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Workshop 072: Maintaining the Quality of Hotline Advice Through Checklists, Scripts and Outlines

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Brief Session Description: Checklists, scripts and outlines combine technology, substantive law, eligibility criteria, and service resources to make the hotline calls flow more efficiently both for the client and the program. The workshop includes a multi-media presentation on issue-specific Microsoft Word Templates that serve as comprehensive clients screening tool, particularly useful for low-income, rural, elder and disabled populations. The panelists discuss the steps used in developing client-screening scripts, applying the technology to specific agency needs, and converting existing program scripts and checklists to meet your programs needs. Online outlines to help advocate give accurate and complete real-time advice are previewed.

Topical Outline: Doubling Your Efficiency: Using Microsoft Word Templates to Conduct Client Intake, Erin McBride and Brynne McBride

While “Play it again, Sam” might have worked for Bogey, today’s busy senior, parent, or renter doesn’t have time to repeat her story again and again. Staff attorneys Erin McBride and Brynne McBride had efficiency in mind when developing a legal “Helpline” for their agency’s rural service area. With issue-specific Microsoft Word Templates as screening scripts, the client need only tell her legal problem once - saving both the caller and the attorney valuable time. Similar to online shopping, a screening Template allows the user to read a set of pre-determined questions and choose a particular response from the corresponding answer space, check box, or pull-down menu. As an online purchaser would select a “gray” sweater in a size “medium,” our Landlord/Tenant Helpline Template, for example, allows the paralegal to choose the “month-to-month lease” option, payable at the “end of each month.”

This multi-media presentation explores the template form technology, discuss the steps used in developing client-screening scripts, and apply these tools to specific agency needs. Workshop attendees will be provided with written samples and development resources

I. Introduction to Wisconsin Judicare, Inc.'s Legal Hotline
    a. Attorney Erin McBride developed Judicare's legal telephone Helpline in early 2004. On March 15, 2004, she spoke with the first Helpline caller.
    b. The Helpline benefits the entire Judicare service area, which consists of Wisconsin's northernmost 33 counties, in addition to the state's 11 federally recognized Native American Indian Tribes.
    c. The Helpline is available for financially eligible clients, calling with "simple" legal questions.
    d. Nearly 100% of the Helpline's 32,000 square mile service area meets the US Census definition of "rural." By 2004, over 10% of the population lived below the poverty line.
    e. Summary:
        i. The Helpline has as its main goal answering the client's legal queries while simultaneously providing each caller with a greater sense of peace of mind.
        ii. From day one, the practices and procedures for operation have been constantly monitored and modified to accomplish client satisfaction. Judicare has learned a substantial amount in such a short amount of time, and will continue to explore new methods for improving the Helpline.
    f. Benefits of the Helpline:
        i. Callers may speak to intake and administrative staff, but need only tell their story once.
        ii. Callers receive accurate, comprehensive service. Experienced attorneys answer the hotline calls, while paralegals specialize in screening and informational intake procedures.
        iii. When calling into the legal Helpline, a client receives the fast, efficient service he/she deserves.
        iv. The Helpline increases access for Judicare clients who are in remote locations, employed, disabled, or have other travel restriction, yet allows for the customary "walk in" clients.
        v. In light of recent cutbacks in client representation, the Helpline allows the office to continue to provide brief service, advice and/or referrals to Judicare clients on limited legal topics.
        vi. The underprivileged person receives as equal an opportunity in civil legal matters as the privileged person without compromising the dignity of the people involved.
        vii. The residents of the Judicare service area are informed and educated of their legal rights and responsibilities through a variety of appropriate projects and media.
    g. Recent Improvements and Next Steps:
        i. Recent changes include the following: Expanded hours and topics; more computerized screening systems; translated materials, ads, and brochures; completed client and staff satisfaction surveys and Helpline effectiveness study; and production of a monthly newsletter for staff, Board members and interested parties.
        ii. The Helpline anticipates the following next steps: Further expand hours and topics; continually improve screening systems; post screening scripts on the agency website, not just in the internal network; continue to integrate

screening into the case management system; increase advertisement of the Helpline; and continue conducting satisfaction and effectiveness studies.

h. Topics Addressed on the Helpline:
    i. Landlord/Tenant; Utility Shut off; Security Deposit; Basics of Divorce; Post-divorce; Credit/Financial Matters; Employment; Bankruptcy; SSI/SSDI; Animal/Pets; Other Civil
    ii. Distribution of Calls: 51% Landlord Tenant; 18% Divorce; 13% SSI/SSDI; 6% Credit/Bankruptcy; 4% Employment, 3% Financial Disclosures; 2% Utility Shut Offs; 2% Other Civil; and 1% Child Support
    iii. Clients with issues not conducive to a Helpline format are provided with appropriate referral resources and are sent informational materials.
i. Helpline "Spin-off" Projects
    i. ***Wednesday Night Law Talk***: This volunteer lawyer program operates monthly. Local attorneys specializing in pre-determined legal topics answer calls from eligible participants "after hours."
    ii. ***Legal Grounds Wisconsin***®: This newly created volunteer lawyer project will run monthly. Local attorneys and Staff attorneys will answer legal questions either by phone or in person at a designated location, with both coffee and advice provided free of charge.

