

Beyond Zoom: Building Long-Term Remote Legal Help Programs to Expand Legal Services to Patients & Maximize Efficiency

2023 New York State Civil Legal Aid Technology Conference

Wednesday, April 19, 2023

2:00 pm - 2:50 pm Eastern Time

PRESENTERS



- **Kerlann L. Flowers, Esq.**, Legal Director, Hofstra/Northwell Medical Legal Partnership



- **Emily Manning**, Law Student, Hofstra/Northwell Medical Legal Partnership



- **Jeanne Ortiz-Ortiz, Esq.**, Senior Program Manager, Pro Bono Net



- **Erin Riker, Esq.**, Technology-Based Legal Services Attorney, Center for Elder Law & Justice (*moderator*)

Session Overview

1.

The Hofstra|Northwell
Medical-Legal
Partnership Program

2.

Challenges and
Transitioning to a
Remote Model

3.

Takeaways from remote
legal help technology

4.

Questions & Answers/
Discussion



**We would love to
hear your thoughts
and feedback.**



**Please use the chat function to submit your questions
or comments.**

Poll Question #1

Tell us about your selection in the chat.



A Medical-Legal Partnership between Northwell Health and Hofstra School of Law

Our Common MLP Mission:

We seek to deliver holistic care to underserved patients in our community by uniting social, medical, legal and academic resources

Our Shared Community

Both Northwell & Hofstra Law have a long history of providing much-needed legal and medical care to community members across Long Island (and New York City) regardless of the ability to pay.

Active sites:

- 865 Northern Boulevard
- 410 Lakeville Road
- MSGO 265-11 Union Turnpike
- Health Home
- ED – Long Island Jewish Medical Center – New Hyde Park

Our Medical-Legal Partnership

- Healthcare delivery model that embeds lawyers into care settings to identify and address health harming legal needs
- Health-harming legal needs we address (I-HELP):



INCOME:
Public Benefits
WIC
SNAP
Social Security
Health Insurance
Utilities



EMPLOYMENT:
Employment Discrimination

EDUCATION:
Special Education for Children



PERSONAL/FAMILY:
Elder Law
Mental Health
Substance Abuse



HOUSING:
Evictions
Foreclosures
Repairs



LEGAL STATUS:
Legal Permanent Residents
Refugees, Asylees, Grantees of
Withholding of Deport
"T" Visas
Battered Spouses
Parolees
Derivative Beneficiaries

**Poll
Question
#2**

Hofstra|Northwell MLP CHALLENGES

High in-person no show rate:

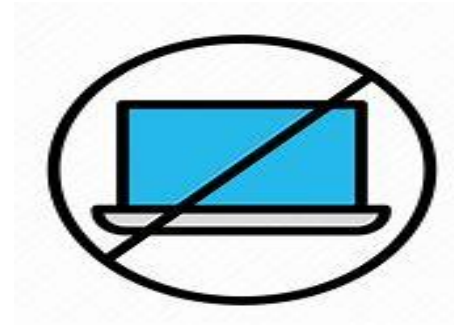
- Transportation
- Work schedules
- Child care
- Client confusion
- Client fear

Client frustration with technology:

- No computer
- No access to scanner
- No email

Program Obstacles:

- HIPAA approved storage of client files
- Granting client file access to Pro Bono attorneys and students



MLP Implementation Challenges

- Choosing a program which addresses a majority of the challenges the MLP was facing
- Buy-in from Law School and Northwell Health
- Maintaining dual systems

Poll Question #3

Tell us about your selection in the chat.



ABOUT PRO BONO NET

Pro Bono Net is a national nonprofit based in NYC. Our mission is to bring the power of the law to all by building cutting-edge digital tools and mobilizing justice networks.

probono.net
bringing the power of the law to all

Our Programs

Pro Bono Net's programs:

- Help individuals access, understand, and exercise their legal rights
- Make it easier for legal advocates to do the most good
- Support national and regional efforts to expand access to justice

Our programs serve over 10 million people a year. Justice partners in 24 states rely on us for statewide portals, and national programs like LawHelp Interactive enable self help by litigants in more than 40 states & U.S. territories.



