



Legal Issue Spotting

You are in a great position to help screen seniors for referral to legal services!

- f* Your seniors know and trust you
- f* You have a broad understanding of how legal and related problems impact your seniors
- f* You can see objectively what your seniors may be in denial about
- f* You know how to help your seniors effectively connect with helping resources
- f* Your holistic viewpoint allows you to see the big picture and how legal problems are part of larger complex problems

Skills and knowledge that will help you successfully spot legal issues for effective referral:

- f* Learn to identify underlying legal issues
- f* Learn to distinguish between different types of legal issues, different areas of law
- f* Learn to distinguish between legal information and legal advice
- f* Learn to distinguish between client's perception of urgency and actual legal urgency (ie. time limits, procedural deadlines)

A few things you can do to help your senior clients get legal assistance more efficiently and effectively:

- f* Help client locate, gather, and organize relevant documents
- f* Help clients get contact information for adverse parties (name, address, phone number of the person/entity on the other side)
- f* Be careful to identify who is the client, and avoid referring third parties to legal assistance (ie. adult child of senior)
- f* Help client follow through on the obvious potential solutions (ie. ask for appeal before time is up, follow instructions to dispute a bill)
- f* Identify particular barriers to client's access to legal services (ie. hearing deficit may require assistance to communicate by phone)
- f* Don't cry wolf, but do intervene with legal services on behalf of client in legal emergency
- f* Help client understand what to reasonably expect from legal assistance (ie. how our process works, our limitations and priorities)
- f* Share legal information, don't give legal advice