Erin Riker:

Since it's two o'clock, I am going to go ahead and get started. We have a lot to cover today. Welcome, everyone, and thank you for joining us for Beyond Zoom: Building Long-term Remote Legal Help Programs to Expand Legal Services to Patients and Maximize Efficiency. We are very grateful for all of you to joining us today. I am going to go through a couple of overview items and then turn it over to our presenters. Everyone in the audience is on mute. You should feel free to submit your questions and feedback throughout the presentation using the chat function. We'd love to hear your reactions in real time. We will do our best to address all of the questions at the end of the presentation.

And we are offering CLE credit for this session. The CLE code will be offered at the end of the presentation. You can download the CLE form from the agenda website and make sure to submit it by April 26th in order to get credit. I will be copying and pasting the agenda website into the chat at the end of the program so that you can go there and get the CLE form.

And then I'd like to go ahead and start introducing our presenters. We have Kerlann Flowers, who is the Legal Director of the Hofstra/Northwell Medical Legal Partnership. We have Emily Manning, who is a law student at the Hofstra/Northwell Medical Legal Partnership. We have Jeannie Ortiz-Ortiz who is the Senior Program Manager at Pro Bono Net and myself, I'm moderating the session. My name is Erin Riker and I'm the technology-based legal services attorney at the Center for Elder Law and Justice in Buffalo, New York. For more information on all of our presenters' backgrounds and qualifications, you can go to the agenda website for today's conference. And there are links to each one of our bios on the agenda page.

I'm going to go through a brief session overview. We will start by going through the Hofstra/Northwell Medical Legal Partnership itself, describing it, how it came to be, how it exists today. We will then go through the challenges that were faced transitioning into a remote model for the medical legal partnership. And then Jeannie will talk about some takeaways from the remote legal help technology that was used in order to advance the medical legal partnership for Hofstra and Northwell. Finally, we will have some questions and answers.

And before that I'm going to ask that we launch our first poll so that our presenters can get a little bit of a better feel for people who are in the audience, what your background is with remote technology, and how you feel about the subject in general. So, the poll question should come up on your screen. If you could enter in your answers, that would be great. And then because we want to get a little bit more detail, if you could feel free to just expand on your answers a little bit in the chat. If you prefer traditional legal services or you prefer a mix or you prefer for certain legal types of issues, you can feel free to drop comments about that in the chat saying why you prefer a certain mix of traditional legal services and remote legal services over others. And then we'll be able to get a better idea of the audience members themselves. So, I'm going to leave this up for a few minutes so that you can feel free to answer. Okay. As the responses are coming in, we are seeing an overwhelming favorability towards a mix of traditional and remote legal services with some people saying that they prefer remote legal services for certain types of issues.

And I would love it if people would let us know in the chat why they prefer that mix or which legal services they would prefer for remote versus in person so we can get a better idea of what your background is, and how we can best provide the information that will help you. Cecilia says it's really dependent on what works best for the clients and issues with access to remote services versus people who have children or have transportation issues, remote would be really popular for them. And this is something that we see a lot especially with clients in rural or other underserved communities. Having access to the technology needed for remote services is a big hurdle. That technology gap is in a sense, an access to justice gap. So, I hear you there. And then the mix provides options equitable access, so being more person centered. And again, that's 100% our experience as well in that it really depends on the clients as to what they have access to and what makes the best sense for them.

So, I'm going to leave this open for just another minute or so for some more commentary, and then we will go over into our next section of the presentation. Charlie says that the intakes are better done remotely and there's no reason for these to be done in the office. I completely agree that the same experience is for the client where they can give you the information over the phone. They can give you the information via electronically, and then you can have that same experience as if you're sitting with the person across the table filling out a piece of paper.

And Cecilia brought up that the technology gap is very present in urban areas as well. And that's very, very true. In my experience we serve a lot of people in more rural areas, and so that has been my focus. But the technology gap is present cross-geographically. There are technology gaps that are present based on socioeconomic factors and based on infrastructure factors. There are all kinds of things that can cause the technology gap to occur. And I think that's something that when providing remote legal help programs, we are all very cognizant of. So, the final results of the poll were that no one prefers only traditional legal services. That makes sense because you're all here learning about remote legal services. Most people still prefer a mix of traditional and remote, 73%. 21% said they prefer remote services for certain types, and 4% says that they prefer 100% remote legal services. So that's a really good mix of opinions and beliefs on the legal services. And now I'm going to turn it over to Emily and Kerlann to give an overview of the medical legal partnership with Northwell and Hofstra.

