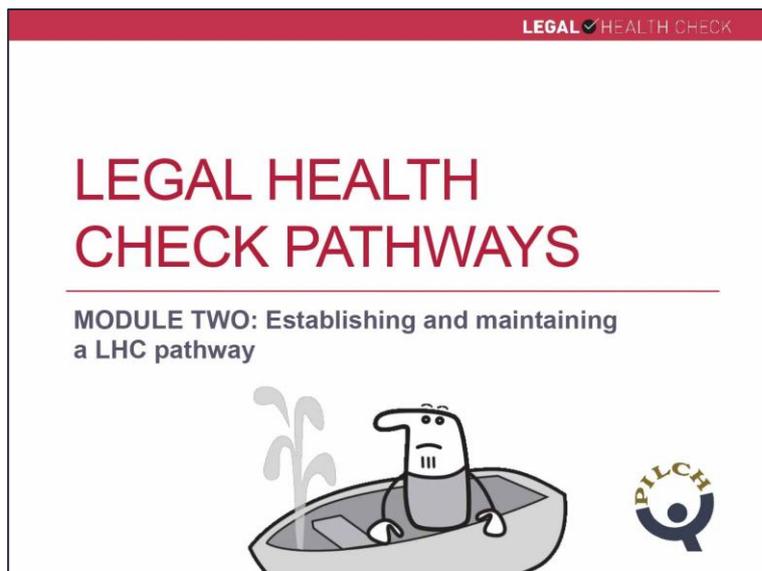


# Legal Health Check Pathways

Module two notes



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## Review of Module One: Why Bother?

Module One covered:

1. Context
2. Your service delivery model and vulnerable clients
3. Three ways to widen the path to your door
4. What can you change?



If you completed Module One with your Legal Assistance Service Team and you want to explore how to establish and build a LHC Pathway with a community agency, this module can assist you.

We will assume there are no motivation issues for your service, so now you just want the “how-to”.

Another helpful resource which covers some of these collaboration concepts (soon to be updated) is the Health Justice Partnerships Toolkit. <http://www.justiceconnect.org.au/sites/default/files/HJPs%20Toolkit.pdf>

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## Module Two Introduction

This resource is based on the joint training delivered at the pilot sites for Phase Two of the independent evaluation, as well as the findings from that evaluation.

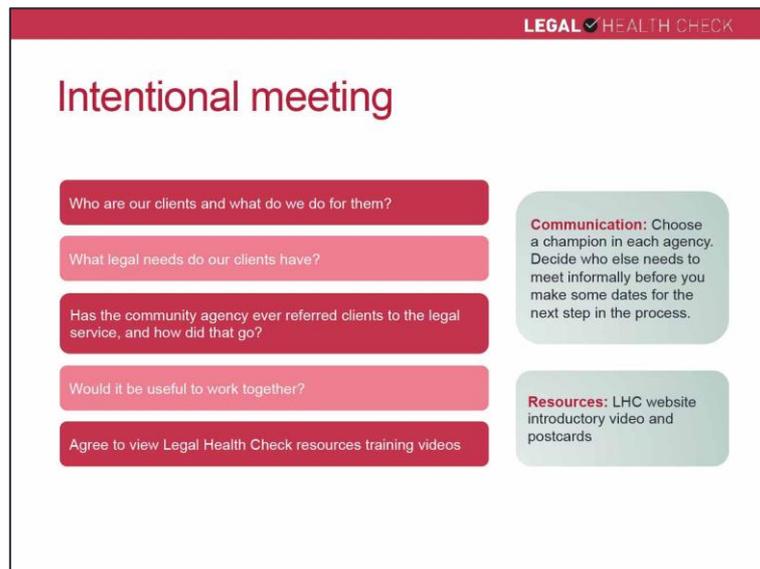
Creating a Legal Health Check pathway follows a process like that in any healthy relationship, and uses the same ingredients for success...



A summary of the Phase Two evaluation which includes the Best Practice Components of collaboration in the Project Report Appendices.



Each of these elements is a process on its own and will involve at least one or two face to face meetings with staff from the community agency.



Considering which community organisation to collaborate with is covered in Module One, so this module assumes you have formed a view and now want to meet to decide.

There may be more than one of these intentional meetings and they may need to be at different levels between and across the organisations, involving management and front-line staff before you can move to the next stage of the process.

They may start with your legal service sharing the introductory video and postcards from the Legal Health Check website with the community agency and asking if they want to discuss collaborating.

The findings from Phase Two of the LHC evaluation confirm the assertions of the LHC website videos and some are on the next slide. Share these findings with the community agency. Questions to answer from the perspective of each agency are on the slide.



These findings from the evaluation are also useful to share in the get to know you sessions which follow.