LawHelp.org

JUSTICIALAB

probonoMANAGER



Legal Risk Detector

I. Understanding the Needs

Organizations

- Ability for multiple staff members to manage program
- Features to facilitate document storage and sharing
- Ability to seamlessly manage lists of clients and volunteer advocates
- Ability to manage and curate content for users

Volunteer Advocates

- Access case documents uploaded by the client or the organization without having to email the documents
- Ability to meet with client and discuss case strategy
- Ability to communicate with the organization during a consultation with the client

Clients

- Mobile-friendly technology
- Ability to take pictures of documents and upload them to platform
- Ability to meet with volunteer advocate (e.g., pro bono attorney)
- Ability to access documents uploaded by organization and advocate



The development of our tools is informed and driven by our partnerships with nonprofit legal aid organizations, courts, and pro bono programs.



**REMOTE LEGAL
CONNECT**

Our Partners



II. Developing our Solution

Remote Legal Connect to:

- Facilitate document storage and sharing
- Connect clients with volunteer advocates
- Promote client participation and collaboration with their attorney

The screenshot displays a web application interface for a Medical Legal Partnership. At the top, logos for Hofstra University and Northwell Health are visible. A navigation bar includes links for 'About Us', 'FAQs', 'Contact Us', and 'Sign In'. A prominent blue banner reads 'MEDICAL LEGAL PARTNERSHIP'. The main content area shows a client profile for 'CARLA CLIENT' with a profile picture and buttons for 'Run Internet Speed' and 'Edit Client Profile'. Below this, there are input fields for 'Current Address' (123, Ave., NY, 10001), 'County', 'Email Address' (eltonjohn@test.com), and 'Mobile Phone Number'. A 'CLIENT DOCUMENTS' table is overlaid, listing files with columns for 'Filename', 'File Type', 'Uploaded By', 'Date Uploaded', and 'Action'. The table contains four rows of PDF documents. At the bottom, a case entry is shown with columns for 'Open Date', 'Case Title', and 'Advocate'. The case entry shows an open date of 08/11/2022, a case title of 'CASE- CARLA CLIENT', and an advocate named Kerlann Flowers Hofstra Test. A 'DELETE CLIENT' button is located at the bottom right.

| Filename | File Type | Uploaded By | Date Uploaded | Action |
|--|-----------|----------------|---------------|--------|
| Motion to file | Docs | Kanchana Hedge | 06/27/2022 | Delete |
| Personal Information Form For Child Support And Paternity Proce... | PDF | Client | 06/03/2020 | Delete |
| Petition - Addendum To Request Child Support | PDF | Client | 06/03/2020 | Delete |
| Petition For Child Support | PDF | Client | 06/03/2020 | Delete |
| Summons | PDF | Client | 06/03/2020 | Delete |

| Open Date | Case Title | Advocate |
|------------|--------------------|---------------------------------|
| 08/11/2022 | CASE- CARLA CLIENT | Kerlann Flowers Hofstra Test |

CARLA CLIENT

Run Internet Speed
Case Files
Email Case Info
Previous VC sessions

CASE TITLE: Case- Carla Client

Current Address: 123, Ave., NY, 10001
County:

Email Address: eltonjohn@test.com
Mobile Phone Number:
None
Case Status: Open

Case Notes (Hidden from Client):
Carla's complaint has already been filed with the court.
Last updated: Hofstra Test (3/28/2023) [Edit note](#)

Notes to Client (Visible to Client):
Hi Carla, it was great to meet with you yesterday. Please refer to the resources page on this site if you have any other questions about family court proceedings. If you would like to request another consultation through our program, please reach out to Kerlann Flowers at 123-45-6789.
Last updated: Hofstra Test (3/28/2023) [Edit note](#)

Assigned Advocate **VC Access**

| | | |
|-----------------|-------------------------------------|--|
| Kerlann Flowers | <input type="checkbox"/> | |
| Hofstra Test | <input checked="" type="checkbox"/> | |

Unassigned

CLOSE CASE

Making document storage and sharing easier for organizations, advocates, and clients. Clients can also upload files and images from their mobile devices.