Emily Manning:

Yeah. Hi. So, as she said, I'm Emily of the medical legal partnership. So, to begin, this partnership is first a great example of how healthcare and legal professionals can work together to address the social determinants of health and ultimately improve health outcomes for patients. And as many of us know, a person health is determined not just by their access to medical care, but also by a variety of social and economic factors such as their housing, their access to healthy food, and their ability to afford basic necessities. And MLP aims to address these issues by providing legal assistance to patients who are facing these certain legal issues because they all affect their health.

So, the program pairs medical providers with legal professionals who work together to identify these patients who are in need of assistance and to provide that assistance in a timely and effective manner. And the MLP has a mission to provide legal care to community members across Long Island, in New York City, regardless of their ability to pay. There are three critical areas that the MLP focuses upon, and that's providing legal services to underserved patients, educating current students and future generations of lawyers and healthcare professionals, in class training these medical and legal providers in order for them to gain an understanding of each other's discipline. And also forming relationships with community-based organizations and local law firms to expand the [inaudible 00:09:58-00:10:45]

Erin Riker:

It looks like we're losing Emily's audio.

Technology Moderator:

Emily, could you please try muting yourself and then unmuting yourself?

Emily Manning:

Yes. How about now? Can you hear me? Good. Okay. Sorry about that.

Emily Manning:

Okay. Great. Thank you. Just let me know if that happens again, not sure what's going on, but so I help, I'm not sure if you heard me include income, housing, employment, education, legal status, and then personal and family needs. So, looking at income, the MLP helps patients navigate government benefit programs such as Medicaid, SNAP, WIC, and SSI. We also assist clients with issues pertaining to their health insurance and utilities. And really when assessing our clients, we have to focus on their eligibility of these benefits. That includes things like their immigration status, their household size, and their financial eligibility. And these are usually some of the first questions we ask when meeting with the client.

So, looking at housing, housing focuses on really just ensuring clients have safe and healthy housing. And this can range from eviction issues, foreclosures, repairs, just general issues with landlords. And you also help clients apply for things like the one-shot deal or the family homelessness and eviction prevention supplements. The MLP also assists those who are discriminated against in the workplace, or we help obtain special education for children. And then looking to legal status, the MLP deals with assisting immigrants apply for and obtain different visas and asylum. And this area focuses a lot on some of the barriers that are commonly faced by immigrants in terms of their health. So, looking at language barriers, just general accessibility to public benefits and also discrimination. And then lastly, in this “I-HELP” category, we have personal and family issues that deal with aspects of elder law, mental health, and substance abuse. One thing to note is the different clinics in which the MLP is currently a part of. So, this includes pediatrics, adult medicine, and Health Home, which are Medicaid eligible patients with two or more adverse health diagnoses. Additional clinics are also being constantly added.

So, for example, the kidney transplant clinic usually needs assistance with non-citizen patients because emergency Medicaid doesn't cover transplants. And there's also a lot of post-op kidney transplant care. One of the key strengths of the MLP is its focus on prevention. So, by addressing these legal issues before they really become a full-blown crisis, the program is able to help patients avoid the negative outcomes that often result from these legal problems we discussed such as eviction, loss of income, or just general inability to access healthcare.

A more specific example is this: say a patient is faced with eviction and they're at risk of becoming homeless. And that in turn can lead to a variety of health problems within itself. And this is including exposure to the elements, lack of access to food or medical care, and also increased stress and anxiety in general. And by providing legal assistance to the patient before these become really full-blown problems, we can help them stay in their home, avoid homelessness, and really maintain their health and wellbeing.

A second strength of the partnership is its focus on interprofessional collaboration. So medical and legal professionals really work together to provide a comprehensive approach to patient care addressing both medical and legal issues. And this collaboration is really essential to the success of the program because it allows both these medical and legal professionals to learn from each other and to develop new ways to really improve the patient outcomes.

