



# THE WILL CLINIC

## Software Requirement Documentation

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# 1 THE WILL CLINIC PROJECT PROPOSAL

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There is a need to provide military veterans and their families in our community with access to lawyers to provide both Power of Attorneys and Wills free of charge. Military veterans, both active and retired, put their lives on the line every day they are on duty. It is important for us to provide for them the most basic documentation. It is important for us to provide the peace of mind to the veterans themselves and their family members to know that they are taken care of if anything, whether on duty or retired, that they are taken care of as well as their families.

We should be providing these documents and services for free to these veterans because many times veterans and their families cannot always afford these services, or do not plan when they themselves are on duty, or if a loved one is deployed. Currently there are more than 1.4 million veterans that are living below the poverty line. We cannot expect these veterans and their families to be able to come up with the money that would typically accompany setting up such documentation. Allowing the veteran and the families themselves to have the confidence that they are being taken care of is the least we can do for the veteran community. There are hundreds of attorneys in Washington state that are eager to help this community and aid where it has been identified.

The features of this application include a web application where a veteran can fill out the basic information that will automatically connect them with a local lawyer who has signed up to volunteer their time to draft the appropriate documentation you are requesting. This application will include a record of every conversation that takes place between the client and attorney and will eventually convert all the information inputted into a legal document to finalize the process and the paperwork.

## 2 VISION

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The Will Clinic aids US Veterans and their families with resources such as Power of Attorneys, Health Care Directives, Estate Assistance, and Living Will services. This is a free of charge service aimed at helping those in our community who have served in the Armed Forces. The Will Clinic offers a streamlined workflow to match veterans in need with volunteer attorneys to finalize and notarize the required documentation to provide a piece of mind to both the Veteran and their loved ones.

## 3 SCOPE IN/OUT

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- Matching system that will find the volunteer attorney closest to the Veteran
- Provide an archive of saved wills attached to each veteran account
- Provide IP tracing of each user login to track where users are accessing the site
- Timer of how long each user spends on each questionnaire page
- Data Retention of 90 days after a will has officially been signed
- Two Factor Authentication to protect the accounts and security of the users.
- Web Based Application

The following will not be included in our buildout of the system

- Accounts of immediate family members whose spouses are deceased.

## 4 MAJOR FEATURES

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### VETERAN PROFILE

The Veterans will have their own profile that will contain information specific to them such as name, age, military branch, etc. Within the profile, the Veteran can open and complete applications to qualify for the Will Clinic services. The Veteran can access their saved and completed applications within their profile as well as see the lawyers assigned to their applications and the contact information of the Lawyer's offices.

### 4.1 VOLUNTEER LAWYER PROFILE

The Volunteer Lawyer will have their own profile that will contain information to them and their law office specifically. The Volunteer Lawyer will be notified when their CLE license is set to expire, and the ability to upload their new license annually after completed training. The Volunteer Lawyer can log into their account and view current matches, pending matches, and previous matches. They can set the date/time/location to meet any veterans that are assigned to them. They can access a veteran's application and update/correct information with the application as needed.

### 4.2 ADMIN PROFILE:

The admin will have their own profile that will contain information about both Veteran and Volunteer Lawyer accounts. The admin will have the capability to enable/disable accounts as needed and view any created, completed, or pending documents within the system. The admin can rematch a lawyer with a veteran and pull reports and observe activity of the site and find ways for further optimization.

### 4.3 VETERAN/LAWYER MATCHING:

Once the Veteran successfully completes an application within their profile, the system will conduct a match to pair a lawyer who is closest in geographical location to the veteran. The Volunteer Lawyer will be notified through an email of the new match, and the Veteran will be notified through email of the match acceptance with a date/time/location invitation.

### 4.4 DATE/TIME/LOCATION PLANNING:

After a match has been made between a Veteran and a Volunteer Lawyer, the Volunteer Lawyer will be able to set a date/time/location for a meeting between the two parties. The location is selected in reference to the Veteran's home address and the closes public location (such as a library) with a time that works best with the Lawyer's schedule.

### 4.5 LEGAL DOCUMENT CREATION:

Upon completion of a meeting between the Veteran and the Volunteer Lawyer, a completed document will be generated, digitally signed, and ready for notarization for the veteran's official records. The document will be available within the system for 90 days within the veteran's profile in the even it needs to be accessed at a later date.

## PERSONAS

### JACK HARPMAN



Jack Harpman was a sergeant in the Vietnam War a part of the 9<sup>th</sup> infantry division. Jack was born in Raleigh, North Carolina in 1948, and enlisted into the army immediately following high school in 1966. After his basic training was completed, he was sent off to Vietnam in December of 1966.

During his time in Vietnam, Jack did exactly as he was told. He raided villages as instructed, and took what he wanted. He was taught to take no mercy on anyone and that everyone who is not American is the enemy. Jack didn't pay much attention to the news, or the protests that were against the war. As far as Jack was concerned, he was on the winning side, and that he was there to represent his country.

After being honorably discharged from the army in 1995, Jack went home to his family and started his life as a civilian. He moved into a role as a long-distance truck driver. He never really enjoyed people, and found the accompaniment of himself on the long drives kept him sane and calm. Throughout Jack's lifetime,

technology has evolved rapidly. He hasn't quite been able to keep up with it and it usually frustrates him that as soon as he gets the hang of one thing, something new is already out. He is not too savvy with the computer, and only knows the basics. He can check his email, pay some of his required bills through online websites, and play the occasional game of chess in an online environment.

Jack Harpman was widowed about 15 years ago and his two children are married off with children of their own. He lives by himself, retired at the age of 70, and receives his social security checks monthly. He doesn't have much money, but he owns his home, his car, and has a very small savings account that he is very proud of. He only sees his daughters and grandchildren twice a year, once on his birthday, in May, and the other on Christmas. He doesn't have a close relationship with his family, but still manages to sneak in a few phone calls in between visits to check in on the grandkids.

