**TIG FINAL EVALUATION REPORT**

**Montana Mobile Enhancement Project**

**Grantee Name:**     Montana Legal Services Association
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## I.     PROJECT GOALS AND OBJECTIVES

The project goal was to build out a system-wide mobile interface enhancement to allow low-income Montanans to easily, efficiently, and effectively apply for MLSA's services, and access civil legal information to resolve their civil legal needs.

The project had five objectives:

1.  Add SMS texting capacity to the LegalServer case management system, including integrations with cases and calendaring to improve client centered communications.
2.  Build out a new mobile online intake system, with a new mobile interface to better streamline the intake system and improve the efficiency of services to clients.
3.  Enhance the mobile functionality of MLSA's free legal help site MontanaLawHelp.org, including the addition of text messaging capacity, to provide better mobile navigation and retrieval of legal information for clients on mobile devices.
4.  Build-out of technology to push and pull data to and from clients, using the case management system and optional mobile interface to better streamline the intake system and improve the efficiency of services to clients.
5.  Conduct outreach and publicity to increase the availability and use of mobile intake system and mobile/texting communication options.

No changes were made in the goal during the implementation of the project.

## II.     EVALUATION DATA AND METHODOLOGIES

Kelly Carmody, an independent evaluator, led the project assessment. She provided feedback that included suggested changes to the survey of applicants who use the online application, the staff texting guide, outreach, and other communications. These changes were made as suggested. Other evaluation methods used included the following:

**Surveys.** Three online surveys were conducted, with one continuing as part of MLSA's on-going evaluation process.

- **Applicants for MLSA's services** who submit an online application are asked in an e-mail confirming the receipt of their application, to complete a five-question survey about the online application. This survey was launched on July 13, 2017. The 40 clients who submitted an online application

prior to July 13<sup>th</sup> were e-mailed a link to the survey and asked to complete the survey.[1] As of December 5<sup>th</sup>, a total of 57 surveys have been submitted. Data will continue to be collected, analyzed and addressed as these surveys come in.

- **MLSA staff** were asked to complete an 18-question online survey with questions that addressed all five project objectives. Twenty-five staff, including 11 attorneys, three other advocacy staff, seven community engagement staff (including those who conduct intake), and four administrative staff completed the survey.
- **MLSA partner organizations** were asked to complete a 10-question online survey with questions that addressed all five project objectives. Twenty-eight individuals completed the survey, including 18 who work for organizations that provide services to victims of domestic violence, nine who work with Court Help (self-help law centers in Montana courthouses), and one individual who works with a Head Start organization.

**Interviews.** Interviews were conducted of Tracie Poindexter, MLSA's Program Administrator who was the project director for this TIG; Alex Clark, MLSA's Community Outreach Assistant; and Samuel Halpert, the former LawHelp Coordinator at ProBonoNet who worked on this project. Leah Brach, the Customer Support Specialist with LegalServer who worked on this project, answered questions via e-mail.

**Quantitative Data.** The quantitative data that was collected and analyzed included the following:
- case management data
  - SMS text messages sent and received by and from LegalServer to clients
  - online intake forms completed (The plan was to collect the number of mobile online intake forms completed, but the data available does not distinguish mobile from other online intake forms.)
  - data requests pushed to clients
  - data requests pulled from clients
  - clinic appointments
- MontanaLawHelp.org statistics via Google Analytics
- a comparison of the average time it takes for exchange of intake and case information before a client's case is moved forward when using the mobile/texting enhancements versus using the traditional modes of communication and data exchange

## III.    SUMMARY OF MAJOR ACCOMPLISHMENTS, RECOMMENDATIONS AND FUTURE STEPS

MLSA achieved its goal to build out a system-wide mobile interface enhancement to allow low-income Montanans to easily, efficiently, and effectively apply for MLSA's services, and access civil legal information to resolve their civil legal needs. The technological developments that are major accomplishments of this project include these enhancements:

1. MLSA can now send text messages to its clients from its case management system, LegalServer, and receive texts from clients into LegalServer. Advocacy and intake staff can now send short text messages to confirm and remind clients of upcoming appointments, request copies of documents or completion of digital forms, provide links to information such as that on MontanaLawHelp.org, and inform them of significant events happening in their case.

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[1] Only accepted clients, some applicants were not e-mailed the survey link because MLSA did not have the e-mail addresses for the applicants who were ineligible or not referred. This could have affected the responses since accepted clients may rate the application process differently than non-accepted applicants.

