

# Tech Enabled Self Help Centers

## **Document Assembly, Telephone Hotlines, and Web Initiatives being used in Self Help Centers**

NLADA/ABA Equal Justice Conference, Orlando  
May 15, 2009

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# Commonalities

Sense of urgency

Pulse of demand-awareness

Focus on access/keeping the doors open not  
stopping at the end of the list

Using technology to overcome barriers language,  
distance, process/complexity of legal process



# Commonalities

Set up of document assembly projects very similar:

Triage

Space to work on documents

Space to review one on one documents

Terminals that SRLs can use

Use of statewide website for referrals info both at hotline and SHCs



# Hotline: Alaska

100% hotline self help center

No office/location to visit, all contact is on the phone

Comprehensive website with forms and information

Serves statewide population

Facilitators (non-attorneys) provide detailed information about family law procedure & options for forms

Attorney Director stays in touch with local court practices by court visits, email and phone

All courts refer self represented persons to the hotline



# Alaska: Unique characteristics

Population is spread out across an enormous geographic area,  
most without road access

2/3 population served by the self-help center is at or below the  
poverty level

85% have internet access and email addresses

Serve 7,000+ callers per year on helpline

Website gets over 70,000 hits a year

Do statewide outreach to different providers who have contact with  
self-represented litigants (tribal offices, public libraries, social  
workers, drug and alcohol treatment providers, public health  
nurses, psychologists, PDs, DAs, AGs, administrative agencies)



# Referrals

Facilitators may set up additional phone appointments to provide follow up assistance

Facilitators provide legal and non-legal referrals as appropriate

If possible, co-browse the website with the caller to show how to navigate and find resources

Facilitators send follow up emails after the call setting out in writing what was discussed with the forms attached and links to other resources



# Alaska: Level of service

Higher level of service per caller than if they had one or two offices across the state, also serve more people

Keeps phone system simple

Judges are supportive of hotline services

Litigants appreciate convenience and being able to be anonymous if they want

Helps staff avoid burnout by having physical distance from litigant

Phone equalizes public's ability to access the services – can call from anywhere in the state, country or world

No complaints filed



# Protocols

No individual records kept

Hours are 7:30-6 pm, M-Th

Facilitators rotate shifts, with 2 facilitators per shift at minimum, supervised by Attorney Director

Disclaimer always provided upfront

Email sent after the call w/discussed links to websites and forms which are drafted in Word (can be changed by litigant to suit their situation)

Staff does not fill out forms or review paperwork





# Document Assembly

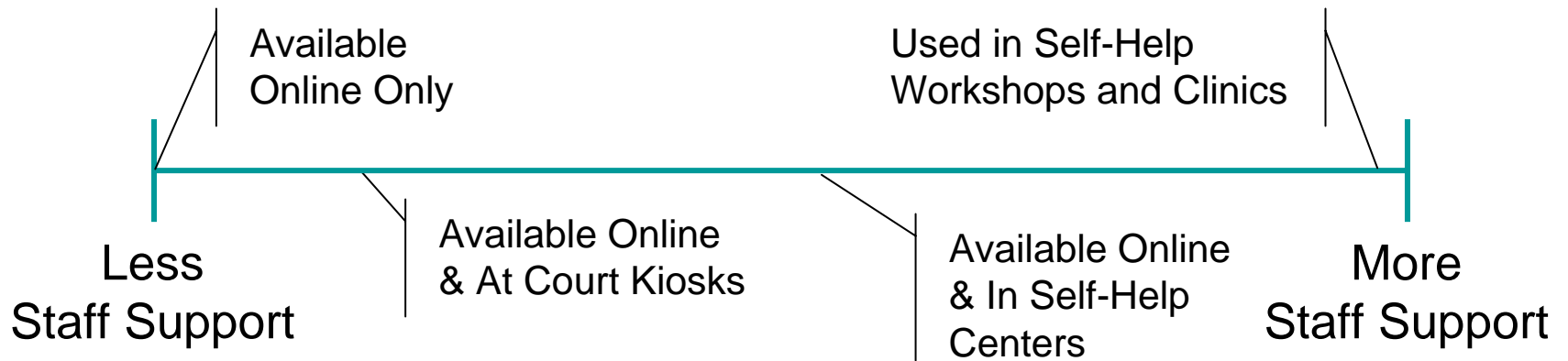
NPADO is used by many courts, including

- Idaho
- California
- New York
- Montana
- Minnesota

Courts use NPADO to support website visitors and self-help centers customers.



