



# INTERVIEW DESIGN NUTS & BOLTS

April 11, 2022



# Topics

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- Introductions
- Purpose of Presentation
- Designing an Online Interview
  - Types of interview
  - Approaches to design
- Interview Authoring Tools
- Q & A



# Introductions

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- Chris Schwartz

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## Purpose of this presentation

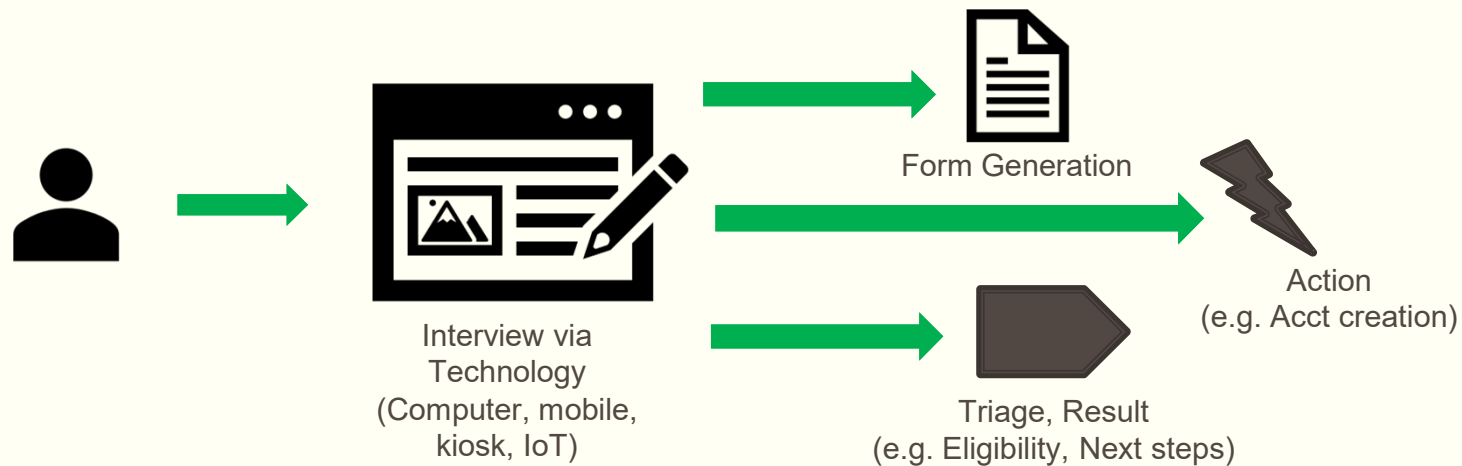
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- Help determine the “necessary” questions for an interview
- Document the key information needed for the Online Interview Author
  - ...with help of a Worksheet
  - <https://docs.google.com/spreadsheets/d/12yWVN1gfO9T8AO-mVVhbbDh0NmMv7OjgVh8clKcsDAg/edit#gid=0>
- NOT to determine the best wording of questions

