Document Assembly Line Project: Citation to Discover Assets to Debtor's Employer
https://github.com/wmccarthy/ctl/blob/main/Cit_Debtor_Employer_v4.yml
Citation to Discover Assets to Debtor's Employer

Framing:
I am working with ILAO, using Docassemble, to automate the court document, Citation to Discover Assets to Debtor's Employer. ILAO works to provide services to those with the least amount of access to justice. The users of the project will be the same people trying to access justice through ILAO.

Research:
My research started by getting in touch with Professor Colarusso, and him putting me in contact with Matt Newstead from ILAO. Matt explained that ILAO moving their automated forms from their website, Law Help Interactive, to Docassemble. From the meeting, we decided that I'd work on the *Citation to Discover Assets to Debtor's Employer* form. The *Citation to Discover Assets to Debtor's Employer* is a post-judgment collection form used by individuals who've won a money judgment from the court to get information about the debtor's earnings from their employer.

Current Solutions to filling out the *Citation to Discover Assets to Debtor's Employer* form:
  - ILAO's guided interview
  - Using IL Courts website to fill out the form manually
      o Getting Started
      o How To Do
      o Citation to Discover Assets to Debtor's Employer

Ideation, Prototyping, and User Testing:
I created my prototype of the program by taking the form as a pdf, putting it through Gavel, changing the labels, then putting that through Weaver, changing the information screens and the order of the interview, and then uploading that to Docassemble.

User Testing:
A majority of the user testing was self-testing because I had to go through Gavel, Weaver and DocAssemble a couple of times in order to get the information screens, interview order, and labeling on the output of the document correct. I also used ILAO's guided interview and the IL Courts website as a template for drafting my interview.

Once I had a runnable program working, I was able to run it with friends while studying for finals. Later into the process, once I was happy with the work that I've got, I sent the program to Matt Newstead for some final testing

See emails between me and Matt Newstead (ILAO) sent via email – 12/13/23 - Subject Line: Coding the Law Final Project

Refinement:
Gavel:
Because of the way that Weaver and Docassemble work, I had to go through a couple of versions of the pdf in order to get the correct labels that I wanted for inputting. I ended up staying away from the preset labels like "plaintiff" and "defendant" because I wanted to be able to customize the question instead of having the built-in questions Docassemble uses.

<u>Weaver</u>:
My next hurdle was using Weaver to create preset Docassemble interview. This took a couple of iterations. In creating some of the introductory information screen, I started out with one big screen with all of the information on it. I used the above links from the Illinois Courts website as well as ILAO's guided interview to formulate the introductory information.

I then went through Weaver again to break up the information across multiple smaller information screens. While re-doing the information screens, I also re-ordered the preset interview order from Weaver to more similarly follow ILAO's guided interview. From this point, I had a program in Docassemble that I could run all the way through to the end.

<u>Docasseble</u>:
Once I had a runnable program working, I then went into the code. Even with the information split into smaller screens, it was still a lot of text on one screen. To account for this, I found a way to implement a "help" or "more information" button using Docassemble's documentation. This way, users would get enough information to answer the question without being overwhelmed, but if they were still confused or needed more information, they could click the button and show more information. I was also able to add hyperlinks into the "more information" sections to go to other websites for help.

Some other small refinements included re-labeling fields where users entered information. For the address lines, I used the fields "street, apt. #" and "city, state, zip" instead of just "address line one" and "address line two". I was also able to change the court time to show a pull down menu for different times instead of having the user enter the time manually.

There were some issues with formatting when downloading the document, so I had to go in and re-format the way that Docassemble entered the information into the document.

Intro Pitch:
See email – 12/13/23 - Subject Line: Coding the Law Final Project

Complexity/Robustness:
As a beginner to coding, this project was pretty complex. I had to use Gavel, Weaver, and also code in Docassemble, using python. I was able to create new question blocks and insert them into the interview. I also edited the pre-set question blocks, changing the datatype or the formatting of the question. In the code for the interview order, I was able to add in logic so certain questions would only show up if the user selects a specific prior answer.

Impact & Efficiencies:
Yes, the project has helped ILAO get a head start on switching over from Law Help Interactive to Docassemble. Matt noted that it will be able to give them ideas on how they will build the program according to their organization's style.

Fit/Completeness:
In the end, the goal was to create a level one form with the hope of getting to an MVP and I believe I was able to attain at least a level one form. I was able to run through the program and have it spit out a filled out Citation to Discover Assets to Debtor's Employer.

Documentation:
Documentation is included in the final project. I've included help buttons within the interview that also link the user to ILAO's website and to the IL Courts website.

Real World Viability & Sustainability: The goal of my project was only to create a level one form. I believe that Matt and ILAO will be building their own Docassemble form using mine as a template or guide.