TIG FINAL EVALUATION REPORT

Grantee name: Legal Aid of Southeastern PA
Submission date: January 2, 2014

TIG Grant Number: 12006
Approval date: March 9, 2015

Contact person: Nanci Hoover, Esquire
Email address: nhoover@lasp.org

Phone number: 484-322-6462

I. Project Goals and Objectives

The goal of this Telecommunications project, which was partially funded by a TIG grant, was to increase access to legal information and services for clients and other low income persons, including users of mobile devices, and improve the effectiveness and efficiency of the LASP Helpline by upgrading and integrating the program's phone, case management, and other technologies. Specifically, project's objectives were threefold:

1. Increase the efficiency of the Helpline staff as well as improving low-income persons' access to legal information and services by implementing upgrades to the LASP phone system, which would screen out individuals ineligible for LASP services, and then refer them to more appropriate resources;

2. Increase efficiency of the Helpline staff and improve LASP clients' access to information about their case by integrating and upgrading the phone and CMS functionalities so that clients can receive automated information about their case over the phone; and

3. Increase efficiency of the Helpline staff and improve LASP clients' access to information about their case by integrating and upgrading the phone and CMS functionalities so that clients can receive automated information about their case using mobile device text features.

II. Evaluation Data and Methodologies

In order to assess the success of the First Objective, the following evaluation data was gathered:

- Description of system requirements and capabilities in the Shoretel Project Plan;
- Data of 278 calls to the Helpline between November 6 and November 15, 2012 identifying whether a file was opened as a result of the call, and if not, why it was not opened;
- Data for 2 months prior to installation and 2 months post installation of # of calls answered by Helpline, and # of files opened;
- Description of training in use of new phone system, conducted March 5-6, 2014;
- Description of testing of new phone system and its component, along with the results and changes due to the testing; and
- Surveys of 57 Helpline callers in June of 2013 regarding their experience with the old Helpline phone system, and with 46 Helpline callers in November of 2014 regarding the new system.

In order to assess the success of the second objective, the following additional evaluation data was gathered (data gathered for the first objective has also been used for assessment purposes):

- Description of functionalities realized as a result of the CMS integration;
- Description of training and testing of new features integrating CMS and the phone system;
- Data regarding current clients' contacts with Helpline Advocates for March-November 2014
- Survey of all 5 Helpline Advocates regarding the use of the features.

In order to assess the success of the third objective, the following additional evaluation data was gathered (data gathered for the first and second objective has also been used for assessment purposes):

- Data for one month prior to the new phone system of number of Helpline cases closed due to client's failure to follow through by missing appointments or not following through;
- Data for July – December of 2014 regarding missed appointments (this is both pre and post texting feature being enabled);
- Description of the texting feature and its CMS integration;
- Description of the training to the staff in using the texting feature;
- Data regarding number of clients in the week of December 15, 2014 who agreed to allow the Helpline to text them (Opted in)
- Surveys of clients who have received texts in December of 2014;
- Surveys of Helpline Staff regarding the texting feature.

While selecting a new phone system that could help LASP meet its goal and objectives for this project, we learned that the products that we were considering do not yet have the capacity to include a texting feature. Therefore, it would be necessary to bifurcate the project, and find a way to implement texting independent of the design and installation of the telephone system. As a result, the strategies and evaluation data for the Third Objective (the texting feature) had to be modified somewhat, as we were no longer able to integrate the phone system and the CMS in order to provide the same automated responses to texts regarding their case status that we are now able to do by phone. Those activities and strategies relating to sending clients

scheduled texts regarding reminders of appointments that were scheduled, however, were unchanged by this development.

III. Summary of Major Accomplishments, Recommendations and Future Steps

LASP achieved its goals of increasing access to legal services and legal information, and increasing efficiency of Advocates who staff its regional Helpline. To reach its goals, LASP purchased and installed a new telephone/call center system, integrated this system with its case management (CMS) system, added features that increase access for cell phone users, and improved communication with clients by integrating the capacity to send clients text messages, with client permission. Initial data show increased efficiencies and access, with a 50% increase in the number of Helpline calls that are opened as LASP cases.

The new system includes a detailed call routing feature that allows callers to self-screen by indicating the type of problem they have. The automated attendant identifies some of the more common calls that LASP cannot assist with (those who want assistance with pending criminal charges, 'third party' calls and calls about issues outside of our service area). These callers get appropriate information when they follow the prompts, saving Helpline Advocate time to be spent with callers who LASP is able to help. Callers who do not follow those prompts are instead channeled into queues by type of problem, and can receive information while they wait, while the Advocate gets a screen pop telling them what queue the caller is in. The new system also has an IVR (Interactive Voice Response) feature that gives cell phone users the opportunity to avoid using minutes waiting on hold. They can leave a phone number and receive a call back without losing their place in the queue. Integration with LASP's CMS increases both Advocate efficiency and the quality of service. When an Advocate takes a call, the system provides information on any current and past cases involving the caller. This allows the Advocate to quickly access information that may be relevant to the caller's current situation, saving both parties time and lessening confusion. Integration with the CMS system allows current clients to avoid the Helpline queue altogether by using another IVR feature to access basic case status information over the telephone by entering their case number. This also saves Helpline Advocate time, which can be spent assisting other callers.

LASP created a texting system, separate and apart from the phone system, that is also integrated with our CMS. This allows Advocates to quickly schedule reminder texts to be automatically sent to clients three days prior to an appointment and again the day before. Advocates can also manually send texts reminding clients to provide information needed to further evaluate their case. This should both enhance the client's legal services experience and provide the Advocate with further efficiencies by fostering a more in depth understanding of the client's legal situation by both client and Advocate.

Research and experience show that texting is becoming a preferred method of communication for a large segment of the population across most demographic categories. Increased use of texts by Legal Services providers should improve communication between Advocate and client. Certainly, the integration of this feature with an organization's CMS is key to the usefulness of texting. Texting also has its limitations (the messages are limited by number of characters), and there may also be confidentiality concerns. We believe that additional investigation of how best to use this technology is warranted, and should be investigated in future TIG grants.

IV. In-Depth Analysis of Accomplishments

The overall goal of this project was to increase access to legal information and services for the Legal Aid of Southeastern Pennsylvania (LASP) Helpline callers, and to improve the efficiency and effectiveness of the Helpline staff. In order to accomplish these goals, we decided to upgrade and integrate the phone system, case management system, and other technologies.

In November of 2012, LASP entered into a contract with S.R. Green (SRG), for assistance in choosing a new phone system. Zahid Masood, of S. R. Green worked closely with LASP staff in preparing a Planning Assumptions document that contained our 'wish list' for a new phone system. This was then used as the basis for a Request for Quotation (RFQ) that was sent out to various telecommunications companies. After a process that included in-person presentations and site visits, we chose a Shoretel system that included the Enterprise Contact Center specifically for the Helpline. This product appealed to us because with it we would be able to design a call routing system for the Helpline that would be both detailed and flexible; we could integrate it with our case management system Kemp's Prime (Prime) to create a number of IVR (interactive voice response) features; a comprehensive reporting capability; and feature rich real time dashboard for the Advocates and a more detailed one for the Supervisor. A copy of the Shoretel Project Plan is included in the Appendices.

Unfortunately, Shoretel could not supply a method for texting clients, which we had initially hoped to be able to do under this project. LASP had to then find another means of achieving this goal. LASP contracted with LogiCurrent (LC) to help develop a texting system that would integrate with Prime so that we could send automated reminders via text to our clients.

Our first task was to finalize the plans for the Shoretel phones. Working with SRG, Relevante, and Transcend (the Shoretel vendor that was eventually replaced by Relevante), LASP then designed a system using the phone system's features and capabilities, that would eventually help to attain, along with the texting portion of the project, the goal and objectives of this project.

Objective 1. Increase the efficiency of the Helpline Staff as well as improving low-income persons' access to legal information and services by implementing upgrades to the LASP phone

system, which would screen out individuals ineligible for LASP services, and then refer them to more appropriate resources

Historically, only about 11-15% of the calls answered by the Helpline during its intake hours (9:00 am to 1:00 pm Monday through Friday) resulted in an open file. For example, as you can see in the chart below, the two full months prior to installation of the new phone system averaged only 13% of calls resulting in an open file.

	days in month	Calls Answered	Open Files	% Open
Dec-13	19 d	1339	158	12%
Jan-14	19 d	**1730**	**237**	**14%**
TOTALS		3069	395	13%

To help us understand why this was so, during a two week period in November of 2012, the Helpline Advocates recorded for each call taken during our intake hours whether a file was opened as a result of the call, and if not, why. 278 calls were recorded in this way (see Chart 1 in the Appendices). What we discovered was that 21% of the calls did not result in the opening of a file because they called about issues that we do not handle, such as support, asset divorces or probating an estate. 24% of the calls were about issues that we do handle, but we chose not to open a file because either there was no merit to the case or no legal issue, like, for example, the caller was about to be evicted, but they had no legal defense, and what they really needed was information about where to find housing. Some of the other reasons a file was not opened: they were already a current client and they were calling back for some reason (10% of the calls); they were over income (6%); it was a third party calling for someone else's legal problem (4%), or they thought that they were calling the Department of Public Welfare (DPW) (4%).

We decided to use the new phone system's capacity for detailed call routing to screen callers—something our previous phone system (ESI) was incapable of doing. In considering how to do this, we wanted to tread very carefully—we needed to avoid the trap of over screening and turning away people inappropriately. This meant that we needed to focus on types of calls that are clearly not within our bailiwick and can be easily identified. We immediately ruled out attempting to screen out those who are over income or a conflict, because the former has too many variables and the latter requires a person's judgment. Rather, we chose to design a call routing scheme that would screen out third parties who are calling on another adult's behalf, those who are calling about an issue that is outside our service area, and those who have been

charged with a crime and need a public defender. These callers would not go away empty handed, however: for those who follow the prompts for the former, they are directed to have the person call back directly, and for the latter, they are given the public defenders phone number in our four county area.

Another issue that we wanted to tackle involved those people who didn't get to talk with an Advocate. Typically 66% of the calls were answered under the old system. On our previous phone system, their only options were to listen to hold music or to hang up. This suggested the idea of using hold time to impart useful information: for instance, if someone followed the prompts for those with a custody issue, they could hear useful information such as the need to have the adverse party's address if they wish to file for custody. To confirm this, we asked 58 random callers to the Helpline in June of 2013, if they believed that they would benefit by hearing relevant information while they waited on queue, and 46 responded favorably. By implementing this type of system, then, we would be able to increase all of the callers' access to legal information. A copy of this survey is included in the appendices.

A call flow diagram was prepared by LASP and SRG with these goals in mind, and then along with Relevante staff, it was then converted into a form that would work on the Shoretel system. In the week prior to the March 7 go live date, each one of the Helpline staff tested the call flow by calling in and following the prompts, according to their assignment—i.e. one was told to be calling for a divorce in Chester County, another was calling in for an expungement, et cetera. A few support staff from other offices also were asked to do this. Based on these experiences, some changes were made: it was decided to increase the number of times callers were given the option to return to the previous menu, some of the language in a few of the messages needed to be tweaked, and an option for Spanish speakers to leave a message after hours was added. A copy of the final call flow , and the accompanying scripts are included in the appendices.

The Pew Research Center has done a number of studies that show that the use of cell phones is growing significantly in the United States, and that low income or non-English speakers are included in this growth. The most recent of these reports, from May of 2013, can be found at http://www.pewinternet.org/2013/09/16/cell-internet-use-2013/. In the same June of 2013 survey mentioned above, LASP did a satisfaction survey of random callers to the Helpline, and one of the questions asked if they were using a cell phone. Of the 59 people reached, 37 said yes, they were using a cell phone. Clearly, then, cell phone users make up a significant portion of the Helpline's users. One issue that arises from this fact concerns those cell phone callers who do not have an unlimited minutes plan. Many of low income people have these prepaid types of plans. Indeed, since 2005, the federal government through the Lifeline program, has made available discounts to qualifying low-income consumers on pre-paid wireless service

plans (see http://www.fcc.gov/lifeline for details on this program). For callers that have limited minutes, waiting on hold for an Advocate could be a costly endeavor. Fortunately, LASP's new phone system, Shoretel has a feature called 'Collect Callback' which responds to this potential problem by using the following steps: 1. Prompt the caller to enter the callback phone number, which is the destination for the call; 2. The IVR (interactive voice response) announces the callback confirmation; and 3. The IVR disconnects the call. The caller maintains their position in queue. When their position comes up in queue, the system reserves the agent and places the outbound call.

In order to prepare the staff for using the new phone system, a week prior to the Go Live date, Relevante sent out a notice to all LASP staff in the Norristown office regarding the new phones, and put the new phones on everyone's desk so that they could get used to them—the old phones were still working, this just gave people the choice of answering or making calls with either the new or the old. They circulated links to training videos on their website that anyone could check out. Mandatory training was scheduled for March 5 and March 6 for everyone, and copies of the User guides were put on everyone's desktop. On the actual Go-Live date, staff from Relevante were on site to answer any questions and address any problems that arose. The links to the user guides and video training are included in the Appendices.

Prior to the installation of the new phone system, we surveyed Helpline clients and found that 77% of the respondents were satisfied with the Helpline phone system. Post installation, that same question to random callers indicated that 91% were satisfied. Copies of the June Satisfaction 2013 Survey and the November 2014 survey can be found in the appendices.

In the first two full months using the new phone system, 20% of the calls answered resulted in a file being opened, as you can see from the chart below. This increase suggests that the call routing system is accomplishing what it was designed for: callers are being screened so it is now more likely that an Advocate will be talking to someone whom we can assist.

Month	No. of Days	Calls in + out	Files Opened	Files Opened
April	21 days	1299	262	20%
May	21 days	1284	262	20%
TOTALS		2583	524	20%

On the other hand, on average only about 11% of our callers choose the option for cell phone user, even though our post implementation survey indicated that we have more people using cell phones. Some of these people don't go into queue, but are sent to an Advocate

immediately, so they would not take this option. As for the others, after questioning some of our callers it appears that because they didn't know why cell phone users were being told to follow the prompts, they did not do so. The answer, then, is to clarify the automated messages.

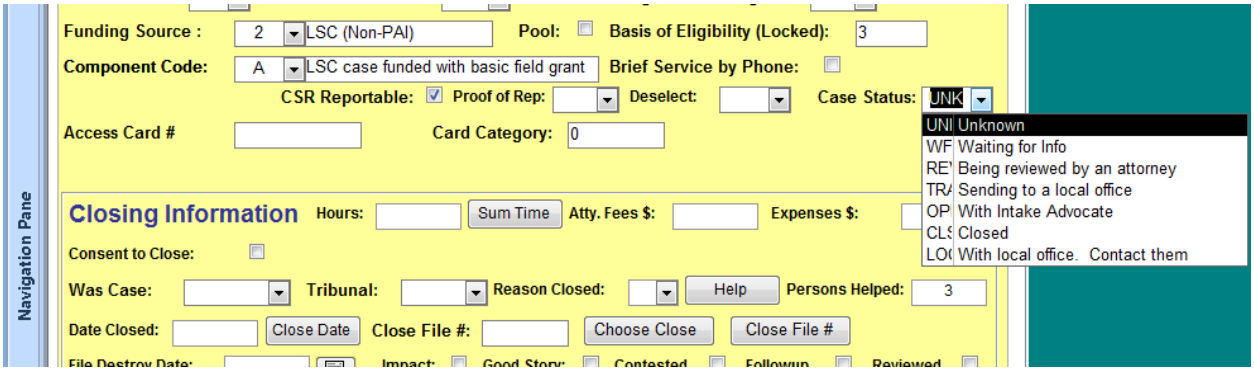
In fact, we do plan to update the call flow scripts, using some of the data and information that we have been able to gather so far. For instance, the local offices tell me that seniors in general don't like the system and get confused, hang up, and call the local office for help. Some callers have complained that the entire process is too long. While this cannot be completely avoided—screening does take some time--we can try to address this issue. One of the many attractions of the Shoretel system is that it is flexible: we can change these messages and the flows if we believe it is necessary, without incurring a large expense. Because this will be the first major change, Relevante staff will guide us through it, and then leave it to us to do any more changes ourselves.

Objective 2: Increase efficiency of the Helpline staff and improve LASP clients' access to information about their case by integrating and upgrading the phone and CMS functionalities so that clients can receive automated information about their case over the phone.

The new phone system would have two features directly tied to an integration with Prime. The first would be so that current clients could phone in and access information regarding the status of their case. The second would be so that the Advocates would get a screen pop when taking a call that gave them a list of all cases in Prime that have the same social security number as the person calling.

As mentioned above, LASP conducted a survey to identify the types of calls that do not result in an open file, and 10% of those calls were from current clients. We wanted to find a way to "divert" current clients, so that Advocates spend more time with callers who are applying for services during the time we are taking calls on the Helpline. One way is to allow current clients to leave messages—those who are applying for services are not given an opportunity to leave a message, as we discovered years ago that trying to keep up with call backs is not an effective way of running our Helpline. Too much time is lost in playing phone tag. Another way is to give current clients the ability to call in and be told the status of their case through an automated IVR system.

Relevante worked with LASP and James Spencer of Kemp's Caseworks to integrate the two systems to make this happen. A field had to be added to a table in the Prime database, and then LASP's Intake page 3 had to be modified (as shown below) to add a drop down menu for this.



This field would be accessed by a Shoretel application so that the information would be conveyed to the client. The client will have to enter a correct case number and the last four digits of their social security number in order to get the status update. To view the script that is used here, see the Call Flow scripts mentioned above. It is similar to the cell phone option in that an IVR system will ask the caller to input their case number, and then will repeat it back to the caller to confirm. If the caller presses the prompt indicating that this is the wrong number, they then are able to re-enter the number. The same process is then repeated when the caller is asked to input the last four digits of their social security number. This feature went live on April 4, 2014. In May of 2014, this self-service option was accessed 132 times.

The new phone system has given us the opportunity to assign a "wrap" code to each call answered by an Advocate. We use this to identify if the call resulted in an open file, or if not, why it did not. An example of the results of using these wrap codes is below. One of the wrap codes is for current clients, so we are able to see approximately how many times our clients do not use the self-service option, but instead opt to wait in the queue to talk to and Advocate. During May through November of 2014 only 8% of the calls that were answered by an Advocate were from current clients.

	May	June	July	August	September	October	November	December	TTL
Open File	151	148	168	109	162	152	116		1126
Conflict	18	25	16	13	18	22	14		141
Ineligible	69	56	76	32	91	66	39		480
Do Not Handle	182	170	211	148	229	206	132		1391
No Legal Issue	50	29	55	43	81	61	42		412
Uncooperative	7	22	16	16	27	13	10		129

Other	178	112	159	78	107	84	86		917
Current Client	39	119	38	43	70	35	52		407
Total:	694	681	739	482	785	639	491		5003

Current clients, then are given a quick way to find out information regarding their case, which should improve their experience with LASP, removing the need for them to go through the call routing and waiting in a queue for the next available person. Advocates are now spending more time with callers that do not already have an open file, which makes them more efficient.

