

Legal Aid Line

Legal Aid of Western Ohio, Inc.

Advocates for Basic Legal Equality, Inc.

A2J Online Intake

Presentation to:

LSC TIG Conference

Facilitated by:

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Cynthia Vaughn, Statewide Technology Project Manager, OLAF



Background

ABLE, LAWOW, Legal Aid Line

- Legal Aid of Western Ohio, Inc. (LAWO) and Advocates for Basic Legal Equality, Inc. (ABLE) are non-profit regional law firms that provide high quality legal assistance in civil matters to help eligible low-income individuals and groups in western Ohio achieve self reliance, and equal justice and economic opportunity.
- Legal Aid Line is a project of ABLE in partnership with LAWOW. Legal Aid Line provides intake and brief service to eligible online, walk-in, and telephone applicants.

Legal Aid Line Prior Intake System

- Walk-in
- Telephone
- Web-based



ABLE Legal Aid of Western Ohio, Inc. (LAWO) and Advocates for Basic Legal Equality, Inc. (ABLE) are non-profit regional law firms that provide high quality, legal assistance in civil matters to help eligible low-income individuals and groups in western Ohio achieve self reliance, economic opportunity and equal justice.

[About Us](#) | [ABLE Services](#) | [LAWO Services](#) | [Contact Us](#) | [Events](#) | [Resources](#) | [Office Locations](#)

NEWS

- [Perma-Fix settles complaint](#)
- [Board Member Mary Wiseman](#)
- ["New" Building in Toledo](#)
- [Family Justice Center](#)

GET INVOLVED

Support our ongoing efforts to bring equal justice to the low-income residents of western Ohio.

- [Donate](#)
- [Job Opportunities](#)
- [Volunteer](#)

[Immigrant Resource Guide Submission Form](#)

GET HELP

Access our intake system for free, high quality legal information, advice and referrals.

- [Apply for Help](#)

Legal Aid Line Prior Intake System

- Over 10,000 online applications in 2008
- Web makes up approximately 33% of all intake traffic

Legal Aid Line of Western Ohio

APPLY FOR HELP FROM LEGAL AID LINE OF WESTERN OHIO

In most cases, **Legal Aid Line** can provide service only to people who live in one of the following Ohio counties, or have a legal problem which must be resolved within one of these counties:

Allen	Darke	Hardin	Miami	Richland	Wood
Ashland	Defiance	Henry	Montgomery	Sandusky	Wyandot
Auglaize	Erie	Huron	Ottawa	Seneca	
Champaign	Fulton	Logan	Paulding	Shelby	
Clark	Greene	Lucas	Preble	VanWert	
Crawford	Hancock	Mercer	Putnam	Williams	

If you do not live in one of these counties, or do not have a case which must be resolved in one of these counties, then Legal Aid Line probably cannot assist you. To find legal services programs which serve Ohio counties other than the ones listed above, you call toll-free 1-866-LAW-OHIO or [click here](#).

If you do not wish to ask for help through this web site, you can call us at (419) 724-0460 in the Toledo area, or 1-888-534-1432 from elsewhere in Ohio or the United States.

If you ask for help by using this web site, we will make every effort to contact you at the phone number you give to us within two business days after we receive your request. If you do not hear from us within two business days, please contact us by phone or return to this web site to submit a new request for help.

WHAT COUNTY DO YOU LIVE IN?

Select County ▼

APPLY FOR HELP NOW

A2J Author[®] Online Intake TIG

- Legal Aid of Western Ohio, Inc. (LAWO) submitted a \$30,000 TIG application in 2007 in order to:
 - Provide the opportunity for all providers to “share” in the intellectual capital and investment made by Iowa and LSC;
 - Provide Ohio’s legal services providers with 24/7 online intake capabilities via a link through the LAWO website, as well as the Ohio Legal Services statewide website;
 - Provide people in need with the ability to contact legal aid at all hours of the day and night.

