

A2J Author[®]

Online Intake Series

Part III: Editing the Script & Managing the Variables

Editing the Script & Managing the Variables

Agenda

1. Create/Edit an Online Intake Interview Script
2. How to Use A2J Author to Create an Editable Script
3. Managing Variables
4. Additional Resources



Create/Edit a Script

Whether starting from scratch or borrowing an existing online intake interview from another program, review the script and get input from key stakeholders up front.

Tip: Create or edit script outside of A2J Author software first then easily paste text into software.



Create/Edit a Script

Use a word processor or Google Doc to track changes and leave comments

The image displays two overlapping windows illustrating document editing. The background window is a Google Docs interface for a document titled "ULS Online Intake Script". It shows a table with columns for "Hypertext" and "Popup text". The "safer computer" entry has a popup text that reads: "A safe computer is one that is in a safe location and does not have direct or remote access." Below the table, there are sections for "0: 1a5b - Secure Site.help" and "0: 1b --Name and Gender". The "1a5b" section includes text about computer safety and a link to "http://www.udvc.org". The "1b" section starts with "I am Ayla, your guide in this interview. To Let's begin..." and includes a red "required." label. The foreground window is Microsoft Word in Compatibility Mode, displaying a document titled "Cynthia_comments_on_legal_aid_script_May_21_2009[2].doc". The ribbon shows the "Review" tab, and the text area contains the same "1: 1b - No Residence" section. A red comment box is visible on the right side of the text, containing the text: "Comment [C1]: Do you mean to say if you are NOT in one of these counties?". The Word status bar at the bottom indicates "Page: 10 of 45" and "Words: 7,016".



Create/Edit a Script

Use table, spreadsheet or Google Doc to create columns for changes and comments

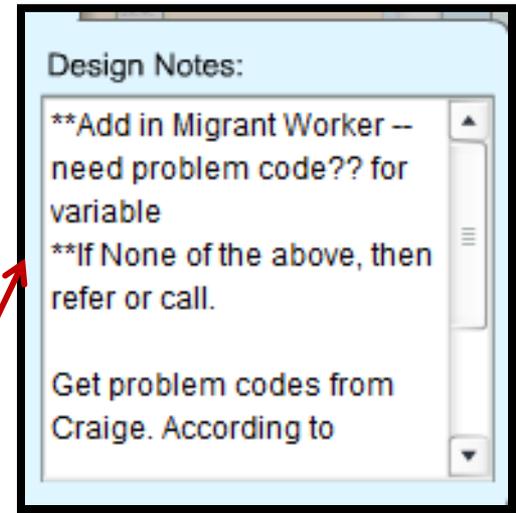
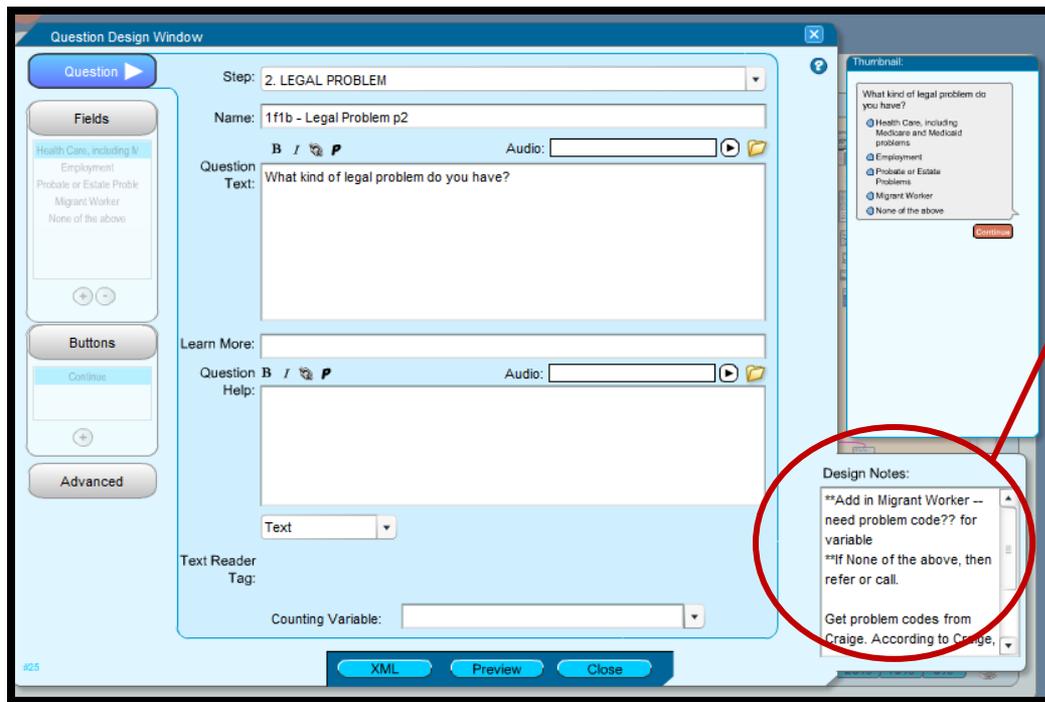
The image displays two overlapping windows illustrating how to create and edit a script. The background window is a Google Docs spreadsheet titled 'A2J Spreadsheet' with columns for 'Question', 'Q Type', 'Change from', and 'Change to'. The foreground window is a Microsoft Word document with a table containing 'Questions', 'Suggested Text', and 'Comments'.

