

**LEGAL SERVICES CORPORATION
TECHNOLOGY INITIATIVE GRANT (TIG) PROGRAM
FINAL GRANT REPORT**

Grantee name: [Legal Aid of Western Ohio](#)

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Note: **Appendix A** of this report contains the approved final evaluation plan for this project.

I. Project Goals and Objectives

Goal / Objective 1 – Based on the previous Iowa Online A2J Intake Project TIG, create a web-based A2J intake module that enables Ohioans to request civil legal assistance on a 24/7 basis and integrate it with LAWO’s Pika Case Management System.

Note: LAWO already has an online intake system that accounts for approximately one-third (1/3) of all program intakes. This TIG project builds on lessons learned from the existing online intake system.

Goal / Objective 2 – Facilitate the ability for other Ohio legal services programs, as well as other programs from around the country, to replicate the online A2J intake module and to integrate A2J intake data with their respective program’s Pika case management system.



There were no significant changes in Objective 1 for this project. See Section VI of this report for lessons learned.

II. Evaluation Data and Methodologies

The methods and data collection defined in the evaluation plan were executed as planned, and included the following:

- A survey (executed by using Survey Monkey online) of legal services program intake and other appropriate staff regarding the development of the A2J online intake template questions. (Survey N = 8);
- A survey (executed by using Survey Monkey online) of IT staff regarding their A2J Author training experience. (Survey N = 2);
- A survey (executed by using Survey Monkey online) of public users who completed the online application. This ongoing survey is administered by program intake staff to online applicants on a voluntary basis. (Survey N = 1,273);

- Program Pika case management system data was used to track the number of applications processed. In addition, applicant demographic information, including zip code, is collected providing a basis to determine whether an applicant resides in a rural or urban part of the area served by the program;
- Administrative data from the Ohio Legal Services website using Google Analytics was used to track the “traffic” on the A2J online application from the website;
- Program historical, quality control and service delivery analysis data was used to review historical access trends for online intake and to compare historical trends for online intake, telephone intake and walk-in intake;
- For project management – The project manager used OLAF’s issue tracker system (in addition to Microsoft Office products such as Word, Project, Excel, Powerpoint and Outlook) to manage details, communications, tasks and files associated with the project.

III. Summary of Major Accomplishments, Recommendations and Future Steps

Summary of Major Project Accomplishments:

- **Created an A2J online intake application and integrated it directly with the program’s Pika case management system, something never done by any other program in the country.** The application includes the ability for the program to check for potential conflicts BEFORE the application data is accepted into the Pika case management system and populates its data fields.

On August 31, 2009 at 8:57 a.m., LAWO, in collaboration with Legal Aid Line, a joint project of LAWO and Advocates for Basic Legal Equality, Inc. (ABLE), officially launched the new A2J online intake application via the “Apply for Help” link available from the www.lawo.org website, or from the www.legalaidline.org website.

While the A2J online intake system is innovative, it should be noted that prior to the development and launch of the new A2J online intake module, LAWO’s intake system was using a previously developed online intake application system. The prior system, launched in 2004, had been in use for approximately five (5) years. The previous system was (and, for Spanish speaking applicants, continues to be), one of the three primary ways for applicants to access legal services. See **Appendix B – Previous Legal Aid Line Online Intake System** for reference. The program’s access points include: (1) the telephone, (2) walk-ins, and (3) online via the web.

Since the original launch of the previous system, online applications have grown to nearly 33% of all intake traffic¹. This trend appears to be continuing with a total of 3,448 of 9,697 total applications submitted through May 31, 2010.

Of the 3,448 online intake applications submitted through May 31, 2010, 218 (or approximately 6%) have been determined to be conflicts for the program. By comparison, 658, or approximately 10% of all telephone and walk-in applicants for the same time period, have been determined to be conflicts.

¹ A total of 11,000 intakes were taken in 2008 with 33% coming from online applications.

Access to legal services provided by the A2J online intake application continues to demonstrate and support the ways in which the use of technology levels the playing field between rural and urban applicants for legal services. Online access to the application process continues to demonstrate a significant impact on historical geographic barriers to access to legal services. In addition, the number of applications received from rural versus urban counties breaks down to 1,445 urban (or 41%) versus 2,003 rural (59%), a trend that remains consistent with the previous online system's success.