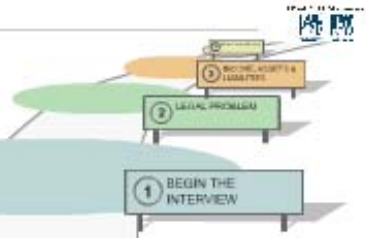



The “New” A2J Online Intake

Welcome! You can apply for help from Legal Aid Line of Western Ohio by answering the questions in this interview.

Click "**Begin**" to start.

Begin



 LEGAL AID LINE OF WESTERN OHIO

Legal Aid Line – A2J Intake Process Flow

- User goes to www.legalaidline.org and clicks “Apply for Help”



The screenshot shows the homepage of the Legal Aid Line website. At the top left are the logos for Advocates for Basic Legal Equality, Inc. (ABLE) and Legal Aid of Western Ohio, Inc. (LAWO). To the right is the slogan "Together, we do the community justice." Below this is a navigation bar with three buttons: "GET LEGAL HELP", "GET INFORMATION", and "GET INVOLVED". On the left side, there is a sidebar menu with links: "Home", "Online Access to Legal Aid Line", "Contact Legal Aid Line by Phone", "What Happens When You Call", "Legal Aid Q&A", and "Resources". The main content area is titled "Legal Aid Line" and contains text describing the service. A blue arrow points from the "Apply for Help" button in the sidebar to the "Legal Aid Line" text in the main content area. At the bottom right, there is a photo of a smiling woman wearing a headset, representing a staff member. Below the photo is a link for "Online access to Legal Aid Line".

ABLE
Advocates for Basic
Legal Equality, Inc.

LAWO
Legal Aid of
Western Ohio, Inc.

Together, we do the community justice.

GET LEGAL HELP GET INFORMATION GET INVOLVED

Home

Online Access to Legal Aid Line

Contact Legal Aid Line by Phone

What Happens When You Call

Legal Aid Q&A

Resources

GET LEGAL HELP

GET INFORMATION

GET INVOLVED

APPLY FOR HELP

DONATE ONLINE

Legal Aid Line

Legal Aid Line is an online and toll-free telephone application process for Advocates for Basic Legal Equality, Inc. (ABLE) and Legal Aid of Western Ohio, Inc. (LAWO).

Legal Aid Line staff provide FREE legal information, advice, and referrals to eligible low-income residents of northwest and west central Ohio. All callers are screened for income eligibility before receiving services.

Client services are provided by telephone. If ongoing legal representation is needed, eligible callers may be referred to another legal services office or volunteer attorney program.

Spanish speaking staff and assistance for the hearing and visually impaired are available. Interpreters for other languages are available on an as-needed basis.

Online access to Legal Aid Line

End of A2J Interview

- The user will see a screen with helpful information based on the legal problem they selected from the A2J interview and the county in which they live.
 - EXAMPLE: If the user has a Housing issue, then the ClientsWIN system will display county-specific emergency shelter information that the user can utilize while they are waiting for contact from legal aid.
 - The A2J problem code is mapped to ClientsWIN using Mambo (for the value of the problem code) .

“What happens next?”

- An e-mail is generated to a designated Intake Staff distribution list alerting staff an application has been submitted. E-mail contains name, address, phone, and date of birth of applicant;
- Online application is “held” in a “holding pen” until it can be reviewed by Intake Staff for conflicts utilizing a piece of code developed by the Ohio Legal Assistance Foundation (Ty Acker);
- At the conclusion of the conflict check, the case is either “Denied as Conflict” or “Accepted for Review”;
- Accepted eligible cases are assigned to LAL attorneys for review, and/or brief service, and/or referral to ABLE, LAWOW, or *pro bono* partners.

A2J Online Intake Statistics

- Went live August 31, 2009 at 8:57 a.m.
- August 31, 2009 – December 31, 2009:
 - 2770 web apps submitted
 - 1658 from rural counties
- Average time to attempt first contact with applicant:
 - 12-24 hours
- Rejections for conflict:
 - 167

Advantage of A2J Author[®] Intake

- Time Savings:
 - Intake process shortened by approximately 10-15 minutes per client.
 - HR Impact – Saved 0.5 to 1.0 FTE
 - A2J Intake available 24/7, which provides potential clients with a way to contact legal services outside of regular business hours; thus, potentially reducing the amount of call traffic (and waits on hold).



