

CLEAR*Online



Submitted by: Northwest Justice Project

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*Final
Report
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I. Project Goals and Objectives

The Northwest Justice Project (NJP) was awarded this 2-year grant in January of 2010. The primary goal of the grant was to “Increase applicants’ access to services, the number of clients served on high-priority issues and NJP’s operational efficiency by developing and implementing a new on-line intake system.”

This goal was successfully achieved by:

- Developing and implementing an on-line intake system with an A2J interface and triage tool that enhances clients’ access to services and increases the assistance NJP provides clients on high priority eviction and benefits cases and
- Developing an e-transfer module that electronically transfers information from the on-line interview into Legal Server, the case management system, thereby increasing the efficiency of NJP’s client intake process.

NJP researched what other states had accomplished with regard to online intake, specifically Ohio and Utah Legal Services, and set about strategizing and developing our own online interview-triage tool to successfully provide the following:

- Enable applicants to easily enter necessary information on-line into the application for NJP services
- Provide preliminary eligibility determination with regards to financial and legal problem category
- Provide applicants with appropriate resources and information based on preliminary eligibility determination
- Trigger follow-up by NJP staff to applicants with high priority housing and benefits-related legal problems
- Develop and implement communication and logic protocol between the A2J interview and Legal Server, NJP’s case management system that enables intake screeners to seamlessly e-transfer completed on-line application information into the Legal Server Case Management System (CMS) database

NJP has been operating a toll-free intake and referral hotline called CLEAR (Coordinated Legal Education Advice and Referral) since 1996 and handles more than 20,000 calls per year. CLEAR serves as the statewide, centralized point of access for Washington State’s low income population seeking free legal help.

CLEAR*Online went “live” on February 14, 2012 as an additional point of access for potential clients. After just 2 months, the number of clients with high priority denial of government benefits and eviction issues entering NJP’s intake system has already increased by 23% thus showing how this alternative to telephonic application for legal help with high priority problems was greatly needed.

II. Evaluation Data and Methodologies

NJP is using several forms of qualitative and quantitative data to measure the usefulness of the online intake system including low income user testing, surveys, and Legal Server statistics.

User testing: The project team tested the intake system with three low income individuals, on site, at our Seattle office on February 15, 2012. We provided each person with two scenarios and asked them to create a third one by themselves. (Scenarios attached) Three NJP staff stood in back of the testers and answered any questions they had after each intake was completed. This was very helpful. They had some excellent comments and suggestions many of which have been implemented. A list is attached siting the impressions and suggestions. Overall, the testers thought the system was very easy to use and the interview questions easy to understand.

Surveys:

- NJP Staff survey: All screeners and CLEAR advocates were surveyed to inquire as to the online intake system's effectiveness and efficiency (survey attached- 20 completed).
- User Survey: We have developed a User Survey to track the usability of the system and suggested improvements. The link is presented both on NJP's website page where the online system link is located and at the end of the application. To date, over 185 users have commented. Survey and comments attached.

Statistics and Reports:

- Number of people using on-line application
- Times of day on-line applications are submitted
- Number of people who complete the on-line application as original application vs. attempting to call first
- Number of users sent to each triage branch
- Percentage of clients with high priority housing and benefit problems served before and after implementation of on-line system
- Call back response times

III. Summary of Major Accomplishments, Recommendations and Future Steps

The primary goal of this grant was to provide an additional means of entry into the CLEAR intake system for those people experiencing denial of benefits or eviction problems. We consider these high priority cases and wanted to try and alleviate the frustration of low income people with these serious problems getting busy signals when calling the toll free number and giving up. With the introduction of CLEAR*Online, our primary and secondary goals have been successfully accomplished as evidenced by:

- A 23% increase in the numbers of benefits and eviction cases handled since CLEAR*Online launched.
- Reduction in the numbers of ineligible applicants calling, by allowing people to undergo a preliminary screening to determine whether they will likely qualify for our services
- 86% of the screeners report faster intake screenings achieved by transferring answers from the online intake interview into Legal Server, our case management system;
- All online applicants, whether they qualify or not, are provided with other sources of legal information, including publications, web resources, and outside organizations based on the information they provided.
- 63% of the 1570 applications that passed the preliminary eligibility check and were available for e-transfer were completed outside of CLEAR's normal hours of operation. (310 have spoken with a CLEAR screener or advocate and have been imported into NJP's Legal Server database)
- 100% of the clients with high priority cases who had requested a callback and whom we reached were called within 48 hours.