Jack only recently started to think about the future. His eldest daughter, Elise, has started to ask him questions about his health, if his will is up to date, and what they are supposed to do with his assets after he passes. Jack recently he has decided that maybe this is serious and something he should be taking his future and the future of his family into consideration. While he was in the army, they gave him a will, but he hasn't even touched it since he was in service.

Jack doesn't have much, but he wants to give what he has to his family. He wants to make sure they can keep the house, use his car, and take what little money he has to offer and use it towards the college tuition of his grandchildren. Jack has heard about the "Will Clinic" through the VA hospitals that he visits, and thinks that this may be the easiest route for him to come to this piece of mind without spending the money usually required to finalize these documents.

## 4.6 TIFFANY SCOTLANDS



From a young age, Tiffany Scotland has always wanted to be a lawyer. Maybe it was the crime television shows that sparked the interest, or it was the ability to help those who are unable to help themselves, she isn't really sure what started the urge. She didn't want to be a lawyer for the fame or the money, she wanted to be the one to be that change in the world that can potentially save someone's life and make a positive impact on their future. She worked hard through her undergraduate degree, at Seattle University and eventually was accepted into Seattle University's School of Law in 2008.

Tiffany graduated from Seattle University's School of Law in 2011. After graduation, she joined a local law firm specializing in Estate Planning and Trust Litigation. She spent the first few years just learning the ropes of the corporate world. She enjoyed helping others with their assets and giving those who she assisted a piece of mind that both their families and assets will be taken care of should anything happen to the client themselves.

Tiffany has always had a heart to help those who are unable to help themselves. She has always supported the military. Her grandfather was a WWII veteran and she would listen to the stories he would tell often when she was a child. She thought of her grandfather as a sort of strong and brave superhero, like Captain America. Unfortunately, her grandfather didn't have much money, and was usually struggling financially when it came to medical bills. She had assisted him already with making his living will and power of attorney, should his time come, but wished she could always do more.

Tiffany was a strong believer that those who go out and put their lives on the line deserve to be treated with respect and it is her responsibility to assist wherever she can. One of the ways that Tiffany has found out that she can give back to those who have served is to volunteer as a lawyer to assist veterans who are in financial need, like her grandfather, to assure their assets and wills are in order. Her firm only requires about 25 – 30 hours a week from her, so she has the ability to take the remaining hours available and use it towards the community. Although she wishes she could do more, she knows that what she can give is a huge assistance to those she is helping. Her favorite part about working with clients is listening to their stories, and getting to know them personally. Everyone has a different background, and learning about each and everyone she meets is, to her, a gift of a new perspective on the world.



## 4.7 ERIN JOHANNSON



Erin is an administrator for the Will Clinic. She is a lawyer herself and owns her own firm. She specializes in Family Practice and assistance with non profit organizations. She donates as much as time as can to help those in need, and offers her services both discounted and free wherever she can. She has strong ties to the Veteran community. Her father died in combat in the Gulf war in the early 90's and she wants to do everything she can to help those who have put their lives on the line for the country.

Her, and a few other friends who share the same beliefs as her, created the Will Clinic, to allow those who are in financial assistance to make sure they don't have to worry about assets, or living wills. She knows that this can be a burden on families, and the best way she knows how to give back to the veteran community is to give this to them for free.

The initial creation of the non-profit was a bit difficult to get started due to the amount of lawyers that she would require to volunteer their services. After reaching out to a few different contacts and firms, she was surprised the amount of lawyers that also shared her same beliefs and were eager to assist.

Erin's vision is to have enough volunteers to reach across the whole state of Washington. She doesn't want distance to be a deterrent for the Veterans to get what they need. She wants there to be enough time and resources that this runs smoothly and is easy for both parties involved.

Currently, Erin holds an annual meeting every year in October where all the volunteers signed up and any veterans that want to take advantage of the services meet. This usually is a long day and they can't always complete everything required. There is a need for a new site that streamlines this process a lot smoother and something that can make these matches and documentation creation happen more often than once a year. This is where the new Will Clinic comes into play. She hopes that this new site will help relieve stress and reach out to hundreds more veterans and volunteer lawyers.

## 5 USER SCENARIOS

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### 5.1 SCENARIO 1

#### 5.1.1 I lost my copy!

Jack recently met with Tiffany, and successfully completed his living will. He realized that he needs an additional copy of the will, and it has only been 45 days since his meeting with the lawyer. He logs into his account in the Will Clinic website. Accesses his profile, and sees that he has a saved document. He also sees that the document will only be available for 15 more days. He sees the digitally signed version of his living will, prints it off, and saves it on both his personal computer and in a personal safe place within his home. He wants the printed version to be notarized, like the original. He reaches out to the Tiffany through email messaging and requests that they get the document notarized again. A few days later, Tiffany responds back to Jack and agrees. They meet at the specified date and time and the document is notarized again for Jack's records.

#### Features

- Access digitally signed completed documents for up to 90 days after completion
- Email messaging system to the lawyer
- Log into personal profile
- View personal profile

### 5.2 SCENARIO 2

#### 5.2.1 Come back later...

Jack is in the middle of filling out his questionnaire within the Will Clinic site, but is unable to answer some of the questions right away. He selects the "Save and Continue Later" button located at the bottom of the page. He logs out of the Will Clinic site. A couple weeks later, Jack received the missing paperwork that he needed to finish the questionnaire. He logs back into the Will Clinic site, and picks up right where he left off. He can easily finish the questionnaire without starting over. Once he completes his questionnaire he submits application. About a week later, Jack receives a notification from Tiffany, the Volunteer Lawyer assigned to him, to meet at the public library on Nov 30<sup>th</sup> at 3:00 pm to finish the process. Jack found this process to be easy and not stressful at all. He is excited to meet with Tiffany to finalize his living will.

#### Features

- "Save and Continue" button on each page of questionnaire
- Log out and Log into personal profile on Will Clinic
- Email notification messaging through the site
- Date and Time set from Lawyer for meeting time.

