Title:

Beyond The Hotline: Expanding Through Live Chat And Pro Bono

Presenters:

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Many legal service organizations provide legal information and referrals through hotlines staffed internally. This panel will invite providers to consider expanding hotline-type services through live chat programs that don't unduly tax staff, take advantage of pro bono, and reach community members where they increasingly seek out information - online.
Beyond The Hotline: Expanding Through Live Chat And Pro Bono

Eve Ricaurte Slides
How Does Live Help Work?

• Live Help is project to allow website visitors to ask questions while browsing on a participating website.

• Visitors to ask remotely-located web specialists for help finding online legal information and resources, including intake.

• The chat software provides a wealth of real-time information about the website visits.
Project History and Overview

• In 2004 Montana Legal Services Association (MLSA), Iowa Legal Aid (ILA), and Pro Bono Net (PBN) received an LSC Technology Initiative Grant (LSC TIG) to support the LiveHelp Pilot Project, which would allow MontanaLawHelp.org and IowaLegalAid.org Web site visitors to ask remotely-located Web Site Specialists for help finding online legal information and resources.
Expanded use

• MLSA, ILA, PBN, the Georgia Legal Services Program and its State Bar of Georgia Pro Bono Project, received 2006 TIG funding in order to support a focused expansion of the LiveHelp initiative in three areas:
  1) use LiveHelp to support and expand pro bono participation in Georgia;
  2) integrate LiveHelp further with document assembly in Montana; and
  3) test a cross-jurisdictional approach to delivering LiveHelp assistance that builds a national network to help clients in times of crisis.
Change in Chat Software

• Live Person was ending the group subscription used by several states.
• The options in 2005 no longer existed in 2016.
• Chat program pricing varies, based per chat or per the number of operator ‘seats’
• Posted prices can change from month to month.
• Chat programs vary in other ways as well.
• With another TIG Grant, Iowa Legal Aid and Pro Bono Net tested other chat platforms.
Software Options

• Live Chat, Inc
  • Less expensive, less robust
  • Easy and fun to use, great customer support

• Comm100
  • Comparable to Live Person
  • Better customer support than Live Person

• Live Person
  • Robust and secure
  • More complex
Iowa Legal Aid’s use of Live Help

• Iowa Legal Aid uses attorneys, or highly trained AmeriCorps members to staff our Live Help project.

• Our goal in Live Help is to direct the website visitor other appropriate websites, or suggest they apply for Iowa Legal Aid services.

• We send links to the Iowa Courts self-help forms, agency online application pages, websites for other states, or countries.

• We do not give legal advice on Live Help. We direct the visitor.

• Experienced staff who know our intake criteria can ask questions to determine if they should apply with Iowa Legal Aid or need to be referred to the Iowa Find a Lawyer program.
Types of Chats

• Visitors chat while on hold waiting to apply – we can let them know how long the wait is, if there is a reason for the delay

• Visitors with a deadline, a hearing the next day – we can screen to see if it is something we take, alert staff of the urgency, or tell them to ask for a court appointed attorney

• How to volunteer at Iowa Legal Aid – we send their contact information to the right person

• How to order brochures from Iowa Legal Aid – we pass on their information to the person who handles that

• The visitor identifies a broken link - we can fix that in real time
Agency Chats

• Often these come in as “What do I tell my clients who have this issue?”

• We ask them to have those clients apply with us

• We can help them send a referral using the online intake

• We can explain what types of cases we take or can’t take

• We also use this as an opportunity to see if Iowa Legal Aid staff can do outreach and talk to them.
Other benefits

• The Iowa Legal Aid article *How to Make Changes to Your Child's Iowa Birth Certificate* is a hit world wide.

• We have had chats about this from India, Australia, England and Ireland. Adding *Iowa* to the title only slowed the flow somewhat.

• We added a canned chat
The titles of our Spanish articles have shown up in search results in all Spanish-speaking countries.
Tour of Live Chat, Inc

- Live Chat, Inc
Beyond the Hotline
LiveChat Project

2018 Training
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What is LAWO’s LiveChat Project?

- Pro Bono attorneys assist LAWO in providing “chat-based” counsel and advice to eligible low-income clients via web-based LiveEngage technology called LivePerson.

- We started our program officially in March of 2014 and have been working to grow it since then.

- Our current project is an in-house project through our Pro Bono Program within LAWO.

- Our project is staffed by private attorneys whom volunteer for our project.

- Our project is supervised by our Pro Bono Director and one staff paralegal with a little administrative support.
What is LAWO’s LiveChat Project continued...

- Our project covers our specific 32 county area in Ohio, but is focused on our more rural counties.

- Our goal was to use some of our volunteer attorneys in our more urban areas to help assist our clients in more rural areas.

