Table of Contents

I. Project Goals ................................................................. 3

II. Major Accomplishments .................................................. 5

III. Factors Affecting Project Accomplishments ..................... 8

IV. Strategies to Address Major Challenges ........................... 9

V. Assessment of System or Approach Developed Through the Project ................................. 11

VI. Major Lessons and Recommendations ............................ 15

   a. Exhibit A. User Survey Results
   b. Exhibit B. Judiciary Survey Results
   c. Exhibit C. Court Personnel Survey Results
   d. Exhibit D. Idaho Legal Aid Staff Survey Results
   e. Exhibit E. ROA Memo to the Idaho Court Clerks
I. Project Goals

Idaho Legal Aid Services (ILAS) and the Idaho Supreme Court began a two-year project in January 2005 to develop 300 civil legal forms, utilizing HotDocs software technology. The forms used in the project were developed and approved for statewide use in Idaho by the Idaho Supreme Court. The resulting automated court forms were made available on both the ILAS and Idaho Supreme Court’s Court Assistance Office (CAO) web sites. The following is a list of our project goals:

1. Increase the quality of service and accessibility to the courts for low income Idahoans in an effective and efficient manner.

2. Complete automation of 300 court forms within two years using HotDocs.

3. Develop Spanish interviews linking to 25 of the HotDocs court forms, including Spanish print instructions.

4. Conduct a statewide promotion of the project, giving presentations to at least 100 community organizations & advocacy groups.

5. Within the first year, reach usage of 25,000 persons; within the second year, reach usage of 50,000 persons.

6. Create an effective system of evaluation.

7. Create effective evaluation tools to gather feedback from users and advocates.

Because this project was essentially the first of its kind, there were several changes and adjustments made to the initial established goals.

1. Our most lofty goal was to automate 300 court forms within the two year period. However, this goal proved to be far too ambitious. There were several factors affecting the goal, for example, the initial learning curve for HotDocs was greater than anticipated and due to timing, our developer was unable to attend a beginners training; the addition of the A2J Author Tool interface added more training time, as well as wait time for the tool to become available for program use; and working with the courts and various committees to develop and finalize the automated forms and interviews required more time than planned for, the forms changed several times during the automation process and the forms finally changed in format from “pdf” to “rtf” because of the frequent changes.

2. We have been unable to determine how many people have actually accessed and filed the forms. There was not enough forward planning put into how we would track the forms through the Idaho court system. In addition, the NPADO server team is still working to establish an effective means of gathering usage statistics for each state.
3. Although we have been able to survey many of the individuals using our forms, our initial user survey was created with some naïveté about what information to collect and how best to collect it. Also, our surveys had to be included in the printed form packets with instructions to be turned into the court clerks, who then were supposed to route the completed surveys back to ILAS. This situation led to the definite conclusion that there is a great need for online surveying capabilities, which we have discussed with the NPADO team and on the Multi-State Developers calls.
II. Major Accomplishments

1. Over the course of the grant, we completed 144 HotDocs templates and authored 21 A2J guided interviews. We also completed 3 Spanish A2J guided interviews linked to 17 of the automated court forms with Spanish instructions. Templates and interviews were created in the following areas—divorce without minor children, finalizing divorce by default or stipulation, adult and minor name change, tenant repairs, tenant answer to eviction, landlord eviction, and all small claims forms. All of the forms used as templates for this project were developed and approved by the Idaho Supreme Court and have been mandated as statewide acceptable forms.

2. As mentioned in the previous section, we are currently unable to track the exact number of completed and filed automated court forms, but we were able to track the total number of web site hits associated with the project. In total the Interactive Court Forms section of our web site received over 23,000 hits from May 2006 through December 2006. Below is a breakdown of the numbers by category and form packet. Please note that the numbers do not necessarily reflect true popularity of the form packets, as each packet was posted the date it was completed.

<table>
<thead>
<tr>
<th>Breakdown by Category</th>
<th>Year-End Hits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Law Forms</td>
<td>9,439</td>
</tr>
<tr>
<td>Landlord Tenant Forms</td>
<td>6,427</td>
</tr>
<tr>
<td>Name Change Forms</td>
<td>2,926</td>
</tr>
<tr>
<td>Small Claims</td>
<td>3,213</td>
</tr>
<tr>
<td>FAQs</td>
<td>1,745</td>
</tr>
<tr>
<td><strong>Total Hits</strong></td>
<td><strong>23,750</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Breakdown by Form Packet</th>
<th>Hits as of This Month</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Family Law</strong></td>
<td></td>
</tr>
<tr>
<td>Divorce Complaint Packet (no children)</td>
<td>5,207</td>
</tr>
<tr>
<td>Finalize Your Divorce by Stipulation (no children)</td>
<td>2,003</td>
</tr>
<tr>
<td>Finalize Your Divorce by Default (no children)</td>
<td>1,102</td>
</tr>
<tr>
<td><strong>Landlord/Tenant</strong></td>
<td></td>
</tr>
<tr>
<td>Landlord Use: 3-day Eviction Notice</td>
<td>2,992</td>
</tr>
<tr>
<td>Landlord Use: 3-day Eviction Complaint</td>
<td>1,166</td>
</tr>
<tr>
<td>Tenants Answer to an Eviction</td>
<td>821</td>
</tr>
<tr>
<td>Tenant Request for Repairs Notice</td>
<td>679</td>
</tr>
<tr>
<td>Tenant Request for Repairs Complaint</td>
<td>339</td>
</tr>
<tr>
<td><strong>Name Change</strong></td>
<td></td>
</tr>
<tr>
<td>Adult Name Change</td>
<td>2,926</td>
</tr>
<tr>
<td>Minor Name Change</td>
<td>921</td>
</tr>
</tbody>
</table>

…continued below…
3. During the course of the project we partnered and built relationships with all of the 44 county Court Assistance Offices. The Court Assistance Officers were able to help us test several of the interviews before our public launch; they have been our biggest source of referrals and have provided us with the greatest number of user feedback surveys. We have participated in four in-person statewide trainings to further help them understand how the interviews work, how to effectively assist users, show new features of the A2J interface and hold open discussions for feedback.

4. The project was launched on May 1, 2006 in connection with Law Day. We were able to use this link to gain a fairly significant amount of publicity for the Interactive Court Forms public launch. Our Lead Judge in the project, Judge Michael Dennard, participated in a news-at-noon special feature Q&A session on our local NBC station to talk about the project; an article about the Interactive Court Forms was featured on the front page of the business section of Idaho’s largest newspaper and the project was featured in several other small newspapers around the state. As a side note, the project was also featured as part of the “Case Study: Access to Justice” article in the November 27, 2006, edition of BusinessWeek. (http://www.businessweek.com/magazine/content/06_48/b4011431.htm?chan=search)

5. The biggest means of advertisement for the project was through a grassroots approach of in-person community presentations to a network of 126 advocacy groups and statewide organizations. This group of organizations has committed to informing our client community of the Interactive Court Forms by displaying marketing materials within their offices, they will refer potential users to the automated forms, some of the organizations have linked to our website, many will provide assistance to users if they have a public access computer, and all have said they will provide any constructive feedback and comments from users.