### 5.3 SCENARIO 3

#### 5.3.1 Let's do a rematch...

Erin logs into her admin account. She wants to view the reports that have been generated from the past 60 days of the site. She pulls the time spent report and notices that most of the veterans filling out the questionnaire spend about 90 min on the 3<sup>rd</sup> page of the questionnaire. She reviews what the 3<sup>rd</sup> page consists of and sees that is the page where the Veteran puts in the exact assets they own and their net worth. She believes that this page can be streamlined and should only take a veteran 30 minutes at most to complete. She makes a note to work with her IT Team to find ways to

optimize this process. While logged in, Erin has received some reports of a Volunteer Lawyer's account who has not been responsive to her veterans. She views the lawyers profile, sees no activity on the account in over 4 months, and decides to disable the account. She matches the Veteran they are assigned to to a new lawyer who is geographically close to the veteran. She sends a notification directly to the new lawyer to inform them of the new match and to follow up with the Veteran as soon as possible. Erin is very glad that her reports were easily accessible and that she could easily take care of a potential issue.

### Features

- Pull reports
- View time spent on specific pages
- Search for specific Volunteer Lawyer
- Disable account
- Send message notification
- Rematch a veteran with new lawyer

### 5.3.2

#### SCENARIO 4

##### One meeting, and it's done

Tiffany has decided to sign up for the Will Clinic. She creates an account, fills out all the required information and finalizes her account. Tiffany sets her account to active to accept veteran matches. A few days later, Tiffany gets a notification that a new veteran match has been found for her. She logs into her account, sees that a veteran named Jack needs assistance. She selects Jack's application profile, it looks like something she can easily assist with. She accepts the match and sets a date and time for Next Friday at 2pm to meet with him and discuss his application. A few days later, she receives a notification that Jack has accepted the meeting. During the meeting between Jack and Tiffany, she can see that Jack had incorrectly filled out the assets portion of his application. She goes into his application and updates it to the most up-to-date correct information. She adds in her own personal notes into the application, about specific numbers and information that may be important later. They can finish the application after the 2-hour meeting. Tiffany finalizes the documents, send it off to the printer, and gets the Living Will notarized. Tiffany reminds Jack that a copy of the digitally signed application will be available within his account for 90 days. She thanks Jack for his service and lets him know to reach out to her should he have any further concerns about the documentation created that day.

### Features

- Volunteer Lawyer account creation
- Accept/Decline match with a veteran
- Set date/time of a meeting
- Email messaging communication
- Personal notes on a Veteran's application
- Update a Veteran's application with correct information

## 5.4 SCENARIO 5

### 5.4.1 Keeping it updated

Tiffany receives a notification that her Continuing Legal Education training is due within the next 60 days. She makes an appointment to renew this training and updates her account while in the Will Clinic site with her new expiration date of her training. While she is logged into her account, she views the veterans she is currently working with and wants to review what she has done the past couple months. She selects Jack's veteran's application and remembers that she needs to complete with the assistance of his living will. She reviews the notes and sees that during their last meeting, it

had to be cut short due to an emergency on Jack's side. She sees that she has an opening next week over her lunch hour to meet with Jack. She sets up a date and time within her profile under Jack's application and sends a request to meet him at the local library at 12:30pm next Tuesday. A couple days later, Tiffany sees that Jack has accepted this request and she keeps the date on her calendar. Next Tuesday comes and Tiffany meets Jack at the Library. They can easily pick up where they left off and complete the application process and finalize it with a digital certificate. Tiffany prints off the Living Will, gets it notarized, and give it to Jack. Jack is very happy with the completed process. Tiffany is satisfied she was able to assist Jack in the completion of his Will. Tiffany thanks Jack for his service, and lets him know to reach out to her if he has any more questions about the process.

**Features:**

- Notification of CLE Expiration
- Viewing personal notes from a veteran's application.
- Completion of an application with digital certificate.
- Set date and time of meeting through email messaging.

## 6 USER STORIES

Ranking	User Story	Acceptance Criteria
1	As a Veteran, I want to fill out an application to be matched with a Volunteer Lawyer	<ul style="list-style-type: none"> <li>• Veteran and Volunteer lawyer match successful</li> <li>• Application created with questionnaire to determine eligibility</li> <li>• Veteran profile is accessible on volunteer lawyers personal profile for notes and reference</li> </ul>
2	As an admin, I want the passwords saved to be hashed and salted	<ul style="list-style-type: none"> <li>• Passwords are not saved as plain text in database</li> <li>• Salts of passwords are each unique from each other</li> <li>• On password reset, the user must enter a new password</li> </ul>
3	As a Veteran, I want to view archived documents that have already been digitally signed by the Volunteer lawyer assigned to my application	<ul style="list-style-type: none"> <li>• Previously completed documents are accessible on the Veteran's personal profile</li> <li>• The Veteran can print out an archived document saved on their profile</li> </ul>
4	As an admin, I want to be able to disable a user's account	<ul style="list-style-type: none"> <li>• The account that has been disabled is not accessible by the user</li> <li>• The Admin will see a 'disable' indication next to any disabled user accounts</li> </ul>
5	As an admin, I want data retention within the site, and all completed documents older than 90 days should be purged from the database	<ul style="list-style-type: none"> <li>• No documents older than 90 days are saved in the database</li> <li>• A script is present that runs every evening to remove any documents older than the 90 days</li> </ul>
6	As a Volunteer Lawyer, I want to be able to determine when I am available to accept new matches from Veterans	<ul style="list-style-type: none"> <li>• Each Volunteer Lawyer profile will consist of an "Active status"</li> <li>• The Volunteer Lawyer will have the capability to toggle this</li> <li>• When Active, matches will be made</li> <li>• When inactive, they will not be included in any potential matches</li> </ul>
7	As an admin, I want to view archived applications that have been completed and digitally signed.	<ul style="list-style-type: none"> <li>• An admin will have a page on their account that will link to all completed and digitally signed documents.</li> <li>• Only the last 90 days of documents will be available</li> </ul>

