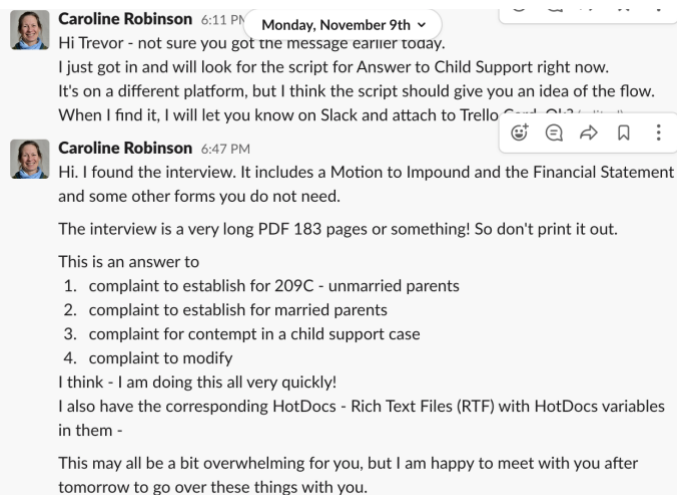


Trevor Mears
12/16/20

Coding the Law Biography (**All links are provided here and also under the README, so that they can be easily accessed.** <https://github.com/SuffolkLITLab/docassemble-PermissionToAccessDTAClientInformation/edit/main/README.md>)

I started this project attempting to do something with an answer for child support. I gave my quick presentation on what I was going to do regarding my child support answer. I explained that the problem for relevant users was that they would be served a complaint for child support or not paying enough and they might not know what the next steps would be. The options available at the time were very limited. Masslegalhelp.org was the one place that helped to show what a person can do. It was mostly suggestions about how to fill out the form. The users for this form would be the parents of the children that are being asked to pay the child support. The users are in a tough situation because obviously a lot of parent wants to help provide for the child in any way they can. The solution for the issue was to create a guided interview that would help the person fill out the form for court. The partner for the form was going to be the document assembly line project. It turned out that topic was going to be a very challenging one within the time limits that I had. I had discussions with Caroline Robinson about how to do the project. We spent a couple hours on zoom trying to figure out the coding aspect of this complicated issue. Here are some of the slack conversations we had about the project.



Caroline Robinson 6:11 PM Monday, November 9th

Hi Trevor - not sure you got the message earlier today.
I just got in and will look for the script for Answer to Child Support right now.
It's on a different platform, but I think the script should give you an idea of the flow.
When I find it, I will let you know on Slack and attach to Trello

Caroline Robinson 6:47 PM

Hi. I found the interview. It includes a Motion to Impound and the Financial Statement and some other forms you do not need.

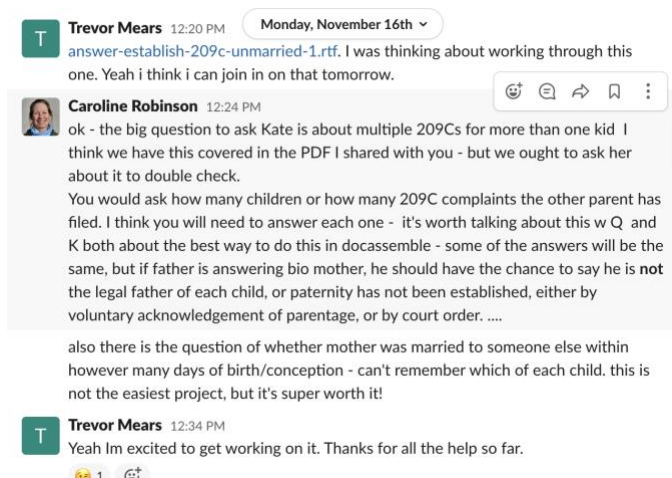
The interview is a very long PDF 183 pages or something! So don't print it out.

This is an answer to

1. complaint to establish for 209C - unmarried parents
2. complaint to establish for married parents
3. complaint for contempt in a child support case
4. complaint to modify

I think - I am doing this all very quickly!
I also have the corresponding HotDocs - Rich Text Files (RTF) with HotDocs variables in them -

This may all be a bit overwhelming for you, but I am happy to meet with you after tomorrow to go over these things with you.