The number of cases that we handle is limited by the number of staff. This system was not developed to increase our overall case numbers but to attempt to get the right and most critical cases to the CLEAR advocates so their time can be spent most efficiently. The online system was primarily developed by an NJP team including the Director of CLEAR who is a national hotline expert, a CLEAR advocate (lawyer), a CLEAR screener (non-layer), our IT Systems Administrator, and the Director of Administration. This diverse group contained expertise on technology, NJP's intake system, alternative legal resources, and Legal Server, all of which were critical to the success of the project. What came as a surprise was how long and complicated it was to create the logic for the system that we envisioned. Major accomplishments in designing the logic included the following:

- Extensive branching for our priority areas (housing and government benefits) to determine if the applicant's specific legal problem was a high enough priority to warrant CLEAR calling the applicant back (thus allowing them to skip the CLEAR phone queue entirely)
- Determining which government benefit problem areas enabled us to reasonably assume that the applicant would financially qualify, enabling us to skip the financial screening within the online application (CLEAR screeners would still ask the standard financial questions as part of the phone interview);

- Determining the appropriate legal resources (publications, WashingtonLawHelp pages, other websites, outside organizations, etc.) were appropriate to offer the applicant at the end of the interview for each step along the way.

This extensive branching logic was created using a diagramming tool which was easy to follow visually and can be used as a template for further development by other LSC programs considering online intake as well as by NJP if at some point in the future we decide to target additional high priority areas.

IV. In-Depth Analysis of Accomplishments

The goal of this project was to:

“Increase applicants’ access to services, the number of clients served on high-priority issues and NJP’s operational efficiency by developing and implementing a new on-line intake system.”

The objectives employed to achieve this goal were:

- Develop and implement an on-line intake system with an A2J interface and triage tool that enhances clients’ access to services and increases the assistance NJP provides clients on high priority eviction and benefits cases and
- Develop an e-transfer module that electronically transfers information from the on-line interview into Legal Server, the case management system, thereby increasing the efficiency of NJP’s client intake process.

This was a two-year project, with development largely occurring in the first 20 months followed by testing and fine-tuning. PSTI, NJP’s partner on this project, handled both the A2J programming and code development to import data from the A2J interview into Legal Server’s already existing electronic case transfer module. (This e-transfer functionality was previously developed for NJP to enable us to transfer cases *out* to other referral agencies in the state.)

A. Developing CLEAR*Online:

NJP developed our online intake and triage system by successfully accomplishing the tasks below:

- Build the application by developing logic branching, interview questions, help screens and the resources and web links relating to each specific legal problem codes or category. See attached documents:
 - Legal Problem Triage diagram
 - Financial eligibility diagram
 - Overview Flowchart diagram
 - Questions.xls spreadsheet
- Develop and test the code for transferring information into Legal Server
- Create an internal procedure to process online applications for service
- Test the triage tool
- Build a function to push pro se information and information about alternative legal resources.
- Test, Test, Test
 - See Test plan.xls
- Advertise and Evaluate

Northwest Justice Project (NJP) designed and successfully created the on-line application and triage tool, called CLEAR*Online:

- The system fully integrates with the Legal Server case management system used by over 40 LSC programs nationwide.
- CLEAR*Online will accept applications for service, perform a financial eligibility check and determine, depending on the type of legal problem, whether the CLEAR hotline staff will call the applicant or if the user will need to call CLEAR.
- No matter what the outcome, the system will provide information and/or links that will help the user address his or her general legal issue.
- NJP now offers an alternative to calling the overburdened toll free number for legal help with high priority problems.
- By informing the applicant that we do not handle their type of case or that they are over-income, it also helps with the overwhelming volume and random nature of telephonic intake.