8	As an admin, I want to be able to log and save the IP address that the visitor of the site is accessing from to confirm security within the account	<ul style="list-style-type: none"> <li>• The database will keep track of where and when each user logs in</li> <li>• There will be a check against this table upon every login to confirm the location and IP address distance “makes sense” to ensure security</li> </ul>
9	As a Volunteer Lawyer, I want to be able to be able to easily finalize an application and send it off to a printer to be notarized	<ul style="list-style-type: none"> <li>• Each Veteran Application, from the Volunteer Lawyer’s point of view, will have a “Finalize and Complete” button.</li> <li>• The Finished document will be in a printable format for easy notarization.</li> </ul>
10	As an admin, I want reports to know how long a user spends on each part of the site.	<ul style="list-style-type: none"> <li>• Database has a table to record how long a user spends on each section of the questionnaire and other potential challenging parts of the site</li> <li>• This data is generated into a report, upon request of admin, to show the time spent on each section to flag any problematic areas</li> </ul>
11	As a Volunteer Lawyer, I want to be able to accept the matches of Veterans that are closest to me geographically	<ul style="list-style-type: none"> <li>• A Volunteer Lawyer will receive a notification when a potential match has been made</li> <li>• The Volunteer Lawyer will be able to view the Veteran’s profile (not application) before accepting a match</li> <li>• The Volunteer Lawyer can select “Accept” or “Decline” when seeing a potential match with a Veteran.</li> </ul>
12	As a Volunteer Lawyer, I want to be able to add personal notes to a Veteran’s application	<ul style="list-style-type: none"> <li>• When logged in as a Volunteer Lawyer, I want to view the Veteran’s application with a special location to put in my own personal notes, as well as see any previous notes taken.</li> <li>• These notes will not be included in the finalized digitally signed document</li> </ul>
13	As an admin, I want to be able to search for users within the admin portion of the site	<ul style="list-style-type: none"> <li>• A search page is created that allows for input of First Name and/or Last Name</li> <li>• The Admin will have filter options to target the type of user if they desire</li> <li>• The search results will link to the user profile of the user indicated</li> </ul>
14	As a Volunteer Lawyer, I want two factor authentications when logging into my account	<ul style="list-style-type: none"> <li>• Once a Volunteer Lawyer logs in, they will have to also have to input</li> </ul>

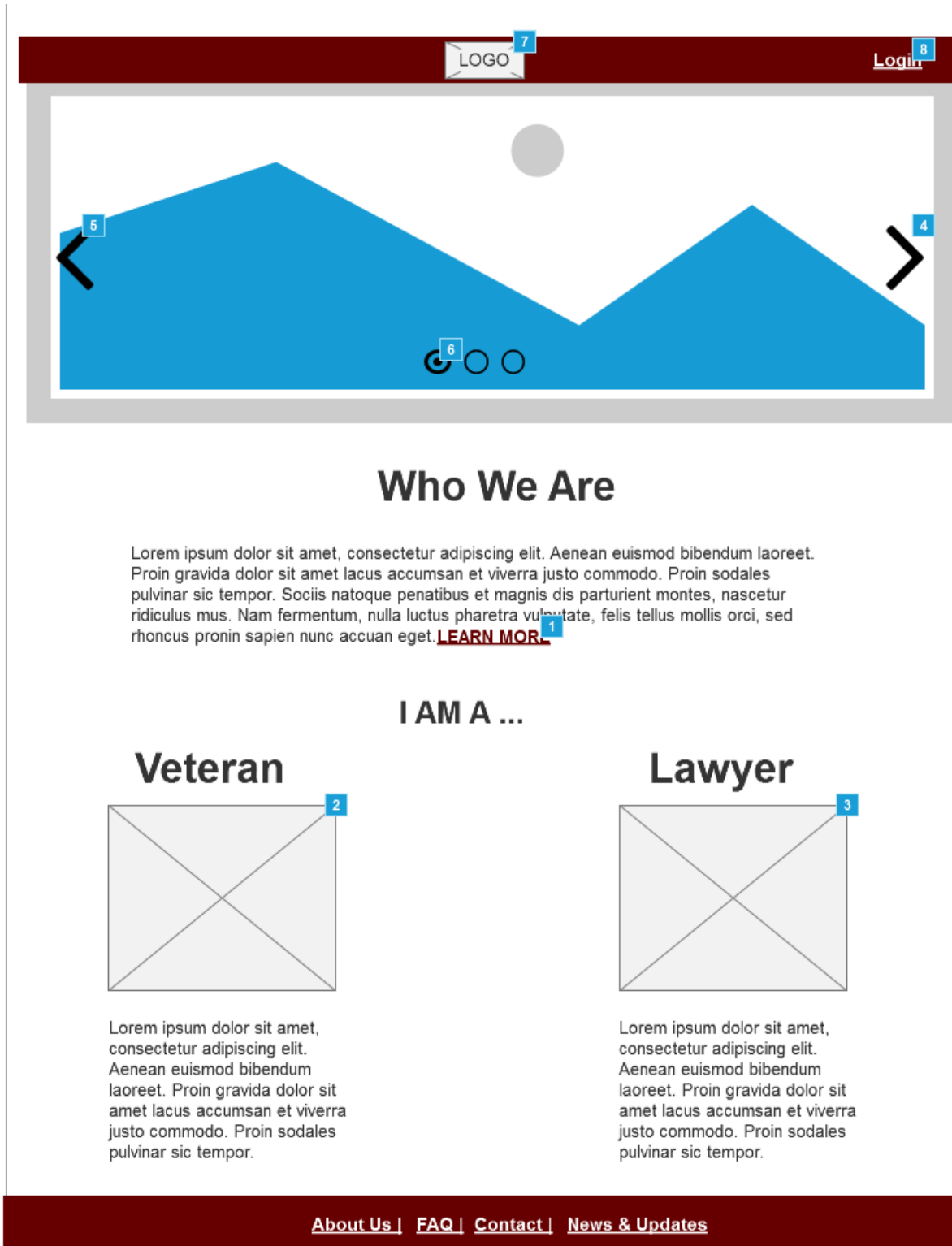
		<p>a 5-digit code that is sent to their cell phone to confirm their identity</p> <ul style="list-style-type: none"> <li>• The 5-digit code is validated, and access is granted after success</li> </ul>
15	As an admin, I want to view any pending applications from Veterans that are not yet finished.	<ul style="list-style-type: none"> <li>• An admin can view any Veteran profile and see any unfinished pending applications that are not yet completed.</li> <li>• The admin can see the information that has been filled out so far</li> </ul>
16	As a Veteran, I want to be notified when the Volunteer Lawyer has accepted my match and set a date and time to meet	<ul style="list-style-type: none"> <li>• A veteran will receive an email indicating the acceptance of a Volunteer Lawyer</li> <li>• The email will contain a date and time of their meeting location to review the application.</li> </ul>
17	As Veteran, I want to be able to save my application at any given time, and return later to finish.	<ul style="list-style-type: none"> <li>• At the bottom of each page of the application there will be a "Save and Continue Later" button.</li> <li>• The Veteran can log in and access the application at a later date and pick up where they left off.</li> <li>• Should the Veteran navigate away from the page without saving, a notification will ask them if they want to save.</li> </ul>
18	As an anonymous user, I want to be able to easily find the requirements of who can qualify for the Will Clinic services	<ul style="list-style-type: none"> <li>• The Website will include a list of FAQs that indicate who is and is not eligible for the Will Clinic services</li> </ul>
19	As a Volunteer Lawyer, I want to be reminded of when my Continuing Legal Education Training is about to expire	<ul style="list-style-type: none"> <li>• When it comes within 60 days of the CLE expiring, the Volunteer Lawyer will receive an email notification of the expiration</li> <li>• When it comes within 30 days of expiration, the Lawyer will receive a notification upon login of their account</li> <li>• When it comes within 10 days, the Lawyer will receive a "final notice" email indicating the expiration</li> </ul>
20	As a Volunteer Lawyer, I want to see all the Veterans that I have assisted with and the personal notes that I took during the meeting	<ul style="list-style-type: none"> <li>• The Volunteer Lawyer will have a section of their personal account that is dedicated just to the Veterans they are and have been assigned to</li> <li>• Upon selecting each of the veteran's profile accounts, the Lawyer can see all personal notes they have taken during the sessions.</li> </ul>





