans Act;
- and, the 25th anniversary of the Americans with Disabilities Act.

Conference attendees will enjoy:

- Low registration rates and a two-day agenda to minimize travel time and costs;
- An anticipated 4 plenary sessions and 24 workshops;
- A focus on core substantive legal issues affecting older Americans with the greatest economic and social needs;
- Programming on legal service development and delivery;
- and, high-quality written materials.

More information about NALC can be found on [the ABA's website](#). Early bird registration ends on August 28th!

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## Senior Hotlines Detailed Outcome Study

By Michael Walters, Legal Hotline Managing Attorney, Pro Seniors, Inc. and Project Specialist, CERA

Recently, the Center for Elder Rights Advocacy began a national study on measuring more detailed outcomes on a legal hotline. Currently, Elder Law of Michigan, the Florida Senior Legal Helpline, and the Pro Seniors' Legal Hotline in Ohio are participating in the study. The involvement of these three hotlines is significant, as they represent several of the highest volume senior hotlines in the United States (in 2014, these three hotlines closed 12,817 cases, representing approximately one-quarter of the total number of senior legal hotline cases



closed in the United States for 2014). The number of cases and clients reached through these hotlines should provide a representative sample of senior hotlines throughout the U.S.

Measuring detailed outcomes on a hotline is a challenging task because hotline calls often come when the problem is first identified. In areas such as debt collection, one call is often sufficient to resolve the client’s problem. But in other areas, such as eviction, legal advice can “set the table” for later resolution of the problem. Fortunately, hotline callers often follow up for more advice as their legal issue develops, and it is hoped that we can capture more specific detailed outcomes on follow up calls.

The study, in conjunction with the United States Administration on Aging, officially began May 1. Data is therefore very preliminary. The hotline attorneys at Pro Seniors began experimenting with capturing detailed outcomes in preparation for the study in April.

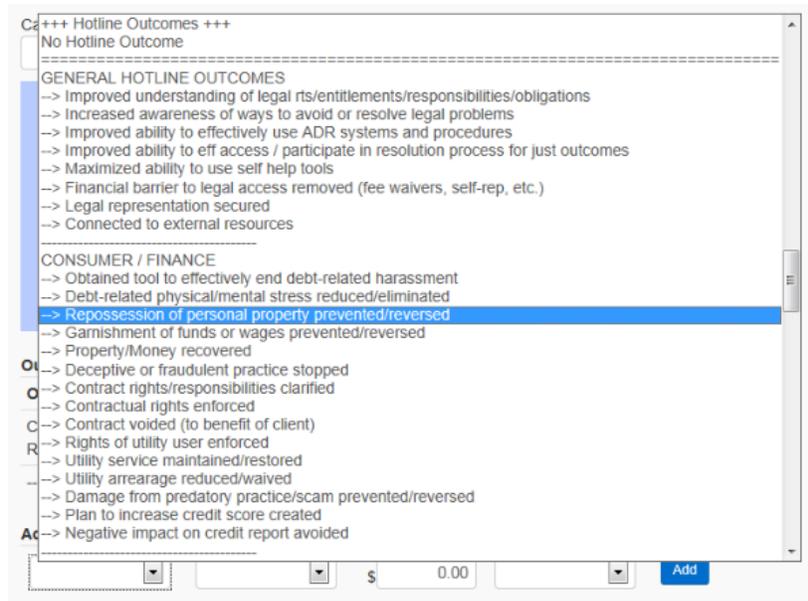
Kari Deming, formerly of CERA, looked at possible detailed outcomes that could apply in the senior hotline context and developed a proposed list. The list includes a set of general hotline outcomes as well as possible detailed outcomes specific to particular legal problem codes. We also added an additional outcome; “No Hotline Outcome.” This allows us to be assured that the hotline attorney considered detailed outcomes and found no detailed outcome to be appropriate. Lack of any detailed outcome without selection of the “No Hotline Outcome” choice will allow us to remove cases from the study where the lack of a detailed outcome selected is more likely the result of an accidental omission. The list of possible outcomes can be found here: [Hotline Outcomes List](#).

At Pro Seniors, we have the ability to select more than one outcome, through the use of “Add a New Outcome or Award” fields in our case management system. The field allows the hotline attorney to select more than one detailed outcome when appropriate. It also allows a hotline attorney to add a new detailed outcome on a follow up call. Most importantly, it continues to allow us to use the general outcomes that have been historically required by our funders.

