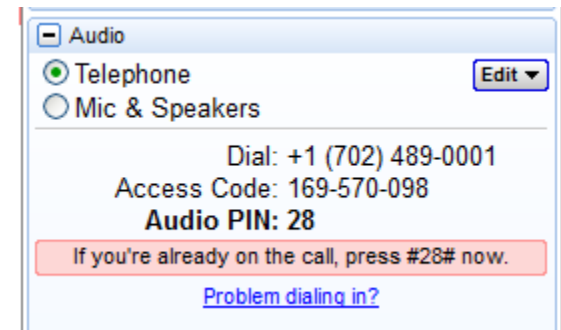# Welcome to LSNTAP's Evaluating Online Intake webinar!

If you joined the training via telephone, please select Telephone and enter your audio pin if you haven't already.

If you joined with a microphone and headset or speakers (VoIP), please select Mic & Speakers.

We will start promptly at the hour.

Audio
○ Telephone   Edit ▼
○ Mic & Speakers

Dial: +1 (702) 489-0001
Access Code: 169-570-098
Audio PIN: 28
If you're already on the call, press #28# now.

Problem dialing in?

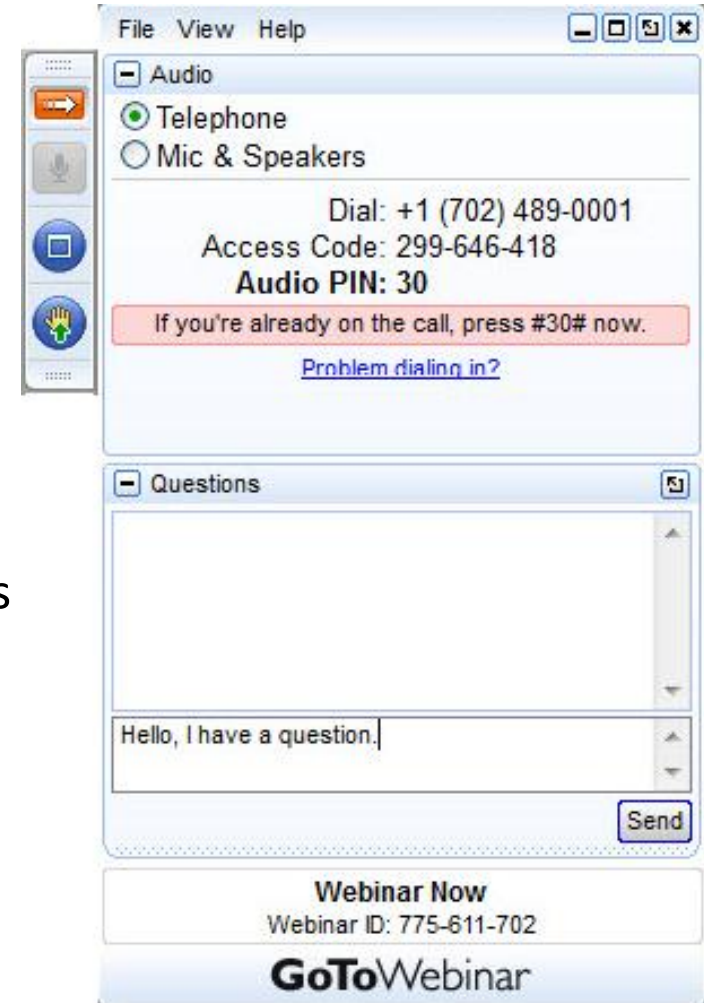# A few logistics before we start…

Maximize/minimize control panel with the orange arrow.

VOIP users select Mic & Speakers.
Telephone users select Telephone, and then enter the audio pin.

Ask a question or tell us something in the Questions box.

Raise your hand by clicking on the Hand at the bottom of the tool bar if you want to talk. (We will stop after presenters.)

LSNTAP is recording this training and will post it to their SlideShare account for the LSNTAP and SWEB websites.

Registered attendees will receive an email with a link to this information once it has been posted.

What We Will Cover Today

- How programs have implemented online intake
- What more experienced programs are learning about the impact of online intake

Moderator: Allison McDermott
Deputy Director, Pro Bono Net

Join the conversation via Twitter hashtag #lsntap

Let's Define Our Terms

Online Intake =

Online application tool
+
Online intake system

Are you doing online intake?

Let's take a poll to find out!

Who is doing online intake?

