

PHONE CALL CHECKLIST

You can best help callers by preparing yourself and getting some things organized.

1

PREPARE YOURSELF

- Go to a quiet room where you can have a private conversation.
- Review the difference between legal advice and legal information.
- Remind yourself of your role as a Navigator.

2

ORGANIZE YOUR RESOURCES

- Open the Personal Directive App on your phone or computer.
- Open up the LISNS web page with their resources.
- Have a copy of the Reflection Guide nearby in case you need to look something up.
- Have a copy of the instructions for filling out the personal directive form.

3

SET THE STAGE FOR CALLERS

- Remind callers about LISNS' commitment to privacy and confidentiality and ask them to only share information that is needed to complete their personal directive.
- Explain your role as a Seniors' Legal Info Navigator and that you can give them legal information, not advice.
- Refer callers to LISNS for help if they need more than you can give them.
(www.legalinfo.org/how-lisns-can-help/i-want-to-ask-a-legal-question#ask-a-legal-question-by-telephone)