But we believe that this can be improved. One of the factors that probably makes this under-used is the case number. Many, if not most of our clients do not know or remember their case number. In the near future, we plan on adding an option to our texting feature that will allow us to text clients their case number. We are hoping that this will increase the use of the self-service option.

The other feature that is the result of an integration with Prime is the screen pop. This was not added until May of 2014. Callers are asked to input their social security numbers (these numbers are not recorded in any of the Shoretel reports, so that it can remain confidential, should we not open a file for the caller). When they do so, the Shoretel application accesses our CMS and then shows the Advocate answering the call a Prime search screen with a list of all cases found in our database where a client has this social security number. A diagram of this integration can be found in the appendices. This allows the Advocate to have immediate access to previous (or current) files of the caller. Each of our Helpline Advocates have said that they have found this screen pop to be very helpful (it was voted most popular new feature in an informal poll). They can immediately see if this person already has an open file, and can then access it directly from the search screen to familiarize themselves with the situation. It will also show if this is a caller who has numerous past cases, all on the same issue. This can be useful for the Advocate to know: for instance, if the notes in the other cases reveal that the client has had persistent and on-going problems with their landlord, the Advocate will know that telling the caller to talk to the landlord to see if this matter can be resolved is highly unlikely to work. Perhaps the most useful instance for this feature is when the person calling is using a different name than they did in a prior case. Perhaps they now have a married name, or they retook their maiden name. Many times the callers themselves don't advise us if they have used a different name before, but this screen pop will tell us instantly if this is so, if they have a prior history with LASP.

Each of these features were first added to the Supervisor's workstation, so that they could be tested. We used dummy files to check to see if the self-service option was correctly informing

the callers of the status of their case. One of the first changes we made was to tell the caller that their case number is nine digits and begins with the number 15, to make it easier for them to find the case number. Also, we initially did not limit the times that they could try to input their case number if they kept getting it wrong. We then decided to only give them three chances, and then we would send them to a voice mail box to leave a message. After a few other minor tweaks, we added the prompts in our call routing flow to guide current clients to this self-service option on April 4, 2014. The paralegals had already been instructed to start updating the status field each time that they go into a casefile by memo dated April 1, 2014 so that the clients using this feature would get something other than "status unknown".

For the screen pop feature, although it took longer to add the code to make it happen, there were no changes that needed to be made once it was added to the Supervisor's workstation. We tested how the screen pop would work when Prime wasn't open already, when it was open in a case file, when it was open while someone was putting in time, and when it minimized. The screen pop does not work when Prime isn't already open, but it does is all of the other situations. Prime will open the search screen on top of what is already open, so that when the Advocate is done with that call, they can close the search screen that popped up and find exactly what they had open in Prime prior to the screen pop. This feature was enabled on May 1, 2014.

Again, the Advocates have found this latter feature to be very useful, and they feel that they can get up to speed on the caller's situation much faster when they are immediately presented with the caller's 'case history' with LASP. This efficiency saves both the Advocate and the caller time, and gives the caller an improved experience.

Objective 3: Increase efficiency of the Helpline staff and improve LASP clients' access to information about their case by integrating and upgrading the phone and CMS functionalities so that clients can receive automated information about their case using mobile device text features

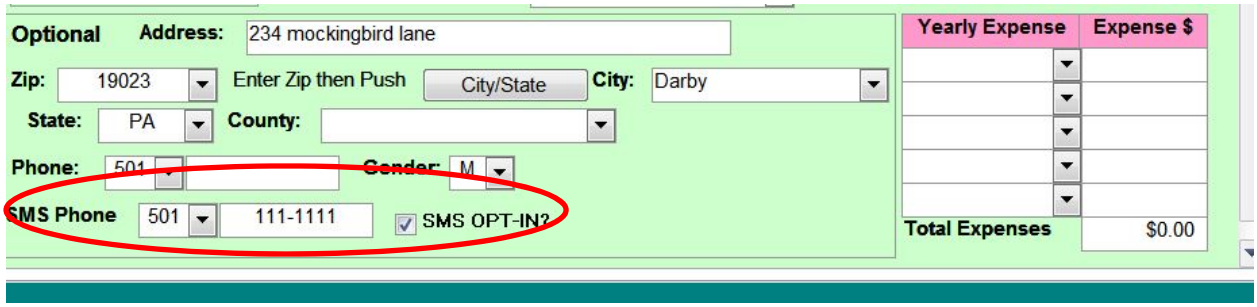
The same Pew study that was mentioned above also told us that more and more people use texting to communicate with others. In another survey that we conducted in June of 2013, we asked Helpline callers if they used texting. 32 of 48 people answered yes. This demonstrates that our clients are following this trend as well. A copy of this survey is included in the Appendices.

We have already mentioned that we were unable to find a way to add a texting feature through our new phone system. As related in our Milestone report of April 30, 2014, after researching various methods that were available, we decided to use a product called Twilio, which would allow us to programmatically send and receive SMS (Short Message Service, otherwise known

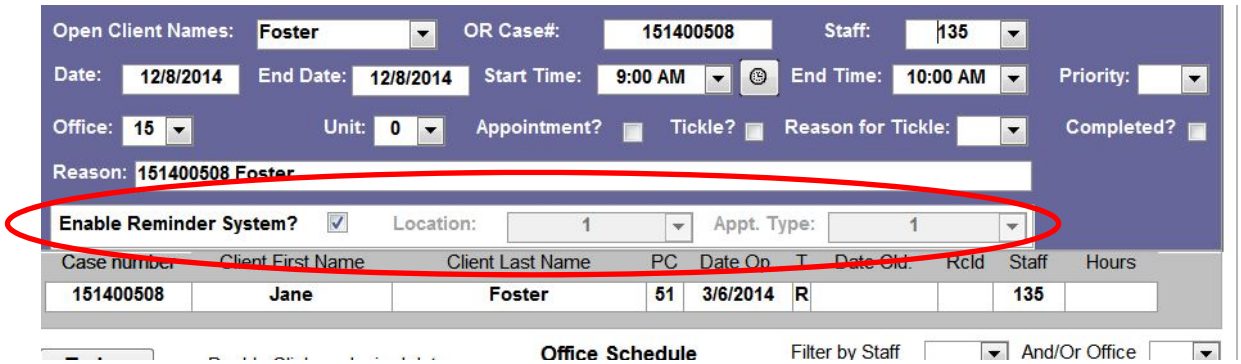
as texts). In order to do this, however, we would need to develop a web application that would integrate with Prime, as well as interface with Twilio. Twilio itself has a 'Developer Network', where you can post your project requirements and developers will respond. LASP talked to a few different developers through this forum, but none of them seemed suited to our special needs. We were then directed to a company called LogiCurrent(LC), which had worked with both Prime and Twilio before. Legal Aid of Northern Virginia were currently using LC to develop a texting program as well. We entered into a contract with them in early January 2014, for them to develop a system whereby LASP would be able to send texts generated in Prime through Twilio. A diagram of the proposed system is included in the Appendices.

Initially we wanted to have two separate uses for the texting system. We wanted to be able to send reminders to clients regarding appointments scheduled, or about information that we needed to receive from them. This has been used successfully in the Health Care field—for a comprehensive discussion of the use of text messaging in the Health Care Industry, see the U.S. Health and Human Services May 2014 report found here: http://www.hrsa.gov/healthit/txt4tots/environmentalscan.pdf. We also wanted to provide a parallel opportunity for current clients to receive automated case status information—we had provided this through our phone system, but we also planned on allowing access to this information via text messaging.

LASP and LC came up with a plan for how the text messaging reminders would work. First, Advocates would have to ask each client if they would accept text messages from us. If we obtained their consent, this would be noted in the Prime file (at the bottom of the Eligibility page), along with the specific phone number to use.

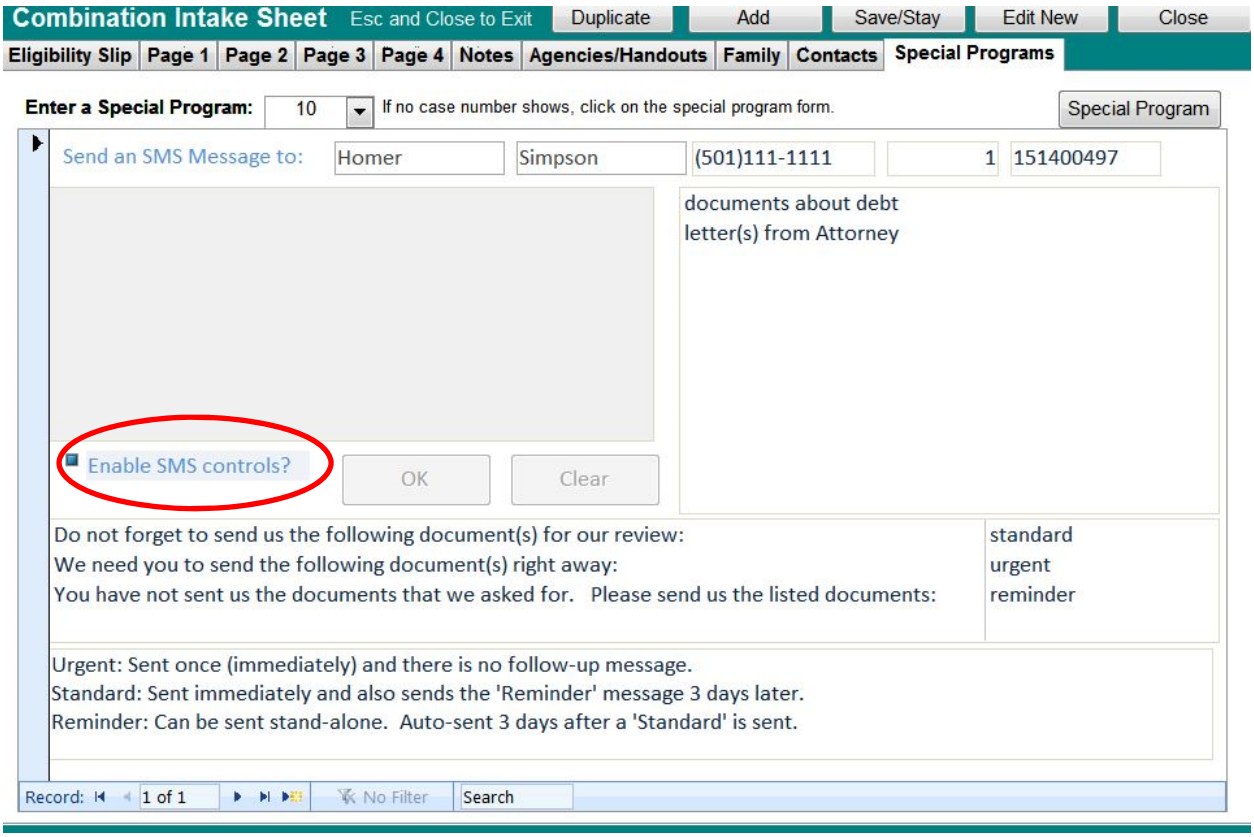


If the particular client was signed up to attend a custody clinic, then that information would be added to the calendar by the Helpline staff (which can be accessed on the Eligibility Page). The Calendar form was modified specifically for this use.



As long as the Opt in box was checked on the eligibility page, just by filling out this calendar entry, an automated text would be sent out a text 3 days prior to the appointment date, and again one day prior to the appointment date. An example of a text that would be sent out: "From Legal Aid: Please don't forget that you have an appointment tomorrow, 12/18/14 for Legal Aid's Chester County custody clinic at 8:45. Call 610 436 4510 if you can't come." LC created a web application that functions as an SMS scheduler—it captures the data from Prime, and then following its schedule, it send the texts to Twilio to be sent out.

In addition, we created a way to 'manually' create and send texts for reminders that did not involve appointment dates. This was accessed through the Special Programs Tab in a Prime file—Special Program 10. A screen shot of a dummy file is shown below.



The Advocate would go to this page, check the “enable SMS” box and then compose the text. There is an automatically generated list of likely documents that we might need to see on the right hand side of the screen, based on the PCode of the file. There is also canned text that can be used at the bottom of the page. Or, the Advocate can type in any message that is appropriate. An example of a text that could be sent out: “From Legal Aid, case number: 151400497. Do not forget to send us the following document(s) for our review: letter(s) from Attorney” Every text will start off the same—it was say it is from Legal Aid (the limit on characters made it impractical to put our whole name in, and the acronym LASP might not be familiar to our clients) and then give the case number. The Advocate can choose to send a standard message (which means that the text will go out immediately, and then another reminder three days later), which starts out “do not forget to send us the following documents for our review:”, and then added one of the documents that was automatically listed “Letters from Attorney”. Any portion of the text (other than the beginning phrase and case number) can be modified by the Advocate, so that it could read ‘Do not forget to send us the following document: the letter from Attorney Joe Smith’ or ‘the letter dated 6/4/14 from the creditor’s attorney”. At this time, we cannot go over the mandatory limit of 147 characters (the system won’t let you do so), but in the next week, that will change so that if someone were to send out a text that is longer, then it will be split into two parts, with each part identifying that it is not one complete text (i.e. this is page one of two, this is page two of two).

A log of the texts sent can be found again on the Special Programs tab, Program 11 of the relevant case, as you can see below (this is a dummy file, hence the garbled content).

Enter a Special Program: 11 If no case number shows, click on the special program form. Special Program

Appointment Reminder System CASENUM: 151400497

Type:	SMS message	Date Sent:	12/28/2014 11:25:00 PM	☑ Send reminder?	
Phone:	(501)425-6391	Sent By:	135	Type:	standard
Status:	sent	Direction:	outbound	Reminder?	12/31/2014
Message:	From Legal Aid, case number: 151400497. lkjhgfd documents about debt;				

Type:	SMS message	Date Sent:	12/28/2014 11:16:00 PM	☑ Send reminder?	
Phone:	(501)425-6391	Sent By:	135	Type:	standard
Status:	sent	Direction:	outbound	Reminder?	12/31/2014
Message:	From Legal Aid, case number: 151400497. Do not forget to send us the following document(s) for our review: letter(s) from Attorney;				

Record: 1 of 137 No Filter Search

Record: 1 of 1 No Filter Search

It includes the actual content of the text, and the date and time that it went. Even those texts that are sent through the calendar are recorded in this log.

Unfortunately, as noted above, this project faced a number of difficulties, and has only really been fully operational for less than a month. The LC developer, Stewart Whaley, would, at times, be unresponsive, due to personal difficulties such as an illness. His work on Prime was overwritten multiple times due to problems with our terminal server, which for unknown reasons kept reverting to earlier versions. Because Relevante and LC were both working on separate copies of the back end of Prime, LC then had to rewrite their changes onto the Relevante copy to avoid having more than one version of Prime. And perhaps the most serious problem involved issues with our server migration which negatively impacted LC's ability to access Prime and our network for significant periods of time—we experienced intermittent difficulties with this from September through November. We did have the ability to do manual texting for a short period of time in October and November, but we had problems with the SMS log--we were not getting any record that a text had been sent. So we stopped using that feature until all of the other problems were fixed. Finally, we were able to use the scheduler on December 16, 2014. However, this means that prior to this report, we only had the opportunity to use it for two custody clinics, one on December 18 and one on December 19.

Because of these problems, we decided not to add the ability for a client to text in and check their status, as they could do via phone. Firstly, our clients already had a viable option for

getting this information (phone), and secondly there were a number of issues that would need to be addressed. If we allowed inbound texting, we would need a way to match up texts with the appropriate file, because we could receive texts from anyone, and not just a current client checking on their status (right now anyone texting us is advised automatically by return text that we do not check this account). For security purposes, we ask those who phone in to provide the case number and the last 4 digits of their social security number. How would we be able to do this with texts? For now, these and other questions will remain unanswered, but perhaps might be addressed in future TIG grants.

Early on, our Advocates were instructed to start asking clients if we could have permission to text them, and then we would record it on the eligibility page. A demo of this was sent out to the Advocates using Turbo Demo software. The Advocates learned how to do manual texting by watching the Supervisor send one out, and then by having the Supervisor watch them do it. For the scheduled texting, the supervisor sent out another demo using Turbo Demo, that went over how to enter the information on the calendar in Prime. A pdf copy of the slides for both of these demonstrations is included in the appendices.

For the clinic scheduled on December 18, we had four participants who had agreed to allow us to text them. We sent out texts to each, and at the clinic we asked if they found them helpful. All four did come to the clinic, and all four said that they found the texts helpful. For the clinic scheduled on December 19, we only had one participate who had agreed to allow us to text. Although this person did not show up to the clinic, she did call in that morning to reschedule, so the reminder did work, even if it didn't result in them attending the clinic.

For the custody clinics scheduled between July and December of 2014 in Delaware County, on average 52% of those invited showed up. For that same time period in Chester County, for the filing class 48% of showed up. A copy of this survey can be found in the appendices. In the month prior to implementation, approximately 32% of the Helpline cases opened that month (January 2014) were closed due to the client's failure to follow through. Can texting improve this average? Obviously we can't really use the small amount of data that we have in using the texting feature to conclude that the texting reminders are working. (If we could, then we have 100% success!). We will continue to use the texting, and examine the data as we gather it to determine if it is working as desired. We do believe that in the end, the attendance will improve, as it has done in the Health care field, and this will certainly improve the client experience and increase the efficiency of the LASP Helpline.

V. Factors affecting project accomplishments

This project did present a few significant challenges. The primary difficulties were posed by technology.

1. Choosing a phone system is no longer a matter of picking the design of a phone and plugging it in. LASP had to consider such issues as VOIP vs PSTN (internet or landline) and on-premises hosting or cloud. Terms such as IVR, packet loss, ANI, hunt groups, MAC, unified communications and voice switches are used frequently in the literature supplied by the phone system vendors. **The challenge was to find a way to make intelligent decisions in the specialized world of telecommunications, which has technology that is rapidly changing.**

2. Although it seems likely that soon it will be routine for new business telephone systems to provide a way to send and receive texts, it has not yet reached that point. None of the companies that submitted quotes could offer us this service. **The challenge, then, was to find a way to implement a texting capability for our Helpline staff.**

3. The telephone system LASP selected was a Shoretel product, and the local vendor that would design and install it was to be Transcend United Technologies (Transcend).We entered into a contract with them in January of 2013. Unfortunately, a few months later Transcend was acquired by a large, multi-national company, AGC. Almost immediately, the level of service that we received from Transcend was greatly diminished—meetings were postponed, phone calls were not returned, and the project went nowhere. By the summer, LASP realized that we had a serious problem. **The challenge was to find a way to move the project forward, given AGC's lack of responsiveness.**

4. As is true for all organizations in this day and age, LASP has multiple applications running on its servers, and many programs in use throughout the organization. This project envisioned integrating the phone system with at least one of those applications, Kemp's Prime. In addition, when we discovered that we had to use something other than the phone system to set up the texting, we had another system that needed to be integrated with Prime. Compatibility with other applications, with the servers, with different versions of software can all be an issue when adding or integrating an application. To put it bluntly, sometimes applications or programs do not play well together. We experienced multiple problems in this regard, which were exacerbated by LASP's lack of in-house technology expertise.

