

# Rogers Review Assistant & Rogers Review Reminder System

---

*Mallory Ursul*

This project biography documents the development and creation of the [Rogers Review Assistant](#) ("RRA") and [Rogers Review Reminder System](#) ("RRS").

---

## Process

### Framing

An adult guardian is someone who has decisional authority over some or all aspects of the respondent's life. Guardianship conflicts with the respondent's right to autonomy and therefore requires court authorization. Additionally, guardians are required to submit an annual Guardian Care/Plan Report to the court.

Rogers authority is the power that some adult guardians have to consent to and administer antipsychotic medication to the respondent. Rogers authority requires additional court approval and a more stringent review process.

Guardians with Rogers authority are required to partake in annual Rogers Review hearings. The following documents must be submitted to the court prior to the hearing:

- Motion to Extend and/or Amend Treatment Plan
- Motion to Waive Appearance of Respondent
- Clinicians Affidavit
- Treatment Plan
- Report of Monitor
- Guardian's Care/Plan Report
- Representation of Respondent's counsel
- Review Order of Antipsychotic Medication

These documents require significant time to complete. Additionally, some documents must be completed by parties other than the guardian, such as the respondent's clinician and opposing counsel. Guardians may not be able to complete the forms or may forget about the Rogers Review hearing all together.

Rogers authority expires if the guardian fails to ensure that all documents are served to the required parties and submitted to the court prior to the hearing. Without Rogers authority, the guardian cannot consent to or administer antipsychotic medication to the respondent. In some situations, the respondent may end up going without medication and potentially end up in the hospital.

Suffolk University Law School's Health Law Clinic helps clients obtain guardianship and Rogers authority. One issue facing the Health Law Clinic is that clients will obtain Rogers authority, fail to follow the

Rogers Review process, and then come back to the Health Law Clinic to go through the process of obtaining Rogers authority all over again. This is an issue that effects Volunteer Lawyers Project (“VLP”) and other attorneys working with guardianship.

There are three key components to helping guardians with Rogers authority comply with the Rogers Review process: (1) court document assistance, (2) step-by-step guidance, and (3) reminders about upcoming Rogers Review hearings. A solution that incorporates all three components can save guardians with Rogers authority the time, expense, and frustration of reobtaining Rogers authority and free up the Health Law Clinic, VLP, and other attorneys to help more clients.

---

## Research

The issue of Rogers authority expiring due to lack of guardian compliance with the Rogers Review process was presented to me by Professor Sarah Boonin, director of Suffolk University Law Schools Clinical Programs and director of the Health Law Clinic. I also spoke with an alum of the Health Law Clinic about her experiences with Rogers Review. The alum expressed similar frustration with the Rogers Review process as Professor Boonin.

To understand the issue, I reviewed guardianship materials provided to student attorneys in the Health Law Clinic. Using the Massachusetts State website, I conducted additional research on [Rogers Guardians](#) and the [Rogers Review process](#).

I researched existing solutions, which provide minimal assistance to guardians. The Massachusetts State website provides a court document [bank](#) that allows users to fill in PDF documents either on their computers or print the documents and fill them out manually. Guardians may also be able to obtain assistance from VLP and other legal aid organizations and practitioners.

Currently, there is no reminder system that is specific to Rogers Review or guardianship. Guardians can set their own reminders on a paper calendar as well as email or phone calendars.

---

## Ideation & Prototyping

The initial sketch of the solution integrated autogenerating court documents, a “next steps” checklist, and a reminder system into one app. Throughout development and testing, the solution was refined and changed from an all-in-one solution to a partially integrated two-app solution. This process is detailed below.

### Rogers Review Assistant (“RRA”)

The RRA helps users fill out court documents and provides a customized “next steps” checklist. I considered three potential options for the RRA: docAssemble, community.lawyer, and QnA. I decided against QnA because the court documents are in PDF format and not Word, which leaves docAssemble and community.lawyer as viable options.

DocAssemble is an attractive option because of the potential to integrate the RRA and RRS into one app. Other benefits of DocAssemble are that it allows for greater developer flexibility and can exist on Suffolk’s own servers, provided Suffolk builds servers. A significant downside of docAssemble is that it is

not as intuitive as community.lawyer and requires a greater degree of coding knowledge and experience.