II. The Helpline's Three-Step Process
a. STEP 1: Applying for Legal Service
    i. A receptionist answers the local or toll free phone line, Monday-Friday, 8:00-4:30 CST.
    ii. The receptionist or intake personnel assist the caller in applying for the legal service program, if the caller is not already a client. This information is entered into the case management system. A conflict check is also conducted at this stage.
    iii. The receptionist assigns the caller an appointment time, or queues the callers in a first-come, first serve basis.
    iv. The caller is transferred to the informational screener (paralegal).
b. STEP 2: Screening for Legal Issue
    i. The screener again checks for conflicts, and then asks the caller's legal question. If the issue is not Helpline appropriate, the screener will provide information on Judicare participating attorneys or local resources.
    ii. The screener asks a pre-determined set of questions for that particular issue, and types the caller's answers on the appropriate script.
    iii. The screener prints the completed script and the conflict check case management form, and fills out a procedure checklist.
    iv. All information is collated and handed to the Helpline attorney before the caller's appointment time.
c. STEP 3: Speaking with an Attorney
    i. The attorney reviews the caller's information, makes adjustments or preparations, and then speaks with the caller at the designated time.
    ii. The attorney discusses solutions and resources with the caller and attempts to provide enough information to help resolve the current problem and aid the caller in preventing the situation from arising again.
    iii. An average attorney-client conversation is 30-45 minutes.
    iv. After the call, the attorney writes a letter to the client, including information discussed during the conversation, relevant rules or guidelines, contact

information, and a non-engagement paragraph. This follow-up letter is sent with enclosures such as brochures or relevant statutes.

v. The letter, screening papers and notes/information on the caller are stored in a client file and in a central Helpline binder. All letters are saved in an electronic database by legal issue and name.

III. Using Word Template Scripts

a. Why Word Template Scripts?

i. In the past, word processors were not able to effectively fill in forms. Screening clients involved opening a new document for each client or typing in answers on a pre-printed form.

ii. It was also customary for the client to repeat her legal problem several times, to the receptionist, the paralegal/advocate, and then the attorney.

iii. Template Forms are an efficient and consistent way to collect and distribute client information in-house.

b. Form Basics

i. A form is a special kind of protected document. When someone fills in a form, they're working on a copy and the original stays unchanged. Information can be typed only in the designated fields, or blanks.

ii. A form field is a location on-screen where you can do one of three things: enter text, toggle a check box on or off, or select from a drop-down list

iii. Forms can be created within Microsoft Word documents without having to purchase any additional software.

c. Using Word Template Scripts

i. The form features available in Microsoft Word are a big step in doing away with pre-printed forms.

ii. Now, an office can design forms for each topic of interest, complete and save to the desktop, and print on demand.

iii. Forms can be distributed electronically, kept in a shared folder, or left for users to complete online.

d. How to Create Microsoft Template Scripts

i. Creating new templates: build the form structure, add labels, format, shading and borders:

1. Sketch out on paper what you want the form to look like.
2. Design "flow charts" or an outline of the legal questions or steps for that issue.
3. Open a Word document, and build the script using the "Forms" toolbar.

ii. Inserting form fields:

1. Once a Word Document is open, type questions or statements on the document as if typing a letter.
2. Use the "Forms" toolbar to insert text, check boxes and dropdown lists throughout the script in locations where the answers to those typed questions should appear.

iii. Editing, Protecting and Saving the form:

1. Use the forms toolbar to easily protect or unprotect the form: when the lock button appears pressed, the form is protected.
2. Changing the formatting, adding graphics, or changing the form field properties in the document may enhance the look of a form.

3. When finished working on the form, print or distribute the form electronically so users may complete the form online.
4. To distribute the form electronically, save the form as a template "**.dot**" so each user creates a separate document with his/her response.
5. Send the form in an email message or store the form in a central location where others can access the file, either on an internal network, or on a website.

IV. Sample Scripts

a. The first scripts created focused on screening clients for information regarding their Eviction, Repairs, Security Deposits, and Utilities/ Shut off notice problems.
b. The legal issues that vary considerably from client to client (such as SSI or SSDI) are screened with a generic script. That form has larger form fields, allowing the paralegal to type verbatim the client's situation or symptoms.
c. Samples of these scripts are available in paper form at the workshop. Computer files containing the interactive scripts are available by contacting Erin or Brynne McBride

V. Resources

a. Books:
   i. <u>Step by Step Microsoft Word</u>, Microsoft Press, Perspection, Inc. 2001, includes CD-ROM practice guide
   ii. Ron Person, Karen Rose, <u>Using Word, Version 6 for Windows</u>, Special Edition, Que Corporation, Features step-by-step examples
   iii. Walter Glenn, <u>Word 2000 in a Nutshell: A Power User's Quick Reference</u>, O'Reilly & Associates 2000
   iv. Bob Flisser and Wendy Richardson, <u>Just the Tips, Man for Microsoft Word 2000</u>, Nerdy Books 2000
b. Websites:
   i. Legal Hotline Quarterly: http://www.legalhotlines.org
   ii. http://www.wellesley.edu/Computing/Word/formtemplates.html
   iii. http://www.seattleu.edu/it/training/Manuals/wrd003a.pdf
   iv. http://www.seniortechcenter.org/reference_library/software/wordform.php
   v. http://jan.ucc.nau.edu/~lrm22/technology/wpbasics/wpbasics.htm