A2J Author®
Online Intake Series

Part V: Up and Running
Where does the information go and what happens next?

Chicago-Kent College of Law
ILLINOIS INSTITUTE OF TECHNOLOGY

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Guest Speakers

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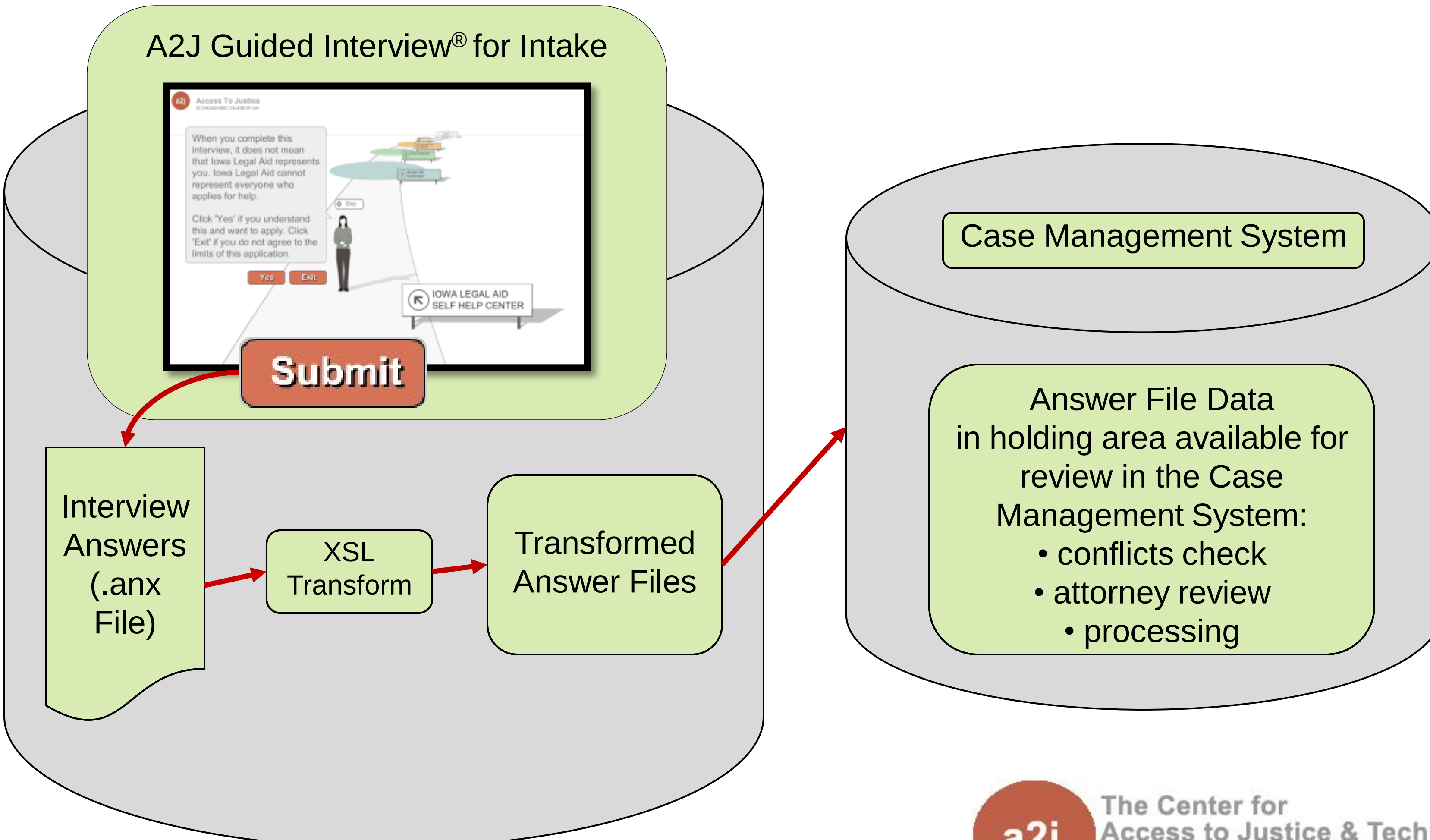
Up and Running

Agenda

1. Online Intake with A2J Author® Review
2. Up and Running: What Happens Now?
   1. Who processes these?
   2. Where does the info go?
   3. How much upkeep is there?
3. LSC Activities Around Online Intake
4. Additional Resources

Online Intake Process



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Online Intake Development

- **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 & process online applications
  - Go Live – success!

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What Happens Next?

Questions your program might have at this stage:

- Who will process the online applications?
- What happens once the application is received? Where does the information go?
- How much upkeep is there?

Who will process the online applications?

- **Q – Do programs need to hire new staff?**
- A – No. Programs already running online intake report that they do not receive more applications. Applications simply come in via a different avenue.
  - In fact staff also report less time spent per applicant allowing them to process more applications in the same amount of time!
  - Ideas: 1) Rotate staff in charge of online apps by day or week, 2) Designate one online intake person.

- **Q – Does staff need special training?**
- A – Only to the extent the online intake process varies from the regular intake process.
  - Program qualification policies should remain the same, how to conflicts check, etc. However staff need to learn the new technology areas such as way the application is received, how to review it, etc.

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What happens to the information once received?

- **Q – Where does the applicant information go?**
- A – Many options: 1) straight into CMS, 2) into holding area of CMS, 3) into separate database.
  - Also have the possibility of not connecting online intake interview with CMS, instead applicant can bring in, mail in, or email application. This requires the online intake application to be a document assembly process with a partnered HotDocs template.

- **Q – What about conflicts, do we have too much information?**
- A – Prior to conflicts checking can hide all information not needed to run conflicts.

What happens to the information once received?

- **Q – Do all applicants get a call back? Letter? Email?**
- A – Programs need to determine what level of applicant gets what type of response.
  - Call Back – Applicants that appear to qualify or those in a grey area.
  - Letter/Email – Applicants that do not qualify. Can program CMS to automatically generate letter.
  - No response – Applicants filtered out due to finances or redirected based upon problem type. Could possibly just flag these applications and still follow up.

- **Q – Where does data of rejected applicant go?**
- A – Many options: 1) immediately purge all data, 2) keep enough info for reporting purposes & purge rest, 3) keep in database separate from CMS, 4) keep for set period of time then purge.

How much upkeep is there?

- **Q – How often should programs update the online intake interview?**
- A – At least as often as client qualifications change.
  - In the beginning programs might want to update more often, things that are clear to staff might not be clear to users once up and running. Also, users are likely to find issues no matter how much testing is done.
  - Upkeep Saving Tip: Program for the future. For example, do not put in hard limits on dates that have to be updated each year, use the A2J Author function TODAY to always have the most current date.
  - Upkeep Saving Tip: Ask intake staff to review script because they have the most contact with applicants.

- **Q – What about bug/error reporting?**
- A – Programs should have a way for applicants to submit error reports and have a process in place of what to do with those reports.
  - Determine who is responsible for screening the error reports and how often, also who performs the interview changes.

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  - Upkeep Saving Tip: Program for the future. For example, do not put in hard limits on dates that have to be updated each year, use the A2J Author function TODAY to always have the most current date.
  - Upkeep Saving Tip: When developing the intake script get input from the intake staff. They have the most contact with applicants and will know if something might be confusing to them. Also include intake staff intesting the interview.

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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

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Questions? Feedback?

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