

TIG FINAL EVALUATION REPORT

Grantee Name: Michigan Advocacy Program
Submission Date: February 21, 2019

TIG Grant Number: 15016
Approval Date: 2/27/2019

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I. Project Goals and Objectives

The Project Goal was to increase access to justice for all people in Michigan seeking legal assistance by building an online triage system that directs litigants to the most appropriate resource(s) for their problems and creates efficiencies in legal services program intake systems.

The specific objectives were to:

- 1) Design and build a statewide triage system in Drupal that uses expert logic to direct users to the most appropriate legal resource(s) along the continuum of available services that is likely to result in a resolution to their legal problems; and
- 2) Collaborate with legal services providers around the state to develop a triage system that creates efficiencies in their intake systems by routing clients to intake who qualify for services and whose legal problems are within the priorities of each program, and diverting everyone else to other available resources.

There were no significant changes in the goals during the course of this project.

II. Evaluation Data and Methodologies

The approved evaluation plan included many ways to assess the project's accomplishments, and there were no changes to that plan. We collected and analyzed several pieces of administrative data: the number of Michigan Legal Help (MLH) website visitors accessing the triage system (hereinafter the Guide to Legal Help, or "the Guide"), obtained through web analytics; the number of Guide users who were directed to legal services intake, obtained through web analytics; the number of Guide users using online intake who were served by legal services, obtained from Pika CMS reports; and the activity of Guide users upon finishing the Guide, obtained through web analytics.

In addition to administrative data, we collected survey data and descriptive data. Survey results came from individuals completing the Guide (793 respondents as of 2/13/19), who gave

feedback on the usability and usefulness of the system; from user testers and beta testers of the system while it was in development; and from legal services staff (34 respondents as of 2/21/19), who gave feedback about the impact of the triage system on intake volume and appropriateness of clients getting through to intake. Descriptive data collected for the evaluation included a description of usability testing protocols, significant test results, and notable changes made based on results; a description of types of outreach conducted; a description of the technical components and functionalities/capacities of the triage system; and a summary analysis of system effectiveness and efficiency, and areas for improvement.

III. Summary of Major Accomplishments, Recommendations and Future Steps

For this project, we created the Guide to Legal Help as part of the MLH website, which:

- Collects minimal information from visitors, and uses that information to guide them to the most appropriate self-help resources and legal assistance referrals;
- Steers people away from resources (such as free or modest means legal services) for which they do not qualify, saving both individuals and programs time and frustration;
- Steers people to resources (such as free or modest means legal services, or specialty legal services) for which they do qualify, connecting people directly with the best resource for them and avoiding a chain of referrals;
- Orders the results (legal information vs legal representation) based on a simple algorithm fed by information from the end-users;
- Integrates with online intake for LSC-funded legal services programs, ensuring a warm handoff;
- Provides referrals to the State Bar's lawyer referral service, lawyer directory, modest means panel, and local bar referral systems as appropriate;
- Was built to incorporate future integration with the State Bar's online lawyer referral service and lawyer directory to ensure warm handoffs;
- Provides referrals to online dispute resolution centers, alternate dispute resolution centers, domestic violence shelters, and other resources as appropriate;
- Has been completed by 60,476 people between 10/6/2017 and 2/12/2019;
- Takes an average of 107 seconds to complete;
- Helps us evaluate and improve the services we provide by giving us new data about our visitors, their wants and needs, and activities on the website;
- Is a product of great collaboration among legal services providers and others in the legal community;

- Is built on and added to/updated in an existing Drupal triage module which others can adopt;
- Has a user-friendly administrative interface that enables MLH staff to easily make modifications; and
- Went through several rounds of user testing and later modifications to ensure usability.

Throughout this process we learned a great deal and built a great tool. We hope this project and report can help others hoping to carry out similar projects. In addition to accomplishments, we have recommendations and future work we'd like to do related to the project, including:

- Setting up better analytics reports and data collection methods;
- Improving the logic trees or replacing logic trees with another system that better enables end users to identify or describe their legal problems in ways that fit within the triage methodology;
- Setting up systems to track outcomes/next steps of Guide users, such as texting with users and analyzing CMS data for cases the Guide referred to legal services programs, specifically analyzing levels of service to determine how good the Guide is at sorting cases for referral.

IV. In-Depth Analysis of Accomplishments

The project goal and two detailed objectives listed on the evaluation plan were achieved.

A. **Objective 1: Design and build a statewide triage system in Drupal**

Building the Triage system: With this TIG, we built the Guide to Legal Help on Michigan Legal Help, which quickly gathers a minimal amount of information from users and then refers them to appropriate legal information resources (educational materials and form-completing tools); appropriate legal aid programs and/or low-bono and private lawyer referral systems; and community or government resources available in their community that are tailored to their individual needs. The Guide saves both end-users and service providers time by giving end users the best possible resources in their geographical area--only those resources that are compatible with the user's needs and likely to be helpful based on the priorities of service providers. This efficiency eliminates bad referrals and the need for people to talk to several agencies before reaching the one that can help them.

As reported in milestones, as part of the planning process, MLH staff reviewed other states' triage systems and surveyed Michigan's Legal Services directors as to their functional priorities

for the new triage system. To that information and input we added internal design ideas and desired features, then created a detailed project plan and RFP for a developer to build the system. Several developers responded to the RFP, and ultimately Brian Dyer Stewart of BDSWorks was selected and brought under contract.

The Guide was built on Drupal. It began as the template Brian Dyer Stewart had created and used for Maine's triage system and others. Over the course of the next year and a half, many modifications were made to this template to add additional features and tailor the content to Michigan's specifications. Three rounds of user testing were completed, and the final system was launched on October 6, 2017, although this was intended as a soft launch and was not widely publicized until November 2017.

Regular progress reports were given to and feedback obtained from Legal Services program directors at bi-monthly Legal Services Association of Michigan meetings. Directors were asked to nominate 1-2 staff people for each organization who were familiar with intake processes and priorities for program offices, and a work group was created of these individuals and MLHP staff. This work group helped refine the logic trees and gave other feedback on the triage system as it was being built.

Building the logic trees: The triage system is built upon a series of logic trees that use simple questions with no more than five answer choices to help a user narrow down and identify their legal problem. To create the logic trees, MLHP staff began with drafts of logic trees from other states, and made modifications to account for Michigan laws, content available on the MLH website, and procedural postures of importance. These logic trees were developed in Excel spreadsheets after testing with other systems. The Excel spreadsheets were somewhat complex to create and interpret, but were the best among available options. They were uploaded into the triage system when complete.

Once draft logic trees in all substantive areas covered by the MLH website and the Legal Services providers in Michigan were complete, MLHP staff convened two three-hour meetings of the work group identified above. These meetings were held by webinar, and staff from MLHP went through the logic trees in great detail. Work group members gave valuable feedback about topics that were missing and ways to rephrase questions and answers that align with the ways clients talk about their legal problems. MLHP content attorneys made revisions to the logic trees based on feedback from the workgroup and began making differentiations based on what Michigan Legal Services providers use when deciding whether or not to accept cases and for what level of service. Then the Protection from Abuse logic tree was uploaded into the triage system for testing. MLHP staff tested the system thoroughly with this logic tree in place

and suggested changes which were made by Stewart. After many weeks of testing and tweaking, two additional subject matter logic trees were uploaded to set the stage for end-user testing and Legal Services partner testing. Feedback from Legal Services partners was uniformly positive, and only reflected a few minor errors that were quickly resolved.

Description of usability testing protocols, significant test results, notable changes made based on test results, and feedback from usability testers: The first round of user testing was done in December 2016 at two locations, the Ypsilanti District Library and the Wayne County MLH Self-Help Center. We had four goals for this round of testing: to learn whether the beta version of the new triage system facilitates users' access to content and other resources; to determine how easily users could find specific content under current information architecture; to gain a realistic picture of how users interact with MLH; and to gather feedback on triage system design and usability (question length/type, layout, results page, etc.). A total of 32 people participated in this user testing, and valuable feedback included the following observations:

- A tester who wanted more options for choices in Step 5 - thought choices were too limiting;
- A tester who became frustrated with a drop down box for income and wanted it to have "#" symbol in it so that she would know to key in a number;
- A tester who felt the triage was very speedy and gave her exact information; she liked the "back" feature if she needed to change her answer and the hover that highlights the answer before clicking; she was very pleased with resources offered and how self-explanatory the resources were; and
- A tester who was not happy with the resource page because she felt it was intimidating that the first choice was a lawyer link, as if she were being directed to contact an attorney first.

Additional user testing was done in June 2017 at Motor City Pride in Detroit, a different Ypsilanti District Library, the Oakland County MLH Self-Help Center, and Go! Ice Cream, a popular ice cream shop in Ypsilanti. One last round of user testing was done at the East Lansing Public Library in Fall 2017. Different types of testing occurred at these locations: testing icon options, onramps to the triage system, the mobile version of triage, and the triage and online intake systems.

23 people participated in the long form user testing of triage and online intake at the library and Self-Help Center, and valuable feedback included the following observations:

- A tester who thought questions got to the point, but got annoyed by step 4. Very satisfied with results, glad he didn't have to enter an email address;
- A tester who preferred triage to browsing the site, and preferred browsing on a laptop. The tester thought the bottom banner looks like spam;
- A tester who thought triage was easy to understand, but found the progress bar on triage distracting;
- A tester who thought the popup seemed like an ad. The user wouldn't click the top button because "Guide" seems like it'll be a big PDF download. "Guided pathway" seems too general. The tester thought income was irrelevant because he's only looking for information. The tester would like key words, a story, or an example of a court case. That makes it easier to read the articles;
- A tester said that more questions are better when you're scared.
- A tester noted triage was easy to use, common sense, and easy to use on a phone.

20 people participated in testing the mobile version of the Guide to Legal Help at the ice cream store (in exchange for a free topping). The goal of this testing was to determine whether a banner or a pop-up was the better way to engage people in the Guide on a mobile device. Interestingly, more people preferred the banner (55%) to the pop-up (30%), but when presented with both options, more people clicked the pop-up (24%) than the banner (14%). However, the majority of people ignored both options (33%) or failed to notice either (29%), indicating that neither was a particularly good option. Ultimately, we decided not to use the pop-up on the mobile device. This lack of good options was borne out in the launch, as use of the Guide among mobile users is smaller than overall mobile use of the website. 60% of overall website users are mobile users, while only 37% of Guide users are mobile users.

The user testing at the Pride festival was very short. We asked visitors to our information table which icon they preferred for the Guide, given a description of its function, and they were asked to point to the link to the Guide on a paper mock-up of our home page which included links in the header and the footer. This testing led us to choose the existing icon (a google-map style arrow) based on popularity, and placement of the link in the header of the website because that is the link that more testers were drawn to when looking briefly at the mock-up. 12 people participated in the testing in East Lansing, primarily to determine feedback on the mobile version of the Guide. Detailed testing documentation, including testing workflows, testing scenarios, and results, is available upon request.

Types of outreach conducted: The primary way we want to drive users to the Guide to Legal Help is through the onramps on the Michigan Legal Help website. We have several of these: an animated GIF on the home page; a button in the header of the website; a link at the top of the

search results whenever anyone does a site search or selects a subject area to see the resources there; and a pop-up that appears when a user has been viewing a page for more than 5 seconds. We consider this our biggest type of outreach, because our biggest audience is the ~30,000 people per week who are already on the website looking for legal information and referrals.

Other forms of outreach in November 2017 included issuance of a press release to relevant news outlets and items on our social media outlets. Several other organizations' social media outlets shared our announcement, allowing us to reach even more people. We also sent a hard copy of the press release and a full-color, 8 1/2 x 11 flyer about the Guide to every court, library, legal aid office, Self-Help Center, and domestic violence shelter in Michigan. We asked the recipients to share this information with staff who would direct people to the Guide, and post the flyer in a place where the public could see it.

Description of the technical components and functionalities/capacities of the triage system:

See attached document; members of the access to justice community can contact MAP to receive a copy of this document.