## 7 WIREFRAMES

### 7.1 HOME



### 1.1.1. Item Notes

Footnote	Name	Note
1	Who We Are Learn More Link Button	Redirect to a static page that tells the user more about the Will Clinic and what they do.
2	Veteran Image	Picture of Veteran. Redirect to Veteran Page
3	Lawyer Image	Picture of Lawyer. Redirect to Lawyer Page
4	Right Carousel Arrow	Carousel right to next image
5	Left Carousel Arrow	Carousel left to previous image
6	Active Image Indicator	Indicates what image is being displayed in the lineup
7	Logo Image	Custom Logo
8	Login Button	Redirect to login page

7.2 VETERAN PAGE

LOGO

Login

# Thank You for Your Service

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Proin gravida dolor sit amet lacus accumsan et viverra justo commodo. Proin sodales pulvinar sic tempor. Sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nam fermentum, nulla luctus pharetra vulputate, felis tellus mollis orci, sed rhoncus pronin sapien nunc accuan eget.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Proin gravida dolor sit amet lacus accumsan et viverra justo commodo. Proin sodales pulvinar sic tempor. Sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nam fermentum, nulla luctus pharetra vulputate, felis tellus mollis orci, sed rhoncus pronin sapien nunc accuan eget.

## Create Your Account...

Email:

First Name:

Password:

Last Name:

Confirm Password:

Branch of Military:

US Army

REGISTER

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Footnote	Name	Note
1	Military Branch Dropdown Menu	Displays all branches of the military. The user will select which branch they served.

Footnote	Name	Note
2	Veteran Registration	Register as a Veteran. An account will be created. The user will then be redirected to their Veteran Profile.

7.3 VETERAN PROFILE

Hello, Jack.

LOGO

Logout

Jack Harpman

First Name: Jack

Physical Address:

Last Name: Harpman

Phone Number:

City: State:

Branch of Military: US Army

Zip Code:

START NEW APPLICATION

UPDATE

Open Applications

Date Started

Last Opened

Percent Completed

11/28/2017

11/29/2017

67%

Completed Applications

Date Completed

Assigned Lawyer

Days Available

11/15/2017

Tiffany Scotlands

79 days

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Footnote	Name	Note
1	Update Profile Button	Saves the updated information into the database.
2	Percent Completed Link Button	Percentage of the application to completion. Links to the application.
3	Last Opened Link Button	Indicates the date that the application was last opened.

Footnote	Name	Note
4	Date Started Link Button	Indicates the date the application was started
5	Days Available Link Button	Indicates the number of days left until the application will be removed from the system.
6	Assigned Lawyer Link Button	Indicates the assigned lawyer to the case. This links to the Lawyers public profile.
7	Date Completed Link Button	Indicates the date the application was completed. Links to the document completed.
8	New Application Button	Redirect to application.
9	Login Greeting	Login Greeting
10	Logout Link Button	Logout Link button. Redirect to Home Page

## 7.4 LAWYER PAGE

LOGO

Login<sup>2</sup>

### You're Making a Difference...

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Proin gravida dolor sit amet lacus accumsan et viverra justo commodo. Proin sodales pulvinar sic tempor. Sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nam fermentum, nulla luctus pharetra vulputate, felis tellus mollis orci, sed rhoncus pronin sapien nunc accuan eget.

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### Create Your Account...