Hofstra Law also offers a class titled “Law and Medicine Together” where students including myself, are really exposed to the core practice areas of the MLP. So, this course includes the combination of lectures and skills lab each week with its own topic and its own module. And students at the end of the class are required to perform field work with MLP. So, we are all assigned a group of clients. This semester, for example, I've dealt a lot with clients who are having housing issues. For example, I've been helping a tenant through an eviction and another one with just some general issues dealing with their landlord. Other students, some of my classmates, are representing clients in benefit cases, employment disputes, and immigration petitions. And Hofstra also offers a semester-long class after this one where students are solely working with clients as they take on a caseload of their own.

And I see a question, can students take that class during their first year? I believe this is a class mainly for 2L. So, after your 1L classes or core classes, you're able to take this in your 2L year. And then another way the MLP expanded its initiatives is, I know I mentioned previously working with other law firms, so this would be doing pro bono work. And by partnering with other law firms, MLP is really able to extend its reach and provide more patients with the legal assistance they need. So, this partnership provides training and support to these firms so they can become more familiar with the MLP model and also the social determinants of health.

An example of this is the law firm Mintz Levin has pursued a collaboration with the partnership and has semi-recently secured a pretty groundbreaking and impressive decision. So just a bit of background, this client suffered from endometriosis and was denied disability payments, so a request for a hearing before an administrative law judge was submitted by Mintz along with supporting documentation on the client's education, employment history, and medical history. And when the hearing was scheduled, Mintz submitted a brief letter outlining the client's experience with endometriosis and more than 300 pages of medical records. And then at the client's hearing in August 2022, the case was presented, and it focused on convincing the judge that even though endometriosis is not on the SSA disability evaluation under Social Security listing of impairments that is considered severe enough to prevent someone from working, the client's condition really did render her disabled as the SSA defines it. For the month after the team learned that the client had received a fully favorable decision awarding her a disability payment, and remarkably retroactive benefits too, which is great. So, although the case really was an uphill battle due to the lack of knowledge about severe endometriosis, and because obviously the agency didn't categorize this condition as a disability, the judge still found that she had been disabled since the date of her initial application filed in 2021. So again, that's just a really great example of how the MLP can help its clients.

But to wrap this all up, as you look to the future of healthcare, it's really clear that addressing the social determinants of health will be an increasingly important part of healthcare delivery. And MLP provides a promising model for how healthcare and legal professionals can work together to address these issues and ultimately improve health outcomes for patients. So, by combining the expertise of medical and legal professionals, the partnership is really able to provide a more comprehensive approach to patient care, one that is focused mainly on prevention and collaboration and wellbeing, the whole person. And then I think next we have a poll for you guys to answer.

Erin Riker:

Yeah. So, if you could bring up poll question number two. Okay. For this question, how would you describe the current status of your organization's remote legal help projects? Do you already have implemented them as part of your services? Are you considering to implement them as a part of your services or do you not anticipate yet offering this as a part of your services? And we'll leave this up for just another minute to make sure that we capture everyone's responses. And as always, if you want to expand upon your answer, you can feel free to drop something into the chat to do that.

(silence).

Okay. So far, we are pretty heavily favoring organizations that have already implemented this as part of their services. There are some more organizations that are considering this as a part of their services. We're going to keep the poll up for another 10 seconds or so to make sure that we get everyone's responses. So please submit your answers. So right now, we are at 78% who have already implemented remote legal help as part of their organization services. And then we have another 21% who are considering implementing it as a part of their services. So, this is a really great response and it's also really reflective of the importance that having these remote legal help options plays in reaching as many clients as possible and also reaching clients where they are at. And at this point I'm going to turn it over to Kerlann to talk about challenges and transitioning to a remote model.

Kerlann Flowers:

Thank you. So, since we have 78% who have already implemented and 21% who are considering, I probably don't have to go too deep into all the challenges that we face where we had no remote options, but I'm going to do it anyway. So, we did face a lot of challenges and prior to COVID, the MLP was embedded into the clinics, and it was in-person visits. So, essentially the patient would go see their doctor and then if they would mention a health harming legal need for example, Well, I can't take my insulin, I'm going to be homeless soon," the doctor would then walk the patient down to our office that we were given for the day and have them meet with the attorney. Well then COVID happened and that just couldn't happen that way anymore.

