



Pro Seniors

Legal Help for Ohioans
Age 60 and Older

proseniors.org



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Advice, Representation, and Justice for Ohio Seniors

**We help Ohio seniors resolve legal
& long-term care problems
& fight Medicare fraud.**

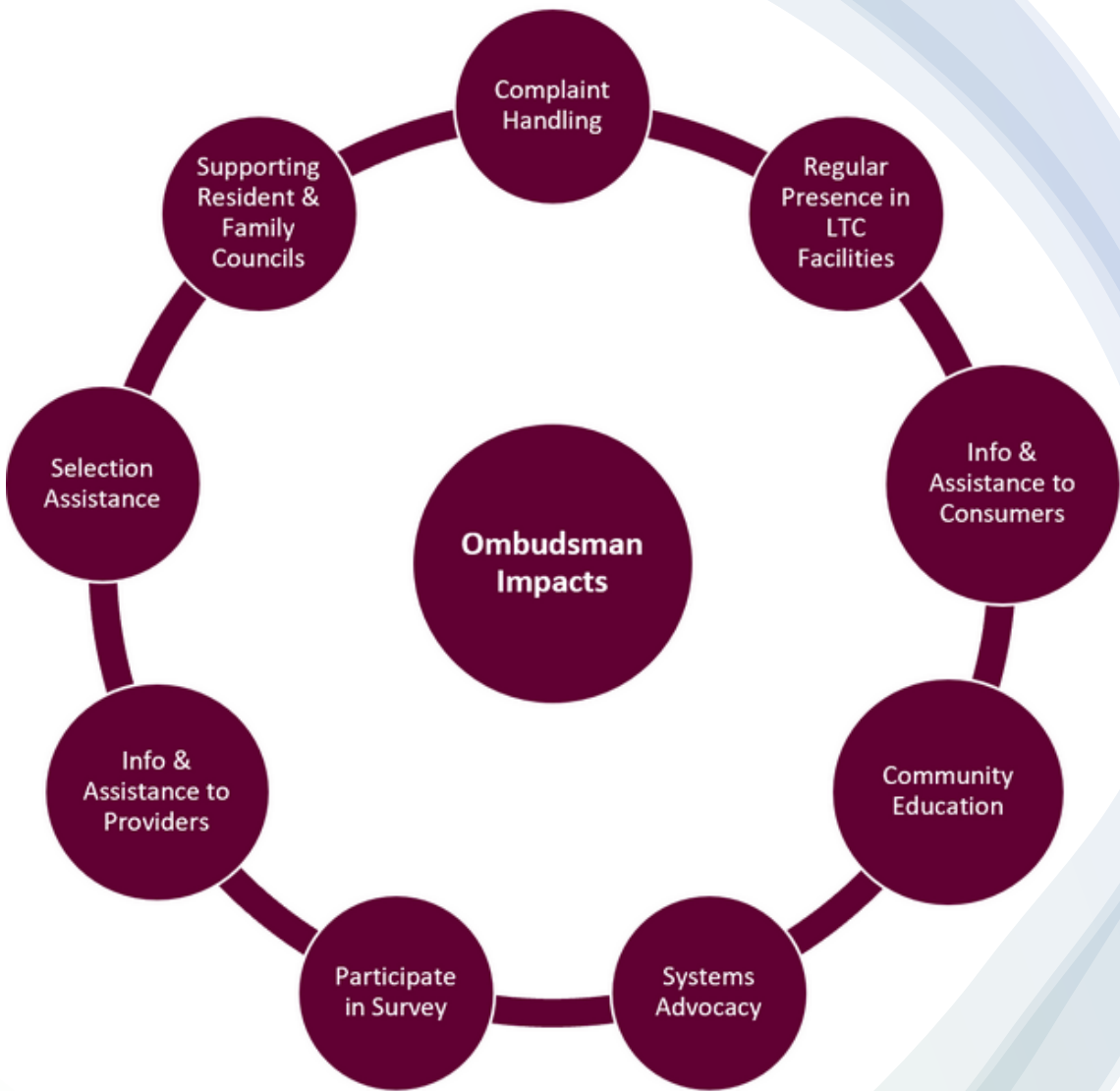
[Our Services](#)



Pro Seniors' Services: Long-Term Care Ombudsman

Ombudsmen advocate for excellence in long-term services and supports wherever consumers live.