Number of users accessing the triage tool: According to Google Analytics, between 10/6/17 and 2/12/2019, there were 179,950 pageviews of the Guide's landing page. This represents just 3.44% of all pageviews on MLH. According to the internal Drupal triage reporting analytics, 60,476 people have completed triage during this same time period; 1,432 people were diverted after the first question because they don't live in Michigan, and 25,918 other people exited the Guide before reaching the end. This means that of the 87,826 people who actually began the guide, 69% complete it; 1.6% are diverted to a similar resource in another state; and 29% exit the guide without completing it. Of those who exited early, 21% exited before answering any questions; 1% leave during step 1 (service area/type of help); 4% leave during step 2 (status); 13% leave during step 3 (income); 5% leave during step 4 (other factors); and 56% leave during step 5 (legal issue, where they enter the logic trees to narrow down their legal problem). We think a 70% completion rate and the number of users reflects an effective, efficient, and far-reaching screening system as compared to reports from other triage systems in the country.

Guide users represented every county in Michigan, including 20 users from Keweenaw County (population 2,105). Nearly 86% of users selected one or more of the "Other factors" that are used to help prioritize what type of assistance the person needs (self-help vs. representation). The top legal categories Guide users sought help in were family (55% of all users); Housing (16%); and Money and Debt (10%). In terms of income, 35% of users were below 100% of FPL; 26% were in the 100% - 200% FPL range; 11% were in the 200% - 300% range, and 10% were

over 300% FPL. These statistics show that a fair number people throughout the state are finding and using the Guide, and we're reaching our target audience of low and middle income people.

Number of users accessing triage tool who are directed to legal services intake: Between 1/29/18 and 2/12/19, 31,903 users have been directed to legal services intake. This makes up 67% of all users who finish triage. (This metric was not collected at the launch, but added later.) Unfortunately, we don't know how many of these users follow up by contacting legal aid, since few programs track how clients were referred to them (and clients are not always accurate reporters of this information).

Activity of users upon exiting the triage system (tracking usage from 10/17 - 12/18): A very interesting metric that is hard to track is what users do after they finish the Guide. We looked at this a few different ways, but it would be beneficial to have a Google Analytics expert work with us more to refine these reports. This is a goal for the future, and a recommendation for others building similar systems.

One report looks at the next click of users after reaching the Guide results page, which is difficult because some are other pages on MLH and some take users off the MLH site. 8% of users click directly on a link to find a private or legal services lawyer. 54% of users look at a legal information page on MLH; of these users, 33% went to an article; 25% went to a toolkit; 23% went back to a page of the Guide (presumably to change an answer they gave); 4% went to online intake (which is only available for 2 programs at this time); 4% took our survey; 4% returned to the MLH home page; and the rest were spread out among other resources. We looked closer at the next steps of the users of our most popular endpoints for additional information. The most popular Family endpoint (divorce with children, need to file) showed that 19% clicked on the divorce with children toolkit; 19% clicked on the Introduction to Divorce article; 10% clicked on a lawyer resource; 5% clicked on the DV and divorce article; 5% clicked on the user survey, and 5% returned to the MLH home page.

We also know that 11,945 Guide users — 20% — clicked on State Bar links at some point after they finished the Guide, indicating that they were seeking assistance from a private attorney. Of these, 42% opted for the Lawyer Referral Service, 35% opted for the Find a Lawyer function, 14% selected the Modest Means panel (which was only offered to those who qualified under the income limits), and 7% selected the State Bar's Legal Resource and Referral Center rather than picking a particular option. We know that all of these clicks came from Guide users, since the only way to access these links is by completing the Guide.

Other statistics are more challenging to get, and we were not able to set up the necessary reports to collect them. For instance, we don't know how many users clicked on LiveHelp after

completing the Guide, or how many clicked outbound links such as those to our DIY Forms hosted on LHI. This is an area we hope to improve in the future, but we need more GA capacity in order to do so.

Surveys from triage users re: usability and usefulness of triage system, and user suggestions for improving navigability of system: Between the launch of the Guide to Legal Help on 10/6/18 and 2/12/19, 793 people have completed the accompanying survey. Of these, 48% found the Guide very easy to use, 40.1% found it kind of easy to use, and 11.9% found it not easy at all to use. When asked how useful the Guide was, 32.9% found it very useful, 44.3% found it kind of useful, and 22.8% found it not useful.

Reports from other triage studies have suggested people report dissatisfaction with a tool when they are not given the result they want — i.e., referral to legal services. However, our survey results showed that we had information and legal referrals for 45% of respondents, and 46% said we did not have the information they needed, which shows that people found the Guide helpful even if we didn't have exactly what they wanted. When asked what kind of results and referrals they got, 24% of respondents answered "Articles and Toolkits"; 36.6% responded with "Forms and DIY Tools"; 31% with "Legal Services or Legal Aid Program"; 31% with "Michigan Lawyer Referral Services"; and 8% with "Court-Based services." Again, this shows that even if people weren't given a referral to a free lawyer, they seemed to find the Guide useful.

When asked if they would use the Guide again or recommend it to a friend, 54% of users said yes, 31.2% said maybe, and 14.9% said no. 175 survey respondents gave narrative answers to an open-ended question where they could make suggestions; a sampling of the comments with suggestions for improving navigability of the system are:

- "Under the 'housing' topical section, you don't have fair housing issues." (Note: these have been added);
- "Difficult to use. Nothing provided regarding guardianships even though listed" (Note: referrals to attorneys are included, but there is not yet any legal information about guardianships on MLH; those materials will be added during 2019);
- "I think that you should have a broader perspective of questions for various situations." (Note: this prompted us to add more "I have another [subject area] problem" as a bigger catch-all category);
- "Why provide options that lead to the result: We do not have forms relating to this issues?? I want a simple Durable Power of Attorney for Health Care." (Note: this is another area that is coming to MLH in the next year; it is included in the Guide now because we can make referrals to attorneys and other agencies);

- “Update yalls low cost lawyers” and “I think you all should put more free lawyer help on hear thank you” (Note: they are up to date and all included; these comments refer to the lack of low cost lawyers in Michigan. Hopefully this will change with new unbundling rules);
- “I wish you'd expand you knowledge to help peop!e like me. (Parents who's children/child will not leave the home/nest). Or someone with no lease.” (Note: these specific legal topics were added);
- “Some of your clients need to speak to someone to explain their problem.”

The survey asked other interesting questions resulting in useful information not completely relevant to this report; please see the attached survey results for more information.

Summary analysis of system effectiveness and efficiency, and areas for improvement:

See discussion below at pages 13-14.

B. Objective 2: Collaborate with Legal Services providers to develop a triage system that routes qualified clients to intake and diverts others to the next best available resource(s).

After the logic trees were created and integrated into the Guide, MLH staff worked with individual legal services programs to learn more about their intake systems, including the types of cases they typically accept for representation, those which they refer to the nearly-statewide hotline Counsel and Advocacy Law Line (CALL), and those which they do not accept for any level of service. MLH staff went through the hundreds of logic tree “end points” (each one representing a particular fact pattern a user might be experiencing) and directed those to the local legal services provider for immediate intake, to CALL for advice or brief service, to CALL for additional screening (and potential referral back to the legal services provider), or to neither CALL nor the local office, meaning those users will get legal information and private bar referrals, but no legal aid referral. Income eligibility information was also gathered from each organization (and sometimes differed by subject area or category of client) and that information was also incorporated into the Guide’s logic. This was a very time consuming effort for MLH staff and legal aid staff, but it ensured not only correct referrals, but also a deeper understanding of the Guide for legal aid staff, and created lasting relationships that are helpful whenever legal aid needs to modify some aspect of this information for their organization. These development methods worked very well for this project.

A Google Forms change request form tool was also created and shared with all Legal Services directors and members of the legal services work group. This survey can be used to submit

changes to MLH whenever areas of case acceptance/priority or eligibility factors change. A process was developed internally for MLH to make these changes whenever a survey response is submitted (although to date, no one has submitted any changes).

After each program's case type referral directions were integrated into the Guide, staff from that program tested the system and alerted us of any errors or changes they wanted, which were promptly addressed. This was done for the five LSC regional programs and 9 other programs in Michigan, plus a handful of law school clinics, and all work was accomplished before the Guide was launched in October 2017.

The final step of this aspect of the project was to connect triage to online intake. The development of online intake was not part of this project and was funded by a grant from the Michigan State Bar Foundation. However, one part of this project was to integrate data obtained from triage into the online intake process, allowing for a seamless transition from Guide to Online Intake (for the user) and then to the Pika CMS (for the legal aid staff). This was done, and at this time online intake is live for CALL/Lakeshore Legal Aid and Legal Services of Eastern Michigan. Online intake for the Michigan Advocacy Program is set to go live on March 1, 2019, and there are plans to get Legal Services of Northern Michigan and Michigan Indian Legal Services live in 2019. Legal Aid of Western Michigan is using its own online intake system for case types referred directly to them, but people referred to CALL from their services areas are using the online intake system connected to triage.

Number of triage users who do online intake applications with legal services, and number of those served: Online intake took longer than anticipated to be launched, and the roll out was slower than anticipated, so this data is inconclusive at this time. The most online intake takes place at CALL because most legal aid programs direct the majority of income eligible clients there to be screened for full service (and referred back to the local program) or to be given advice/brief service. For this reason, online intake was launched at CALL first. Between 4/13/18 (when online intake was launched at CALL) and 1/31/19, 1,616 online intake applications were submitted; 49% of those (796 people) were served; 12 applications (1%) are still pending; and 49% (788) were not served. Initially, online intake at CALL was only open to those applicants who were applying from the service area of Lakeshore Legal Aid. In early May, applicants from Legal Services of Eastern Michigan's service area were added, and in early June, applicants from Legal Aid of Western Michigan's service area were added. As online intake is adopted by the Michigan Advocacy Program and Legal Services of Northern Michigan in the first quarter of 2019, applicants from these service areas will also be able to submit online applications to

CALL. As a result, we expect all online intake numbers for CALL to be much higher in 2019 than in 2018.

Of the online intake applicants not served, 468 (29%) chose not to proceed/were not reached by CALL/did not return phone calls to CALL to complete the intake. The difficulty in following up with clients who submit applications is a common problem among online intake systems across the country. 89 people (6%) were rejected for being conflicts of interest. 111 (7%) reached CALL through the hotline in addition to online intake, and already had an open file within CALL, so these applications were rejected as duplicates. 74 people (5%) were rejected for other reasons. Only 10 people (1%) were rejected for being over income, and 35 (2%) were rejected for being an unauthorized caller. These numbers indicate that the triage process is doing a very good job at screening out ineligible applicants based on income and case type.

At Legal Services of Eastern Michigan, where only a few case types are referred from triage directly to a local office and users are given the option of online intake, only 35 applications were submitted between 5/17/18 (when online intake was launched there) and 1/31/19. Of these, 80% (28) were rejected, 34% for client chose not to proceed/was no show; 6% for conflict of interest; 9% for duplicate file; 11% for over income; and 20% for other. For the first few months of online intake, there was a glitch in the system which allowed clients to submit online intake applications without going through triage; this may account for some of the high rate of rejection. LSEM also directs very few case types to their local office (most are directed to CALL) which explains the low use rate. We continue to investigate these numbers and work with LSEM to expand use.

Staff and management surveys re: impact of triage system on intake volume, appropriateness of clients getting to intake: It is hard to measure the impact of triage on intake volume and the appropriateness of clients getting to intake because intake is vast and only a fraction of people are referred there from the Guide at this time. One way to do this is by surveying people involved in intake to get anecdotal information. On January 30, 2019, an email was sent via the 'Legal Services All' list serve asking all legal services staff in Michigan to complete a short survey about their perception of the Guide's impact on intake. A follow up email was sent on 2/20/19. As of 2/20/19, there have been 34 responses. When asked whether they had noticed an increase or a decrease in intake volume, of the ten people who gave a substantive answer, 80% said it was the same, 10% said it had grown and 10% said it had gotten smaller (two thirds of respondents didn't feel qualified to have an opinion). When asked if there had been a change in the appropriateness of clients coming to intake, of the 7 people responding substantively, 4 said they had not noticed a change while 3 said a higher proportion of clients coming in to intake were eligible and within case acceptance guidelines.

