

**THE MICHIGAN JUDICIAL INSTITUTE  
WELCOMES YOU TO THE...**

**Serving the Self-Represented Person Seminar**

March 2 & 3, 2006  
9:00 am – 12:00 pm

47<sup>th</sup> District Court  
Farmington Hills, Michigan

Mr. Keith Beasley, Court Administrator  
Ms. Donna Beaudet, Court Administrator  
Ms. Jeanne Takenaga, Probate Register  
Mr. David Walsh, Court Administrator



**MICHIGAN JUDICIAL INSTITUTE**  
Michigan Hall of Justice  
P.O. Box 30205  
Lansing, Michigan 48909  
(517) 373-7171  
<http://courts.michigan.gov/mji>

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## **KEITH BEASLEY**

Mr. Beasley has been Court Administrator of the Macomb County Circuit Court since 1992. Previously, he was Chief of Macomb Circuit's Research Department. He practiced law in Mt. Clemens and clerked for the Michigan Court of Appeals. He has a Juris Doctor from the Detroit College of Law and a Master's Degree in Corporation and Finance Law from Wayne State University Law School. He is a member of the National Association of Court Managers and the Michigan Association of Circuit Court Administrators.

Mr. Keith R. Beasley, J.D.  
Court Administrator  
Macomb County Circuit Court  
40 N. Main St.  
Mt. Clemens, MI 48043  
586-469-5166

[Keith.Beasley@macombcountymi.gov](mailto:Keith.Beasley@macombcountymi.gov)

## **DONNA BEAUDET**

Donna Beudet is the court administrator of the 46<sup>th</sup> District Court in Southfield, Michigan. She was appointed to her current position in 1987 after serving as Deputy Court Administrator for the previous four years.

Ms. Beudet has a Bachelor of Arts Degree from University of Norte Dame and a Master of Science degree in Criminal Justice from Michigan State University.

Ms. Beudet is past-president of the Michigan Court Administration Association and a past-president of the Southeastern Michigan Court Administrators Association. She also received the Michigan Court Administration's 1992 Outstanding Achievement Award. She has published nationally and has presented training on a national, state, and local level.

Ms. Beudet is a member of the National Association of Court Administration and currently serves on numerous state and local committees, including:

- Michigan Supreme Court's Technical Advisory Group
- Michigan Court Administration Association's Legislative Committee
- Michigan Judicial Institute's Advisory Board
- Michigan Justice Project
- Michigan Court Support Staff Training Consortium
- State Court Information System Advisory Committee
- Michigan Supreme Court Dispute Resolution Task Force

Ms. Donna Beudet  
Court Administrator  
46<sup>th</sup> District Court  
26000 Evergreen Road  
PO Box 2055  
Southfield, MI 48037-2055  
248-354-9506  
[beudetd@voyager.net](mailto:beudetd@voyager.net)

## **JEANNE TAKENAGA**

Jeanne Takenaga is the Probate Register of the Wayne County Probate Court in Detroit, Michigan. She has been in her current position since 1990 and took on the additional responsibility of Director of Personnel and Labor Relations in 2002. She previously served as a Probate Analyst for the State Court Administrative Office from 1988 to 1990, and as a Court Attorney for the Wayne County Probate Court from 1985 to 1988.

Ms. Takenaga is a member and past-president of the Michigan Probate and Juvenile Registers Associations. She is also a member and the Education Chair of the Wayne County Probate Bar Association.

Ms. Takenaga obtained her J.D. from the Detroit College of Law in 1985.

Ms. Jeanne Takenaga, J.D.  
Wayne County Probate Court  
Coleman A. Young Municipal Center  
2 Woodward Avenue RM #1305  
Detroit, MI 48226  
313-224-5725  
[pctakjea@probatewayneco.org](mailto:pctakjea@probatewayneco.org)

## **DAVID WALSH**

Dave Walsh is the court administrator for the 47<sup>th</sup> District Court in Farmington Hills, Michigan and has 18 years of administrative experience in limited and general jurisdiction courts. He is a Fellow of the Institute for Court Management and holds a Bachelor's Degree in Political Science and a Master's Degree in Public Administration from Eastern Michigan University. In 2003, Mr. Walsh was honored as *Court Administrator of the Year* by the Michigan Court Administration Association. He is the chairperson for the annual Michigan Court Managers Conference, having served in that role since 2002. From 1994 - 1998, he was co-chair of the Michigan Court Support Personnel Training Consortium. With colleague Donna Beaudet, he has facilitated training on the topic of legal advice for the Nevada Clerks Association and the Mid-Atlantic Association for Court Management. In 1998, their article on developing legal advice training for court support staff was featured in *The Court Manager*.