Pro Seniors' Long-Term Care Ombudsman service area includes Butler, Clermont, Clinton, Hamilton, and Warren counties in Southwest Ohio.



To assure consumers are receiving excellent services and support, Ombudsman representatives perform a variety of services to improve the quality of care being offered.

Among these core services are visits to long-term care facilities to ensure a regular presence by these state-certified advocates to help residents know and exercise their rights.



Preventing Medicare Fraud

Pro Seniors' Services: Ohio Senior Medicare Patrol

Our Senior Medicare Patrol Team helps Ohioans prevent, detect, and report Medicare fraud, errors, abuse and scams.

Our team conducts statewide outreach and shares best practices to protect personal information and avoid identity theft.

Ohio Senior Legal Services

- Older Americans Act
- Title III-B Legal Services Providers/Legal Aid Network
- Services Targeted to Seniors with Greatest Economic & Social Needs
- Supply/Demand

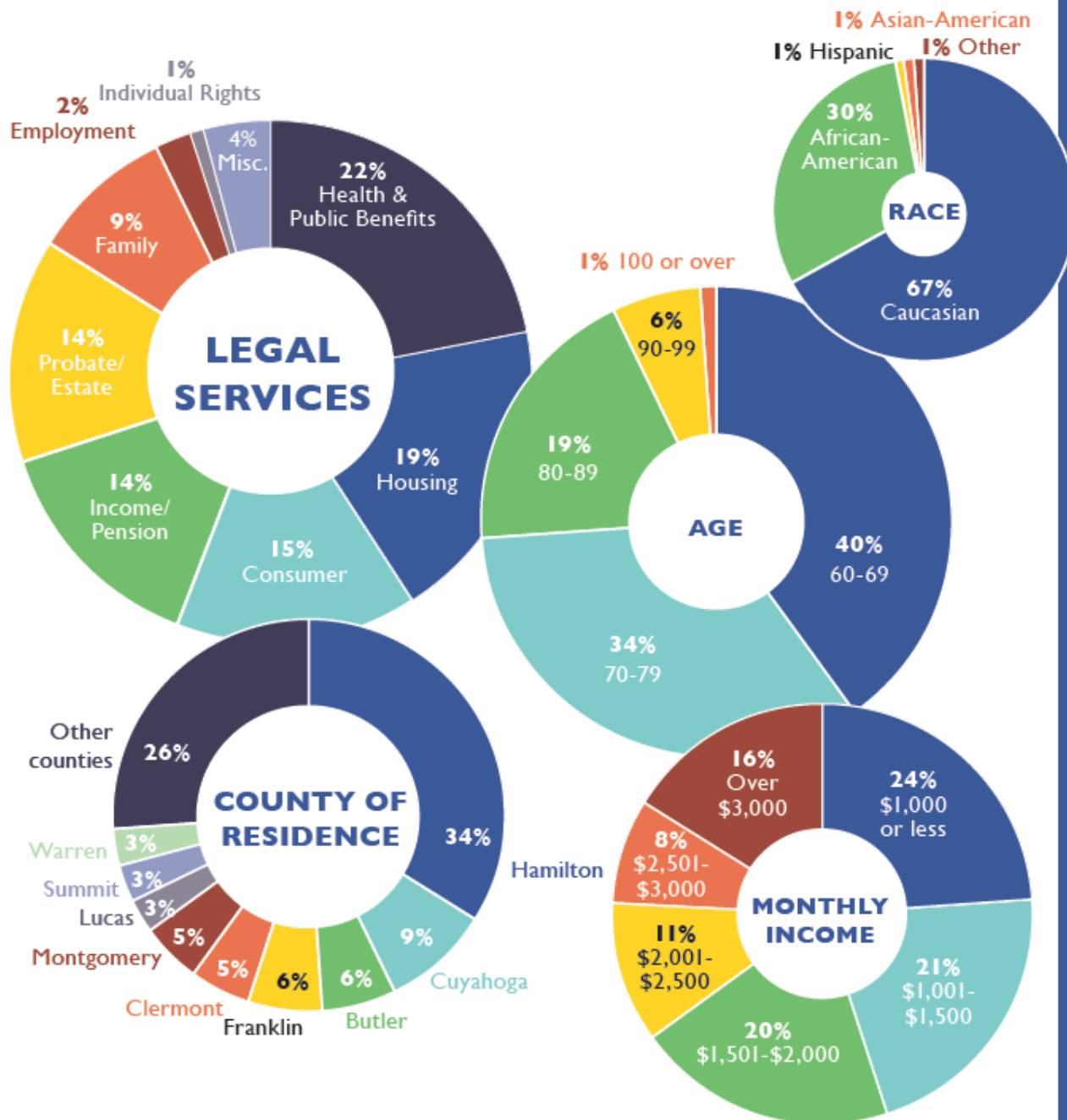




Pro Seniors' Services: Legal Assistance

Our legal help includes:

- Information, advice & counseling
- Extended representation
 - Lawyer referral



7,582
clients helped

8,755
legal matters handled

5,739
clients with a disability

873
veteran clients

Who We Serve



Pro Seniors' Legal Helpline

- Staffed by experienced attorneys
- Preset 30-minute appointments
- By telephone
- Free legal advice & counsel

How Can We



You?

- **Refer Clients to Our Helpline**
- **Helpline Attorneys Do Not Represent Parties in Court, But Can...**
 - **Advise on Rights and Legal Options**
 - **Help Understand Legal Processes / Concepts**
 - **Help Fill Out Paperwork**
- **This is a way to get legal advice for seniors in your area**

Helpline Referral Guide



Department of
Aging



FREE

LEGAL HELPLINE

Legal Assistance Referrals for Older Adults



Did you know Ohio is one of only 20 states with a free legal helpline for older adults?

