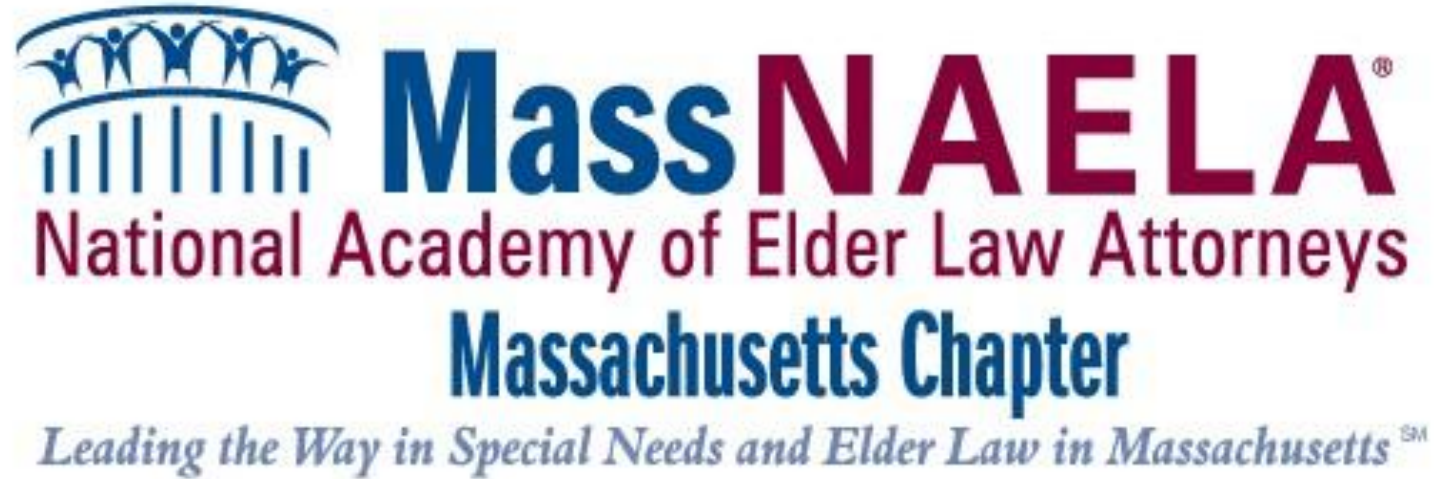




Basic Training For New Staff

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Welcome!

- Purpose of this video/program
- About the organization
- About Elder Law

Part I: Working with clients and general considerations

1. Legal Office Basics

- The role of the attorney in working with clients and family members
- Confidentiality
- Communicating respectfully and directly with the client
- Recognizing signs of diminished capacity
- Best practices for meeting privately with the client
- Ethical duties under the rules of professional conduct

Part I: Working with clients and general considerations

2. Establishing the Attorney Client Relationship

- Identifying who the client is and who is not the client
- Use of retainer agreements
- Confidentiality rules and managing third party involvement
 - Phone calls from family members
- Avoiding and identifying conflicts of interest

Part I: Working with clients and general considerations

3. Software and other considerations for each office

- Practice management software
 - Secure email and privacy issues
- Phone systems
- Copiers, scanning, faxing, filing and printing
- Sending letters/certified mail
 - Keeping copies when sending

Part II: Elder Law Basics

1. Estate Planning (1st section of materials, pg. 1)
 - Wills
 - Powers of Attorney
 - Health Care Proxies
 - Drafting and Execution Standards
 - Delivering and explaining final documents to the client
 - Storage or distribution of originals

Part II: Elder Law Basics

2. Probate and Estate Administration (2nd section, pg. 20)

- <https://www.mass.gov/lists/mupc-hub-documents-instructions-and-resources>
- Counties/filing (in-person vs. e-filing)
- Getting the information/documents from clients Formal, informal, voluntary, guardianship, conservatorship
 - Notice of hearing, publication, service, and letters of authority
- Registry of deeds

Part II: Elder Law Basics

3. MassHealth Applications (3rd section, pg. 49)

- <https://www.mass.gov/how-to/apply-for-masshealth-coverage-for-seniors-and-people-of-any-age-who-need-long-term-care-services>
- Medicare vs. Medicaid
- Community vs. Long-term Care
- Application
- Income and Assets
- 5-year look-back period (discuss resource transfers)
- Submitting the application

Part III: Closing The Case

- Billable Hours
- Termination of representation letters
- Ethical obligations at the end of representation

Part III: Closing The Case

- Correction: During the estate planning video, around minute 31, Clarence stated that wills require two notaries, but he meant wills require two witnesses
- Artificial Intelligence (AI)
- Scenario: Estate planning for a single adult with four adult children