The success of the project is due, in part, to the vision, hard work, support and mentorship of LAWO Executive Director Kevin Mulder and Deputy Director for Advocacy Ed Marks; the leadership of Legal Aid Line Managing Attorney Debra Jennings and several Legal Aid Line Intake Staff members, particularly, Sally Rumbaugh; as well as ABLE's IT Director Will Shryock, and staff members Teresa Green and Tina Webster.

Supporters and contributors to the project included Eve Ricaurte (Iowa Legal Services), Rachel Medina (NTAP), John Mayer (CALI), Ty Acker and Cynthia Vaughn (OLAF).

- **Integrated problem content for applicants to utilize while waiting for a response to their service request.**

The new A2J online intake application continues using the previously developed integration with the program's ClientsWin "bounceback" information system. ClientsWin is a software program which provides county specific and legal issue specific information for an applicant to use while they are waiting to hear from Legal Aid Line. They receive the information upon the submission of their online application.

- **Shared development information for other programs who wish to create their own version of A2J online intake.**

The sharing of information and documentation for A2J online intake system building was facilitated through a variety of vehicles including GoToMeeting and Webinar (announced by NTAP and publicized through peer networking), presentations at both the TIG and NLADA conferences, and by the posting of project materials to the A2J Author website. In addition, several direct phone consultations between program executive and IT staff were provided (and continue today) by both Debra Jennings and Cynthia Vaughn. Finally, Rachel, Cynthia and Dina Nikitaides at Chicago Kent facilitate a monthly support call for all programs at various stages of A2J online intake development. The recordings for these monthly webinars are available on the A2J Author website under the online intake tab.

The process to build an A2J online intake system is documented in a step-by-step format document and can be found in **Appendix C – Introduction to A2J Online Intake** of this report. This document was shared with Ohio programs that expressed interest in developing their own A2J online intake templates. These programs were Community Legal Aid Services (CLAS), the Legal Aid Society of Cleveland (LASCLEV), the Legal Aid Society of Columbus (LASC) and Southeastern Ohio Legal Services (SEOLS).

For other states: See **Appendix D - List of Programs Who Requested Project Information** for more information about which states outside of Ohio requested information on how to build a similar system.

Recommendations

Any program that desires to implement an A2J online intake system should work from the strategic policy level first, or the “40,000 foot view”, versus building an A2J online intake template right away. This approach is encouraged to ensure that the organization (1) is aware of the potential impact of online intake on their existing systems, (2) understands that the concept of intake is more than a template; it is a fundamental component of extending service delivery to clients using technology in a purposeful, managed and clearly-articulated way, and (3) understands that online intake development is much more than a software application. In other words, the details to making the pieces work across the program need to be defined BEFORE the development of the template.

Project management continues to be a key component to the success of a project. There are an unlimited number of “styles” of project management; however, the most important traits of the person responsible for “herding the projects’ cats” include: (1) ability to effectively empower and engage staff at all levels; (2) seeing challenges that arise as an opportunity to creatively problem solve; (3) knowing how to keep both upper management and the funder abreast of changes in the project and the deliverable timeline; and (4) understanding that project management software is a tool to be used to facilitate project development rather than as a mere data recording tool.

Future Steps

LAWO has requested a TIG grant for 2010 to create a Spanish version of A2J online intake, which includes integrating language translation from within the A2J Author tool. If this grant award is made, LAWO will once again be in a trailblazer role for utilizing technology to provide access to legal services to the LEP population.

IV. In-Depth Analysis of Accomplishments

Objective 1 Evaluation Questions – The following provides answers to the evaluation questions and answers related to Objective 1.

Did the development and substantive expert team [intake staff] develop an effective flow of interview intake questions?

Yes. Several Go-To Meeting discussions regarding the interview script were held with various program intake and other staff over January, February and March 2008. Intake staff were included in discussions to ensure that their perspective was included in the phrasing of the questions.

