

NEWS

You Can Use

NAELA PRACTICE DEVELOPMENT/MANAGEMENT
SPECIAL INTEREST GROUP

A Message from the Chair

By O. Henry (Mike) Young, Esq.

Gosh! It seems like I just got through dashing off one of these letters to the membership. But that was nearly a year ago and now it's time to report on the past year's activities. It is the aim of all of us on the Steering Committee to provide something to the group that will either make you a better lawyer, more efficient, more profitable, or hopefully all of these.

The participation by members of your Steering Committee has been outstanding. To keep from overloading anyone's boat, we set up specific committee responsibilities and made sure every committee member had a job. **James M. Higgins, Jr., Esq.** and **Thomas J. Murphy, Esq.** were the newsletter working members and both produced articles for NAELA publications. **Vice Chair James Schuster, CELA** and Jim Higgins were recognized for working with **Edward M. Phelps, Esq.** on the breakout program at the Hilton Head Symposium. **Steven J. Feldman, Esq.** and **Warren F. Lake, Esq.** have been devising methods of streamlining and making our website more user friendly and effective. **David A. Dorfman, Esq.** with able assistance by Steve Feldman, has been working hard to revise and produce a new "Best of NAELA" series review. Progress is being made and hopefully this will be a really unique and useful tool for the membership.

Breakfast presentations were made at Miami (*Client Development for the Elder Law Practice*) and at Dallas (*Mini-Pearls and Gems*) by Steering Committee members. Try not to miss Ed Phelps' "Implementing Your One-Page Business

Plan" presentation at Hilton Head. This is the sequel to a fine program he gave in Miami entitled "The One Page Business Plan". I only wish that I had learned about Ed's one page business plan 35 or 40 years ago. The knowledge wouldn't have made me a smarter lawyer, but perhaps a wealthier one. Anyway, it's never too late!

Other members that also worked hard on the Steering Committee were **David J. Correia, Esq., Jeffrey J. Drach, CELA, Judith D. Grimaldi, CELA** and **Jane Skelton, Esq.** When you see any of these folks at Hilton Head, please thank them for their efforts. Better yet, if you have an idea for a practice tip, or something that you would like to see presented as a full-blown program, let one of us know. We are constantly searching for new ideas and new methods.

Against my better judgment, I have been persuaded to serve one more year as your chairman. I would not have considered it without knowing what great support I can count on from the SIG Steering Committee and the NAELA staff! Please help us make your SIG work for you.



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Websites of Interest

Estate Planning Links

<http://www.estateplanninglinks.com>

EstatePlanningLinks.com is one of the Forbes.com 300 best websites.

The Association of the Bar of the City of New York

<http://www.abcnyc.org>

One of the nation's oldest and largest local bar associations, ABCNY serves not only as a professional association but also as a leader and advocate in the legal field on a local, state, national and international level.

Time Matters Tip

<http://www.wellslegaltech.com/CalendarOptions.htm>

A well-displayed calendar can save time and help you stay organized. Time Matters® provides a variety of ways to view your calendar. In the following Time Matters Tip, Wells Anderson, a nationally known technical consultant for lawyers and law firms (and an Authorized Independent Consultant for Time-Matters) gives step-by-step instructions on how to customize your calendar to make it more attractive and useful. Spend a minute viewing Wells' tip and you will be able to build a tool that you will use all day, every day, to improve your practice.

Wake Forest University School of Law Legal Clinic

<http://www.law.wfu.edu/eclinic>

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Your Name Could Appear Here!

