STRENGTHENING MEDICAL-LEGAL PARTNERSHIP PRACTICE

Types of trainings that help meet patients' needs and strengthen the health care and legal workforces

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AUTHORS

Kate Marple, MSc
Director of Communications & Senior Research Scientist
National Center for Medical-Legal Partnership

Mallory Curran, JD
Principal
Mallory Curran Consulting
Senior Advisor
National Center for Medical-Legal Partnership

Ellen Lawton, JD
Director
National Center for Medical-Legal Partnership

Danielle Rahajason
Project Lead
National Center for Medical-Legal Partnership

CONTACT

For more info about medical-legal partnerships:

National Center for Medical-Legal Partnership
medical-legalpartnership.org

Training is one way that medical-legal partnerships strengthen the skills and knowledge of both the health care and legal workforces to better meet the social needs of patients. Medical-legal partnerships typically train three groups:

- **The health care workforce.** The clinical and non-clinical health care workforce receives training directly from the MLP legal team — with guidance from the health care MLP champion(s) — about the types of legal issues patients face, how the legal team can help, and how to identify patients' legal needs and make referrals. These trainings also build staff engagement by providing a forum for learning, questions, concerns, and input.
- **MLP lawyers and paralegals.** Trainings for MLP lawyers and paralegals focus on health and health care concepts, and are important for enhancing the legal team members' ability to serve patients, as are trainings related to the health care organization's operations, culture, and mission. These trainings are typically conducted by health care MLP champions and colleagues.
- **Patients.** Many MLP legal teams offer trainings directly to patients. These are most commonly "know your rights" trainings that educate patients on their rights around specific legal issues.

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Each MLP team should think strategically about all trainings, how they are rolled out, and the frequency of those trainings. While there are no MLP trainings used universally across all partnerships — trainings are specific to their health care setting, the people served by an MLP, and the issues handled by an MLP — there are steps every MLP team can take to plan for their trainings:

1. **Define the audience and goals for the training.**
2. **Decide on the content.** MLP training can encompass a lot of concepts and is usually delivered in a short amount of time. Identify the most important messages to impart and tailor messaging for the target audience.
3. **Choose the most effective forum for that training.** Sometimes a formal training session is best. Other times, follow up questions and concerns can be better addressed through a regular forum for the MLP legal team to touch base with staff, such as having the lawyer and/or paralegal attend weekly or monthly clinical team meetings.
4. **Discuss / evaluate the effectiveness of the training.**
5. **Make it an ongoing activity.** Staff turnover, low referral numbers, or confusion about the screening process or referral workflows are common reasons for follow-up trainings. Beyond the basic training curriculum, the full MLP team — health care and legal staff together — may identify specific legal topics that are of interest to health care staff and conduct additional topical trainings as a result.

Table 1 on pages 3-5 offers suggested content, forums, and training tips for each audience. Health care and legal team members should work together to identify training needs, develop curriculum, and select training forums.

TABLE 1. TYPES OF MLP TRAININGS

AUDIENCES	POTENTIAL TOPICS/ CONTENT	POTENTIAL FORUMS	TIPS
TRAININGS FOR HEALTH CARE STAFF			
If the MLP is in a specific clinic, a training may target all health care staff in that clinic. If the scope and reach of an MLP is throughout an entire health care organization, an incremental plan may be needed for training priority staff, such as those most closely involved in screening and referring patients for legal services. Health care staff members who might benefit from MLP training include: • Health care providers (Physicians, Advance Practice Nurses, Physician Assistants, Behavioral Health Providers) • Nurses • Medical Assistants • Social Workers • Case Managers and Care Coordinators • Community Health Workers • Behavioral health care team members • Registration staff • Clinical leadership • Health care learners (Residents, Fellows, Nursing Students, Behavioral Health Students) • Other staff that assist patients with social needs	• Types of civil (as opposed to criminal) legal issues that patients face, including the results of an MLP needs assessment; • Explanation of how the MLP legal team can assist with identified issues. It's helpful to include specific examples of how the legal team intervenes, what the legal outcome may be, and how this might improve the patient's life; • Description of how the MLP operates at the health care organization (i.e. how to screen patients for unmet social and legal needs, the MLP referral procedure, availability of the legal team, how to contact the legal team with questions during on-site and off-site hours); • Criteria that affect patients' eligibility for free legal services, including any income limits, and info about issues the MLP does and does not address; and • Discussion of patient/ client confidentiality and the consent process.	Health care staff should help identify the right opportunities for trainings. Potential forums include: • Employee orientations and onboarding; • Clinical team meetings and huddles; • All-staff meetings; • Stand-alone training sessions on MLP (i.e. conference space is booked and staff are invited to attend an MLP training session); • Funneling training information and materials through health care MLP champions and asking them to share with staff; and • One-on-one curbside consults.	• Seek out help from a health care organization staff member or clinical champion who can help make the content relevant and digestible for a non-legal crowd; • Illustrate training topics with success stories, case studies, examples, and data; • Don't expect that everyone will take notes. Consider leaving something behind (business card, one-page handout with the legal team's contact info); • Learning is a two-way street. The legal team should use trainings as an opportunity to learn from staff, take suggestions, and improve workflows and services; and • If resources permit, use a brief pre-training survey to take a baseline of an audience's knowledge prior to the training in order to anticipate questions and refine the content of the training.

