

Developing, Maintaining and Managing an Agency-Wide Technology-Based Legal Services Initiative

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Overview

- Brief introductions
- Overview of technology-based legal services at CELJ
- Timeline – bringing technology-based legal services together
- Benefits and hurdles of centralized technology-based legal services unit
- Putting Knowledge into action
- Q & A



Senior Legal Advice Helpline

- The Legal Advice Helpline is a free service provided by the Center for Elder Law and Justice, which provides answers to brief legal questions and referrals to other legal resources for individuals across New York State.
- The helpline is staffed by attorneys who will answer questions on a wide variety of legal issues, including consumer protection, health insurance, housing issues and more.



Senior Legal Advice Helpline

- Initially operated with only live-calling option
- Expanded to include voicemail and email callbacks during COVID
- Uses a comprehensive “Legal Service Manual” to train staffers and give advice to callers



Legal Risk Detector App

- The Legal Risk Detector App is a FREE program developed with Pro Bono Net that service providers can use to screen seniors for potential legal issues. Referrals are sent directly to the Center for Elder Law & Justice once the assessment is complete.
- The app is a web-based legal health “check-up” tool that allows medical personnel, social workers, and other allied professionals to screen older adults, including home bound people, for common legal issues, including abuse and financial exploitation. The Risk Detector covers financial exploitation, consumer, housing and health care matters, and is designed to more comprehensively reach and serve a population that is vulnerable to various forms of elder abuse, but difficult to serve through traditional legal services.



Legal Risk Detector App

- The Legal Risk Detector app is designed for use on tablets, laptops, and mobile devices. Users can choose from "Standard" or "Express" screenings based on the time available during their home visit or other factors, and to capture additional notes about vulnerabilities, for example if the client received a verbal but not written notice of eviction, or if the social worker observed repairs needed in the household.
- The Risk Detector provides the advocate with an assessment report that categorizes the client's risk as "low," "medium," or "high," identifies red flag issues, and automatically emails a report to Center for Elder Law & Justice for follow-up and appropriate action.



Senior Financial Safety Tool

- A web-based tool that allows community partners to screen older adults for signs of potential financial exploitation
 - We provide a telephone screening option on Tuesday s from 12:00-2:00 PM
- Older adults may also self-screen for risk of financial exploitation
- Partnership with Pro Bono Net, Neota Logic, Lake Shore Savings Bank, Erie County APS, and Evans Bank



SFST

- The interview is short – should take about 5 minutes to complete
 - Four sections: Age/financial questions, Power of Attorney inquiry, scam/solicitations inquiry, and contact with family & friends
 - When you select an answer, additional questions may populate based on your response
 - If the follow-up questions are not relevant, they will not appear.
- At the end of the application, it generates a report detailing possible risks of financial exploitation; provides a list of resources, referrals, and financial best practices; and offers an optional referral to CELJ



SFST

- Specific in scope – meant to be used when financial exploitation is suspected
- Referral to CELJ is offered but not required
 - If the older adult is interested in legal assistance, we are available to help; if not, they still have access to the report and all of the resources
 - Information is not contingent upon CELJ's involvement
- Technology is the driving force but not the only option



SFST

- COVID significantly derailed plans
 - Initial launch planned for March 2020
 - Pivoted to virtual trainings
- Worked with funders
 - Able to extend the grant period



Mobile Legal Unit (MLU)

- Portable law-office setup allowing attorneys and paralegals to visit hard-to-reach populations to provide brief legal services
 - “Office in a bag”
- Focus on **limited scope representation**
- Offer brief presentations and individual legal consultations
- In-person or virtual options



MLU

- Provide education and awareness
 - Get the word out about CELJ's services and issues facing the community
 - Public awareness of available assistance
- Connection with communities and individuals
 - Brings assistance to trusted spaces
 - Relationship building
- Identify potential legal issues facing community members



MLU

- Increases accessibility for clients
 - Transportation
 - Internet access
 - Limited resources
- Focus on flexibility
- Agency-wide involvement



MLU

- Initially conceived as in-person event, then went dormant due to COVID
 - One or two virtual appearances
 - Zoom is not intuitive for everyone
- Revitalization – almost tripled our numbers from 2020 to 2021
 - Focus on increasing our reach in outlying counties
 - Focus on creating partnerships in the community that extend beyond the event



