



A Division of the New York Legal Assistance Group

**LegalHealth**  
Professional Partnership to Promote Well Being<sup>®</sup>

*This is general information, not legal advice. Patients should consult an attorney for specific guidance.*

## Preparing Your Patient For a Legal Referral

Please help your patients make the most out of his/her initial LegalHealth appointment by reviewing the following:

### Set expectations for patients you refer:

- Communicate to the patient why you are giving them this referral.
- Explain that the first appointment with the lawyer is to gather information and identify the legal issue.
- Explain that patients are not guaranteed representation, but rather that the attorney will evaluate the legal issue(s) to determine the nature of the matter, what are the remedies and whether s/he would benefit from legal representation.
- Assure the patient that the legal appointment is a confidential meeting, and the attorney will not speak with anyone outside of NYLAG without consent.

### Limitations:

- ◆ Patients must have capacity to be referred for legal services.
  - If questionable, the lawyer can assess the capacity for legal purposes.
  - The lawyer cannot just meet with a family member unless that family member is a Power of Attorney for the patient.
- ◆ Patients must have well defined legal issues. *Although legal problems can be very stressful, attorneys are only qualified to handle legal matters during appointments.*
- ◆ If the patient is currently represented by another attorney, unless the patient is seeking a second opinion, the LegalHealth attorney will not advise or get involved.

### Steps to Take Before Legal Appointment:

- Encourage your patient to gather all relevant documents that relate to the legal matter, and bring those documents to the first appointment.
- If a patient's legal question relates to a denial or reduction in benefits, the patient should request a Fair Hearing immediately and in advance of the legal appointment. If the hearing date is assigned BEFORE the clinic appointment, they can request an adjournment while they are seeking the assistance of an attorney.

### Confidentiality:

- Lawyers have a duty of confidentiality and cannot report back to healthcare professionals without client consent.

More questions? Refer patients for an appointment with a LegalHealth attorney

[www.legalhealth.org](http://www.legalhealth.org)

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