The “Mechanics” of A2J Online Intake

The “Script”

- The script from Iowa’s initiative was used as the starting point for the Ohio intake initiative.
- Modified as needed, with input from Legal Aid Line intake and attorney staff and ABLE and LAWEO attorneys.
- The script will be reviewed by all participating Ohio programs and will be edited based on the individual intake process for each program.

A2J Author[®] Intake – the Process

- User completes the interview.
- Information gathered from interview is passed to Legal Aid Line's Pika case management system by custom-written piece of code called a "transform" that converts `.anx` file to `.php` file.*
- Generated data file is "held" in Pika staging table for conflict review by LAL intake and advocate staff, prior to acceptance and transfer to the LAL Pika office.
- Transforms are, and should be, customizable by program based on elements (variables) in Pika, and are based on LSXML principles.

The Transform “Miracle” Happens Here

Saving Data | Access To Justice

<http://pika.olaf.org/ablelawo/a2j/A2JSetData.ph>

 Access To Justice

Saving Data

Acker's xml class

```
stdClass Object
(
  [CLIENTINTAKE] => Array
  (
    [0] => stdClass Object
    (
      [CLIENTIDENTIFICATION] => Array
      (
        [0] => stdClass Object
        (
          [CLIENTIDENTIFIER] => Array
          (
            [0] =>
          )
        )
        [PERSONINFORMATION] => Array
        (
          [0] => stdClass Object
          (
            [PERSONNAME] => Array
            (
              [0] => stdClass Object
              (
                [NAMEPREFIX] => Array
                (
                  [0] =>
                )
              )
            )
          )
        )
      )
    )
  )
)
```

Special Customizations for Legal Aid Line

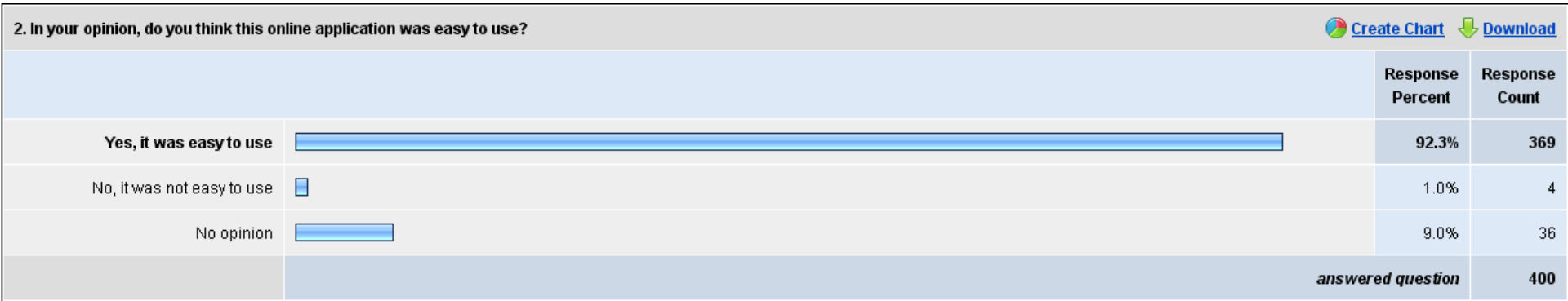
- Interview and transform are designed based on LAL's current intake practice.
- Pika fields had to be matched perfectly to ensure information from the interview "matched" with case management.
- Customized code to link the ClientsWIN (problem-code specific information) system had to be captured appropriately and transferred (from Mambo).

Other Important Considerations

- Every program's interview, Pika system, and intake process will be different, so it is important to *identify requirements first* using a Word document as the 'blueprint'.
- Even after your first A2J interview iteration is done, you can expect to have several "tweaks" to it before you are ready to ask for the transform code work to be done.
- What you see in the Legal Aid Line interview is customized to the program's current practice, so whatever you want your interview to do can be (most likely) done for your program interview.