Email:

First Name:

Password:

Last Name:

Confirm Password:

Company Name:

REGISTER<sup>1</sup>

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Footnote	Name	Note
1	Lawyer Registration Button	Register the user and create the account.
2		Redirect to Login page

## 7.5 LAWYER PROFILE

Hello, Tiffany!

LOGO

Logout

## Tiffany Scotlands

First Name: Tiffany

Office Address:

Last Name: Scotlands

Phone Number:

City:  State:

CLE Expiration: 6/26/2018 [UPDATE](#)

Zip Code:

UPDATE

### Veterans Assigned

Name	Date Assigned	
<a href="#">Jack Harpman</a>	<a href="#">11/29/2017</a>	<a href="#">VIEW</a>

### Completed Applications

Date Completed	Veteran Name	Days Available	
<a href="#">11/15/2017</a>	<a href="#">Jack Harpman</a>	<a href="#">79 days</a>	<a href="#">VIEW</a>

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Footnote	Name	Note
1	Veteran Name Link Button	Clickable link. This will redirect the Lawyer to the Veteran's application.
2	Date Assigned Link Button	Links to the application, just like the name. This is the date that the Lawyer received this application assigned to them.



Footnote	Name	Note
3	View Application Button	Although the name/date are links, an actual button is present to view the application.
4	View Completed Application Button	This is a view of the finished document.
5	Days Available Link Button	Document is only available for 90 days. this is the remaining days left.
6	Lawyer Profile Update Button	Update the information of the user's profile and save it to the database.
7	CLE Update Link Button	Send updated credentials. As days get closer, this will change color to red to indicate priority.

7.6 Lawyer Match Page

1

2

LOGO

Hello, Tiffany.

Logout

Matches

4

Match 1 of 1

3

Name:

Jack Harpman

Meeting Date:

5

Meeting Location:

6

Decision:

Accept

7

8

SAVE

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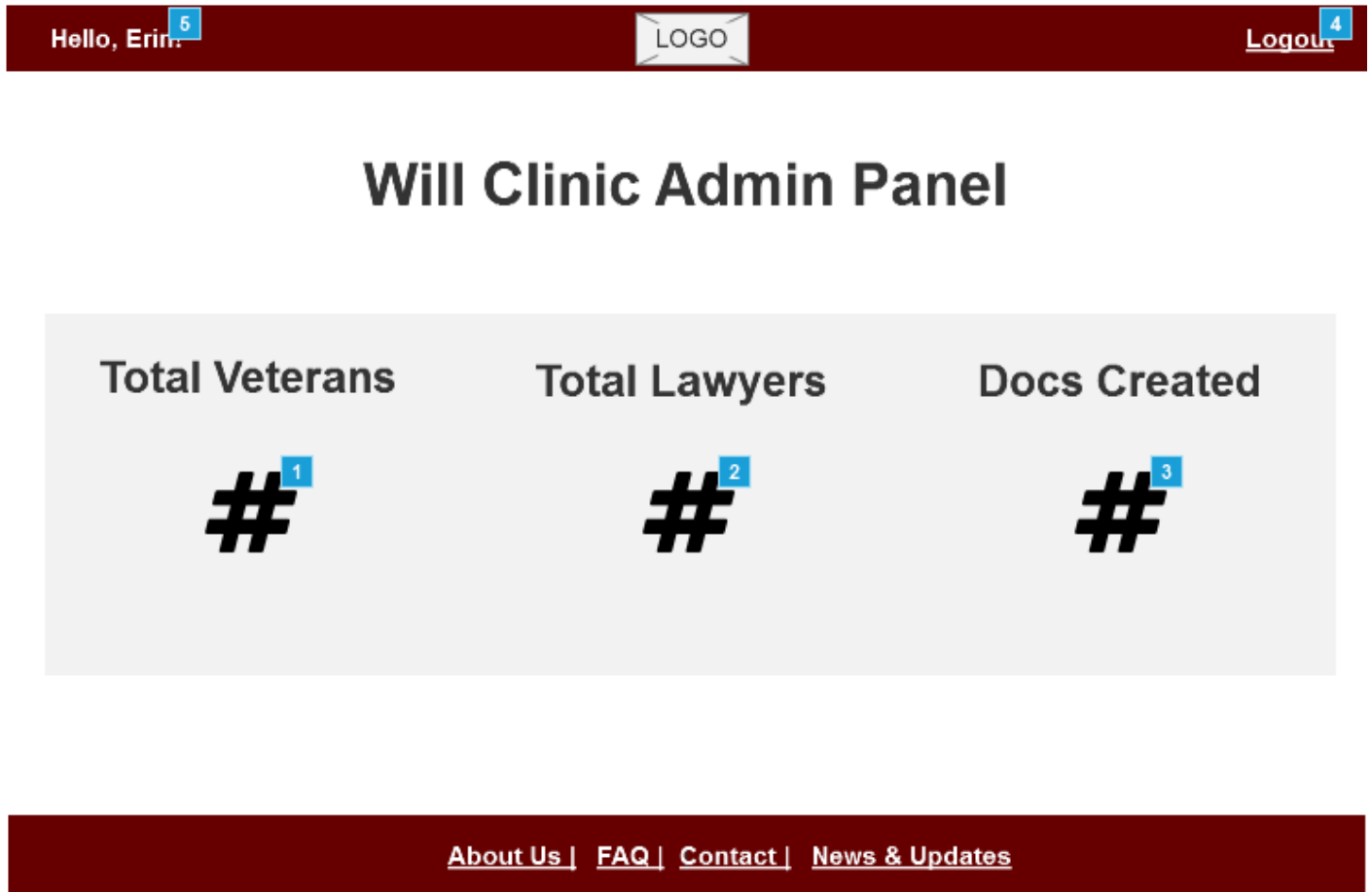
Contact

News & Updates

Footnote	Name	Note
1	Logout Link Button	Logout button. Redirect to home page.
2	Login Greeting	Custom greeting to the lawyer.