Mr. David Walsh  
Court Administrator  
47<sup>th</sup> District Court  
31605 W. Eleven Mile Road  
Farmington Hills, MI 48336  
248-871-2973  
[DWalsh@ci.farmington-hills.mi.us](mailto:DWalsh@ci.farmington-hills.mi.us)

# Serving the Self-Represented Person

Presented by the Michigan Judicial Institute

## Faculty

Keith Beasley, 16th Circuit Court

Donna Beaudet, 46th District Court

Jeanne Takenaga, Wayne County Probate Court

Dave Walsh, 47th District Court

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## 4 Objectives for Today's Seminar

- Recognize and overcome stereotypes about self-represented people.
- Identify tools for better serving the self-represented persons.
- Identify the difference between providing information and the unauthorized practice of law.
- Understand how to explain the policies and procedures of the judicial system without practicing law.

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## Who are the self-represented?

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## True or False

20% of the persons who represent themselves really can't afford a lawyer.

Self-represented persons are older than those represented by a lawyer.

Cases with self-represented persons are likely to take less time to complete.

Self-represented persons are more satisfied with the judges than those represented by attorneys.

Nearly half of self-represented persons think the case is simple and they can do it themselves.

Source: ABA Summary of 1991 Maricopa County (Phoenix, AZ) Study of Self-Represented Persons in Divorce Court.

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## Roles and Responsibilities of Court Staff

- Provide accurate information
- Provide access to the court system
- Provide customer service
- Increase the public's understanding and knowledge of the court system
- Increase the public's trust and confidence in the administration of justice

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**BY LAW,  
COURT CLERKS  
CANNOT GIVE  
LEGAL ADVICE**



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## Reasons Why Court Employees Cannot Provide Legal Advice

**Impartiality:** Court employees have an "absolute duty of impartiality". A court employee can never give advice or information for the purpose of favoring one court user over another.

**Neutrality:** Court employees must remain neutral and cannot make judgments about what is in a litigant's best interest - only the litigant and his/her lawyer may do so. A court employee should not advise court users as to which remedies to seek or whether to avail themselves of a particular procedure or alternative.

**Unauthorized practice of law:** Every state has laws prohibiting the unauthorized practice of law. Only attorneys licensed by the state are permitted to practice law and give legal advice. Even if a court employee is an attorney, he/she still cannot provide legal advice because it would violate the concepts of impartiality and neutrality outlined above.

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## Legal Advice Guidelines

**DO:**

Provide legal and procedural definitions

Cite statutes, court rules and ordinances

Provide public case information

Provide general information on court operations

Provide options

Provide general referrals

Provide instructions on how to complete forms

**DO NOT:**

Provide legal interpretations and procedural advice

Research statutes, court rules and ordinances

Provide confidential case information

Provide confidential, ex parte or restricted information on court operations

Provide opinions

Provide subjective or biased referrals

Fill out forms for a party

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## ESTATES AND PROTECTED INDIVIDUALS CODE (EXCERPT) Act 386 of 1998

### MCL 700.1211

#### Court personnel prohibited from providing legal advice

Court personnel shall not provide or offer to provide legal advice or legal counsel to a fiduciary or an interested person and shall not complete a form, petition, or document for a fiduciary or interested person. This section does not prohibit the court from providing general information, blank forms, and information concerning the preparation of a form provided by the court.