A2J Online Intake - Reporting

- Crystal Reports is utilized to track activity
- Surveys
 - Public (currently running SurveyMonkey)
 - 400 surveys completed to-date with over 90% saying interview is easy.



Continuous Development

- It is “normal” to expect that there will be more changes to both the Legal Aid Line interview and Pika as the system is used, (and based on user feedback.)
- Next phase of development is already underway (using Basecamp).

[Go back to LAWO A2J Online Intake Interview - Phase II Development](#) (Share this Writeboard using [http](#))

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Wishlist for Phase II Development

From Ed Marks:

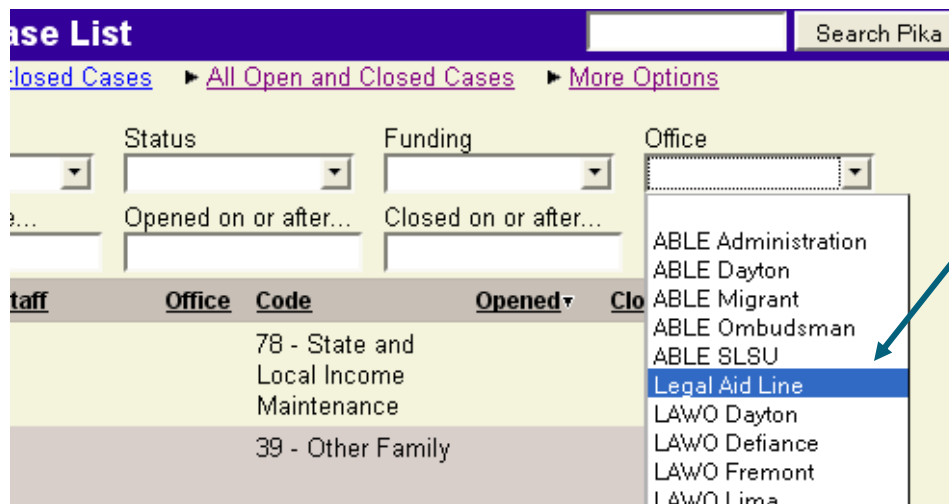
1. Ability to email a supervisor with conflict check review for an incoming case.
2. If not already done, FOR HOLDING PEN, please insert date of birth into Pika (both if it was provided and/or if SS# was not provided).



The Pika Piece

Testing A2J Interview Data Transfer to Holding Pen in Pika

- Go to http://pika.olaf.org/ablelawo/case_list.php?mode=all
- Username: amworley
Password: P1k@
- Click on “More Options”, and then search for Legal Aid Line from the “Office” pull-down on the screen.



The screenshot shows the 'Case List' interface in Pika. At the top, there is a search bar labeled 'Search Pika'. Below it, there are navigation links: 'Closed Cases', 'All Open and Closed Cases', and 'More Options'. The 'More Options' link is highlighted. Below the navigation links, there are several search filters: 'Status', 'Funding', 'Office', 'Opened on or after...', and 'Closed on or after...'. The 'Office' dropdown menu is open, showing a list of options: 'ABLE Administration', 'ABLE Dayton', 'ABLE Migrant', 'ABLE Ombudsman', 'ABLE SLSU', 'Legal Aid Line', 'LAWO Dayton', 'LAWO Defiance', 'LAWO Fremont', and 'LAWO Lima'. The 'Legal Aid Line' option is highlighted in blue. A blue arrow points from the 'Legal Aid Line' option in the dropdown menu to the 'More Options' link in the navigation bar.