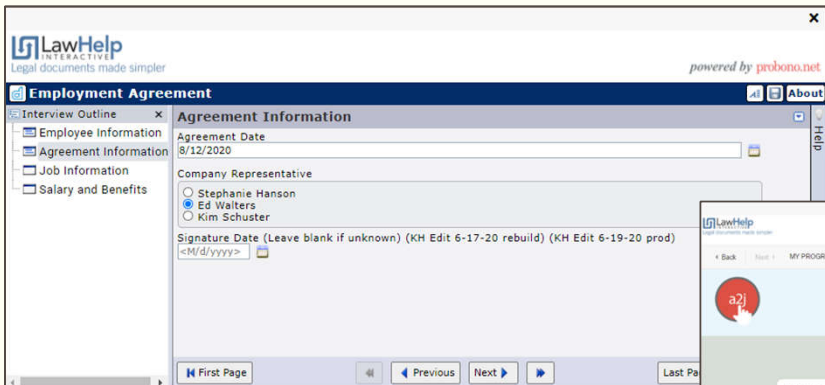
# Types of Online Interviews

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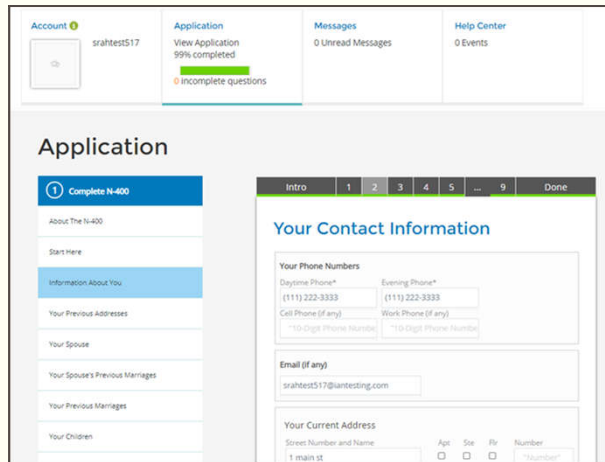
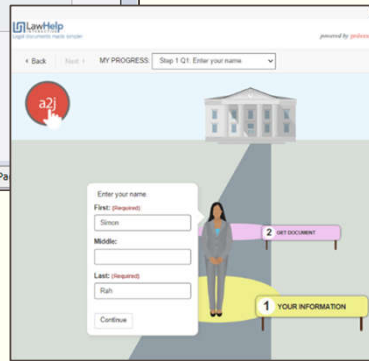
- Document Assembly (LawHelpInteractive.org, Citizenshipworks.org)
- Prescreening/Intake (Citizenshipworks.org, LawHelp Hawaii)
- Triage (IMMI.org, KeepYourBenefits, Legal Risk Detector)
- Chatbot (IMMI.org)

# Examples of Document Assembly & Prescreening



## LawHelpInteractive.org

- DC Courts: Motion to Modify Custody  
<https://lawhelpinteractive.org/Interview/GenerateInterview/6305/engine>
- NYS Courts: Uncontested Divorce  
<https://lawhelpinteractive.org/Interview/GenerateInterview/2427/engine>



## Citizenshipworks.org

<https://www.citizenshipworks.org>

# Examples of Triage

CENTER FOR ELDER LAW & JUSTICE  
ELDER LAW RISK DETECTOR

Start Over

### CLIENT PROFILE

You've elected to do the Standard Risk Assessment.

Please provide the CLIENT'S CONTACT INFORMATION:

First Name:

Last Name:

Age Reported by Client:

Gender:  Female  Male  Non-binary/third gender  Prefer to self describe   
 Prefer not to say

Phone:

I have issues with phone reception, so please try calling me several times a week and leave a voicemail with a callback phone number

**Elder Justice (Risk Detector)**  
<https://probononet.neotalogic.com/a/riskdetectorsny>

Free and simple information for immigrants

WHO IS IMMI TAKE THE QUIZ LEARNING CENTER GET LEGAL HELP MAKE

### Immi Screening: Family

Getting Started

Family

These are questions about your family. Sometimes a family member who has legal immigration status can help another family member qualify.

Is your mother alive?

Yes  No  I DON'T KNOW

Does she live in the U.S.?  Yes

NO thanks, I'm good!

I'm a chatbot that can help you find immigration resources.

Let's get started

What can I help you with?

Find legal help Learn about immigration options Tell me about my Check on an

**IMMI**  
<https://www.immi.org>

**KeepYourBenefits**  
<https://keepyourbenefits.org/en/na/use-the-guide>

Keep Your BENEFITS

Español | 中文

### Where will they have their Green card interview?

Inside the U.S.