Have you always wanted to see your name in print in *News You Can Use*, the official newsletter of the Practice Development/ Practice Management SIG? Would you like to share your expertise with fellow members through the newsletter? If so, this is the perfect opportunity for you! We are looking for members, like you, to submit articles for publication in the newsletter. Articles can be on a number of topics related to developing and managing a practice. So, don't delay! Send in your articles and news items today ... **All submissions should be forwarded to: Bridget Jurich, SIG Coordinator, at bjurich@naela.com.**



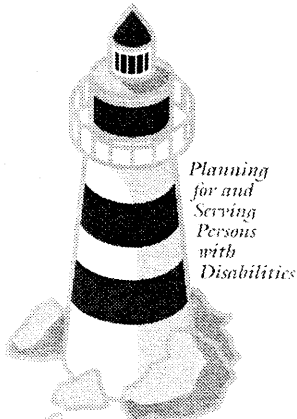
Tips/Tools/Lists/ Articles Wanted!

What did you learn lately? Share your resources.

- Do you use a simple and effective tool that you can share with your colleagues? Tell us about it.
- Do you regularly refer to the same resources? Jot down that list and send it in. Or, send in information on a new resource such as a website or organization
- Submit an article to the newsletter. Don't delay!

ALL CONTRIBUTIONS SHOULD BE
FORWARDED TO:

Bridget Jurich,
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Go to Carolina

2004 NAELA SYMPOSIUM

May 21-23 • Hilton Head, South Carolina

***The Practice Development/
Practice Management SIG is
proud to present:***

**“Top 20 Tips”
A Panel Breakfast
Discussion
Saturday, May 22, 2004
8:15 – 9:15 a.m.**

As a follow-up to their highly successful Institute breakfast where valuable pearls and gems were discussed, the SIG has compiled a “Top 20 Tips” list to discuss!

Please join this energetic panel discussion on how to meet your clients' needs and to improve and grow your practice!

NEW MEMBER SPOTLIGHT!

Please join us in welcoming our newest members to the PD/PM SIG. Be sure to check out who joined and lend a hand in supporting your fellow members!

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Welcome!

Networking Tip: The Elevator Introduction

by James M. Higgins, Jr., Esq.

Okay, I know I need to market and network. I understand this and even openly acknowledge how important it is to do these things in order to build a law practice, but sometimes I just plain don't want to. There was a time when I just outright hated networking, whether it was going to lunch, attending functions, serving on boards and projects or just rubbing elbows with the dirty mob: I even despised it when I knew there were solid opportunities at a specific event for meeting potential referral sources or clients. One of the main reasons for my reluctance was that I was so inept at answering that simple, daunting question: "What do you do?"

My response would usually resemble something along the following lines: "I am an Elder Law attorney. No, it doesn't mean that I'm old. I predominantly practice Elder Law. Elder Law includes Medicaid and Medicare, Asset Protection Planning, Estate Planning, Planning for Incapacity, Health Care Directives, Income & Gift Taxation, Wills & Trusts, Conservatorships and Decedents' Estates Administration. No thanks, my drink is still fine. Yes, it was nice meeting you, too. Do you have a card?" How awkward and boring was that? I often felt uncomfortable, even

foolish at times. I really hated it.

Last summer, my law firm hired a marketing consultant from Boston named **Stewart Hirsch**. One of the tools that Stewart gave us was the Elevator Introduction. An Elevator Introduction is telling people what you do by imagining that you're on an elevator with them and only have a ride of two or three floors to convey your message, about fifteen seconds. He then gave us three simple rules:

1. Keep to the elevator ride timeframe: **BE BRIEF**.
2. Describe what you do, not the area of the law you practice: **BE DESCRIPTIVE**.
3. Most importantly, *talk about how you help people*: **BE USEFUL**.

So now, I will probably say something like the following when I meet someone at a Chamber of Commerce meeting, at a wedding or wherever and am asked that dreaded question: "I'm an Elder Law attorney. I help older people find the best places to live and get the care they need, pay for nursing home bills and protect their money, decide who makes their important decisions and deal with Probate as best they can. I make a big difference in my clients' lives and can save them a lot of money, sometimes a

real lot of money. They really appreciate it and I really love it."