Currently, docAssemble is accessed through Greater Boston Legal Services (“GBLS”). Any information obtained through Suffolk’s app is stored on GBLS servers. Another concern is that access to docAssemble is through a demo account provided to by Quentin Steenhuis from GBLS, which will eventually expire.

Community.lawyer, on the other hand, is an easy to use, free app developing system. Community.lawyer has fewer development options than docAssemble and limits the level of app customization. Community.lawyer only allows one app per account to be owned by the app developer. All other apps are subject to being copied and reproduced by community.lawyer. Like docAssemble, the user’s answers to the app questions are stored on community.lawyer servers.

Ultimately, community.lawyer was selected as the platform for building the RRA because of its practicality. Anyone can create a community.lawyer account, which allows the future Health Law Clinic LIT Fellows to easily access and update the RRA. Additionally, the RRA on community.lawyer is easy to maintain and requires little coding knowledge or experience.

### Rogers Review Reminder System (“RRS”)

The RRS sends 60-day, 30-day, and 7-day text message and email reminders to users to alert them of their upcoming Rogers Review hearing. The Health Law Clinic wanted a reminder system to send multiple scheduled and customized messages by email and text. Based on this, three options for creating the RRS were considered: Calendly Free, docAssemble with Twilio, and Calendly Pro.

The first prototype was created and tested using Calendly Free and can be found [here](#). The benefits include that it is free, easy to use, and tested successfully. Calendly Free lacks key features such as message customization and scheduled email and text message alerts. Because Calendly Free did not have the capability to meet the specific solution requested by the Health Law Clinic, it was eliminated as an option.

A second prototype of the RRS was created using docAssemble with Twilio. The code for the prototype can be downloaded and viewed [here](#). Quentin Steenhuis allowed me to use GBLS’s Twilio account for proof of concept purposes. Quentin also assisted with the initial code and trouble shooting.

Upon testing the docAssemble with Twilio RRS prototype, Professor Boonin expressed concern for users’ ability to reschedule reminder messages if their Rogers Review hearing date changes. While users can cancel text messages from docAssemble by texting the Twilio number ‘Cancel’, docAssemble lacks a streamlined way to reschedule text reminders. Rescheduling docAssemble texts requires multiple steps on both the user’s cellphone and the RRS system. Because of the complexity of rescheduling text reminders, the RRS with docAssemble may do more harm to users than good.

An RRS prototype using Calendly Pro can be found [here](#). Like Calendly Free, Calendly Pro is easy to set up and maintain. Calendly Pro includes key features the Health Law Clinic wanted in the RRS. It sends customized text messages and emails and has an easy reschedule and cancel option. While the RRS using Calendly Pro cannot be fully integrated into the RRA, Calendly Pro can be embedded into an existing webpage.

The RRS using Calendly Pro costs the most of the three options at \$144 annually, which is \$12 per month. The Health Law Clinic may be able to find funding from within the clinic program or an external source of funding, such as VLP or the Massachusetts Court System.

The final version of the RRS uses Calendly Pro. For a full options comparison chart of the RRS using docAssemble with Twilio versus the RRS using Calendly Pro, please click [here](#).

---

## User Testing & Refinement

The RRA and RRS went through three rounds of testing. After each round, the RRA and RRS were refined based on user feedback.

### Round 1

The first version of the RRA can be accessed [here](#) with code found [here](#). Version one of the RRA links to a version of the [RRS](#), which was built using docAssemble with Twilio.

Round 1 testing was one-on-one observational testing with Sarah Boonin. Professor Boonin went through the RRA and RRS and provided verbal feedback throughout testing. Notes from Round 1 testing can be found [here](#).

Based on round 1 testing, the following changes were made to the RRA and RRS:

- Language used in the RRA was simplified to be more accessible to users
- Questions were rephrased and the flow of questions reworked
- Questions were personalized so that instead of referring to “the respondent” the question states the name of the respondent, such as “Jack Jones”
- Added web links to court documents when the document is referenced
- Drop down option of all the courts was added so users are not required to type the court name
- Word max was added to paragraph answers
- Removed the final “continue” button from the last page of the RRA
- Added court document *Review Order of Antipsychotic Medication* with document filling
- Added docket number and other variables to autogenerate the court documents
- Edited the “next steps” checklist by adding court addresses, helpful resources, and other features

### Round 2

Mary Ursul, a lay person who is unfamiliar with guardianship, tested an updated version of the RRA that incorporated edits based on round 1 testing. Due to concerns about the ability to reschedule text reminders with version 1 of the RRS and the RRS scheduled texts failing, Mrs. Ursul did not test the RRS. Like round 1 testing, round 2 was one-on-one observational testing. Mrs. Ursul provided verbal feedback as she went through the RRA. Notes from round 2 testing can be found [here](#).