Also, before COVID, appointments were made according to the patient's schedule. So, we would try to say when's your next appointment? And the patients would let us know and we would try to work with that so that they could have their appointments at the times where there is insurance provided transportation, but that didn't always match up. It didn't always happen. So, we had a high in-person, no-show rate. And as you can see on the slide, it's due to several things. And I started talking about a little bit more about the transportation. When we were not able to coordinate the times that the attorney needed to see the client again, it became a challenge. It became the patient needing to arrange transportation. Maybe they didn't have a car, or they can't afford an Uber or Lyft or anything like that, or they couldn't arrange for public transportation.

We had a lot of no-shows, and they would call and say, I just don't have a ride and I'm not coming. So, we did find that it was a huge challenge when the patients weren't, they just weren't able to make it because of transportation. Work schedules, appointment times were made during business hours and most of our patients work, and they weren't able to take time off. However, some patients would go ahead and have us make the appointment thinking that perhaps they might be able to take the time off or maybe come quickly. And what would happen is that that just conflicts with everything they've probably scheduled for the day. And it doesn't happen that way. It just never happened that way. Their appointment ended up becoming a no-show. So, we found that when we called to find out, "Hi, are you coming?" They're like, "No, I have to work. I'm not going to be able to make this appointment." So that also led to some of our high in-person no-show rates.

Childcare, so we love kids, and we don't mind the kids coming to the appointments. However, sometimes the parents will come, they'll come to the appointments, and we are embedded in a pediatric clinic, but we found that sometimes the parents are very distracted with the children there and the parents get frustrated with us trying to explain to them what the legal process is and the children may be running around and not giving them a break. So, we found that they would cancel the appointment even during the appointment and say, "I'll come back," or "I'll call. I can't do this right now." During the summer months when patients have their children with them, they just don't have childcare. So, they may make the appointment. They may let us schedule it thinking they're going to bring the children with them. But then we found that on the actual day of the appointment, the patient usually cancels and it's like, "I have my kids with me. I can't come." And then also to arrange transportation with the children becomes a challenge.

Another thing we had was client confusion. A medical legal partnership, it's not something that they're familiar with. So, there was a lot of confusion about why they're meeting their lawyer in a doctor's office and in the same office that they met their doctor. So sometimes we even had patients say they didn't know where they were meeting us, they didn't realize they were coming back to Northwell to the clinic to meet us. Sometimes there was a lot of confusion around when their appointment was or that it was actually on a different day than they're actually seeing the doctor. We did have a lot of that happening.

And then the client fears. Some of the clients were afraid to meet us because they didn't know who they were meeting essentially, and especially for our immigration cases, we would have them come back in and they would not come back because then they didn't want to deal with the issue. They didn't know what they were stepping into. However, we felt that it'd be the best place to meet them because it would be at the doctor's office, which is usually a trusted space. But we did find that some clients would have a lot of fear in coming back to meet us to discuss their immigration issues.

We also found that even if we did have an opportunity to meet with the clients, there was a lot of frustration with technology and their frustration became our frustration. I've been on the phone with clients who've never used email and I'm there trying to explain what the email system is and how to use it or how to use your phone to take a picture, then to email it, attach it, and that becomes my frustration as well. So, I completely understand how they feel.

A lot of our clients do not have computers and they're unable to look up information that you and I may think is a simple thing for them to look up. For example, where's their local social service office, or the local court, where to go, what times the courts are open. So, I might just say something like, “oh, you can just Google that,” and the client's like, “I don't have a computer. I don't know what you're talking about.” We had to understand that some of our clients are limited as far as using a computer.

It's also very difficult if they don't have a scanner. Most times we speak with the client and even if they were in person, they don't usually come with the documents needed. We would meet in person, and we would say, “okay, send us that notice that your landlord sent you or that paper,” because they don't usually know it's a notice. They don't know if it's a petition. They don't know what they received. They said, “I just got a paper from my landlord.” So, you'll say, “okay, do you have the paper?” And they'll say, “no, no, no.” So, we have to figure out how they're going to send us this paper and it could be very time sensitive. Was there a date on it? And they have no idea. If they don't, they get home and they have no access to a scanner, it's very hard for them to send us documents. I would also explain to them how to take a picture and see if they can email that to me. And some people are not able to do that. It's also hard for them to get forms. Sometimes I need them to fill out a form and I'm like, “okay, I can email that to you.” If they don't have email, they're not able to receive it.