To date after 10 weeks on line:

- Over 2200 people have completed the online application; of those, 1570 have passed the preliminary eligibility check
- 310 have reached the CLEAR screeners and talked to a human being regarding their eligibility for NJP services and/or were assigned to an attorney.
- 23% more clients with NJP’s targeted high priority areas surrounding denial of government benefits and eviction ha entering the intake system
- Call back response times: We attempt to callback all applicants the next business day. Of 134 callbacks where we reached the applicant, 39 were the same day, 93 were within 1 day, and 115 were within 2 days. The longer periods are likely due to weekends and missed calls.

| Online Intake applications in Legal Server: 2/14/2012-4/22/2012 | | |
|--|-----|--|
| Case Disposition | | |
| Closed | 143 | These clients received services from an attorney and their case is now closed. |
| Incomplete Intake | 2 | Calls still in callback queue |
| Open | 42 | Assigned to an attorney |
| Rejected | 123 | Applicant did not qualify (see chart below) |
| Grand Total | 310 | |

Applications Rejected by CLEAR Screeners - Reason

| | | |
|----------|--|-----|
| Rejected | Abandoned or Incomplete/No Show | 14 |
| | CLEAR Internal Transfers Pilot No Answer | 1 |
| | Conflict | 11 |
| | Duplicate Case | 3 |
| | Financially Ineligible (the online system is set at 300% of poverty) | 31 |
| | Ineligible Alien | 1 |
| | Legal Information Only or No Advice Given | 5 |
| | Out of State Legal Issue | 4 |
| | Outside Priorities | 42 |
| Total | | 123 |

CLEAR*Online was designed to allow the user to complete the initial intake process and be directed to self-help legal information pending contact with an attorney. For example, a person who returns home at the end of the day on Friday to find an eviction notice posted on the door could use a computer at home or a local library to submit an intake application on Friday evening. The on-line intake system would accept the application and immediately provide links to relevant legal information that might help the tenant preserve legal rights, information that otherwise might have been unavailable to the client until Monday. On-line intake and triage tools designed to interface with the Legal Server case management system had not previously been developed.

NJP adapted the A2J interviews created by Legal Assistance of Western Ohio and Utah Legal Services to create our own friendly, visually appealing user interface. The interview “sits” on top of a free-standing instance of Legal Server (separate from NJP’s instance of the Case Management System), which temporarily stores basic information about the applicant. At each step of the online application process, the system sequentially assesses and verifies whether individuals should proceed further based on the branching logic that we developed. For instance, the system will determine that the user’s problem is in the State of Washington and that it is a “qualifying” legal issue before obtaining other qualifying information such as financial eligibility.

If the applicant fails to qualify under any of NJP’s basic eligibility requirements (e.g., out of state, income over 300% of the federal poverty level), the system will, as appropriate, provide relevant information and/or redirect the user to alternative resources such as a lawyer referral program and/or link to other relevant on-line resources such as WashingtonLawHelp or government agency websites. People with eligible legal problems that do not fall within our targeted high priority area, are encouraged to use the online system but are informed that they will still need to call CLEAR. “Should I apply online or call your phone number?” appears on the NJP website www.nwjustice.org/get-legal-help, the entry point for online intake, just above the CLEAR*Online link to start the interview. Although we continue to clarify the information, we have found as a result of the user survey that many applicants are still not clear as to who will call who after completion of the online application and mistakenly wait for a call from CLEAR

or are surprised to discover that they still need to call CLEAR. In order to make this and other important information easier to understand, we have created a short 2 minute animated video to provide the information in a more popular medium. (Script attached) The video link is located just above the “Go to CLEAR*Online” link.

The screenshot shows the Northwest Justice Project website in a Mozilla Firefox browser. The page title is "Get Legal Help | NW Justice - Mozilla Firefox". The address bar shows "nwjustice.org/get-legal-help". The website header includes the Northwest Justice Project logo and navigation links: "EN ESPAÑOL", "SUPPORT NJP", "CONTACT US", "INTRANET", and "HOME".

The main content area is divided into three columns:

- Get Legal Information:** Visit [Washington LawHelp](#) for free legal publications and self-help packets.
- Get Legal Help:** [Apply Online](#) or call the **CLEAR Hotline** to find out if you qualify for free legal aid.
- Recent Cases:** The **2011 Annual Report** is now available! Read about NJP's [recent case work](#).

On the left side, there is a "Browse Our Site" menu with the following items:

- » About Us
- » Services
 - » **Get Legal Help**
 - » What We Do
 - » Our Priorities
 - » Client Complaint Procedure
 - » Community Outreach
- » Employment
- » Volunteer
- » Law Students
- » News
- » Alliance for Equal Justice
- » Support NJP

Below the menu is a "Special Bulletins" section with the following text:

Apply Online for Legal Assistance with **CLEAR*Online**

Check out the new **NJP YouTube Channel** featuring foreclosure mediation videos! More videos are in the works so subscribe to receive updates.