Timeline For Program Development

- Helpline – stand-alone initiative
 - Developed to increase direct access to justice by providing telephone-based brief legal services and referrals
 - Funded initially by NYS OCA funding, other funding streams added to increase geographic scope and functionality



Timeline For Program Development

- Legal Risk Detector and Senior Financial Safety Tool
 - Developed independently of each other but both under CELJ Elder Abuse units
 - Developed in order to provide legal screening tools and referral assistance to partner organizations that provide non-legal services to seniors (APS, hospital social workers, financial institutions)
 - Funded by DOJ OVC grants



Timeline For Program Development

- Mobile Legal Unit – outreach initiative
 - Developed by CELJ Innovations Committee initially to aid at outreach appearances
 - Once developed, was initially housed under CELJ Outreach/Development program
 - Later managed in part by CELJ Elder Abuse unit in order to acquire additional funding for MLU by tying it to SFST initiative



Timeline For Program Development

- Technology-Based Legal Services Unit
 - Initiative began under Elder Abuse unit due to similarity of Risk Detector and Senior Financial Safety Tool
 - Grew to include MLU due to tying MLU funding to SFST
 - Addition of Helpline and formalization of technology-based legal services unit conducted to reduce effects of staff turnover and consolidate responsibilities
 - Consolidation and growth of tech-based legal services accelerated by COVID pandemic response



Timeline For Program Development

- Technology-Based Legal Services Unit
 - Required knowledge of conditions across several funding streams
 - Tech initiatives funded by several county, state, and federal grants
 - Improved agency coordination with grant funders due to complexity of projects funded by multiple streams
 - Strong project management skills in addition to traditional legal services
 - Initiative helped to centralize project management process in the agency



Managing Tech Projects as One Unit

- **Benefits**
 - Familiarity with project management & replication processes
 - Centralized project management for tech initiatives
 - Sharing resources
 - Tech used at MLU was distributed for staff to work from home during lockdown
 - Featuring other projects at MLU
 - Ease of training
 - Training staff on LRD and SFST is very similar
 - Staff get trained on tools & tech while learning about MLU & outreach

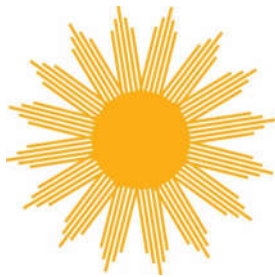


Managing Tech Projects as One Unit

- Obstacles
 - Utilizing resources received from different funders
 - Talk to your funders – sometimes it works and sometimes it doesn't
 - Finding funding to continue projects
 - Adjust projects to fit parameters
 - Lack of tech buy-in across the agency
 - Acknowledge varying levels of comfortability around technology
 - Staff members resistant to change
 - Encourage open communication



Put Your Knowledge To Work



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Hypothetical

- Best Ever Legal Services Agency (BELSA) provides free legal services to indigent people in the areas of housing, consumer protection/collections, simple estate planning/substituted decision making (wills, POAs, HCPs), and assistance with simple tax filing. The agency also regularly schedules clinics to assist individuals in identifying public assistance programs for which they may be eligible, and then directing them to the appropriate government agency. BELSA is funded primarily by a state-level grant, renewed each year, which provides the bulk of the agency's operating expenses. BELSA also has some private donations earmarked for certain programs and a small, non-LSC federal grant.



Hypothetical Part 2

- In the consumer protection unit, clients frequently complain of other legal issues that have arisen due to lack of funds from high debt and scam victimization. However, this unit is severely understaffed, meaning the attorneys and paralegals are unable to devote time and energy into properly identifying and triaging these other legal issues. The consumer unit is funded by BELSA's state grant.
- The tax filing unit has a "tax travel bag" containing an Internet jet pack, tablet computer, and mobile printer. This allows the tax unit to use home visits to complete tax returns and file them electronically. The tax filing unit is funded by a federal grant that is ending in 1 year with no option for renewal.



Hypothetical Part 3

- The housing unit and the estate planning/substituted decision making unit have each developed their own app that is used by intake paralegals to screen clients and identify their legal issues within that unit's realm of expertise. The housing unit is funded by BELSA's state grant. The estate planning/substituted decision making unit is funded by a private donor.
- For the public assistance clinics, the government agencies administering these benefits all have online applications, but lack of equipment in the public assistance clinic unit prevents them from completing online applications at the clinics. The public assistance clinic is funded by a private donor.



Q & A



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