6. We were able to collect a large number of surveys from users (see Exhibit A), and at the end of our project, we also surveyed a handful of the Magistrate Judges (see Exhibit B), Court Assistance Officers/Clerks (see Exhibit C), ILAS staff (see Exhibit D) and conducted two in-person interviews with our closest partnering advocacy organizations—
the Women and Children’s Alliance and the Nampa Justice Center (see Exhibit E). We also received approximately 60 comments from users via the “send feedback” feature on NPADO.

7. We developed and printed 50,000 brochures, 500 posters and 50,000 bookmarks, many of which were distributed to clients and partnering agencies.
III. Factors Affecting Project Accomplishments

The greatest factor affecting our project was that it was simply too ambitious considering the spearheaded nature of the project. When the initial grant proposal was written no one involved in writing the grant really understood the extent of what it would take in terms of training, development, testing and implementing such a project. Certainly each person had a good understanding of the need for such a project, what we wanted to accomplish and what we hoped the impact would be, but there were few resources and even fewer programs with direct experience and knowledge that we could use to create a realistic plan.

In addition, the forms used in the project were and are the product of a working Idaho Supreme Court Standardized Forms committee. While the forms we intended to use for automation had been completed, it was unclear until we were further into the project that they would be changing often either due to committee improvements or changes in the law. This was an issue because we started the project creating pdf templates and thereafter realized that due to frequent form changes, it made more sense to develop our forms as Word (rtf) templates, which would result in a significant time savings for development and making changes. Unfortunately some of the forms had already been developed at this point and therefore had to be redone, which caused some setback. There was also a slight lag in implementing this change as it had to be cleared and approved by the Supreme Court’s Access to the Courts Committee.

The next factor, which somewhat ties into the previous factor, was the amount of time we allotted for learning HotDocs. Unfortunately we did not adequately anticipate the amount of time necessary to learn HotDocs, especially because our developer was not on staff when an introductory in-person HotDocs training was offered by LSC. The learning curve for this software was vastly higher than anticipated and did require some backtracking when we switched from pdf to rtf templates.

Another curveball was the late implementation of the A2J Author Tool as the interview interface. When our project started in January 2005, the A2J software had not yet been released. Therefore, our initial templates used a HotDocs interviews that later had to be replaced with an A2J interview. Idaho was able to obtain the software somewhat earlier than its official release, but with that came the caveat that we would be using a beta version that would require working through some of the remaining software bugs. This also contributed to slower development.

Last, we have been unable to obtain sufficient statistics regarding actual usage and filed documents, as we are at the mercy of the courts to get this information. Unfortunately, it is not a priority of the courts, but we are working with them to find a way to obtain the information without too much additional strain on their current system.
IV. Strategies to Address Major Challenges

We have determined several challenges of the project, some during the course of the project and some through the evaluation process. Below is a list of the challenges and our strategies for addressing those challenges.

a. **Gathering Adequate Statistics** – As mentioned in the previous section, we have been unable to obtain sufficient statistics regarding usage and the number of documents actually filed with the courts. To address this issue, we are relying heavily on our partnership with the courts and in particular our relationship with Lead Judge Michael Dennard. Judge Dennard has had several meetings with the Administrator of the Courts as well as the court’s ISTARS Coordinator. Internet Status Tracking And Reporting System (ISTARS) is the program used by the courts to manage and track court filings. Currently the system is used very little for gathering statistics; however the capabilities are in place. At this time when a court document is filed, it is entered in ISTARS, notations are made about whether the case is pro se or represented and it is assigned a ROA number. However the ROA number has never distinguished between printed CAO forms, interactive forms, or pro se forms obtained at a form shop, thus making it impossible for us to track the number of interactive forms used in pro se cases. We have been able to negotiate with the courts to have ROA codes created specifically for our interactive court forms and entered by the court clerks, effective May 15, 2007 (see Exhibit E).

b. **Educating Judges & Court Personnel** – One of the greatest realization that came from surveying the judiciary and court personnel about the court forms was that we have not spent enough time educating them and keeping them informed about the project. Because two of our biggest partners and members of our Oversight Committee are the Lead Court Assistance Officer, Frances Thompson, and Judge Michael Dennard, we assumed that our efforts would be best spent doing education and outreach to other advocacy and community organizations because those two partners would likely keep the judiciary and court personnel informed. However, many of the comments in the end-of-year project surveys indicated that this was not the case. Unbeknownst to us, several members of our target audience were just hearing of the project for the first time. Over the next year, we have committed to 25 additional community presentations. We intend to dedicate several of these presentations to court personnel around the state and the judiciary.

c. **Properly Formatted Documents** – We have been aware of this issue from the onset of the project. A large number of users and advocates have reported problems with obtaining improperly formatted documents. As the issue grew, we discovered this was an issue for not only our state, but for all programs using Word (rtf) forms on the NPADO server. The issue is that when users download and print their document in Microsoft’s WordPad, which comes free with every Windows machine, the documents are stripped of their formatting and page breaks, thus causing the forms to run together and print in a jumbled mess. Despite warnings on our website and an entire explanation in the FAQs section of our website, the issue still remains because of the difficulty of getting users to read the instructions before using the program. To address this issue, we plan to continue
our education campaign to all advocates and other agencies that have partnered with us to refer individuals to the forms and/or make them available in their offices. In addition, the NPADO team is working on an enhancement that will allow template providers to set rtf templates to convert to pdf upon assembly and download.

d. **Maintaining the Forms** – Because the majority of our time and efforts have been focused on developing new forms, we now have the issue of keeping up with maintenance of our existing forms. As we learn new and more efficient ways of producing interviews and as enhancements are made to both HotDocs and A2J, there are several things that need to be extended to previous versions of our interviews. We currently have only one developer and due to funding constraints, no intentions of hiring an additional developer. Therefore, we intend to try to recruit interns from our local university to help with maintenance.
V. Assessment of System or Approach Developed Through the Project

The assessment of our project was ascertained from several surveys conducted over a year’s time. The surveys were distributed to client users, magistrate judges, court personnel, Idaho Legal Aid staff and partnering advocacy agencies. While the assessment helped to show us where improvements were needed as outlined in section IV, it also showed that we have a strong level of support from the courts, court personnel and community advocacy groups. In addition, we also believe there has been an increase in the success rate of pro se litigants who have used the project to complete court forms and access Idaho’s courts. Within the next year, we should be able to collect the data needed to confirm this belief with the launch of the new ROA codes referenced in section IV, sub-section a. The following conclusions are based on data from each evaluation. The full survey evaluation results can be found in Exhibits A-D.

a. Client Survey Results

We have received over one hundred client/user surveys since the Interactive Court Forms project was launched in May of 2006. Although we have identified some problems with the surveys (e.g. slightly different versions), the feedback we have received has not only provided valuable information for this fledgling project, but it has also helped provide direction for the future of the project.

Within the survey, several of the questions gave us a feel for our user’s computer competence and comfort level. The large majority (80%) of respondents saw themselves as comfortable or proficient in computer use. Most people (68%) said they use the computer daily, though the second highest number of responses (13%) was down to only once a month.

A series of questions were designed to determine the user’s overall experience with the Interactive Court Forms. One of the biggest lessons taken from this portion of the survey is that we need to know which forms are being accessed by the survey taker. This information would greatly help us determine where to address specific issues and the need for additional help options. While it’s helpful to know where to improve, we were also happy to discover that 87% of participants either found the process pretty easy or very easy and 74% of users believed the process was easy enough they wouldn’t need help using the interviews in the future. In addition, we also found that almost half of the participants did not use the “Learn More” resources because they felt the interviews were already written as simply and understandably as possible and therefore did not require further explanation.