New Foreclosure Law - If you

The main content area features a "Get Legal Help" section with the following text:

Do you need written legal information or self-help packets? Information about your legal rights and self-help legal packets including court forms can be found online at www.WashingtonLawhelp.org.

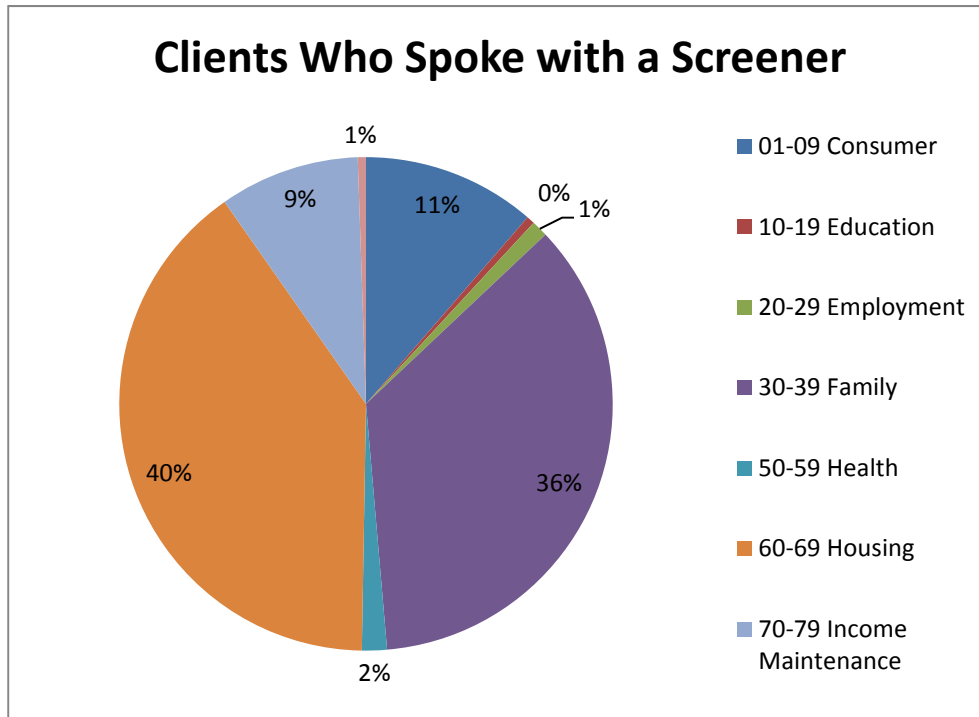
Do you need to speak to an attorney? CLEAR is Washington's centralized intake, advice and referral service for low-income people seeking free legal assistance with civil legal problems. You can begin the screening process by calling our toll-free phone number or through CLEAR*Online.

Below this text is a video player for "CLEAR*Online". The video player has a play button and a progress bar. Two blue arrows point from the video player towards the "Should I apply online or call your phone number?" section.

Should I apply online or call your phone number?

- » **Government benefits or loss of housing** (most problems in these categories): If you complete an online application and appear to be eligible for our services, we will offer to call you between 8:15 AM and 4:00 PM, Monday through Friday.
- » **Other legal problems, including family law:** We will not call you; you must call CLEAR. However, completing the online application provides some benefits:
- » Our phone lines are open for limited hours and are very busy. The online application will help you determine if you qualify for our services and whether you should call CLEAR.

B. Callbacks - Who Calls Who?



As seen from the chart above, approximately 51% of those clients who completed the online application did not have targeted high priority problems. They were instructed to call CLEAR, successfully braved the CLEAR busy signals, and talked to an NJP screener to complete their eligibility interview.

