

PROLOGUE

Legal forms are complex, which can greatly hinder access to justice. The complexity of legal forms is particularly problematic for individuals with no legal representation and no meaningful access to legal services, such as when they do not earn enough to pay for a private attorney but earn too much to qualify for legal aid. Access to civil representation is not guaranteed by the Constitution in the same way defendants in criminal proceedings have a right to an attorney.¹ Therefore, a substantial civil justice gap has formed for many people in the United States. A2J Author® helps to fill the gap by helping those without lawyers complete legal forms. A2J Author is a free software as a service (SaaS) program co-developed by the Center for Computer-Assisted Legal Instruction (CALI®) and IIT Chicago-Kent College of Law (Chicago-Kent). It asks the self-represented individual simple questions, through A2J Guided Interviews®, and enhances that experience using definition pop-ups, help questions and answers, and visual cues that allow the user to better contextualize the legal process. A2J Author has made a lasting impact since its introduction in 2005: almost 4 million uses and over 2.25 million documents generated.²

Through the A2J Author Course Project, CALI and Chicago-Kent have exposed law faculty across the country to A2J Author and its uses in a classroom setting. Students who are interested in the intersection of law and technology and also have a desire to do work that increases access to justice, can use A2J Author to create A2J Guided Interviews for use by courts and legal aid organizations. A2J Author allows students to translate their substantive legal knowledge into an expert system relying on rules-based artificial intelligence. Creating A2J Guided Interviews provides students with experience working with technology and software. It

¹ Jeanne Charn, *Celebrating the “Null” Finding: Evidence Based Strategies for Improving Access to Legal Services*, 122 YALE L.J. 2206 (2013).

² *Id.*

introduces students without a technical background to the type of logical reasoning used in programming. Students are using A2J Author to transform a standard legal form required by a court, and its underlying law, into a series of questions for the self-represented individual to complete. Through courses including A2J Author, students have been able to develop critical lawyering skills. They learn client-focused skills like counseling and plain language communication as they think through how questions will be asked, displayed, and sequenced across the pages within an A2J Guided Interview.

However, A2J Author courses have not been without challenges. As with other software, A2J Author manifested bugs, particularly as it moved toward a cloud-based platform in Version 5.0. Understandably, those technical issues presented challenges to faculty and students of A2J Author and can be magnified within the constraints of a traditional semester-long course. Additionally, while A2J Author provided a powerful visual interface for interviewing an end-user, the document assembly function needed to be done in a separate program, HotDocs, which is incompatible with Apple computers. Law students are increasingly opting for Macbooks over Windows laptops,³ and without an integrated document assembly feature on A2J Author, teaching the program requires ensuring that students with Macbooks also have access to a Windows computer, for example, through reserving time in the law school's computer lab. Relatedly, having to learn HotDocs in addition to A2J Author required building in more course time for instruction and training in the program.

³ Incoming 1L students at Paul M. Hebert Law Center Louisiana State University and University of Victoria Law were surveyed in fall of 2015 about what brand of computer they used. At the University of Victoria, 63.6 % of students used Mac computers, 34.8% used Windows computers, and 1.5% used Linux computers. At Louisiana State University, 67.7% of students used Mac computers and 32.3% used Windows computers. Survey results shared with CALI by Professor Will Monroe of Louisiana State Law School and Rich McCue (on file with CALI).

Building upon both the successes and challenges of past A2J Author faculty, CALI and Chicago-Kent set out to refine A2J Author to create an even more impactful software program. The latest version of A2J Author, 6.0, features integrated visual interviewing and document assembly. Both functions can be done completely within A2J Author, providing an end-to-end solution to what once required separate programming in HotDocs. That feature alone will immensely aid in teaching A2J Author to law students, who are increasingly buying Macbooks⁴. Further, the number of law schools eschewing computer lab space for student use is increasing,⁵ so the new integrated document assembly feature is poised to become a game changer in teaching A2J Author courses.

A2J Author 6.0 represents a new way forward, with students needing to learn only one software program rather than two under the existing workflow. Learning two different software programs may present challenges, namely how the two programs work with each other and what is the best way to use both programs to maximize efficiency. Ideally students would be adept at working with different programs and across different technological platforms to be prepared for the practice of law in the 21st Century. In reality the time constraints of a semester make the task of learning two new programs along with the legal research and writing underlying the A2J Guided Interview challenging. Thus an integrated interviewing and document assembly program like A2J Author 6.0 becomes increasingly valuable because it saves faculty valuable in-class

⁴ Rich McCue, *12 Years of Student Technology Ownership Surveys: Trends & Today's Opportunities for Richer Learning Experiences* (Jun. 16, 2016), <https://richmccue.com/2016/06/16/12-years-of-student-technology-ownership-surveys-trends-todays-opportunities-for-richer-learning-experiences/>.

⁵ In February 2017, the authors of this Course Kit conducted a survey of law schools. The call for survey participants was circulated through the teknoids.net listserv. The teknoids listserv describes itself as “a list for folks involved and/or interested in support and development of IT for law schools, law firms, the judiciary and more.” <https://lists.teknoids.net/listinfo/teknoids> (last accessed Feb. 4, 2018). IT professionals and law librarians from 48 U.S. law schools responded to the survey, and 35 reported that their law school had a computer lab or a dedicated space with computers. Some law schools maintain both PCs and Macs; 33 schools provide PCs and 9 provide Macs (on file with CALI).

teaching time and students out-of-class training time. Students can thus focus on substantive legal content and testing and refining their A2J Guided Interviews.

This A2J Author Course Kit integrates the experiences and feedback of past faculty of A2J Author, namely those participating in the A2J Author Course Project. It is through their hard work, and those of their students, and their willingness to try a new type of class focused on leveraging technology to close the justice gap, that CALI and Chicago-Kent are able to publish this Course Kit for future faculty.

CHAPTER 1

Introduction

The justice gap in the U.S. has been well documented. Millions of people each year cannot afford critical legal services and are often left to represent themselves in their legal proceedings. Legal aid organizations, governmental agencies, and private attorneys have sought to leverage technology to meet the legal needs of the poor. In 2005, IIT Chicago-Kent College of Law (Chicago-Kent) and the Center for Computer-Assisted Legal Instruction (CALI) took a leading role in the effort to close the justice gap by developing A2J Author, an innovative program that uses visual A2J Guided Interviews to help self-represented individuals navigate a legal process. Its user-friendly design allows developers to take complex information and present it in a clear and simple manner. Its simplicity should not however, belie its robust capabilities. A2J Guided Interview developers can add a wealth of legal information while leveraging just-in-time learning tools like definitional pop-ups and help graphics and videos. A2J Author has proven results; since its inception, A2J Author has been used over 4 million times and has produced over 2.5 million documents for self-represented individuals.

Those numbers would not have been possible without the legal aid attorneys, administrators, and legal technologists that created the corpus of over 1,000 A2J Guided Interviews nationwide. Law students emerged as a new cadre of content developers, and in 2010, Professor Ronald Staudt taught the initial offering of the Justice & Technology Practicum at IIT Chicago-Kent College of Law. The first course of its kind, the Practicum provides students with a foundation in the use of technology in the delivery of legal services, with a particular focus on low-income and self-represented individuals. Notably, the Practicum provides students an opportunity to gain technological competencies that are vital in today's legal marketplace.