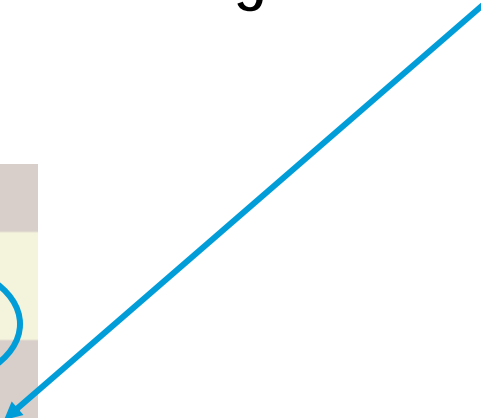
Staff	Office	Code	Opened	Clo
		78 - State and Local Income Maintenance		
		39 - Other Family		

Testing A2J Interview

Data Transfer to Holding Pen in Pika (continued)

- Scroll down to the list of cases displayed and then go to the last page of the cases

<i>III</i>	Aid Line		
Not-Assigned, <i>III</i>	Legal Aid Line	077	7/26/2006
Not-Assigned, <i>III</i>	Legal Aid Line		7/26/2006
1 2 3 4 5 6 7 8 9 10 ... 24			
1168 cases found			



Testing A2J Interview

Data Transfer to Holding Pen in Pika (continued)

- Select your case from the list

Pika Home > Cases > Current Case List Search F

Case List Mode: [My Open Cases](#) [My Closed Cases](#) [All Open and Closed Cases](#) [More Options](#)

Show... Open Closed All

Client Name Counsel Status Funding Office Legal Aid Line

Opened before... Closed before... Opened on or after... Closed on or after...

Case Number	Client Name	Status	Staff	Office	Code	Opened	Closed	Funding	Time
LAL-09-43892 Open	Test, My Third	Hold	Not-Assigned, ZZZ	Legal Aid Line		2/24/2009			
LAL-09-43894 Open	Johnson, Thomas B	Hold	Not-Assigned, ZZZ	Legal Aid Line		2/24/2009			
LAL-09-43896 Open	CV, A Program Test A	Hold	Not-Assigned, ZZZ	Legal Aid Line		2/24/2009			

Testing A2J Interview

Data Transfer to Holding Pen in Pika (continued)

- You will see the case being held in the holding pen from the conflict check screen.

[Pika Home](#) > [Case List](#) > LAL-09-43927

 Search Pika

This case is in the Holding Pen.

Clients for LAL-09-43927

Susan Lois Smith
SSN: 555-55-5555
555 Main Street

Columbus, OHIO 44444
Phone: (614) 555-5555
Primary Phone Before 12:00 noon

Edward Smith
SSN: 222-22-2222
555 Main Street

Columbus, OHIO 44444
Phone: (614) 555-5555

Opposing Parties for LAL-09-43927

Mean Guy
SSN:
222 South Street

Columbus, OH 44444
Phone: ()

ADDRESS BOOK MATCHES & CONFLICT CHECKING

CLIENTS:

Susan Lois Smith

SSN Matches

OPPOSING PARTIES:

Mean Guy

SSN Matches

Testing A2J Interview

Data Transfer to Holding Pen in Pika (continued)

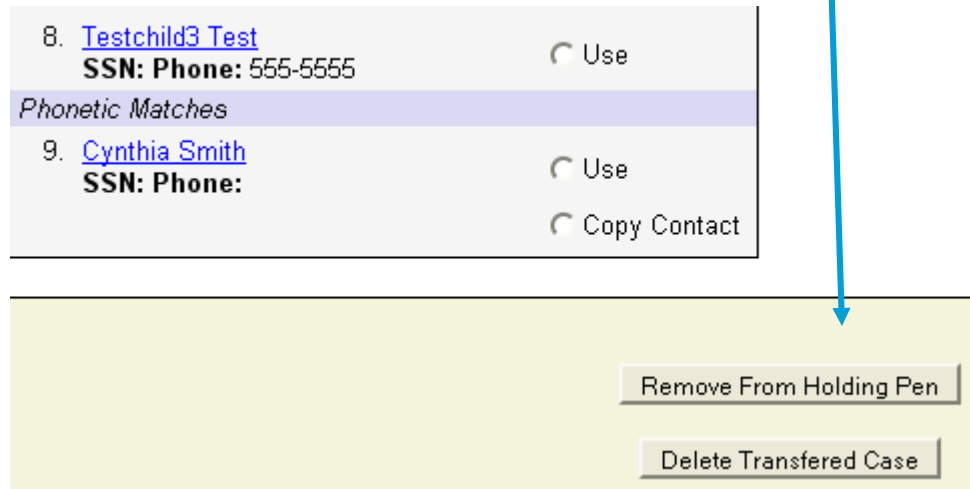
- Review the conflict check information; you must click at least one radio button from each section in order to move on.
- Information on this screen is used to review for conflict checks but is not a complete stop gap for all potential conflicts; intake staff must still use their own assessment skills in determining if there is an actual potential conflict.