All in all, I don't know if I come across any better, but at least I don't feel as boring. If a connection is established (and it usually is), we end up talking about what types of problems I work on with people. It is a much more interesting icebreaker than discussing Revocable Living Trusts or Medicaid eligibility. When I turn around and ask about what they do for people, there is the possibility of a fairly interesting discussion from which I may develop a new resource. I really don't mind "the networking thing" as much anymore.

It is a fairly simple undertaking. Think about what it is that you do to help your clients. Don't concentrate on the documents that you draft or the planning you undertake. What is it that you DO for them, *from their perspective*? What services do you deliver to them or what problems do you solve for them? Next, work on how to express this without putting anyone to sleep and you're ready. Put some real time and effort in, remember the three rules and then give it a try. If you practice first on a spouse or a friend, you may be very surprised when their reaction is "I didn't know that's what you do!"

20 Tips from the 2004 UnProgram in Dallas

by Robert B. Fleming, CELA

1. Send your clients' advance directives to their primary care physicians, with a cover letter explaining who you are (although one participant reported that she had tried this for several years and never received any indication that the physicians noticed her involvement, so maybe there has to be a way to step up the visibility—in a later session, someone else suggested including a postage-paid postcard for the Dr. or staff to return, indicating that they had put the directive in their file).

2. With thank-you letters to referral sources, include a \$5 gift certificate to Starbucks (or a local movie house, or Borders).
3. At seminars offered to the public, give a door prize—a flower arrangement, for instance—as a way of getting those in attendance to provide their names and addresses.
4. Conduct initial interviews using a notebook computer rather than paper and pen. It speeds up the data collection aspect, and also makes you suddenly more mobile if you want to print documents in homes, hospitals

- or other settings. Some discussion ensued about how to make the notebook feel friendly and not come between you and clients, with the general consensus from those who use computers being that it was a non-issue.
5. Offer "Preparing for Widowhood" presentation to women's groups (it doesn't have to be quite so macabre as this short version sounds).

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20 Tips From The2004...

(continued from page 3)

6. Schedule office staff meetings to review and discuss a book like "Customer Service for Dummies" (which apparently is a good office management book—go figure) one chapter at a time. Assign reading to staff members in preparation for the sessions, and pick one person to lead the discussion on each topic.
7. "Just say no" to taking difficult clients. Some suggested quoting a much higher retainer or flat fee, but the group promptly shouted that idea down in favor of refusing the clients altogether.
8. As an icebreaker with new clients, get them to talk about themselves—start by asking what department they work in, or job title, or what they did before retirement.
9. Set expectations for both clients and staff by making a checklist of to-do items at the initial interview, and sharing that list with the new client as well as staff.
10. Put your website in a footer on your letterhead, where it will stand out and may generate more traffic. Include a reference to the website in your voicemail announcement.
11. Offer in-service sessions for hospital discharge planners. Bring food, and "theme" the sessions (e.g.: "comfort" and bring chicken soup, or "chocolate"). One excellent topical suggestion for in-service programs: HIPAA.
12. Take clients' pictures.
13. Send flowers to the community spouse after Medicaid eligibility has been obtained. In the case of husbands in the community, send along a note encouraging them to take the flowers to their wives in the nursing home.
14. Hook up with local financial planning groups who offer regular seminars. Once a month you can do a presentation on an elder law topic to their clients and your prospective clients.
15. Send seasonal thank-you gifts (candy, fruit, whatever) well in advance of the holiday season—maybe before Thanksgiving. It gets it out of the way and helps you to stand out among the holiday food baskets.
16. Keep good caseload/caseload data, and periodically reassess whether you shouldn't just eliminate your least-productive practice area.
17. When personalized thank-you messages come from clients (for flowers at the death of a spouse or family member, for example), mark out the senders' information for privacy reasons but then put the thank-you in an office "brag book" and put it out on the waiting room coffee table. Related idea: rather than flowers on death of a family member, send a small donation to the local Area Agency on Aging, or the Alzheimer's Association, or some appropriate charity. Related to that: one firm makes a regular quarterly contribution to an agency, and then sends notes to referral sources and family members that say "we have made a contribution to [charitable organization] in your honor" or similar.
18. When the final order discharging your client as Personal Representative is received, take the client to lunch. Thank them for their business and ask if there is anything else you can do for them.
19. Introduce yourself to the nursing home director, intake person, social worker, nursing director or appropriate person at each nursing home in your area, and ask for a tour of the facility. Offer to put on seminars for the billing office (or professional staff) on, for example, how to successfully transition patients from private pay to Medicaid.
20. Include detailed driving directions, parking instructions and office entry description with the client confirmation letter for initial appointments.
21. Buy a portable printer for home visits. You can prepare documents based on a phone consultation, send a draft by mail, and then visit with a printed version but make changes on the fly if need be to get it signed during that one home visit. Tips from the 2004 UnProgram in Dallas.doc