Applicants with targeted high priority problems (49%) have a different experience. Those with most types of government benefits problems where it is assumed, since they are receiving government benefits such as TANF, that they will financially qualify, go through what we have coined a “quick app”. Our primary goal is to get these clients into the NJP system as fast as possible and eliminate the possibility of losing them during the online financial interview process. Once we have verified that they live in the state of Washington and they have a benefits problem, they are presented with a screen informing them that this is a problem that we generally handle and that we will call them back. They are given a choice of three time periods to receive the call and asked for the best phone number where they can be reached. These applicants are referred to as “callbacks”. Applicants with housing problems such as eviction, which is also a targeted priority, still must proceed and go through the financial screening phase before a call back can be offered. In addition to the time slot choices, applicants who qualify for a callback are also given the choice to call CLEAR themselves if a callback is not convenient. This however makes counting callbacks slightly difficult as they appear as “Client Calls CLEAR” in the database.

Callbacks are performed by a CLEAR non-attorney screener. A crucial part of this project was the development of the screener procedure for CLEAR*Online. The callback process is briefly explained below: (The full Screener Procedure is attached.)

- 1) The screener calls the applicant during the applicant's preferred callback time.
- 2) If the screener is unable to reach the applicant after repeated attempts, the transfer is rejected, which removes the applicant's record entirely from Legal Server so they will not show up in conflict checks.
- 3) If the screener reaches the applicant, the screener accepts the transfer into NJP's instance of Legal Server and then begins the standard intake process. The screener verifies all information entered by the applicant on-line and completes all vacant fields.
 - a. Financial eligibility including income and assets: These fields will generally be filled in from the online intake, in which case they only need to be verified. However, in some circumstances, the online application skips financial questions (as in a quick app), in which case the screener must complete these fields manually.
 - b. Citizenship/Immigration: This question is not included in our online application, and must be completed manually by NJP staff. Where an applicant is a non-citizen, the immigration eligibility status is determined by an advocate, not a screener. Citizenship and immigration status are mandatory fields in LS, and the intake cannot be completed if they are not filled in.
 - c. Conflict Check: This will be done pursuant to our normal intake protocol.
- 4) If the applicant is eligible (or immigration eligibility status must be determined by an advocate) and has a problem within NJP's priorities:
 - a. If the CLEAR line is open, the screener queues the call at high priority to speak with an advocate ;If the CLEAR line is closed, the screener arranges for the applicant to speak with an advocate either through a scheduled phone appointment or through priority queuing when the line is open
- 5) If the applicant is not eligible or has a problem outside of NJP's priorities:
 - a. The intake is rejected and if appropriate, the applicant is referred to another provider of legal assistance or WashingtonLawHelp

Equally important was getting screener input while developing the interview questions in A2J. As part of this grant, NJP hired an additional part timer screener to handle the callbacks to clients with targeted high priority cases. Two months prior to launch, NJP increased one of the veteran part-time screeners to full time and added him to the development team. As a screener, he spends all of his time talking to clients and knows what intake question areas cause confusion and what "wording" is best to use in the online interview to alleviate these problem areas. This information was invaluable. In addition, the screener was added to the testing team so he would be intimately familiar with how the logic was structured to make the system work.

C. Legal Server Integration and e-Transfer

The second objective in developing the online system was to "Develop an e-transfer module that electronically transfers information from the on-line interview into Legal Server, the case management system, thereby increasing the efficiency of NJP's client intake process."

All of Washington’s civil legal aid providers have been using Legal Server as their case management system since June 2008. CLEAR is a centralized intake system and has been e-transferring information from NJP’s instance of Legal Server to the other providers when we refer them a case for the past four years. PSTI successfully created an API so that A2J and Legal server could exchange information and then used the same e-transfer functionality that we use today to transfer information from the online intake instance of Legal Server to NJP’s Legal Server database. Applications completed through CLEAR*Online appear under the “electronic transfer tab” on the “Cases” page of Legal Server (see below). This list is accessible to all NJP staff. Most of the applicant’s information remains in the other instance of Legal Server and is not brought into the NJP database until a screener imports the case to do a callback or the applicant comes through on the CLEAR line. Both screeners and CLEAR attorneys inquire of all callers if they completed the application online and if so, finds and seamlessly imports the information into NJP’s version of Legal Server. The screeners and CLEAR attorneys were trained on this process.