Other more concrete data might help us understand the impact of the Guide on intake. Data from CALL was obtained about the number of calls rejected from the hotline from 1/2017 - 12/2018. In theory, the number of calls rejected, or the proportion of calls rejected, should go down after the Guide was launched. From January 2017 to October 2017, an average of 105 cases per month were rejected for being over income, out of service area, or out of priority, three areas of screening done by the Guide. The Guide launched in October 2017. From November 2017 to December 2018, the number of rejected cases fell to an average of 92 per month, an 11% reduction in rejected calls that may have been due to the Guide.

Summary analysis of system effectiveness and efficiency, and areas for improvement: It is challenging to summarize the effectiveness and efficiency of this system because it is large, and creates a large amount of data to analyze, yet none of the data is exactly the right kind of data needed to truly analyze the outcomes of the people who use it. Several other analyses of effectiveness and efficiency are found elsewhere in this report. That being said,

- The Guide to Legal Help appears to be efficient and effective in sending people to relevant resources. 70% of people who start the Guide finish it, and 73 % go from there to look at self-help or Find a Lawyer resources. Its efficiency is obvious in that it takes an average of 110 seconds to complete. One area for improvement is in setting up analytics to collect more relevant data to help us determine exactly how effective the Guide is.
- At a basic level, the Guide is effective in that it operates the way it is designed, and it is designed to be efficient. It gathers a very specific and minimal amount of information from people, and uses that information to match them with programs that are likely to help them. It also presents the referrals and information to people in a weighted fashion based on whether they are likely to successfully handle the problem themselves, or require help from an attorney. It provides a small number of other resources (mediation, social service agencies, public benefits information) that people haven't specifically requested, but which are likely to be useful to them and which they likely need based on their situation.
- The questions in the Guide appear to be efficient. Not only do most people answer them all, but their answers indicate a wide range of results, so each is useful at ferreting out necessary information. When asked what they want most (lawyer, forms, info, don't know), users are evenly split (30%, 29%, 30%, 10% respectively). Additionally, the "other factors" questions, which are used to rank order the types of help (self help vs. lawyer referrals), are not required, but 86% of users selected at least one factor, and on average, users selected 2.3 options.

- Future data will help. Once online intake is operational for all programs, it will be easier to determine what percentage of people who are referred to legal aid programs submit online intake applications, and what levels of service they receive from legal aid providers. Right now, we don't have these data points. We only have the number of people who receive referrals to legal aid and the number of people who submit online applications to CALL and LSEM.
- One clear area for improvement is helping people identify their legal problems. This is a known challenge among triage tools. While we offer over 400 specific endpoints that describe different types and stages of legal problems, five of the top 15 endpoints selected overall were generic, i.e. "I have a different [family, housing, consumer, etc.] problem." This means that people didn't see their legal problem identified in the choices either because it wasn't there, or because they didn't recognize it as describing their situation. When people select this option, we cannot give them tailored referrals or information – only generic ones.
- While the Guide is effective and efficient for people who use it, the vast majority of people who visit MLH do not use it. One area for improvement is to attract more mobile users to it, since they make up the majority of traffic to MLH. We have also recently changed some of the language on MLH to try to drive more traffic to the Guide from people who are searching for information on the website.
- One of the efficiencies of the system is that we take a high-level approach to making referrals to legal aid organizations. We make referrals based solely on case type and personal characteristics of users, and changes only need to be made to the system when there is a major change in an organization's grants, client eligibility criteria, or case priorities. Other states' systems require more frequent updating, such as whether a particular office is accepting cases at the moment. Given Michigan's relatively small number of providers, which are generally always open to new cases, we didn't feel like this level of detail was necessary, which makes the system much easier for us to maintain.

V. Factors Affecting Project Accomplishments

This project spanned several years and was the result of a huge collaborative effort among many people in Michigan. We have an end product that we are very proud of and appears to be efficient and effective. However, there were some struggles along the way.

Primarily, there was a delay in achieving some of the goals of this TIG because of delays in other systems that we hoped to integrate with the Guide. Two early goals were to connect to online

intake, and to connect with the State Bar's online lawyer search function and online Lawyer Referral Service. The online intake connection was made during this project, but online intake itself was much delayed, which means we didn't get a lot of data about the interaction between the two for this report. The integration with the State Bar's resources hasn't yet been made live, although the work has been done on our end to facilitate this once the Bar is ready.

We also experienced delays of our own due to scope creep—once we started building the logic trees and working with legal aid programs to determine which users to direct where, we realized we needed additional functionalities that took some time to build out.

Building the logic trees was challenging, and at first some of the local programs found it difficult to comprehend how the logic trees related to their programs in the grand scheme of triage.

In a few places, there were tensions around which agencies to make referrals to. In one geographic area of Michigan, there are two LSC programs with overlapping service areas. In other cases, there are multiple agencies offering similar services to a population, but we didn't want to overwhelm people with too many options, since one goal of triage is to only give referrals that are likely to result in service and not overwhelm end-users. We had to balance competing interests to come up with a result that was best for end-users.

A challenge we were made aware of early on was the limitation on the types of legal problems we had built into the system. We received complaints that people's legal problems weren't included in the Guide, and realized that in fact, this was the case. To resolve this, we added some specific scenarios, and some generic options (e.g., "I have a different money/debt question") to every category, and gave generic referrals (to CALL for legal aid eligible people, and to the State Bar for others). However, this is an imperfect solution, as these resources probably aren't that helpful to the end-users. We suspect that for a large number of people selecting generic options, we do in fact have relevant information, but they didn't understand that their legal problem was covered by the other choices.

We would love to see more people using the Guide. While an average of 123 people per day complete the Guide, this only makes up less than 5% of all the people accessing MLH. We also struggled with the question of whether or not to translate the Guide into Spanish; at present, we have decided not to, but may do this in the future.

Another factor affecting the project was the complexity of the technology involved, and the challenge of having one person build the system when another person will be maintaining and modifying it. Our contract developer was fantastic, but it is challenging to document everything needed to ensure future modifications can easily be made by MLH web developer staff. We find

ourselves relying heavily on him even now when we run into problems. Administrative upkeep of the Guide by MLH staff can also be technologically complex at times.

Finally, the amount of data being created by a system like this, which is also integrated into other systems, is very large. It is challenging to sift through this data and properly structure the analytics to learn more about the Guide's impact; we hope to improve this in the future.

VI. Strategies to Address Major Challenges

Our main strategy to address all the challenges we faced in building this complex tool was continuous testing – testing of functionalities ourselves, partner testing, and end-user testing. There were a lot of bugs along the way that required creative solutions; there were a lot of design decisions that required user testing; and everything had to be tested multiple times as changes were made along the way. We learned a lot of valuable information from our user testing and from user feedback, particularly in the early days of the Guide. Listening to our end-users is a strategy that has always served us well. We also built new functionalities into the stock Drupal triage module to handle our needs, the most important of which was the ability to build complex organizational criteria. Building these criteria is how the Guide deals with fine grained levels of sorting based on multiple individual characteristics. For instance, many programs will offer full representation to seniors who have a particular legal problem, while non-seniors with the same legal problem would be referred to CALL for advice and brief service. We had to build a system that could handle referrals based not just on county, income level and case type, but that may also lead to different results based on individual characteristics (age, presence of domestic violence, etc.).

To address the challenge of delays in other organizations' systems with which we were trying to integrate, we did what we could to build out the needed functions on our end, and then waited (and continue to wait) until they are ready to make the connection/integration. We also worked closely with the other organizations as both sides were building our tools to make sure the path to integration was clear throughout the development cycle.

To assist with building the logic trees, we started with logic tree samples from other states that had created triage systems before Michigan. The team met together to brainstorm and then met with the committee of legal services providers who gave valuable feedback and helped us expand the trees and phrase questions and options in ways that end-users would recognize. To help the programs understand what was needed on their end to facilitate referrals, we created a system that was repeated for each organization. A full list of end points was created and shared with the organization representatives ahead of time, so they could study it. An MLH

staff attorney then met with them via webinar and they went through the list together, and discussed for each case type whether the organization wanted the cases to be sent to CALL for advice and brief service, to be sent to CALL for screening, to be sent directly to the legal aid organization for intake (typically cases not needing screening; for example, public benefit terminations, public housing evictions, or emergency cases, like lockouts), or not referred to legal services at all. These conversations took several hours, but the benefit was that the legal aid organizations truly understood what we were doing, and we maximized the chances that the Guide is effective in steering people to the right place the first time.

Sometimes there were multiple organizations offering the same services in the same area, and we had to make tough decisions on what referrals to include and how to order them (since many people only look at the top referral). For the two LSC organizations that overlap in service area, we divided up that service area and for some counties, organization A is on top, and for others, organization B is at the top of the list. This weighting is based on where the organizations have the biggest offices and the most staff capacity. For other organizations with overlapping services, we reduced the types of referrals to send to certain organizations to minimize the overlap in services (thereby maximizing the availability of resources to end-users based on each organization's overall capacity to handle referrals).

We haven't yet found solutions for some of the other challenges listed above. The challenge of helping people identify their legal problems is not one that is easy to solve; we are hopeful that other projects working to incorporate AI to build better natural language searches may help bridge this gap. We have expanded our logic trees where it is clear that this will help, but it only helps solve a small part of the problem. We placed the "I have another {case type} legal issue" at the end of the logic trees, hoping that people will identify with another choice instead, but that also hasn't made much of a difference in the number of people selecting those options.

We are still working on how to drive more people to the Guide, particularly on mobile. We are working on a pop-up option for the mobile version of the Guide that is not off-putting to users. We continue to struggle with learning how to fully maintain the Guide on our own, without help from our contract developer, but that was made more challenging by a staff change within MLH. We are working on creating documentation to make this easier; we have already created a lot of documentation on how MLH staff do administrative tasks within the Guide, but need to work more on the programming end.

VII. Major Lessons and Recommendations

We felt that this project was very successful in how it was carried out, so a major lesson and recommendation is to follow the steps we took to gather input from crucial partners; involve

them in all stages of planning; build upon work already done in the sector; engage in user testing early and often; work to expand the functionality to meet your needs; take adequate time to fully develop and test all aspects of the project, to debug before launch, and to continually gather and respond to data and feedback. These all served us well.

Nonetheless, there are things we would have done differently and things we hope to change going forward. Namely,

- We recommend finding a way to drive more traffic to the Guide to increase the usage. As part of this strategy, we hope to make the Guide more obvious on mobile devices, since most of MLH's users come from mobile devices.
- We recommend being strategic about what data to collect and how to collect it, and to create those data catchment systems from the start of the project. Think carefully about what data you need from other sources, and make sure that data is available. Look at data as early as possible, use this to refine what you are looking for and at, in addition to using it to refine your systems. As the triage system changes and grows, determine what other data points you want to collect and set up those analytics systems.
- We recommend creating a process manual at the beginning of the project, and update it as you go. The administrative interfaces are always the least well-designed part of any technology, so documentation is key in order to remember how to use them.
- We recommend getting system documentation from all contractors so in-house staff can easily provide ongoing maintenance, upgrades, modifications, and fixes.
- We learned the importance of creating a "none of the above" option in the logic trees, since people legitimately have legal problems that can't fit into a specific category no matter how thorough and detailed the logic trees are. Then, find a way to give them useful resources (which is the harder part of this recommendation).
- Relatedly, develop a better system than the logic tree system to help people identify and categorize their legal needs.
- We recommend building a system that can be managed given the resources in the area. Michigan has fewer than 25 legal services providers, and this Guide design is perfect for this range. Many other states/areas have much larger or smaller universes of providers, which would require different systems.
- Keep meeting with project partners, even after the launch, to continue to make refinements based on feedback received from end users.
- A next step we hope to take with our Guide is to integrate a texting system that we can use to communicate with users both to get information about whether the information we gave them is useful (Did you follow up with legal aid? Did they take your case? Did

you file for divorce?) and also to provide additional help if they need it (Did you serve your divorce papers? If not, do you need additional help with service?).