Email is a very -- and I teach the students and my students are not able to be on the phone all the time -- so email is very easy. It's a lot easier for them to communicate with the clients through email. However, if the client does not have email, then it really does take up a little bit more of my students' time. So, the quick communication through email is a little difficult. When my attorneys or my students have documents to send to the clients, also, there's a lot, there's no email. There's no ability to quickly send these documents to the clients. So, we find ourselves FedExing and mailing a lot of documents to the clients. And when we were in person, we could definitely just hand these documents to the clients, but the students weren't always able to go back to the clinic because, you know, they're students and they do have class.

So, we found that even though our clients have to go to a local commercial center like Staples, or a library, therein lies another set of problems. Do they have transportation to get there? Do they have the time to get there? And a lot of my clients say they don't trust technology. They just don't trust it. They don't want to bring their, and I understand, they don't want to bring their personal documents to Staples or to the library and start scanning them and emailing them from that computer. So, a lot of our clients distrust the technology.

Okay. I'm just making sure I'm not running out of time.

Then we have program obstacles. We have to make sure that there's HIPAA approved storage of the client files. Now I have a lot of clients that email me documents, which is fine because then I can just shift them over to the program. But I have students that I teach every semester, and if clients are emailing my students, I find myself sometimes trying to contact students while they're studying for the bar or while they are in their new legal position to track down documents that clients said that they already sent to my students. So, I find that to be a very difficult thing keeping track of documents that way and also leaving documents on students' email servers and then they leave, the program is really not HIPAA compliant. Also, when my students do leave the program or pro bono attorneys leave the program, I need to be able to have a smooth transition between attorneys and between attorneys handling the file and the client. So, it's really difficult for me to keep saying, please send that again, please do that again. It frustrates the client and that's not what we're here for.

Okay. I'm going to quickly go through my implementation challenges. So, because of all these challenges, we felt that we needed to have something to bridge the gap and we needed to choose a program which addressed all these challenges. I needed to have a program where my client did not need a computer, where my no-show rates go down to almost zero, where storing files is not a problem. The next advocate can pick up where the other advocate left off. And when I was looking for a program, those are the things that I was looking for. Also, I had to make sure that I was able to get a buy-in from the law school and Northwell Health. Those are two different legal entities and I had to convince each side, and it took months, but I had to convince each set of entity that this is what we needed.

And I had to go through all why we have these challenges and how a system, new system would be able to help us bridge the gap and improve client health. But then for myself and my students and my secretary, we were afraid because how are we going to maintain dual systems? Right now, we have the time management system, Clio, but my clients can't get into Clio, and I don't like to give access to students who are just taking one semester of my course, Clio. I don't like to give them access to Clio if it's not necessary. So, I was afraid, how are we going to maintain dual systems? Are we going to be doing double work? What information would go into what system? So, these are all things that were challenges to me when we were thinking and brainstorming on what we should do to bridge the gap for our clients. Okay. I think that's my time.

Erin Riker:

Thank you so much, Kerlann. I'm going to ask the third poll question to come up now. For this question, remote legal services offer great potential for expanding access to justice. And if your organization is on board with remote legal health projects, hopefully all of you are, that's why you're here, what roadblocks are you facing? And you should select all that apply. Choosing the right technology, staffing a remote legal health project, training, and supporting staff and volunteers, communicating with clients who have limited access to technology, and costs associated with maintaining technology, or other. And we'd love it if you would expand on those in the chat if you select other for your answer.

(silence).

Since this poll question is a little bit longer, I'm going to leave it open for just another minute to let everyone get their answers in.

(silence).

Okay. So far, our answers are pretty well spread out. The two most popular roadblocks are training and supporting staff and volunteers to adopt the technology and communicating with clients who have limited access to technology. And that one's really important because as we discussed, the digital divide is everywhere, and it does create an access to justice divide as well. The next most common is choosing the right technology or tool for our organization. As Kerlann said, that is critical but also requires a whole lot of buy-in from different agencies. It requires a lot of different research and then also staffing of a remote legal help project.

And that's key as well, because the best laid plans will not be nearly as effective if they don't have enough people to staff them. And then finally, the cost associated with maintaining the technology, funding is a challenge for all of our organizations. We're all chasing after the same pots of money and increasingly fewer pots of money. Finding that money to support these systems is definitely an issue. I'm really glad that everybody took the time to interact with us and to provide their feedback on that poll. And now I'm going to turn it over to Jeannie, who is going to talk about the technical aspects and takeaways from the remote legal help technology through pro bono net.