2. MLSA built out a new mobile online intake system to better streamline the intake system and improve the efficiency of services to clients. Mobile device users have increased accessibility and applicants find the new system easy to use.

3. ProBono.net's mobile responsive platform for lawhelp.org websites has been enhanced for mobile device users and laptop/desktop users. This optimizes this self-help resource for all low-income persons regardless of how they access the internet. The users of MontanaLawHelp.org have increased by 53 percent from the year before the changes to the year after ProBono.net made its initial changes.

4. MLSA can now send digital forms to applicants and clients. These digital forms allow applicants and clients to complete a form electronically by clicking on a link in a text or e-mail message. The forms, which are built into MLSA's case management system, LegalServer, are stored as a document in the client's case file when the client completes it. This has significantly decreased the time to receive forms and increased the efficiency of MLSA's referrals and assistance.

MLSA's recommendations for further development, adaptation or use of the technology developed through the project include the following:

1. The new texting feature could be enhanced by development of the ability to pull client information from LegalServer into texts so some text messages can be completely automated. This would increase efficiency in many instances, especially for appointment confirmations and reminders.

2. MLSA's online intake's disclaimers are multiple screens before an applicant can begin to give their information. Developing a more succinct way to convey the needed information may increase the number of applicants who complete an application.

3. LegalServer's digital forms feature could be enhanced by development of the ability for LegalServer to send an e-mail to notify a designated staff person(s) when a text or digital form is sent or received between LegalServer and a client. The development of additional forms would help all users of LegalServer who want to use digital forms.

## IV.    IN-DEPTH ANALYSIS OF ACCOMPLISHMENTS

MLSA achieved its goal to build out a system-wide mobile interface enhancement to allow low-income Montanans to easily, efficiently, and effectively apply for MLSA's services, and access civil legal information to resolve their civil legal needs. Like all technology, it is a work in progress that will be continually evaluated, analyzed and improved. The accomplishments are many:

**Objective 1:    Add SMS texting capacity to the LegalServer case management system, including integrations with cases and calendaring to improve client centered communications.**

This objective has been successfully achieved. MLSA contracted with PS Technologies, Inc. (PSTI) to build out enhancements that allow MLSA to send text messages to its clients from Legal Server and receive texts from clients into LegalServer. Advocacy and intake staff can now send short text messages to confirm and remind clients of upcoming appointments, request copies of documents or completion of

digital forms, provide links to information such as that on MontanaLawHelp.org, and inform them of significant events happening in their case.

**Testing and Feedback**

Fourteen staff members tested the texting feature in LegalServer. These staff were selected specifically because they will use these features most often to schedule appointments with clients for them to complete intakes, have advice calls with MLSA attorneys or attend local pro bono clinics. Comprehensive internal testing was conducted between late January and the end of June, 2 [GR1]by the testers texting through LegalServer to arrange times to speak with applicants/clients, and scheduling the automatic sending of text reminders from LegalServer for upcoming advice appointments.

During testing, 757 SMS text messages were sent to clients who chose to attend pro se clinics and agreed to receive text message reminders. A client reported he had not received the text reminder. This uncovered an issue where some of the text messages in the queue were not being sent as scheduled. PSTI worked with the project director and fixed the issue. No other issues were identified.

**Accomplishments and Outcomes**

1. **Use of SMS text messages.** From mid-January to mid-October, 2017, a total of 1,363 texts were sent to clients, and 420 were received from clients. A sample of 686 text messages sent during March – June 2017 were reviewed. Approximately 85 percent were appointment reminders. The remaining 15 percent were text messages used to send links to forms and websites, attorney contact information, and similar information. The number of texts in this second category was increasing in May and June, which may indicate staff becoming used to the idea that texts could be used for more than appointment reminders. The staff survey respondents' answers summarized below seem to confirm this.

2. **More efficient communication.** Intake staff and advocacy staff now use this new feature to send clients text messages for the following purposes:
   - notification to set up a time to finish an application
   - notification of callback advice appointments
   - appointment reminders
   - letting applicant/client know they are trying to contact them
   - links to digital forms to complete
   - link to MontanaLawHelp.org and/or court forms
   - quick questions
   - court deadline reminders
   - brief advice and instructions to clients with emergency problems

   This has reduced the staff time needed formerly to make telephone calls or send mail for these purposes. Examples include the following:

   ➢ **Reduced time to set up appointments.** All but one staff survey respondent said that the ability to text applicants and clients reduced the time needed to set up appointments. The attorney who has not seen a reduction works with Native Americans on reservations where texting is less of an option because cell phone service is unavailable or less reliable.

