

A2J Author[®] Online Intake Series

Part I: Intro to Online Intake with A2J Author[®]

Intro to Online Intake with A2J Author[®]

Agenda

1. Online Intake with A2J Author[®]
2. Online Intake Process
3. Benefits of Online Intake
4. Concerns
5. How to Implement Online Intake with A2J Author[®]
6. Additional Resources



Online Intake with A2J Author®

Programs using A2J Author® for Online Intake

- 10 programs with online intake projects
 - Indiana Legal Services
 - Iowa Legal Aid
 - Legal Aid of North Carolina
 - Legal Aid of Western Ohio
 - Minnesota Legal Services Coalition
 - Pine Tree Legal Assistance (Maine)
 - South Carolina Legal Services
 - Southwest Virginia Legal Aid Society
 - Statewide Legal Services of Connecticut
 - Utah Legal Services

- 35+ programs researching for future online intake projects using A2J Author®



Online Intake with A2J Author®

Advocates for Basic Legal Equality, Inc. **Legal Aid of Western Ohio, Inc.**

Together, we do the community justice.

BACK NEXT MY PROGRESS 1 Welcome! You can apply for help from Legal Aid Line of

a2j Access To Justice
AT CHICAGO-KENT COLLEGE OF LAW

Welcome! You can apply for help from Legal Aid Line of Western Ohio by answering the questions in this interview.

Click "Begin" to start.

Begin

LEGAL AID LINE OF WESTERN OHIO

SJI This program was developed under grants from the State Justice Institute (SJI) grant number SJI-04-M-1211, Center for Access to the Courts through Technology, Chicago Kent College of Law, Center for Computer-Assisted Legal Instruction (CALLI), and Legal Services Corporation (LSC). The points of view expressed are those of the authors and do not necessarily represent the official position or policies of the SJI, Center for Access to the Courts through Technology, Chicago-Kent, CALLI or the LSC.

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What does an A2J Author® online intake interview look like?

Legal Aid of Western Ohio Example

Online Intake Process

Typical document assembly project with A2J Author

Access To Justice
#1 (DOMESTIC RELATIONS DIVISION)

Hello. This interview will help you complete court forms.

To get started, please enter your name and select your gender.

First:
Middle:
Last:
Gender: Male Female

ACCESS TO JUSTICE

Submit

Interview
Answers
(.anx
File)

HotDocs reads the answer file and inserts data in the correct location on the form.

Domestic Relations Cover Sheet (Rev. 6/19/99) CCDR 0601

IN THE CIRCUIT COURT OF COOK COUNTY, ILLINOIS
COUNTY DEPARTMENT - DOMESTIC RELATIONS DIVISION

IN RE: PETITIONER NO. _____
AND _____ CALENDAR
 RESPONDENT

DOMESTIC RELATIONS COVER SHEET

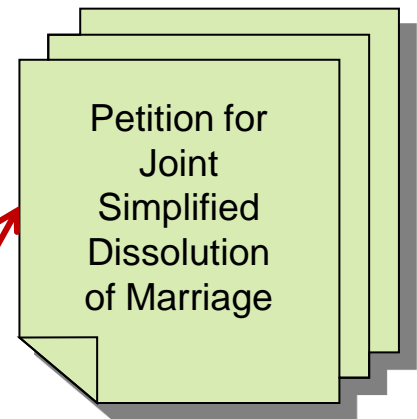
A Domestic Relations Cover Sheet shall accompany the initial pleading in all actions filed in the Domestic Relations Division. The information contained herein is for administrative purposes only and shall not be introduced into evidence. Please check the box designating the category which best describes the action to be filed.