Just over 50% of the states have at least one legal aid program using online intake
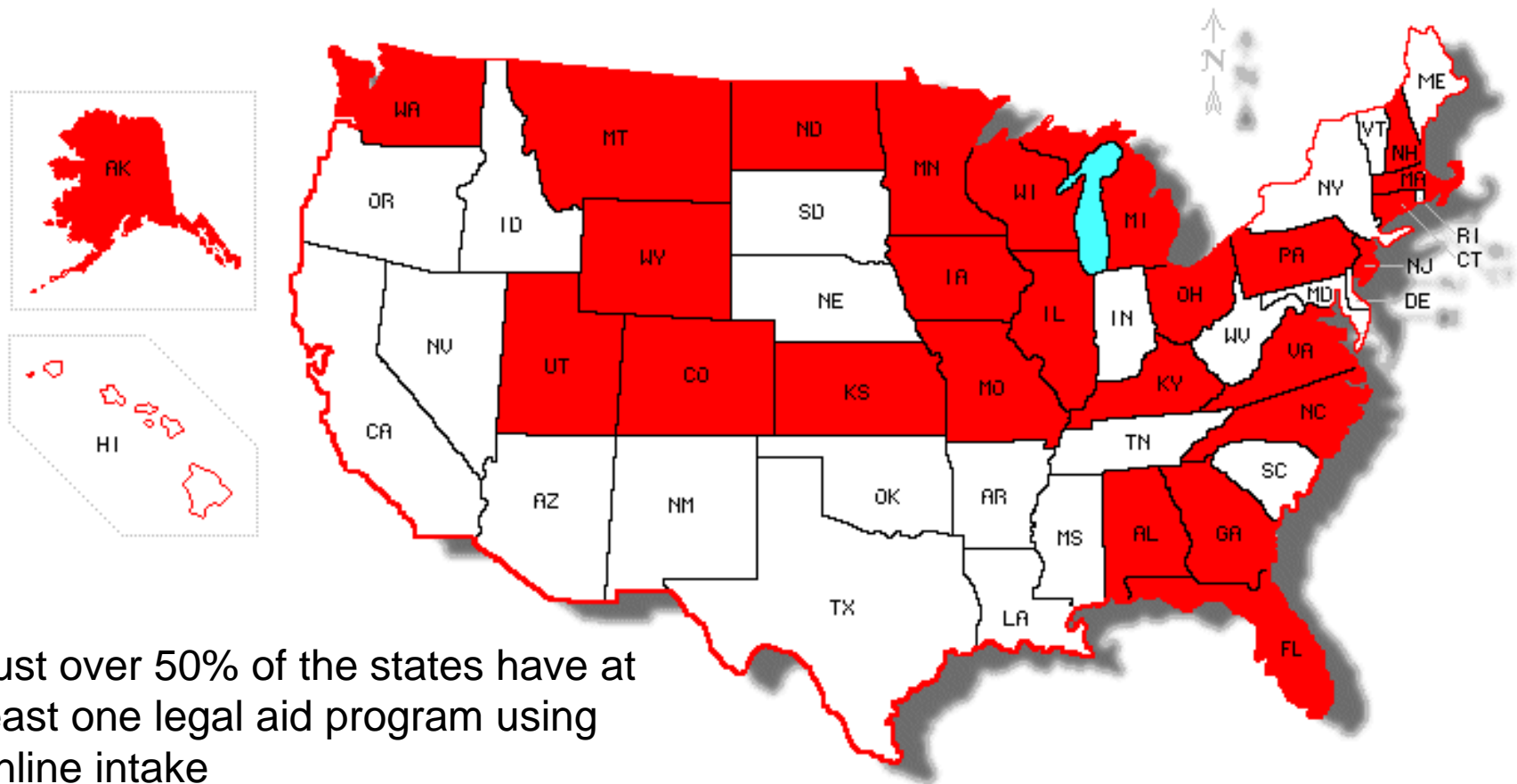
From: http://lsntap.org/content/online-intake-and-online-screen-systems-0, as of March 2012.

When did they launch?
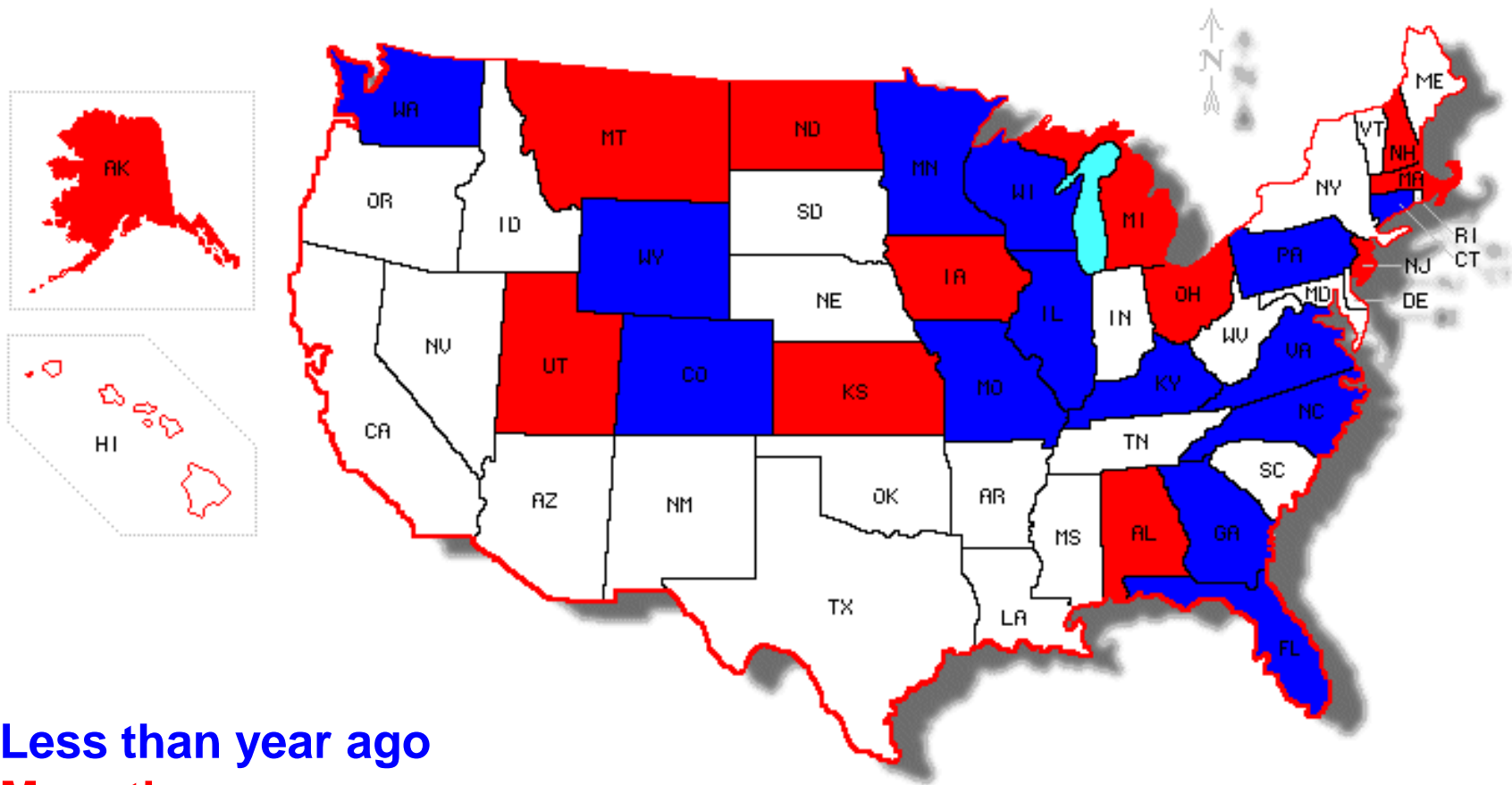
Less than year ago
More than a year ago

What tech are they using?