- We hope to connect with Open Referral or 211 to build more and better community service referrals into the Guide without having to maintain these numerous resources.
- We hope to look closer at Pika CMS data, specifically levels of services for cases referred to legal services by triage, to learn more about how well the system works at making these referrals. It will take a few years to truly get good data in this area. Related to this, we plan to continue to meet with project partners regularly to evaluate and tweak systems.

We are very grateful to LSC for providing the funding that made this successful project become a reality, and look forward to continuing to evaluate and refine it into the future.

Appendices

- a. Survey results (Guide to Legal Help Survey; Final TIG survey)
- b. Description of technical components and functionalities/components of triage system

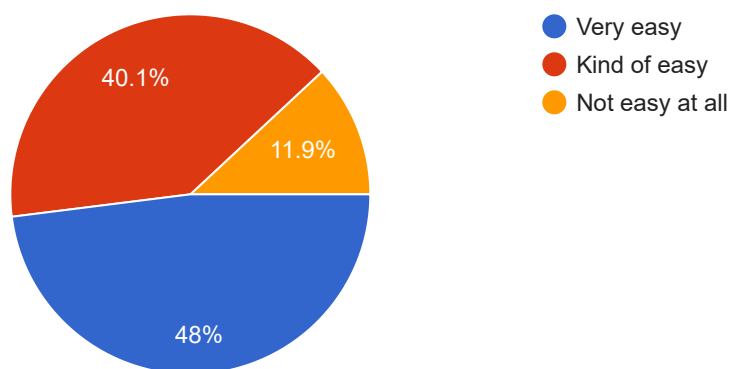


Guide to Legal Help - Tell Us What You Think

816 responses

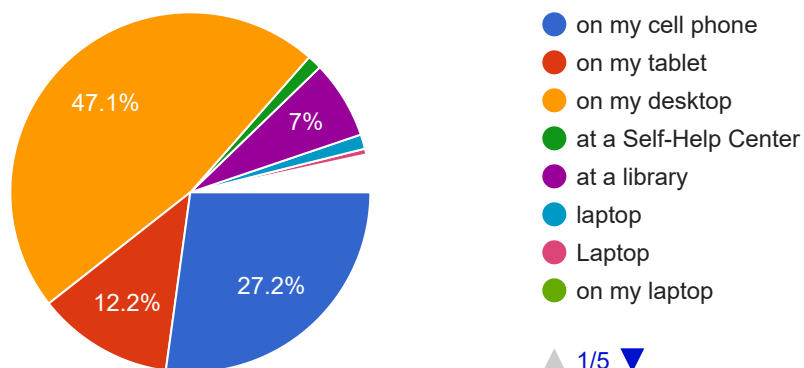
Was it easy to use the Guide to Legal Help?

779 responses



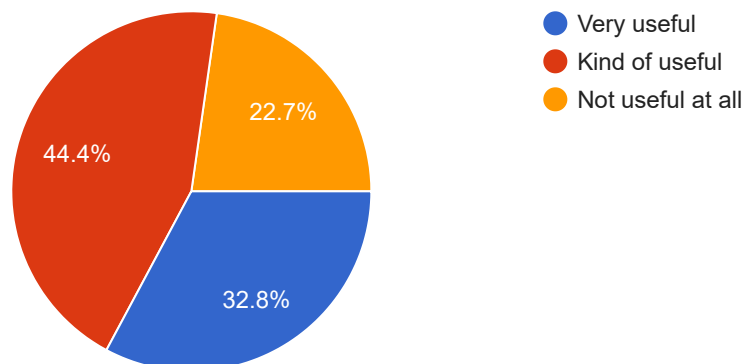
How did you access the Guide to Legal Help?

769 responses



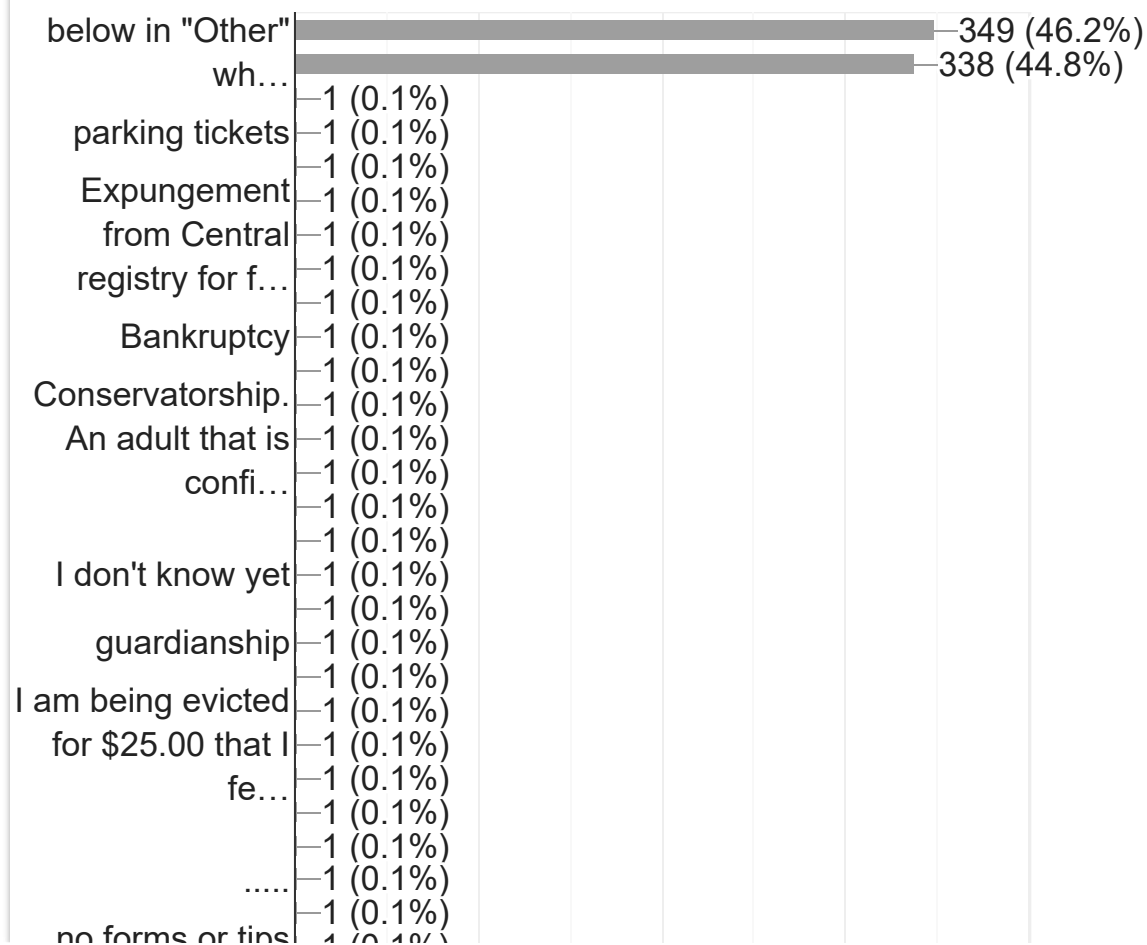
Was the Guide to Legal Help useful?

774 responses

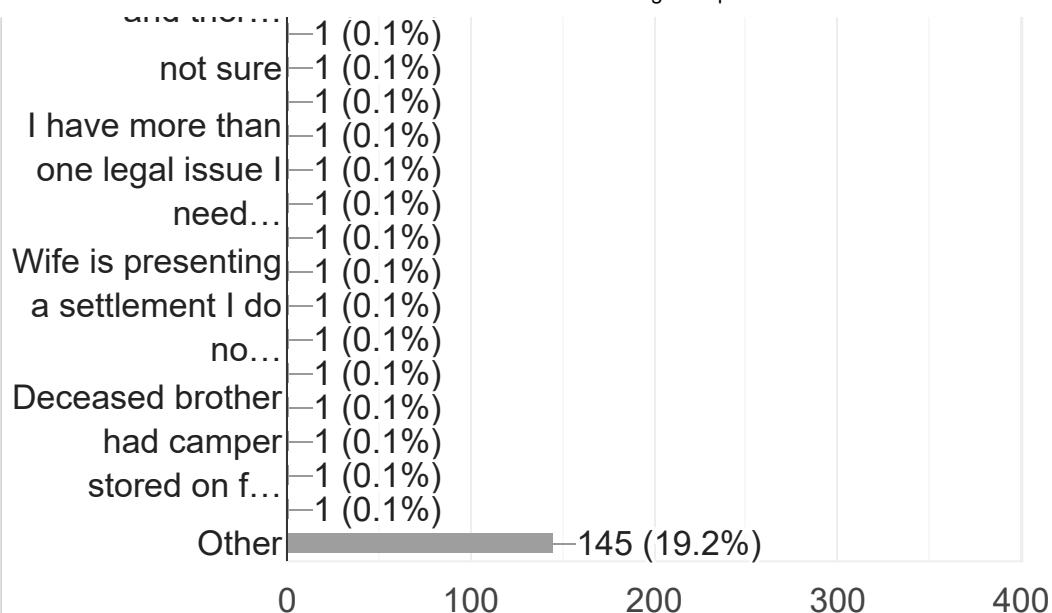


Did we have information and referrals for your legal problem?

755 responses

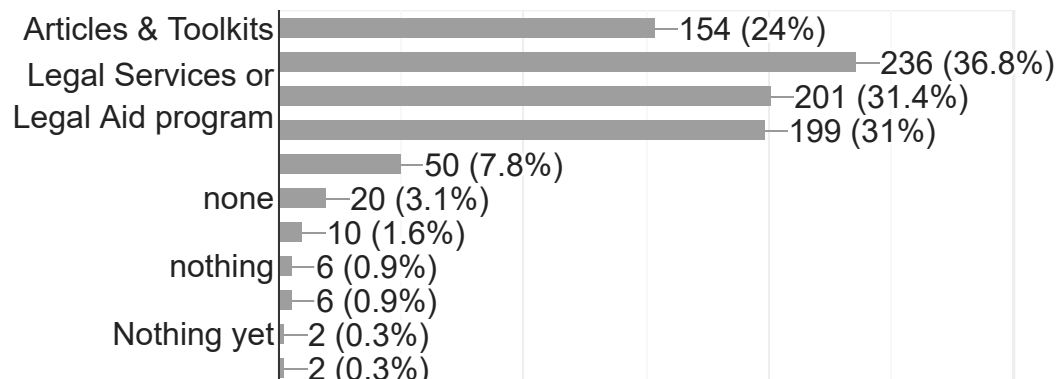


no terms or tips	1 (0.1%)
available for my	1 (0.1%)
legal...	1 (0.1%)
False clam agunst	1 (0.1%)
me for dimestic	1 (0.1%)
viola...	1 (0.1%)
kids are in a	1 (0.1%)
guardianship	1 (0.1%)
havent got any	1 (0.1%)
help yet	1 (0.1%)
I need a lawyer	1 (0.1%)
for a custody	1 (0.1%)
issue bec...	1 (0.1%)
We shall see...	1 (0.1%)
spouse is	1 (0.1%)
federally	1 (0.1%)
incarcerated an...	1 (0.1%)
the repy i got was	1 (0.1%)
sorry,we don,t	1 (0.1%)
have ...	1 (0.1%)
My alimony is	1 (0.1%)
finished and I	1 (0.1%)
have been ...	1 (0.1%)
Someone using	1 (0.1%)
my credit card	1 (0.1%)
Child custody	1 (0.1%)
Issue with another	1 (0.1%)
tenant that is	1 (0.1%)
break...	1 (0.1%)
I have a debt	1 (0.1%)
owed to the court,	1 (0.1%)
but I ...	1 (0.1%)
I received a	1 (0.1%)
demand for	1 (0.1%)
possession for ...	1 (0.1%)
mortgage fraud	1 (0.1%)
Legal aid is	1 (0.1%)
unable to help me	1 (0.1%)
and ther	1 (0.1%)