Questions	Suggested Text	Comments
0: 1-Introduction Welcome to the Illinois Security Deposit Information Guide. This interview is about your security deposit.	This guide will help you learn your rights and how to get your security deposit back.	
Answering these questions will let us determine what rights you have and what you may need to do next.		Remove, duplicative of new language above.
0: 1-Introduction.help What if I want to sue my landlord?		Maybe add "to get my security deposit back"

Create/Edit a Script

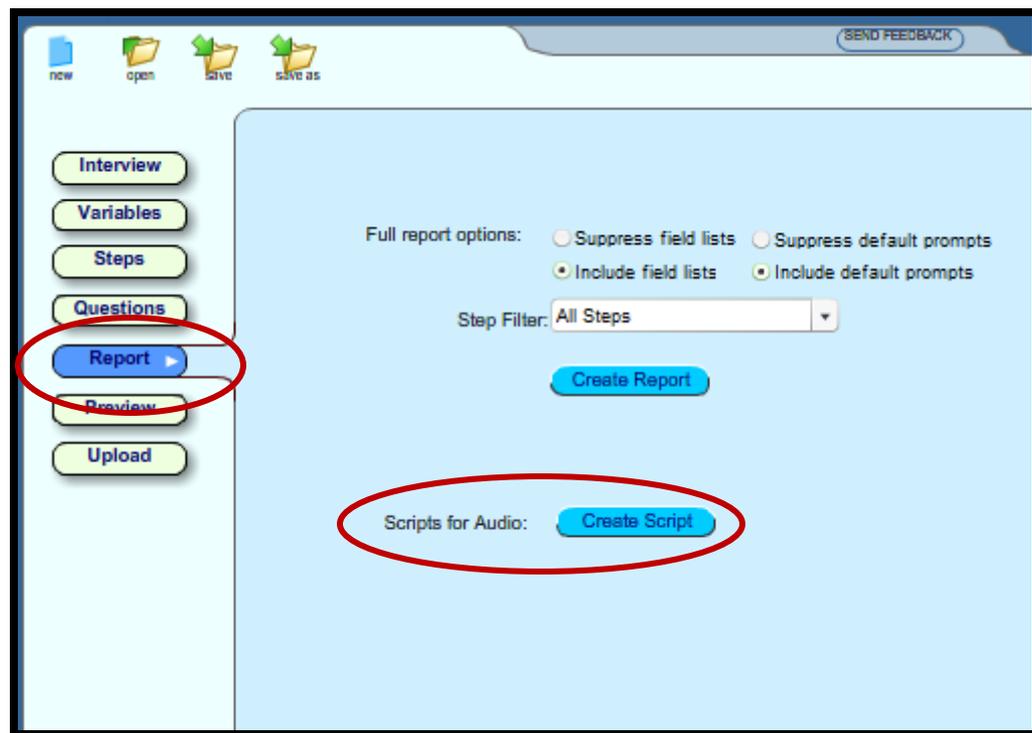
Use A2J Author to take notes and leave comments.