**History:** 1998, Act 386, Eff. Apr. 1, 2000

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## General Strategies for Providing Better Service

- Listen closely and ask questions
- Be patient
- Explain the reasons
- Do not use "legal advice" as an excuse not to provide service
- Remember it's not just what you say, it's how you say it
- Do not make value judgments about who needs information

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## Serving Emotional Clients



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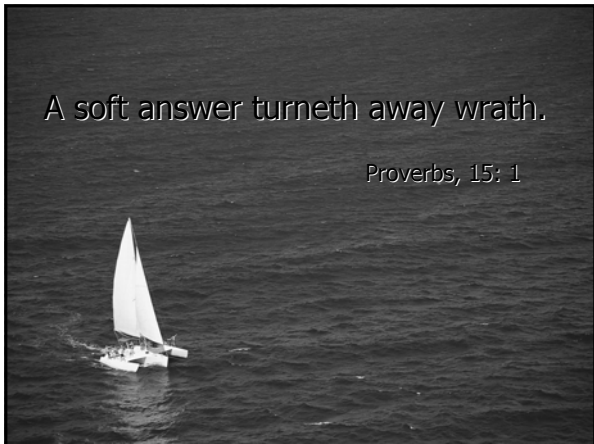
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A soft answer turneth away wrath.

Proverbs, 15: 1



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## Why do the Self-Represented Become Angry?

- They are in trouble
- May be required to pay money
- Have to wait
- They feel lost
- May be facing court battles
- They feel helpless
- They have to deal with people they'd rather not

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## What NOT to Do with Angry People

- Don't take it personally
- Don't argue
- Don't accuse
- Don't raise your voice
- Don't insult or name-call
- Don't try to win an argument
- Don't point your finger
- Don't use humor (includes sarcasm)
- Don't assume you know their motivation
- Don't assume a superior tone



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## Five Key Points About Anger

- Anger is just an emotion.
- It's OK for people to be angry.
- It would be more comfortable if people weren't angry.
- We cannot affect other's feelings.
- Expressing anger is a way to exert control.



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## Use Self-Awareness to Deal with Angry People

1. Recognize your own emotions and their effects on you.
2. Maintain control of your own emotions.
3. Control your response.

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## Step 1: Be Calm and Refocus

- Project calmness: stay quiet and relaxed
- Body language: sit up or stand up straight
- Smile
- Be an empathic listener
- Acknowledge the other person's feelings
- Offer help
- Stay on topic

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## Freeze Frame Technique

1. Take time out.
2. Shift your focus to something else such as your breathing.
3. Activate yourself with a positive, fun memory.
4. Listen to the client and your inner direction on how to defuse the situation.

From MJI Presentation by Byron Stock, "Emotional Intelligence: Keys to Managing Change Effectively".

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## Step 2: The HEAT Method

- Hear them out - venting
  - Listen to their story
- Empathize – acknowledge and respond to the person's emotions
- Ask and answer questions
- Take responsibility for assisting

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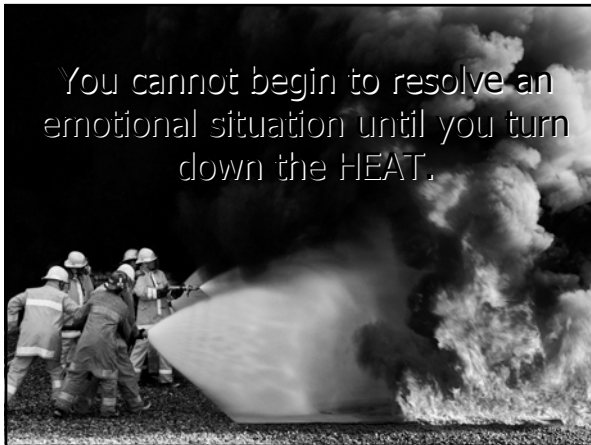
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You cannot begin to resolve an emotional situation until you turn down the HEAT.



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**The  
End**

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# Legal Advice for Court Employees Quick Reference