Referring older adults to Ohio's Legal Helpline is an important first step that helps extend limited legal assistance resources. Ohio's Legal Helpline, operated by Pro Seniors, provides 30 minutes of free legal information, advice, and referral on any civil matter for residents of Ohio age 60 and over, regardless of income or resources. If more extensive assistance is needed, the helpline will refer consumers to another legal assistance provider or a private attorney in the consumer's area.

How does the Legal Helpline work?

1. Call the Legal Helpline.
2. An Intake Specialist will gather the following information: name, address, demographics, phone number, and the legal question or problem.

The information provided enables the Legal Helpline attorney to quickly focus on answering questions and discussing options within the 30 minute appointment.
4. The Intake Specialist will schedule a telephone appointment with you and a Legal Helpline attorney.
5. The Legal Helpline attorney will call the consumer during the scheduled appointment time.



Most common legal issues for older adults in Ohio:

- Access to benefits such as Medicare, Medicaid, Social Security, Veterans benefits, food assistance, and subsidized housing;
- Medicare and Medicaid eligibility, enrollment, changes, termination, and appeals;
- Medicaid estate recovery;
- Consumer debt due to health care costs;
- Rental housing including issues related to rent, eviction, security deposits, utilities, and conditions of property;
- Home ownership including issues related to foreclosure, predatory lending, and reverse mortgages;
- Consumer protection from fraud and financial exploitation;
- Planning for the costs of long-term services and supports; and,
- Advance directives and supportive decision-making.

aging.ohio.gov

Call the Legal Helpline: 513-345-4160 or 800-488-6070

Telephone appointments are available
Monday through Friday from 8:30 a.m. to 4:30 p.m.