Participants said:

*“The LHC is proactive as it gets information earlier and therefore the worker is able to make a referral earlier than would have previously happened” (a community worker)*

*“It’s easier to book the appointment with the community worker as they have already talked to the client and know when they’re available” (a legal service representative)*

*“We check in with clients after their appointment and ask how it went”*

*“The legal service rang me and said that my client hadn’t shown up again, so I apologised, but I had lost contact with my client ... and they said they couldn’t get hold of my client either which made me feel better because I thought, it’s not just me”.*

*“They (the community service) have brokerage which enables appropriate work to happen, for example they paid for this client’s TICA application. The caseworker explained the situation and paid for the application and therefore I could assist the client more easily.”*



Before this session/s, all staff need to have viewed the four training videos (total of around 30 minutes) and have explored the resources on the LHC website: [www.legalhealthcheck.org.au](http://www.legalhealthcheck.org.au). You can use the Quiz Questions in the Project Report Appendices to review all participants' understanding.

**Champion:** The key contact person in each agency. They are responsible for leadership of the Pathway across their organisation as well as connecting to the paired agency. Many legal, community and health organisations are complex and offer a range of programs and services. Not all programs and services will participate in the LHC Pathway. There may need to be contact persons appointed for each participating program in each agency.

**Introductions:** Any relevant information which has been learnt in the earlier intentional meetings should be shared. You may have and share organisational charts which indicate how services and staff from your agency interact. All staff should attend – legal, administrative and advocacy staff.

**Professional differences:** Lawyers and community workers apply different skills, assessment criteria and practice frameworks to the client, to their "issues" and to communication. Broadly, social workers see the client as a whole and work alongside them, whereas lawyers view the separate legal issues of the client and work for them. During joint training conducted at the pilot sites, it was clear that terms like "file", "casework" and "conflict" had different meanings for the different professions. It's also helpful to learn what assessment tools/criteria you each use, how long you spend with an individual client (at each appointment and over the length of the case or file), and how open you are to sharing client information within and between the organisations. Professional concerns about confidentiality, legal professional privilege and client privacy will all form part of this discussion. The best way to learn about and manage all of these differences is to talk to each other, leave your assumptions "at the door" and ask lots of questions.

Between now and the next step (planning), each agency should be encouraged to experiment with the LHC resources.

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## Decide and plan

Which LHC?

Community worker spectrum  
1. Completing LHC when/who/how?  
2. Connecting client  
3. Supporting the client

Legal service spectrum  
1. What will you do  
2. What will you refer?  
3. What will you communicate?

Joint LHC = Collaborative Service Planning Template

Referral protocol incl. client consent, phone calls

**Communication:**  
Finalise Joint LHC,  
Joint referral  
protocol and  
distribute to all staff.

**Resources:**  
Service Spectrums.  
Joint LHC, example  
protocol,

**Which LHC?** This will depend on the community service/program which you collaborate with and what the main issues faced by their clients are. If you are unsure, you could start by using the Basic LHC and review from there.

The **community worker spectrum** is available as a poster on the LHC website and is also reproduced in the Appendices. The community organisation should choose a program where case-management services are available, and decide when they will complete the LHC with the clients in that program. **The best results occur when the whole LHC is physically completed**, rather than just some of the questions being asked some of the time. The evaluation confirmed that vulnerable clients don't find the form itself confronting, but that the worker will always need to be a part of the process with the client. It is not a self-help tool. Some agencies have on-line client assessment tools that already ask some questions about legal need. They now use a combination of these and the LHC to cover all relevant legal issues.

**Legal service spectrum:** Use the spectrum from module one to explain the range of ways you might work with a client, depending on the legal issue. Make it clear when you offer advice only, when you refer to another legal service and when it might be useful to speak with the community worker about the client's matter, or have them attend with the client.

**Joint LHC:** This is available in the Appendices (as the **LHC collaborative service planning template**) and needs to be completed jointly. Each service needs to go through each Q and indicate whether that Q will be asked of a client, whether a referral will be made and to which legal service. The legal service can indicate whether there will be an advice, casework or representation response to each Q. Distribute the final version to all.

**Referral protocol:** This document is a flow chart which clarifies for both organisations what happens after a LHC is completed. An example flow chart is included in the next slide. Distribute the final version to all.

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## Joint LHC: Collaborative Service Planning template



Please note: The legal health check identifies potential legal needs. Please complete the mandatory sections at www.legalhealthcheck.org.au before using this resource. Completing this document does not create any legal obligation between a community worker, the client or any legal service.