For instance, the Shoretel contact center application went through an upgrade that made it incompatible with Windows XP, which was still on some of the Helpline staff workstations. We went through a server migration that had a tremendous impact across the organization because of issues with network access and PRIME availability. LASP has contracted with an outside company, Tech Impact, to provide a variety of computer and technology related services for many years. However, during this project we realized that this outside contractor was not adequately familiar with LASP's entire technological situation and could not foresee, minimize, or quickly address the problems that we were experiencing. In some cases, their unfamiliarity itself exacerbated the problems. This was particularly the case with regard to the

server migration, which they carried out to improve data security, but which was done with inadequate consideration of the impact upon the Shoretel and LC work. The server migration caused loss of project work, negatively impacted network access and access to Prime, and repeatedly interfered with proper functioning of the texting system. In fact, every issue we had that involved the LASP servers, or the LASP version of Kemp's, or any other LASP software turned into a serious setback. The number of hours that were wasted in the texting project alone was estimated by LC to be over 100. **The challenge here was to be able to ensure that this project would not be negatively affected by, or conversely would not negatively affect, the other LASP applications, programs, and infrastructure.**

Time was a factor in each of these challenges. From vendors that lost interest in the project, to consultants that lost months of work due to issues with terminal servers, there were numerous instances where we were concerned with meeting our scheduled milestones.

VI. Strategies to address major challenges

LASP encountered challenges as discussed in section V. However, the effect of at least some of the 'difficulties' was greatly minimized by our early decision to hire a consultant. This strategy turned out to be very beneficial. Shortly after LASP was informed that our application for a TIG grant was accepted, we contacted S.R. Green & Associates, a consultant that had come highly recommended by others in the LSC world. LASP entered into a contract with them, whereby they would assist in the planning and implementation of this project. Zahid Masood of S.R. Green worked closely with us to develop planning assumptions, prepare specifications, and evaluate the vendor responses to our RFQ. A challenge to any organization with only a basic familiarity with telephone systems is to understand the vocabulary, the process, and the technology well enough so that intelligent decisions can be made. Our consultant certainly made this possible for LASP, and our satisfaction with the selected product is a testament to the success of this decision.

Challenges arose again during the design phase, when the local vendor, Transcend, was purchased by a large company. The new team did not complete the design work, repeatedly missed meetings and did not return phone calls or emails. However, the advice provided by Mr. Masood again safeguarded the project. After we had chosen the Shoretel product, Mr. Masood had advised us to enter into two separate contracts with Transcend, one for the design phase, and one for the equipment and installation. At the time of the AGC acquisition of Transcend, we had not yet contracted with them for the equipment and installation—we were still in the design phase. So, we were relatively free to search for another vendor that could install and implement the Shoretel system that we had chosen. We contacted Shoretel to recommend another vendor, and they directed us to Relevante, which had coincidentally recently hired many former Transcend employees who were already familiar with our project.

The initial purpose of dividing the contract into two separate parts was to have the system designed first, so we would know exactly what equipment would be needed to implement the design before we contracted to buy the equipment. However, this also freed us to change vendors with no additional cost to the project. Our initial design contract was for less than $5000, and much of the work that Transcend had done for us already was used by Relevante to complete the design, which they did with no further charge to us. We contracted with Relevante for the installation and purchase of the system, which they completed with great dispatch: the contract was signed in January of 2014, and the phone system went live on March 7, 2014. Transcend's failure had little impact on the ultimate success of the project, thanks to our consultant.

The texting portion of the project presented a host of difficulties. Initially, we learned that we could not provide texting services through our phone system, and thus we would have to find another way. After some investigation, it was decided to use Twilio for the texting, and to have a web application that would be integrated with our CMS and designed by LC. This company was recommended by another legal services program, who were using them for their TIG grant. In order to have automated texts generated from Kemp's Prime, Stewart Whaley of LC had to create a web application that was basically a scheduled SMS program that would sit on one of our servers. This web application would interact with Kemp's, in order to find out what to text and who to text, and then interact with Twilio, an API (application program interface) at the appropriate scheduled time. Twilio would actually send out the texts. Receiving texts posed an additional problem, as incoming texts had to somehow be matched to the correct file in Prime, if we wished people to be able to obtain information about their case, as they could do by calling in to our phone system. For the phone IVR feature, the caller would have to enter their case number and the last four digits of their social security number to access the status of their case. We had made the decision to require both forms of identification for security reasons, but to try to replicate this in our texting program was not easy to do. Because of the time lost due to the server difficulties, we never were able to devise a cost-effective solution to this. However, as our clients can still obtain this information by phoning, we deemed this disappointing, but not critical to the overall success of our project.

As discussed in Section V, the complexities involved in installing the texting system challenged LASP's in-house technical capacity. The company that we contracted with to manage technology for us was not as able to assist as we had hoped, and in fact exacerbated the problems when they carried out a server migration.

Motivated in a great part these experiences, LASP hired a Technical Director in mid-September, 2014. He has significant experience with technology and has worked in non-profit agencies. He has already spent much of his time here working to resolve the server issues referenced above.

He was involved in completion of the texting project, and worked with LC to ensure that the texting capacity was up and running in December. Clearly in this day and age, any new technology that is added must take into consideration its effect on the technology that is already there, or the consequences can be disastrous. If an organization wants to take advantage of the many exciting developments in technology today, institutional knowledge is a must, whether it be in house or outsourced. Our experience indicates that when an organization reaches a higher level of technological complexity, in-house expertise may be preferable. We believe that the LASP organization has taken a significant step forward with this new hire, and that as a result, we will be able to find new ways to better serve our clients and support our staff.

Throughout the project, time was a tremendous challenge. We discovered no magic solution to this problem – monitoring timelines, remaining in contact with vendors, analyzing progress and making changes and adaptations as necessary, and working with our Grant Manager David Bonebrake allowed us to complete the project within the timeframe in spite of significant challenges.

VII. Major lessons and recommendations

The number one lesson we learned is that it is important to understand your technological capabilities and limitations before starting a project like this. Whether the solution is to hire outside help, or hire in house to address the deficiencies within your organization, those decisions should be made early on in the process to avoid complications that could negatively impact your project.

Don't forget how your organization actually works, and make sure your consultants, vendors and developers know it as well. Work closely with them to make sure you get what you need, and not what they want you to have.

When designing a call routing system, make sure to close all of the unending loops in the messages—in other words, no one should be able to call your toll free number and stay there for an indefinite period of time. There is a scam known as Toll Free Traffic Pumping which can result in your being charged for some very long (over 100 hours) phone calls.

For any automated screening tool, make sure it isn't so rigid that it can't make allowances for those odd situations that can crop up that don't easily fit into any pre-selected categories. For our screening tool, we have ensured that someone who has no idea what 'queue' they should be in can still speak with an Advocate.

Texting is the wave of the future, and legal aid organizations should continue to search for innovative ways to use this to better serve our clients.

CHART 1

OBJECTIVE 1 Types of Calls

	OPEN	OVER INCOME	CONFLICT	CRIMINAL	THIRD PARTY	IMMIGRATION STATUS	INCARCERATED	UNCOOPERATIVE	CURRENT CLIENT	CHOSE NOT TO OPEN - LL/T	CHOSE NOT TO OPEN - CUSTODY	DO NOT HANDLE	Contact DPW	CHOSE NOT TO OPEN - BANKRPUTCY	CHOSE NOT TO OPEN - WELFARE	REFER TO ANOTHER (local office, spanish speaker)	CHOSE NOT TO OPEN - CONSUMER	CHOSE NOT TO OPEN - SS	CHOSE NOT TO OPEN - FORECLOSURE	EXPUNGMENT	CHOSE NOT TO OPEN UC	CHOSE NOT TO OPEN - DIVORCE	
RB	2	3							2	2	5	3											
VM	2	2							2			2	1	1	1	1							
VM	1								2			2	1		1								
VM	5		1						2	2		3	1		1			1					
EG	4		1			1		1		2													
EG	1	1		1	3					2								1	1				
RK	3	1							1														
RK	1	3	1									1	1			1							
VM	4	1		1	1				1	3		9	2	1			1						
RB	6		2					1	3	2		1			1								
RB	4		1	1	2					1		3		1	3	1							
CH		2	1							2	1	3			2				1	1			
DB	3		1					1	3		1	1			1						1		
DB	3				1				1	1		7	1		1								
CH	2											2		2	2								
RK	3			1					2			4		1	1								
EG	2	1	1	2	1					2		4											
EG	1			2						1		3			2			1	1				
VM		1	1	2	2				4	1		4	1				1				1		
CH		1			1				1	1		3			1	1							
VM	3			1	1				1	1		2	1			2	1					1	
VM	3	2							3			1	1			1	1						
TTL	**53**	**18**	**10**	**11**	**12**	**1**	**0**	**3**	**28**	**23**	**7**	**58**	**10**	**6**	**17**	**7**	**4**	**3**	**3**	**1**	**2**	**1**	**278**
	19%	6%	4%	4%	4%	0%	0%	1%	10%	8%	3%	21%	4%	2%	6%	3%	1%	1%	1%	0%	1%	0%	

2013 HELPLINE SATISFACTION SURVEY

Recently, you contacted the Advice and Referral Helpline of Legal Aid of Southeastern PA (LASP) for a legal issue. We are in the process of upgrading our phone system, so I'd like to ask you some general questions

1 When you first called, did you have trouble in getting through to talk to someone?

YES	19	32%
NO	40	68%
	59	

2 Did you use a cell phone to call us?

YES	37	63%
NO	22	37%
	59	

3 If yes, did this effect how long you waited on the phone to speak with someone?

YES	0
NO	51

4 Right now, you can only hold on our Helpline for a limited period of time, while waiting to first speak with an Advocate. Would you have been willing to hold for a longer period of time?

YES	38	66%
NO	20	34%
	58	

5 Once you did talk with someone, was it clear what the next step in the process would be?

YES	43	74%
NO	15	26%
	58	

6 Would you benefit from hearing about the information you will need to have ready for the Advocate while you wait on the queue?

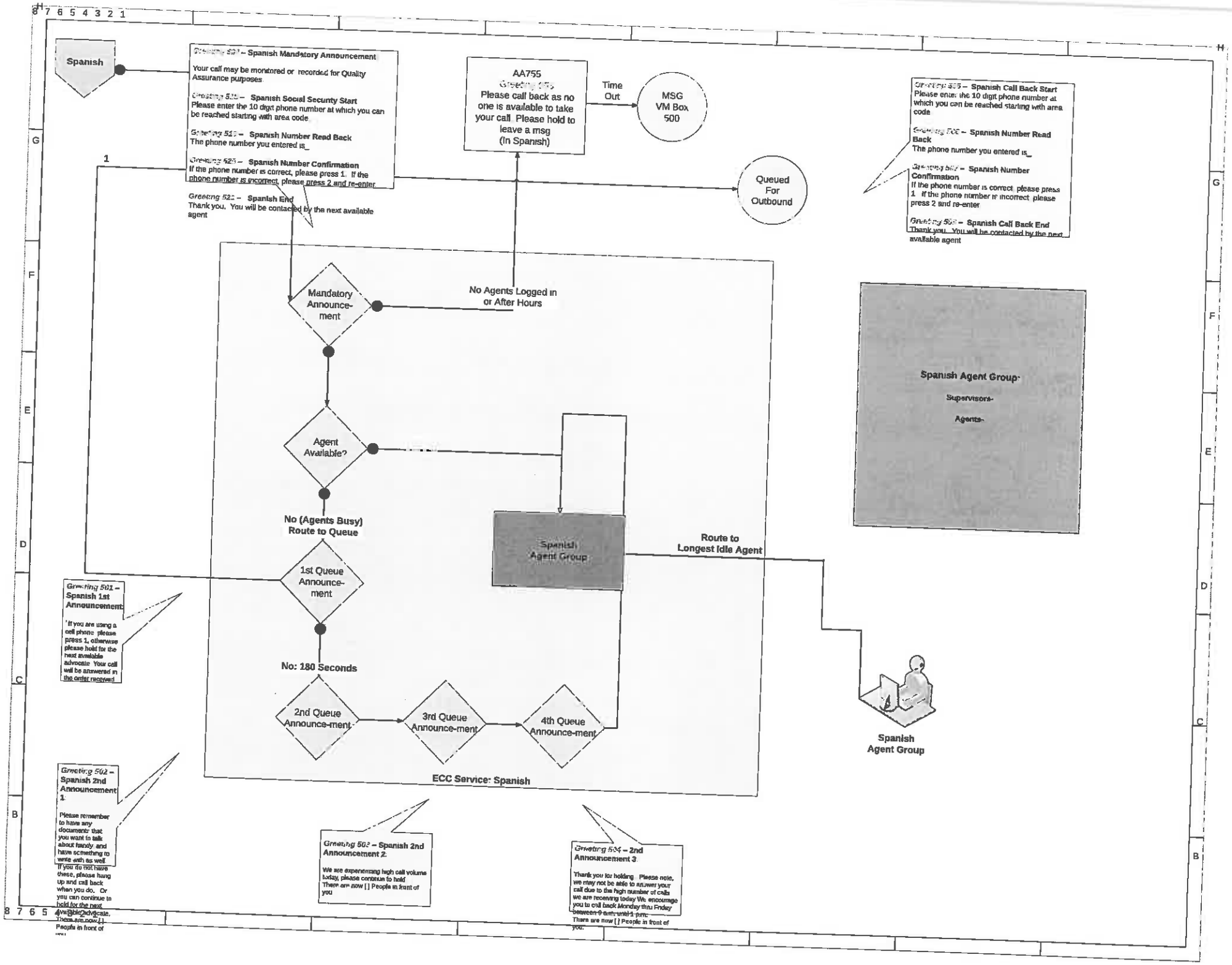
YES	46	79%
NO	12	21%
	58	

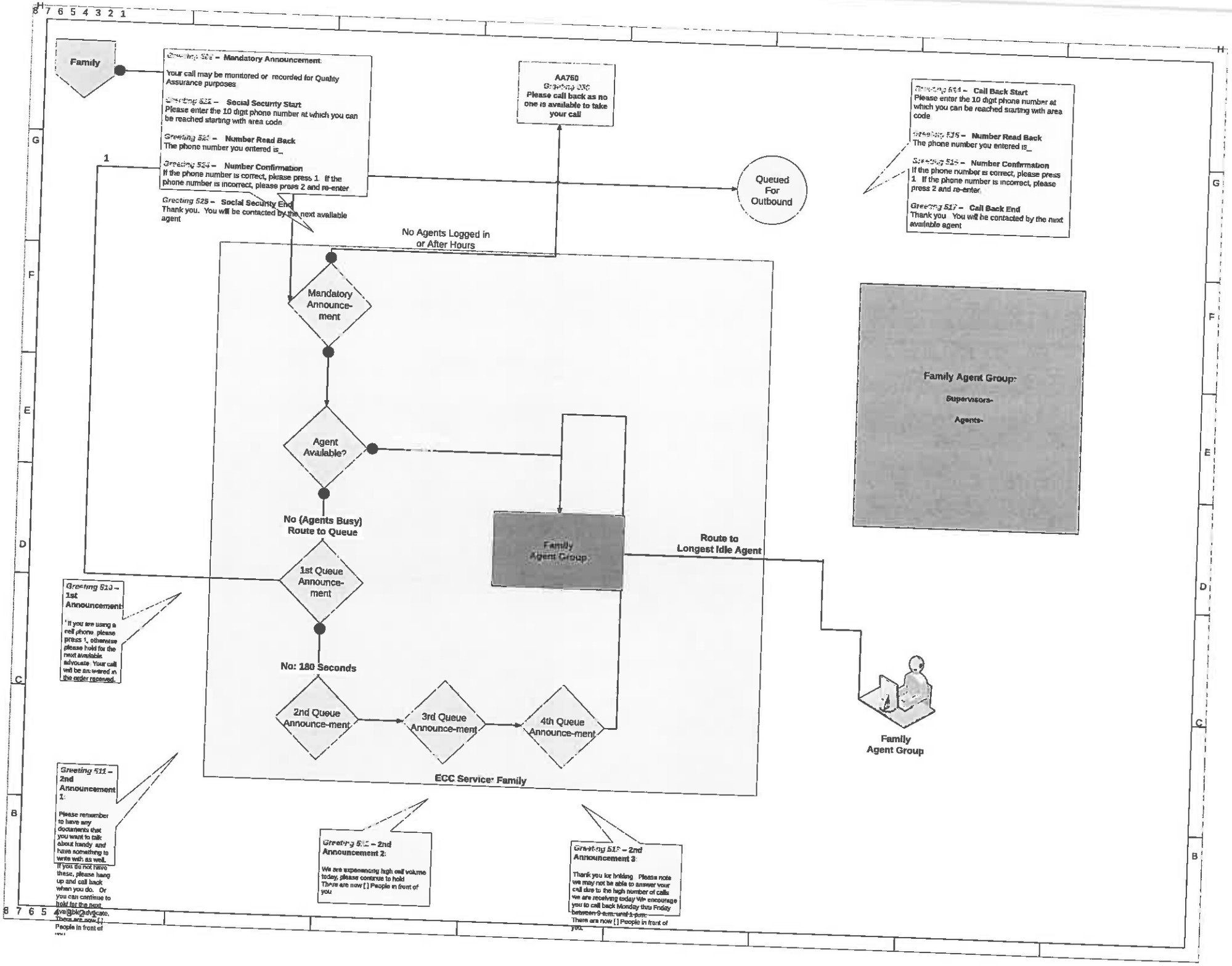
7 Were you satisfied with our Helpline Phone system?