A2J
HTML
ASP or PHP
PDF CMS Integration
A2J CMS Integration
ASP CMS Integration
Other
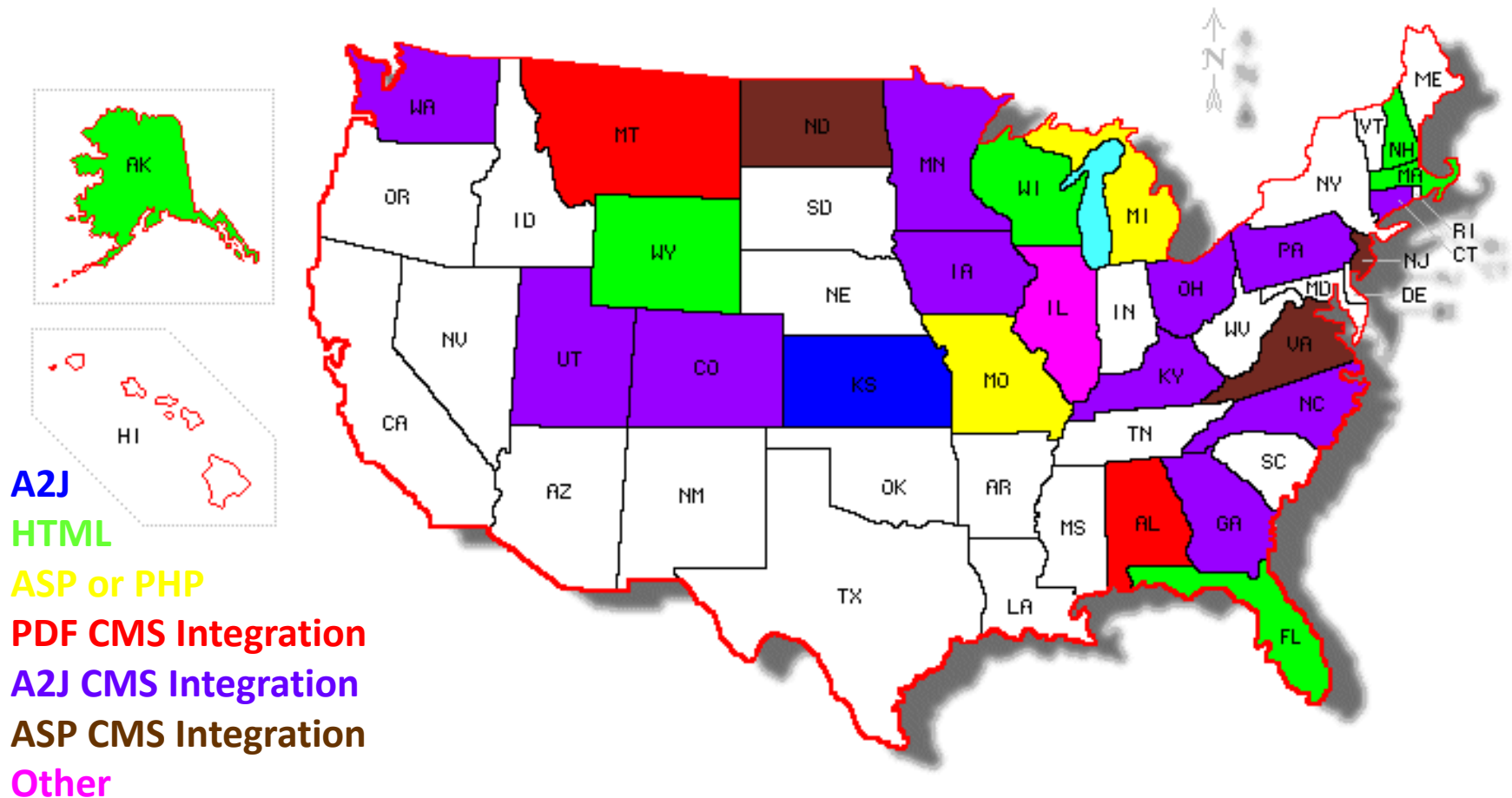
From: http://lsntap.org/content/online-intake-and-online-screen-systems-0, as of March 2012.

NJP: 7 Months In

- Triages online intake users:
  - sends those to other websites for cases NJP does not handle
  - rejects those who do not qualify financially or by type of case
  - only call back those people who had a denial of benefits case or eviction
  - All users are given resources at the end of the interview regardless of outcome

Demand is Huge

- **6394** people completed online interview
    - 704 called back by NJP as high priority cases
    - 3710 told to call as they might qualify
    - 1980 told not to call as they did not qualify and given other resources

- **1049** became NJP cases and were helped
    - 474 were callbacks (67% of callback eligible)
    - 575 had been told to call (15% of possibly eligible)

Already Learning

- Phone screening interview for online intakes takes staff half the time.

- People initially confused about when NJP would call them vs. when they should call.

- 41% found resources useful; 44% did not use the resources.

Let's Hear from Our Learned Peers

Debra Jennings
Managing Attorney, Legal Aid Line, ABLE and LAWO
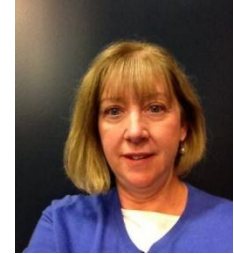
Craige Harrison
Attorney, Utah Legal Services

William Guyton, Jr.
Information Technology Manager, Legal Services Alabama

Robert Stroud
Call Center Director, Legal Services Alabama

ABLE and LAWO

Debra Jennings

Managing Attorney, Legal Aid Line

Advocates for Basic Legal Equality, Inc.

Legal Aid of Western Ohio, Inc.

Advocates for Basic Legal Equality, Inc. (ABLE) and Legal Aid of Western Ohio, Inc. (LAWO) are nonprofit regional law firms that provide high quality legal assistance in civil matters to help eligible low-income individuals and groups in western Ohio achieve self reliance, and equal justice and economic opportunity.