Students are matched with legal aid organizations, which provide students with semester-long projects to automate through the creation of an A2J Guided Interview. Developing this powerful self-help resource allows students to learn important technical skills, foster heightened logical reasoning, and see firsthand how technology can be applied to address a widespread legal problem. Students also acquire skills in client interaction, legal project management, and plain language writing.

To learn more about the Justice & Technology Practicum, please read:

Ronald W. Staudt & Andrew P. Medeiros, *Access to Justice and Technology Clinics: A 4% Solution*, 88 CHI.-KENT L. REV. 695 (2013).

The success of the Justice & Technology Practicum highlighted the enormous benefits of teaching legal technology with significant emphasis in a law school class. Specifically offering this training through the lens of teaching A2J Author offers students the added benefit of working with a subject-matter expert attorney and the opportunity to complete a project within the timeline of a semester course. Buoyed by past successes and the potential to scale similar courses across the country, CALI and Chicago-Kent developed the A2J Clinical Course Project (now called the A2J Author Course Project), made possible through assistance from Idaho Legal Aid Services and a Technology Innovation Grant from the Legal Services Corporation (“LSC”). The first round of the A2J Clinical Course Project drew substantial interest from clinicians across the country and led to six schools offering pilot A2J clinical courses in the 2013-2014 academic year: Columbia Law School, Concordia University School of Law, CUNY School of Law, Georgetown University Law Center, the University of Miami School of Law, and the University of North Carolina School of Law. Those six schools and Chicago-Kent, which continued to offer

the Justice & Technology Practicum, generated 24 A2J Guided Interviews and a wealth of helpful course materials, which were compiled into the A2J Clinical Course Kit.

To learn more about some of the classes in the A2J Clinical Course Project, please read:

Conrad Johnson & Brian Donnelly, *If Only we Knew What we Know*, 88 CHI.-KENT L. REV. 729 (2013).

Tanina Rostain, Roger Skalbeck, & Kevin G. Mulcahy, *Thinking Like a Lawyer, Designing Like an Architect: Preparing Students for the 21st Century Practice*, 88 CHI.-KENT L. REV. 743 (2013).

Explore the course materials generated from the A2J Clinical Course Project:

Center for Computer-Assisted Legal Instruction, *A2J Author Course Kit* (2015), <http://a2jauthorcoursekitbook.lawbooks.cali.org/>.

Additionally, the first round of the A2J Clinical Course Project engendered significant interest among other schools across the country. This led to a second round of the Project, which was rebranded to reflect the broad interest beyond clinical faculty that the Project has generated as well as the variety of course types that could accommodate an A2J Author course. Thus, the Project in its second iteration is called the A2J Author Course Project. Six additional law schools have joined the effort as part of the Project: Hofstra University Maurice A. Deane School of Law, Indiana University Robert H. McKinney School of Law, Northwestern Pritzker School of Law, Stetson University College of Law, the University of Missouri-Kansas City School of Law, and the University of Tennessee College of Law.

This second volume of the Course Kit provides a foundation for teaching an A2J Author course. The kit does not provide instruction on teaching a body of substantive law. Rather, it seeks to outline the various considerations a professor would need to make when offering an A2J

Author course. Where relevant, however, the kit does present readings and materials on discrete issues that may be encountered when using technology in the delivery of legal services, including legal ethics, professional development, and emerging technologies. Moreover, materials presented in the kit account for instruction of students with different levels of technical expertise. Although there is a learning curve, A2J Author was designed to be intuitive and user friendly. It is sufficient for students to have only basic word processing experience before enrolling in an A2J Author course.

Numerous facets of planning and administering an A2J Author course are covered in the Course Kit, including: identifying a suitable course type, structuring the semester coursework, collaborating with a legal aid organization, and technical considerations. Importantly, course materials produced out of the second round of the Project are provided as examples to assist faculty in planning and teaching their respective course. Among other things, course materials presented in this book include course descriptions, sample syllabi, and assignments. The A2J Author Course Project fellows also provide structured and targeted feedback that reflect their varied perspectives and the unique experiences each had when teaching their respective course.

CHAPTER 2

Why Teach an A2J Author Course?

One of the primary reasons to teach an A2J Author course is to facilitate student participation in the work of lowering barriers to justice using technology. Faculty can provide a learning and development space for students to work on self-help resources for those who cannot afford a lawyer while also helping to raise awareness among students of the new markets opening up in the provision of legal services, such as incubators.⁶ Furthermore, A2J Author courses are accessible on-ramps for students who are just beginning to explore their interest in public interest law and facilitates further exploration by those students who have already immersed themselves in public interest coursework and professional obligations. To create greater market awareness, faculty of an A2J Author course should frame the justice problem for their students, and in particular, the ways in which technology has emerged as a valuable tool to help close the justice gap. This important background incentivizes students' active participation throughout the course and highlights the contributions they can make to the justice system through a concrete, deployable assignment: an A2J Guided Interview.

To illustrate the importance of technology to deliver legal services, faculty of an A2J Author course should become familiar with the work of the Legal Services Corporation (LSC), an independent 501(c)(3) corporation established by Congress to financially support civil legal aid programs for the low-income and underserved. LSC is the single largest funder of those civil legal aid programs in the United States. Through its Technology Initiative Grant (TIG) program, LSC seeks to “improve legal services delivery to the low-income population and to increase access by low-income persons to high quality legal services, to the judicial system, and to legal

⁶*Legal Incubators*, American Bar Association, https://www.americanbar.org/groups/delivery_legal_services/initiatives_awards/program_main.html (last accessed on 1/22/2018).

information”⁷ (A2J Author is funded through the TIG program). In 2012, LSC held its first Summit on the Use of Technology to Expand Access to Justice, and announced a new mission: “to explore the potential of technology to move the United States toward providing some form of effective assistance to 100% of persons otherwise unable to afford an attorney for dealing with essential civil legal needs.”⁸ The Summit focused on five technological components of its integrated delivery system to meet its mission: statewide legal aid portals, document assembly programs, mobile technologies, business process analysis, and expert systems.⁹ A2J Author targets four of the five technological components of the Summit. It is a mobile-accessible expert system with document assembly capabilities in the latest version. It produces A2J Guided Interviews that can be posted on statewide legal aid portals. To date, its use as a business process analysis tool is minimal.

The Summit’s mission emphasizes the ways in which the use of technological platforms has supplemented traditional models of legal services delivery to provide assistance more broadly through scale. Many legal aid organizations remain insufficiently funded, and despite the hard work of legal aid attorneys, approximately 80% of low-income Americans have unmet civil legal needs, as the demand for services continues to outpace available resources¹⁰. Faculty of A2J Author courses, therefore, should stress to their students that justice and technology are more deeply intertwined than they may think. To help those who cannot afford legal assistance necessarily entails at a minimum, becoming familiar with the latest digital tools and programs that are currently available and learning how to adapt to emerging technologies. Going a step

⁷*Our Programs*, Legal Services Corporation, <http://www.lsc.gov/grants-grantee-resources/our-grant-programs> (last accessed on (1/21/2018)).