This is a link to the google doc that we started trying to figure out the coding for the child support answer. At this point it is still in the early stages of development. But there is a little something to go off. The main issue was just there was some complicated coding that would have required a lot more time to do. The other issue is a struggled to find any sort of template to base this off. This was as far as the project got so there was no user testing or anything else. Hopefully someone in the future will be able to continue with this project when someone has more time to complete it.

https://docs.google.com/document/d/1CMqkDeuvgwoEvYmw6fa_6tIZREABxObvbsBS09olpQ/edit?usp=sharing

I soon moved to a new project which was the Access to DTA Client Case information. This was a much simpler coding project that I was able to complete a minimum viable product for. The users of this form are people that want to discuss their DTA information with helping organizations. The DTA is the department of Transitional Assistance that helps low income individuals meet their basic needs. I made sure to explain in the opening of the interview what the form does and what is needed to complete the interview. I explained that the person using the form will need to have their social security number or their Agency ID number in order to complete the form. Also that they need to know the name and location of the organization getting access to the information. I also explain what the DTA form does and why they would want to use it. Here is the link to the original form for a person to fill out. The interview I created makes it easier for a person to fill out the form because it does everything for them and takes it step by step. The finish product then explains exactly how the person can get the form to the DTA.

<https://www.masslegalservices.org/system/files/library/DTA%20Authorization-%20Consent%20form%20Jan%202016%20English.pdf>

Permission to access DTA client case information

This form grants organizations or other third parties permission to speak with DTA (Department of Transitional Assistance) and for DTA to share case records and information about the client. With authorization an organization can discuss your application or benefits with a DTA employee. The form is valid for 12 months unless stated otherwise. This form requires either the last 4 digits of your social security number or a DTA agency ID number. It also requires the name and location of the organization getting authorization.

< Undo

Next

The space for solution centered around my partner for the project which was the Document Assembly line project. This was the best way to set up my interview solution. The Document Assembly line project had the infrastructure and support that I required in order to set up the solution. Through user testing I was able to go through different design configurations. I first showed my fields template to Quinten Steenhuis who helped me make sure that the fields were named properly.

REQUEST FOR ACCESS TO CLIENT RECORD

Thursday, November 17, 2016

(Print Client's Full Name)

1. Client Information:

Date of Birth: Address:

Last 4 digits of SSN: or DTA "Agency ID" number:

2. I hereby authorize (organization's name and city/town) to have access to my DTA case record and case information, including any electronic records. I authorize this organization to discuss my application or benefits with a DTA case manager, supervisor, director or other DTA employee. This form is valid for 12 months unless I have stated otherwise on this form or in other communication.

3. I hereby certify that I am the client named above.

Client Signature Date

hey quinten does this look okay for the fields?

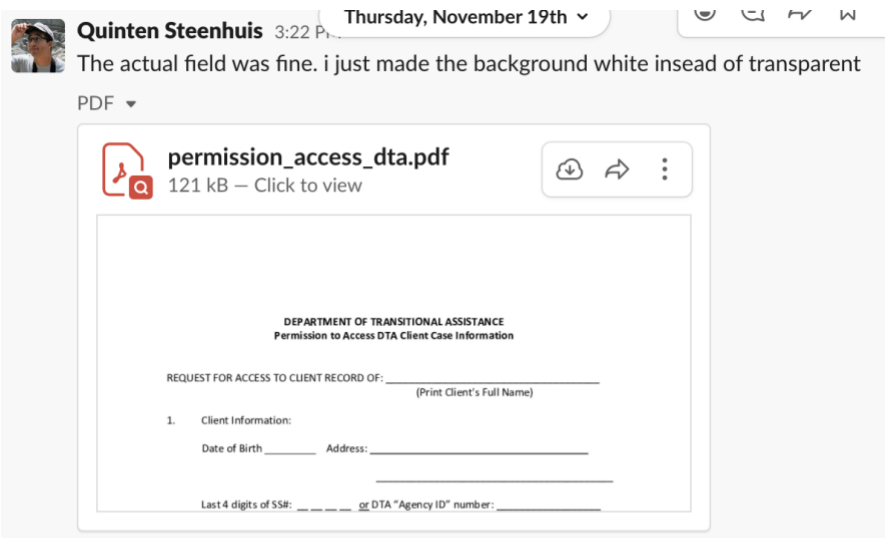


Quinten Steenhuis 2:29 PM

just check spelling - -signature_date



He then helped me get rid of the slashes behind the date of birth answer because it was going to interfere with the final product form.



Trevor Mears 3:23 PM
oh i see thank you

Since I was a little behind with the project I missed the steps when everyone was peer reviewing the work. So while I did ask for a peer review understandably everyone was quite busy with the holidays and their own project. So I moved on to getting some veteran reviews.

Trevor Mears Nov 19th at 3:23 PM
Hey guys, is anyone available for a peer review of my permission to access DTA client case form? (edited)

3 replies

Michelle (she/her) 26 days ago
Peer review or veteran review?