# How Do Courts Use Document Assembly?



# The Introduction of Automated Forms Programs in Court-Based, Court Operated Self Help Centers

Carol Austin, Communications & Technology Manager  
Law Help Ontario, Pro Bono Law Ontario (Canada)

Michelle C. Hopkins, Supervising Attorney, Resource  
Center for Self Represented Litigants, Los Angeles  
Superior Court



# Law Help Ontario





# Work Area



# Project Structure

2-year pilot project launched by Pro Bono Law Ontario  
(a charitable organization)

Located in downtown Toronto Superior Court of Justice

Staff include:

2 Coordinators (1 full-time, 1 part-time)

1 Managing Lawyer (part-time)

Summer law student



# Services

General information on rules and procedures of Superior Court

Help filling out court forms

Summary legal advice (30-minute sessions)

Legal representation at a trial or motion

Referral services

Computer kiosks

Resource materials

Workshops and instructional videos



# 2008 Service Statistics

2,900 people visited

1,100 of those met with a pro bono lawyer and/or  
received one-on-one procedural support from staff

56 law firms participated

165 lawyers provided service

3,000 court forms assembled through NPADO





## Get Legal Help

[Civil Litigation](#)

[Appeals](#)

[Life Events](#)

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## Welcome to Law Help Ontario

Law Help Ontario is a project of [Pro Bono Law Ontario](#) that provides pro bono legal services to people who cannot afford to hire a lawyer and are unrepresented in a legal matter. The project is currently piloting two self-help centres in courthouses in the Toronto area. In the future, centres may be launched in other locations across Ontario. This web site provides online resources relating to pro bono (free) legal services available to the public. Click on one of the 5 topic areas below to get started...



### Civil Litigation

Suing someone or being sued? Visit us in person in Toronto or access our online resources to help you with your civil matter.



### Appeals

Appealing a decision at Divisional Court, the Court of Appeal for Ontario, or the Federal Court of Appeal? Visit us in person in Toronto or access our online resources to help you with your appeal.



### Life Events

Check out our online resources to help you with an uncontested divorce, wills, employment, powers of attorney or other issues that come up in the course of life.



### Children & Youth

Check out our online resources and pro bono projects for help on education advocacy, and child and youth advocacy.



### Community & Cultural

Online resources and pro bono projects on advocacy for special interest groups, or nonprofit and charitable organizations.

### What's New

[VIDEO: Representing Yourself in Small Claims Court](#)

[VIDEO: Working Effectively With Your Lawyer](#)

Be Prepared! Before visiting the Law Help walk-in centre, check out this [GUIDE](#) to getting the most out of a meeting with one of our lawyers.

# Guidebooks & Tip Sheets

## Get Legal Help

- [Civil Litigation](#)
- [Appeals](#)
- [Life Events](#)
- [Children & Youth](#)
- [Community & Cultural](#)

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Building a better foundation for justice in Ontario

 Barreau  
The Law Society of  
du Haut-Canada  
Upper Canada

 LEGAL AID ONTARIO  
AIDE JURIDIQUE ONTARIO

## Civil Litigation

### Suing someone or being sued?

Visit the Law Help Ontario walk-in centre if you live in the Toronto area or view these online resources to help you with your civil matter. [Pro Bono Projects](#)

[Law Help Ontario at Superior Court](#)

[Law Help Ontario at Small Claims Court](#)

### Self-Representation Guidebooks

[Alternatives To Trial](#)

[Starting a Civil Proceeding in Superior Court](#)

[Simplified Procedure - Rule 76](#)

[Defending a Civil Proceeding in Superior Court](#)

[The Discovery Process](#)

[A Guide to Preparing Your Affidavit](#)

[A Guide to Motions](#)