Some examples of comments provided by users include:

- This is GREAT! It takes out all the anxiety of doing it yourself! Thank you SO MUCH!
- Thanks for the forms. This is making a tough situation easier!
- Excellent; what a great and user friendly service.
- Great experience. Thank you.
• Thank you for making this information available. It seems straightforward and hopefully if I need to pursue this further, I will be able to navigate the course without too much difficulty.

b. Judiciary Survey Results
An online survey was sent to all of the magistrate judges in Idaho to determine their satisfaction, observations and opinions of the interactive court forms project (attached).

Of the several different groups of people we surveyed, we learned one of our most important lessons from the judiciary survey. While most of the other groups we surveyed had overwhelmingly positive reactions to the project, there were a number of negative responses from the judiciary. After further review and follow up, we believe the comments came from a couple of different issues—(1) Some of our judges still hold a very strong bias against any kind of pro se action and used the comments section of our survey to vent frustration about pro se litigants in the courts as a whole. (2) While we did a significant amount of outreach, most of our efforts were focused on the public and project partners and advocates; thus, we did not do an adequate job of educating or acquiring buy-in from the judiciary.

We used the survey to get a feel for the number of interactive court forms judges were seeing in their courtrooms. Although we had five responses indicating they had seen between 10 and 20 forms come through and two that had seen 20 to 30, more than half either did not respond or said none. Similarly half of the respondents either did not answer or could not tell the difference between the interactive forms and the printable Court Assistance forms until the distinction was pointed out in our survey (the interactive forms have a watermark). This was another indication that we should have spent more time educating judges on the project.

We also asked about any perceived increase in accuracy, efficiency, and/or effectiveness due to the use of the interactive forms. The majority of the responses were positive. For example, of the responses received when asked if pro se litigants were generally more prepared about what to expect in the courtroom and representing themselves, 8 out of 9 judges felt litigants were more prepared. In addition, just over more than half of the judges responding also felt pro se litigants generally provide forms that are more accurate and complete when using the interactive court forms.

Although we have some work to do in educating our judges, we strongly believe that the interactive forms will be a benefit to both pro se litigants and the courts and that with thoughtful presentations we can help most of the judiciary to recognize those benefits. Some of the comments given about whether or not the project increases the effectiveness and efficiency of the courts include:

• Yes, very much so. It is rare for the pro se forms to be correctly completed, whereas I have not found any mistakes in the interactive forms for divorces.
• There is great potential for improved efficiency and effectiveness.
• Yes, it has. Those who use the interactive forms are much more likely to have all their paperwork in order so that the case can be completed in one session and with the minimum of assistance from the court.

c. Court Personnel and Idaho Legal Aid Staff Survey Results
Surveys were distributed to all Court Assistance officers (CAO) and Idaho Legal Aid staff (ILAS) around the state (attached). While there were some lessons learned, overwhelmingly, the surveys show positive reactions to the project from both groups.

For the most part, the web sites leading to the automated documents were said to be easy to navigate and helpful. Of the 46 total responses, only 10 found the CAO site difficult to navigate and only 5 found the ILAS site difficult to use. Through our partnership with the CAO officers and the training we have in place for our own staff,remedying these difficulties should be fairly simple. We also believe there will likely always be some user’s who will need assistance, but with well trained advocates, this shouldn’t be a barrier for use.

Some of the other comments surrounding issues users were having included printing errors or issues resulting from the user downloading documents in the wrong word processor. All printing errors have been discussed with the NPADO team and we have implemented an education and training plan to help ensure users understand which word processing programs can be used to download documents. Both groups also reported problems with submitting and assembling documents. This is another function of the NPADO server, which we’ve worked through with the NPADO team.

When asked about how the project overall helped with efficiency and effectiveness in assisting pro se litigants with their court related matters, the comments received include:

• Vastly helps! This is far superior to the fill in the blank manual forms. First rate product, clean and foolproof!
• I believe this is an essential tool to the CAO program. Usually upon an initial visit if you explain the reasons for registering, saving, and property issues if it's a divorce, the parties are readily able to complete the process with little added assistance.
• I think it has greatly improved pro se litigants understanding of how to proceed and what forms should look like.
• I think it has greatly increased access to the courts for pro se litigants and has freed up legal aid attorney time to work on cases that are impractical for clients to do pro se.

d. Partnering Advocacy Group Interview Results
One-on-one interviews were conducted with two of our biggest project partners, the Nampa Justice Center and the Women’s and Children’s Alliance (WCA). These interviews helped us to gauge the experience of our partners as they assist clients in the use of the online interactive forms.
Both the Justice Center and the WCA work with victims of domestic violence and primarily used the divorce complaint forms as well as finalizing the divorce by stipulation or default. Following are some of the findings from the evaluations:

- The Justice Center only used the CAO website rather than the ILAS website to access forms.
- Neither experienced problems navigating either website
- In both cases, clients were told what they would need to prepare for the interviews by advocates.
- The Justice Center has been advising clients not to sign up for a username and password.
- The WCA observed about 50% of users signing up for a user name and password
- Since the advocates at both agencies assist the clients to start and throughout the interviews, they both reported no problems accessing or using the forms.
- “Learn More” bubbles were used and found helpful.
- Both agencies go through the instructions that print out with the forms with the clients to make sure that no questions remain when the client files their forms.

Overall our partners rated the project very highly. When asked if the interactive court forms project has helped improve efficiency and effectiveness in both the courts and for pro se litigants, both partners gave us an enthusiastic “yes.” Some of the other comments were:

- It is so much easier!
- Many of the people we work with didn’t understand the process or what they were filling out before.
- Everyone is surprised at how easy the forms are to use.
- It puts all of the right information in the right place.

Most importantly, both agencies are very willing to continue their alliance with Idaho Legal Aid and will support us fully as we move forward with our technology initiatives.
VI. Major Lessons and Recommendations

This project provided us with several lessons learned, which should also serve as recommendations for any other legal services program that may consider taking on such a project. Lessons and recommendations are below:

a. **Do not be Overly Ambitious** – The single greatest lesson learned is that you cannot be overly ambitious on a project that you are pioneering, while still trying to maintain a high level of quality and timely project. While we did not succeed in meeting our initial goal of developing 300 automated court forms, we do feel our reevaluated goal of 144 automated forms has been a great success. Our forms were made available to the public with much emphasis on providing a high quality product with the end user in mind. We did this by offering the following—a multitude of resources and information built in the interview and through printed form packet instructions; by providing significant outreach to various community organizations that would refer individuals to the project; professional and informative marketing materials; an extensive FAQs section on our website; public terminals in every county; statewide accepted forms, etc. It would have been impossible to offer all of these things and complete 300 forms with the time and budget given.

b. **Do Your Homework** – Now that a major project of this type exists, we are happy to make materials available and consult with other organization attempting a similar project. Knowing what to expect and how to plan effectively is half the battle in any project and unfortunately, when there is little information or resources available, it is tough to know even the right questions to ask to get started when developing your plan. For example, pdf or rtf templates; an in-house developer or outsourced; how much time should be allotted for training; how much time should be allotted for development; ideas for developing a marketing plan; web site development; print instruction development; how to gather statistics; usability testing, etc.