How it Works

1. **“Do you want to talk to a lawyer?”**
2. **Provide Pro Seniors number: 1-800-488-6070 (Statewide-toll free)**

Non-Profit – same as a referral to Legal Aid

- **Telephone Consultation(s) 100% Free to the Party**

1. Party Calls our Helpline

- **Appointments typically scheduled w/in 10 days**
- **Attorneys speak with family member, guardian, etc.**
- **Referral to private attorney at reduced cost / pro bono (if appropriate)**

The Most Common Issues We Advise Clients On

Medicaid

Approximately 1,900 Calls per year

- Medicaid Eligibility
- Medicaid Problems
- Medicaid Estate Recovery

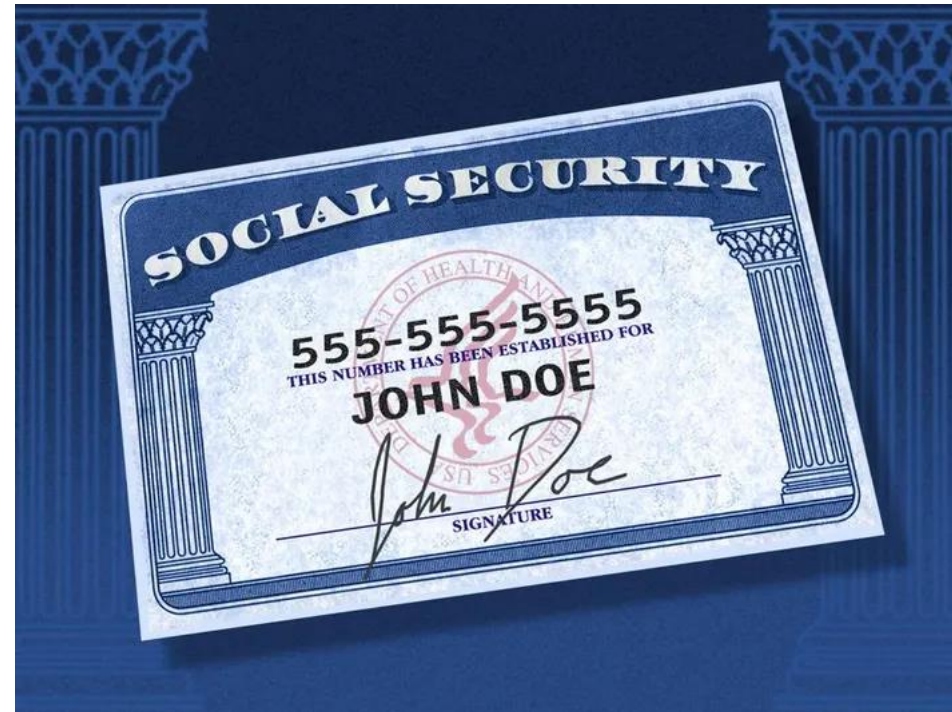
Medicaid



Income & Pension

Approximately 1,200 Calls per year

- Social Security
- SNAP
- Veteran Benefits
- Pensions



Housing

Approximately 1,600 Calls per year

- Evictions
- Mortgage (foreclosure and mortgage problems)
- Neighbor disputes



Consumer

Approximately 1,500 Calls per year

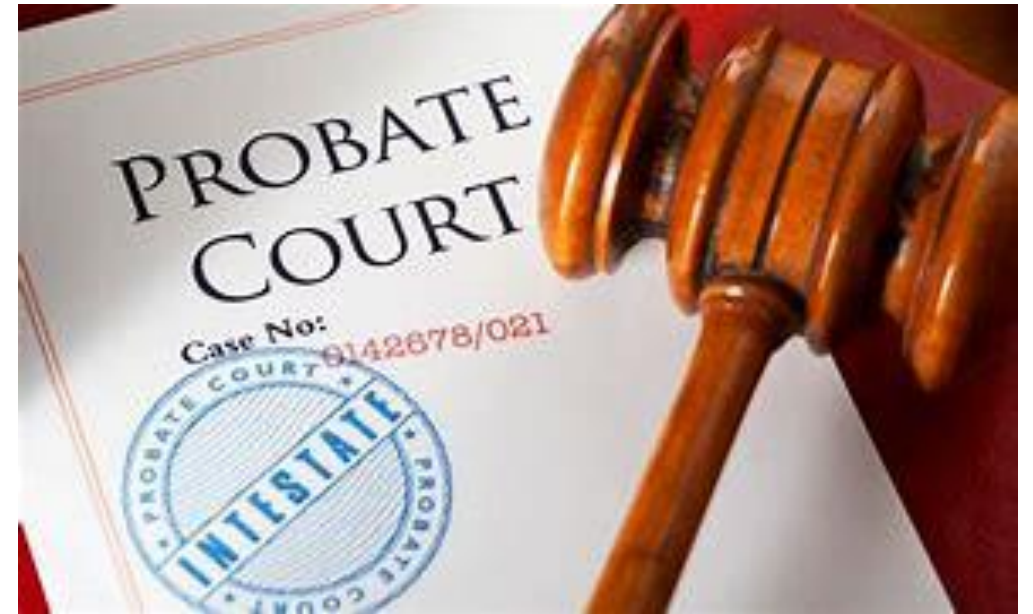
- Debt Collection
- Business Disputes
- Small Claims



Probate

Approximately 1,300 Calls per year

- Estate Administration
- Avoiding Probate
- Advance Directives
- Wills and Trusts
- Guardianship Defense



Family Law

Approximately 600 Calls per year



- Divorce and Dissolution
- Grandparent Rights & Custody
- Financial Exploitation by Family

Types of referrals

- Hot
- Warm
- Cold
- Other



Referral organizations

- Internal—within your organization
- Legal service providers
- Social service agencies
- Government agencies
- Others

Considerations for making appropriate referral

- Eligibility criteria
- Priority/appropriate cases
- Differences in services based upon geographic location, program, etc.
- Tools to define appropriate referral (i.e., automated scripts, menus, etc.)
- Staff making the referral
- Ethical issues/client confidentiality when making “hot” and “warm” referrals
- How to make the referral (electronically, by phone, etc.)

Services based upon location, program, etc.