Jeannie Ortiz-Ortiz:

Thank you, Erin, you've all heard about the medical legal partnership program at Hofstra and the challenges that they faced. I'll first talk about what we do at Pro Bono Net. I'll go over how we came to develop Remote Legal Connect, which is the platform that Hofstra decided to use to expand remote legal services to its patients and clients; some of the functionalities of the platform that address the challenges that Kerlann just outlined; our work with Hofstra; and then if we have time, we also have a short video demonstration of the case document features.

So, for those not familiar with Pro Bono Net, we are a nonprofit organization. We're based in New York City, but our work spans across the country. We partner with legal aid organizations, courts, and pro bono programs to improve the way that people access legal information and the way they connect with volunteer attorneys. And we do this through technology and innovation. We support many initiatives through our core technology programs. And those initiatives are designed to primarily help low to middle income families access free and plain language legal rights information; digital tools to support self-advocacy in courts and federal agencies such as our LawHelp Interactive program; and our partnership-based initiatives also help to build online networks and the capacity of attorneys and advocates providing free legal assistance or help to individuals, for example, through CLE training.

So, one of our core programs is Remote Legal Connect, which Kerlann mentioned briefly at the beginning. And before there was a tool to facilitate remote legal help projects, we worked closely with our partners and legal aid organizations to identify the needs of different types of participants involved in remote legal help initiatives. And these were some of the needs that we identified in that process. Developing a remote legal help tool presented several opportunities and requirements like the need for document management, which Kerlann alluded to, to enable easy sharing and storage of case documents for different types of users, so legal aid staff or law school staff, pro bono attorneys, and then clients. Another need was to facilitate secure and virtual consultations to promote client and attorney interactions, especially for clients with mobile phones. And at the end of the slides, we've included some resources and guides with findings from two remote legal services surveys that our team conducted with organizations across the country that are really consistent with this list, and we did those studies before the pandemic and during the pandemic.

Okay. So as a nonprofit, our goal for the past 24 years has been to address technology gaps in the market. And we collaborate on solutions with our partners to fill these unmet needs. And the solutions that we design, including this Remote Legal Connect program, are really primarily driven by what our partners communicate to us. So, in 2015, that was almost 10 years ago, we worked with the Legal Aid Society of Northeastern New York to develop the very first version of Remote Legal Connect, which was funded through the Legal Services Corporation's Pro Bono Innovation Fund. And the goal for their program was to develop, pilot, train, and evaluate a virtual law platform to increase pro bono service delivery in housing and consumer cases in rural upstate New York.

And they wanted to do that through the use of remote assistance technology and client collaboration tools by also including real-time video sessions and then giving attorneys the opportunity to remotely review and edit pro se pleadings so that the client could file those with the court. The result was the development of this platform, which at that time was called Closing the Gap, and it's still the name of the project of the Legal Aid Society of Northeastern New York. But ever since other organizations in New York, Georgia, Ohio, Alabama, and Nebraska have adopted the tool, the platform was officially launched as Remote Legal Connect. So, it has evolved over the past eight years.

When we met with Hofstra for the first time, they were looking for something that would address the challenges that Emily and Kerlann talked about. So, what does it do? What does Remote Legal Connect do? And why does it help with client engagement? You can think about it as a Zoom for pro bono programs, but with light case management functionality. It's a web-based platform. It's managed by an organization or a program like Hofstra's Medical Legal Partnership Program. And it enables a program to do pro bono case management. Users can share documents with each other and then they can have a video or a phone call at the same time for the purpose of providing legal advice, the attorney and the client. And that's why we named the session Beyond Zoom because more than a generic video tool, this platform was specifically designed to enable organizations to do that remote assignment and also really facilitate.

I think the biggest thing is to facilitate that document, those documents between the clients, the attorneys, and then the staff at the organization. In addition to that, organizations can also configure settings on the site such as editing email and text message notifications that clients and attorneys automatically receive. They can also change site colors, logos, images, and add content for different types of users so that those users can access know your rights resources, forms, and training materials when they log in. So, this is a screenshot of the client case summary from an administrator's perspective. So, this is for example, something that Emily or Kerlann would see on their end, and that person can assign a client to an attorney so the attorney can review case notes and documents uploaded by the pro bono team or the client in advance of a meeting. And if you look also at the top right of the screenshot, you'll see a button that says email case info.