c. **Find Advocate(s)/Liaison(s)** – Much of our success in gaining court support, community support, and distribution of the project has been due to our project advocates/liaisons, Judge Michael Dennard, and Lead Court Assistance Officer, Frances Thompson, who have both made this a “pet project”. Both have helped tremendously with getting the project in front of the right people, increasing buy-in, marketing the project and providing support for users.

d. **Line up Project Partners in the Beginning** – Having at least some buy-in from potential project partners will save significant time in the end. We were fortunate that we did not have to overcome the obstacles some states face when trying to get support from their courts. Doing that work ahead of time will help avoid potential problems and roadblocks down the road. We highly recommend setting up meetings with judiciary, local court personnel, potential advocacy groups and community organizations that may help advertise the project. In addition, we suggest using the Idaho project or other smaller projects to help establish buy-in for those partnerships.
Computer Usage

1 How often do you use a computer and/or the internet?

<table>
<thead>
<tr>
<th>Frequency</th>
<th># of Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>76</td>
<td>68%</td>
</tr>
<tr>
<td>Several times a week</td>
<td>12</td>
<td>11%</td>
</tr>
<tr>
<td>Several times a month</td>
<td>9</td>
<td>8%</td>
</tr>
<tr>
<td>Once a month</td>
<td>15</td>
<td>13%</td>
</tr>
</tbody>
</table>

2 What do you usually use the computer and/or internet for?
(check all that apply)

<table>
<thead>
<tr>
<th>Activity</th>
<th># of Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type Documents (word processing)</td>
<td>79</td>
<td>71%</td>
</tr>
<tr>
<td>Play games or Internet shopping</td>
<td>47</td>
<td>42%</td>
</tr>
<tr>
<td>Internet Research or Read news</td>
<td>82</td>
<td>73%</td>
</tr>
<tr>
<td>Email and/or Instant Messaging</td>
<td>91</td>
<td>81%</td>
</tr>
</tbody>
</table>

3 How would you describe your comfort level on a computer and/or internet?

<table>
<thead>
<tr>
<th>Comfort Level</th>
<th># of Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not comfortable, I prefer to have help.</td>
<td>8</td>
<td>7%</td>
</tr>
<tr>
<td>Somewhat comfortable</td>
<td>14</td>
<td>13%</td>
</tr>
<tr>
<td>Comfortable, but not proficient</td>
<td>38</td>
<td>34%</td>
</tr>
<tr>
<td>Proficient on a computer and the Internet</td>
<td>51</td>
<td>46%</td>
</tr>
</tbody>
</table>

Interactive Court Forms Experience

4 Select One

<table>
<thead>
<tr>
<th>Activity</th>
<th># of Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>I signed up for or logged in using a username and password.</td>
<td>56</td>
<td>50%</td>
</tr>
<tr>
<td>I went directly to the form interview without logging in.</td>
<td>51</td>
<td>46%</td>
</tr>
</tbody>
</table>

5 How easy was the process for either logging-in or going directly to the interview?

<table>
<thead>
<tr>
<th>Difficulty Description</th>
<th># of Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very easy, I did not have any problems</td>
<td>60</td>
<td>54%</td>
</tr>
<tr>
<td>Pretty easy</td>
<td>37</td>
<td>33%</td>
</tr>
<tr>
<td>I had some problems, but worked through them.</td>
<td>13</td>
<td>12%</td>
</tr>
<tr>
<td>I had a difficult time.</td>
<td>2</td>
<td>2%</td>
</tr>
</tbody>
</table>

6 Did you ask/call for assistance at anytime during the interview?

<table>
<thead>
<tr>
<th>Assistance Request</th>
<th># of Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>47</td>
<td>42%</td>
</tr>
<tr>
<td>No</td>
<td>64</td>
<td>57%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Problem Description</th>
<th># of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saving the document, assistance on different sections and what to do.</td>
<td></td>
</tr>
<tr>
<td>Everything</td>
<td></td>
</tr>
<tr>
<td>Printing Documents</td>
<td></td>
</tr>
<tr>
<td>Property separation</td>
<td></td>
</tr>
<tr>
<td>Had trouble getting documents, but went to different computer.</td>
<td></td>
</tr>
<tr>
<td>Which forms?</td>
<td></td>
</tr>
<tr>
<td>Property</td>
<td></td>
</tr>
<tr>
<td>Forms printed in wrong format</td>
<td></td>
</tr>
<tr>
<td>Case #</td>
<td></td>
</tr>
<tr>
<td>Spelling and changing to an annulment</td>
<td></td>
</tr>
<tr>
<td>To specify joint debt</td>
<td></td>
</tr>
<tr>
<td>I hit back browser, my error</td>
<td></td>
</tr>
<tr>
<td>Leaving questions blank</td>
<td></td>
</tr>
<tr>
<td>Lost document one, need view pop up screen to show where one is at.</td>
<td></td>
</tr>
<tr>
<td>Legal Advice</td>
<td></td>
</tr>
<tr>
<td>Getting started</td>
<td></td>
</tr>
<tr>
<td>Names of relatives for parents</td>
<td></td>
</tr>
<tr>
<td>Typing information</td>
<td></td>
</tr>
<tr>
<td>Printing Problem</td>
<td></td>
</tr>
<tr>
<td>I couldn’t remember the debt part</td>
<td></td>
</tr>
<tr>
<td>Was not sure what to do at end</td>
<td></td>
</tr>
<tr>
<td>How to do it? Legal Aid</td>
<td></td>
</tr>
<tr>
<td>What to do if I don’t have information for a question</td>
<td></td>
</tr>
<tr>
<td>For the names wasn’t sure how to suffix if female or unknown</td>
<td></td>
</tr>
<tr>
<td>Unclear about “logout” process, didn’t see option</td>
<td></td>
</tr>
</tbody>
</table>

7 Would you need to ask for assistance if you used the Court Form Interviews again?

<table>
<thead>
<tr>
<th>Assistance Request</th>
<th># of Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>27</td>
<td>24%</td>
</tr>
<tr>
<td>No, I feel pretty comfortable now.</td>
<td>83</td>
<td>74%</td>
</tr>
</tbody>
</table>

8 Did you use any of the “Learn More” resource bubbles in the Interview?

<table>
<thead>
<tr>
<th>Assistance Request</th>
<th># of Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>56</td>
<td>50%</td>
</tr>
<tr>
<td>No</td>
<td>52</td>
<td>46%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Helpfulness of Assistance</th>
<th># of Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>46</td>
<td>41%</td>
</tr>
<tr>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
9 Please check any of the statements below that you AGREE with:

<table>
<thead>
<tr>
<th>Statement</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I needed more instruction for logging into the interview</td>
<td>16</td>
<td>14%</td>
</tr>
<tr>
<td>I needed more instruction for answering the questions in the interview.</td>
<td>11</td>
<td>10%</td>
</tr>
<tr>
<td>I needed more instruction for using the &quot;Learn More&quot; resources</td>
<td>4</td>
<td>4%</td>
</tr>
<tr>
<td>I needed more instruction for submitting and getting my forms.</td>
<td>31</td>
<td>28%</td>
</tr>
</tbody>
</table>