Footnote	Name	Note
3	Next Match Image Button	Iterate through the total number of matches that you have. In this case, we only have one.
4	Previous Match Image Button	Iterate to previous matches that are pending.
5	Meeting Date Calender Icon	Calendar popup to pick a date on the calendar on what day to meet
6	Meeting Location GPS Location Icon	This will redirect to a list of locations. The address from the Veteran's profile will be sent to Google Maps, and a public location, preference to public libraries, will be listed for the Lawyer to pick. The lawyer will not know the Veteran's address during this phase.
7	Decision Dropdown	The Lawyer will have two options with this dropdown. Accept/Deny. if Deny is chosen, the meeting date and location gray out.
8	Save Match Button	Save the information inputted. A notification will then be sent off to the veteran to confirm the meeting date/time

## 7.7 Admin Page



### 1.1.2. Item Notes

Footnote	Name	Note
1	Number of Veterans	This will indicate the total number of Veterans that have signed up in the site.  This number will link to a list of all the Veteran users. Each of those Veteran user pages will link to the associated profile.
2	Number of Lawyers	This will indicate the total number of Volunteer Lawyers that have signed up in the site.  This number will link to a list of all the Lawyer users. Each of those Lawyer user pages will link to the associated profile.
3	Number of Documents	This number indicates the total number of docs created. When selecting the number, the admin will be redirected to page with a link to all documents that have not been purged from the system, in addition to the number of days left before they are removed.
4	Logout Button	Logout button to redirect to homepage
5	Login Greeting	Greeting of the user who is logged in.

## 8 FUNCTIONAL REQUIREMENTS (FR)

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### USER TYPE 1: ADMIN

An Admin is a user type that can interact with the Will Clinic web application. The admin has the highest elevated privilege amongst all 3 user types.

#### FR 1.0 Enable & Disable User Accounts

The admin will have the capability to enable and disable user accounts of type Volunteer Lawyer or Veteran if needed.

#### FR 1.1 View User Accounts

An admin can view the user profiles of both account types of both Volunteer Lawyer and Veteran.

#### FR 1.2 Update User Accounts

An admin will have the capability to update and edit user account information for both Veteran and Volunteer Lawyers. The Admin will be able to override any information within the profiles.

#### FR 1.3 VIEW ARCHIVED DOCUMENTS

The Admin will have the capability to view all documents that have been created and saved. The documentation available for viewing will only be the documents that have not yet been purged from the system. The types of documents that have can be archived is:

- Living Will
- Power of Attorney
- Health Care Directive

#### FR 1.4 View Matches

The admin will have the capabilities to view the matches that have been made between Volunteer Lawyers and Veterans. The admin will be able to override a match or force a match between the two user types.

#### FR 1.5 Search Users

An admin will have the ability to search for users through the following criteria:

- First Name
- Last Name
- User Type

After search completion, the admin will have the ability to view the filtered results and select the user profile of the desired user.

#### FR 1.6 View Unfinished Applications

The Admin will have the capability to see applications from the user type Veterans that are currently in progress and not yet submitted for matching.

#### FR 1.7 View Metrics of Site

The admin should be able to see the total number of matches made, as well as the total number of

documents created.

## **USER TYPE 2: VOLUNTEER LAWYER**

A Volunteer Lawyer is a type of user account that will interact with the Will Clinic web application. They are a special type of user with special privileges through the site.

### **FR 2.0 Create Personal Profile**

The Volunteer Lawyer will sign up through the Will Clinic site through the registration process.

The required information for a Volunteer Lawyer to sign up is:

- First Name
- Last Name
- Physical Office Address
- Mailing Address
- City
- State
- Phone Number
- Available for Veteran Matches (Y/N)

#### **8.1.1 FR 2.1 View Personal Profile**

A Volunteer Lawyer will be able to view their own personal profile. The viewable information will be everything listed in FR 2.0.

#### **8.1.2 FR 2.2 Update Personal Profile**

A Volunteer Lawyer will have the ability to update their personal information on their profile. The information that can be updated is everything listed in FR 2.0

### **FR 2.3 Annual Check of CLE**

Annual training of Continuing Legal Education is required for each Volunteer Lawyer. This must be confirmed annually upon anniversary of the Volunteer Lawyer's registration. The Volunteer Lawyer's account can only be active if they have completed this training.

### **FR 2.4 Accept Veteran Matches**

A Volunteer Lawyer must accept a match made between themselves and a potential Veteran. The options a Volunteer Lawyer should have after accepting a match is

- Date from a calendar on when to meet
- Set time (military time) to meet
- Public location to meet
- Message to send to Veteran

The match from the Veteran and the Volunteer Lawyer is based off of the geographic location of the Volunteer Lawyer's office in comparison to the Veteran's home address.

If the Volunteer Lawyer declines the match between themselves and the Veteran, a message is sent to the veteran directly informing them of the decline, and a new match will be made to the next closest Volunteer Lawyer available.

### FR 2.5 View All Veteran Matches

It is possible for a Volunteer Lawyer to be matched with more than one Veteran. A Volunteer Lawyer should have the capability to view all the Veterans profiles that they have been matched too in addition to any personal notes taken during any conversations or meetings that have taken place. These notes should be located and indicated in the Veteran's profile.

#### 8.1.3 FR 2.6 Update Veteran application

A Volunteer Lawyer will have the capability to update and change the application that the Veteran had filled out. The Volunteer Lawyer can correct and change information that may be proven to be incorrect after talking through the application with the Veteran. The Volunteer will update the application typically during the in-person meeting between the Volunteer Lawyer and the Veteran in the public location. The Volunteer Lawyer will have a dedicated place within the Veteran's profile, that only the Volunteer Lawyer can see, that will contain the notes they have taken during the meetings and conversations.

#### 8.1.4 FR 2.7 Export Application

Once the Volunteer Lawyer has had the ability to update the Veteran's profile to the most accurate information, the Volunteer lawyer will be able to save the final version of the application and have it ready to be printed and notarized for the Veteran to keep a physical copy. The saved version of the application will only be available for 90 days from completion. After the 90-day mark, it will be purged from the database for data retention security.