GENERAL PROCEEDINGS

| | | |
|--------|-------------------------------------|---|
| A 0917 | <input checked="" type="checkbox"/> | Petition for Dissolution of Marriage |
| B 0918 | <input checked="" type="checkbox"/> | Petition for Legal Separation |
| C 0901 | <input checked="" type="checkbox"/> | Petition for Dissolution of Marriage |
| D 0903 | <input checked="" type="checkbox"/> | Petition for Legal Separation |
| E 0902 | <input checked="" type="checkbox"/> | Petition for Declaration of Invalidity of Marriage |
| F 0906 | <input checked="" type="checkbox"/> | Petition for Legal Separation or Alternative Dissolution of Marriage |
| G 0909 | <input checked="" type="checkbox"/> | Petition for Declaration of Invalidity or Alternative Dissolution of Marriage |
| H 0910 | <input checked="" type="checkbox"/> | Joint Petition for Simplified Dissolution of Marriage |
| I 0904 | <input checked="" type="checkbox"/> | Petition for Custody only |
| J 0911 | <input checked="" type="checkbox"/> | Petition for Custody (Hague Convention) |
| K 0905 | <input checked="" type="checkbox"/> | Petition for Visitation only |
| L 0907 | <input checked="" type="checkbox"/> | Petition for Order of Protection only (which may include custody/visitation issues) |
| M 0905 | <input checked="" type="checkbox"/> | Petition to Register Foreign Judgment |
| N | <input type="checkbox"/> | Other Petition |

SUPPORT ENFORCEMENT PROCEEDINGS

| | | |
|--------|-------------------------------------|---|
| O 0938 | <input checked="" type="checkbox"/> | Administrative Declaration of Parentage |
| P 0934 | <input checked="" type="checkbox"/> | Percentage (IV-D) |
| Q 0933 | <input checked="" type="checkbox"/> | Percentage (non IV-D) |