- The LiveChat Project offers a unique opportunity for attorneys to expand their potential for volunteer work without a large time commitment.

- This project leverages existing online communication tools and matches low income person with pro bono attorneys based on availability and expertise.

- LiveChat offers pro bono attorneys a flexible and brief time-limited volunteer opportunity.
So how does this all work?

- We use an intake system called Legal Aid Line, which is the same intake system used for all of LAWO, to screen individuals for eligibility.
Service Delivery Model

Legal Aid Line screens for Applicant Eligibility

- Assigned to ABLE or LAWO Staff
- Assigned to Pro Bono

- Full Case Placement
- Self Help Clinic
- LiveChat Project
What happens once a client is scheduled for the LiveChat Project?

- Volunteer or pro bono attorneys have already provided our LAWO paralegal with their availability to take chats and give counsel and advice. (weekly, monthly or quarterly)

- The Intake Specialists at Legal Aid Line have a calendar already provided to them of when volunteer attorneys are available for chats and then schedule eligible clients into the first available time slot.

- The Intake Specialists then send an email to our volunteer attorneys that their appointment slot has been filled.
How are the volunteer attorneys trained?

- We can do in-person trainings, but prefer to do the trainings through a Zoom meeting that we developed, so they can do it right from their work computers whenever is convenient for them.

- The volunteer attorneys get limited access to our case management system, PIKA, for the cases they take.
Pika Case Management System Access

https://pika.ablelaw.org/ablelawo/

Username: jdoe-pai
Password: Pass123
Case Number: LAW-14-29743

Summary (public):

Notes (private):

1 About Homeless

The summary will tell you when you will have to appear in Court. The Complaint will tell you why your landlord thinks you are entitled to the return of possession of the premises. The Complaint may also tell you if the landlord is also suing you for money.

If you disagree with the "3 Day Notice to Leave" and do not move, the landlord may then file an eviction action. If you have not already done so, talk with your landlord.

Having an eviction on your record may make it harder to find housing in the future. You may be able to work out an agreement by talking to your landlord. It is best to get any agreement in writing. It should say that if you do your part the landlord will not file an eviction. Some examples might be that you will move out or pay your late rent by a specific date.
How does the client connect with the volunteer attorney?

- The client has been told to register for their LiveChat appointment at www.legalaidline.org, which is our LAWO website and there is a link there.
- They are told to wait for 15 minutes in case the attorney is running behind.
- They cannot finalize the login process until the attorney is signed on to LivePerson on their side.
- They are also instructed to refresh their page every 2 minutes in case the attorney logs in after they do.
Client Access to a LiveChat Appointment

http://legalaidline.lawolaw.org/chat/

Welcome to LiveChat. Our free online chat program is available to eligible low-income residents in 32 counties of northwest and west Central Ohio who:

✔ Have completed an application for legal help, by telephone, online, or in person;
✔ Met our income guidelines;
✔ Have access to the internet;
✔ Have been prescreened.

If you have a pre-scheduled appointment to chat with an attorney, click on the ‘Sign in Here’ button in the ‘Already Scheduled to Chat with an Attorney’ box below.

If the ‘Sign in Here’ button does not appear it means the attorney may not be in the chat session yet. The attorney may log in up to 15 minutes late if they are finishing another client appointment. If the ‘Sign in Here’ button does not appear, refresh your screen every two minutes until it appears. If you are using Internet Explorer and you are unable to log in, try using Google Chrome as your internet browser.

Once you are able to click the ‘Sign in Here’ button a new window will open asking for your first and last name, your case number and your e-mail address. Your case number was provided to you by email. Once you enter your information, click the ‘Begin Chat’ button.

Already Scheduled to Chat with an Attorney?

NOTE: You must have a pre-scheduled appointment to chat with an attorney. If you need to apply for help, select either the “Online Access to Legal Aid Line” button or “Contact Legal Aid Line by Phone” button above.
Here is what the client sees when they log on to chat.
The volunteer attorney uses LivePerson on their end to chat with the client.

- The volunteer attorney can access LivePerson, LAWO’s software platform, now all online through the web.
- Volunteers no longer have to have specific software downloaded on their computers.
- They access the software at https://authentication.liveperson.net/login.html
- Volunteers will need a reliable internet connection. A Computer, smartphone or tablet will work.
- They have LAWO’s account number and are given a username and password that remains the same unless they choose to change it.
LivePerson Access

https://authentication.liveperson.net/login.html

Access with your PC or Mac Smartphone Tablet
What the LivePerson screen looks like for the Volunteer
What the volunteer sees continued....
This drop down is found in the very top right corner.

To mute the “ding,” click on the speaker.

After you are chatting with your client, you may want to mark yourself as away. This keeps others from trying to chat.
Accept a Chat
How is LivePerson a helpful tool for the volunteer attorney?