## USER TYPE 3: VETERAN

The Veteran is a user type that will interact with the Will Clinic web application.

#### 8.1.5 FR 3.0 Create Veteran Profile

A Veteran will visit the site and register by creating an initial account. The following information will be required upon account registration:

- First Name
- Last Name
- Physical Address
- City
- State
- Zip Code
- Mailing Address
- Phone number
- Military Branch
- Years Served
- Other information TBD...

#### 8.1.6 FR 3.1 Update Veteran Profile

The Veteran will be able to view their personal profile, as well as update it in the event the information needs to be changed

#### 8.1.7 FR 3.2 Create Application

The Veteran will create an application, which will be separate from the initial account registration process. The application process consists of a preset questionnaire that is required to be filled out by the veteran to get a better idea of where they sit financially and if they qualify for the Will Clinic Service.

- The questionnaire questions are still being created. Update upon completion.

#### 8.1.8 FR 3.3 View Volunteer Lawyer Profile

After completion of the application, the Veteran will be matched with a Volunteer Lawyer who is geographically closest to the Veteran's location. The Veteran will see the Lawyer whom they are being matched with. The match between the Volunteer Lawyer and the Veteran will be in a 'pending' state until the Volunteer Lawyer is able to successfully accept the match and set a meeting date and time. The Veteran will not see the matched lawyer until after the match is successfully accepted.

#### 8.1.9 FR 3.4 View Saved Unfinished Applications

The Veteran will be able to save their progress at any given point in the application and return later. The application will be accessible after they exit the application and the Veteran can pick up where they left off upon their return. There is no time limit on how long a Veteran has to fill out the application to be matched with a Volunteer Lawyer.

#### 8.1.10 FR 3.5 View Archived Completed Documents

After the Veteran and the Volunteer Lawyer have met and finalized all the documents. The Veteran will have access to the archived document for 90 days following the final digital signature. After 90 days, the archived documents will be purged, and the veteran must resubmit a new application to get another copy of their document.



## 9 NON-FUNCTIONAL REQUIREMENTS (NFR)

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### 9.1 NFR 1 AVAILABILITY

The percentage of time that the system is up and running correctly. The Will Clinic application will be hosted on Azure Web Services. The availability of the system will abide by the Azure Web services SLA. The availability of the system will be at 99%. The system will not exceed the downtime of 3.65 days/year.

### 9.2 NFR 2 INTEROPERABILITY

The Will Clinic application will allow for interaction with third party components. The system will send and receive requests from both DocuSign and Google Maps.

1. DocuSign
  - The system will work with the DocuSign system to export and import documents from the system to obtain digital certificates.
2. Google Maps
  - The system will work with Google Maps by sending the address of the Veteran user and pinpoint the closes public library to determine a meeting place with the lawyer.

### 9.3 NFR 3 MODIFIABILITY

The Will Clinic application will allow for modifications within the system. The code base of the system will stay loosely coupled, allowing for extension and minimal dependencies.

### 9.4 NFR 4 PERFORMANCE

The Will Clinic application will perform under normal working conditions. There are no expected high peak or stress periods for the system. The performance of the system should function as expected at any given time. The system is expected to have a latency not to exceed 2.0 second.

### 9.5 NFR 5 SECURITY

The security of the Will Clinic web application will refer to the safety of the application and prevention of unauthorized users and attacks.

- The Will Clinic application will capture the IP Address of all users upon login.
- Upon login, the users captured IP address will be compared against the database of previous logins with the same IP. This is to prevent unidentified users gaining unauthorized access to other user's accounts.
- Two factor authentication will be enforced upon login for all user types
- Password requirements will be enforced with minimum length, special characters and expiry.
- All passwords will be hashed and salted. No two salts will be the same, and salts will not be reused.
- At least 99% of intrusions shall be detected within 10 seconds.

- The site will enforce security standards of HTTPS and TLS 1.2. The site will obtain a digital certificate authorized by a validated Certificate Authority.
- The archived documents in the database will not exceed 90 days. After 90 days, the archived data will be purged from the system in its entirety.

## 9.6 NFR 6 TESTABILITY

The Will Clinic application shall include unit tests with a total code coverage of no less than 95%.

## 9.7 NFR 7 USABILITY

The Usability of the site will refer to the use and interaction with the user within the application

- Four out of five Veterans shall be able to successfully complete a questionnaire within 30 minutes of using the system after a 10 minute introduction to the system.
- Four out of five Volunteer Lawyers shall be able to successfully accept and schedule a meeting with a Veteran within 5 minutes of using the system after a 10 minute introduction to the system.
- The response time of the Will Clinic web application will not exceed 1.0 second.
- At least 80% of users polled after a 3 month usage period shall rate their satisfaction with the system at 7 and more on a scale of 1 to 10.

## 10 PROJECT RISKS

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Risk	Probability	Impact	Approach	Mitigation
<b>Non-Veterans can register within the site</b>	High. The application will be advertised towards veterans, but it is likely non-veterans will receive the marketing campaigns as well	Unqualified users will be in the system	Acceptance	Require the user to select which branch of the military were in service with upon registration. We are not able to verify, upon registration if a Veteran is truly a Veteran. We are also unable to tell if the veteran was honorably discharged on their last enlistment.
<b>Two Factor Authentication on login may prevent users from accessing their accounts</b>	Medium	Increase in support, or assistance with gaining access to accounts when they are unable to confirm their identity twice	Acceptance	Require the users to confirm their two factor when they set it up. Annotate within the registration process and have the users agree to the TFA process.
<b>Documents not available after 90 days</b>	Low	Users will not be able to retrieve documents older than 90 days, requiring users to start over in the event they need to get a new copy	Acceptance	As a security policy, this is a risk we are going to accept to prevent all data being compromised. The number of days the document will be available will be displayed next to each completed document.