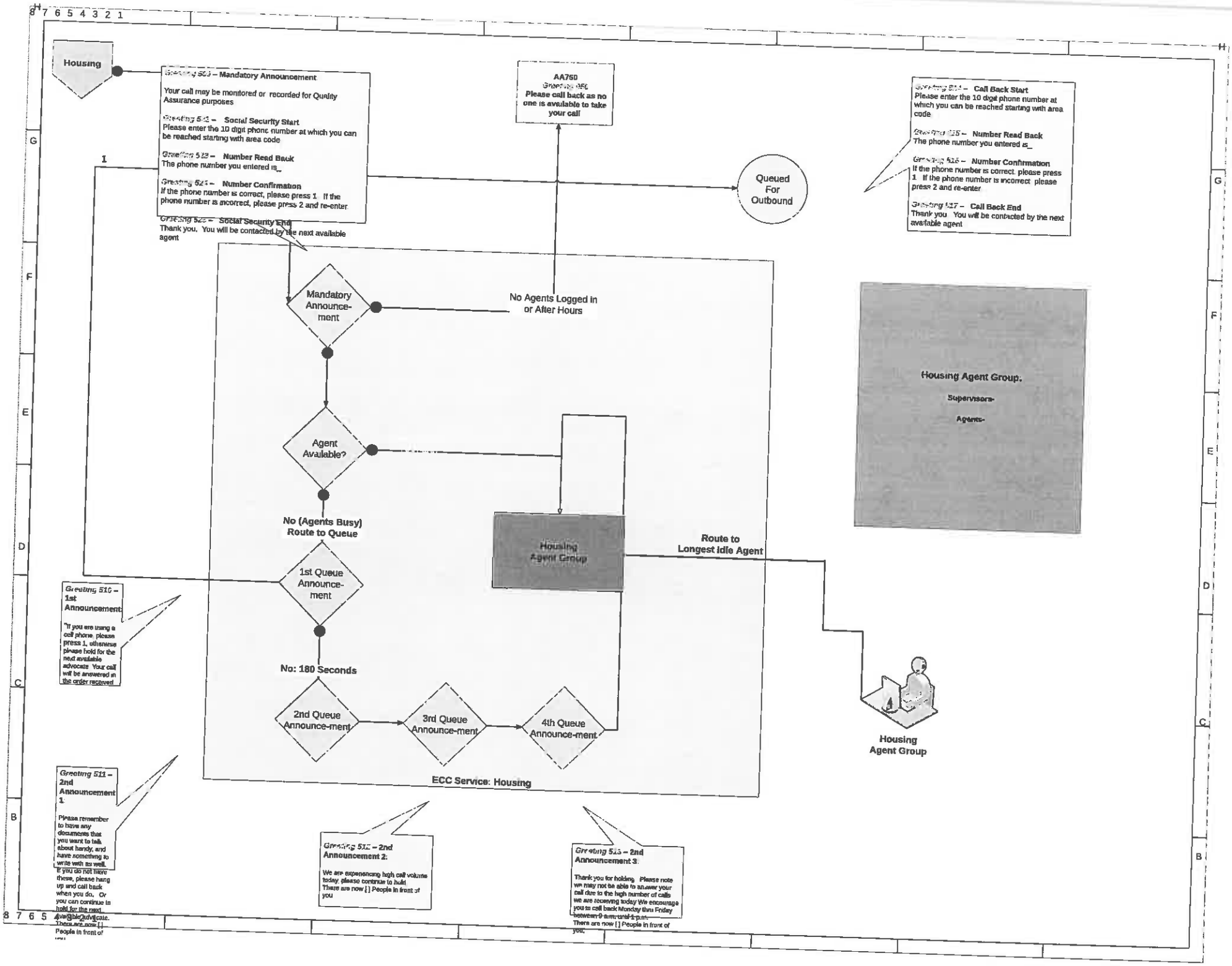
YES	44	77%
NO	13	23%
	57	

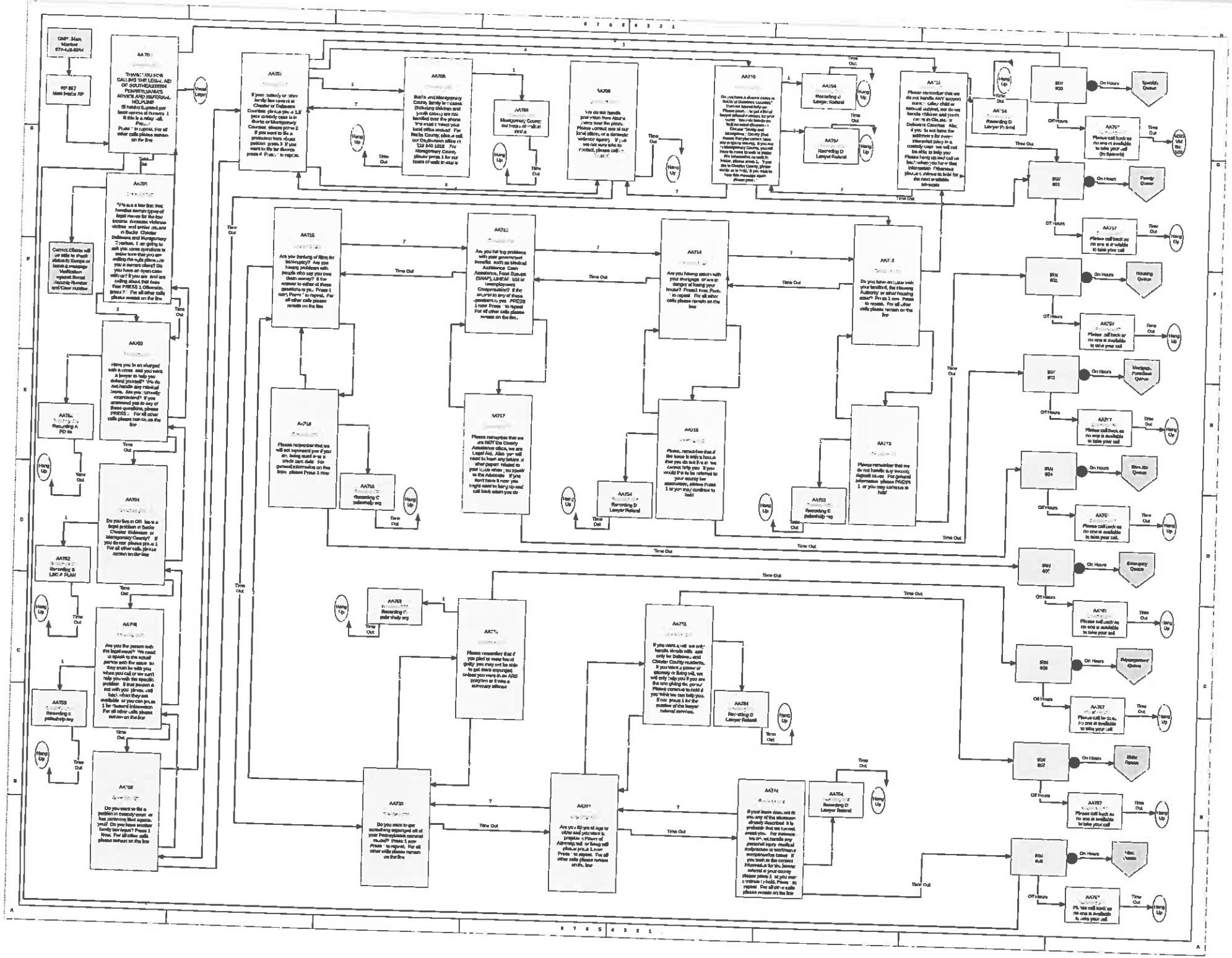
8 If no, what could we do to improve the phone system?

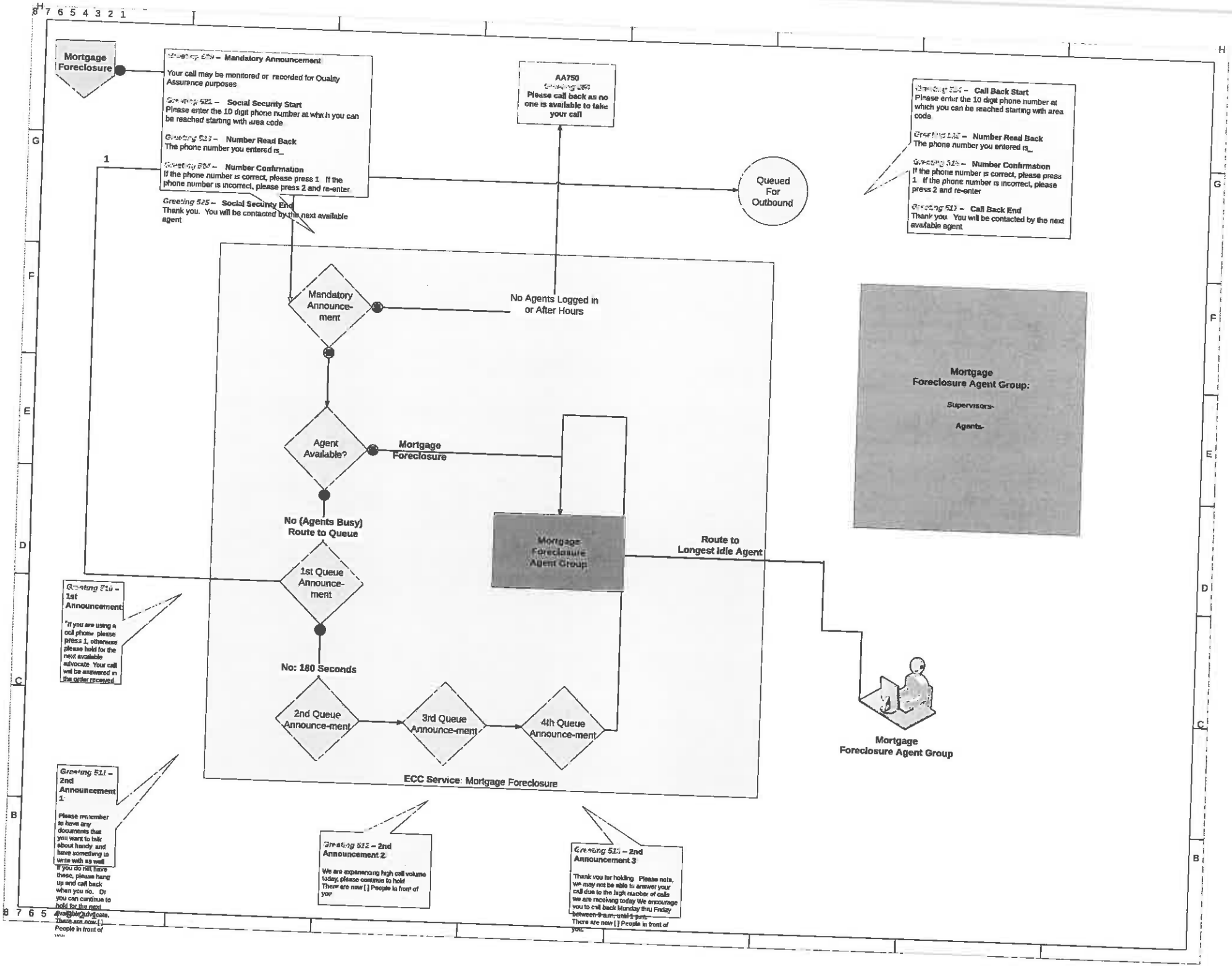
1	better info needs to be given
2	more time periods to call. Timely call backs
3	shorten the wait time on the phone. More info on how to get help.
4	very helpful and caring
5	
6	
7	
8	

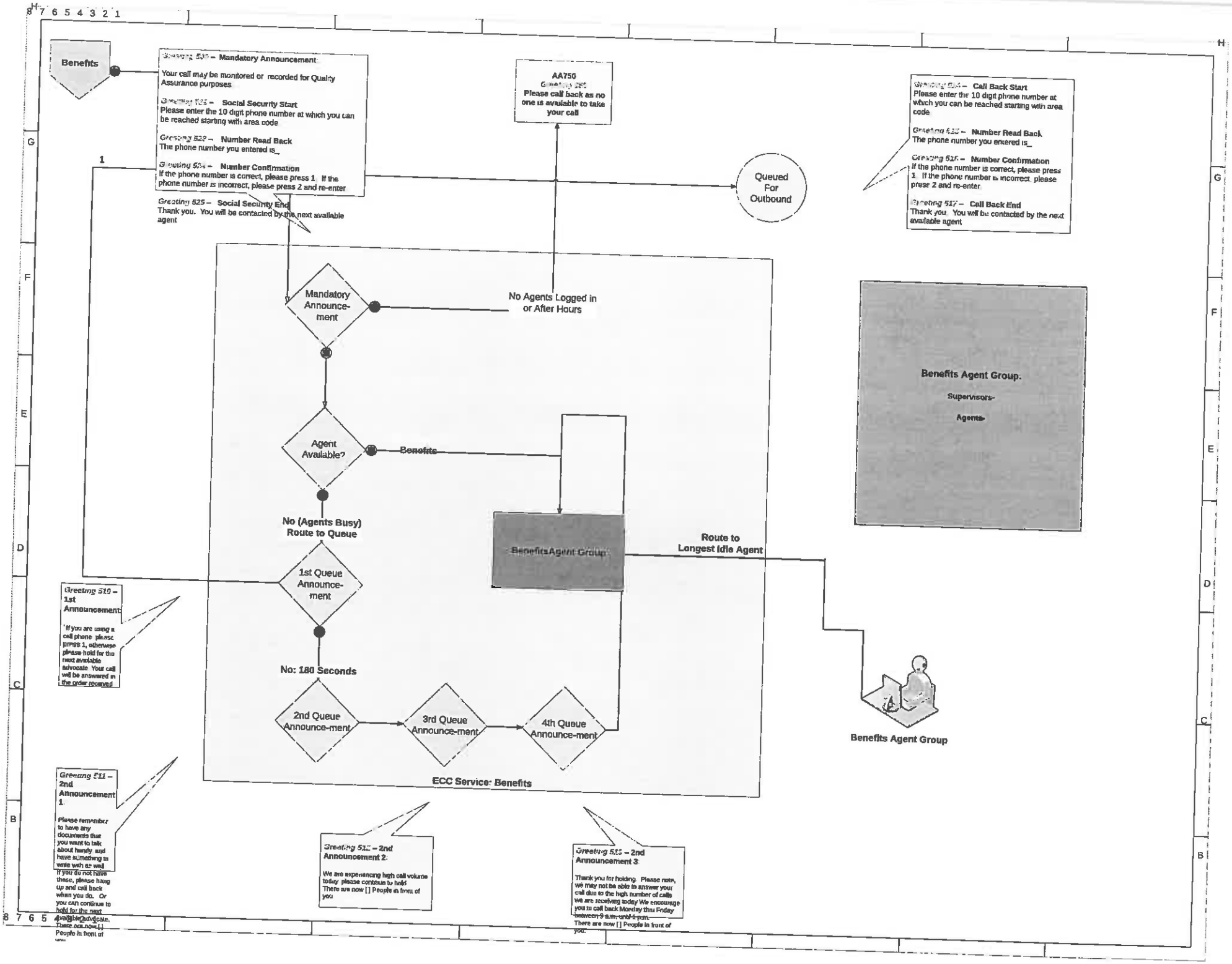

Spanish
Greeting 501 – Spanish Mandatory Announcement
Your call may be monitored or recorded for Quality Assurance purposes
Greeting 520 – Spanish Social Security Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 521 – Spanish Number Read Back
The phone number you entered is_
Greeting 525 – Spanish Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter
Greeting 522 – Spanish End
Thank you. You will be contacted by the next available agent
1
AA755
Greeting 555
Please call back as no one is available to take your call. Please hold to leave a msg
(In Spanish)
Time Out
MSG VM Box 500
Queued For Outbound
Greeting 505 – Spanish Call Back Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 506 – Spanish Number Read Back
The phone number you entered is_
Greeting 507 – Spanish Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter
Greeting 508 – Spanish Call Back End
Thank you. You will be contacted by the next available agent
Mandatory Announce-ment
No Agents Logged in or After Hours
Agent Available?
No (Agents Busy) Route to Queue
1st Queue Announce-ment
No: 180 Seconds
2nd Queue Announce-ment
3rd Queue Announce-ment
4th Queue Announce-ment
Spanish Agent Group
Route to Longest Idle Agent
ECC Service: Spanish
Spanish Agent Group
Supervisors-
Agents-
Spanish Agent Group
Greeting 501 – Spanish 1st Announcement
"If you are using a cell phone please press 1, otherwise please hold for the next available advocate. Your call will be answered in the order received
Greeting 502 – Spanish 2nd Announcement 1
Please remember to have any documents that you want to talk about handy and have something to write with as well. If you do not have these, please hang up and call back when you do. Or you can continue to hold for the next available advocate. There are now [ ] People in front of you
Greeting 503 – Spanish 2nd Announcement 2
We are experiencing high call volume today, please continue to hold
There are now [ ] People in front of you
Greeting 504 – 2nd Announcement 3
Thank you for holding. Please note, we may not be able to answer your call due to the high number of calls we are receiving today. We encourage you to call back Monday thru Friday between 9 am until 5 pm.
There are now [ ] People in front of you.