[Overview of the Superior Court of Justice Process](#)

[Common Superior Court of Justice Terms](#)

[Costs in the Superior Court of Justice](#)

[More Library Resources >>](#)

### Self-Representation Tip Sheets

[Tip Sheet #1 - Motions: When Do I Appear Before a Judge or Master?](#)

[Tip Sheet #2 - How Do I Issue and Enter My Order?](#)

[Tip Sheet #3 - Costs](#)

[Tip Sheet #4 - Adjournments](#)

 [print friendly](#)

[Law Help Ontario at Superior Court](#)

[Law Help Ontario at Small Claims Court](#)



# Document Assembly

LawHelpOntario.org



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Have you received assistance at Law Help Ontario? Complete our survey and tell us about your experience.

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## Online Court Forms

[print friendly](#)

Law Help Ontario provides online court forms for people who need to access the court system yet cannot afford to hire a lawyer or to purchase templates of forms. This site offers two options for court forms -- an interactive interview system or blank Microsoft Word templates. At present, there are only a limited number of forms, but we are continually adding to make more forms available. Additional interactive forms are available at the walk-in centre at Toronto's Superior Court.

Please be sure to read and understand any instructions provided for each form before you begin. If you are a self-help user, please note that legal advice is not offered in this system. If you require legal advice of any kind, you should speak with a lawyer before proceeding. For all forms, be sure to follow the appropriate "Rules" for procedures on how to use these forms correctly. Links to the Rules are here: [Civil Court Rules](#), [Family Court Rules](#), [Small Claims Court Rules](#).

### [Interactive Forms](#)

### [Word Forms \(Civil\)](#)

## Resources

View by: [Folder](#) | [Topic](#)

Folder: [Main Menu](#) > [Court Forms](#) > [Interactive Forms](#)

### Folders

[Public Forms](#)

[Small Claims Court Forms](#)

[Restricted Forms \(Superior Court\)](#)

[Restricted Forms \(Family & Other\)](#)



Folder: [Main Menu](#) > [Court Forms](#) > [Interactive Forms](#) > **Public Forms** 

This interactive and user-friendly system is for users who need help creating legal forms and understanding legal information. If you cannot afford to hire a lawyer, this system may help you better understand the information required and assist you in properly creating the right forms for use in Ontario's court and legal system. The interview will ask you a series of questions that gather the information needed to complete each legal form.

Before you begin an interview, make sure you have all of the information you need about your case. Read through any guidebooks available on this site or the Ministry of the Attorney General's site. The interview system times out after 2 hours so you must be able to complete the interview within that time frame. Most interviews should only take 30 minutes or less.

Find an error? If you notice a technical problem in one of our interviews, we would appreciate your help by reporting it to us [HERE](#).

## Resources


### [Backsheet](#)

[LINK](#)  [» More Info](#)

### [Fax Cover Sheet](#)

[LINK](#)  [» More Info](#)

### [Fee Waiver Request Form](#)

[LINK](#)  [» More Info](#)

### [Default Letter](#)

[LINK](#)  [» More Info](#)

### [Notice of Intention to Act in Person \(15C\)](#)

[LINK](#)  [» More Info](#)

### [Notice of Intent to Defend \(18B\)](#)

[LINK](#)  [» More Info](#)

### [Notice of Appearance \(Form 38A\)](#)

[LINK](#)  [» More Info](#)

### [Certificate of Divorce](#)

[LINK](#)  [» More Info](#)

These forms are restricted and only available for use at the Toronto wa  
For users -- did you encounter an error? If you notice a technical prob  
[HERE](#).