⁸ *Report of the Summit on the Use of Technology to Expand Access to Justice*, Legal Services Corporation (December 2013), http://www.lsc.gov/sites/default/files/LSC_Tech%20Summit%20Report_2013.pdf.

⁹ *Id.*

¹⁰ *The Justice Gap: Measuring the Unmet Civil Legal Needs of Low-Income Americans*, Legal Services Corporation (June 2017), <https://www.lsc.gov/sites/default/files/images/TheJusticeGap-ExecutiveSummary.pdf>.

further, enterprising students should be encouraged to innovate and use their technological knowledge to create new solutions to the access to justice problem.

To learn more about LSC’s technology mission, please read:

Legal Services Corporation, *Report of The Summit on the Use of Technology to Expand Access to Justice* (2013), <http://www.lsc.gov/media-center/publications/report-summit-use-technology-expand-access-justice>.

Faculty of A2J Author can provide students with examples of the ways in which courts and legal aid organizations have risen to the challenge of leveraging technology to create online resources that provide legal assistance otherwise unavailable through traditional models. The New York State Court System, for example, has created do-it-yourself (DIY) forms using A2J Author and HotDocs.¹¹ Shrinking court budgets led to cuts in staff, including clerks, interpreters, and Court Help Center personnel, as well as a reduction in operating hours.¹² The creation of DIY forms has been an effective and well-received response.¹³ Self-represented litigants can easily access the DIY forms through kiosks and computer terminals at the courthouse, with the ability to access automated forms across a wide range of subject-matter areas, from family to housing law. In addition to the New York State Courts, four federal district courts use A2J Author as the user interface for e-filing.¹⁴

Moreover, adopting statewide standardized court forms has emerged as a way by which courts have sought to increase access to justice. Standardized forms represent additional

¹¹ Rochelle Klempler, *The Case for Court-Based Document Assembly Programs: A Review of the New York State Court System’s “DIY” Form* 1191, 41 *Fordham Urb. L.J.* (2014).

¹² *Id.*

¹³ *Id.* at 1211-1213.

¹⁴ U.S. District Court for the E.D. Missouri <http://www.moed.uscourts.gov/e-pro-se>, U.S. District Court for the W.D. Washington <http://www.wawd.uscourts.gov/pro-se/e-pro-se>, U.S. District Court for Vermont, <http://www.vtd.uscourts.gov/e-pro-se> (last visited May 17, 2017) -- M.D. Florida -- and Jess is going to “help” this footnote when she reviews this draft.

opportunities for the development of online document automation tools like A2J Guided Interviews. In 2012, for example, the Illinois Supreme Court adopted a rule creating a standardized forms committee,¹⁵ which has since undertaken the task of creating and approving forms, including a fee waiver, a suite of motion documents, and a suite of expungement and sealing documents.¹⁶ Illinois' statewide legal aid portal, Illinois Legal Aid Online, is working with the Illinois Supreme Court to automate those standardized forms, which presents opportunities for students to work on A2J Guided Interview projects.

To learn how A2J Author has been used in the New York State Court System, please read:

Klempner, *supra* footnote 11.

Rochelle Klempner, *The Case for Court-Based Document Assembly Programs: A Review of the New York State Court System's "DIY" Form*, 41 Fordham Urb. L.J. 1189 (2014).

Even for students who have no plans to work in public interest law, it remains imperative that they cultivate technological competencies while still in law school as part of their professional development. It is incumbent upon future lawyers and legal professionals to learn how to use technology broadly and to understand its impact across the legal profession if they are to be viable candidates for legal jobs across the spectrum.¹⁷ The legal market has placed demands on legal service providers to provide those services more efficiently and less expensively.¹⁸ Aside from legal aid organizations, law firms and corporate legal departments alike have increasingly leveraged technology to meet those demands. Students seeking entry into positions at those institutions must be able to add value through their technical skill set. Employers

¹⁵ Matthew Hector, *Work on Illinois Standardized Court Forms Continues*, Illinois Bar Journal (January 2015), <https://www.isba.org/ibj/2015/01/lawpulse/workillinoisstandardizedcourtformsc>.

¹⁶ *Approved Forms*, Illinois Supreme Court, <http://www.illinoiscourts.gov/forms/approved/default.asp> (last accessed on 1/20/2018).

¹⁷ Richard Susskind, *Tomorrow's Lawyers* (2013).

¹⁸ *Id.*

presume candidates already know the law and can provide counsel to clients. Students can therefore set themselves apart by developing skills in streamlining legal processes and creating technology tools to enhance legal service delivery.

To learn more about the importance of incorporating law practice management and technology in the classroom, please read:

Richard S. Granat & Stephanie Kimbro, *The Teaching of Law Practice Management and Technology in Law Schools*, 88 CHI.-KENT L. REV. 757 (2013).

Furthermore, possessing knowledge about emerging technology is part of a lawyer's ethical duty. Comment 8 of the American Bar Association's Model Rules of Professional Conduct states, "To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, *including the benefits and risks associated with relevant technology*, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject."¹⁹ As of March 8, 2017, 27 states have adopted this standard.²⁰ Therefore, developing fluency in existing technology and learning how to adapt to new technology is an essential part of a law student's legal education. Relatedly, law and technology courses may qualify as experiential courses²¹ under the American Bar Association's Standard 303(a)(3) of its Standards and Rules of Procedure for Approval of Law Schools.

¹⁹ *Comment on Ethics Rule 1.1*, American Bar Association, http://www.americanbar.org/groups/professional_responsibility/publications/model_rules_of_professional_conduct/rule_1_1_competence/comment_on_rule_1_1.html (last accessed on 1/21/2018).

²⁰ Robert Ambrogio, *28 States Have Adopted Ethical Duty of Technology Competence*, Law Sites, <http://www.lawsitesblog.com/2015/03/11-states-have-adopted-ethical-duty-of-technology-competence.html> (last updated 9/5/2017).

²¹ Robert L. Jones, Jr., *Integrating Experiential Learning Into the Law School Curriculum* (Mar. 1, 2015), Notre Dame Law School, https://scholarship.law.nd.edu/cgi/viewcontent.cgi?referer=https://www.google.com/&httpsredir=1&article=2213&context=law_faculty_scholarship

Suggested Readings

Richard Susskind, *Tomorrow's Lawyers: An Introduction to Your Future* (2013).

Legal Services Corporation, *Report of The Summit on the Use of Technology to Expand Access to Justice*

http://www.lsc.gov/sites/default/files/LSC_Tech%20Summit%20Report_2013.pdf (2013).

Charles L. Owen, Ronald W. Staudt, Edward B. Pedwell, *Access to Justice: Meeting the Needs of Self-Represented Litigants*,

<https://www.kentlaw.iit.edu/Documents/Institutes%20and%20Centers/CAJT/access-to-justice-meeting-the-needs.pdf> (2001).