Mini-Pearls and Gems from the 2003 Dallas Institute

by James M. Higgins, Jr., Esq.

Those of us who were fortunate enough to attend the PD/PM SIG Breakfast on Sunday morning at the 2003 Dallas Institute were treated to more than a hot meal. Part of the program involved placing index cards on the tables so that all attendees could write down PD/PM tips that they found helpful in their practices. The cards were then collected and read aloud during breakfast so that everyone's ideas were disseminated. Additionally, a couple of members expanded on their nuggets at the microphone. It was a nifty way to pick up pointers ranging from very simple ("Use blue pens when signing documents") to more comprehensive ("Hire an Office Manager") ideas. The entire list (85 +/- entries) is posted on the NAELA website at the PD/PM SIG page if you'd like to inspect the same. Here are 20 of my personal favorites, along with a bonus (compliments of Dave Dorfman):

1. Block out one afternoon a week for emergency appointments or for squeezing in your loyal clients.
2. Whatever your best time of day to work, take no calls during that time.
3. Block time off on your calendar to work on those files you never find the time to do.
4. Use an easy-to-read font. Go no smaller than 12 points. Arian and Courier are the best.
5. Keep Halls Menthololypus on hand. If you are in an unpleasant smelling situation, pop the Halls in and it will take over your own sense of smell.
6. Get an amplifier or two from Radio Shack to use with clients who have hearing problems; get a large flat magnifier for clients with visual problems.
7. Make memorial donations for deceased clients to the NELF Scholarship Fund.
8. Send flowers or plants to clients on special occasions or when they lose a loved one.
9. Market to other attorneys.

10. Make available copies of all articles, pamphlets or whatever else you have written in your waiting room. Clients are impressed by someone who is published.
11. Market with the pre-needs planners in funeral homes in your area.
12. Follow up *personally* with people who left your office but did not retain you.
13. Prepare a note after each appointment summarizing the meeting and then listing what the attorney and client are to do next. Give a copy to the client.
14. After meeting and greeting clients, ask them if they had any trouble finding the office. Generally, the person answering the question is the decision maker.
15. When first meeting with prospective Medicaid clients, calculate the amount that you can save or protect. The use of numbers makes it easier for clients to understand the benefit of your services.
16. After discussing your fees with the family, find a reason to leave the room to give them an opportunity to talk privately. They may hire you right away if they can talk by themselves.
17. Use cybersecretaries for dictation. Accuracy is about 95% and product is returned to you within 30 minutes.
18. Hire more staff before you are in a crisis and really need to. Hire slow, fire fast.
19. Call holiday bonuses "Cash and Dash". Give bonuses out at noon and then give employees the rest of the day off.
20. Use experts: do not try to do everything yourself.
21. (BONUS) Cherish your pre-client time (that time before you become the client).