- How to make appropriate referral when more than 1 organization could handle it but through different service levels. This is a domestic violence case. Organization X will handle the case through extended representation but cannot take it for another month. Organization Y will handle it on a limited scope basis and can take it immediately. You feel the best approach for this case type is extended rep. However, Organization Y has a grant for these specific case types and needs more cases to fulfill the grant.
- How to make an appropriate referral when more than 1 organization could handle it but the quality of legal services differs based upon the organization. For example, Organization X can take the case immediately, but their attorney does not have a good reputation in the legal community. Organization Y cannot take the case for another month, but their attorney is well known and liked. Time is a factor but not dispositive.
- How to make an appropriate referral when the legal service program in the geographic service area Client resides in cannot or does not accept the specific case type; however, the legal service program nearly 3 hours from Client can accept the referral so long as Client is willing to travel to the attorney's office and court.
- Other scenarios

Transfer of referral information

- Email
- Phone call (warm or cold)
- Other

Tracking referrals

- Which referrals do you track?
- How and where do you track them?
- Do you track outcomes of referrals?
- How does your organization use this data?

Hypothetical #1



- Ms. C calls AAA.
- She is age 90, blind, and uses a wheelchair.
- She asks about services available through your tax levy program.
- She appears to be a perfect candidate for a home care waiver.
- She refuses. "I don't want Medicaid."
- "I heard I have to sign away my house if I apply for Medicaid."

Hypothetical #2



- You visit Mr. G at his home
- He is age 89.
- He asks if you have any food. He appears malnourished.
- There is no food in the refrigerator.
- He has transportation available. He says he just doesn't have any money to buy food
- What questions should you ask?

Referrals

Phone:

513-345-4160

800-488-6070

Website:

proseniors.org



QUESTIONS ?

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