Legal Aid Line is a project of ABLE in partnership with LAWO.
Legal Aid Line provides intake, brief service and referrals to eligible online, walk-in, and telephone applicants for legal assistance.
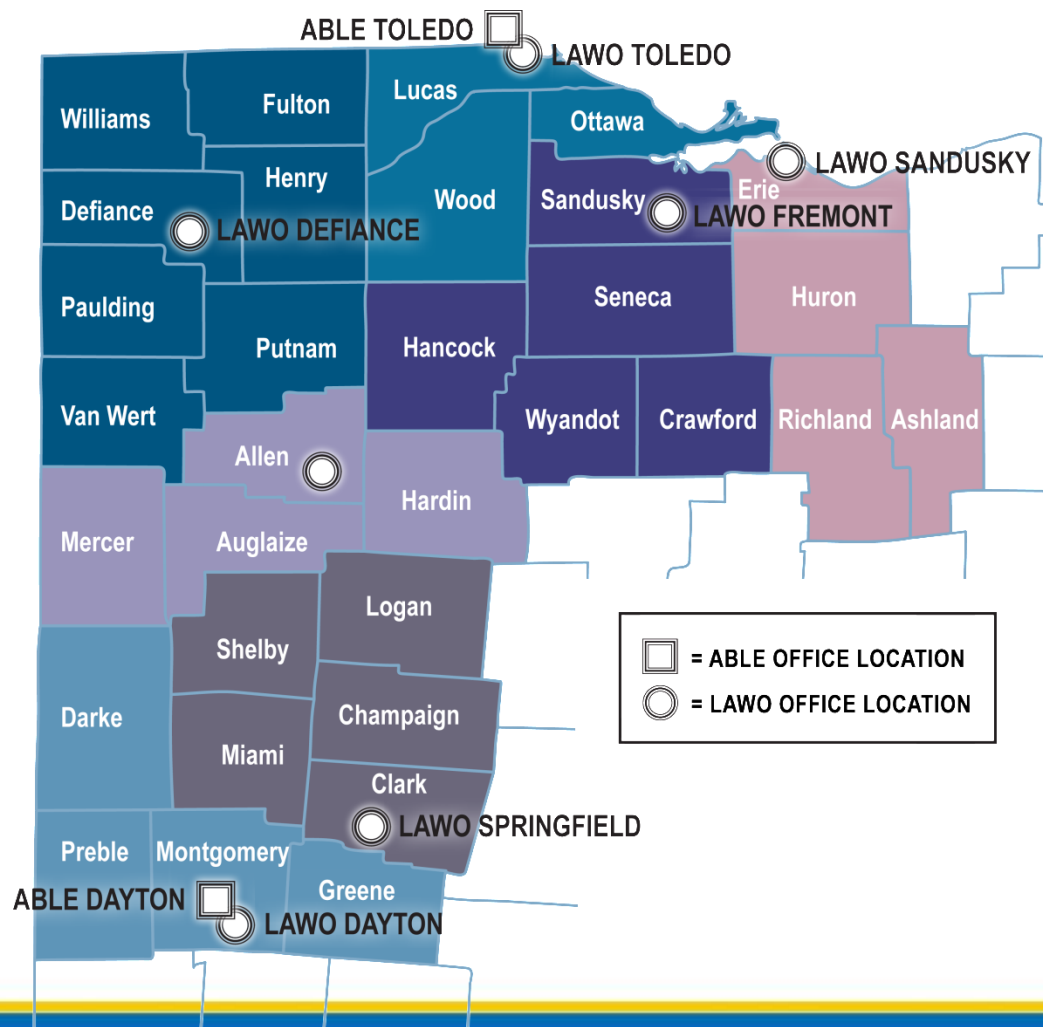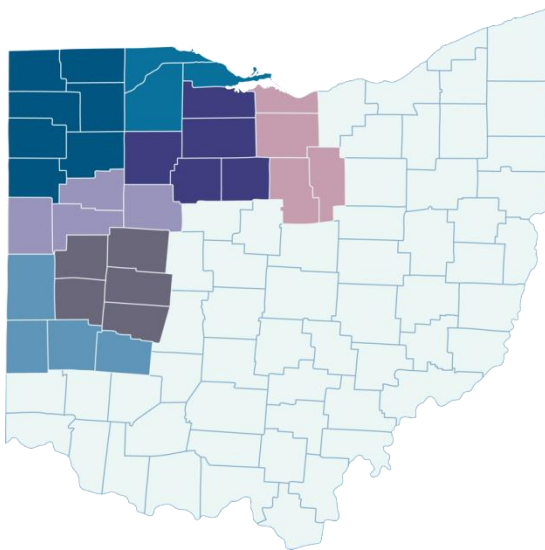
Advocates for Basic Legal Equality, Inc.

Legal Aid of Western Ohio, Inc.

LAWO and ABLE Service Areas

ABLE and LAWO have offices serving 32 counties in northwest and west central Ohio. Approximately 351,268 low-income people live in northwest and west central Ohio.

ABLE TOLEDO

LAWO TOLEDO

Williams • Fulton • Lucas

Ottawa

LAWO SANDUSKY

Henry

Wood

Sandusky • Erie

Defiance • LAWO DEFIANCE • LAWO FREMONT

Paulding

Seneca • Huron

Putnam • Hancock

Van Wert • Wyandot • Crawford • Richland • Ashland

Allen

Hardin

Mercer • Auglaize

Logan

Shelby

Darke • Champaign

Miami • Clark

Preble • Montgomery • LAWO SPRINGFIELD

ABLE DAYTON • Greene

LAWO DAYTON

□ = ABLE OFFICE LOCATION
○ = LAWO OFFICE LOCATION

By the Numbers

Requests for Assistance in 2011

- Approx 32,000 requests for assistance
- Approx 25,000 applications for assistance

Intake Access Points
- Walk In
  - 3% of total intake traffic
- Telephone (Automatic Callback System)
  - 60% of total intake traffic
- Online
  - **37% of total intake traffic**
  - Online application option since 2004
 - A2J online application since August 2009

Intake Model

Original Staffing Model:

11 *FTE Intake Specialists*
1 FTE Intake Manager
6 FTE Equivalent Attorneys
2 FTE Equivalent Contract Attorneys
1 FTE Supervising Attorney
1 FTE Managing Attorney

Original Hours of Operation:

Walk In: M – F 9am – 5pm

Telephone: M - F 9am – 4pm

Online: 24 hours/day; 7 days/week

Walk In
Telephone
Online
Applicant

↓

Intake Specialist

↓

Attorney
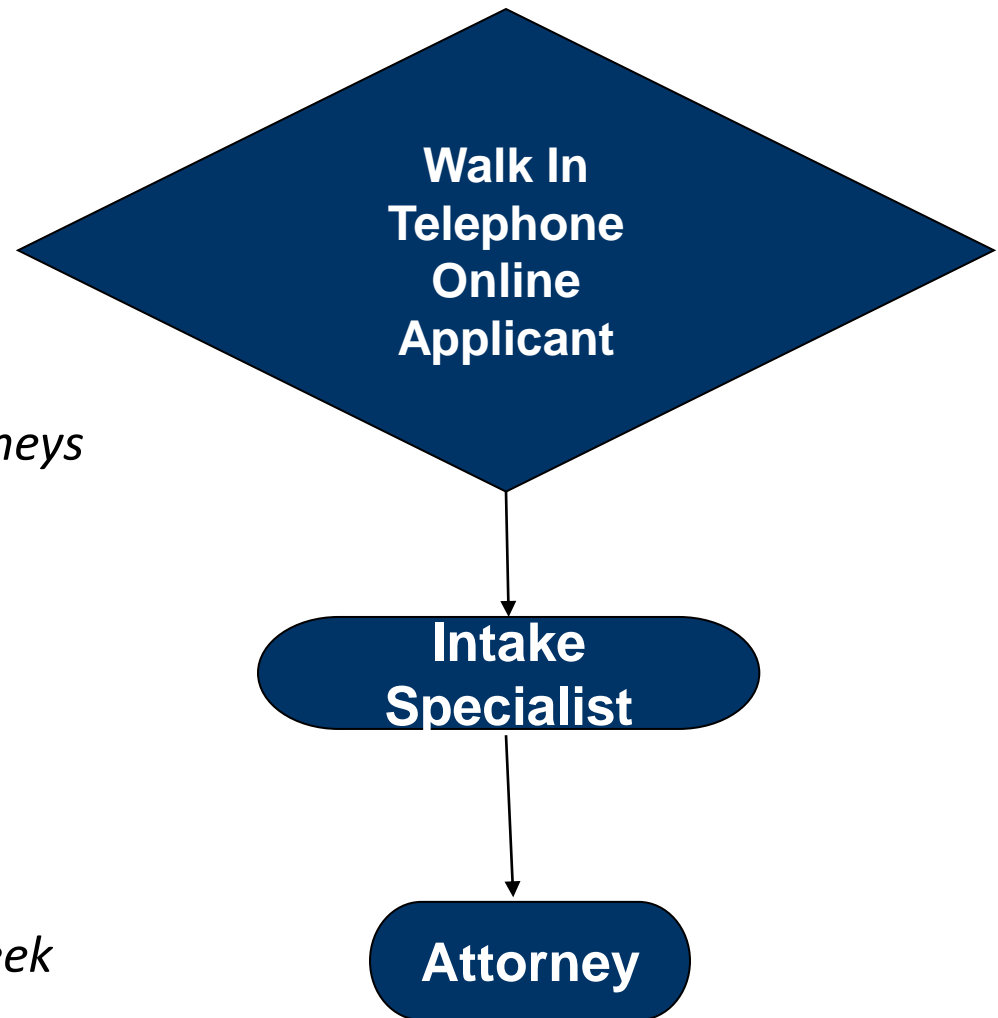
Applicant Demographics - Gender

Walk In
- − 50% Male
- − 50% Female

Telephone
- − 60% Female
- − 40% Male

Online
- − 72% Female
- − 28% Male

Applicant Demographics - Age

Walk In

- 27%   50-59
- 21%   40-49
- 18%   30-39
- 18%   20-29

Telephone

- 25%   30-39
- 25%   20-29
- 22%   40-49
- 17%   50-59

Online

- 33%   30-39
- 31%   20-29
- 21%   40-49

Applicant Demographics - Ethnicity

Walk In
- 53% Black
- 34% White
- 7.5% Hispanic

Telephone
- 49% White
- 27.5% Black
- 4% Hispanic

Online
- 72% White
- 17% Black
- 4% Hispanic

Applicant Demographics – HH Income

Walk In
- 58%   0-$9,999
- 27% $10,000 -$19,999

Telephone
- 49%   0-$9,999
- 32% $10,000 -$19,999
- 15% $20,000 -$29,999

Online
- 37%   0-$9,999
- 33% $10,000-$19,9999
- 18% $20,000-$29,999

Applicant Demographics - Education

Walk In

- 50%   High School diploma

- 20%   "Some" high school

- 15%   "Some" college

Telephone

- 44%   High School diploma

- 23%   "Some" high school

- 18% "Some" college

Online

- 43% High School diploma

- 28%   "Some" college

- 13% "Some" high school

Applicant Demographics - Other

- Geography
  - Overall applications - county of origin
    - 58% urban
    - 42% rural
  - Online applications - county of origin
    - 59% rural
    - 41% urban

- Computer Access
  - 66%   Home
  - 16%   Friend or Relative
  - 7%   Social Service Agency
  - 4%   Library
  - 3%   Government
  - 4%   Other

A2J Online Intake Efficiencies & Opportunities

- "Intake process" shortened by approximately 10 – 15 minutes
  - *Consistently accurate information*
  - *"Verify" vs. "Collect"*
- Average time to attempt first contact with online applicants
  - *24 hours (1 business day)*
- Online applicants receive helpful information based upon the legal problem selected from the A2J intake interview options and their county of residence through a software program link - ClientsWin
- Online Intake Traffic - Peak Times
  - *Afternoons; Evenings; Weekends*
- What's next?
  - *"How" client population is accessing the internet*