2004 Best of NAELA Series

Coming Soon via NAELA website @ www.naela.org

Practice Development/Practice Management

"Dynamic Practice Series"

1. Office Practice, Client Development
2000 Symposium
Julie Osterhout, CELA
2. Designing and Using Systems
2001 Symposium
Thomas D. Begley, Jr., CELA, Vincent J. Russo, CELA
3. Destination Paperless: Helping Technophobes Through the Hoops
2002 Symposium
Renee Lovelace, CELA, Ronald A. Fatoullah, CELA, Robert B. Fleming, CELA, Stephen J. Silverberg, CELA
4. The Power To Zapp: How to Lead Your Firm to Excellence
2002 Symposium
Thomas D. Begley, Jr., CELA, Vincent J. Russo, CELA
5. The Business of Law Practice
2002 Symposium
John G. Iezzi, CPA
6. The One Page Business Plan
2003 Symposium
Edward M. Phelps, Esq.



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Practice Development/Practice Management

"Marketing Plans Series"

1. Developing a Personalized and Effective Marketing Plan
NO MATERIALS PROVIDED –
TAPE ONLY
1998 Symposium
Thomas D. Begley, Jr., CELA, Geraldine E. Champion, CELA, Dennis J. Christensen, Esq., Charlie F. Robinson, Esq.
2. How To Market to Hospital SNFs & ALFs
2000 Institute
Peggy Taylor, B.S.W., N.H.A.
3. Word of Mouth Marketing Roundtable
2000 Institute
Jerry Wilson, CSP
4. NAELA Fellows Forum – Pearls and Gems: on Business Development
2002 Symposium
Lawrence E. Davidow, CELA, Robert B. Fleming, CELA, Julie Osterhout, CELA, Charles F. Robinson, Esq., Vincent J. Russo, CELA, Judith A. Stein, Esq.
5. Establishing Effective Fiduciary Relationships
2003 Symposium
Thomas D. Begley, III, CELA, Lee M. Holmes, CELA
6. Public Relations: Tips and Tools
2003 Symposium
Jane Skelton, Esq., Ronald A. Fatoullah, CELA, Bernard A. Krooks, CELA, Howard S. Krooks, CELA, Jihane K. Rohrbacker, G. Mark Shalloway, CELA

naela  **bulletin**

National Academy of Elder Law Attorneys

The NAELA E-Bulletin Is Here

Have you sent us your e-mail address yet?

This new NAELA member benefit gives you a weekly, substantive update on the very latest in elder law—simply by receiving one e-mail a week. Don't miss out on this unique opportunity!

**E-mail Celeste Wilson at czwilson@naela.com
to be added to the list of recipients-TODAY!**

JULIE OSTERHOUT PROVIDES TIPS ON MANAGING YOUR MEDICAID CASELOAD

By Thomas J. Murphy, Esq.

Last year, NAELA began a series of telephonic seminars dealing with common management issues that feature prominent NAELA members discussing their systems and approaches. **Thomas D. Begley, Jr.** presented at the first of these seminars. **Julie Osterhout, CELA** presented at the second seminar.

Julie's presentation explains, in considerable detail, how she and her staff process a client's case file that is engaging in Medicaid planning and/or submitting a Medicaid application. Her materials, which exceed 500 pages, includes every form or letter that her office uses in the Medicaid process. Julie's presentation covers everything from the client's first phone call to the closing of the file.

Julie is a strong proponent of the systems approach and delegation of duties that NAELA has been urging all of us to follow and implement. I was impressed by how much of the caseload is handled by Julie's staff rather than by Julie herself. From what I could tell, Julie's involvement with the client is largely limited to the first meeting. At that meeting, Julie analyzes the client's situation and options. The important decisions are made at that first meeting. Julie then notates in the file what needs to be done and assigns the file to her paralegal. From that point on, Julie's involvement is in reviewing the staff's work.

This, of course, is what all of us would like to be able to do and is easier said than done. But Julie and her paralegal, Tricia Winterstein, did a great job of walking us through her process. They explained what each form is and when it is used.

One reason why Julie can front-end her involvement with the client is due to how the client file is organized. All clients must bring in their completed questionnaire two days before the appointment with Julie. This includes all the supporting documentation. A copy of the questionnaire is in the materials. But even more important is the cover

letter that goes with the questionnaire, several versions of which are in the materials.