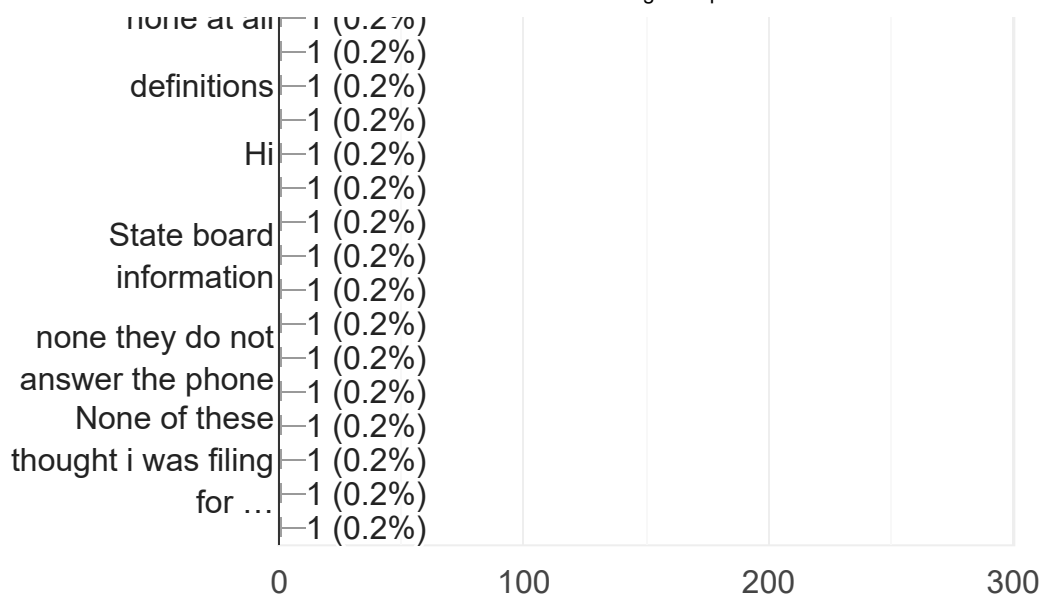


What results or referrals did you get from the Guide to Legal Help? Check all that apply.

641 responses

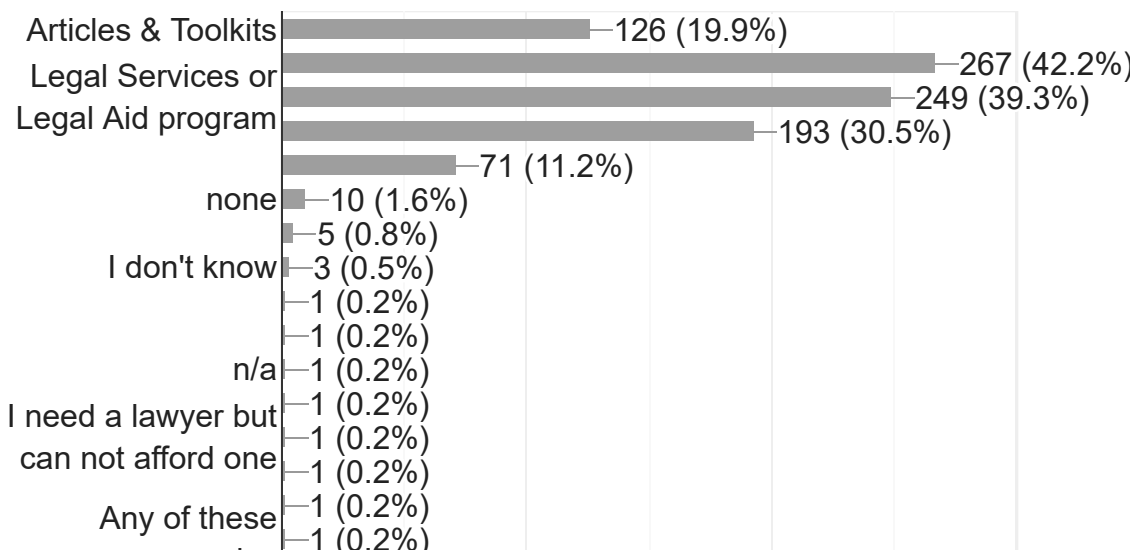


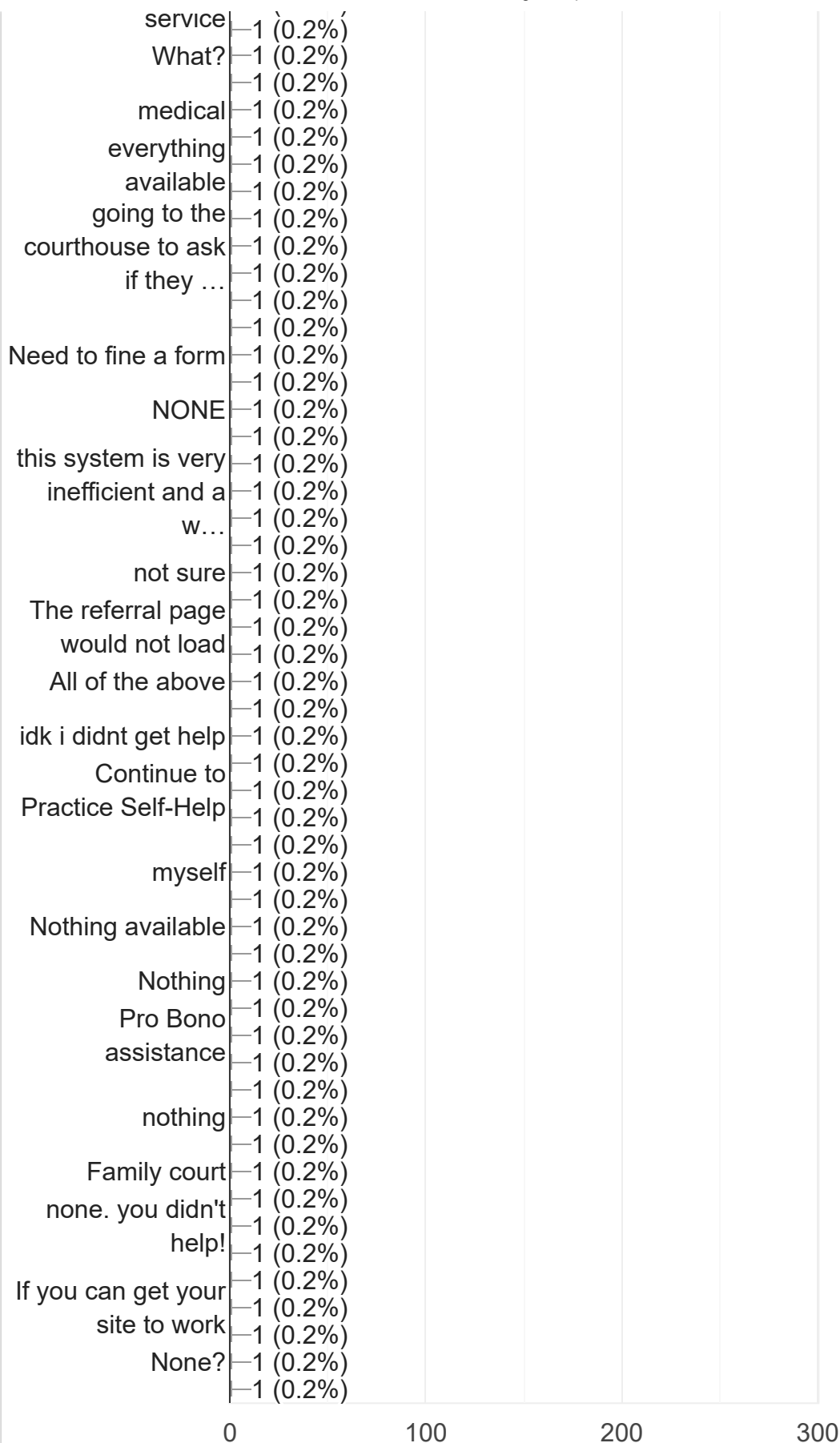
nothing yet	2 (0.3%)			
a phone number to	2 (0.3%)			
CALL	1 (0.2%)			
phone numbers	1 (0.2%)			
	1 (0.2%)			
I will call to find out	1 (0.2%)			
more	1 (0.2%)			
medical	1 (0.2%)			
	1 (0.2%)			
None as of yet	1 (0.2%)			
	1 (0.2%)			
NONE	1 (0.2%)			
I don't know where	1 (0.2%)			
to begin	1 (0.2%)			
im not sure if this	1 (0.2%)			
will help. i was	1 (0.2%)			
ho...	1 (0.2%)			
	1 (0.2%)			
This survey	1 (0.2%)			
	1 (0.2%)			
no help was	1 (0.2%)			
available for full	1 (0.2%)			
legal gu...	1 (0.2%)			
	1 (0.2%)			
None of the above.	1 (0.2%)			
	1 (0.2%)			
Still working on it	1 (0.2%)			
	1 (0.2%)			
Lawyer	1 (0.2%)			
Looking into	1 (0.2%)			
options	1 (0.2%)			
	1 (0.2%)			
I rent a lot in a	1 (0.2%)			
mobile home park.	1 (0.2%)			
not what i needed	1 (0.2%)			
got this	1 (0.2%)			
questionare	1 (0.2%)			
	1 (0.2%)			
Nothing for Small	1 (0.2%)			
Claims Court	1 (0.2%)			
I got "no results"	1 (0.2%)			
	1 (0.2%)			
Nothing! No	1 (0.2%)			
Information!	1 (0.2%)			
noine	1 (0.2%)			
I did not receive	1 (0.2%)			
any	1 (0.2%)			
mom	1 (0.2%)			
	1 (0.2%)			
	1 (0.2%)			
none at all	1 (0.2%)			



Which of these options will you use?

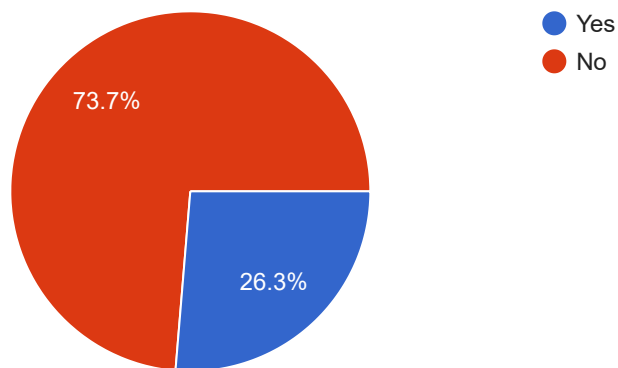
633 responses





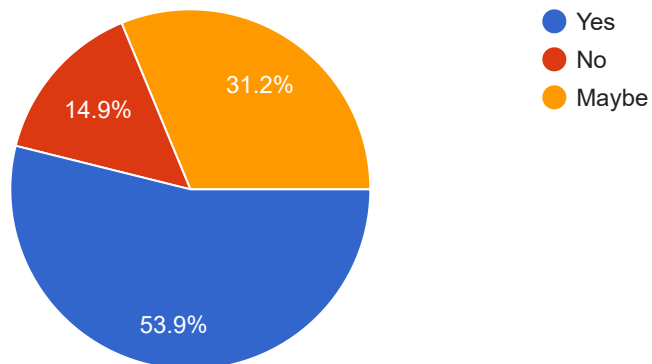
Did you use the Guide to Legal Help more than once?