A2J Online Intake "Surprises"

- A2J online intake significantly reduced multiple attempts to "get through" to Legal Aid Line through available access points
- Applicants with emergencies/deadlines continue to apply online despite "warnings"
  - *Modified the online application review process to accommodate*
- Managing online applicant expectations
  - *Initial contact is an Intake Specialist vs. an attorney*
- Online applications
  - *Total traffic has actually "decreased"*
  - *Meaningful traffic has "increased"*
- Telephone applications
  - *More efficient handling*
  - *Reduced wait time*

Staffing: 3 Years Later

- By Design

  - HR Impact
    - Saved 0.5 – 1.0 FTE

  - Opportunity to shift FTE resources from online application processing to telephone processing and other projects

Staffing: 3 Years Later

- Staff Reductions – Economic Downturn
  - New Staffing Model
    - 8.5 FTE equivalent Intake Specialists
    - 1 FTE Intake Manager
    - 3.3 FTE equivalent Attorneys
    - 1 FTE Supervising Attorney
    - 1 FTE Managing Attorney
  - New Hours of Operation
    - Walk In
      - M – F 9am – 5pm
    - Telephone
      - M – F 9am – 2pm
    - Online
      - 24 hours/day; 7 days/week

Utah Legal Services

Craige Harrison

Attorney, Utah Legal Services

Utah Legal Services

► **Statewide organization**

  ► **Statewide since 1976**

  ► **<50 Employees**

  ► **4 offices, Utah's geography**

  ► **About 20,000 requests for assistance annually**

  ► **Staff of 4.3 FTE intake workers, 3.3 bilingual in Spanish**

  ► **A focus on providing an equal level of service statewide**

Online Intake System

► **A2J guided interview/Kemps CMS**

  ► **Triage for Residency, Problem Type & LSC eligibility**

  ► **Holding table for online data**

  ► **Reviewed with clients**

  ► **Imported to appropriate table (Eligibility vs Full)**

Triage System

► **Online applications**

    ► **433 unique page views last month**

    ► **87 actual submissions**

► **Online vs Telephone Eligibility screening**

    ► **Full cases: 64% vs 47%**

    ► **LSC Eligibility: 87% vs 55%**

Other results

► **Eligibility screening time decreased**

   ► **Queue times: 10 minutes from 12 minutes**

   ► **Anecdotal: As much as half**

► **Greater availability**

   ► **Urban vs Rural (55/45 vs 63/37)**

   ► **Hard of hearing**

   ► **DV victims**

   ► **Temporarily out of the country, etc.**

Discoveries

► **Putting onus on applicant**

    ► **About 15% don't follow through**

    ► **Instituted a "call" reminder which decreases it to about 5%**

► **Call back appointments – About 30% don't answer . . .**

► **Soft Financial Data**

    ► **Many misinterpret houshold/income questions**

    ► **Other Data seems fairly accurate**

Legal Services Alabama
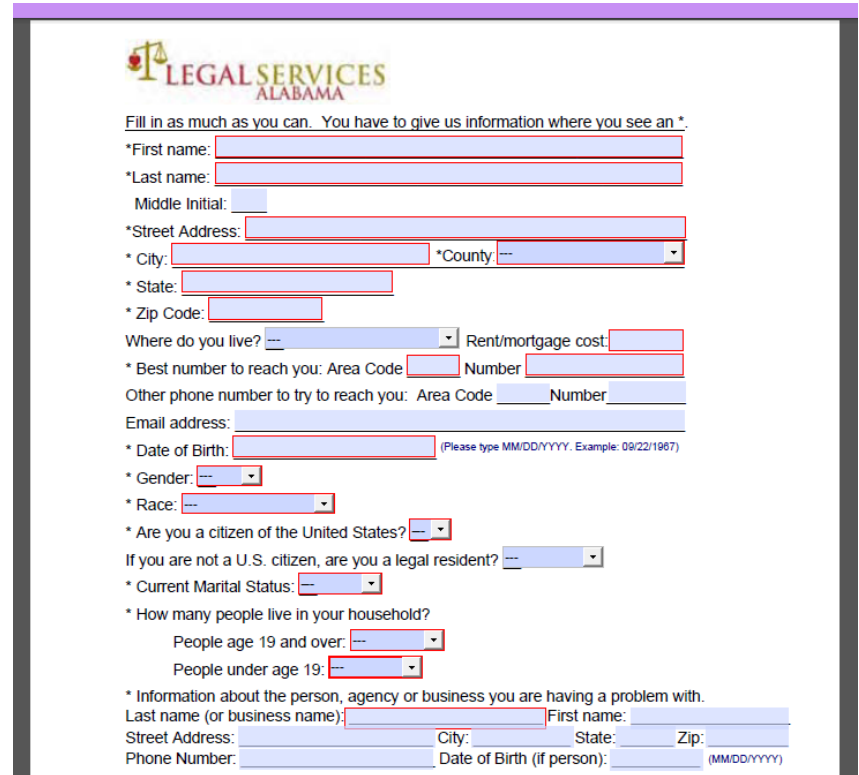
Robert Stroud

Call Center Director

William Guyton, Jr.