Outside the U.S. (consulate)

I don't know

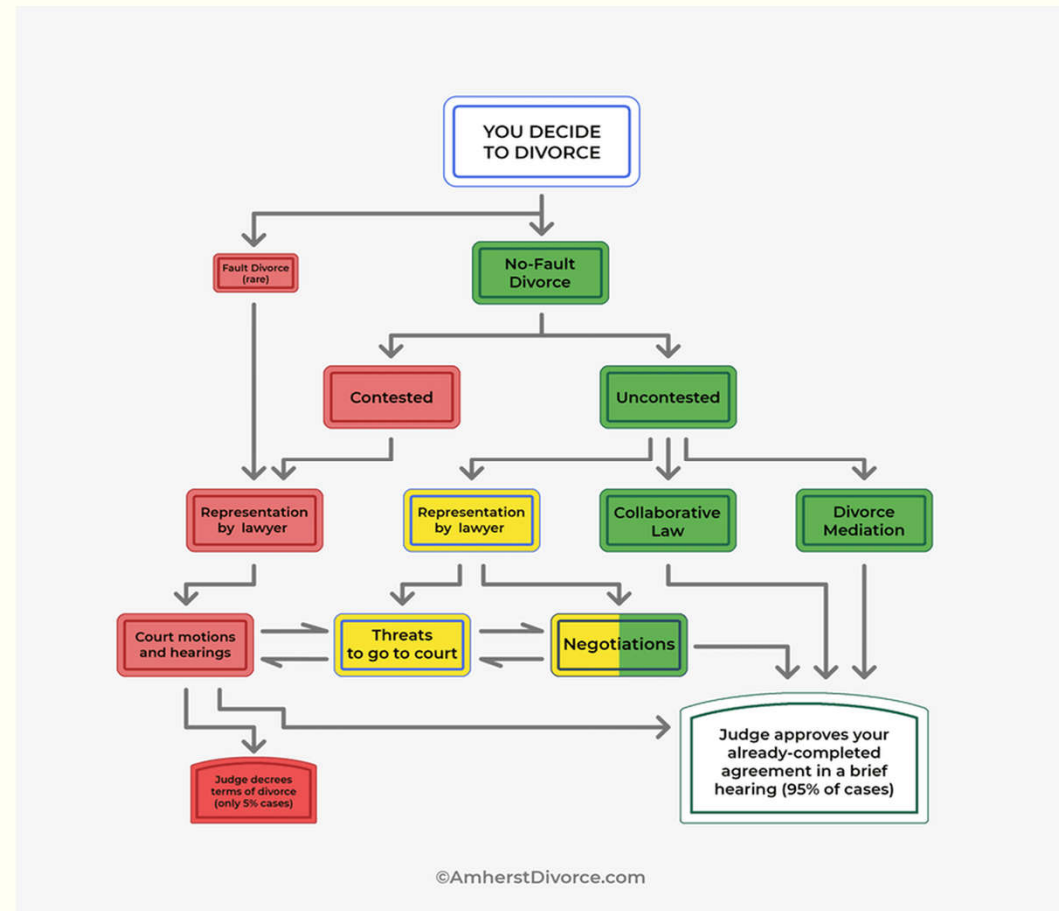
Why does this matter?

Continue

# Approaches to Designing Interviews

## Common method (forward chaining)

- Imagine a session between client/lawyer, helpdesk, legal aid service, etc
- List common flow of Q&A with final answer/advice (Dialog tree)
- Refine Q&A with branching and reduce repetition





# Approaches to Designing Interviews

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## Alternate method (backward chaining) – like project planning

- List target results & rules
- List Q&A to calculate rules
- Refine Q&A with plain language and flow