The diagram below shows the “Cases” page in Legal Server and displays the information seen under the electronic transfers tab. The “Originating agency” is Washington Online Intake and “A2J Application type” shows if the applicant will call CLEAR or if a CLEAR screener will call them as a **Callback**. (Callbacks, for targeted high priority cases such as TANF, are in red so the screener can find them easily. The time slot selected by the applicant tells the screener when to call.)

| Identification Number | Name | County of Dispute | Legal Problem Code | Special Legal Problem Code | Originating agency name | Date of request | A2J Application Type |
|-----------------------|-----------------|-------------------|--------------------|----------------------------|--------------------------|-----------------------|---------------------------|
| 12-0002640 | Test DoNotCall | N/A | 71 TANF | 710 TANF | Washington Online Intake | 04/13/2012 at 4:52 PM | between 8:15am and 9:00am |
| 12-0002641 | Test DoNotCall2 | N/A | N/A | N/A | Washington Online Intake | 04/13/2012 at 4:56 PM | Client Calls |

The client with the high priority TANF problem in the above example will be called back between 8:15am and 9:00am within 3 business days although most callbacks take place the following day.

› We are going to call you

Someone from Northwest Justice Project's CLEAR hotline will call you soon to discuss your application. Please see the sections below for additional links and documents you may find helpful. If we haven't spoken with you within 3 business days, and you still need assistance, please call CLEAR at 1-888-201-1014 Monday - Friday between the hours of 9:10 AM and 12:25 PM.



Internet Resources

Here are some other internet resources, which you may find helpful to visit.

| Resource name | Description |
|---|--|
| Washington LawHelp - TANF | |
| CLEAR*Online Survey | Please help us improve our application by taking this brief survey |

The second example listed under the electronic transfers tab was a family law case. This is not a targeted high priority case for the online intake system. The applicant went through the entire application, was found to financially qualify and instructed to call CLEAR. (“Client Calls”) The applicant received the following information sheet with resources after being presented with a message screen informing them that we would not call them but, if they call CLEAR, we may be able to help them with their legal problem

CLEAR*Online



Northwest Justice Project

› Please call the CLEAR hotline

Call the Northwest Justice Project's CLEAR hotline at 1-888-201-1014 Monday - Friday between the hours of 9:10 AM and 12:25 PM to find out what legal help is available to you. One of the resources below may answer your questions or help you resolve your problem.



Internet Resources

Here are some other internet resources, which you may find helpful to visit.

| Resource name | Description |
|---|--|
| Washington LawHelp - Family | |
| CLEAR*Online Survey | Please help us improve our application by taking this brief survey |

CLEAR*Online is proudly sponsored and supported by:

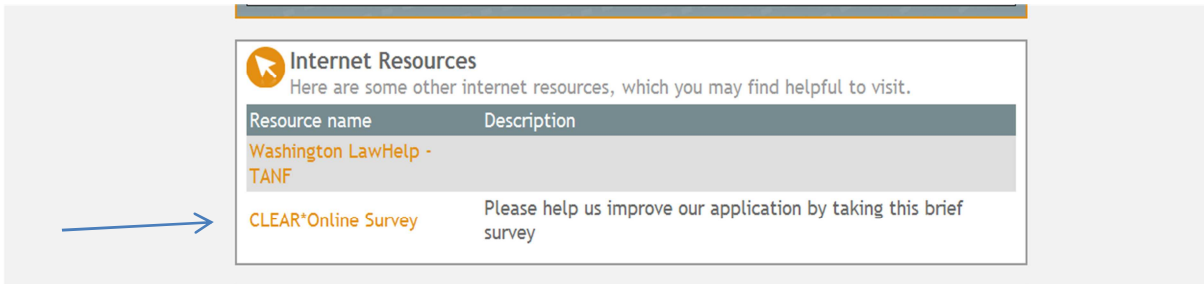


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D. Surveys and Input

Online User Survey:

NJP's success in this project cannot be measured by statistics alone but must take into consideration user opinion and feedback. In the first 2.5 months, 177 users have completed the short CLEAR*Online user survey. The survey can be accessed from the NJP website and the resource information sheet that is provided to the applicant at the end of the interview.



The survey results give us continuing and vital information leading to improvements to the online system. A summary of the results to date are below:

- 24% of the applicants found the CLEAR*Online link on the NJP website, 23% WashingtonLawHelp, 11% search engine like Google
- 36% called CLEAR first before completing the application, 64% did not call first
- 84% of the applicants thought the online application was easy to use
- 82% of the applicants would recommend the system to friends and family
- Applicants had the following legal problems: Family 51%, Consumer 16%, Housing 11%, Benefits (5%) etc.
- 2/3 of the applicants found the resources and websites presented at the end of the application to be useful
- Open ended: While most of the 90 applicants submitting comments suggested no improvements were necessary, a small number of comments suggested that there was confusion surrounding callbacks to the applicant. NJP created the video described previously to present this information in a different way.