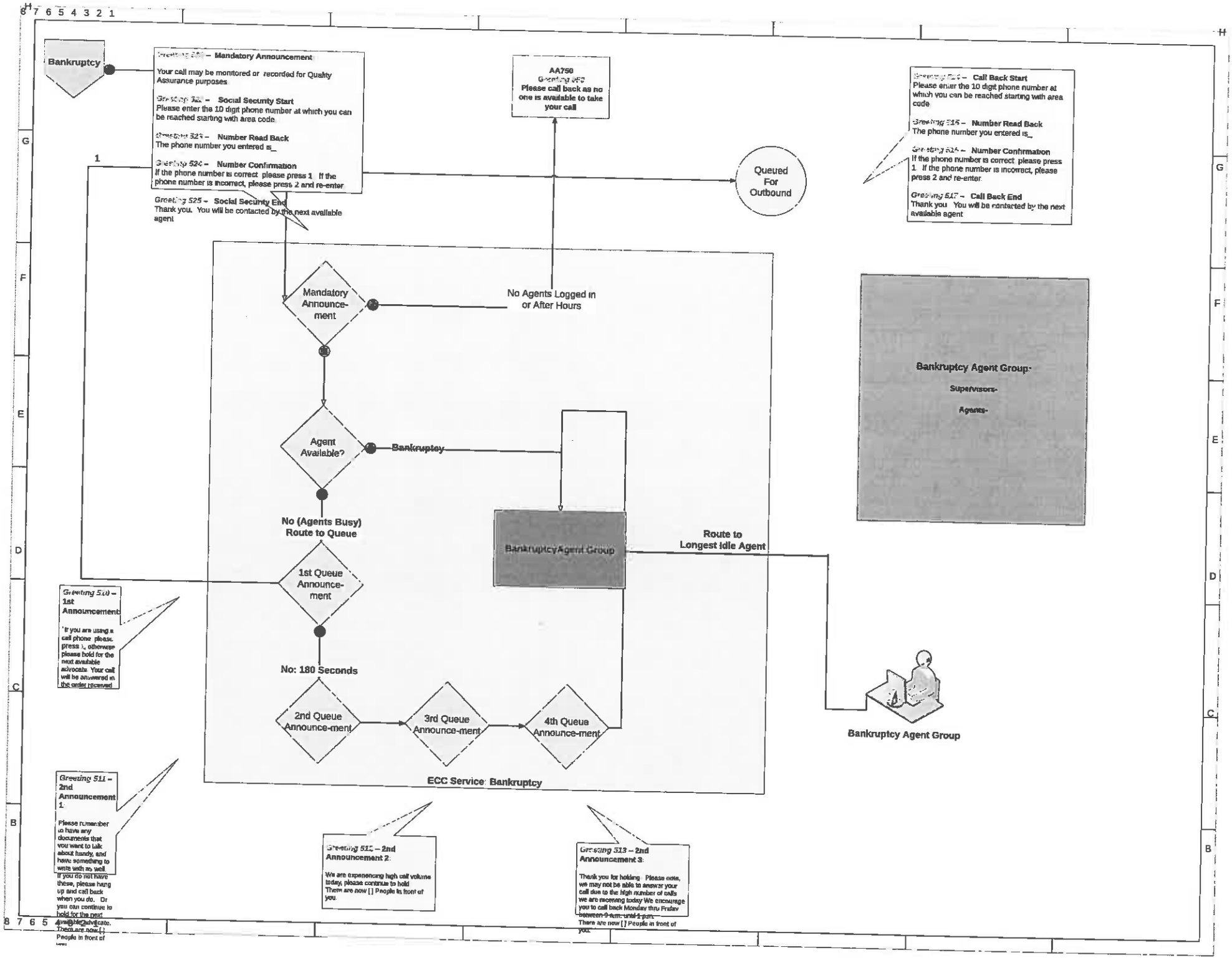

Family
Greeting 501 – Mandatory Announcement
Your call may be monitored or recorded for Quality Assurance purposes
Greeting 502 – Social Security Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 503 – Number Read Back
The phone number you entered is_
Greeting 504 – Number Confirmation
If the phone number is correct, please press 1 If the phone number is incorrect, please press 2 and re-enter
Greeting 505 – Social Security End
Thank you. You will be contacted by the next available agent
1
AA750
Greeting 506
Please call back as no one is available to take your call
Queued For Outbound
Greeting 514 – Call Back Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 515 – Number Read Back
The phone number you entered is_
Greeting 516 – Number Confirmation
If the phone number is correct, please press 1 If the phone number is incorrect, please press 2 and re-enter.
Greeting 517 – Call Back End
Thank you You will be contacted by the next available agent
No Agents Logged in or After Hours
Mandatory Announce-ment
Agent Available?
No (Agents Busy) Route to Queue
1st Queue Announce-ment
No: 180 Seconds
2nd Queue Announce-ment
3rd Queue Announce-ment
4th Queue Announce-ment
Family Agent Group
Route to Longest Idle Agent
ECC Service- Family
Family Agent Group:
Supervisors-
Agents-
Family Agent Group
Greeting 510 – 1st Announcement:
"If you are using a cell phone please press 1, otherwise please hold for the next available advocate. Your call will be answered in the order received.
Greeting 511 – 2nd Announcement 1:
Please remember to have any documents that you want to talk about handy and have something to write with as well. If you do not have these, please hang up and call back when you do. Or you can continue to hold for the next available advocate. There are now [ ] People in front of you
Greeting 512 – 2nd Announcement 2:
We are experiencing high call volume today, please continue to hold There are now [ ] People in front of you
Greeting 513 – 2nd Announcement 3:
Thank you for holding Please note we may not be able to answer your call due to the high number of calls we are receiving today We encourage you to call back Monday thru Friday between 9 a.m. until 1 p.m. There are now [ ] People in front of you.

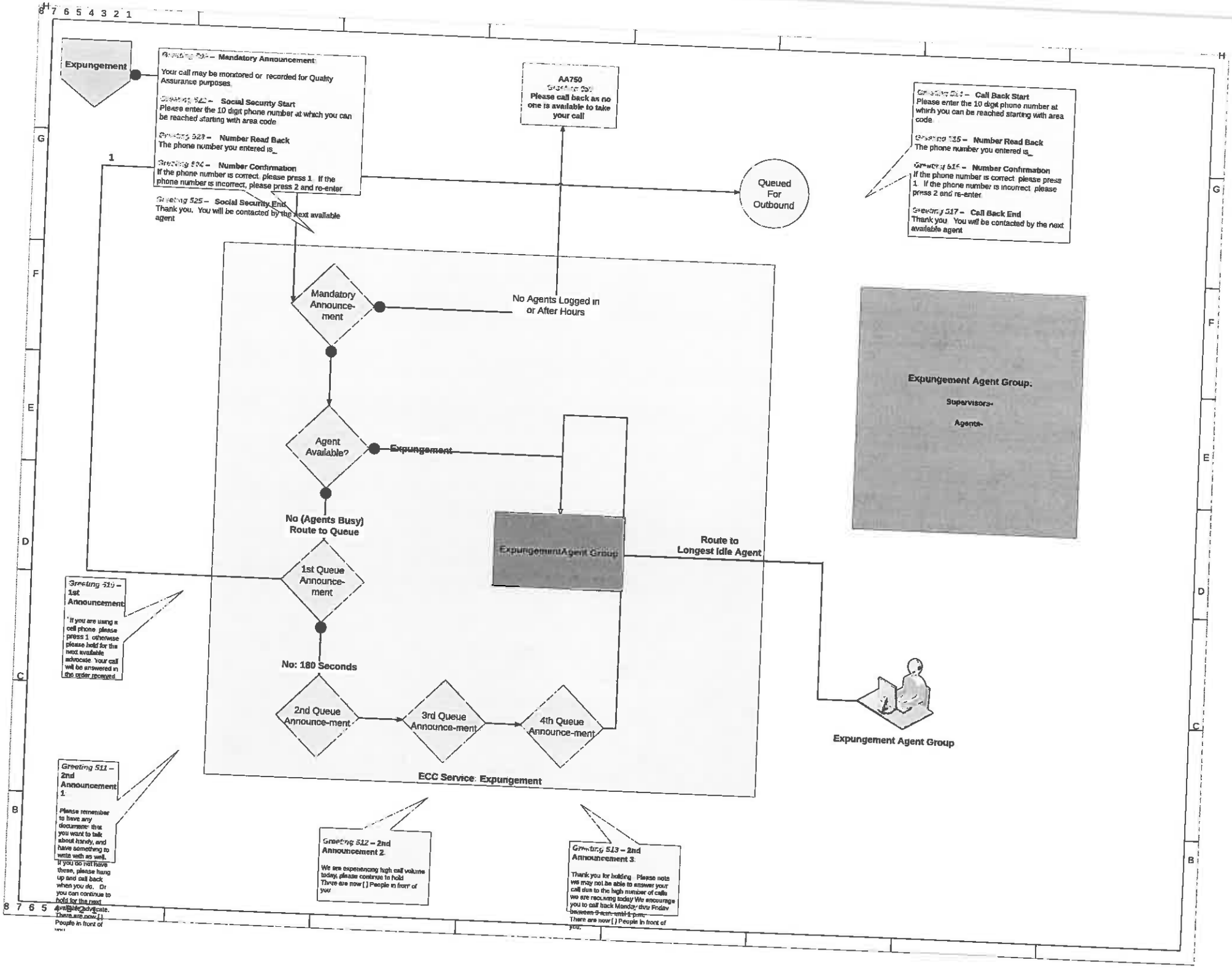

Housing
Greeting 503 – Mandatory Announcement
Your call may be monitored or recorded for Quality Assurance purposes
Greeting 511 – Social Security Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 512 – Number Read Back
The phone number you entered is_
Greeting 513 – Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter.
Greeting 522 – Social Security End
Thank you. You will be contacted by the next available agent
AA750
Greeting 156
Please call back as no one is available to take your call
Queued For Outbound
Greeting 511 – Call Back Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 515 – Number Read Back
The phone number you entered is_
Greeting 516 – Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter.
Greeting 517 – Call Back End
Thank you. You will be contacted by the next available agent
Mandatory Announce-ment
No Agents Logged in or After Hours
Agent Available?
No (Agents Busy) Route to Queue
1st Queue Announce-ment
No: 180 Seconds
2nd Queue Announce-ment
3rd Queue Announce-ment
4th Queue Announce-ment
Housing Agent Group
Route to Longest Idle Agent
ECC Service: Housing
Housing Agent Group.
Supervisors-
Agents-
Housing Agent Group
Greeting 510 – 1st Announcement:
"If you are using a cell phone, please press 1, otherwise please hold for the next available advocate. Your call will be answered in the order received
Greeting 511 – 2nd Announcement 1:
Please remember to have any documents that you want to talk about handy, and have something to write with as well. If you do not have these, please hang up and call back when you do. Or you can continue in hold for the next available advocate. There are now [ ] People in front of you
Greeting 512 – 2nd Announcement 2:
We are experiencing high call volume today, please continue to hold. There are now [ ] People in front of you
Greeting 513 – 2nd Announcement 3:
Thank you for holding. Please note we may not be able to answer your call due to the high number of calls we are receiving today. We encourage you to call back Monday thru Friday between 9 a.m. and 4 p.m. There are now [ ] People in front of you.

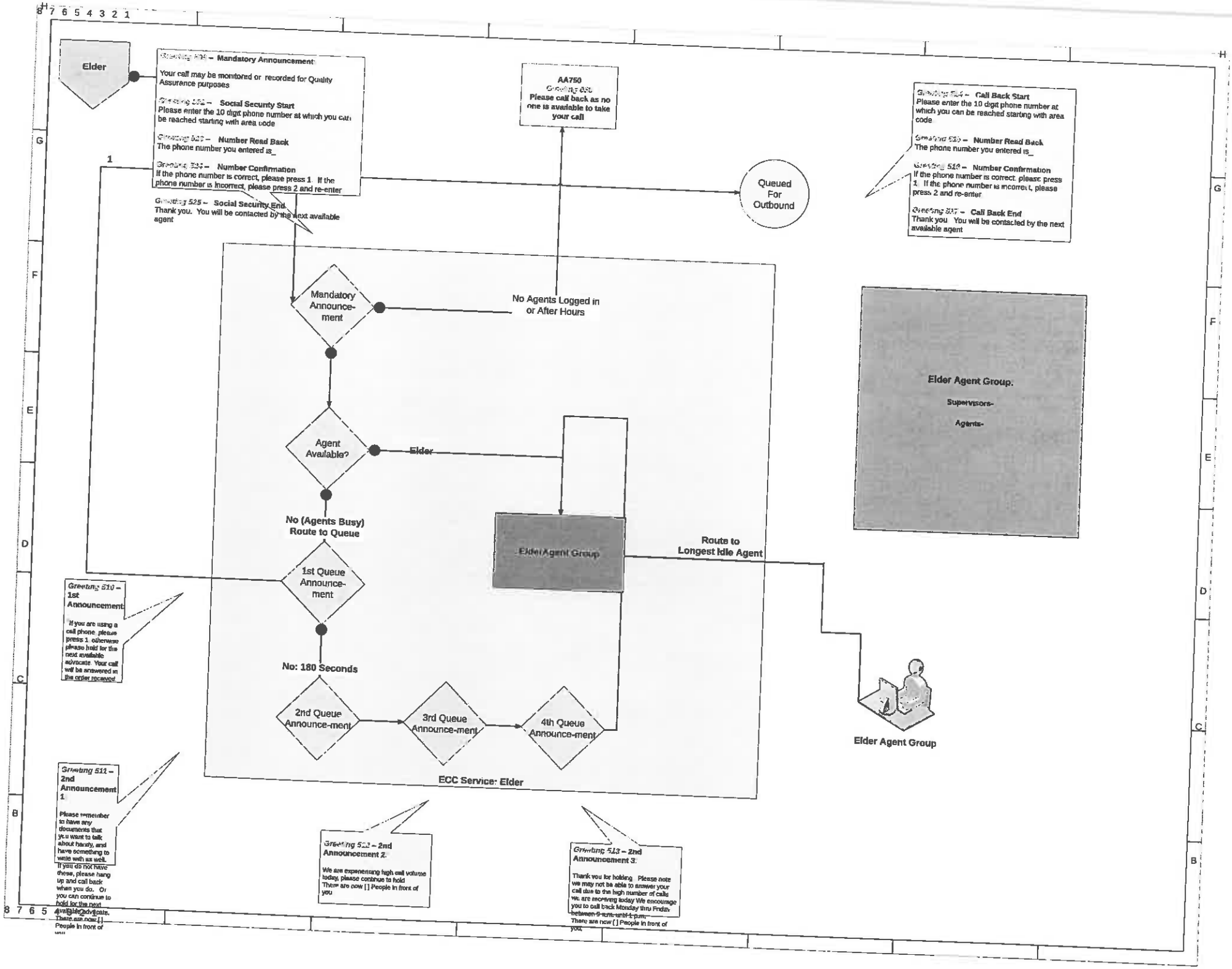

Time Out
Hang Up
On Hours
Off Hours
Spanish Queue
Family Queue
Housing Queue
Mortgage Foreclosure Queue
Bankruptcy Queue
Expungement Queue
Misc. Queue
Misc. Queue

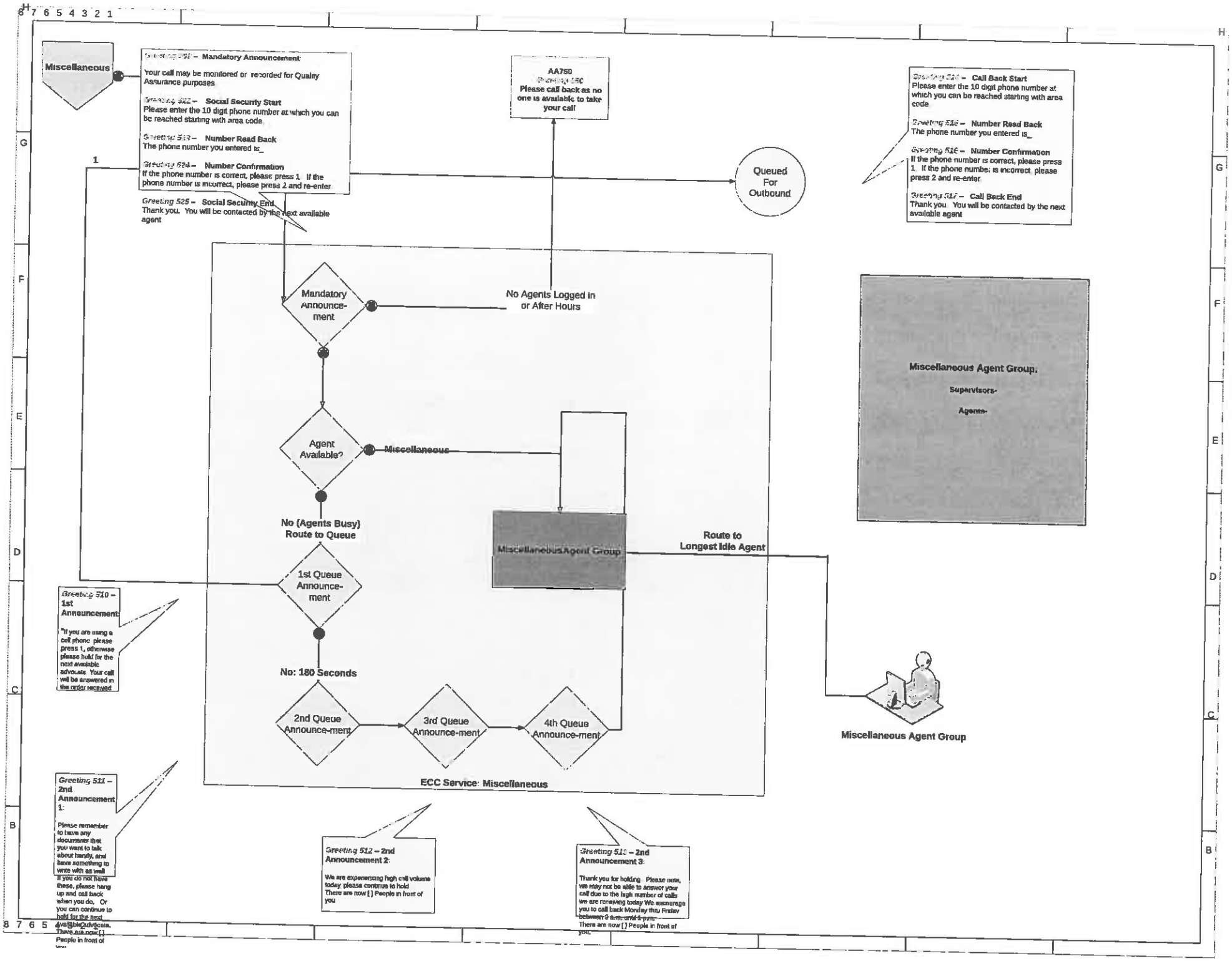

Mortgage Foreclosure
Greeting 519 – Mandatory Announcement
Your call may be monitored or recorded for Quality Assurance purposes
Greeting 521 – Social Security Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 523 – Number Read Back
The phone number you entered is_
Greeting 524 – Number Confirmation
If the phone number is correct, please press 1 If the phone number is incorrect, please press 2 and re-enter
Greeting 525 – Social Security End
Thank you. You will be contacted by the next available agent
1
AA750
Greeting 550
Please call back as no one is available to take your call
Queued For Outbound
Greeting 514 – Call Back Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 516 – Number Read Back
The phone number you entered is_
Greeting 518 – Number Confirmation
If the phone number is correct, please press 1 If the phone number is incorrect, please press 2 and re-enter
Greeting 517 – Call Back End
Thank you You will be contacted by the next available agent
Mandatory Announce-ment
No Agents Logged in or After Hours
Agent Available?
Mortgage Foreclosure
No (Agents Busy) Route to Queue
1st Queue Announce-ment
Mortgage Foreclosure Agent Group
Route to Longest Idle Agent
No: 180 Seconds
2nd Queue Announce-ment
3rd Queue Announce-ment
4th Queue Announce-ment
ECC Service: Mortgage Foreclosure
Mortgage Foreclosure Agent Group:
Supervisors-
Agents-
Mortgage Foreclosure Agent Group
Greeting 510 – 1st Announcement
"If you are using a cell phone please press 1, otherwise please hold for the next available advocate Your call will be answered in the order received
Greeting 511 – 2nd Announcement 1
Please remember to have any documents that you want to talk about handy and have something to write with as well If you do not have these, please hang up and call back when you do. Or you can continue to hold for the next available advocate. There are now [ ] People in front of you
Greeting 512 – 2nd Announcement 2
We are experiencing high call volume today, please continue to hold There are now [ ] People in front of you
Greeting 513 – 2nd Announcement 3
Thank you for holding. Please note, we may not be able to answer your call due to the high number of calls we are receiving today We encourage you to call back Monday thru Friday between 9 a.m. until 1 pm. There are now [ ] People in front of you.


