

**LEGAL HOTLINE EVALUATION CRITERIA**  
**Center for Elder Rights Advocacy**  
**Technical Assistance for Legal Helplines Project**

**A. DOCUMENTATION OF CASES**

1. Do advocates develop and record all facts necessary to identify the question or problem presented by the caller?
2. Do advocates clearly analyze caller's factual situation, identify and record all questions or issues raised?
3. Do advocates clearly record all legal information, advice or other service provided to the caller?

**B. CONSISTENCY AND COMPLETENESS OF SERVICE PROVIDED**

1. Do advocates give consistent and complete answers to questions?
2. Do advocates have time and resources to research answers to complex questions?

**C. PROBLEM RESOLUTION**

1. Do advocates demonstrate a good understanding of the goals and objectives of the Helpline program and exercise a diligent effort to resolve caller's problem to the full extent allowed by the program?
2. Do advocates demonstrate a knowledge of and appropriate reliance upon alternative resources available to resolve caller's legal or non-legal problems in cases where the Helpline was unable to do so?
3. Does the program have an established referral protocol for advocates to follow when referring a client for additional services?
4. Do advocates have access to legal materials necessary to properly respond to a caller's questions or problems?
5. Do advocates send follow up materials to client as needed?

**D. CASE MONITORING**

1. Does the Manager or Supervising Attorney identify problems in case handling and address these with appropriate training or re-training of advocates?
2. Do case notes show evidence of prompt follow up (clarification, amplification, correction of previously recorded information and/or advice)?
3. Does the Manager follow up on referred cases to determine outcome?
4. Does the Helpline have a follow up system for determining client outcomes and satisfaction?

**E. PRODUCTIVITY**

Does the program achieve a call/case per hour ratio and cost per call/case which is comparable to other Helpline programs providing similar services?