> - **Reduced time spent trying to contact clients.** Eleven staff survey respondents reported they spend less time trying to contact clients when they use texts, than when they used the other methods of communication.
> - **Reduced time to gather case data.** Four staff survey respondents have found texting has reduced the time needed to gather data for their cases.

3. **Increased number of appointments kept.** Data from two family law clinics was reviewed to see the effect texting may have on clients keeping their appointments with MLSA. The clients scheduled for the sampled 2016 clinics were usually notified by telephone of their appointment date. The client may have also received an e-mail or letter with confirmation of the appointment once the appointment was set, and then would get a reminder phone call and/or e-mail a day or two before the clinic.

The clients scheduled for the sampled 2017 clinics received a text on the same day they completed their application over the phone with MLSA intake staff. The text confirmed their clinic appointment. They also received a reminder text the day before the appointment. Table 1 shows a marked increase in kept appointments when texts were used. One clinic's kept appointments increased by more than half and the other doubled.

| TABLE 1: Appointments Kept by Clinic Clients | | | |
|---|---|---|---|
| Clinic | Pre and Post SMS Text Time Periods | Appointment Kept by Scheduled Clients | |
| | | # | % |
| | | | |
| Missoula County Clinic | July 2016 | 5 of 10 | 50% |
| | September 2017* | 11 of 14 | 78.5% |
| | | | |
| Gallatin Legal Advice Clinic | August & September 2016 | 5 of 13 | 38.5% |
| | June & September 2017* | 14 of 18 | 77.8% |

*Clinics held nearest the dates of the 2017 clinics were compared.

Some of the respondents to the staff survey also commented that the appointment notifications and reminders have reduced the number of missed appointments.

4. **Improved compliance with document requests.** Six MLSA advocacy staff reported on the survey that texting has improved clients submitting documents needed by MLSA.

5. **Staff instructions for new and continued reference**. MLSA developed a MLSA User Guide, *Texting with LegalServer*, which is a PowerPoint used for in-person and online training of staff and is posted on MLSA's intranet as a reference for questions. The Guide contains screen shots with explanations and instructions for each step and sample texts for common text messages to clients. All staff were trained, using the Guide, in January and February, 2017. New staff are trained on texting through LegalServer when they start employment with MLSA.

**Objective 2: Build out a new mobile online intake system, with a new mobile interface to better streamline the intake system and improve the efficiency of services to clients.**

This objective has been successfully achieved. MLSA contracted with PSTI to build, with MLSA, a mobile friendly online application using LegalServer as the platform. This improvement, which launched in June,

2017 allows applicants to access MLSA's intake process directly from their cell phone or tablet as well as a desktop or laptop computer.

**Testing and Feedback**

Twelve MLSA staff members tested the online intake, provided feedback and identified issues before the June launch. Changes were made in the application's language to make it clearer and in the steps to make the process more efficient for applicants and MLSA.

In October, 2017, further testing was done by ten new Justice for Montanans AmeriCorps staff. They had about a month of experience at MLSA, which may have given them a good balance between not knowing *too* much about MLSA and knowing enough to provide useful feedback. They compared the old online application process with the new online application process. Some completed the applications on a desktop or laptop computer and some used their cell phone. They gave valuable feedback, including suggestions about how to phrase questions about disability, gender and language.

One comment about the new application is thought-provoking about the effectiveness of making legal websites more user friendly through the use of graphics and other features that are more like a game, such as MLSA's former online application—an interactive A2J application: *"The new form looks more official. The old form is like an interactive game similar to something I think would be used in school. I probably wouldn't trust an organization that asked me to fill out a form like that, especially with a legal problem. The new form looks like it is connected to a law firm and seems more professional and serious to me."*

The collection of applicant feedback began July 13, 2017. Between then and December 5, 2017, 57 applicants completed an online survey after they received the link to the survey in an e-mail they received confirming the receipt of their application or a follow-up e-mail—see Footnote 1. The findings are noted in the next section.