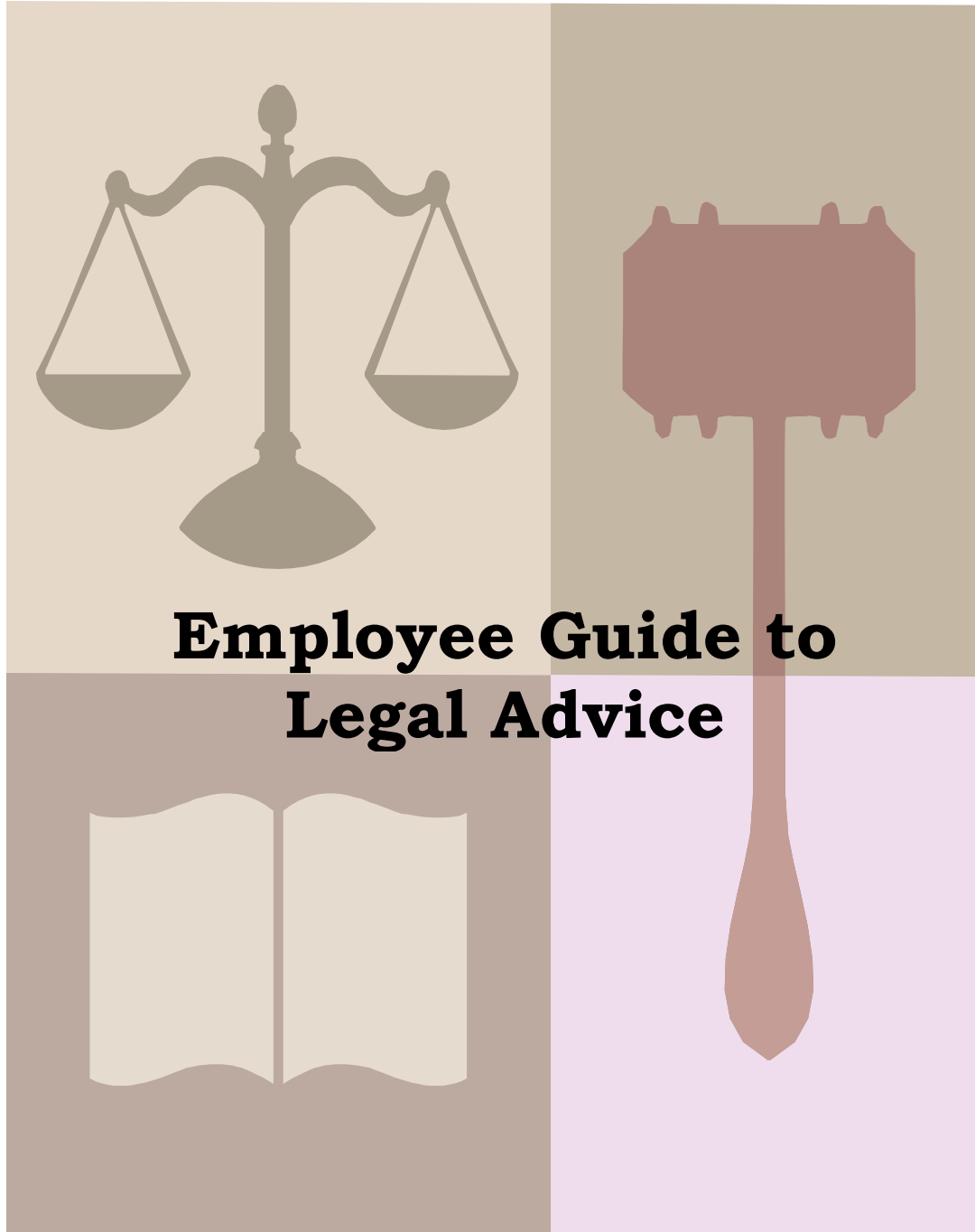
## CAN Provide:

## CANNOT Provide:

<b>Can provide legal <i>definitions</i></b>	<b>Cannot provide legal <i>interpretation</i></b>
<b>Reason:</b> Legal terminology can be confusing. Providing definitions of legal terms or procedures helps the public understand the court system and does not involve the unauthorized practice of law.	<b>Reason:</b> Court support staff cannot provide legal interpretations because it would be considered the unauthorized practice of law and would violate the concepts of neutrality and impartiality.
<b>Can provide <i>procedural definitions and explanations</i></b>	<b>Cannot provide <i>procedural advice</i></b>
<b>Reason:</b> Court procedures can be confusing. Explaining various procedures increases the public's understanding of the system and does not violate the concept of neutrality.	<b>Reason:</b> Court support staff cannot give procedural advice, because in doing so they may favor one party over another or may encourage or discourage a party from a particular course of action. You must remain impartial and neutral at all times. You can, however, point out various factors that individuals can consider to make the decision themselves.
<b>Can provide <i>cites for statutes, court rules and ordinances</i></b>	<b>Cannot provide <i>research of statutes, court rules and ordinances</i></b>
<b>Reason:</b> A court employee may cite the legal authority for a specific procedure.	<b>Reason:</b> You cannot research statutes, court rules and ordinances for parties because it would be considered the unauthorized practice of law and violates the concepts of impartiality and neutrality.
<b>Can provide <i>case information that is a matter of public record</i></b>	<b>Cannot provide <i>confidential case information</i></b>
<b>Reason:</b> Court support staff can provide case information that is public. Most court records are considered public records and, therefore, are available to the public.	<b>Reason:</b> Court support staff cannot disclose non-public or confidential information. It is very important that clerks understand what information is confidential.
<b>Can provide <i>general information about court operations</i></b>	<b>Cannot provide <i>confidential information about court operations</i></b>
<b>Reason:</b> Court employees have considerable knowledge and information about how a court functions. Sharing this knowledge of general court operations is not considered legal advice.	<b>Reason:</b> Court employees cannot disclose confidential information about court operations or ex parte communications because it can give one side an unfair advantage.
<b>Can provide <i>options</i></b>	<b>Cannot provide <i>opinions</i></b>
<b>Reason:</b> You can provide information on the various procedural options available and can explain how to do something.	<b>Reason:</b> You cannot give an opinion on or otherwise advise parties to use a particular procedure or remedy.
<b>Can <i>facilitate access</i></b>	<b>Cannot <i>deny or discourage access, nor encourage litigation</i></b>
<b>Reason:</b> Most people are not familiar with the court system. They often cannot describe their problem in legal terms. Court staff are gatekeepers to the system. It is their job to ensure that the court system is accessible.	<b>Reason:</b> Most people are not familiar with court procedures or terminology. Legal advice should not be used as an excuse not to provide service. If the question is not asked in the right way, take the time to clarify what is being asked.
<b>Can provide <i>general referrals</i></b>	<b>Cannot provide <i>subjective or biased referrals</i></b>
<b>Reason:</b> General referrals can be made to agencies and associations that can provide additional information and assistance.	<b>Reason:</b> Employees of the court must remain neutral and impartial and cannot make referrals to specific individuals.
<b>Can <i>distribute forms and instructions on how to complete forms</i></b>	<b>Cannot <i>fill out forms unless there is a handicap or physical disability that prevents the person from filling out the form</i></b>
<b>Reason:</b> Court employees must facilitate access to the court system.	<b>Reason:</b> Court employees should not fill out forms for parties because it violates the principles of neutrality and impartiality. However, there may be some situations where it is appropriate for clerks to record information on a form. Some examples include language barriers (illiteracy or foreign language) and physical handicaps (blindness or deafness).







# **Employee Guide to Legal Advice**

Michigan Judicial Institute  
P O Box 30205  
Lansing, MI 48909  
517-373-7171  
[www.courts.michigan.gov/mji/](http://www.courts.michigan.gov/mji/)

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# *Employee Guide to Legal Advice*

NOTE: The content of this training is available on-line at:

[www.courts.mi.gov/mji](http://www.courts.mi.gov/mji)

Click on “Resources”

Click on “Web-Based Training”

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## **Introduction**

Every day many court employees in every court in every state are bombarded with questions about courts, procedures, judges and cases. Most court employees have been told they cannot give legal advice when answering questions. Many courts have posted signs informing the public that employees of the court are not allowed to give legal advice. And probably every court support employee in every court in every state has, at one time or another, repeated the phrase, "I'm sorry. I'm not allowed to give legal advice."

Do you know what information can be provided and what information would be considered legal advice?

- Can you tell parties whom they should sue?
- Can you tell a party what form to use?
- Can you tell parties what their options are?

If you don't know the answers, don't worry because you are not alone. Court support staff in courts across the country have questions about what is and isn't legal advice.

## **Purpose Of This Training**

This training is designed to help court staff understand the types of information they can provide. It is specifically designed for court support staff who provide telephone and counter assistance as a major part of their job duties.

This training will cover three areas:

- 1) The reasons court support staff cannot provide legal advice;
- 2) Guidelines for determining what is and is not legal advice; and
- 3) Commonly asked questions

## Why Court Employees Are Not Allowed to Give Legal Advice

Although court support employees are told that they cannot give legal advice, they usually do not know why. There are several reasons:

**Neutrality<sup>1</sup>:** Employees of the court must remain neutral and cannot promote or recommend a particular course of action. Even though a court support employee may have processed hundreds of similar types of cases, he or she is not in a position to know what is in a litigant's best interest. Only litigants or their attorneys can make that determination.