BASIC  
11.6

Legal Health Check pathway collaborative service planning template

1. Money Troubles (Debt)	Yes	No	Uncare	Community workers	Community lawyers
Is anyone chasing you for money?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Do you have any payments due on unpaid accounts? E.g. phone, electricity, cash, car repairs, health club, hair salon. Complete the table below for each debt, where possible.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Would you like to access your superannuation or insurance cover?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

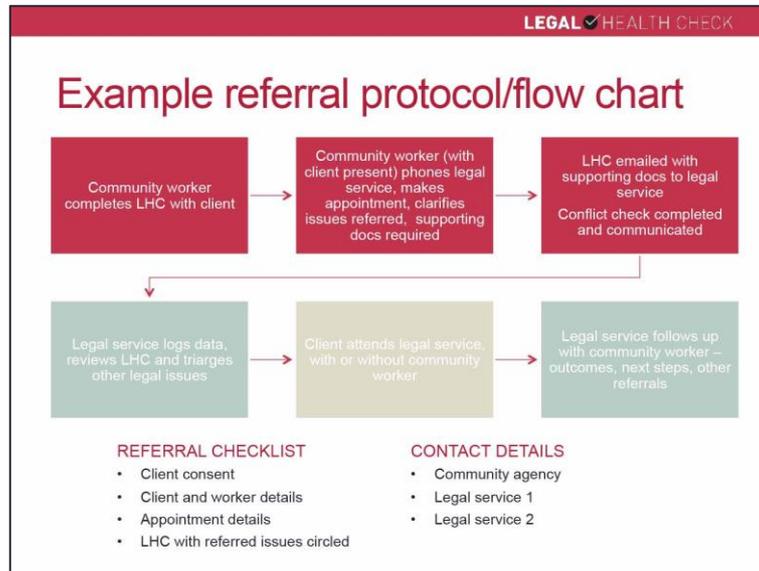
Debt	Creditor	Amount owed	Installment repayments	Current status of repayment
E.g. Telco		\$2500.00	\$100/ptm	yes
1.				
2.				
3.				
4.				

Please retain copy of debt! Creditors prefer bank statements if possible.

This is the first page of the LHC Collaborative Planning Template available in the Project Report Appendices which is an editable word document. Each organisation should indicate what response they will make to each question when a client indicates they have that issue. Examples of responses for the community workers include: internal advocacy/refer to LAQ/refer to [name of your legal service] /don't ask this Q etc

Examples of responses which the legal service will include are: advice only/please ring to discuss /casework/representation/refer to [other legal service].

This document is dynamic but indicates the intentions/expectations that each organisation can have about how the various legal issues of the client will be handled. It will need to be updated, perhaps quarterly, as each agency learns what else is possible in the collaboration. For instance, there may be no initial capacity in the legal service to provide casework about SPER matters, but training etc might occur which creates capacity.



This is one potential protocol to base your version on. What specifics you include depends on what each agency needs to know/communicate. The legal service may do a conflict check when they get the LHC and docs. What other documents you provide can include client consent forms, contact details for the client and worker. Try to use existing processes where possible. The LHC does not of itself become client instructions - the client/lawyer relationship only commences when the client appointment with the lawyer occurs.

The legal service may want to review the incoming LHC prior to the client's appointment to triage the issues raised and then distribute the task to specific services/programs/staff; or have individual lawyers only deal with a specified legal issue raised, but still be aware of other issues raised on the LHC. Either way, it is important that the physical LHC is reviewed by the legal service.

From the evaluation” “ The initial phone call to the legal service from the community worker proved very useful as it provided “*the ability to do a conflict check, reduce administration and streamline the process. This was not really about the LHC but more about the improved relationship and improved communication that came from having direct contact with the community worker while making the appointment for the client*”.

If you plan to collect data about these LHC referrals to inform any review of the collaboration, you will need to include this process in your flowchart.

Both community workers and legal staff are encouraged to follow up about individual clients with each other. Clients might not turn up, understand the next steps or get confused when other legal services/lawyers become involved.

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## Nurture

- Follow up with community worker after appointments
- Meet for coffee at other agency
- Update and distribute the referral template/flowchart
- Plan to meet quarterly to review
- Update contact details regularly
- Introduce new workers to other agency
- Share newsletters
- Tell stories together at events /in media
- Think about law reform and systemic responses
- Encourage community workers to attend legal appointments

You may consider a range of strategies to keep the collaboration real and responsive. Plan who will lead this on-going role. On-going communication is essential to keep the process effective for both organisations and therefore effective for the client.

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Please note: The Legal Health Check identifies potential legal need. Please complete the triaging module at [www.legalhealthcheck.org.au](http://www.legalhealthcheck.org.au) before using this resource. Completing this document does not replace any legal advice received from a community worker, the client or any other service.