Trevor Mears 26 days ago
oh sorry, peer review

Michelle (she/her) 26 days ago
Got it. Maybe edit the post to reflect that so other people will spot right off whether it's related to them or not.



I had a demo presentation with Professor Colarusso where he told me many things that could be changed about the design of the interview. The first thing that I changed was that I made it so you only need to fill out your social security number or the agency ID. The form asks for either the last four digits of your social security number or the agency ID number. My first design had the person writing N/A for whatever they did not fill in. To make things easier I went into the code and made it so neither was required. This allows the user to continue the

interview after only filling in one of the questions. The next thing that I had to change was to make sure that a person could only put the last four digits of their SS# instead of allowing more than 4 digits. So I put the max length for that question to 4, so the person could not continue unless there were only 4 digits.

The DTA needs the last 4 digits of your Social Security Number or Agency ID Number in order to help identify your case.

fields:

- 'Last four digits of social security number': social_security_number
maxlength: 4
required: False
- 'DTA agency ID number': agency_number
maxlength: 17
required: False

The next user feedback was for getting rid of my question about the user address. At first, I had my own question for user address as well as the one that automatically comes in from the document assembly project. And when the form was showing the preview, only my user address question was filling in the form. So I got rid of my user address question and only have the “What is your address?” question fill in for the form.

The user feedback also suggested to clean up how the form looked with its finished product. The fields were not flush with line on the form, so the answers were kind of just floating in space. So I went back into adobe acrobat and made the fields size smaller so that the variables would sit on the lines. This was also an issue for the user address question because it was going on two lines and did not look good. So by making the field smaller the variable went on one line which made the final form look more professional. I also increased the length and maximum characters of the field to make sure that it all fit on one line.

User feedback from this demo also suggested to fix the date of birth line so that is was the traditional XX/XX/XXXX instead of writing out the month. Caroline was able to help me with the coding necessary to change the date of birth line.

Trevor Mears 1:15 PM Friday, December 4th

Hey Caroline i got a quick question for you. Is there a way to get the date of birth line to look like 4/12/1996 instead of April 12, 1996 as written?

Screen Shot 2020-12-04 at 12.31.23 PM.png

DEPARTMENT OF TRANSITIONAL ASSISTANCE
Permission to Access DTA Client Case Information

REQUEST FOR ACCESS TO CLIENT RECORD OF: Trevor Mears
(Print Client's Full Name)

1. Client Information:
Date of Birth: April 12, 1996 Address: 29 Homestead Park, Needham, MA 02464
Last 4 digits of SSN: 7774 or DTA "Agency ID" number: 7014

2. I hereby authorize [Organization Name Boston, MA]
(Impressor's name and city/state)
to have access to my DTA case record and case information, including any electronic records. I authorize this organization to discuss my application or benefits with a DTA case manager, supervisor, director or other DTA employee. This form is valid for 12 months unless I have stated otherwise on this form or in other communication.

3. I hereby certify that I am the client named above.
[Signature] December 4, 2020
Client Signature Date

→ Send through DTA Connect (DTA's mobile app).
Fax to (617) 887-8765.
Mail to DTA Document Processing Center, P.O. Box 4406, Taunton, MA 02780-0406

Caroline Robinson 1:17 PM



Caroline Robinson 2:14 PM

Ok I will try and pull your interview from github. just a sec.



2:18 oh duh. the variable is users[0].birthdate - sorry I was focussing more on the method/function than the variable name

So if you were going to go for the first one it should be:

```
- "user_birthdate": ${ format_date(users[0].birthdate, format='M/d/yyyy' ) }
```

I just tried it in your interview on my playground and it works. (edited)



Trevor Mears 2:31 PM

oh okay i was putting the user[0].birthdate in the wrong spot.

thank you so much



I then had Caroline do a plain language and legal accuracy review for me as well as another other suggestions that she had. I closed out all the issues what she gave me on my GitHub page.



Trevor Mears Dec 7th at 12:19 PM

Hey Caroline hope your Monday is going well. When you get a chance do you think you could review my interview for plain language and legal accuracy? Any other suggestions about how to improve the interview would also be greatly appreciated.

6 replies



Caroline Robinson 8 days ago

Yep - when do you need it?



Trevor Mears 8 days ago

no real rush needed. Interview isnt due till Dec. 17.



Caroline Robinson 8 days ago

Ok terrific - this will be a project I can do Wed or Thurs. Is your github up to date now? (edited)



In the code she suggested that I get rid of the address code that I had included in my original code. That was an easy fix to get rid of. I also fixed some of the grammar in the interview to make it easier to understand and took out words like “please”. Other feedback suggested to better fit the purpose and method was to explain the various ways to get the form to the DTA. So I added in a little paragraph about how to get the form to the DTA.