**Impartiality<sup>1</sup>:** Court employees have an "absolute duty of impartiality". A court employee can "never give advice or information for the purpose of favoring one court user over another." This is very important because court support staff have considerable knowledge about the way in which their court functions. That knowledge must be shared fairly and in a manner that does not involve the disclosure of confidential or ex parte communication. "Advising a party 'what to do' rather than 'how' a party might do what it has already decided crosses the line from impartiality to partiality, from providing permissible information to giving prohibited 'legal advice' or engaging in the unauthorized practice of law."

**Unauthorized practice of law:** Every state has laws prohibiting the unauthorized practice of law. Only attorneys licensed by the state are permitted to practice law and give legal advice. Since court support employees are generally not attorneys, they cannot give legal advice because giving legal advice is considered the unauthorized practice of law. If an employee of the court were an attorney, he or she should still not give legal advice because it would violate the concepts of neutrality and impartiality.

<sup>1</sup> *The Ethics Field Book: Tools for Trainers*, Cynthia Kelly Conlon, J.D., Ph.D. Funded by a grant from the State Justice Institute, ©American Judicature Society, 1995.

<sup>2</sup> *The Ethics Field Book: Tools for Trainers*, *ibid.*

## **The Importance of Understanding What Is and Is Not Legal Advice**

Every day court support employees are bombarded with questions about courts, procedures, judges, and cases. Their job involves providing information to the different people that request or require it, including the general public, attorneys, parties, legal secretaries and paralegals. Each has different levels of understanding and different needs. The court support staff must help all of them while staying impartial and neutral and without giving legal advice. How they respond to the questions they are asked affects how the public views the court system. How they respond will most certainly affect the attitude of the public during their court involvement. And, how they respond could affect the outcome of a case. An accurate understanding of this primary function makes it clear that it is important to know what is and is not legal advice.

1. **Providing Access:** Most people are not familiar with courts and court procedures and must depend to a large degree on court employees for information on the court system. As a result, you play a very important role as a “gatekeeper” providing access into the court system. If people do not know how to use the system and court employees do not tell them, they are being denied access.
2. **Providing Service:** An important duty of all court employees is to provide service to the public. Providing information is a very important part of providing service. Therefore, it is important to understand what information can be provided and what information cannot.
3. **Pro Per Litigation:** An increasing number of people are representing themselves and are not being represented by attorneys. The burden will fall on court support staff to be able to assist these parties without crossing the legal advice line.

## Guidelines for Determining What Is and Is Not Legal Advice

*“How do I know what is and isn’t considered legal advice?”*

This is perhaps the number one question asked by court employees, and there is no easy answer. Court support staff have a tremendous amount of knowledge about the court system and are supposed to provide information as part of their duties. But how are they supposed to know what information they can provide and what information they cannot? How can they know when they are crossing the invisible legal advice line?

Unfortunately there is never going to be a book or manual that clearly identifies every question asked and what questions can or cannot be answered. However, there are some very specific guidelines that can be used to help define the legal advice line.

**TABLE 1. Legal advice guidelines for court support staff**

### Can Provide

- Legal definitions
- Procedural definitions
- Cites of statutes, court rules and ordinances
- Public case information
- General information on court operations
- Options
- Access
- General referrals
- Forms and instructions on how to complete forms

### Cannot Provide

- Legal interpretations
- Procedural advice
- Research of statutes, court rules and ordinances
- Confidential case information
- Confidential or restricted information on court operations
- Opinions
- Deny access, discourage access or encourage litigation
- Subjective or biased referrals
- Fill out forms for a party

TABLE 2.

**Can provide legal *definitions***

**Reason:** Legal terminology can be confusing and difficult. Providing definitions of legal terms or procedures helps the public understand the court system and does not involve the unauthorized practice of law.

**Example:** What is child abuse?

**Response:** According to this dictionary of legal terms, child abuse is “the mistreatment of a minor by an adult legally responsible for the minor.”

