5 Office Hours Activities for MLPs

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with input from the Technology, Data, and Information Sharing Committee of the Kaiser Permanente Medical-Legal Partnerships

“Office Hours” are a regularly scheduled meeting that brings together the local healthcare and legal teams. They are a space to engage in five critical medical-legal partnership (MLP) activities.

01

Conduct Curbside Consults.

The legal team provides legal education in response to healthcare staff questions and assesses whether a situation with a patient is appropriate for referral to the legal team. *Refer to the MLP Curbside Consult job aid for best practices.*

02

Follow-up on outstanding referrals.

The MLP team confirms if and when the legal team has made contact with the patient and troubleshoots situations where contact has not yet been successfully made.

Sample Referral Follow-up

Healthcare Staff: “I obtained verbal consent and made a referral of patient John Doe last week. I didn’t see any follow-up in the third-party referral platform. Has the legal team made contact with him?”

Legal Team Staff: “We tried to contact him three times via phone, but we haven’t connected. Can we double-check that we have the best contact information for him? Or try a ‘warm hand-off’ where we’re on the phone together?”

03

Follow-up on active cases where the legal team is currently helping a patient.

Sample Healthcare Staff Case Check-in

“I want to check in about patient Jane Doe. She’s had a death in the family, and she told me that she’s feeling really overwhelmed by her legal case. Are there things that the healthcare team can do to help make sure that the legal team can keep moving forward on her case? Or is there a way to slow down the progress on her legal case so that she has a chance to regroup?”

Sample Legal Team Case Check-in

“We [the legal team] have a signed HIPAA release/authorization which has been shared with [healthcare organization] for Jane Doe and uploaded into the electronic health record. We need proof of her medical condition in order to request a reasonable accommodation to make her housing safer. What’s the best way to make that happen?”

04

Identify and address training needs.

- Do any of the words or phrases used by the legal team need to be explained? (e.g., jurisdiction, due process, notice to vacate, etc.)
- Did our conversations today raise any topics on which the healthcare team could benefit from training by the legal team? Or topics where the legal team could benefit from training by the healthcare team?
  - What kind of training? (What information? How long?)
  - Who should be trained?
  - Where and when should they be trained? At our next Office Hours or elsewhere?
  - Who will lead the follow-up?

05

Review and update workflows based on on-the-ground experience.

- How are referrals going for healthcare staff? Does anyone have suggestions for how we could change our workflow to make it simpler, more streamlined, or fit better into other related workflows in the short- or long-term?
- How are referrals going for the legal team? Are you receiving the right kinds of referrals at the right time?
- Do referrals seem to be working from the patients' perspectives?

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Rev. September 6, 2023.

Sample Agenda

for Medical-Legal Partnership Office Hours (45 minutes)

MLP teams may want to use an agenda to help guide their conversations during Office Hours. Others may prefer a more free-flowing approach. This sample agenda can be adopted and modified by MLP teams as needed.

5 MIN — AGENDA ITEM #1: WELCOME AND REVIEW OF GROUND RULES & PATIENT CONFIDENTIALITY

Remind staff that it's always okay to say you don't know...

- What an acronym stands for. (e.g., SSI, SNAP, DV/PO, NTV)
- What a legal or healthcare word or phrase means.
- How a particular program or process works.

Review consent protocols, PII, PHI

5 MIN — AGENDA ITEM #2: OUTSTANDING REFERRALS

Check in on outstanding referrals and patients who have not connected with the legal team.

10 MIN — AGENDA ITEM #3: CURBSIDE CONSULTS

Answer legal questions, including about potential referrals for legal services.

5 MIN — AGENDA ITEM #4: ACTIVE CASES CHECK-IN

Review questions and requests from both the legal team and the healthcare team. Discuss how best to follow-up outside of Office Hours if necessary.

It is recommended that the organizer of the Office Hours be notified in advance about which patients' cases participants would like to discuss during upcoming Office Hours.

20 MIN — AGENDA ITEM #5: TRAINING & WORKFLOWS

Discuss what topics the legal team and/or healthcare team would like more information about and how to structure training. Legal team conducts a brief training on a topic identified at a previous office hours session.

Discuss screening and referral workflows and any changes that should be made.

To save time, staff who coordinate or facilitate Office Hours can request feedback on these questions via a short survey.

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