722 responses

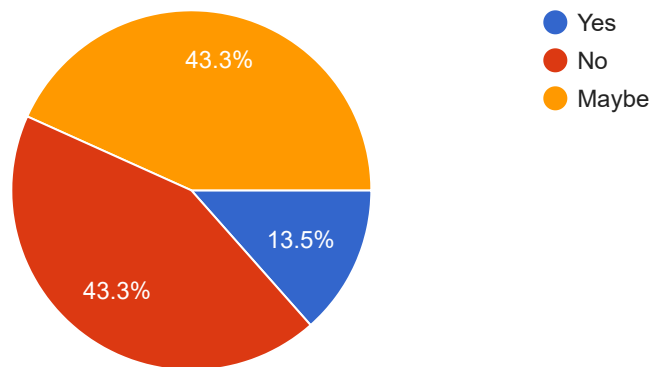


Would you use the Guide to Legal Help again, or recommend it to a friend?

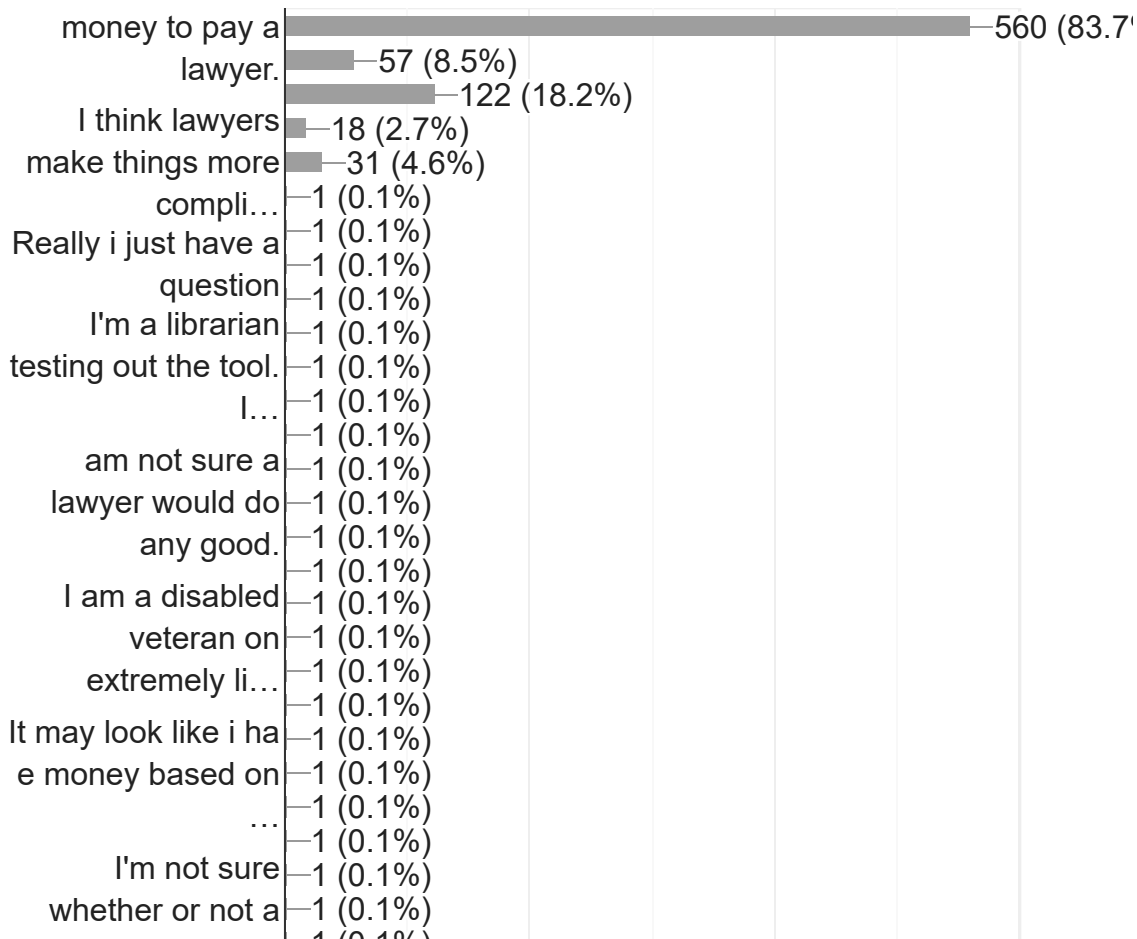
733 responses

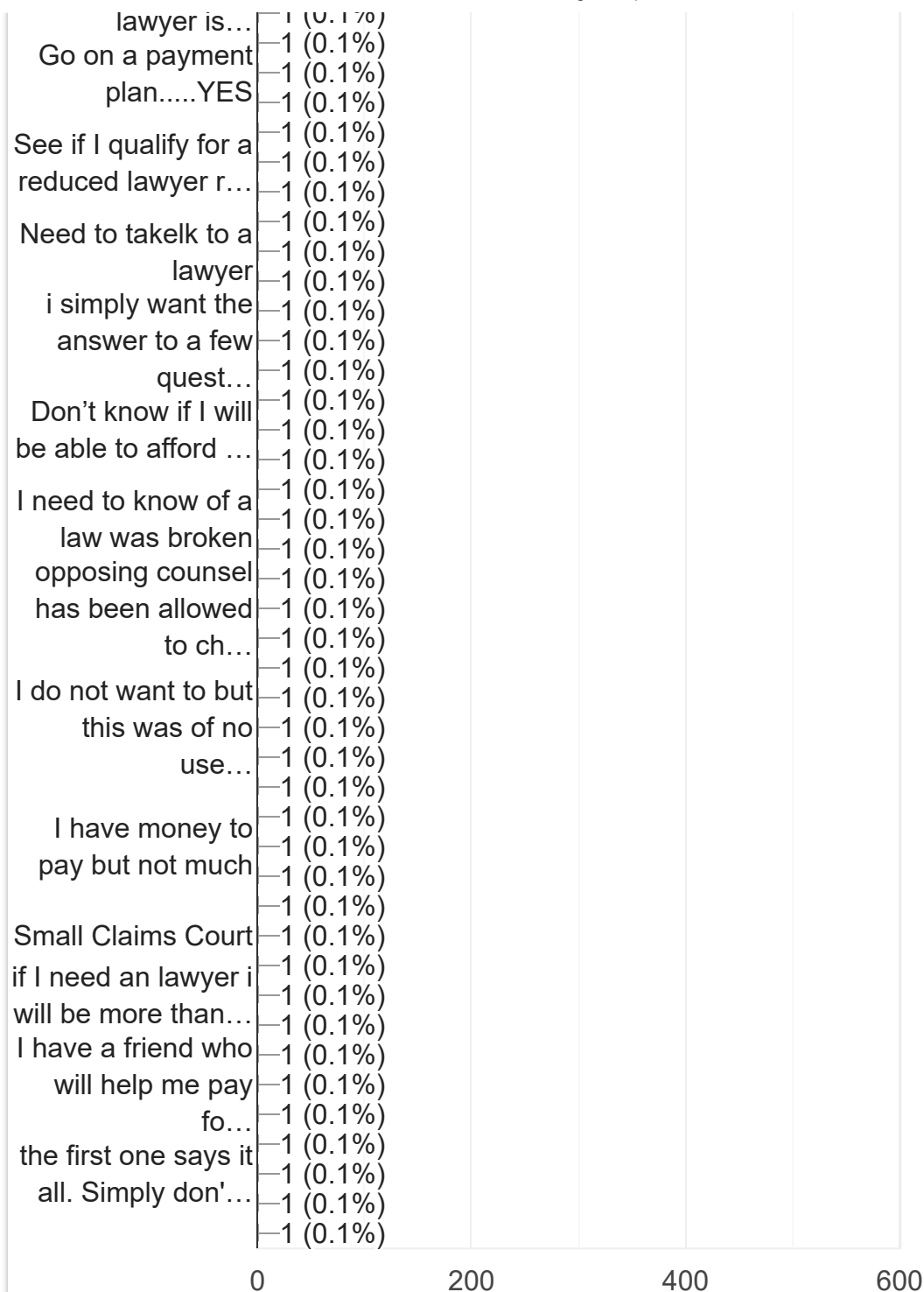


735 responses



669 responses





Is there anything else you'd like to tell us about your experience with the Guide to Legal Help? We're sorry, but we can't answer legal questions written here.

179 responses

no

No

Thanks

I wish you had someone here on the weekends to chat

I believe I'm able to win my expungement if I had a lawyer

I couldn't find the specific help I require. I want to know if a spouse becomes incapacitate how I can protect my resources from being used to qualify for medicaid.

Under the "housing" topical section, you don't have fair housing issues.

The state of Michigan DOES NOT care for its citizens! I'm going to have to file bankruptcy and I can not afford a lawyer but do the politicians care?! I think NOT!

I wish you provided a phone number to contact this service.

I don't have any were else to and I have a 2 year old and a baby on the way

No, not really

I apply for ssi

I know that I am entitled to free representation concerning discrimination as a tenant and because of my age, 67 in Michigan from Legal Aid

I was looking for process (and forms) to submit a case to get in front of a judge - why don't you have this???
Need help e03061@att.net

difficult to use. Nothing provided regarding guardianships even though listed

need original birth certificate, not live birth certificate. My e-mail is sfrancel@gnail. dob 8/14/47

could be a better website

SOMEONE should call to prove that this info was at least receive and provide HOPE

I will let you know after consultation. My email address; regt51hotmail@yahoo.com

I'm a librarian and was testing the service so I can recommend it to patrons. Big thanks to everyone who worked on this - it's a fabulous tool. I will definitely recommend it to our patrons.

how to get a dna case started to establish paternity for fathers rights. thx matt s 5869144787

Yes, you should have more Legal reasons listed for a tenant to use for breaking a lease.

none

we need a lawyer who would be willing to work with us or my sons life is over. we want a lawyer who is more interested in justice than money!

Should have more legal aid information or attorneys who might do certain things pro-bono.

I just need assistance getting my child enrolled in school. We are technically homeless at this time.

Carolphillips269@gmail.com

None

I think that you should have a broader perspective of questions for various situations. This site was a waste of my time!!!!

No not now

Too biased toward tenants and boarders

I was awesome very quick and easy .

did not provide any help

Why provide options that lead to the result: We do not have forms relating to this issues?? I want a simple Durable Power of Attorney for Health Care. That should be a standard form which could easily provide. Pretty pathetic, really.

It doesn't ask enough questions about needs. My granddaughter wants to stop visitation because of drug use at mom's living arrangements and mom just got out of jail on the 23 of December. She needs help.

advice on how to request an accommodation from my landlord

this was pretty worthless. I have been trying to establish paternity for 16 mos and have yet to get help anywhere

I need food , money and Prescription Help.

I have forms and information from the website, and I filed at the Macomb County clerk's office, but I need help in making sure I do things the correct and legal way. I need to physically TALK with someone.

thanks

I've had no experience with Guide to legal help.

this was a waste of time.

Happy so far.

is there a list of all available tools/articles? If so, it's not obviously noticeable

hayesmartin8@gmail.com

I am better off answering questions honestly after I go through the process using the tools provided.

I just wanted to know how to file a reaction to the ex parte order that I received and I did not get the answer to that except that I should contact a lawyer.

Please help us and direct us in the direction where someone will listen and care about our unfortunate encounter with a corrupt legal system

My apt.office said i was randomly selected to get an in-unit w/d. But that installment will eliminate my only in-unit storage and this will also double my rent at renewal time. Now I recently fell in the parking lot and broke my leg, for which I am filing a lawsuit and I am in the hospital/rehab right now.

Why does joint custody have to be so complicate that an attorney is "pushed" for by everyone in the court system??

Update yalls low cost lawyers

I would like to login and edit and chage imfor..

Need to help fathers when they want to establish paternity.

Yes I have no help my girl is disabled and we are about to be in the streets

I received no information what so ever

I wish you'd expand you knowledge to help people like me. (Parents who's children/child will not leave the home/nest). Or someone with no lease.

I would like to find information on my legal rights or be able to at least speak with a lawyer over the phone to see what I can do to protect myself.

These things are not easy or timely to use when you do not have any money. All divorce cases should have something in them concerning lay-off issues

yes get some real help form our tax dollars to help us seniors and low income!!!!!!!!!!!!