10 We really appreciate your feedback, any other suggestions or comments to add? 

Comments:  
Great experience. Thank you 
Very easy 
Thanks for the form. This is making a tough situation easier! 
The women of Rose Advocate were extremely helpful and made me feel safe and comfortable thru this process. 
I just need to work on a computer more 
The process was extremely user friendly. This divorce would have been filed years ago if it had always been this simple. 
I had to amend my complaint, but when I made the changes in the interview it did not change my forms. 
Excellent; what a great and user friendly service. 
Everything went well. 
Debts had "bulleted" text on complaint, but not on decree. Need bigger text boxes for debts so they don't take so much room. 
Thank you for making this information available. It seems straight forward and hopefully if I need to pursue this further, I will be able to navigate the course without too much difficulty. 
Should only show submit button once, easy to click it on second screen. Cannot tab to login and press enter, must click on it or it sends you to a strange screen. 
Using work computer w/Word, did not format correctly, had to get help fixing forms. Did not print off right, had to have office of court fix and print. 
For the divorce w/o children, I don't recall a name change option. My employers name was altered from all-caps to camelcase, but shouldn't have been. My document was not emailed or downloadable on first attempt. Some instructions from "Instructions #1 Complaint for divorce w/o children were vague or not applicable. 
When I went back to finalize, the system did not retain my husband's property. I had to re-enter it. Footers on exhibits were wrong. 
 Couldn't open in WordPerfect 
It was great, thanks! Forms didn't print right. 
Great Service 
When "loggin in"after username setup, does not take you to interview, only takes you to page to change personal settings. 
Answers saved-had to log out then in to have answers available. Couldn't skip forward and had to review everything to get where I needed to make corrections. 
Thanks, this was a lot of help for me. 
Need instruction that to access each saved doc it will be done sep. Be nice if you could access a list. 
Went back through to correct. It didn't make the changes. 
Is not completely user friendly. 
Everything went well. 
Get more info on anullments, this is so easy. 
The system was very user friendly, but make sure they know they definitely need to join to be able to save anything. 
Nope, everything was great! 
Very easy to use and understand 
Great Service! Thank you! 
Process was very intuitive. 
Having online legal forms available has been a very valuable resource for me. 
Great site. Thanks for the great tool for us. 
I really appreciate having the site and being able to use it. 
Property all run together used pen to separate with commas 
Suggest every user sign up before starting to ensure that work won't be lost. 
I couldn't find out how to get my interview up again, I just re-did it a bunch of times. 
Nice having the questions print onto court documents. 
People were very helpful. 
I used a court advocate to fill in my answers and access program. 
Thank you 
The website is hard to find, it needs a better link. 
Great, help box a little small and out of line of sight. Very simple though. 
Very easy 
The forms site itself is fantastic. Getting there is a rather convoluted process from the Interactive forms. 
This was a great idea. Saved me lots of time. 
Works just fine. 
It was difficult to know how to print the info out at the end. 
It was pretty easy for me to navigate. 
It only gives birthplace in immediate US, none are for foreign or base or out of state. 
Great program 
This was very easy to use. 
Very helpful 
I used the landlord/tenant forms. They were very user friendly and should help people who have to represent themselves. I am not sure what type of delay there is for a dial-up connection.
Exhibit A

Overall it was a fairly smooth procedure. I became stuck in a few places mainly because of my lack of computer experience.
Great program! Too bad you (and the rest of the world) don't use McIntosh.
Very good
Great Job - easy

This is GREAT! It takes out all the anxiety of doing it yourself! Thank you SO MUCH!
Exhibit B

Judiciary Survey Results

::: 28 Responses :::

1. What judicial district are you in?
   - First: 2
   - Second: 3
   - Third: 4
   - Fourth: 4
   - Fifth: 4
   - Sixth: 2
   - Seventh: 6

2. Please give us your best estimate regarding the number of interactive court forms you've seen in your court room over the last year.
   - None: 3
   - 5 or less: 4
   - Between 5 and 10: 2
   - Between 10 and 20: 5
   - Between 20 and 30: 2
   - More than 30: 9

3. Are you seeing a rise in the number of interactive court forms filed in your court?
   - Yes, slowly increasing: 7
   - Yes, growing rapidly: 4
   - Seen few, don't seem to be increasing: 2
   - No, seen very few or none at all: 8
   - No Answer: 3

4. Is it easy enough for you to distinguish between the online interactive court forms and the printable CAO forms.
   - Yes, easy to distinguish: 13
   - No, difficult to distinguish: 2
   - No Answer: 10

5. Do you find that pro se litigants who have used the online interactive forms are generally more prepared, both in their paperwork and what to expect in the court room?
   - Yes, usually have all forms/are complete: 5
   - No difference. Don't have forms/complete: 8
   - Yes more informed what to expect/rep self: 8
   - Not any more prepared after using IFs: 1

Comments:
1. Answered "c" with comment "However, they eat up lots and lots and lots of Clerk time."
2. I was unaware which were which until now.
3. I've not seen the interactive forms to have an opinion.
4. I haven't seen any of the interactive forms.
5. I haven't thought to compare the two types.

6. Have you seen any attempts by individuals to modify or change the forms beyond their intended purpose?
   a. Yes 4
   b. No 12
   aa. No Answer 9

7. Please tell us whether or not you think the interactive court forms project has helped improve efficiency from the judiciary perspective.

Comment from Judicial District:

- 6th Yes, it has. Those who use the interactive forms are much more likely to have all their paperwork in order so that the case can be completed in one session and with the minimum of assistance from the court.
- 2nd Definitely. The forms are more appropriately being completed.
- 3rd I would be interested to see if the availability of the forms has increased the number of pro se litigants.
- 5th No efficiency improvement noted here. The pro se forms in general require substantially more time to review when the case comes up than pleadings from a licensed attorney.
- 3rd I think the forms are much better then what the legal form stores were offering. I don't like the joint filing of the documents. Stipulated decree of divorces or stipulated order on Motion to Modify are fine, but ISTARS requires a Plaintiff and Defendant, not a joint petition. Stop the joint petition/complaints.
- 3rd Unable to tell.
- 5th No opinion.
- 5th I think it has improved efficiency.
- 2nd The forms have not improved judicial efficiency, in fact they take more time to deal with than pre CAO filings; UNLESS we are expected to rubber stamp the efforts of the pro se litigant.
- 1st Yes.
- 7th I think it will help, but perhaps just hasn't caught on here yet, or perhaps I just am not seeing them yet.
- 7th Since I don't believe I have seen the use of any of the interactive forms, I have no opinion on this question.
- 1st I have had very little exposure to the interactive forms. I think they will help when used more in this county.
- 7th The forms are well done, and if the parties are competent enough to follow directions, they help with efficiency.
- 7th The instructions and form are very good but many persons will still need the help of the court assistance coordinator to complete the forms.
- 6th Yes I think this is an improvement from pro-se litigants trying to create their own forms.
- 4th I believe it helps based upon my limited (7month) experience on the bench.
- 4th Yes, people come through the process better prepared.
- 5th Any practice that can help the pro se party are helpful.
- 7th I still believe it is too early to tell.
- 4th I think the concept is great. I guess we just need to get the word out more that they are available.
- 2nd I think pro se litigants are very difficult to deal with. For the most part
8. Please tell us whether or not you think the interactive court forms project has helped improve efficiency and effectiveness for pro se litigants and court staff.

Comments from Judicial District:

4th  Yes it has.

6th  From what I have heard from others they have been helpful.

2nd  Yes, very much so. It is rare for the pro se forms to be correctly completed whereas I have not found any mistakes in the interactive forms for divorces.

3rd  No. Each county needs a separate designated place. In my county the people sit in the Clerk's office disrupting Clerk work while filling out interactive forms. Funding should be considered to set up work stations in rural counties.