Further, a survey was conducted (for this report) which asked staff to provide their thoughts on how they think the question development process worked. The results of the survey indicate that 100% of staff felt the process to develop the survey was effective, and that the questions target the information needed to facilitate the determination of eligibility for legal services as well as the identification of the applicant’s legal problem. See **Appendix E – Intake Interview Development Survey for Legal Aid Line Staff**.

Notably, an ongoing survey of public users of the online application indicates that more than 94% of users find the A2J application easy-to-use and that the same high number would recommend it to a friend, thus, supporting the effectiveness of the method and the ease of use. See **Appendix F – Public User Survey**.

To what extent did the A2J training enable ABLE IT staff to effectively develop and support the template?

IT staff member Teresa Green, Assistant Network and Database Administrator, obtained A2J Author training from Rachel Medina via GoToMeetings. Training included in-depth support for questions related to setting conditions and identifying variables to match the data collected in the program’s Pika case management system. This personalized instructional attention provided the support needed to effectively build the project template.

In addition, the project provided individualized training for staff at Columbus Legal Aid (Marcia Palof, Intake and Brief Services Director). To measure the effectiveness of this training, a survey was given to these staff to determine if they felt the training provided during the project was helpful. The results of the survey show that 100% of staff felt the training was effective; one respondent said the support they received was “invaluable”. See **Appendix G - A2J Author Training Survey – LAL and Columbus** for more detail for this survey.

What testing of the A2J template was conducted?

Using a combination of GoToMeetings and individual review, template testing by internal intake and other appropriate staff and the project team began on February 11, 2009 (see issue tracker email posting at right for communication) and continued through the launch of the system.

#139: 2009-02-11 07:34 (cvaughn)

Email to Internal Stakeholders group regarding testing - sent 2/11/09:

Good morning,
You may have already heard the good news, but just in case, the LAW0 A2J template is ready for internal project team testing. Please see the link below to test; the link is connected to the Pika test environment here at OLAF.
Link to the interview:
<http://pika.olaf.org/ablelawo/a2j/a2jViewer/>
This writes to the OLAF Pika test dev environment:
<http://pika.olaf.org/ablelawo/>
FEEDBACK: If you have comments, please "Reply All" to this email so that everyone can see it. We already know we need to address the following:
Drop in the LAW0 image in the background of the final interview
Move the ethnicity question to the beginning and then make sure the skin color of the avatar changes once ethnicity is selected.
We need to finalize the copy on the last page "Thank you".
We may also want to consider doing the recording of the interview and installing this with this version so that users can hear it, OR, we may wait on that piece since it is not essential to going "live".
NEXT STEPS – INTERNAL TEAM MEETING: We need to meet as a group to discuss the interview, collect feedback, and decide when we will open the testing up to the larger statewide stakeholders group. We also need to discuss the "mechanics" of how we will migrate from the current web-based system to the full A2J application (there are some policies related to technical issues that need to be worked out in terms of Pika).
Please let me know if you are available on the following dates and times. To keep things moving, we will go with the majority on the final date and time:
Wednesday, February 18 between 11:00 and 4:00
Thursday, February 19 between 11:00 and 1:00
Friday, February 20 anytime
Monday, February 23 between 2:00 and 4:00
Tuesday, February 24 anytime
Thanks in advance for your help.
Best,
Cynthia

Program intake and other appropriate staff were asked to test the template and provide feedback to the project team describing their template experience. Specifically, team and staff were instructed to read through the interview’s text copy for misspellings and flow of information (via the questions). The test user ID “Aaron Worley” and “Test” was used to track testing activities, a practice that continues to this day (using “Aaron” as a test for other programs alerts intake staff that someone in legal services is testing the interview, and that the interview should not be processed).

What changes were made in the A2J template based on the testing?

On February 13, 2009 and February 19, 2009, email threads that included feedback and suggested adjustments to the interview were shared with the project team. The changes made to the template and to the test Pika system included:

- Inserted Legal Aid Line and ABLE and LAW0 logos into the interview (versus the traditional court house image).
- Incorporated a link to the A2J application from the newly redesigned program website.
- Pika system adjustment: People entered as “children” in the A2J interview, appeared as “Client” in the Pika application.
- Pika system adjustment: The SS # for folks entered as “children” in the A2J interview did not appear on the information screen in the PIKA application.

- Pika system adjustment: The Court case number information collected in the A2J interview did not appear on the Case Information screen in the Pika application.

Note: Changes to the A2J online application template are made periodically based on the changing needs of users and intake staff.

Did the University of Michigan provide the Case Q code needed for Pika staging?

No. In May 2008, Benefo Ofosu-Benefo from the University of Michigan let the project manager know of the current status of Case Q. See the email below:

“Though Case Q is complete, numerous issues related to program-specific work flow and functional faults have hindered its implementation, as consecutive deployment attempts have not fared well. Accordingly, we are currently updating the application code to address concerns voiced by stakeholder programs. Barring further modifications, we will resolve these issues within two months and submit a requisite TIG evaluation report to LSCOPP, whereupon we intend to release the Case Q API.”

When the project manager learned of the development status of Case Q from Benefo, she suggested that the team consider using code that Ty Acker (Network Administrator for OLAF), had created for an unrelated Pika customization. The code worked as a solution for the conflict check staging table, which checks for conflicts with an incoming application without: (1) showing intake staff anything more than minimal identifying information relative to the applicant and the parties to the matter; and (2) populates case information fields in the program’s Pika case management system prior to official acceptance or rejection of a case.

Note: The customization of conflict checking code is specific to Pika.

Did CALI fulfill the contract to develop the XSL transform needed from the A2J template to Pika?

Yes. On November 17, 2008 John Mayer finished the development of the transform code based on the element report from the A2J interview, per the agreed contract between LAW0 and CALI (see **Appendix H – CALI Contract** as reference).

#104: 2008-11-17 10:32 (cvaughn)

Email from John dated 11/17/08:

 Attached is the latest transform that confirms to the 10-23-2008 intake interview. I ran several tests and all the important stuff works. There are some places where I have some questions, but these are pretty minor, so you should be able to put this in place and commence testing. Let me know if you have any problems with this.
 Thank you for your patience.
 John

Note: **Appendix C, page 6** contains a snapshot of what the transform look likes. Transform code (or “translation” between A2J and Pika) is used to insert the A2J interview information into Pika’s conflict check holding table.

When was the A2J online intake module implemented at LAW0?

The system was officially launched as a link from the www.lawolaw.org website and the www.legalaidline.org website on August 31, 2009 at 8:57 a.m.

When was the A2J intake module linked to the Ohio Legal Services Website?

On March 17, 2010 a link from the “Find Ohio Legal Help” online directory for ABLE and LAWO counties was incorporated into the Ohio Legal Services Website. The link is to www.legalaidline.org; a user can click on the “Get Legal Help” button on the top of the website, then select “Apply for Help”.

Since the link was incorporated into the OLS website directory (and as of June 4, 2010), there have been 53 outgoing clicks to the Legal Aid Line website². Note that the delay between the launch of the module on August 31, 2009 and the link available on the statewide website was a result of resource and budget availability for Kaivo support to integrate the functionality.

To what extent and in what ways did the A2J intake module enhance clients’ access to LAWO services?

The program has been providing an online application option to the public since 2004. The previous system utilized a custom designed ClientsWin software system, which provides an applicant with county and legal problem specific information and resources regarding their situation (while waiting for contact from the program). While the previous system (see screenshot at right) was effective, it was “content heavy”; print intensive and challenging to low literacy applicants.

The new A2J online intake application provides a more user friendly process for the online applicant by (1) presenting the questions in a logical and visually simple, step-by-step format; (2) offering a “Learn More” feature which answers anticipated requests for more information about a question; (3) enhancing the experience of low literacy applicants by providing a format that is easier to understand and navigate; (4) minimizing the amount of time the applicant must spend on the telephone with the Legal Aid Line Intake specialist to complete the application process – essentially converting an information gathering function to an information confirmation function; (5) offering the opportunity for the applicant to complete the application at a time when it is most convenient for them; (6) offering the opportunity for the applicant to complete the application at a time when all of the information needed is accessible to them.

To what extent did the A2J intake module increase the number of cases handled by LAWO?

The number of applications received through the new A2J online intake interview is currently running at approximately the same rate as the previous online interview system³. To reiterate, a total number of applications processed year-to-date (2010) is 3,448. In terms of demographic composition, the number of applications received from rural versus urban counties is the same as the previous online system.

To what extent and in what ways has the use of the online A2J intake module improved the efficiency of LAWO’s delivery of services to the public?

Legal Aid Line of Western Ohio

APPLY FOR HELP FROM LEGAL AID LINE OF WESTERN OHIO

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

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

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

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

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

WHAT COUNTY DO YOU LIVE IN?

Select County

APPLY FOR HELP NOW

² Source: Google Analytics on Ohio Legal Services Website at www.ohiolegalservices.org/public

³ Applications are tracked through the program’s Pika Case Management System

The A2J intake screens are available 24/7, making intake more accessible to clients who work during regular business hours. A2J users receive immediate county and legal problem specific information and resource screens with practical suggestions as to what they can do regarding their situation while they are waiting for a call from Legal Aid Line. The A2J online intake application and Pika case management system integration significantly reduces the time that intake staff must spend collecting basic client eligibility and issue data.

The A2J online application and Pika integration has resulted in a significant savings of time and has made the intake process more efficient. What was previously a three-step process is now a single-step process. It is estimated that the increased efficiency of the A2J online intake application and Pika integration has resulted in a time savings equivalent to 1.0 – 1.5 intake FTE's. What used to be received as an e-mail (which had to be copied and pasted into a separately created CMS client application) is now accomplished by the simple click of a button. By converting a data collection function to a data confirmation function, approximately 10 – 15 minutes of staff time per application is saved. By offering a platform where applicants can complete the application process when all of the necessary issue and eligibility is available to them, increased efficiency is realized through a decrease in the number of times an applicant must be re-contacted to complete the application process.

What additional efficiencies can be achieved by utilizing the A2J template for online intake?

The A2J template is easily customizable to address emerging issues or to pinpoint questions for applicants facing specific problem types or dealing with specified adverse parties. For example, foreclosure applicants who indicate their mortgage was issued by a lender known to be problematic can be given questions more detailed than applicants whose loans came from other lenders.

What operational issues resulted from housing the A2J template on the LAWO server rather than the NPADO (LawHelp Interactive) server?

The A2J online intake application runs on the same server as the program's Pika case management system. Because the A2J application runs locally (and does not output a HotDocs document), there was no need to create a HotDocs template or to connect it to LHI. This approach saves time in the management of the template (no uploading or testing to make sure it runs okay on LHI). Some minor modifications were required when installing the application on the server, as would be expected for this type of initiative.

Objective 2 – The following provides answers to the evaluation questions related to Objective 2.

What activities were conducted to publicize the lessons learned and other information about the project?

For Ohio – To facilitate collaborative communications with all Ohio programs, beginning on November 7, 2007, Debra Jennings, Managing Attorney for Legal Aid Line sent an email to all Ohio program executive directors announcing the beginning of the A2J Online Intake Application project. Debra's email requested direction from program directors as to who in their programs (in addition to IT staff) might be involved in the actual development of their programs' templates. Those identified were provided A2J Author training by NTAP on January 9, 2008.

It should be noted that programs were a bit hesitant about how A2J online intake might work in Ohio. On May 19, 2008, participating Ohio programs expressed to the project manager that they would not start their development until the Legal Aid Line project was closer to being launched so that any lessons learned could be applied, and the plan for program development could be adjusted accordingly.

Over the course of the project, and to keep the channels of communication open and project information flowing, the project manager proactively worked with each participating program in the development of their respective projects.

On March 11, 2009, Debra and Cynthia provided a demonstration of the draft Legal Aid Line template (as integrated with LAWO's test development environment in Pika) at the statewide intake task force meeting facilitated by the Ohio State Legal Services Association (OSLSA). This demonstration provided intake managers from across the state with a "first look" of the integrated system. As of this report, the Legal Aid Society of Columbus is the only other Ohio program with an active A2J online intake application.

What programs requested and were provided the system codes?

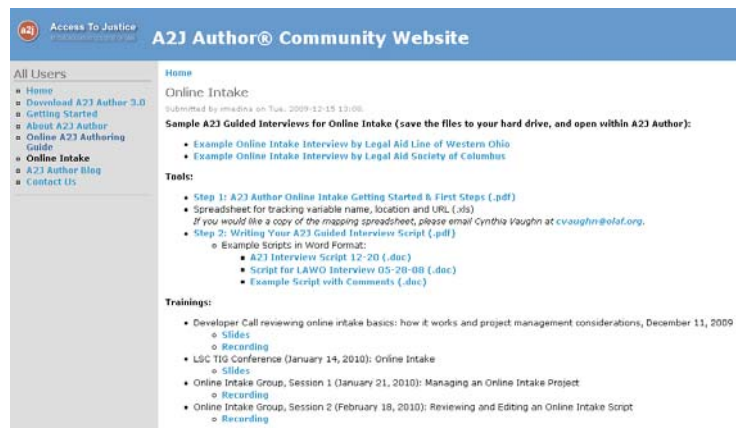
A total of twenty-four states have requested a copy of the LAWO A2J Online TIG application, the Legal Aid Line A2J Word script for the interview, and the Legal Aid Line A2J Author interview file; Columbus files have also been shared. Code and information that was requested was provided by the project manager via email. States who requested information include Alabama, Colorado, Kentucky, New Hampshire, Texas and Virginia. **A full list of the programs who requested information is included in Appendix D.**

For Other State Support – As part of the project's plan to support replication of the LAWO online intake initiative, on May 7, 2008, Cynthia provided a presentation at the Equal Justice Conference in Minneapolis. This presentation set the stage for word getting out to the national legal services community about Ohio's work.

Over the course of the project, Debra Jennings and Cynthia Vaughn have provided multiple phone and email consulting sessions to directors and other staff in programs across the country. Questions from other staff have ranged from the general flow of the interview template to questions about the conflict check process, eligibility management, issues pertaining to program intake practice, and procedure.

To Manage the Demand for Support

Needs - On December 15, 2009, Dina Nikitaides from Chicago Kent and Rachel Medina from NTAP created a new section on the A2J Author website to support legal services program development of A2J online intake (see www.a2jauthor.org). The website supports Ohio and other state programs interested in (and/or planning) A2J online intake projects while not overtaxing the time and resource commitment of ABLE, LAWO, NTAP and OLAF staff.



The website (see screenshot above) contains the A2J Author template files from the Legal Aid Line and Columbus intake projects, the Introduction to A2J Online Intake documentation created by the project manager, the presentation material from the TIG Conference 2010 on A2J online intake, as well as recorded trainings from the once-a-month GoToMeeting support sessions facilitated by Rachel Medina, Dina Nikitaides and Cynthia Vaughn.

Note: NTAP provides email announcements for A2J Author trainings all programs through their website and lstech listserv.

What legal services programs in Ohio requested the following information?

- Information and/or technical support for staff
- Staff training to create A2J templates
- Support in incorporating the module into programs' Pika test development (housed at OLAF)
- Support to incorporate the module into their Pika test development environment

The following are the participating A2J online intake programs in Ohio:

- Community Legal Aid Services, Inc. (CLAS)
- Legal Aid Society of Cleveland (LASCLEV)
- Legal Aid Society of Columbus (LASC)
- Southeast Ohio Legal Services (SEOLS)

For CLAS – On March 6, 2009, a GoToMeeting with program staff was held to launch work on the A2J online intake template for CLAS. The Legal Aid Line A2J script in Word and the latest version of the Legal Aid Line A2J interview were shared via email and were reviewed during the call. On March 9, 2010, the CLAS interview full element report was sent to John Mayer for development of the transform for the interview. Steven McGarrity from CLAS and Rachel Medina (NTAP) met on April 15, 2009 via GoToMeeting to review the A2J Author tool. As of this report, John just completed work on the transform; work with Pika integration (by Ty Acker at OLAF) will begin in July 2010.

For LASCLEV – On May 14, 2009, a GoToMeeting with program staff was held to launch work on the A2J online intake template for Cleveland. The Legal Aid Line A2J script in Word and the latest version of the Legal Aid Line A2J interview were shared via emailed and were reviewed during the call. A2J training was suggested by the project manager to Tom Mlakar from Cleveland and Garrick Lipscomb (IT Director) at Cleveland; however, it was agreed that training would be postponed until LASCLEV intake staff are able to develop their program interview. Script development is underway, but has been delayed due to internal staff resource issues.

For LASC – On March 20, 2009, a GoToMeeting with program staff was held to launch work on the A2J online intake template for Columbus. The Legal Aid Line A2J script in Word and the latest version of the Legal Aid Line A2J interview were shared via email and were reviewed during the call. On June 23, 2009, Marcia Palof from Columbus and Rachel Medina (NTAP) worked one-on-one on using the A2J Author tool to develop the Columbus template. On July 10, 2009 additional A2J Author training was provided to Marcia by Rachel.

On October 14, 2009, Columbus staff, the project team, Rachel and John Mayer (CALI) met to review the transform code and the variable spreadsheet for Columbus. It was at this time that a variable spreadsheet for development of transform code was integrated into the process for easier variable reference. On January 26, 2010, Ty Acker (OLAF) began the integration of the Columbus transform code in with the program's Pika test development environment at OLAF. Testing of the A2J template began January 28, 2010 and continued through February 2010. On March 1, 2010, Ty worked with Mike Means, IT Director for Columbus, to upload the template and Pika code into the Columbus Pika system.

On March 2, 2010 at 5:00 p.m., the Columbus A2J online intake template launched and is available via a link on the Columbus program website at <http://www.columbuslegalaid.org>.

For SEOLS – On March 20, 2009, an email notice from Jim Daniels at SEOLS was received by the project manager that the program was interested in participating in the development of an A2J online intake interview for the SEOLS program. The Legal Aid Line A2J script in Word and the latest version of the Legal Aid Line A2J interview were sent the same day to Jim Daniels via email. On December 2, 2009, the project manager provided a demonstration of the LAWO A2J online intake template to the SEOLS managing attorney group. On March 24, 2010, Michael Gibbons-Camp contacted the project manager about the development of the SEOLS template. As of the time of this report, SEOLS is developing a webpage form first (versus an A2J template) and will decide next steps at a future date.

What activities did the project conduct in response to Ohio’s legal services providers’ requests for services identified above?

The project team provided:

- Personalized instruction and step-by-step documentation on getting started with A2J online intake;
- Copies of Word-based interview scripts to use as a starting point for the development of their program’s interview. This is a tremendous time saving for programs because it’s easier to work from a beginning document versus starting from scratch;
- Support and training through NTAP (through GoToMeeting) for using A2J Author;
- Facilitated discussions with John Mayer regarding the creation of the programs’ transform code;
- Pika development support for the integration of the A2J interview and transform code into the program’s Pika system; and
- Ongoing monthly support for project management based on a program’s TIG grant schedule.

In terms of other state support, the project team provided the same kind of supports as what was provided to Ohio programs. As an example, below is an email from the executive director from Kansas Legal Services:

From Kansas Legal Services:

From: Marilyn Harp [mailto:harpm@klsinc.org]
Sent: Monday, June 07, 2010 5:03 PM
To: Cynthia Vaughn
Subject: RE: On line intake in A2J

Thanks to the great programming and logic you shared, we are to the testing stage for on line interviews for Kansas. Your help is much appreciated. The project is going much faster than we ever would have anticipated.

The ways and extent to which the system increased the quantity and / or improved the quality of services provided clients.

The increased efficiencies in the intake process have reduced the amount of time necessary to complete the application process. This has resulted in greater staff availability to a greater number of applicants and a quicker turnaround time for intake, assessment and response.

The ways and extent to which the system increased the efficiency and cost-effectiveness of the grantee's operations.

The A2J online application and Pika integration has resulted in a significant savings of time and has made the intake process more efficient. What was previously a three-step process is now a single-step process. It is estimated that the increased efficiency of the A2J online intake application and PIKA integration has resulted in a time savings equivalent to 1.0 – 1.5 intake FTE's. What used to be received as an e-mail which had to be copied and pasted into a separately created CMS client application, is now accomplished by the simple "click" of a button converting what used to be a two step process into a single step. By essentially converting a data collection function to a data confirmation function, approximately 10 – 15 minutes per application is save. By offering a platform where applicants can complete the application process when all of the necessary issue and eligibility is available to them, increased efficiency is realized in a decrease in the number of times an applicant must be re-contacted to complete the application process

Standards that you think should be established for systems or approaches of this type.

It is important to establish application review, conflict resolution, and applicant response time protocols. Even with appropriate cautions, applicants with deadlines will use the method to apply for legal services.

Appendix I – Legal Aid Line Online Application Process details the intake procedure for processing A2J online applications. This procedure has been integrated in with the program's overall intake process and provides programs with a framework by which to build their intake capabilities.

Specific evaluative information about your project that was identified by the LSC grant manager.

The evaluation plan (Appendix A) provided appropriate evaluation guidance for the management and data collection needed to assess the project. Please refer to the individual sections of this report for more information.

IV.a. Information for Multiyear or Multiple Projects: N/A

V. Factors affecting project accomplishments and strategies implemented to address major challenges

Factors Affecting the Project and Challenges Confronted on the Project

There were four significant events that impacted the project that were not (and could not) be anticipated:

- Staff illness and other team family issues – Schedule challenges occurred as a result of John Mayer's serious health concerns and his other project time commitments. John's work was absolutely key in completing the transform work for the project. The project could not have been successful without him. So the schedule was adjusted as necessary for John, as well as for other team members dealing with family concerns.
- Case Q was not developed as anticipated by the University of Michigan – At the outset of the project, it was anticipated that the conflict check code (known as Case Q) was going to be available for use on

the project. Due to unforeseen events, the code was not available. The project manager recognized that an address book customization in Pika that Ty Acker had developed for ABLE/LAWO could work for the conflict code component of the project. A test was run, and Ty incorporated the code into the test environment, allowing the project to progress without the Case Q code.

- The integration of the problem content for the ClientsWin software imported from LAWO's prior on-line intake system took longer than anticipated. The ClientsWin system provides resources and information to an applicant based on the problem code identified during the interview. The applicant will see this information after an A2J application is submitted. Its purpose is to help the applicant find other resources that could be helpful to them while they wait for a response from legal aid. The integration of this system with the A2J application took longer than anticipated. However, the team now knows how to incorporate a system like this, and will share this knowledge with other programs as the situation arises.
- All of Ohio's programs are autonomous and operate independently of each other. LAWO cannot (and could not) control the acceptance, speed of development, and/or launch of other program A2J online interviews. Further, not all of the programs have time and resources available to devote to starting and working on their respective projects as originally defined by TIG milestone requirements of this grant. As such, the project manager worked (and continues to work on an in-kind basis) collaboratively to assist programs as appropriate and as requested.

VI. Major lessons and recommendations

The following are the major lessons learned from this project:

- No matter how much planning goes into a project, issues will come up due to staff and other resources changes that will cause the project to go off schedule.
- A TIG grantee cannot control the rate of adoption of a technology innovation by another program no matter how good the idea may be, so do not include a milestone in the payment schedule that makes the program responsible for another program's implementation.
- The more complex the project, the higher rate of "scope gallop," meaning effective management of requirements and expectations is key to completing a project of this magnitude.
- There was no way to anticipate that A2J online intake would be in such high demand by programs across the country, specifically in terms of consulting and support (of other programs across the country) for how the project was implemented.
- When providing demonstrations of the A2J online intake project, you must have both the project manager and the intake staff expert (Debra) in the same place, at the same time because each brings a complementary component to the project.

Recommendations for other legal services programs that might implement a system/strategy of this type.

See Appendix I - Legal Aid Line Online Application Process

Recommendations for further development of this system and how they can be best adapted and used by other LSC grantees.

As the A2J system evolves, LAWO and other programs using A2J intake systems should develop A2J interview banks to better share interview templates and reduce the time needed to customize intake screens. The interview bank can be stored with the other supporting documentation available on the A2J Author.org website.

In addition, as usage increases it also may become necessary to develop a mobile web version for users who have internet access mainly through a cell phone or other mobile device.