Tip: Also good for testing and leaving notes about complex logic.



Using A2J Author to Download a Script

How do you get the text out of A2J Author from a borrowed or already created interview?



Scripts for Audio includes only the text of the interview.

Full Report also includes: metadata, list of variables, list of steps, details of questions including field lists and prompts



Using A2J Author to Download a Script

Script for Audio opens a web browser with all text seen by end-users.

Step & Name

Question Text

Popup Text

Learn More Help Text

The screenshot shows a web browser window titled "Utah Legal Services Online Intake - Windows Internet Explorer". The address bar shows the file path "H:\VWC\A2J_Author\TIG 2010-09478-UTAH-Intake\ULSONli". The browser displays a form titled "0: 1b1 - Name and Gender". The form content includes:

Let's begin.

Please tell me your [full legal name](#) and answer the other questions below (questions in red are required).

If you are helping someone else apply for assistance, make sure you provide the information requested for the person with the legal problem.

Hypertext	Popup text
full legal name	Use the name on your birth certificate unless it has been legally changed when you were married or by court order.

Field	Prompt
First Name: (text)	I need more information. You must type a response in the highlighted field before you can continue.
Middle Initial: (text)	I need more information. You must type a response in the highlighted field before you can continue.
Last Name: (text)	I need more information. You must type a response in the highlighted field before you can continue.
Jr./Sr./etc.: (text)	I need more information. You must type a response in the highlighted field before you can continue.
Gender (gender)	You must choose either male or female from the highlighted selection before you can continue.

0: 1b1 - Name and Gender.help
What if I am assisting another person to complete this interview?