1

### Results

- Come up with target results + rules

2

### Questions

- Determine Q&A for rules

3

### Refine

- plain language, ordering, branching

## Alternative Approach (step-by-step)

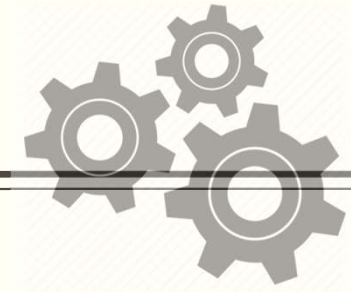
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- **High Level Objectives (intake)**
  - After a series of questions, notify the user if they are Eligible for service at Simon's Awesome Legal Aid
  - If not, explain why
  - If so, collect contact information

## Alternative Approach (step-by-step)

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### ▪ Step 1: Define end result

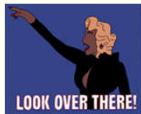
#### Result screen displaying



- “Congratulations, you are eligible”
  - Rule: live in NYC, housing issue, and income<\$1K/mth



- “Sorry, but you must make less than \$1000/mth”
  - Rule: live in NYC, housing issue, and income>\$1K/mth



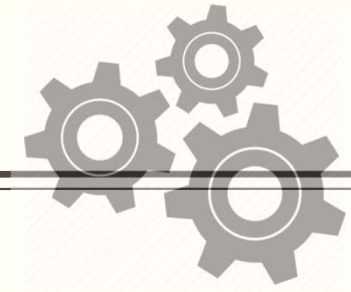
- “Please go to [www.lawhelpny.org](http://www.lawhelpny.org) to search for other legal aid organizations”
  - Rule: live in NYC, not housing issue



- “I’m sorry, this interview is for NYC residents only”
  - Rule: not live in NYC

## Alternative Approach (step-by-step)

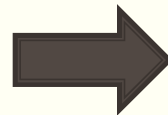
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### ▪ Step 2: Determine questions for rules

#### Rules

1. live in NYC, housing issue, and income < \$1K/mth
2. live in NYC, housing issue, and income > \$1K/mth
3. live in NYC, not housing issue
4. not live in NYC



#### Data point:

- Residence (city)
- Legal issue
- Income (monthly)

#### Questions:

- Where do you live?
- What is your legal issue?
- What is your monthly income?

## Alternative Approach (step-by-step)

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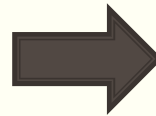


### Step 3: Refine

- a. reword/reorder questions
- b. set variables
- c. set ShowIf rules
- d. recode rules as formulas

#### Questions:

- Where do you live?
- What is your legal issue?
- What is your monthly income?



#### Refined Questions:

- Do you live in NY City?
  - **Values:** Y/N
  - **ID:** residence
- Which legal issue do you need help with?
  - **Values:** Dropdown of legal issues + other
  - **ID:** legal\_issue
  - **Showif:** residence=Y
- What is your average total monthly income?
  - **Values:** Textbox (currency)
  - **ID:** income
  - **Showif:** residence=Y and legal\_issue=housing
  - **Contextual help:** "Please estimate the total household income for each month before taxes"

#### Coded rules:

1. Residence=Y, legal\_issue=housing, income<1000
2. Residence=Y, legal\_issue=housing, income>1000
3. Residence=Y, legal\_issue<>housing
4. Residence=N



# Using the Interview Design Worksheet



<https://docs.google.com/spreadsheets/d/12yWVN1gfO9T8AO-mVVhbbDh0NmMv7OiaVh8cIKcsDAq/edit#aid=0>