Benefits
Greeting 510 – Mandatory Announcement
Your call may be monitored or recorded for Quality Assurance purposes
Greeting 522 – Social Security Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 523 – Number Read Back
The phone number you entered is_
Greeting 524 – Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter
Greeting 525 – Social Security End
Thank you. You will be contacted by the next available agent
1
AA750
Greeting 285
Please call back as no one is available to take your call
Queued For Outbound
Greeting 514 – Call Back Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 515 – Number Read Back
The phone number you entered is_
Greeting 516 – Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter
Greeting 517 – Call Back End
Thank you. You will be contacted by the next available agent
Mandatory Announce-ment
No Agents Logged in or After Hours
Agent Available?
Benefits
No (Agents Busy) Route to Queue
1st Queue Announce-ment
No: 180 Seconds
2nd Queue Announce-ment
3rd Queue Announce-ment
4th Queue Announce-ment
Benefits Agent Group
Route to Longest Idle Agent
ECC Service: Benefits
Benefits Agent Group:
Supervisors-
Agents-
Benefits Agent Group
Greeting 510 – 1st Announcement
"If you are using a cell phone please press 1, otherwise please hold for the next available advocate. Your call will be answered in the order received
Greeting 511 – 2nd Announcement 1
Please remember to have any documents that you want to talk about handy and have something to write with as well
If you do not have these, please hang up and call back when you do. Or you can continue to hold for the next available advocate. There are now [ ] People in front of you
Greeting 512 – 2nd Announcement 2
We are experiencing high call volume today please continue to hold
There are now [ ] People in frnu of you
Greeting 513 – 2nd Announcement 3
Thank you for holding. Please note, we may not be able to answer your call due to the high number of calls we are receiving today We encourage you to call back Monday thru Friday between 9 a.m. until 2 p.m.
There are now [ ] People in front of you.


Bankruptcy
Greeting 500 – Mandatory Announcement
Your call may be monitored or recorded for Quality Assurance purposes
Greeting 521 – Social Security Start
Please enter the 10 digit phone number at which you can be reached starting with area code.
Greeting 523 – Number Read Back
The phone number you entered is_
Greeting 524 – Number Confirmation
If the phone number is correct please press 1. If the phone number is incorrect, please press 2 and re-enter
1
Greeting 525 – Social Security End
Thank you. You will be contacted by the next available agent
AA750
Greeting 502
Please call back as no one is available to take your call
Queued For Outbound
Greeting 516 – Call Back Start
Please enter the 10 digit phone number at which you can be reached starting with area code.
Greeting 518 – Number Read Back
The phone number you entered is_
Greeting 519 – Number Confirmation
If the phone number is correct please press 1. If the phone number is incorrect, please press 2 and re-enter.
Greeting 517 – Call Back End
Thank you. You will be contacted by the next available agent
Mandatory Announce-ment
No Agents Logged in or After Hours
Agent Available?
Bankruptcy
No (Agents Busy) Route to Queue
1st Queue Announce-ment
No: 180 Seconds
2nd Queue Announce-ment
3rd Queue Announce-ment
4th Queue Announce-ment
BankruptcyAgent Group
Route to Longest Idle Agent
ECC Service: Bankruptcy
Bankruptcy Agent Group-
Supervisors-
Agents-
Bankruptcy Agent Group
Greeting 510 – 1st Announcement
If you are using a call phone please press 1, otherwise please hold for the next available advocate. Your call will be answered in the order received
Greeting 511 – 2nd Announcement 1:
Please remember to have any documents that you want to talk about handy, and have something to write with as well. If you do not have these, please hang up and call back when you do. Or you can continue to hold for the next available advocate. There are now [ ] People in front of you
Greeting 512 – 2nd Announcement 2:
We are experiencing high call volume today, please continue to hold There are now [ ] People in front of you.
Greeting 513 – 2nd Announcement 3:
Thank you for holding. Please note, we may not be able to answer your call due to the high number of calls we are receiving today We encourage you to call back Monday thru Friday between 9 a.m. until 1 p.m. There are now [ ] People in front of you.


Expungement
Greeting 501 – Mandatory Announcement:
Your call may be monitored or recorded for Quality Assurance purposes.
Greeting 502 – Social Security Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 503 – Number Read Back
The phone number you entered is_
Greeting 504 – Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter
1
Greeting 505 – Social Security End
Thank you. You will be contacted by the next available agent
AA750
Greeting 506
Please call back as no one is available to take your call
Queued For Outbound
Greeting 514 – Call Back Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 515 – Number Read Back
The phone number you entered is_
Greeting 516 – Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter
Greeting 517 – Call Back End
Thank you. You will be contacted by the next available agent
Mandatory Announce-ment
No Agents Logged in or After Hours
Agent Available?
Expungement
No (Agents Busy) Route to Queue
1st Queue Announce-ment
No: 180 Seconds
2nd Queue Announce-ment
3rd Queue Announce-ment
4th Queue Announce-ment
ExpungementAgent Group
Route to Longest Idle Agent
ECC Service: Expungement
Expungement Agent Group:
Supervisors-
Agents-
Expungement Agent Group
Greeting 510 – 1st Announcement:
"If you are using a cell phone, please press 1, otherwise please hold for the next available advocate. Your call will be answered in the order received
Greeting 511 – 2nd Announcement 1:
Please remember to have any documents that you want to talk about handy, and have something to write with as well. If you do not have these, please hang up and call back when you do. Or you can continue to hold for the next available advocate. There are now [ ] People in front of you
Greeting 512 – 2nd Announcement 2:
We are experiencing high call volume today, please continue to hold. There are now [ ] People in front of you
Greeting 513 – 2nd Announcement 3:
Thank you for holding. Please note we may not be able to answer your call due to the high number of calls we are receiving today. We encourage you to call back Monday thru Friday between 9 a.m. until 3 p.m. There are now [ ] People in front of you.


Elder
Greeting 500 – Mandatory Announcement
Your call may be monitored or recorded for Quality Assurance purposes
Greeting 502 – Social Security Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 503 – Number Read Back
The phone number you entered is_
Greeting 504 – Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter
Greeting 505 – Social Security End
Thank you. You will be contacted by the next available agent
1
AA750
Greeting 506
Please call back as no one is available to take your call
Queued For Outbound
Greeting 514 – Call Back Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 515 – Number Read Back
The phone number you entered is_
Greeting 516 – Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter
Greeting 517 – Call Back End
Thank you. You will be contacted by the next available agent
Mandatory Announce-ment
No Agents Logged in or After Hours
Agent Available?
Elder
No (Agents Busy) Route to Queue
1st Queue Announce-ment
Elder Agent Group
Route to Longest Idle Agent
No: 180 Seconds
2nd Queue Announce-ment
3rd Queue Announce-ment
4th Queue Announce-ment
ECC Service: Elder
Elder Agent Group.
Supervisors-
Agents-
Elder Agent Group
Greeting 510 – 1st Announcement
If you are using a cell phone, please press 1, otherwise please hold for the next available advocate. Your call will be answered in the order received
Greeting 511 – 2nd Announcement 1
Please remember to have any documents that you want to talk about handy, and have something to write with as well. If you do not have these, please hang up and call back when you do. Or you can continue to hold for the next available advocate. There are now [ ] People in front of you
Greeting 512 – 2nd Announcement 2.
We are experiencing high call volume today, please continue to hold
There are now [ ] People in front of you
Greeting 513 – 2nd Announcement 3.
Thank you for holding. Please note we may not be able to answer your call due to the high number of calls we are receiving today. We encourage you to call back Monday thru Friday between 9 a.m. until 4 p.m.
There are now [ ] People in front of you.


Miscellaneous
Greeting 521 – Mandatory Announcement
Your call may be monitored or recorded for Quality Assurance purposes
Greeting 522 – Social Security Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 523 – Number Read Back
The phone number you entered is_
Greeting 524 – Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter
1
Greeting 525 – Social Security End
Thank you. You will be contacted by the next available agent
AA750
Greeting 550
Please call back as no one is available to take your call
Queued For Outbound
Greeting 516 – Call Back Start
Please enter the 10 digit phone number at which you can be reached starting with area code
Greeting 518 – Number Read Back
The phone number you entered is_
Greeting 516 – Number Confirmation
If the phone number is correct, please press 1. If the phone number is incorrect, please press 2 and re-enter
Greeting 517 – Call Back End
Thank you. You will be contacted by the next available agent
Mandatory Announce-ment
No Agents Logged in or After Hours
Agent Available?
Miscellaneous
No (Agents Busy) Route to Queue
Miscellaneous Agent Group
Route to Longest Idle Agent
1st Queue Announce-ment
No: 180 Seconds
2nd Queue Announce-ment
3rd Queue Announce-ment
4th Queue Announce-ment
ECC Service: Miscellaneous
Miscellaneous Agent Group.
Supervisors-
Agents-
Miscellaneous Agent Group
Greeting 510 – 1st Announcement:
"If you are using a cell phone please press 1, otherwise please hold for the next available advocate. Your call will be answered in the order received
Greeting 511 – 2nd Announcement 1:
Please remember to have any documents that you want to talk about handy, and have something to write with as well
If you do not have these, please hang up and call back when you do. Or you can continue to hold for the next available advocate.
There are now [ ] People in front of you
Greeting 512 – 2nd Announcement 2:
We are experiencing high call volume today please continue to hold
There are now [ ] People in front of you
Greeting 513 – 2nd Announcement 3:
Thank you for holding. Please note, we may not be able to answer your call due to the high number of calls we are receiving today We encourage you to call back Monday thru Friday between 9 a.m. and 5 p.m.
There are now [ ] People in front of you.

CALL FLOW LANGUAGE

AA 701

Greeting 001

THANK YOU FOR CALLING THE LEGAL AID OF SOUTHEASTERN PENNSYLVANIA'S ADVICE AND REFERRAL HELPLINE.

Si hablos Espanol por favor oprima el numero 1

If you have a speech or hearing disability and are calling through a Relay Operator, or if english is not your native language, please Press 2. All others please continue to hold.

AA702

Greeting 002

We are a law firm that handles certain types of legal problems for the low income, for domestic violence victims, and for senior citizens in Bucks, Chester, Delaware and Montgomery Counties. We are going to ask you some questions to make sure that you are calling the right place. Please listen closely, and we thank you for your patience. If at any time, you want to hear a message again, please press *.

Are you a current client with an open case with us? If you are, and are calling about that case, then PRESS 1. If you are applying for services, please press 2."

AA703

Greeting 003

Have you been charged with a crime and you want a lawyer to help you defend yourself? We do not handle any criminal cases. Are you currently incarcerated or in jail? If you answered yes to any of these questions, please PRESS 1. If not, please continue to hold

AA704

Greeting 004

Do you live in OR have a legal problem in Bucks, Chester, Delaware, or Montgomery County? If you answered no to both of these questions, please press 1. If you do live or have a legal problem in Bucks, Chester, Delaware, or Montgomery County, please continue to hold.

AA705

Greeting 005

Are you the person with the legal problem? We need to speak to the actual person with the problem, so they must be with you when you call or we can't help you. If that person is not with you right now, please call back when they are, or you can press 1 for General Information that you might find helpful. If you are calling for yourself and not for someone else, please continue to hold.

AA706

Greeting 006

Do you want to file a petition in custody court, or has someone filed against you? Do you have another family law issue like divorce or support? If you answered yes to either of these questions, press 1 Now. If not, please continue to hold. To return to the previous menu, press 7.

AA707

Greeting 007

Is your custody case in Chester County or Delaware County? If you answered yes, please press 1. Is your custody case in Bucks or Montgomery Counties? If so, please press 2. Do you need to file a protection from abuse petition? Then please press 3. Do you want to file for divorce? Then please press 4. If you wish to hear this message again, please press *

AA708

Greeting 008

Bucks and Montgomery County family law cases (including children and youth cases) are not handled over the phone. You must contact your local office instead. For Bucks County, please call our Doylestown office at 215-340-1818. For Montgomery County, please press 1 for our hours of walk in intake. If you wish to hear this message again, please press *

AA709

Greeting 009

We do not handle Protection from Abuse cases over the phone. Please contact one of our local offices or a domestic violence agency. If you are not sure who to contact, please call 1-800-799-SAFE (7233). If you feel that you are in immediate danger, please hang up and dial 911. If you wish to hear this message again, please press *

AA710

Greeting 010

Do you have a divorce cases in Bucks or Delaware Counties? Then we cannot help you. Please press 1 to get a list of lawyer referral numbers for your county. We only handle no fault no asset divorces in Chester County and Montgomery County (that means that you cannot have any property issues). If you are in Montgomery County, you will have to come to walk in intake. For information on walk in intake, please press 2. If you are in Chester County, please continue to hold. If you wish to hear this message again, please press *

AA711

Greeting 011

Are you calling about a support issue, either child or spousal support? Are you calling about a children and youth case in Chester County or Delaware County? If you answered yes to either of these questions, we cannot help you. . Please press 1 to get a list of lawyer referral numbers for your county. If you do not have the addresses for every interested party in a custody case, we will not be able to help you. Please hang up and call us back when you have that information. Otherwise, please continue to hold for the next available advocate. If you wish to hear this message again, please press *

AA712

Greeting 012

Do you have an issue with your landlord, the Housing Authority, or any other landlord/tenant problem? Press 1 now. All others please stay on the line.

AA713

Greeting 013

Please remember that we do not handle any security deposit cases, and we do not represent any landlords. For general information on security deposits, please PRESS 1, or you can continue to hold.

AA714

Greeting 014

Are you having issues with your mortgage, or are in danger of losing your house? Press1 now. All others please continue to hold.

AA715

Greeting 015

Please remember that if the issue is with a house that you do not live in, we cannot help you. If you would like to be referred to your county bar association, please Press 1 or you may continue to hold.

AA716

Greeting 016

Are you having problems with your government benefits, such as Medical Assistance, Cash Assistance, Food Stamps, otherwise known as SNAP, LIHEAP, which is an energy program, SSI or unemployment Compensation? If the answer to any of these questions is yes: PRESS 1 NOW. All others please continue to hold. If you wish to hear this message again, please press * To return to the previous menu, press 7.

AA717

Greeting 017

Please remember that we are NOT the County Assistance office, we are Legal Aid. If you want to speak to your caseworker, you have to call your County Assistance Office. Also, you will need to have any letters or any other papers related to your issue when you speak to the Advocate. If you don't have it now, you might want to hang up and call back when you do. Otherwise, please continue to hold.

AA718

Greeting 018

Are you thinking of filing for bankruptcy? Are you having problems with people who say you owe them money? If the answer to either of these questions is yes, Press 1 now. Otherwise, please continue to hold.

AA719

Greeting 019

Please remember that we will not represent you if you are being sued over a credit card debt. For general information on this topic, please Press 1 now. Otherwise, please continue to hold.

AA720

Greeting 020

Are you having problems finding a job or housing because of a criminal record? If so, Press 1 now. All others, continue to hold.

AA721

Greeting 021

Please remember that if you pled or were found guilty, you may not be able to get that expunged unless you were in an ARD program or it was a summary offense. If you have something on your record that

cannot be expunged, we will not be able to help you. If so, please press 1 for some general information. Otherwise, please continue to hold.

AA722

Greeting 022

Are you 60 yrs of age or older and you want to prepare a Power of Attorney, will, or living will? If so, please press 1 now. Otherwise, please continue to hold.

AA723

Greeting 023

If you want a will, we only handle simple wills, and only for Delaware County and Chester County residents. If you want a power of attorney, we will only help you if you are the one giving the power of attorney to someone else, and NOT if you are the one receiving it. If you want a living will, we handle this in Bucks, Chester, Delaware, and Montgomery Counties. Please continue to hold if you think we can help you. If not, press 1 for the number of the lawyer referral services. If you want to hear this message again, please press *

AA724

Greeting 024

If we haven't already mentioned your type of problem, chances are that we may not be able to help you. For instance, we do not handle any personal injury, medical malpractice or workman's compensation cases. We do not probate estates, and we do not handle traffic tickets. If you want the contact information for the lawyer referral in your county, please press 1, or you may continue to hold. If you want to hear this message again, please press *. To return to the previous menu, press 7.

Greeting 509 – Mandatory Announcement:

Your call may be monitored or recorded for Quality Assurance purposes. In order to expedite the process, please enter your nine digit social security number now. Be assured that all of your personal information will be kept confidential.

Greeting 510 – 1st Announcement:

If you are using a cell phone, please press 1. Otherwise, please hold for the next available advocate. Your call will be answered in the order received.

Greeting 511 – 2nd Announcement 1:

Please remember to have any documents that you want to talk about handy, and have something to write with as well. If you do not have these, please hang up and call back when you do. If you do have everything you need to talk with us, then continue to hold for the next available advocate. There are now [] people in front of you.

Greeting 512 – 2nd Announcement 2:

We are experiencing high call volume today. Please continue to hold.

There are now [] people in front of you.

Greeting 513 – 2nd Announcement 3:

Thank you for holding. Please note, we may not be able to answer your call due to the high number of calls we are receiving today. We encourage you to call back another time. Our hours are Monday thru Friday between the hours of 9 a.m. until 1 p.m. We are sorry for any inconvenience. There are now [] people in front of you.

Greeting 514 - call back start

If you are on a cell phone, we can give you a call back. To do this, please enter the 10 digit phone number at which you can be reached, starting with the area code.

Greeting 515 - Number Read Back

The phone number you entered is _____

Greeting 516 - NUMBER CONFIRMATION

If the phone number is correct, please press 1. If the phone number is wrong, please press 2 and re-enter.

Greeting 517 - Call Back End

Thank you. You may now hang up and an Advocate will call you back shortly. Your call will be returned by the next available Advocate, but if we are unable to reach you, you will have to call back another time. We will not leave a message.

AA750

Greeting 050:

Please call back as no one is available to take your call. Our normal hours are Monday through Friday, 9:00 am to 1:00 pm, excluding holidays. We apologize for any inconvenience this might cause.

AA751 Greeting 051

The Public Defender's Office provides legal assistance to persons who are accused of criminal offenses by the Commonwealth of Pennsylvania and who cannot afford a lawyer.

The Bucks County Public Defender's phone number is 215-348-6344

The Chester County Public Defender's phone number is 610-344-6940

The Delaware County Public Defender's phone number is 610-891-4100

The Montgomery County Public Defender's phone number is 610-278-3295.

If you are currently in jail, and want help with a civil matter, please contact the Institutional Law project at (215) 925-2966.

You can also find these numbers listed on Legal Aid of Southeastern Pennsylvania's website at www.lasp.org

To repeat this message, please press *

AA752 GREETING 052

If you do not live in Pennsylvania, or your legal problem is outside of Pennsylvania, please call the Legal Services Corporation at 202.295.1500 for information regarding other States' Legal Service organizations.

If you you do live in Pennsylvania, but you are not a resident of Bucks, Chester, Delaware or Montgomery Counties, OR your legal problem is outside of these counties, please contact the Pennsylvania Legal Network at 800-322-7572 for the contact information of other Pennsylvania Legal Aid organizations.

You may also visit our website, www.lasp.org, for this information.