One of our partners was using Legal Server, a case management system, and they needed a way to export client files and case notes from Remote Legal Connect to a case in Legal Server. We were able to develop this email case info feature that sends an email with the client's files and Remote Legal Connect as attachments to a third-party email address. So that helps avoid duplicate data entry from those systems. And some of the organizations that we speak with who are looking for remote legal help technology solutions often tell us we're using too many tools for our remote legal help project, which is understandable. For example, we're using Zoom for video meetings with clients. We're using Google or Dropbox to share resources with attorneys. We're using email to share case documents. So, what we offer through this program is I think a seamless solution that helps streamline document management, case assignment meetings, and storage for training materials, all of it in one centralized location, therefore hopefully maximizing productivity and efficiency for programs managing pro bono cases.

And then we've also talked about clients having mobile phones or having limited internet connection. And we definitely understand that that's a significant challenge for many people. And we have the data to prove that. I included here a metric from a study that was recently released. And so one of the things that we offer, whether clients prefer face-to-face meetings through the video conferencing module of the platform or phone calls, those are two options for the client and attorney to choose. We're currently piloting the computer phone option that's integrated with a third-party communication system so that pro bono attorneys can call their clients' mobile phones directly from the platform. I personally think this will be a game changer, especially for clients that only have phones or prefer to talk over the phone instead of using a platform. So, these two options, video chat and phone calls, allow attorneys to keep their personal or office phone numbers private while managing client files, entering notes, and completing their pro bono cases.

I know I have a few minutes left or I'm at time, but I'll try to wrap this up. So, with Hofstra, Kerlann talked about clients' lack of access to a computer, a scanner, or an email. With Remote Legal Connect, having an email is actually not a requirement for the client. So Kerlann can add a client to the platform just with their mobile phone number. And once clients are added, they'll receive a notification via text or email letting them know that they can log into the website and upload documents. And also, that computer phone screenshot that you saw earlier, the client doesn't have to even have an account, that the attorney can just call the client if needed directly to the client from the platform. And then because law students may not see the end of a client matter before graduating, the case notes can help someone like Kerlann make sure that client cases are duly updated so that the next group of law students can log in and not miss any important information.

I think I'm going to maybe skip this or leave this for you all to access the slides, but this is a four phase approach that we follow to help streamline the onboarding process to this new system. So, we spent a few hours understanding Hofstra's workflows, outlining the processes that had to change from in-person to remote, and then we worked with Kerlann and her law students to populate the platform with client resources and forms to ensure that everything clients and attorneys needed was accessible upon logging in. And then after that, we facilitated trainings to law students and staff members at Hofstra to provide an overview of the remote legal partnership program, go through questions, and revisit any workflows that we had outlined.

Okay. Just a few takeaways that I've already discussed and then I'll stop with this one. Here's a snapshot from last year to highlight how clients and pro bono attorneys use Remote Legal Connect. So, these numbers reflect only cases from organizations in New York. So last year, approximately 600 new clients used Remote Legal Connect in New York with half of them taking advantage of their video chat tool for virtual consultations. And then virtually all 600 new clients and 500 pro bono attorneys utilize the document sharing feature to manage and facilitate case documents.

So this tells us that having the option for video consultations is important, even though not everyone uses it and for people not using it, they might still resort to a traditional phone call or the computer phone, which I think is totally fine, but to me it also confirms that clients, attorneys, and legal aid organizations are widely utilizing the document management functionality to upload case documents and complete petitions after consultations making I think the whole process easier and pro bono cases easier to collaborate on. Okay. And I think, Kerlann, you wanted to speak to this a little bit as well.

Kerlann Flowers:

Well, this was just, I think I mentioned it a little bit, I think this is, it increased our client participation where we eliminated the no-shows. They were able to upload documents. It's a seamless transition and then they have access to forms that we need them to review. So that's just what it did. So, Erin, you want to take it back?

Erin Riker:

Thank you, everyone, and thank you so much to all of our audience members for attending, for participating in the polls, and for leaving your comments. I think that our presenters did an amazing job in letting you know how this program works and how it can be maybe replicated in your own agencies. I do want to... Thank you all very much for being here, and we appreciate your time and your attention.

Jeannie Ortiz-Ortiz:

Thank you.

Kerlann Flowers:

Thank you.

Emily Manning:

Thanks.