Daniel Martin Katz, *The MIT School of Law? A Perspective on Legal Education in the 21st Century*, 2014 Illinois L. Rev. 1431 (2014),

http://papers.ssrn.com/sol3/papers.cfm?abstract_id=2513397.

Having decided to teach an A2J Author course, the next chapter discusses the various considerations a professor should make when planning the course. Faculty should consider the contours of their semester-long collaboration with a legal aid organization, taking into account, among other things, the project timeline and the availability of legal aid personnel familiar with A2J Author and HotDocs. Alternatively, faculty may opt to teach a simulation-based A2J Author course in one semester and work with a legal aid organization in a subsequent semester. Faculty should also ensure that students who use Macbooks have access to Windows personal computers, if they intend to use HotDocs as the document assembly software for the project.

CHAPTER 3

Planning an A2J Author Course

A. Partnering with a Legal Aid Organization

As the previous chapter illustrated, one of the principal goals of teaching an A2J Author course is to lower barriers to justice by scaling development of A2J Guided Interviews through student participation. In order to achieve this goal, faculty partner with a legal aid organization or court to have their students automate a form. Typically, this entails creating a new A2J Guided Interview for an existing form. However, students might also be tasked with updating an existing A2J Guided Interview or in extraordinary cases, creating both the underlying form and creating an A2J Guided Interview and corresponding document assembly template.

In addition to providing the substantive form automation and document assembly project, an organization that is funded by the Legal Services Corporation can facilitate hosting of the production version of the A2J Guided Interview and HotDocs template. LSC-funded organizations are eligible to upload A2J Guided Interviews and HotDocs templates onto the LawHelp Interactive (LHI) national server. Without access to this server, a legal aid organization would need to purchase its own HotDocs server, which would likely be cost-prohibitive. However, faculty should not be dissuaded from offering an A2J Author course because they are unable to partner with an LSC-funded organization. An A2J Guided Interview does not need to be connected to a HotDocs template and could stand alone as an interactive guide that could provide legal information or direct self-represented individuals to other resources. In extraordinary circumstances, a legal aid organization may have paid for its own HotDocs server and would be capable of posting projects without having to use the LHI national server.

A helpful resource for legal aid organizations, courts, and law schools is the A2J Project Matching Tool. The A2J Project Matching Tool makes finding A2J Author projects easy by centralizing available projects in one place. The matching tool allows legal aid organizations and courts to post information about form automation projects as well as a sample of the document(s) requested for automation. Faculty can browse available forms and see the contact information for the respective organization or courthouse. Matching would then take place through communications between the organization and the law school. Once a project match has been made, the legal aid organization or court can indicate on the portal that the project is no longer available.

For help finding A2J projects for your students, please visit:

<http://www.a2jauthor.org/matching>

Initial contact with the legal aid organization about the A2J Author project should be made at least one month in advance of the semester during which the A2J Author course will be offered. This will ensure that faculty will have time to accurately assess whether their students can complete the project within the semester or whether arrangements can be made to continue the project into a subsequent semester. This assessment should take into account coursework and fieldwork students will have to do in addition to development of the A2J Guided Interview. This additional work includes, but is not limited to, course readings, mini assignments, written memoranda, client consultations, and internal meetings with the professor. Faculty should also consider whether the frequency and duration of in-class sessions will support sufficient progress tracking and opportunities for students to pose questions about issues related to A2J Guided Interview development. Meeting more than once a week will help to facilitate this, but if the

course schedule does not allow, faculty should schedule at least one check-in (e.g. office hours) with the students per week.

Faculty should clearly set expectations early in the collaboration with the legal aid organization. The chief considerations are defining the scope of the project and determining whether there are opportunities to adjust the scope of the project depending on the demands of the class or organization. Faculty may opt to have students communicate directly with a liaison from the legal aid organization, in which case the students should engage the legal aid organization on those issues of scope. Faculty should also ensure that the students work with a domain expert attorney, whether the professor or an attorney from the legal aid organization. If the students will work with a domain expert attorney from the legal aid organization, the professor should inform the attorney of the level of accessibility the professor expects, and the attorney should inform the professor of any periods during which their schedules will not allow for communications. Additionally, faculty should inquire about the availability of a technical expert at the legal aid organization, one who has experience working on A2J Guided Interviews and HotDocs templates. Based on experiences of Project fellows, these experts are rare. Legal aid organizations have relied increasingly on outside developers familiar with A2J Author and HotDocs to automate its forms.

Another expectation that faculty should clearly set is how the transition process will look, namely what happens to the project when the students have finished the course. The primary factor that determines the contours of this transition is to what extent the students will be expected to test and produce an A2J Guided Interview of a certain quality that is satisfactory to the legal aid organization. Students should be encouraged to continuously test their A2J Guided Interviews and document assembly templates throughout the development process. This entails

testing to ensure proper functionality and testing as different types of end-users to account for various conditions. However, students will eventually reach a point when continual testing is no longer feasible given the course schedule. Less optimistically, students may not sufficiently test their A2J Guided Interviews and legal aid organizations will then need to perform their own substantial development and testing before uploading production versions of the A2J Guided Interview and HotDocs template. Some legal aid organizations have personnel that can conduct additional testing while other organizations will expect a production version ready to post once they receive the files from the students. Initially, faculty, and not the students, should discuss the transition process with the legal aid organization at the outset to avoid unmet expectations.

B. A2J Author Simulation Course

While this chapter focuses on considerations professors should make in a semester-long course with a collaborative legal aid component, teaching a simulation-based A2J Author course is a good alternative for professors who can devote more than one semester to teaching A2J Author or for those whose primary objective is to teach A2J Author to students to expose them to a new application of legal technology. The objective of a simulation course is to provide students first with the technical expertise in A2J Author before they leverage that knowledge in the service of legal aid. Students could later, in a follow-up course, independent study, internship, or externship, work on an A2J Guided Interview for a legal aid organization. A simulation-based course provides faculty with enhanced flexibility in course scheduling because they are able to assign discrete, closed-universe exercises without building in time to coordinate with a legal aid organization. The exercises would not even need to lead to automation of a legal form. Because A2J Author can automate completion of any type of document, non-legal forms can be used for

training purposes (e.g. school administrative forms). A simulation course eliminates the extra time needed to create a customized A2J Guided Interview while giving students the opportunity to learn various A2J Author topics. These exercises are easily replicable in subsequent semesters thus minimizing the time needed to compile training coursework.

A2J Author simulation courses should project students into future relevant work in public interest law. Again, this work may be done in the context of a follow-up class or independent study with a legal aid collaboration component. Having completed coursework in a simulation class, students can also use their expertise in an internship, externship, fellowship, or other legal aid employment opportunity. Acquiring the specific competencies related to A2J Author and the more general technical knowledge gained from learning new software will prove beneficial to technically-minded students who are interested in public interest work. Jobs are opening up at the intersection of law and technology as institutional decision makers seek ways to make the delivery of legal services more efficient.²²

C. Technical Requirements

A2J Author is cloud-based and does not require a separate software download. Thus, the only requirement for using A2J Author is having access to a computer with a modern web browser. Students using Macbooks will not have a problem accessing A2J Author, as they once did with the Flash-based version of A2J Author. The cloud-based platform is particularly beneficial given 7.4% of computer users use Apple products²³.