- The web-based program has what is called predefined content. Content already developed by attorneys that specialize in poverty law areas the volunteers will chat about.

- The content already quotes and makes references to the Ohio Revised Code sections of the law that are relevant to the issue you are chatting about.

- The content can be updated on changed by the program with access whenever needed.

- Topics areas can be added or subtracted as needed.

- Attorneys can type anything they want to tell the client in the chat window or they may use all or part of the predefined content.
Predefined Content

You can move Predefined content to the left here
The predefined content is organized by subject area.
The predefined content also has instructions for beginning the chat and ending the chat.

Hello, I am a volunteer attorney with Legal Aid of Western Ohio. We have been scheduled to "chat" about your legal situation. Before we begin, I need to be sure I am "chatting" with the right person.
How it actually looks when the operator or volunteer attorney is chatting.
Wrap-up

- At the end of the chat the volunteer attorney uses survey questions at the end of the predefined content to get feedback from the client on the LiveChat project.

- They also go back and save their chat transcript notes into our case management system for that client.

- There is also chat conclusion predefined content to conclude the chat and then end engagement before logging out of LivePerson.
Ending the Chat

1. About Homeless

The defendant(s) in this case may not have had the right to appear in Court. The Complaint will tell you why your landlord thinks you are entitled to the return of possession of the premises. The Complaint may also tell you if the landlord is also suing you for money.

If you disagree with the "3 Day Notice to Leave" and do not move, the landlord may then file an eviction action. If you do not already done so, talk with your landlord.

Having an eviction on your record may make it harder to find housing in the future. You may be able to work out an agreement by talking to your landlord. It is best to get any agreement in writing. It should say that if you do your part the landlord will not file an eviction. Some examples might be that you will move out or pay your late rent by a specific date.
Questions? We’re here to help!
Thank You!

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Beyond the Hotline - LiveHelp @ 8!
LiveHelp in New York

- Bilingual livechat launched in 2010
- LiveHelp covers all New York State Counties.
- Staffed by volunteers
- Supervised by LiveHelp Coordinator/Attorney
LiveHelp in New York

❖ Covers civil legal issues most often faced by low-moderate income people

❖ LawHelpNY offers content on 11 areas of law with organizational listings for over 600 legal service projects

❖ Top issue areas for LiveHelp requests - family law, housing and public benefits

More Issues: Health and wills, Seniors, Veterans and military, Criminal records, Discrimination View all issues

LawHelpNY.org
Law students and graduates from
Our Training

- 2 hours: legal advice vs information, cultural competency and issue spotting
- 30-90 minute webinars on: family law, foreclosure, immigration, tenant rights to repairs and eviction for non payment of rent
- Small group practice chats – walk thru Comm100 and respond to hypotheticals
- Bilingual canned responses including resources on common questions/issues

LawHelpNY.org
Supervision

- Real time monitoring chats and/or availability online through google
- Review of volunteer chat transcripts
- Weekly best practices emails to all volunteers
- Review of pre and post chat user and volunteer surveys
Our look over 8 years
Collaborations - LIFT

- Overwhelming number of chats dealing with family court issues
- Launched 1 day per week on Fridays in 2014
- Expanded 2015 to Monday-Friday 12-3pm
- LIFT launched chat on their site due to successful collaboration
- LiveHelp volunteers can transfer family court chats to LIFT operators
CourtHelp Collaboration

- Launched on Foreclosure page Fall 2015
- Launched on Families and Children pages Spring 2016
- Funded by New York Bar Foundation, Department of Youth and Community Development and IOLA
LiveHelp Technology

2009-2016

2016-present

Quick Access

Get Online & Chat
Install Code
Add Agents

LawHelpNY.org
Questions to think about if interested in launching LiveHelp

<table>
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<tr>
<th>Scope of assistance?</th>
<th>Who will staff?</th>
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<tbody>
<tr>
<td>❖ Legal information</td>
<td>❖ Hotline staff</td>
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<tr>
<td>❖ Unbundled legal advice</td>
<td>❖ Intake staff</td>
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<tr>
<td>❖ Intake screening</td>
<td>❖ Volunteers</td>
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<tr>
<td>❖ Warm referrals</td>
<td>❖ Law students</td>
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<th>What type of supervision?</th>
<th>Technology?</th>
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<tr>
<td>❖ Real time monitoring of chats</td>
<td>❖ Chat software</td>
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<tr>
<td>❖ Periodic review of transcripts</td>
<td>❖ Communication method with volunteers</td>
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<tr>
<td>❖ Real time back up to operators</td>
<td>❖ Training tools</td>
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<td>❖ Hours of operation</td>
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LiveHelp in New York

For further information

Contact: LiveHelp Coordinator – Aimee Latorre, Alatorre@nylawhelp.org