AA753 GREETING 073

For general information on a variety of legal topics, please visit the website www.palawhelp.org

PALawHelp has pamphlets, booklets, and links to other sites with information about all sorts of legal issues specific to Pennsylvania. This information has been prepared by legal aid organizations, bar associations, and government agencies, among others. In some cases, it has self-help materials that can help you with filing things in court.

AA754 GREETING 054

Each of our County Bar Associations operate a Lawyer Referral Service. You can call this number to obtain the contact information of Attorneys who handle the type of case that you think you might have. They will meet with you for a flat fee for an initial consultation.

The Bucks County Lawyer Referral Number is 1-888-991-9922

The Chester County Lawyer Referral number is 610-429-1500

The Delaware County Lawyer Referral number is 610-566-6625 x 221

The Montgomery County Lawyer Referral is number is 610 279 9660 x 201

You can also visit our website for this information at www.lasp.org

AA755 Greeting 055

Montgomery County has the following walk in hours: The Norristown Office, located at 625 Swede Street in Norristown is open for walk-in intake every Monday, Thursday and Friday from 1:30 to 4:00. The Pottstown Office, located at 248 King Street in Pottstown is open for walk-in intake every Monday, Thursday and Friday from 1:30 to 4:00. The Lansdale Outreach Office is located at Manna, 713 West Main Street in Lansdale and is open on Wednesday from 2:00 to 3:30. The Willow Grove Outreach Office is located at the Montgomery County Courthouse Annex Building, 102 York Road, Suite 303 and is open on Thursdays from 2:00 to 3:30.

Off Hours greeting

We are a law firm that handles certain types of legal problems for the low income, for domestic violence victims, and for senior citizens in Bucks, Chester, Delaware and Montgomery Counties. Our Helpline phone hours are Monday through Friday, 9 a.m. to 1 p.m. Our office is currently closed. If you are a current client with an open case, and you are calling about that case, then PRESS 1. If you want help because you've been charged with a crime, we do not handle those types of cases. Please Press 2 for a list of phone numbers for the public defenders. If you do not live in Bucks, Chester, Delaware or Montgomery Counties OR your problem isn't in one of those counties, you need to speak to another legal aid organization. For contact information, please press 3. If you are not the person with the legal problem, and you are calling for someone else, you will have to call back with that person with you or else we cannot help you. If you are calling for help because you are a victim of domestic violence, and you want a Protection from Abuse Order, please call 1-800-799-7233 or one of our local offices. If you feel that you are in immediate danger, please dial 911.

Please be advised that we do not handle any personal injury, medical malpractice or workman's compensation cases. We do not probate estates, and we do not handle traffic tickets. If you want the contact information for the lawyer referral in your county, please press 4. Otherwise, please call back between 9 am and 1 pm, Monday through Friday to speak with an Advocate. If you want to hear this message again, please press *.

WG790

VM Prompt:

Thank you for calling. All advocates are currently assisting other callers. After the tone please leave a message including your full name and telephone number. We ask that you spell your name and leave your telephone number twice for additional clarification. Someone will get back to you as soon as possible. If you are not a current client, do not leave a message, as we will not return the phone call. Thank you for calling.

WG791

Spanish VM Prompt:

We're sorry, but no one is available to take your call right now. You may either call back between the hours of 9am to 1pm, Monday through Friday, or you can leave a message at the sound of the tone. If you leave a message please tell us your name-- spell it-- and your phone number. Thank you.

MESSAGE FOR WHEN NO ONE IS AVAILABLE:

Unfortunately, no one is available to take your call right now. We apologize for the inconvenience. Please hang up and call back later. Or, you can go to our website, www.lasp.org, for further information or to see what types of cases that we handle.

SELF HELP:

To check the status of your open case, please enter the case number that you are calling about. This will be a 9 digit number that starts with 15. If you do not know your case number, please press 1 [go to VM message].

You entered [ ] If this is correct, please press 1, if it is not, please press 2 to reenter the number.

Please enter the last four digits of your social security number

You entered [ ] If this is correct, please press 1. If it is not, please press 2 to reenter the number. [I think we should only give them 3 tries at the SSN, and then go to the [if file does not exist] message.

[if file exists, but there is no status] The status is unknown. If you have any further questions about your case, and you wish to leave a message for your Advocate, please press 1. [go to VM Message]

VM Message (790?)

Thank you for calling Legal Aid of Southeastern Pennsylvania. If you are a current client of Legal Aid, please leave a message after the tone, and we will get back to you. Be sure to include your full name, and spell it slowly. We will also need your telephone number and the name of your Advocate or your Legal Aid file number. Remember, we are NOT the department of public welfare, we are LEGAL AID. If you are calling for your welfare caseworker, you have the wrong phone number.

This voice mail is for current clients of Legal Aid ONLY. If you are not a current client of Legal Aid, then please call our toll free number again between the hours of 9 and 1, Monday through Friday, and follow the prompts for an application for services. We will only return the calls of those who have case files open with Legal Aid of Southeastern Pennsylvania.

[if file exists and there is a status] STATUS. If you have any further questions about your case, and you wish to leave a message for your Advocate, please press 1. [go to VM Message]

[if the file does not exist]. I'm sorry, but we are unable to locate a file with the information you gave us. Please call our toll free number between 9 am and 1 pm, Monday through Friday, and follow the prompts for an application for services. [HANG UP]

This script should be used both on and off hours.

ShoreTel Training - Video Links:

Main URL for phone & communicator training:

http://training.shoretel.com/communicator/PhoneCourses.htm

200 Series (IP265):

http://training.shoretel.com/communicator/SagePhoneCourses.htm

400 series phones:

http://download.shoretel.com/400_phones/index.html

Personal Communicator:

http://training.shoretel.com/communicator/Communicator.htm

Shoretel Contact Center Supervisor User guide:

http://www.getadvanced.net/pdfs/ShoreTel-Enterprise-Contact-Center-8-Supervisor-User-Guide.pdf

Contact Center Agent User Guide:

http://www.getadvanced.net/pdfs/ShoreTel-Enterprise-Contact-Center-8-Agent-Toolbar-User-Guide.pdf

2014 HELPLINE SURVEY FOR GETTING THROUGH TO ADVOCATE RESPONSES

1 Did you have to call the Helpline more than once to speak to an Advocate?

YES	9	15%
NO	50	85%
	59	

2 Did you understand the questions that were asked in the recorded messages?

YES	53	91%
NO	5	9%
	58	

3 Did you use a cell phone?

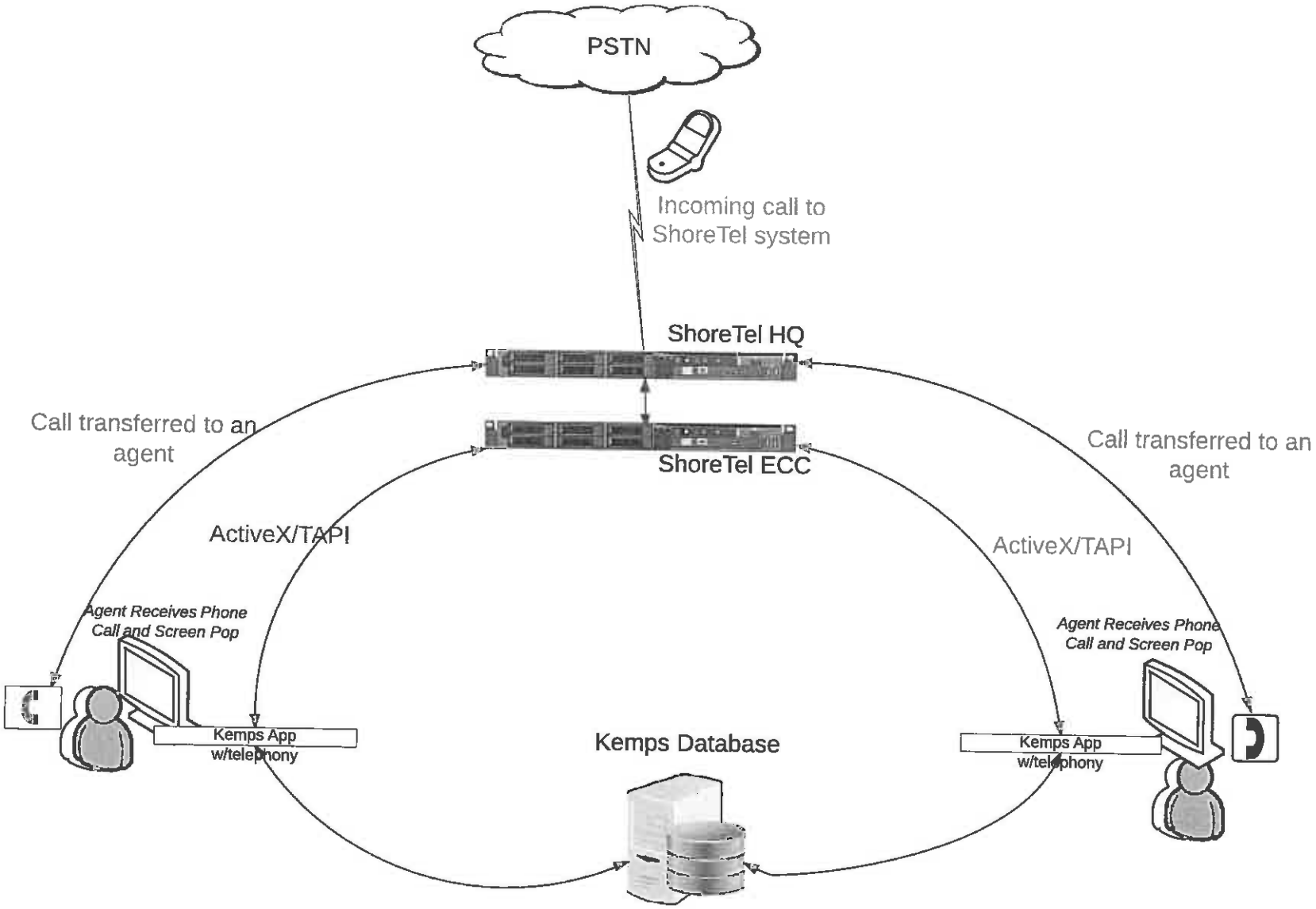
YES	39	70%
NO	17	30%
	56	

4 Were you satisfied with the Helpline phone system?

YES	42	91%
NO	4	9%
	46	

1A If yes, why did you call more than once?

disconnected
messages
didn't understand
took too much time entering my phone number
recorded messages
disconnected
too long
disconnected


PSTN
Incoming call to ShoreTel system
ShoreTel HQ
ShoreTel ECC
Call transferred to an agent
Call transferred to an agent
ActiveX/TAPI
ActiveX/TAPI
Agent Receives Phone Call and Screen Pop
Agent Receives Phone Call and Screen Pop
Kemps App w/telephony
Kemps App w/telephony
Kemps Database

OBJECTIVE 2 Texting Survey

We are in the process of upgrading our phone system and are looking at a number

Do you use texting?

YES	32	67%
NO	16	33%
	48	

Do you have a plan that gives you unlimited minutes?

YES	26	57%
NO	20	43%
	46	

If we could text you with information such as an appointment date, or a phone

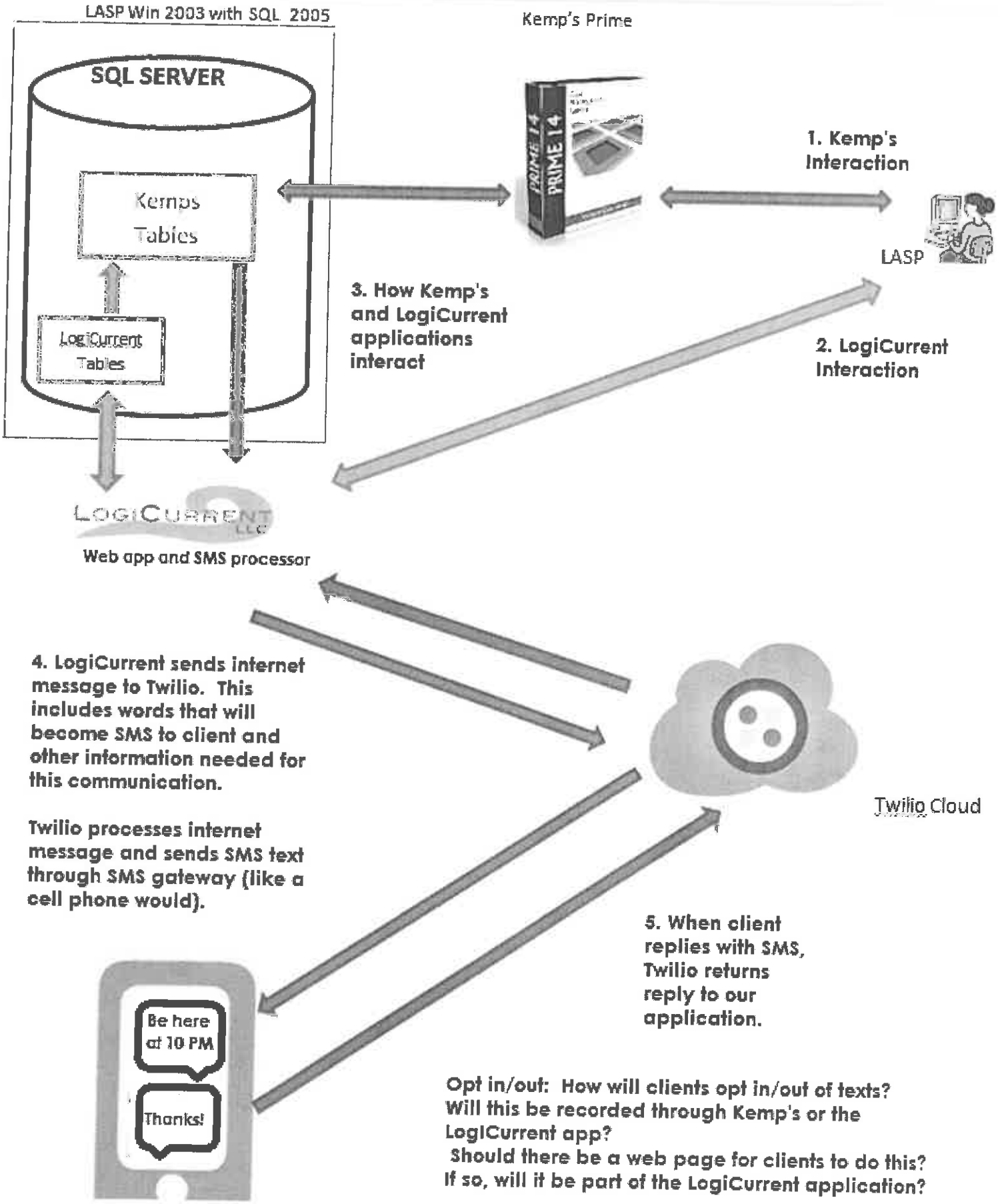
YES	27	69%
NO	12	31%
	39	

Would you prefer texting to a letter?

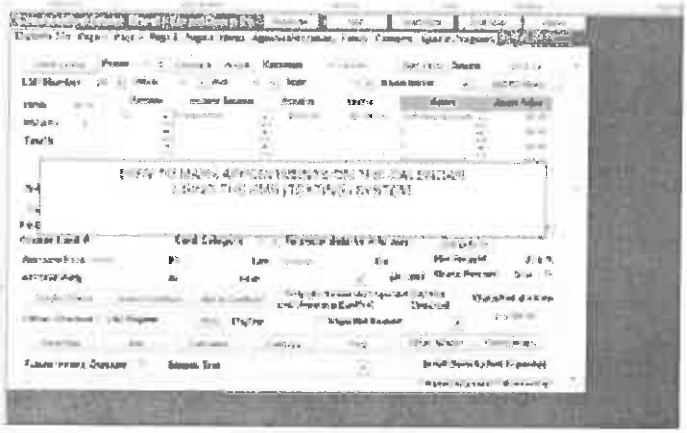
YES	19	49%
NO	20	51%
	39	

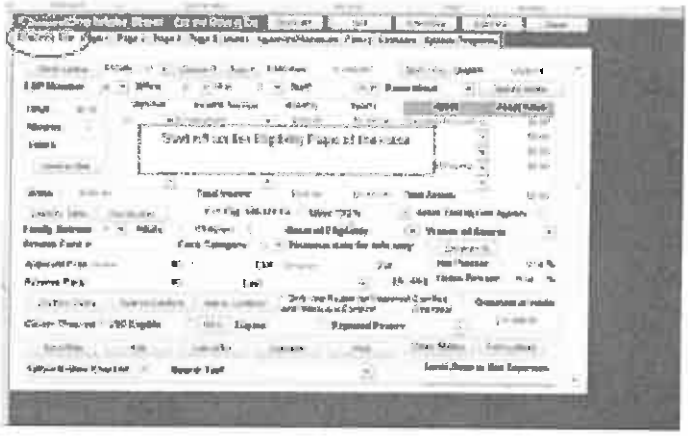
Would you prefer texting to a phone call?

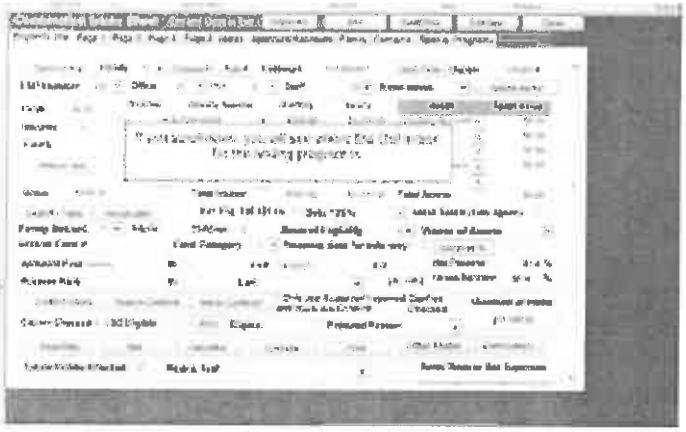
YES	16	40%
NO	24	60%
	40	

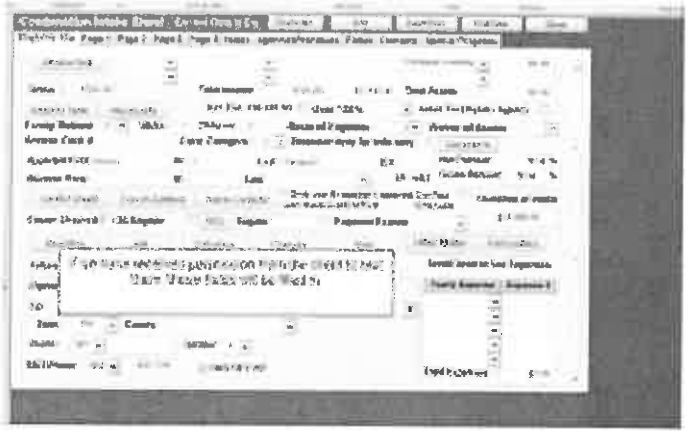

LASP Win 2003 with SQL 2005
SQL SERVER
Kemps Tables
LogiCurrent Tables
Kemp's Prime
PRIME 14
1. Kemp's Interaction
LASP
2. LogiCurrent Interaction
3. How Kemp's and LogiCurrent applications interact
LOGICURRENT LLC
Web app and SMS processor
4. LogiCurrent sends internet message to Twilio. This includes words that will become SMS to client and other information needed for this communication.
Twilio processes internet message and sends SMS text through SMS gateway (like a cell phone would).
Twilio Cloud
5. When client replies with SMS, Twilio returns reply to our application.
Be here at 10 PM
Thanks!
Opt in/out: How will clients opt in/out of texts? Will this be recorded through Kemp's or the LogiCurrent app?
Should there be a web page for clients to do this? If so, will it be part of the LogiCurrent application?