Staff Survey:

After the online intake system had been functioning for 2 months, the screeners and CLEAR attorneys were asked to complete a short survey to determine the efficiency of the system and if any changes needed to be made. The results were very positive with regards to the effectiveness and improved efficiency of CLEAR intake and encouraged us to continue to offer this additional channel of access for clients. A summary of the survey results is below: (full survey attached)

- 86% agreed that the screening was faster when screening a client for eligibility who has already completed the online application. A very important comment came from the screener supervisor who confirmed the efficiency of the system:

I do not personally take calls, but I supervise our nine screeners. We have discussed how on-line call-taking is working in screener staff meetings. All the screeners agreed that it works more quickly when an application has been started on-line, due to things like the difficulty spelling names and addresses. Some of the applicants express their distress that they were not called back by NJP.

- 71% agreed that upon review, the information submitted by the applicant, is generally accurate

Some of the reported errors in Income, Assets, and Family Size are likely due to certain complex family situations where we found it very difficult to program the system and realized that in these complicated scenarios, the screener would need to make these determinations. In order to avoid making an incorrect financial assessment in these scenarios, we perform a preliminary financial screening, but do *not* pass the information through to Legal Server. This helps prompt the screeners to ask these questions from scratch, rather than merely confirm the answers.

Although the online intake system has only been functioning for 2.5 months, it has already shown to be successful with regards to:

- More targeted high priority cases getting into the NJP system
- Triage tool is providing resources for applicants regardless of their eligibility.
- Intake interviews are faster for those who apply online

E. Test, Test, Test!

Testing cannot be undervalued especially in a complex system such as CLEAR*Online. The first steps involve checking all of the logic branches to make sure the applicant:

- proceeds down the correct path and receives an accurate eligibility determination,
- receives the correct messages throughout the interview,
- receives the correct directions regarding the next steps (who calls who);
- receives the correct resources, website links and referral information for their specific legal problem area; (This is especially important as one question may have 4 answers with each answer going down a different logic path resulting in a different outcome and different resources. For instance, an eviction may involve Section 8, a private landlord, a mobile home or farmworker housing, all of which involve different outcomes and resources.)
- All information has transferred correctly into Legal Server.

In order to achieve this level of testing, NJP developed and followed a test plan (attached) made up of 150 separate applicant scenarios. All testing results were immediately reported to the developers (PSTI) for correction in either A2J or Legal Server. Although time consuming, a proper testing plan will assure a successful product as we experienced with CLEAR*Online.

F. Notifying the community

On-line intake was launched at 5:00pm on Monday, Feb 13, 2012. As CLEAR does the screening for almost all of the civil legal aid providers in Washington, an email was sent to all NJP staff as well as the ATJ Leadership listserv which is comprised of the Access to Justice Board members, Washington State Bar Association members/ personnel active in ATJ issues, all of the Volunteer Lawyer Program coordinators and directors and all of the partners comprising the Washington State Alliance for Justice. All links lead to the CLEAR*Online page of NJP's public website (www.nwjustice.org) where the instructions, disclaimers, and "start CLEAR*Online Application" button are located. (Emails attached)

Other publication activities included:

1. Changed the CLEAR "closed" phone message to reflect the availability of the CLEAR*Online intake application 24/7
2. Adding the CLEAR*Online link to the WashingtonLawHelp "Find a Lawyer" channel and posting a "special bulletin" on the home page
3. Adding a "special announcement" to the "Get Legal Help" area on the nwjustice.org home page
4. CLEAR*Online announcement featured on the front page of EJC (Equal Justice Coalition) newsletter (attached)
5. CLEAR*Online email from the Legal Foundation of Washington (IOLTA/LawFund) sent to all IOLTA grantees (attached)
6. Email announcement sent on LsTech.
7. Special email sent to states who are interested in replicating this grant – Illinois, Idaho and New Hampshire
8. CLEAR*Online will be included on the backside of new WashingtonLawHelp bookmarks soon to be distributed to publicize the new LawHelp template and the online system. These bookmarks are given out at all presentations, community meetings and legal education trainings.
9. Notice will be sent to the Department of Human Services (WA State) to add this online link to all of their information that they are presently giving to low income persons on benefit programs especially on notices regarding the denial or interruption of benefits. Sadly, we missed the 2012 deadline for their agency guide but will be included in the 2013 edition.
10. Special Announcement: What's New on WashingtonLawHelp sent to over 2200 email addresses
11. Sister agencies have been advised to add this information to their websites wherever the CLEAR information is presented (see email)
12. CLEAR*Online information will be added to all printed material such as CLEAR cards and brochures as well as NJP office brochures prior to next printing