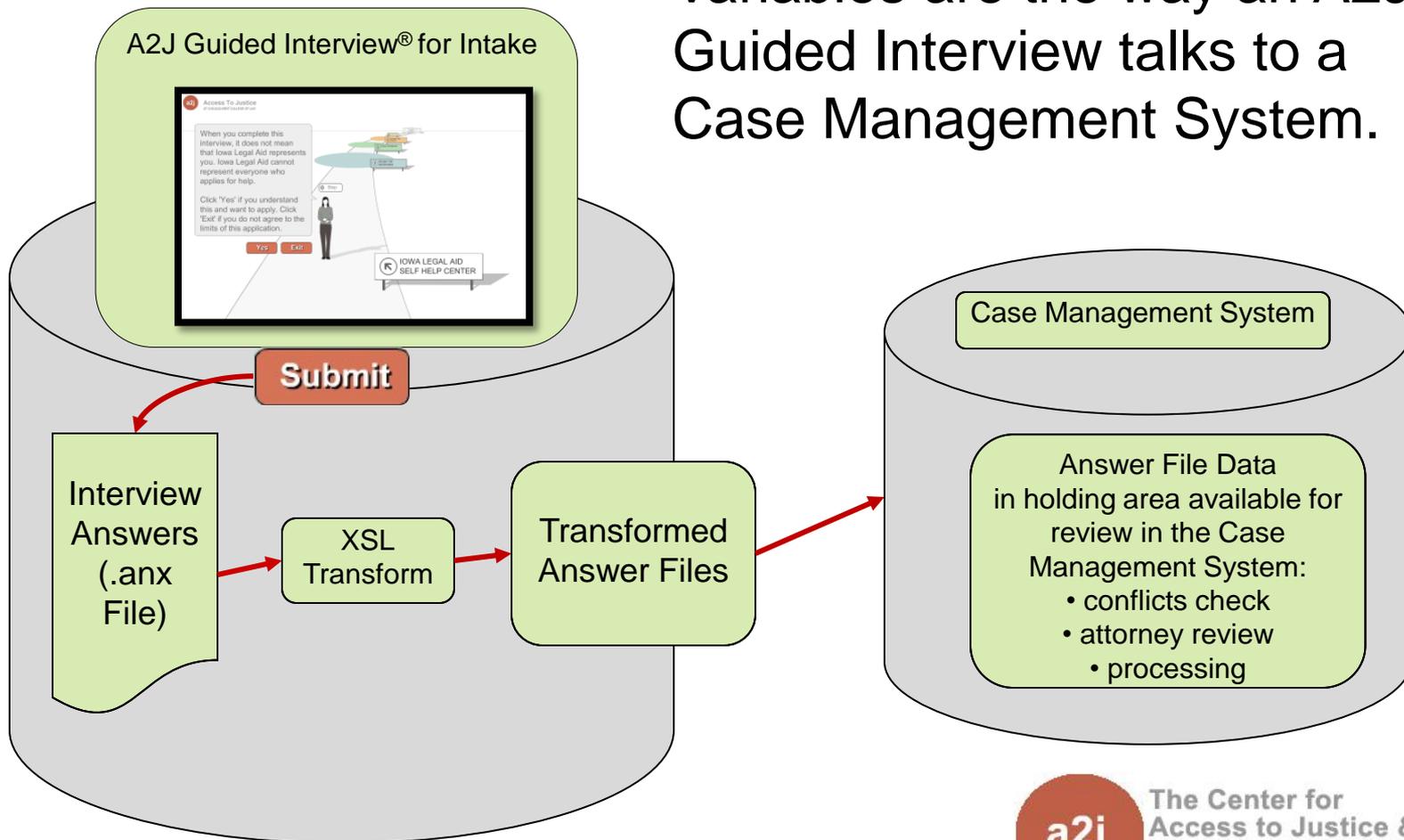
Although you are welcome to fill out the interview for someone else if you have all the required information, keep in mind that ULS cannot talk to you if you are not the person who is actually experiencing the problem.

Local intranet | Protected Mode: Off | 75%



Managing Variables

Variables are the way an A2J Guided Interview talks to a Case Management System.



Managing Variables

Create a spreadsheet or Google Doc listing CMS variable names & coordinating A2J variables

	A	B	C	D	E
1		Description	Comments/Questions	A2J	
2		Eligibility Table			
3	Casenum	Case Number		-	Red=something that is in more than one table that we don't need to collect (generated by Utah)
4	SNUM	Staff Number		-	Yellow=shared by different tables and need to collect
5	Eligible	Eligible for Full Case	This does not need to be collected by the interview. Sorry for the error.		Black=appears in one table and need to collect
6	Dopen	Date Opened	"DOPEN" would be the date interview is completed (formatted as xx/xx/xxxx)	Dopen DA	*Note to Craig from Rachel (9/4/2010): I am going to highlight in light blue anything I have not yet collected in the interview and which needs to be further defined before I can add it in as a variable.
7	Pcode	Problem Code	2 digit # e.g., 63	Problem Type MC	My answers are highlighted in purple
8	Adults	Number Adults in Household		Adults Served NU	
9	Children	# Children in Household		Children Served NU	
10	CFname	Client First name		User First Name TE	Question
11	CLname	Client last name		User Last Name TE	
12	CMi	Client middle initial		User Middle Name TE	
13	Ext	Jr. or Sr., etc.		User Name Suffix TE	
14	Income1N	Income Note	Employment + Self Employment (add individual labels to a variable that maps to this note variable in Kemos)	Income1N TE	



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?



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