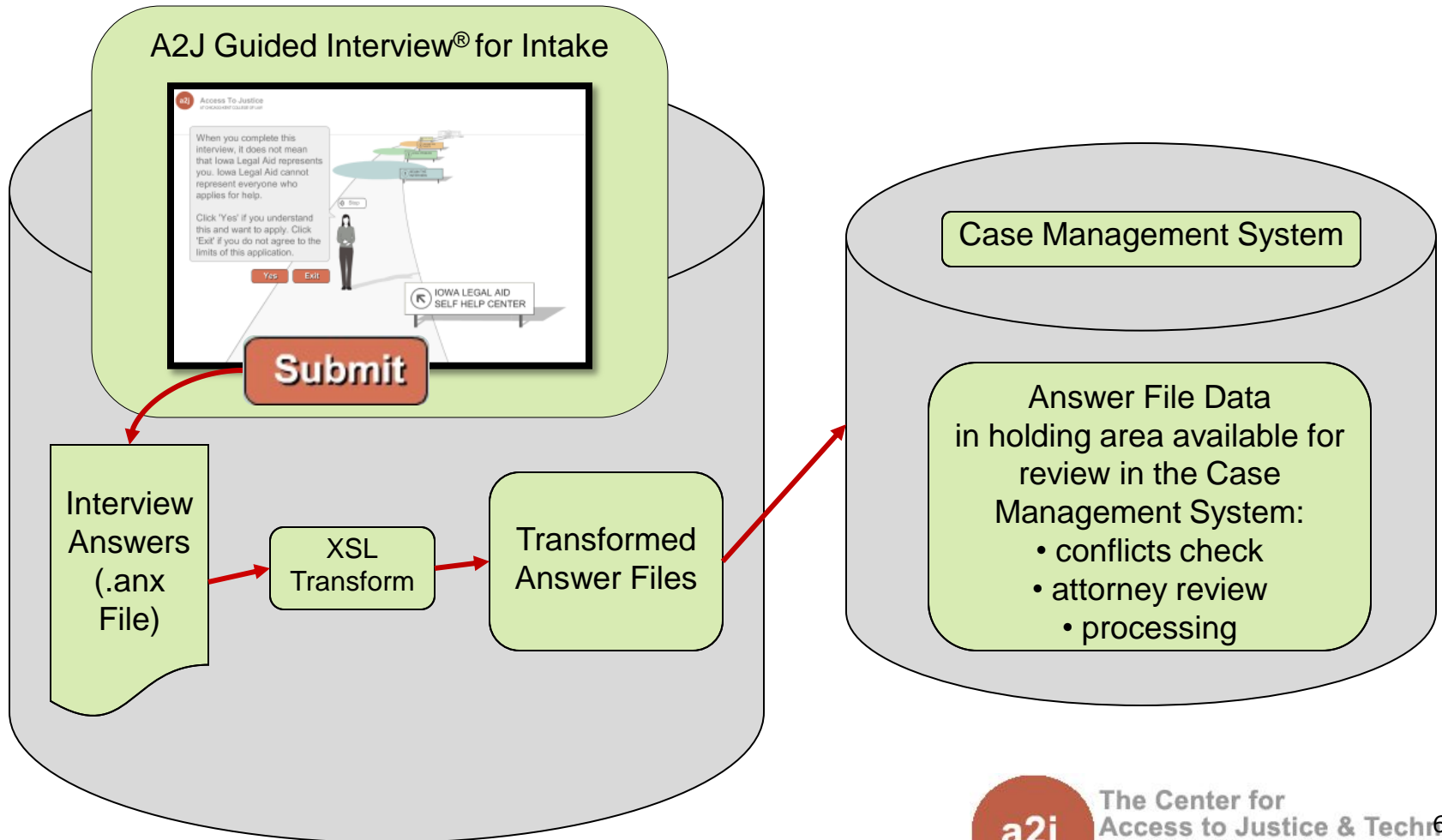


The completed document is returned to the end-user for printing or saving.

A2J Author interface collects data from end-user and stores data in an answer file.



Online Intake Process



Benefits of Online Intake

Benefits to Applicants

- ❑ Can apply from any location with a computer & internet access
- ❑ Remotely located applicants don't have to travel
- ❑ Available outside of business hours 24/7
- ❑ Shortens application time (est. 15-20 min)
- ❑ Saves time of applying at the wrong legal aid
- ❑ Get information and referrals to appropriate clinics, programs and pro se forms
- ❑ Wait time for phone callers is reduced



Benefits of Online Intake

Benefits to Organizations

- TIME SAVINGS
 - Unqualified applicants are redirected without talking to intake worker
 - Potential qualification issues are highlighted for intake workers to address first
 - Reduce errors in data recording
- Programs can reach targeted populations with alerts on the web site that cannot be done as easily on a phone system



Concerns Over Online Intake

- ❑ Increased work load on already overloaded attorneys
 - ❑ Total number of applicants does not typically increase, the way people apply changes
 - ❑ Online intake interview redirects applicants that do not qualify
 - ❑ Letters or email explaining conflict rejection policy or complaint process information and forms can be sent to rejected applicants, saving staff time from explaining these processes
- ❑ With the cost to implement, why not just hire one more employee?
 - ❑ One time cost that will save for years to come



Concerns Over Online Intake

Concerns of Organizations

- ❑ Changing applicant requirements?
 - ❑ Intake interview can easily be updated without recreating the entire program
- ❑ Impersonal contact with applicant
 - ❑ In redirecting applicants that do not qualify, staff can spend more time with qualified applicants
 - ❑ Always have personal follow up with qualified applicants
- ❑ Don't want information going directly into CMS
 - ❑ Can have holding pen inside or outside CMS
 - ❑ Can have applications emailed, similar to a document assembly project



How to Implement Online Intake with A2J Author[®]

□ Planning & Preparation

- Inception – meet with project stakeholders, identify roles, review budget, review other program's intake interview, determine goals & restrictions
- Elaboration – draft online intake script (in word processor), rounds of review with stakeholders

□ Construction

- A2J Guided Interview – using script draft questions and logic in A2J Author
- Interview Testing & Review – can still easily make changes at this point
- XSL Transform Development & Testing

□ Implementation

- Staff Training – train intake workers to process online applications
- Go Live – success!



How to Implement Online Intake with A2J Author[®]

□ Time

- Varies from program to program depending on available staffing resources
- Suggestion: If completing project in house, estimate high for times when other projects are more demanding

□ Cost

- Varies from program to program depending on many factors such as current staffing and need for outsourcing
- Suggestions:
 - Do not reinvent the wheel – start with an interview from another program that is similar to what you would like
 - Partner with other programs that have same CMS and get a basic interview done for the group and then customize to individual program needs



Additional Resources

- ❑ **A2JAuthor.org Online Intake Tools & Trainings**

Page: Find information from past trainings including

- ❑ Sample interviews from other programs
- ❑ Slides and recordings from past trainings

- ❑ **LSC Online Intake Policy, Compliance**

Considerations and Future Thoughts:

<http://tig.lsc.gov/presentations2011.php#onlineintake>



Questions? Feedback?



Access To Justice
AT CHICAGO-KENT COLLEGE OF LAW

Dina C. Nikitaides

Program Coordinator

Center for Access to Justice & Technology,
Chicago-Kent College of Law

dnikitaides@kentlaw.edu

312-906-5331

