Probate Bond Form

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Framing:

   I aimed to resolve the issue of liability/wrongdoing when it comes to estate planning. When someone goes through the estate planning process, they want to make sure that their wishes are granted after they pass and that the parties responsible act in the best interest of the beneficiaries. This is where a probate bond form comes in. The purpose of a probate bond is to hold whoever is the fiduciary such as an administrator or executor accountable and liable to ensure they perform their duties in good faith. Estate planners and in turn beneficiaries are the biggest stakeholders because this form allows for civil recourse in the event their appointed fiduciary acts in bad faith. The courts are also a stakeholder because the probate form allows for a streamlined process if a fiduciary duty is violated and prevents a claim having to go through the court systems which takes time and money. The current form, although only two pages, can be confusing for some users, so my goal was to automate the process for a much easier and simpler option by using the assembly line to fill out the form in an interview style solution. The interview allows the user to only have to focus on the question in front of them and not be overwhelmed by any legalese that may be on the form.

Research:

   After speaking with my family law professor to get a better understanding of the purpose of the probate bond I realized how important it was. He described the bond as protecting someone's final wishes. Luckily in Massachusetts probate bonds are required unless granted a specific waiver. The current option is to have at least one fiduciary fill out the form and then have potential suretors also fill it out before filing it with the court. Although Massachusetts requires the probate bond a lot of states do not, including my home state of Maine. Upon researching the probate bond, I realized a current issue in my hometown where a fiduciary had breached his duty and left a mentally incapacitated person homeless. Thankfully, our community came together to ensure he had a roof over his head and local lawyers took on his case. However, had there been a probate bond the fiduciary would be strictly liable and must compensate the individual for his negligence and bad faith. After reading about a current situation at such a personal level I knew I wanted to work on this form and at the very least raise awareness of its importance.

Ideation and Prototyping:

   Because I understand my limitations when it comes to coding, I thought the Assembly Line would be the best way to produce a MVP. In a previous lesson we worked on QnA mark-up, but I felt I could make a more sophisticated product through the DocAssemble playground. Also, I liked the steps laid out such as the planning your interview which allowed me to figure a lot of stuff out on my own and facilitated my learning in coding. Because of the Assembly Line I knew if my form needed more work following the semester there would be other coders to work on it and ensure it becomes viable.

User Testing:

I did the majority of the user testing because I believed that would be the best way to ensure each possible outcome of the form would be tested. However, I did send the form over to family and friends and did my best to assign them different roles so they could test it and give me a second set of eyes. I had each friend and family member fill out a small feedback document which is attached as a separate document.

Refinement:

As I was working in the playground, I did a lot of testing myself and hit a lot of issues. Shoutout and big thank you to Professor Colarusso, Michelle, and Bryce for their patience working with me. When I sent out the interview for user testing, I felt like I had a solid interview. One of the issues was the formatting of the steps on the opening page. Because that is an automated question and not something I implemented I am unsure how to change it. Another question was about the code on the top I am assuming that's a playground thing and a formatting issue of sending out my interview with the link and not a representation of the final user product outside the DocAssemble. I asked Michelle about the best thing to do with regard to phone numbers. She said DocAssemble has specific code to know when something is a phone number format but I had deleted it when I implemented my own users[] information. She thought the best thing for me to do was keep it as a text and not use number or integer datatype. I did however put no spaces or dashes in the question. Which can be seen under the Refined Final commit. Another issue is having the same person sign for fiduciary and surety which I will discuss in the sustainability section. I do not have multiple versions on my github because I did not know how to save it there instead, I downloaded the yaml file thinking that was how to save it periodically. If the yaml's are needed, please let me know.

Complexity and Robustness:

This project involved document automation from a data source outside my control. I used Documate, Weaver, and DocAssemble to put together a comprehensive set of questions and coding logic to allow a user to fill out a form. Although I knew absolutely nothing about coding coming into the class, I feel like I learned a lot about understanding code and also how to use small pieces of it. Although my interview may not be as sophisticated or complex as I had liked it was the best MVP I feel I could produce given my knowledge.

Impact & Efficiencies:

I think the interview format of filling out a form reduces the time expended significantly. Just by looking at the user testing feedback you can see how quick it took to fill out an entire form. It may be faster to get the entire form filled out by running through my interview then it would be to print out the form and find a pen.

Fit/Completeness:

I think improvements could be made but overall filling out an interview to automate a form is way better than finding it, downloading it, printing it, filling it out, possibly re-uploading it, and then submitting it. Given the archaic status quo the final product I have produced is a solution. Another advantage of automated forms is the clarity of computer text sometimes I can't even read my own handwriting and who knows how often messy handwriting can impede courts.

Documentation:

I think there is enough documentation to address user needs. I think the probate bond form is fairly but also can be overwhelming so just by segmenting the questions, so the user is only looking at one thing at a time is very useful. I think my questions and fields are pretty clear as well and got no confusion feedback in the user texting.

Real World Viability:

In terms of real-world use, the interview produces a viable product. However, I think the main concern may be with the suretor sections. It would be beneficial if the form or a link could be sent to a second party or allow for multiple parties to fill out at once. This would allow for the suretor's to be in different locations then the fiduciaries. However, if all parties are negotiating or working together in the same location then the interview is perfectly viable. If necessary, the bond form can be applied without suretors and may be a more realistic real-world application.

Sustainability:

The project is part of the Assembly Line now and can be implemented as such. However, some of the fields are not in the usual DocAssemble format and I am unsure whether the Assembly Line aims for uniformity across all its forms. Another issue may be that the probate bond form usually attaches with estate planning or other form and therefore might need previous forms to be implemented before attaching this one.