5th  Not able to speculate regarding pro se litigants, nor have court staff offered comments.

3rd  It don't see a change. The problem is that most pro se litigants just can't follow directions. I do the best I can from the bench to get the forms finalized for the pro se people.

3rd  Cannot say.

5th  It appears that they would, but I haven't noticed the forms being used in this jurisdiction.

5th  Pro-se litigants are less likely to change the forms. I can't speak to any change in court staff. I haven't observed anything one way or another.

2nd  The forms have no doubt provided low/no cost access to the Courts for pro se litigants. The quality of the product is low; i.e. I have signed CAO forms which I would never accept from an attorney.

1st  Yes.

7th  I think they will, given time to catch on.

7th  No opinion -- for the same reason expressed in response to #7 above.

1st  Again, I have had little use of the interactive forms in this county. The forms will likely improve efficiency when used more frequently.

7th  Yes, the project helps.

7th  There is great potential for improved efficiency and effectiveness.

6th  Yes I think it has.

4th  Yes. Efficiency and effectiveness is improved. Staff can direct pro se litigants to the website while on the telephone and can walk them through the forms. This happens on a regular basis.

4th  Generally, yes.

5th  Not enough use at this point to make substantive ranking.

7th  I believe there has been a minimal improvement.

2nd  I really don't see a big difference but in all fairness I really have not paid a huge amount of attention to the difference in the forms.

4th  The interactive small claims forms are great. I've played around with them a little pretending to be a litigant. I didn't know to look for the special watermark. So I can't really answer your survey honestly. I will keep an eye out for them in the future. Thanks.


## Court Assistance Personnel Survey Results

::: 20 Responses :::

### 1. Please describe yourself:
- a. Court Assistance Officer 12
- b. Court Clerk 8

### 2. What interactive form packet(s) have you helped people use?
- a. Divorce Complaint (no minor children) 13
- b. Finalize Divorce by Stip/Default 8
- c. Adult Name Change 12
- d. Minor Name Change 10
- e. Landlord Eviction Notice or Complaint 10
- f. Tenant Repairs Notice or Complaint 1
- g. Tenant Answer to an Eviction 1
- h. Small Claims - Filing 4
- i. Small Claims - Other 3

### 3. In general, do users report issues or often request help for getting to the interactive form packets from either the CAO or ILAS website?
- a. No, both sites were easy to navigate. 11
- b. Users find the CAO site difficult to navigate. 6
- c. Users find the ILAS site difficult to navigate. 1

### 3a. (Conditional Question) Please describe any issues or comments users have expressed about difficulties navigating the website(s).

**Comments:**

1. The formatting issue which was answered today.
2. Difficulty in printing documents - formatting, etc.
3. CAO website is hard to understand and get through to the instructions and forms. The "packets" need to be centrally located in one general area.
4. Would be nicer if they were in packets and also if instructions were with paperwork that that instruction pertains to.
5. For some reason they have difficulty distinguishing between interactive forms and printable forms. They intend to go into interactive forms then are confused when they accidentally select printable forms. They seem to be disappointed that they could not access the information they were looking for.
6. We are a small County. The patrons just seem to want the form to hand write. They do not like to go online to obtain or complete. Some do not have a computer and even though we have one in our small library for them to use they want you to help them. As for the Interactive forms I have not had any that even want to go there.
4. Have users indicated there should be more information to help them prepare for the interview?

Comments: 1. No
2. No
3. Users generally do not have the information necessary to complete the FCLIS on their initial contact. SSN's dob's etc. They usually have to make a second trip with that info when using the public PC.
4. More information printing out the forms. also some kind of list of what they need to bring because if it doesn't print out for whatever reason they don't know about it.
5. User indicated confusion in navigating through the website when activating the interactive forms feature. Other users had difficulty printing out, or with the finished formatting, of the documents.
7. Better description of what kinds of issues are "property" issues. i.e. retirement accounts and other real property warnings. In other words, definitions within the interviews.
8. They seem to access the interactive forms okay. They seem to be forgetting to save their project and forget to print all the needed forms. One lady brought in the name change documents but when she printed the forms, the petition did not print. She assumed she was ready to file because it printed her documents.
9. I believe the patrons (in our County) want a person to help them even with the Interactive forms.
10. No

5. Based on your experience, please indicate what percentage of users you think are accessing the interactive forms in each way. Use 0-100% scale for each.

<table>
<thead>
<tr>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. They sign up for a user-name and password during the first visit to the site. 49.38%</td>
</tr>
<tr>
<td>b. They sign up for a user-name and password after the first visit. 35.71%</td>
</tr>
<tr>
<td>c. They go directly to the form without a user-name and password. 44.50%</td>
</tr>
</tbody>
</table>

6. Based on what users are telling you, please select all of the following you feel are true.

<p>| |</p>
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Most users report NO problems accessing or using the interactive forms. 7</td>
</tr>
<tr>
<td>b. Many users ask for help signing in or accessing the interviews on NPADO. 4</td>
</tr>
<tr>
<td>c. Many users use the &quot;Learn More&quot; resources and find them helpful. 3</td>
</tr>
<tr>
<td>d. Many users have trouble using the &quot;Learn More&quot; resources or wish they had additional information. 2</td>
</tr>
</tbody>
</table>
e. Many users report problems with "submitting" their answers and/or printing the forms.

7. Based on your experience, by percentage, how many users experience the following problems:

<table>
<thead>
<tr>
<th>Problem</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Est. percent of users that do NOT have Word and must come in to print docs.</td>
<td>58.30%</td>
</tr>
<tr>
<td>b. Est. percent of users that do NOT realize they need to print the documents and file them with the court. They assume the docs are filed electronically.</td>
<td>19.80%</td>
</tr>
</tbody>
</table>

8. When users have completed an interview, please give your best estimate of the percentage that do the following:

<table>
<thead>
<tr>
<th>Action</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Users that just print the documents.</td>
<td>75%</td>
</tr>
<tr>
<td>b. Users who print docs &amp; save their answers.</td>
<td>50.5%</td>
</tr>
<tr>
<td>c. Users that email their documents.</td>
<td>6.5%</td>
</tr>
</tbody>
</table>

9. Do you find that users generally complete and turn in the "user survey" after printing their documents?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>12</td>
<td>8</td>
</tr>
</tbody>
</table>

10. Do you find that most people who use the interactive forms have read the instructions provided?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4</td>
<td>13</td>
</tr>
</tbody>
</table>

11. Please describe any other frequent issues pertaining to the interactive forms that have been brought to your attention, not previously discussed in this survey.