Charging me for 2 loans, I only got one along with years of interest.

I think you all should put more free lawyer help on hear thank you

You have no services for landlords, why? these are people that get taken advantage of just as much as some tenants. This was absolutely no help whatsoever.

No. Thanks for your help.

I don't understand why my mentally disabled daughter with an abusive husband cannot get any help.

Your website needs to stop taking people around in circles. If it says "click here for forms" that link should link to actual forms. It doesn't. Whoever provides the answers on this website needs to be fired as they are extremely unintelligent.

I need a Family practice and Criminal lawyer. One that does both if possible.

Been fighting this for about a year. Two management companies. Want the to pay security deposit on new place, pay for moving, pay for my cats to get full exam....being exposed to.bed bugs. Get out of MAP voucher and get into section 8 houing or income based housing. Finally pain and suffering for the crap and stall tactics.

I used this guide for my divorce, I got trampled in court and I have lost everything

I need some forms

Thank you for this service

Been here many times. With no help at all. Says it will help me get a lawyer now I get closer an she has a lawyer everyone helps her I get nothing all I want is to see my daughter

Everything seems to be in legal ease terms and is not for the common person, so I think that I may have to hire a lawyer to move forward which is an expense I was trying to avoid.

Only received maybe 6 payments in 18 years father lives in Texas this case is thru bay county and Texas

I need help.

i need help with an emergency injunction and change of custody

Just a Divorce

Some of your clients need to speak to someone to explain their problem.

Not at this time. Thank You.

I have lost all of my savings on lawyers who took my money and didn't help me, so they drained me dry. I think about all the money I lost. Now I'm penniless and can't get any legal help. I thought everyone was entitled to legal Representation isn't that the American way I'm extremely upset

I was hoping that your website could give me some, even a tiny bit of info. It was a total shot in the dark. Thank you for letting me try. I do truly appreciate it. 😊

Insite

yes you need an option for help when a roommate breaks lease early and u need help writing an agreement up that landlord has asked for.

This website is quite user friendly.

Yes - I'm trying to access my saved form for a will. It seems to have disappeared, but there is still the online reference.

Only that I'm Being harassed that's it

please contact me #@ 231-468-8926

this didn't help

I am so totall confused about everything

Calll me

Why no forms or 'help' for civil money & debt problems over \$6k ?

DIDNT GET ANY HELP

Very clear to the point questions and answers. First time visiting and think my situation and questions were taken care of.

Not at this time. Thank you

Well that's what i need is the answers. Or a copy of the family law to date and everything that stands in it

Not sure.

There are several issues not all related, it is complicated and I would like to talk about it.

how to fill out the forms

Thank you

My initial contact and follow up are and were great. From the front to the lawyer who did not make me feel like I was talked down to. Very nice and helped me. His name was Eric Weber. Absolutely great.

Why is it so hard to find a form??

[OTHER \(60\)](#)

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Google Forms

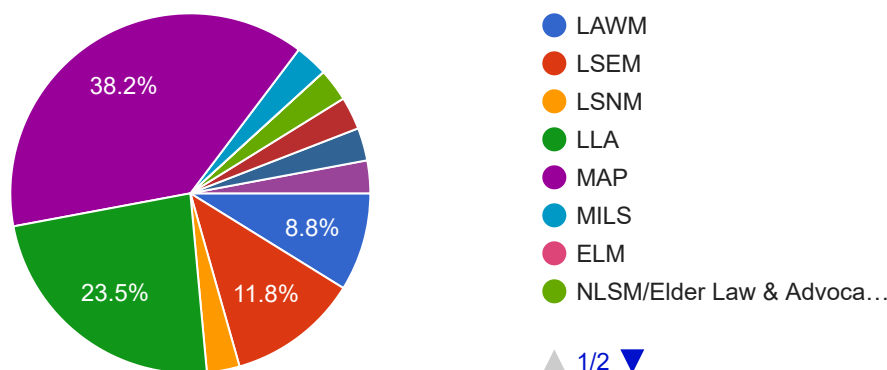


Guide to Legal Help - Statewide Survey

34 responses

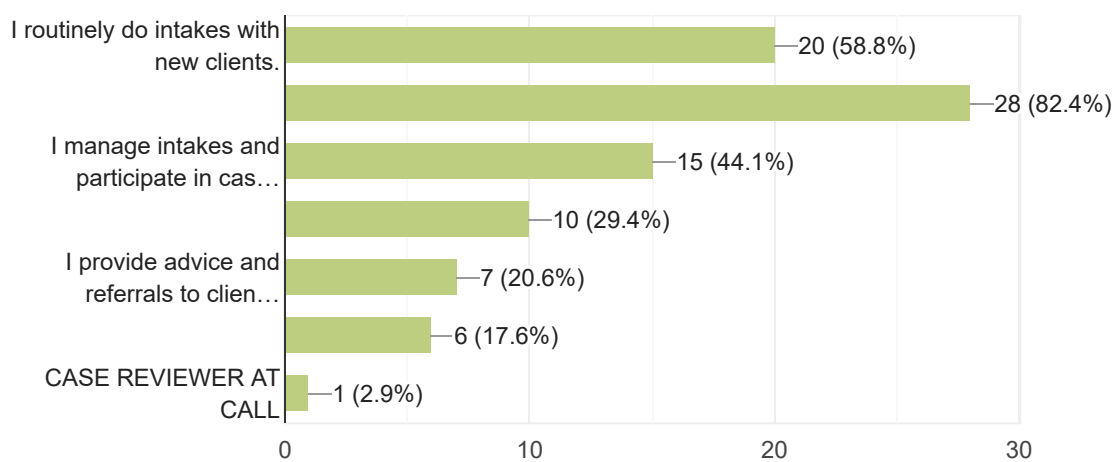
Please select your program.

34 responses



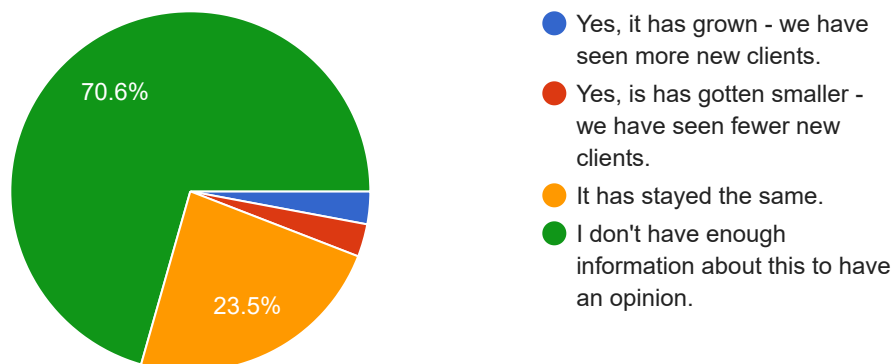
Please indicate your role(s) within your program. Select all that apply.

34 responses



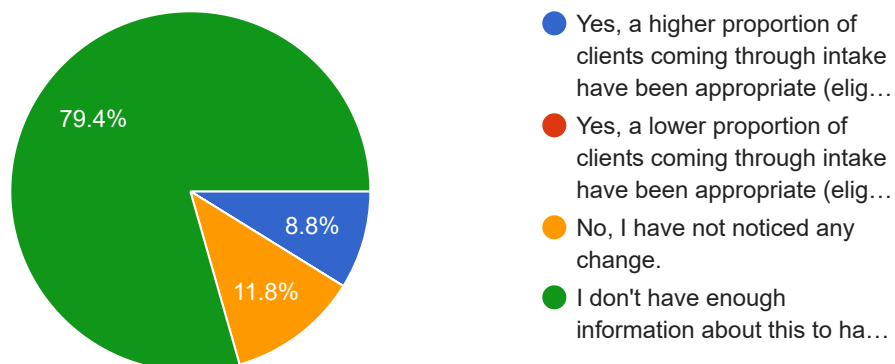
The Guide launched in October 2017. One of the things it does is direct people away from legal aid offices if they do not qualify, and if they do qualify, directs them to the most appropriate agency or office. From your perspective, has the volume of new clients coming to intake changed over time since the launch?

34 responses



From your perspective, has there been any change in the appropriateness of clients coming to intake since the launch of the Guide? Appropriate in this sense means eligible for your services and fitting within your case acceptance guidelines.

34 responses



Please share any comments you may have about the appropriateness of clients coming to your intake.

4 responses

Many of our calls come through "screeners" that do the initial part of intake so they may get screened out due to the nature of their legal issue (which we may not cover) before they get through to an attorney at CALL.

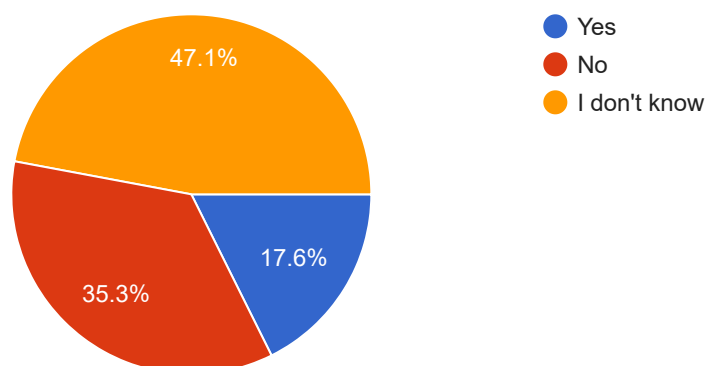
We do get a lot of clients that come into our online intake for issues we don't do: especially employment law and criminal law

The Statewide Intake Integration through CALL happened for us about this same time and may have impacted some of the factors.

CLIENTS CALL WITH LEGAL ISSUES, WE PRE-SCREEN AND IF NOT ELIGIBLE GIVE RESOURCES/PHONE NUMBERS

Do you collect information from new intake clients about whether they were referred to your organization through the Guide to Legal Help?

34 responses



If you do collect such information, approximately what portion of new clients at intake say they have been referred to you through the Guide?

7 responses

none

We collect the source of referral and no one has mentioned the guide.

A few but it is so hard to say and my perception is anecdotal

Not sure

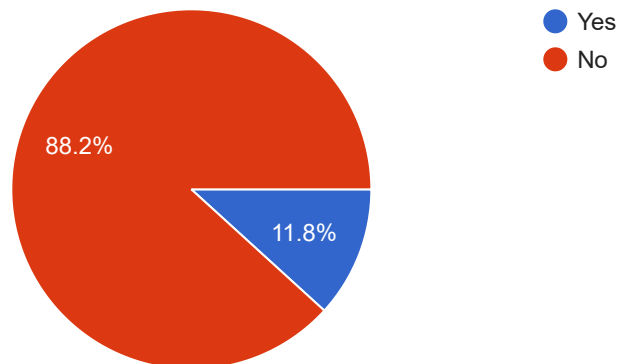
I have no way of knowing.

less than 20?

I don't know

Do you do intakes for clients who have submitted their application for legal services online?