Basic v1.0

**CLIENT NAME** \_\_\_\_\_

**COMMUNITY AGENCY** \_\_\_\_\_

**WORKER NAME** \_\_\_\_\_

**DATE** \_\_\_\_\_

**LEGAL SERVICE** \_\_\_\_\_

**ADDRESS** \_\_\_\_\_

**APPOINTMENT DETAILS** \_\_\_\_\_

**1. Money Troubles (Debt)** Yes No Unsure

Is anyone chasing you for money?  Yes  No  Unsure

Do you have payments due or unpaid accounts?  Yes  No  Unsure  
(E.g. phone, electricity, gas, council rates, library, other loan)

Complete the table below for each debt, where possible

Would you like to access your superannuation or insurance cover?  Yes  No  Unsure

Debt	Credit/Debtor	Amount owed	Instalment payment	Contact
1. Telco		\$200.00	\$100/mo	1800 011 011
2.				
3.				
4.				

Please attach copy of client's Centrelink and/or bank statements if possible.

**2. Unpaid Fines** Yes No Unsure

Do you have any unpaid fines (e.g. SPER, SDR, CC)?  Yes  No  Unsure

Would you like to explore your options? (E.g. smaller instalments? Work unpaid? Waiver?)  Yes  No  Unsure

DETAILS

**3. Housing Concerns** Yes No Unsure

Have you recently been evicted?  Yes  No  Unsure

Was your tenancy bond (rent) and returned?  Yes  No  Unsure

Do you have any belongings left behind at rental accommodation?  Yes  No  Unsure

Do you have any unpaid rent?  Yes  No  Unsure

Are you or do you want to apply for government or community housing?  Yes  No  Unsure

Are you on any tenancy ban/limits (e.g. TRCA)?  Yes  No  Unsure

DETAILS

**4. Crime** Yes No Unsure

Do you have a Notice to Appear, or are you due in Court?  Yes  No  Unsure

Do you need to deal with any outstanding warrants?  Yes  No  Unsure

DETAILS

**5. Centrelink and Decision-making** Yes No Unsure

Are you receiving the appropriate Centrelink benefit?  Yes  No  Unsure

Are you under a Financial or Involuntary Treatment Order?  Yes  No  Unsure

Does the Adult Guardian look after your personal or health affairs?  Yes  No  Unsure

Does the Public Trustee make decisions about your money?  Yes  No  Unsure

Would you like to change or review any of these arrangements?  Yes  No  Unsure

DETAILS

**6. Relationships** Yes No Unsure

Would you like to discuss...?  Yes  No  Unsure

Domestic violence orders you want, need or are subject to?  Yes  No  Unsure

Arrangements, plans or orders about children? (e.g. with the children live with, spend time with, or your involvement in major long-term issues)  Yes  No  Unsure

State child protection orders or concerns about your or any children?  Yes  No  Unsure

Your rights in any personal relationship, including divorce or separation?  Yes  No  Unsure

Concerns about your experiences as a DHS, while you were in the care of adults or institutions?  Yes  No  Unsure

DETAILS

**7. Other** Yes No Unsure

Do you have any other concerns that you would like to raise with a lawyer?  Yes  No  Unsure

**Please forward this form to your community lawyer.**

For a list of local community lawyers check [www.legalhealthcheck.org.au](http://www.legalhealthcheck.org.au) for details.

Warning: You have a copy of a completed legal health check. It is subject to your organisation's privacy obligations.

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## Review and plan

- Follow up with community worker after appointments
- Identify training needs for better processes
- Identify improvements in referral processes
- Are you using the most appropriate LHC?
- Identify and plan legal information training needs
- Identify and plan client care training from community/health workers
- Identify alternative legal referral points
- Would an outreach or phone clinic work better?
- Review and share data



The organisations should plan to internally and collaboratively review some aspects of the collaboration quarterly (service leaders) and to meet (all relevant staff from both organisations) and conduct joint training at least an annually.

*“Community services haven’t been inclined to send clients to a lawyer for assistance before. That’s changing now”*

*“Other DV services have also expressed interest in using the LHC and improving their referral process with us”.*

*“We have identified that further training needs to happen regarding debt. SunnyKids has a specific worker for this, so we think that they’re dealing with this, but we also do it, so things might be falling between the gaps.”*

*“Our service recognises that we need to work more closely with community services. It’s a change in our mindset and the LHC is a great tool to assist this.”*

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### Please let us know about your experiment

Contact [hplc@qpilch.org.au](mailto:hplc@qpilch.org.au) for more details or feedback.



**MINI LEGAL ✓ HEALTH CHECK**

**CLIENT**  
Up to three legal problems each year

**COMMUNITY WORKER**  
“Let’s go through the Legal Health Check”

**LAWYER**

LEGAL ✓  
HEALTH CHECK

[www.legalhealthcheck.org.au](http://www.legalhealthcheck.org.au)



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