Tips for Handling Phone Interviews

1. **Set expectations**

When you introduce yourself, let the client know that you are volunteering and that you are not representing the applicant. If the applicant has any questions about their application should be directed to the HVL staff main phone line.

Let the applicant know that if the quality of the sound makes it difficult to communicate, you may have to try calling the applicant’s cell phone again to check if reception improves. The applicant may need to get to a nearby area with better reception.

You may also need to ask the applicant to stop driving while they take the call.

2. **Maintain confidentiality**

Ask whether the applicant is in a safe location and if they feel comfortable talking over the phone. If the applicant is interrupted by someone entering their space, ask the applicant to select a location where they will get some privacy because you will not be sharing the things the applicant is sharing with you.

3. **Rephrase**

If you asked a question and the applicant is explaining something else, but has not answered the question try asking the question again. You may need to ask the question in a different way in case the applicant did not understand the question. Phone calls can be more challenging without the cues provided through eye-contact and body language. Even moments of silence may seem awkward, but be sure to check in with the applicant and ask if they are okay.
DOs:

- **DO** limit your time to approximately 35-40 minutes per applicant.

- **DO** complete the questionnaire and add any additional notes you think is relevant. Please answer all of the questions or mark “N/A” if not applicable. You are gathering facts to allow HVL (1) to assess the merit of each case and (2) to prepare the case for further representation, if accepted. This is the **intake** part of the clinic.

- **DO** give legal advice! For many of the applicants this may be the only time they will meet with an attorney. This is the **legal advice** part of the clinic. **DO** write down the legal advice that you provide the applicant.

  - **ALWAYS** include the following language: “I advised applicant on legal alternatives regarding [e.g., guardianship].” This is in addition to whatever other notes you make.

- **DO** check the box at the bottom of the Attorney Notes page if you are interested in taking on a particular case for extended representation, but **DO NOT** tell the applicant you have done so.

- **DO** call the staff attorney mentors if you have a question or need help. HVL staff attorneys are here to help.

DON’Ts

- **DON’T** provide applicants with your last name or other identifying information.

- **DON’T** tell the applicant whether you think HVL will accept their case. HVL reviews each case individually and informs applicants via letter within 10 days.

- **DON’T** let applicants allow other family members to sit in on the interview. There are privileges to protect. HVL has Spanish-language translators and access to Language Lines, if needed.