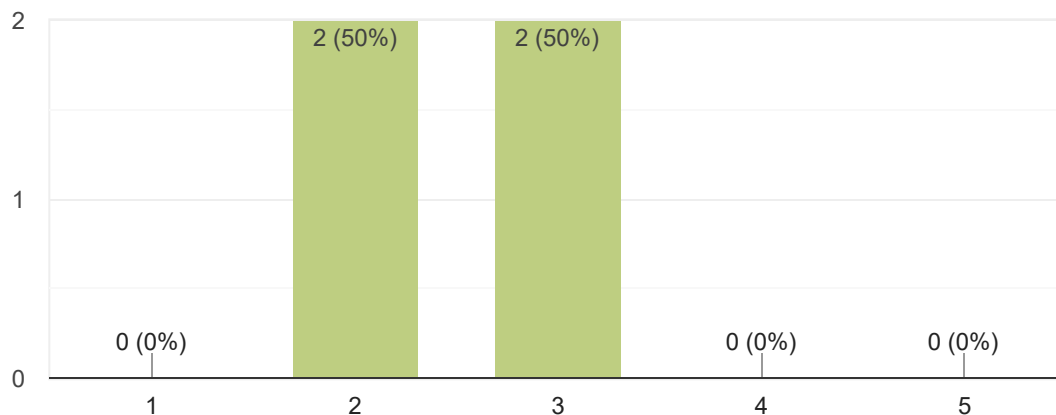
34 responses



Online Intake Questions

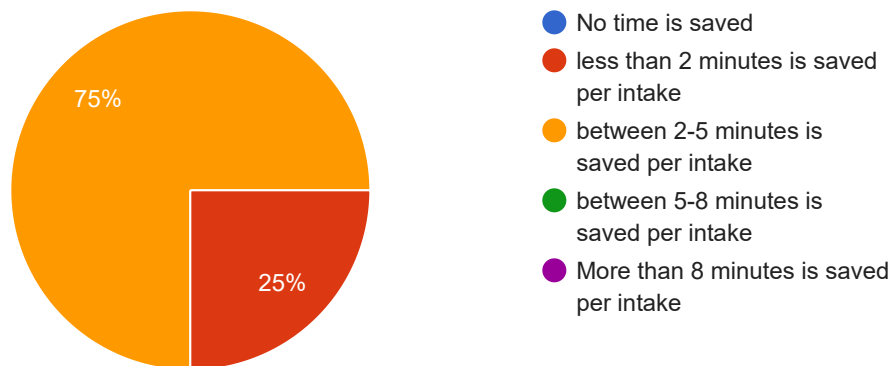
How much information that clients enter in the online application do you have to edit/fix when you speak to them?

4 responses



How much time is saved (per intake) when you are serving a client who submitted an online application as compared to someone who just calls in?

4 responses



Please share any comments you have about the accuracy and time savings that exist where clients submit applications online.

3 responses

I think that there is some time saved and more importantly more people become aware of our services because of the online intakes accessible at any time for them. However, often people are confused about who should count as a part of their home, what counts as income, the area of law the matter is in as well as the

legal goal. I don't know that much of that can be remedied but maybe a note regarding who counts as a member of the home or what counts as income may be helpful when we double check the information and move on, may save a bit on time as we do verify the information.

The social security # field does not work properly for our purposes. The info. about why clients need our help seems to always say the same thing so not too helpful.

Almost every client gets the question about car ownership wrong. It seems to be a really confusing question

Any last thoughts?

Please share any last thoughts you have about how the Guide to Legal Help and Online Intake (if in use in your program) have impacted your work.

6 responses

We find it helpful to provide an alternative to people who do not qualify however, we find a number of these people do not want to do it themselves - they feel afraid to do so and often reject this option.

I'm glad we are doing it and I am sure it helps, I just don't have the data to back up that thought.

Again it is another avenue to our services, which is a good thing for those in need even if we need to iron out some kinks.

N/A

NA

It has given us a trustworthy place to directly refer clients who are not eligible, not within our focus areas, or whom we do not have resources to assist. The advocate tools are useful and assist with case processing.

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Google Forms

TIG 15016: description of technical components and functionalities/capacities of system

- I. Steps 1-4 of triage (referred to as the “pre-questions”) ask the user to answer a set of simple personal questions designed to gather information essential to returning the most high quality information on the user’s triage “end-point.”
 - A. Determine whether user is here to help themselves or someone else; instructions if helping someone else
 - B. Screen in/out of MI; if out of MI, direct to <https://www.lsc.gov/what-legal-aid/find-legal-aid>
 - C. Determine county where legal problem is/will be, to give county-specific resources (if the user has already selected a county previously on the site the answer is pre-selected).
 - D. Determine top need of user: a lawyer, court forms, information about a legal problem, or not sure
 - E. Screen for user’s inclusion in groups for which specific legal services are available (minor, senior (two age categories), domestic violence, disability, veteran/service member, tribal member/tribal case, farmworker, homelessness risk, none of the above)
 - F. Rough household income screening by week, two weeks, month, or year; translated into percentage of FPL for eligibility purposes
 - G. Screening for receipt of benefits for which user may be qualified based on prior answers; info returned at end of triage if available benefits aren’t being received by user
 - H. Screening for “other factors” which help determine whether self-help or attorney referral is best for client; these answers plus top need identified by user (see D. above) determines order resources appear at end of triage. Factors are weighted between -2 to +2, and will either place find a lawyer referrals at top of results or self-help resources at top of results. Factors are:
 1. The other party has a lawyer.
 2. I have gotten some advice from a lawyer about my problem.
 3. I don't understand the paperwork I got about my problem.
 4. I don't feel comfortable talking to the other party in my case.
 5. I have a friend or family member who has experience with the same kind of legal problem I have, and they can help me.
 6. I have been to court before.
 7. I have done or will do research about my legal problem.

8. I think the other party and I could resolve some of our problems if we had a chance to sit down and talk about them.
9. The way this legal problem gets resolved will have a huge impact on my life.

Technical note: A user's answers are set as PHP session variables that persist through a user's browser session. These session variable will be cleared if a user closes their browser. We added a feature to clear the session variable when a user visits the home screen because so many of our users visit our site at self-help centers and libraries where browsers are not necessarily always closed from one user to the next.

- II. Step 5 of triage (referred to as the "logic tree") help users describe their legal problems. There are over 400 branches of the logic trees which allows the user to answer simple questions in a Q&A format that leads them to a specific triage "end-point" (see below) about which MLH has identified resources that can assist them. Help-text can be added at any point in the logic tree to assist a user with a specific question or answer in a given logic tree.

Technical note: The logic tree use Drupal's core taxonomy system to create the flexible nesting logic necessary to accommodate the logic for an unlimited variety of legal issues. The user interface is built using javascript so users remain on the same screen while they answer steps 1 - 5.

- III. Triage endpoints are the final After steps 1 - 5 of triage are completed the user is brought to a triage end-point page which returns appropriate resources from Michigan Legal Help (articles, toolkits, and DIY forms); referrals to legal aid and private bar resources (including phone or online intake for legal aid; referrals to specific offices or the statewide CALL hotline; state bar find a lawyer or lawyer referral, modest means, and Free Legal Answers platforms); local lawyer referral services; law school clinics); mediation resources (mediation centers and ODR); domestic violence resources; and other resources (fair housing centers, foreclosure housing counselors, etc.) All of these resources are carefully mapped according to each legal services office's dictates for how cases should be directed (to intake, to CALL, away from both), eligible income levels for each, specialized services based on population group identified (seniors, minors, farmworkers, etc.), and user's county. All users get all relevant resources (Forms, Information, Find a Lawyer, other referrals) but order is determined as described above. Users are able to return to their triage end-point at any point by clicking the "Legal Help Results" button in the navigation bar.

Technical note: triage end-point blocks can be added to specific end-points by creating "search blocks" that search for specific nodes based on their type and detailed field data and "reusable text" which are mapped to triage end-points directly without reference to specific nodes. All of the programming for the creation and mapping of these end-point blocks is done in a custom Drupal module shared on Github as part of this report.

- IV. Other navigational components

- A. On-ramps to triage: users can access triage in several ways. There is a link on the home page in a GIF. There is a button in the header on every page. If a user selects a subject area by button or drop-down menu, or does a search within the site, the Guide is the top choice with a button that says “Guide to [subject area/search term]. Get guided help for [subject area/search term] issues. Finally, if a user is reading a piece of content for more than 5 seconds, a pop-up window appears that says, “Can we help you? You seem to be interested in issues around [subject area].” Once the Guide has been completed, these buttons change to say, “Legal Help Results” (returning user to their Guide results page) and the pop-up window no longer appears.
- B. Find a lawyer: a very popular feature, this used to link people to a list of all possible legal aid and private bar (state and local) resources. Now, it links to the Guide. Once the Guide is complete, this feature (which is part of every content page) lists only the resources that were referred to the user through the Guide.
- C. Ability to do a second run, start over: Upon completing the Guide, users can click “Start Over” and they are returned to step 5, so they can select a different legal problem. In theory, they shouldn’t need to change any of their eligibility criteria, but if they do need to change that, they can click “Start Again” on this page and they are routed back to Step 1. However, their prior answers remain filled in until changed.
- D. Resetting upon going home: Consistent with typical website behavior, and for security/privacy of users, returning to the home page clears all answers entered into the Guide, allowing a new user at a public computer to start fresh even if the prior user left their session available on the computer.

V. Integration with other systems

- A. Online intake: All LSC-funded programs in Michigan use the Pika CMS, so the Guide is linked to online intake through Pika. Online intake is presented as an option to anyone who is determined to be eligible for legal services and who has a case type their local legal aid program or the statewide hotline has identified as one to send to intake. The following variables are carried over into the intake application for the appropriate legal aid org to which the user was referred, preventing the user from have to enter it again: problem code (matched with the legal problem they identified); existence of domestic violence; case county; inclusion in groups for which specific legal services are available (minor, senior (two age categories), domestic violence, disability, veteran/service member, tribal member/tribal case, farmworker, homelessness risk, none of the above); any “other factors” present. Income level is not transferred because more detailed income information is needed for online intake and that is more accurate than what is obtained through the Guide.

- B. State bar resources: although not functional at this time, the Guide was designed to integrate with both the state bar's Lawyer search feature and its lawyer referral service. The Guide is built to transfer the problem code and problem county to the State Bar search and referral service, so that the end-user doesn't have to repeat their search on the State Bar's website. If they need divorce help in Wayne County, when they click the link to the State Bar's resources, they will immediately see a list of available private divorce attorneys in Wayne County. This will require the addition of new subject matter areas beyond what MLH covers (e.g., torts, personal injury, intellectual property, etc.). Additional logic trees will be built out specifically for this purpose. These will appear on a second page of Step 5 so the users aren't overwhelmed by the number of choices.

VI. Back-end components/functionalities that were added to the stock Drupal module:

- A. Special criteria builder when there are special eligibility requirements (i.e., foreclosure case can be over 200% FPL; wills/POAs eligible for legal aid only if client is over age 60; etc.)
- B. Repeated text for non-legal referrals that needed to be tied to specific end-points.

VII. Routing of end-users to legal aid intake systems

- A. Each program decided to send cases directly to their local offices for intake, to CALL for screening, to CALL for advice/brief service, or away from legal services.
- B. For cases going to the local program, the org page for each office was used and appropriate triage end-points were assigned to that office, so users with matching case types would be routed there. Clients were told to call or use online intake where available.
- C. For cases going to CALL for advice/brief service, the CALL org page was used and appropriate triage end-points were assigned to CALL, so users with these case types would be routed to CALL's phone and online intake systems.
- D. For cases going to CALL for screening, new org pages for each office were created and named "[office name] - New Clients". Appropriate triage end-points were assigned to these offices so users with these case types would be told that their local legal aid office may be able to help them, but that they had to be screened through CALL first. They were routed to CALL's phone and online intake systems.

VIII. Maintenance

- A. Technical: while the Guide was primarily built by a contractor, day-to-day maintenance is done by MLH staff with some support from the contractor.
- B. Program criteria changes: A Google Form survey was built and distributed to all LSC programs so they can submit change requests when their office

priorities/grants/personnel changes such that they need to change what types of cases are directed to their intake. This survey is monitored by MLH's administrative assistant, who routes change requests to the appropriate staff person who will make the changes to the logic tree and referral system.

- C. New content on MLH: whenever new content is added to MLH, the staff person responsible for that content links it appropriate to the logic trees, and creates new logic trees if needed.

IX. Data Collection

- A. A Triage Summary report was built in to the Drupal triage module that tracks number of runs; number of people redirected because they are out of state; the number of people who leave without starting; the number of people who exit at each stage; the number of people directed to legal services and for what endpoints; the number of people choosing each of the variables at steps 1, 2, 3, 4, and 5; poverty levels; users per county; number of people directed to each endpoint; and the breakdown of what people want most (lawyer, forms, information, don't know) by legal topic area (family, housing, etc.).