Faculty interested in teaching an A2J Author course should also become familiar with and have access to video conferencing tools, particularly those that allow for screen sharing. This

²² Susskind, *supra*.

²³ *IDC Worldwide Quarterly PC Tracker*, International Data Corporation (October 2016), <https://www.idc.com/getdoc.jsp?containerId=prUS41846116>.

is useful when requesting technical support from CALI and Chicago-Kent, whose personnel can better identify development and technical issues if they can see what is on the developer's screen. While the A2J Author support team can provide assistance via email and phone, video conferencing allows for a quicker and more targeted response.

Most A2J Author projects have a document assembly component where A2J Author will be used as the front-end interface and HotDocs is used to assemble the content that populates the underlying form. While HotDocs is one of the most popular document assembly software programs on the market, it is limited by the fact that it cannot be installed on Apple computers. Therefore, instructors who are planning for their students to automate a form as part of their A2J Author project should make arrangements for students to have access to a computer lab or Windows laptop rentals provided by their institution's information technology department. At the very least, instructors must advise students that they need access to a Windows computer for the duration of the course. Furthermore, access to a Windows computer should be consistent throughout the day as students' schedules—particularly those of part-time or evening students—may only allow them to work on their A2J Author project during late hours.

For documents requiring less complex formatting, such as demand letters and pleadings, professors can use the A2J Document Assembly Tool (DAT), which is integrated into the latest version of A2J Author. The DAT can create a template that is directly linked to the A2J Guided Interview, all within a single program. The DAT has made a significant impact on the A2J Author workflow. Professors of A2J Author may now be able to teach students how to create an end-to-end solution in less time and with less complexity than teaching students how to create a separate template in HotDocs.

D. Completion Time for A2J Author Project

Determining how much time to devote to an A2J Author Project is imperative. In-class time spent teaching the A2J Author software should not be extensive. This can usually be accomplished in about four hours, with about an hour and a half focusing on the basic functionality of the software and the rest of the time covering more advanced topics like repeat loops, functions, and conditional branching. However, in addition to learning the software, student work on the discrete A2J project will also involve researching the substantive legal issue, creating the A2J Guided Interview itself (and corresponding HotDocs template, if applicable), and testing through iteration. There are various factors that will determine how much time should be devoted on the syllabus for work on the A2J Guided Interview, including but not limited to the course type, the number of course hours, the frequency of in-class meetings, the students' technical experience, and the scope of the A2J Guided Interview. Faculty should consider those factors holistically to structure the syllabus in a way that will provide students sufficient time to complete their projects. For example, a clinical course (or hybrid course with some features of a clinic) entails students engaging in practice-oriented tasks throughout the semester, including client interaction and representation, legal research, and administrative work. Clinical students will thus have less time to devote to A2J Guided Interview development and testing. Faculty may account for this by offering more credit hours or if that is not feasible, by assigning a less extensive A2J Guided Interview.

While there are different ways in which faculty may structure their syllabus in light of the different factors applicable to their course, two key principles should guide faculty when structuring their syllabus: **introduce A2J Author early in the semester and provide multiple project checkpoints**. Exposing students to the software early allows them to frame their

coursework and individual research in the context of their A2J Guided Interview. Students are better able to develop A2J Guided Interviews if they can first see where content goes, how content is displayed, how segments of content are connected, and what enhanced learning features are available. This overview does not have to be extensive. Rather, faculty should provide an overview of the software within the first two class sessions and require that a student complete an A2J Guided Interview as a self-represented individual so that they glimpse the user experience. Students should be assigned to complete an existing A2J Guided Interview even before the course formally begins, for example, as an initial “reading” assignment.

Checking in frequently with students throughout the semester is also a critical component of an A2J Author course. While faculty can teach students how to use A2J Author through abstract examples and exercises, a significant part of the students’ learning process entails actually using the A2J Author software to automate their assigned form. Invariably, students will experiment with features and undergo a trial and error process as they create their Guided Interviews. They must be able to report back to their professor with sufficient frequency so that any problems associated with developing the Guided Interview can be remedied and addressed to other students in the class who may be experiencing similar problems. In the case of courses that meet once per week, faculty should consider dedicating a portion of each class for status updates and working sessions. It is during these working sessions where students can share ideas with their peers and where they can discuss with their teacher whether any adjustments to the project need to be made. Faculty may also choose to require an office hours meeting outside of class, even if brief, to address any student concerns. While much of the development of the A2J Guided Interview may occur outside of class, consistent project checkpoints will ensure quality control of the project throughout the semester.

E. Teaching A2J Author

A2J Author has been designed with a fairly minimal learning curve. Faculty should find the interface to be user-friendly and the feature set straightforward and easy to use. Before beginning to train in A2J Author, faculty should run through at least one A2J Guided Interview on their own. This is perhaps the best way to introduce oneself to the software and to see how the fruits of development work will actually look to the end-user. After completing their very own Guided Interview, faculty may avail themselves of the various A2J Author training resources that are available online. While faculty are free to use the resources in whatever fashion they like, a recommended progression through the resources is provided below. Note that not only can faculty use these resources for their own training, but they can also assign these resources to their students as part of their coursework.

1. Simulation Exercise

The simulation exercise is an excellent way to introduce faculty and students alike to A2J Author. Faculty learn the software by creating their own end-to-end Guided Interview and HotDocs template, and in turn, can feel confident teaching those skills to their students. The exercise teaches how to use features that are commonly used in A2J Guided Interviews (and may very likely be needed for their students' projects) such as repeat loops and variable macros.

Repeat loops are used when the Guided Interview developer wants to ask the same question set more than once but does not want to manually create each question multiple times. The developer can simply create the set of questions that will repeat and indicate how many times those questions will in fact repeat. Developers may use this, for example, when asking the same

information about each end-user's child in a child support Guided Interview or asking the same questions about an end-user's assets in an estate planning Guided Interview. **Variable macros** enable the developer to call up the value of a previously entered variable. A common use for a variable macro is to display the end-user's name (as entered by the end-user at the beginning of the Guided Interview) so that the developer can personalize subsequent questions using the end-user's name.

2. *A2J Author YouTube Channel*

URL: www.youtube.com/user/A2JAuthor

This [video library](#) boasts a collection of videos that cover the spectrum of A2J Author features. Like the Authoring Guide, use this as a reference resource if you want to see how to perform certain actions on A2J Author.

3. *A2J Authoring Guide*

URL: www.a2jauthor.org/content/a2j-authoring-guide

The guide is a detailed manual providing information and instruction on the A2J Author feature set. Consult the A2J Authoring Guide to take a deeper dive into A2J Author's various features. This is not meant to comprehensively cover every facet of the software, but it does cover the essentials. This should not be assigned to students on its own. Rather, it should be framed as a reference resource should students need more detailed instruction on A2J Author.