V. Factors affecting project accomplishments

The most important consideration in developing an online intake system is the time commitment. NJP decided to keep the development in house with a team of NJP staff and not hire an outside consultant. We had already developed the CLEAR intake system and Legal Server (in conjunction with PSTI) and were intimately familiar with both systems in a way that a consultant would not be. The team consisted of our network administrator, the Director of Administration, the Director of CLEAR, a CLEAR lawyer and at the end, a screener all of whom had their “real” jobs.

NJP was the first program to design the Legal Server integration so we hope it will be easier and less time consuming for those who replicate our grant. We attempted to replicate as closely as possible our standard intake procedure, including the financial screening with all of its various rules and scenarios, which contributed greatly to the complexity of the logic. Creating a simpler online intake system certainly would have been less time consuming, but we believe that the time and effort expended at the outset has contributed to the success of the project and resulted in time savings for screeners, staff, and clients in the long run.

A2J has some limitations that we were not completely aware of which necessitated our change in plans on certain questions and paths although our alternative decisions have been successful. NJP would preferred the entire system be programmed in Legal Server so NJP would have been able to fix some of the problems on our own instead of relying on the A2J programmer, however at the time of our development, this was not an option.

NJP specifically wrote a grant to develop a targeted system that we could handle with our current staff configuration and one that could become part of our already successful centralized intake hotline without being overwhelmed by hundreds of application requiring a reply.

CLEAR*Online is a successful project and can be expanded to other targeted priority areas in the future if funding for additional staff is available.

VI. Strategies to address major challenges

Developing this system took far more time than expected. The best piece of advice we can offer other programs wishing to replicate our system is to budget much more staff time to development and testing than you think you will need at the outset. We are however, extremely proud in what we designed, and in the user reviews we have received so far. After reviewing the survey comments, although applicants agree that CLEAR*Online is easy to use, it is obvious that many applicants, who do not have high priority problems, are disappointed that they still have to call CLEAR. We hope that the short instructive video will help make this message more clear.

Future steps will definitely be directed toward evaluating the usefulness of encouraging users with problems other than benefits and eviction (or other legal problem areas we are targeting) to complete the application online.

Assuming the system works as well as it is presently, we see the two most important upcoming challenges in sustaining the system will be:

1. Keeping the publications and website links that are presented to the applicants at the end of the interview up to date. The NJP webmaster has been trained on adding publications to Legal Server and will do so each time she adds a new or updated publication to WashingtonLawHelp. Additionally, she will schedule an annual check to make sure the website links are still active and correct.
2. Keeping the branch logic in line with the changing law and with our priorities if, for example, if one of the benefits programs loses funding.

VII. Major Lessons and Recommendations

Developing an online intake and triage system is a huge project and takes a huge amount of time. The logic branching for legal problem area and financial eligibility can be very complex.

- Once the technical areas were diagrammed, we underestimated the amount of time needed to draft the best “wording” for the interview questions and Help screens especially with regards to the financial screening.
- Testing- have a good plan and follow it. No short cuts.
- Schedule meetings for the year or two in advance so you can make sure to meet.
- Continue to check your User Survey for improvements and suggestions.
- Get your case management vendor involved from the beginning- they can be a wealth of good ideas!

NJP is very proud of our accomplishment and believe we have produced a solid system. We have the ability to add new targeted high priority areas in the future by following the branching template we developed for this project. We have spreadsheets and diagrams documenting all of the development and Legal Server integration fields which will be invaluable to programs who wish to enter into the world of online intake. We are happy to spend time with any program wanting help or information.

We would like to thank the Legal Service Corporation and the TIG staff for awarding NJP the funds to develop this system which affords low income people of Washington a new and different way to access our services.

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