Final Project Biography
Petition for Removal of a Guardian of a Minor
Kaitlin Coyne - Coding the Law Fall 2023

Link to Automated Interview Prototype:

https://apps-dev.suffolklitlab.org/interview?i=docassemble.playground402:Final_Project.yml#page1

Link to General GitHub Profile:

https://github.com/KateCoyne/ctl

Link to Final Project .yml file on GitHub:

https://github.com/KateCoyne/ctl/blob/main/Final_Project.yml

Framing

  The purpose of this project is to aid the Document Assembly Line Project in their effort to improve accessibility to court forms by making the process of filling them out simpler and clearer. Specifically, by automating the Petition for Removal of a Guardian of a Minor form currently available only online as a PDF. This format is difficult for those that struggle with technology and those that do not have access to an attorney that can explain the form and its contents. Having a guided interview makes the form and process more approachable to this demographic.

Research

  Currently, this form is available on the Mass.gov website as a PDF: Petition for Removal of a Guardian of a Minor. Individuals that need to use the form can electronically fill the fields of the PDF by typing into them or printing and filling the fields by hand. Filling out PDFs can be frustrating especially when the task is for such a serious and/or confusing process to begin with. The automated interview will enable users to focus on just answering the questions, with supplemental information explaining and/or simplifying what is being asked. The PDF is then filled out for them.

  Q&A mark up was a viable option to create a guided interview, but Docassemble was most appealing as it filled out the preexisting PDF at the end for the user to simply download and file.

Prototyping

Several forms were in consideration for this project, but after meeting with Professor Colarusso on November 6, 2023, we concluded that the Petition for Removal of a Guardian of a Minor form would be the most feasible.

To begin, I went through the PDF form and annotated what questions or confusions I thought an individual with very minimal pre-existing knowledge of the form would have to be sure I included explanations in the interview.

Next, I familiarized myself with snake_case and labeling on gavel. It took trial and error to label as clearly as possible, especially because there were more potential names going on the form than just petitioner's and defendant's.

Then, I put the filled PDF through weaver. Once I was able to produce a YML file, I did most of my specific editing in the playground. At first, I was hesitant to make many changes in the playground because I didn't feel comfortable with the code. But, after much practice, I became much more familiar and made some significant changes that were imperative to making the user interface user friendly. At this point, I was prepared to transition to the user testing phase.

User Testing

First, I went through the interview myself many times. This alone helped me so much to see what I needed to adjust. Other than myself, I had 2 law school friends, my boyfriend, my 2 sisters, and both parents test out the interview. All of these people have varying levels of legal knowledge and familiarity with court forms and technology skills which I think was beneficial. This provided multiple perspectives on the ease of the interview.

Refinement

As a result of the user feedback, I decided I wanted to reorganize the order of the questions and add additional definitions. While reorganizing, I must have messed something up because my interview stopped working completely (I encountered an error). I met with Professor Colarusso again on December 5, 2023, and we discussed potential solutions. We couldn't totally conclude what the issue was, so ultimately I decided to start from scratch. It didn't take nearly as much time as my first time around because at this point I felt more comfortable with weaver.

Intro Pitch

A link to my final project pitch powerpoint: Final Project Pitch - Kaitlin Coyne.pptx

Complexity/Robustness

The entire scope of the project is not super complex, but this has given me the opportunity to go in more depth using document automation to produce an interview for one form rather than only scratching the surface on several forms.

Impact & Efficiencies

As briefly mentioned above, this automated interview saves time and increases the efficiency of users filing this petition. User interface is friendly to users with otherwise very minimal knowledge. It explains terms and informs users what exactly is being asked where the PDF version otherwise wouldn't.

One issue I am aware of is that certain fields are coming up as required when I would like them to be optional (asterisk v. no asterisk). I discussed this with Professor Colarusso in our December 6th meeting but I have been unable to figure out how to remove it. It's not necessary to the actual use of the interview but I think it would improve efficiency.

Fit/Completeness

The automated interview is workable and the user interface is approachable. Users can go through all the questions and reach a completed document at the end. With more work, the interview could become more complex and address more nuances in different petitioners' situations. Users are able to complete the form and understand what the legalese terms mean without consulting an attorney therefore saving costs but hopefully still able to submit a thoughtfully filled out form. Also, this significantly removes the time spent trying to figure out how to fill a PDF. In total, the amount of time expended by a user in completing this form has decreased by more than 10%.

I struggled to move things around in the playground without totally messing it up, so certain things are not where I would prefer them to occur in the interview. I decided to leave them as is for the sake of submitting a functioning interview. I think these will be relatively minor changes to make with the help of someone with more knowledge - definitely less than 2 days of work to launch.

<u>Documentation</u>

Throughout the process there are options for users to contact the LIT Lab when an error is encountered. This ensures that users can report difficulties/concerns when completing.

There are still many concerns to take into account for the future development of this automation. The form is still limited to English speaking users as well as those physically able to use technology. Additionally, this process assumes access to technology and the internet.

<u>Real World Viability/Sustainability</u>

At this stage, the interview will be ready for use with a little more enhancement of the questions and potentially additional research into the substantive legal ramifications of this petition. The coding aspect of the project is sufficient, but I think an additional, separate conversation would be required to discuss what advice can actually be given about what to put in the form (which I think will be an ongoing conversation even after the interview is launched).