ADDRESS BOOK MATCHES & CONFLICT CHECKING	
CLIENTS:	OPPOSING PARTIES:
Susan Lois Smith	Mean Guy
<i>SSN Matches</i>	<i>SSN Matches</i>
1. A Program Test CV SSN: 555-55-5555 Phone: 222-2222 <input type="radio"/> Use	<i>Phone Matches</i>
2. John Doe SSN: 555-55-5555 Phone: 555-1212 <input type="radio"/> Use	<i>Phonetic Matches</i>
<i>Phone Matches</i>	1. Mean Guy <input type="radio"/> Use
3. AProgramTestDMJ DMJ SSN: Phone: 555-5555 <input type="radio"/> Use	SSN: Phone: <input type="radio"/> Copy Contact
4. Testadult1 Test SSN: Phone: 555-5555 <input type="radio"/> Use	

Testing A2J Interview

Data Transfer to Holding Pen in Pika (continued)

- Once you have made your selections, you can click “Remove from Holding Pen” or “Delete Transferred Case”; data is released to the Legal Aid Line office.



8. Testchild3 Test	<input type="radio"/> Use
<i>Phonetic Matches</i>	
9. Cynthia Smith	<input type="radio"/> Use
	<input type="radio"/> Copy Contact

Testing A2J Interview

Data Transfer to Holding Pen in Pika (continued)

- Information from the interview is now in Pika and can be transferred to the appropriate office within the LAWO program.

Pika Home > Cases > LAL-09-43925

Citizenship Status is Blank Funding Code is Blank Income Info is Blank LSC Problem Code is

Case Summary

Hold

[Notes](#) [Conflict](#) [Assets](#) [Liabilities](#) [Schedu](#)
[VAWA](#) [ProBono](#) [Lit.](#) [Compen](#)

Administrative Information

Case Number: LAL-09-43925	Primary Counsel: Not-Assigned, ZZZ
Case Status: Hold	Co-counsel #1:
Disposition: 	Co-counsel #2:
Date Disposition Determined: 	Undup. Service:
Date File Opened: 3/2/2009	LSC-CSR <input checked="" type="checkbox"/>
Office: Legal Aid Line	OLAF-CSR <input checked="" type="checkbox"/>
	Other <input checked="" type="checkbox"/>

Program Test SR SR Testy
Primary Client
Security Risk? No
Address:
5 Main Drag
Lima, OHIO 45806
Phone: **(419)**
123-4567 Primary
Phone Anytime
Notes:
Language: **English**
Birth Date: **3/23/1983**

Project Management and Estimated Hours

TO SUMMARIZE: The estimates below are based on experience of the LAWO implementation. An estimated new project budget could look like this:

- Project Management: 80-100 hours (all phases of the project)
- Inception Phase: A2J Training (NTAP and Chicago Kent): 8 hours
- Elaboration Phase: Staff stakeholder review and development of script: 40 hours (assumes staff time can be billed for the project – may need more time)
- Construction Phase: A2J / HotDocs Template Development: 20-40 hours for initial development plus 10 hours for edits
- Construction Phase: Transform Code with CALI (John): 8 hours
- Construction Phase: Case Management Integration: 10-20 hours for integration (could vary greatly – this would be a place to add hours to cover technology integration costs)
- Transition Phase: Testing and Tweaking: 10 hours
- Transition Phase: LSC Reporting over the life of the grant and including the final evaluation report: 8 hours

Total Estimated Hours: Low end estimate 184 hours

Questions?

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