**Tip:** *Resources for providing legal definitions include statutes, court rules and a dictionary of legal terms.*

**Cannot provide legal *interpretation***

**Reason:** Court employees cannot provide legal interpretations because it would be considered the unauthorized practice of law and would violate the concepts of neutrality and impartiality.

**Example:** My neighbors leave their kids home all day without supervision. Is that child abuse?

**Response:** I am not an attorney and cannot make a legal interpretation. However, I can refer you to someone that can help you.

<b>TABLE 3.</b>	
<b>Can provide <i>procedural definitions and explanations</i></b>	<b>Cannot provide <i>procedural advice</i></b>
<b>Reason:</b> Court procedures can be confusing. Explaining various procedures increases the public’s understanding of the system and does not violate the concept of neutrality.	<b>Reason:</b> Employees of the court cannot give procedural advice, because in doing so they may favor one party over another or may encourage or discourage a party from a particular course of action. Court employees must remain impartial and neutral at all times. They can, however, point out various factors that individuals can consider to make the decision themselves.
<b>Example:</b> What happens at an arraignment?	<b>Example:</b> Whom should I sue?
<b>Response:</b> The arraignment is the first appearance before the court. Defendants are notified of the charges and informed of their rights, including the right to an attorney, bond is set, and a plea may be entered.	<b>Response:</b> I cannot tell you whom to sue because I cannot give you legal advice. If you aren’t sure who to sue, who do you feel owes you the money?
<b>Tip:</b> <i>Whenever you hear the word “should”, it is a tip that you are being asked for advice.</i>	



TABLE 4.

**Can provide *cites for statutes, court rules and ordinances***

**Reason:** A court employee may cite the legal authority for a specific procedure.

**Example:** An employer asks if he/she has to file a disclosure with the court every time an employee's paycheck is garnished.

**Response:** No. The court rules only require a disclosure to be filed within 14 days after the date the writ was served.

**Tip:** *Have copies of court rules and most commonly used statutes available. In determining what is considered research, consider whether the material or information requested is something that should be known as a part of your job and whether the information is readily available or would require compilation.*

**Cannot provide *research of statutes, court rules and ordinances***

**Reason:** Court support staff cannot research statutes, court rules and ordinances for parties because it would be considered the unauthorized practice of law and violates the concepts of impartiality and neutrality.

**Example:** Please provide me with a copy of all of the laws regarding stalking.

**Response:** I'm sorry, but I am not allowed to do legal research.

<b>TABLE 5.</b>	
<b>Can provide case information that is a matter of public record</b>	<b>Cannot provide confidential case information</b>
<b>Reason:</b> You can provide case information that is public. Most court records are considered public records and, therefore, are available to the public.	<b>Reason:</b> You cannot disclose non-public or confidential information. It is very important to understand what information is confidential.
<b>Example:</b> Is there an estate file open for Beth Hall?	<b>Example:</b> May I see the Kramer adoption file?
<b>Response:</b> Yes, there is. It is a public record. Would you like to see it?	<b>Response:</b> Since adoption files are non-public, they cannot be reviewed by the public.
<p><b>Tip:</b> <i>If asked about a confidential file, you should respond by saying that “no public record exists”.</i></p> <p><b>Note:</b> <i>If you are not sure which records are public and which records are confidential in your court, check with your supervisor.</i></p>	

<b>TABLE 6.</b>	
<b>Can provide <i>general information about court operations</i></b>	<b>Cannot provide <i>confidential information about court operations</i></b>
<b>Reason:</b> Court support staff have considerable knowledge and information about how a court functions. Sharing this knowledge of general court operations is not considered legal advice.	<b>Reason:</b> You cannot disclose confidential information about court operations or ex parte communications because it can give one side an unfair advantage.
<b>Example:</b> How long before I become the guardian?	<b>Example:</b> How do I get a particular judge assigned to my case?
<b>Response:</b> Hearings generally are scheduled in four to six weeks, and a determination is made at that time.	<b>Response:</b> I'm sorry, I can't give you information about the court's internal assignment procedures.
<b>Tip:</b> <i>Is the information sought for the purpose of having knowledge of the court's policies and/or procedures, or is the client hoping to get an advantage through the information? For example, if parties have confidential information about a court's case assignment procedures, they could "judge shop".</i>	

