

Adult Guardianship Petition QnA Interview

By Michelle Missigman

I created a bot that will assist *pro se* parties in figuring out whether an adult guardianship is the right choice for their situation, assists in filling out some of the form, and provides a list of next steps to take after the interview. I worked with my Suffolk University Health Law Clinic supervisors, Sarah Boonin and Ben Golden, in order to tailor the questions to create a user-friendly and easy to use interview that results in a partially completed adult guardianship petition along with a summary of the recommended next steps to take for the user.

You can check it out at: https://mmissigman.github.io/ctl_final/AdultGuardianshipQnA

Intro Pitch

Check out my short powerpoint on this Adult Guardianship QnA here:

https://docs.google.com/presentation/d/1tvSjXPetaOMfMzIOA8MI2nLB_bMi97GhbMI2K_M2Q30/edit?usp=sharing

Framing

A vast majority of cases that go through the Probate and Family Court are *pro se*, meaning that the parties are representing themselves without an attorney. Navigating the court system, what forms need to be filled out for a particular petition, or simply filling out the right information on a form can be extremely difficult for someone who has never been through the process before. This Adult Guardianship Petition QnA Interview will walk *pro se* parties through the more substantial parts of the adult guardianship form that require a bit more explanation than what is currently available on the form. For example, the form differentiates between a limited and a general guardianship but provides no examples or explanation for what each means. My form goes into a bit more detail and helps the user choose whether a limited or general guardianship is the best choice for them.

Research

I worked in the Health Law Clinic at Suffolk University this past semester and we deal with a lot of guardianship cases, so I already did a lot of the research for this project as a part of my work in the clinic. The process is explained in certain areas on mass.gov, but it can be difficult to navigate the website and find the right forms, so I felt that a more practical solution was needed that gave all the information in one place.

Last year, the health law clinic had a legal innovation technology fellow that was working on a similar form using a different software called Guide and File, but he was unable to complete the form before the end of his school year. I met with this student early on, before I began work on this project, to see what issues he encountered when completing this project and found that a number of his issues were due to the software he was using and being unable to come up with a solution to those issues. I decided that I would continue his work, but on a different medium so that I could maybe address some of the issues he was having. I asked the previous student for

permission to use some of his research and he provided me with some of the work he did, which was very helpful when I began my work on this project.

A majority of my research came from figuring out what external links and documents I could add to my QnA interview in order to better explain the concepts and terms within the adult guardianship petition. I found a number of helpful documents online and through the mass.gov website that I linked on the QnA interview.

I also did some research on whether I could provide a form such as this one online for *pro se* parties, as it could be considered legal advice which may create an attorney-client relationship. After some investigating, I found that most other websites that provide legal advice or information provide a notice somewhere on their website letting the user know that all information used on the website is for informational purposes only and that the information found does not create an attorney-client relationship. Most websites also recommended the user see an attorney or provided a link to find an attorney. I dealt with this issue from the start of my QnA interview by providing a note at the top stating all this information.

Ideation & Prototyping

After determining what project I would be working on, I looked at what options were available to me as well as my current knowledge in coding and felt that a QnA interview would work best. I felt that a QnA interview would work best as an educational tool because it could act as more of an interactive conversation instead of handing the user a list of everything that needed to be done, which can be overwhelming for someone who has never done a guardianship before. The adult guardianship petition mentions many terms that require additional explanation and the QnA interview goes through each term one by one, so the user is not bombarded with bunch of brand new information all at once.

I also wanted to have a partially filled out downloadable petition at the end of the interview along with a page summarizing the next steps to take, but none of the other mediums we were taught during class provided a more effective way to do this than QnA.

User Testing

A majority of my feedback was during one-on-one meetings with Ben or Sarah. I was able to receive a list of what needed to be improved or worked on from Sarah and you can find some of Sarah's her feedback and suggestions here: https://mmissigman.github.io/ctl_final/AGPFeedback.pdf. I also had a couple of non-law student friends go through the QnA in order to provide feedback from someone who doesn't have prior legal knowledge. This was mostly informal and just texting back and forth feedback, but they were able to assist me in refining some of the questions so that the explanations made more sense.

Refinement

My initial prototype can be found here: https://mmissigman.github.io/ctl_final/QnADraft.html

I refined a number of questions as a result of Sarah's feedback, for example the question regarding why the proposed guardian is interested and some of the explanations I provided for the a Rogers Guardianship. If you compare the two versions, you will see that I made a lot of changes based on Sarah's feedback.

My initial prototype was very simple, went through the questions on the form, and provided some explanations here and there. I used a lot of the questions from last year's student and just refined them or provided some additional explanations. As I spoke with my supervisors throughout my work on this project, they recommended that I provide fuller explanations for the more important terms. For example I briefly went over that we would be referring to an "incapacitated person" as the "Respondent," but provided no explanation as to what an incapacitated person was in my first prototype. So, in my revision I made sure to provide the definition of an incapacitated person and provided a bit more clarification.

One of Sarah's main concerns was the effectiveness of the interview if it was only providing a partially completed petition, but I explained to her that I would have to add a line for each person's first name, middle name, last name, address, relationship, etc. and that this would make the interview extremely tedious and time consuming. The interview could go from being completed in 30 minutes to taking over an hour due to how many names and addresses would have to be asked about. Instead, to address her concern, I made the form into a word document with text boxes over each section that required filling out, so that once the user downloads the petition they could easily enter in that information themselves. I also made sure to mention that this information needed to be completed in my next steps, which can be found here: https://mmissigman.github.io/ctl_final/AdultGuardianshipNextSteps.docx

In this project, I had the most trouble with configuring the QnA questions to the word document, having it completed properly, and downloaded. I initially planned to have two separate documents be downloaded, but the QnA was not recognizing the second document that I placed into the code. I also had a user issue where once the user clicked "Download Petition" the QnA would open up another page to download the document and the user would be more likely to forget to go back to the QnA and click "Download Next Steps" for the other document. I fixed both issues with one solution, which was to include the next steps document into the first page of the petition. This made it easier to download and it eliminates (or largely reduces) the likelihood of the user not reading or overlooking the next steps document.

Moving Forward

This project is ready to use as is, but I think it can still use some additional user testing, refinement, and could benefit from some additional questions or information. After speaking with Sarah and Ben in my last meeting with them, they recommended having this project be the subject of one of our clinic seminar classes next semester so that I can receive feedback from the other clinic students and what they think should be improved on. I agreed with their

recommendation and we plan to make time next semester to speak to the class about this interview and any other improvements that can be made.

In the future, this interview could be used in the clinic when we encounter prospective clients that don't meet our low income requirements, we could also give the project to Volunteer Lawyers Project or other non-profit legal organizations. It is easily accessible online and easily distributable as it is right now.

I hope that once I receive more feedback from the clinic students that I can refine this project some more and make it look polished.