**Accomplishments and Outcomes**

1. **Easy to use and satisfied applicants.** Ninety-five percent of the applicant survey respondents found the new online intake easy to use. When asked, *Overall, were you satisfied with the online intake proce*ss, three-fourths of the respondents said they were *extremely satisfied* and another one-fifth were *somewhat satisfied* for a total of 93 percent extremely or somewhat satisfied.

2. **Increased accessibility for mobile device users.** MLSA's former online intake was not user friendly for mobile device users. The new online intake changes the size and design of the application to fit the user's device. This increases accessibility for applicants who use their mobile phone or notebook.

   The total number of online applications increased by 38 percent during the first four months of the new online application (June 6 – October 11, 2017) when compared to the same time period in 2016. This increase in online applications was more than a third higher than the 27 percent increase in applications from all sources during this time. MLSA does not ask what type of device an individual uses to complete their application, so it cannot confirm whether this significant increase is due to more mobile users or desktop/laptop users applying online.

3. **More plain language.**  MLSA has revised and revised again the language used by the online intake system to make it as clear as possible, using as much plain language as possible.

4. **More efficient and convenient scheduling.** At the end of the online application, the applicant is given a choice of waiting for HelpLine staff to call them back to complete the application or scheduling an appointment time online. If they choose to schedule a time online, a calendar shows available appointments for the next ten business days. If the available times do not work for them, they are asked to call the HelpLine. This scheduling option gives increased efficiency for both MLSA and the applicant, and can give the client increased choices of appointment times. (Note that if the appointment slots are all filled, the applicant is not given this choice, and is told that Helpline will call him/her.)

5. **Improved service for victims of crime.**  When MLSA has adequate staffing, victims of crime are given a direct link to the Victims' Rights Navigator, who will complete their application with them. This creates time efficiencies for MLSA, the case workers in Victim Legal Assistance and Elder Law programs and the applicants who are victims of crime. It also gives specialized expertise and service to one of MLSA's most vulnerable client populations.

6. **Less need for IT support.**  MLSA's previous online application used A2J and Hot docs. It was difficult for MLSA to find someone to support these apps.  The new online intake uses a simpler language. The Project Director was taught the language and can now support it.

**Objective 3:  Enhance the mobile functionality of MLSA's free legal help site MontanaLawHelp.org, including the addition of text messaging capacity, to provide better mobile navigation and retrieval of legal information for clients on mobile devices.**

This objective has been successfully achieved. MLSA contracted with Probono.net (PBN) to enhance the mobile functionality of MontanaLawHelp.org.  Formerly, MontanaLawHelp.org had two mirror sites—one for desktop/laptop computers and one for mobile devices. At the time MLSA contracted with PBN, PBN had developed a single mobile responsive platform, enabling MLSA and all users of the LawHelp platform to have one platform that works for users of all types of computers and devices. It automatically scales itself to fit within the screen dimensions of each visitor's device. As the screen reduces in size, the subtopic links disappear making it easier to read, and the logo at the top of the screen drops out so the visitor can see more information. Further feature enhancements for mobile use also were made under this project.

In addition, PBN modified the platform so visitors can "subscribe" to receive text alerts from MontanaLawHelp.org with information about legal education, upcoming events and referral services. The modifications to the Application Program Interface (API) made it compatible with Frontline SMS and Twilio, the selected SMS platforms. Twilio sends texts to specific phone number(s) that FrontLine SMS passes to it. Twilio also receives text messages that it can pass on to Frontline SMS. PBN created a short user guide to help set up the SMS texting capabilities. The user guide, entitled "Setting Up SMS Subscriptions on LawHelp" is included as Attachment 1. When MLSA's free subscription to Frontline expired, MLSA decided to suspend the text alerts from MontanaLawHelp.org. The small number of individuals (22 total) who have signed up for the texts and the limited content available (the Legal Tip of the Week) does not justify the subscription fee at this time.

**Testing and Feedback**

PBN had an independent evaluator, Rachel Crawford, a UX consultant, conduct an audit of the website. She provided feedback on the site design and suggestions for design improvements. Her suggestions were tested by two groups, (1) "power users" who had extensive experience using technology and the internet, and (2) clients at an advice clinic who may not have had extensive experience using technology. The two groups were shown "before" and "after" screenshots of web pages and asked which they preferred. Overall, the testers preferred the "after" screenshots that were the modified versions of MontanaLawHelp.org with the consultant's suggested improvements. The modifications were made by PBN, which delayed the completion of this objective by a month. However, the delay was well worth it for MLSA and the other users of PBN's platform. The code changes made the platform more user friendly and will make future code changes easier.

