

# Assuring Quality at Legal Helplines



**CERA Webinar**  
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The Center for Elder Rights Advocacy is a partner in the National Legal Resource Center.

# Third Party Policy - Example



- The hotline advocate must **determine who the client is** – the person on whose behalf the call is purportedly made – or the caller;
- Once the advocate determines that the client is not the caller, he should **attempt to speak with the actual client or get permission from the client to speak to the caller** on his behalf;
- If the client cannot speak to the helpline, the advocate must **determine whether there is a potential for conflict between the caller and client**;
- If there is little conflict potential, the advocate may **give information and limited advice on a case by case basis**.

# Casenote Criteria



Sample Casenote Formula (*avoid passive voice*)

1. a 1-3 sentence recitation of relevant facts;
2. a 1-3 sentence statement of the applicable law as explained by the advocate to the client;
3. a concise summary containing the advice the advocate gave the client on resolving his problem.

*E.G. Client has a written lease which is expiring and has no mention of renewal or notice requirements. Landlord intends to raise the rent from \$700 to \$800. Client wants to know if landlord may do that. I told client there is no rent control law and the landlord may raise the rent any amount after the lease ends. I suggested she negotiate with the landlord for a smaller increase. If the landlord doesn't agree, I told her she will have to choose whether to pay the increase or move.*

# Casenote Criteria



Examples of issues you may require your advocates to include in casenotes:

- Statutes of limitations for any cause of action or administrative procedure the advocate discussed;
- An evaluation of the merits of client's position;
- Procedural steps the client needs to take to resolve his problem;
- Specific statutes relevant to the facts;
- Attorneys' assessment of a caller's dementia or intoxication if relevant.

# Quality Control



- Casenote Review
- Casenote Retention/Security
- Productivity

## 2008 Productivity:

Average Number of Cases Per FTE: 1,109

Average Number of Hours Per Case: 1.2

# Online Intake



You can view online intake forms here:

California Senior Legal Hotline

[www.seniorlegalhotline.org](http://www.seniorlegalhotline.org)

Legal Aid Line of Western Ohio/Advocates for Basic  
Equality [www.legalaid.org](http://www.legalaid.org)

Legal Services of North Dakota

[www.legalassist.org](http://www.legalassist.org)

# Resources



- ABA Standards for the Operation of a Telephone Hotline
- ABA Rule 6.5 – conflicts
- Legal Hotlines: A How to Manual 2d edition 2002
- *Casenote Considerations, LHQ Spring 1998*
- Senior Legal Helplines Annual Reports
- [www.legalhotlines.org](http://www.legalhotlines.org); [www.lsntap.org](http://www.lsntap.org)