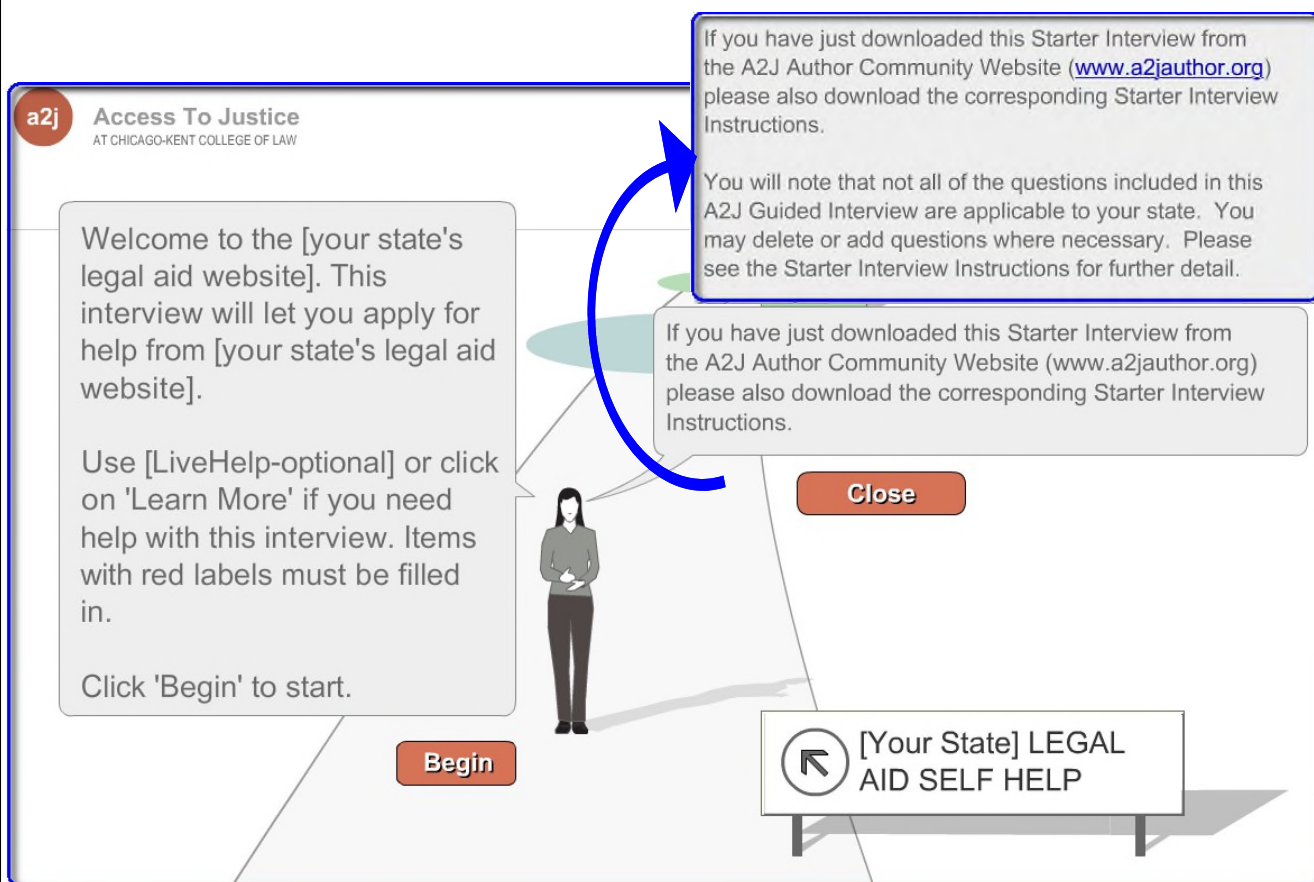


## STARTER INTERVIEW INSTRUCTIONS—Interview for Intake

i

Welcome to the A2J Author™ Interview for Intake Starter Interview Instructions. If you have downloaded the Starter Interview, you will notice that the Learn More feature has been used to guide you to this document (see below). Listed below are a few helpful hints you should note before beginning work on your A2J Guided Interview™.

1. The Starter Interview is intended to give authors a head start. The Starter Interview is not acceptable for use “as is”! While an attempt has been made to include questions that address data elements collected by various legal aid organizations, you, as the author, will need to make adjustments according to your organization’s intake restrictions. *(continued on page ii)*



**FOR MORE INFORMATION REGARDING ANY COMPONENT OF THE A2J AUTHOR STARTER KIT PLEASE CALL OR WRITE TO:**



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2. An attempt has also been made to include helpful Learn More features at various points throughout the interview which answer questions that may be raised in the minds of an end user. While the answers provide a good template for Learn More features that you wish to include, they should be customized. For instance, Learn More features have also been used to refer the end user back to a legal aid website. Therefore, do not forget to modify website links, where necessary, to direct the user to your legal aid organization's website.
3. Questions have been organized under "Steps" in the Starter Interview as follows: a) Step 1: Begin Interview, includes a set of preliminary questions regarding residency status, jurisdiction, incarceration, case type (criminal excluded), age, and disability status; b) Step 2: Legal Problem includes evaluation of deadlines or urgent issues, and several multiple-choice questions designed to pinpoint sub-issues under the consumer, employment, family, health and housing categories; c) Step 3: Income and Assets evaluates number of people in the household and collects figures for various types of income and assets; d) Step 4: Your Information collects for full name, social security number, birth date, mailing address, email address, language, ethnicity, and marital status; e) Step 5: Household Information collects name, social security number and birth date for other adults and children in the home; f) Step 6: Other Party collects name and address for opposing parties; and, g) Step 7 provides for final comments.
4. Some questions may not be relevant to your organization or you may need to add questions. A few sample questions have been provided to demonstrate additional data elements you may need to include (e.g., Question (4)1g1 collects alternate contact information, Question (5)1g collects additional information regarding adults in the household, such as gender and marital status). These questions are easily located by finding the disconnected questions in the A2J Author flowchart.
5. This Starter Interview makes several references to LiveHelp in the text of Questions as well as in the text of certain Learn More features. If your organization is not currently using LiveHelp you will need to delete those references. Also, until LiveHelp is made available in the A2J Guided Interview window or interface, you may wish to direct the end user to LiveHelp by providing a 'link' to your state's legal aid webpage that contains the LiveHelp 'button.'
6. Necessary adjustments include exchanging "[Your state's legal aid]" with the name of your organization wherever that phrase appears in the text of a Question or, in some cases, the Label text for a radio button. Question text can be adjusted in the Question dialog box for the particular Question and the text for any radio button Label can be adjusted under the "Label" field under the Fields Tab for a particular Question.