	A	B	C	D	E
1	Interview Design Worksheet			STEP 1: Determine All Outputs	
2	2/3/2020			STEP 2: Enter rules for Output	
3				STEP 3: Enter questions for each Output rule variable	
4	<b>Author:</b>			STEP 4: Move questions to Calculated variables (e.g. Age calculation from DOB)	
5	Simon Rah			STEP 5: Recode Output rules and Output to use variable names	
6	<b>Interview Description</b>			STEP 6: Enter Display If rules	
7	An example of a questionnaire that results in an eligibility result page				
8					
9	<b>Question / Options</b>	<b>Question Display If Rule</b>	<b>Calculated Variables</b>	<b>Output Rule</b>	<b>Output</b>
10	<p><b>Title:</b> Welcome to the Intake Eligibility questionnaire. We will gather some information about you to check if you are eligible to receive services from SomeOrg.org</p> <p>Let's start with your name.</p> <p><b>Variable/Question/Option:</b> [Q1a_firstname] First Name [textbox] [Q1a_lastname] Last Name [textbox]</p> <p><b>Contextual Text:</b> Your confidentiality is important to us. Any personally identifiable information will not be shared with any third parties, except to provide direct services from SomeOrg.org</p>		C1_age = today - Q2_dob	C1_age >= 18 and Q3_residence = CA and Q4_income < \$1000/mth	<p><b>Display:</b> Congratulations [C2_name].</p> <p>You are eligible to receive services. We will contact you shortly to start your intake.</p> <p>If you have questions, please contact info@someorg.org</p>
11	<p><b>Title:</b></p> <p><b>Variable/Question/Option:</b> [Q2_dob] Please enter your Date of Birth [date textbox]</p> <p><b>Contextual Text:</b></p>		C2_name = Q1a_firstname + Q1a_lastname	C1_age < 18 or Q3_residence <> CA or Q4_income > \$1000/mth	<p><b>Display:</b> Dear [C2_name].</p> <p>Sorry, but you are eligible to receive services.</p> <p>If you have questions, please contact info@someorg.org</p>
12	<p><b>Title:</b></p> <p><b>Variable/Question/Option:</b> [Q3_residence] Where do you live?: [dropdown of states]</p>				

# Step 1: Define end results



- “Congratulations, you are eligible”
  - Rule: live in NYC, housing issue, and income<\$1K/mth
- “Sorry, but you must make less than \$1000/mth”
  - Rule: live in NYC, housing issue, and income>\$1K/mth
- “Please go to [www.lawhelpny.org](http://www.lawhelpny.org) to search for other legal aid organizations”
  - Rule: live in NYC, not housing issue
- “I’m sorry, this interview is for NYC residents only”
  - Rule: not live in NYC

D	E
Output Rule	Output
live in NYC, housing issue, and income<\$1K/mth	“Congratulations, you are eligible”
live in NYC, housing issue, and income>\$1K/mth	“Sorry, but you must make less than \$1000/mth”
live in NYC, not housing issue	“Please go to <a href="http://www.lawhelpny.org">www.lawhelpny.org</a> to search for other legal aid organizations”

## Step 2: Determine questions (& DisplayIf)



Question / Options	Question Display If Rule
<p><b>Title:</b> Do you live in NY City?</p> <p><b>Variable/Question/Option:</b> [residence_Y] Yes [residence_N] No</p> <p><b>Contextual Text:</b></p>	
<p><b>Title:</b> Which legal issue do you need help with?</p> <p><b>Variable/Question/Option:</b> [legal_issue_housing] Housing [legal_issue_money] Money and Taxes [legal_issue_family] Family and Safety [legal_issue_other] Other</p> <p><b>Contextual Text:</b></p>	residence_Y
<p><b>Title:</b> What is your average total monthly income?</p> <p><b>Variable/Question/Option:</b> [income] (textbox)</p> <p><b>Contextual Text:</b> Please estimate the total household income for each month before taxes</p>	residence_Y AND legal_issue_housing

### Questions:

- Do you live in NY City?
  - **Values:** Y/N
  - **ID:** residence
- Which legal issue do you need help with?
  - **Values:** Dropdown of legal issues + other
  - **ID:** legal\_issue
- What is your average total monthly income?
  - **Values:** Textbox (currency)
  - **ID:** income
  - **Contextual help:** “Please estimate the total household income for each month before taxes”



## Step 3: Refine Questions & Rules



### Refined Questions:

- Do you live in NY City?
  - **ID:** residence
- Which legal issue do you need help with?
  - **ID:** legal\_issue
- What is your average total monthly income?
  - **ID:** income