## Resources

### [Backsheet](#)

[LINK](#)  [» More Info](#)

### [Fax Cover Sheet](#)

[LINK](#)  [» More Info](#)


### [Fee Waiver Request Form](#)

[LINK](#)  [» More Info](#)

### [Default Letter](#)

[LINK](#)  [» More Info](#)

### [Affidavit \(4D\)](#)

[LINK](#)  [» More Info](#)

### [Statement of Claim \(14A\)](#)

[LINK](#)  [» More Info](#)

### [Notice of Application \(14E\)](#)

[LINK](#)  [» More Info](#)

### [Notice of Intent to Defend \(18B\) - Word Document](#)

[DOC](#) [» More Info](#)

### [Notice of Intention to Act in Person \(15C\)](#)

[LINK](#)  [» More Info](#)

### [Affidavit of Service \(16B\)](#)

[LINK](#)  [» More Info](#)

### [Affidavit of Service \(HotDocs only\)](#)

[LINK](#)  [» More Info](#)

### [Statement of Defence \(18A\)](#)



# Computer Terminals



# A2J/HD Document Assembly



# Meeting With A Pro Bono Lawyer



# Volunteer scheduling using mybookingcalendar.com

## Law help ontario events Calendar for Law Help Ontario

All Law Help Ontario Events

March

2009

<< March 2009 >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
01	<b>02</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2)	<b>03</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2) Small Claims - (Gowlings) Spaces Available (0) Small Claims - (McCarthy) Spaces Available(1)	<b>04</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2)	<b>05</b> Full Day Session-Duty Counsel Spaces Available:(1) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(1) Small Claims - (Blakes) Spaces Available(1)	<b>06</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2)	07
08	<b>09</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2)	<b>10</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2) Small Claims - (Gowlings) Spaces Available (0) Small Claims - (McCarthy) Spaces Available(1)	<b>11</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2)	<b>12</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2) Small Claims - (Blakes) Spaces Available(1)	<b>13</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2)	14
15	<b>16</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2)	<b>17</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2) Small Claims - (Gowlings) Spaces Available (0) Small Claims - (McCarthy) Spaces Available(1)	<b>18</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2)	<b>19</b> Full Day Session-Duty Counsel Spaces Available:(1) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(1) Small Claims - (Blakes) Spaces Available(1)	<b>20</b> Full Day Session-Duty Counsel Spaces Available:(2) Morning Session - Duty Counsel Spaces Available (0) Afternoon Session-Duty Counsel Spaces Available(2)	21
22	<b>23</b> Full Day Session-Duty Counsel Spaces Available:(2)	<b>24</b> Full Day Session-Duty Counsel Spaces Available:(2)	<b>25</b> Full Day Session-Duty Counsel Spaces Available:(2)	<b>26</b> Full Day Session-Duty Counsel Spaces Available:(2)	<b>27</b> Full Day Session-Duty Counsel Spaces Available:(1)	28



# Volunteer Intake using Survey Monkey

Litigation - Pro Bono Lawyer Application - Windows Internet Explorer

http://www.surveymonkey.com/s.aspx?sm=K192YS\_2b2J0YQ3HD5BKUCUw\_3d\_3d

pro bono united states

Litigation - Pro Bono Lawyer Application

LawHelpOntario.org PBL

Exit this form >>

## Litigation - Pro Bono Lawyer Application

### 1. Civil Litigation Project - Lawyer Intake Form

Civil Litigation Projects & Law Help Ontario

If you prefer to fax this form, please print and fax to 416-977-6668.

If you have any questions or concerns, please call 416-597-0770 x 231.

**\* 1. General Information**

First Name

Last Name

Law Firm

Address

City

Province

Postal Code

**\* 2. Contact Information**

Phone Number - Law Firm

Your Direct Phone (optional)

Fax

Email

Website



All Employees are Court Staff

JusticeCorps Program

Service Delivery Model: Workshops

12 HotDocs Programs

All stages of Dissolution & Paternity



## (Pre-HotDocs) Dissolution Workshop Approach

### Divorce Workshop Series

Classroom style setting, 10-12 litigants

Litigants provided blank court forms.

Instructor leads litigants through each form, item by item, teaching necessary concepts of California law.

Litigants hand write all forms.

After classroom-style session, litigants work one-on-one with JusticeCorps volunteers to complete their forms.

Litigant given “ticket” to next workshop.



# Problems with the Pre-HotDocs Workshop Approach

Length of Time of Workshop

Litigant Fatigue

Quality of Education

Legibility & Accuracy of Handwritten Forms

Clerical Errors Causing Rejections



# Why Turn to Automated Forms?

Decrease the amount of writing for the litigant.