Seven MLSA staff members tested the SMS texting feature on MontanaLawHelp.org. No issues were identified during this testing. After the launch, 15 users tested this feature by signing up to subscribe to a topic and receive a text message. No problems were reported.

**Accomplishments and Outcomes**

1. **Mobile responsive lawhelp.org platform.** The mobile responsive platform is now available for all of the approximately two dozen states and territories that use the lawhelp.org platform. The features that PBN developed for MLSA are available with "no assembly required," which is a major advantage. The website administrators do not have to take any action to add these new features. They are immediately available. The code changing that was done by PBN will make this true for future new features and make it easier for administrators to make changes themselves.

2. **One platform, instead of two.** Administrators of lawhelp.org websites no longer have to make changes to two websites—a main version and a mobile version. All changes can be made to just the new mobile responsive platform.

3. **Friendly for users of all devices.** PBN's previous mobile platform was not as user friendly as desired. All users now can look at information that fits their screen no matter what type of computer or device they use. This optimizes this self-help resource for all low-income persons whose only access to the internet is a mobile device.

   Google Analytics does not collect data that allows an analysis of the users of mobile devices specifically to see how their usage may have changed from before the implementation of these changes. However, a comparison of the analytics for the former platforms combined and the new mobile responsive platform of MontanaLawHelp.org reveals several major findings:

   ➢ A significant increase (53 percent) in the number of users;
   ➢ A significant increase (48 percent) in the number of sessions;
   ➢ An increase (37 percent) in the bounce rate—the percentage of single page sessions in which there was no interaction with the page; It is unknown if this was from the home page or from a page with information. The more it was from the home page, the less engaged the users were, but the data is not available to determine that.
   ➢ The number of pages viewed decreased from 3.6 to 2.44. This could be due to users finding what they want sooner, less engagement, and/or other reasons.

➢ The average session length decreased by 38 seconds. This could be due to users finding what they want sooner, less engagement, and/or other reasons.

When PBN launched the mobile responsive platform in October 2016, they analyzed the differences between the old mobile platform and the new mobile responsive design to try and understand how successful the new design was. Visitors on LawHelp sites that began (landed) on the homepage and did not arrive directly onto a legal article were reviewed. Then, the proportion of those visitors who ultimately found their way into an article was reviewed. This ratio, between the number of visitors who began on a site's homepage and the subset of those visitors who viewed an article, is a good indicator of how successful the site's structure is at helping people browse and find what they want. The ratios for desktop and mobile visitors were compared. Among the group of states that were still using the old mobile platform, the difference between the desktop ratio and the mobile ratio was between 30 and 40 percent—mobile users were 30 to 40 percent less successful in viewing a legal article. Meanwhile, among the group of states that had the new mobile responsive design, the difference between the desktop ratio and the mobile ratio was virtually nonexistent. In other words, mobile visitors were about as likely to be successful as desktop visitors when trying to navigate the site.

| TABLE 2: MontanaLawHelp.org Users and Sessions* | | | | | | |
|---|---|---|---|---|---|---|
| Platform | Users | Sessions | Users First Visit (% of Sessions) | Bounce rate | Average # of pages viewed | Average Session |
| Former mobile | 11,958 | 14,981 | 79% | 42% | 5.53 | 2 min. & 8 sec. |
| Former desktop | 46,398 | 62,680 | 73% | 46% | 3.14 | 2 min. & 49 sec. |
| Former combined | 58,356 | 77,661 | 74% | 45% | 3.6 | 2 min. & 41 sec. |
| | | | | | | |
| New mobile responsive | 89,012 | 115,079 | 77% | 62% | 2.44 | 2 min. & 3 sec. |

*Comparison of users and session the year before implementation (September 14, 2015 - September 15, 2016) and the year after implementation (September 17, 2016 - September 18, 2017).

**Objective 4: Build-out of technology to push and pull data to and from clients, using the case management system and optional mobile interface to better streamline the intake system and improve the efficiency of services to clients.**

This objective has been successfully achieved. MLSA and PSTI developed the ability to push and pull data to clients. Using SMS text and mobile data entry, clients are provided with a unique URL to complete digital forms. A digital form is a form that an applicant or client can complete electronically by clicking on a link. The six digital forms MLSA created are listed below.