**Comments:**
1. No person to talk to when CAOs aren't available.
2. None have been reported from our users.
3. I have encountered only 1 person who stated they could not get the system to work for them. However I don't know what the issue was.
4. When filling out divorce-no kids, real property owned in another state caused the program to tell them they could not continue with the forms interview. We've had this problem in 2 cases.
5. Individuals usually do this on their home computer rather than at our courthouse, so we don't get a lot of feedback on these forms. I'm guessing not a lot of people are using them because most of our pro se filing are handwritten rather than typed responses.
6. Mostly being able to print the document after preparation, but I encourage the patron to prepare the document at home and
Comments continued:

7. Everyone seems pretty happy about them and are finding them easy to use - with the exception of some printing problems.
8. Users would like additional forms available.
9. They think it is too hard or confusing so they don't follow all the directions. They end up with incomplete documents.
10. Not being able to go back to their saved answers and pull up the document to fix errors and reprint without having to go clear through the question process again.
11. Just the ability to print the forms properly. Many do not know that each document submitted to the court needs to be printed on a separate page, and the documents run onto the bottom of the previous page, which now I know is being caused by WordPad vs. Word. However users still don't read the instructions to know they can't use WordPad to download the documents.
12. Errors when making changes to property and/or debt division in divorce forms. The changes will reflect in the "new" category, however, the old information is still present. Sometimes there is a long line before the number where it is not needed.
13. The overall is a good response. The public that have used them seem to appreciate them. I have the most difficulty with persons who are less educated. They seem to have the most problems/mistakes.
14. For the most part, it really works well if they have the right setup. However, most often I find users do not have the printing capability, so when they bring in forms, they do not know how they are supposed to print and don't realize the formatting is wrong (Word vs. Wordpad). They all swear that they have the right software, but obviously they don't. They do not have trouble going through it the second time, but they have now wasted so much time. Also in the divorce docs, when a Plaintiff is a man and both parties want the name change it will not give it to them in the complaint. So we have to do the stipulation for the Decree to change the Defendant's name.

12. Please tell us whether or not you think the interactive court forms project has helped improve efficiency and effectiveness in both the courts and for pro se litigants.

Comments:

1. We have not had the opportunity to use the interactive court forms yet, but hope to do so soon in the future because I think it would be great.
2. It has helped improve efficiency for the pro se litigants.
3. Our county has just learned that these forms are available at this conference today. Thank you thank you thank you! They will be utilized from now on.
4. Our county is just now hearing about this, but can't wait to get started in providing this help to the public.
5. I think it is a great tool for pro-se litigants. However, I have
not received feedback because I think the litigants would rather not have to do anything on their own, even with the resources. I think they believe it is too much of a hassle to utilize this tool compared to just buying the form packets.

Comments continued:

6. I like that it gives the public another option--they can fill out the forms by hand or let the computer fill them out. Having options makes it more effective for the consumer.
7. The interactive forms would be really beneficial if our court assistance facility were equipped to have people make use of the on-site computer to complete these but that is not feasible.
8. Vastly! This is far superior to the fill in the blank manual forms. First rate product, clean and foolproof!
9. Yes definitely better.
10. In general, the interactive forms are useful and helpful for patrons who have internet access, or are comfortable using a computer. Some patrons either do not have access to a computer, or do not feel comfortable using the service.
11. YES!
12. The judges love this program and those self litigants who are computer savvy do too. Some people do struggle who are not used to using computers.
13. I think these forms have been a tremendous help to people. The take the process and make it much simpler to complete on there own. Also it gives them added privacy for those people who may need extra help, but don't like people knowing their business.
14. I believe this is an essential tool to the CAO program. Usually upon an initial visit if you explain the reasons for registering, saving, and property issues if it's a divorce, the parties are readily able to complete the process with little added assistance.
15. Yes the interactive forms help improve efficiency.
16. Yes when it prints out correctly, but not when users have trouble. Do keep up the good work, thank you!
17. I believe they are a great tool but I seem to have problems with some patrons wanting to use them. They do not understand the software requirements.
Idaho Legal Aid Staff Survey Results

1. What interactive form packet(s) have you helped people use?
   a. Divorce Complaint (no minor children) 20
   b. Finalize Divorce by Stip/Default 11
   c. Adult Name Change 9
   d. Minor Name Change 7
   e. Landlord Eviction Notice or Complaint 2
   f. Tenant Repairs Notice or Complaint 10
   g. Tenant Answer to an Eviction 3
   h. Small Claims - Filing 8
   i. Small Claims - Other 14

2. In general, do users report issues or often request help for getting to the interactive form packets from either the CAO or ILAS website?
   a. No, both sites were easy to navigate. 20
   b. Users find the CAO site difficult to navigate. 4
   c. Users find the ILAS site difficult to navigate. 4

3. Have users indicated there should be more information to help them prepare for the interview?

   Comments: 1. Sometimes I get calls where people are utilizing the court forms on the CAO website and they don't want to do the interactive format but can't easily find the forms to print.
   2. A couple of clients were diminished capacity and needed help. I don't think any addition to the forms would have made a difference.
   3. I hear input from attorneys and social service providers who have used. They generally want a greater variety of forms/content.
   4. Several users have commented that they have difficulty saving files -printed documents often run lists of property, debts together w/o punctuation, making difficult to follow. I think we now know the problem is Wordpad instead of Word, but it's still an issue.
   5. People are often confused by the CAO website/paperwork because they claim that it is confusing to them which papers they need. Also they claim instructions are confusing to them. It would be helpful to have a description of the form and what it is used for.
   6. If low income there should be a place to bring up the waivers. Waivers can also be admitted to the court house in a small claims case.
   7. No. People have asked if we had other types of forms.
   8. No one seemed to have a problem using the forms or understanding instructions.
   9. Users need better END instructions, better definitions of terms used in the interview, and fill in the blank would help.
Comments continued:

10. Users could not save documents/answers or could not follow instructions to do it, too confusing. Also, users printed complaints had property and debt lists run together w/o punctuation or separation, making them difficult to understand when read, Word/WordPad issue.

11. Concern was expressed about being able to print the documents and also save them. Some found getting to the forms awkward if they were not familiar with computers (using a library) and had to call for assistance. Users are also interested in accessing forms for divorce with children if both parties agree on everything, i.e., custody, debts, property, etc. and want to be able to complete the forms on line.

4. Based on your experience, please indicate what percentage of users you think are accessing the interactive forms in each way. Use 0-100% scale for each.

| Average |   
|---------|---
| a. They sign up for a user-name and password during the first visit to the site. | 61.36% |
| b. They sign up for a user-name and password after the first visit. | 37.85% |
| c. They go directly to the form without a user-name and password. | 42.70% |

5. Based on what users are telling you, please select all of the following you feel are true.

|   |   
|---|---
| a. Most users report NO problems accessing or using the interactive forms. | 19 |
| b. Many users ask for help signing in or accessing the interviews on NPADO. | 6 |
| c. Many users use the "Learn More" resources and find them helpful. | 1 |
| d. Many users have trouble using the "Learn More" resources or wish they had additional information. | 5 |
| e. Many users report problems w/ "submitting" their answers and/or printing the forms. | 6 |

6. Based on your experience, by percentage, how many users experience the following problems:

| Average |   
|---------|---
| a. Est. percent of users that do NOT have Word and must come in to print docs. | 50.05% |
| b. Est. percent of users that do NOT realize they need to print the documents and file them with the court. They assume the docs are filed electronically. | 12.50% |
7. When users have completed an interview, please give your best estimate of the percentage that do the following:

<table>
<thead>
<tr>
<th></th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Users that just print the documents.</td>
<td>92%</td>
</tr>
<tr>
<td>b. Users who print docs &amp; save their answers.</td>
<td>10%</td>
</tr>
<tr>
<td>c. Users that email their documents.</td>
<td>38%</td>
</tr>
</tbody>
</table>

8. Do you find that users generally complete and turn in the “user survey” after printing their documents?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>11</td>
</tr>
<tr>
<td>No</td>
<td>1</td>
</tr>
</tbody>
</table>

9. Do you find that most people who use the interactive forms have read the instructions provided?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>11</td>
</tr>
<tr>
<td>No</td>
<td>4</td>
</tr>
</tbody>
</table>

10. Please describe any other frequent issues pertaining to the interactive forms that have been brought to your attention, not previously discussed in this survey.