Outcome	Award Amount	Rate	Actions
Client demonstrated learning of Rights, Responsibilities and Remedies	\$0.00		Delete
--> Legal representation secured	\$0.00		Delete

Add a New Outcome and Award

\$ 0.00



So far, not surprisingly, data from all three programs indicates that general detailed outcomes are selected with overwhelming frequency over more specific detailed outcomes. In the hotline context, “Accuracy of public benefits eligibility confirmed/corrected” would be appropriate when explaining Medicaid eligibility to a client. “Income increased (current/new program eligibility)” would be rare, and would more likely apply to a full service unit. So far, all three programs record the three outcomes listed below with the most frequency:

- Improved understanding of legal rights/entitlements/responsibilities/obligations.
- Increased awareness of ways to avoid or resolve legal problems.
- Maximized ability to use self help tools.

It is possible, depending on the program, that more than one detailed outcome may have been recorded on a case. It is hoped that as follow up calls occur, more specific detailed outcomes may become apparent. The above three outcomes account for substantially more than fifty percent of the total detailed outcomes recorded at all three programs. Beyond those three detailed outcomes, there are a few variances. For example, Pro Seniors records the outcome, “legal representation secured,” with regularity, probably as a result of our modest means referral program. Michigan frequently records the outcome, “improved ability to effectively access and participate in the resolution process to achieve just outcomes,” and Florida often “created a plan to obtain public benefits,” probably as a result of brief service cases.

The benefits of recording detailed outcomes should be balanced against the additional time constraints placed on the hotline attorney when recording detailed outcomes. As noted by Jan May, Executive Director at AARP Legal Counsel for the Elderly, in *Tempering the Need to Measure Outcomes with Common Sense: Hotlines as a Case in Point*, MIE Journal, Volume

XXVI, No. 3, Fall 2012, pg. 45, an over-emphasis on measurement can actually reduce the amount of service provided to clients if the hotline is not careful in how the tools are made available to the hotline attorney. It is important that the tools available are efficient, and that the hotlines attorneys are trained not to devote an excessive amount of time into considering which outcome is the “best” fit for the client. So far, we have received positive feedback from the hotline attorneys at Pro Seniors about detailed outcomes.

It is hoped that through the capture of detailed outcomes, senior helplines can help produce evidence-based data to show the value of the advice given by senior helplines. Intuitively, we know from client feedback that we are a critical legal resource for seniors, but this study should allow us to produce more detailed data to demonstrate that value we have to our clients.

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## Florida Senior Legal Hotline case benefits 33,000 SNAP recipients!

By Mary Haberland, Managing Attorney, Florida Senior Legal Helpline, and Project Specialist, CERA

To appreciate the potential efficiency and power of a statewide senior legal hotline which is well-integrated with the state’s III-B legal services providers’ network, we can look at a food stamp (SNAP) case that started with the Florida Senior Legal Helpline (FSLH), and ended a year later with an estimated \$1,177,830 in retroactive SNAP benefits payable to low-income Floridians.



Client was an 84 year-old widower who lived alone in rural Calhoun County, Florida, and whose sole source of income was Social Security of \$948/month. The closest Legal Services office was an hour from his home. In 2013, Client, who had received food stamps for 20 years and had recently recertified, was surprised to receive a notice informing him that he was no longer eligible for food stamps because of his income. After unsuccessful attempts to resolve his eligibility issue with his local Department of Children and Families (DCF) office, Client turned to the internet, where he found information about the FSLH, managed by Bay Area Legal Services in Tampa, Florida. During his telephone intake, Client gave the SLH attorney permission to access his online public benefits file, and further agreed she could share the file with a public benefits attorney from Florida Legal Services (FLS), which provides technical assistance and support to attorneys working in Florida Legal Services and Legal Aid offices.

The attorneys' review and research, coupled with the client's telephone input, led them to conclude that Florida's SNAP eligibility standard was inconsistent with the federal regulation. On the basis of that conclusion, the SLH attorney advised the client to file for a fair hearing. The client agreed, and the SLH attorney referred him to his local program through their cooperative referral partnership. The local program attorney filed for a fair hearing on client's behalf, supported by FLS advocates, and additionally, partnered with them to file a rule challenge with the State Division of Administrative Hearings on the ground that the rule was inconsistent with federal law.

Both efforts were highly successful. As a result of the fair hearing, Client's individual benefits were restored, and through the administrative rule challenge, his case triggered a stipulation which bears his name. The result granted new or restored benefits to more than 33,000 SNAP recipients, and favorably changed the eligibility determination for applicants from the inconsistent state standard, to the federal standard.

With a single telephone call to a resource he discovered online, a senior of extremely limited means who faced a two-hour round trip to the nearest Legal Aid office was able to set a process in motion which not only resolved his legal issue, but which ultimately affected thousands like him. This outcome was possible because a senior legal helpline provides a convenient point of entry into the free legal services network, and a center for collaboration among legal providers at all levels of the senior services delivery system.