The cover letter accomplishes several important goals: (1) It has five bullet points that explain the goals that can be accomplished by retaining Julie. (2) It stresses the need to thoroughly complete the questionnaire. One nice touch is a one-page checklist of twenty documents that must be brought in – this makes the 20-page questionnaire appear much less daunting. The cover letter reminds the client to review the twenty-item checklist before they come in. I like this idea of a checklist because, even if the client does not completely fill out the questionnaire, the information that I need should be in these documents. (3) The cover letter gives the name and number of a staff person – and not the attorney – to call in the event of questions. And the letter refers to that staff person several times throughout the letter. This makes it clear from the outset to the clients that they are retaining a team to work on their case and not simply one attorney. (4) The cover letter reminds the client that there is a \$250 consultation fee and that three-fourths of any fee will be paid at that first meeting. I totally agree with Julie in charging a consultation fee. It is the single best management tool I have ever adopted since it weeds out the non-serious clients. It also gets the client in the proper mindset for the first meeting – come prepared to make important decisions, not the least of them being the payment of what-could-be a sizeable legal fee.

As mentioned earlier, the questionnaire is brought in two days before the first meeting. Copies of all the supporting documents are made with a reduction to 75% so that Julie can make notes in the margin. The file is then organized in an expandable file folder. Within this, each asset and income item has a separate folder to hold its documentation. The file is organized so that it corresponds in exact order to the Medicaid application. This organization of the file means that

Julie has everything she needs and knows where the information is when advising the client at the first meeting. Julie's system seems to hinge on this and justifiably so.

There are several items in Julie's questionnaire that I really like. It asks the client to disclose any medication they are taking rather than simply asking if the client's health is good. A client may be in good health but may be taking significant amounts or a variety of medications that may alert us to a potential problem or issue. If the client is making a bequest to a charity, the questionnaire tells the client to obtain an IRC 501(c)(3) letter from the charity. The questionnaire also asks about safe deposit boxes, which are often overlooked and can be a real headache in the event of death or incapacity.

Julie has the client make the important decisions at the first meeting. This is great if it can be done but, for most of us, this is usually done at a follow-up meeting. Many NAELA members do not want to appear to be pressuring clients into a decision at that first meeting and they want them to discuss the matter with family members. However, this can lead to procrastination by the client or to indecision due to conflicts within the family. Julie avoids this by insisting that at least one child be present at the meeting. This gives the client some reassurance that they are doing the right thing and it makes sure that at least one child understands the issues. And it gets the case moving.

The attorney's fee is agreed to at that meeting. Julie structures her fees in a unique way by having a minimum fee. Julie finds that quoting a flat fee, especially for a husband-and-wife situation, is not feasible. She has tried to flat-fee cases but found that the fee was never adequate. As a result, she periodically computes the amount of hours that she and her staff devote to a particular type of case. The average amount of those hours will serve as the baseline for the minimum fee for a given type of case. But the fee

agreement includes a provision that the client will be charged an hourly fee if the hours exceed that baseline figure. Julie says this has worked very well for her but she repeatedly urges that clients must be informed of the additional charges well before they are incurred. The materials have several letters to this effect.

With this in mind, the client signs a one-page, carbon-duplicate fee agreement at the first meeting. Julie collects three-fourths of the fee at that meeting with the balance due in thirty days. A more detailed statement of fees is later sent to the client.

At this meeting, Julie makes use of another carbon-duplicate form for a "Steps To Take" list, with one part stating what the client needs to do and another part indicating what the attorney needs to do. Julie has a five-page checklist of topics for her to cover at the first meeting. She also has a ten-page form that she returns to her staff. This form indicates which paragraphs should be included in the letter to the client explaining the estate planning (but not Medicaid) issues that will be addressed by Julie's firm. This letter explains the fee structure as well.