The link to the digital form can be texted or e-mailed to the client. The applicant/client clicks on the link to access the form, completes the form, and submits it to MLSA electronically. The forms are built into LegalServer so when a client completes a form, it is stored automatically as a document in the client's LegalServer case file.

Clients can also upload other documents from their mobile device or email and the documents are saved to their electronic case file. During testing MLSA was able to upload documents and attach them directly to case files. MLSA rolled this feature out in October of 2017. Between October 27, 2017 and November

9, 2017, eleven requests to submit documents were sent to MLSA clients. MLSA was able to obtain documents for four of the eleven clients. MLSA plans to conduct additional training in 2018 for its staff on utilizing the feature to have clients submit forms.

**Testing and Feedback**

After applicants or clients submit a digital form, they receive a text or e-mail confirming MLSA received it. At the end of the digital form are three evaluation questions: *(1) Did you find the form easy to use? (2) Did you find it more convenient to get this form electronically, instead of through the mail? (3) In the future, would you prefer to receive forms like this by US mail or electronically?* Testing was done with 61 clients that received and completed a digital form from March – June of 2017. All 61 said the digital forms were easy to use. Three testers were unsure about the convenience of the forms, but successfully completed the form. Only one tester preferred to receive future forms by mail.

Fourteen MLSA staff members tested the forms. No issues were found during their testing.

**Accomplishments and Outcomes**

1. **Digital forms created.** The digital forms developed include the following:

   - Citizenship Attestation form
   - Consent to Refer to Modest Means
   - Limited Assistance Retainer Agreement
   - Limited Assistance Retainer Agreement & Citizenship Attestation
   - Release of Information for the Family Law Project & Citizenship Attestation
   - Housing Interview for evictions/termination of lease/rental agreement[2]

2. **Decreased time to receive forms.** The digital forms have increased MLSA's efficiency by shortening the time it takes to receive forms needed to begin or refer a case. This also improves the client's experience. An example of this is the digital Modest Means Consent to Refer form. This digital form gives MLSA permission to share the applicant's information with the State Bar of Montana's Modest Means Program in order for them to refer the case to an attorney for assistance without having to repeat the intake process already completed by the applicant.

   Twenty-six referrals each during January – June 2016 and March – June 2017 were compared to determine the increased efficiency for getting this form signed. Table 3 shows the dramatic drop from nearly nine days to 1.3 days to obtain a signature and be able to refer the case for assistance. The number who signed the same day nearly doubled.

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[2] This form has not been used yet because it is designed for use when there is a backlog of applications. A Justice for Montanans staff person has been able to keep up with the applications, so it has not been needed yet. The JFM member will test it soon. If it works well, MLSA will incorporate it into the intake process by August, 2018 when it is short-staffed during the AmeriCorps transition month. It should allow MLSA to process the housing intakes more quickly if the applicant can answer the basic questions before MLSA sends it to an attorney for review.

| Table 3: Obtaining Permission for Referral to Modest Means Program | | | |
|---|---|---|---|
| Time Period | Avg. # of days to get signed consent | Signed the same day | Methods |
| January – June 2016 | 8.9 days | 10 of 26 | 4 e-mail and 6 in-person |
| March – June 2017 | 1.3 days | 18 of 26 | Digital form |

Thirteen of the twenty-six referrals that signed the digital form lived in the more rural areas of Montana where MLSA does not have a physical office. The other five applicants lived near one of MLSA's offices, and were able to provide their signature without having to take time off of work or leave their home.

MLSA's Pro Bono Coordinator stated, *"I really appreciate the digital forms. Those have greatly improved our ability to get required documents from clients quickly."*

3. **Staff instructions for new and continued reference**. MLSA developed *MLSA's Guide to Using Digital Forms in LegalServer*, which provides detailed instructions on how to use each of the digital forms. All staff were trained in February and March, 2017. New staff are trained on how to use digital forms when they start employment with MLSA. The document, "MLSA's Guide to Using Digital Forms in Legal Server" is included as Attachment 2.

4. **Digital forms log**. A Digital Forms tab in each case file contains a log that lists which forms have been sent and when, whether a form was e-mailed or texted, when a client accessed a form, the date the form is completed, and the expiration date of the form if it is not completed.

5. **Continuous evaluation.** Each form includes three evaluation questions at the end that provide MLSA with continuous feedback about applicants'/clients' satisfaction with using the digital forms.

