

A Tale of Two Paralegals!

Written by Jennifer Masse, RN, BSN, MBA, CNLCP

As a Nurse Life Care Planner, I speak to paralegals on a daily basis. If you are someone who loves to juggle a thousand things at once, it seems to be the perfect job for you! Through these connections, I have learned that paralegals have a direct effect on the outcomes of the cases I work on, including the quality and cost of my reports. A Life Care Planner reviews medical and billing records, formulates chronologies, interviews clients, and creates reports that project future medical costs. This requires the Life Care Planner to obtain past and current medical records/billing, have contact with the client, and understand the expectations of the attorney, including important dates (e.g., mediation/depositions/etc.).

This leads me to a paralegal named Brandy. Brandy is an extremely kind paralegal at a medium-sized firm. I was assigned a case from her office and reached out via email to introduce myself. After a week, I emailed again and called the office to request records. As I stated, Brandy was extremely kind and assured me she would

get the records sent over as soon as possible. The following week, I received three PDF files labeled with random letters that consisted of over 600 pages of medical and billing records. It took me over two hours to organize them and see what I had to work with before I could start to formulate a plan. Once organized (into medical records vs. billing, separated by office/entity), I realized the records were all at least a year old. More phone calls and emails followed to request updated records, only half of which were received over the course of the following four to six weeks. After three phone calls to the client for an intake interview with no response, I again reached out to Brandy for assistance. Two weeks and two more emails passed before I was finally able to connect with the client. Every time I reached out to Brandy, she was kind and accommodating. Yet when my report was finally submitted on the agreed upon date due to mediation, a minimum of five additional hours of time was billed for records review and extraneous communications, and the work product included record and billing areas marked “pending.”

Now let us meet Hope. Hope is also a paralegal at a medium-sized firm. After getting assigned a case with an attorney she supports, I emailed my usual introduction email. An immediate response followed. When I called to request records, she was ready with a link where – to my delight – everything was organized by office/entity and by office notes/billing. Upon initial review, one office lacked updated records – which were provided weeks later, but with Hope’s consistent updates on where she was with getting them. It is too bad we cannot control how soon offices release records! When I asked about giving the heads-up to the client, Hope assured me it was already done and provided an email address, should the client not answer the phone. When I wrapped up this report, I felt confident I had all the information needed to provide a solid work product for the attorney and client on an efficient timetable.

Paralegals are powerful, and their work has a ripple effect. Engagement, communication, and organization are the key differences between these two stories. When one cares about what they do, the investment in returning communications, staying organized, and truly partnering with those that are working on a client’s case becomes apparent. Think of your last few phone calls – I bet you could tell me whether the

person you spoke with was engaged in what they do. I have found it a good practice to ask myself regularly not only “How am I showing up?” but “When am I showing up?”. Do those that email you know you received their communication? Do those that have left voicemails know you have listened to their message? What is your process or system or workflow? And would you like an extra hour in the day? I know I would. There is a direct correlation with having a system/staying organized and efficiency. The utilization of white boards, planners, binders, to-do lists, setting phone alarms, or using Outlook calendars can be the secret sauce in staying organized, as there is no one-size-fits-all solution. I have found that my processes are constantly evolving, as is the world around us.

Paralegals are powerful, and your work affects the bottom line for not only your client, but your firm.



Jennifer Masse, RN, BSN, MBA, CNLCP, has been a registered nurse for almost 20 years, with experience in telemetry, neurosurgical ICU, research, OR, and dialysis. She obtained her MBA and transitioned to a management and strategy/growth position, and after eight years in the corporate world, decided to step into something new. She entered into the world of cost projections and Life Care Planning in late 2018 and has found not only a fulfilling profession but perfect niche for her skill set.

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