<b>TABLE 7.</b>	
<b>Can provide <i>options</i></b>	<b>Cannot provide <i>opinions</i></b>
<b>Reason:</b> Employees of the court can provide information on the various procedural options available and can explain how to do something.	<b>Reason:</b> Court staff cannot give an opinion on or otherwise advise parties to use a particular procedure or remedy.
<b>Example:</b> How can I collect my judgment?	<b>Example:</b> Should I file a writ of garnishment or a writ of execution?
<b>Response:</b> You have several options. If you know where the defendant is employed or has a bank account, you can file a writ of garnishment. If you know of property that they own, you can file a writ of execution. Otherwise, you can file a discovery subpoena to determine what assets, if any, they have.	<b>Response:</b> I can explain the difference between the two types of writs, but I cannot tell you what to do or give you an opinion on which option to select. That's a decision you have to make.
<b>Tip:</b> <i>Telling someone "how" to do something does not usually cross the legal advice line. Telling someone what he/she "should" do, does cross the legal advice line.</i>	

<b>TABLE 8.</b>	
<b>Can facilitate access</b>	<b>Cannot deny or discourage access, nor encourage litigation</b>
<b>Reason:</b> Most people are not familiar with the court system. They often cannot describe their problem in legal terms. You are the gatekeeper to the system. It is your job to ensure that the court system is accessible. The information that is presented, and the manner in which it is presented, can affect how accessible the system is.	<b>Reason:</b> Most people are not familiar with court procedures or terminology. Legal advice should not be used as an excuse not to provide service. If the question is not asked in the right way, take the time to clarify what is being asked.
<b>Example:</b> How do I <i>convict</i> my renter?	<b>Example:</b> How do I take care of a civil <i>infection</i> ?
<b>Response:</b> Do you want to evict your renter? The court that handles landlord/tenant disputes is down the hall.	<b>Example:</b> Civil infections are handled by the health department.
<b>Tip:</b> <i>In the examples above, the client was using incorrect terminology. Often it is necessary for a court employee to ask questions to determine what the client is really asking rather than make an inappropriate referral.</i>	

<b>TABLE 9.</b>	
<b>Can provide <i>general referrals</i></b>	<b>Cannot provide <i>subjective or biased referrals</i></b>
<b>Reason:</b> General referrals can be made to agencies and associations that can provide additional information and assistance. Sometimes people call the court when they don't know whom to call.	<b>Reason:</b> You must remain neutral and impartial and cannot make referrals to specific individuals.
<b>Example:</b> I'm not sure I'm calling the right place, but I need to talk to someone about my birth certificate.	<b>Example:</b> Can you give me the name of a good criminal attorney?
<b>Response:</b> Let me give you the phone number for the county records division.	<b>Response:</b> I can't refer you to a specific attorney, but you might want to check the yellow pages. Some attorneys list their areas of specialty there.
<b>Tip:</b> <i>Good general referrals include yellow pages and local bar associations.</i>	

TABLE 10.	
<b>Can distribute forms and instructions on how to complete forms</b>	<b>Cannot fill out forms <u>unless there is a handicap or physical disability that prevents the person from filling out the form</u></b>
<b>Response:</b> Employees of the court must facilitate access to the court system.	<b>Response:</b> Court support staff should not fill out forms for parties because it violates the principles of neutrality and impartiality.  However, there may be some situations where it is appropriate for you to record information on a form. Some examples include language barriers (illiteracy or foreign language) and physical handicaps (blindness or deafness).

**Tip:** *The following is a recommendation for handling exceptional situations:*

1. Exhaust all other possibilities first. Is there someone with them who can assist? Is there a literacy council that provides volunteers, or is an interpreter available?
2. If there are no other alternatives, you must record exactly what is said, confirm the information with the party, make a notation on the document, and have the party sign the form.
3. If possible, it is recommended that a witness, such as another court employee, be present.

**Note:** This is a very difficult issue. Although courts have an obligation to facilitate access and are required under the Americans with Disabilities Act to accommodate individuals with disabilities, courts also have an obligation to remain neutral and impartial.

## Conclusion

When court employees realize that most of the questions they are asked fall into the nine categories we have discussed, it is much easier for them to accurately draw the “legal advice” line and understand what is and what is not legal advice. With that understanding, court support staff can provide access to the courts and service to the public while remaining impartial and neutral.

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# Notes: