

Project Biography

Online Guided Interview: Voluntary Administration of Estate Form (MCP-170)

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This document is my final Project Biography for the Fall 2020 Coding the Law course. This document describes the work done in each of the process and product categories.

Framing

The lack of 'Access to Justice' is a well recognized problem existing in our society today, whereby our justice system is so complex and time consuming that many people without the time or resources are left out of it entirely, without access to legal solutions. Even resolving simpler issues that don't require a trial or a legal battle can be insurmountable, because the knowledge of how to navigate the legal steps required is not widespread. Many legal aid nonprofits address the issue of getting legal services for those who may not be able to afford a costly attorney, but those organizations are frequently over stretched and the less essential problems can fall to the bottom of the priorities.

Probate is one common area of legal services that many people need, but not many people have sufficient knowledge about. Probate is the legal process of administering a person's estate after their death.

The Voluntary Administration of Estate Form is one way to gain access to a small estate without having to go through the more costly formal probate process.

Users for the Voluntary Administration of Estate Interview:

- Individuals filing on behalf of themselves (filer becomes Voluntary Personal Representative (VPR))
- Attorneys filing on behalf of a client (client becomes VPR)

Stakeholders:

- Probate Courts
- Other heirs or devisees
- Creditors or debtors
- Asset holders (banks, financial institutions, etc.)

Research

Extensive research was conducted prior to beginning coding of the Voluntary Administration form.

I began with the **court's websites** that post the form itself and existing instructions for completing it:

- <https://www.mass.gov/guides/file-a-voluntary-administration-for-an-estate>

Mass.gov also has a **page for all Probate and Family Court forms** for wills, estates, and trusts:

- <https://www.mass.gov/lists/probate-and-family-court-forms-for-wills-estates-and-trusts>

There are two relevant how-to documents and a checklist now saved to GitHub:

- [MPC-961 Instructions For Voluntary Administration](#)
- [MUJPC Estate Administration Procedural Guide –Second Edition](#)
- [MPC-965 Voluntary Administration Checklist](#)

Additionally, I searched the internet for **Massachusetts firms and practitioners** who post information about this form and their own advice on how to complete it, as well as contact information for anyone who wishes to hire a lawyer for assistance.

- <https://www.curleylawfirm.com/blog/2018/08/becoming-the-voluntary-administrator-of-your-loved-ones-estate/>
- <https://www.levinepirolaw.com/small-estate-no-problem/>
- <https://jrmccarthy-law.com/2018/03/29/poor-mans-probate-voluntary-administration/>
- https://www.attorneyhoyle.com/probate_law.html

Early on in the process I reached out to my Suffolk mentor who is an elder care attorney practicing in Massachusetts. He and I reviewed the form, and he gave me some tips and explained a few things, especially how the

- Notes from Initial Conversation with Ron Kearns

Ideation and Prototyping

Because this project is part of the Mass Access Document Assembly Line Project, technical solutions other than DocAssemble were not considered.

User Testing

User testing has begun, but will need to be completed before this interview can be released to the public. Testing was done with multiple edge cases, with multiple end users, as an attorney and as an end user, with between 0-5 assets and 0-4 interested parties.

- 11/30 - David Colorusso and team ([feedback session recorded](#) and on Youtube)
- 12/3 - Kellie Beaudoin (probate paralegal) (feedback form [on Github](#))
- 12/4 - Caroline Robinson (feedback form [on Github](#))
- 12/5 - Phil Christianson (lay user) (feedback forms [on Github](#))
- 12/8 - Anastashia Kamberidis (probate attorney) (feedback form [on Github](#))

- 12/14 - Kelly Guarino ([feedback session recorded](#) and on Youtube)

Issues have been created in the [GitHub Repo](#) for the feedback that has been suggested that I have not yet been able to implement..

Refinement

Multiple iterations of refinement happened both on the PDF field labels between October 13 - November 2, and to the DocAssemble project between running the wizard and the initial commit on November 2nd and the completion of this product.

PDF and Field Labels Iterations

- October 13, 2020 - Initial draft
- October 21, 2020 - Review Session with Aubrie Souza
- October 25, 2020 - Quentin added Decedent and Interested Party to Basic Questions Wizard
- November 2, 2020 - Final draft was run through Wizard

Docassemble Project Iterations

- November 2, 2020 - Initial code created by Wizard
- November 7, 2020 - Session with Caroline Robinson on question order and code
- November 7 to December 3 - Multiple (15+) commits with updates from self testing, help from channel, etc.
- December 3, 2020 - Session with Michelle to merge branches and create dev project
- December 14, 2020 - Session with Kelly Guarino on usability

Introduction Pitch

[Introduction Pitch](#) - Given to Professor Colarruso and class on October 19th.

Complexity/Robustness

This project involves non-trivial use of document automation. It guides the user through over 20 screens of questions with complicated branching logic and draws on code from other modules (docassemble.income.financial_statement.yml).

Impact & Efficiencies

This project has the prospect of greatly increasing the use of the relatively simple probate process of Voluntary Administration of Estate. Anecdotally, my father lost his son, my step brother, a few years ago. My brother died unexpectedly at 44, and rather than probate the estate during that difficult time, my father walked away from his son's last paychecks, and small checking account. This was not a great deal of money, but it could have lessened the debt that his son now carries after college. Had my father had access to this simple process it would have made a difference in the life of his grandson, and I hope that this project can keep families in need from walking away from decedent's assets in the future.

Documentation

The code follows comments conventions that will allow another coder to pick it up and make further changes before releasing the form. In addition to the code standards and the Github library I have prepared the following additional documentation to assist the next people to work on this project:

- The [Trello](#) card has been created and utilized and kept up to date. (Card is titled Voluntary Administration of Estate [Probate])
- There are [29 issues](#) that are fixes that the Document Assembly Line team can utilize as next steps.

Real World Viability

This project is a minimum viable product (MVP). It takes user input, and produces a PDF that can be submitted to the court. Not all of the functionality has been added that I would like to, but issues are created for the enhancements, and as-is this interview could be useful to the general public.

Sustainability

There is an incredibly talented Document Assembly Line team working on other forms and interviews who will take over ownership of this form. The set-up of the project centralized the code and documentation on [Github](#) so there is no complicated hand-off procedure that needs to be finalized. I will also be available to share progress and next steps if there is someone available to take the next steps. I would also like to continue to develop this interview if that is the best option and my schedule allows.

My partner, David Colarusso, has indicated that he will be providing a letter to himself that will summarize his level of satisfaction with the project and plans for its continued upkeep.