**Objective 5: Conduct outreach and publicity to increase the availability and use of mobile intake system and mobile/texting communication options.**

The "hard launch" of promotion of the mobile and texting enhancements began on July 28, 2017. Flyers about applying online were distributed at Veteran Stand Downs and some organizations that provide services to low-income Montanans, such as a Self Help Law Center, and Project Homeless Connect. E-mail notices were sent to programs that provide services to victims of domestic violence. Two "Legal Tip of the Week" were e-mailed to 628 contacts and published in 14 small town newspapers with a combined circulation of more than 4,600. Notice was also posted on Facebook and through MLSA's blog.

**Feedback**

Many respondents to the partner survey were unaware of the ways MLSA has made MontanaLawHelp.org and its online application more user friendly, particularly for mobile users. They wanted more information and gave a variety of suggestions for further outreach, which are detailed in Section VI.

### IV.a.     INFORMATION FOR MULTI-YEAR OR MULTIPLE PROJECTS

MLSA incorporated the lessons learned and many recommendations from its previous mobile technology, MontanaLawHelp.org, and Legal Server integration projects, including the following:

- the importance of plain language script development
- the necessity of devoting adequate staff resources to support the integration of new technology into existing platforms and software
- the importance of active participation in the vendor build-out of necessary technologies
- not underestimating the complexity of integrating new communication systems into LegalServer, especially those that require interrelated components
- engaging in significant user testing so the end product meets user needs, rather than preconceived ideas about what users need

### V.     FACTORS AFFECTING PROJECT ACCOMPLISHMENTS

### A.     Significant challenges

1. **Managing a multi-component project.** One significant challenge the project director faced was the complexity of managing a project with multiple, major components with two technology vendors and many moving parts. There were times it was confusing managing so many details with numerous modifications being made to the components of each of the objectives.

2. **Customizing existing functionality of technology tools.**  The Customer Support Specialist with LegalServer who worked on this project identified the only major hurdle from her side of the project as determining the best way to use the existing LegalServer tools to create the flow of intake MLSA requested.

### B.     Factors affecting the project's accomplishments

1. **Enhanced by prior experience.** A factor that significantly enhanced the project's accomplishment was MLSA's prior experience with technology development. The project director, executive director and other staff have learned many lessons through their implementation of numerous technology projects. That experience always serves them well when they undertake the next project.

2. *Limited by less than optimal amount of outreach.*  A factor that may have limited the use of the online application so far is that outreach has not been as widespread as would be beneficial. Individuals in the partner organizations that completed the evaluation survey were not as familiar with the online applications as desired.

### VI.     STRATEGIES TO ADDRESS MAJOR CHALLENGES

**A.     Managing a multi-component project.**  One of the major strategies the project director used to keep up with and manage the multiple details of the multiple components was having regular check-ins with the technology vendors in order to keep the details fresh in her mind and help keep the vendors on track and timely. The importance of doing this was a lesson learned from previous mobile technology, MontanaLawHelp, and Legal Server integration projects.

PBN staff was particularly amenable to these regular check-ins and doing it by telephone instead of e-mail because the changes they made to MontanaLawHelp affected the Probono.net platform for all organizations that use it, and thus had major ramifications for them.

The LegalServer staff person said this project strengthened her awareness that *"communication on these projects is key. Through communication with MLSA, I was able to understand the core functionality that they required and some other areas that they were willing to tweak to fit the tools available."*

**B.** **Customizing existing functionality of technology tools.** Considerable testing and reconfiguration was done to make sure the system operated as MLSA requested. An example of this was making the "Online Intake Legal Problem Code" block display the problem code options in the way MLSA wanted them displayed. Changes were made to the plan to fit within the parameters of existing functionality while making sure the system operated as needed.

**C.** **Additional outreach.** Further targeted outreach will be completed that includes more in-person contact with organizations to ensure information is reaching direct service staff. Flyers and other marketing materials will be distributed to all Self Help Law Centers, domestic violence organizations, Human Resources Development Councils, Area Agencies on Aging, and libraries. Flyers, Helpline business cards and other marketing materials will emphasize, "apply online." Self Help Law Center staff will be asked to tell their customers about the new online intake and MontanaLawHelp.org. A recently-implemented training for librarians will give an opportunity for information to be distributed to them. Better coordination with the state's Elder Justice Program will also be pursued.