Information Technology Manager

Overview

- Launched in October 2009

- Uses Form Router (PDF) to send info into Legal Files CMS for Call Center staff
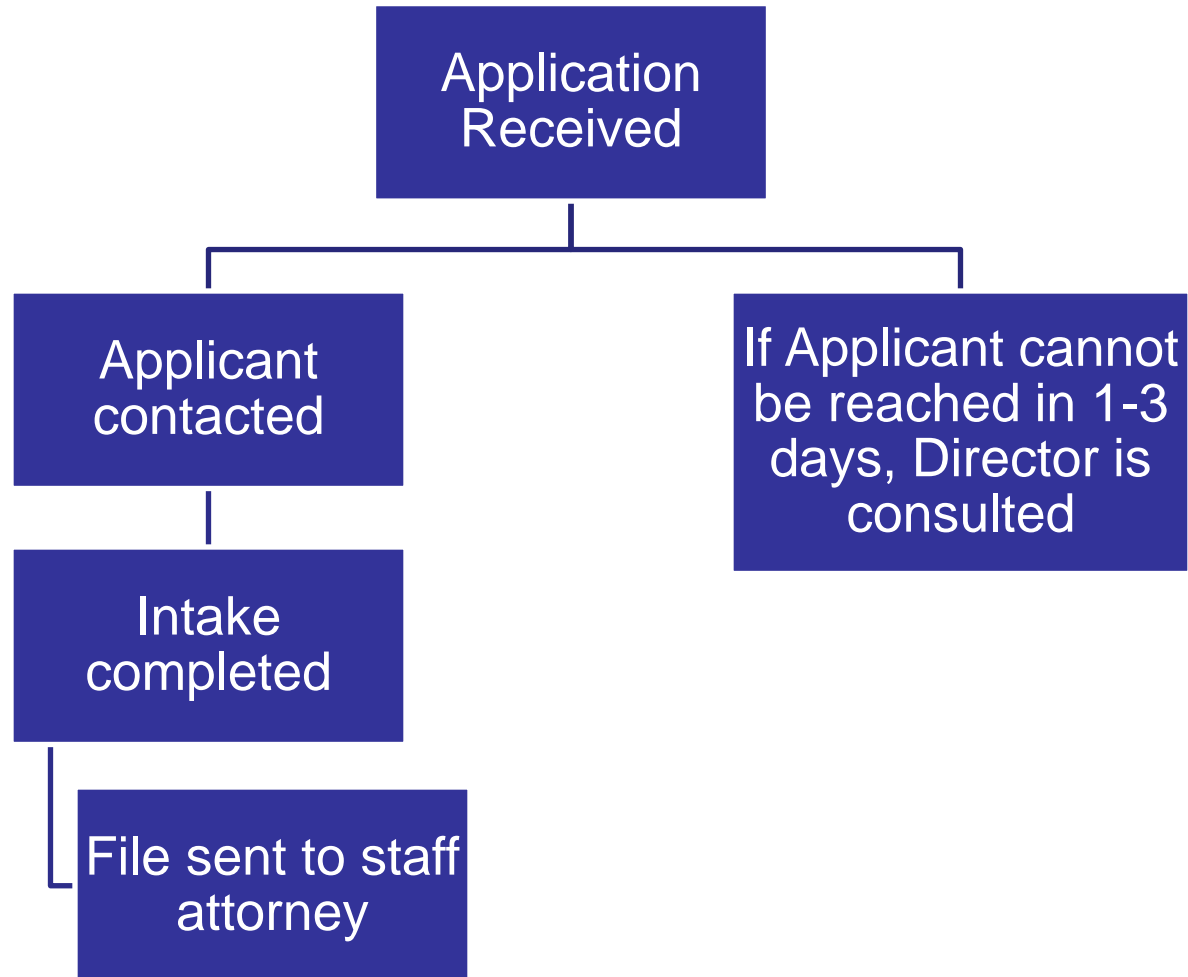
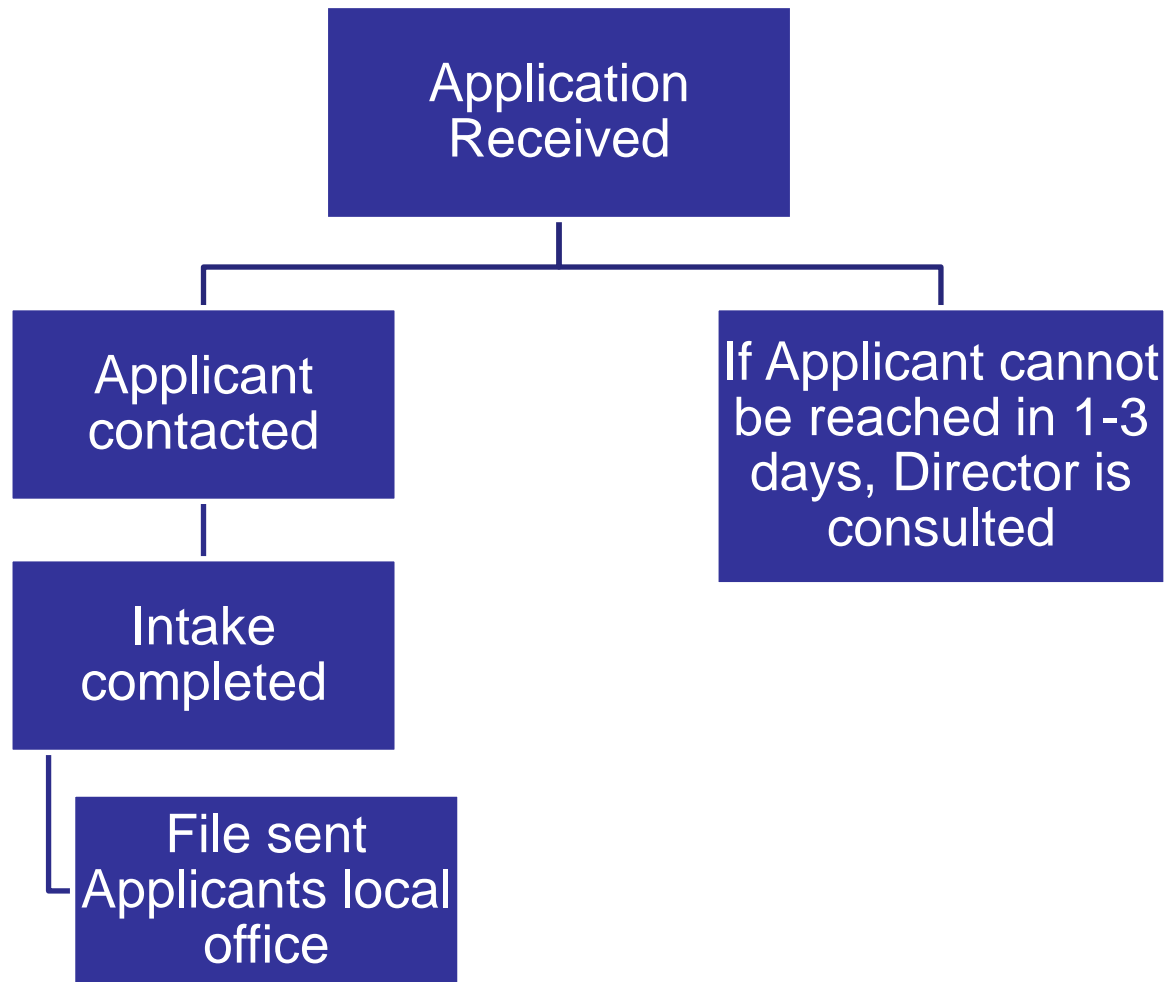- http://intake.alsp.org/

Call Center Policy Directive

Call Center Policy Directive 2012-1 is issued to maintain accountability and a continuous record of the progress and status of each case received through the on-line application process. Each on-line application is delegated to one of the following categories.