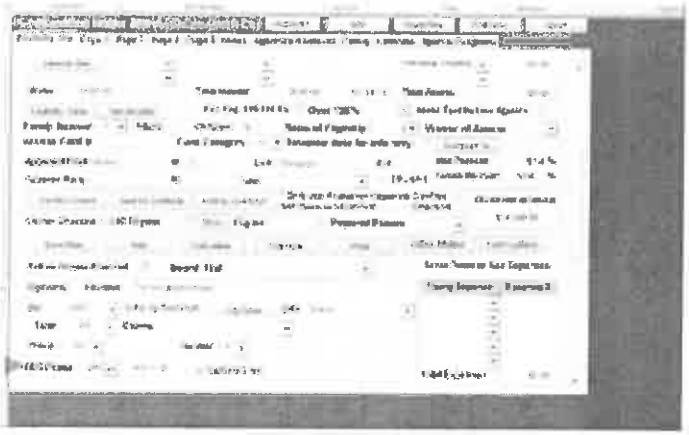
How To Set Up An Appointment

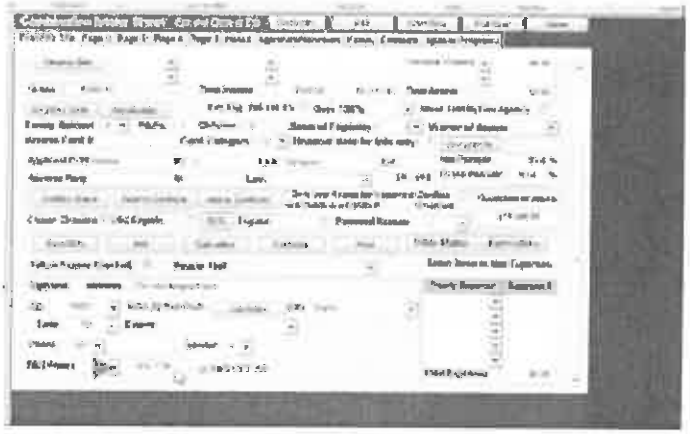


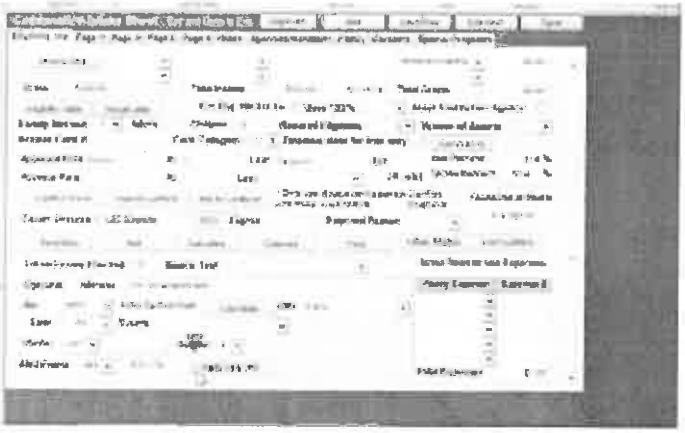


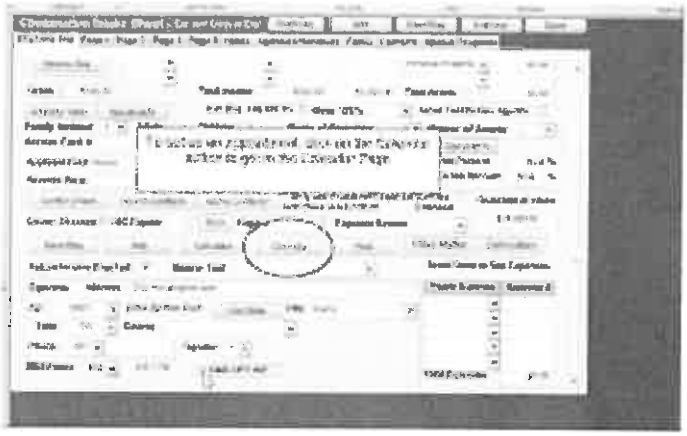






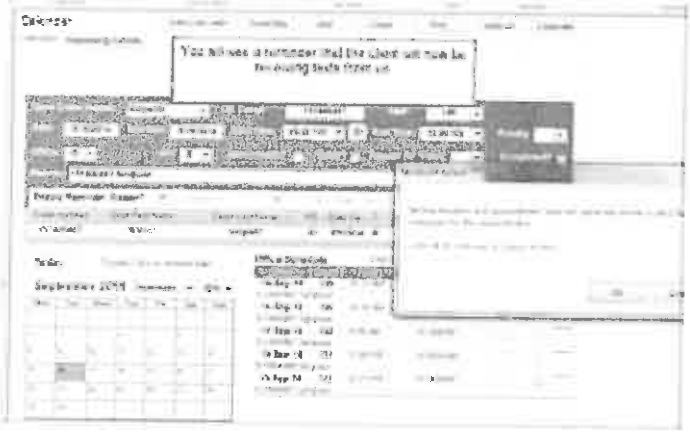


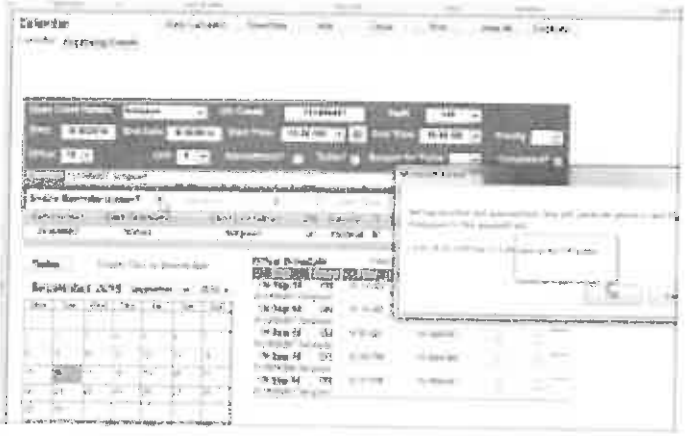




Calendar
This is the Calendar Page for this page.

Calendar


Calendar


Calendar

Choose the location from the drop down menu

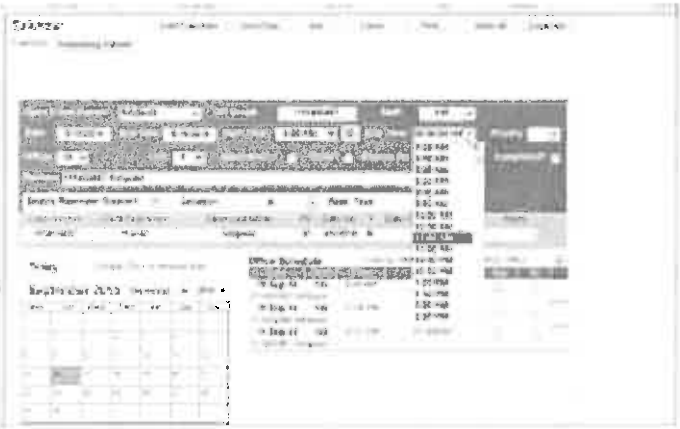
Choose the appointment type

Calendar
Change the date back to the date of the appointment and the time

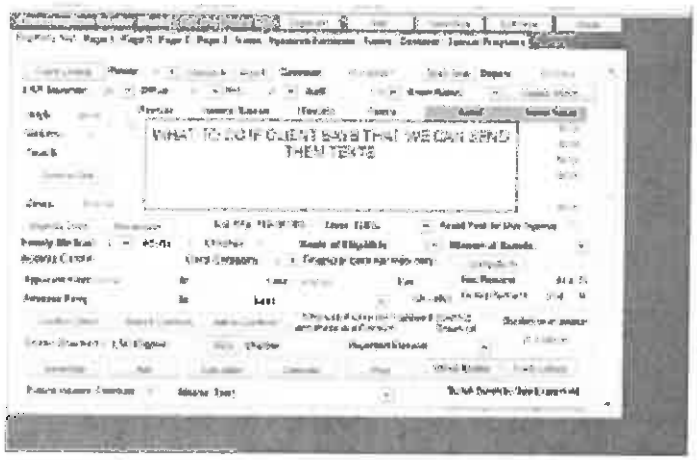
Calendar
Start here

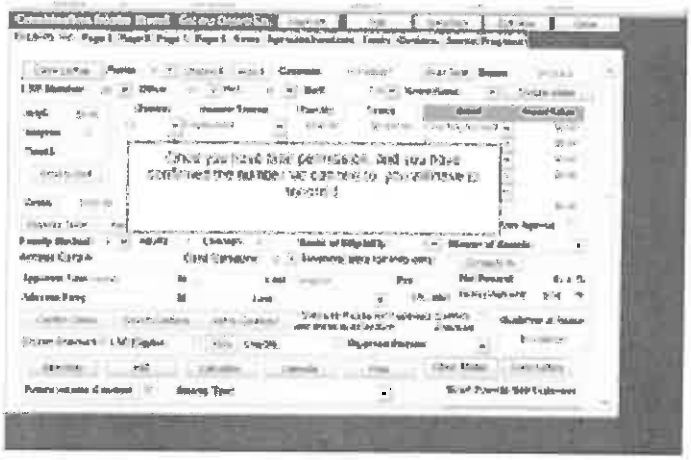
Calendar
Start here

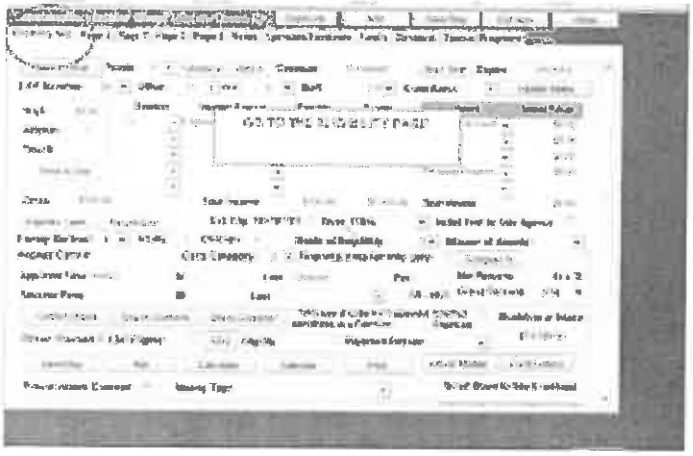
Calendar
Do the same with the evening and morning

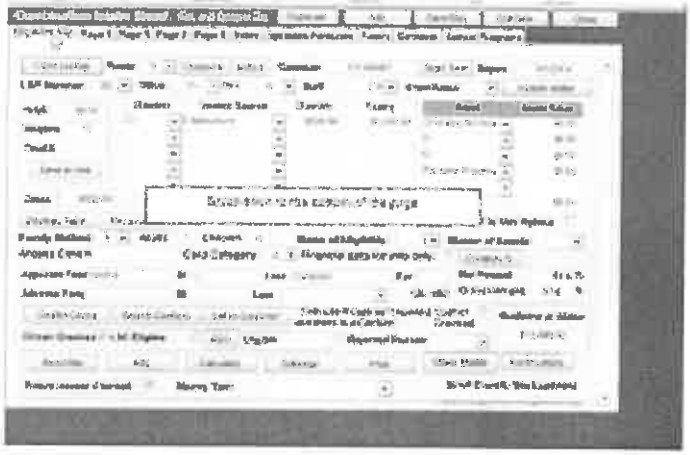


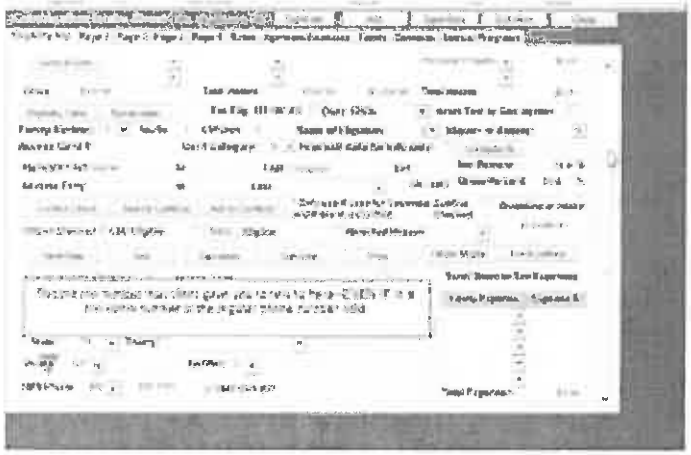
HOW TO RECORD PERMISSION

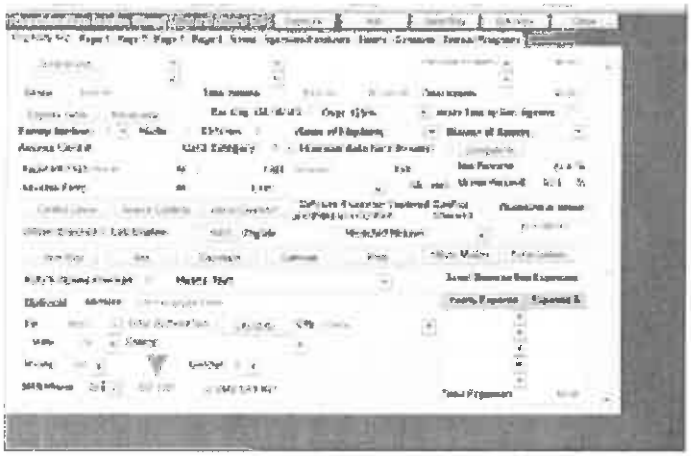


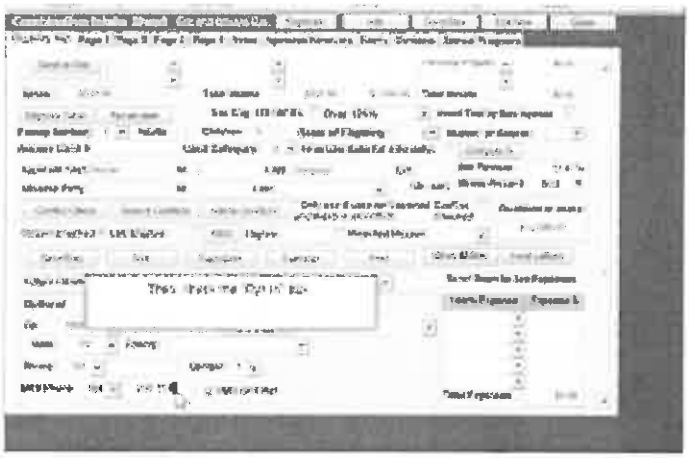


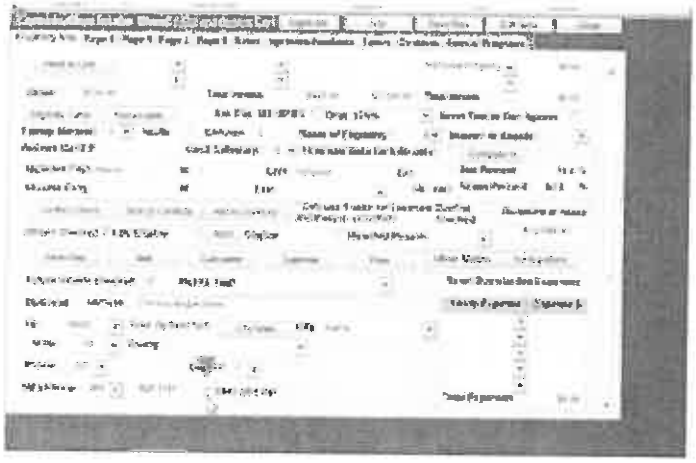


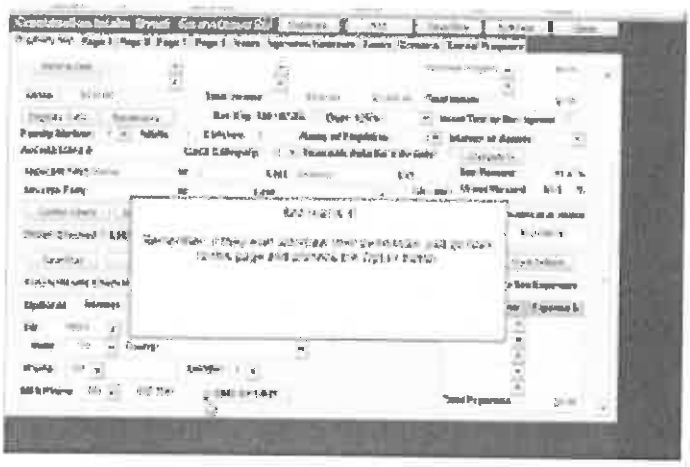












OBJECTIVE 3 Delaware County Attendance

DELCO	Invited	Came	No	
12/19/2014	7	4	3	
12/5/2014	6	4	2	
11/21/2014	10	7	3	
11/7/2014	9	3	6	
10/17/2014	12	7	5	
10/3/2014	12	5	7	
9/19/2014	17	10	7	
9/5/2014	13	7	6	
8/22/2014	15	5	10	
8/8/2014	13	5	8	
7/25/2014	13	8	5	
7/11/2014	13	8	5	
	140	73	67	52%

OBJECTIVE 3 CHESTER COUNTY ATTENDANCE

INFO	INVITED	CAME	NO	
6/5/2014	18	5	13	
7/3/2014	21	8	13	
8/14/2014	21	12	9	
9/4/2014	16	10	6	
10/2/2014	26	13	13	
11/6/2014	21	9	12	
12/4/2014	12	8	4	
	135	65	70	48%

FILING	INVITED	CAME	NO	
6/19/2014	5	2	3	
7/24/2014	3	2	1	
8/21/2014	13	3	10	
9/18/2014	7	4	3	
10/16/2014	9	5	4	
11/20/2014	1	1	0	
12/18/2014	11	4	7	
	49	21	28	43%