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TRAININGS FOR LEGAL TEAM			
• Lawyers and paralegals staffing the MLP • "Contract it" model only: Lawyers, paralegals, and law students who work at the legal services organization or who are pro bono lawyers, who may take on a case from the MLP because of a specialized legal area, but who do not directly work with the MLP • "Contract it" model only: Leadership and other staff at the legal services organization	• Information on the health care organization's structure and mission; • Information about the roles of health care team members and how they function together; • Explanation of the specific health care and health issues the target population(s) face and how they intersect with social needs; • Advice for phrasing legal questions or statements in a non-triggering and supportive way, including using trauma-informed language and a strengths-based approach, so that difficult conversations that are essential for the legal team to have with a patient are easier and do not cause additional distress; • Strategies to effectively convey legal information to patients taking into account their familiarity with legal services and their unique health conditions; and • Guidance about what clinicians can and cannot do for patients related to legal concerns in order to maintain the clinical treatment relationship.	• Informal consults between a provider and a legal team member; • "Contract it" model only: Legal services organization's staff meetings; and • Stand-alone training sessions (i.e. conference space is booked and staff are invited to attend an MLP training session).	• Seek out help from a legal team member who can help shape the content in ways legal team members will understand; • Start with the basics. Assume that legal team members need the most basic information about how the health care organization operates and about which team members do what; and • Keep in mind that while most clinicians and health care professionals are trained to work toward the general rule, lawyers are trained to work toward the exception. This affects how lawyers learn and approach new information.

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TRAININGS FOR PATIENTS			
May be open to all patients and staff, as well as community members and advocates, or just to certain populations. For example, People's Community Clinic in Austin offers regular public charge trainings for nonimmigrants, immigrants, and their advocates.	• Typically a "know-your-rights" presentation on a specific legal topic (e.g., People Community Clinic's Gender Affirmation: Law and Advocacy Series to tackle issues specific to trans and non-binary patients, community members, and advocates of the same); and • May be accompanied by a legal clinic, where lawyers in the community provide one-on-one legal services after the presentation. (e.g., People's Community Clinic hosts annual alternatives to guardianship trainings for adolescents transitioning to adulthood with a legal clinic run and managed by law students, supervised by volunteer lawyers from Texas Legal Services Center.)	• Most commonly dedicated live events; • Handouts available in the waiting room or given by a staff member who identified a legal need; • Slide in the scrolling waiting room slide show; and • Community-facing webpages with information and resources.	• Consider audience language needs, as subsequent sessions in different languages may be easier than interpretation, unless it's by headset; • Invite other community advocates. Often social services organizations do not have a reliable resource for the legal needs of their clients (e.g., Head Start); • Have sign-in sheets so you can follow-up. (People's Community Clinic got a grant for its MLP legal team from Texas Legal Services Center to turn its Gender Affirmation: Law and Advocacy Series into a written "know-your-rights" guide, which was shared with attendees and published online); • Be mindful of controversial topics that may not lend themselves to open attendance; • Consider the lunch hour, evenings, or weekends; and • Serve food!