Counsel & Advice

Application Received

Applicant contacted

If Applicant cannot be reached in 1-3 days, Director is consulted

Intake completed

File sent to staff attorney

Direct Referrals

Application Received

Applicant contacted

If Applicant cannot be reached in 1-3 days, Director is consulted
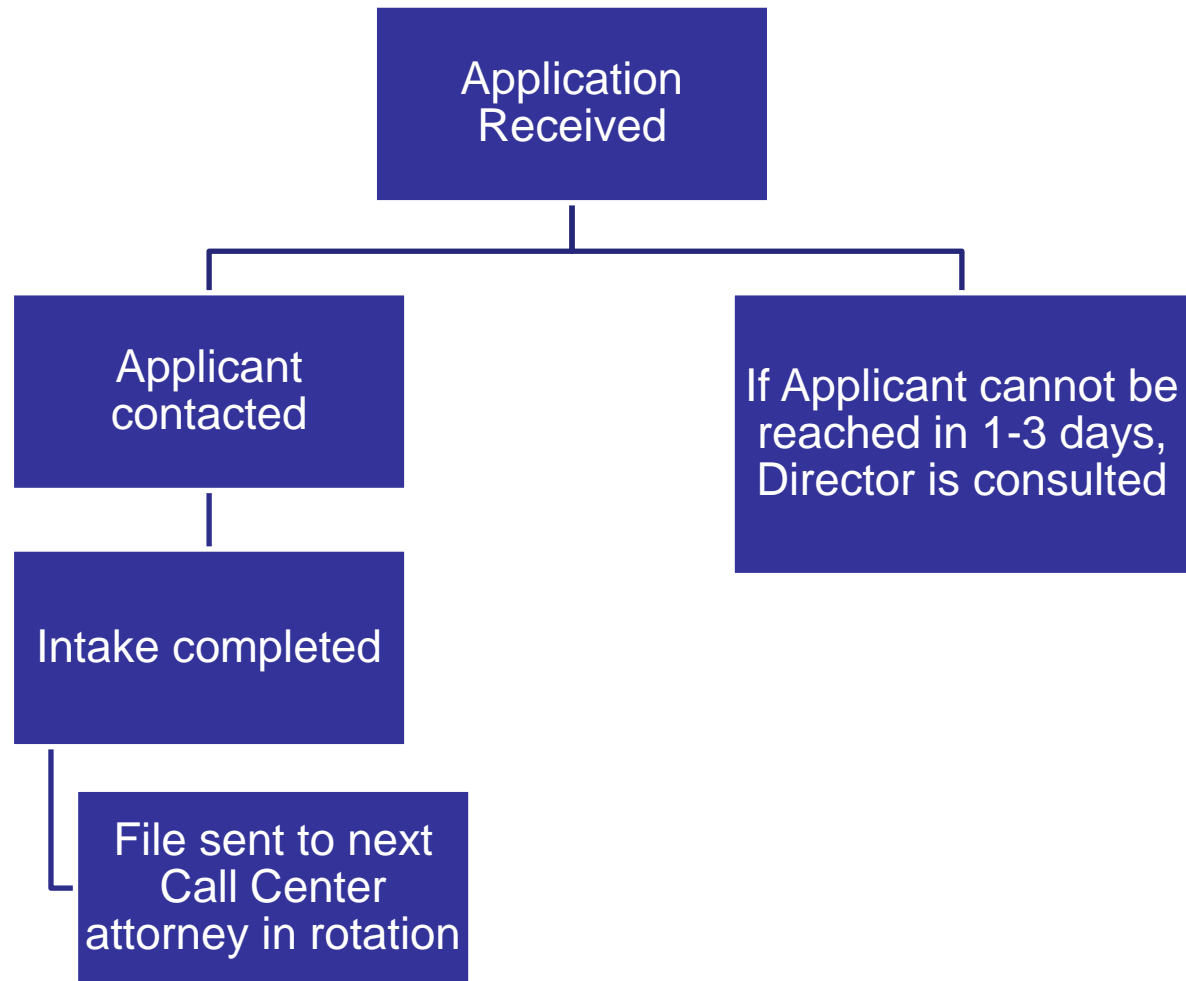
Intake completed

File sent Applicants local office

VLP Referrals

Impact on Intake Overall

- From 9/11-8/12, LSA had 13,962 total accepted cases
  - 53% field office walk-ins
  - 28% telephone hotline
  - 10% other (partner referrals, out of state referrals, former clients, etc.)
  - 9% online

The 9%

- 1,287 cases accepted
- 72 cases rejected
- 542 cases referred to pro bono partner

Lessons from LSA

- Online intake form must evolve
  - Now on 4th version of form

- So must the technology
  - Moving to HTML form now, away from PDF
  - Integrate with new Legal Server CMS

- Web stats show increase in mobile usage

Still have questions?

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Robert Stroud
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(334) 832-4570, extension 3021*, rstroud@alsp.org

THANK YOU FOR ATTENDING TODAY!

Register for the next LSNTAP webinar:

Mobile Phones
October 3, 2012 at 1 pm ET

More information at www.lsntap.org

Contact Information

Brian Rowe (brianr@nwjustice.org) or via chat on www.lsntap.org

Don't forget to take our feedback survey!