A crucial component of teaching A2J Author is determining who will be doing quality control on the Guided Interviews. This is not a major concern in a simulation-based A2J Author

class as the Guided Interviews are of a definite length (often shorter), and with a closed universe of resources, the teacher will already know what the end product should look like. However, determining who will conduct quality control is a paramount concern when the Guided Interview is being created for a legal aid organization for use by self-represented individuals. While A2J Author is the tool, faculty and their legal aid organization contacts must determine who is ultimately responsible for ensuring that formatting, substantive content, and functionality are all correct.

While A2J Author faculty should always strive to ensure excellent student work product, they may feel that a legal aid organization possesses more technical expertise to ensure total quality control of the final Guided Interview. On the other hand, legal aid organizations may request that the course automate one of its forms and expect a production quality Guided Interview that is ready for immediate posting. If the teacher accepts responsibility for total quality control, he or she should ensure that the students are ready to respond to any requests by the legal aid organization that may alter content or functionality and do so within the agreed timeframe. Additionally, faculty must schedule enough time for students to test their Guided Interviews. Again, this is all a part of setting expectations for the collaboration at the outset.

CHAPTER 4

A2J Author Course Case Studies

Editors' Note: The second round of the A2J Author Course Project coincided with a rebuild of the LawHelp Interactive server infrastructure. Prior to the rebuild, the LHI server could not support cloud-based versions of A2J Author, including the version students worked in, 5.0, which was released in 2014. Student A2J projects from the Course Project were not able to be posted to the LHI server until April 2017, when full integration with the A2J Author 5.0 and 6.0 were complete.

A2J Author is a versatile web-based application that can be used in a variety of courses, from traditional clinics to practicum courses. Before deciding to teach A2J Author, faculty will likely have a pre-existing course model in mind and will look for ways in which to incorporate A2J Author within that course model. Conversely, some faculty may want to offer a brand new class focused on A2J Author and will look to the course model that best suits their pedagogical objectives. This chapter will provide an overview of the different types of courses that have used A2J Author in partnership with a legal aid organization. This overview is not meant to be prescriptive but rather illustrative of how a teacher might use A2J Author within a particular course model.

A. Traditional Clinic

Indiana University Robert H. McKinney School of Law: Civil Practice Clinic (Evening Section)

Professor Carrie Hagan taught the *Civil Practice Clinic* in Fall 2015. Because there were fewer options for evening students to receive clinical training, Professor Hagan offered the course in the evening. Professor Hagan incorporated A2J Author into the *Civil Practice Clinic* because she saw the need to provide a more tailored experiential learning opportunity for evening students who required more technology training and less training in trial skills. Teaching A2J Author also allowed Professor Hagan to provide training in a non-traditional clinical setting while meeting the criteria of a clinical course as set by the American Bar Association.

Students in the course were divided into two teams of two students, each assigned a form that could be automated in A2J Author. One team worked on an expungement petition (initially), and the other worked on a Civil Protection Order Contempt Form. The course began with both teams meeting with Professor Hagan for a mandatory one-day orientation session, during which the students learned about clinical office procedures; received an overview of poverty, ethics, and professionalism; and received a primer on A2J Author. In addition to assigned readings and legal research, students were also required to complete a storyboard, the HotDocs template, and the A2J Guided Interview. Apart from the A2J Author primer, Professor Hagan devoted four class sessions entirely to A2J Author and HotDocs training, as well as an additional class for troubleshooting and review.

Overall, Professor Hagan and her students had positive feedback about incorporating A2J Author into the *Civil Practice Clinic*. The students found A2J Author easy to use and loved using the software for their projects because it allowed them to think creatively about approaches to client representation. Although unfamiliar with both A2J Author and HotDocs, Professor Hagan

felt comfortable enough with both to use as tools in the class. Professor Hagan attributed her level of comfort to the assistance received from the A2J Author support team and the training resources available online. Moreover, the course produced two A2J Guided Interviews, one standalone and another with a corresponding document assembly template (the Civil Protection Order Contempt Form).

Nevertheless, there were some challenges. The expungement project needed to be reframed in light of semester time constraints. Ultimately, the students did not automate the expungement petition, but rather created a standalone A2J Guided Interview for attorneys completing expungement forms. While it was a useful resource, the reconceptualized Guided Interview did not entirely meet client expectations. Additionally, this version of Professor Hagan's course was brand new to the curriculum, and as with any new courses offered, the administration often has to be convinced that a change in the curriculum will benefit students and the law school.

Professor Hagan expressed enthusiasm for incorporating A2J Author into future courses. She noted that gaining a deeper knowledge of A2J Author would be beneficial for future offerings, as well more dialogue and brainstorming with the legal aid organization to determine the most impactful A2J Guided Interview project. Professor Hagan found that structuring her class into small teams was effective and would do that again for a future class. She also noted that A2J Author would be a good option for incorporating into the Interdisciplinary Clinic with students from the social work program.

To see sample resources from the Civil Practice Clinic, see Appendix _____

Northwestern Pritzker School of Law: Mediation Advocacy Clinic

Professor Alyson Carrel taught two classes using A2J Author, in both clinical and non-clinical dispute resolutions skills classes. In a typical A2J Author course, the class already has the form on top of which A2J Author would sit as a graphical front-end. Professor Carrel eschewed this traditional model and instead tasked her students with creating and designing new forms and processes related to mediation. Ultimately, while the students successfully created Guided Interviews in both courses, Professor Carrel's students did not think that A2J Author was the best technology tool for the goals of their specific projects.

Professor Carrel taught her first A2J Author course in Fall 2014, prior to her formal participation as an A2J Author Course Project Fellow. This first course was *Mediation Process and Advocacy* in which students worked in groups to create digital informational guides that highlighted the benefits of mediation. In this course, Professor Carrel offered no formal training in A2J Author but instead provided students options for creating those guides; A2J Author was one of the options. Two groups chose A2J Author and had access to assistance from a staff member at Chicago-Kent's Center for Access to Justice & Technology. Professor Carrel noted that despite the high level of assistance and significant time provided by Chicago-Kent technical staff, the students still experienced challenges. Nonetheless Professor Carrel was pleasantly surprised that the students were able to create Guided Interviews despite the lack of structured training time in A2J Author or readings and discussions introducing the software.

For the Fall 2015 semester, Professor Carrel taught a formally structured A2J Author experience. She taught a new clinical offering at the law school called the *Mediation Advocacy Clinic*, in which students could represent pro se parties in Equal Employment Opportunity Commission mediations. Professor Carrel had the following learning objectives for her students:

1. Learn how to create collaborative working relationships within the mediation setting while effectively advocating for a client;
2. Learn how to recognize the growing and appropriate use of unbundled services; and
3. Understand the impact technology has on the future of legal services, including mediation advocacy.

Although Professor Carrel wanted to explore integrating A2J Author outside of a clinic, she incorporated A2J Author into her clinic because she wanted to enhance her students' learning experience; increase the impact of the clinic during months when it was not in session; and account for the possibility of having insufficient case referrals during her first semester teaching the clinic.