Exporting client information and files via email.

Managing communication with assigned advocates and with the client.



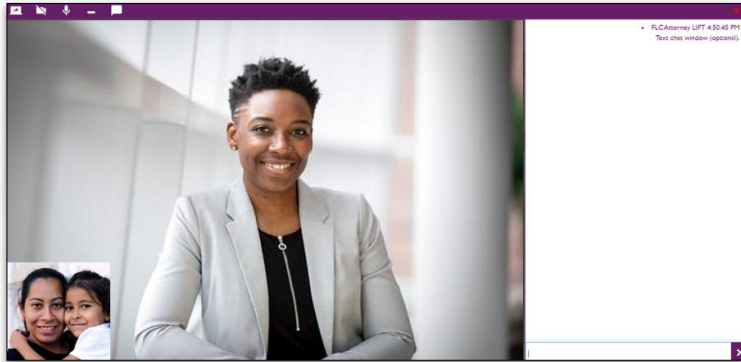


40%

Percentage of New York City households that lack the combination of home and mobile broadband, including 18% of residents – more than 1.5 million people – who lack both. [Study](#) by the New York City Mayor's Office of the Chief Technology Officer (2020).

Communicating with Clients

Video Chat



Computer Phone

Please enter the client's phone number, select the caller ID the client will see, and click "Make the Call."

You can add other people to the call, including yourself if you wish to use your phone.

Client #

Caller #

Enter the phone number(s) of other people invited to the call(optional):

 **Make the Call**

Examples of Challenges and Solutions for Hofstra's MLP

| Challenge | Solution with Remote Legal Connect |
|--|--|
| Keeping track of client documents after they're sent to attorneys | <ul style="list-style-type: none">• Ability for Hofstra to store and organize important client documents• Giving document access to clients and attorneys |
| Following up with client or closing a case once law students graduates | <ul style="list-style-type: none">• Hofstra can assign cases to law students• Require students to upload final documentation and notes to the platform before they graduate |

Transitioning to a Remote Medical-Legal Partnership Program

1



Determining the Need for Remote

- How does the in-person MLP program work?
- What in-person processes need to change to remote?

2



Preparing the Website Content

- What content and documents will clients, attorneys, and law students need to access?

3



Training Primary Users

- Do the remote workflows make sense?
- Is there anything we need to change?

4



Field Testing / Soft Launch

- What needs to happen to adopt the new remote program?
- Are there any challenges we need to overcome?

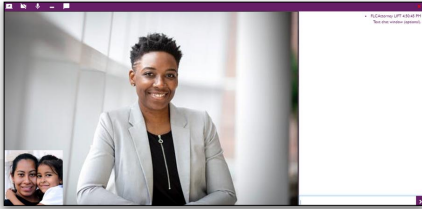
III. Learning & Improving for the Future

4

Takeaways From Our Work With Partners

- Minimizing the number of technology tools for a remote legal help project **increases efficiency** and provides for a **better volunteer and client experience**.
- Focus on **developing and fine-tuning processes that are easy** for clients and volunteers to follow.
- Monitor and evaluate progress by **collecting feedback** from people who participate in the remote legal help project.
- Developing and sustaining remote legal help projects can be challenging. **Connect with others** to exchange ideas, share strategies for success, and avoid common pitfalls.

WHAT DO THE NUMBERS TELL US?



350+

Virtual consultations
between clients and pro
bono advocates

| File Name | File Type | Uploaded By | Date Uploaded | Action |
|---|-----------|----------------|---------------|--------|
| Motion To File | Docx | Kanchana Hedge | 06/27/2020 | Delete |
| Personal Information Form For Child Support And Paternity Proces... | Jpg | Client | 06/03/2020 | Delete |
| Petition - Addendum To Request Child Support | Jpg | Client | 06/03/2020 | Delete |
| Petition For Child Support | Jpg | Client | 06/03/2020 | Delete |
| Summons | Jpg | Client | 06/03/2020 | Delete |

1,000+

Client files uploaded for
access by organization,
advocates, and their clients



INCREASED CLIENT PARTICIPATION

- Eliminated client no shows
- Client uses mobile phone to upload documents to file
- Client files no longer on several email servers
- Client meetings can be done virtually without extra technology
- Seamless transition of client file between advocates
- Client has access to forms and documents to review

Landlord/Tenant Case

Mr. Phillips was referred to the Hofstra|Northwell MLP because he said he was in the process of being evicted.