Comments:

1. The user does not have word and does not want to save their document to go to a computer that does have that capability.

2. The no kids divorce stuff is perfect for some clients who are poor and have little property. A large percentage of those have cognitive challenges and need help. Usually their caseworker can help them but we've helped a few.

3. If we could just get people to read their instructions over carefully it would fix most of problems that I have heard about. We often have to walk people through the instructions.

4. Biggest difficulty is that many seniors are uncomfortable with computer use or have limited access to computers and still prefer paper forms. I think that will change as we give more community presentations on how easy the process is.

5. Persons who come into or call the office need assistance filling out the forms because they have legal or technical assistance issues.

6. Most just want more topic areas on an interactive form.

7. Users often at a loss on what to do when adverse party files a response to a divorce.

8. Users have occasionally expressed some uneasiness about the accuracy of their responses.

9. One problem, that may not be able to be addressed, is in the repair complaint form - most renters have no idea if their landlord is in the military, and call to ask how to find out that information. Of course, if going through a rental agency that isn't a problem, but a private individual could be in the reserves and the renter has no idea how to access such information.
11. Please tell us whether or not you think the interactive court forms project has helped improve efficiency and effectiveness in both the courts and for pro se litigants.

Comments:

1. It's very helpful.
2. It's a good start...
3. The project improves the efficiency of the court proceedings tremendously.
4. Yes, the forms are much simpler than the paper forms.
5. Yes. This is demonstrated by rising use amongst Idaho litigants. Helps make up for lack of attorneys resources.
6. Has helped; litigants often confused, however, about steps to take if adverse party files a response and the case becomes contested.
7. I definitely think that it has and appreciate this project as a viable option. Literacy can be a problem for some, although I am sure it would be no matter what format pro se litigants used.
8. Yes - it is a great benefit.
9. I think they are great and have helped a lot of people.
10. Yes, I do. When we tell people about our website and the interactive court forms, they are so happy that they are there.
11. I think it has greatly increased access to the courts for pro se litigants and has freed up legal aid attorney time to work on cases that are impractical for clients to do pro se.
12. I think it has greatly improved pro se litigants understanding of how to proceed and what forms should look like.
13. No because they are still referred either to the cao or a private attorney to look over the documents prior to filing them. Wasn't that the whole reason they wanted to do it on their own was because they couldn't afford to have an attorney do it?
14. It has helped improved both efficiency and effectiveness tremendously.
15. Yes, it has helped tremendously! I think the court system appreciates the accurate complete forms. Most people we speak to about this love the forms and feel it is a wonderful program and very user friendly.
16. Judges I have talked with have reported they find the process helpful.
17. Somewhat, clients still prefer human contact to assure them that what they have submitted is correct.
18. I believe the interactive court forms project has helped tremendously for both the courts and the pro se litigants. As more interactive forms are added to help assist pro se litigants the more individuals will use the site to assist them with their legal problems.
MEMORANDUM

To: ISTARS Court Lead Workers
From: Julie A Cottrell
Re: Pilot Project- ROA Tracking of Interactive Forms
Date: 4/10/07

Attached you will see a list of new ROA codes and accompanying text which will need to be added to each of your ISTARS data bases as quickly as possible. By the 15th of May at the latest.

The purpose of these new codes is two fold:

1st - So that the Court can provide necessary reporting to assist the Legal Aid Project with a requirement to provide just how many of these forms (by type) are being filed in the courts.

2nd - To participate in a statewide pilot program, testing a new way to define “standardization for ROA documentation”, which would provide the data entry clerks with any required ROA codes on the face of the documents when the documents are filed. I think this is an exciting concept, and if it proves successful here, may be more widely developed to help in standardization of ROA documentation statewide. (Remember with the Repository we are now all trying to read and understand the ROA’s from all Idaho Courts.)

You will recognize and insert the codes when you see them on the filed documents with the identifier as displayed below highlighted in yellow:
SAMPLE:
FIFTH JUDICIAL DISTRICT COURT, STATE OF IDAHO
IN AND FOR THE COUNTY OF TWIN FALLS
MAGISTRATE DIVISION

XXXXXX
Plaintiff,  )

Vs.  )

XXXXX  )
Defendant  )

Case No. _____________

ISTARS ROA CODE: CAI1

Compliant for Divorce (no minor children)  

CAO D 1-6

The instructions below are provided to assist you in adding the various codes.

The total codes to be added will be 16 for this first phase. (Remember that you can copy and paste the Codes and the text from this word document into ISTARS if you wish.) Please make these additions as soon as possible. The project is underway and they need to begin using these codes and forms very quickly.

If you have any questions at all please do not hesitate to call my office.

Sample Setup for all of these ROA’s will be as you see below for the 1st code:

CAI1 = Court Assistance Interactive form 1

The text will be – Complaint for Divorce (no minor children) CAO D 1-6
The ROA codes to be added are as follows:

<table>
<thead>
<tr>
<th>ROA code</th>
<th>ROA Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAI1</td>
<td>Compliant for Divorce (no minor children) CAO D 1-6</td>
</tr>
<tr>
<td>CAI2</td>
<td>Decree of Divorce (no minor children) CAO D 8-3</td>
</tr>
<tr>
<td>CAI3</td>
<td>Stipulation for Decree CAO D 6-8</td>
</tr>
<tr>
<td>CAI4</td>
<td>Motion and Affidavit for Entry of Default CAO Cv 7-1</td>
</tr>
<tr>
<td>CAI5</td>
<td>Sworn Petition for Protection Order DAO DV 1-1</td>
</tr>
<tr>
<td>CAI6</td>
<td>Complaint for Specific Performance and Expedited Trial CAO TR 1-1</td>
</tr>
<tr>
<td>CAI7</td>
<td>Order on Complaint for Specific Performance CAO TR 8-1</td>
</tr>
<tr>
<td>CAI8</td>
<td>Complaint for Eviction (Expedited Proceedings) CAO UD 1-1</td>
</tr>
<tr>
<td>CAI9</td>
<td>Judgment and Order of Eviction CAO UD 8-1</td>
</tr>
<tr>
<td>CAI10</td>
<td>Answer to Complaint for Eviction (Expedited Proceeding) CAO UD 3-1</td>
</tr>
<tr>
<td>CAI11</td>
<td>Petition to Change Name (Adult) CAO NCA 1-1</td>
</tr>
<tr>
<td>CAI12</td>
<td>Order for Change of Name (Adult) CAO NCA 8-1</td>
</tr>
<tr>
<td>CAI13</td>
<td>Petition to Change Minor’s Name CAO NCM 1-1</td>
</tr>
<tr>
<td>CAI14</td>
<td>Order for Change of Minor’s Name CAO NCM 8-1</td>
</tr>
<tr>
<td>CAI15</td>
<td>Small Claims Form CAO SC 1-2</td>
</tr>
<tr>
<td>CAI16</td>
<td>Answer CAO SC 3-1</td>
</tr>
</tbody>
</table>

Thank you for your assistance in this project.

If I am sending this to multiple people in your county (per your request) please work out the details of who will add these at the “local level”.

Thanks Much!

Julie Cottrell