Output Rule	Output
live in NYC, housing issue, and income<\$1K/mth (residence_Y AND legal_issue_housing AND income<1000)	"Congratulations, you are eligible
live in NYC, housing issue, and income>\$1K/mth (residence_Y AND legal_issue_housing AND income>1000)	"Sorry, but you must make less t
live in NYC, not housing issue (residence_Y AND legal_issue_other)	"Please go to <a href="http://www.lawhelpny.org">www.lawhelpny.org</a> aid organizations"

# Interview Authoring Tools



Tool	Best for	Notes
HotDocs	Complex interview & generated docs (web based)	Steep learning curve, limited UI flexibility
A2J	Simple interview & generated docs (web based)	Simple UI, free, limited UI flexibility
Neota Logic	Complex interview, generated docs & triage result (web based)	Steep learning curve, expensive, highly flexible UI
Afterpattern	Complex interview, generated docs & triage result (web based)	Simple UI, free, limited UI flexibility
LegalServer Authoring	Intake interviews with branching logic; programs that use LS for case management	
Landbot.ai	Simple interview, chatbot (widget + chat svcs)	Simple UI, cheap, very limited UI flexibility. Integrates well with chat tools + IoT
Survey monkey, Google forms, Office forms	Simple surveys (web based, data gathering only)	Simple UI, free, limited UI flexibility

# What authoring tool was used?

Neota Logic

CLIENT PROFILE

You've elected to do the Standard Risk Assessment.

Please provide the CLIENT'S CONTACT INFORMATION:

First Name:

Last Name:

Age Reported by Client:

Gender:  Female  Male  Non-binary/third gender  Prefer not to self describe

Phone:

I have issues with phone reception, so please try calling me several times and leave a voicemail with a callback phone number

Landbot

immia

Hi there, I'm a chatbot that can help you find immigration resources.

Let's get started

What can I help you with?

Find legal help | Learn about immigration systems

HotDocs

LawHelp INTERACTIVE Legal documents made simpler powered by probono.net

Employment Agreement

Interview Outline

Employee Information

Agreement Information

Job Information

Salary and Benefits

Agreement Information

Agreement Date: 8/12/2020

Company Representative:  Ed Walters  Stephanie Hanson  Kim Schuster

Signature Date (Leave blank if unknown) (KH Edit 6-17-20 rebuild) (KH Edit 6-19-20 prod) <=M/d/yyyy>

Application

1 Complete N-400

Intro 1 2 3 4 5 ... 9 Done

Your Contact Information

Your Phone Numbers

Daytime Phone\* (111) 222-3333 Evening Phone\* (111) 222-3333

Cell Phone (if any) Work Phone (if any)

\*10 Digit Phone Number \*10 Digit Phone Number

Email (if any) srates517@lanesting.com

Your Current Address

Street Number and Name: 1 main st

Age Sex Race Number: [ ] [ ] [ ] "No number"

PBN Proprietary

LawHelp INTERACTIVE powered by probono.net

MY PROGRESS Step 1 of 1 Enter your name

Enter your name

First: (required)

Middle:

Last: (required)

Continue

1 YOUR INFORMATION

2 SET DOCUMENT

A2J

Where will they have their Green card interview?

Inside the U.S.

Outside the U.S. (consulate)

I don't know

Why does this matter?

Continue

Afterpattern

immia Free and simple information for immigrants

Immigration Screening: Family

Getting Started

Family

These are questions about your family. Sometimes a family member who has legal immigration status can help another family member qualify.

Is your mother alive?

Yes  No  I don't know

Does she live in the U.S.?

PBN Proprietary



QUESTIONS?

## Contact Us for More Information

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- Tim Baran

- Pro Bono Net, Inc. Technology Innovations Manager, LawHelpNY
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