MLP advocate contacted Mr. Phillips to evaluate the stage of eviction.

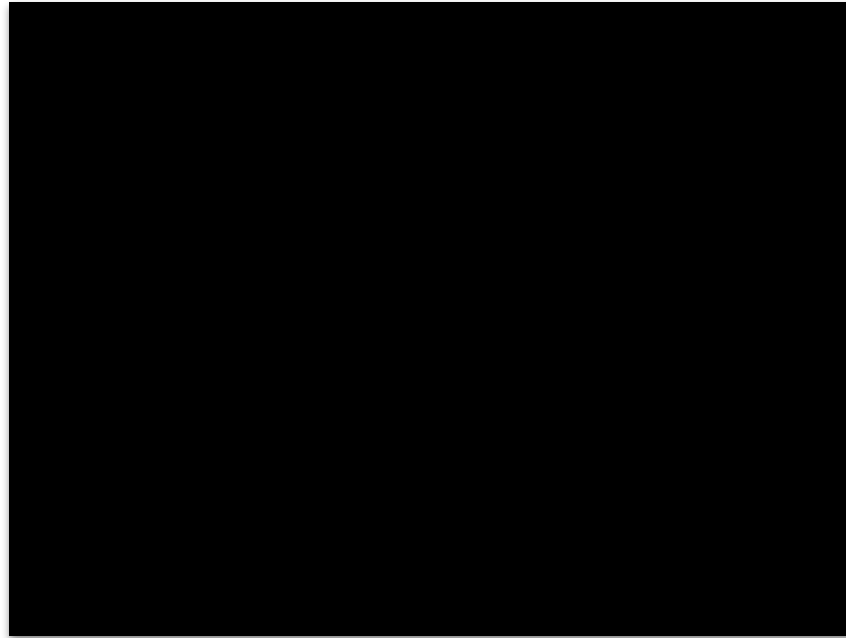
Mr. Phillips indicated that he has several documents he received and he does not know what they mean.

Advocate needs Mr. Phillips to send the documents to the MLP for review.

Mr. Phillips does not have a computer, but can use his phone to take pictures of the documents he received and upload them to his Remote Legal Connect file.

The advocate receives notification that Mr. Phillips uploaded the documents, was able to review the documents and advise Mr. Phillips of his rights and next steps.

Brief video from the Advocate's Perspective (Client Page & Docs)



Additional Resources

- [The Maurice A. Deane School of Law at Hofstra University to Launch Remote Medical-Legal Services Program Using Pro Bono Net's Remote Legal Connect](#) (September 2022)
- [Technology, Pro Bono, & COVID-19: Five Takeaways from Remote Legal Help During the Pandemic](#), Law Practice Today Pro Bono Issue (November 2021)
- [Remote Legal Support: A Guide to Nonprofit and Innovation](#), Immigration Advocates Network, Pro Bono Net (March 2020)
- [Remote Legal Support Guide \(2022 Edition\)](#), Immigration Advocates Network, Pro Bono Net
- [New York Courts' Response to the Pandemic: Observations, Perspectives, and Recommendations](#) by the Commission to Reimagine the Future of New York's Courts (2023)
- [Comprehensive Guide to Remote Citizenship Services: Lessons from the New Americans Campaign Virtual Review Pilot](#), New Americans Campaign



Closing Remarks / Q&A



Please use the chat function to submit your questions.



Thank You for Joining Us Today

Please see our contact information below for questions, comments, or feedback:

- **Kerlann L. Flowers** | Kerlann.L.Flowers@hofstra.edu
- **Emily Manning** | emanning1@pride.hofstra.edu
- **Jeanne Ortiz-Ortiz** | jortiz@probono.net
- **Erin Riker** | eriker@elderjusticenyc.org