Below is a preview of your form. The form can be sent to the DTA in a few different ways. First, you can send it through the DTA Connect mobile app. Second, you can fax the form to (617)-887-8765. Third, you can mail it to the DTA document processing center, P.O. box 4406, Taunton, MA 02780. Lastly, you can bring it in person to the local DTA office. All the options are given at the bottom of your form.

The last thing that I changed from the user feedback was make the question about the organization and the location of the organization separate. At first I had the two questions combined into one. But separating them out makes it easier for the person to follow the interview correctly. The first step for this was to go back into my adobe acrobat account and turn and create a new text field. So the line for I hereby authorize now has organization_name and the new field city_town. Below is the final product of what my fields looked like.

REQUEST FOR ACCESS TO CLIENT RECORD OF:
(Print Client's Full Name)

1. Client Information:

Date of Birth Address:

Last 4 digits of SS#: or DTA "Agency ID" number:

2. I hereby authorize
(organization's name and city/town)
to have access to my DTA case record and case information, including any electronic records. I authorize this organization to discuss my application or benefits with a DTA case manager, supervisor, director or other DTA employee. This form is valid for 12 months unless I have stated otherwise on this form or in other communication.

3. I hereby certify that I am the client named above.

The DTA case information interview is a little unique for the fact that this is not something that is sent to the courts. The person can just fill out the form themselves and send it off to the DTA. The interview that I created certainly makes this a more efficient and understandable venture. It is not really about expanding the reach of an existing project and is more about getting the form out to any low income individuals part of the DTA. A person that is completing the form will certainly have an easier time doing so with this interview, and will also be able to understand exactly what the form does.

The interview at this time produces a viable product. It explains to the user exactly what they need in order to fill out the form before they start. Since it is a rather simply form, the only

thing the person need to know is their SS# or agency ID number, as well as the organization that is getting access to the DTA information. It is designed to take all the information from the interview and put it on the form in the correct spot. Here is an example of what the final product looks like.

DEPARTMENT OF TRANSITIONAL ASSISTANCE
Permission to Access DTA Client Case Information

REQUEST FOR ACCESS TO CLIENT RECORD OF: Trevor Mears
(Print Client's Full Name)

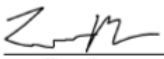
1. Client Information:

Date of Birth 11/13/1996 Address: 120 Tremont Street Boston, MA 02108

Last 4 digits of SS#: XXXX or DTA "Agency ID" number: _____

2. I hereby authorize Organization Name Boston, MA
(organization's name and city/town)
to have access to my DTA case record and case information, including any electronic records. I authorize this organization to discuss my application or benefits with a DTA case manager, supervisor, director or other DTA employee. This form is valid for 12 months unless I have stated otherwise on this form or in other communication.

3. I hereby certify that I am the client named above.

 _____ December 16, 2020
Client Signature Date

→ Send through **DTA Connect** (DTA's mobile app),
Fax to (617) 887-8765,
Mail to DTA Document Processing Center, P.O. Box 4406, Taunton, MA 02780 OR
Bring in person to a local DTA office

227

The beginning of the interview tells the user exactly what they need to fill out the form. Most of the things that are needed for this form are self-explanatory. The only thing that the person may not know is there Agency ID number or Social security number, and the organization location. I explain in the interview that the DTA needs to SS# or Agency ID number in order to help find the case information on the person seeking to give authorization to a third party. I went through a couple different iterations of how to ask the questions. The user feedback helped me to make the questions as clear as possible for the reader.

As the above example indicates the project is ready for real world use at this time. With just a few minor changes to the backend of the code needed to finish the project. Under the issues page on GitHub the only feedback left is about changing the code so that it fits more accurately for my project. Since my form is not sent to the court, the doc assembly line questions that are automatically filled in don't make sense in my context. That is pretty much the only thing that needs to be changed for this interview to be finished. My partner in this project is going to right a letter describing the work that needs to be finished for this project to be complete. Hopefully someone will take on the rest of the interview so that it can be finished in the near future.

Here is the link to the final source code:

https://github.com/SuffolkLITLab/docassemble-PermissionToAccessDTAClientInformation/blob/main/docassemble/PermissionToAccessDTAClientInformation/data/permission_to_access_dta_client_information.yml

Final template:

https://github.com/SuffolkLITLab/docassemble-PermissionToAccessDTAClientInformation/blob/main/docassemble/PermissionToAccessDTAClientInformation/data/permission_access_dta_info.pdf