The course agenda was certainly packed. Her students had a full caseload of representing clients in mediations throughout the semester while also creating a Guided Interview and corresponding HotDocs template. Professor Carrel's class differed from others in the A2J Author Course Project because rather than start with pre-existing forms, her students created the underlying forms before automating them in A2J Author and HotDocs. This meant more work for the students. Even though the students ably completed all of their required coursework, including client representations, drafting the underlying forms, and then automating those forms in A2J Author, it did highlight whether assigning an A2J Guided Interview was well-suited to the clinic's objectives. Regarding A2J Author, Professor Carrel noted that "[t]his seemingly elegant platform was so attractive to me that I attempted to use it to create entirely new forms and processes. But where we have the freedom, and luxury, to create a new form and process from scratch, we do not need to rely on A2J Author."²⁴ A2J Author can certainly take complex information and display it an easy-to-understand way for self-represented individuals. Professor

²⁴ Case study (on file with CALI).

Carrel's class, however, was able to create the forms and thus draft them in a simple way from the beginning. Nevertheless, Professor Carrel noted that teaching A2J Author provided a valuable learning experience because it allowed her class to explore what technological tools were available to more efficiently provide legal services.

To see sample resources from the Mediation Advocacy Clinic, see Appendix _____

Maurice A. Deane School of Law at Hofstra University: Using Technology to Improve the Delivery of Legal Services (6-credit hours)

In Spring 2015, Professor Jennifer Gundlach taught a six-hour experiential course entitled *Using Technology to Improve the Delivery of Legal Services*. This multi-component course included a weekly two-hour seminar and a weekly one-hour supervision meeting between Professor Gundlach and each of the student teams. Professor Gundlach had several learning objectives for students in her class, including understanding the contemporary access to justice issues in the civil legal system, learning how different technologies have been used to respond to the justice gap, understanding the ethical issues that may arise when using technology to deliver legal services, developing a HotDocs template and A2J Guided Interview, and gaining professional development skills for those interested in legal technology. In addition to the assigned A2J Guided Interview, her students completed various out-of-classroom assignments, including meeting with organizational clients, participating in related fieldwork and attending events to gain further insights about the work in the legal technology space, including visiting local legal tech start-ups and the annual Legaltech conference in New York.²⁵

²⁵ New York Legal Tech Week, <http://www.legalweekshow.com/legaltech/> (last accessed on Jan. 22, 2018).

Although the students in the class had uniformly positive feedback about the course, they were unable to produce an A2J Guided Interview that was ready for public use. This was due primarily to the large amount of course content in one semester. Professor Gundlach stated that if she offered the course again, she would offer it over a year, with two courses of three or four credit hours. Despite the substantial allocation of six credit hours in *Using Technology to Improve the Delivery of Legal Services*, there was simply too much to cover in the course both inside and outside of the classroom. The institutional client requested edits at each iteration of review so the class needed time to incorporate those suggestions. Additionally, the organizational contact reviewed both teams' Guided Interviews and suggested additional edits that could not be incorporated by semester's end. Because A2J Author 5.0 was still relatively new when Professor Gundlach taught the course, there were still software bugs, which affected both learning how to use the software and using it to develop the Guided Interview.

Like Professor Hagan, Professor Gundlach noted that a deeper understanding of A2J Author by the professor is key to future offerings of the course. While CALI and Chicago-Kent provided training in A2J Author, A2J Course Project Fellows using A2J Author in a course for the first time needed additional time to familiarize themselves with the software outside of the training environment. Even as Professor Gundlach expressed her appreciation for the level of technical support she received from Chicago-Kent and CALI, she had not yet felt fully comfortable with the software by the time she taught her course. Professor Gundlach also offered her course before the other fellows in the program so she did not have a peer group to whom she could turn for assistance or with whom she could share the experience of teaching an A2J Author course.

B. Practicum

IIT Chicago-Kent College of Law: Justice & Technology Practicum

The Justice & Technology Practicum taught by Professor Ronald Staudt at IIT Chicago-Kent College of Law served as the model course for the original A2J Clinical Course Project.

The Practicum is a hybrid course, fusing elements of a legal research and writing course, a seminar, and a legal clinic. The first part of the course is devoted to providing students with the foundational underpinnings of using technology to deliver legal services more effectively. Assigned readings focus on how technology may be disruptive to traditional legal practice and what ethical considerations are implicated when using technology in alternative legal service delivery. Students are also taught the importance of plain language, particularly when developing digital self-help tools for self-represented individuals.

The clinical portion of the course entails developing an A2J Guided Interview and corresponding HotDocs template for use by a “client” legal aid organization. To supplement the development process, students are required to complete fieldwork that will help provide context for the issues that self-represented individuals face when encountering a legal problem. Typically this involves courtroom observation or volunteering at the Self-Help Web Center (“SHWC”), a help desk at the Richard J. Daley Center courthouse staffed by law students to provide legal and other information to self-represented litigants. As part of their work at the SHWC, students help self-represented litigants use A2J Guided Interviews and other web-based self-help resources, particularly those found on Illinois Legal Aid Online, the statewide legal aid portal for Illinois. Additionally, students are expected to complete constituent assignments in furtherance of their A2J Guided Interview and HotDocs template. These include but are not limited to a scope

document, legal research memorandum, written storyboard, and final report. At the end of the semester, students present their projects to the class and invited guests.

Suggested Reading: Justice & Technology Practicum

Ronald W. Staudt & Andrew P. Medeiros, *Access to Justice and Technology Clinics: A 4% Solution*, 88 CHI.-KENT L. REV. 695 (2013).

University of Tennessee College of Law: Human Rights Practicum

Professors Robert C. Blitt and Valorie Vojdik taught the Human Rights Practicum at the University of Tennessee in Fall 2015. The course focused on the production of an A2J Guided Interview and HotDocs template for the [Tennessee Human Rights Commission \(“THRC”\) complaint](#). The Guided Interview provided information on housing, public accommodations, and Title VI discrimination and could automate the form depending on the type of discrimination the end user indicated. Professors Blitt and Vojdik structured the class around five central goals: “to teach the students about the substantive human rights law in Tennessee and to locate it within the larger body of human rights law in the national and international community; to expose the students to the gaps in access to justice and empower them to think creatively about how to bridge that gap; to create a guided interview that would assist individuals to seek redress for civil rights violations; to develop students’ skills in interviewing and fact investigation; and to encourage the students to think critically about the benefits and limitations of state human rights law.”²⁶

Professors Blitt and Vojdik structured their course in three parts: 1) teaching substantive law, 2) fact finding investigation by students, and 3) developing the A2J Guided Interview and

²⁶ Case study (on file with CALI).

HotDocs template. Students met for a two-hour session once a week. Professors Blitt and Vojdik noted that they would have scheduled more frequent sessions, at least two a week, in order to sustain student engagement and address issues pertaining to technical aspects of the project. From a broader standpoint, the professors felt that a three-credit hour semester was insufficient to fully accomplish all of their objectives without having to make some compromises. The professors sought to address the overarching theme of access to justice in Tennessee and elsewhere while also providing students with the practical experience of interviewing stakeholders and creating the Guided Interview and HotDocs template. Ideally, a year long class would better accommodate their objectives, however, this would require a greater commitment from their students.