Decrease the length of time of the workshop.

Increase the time available for litigants to focus on key concepts and make informed decisions.

Improve the legibility & accuracy of forms.

Resources came available.



# A Solution: HotDocs

HotDocs Programs designed to be used before the start of each workshop.

The programs ask questions that the litigants can answer without any legal knowledge.

Volunteer opens HotDocs program, completes the interview with the litigant and the program generates partially completed PDF court forms.

During live presentation, the instructor teaches the legal concepts, and the litigant completes the forms, focusing on key legal issues.



# Key Features of the HotDocs Program

Litigants are only asked a question once.

The programs fill in simple information (e.g. names in captions), but also do more complex work (checking boxes if certain facts are present).

The program uses information from earlier workshops to fill in information at later workshops.

For most litigants, the programs complete one-half of the information necessary on the forms.



# Core Idea & Benefits of this Approach

## Core Idea:

Let the computer do what it does best: remember information, apply rules consistently and put information in the right place on the forms.

Let people do what they do best: understand what the litigant is trying to say and explain complex ideas.

## Benefits:

Legible, complete documents

Speed Up Time for Completion of Forms

More Time for teaching legal concepts

More Time for SRL to focus on key issues

Case management focus for SRL

Info stored for next step



# HotDocs Template Development Process

Study of the current process.

Template Developer and Subject Matter Expert.

Programs designed to fit into the process with the fewest changes.

Review of programs by Court's Attorney Manager.

Testing of programs with actual program users.

On-going support and updates.



# Challenges Overcome

Time

Money

Buy In

Training

Expansion



# Collaborations with Legal Services

Collaboration between Los Angeles Superior Court, CA  
AOC and Legal Service Providers.

Guardianship Clinic: Public Counsel

Self Help Domestic Violence Clinics: Neighborhood  
Legal Services of Los Angeles



# Guardianship HotDocs Program

Pre-HotDocs Model:

1:1 pleadings prep (up to 4 hours).

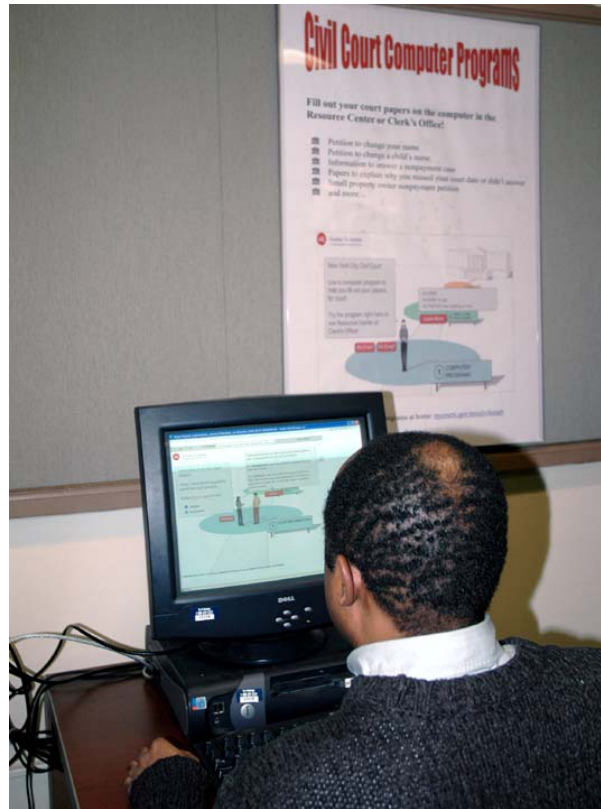
With HotDocs forms completed in 45 mins.

Expansion: Use at other self help centers with on site attorney review.

Remote Review: HotDocs PDFs and Word Declarations may be e-mailed to off site reviewing attorneys.



# Court User Completing an A2J Interview



New York City Civil Court  
Landlord-Tenant Interview



# E-mail Answer Files With NPADO

LASC is experimenting with emailing pdf files to pro bono lawyers outside the court, for review before filing.

Server allows for emails to someone else, other than the person doing the interview.



# Questions?