**VII.** **MAJOR LESSONS AND RECOMMENDATIONS**

**A.** **Important Lessons Learned.**

1. **Regular check-ins with vendors.** Set up a check-in schedule with each vendor and stick to it. These regular check-ins help to (1) keep the details fresh in everyone's minds, (2) keep the vendors on track and timely, and (3) address issues when the vendor believes something works a particular way, and it is not working that way for the organization. Being able to explain issues to the vendor in a timely manner so they can fix them is critical.

2. *Vision v. reality.* The new online intake application is very different than how the project director had thought it would be. Many changes that were envisioned would have been too time-consuming and expensive to implement, so the application was simplified.

3. **Flexible strategies.** When MLSA applied for the TIG, an objective was to improve the mobile version of MontanaLawHelp.org. Between the time of the application and contracting with PBN, a mobile responsive platform was being developed by PBN. MLSA was able to be flexible and change the strategy from one of improving the former separate mobile version to using MontanaLawHelp.org as the site for testing and refinement of PBN's mobile responsive platform. This allowed MLSA to accomplish its objective by using a different strategy that was within the grant budget.

It is important to write grant applications that allow the use of different or newly developing/developed strategies that accomplish the objective in a better way, within the available financial resources, because technology can change more quickly than grant cycles.

4. **UX consultant audit.** Having an audit by a UX consultant can lead to what look like some simple design recommendations, but implementation of them may require major structural platform changes. For example, one of the recommendations was to change the font size on MontanaLawHelp.org. The PBN LawHelp Coordinator analogized the work this change involved to raising the ceilings on a house by one foot after it is built. The time it takes to make these types of changes need to be built into any projects that involve website projects that include a UX consultant's audit.

5. **Staff training and encouragement.** Like all technology, some staff adapt to it and use it more easily than others. The staff survey asked, *"If you have not used LegalServer to text clients, why not? What would help you be more likely to use it?"* Some responses included, *"There is no guarantee if their cell phone is working or not." "Haven't had time to look into the option. LegalServer is my nemesis." "I feel that texting of client is too informal a mode of communication. Encouragement and support from MLSA staff could change my perception."* Meeting individually with staff to discuss their concerns and help them use texting, when appropriate, is something that should be done to standardize and economize service.

6. **Continuous testing and evaluation.** As described in Section IV, MLSA used a variety of testers. One strategy that addressed the challenge of having enough or the right testers was to acknowledge that the evaluation of the new technology by the end users needs to be continuous. The applicants who complete the online survey after completing an online application continue to be testers, the clients who complete the digital forms continue to be testers, the staff who text using LegalServer continue to be testers. Being open to improvements sought by users after the launch is key to doing "enough" testing.

B. **Recommendation for other implementers of this technology.**

1. **Financial eligibility in online intake.** MLSA's former online application had financial questions in it. Financial questions were not included in the new online application because MLSA wanted to shorten the online application process for the applicant and because the Intake staff had to call the applicant back anyway to confirm eligibility.

MLSA is now considering adding some financial questions to the new online application in order to streamline the process for those applicants who meet the criteria for a referral to modest means (over income or outside MLSA's priorities), a pro bono attorney, or a clinic. This should result in applicants and clients receiving services sooner, including by being able to schedule a clinic appointment themselves while still online.

Other implementers of online intake should make these considerations when determining how much information they want an online applicant to provide.

C. **Recommendations for further development, adaptation or use of the technology developed through the project.**

1. **Increase the efficiency of texting from LegalServer.** Currently MLSA has canned texts for some of its messages to clients. However, the client's information and appointment information must be inserted into the message before sending. The texting feature could be enhanced by development of the ability to pull client information from LegalServer into texts so some text messages can be completely canned. This would increase efficiency in many instances, especially for appointment confirmations and reminders.

2. **Streamline online intake disclaimers.** MLSA's online intake's disclaimers are multiple screens before an applicant can begin to give their information. Developing a more succinct way to convey the needed information would be a good challenge to address. It may increase the number of applicants who complete an application.

3. **Increase the efficiency of digital forms.** Currently, the primary casehandler has a red bar appear on their LegalServer home page when a digital form is received in one of their cases. Non-primary casehandlers have to enter a task into LegalServer to remind themselves to monitor the status of digital forms. The digital forms feature could be enhanced by development of the ability for LegalServer to send an e-mail to notify a designated staff person(s) when a text or digital form is sent or received between LegalServer and a client.

4. **Build out more digital forms.** MLSA has identified additional digital forms that would increase case efficiency. Development of additional forms would help all users of LegalServer who want to use digital forms.