Based on round 2 testing, the following changes were made to the RRA:

- Working links that do not require downloading Adobe were added for court documents
- Information on the ability of users to save and continue the interview was added to the first page of the RRA

- Parties' last names and suffixes were added to the interview questions and the "next steps" checklist

### Round 3

The version of the RRA tested for round 3 incorporate edits from both rounds 1 and 2 testing. Round 3 testing was completed by two Health Law Clinic students. Unlike the previous rounds, round 3 was not observed. Instead, round 3 as completed by the students on their own and feedback was provided using a google form, found [here](#). User feedback responses can be found [here](#).

Based on round 3 testing, additional informational text was added to the RRA.

### RRS Testing

After multiple attempts to fix version 1 of the RRS and incorporate solutions to issues identified in round 1 testing, I retired version 1 of the RRS and moved away from using docAssemble with Twilio.

Version 2 of the RRS uses Calendly Pro and was tested by me. I ran tests to ensure the scheduled text and email messages successfully sent. Version 2 of the RRS was successful and incorporates solutions to the issues identified in round 1 testing.

### Final Version

The final version of the RRA, which links to the RRS, can be found [here](#). The code for the final version of the RRA can be downloaded and viewed found [here](#).

---

## Product

### Introduction Pitch

The slide deck for the introduction pitch given in class on October 28, 2019 can be found [here](#).

---

### Complexity & Robustness

The RRA interview questions flow based on the user's answers. At the end of the RRA, users are provided with autogenerated court documents and a personalized "next steps" checklist.

The RRS is build using Calendly Pro and provides personalized scheduled text and email reminders.

---

### Impact & Efficiency

The RRA removes repetitive questions and decreases the amount of time it takes users to fill out court documents. To accomplish this, I reviewed each court document and, using a spreadsheet located [here](#), identified and eliminated overlapping questions.

As a result, the RRA decreases the number of questions users may be required to answer on court documents from 117 questions to 90 questions. This number may differ based on the answers the user provides in the RRA. Round 3 users reported that they spent between 10-20 minutes completing the RRA interview and thought that they thought the RRA saved time.

The impact and efficiency of the RRS can only be speculated because of the lack of real-world testing. If the RRS were used in a real-world setting it would be interesting to see how many guardians retained Rogers authority compared to a year without the RRS. The RRS has the potential to reduce court time for guardians who would have otherwise lost their Rogers authority and been required to go through the process of obtaining Rogers authority all over again.

---

## Documentation

The RRA provides users with help text throughout the interview and links to court documents that are referenced in the interview. The RRS also links to the *Review Order* court document and the specific item on the document where the Roger Review date can be found.

Additionally, I created “next step” checklists for each probate and family court so that users have the address of the court where their Rogers Review hearing is. The documents are linked below:

- [Suffolk Checklist](#)
  - [Barnstable Checklist](#)
  - [Berkshire Checklist](#)
  - [Bristol Checklist](#)
  - [Dukes Checklist](#)
  - [Essex Checklist](#)
  - [Franklin Checklist](#)
  - [Hampshire Checklist](#)
  - [Middlesex Checklist](#)
  - [Nantucket Checklist](#)
  - [Norfolk Checklist](#)
  - [Plymouth Checklist](#)
  - [Worcester Checklist](#)
- 

## Real World Viability

The RRA, minus the RRS, is ready for real-world use. The RRS is a proof-of-concept and the Health Law Clinic must determine whether it wants this version of the RRS. If the Health Law Clinic determines it wants this version of the RRS, then the RRA and RRS are both real-world ready

If, however, the Health Law Clinic chooses to forgo the RRS, then all references to the RRS must be removed from the RRA interview and from the “next steps” documents. This is a simple alteration that will take less than one day to complete.

---

## Sustainability

A plan for the continued use, maintenance, and updates for the RRA and RRS can be found [here](#). The Health Law Clinic’s LIT Fellow will be responsible for sustaining the RRA and RRS in accordance with the maintenance plan.