The next major step is drafting the Medicaid plan letter. This can be as long as – gulp! — 38 pages. I have noticed a distinct split with NAELA practitioners as to whether this should be done. I do not prepare one. My clients are not going to read such a lengthy letter. It is intimidating and does not simplify the client's predicament. Clients know they have a problem and only care about getting it solved. This letter only tells them what you will do, not what has already been done. This only reminds the client that the problem still exists and that you have not made it go away, or at least not yet. This is not what clients want to hear.

On the other hand, this letter reminds clients of how complicated Medicaid issues can be. Julie sends this letter to at least one child so that the children can see for themselves what is being done and why. And it is an effective "CYA" tool for the lawyer. None of this meant as a criticism of Julie's methods. I am simply noting that there is substantial disagreement among practitioners on this.

I was surprised to learn that Julie's staff drafts the Medicaid letter, although it is based on Julie's extensive notations in

the file. The letter discusses each asset and income item, the applicable rule and whether the asset will be counted. It states what documents were provided and any that need to be provided. Each asset and income item is given a number in the letter that stays with it for the remainder of the case. This makes it easier when talking with the client on the phone by referring to the number. This letter takes 8 to 12 hours for the staff to complete and for Julie to review. A two-hour meeting is then scheduled for a staff member to review the letter with the client and family.

One neat thing that Julie does is that she sends the client a three-ring binder once she has been retained. From that point on, all correspondence to the client is three-hole-punched for easy placement into the binder by the client who now has everything in one convenient place.

Once the Medicaid letter goes out, a seven-page checklist is generated for the staff. It details who is doing what. It is printed on blue paper for ease of access.

Julie provided us with all the various forms and letters that come into the planning process at this point – everything from assignments, to letters to IRA custodians, to personal service contracts to income-only trusts. One letter that caught many attendees' attention was a letter that Julie sends out to the family once the client has entered a care facility. With that letter, Julie encloses a complimentary copy of the book, "Nursing Homes: Getting Good Care There", published by the National Citizen's Coalition for Nursing Home Reform. (The book can be purchased for \$11.95 from the Coalition's website at www.nccnhr.org.)

Julie also emphasized the importance of maintaining contact with the care facility. If a Medicaid application will be filed, the bookkeeper of the care facility is sent a letter explaining the Medicaid process, to include the estimated amount of the client's share of cost and how it is computed as well as a timeframe as to when the application will be accepted.

The remainder of Julie's presentation covered the application process. Julie's approach is to make the Medicaid office's work as easy as possible. Not only is all of the supporting documentation provided and organized to correspond with the application form, but also Julie and her staff even do all of the computa-

tions (CSRA, MMMIA, etc.) and provide a summary of the results for a quick overview. For instance, there is a listing of all asset categories indicated on the Medicaid form with a "yes" or "no" next to each asset for both the applicant and the spouse. This is on a separate green sheet. A similar "yes/no" summary is done for each item of income.

When the application process is completed, a lengthy closing letter is prepared. It explains how much the client will pay each month, the assets that can be kept and how this was computed. Much of the information is imported from the initial plan letter. It discusses the services that will and will not be provided by the Medicaid agency. There is also a fairly lengthy explanation of the estate recovery program. Julie then has a one-hour meeting with the client and family, where she goes over the letter with them. They also discuss if there is any legal fee remaining to be paid and who should be the Medicaid representative from that point on. It is Julie's practice to have the client be the representative. A letter is prepared and sent to the Medicaid office indicating this. A copy of the closing letter is sent to any child who may want one.

I was pleased to see that Julie's system is very simple from a technological standpoint. These seem to be a series of documents simply linked together with a heavy use of global search-and-replace and stop codes. No need for a high-priced consultant to put this together!

Approximately 750 NAELA members phoned in to take part in the seminar. A two-hour audiotape of the seminar and a three-ring binder with 500 pages of materials is available from NAELA for \$125.00. They can be purchased through the NAELA store under Telephonic Program Materials on the NAELA website @ www.naela.org.