To see sample resources from the Human Rights Practicum, see Appendix _____

The entire class worked on one Guided Interview and HotDocs template as a response to working with A2J Author for the first time and the desire to offer a Tennessee-centered course. Professors Blitt and Vojdik emphasized the tremendous training and technical support they received from the Chicago-Kent and CALI staff to improve their understanding of how to use A2J Author and HotDocs. To make the class's training more effective, they stated they would have liked to have seen the actual THRC Complaint used in the training sessions. Professors Blitt and Vojdik divided the class into three teams of two to four students, with each group assigned a particular portion of the form corresponding to one of the types of discrimination that could be alleged in the complaint.

Students in the course reported developing critical teamwork and communication skills as a result of working together on the projects. The collaborative work structure challenged students

to examine their own workplace habits and develop strategies for adapting to work with their colleagues. Students also reported developing skills in peer assessment, identifying the strengths of each team member in order to effectively delegate tasks to maximize their contributions. Professors Blitt and Vojdik did, however, note the challenges that assigning a single project created with respect to accountability and grading. For potential future iterations of the course, Professor Blitt and Vojdik would want to look into providing students opportunities to work on different human rights commission forms, particularly those from other states.

In addition to developing teamwork skills, students also reported improvement in time management and problem solving. Using A2J Author and HotDocs for the first time was not without its challenges, and the students learned how to identify problems and develop solutions. Those skills were developed in group brainstorming and problem solving sessions, which Professors Blitt and Vojdik felt were particularly effective for creative solutions.

Not only did the students learn to communicate well with one another, but they learned to communicate effectively with their client, the Tennessee Human Rights Commission, during the fact-finding phase of the course. Through those in-depth discussions, the students learned the on-the-ground challenges of administrative law. This made administrative law practice more real to the students, focusing the students' attention to the relationships between what Professors Blitt and Vojdik called "the aspirations of human rights law and the practical challenges."²⁷ Furthermore, the client-centered approach provided useful insights into question design, that is, how to draft questions in plain language, what contextual "Learn More" prompts to provide, and how to sequence questions to obtain the most useful information from the end user. Importantly, those lessons translated into critical lawyering skills.

²⁷ Case study (on file with CALI).

C. Legal Research

Advanced Legal Research: Stetson University College of Law (2 credit hours)

Professor Rebecca S. Trammell adapted her *Advanced Legal Research* course as part of the A2J Author Course Project. Students in the class create Practitioner Research Guides that provide information to an attorney who is dealing with a new or unfamiliar area of law. Professor Trammell structured the course with a special focus on client interaction, instructing her students to “include specific information needed from the client which is best presented in the form of a topic-specific client in-take form.”²⁸

Initially intending to incorporate A2J Author during the Fall 2015 semester when she taught the course, credit-hour and time constraints led Professor Trammell to instead offer pro bono credit to any students in the legal research course who would volunteer in Spring 2016 to automate a form in A2J Author. These student volunteers vetted potential automated forms by examining the practitioner guides created in the previous semester. After careful discussion between Professor Trammell and her students, they decided to focus on the issue of establishing paternity in Florida, ultimately deciding to automate the Florida Health Acknowledgement of Paternity in A2J Author. The resulting A2J Guided Interview was essentially a pro bono project offshoot from the legal research course.

Professor Trammell loosely structured the pro bono project to allow for scheduling flexibility. She and her student team communicated via email, phone, and held periodic in-person meetings to discuss the project. Professor Trammell also exchanged emails, had phone calls, and participated in remote video conferencing sessions with the A2J Author technical assistance team.

²⁸ Case study (on file with CALI).

Professor Trammell noted that teaching the A2J Author course was productive and that she and her students were glad to have participated in the A2J Author Course Project. However, she also expressed some frustration with the technical challenges she and her team faced. While Professor Trammell expressed that the programming capabilities within A2J Author are excellent, she noted challenges in translating course content into the actual A2J Guided Interview, such as ordering and linking steps and pages. Reflecting on the pro bono project, Professor Trammell noted that her team spent more time on the appropriate way to phrase a particular question within the Guided Interview rather than focusing on the technical aspects of developing the Guided Interview itself. Professor Trammell suggests a partitioned approach in which one segment of the team focuses on the substantive legal content while another segment of the team focuses on the technical aspects of developing an A2J Guided Interview. Under this approach, one group would draft the questions, and the other would put those questions and other content into the A2J Guided Interview.

Special Topics in Access to Justice: University of Missouri-Kansas City (UMKC) (2 credit hours)

Professor Michael Robak taught his A2J Author course, *Special Topics in Access to Justice*, in Fall 2015. Professor Robak had five students in the course, and those students were divided into two teams to create two distinct A2J Guided Interviews. One Guided Interview automated the Petitioner for Change of Name in Missouri while the other automated the Application for Services for the school's Entrepreneurial Legal Services (ELS) Clinic. With respect to scheduling, Professor Robak structured the course to allow for flexibility. The class met a total of four times in the semester (once each month between August and November),

supplemented by weekly check-ins, either by email or an in-person meeting with Professor Robak.

In formulating the two projects for the course, Professor Robak looked to what was needed in the community as well as by the school. Jackson County, Missouri, within which Kansas City is located, does not have a public county law library. The UMKC Law Library helps to fill that void by providing assistance to pro se litigants, who make up 70% of its visitors. Of the pro se visitors to the desk, roughly 40% seeks assistance filling out forms, and the most requested form is the name change form. Professor Robak already had the foundation for the Guided Interview, as he started a pilot program in 2014 to automate the name change form in an older version of A2J Author. Because of updates to the underlying form since 2014, Professor Robak's proposed update of the name change A2J Guided Interview would constitute a substantial project for one of his teams to work on during the semester.

The other project materialized out of a collaboration with the ELS Clinic. The two-student team initially set out to automate the not-for-profit entity formation process. However, the class adjusted the scope of the project because of the difficulty in scheduling appointments with clinic clients who sought to create a not-for-profit entity. Instead of the original project, the students automated the clinic's Application for Services.

The entire class genuinely enjoyed the opportunity to learn A2J Author in the course. Professor Robak did identify some challenges, however. The first was student recruitment and marketing. Professor Robak reached a final decision on teaching a fall course in the summer, but initial student registration for the fall had already completed by mid-March. Professor Robak targeted 2L and 3L students through an intranet posting and ultimately five students registered. Another challenge Professor Robak identified was three out of the five students used Macs so the

class needed a workaround to properly ensure that the students in the class could use HotDocs. In regard to using the software tools, Professor Robak noted the steep learning curve for HotDocs. Also because A2J Author is designed for developers across all experience levels, more experienced programmers may feel limited by A2J Author, as was the case with one student in Professor Robak's class who was dissatisfied with the limitation. Each team was able to develop an A2J Guided Interview, which served as proofs of concept because the LHI national server did not yet support A2J 5.0 Guided Interviews.

Echoing other A2J Author Course Project Fellows, Professor Robak underscores the importance for students to first gain familiarity and comfort using A2J Author. For a future iteration of the course, Professor Robak suggests a two semester format. In the first semester, students would focus on acquiring a deep knowledge of the A2J Author software and gaining familiarity with using it. The second semester would then be devoted to using that acquired skill set to work on a specific project.